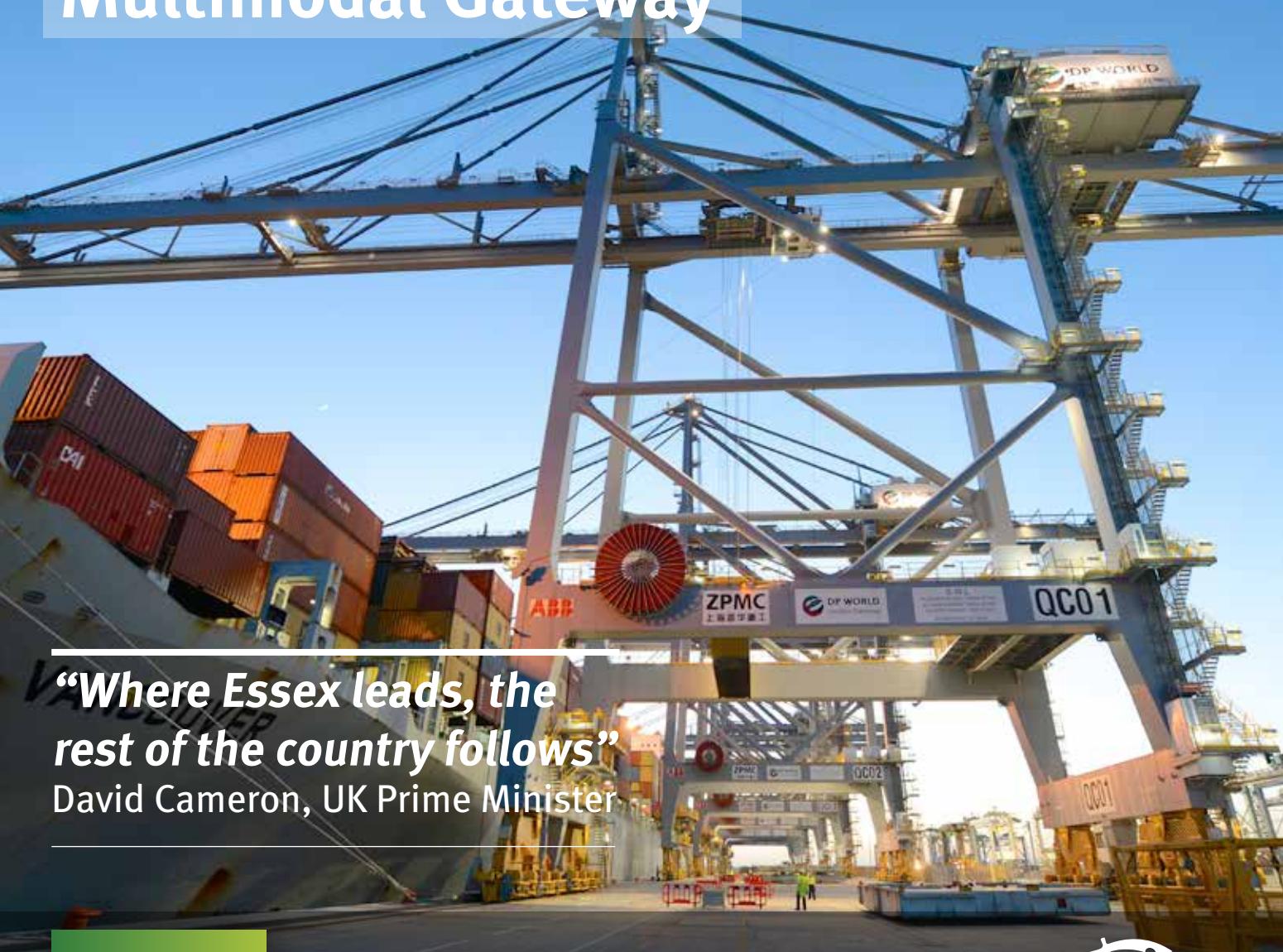


Essex: The UK Multimodal Gateway



“Where Essex leads, the rest of the country follows”

David Cameron, UK Prime Minister

Why Essex?

