



6. Significant Marine Sector Sites

6. SIGNIFICANT MARINE SECTOR SITES

- 6.1 It is desirable to identify the strategic locations and sites used by marine industries or sites of strategic potential so that their significance can be recognised in the process of strategic planning and as a basis for monitoring the needs of marine industries. A list was drawn up of sites which are especially suited to the needs of marine activities, whose loss would, in our view have implications at, at least, sub regional level.
- 6.2 A preliminary list of sites was drawn up by systematically working along the coastline of the study area and identifying all sites that are in use, or have the potential to be used for marine industry purposes. The list was kept under constant review as the study progressed. Adjustments were made as more information and consultation was undertaken, on advice from the steering group and also following comments made by and discussions with members of the marine industry who attended the briefing session on 27 April. This process resulted in the identification of 25 sites considered to be of either existing or potential strategic economic significance (Table 6.1). It is important to emphasise that these are only the most important sites and the implication emphatically should not be drawn that those not listed are dispensable. It is also expected that marine activity over time will change and evolve, and the list of sites considered of strategic importance today may be different in the future.

Table 6.1: Marine sector sites of strategic economic significance

Site No.	Site Name
1.	Lymington River up to the B3054 road bridge
2.	Calshot Spit
3.	Fawley Marine Terminal, Refinery and Petrochemical Complex
4.	RAF Hythe
5.	Dibden Reclaim
6.	Marchwood Seamounting Centre to Marchwood Wharf
7.	Port of Southampton – port operational land from Redbridge to the boundary with Ocean Village on the Itchen (excluding Royal Pier/Town Quay/Mayflower Park but including the Oceanography Centre).
8.	Royal Pier/Town Quay/Mayflower Park
9.	Ocean Village
10.	Itchen Wharves (east and west bank)
11.	Hamble Oil Terminal and Jetty
12.	River Hamble
13.	HMS Daedalus
14.	Gosport – Haslar to Priddy's Hard
15.	Gosport – RNAD Frater/Bedenham
16.	Fleetlands
17.	Port Solent
18.	Horsea
19.	Whale Island
20.	Portsmouth Commercial Port
21.	HM Naval Base and Dockyard
22.	Chichester Marina
23.	Ryde Pier
24.	Cowes – River Medina, both banks as far as Newport
25.	Yarmouth

- 6.3 For each site, detailed boundaries were defined on an Ordnance base and a compatible system used for collecting, storing and displaying data.
- 6.4 The detailed boundary of each site was drawn up using the knowledge available within the consultant team, information obtained from site visits and from a desk based study (such as the relevant development plan proposals map). As the majority of the strategic sites are located adjacent to the water an administrative decision was taken to draw the seaward boundary of the site at mean high water mark, the boundary of harbour authorities' jurisdiction. However, it should be clearly understood that in most cases the strategic significance of the sites does not end at this point and relies on the marine connection. Similarly it should be understood that the boundaries drawn for the sites represent the views of the consultant team on the information available to them. The consultant team well understand that drawing a boundary immediately generates different implications for the area within the boundary and the area outside the boundary. The boundaries have been drawn by the consultant team on the basis of the information available to them. There may well be parcels of land outside of the boundaries drawn related to these sites which are of importance to marine industries. These areas should not be ignored in any future analysis simply because they do not fall within the boundary drawn by the consultant team. Plans showing the boundaries of each of the strategic sites along with the key environmental designations are reproduced at Appendix 8.
- 6.5 A database was designed to enable information collected for each site to be stored and displayed. Data for each site was obtained in accordance with a specification set out in a proforma. An initial draft proforma was designed and then subjected to discussion and analysis through the steering group meetings before it was finalised. A blank proforma is reproduced at Appendix 7. The information recorded on the proforma for each site covers:

1. *Background information on the site.*
Information such as its name, address, location, size, local authority area in which it is located and a brief description of the site.
2. *Key marine activities taking place within the site.*
Marine activities on the site are placed into general categories which are provided in detail at Appendix 7. The marine activity categories are based upon the marine sector definition produced by Marine South East as amended, which is discussed above in section 4.

