

DP WORLD

HOW DP WORLD LONDON GATEWAY DRIVES TRADE AND PROSPERITY FOR THE UK AND LOCAL COMMUNITIES

THE DP WORLD EFFECT

THE SOCIOECONOMIC IMPACT OF DP WORLD LONDON GATEWAY IN 2025

£799 MILLION

GDP supported in UK

46%

share of UK containerised trade handled by DP World's ports and terminals, London Gateway and Southampton, combined

10,500 JOBS

UK jobs provided and supported

£36 BILLION

value of 2025 UK imports and exports handled by London Gateway's port

5,290

jobs supported locally across London & Essex

£16 BILLION UPLIFT TO UK GDP PER ANNUM FROM 2035

driven by estimated productivity boost from London Gateway's operations and infrastructure

£169 MILLION

government revenues from business and employment taxes generated and supported by London Gateway

EXECUTIVE SUMMARY

The UK is an island nation whose ability to trade and compete internationally depends on a complex and interdependent network of ports, roads and railways. But infrastructure alone is not enough. A large and skilled workforce is also essential to maintaining that connectivity, enabling the UK to compete successfully on the global stage, while also supporting its local industries.



A GATEWAY FOR UK TRADE

DP World's investment in the UK represents the single largest part of the £6.5 billion it has invested in the UK over the last two decades, which has helped create an end-to-end supply chain network built on infrastructure and expertise in ports and terminals, logistics, and marine services. Since announcing construction plans in 2010, the unique capability created at London Gateway in South Essex has become the UK's gateway to global trade and a central part of supply chains supporting businesses and customers across the country.

Combining a growing deep-sea container port, large-scale logistics park, and road and rail connections, London Gateway helps keep goods moving throughout the UK and to major markets worldwide. In 2025 alone, more than 1,100 vessels called at the port and more than three million twenty-foot equivalent units (TEU) of shipping containers crossed the quay wall.

This represents more than one quarter of the UK's total throughput and nearly

30%

of the UK's total container throughput[1]

The number will continue to grow, with more than £1 billion being invested in two new berths and a second rail terminal. The first new berth, London Gateway's fifth, is set to become operational as soon as 2027.

The scale of London Gateway's role is also reflected in the value of trade moving through the port. In 2025, imports and exports totalling £36 billion passed through the port's 24/7 operation, loaded and unloaded from the world's largest cargo vessels by its 16 quay cranes and their skilled operators[2].

As a key site within Thames Freeport, London Gateway contributes to a wider effort to strengthen the UK's trading economy by attracting investment and supporting industrial growth across the Thames Estuary. For everyone in the value chain, London Gateway's infrastructure provides reliable access to international markets and ensures that essential goods reach businesses and households across the country.

Transport connections put London Gateway in reach of up to

85%

of the UK population within four hours

EXECUTIVE SUMMARY (CONT.)

Such benefits extend beyond the logistics of moving cargo, too. Economic activity across the port and logistics park contributed to:

An estimated
£799 MILLION
to UK GDP in 2025

10,500
UK jobs, either on-site or supported in the wider economy

£169 MILLION
in government revenue

Oxford Economics also estimates that the connectivity London Gateway provides today raises UK labour productivity by an estimated 0.5% a year - equivalent in the model to an annual £16 billion increase in UK GDP from 2035.

London Gateway's impact is amplified by its connection to DP World's wider network of assets and supply chain solutions across the UK, from the container terminal at Southampton to contract logistics facilities serving vital sectors like automotive, technology, and retail. Freight forwarding and marine services keep the UK economy connected to its closest markets in continental Europe, and around the world.

INVESTING FOR THE UK'S FUTURE

Alongside it, the seven million square foot logistics park is one of Europe's largest. Together, the port and logistics park provide the UK economy with a unique port-centric facility for trade, with unparalleled access to the nation's manufacturing hubs and consumer markets, and smooth links to the world's major shipping routes.

Continued growth will see thousands more high value jobs created, both on the South Essex site itself and across the wider UK economy.

Realising that potential, however, will depend on more than infrastructure alone. As the UK faces skills shortages across transport and logistics, investment in people is becoming just as important as investment in capacity.

DP World is supporting workforce development through apprenticeships and early-career opportunities across the Thames Estuary, helping to build the skills needed to sustain the UK's future trading economy.

THE DP WORLD EFFECT

For DP World, that is an important measure of the impact of trade. Through Oxford Economics' independent analysis, this report explores how investment in trade infrastructure, combined with support for people and local communities, can contribute to wider economic and social progress.

This is what DP World refers to as the DP World Effect: the idea that trade can create value that reaches far beyond the port gate.

GROWTH, TRADE AND THE UK'S PRODUCTIVITY CHALLENGE

Turning economic growth into long-term competitiveness depends on addressing some longstanding challenges. The OECD has identified productivity, business investment and workforce participation as important factors in sustaining future growth[3]. Meanwhile, the UK Government's Industrial Strategy places renewed emphasis on sectors expected to drive future economic expansion[4].

Naturally, **trade is a crucial part of that equation**. Oxford Economics estimates that approximately £7.5 billion of exports passing through London Gateway in 2025 were linked to the eight sectors identified in the Industrial Strategy, accounting for 57% of the port's exports. These industries – from advanced manufacturing to life sciences and clean energy – are expected to play a central role in the UK's future growth.

