Peninsula Transport
Transforming the economic performance of the south west

Western Gateway
Sub-national Transport Body

South West Freight Strategy

Port Dashboard – Falmouth

Peninsula Transport & Western Gateway Sub-national Transport Bodies

WP12 International Gateway Study

Gateway	Falmouth	**Type**	Port	**County**	Cornwall
Operator	A&P (FDEC)	**Size**	30 hectares	**Employees**	17 Tenants

The Port of Falmouth is located within the Fal Estuary, the third deepest natural harbour in the world. Falmouth Docks and Engineering Company (FDEC), part of the A&P Group are the statutory port authority with responsibility for the docks and working closely alongside Falmouth Harbour Commissioners, the trust port overseeing the inner harbour up the Penryn River (as far as Boyers Cellars), the southern part of Carrick Roads and a large part of Falmouth Bay. Falmouth is the westernmost port of its size and scale on the British mainland and a strategic location for vessels entering or exiting the transatlantic sea and English Channel.

Freight Markets	Tonnage (2018)	152,000 (DfT)	Emerging Markets			
Bulk Fertilisers (Import)	Animal Feed (Import)	Recyclables (Export)	Aggregates (Import/Export)	Biomass (Export)	Renewables (Import)	LNG (Import)

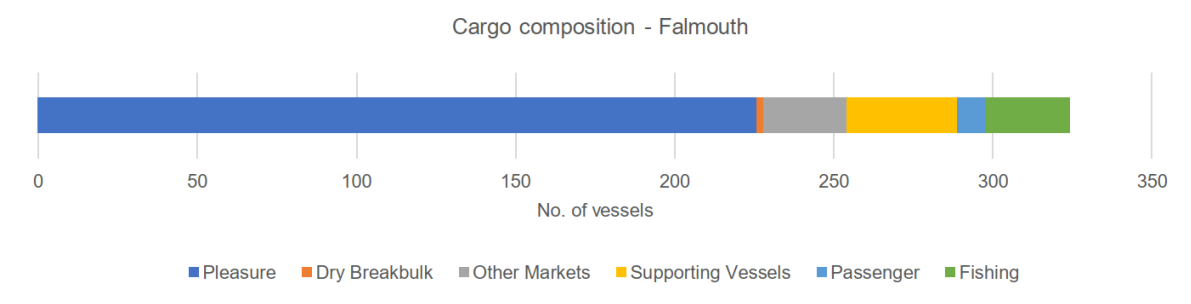
Description	The Port of Falmouth serves a small number of freight markets with strong links to the local economy. Imports of goods primarily serve the large agricultural sector in the region whilst the port is a key component on Cornwall's sustainable waste management supply chain moving glass and similar materials to mainland Europe. There are also emerging market areas namely the movement of aggregates from local quarries for coastal shipping and pilot initiatives for floating offshore windfarm infrastructure in the Celtic Sea/English Channel.

Passenger Markets	People (2018)	15,663 (DfT)	Berths/Docks	4 (Operational)

Cruise Services (Itinerary)	The Port of Falmouth caters for passenger cruises with dedicated landing facilities and ship berths (to cater for 223-240 metre classes) within close proximity to the town. The vast majority are itinerary/transit services berthing for a day before heading to other destinations or ports, such as Dover or Southampton. Approximately 35 cruises visited per annum pre Covid. Passengers (typically with higher disposable incomes) staying and visiting the town or/and local attractions such as the Eden Project. This is growing annually; A&P, who are responsible for overseeing cruise ship operations, are also increasing turnaround activity (embarkation/disembarkation). The cruise services include: • Viking Cruises (Bergen-Barcelona). • Fred Olsen Cruises (France, Ireland and UK only Itineraries).
Local Ferries (Estuary Trips)	The local ferry (Fal Ferries) run on seasonal timetables (seven days a week): • King Harry Ferry (Feock-Philleigh), Every 20mins, 10 min duration • St Mawes Ferry (Falmouth-St Mawes), Every 90mins, 20min duration • Enterprise Boats (Falmouth-Trelissick), Every 2hours, 50min duration • Place Ferry (St Mawes-Place), Every 2hours, 10min duration • Flushing Ferry (Falmouth-Flushing), Every 90mins, 10min duration

