



SOUTH EAST
LOCAL ENTERPRISE
PARTNERSHIP

Key Indicators Report

UK's Global Gateway

December 2022

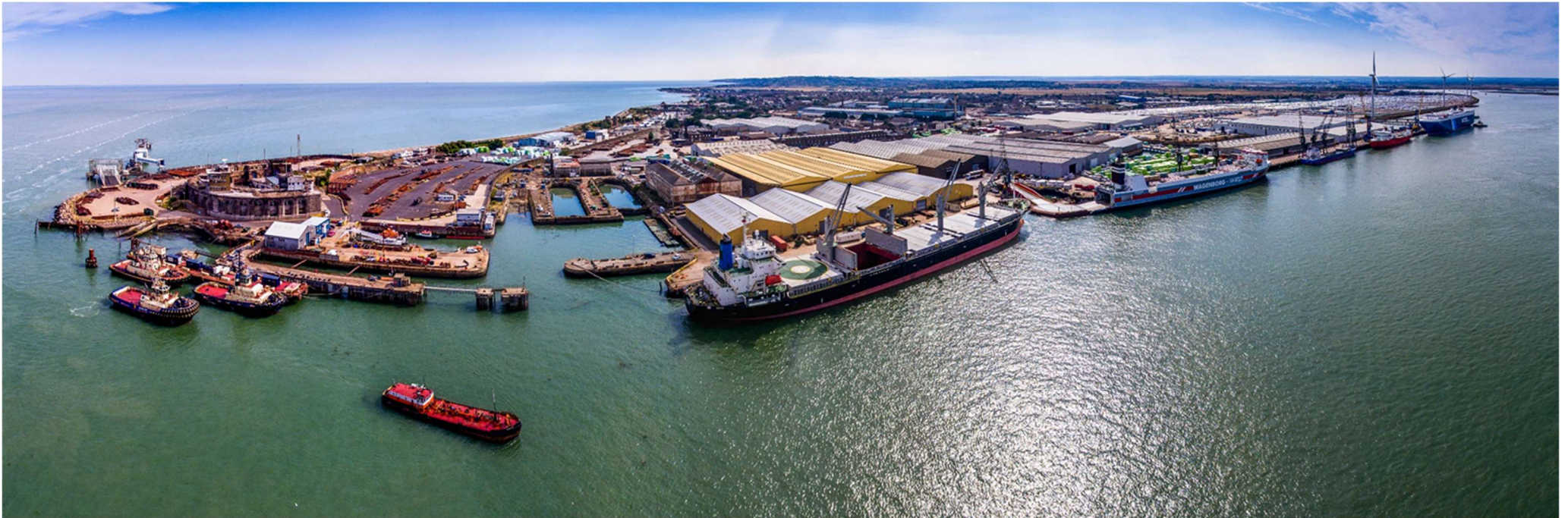
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Headline Summary

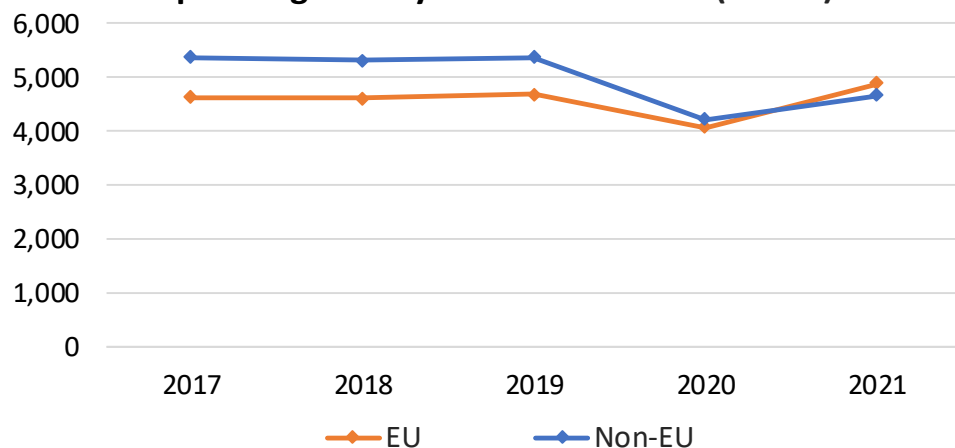
- SELEP's export value of goods increased in 2021 after a fall in 2020, with EU trade increasing more than Non-EU exports with exports of Chemicals and Machinery and Transport now lower than pre-pandemic levels
- Import tonnage through SELEP ports remains high at 25% of the UK major port total, although throughput at Dover has reduced during 2022
- Stansted continues to have a higher share of UK air-freight tonnage, having seen an increase in throughput during the pandemic, although throughput of exports has declined in recent quarters
- Port passenger numbers at Dover were lower throughout most of 2021 compared to 2020 and despite some recovery in late 2021 still remain more than 28% below pre-pandemic levels
- Airport passenger numbers, having reduced to near zero during lockdown periods picked up in late 2021 and reached 84% of 2019 levels in quarter 3, 2022, with Stansted having recovered slightly more than UK airports overall



