

INVEST KENT

Powering productive growth
at the UK's global gateway

CONTENTS

Introduction			
Key Growth Sectors			
Life Sciences and MedTech	5		
Advanced manufacturing and engineering	6		
Agri-food and Agri-tech	7		
Clean energy industries	8		
Creative, Digital and Tech	9		
Ports, Transport and Logistics	10		
Construction	11		
Key Assets			
Unmatched Connectivity and Market Access	12		
Talent Pipeline and Skills Base	13		
Quality of Life	14		
North Kent Corridor and the Lower Thames Crossing (LTC)	16		
Place-Based Investment: Building Growth Through Strategic Sub-Regions and Clusters	17		
Thames Estuary: Medway, Dartford and Ebbsfleet	18		
Coastal Regeneration: Dover and Folkestone	19		
Ports, Logistics and Offshore Energy Clusters	20		
Aviation and Rail	21		
Investment Propositions			
Ashford International Station Investment Area (AISIA)	23		
The North Kent Gateway	25		
Lower Thames Crossing	27		
Manston Airport	30		
Contact us			32

Introduction

As the country’s primary gateway to continental Europe, Kent & Medway anchors the UK’s most critical trade route – linking global markets through the Channel to London onward to the high-growth Innovation Corridor.

With an economy generating £55bn* in GVA each year Kent and Medway is one of the largest and most strategically important economies in the South East.

Internationally recognised as ‘the Garden of England’, Kent and Medway’s ambition is to drive growth that is productive, innovation-led and sustainable.

Home to a skilled and expanding workforce, Kent and Medway offers investors a large, diverse and investment-ready economy at the centre of UK-Europe trade flows. Its strengths lie in globally connected supply chains, export intensity and emerging leadership in high-value sectors driven by innovation and productivity.

With a strong pipeline of investable opportunities, significant place-based infrastructure investment and a clear focus on high-growth sectors, Kent and Medway is ready to accelerate a new phase of UK growth – growth that strengthens national competitiveness, drives exports and builds long-term economic resilience.

*Updated with most recent figures for Kent and Medway (<https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/nominalregionalgrossvalueaddedbalancedperheadandincomecomponents>).

Kent and Medway is where the UK connects to the world.



KEY GROWTH SECTORS

Kent and Medway are powering some of the South East's most productive industries and playing a leading role in several of the UK's fastest-growing sectors.

The region is a recognised leader in globally critical industries such as clean energy, Agri-tech, life sciences and advanced manufacturing, while its strategic location at the heart of UK-Europe trade has built deep strengths in transport, construction, logistics and international trade.

Alongside these foundations, a vibrant cultural and creative ecosystem is driving growth in creative, digital and technology sectors – reinforcing Kent and Medway's reputation as a place where innovation, industry and global connectivity come together.

Life Sciences and MedTech

The region's life sciences sector has played a major role in pharmaceutical R&D for decades with some of the most famous medicines in existence discovered here.

Leading businesses continue to choose Kent and Medway as a home where they can innovate and discover for tomorrow's world, including Pfizer, Viatris, Diasorin, Jazz Pharmaceuticals, Smiths Medical and over 2,170 other life science sector companies: from bio-tech, pharmaceuticals and diagnostics to global science logistics, med-tech manufacturers and contract research organisations.

The sector has **grown by 23.5%** over the last five years and includes over 2,000 life science companies spanning biotechnology, pharmaceuticals, diagnostics, contract research and global science logistics.

Discovery Park, a 220-acre science and technology campus and designated Life Science Opportunity Zone, anchors the ecosystem alongside Kent Science Park and Maidstone Innovation Centre.

Kent and Medway is one of the South East's most significant life science ecosystems, supporting over 63,000 jobs across biotech, pharmaceuticals, diagnostics and med-tech.



Advanced manufacturing and engineering

Kent and Medway is a key part to the UK's manufacturing success, generating an estimated £3.2bn GVA a year.

Strengths include defence, aerospace, engineering, precision manufacturing and industrial technologies.

More than 3,000 manufacturing companies are based in the region, employing over 38,500 people. They include some of the largest UK manufacturing companies, for example, Coty, a specialist in skincare, cosmetics and fragrances as well as international brands such as Rolex, alongside global defence, security and aerospace leaders including BAE Systems and QinetiQ.



AGRI-FOOD AND AGRI-TECH

Known as the 'Garden of England', the region is a major UK hub for Agri-food and Agri-tech, driven by the Growing Kent & Medway initiative.

It focuses on sustainable, high-value crop production, including horticulture and viticulture, and is rapidly developing as a centre for Agri-tech, automation and precision farming to enhance agricultural productivity.

The sector includes more than 2,400 enterprises employing more than 18,000 people and plays a significant part in Kent's food and drink industry, which contributes £2.6 billion to the UK economy.

Key aspects of the sector in Kent include:

- + **GreenTech Hub for Advanced Horticulture:** Based at NIAB horticultural research and development center in East Malling, the GreenTech Hub helps develop sustainable crop production systems, reduce waste and use resources such as water, nutrients and light more efficiently.
- + **Biotechnology Hub:** Located at the University of Kent, it specialises in identifying and controlling crop diseases, optimising plant growth conditions, and creating new sources of protein for food products.