Essex is home to the UK's most concentrated port and logistics infrastructure and is a leading UK and European hub for . . .

- Air Cargo
- Import and export operations
- Retail distribution
- Portcentric distribution

Essex has five outstanding benefits . . .

Size of the sector

Over 11,000 companies in the Port, Logistics and related sectors in Essex.

Sources: Office for National Statistic - UK Business Counts 2013; Business Register and Employment Survey 2012; WAVTEQ 2013)

Supply of talent

120,300 employees in port, logistics and retail activities in Essex.

Of which 35,000 are directly employed in transport storage in Essex.

28% of individuals have a tertiary education qualification.

Access To UK & EU markets

Direct proximity and access to London, only 30 minutes away.

Excellent domestic and international infrastructure and transport links.

Access to European and global markets, with over 190 international locations served from major regional airports.

Major cost savings

Up to 38% cost savings compared to other leading European port locations (Frankfurt, Hamburg, Rotterdam, Vienna)*.

(*Based on 190 person Logistic Centre)

Excellent location solutions

Major Ports and Logistics service clusters in Stansted, Thurrock, Basildon, Waltham Abbey, Harlow and Harwich.

Strong and growing supply of high quality Retail Distribution Centres.

Locate in a prime global Ports & Logistics hub

The UK is a leading global hub for Ports and Logistics services operations . . .

- Ranked #1 FDI* location in Europe for the last decade¹
- Ranked #2 Ease of Doing Business in EU - after Denmark²
- Ranked #3 in Europe for shipping connectivity³
- Over 1.5 million people employed in the transportation and storage sector⁴

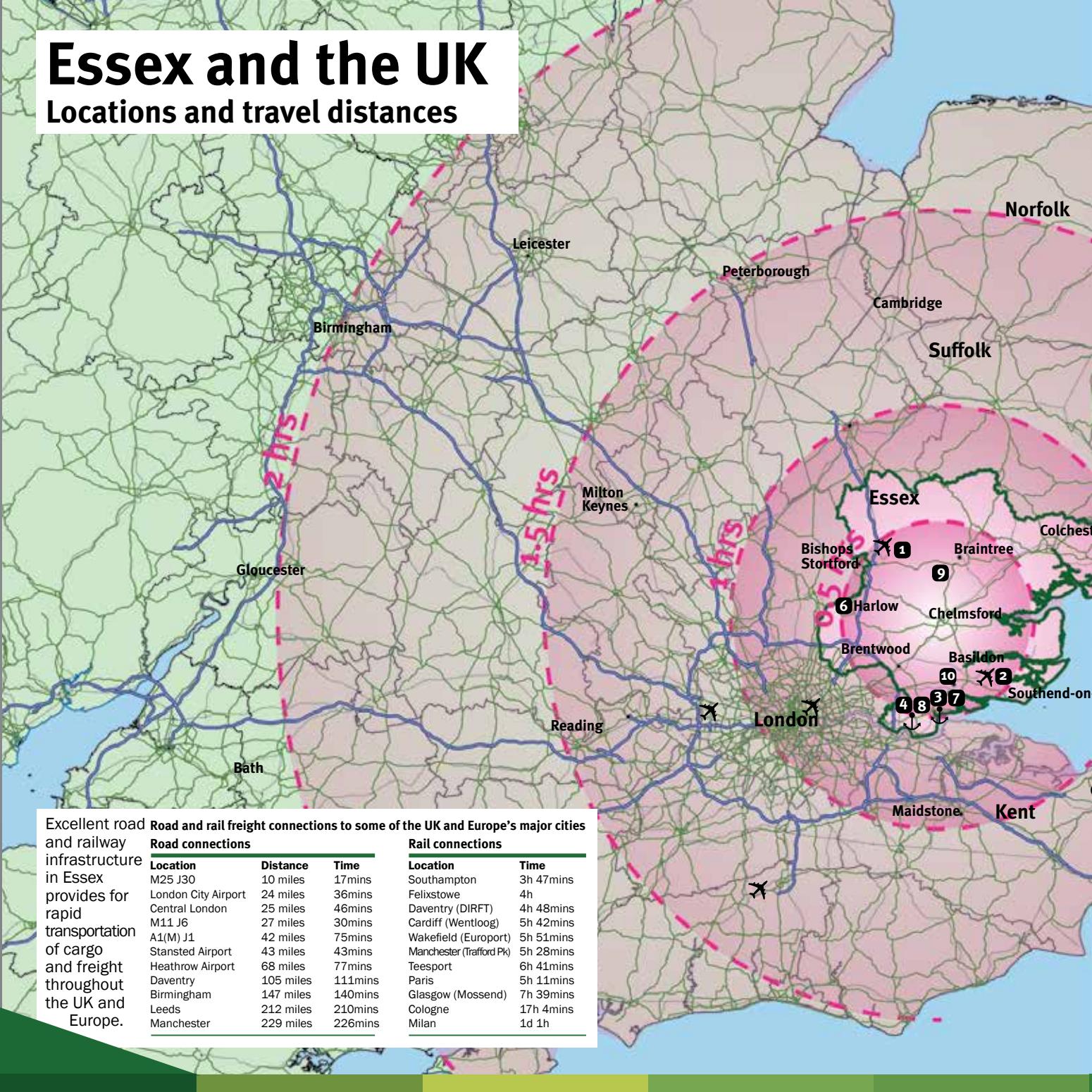
Sources:

