Metro——Dynamics

Kent & Medway Local Growth Plan Evidence Base

Kent & Medway Economic Partnership

Draft Final Report

February 2026

Metro——Dynamics

Contents

Introduction & Approach

This report sets out the main findings from this work, summarising the analysis and research findings for the four deep-dive sectors, and the possible implication of the research findings for the developing Local Growth Plan. It is accompanied by evidence bases setting out detailed analysis for the four sectors.

As well as cross-cutting themes from our engagement and the four sector evidence summaries this paper contains a set of reflections on the types of opportunities for growth in Kent and Medway, and what this could mean for the local growth plan. These are provided for consideration and discussion by KMEP as they undertake the next stages of developing the LGP.

Introduction

Metro Dynamics were appointed to deliver sector research and evidence to support the development of a Local Growth Plan for Kent and Medway in October 2025. the work was structured in two phases; baseline sectors analysis followed by a set of evidence deep dives of sectors chosen following the baseline.

The first phase, completed in November 2025, was a detailed analysis of the sectoral composition of the economy, and the size and performance of industrial strategy sectors in Kent and Medway looking at scale, degree of specialism and the growth trajectory of sectors.

This analysis showed that while the county has a large and diverse economy, it has a below national share of employment (18.3%) in the 8 industrial strategy sectors, which presents challenges for alignment of the Local Growth Plan to national priorities and funding. Because of its gateway role and the scale of some projects Kent and Medway doesn't necessarily compete with UK locations, for many of its distinctive strengths the competition is international – shipping agents could be based in Singapore of Sri Lanka, distributions uses in France etc. Analysis of the overall composition of the economy showed that there are strengths and areas of comparative advantage for Kent and Medway in sectors that drive demand/need for technology and innovation, and some which are important enablers for IS-8 sectors.

It was agreed that the deep dives would focus on Energy, Ports, Transport and Logistics, Agri-Food and Agri-Tech and Digital and Technologies, sectors where Kent and Medway has clear, demonstrable strength to build on.

Kent and Medway’s sector growth opportunity

Deep dive sectors

*'Val' is short for value, using Gross Value Added (GVA) and GVA contribution per job. 'LQ' demonstrates relative specialisation in Kent and Medway via Location Quotient analysis, comparing the concentration of employment and businesses in the sector with the national average.

Agri-food & Agri-tech				Digital and Technologies				Energy				Ports, Transport and Logistics			
Employment 65,000	Business 4,200		Value £37,600	Employment 25,380	Business 4,590		Value £84,900	Employment 2,840	Business 80		Value £198,500	Employment 32,000	Business 1,640		Value £47,400
One **innovation cluster identified by DSIT**. Large employer, with a high business count, but lower value that other sectors. **Significant strengths in the fruit and vegetable supply chain, packaging activities and FoodTech.** Growth trends are mixed and the sector encompasses more breadth than agri-tech in the industrial strategy.				DSIT identified three innovation clusters. Employs a significant number of people, with several businesses. Value is relatively high, and several **businesses receive equity investment**. Concentration is weak overall, but **strengths in manufacturing**. Growth is positive, but unbalanced, with notable growth in digital and creative and manufacturing activities.				Though only a **small sector, value is especially high**, with a very large contribution to total GVA. Businesses are also more likely to receive equity funding. The sector also aligns with the industrial strategy, particularly with some clean energy strengths. Concentration is low, but the region is a nationally significant asset. **Value growth is high, but size is decreasing**.				Ports and Logistics employs a significant number of people, but business counts are lower. The value is also slightly below average, but higher than other foundational sectors. Benefitting from the coastal geography, the sector has a **relatively high concentration** and is a **gateway to the EU**. Growth overall is positive but warning signs seen in maritime, with **decreases to value**.			
Size	Val	LQ	Growth	Size	Val	LQ	Growth	Size	Val	LQ	Growth	Size	Val	LQ	Growth

Collective opportunities across sectors (I)

There are strong existing and emerging interdependencies between these sectors, creating opportunities for mutually reinforcing growth. When viewed together, their combined strengths present a more distinctive and transformative opportunity for Kent and Medway than when considered in isolation.

These four sectors each have their own assets, constraints and long-term trajectories. But the real opportunity for Kent and Medway lies not in treating them as separate domains, but in recognising the interconnections between them and the compound value created when they operate as a connected economic system. Together, they can form a mutually reinforcing network of demand, innovation, capability and supply chains. When considered collectively, they reveal a much larger growth and transformation opportunity for the county, building on its geography, infrastructure, research assets and business base. This includes:

- Ports as anchors for cross sector growth. Kent and Medway's ports (including Eurotunnel) can act as a driver across sectors. Electrification of the short straits creates an opportunity to attract new energy investment, the importing and processing of perishables (e.g. avocados) is an opportunity to expand the agri-food sector, the ports will drive logistics demand and therefore demand for technology and activities that will underpin future logistics growth etc. They also play a key role in the ability to deliver the infrastructure that growth will require, enabling sustainable movement of goods via rail and river, supporting construction activity etc.
- Energy as the enabling backbone of sector transformation and growth. Reliable, resilient energy is fundamental to innovation across all sectors, powering automation, electrified freight, controlled-environment agriculture, digital infrastructure etc. The pace at which industries modernise will depend on the development of Kent and Medway's future energy system. Investment in energy solutions will also provide economy-wide benefits, particularly for logistics, manufacturing and agriculture, sectors that are both major consumers of power and potential early adopters of new energy technologies. If the county can work with government and providers to translate this into lower local energy costs, it would support existing businesses and strengthen the region's attractiveness for inward investment.

Collective opportunities across sectors (II)

With strong existing and potential interdependencies there are opportunity to generate mutually re-inforcing growth across these sectors, with the combination of strengths creating opportunities that are more distinct.

- Digital technology as the cross-sector accelerator: Digital solutions are a shared enabler of efficiency, innovation and productivity growth across ports, energy and agri-food. As these sectors modernise, digital capabilities are becoming increasingly embedded in their operations, from real-time logistics management to energy optimisation and precision agriculture. Digital firms also benefit from this demand, strengthening the region's innovation and creating growth opportunities in the digital sector through enabling growth elsewhere. With a strong and growing digital sector spanning manufacturing to IT services Kent should look to maximise the opportunities for local digital firms to meet the needs of large sectors, building networks that span sectors, with a particular focus on how to create opportunities for SME's on both sides of the transaction, providing and receiving digital solutions.

- Agri-food as both a beneficiary and contributor to innovation. Advances across digital technologies and clean energy will benefit the Agri-Food sector, increasing productivity, lowering costs, and changing the scope of possible activities and the sector is a source of demand for new products and solutions. The strength of the sector in Kent and Medway and the enabling R&D infrastructure make it a strong testbed for innovation. The sector's scale and diversity create opportunities for trialling new technologies, strengthening supply-chain links with logistics and energy, and supporting more resilient and sustainable production systems. As agri-food businesses develop and adopt advanced technologies, they can reinforce demand for digital skills, technologies and energy solutions, helping accelerate wider transformation across the economy.

Cross cutting themes

Whilst each sector faces their own specific challenges, and have distinct growth opportunities, there are emerging areas of common challenge/need that the Local Growth Plan should take into account.

Fragmentation

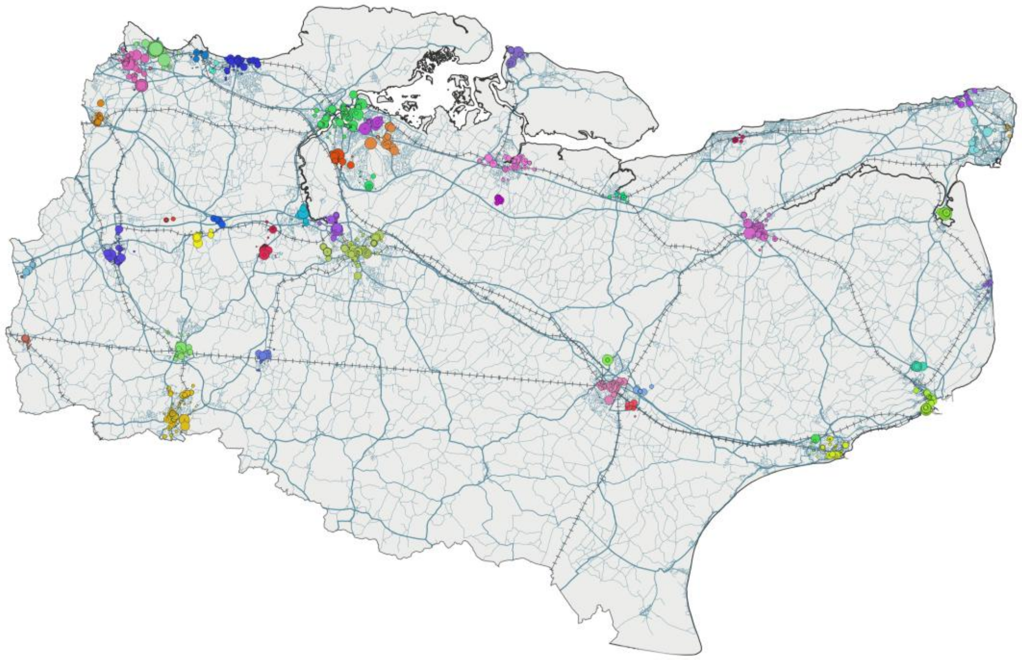
Kent and Medway is a large, polycentric place, with economic activity dispersed widely. Without a clear centre of gravity for the economy we see fragmentation in the economic and innovation system.

Stakeholders describe a landscape where businesses, ports, logistics operators, FE colleges, universities, local authorities, etc each hold pockets of capability, but operate in parallel rather than as a connected system.

Economic activity is dispersed with no clear commercial or innovation centre of gravity, making it difficult to form clusters, sustain collaboration or present a unified proposition to investors.

This fragmentation shows up in inconsistent business support, unclear pathways into skills and research assets, weak integration between border operations and local supply chains, and a lack of mechanisms to translate major projects into wider innovation spillovers.

