











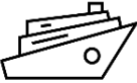




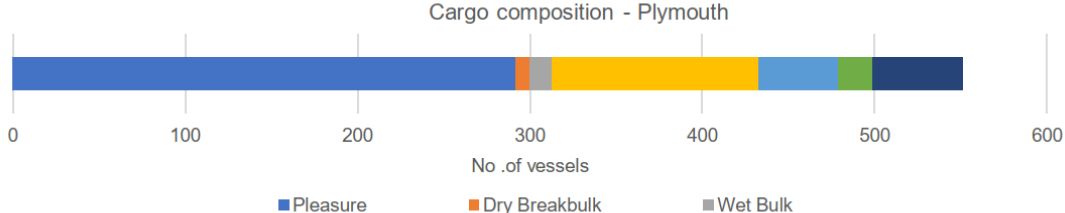


South West Freight Strategy

Port Dashboard – Plymouth

Peninsula Transport & Western Gateway Sub-
national Transport Bodies

WP12 International Gateway Study

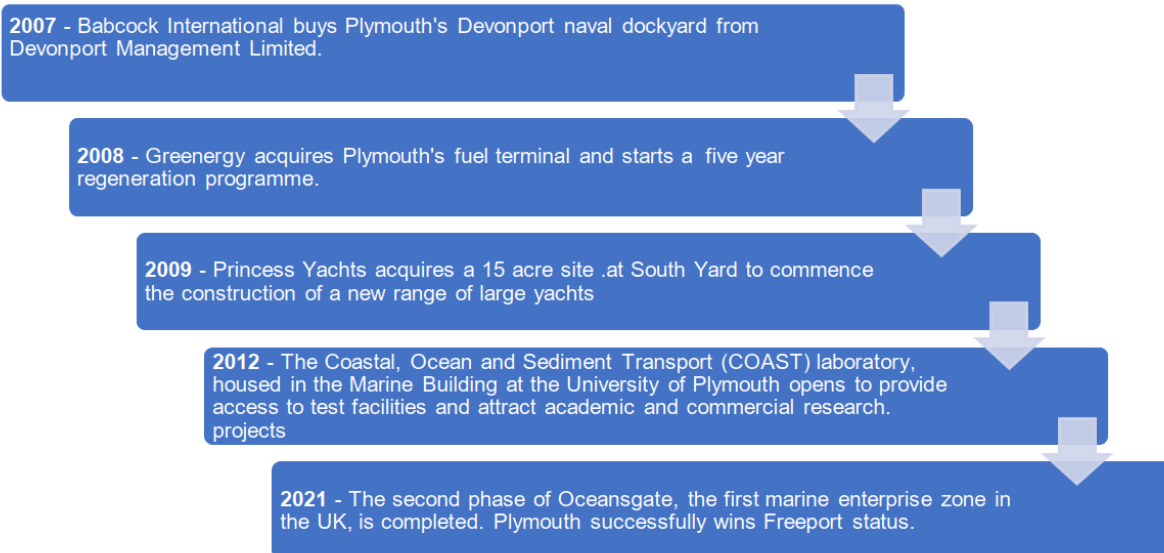
Gateway	Plymouth	Type	Port	County	Devon										
Operator(s)	Multiple	Size	750 acres	Employees	Approx. 15,000										
<p>The 'Dockyard Port of Plymouth' is located between the mouths of the rivers Plym to the east and Tamar to the west. Port operations consist of two main elements: the Royal Navy and Ministry of Defence (MoD) facilities in Devonport and commercial port activities primarily taking place in Millbay (ABP), Cattewater and Sutton Harbour. Devonport is the largest naval base in Western Europe, covering more than 650 acres. The Queen's Harbour Master has statutory control and manages the vessel traffic for the entire port.</p>															
Freight Markets	Tonnage (2018)	2.441m (DfT)													
 Petroleum (Import)	 Animal Feed (Import)	 Clay (Export)	 Aggregates (Import/Export)	 Fish (Export)	 Bulk Fertilisers (Import)	 Containers (Import)									
Description	<p>The commercial terminals at Cattedown, Victoria, Corporation and Turnchapel wharves handle a variety of cargo. Cattedown Wharves predominately handles bulk liquid products (i.e. petroleum tankers). A variety of dry cargo vessels call at Victoria Wharf to discharge and load salt, clay, fertiliser and wood chips. Corporation Wharf is the cement terminal for Plymouth. Sutton Harbour is where vessels land the fish they have caught. Millbay is predominantly a ferry hub but also handles an array of industrial cargoes (high value/small goods). Underpinning the successful Freeport bid is the aim to build on Plymouth's marine innovation strengths and historic reputation as the 'ocean' city.</p>														
Passenger Markets	People (2018)	432,000 (DfT)	Berths/Docks	1											
