

EXPORTING EXCELLENCE



BOOSTING UK TRADE,
DRIVING ECONOMIC
GROWTH

DECEMBER 2023

Heathrow

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Executive summary

Exporting is the backbone of the UK economy. In 2022, the UK ranked fifth globally for total value of exports. Exports added roughly £900 billion to the economy, supporting around 300,000 businesses¹.

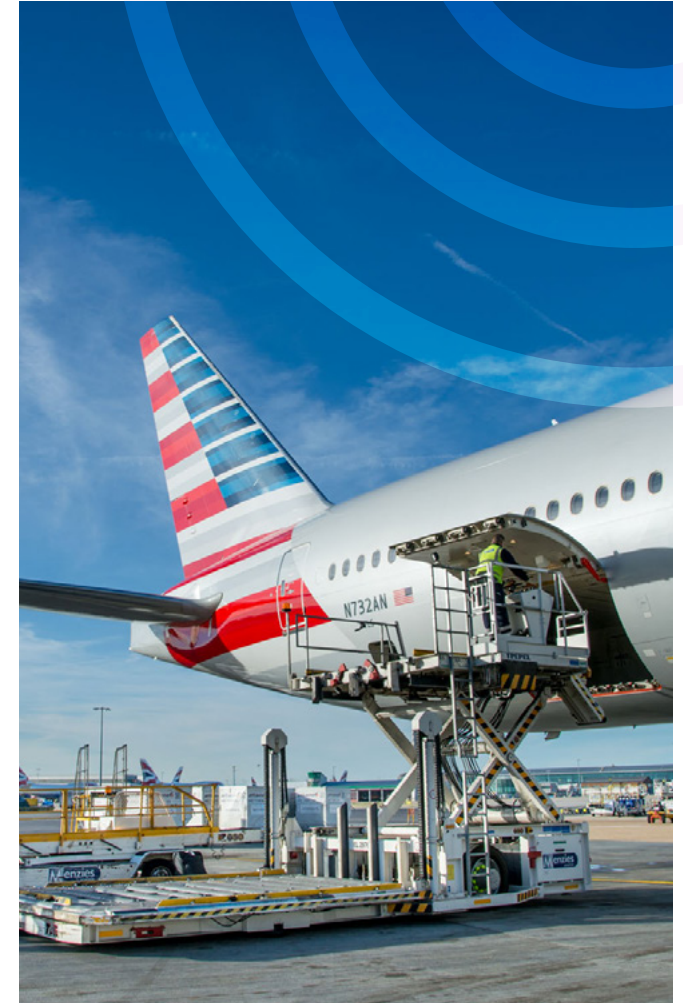
The UK's exporting strength depends on vibrant and dynamic businesses operating across the country. From high-value manufacturers in the North East to salmon farmers in Scotland, from packaging producers in Northern Ireland to family-run food retailers in Wales, export businesses are key drivers of economic growth.

As the UK's only hub airport, Heathrow is a vital partner to these businesses, helping to connect the whole of the UK to global growth. UK exports to non-EU nations via Heathrow were alone worth over £100 billion last year.

Hub connectivity makes all of this possible. It enables us to pool passenger and cargo demand to optimise trading opportunities for UK businesses. That's how we reach 239 destinations in 89 countries across the world. And 95% of our air cargo travels in the belly hold of passenger aircraft.

However, as the UK export market has continued to grow and evolve, so too have the challenges and barriers many businesses face. Behind these barriers lies a wealth of untapped potential: around 375,000 SMEs produce exportable goods that they are not currently exporting. The shortfall amounts to a potential export revenue of £290bn a year^{2,3}. Unlocking just 10% of this capacity could create up to 215,000 direct jobs and 50,000 additional jobs in professional and scientific sectors alone⁴.

To understand how to overcome the challenges businesses are facing – and to release their potential – we worked with local chambers of commerce. Throughout September 2023 we brought together businesses, policymakers, politicians and aviation experts from six regions and nations across the UK. We discussed how Heathrow; the Government and industry can work together to create a stronger export market for UK businesses.





This report presents feedback from these discussions. It offers initial solutions and policy themes showing how we can work together to further boost exports. At our roundtable events, delegates highlighted a range of challenges. They include sustainability, skills, connectivity, tax incentives, red tape, access to finance and the need for a clear and overarching strategic plan for export growth. Their comments and insights lay the groundwork for a national conversation about unlocking export potential.

1. UK exporters said that they want to be more sustainable because they understand the need for decarbonisation. But this is challenging in a market where inflationary costs affect business operations and revenues. Businesses will not be able to decarbonise if the costs remain high. They are, however, keen to export sustainably via air cargo powered by sustainable aviation fuel (SAF); they support the need for Government to go further and faster in delivering a domestic SAF industry.

2. Businesses want to simplify customs processes that many found to be complex and challenging. While Heathrow welcomes the progress made towards digitalisation, further modernisation is needed to make exporting more efficient and effective.
3. Many businesses are suffering from a shortage of exporting skills. Although exporting offers fulfilling career prospects and skills development, there is little awareness about exporting as a career. Further collaboration between industry, Government and local chambers of commerce is vital to show the opportunities a career in exports offers jobseekers and people leaving education.

With our levels of global connectivity, Heathrow believes the UK has a unique opportunity to build on its export growth and unlock new opportunities for businesses around the country. Exporting Excellence is the first step towards creating deeper partnerships with a range of stakeholders, and to developing a more sustainable, modern and skilled exporting economy – one that propels the UK towards greater economic growth.

Why do exports matter?

Around a third of the UK's GDP comes from exporting goods and services⁵. Top British exports include machinery, automobiles and other transport equipment, electrical and electronic equipment (including computers), chemicals and medical products. Many of these products travel to their markets via Heathrow in the belly hold of passenger flights.

UK exports jumped by 16.2% in 2022⁶. While some of this increase relates to a recovery from two years of sluggish growth following the COVID-19 pandemic, the numbers also represent a 13.9% increase on 2019 levels. The improvement was driven by increased trade with rapidly recovering developing economies.

The UK plays a key role in the export value chain

UK exports are not just final products, but vital components of complex global supply chains. UK expertise contributes a significant part of the 'value chain' – the value attributed to the various stages of a product's production and distribution. The UK scores well in this respect: the domestic content of UK exports is around 85%, well above the OECD average of 75% and the EU average of 70%⁷. While the UK continues to be strong in the export of services, it has seen significant gains in exports of technology, electronics and motor vehicles. And an increase in overseas demand for chemicals, basic metals, electrical equipment, machinery and transport have all helped boost UK revenues.

Since 2019, exports of power-generating components (eg engines, electricity generation, fuel systems), have grown by 27%, exports of specialised machinery by 31%, exports of industrialised machinery (eg agricultural machinery) by 22% and exports of road vehicles (other than cars) by 73%⁸.

Contributing to employment and productivity

The Department for Business & Trade (DBT) estimates⁹ that median wages for jobs directly and indirectly supported by exports are on average 7% above the national average. This is driven by the fact that goods-exporting businesses are on average 21% more productive than those that do not export. When exports grow, job numbers also grow. Exports currently support 6.5 million jobs – roughly 23% of the UK's total full-time equivalent jobs¹⁰.

Exposure to international competition also incentivises businesses to adopt best practices¹¹, invest more in research and development (UK exporters invest three to 15 times as much of their revenue in R&D as domestically focused firms)¹², and specialise in their production process. Evidence collected in 2016 indicated that nearly three-quarters – around 74% – of all export-linked jobs were outside London. That represents hundreds of thousands of jobs in each region, from 129,000 in Northern Ireland to 630,000 in the North West of England¹³.

The role of air cargo in UK exports

Air cargo is a key part of this export story.

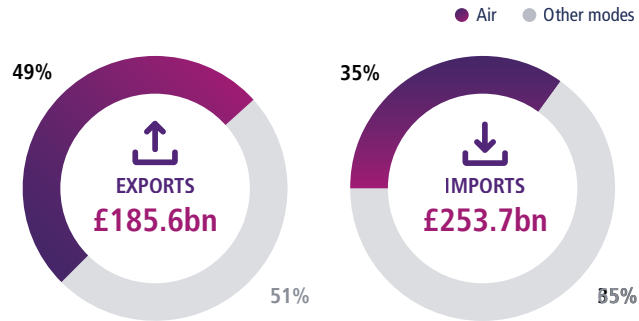
Air cargo services contribute over £145 billion to the UK economy in exports¹⁴. According to research from 2018, the air cargo industry itself generates an additional £7.2 billion, supporting 151,000 jobs, while £87.3 billion of the UK economy's gross value added (GVA) is dependent on the air cargo sector¹⁵.

Although air cargo represents just 1% of total UK trade tonnage, its value to the UK economy is massive. It accounts for 40% of the total value of UK trade¹⁶.

Air cargo plays a vital role in the export of high value per kilo products, such as gold (reflecting London's globally central financial role), power-generating machinery, complex manufactured goods, transport equipment, scientific equipment and pharmaceuticals.

Air cargo is also an essential component of regional development. It accounts for 9% of GVA in the North West (worth £14.9 billion), 6% in Wales (£5.1 billion), 7.6% in the East Midlands (£8.1 billion) and 6.8% in the South West (£8.7 billion)¹⁷.