+ **Medway Food Innovation Centre:** The new centre at the University of Greenwich (Medway Campus) is a leader in prototyping new products; and testing food flavour, quality and safety. It is one of the UK's leading specialists in alternative proteins.

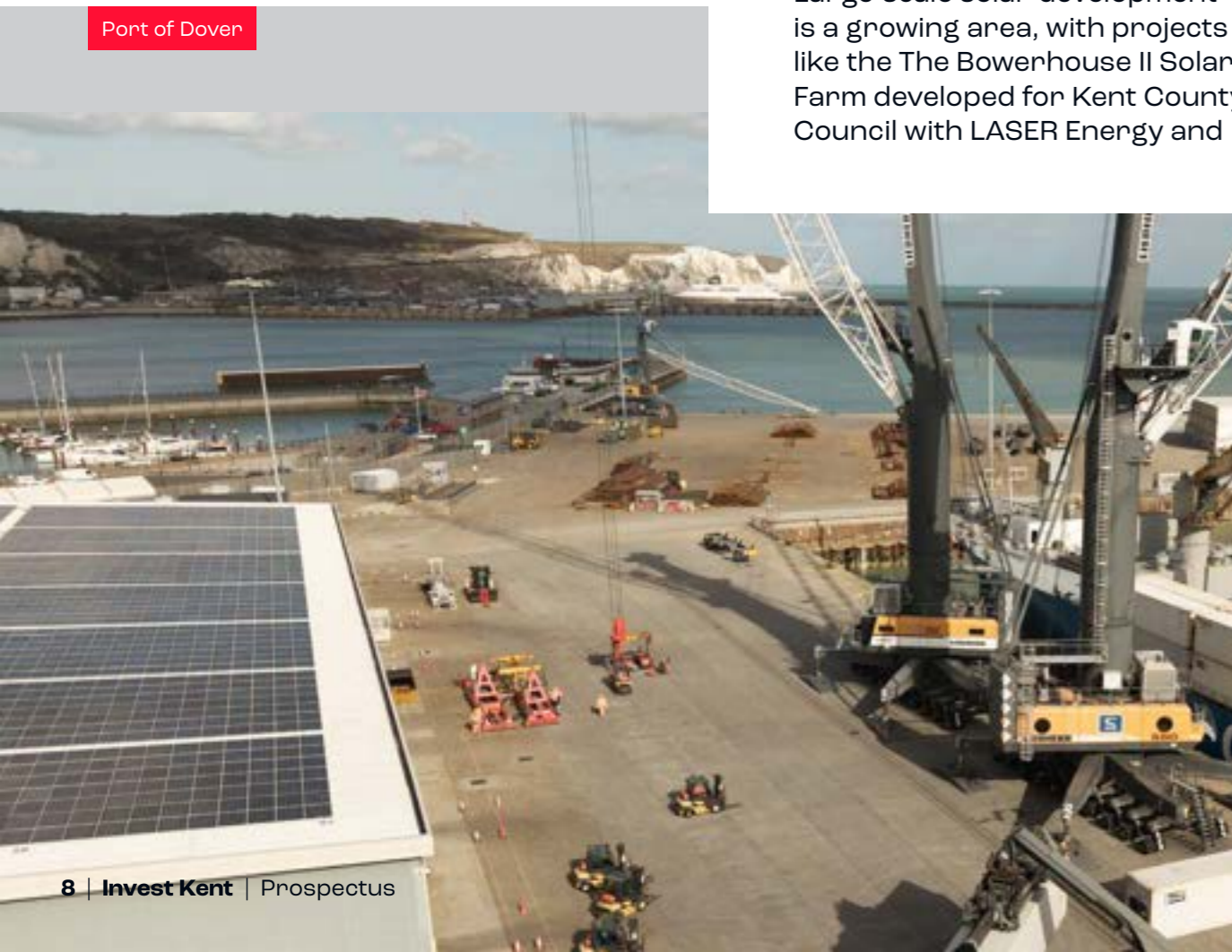
+ **Industrial Agri-Engineering Hub:** Specialists in alternative fuels, robotics and mechatronics, advanced manufacturing and automation. The Industrial Agri-Engineering Hub at Canterbury Christ Church University helps provide real-world solutions to real-world problems.

Kent is the UK's leading wine-growing region due to its climate and chalky limestone soil identical to the French Champagne region which has transformed it into a premier sparkling wine producer. It is home to several of England's best producers and wineries including Chapel Down, Balfour Winery, Gusbourne, Simpsons, Squerryes and Biddenden.



CLEAN ENERGY INDUSTRIES

Port of Dover



Key aspects of the sector include:

- + **Offshore and Onshore Wind:** The London Array, located 20km off the Kent coast, is one of the world's largest offshore wind farms while the Thanet and Kentish Flats provide significant additional wind power.
- + **Solar Energy and Microgeneration:** Large-scale solar development is a growing area, with projects like the The Bowerhouse II Solar Farm developed for Kent County Council with LASER Energy and

Solar Together, a group purchasing scheme that has enabled solar PV and battery storage installations for over 1,000 homes.

