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# HEATHROW: SUSTAINABLE GROWTH, GLOBAL CONNECTIVITY

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Heathrow

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# 1. Foreword

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For more than a century, the UK has been a world leader in aviation. From the first transatlantic flight to the development of supersonic travel with the Concorde, the country has led the way in innovations and technology.

As an island nation, aviation has enabled the UK to enjoy unrivalled connectivity with global destinations, benefitting businesses and passengers from every corner of the UK, and at its heart sits Heathrow.

81 million passengers and £188 billion worth of cargo a year passed through our airport before the pandemic. Our unrivalled global links to the world's growth markets mean that we are the biggest port in the UK, while our domestic route network connects the nations and regions of the UK to global growth and strengthens the fabric of the Union.

This was made apparent through the summer of 2022 as we visited businesses from every region that relied on Heathrow's connectivity. From shortbread bakers in Scotland and marmalade makers in Wales, to tea growers in the South West and fire extinguisher manufacturers in the East of England, our airport provides the means by which they can export all around the world. These businesses create local jobs and boost economic growth, supporting the prosperity of towns and communities across the country.

Aviation is a force for good in the world, lifting millions of people out of poverty through trade and tourism. But these social and economic benefits cannot come at any cost.

Climate change is an existential threat to aviation and the planet, and our industry must play its part by taking fossil fuel carbon out of flying.

That is why at Heathrow, we are taking the lead to decarbonise aviation. We have worked with others across the industry to develop a plan to do so and are taking action in our own airport, reflected in our recently refreshed sustainability strategy – *Heathrow 2.0: Connecting People and Planet*.

Through Heathrow 2.0, we have focussed on the changes we want to make this decade to put us firmly on the path to achieving net zero by 2050. We will deliver change that will make Heathrow a better, healthier place to live and

work. We have set challenging goals to cut carbon emissions from flying by up to 15% and by at least 45% from airport operations on the ground by 2030. Our goal is for 2019 to be the year of "peak carbon" from Heathrow, even with a third runway in the future.

Heathrow must also be a great place to live near, work in and travel through. From cleaner air, quieter nights and taking care of our local environment, to supporting and rewarding long-term employment, our commitments aim to invest in our communities to positively impact the lives of our neighbours, colleagues and passengers.

We have a plan, but this vision cannot become a reality without support. That is why we are working closely with the UK industry and Government to ensure that 'jet zero' takes off. The Government's recent Jet Zero Strategy set out high levels of ambition, but this now needs to be implemented. This means, for instance, not just a mandate for 10% Sustainable Aviation Fuel by 2030 but a price stability mechanism that will encourage investment to kickstart a homegrown industry.

Getting this right, accelerating the change and delivering on our plan is critical not just for Heathrow, but for people, businesses and communities across the UK.

At Heathrow, we are uniquely positioned to enact this change. The following report makes this clear and highlights how important it is that we commit to driving forward sustainable growth and maintaining global connectivity.



**JOHN  
HOLLAND-KAYE**

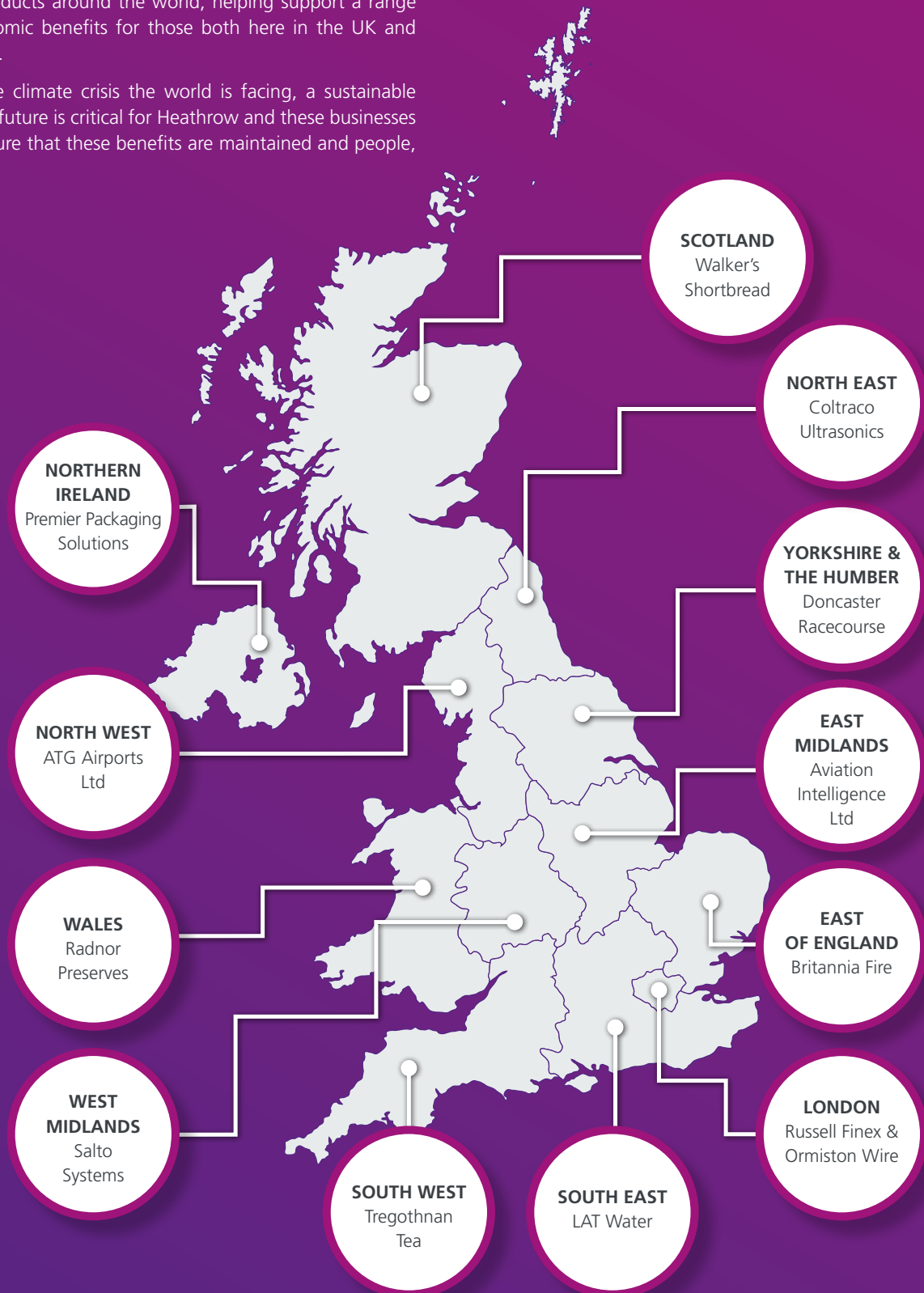
CEO, Heathrow  
Airport

## 2. Connecting the UK to global growth

Over the course of summer 2022, Heathrow visited a number of sites across the UK which rely on Heathrow to access global markets. As the UK's only hub airport, connectivity with Heathrow enables these businesses to sell their products around the world, helping support a range of economic benefits for those both here in the UK and overseas.

With the climate crisis the world is facing, a sustainable aviation future is critical for Heathrow and these businesses – to ensure that these benefits are maintained and people,

businesses and regions as a whole can prosper. The following report brings to life the stories of these businesses, the livelihoods they facilitate and the opportunities they bring to the U.K.



### 3. Why Heathrow matters to all of the UK

#### HEATHROW PROVIDES OVER 200 'UNIQUE' ONE-STOP CONNECTIONS BETWEEN THE UK REGIONS AND THE REST OF THE WORLD

These are connections that are only available in one-stop via Heathrow



#### What does this look like in practice?

In 2019, 3,153 passengers travelled from Belfast Airport to Singapore, of which 2,978 travelled via Heathrow (accounting for 94% of the share). By providing such a significant element of traffic between these locations, Heathrow enables trade in key industries such as high-tech telecommunications and recording equipment, boosting economies here at home and in the fast growing Asia Pacific region.

#### Routes through Heathrow:

For the following routes, the below lists the percentage of people who travelled through Heathrow to get there.