Spatial concentrations of emerging economy businesses in Kent & Medway



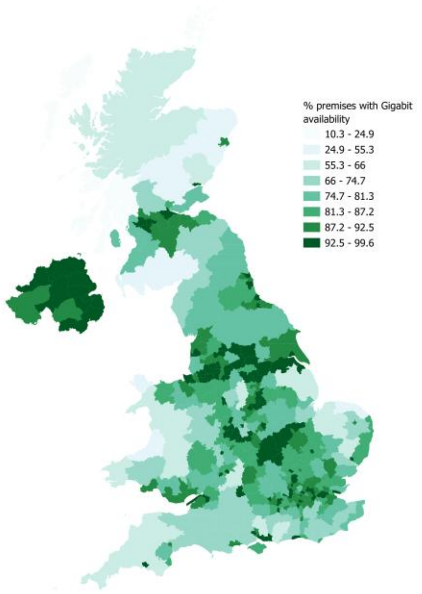
Source: Metro Dynamics analysis of Data City data

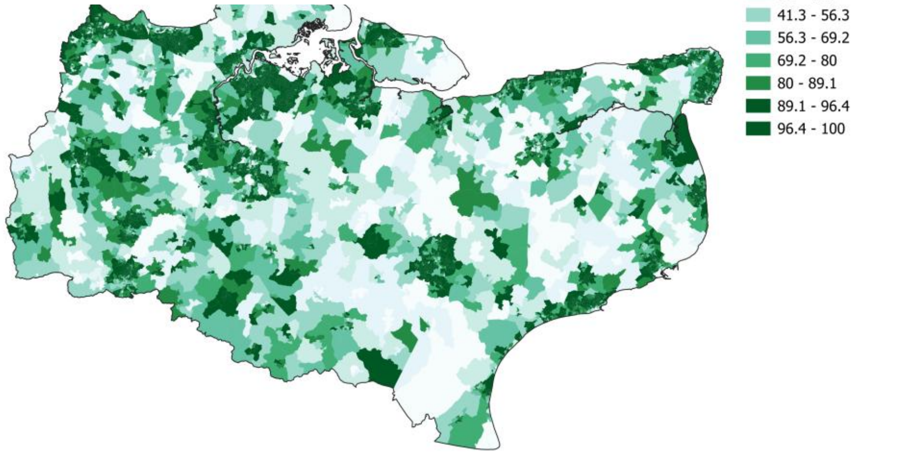
Infrastructure needs

Kent and Medway face a number of infrastructure challenges that influence the region’s capacity to support innovation, sector growth and long-term economic resilience.

- **Space constraints:** Stakeholders repeatedly highlight a shortage of suitable space including innovation facilities, incubation and grow-on space to support new and growing firms, and flexible space to enable collaboration and act as hubs for sector activity.
- **Digital Connectivity**: Digital infrastructure is inconsistent across the region, especially in rural and semi-rural areas. Poor broadband reliability and limited high-speed connectivity constrain business productivity, inhibit digital adoption, and limit the growth of data-intensive sectors such as creative digital, cyber, and advanced manufacturing. This unevenness also affects education providers’ ability to deliver digitally-enabled training at scale.

% of premises with Gigabit availability





Source: Connected Nations, 2025

Infrastructure needs (2)

- **Energy capacity and affordability:** Across stakeholder groups, there is recurring concern about insufficient grid capacity, long lead-in times for new connections, and the high cost of energy. These constraints affect the growth by delaying development and by acting as barriers to technology and innovations like controlled-environment agriculture, robotics, and electrified production.
- **Transport capacity, connectivity and reliability:** Parts of the strategic transport network experience capacity pressures and inconsistent connectivity, which can affect the reliability of supply chains and the movement of goods and people across the region. The cessation of international rail and the under-utilisation of other assets limit the potential of the network. Constraints on key corridors, limited alternatives, and variable last-mile access can create delays and reduce the predictability that businesses depend on. These challenges can also influence investment decisions and the ability of firms to optimise their operations within Kent and Medway.

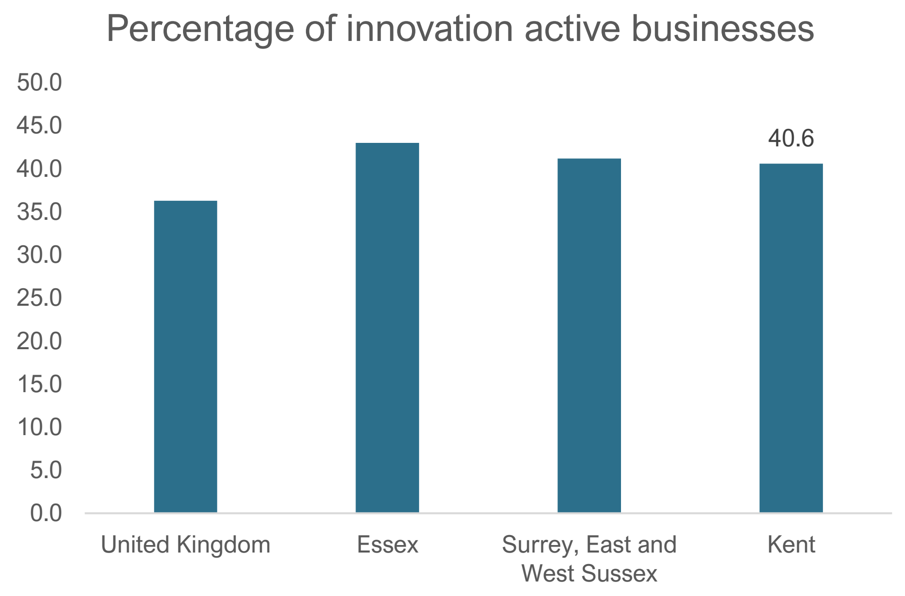
Congestion levels on strategic road networks

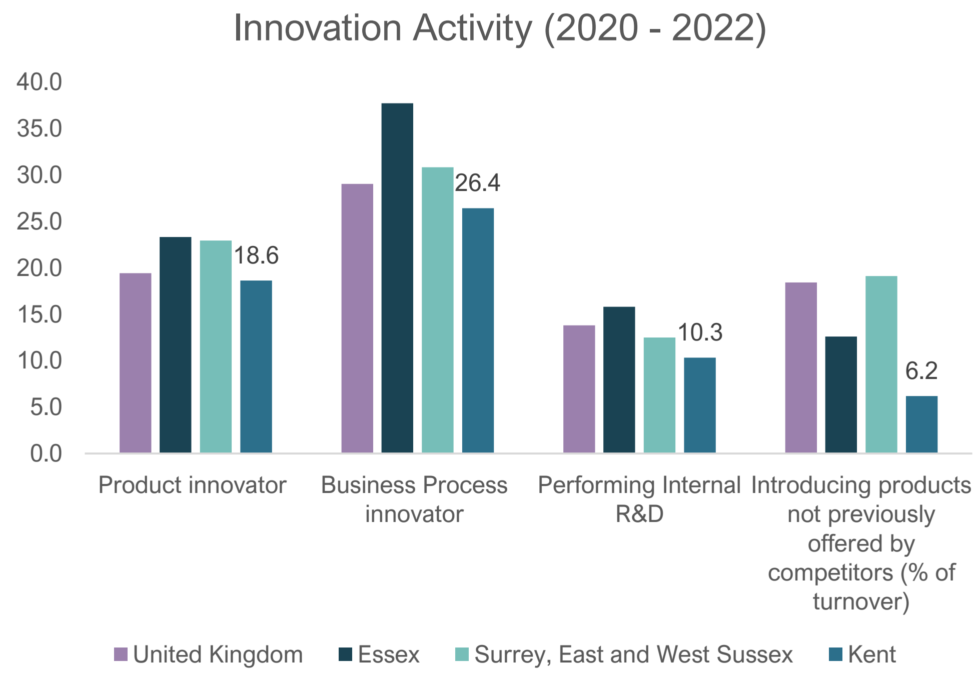
Innovation

While Kent and Medway has some real areas of strength the innovation system is disconnected and lacks visibility to businesses and more widely.

Kent and Medway's share of innovation active businesses is above the national average, but lower than regional comparators and there are lower shares of businesses engaging in each of the types of innovation activity. Reconciling these findings, shown on the right, likely means that Kent & Medway has fewer businesses carrying out more than one activity, as well as having lower shares in each.

As well as fragmentation stakeholders have highlighted challenges around infrastructure (including digital connectivity and space), ability to engage with SMEs and the lack of central hubs and a clear innovation narrative.





Source: UK Innovation Survey 2023, Department for Business and Trade

SME Needs

SMEs play a major role in the local economy, creating jobs and value across the region, but capacity limits are a challenge for a growth agenda.

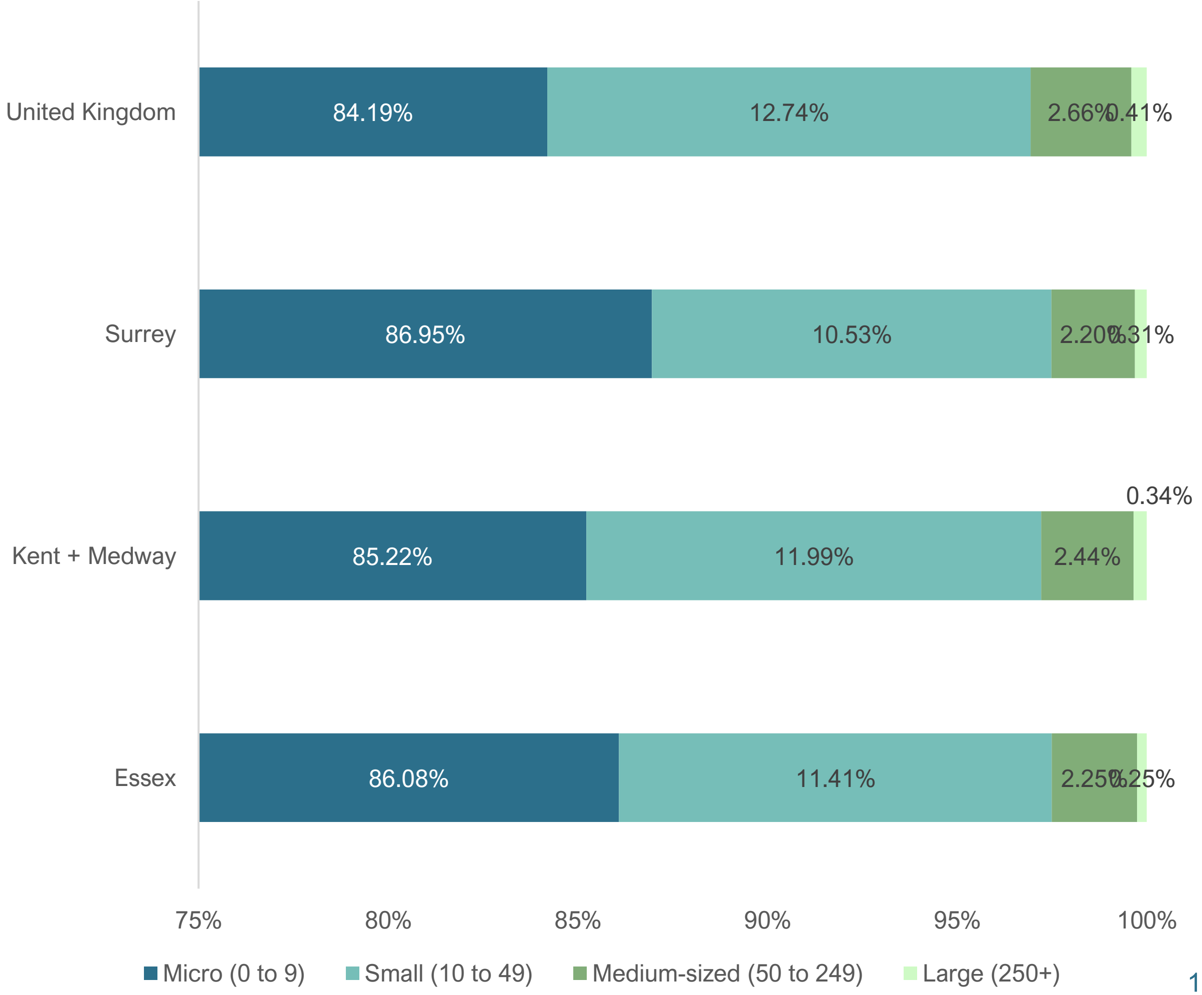
Over 99% of Kent and Medway's businesses are SMEs, and while this doesn't differ greatly from national and regional picture (it has higher share of large businesses than Essex and Surrey) this comes with structural factors.