Export Value of Goods

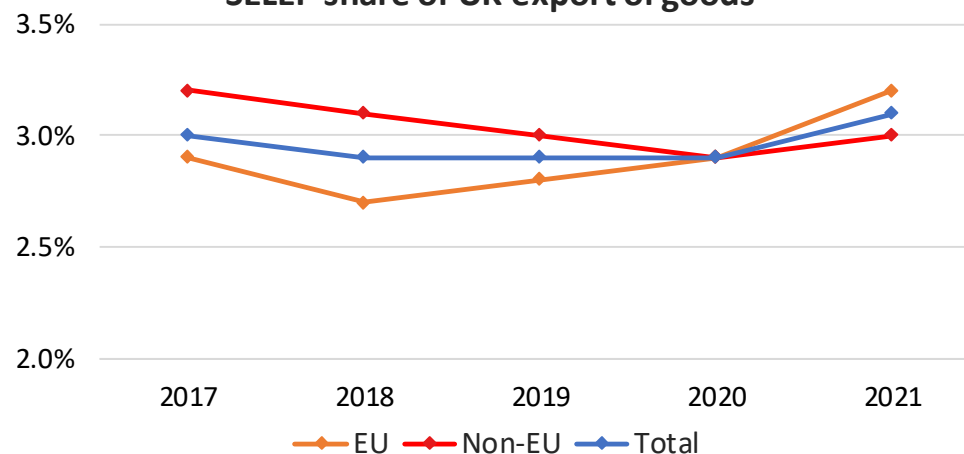
- Export trade value of goods for SELEP businesses increased in 2021 after a sharp fall in 2020
- EU trade increased most and now exceeds non-EU exports
- Since 2019 non-EU exports have declined most for Chemicals and related products, with losses for machinery and equipment as well
- For EU trade increases have been seen for most products, and particularly manufactured goods with food and chemicals seeing a decline

Export of goods by SELEP businesses (£ mill.)



	2017	2018	2019	2020	2021
EU £ mill	4,636	4,619	4,693	4,073	4,894
Non-EU £ mill	5,373	5,319	5,377	4,222	4,663
Total	10,009	9,938	10,070	8,295	9,557

SELEP share of UK export of goods



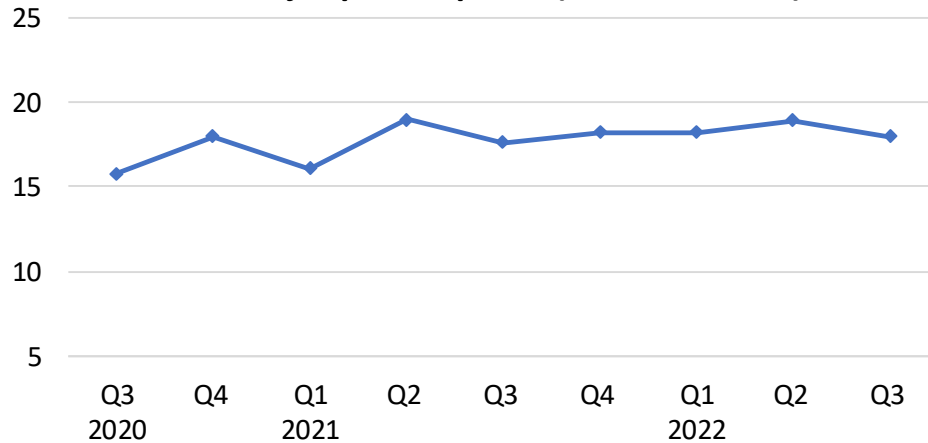
	2017	2018	2019	2020	2021
EU	2.9%	2.7%	2.8%	2.9%	3.2%
Non-EU	3.2%	3.1%	3.0%	2.9%	3.0%
Total	3.0%	2.9%	2.9%	2.9%	3.1%