- + **Low Carbon Engineering and Technology:** Key players in the region include Kent Intrlol (KKI) which supplies high-quality valves for green energy, including hydrogen, carbon capture and offshore wind. Kent PLC provides global engineering expertise in decarbonisation and hydrogen production.

Kent is a significant hub for clean energy in the South East of England, with an expanding sector which employs approximately 19,600 people in low-carbon technology-related industries.

CREATIVE, DIGITAL AND TECH

Kent and Medway is rapidly emerging as one of the UK's leading creative hubs, with a creative, digital and technology sector that has grown by up to 150% in just five years.

The region has developed particular strengths in digital media, cyber security, telecommunications, film and television production, and gaming.

An expanding ecosystem of digital start-ups, film and TV studios, creative producers, games developers and entertainment companies now operates across the county – from global brands to fast-growing SMEs. Nearly 7,000 creative and digital businesses are based here, including leading simulation entertainment software developer Dovetail Games and Maidstone TV Studios, one of the UK's largest independent high-definition television broadcasting facilities.

This growth is supported by a network of distinctive creative locations where businesses can scale and collaborate. These include Folkestone Creative Quarter, Maidstone TV Studios, Newtown Works in Ashford – previously planned creative hub by Quinn Estates and ABC, and The Historic Dockyard Chatham. Alongside these hubs, towns such as Margate, Folkestone, Canterbury and Tunbridge Wells have developed thriving creative communities, attracting talent drawn by Kent's high quality of life and strong cultural identity.

More than 10,600 people now work in the creative industries across Kent and Medway, supported by a strong talent pipeline from the region's four universities, including the University for the Creative Arts (UCA) – one of the UK's leading specialist creative institutions.

More than 10,600 people now work in the creative industries across Kent and Medway.



PORTS, TRANSPORT AND LOGISTICS

Kent and Medway sits at the heart of the UK's most important international trade corridor, making ports, transport and logistics one of the region's most significant and fastest-growing sectors.

This strategic connectivity underpins a powerful logistics and distribution cluster along the M2 and M20 corridors, where a network of warehousing, freight forwarding, and supply chain operations serve London, the South East and international markets. A healthy transportation and storage cluster of more than 3,000 companies work across air, freight, land and sea, while recent investment in regional distribution centres, cold storage facilities, and general warehousing makes Kent a cost-effective contender for the sector.

Warehousing and transport support activities have grown by 38% since 2018, supporting almost 20,000 jobs and significantly outperforming national growth rates, thanks to recent investment, including by Panattoni. This momentum is expected to continue as businesses seek resilient, well connected locations capable

of supporting increasingly complex global supply chains.

Major infrastructure investment is further strengthening Kent and Medway's position as a logistics powerhouse. Projects such as the Lower Thames Crossing will transform connectivity between Kent, Essex and the wider UK motorway network, unlocking capacity, reducing congestion and improving reliability for freight movement.

Alongside physical infrastructure, the sector is evolving rapidly through innovation and technology. Businesses across the region are adopting automation, robotics and advanced data analytics to improve efficiency, optimise supply chains and increase productivity. At the same time, the industry is investing in sustainable logistics solutions, including low-carbon transport systems and greener distribution networks.

Port of Dover



CONSTRUCTION

Kent and Medway's construction sector is a major engine of regional growth, supporting the delivery of new homes, commercial developments and strategic infrastructure across one of the UK's fastest-growing areas.

The region hosts more than 12,500 construction businesses, employing over 58,000 people, and the sector continues to expand as demand for housing, regeneration and commercial space accelerates. Construction represents the largest proportion of businesses in Kent, accounting for around 18.4% of all enterprises – significantly higher than the 14.1% national average.

This strength reflects Kent and Medway's position as a key location for growth in the South East. A strong pipeline of residential and mixed-use development is helping to meet the needs of a growing population, while large-scale

regeneration projects are transforming town centres, waterfronts and strategic employment sites across the region.

The sector is supported by a diverse ecosystem of contractors, engineering specialists and property developers. Major firms such as Baxall Construction, Kent Structures and Libra Construction operate alongside a large network of SMEs delivering projects across residential, commercial and infrastructure markets. Increasingly, businesses are also leading the transition toward sustainable and low-carbon construction, adopting modern methods of construction, energy-efficient

building design and innovative materials.

Collaboration between industry and the public sector is helping to drive this growth. The Kent Housing and Development Group (KHDG) brings together landowners, developers and construction firms to work closely with public partners including Kent County Council, Homes England, and the Environment Agency. This partnership approach supports the delivery of strategic housing and employment sites while ensuring development is aligned with infrastructure, environmental sustainability and long-term economic priorities.

Together, these strengths position Kent and Medway's construction sector as a critical enabler of regional growth – delivering the homes, workplaces and infrastructure needed to support investment, productivity and sustainable development across the South East.

Construction represents the largest proportion of businesses in Kent, accounting for around 18.4% of all enterprises.



KEY ASSETS

Unmatched Connectivity and Market Access

As the country's primary gateway to continental Europe and positioned between London and the globally renowned Golden Triangle of London–Oxford–Cambridge, Kent and Medway is the only UK location with direct road, rail and ferry access to mainland Europe.