- Belfast to Singapore – 94%
- Belfast to Hong Kong – 92%
- Belfast to Davao – 85%
- Aberdeen to Dubai – 67%
- Edinburgh to New York – 57%
- Glasgow to New York – 55%
- Glasgow to San Francisco – 41%
- Glasgow to Geneva – 66%
- Inverness to New York – 78%
- Manchester to New York – 33%
- Newcastle to New York – 73%

\* Note all these figures are from 2019 and are taken from Quod: Heathrow – International Connections Summary Note, July 2022

Each of the businesses we visited relies on Heathrow either as a direct supplier or as the airport through which they export their goods.

This is because Heathrow sits at the centre of the UK's global connectivity, serving as the country's gateway to the world.

The airport operates what is known as a hub-and-spoke model, connecting holidaymakers to global destinations, businesses to global markets and families to loved ones, providing opportunities no other UK infrastructure or business can deliver.

It means that through the airport, local communities and businesses around Heathrow and regions across the UK – from Glasgow and Belfast to Newcastle and Manchester – are connected to a network of 222 destinations across 86 countries spanning the globe.

It means that businesses from every corner of the country, including each of those we visited, are just a flight away from global markets.



**222**  
destinations



**86**  
countries



### What is a hub airport?

Hub airports like Heathrow are different from point-to-point airports in that they pool demand for global connections.

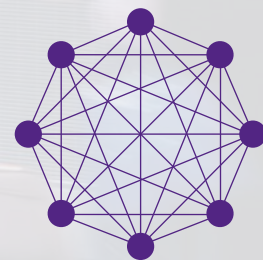
This enables more flights to more destinations that other airports can't support, enabling greater domestic and global connectivity.

### A HUB AIRPORT IS THE MOST EFFICIENT WAY OF CONNECTING MANY POINTS



#### HUB

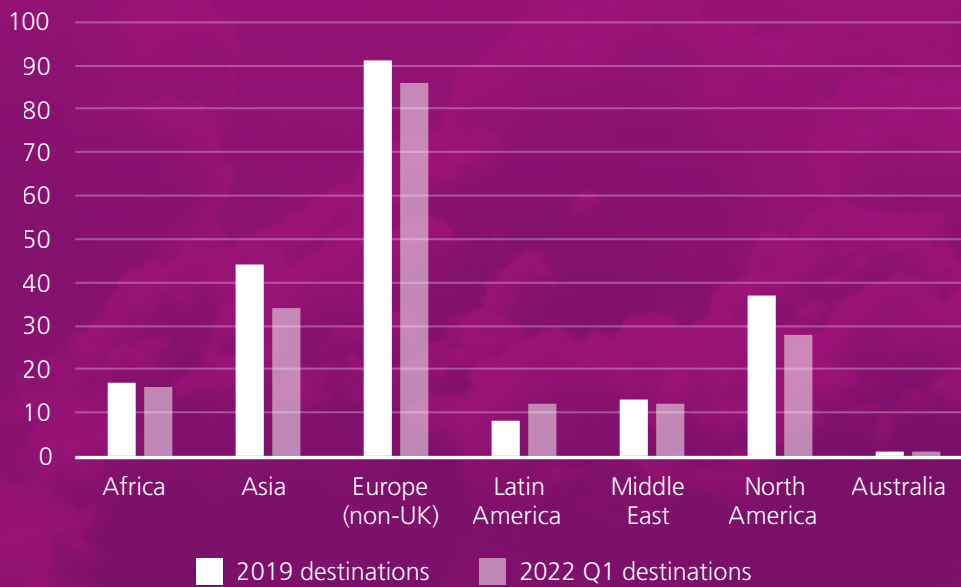
linking 9 points  
requires 8 routes



#### POINT-TO-POINT

linking 8 points  
requires 28 routes

## HEATHROW'S GLOBAL CONNECTIONS

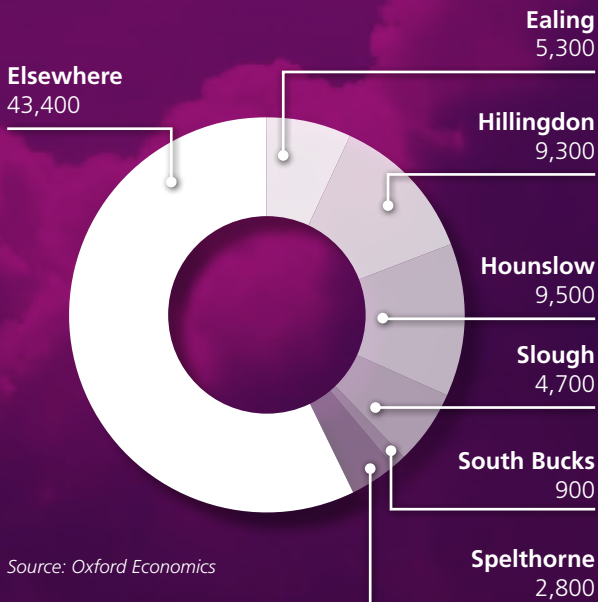


## Making Heathrow's presence felt

- British consumers and businesses can reach 95% of the global economy with a direct flight from Heathrow.
- 75% of all UK air cargo passed through the airport, travelling to 253 destinations.
- In 2021, Heathrow was the most valuable UK port, with £153 billion in non-EU imports and exports travelling through the airport.
- Heathrow provides over 200 'unique' one-stop connections between the UK regions and the rest of the world.
- Around 2 million round trips were made on domestic connections at Heathrow in 2019.
- Over £400m per annum of inbound visitor spending in the UK regions is from overseas visitors transferring at Heathrow.

\* Note all these figures are taken from Frontier, *The benefits of Heathrow's domestic connections, September 2022* and Heathrow's *year in cargo, 2021*

## NUMBER OF HEATHROW EMPLOYEES LIVING IN EACH BOROUGH



Source: Oxford Economics

## Heathrow's importance to the local community

- Heathrow directly supported 88,900 workplace-based jobs across the local community in 2019, of which 76,000 were located at the airport itself.
- It was estimated that 32,600 of the 76,000 resided within the local community.
- Including the supply chain and consumer spending, Heathrow supported 133,600 jobs, equivalent to one in six jobs within the local workforce.
- Activity associated with Heathrow also formed a £12.5 billion GVA contribution to GDP (in 2016 prices), equivalent to almost a quarter (22.9%) of all economic activity across the study area.

\* The local community is defined here as the London Boroughs of Ealing, Hillingdon and Hounslow, Slough, South Bucks, and Spelthorne.

\* Note all these figures are taken from Oxford Economics, *The economic impact of reduced activity at Heathrow, September 2020*

# 4. How Heathrow is leading the way on sustainability

The benefits of aviation are felt the world over. It is not just businesses that rely directly on aviation to export, but also those that feel its effects indirectly. For every business we visited, there are countless other businesses and communities that are impacted.

