

# HEATHROW'S INVESTMENT IMPACT REPORT: POWERING THE UK'S HUB AIRPORT

Heathrow



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As one of the largest private sector investors in the UK, Heathrow's far reaching supply chain offers vital opportunities for our members to contribute to the growth of the airport.

Heathrow's £1.1 billion investment into the operation and its commitment to ensure the UK remains internationally competitive, provides our members with stability and certainty for the future, as well as further opportunities to build their expertise, innovate and expand their network."

**BEN FLETCHER**

Chief Operating Officer, MakeUK



# FOREWORD

## Heathrow is the UK's gateway to the world and, ultimately, the country's gateway to growth.

As the UK's only hub airport, we directly connect to 239 destinations in 89 countries, making Heathrow the world's best-connected airport and a vital infrastructure asset for the UK. Our unparalleled connectivity is a key driver of our success. In 2024, we have seen record-breaking numbers of passengers travelling through our terminals and expect to have served almost 84 million by the end of the year.

To ensure Heathrow is an extraordinary airport, fit for the future, we have invested £1.1 billion in 2024. This not only makes Heathrow one of the UK's largest private sector investors, but also supports national economic growth, makes the UK more internationally competitive and sustains thousands of skilled jobs across our supply chain in every region of the country.

The 1,100 businesses in our supply chain span critical sectors from cutting-edge cybersecurity and digital infrastructure to advanced manufacturing, with 60% of our supply chain being SMEs. These products and services come from every corner of the UK. For example, between December 2023 and December 2024, we spent £158.3m in Yorkshire and the Humber, and £119.5m in the West Midlands.

This report outlines our continuing financial commitment, highlighting the impact of this year's £1.1 billion investment and showcases some of our largest and most complex projects – all of which keep Heathrow running and enhance our airport to support future economic growth.

As Heathrow grows, so does our team. We are proud to be the largest single site employer in the UK, with over 90,000 people now working at the airport. The investment we have made has directly delivered jobs not just for our local communities, but also across the UK through our supply chain.

Looking to the future, we will play our part in helping the Government with its mission to secure the highest sustained growth in the G7 and will ensure our investment continues to reach every part of the country. In 2025/26, Heathrow's capital spend will be the largest private sector capital investment in the UK's transport network.

Every day, I see Heathrow and our people going from strength to strength and I am proud play my part in making every journey better.



**NIGEL MILTON**

Chief Communications and Sustainability Officer

# OUR UK SUPPLY CHAIN STORY



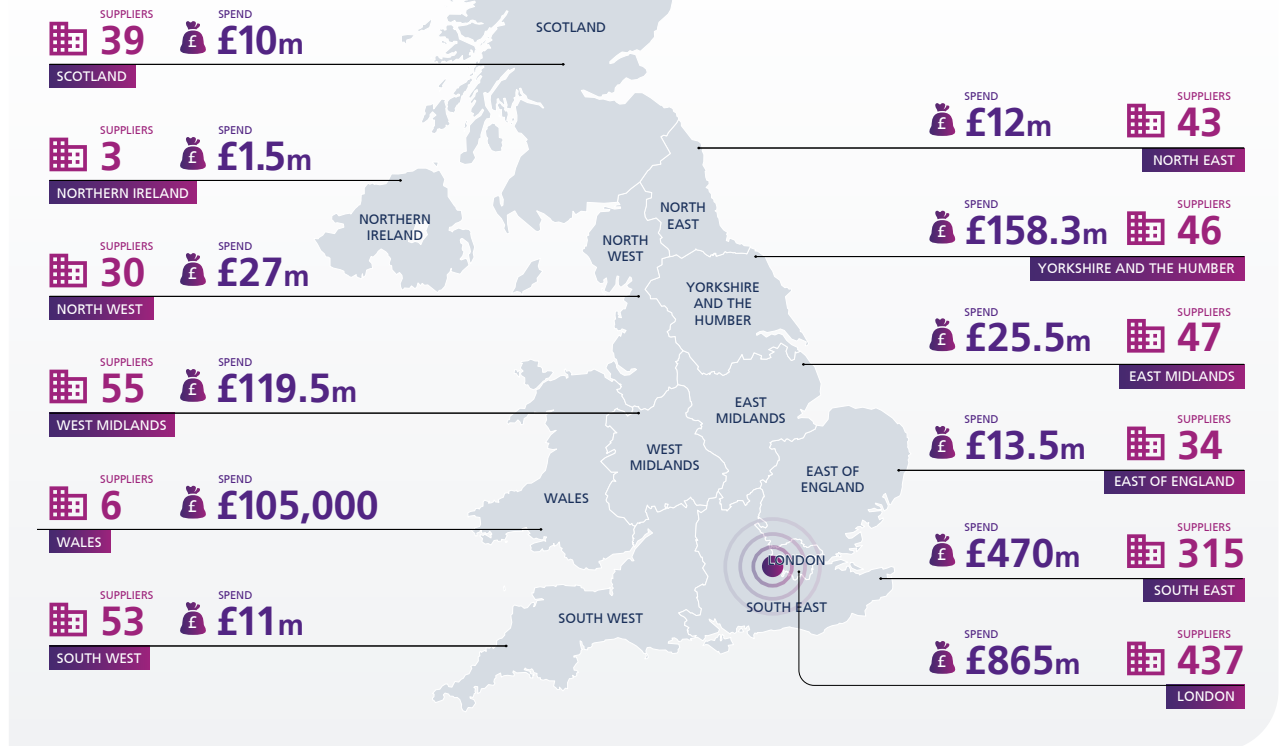
Heathrow's supply chain offers huge opportunities for local businesses in the Black Country.

