EXECUTIVE INSIGHT

LOGISTICS UK

No 33
November
2026



MARITIME MATTERS

Interview with

★★★

TOM WHITE

DIRECTOR OF THAMES FREEPORT

★ **FROM WORKFORCE TO CAPABILITY**
Building the skills that drive logistics growth

★ **GLOBAL TRADE INSIGHTS**
A report on a recent dinner discussion on global trade

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Revealing logistics' true impact



I was delighted to see so many Executive Members attend the Parliamentary launch of *UK logistics: a critical driver of growth and investment* report produced by our partners Capital Economics last month. As I said at the event, one of the best things that Logistics UK does is to challenge people's perceptions about the sector. This report manages to reveal the true scale and impact that logistics has on the growth and productivity of the wider economy.

In the coming weeks we will be launching our next Executive Member Insight Report on the topic of energy and infrastructure at our Delivering Decarbonisation conference in London. Based on insights gleaned from 14 in-depth interviews, this report will show how energy and infrastructure are key to enabling the decarbonisation of logistics in the critical years that lie ahead.

I do hope you will get the opportunity to join us at this conference and listen to our speakers, all experts in their field, share their thoughts on this important topic.

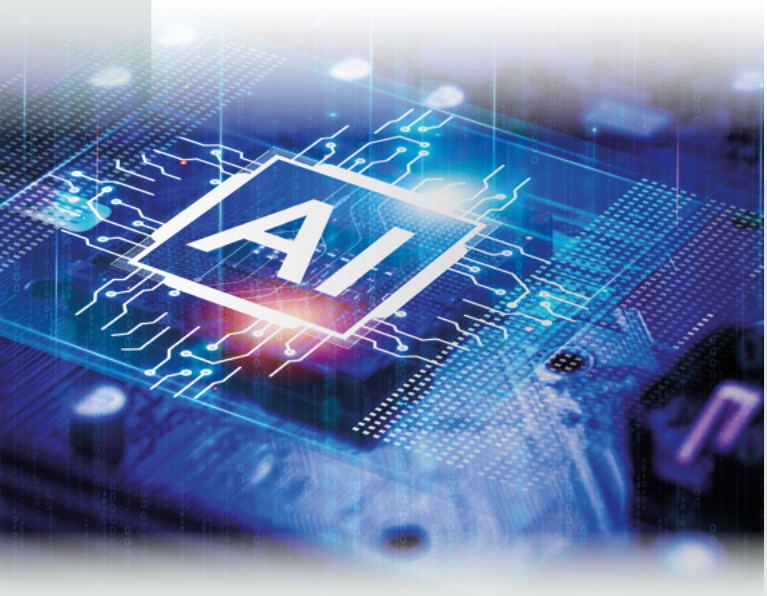
Phil Roe,

President, Logistics UK

EXECUTIVE DINNER: CYBER SECURITY IN LOGISTICS AND SUPPLY CHAINS

As logistics and supply chains become increasingly digitised, cyber resilience has never been more critical. From operational disruption and ransomware attacks to risks across interconnected supply networks, organisations face a growing range of cyber security challenges. ■

Find out more



EXECUTIVE LUNCH: NAVIGATING THE AI SHIFT

This executive lunch will bring together senior leaders for an open discussion on how organisations are navigating AI adoption in practice. The conversation will explore how businesses can gain visibility of the AI tools already being used across their organisations, protect intellectual property and business-critical information and establish the guardrails needed to support responsible innovation. ■

Find out more

DELIVERING DECARBONISATION 2026

This conference brings together leaders from across the logistics, transport, energy and infrastructure sectors to explore the practical steps needed to accelerate the UK's transition to net zero. Through a focused programme of policy updates, real world case studies, technical deep dives and cross modal insights, the conference equips logistics businesses of all sizes with the knowledge, tools and guidance to reduce emissions and carbon footprint while maintaining efficiency and competitiveness. ■

Find out more

Budget contains important outcomes for the logistics sector

The first Budget to be delivered by the new Chancellor of the Exchequer, John Healey MP, on 28 October 2026, contained some important outcomes for the logistics sector. Principally, the extension of the Fuel Duty freeze and support for red diesel until July 2027 were well received by leaders in the industry.

Ben Fletcher, Chief Executive of Logistics UK, said: "The government's decision to retain the 5p per litre cut in Fuel Duty is a wise decision which will help keep trade moving, support growth across the economy and avoid adding further inflationary pressures. We are delighted that the Chancellor has listened to Logistics UK's strong case for maintaining the duty cut at a time of global uncertainty and rising costs for businesses and consumers."

Logistics UK also welcomed measures in the Budget aimed at accelerating growth across the UK, while setting out how its members are uniquely positioned to unlock regional growth, address the NEETs crisis and drive the government's reindustrialisation agenda.

"The government's ambition for growth in every postcode aligns with the role the logistics sector already performs across the UK," Fletcher remarked.



"Independent research shows that every £1 of economic activity directly generated by the logistics sector more than doubles its value, to provide a further £1.04 across the wider economy."

The trade body is also encouraged by measures in the Fiscal Devolution Roadmap, published alongside the Budget, that could incentivise regional mayors to support logistics development, by enabling them to keep a share of business rates. ■

Find out more

How to drive the economy to double its money – according to new report from Logistics UK

Every £1 of economic activity directly generated by the logistics sector more than doubles its value, to provide a further £1.04 across the wider economy, according to new research from Logistics UK. The report, produced in association with Capital Economics, also indicates that a 1% increase in logistics' share of the economy could attract £30 billion of foreign investment into the UK – equivalent to more than £1,000 per household. According to the new research, the logistics sector underpins £356 billion of economic activity, 5.3 million jobs and £65 billion in tax revenues across the UK, as well as enabling more than £1 trillion of international trade every year.