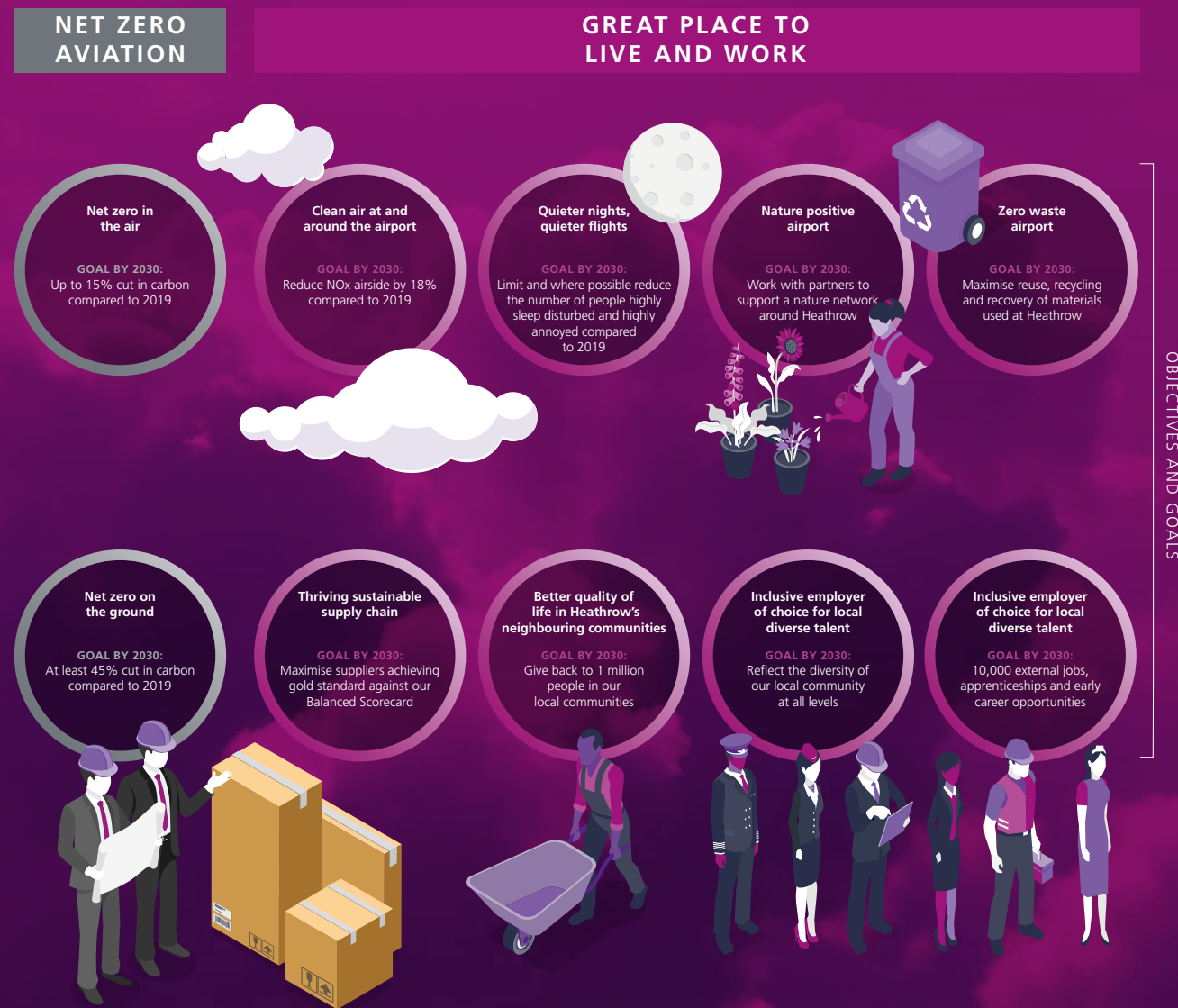
However, the benefits of aviation cannot come at any cost to the planet and local communities. The industry is facing an existential threat – the real impact of climate change.

This means that if we carry on as we are, an increasing number of people will choose not to fly, routes will start to disappear and people will be grounded. This will be to

the detriment of UK businesses, workers and communities, denying growth opportunities and economic benefits.

That is why at Heathrow, we are doing the right thing and taking action.

In early 2022, we refreshed our *Heathrow 2.0: Connecting People and Planet strategy*, highlighting how we are driving forward net zero aviation and ensuring our local area remains a great place to live and work. Originally launched in 2017, it set out how we will deliver the change we all need now so we can make a real difference by 2030.





## At the airport

We are committed to making our airport itself a great place to work for our colleagues and communities. Before the pandemic, there were 88,900 workplace-based jobs at the airport. By 2021, this had fallen to just over 50,000. As the airport recovers, we now have 70,000 work-place based employees.

We are more determined than ever that Heathrow is attractive to future workers in an increasingly competitive jobs market. This means becoming the local employer of choice for diverse talent, and that is why we have committed to providing 10,000 new jobs, apprenticeships and early career opportunities by 2030. All while reflecting the diversity of our local community at all levels of the business.

We have already taken action. In 2017, we became a Living Wage employer and published our London Living Wage roadmap. Since then, we have been working to ensure that all our direct suppliers now also pay the Living Wage.

### Shared Apprenticeship Scheme

As well as ensuring our local community is a great place to live, attracting diverse talent to work at the airport is one of our key aims. We do this through initiatives such as our **Shared Apprenticeship Scheme** in construction. Apprentices are a critical part of our talent pipeline, bringing fresh ideas and innovative ways of working to ensure that Heathrow runs smoothly and safely and that our passengers receive the best airport service in the world.

In addition to our well-established engineering apprenticeship scheme, we launched our Shared Apprenticeship Scheme, a first-ever for an airport, in 2018. Delivered through our delivery partner K-10, the scheme is an available resource for our construction supply chain partners, delivering for young people such as Oliver.

### Shared Apprenticeship Scheme in focus

After leaving school, Oliver planned to become a quantity surveyor but struggled to break into the industry.

The Heathrow Shared Apprenticeship Scheme opened doors for Oliver and gave him a job working with Mace at the Heathrow terminals. Within months, he was owning and managing his own projects and was even invited to speak to sixth-form and college students about his experience.

As to what the future holds for Oliver, he said:

Upon successful completion of the College BTEC units and Associate RICS accreditation, Mace have offered me a full-time position with their team located at Heathrow. Mace are also keen for me to continue my education and I plan to start a part-time Quantity Surveying and Commercial Management BSC Honours degree at the University of Westminster later this year."

**Oliver**



## In the community

Over the last two years, the most significant impact of the pandemic was felt in the local communities around Heathrow.

As we recover, we have a huge responsibility as the UK's largest single-site employer to ensure we continue to deliver change on the local issues that will make Heathrow a great place to live and work. It is crucial for our local economies and communities that the airport recovers in a sustainable way, and that we continue to maximise the benefits and opportunities that the airport brings to the area while minimising its effects. Our local communities are at the heart of our 2.0 plans.

That means enabling a thriving, sustainable economy in the local area by removing barriers and proactively engaging with businesses, including Small and Medium Enterprises (SMEs), to ensure economic benefits through initiatives such as the Heathrow Business Summit are generated for communities locally and across the UK.

From our local schools partnerships and community volunteering to our support of local charities and community groups through the Heathrow Community Trust, we will continue striving to be a good neighbour. Through our new Giving Back Programme, we will work closely with local people and partners to give back to 1 million local people by 2030 through our partnerships, community projects and grants, improving green spaces and supporting residents in need.

We are also aware of the impacts of noise and emissions on local communities. We are committed to supporting evidence-based approaches to reduce noise impacts through our Noise Action Plan and enhanced Noise Insulation Schemes. Alongside our Net Zero Plan, we are focusing on lowering Nitrogen Oxide levels by 18% (compared to 2019) from all airside sources by 2030. Our surface access strategy aims to improve the air quality and reduce congestion in the communities around the airport. On the ground, our goal is to cut carbon by at least 45% (compared to 2019) by enabling

passengers and colleagues to access the airport sustainably, deliver a net zero supply chain and replace airport vehicles with zero carbon alternatives.

### Surface Access

We have taken strides where we can already. In summer 2022, we published our **Surface Access Strategy**. This focuses on all the ways in which passengers, communities, colleagues and goods travel to and from Heathrow. As an integrated transport hub, the way in which this happens is critical in ensuring the airport can recover and grow sustainably to make a positive impact on our local community, the environment and the economy. It plays a fundamental role in reducing congestion, improving air quality and lowering carbon emissions.

The Strategy addresses this by encouraging greater use of public transport, walking and cycling, and ensuring that the remaining motor-vehicle trips are conducted more efficiently and using cleaner vehicles.

### Sustainable Travel Zone

Earlier this year, we launched our Sustainable Travel Zone (STZ). The STZ will deliver multi-modal improvements covering rail, tube, bus and coach services and active travel. It aims to:

- Reduce colleague single occupancy vehicle trips to, from and around the airport, and encourage colleagues to travel by public transport and active travel.
- Provide better travel options for our local communities for journeys to work or for leisure.



# For the country

The biggest challenge we face not just at Heathrow but as an industry is to take the carbon out of flying.

