HAMPSHIRE COUNTY COUNCIL, NEW FOREST NATIONAL PARK AUTHORITY, PORTSMOUTH CITY COUNCIL, SOUTH DOWNS NATIONAL PARK AUTHORITY & SOUTHAMPTON CITY COUNCIL

Hampshire Minerals & Waste Plan: Partial Update

Wharves and Rail Depots Topic Paper

August 2022

Hampshire County Council

NEW FOREST NATIONAL PARK

Portsmouth CITY COUNCIL

South Downs National Park Authority

SOUTHAMPTON CITY COUNCIL

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Executive Summary

Introduction

This Topic Paper has been prepared to support the partial update of the Hampshire Minerals and Waste Plan.

Hampshire County Council, Portsmouth City Council, Southampton City Council, the New Forest National Park Authority and the South Downs National Park Authority (collectively referred to as the 'Hampshire Authorities') are working together to prepare a partial update to the Hampshire Minerals & Waste Plan (adopted 2013).

This paper reviews the existing and future capacity requirements for minerals and waste wharves and rail depots for the importation and exportation of minerals and waste, including their transportation by non-road means within Hampshire for the Plan period to 2040.

Wharves

There are five active wharves in Hampshire located along the coast in Southampton and Portsmouth. A number of wharves have become inactive or closed, the details of which are reviewed as part of the assessment to understand the constraints for such operations.

Rail Depots

The main rail depots in Hampshire are located at Eastleigh, Botley and Fareham where crushed rock (limestone) from the Mendips is imported. In addition, there are facilities at Bevois Park, Southampton and Fratton, Portsmouth.

Conclusion

The number of operational wharves in Hampshire has decreased but the impact on capacity is apparent. Rail capacity has been maintained. It is of vital importance that capacity at all wharves and rail depots is maintained through safeguarding policies. Potential locations for future wharf and rail depot capacity should also be safeguarded to ensure consideration is given to capacity in any decision-making on development.

Any changes in capacity will need to be monitored on an ongoing basis. Future opportunities should be encouraged in line with the policies of the plan.

1. Introduction

1.1 Hampshire County Council, Portsmouth City Council, Southampton City Council, the New Forest National Park Authority and the South Downs National Park Authority (collectively referred to as the 'Hampshire Authorities') are working together to prepare a partial update to the Hampshire Minerals & Waste Plan (adopted 2013).

1.2 To support the partial update, a number of Topic Papers have been prepared to provide more detailed information on key issues affecting the delivery of the Plan.

1.3 This Topic Paper reviews the existing and future capacity requirements for minerals and waste wharves and rail depots for the importation and exportation of minerals and waste, including their transportation by non-road means within Hampshire for the Plan period to 2040.

1.4 Matters included in the Paper include:

- Capacity of existing wharves and rail depots – including associated activities and facilities;
- Likely future demand for wharves and rail depots;
- Possible constraints to continued use or expansion at these sites;
- Potential need to retain existing unused preferred sites; and
- Identification of potential new and/or replacement sites.

1.5 This Paper builds on the findings of the 'Need Assessment for Wharves and Rail Depots'[1] that was prepared in support of the Hampshire Minerals and Waste Plan[2] which was adopted in 2013.

Study Approach

1.6 The previous Wharves and Rail Depot Study included both questionnaire forms to gather data in conjunction with site meetings to review and discuss each site and this method has been repeated to provide data for this Paper. As the information was gathered during times in which Covid restrictions were in place, government guidance prevented site visits from being undertaken. As such, virtual meetings were arranged with most wharves and rail depot operators to obtain the information needed and assist in the understanding of activities and facilities used on each site.

[1] Need Assessment for Wharves and Rail Depots - September 2009
[2] Hampshire Minerals and Waste Plan (2013) - https://documents.hants.gov.uk/mineralsandwaste/HampshireMineralsWastePlanADOPTED.pdf

1.7 Meetings with the operators were considered necessary in the event that some questionnaires were not returned or fully completed as requested. Hampshire County Council are therefore grateful to the following operators, landowners and agents which were able to contribute (if only in part) to the completion of the questionnaires during the preparation of this Paper:

- *Cemex Operations UK Ltd;*
- *Tarmac Aggregates;*
- *Network Rail;*
- *Solent Gateway Ltd.*

1.8 The information gained from returned questionnaires or notes from discussions, was reviewed in conjunction with the previous study. Some of the tables and information produced herein have also been based on reasonable estimates where questionnaires were not returned.

1.9 For confidentiality reasons some operator's information is not reproduced here and is not available separately. However, the following sections of this Paper should provide a reasonable understanding and background knowledge on the overall size and nature of Hampshire wharf and rail depot facilities handling minerals and waste. Similarly key comments are generalised for anonymity.

1.10 The remainder of this Topic Paper is set out as follows:

- Section 2: Policy context
- Section 3: Mineral Movements
- Section 4: Wharves in Hampshire
- Section 5: Rail Depots
- Section 6: Safeguarding

2. Policy Context

National Policy

2.1 The National Planning Policy Framework (NPPF)[3] outlines the need for local authorities to set out policy requirements relating to the movement of minerals states that:

> *"Planning policies should:*
>
> *e) safeguard existing, planned and potential sites for: the bulk transport, handling and processing of minerals; the manufacture of concrete and concrete products; and the handling, processing and distribution of substitute, recycled and secondary aggregate material;"*
>
> *f) set out criteria or requirements to ensure that permitted and proposed operations do not have unacceptable adverse impacts on the natural and historic environment or human health, taking into account the cumulative effects of multiple impacts from individual sites and/or a number of sites in a locality"*

2.2 In relation to the sustainable transport of materials, the NPPF states that planning policies should:

> *"be prepared with the active involvement of local highways authorities, other transport infrastructure providers and operators and neighbouring councils, so that strategies and investments for supporting sustainable transport and development patterns are aligned"* and *"identify and protect, where there is robust evidence, sites and routes which could be critical in developing infrastructure to widen transport choice and realise opportunities for large scale development"* (para. 106)

2.3 The National Planning Policy for Waste[4] provides a guide on decision-making on assessing sites and areas for new or enhanced waste management facilities and states:

> *"the capacity of existing and potential transport infrastructure to support the sustainable movement of waste, and products arising from resource recovery, seeking when practicable and beneficial to use modes other than road transport"* (para. 5)

[3] National Planning Policy Framework (2021) Para 210 - https://www.gov.uk/government/publications/national-planning-policy-framework--2
[4] National Planning Policy for Waste (2014) - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/364759/141015_National_Planning_Policy_for_Waste.pdf

2.4 The National Policy Statement for Ports[5] provides the framework for decisions on proposals for new port development. It is also a relevant consideration for the Marine Management Organisation, which decides other port development proposals and for local planning authorities where they have a role to play.

2.5 More broadly, the NPPF also aims to provide for new homes, economic development and regeneration, with a focus on sustainable locations such as cities and urban areas.

Local Policy

2.6 Hampshire County Council (HCC), Portsmouth City Council (PCC), Southampton City Council (SCC), the New Forest National Park Authority (NFNPA) and the South Downs National Park Authority (SDNPA) adopted the Hampshire Minerals & Waste Plan (HMWP) in October 2013 which was produced in partnership. The HMWP provides minerals (and waste) planning policy in Hampshire until 2030.

2.7 The NPPF dictates that local plans should be reviewed to assess whether they require updating at least once every five years. An initial review of the HMWP was undertaken in 2018 and concluded that the Plan's policies were deemed to be effective in enabling development and implementation of the Vision. A commitment was made to hold a Review Workshop (which was hosted by Hampshire County Council on 25 September 2019) and to undertake a further Review in 2020.

2.8 The 2020 Review of the HMWP was prepared and concluded that, although the HMWP has been performing and working to support minerals and waste planning, a partial update is needed to ensure full compliance with the NPPF and the NPPW.

2.9 There are currently three policies within the adopted HWMP that relate to wharves and rail depots (see Appendix 1):

- Policy 16: Safeguarding – minerals infrastructure
- Policy 19: Aggregate wharves and rail depots
- Policy 34: Safeguarding potential minerals and waste wharf and rail depot infrastructure

[5] National Policy Statement for Ports (2012) - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/3931/national-policy-statement-ports.pdf

2.9 The adopted Southampton City Council Core Strategy[6] outlines the importance of The Port of Southampton and sets out policies to support the future growth of the port. Southampton's wharves lie within the Itchen Riverside Quarter, identified in the city's emerging Local Plan as a key area for regeneration.

2.10 It is recognised that the Port of Southampton is a major international deep sea port with significant global and economic importance, making a vital contribution to the nation, regional and local economy. The needs of the marine industry are a key consideration in the safeguarding of waterfront sites in the Strategy.

2.11 The Core Strategy sets out policies to promote and facilitate the growth of the International Gateway Port of Southampton. Within the city operational port growth will take place within the existing port boundaries as defined on the Proposals Map. Within the city, growth will be facilitated by: Refusing planning permission for non-port related development within the port and supporting an increase in transhipments (ship to ship), rail freight to / from the port and appropriate road improvements leading to the port.

2.12 These objectives are contained within Policy 34 of the adopted HMWP in relation to land in Southampton.

2.13 The Portsmouth Plan[7] contains policy PCS11 that seeks to protect land at the port and HM Naval Base (that become surplus to the needs of the Ministry of Defence), and support alternative uses that provide marine related employment. The Plan is supportive of development that strengthens the marine sector and supports the commercial port.

Other relevant documents

2.14 The South Inshore and Offshore Marine Plan (2018)[8] has been prepared for the purposes of Section 51 of the Marine and Coastal Access Act 2009 and has been adopted with the agreement of the Secretary of State for Environment, Food and Rural Affairs. The Plan introduces a strategic approach to planning within the inshore and offshore waters between Folkestone in Kent and the River Dart in Devon, providing a clear, evidence-based approach to inform decision-making by marine users and regulators on where activities might take place within the marine plan area. The Plan contains a number of policies

[6] Southampton City Council Core Strategy – Amended Adopted Version (March 2015) https://www.southampton.gov.uk/media/io4midh4/amended-core-strategy-inc-cspr-final-13-03-2015_tcm63-371354.pdf
[7] The Portsmouth Plan (Portsmouth's Core Strategy) Adopted January 2012 https://www.portsmouth.gov.uk/wp-content/uploads/2020/05/The-Portsmouth-Plan.pdf
[8] South Marine Plan - https://www.gov.uk/government/publications/the-south-marine-plans-documents

which are relevant to Policies 16 and 34 of the adopted HMWP as they refer to the safeguarding of wharves and marine infrastructure.

2.15 The relevant policies from the South Inshore and Offshore Marine Plan (2018) are as follows:

Policy S-PS-1 Ports and shipping
Proposals that may have a significant adverse impact upon current activity and future opportunity for expansion of port and harbour activities should demonstrate that they will, in order of preference:

a) avoid
b) minimise
c) mitigate significant adverse impacts
d) if it is not possible to mitigate significant adverse impacts, proposals should state the case for proceeding.

Policy S-AGG-1 Aggregates
Proposals in areas where a licence for extraction of aggregates has been granted or formally applied for should not be authorised, unless it is demonstrated that the other development or activity is compatible with aggregate extraction.

Policy S-AGG-2 Aggregates
Proposals within an area subject to an Exploration and Option Agreement with The Crown Estate should not be supported unless it is demonstrated that the other development or activity is compatible with aggregate extraction.

Policy S-AGG-3 Aggregates
Proposals in areas where high potential aggregate resource occurs should demonstrate that they will, in order of preference:

a) avoid
b) minimise
c) mitigate significant adverse impacts on aggregate extraction
d) if it is not possible to mitigate significant adverse impacts, proposals should state the case for proceeding.

Policies S-AGG-1, S-AGG-2 and S-AGG-3 apply to the inshore and offshore

Policy S-INF-1 Infrastructure
Appropriate land-based infrastructure which facilitates marine activity (and vice versa) should be supported.

2.16 In addition, the Mineral Products Association and Planning Officer Society's Minerals Safeguarding Guidance places importance on the role wharves play in the movement of minerals requiring '*the right facilities – rail depots, sidings, and wharves – of the right size, in the right place. Transport by water and rail makes movement of these low value bulk materials economically viable and reduces carbon dioxide and other emissions, as well as congestion. Such facilities are also important for import and export of industrial minerals. Many areas are*

increasingly reliant on imports of these raw materials as their own economic mineral resources are heavily constrained or becoming depleted'[9].

2.17 The consultation draft of the Port of Southampton Masterplan[10] sets out a 20-year plan (2016-2035) for the Port area, as required by regional policy and Department for Transport guidance. Whilst the Master Plan is not a policy document, it sets out the growth strategy for the Port.

2.18 The Port anticipates a demand for major growth over the lifetime of the Master Plan which in the short / medium term can be accommodated within the boundaries of the existing port. There is considered to be very little scope to meet the ongoing and developing needs of the market within the confines of the existing port. Therefore, the Master Plan includes a strategic land reserve for future port expansion located to the north west of Hythe.

2.19 The Masterplan highlights that the existing approximate 24 acre (9.7 hectare) dry bulks terminal at the Port is located alongside deep water in the Western Docks. Dry bulk cargoes handled by the Port include a wide range of commodities including grain, fertiliser, animal feed, biomass, minerals, renewables and recyclables. Grain – handled in the Eastern Docks - is the largest element, accounting for approximately 40% of the dry bulks trade.

2.20 The Master Plan outlines national forecasts for 'other dry bulks' show a fairly flat market for UK ports, with the market climbing from 40 million tonnes in 2005 to 42 million tonnes by 2030, demonstrating a growth rate of just 0.2% per annum. This overall trend is underlined by decline in some markets and growth in others. In the order of 1.38 million tonnes of dry bulk cargoes were handled through the Port in 2015. Looked at historically, the amount of dry bulk cargo handled has been fairly static. This trend is generally a result of the fact that over recent years dry bulk cargoes have been constrained by an inability to compete with other trades for the finite area of storage land available at the Port.

2.21 One area of growth identified in the Master Plan, however, is the export of scrap metal by S J Norton and Co Ltd, one of the Country's leading scrap exporters, making a long-term commitment to the Port. In addition, in recent years, more than 250,000 tonnes of road salt have been imported through the Port to supplement the supply from UK salt mines. There has also been

[9] Minerals Safeguarding Guidance (Para. 1.6) (MPA & POS, 2019) - https://www.mineralproducts.org/MPA/media/root/Publications/2019/MPA_POS_Minerals_Safeguarding_Guidance_Document.pdf

[10] Port of Southampton Master Plan (Consultation Draft) - https://www.southamptonvts.co.uk/admin/content/files/New%20capital%20projects/Master%20Plan%202016/Master%20Plan%202016%20-%202035%20Consultation%20Document%20Oct%202016.pdf

significant recent investment in equipment and facilities for handling dry bulk cargoes, which has mainly been brought about by the continuing increases in scrap metal exports.