Ongoing skills development needs to keep pace with growing infrastructural capabilities if the UK is to meet its economic ambitions, though. The UK transport sector could face a workforce shortfall of between 409,000 and 618,000 people by 2030[5]. Skills shortages already account for more than a quarter (27%) of vacancies nationally[6], while more than one million people aged 16 to 24 are not in education, employment or training[7].



Thurrock, where London Gateway is located, is where these challenges have particular relevance. Transport and storage accounts for 25% of employment, compared with 5% nationally, underlining the importance of the sector to the local economy[8]. While the borough's employment rate is above the national average, local stakeholders have stated that the benefits of economic growth have not historically been felt equally across its communities[9]. As London Gateway and the wider logistics sector continue to develop, connecting local people with the skills and opportunities created by that growth will therefore be an important part of translating investment into wider local benefit.

The connection between these local and national challenges is productivity. **Investment in infrastructure can strengthen connectivity and unlock economic opportunities**, but long-term growth also depends on whether people have the skills needed to take advantage of them, and whether a workforce can grow with the operation. As investment flows into the industries expected to drive the UK economy, combining infrastructure with workforce capability will become increasingly important.

London Gateway's contribution can be understood through this lens: as part of the connectivity and productive capacity underpinning the UK's long-term competitiveness.

OVERVIEW OF DP WORLD LONDON GATEWAY: THE UK'S GATEWAY FOR TRADE

Based on operational data provided by DP World as part of Oxford Economics' independent study, London Gateway:

Operates four container berths with a combined capacity of 3.4 million TEU. The port handled more than

3 MILLION TEU

for the first time in 2025, following substantial growth in recent years

Is equipped with 16 quay cranes standing up to

138 METRES

in height, taller than Big Ben or the London Eye

Can accommodate four vessels simultaneously, including next-generation ultra-large container ships with capacity of up to

