Plymouth City Council

PORT OF PLYMOUTH MASTERPLAN EVIDENCE BASE STUDY

PORT OF PLYMOUTH STUDY

Purpose of the Study

Evidence Base for:

- Port Masterplan
- LDF Core Strategy Review and AAPs
- LES Review
- LTP3 & Delivering a Sustainable Transport Strategy

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Work of the Study

Baseline analysis:

- Existing activities, assets, capacity, operating environment
- Constraints, opportunities and issues

Site visits and Stakeholder interviews

SWOT Analysis

Scenario development

Stakeholder workshop

Recommendations

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Stakeholders Consulted

Cattewater Harbour Commission
Cattedown Wharf
MoD
NHNB Devonport
Plymouth City Council
Plymouth Yacht Haven
Pomphlett Wharf
QHM
Queen Anne's Battery Marina
Sutton Harbour Company
Sutton Harbour Marina
Tamar Estuaries Consultative Forum
Victoria Wharf
Associated British Ports

Chamber of Shipping
Department of Communities
Devon County Council
Environment Agency
Marine and Fisheries Agency
Maritime Plymouth
Natural England
Network Rail
Plymouth City Development Company
Plymouth Chamber of Commerce and Industry
Plymouth University
Princess Yachts
Regen SW
South West RDA

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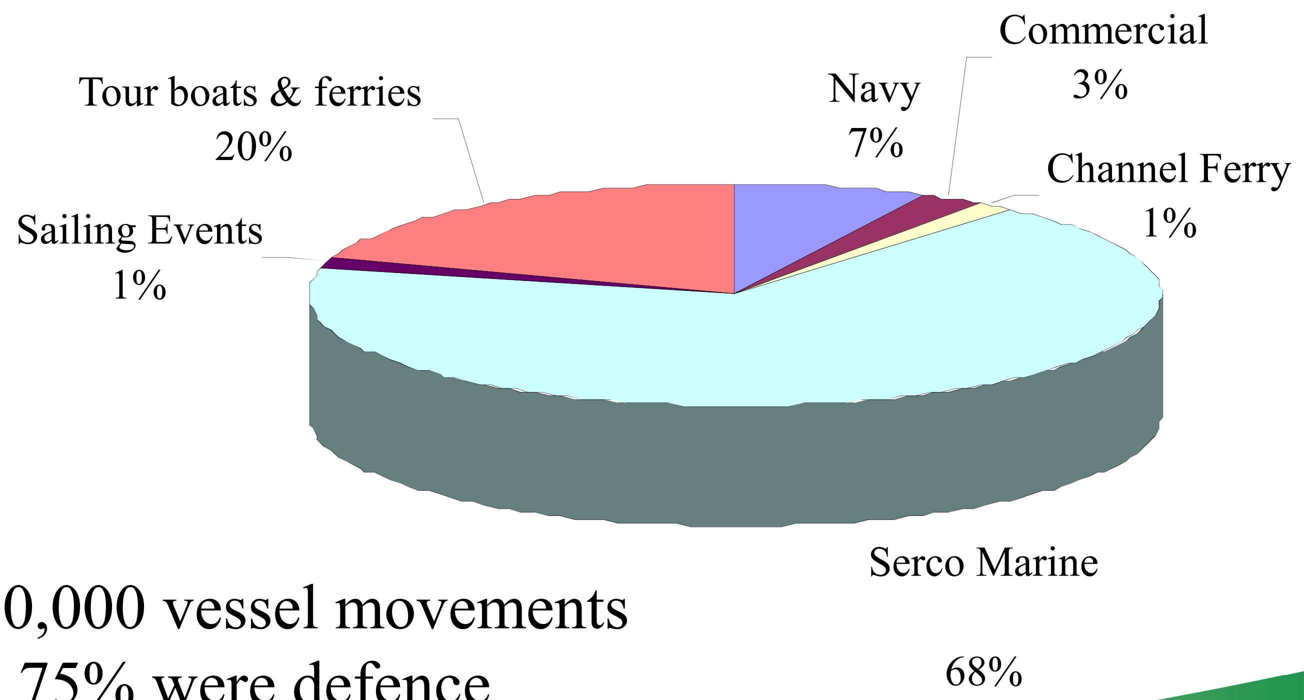
Vessel movements in Plymouth 2009