2.22 Against this background and having regard to the aspirations of the dry bulk operators at the Port and accepting and understanding that there will be variability in trade from year to year, the forecasts set out in the Master Plan predict average demand growth of 6% to 2020 and a conservative estimate of 2.5% beyond 2020. It is, therefore, anticipated that the Port could handle approximately 1.9 million tonnes by 2020, 2.1 million tonnes by 2025 and 2.7 million tonnes by 2035 with appropriate land availability and investment.

2.23 The Master Plan recognises that the Crown Estate are undertaking analysis of a marine aggregate 'hub wharf' concept for the southeast of England. This concept is being investigated for a number of reasons, including: i) to give licence holders more efficient options for bringing marine aggregate onshore; ii) to reflect the shift in the focus of aggregate businesses from national aggregates production to one of global cement production; iii) to provide for the needs of the future dredging fleet – which is getting larger – with the obvious implications for existing constrained facilities; and iv) to provide efficient and sustainable rail / barge / short sea supply and distribution routes.

2.24 Southampton has long been recognised, due mainly to its marine access advantages and its landside transport connections, as a potential location for a deep-sea aggregate hub facility. Throughout the lifetime of the Master Plan options will continue to be investigated, along with key stakeholders such as the Crown Estate and the aggregate industry, to explore the possibility of providing a deep-water aggregate hub facility within the Southampton area.

2.25 A strategic land reserve on the western shore of the River Test / Southampton Water is safeguarded in the adopted HMWP so that consideration can be given to its use as an aggregate / waste wharf site if it becomes available in the future.

2.26 Alongside this, Marchwood Military Port located on the River Test opposite the Port of Southampton, forms part of the proposed Solent Freeport[11] which is crucial to the future economic prosperity of the area and has wider regional and national importance.

2.27 The successful proposal was submitted by the Solent Local Enterprise Partnership (LEP- on behalf of a collation of businesses, local authorities and

[11] Solent Freeport - https://solentfreeport.com/

other partner organisations in response to a competitive process designed to establish a number of UK Freeports.

2.28 The Solent Freeport will benefit from tax reliefs, simplified customs procedures and a streamlined planning process to promote regeneration and innovation. The area will also be able to retain business rate growth to reinvest locally. The proposal has the potential to attract £2billion investment and create 52,000 jobs. It is part of the Freeport Bid (Freeport tax site)

2.29 The revised Seafront Masterplan Supplementary Planning Document (SPD)[12] for Portsmouth sets out a vision for the seafront area, provides strategic and detailed planning guidance, identifies further enhancement and development opportunities and highlights elements of the seafront that should be conserved. Now adopted it is a material consideration in planning decisions.

[12] Seafront Masterplan SPD (2021) - https://www.portsmouth.gov.uk/wp-content/uploads/2021/10/173.48-Seafront-Masterplan_Accessible.pdf

3. Minerals & waste movements in Hampshire

3.1 Hampshire has had a long history of mineral and waste operations. Such operations, together with their associated means of transportation, have created significant issues for Hampshire to deal with in terms of production, distribution and consumption within Hampshire boundaries and for the continuation of Hampshire's contribution towards exports to neighbouring authority areas.

Minerals

3.2 Hampshire has the capability of supplying aggregates from a number of sources including:

- Land-won extraction;
- recycled and secondary aggregate;
- dredging sand and gravel from the sea bed (marine-won); and
- importing aggregate (via rail depots and wharves).

3.3 The vast majority of mineral demand and consumption in Hampshire is principally based on construction material needs in the form of sand and gravel or hard rock aggregate (also referred to as crushed rock in other documents). Such aggregate demand arises from consumer requirements for housing, schools, hospitals, commercial premises, roads and many other related construction and infrastructure projects. The demand for construction materials is anticipated to rise based on the level of planned infrastructure. The latest Local Aggregate Assessment for Hampshire identifies a slight increase in the level of demand[13].

3.4 Much of the sand and gravel aggregate consumed in Hampshire had (until the 1980s) traditionally been generated from Hampshire land-won extraction sites and then transported by road to consumers. Land-won sand and gravel was then and still is today extracted from 2 types of site:

- **Quarries producing coarse aggregates** from river valley and plateaux deposits in South Hampshire, North East Hampshire and the New Forest; and
- **Sand pits producing soft and/or building sands** mainly from sites in the east around Bordon (and to a lesser extent from the New Forest and Test Valley). Imports of marine dredged sand and gravels to South Hampshire were also much evident before the 1980's, but the scale of these operations only really took on greater significance from new investments in larger dredgers etc. from the mid 1980's. Most consumers would have been within

[13] Local Aggregate Assessment 2021 - https://hants.sharepoint.com/sites/ETEE8681/Shared%20Documents/HMWP%20LAA%202021.pdf

Hampshire boundaries partly due to the then inferior major road network (compared with today) and also due to the commercial reality of pricing and competition on what are generally low-value consumer goods.

3.5 Mineral can only be worked where it is naturally found. There is a need to import some aggregate into Hampshire that is not naturally occurring. Hampshire has no crushed rock resources of its own and therefore relies on imports, predominantly from Somerset, who have confirmed that they cannot foresee any issues with ongoing supply. Supply is imported to rail depots running between Eastleigh and Fareham. On occasion, a small percentage is imported into Hampshire's wharves.

3.6 The mineral rights for marine sand and gravel are owned by the Crown Estate, up to the edge of the continental shelf. There are two dredging regions in proximity to Hampshire: South Coast (including Owers) and the East English Channel. As per the Marine Aggregates Capability and Portfolio 2021 from the Crown Estate[14], it is understood that there is 79.73Mt of good quality permitted reserves suitable for primary (construction) aggregate uses in the 'South Coast' region, and 56.52Mt of good quality permitted reserves suitable in the 'East English Channel' region.

3.7 The Crown Estate has indicated that based upon the 2021 10-year average annual extraction rate of 3.38Mt and the licences within the South Coast region, the life expectancy of the good quality primary aggregate reserves, can be assessed as being 23.60 years.

3.8 This suggests that there is an ongoing interest in marine won aggregate and therefore a continuing need for wharves to land the material.

3.9 Additionally, data[15] by the Mineral Products Association suggested that nationally, there could be a decrease in the demand for land-won aggregates over time, substituted instead by marine-won aggregate. Hampshire is considered to fit this scenario based on recent sales data, so it will be vital to ensure that the capacity of wharves and rail depots in Hampshire is able to keep pace with sales.

3.10 Sales data is usefully compared with that on past aggregate consumption. Aggregate consumption figures can be calculated from data published by the Department for Levelling Up, Housing and Communities (DHLUC) every four years as part of the Aggregate Mineral survey for England and Wales

[14] Capability & Portfolio 2021: Marine Aggregates (The Crown Estate, 2022) - https://www.thecrownestate.co.uk/media/3945/2021-capability-portfolio-report.pdf
[15] Long-term aggregates demand & supply scenarios 2016-30, Mineral Products Association (2017)

undertaken by the BGS. The latest survey comprises five years of data to account for the delay in conducting the survey. The movements in Hampshire are shown in Table 1.

Table 1: Total consumption of Primary Aggregate in Hampshire and Isle of Wight 2009, 2014 and 2019 (Thousand tonnes, Tt)

Hampshire & IoW	Land Won Sand and Gravel			Marine Won Sand and Gravel			Total Sand and Gravel			Crushed Rock			Total Primary Aggregates		
	2009	2014	2019	2009	2014	2019	2009	2014	2019	2009	2014	2019	2009	2014	2019
Imports	289	215	262	49	45	120	338	260	383	716	895	680	1,054	1,155	1,062
Consumption*	973	882	947	1,034	1,140	1,478	2,007	2,022	2,425	746	912	688	2,754	2,933	3,113
Consumption %	35%	30%	30%	38%	39%	47%	73%	69%	78%	27%	31%	22%	100 %	100 %	100 %
Imports/ Consumption %	30%	24%	28%	5%	4%	8%	17%	13%	16%	96%	98%	99%	38%	39%	34%

Source: Collation of the results of the 2009, 2014, and 2019 Aggregate Minerals survey for England & Wales (Department for Levelling Up, Housing and Communities (DLUHC)).
*Consumption is determined by total sold internally plus total imported

3.11 The comparison of 2009[16], 2014[17] and 2019[18] data in Table 1 indicates a trend for an increase in consumption of aggregate over the time period. Whilst consumption and imports of land-won sand and gravel decreased between 2009 and 2014 and increased to reach previous levels. It is the imports and consumption of marine-won sand and gravel that have significantly increased over the 10-year time period and contribute most to the overall increase in consumption. Data pertaining to crushed rock showed and increase between 2009 and 2014 of imports and consumption, however levels of both are slightly lower in 2019 than they were in 2009.

3.12 Nationally, the sales of primary aggregates have shown an increase, with total sales in England increasing by 8% between 2014 (137.0Mt) and 2019 (148.1Mt).

3.13 Reported sales of marine-dredged sand and gravel decreased nationally (18%) from 14.0Mt in 2014 to 11.4Mt in 2019. However, total landings of marine sand and gravel as reported by The Crown Estate increased (14%) from 11.8Mt in 2014 to 13.4Mt in 2019. As Hampshire has several wharves, this would account for the significant uplift in sales of marine sand and gravel and particularly imports.

[16] Collation of the results of the 2009 Aggregate Minerals survey for England and Wales - www.gov.uk/government/uploads/system/uploads/attachment_data/file/6366/1909597.pdf
[17] Collation of the results of the 2014 Aggregate Minerals survey for England and Wales - www.gov.uk/government/uploads/system/uploads/attachment_data/file/563423/Aggregate_Minerals_Survey_England___Wales_2014.pdf
[18] Aggregate Mineral Survey (2019) - https://www.gov.uk/government/publications/aggregate-minerals-survey-for-england-and-wales-2019

Waste

3.14 Data pertaining to waste movements was obtained from the Waste Data Interrogator for wharves and rail depots in Hampshire. The recorded tonnages of waste received is shown in Table 2.

Table 2 Waste movements in Hampshire

Site	LPA	Waste Received by year (tonnes)									
		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Tipner Wharf	PCC	330	85	357	-	91	-	-	79	36	51
Princes Wharf	SCC	97,193	107,662	114,832	28,453	87,072	87,256	103,368	106,260	104,692	93,775
Dibles Wharf	SCC	-	-	-	-	10,680	23,490	21,577	21,860	24,295	28,091
Solent Stevedores	SCC	-	-	-	-	367,389	-	-	-	386,799	478,585
		-	-	-	1,287,581	115,273	-	-	-	-	-
		798,758	313,466	707,543	-	-	-	-	-	-	-
Eastleigh Rail Depot	HCC	53,274	159,220	229,004	289,233	163,008	157,711	119,074	108,495	158,236	156,890
Total		949,555	580,433	1,051,736	1,605,267	743,513	268,457	244,019	236,694	674,058	757,392

* Solent Stevedores (i) King George V, (ii) Bulk Terminal, (iii) Berth 109 Western Docks

3.15 The summary totals of each year show a great deal fluctuation in the volumes over the last 10 years. The highest volume recorded was in 2014 at 1.6Mt. In comparison 2016, 2017 and 2018 showed the lowest recorded volumes at around 250,000 tonnes. Tonnages have consistently started to increase to date, although not to the levels previously recorded. But the data does show an upward trend.

3.16 There is a tendency for waste to be transported by vehicle as the cost implications generally mean that movements by rail are not cost effective. Eastleigh Rail Depot is an exception to this, whereby waste aggregate is brought to the rail depot for processing to aggregate. This is linked to rail operations and so makes this operation viable.

3.17 The metal recycling activity at Princes Wharf has been identified in the Port of Southampton Master Plan as a key operation, possibly because of the unique nature of the metal recycling site.

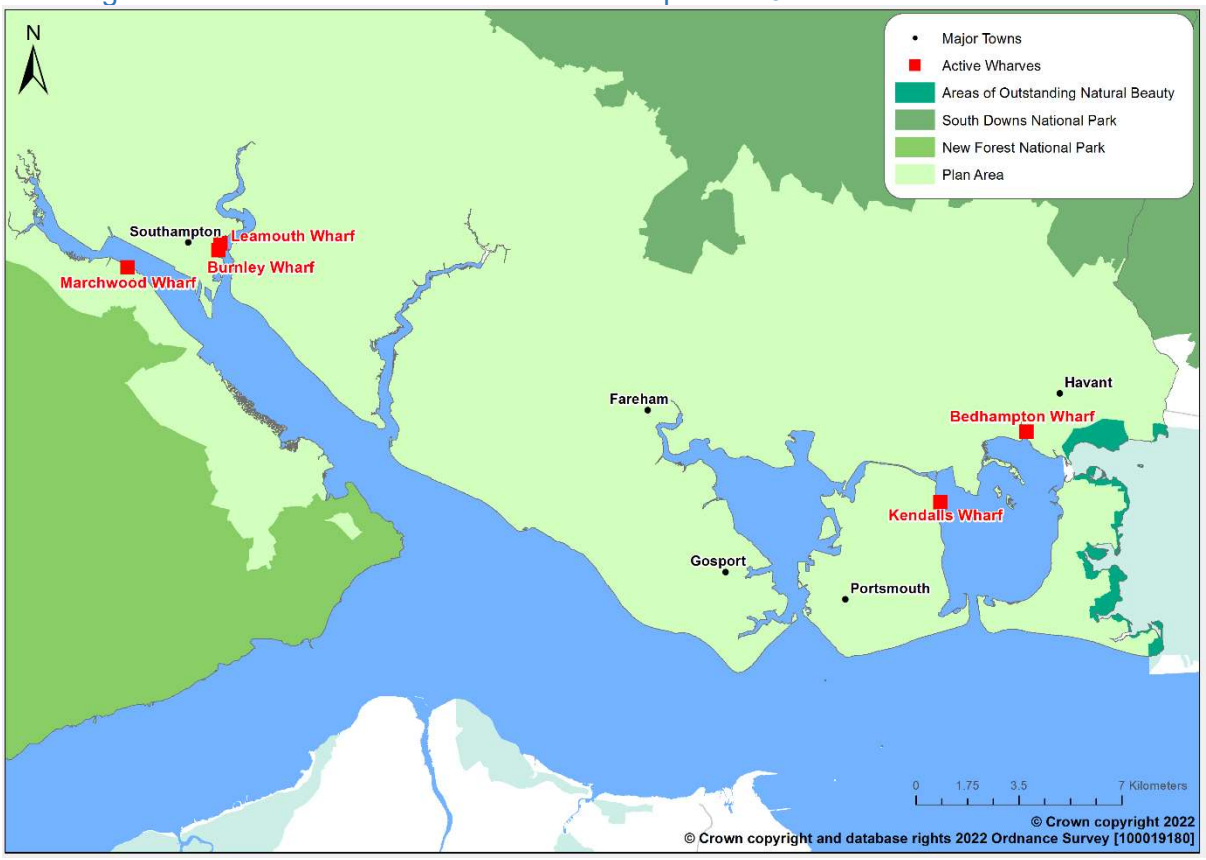
4. Wharves in Hampshire

Active Wharves

4.1 Hampshire has five active wharves located on the south coast of Hampshire, clustered around Southampton and Portsmouth waters (see Figure 1):

- Bedhampton Wharf, Havant
- Burnley Wharf, Southampton
- Kendall's Wharf, Portsmouth
- Leamouth Wharf, Southampton
- Marchwood Wharf, Marchwood

Figure 1: Locations of active wharves in Hampshire 2022



Bedhampton Wharf

4.2 Bedhampton Wharf is operated by Tarmac Ltd and was granted planning consent in January 1987. The wharf is located south of the A27 Havant Bypass in Bedhampton Quay. Bedhampton Quay is relatively small industrial park on the south coast of Hampshire, to the northern end of Langstone Harbour. A concrete batching plant was granted consent on an adjoining site. The plant has good highway access via the A27 and is deemed by the operator to be a successful plant.