The Port of Dover processes approximately 2.6 million trucks, 2.8 million cars and 16 million passengers annually, supporting over £119 billion in trade.

The Dartford Crossing handles around 180,000 vehicles per day, 42% of which carry freight. London is accessible in as little as 17 minutes via high-speed rail, and five international airports are within a one hour travel time.

Superfast broadband reaches 96.9% of properties, with 62% gigabit-capable, supporting digital and knowledge-led industries.

Port of Dover



Talent Pipeline and Skills Base

Kent and Medway offers businesses access to a large, skilled and growing workforce, supported by a strong network of universities and industry-focused research institutions.

The region's working-age population is forecast to grow by around 15% by 2039, strengthening the talent pool available to employers across high-growth sectors. Four universities – Canterbury Christ Church University, the University of Kent, the University of Greenwich (Medway campus) and the University for the Creative Arts (UCA) – produce a steady pipeline of graduates in key disciplines including engineering, biosciences, digital technology, creative industries and advanced manufacturing.

This talent base is closely aligned with the region's economic strengths. Life sciences employment has grown by 23.5% in the past five years, with the sector now supporting

around 61,000 jobs, while creative industry employment has expanded rapidly as Kent and Medway develops into a major creative and digital hub. The sector includes more than 2,400 enterprises employing more than 18,000 people, playing a significant part in Kent's food and drink sector £2.6bn contribution to the UK economy

Businesses benefit from direct collaboration with university research centres specialising in biosciences, cybersecurity, data science, engineering and industrial biotechnology, as well as access to innovation facilities such as Discovery Park, one of the UK's leading science and technology campuses.



QUALITY OF LIFE

Kent and Medway offers an exceptional quality of life and is consistently recognised in international media as among the best places in the UK to live and work. The region provides a unique balance of rural, coastal and urban living, combined with easy access to London and international gateways.

From historic cities and vibrant seaside towns to rolling countryside and picturesque villages, Kent and Medway provide a lifestyle that attracts residents from across the UK and beyond. World-renowned landmarks such as Dover Castle, Canterbury Cathedral, Leeds Castle and the iconic White Cliffs of Dover sit alongside culturally rich destinations including Canterbury, Margate and Folkestone, which host international arts festivals, major music events and vineyard tours.

The natural environment plays a major role in the region's appeal. Over a third of Kent's land is designated as National Landscape, complemented by more than 350 miles of coastline and internationally recognised heritage sites, including UNESCO World Heritage locations. These landscapes offer

exceptional opportunities for outdoor recreation, supporting wellbeing and making the region particularly attractive for families and professionals seeking a balanced lifestyle.

Housing affordability further strengthens Kent and Medway's quality-of-life offer. Property costs are typically up to 33% lower than in London, providing a broad choice of high-quality homes, from contemporary city-centre apartments to spacious family properties. Major developments such as Ebbsfleet Garden City, Otterpool Park and Chilmington Green are creating sustainable, well-connected communities designed for modern living, ensuring the region continues to meet the needs of its growing population.

Kent and Medway's thriving visitor economy attracts around 66 million visitors each year and supports an outstanding food, drink and hospitality sector. Combined with excellent schools, strong communities and a growing cultural scene, the region provides an environment that appeals to families, entrepreneurs and creative professionals alike.

Together, these qualities create a place where people can enjoy a high standard of living while remaining closely connected to major markets and opportunities.

North Kent Corridor and the Lower Thames Crossing (LTC)

One of the most transformative infrastructure projects shaping the region's investment landscape is the Lower Thames Crossing (LTC).

Planned as a new road tunnel beneath the River Thames linking Kent and Essex, the project will create a major new strategic freight route connecting the M2 and A2 in Kent to the M25 in Essex. The LTC will unlock major opportunities along the North Kent Corridor, particularly in Dartford, Gravesham and Medway, where improved connectivity will support:

- + Large-scale logistics and distribution hubs
- + Advanced manufacturing and industrial parks
- + Commercial and residential expansion linked to Ebbsfleet Garden City



River Medway, Kent



Port of Dover



@Ady Kerry

Ashford International

PLACE-BASED INVESTMENT: Building Growth Through Strategic Sub-Regions and Clusters

Kent and Medway offers a series of place-based investment opportunities shaped by strategic geography, major infrastructure, established sector strengths and growth locations across the county.

Positioned between London and mainland Europe, the area combines gateway connectivity with a diverse set of development, industrial and innovation assets.

The region's economic strategy emphasises concentrating investment within key geographic corridors and industry clusters to drive growth in sectors such as advanced manufacturing, life sciences, logistics, Agri-tech and green energy. This approach has supported strong regional performance, with analysis suggesting an investment in Kent generating a 13.8% larger contribution in GVA than a similar magnitude investment elsewhere.

The county's most significant opportunities currently centre on:

- + North Kent Corridor and the Lower Thames Crossing

- + Thames Estuary regeneration in Medway and Dartford
- + Coastal economic renewal in Dover and Folkestone
- + Logistics and maritime clusters linked to Kent's ports
- + Rail-driven growth around Ashford International

For investors, this coordinated approach creates a pipeline of opportunities across real estate, infrastructure, logistics, renewable energy and advanced manufacturing.