It should be noted that the information provided in the proforma does not attempt to record each and every individual marine use occurring on the identified site, but rather sets out what are considered to be the key marine activities only. These key activities were determined through first hand knowledge of the sites, examination of existing information produced on the sites and site visits.

3. *Accessibility of the site in terms of road, rail and water.*
For road access each site was categorised in respect of its existing or possible accessibility to the different categories of road as defined or equivalent to those defined in the Hampshire County Structure Plan

Review. The different categories of road are identified as the National Primary Route Network, the Strategic Road Network and other road networks.

For rail access it was simply noted whether the site had existing rail access, possible rail access or no existing or possible rail access. For marine access the maximum depth of water to any part of the site as indicated on the Admiralty Chart was noted.

4. *The existing or potential economic significance of the site.*
Although all these sites are considered to be of existing or potential economic importance, the proforma includes an indication of their relative strategic significance using the following simple three point scale:

- i. of national significance, i.e. a significance beyond the regional level;
- ii. of regional significance, i.e. a significance beyond the local level; and
- iii. of local significance.

The sites were also categorised as either of existing or potential significance.

The categorisation was based on the judgement of the consultant team taking into account the information obtained for the relevant site and the information the consultant team obtained during their examination of the existing marine activity baseline position outlined above in Section 4.

5. *The relevant adopted development plan for the site and the relevant key development plan designations and policies.*
As for other entries the proforma does not attempt to provide a complete analysis of every development plan policy relevant to each site and their implications. For some sites this would require an extensive essay following a detailed land use planning policy context analysis, something which could not be done during the time of this study. Rather the information provided in the proforma aims to summarise the key designations or policies applicable to the site.
6. *The key environmental designations covering part or all of the site.*
Once again the information in the proforma aims to provide an indication of the key environmental designations. The information on environmental designations was obtained from the relevant adopted development plan, the relevant local authority or from information produced by Natural England or the Environment Agency.
7. *The key environmental designations covering the area between the mean low and mean high water mark.*
This information was included to address the issue discussed above of the site boundaries not extending to the mean low water mark, but at the same time gives an indication of the environmental constraints likely to affect strategic sites. These designations were also obtained from the

relevant adopted development plan, the relevant local authority or information produced by Natural England or the Environment Agency.

8. *An indication of the constraints, strengths, threats and opportunities to future operations and prospects at the site.*
- 6.6 The information collected for each site is thus partly factual and partly judgement, drawing on the knowledge within the consultant team and supplemented by views of others with specific expert knowledge of the site in question. Completed proformas for each of the sites are provided at Appendix 7.

Summary of findings on strategic sites

- 6.7 Within this section of the report a summary of the information contained in the relevant site proforma is provided.

Location and size of strategic sites

- 6.8 Figure 6.1 provides an overview of the location of the strategic sites in the study area. Whilst they are generally well spread throughout the study area there are two main clusters. The first cluster consists of sites 2 to 12 which are all located alongside the Southampton Water / River Test / River Itchen / River Hamble are part of the study area. The second cluster consists of sites 14 to 21 and are found in Portsmouth Harbour. Both the Port of Southampton and Portsmouth Naval Base are served by deep-water channels which are effectively elements of national economic and defence infrastructure respectively.
- 6.9 The size of the defined strategic sites varies depending, in general terms, on the type of activity taking place within them. As a rough rule of thumb the significant sites in existing commercial port use are larger than those in leisure or manufacturing use. This reflects the scale of modern cargo operations and the fact that ports are much more than locations where cargo is loaded or unloaded from vessels. There are significant elements of storage, distribution, logistics, administration and cargo preparation activities within sites identified for commercial port operations which all have a demand for land adjacent or close to where the cargo is loaded or unloaded.