 Continental & Local Ferries (Timetable)	<p>Brittany Ferries operates two services out of ABP's terminal in Millbay:</p> <ul style="list-style-type: none"> • Pont-Aven Ferry (Plymouth-Santander), two round trips per week • Armorique Ferry (Plymouth-Roscoff), daily round trips <p>Local ferries run on seasonal timetables:</p> <ul style="list-style-type: none"> • Plymouth Boat Trips – Cremyll Ferry, every 30 minutes, 8-minute duration • Plymouth Boat Trips – Cawsand Ferry, summer only, every 90 minutes between 9AM and 5PM • Plymouth Boat Trips – Barbican, RWY and Mt Edgcumbe Ferry, every 90 minutes between 9.30AM and 5.00PM • Mount Batten Ferry (Barbican-Mount Batten), every 30 minutes, daytime only 														
 Cruise Services (Itinerary)	<p>The Port of Plymouth caters for passenger cruises with the landing facilities and ship berth in the Millbay terminal (vessels up to 220m) and are actively encouraging larger vessels to anchor at three anchorages in the Sound. The port is less than a mile from Plymouth centre and therefore gives easy access for a day visit to the city. After the pandemic, seven cruise ships visited Plymouth in 2021 and at least nine are calling in 2022. The Visitor Plan 2020 to 2030 sets out a key objective to increase capacity for cruise ships and will be achieved through the development of a second smaller berth facility at Trinity Pier. There are plans for investing in the port to cater for super ferries of the future; providing there is sufficient traffic and perceptions change through marketing.</p>														
Port & Industry Operations		This is what takes place on site or/and the immediate hinterlands													
 Dockyard Services (Babcock International)	 Yacht Builders (Princess Yachts Ltd)	 Fuel (Greenenergy)	 Cargo Handling (Victoria Group)	 Quays Storage (Victoria Group)	 Maritime Innovation (Oceansgate)										
Port cargo composition (5th July-25th June 2022)¹	<p>Cargo composition - Plymouth</p>  <table border="1"> <caption>Cargo Composition - Plymouth (Approximate Data)</caption> <thead> <tr> <th>Vessel Type</th> <th>Approximate Number of Vessels</th> </tr> </thead> <tbody> <tr> <td>Pleasure</td> <td>280</td> </tr> <tr> <td>Dry Breakbulk</td> <td>150</td> </tr> <tr> <td>Wet Bulk</td> <td>10</td> </tr> <tr> <td>Other</td> <td>60</td> </tr> </tbody> </table>					Vessel Type	Approximate Number of Vessels	Pleasure	280	Dry Breakbulk	150	Wet Bulk	10	Other	60
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¹ <https://www.marinetraffic.com/en/ais/details/ports/429?name=PLYMOUTH&country=United-Kingdom>
Prepared for: Peninsula Transport | Western Gateway Sub-national Transport Bodies