For example, one of our members, Zaun Ltd manufactured Heathrow's perimeter fence. Zaun is the only in-house British manufacturer of Woven and Welded Mesh Fencing Systems and is a trusted partner of Heathrow. We're delighted to be working with Heathrow to create more opportunities for Black Country businesses in their supply chain and this partnership confirms the Chamber ethos that business is done better together."

**GAIL ARNOLD**

Black Country Chamber of Commerce

## SUPPLIER SPEND BY REGION





Back Heathrow is the voice for over 100,000 residents, businesses, and community groups that want to see a bigger, and better Heathrow.

The airport has bounced back since the pandemic and now has over 90,000 roles on site, and many more across the supply chain. These jobs have made a real difference for the diverse local communities that surround our airport.

The investment and upgrades to the airport over the past year have made a real difference for staff, as well as ensuring that Heathrow remains internationally competitive, continuing to be an airport we are proud to back.

Heathrow ensures investment reaches every region in the UK and thousands of our supporters benefit from that too. Many of them are either employed by small businesses or run one of the thousands of SMEs that depend on Heathrow.

Our supporters are proud to have Heathrow on their doorstep – it is an extraordinary airport supporting extraordinary communities.”



**PARMJIT DHANDA**

Executive Director, Back Heathrow

#### Did you know?



Heathrow is the UK's only hub airport and has invested **£1.1 billion** across over 1,100 suppliers in 2024.



#### What is a hub airport?

As the **country's only hub airport**, Heathrow plays a different role from the other airports in the UK. Hubs work by pooling demand from leisure passengers, domestic and international transfer passengers, business passengers and air cargo. Airlines are able to consolidate passengers and cargo from across the UK and Europe onto long-haul flights. This pooling of demand is what makes more routes and regular flights viable and allows Heathrow to directly connect the UK with 239 destinations in 89 countries.



Heathrow is the **UK's largest port by value**, greater than Felixstowe, Southampton, Eurotunnel and Dover combined.

# FROM INVESTMENT TO IMPACT: HEATHROW'S 2024 INVESTMENTS



## RUNWAY RESURFACING – £100M INVESTMENT

**Heathrow is the busiest two-runway airport in the world. Dating back to the Second World War, our runways are the nucleus of Heathrow.**

Every day, there are around 1,300 take-offs and landings at the airport. The smooth operation of our runways allows passengers and exporters to access 94% of the world's economy. Every ten years, our Southern and Northern Runways are resurfaced.

Between April and October 2024, we worked with a number of leading UK engineering and construction firms on the ambitious £100m investment to resurface our Southern Runway. More than 200 engineers and technicians completed this once-in-a-decade project. This strategic investment ensures the airport remains prepared for the increase in demand expected over peak periods and that Heathrow continues to provide a world-class passenger experience.