Key marine activities

- 6.10 Analysis of the activities occurring on the sites indicates that several accommodate a wide spectrum of marine activities. In the majority of instances it is clear what is the key marine activity taking place on the site. However, this is not universally so. For example site 2, Calshot Spit, is identified partly because it also houses the radar facilities used by the Southampton Vessel Traffic Services to control navigation.
- 6.11 Most of the sites are intensively used and several have very little if any spare space available. This obviously raises an important issue that is discussed further later.

6.12 Time and resources constraints meant that it was not possible to analyse in great detail the marine uses taking place within the strategic sites. Four case studies were selected for more detailed consideration. These are described in Section 5 above and consist of: Wallenius Wilhemsen Logistics, who are located within strategic site 7; Hamble Yacht Services, who are located within strategic site 12; and Formula Yacht Spars, who are located within strategic site 1. Figure 6.5 indicates some of the major marine businesses that operate from some of the strategic sites.

Accessibility

6.13 Accessibility for the different strategic sites also varies. In respect of road access the sites considered, at a general level, to have the most advantageous existing or potential connections are sites 3 to 8 and sites 17 to 21. Clearly the site with the most advantageous rail connection is the Port of Southampton which benefits, through various rail freight terminals, from direct connections into the main line through Southampton. Similarly the Port of Southampton benefits from the most advantageous marine access, served as it is by the 12.6 metre deep channel and providing alongside berth depths of up to 15 metres. The form in which marine access is provided is also important. It is generally considered that a quay or slipway with direct access to a reasonable depth of water supported by area of land ashore is generally of more benefit than access via a series of jetties or piers.

6.14 That having been said, it is impossible to generalise because various marine activities have different needs. Merely because a site does not have access to deep water, the rail network or the national primary road network does not, of course, mean that its accessibility is poor in relation to the type of marine use it supports. Nonetheless, we think that adequate access is such a critical concern for many marine industries (and lack of it can make a good site unusable) that the effort required to identify each site's needs would be repaid by ensuring that where they are already met they can be protected from incursion by other development and where that is not the case, the need for improvements can be properly assessed and fed into the transport planning process.

Key development plan designations and policies and environmental designations

6.15 An overview of the approach taken in policy documents to marina activities along the Solent Waterfront is provided in Section 3. The information in the proformas seeks to identify the key site-specific policies and requirements for the strategic sites.

6.16 The strategic sites are located within the boundaries of several local authorities, and are therefore subject to different policies and policy approaches. Across the study area there are slight variations in the way the relevant development plans deal with common issues. Where policies recognise and support the retention of marine activities on a strategic site, this is generally limited to the current activities and site boundaries.

- 6.17 The coastal zone is heavily designated for its perceived environmental and cultural significance. Policies in favour of these considerations are dominant in development plans and frequently re-appear as conditions or caveats to otherwise supportive policies. National and international designations are backed by Government policy statements and legislation and are therefore critical to an analysis of the true potential, or lack of it, for development of strategic sites. This is a key consideration in formulating any conclusions about the viability of sites for marine industries. An inability to comply with requirements for mitigation or compensation without policy support identifying the overriding need for marine industry would be fatal to the prospects of development proposals on such sites.
- 6.18 The foreshore areas surrounding the strategic sites are generally heavily protected for their nature conservation importance. Any conflict between marine activities and their environment is often not as a result of what takes place on the land, but the connection between the land and the water. Figures 6.2, 6.3 and 6.4 show the locations of various environmental designated areas in relation to the strategic sites.

Existing or potential national economic significance

- 6.19 The sites which are considered to be (or potentially could be) of national economic significance are listed below, in geographical order from west to east.

Site 1 Lymington River – Recognised worldwide as a marine leisure location; the areas identified on the Lymington River also contain other marine related activities that are of some significance, i.e. manufacturing and boat building.

Site 3 Fawley Marine Terminal, Refinery and Petrochemical complex – The largest refinery in the UK and one of the largest in Europe this facility relies on deep water access in Southampton Water and is clearly of national significance.