Stakeholders describe challenges that affect their ability to grow, innovate and engage with support systems including

- Limited capacity to invest in training, adopt new technologies or participate in collaborative activity.
- Access to finance is a widespread challenge
- Difficulties navigating the landscape of support and procurement.

While SMEs are highly prevalent, they often lack the infrastructure, bandwidth and routes to market needed to fully participate in and benefit from the region's growth ambitions, with inconsistent visibility of business-to-business networks and limited opportunities to form clusters or share resources, particularly in sectors dominated by micro-firms reinforcing these challenges.

Business base (local units) by employment

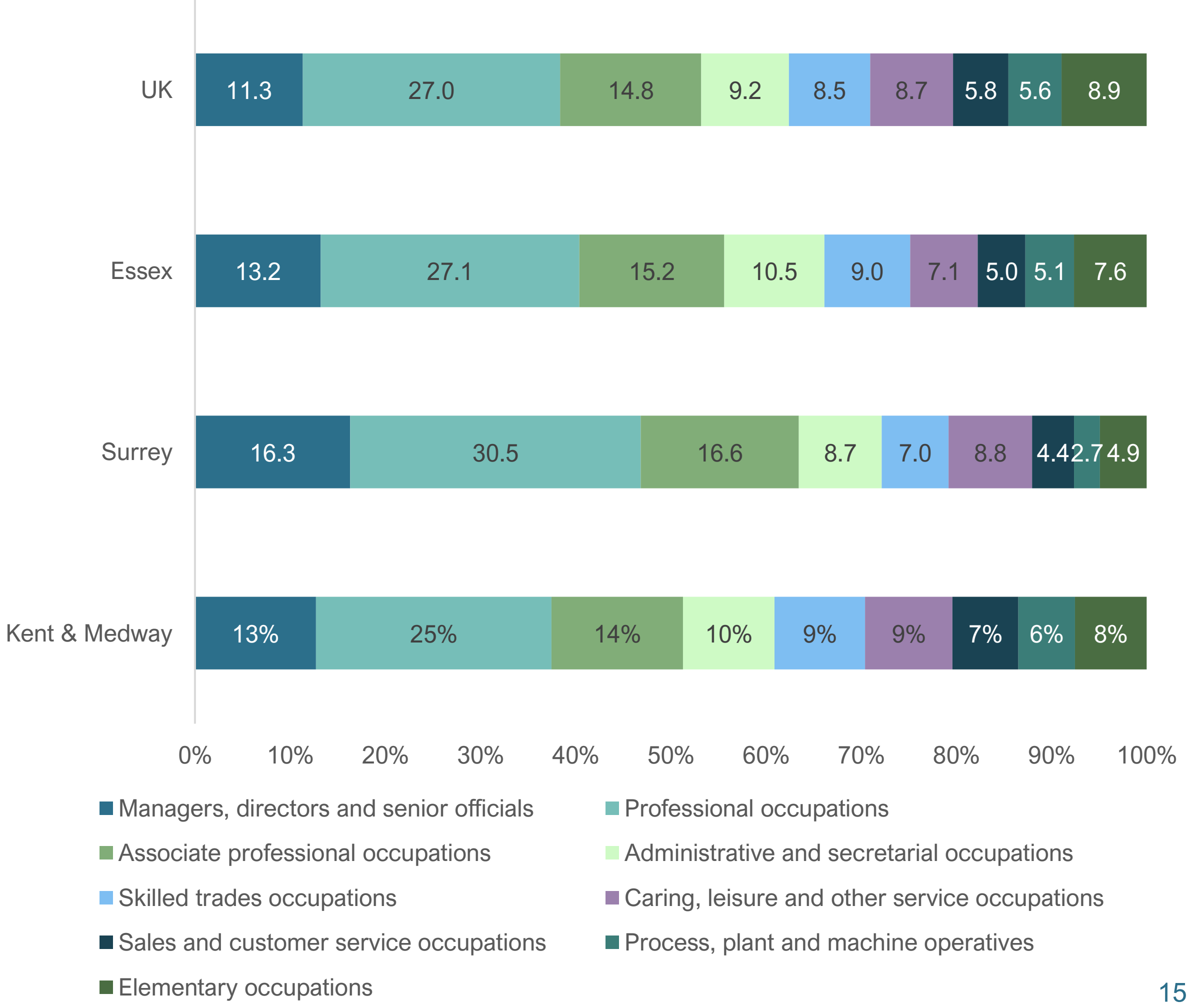


Source: UK Business Counts - local units by industry and employment size band. 2025

Skills

Kent and Medway faces a number of skills challenges.

- Technical skills shortages: Employers report gaps in engineering, digital, construction, food production and health-related roles, with shortages most acute in occupations requiring higher technical proficiency or sector-specific accreditation.
- Employer engagement: While LSIP structures have strengthened collaboration, many SMEs lack the time and resources to participate fully in curriculum design, apprenticeships or ongoing training, which constrains demand-led provision.
- Training capacity: FE and HE providers face challenges updating facilities, equipment and delivery models to meet emerging needs, particularly around digitalisation, decarbonisation, Industry 4.0 and advanced manufacturing.
- Cross-Cutting skills needs: Decarbonisation, digitalisation and SME engagement have been recognised as shared priorities; however, employer readiness, resource availability and local digital connectivity result in uneven progress across the region.



Source: Annual Population Survey, ONS

Sector Deep Dives

Setting out the key findings from each sector deep dive, describing the distinctive characteristics of the sector in Kent and Medway and potential implications for the Local Growth Plan.

Agri-Food & Agri-Tech

Description of the sector

The agri-food and agri-tech sector is a large and significant contributor to Kent and Medway's economy, with substantial employment, business, and GVA, but lower productivity.

The Agri-food and Agri-Tech sector in Kent and Medway sector covers four broad activities:

- **Primary production:** such as agriculture, forestry and fishing, centred around farming of crops, as well as assets in bioengineering, alternative proteins and viticulture.
- **Processing & manufacturing:** transforming raw agricultural outputs into food and drink, as well as packaging activity for onward sale or use.
- **Wholesale:** distributing food and beverage products sold as goods to households, businesses and export markets.
- **Agri-tech and food-tech:** enabling technologies that boost efficiencies in agriculture and food processing.

Agri-food and Agri-Tech accounts for 8.5% of total employment (65,000 people) across 4,200 businesses in Kent and Medway.
The sector generates £2.4bn in GVA (4.8% of the total GVA), giving an average GVA per worker of £37,600.

65,000 **Employment** **-0.7% CAGR**	**4,200** **Businesses** **-1.1% CAGR**	**£2.4bn** **Gross Value Added** **-2.4% CAGR**	**£37,600** **GVA per job** **-1.7% CAGR**	**0.95** **Average Concentration** **-4.9%**

*CAGR refers to the Compound Annual Growth Rate across five years, meaning the average annual growth rate each year between 2018 and 2023.

Source: Metro Dynamics analysis of ONS regional GVA datasets, ONS Business Register and Employment Survey (2017 and 2023) and ONS UK Business Counts (October 2025).

Distinctive features of the Agri-Food & Agri-Tech sector in Kent and Medway

Kent and Medway stands out as a leader in agriculture and horticulture, with greater prevalence of businesses investing in science, innovation and technology than other regions. There is also significant presence in the full supply chain.

- **Fruits, Vegetables and Horticulture:** Kent and Medway's unique geography and heritage as the 'Garden of England' and a long tradition dating back centuries means there is a real comparative advantage and embedded expertise for fruit and vegetable production in the region. The county benefits from a variety of soils well-suited to growing fruits and vegetables and enjoys the most sunshine in the UK. As a result, the county produces c.80% of UK top fruits and has a large and growing viticulture sector.

- **Science, Innovation and Technology:** Businesses in the region are more innovative, with more than double the share receiving R&D grants and reporting R&D expenditure. These are supported by key innovation assets, such as science parks, universities, and plant science businesses like NIAB at East Malling Trust, which require highly skilled professionals. There is a close relationship between science and industry, with regular interaction between growers and researchers, often at East Malling or Discovery Park; however, direct interaction with academia is less frequent. The region also hosts several agri-tech businesses with strengths in FoodTech and precision breeding. Significant and ongoing innovation in water efficiency, pest/insect monitoring, smart horticulture, circular bioeconomy, controlled environments, vertical farming, climate resilience and alternative proteins.

- **Supply chain benefits:** Significant presence of all aspects of the supply chain, from growers to manufacturers and retailers. Proximity to Dover gives exceptional access to EU markets and import-export flows, close access to London is also a strong consumer market, and supports proximity sectors like the visitor economy, such as vineyards. Major packaging operations also locate locally such as DS Smith, Smurfit WestRock (where 60% of packaging goes into the food system) and PrepWorld.