With major infrastructure projects, strong transport connectivity and a growing cluster economy, Kent and Medway is increasingly seen as a highly strategic regional investment location.

THAMES ESTUARY: MEDWAY, DARTFORD AND EBBSFLEET

The Thames Estuary represents one of the UK's largest regeneration opportunities, with Medway and Dartford emerging as central investment locations.

Medway is undergoing a multi-site regeneration programme designed to reposition the area as a mixed-use urban and industrial hub.

Key projects include:

- + Rochester Riverside – A major waterfront development expected to deliver 1,400 homes by 2030, alongside retail space, a hotel and a new primary school.
- + Chatham Town Centre regeneration – with the transformation of Mountbatten House into 164 residential units with commercial space, alongside the £15 million Healthy Living Centre.
- + Environmental upgrades such as the Paddock redevelopment, which has increased biodiversity and improved urban green space.

Further west, Dartford and the Ebbsfleet corridor are experiencing rapid expansion through the 125-hectare Ebbsfleet Garden City programme.

Ebbsfleet Central, a 120-acre, mixed-use development, will form the commercial core of the new city, delivering:

- + 2,100 new homes
- + 100,000 sqm office space
- + Retail and leisure facilities
- + High-quality and sustainable residential neighbourhoods

Together, these projects are transforming the Thames Estuary into a major residential, commercial and innovation corridor within commuting distance of London.



Dartford Crossing



Coastal Regeneration: Dover and Folkestone

Kent's coastal towns are a key focus for the county's place-based investment strategy, with regeneration programmes focused on tourism, maritime industries and urban renewal.

In Dover, significant investment is being delivered through port and waterfront redevelopment linked to the Port of Dover 2050 vision, including upgrades to cargo facilities, marina and waterfront areas, and new commercial, leisure and residential development.

In Folkestone, regeneration is being supported through the £22 million "A Brighter Future" programme, alongside wider town centre and cultural investment that has helped establish the town as one of the South East's leading creative coastal locations.

Together, these initiatives are helping to reposition Kent's coastal corridor as an attractive location for residents, visitors, businesses and investment.



Folkestone, Kent

Ports, Logistics and Offshore Energy Clusters

Kent's maritime infrastructure forms a major component of its investment ecosystem, supporting trade, logistics and renewable energy industries.

The Port of Sheerness is seeing a £30 million investment in a new Ro-Ro berth and pontoon, alongside upgraded quay infrastructure.

The Port of Ramsgate has supported offshore wind operations and maintenance activity for projects including the Thanet and Kentish Flats wind farms. The council's Pathfinder Port Infrastructure programme aims to re-open the port to cargo and modernise critical dockside assets, creating clear operational zones and enabling new commercial operations.

Sheerness, Kent



Ashford International



@ Ben Jones

AVIATION AND RAIL

The Ashford International High-Speed Catalyst Project aims to leverage the town's rail infrastructure to stimulate multi-site regeneration centred around Ashford International Station.

The programme combines several development projects, focused on:

- + Commercial office space
- + Residential development
- + Advanced manufacturing clusters
- + Skills and workforce development

The goal is to position Ashford as a super-high-growth regional hub, connecting London, continental Europe and the wider South East.

A further strategic opportunity lies in the proposed redevelopment of Manston Airport in Thanet which RiverOak Strategic Partners has proposed transforming into a dedicated multimodal freight hub for time-critical cargo, including pharmaceuticals, food and perishable goods such as flowers.



INVESTMENT PROPOSITIONS

ASHFORD INTERNATIONAL STATION INVESTMENT AREA (AISIA)

The Ashford International Station Investment Area (AISIA) is a 33-hectare, station-led regeneration zone that serves as the UK's primary gateway to Europe. By aligning transport renewal, housing, and low-carbon infrastructure, AISIA presents a coherent, high-momentum investment proposition. With £169m in capital already committed, this is no longer just a vision—it is a live delivery programme.

The Growth Momentum

Ashford's population has grown by 8% since 2019, double the UK average. This rapid expansion is underpinned by a strategic housing pipeline of 23,000 new homes in the immediate catchment, including:

- + **7,250 homes** at South Ashford Garden Communities
- + **10,000 homes** at Otterpool Park Garden Town (within a 20-minute rail journey)
- + **800 homes** at the Newtown Works site, directly linked to the station

Three Strategic Pillars of Investment

1. Restoring International Connectivity

Ashford is strategically located on the London–Paris corridor and is immediately operationally ready to reclaim its status as a premier European hub.

- + **Capacity:** Two international platforms with space for 900 passengers per train.
- + **Market Potential:** Forecasts suggest 350,000–600,000 passengers in Year One of reinstated services, exceeding 750,000 by 2040.
- + **Economic Impact:** Reinstatement is projected to boost visitor spending by £126m locally, adding over £1bn to the economy over five years.

2. Station-Led Regeneration

AISIA consolidates a cluster of development-ready, largely publicly owned brownfield sites.

+ Value Proposition: The Kent Property Market Report 2025-26 highlights that Kent's prime yields across office space and business parks has risen to 7-8% as well as new build homes in Ashford achieving sales of £332-£450 per SqFt.