Description	Devonport is home to the largest naval base in Western Europe, yacht manufacturer Princess Yachts and a diverse range of local companies under the auspices of the Oceansgate Enterprise Zone. Oceansgate on South Yard together with Turnchapel Wharf on the Cattewater are hubs for marine industries, R&D, and innovation. Most of the West Country's fuel comes through Cattedown and Mayflower tank farm facilities for Greenergy. Victoria Wharf handles and stores most of the port's dry cargo. Sutton Harbour primarily caters for the local fish industry and has been development around waterside recreation and leisure activities.			
Connections	Road Link	A38 & A374	Rail Link	Devonport (Passenger)
Rail Services	GWR – Penzance to Plymouth Branch Line (hourly). Plymouth's central railway station is less than a mile (1.6km) from the port entrance and has regular services to Bristol, Birmingham and London.			
Bus Services	Services 14, 34, 25 and 48 pass through the various port areas.			

The Port of Plymouth (Millbay/Devonport, Cattewater) can be accessed by the A38 and A374 for private vehicles and HGV movements servicing the port environment and for passengers seeking to access the terminal facilities. This requires navigating through the city and mixing with local traffic travelling between the centre and the A38 (SRN).

Investment Timeline 2007 - 2021



Future developments

- Plymouth City Council are drawing together a package of 'transformational' infrastructure projects under the Levelling Up Fund to unlock the opportunity presented by the areas freeport status. This includes the Oceansgate innovation centre (at the South Yard), upgrading port access infrastructure (to meet export demand) and to create high value jobs through repurposing waterfront buildings and the development of a mobility hub.
- At proposed plans include improvements include more border control booths and better traffic management to allow swifter boarding and disembarking for goods and passenger traffic (making the former more appealing for hauliers). A new passenger boarding bridge and modernising the terminal building are also part of the bid.
- The redevelopment of Devonport Dockyard into a maintenance centre for new nuclear submarines (Devonport's 10 Dock) is the first part of a £2bn overhaul of facilities at the UK's largest dockyard. This supports the Astute programme and will help deliver local jobs.

SWOT Analysis

Strengths

- Well established and diverse port environment with established infrastructure and a natural clustering of associated businesses and industries; including naval, boat building, R&D, fish market, marine services.
- Relatively deep water & natural harbour to accommodate the largest vessels for freight and passenger movements, especially as vessels extend in size and weight across the industry.
- Devonport and naval heritage help to define Plymouth both domestically and internationally. This is also a major selling point for the city.
- Major centre for higher education and research and development in the marine sector (Oceansgate, Marine Business Technology Centre (MBTC)).

Weaknesses

- Access by road from the A38 is poor and causes delay in freight turnaround times, especially for the Devonport end as the city centre lies right in between the dockyard and the A38.
- HGV parking needs to be incorporated into new freeport designation and matched against growing HGV flows.
- Limited water depth at low tide and navigational constraints prevents larger vessels from using the port.
- Limited by its peripherality, it serves largely local and regional commercial markets.
- Limited mix of cargoes - no regular container services and heavily dependent on liquid bulk oil.
- Low level of exports and outward traffic.
- Rail – restricted mainline loading gauge - limited rail freight facilities, sidings truncated so don't serve all of the Port.
- Congestion on the surround highway network, including the A38, with significant planned development in the area adding to the pressures.

Opportunities

- Plymouth has become a Freeport unlocking million pounds of funding for the area. Three key sites in and around Plymouth will form part of the Freeport: South Yard will be developed as a tax site and will include a new innovation centre, a mobility hub, and new factory developments. Langage will be developed as a tax site with a customs zone and industrial units for high-value marine, defence and space engineering and manufacturing and a logistics hub with a tax and customs boundary with warehousing storage and engineering space at Sherford.
- There is a long-term opportunity for the port to service the renewable energy sector in its different guises; especially developing further innovations for floating offshore wind turbines.
- The Crown Estate is releasing 4GH of sea-bed estate by 2035 to accelerate offshore wind power (especially in light of the energy crisis).
- Work has begun on the £80million transformation of Plymouth's main railway station into a modern transport hub with shops and offices. Land at the Railway Station is allocated for a mixed-use regeneration scheme that delivers a high-quality gateway and arrival point to the city and increases the capacity of the station to accommodate increasing numbers of passengers.
- The cruise market is another growth opportunity and with ABP's plans to develop a second berth at Trinity Pier to expand Millbay's capacity the building blocks are being laid. This includes new 'super' ferries to Africa.
- The refurbishment of Devonport Dockyards represents an opportunity to help develop local supply chains and also explore coastal shipping for the movement of bulky materials to and from site.
- Enhanced signage and wayfinding alongside enhancements to the visual amenity around Millbay are aligned with improvements to city centre upgrades due to take place to improve the first & last mile for passengers.

Threats

- Competition for cruise and renewable energy sector (Falmouth).
- No current 'live' plans to re-instate Cattewater rail access which may limit the potential for modal shift from road to rail. This could be addressed by conducting a feasibility study.
- European Marine Site designation requires any development to ensure no significant environmental impact.
- Funding gaps can delay or halt the infrastructure development.
- There are concerns that inflation, energy costs and interest rate increases will have implications on Plymouth Fisheries (England's second largest fish market) which operates out of Sutton Harbour.
- With aspired growth comes the need for Millbay to provide laydown space for unaccompanied trailers. This may be satisfied through land within the freeport designation inland.