24,000 TEU

Handles more than

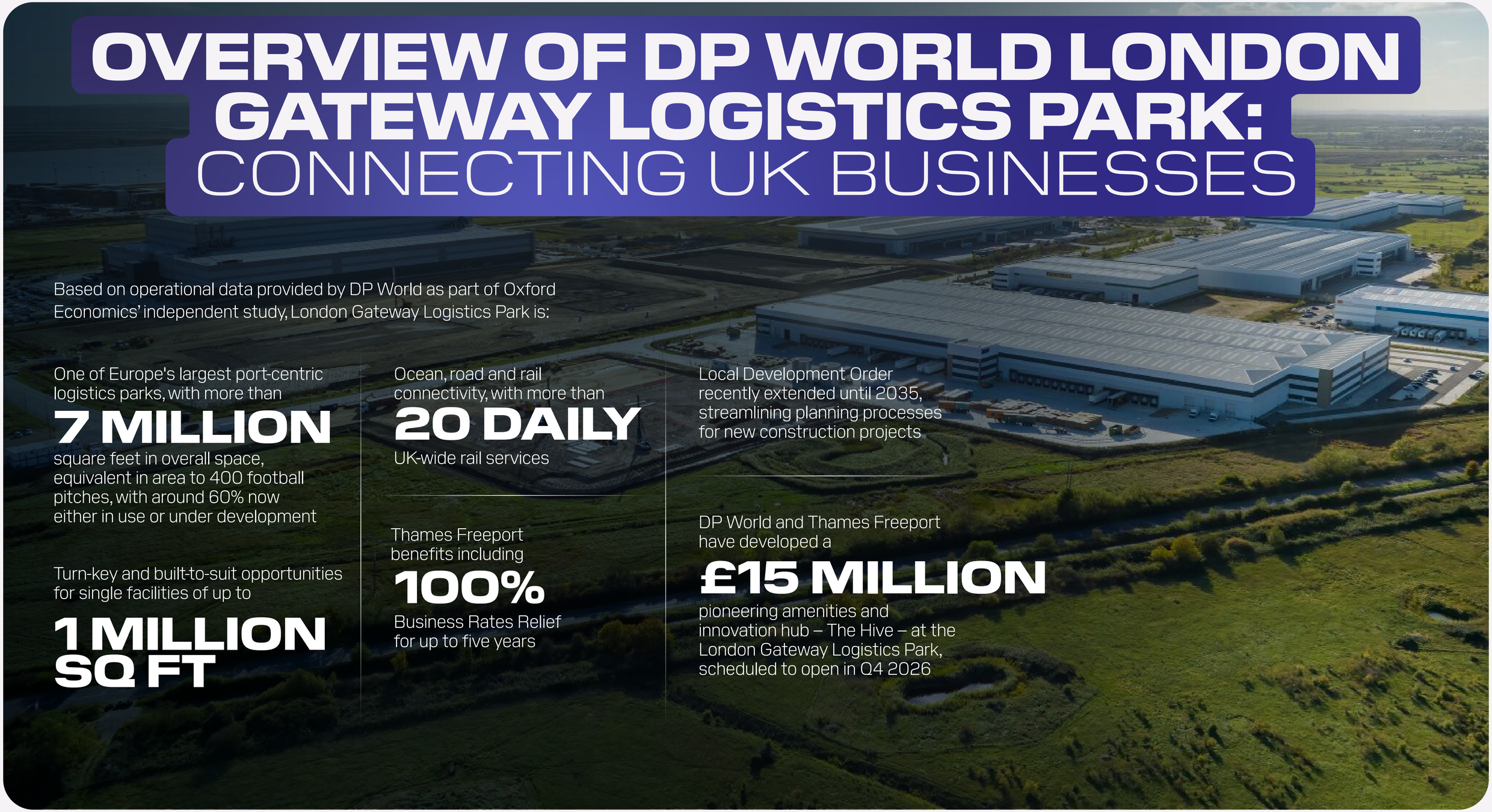
1,100 VESSEL CALLS

annually

> **"LONDON GATEWAY IS A BENCHMARK EXAMPLE OF WHAT WORLD-CLASS PORT INFRASTRUCTURE CAN DELIVER FOR THE UK. MAJOR PORTS LIKE THESE DON'T JUST MOVE GOODS; THEY CREATE SKILLED CAREERS, DRIVING GROWTH THROUGHOUT THE COUNTRY THAT ALLOWS THE UK TO BE A RESILIENT ISLAND NATION."**
>
> **Geraint Evans,** Chief Executive Officer, UK Major Ports Group

London Gateway combines a deep-sea port, logistics park and multimodal transport links in a single location. Together, this infrastructure enables the site to connect UK businesses with international markets while providing access to major consumer centres across the country.

OVERVIEW OF DP WORLD LONDON GATEWAY LOGISTICS PARK: CONNECTING UK BUSINESSES



Based on operational data provided by DP World as part of Oxford Economics' independent study, London Gateway Logistics Park is:

One of Europe's largest port-centric logistics parks, with more than

7 MILLION

square feet in overall space, equivalent in area to 400 football pitches, with around 60% now either in use or under development

Turn-key and built-to-suit opportunities for single facilities of up to

1 MILLION SQ FT

Ocean, road and rail connectivity, with more than

20 DAILY

UK-wide rail services

Thames Freeport benefits including

100%

Business Rates Relief for up to five years

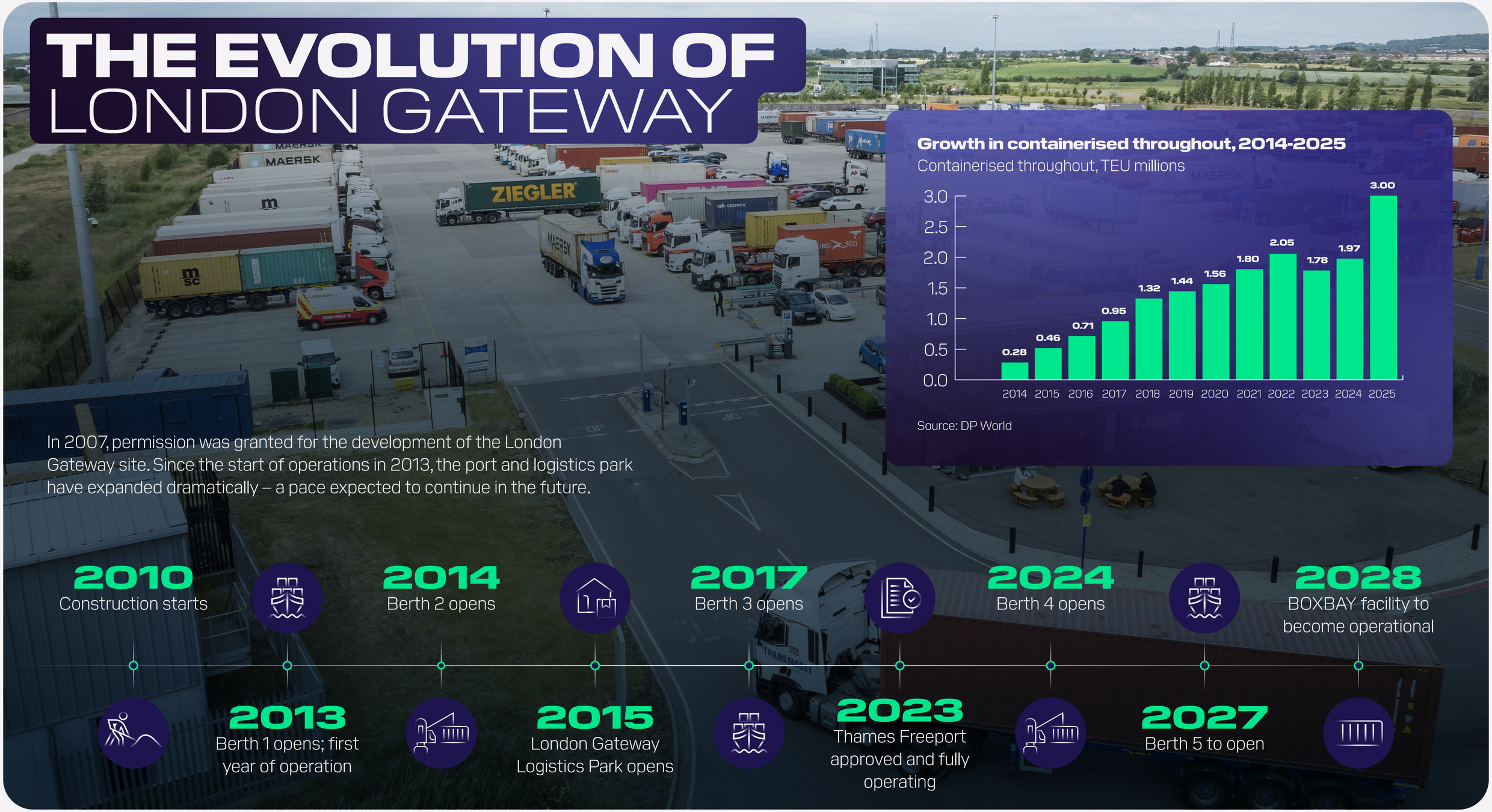
Local Development Order recently extended until 2035, streamlining planning processes for new construction projects

DP World and Thames Freeport have developed a

£15 MILLION

pioneering amenities and innovation hub – The Hive – at the London Gateway Logistics Park, scheduled to open in Q4 2026

THE EVOLUTION OF LONDON GATEWAY



Growth in containerised throughout, 2014-2025

Containerised throughout, TEU millions

Source: DP World

In 2007, permission was granted for the development of the London Gateway site. Since the start of operations in 2013, the port and logistics park have expanded dramatically – a pace expected to continue in the future.