Sites 5 and 7 The Port of Southampton and the Dibden Reclaim – The importance of the Port of Southampton has already been outlined. This facility is an international deep sea gateway into the UK and clearly of national significance. Dibden Reclaim remains identified in the development plan, subject to the satisfaction of criteria relating to infrastructure and the environment, as the strategic expansion land for the Port and is a site of potential national significance.

Site 6 Marchwood Seamounting Centre to Marchwood Wharf – This site is already of national significance due to the presence of Marchwood Seamounting Centre. However, its proximity to the deep water channel and to the existing Dock and its landward transport connections means that it also potentially a development opportunity for marine uses of national significance.

Site 11 Hamble Oil Terminal and Jetty – This fuel storage and distribution depot is considered to be of national significance.

Site 12 River Hamble – This is a yachting and boating haven of international renown. In addition to its 3000 plus moorings it contains a significant boatbuilding and repair activities as well as being a recognised base for national and international yachtsman. For the marine leisure industry, this site is clearly of national economic significance.

Sites 15, 16, 18, 19 and 21 Various MoD and Naval sites in Portsmouth Harbour – Collectively these sites are clearly of national economic significance, serving the MoD uses in Portsmouth. Recent studies have identified that overall the presence of the navy, the MoD and primary civilian contractors in the region as a whole (of which the Portsmouth Base is the core) is responsible for a total of 38,000 jobs and more than 5% of regional Gross Domestic Product (GDP).

Site 24 River Medina / Cowes – The River Medina is one of the busiest in the country for recreational sailing and boating. It has an international reputation for these activities, most clearly demonstrated during the International Cowes Week sailing regatta held during August every year. In addition to marine leisure and recreation and related activities the site is also significant in that it is the main transport interchange with the main land in terms of both passengers and freight.

Existing or potential regional significance

6.20 The following sites are considered to be of existing or potential regional economic significance.

Site 4 RAF Hythe – This former military port facility has existing landside and marine infrastructure and is being put to marine industrial use by SEEDA. It has limitations and is not suitable for those uses requiring large areas or a high standard of access. Access to deep water is via jetties and pontoons and therefore of limited use to certain marine activities (i.e. those that require launching facilities through slipways or an alongside quay). However the site has the potential to accommodate a significant amount of marine activity.

Site 8 Royal Pier / Town Quay / Mayflower Park - This site should be considered of regional significance because it hosts the boat show, an activity and event with significance arguably beyond the regional level, and key ferry services to the Isle of Wight.

Site 10 River Itchen – This is a collection of a number of individual sites used by the marine leisure and ports (mainly sea-won aggregates) industries, which together is of regional significance.

Site 13 HMS Daedalus – We have included this large site, partly owned by SEEDA, for its regional potential. It is the only sizeable near-coastal site on which marine industries could be accommodated with room to expand. For it to fulfil its potential, access to the shore and to the Solent would need to be improved.

Site 14 Haslar to Priddy's Hard – This site contains a mix of land uses and activities and has a long history of marine activity, defence and employment

uses. The prominent marine use is that found within the Gosport and Haslar Marinas. The significance of this site is considered to be greater than the local level. We have included this site as much for its potential intensification for marine uses

Site 17 Port Solent, and Site 22, Chichester Marina – These are the two largest marinas in Portsmouth and Chichester Harbours respectively. They have been included as of regional significance to underline the significance of the marine leisure industry in these harbours.

Site 20 Portsmouth Commercial Port – A key passenger gateway for Western Channel routes and a significant commercial port, although small in comparison with Southampton.

Existing or potential local significance

- 6.21 The remaining strategic sites are considered to be of existing or potential local economic significance.

Site 2 Calshot – Contains important marine leisure activities in the form of watersports, training facilities, boat storage as well as safety and navigation equipment.