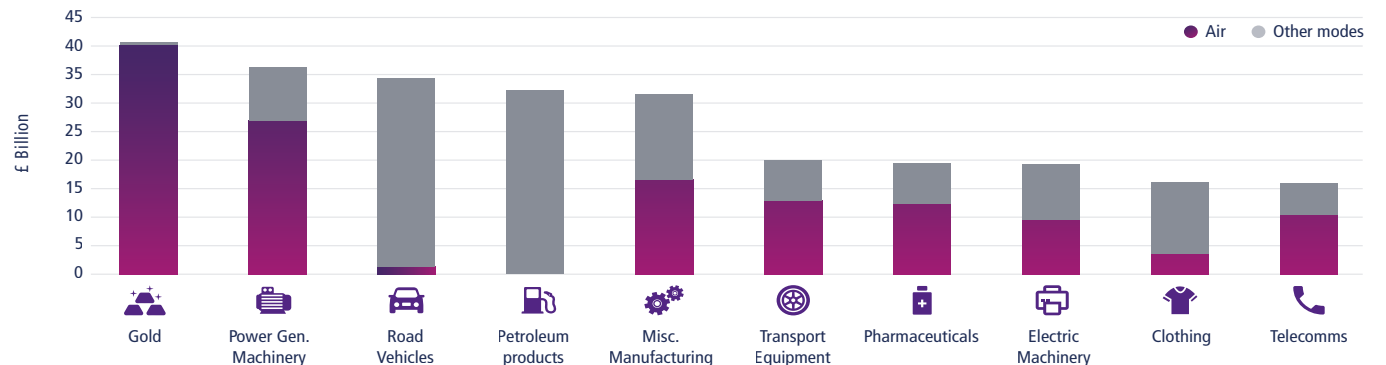
AIR TRANSPORT'S SHARE OF TOTAL EXPORT AND IMPORT VALUE, BILLION (2017)



Source: HMRC



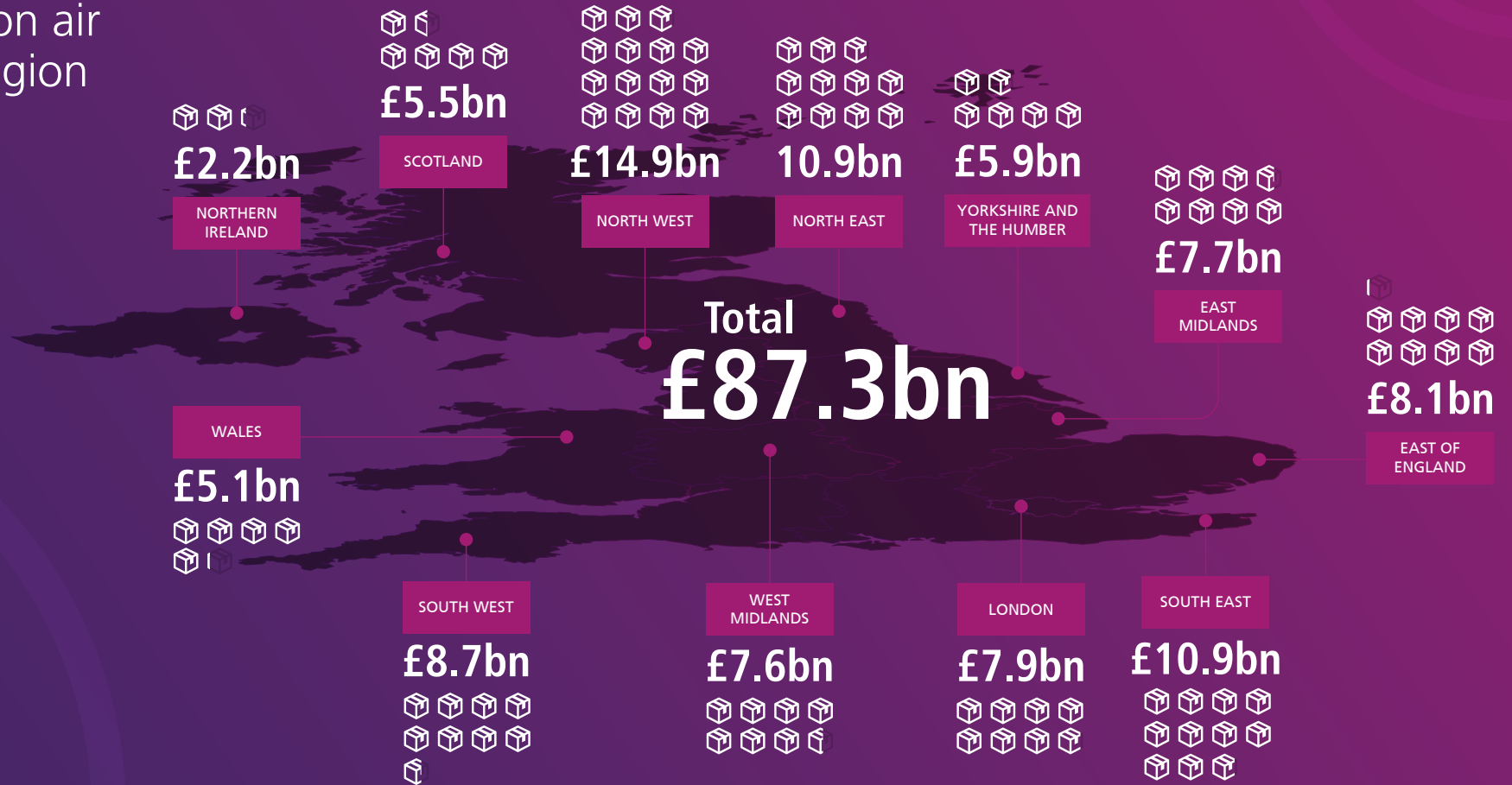
HEATHROW EXPORTS BY PRODUCT (£BN, 2017)*



Source: HMRC

*Each product category was identified by breaking down trade sector categories to the 2-digit Standard International Trade Classification (SITC) code level.

GVA currently dependent on air freight by region



Source: ONS, HMRC, Eurostat, CAA, Steer analysis, 2016 values and prices.

Heathrow's role in exports

As the UK's largest port by value, Heathrow plays a critical role in enabling UK exports and future export growth.

In 2022, the value of exports from Heathrow was £116.8 billion¹⁸. The airport accounted for 95% by value, and around two-thirds by weight, of total UK air cargo exports.

In addition to exporting the greatest quantity of exports in sheer tonnage terms, we fly out roughly 30% of the UK's total export value¹⁹. Our exports are also worth more per kilo than those from other UK airports – around 10% higher according to analysis by CEBR²⁰.

According to DBT data²¹, Heathrow's three most valuable exports in 2022 were gold, medicines and parts of turbo-jet engines or propellants. Heathrow alone facilitates 52% of UK exports of medical and pharmaceutical products, 48% of the nation's scientific-equipment exports, 38% of power-generating-machinery exports and 33% of transport-equipment exports²².

In 2022, we flew out engine parts worth £7.5 billion, scientific equipment worth £3.5 billion and industrial machinery worth £3.1 billion²³. We also play an essential role in the export of gold, a fundamental feature of the UK's role in the global financial system.

CARGO EXPORTS BY AIRPORT, 2022 (000S TONNES)



Source: CAA



All this trade is good for the region surrounding Heathrow and for the wider economy. The benefit is especially strong in the Midlands, Wales and North East of England, three areas in which these manufacturing sectors are at the core of regional economic growth.

Heathrow is key to accessing global growth markets

One aspect that should not be overlooked is the role that Heathrow plays in facilitating exports with non-EU trade partners.

While the EU is, and will remain, a key trading partner for the UK, emerging markets are forecast to dominate the world's top-10 economies in 2050. India will take second place within that 2050 ranking; Indonesia, fourth; Brazil, fifth; and Mexico, seventh²⁴. Over the next few years, 90% of global economic growth will come from outside the EU²⁵. It will come from the great economies of tomorrow that will be key trading partners for the UK to embrace.

PRODUCTS PASSING THROUGH HEATHROW (2019)		EXPORTS	IMPORTS	TRADE
	Live animals	57%	25%	51%
	Medicinal and pharmaceutical products	52%	40%	49%
	Professional, scientific, controlling instruments, apparatus	48%	35%	43%
	Power generating machinery and equipment	38%	39%	39%
	Rail, aircraft and ship transport equipment	33%	24%	29%
	Crude animals and vegetable materials	24%	25%	25%
	Dairy products and birds' eggs	16%	28%	17%

Source: UK Trade Info (HMRC), Cebr analysis

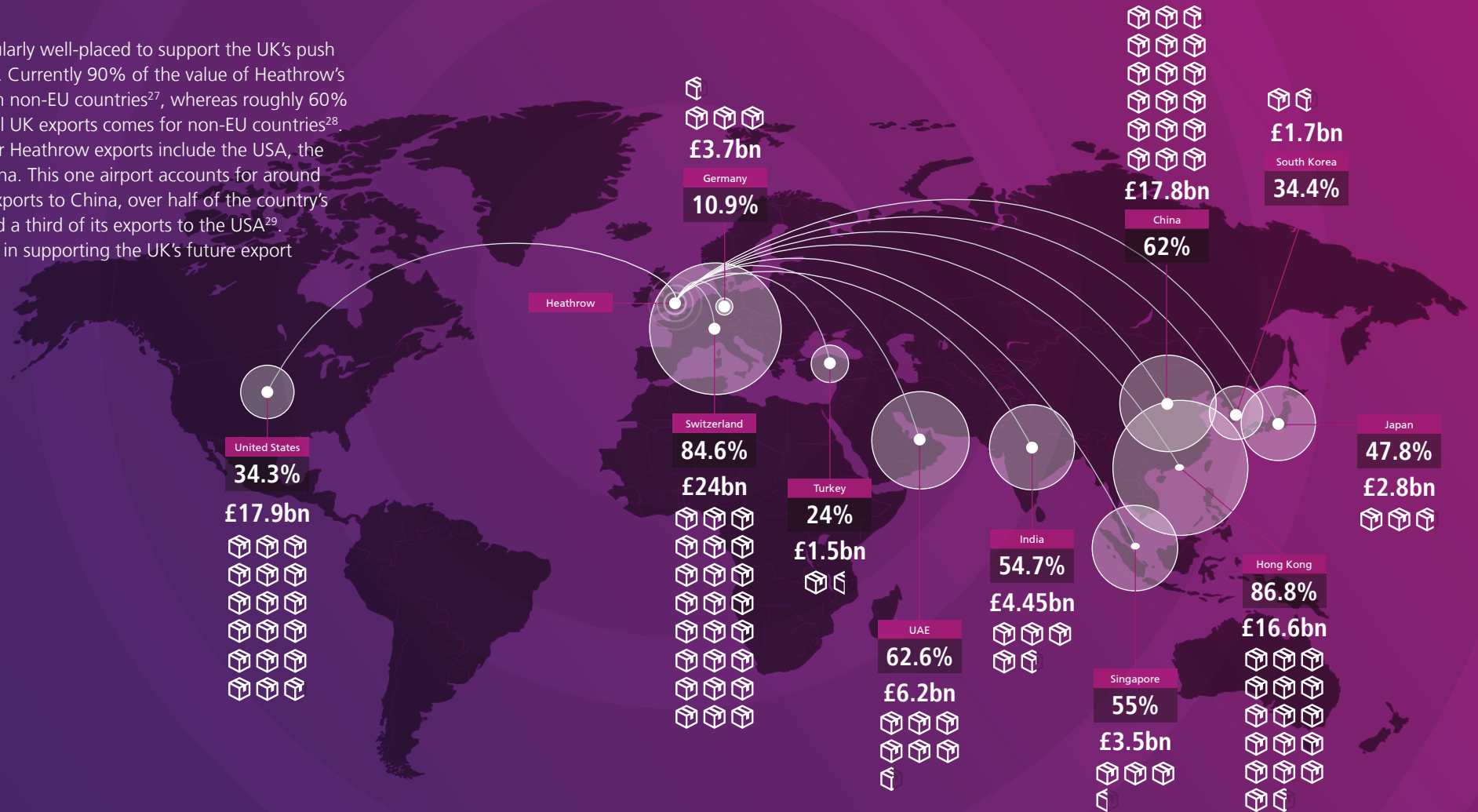
CARGO EXPORTS BY AIRPORT AND REGIONAL DESTINATION, 2022 (000s TONNES)



Source: CAA²⁶



Heathrow is particularly well-placed to support the UK's push for non-EU exports. Currently 90% of the value of Heathrow's exports comes from non-EU countries²⁷, whereas roughly 60% of the value of total UK exports comes from non-EU countries²⁸. Key destinations for Heathrow exports include the USA, the UAE, India and China. This one airport accounts for around two-thirds of UK exports to China, over half of the country's exports to India and a third of its exports to the USA²⁹. We play a vital role in supporting the UK's future export growth potential.