2010
Construction starts

2013
Berth 1 opens; first year of operation

2014
Berth 2 opens

2015
London Gateway Logistics Park opens

2017
Berth 3 opens

2023
Thames Freeport approved and fully operating

2024
Berth 4 opens

2027
Berth 5 to open

2028
BOXBAY facility to become operational

ECONOMIC CONTRIBUTION

GDP AND GOVERNMENT REVENUES



Oxford Economics estimates that the operations of DP World and its customers at London Gateway made a substantial contribution to the UK economy in 2025:

£799 M

Contributed £799 million to UK GDP

10,500 JOBS

Supported 10,500 jobs across the UK

£169 M

Generated £169 million in government revenues

These contributions were generated through three channels of impact[10]:

£381 M

DIRECT IMPACT:
£381 million contributed to UK GDP and 3,000 jobs supported through the on-site operations of DP World's on-site customers

£286 M

INDIRECT IMPACT:
£286 million contributed to UK GDP and 5,240 jobs supported through supply chain spending by businesses operating at London Gateway

£132 M

INDUCED IMPACT:
£132 million contributed to UK GDP and 2,250 jobs supported by consumer spending of people working at London Gateway and in its supply chain

These impacts demonstrate how activity at London Gateway generates value beyond the hub itself, supporting public revenues, businesses and household incomes across the UK.



ECONOMIC CONTRIBUTION



> **“IF WE WANT TO GROW THE UK ECONOMY, THEN WE NEED WORLD-CLASS INFRASTRUCTURE THAT HELPS BUSINESSES TRADE QUICKLY, RELIABLY AND COMPETITIVELY.**
>
> **DP WORLD LONDON GATEWAY IS A POWERFUL EXAMPLE OF THAT IN ACTION. I’VE SEEN FIRSTHAND HOW THE SITE IS STRENGTHENING SUPPLY CHAINS, BOOSTING OUR TRADE CAPACITY AND HELPING FIRMS ACROSS THE UK REACH INTERNATIONAL MARKETS WITH GREATER CONFIDENCE.”**
>
> **Shevaun Haviland,** Director General of the British Chambers of Commerce

LONDON GATEWAY’S ECOSYSTEM

A substantial share of London Gateway’s economic contribution is generated within London and Essex. Oxford Economics estimates that the hub contributed £489 million to GDP across these areas in 2025.

The impact of London Gateway extends beyond the port itself. Alongside DP World’s port operations, the logistics park is home to more than 30 businesses that use its maritime, road and rail connections to support their own growth. This creates an ecosystem that links international trade with warehousing, distribution, manufacturing and logistics activity across the UK.

CASE STUDY MAGNUM LOGISTICS

Magnum Logistics, an Essex-based business, relocated to London Gateway in 2023. According to Commercial Director Eddie Ryan, proximity to the port has helped the company expand from transport-focused business into a broader third-party logistics provider. This has enabled their customers to take advantage of what Ryan describes as a “port-centric” model, allowing goods to remain closer to customers while reducing unnecessary movements through multiple inland distribution networks.

Oxford Economics estimates that port-related activity contributed to £475 million to UK GDP in 2025, while logistics park-related activity contributed £324 million to UK GDP. These activities illustrate how London Gateway’s economic contribution extends beyond port operations alone, supporting employment and business activity both locally and across the wider UK economy.

OPENING ROUTES FOR BUSINESS

London Gateway does more than move containers. As part of DP World's integrated European network, it connects UK businesses to international shipping and logistics networks – opening routes to markets across Europe and beyond.

DP WORLD IN EUROPE

Across Europe, DP World integrates ports, logistics and marine capabilities with road, rail and short-sea connections to move goods seamlessly through the supply chain.

9 deep-sea terminals

15 European inland terminals

60+ weekly barge services

70+ rail connections

100+ Freight Forwarding offices



PORTS & TERMINALS

Deep-water terminal, container handling & international shipping connections



LOGISTICS

Warehousing, contract logistics, freight forwarding & multimodal transport



MARINE SERVICES

Pilotage, towage, vessel traffic management & essential vessel services



OPENING ROUTES FOR BUSINESS

> **"LONDON GATEWAY PLAYS AN ESSENTIAL ROLE IN CONNECTING BRITISH BUSINESSES TO GLOBAL MARKETS. CONTINUED INVESTMENT IN OUR INTERNATIONAL GATEWAYS AND THE ROAD AND RAIL CONNECTIONS THAT SERVE THEM WILL REDUCE COSTS, STRENGTHEN UK COMPETITIVENESS AND HELP UNLOCK TRADE-LED GROWTH IN EVERY POSTCODE."**
>
> **Ben Fletcher,** Chief Executive, Logistics UK

THE ECONOMIC VALUE OF MARITIME CONNECTIVITY

Using UNCTAD's Liner Shipping Connectivity Index as a measure of the UK's integration with global shipping networks, Oxford Economics first estimated London Gateway's contribution to national maritime connectivity. It then modelled the relationship between that connectivity, labour productivity and goods exports.