Source: HMRC, Regional trade in goods

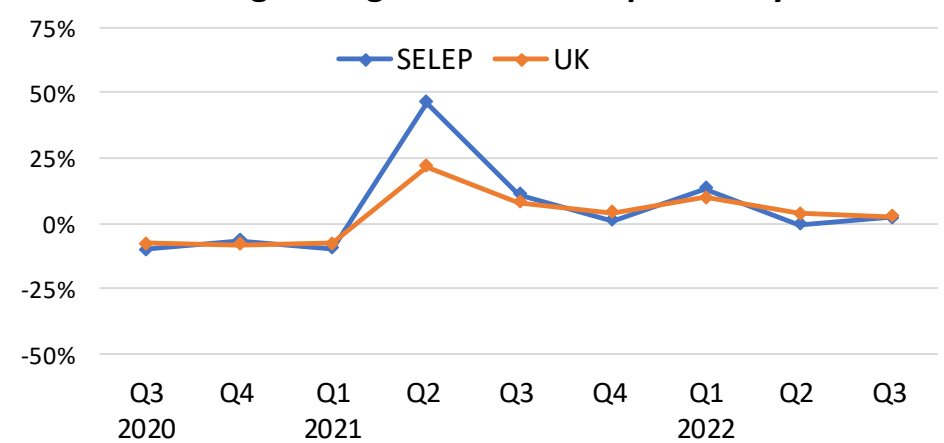
Port Imports

- The SELEP area is host to five of the country's major ports, London, Dover, Medway, Harwich and Newhaven
- SELEP ports collectively handle a quarter of the UK's sea-borne import freight tonnage
- Import tonnage reduced significantly within lockdown periods during the pandemic
- Quarter 2 of 2021 saw strong recovery with import tonnage returning to pre-pandemic levels
- In the most recent quarters import tonnage has been high in London, but low for Dover

SELEP major port imports (million tonnes)



Percentage change on same time previous year



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	15.8	18.0	16.1	19.0	17.6	18.2	18.2	18.9	18.0
UK Share	24%	25%	24%	26%	24%	25%	25%	24%	24%

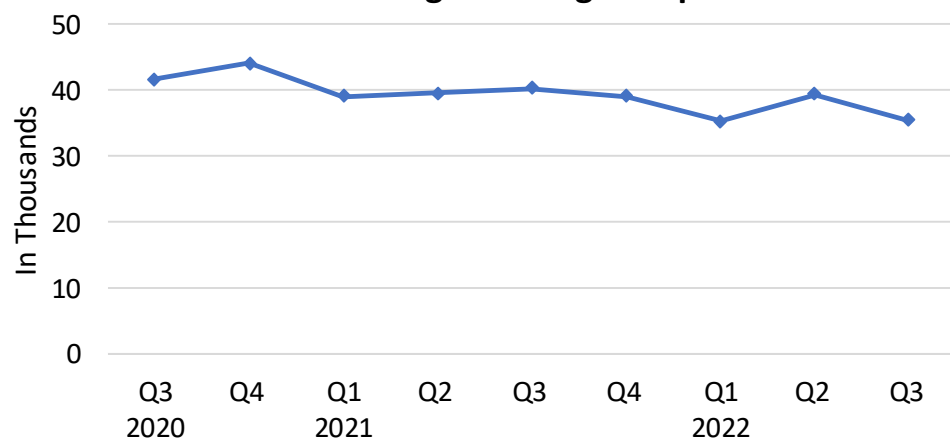
	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	-10%	-7%	-10%	46%	11%	1%	13%	-1%	2%
UK	-8%	-8%	-8%	22%	8%	4%	10%	4%	3%

