

Thames Gateway London

The Logistics Location



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Logistics Opportunities in Thames Gateway London

- Easy access to the rest of the world
- The UK's largest market on the doorstep
- Access to logistics infrastructure
- Access to technology
- Access to quality sites and properties
- The world's most diverse labour pool of over 7.6 million

Thames Gateway London – The Logistics Location

London is both a global logistics centre and a major market in its own right.

Locating in Thames Gateway London, to the east of the City, makes good business sense for transport, distribution and logistics companies; offering competitive site opportunities with superb port and road access on the doorstep of one of the worlds largest and most developed markets.

Thames Gateway London is a Central Government priority area for regeneration, and continuing investment in infrastructure, education and raising skills make this an exciting and logical option for logistics relocations.





Thames Gateway London's Advantage

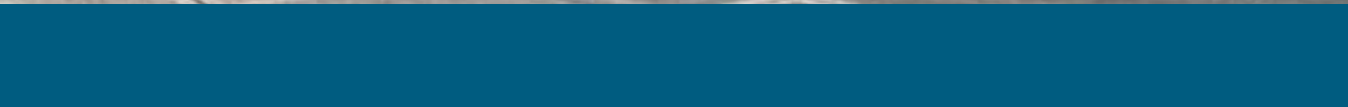
London offers easy access to the rest of the world, with connections in all directions via first class rail, road, sea and air hubs.

Thames Gateway London's infrastructure is the fastest improving in the UK, opening a world of opportunity for logistics, with cost competitive industrial space right on your customers' and suppliers' doorsteps. The sheer size of the London retail, industrial and business sectors make it a globally significant market in its own right, with 30% of the UK's consumers within a 2 hour drive.

As well as being a prime location, London has the access, IT infrastructure, skills, business support services and competitive environment for global logistics control centres to succeed. Thames Gateway London has the right conditions and most importantly, the space, for your business to expand and grow.

London offers an unparalleled labour pool of 7.6 million people and is home to 300,000 students.

A wide range of financial assistance is available for those locating in Thames Gateway London, from training grants to recruitment initiatives.





Central location with superior global access

Ranked 'best city in terms of external transport links'¹ London is extremely well connected to UK, European and global consumer and business centres. Locating in Thames Gateway London enables direct access to major industrial areas, the Port of London and the M25 and M11 through to the national motorway network. It is also a natural distribution point for goods coming in from Europe via southern England.

The gateway to and from the markets of London and the South East of England, the Port of London:

- is within only two hours travelling time of 30% of the UK population, who enjoy 35% of the UK's gross domestic product.
- handles over 50 million tonnes of cargo a year and is one of the three largest UK ports.
- receives more than 12,500 commercial vessels each year.
- comprises the entire tidal Thames, from Margate/Clacton-on-Sea to Teddington – some 150 km (95 miles) in all. It includes 91 wharves and terminals, of which 73 are presently operational.

More than 80 terminals situated along the river Thames are geared to handle every type of cargo for import and export; including container cargo and bulk cargo roll on roll off, strengthening London's key position as one of the leading European and world ports for international shipping.

For deep-sea container services, a recently extended riverside berth now provides Tilbury Container Services (TCS) with 600 metres of berthing space, allowing two of the largest panamax ships, or a combination of feeders and mothership, to be handled simultaneously.

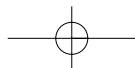
Competitive port tariffs and good berthing facilities are leading many companies including P&O Nedlloyd's Lambada service, TCS, Mediterranean Shipping Company (MSC) and United European Car Carriers (UECC) to transfer their routes to London in preference to other UK ports.

The next few years will see a major development in Thames Gateway London's importance in the logistics field. The 'London Gateway' DP World £1.5 billion development on the north bank of the Thames estuary in Thurrock will create one of the UK's most important commercial and distribution hubs.

The new facility will include a 2,300m long container quay with a final capacity of 3.5 million TEU/year and a ro-ro berth able to handle two vessels with stern/bow loading simultaneously. It is anticipated that the first container berths will be operational by the first half of 2008.

This new global logistics centre will include 10 million sq ft (947,101 sq m) of state of the art commercial and distribution accommodation providing solutions for even the largest National and Regional Distribution Centres demanded in today's market place, including rail-connected warehousing units.

¹ Source: Cushman & Wakefield Healy & Baker European Cities Monitor 2005



In addition to the major international airports of Heathrow, Stansted, Luton and Gatwick, London City Airport, at the centre of Thames Gateway London, offers direct flights to most business destinations. Executives based here can leave their offices, rapidly check-in to the uncongested London City Airport and be in the business districts of Brussels, Frankfurt and Paris within 2 hours.