The team adopted several new technological advancements to help deliver this complex project. A new 360° visibility detection, awareness and live monitoring system reduced high risk vehicle blind spots and accidents at ground level, and drones were used for the ariel view of the whole operation to identify areas of risk and improvements that could be made.

Throughout the project, Heathrow continued to run a smooth operation and minimise flight disruptions by completing works overnight. Each night, teams installed around 2,700 square metres of asphalt before returning to normal operations every morning.





I've worked on runway resurfacing projects for the last 20 years, but Heathrow is on a different scale.

The levels of resilience needed to deliver the work each night is higher than normal due to the critical nature of the runways and the impact around the world of aviation if we are late or make a mistake. Normally, we lay a single 50mm layer or add additional layers and ramps if doing more but this time we are removing and replacing two layers and 100mm in the same night which is challenging in timings and trying to reduce the heat from the asphalt."

#### GAWAINE YATES

Delivery Project Manager at Heathrow

#### Did you know?

##### What we did:



Laid approximately **50,000 tonnes** of asphalt



Replaced around **1,100 runway lights** with more energy-efficient LED units



Cut over **7 million metres of grooves** into the surface to aid drainage



Upgraded **22 entry exit taxiways** and the runway shoulders – almost the same surface area as the runway

The Southern Runway is **50m wide** and **3659m long** – equivalent to around 40 football pitches.





## CARGO TUNNEL MODERNISATION – £213M INVESTMENT

The Cargo Tunnel is a critical road link connecting the airport's centre to its southern edge.

Running directly below the Southern Runway, the tunnel is 870m-long with a 10m diameter, is single-bore and has traffic flowing in both directions, ensuring our airside traffic including freight, maintenance, catering, baggage and passenger transfers can run smoothly across the airport.

Our £213 million investment will bring the tunnel built in the 1960s up to a modern standard, including:

- Replacement of all outdated systems including ventilation, lighting, air quality monitoring, drainage, emergency telephones, radio, heat detection, public address system and fire points.
- Installation of a fixed firefighting low-pressure system, a first of its type at Heathrow.

This complex but crucial investment will ensure that the tunnel can be upgraded to modern standards, while ensuring that there is no disruption to critical airport operations. All works must take place between 21:00-05:00, and all labour, plant and materials must pass through airport security for every shift, further limiting the available time. The tunnel is so important it can never be taken out of service and its full capacity ready for full service each morning.

Heathrow has committed £42m of spend this year to the project, with a total spend of £213m by the end of 2026. To deliver this project, we worked with 25 suppliers, of which 20 were SMEs. This created 350 jobs across the UK– including 200 from remote suppliers, 100 from our local supply chain, and 50 from professional services.



### CASE STUDY: BRIDEWELL



Based in Ashford Kent, Fire Safe Global is a team of 6 experts, who have been a trusted partner of Heathrow since 2023. Fire Safe Global first worked at Heathrow on the virtual contingency facility (VCF) project and now plays an integral part of the modernisation of our cargo tunnel.



We're delighted to be working with Heathrow on the modernisation of the Cargo Tunnel. Fire Safe Global have been able to support the programme by ensuring that fire safety management during the construction phase has been of the highest standards, whilst at the same time meeting legislative and compliance expectations.

**STEVE LAKIN**

Managing Director, Fire Safe Global

We certainly recognise that a project of this scale, complexity and significance is one of strategic importance to the running of the world's best-connected airport. With over 38 years of expertise, our team bring an unmatched level of fire safety management knowledge to the table, which is crucial to ensure the airport remains operational every day of the year."



## CASE STUDY: CHISHOLM AND WINCH

### CHISHOLM & WINCH

The company began its partnership with Heathrow in the 1990s, working with Bovis to deliver successful projects such as the T3 CIP Lounge and the T1 Redevelopment.

Since then, Chisholm and Winch has maintained a strong relationship with the airport, becoming a trusted and integral partner in its ongoing development. More than 30 years later, the company continues to play a significant role in Heathrow's supply chain. With a proven track record and unwavering commitment, Chisholm and Winch looks forward to contributing to the continued growth of Heathrow's infrastructure for many years to come.