The findings are part of the report's research which examines the indirect, induced and catalytic impact of the logistics sector on the UK economy. The modelling, from independent macroeconomists Capital Economics, launched on 27 October at the Houses of Parliament on the eve of the Budget, shows that the sector's economic impact extends well beyond its £175 billion direct annual contribution, and that logistics businesses and workers contribute an additional £181 billion to the economy


CAPITAL ECONOMICS

LOGISTICS UK

OCTOBER 2026

UK logistics: a critical driver of growth and investment

A summary of a report commissioned by Logistics UK from Capital Economics assessing the indirect, induced and catalytic impact of the logistics sector on the UK economy

Nothing moves without logistics. Logistics UK analysis shows the sector directly contributes £175 billion in GVA annually and employs 8% of the UK workforce, providing good jobs with strong career progression in communities across the country. This is comparable to, and in some cases larger than, construction, manufacturing, and financial and professional services.

Logistics is critical to growth across the UK and is fundamental to our way of life, delivering for homes, businesses and public services every day, and enabling over £1 trillion of international trade.

Logistics UK asked Capital Economics to look at the wider economic importance of logistics by examining the impact of supply chains, employee spending and wider tax contributions.

The sector's economic contribution extends far beyond logistics businesses

A stronger logistics sector means a stronger economy, supporting growth through supply chains, household spending and increased investment.

Capital Economics' analysis shows that the sector's direct, indirect and induced impact totals:

GVA £356 billion | Jobs 5.3 million | Tax £65 billion

Breakdown of economic contribution by impact (2024)

Outer ring shows jobs and tax supported by impact channel. Inner ring shows GVA by impact channel.

Capital Economics, October 2026

The logistics sector's wider economic impact (2024)

Impact through supply chains

Spending by logistics businesses with UK suppliers generated £91 billion in GVA and supported 1.5 million jobs.

Impact through employee spending

Spending by logistics employees supported £90 billion in GVA and 1.1 million jobs across the UK.

Indirect and induced tax contribution

The logistics sector supported £34 billion in tax revenues through its supply chains (£19 billion) and employees' spending (£15 billion).

Powerful multiplier

Every £1 of GVA generated by logistics created an additional £1.04 in the wider economy through its supply chains and employee spending.

Every 100 logistics jobs supported a further 96 jobs through supply chains and employee spending.

each year through their own personal spending activity.

"My message is that the logistics sector doubles your money," said Logistics UK's Chief Executive Ben Fletcher, "with every £1 of economic activity generated by our sector delivering a further £1.04 through its supply chain and employee spending.

"When considered alongside the sector's direct financial contribution, significant tax contributions and role as a major employer, it is clear that

logistics is not simply a critical sector in its own right, but an enabler of prosperity across the whole economy. These findings demonstrate why supporting the conditions for logistics businesses to invest, grow and operate efficiently should be a top priority for the government as it seeks to boost growth in every postcode."

As revealed in detail in the report *UK logistics: a critical driver of growth and investment*, the spending by logistics businesses with their UK suppliers supported over £90 billion of GVA across the economy and 1.5 million jobs in 2024. Five sectors (transport, administrative services, professional services, finance and manufacturing) experienced GVA boosts of over £10 billion each due to this activity by logistics businesses. The analysis also outlines how logistics sector employees generate economic activity from their personal spending with UK businesses: this "induced" activity contributed an additional £90 billion in GVA in 2024 and supported 1.1 million jobs.

Capital Economics' research found that the logistics sector contributes £30 billion pa in tax revenue, and that the Exchequer receives a further £34 billion due to spending by logistics businesses and workers. ■

Find out more

Logistics UK responds to high CPI figures on fuel inflation

While the latest figures from the Consumer Prices Index (CPI) showed that inflation was running at the moderately high level of 3.6% in September, they also revealed that motor fuel inflation was running at 31.9% – the highest inflation rate for liquid fuels, vehicle fuels and lubricants since August 2022.

Commenting on these figures, Ben Fletcher, Chief Executive, Logistics UK, remarked: "This throws into sharp relief the financial pressure the logistics sector is under. As the ONS states, transport, particularly motor fuels, made the largest upward contribution to the increase in inflation.

"The rapid rise in fuel inflation, driven by the conflict in the Middle East, has a direct effect on logistics operating costs, which will have a knock-on impact on the prices people pay in the shops. Fuel, energy, tyres, maintenance, vehicles, insurance and labour are non-negotiable charges and, while operators will attempt to absorb some increases through lower margins and improved efficiency, much of this increase will ultimately drive further inflation across the wider economy." ■

Find out more

ZEV mandate ambition must be matched by action

Following the government's announcement of its commitment to publish its response to the Zero Emission Vehicle (ZEV) Mandate Review consultation by the end of 2026, Logistics UK is urging ministers to create an operational environment that will make electrification commercially viable and achievable for the logistics sector.

Responding to the government's consultation on the future trajectory of the ZEV Mandate for vans, Logistics UK reiterates how the sector fully supports decarbonisation and the transition to zero-emission vehicles but outlines how policy ambition must be matched by delivery.

"The logistics sector is committed to decarbonisation, and businesses are already investing significantly in electric vehicles and charging infrastructure, but government policy must reflect operational reality," commented Logistics UK's Chief Executive Ben Fletcher. "The electrification transition needs to start from the ground up to give businesses the confidence and practical means to invest in zero-emission fleets without compromising their competitiveness."