4.3 In 2010 an application was made to import aggregate by road to the site, for use in the concrete plant operations. Marine aggregate landings were transferred to nearby Burnley wharf (also in the operator's control). This was a result of difficult trading conditions caused by the decline in aggregate sales at the time, likely due to the recession. Lower sales volumes increased the production costs per tonne of aggregate which in turn reduced the economic viability of the wharf.

4.4 There are also now practical issues with the operation of the wharf that mean the viability of the site is questioned. The current ship is too old and would need to be scrapped. Currently the vessel can only go into the wharf at 40% capacity because of the shallow nature of the water. Survey work is currently being undertaken, but it is anticipated that the results will show that the waterway will have silted up. Removal of this silt is a multimillion-pound investment. The alternative being a vessel suited to shallow water. The company has searched Europe for ships, only identifying two potentials – which also may not necessarily be available. The cost of a new ship to supply the wharf is estimated to be between £22-£25 million.

4.5 Langstone Harbour is not a commercial port. Therefore, the cost of any improvements would be borne entirely by Tarmac (rather than shared out between other users). This is prohibitively expensive given the scale of the operations taking place on site.

Burnley Wharf

4.6 The wharf is operated by Tarmac on the River Itchen. The marine aggregate landed at Burnley wharf mainly supplies Southampton and the wider Southampton market.

4.7 There are plans to make small improvements to the plant, including to the storage facilities in order to increase the tonnage that can be held on site. Currently the site can only hold a few days production of materials and therefore the site produces at maximum capacity. During the winter months or in periods of bad weather, it is common to encounter days where dredging cannot take place and therefore stockpiles are quickly diminished. Therefore, storage is key to ensuring business continuity and investment in the wharf to increase reliability of the plant.

4.8 However, the scope for any significant step change in storage capacity at the wharf is constrained by the land available. The only opportunity would be increasing operating hours of the plant. Current hours of operation are 7am to 6pm, but this is not restricted.

Kendall's Wharf

4.9 Located in Langstone Harbour.

4.10 It should also be noted that an application was submitted to extend Kendall's Wharf in Portsmouth. However, this application[19] has been withdrawn as the proposed compensation measures had not been approved by Natural England.

Leamouth Wharf

4.11 Leamouth Wharf is a freehold site, owned and operated by Cemex since the 1970s. The 1.68ha site is located on Leamouth Wharf in the Northam area of Southampton, within the City Centre. The site comprises both an aggregate depot and readymix concrete plant. The site sits within an established heavy industry area with wharves to the north and south of the site along the River Itchen.

4.12 Cemex owns licences with the Crown Estate to dredge material in the Channel and on the east coast. Most aggregate landed at Leamouth Wharf comes from the mid-channel area and Isle of Wight dredged banks. All of the fleet land material at Leamouth wharf, as well as Brighton and Poole also owned by Cemex outside of Hampshire.

4.13 The material landed at the wharf serves a 20-mile radius market. Deliveries are made to Winchester utilising the M3 corridor. It has been noted by the operator that as the general supply of material in the area diminishes, materials will travel further, for example into Berkshire.

4.14 The Itchen Bridge limits the height clearance of vessels able to access the site. In addition, there is limited wharf frontage in order to ensure vessels can get alongside. The depth of the water also poses a constraint and timing with the tides is important.

4.15 Cemex own a fleet of dredgers (4 vessels). A new ship currently sitting in Shoreham docks is joining the fleet. The new vessel is slightly larger, with a bigger payload but no bigger in terms of draft. However, it offers a significant CO_2 saving and contributes to the company's sustainability targets in reducing the carbon footprint. The fleet land material at Leamouth wharf, as well as Shoreham docks and service other operations in France and Holland.

[19] 17/01676/FUL | Construction of 50m quay wall as a continuation of the existing quay and provision of rock armouring at northern end to form a revetment; and construction of a 4m by 4m dolphin structure with linking walkway 25m to south of existing quay | Kendalls Wharf Eastern Road Portsmouth PO3 5LY

4.16 The site includes a readymix concrete batching facility and aggregate processing plant and has the capacity to process circa 500,000 tonnes of material per annum. However, this is based on the current plant which is old and needs upgrading.

4.17 A planning application has been submitted to Southampton City Council to update and replace all equipment on site[20]. The application seeks permission to reorientate operations on site to allow a better flow of vehicles (stacking to prevent waiting on roads), storage of materials, increase productive capacity on site, store dredged material on site and 24 hours per day and 7 days per week permission for vessels coming in on tide (exit on ebbing tide).

4.18 Aggregates are currently stored at the northern end of the site, where they are loaded and unloaded onto ships and trucks. Loading and unloading of vessels is based on tides, and so this part of the operation currently takes place on a 24/7 basis. However, it is likely that any new planning permission would contain planning conditions restricting vehicle movements and processing of material due to nearby residential flats and so this element of the plant may be restricted.

4.19 Subject to planning permission, the improved design and increased capacity of the plant facilities (for example slightly larger screens and conveyors and two loading shovels) would enable the site's overall capacity to increase to circa 800,000 – 1,000,000 tonnes.

4.20 The proposals also include improvements to the readymix plant, which would enable the capacity to increase production levels.

4.21 The level of investment in the site by Cemex demonstrates confidence in the site and the significant permitted marine reserves in the Channel. Leamouth wharf is seen by Cemex as a crucial site for long-term supply of marine aggregate.

Marchwood Wharf

4.22 Marchwood Wharf is operated by Tarmac and located in the waters of Southampton Port. The wharf is located on the Marchwood Industrial Park, on the south side of the River Test and between the Marchwood Power Station and the Marchwood Military Port facility.

[20] 21/01601/FUL | Redevelopment of the existing concrete plant and aggregates depot including new plant and alterations to the layout and access to increase site capacity for aggregates processing and concrete batching | Sea Dredged Aggregate Plant Leamouth Wharf Belvidere Road Southampton SO14 5RF

4.23 Tarmac Marchwood Wharf Southampton Marine Aggregates supply high quality aggregates to customers in the Southampton area.

4.24 The overall wharf amounts to 3.5ha in total. The wharf is used for the importation of marine aggregates and has an aggregate washing plant and concrete batching plant on site.

4.25 Permission was granted in 2015 for an asphalt plant on an area of land previously occupied by the aggregate bagging facility. The majority of the material used in the manufacture of asphalt was proposed to be brought to site by ship and unloaded across the existing wharf.

4.26 The existing wharf regularly operates 24 hours per day and 7 days per week in order to unload ships on the tidal wharf. This is in line with operations by other business within the Marchwood Industrial Park.

Inactive wharves

4.27 There are some wharves in Hampshire that have been active in the past, with recorded landings of aggregate. For a range of reasons, they are not currently operational. However, they retain the infrastructure on site so that they could be reactivated should the need arise. These are termed ‘inactive wharves’.

4.28 Infrastructure and the wharf itself are still in situ, but there are no aggregate movements through the wharf site. These sites are discussed in more detail below.

Fareham Wharf

4.29 The wharf is owned and was operated by Tarmac Plc Marine Aggregates. The Wharf had been used historically by Tarmac for the importation and processing of marine aggregates by barge and their sale and dispatch by lorry to construction sites in the area. Following a review of the operations at Fareham by the operator Tarmac, it was decided to cease operations at the wharf as it was considered to be uneconomic to maintain such an operation. The withdrawal of the safeguarding status of the wharf has been sought to allow future development of the site. Information has been submitted to support the case.

4.30 The Mineral Infrastructure Safeguarding Assessment (2020) submitted in relation to the safeguarding request outlines the issues that resulted in the decision to close the wharf. These are summarised as:

- the small physical size of the wharf (with no scope to extend);
- operational capacity and location of the site, including:

    - its relationship to the local road system and the accessibility constraints that arose from the latter, especially in relation to the operation of HGVs;
    - riverine constraints, arising from the depth, tidal character and ecological protected status of Fareham Creek and the consequent constraints on dredging, set against the progressive increase in the size, displacement and draught of aggregate delivery barges;
    - ship access to the wharf, which is along a shallow channel, is extremely difficult or impossible for modern-day aggregate dredgers. Modern dredgers have increased significantly in size in recent years to enable them to operate efficiently, economically and land sufficiently large loads of aggregates to remain competitive. The increased vessel draught associated with the larger sized dredgers means they cannot negotiate the shallow channel to Upper Quay Wharf preventing access to many vessels. This means the Wharf can only be served by small barges which are not considered to be financially viable and are ill suited to venture far out into the English Channel where much of the marine aggregates are now dredged.
- the escalating cost of maintaining an ageing facility, including the need for major repairs/replacement of the river wall and to replace on-site processing equipment; and
- limitations on the operation arising from its impact (including noise and air quality) on the amenity of immediately adjoining residential neighbours.

4.31 The issues listed above resulted in the decision by Tarmac to completely cease operations at the site. The wharf has been closed since 2018 and Tarmac have confirmed that the site will not be re-opened as an aggregate wharf.

4.32 In the years leading up to the closure, sales were decreasing. Written confirmation from Tarmac confirms that these sales have been absorbed at the other wharves operated in South Hampshire by Tarmac. Through the evidence set out in the Safeguarding Assessment, it has been demonstrated that the infrastructure is no longer needed by the current operation and that the capacity once provided by this wharf has been absorbed by other wharves in south Hampshire. This means that there is numerically no loss in wharf capacity.

4.33 The marketing report demonstrates that the site has been marketed over the last two years, but that there have been no successful offers on the basis of the current lawful use established for the operation as a minerals wharf and it has been suggested that buyers have been deterred by the site's safeguarding status.

4.34 Based on the information provided by Tarmac which met the requirements of adopted Policy 16 (Safeguarding – minerals infrastructure), Hampshire County Council as Minerals Planning Authority agreed in principle to relinquishing the safeguarding of Fareham wharf to enable future development of the site should a proposal for another purpose come forward. Until that time the wharf would remain safeguarded based on Policy 34 (Safeguarding potential minerals and waste wharf and rail depot infrastructure) of the adopted HMWP.

Tipner Wharf

4.35 Tipner Wharf in Portsmouth is planned to be redeveloped. This regeneration proposal was recognised in the adopted HMWP and therefore, the site was not safeguarded.

4.36 While both Pounds Wharf and Tipner Range have the potential to be utilised as minerals and waste wharves these areas were not included in the HMWP due to Portsmouth City Council's long-term objectives to regenerate the Tipner area.

Solent Gateway (Marchwood Military Port)

4.37 Marchwood Military Port is on the River Test opposite the Port of Southampton. Military operations at what was Marchwood Military Port have declined in recent years. Marchwood Port falls within the Port of Southampton which is operated by Associated British Ports (ABP).

4.38 In 2017 the Ministry of Defence awarded the applicant (Solent Gateway Ltd) a 35-year (to 2051) concession to manage the military movements through the port whilst also opening the site for commercial port use.

4.39 An application[21] is currently being considered by New Forest District Council for the development of the site as a commercial port. The application was

[21] 21/11156 | Hybrid planning application for the development of land at Marchwood Port (existing classes B2, Class B8 and ancillary uses) for additional development to support the proposed use of the land for port and port related uses comprising: An application for full planning for the demolition of existing buildings and creation of additional hard standing (Class B2 (Industrial)/Class B8 (storage & Distribution), including ancillary offices (class E(g)) and ancillary security staff welfare and facilities; highway & railway improvements; perimeter and internal fencing; ecological enhancement areas; landscaping & infrastructure; enabling and earthwork's; utilities and associated works (Phase 1 works and specified plots - Plots S1; Plot A1.1, Plot A1.3, Plot A1.4 Plot A1.5; Plot M2 and Plot A2 (enabling works)). Outline application for demolition of existing buildings; additional hard standing (Class B2 (Industrial)/Class B8 (Storage & Distribution), ancillary security and staff welfare & facilities; warehousing (Class B2(Industrial)/B8(storage & Distribution); circulation and access improvements; vehicle parking & servicing; lighting, plant infrastructure and associated works (Details only of access) (Remainder of the site). | MARCHWOOD MILITARY PORT, CRACKNORE HARD, MARCHWOOD SO40 4ZG (NB: PROPOSED LEGAL AGREEMENT) (newforest.gov.uk)

presented at committee on 9 February 2022 with the recommendation of the local planning authority to grant permission subject to:

first referring the application to the Secretary of State to consider whether to issue a Direction under section 77 of the Town and Planning Act 1990; the completion of planning obligations entered into by way of Section 106 agreement; and the imposition of conditions set out in the report.