Source: UKTI³⁰



RANK	PRODUCT	HEATHROW EXPORTS (£BN) 2022
1	 Gold and gold coin not of legal tender	58.7
2	 Silver, platinum and other metals of the platinum group	9.5
3	 Non-electric engines and motors, or intermediate parts	7.3
4	 Scientific equipment and appliances	3.6
5	 Industrial machinery, parts and equipment	3.2
6	 Electric machinery and appliances	2.6
7	 Telecoms and sound-recording and reproducing appliances and equipment	1.8
8	 Other transport equipment	1.8
9	 Office machines	1.1
10	 Machinery specialised for particular industries	1.0
11	 Road vehicles (including air-cushion vehicles)	0.9
12	 Internal combustion piston engines and intermediate parts	0.3
13	 Metalworking machinery	0.1

Source: UKTI³¹

Exporting Excellence – our plan for growth

This report shows how critical exports are for the UK's economic recovery. But we believe the UK can go further.

During September 2023 we travelled around the regions and nations of the UK to understand the challenges businesses face, and to explore ways to further boost UK export activity.

The exporters we spoke to highlighted the issues that they want policymakers to review and improve:

- **Driving demand for sustainable exporting**

Businesses understand the need to decarbonise. Many are already investing in decarbonising their operations but are looking to Government to provide greater certainty about the ways and means to cut emissions from their exporting activities. Within this context, freight forwarders – the companies many exporters rely on to ship their goods – could have a significant role to play by creating opportunities for companies to cut the emissions of their exports. One potential route would be to make it easier for exporting businesses to commission freight forwarders that use SAF when carrying their cargo.

“ I would prefer to use more sustainable mechanisms for exporting, but ultimately the bottom line wins out.”

North East Roundtable participant

- **Simplifying and modernising customs processes**

Following the UK's departure from the European Union, many businesses have found managing complex new processes and procedures challenging. They face a considerable amount of additional paperwork and must devote more staff time to ensure compliance with new rules. At the same time, delays in getting goods away affect their cash flow.

“ I've had to hire staff just to manage the new forms we need to fill in.”

Cardiff Roundtable participant

- **Providing skilled exporters**

Exporting can be a complex, resource-intensive activity. But the nation faces a critical shortage of people with the skills to manage compliance and the logistics of export. The complexities – and the lack of skilled staff – are often a barrier that holds potential exporters back. Some businesses are taking unilateral action to overcome the shortage by training their staff or setting up their own academies. Even so, exporting continues to be unattractive as a career.

“ We've now started creating our own skills development [initiative]. This is because the training that we feel is sufficient to help us grow, does not exist.”

Glasgow Roundtable participant

Following these roundtables, we devised a package of measures that will help tackle the challenges that businesses have identified. They have the potential to drive growth in every UK region that Heathrow serves.

Putting sustainability at the heart of trade and export policy

“ We don't believe we can really develop a fully sustainable export policy without addressing [the effects of air travel] head on.”

Cornwall Roundtable participant

Delivering net zero in the exports sector means reducing operational emissions from businesses that export, and tackling emissions from the transport methods that send those exports overseas. UK businesses, including those we spoke to, are working hard to reduce their operational emissions because they know that their customers expect more sustainable practices.

Aviation is vital for exporting businesses. Air cargo moves British goods quickly and safely to international customers. But those benefits cannot come at any cost.

Heathrow's goal is clear: to protect the benefits of aviation for the future, we must take carbon out of flying. So we're doing all that we can to reduce the environmental impact of UK exports. On the ground at the airport, we will cut carbon by at least 45% by 2030. All conventional vehicles that we own will be zero emissions by the end of the decade, and we are busy decarbonising our buildings and infrastructure.

In the air around Heathrow, our goal is to cut carbon by 15% by 2030. By the end of the decade, and with the necessary support from government and industry, we aim to get airlines using 11% SAF at Heathrow. We've already begun by using our landing-charge system to incentivise airlines to take up SAF.

The Government is also helping to make this happen. It plans to implement a mandate on fuel providers to ensure that at least 10% of fuel sold to airlines in the UK is SAF – an approach that Heathrow supports. The downside is that much of this SAF is likely to be imported, which puts up the cost. Imported SAF will do little to help businesses that need to export sustainably and cost-effectively.

There is a solution.

The UK has a legacy of aviation innovation and engineering, and considerable access to SAF feedstocks such as municipal waste. We can make SAF here in the UK and earn a significant economic benefit. A UK SAF industry could create over 10,000 jobs and contribute £1.8 billion of GVA to the UK by 2030. By 2050, these benefits may well rise to 60,000 jobs and over £10 billion of GVA.

To get the finance they need to build plants at scale, investors need certainty about their revenues – just as offshore wind developers do. So we think a good way forward is to implement a revenue-certainty mechanism for British SAF producers. We welcome the Government's commitment to consulting on a mechanism in the next six months. We do need to move fast though because the UK risks missing out on investment opportunities if it does not act, and act quickly.

A mechanism to foster SAF investment will improve affordability for exporting businesses that want to decarbonise the goods they export via air cargo.

Businesses in our roundtables explicitly called for further Government support to export sustainably, and we believe that this mechanism is the right next step. But it must be delivered at pace to have the impact we need.

Making the UK the global leader in customs modernisation and digitalisation

“ *You can ship a machine to the USA with less paperwork than sending a machine to Paris.* ”

Liverpool Roundtable participant

Exporting goods requires a stack of paperwork. In 2022 traders submitted 95.1 million customs declarations³². To get their goods out of the country, exporters must complete – as a minimum – an export declaration, a commercial invoice and a consignment note. An export-declaration form can be up to 12 pages long. Each additional form requires more resources and adds delays to the process.

The Government estimates that adopting a digital-first system under its Border Target Operating Model could benefit businesses by £190 million on imports alone. Many of these benefits will be unlocked by the UK's Single Trade Window. This is a one-stop shop for exporters and customs officials that provides all the data a consignment needs for crossing the border. It reduces the need to reinput the same information on every form, and it cuts the time officials spend ensuring compliance.

A greater push towards an entirely paperless system with a ‘once-and-done’ approach to data collection will ease the burden on business. It will make exporting easier and keep down the cost for overseas customers. The price customers pay will no longer be inflated by regulation.

A further focus should be on extracting required customs data directly from supply chains, eliminating even more requirements for compliance. This was the idea behind Government pilots for a proposed ‘ecosystem of trust’ model. In this model, border agencies would scrape data across a trader's supply chain so that much of the regulatory burden can be fulfilled automatically. Unfortunately, the pilots found that large chunks of industry are not yet ready for this technological solution.

If exporters were to reach the point where they can participate in an ecosystem of trust, it would unlock a more streamlined approach to exporting, and support ease of trade through Heathrow. Our roundtables found that many exporters regard the concept of digitalisation as a burden rather than an opportunity.

“ *When customs change, the systems change as well. So we've got a new system, which changes again. More staff are required to support this compliance.* ”

Liverpool Roundtable participant

Other measures to enable greater participation in a lighter-touch system include removing needless barriers such as rescreening previously scanned air cargo. Screening is relevant to connecting cargo, which is critical in helping to make long-haul destinations viable. Hub airports work by pooling passenger and cargo demand for less popular destinations. The benefits of unlocking more routes combine with the business need for exports to those hard-to-reach destinations to give the UK an economic advantage. The country gains regular access to emerging economies and more frequent flights to the world's leading markets.

Under long-standing Department for Transport rules (set out in the Single Consolidated Direction), all air cargo that arrives at a UK airport via a secure road vehicle – either as a consignment directly from Europe or through Europe from global markets further afield – must be rescreened before its connecting flight in the UK. The rules take no account of the fact that the consignment will have been security screened once before at its origin and secured by tamper-evident means.

Government should simplify things by providing exemptions from the need to rescreen transiting air cargo that has been securely trucked to UK airports. It would make the process smoother and more efficient at the border.

Case Study

DHL Express – London Heathrow co-loader pilot

As a leading facilitator of international trade, DHL Express operates in over 220 countries and territories, connecting UK businesses to markets across the globe. Time Definite International (TDI) services are the core of the business and play a pivotal role in enabling UK businesses to trade internationally. DHL Express provides services for business-to-business shippers and for e-commerce retailers delivering directly to international consumers. The types of shipments transported range from critical medical supplies, pharmaceutical products or life sciences samples, to manufacturing components, financial or legal documentation and luxury fashion garments.

For DHL Express, London Heathrow airport plays an important role in providing commercial air connections. Ensuring UK ports and airports have effective and efficient customs and border processes is critical to the swift movement of goods in to and out of the country.