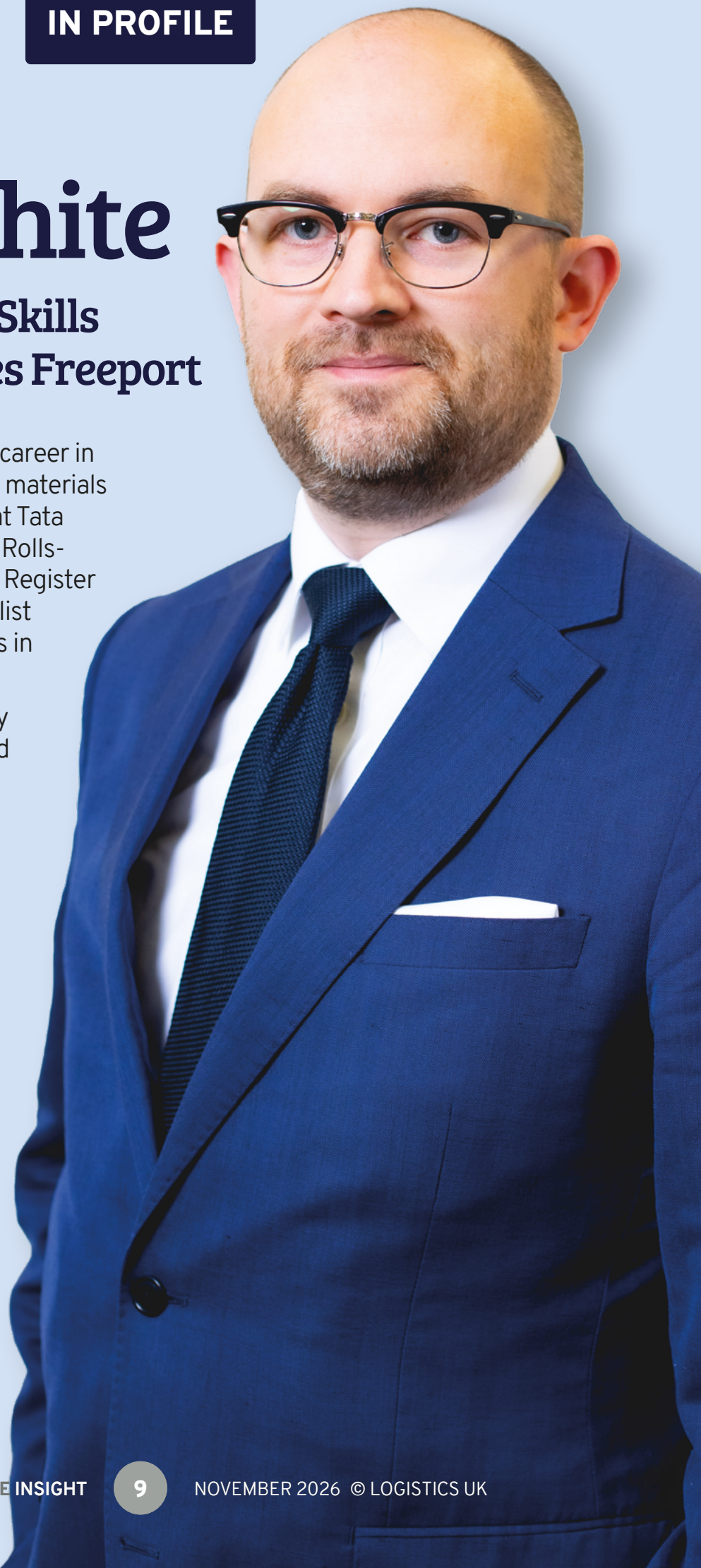
Logistics UK's submission highlights growing concerns from logistics operators and urges government to prioritise faster and more affordable grid connections for logistics sites; maintain meaningful, multi-year grants for zero-emission vans; improve accountability among distribution network operators (DNOs); expand high-powered charging infrastructure suitable for commercial vehicles and address the UK's high cost of electricity – since 2020, UK industrial electricity prices in the UK have been the most expensive in the G7.

"Electrifying domestic vehicles is a very different challenge to electrifying the logistics network of depots and distribution centres that keep the country supplied, and policy goals must recognise the different pace of decarbonisation. Logistics operators need to consider vehicle range, payload and overall customer needs, and for many businesses, particularly those with larger vans or in rural areas, conditions are not yet commercially viable. With logistics businesses operating on tight margins, the transition needs to be supported by a clear and realistic policy framework that reflects the operational challenges facing the sector. ■

Find out more

Tom White

Innovation and Skills Director, Thames Freeport



TOM White started his career in manufacturing, in the materials and defence sectors at Tata Steel (now British Steel) and Rolls-Royce, before joining Lloyd's Register in 2015 as a materials specialist and spending several months in shipyards in South Korea.

At Lloyd's Register he quickly moved into new products and services in shipping, leading one of the first assurance frameworks for maritime autonomous systems and some of the first assurance services for digital twins, predictive analytics and the cyber security of connected equipment. This taught him that new technology only gets used when people can trust it and invest in it with confidence.

At Connected Places Catapult he went on to lead the maritime and ports portfolio, which helped launch a national Freeport Innovation Network.

Tom White

After a brief time at an AI start-up, he joined Thames Freeport in 2023, which he describes as the best programme he has ever worked on: nationally significant, with world-leading partners and a real growth mission.

You joined Thames Freeport as Innovation and Skills Director in 2023. What does your current role entail? And why are these areas priorities for the Freeport?

My role is to work with our public and private stakeholders to design and deliver initiatives that make our region more attractive to business and flow the benefits of growth out to communities. We don't own or operate the sites, so almost everything we do is done with others: the three site operators, local councils, colleges, universities and our delivery partners.

A freeport is judged on investment and jobs, and innovation and skills are how you make both stick. Innovation brings in investment that wouldn't otherwise come, spreads the benefits to local businesses and keeps existing investment competitive. Skills and employment support decide whether local people get the jobs that investment creates.

What is the Thames Freeport, and what area does it cover?

