

Heathrow

# OUR PROPOSAL FOR EXPANDING HEATHROW

THE UK'S GATEWAY TO GROWTH



SUMMER 2025





*The UK business community supports the expansion of Heathrow with a third runway – an investment in the nation's future. The benefits are clear: for exporters, it opens up vital access to major and emerging markets; for visitors, it enhances global and domestic connectivity; and for businesses, it unlocks billions in private investment, strengthening supply chains, creating jobs, and driving skills across the country."*

Confederation of British Industry, British Chambers of Commerce, MakeUK, Federation of Small Businesses, Institute of Directors



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# FOREWORD



## OUR PLAN TO EXPAND THE UK'S GATEWAY TO GROWTH

The Government's number one priority for the country is economic growth. It is only through economic growth that living standards across the country will be raised. Businesses will be incentivised to hire and train more people. Innovators and entrepreneurs can be bold in pursuit of their ambitions. And the country will have the financial strength to invest in and improve public services.

That is why economic growth must be at the centre of long-term plans for the UK. The Government's Industrial Strategy champions the country's world-class sectors – from health and life sciences, to cutting edge AI, vibrant creative industries and the green energy revolution. The UK's Trade Strategy aims to maximise opportunities for exporters and creators across the country to pursue growth around the world. And the forthcoming National Visitor Economy Strategy will help ensure the UK remains one of the most desirable countries to visit in the world – building the UK's global brand while boosting tourism and hospitality in every nation and region.

These plans for the country's future rely on the same thing: global connectivity. To compete and win on the world stage, the UK must remain deeply connected to international markets. And for that, aviation is essential.

Airport capacity must be a foundation of the UK's economic ambitions. This is why earlier this year, the Chancellor, Rachel Reeves, confirmed Government support for an expanded Heathrow, to provide additional capacity at the UK's only hub airport and the unique opportunities for global connectivity that would deliver.

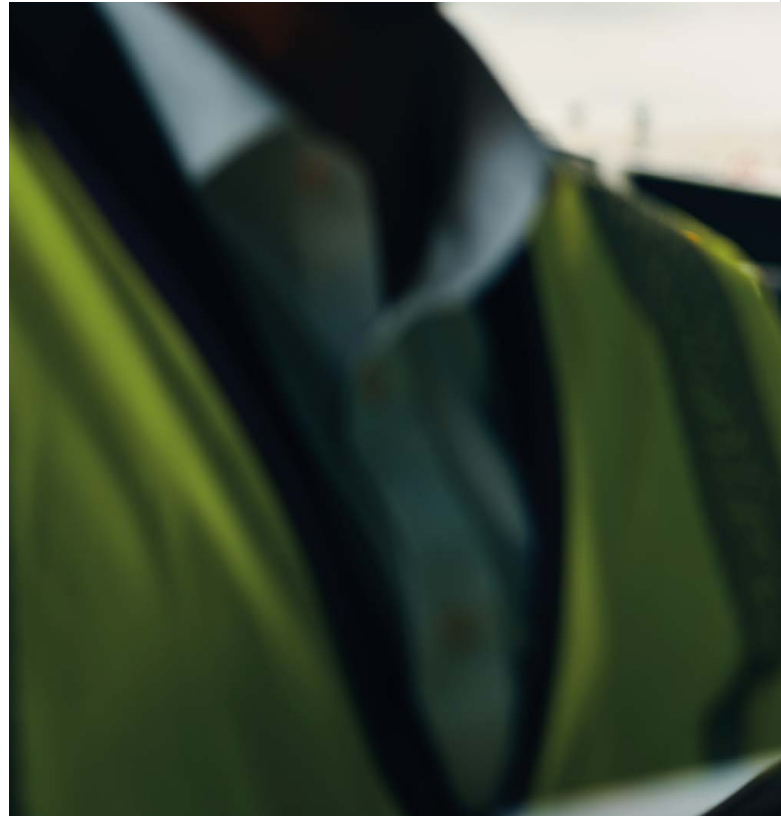
Support for an expanded Heathrow is not new. Over recent decades, every time the evidence has been considered, the options assessed, and the economic modelling completed, there has always been a clear answer; that Heathrow is at the heart of the UK's economic prospects and should expand.

In 2020, we paused our plans and were focused on viability during, and recovery after, the pandemic. But today, Heathrow has not simply recovered – it is thriving. Every month we break new records for passenger numbers. And, as a result, Heathrow is once again operating at capacity.

Meanwhile, global hub airport competitors across Europe and the Middle East are expanding. They are investing in hub connectivity and pulling trade and talent toward their economies. The Government's renewed support for expansion seeks to reverse this trend.

Earlier this year, at British Steel in Scunthorpe, I announced a multi-billion-pound investment programme to modernise Heathrow, our first step toward expansion. We signed the UK Steel Charter, committing to support UK industry, as we invest in the UK's Gateway to Growth. And we confirmed our intention to submit a proposal to expand, aligned with the Government's ambitious timetable and in open dialogue about the policy and regulatory support required.

The response has been overwhelmingly positive. Chambers of Commerce across Scotland, Wales and Northern Ireland have welcomed the benefits Heathrow expansion will create for businesses across all three nations. MPs representing steel communities welcomed the opportunities this brings for the UK steel sector. Businesses across the country, from Truro to Newtown, Belfast to Manchester and Newcastle to Glasgow, celebrated the prospect of better access to global markets. Trade unions including GMB, Unite, and Community reaffirmed their long-standing support. Local Chambers of Commerce, educators, and construction firms are ready to roll up their sleeves and get to work. And our incredible colleagues – including Team Heathrow – know that expansion is essential to delivering the level of service our passengers and airlines deserve.



At Heathrow, excellent service is delivered every day - by teams working in a space-constrained hub airport operating at capacity but always going the extra mile for our customers. So far, in 2025, we have seen tangible improvements in punctuality, baggage connections and security waiting times to put Heathrow back at the top of league tables. Now, to continue to improve our service and deliver a further step-change in passenger experience, Heathrow needs to grow.

With a third runway, we can truly deliver as the UK's front door for investors. Serve the country as a source of national pride and economic strength. And deliver more as the UK's global gateway to growth and a symbol of national renewal across the country.

I am proud to submit our proposals to expand and modernise Heathrow – a 100% privately financed plan. And every penny will be delivered efficiently, affordably, at no cost to the taxpayer and at pace.

Our proposal for expanding Heathrow will drive benefits for the whole UK in increased connectivity and economic growth, benefiting the Exchequer and subsequently people across the country by strengthening public finances. It will reduce fares through increased competition and facilitate additional routes to new global and domestic destinations.



And it goes hand in hand with our firm commitment to deliver net zero emissions by 2050. This is not about a choice between the economy and the environment; we will deliver for both. This plan builds on decades of economic evidence, shaped by years of consultation and engagement with our local communities. It reflects what we have heard from those who will be most impacted by expansion. And it has been updated to reflect the needs of the country today.

With a green light from Government, and the correct policy support, we are ready to mobilise and to start investing billions of pounds in our supply chain across the country this year. Our aim is to secure planning approval by 2029 and for the first flight from the new runway to take off within a decade.

It has never been more important or urgent to expand Heathrow. We are uniquely placed to do this for the country; it is time to clear the way for take-off.

**THOMAS WOLDBYE,  
HEATHROW CEO**



# PART A OUR PLAN FOR EXPANDING HEATHROW



# EXPANDING HEATHROW AT A GLANCE

Heathrow is more than an airport – it is the UK’s Gateway to Growth. Our plan means investing in our future, and the UK’s future.

## £49bn

We would invest £49bn of private money to deliver our future airport including £21bn for the third runway, and £27bn for new and upgraded terminals and the supporting infrastructure.<sup>1</sup> This will be the largest privately financed infrastructure project in Europe and will add 0.43% to the UK’s GDP by 2050.



Built on years of analysis and engagement, our plan is the only one that, with the right policy levers in place, could **meet the Government’s timeline** of securing planning approval by 2029 and delivering **an operational third runway in a decade**.



We will continue to **engage closely with those impacted by expansion**, mitigating impacts and working with our local communities to ensure we deliver benefits and long-term growth for the area, including delivering tens of thousands of local jobs.

The expanding Heathrow programme comprises of:



Up to 3,500-metre third runway located north-west of the airport and associated taxiways, designed to accommodate aircraft of all sizes and deliver up to **276,000 additional flights a year** from 480,000 to 756,000.



**A new terminal complex** to the west of Terminal 5, “T5X”, including a new satellite terminal to the north, “T5XN” to create extra capacity and support excellent passenger experience.

**Redevelopment of the Central Terminal Area**, upgrading existing terminals to deliver consistent service throughout Heathrow and adding further capacity, including extending Terminal 2. This will lead to the closure of Heathrow’s oldest terminal, T3.



**New and upgraded supporting infrastructure** including increasing cargo capacity by 50%, reconfiguring surface access, including the realignment of the M25 motorway below the new runway; and parking facilities including an expanded public transport interchange.

<sup>1</sup>When taking into account decimal places, the total adds up to £49bn due to rounding



The Airports Commission estimated that expansion could support at least **30 new daily airline routes by 2040**, including **approximately 10 new long-haul destinations**.<sup>2</sup> Our plans would enable airlines to offer more frequent flights on existing routes, significantly increasing passenger capacity at the airport. This will give passengers more choice and allow airlines to grow their networks, unlocking significant opportunities for trade, tourism and inward investment, unleashing more growth across the UK.



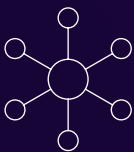
In line with the Government's target and our existing commitment, our plans are compatible with **meeting net zero by 2050**. This can be achieved through accelerating the use of sustainable aviation fuel, greenhouse gas removals, incentivising more efficient and zero-emission aircraft use, and improving airspace efficiency.



The third runway would increase Air Traffic Movements (ATMs) by **276,000 a year, to 756,000**. With additional terminal capacity delivered through expanding and modernising Heathrow, overall capacity will increase up to **150 million passengers** per year.



**Increasing access to and use of public transport** is a key part of our plan, enabling passengers and colleagues to travel to and from the airport in a sustainable way. This includes investing in bus and coach links, enhanced bus capacity in the re-developed central Passenger Terminal Interchange, and bus priority lanes in the new Southern Road Tunnel. We are exploring options for new rail schemes to unlock further connectivity across the UK.



Expanding Heathrow also means **more domestic connectivity** opportunities. We will ensure all of the UK is able to take full advantage of our hub network through our continued commitment to supporting domestic connectivity and advocating for regional routes to connect in to Heathrow.



**Limiting and reducing noise** is an important part of our plan. We will build on our existing schemes to insulate homes and schools, continue operating restrictions, and incentivise airlines to fly the quietest aircraft at Heathrow. Redesigning flight paths and taking advantage of the operational flexibility a new runway would provide predictable respite for local residents.

<sup>2</sup> Airports Commission Final Report, July 2015



Heathrow has seen significant improvements in **air quality** over the last decade, with all pollutants below regulated levels set by Government. Our plan ensures continued full compliance with legal limits by investing in clean technology and sustainable transport. **Conserving nature and environmental protection** is also integrated into all stages of design, construction and operation of the project, delivering a measurable net gain in biodiversity.



To meet the need for additional capacity required to maintain the UK's hub status, a runway that can accommodate the largest commercial aircraft is required. This will impact the motorways surrounding Heathrow – either the M25 or the M4 spur road. We have engaged with DfT, the AA, RAC and National Highways to design a plan to **realign a section of the M25 motorway** approximately 130 metres westwards and lower it, allowing it to pass beneath the runway in a new tunnel. To limit disruption and maintain traffic flows, the construction works would be undertaken away from the existing M25 before traffic is switched over to the new route.

This document is an overview of Heathrow Airport Limited's submission to Government, in response to the Department for Transport's letter published 30th June 2025, inviting proposals for a third runway at Heathrow to be brought forward. Neither our proposal to Government, nor this document, are planning applications and do not include all the information that would be included in any future planning application to expand Heathrow.

The Government is now reviewing proposals to expand Heathrow. Subject to the Government confirming Heathrow Airport Limited as the organisation to take forward plans to expand Heathrow, we are committed to engaging and consulting with stakeholders to further develop our proposal. All stakeholders, including our airlines, local community, local authorities, businesses and others will have opportunities to feed into Heathrow's proposal with the aim of a planning application being submitted in 2028.



## WHY EXPANDING THE UK'S HUB AIRPORT MATTERS

Heathrow is the UK's only hub airport and is pivotal to the nation's ability to trade and compete globally. Expansion will allow Heathrow to maintain our status as the world's best connected airport and continue delivering for all of the UK.

### HEATHROW: THE UK'S ONLY HUB AIRPORT

As a hub, Heathrow does not compete with other UK airports. We work with and complement them by acting as a central interchange to enhance connectivity between all of the UK and the rest of the world.

By bringing passengers together from across the country and beyond, we help airlines fill flights with people and goods travelling to, from and through Heathrow. This makes more routes possible and will keep the UK better connected globally than it otherwise would be. We pool demand from across the UK and Europe to connect business and passengers to...

# 230

destinations in over

# 85

countries, including more than

# 30

destinations that are not accessible from other major European hubs and markets, including Tianjin, Nashville and Dhaka.



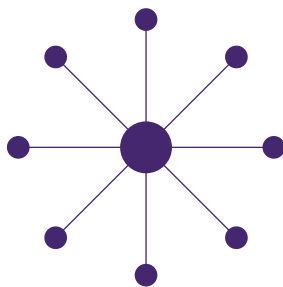
## WHAT IS A HUB AIRPORT?

Hub airports connect passengers and cargo between multiple destinations via a central point (just like the hub on a wheel with spokes reaching out to many places) more efficiently than point-to-point routes.

Unlike point-to-point airports, which rely solely on local demand for direct flights between two destinations, hub airports bring together direct passengers, transfer passengers, and cargo. This allows airlines to fill aircraft more consistently and serve routes that would not be viable otherwise.

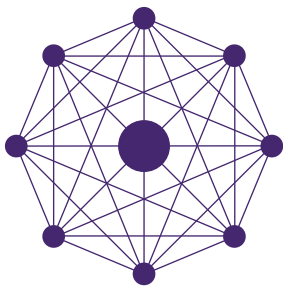
For passengers and exporters a hub airport means direct, more frequent year-round connections to locations that could not otherwise sustain the required levels of connectivity.

**A hub airport is the most efficient way of connecting many points:**



**Hub**

linking 9 points requires 8 routes



**Point-to-Point**

linking 8 points requires 28 routes

## Why aren't two hubs better than one?

Hubs work by pooling demand from passengers and exporters to make more routes and regular flights viable. Two or more hubs do not work because they split this demand, making fewer routes and flights possible.

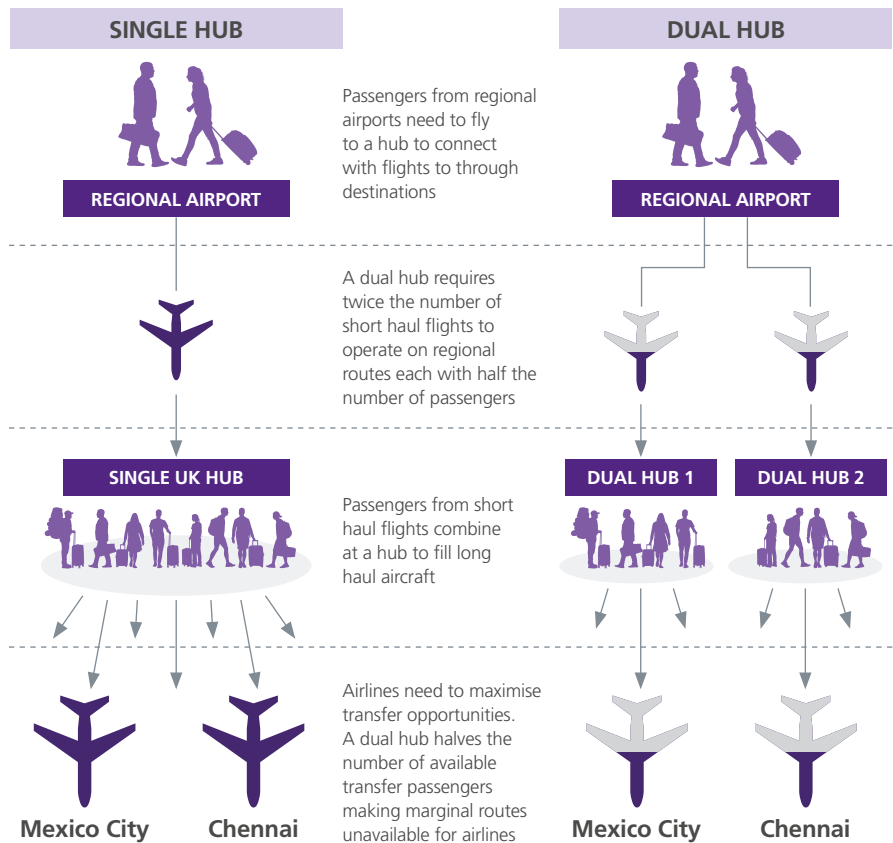


Figure 1 | How a hub airport works

## THE RISK TO HEATHROW’S HUB STATUS

Heathrow, and the UK, is at risk of losing our global aviation hub status in the face of growing competition from European hubs like Amsterdam, Frankfurt, Madrid and Istanbul. Following the pandemic, Heathrow recovered faster than these other hubs, proving demand for Heathrow is there. But while our international competitors have room to grow, continuing to secure new long-haul routes and strengthen their own hub operations, Heathrow is already operating at full capacity. Without the ability to grow, we will fall behind other European and global aviation hubs, harming opportunities for the UK economy.