In 2023 DHL Express launched a 'co-loader pilot' designed to simplify airfreight export customs process at Heathrow airport working with HMRC, Border Force, Heathrow Airport and commercial airlines. The pilot removes the requirement

to process export shipments at control posts outside the airport perimeter, significantly cutting down the time taken to complete the required export procedures. Processing the goods directly through the DHL facility means goods can be loaded directly from the facility onto flights without having to go off airport. To date the pilot has resulted in a saving of 45 minutes per movement, allowing DHL customers to have later cut-off times for their goods. The pilot is also helping to reduce congestion and road emissions around the airport as the shipments no longer have to travel out of the airport by road to be moved back in.

As the pilot grows to encompass more flights, the positive impact is expected to grow. The connectivity provided through commercial flights at Heathrow Airport enables DHL Express to directly connect and facilitate trade with more than 65 destinations around the globe. Customs modernisation at Heathrow airport will enable us to better service our customers and support UK trade grow. Our operations at Heathrow airport are a key part of Express' network, which also includes our own flights from several UK based airports, connecting directly to the DHL global network. Globally, the DHL Express network consists of 320 dedicated aircraft with more than 2,300 flights per day.



Getting export skills to take-off

“ We’ve now started our own customs skills training; the only external training we could find didn’t meet our needs.”

Glasgow Roundtable participant

We will not deliver on the UK’s potential if we do not have the right mix of skills to handle the complexities of compliance and logistics.

During our tour of the UK, we came across excellent examples of initiatives being developed to tackle the export skills shortage. All of them are driven by businesses themselves or by supporting institutes.

SPOTLIGHT

KC Group Shipping

KC Group Shipping is a global logistics provider based in Scotland. The company saw that there was a huge gap in tailored training for those new to the industry and for seasoned freight forwarders. So the company took the initiative by establishing its own KC Learning and Development Hub to increase industry knowledge and raise operational standards. The Hub facilitates self-paced learning and instructor-led training within a classroom setting.

Feedback from learners has been enthusiastic, reinforcing KC’s belief in the power of education to transform the industry. The Hub’s library of courses is continually expanding, with topics tailored to current trends and regulations in the logistics sector.



“ I am incredibly proud of what we’ve accomplished with the Learning and Development Hub. It’s truly heartening to see it making a tangible difference within KC and across the industry. Education is the cornerstone of excellence in logistics, and I am passionate about continuing to foster knowledge and efficiency among freight forwarders, our valued clients, and crucial logistics hubs such as Heathrow airport. Our commitment and appetite to learning is evident throughout everything KC Group Shipping do, and we anticipate that this will only strengthen the industry as a whole.”

David Milne, Managing Director, KC Group Shipping, Scotland

SPOTLIGHT

Heathrow Employment & Skills Academy

As the UK's largest single-site employer, Heathrow has a unique role to play in connecting applicants to jobs, opportunities, training and the world of work. Local residents are a particular focus for the airport because they make up a significant proportion of the workforce.

The airport's own Employment & Skills Academy plays a central role in upskilling local job-seekers and colleagues across the airport. It provides them with access to careers information, advice and guidance; essential skills workshops; as well as job fairs and open days. The Academy also provides job-brokerage support by matching a job-seeker's skills and experiences with opportunities at top brands operating at Heathrow and with businesses within the airport's £188 billion supply chain.

The Academy also has two apprenticeship routes that give job-seekers a chance to start a career in one of the many sectors that operate at Heathrow, including retail, hospitality, cargo and logistics, facilities, and construction and engineering.

Through the Academy and apprenticeship schemes, Heathrow has, in the past two years, upskilled and found careers for over 1,400 colleagues in airport roles supporting passengers and cargo.



All six roundtables showed that local chambers of commerce truly are the voice of business in their own regions or nations. Because the chambers know the scale and range of their members – and their exporting needs and challenges – they were easily able to facilitate discussions and provide appropriate help.

For example, chambers such as Glasgow^{33,34} and the North East³⁵ have produced and circulated materials for their members on how to prepare themselves to export. And they regularly host workshops to answer any questions members may have.

Chambers also coordinate with other stakeholders. In Wales, for example, there are clear routes for engagement: the Institute of Exports helped exporters with the digitisation aspect of trade, while the Chamber, DBT and Welsh Government worked together to support exporters and maximise growth opportunities.

“ ... if you want to export, where do you go? Who's going to give you the best advice? And then who's going to make the process easier for you? At present, chambers best facilitate this.”

Wales Roundtable participant

There's a consensus that the country needs to go further. A key theme from our roundtables was the challenge many businesses face in securing staff with the right skills and experience to deal with new markets and increased international trade, or the added customs burden that often goes with them.

The UK needs a national campaign to highlight the potential a career in exports could offer job-seekers and people leaving education. A campaign would combine the efforts of industry, the Government and business groups to encourage more people to join the sector. It would be a powerful lever to help businesses attract the right skills and talent.

Local chambers of commerce would have a big role to play within such a campaign by continuing to provide their excellent work programmes on trade. The chambers could help shape what each business community needs, and co-ordinate efforts at training and engagement.

There are multiple potential delivery mechanisms for this campaign. They include careers advice for school leavers, advertising and specific courses in FE colleges, and a joint programme between the DBT, HMRC and the Department for Education to deliver the skills mix that a coalition of industry and national and local government identifies as necessary.

“*There’s a missing link between the skills business needs in this space and the various tiers of education.*”

Glasgow Roundtable participant

Calling for young people to join the sector – or encouraging older people to consider a career switch to exports – is a bigger project than simply making it easier for businesses to sell abroad. It’s about creating a new cohort of professionals who will make international trade a globally aspirational career path.



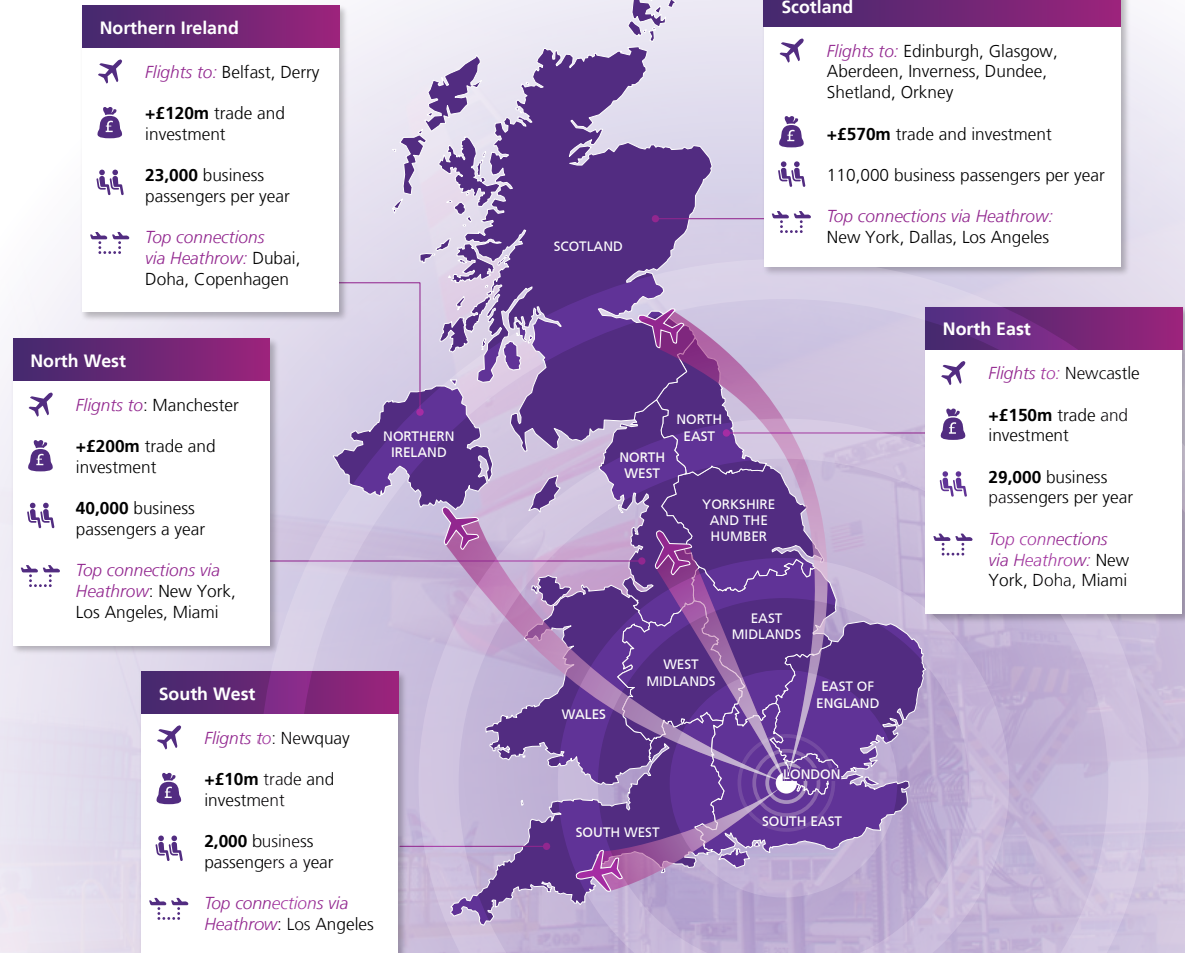
Connecting the whole of the UK to global growth

The importance of domestic connectivity

Heathrow's domestic route network is a vital economic link for the UK regions and nations. Each year more than three million domestic passengers travel via Heathrow³⁶.

Our domestic network continues to grow with the recent addition of flights to Derry, Dundee, Orkney and Shetland. With connections to 15 UK airports, supported by our domestic charging discount, Heathrow gives the nation's businesses and passengers access to global markets and the rest of the UK.

These connections create growth, jobs and opportunity well beyond the airport's own neighbourhood. For example, in 2019, business passengers flying on one-stop connections to and from the North East via Heathrow generated more than £150 million in trade and investment, while Scotland benefitted by more than £570m³⁷.



Regional connectivity in action

Heathrow has spoken to businesses across the UK regions and nations to hear first-hand how exporters benefit from the airport's connectivity.