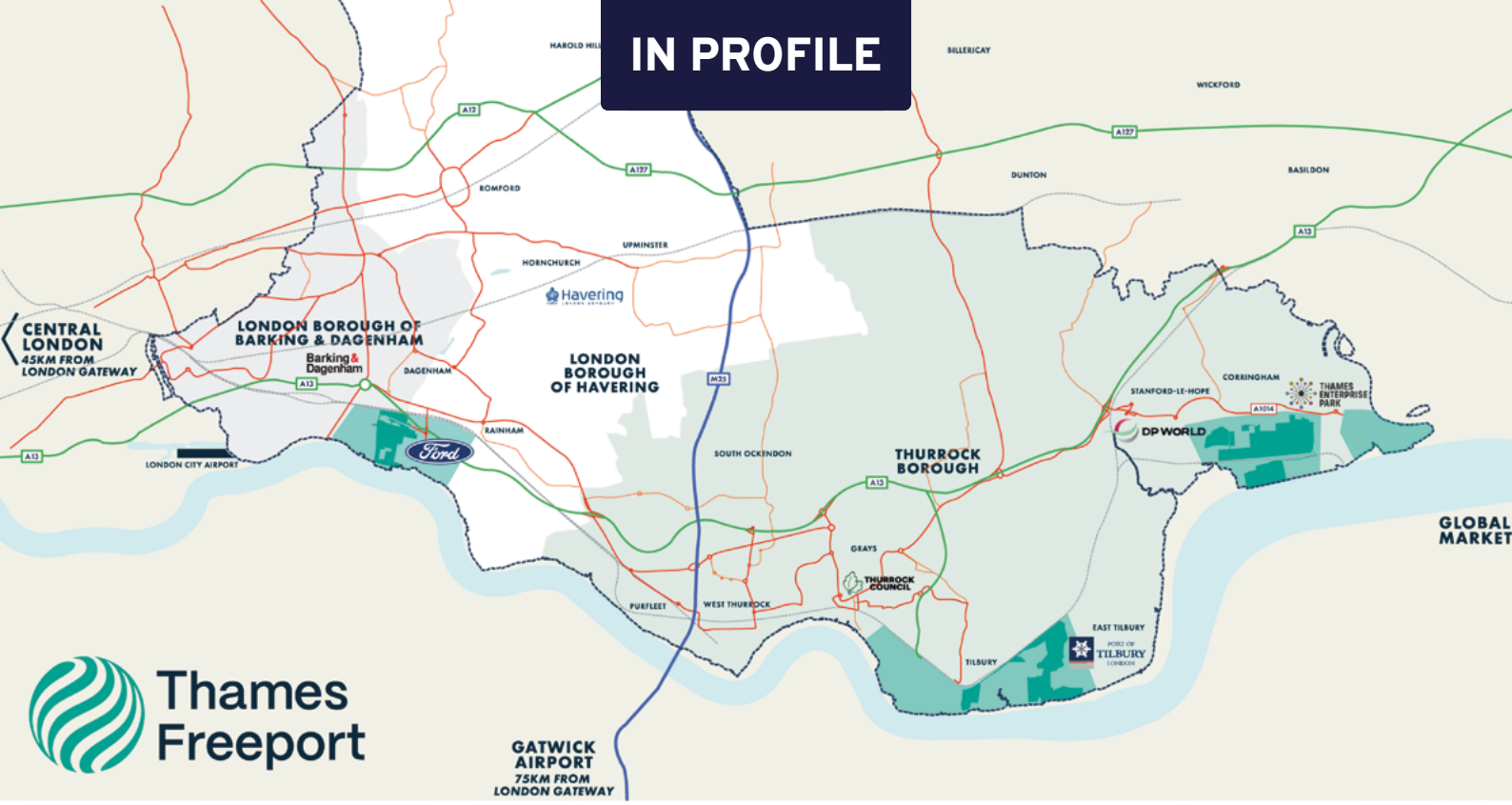
Thames Freeport is one of the UK's flagship special economic zones, built around three working industrial sites on the Thames: DP World London Gateway, a deep-sea container port; Forth Ports' Port of Tilbury, a multi-cargo port; and Ford Dagenham, which anchors advanced manufacturing. It covers Barking and Dagenham, Havering and Thurrock, home to more than 700,000 people, with ready access to more than 18 million consumers and over 40 universities.

We are a public-private partnership with a 25-year objective to deliver £4.5bn of new investment and 21,000 jobs, 12,000 of them for local people. Since designation in December 2021, more than £1.5bn has been invested and around 1,400 jobs created. In September we published our Growth Plan, setting out our plans to 2045, alongside our Impact Report.

The UK Freeports policy was a central initiative of the 'levelling up' agenda of Boris Johnson's government in 2021. How would you summarise their contribution to the UK economy over the last five years?

It's still early. Freeports are 25-year programmes, the first tax sites were only designated at the end of 2021, and big sites take years to consent, prepare and build before anyone works there.

But the early signs are encouraging. The government's 2025 Freeports Programme Report put private investment on freeport sites across the UK at £6.4bn, 89% of it foreign direct investment. The current government



has brought freeports and investment zones together as Industrial Strategy Zones, a strong commitment to the role special economic zones play in the UK's growth mission.

How has Thames Freeport contributed to the development of skills in the East London/South Essex region?

Our starting point is that logistics runs on people. Employment in the wider freeport area grew 18% between 2015 and 2024, against 10.3% nationally, but unemployment in some areas is still around twice the national average.

So we treat skills as part of our investment offer. Investors want to know their future workforce can be found and trained locally, so we work with employers and partners including CEME, Barking and Dagenham College, South Essex College and New City College to build provision around the jobs that are coming. Our Impact Report shows £7.1m invested in skills so far, reaching more than 4,500 pupils, with 609 apprentices in training, and the Growth Plan sets an ambition of 3,500 apprentices by 2030.

AI is the next big shift: through AI Unlocked, more than 40 small businesses and our first 20 senior leaders are putting AI to work. And our Community Skills Fund backs local organisations that reach the residents furthest from work.

Thames Freeport has partnered with the corporate innovation specialist L Marks on the Ports & Logistics Innovation Lab. Can you give an outline of what this project involves? And how you have worked together to achieve innovative success in the Freeport?

L Marks is our Strategic Innovation Delivery Partner, so the relationship is wider than one lab: they deliver across our innovation portfolio, including health and public services with PUBLIC

Tom White

and Avencera. But ports and logistics is where it started.