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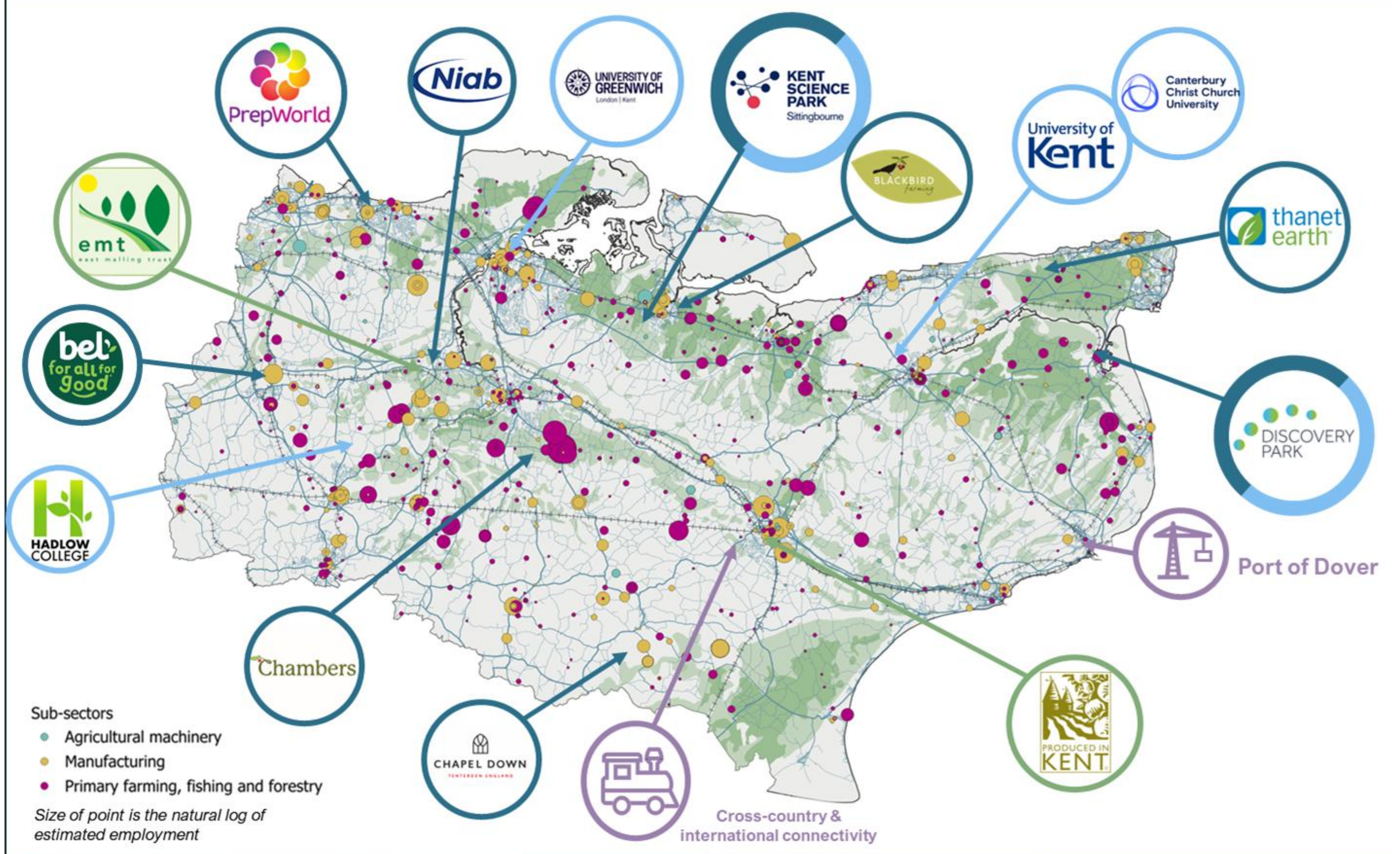
Kent & Medway’s Agri-Food & Agri-Tech Sector Ecosystem

Kent and Medway has the critical assets and business base to make it a growing innovation cluster



Actors & Assets		Infrastructure	Enablers
A critical mass of geographically and economically proximate firms with many specialising in emerging sectors	Key anchor, HE & FE institutions and supporting organisations & a supply of talent, skills and knowledge	Physical (transport, road networks, energy systems) and digital assets that support the flow of ideas	Investment capital to take risks and to fund research/expansion and a supportive policy environment

Networks to share information and knowledge, coordinate activities and promote a shared innovation culture and wider regional linkages.

Source: Metro Dynamics analysis of Data City Data

Summary Findings

Scale

A large and significant sector of Kent and Medway's economy, yet it is often undervalued in economic statistics. Activity occurs across the value chain, but distinctive specialisms lie within horticultural activity, bioengineering and alternative proteins, with Kent and Medway accounting for a large share of national fruit, vegetable, and viticultural production. The region is also home to a sizeable cluster of anchor institutions, networks and innovation assets.

- **40%** of the UK **high-value horticultural production**
- **80%** of British **apples** and **pears** tonnage
- **Agri-tech and food-tech** is **45% more specialised** than 5 years ago

Infrastructure

Businesses need substantial industrial space. Demand outweighs supply, with lower vacancy rates than comparators, but the quality of space is lower. However, specialist facilities are increasingly important for growing the sector, like R&D testbeds, processing labs, and glasshouse facilities, to support technology adoption. Significant congestion along key transport routes like the Dartford Crossing disproportionately impacts the sector. Planning land use and utilities are also identified as significant barriers.

- Low **vacancy rates** for **food processing** property types at **2%**
- **18%** of occupied **industrial** space is **Grade A**, lower than regional average
- Average delays of **80 seconds per vehicle mile** on the **Dartford Crossing**

Future Trends

Farms are adopting automation, digital tools, AI, and alternative proteins. Climate pressures and new sustainability regulations are driving water efficiency and low-carbon practices, but also provide opportunities for strengthening industries like viticulture. Post-Brexit rules and grant schemes influence operations, particularly for the supply of seasonal workers. Workforce challenges, rising consumer demand for sustainable and locally sourced food, and expanding investment in green technologies are redefining the sector.

- **Warmer temperatures** support growth in **ripening grapes**. Kent and Medway is home to **27%** of the UK's **vineyards**, with a **125% increase** since 2010
- Region is **1st** for hours of **sunshine**
- **2nd** for **temperature** after Essex

Summary Findings

Innovation

The region is home to many innovative businesses, with a much higher share of businesses spending on R&D and receiving grants than the sector and regional averages. Key assets such as East Malling Trust, universities, and science parks foster innovation and the development of new technologies. Since 2022/23, the region has secured Innovate UK funding for projects including including breeding climate-resilient crops and using AI for disease detection.

- Kent and Medway have secured **£21.1m** in **Innovate UK** funding
- **88%** higher concentration in **precision breeding** than nationally
- **58%** higher concentration in **FoodTech** than nationally.

Enterprise

Agri-food businesses in Kent and Medway are older, more established and more likely to have international parent companies than the wider regional or national average. Start-ups are less common, but the sector shows a higher share of scale-ups. Businesses also perform well in growth signals, being more likely to receive equity funding than other regions, as well as a higher share of businesses exporting.

- Agri-food businesses are **50%** more likely to be **exporting** in the region
- **10 equity funding rounds per 1,000** agrifood businesses, **8** in the UK

Human Capital

Workers are often lower-skilled, but in Kent and Medway, there are more high-skilled occupations, such as biological scientists, than in other regions. Job adverts are lower than in other sectors, but more common in Kent and Medway than nationally. An increasing demand for specialist knowledge in emerging tech or practical skills means training provision is important. However, perception remains a constraint.

- **20%** of occupations are **high-skilled**
- **45% higher demand** for **farmers**, **33%** higher for **biological scientists**, **28% less** demand for **process operatives**
- **19** job vacancies per 100 jobs, compared to **15** in the UK

Considerations for Local Growth Plan

Enterprise	Innovation	Human Capital	Infrastructure	Future Trends
Provide enterprise support to help reduce high barriers to entry for new businesses. Access to finance will help avoid businesses being too risk-averse, and lacking recognition for the sector's potential for high returns. Aim to reinstate grassroots funding streams by providing small grants to micro and small businesses	Support collaboration between all businesses to ensure that even smaller producers can benefit from new, innovative research and technology. Industry-wide representation may help support this and reduce impacts of significant fragmentation. Encourage technology adoption such as the use of data to model investments and the use of testbeds for innovation.	Help upskill residents with the right practical skills for agricultural work, not just theoretical, using accredited courses and apprenticeships. Help promote the sector at the secondary school level by demonstrating the technical pathways available, including engineering and tech careers. Ensuring skills are reflected in the LSIP.	Planning reform, as processes for agricultural infrastructure such as polytunnels, is increasingly complex and costly due to important requirements like biodiversity net gain. A need to improve road and rail links to support trade, notably at Thames Crossing, on the A2, and reopening of international rail services. Water supply is also an issue in manufacturing.	Messaging of value - not always seen as an important sector or one that can drive growth/innovation. Resilience of food production, changing climate conditions and changing consumer demand

Clear messaging around strengths, which can include a prospectus of assets like R&D online, and promoting innovation summits. It is also important to provide clear messaging about alignment with other priorities. For example, nutrition is a key factor in driving health outcomes for residents, and further growth in horticulture can help reduce health inequality and strains on the NHS. Other opportunities include growing the visitor economy through viticulture and promoting vineyards, promoting policies such as the Cellar Door tax relief to support local business.

Ports, Transport and Logistics

Description of the sector

The sector brings together a range of functions that enable the movement of goods into, out of, and across the region and the wider country.

These activities form a critical interface for national and international trade, underpinning the flow of essential goods. With major transport connections through Kent and Medway it is the gateway to the European continent and plays a significant role in trade security and the movements which enable the national economy. The Port of Dover handles approximately £144 billion worth of trade annually, accounting for 33% of all trade in goods with the EU.

Kent and Medway's coastal geography means the sector is both large and spatially concentrated, with strengths in ports along the coast. Most of the growth is driven by logistics, and there are areas of particular concentration in the northwest of the county and along the Thames corridor, with several local authorities have concentrations more than twice the national average.

The Ports, Transport and Logistics sector is a significant part of the Kent and Medway economy, supporting 32,005 jobs across 1,640 businesses and generating £1.5bn in GVA in 2023.

32,005
Employment
3.5% CAGR

1,640
Businesses
6% CAGR

£1.5bn
Gross Value Added
-0.2% CAGR

£47,403
GVA per job
-3.6% CAGR

1.11
Average Concentration
3.7% CAGR

Source: Metro Dynamics analysis of ONS regional GVA datasets, ONS Business Register and Employment Survey (2017 and 2023) and ONS UK Business Counts (October 2025). Dover Harbour Board Annual Report & Accounts 2024.

Distinctive features of the Ports, Transport and Logistics sector in Kent and Medway

Kent and Medway's geographic advantage underpins its strength in the sector, underpinned by nationally significant gateway assets at Dover and the Channel Tunnel forming the UK's fastest and highest-volume short-straits freight route.