Source: DfT, Major Port Statistics, Table 502

Air Freight

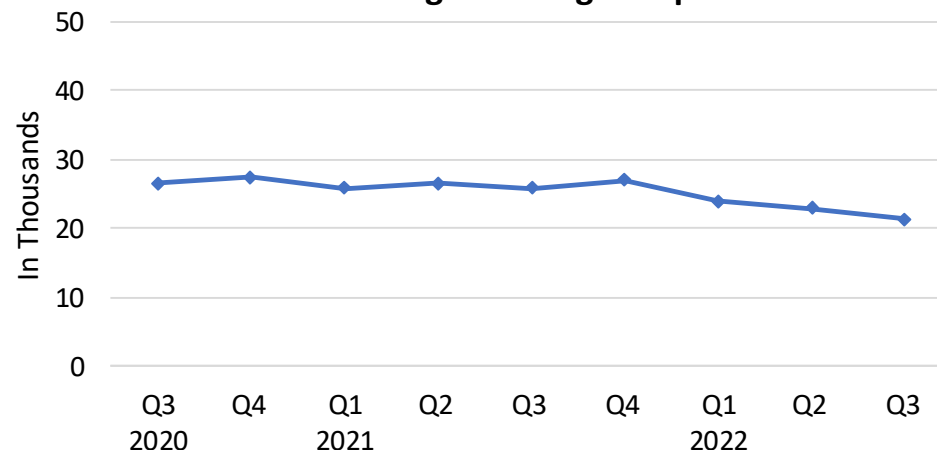
- Stansted airport is the UK's third largest airport in terms of air freight handled
- During the pandemic, with reduced passenger numbers, Stansted took on a greater share of the country's air freight
- The share of both national imports and exports has reduced slightly in recent quarterly figures
- However tonnage throughput remains high compared to 2019 levels
- Over the last year, Southend airport has also been handling air freight, with reduced passenger numbers

SELEP air-freight tonnage - Imports



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	41.7	44.1	39.1	39.6	40.3	39.1	35.4	39.5	35.5
UK Share	20%	17%	18%	18%	18%	16%	16%	18%	17%

SELEP air-freight tonnage - Exports



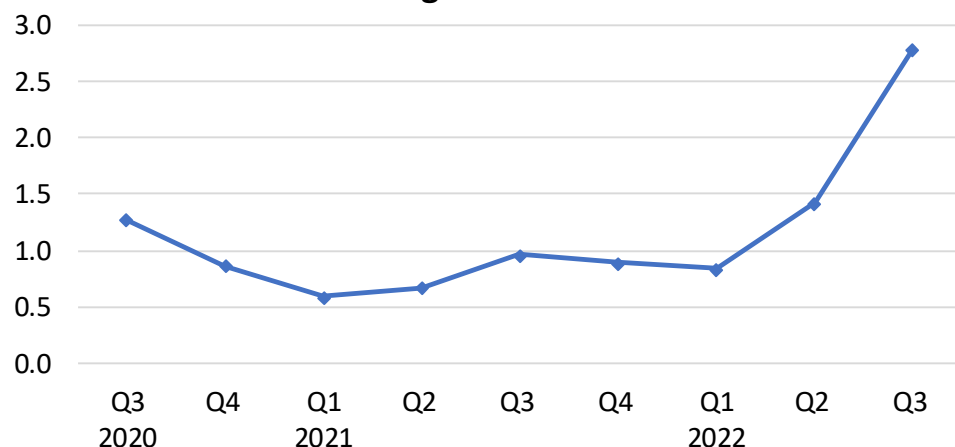
	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	26.6	27.4	25.9	26.5	25.9	27.0	24.0	23.0	21.4
UK Share	17%	15%	16%	17%	17%	15%	15%	14%	14%

Source: CAA, Airport data, Table 13

Port Passengers

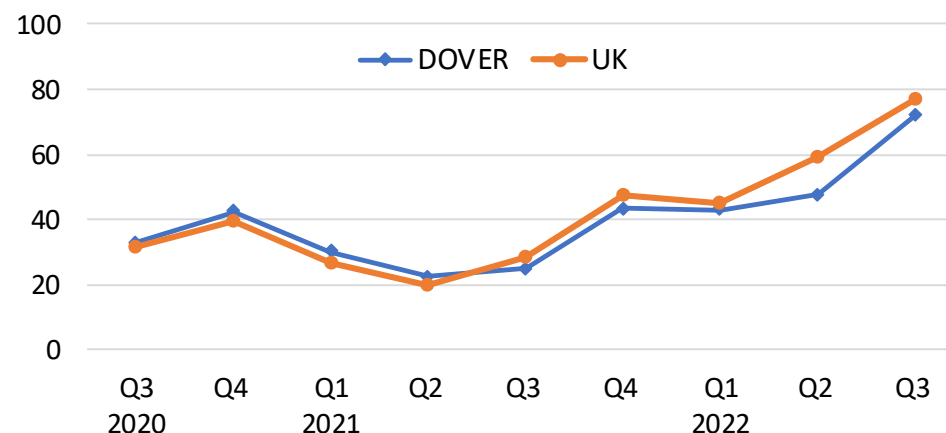
- Ports in the SELEP area account for two thirds of the UK's short sea ferry passengers
- The port of Dover accounts for the majority of these passengers, with a 59% share of UK ferry passenger numbers
- Passenger numbers declined to less than a quarter of usual seasonal numbers during COVID, and have been slow to increase again
- Quarter 3 of 2022 saw a strong recovery in passenger numbers although still remaining significantly below the usual seasonal level