The model is challenge-led. The sites define a problem or opportunity, L Marks finds and assesses the best solution providers globally, and the companies selected prove their technology on site. We build the return-on-investment case with the site, and the site decides whether to scale.

The first round, the Connectivity Lab, ran alongside the private 5G demonstrator network we funded at all three sites: more than 800 companies scouted worldwide, eight selected from seven countries, and nine live trials. The Ports & Logistics Innovation Lab follows the same model, with new challenges from the sites on vehicle and yard visibility, the logistics park and predicting equipment failure. It drew 132 applications, and trials are now under way.

You recently spoke at our Digital Transformation in Logistics conference on the collaboration between Thames Freeport and L Marks. How would you advise logistics businesses begin to get involved in innovation-led partnerships/collaborations?

Start with your business and operational problems, not the technology. Innovation is often confused with invention, but it isn't about the technology you deploy; it's about value creation.

Find partners who will work with you. Logistics is a complex, interconnected system, and live operations, real data and how things work at the interfaces show you what an isolated demonstration never will.

Bring the decision-makers in early, so a trial ends in a decision rather than a report. And be clear from the outset about what you're trying to achieve and how you'll measure whether you've succeeded.

What key learnings and outcomes have come from investing in innovation at Thames Freeport? What advantages are there for local communities from these investments, and how do you measure success?

The biggest lesson is that innovation is one of the most powerful tools we have for bringing in investment. Our own funding is deliberately small; what matters is what it unlocks: operators adopting new technology, companies coming to sell to them, and the investors who follow. We also design every programme for exit, and our ports and logistics and retrofit programmes are now handing over.

For communities, the benefits come through jobs, skills, health and better public services. Our AI in primary care programme put six AI tools live in 18 GP practices in Barking and Dagenham, and clinicians reported admin time falling from 30 to 40% of the working day to 10 to 20%.

We measure success on investment first: what our programmes draw in against what we spend, and the investment prospects they bring into the pipeline. Alongside that we track contracts signed, companies choosing to locate or grow here, and local people moving into good jobs.

Do you have any specific examples of where your investment in innovation has led to a tangible benefit for local businesses?

Definitely. Small firms going through AI Unlocked are putting AI to work straight away, some reporting efficiency gains of around 40%, and our Adult Social Care Accelerator helped deploy eight new care technology solutions with three councils.

With our anchor partners, live trials have cut incident coordination times by around three quarters in exercises, put the gain in gate processing at around 20%, and used computer vision to spot damage that human inspectors had missed. Our construction work has created new financing models that will enable upgrades to thousands of homes, and in 2025/26 alone our skills programmes trained almost 800 people and supported 120 apprenticeship starts.

Looking ahead, how do you see the maritime sector evolving over the next five years in the innovation, skills and net zero space?

I think we'll see three big shifts. The first is a much sharper focus on resilience and interoperability. The pandemic, Red Sea diversions, cyber attacks and localised conflicts have shown how exposed international supply chains are. Resilience increasingly means visibility and choice: knowing where cargo is across the whole journey and being able to switch routes, modes and partners quickly. That needs systems that talk to each other and connectivity that moves as freely as the cargo. It also needs grid capacity, because electrified ports and fleets are only as dependable as the power behind them.

Second, AI will become embedded in how we operate, giving skilled operators greater visibility and insight, from live control towers for vehicle yards to sensors that spot failing equipment early. The operators who get their data in order first will move fastest.

Third, the skills the sector needs are changing fast. AI, automation, electrification, mechatronics, hydrogen and cyber security are reshaping roles from the quayside to the control room, so this is as much about helping the existing workforce adapt as bringing new people in.

Underneath it all, resilience is built by people as much as by systems, and that's exactly where a freeport can make a difference. ■



From workforce to capability

Building the skills that drive logistics growth

Tuesday 22 September 2026 • Bank Restaurant Bar and Grill • Birmingham

BUSINESS leaders and HR professionals convened at Bank Restaurant Bar and Grill in Birmingham on 22 September 2026 to discuss the nature of the logistics sector's workforce challenge, during an in-depth dinner discussion sponsored by LMP Legal.

Phil Roe, President of Logistics UK, introduced the discussion by remarking that skills is an ever-present issue in the sector and remains one of the trade body's top three policy areas.

"We're hearing much more about skills from members," he said. "As technology advances, the challenge is ensuring the workforce has the capabilities to keep pace."

This applies not just to people currently joining the industry, but for the lifelong learning of those who have already

enjoyed long careers in the sector.

"How do we make sure that everybody within the organisation stays right at the top of their game by investing in training as we go forward?" he asked.

Lifelong skills is one area where much common ground exists between different logistics businesses.

"It's one of those subjects where we can all gain by collaborating, because no organisation is big enough on its own to solve this problem," Roe maintained.

He said the discussion would focus on workforce capability, labour market change, the Generation Logistics campaign, and how the sector can attract new entrants, including NEETs (young people not in education, employment or training), through apprenticeships and other routes.

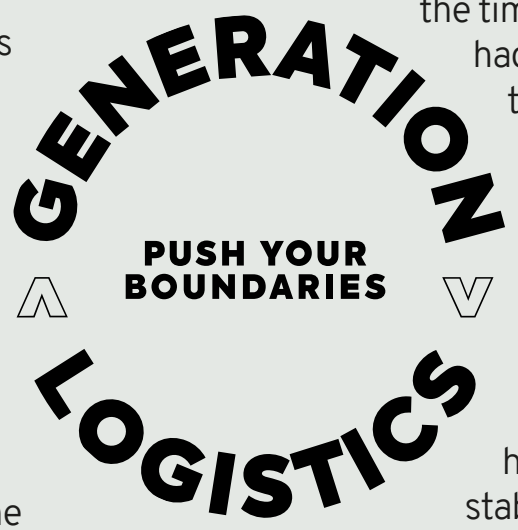
Roe then introduced his colleague and long-term collaborator on Generation Logistics Bethany Windsor, Head of Skills Policy at Logistics UK.