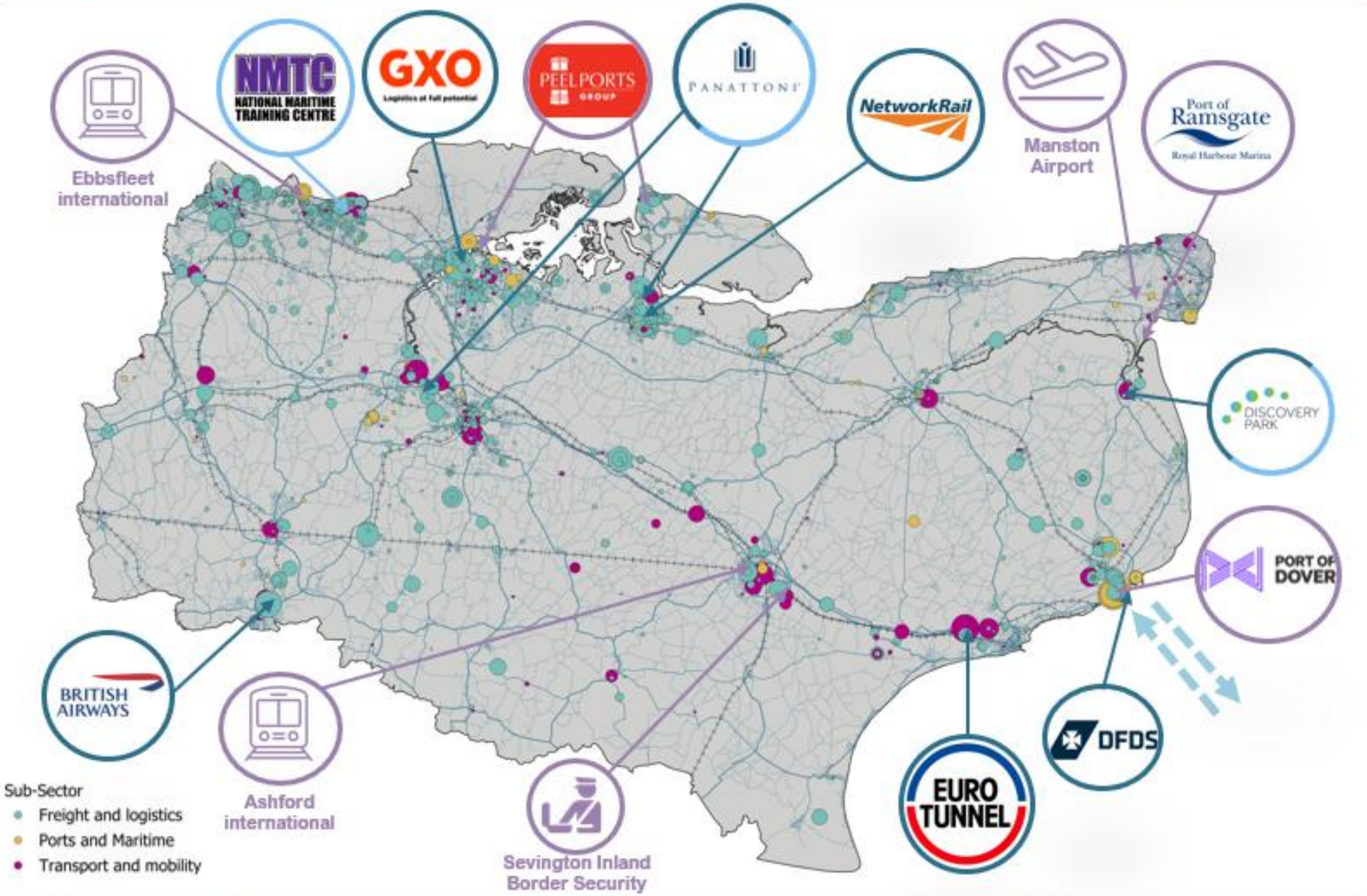
Activity at Dover is complemented by a wider cluster of ports creating one of the most concentrated multi-port geographies in the country. Looking North-West as well as South and East, proximity to London is a distinctive feature; the position on the River Thames creates opportunities, with the county offering proximity at lower costs than other hotspots and in the long-term, opportunities for growth on inland waterway routes, contributing to the transition to more sustainable sector.

The region benefits from multimodal connectivity, with High Speed 1 (unique among UK counties), international rail infrastructure in Ashford and Ebbsfleet International, fast rail access to London, and strategic road corridors linking directly to the M2, M20 and M25. Port operators have also identified opportunities to expand rail freight usage, with existing lines currently underutilised and scope to enhance connectivity to unlock further capacity. This network gives businesses rapid access to domestic and European markets, making the county a highly competitive base for distribution, fulfilment and time-sensitive supply chains.

The region's gateway assets give it a natural advantage for developing and deploying innovation in areas such as border processes, customs technology, real-time logistics management, high value and perishable goods handling, and emissions reduction. With complex, high-volume environments including Dover, the Channel Tunnel and the future Lower Thames Crossing, Kent and Medway offer a high-value context for companies designing solutions under real operational pressures.

Kent & Medway's Ports, Transport and Logistics Sector Ecosystem

A logistics and transport system that connects Kent and Medway's ports, operators and infrastructure into a nationally important gateway for the movement of goods and people.



Actors & Assets		Infrastructure	Enablers
A critical mass of major ports, logistics, and transport operators and employers providing operational capacity to underpin sector activity at scale.	Interconnected employment sites, operational hubs and specialist training facilities clustered along key gateways and strategic transport corridors.	A unique concentration of nationally significant physical anchors that support high-volume, cross-border movement of goods and people, with significant latent capacity across underutilised port, airport and international rail assets.	Coordination and operating conditions that allow dispersed assets and employers to function together across Kent and Medway's transport corridors.

Networks that link assets, employers and infrastructure across the county, supporting coordination, resilience and efficient movement.

Source: Metro Dynamics analysis of Data City data

Summary Findings

Scale

The sector accounts for a growing share of local employment and output. There is a high and growing concentration of activity in this sector – it is more important to Kent and Medway's local economy than it is elsewhere. Alongside this strength, the sector has untapped capacity in a number of underutilised transport and port assets, including Ramsgate Port, international rail stations at Ebbsfleet and Ashford, and Manston Airport present opportunities to increase rail freight and unlock additional connectivity, subject to targeted infrastructure amendments.

- **Business numbers** growing at a rate of **6%** CAGR
- **5 of the 6 sectors** with more than twice the national concentration are in **water transport**

Infrastructure

Nationally significant port and transport that give the region a critical gateway role and strong foundations for trade and logistics. At the same time, capacity pressures, inconsistent connectivity and gaps in multimodal options mean the infrastructure does not always operate as a fully reliable, resilient system, limiting its ability to support growth at the scale the economy demands.

- **95%** of space is industrial, with rent costs roughly **15% cheaper**
- **15%** of space is **Grade A**, compared to 20% nationally
- Lower warehouse vacancy rate than comparators at **6.8%**

Future Trends

Serious change in recent years to the system, and in the role Ket plays with Dover, now a case of adapting more completely and being in a position to meet future demands and needs. Region is seeing a shift towards integrated digital systems, incorporating smart, green logistics, supply chain optimisation. Key future needs will include electrification.

- The Lower Thames Crossing to more than **double road capacity** connecting to Essex.
- Ashford international reopening could inject **£534 million** a year into the visitor economy, and up to **£2.7 billion over five years.**

Summary Findings

Innovation

Top technology strengths centre on tracking tech, across both supply chain logistics and e-commerce, with a concentration of supply chain service providers and a strong base of marine and maritime activity. The share of firms reporting spending on R&D is lower than across all businesses in the county but higher than the sector nationally.

- **112%** higher concentration in **Supply chain logistics** than nationally
- **90%** higher concentration in **Marine and Maritime** than nationally
- Significant strengths (~**70%** more concentrated) in **tracking technologies**

Enterprise

Business have a larger physical footprint on average than the sector regionally.
There is a more established business base with lower share of firms established in the last 5 years.
Higher proportion of scale ups in Kent and Medway than across the sector nationally.

- Ports, transport and logistics businesses are **40%** more likely to be **exporting** in the region
- Mature business base with **73%** of businesses established, compared to 64% nationally

Human Capital

Across the whole of the sector jobs are mainly in low skilled occupations but the needs of the sector are changing with growing demands for digital skills. The workforce also includes customs expertise and specialist technical and engineering capability supporting gateway, maritime and internationally significant transport infrastructure.

- **22%** of occupations are highly-skilled
- **27** job vacancies per 100 jobs, compared to **22** in the UK
- High concentration of **road and rail** transport offers, with lower concentration of employment linked to road transport.

Considerations for Local Growth Plan

The LGP is an opportunity to clarify what growth for the sector should look like, as well as what is required to achieve this, should aim to increase the overall value of the sector to the region and create opportunities for skilled jobs and wider digital supply-chain development.

Enterprise	Innovation	Human Capital	Infrastructure	Future Trends
Kent and Medway's geography means the sector will remain a core part of the economy, and the Local Growth Plan is an opportunity to drive higher-value activity through it; increasing innovation, creating more knowledge-intensive roles, and positioning Kent and Medway as a place where new logistics technologies, systems and practices can be developed, trialled and tested.	Developing innovation hubs around major assets to support and accelerate transformation, providing spaces for collaboration, technology adoption, testing and cross-sector problem-solving.	Addressing skills gaps across the system, not only driver shortages but the wider technical, engineering, digital, seamanship and operational skills needed as the sector transforms – and raising awareness of the breadth of careers the sector offers.	Advocating for infrastructure requirements to unlock growth, particularly rail, where investment in capacity, connectivity and freight-enabling improvements will be essential to support more efficient and sustainable movement of goods. Growth will also depend on improvements in wider cross-sector infrastructure, including energy capacity and grid connectivity.	The logistics sub-sector is undergoing deep evolution – no longer a traditional, manual, process-driven sector, it is increasingly shaped by technological change, sustainability pressures, and expectations around transparency and efficiency. This creates significant opportunities for technology integration, innovation and new operating models.

Developing governance and system design that reflects the critical national role of the logistics system in Kent and Medway, ensuring greater coordination, clarity of responsibility and long-term resilience.

Addressing the infrastructure constraints and making the most of under-used capacity that exists (e.g. Manston, 2 closed international stations) of significant potential to marry local growth with national scale opportunity - and address the challenges present locally as a result of Kent and Medway's national role in the movement of goods

Digital & Technologies

Description of the sector

The Digital and Technologies sector is a high-value and fast-growing contributor to Kent and Medway's economy, characterised by strong productivity, a broad SME base, and increasing importance as an enabling sector for wider economic activity. Activities, which start with the manufacture of digital hardware, provides the technological foundation for digital and creative content creation and IT services that underpin business operations across multiple sectors.

The sector is made up of three key sub-sectors:

- **Digital manufacturing:** Manufacture of hardware that supports digital technologies, including electronic and digital equipment, components and instruments.
- **Digital and creative:** The reproduction and creation of digital media, including digital content production and creative services that rely on digital tools.
- **IT services:** Technical services and digital infrastructure that underpin and support the operation of digital systems, including software development, data processing and hosting, and telecommunications services.