### HEATHROW IS AT CAPACITY

Heathrow has run out of space – for passengers, aircraft and runway slots. In 2024, 83.9 million passengers passed through Heathrow, above the 82 million that the airport was designed to handle. In 2025, we are continuing to break passenger number records. January to June 2025 was the busiest first six months of the year ever, with 39.9 million passengers flying through Heathrow. Under current planning conditions, Heathrow is allowed to serve up to 480,000 flights every year (just over 1,300 every day) and consistently operates at 99% of that limit.

Heathrow handles more than twice the number of passengers and flights per runway and per km<sup>2</sup> than the average at comparable hub airports such as Frankfurt, Paris Charles de Gaulle and Amsterdam.

Some of our terminals have peak periods that exceed the designed capacity and are heavily utilised throughout the day. These conditions risk reducing the quality of service for passengers and airlines with delays and congestion caused by being at capacity, challenging operations.

By unlocking capacity, pressure on Heathrow’s infrastructure would reduce, increasing quality of service for passengers and airlines.

### DECLINE IN TRANSFER TRAFFIC

We are already seeing a decline in the share of transfer traffic at Heathrow. Connecting passengers, many of whom originate from the UK’s regions and nations, are critical to maintaining route viability and our hub status. Their presence enables airlines to make direct routes commercially sustainable by allowing airlines to serve thinner direct markets. Without transfer traffic, the UK’s global reach would suffer. In 2024, 21% of Heathrow’s passengers were transferring, compared with 37% at Amsterdam and 49% at Frankfurt.

The lack of regional connectivity further compounds the issue. While Heathrow serves 13 UK regional airports, Amsterdam Schiphol links to 23 across the UK. This means passengers from across the UK are increasingly forced to connect internationally through foreign hubs rather than through the national gateway. As a result, UK demand is sustaining and growing competitors’ infrastructure rather than contributing to domestic growth.

This undermines Heathrow’s hub status, the UK’s global hub status and weakens the overall connectivity of the UK network. Expansion would enable Heathrow to strengthen our network, restore regional access, and support a wider range of long-haul destinations. This would cement Heathrow’s position as a leading hub and support the UK’s competitiveness in global aviation and trade.



*There is a critical need for additional capacity at the UK’s hub airport, Heathrow, to maintain the UK’s global aviation hub status”*

**ANPS, (para. 2.6)**

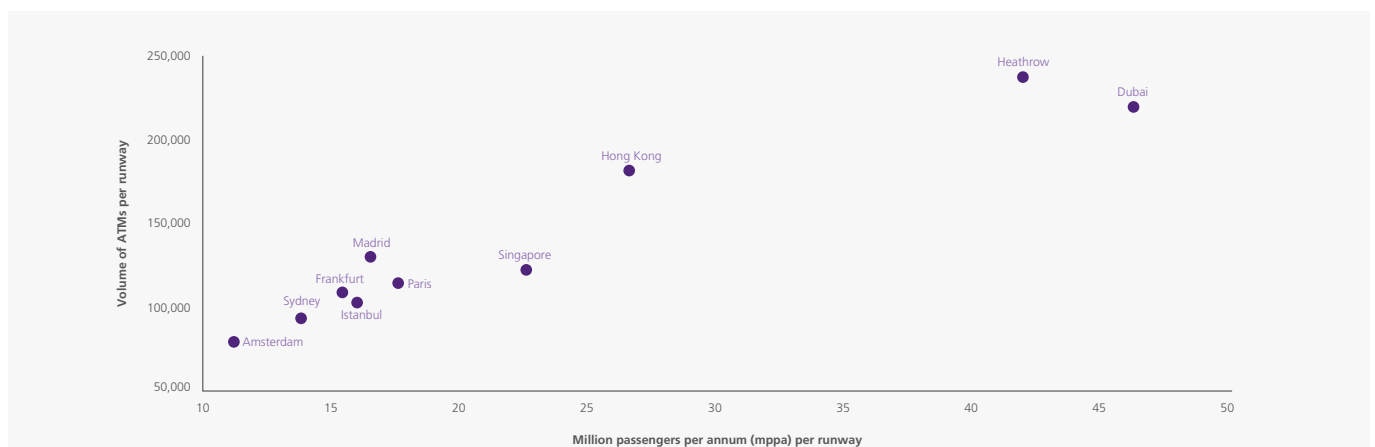


Figure 2 | Comparing international hub airports number of Air Traffic Movements (ATMs) and passengers per runway

### COMPARING TO OTHER INTERNATIONAL HUBS

Although Heathrow is a name recognised around the world, long-haul passengers and freight companies have a growing choice of airports to transfer through.

Heathrow is currently the busiest airport in Europe, despite being the smallest major hub by size. But we are facing growing competition from airports without the same constraints. Some of Heathrow’s main competitors across Europe and the Middle East are not subject to the same limits on air traffic movements and either already have more runways or are actively investing in new runway and terminal capacity.

Between 2024 and 2050, Paris, Frankfurt, Madrid and Amsterdam are delivering 36 separate capacity enhancement projects, enabling them to absorb future demand and secure long-term airline growth. Passenger levels at Heathrow remain high, but airports such as Istanbul, Doha and Frankfurt have increased the number of routes they offer. Airports like Amsterdam and Dubai offer more frequent and accessible services to cities across the UK than Heathrow. These services now play an increasing role in connecting UK passengers to the global economy.

Despite strong demand from airlines, Heathrow cannot add new long-haul services, as all available runway slots are filled, with airlines being frequently turned away due to lack of runway capacity. While Heathrow remains constrained, other airports are investing for growth. Simply put, without expansion, Heathrow will fall behind – but with expansion, Heathrow can retain and grow our world status, which benefits the whole UK economy.



Figure 3 | Other hub airports runway and physical space comparison

### EXPANSION OF OTHER UK AIRPORTS

Expansion at other UK airports should not be seen as a replacement for the additional hub capacity which is needed at Heathrow. Expanding other UK airports would offer additional point-to-point capacity, but cannot provide the scale or network

efficiency of a hub. Heathrow remains the only airport in the UK with the scale, demand, and international role capable of sustaining the breadth and frequency of global connections required to be a hub airport.

### IN SUMMARY

The Airports National Policy Statement, Airports Commission, Chancellor’s January speech on growth and the Department for Transport’s subsequent policy statement have all confirmed that a third runway at Heathrow, which would deliver additional connections, capacity and exports, is vital for growth.

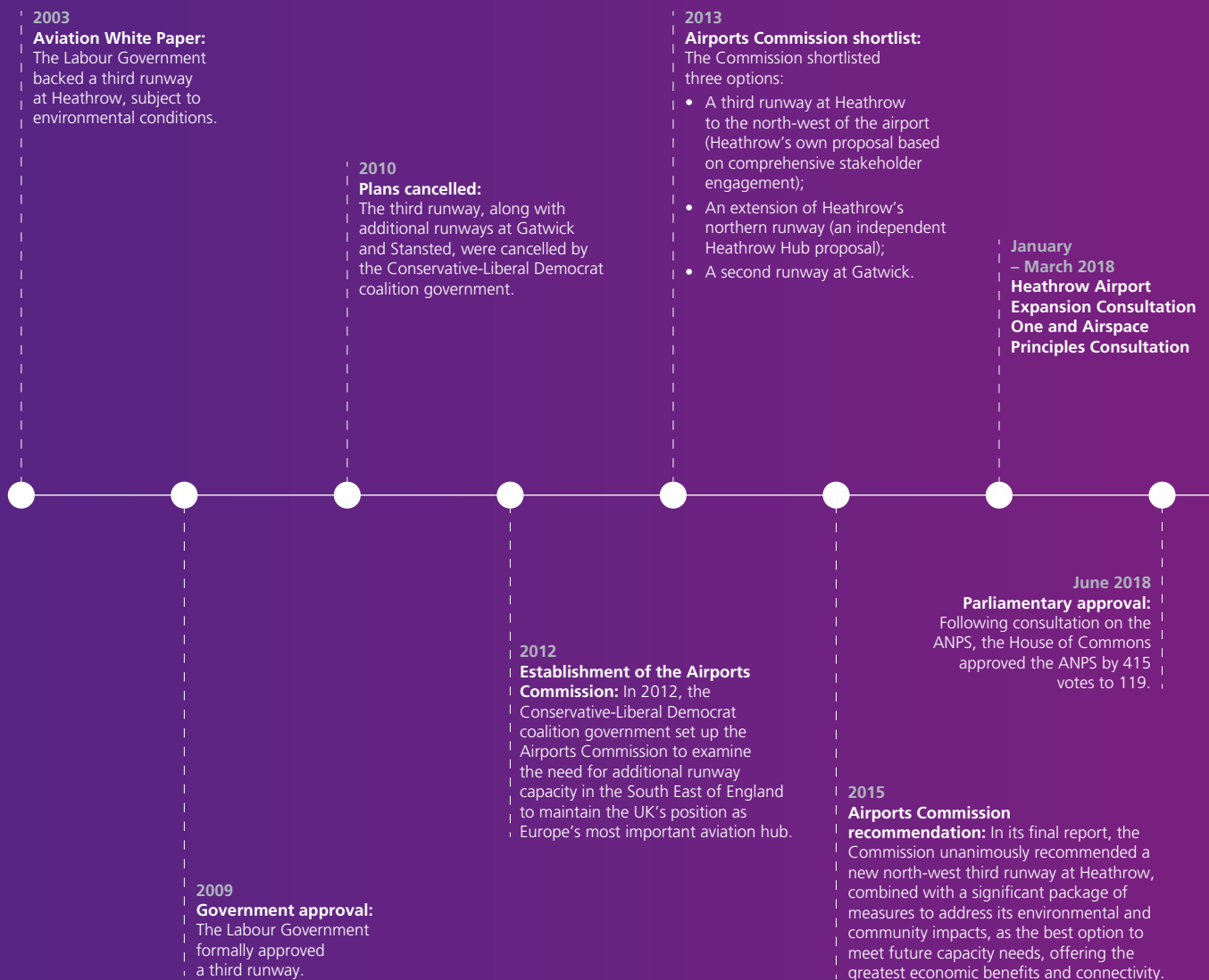
With Heathrow already operating at capacity and demand on the rise, expansion is key to ensure the UK is not surpassed by global competition from other countries’ hub airports. Expanding Heathrow would shore up and accelerate our leading hub status and protect this national infrastructure asset for the future.

## OUR JOURNEY TO EXPANDING HEATHROW

The concept of a third runway at Heathrow has been under discussion for decades. Following the unanimous recommendation of the Airports Commission in 2015, we invested in detailed planning, design development and consultation to form our current proposals. The expansion plans we have submitted rest firmly and confidently on the expansion proposals previously put forward. They are designed to meet the needs of the country, our passengers, our airlines, and all our stakeholders.

These plans build on years of research, analysis, and engagement. They have been tested and refined through consultations, stakeholder engagement, parliamentary scrutiny and detailed assessment of the type of aviation capacity the UK needs to grow.

A brief history of expanding Heathrow:



Our proposals are underpinned by years of comprehensive research and analysis, shaped at every stage by input from a wide range of stakeholders. We will continue this collaborative approach to ensure that expansion delivers benefits at both national and local levels. We have never been better prepared to deliver this transformational project than today.

**June 2018**

**ANPS designated:** The Conservative Government publishes the Airports National Policy Statement (ANPS), setting out policy support for the north-west runway scheme at Heathrow based on the Airports Commission's recommendation.

**December 2020**

On appeal, the UK Supreme Court found that the ANPS was produced lawfully and it was reinstated.

**June – September 2019**  
**Heathrow Airport Expansion Statutory Consultation**

**February 2025**  
**Get Britain Building:** Heathrow announced investment plan to expand the UK's Gateway to Growth and confirmed plans to submit proposal to the Government in 2025.

**July 2025**  
**Heathrow submits proposal to Government**

**January – March 2019**  
**Heathrow Airspace and Future Operations Consultation**

**March 2025**  
Heathrow resumed engagement with the Planning Inspectorate.

**February 2020**

**Project Paused:**

UK Court of Appeal ruled that decision to designate the ANPS was unlawful because in producing it the Secretary of State had failed to properly consider the Paris Agreement on climate change. During and following the pandemic, Heathrow focused on recovery of aviation industry, supporting local communities and airline partners as a result of decimation of demand.

**January 2025**

**Government backed expansion:**

Chancellor Rachel Reeves announced the Labour Government's support for expansion.

## WHY HEATHROW AIRPORT LTD SHOULD TAKE FORWARDS EXPANSION

Heathrow Airport Ltd is uniquely placed to expand the airport, and we are the only organisation that can do so in line with the Government's timeline and ambition of achieving development consent by 2029.

As the owner and operator of the airport, we have the site-specific knowledge to integrate new capacity with existing infrastructure. We have detailed solutions in place for the complex engineering, planning and environmental challenges associated with delivering a third runway and terminal capacity on an operational and space constrained site. And we have a strong track record in delivering infrastructure projects on time, on budget and safely. That track record means we are already a partner to local communities, businesses and government – and can be trusted to drive positive outcomes for passengers, airlines, our supply chain and local communities.

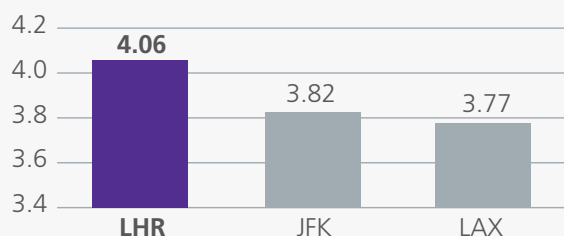
Heathrow is uniquely placed to be able to privately finance the significant investment required to design and deliver this scheme. We are committed to ensuring that the project is delivered efficiently, creating value for all of our customers.

Introducing alternative promoters would mean missing the Government's timeline for delivery. Not only would other promoters lack the operational site expertise required, but it would mean fundamentally changing Heathrow's operating structure and the legal and regulatory framework that underpins it. It is unlikely that any third party would be able to close its financing arrangements and start main construction works until the regulatory changes are finalised, nor deliver on local community obligations, delaying expansion and its benefits to the UK. But Heathrow is shovel ready, building on years of detailed planning and engagement to get here. And we enjoy wide support thanks to the long-term consultation we have carried out with all those who would be affected by expansion.

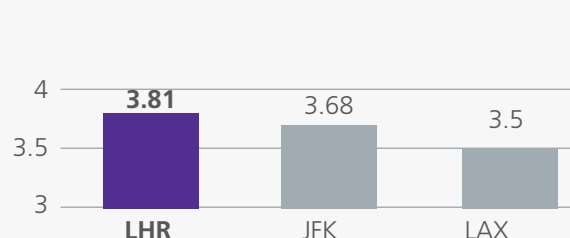
A fragmented approach to airport operations also carries risk. When third parties run competing airport operations, it can lead to worse passenger outcomes, less connectivity and reduced efficiency. For example, JFK and LAX, which have different operators running competing terminals, rank far lower than Heathrow on these metrics, with passengers travelling through Heathrow more satisfied with overall service and ease of connecting.

Passengers travelling through Heathrow are more satisfied with overall service and ease of connecting compared to passengers at JFK and LAX.

ASQ Q1 2025:  
**Overall Satisfaction**



ASQ Q1 2025:  
**Ease of Making Connections**



And when there are incidents, airports with split operators are, by their nature, less resilient – an airport run by a single operator can ensure a more coordinated and aligned response.

Figure 4 | Comparing international hub airports Airport Service Quality (ASQ) score for 2025

In 2018, JFK was hit by major snowfall which resulted in severe disruption to operations.

Reviews into the incident after the fact found that there were “deficiencies in communication” and “inadequate overarching leadership by JFK management”.

Due to the split terminal operating model at JFK, the airport was unable to coordinate responses between the Port Authority officials, the terminal operators, and airlines.

An integrated hub operator can manage capacity and infrastructure more efficiently. For example, during the Covid-19 pandemic, Heathrow facilitated 100 airline relocations.

Airports are complex systems where many organisations must work together, and this would be even more true during a complex expansion project. Having a central point of accountability overseeing the whole system enables clearer decision-making, particularly in periods of disruption. The successful operation of the system as a whole to the benefit of passengers and airlines comes before commercial self-interest of competing parties.