During September, we worked in coordination with the British Chamber of Commerce and regional chambers to host businesses at the following regional and national chambers of commerce:


















- 1 Glasgow Chamber of Commerce, Glasgow (Scotland)
- 2 Chamber Wales, Cardiff (Wales)
- 3 Liverpool Chamber of Commerce, Liverpool (North West)
- 4 Northern Ireland Chamber of Commerce, Belfast (Northern Ireland)
- 5 North East Chamber of Commerce, Durham (North East)
- 6 Cornwall Chamber of Commerce, Cornwall (South West)



The organisations we spoke to, from jam-makers in Wales to technology manufacturers in the North East, are the entrepreneurs, family businesses and household names that use the airport's access to global markets and passengers. They tell us that the airport's ability to serve as a global gateway is crucial to the current and future growth of their businesses.

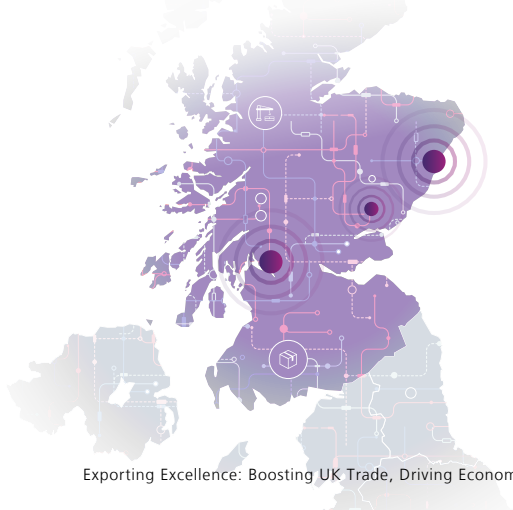


Case studies

- | | | |
|---|--|--|
|  <p>Walker's
Scotland</p> |  <p>Prima Cheese
North East</p> |  <p>Britannia Fire
East of England</p> |
|  <p>Premier Packaging Solutions
Northern Ireland</p> |  <p>Angloco
Yorkshire and the Humber</p> |  <p>Tregothnan Tea
South West</p> |
|  <p>ATG Airports
North West</p> |  <p>Radnor Preserves
Wales</p> |  <p>Ormiston Wire
London</p> |
|  <p>Stratton Tea
North West</p> |  <p>SALTO Systems
West Midlands</p> |  <p>Russell Finex
London</p> |
|  <p>Green Bell Packaging Ltd
North West</p> |  <p>Micro-Mesh Engineering
East Midlands</p> |  <p>LAT Water
South East</p> |
|  <p>Coltraco Ultrasonics
North East</p> |  <p>RISA
East Midlands</p> | |

Scotland

Heathrow's domestic route network continues to link Scotland with economic opportunities across the UK. New routes from Heathrow to Dundee, Orkney and Shetland are building on existing connections to Aberdeen, Edinburgh, Glasgow and Inverness. Heathrow's broad-ranging domestic connectivity creates a bridge between Scotland's economy and global markets. From Edinburgh's financial sector to the whisky distilleries of Speyside, Scottish businesses rely on these connections to compete in the global economy. As a result, over 100,000 business passengers travel to Scotland via Heathrow each year. Their activity generates more than £570 million in trade and investment.



CASE STUDY

Walker's

Walker's is the family-run Scottish baking business best-known for its shortbread. Founded 125 years ago, Walker's now employs well over a thousand people at its bakery in Aberlour, north of the Cairngorms. Overseas sales account for almost half of Walker's business. The company, which exports to more than 100 countries, depends on Heathrow's global connections to reach its international customers. And it's also delighted to have its products on sale within Heathrow's terminals.

“*Heathrow is the best connection for us. We're based in the north of Scotland. We need a central Hub to go anywhere in the world.*”

Nicky Walker
Managing Director, Walker's, Scotland

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
468,000	5.5	78,000	36,314	5,752

Northern Ireland

Northern Ireland's direct route to Heathrow is a vital commercial link to the rest of the UK. From Belfast's shipbuilding heritage to the nation's emerging tech sector, local businesses rely on this thriving connection to access domestic and global markets. Over 300,000 passengers fly between Northern Ireland and Heathrow each year, generating more than £120 million in trade and investment³⁸. Export-led growth is crucial to the nation's economy, supporting 129,000 jobs in Northern Ireland alone³⁹.



CASE STUDY

Premier Packaging Solutions

Premier Packaging Solutions specialises in quality bespoke, plain and printed packaging for various sectors, including the hospitality, patisserie, gift and wholesale industries.

For this Newtownards company, the region's frequent and reliable links to Heathrow have been crucial for success. Using those links, the company has grown its international exports with the potential for expansion into Australasian and African markets.

“ We currently use Heathrow as a hub to the rest of the planet. We export to around 40 countries; Heathrow enables us to quote those jobs with confidence, knowing they're going to get to their destination safely and on time.”

Mark McMahon, Founder and Director,
Premier Packaging Solutions, Northern Ireland

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
129,000	2.2	72,000	9,319	7,708

North West

The North West has been an exporting powerhouse for generations. Home to Liverpool's iconic docks and the cultural hub of Manchester, the region's maritime trade routes are complemented by strong rail and road connections to Heathrow. The region's 11,000-plus exporters create almost £15 billion of GVA each year, with Heathrow passengers generating more than £200 million of additional trade and investment in the North West⁴⁰.

CASE STUDY

ATG Airports

ATG Airports is a leading supplier of airfield ground lighting for the civil and military sectors. ATG, which was founded in 1993 and has its headquarters in Warrington, employs 56 people in the region. The company has worked directly with Heathrow for 25 years, managing the airport's complex lighting systems.

ATG works with airports from Eastern Europe to Asia. To supply its technology to this global customer base, ATG relies on Heathrow's air-freight capacity. The company also uses the airport's domestic and international connections to keep its engineers on the move, maintaining the company's global installations at short notice. ATG has turned connectivity into competitive advantage.

“ Our supply chains extend from the Far East to Eastern Europe. We use air freight to deliver our goods and have developed our relationship with Heathrow over a period of 25 years.”

Andy Sole,
Strategic Development Director, ATG Airports, North West

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
630,000	14.9	52,000	32,713	11,203

North West

CASE STUDY

Stratton Tea

Stratton Tea is primarily engaged in the business of Buying, Blending and repacking tea for export and domestic trading from India and now the UK. Established in 2022, Stratton Tea draws upon a family legacy spanning over 75 years in the tea industry bringing with them experience of the tea trade in India.

Stratton imports tea for distribution to UK manufacturers and exports blended tea products to wholesalers in Europe, Africa, China and the Middle East. They rely on Heathrow's unparalleled connections to reach to global markets across the world, helping them become a global business focused on trading 'Bush to cup responsibility'.

“ Access to the global markets is vital for the growth of our business, Heathrow is a vital to us to reach new markets across the world enabling us to share and distribute our tea to new people.”

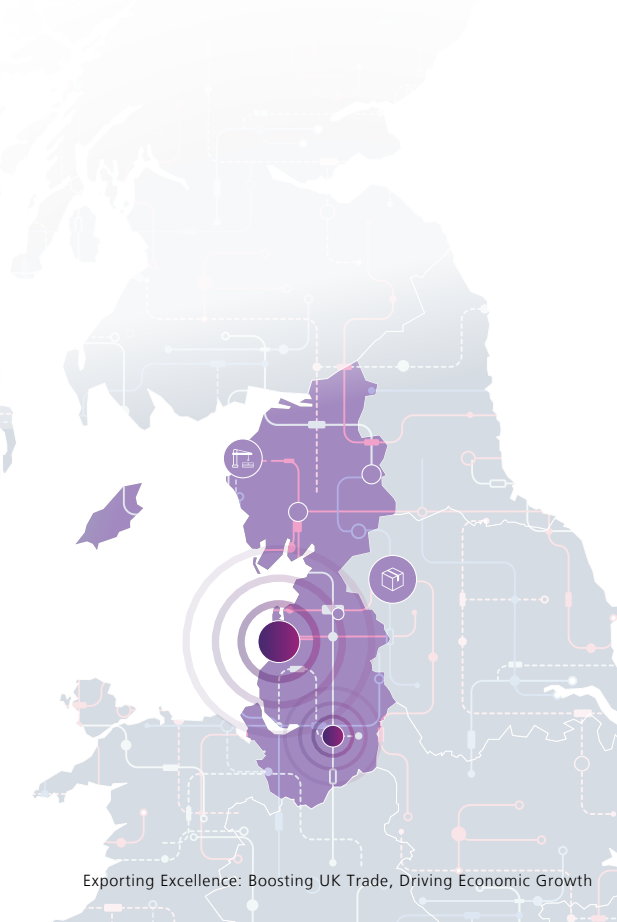
Razi Khan,
Director, Stratton Tea, North West

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
630,000	14.9	52,000	32,713	11,203

North West



CASE STUDY

Green Bell Packaging Ltd

Green Bell Packaging Ltd. is a UK based sustainable packing provider offering a plastic-free, environmentally safe, and affordable packaging option.

Green Bell Packaging Ltd. are passionate about the environment with products reflective of this whilst using the latest manufacturing technology to ensure their products are of the highest quality. It is their mission to produce products that contribute to a global movement of tackling toxic waste, carbon footprint and other pollutants. They rely on Heathrow to enable their services to be accessible across the UK and Europe.

“ Heathrow has been vital for our initial growth, providing access to locations across the UK and Europe. Heathrow continues to be a supportive partner to Green Bell Packaging due to its quick turnaround and direct connectivity.”

Vahid,
CEO and Founder, Green Bell Packaging Ltd, North West

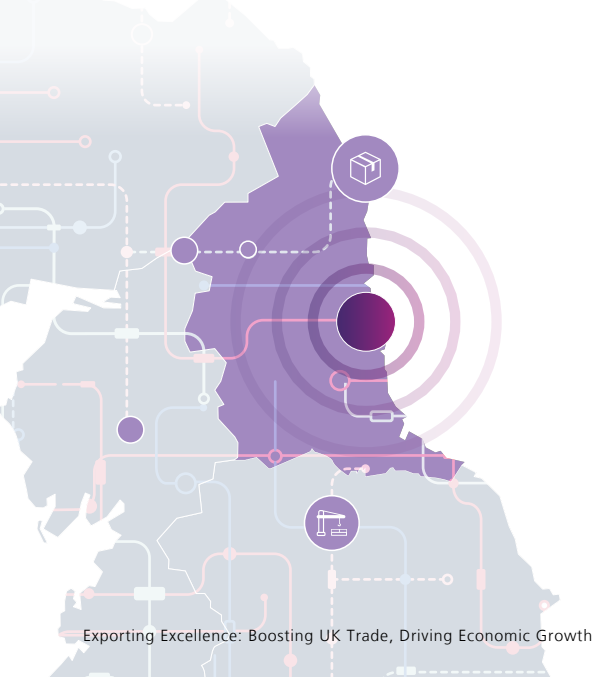
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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
630,000	14.9	52,000	32,713	11,203

North East

The North East has a history of success in manufacturing and innovation. From shipbuilding on the Tyne to advanced engineering in Teesside, the region's continued growth in high-value exports relies on its national and international connectivity via Heathrow. In 2019, 85,000 passengers travelled to the North East via Heathrow. Their entrepreneurialism generated over £150 million in trade and investment⁴¹.