4.40 The application site is 82.8ha in size and has road access from Cracknore Hard Lane. It is bounded by the River Test to the east, and Cracknore Hard Stream to the north-east, Normandy Way and Cracknore Hard Lane to the north, and Marchwood Village to the north west. The New Forest National Park is located on the south western boundary and the site is also bordered to the south and south-east by woodland and the Dibden Bay Site of Special Scientific Interest (SSSI). The site is adjacent to the designated SSSI, Special Protection Area (SPA) and Ramsar sites and on the south eastern boundary is Dibden Bay.

4.41 The site is of importance as it has a quayside served by two operational jetties (Falklands Jetty and Gunwharf Jetty) which provide access to the River Test. A third existing jetty, Mulberry Jetty, is in a managed state of decline and is currently not able to support commercial operations.

4.42 In addition, the Fawley branch railway line enters the site from the main National Rail line at the western end of the site. The site benefits from some existing rail pathways to the branch railway, which are essential.

4.43 Having both wharf and rail combined at one site provides a unique opportunity to land aggregate and transport aggregate by rail, potentially to a wider market area with rail lines extending to London and the Midlands.

4.44 Should rail not be used as a method of transporting aggregates, the site benefits from well-established access to the major road networks.

4.45 The current application includes an aggregate use element; aggregate storage, handling and processing plant, asphalt and concrete batching plants are proposed as part of the outline application.

4.46 Furthermore, the site forms part of the proposed Solent Freeport[22] which is crucial to the future economic prosperity of the area.

[22] Solent Freeport - https://solentfreeport.com/

Future potential sites

4.47 The safeguarded area 'land located to the north west of Hythe' (also known as Dibden Bay) has been included as a strategic land reserve in the Port of Southampton Port Master Plan – Consultation Draft which was published by Associated British Ports (ABP)[23] in 2016.

4.48 The draft Master Plan covers 2016 to 2035 and recognises that the strategic land reserve is safeguarded through adopted Policy 34 (see 'Safeguarding potential minerals and waste wharf and rail depot infrastructure'.

4.49 Should this proposal come forward, consideration will need to be given to the provision of a minerals (and possibly waste) wharf as part of the development. This could have wider implications for existing wharves in the Southampton area. Should the capacity be viewed as a replacement to existing wharf capacity, these sites may be viewed as potential waterside regeneration sites.

4.50 The Port of Southampton Master Plan indicates that if such a facility were developed in the Southampton Water area which simply consolidated existing trade in this area, then throughput in the region of 750,000 to 800,000 tonnes would be likely. A more extensive South Coast Hub facility would, however, have a throughput of 2.5 to 3Mt.

4.51 The Southampton Core Strategy will promote and facilitate future port growth within the existing port boundaries, as outlined on the proposals map in the plan. This future potential is safeguarded through Policy 34.

4.52 Similarly, development that strengthens the marine sector and supports the commercial port will be supported on land within the commercial port in Portsmouth and HM Naval Base (that become surplus to the needs of the Ministry of Defence). Alternative uses that provide marine related employment, which could include aggregates or waste, will be supported. The future potential on this land is safeguarded through Policy 34.

Constraints to wharf development

4.53 Numerous constraints to operations were identified through discussions with wharf operators. The main issues are outlined below.

[23] Port of Southampton Port Master Plan 2016-2035: Consultation Draft (Associated British Ports, 2016) - https://www.southamptonvts.co.uk/Port_Information/Commercial/Southampton_Master_Plan/

Depth of water

4.54 The depth of water impeding access to wharves was raised as a recurring issue. In some instances, this was due to wharves being located upstream in shallow waters. The tidal effect of waters affected most wharves, meaning that access could only be achieved at certain times of the day and night. This poses an issue in areas with neighbouring residential development as the noise impacts are considered a disturbance. Any restrictions to wharf operations to mitigate this timing impact severely impacts the wharf viability.

4.55 The type of vessel (requiring a low draft) can be a constraint. Some operators cite having a wide search and only matching a small number of vessels that might be suitable. The alternative is to reduce the loading of vessels. This again reduces the potential throughput of the wharf or increases production costs through multiple trips. Vessels in other regions of the South of England, such as London have a much greater payload: 10,000 tonnes.

Bridge height

4.56 Other infrastructure can pose potential constraints for the size and type of vessel that can be used at wharves. The height of bridges can impede access, especially at certain points on the tide. The Itchen Bridge is one such example.

4.57 There have been proposals for a flood defence wall alongside some wharves such as Southampton. It will be important to ensure that such a feature does not restrict the ability of existing operations to continue.

4.58 The Haslar sea wall along the Gosport peninsula is in need of urgent repair work due to erosion. The sea wall is vital to prevent the rapid silting of Portsmouth Harbour. In the event of this happening, it would make the harbour inaccessible to large vessels.

Ageing Infrastructure

4.59 The age of the wharves operating in Hampshire will start to present issues in terms of ageing wharf infrastructure. The cost of repairs or upgrades are substantial and as in some cases can present viability issues, as demonstrated at Fareham Wharf which resulted in closure.

Housing Needs/ Urban Regeneration/ Encroaching Development

4.60 It is important to plan for housing and other development and regeneration needs to be in sustainable locations. However, encroaching development, particularly residential development has presented wharf operators with

difficulties. Noise and associated traffic can generate complaints to existing operations or objections to planning applications. This can result in production capabilities being restricted through hours of operation. The introduction of the 'agent of change' principle in the NPPF[24] should limit the likelihood of further residential development introducing new restrictions.

4.61 Some wharves are set within industrial land, but concerns were raised that should further industrial land be released for housing development this would pose a significant constraint.

4.62 Similarly, it was suggested that consideration needed to be given to regeneration aspirations of both Southampton and Portsmouth City Councils could present further conflicts with existing operations at wharves. Some of the wharves lie in sustainable city centre locations where it is important to deliver new housing and commercial development to promote regeneration objectives, and so a careful balance needs to be struck.

Highway Network

4.63 The onward movement of aggregates from wharves is largely dependent on vehicle movements. The highway network is a constraint, in terms of the ability of some of these sites to gain access at all times required and to ensure the small sites can accommodate vehicles. Generally, there was a consensus that there is capacity to increase movements in line with operations.

4.64 Changes to the highway network could impact wharf operations. Air Quality Management Areas were declared in Southampton and Portsmouth. Any vehicle routing or restrictions would impact operations, particularly if there was an increase in cost.

4.65 Clean Air Zones have been declared in Portsmouth[25] and Southampton[26]. In Portsmouth a charging zone was implemented in 20201 in which a 3km area in south-west area of Portsmouth would incur a for driving in. The cost implications could have serious implications for businesses reliant on HGV movements. Charging has not been implemented in Southampton. However, it was considered as one of the options for tackling air quality.

[24] NPPF (Para. 187) - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf
[25] Clean Air Portsmouth - https://cleanerairportsmouth.co.uk/
[26] Clean Air Southampton - https://www.southampton.gov.uk/environmental-issues/pollution/air-quality/clean-air-zone/

4.66 Some wharves operate under older planning permissions, which benefit from unrestricted movements. There are concerns by operators that as applications come forward to redevelop or improve sites, that the sites would then be restricted.

Impacts of departure from the European Union

4.67 As part of the survey, operators were asked if aggregate sales or operations were impacted by departure of the UK from the European Union ('Brexit'). It was widely reported that this departure had caused uncertainty in the construction industry and some projects were delayed in a bid to minimise risk.

4.68 In Hampshire this uncertainty was reflected in lower 2019 sales of aggregate, both marine and land-won.

4.69 Some operators confirmed that there had been a resultant impact on the market, with some projects not started or delayed.

4.70 Another observation was that procurement for obtaining spare parts for both the wharf and vessels has taken significantly longer. It was unclear whether the delays could solely be attributed to the departure from the European Union, or the delays encountered through the Covid pandemic (starting in 2020), or a combination of both.

Wharf sales / landings

4.71 Table 3 shows the marine-won sand and gravel sales in Hampshire taken from the latest published Local Aggregate Assessment for Hampshire[27]. To provide a more complete picture of sales trends data has been included from both the most recent 2021 LAA and the 2014 LAA. Data is obtained through the Aggregate monitoring surveys for those years.

[27] https://www.hants.gov.uk/landplanningandenvironment/strategic-planning/hampshire-minerals-waste-plan

Table 3: Marine- won sand and gravel sales in Hampshire, 2011-2020 (Million tonnes, Mt)

Historic sales data	
Year	**Sales**
1998	1.53
1999	1.64
2000	1.62
2001	1.7
2002	1.72
2003	1.76
2004	1.62
2005	1.44
2006	1.54
2007	1.69
2008	1.44
2009	1.08
2010	1.12

Current 10-year sales data	
Year	**Sales**
2011	1.17
2012	1.1
2013	1.43
2014	1.36
2015	1.55
2016	1.55
2017	1.52
2018	1.42
2019	1.34
2020	1.35

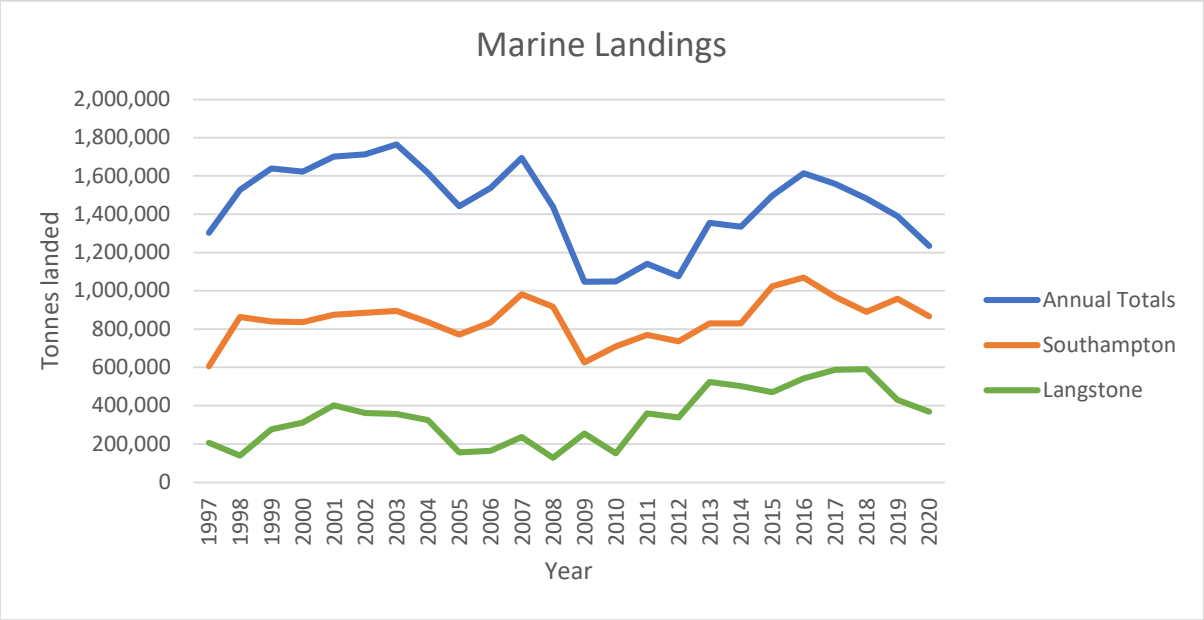
4.72 The ’10-year average sales’ figure is often utilised as a guide to overall trends as it is considered to even out any fluctuations in year-on-year data. The 10-year average sales figure (2011-2020) is 1.38Mt. The 3-year average is often used to indicate short term trends in sales, shown between 2018 and 2020 to be 1.37Mt. The comparison of these two figures shows that sales have not been as varied in the second half of this data set.

4.73 The range between the sales figures in the remainder of the data set is 0.68Mt (Highest 1.76Mt, Lowest 1.08Mt). Whereas in the more recent 10-year data set the range is 33% less than this at 0.45Mt (Highest 1.55Mt, Lowest 1.1Mt).

4.74 The level of fluctuation is demonstrated in Figure 2 which shows the marine landings between 1998 and 2020. The extreme highs and lows can be clearly identified; the highest sales in 2003 along with the lowest in 2009.

4.75 It can also be seen that the more recent trend since 2014 does not have the same peaks and troughs and has maintained a steady level.

Figure 2: Marine landings in Hampshire 1998 – 2020



Source: Crown Estate Annual Statistics data 1997-2020

4.76 The Crown Estate publish data annually on the landings of aggregate made in each region and are reported in the 'Marine Aggregate – Summary Statistics'. For Hampshire, this is the South Coast region made up on a number of wharves. The key wharves being Southampton and those found in Langstone Harbour. In previous years data was also reported separately for Woolston, Fareham, Portsmouth and Bedhampton wharves.

4.77 The 2009 Wharves and Rail Depots Assessment reported this data as part of the capacity review. Table 4 contains this data and has been expanded to include all subsequent data published by the Crown Estate to date. Early sales data, where available has been included as this demonstrates some of the higher sales levels achieved at wharves. Based on the 2009 Assessment data, capacity for wharves had been based on the highest level of sales achieved at each wharf and headroom was determined taking into account how current sales compared to what could be achieved (based on past sales).