WORKFORCE CAPABILITY

Windsor echoed Roe's introductory point that the sector is now looking at workforce capability, rather than a labour shortage per se.

On the acute shortage of HGV drivers that occurred during the COVID-19 pandemic, Windsor said: "I don't think we've ever seen a shortage like it. The one positive was the attention it brought to the sector."

With logistics workers being acknowledged as key workers, the sector was publicly recognised at the time, as the pandemic had exposed how reliant the economy was on the sector and what happens when capacity is constrained. Since then, employers, government and training providers have worked together to stabilise the labour market.



"That immediate crisis has largely passed," she said. "The challenge now is more structural. It's not just about having enough people, but having the right skills in the right roles at the right time."

The sector is facing a growing capability gap between what employers increasingly need and what the workforce is currently able to provide. Given that logistics is central to the wider economy, this could have much wider implications.

"When logistics experiences capacity or capability constraints, the impact reaches far beyond logistics itself," Windsor said.

Major disruptions are rare, but when they happen the consequences can be significant. While workforce numbers remain important, the bigger challenge is increasingly one of capability: ensuring people have the right skills to perform evolving roles in a changing sector."

THE ADVENT OF AUTOMATION

Logistics operating models are rapidly becoming more automated, digitalised and compliance intensive.

"The world of work is changing faster than at any point in my career," Windsor said. "This doesn't mean that technology is removing the need for people, but it is changing what people need to know. And that's where that capability challenge becomes so important," she said.

LEADERSHIP CAPACITY CHALLENGE

According to research that Logistics UK launched in June, the most significant skills pressures are not necessarily found in those traditional roles.

"The greatest pressures are in specialist, technological and managerial roles," Windsor said. "Leadership and management capability is particularly important. Thinking of those not in education, employment or training, if businesses don't have managers equipped to support and develop new entrants, they're far less likely to bring them in."

"Technology is not removing the need for people, but it is changing what people need to know."

She argued that progression opportunities are also essential for attracting people from the NEET population, making strong leadership and management capability increasingly important across the sector.

"We're a sector that often promotes people based on their operational experience rather than their leadership skills," Windsor said. "There's nothing wrong with that, provided we invest in developing those skills. Given the reality of one to three per cent margins and round-the-clock operations, it needs to be a strategic priority."

FEEDING THE TALENT PIPELINE

While young people can be challenging to recruit and manage, they also represent a huge opportunity. Through the Generation Logistics campaign, about to launch its fifth year, the sector can inspire young people to choose logistics as a career path.

"Young people and their educators don't know what opportunities are out



there," she said. "What we need to think about is the holy trinity of attraction, recruitment and retention. Attracting people is only part of the answer."

Showing the potential for progression is key. One of the clearest findings from Logistics UK's research is that productivity and capability depend not simply on entry, but on movement. How do warehouse operatives become supervisors? How do supervisors become managers?

"Those questions are what increasingly defines workforce success," Windsor said. "Capability can't necessarily be built at the point of recruitment. Too many job adverts ask for three to five years' logistics experience when they don't need to. We need to focus on the skills people have and the potential they bring."

NURTURING IN-HOUSE TALENT

While entry to the sector is one side of the equation, the other is the development and upskilling of the existing workforce, where much of the improvement will need to come from.

"The fundamental labour market reality is most of the workforce of the future is the workforce of today," she said. "If businesses are to become more productive over the next decade, that improvement will have to come largely from developing the employees they already have."

That is a challenge at any time, but particularly in the current economic and operating environment. Windsor believes that the sector should look to government to create a skills system capable of supporting continuous

adaptation. One of the primary asks is for shorter, modular interventions, targeted management development, and rapid upskilling opportunities alongside traditional apprenticeships and other, longer-term qualifications.

"There is room for everything, but we have to find a way of unlocking that in a way that makes sense for businesses of all sizes, particularly our SMEs for whom the complex skills landscape and the complex funding landscape can be particularly challenging," she said.

THREE SKILLS PRIORITIES

The focus should be more on alignment rather than funding alone, Windsor argued. Government should be aware of the fact that while some schemes are working well, more are not. For business leaders, she suggested three key skills priorities.

The first is to treat workforce capability as a strategic issue. Skills can no longer sit solely within HR, because capability increasingly determines productivity, innovation, resilience and return on investment.

"It is the bottom-line enabler," Windsor claimed, "So capability is a board-level issue. I hope that's something we can agree on."

The second is to invest in progression, not just recruitment. The organisations that succeed will be those that are able to retain, develop and advance their people.

"Workforce development has got to be viewed as a growth strategy, not simply training," she said.

Thirdly, broaden access to talent. This means engaging young people, supporting those currently outside employment, improving diversity and creating clearer pathways into and through logistics careers.

"We know that the future workforce is unlikely to come from the same talent pools as they have in the past," Windsor maintained. "So we need to work collaboratively to find what might work for your future talent pool."

Concluding the discussion, Windsor argued that the debate had shifted from workforce numbers to workforce capability, and whether businesses have the skills needed to operate and grow in an increasingly complex economy.

"Future success, I believe, will depend less on workforce volume and more on capability. We know that we can respond when shortages become visible and immediate," she said. "We all responded with aplomb during those COVID years. But the challenge now is to build something more sustainable: a workforce that's adaptable, productive and equipped for the future, whatever that future might look like. If we get that right, logistics will not only support economic growth, it will help drive it." ■

Find out more



Executive dinner: Global trade

Tuesday 6 October 2026 • Noels Restaurant and Bar • Birmingham

GLOBAL trade was on the menu on 6 October 2026 as logistics leaders gathered at Noels Restaurant and Bar in Birmingham for an in-depth dinner discussion.

Chairing and hosting the discussion was Jemma James, Director of Partnerships and Digital Services at Logistics UK, who explained that global trade has expanded significantly from just over a third (36%) of global GDP in 1979 to almost two-thirds (60%) by 2019.