Exporting Excellence: Boosting UK Trade, Driving Economic Growth

CASE STUDY

Coltraco Ultrasonics

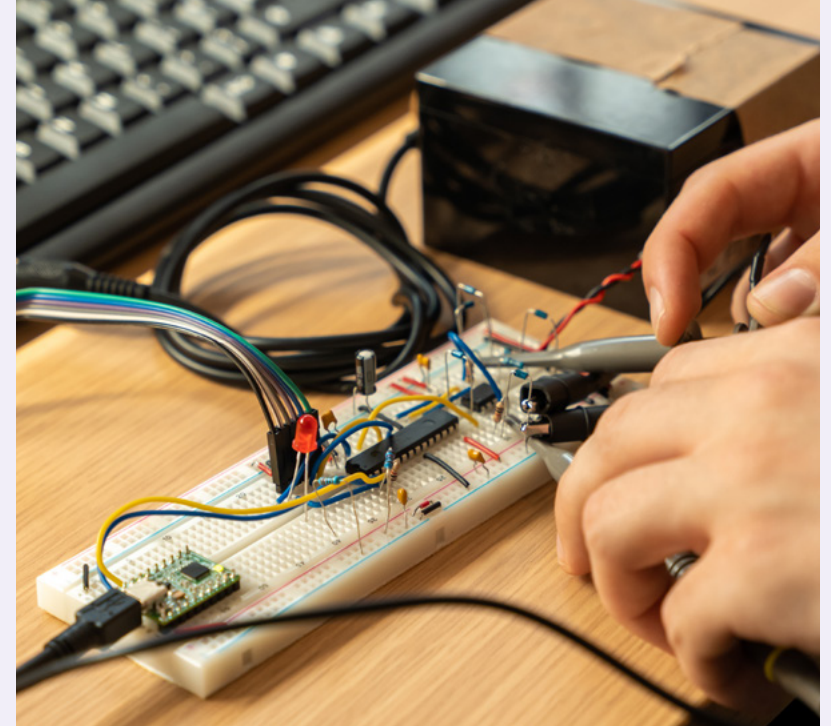
Coltraco Ultrasonics makes advanced technology systems, and relies on Heathrow to rapidly transport its bespoke British technology to customers in over 120 countries.

Thanks to Heathrow's regional connections, Coltraco, which calibrates its technology at its Durham research facility, can fly out exports to international customers within 24 hours. With offices in the North East, South West and London, regional connectivity is at the core of Coltraco's competitive business model.

“ We export 90% of our manufactured output to 120 countries, covering continents including Asia, Europe and the Middle East. We have exported through Heathrow for 30 years as the single most powerful logistic multiplier to our exporting success. Heathrow also played a vital role in Coltraco winning our second Queen's Award for Enterprise in International Trade.”

Professor Carl Stephen Patrick Hunter OBE,
Chairman, Coltraco Ultrasonics, North East

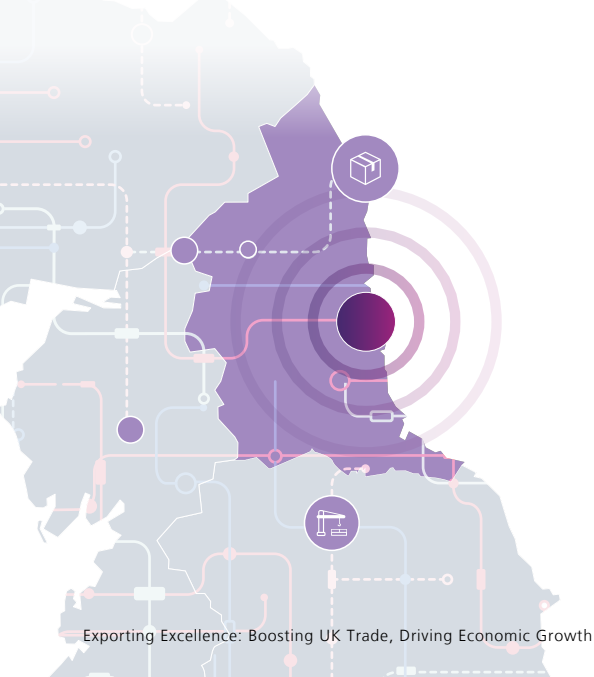
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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
168,000	2.8	77,000	12,974	2,387

North East

The North East has a history of success in manufacturing and innovation. From shipbuilding on the Tyne to advanced engineering in Teesside, the region's continued growth in high-value exports relies on its national and international connectivity via Heathrow. In 2019, 85,000 passengers travelled to the North East via Heathrow. Their entrepreneurialism generated over £150 million in trade and investment⁴².



CASE STUDY

Prima Cheese

Prima Cheese is one of the biggest cheese processors in the UK, a recognised brand in the UK food industry. They are a dairy processing company specialising in cheese used predominantly for the pizza market as well as creating dairy solutions primarily used in the foodservice and food manufacturing markets.

Prima Cheese exports to over 50 countries worldwide, exclusively supplying wholesalers and specialist food service distributors to ensure the best restaurants, takeaways and catering kitchens dairy requirements are met to create a variety of foods.

“ Heathrow's connectivity is an asset to Britain's businesses, providing access to numerous destinations across the world. Heathrow's connectivity has been helpful in supporting our business fulfil urgent requests from our customers.”

Nagma Ebanks Beni MBE,
Co-CEO, Prima Cheese, North East

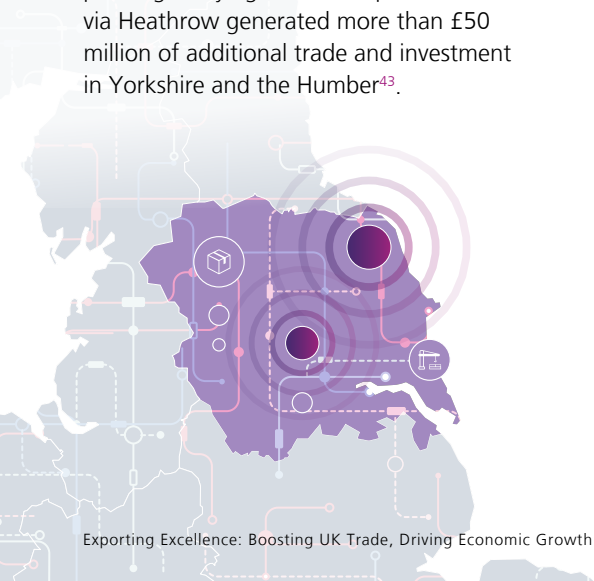
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168,000	2.8	77,000	12,974	2,387

Yorkshire and the Humber

In the wake of the industrial revolution, Yorkshire became the world's largest fabric producer. Its history is embodied in Saltaire, a UNESCO World Heritage Site at Shipley, and in the historic mills found across the region. The textile industry continues to drive the region's export-led growth, with air cargo and passenger connections remaining a vital source of domestic and global connectivity. In 2019, business passengers flying on one-stop connections via Heathrow generated more than £50 million of additional trade and investment in Yorkshire and the Humber⁴³.



CASE STUDY

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Angloco

Angloco has been designing and building special-purpose firefighting and rescue vehicles for over 50 years. The company exports to over 70 countries and provides customer support through a fast-moving team of global service engineers. Angloco dispatches its team of engineers via Heathrow to wherever they're needed, no matter how far. A well-connected and direct transport link to its customers is vital for the business and for serving the communities and livelihoods that its emergency equipment protects.

The company is keen to support industry efforts to increase exports, and has seconded a sector specialist to the Department for International Trade.

“ From a practical point of view, Heathrow airport continues to offer us a gateway for our time critical spare parts and for our sales, service and training teams to visit customers across the globe. One of our latest deliveries was to Grantley Adams International Airport in Barbados, but we certainly haven't turned our back on the home market. Angloco is passionate about the need to improve the UK's export success, and looks forward to continuing its efforts alongside Heathrow, government and industry to do so.”

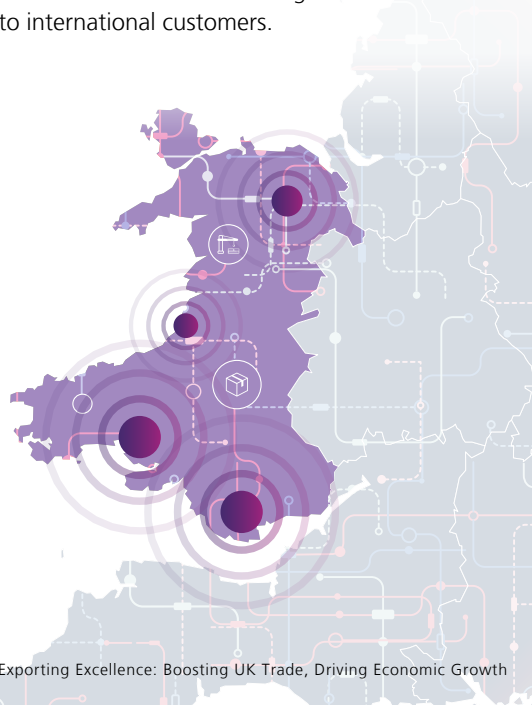
Alistair Brown,
Managing Director, Angloco, Yorkshire and the Humber



Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
418,000	5.9	49,000	20,429	8,426

Wales

From its ancient agricultural roots to a modern aerospace hub that's home to major civil aerospace exporters such as Airbus, Wales serves the world. Welsh exporters pride themselves on their ability to send local produce and manufactured goods to global markets. Using Welsh road and rail connections, the nation's diverse export base relies on Heathrow as a vital global connector to international customers.



CASE STUDY

Radnor Preserves

Award-winning Radnor Preserves of Newtown is one of the world's best artisan marmalade makers. The business uses high-quality ingredients to produce handmade marmalades, preserves and chutneys.