As the UK's world-leading aerospace sector develops new technologies such as hydrogen and electrification, the rollout of Sustainable Aviation Fuels (SAFs) right now is essential to help British passengers fly sustainably. And it is ready – SAFs do not require new fleets or new infrastructure but can be dropped in to what already exists.

Not only will it be good for the planet, but it will be good for the UK. If the production of SAF was incentivised and scaled up, the UK would see new industrial hubs across the country, from Teesside to South Wales, driving local investment in British industry and helping the country level up. As the country transitions to a net zero economy, there is a huge opportunity to develop another world-leading industry.

At Heathrow, we have incentivised the rollout of SAF through our landing charges and are committed to reducing carbon in the air by 15% in 2030 compared to 2019.

Our goal is for 2019 to be the year of “peak carbon” from Heathrow. This will rely on Heathrow, the aviation sector and

the Government acting with urgency and purpose to scale up solutions, particularly SAFs.

The Government has recognised this as a priority, setting out a range of goals in the recent [Jet Zero Strategy](#) which mirror some of our own asks. From a target of net zero on domestic flights by 2040, to a 10% Sustainable Aviation Fuel (SAF) mandate by 2030, the ambition has been made clear.

However, it is now time for ambition to be turned into action and the requisite policies put in place to deliver. The new Government has an opportunity to do just this.



## A UK Sustainable Aviation Fuel Industry: creating jobs and enabling a green recovery across the UK



**UK Potential** +£929m GVA annually +6,500 jobs 3.6million tonnes of CO<sub>2</sub> saved per year

Research shows the potential for 14 Sustainable Aviation Fuel (SAF) plants across 7 locations in the UK. These have the existing infrastructure and skills to support a range of innovative technologies converting wastes and residues into SAF and other sustainable products. Government support is critical to realising this levelling up opportunity to create new jobs and green economic growth at SAF plants and feedstock locations.

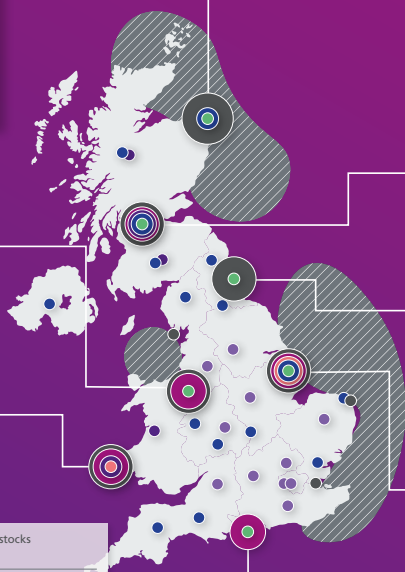
**North West** £92-219m +640-1,520

The local refinery already produces over 16% of the UK's transport fuels.

**South Wales** £133-146m +920-1,020

The site of a UK refinery and the location where Lanzatech is developing plans for a commercial alcohol-to-jet SAF plant at Port Talbot.

Phase 1 feedstocks for SAF	Existing production infrastructure	Phase 2 feedstocks for SAF
Waste that cannot be recycled (commercial and domestic)	Site Refinery	Carbon capture cluster
Forestry Residues		Potential Green H <sub>2</sub> Cluster
Agricultural Residues		Renewable offshore wind
Carbon waste gases		



**St Fergus** £46m-£133m +320-920

Already identified as an important site for low carbon energy, supporting Scotland's Net Zero ambitions with blue and green hydrogen and carbon capture capability.

**Grangemouth** £107-199m +740-1,390

Home of the UK's only refinery with a hydrocracker and the only refinery in Scotland.

**Teesside** £62m-£162m +430-1,130

Already an important industrial cluster for the UK and has access to blue and green hydrogen and carbon capture capability.

**Humber** £133m-£219m +920-1,520

The Humber is already home to two UK refineries as well as being the planned site for the Altalto Immingham waste-to-jet SAF plant which is expected to be operational from 2025.

**Hampshire** £66m-£157m +460-1,090

The refinery is currently responsible for 20% of the UK refinery capacity.

## 5. Turning ambition into action

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Getting this right, accelerating the change and delivering on our plan is critical not just for Heathrow, the aviation industry or the UK but for the planet we live on.

At Heathrow, we are doing all we can, but unless we do more together, aviation will remain under threat and future generations could be grounded. The Government needs to join forces with the industry, providing the right policy as well as the ambition to decarbonise the industry.

That is why we are calling for:

- **Delivering greater energy security and decarbonising UK Aviation:** Building on the Government's confirmed 2030 Sustainable Aviation Fuel (SAF) mandate by delivering a price support mechanism to kick-start a home-grown UK SAF industry.
- **Securing connectivity to the hub:** Reviewing the UK's slot regulations and public service obligation (PSO) guidance to secure air connectivity to the regions and nations of the UK.

- **Seizing the opportunities of Global Britain:** Delivering a package of reform that includes modernising the UK border for both people and freight, as well as introducing new incentives to boost the number of international visitors, such as tax-free shopping and duty-free shopping on arrival.
- **Enhancing rail connectivity:** Work with Government to ensure future commitment to delivering Western Rail and Southern Rail access to Heathrow to boost public transport access to the airport.

If we get this right, businesses from Walker's in Scotland and Premier Packaging Solutions in Northern Ireland, to Tregothnan Tea in the South West and Ormiston Wire in London will continue to benefit, delivering on the world changing opportunities that connectivity can provide.

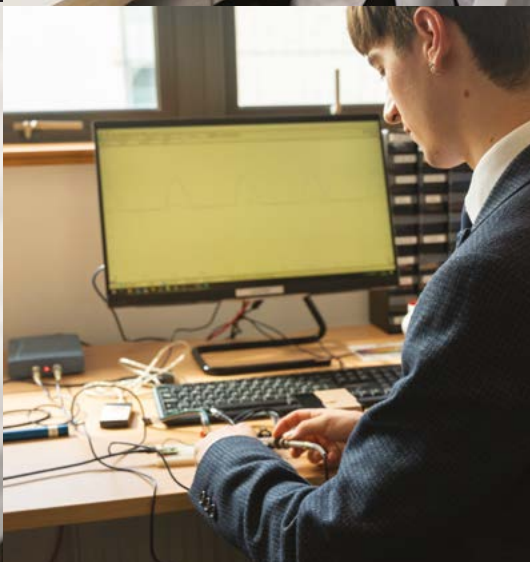
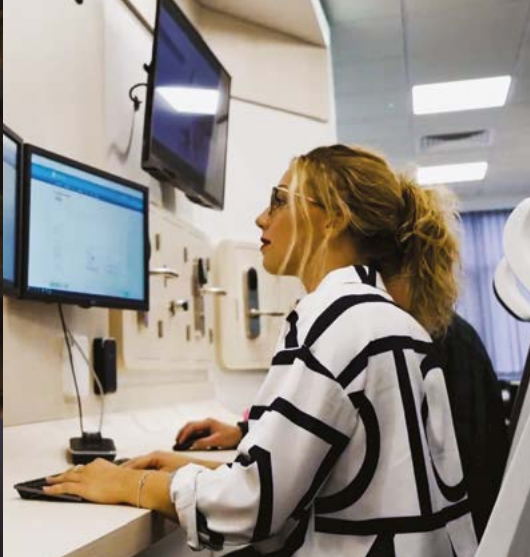


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# REGIONAL CASE STUDIES

GLOBAL CONNECTIVITY  
ON A LOCAL SCALE

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# FOSTERING OPPORTUNITY IN THE EAST MIDLANDS

The East Midlands is not only an industrial powerhouse, but an evolving hub of educational and research-based enterprise. Today, it is home to 370,000 businesses and several major universities including Loughborough, Nottingham and Leicester. These roots in innovation rely on the region's access to international talent. Heathrow's global connectivity allows

businesses and academia to access customers and students across the globe.

The planned HS2 connection at Old Oak Common means that the East Midlands and Heathrow will be more connected than ever, opening up new supply chains and boosting the region's long-term investment and business prospects.



## CASE STUDY: Aviation Intelligence Limited

Based within the Loughborough University Business Park, Aviation Intelligence uses its connectivity to Heathrow and the local higher-education community to provide expert data support directly to the airport. Through this research-focussed connection, Aviation Intelligence uses detailed analytics to improve passenger satisfaction, streamline air traffic schedules and facilitate ground handling operations.