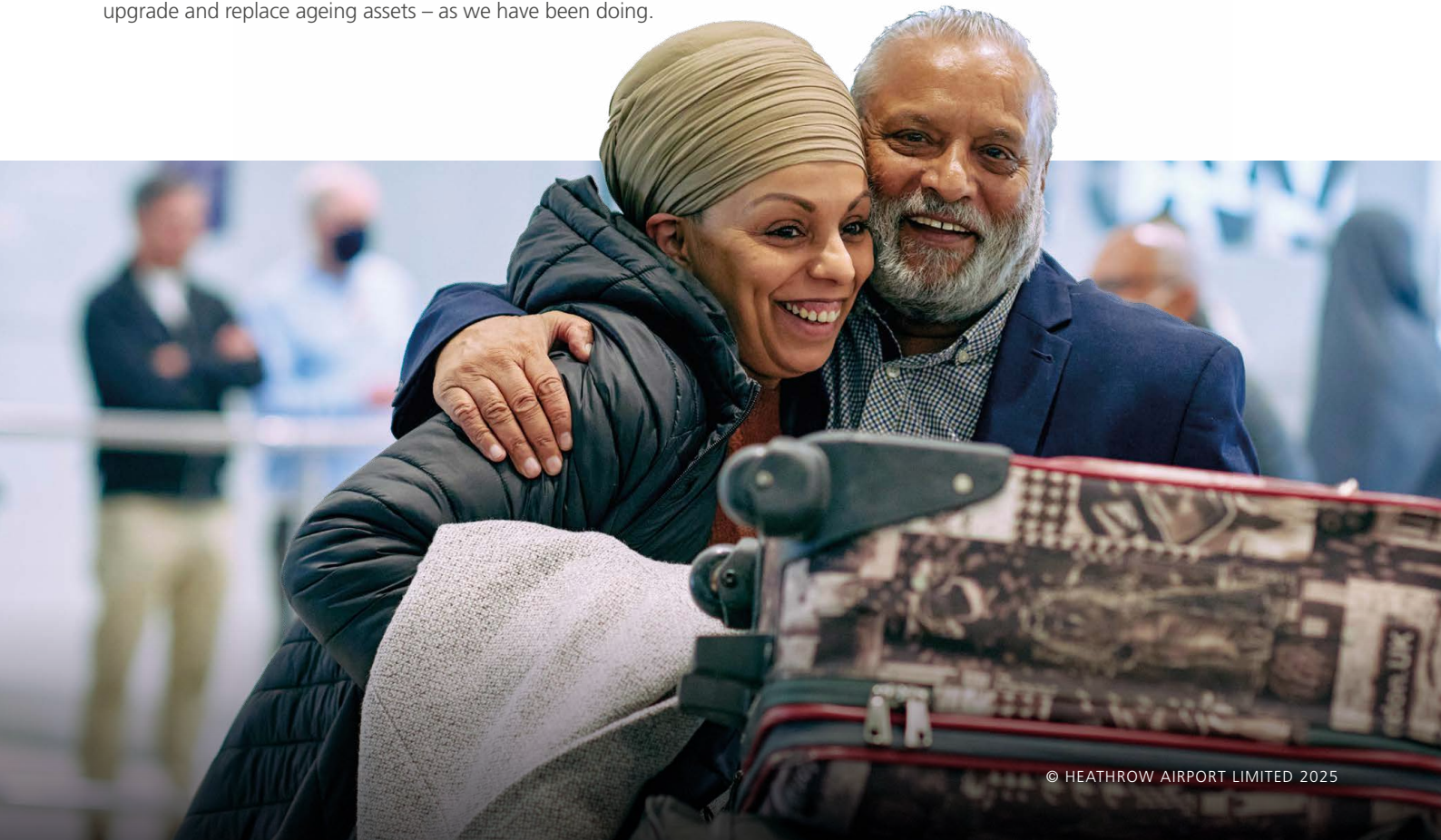
Hub airports, like Heathrow, particularly benefit from the clear accountabilities of a single operator because of the high proportion of connecting journeys. Individual operators would have no incentive to deliver a smooth connections experience across the airport system; a single operator does.

Heathrow looks at opportunities across all terminals to maximise the use of infrastructure and ensure the best experience for airlines and consumers. Tenants are also less likely to take care of terminal infrastructure, whereas Heathrow has incentives to upgrade and replace ageing assets – as we have been doing.

### IN SUMMARY

Building a third runway and new capacity at Heathrow is a major infrastructure project and a significant undertaking – and requires a serious, credible plan. That is why we are proud to bring forward our plan, which has been built, revised and tested through many years of stakeholder engagement, consultation and economic analysis of the aviation capacity that is needed for the UK.

With decades of work and experience behind us, Heathrow is the only organisation that can meet the Government’s vision for expansion and meet its timetable to unlock the benefits for the UK economy, passengers and airlines.



## OUR SCHEME

We are proud to bring forward our proposal for expanding and modernising Heathrow and stand ready to deliver it in addition to our existing multi-billion-pound investment in upgrading and modernising existing infrastructure. Our proposal will not only deliver a third runway, a new terminal complex, and upgraded airport facilities, it will also modernise the ageing Central Terminal Area, extend Terminal 2, and includes the phased closure of Terminal 3. Our proposed investments also include enhanced rail capacity, improved bus and coach services, and walking and cycling infrastructure, as well as environmental and community measures. Our plan would create an airport that is fit for the future, is focused on value for money, enabling the quality of service that global passengers expect, and unlocking benefits for the whole of the UK.

We have developed our proposal with a clear focus on the potential benefits for everyone who uses, works at or lives near the airport: airlines, passengers, colleagues, local communities and businesses in both the neighbouring area and around the country, with our eye on environmental responsibility and operational excellence at all times.

Heathrow's proposal is the only solution capable of meeting the Government's ambition of achieving development consent by 2029, because it can draw on the strong foundation of existing work and long-term engagement with those who need to help deliver it.

The third runway would increase Air Traffic Movements (ATMs) by 276,000 a year, to a total of 756,000 per year. Additional terminal capacity that would be delivered through expanding and modernising Heathrow would bring overall capacity up to 150m passengers per year.

- Expanding Heathrow delivers the core capacity uplift required to meet national demand and need. This comprises key elements including: A 3,500-metre third runway located north-west of the airport and associated taxiways, designed to accommodate aircraft of all sizes and deliver up to 276,000 additional flights a year.
- A new terminal complex to the west of Terminal 5, the satellite terminal "T5X", and a new satellite terminal to the north, "T5XN", to create extra capacity and support excellent passenger experience.
- New and upgraded supporting infrastructure including increasing cargo capacity by 50%, reconfigured surface access, including the realignment of the M25 motorway below the new runway; and parking facilities including an expanded public transport interchange.
- As part of our long-term masterplan to modernise Heathrow, we will redevelop the Central Terminal Area, close Heathrow's oldest terminal, T3, and upgrade existing terminals to deliver consistent service throughout Heathrow and add further capacity, including from extending Terminal 2.

### A visualisation of the masterplan



## THE THIRD RUNWAY

The proposed third runway is 3,500 metres long and 60 metres wide, long enough to accommodate all aircraft types for both long-haul and short-haul flights. Once fully operational, the runway would enable at least 276,000 additional flights each year, increasing Heathrow's overall capacity to 756,000 flights annually.

Heathrow has conducted extensive design and planning work of potential layout options and runway alignments, locations and length. This length and location have been proposed after a decade worth of optioneering - balancing cost and demand, while minimising unnecessary negative impact to the local community.

A 3,500-metre runway allows all three runways to alternate between arrivals, departures and mixed mode while retaining full capacity. This flexibility is central to providing predictable periods of respite for communities affected by aircraft noise. This respite could only be delivered by a runway that allows for full operations. We will continue to discuss and analyse with airlines and other stakeholders whether a shorter runway of 3,100 metres could provide the same operational and noise benefits. A shortened runway would not impact the properties required to be purchased for the scheme.



The new runway would be located north-west of the existing airport, further away from densely populated parts of London and consistent with the location defined in the ANPS. Aircraft would land approximately 550 metres further along the new runway than on Heathrow's current runways, which means aircraft landing on the new runway would be flying at higher altitudes over residential areas, helping reduce noise exposure.

We have reconfirmed that the north-west location, which is consistent with Heathrow's previous scheme, is preferred and brings further advantages. The runway is further away from the communities that will be overflown when planes land from the east, over London (around 70% of the time), while flight paths to the west can be routed to avoid the most densely populated parts of Slough and Windsor. The layout avoids large-scale infrastructure such as the Queen Mary Reservoir and affects only the M25 corridor (improving traffic flows between the M25 and M4 corridors), avoiding disruption to the M4 and its junction with the M25.

New taxiway links would integrate the third runway into the existing network; these would be located to the west to reduce aircraft taxiing distances to the northern runway and limit impacts on local homes and businesses. Additional taxiways would support more efficient ground operations by relieving congestion and offering an alternative north-south taxiing route.

Our plan for expanding Heathrow has been designed to ensure operations across the airport continue to be safe, policy-compliant, and environmentally efficient. To meet regulatory safety standards, the new third runway would be positioned 1,035 metres north of the existing northern runway.

### WHAT ARE TAXIWAYS?

Taxiways act as the 'arteries' of the airport, enabling aircraft to move between areas for parking, refuelling and boarding passengers safely and efficiently.

## NEW TERMINAL BUILDINGS

Expanding Heathrow offers us the chance to continue improving the service we provide for passengers and airlines by reducing congestion, boosting punctuality and efficiency and providing premium facilities.

As part of our expansion plans, we would invest in building a new terminal complex to the west of Terminal 5, "T5X", consisting of a processing terminal and a satellite terminal, connected by an underground transit system. The processing terminal will be a major new 'walk-in' terminal with seamless connections to the existing Terminal 5, a new public transport interchange, multistorey car park and shopping facilities. The satellite terminal, "T5XN", will be linked via an underground system with multiple departure gates and a large area for passengers to relax. The new terminal complex would have capacity for additional passengers easing congestion and supporting an excellent passenger experience.

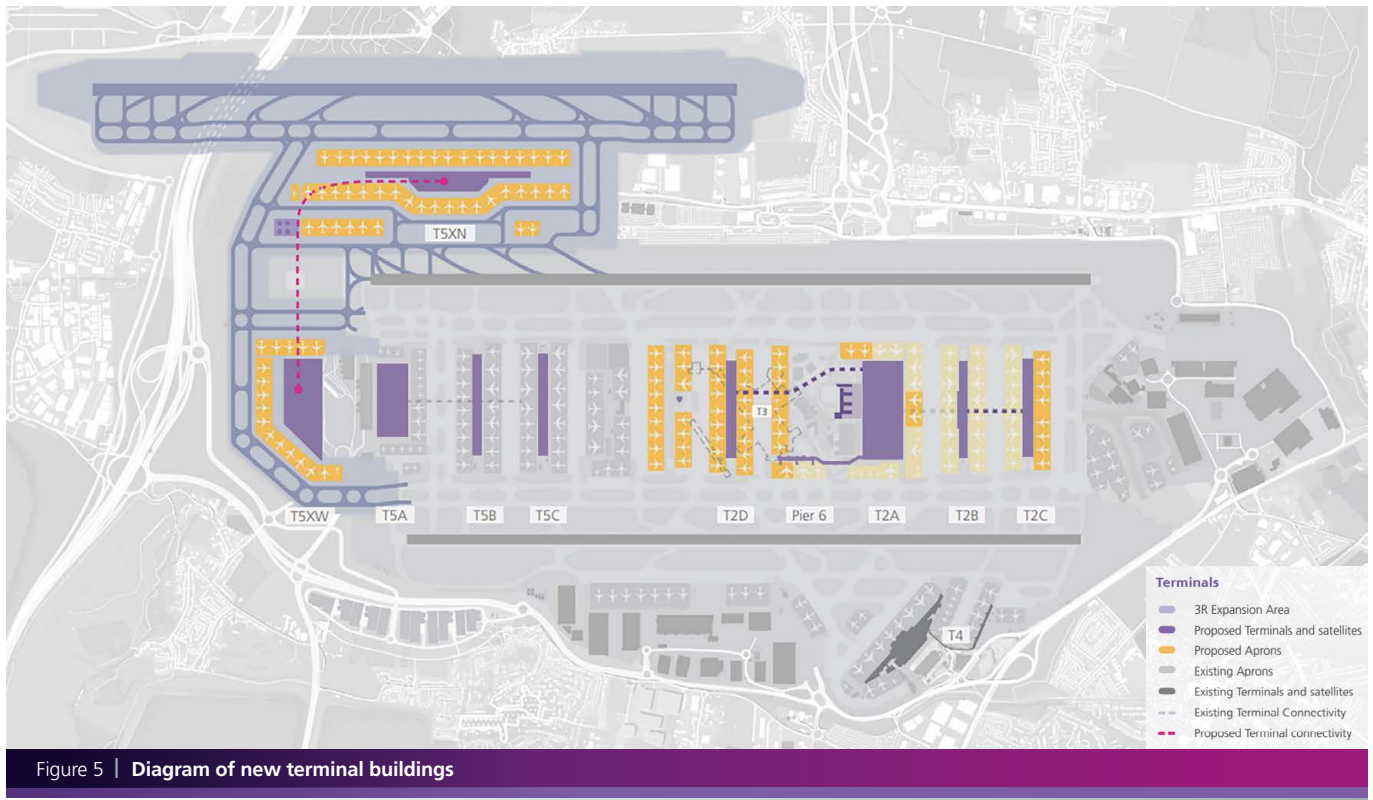
As part of our long-term masterplan to modernise Heathrow, we would upgrade ageing infrastructure across the airport campus by removing Terminal 3 (Heathrow's oldest terminal) extending Terminal 2 and redeveloping the Central Terminal Area.

Extending Terminal 2 would deliver tangible improvements to the passenger experience through an elevated, consistent offer across all terminals, while increasing terminal capacity and reducing walking distances. The removal of Terminal 3 would also create space for new retail, hospitality, and workspace offers designed to enhance the passenger experience.

Upgrading terminals would increase the space available for planes at terminal stands by 30%, enabling the accommodation of larger and more efficient aircraft types as the fleet modernises. The new layout also provides multiple taxiing paths and minimises congestion, reducing delays across the airfield.

The terminals will be built in line with Heathrow's sustainability and net zero commitments, with the construction materials and methods used focused on efficiency, minimising energy demand and maximising end-of-life disassembly and reuse.

And the specification of facilities will be delivered in consultation with airlines and under the review of CAA, just like every investment made by Heathrow.



## SUPPORTING AIRPORT FACILITIES

Expanding Heathrow also provides an opportunity to upgrade or rebuild critical facilities that support the smooth and successful running of the airport including cargo infrastructure, accommodation and parking systems. Existing cargo capacity will increase by 50% by building additional freight warehouses to the south of the airport – providing direct access to airside cargo handling and improved efficiency for logistics operators.

To reduce congestion and pressure on residential areas, a new truck park would be developed to the northwest of the A3133/ A3044 roundabout. This facility is intended to manage the flow of heavy goods vehicles serving the cargo operation, improving road safety and avoiding overnight HGV parking on local streets.

Subject to further consideration and analysis, two large parkway car parks could be developed: the Southern Parkway, with capacity for up to 16,000 vehicles, and the Northern Parkway, with up to 20,000 spaces. This plan could consolidate over 20 current car parks, into a few well-placed locations, placed near major junctions on the M4 and M25. This could support fast and efficient connections to each terminal campus via dedicated transport systems. These new parkways could also provide local communities with improved access to airport terminals and public transport links and help reduce congestion on local roads, a key requirement of the current ANPS.

## ROAD DIVERSIONS

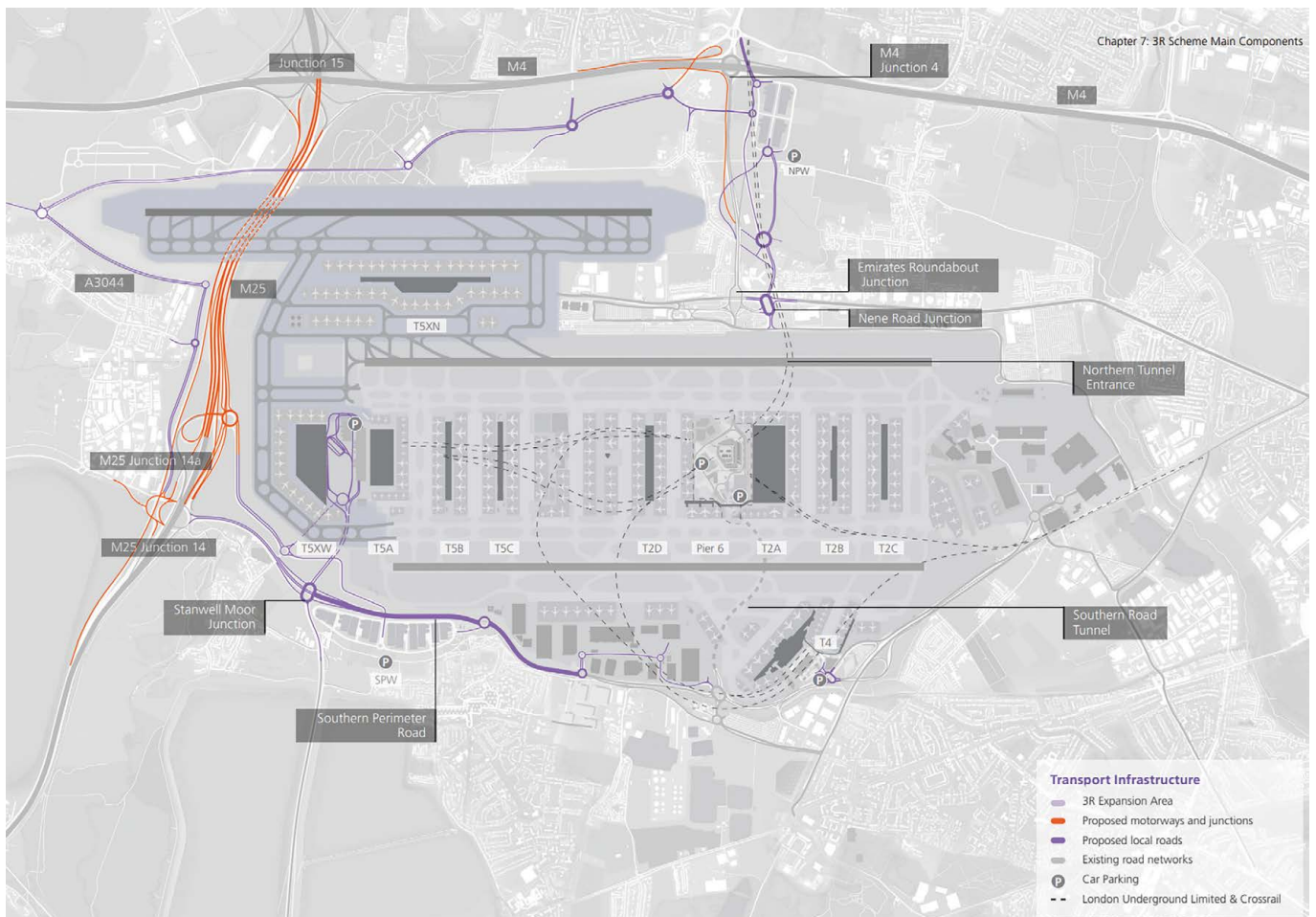


Figure 6 | M25 realignment

Major road diversions would be required to enable the airfield expansion and support surface access enhancements. These include realignments and reprovisioning of key infrastructure such as the M25, the A3044, the A4, the T5 spur road, Southern Perimeter Road, and several surrounding roundabouts and junctions. The new runway alignment intersects the existing M25 between Junctions 14 and 15. Following consultation and feedback from DfT, National Highways, the AA and the RAC, we are proposing to move the motorway approximately 130 metres westwards of the existing M25. To limit disruption and maintain traffic flows, the construction works would be undertaken away from the existing M25 before traffic is switched over to the new route.