Of the 60,000 vessel movements in 2009, 75% were defence related

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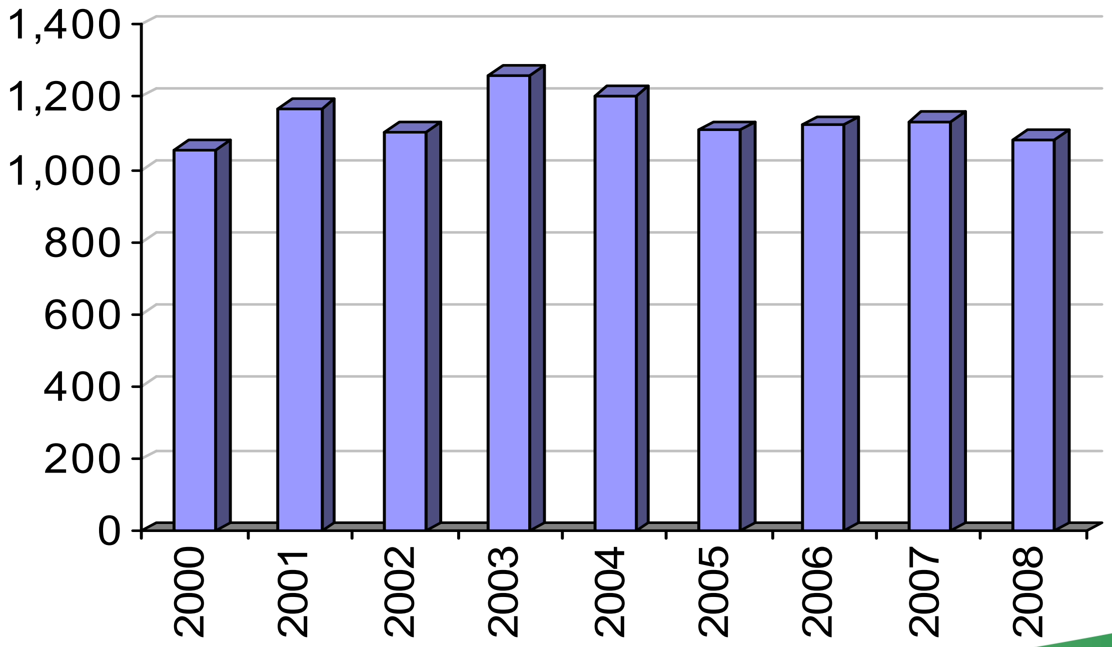
Ship Arrivals at Plymouth: 2000-2008



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Ship Arrivals at Plymouth, by type and deadweight: 2008

Deadweight Tonnes	1 - 4,999	5,000 - 19,999	20,000 - 99,999	All
Tankers	57	155	3	*215*
Ro-Ro vessels	487	-	-	*487*
Fully cellular container vessels	13	2	-	*15*
Other dry cargo vessels	333	35	-	*368*
Total all vessels	**890**	***192***	***3***	***1,085***

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Cargo Type	Direction	Market	Outlook
Liquid Bulk			
-Oil Products	Inward (coastal shipping)	Far South West (Cornwall & Devon)	Stable
Dry Bulk			
-Animal Feed	Inward (from Rotterdam)	Local/Regional	Stable; seasonal
-Fertiliser	Inward (from Rotterdam)	Local/Regional	Stable; seasonal
-Ball Clay	Outward	Europe (Spain)	Declining
-Stone	Outward	Channel Islands, SE England	Stable
-Stone	Inward (from Ireland)	Local/Regional	Stable
-Cement	Inward (from Germany)	Local/Regional	Stable
-Salt	Inward	Local/Regional	Growing
Fish	Inward	National	Declining
Ro-Ro HGV	Inward (mainly)	Regional/National	Stable

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Economic Impact

	Plymouth	Plymouth TTWA
Direct Employment:		
Total Number	13,500	
Percentage of workforce	12%	10%
Devonport related	8,500	
Indirect Employment:		
Total number	3,400 – 6,800	
Percentage of workforce	19%	14%
Value:		
Contribution to GDP	£1.7billion	
Contribution to GVA	£1billion 25%	

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Key Strengths:

- Well established and diverse port
- Relatively deep water & natural harbour
- Major cluster of marine businesses - Devonport, boat building, R&D, fish market, marine services
- 12% Plymouth employment dependent on marine sector
- Major marina / waterside leisure location
- Minimum coastal erosion / flood risk

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Key Weaknesses:

- Water depth at low tide & navigational constraints
- Serving largely local and regional commercial markets
- Limited mix of cargos - no containers
- Peripherality
- Lack of single ‘champion’ for port interests
- Rail - restricted loading gauge - limited intermodal container traffic
- Limited local rail freight facilities at the Port
- Loss of waterside land for higher-value uses

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Key Opportunities:

- High level of planned population & employment growth
- Expansion of oil-related cargoes
- Growing demand for marina / leisure based activity
- Strong policy support for sustainable freight transport (including short-sea shipping)
- Growth in demand for cruise
- Need to accommodate requirements to service marine renewables sector
- Potential release of vital port infrastructure at Devonport
- Feeder container market?

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Key Threats:

- Small / self-contained market
- Competition for limited cargoes
- Competition for cruise (e.g. Falmouth)
- Economic & supply-chain implications of SDR – Devonport
- Need for infrastructure investment at Devonport
- Devonport listed buildings
- HSE Blast zone
- Lack of public funding for ports development
- Loss of key waterside sites to non-port uses
- Limited expansion capacity at Cattewater & Sutton Harbour
- Rail access to Cattewater mothballed
- Port expansion constrained by local and regional transport networks

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SCENARIOS DISCUSSED BY THE STAKEHOLDERS

- **Scenario 1** Safeguard existing position / business as usual
- **Scenario 2** Targeted diversification
- **Scenario 3** Managed contraction of commercial port facilities & enhancement of leisure role
- **Scenario 4** Major step change / re-use of Devonport land and waterfront
- **Scenario 5** Radical restructure

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Progress to a full Masterplan - options:

- Take no further action - an opportunity missed
- PCC driven and funded M’plan - discounted
- Private sector funded M’plan - discounted
- Develop a Coastal/Marine SPD as a de facto plan for the port and the surrounding maritime environment
- Any others?

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Recommendations and Next Steps

- Masterplan Preparation/Coastal Action Plan
- Safeguarding Marine Employment Sites
- Raising the Profile of the Port - a ‘Champion’
- Cruise Market Feasibility/Action Plan
- Skills and Training Investment
- Planning for Climate Change
- Safeguarding Cattewater Branch Line Track Bed

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