+ Key Projects:

+ Kent Wool Growers: A £47m flagship mixed-use site delivering 160 homes (Completion 2029–30).

+ Elwick Place Phase 2: Stanhope Plc with Sunningdale House Developments have received Planning permission to deliver the Elwick Place Phase 2 development which would deliver a residential scheme with 200 flats.

+ Council-Led Sites: 3.7 hectares delivering 500+ homes via a £169m investment programme.

3. Low-Carbon Infrastructure

The AISIA aligns with Ashford's decarbonisation trajectory, anchored by two deliverable low carbon infrastructure projects:

+ District Heat Network (DHN): A multi-phase network delivering 95% low-carbon heat, with a projected social IRR of **15.8–17.4%**.

+ Stour Centre Solar Array: Over 1,500 solar panels providing immediate carbon savings and reduced operational costs.

The Investment Opportunity

AISIA seeks a coordinated package of investment to unlock the wider area, which carries an estimated total development value exceeding **£400m** (including Newtown Works). We are seeking:

+ Institutional Capital: For Build-to-Rent (BtR) and mixed-use residential schemes.

+ Infrastructure Funds: To accelerate the District Heat Network and solar integration.

+ Joint Ventures: To partner with Ashford Borough Council and the Department for Transport (DfT) on station-adjacent commercialisation.

Key partners

Ashford Borough Council, the DfT, London St. Pancras Highspeed, Stanhope Plc and Sunningdale House Developments, A Better Choice for Property Ltd (the council's delivery vehicle), and EKC Group (Ashford College).

With planning permissions in motion and a delivery horizon of **2026–2035**, AISIA represents the South East's most significant opportunity to align international rail connectivity with sustainable urban growth. Ashford is ready to move; we invite you to join the momentum.

The return of international rail services, intensification of station side development, and deployment of low carbon energy systems together provide the foundation for a thriving, sustainable and globally connected Ashford.

THE NORTH KENT GATEWAY: INTERNATIONAL CONNECTIVITY AT SCALE

The North Kent Gateway is the UK's most strategically positioned growth corridor. By linking Ebbsfleet International and Ashford International via High Speed 1 (HS1), this region forms a global connectivity powerhouse. It bridges the gap between London and Europe, serving a catchment of 2.3 million people and a sub-regional economy generating £80bn GVA annually.

This isn't just a commuting hub—it is a productive, internationally connected business ecosystem ready for large-scale capital deployment.

The Flagship: Ebbsfleet Central

The heart of this proposition is Ebbsfleet Central, a 34.86-hectare site owned by the Ebbsfleet Development Corporation (EDC). Positioned around the International Station, it represents the future “urban heart” of the region.

+ Planning Status: Outline Planning Permission secured in March 2026 for a major mixed-use town centre.

+ Residential Delivery: Approximately 2,100 new homes, with a commitment to at least 35% affordable housing.

+ Commercial Capacity: Roughly 87,000m² of prime office space, supported by retail, leisure, and high-quality public realms.

+ Public Support: EDC is investing heavily in essential highways and utilities infrastructure, with a site start scheduled for 2028.

Transformational Infrastructure

The investment case is further de-risked by two massive infrastructure drivers:

- 1. HS1 & International Rail:** Ebbsfleet's parkway configuration and significant spare capacity offer a differentiated gateway to Europe, allowing for high-value, decentralized growth outside Central London.
- 2. The Lower Thames Crossing:** This transformational project addresses the Dartford Crossing bottleneck, creating a resilient new link to Essex. It integrates North Kent into the wider Thames Estuary economy, unlocking new opportunities in advanced manufacturing and logistics.

A Coherent Investment Geography

The Gateway leverages the unique strengths of three key local economies to provide a diverse range of asset classes:

+ Dartford: The “delivery engine,” featuring Ebbsfleet Garden City (c.15,000 homes) and a proven track record of converting infrastructure into high-absorption residential and commercial schemes.

+ Gravesham: Offers riverfront development opportunities and housing scale that broadens market choice.

- + Medway: Provides a massive, skilled workforce and specialized capacity in defence, creative industries, and innovation-led manufacturing.

The Opportunity for Investors

North Kent offers a rare combination of public sector backing and private sector upside. With land ownership aligned and planning hurdles cleared at Ebbsfleet Central, the path from capital deployment to return is significantly shortened.

Over the coming year, the EDC is commencing market engagement to identify private sector partners. We are seeking:

- + **Strategic Developers:** To partner on the delivery of the first phase of Ebbsfleet Central.
- + **Institutional Investors:** For large-scale residential and Build-to-Rent (BtR) opportunities.
- + **Commercial Partners:** To occupy and develop the 87,000m² office pipeline.

Conclusion

The North Kent Gateway is where international connectivity meets proven delivery. With the Lower Thames Crossing expanding the catchment and Ebbsfleet Central now planning-approved, the area offers a de-risked, scalable pipeline for investors looking to capture the next wave of South East growth.



LOWER THAMES CROSSING

The Lower Thames Crossing (LTC) is a nationally significant strategic infrastructure project to deliver a new high-capacity road crossing east of London. It includes a twin-bore tunnel beneath the River Thames and approximately 14 miles (23 km) of new roads connecting the M2/A2 in Kent with the A13/M25 corridors in Essex.