The analysis estimates that the connectivity provided by London Gateway is associated with:



2.4%

A sustained 2.4% increase in UK goods exports

0.5%

A sustained 0.5% increase in UK productivity – equivalent to a £16 billion increase in annual UK GDP from 2035

These benefits are separate from London Gateway's direct economic footprint. They reflect the wider value created when businesses gain access to more shipping services, routes and international markets.

WHY CONNECTIVITY MATTERS

FOR BUSINESSES, STRONGER MARITIME CONNECTIVITY CAN MEAN:

- Lower transport costs through access to more efficient shipping networks
- Greater resilience and flexibility when responding to disruption
- Faster and more reliable access to international customers and suppliers
- Improved access to growth markets beyond established trade routes

LONDON GATEWAY'S CONNECTIVITY AT A GLANCE



22
vessel calls per week



17
shipping lines



30
direct shipping services



130+
overseas port connections



3.4 MILLION
TEU annual capacity



24,000+ TEU
maximum vessel capacity accommodated

For strategic industries and regional producers, this reliable and diversified connectivity can turn exporting from an occasional opportunity into a dependable source of long-term growth.

EMPLOYMENT PROFILE

Of London Gateway's total employment contribution, 5,290 jobs support residents across London and Essex. This equates to half of London Gateway's total UK employment contribution. These roles sit within the following industries:

TRANSPORT AND STORAGE:

3,200 JOBS including employment in road haulage, rail-linked services, and third-party logistics

WHOLESALE AND RETAIL

600 JOBS including employment in shops, vendors and service providers serving hub workers and their families

PROFESSIONAL SERVICES

390 JOBS including engineers and other specialists contributing to London Gateway's operations and expansion

The remaining jobs are split across other sectors such as business services, manufacturing, and entertainment.

*Totals may not sum due to rounding.



For Thurrock and the wider Essex economy, this activity supports household incomes across a diverse range of occupations across the quayside as well as in offices, workshops, depots and local businesses. It connects investment in nationally important trade infrastructure with employment and economic activity in the surrounding area.

DEVELOPING FUTURE TALENT

London Gateway supports skills development and early-career opportunities across its operations. DP World's employees at London Gateway include 35 apprentices.
The port also delivered approximately 61,000 hours of training during the year, helping employees develop the operational, technical and safety skills required in a modern logistics environment.



Across its direct, indirect and induced employment impacts, London Gateway supported more than 1,100 jobs held by people aged 24 or younger in 2025.



CASE STUDY

From apprentice to procurement specialist

"Beyond job-specific skills, my apprenticeship taught me the importance of communication and teamwork in a professional environment."

Paul Myers joined DP World at London Gateway as a Procurement Apprentice. His two-year apprenticeship combined on-the-job experience with professional training, achieving a Level 3 CIPS Advanced Certificate and completing his apprenticeship with Distinction.

After completing the programme, Paul was offered a permanent role as a Procurement Specialist at London Gateway. He is now working towards the next stage of his professional development, with the ambition of achieving MCIPS accreditation.

CASE STUDY

Building a global career in logistics

After joining DP World's GROW Graduate Programme, Gemma Green spent more than two years working across operations in Southampton, London Gateway, Rotterdam, Cyprus and Turkey. She gained experience of different commercial strategies, worked alongside specialist teams across multiple countries and developed the sector knowledge that now underpins her career.

Following completion of the programme, Gemma secured a permanent role as Commercial Development Associate within DP World's Business Development Contract Logistics team. She was also nominated for a Young Logistics Professional of the Year award at Multimodal 2026.

WOMEN AT LONDON GATEWAY



Women held an estimated 3,600 of the jobs supported by London Gateway in 2025, representing more than one-third of its total UK employment contribution. Approximately 740 women were employed directly by DP World and its on-site customers.

Across the port, logistics park and wider supply chain, women are contributing across a broad range of operational, technical and leadership roles. Their careers illustrate the variety of opportunities created by London Gateway's growth and development.

CAREER PROGRESSION AT LONDON GATEWAY

After joining London Gateway as a Security Coordinator in 2020, Clara Hurrell-Smith progressed through a series of operational security roles before becoming Regional Security Manager for DP World's North Europe region. In her role, Clara covers port operations, site security and wider regional responsibilities, illustrating the variety of professional pathways available across the business.

ENVIRONMENTAL SUSTAINABILITY AND DECARBONISATION

London Gateway is investing in measures designed to reduce the environmental impact of trade. Its programme focuses on operational efficiency through lower-carbon fuels, electrification and initiatives that help customers reduce emissions within their supply chains.



KEY INITIATIVES INCLUDE:

ENERGY TRANSITION CONTRIBUTION:
Introduced in 2021 to support investment in decarbonisation. DP World has a validated ambition to achieve net-zero greenhouse-gas emissions across its operations by 2050, approved by the Science Based Targets initiative (SBTi)[11].