#### HOW IT HAS BEEN DONE BEFORE: PREVIOUS MOTORWAYS RELOCATIONS – PARIS CHARLES DE GAULLE AIRPORT (CDG)

The A1 Autoroute, one of France's busiest roads, passes underneath two of CDG's runways and three parallel taxiways through a series of tunnels and taxiway bridges. The runways and taxiways span across three lanes in each direction of the A1, a single lane southbound collector distributor lane and Route de l'Arpenteur single carriageway road with one lane in each direction.

## PUBLIC TRANSPORT INFRASTRUCTURE AND ROAD LINKS

We would expand the Public Transport Interchange within the Central Terminal Area to improve access to public transport across the airport, ensuring that an increased number of passengers is matched by high-capacity, low-carbon travel options. The interchange will support new types of vehicles and routes and accommodate a wider range of public transport options so we can encourage passengers and colleagues to travel to the airport in a sustainable way.

As part of our plans to Modernise Heathrow, we would also build a new Southern Road Tunnel, linking the Southern Perimeter Road to the Central Terminal Area. This would provide an additional point of access to the Central Terminal Area, significantly improving resilience and enabling dedicated bus and coach services. Bus priority lanes in the new Southern Road Tunnel would unlock previously unviable services, particularly for communities south of the airport. These improvements would significantly increase speed, frequency and reliability for travel to Heathrow by bus.

Our planned investments include enhanced rail capacity; Heathrow is also exploring the option of promoting a new rail scheme that combines the objectives of the Western Rail Link to Heathrow and Southern Rail Access to Heathrow.



# PRIVATE INVESTMENT TO EXPAND HEATHROW

Expanding Heathrow is a nationally significant infrastructure project that will be 100% privately financed. No taxpayer money will be used to deliver a third runway, associated terminal upgrades or supporting airport infrastructure. Delivering expanding and modernising Heathrow will be the largest privately financed infrastructure project in Europe.

We are confident that our plan is both financeable and affordable and by investing £49bn, will bring benefits to people and businesses in every part of the UK. This builds on £15bn Heathrow has invested in the airport in the last 20 years to upgrade existing infrastructure, enhance passenger and airline experience, and improve resilience and sustainability. That investment, which laid the foundations for a third runway, together with our comprehensive expansion plans will ensure Heathrow remains globally competitive and the UK's Gateway to Growth into the future.

## REGULATORY CHANGE REQUIRED FOR DELIVERING AN EXPANDED HEATHROW

To deliver this project at speed, we have the right foundations in place, including a long track record of infrastructure investment and financial resilience. But considering the scale of the project and risk profile, expanding Heathrow requires a regulatory framework that enables large-scale, long-term capital investment, supports an A- rating and incentivises efficient delivery. The 'Regulatory Change' section of this proposal sets out what is required to create the right regulatory environment for the project.

This investment figure is not simply for building a runway in isolation but would deliver everything in our plan to make sure an expanded Heathrow works for all those who use and visit the airport, as well as the airport's neighbours. It represents the investment required for the runway, new terminal, upgrading existing infrastructure to provide a first-class experience for passengers and airlines, upgraded existing terminals, airport infrastructure, improved cargo capabilities, improved surface access to and from the airport and enhancements to support excellent service for our customers, both current and future.

*As plans progress, we will explore all potential levers to reduce scheme costs. The estimated costs can be disaggregated as follows (scheme costs are in 2024 prices.)*

## THE THIRD RUNWAY

The third runway is the most developed investment component within our plan, reflecting multiple design iterations, planning, consultation, environmental assessment, input from technical consultants and rigorous assurance.

This includes the investment required to obtain consent, procure the land, prepare the land including M25 realignment and expand the airfield with the runway, taxiways and associated airside infrastructure.

At this stage in planning, the investment estimate for this component is £21bn to build the runway. At the time of the forced 2020 pause, the overall cost estimate stood at £14bn. The increase is due to construction inflation which has also affected other major infrastructure projects and programmes. Heathrow will continue to look for targeted savings as our plans progress and we continue stakeholder engagement. Any delay would further add directly to the cost of expansion, through inflation and inefficiencies.

## ADDITIONAL TERMINAL CAPACITY ASSOCIATED WITH THE NEW RUNWAY

The associated additional terminal capacity is informed by design, consultation feedback and technical assurance. At this early stage ahead of submitting a planning application, we estimate this part of our plan would require investment of £12bn.

This includes the investment required to expand the airfield with aprons and stands connecting to the existing T5, construction of T5X and T5XN to support increased passengers, baggage systems, airside and landside infrastructure, car parks and connectivity enhancements.

## MODERNISING OUR INFRASTRUCTURE

Our plans include modernising our existing airport infrastructure to improve the UK's Gateway to Growth and are an investment of c.£15bn.

This represents a major upgrade to Terminal 2, with the delivery of two satellite piers, enabled by the phased closure of Terminal 3 and redevelopment of the Central Terminal Area.

## FOCUSING ON VALUE

We have been laser focused on value for money for our customers when developing our proposal. We have identified levers to enable savings including challenging terminal design specifications, drawing lessons from HS2 and Crossrail to improve supplier performance and delivery sequencing and working with the supply chain to 'design to budget.' These exercises will be taken forward in collaboration with airlines, passengers and local stakeholders as the programme progresses.

We will invest in expanding Heathrow sustainably and in line with our environmental commitments, providing excellent service that will keep us competitive, creating opportunity for passengers and airlines, and working closely throughout with our local communities. Our proposal includes accurate and realistic financial estimates for the current stage of the programme, informed by operational and environmental realities and a deep understanding of the delivery environment. Heathrow has already invested in early planning, stakeholder engagement and environmental assessment to strengthen our certainty about the level of investment required to deliver a plan for expansion that will create an airport that is fit for the future and in line with the Government's ambitions and our customers' expectations.

Expansion must be delivered safely within the live environment of an operational airport and requires detailed knowledge of Heathrow's systems, regulatory obligations, and the airport's ongoing maintenance, safety and security requirements. These considerations are embedded in our plan. We have a strong record of delivering infrastructure projects safely, on time and on budget. It is our detailed consultation, engagement and assessments that mean our plans, our investment - and together, the benefits they will bring - are realistic and genuinely deliverable.

Any alternative expansion options or standalone elements, such as a runway in isolation, would not possess the operational insight required to identify and accurately cost these factors.

Value has been central to our approach, from our engineering solutions and using existing space to increase capacity where possible, to taking a phased approach to modernising the airport (reflected in our investment to date in improving airport infrastructure and facilities).

However, there are numerous factors outside of Heathrow's direct control. London remains the most expensive city in the world for construction and the UK has the highest property tax in Europe. On top of this, Heathrow serves double the number passengers per m<sup>2</sup> of any comparable airport (as seen in fig.3) - this increases costs due to operational complexity of serving passengers across a small physical footprint. Heathrow brings opportunities too for our airline customers who are able to maximise the number of premium passengers and products at Heathrow. This means fewer passengers to spread the cost across, and more terminal space set aside for lounges as opposed to retail (retail revenue at Heathrow contributes to bringing down the passenger charge).

Value remains central to our approach, from our engineering solutions to use existing space to increase capacity where possible, to taking a phased approach to modernising the airport (reflected in our investment to date in improving airport infrastructure and facilities).

To secure value for passengers and the wider economy, a clear and early decision to proceed is essential. A timely decision by Government and an efficient planning process would realise the benefits of the programme sooner, deliver confidence to investors and give certainty to local communities sooner.



# A REALISTIC TIMELINE TO DELIVER

The timeline to delivery is ambitious but, we believe with the right Government support on policy and regulatory change, achievable.

To unlock delivery, Government will need to ensure that its planning, regulatory, surface access, fiscal and environmental frameworks are aligned to support the scale and complexity of the programme. This is critical to secure consent, mobilise private capital and deliver the economic and environmental benefits of expansion.

## PLANNING REQUIREMENTS

The Government has set ambitious targets to achieve development consent for expanding Heathrow by 2029 and has made clear that their objective is to enable to delivery of an operational third runway in a decade. To meet these timeframes, significant changes are required to the current planning regime, which we are discussing with Government and which, we believe, can be achieved with amendments to the Planning and Infrastructure Bill. These include streamlining the pre-application process by ensuring timely responses from statutory bodies and other consultees so that consent is achievable in 2029. It also requires streamlining the process so that the DCO is as much of a one-stop-shop for all other consents as possible. This will help get shovels in the ground as soon as possible and support the building of an operational third runway in a decade.

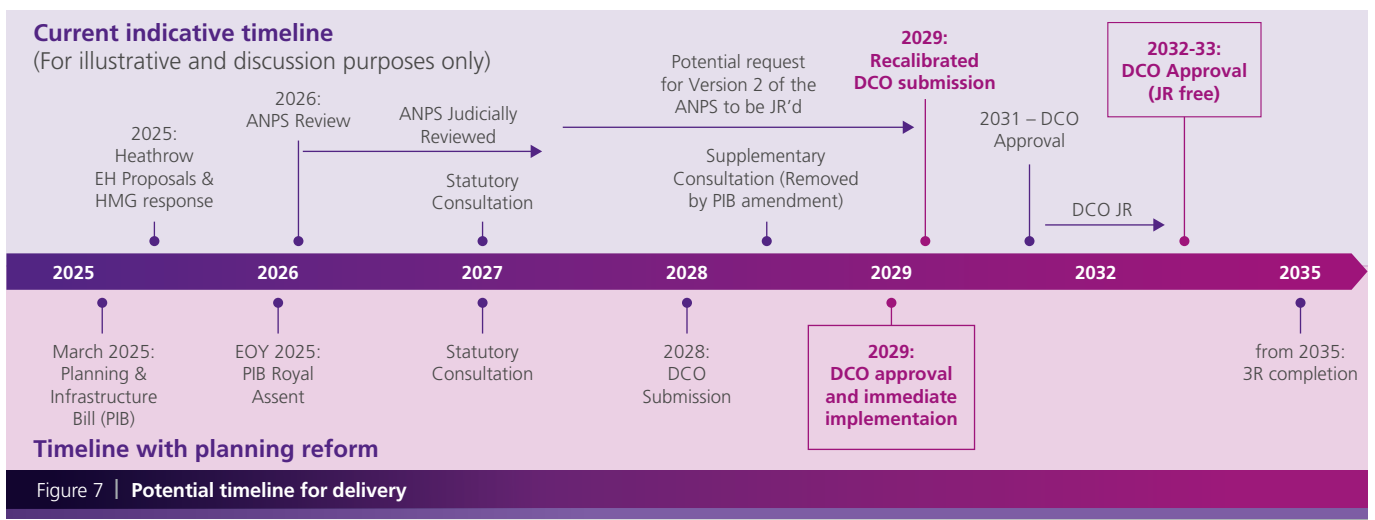
The long pre-application period and the current statutory engagement processes all create avoidable delay.

## AIRPORTS NATIONAL POLICY STATEMENT (ANPS)

The north-west runway scheme we are proposing is firmly rooted in the scheme outlined in the ANPS. This benefits from extensive review by Heathrow and by the Airports Commission between 2012 and 2015, significant further work undertaken by the Government to review the Airports Commission's recommendations and prepare the ANPS from 2015 to 2018, and detailed design, development and public consultation by Heathrow from 2017 to 2020. This work over a number of years has confirmed a north-west runway to be not only the best solution, but the only solution that can meet the Government's ambition of consent by 2029 and a third runway in a decade, given the amount of technical work and consultation that has already gone into the scheme.

The ANPS is current Government policy and continues to support a third runway.

The ANPS was, however, designated in 2018 and the Government has acknowledged the need for early review following submission of any proposal this summer. Heathrow supports a review and has requested the completion of that process by March 2026 at the latest, ready for public consultation and Parliamentary scrutiny and approval, to enable us to bring forward our proposals within a clear policy framework. Without these changes to the planning system and the conclusion of the ANPS review by March 2026, the Government's ambition to grant development consent in 2029 will be impossible to achieve.



## OTHER POLICY AND REGULATORY CHANGES

### REGULATORY CHANGE

Expanding Heathrow requires a regulatory environment that reflects the economic importance of unlocking new capacity at the UK's only hub airport.

The Government must ensure the Civil Aviation Authority (CAA) is guided by a clear mandate to prioritise growth and timely delivery, while respecting its regulatory independence. The framework must be capable of supporting the scale and complexity of expansion—unlocking efficient private investment and enabling the UK to deliver critical infrastructure at pace. Uncertainty in the regulatory framework can delay the development of expansion, stall investment decisions, and defer the realisation of consumer and economic benefits.

### AIRSPACE CHANGE

Airspace constraints are a limit on Heathrow's capacity. Modernising airspace in London and the South East is vital to accommodate additional flights to and from an expanded Heathrow and unlock capacity in the air, as the current airspace structure is outdated, fragmented and inefficient. The Government will need to commit to delivering the necessary reform of the process for approving changes in the sky at the same time as the process for consenting development on the ground at Heathrow, so that both processes can enable an operational third runway in a decade. Delay will remove the option of opening a third runway from 2035 and risks diminishing the economic value of the programme, limiting UK connectivity, and weakening the resilience of the aviation system.

### IN SUMMARY

We are ready to deliver Heathrow expansion and are committed to working with the Government to ensure the right conditions and framework are in place to unlock their growth ambitions. This framework is absolutely critical to our ability to deliver. The sooner we can get shovels in the ground, the sooner we can seize this once-in-a-generation opportunity to unleash Heathrow expansion's potential for the UK.

Our scheme would be the biggest privately financed infrastructure project in Europe and reflects decades of discussion and years of detailed planning. We are excited to bring forward these plans because we know they will deliver for the UK economy, and its businesses and people. With the policy framework needed to deliver at pace in place, we will be ready to implement this proposal driving investment and economic growth across the UK from this year.

# PART B WHAT AN EXPANDED HEATHROW WOULD DELIVER



“

*The Heathrow Business Coalition firmly supports the proposal for a third runway at Heathrow. As representatives of the airport's exporters, supply chain partners, and retailers, we have witnessed first-hand the advantages of a thriving, globally competitive hub. Expanding capacity at the UK's busiest airport is essential to keeping British businesses at the forefront of international trade."*

Heathrow Business Coalition Members





- EM East Midlands
- EE East of England
- NE North East
- NW North West
- NI Northern Ireland
- S Scotland
- SE South East
- SW South West
- W Wales
- WM West Midlands
- YH Yorkshire and the Humber
- L London

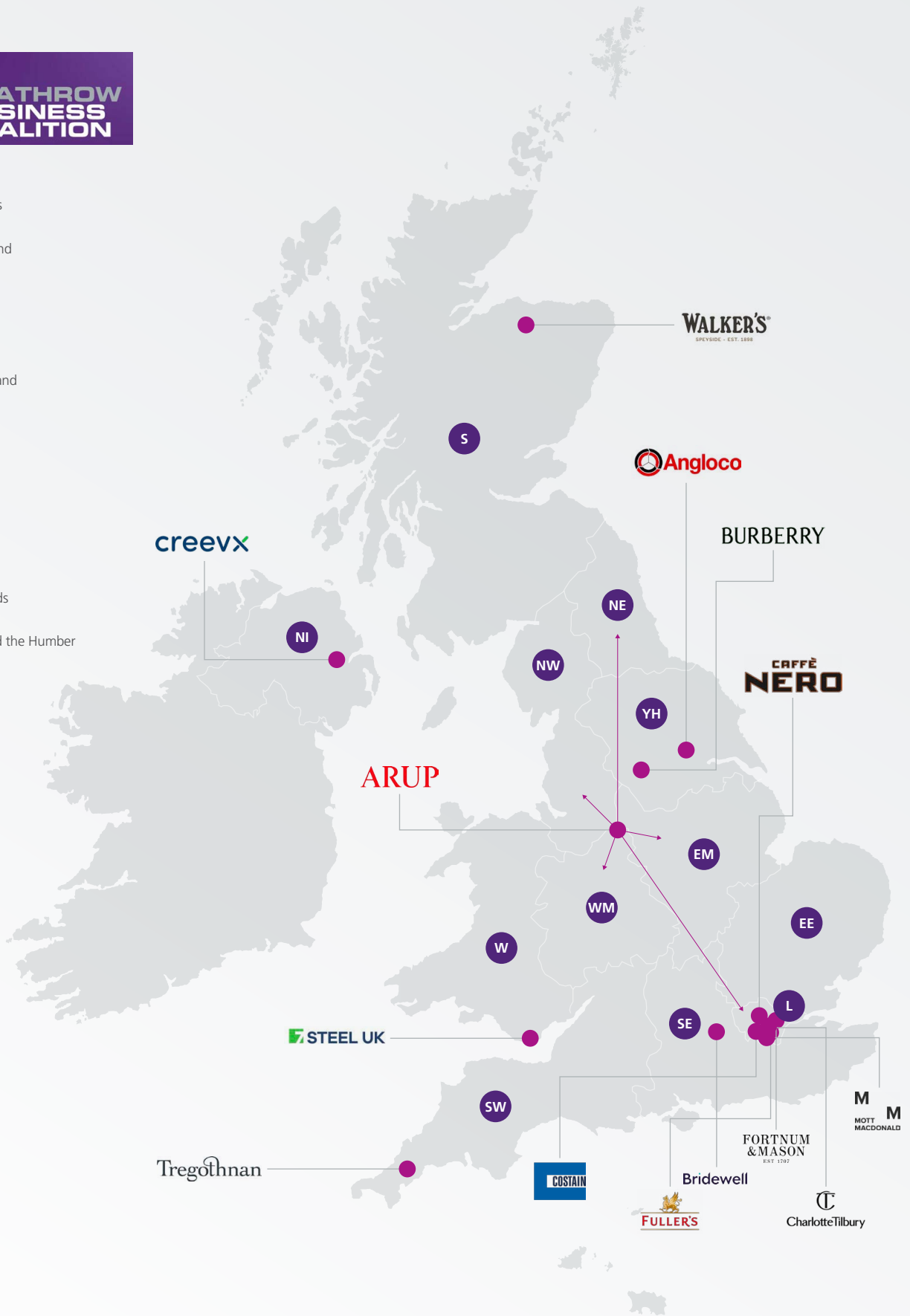


Figure 8 | Heathrow Business Coalition members

## WHAT AN EXPANDED HEATHROW WOULD DELIVER...



### 1. ECONOMIC GROWTH

Heathrow is the UK's largest port by value, helping businesses of all sizes trade over £200bn of goods each year, boosting the UK economy and connecting exporters to the world.