Aviation Intelligence also supports Heathrow with the vital data insights needed to drive the airport's **2.0 Sustainability Strategy** forward. This data allows Heathrow to monitor its progress toward sustainability targets, while highlighting crucial areas for improvement.

**Aviation Intelligence is working with Heathrow to collect the vital data needed to enact our 2.0 Sustainability Strategy targets, including:**

- Cutting 15% of air carbon emissions by 2030.
- Reducing ground carbon emissions by 45% by 2030.
- Limiting and reducing the number of disruptions to local residential areas.
- Using Heathrow's Balanced Scorecard to promote and assess the sustainability of every regional supplier.



Technology is at the focus and forefront of enabling Heathrow's goals and targets. That's where we come in as a technology company, supporting Heathrow to help them understand how to measure and deliver their sustainability targets."

**Peter Dean**  
CEO



# SUPPORTING AN INTERWOVEN SCOTLAND

Heathrow is a bridge between Scotland and the rest of the world, serving routes to Aberdeen, Edinburgh, Glasgow and Inverness for over 1 million passengers a year.

Aviation relies on people travelling to beautiful places. Heathrow has funded regeneration projects in peatlands and woodlands across Scotland to cut carbon emissions and help restore the natural ecosystems that attract international visitors.

Glasgow's five higher educational institutions are home to **130,000 students** from 135 countries.

Scottish businesses exported **£28.8 billion** worth of goods in 2017. Scotland's top five export partners are the Netherlands, USA, Germany, China and France.

In 2019, business passengers to/from Scotland via Heathrow generated more than **£570m** in trade and investment.

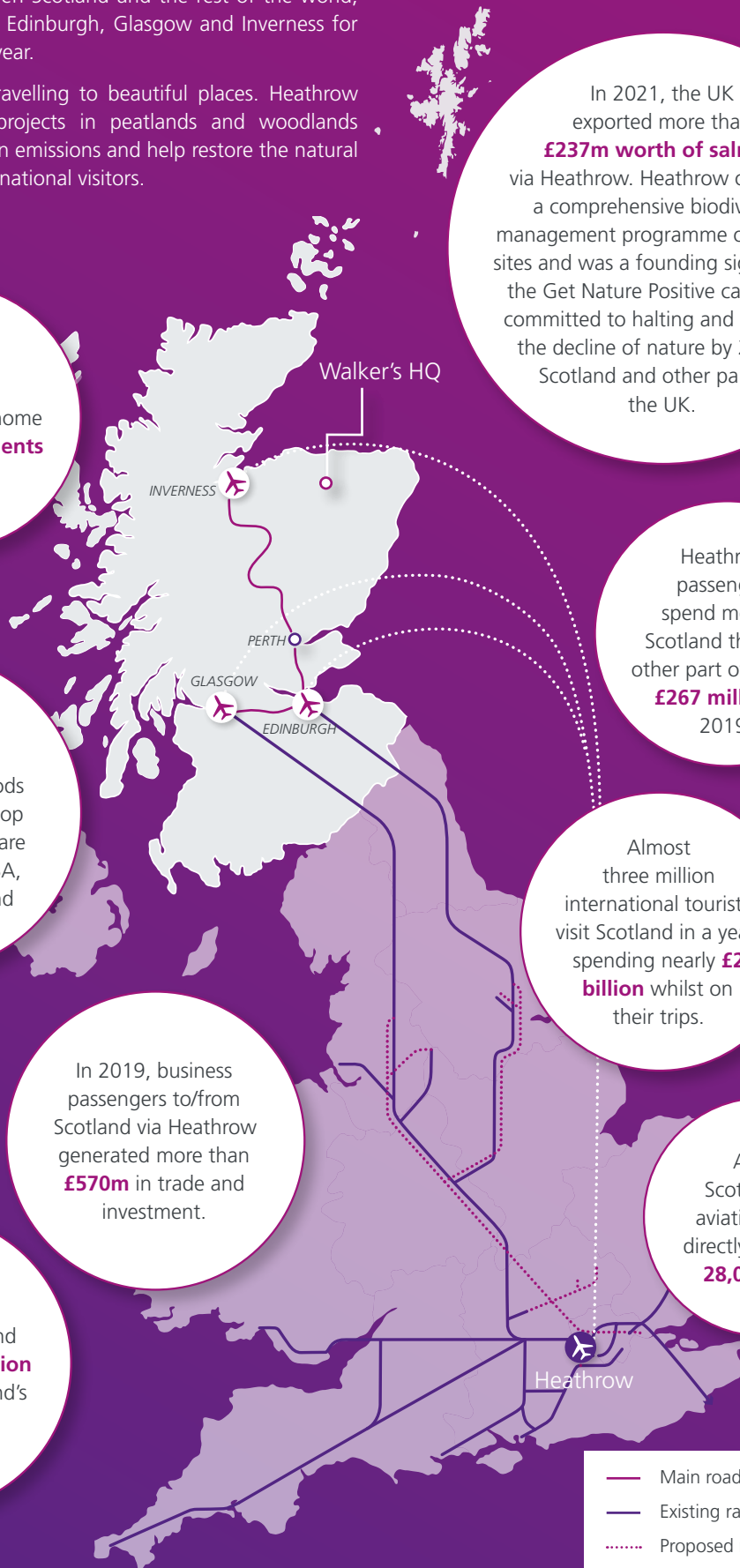
Tourism related industries in Scotland generate over **£1 billion** each year for Scotland's rural economy.

In 2021, the UK exported more than **£237m worth of salmon** via Heathrow. Heathrow operates a comprehensive biodiversity management programme on its own sites and was a founding signatory of the Get Nature Positive campaign, committed to halting and reversing the decline of nature by 2030 in Scotland and other parts of the UK.

Heathrow passengers spend more in Scotland than any other part of the UK: **£267 million** in 2019.

Almost three million international tourists visit Scotland in a year, spending nearly **£2 billion** whilst on their trips.

Across Scotland the aviation sector directly generates **28,000 jobs**.



## CASE STUDY: Walker's Shortbread

Founded 125 years ago, Walker's now employs well over a thousand people but has always remained a family-run Scottish business. Based in Aberlour – north of the Cairngorms – Walker's utilises Heathrow's global connections to reach its international customers with its products featuring across Heathrow's terminals. Today, Walker's exports to over 100 countries, with overseas sales making up almost half of Walker's business.

A sustainably growing Heathrow enables British exporters like Walker's to access new markets through a greater selection of flights and destinations. Walker's Managing Director, Nicky Walker, believes that this growth is a "key part" of both the company's growth strategy and its commitment to working with supply chain partners that share Walker's sustainability principles.

“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



# DRIVING A TRULY GLOBAL NORTH EAST TECH SECTOR

The North East has a proud industrial heritage and is home to renowned global advanced manufacturing companies, including Nissan in Sunderland, Caterpillar in Peterlee, and Siemens in Hebburn. The life sciences and tech sectors are growing rapidly, and Heathrow is allowing companies to leverage the expertise of local universities including Durham, Newcastle and Sunderland to power burgeoning British export industries. This innovation will be crucial to enabling **Heathrow's 2.0 Sustainability Strategy**. Cutting 80% of carbon produced in flight by 2050 will require significant research and investment with the North East's advanced tech sector playing a crucial role in scaling up the supply of Sustainable Aviation Fuel and aircraft improvements.



## CASE STUDY: Coltraco Ultrasonics

2021 Heathrow Global British Business Champion and recipient of the Queen's Award for Enterprise & International Trade in 2022

Manufacturing advanced technology systems, Coltraco Ultrasonics relies on Heathrow to air freight its British technology to customers in over 120 countries worldwide.

