





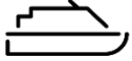
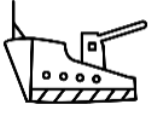

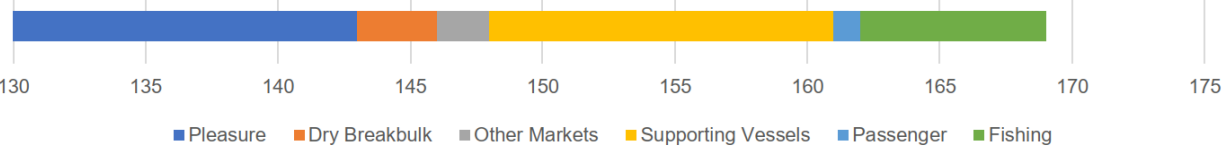


South West Freight Strategy

Port Dashboard – Fowey

Peninsula Transport & Western Gateway Sub-
national Transport Bodies

WP12 International Gateway Study

Gateway	Fowey	Type	Port/Docks	County	Cornwall														
Operator	Imerys	Size	n/a	Employees	32														
Fowey Harbour is a deep-water Lo-Lo port situated on the south coast of Cornwall. Imerys operates the dock terminals, such as Carne Point for transfer to rail (as well as those at the Port of Par) and oversees the four loading berths which primarily handle materials associated with the China Clay market alongside rock salt and aggregates. The harbour, the preserve of recreational crafts and used by cruise vessels, is located further down the Par estuary in proximity to the main settlement of Fowey.																			
Freight Markets		Tonnage (2018)	450,000 (Fowey Harbour Authority, 2020)																
 China Clay (Export)	 Aggregates (Export)	 Rock Salt (Export)																	
Description	Fowey is a critical port for the exports of bulk material from the South-West of England. Coastal shipping is used extensively with 250,000 tonnes moved annually by 120 vessels carrying between 2,000-7,000 tonnes individually. The Port of Tilbury, London is a key recipient of aggregates (150,000-200,000 tonnes annually) to serve the burgeoning construction industry. The port is one of few across the South-West of the UK with a direct rail connection. Approximately 80-90% of materials are moved by rail (by DB Cargo) with one train per day from Goonbarrow to Fowey Dock for export (to the Mediterranean and North Africa for the ceramics trade) and another service for the markets in the Midlands, particularly the potteries at Stoke on Trent. A typical train load carries 1,100 tonnes across 38 wagons (this drops to 34 wagons in inclement weather). In contrast only 10% is moved by road annually due to the limited road access and quality of rail connectivity.																		
Passenger Markets		People (2018)	n/a	Berths/Docks	4 (Operational)														
 Cruise Services (Itinerary)	The deep water harbour at Fowey is accessible in all weather and states of tide. Whilst the dockside mooring provision is limited, vessels drop anchor and rely on a local ferry to link passengers with the coastline and the town centre. Fowey welcomed five cruise vessels in 2019, carrying between 200-350 passengers. The largest vessel length that can be accommodated is 230m. The vessels must perform a three-point manoeuvre before dropping anchor for easier passage. Most services go onwards to Portsmouth, Southampton or the Isle of Wight (eastbound) or the Isles of Scilly (westbound). <ul style="list-style-type: none"> • Hapag-Lloyd Cruises (Antarctica, Artic, South America) • SilverSea Cruises (UK Domestic Stops via Southampton) 																		
 Local Ferries (Estuary Trips)	There are a number of local ferry services operating from the harbour quays, namely Whitehouse Slip, Albert Quay and Riverside Quay. These are listed below: <ul style="list-style-type: none"> • Fowey - Lostwithiel. (3 hours round trip. Timetable dependent upon tides) • Fowey – Lerryn. (2 ½ hours round trip. Timetable dependent upon tides) • Fowey to Bodinnick. All year round but services differ on seasonality • Fowey- Polperro, Polridmouth or Lantic Bay (on demand) Fowey Harbour also accommodates a range of visiting craft (7,000 through a typical pre pandemic summer period) as well as 1,500 residential vessels. Water taxis also run crews to and from visiting yachts from the Town Quay providing direct access for cruise ships passengers to town centre amenities and attractions.																		
Port & Industry Operations		This is what takes place on site or/and the immediate hinterlands																	
 Towage (Fowey Harbour Authority)	 Dredging (Fowey Harbour Authority)	Description	Fowey Harbour Authority is responsible for the overseeing the movement of passenger services across the estuary. The harbour does not offer any fuel or power supply services currently and this would typically be completely at adjacent ports downstream. It does however perform essential dredging of the estuary to allow larger vessels that need additional draft to dock. The harbour can also provide a towage service.																
Port cargo composition (5th July-25th June 2022)¹	<p style="text-align: center;">Cargo composition - Fowey</p>  <table border="1"> <caption>Cargo Composition Data (Approximate)</caption> <thead> <tr> <th>Category</th> <th>Approximate Tonnage</th> </tr> </thead> <tbody> <tr> <td>Pleasure</td> <td>130 - 143</td> </tr> <tr> <td>Dry Breakbulk</td> <td>143 - 147</td> </tr> <tr> <td>Other Markets</td> <td>147 - 148</td> </tr> <tr> <td>Supporting Vessels</td> <td>148 - 162</td> </tr> <tr> <td>Passenger</td> <td>162 - 163</td> </tr> <tr> <td>Fishing</td> <td>163 - 168</td> </tr> </tbody> </table>					Category	Approximate Tonnage	Pleasure	130 - 143	Dry Breakbulk	143 - 147	Other Markets	147 - 148	Supporting Vessels	148 - 162	Passenger	162 - 163	Fishing	163 - 168
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¹ <https://www.marinetraffic.com/en/ais/details/ports/748?name=FOWEY&country=United-Kingdom>

