



**SOUTH EAST**  
LOCAL ENTERPRISE  
PARTNERSHIP

**Key Indicators Report**

# **UK's Global Gateway**

June 2023



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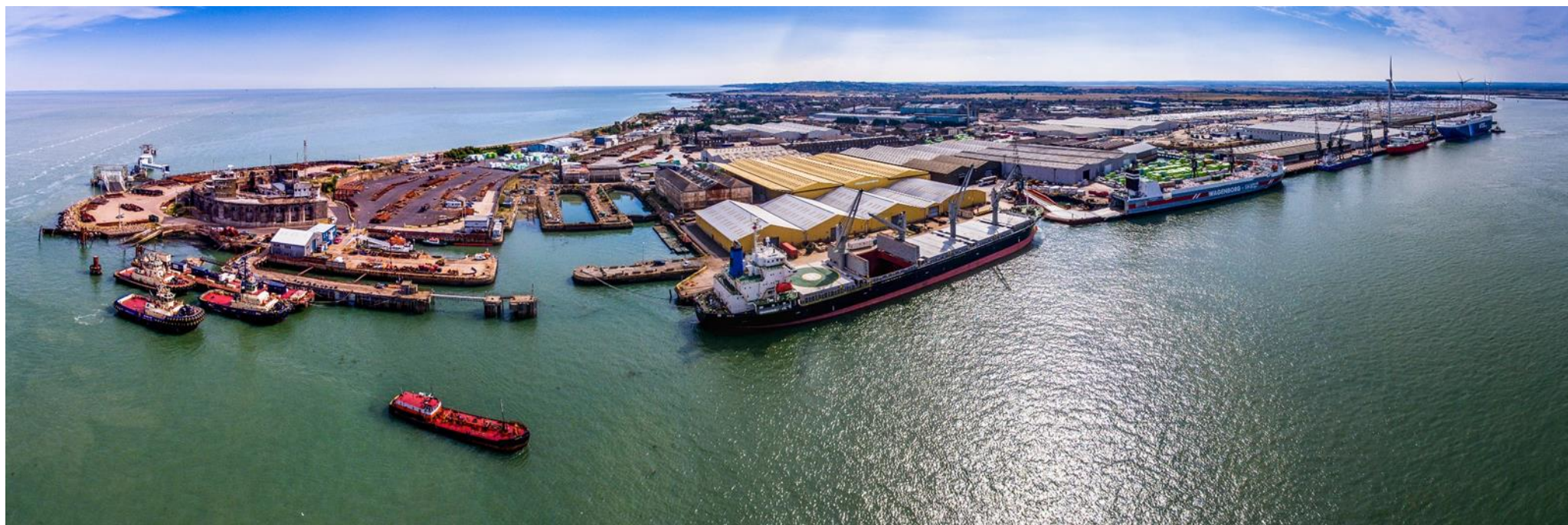
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# Headline Summary

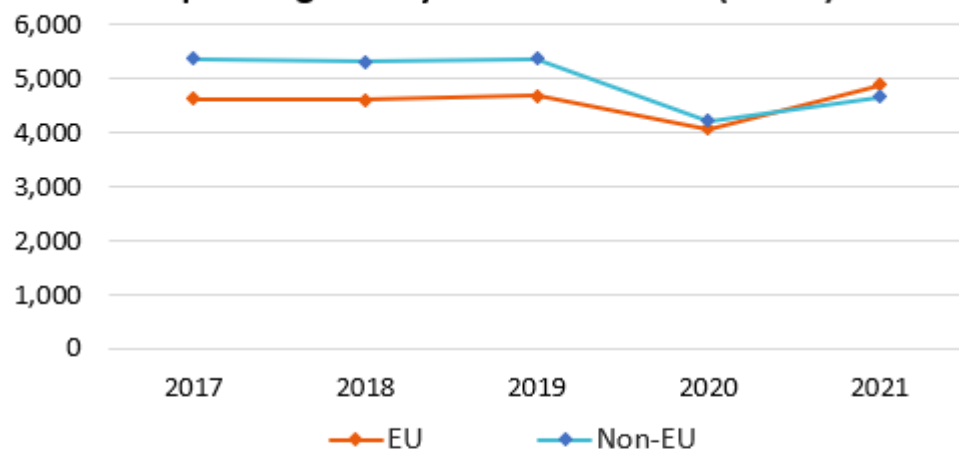
- SELEP's export value of goods increased in 2021 after a fall in 2020, with EU trade now exceeding Non-EU exports.
- Import tonnage through SELEP ports remains high at 26% of the UK major port total, with stable import tonnage figures since Q2 2021. London continues to be SELEP's largest contributor, with an increasing contribution from Medway and a fall in Dover.
- SELEP air freight imports and exports remain significantly above pre-pandemic levels in both absolute value and UK share, as Stansted continues to be the UK's third largest contributor, in conjunction with the introduction of air freight to Southend in 2021.
- The Port of Dover was responsible for 57% of UK ferry passengers in 2021 and despite small improvements in 2022, figures remain significantly below the pre-pandemic numbers.
- Airport passenger numbers, having reduced to near zero during lockdown periods, picked up in late 2021 and saw a small continual recovery across 2022, with the Q4 statistic being only 12% lower than the pre-pandemic number.