Radnor's international reputation (it won the Double Gold Prize at the World Marmalade Awards in 2015) has enabled it to export fine Welsh produce via Heathrow to a global customer base. Using Heathrow's air-freight capabilities, Radnor can fly samples and orders to international buyers at short notice. The company serves East Asian markets such as Japan and Macau, and had its produce featured at Tokyo's 2022 British Fair. Radnor Preserves are also available in Heathrow's own terminals.

“ Heathrow has the best international connections, so if we need to get samples to people quickly we are able to do that. During COVID, exporting played an essential role in our business growth, and we look forward to continuing to expand our exports with Heathrow's help.”

Joanna Morgan,
Director, Radnor Preserves, Wales

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
196,000	5.1	105,000	20,488	3,194

West Midlands

As the birthplace of the industrial revolution, the West Midlands has been a UK exporting hub for decades. Over 10% of the region's inhabitants work in manufacturing – significantly above the national average⁴⁴. Renowned for its advanced manufacturing and engineering sectors, the region's high-value exports base relies on Heathrow as a global gateway to international markets. European connections through Birmingham Airport are complemented by Heathrow's global route network, enabling West Midlands businesses to reach more distant markets. The HS2 London-to-Birmingham rail link will further improve connectivity, driving export-led growth in Birmingham and the wider region.

CASE STUDY

SALTO Systems

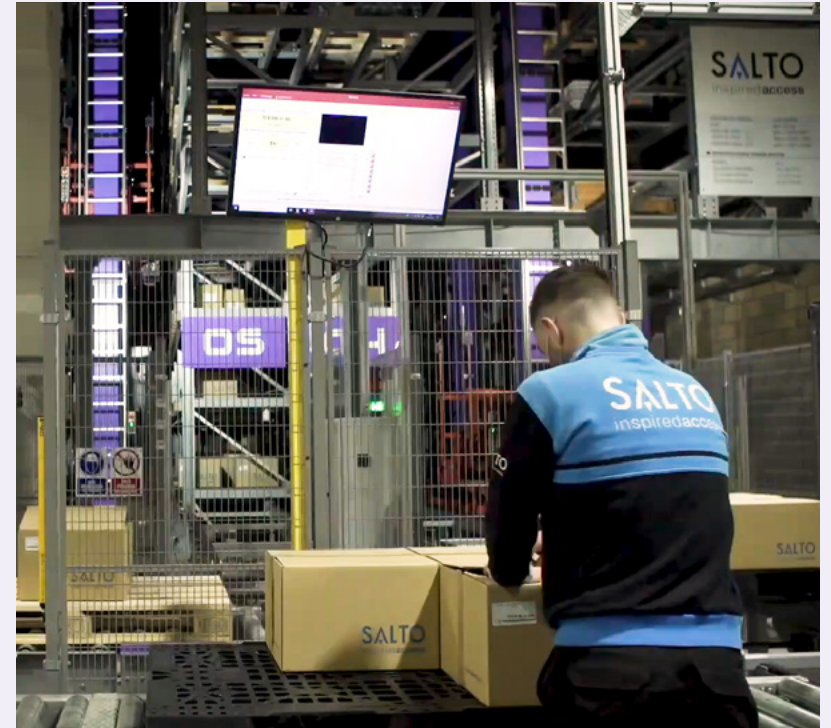
Based in Warwickshire, SALTO Systems develops and manufactures advanced and reliable wireless locking and access-control solutions. Heathrow has helped the company, which is widely recognised as a global market leader, expand its operations throughout the UK and in 90 other countries.

As well as supplying Heathrow, SALTO has used the airport's cargo capabilities to support global expansion, which now extends to 40,000 projects around the world.

“As a result of our work at Heathrow, we have now expanded into other airports in the UK, Europe and the US.”

Ramesh Gurdev,
Managing Director, SALTO Systems, West Midlands

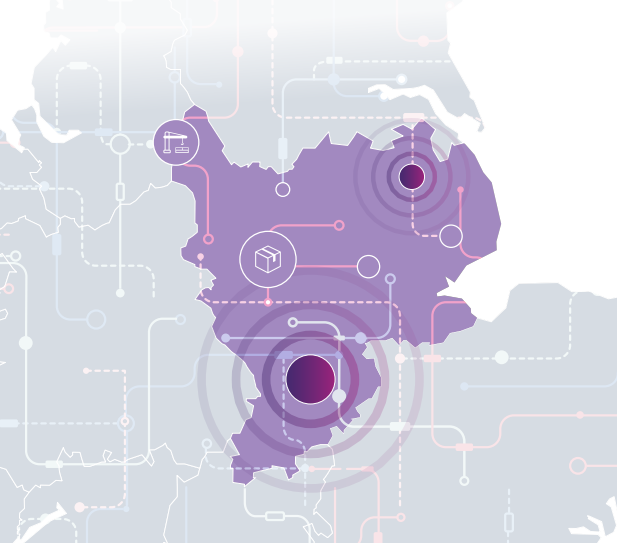
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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
511,000	7.6	59,000	29,945	10,594

East Midlands

Over 12% of the East Midlands working population is employed in manufacturing, a higher proportion than in any other UK region or nation⁴⁵. The region's industrial base relies on rapid access to global markets, with air cargo generating an additional £7.7 billion of economic growth each year. Heathrow's global route network extends the connections offered by East Midlands airport. Heathrow increases the connectivity of the region's 8,000 exporters to drive up exports while boosting regional development⁴⁶.



CASE STUDY

Micro-Mesh Engineering

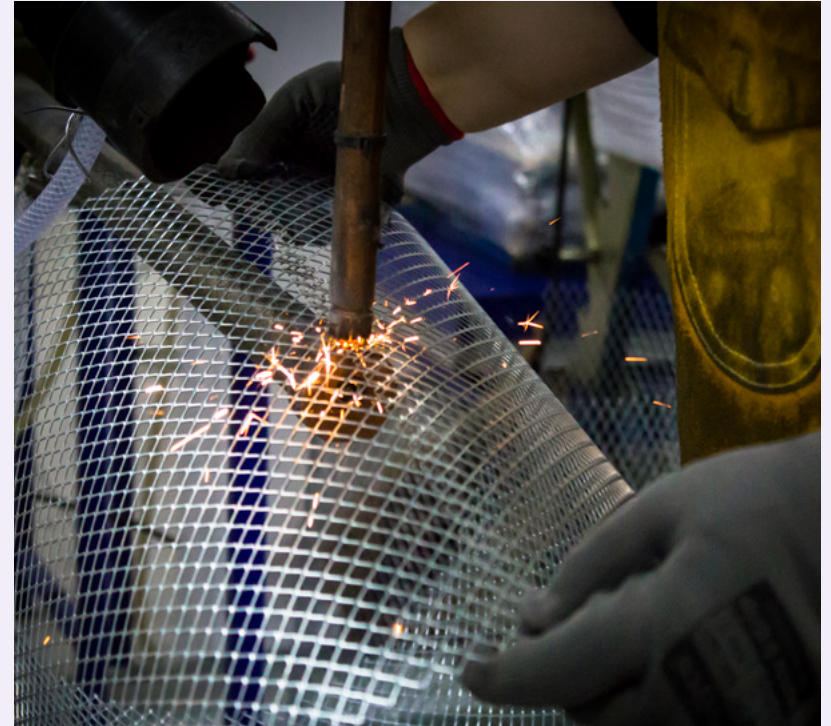
Micro-Mesh Engineering is one the UK's largest producers of air-filtration solutions. In 2020 the company founded its online division, FilterFinder. FilterFinder takes its products to global businesses, such as Rolls Royce, Boeing, Ryanair and other household names.

FilterFinder has a global footprint, and now exports to over 60 countries. Heathrow is at the heart of this international logistics operation. It serves as a critical hub, and ensures that FilterFinder products are delivered promptly and efficiently. Heathrow helps to maintain the integrity of customer supply chains and the company's reputation for reliability.

“ For us Heathrow is a key part in maintaining our global presence. It's our bridge to the rest of the world and our customers overseas, not just in transporting our cargo but our people too. Heathrow has been instrumental in helping grow our business globally.”

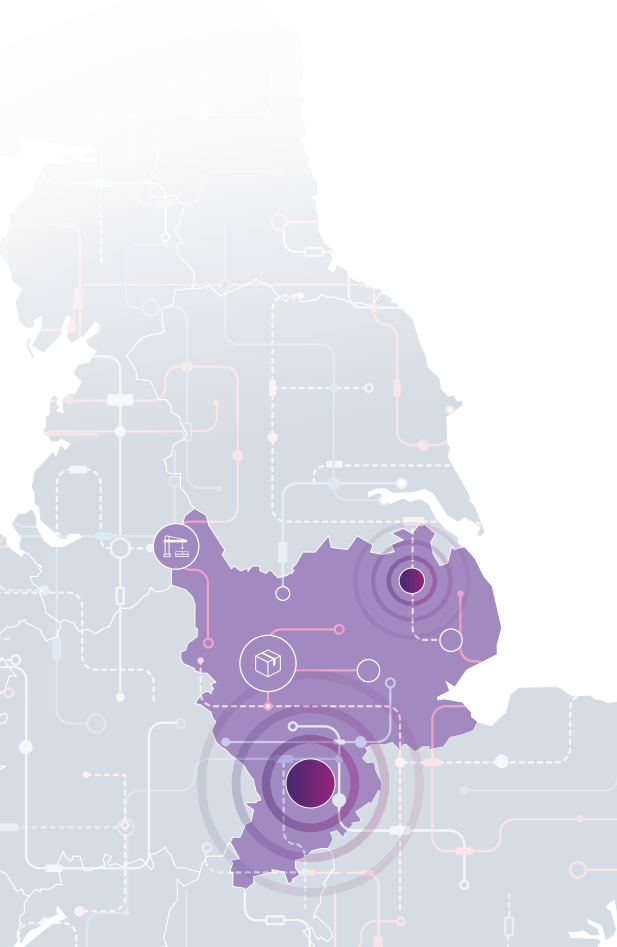
Elliott Underwood
Head of Online Sales, Micro-Mesh Engineering, East Midlands

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
384,000	7.7	63,000	24,211	8,817

East Midlands



CASE STUDY

RISA

Founded in 2001, British-owned RISA is an award-winning international freight forwarder, based in the East Midlands.