Digital and technologies activity accounts for 3.3% of total employment and 6.5% of the region's business base, comprising 4,590, largely SME businesses. The sector generates £2.1bn in GVA, indicating high value intensity relative to employment, with productivity levels around 25% above the national average. Although the sector remains less concentrated locally, it continues to grow, with increasing economic significance generating spillover impacts in the wider economy.

25,380
Employment
1.9% CAGR

4,590
Businesses
-1.9% CAGR

£2.1bn
Gross Value Added
6.0% CAGR

£84,905
GVA per job
4.0% CAGR

0.78
Average Concentration
0.5% CAGR

Source: Metro Dynamics analysis of ONS regional GVA datasets, ONS Business Register and Employment Survey (2017 and 2023) and ONS UK Business Counts (October 2025).

Distinctive features of the Digital & Technologies sector in Kent and Medway

The sector stands out for its distinctive combination of digital services, creative capabilities and specialised electronics manufacturing, which is relatively unique in the South East. This mix reflects Kent and Medway's operational and production geography and underpins opportunities to improve productivity and support digital transformation across the wider business base.

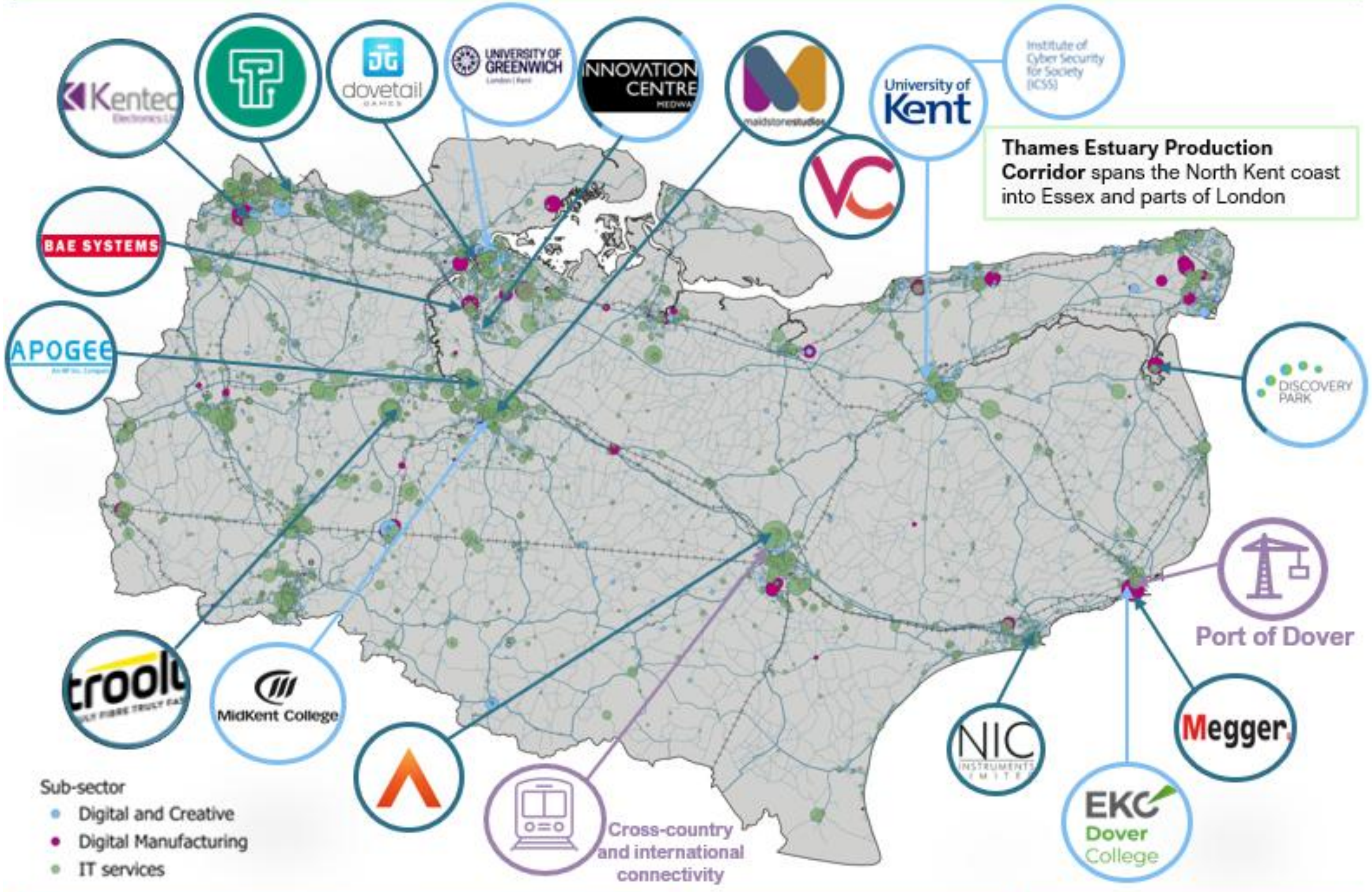
Kent and Medway has an extensive base of creative industries activity, organised around more than 40 locally embedded creative micro-clusters, reflecting distinctive place-based opportunities of creative activity.

The ecosystem is anchored by a small number of major digital and electronics employers, alongside a large SME base. Employers including Kentec Electronics and Megger anchor advanced electronics, secure systems and export-facing manufacturing activity, supported by sector-focused software and IT services providers that operate at a national scale.

Strong local demand from sectors undergoing significant digital transformation, including ports and logistics, agri-food, energy, defence and health, provides clear routes to application and commercialisation. Combined with proximity to London and Europe, high-speed rail, ports and international connectivity, these characteristics position Kent and Medway as a distinctive environment for developing, testing and scaling digital and technology solutions in live operational contexts.

Kent & Medway's Digital & Technologies Sector Ecosystem

A diverse ecosystem of micro-clusters, anchor employers and supporting infrastructure to connect innovation activity to wider UK and international markets.



Actors & Assets		Infrastructure	Enablers
A dispersed mass of SMEs and major digital and technology employers anchoring activity across the value chain within Kent and Medway.	Key anchor FE & HE institutions, and supporting innovation assets, underpin a supply of talent, skills and knowledge.	Strategic gateway and rail infrastructure linking digital and technology activity to the rest of the UK and enabling export-facing growth.	Networks, collaboration and knowledge exchange that connect dispersed micro-clusters and support business formation and growth.

Digital and technology ecosystem organised around multiple, locally embedded micro-clusters, supporting the complete value chain.

Source: Metro Dynamics analysis of Data City data

Summary Findings

Scale

An expanding sector that is highly valuable and productive, and a key enabler of growth across Kent and Medway's wider economy. Digital manufacturing is a highly concentrated specialism locally, supplying inputs across the digital and technologies sector and wider industries, supporting the region's professional services business base. Creative digital activity is growing at a significant rate, and complements a large supporting IT service base to drive innovation and productivity growth as critical inputs into other digital activities, defence, and health.

- **Digital manufacturing** is **22%** more concentrated locally than nationally
- Roughly **40 micro clusters** of creative industries activity span the county
- **10** of the 13 **local authorities** are experiencing overall **growth** in the sector

Infrastructure

Digital and technology businesses require a broad mix of space, and are more likely to use retail space than regional average. Units generally lower quality and smaller, likely driven by a smaller share of data centres locally. At the local authority level digital connectivity lags other areas and a lower share of premises have Gigabit availability, with considerable variation within the region. Digital exclusion risks that are high in parts of the county act as a barrier to growth in places. Constraints around grid connections and electricity supply may also influence the location and scale of future digital growth, particularly for energy-intensive uses, such as data centres.

- **0%** of occupied office space and **13%** of industrial space is **Grade A,** significantly lower than regional average of 30% and 47% respectively
- Only **79.8%** of premises have gigabit availability

Future Trends

Business activity is increasingly shaped by digital-first and AI-enabled operating models, rising automation and data-driven service delivery, extending into wider regional operations. Demand for digital skills and digital service adoption continues to rise, while sustainability pressures are driving interest in green innovation and digital infrastructure. National digital policy, post-Brexit conditions and an evolving regulatory environment linked to technology change are shaping how the sector operates and trades.

- **Digitalisation** is a cross-cutting skills priority across **all LSIP priority sectors**
- Growing demands and requirements for digital capabilities across other focus sectors, and large local employers

Summary Findings

Innovation

Compared to the Kent and Medway and national average, businesses show higher engagement in R&D spending and grant receipts, though this lags the national digital benchmark. Since 2022/23, the region has secured £21.1m in Innovate UK funding, supporting secure data and communication security, with applications increasing efficiency in wider sectors such as health. Universities, and specific strengths at the Institute for Cyber Security and Society, further embed digital innovation across health and adjacent sectors.

- **53%** higher concentration in Electronics manufacturing than nationally
- Many businesses engaging in **emerging economy activity**, with a large base of **cloud computing (42%)** and **cyber (37%)** activity that is highly specialised

Enterprise

The business base is predominantly micro businesses, mostly operating as private limited companies with low levels of parent-company ownership. Compared to the wider regional and national economy, the sector has fewer newly established and long-established firms; sector activity is concentrated at seed and venture stage, with significantly fewer firms reaching growth stage than regional and national averages. Locally fewer scale-ups that the national sectoral benchmark. The sector has higher engagement in equity funding than the county average, but this lags the UK sector rate.

- **44%** of businesses established in the last five years
- **62%** of businesses at **seed/venture stage**, and just **15% established**
- Average and medium deal size **25%** smaller than national sectoral average

Human Capital

Relatively high skilled workforce, though fewer high skilled occupations locally than nationally. Employment significant in programming and software development, with the highest relative concentrations in computer system and equipment installers, manufacturing directors and managers, and IT operations technicians. Job adverts have seen a decline in recent years, aligned with regional and national trends. Digital competency is becoming increasingly embedded in skills training, but a large SME base makes workforce training more challenging amid high demand.

- **77%** of occupations are **high skilled,**
- **29 job vacancies** per 100 jobs, compared to **25** in the UK
- Computer system (**72%),** and telecoms (**32%)** equipment installers and servicers highly concentrated locally

Considerations for Local Growth Plan

Enterprise	Innovation	Human Capital	Infrastructure	Future Trends
Connecting different parts of the sector to support linkages across the full value chain. Improve access to finance by strengthening links to investors, raising the visibility of the sector opportunities in Kent and supporting businesses to identify and secure the right forms of funding for their needs, from early seed to larger equity or debt fundraisings. Tailored business support for nascent firms and clusters.	Support cross sector innovation between digital firms and other priority sectors Create spaces to enable collaboration and innovation with a focus on delivering the right equipment and opportunities, flexibility and accessibility.	Leadership and management skills to enable digitalisation across the economy to increase productivity and drive demand for digital services and tech.	Improving speed and reliability of connectivity. Promote the development of high spec industrial and commercial space to meet the sector needs.	Delivering energy supply and access to the connectivity and infrastructure that will be required for future technologies like developing AI, quantum etc. Building local capability to meet the demands of accelerated digitalisation of other key sectors, and major infrastructure.