Table 4: Crown Estate Landings for wharves in Hampshire

Year	Soton	Woolston	Fareham	Portsmouth	Langstone	Bedhampton	Annual Totals
1989	1,188,686	150,144	53,477	322,371	97,839	361,338	2,173,855
1990	1,026,985	185,174	40,512	161,750	154,325	279,763	1,848,509
1991							
1992							
1993							
1994							
1995							
1996							
1997	605,725	60,906	61,248	173,778	205,637	193,186	1,302,477
1998	863,468	59,028	45,866	200,568	139,598	216,705	1,527,231
1999	839,775	89,681	41,355	66,536	276,184	324,446	1,639,976
2000	836,956	63,016	28,600	68,254	311,727	311,414	1,621,967
2001	874,103	78,058	48,992	44,349	402,373	250,411	1,700,287
2002	884,808	86,544	43,398	48,496	362,055	285,702	1,713,005
2003	894,930	98,570	49,334	29,841	356,853	333,368	1,764,899
2004	836,414	97,011	40,963	27,247	325,350	287,559	1,616,548
2005	771,954	83,456	30,712	167,006	155,338	232,003	1,442,474
2006	834,453	89,582	22,593	210,650	164,819	212,768	1,536,871
2007	981,896	80,896	20,209	156,304	235,589	217,301	1,694,202
2008	917,191	33,414	15,649	185,508	127,250	158,169	1,439,189
2009	625,690	10,704	22,268	7,955	254,101	125,682	1,048,409
2010	709,836			186,600	150,794		1,049,240
2011	770,189			9,929	359,147		1,141,276
2012	736,557				337,720		1,076,289
2013	829,023				523,019		1,354,055
2014	830,454				501,845		1,334,313
2015	1,024,214				470,817		1,497,046
2016	1,069,656				541,981		1,613,653
2017	969,295				587,464		1,558,776
2018	889,401				591,253		1,482,672
2019	958,897				429,348		1,390,264
2020	865,711				367,480		1,235,211

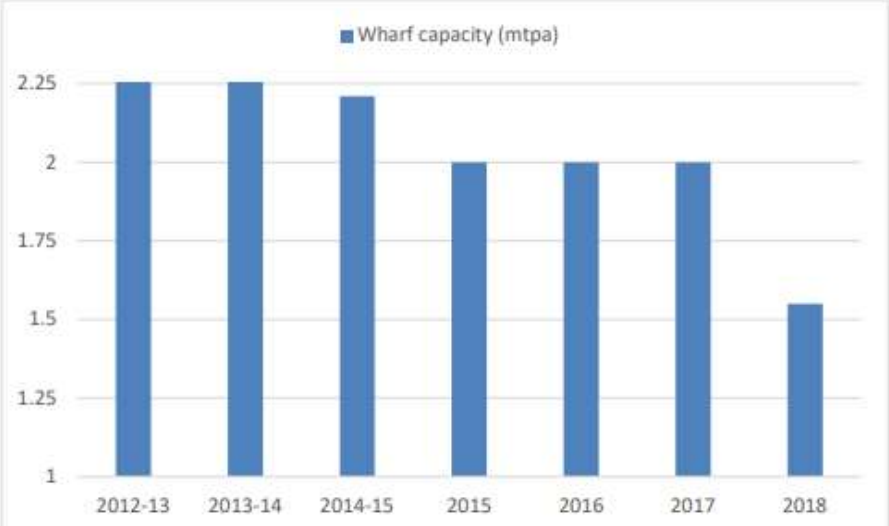
4.74 The marine aggregate landing data contained in Table 4 mirrors the same trends shown in the marine aggregate sales data for Hampshire, except that it extends over a greater time period. There are some small discrepancies between the figures.

Wharf Capacity Review

4.75 Policy 19 (Aggregate wharves and rail depots) of the adopted HMWP (2013) seeks to ensure that there is sufficient wharf and rail capacity for the importation of marine-won sand and gravel and other aggregates. Capacity is to be provided by existing sites, allocated sites and criteria for determining new proposals.

4.76 The level of capacity of wharves from 2013 to 2020 saw a decline with no significant change between 2015 and 2017 as shown in Figure 3. However, in 2018, wharf capacity has declined further.

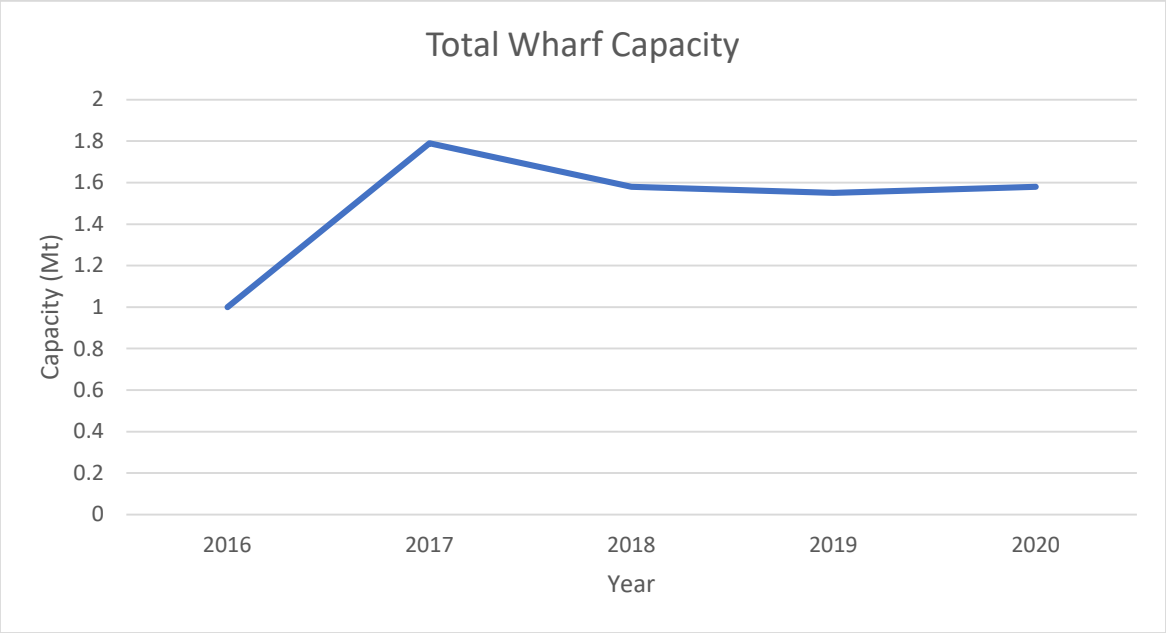
Figure 3: Wharf Capacity (mtpa)



4.77 In relation to wharves, the monitoring trigger is a reduction of more than 256,000 tonnes per annum (10% of 2.56 mtpa). A significant reduction (350,000 tpa (top estimate)) occurred during 2014-2015 with the loss of Tipner Wharf which was considered unsuitable for wharf operations.

4.78 It should be noted that from 2016, capacity has been surveyed through the Aggregate Monitoring (AM) survey. Prior to receipt of this data, capacity had been judged on the highest level of sales in previous years. It is recognised that circumstances may change at sites over time which can impact on capacity, and it is believe this is what has resulted in the reduction of capacity. In addition, a poor response rate from the wharves in 2018 (1/6 return) may be the cause for the further decline in capacity, as sales figures were used where data was absent.

Figure 4: Total Wharf Capacity in Hampshire



Source: Hampshire LAA's 2017-2021

4.79 Basing capacity on past sales resulted in capacity remaining unchanged for some time. However, the LAA monitoring data shown in Figure 5 shows decreasing wharf capacity since 2017 once the capacity was monitored through the AM survey.

4.80 It is recognised that circumstances may change at sites over time, or sites themselves can change or close. All of which can impact on capacity, and it is believed this is what has resulted in the reduction of capacity. Although the recent drop in capacity in 2018 suggests this is not the only reason.

4.81 Tipner Wharf in Portsmouth has now been redeveloped. This regeneration proposal was recognised in the adopted HMWP and therefore, the site was not safeguarded.

4.82 It should also be noted that an application was submitted to extend Kendall's Wharf in Portsmouth. However, this application has stalled as the proposed compensation measures have not been approved by Natural England.

4.83 No new wharf sites have been proposed. However, the safeguarded area 'land located to the north west of Hythe' (also known as Dibden Bay) has been included as a strategic land reserve in the Port of Southampton Port Master Plan – Consultation Draft which was published by Associated British Ports (ABP) in 2016. The draft Master Plan covers 2016 to 2035 and recognises that the strategic land reserve is safeguarded through adopted Policy 34 (see 'Safeguarding potential minerals and waste wharf and rail depot infrastructure'. Should this proposal come forward, consideration will need to be given to the provision of a minerals (and possibly waste) wharf as part of the development.

4.84 This could have wider implications for existing wharves in the Southampton area. Should the capacity be viewed as a replacement to existing wharf capacity, these sites may be viewed as potential waterside regeneration sites.

4.85 Capacity at wharves will become increasingly important in future years. A study by the Mineral Products Association suggested that nationally, there could be a decrease in the demand for land-won aggregates over time, substituted instead by marine-won aggregate. Hampshire is considered to fit this scenario based on recent sales data, so it will be vital to ensure that the capacity of wharves as well as rail depots in Hampshire are able to keep pace with sales.

4.86 Initial study work undertaken as part of the HMWP (2013) plan-making process indicated that there was sufficient capacity at wharves to accommodate a substantial increase in sales, as at the time of the study work sales at wharves had dropped considerably lower than those of previous years. As such, it was considered that there was headroom available to manage an increase in sales.

4.87 However, the most recent survey work completed as part of the Local Aggregate Assessment 2019 (which reports on wharf capacity) indicates this is not the case. Figures estimate that capacity is already working around 94%. Operating above 90% capacity offers little headroom or scope to adjust to meet any change in demand.

4.88 This places greater emphasis on the need to monitor the sales and capacity of wharves to ensure that the HMWP can respond positively to any changes in supply or demand. In doing so there may be a potential need to identify new wharf infrastructure, as outlined in Policy 34 (Safeguarding potential minerals and waste wharf and rail depot infrastructure) of the adopted HMWP to ensure a steady supply of aggregate.

4.89 Wharf capacity is therefore of vital importance to the delivery of the HMWP, in both the continuation of supply and facilities to land material contributing to supply.

4.90 The capacity figures calculated as part of the Local Aggregate Assessment are based on the figures provided by operators. Not all operators provide a capacity figure, so the data is only as reliable as the returns data. In those instances where a capacity figure if not provided, the figure is estimated using sales data. Whilst this is the most accurate figure reached for wharf capacity, a wider source of data will also be reviewed in the following section to assess the capacity in the wider context.

4.91 A summary of the wharf infrastructure in Hampshire is contained in Table 5. This includes wharves identified in preparation of the adopted HWMP and therefore, may no longer be operational.

Table 5: Summary of Wharf Infrastructure in Hampshire

Site	Operator	Use	Active/Inactive as a Wharf
Western Docks, Southampton	ABP Tenants	Predominantly Vehicle and Container Cargo	Active
Burnley Wharf, Southampton	Tarmac Ltd	Marine Aggregate Import	Active
Marchwood Wharf, Southampton	Tarmac Ltd	Marine Aggregate Import	Active
Leamouth Wharf, Southampton	Cemex	Marine Aggregate Import	Active
Dibles Wharf, Southampton	Axtell	Ready Mix Concrete	Inactive
Bakers Wharf, Southampton	N/A	Industrial Estate	Inactive
Princes/Drivers Wharf Southampton	European Metal Recycling Ltd (EMR	scrap metal recycling & exports	Active
Supermarine Wharf, Southampton	Former Aggregate Industries	None	Inactive
Willments Shipyard, Southampton	Assorted Tenants	Industrial Estate	Inactive
Upper Quay, Fareham	Tarmac Ltd	None	Inactive
Tipner Wharf, Tipner, Portsmouth	Maritime Solutions	Storage	Inactive
Kendall's Wharf, Portsmouth	Aggregate Industries	Marine Aggregate Import	Active
Bedhampton Wharf, Bedhampton	Tarmac Ltd	Marine Aggregate Import	Active

4.92 This shows a total of six inactive wharves (out of a total of 13), which equates to an operational capacity of less than half of all available wharves. The information outlined around each wharf has confirmed that the six inactive wharves are not likely to be re-opened and so could be considered as lost capacity.

4.93 The capacity provided by each of the wharves listed varies and many of the wharves lost are of a smaller scale. This means that wharf capacity has not been halved. However, numerically, a reduction of over half of the available wharves has significant flexibility implications. The number of options available to respond to market demands will have reduced and greater pressure and reliance is placed on operational wharves. Particularly when levels of marine sales have been maintained over the plan period and the trend looks set to continue.

4.94 It is acknowledged that every wharf was not of equal value in terms of capacity. Although there has been lost wharf infrastructure, as was detailed in the individual site commentary, some wharves have sought to increase capacity on site or operational capacity, meaning wharf capacity could have been increased.

5. Rail depots in Hampshire

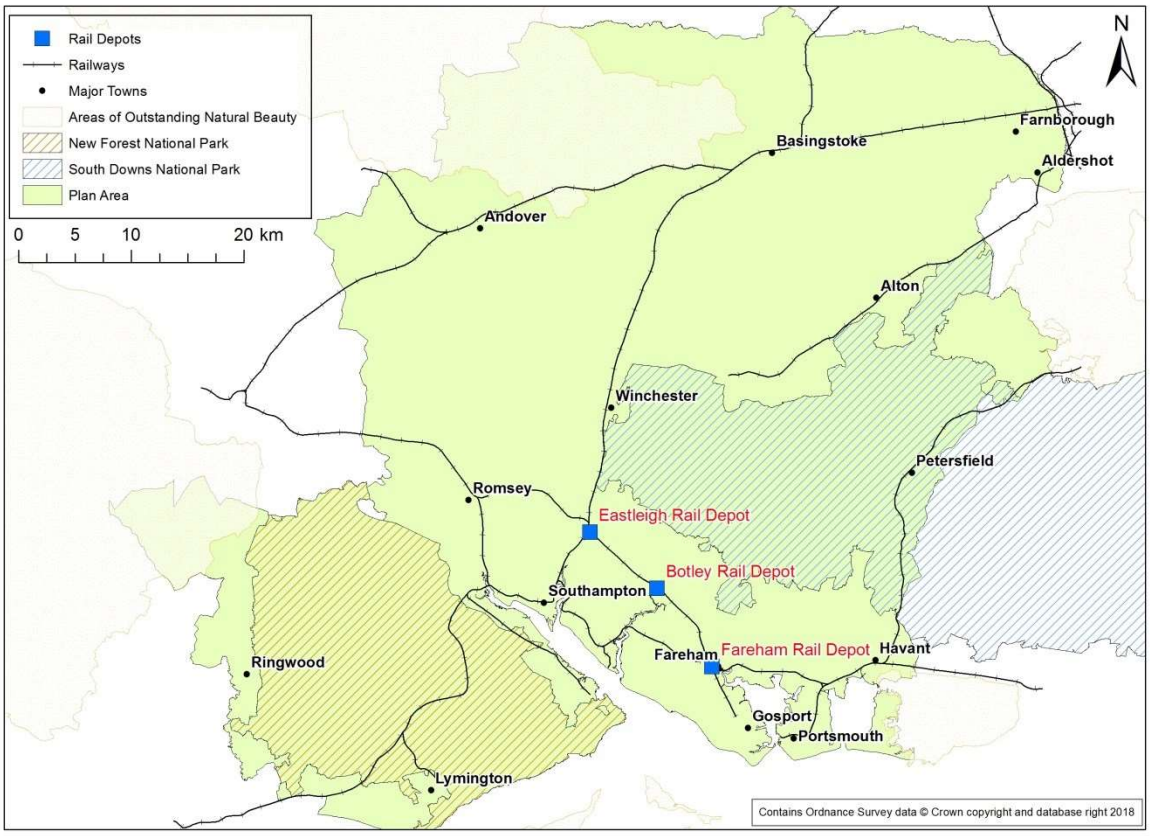
Existing Rail Depots

5.1 There are three existing rail depots used for the movement of aggregates as shown on Figure 5.

5.2 The previous 2009 Wharves and Rail depot Assessment identified that rail imports have been made to these depots (Eastleigh East, Botley and Fareham) for many years dating back to the 1970's.