Chisholm and Winch is a construction, refurbishment, and fit-out specialist based in Essex, with over 50 years of expertise.



Chisholm and Winch have been providing building works services at Heathrow for more than 30 years. We pride ourselves on being part of Team Heathrow, working to help ensure the world's busiest airport operates smoothly every day of the year.

Our primary involvement over recent years has been delivering a 1km long Passive Fire Protection Lining to the main Cargo Tunnel. At peak, we had over 60 team members working throughout the night including managers, supervisors, fixers and specialists such as Health & Safety Consultants and Setting-Out Engineers.

The work continuity provided by such a large project gives Chisholm & Winch a solid foundation of work meaning we've been able to develop and train our staff, creating job opportunities and supporting large numbers of families, many of whom live in the local area."

**SIMON CASTLE**

Managing Director, Chisholm and Winch

## NEXT-GENERATION SECURITY CHECKPOINT (NGSC) – £1 BILLION INVESTMENT

The Next-Generation Security Checkpoint (NGSC) is one of Heathrow's largest capital investments, and will see **over £1 billion** invested in our facilities to deliver cutting-edge 3D scanners to enhance our threat detection capability.

These will mean ensuring colleagues and customers continue to stay safe on the ground and in the air. Beyond the new security lanes, this programme looks at how we can use technology to further transform security. This will involve exploring how to optimise the new security capability through technology, process, and people solutions. One of the ways we can achieve optimisation is through the algorithms project, which looks to increase threat detection capabilities using APIDS (Automated Prohibited Item Detection System) algorithms. This new technology increases flexibility to the response of emerging threats and helps provide a more seamless and efficient process through security.

This programme will make our airport smarter and smoother for passengers and an even better place to work for colleagues – it is integral to help us deliver the best airport service in the world. Our supply chain partners, including Tier 1 suppliers Mace and Smiths, are critical to undertaking this upgrade. The scale of the programme to deliver Next-Generation Security and further improve the passenger experience at Heathrow is huge and is creating opportunities for businesses across the UK.

### Did you know?

#### We are currently in the process of:



Replacing **144 security lanes**, more than all other UK airports combined



Training **over 4,000 security colleagues** and **engineering colleagues**, enhancing their skills



Upgrading **15 control posts** and **40 vehicle search lanes**

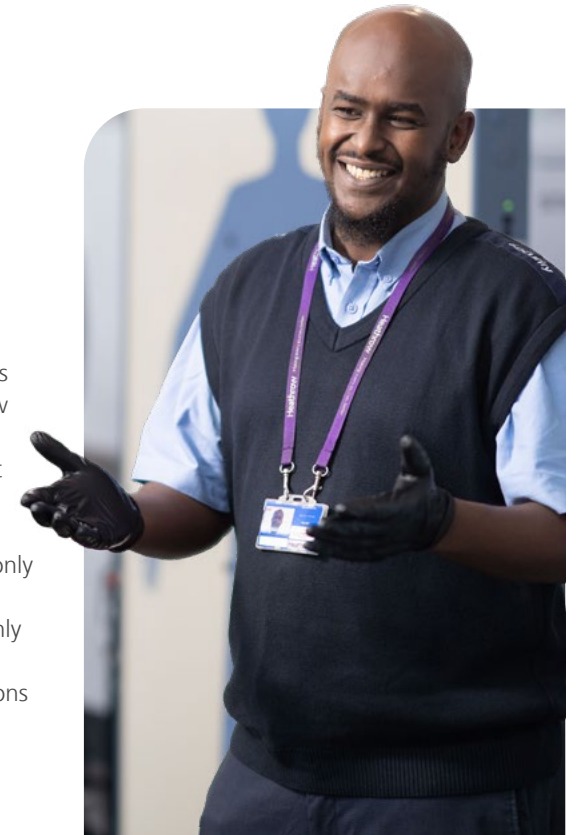


Being our oldest terminal at Heathrow, replacing the security lanes in T3 threw up infrastructure challenges.