Support the development of clustering around major anchors, creating focus points for the sector.
Work to align the ecosystem around a shared narrative for growth focused on increasing collaboration between manufacturer, hardware and software & creative firms, as well as extending the reach of the sector into other parts as a key enabler for growth in other sectors.

Energy

Description of the sector

The energy sector in Kent and Medway covers the whole chain of activities that allow energy to be produced, transported, and delivered/consumed.

Although relatively small in employment terms, it plays a vital enabling role across the broader economy. The sector also closely aligns with national priorities on energy security and the transition to cleaner, more efficient energy systems.

Kent and Medway is one of the UK's most strategically significant energy clusters, combining nationally critical gas import capacity, major cross-border electricity interconnections, substantial generation, and high-capacity transmission infrastructure.

There has been strong growth in activities linked to generation and the distribution of energy but less so in transmission and in the manufacture of related equipment (generally one of the most employment intensive parts of the sectors).

Energy is a smaller employer, accounting for less than 0.5% of total employment (2,840 jobs) but employment is high value, at an estimated £198,485 GVA per job, over 3 times the regional average. Business numbers are growing faster than the national average and the level of concentration is increasing.

2,840
Employment
-2.4% CAGR

80
Businesses
4.2% CAGR

£564m
Gross Value Added
0.5% CAGR

£198,485
GVA per job
3% CAGR

0.66
Average Concentration
4.7% CAGR

Source: Metro Dynamics analysis of ONS regional GVA datasets, ONS Business Register and Employment Survey (2017 and 2023) and ONS UK Business Counts (October 2025).

Distinctive features of the Energy sector in Kent and Medway

Kent & Medway host several of the UK's most strategically important energy assets, including major gas import terminals and cross-border interconnectors that directly support national energy security. These assets place the region at the centre of the UK's energy system and shape planning for resilience, storage and system balancing.

Kent and Medway is one of the UK's most strategically significant energy clusters, combining nationally critical gas import capacity, major cross-border electricity interconnection, substantial renewable generation, and high-capacity transmission infrastructure.

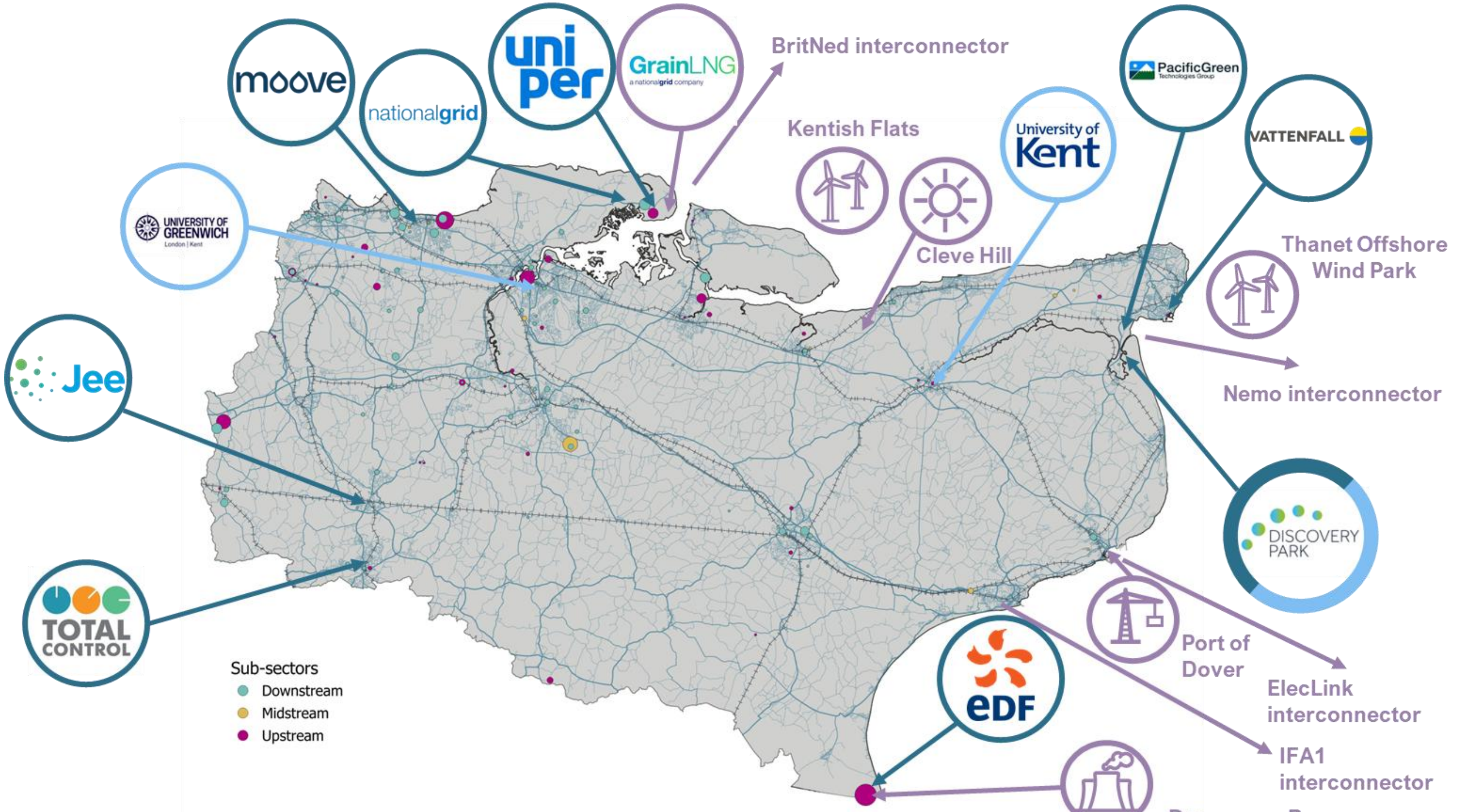
The region has an unusually diverse and large-scale energy mix, spanning gas-fired generation, offshore wind operations, biomass, waste-to-energy, solar, and emerging storage technologies, as ongoing nuclear operations at the decommissioning Dungeness plants. This portfolio creates a broad and flexible foundation for innovation, system testing and supply-chain activity.

The county also benefits from some of the highest solar irradiance levels in the UK, giving it a natural advantage for solar generation and co-located technologies such as battery storage. This strengthens its position in the national transition toward more distributed and renewable energy.

The concentration of industrial sites, port infrastructure and energy-intensive activity creates strong potential for hydrogen production, storage and distribution. The region's industrial clusters and transport corridors offer practical contexts for early adoption of hydrogen in freight, maritime operations and construction, and support pilot projects exploring low-carbon fuels at scale.

Kent & Medway's Energy Sector Ecosystem

Kent and Medway has the critical assets and business base to make it a growing innovation cluster



New, hybrid indicators NeuConnect, Nautilus and Sea Link are in development

Actors & Assets		Infrastructure	Enablers
A critical mass of geographically and economically proximate firms with many specialising in emerging sectors	Key anchor, HE & FE institutions and supporting organisations & a supply of talent, skills and knowledge	Physical (transport, road networks, energy systems) and digital assets that support the flow of ideas	Investment capital to take risks and to fund research/expansion and a supportive policy environment

Networks to share information and knowledge, coordinate activities and promote a shared innovation culture and wider regional linkages.

Summary Findings

Scale

The energy sector is of major strategic importance nationally, bringing together critical infrastructure and capabilities. Though it is relatively small in terms of jobs and businesses it is a highly productive part of the Kent & Medway economy, acting as an important enabler for wider industrial activity. Its performance trends show steady strengthening in key areas, reinforcing its strategic role in the region. The asset base presents opportunities for co-location of assets, firms and developing industrial symbiosis.

- The sector has an average productivity of nearly **£200,000 GVA per job.**
- Strong in the **production of electricity**, which has a **57% higher concentration.**
- Growing number of **businesses** at **4.2% CAGR**

Infrastructure

Kent & Medway's energy system is underpinned by nationally significant assets but faces growing pressure from ageing networks, rising demand and local grid constraints. Future growth will depend on coordinated upgrades, improved digital systems and the provision of suitable industrial land for emerging technologies.

- **34%** of space occupied by energy businesses are classed as **Grade A**, nearly double the regional average.
- Key projects include **Nemo Link Interconnector, Richborough energy park** and multiple **wind** and **solar** farms.

Future Trends

The sector is set to be reshaped by decentralisation, digitalisation, changing nuclear landscape, net-zero regulation and growth in renewables, alongside demand for cleaner and more resilient energy. These shifts will require adaptation in business models, skills and planning to position Kent & Medway for long-term competitiveness.

- Hydrogen technology has started development in 2025.
- Offshore wind expansion creates a 40GW of wind energy target.

Summary Findings

Innovation

Concentration of businesses active in energy generation of distribution tech.
Scale of assets and requirements create strong demand for innovation that could be leveraged into greater activity, strengthening clusters of complementary activity, shared needs etc.

- **1.61%** of businesses report spending on **R&D**, compared to **0.35%** on average. **1.15%** have received **an R&D grant**, compared to **0.61%** on average.
- A high share of innovate UK projects in Kent and Medway relate to energy.

Enterprise

The business base is small but diverse, spanning micro-firms to internationally linked operators, with increasing activity in R&D, clean energy technologies and early-stage ventures. Patterns of establishment, investment and business evolution suggest an ecosystem with emerging strengths but needing targeted support to scale.

- Just **70%** of businesses are classed as **'micro'**, which is less than comparators.
- **16 rounds** of equity funding per 1000 businesses, higher than the **11** average, but **median value** is almost **half** the average.

Human Capital

The sector relies on a broad and technically skilled workforce, with a strong presence of engineering and professional roles. Skills needs are shifting as technologies evolve, requiring ongoing upskilling in low-carbon systems, digital capability and specialised technical fields.

- **58%** of workers are **high-skilled**, more than the national average for energy.
- Jobs demand is high, with energy **job adverts** accounting for **35% of all jobs**.
- High concentration of **production managers** and **electrical engineers.**

Considerations for Local Growth Plan

Enterprise	Innovation	Human Capital	Infrastructure	Future Trends
Define a clear strategy for business attraction linked to energy availability, positioning energy generation as a tool to pull in high-demand sectors.	The question for the LGP are if there ‘big plays’ for new energy generation, emerging technologies that K&M want to pursue? If so – what are the national policy barriers to influence, how do you maximise local benefit	Build pipeline of technical skills to meet changing requirements. Explore option to leverage existing skills mix to establish role as an energy skills and capabilities hub – with expertise across gas, nuclear, solar, wind etc present in the region.	Addressing grid limitations is a central condition to unlock further growth and accelerating decarbonisation. Future developments may require improved digital connectivity. Support the opportunity to deliver carbon pipeline around the Medway CC cluster.	Major power demands are and important enabler for capital intensive investments in new energy like hydrogen schemes, CCUS, new nuclear. Explore opportunities to deliver cheaper, more reliable energy.