5.3 Rail depots are mainly used to import crushed rock from Mendip quarries to Hampshire. Although there has been import of some sand and gravel in 2020. Consultations with operators for this assessment have not identified any other rail depot used for hard rock imports over the last 40 years.

Figure 5: Location of Rail Depots in Hampshire



5.4 Hampshire is geologically void of surface hard rock deposits for aggregate extraction. Hard rock aggregate requirements in Hampshire have always been met by a combination of road, rail and sea imports in various proportions. Most imports have historically been in the form of limestone by road and rail from the Mendips (Whatley/Merehead in Somerset) due mainly to the proximity of these

quarries to Hampshire for such materials. Mendip material is predominately brought into the Solent Area.

5.5 In 2020, 523,415 tonnes of crushed rock imported from Somerset was sold at the rail depots. The crushed rock sales (from rail and sea imports) in Hampshire recorded over the last 10 years are detailed in Table 6. Due to the commercially sensitive nature of this data, it is not possible to break down the data any further to show the volume throughput of solely the rail depots.

5.6 The crushed rock sales in 2020 were recorded at 0.52Mt which is a substantial increase on the 10-year average. Sales over 2019 and 2020 have been relatively steady, although both years are a decline from the peak of 2018. However, when reviewing the data, there is a clear uplift in sales volumes over the time period.

Table 6: Crushed rock sales from rail depots and wharves in Hampshire, 2011-2020 (Million tonnes, Mt)

Year (yr)	2011	2012	2013	2014	2015	2016*	2017**	2018	2019	2020	Last 10 yr average	Last 3 yr average
Sales	0.33	0.28	0.39	0.46	0.46	0.55	0.57	0.69	0.53	0.52	0.44	0.60

Source: Aggregate Monitoring Surveys, 2011-2020, *2016 data has been updated to include data from Fareham Rail Depot, **2017 data includes estimates to account for the lack of response from Fareham Rail Depot.

5.7 In May 2022 Somerset County Council confirmed that they have sufficient reserves to meet current needs and do not foresee any likely issues that would affect the future supply of crushed rock to the South East Region, which includes Hampshire. Should future demand increase, the issue lies with the capacity of the rail depots to manage a higher level of imports, rather than with future supply.

5.8 The existing rail depots handle a significant volume of aggregate, but it is important to note that they are all clustered in the south of Hampshire.

Eastleigh

5.9 Eastleigh is a key area for commercial freight movements. Eastleigh Chickenhall sidings is used for commercial aggregates traffic and is the rail depot referred to in the adopted HWMP.

5.10 Planning permission was granted in 1978 for a 'Limestone transfer depot from rail for local distribution by road'. The site is managed by Network Rail's tenants (Aggregate Industries). The site is a distribution outlet for a variety of construction materials and aggregates. The site fully utilises the rail sidings to import aggregates from Aggregate Industries' Somerset operations, limestone

crushed rock Mendip material. Aggregates are discharged via a Bottom Discharge Unit and transported to the relevant stock bay via a conveyor system.

5.11 In 1996 planning permission was granted for an 'aggregate recycling development'. Recovered track ballast and the recycling of inert concrete waste derived from various projects on the rail network has also taken place. The track ballast and concrete waste combined (up to 7,000 tonnes/week) is brought on site as and when Network Rail directs, and then crushed and/or screened into recycled aggregate - mainly for Network Rail's own use (90% transhipped by rail again) or for sale via Aggregate Industries adjacent depot (remaining 10%).

5.12 In addition, permission was granted for the erection of a concrete batching plant on the site in 2013.

Botley

5.13 Botley rail depot is operated by Aggregate Industries on the old goods yard adjacent to Botley Rail Station. The site is dissected by the Fareham to Eastleigh railway line.

5.14 The site operates a 'bottom discharge rail wagon system' and this portion of the site operations is located to the north of the railway line, where limestone crushed rock Mendip material is imported.

5.15 The aggregate storage and the asphalt manufacturing plant are located to the south. Material is delivered to markets within the Solent area (Southampton and Portsmouth) but deliveries are also made as far as Littlehampton to the east and Andover to the north.

5.16 Botley can only be served by the railway, due to the conveyor set up on site and so is considered a priority service by Network Rail. If there is no access by rail, the site cannot operate. Vehicles are unable to serve the site.

Fareham

5.17 The aggregate rail depot was established in 1971. The depot occupies a one-hectare site to the east of the main railway line. To the east of the depot at a lower level lies an extensive residential area.

5.18 The main throughput is crushed limestone rock Mendip material.

Future potential sites

5.19 There are two site allocations for rail depots in the adopted HWMP: Basingstoke Sidings and Micheldever Sidings. Whilst they are site allocations in the Plan, either site is yet to come forward.

Micheldever Sidings

5.20 Micheldever Sidings has been a site allocation in the current and previous Minerals and Waste Local Plan.

5.21 The site is owned by DB Cargo UK Ltd and is currently being marketed to secure an operator. The site has been vacant for a number of years. The understanding is that it would be beneficial to have a user on site, as it would help from a security point of view.

5.22 There are no issues with the current allocation of the site in the adopted HMWP (primarily for a potential aggregate depot but may also have some potential for waste uses). Discussions with both the landowner and Network Rail have concluded that there are no reasons that would prevent this site development provided a suitable operator came forward.

Basingstoke Sidings

5.23 A small site area to the west of the station comprised of the existing rail siding and adjacent land is proposed as an allocation in the adopted HMWP. This site is within a more built-up area in central Basingstoke, so is likely to encounter more difficulties with neighbouring development. Any application that came forward in this location would need to demonstrate how such impacts could be mitigated to protect amenity.

5.24 Discussions with Network Rail as the landowner confirmed that there are no reasons why Basingstoke Sidings could not continue to be allocated as a rail depot. However as outlined in the Plan, environmental and amenity criteria would need to be met should the allocation be brought forward.

Future potential allocations

5.25 A meeting was held with Network Rail to discuss both the existing rail depot allocations in the plan and any future changes to the network. A number of opportunities were discussed which are outlined in this section.

Holybourne

5.26 There is an existing rail depot currently associated with the Humbly Grove Oilfield. This has been used to transport oil and gas to Fawley. A small amount of Oil is still transported currently but operations have changed over time and there is likely to be no future demand for oil movements by rail.

5.27 The site is owned by iGas and is safeguarded as a rail depot linked with the existing Oil site Humbly Grove.

5.28 Network Rail have recently re-signalled the connection. Consideration has been given to remodelling the rail depot site as there are issues surrounding the length of trains that could be accommodated at the site, which could limit the future uses of the site (currently only accommodates 10 wagons).

5.29 As an aside, South Western Railways (SWR) are seeking to operate a passenger service in the freight path that was used for the Holybourne oil train. Owing to track layout restrictions at the Holybourne site, the previously operated oil train was required to run into Alton Station to allow the locomotive to change ends. This meant that in the hour of the day when the freight path was in the timetable only a 1tph (1 train per hour) passenger service could be operated from Alton and not a 2tph service as per the rest of the day.

5.30 Now that the oil train operations are limited, SWR would like to run a passenger service in that freight path so that they run 2tph all day. Currently, the second passenger service in that hour only operates between Farnham and London Waterloo. If SWR were successful in their aspiration, it would render the rail access of the Holybourne site useless as there would no longer be the ability for the freight locomotive to change ends at Alton station. This places more importance on a connection agreement. Additionally, any future remodel of the site could allow trains to turn without the need to go into Alton station.

5.31 A planning application for the rail depot has been recently submitted for use as an aggregate rail depot[28].

Andover

5.32 Network Rail have recently completed a project at Andover Sidings to develop the site for use as a rail depot. This has links to London and serves as an alternative to the mainline through Hampshire.

[28] https://planning.hants.gov.uk/Planning/Display/HCC/2022/0449

5.33 It is envisaged that an operator would lease the site for a temporary period during a project or construction period to allow the importation of aggregate and construction materials. Following completion of the project the site could be leased by another operator and continue.

5.34 Network Rail have highlighted that this site would be considered as a grouped 'aggregates/construction' site, including this as the most likely potential commodity for Andover freight operations.

5.35 This is an important point as moving forward, the rail and freight industry foresee a dual functionality use of depots rather than the traditional aggregate depots.

5.36 Network Rail have put the Andover Sidings site forward as a site nomination for inclusion in the Plan, subject to all assessment criteria being met. This would be an important site as the first in the west of the County.

Totton

5.37 The site at Totton is one of Network Rail's Strategic Freight Site listings (SFSS).

5.38 The site is currently occupied by Network Rail, but future plans for the site involve the relocation of existing operations to a site at Eastleigh.

5.39 There has been some customer interest for aggregate services at the site. The site already benefits from rail paths needed for movement of aggregates on the lines.

5.40 Discussions with Network Rail concluded that Totton sidings should be nominated as a potential aggregate depot in the site in the Minerals and Waste Plan given the strategic nature of the site.

Marchwood Military Port

5.41 Marchwood Military Port is on the River Test opposite the Port of Southampton and was outlined in detail under the wharves section. Military operations at what was Marchwood Military Port have declined in recent years and so there are ambitions to redevelop the port as a commercial venture.

5.42 The proposals for the site include an aggregate operation with rail connection. The site benefits from connection to the Fawley branch railway line, which enters the site from the main National Rail line at the western end of the site.

The site benefits from some existing rail pathways to the branch railway, which are essential.

5.43 Having both wharf and rail combined at one site provides a unique opportunity to land aggregate and transport aggregate by rail, potentially to a wider market area with rail lines extending to London and the Midlands.

5.44 Should rail not be used as a method of transporting aggregates, the site benefits from well-established access to the major road networks.

Brockenhurst

5.45 There are existing sidings by the station at Brockenhurst. There have been approaches made about other uses. However, road access to the station is narrow and HGV traffic not likely to be encouraged.

5.46 There is no certainty that the opportunities outlined above will come forward. Should any do so, they will be assessed in line with other criteria in the Plan to ensure that they are appropriate uses. Regardless, it is important to be aware of the future potential on the network.

Bevois Park

5.47 Bevois Park (also known as Southampton Up Yard) is owned by Network Rail and located within Southampton. The land is currently leased to L&S Waste and Tarmac as rail users, alongside a firm called DRS as non-rail users.

5.48 L&S Waste receive stone from the Mendips, although it is reported that the volume has dropped significantly in the last year. Tarmac have been operating at a lower throughput than previously.

5.49 The site is not considered a ‘strategic freight site’. However, being a Network Rail Freehold site, it is offered protection through ownership status.

Fratton

5.50 A rail freight terminal at Fratton to serve the Port of Portsmouth was established.

5.51 Fratton is classed as a ‘strategic freight site’ by Network Rail and so is protected as a rail depot by virtue of this status.

5.52 Portsmouth International Port invested in the development of this rail depot in around 2009/2008 to handle freight. However, the expected traffic of freight never materialised beyond a small number of trial trains to Eastleigh.

5.53 The site is currently utilised by Southwestern Railway (SWR) who make use of the freight siding as part of their Fratton depot activities. However, there is a requirement to return the site to freight activity if requested to do so.

5.54 The site has the potential to have a future as an aggregate terminal should an operator show interest.

Rail Network Changes

5.55 Network Rail have indicated that rail depots are to be considered as a grouped facility going forward. Previously most of the rail depots have been for a specific use.

5.56 Network Rail have used the most recent development at Andover to categorise the site as 'aggregates/construction' facility. The site would be used by a particular operator for a particular project, but in general it would be a construction freight operation which could include aggregates at some point.

5.57 This use of intermodal containerised freight and logistics opportunities will continue to be a growth area for rail-freight in the future, particularly in domestic intermodal operations as the current domestic intermodal network is best described as sparse. The Southern Region is exceptionally poorly represented in this market with no regional distribution centres (RDCs), so certain sites may appeal for this in the future e.g. Andover.

Poole Harbour

5.58 Whilst outside of Hampshire, Network Rail highlighted Hamworthy as a scheme with relevance to Hampshire and the wider area. It is detailed below to provide some useful context to the network.

5.59 The Hamworthy rail connection has, over time, deteriorated. Work is underway at Hamworthy to connect to Poole Harbour. The work is planned to be undertaken by Network Rail. Discussions have been held with an aggregate operator, to move marine aggregate from Poole Harbour towards London. It was felt there is a strong business case for this connection, with the marine aggregate element providing environmental benefits through the modal shift.

5.60 This scheme is of relevance to Hampshire because of the shared wider market area for aggregates and because of Hampshire's location on this proposed route.

Network Rail Study

5.61 A recent study undertaken by Network Rail in partnership with National Highways was published in June 2021[29].

5.62 The Solent to the Midlands Multimodal Freight Strategy gives a high-level overview of freight from the Solent to the Midlands on both road and rail. The ambition being to help facilitate a shift from the predominantly road-based transport of freight (including aggregates) to rail.

5.63 The Solent to the Midlands route is one of the most important freight corridors in the UK. It links the major port of Southampton with the numerous distribution centres and economic hubs of the Midlands, North and Scotland. The Solent Ports, particularly Southampton, are in favourable locations for connections to the global freight and logistics market due to their proximity to the main shipping lanes. The Midlands is home to a high concentration of large distribution centres and warehouses – the so-called 'Golden Triangle' of freight distribution.

5.64 The purpose of the study is to develop a long-term strategy for the movement of freight along the Solent to the Midlands corridor. Both organisations have a shared goal of keeping Britain moving, as well as obligations to meet the Government's commitment of net-zero carbon emissions by 2050. This Solent to the Midlands Multimodal Freight Study contributes to these goals by demonstrating how both networks could be used more efficiently in terms of their overall capacity and their carbon footprint.

5.65 Rail freight in the Solent area is focused almost exclusively at the Port of Southampton with over 32 trains per day on average arriving or departing. Construction materials (aggregates) make up 6% of rail freight services on the Solent to Midlands corridor compared to 29.1% of rail freight services in Great Britain overall.