Starting this year, expanding Heathrow would add 0.43% to UK GDP by 2050, create thousands of jobs and enable even more businesses across the UK to access the global economy through Heathrow.<sup>3</sup>



### 2. OPPORTUNITIES FOR THE WHOLE OF THE UK

Every nation and region in the UK will benefit from expanding Heathrow. Increased capacity will deliver more supply chain opportunities, domestic connectivity, inward investment and inbound tourism in every part of the country.

60% of the economic benefit will be felt by communities outside London and the South East.



### 3. ON OUR ENVIRONMENTAL COMMITMENTS

A third runway at Heathrow is not a choice between economic growth and the environment; we will deliver for both.

We have made a clear commitment to reaching net zero by 2050 and have a plan to get there. Expanding Heathrow will go hand in hand with our environmental commitments on noise and air quality.



### 4. FOR LOCAL COMMUNITIES

Heathrow today provides significant direct and indirect employment opportunities, as the largest single-site employer in the UK with more than 80,000 people working at the airport. We are proud of the relationships we have built over many years with our local communities.

Expanding Heathrow would deliver local economic growth, jobs and skills to those living closest to the airport.

We are committed to listening and working with those most impacted by our expansion plans not only in addressing the impacts of construction and operations but ensuring the benefits of expansion are shared.

<sup>3</sup> Frontier Economics [heathrow-net-benefits-summary-29-01-2025-stc.pdf](#)



## 5. FOR PASSENGERS AND AIRLINES

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Expanding Heathrow will benefit passengers through more choice, more direct links to the world and lower air fares.

And airlines will benefit, with significant growth potential, including the opportunity to operate to more destinations and to carry more passengers. There is also opportunity for lower costs through reduced disruptions and increased efficiency.



## 6. VALUE FOR MONEY

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Expanding Heathrow will be 100% privately financed and no taxpayer money will be used to build a third runway or the associated infrastructure.

We have been laser focused on value for money for our customers when developing our plans. We will invest in building an expanded Heathrow sustainably, that provides excellent service and opportunity for passengers and airlines, with our local community in mind.



## DELIVERING ECONOMIC GROWTH

Heathrow plays a crucial role in delivering growth for the UK, boosting businesses nationwide, enabling skilled jobs and unlocking global trade. That is why businesses big and small, Chambers of Commerce in every nation and region of the UK, and Trade Unions back our plans for expanding Heathrow.

Expanding Heathrow would deliver economic growth through increased trade routes, facilitating inward investment and supporting new jobs.

Frontier Economics estimates that a third runway would deliver a 0.43% increase in the size of the UK economy by 2050 – with around 60% of this going to areas outside London and the South East.

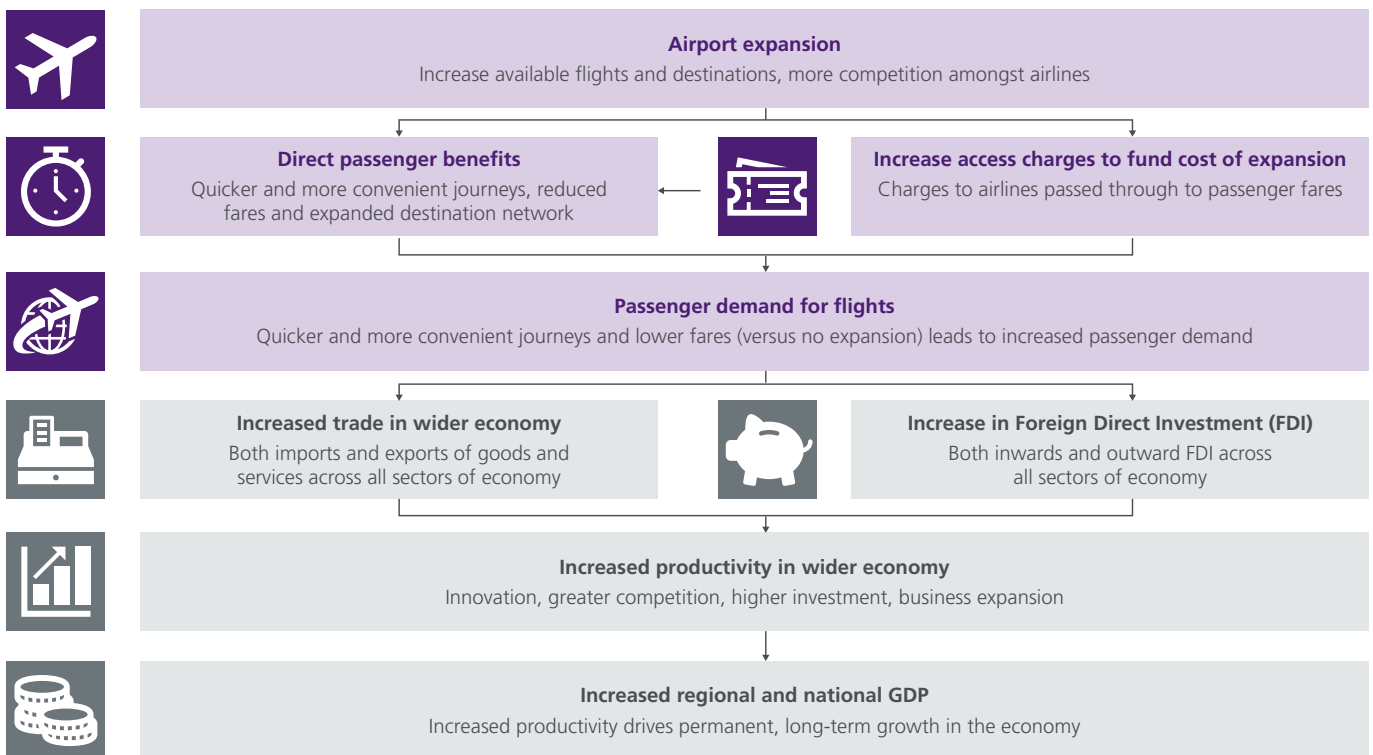


Figure 9 | How an expanded Heathrow will lead to lower ticket prices and benefits the UK economy

## ENABLING TRADE

As the UK's only hub airport, Heathrow's role in the country's economy is unique. We are the UK's largest port by value, connecting businesses with 230 destinations across over 85 nations and regions. With 92% of the world economy reachable within a single flight from Heathrow, we are proud to be the world's best-connected airport giving Heathrow's passengers unparalleled access to the world and UK businesses a competitive edge.

Over £200bn worth of goods (1.58 million tonnes in 2024) is processed through Heathrow every year, more than twice all other UK airports combined and surpassing major seaports, such as Felixstowe and Southampton combined with the Channel Tunnel.

Heathrow is therefore a critical infrastructure asset and a fundamental part of the UK's economic system, enabling trade that supports businesses and jobs in communities across the country. Our role as the UK's Gateway to Growth means businesses throughout the whole UK benefit from our domestic and international connections to reach global markets.

From British delicacies such as Cornish cream and Scottish salmon, to advanced manufacturing in the North East, Heathrow's connectivity enables exporters from across the country to access global marketplaces, find new customers and grow their business. Key growth sectors, as outlined by the Government's Industrial Strategy, such as financial services, advanced manufacturing, life sciences and creative industries all depend on fast and frequent access to global markets. Only air freight can facilitate the speed, security and specialised handling requirements that these sectors require. And the UK benefits from Heathrow's role in facilitating imports too, with aircraft arriving into Heathrow delivering critical hospital equipment and medicines used by doctors and nurses across the country as well as fresh produce like fruit and vegetables that line supermarket shelves.

### TOP EXPORTS BY TONNAGE



Industrial Machinery



Electrical Machinery



Salmon

### TOP IMPORTS BY TONNAGE



Vegetables and fruit



Organic Chemicals



Apparel and clothing accessories

### COLTRACO ULTRASONICS

Manufacturing advanced technology systems with their laboratory based in Durham, Coltraco Ultrasonics relies on Heathrow to rapidly transport its bespoke British technology to customers in over 120 countries worldwide. Coltraco Ultrasonics have used Heathrow's global connections to export worldwide for over 30 years, with exports making up 90% of their manufactured output.





### SCOTTISH SALMON

Scottish salmon is one of Heathrow's largest exports by tonnage, with 35% of all Scottish salmon exports by value, nearly £300m, exported through Heathrow. Scottish salmon is produced across the nation from over 200 farms, involving 3,600 supply chain businesses from every constituency in Scotland. Scottish salmon is increasingly popular in Asia but when exporting there is a need for speed to ensure freshness. Heathrow's direct connectivity therefore plays a crucial role, leveraging growth in Asian markets and helping Scottish salmon farmers win.

95% of air cargo from Heathrow is flown in the belly hold of passenger planes. It is a vital contributor to national and regional economies – particularly boosting the Midlands, Wales and the North East of England where proud manufacturing industries lie at the heart of economic growth.

But Heathrow's constrained capacity means economic activity is moving to airports outside the UK. Heathrow has been named the best connected airport by aviation analysts OAG when analysing the number of potential international connections within a six hour time frame. While Heathrow has more potential connections in this time frame, the number of destinations served is lower than other hub airports.

Istanbul Airport now serves over 300 routes, equating to 95% of the global economy, with Heathrow falling to 5th place in terms of global GDP connections. Expanding Heathrow would bring more of the economy within a direct flight from Heathrow and would increase the number of connections, helping Heathrow remain the most connected airport in the world. Airlines are being turned away due to the absence of available slots. High-growth routes such as those to secondary cities in China and India remain underserved and some high growth countries such as Peru, Philippines, and Indonesia are not served at all by direct flights from the UK.

International trade, investment and tourism are increasingly being channelled through foreign airports. For UK regions, the loss of domestic connectivity to the UK's only hub airport means reduced long-haul access for regions through the UK, constraining export growth and weakening business reach. These losses will be permanent unless additional capacity is delivered at the UK's hub airport.

#### NEW DIRECT ROUTES WOULD BRING MORE OF THE WORLD'S ECONOMY WITHIN REACH OF A SINGLE FLIGHT FROM HEATHROW



Indonesia

**1.3%**



Argentina

**0.6%**



Philippines

**0.4%**

The percentages represent the country's proportion of the world's GDP

As the only hub airport of a proud trading nation, and with the Government negotiating and signing new trade agreements, Heathrow is the perfect partner for UK exporters to embrace emerging opportunities.

## HOW HEATHROW SUPPORTS THE UK'S FREE TRADE AGREEMENTS

### India



Flights at Heathrow transport 86% of the UK's air cargo exports to India with three unique routes between the UK and India. Independent fire extinguisher manufacturing company, Britannia Fire, based in Norfolk uses Heathrow's connectivity with India to export their products.



### China



A recent Frontier Economics study has found that the regular direct connections between Heathrow and China contribute around £530 million to UK GDP per year.



### USA



Heathrow has over 100 flights a day to the USA, with 31 different route offerings, bringing tourists who have a net impact of almost £1 billion per year on the UK economy. Heathrow is the only UK airport to offer over 15 unique routes to the USA, and is the only European hub to offer connectivity to Nashville, Baltimore, Pittsburgh and New Orleans. Cornwall-based Tregothnan Tea has enjoyed transatlantic success due to Heathrow routes to Austin, New York, and Los Angeles. This has enabled same day export of 2.3 tonnes of tea to the U.S, just this year.

### Japan



Heathrow is responsible for transporting half of the UK's exports to Japan. Radnor Preserves of Newton, Wales, flies their award-winning artisan marmalades to Japan, as featured in Tokyo's British Fair. Adding just one additional direct flight from Heathrow to Japan could deliver up to an extra £20 million to the economy and create around 320 jobs.



Expanding Heathrow will deliver new long-haul routes to growing economies and increase cargo capacity by 50%, expanding trading opportunities for businesses of all sizes.

## DELIVERING FOR CAREERS, SKILLS AND JOBS

### JOBS AND SUPPLY CHAIN

In addition to the more than 80,000 people employed at the airport, in 2024, we invested over £1.1bn in our supply chain and worked with 1,100+ business. We are proud that 60% of our suppliers are SMEs. From Chisholm and Winch, a construction firm based in the East of England which has worked on site at Heathrow for more than three decades to Zaun, a specialist fence manufacturer based in Wolverhampton, we work with businesses across the UK to foster a thriving supply chain.



*We at Community Union are proud to support a third runway at Heathrow. This project promises to create thousands of quality jobs, both during construction and in the long term, which will provide significant economic benefits to our members and their families. Heathrow's signing of the UK Steel Charter earlier in the year demonstrates their commitment to a prosperous and thriving UK supply chain, creating economic growth and jobs across the UK"*

**Alasdair McDiarmid, Assistant General Secretary, Community**

Expanding Heathrow would mean more jobs, more tourism, more suppliers and more economic benefits to be felt both in the local community and across the UK. As soon as the Government approves the project, hundreds of millions of pounds would begin flowing into the UK economy as new contracts are awarded for design and planning; this will become billions if we receive planning permission and get spades in the ground. The construction and operation of an expanded Heathrow is a once-in-a-generation opportunity to support employment, skills and supply chain development. It will leave a legacy which grows key industries, helps SMEs to prosper and creates long-term careers for people from every part of the UK.



### INDIRECT EMPLOYMENT – GDP BENEFITS

GDP benefits are expected to rise across all sectors of the economy as a result of expanding Heathrow, with the largest contributions coming from industries that are central to the Government's growth agenda. These include key sectors from the Industrial Strategy such as advanced manufacturing, life sciences, creative industries, and financial and professional services. Over half of the UK's pharmaceutical exports and nearly half of all scientific instruments were shipped via Heathrow in 2019. These high-value sectors depend on Heathrow's international connectivity to compete globally. Their continued growth will drive wider gains across the economy, as demand for goods, services and skills spreads across UK supply chains.

This will generate new opportunities for high-skilled employment across both service and manufacturing industries, while also supporting jobs in more traditional sectors. The nature of Heathrow expansion's impact means that these will be productivity-led gains, which support higher wages and household incomes over time.

### IN SUMMARY

The economic potential of expanding Heathrow is clear – in additional tax revenue, foreign direct investment, jobs and wider economic benefits. And crucially, the third runway would be 100% privately financed, but taxpayers will feel the benefits in increased GDP, new jobs and lower air fares.

Expansion means investing in Heathrow's future, and in the UK's future too. Heathrow is more than an airport – we are the UK's Gateway to Growth – and growing the airport means delivering economic benefits that will be felt from our doorstep to households in every corner of the country.

# DELIVERING OPPORTUNITIES FOR THE WHOLE OF THE UK

As the UK's Gateway to Growth, Heathrow is already delivering for the whole country and we are clear that expanding Heathrow must bring benefits to every nation and region. The economic benefits from the third runway will be felt from our home in Hillingdon to Hull, Holyhead, Helens Bay and the Highlands.



Just some of the Chambers of Commerce across the UK that support an expanded Heathrow

## DELIVERING FOR BUSINESSES AND JOBS ACROSS THE COUNTRY

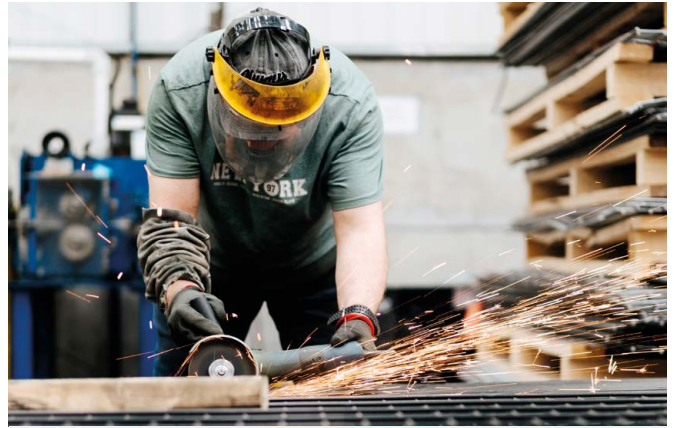
Businesses across the nations and regions, from sole traders to large multinationals, already rely on Heathrow's network to export their goods and services all over the world – from Prima Cheese in the North East to Premier Packaging Solutions in Northern Ireland to Stratton Tea in the North West.

Of the 1,100 businesses in our direct supply chain, 60% are SMEs, supporting 16,000 jobs across the UK.<sup>4</sup> We have a long track record of supporting SMEs to successfully bid for work at Heathrow, both locally and from across the country, through initiatives like our Business Summit, World of Opportunity small business grants, SME Academy and 'Compete 4' events. Our SME suppliers range from local company Chargebox, based in Chiswick, manufacturing secure mobile device charging solutions, to Zaun, specialist fence manufacturer based in Wolverhampton.

Once international connectivity improves further from an expanded Heathrow, businesses across the country will gain better access to suppliers, clients and global markets, driving regional productivity and long-term income growth.

A third runway at Heathrow will require a number of construction projects to take place at the same time as well as an extensive supply chain and a large labour force.