"You won't be surprised to hear that this captures the meteoric rise of China," she said, "which in the late 70s sat on the periphery of global trade, but is today the world's export powerhouse."

Meanwhile, the world's second largest trading nation, the US, has been making giant waves with its controversial tariff policy, which is reshaping the UK logistics sector with fluctuating demand patterns, new

trade routes, and evolving freight movements across ports, airports and road freight.

"While these shifts present significant challenges, they're also creating opportunities for growth and innovation, placing renewed emphasis on cost management, capacity planning, and also operational resilience and the ability to change at short notice," James said.

SETTING THE SCENE – THE ECONOMIC CONTEXT

James introduced Maddi Solloway-Price, Interim Deputy Director of Policy, Logistics UK, to share an overview on the topic of global trade. Solloway-Price began by setting out the wider economic backdrop against which the logistics sector operates.

"While there are reasons for optimism," she said, "it would be impossible to have a meaningful discussion tonight without acknowledging the significant challenges that businesses continue to face."

UK GDP grew by 0.5% in the second quarter of 2026, following growth of 0.6% in the first quarter. So, while the economy continued to expand, the pace of that growth has eased. Looking specifically at transportation and storage, however, the picture was less encouraging, with the sector making no contribution to GDP growth in Q2.

"In simple terms, our industry continues to underpin economic activity, but it is not currently accelerating growth. One of the principal reasons for that is the sustained pressure from rising operating costs," Solloway-Price explained.

While HM Treasury's forecast for GDP growth of 1.1% in 2026 remains, representing steady, albeit modest, progress, there are a number of economic headwinds which may knock this off course, most notably the extreme volatility of energy prices. This has made planning and forecasting extremely difficult for logistics businesses.

The International Energy Agency has described the disruption arising from the conflict in the Middle East as the largest oil supply disruption on record.

"For those of us involved in trade and logistics, the restrictions affecting the Strait of Hormuz are especially significant," she said. "It remains one of the world's most important transit routes for both oil and liquefied natural gas, so the disruption there has had immediate implications for energy prices, shipping costs and supply chain resilience."

Prices did ease temporarily as emergency stock releases came onto the market, but when hopes of a ceasefire faded, they shot up again. The increases have been significant, with wholesale diesel peaking at around

> **"The future UK-EU trading relationship is firmly back on the agenda."**

55% above its level at the start of the year, jet fuel increasing by 140% and maritime fuel doubling from its pre-conflict average.

Nor has road transport been spared, with Logistics UK estimating that filling a large HGV from empty now costs close to £1,000.

"Everyone in this room knows why that matters. Many operators are working on margins of just two to three per cent," Solloway-Price said. "Understanding that context is important because it demonstrates exactly why strong representation, practical support and effective policy engagement matter so much at the moment."

On the UK's relationship with the EU, she said it would be remiss not to mention the discussion that emerged from this year's Labour Party Conference, when the Prime Minister used his leader's speech to argue that Brexit has "done more harm than good."

"This is an important political shift," Solloway-Price argued, "because it reopens a conversation that many assumed had been settled for a generation."

From a trade and logistics perspective, any move towards deeper economic integration with the EU could have practical implications, including reducing the frictions businesses face at the border, such as customs complexities, SPS requirements and restrictions on the movement of people and services.

"Whatever views individuals may hold on the wider political debate," she concluded, "the fact that these options are now being discussed at the highest level of government means that the future UK-EU trading relationship is firmly back on the agenda, and it's a discussion our industry will need to engage with closely."

TRADE AS A LEVER FOR ECONOMIC GROWTH

Solloway-Price then handed over to her colleague Josh Fenton, Senior Policy Manager – Trade, Customs and Borders, to dive into some more of the detail surrounding global trade.

On growth, Fenton said the argument is a simple one: the UK grows when it trades.

"Our analysis shows that the UK's trade performance could ultimately be worth an extra £12 billion if you get the logistics right. And £12 billion in today's economy is not just a material change, it's a really significant one," he said.

Over the summer, Logistics UK's new Chief Executive Ben Fletcher has been amplifying this message through national media appearances and conversations with key policymakers and decisionmakers. He has already achieved some success, not least by the appointment of a dedicated logistics minister, which is something the trade body had long been calling for.

"Having a supply chain minister means that that's the first port of call if something goes wrong and it's his job then to have to cascade our message across his cabinet colleagues. So that's really encouraging," Fenton said.

TRUMP, TRADE AND TARIFFS

However, the UK's trade performance still has much ground to recover. Since returning to office for his second term, President Trump has pursued a more protectionist trade policy, introducing a baseline 10% tariff on most imports and higher sector-specific tariffs on products such as steel, aluminium and vehicles.

"We actually have a good deal on that front, but it's still not what we had three years ago," Fenton said. "And from my engagement with members, it does mean that they're looking at alternative markets because the steady supply chain that they had going across the Atlantic isn't there anymore."

This is not just a UK problem, it is a global problem. Supply chains in the



Josh Fenton

UK have a lot of European involvement and from his work in Northern Ireland, Fenton understands that there are many challenges to understand in terms of where a component actually originates from and which tariff is actually applicable.

Trump's tariffs are also exerting a distorting effect on China-EU trade. As the US raises barriers to Chinese imports, there is growing concern that excess Chinese production, particularly in sectors such as steel, could be diverted into European markets which could have the effect of undercutting domestic production in those countries.

MADE IN EUROPE

This is one of the drivers behind the EU's emerging 'Made in Europe' agenda, which seeks to strengthen European industrial capacity and reduce reliance on overseas supply chains. The UK is rightly seeking a place within that framework, recognising

"Trade-led growth is not going away, it's only going to become more important. The services of logistics are going to be really important for that growth. "

that many manufacturing and logistics supply chains operate seamlessly across the UK and EU.

For logistics businesses, these developments highlight a broader reality: global trade is becoming less predictable, more politically driven, and increasingly shaped by industrial strategy.