Dover Passenger Numbers - millions



	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
DOVER	1.27	0.86	0.59	0.67	0.96	0.89	0.84	1.42	2.79

Passenger Index (2019=100)

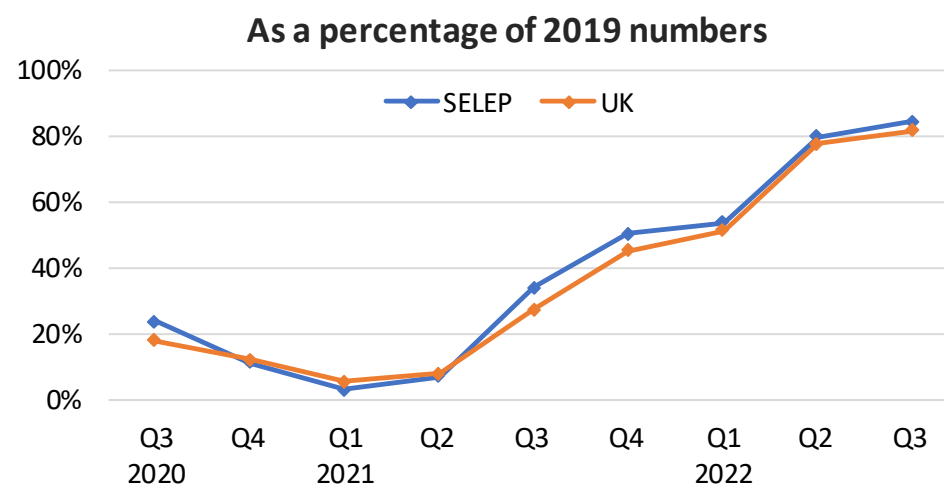
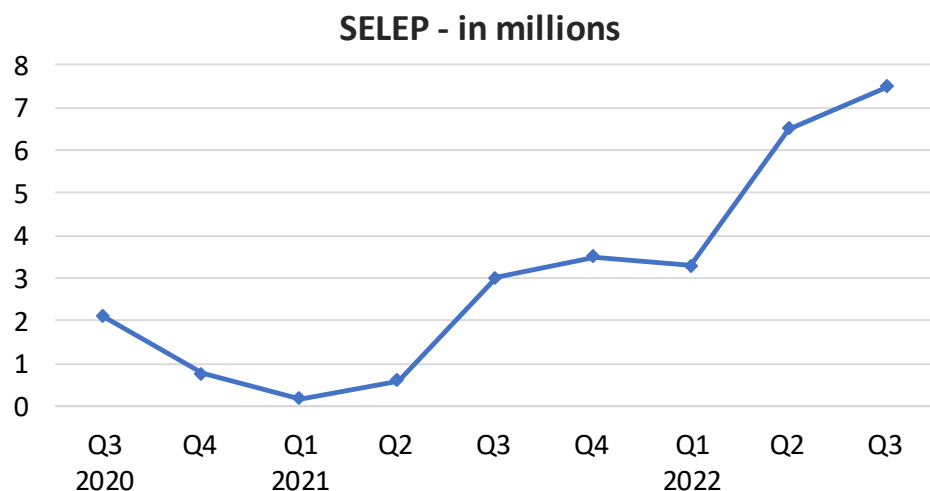


	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
DOVER	33	42	30	22	25	43	43	48	72
UK	32	40	26	20	29	48	45	59	77

Source: Port of Dover

Airport Passengers

- The SELEP area is host to two of the London Area International Airports – Stansted and Southend
- Airport passenger numbers reduced significantly during COVID, and numbers remained at very low levels until quarter 3 of 2021
- Quarter 2 of 2022 saw a significant recovery in airport passenger numbers, and increasing further in Quarter 3 they remained some 16% below the pre-pandemic level




	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	2.1	0.8	0.2	0.6	3.0	3.5	3.3	6.5	7.5
UK	16.0	8.2	3.4	6.3	24.4	30.4	31.0	61.9	72.4


	2020		2021		2022				
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
SELEP	24%	11%	3%	7%	34%	50%	54%	80%	84%
UK	18%	12%	6%	8%	27%	45%	51%	77%	81%


Source: CAA, Airport data, Table 9



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