By continuing to engage with the business community, Heathrow will be able to re-assess how modern construction methods – including the use of Logistics Hubs – could support the construction phase and deliver economic benefits across the UK, enhance productivity and efficiency, address skills shortages, and provide value to all our customers.



### ZAUN, WOLVERHAMPTON

Zaun is the only in-house British manufacturer of woven and welded mesh fencing systems. Located in the West Midlands, Zaun has been innovating and decarbonising physical perimeter security fencing and gate systems that are deployed at Heathrow.



<sup>4</sup> Bradshaw

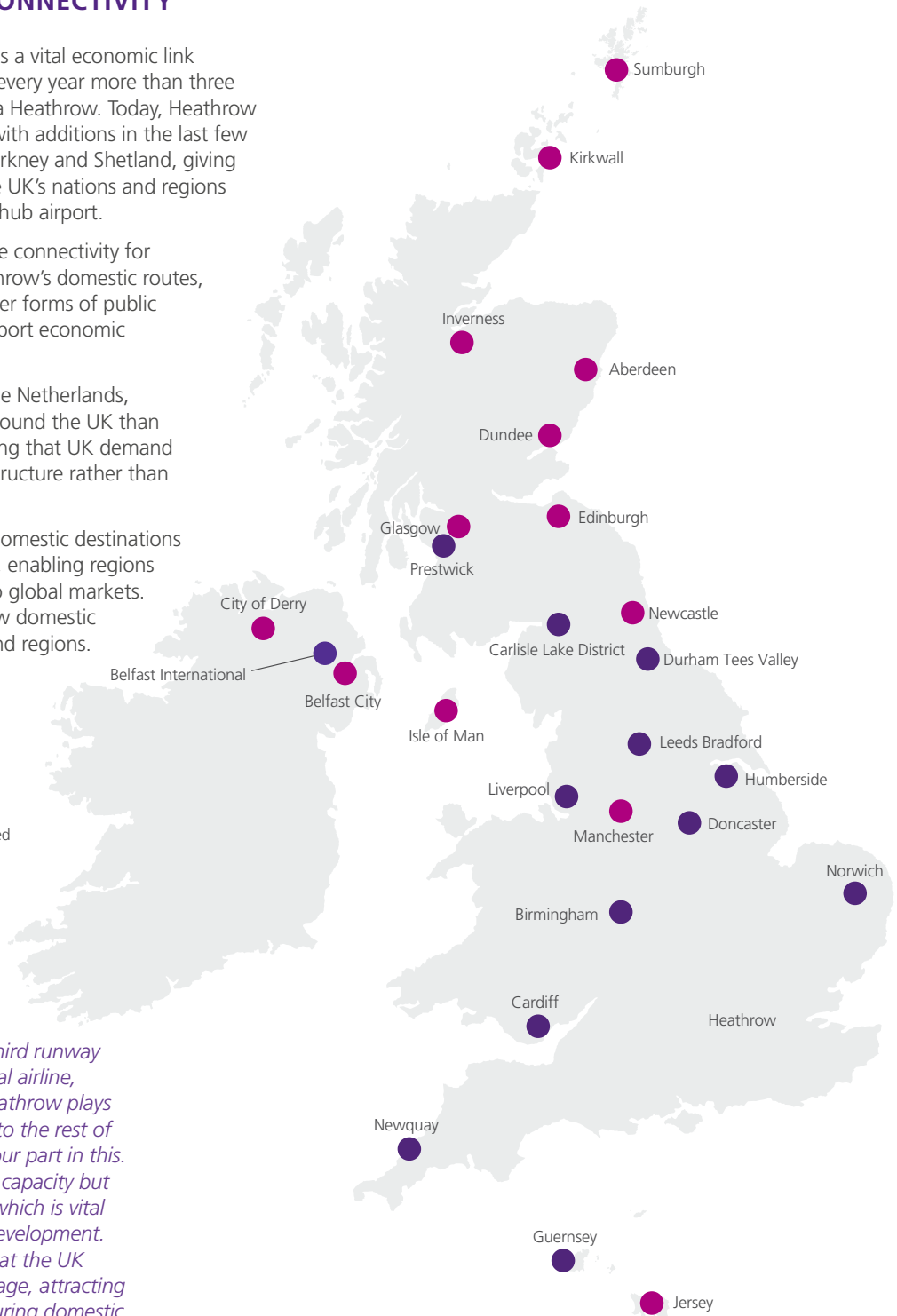
## DELIVERING REGIONAL CONNECTIVITY

Heathrow's domestic route network is a vital economic link for the UK regions and nations; and every year more than three million domestic passengers travel via Heathrow. Today, Heathrow directly connects to 13 UK airports, with additions in the last few years to the City of Derry, Dundee, Orkney and Shetland, giving businesses and passengers across the UK's nations and regions access to the world via the country's hub airport.

Domestic connectivity provides lifeline connectivity for hard-to-reach communities. Of Heathrow's domestic routes, nearly half are over water, where other forms of public transport would not be viable to support economic growth ambitions.

Amsterdam Schiphol, an airport in the Netherlands, has greater connectivity to regions around the UK than the country's own hub airport meaning that UK demand to travel is sustaining overseas infrastructure rather than contributing to domestic growth.

With more capacity, the number of domestic destinations served from Heathrow could expand, enabling regions and nations to have greater access to global markets. Expansion could unlock routes to new domestic destinations across the UK nations and regions.



- Heathrow's **current** domestic routes served
- Heathrow's **potential** new air routes



*Loganair fully supports Heathrow's third runway proposal. As the UK's leading regional airline, we recognise the critical role that Heathrow plays in connecting the regions of the UK to the rest of the world, and we're proud to play our part in this. The expansion will not only enhance capacity but also improve domestic connectivity, which is vital for economic growth and regional development. A third runway will help to ensure that the UK remains competitive on the global stage, attracting business and visitors alike whilst ensuring domestic routes continue to thrive."*

**Luke Farajallah, Chief Executive Officer at Loganair**

Figure 10 | Existing domestic routes operating at Heathrow vs potential new domestic routes

### WHAT CORNWALL CHAMBER OF COMMERCE MEMBERS THINK OF THE CORNWALL-LONDON AIR ROUTE:

80% members say the air link is 'extremely or very important' to their business. 50% of members would rank Heathrow as the preferred London airport Cornwall connects to.



*Cornwall Airport Newquay supports infrastructure development that enables true regional connectivity. The proposed third runway at Heathrow has the potential to deliver meaningful hub access for regions like Cornwall - but only if there is a clear and sustained commitment to slot accessibility and affordability for regional carriers and regional routes. Direct and reliable connectivity to a UK hub is vital for Cornwall's economy, inward investment, and the future of sustainable regional aviation."*

**Amy Smith, Managing Director (Interim),  
Cornwall Airport Newquay**

### FROM INVERNESS CHAMBER OF COMMERCE

Initially announced in January 2023, the Inverness and Cromarty Firth Green Freeport is projected to attract £3 billion worth of investment. Substantial investments have already been secured, including £350m from Japanese firm Sumitomo Electric. The Heathrow-Inverness route is supporting this inward investment through providing reliable connectivity into the UK's only hub airport.



*The new Inverness and Cromarty Firth Green Freeport is projected to create 11,300 jobs in the Highlands. The Freeport will create a hub for sustainable economic activity, and improved connectivity to Heathrow will be vital in maximising its success – ensuring we can continue to attract skilled workers to the area. Beyond that, for Inverness, this means better connections for our whisky and seafood industries, tourism sector, and other local enterprises, making it easier to attract international visitors and investors."*

**Colin Marr, Chief Executive, Inverness Chamber of Commerce**

Not only could expanding Heathrow deliver more domestic routes, it could also ensure domestic routes operate at least one roundtrip at the beginning and the end of the operational day, while complying with night flight restrictions, so connecting onto long-haul routes is possible. For example, this means a long-haul business passenger from Asia could land at Heathrow in the early morning, transfer onto a domestic departure and land in Inverness, Newcastle or Belfast before the business day starts. Transfer rates on domestic routes are some of the highest of all Heathrow routes, with nearly half of all passengers on Heathrow's seven Scottish routes transferring from or to other Heathrow services. Passengers are choosing 'the right mode for the right journey' conveniently connecting from long-haul departures and arrivals to travel onwards to more parts of the UK. This is a unique feature of Heathrow helping to deliver trade, inward investment and tourism to the nations and regions.



## DELIVERING REGIONAL GROWTH

A third runway could increase the UK's potential GDP by 0.43% by 2050 but crucially, over half – around 60% – of that economic boost would be felt by areas outside London and the South East.<sup>5</sup> Expanding Heathrow would see those benefits rise in the future, spreading GDP benefits across all regions and nations of the UK.

## THE BENEFITS FOR SCOTLAND



*The Scottish business community endorses the development of a third runway at Heathrow, recognising it as a critical infrastructure investment with significant economic opportunities. This expansion will not only enhance Scotland's connectivity to key international markets but also strengthen the UK's position as a global trading hub. By facilitating greater trading access to emerging and established economies, we are empowering Scottish businesses to scale, export, and compete on the world stage, while driving inclusive economic growth across the country."*

**Scottish Chambers of Commerce & FSB Scotland**

Expansion is backed by UK airports such as Newcastle, Aberdeen, Leeds-Bradford, Liverpool and Glasgow, and Chambers of Commerce from Kent to South Wales to Inverness, and retailers operating at the airport as well as right across the country.



<sup>5</sup> Frontier Economics

## IN SUMMARY

Heathrow is more than an airport, and a third runway is more than a strip of tarmac in London – it is a Gateway to Growth for every nation and region of the UK.



Figure 11 | Some of the businesses who support an expanded Heathrow

# DELIVERING ON OUR ENVIRONMENTAL COMMITMENTS

Growth in air travel must go hand in hand with a transition to net zero emissions. Expansion and net zero are not competing goals. A third runway at Heathrow is not a choice between economic growth and the environment – we will deliver for both.

Air travel connects families, supports jobs, drives trade and underpins the UK’s global competitiveness. It is clear that demand for flying is enduring with airports across the world expanding operations. With Heathrow’s commitment to reaching net zero in the air and on the ground by 2050, we will continue to take a leadership role in reaching our environmental commitments while servicing this demand.

Heathrow’s net zero target is achievable within both the airport’s current operations and our plans for expanding Heathrow with an increased number of flights in the future. Leading climate and aviation experts, including the International Civil Aviation Organization and the UK Climate Change Committee, agree that net zero flying by 2050 is achievable, even with future growth in passenger numbers.

With capacity constraints at Heathrow, demand for air travel from across the UK is already being served by hub airports in Europe and the Middle East. This economic cost comes with no environmental gain, as the carbon emissions simply occur elsewhere – outside our sphere of influence. Heathrow’s strong track record on other critical environmental challenges, such as local air quality and noise, along with our industry-leading work to decarbonise aviation and build a sustainable travel network show that we are serious about our net zero commitment.

## PROGRESS SINCE 2019, SHOWING HEATHROW’S ABILITY TO DELIVER ON SUSTAINABILITY WHILE MEETING GROWING DEMAND

**10%** Reduced emissions from flights by around 10%

**31%** Achieved a 31% reduction in NO<sub>2</sub> emissions

**5%** Increased public transport mode share by 5%

**86%** Incentivised airlines to increase the use of aircraft that are compliant with the latest, quietest noise standard, from 65% of aircraft in 2019 to 86% in 2024

**3%** Incentivising the use of Sustainable Aviation Fuel at the airport of up to 3% in 2025, well above the Government mandate

Expanding Heathrow provides the opportunity to go further. Expansion will unlock private investment that supports progress on our sustainability goals, demonstrating that growth and environmental leadership are not mutually exclusive.



## DELIVERING NET ZERO

Heathrow has reduced emissions in the air by approximately 10% from 2019 to 2025, outperforming the UK Climate Change Committee's 6% target from its Sixth Carbon Budget. Expansion will be aligned with Heathrow's Net Zero Plan, published in 2022 and aligned with the UK's Jet Zero Strategy. Our expanding Heathrow plan includes the additional flight capacity from a third runway from 2035 and confirms our commitment to reach net zero by 2050.

### Four levers support net zero "in the air":

- 1 operating more efficiently – modernising fleets with cleaner aircraft and engines and airspace reform to enable more direct and efficient fleet modernisation
- 2 Sustainable Aviation Fuel (SAF) scale-up through financial incentives and the right policies from Government
- 3 zero-emissions hydrogen aircraft, likely initially on small aircraft and shorter routes
- 4 high quality durable removal of any residual emissions, through natural solutions like peatland restoration and engineered solutions like carbon capture and storage.

"Non-CO<sub>2</sub>" effects from aviation also contribute to climate change. Although scientific understanding of the precise impact and appropriate mitigation strategies is still developing, Heathrow is committed to contributing to research to understand this issue.

## SUSTAINABLE AVIATION FUEL

Transitioning the aviation industry to SAF is projected to account for around 40% of total carbon reductions by 2050. Heathrow is already leading the way in its use with our pioneering incentive scheme which makes SAF more affordable for airlines by halving the price gap with conventional jet fuel. The scheme has been oversubscribed by airlines since its inception. Heathrow is now using more SAF than ever before; in 2024, 17% of SAF produced globally was used at Heathrow.

### WHAT IS SAF?

Sustainable Aviation Fuel (SAF) is an airplane fuel alternative designed to cut lifecycle carbon emissions. It is almost chemically identical to traditional jet fuel and so directly replaces fossil fuel. It can be made from a variety of sources, including different types of waste, and by combining hydrogen with captured carbon. The biggest single contribution that will help us get to Net Zero is changing airline fuel to SAF – it is projected to account for around 40% of the total carbon reductions by 2050. Heathrow's scheme aims for 3% SAF use in 2025, equivalent to 187,000 tonnes and 1% above the Government's mandate.



*The LHR Incentive Programme will support the SAF market's increasing momentum, allowing airlines like Emirates to take advantage of its availability and make it more commercially viable."*

*Adel Al Redha, Deputy President and Chief Operations Officer, Emirates Airline.*



The graphic below shows Heathrow's projection of carbon in the air to 2050, from our Net Zero Plan published in 2022. We will be updating that plan over the next year to provide our latest view on the transition to net zero. As part of our Development Consent Order application, we will provide a detailed assessment of future carbon emissions and how we can deliver a new runway within the UK's climate change obligations.

This will require action and investment by Heathrow, our airline customers and the wider aviation sector. It will also require the right Government policies, particularly to scale SAF and Greenhouse Gas Removals at the pace required.

**For carbon "on the ground" we will decarbonise surface access by continuing to increase our public transport mode share and by providing the right infrastructure for electric vehicle charging. We will also set ambitious standards for low-carbon construction and work with industry partners to accelerate action.**

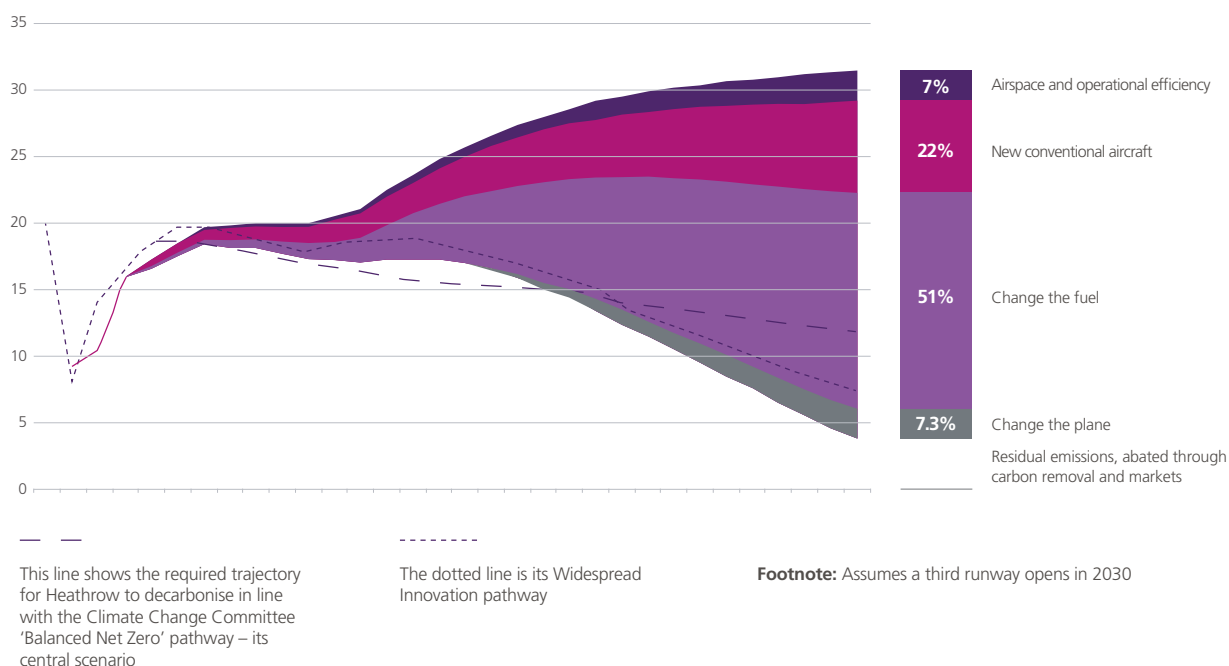


Figure 12 | Pathway to decarbonise aviation in the air

## EXPANDING SURFACE ACCESS

Coach, bus and rail connectivity ensures that people from right across the country are able to access flights from Heathrow by public transport, which plays a central role in reducing Heathrow's emissions on the ground. Heathrow now has one of the highest public transport mode shares of any UK airport, with over 45% of passengers using public transport to travel to the airport in 2024 (from [Heathrow Profiler Survey](#)).