Even before we started installing the new security equipment and lanes, we had to make major changes to the building such as strengthening the floors to support the new heavier equipment and moving shops and removing escalators to give us the footprint we need for new lanes. This is all whilst still maintaining passenger flow through the airport. Overcoming these challenges was only possible thanks to the strong collaboration between our partner organisations – not only those based at the airport, but also those suppliers supporting the project in the regions and nations across the UK.”

#### MARTIN EVANS

Project Manager, Heathrow





## CASE STUDY: MACE



Mace is a global construction company, headquartered in London and employing over 7,300 people.

The company has forged a long-standing partnership with Heathrow, recently being appointed to three major projects within the airport's H7 Framework, including a critical security programme.



Heathrow's security upgrade programme is one of Mace's largest current aviation refurbishment projects in the UK, providing significant economic and social benefits.

Mace and our supply chain partners are not only upgrading vital security infrastructure but are also undertaking significant ancillary construction activities alongside this, helping Heathrow to continue to give passengers the best airport service through the Security programme delivery. At its peak, Mace has over 360 people on the programme working day and night, 24/7, in highly skilled construction and project management roles including ten apprentices commencing their careers at Heathrow.

We want to leave a legacy for the local community, and over the last year Mace has given 1600 of volunteering hours back to communities near the airport, engaged with 2724 local students, and have taken part in almost 100 educational and community activities."

**MATTHEW RANDALL**

Pre-Construction Director, Mace



## Did you know?



With over 90,000 people employed on-airport, Heathrow is the **UK's single largest sites of employment**. Over 985 businesses are operating at Heathrow, and we have almost 80 years' experience of investing in our infrastructure to deliver for our passengers, our people and our supply chain.





## CASE STUDY: SMITHS DETECTION

smiths detection

Smiths Detection is a global leader in threat detection and security screening technologies, headquartered in Hertfordshire.

Smiths Detection has worked with Heathrow to provide leading-edge technologies that bring the best security outcomes and passenger experience.



Strengthening our partnership with Heathrow Airport has been a significant focus this year, and we are incredibly proud of what we've accomplished together.

Heathrow's investment in their next generation security programme has allowed us to deliver advanced technologies that enhance safety, streamline operations, and elevate the passenger experience. This partnership highlights a shared commitment to innovation, working together to ensure Heathrow remains a global leader in aviation security."

**JEROME DE CHASSEY**

President, Smiths Detection



## CASE STUDY: ATKINSRÉALIS

AtkinsRéalis

AtkinsRéalis is a world-class engineering services and nuclear organisation that has worked with Heathrow on the NGSC programme.

The team have been an integral part of this project – from using innovative digital tools to help people visualise the changes, to implementing the changes in the terminals.



The Security Programme is a true collaboration. The AtkinsRéalis team of over 150 people works closely with Heathrow and bring together our expertise in infrastructure, technology, and change management to design and deliver a programme that, when complete, will make the experience for everyone that uses security smoother and smarter.

From our most experienced experts to our apprentices and our broad supply chain of SMEs and specialists, everyone has found the working relationship between the partners and Heathrow to be exceptional, with openness, collaboration, creativity, and inclusivity at the heart of the programme's culture. It's an extraordinary programme at an extraordinary airport and we are proud to be playing a leading role."

**MIKE HUNTING**

Complex Programmes Director, AtkinsRéalis



## TERMINAL 2 BAGGAGE OPTIMISATION – £884M INVESTMENT

We are working with logistics manufacturer BEUMER Group, based in the East Midlands, to invest in a state-of-the-art replacement baggage system in Terminal 2 – The Queen’s Terminal, which once complete will serve 20 million passengers per year and process 31,000 bags per day using updated technology to improve resilience.

The project is a pivotal stepping stone to unlock future developments at Heathrow. It will allow the next phase of demolishing Terminal 1, which closed to passengers in 2015, as the legacy baggage system will no longer be required. Optimising our baggage system in Terminal 2 takes our ambitious vision for the ‘heart of Heathrow’ a step closer to reality.

While airlines and their ground handlers are responsible for the majority of a bag’s journey to the destination, Heathrow’s systems swiftly sort and scan up to 140,000 departing bags a day. Maintaining high performance in baggage processing is an essential element for Heathrow to maintain its position as the UK’s only world-class hub.