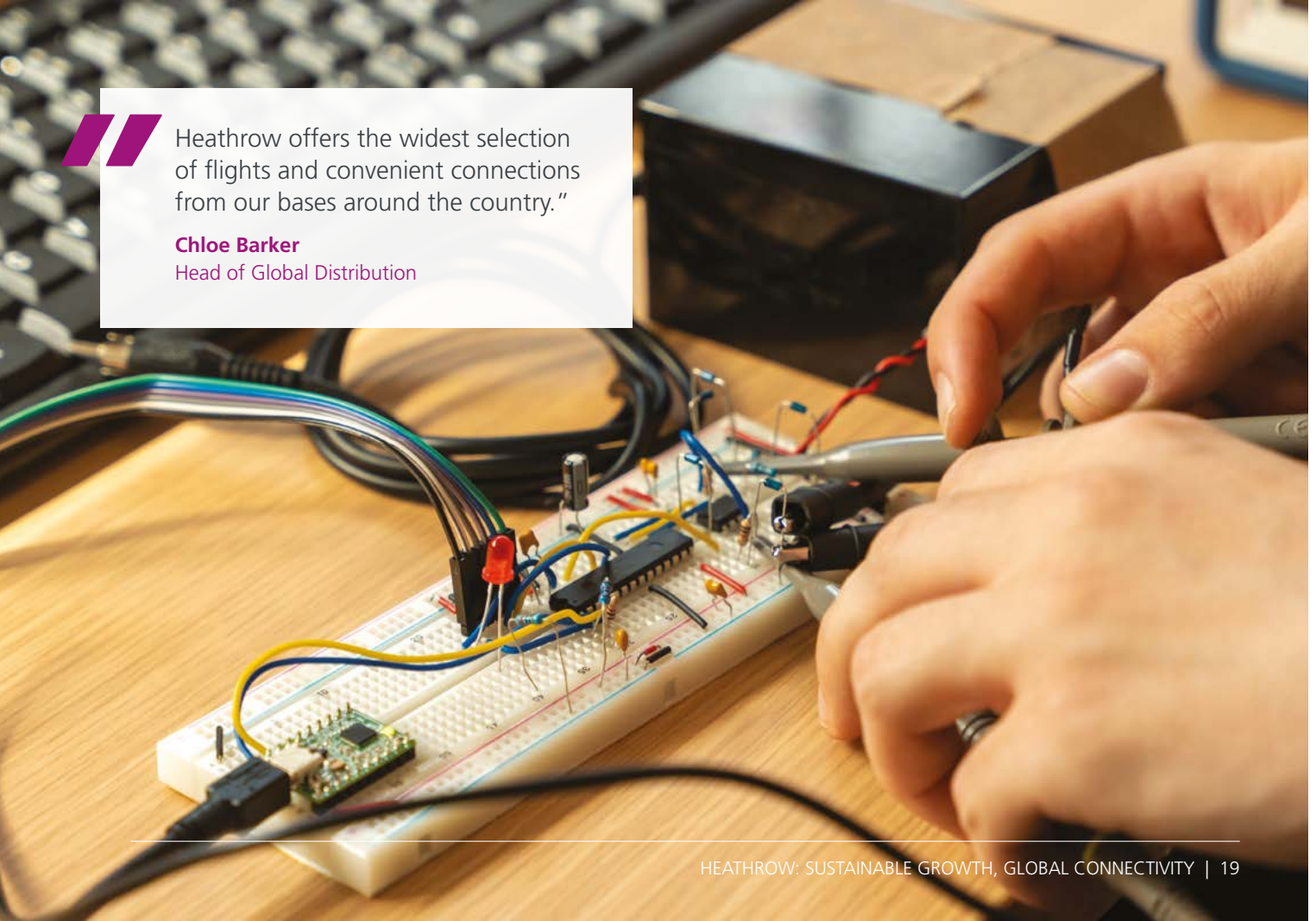
Thanks to Heathrow's regional connections, Coltraco can calibrate their technology in their Durham research facility and fly their technology through Heathrow to international customers in under 24 hours. Regional connectivity is at the core of their competitive business model, with offices in the North East, South West and London.

Coltraco is aiming to carbon offset their deliveries as they continue to expand their business. Our **Heathrow 2.0 strategy** sets out how Heathrow will deliver its own growth sustainably. By replacing all airport vehicles with zero carbon alternatives and investing in sustainable fuel options, we aim to cut at least 45% of Heathrow's on the ground carbon emissions by 2030.



“We aim to carbon offset all of our deliveries, and Heathrow's commitment to sustainability allows us to achieve this as we export through them.”

**Adrian Saw**  
Head of Research and Development



“Heathrow offers the widest selection of flights and convenient connections from our bases around the country.”

**Chloe Barker**  
Head of Global Distribution

# HEATHROW'S LOCAL IMPACT

The people who work in and around Heathrow every day are the lifeblood of the airport community. Over 72,100 people were employed directly at Heathrow in 2019, with more than 13% of the workforce living in the local area and therefore within a few miles of the site. The airport indirectly supports an estimated 11,000 workplace-based jobs in Hounslow, bringing investment and talent to the local area.

We continue to invest in the local community and aim to:

- Generate at least £6.5 million for the Heathrow Community Trust by 2030.
- Reach more than one million local residents with our community investment programmes by 2030.
- Support over 10,000 external jobs, apprenticeships and early career opportunities.
- Launch a new 2022 Giving Back Programme.

London attracted over **3,800** Foreign Direct Investment projects between 2012-17 (more than any other region) which generated over **105,000 new jobs**.

Over **£36 billion** worth of goods is exported from London each year.

**75%** of local transport and logistics businesses say Heathrow plays a major role in their key business decisions.

Over **19.1 million international** visits were made to London in 2016, generating expenditure of over £11 billion. As the region looks to recover from the pandemic, Heathrow's new Elizabeth Line connection will help reconnect Heathrow's local area with the world.

International students' off-campus expenditure is over £1 billion in the London area, with spending supporting over **8,800 jobs** in the Heathrow's local region.

Russell Finex

Heathrow

Ormiston Wire

PADDINGTON  
SHENFIELD  
FARRINGDON  
STRATFORD  
LIVERPOOL ST

— Main road connections  
— Existing rail routes  
- - - - - Proposed new rail routes

## CASE STUDY:

### Russell Finex

Russell Finex, founded in the UK over 85 years ago, is a global leader in fine mesh technology, manufacturing custom-order sieves and filters for blue-chip companies and small family businesses alike. Using Heathrow's extensive airfreight connections, Russell Finex exports its custom-made British technology to over 140 countries worldwide. With planned expansions in Brazil and the USA, an increasingly connected Heathrow remains crucial to the company's future growth.

Employing over 250 employees, their proximity to Heathrow grants Russell Finex competitive access to major international markets. This connectivity has spurred investment in their West London factory in Feltham, which continues to boost the local economy and bring highly skilled talent to the area. A successful apprenticeship scheme is helping to equip young people with the specialist skills needed to power the UK's green manufacturing sector.

“ We’re looking to move things forward in Brazil and can see Heathrow playing quite a major role in that.”

**Ray Singh**  
Managing Director

## CASE STUDY:

### Ormiston Wire

Ormiston Wire Ltd is a specialist metal wire manufacturing company located in Isleworth, West London. Founded over 200 years ago in 1793, the family-run business supplies wire for a variety of applications ranging from military uses to abstract art.

Ormiston Wire's close proximity to Heathrow brings the world market to their doorstep. The company thrives off fast and efficient logistics made possible by their 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



# EMPOWERING THE WEST MIDLANDS

For generations, the West Midlands has been the engine of the UK and is renowned for its advanced manufacturing and engineering sectors.

The region is one of the best connected in the UK, with the M5 and M6 motorways and West Coast Main Line providing road and rail connections for the movement of goods and people – connectivity that helped Birmingham to host a successful 2022 Commonwealth Games.

The region's existing European connections through Birmingham Airport are complemented by Heathrow's global route network, enabling businesses to access an even greater variety of international markets.



The West Midlands accounts for **10%** of the UK's goods exports.

Across the West Midlands the aviation sector directly generates **32,000 jobs**.

HS2 rail will provide **fast routes to Heathrow** from the Midlands with the journey time from Birmingham halving to 1 hour 4 minutes.

The West Midlands attracted 731 Foreign Direct Investment projects between 2012-13 and 2016-17, which generated just under **43,000 new jobs**.