# Export Value of Goods

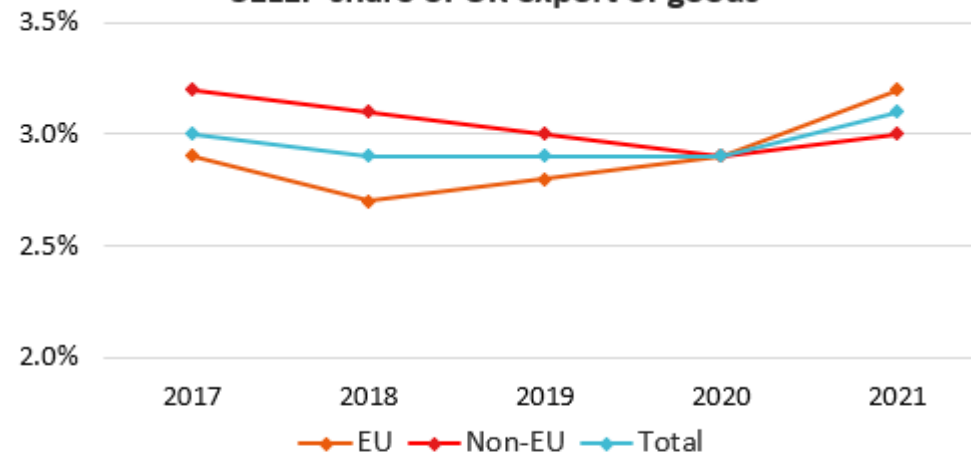
- The export value of goods from SELEP businesses increased in 2021 following a sharp fall in 2020.
- EU trade increased more and now exceeds non-EU exports.
- Since 2019 non-EU exports have declined most for Chemicals and related products, with losses in Machinery and Equipment as well.
- For EU trade, increases have been seen for most products, especially in 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
<b>Total</b>	<b>10,009</b>	<b>9,938</b>	<b>10,070</b>	<b>8,295</b>	<b>9,557</b>

SELEP share of UK export of goods



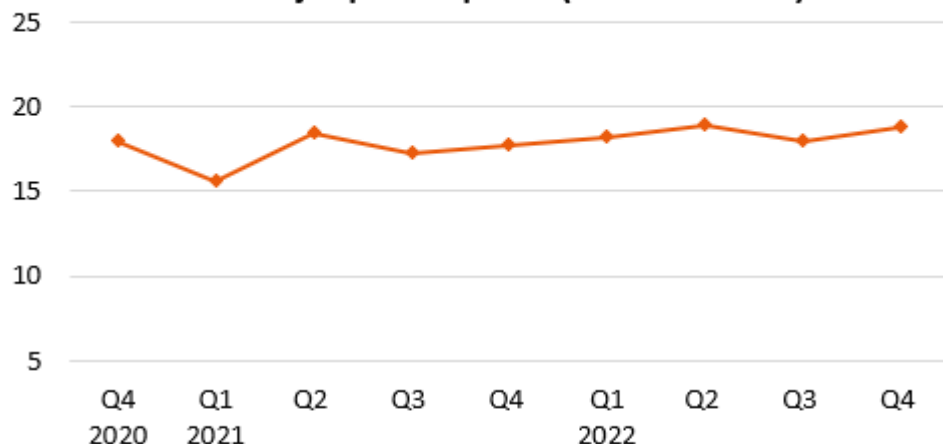
	2017	2018	2019	2020	2021
EU	2.9%	2.7%	2.8%	2.9%	3.2%
Non-EU	3.2%	3.1%	3.0%	2.9%	3.0%
<b>Total</b>	<b>3.0%</b>	<b>2.9%</b>	<b>2.9%</b>	<b>2.9%</b>	<b>3.1%</b>