LOWER-CARBON FUEL:
London Gateway transitioned eligible diesel-powered equipment to Hydrotreated Vegetable Oil (HVO) in 2024. Depending on the feedstock and production pathway, HVO can significantly reduce lifecycle fuel emissions compared to conventional fossil diesel.

PORT ELECTRIFICATION:
London Gateway is investing in high-power charging infrastructure to support its growing electric fleet. This includes Kalmar FastCharge stations and Kempower's ultra-high-power charging system[12].

ELECTRIC STRADDLE CARRIERS:
Eight fully electric straddle carriers were introduced in 2024, with 12 more ordered in 2025 for delivery in 2026. Each carrier reduces carbon emissions by at least 54% compared with non-electric models[13].

RENEWABLE ENERGY:
On-site solar energy projects are being rolled out across the site to further increase London Gateway's access to renewable electricity.

BOXBAY: CREATING CAPACITY FOR FUTURE GROWTH

As trade volumes at London Gateway grow, making better use of the available space and infrastructure will become increasingly important.

DP World's
£170 MILLION INVESTMENT
in BOXBAY's Empty Superstack, a cutting-edge container handling technology, is designed to increase storage capacity while helping containers move efficiently through the terminal.

The facility will hold up to 27,000 TEU of empty containers, stacked vertically in an automated storage system. Moving these containers out of the main container yard is expected to reduce unnecessary rehandling and free up capacity for other port operations.

For customers, that means more reliable operations and shorter truck turnaround times. For London Gateway, it will allow existing space to be used more efficiently as the port grows, while automation and fully electric equipment are also intended to support safer and lower-emission operations.

It will be Europe's first use of this technology, following extensive trials at DP World's Jebel Ali Port in Dubai. The investment forms part of London Gateway's wider expansion as the hub builds the capacity needed to handle growing UK trade.

AT A GLANCE:

£170 MILLION
investment at London Gateway

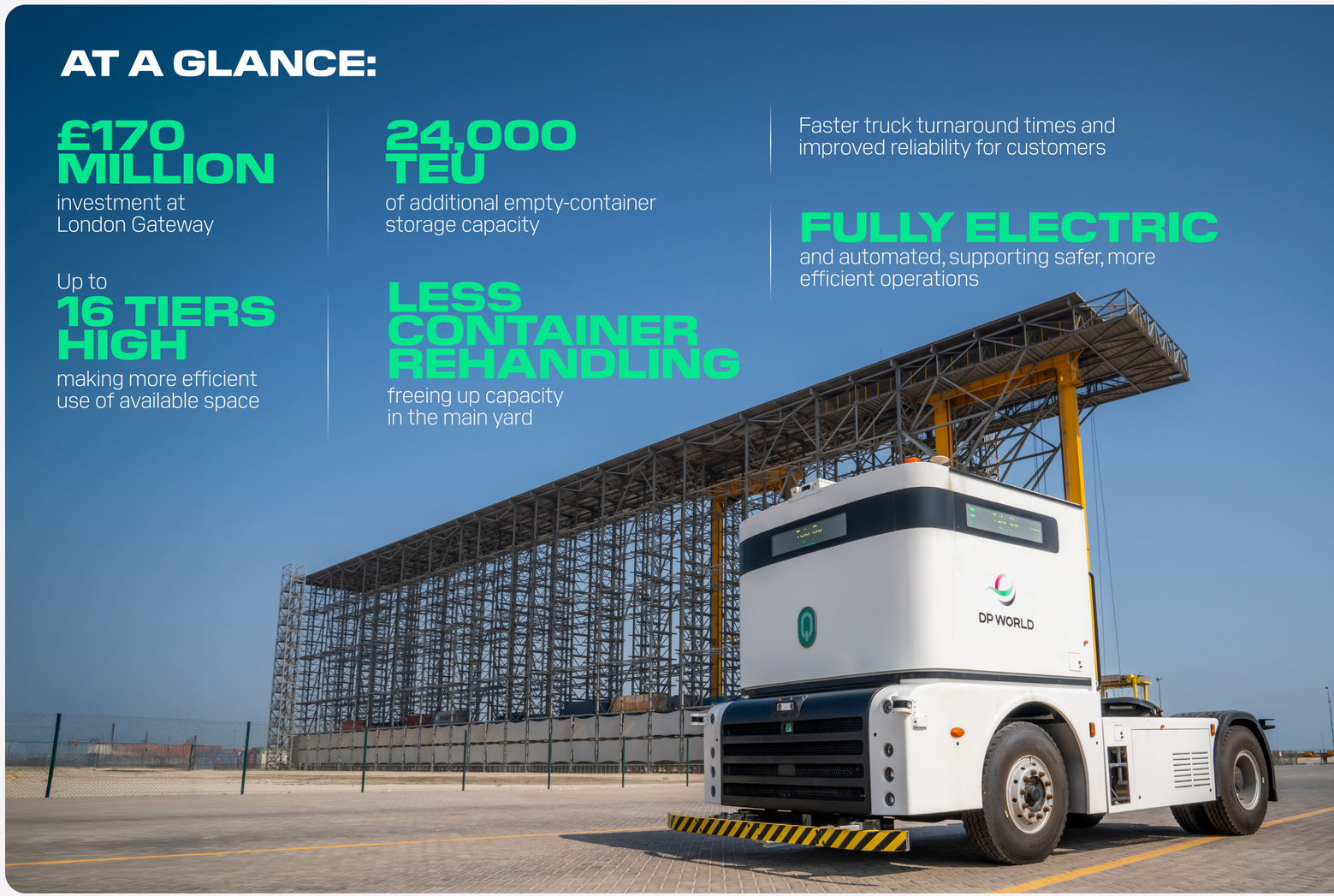
24,000 TEU
of additional empty-container storage capacity

Faster truck turnaround times and improved reliability for customers

FULLY ELECTRIC
and automated, supporting safer, more efficient operations

Up to
16 TIERS HIGH
making more efficient use of available space

LESS CONTAINER REHANDLING
freeing up capacity in the main yard



COMMUNITY INVESTMENT AND LOCAL REGENERATION

DP World works with charities, schools and community organisations to support the areas surrounding London Gateway. Its connection to the local economy is also reflected in its workforce, with more than 80% of the port's employees living within 20 miles of the site.