Progress on mode share has been driven by multiple initiatives including the introduction and subsequent increase of the Terminal Drop-Off Charge (TDOC) and implementation of our Sustainable Travel Zone (STZ). The STZ incentivises the use of bus and coach travel through subsidised travel routes alongside prioritising active travel infrastructure in collaboration with local authorities. These efforts are supported by wider measures including the full opening of the Elizabeth line and the expansion of TfL's Ultra Low Emission Zone (ULEZ) to Heathrow.

If expansion proceeds, Heathrow's ambition is to enable 40 million more passengers per year to travel by public transport compared to today. This will require building on what has been achieved to date while integrating new infrastructure, behaviour change programmes, and demand management.

Heathrow's multi-modal Surface Access Strategy will deliver a sustainable, resilient and affordable transport network to reduce reliance on private vehicles, increase zero-emission options, and improve access for underserved communities. Our plans for expanding Heathrow include privately investing in bus and coach services and active travel infrastructure and working together with partners to increase new rail connectivity.

Accountability for delivery will be maintained through the Heathrow Area Transport Forum, which provides independent scrutiny of our surface access plans to ensure transparency and effective progress.

## BUS AND COACH CONNECTIVITY

The airport is home to the busiest bus and coach station in the UK. Currently, over 3.5 million of Heathrow's passengers travel to the airport each year by an extensive bus and coach network, covering a large part of the South-East of England and beyond - from our doorstep in Hillingdon to Penzance and Great Yarmouth.

We recognise the importance of regular and reliable bus and coach routes to provide affordable connections to the airport for passengers and colleagues. Over 30 bus and coach routes have been introduced or enhanced by Heathrow since 2022, 80% of which operate during early morning and late-night hours, supporting shift workers and wider public use.



## MAP OF COACH CONNECTIVITY FROM HEATHROW

Expanding Heathrow would mean further investment in bus and coach connectivity. A new and enlarged Public Transport Interchange will be delivered in the Central Terminal Area with additional public transport facilities also in the new expanded Western Campus (T5X).

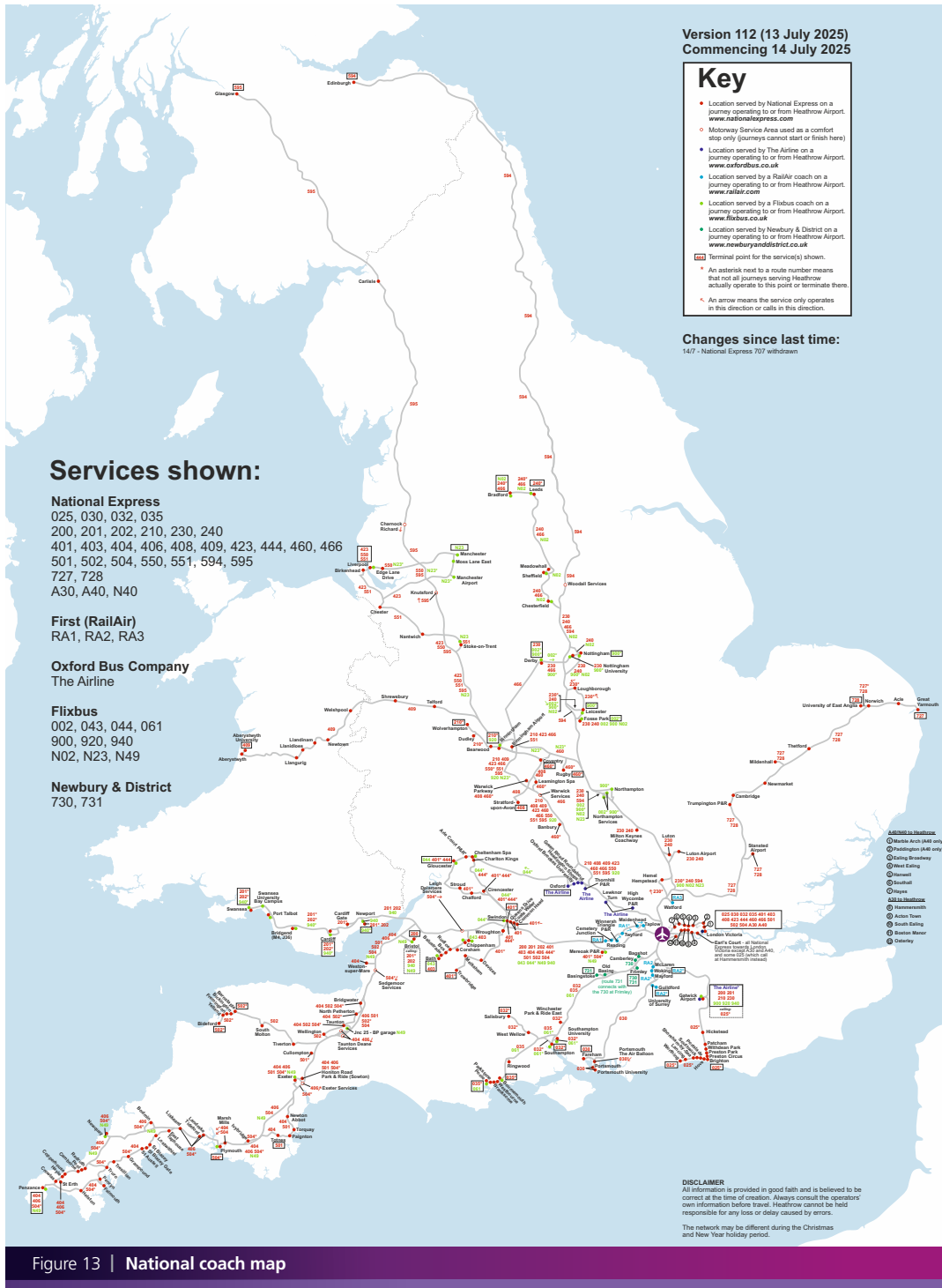


Figure 13 | National coach map

### INCREASED RAIL CONNECTIVITY

Increasing public transport mode share targets is not possible through bus and coach alone. Heathrow is already well served by rail and underground links to Central London through the Heathrow Express, Elizabeth line, and Piccadilly line but our plan is to build connectivity to underserved areas. Heavy rail capacity must be expanded to provide an attractive public transport alternative to access Heathrow at scale.

Heathrow is exploring the option of promoting a new rail scheme that combines the objectives of a Western Rail Link to Heathrow and Southern Rail Access to Heathrow. A Western link would unlock access from the West of England and South Wales, while Southern Rail Access would facilitate rail connectivity from South London and the surrounding counties.

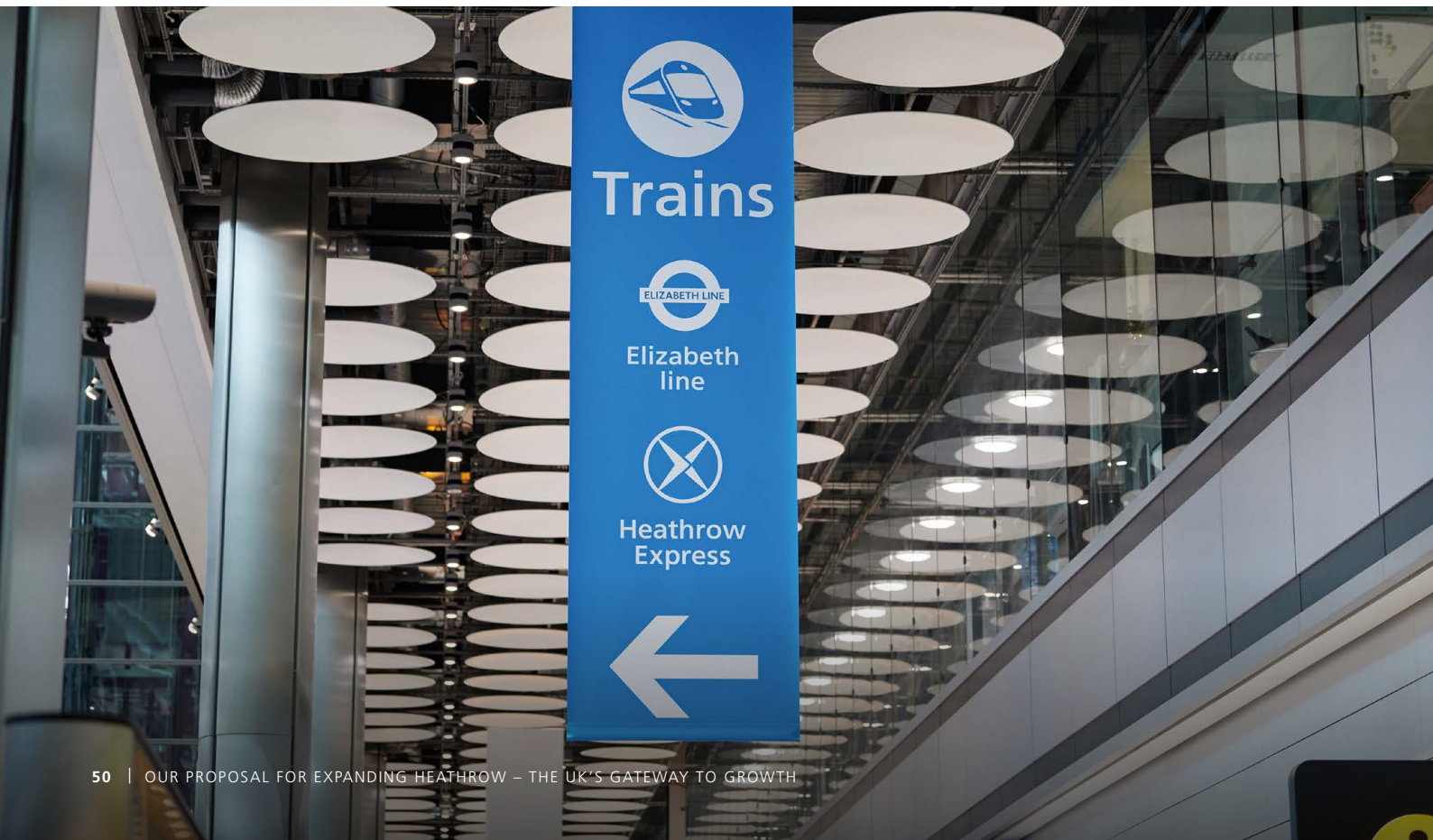
Future rail schemes connecting Heathrow would generate wider economic and connectivity benefits for the UK, so a shared vision with the Government on rail and agreement on the appropriate mechanism for funding these investments is vital.

### IN SUMMARY

There is a robust planning process for a third runway; and our plan for expansion demonstrates to the Government that we can meet legal limits on carbon, air quality and noise. The ANPS requires us to show that expansion would not undermine the ability of the Government to meet its carbon reduction targets - which focus on delivering net zero by 2050 at the latest, in line with our own commitment. We will meet that requirement, as economic growth cannot come at the expense of the environment.

The aviation sector needs a combination of ongoing commitment from airports and airlines, direct investment in new technologies and continued policy support from the Government to reach net zero by 2050.

With the appropriate support, expansion can unlock not just capacity but also green growth opportunities in construction, fuels, clean transport and in helping to scale a high-quality domestic carbon removal sector. Expanding Heathrow would create the opportunity for the Government and Heathrow to redefine the blueprint globally for how aviation, infrastructure and climate leadership can go together.



# DELIVERING RESPONSIBLY FOR OUR LOCAL COMMUNITY

Our local communities are critical to the success of Heathrow and we take our responsibilities to local residents seriously. We acknowledge that living next to an airport impacts our neighbours, and we are proud of the steps we have taken over many decades to ensure we are a responsible neighbour.

We are the largest single-site employer in all the UK, with over 80,000 people working at the airport, and almost 16,000 more jobs supported in our supply chain across the country. Over 35,000 people working at Heathrow live in our nine local boroughs. From frontline roles like Security Officers and Airside Operations ensuring the safety of every passenger and aircraft, to behind the scenes logistics, to supply chain partners innovating new technologies – the airport is made up of an ecosystem of careers.



## PARTNERSHIPS WITH OUR LOCAL COMMUNITIES

The Heathrow Local Growth Taskforce, a shared initiative with local authorities chaired by Lord Blunkett, aims to drive local economic growth by focusing on sustainable practices, supporting local businesses, and creating opportunities for the community, with a focus on skills and employment.

In 2024, we celebrated 20 years of the Heathrow Employment and Skills Academy, which provides free support, advice and recruitment services to job seekers and young people about working at the UK's only hub airport. Since opening its doors, more than 10,000 job offers and apprenticeships have been secured through the Academy to local people.

Heathrow's World of Work programme also inspires young people in the local community to pilot their careers, and we offer two types of apprenticeship opportunities with Heathrow: the Heathrow Engineering Scheme and the Supply Chain Shared Apprenticeship Scheme in construction and infrastructure. We have invested substantially in these two programmes, pledging to train 500 local apprentices by 2030.

Heathrow invests in local community programmes that reflect local needs and concerns, and through our Giving Back Programme we are committed to helping one million local people by the end of this decade. We partner with local primary schools, delivering educational activities, enhancing green spaces and our Heathrow Community Rangers are out and about in our community every day to improve the local environment through garden and landscaping activities, litter picking and bringing community assets such as community centres back to life.

The Heathrow Community Take Off Fund supports local community and voluntary groups by providing access to funding for community projects that matter most to local people and will improve the quality of life in the neighbourhoods closest to the airport. We have pledged to support at least 200 community projects by 2030.

Heathrow Community Trust (HCT) is the airport's independent, primary charity partner, and we have been working together to support our local communities for over 25 years through a range of grant programmes designed to promote community cohesion, raise young people's aspirations, and enhance the local environment. By the end of 2024, we had generated almost £2.5m for HCT towards our commitment of at least £6.5 million by 2030 (since 2022).

### EXAMPLE OF COMMUNITY GROUP SUPPORTED BY TAKE OFF FUND

City Harvest London has been supported by the Heathrow Community Trust, through funding a truck to collect and redistribute surplus food. Over 457 tonnes of surplus food has been collected, including 56 tonnes in Heathrow's local areas.

## DELIVERING FUTURE LOCAL ECONOMIC BENEFITS

Expanding Heathrow would deliver even more benefits for local communities through investment in jobs, skills, and inclusive economic growth. The scheme would create tens of thousands of employment opportunities during construction and operation, as well as long-term investment in training, apprenticeships, and community infrastructure.

Heathrow's current direct supply chain spend with small and medium-sized businesses in our nine local boroughs exceeded £90m in 2024. Expanding Heathrow would open up further opportunities for local businesses to participate in our procurement process, strengthening our local supply chain.



### LOCAL SME CHARGEBOX

ChargeBox Ltd is a pioneer in passenger charging, based in Chiswick. A charging-first, data-led SME, ChargeBox designs and manufactures its smart mobile device charging solutions in the UK. After a successful trial in Terminal 2, Heathrow expanded the rollout across all terminals within four months. The solution has since attracted interest from airports across Europe and North America, having seen it in action at Heathrow.

Expanding Heathrow would also mean significant improvements to the public transport network around the airport. Our Surface Access Strategy, which will deliver a sustainable and affordable transport network, will reduce air pollution and traffic and make it easier for passengers and colleagues to travel to work and for members of our local community to travel around.

Accountability through our community forums, outlined in this section, will ensure that investment in Heathrow translates to investment in the local supply chain, increased education and employment opportunities, improved transport links and the overall sustainable growth of the local area.



## OUR RELATIONSHIP WITH LOCAL COMMUNITIES

At the heart of all our work with local communities is our commitment to engaging openly and constructively to understand concerns and to provide accessible information and an ongoing dialogue.

We carry out engagement through six well-established, independently chaired forums, covering topics including noise and airspace, air quality and surface access. These feed into the Council for the Independent Scrutiny of Heathrow Airport (CISHA) which provides independent oversight of engagement at Heathrow and monitors our plans. CISHA was set up to deliver the Community Engagement Board requirement of the ANPS and is also the Airport Consultative Committee for Heathrow.