Port & Industry Operations	This is what takes place on site or/and the immediate hinterlands				
Vessel Repair (A&P Group)	Yacht Builders (Pendennis Ltd)	Fuel Bunkering (Azure Oil Services)	Cargo Handling (A&P Group)	Quays Storage (A&P Group)	Towage (A&P Group)

Port cargo composition (5th July-25th June 2022)[1]

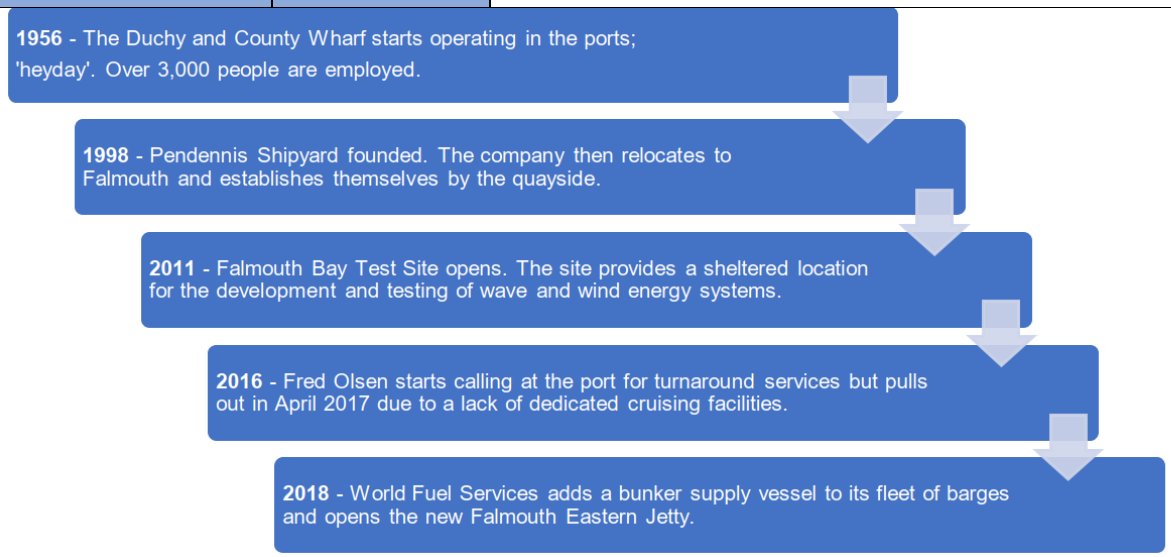


[1] https://www.marinetraffic.com/en/ais/details/ports/747?name=FALMOUTH&country=United-Kingdom

Description	The Port of Falmouth is home to the UKs largest ship repair complex and a diverse range of local companies under the auspices of the Cornwall Maritime Enterprise Zone. These provide a range of revenue and workstreams annually throughout the year and contribute towards local skills development and servicing the local economy. LNG bunkering facilities, contracted by Falmouth Petroleum Limited at the Falmouth Anchorage, serve vessels moving through the English Channel and not at quayside. South-West Water also have a facility on site adjacent to oil bunkering facilities and a centre of excellence has also been established to serve the Ministry of Defence contractual workstreams.			
Connections	Road Link	A39 (Melville Road)	Rail Link	Falmouth Dock (Passenger)
Rail Services	GWR - Truro to Falmouth Branch Line (Every 30min Monday-Saturday & Hourly Sunday).			
Bus Services	GoCornwall - Service 67 (Falmouth Town Centre (Hourly Monday-Saturday).			

The Port of Falmouth can be accessed by the A39 (Melville Road) for HGV movements servicing the port environment and for passengers seeking to access the terminal facility. This requires navigating through the town and mixing with local traffic travelling between quayside and the A39 north of Penryn. The port is exploring the viability of reinstating the rail link into the quayside for shifting goods from road to rail. Falmouth Dock Station (Patronage of 96,726 in 2018-2019) sits adjacent to the port site and is the terminus for the line.