Source: HMRC, Regional trade in goods

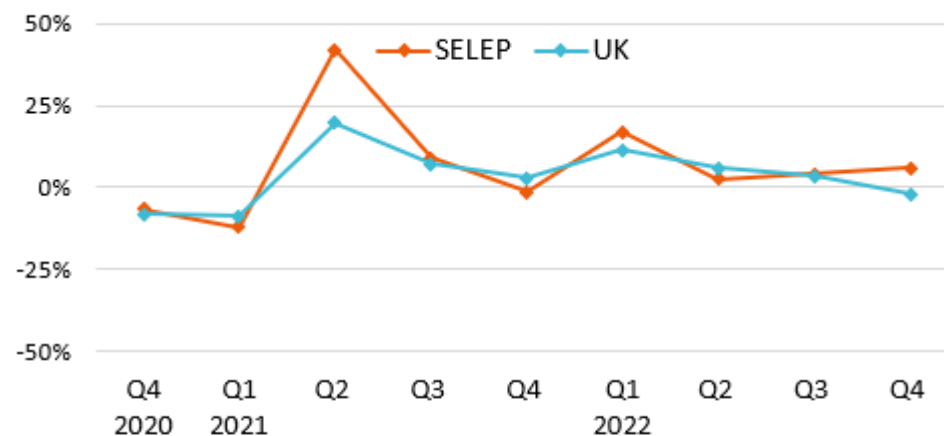
# Port Imports

- 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.
- Q2 of 2021 saw a strong recovery and import tonnage has remained stable since.
- In 2022 import tonnage has been high in London and Medway; but low for Dover.

**SELEP major port imports (million tonnes)**



**Percentage change on same time previous year**



	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>SELEP</b>	18.0	15.6	18.4	17.3	17.8	18.2	18.9	18.0	18.8
<b>UK Share</b>	25%	24%	25%	24%	24%	25%	24%	24%	26%

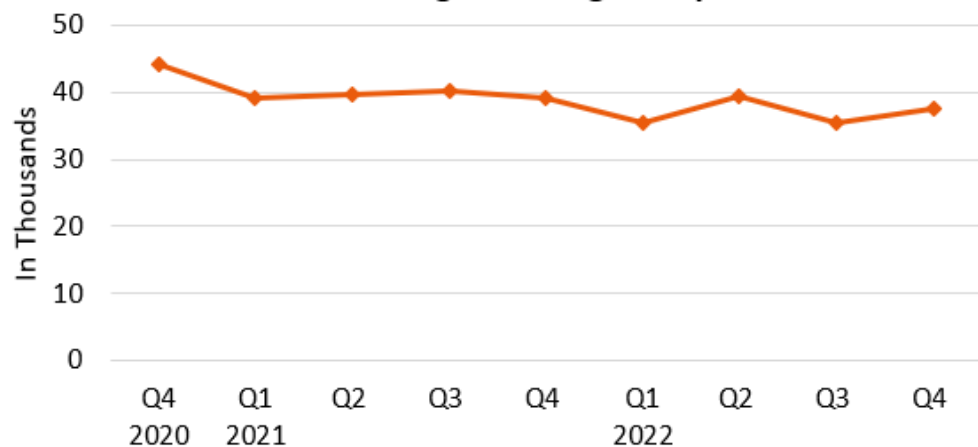
	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>SELEP</b>	-7%	-12%	42%	9%	-2%	17%	3%	4%	6%
<b>UK</b>	-8%	-9%	20%	7%	3%	12%	6%	4%	-2%

Source: DfT, Major Port Statistics, Table 502

# Air Freight

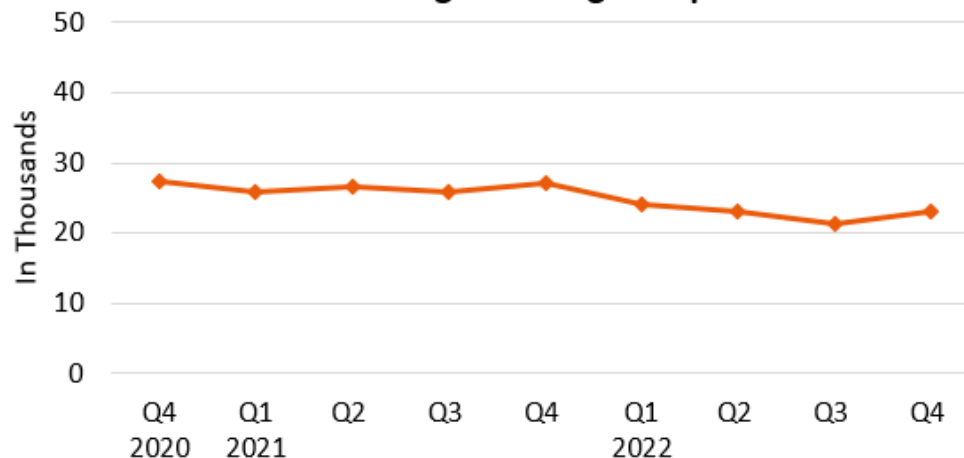
- Stansted Airport is the UK's third largest airport in terms of air freight handled.
- SELEP import tonnage in 2022 was low at an absolute level; however, SELEP's share of UK tonnage increased compared to 2021.
- SELEP export tonnage in 2022 was lower than the previous couple of years both in terms of absolute value and its UK share.
- However, SELEP air freight imports and exports remain significantly above pre-pandemic levels in both absolute value and UK share.
- Since 2021 Southend Airport has become involved in air freight, increasingly so in 2022.