Develop a coherent approach to maximising local benefit from large projects (interconnectors, offshore wind repowering, storage), including supply chain, skills and co-location opportunities.
Seek to influence Regional Energy Strategic Plan to ensure full scale of the needs and the opportunities are reflected and considered.
Advocate for a place-based approach to grid planning, identifying where local generation can meet local demand (e.g., Dover, North Kent, Thames Estuary) to reduce costs and accelerate electrification.

Reflections

Kent and Medway's growth opportunity lies not simply in its sector strengths and assets, but in its ability to connect them across sectors, across places and across partners. By building the networks, confidence and collaborative systems required, the Local Growth Plan can turn individual projects into catalysts for long-term transformation.

Our reflections on a growth model for Kent and Medway

A key question as we have delivered the sector research has been what the right approach to deliver growth is for Kent and Medway, our reflections on this are included here for KMEP to consider as it moves to the next phase of developing the local growth plan.

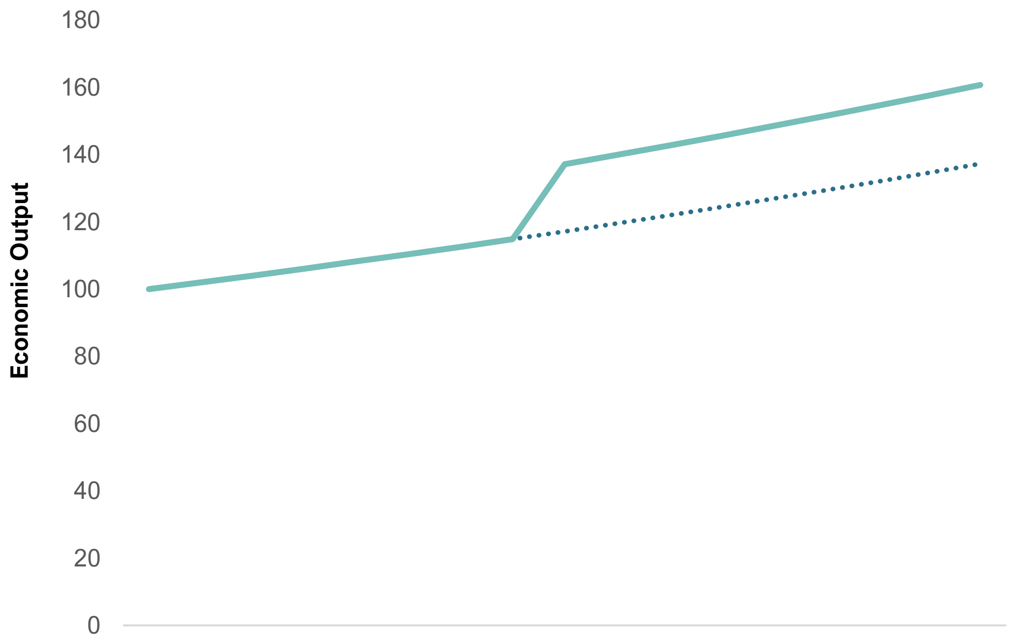
A core question for the Local Growth Plan is, along with the sector opportunities and the investment pipeline, what is the overarching theory of how transformative growth can be delivered here. Kent and Medway's polycentric geography means that the city led growth models based on prioritising economic concentration in dense urban centres, using agglomeration effects, land-use intensification, and transport connectivity to drive productivity growth are an unlikely route to success.

Fragmentation across the economy, the scale of the area and the challenges in forming a clear, shared narrative all make it difficult to articulate Kent and Medway's wider role and its economic opportunity, both internally and to external stakeholders and government. The Local Growth Plan is a chance to change this, setting out a clear, place-based growth model founded on some of Kent and Medway's core comparative advantages.

Research, engagement and existing strategy documents consistently highlight the importance of Kent and Medway's asset base locally and nationally. The rationale for and strengths of three of the four opportunity sectors is grounded in these assets – such as the natural endowment of its geography, climate and land quality, its infrastructure across ports and energy and the proximity to London. Across the region, infrastructure, science parks, universities and other anchors shape where and how economic activity occurs. Looking forward, a series of major set-piece projects and required investments (ranging from those already in development to those still emerging) will further build on this asset base.

Models of asset-driven growth

Kent and Medway's unique opportunity is to deliberately leverage major assets and upcoming investments so they generate wider economic spillovers. By creating the right enabling conditions, set piece projects such as the Lower Thames Crossing, the electrification of Dover and other ports, CCUS schemes, Sevington, and new interconnectors can act as inflection points in the area's economic trajectory.



The goal is not to raise the level of output through one-off gains, but to increase the long-term growth rate by using set pieces to drive productivity improvements, stimulate innovation and enable wider sector transformation.

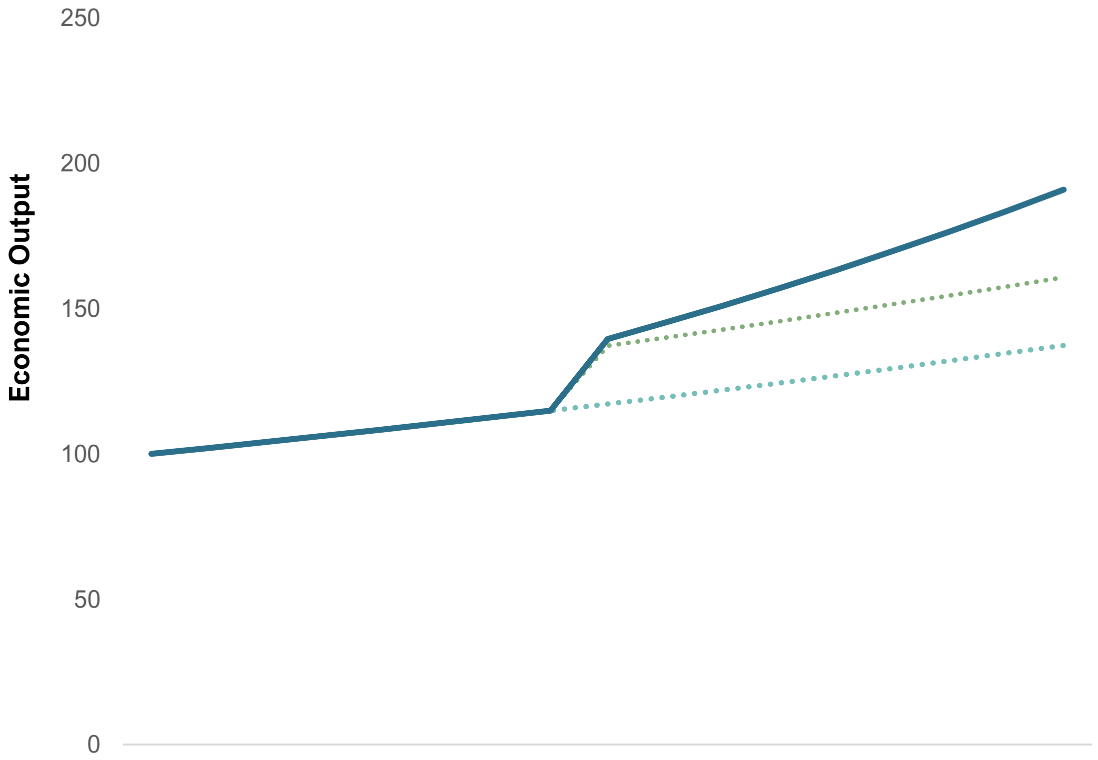
At a very basic, theoretical level a major project can impact growth in two ways:

- by raising the level of output, or
- by changing the path that growth is on.

The chart on the right illustrates a scenario where an investment increases the level of output but does not alter the underlying growth rate. The project delivers an initial uplift (for example, increased employment or new equipment increasing GVA) but the economy then continues along its previous trajectory. In this case, the project does not trigger wider gains in productivity, innovation, supply chains or local capability.

Kent & Medway’s Growth Opportunity

Transformative growth will come from ensuring that new and existing assets are integrated in the wider economy so that their presence creates positive spillovers and enables higher growth rates in other sectors. The ambition is to ensure that they act not just as a one-off positive shock, but as an inflection point for the local economy, shifting it onto a higher lang term growth path.



The key growth opportunity for Kent and Medway is to create the conditions in which its assets and the pipeline of in progress, planned and required investments act as catalysts for a higher growth rate. These set-piece projects can generate positive spillovers by improving productivity, increasing employment in other sectors through supply-chain effects, and acting as demand sources for innovation and new technologies.

A central organising question for the Local Growth Plan would therefore be: which strategic projects, future needs and existing assets can be leveraged to shift Kent and Medway onto a higher growth trajectory and what must be put in place to maximise these opportunities.

Delivering the Growth Opportunity

To maximise the additional growth impact from Kent and Medway's asset base the next phase of the Local Growth Plan should focus on creating the conditions that turn assets into a system, rather than isolated advantages.

Purposeful networks to overcome fragmentation	Fragmentation across Kent and Medway is a barrier to the ability of assets, sectors and institutions to reinforce one another. Creating stronger, more flexible networks across a polycentric geography to connect organisations that currently operate in parallel and enable faster knowledge-sharing, problem-solving and collaboration across places and sectors will be the foundation for a growth model that seeks to leverage interdependence, not isolated strengths.
A shared mission for growth to convene partners	A clear, widely understood narrative is essential. The county already has strong convening power to establish a shared vision for what growth in Kent and Medway should look like and then to align policy levers and investment behind specific projects. This will provide the confidence, coordination and momentum required to maximise spillovers into supply chains, skills development and innovation activity.
Project based collaboration to maximise impacts of assets	Major projects like Lower Thames Crossing, port electrification, Sevington, interconnectors and potential energy projects will only shift the long-term growth trajectory if they become platforms for innovation and supply-chain development. This will require collaboration to develop ways to promote local supply chain participation (both in delivery and ongoing operations), embed technology adoption into infrastructure delivery and management, turn assets into testbeds and demonstrator environments for innovation, etc.
The right space in the right place	Ensure there is supply of the right types of commercial space in the right places: To unlock the interconnected growth opportunities across sectors, Kent and Medway will need a mix of affordable start-up space, grow-on space, labs, studios and flexible facilities located where businesses operate. Aligning space provision with sector geographies and cross-sector clusters is essential so that firms can co-locate, collaborate and scale. As part of this mix it will be important to create recognised hubs for sector and cross-sector activity, raising the visibility of opportunities and creating platforms to explore collaboration.

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