The scheme is intended to relieve Dartford congestion, improve resilience of the national road network, unlock regional growth, and support freight and logistics connections between Kent (including ports/Dover) and London/the Midlands. The scheme has a broad national policy mandate and has secured Development Consent and government approval in 2025.

From an economic perspective, the benefits are transformative. Independent studies suggest the project could deliver up to £200 million annually in productivity gains by cutting congestion, reducing delays, and creating more reliable connections between ports, logistics parks, and inland hubs. The government has forecast that the scheme could generate as many as 22,000 jobs during construction and provide a long-term boost for regional economies that rely heavily on efficient movement of goods.

+ **Indicative capital requirement:** £9–£10billion total project cost (latest public estimates vary; government and industry commentary cites figures in this range). The Treasury and National Highways have considered part private finance options to leverage private capital.

+ **Location:** East of London – twin bores under the Thames between Tilbury/Essex and the Hoo Peninsula/Medway area in Kent, with connecting new roads to the M2/A2 and A13/M25. Serves port, logistics and distribution corridors linking Dover/South East ports to the national motorway network.

+ **Primary Sector:** Strategic transport infrastructure with direct benefits to logistics & distribution, freight, advanced manufacturing, ports, tourism and regional supply chains. Also supports broader construction, professional services and downstream localisation investments.

+ **Asset Ownership:** Asset Ownership: It will be privately owned and operated with National Highways and DfT seeking a private buyer or consortium over the coming months.

Indicative Delivery Timeline:

2026: Early works and enabling works expected to commence (subject to finance and procurement). National Highways' published timelines envisage construction start in 2026 (post-consent).

2026–2032: Main construction phase (detailed design, tunnelling, approaches and connecting roads). Typical construction estimate: 6–7 years from start to full operational readiness, with phased openings for specific link sections possible

North Tunnel Entrance



South Tunnel Entrance

INVESTMENT PROPOSITIONS

+ Opportunities for Investors:

Large-scale construction contracts and supply chain packages (tunnelling, civil engineering, materials supply, plant hire).

Long-term investment in operations/maintenance via potential concession or regulated asset base (RAB) style financing – institutional investors seeking predictable long-term returns.

Green infrastructure and decarbonisation solutions (low-carbon materials, energy systems, biodiversity offsetting, renewables for tunnel systems).

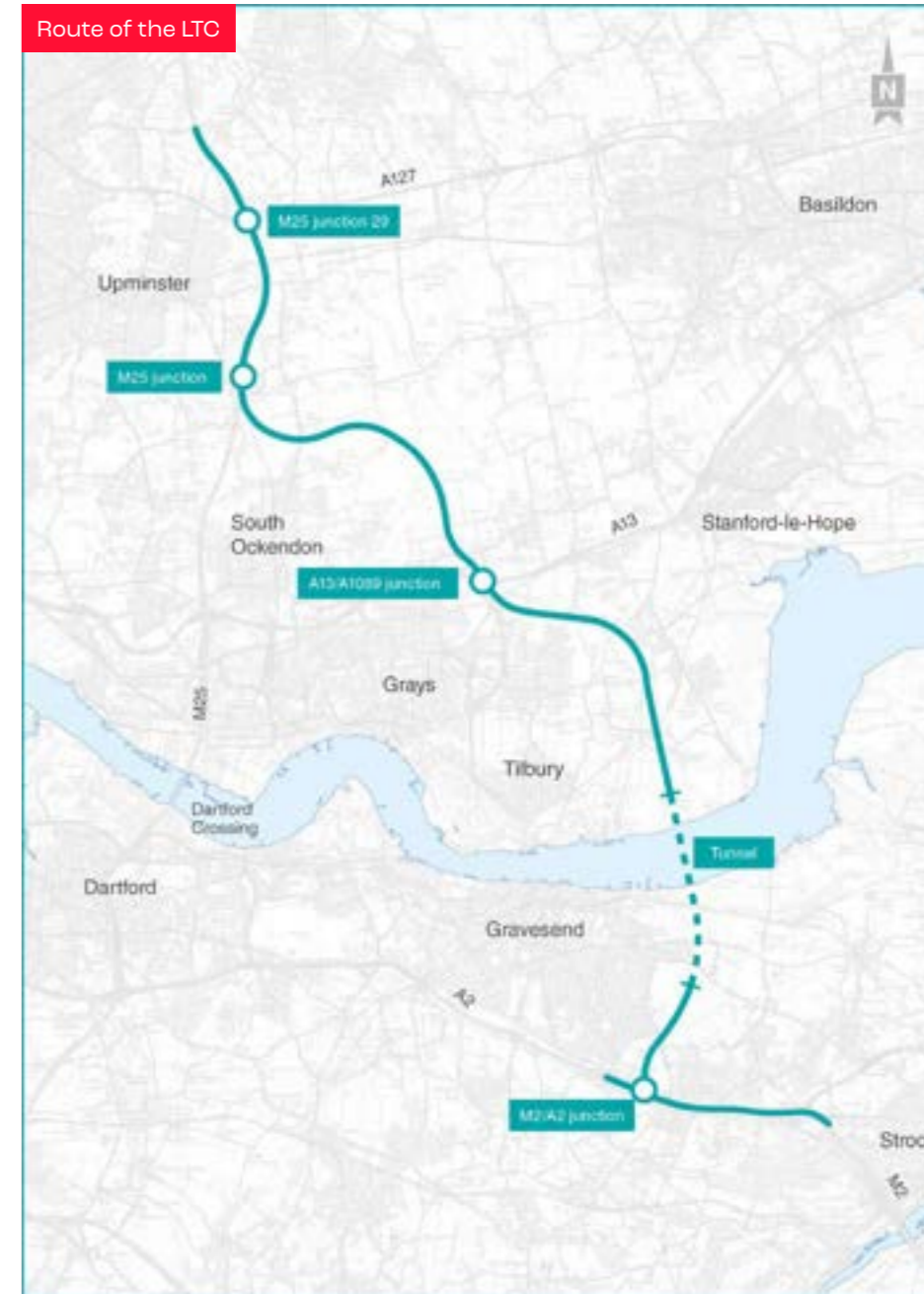
Logistics-linked real estate and last-mile facilities near new junctions – opportunities for commercial and industrial development, logistics parks and warehousing growth.