Against this backdrop, the UK government has sought to strengthen the country's trading position through a series of new Free Trade Agreements with some of the world's fastest-growing economies.

"It doesn't matter what metric you look at, they are not going to replace the relationship that we have with the European Union, which is why previous decisions are being looked at again, because the growth that we so desperately need is linked to exports and there's not really much you can do if something's the other end of the world, it's going to be quite difficult to trade with them," Fenton argued.

TRADE-LED GROWTH CAMPAIGN

In June, Ben Fletcher travelled to Brussels to launch Logistics UK's Trade-Led Growth campaign directly with European stakeholders, to start building support for practical improvements to UK-EU trade.

"We don't want it to be a one-off visit," he said. "We want it to be the start of an ongoing dialogue because we expect that these early conversations might prove fruitful for what's to come. And we do think from the conversations that we have with government that this is the direction of travel that they're going to be considering."

On a practical level, negotiations on the SPS, which is a sanitary and phytosanitary agreement largely governing food and plant products, are expected to conclude this year.

"This would remove a lot of the checks and the health certificates and the cost associated with moving food between the European continent and the UK, which we're massively in favour of," Fenton said. "The amount of goods that go to waste and the cost that's added by things being stuck at border control posts and at the Short Straits, is adding to the cost of food inflation."

Logistics UK is also campaigning to have unnecessary duplication – which also adds cost – removed: "Why is it something that has to be checked in

Executive dinner: Global trade



Europe is then sent to us with the same standard, but has to be rechecked at the expense of yourselves? That's not helpful to your bottom line and it's not helpful to the country."

Fenton's final point was Logistics UK's focus on customs, including removing the duplication of data which has to be submitted to the UK government and the lack of interoperability between the UK and EU systems.

"We really want to see that being a future focus with EU-UK summit dialogue. There's something called the single trade window, which essentially would be one place where you're inputting your data before it goes across borders. So, if it goes to Defra, if it goes to HMRC, if it goes to any other government agency, the data wouldn't have to be inputted six times like it is today. And that cost is significant."

If something goes wrong with one aspect of the customs system and it cannot immediately be diagnosed, goods are held. A single trade window, he argued, could help flag the risk earlier and therefore fix the problem earlier, meaning goods would not need to be held as long.

In summary, Fenton said that trade continued to be an important lever for economic growth: "Trade-led growth is not going away, it's only going to become more important. The services of logistics are going to be really important for that growth. Fortunately, that means that we're going to be more important than maybe we have ever been before."

Find out more



POLICY WIN

Fuel Duty freeze extended

FUEL Duty has been frozen for a further six months, until 1 July 2027, when the previously announced 12-month holiday from vehicle excise duty (VED) for most HGVs is also due to end. The 3.7p cut to duty on red diesel has also been extended for a further six months to 1 July 2027, supporting rail freight.

Together with the measures on fuel and HGV VED announced earlier this year, these decisions will save logistics businesses around £470 million.

These measures will help keep trade moving, support economic growth and avoid adding further inflationary pressures across supply chains. We welcome the Chancellor's decision to listen to the case made by Logistics UK and the wider industry at a time of continuing global uncertainty and rising operational costs.

Find out more



Exclusive events

and networking opportunities

AS an Executive Member, you have complimentary access to a number of our flagship events and conferences, including AI and Automation in Logistics, Delivering Decarbonisation, Digital Transformation in Logistics and Logistics Finance Forum, as well as our celebratory black-tie Logistics Awards event.

You can also benefit from access to a variety of exclusive networking opportunities with your industry counterparts at frequent roundtables, advisory boards, drinks receptions, breakfasts and dinners. ■

Upcoming events

17 NOVEMBER | CONFERENCE

Delivering Decarbonisation 2026

Bringing together leaders across logistics, transport, energy and infrastructure to accelerate the UK's journey to net zero.

Register now

25 NOVEMBER | DINNER

Cyber Security in Logistics and Supply Chains

Exclusive dinner with a senior NCSC representative, exploring cyber threats, supply chain risks and practical strategies to enhance resilience.

Register now

10 DECEMBER | AWARDS

Logistics Awards 2026

Celebrate the best of the logistics industry at Logistics UK's 10th Annual Awards Reception and Gala Dinner.

Register now



27 JANUARY | LUNCH

Navigating the AI Shift

Join an interactive discussion on AI adoption, exploring governance, intellectual property, organisational visibility and responsible innovation in practice.

Register now

23 FEBRUARY | DINNER

What's Next for Logistics M&A? Exploring the Opportunities and Challenges of 2027

Exclusive dinner exploring the 2027 logistics outlook, with insights into M&A trends, market sentiment and strategic priorities.

Register now

10 MARCH | LUNCH

The Talent Logistics Is Missing – Understanding and Attracting the Next Generation

Join Holly Hobbs, Co-Founder of urfuture, to explore new research and practical strategies for attracting, engaging and retaining the next generation of logistics talent.

Register now



Logistics Awards
Recognising leadership and excellence in logistics
2026
LOGISTICS UK

Logistics Awards 2026

Book your place at logistics.org.uk/event/logistics-awards

They're back and better than ever, Logistics UK's prestigious Logistics Awards return for 2026! Now in their 10th year and well established as the go-to event for the industry, don't miss this opportunity to be part of our milestone year by booking your place at the 10th anniversary awards ceremony.

Taking place on Thursday 10 December at Park Plaza Westminster Bridge, London, the awards will celebrate those who have made a significant contribution to the industry.

Hosted by the hilarious Josh Widdicombe and featuring an exciting entertainment programme throughout, you can expect a night of conversation, networking and laughs.

As the leading event by the industry, for the industry, it really is an evening not to be missed!

Don't miss out! Book your table now to make sure you secure your place at this sell-out event at **www.logistics.org.uk/event/logistics-awards**

Thursday 10 December 2026 – Park Plaza Westminster Bridge, London, SE1 7UT

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