The area also has the fastest improving transport infrastructure in the UK:

- The upgraded A13 is now of motorway standard, linking Docklands to the M25 within 15 minutes.
- The Channel Tunnel Rail Link, opening in 2007, will provide a new transport hub in Thames Gateway London at Stratford. Journey times to Paris and Brussels will be slashed to 2 hours 15 minutes and 2 hours respectively. The new link will bring companies even closer to Europe with up to 14 Eurostar trains to Paris and 10 to Brussels each day.

- The proposed Thames Gateway Bridge linking Beckton in the North of Thames Gateway London with Thamesmead in the South will cut the time required for local journeys across the river by up to half an hour. The link will improve access to markets and labour, boosting business opportunities and opening up development sites.

All our locations benefit from fast connections to London's vast commuting infrastructure, with the rail network in particular providing high accessibility for our major labour catchments.

London has the most comprehensive internal public transport links of any city in Europe – a total of 570 local railway stations, 292 tube & light rail stations and over 700 bus routes.

The Docklands Light Railway provides fast frequent passenger services linking the City of London, Canary Wharf and London City Airport with the many residential areas. An extension across the river to Woolwich is currently under construction and further extensions are planned widening the network to Dagenham.



A globally significant market

Locating in Thames Gateway London is a logical choice for distributors seeking short supply chains into one of Europe's largest markets:

- London's economy - at £165 billion – is equivalent to that of many developed countries such as Sweden and Switzerland and accounts for almost 17% of the UK's GDP.
- London offers unrestricted access to 459,500,000 consumers in the EU, making it one of the biggest trading hubs in the world.
- London's retail sector is globally significant with over 41,000 shops, employing over 400,000 people.

Similarly, the actual scale of manufacturing undertaken in London is sometimes surprising to those unfamiliar with the city:

- With an output of £13.6 billion, over 9% of all UK manufacturing is undertaken in London.
- There are 20,000 manufacturing firms in London and 4,500 in Thames Gateway London.

Surprisingly cost competitive

Recent independent benchmarking by Tenon Techlocate² has found that in addition to the high quality and added value of Thames Gateway London locations, distribution costs are lower than in many other European locations.

Corporation tax, at 30%, is amongst the lowest in the European Union

The Learning & Skills Council London East works directly with local employers to address skills gaps in the workforce and provides financial support to cover both the cost of training and the time a member of staff spends out of the office.

² Tenon is a leading professional services group targeted at the mid-market, including entrepreneurial and mid-sized businesses, independent organizations and private clients.

A natural location for business growth

London's huge financial markets and presence of venture capitalists make it a natural location for fast growing companies. London's financial market is known not only for its scale but for the wide range of specialist investors and high technology specialists active in 'the City' and London Docklands.

London is Europe's principal business centre; 486 overseas banks, more than any other city in the world, have a presence in London and 108 of Europe's 500 largest companies have their headquarters here.

The London Foreign Exchange Market is the largest in the world, averaging a daily turnover of £504 billion, accounting for 32% of global turnover, more than New York and Tokyo combined.

The London Stock Exchange is the most international of all exchanges with 350 companies from over 50 countries trading on our markets.





Access to highly skilled and productive workers

With a labour pool of 3.6 million and a further 4 million in the surrounding region, London is able to supply not only highly educated, but well trained trades people and warehouse staff.

Labour is highly available in Thames Gateway London ensuring competitive staff costs, and unlike the traditional logistics areas of the Midlands, companies do not face recruitment difficulties due to workforce saturation.

In addition to the advantage of London's 28 universities and 12 Royal Colleges currently educating over 300,000 students, significant training and recruitment assistance is offered to companies locating in Thames Gateway London.

Logistics is a growing area of expertise in the area with the London Metropolitan University offering a BA Hons in Transport & Logistics.

Government is committed to maintaining the economic importance of London as a World City and has recognised that if London is to retain its competitiveness it must grow to house new workers.

Thames Gateway London has been identified as the primary location for population growth, accommodating much of London's predicted increase of 800,000 by 2016 due to migration from Europe and other parts of the UK.

Thames Gateway London has the lowest overall employment costs of anywhere in London and one of the lowest in Southern England.