International students spend almost **£500 million** a year in the West Midlands, supporting nearly **4,000 jobs** in the region.

**2.2 million** international visitors came to the West Midlands in 2016, spending over **£850 million** whilst on their trips.

HS2's London to West Midlands route will further **bolster the region's connectivity**. With trains running straight from Birmingham Curzon Street to Old Oak Common, Heathrow will be directly connected to this future-proof transport network via the Elizabeth Line.

## CASE STUDY: SALTO Systems

Based in Warwickshire, Salto Systems develops and manufactures advanced and reliable wireless locking and access control solutions. It is widely recognised as a global market leader in the industry, and Heathrow has helped it to expand its operations throughout the UK and in 90 countries worldwide.

As well as supplying to Heathrow, the airport's cargo capabilities have played a vital role in Salto's global expansion, which now extends to 40,000 projects across 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





# SUSTAINING THE SOUTH EAST

The South East boasts a strong and diverse economic base. From digital tech companies in Reading to motorsport companies in Oxford, the South East has the highest employment rate of any region and attracts more Foreign Direct Investment than any area outside of London. Over 96,000 people are employed in the aviation sector within the South East, making it one of the largest industries in the region.

Having Heathrow on its doorstep has helped support the South East to become the economic powerhouse it is today. Whether importing or exporting, businesses in the South East can rely on their proximity to Heathrow to rapidly connect to international markets and business travellers.

The South East's businesses exported **£45.2 billion** worth of goods in 2017.

**75%** of all UK air cargo goes through Heathrow offering the South East unparalleled access to global supply chains and customers.

**5.2 million** international visitors came to the South East in 2016, spending over £2 billion whilst on their trips to cities like Oxford and Canterbury.

Across the South East the aviation sector directly generates **96,000 jobs**.

International students' off-campus expenditure at Universities including Oxford, Portsmouth, Southampton, Sussex and Kent totals **£641 million** a year. Over 5,000 jobs in the region are supported by this spending.

Foreign Direct Investment in the South East between 2012-2017 generated over **25,000 new jobs** in the region.

LAT Water



- Main road connections
- Existing rail routes
- ⋯ Proposed new rail routes



## CASE STUDY:

### LAT Water

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

As a connectivity hub, Heathrow has been critical to LAT Water's continued success. With domestic partners as far north as Aberdeen and international partners as far as China, the access the fast, easy access Heathrow permits both home and abroad is critical to the continued success of the business.

LAT Water also prides itself on its commitment to sustainability. Its mission is to provide sustainable water for its customers, but it also works with key supply chain partners like Heathrow to fulfil the airport's [sustainability strategy](#) and reduce the environmental impact of their operations.



Heathrow delivering on sustainability would really enhance our credibility and ensure that they are our absolute preferred supplier."

**Mark Hardiman**  
Co-founder and Chief Executive Officer

# CONNECTING NORTHERN IRELAND

Northern Ireland is a major UK tourist destination, served by George Best Belfast City and its domestic connections to Heathrow's international routes. The country's business population has seen significant growth in recent years, and its education system is one of the best performing in Europe, with the best GCSE and A-level results in the UK. It has attracted major business investment in a range of sectors from advanced manufacturing to IT, where strong links with world-leading universities like Queen's University Belfast and Ulster University are driving innovation in this dynamic, interconnected region.



## CASE STUDY: Premier Packaging Solutions

Premier Packaging Solutions is a Northern Irish company specialising in quality bespoke and plain, printed packaging for various sectors, including the hospitality and wholesale industries.

Operating from Newtownards, 12 miles outside of Belfast, the region's frequent and reliable links to Heathrow have been crucial for the company's success. They have grown their international exports with the possibility to expand into Australasian and African markets.

The company was founded with a strong environmental commitment. The company uses eco-friendly, sustainable materials in all their products.



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 there and arrive safely."

**Mark McMahon**  
Founder and Director



We're always looking to improve on our sustainability, if Heathrow can be hand in hand with us in that it will help further the ethos we started the company with."



# HEATHROW AND THE SOUTH WEST

From world-leading tourist destinations such as the Cornish Coast to landmarks such as Stonehenge and educational institutes such as Exeter and Falmouth universities, Heathrow connects passengers to a rich social and geographical landscape. A whole range of industries thrive in the region, from the world-renowned clotted cream producer, Rodda's, to leading aeronautics companies based in the Greater Bristol area.

There were **70,000 point-to-point passengers** flying between the region and Heathrow, while **23,000 transfer passengers** travelled to and from the region via Heathrow.

There were **4,000 leisure passengers** and **2,000 business passengers** who travelled to the South West via Heathrow in 2019. These passengers spent **£3m** in the region in 2019.


Across the South West the aviation sector directly generates **48,000 jobs**.

In 2019, business passengers flying on one-stop connections to and from the South West via Heathrow generated more than **£10 million in trade and investment**.

International students' off-campus expenditure at universities like Bristol, Exeter and Falmouth is over **£323 million a year**, supporting over **2,800 jobs** in the region.

Tregothnan Tea





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."

## CASE STUDY:

### Tregothnan Tea

Tregothnan Tea planted the first tea gardens in the UK, yielding the country's first home-grown tea in 2005. Fifteen years later, they are now Europe's largest tea gardens, with over 20,000 tea bushes planted each year.

Tregothnan exports their produce to over 50 countries, while over 100 countries have bought Tregothnan Tea at one time or another. They rely on Heathrow because of the airport's unrivalled global reach and its connections with the rest of the world, while their supply chains also look overseas for mechanical support and expertise.



Travel via Heathrow is vital to a business like Tregothnan where we are supplying the world's number one drink to drinkers in over 50 countries on a regular basis."

**Jonathan Jones**  
Managing Director of Trading

# ENABLING A THRIVING EAST OF ENGLAND

The East of England is a major UK renewable energy hub, offering world-class expertise in advanced engineering, life sciences and sustainable technology. Home to over 52% of the UK's offshore wind capacity, the region's businesses are also helping Heathrow to decarbonise its own supply chains as part of its **2.0 Sustainability Strategy**.

The region's economic success makes the East of England one of only three regions to make a net contribution to the public finances. Its booming industries are supported by world-class educational links, with universities like Cambridge, Essex, Lincoln and Anglia-Ruskin all benefitting from Heathrow's domestic and international connections.



## CASE STUDY:

### Britannia Fire

Britannia Fire Limited 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 their extinguishers on the outskirts of Norwich, exporting their innovative British technology through Heathrow access some of the fastest growing international markets in the global economy. 10 years ago, Britannia Fire designed and patented a unique composite extinguisher named the P50 – capable of producing just 1/3 of the carbon emissions required to produce a traditional steel fire extinguisher. The P50 has been deployed across Heathrow as a part of the airport's [2.0 Sustainability Strategy](#) and its commitment to cut its supply chain carbon emissions by 36% by 2030.

“ 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





# CONNECTING THE NORTH WEST GATEWAY

The North West is home to over 530,000 businesses and boasts the highest economic output of any region in the North of England and Midlands. Companies like BAE Systems have invested heavily in the region with the urban centres of Manchester and Liverpool fuelling a growing aerospace sector alongside a bustling cultural and tourism industry. With over 127,000 passengers flying between Heathrow and the North West each year, Heathrow's role as a bridge

between Manchester Airport and international destinations is pivotal to the region's economic success.

**Heathrow's 2.0 Sustainability Strategy** is geared towards making this crucial connectivity more sustainable. The goal is to cut the carbon generated during flight by up to 15% by 2030, using aircraft improvement, sustainable aviation fuel and air space modernisation to reduce the environmental impact of these journeys.





## CASE STUDY:

### ATG Airports

Headquartered in Warrington, ATG Airports has become a leading supplier of airfield ground lighting for both the civil and military sectors. Founded in 1993, ATG now employs 56 employees in the North West region and has worked directly with Heathrow for the past 25 years to manage the airport's complex lighting systems.

ATG also benefits from Heathrow's air freight capacity to supply their technology to a global customer base, working with airports from Eastern Europe to Asia. Heathrow's domestic and international connections also allow their engineers to maintain their global installations at short notice, translating connectivity into competitiveness.