Connections	Road Link	B3269 / B3415	Rail Link	Par and St Austell (Passenger)
Rail Services	GWR – South-West Mainline, services towards Penzance. Nearest stations to Fowey are Par and St Austell. (Every 30min Monday-Saturday & Hourly Sunday).			
Bus Services	First Kernow - Service 24/25 (Fowey Safe Harbour Hotel) (Hourly Monday-Saturday).			

Fowey Docks is a freight only terminal. Bus services to the harbour are also limited to a tight hinterland and serve local residents and visitors arriving by land. The road access to Fowey Dock (Passage Lane) is heavily constrained and is impacted by seasonality whilst the private road (via Pinnocks Tunnel) for dock traffic between Par requires HGVs to navigate a constrained tunnel environment. Some HGVs have to use Passage Lane due to the height restrictions.

Investment Timeline 1869 - 2020

1869 - The first export of China Clay from Fowey Dock. It tended to be used as a port of refuge by vessels.

1960s - Coal was one of many imported commodities but was eventually phased out in with the last shipments made to Berrills Wharf.

1968 - The Pinnock Tunnel, the longest tunnel in Cornwall, closed to rail traffic and was later converted for dedicated use for road haulage of china clay.

2020 - Imery sign two year contract with DB Cargo to continue moving rail freight (china clay and aggregates) on the regional rail network.

2020 - Lord Berkeley submits an application to the Restoring Your Railways Programme to reintroduce passenger services on the Fowey branch line.

Future developments

- Protecting Fowey Harbour and Polkerris Harbour from inappropriate development which may detract from the local character, including the fabric of quay, slipway, jetty, wharf or public landing place is proposed as there is a strong relationship between the town, the port, the river and its estuary setting, harbour and seascape. Historically, the port and river have always influenced the development of the town over the centuries.²

SWOT Analysis

Strengths

- Fowey is the principal port used for the export of China Clay produced in Cornwall. Of the 124 ships that visited the port in 2019, 116 were for the China Clay trade.
- The dock has a well-established, well utilised rail connection in the absence of a strong and reliable road link (80-90% of total port traffic annually).
- Fowey has a strong commitment to clean technologies on site and generates over 50% of energy requirements on site through solar, wind and water energy.
- The Harbour provides an essential service to the community, the sector is closely related to the wider tourism and leisure industry by providing the infrastructure, services, facilities, and accommodation.

Weaknesses

- Demand for Filler clays produced from the Cornish pits continue to reduce but still form the bulk of the exported tonnage (it is less resilient to changes in market demand).
- The port may find it starts competing with Falmouth for cruise itinerary stops along the south coastline – the latter possessing a superior range of added value services.

Opportunities

- To complement the use of renewable energy sources in Fowey, the port is also expanding into the use of HVO as a straight swap for red diesel. This is particularly significant considering the additional fuel duty being applied in 2021. They are also working with the University of Plymouth on unlocking the potential for hydrogen production.
- Fowey are keen to expand their export of aggregates by sea or rail to places like London Tilbury. Currently around 150,000-200,000 tonnes moves, with aspirations of growing this to 450,000 tonnes per year.
- Since there has been an annual decline in the tonnage of China Clay exported, the Harbour Commissioners are hopeful that the positive initiatives and investments being made in the port's infrastructure will attract alternative cargos to the Port.
- Road infrastructure improvements are key to unlocking the full potential of the Port and will allow a greater variety of cargo to be transported to/from the Port area.

² <https://www.cornwall.gov.uk/media/1oujxnuu/fowey-ndp-final-made.pdf>

Threats	
	<ul style="list-style-type: none">• Poor road links to the port. Fowey is a relatively isolated town, and the roads are narrow, meaning access for HGVs is difficult. This includes a 1km HGV only road tunnel which is prone to maintenance issues and subsequent closures.• There are concerns around the impact of HGVs on the urban realm and the negative repercussions of air pollution, vibration, and risk of collisions with listed structures in the tight confinements of smaller streets.• The export of aggregate from the Port is the obvious commodity to exploit but a firm contract to do so remains elusive.• The future sustainability of the port requires costs to be kept down for the China Clay industry, this in turn, can only be achieved by maintaining a sufficient volume of other cargoes through the Port.• There is a notable absence of dockside capacity and infrastructure to cater for any growth in cruise ship activity beyond providing for itinerary stops.