5.66 Building upon this baseline understanding of the road and rail corridors and what freight is moved on them, an investigation of potential growth was undertaken. In all scenarios identified for rail freight growth there is expected to be an increase in the number of trains needed per day to meet demand from

[29] Solent to Midlands Multimodal Freight Strategy Phase 1 (June 2021) https://www.networkrail.co.uk/wp-content/uploads/2021/07/Solent-to-the-Midlands-Multimodal-Freight-Strategy-Phase-1-June-2021.pdf

the commodities already carried by the rail network; of between 5 and 20 trains per day to 2050.

5.67 Analysis was also undertaken around the potential for new or enhanced markets to make use of rail freight. Those identified of relevance to this topic paper include:

- Secondary materials and waste (recycled materials) is a significant commodity on this route. Rail could provide a more carbon and financially efficient way of transporting this waste for export whilst in the long-term, rail should be considered for transporting secondary goods to UK based recycling facilities. Network Rail and Highways England (now 'National Highways') should engage with ongoing workstreams around recycled materials taking place across the industry and make the case for rail as a mode for transporting these goods.
- Aggregate traffic is already a well-established market on rail. Network Rail and Highways England should work with the industry partners to assess how this existing established market can be expanded further.

5.68 The next phase due to be published later in 2022, helps to identify the infrastructure required to enable this shift change. This will have significant implications for Hampshire as the gateway to the Solent.

Constraints to rail development

Land

5.69 The land available for rail depots was cited as a major constraint. The existing rail depots were developed during the Victorian era on small areas of land alongside the railway line. Subsequent development over the years has limited the ability for any of these sites to be expanded or to readily identify new areas of land as potential facilities.

5.70 Further development of these areas for other uses, particularly residential has placed a significant constraint on the ability of sites to operate as a rail depot, noise being the number one concern. This is the case for Basingstoke sidings which has been a safeguarded rail depot, but encroachment of residential housing means the ability to operate as a rail depot in the future is constrained (safeguarding is considered further in Section 7 of this Paper).

Highways

5.71 Whilst some potential sites can be identified as rail-linked land, suitable highway access is a constraint. Often highway access is required for the

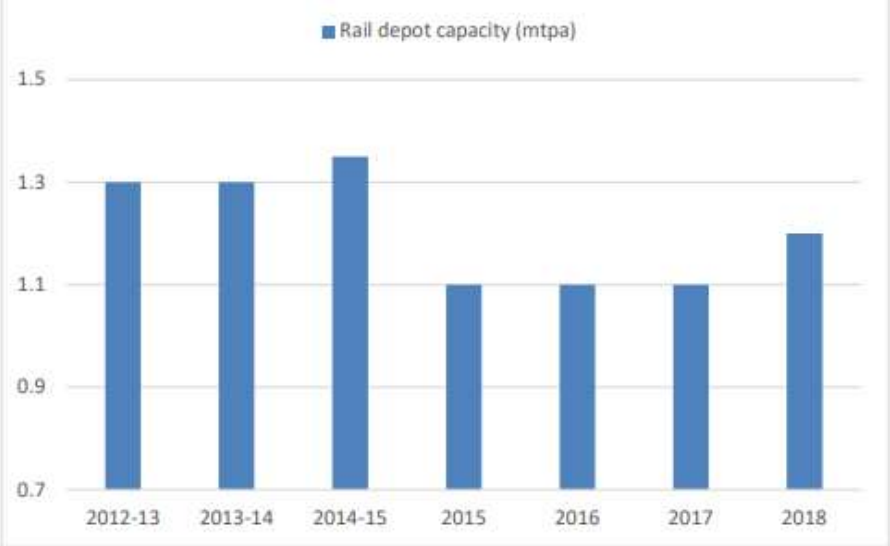
loading of aggregate into HGVs for an onward journey. Suitable highway access to the rail depot site and highway network is essential in planning terms to ensure safety and amenity of nearby residents.

5.72 Restrictions on the highway network can make the operation of a rail depot unsuitable. In addition, major amendments to the highway network can impede the ability of operations to continue, such as enforced routing or zoning as a result of the declaration of a zone (clean air zone, charging zone or similar).

Rail Capacity Review

5.73 Capacity of rail depots was assessed as part of the HWMP review[30] (see Figure 6). The level of capacity of rail depots from 2013 to 2018 saw a decline with no significant change between 2015 and 2017. However, in 2018, rail depot capacity increased slightly.

Figure 6: Rail Depot capacity (mtpa)

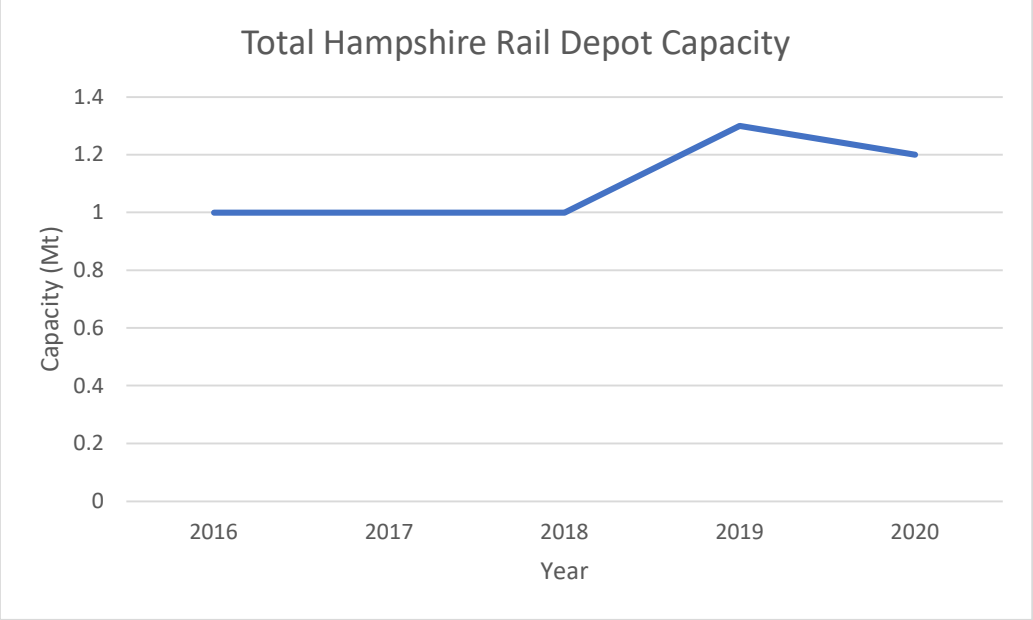


Source: 2020 Hampshire Minerals & Waste Plan Review

5.74 Capacity at rail depots has been more recently assessed as part of the Local Aggregate Assessment since 2016. This is based on returns data from operators and shown in Figure 7.

[30] Review of HWMP (2020) - https://documents.hants.gov.uk/mineralsandwaste/HWMP-2020Review.pdf

Figure 7: Rail Depot Capacity in Hampshire



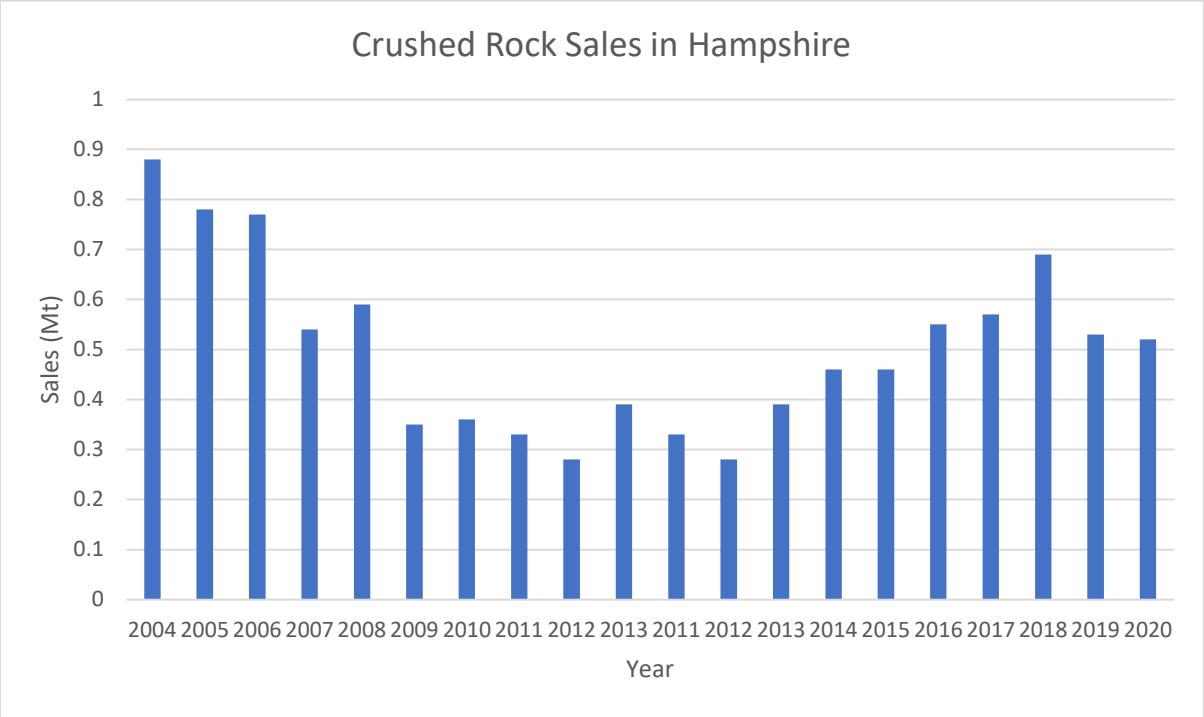
Source: Hampshire LAA 2017-2021

5.75 It can be seen that a capacity of 1 mtpa was maintained at the existing rail depots. No new rail depot proposals have come forward in the last 5 years, but capacity increased in 2019 and has remained at a higher level in 2020. The reason for this increase is not apparent.

5.76 When looking at historic data, higher operational capacity is clearly evident from sales data. Crushed rock sales data can be used as an indication of rail depot capacity since the majority of sales are made and recorded from rail depots.

5.77 Figure 8 shows the crushed rock sales recorded in Hampshire between 2004 and 2020. It should be noted this the sales may include a small proportion of movements by sea, but these are not significant. Sales in 2004 were the highest recorded but fell to lowest levels between 2009 and 2012. The data does evidence an uplift in sales, but no additional rail depot facilities have come forward, which suggests a much greater potential to expand. It is unclear whether this could be by as much as by 40% on the 2008 imports in response to market demand or whether any other changes in operations or infrastructure would prevent this.

Figure 8: Historic Crushed Rock Sales in Hampshire



5.78 Rail depot operators indicated some issues about lack of sufficient train pathways to deliver aggregate in periods of greater demand (which can be a problem for expansion at other south east rail depots) – and it is noted that all depots are effectively on the same main line.

5.79 Further evidence of the finite nature of freight train pathways was inferred in the Transport for South Hampshire Freight Strategy (2009) where it was stated that as passenger services take priority, freight services are effectively scheduled around them. It did identify there could be benefits in improving the freight capacity between Eastleigh and Fareham.

5.80 However, future freight services to and from existing rail depots may benefit from current ongoing improvements to the London/Southampton freight line route and the future Solent to Midlands corridor.

6. Future capacity requirements

Calculating Needs

6.1 Establishing Future Needs for Wharves and Rail Depots (Sections 1 and 2) provides a good background to the development of Hampshire's aggregate wharves and rail depots over the last twenty years or so and some information about other minerals and waste using wharves and rail depots. Establishing future needs for wharves and rail depots is a process reliant on best estimates where possible of future demand for minerals in Hampshire (and beyond) and also for dealing with Hampshire's own waste arisings (and some waste from elsewhere in the case of transhipment requirements).

6.2 As the evidence and information collected and made available for this assessment has been dominated by aggregates, the process of establishing future needs for other minerals and waste assumes the continuation of the status quo of existing wharf and rail depot facilities referred to in Section 2 throughout the plan period to 2040.

6.3 However, many of the existing aggregate operations were established more than twenty years ago with associated infrastructure of similar age and are on relatively small sites with limited flexibility to do anything else. This lack of flexibility may be the subject of some concern from a sustainability viewpoint.

6.4 In determining what the future needs are for aggregate wharves and rail depots there appear to be several key areas where there is a pre-requisite requirement to obtain the most relevant and accurate background information. These are:

- Forecasts for Hampshire's overall aggregate demand to 2040 and breaking this down into sub-areas where possible.
- Potential impact of increased or decreased aggregate imports by road.
- Likelihood of existing wharf and rail depot capacities being achieved consistently together.
- Likelihood of existing sites closing independently.
- Likelihood and opportunities for new larger and more flexible (multi-functional) sites with deep water berthing opening independently within the plan period.
- Likelihood and opportunities for co-ordinated approach by operators, landowners and/ or planners for the most sustainable strategic approach to aggregate imports into Hampshire and beyond.

6.5 Data relating to capacity of wharves and rail depots has been collected as part of the annual aggregates monitoring survey and is shown alongside sales data in Table 7.

Table 7: Total sales and estimated production capacity, 2020 (Million tonnes, Mt)

	Sales	Capacity	% Sales/ Production	Capacity 3 yr Average
Wharves*	1.35	1.63	83%	1.5
Rail Depots	0.54	1.275	42%	1.25

Source: Aggregate Monitoring Survey, 2020. Please note that capacity data collection is still in the early stages, and as such, results should be treated with caution.
Where capacity data has not been made available sales have been used.
*Wharf Capacity Data is based upon sales

6.6 The monitoring trigger for adopted Policy 17 (Aggregate supply – capacity and source) is a reduction of 556,000 tonnes in capacity. The 556,000 tonnes are a 10% reduction of the total aggregate capacity (including land won). The most significant lack in capacity is at wharves and land-won sites[31]. However, the ability to deliver the required land-won capacity is driven by Policy 20.

6.7 Policy 17 of the adopted HWMP set a provision rate of 2mtpa for marine aggregates and 1mtpa for limestone delivered by rail. On review of sales data for both, it is not proposed to amend these figures at this time.

6.8 Historically, sales of marine sand aggregates were much higher, which gave rise to the provision rate of 2mtpa set. This provision rate is significantly above current sales rates. Given that replenishment rates for land-won sand and gravel are low, there is the potential for more reliance on marine sand and gravel. A study[32] by the Mineral Products Association suggested that nationally, there could be a decrease in the demand for land-won aggregates over time, substituted instead by marine-won aggregate. Hampshire is considered to fit this scenario based on recent sales data, so it will be vital to ensure that the capacity of wharves and rail depots in Hampshire is able to keep pace with sales.