**SELEP air-freight tonnage - Imports**



	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>SELEP</b>	44.1	39.1	39.6	40.3	39.1	35.4	39.5	35.5	37.7
<b>UK Share</b>	17%	18%	18%	18%	16%	16%	18%	17%	19%

**SELEP air-freight tonnage - Exports**



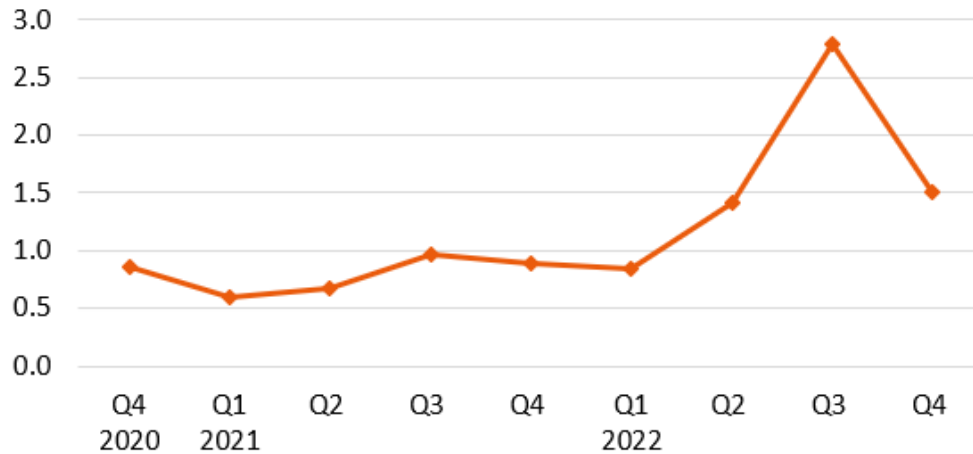
	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>SELEP</b>	27.4	25.9	26.5	25.9	27.0	24.0	23.0	21.4	23.0
<b>UK Share</b>	15%	16%	17%	17%	15%	15%	14%	14%	14%

Source: CAA, Airport data, Table 13

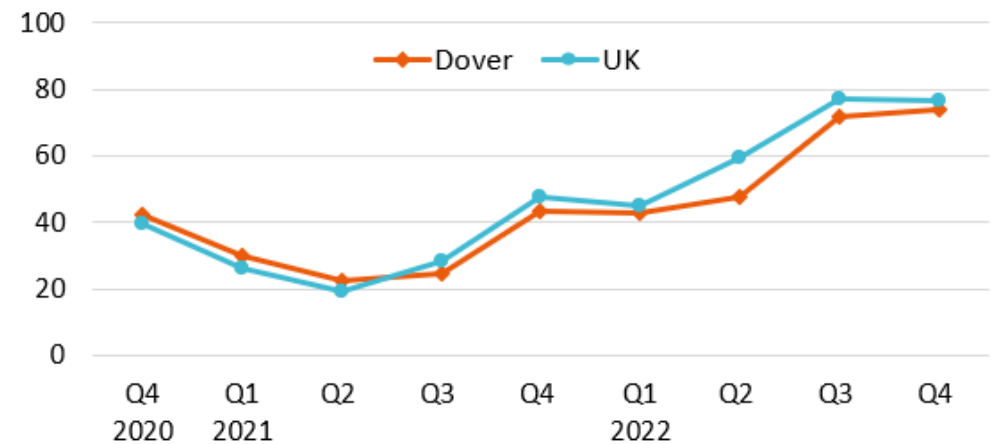
# Port Passengers

- Ports in the SELEP area account for two thirds of the UK's short sea ferry passengers.
- The Port of Dover alone accounts for 57% of UK ferry passengers.
- Passenger numbers declined to less than a quarter of usual seasonal numbers during COVID and have been slow to increase again.
- Quarter 4 of 2022 saw numbers fall dramatically, whilst this is historically the case in the last quarter of the year, numbers remain significantly below pre-pandemic figures; despite an improvement on 2021.