# Heathrow Community Engagement Forums

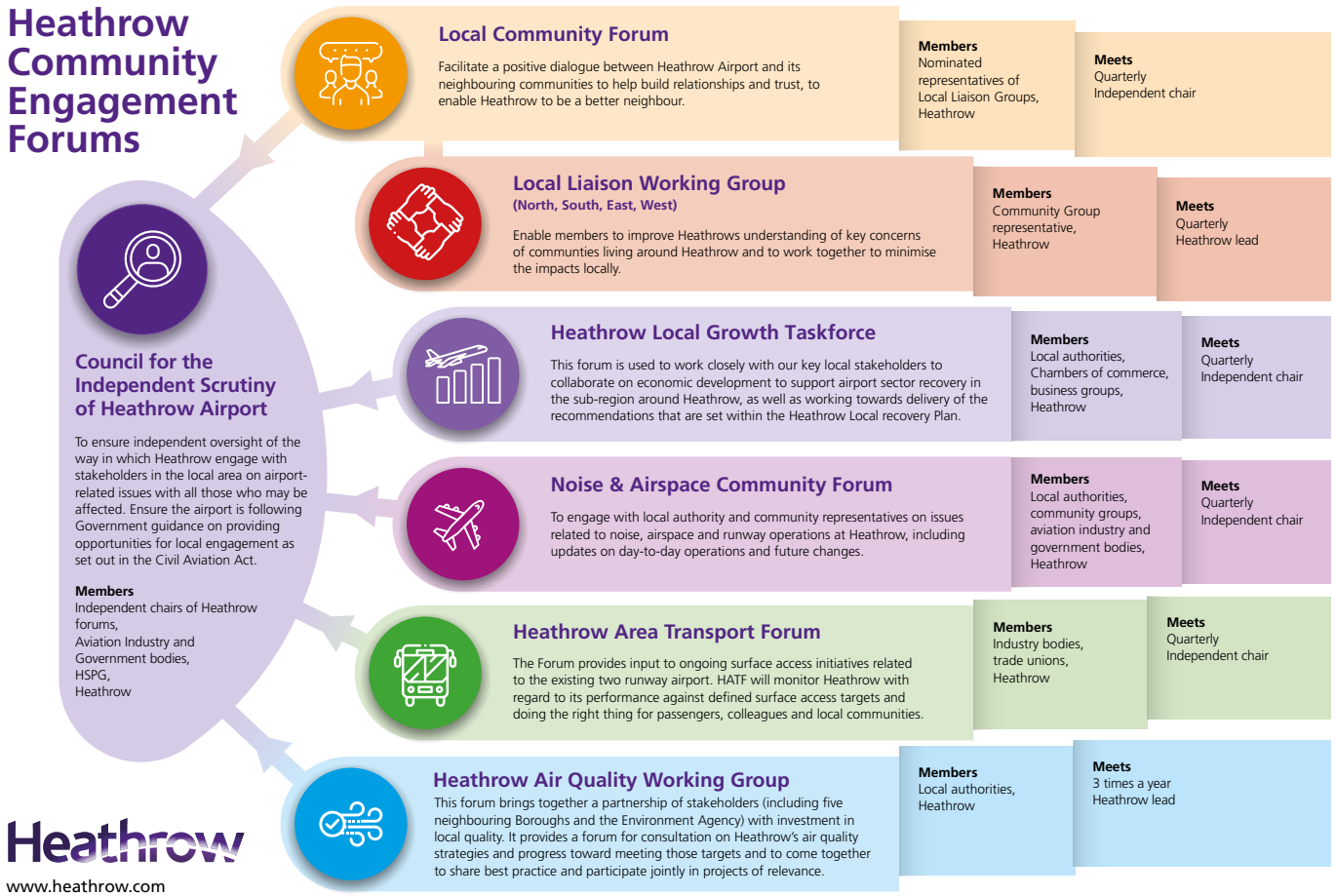


Figure 14 | Heathrow Community Engagement Forums

Heathrow recognises that the benefits of expansion must not come at an unfair cost to those living nearby. We aim to support homeowners whose homes are required for the construction of the third runway at Heathrow, as well as those who live within the designated wider property offer zone. The ANPS sets out our offer to purchase eligible homeowners' property at the unaffected market value, plus a 25% home loss payment. Additionally, the scheme would help cover associated costs such as stamp duty and reasonable legal fees and moving expenses. This scheme is intended to reflect the significant impact of relocation.

The ANPS supports the development of a Community Compensation Fund (CCF), which aims to minimise impacts on local communities. The fund could be used to support local infrastructure and community facilities, environmental enhancements and support for local businesses. The CCF was shaped by consultation and aligned with community priorities, and will be reviewed with input from the community and other stakeholders to ensure it is suitable.

We will engage with local communities to listen and gain insight into how we can support communities where their facilities have been displaced as a result of our expansion proposals.

Our proposal is underpinned by over eight years of design development, consultation and engagement, with three consultations during 2018-2019, where local community members and organisations inputted to shape our proposal. We will continue to engage with communities and authorities around Heathrow for feedback to ensure we deliver benefits and long-term growth for the area. We will work closely with our engagement forums to ensure communities have clear opportunities to engage with us on our plans if expansion is taken forward. The consultation process will be designed with the community at its heart, enabling them to understand the impacts and benefits of our plan.

## DELIVERING FOR THE LOCAL ENVIRONMENT

Expansion and adding capacity inevitably means additional flights to and from Heathrow. However, it is a legal requirement that expansion can only go ahead if our plans meet UK climate obligations and strict rules on noise, air quality and nature conservation. Heathrow's sustainability strategy, 'Connecting People and Planet' sets out our plan to address these areas. As required by the ANPS, an Environmental Impact Assessment will assess likely significant effects of the construction and operation of our expansion project, with an Environmental Statement to be submitted as part of the application for development consent.

We are laser-focused on the impact our operations can have on our local communities and on our responsibilities to minimise this. We must ensure that Heathrow is a good neighbour to the communities around the airport both now and in the future if we move forward with plans for expanding Heathrow.

### MANAGING AIRCRAFT NOISE

Heathrow has a proven track record in managing aircraft noise. Even though the number of flights has increased significantly since the 1970s, our noise footprint has continuously reduced. The record shows that Heathrow has consistently grown while reducing the scale and severity of noise impacts. Independent assessments have confirmed that we are one of the few hub airports globally to achieve material reductions in noise footprint alongside rising passenger and cargo volumes.

#### KEY NOISE STATS

## >80%

More than 80% of aircraft operating at Heathrow are Chapter 14, the quietest type of aircraft

## 37%

37% decrease in the 55dB Lden noise contour from 2006 to 2024

## 195,000

Since 2006, we have taken 195,000 people out of this 55dB Lden noise contour

*Lden is the equivalent noise level (Leq) over a whole day (24-hour period), weighted to reflect increased sensitivity to noise during the evening and night-time.*

Expansion would be delivered alongside limiting and, where possible, reducing Heathrow's noise footprint, achieved through a combination of quieter aircraft, improved flight management and operational flexibility enabled by a third runway. As part of our expansion plans, we would meet all the ANPS requirements including delivering clear and predictable periods of respite through runway alternation, night flight restrictions, sharing the benefits of improvements in aircraft noise technology with local communities and implementing limits and controls on noise through a 'noise envelope' process. A new package of insulation and compensation measures would also support affected homes, schools and community facilities, building on the current programme which has been in place since 1996, with more than 11,500 buildings treated since 1996. We will continue to work with local groups to manage our noise impact, focusing on tackling the negative effects of noise.

### IMPROVING AIR QUALITY

Air quality is fundamental to protecting public health and the environment. Over the last decade, Heathrow has seen significant improvements in air quality and all pollutant levels are below the regulated levels set by the Government. We are proud to have one of the most comprehensive air quality monitoring networks of any airport in the world.

#### AIR QUALITY IMPROVEMENT FROM 2014-2024

## 39% reduction – NO<sub>2</sub>

## 37% reduction – PM<sub>10</sub>

## 35% reduction – PM<sub>2.5</sub>

To encourage passengers and colleagues to travel to the airport sustainably and reduce local air pollution, we have invested in rail links including the Elizabeth line, and our Sustainable Travel Zone that incentivises bus and coach travel. We are also converting airport vehicles to zero emissions or biofuel, investing £6m in on-airport electric vehicle charging points, helping us build one of the highest density electric vehicle charging networks in Europe. From 2025, we will introduce an airside Ultra Low Emission Zone.

By 2030, we are targeting an 18% reduction in ground-level aircraft nitrogen oxide (NOx) emissions compared with 2019 and a 60% reduction in non-aircraft emissions of air pollutants from airside operations.

Expansion must be delivered in full compliance with legal air quality limits. We must demonstrate through our application for development consent that expanding Heathrow will not cause or contribute to any breach of legal limits, including national objectives set under the UK Air Quality Strategy and the Environment Act. We will continue to invest in clean technology and sustainable transport to reduce road traffic and ensure that expansion does not compromise air quality; and we will submit a detailed air quality assessment which will be independently reviewed. As a responsible business working alongside our local communities and committed to being a good neighbour, local air quality is a critical issue for us.

We aim to deliver expansion alongside a continuing improvement in local air quality, maintaining public confidence and supporting the environmental legitimacy of long-term growth.

### **PROTECTING AND CONSERVING NATURE**

At Heathrow, we currently manage around 170 hectares across 13 sites for nature conservation – roughly 10% of the entire airport footprint and equivalent to 238 standard sized football pitches. These sites contain a diverse range of wildlife and make an important contribution to local green spaces, with several sites fully or partially open to the public. We will continue to protect and improve the local environment if we move forward with expansion and will integrate environmental protection across all phases of design, construction and operation. Our plan includes a commitment to meet all legal environmental obligations and to deliver a measurable net gain in biodiversity.



### **IN SUMMARY**

Expanding Heathrow must deliver benefits to local communities and businesses while minimising adverse impacts. We will deliver this in partnership with local councils, authorities, education centres, community members and our forums.

## DELIVERING VALUE, CHOICE AND COMPETITION FOR PASSENGERS AND AIRLINES

Expanding Heathrow will deliver wide-ranging benefits for passengers and airlines. By releasing new capacity at the UK's hub airport, passengers will benefit from greater choice of routes and lower fares. A less stretched, more resilient operating environment will also enhance punctuality and terminal experience. Airlines will benefit from improved service as well as the chance to serve more passengers, offer flights to exciting new destinations and for some, operate from Heathrow for the first time.

Heathrow has been crowned by OAG as the best-connected airport in the world when analysing the number of potential international connections within a six hour period. 77 airlines operate at Heathrow flying to 230 destinations across over 85 nations and regions. Heathrow currently offers 110 flights to long-haul destinations. Heathrow's passenger demand continues to grow and break records with 2024 being our busiest year. Last year Heathrow received 83.9 million passengers – three million more than the previous record in 2019. Demand is outstripping capacity with Heathrow having been operating virtually at capacity for two decades.

Expanding Heathrow will increase capacity for passenger flights by 50%, increasing Air Traffic Movements (ATMs) by 276,000, from 480,000 to 756,000. This could increase passenger volumes up to 150 million passengers annually.

This scale of growth will align Heathrow's capacity with other leading global hubs like Istanbul and Madrid. By matching this scale, Heathrow will be able to provide faster and more reliable journeys, reduce congestion-related delays, and offer more frequent and better-connected services across the UK and globally.

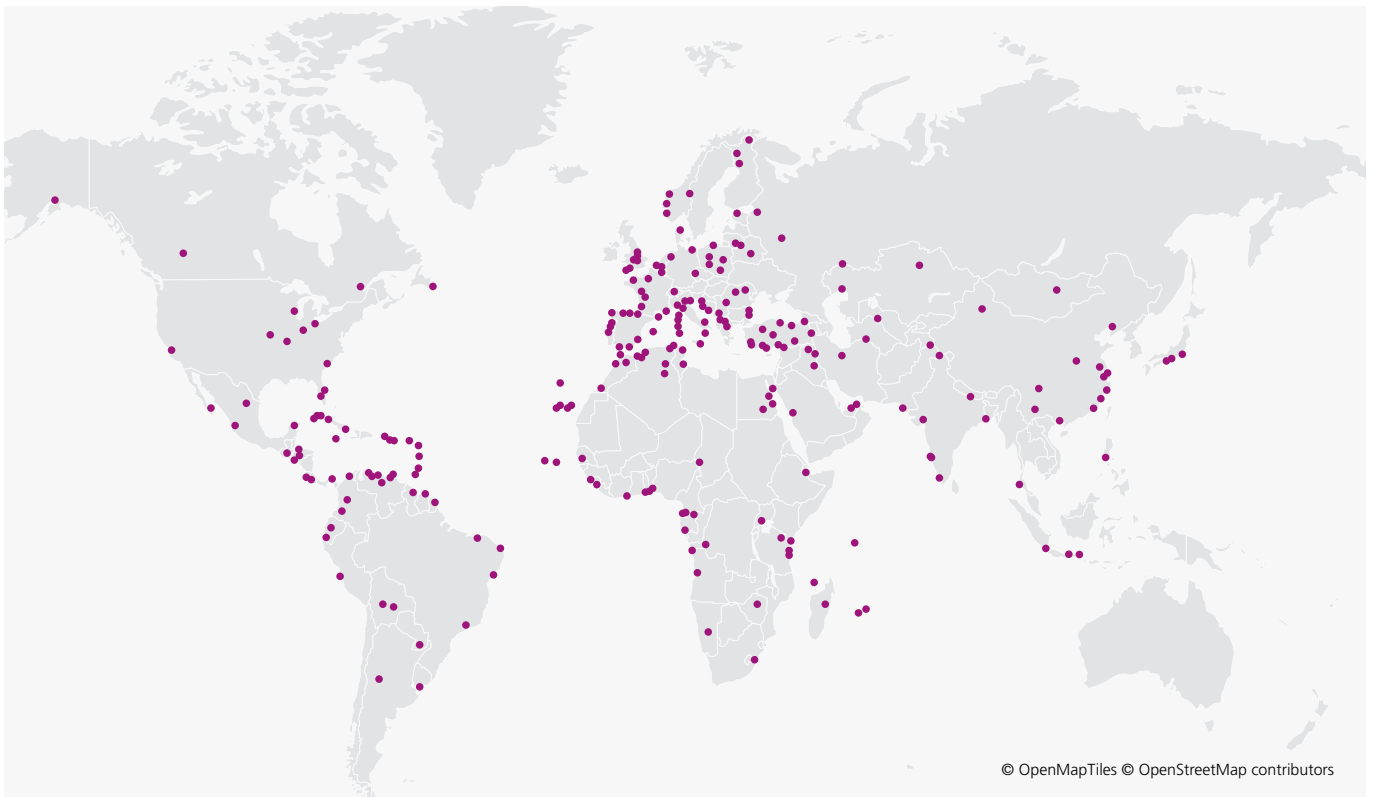
Some of the most valuable routes in the world operate from Heathrow, with the Heathrow-JFK route one of the highest yielding routes in the world, due to the high demand and level of premium passengers using the route. Expanding Heathrow would consolidate Heathrow's role as Europe's hub for North America, providing airlines with more opportunities to operate lucrative routes, therefore sustaining airline business models.



## DELIVERING NEW DESTINATIONS

Expansion would unlock new destinations, providing passengers with greater choice and enabling airlines to serve more passengers and exciting new routes around the world. Additional capacity will also mean Heathrow's network can serve more UK airports, with start and end of day movements, so crucial to connecting with long haul destinations.

The Airports Commission estimate that expansion could support at least 30 new daily routes by 2040. Expansion would deliver opportunities to serve new routes to underserved markets like Peru, increase services to secondary cities in India or China and increase services to Japan where there is high demand for business travel.



© OpenMapTiles © OpenStreetMap contributors

Figure 15 | Benchmark hubs and airports that would be assessed for additional new services

## DELIVERING LOWER FARES

Passengers will also benefit directly from lower average fares as a result of expanding Heathrow. Under current conditions, constrained capacity creates a 'congestion premium' – with demand exceeding supply, airlines are able to charge higher fares, particularly on routes with limited competition, a dynamic often seen in markets for sporting and music events. Frontier Economics estimates this premium is the equivalent of up to additional £80 per short-haul passenger and up to £250 per long-haul passenger.

Expanding Heathrow would unlock the capacity needed to break this trend. Slots at Heathrow as the UK's only hub airport are some of the most valuable in the world. The release of new slots will increase competition among existing carriers and allow new entrants into the market, placing downward pressure on fares. This would open travel to passengers and businesses who might previously have been priced out, increasing opportunities for tourism, leisure, investment and trade with all the economic benefits that brings.

Independent analysis by Frontier Economics estimates that increased competition would reduce the congestion premium from £10 billion to £4 billion per annum. The total benefit to passengers is estimated at £79 billion in present value terms over 60 years – with this saving to passengers alone larger than the level of private investment required for expanding Heathrow.



*Expansion at Heathrow will provide consumer and economic benefits and represents a unique opportunity for easyJet to operate from the airport at scale for the first time and bring with it lower fares for consumers."*

**Kenton Jarvis, CEO, easyJet**

## DELIVERING IMPROVED SERVICES

In addition to providing unrivalled global connectivity and even greater choice of destination, expanding Heathrow will invest in service for passengers and airlines. Heathrow is one of the most efficient major airports in the world and is competitive on quality of service; however key parts of the infrastructure are ageing, so investment is needed to preserve service and competitiveness.

Heathrow is already investing £2.3bn over the next two years to upgrade key facilities, building on over £15bn of private investment at Heathrow over the past 20 years, including in infrastructure like new security lanes and baggage systems. We are already seeing the benefits of that investment and the hard work of our colleagues, with Heathrow this year recording the highest departure punctuality out of the major European hubs; 99% of bags travelled on their flights as expected and 97% of passengers waited fewer than five minutes at security.

We also have a customer-led plan to improve our existing facilities ahead of any new runway capacity coming online. Our 2027-2031 business plan will invest £10bn and deliver tangible outcomes for customers, including improving passenger experience, boosting operational efficiency and resilience and unlocking additional growth capacity within our existing infrastructure. The plan has been carefully designed to deliver the outcomes customers want in an affordable way, with airport charges remaining below what they were a decade ago in real terms. The CAA is now reviewing the plan.

Expanding Heathrow would further improve service for passengers and airlines by relieving congestion across the runway, airfield and terminal systems, allowing operations to run more predictably and reducing service disruption - with reduced queuing and fewer delays. The new terminal infrastructure delivered through expansion will deliver improvements in passenger experience, including modernised terminal facilities, increased seating, and reduced congestion.

While Heathrow is currently the most punctual hub in Europe, the current capacity constraints have a direct impact on the efficiency of airline operations with day-to-day congestion on the runway and at terminals contributing to delays, increased costs and reduced competitiveness for airlines. The addition of a third runway would significantly reduce disruption for airlines, providing them with greater resilience and improved on-time performance, leading to enhanced passenger satisfaction.

That is why expansion is supported by incumbent airlines at Heathrow as well as prospective airlines that see the opportunity that expansion and boosting capacity offers.

## CONCLUDING REMARKS

There is a reason that expanding Heathrow is supported by Chambers of Commerce, regional airports, airlines, unions and businesses and people hailing from Hillingdon and Hounslow to the Highlands and Holyhead. It is because a third runway and the associated infrastructure would be a project of national benefit that would create jobs and economic opportunity for every region and nation in the UK by boosting tourism, connectivity and trade. It would mean the UK retains and boosts its global competitiveness. It would mean passengers and airlines enjoy excellent service, both now and in the future.

The discussion about Heathrow's third runway has been going on for a long time, but it is now time to get on with it. The decades of discussion and debate have led us to this moment, creating a strong base to build from, providing the knowledge and engagement needed to ensure we deliver benefits to all.

We are proud to submit our proposal for the expansion of the UK's Gateway to Growth.