Thames Gateway London's advantage for logistics command hubs

New EU legislation limiting HGV drivers' hours came into force in the UK in March 2005. Thames Gateway London is ideally positioned to provide strategic logistics opportunities under these new restrictions. Unlike the traditional logistics clusters in the East and West Midlands, which are beyond the new drive-times from major sea ports, Thames Gateway London offers an optimal location.

London is one of the best-wired global cities. It was recently ranked as the best city in Europe for the 'quality of its telecoms'³. Companies have multiple choices in their telecom service provision and broadband access is a standard feature in all facilities on offer.

Companies requiring reliability and speed with their internet and data hosting services have an advantage if they locate in Thames Gateway London as it is home to the London Internet Exchange (LINX), carrying over 96% of the UK's internet traffic. Also located here are Global Switch and Telehouse, the UK's most important Internet Telephone Exchanges.

London is a leader in wireless technology; Orange and Sony Ericsson both have their corporate headquarters in London, it also has a very competitive market for IT staff with in excess of 330,000 dedicated IT workers.

Assistance for companies entering the market

Gateway to London provides investors in Thames Gateway London with everything they need to maximise opportunities and benefit from the energy and momentum of this unique area.

We are well networked in the market place, in a central position to advise you on opportunities and work with a wide range of partners to develop a market entry plan specific to your needs and circumstances.

Our services are free of charge and confidentiality is always maintained.

³ Source: Cushman & Wakefield Healy & Baker European Cities Monitor 2005



High availability of quality sites

Thames Gateway London offers a broad range of affordable premises and industrial sites with high amenity.

Masterplans are in place to direct potential uses and Planning Authorities are actively supporting new investment into the area.

Rental prices are typically 30 - 35% less than those of West London with all the benefits of a London location.

Source: King Sturge, UK Industrial & Distribution Floorspace Today, November 2005

Rental price per sq ft small warehouse property

	THAMES GATEWAY LONDON	WEST LONDON (HEATHROW)
Prime	£8.25	£13.50
Secondary	£5.00	£8.50

large warehouse property

	THAMES GATEWAY LONDON	WEST LONDON (HEATHROW)
Prime	£8.00	£12.50
Secondary	£5.00	£8.00

Locations



Available Warehouse Properties

- 1 VOLTAIC, DAGENHAM
- 2 BRONZE AGE PARK
- 3 QED PARK, THURROCK
- 4 PROLOGIS PARK, BARKING
- 5 THAMES GATEWAY PARK, DAGENHAM
- 6 BINARY PARK, DAGENHAM

Design and Build Opportunities

- A WHITE HART TRIANGLE

Available Warehouse Properties

1

Voltaic, Dagenham



Size: 232,965 sq ft

Tenure: Leasehold £7.50 per sq ft

Description: Voltaic is a new high bay logistics facility by Gazeley located adjacent to the newly improved A13 in Dagenham. Built to Gazeley's EcoTemplate, the building is a first for the area, and includes solar photovoltaic roof panels, 15% roof lighting, ground source heat pump and rainwater collection designed to reduce both occupational costs and CO2 emissions.

Accessibility: Forming part of the Dagenham Dock development, Voltaic is easily accessible from the A13 via the new Goresbrook interchange. By road the site is 6 miles from Junction 30 of the M25, 3 miles from the A406 North Circular, 15 miles from the port of Tilbury to the east and 10 miles from Central London to the west via the A13. Dagenham Dock mainline station is a 2 minute walk, providing services to Fenchurch Street in 20 minutes.

Amenities: The development is close to a number of river wharfs and railheads which are available to use through agreement with operators.

Occupiers: Adjacent occupiers include British Bakeries, TDG and Britvic

2

Bronze Age Park, Belvedere



Size: 85,000 – 425,000 sq ft

Tenure & Rent: Leasehold circa £7.50 per sq ft

Description: This new development, located on the former Pirelli site in Belvedere, will provide bespoke industrial warehouse facilities to meet occupier requirements from 85,000 sq ft to circa 425,000 sq ft. The area has a strong industrial history and the site forms a major part of the regeneration taking place in the area with other new industrial developments located near by.

Accessibility: Bronze Age Park is located 5 miles from M25 junction 1a and 15 miles east of Central London. The proposed Thames Gateway Bridge will improve accessibility to the area and the new Crossrail line is due to stop at the nearby Abbeywood Station. Currently, rail links into central London are excellent with high frequency services direct to London Bridge, Cannon Street and Charing Cross.