COMMUNITY INVESTMENT FUND

The London Gateway Freeport Community Investment Fund is expected to provide £15 million over five-to-ten years to support projects benefiting local communities. More than £2.8 million has already been spent or committed across projects focused on young people, social cohesion and safer communities.

ONSIDE THAMES GATEWAY YOUTH ZONE

£1.3 million committed to the new OnSide Thames Gateway Youth Zone, creating a dedicated space for young people in the local area.

IMPACT TO DATE:

- Opening 2027
- 19 youth zones operating across the UK – three more under construction
- Over £13 social return on investment for every £1 invested into OnSide Youth Zones

BEYOND BOUNDARIES INITIATIVE

DP World has donated a repurposed shipping container, equipped with cricket helmets, gloves and pads to Stanford-le-Hope Cricket Club. The container also serves as a pavilion with a scoreboard, and seating for players and spectators.

IMPACT TO DATE:

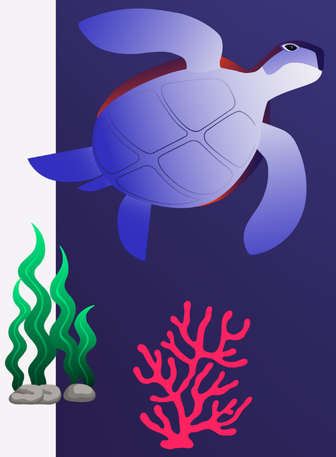
- Three cricket nets donated to Stanford-le-Hope Cricket Club and local schools
- 250 cricket kits also donated

SMALL GRANTS FUND

£10,000-£50,000 of funding awarded to 20 charities and community groups, including young carers projects, community radio and local scouts.

IMPACT TO DATE:

- 17 small projects underway and 12 more to onboard
- £710,000 spent or committed on youth projects; £370,000 of which is ringfenced for local schools



SEAL RESCUE & REHABILITATION UNIT

Funded running costs for a dedicated seal rescue and rehabilitation facility at the South Essex Wildlife Hospital as part of a three-year partnership. Supported the rescue and care of sick, injured and orphaned marine animals found along the Essex and Kent coastline.

COMMUNITY PARTNERSHIPS

Local charity support. Partnerships with organisations including:

- Queen Victoria Seafarers' Rest
- Thurrock Foodbank:
  - 4.7 tonnes of food collected and donated since 2012
- Essex & Herts Air Ambulance (EHAAT):

Donated £5,000 to support EHAAT's CPR Smart Programme, taking CPR training to schools in the local area.

EDUCATION AND CAREERS

Schools and careers outreach. Supporting schools near London Gateway through:

- Mock interviews
- Careers events
- Skills competitions
- Apprenticeship awareness activities

IMPACT TO DATE:

- Three new primary school priority partnerships for academic year 2026/2027
- Back to the Wild annual primary school competition:
  - Provided £2000 first prize to design and build a wildlife zone
  - Funded five £500 runners-up vouchers to invest in outdoor space at school

CONCLUSION

LOOKING AHEAD: DP WORLD EFFECT AT LONDON GATEWAY

At London Gateway, moving goods is part of a much wider story: connecting UK businesses to global markets, bringing investment into the Thames Estuary and creating opportunities for the people and communities around it.

As the UK looks to raise productivity and strengthen its position in global trade, that role will become more important. As a key site within Thames Freeport, London Gateway combines international connectivity with the infrastructure and capacity businesses need to invest and grow.

Continued investment in infrastructure and skills can extend those benefits further, building capacity for future trade while developing the workforce needed to support it.

The result is a ripple effect that begins at the port but reaches much further; into businesses able to access new markets, industries able to expand and communities able to participate in the opportunities that growth creates.

THIS IS THE DP WORLD EFFECT IN ACTION.

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OXFORD ECONOMICS CREDIT

Port operations are conducted by DP World and include managing the terminals and quayside, and handling ships and cargo.

LONDON GATEWAY LOGISTICS HUB

PORT OPERATIONS
Port operations are conducted by the port authority and its tenants include managing the terminals and quayside, and handling ships and cargo.

PARK OPERATIONS
Park operations support the running of London Gateway's Logistics Park managing its more than 30 diverse tenants.

LOGISTICS PARK CUSTOMERS
Companies operating across wholesale and retail, offices administration, and personal services provide goods and services supporting the hub's activities.

EXPANSION PROGRAMME
London Gateway's major £1 billion expansion programme is underway, expanding the operations of both the port and park.

MEASURING DP WORLD'S ECONOMIC IMPACT

DIRECT IMPACT
Economic activity generated by DP World's and its tenants' on-site operations through managing the terminals, handling ships and cargo, and providing a wide range of park services.