**Dover Passenger Numbers - millions**



**Passenger Index (2019=100)**



	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Dover</b>	0.86	0.59	0.67	0.96	0.89	0.84	1.42	2.79	1.51

	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Dover</b>	42	30	22	25	43	43	48	72	74
<b>UK</b>	40	26	20	29	48	45	59	77	76

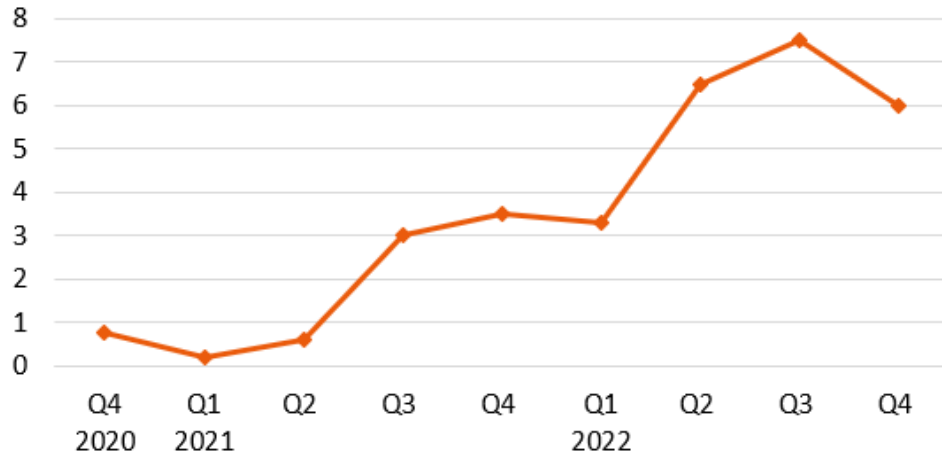
Source: Port of Dover



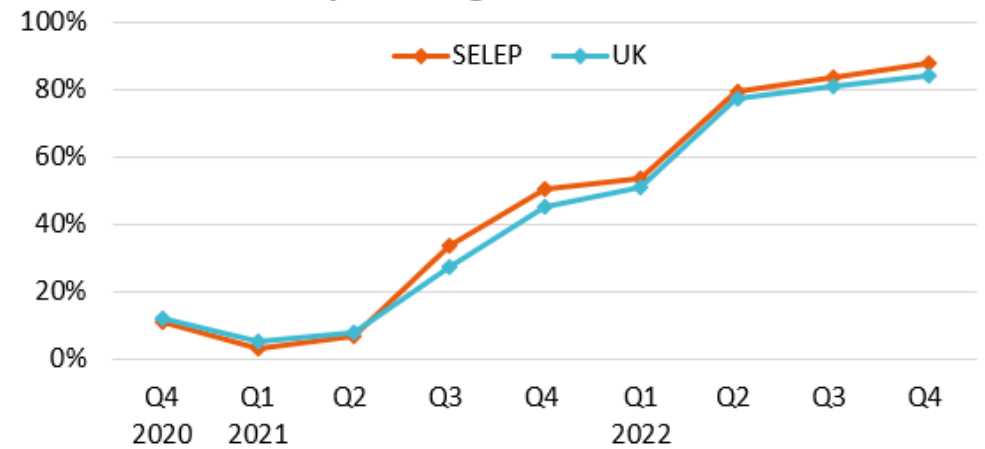
# Airport Passengers

- 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 Q4 of 2021.
- 2022 has seen a continual recovery in passenger numbers relative to the pre-pandemic figures. Although passenger numbers fell in Q4 2022, they were only 12% lower than Q4 2019 (compared to Q4 2021 when numbers were 50% lower than Q4 2019).

SELEP - in millions



As a percentage of 2019 numbers



	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
SELEP	0.8	0.2	0.6	3.0	3.5	3.3	6.5	7.5	6.0
UK	8.2	3.4	6.3	24.4	30.4	31.0	61.9	72.3	56.5

	2020		2021			2022			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
SELEP	11%	3%	7%	34%	50%	54%	80%	84%	88%
UK	12%	6%	8%	27%	45%	51%	77%	81%	84%

Source: CAA, Airport data, Table 9






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