1. fDI Markets 2010-2014
2. The World Bank, 2013
3. UNCTAD. Year of data: 2014
4. TheCityUK

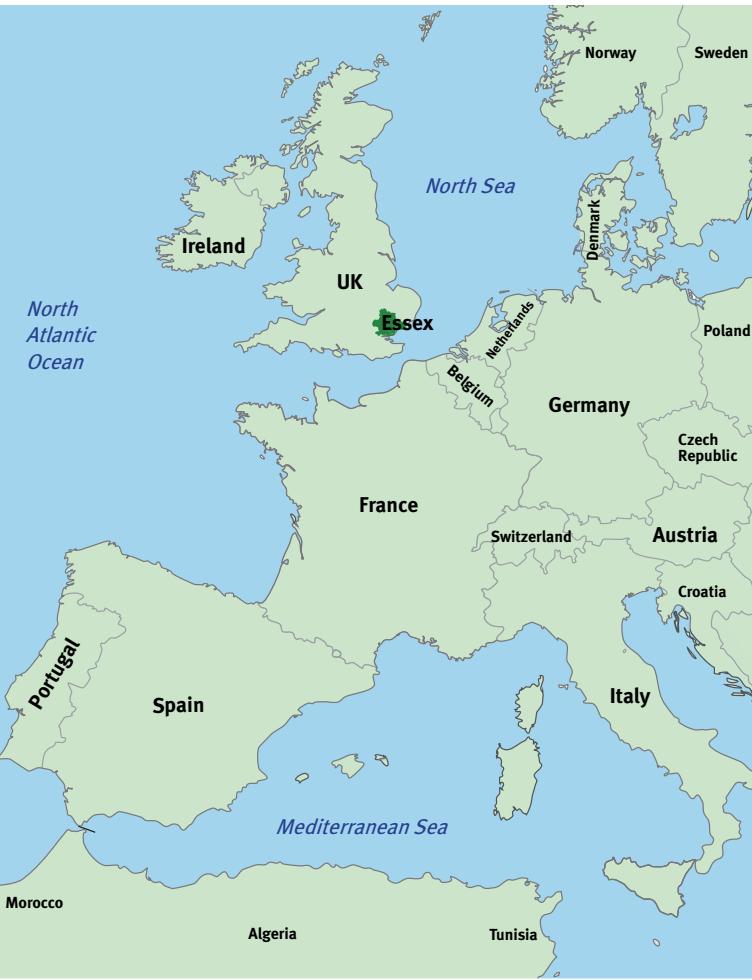
*Foreign Direct Investment

Essex and the UK

Locations and travel distances



Essex, the UK and Northern Europe



Major brands have chosen Essex as home to their distribution centres. Amongst these are Aldi, Argos, Sainsbury's, The co-operative, French Connection, Poundland, Tesco and Next.

FRENCH CONNECTION

The **co-operative**

Sainsbury's

next

TESCO

Poundland®



Infrastructure and m

1 London Stansted Airport

- 3rd largest airport in London, 4th largest airport for passenger numbers in the UK, 3rd for handling air freight in the UK.
- Located on the UK's main arterial road network, with major junctions on the M25 and M11, with direct access to the rest of the UK.
- Routes to 160 destinations in 34 countries worldwide including south-east Asia and North America.
- 600,000ft² (50,000m²) World Cargo Centre, handling 214,000 tonnes of cargo per year.

2 London Southend Airport

- Located 25 miles east of London with access to the M25 and a direct train journey to Central London and providing passenger, air cargo and aircraft maintenance services.
- Over 20 destinations in seven European countries including Amsterdam Schiphol Airport, with its global onward connections, reached in little over an hour & passengers can travel to the USA and Canada via Dublin.
- Close to mainland Europe, and outside the UK's airspace, London Southend is free from restrictions on the ground and in the air.

3 London Gateway Port

London Gateway is the UK's first 21st Century major deep sea container port located to provide access to the world's leading businesses and to the largest consumer market in Europe.

- UK's most advanced and newest deep sea container port and Europe's largest logistics hub providing fast and efficient portcentric distribution.
- Tri-modal infrastructure via sea, rail and road connection to the M25 motorway and A12 connecting directly to the UK's strategic road network.
- Situated closer to the Midlands and North East than other competing ports in the South of England.