The total investment in the T2 Baggage Programme will be £884 million up to 2029 when the new system is expected to go live.

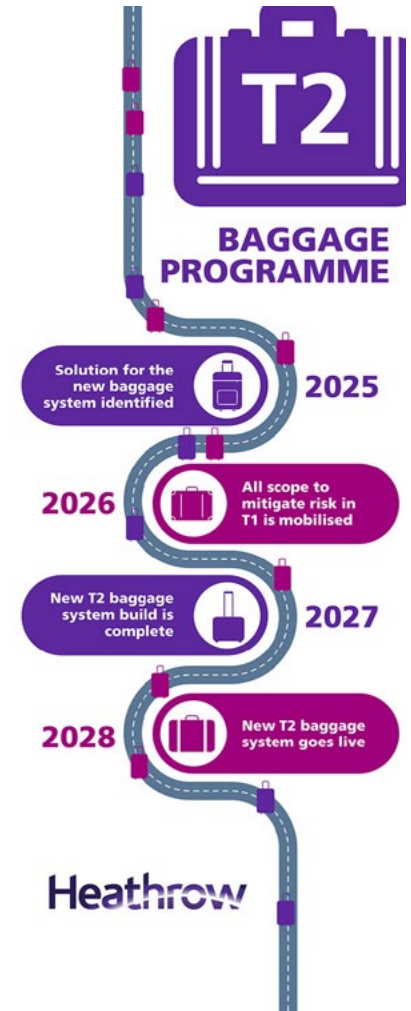


It is a great pleasure to be working with Heathrow on the design and installation of the new baggage handling system in Terminal 2.

We’ve collaborated closely with Heathrow, in the true spirit of partnership to begin delivering this project of strategic importance to the airport. We’ve put all our technological visions into the design of the new state-of-the-art baggage handling system.”

**RONALD WILLEMS**

Airport Director, BEUMER Group



## ASSET MANAGEMENT – £500M OF INVESTMENT

To ensure that Heathrow can deliver an exceptional experience for our customers, alongside delivering new opportunities for businesses across the UK, continuous investments to keep the airport infrastructure operational and to a high standard – at £500 million year-on-year – is our single largest investment. This “routine investment” to keep Heathrow running efficiently also provides consistent employment and investment opportunities across our diverse and UK-wide supply chain.



### CASE STUDY: BRIDEWELL

## Bridewell

Based in Reading, cyber security company Bridewell first began working with Heathrow in October 2018 when their workforce was about 20 people strong.

Bridewell’s first project at Heathrow focussed on a “service type one” cyber security penetration test worth around £5,000. Six years later, Bridewell has around 300 team members, and works with the five largest UK airports as well as many other largest critical national infrastructure companies across the UK.

In 2018, Heathrow sought a supplier for a cyber maturity assessment and target operating model. Bridewell successfully won this project and delivered its first piece of consulting work, contributing to Heathrow’s cyber security infrastructure. Heathrow then selected Bridewell to build its cyber defence centre for monitoring of, detection of, and responding to, cyber incidents.

Today, Bridewell attributes its growth to the confidence Heathrow showed in their services and has been one of the foundations for the company’s scale up and ability to deliver 24/7 services across critical national infrastructure in the UK.



Our journey from 20 to 300+ employees has absolutely happened whilst working with Heathrow and Heathrow has played a really key role in that too.”

### JASPER MARLOW

Head of Sales, Bridewell

# HOW WE SUPPORT SMES TO ENTER OUR SUPPLY CHAIN

## HEATHROW BUSINESS SUMMIT

To support and strengthen our supply chain, we host an annual Business Summit – an invaluable platform for SMEs to connect with Heathrow's supply chain, build meaningful partnerships, and explore opportunities to grow.

The 2024 Summit brought together over 500 local partners, SMEs, and major Tier 1 suppliers to foster collaboration, innovation, and shared success.