Investment Timeline	1956 - 2021



Future developments

- It is anticipated that the turnover and personnel count at the Falmouth Docks will increase by up to 80% as a result of Pendennis Shipyard's recently announced expansion of business. The provision of Superyacht-specific amenities is necessary for this expansion.[2]
- Currently, France, the Baltic, Scandinavia, and the Rotterdam region provide the majority of imported petroleum cargoes. Brazil, which is very advanced in manufacturing low/no sulphur distillates, may supply considerably more in the future. Larger ships (such as Panamax) than those currently in use would be required for this. Even though Falmouth Petroleum Ltd. had a 15,000-tonne tanker, larger ships would import petroleum from countries like Brazil.[3]
- Future dry bulk cargo volumes are not anticipated to increase significantly as a whole because they are all strongly correlated with the size of the regional economy, and the Port is anticipated to maintain its niche position.[4]
- Falmouth Harbour Commissioners have plans to expand the number of berths in Falmouth by 80.[5]

SWOT Analysis

Strengths

- Falmouth is an attractive Port because it provides deep water access to Falmouth Bay and can (in theory) accommodate the largest vessels (which are increasing in size and capacity).
- Falmouth is well placed geographically for transit (call-in) cruises, including new transatlantic markets and is only one day/night steaming away from cruise ports along the South-East of England.
- Falmouth Docks represent a unique buoyant business cluster of different sectors, such as ship repair, bunkering and yacht building; with potential to build on the enterprise zone designation.
- The port has close connections with the local economy and major sectors (agriculture, energy, waste) which are stable and growing commodity flows in the near future.

Weaknesses

[2] https://planforfalmouth.info/wp-content/uploads/2016/12/Falmouth-Harbour-Masterplan.pdf
[3] https://planforfalmouth.info/wp-content/uploads/2016/12/Falmouth-Harbour-Masterplan.pdf
[4] https://planforfalmouth.info/wp-content/uploads/2016/12/Falmouth-Harbour-Masterplan.pdf
[5] https://planforfalmouth.info/wp-content/uploads/2016/12/Falmouth-Harbour-Masterplan.pdf

- Whilst the port is plugged into the A39, traffic mixing takes place (HGVs and private vehicles) for local and strategic journeys which impacts on congestion and air quality.
- There is a need to improve first and last mile connectivity between the port and the railway station (Falmouth Docks) including enhanced wayfinding and legibility – especially to cater for future growth.
- The proximity of the port to residential areas limits growth potential and can lead to conflicts over land safeguarding and development of new technologies (e.g. LNG bunkering/Ammonium Nitrate Storage).
- Limited infrastructure and provision for embarking/disembarkment of cruise ship passengers and ability for promoting and supporting increased number of people staying and moving around the town.

Opportunities

- There is a long-term opportunity for the port to service the renewable energy sector in its different guises; especially transporting offshore wind farm materials and servicing related vessels.
- The Crown Estate is releasing 4GH of sea-bed estate by 2035 to accelerate offshore wind power development (especially in light of energy crisis), with the port helping deliver turbine parts and maintain devices.
- There are a plethora of tourist attractions within accessible distance (one hour) of the port (compared to competing ports) which would benefit from cross promotion and integrated travel offerings.
- Berth a cruise liner at the port to provide floating hospitality for the core summer season to help address accommodation shortages in Cornwall (estimate hosting 200,000 per annum). Need to consider shore power.
- Coastal shipping, using zero emission vessels, is potentially attractive for export of aggregates to other parts of the UK to remove HGV traffic on the road network (with the port potentially having a rail terminal).
- FDEC has received interest from Bulk cargo and project cargo customers to re-open the rail link into the docks (which was removed in 2014). Network Rail are interested to supporting this and commercial discussions are ongoing.
- Interest in direct sleeper rail services linked into Falmouth (Town or Dock Station) for passengers and working with Network Rail to reinstate the freight link into the port directly.
- The changes caused by Brexit and the fuel costs increases are opportunities for Falmouth to take advantage of its peninsula location in terms of proximity to shipping routes.

Threats

- Large parts of the Fal and Helford are designated as a SAC under the UK Habitats Regulations. This imposes strict criteria in relation to developments and requires plans to be “appropriately” assessed.
- Falmouth Docks and the surrounding seabed are known to have areas of historical contamination that require consideration when undertaking dredging and/or construction works.
- The growth of the cruise market will be increasingly constrained by the channel depths and issues with historical contamination of the seabed (when dredging) for larger vessels to enter the harbour).
- Currently the berths cannot accommodate the large class cruise vessels (340 metres) without expanding size of the berths. Peripherality always likely to be a challenge to serve wider UK markets.