Major distribution sites



America
Centre handling over



ger flights to the USA
e of congested London
om overcrowding both



nd road with direct
on-site rail terminal
ic rail freight network.
orth of England than
England.

4 Port of Tilbury

- Providing shipping services to all key worldwide destinations – European and deep sea lines with additional feeder connections via continental ports.
- Full portcentric provision with rail and road with direct connection to the M25 motorway and rail terminals connecting directly to the UK's strategic rail freight network.
- UK's leading port for paper products, along with forest products, grain and bulk commodities, construction and building materials, containers and Ro-Ro.
- Extending to 850 acres (344ha) with over 5,382,000 ft² (500,000 m²) of warehouse space, 34 operational berths and 7.5 km of quay.
- Largest cold storage facility of any UK port and largest bonded alcohol warehouse (including bottling plant)



5 Harwich International Port

- One of the UK's leading multi-purpose and passenger ports with specialist Ro-Ro facilities and more than 28 weekly connections to the Netherlands.
- Dry bulk handling expertise for grain, cement, salt, rice and animal feedstuffs.
- Dedicated car berth for the import and export of trade vehicles with direct road and rail connections and up to 40 acres of secure standage.
- Intermodal rail head connecting directly to the UK's strategic rail freight network.



6 DC380, Harlow

- A large logistics/industrial property providing 365,000ft² (33,910m²) of warehouse and a total of 20,000ft² (1,858m²) office accommodation set within a secure self-contained site of 14.75 acres (5.97 hectares). Located 9 miles (14.5kms) north of Junction 27 of the M25 motorway via the M11 between the Ports of Tilbury and London Gateway and London Stansted Airport.
- 11.5 metre eaves height, 24 dock level, 12 double height (with scissor lifts) dock level and 8 level access loading doors.
 - 115 metre secure yard with 60 lorry and trailer parking spaces with security gatehouse, CCTV security cameras and full sprinkler system.