Status Update of any Regulatory Contingency:

Development Consent: The DCO was granted and ministers approved the project in March 2025; this clears the principal planning hurdle, though legal challenges or judicial review remain potential procedural risks.

Consents & environmental mitigations: Detailed marine, environmental and construction consents will be required and are being progressed as part of the detailed design and consenting package. Early works and enabling consents are part of the 2025–26 programme.

Route of the LTC



MANSTON AIRPORT

RiverOak Strategic Partners have their sights on transforming Manston Airport into the UK's only dedicated multi-modal freight distribution hub for time critical freight including medicines, food and flowers.

The £500 million (US\$ 635 million) proposal, includes 19 stands capable of handling widebody freighters as well as a 705,035 sq ft (65,500 sqm) cargo facility.

To reach its full potential and operate at capacity Manston Airport wishes to align its interests with Manston Investment Kent which owns the adjacent site.

Potentially, 2,500 direct jobs, could be created, which would have a significant impact for East Kent.

The airport site has been designated a nationally significant transport infrastructure asset. The adjacent 180-acre site has a 1 million sq ft allocation in the Local Plan. Thanet District Council has indicated it welcomes a masterplan for 2.5M sq ft commercial logistics space.

Indicative delivery timeline

2026–2027: Planning and design work continues, including environmental surveys and public consultation on proposed flight paths.

2026–2027: Detailed plans will be finalised, allowing RiverOak Strategic Partners (RSP) to begin securing cargo airline and freight forwarding commitments.

2028: Major construction is expected to begin. An estimated £500–£650 million will be invested in infrastructure, including new terminals and runway resurfacing.

Late 2028–2029: Construction is set to be complete, followed by the start of recruitment and operational preparations. The airport will reopen as a dedicated air freight hub by the end of the year.

Business & Environmental Impact

Trade: The airport will help UK trade, import vital goods, and offer an alternative to London's crowded airports. Once fully operational, Manston will be capable of handling over a million tonnes of freight annually, positioning it as a key player in the UK's air cargo network and a major driver of economic growth in Kent.

Job Creation: The airport is expected to create approximately 2,500 direct jobs and 20,000 indirect jobs across East Kent and the wider national economy within its first 20 years of operation.

Carbon Neutrality: RSP is committed to achieving net zero carbon emissions for all airport operations, excluding aircraft emissions, within five years of opening.

Regional Growth: Manston is seen as a vital asset for delivering jobs and investment to Thanet and the wider Kent economy.

Partners and Investors:

RSP plus Manston Investment Kent Ltd

Funding Sources

RSP is the primary developer and investor behind the project. It has committed £500 million to redevelop the airport into a national airfreight and passenger hub. This investment was approved by the UK Department for Transport.

Opportunities for Investors:

The airport site requires (phased) infrastructure investment in the region of £350m to enable freight cargo operations. If this was forthcoming the adjacent land (owned by Manston Investment Kent) would be developed to supply 2.5m sq ft commercial logistics space at a 40% net developable area, enabling both projects to as a whole to deliver in excess of 2,500 direct jobs.

In addition, if Manston was designed Enterprise Zone status, the subsequent temporary rates relief would be the catalyst for transforming the attractiveness of the area to business.

Status Update of any Regulatory Contingency:

+ Development Consent Order

The Government granted the Development Consent Order because plans for Manston Airport are consistent with all relevant Government policies, including the Airport National Policy Statement, The Aviation Policy Framework, General Aviation Strategy and Transport Decarbonisation Plan. The consent also recognises the contribution Manston will make to resilience in the UK's freight transport sector.

DCO consent for:

- + 19 widebody parking stands
- + 4 narrow body passenger stands, 65,000sq m of cargo terminal
- + 100 ha of non-aircraft pavement (247 acres)
- + 57 ha (140 acres) of aircraft pavement
- + 1.1m sq ft of landside development
- + 8 business aviation hangars
- + 3 recycling hangars and aprons



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