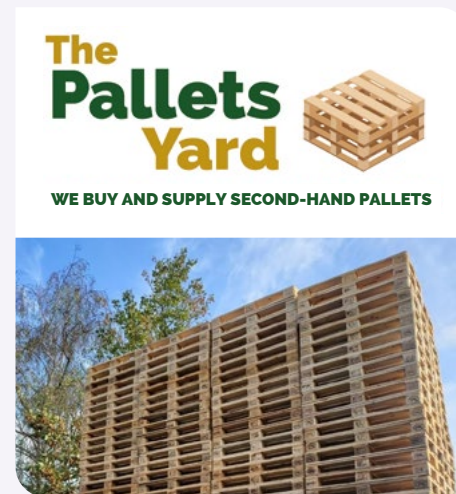
## CASE STUDY: THE PALLETS YARD

The Pallets Yard is a Southall-based SME that buys and supplies quality, affordable, second-hand wooden and plastic pallets for various industries.

Our work with them started in 2023 when our procurement team met its Directors, Ian Leander and Ruth-Anne Lynch, at a dedicated SME event hosted by West London Chamber of Commerce in 2023. Ruth-Anne was later invited to the 2023 Heathrow Summit as a panellist, to provide some insight into The Pallets Yard's journey with Heathrow and its suppliers.

We know that working with large buying organisations like Heathrow can be overwhelming and complicated for micro SMEs. To break down this barrier, colleagues from across Team Heathrow have since provided great support in connecting The Pallets Yard with Heathrow's supply chain as well as helping them get ready to meet necessary requirements in specialised areas such as carbon reporting and Health and Safety management.

The Pallets Yard is now an approved supplier to two of Heathrow's supply chain partners and have begun to deliver projects contributing to Heathrow's sustainability strategy. They have also won business opportunities with other suppliers in our network.



The Pallets Yard is proud to be part of Team Heathrow and our business has gone from strength to strength since being appointed. Through our continual recovery, repair, reclaim and reuse of pallets, our carbon footprint as a circular economy business supports Heathrow in its net zero ambition. We commend Heathrow Airport for its continuous championing of engagement with SMEs, which is essential to their sustained growth, productivity, profitability and long-term survival."

**RUTH-ANNE LYNCH  
AND IAN LEANDER**

Directors, The Pallets Yard Limited



## LIFT OFF

Heathrow Lift Off is a concept developed in 2022 as an additional way to attract and work with SMEs.

Lift Off provides a platform for selected SMEs seeking potential business opportunities to present their products and services to a panel made up of Heathrow experts and our largest supply chain partner organisations. Every quarter, we hold Lift Off events which provide a theme or problem statement centred around Heathrow's business needs for selected SMEs to present on.

The Lift Off programme has resulted in innovative ideas and proposals on a wide range of our operations, including sustainability, health and safety, waste management, inclusive design, passenger experience. Successful participating SMEs received opportunities to trial their ideas which can lead to potential further implementation. The Lift Off initiative has been shortlisted for the "Supplier Collaboration and Innovation Award" by the Procurement Leaders for their World Procurement Awards 2024, demonstrating its positive impact.

So far, we have hosted 57 SMEs and more than 70 panellists from Heathrow and our supply chain partners in the eight Lift Off events we delivered.



### CASE STUDY: ONWAVE



Technology to improve health, safety and productivity: Onwave showcased their OWL portal that can enhance health, safety and wellbeing and productivity for onsite works using geofencing technologies alongside wearable devices.

The initial trial of the technology, conducted with our programme partner Volker Fitzpatrick during the Southern Runway Project in July 2024, has proven successful. We are now exploring potential wider applications with Onwave across Heathrow's construction programmes.



The Lift Off program was well-organised by Isabelle and it gave the team at Onwave the opportunity to speak to leaders at Heathrow directly about how our technology solution can be used airside."

**JAY MOORHOUSE**

COO, Onwave



## CASE STUDY: VUALA

**VUALA**  
Food waste recycling made easy

Innovating to improve Heathrow's recycling rate: A start-up company local to Heathrow, proposed its automatic food waste separation solution that can optimise food waste handling processes and improve recycling rate. The initial trial is scheduled to run from December 2024 in our Terminal 5 staff canteen, with potential scope to be scaled up.



The Lift Off programme has been a unique and fantastic way for SMEs to connect with the Heathrow ecosystem along with bigger industry players. This is a programme that make real partnership happen! Thank you to the Lift Off team!"

**ABIEL MA**

CEO and Co-Founder, Vuala



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**Heathrow**