7 London Gateway Distribution Park

- One of the largest logistic parks in Europe providing an international hub with tri-modal infrastructure.
- Over 9,000,000 ft² (over 836,000 m²) warehousing space across 560 acre (226ha) with 386,000 ft² (35,860 m²) of fully managed Common User Facility.
- 10 miles (16km) from the M25 J30/31 - fast dual carriageway access, 12 minutes away by road and with on-site rail terminal with direct connection to the UK's strategic rail network.



8 London Distribution Park

- Located immediately adjacent to the Port of Tilbury and the London Container Terminal which handles over 16 million tonnes of cargo per annum serving all major deep sea routes.
- 70 acres (28ha) of land for industrial and logistics development
- 6.5 miles (10km) from the M25. J30/31 - fast dual carriageway access , 8 minutes away by road and 3 rail terminals with daily connections throughout the UK.



9 Eastlink 120, Braintree

A new business and logistics park situated adjacent to the A120 with dual carriageway access to Stansted Airport 15 miles (24kms) and the M11 motorway. Planning permission for build-to-suit units of 2,000ft² (186m²) to 55,335ft² (5,140m²) together with a development site extending to 45.7 acres (18.5ha).

- Flexible design and layout provision with up to 10m clear eaves height, secure yards and loading doors.
- Freehold or leasehold tenure.



10 Gateway Basildon

- A new high profile 181,360ft² (16,850m²) development providing 2 self-contained new units suitable for light industrial, industrial or warehouse with dock and level loading doors and separate secure yards.
- Unit 1 provides 109,262ft² (10,150m²) and unit 2 provides 72,097ft² (6,698m²).



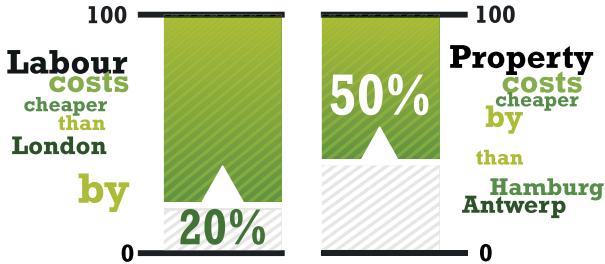
Major cost savings

Essex is up to 20% cheaper with regards to labour costs for a typical logistics operation when compared to London and up to 50% cheaper than operations located in Hamburg and Antwerp.

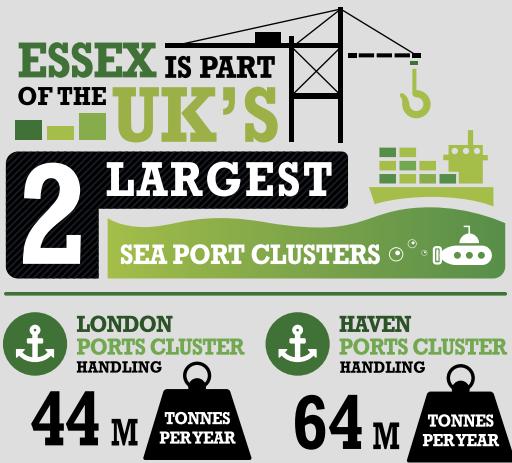
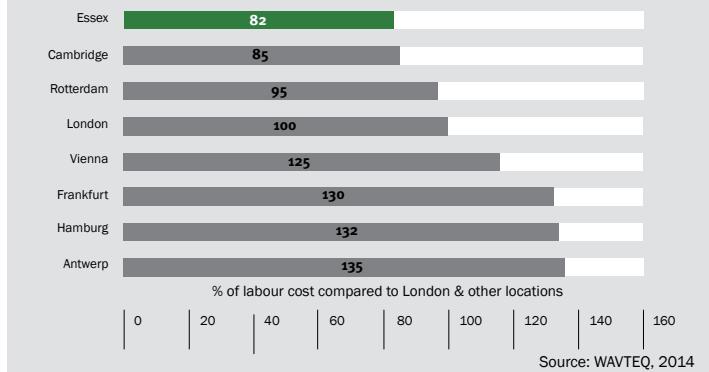
Ideal location to supply port-centric solutions to London and Greater South East