RISA serves businesses across the UK by collecting their export goods, then splitting and consolidating into bigger consignments destined for major global cities. The speed and reliability of Heathrow means that high-value goods reach their destinations swiftly and securely. Its infrastructure allows RISA to fly out urgent orders separately for even faster deliveries.

Heathrow is the backbone of RISA's airfreight business, facilitating global exports and growth for its clients.

“ London Heathrow's strategic location serves as the backbone of RISA's airfreight business, facilitating global expansion for its clients.”

Sara Hutchinson
Managing Director, RISA, East Midlands

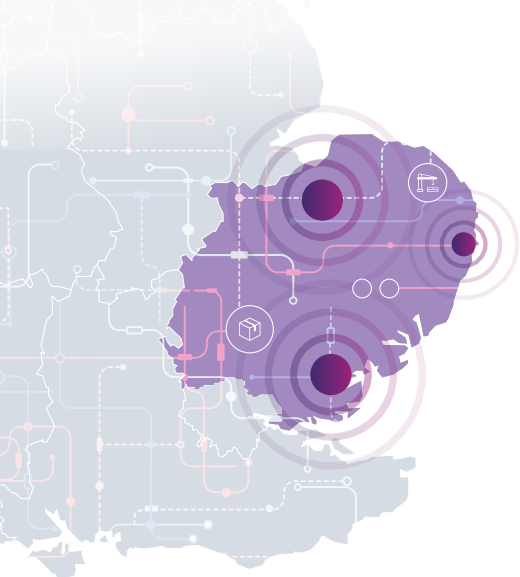
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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
384,000	7.7	63,000	24,211	8,817

East of England

The East of England's economic growth has been supported by its ability to export local produce, expertise and advanced technology through Heathrow. Securing the region's export-led growth into the future depends on the continuing success of its world-leading renewables and life-sciences industries. Heathrow's international connections are vital for supporting regional export growth for all businesses from Cambridge's thriving start-up sector to Norfolk's agricultural producers.



Exporting Excellence: Boosting UK Trade, Driving Economic Growth

CASE STUDY

Britannia Fire

Britannia Fire is an independent fire-extinguisher manufacturing company founded in Ashwellthorpe, Norfolk in the 1970s. Founder and Managing Director Roger Carr is proud of the company's East of England heritage. The company continues to produce its extinguishers on the outskirts of Norwich, and to export its innovative British technology through Heathrow to some of the world's fastest growing international markets.

“ Heathrow's success is important to us because it gives us the opportunity to get our products worldwide. We sell in places like India, Malaysia; it all goes through Heathrow. Culturally, The Hub is important to our business.”

Roger Carr,
Founder and Managing Director, Britannia Fire, East of England

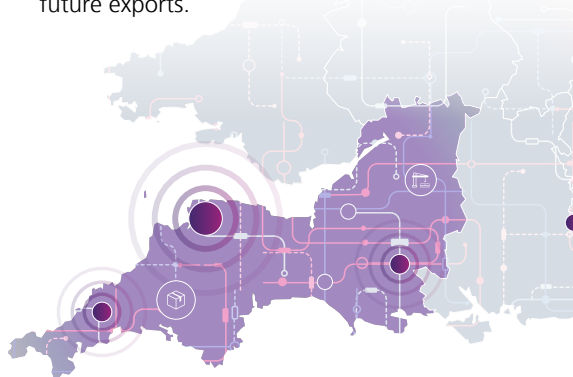
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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
563,000	8.1	59,000	33,268	11,998

South West

The South West has a proud heritage of British exporting excellence. From the art pottery of Torquay to the shipbuilding of Appledore, exports support over 430,000 jobs in the region, creating £8.7 billion of value⁴⁷. In 2019, the 6,000 passengers flying to and from the South West via Heathrow generated more than £10 million in trade and investment while spending £3 million in the region⁴⁸. Looking ahead, Cornwall's abundance of high-grade lithium could supply up to two-thirds of Britain's lithium needs. This industry – and a growing spaceflight sector – will rely on Heathrow's global connectivity to power the region's future exports.



CASE STUDY

Tregothnan Tea

Tregothnan Tea planted the UK's first tea garden, yielding the country's first home-grown tea in 2005. Fifteen years later, it has become Europe's largest tea garden, with over 20,000 tea bushes planted each year.

Tregothnan exports its produce to over 50 countries, and more than 100 countries have at some time bought Tregothnan tea. The business relies on Heathrow for its global reach and connections with the rest of the world – and its supply chains also look overseas for mechanical support and expertise.

“ Heathrow is a vital link to any small or medium-size business in the UK. We use them heavily for bringing customers, but also exporting tea or high-value products alongside passengers. Heathrow has fulfilled a big part of us becoming the largest tea garden in Europe, exporting fine English tea to the world and hosting tea connoisseurs in Cornwall from all over the world. The connection from Heathrow to Cornwall allows us to make the UK tea centre truly international.”

Jonathon Jones OBE,
Managing Director of Trading, Tregothnan Tea, South West

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters per region
430,000 ⁴⁹	8.7 ⁵⁰	54,000 ⁵¹	23,408 ⁵²	9,325 ⁵³

London

London is the epicentre of global trade and finance – and a major player in fuelling export-led growth. From the City's financial prowess to family businesses that have passed down through generations, London and Heathrow are economically intertwined. With over 22,000 exporting businesses located in London, export-fuelled industries support a staggering 1.7 million jobs in the capital⁵⁴. As London's largest airport, the connectivity we offer to family-run and global businesses is a vital part of the UK's ability to function as a hub for international trade.

CASE STUDY

Ormiston Wire

Ormiston Wire is a specialist metal wire manufacturing company located in Isleworth, West London. Founded in 1793, the family-run business supplies wire for a variety of applications ranging from military uses to abstract art.

Ormiston Wire is so near to Heathrow, it has the world market on its doorstep. The company thrives on fast and efficient logistics made possible by its local carriers, including Heathrow.

“ Heathrow actually give us information about the airport and how we can use them from a trade point of view to make our business more efficient. It opens a door for us to do more exports to customers worldwide.”

Mark Ormiston,
Managing Director, Ormiston Wire, London

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
1,717,000	7.9	27,000	46,633	22,479

London

CASE STUDY

Russell Finex

Founded over 85 years ago, and employing over 250 people in Feltham, Russell Finex is a global leader in fine-mesh technology. Using Heathrow's extensive cargo connections, Russell Finex exports its custom-made British technology to over 140 countries worldwide.

The business relies on its nearness to Heathrow to gain competitive access to major international markets. These connections have spurred investment in its factory, which continues to boost the local economy and bring highly skilled talent to the area.

“ *Being close to Heathrow, we can move our products quickly and efficiently, once they're made, to the airport and then to any part of the world.* ”

Ray Singh,
Chairman, Russell Finex, London

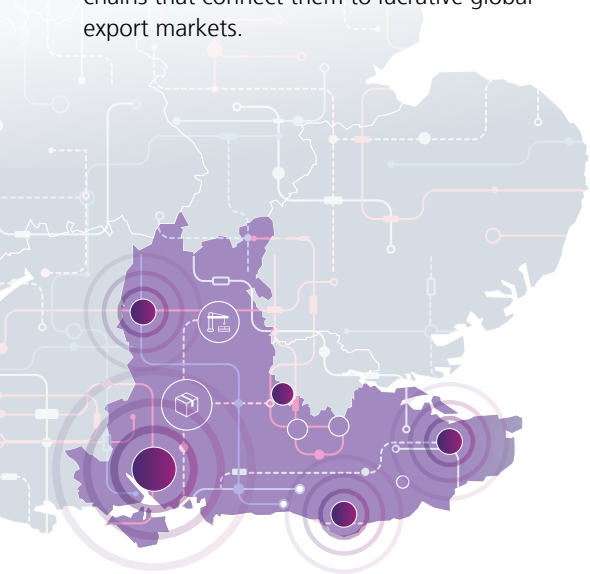
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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
1,717,000	7.9	27,000	46,633	22,479

South East

From wind-turbine manufacturers in Portsmouth to vaccine makers in Oxford, the South East has the highest employment rate of any region, attracting more direct foreign investment than any area outside of London⁵⁵. The region's economic activity is underpinned by its proximity to Heathrow. Advanced manufacturers and pharmaceutical companies rely on 24/7 global supply chains that connect them to lucrative global export markets.



CASE STUDY

LAT Water

LAT Water is a Berkshire-based, British technology company at the forefront of developing new approaches to wastewater treatment and desalination. LAT Water operates across the UK and enjoys a global reach with supply chains and customers all over the world.

Heathrow has been critical to LAT Water's success. With domestic partners as far north as Aberdeen and international partners as distant as China, the company needs fast, easy access to all its markets. Which is exactly what it gets through Heathrow.

“ Heathrow is really important as a transport hub for our business. We need the airport's international connectivity to deliver key components and support for our global projects.”

Mark Hardiman
Co-founder and CEO, LAT Water, South East

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Jobs supported by exports per region	GDP/GVA supported by air freight (£ billion)	Value of goods exported per export supported job (£)	Total value of goods exports per region (£ million)	Number of exporters by region
914,000	10.9	48,000	44,040	18,863

Conclusion

Through our Exporting Excellence roundtables, we heard the views of businesses from across the UK's regions and nations. We wanted to understand how best to unlock and support their business potential.

In three vital areas: (1) putting sustainability at the heart of trade and export policy, (2) making the UK the global leader in customs modernisation and digitalisation, and (3) putting incentives in place to get export skills to take-off, we believe a policy framework exists to maximise the UK's strengths and counter its weaknesses.

Exporting Excellence is just the start.

A collective effort is now required between Government, business groups, policymakers and other stakeholders across the aviation and export industries. All parties should work together to strengthen the UK's ability to export, and to provide businesses with the tools and opportunities to export their products and services to global markets.

As the economic importance of exports increases, there are significant opportunities for businesses to capitalise on. Heathrow is ready to help. As the UK's only hub airport it will continue to enable international connectivity and provide access to new and emerging markets.

Find out more

If you have any questions or queries about ways we can work together to unlock opportunities for growing UK exports, or making greater use of Heathrow's global connections, please contact:

Sarah Ralphs,
External Affairs Lead,
sarah.ralphs@heathrow.com



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