Occupiers: Nearby occupiers include Europa Worldwide Logistics, ADMI, Iron Mountain, Asda and Office Depot

3

QED Park, Thurrock



Size: 37,256 to 300,650 sq ft

Tenure & Rent: Leasehold £7.75 per sq ft

Description: QED offers up to 300,650 sq ft of warehouse or production accommodation divided into three separate units of 103,650, 103,590 and 68,943 sq ft, all of which have been constructed to a high specification with quality finishes. The design of the scheme allows the units to be subdivided to provide space from 37,265 sq ft, offering occupiers maximum flexibility.

Accessibility: QED is located just inside the M25, 2 minutes from its junction with the A13. The location offers easy access both to central London, the North and the rest of Europe. Tilbury Docks are approximately 15 minutes drive.

Occupiers: Tesco, DSL Distribution Services, Lafarge, DFDS Transport and P&O

4

Prologis Park, Barking



Size: 270,000 sq ft

Tenure & Rent: Leasehold £7.25 per sq ft

Description: Providing a new build high bay warehouse/industrial unit with 22 dock levelers, 6 level access doors and 13,500 sq ft of office accommodation over 2 floors.

Accessibility: Located in an established industrial area Prologis Park has immediate access to the newly upgraded A13 via River Road. By road the site is approximately 8 miles from Junction 30 of the M25, 1 mile from the A406 North Circular, 17 miles from the port of Tilbury to the east and 8 miles from Central London to the west via the A13.

Occupiers: Adjacent occupiers include Wincanton, TNT, ALBA and UPS

5

Thames Gateway Park, Dagenham**Size:** 25,000 to 65,000 sq ft**Tenure & Rent:** On application**Description:** Thames Gateway Park is a new 40 acre (16 hectare) manufacturing and distribution development by Ravenbourne and Standard Life. Located on a new access road to the A13 this highly successful development offers units from 25,000 to 65,000 sq ft on phase three of the park.**Accessibility:** Thames Gateway Park is easily accessible from the A13 via the new Goresbrook interchange. By road the site is 6 miles from Junction 30 of the M25, 3 miles from the A406 North Circular, 15 miles from the port of Tilbury to the east and 10 miles from Central London to the west via the A13. Dagenham Dock mainline station is a 2 minute walk, providing services to Fenchurch Street in 20 minutes.**Amenities:** The park is close to a number of river wharfs and railheads which are available to use through agreement with operators.**Occupiers:** British Bakeries, TDG and Britvic

6

Binary Park, Dagenham**Size:** 138,707 - 175,000 sq ft**Tenure & Rent:** Leasehold £7.95 per sq ft**Description:** Binary Park is a new 15.6 acre industrial and distribution development by Graftongate. Situated in a high profile location adjacent to the A13, the park comprises 2 high spec units of 138,707 and 175,000 sq ft.**Accessibility:** Binary Park is easily accessible from the A13 via the new Goresbrook interchange. By road the site is 6 miles from Junction 30 of the M25, 3 miles from the A406 North Circular, 15 miles from the port of Tilbury to the east and 10 miles from Central London to the west via the A13. Dagenham Dock mainline station is a 2 minute walk, providing services to Fenchurch Street in 20 minutes.**Amenities:** The park is close to a number of river wharfs and railheads which are available to use through agreement with operators.**Occupiers:** Adjacent occupiers include British Bakeries, TDG and Britvic**Design and Build Opportunities**

A

White Hart Triangle**Size:** 14,000 - 225,000 sq ft**Tenure:** Virtual Freehold or Leasehold**Description:** White Hart Triangle comprises in excess of one million sq ft of new warehouse, distribution, industrial and office units over 50 acres (20 hectares) of previously unused land in an established industrial area of south east London. The £80million project is a joint venture between Tilfen Land, the London Development Agency and Greenwich Council. Design and build packages are available on a leasehold or freehold basis.**Accessibility:** With an ideal strategic location in the heart of the Thames Gateway companies can service both the City and West End whilst having the benefit of easy access to the M25 and the national motorway network. Connections will be further improved when the Docklands Light Railway extension and proposed Thames Gateway Bridge are completed.



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Gateway to London is the Inward Investment & Business Retention Agency for Thames Gateway London. We are a public/private sector partnership, funded by the London Development Agency, the European Regional Development Fund, Department for Communities and Local Government, Local Authorities and other private sector partners.



The LDA prepares the Mayor's business plan for London and mobilises the support and resources of hundreds of partner organisations to help build a thriving economy for London's people, businesses and communities.