A logistics location in Essex enables cost effective direct distribution of imported cargo to reach almost 50% of the UK's GDP and 35% of its population within 2.5 hours' drive by truck, offering a greener solution involving fewer journeys and less intermediate handing. Essex also offers three ro-ro routes to ports at the heart of the Dutch and Belgian transport network, facilitating 24hour transport to and from these countries and much of Germany.

Major cost advantages



Labour cost comparison for a 190 person logistics centre, 2014 (London =100%).



Abundance of talent

Experienced industry-specific workforce

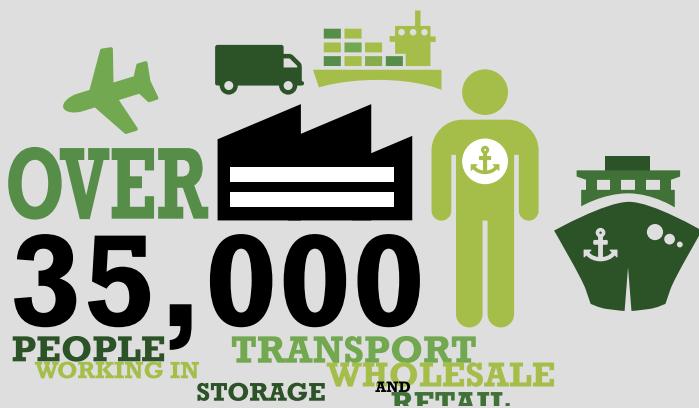
Essex has a talent pool of 35,000 people working in port, logistics and related activities in Essex.

Skills and education

The two universities in Essex have graduate courses in subjects including Supply Chain Management, Transport and Logistics, giving investors access to a highly talented, youthful workforce.

The University of Essex is placed in all major university rankings including the Academic Ranking of World Universities 2013, The Times' World University Rankings 2013-2014 and the QS World University Rankings 2013.

South Essex College in Thurrock offers a Diploma in 'Business, Logistics and Supply Chain' reflecting the strong presence of logistics associated activites in the area.



A 2012 Essex Business Survey found that 75% of Port and Logistics companies agreed that . . .

"Essex is a superbly positioned, strategic location in the south-east of England"

"Access to national and international logistics and transport infrastructure is a benefit of doing business in Essex"

What companies are saying about Essex

"Our close proximity to London allows us to deal with many international businesses and organisations who recognise the benefits of our strategic location in Essex. The building of the new London Gateway container port will only strengthen this."

Paul Stone, Uniserve Group

"Having two international seaports and an airport in the county gives us good access to our major markets. For UK deliveries, we're close to major trunk roads and the M25 with links to the national motorway network."

Anthony Knight, Martindale Pharma

"The benefits of being located in Essex for a business like ours are proximity to Felixstowe and the international port, proximity to London and good distribution networks to the rest of the UK."

Les Hall, Velta International Limited

Major investors in Essex ...



HUTCHISON WHAMPOA LIMITED



Forth Ports PLC



SCHENKER



DP WORLD

KUEHNE+NAGEL

Stobart Group

FedEx®



Global. Local. Personal.
CANUTE
GROUP

Contact INVEST Essex

INVEST Essex provides free business growth and research support, property searches and solutions, assistance in establishing networks, guidance on alternative sources of finance, and recruitment linkages.

We act as a single point of contact to help identify the right contacts in local government to address infrastructure, utilities, transport networks, planning and other start-up/operational issues.

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