In line with [Heathrow's 2.0 Sustainability Strategy](#), ATG is developing its lighting solutions to reduce their carbon emissions, just one of the technological improvements that Heathrow will utilise to achieve its net zero infrastructure and buildings goal by 2030.

“The size of Heathrow provides us with a reference site that is globally recognized and helps promote our business and attract new customers.”

**Andy Sole**  
Strategic Development Director

# HELPING YORKSHIRE AND THE HUMBER TO THRIVE

Home to over 5.4 million people, Yorkshire's economy is defined by its variety. Beyond its recognisable tea, the region's urban centres of Leeds and Sheffield host thriving digital sectors, with companies like Plusnet and WANdisco benefitting from the region's strong export links to international markets. Yorkshire's tourist industry continues to grow, with Bradford having successfully bid for the UK City of Culture 2025 title. With this planned investment into its cultural economy, Yorkshire will rely on Heathrow's ability to open up the region to international visitors and businesses as it looks to grow its diverse economy further. The domestic

connection between Heathrow and Leeds Bradford Airport will directly fuel this growth.

With this growth comes a responsibility to preserve Yorkshire's outstanding natural beauty. **Heathrow's 2.0 Sustainability Strategy** lays out the airport's goal to retain its Biodiversity Benchmark Award while Heathrow's continued funding of regeneration projects across England will help preserve areas like the Yorkshire Dales National Park as the number of leisure visitors increase.

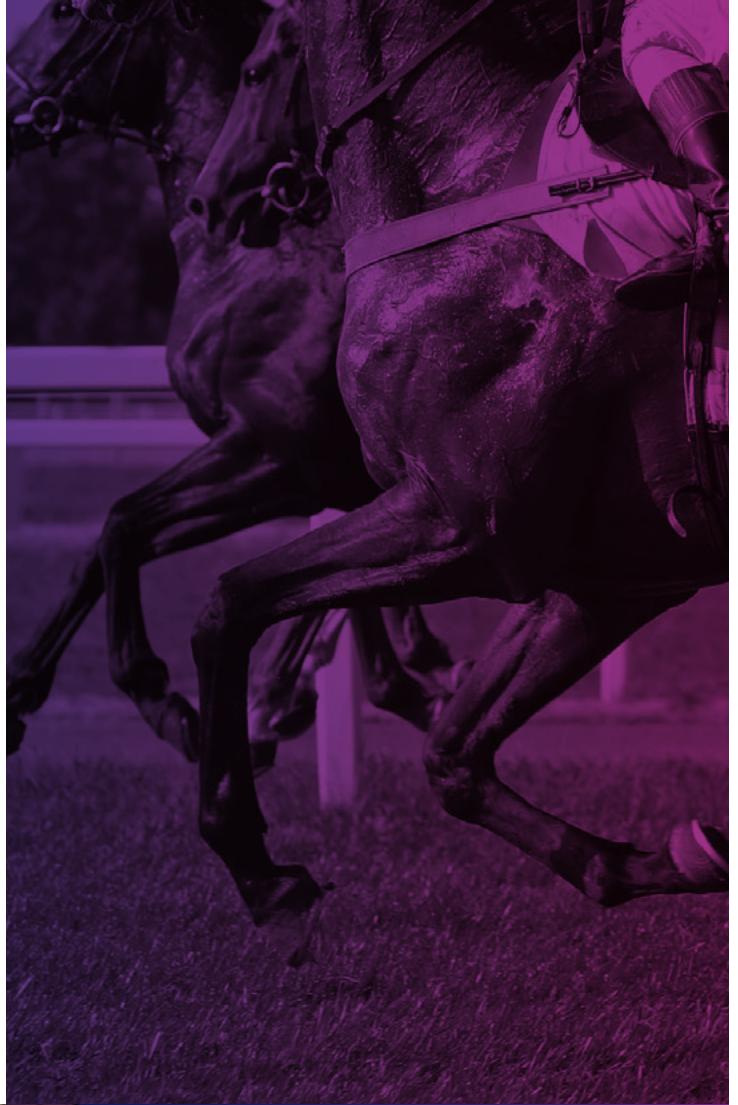


# CASE STUDY:

## Doncaster Racecourse

Doncaster Racecourse is one of Britain's oldest centres for horseracing. With nine world-class racecourses - more than any other region - Yorkshire's heritage as a global hub for horse owners, racers, and spectators relies on the region's domestic and global air connectivity. Hosting 36 race fixtures every year, Doncaster Racecourse is a significant contributor to the region's tourism industry, drawing visitors to its celebrated Cazoo St Leger Festival and throughout the year. The racecourse is also a major venue for corporate events, conferences and exhibitions - having hosted Heathrow's Business Summit in 2018.

Each year, the Racecourse utilises its connectivity to host a series of "Live After Racing" events, showcasing international music artists from across the globe after a day of racing. Situated within the heart of the region's road and rail network - only 90 minutes from London on the East Coast Main Line - Doncaster sits perfectly in Heathrow's regional and global network.



# DELIVERING FOR WALES

Wales has always punched above its size. From the aerospace engineering and nuclear energy industries in its north, to its famed agricultural produce – Wales has it all. Academic centres in Cardiff, Bangor, Aberystwyth and Newport support a specialised metallics and marine technology industry, while beef, wool and agriculture remain the lifeblood of some local economies. All these businesses require connectivity – not just to the UK but to a global market. Heathrow’s rail links to Cardiff and Swansea allow the country’s residents

and varied exports to easily access an international long-haul flight network not directly available through Cardiff Airport. The Welsh Tourism industry, centred around the beautiful Brecon Beacons and Snowdonia National Parks, also benefits from this network. To manage the impact of these journeys, **Heathrow’s 2.0 Sustainability Strategy** aims to reduce the environmental impacts of any international journeys on these precious ecosystems – with our goal to cut in flight carbon by 80% by 2050.





## CASE STUDY: Radnor Preserves

Radnor Preserves, nestled in Newtown, Wales, has been judged as one of the best artisan marmalade makers in the world, using high-quality ingredients to produce handmade marmalades, preserves and chutneys. Radnor's international reputation, having won the Double Gold Prize at the World Marmalade Awards in 2015, has allowed it to export its artisan Welsh produce through Heathrow to a truly global customer base.

Radnor's international supply chain to East Asian markets in Japan and South Korea relies on Heathrow's air freight capabilities. The company is able to fly samples and orders to international buyers at short notice, with its Welsh produce proudly featuring in Tokyo's 2022 British Fair, as well as in Heathrow's own terminals.

On its journey to becoming a certified B Corp, Radnor already adopts a zero-waste policy in its production process, aligning the business with Heathrow's own goal of reducing the airport's total wastage from 2019 levels. Our goal to increase the proportion of SMEs in our supply chain (from 40%) will see more regional businesses like Radnor Preserves benefit from a sustainably growing Heathrow.

“ We want to engage with people who have sustainability at the root of their business. Nothing in our business gets wasted, we use as much of our fruit and veg as we possibly can.”

**Joanna Morgan**  
Director



*At Heathrow, we are committed to taking action to ensure that we can grow sustainably while ensuring the UK retains its global connectivity. This summer we have once again witnessed first hand what these benefits look like as we visited sites across the country.*

*Delivering on our sustainability strategy is critical for the UK. We look forward to continuing to work alongside the government, industry and partners to make good on our plan – for people, businesses and communities across the country.”*

**John Holland-Kaye**

CEO, Heathrow Airport

# Reading and resources

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1 | Heathrow 2.0 Sustainability Strategy

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2 | Heathrow's Net Zero Strategy

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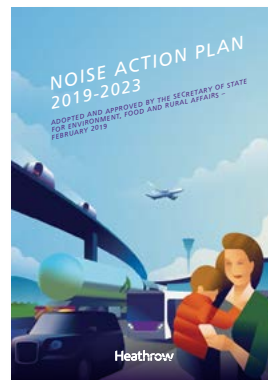


3 | Surface Access Strategy



4 | Local Recovery Plan

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5 | Noise Action Plan

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6 | Sustainability Report 2021





Heathrow