INDIRECT IMPACT
Economic activity stimulated by DP World and its tenants through the procurement of goods and services and capital investments required to operate.

INDUCED IMPACT
Economic activity sustained by DP World's and its tenants' employees and those working in their supply chains spending their wages in the consumer economy.

TOTAL IMPACT
Together, these three channels of impact (direct, indirect, induced) comprise the core economic impact of DP World.

CATALYTIC IMPACT OF PORT INFRASTRUCTURE

DP World's port infrastructure at the London Gateway Logistics Hub improves connectivity with the rest of the world, boosting long-term productivity and exports.

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MEASURING THE ECONOMIC IMPACTS OF INCREASED MARITIME CONNECTIVITY

To establish a relationship between improvements in maritime connectivity and a country's productivity and export competitiveness, we construct a set of econometric models. In these models, we use the UNCTAD's liner shipping connectivity index as the key explanatory variable capturing connectivity. A higher index score indicates greater integration within global shipping.

Alongside the LSCI variable, we regress a group of other explanatory variables to control for other factors that affect exports and productivity. We experiment using a range of control variables sourced from economic literature (previous studies that have identified drivers of productivity and export competitiveness). In our productivity model, we identify trade openness, inwards FDI flows, a measure of government effectiveness, and investment per employee as other drivers of labour productivity. In the exports model, we use levels of production output, capital to labour ratios, and the exchange rate as control variables. Both models are "dynamic" meaning the lag of the dependent variable is used as an explanatory variable.

In the model, labour productivity is specified as constant prices GDP per worker and export volumes as a share of GDP. Natural logarithm transformations are applied to both variables to aid interpretation.

After experimenting with a range of econometric models, we adopt the Arellano Bond estimator as the most appropriate model. This model was selected following a series of diagnostic tests, deeming other modelling approaches unsuitable. The model passes the Hansen and Nickell bias tests.

We find that improvements in maritime connectivity have a significant and positive impact on labour productivity and export volumes whilst controlling for other factors that affect dependent variables. Using the results of our econometric modelling, a one percent increase in the LSCI is associated with a 0.20% increase in labour productivity and a 0.33% increase in export volumes.

We adjust the productivity coefficient for labour content in GDP for each country before applying as a GDP uplift.

SCHEMATIC OF THEORY OF CHANGE DRIVING CONNECTIVITY BENEFITS

DP WORLD'S PRESENCE IN LONDON GATEWAY

INCREASE IN MARITIME CONNECTIVITY (MEASURED BY THE LSCI)

Increased number of direct connections opens up new markets for exporters; increased competition between liner companies leads to lower prices for exporters; increased number of services improves choice for exporters; greater container capacity allows for increased trade.

OPPORTUNITY FOR INCREASED EXPORTS

Lower costs and time associated with trade; increased export competitiveness.

OPPORTUNITY FOR INCREASED ECONOMIC PRODUCTIVITY

Access to new markets allows UK firms to greater exploit economies of scale; improved access to cheaper and higher-quality inputs; exposure to foreign markets acting as a catalyst for innovation.

REGRESSION RESULTS, CONTROL VARIABLES NOT REPORTED FOR BREVITY

DEPENDENT VARIABLE: NATURAL LOGARITHM OF PRODUCTIVITY

VARIABLE	COEFFICIENT	STANDARD DEVIATION
Lagged dependent variable	0.926	0.031
Natural logarithm of LSCI (short-run)	0.015	0.009
Groups (countries used in panel)	118	:

DEPENDENT VARIABLE: NATURAL LOGARITHM OF EXPORTS

VARIABLE	COEFFICIENT	STANDARD DEVIATION
Lagged dependent variable	0.797	0.047
Natural logarithm of LSCI (short-run)	0.066	0.036
Groups (countries used in panel)	65	:

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BOILERPLATE

Oxford Economics is the world's leading independent economic advisory firm. Covering over 200 countries, 100 industrial sectors and 8,000 cities and regions, we provide insights and solutions that empower clients to make informed decisions faster in an increasingly complex and uncertain world. For more information, visit https://www.oxfordeconomics.com/

METHODOLOGY NOTE

Oxford Economics conducted a socioeconomic impact assessment of DP World's operations across seven ports and terminals, drawing on detailed operational, financial and workforce data provided by DP World. The analysis combined economic impact modelling with econometric analysis to assess both the economic footprint of port operations and their wider catalytic effects on productivity and trade.

To measure the economic footprint of DP World's port operations, Oxford Economics collected detailed operational, financial and workforce data provided by DP World. These inputs were used to estimate gross value added (GVA) contributions to GDP, employment impacts and government revenues, capturing the direct activity generated by port operations as well as indirect supply chain effects and induced impacts supported through employee wage spending. The economic footprint results were modelled using Oxford Economics' Business Economic Impact Calculator (BEIC), which incorporates national and subnational input-output tables across 185 countries to trace how business expenditure flows through supply chains and supports economic activity across the economy.

In addition, Oxford Economics assessed the wider economic benefits associated with improved maritime connectivity. Using econometric analysis, the study examined how stronger integration into global shipping networks, measured using UNCTAD's Liner Shipping Connectivity Index (LSCI), is associated with higher productivity and export competitiveness over the long term. The models control for other economic drivers to isolate the relationship between connectivity and economic performance, providing an evidence-based estimate of the broader catalytic impacts of DP World's port infrastructure.

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