Site 9 Ocean Village – This site has in the past been the base for events of national or international renown, be arguably of regional importance and may be used again. However, the main function of this site appears to be shifting towards an area of publicly accessible waterfront for the local community.

Site 23 Ryde and Site 25 Yarmouth – Both are key ferry ports but neither have a large supporting base of marine industries.

Strengths, Constraints, Threats and Opportunities

- 6.22 Whilst each site has its own strengths, constraints, threats and opportunities a number of general trends emerge from the analysis of the sites. Similar points arose through the business survey and face -to-face interviews.

- 6.23 The key strength to emerge is that there is significant evidence that most respondents continue to regard the Solent as one of if not the premier location for marine industries in the UK. There is also general agreement that these sites accommodate sector-leading activities and facilities across the full range of the marine industries, albeit that a number were operating in less than ideal conditions, in dated premises and inadequate sites, when their competitors elsewhere in the UK or abroad had taken a more radical approach to modernisation and were able to operate more efficiently and with fewer restrictions on expansion. Most respondents cite the difficulties in gaining planning consent and the high price of land as the principal difficulties followed by the increasing problems of manufacturing close to residential areas.

- 6.24 The analysis confirms that there are a number of significant constraints to the ongoing and future use of several significant marine industry sites. One of the main identified constraints results from the necessary geographical location of

these sites in the coastal zone, an area highly protected for its nature conservation and ecological importance. The potential conflict between present, and more significantly, future operations and activities at these sites within areas of nature conservation importance is a key constraint

- 6.25 Juxtaposition to incompatible land uses is also a constraint on several sites. From the business surveys and face to face interviews there is anecdotal evidence that this problem is not recognised in local development plans or documents and policies, is increasing and is likely to grow as pressure for residential development increases and environmental expectations and enforceable standards rise. In several cases respondents foresaw a scenario in which they could no longer operate, at least as they were currently doing.
- 6.26 The fact that few sites have little room for businesses to grow and several are already operating at or near their physical capacity is a key observation. In some instances this has led to innovative ways to expand, but these are palliative measures that cannot disguise the fact that a number of marine industries are not performing to their potential because the opportunities to expand either do not exist or are unaffordable. The case study examples of businesses outlined above in section 4 provide examples. Wallenius Wilhelmsen, who even though in collaboration with the port owners ABP have developed the first multi storey vehicles storage facilities in the UK, would still like additional land within the Port of Southampton or close by to expand and develop their existing operations. Formula Yacht Spars have had to carry out their operations on a split site in Lymington due to the inability to find one site of sufficient size, now hopefully resolved by a proposed move to the SEEDA site at Hythe.
- 6.27 Thus the value of the overall strength of the Solent as a base for marine industries (location, reputation and physical characteristics) is severely curtailed (for the Ports and marine leisure sectors particularly) by limited scope for expansion. The principal threat must therefore be that if it is not possible to expand in the Solent, key industries will either leave or adapt their presence here to the constraints. For the ports sector that could mean wholesale departures from Southampton if the Port cannot provide the land and infrastructure and if capacity becomes available elsewhere. For the marine leisure sector, the scenario is that manufacturing becomes increasingly unviable in the Solent, which becomes, effectively, merely a 'shop-window' for manufacturing elsewhere in the world.
- 6.28 There are a number of other general threats to key sites, including the advent of a new system of marine planning, the stated purpose of which does not appear to include assistance to marine industries. We take up a number of these points in our conclusions.
- 6.29 With few exceptions, it is impossible to avoid the conclusion that the main areas of 'opportunity' on most of these sites are in fact responses to constraints on expansion. It is difficult not to admire the ingenuity with which enterprises are adapting and reusing marine infrastructure that was, in some cases new more than a century or more ago, some of it now listed for its historical importance. However, the inescapable fact is that it is rarely possible for marine industries to operate as efficiently in such circumstances

as on a recent site, which most of their competitors already possess. It is easily possible to foresee the conditions for a spiral of decline that has previously affected UK industries in similar circumstances.