6.9 Currently the rail depots would appear to have sufficient capacity to cope with an increase. However, based on the survey responses received, wharves do not appear to have the same tolerance. The provision rate for marine aggregate is therefore aimed at allowing for flexibility.

[31] HWMP 2020 Review of the HMWP (Table 4) - https://documents.hants.gov.uk/mineralsandwaste/HWMP-2020Review.pdf
[32] Long-term aggregates demand & supply scenarios 2016-30, Mineral Products Association (2017)

6.10 Table 7 shows that despite the loss of capacity for wharves to date, the level of marine aggregate sales was sustained in line with market trends to date.

6.11 The estimated capacity is lower than the 2mtpa set out in policy, (although higher than recent sales rates) so it will be important to encourage any proposals which seek to increase wharf capacity in order to allow the provision rate to be met should market conditions require it. The ‘sales versus production figure’ highlights that wharves are operating very close to capacity with very little headroom to respond to any changes in market conditions.

6.12 For rail depots, the outlook is positive based on the data in Table 7. Sales are half the provision rates set out in Policy 17 with adequate scope in capacity to increase throughput should the market demand increase. This may be of increasing importance should there look to be an increase in modal shift from road transport of aggregates to rail.

7. Wharves and rail safeguarding

Local Plan safeguarding

7.1 The NPPF sets out the safeguarding requirement for wharves and rail depots. Paragraph 210 (e) states that minerals planning authorities should:

'safeguard existing, planned and potential sites for: the bulk transport, handling and processing of minerals; the manufacture of concrete and concrete products; and the handling, processing and distribution of substitute, recycled and secondary aggregate material'

7.2 Policy 19 (Aggregate wharves and rail depots) of the adopted HWMP lists the existing wharf and rail depot facilities which are specifically safeguarded in order to maintain sufficient capacity. The policy also sets out the proposals for further rail depots identified, along with the supportive policy position with regard to any new wharf and rail depots proposals.

7.3 The 2020 Review of the HMWP found that no safeguarded sites had been developed for non-mineral uses against MPA advice in relation to Policy 16 (Safeguarding – minerals infrastructure) and Policy 34 (Safeguarding potential minerals and waste wharf and rail depot infrastructure). However, there was one occurrence in the first five years of the Plan where a planning permission was granted in a safeguarded area contrary to MPA advice (application 14/00865/OUT, Land at Chapel Hill, Kingsclere, Basingstoke was permitted affecting Basingstoke Sidings).

7.4 With the exception of Basingstoke Sidings, the safeguarding policies in the adopted HWMP have been successful in protecting wharves and rail depots as no infrastructure has been lost as a result of development.

7.5 Recognition of the strength of the safeguarding policies was given by operators when discussing sites. The policies had been used to highlight the significance of sites when plans or development proposals encroached.

Survey findings

7.6 Operators were asked their views about the current Safeguarding Policies in the adopted HMWP and how effective the policies had been in practice.

7.7 The consensus was that operators had been able to continue business based on the safeguarding polices in the plan. The safeguarding policies had been helpful when there had been a conflicting issue. For example, when

encroaching development or plans for development nearby had the potential to cause difficulties for the current operations.

7.8 The difficulty had been where there is viability of sites to take into consideration. This had been the case with Fareham Wharf, where the site had been marketed as an aggregate wharf. But the market could not identify any other marine operators. In this instance, the safeguarding status and policy had been useful, but was necessary to review the status to ensure the site and operations were still viable.

7.9 The need to ensure wharf land was not sterilised was recognised. However, in some instances where sites were no longer viable, from a business perspective there was a strong need to ensure sites did not turn into liabilities with degrading wharf structures.

7.10 There was some serious concern with the safeguarding policy wording:

'Merits of development outweigh the needs for housing'

7.11 It was felt that currently there is such a demand for housing that this surpasses all other issues and would all too frequently be used by Local Planning Authorities to grant permission in favour of housing developments over aggregate development.

Buffers

7.12 Queries were raised over whether the use of a uniform buffer of 100 metres as set out in the Safeguarding SPD was appropriate in all cases. There was a suggestion that ideally this should be a flexible area that is more site specific.

7.13 This was considered particularly relevant to wharves, where the current buffer approach encompasses the wider area, the site sits in. But locations across a water body could be a greater distance and therefore not identified as part of the neighbour notification exercise. Concerns would still be raised about noise all the same but not picked up on in safeguarding policy. However, the safeguarding SPD already recognises this point, so addresses this concern. In other cases, the urban nature of the areas could mean that the 100-metre buffer is too wide, with existing buildings masking any noise effects in the wider area.

Agent of Change Principle

7.14 The 'Agent of change principle' was introduced as part of the NPPF. The Agent of Change *principle places the responsibility for mitigating impacts from existing noise-generating activities or uses on the proposed new noise-sensitive*

development[33]. In other words, the person or business responsible for the change must also be responsible for managing the impact of the change.

7.15 It is a topical issue and of particular importance in the context of the national imperative to build more houses and locate them sustainably. This has implications for wharf and rail depot operations, in terms of locating houses near to transport links or desirable waterfront locations.

7.16 National Planning Policy (2021) makes it clear that applicants for proposals must ensure suitable mitigation is provided, where relevant, to avoid significant adverse impacts from noise. In particular:

- Planning decisions should ensure that new development is appropriate for its location (para. 185 NPPF).
- Decision makers should ensure that, before permission is granted, any noise issues are mitigated and reduced to a minimum – so as to avoid noise giving rise to significant adverse impacts on health and quality of life. (para. 185 (a) NPPF).
- Particularly in the context of existing businesses and community facilities – those facilities must not have unreasonable restrictions placed on them as a result of development which arrives after them (para. 187 NPPF).
- If there is a prospect of a significant adverse effect on proposed new dwellings from an existing facility the applicant for the new dwellings is 'required' to provide suitable mitigation (para. 187 NPPF). ['the agent of change' principle].

7.17 Discussions with operators identified that despite the provisions laid out in national planning policy, there were significant concerns that the principle does not hold up in the planning process. The drive for housing was considered to outrank any other consideration.

7.18 The view was that the safeguarding policies (Policy 16 and 34) need to be stronger in order to protect existing sites and operations.

Highways

7.19 Routing of vehicles was a big concern for safeguarding, again if industrial areas were redeveloped as residential this would have implications for hours of working or distance travelled by businesses.

[33] NPPF (Para. 187) - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf

Development and Regeneration

7.20 It is important to promote development and regeneration of urban areas in accordance with the wider aims of the NPPF. However, development and regeneration of prime brownfield sites in and around urban areas has posed a significant safeguarding concern for operators.

7.21 Wharf operators cited development proposals over the years which caused them serious concerns in terms of encroachment and what that would mean for future operations. These concerns were raised alongside the safeguarding policies of the plan and successfully challenged. The Mineral Products Association has also extended support to operators to challenge such plans.

8. Conclusion

8.1 The number of active wharves in Hampshire has decreased significantly since the Plan was adopted in 2013, through the loss of six wharves. Whilst the number of wharves has decreased, there is a pattern of consolidating operations at a smaller number of wharves in the area. There has been shown to be potential for increased capacity at some sites through site improvements.

8.2 Recent capacity monitoring data shows that wharves are operating over 80% capacity with little headroom to respond to changes in market demand.

8.3 There is potential for capacity to increase should permission at the Marchwood Military Port be granted. Similarly, there is recognition of the reserve site located west of Hythe that offers significant potential.

8.4 Rail depot capacity has been maintained since the Plan was adopted. Review of sales throughput suggests that the existing rail depots have scope to increase volumes should the market demand before additional sites would be needed. However, it is recognised that all existing capacity is in the south of Hampshire.

8.5 There is the potential for rail depot capacity to increase to 2040 with the additional construction/rail depot sites identified by Network Rail at Andover and Totton, coupled with the proposals at Marchwood Military Port (Solent Gateway) and Holybourne.

8.6 In addition, the drive towards a modal shift of road to rail by the ongoing joint work between Network Rail and National Highways has the potential to increase capacity further in Hampshire. The identification of infrastructure needed in the study expected during 2022 will be critical.

8.7 Safeguarding policies will be vital to ensure there is no further overall loss of capacity of wharves or rail depots.

8.8 The report outlines concern from operators of the potential for residential led regeneration to encroach on safeguarded facilities. It is important to plan positively for the need for new homes, economic development and regeneration in sustainable locations in urban areas; as well as to ensure a supply of aggregates (not least to facilitate this development). Therefore, a careful balance needs to be struck, and it is considered that the current wording of the safeguarding policies in the adopted HMWP achieve this.

Recommendation

8.9 It is recommended that all remaining wharves and rail depots are safeguarded through the policies in the plan in order to maintain the existing capacity.

8.10 Future proposals for new wharf and rail depot facilities should be encouraged.

8.11 The capacity of wharves and rail depots should continue to be monitored to ensure that sufficient capacity is provided to enable the supply of aggregates outlined in the plan in order to meet market demand.

Glossary

Climate change
A change in global or regional climate patterns, in particular a change apparent from the mid to late 20th century onwards and attributed largely to the increased levels of atmospheric carbon dioxide produced by the use of fossil fuels.

Heavy Goods Vehicles (HGV)
A vehicle that is over 3,500kg unladen weight and used for carrying goods.

Minerals Planning Authority (MPA)
The local planning authorities (County and Unitary Councils) responsible for minerals planning.

Minerals Products Association (MPA): The Mineral Products Association is the United Kingdom trade association for the aggregates, asphalt, cement, concrete, dimension stone, lime, mortar, and silica sand industries.

Mitigation
The reduction of something harmful or the reduction of its harmful effects.

National Planning Policy Framework (NPPF)
The National Planning Policy Framework sets out the Government's planning policies for England and how these should be applied. It provides a framework within which locally-prepared plans for housing and other development can be produced.

National Planning Policy for Waste (NPPW)
This document sets out the government's detailed waste planning policies. It should be read in conjunction with the National Planning Policy Framework.

Planning Practice Guidance (PPG)
A web-based resource which brings together planning guidance on various topics into one place. It was launched in March 2014 and coincided with the cancelling of the majority of Government Circulars which had previously given guidance on many aspects of planning.

Appendix 1: Hampshire Minerals & Waste Plan (2013) – relevant policies

Policy 16: Safeguarding - minerals infrastructure

Infrastructure that supports the supply of minerals in Hampshire is safeguarded against development that would unnecessarily sterilise the infrastructure or prejudice or jeopardise its use by creating incompatible land uses nearby.

Minerals sites with temporary permissions for minerals supply activities are safeguarded for the life of the permission.

The Hampshire Authorities will object to incompatible development unless it can be demonstrated that:

a. the merits of the development clearly outweigh the need for safeguarding; or

b. the infrastructure is no longer needed; or

c. the capacity of the infrastructure can be relocated or provided elsewhere. In such instances, alternative capacity should:

   i. meet the provisions of the Plan, that this alternative capacity is deliverable; and

   ii. be appropriately and sustainable located; and

   iii. conform to the relevant environmental and community protection policies in this Plan; or

d. the proposed development is part of a wider programme of reinvestment in the delivery of enhanced capacity for minerals supply.

The infrastructure safeguarded by this policy is illustrated on the Policies Map and identified in 'Appendix B – List of safeguarded minerals and waste sites'.

Policy 17: Aggregate supply – capacity and source

An adequate and steady supply of aggregates until 2030 will be provided for Hampshire and surrounding areas from local sand and gravel sites at a rate of 1.56mtpa, of which 0.28mtpa will be soft sand.

The supply will also be augmented by safeguarding and developing infrastructure capacity so that alternative sources of aggregate could be provided at the following rates:

- 1.0mtpa of recycled and secondary aggregates; and

- 2.0mtpa of marine-won aggregates; and
- 1.0mtpa of limestone delivered by rail.

Policy 19: Aggregate wharves and rail depots

The capacity at existing aggregate wharves and rail depots will where possible and appropriate be maximised and investment in infrastructure and/or the extension of suitable wharf and rail depot sites will be supported to ensure that there is sufficient capacity for the importation of marine-won sand and gravel and other aggregates.

1. Existing wharf and rail depot aggregate capacity is located at the following sites:
    i. Supermarine Wharf, Southampton (Aggregates wharf)
    ii. Leamouth Wharf, Southampton (Aggregates wharf)
    iii. Dibles Wharf, Southampton (Aggregates wharf)
    iv. Kendalls Wharf, Portsmouth (Aggregates wharf)
    v. Fareham Wharf, Fareham (Aggregates wharf)
    vi. Marchwood Wharf, Marchwood (Aggregates wharf)
    vii. Bedhampton Wharf, Havant (Aggregates wharf)
    viii. Burnley Wharf, Southampton (Aggregates wharf)
    ix. Eastleigh Rail Depots, Eastleigh (Aggregates rail depot)
    x. Botley Rail Depot, Botley (Aggregates rail depot)
    xi. Fareham Rail Depot, Fareham (Aggregates rail depot)

2. Further aggregate rail depots are proposed provided the proposals address the development considerations outlined in 'Appendix A – Site allocations' at:
    i. Basingstoke Sidings, Basingstoke (Rail depot) (Inset Map 2)
    ii. Micheldever Sidings, Micheldever (Rail depot) (Inset Map 4)

    The rail depot proposals are illustrated on the 'Policies Map'.

3. New wharf and rail depot proposals will be supported if the proposal represents sustainable development. New developments will be expected to:
    a. have a connection to the road network; and
    b. have a connection to the rail network or access to water of sufficient depth to accommodate the vessels likely to be used in the trades to be served; and
    c. demonstrate, in line with the other policies in this Plan, that they do not pose unacceptable harm to the environment and local communities.

Policy 34: Safeguarding potential minerals and waste wharf and rail depot infrastructure

The following areas are safeguarded, so that their appropriateness for use as a minerals or waste wharf or rail depot can be considered, if they become available or are released from their current uses:

i. land located to the north west of Hythe identified in the Port of Southampton Master Plan; and
ii. land identified in the Southampton Core Strategy as operational port land; and
iii. Marchwood Military Port (also known as Marchwood Sea Mounting Centre); and
iv. Land at HM Naval Base and commercial port as identified in the Portsmouth Core Strategy for port and employment uses; and
v. Existing and former railway siding and other land that could be rail linked.

The locations identified for safeguarding are shown on the Policies Map.

Appendix 2: Wharves and rail depots operator survey

Site name:
Operator:
Date completed:

About the site
Please could you provide a description of the site including a summary of any infrastructure (eg. Size of vessels, jetty, excavators, wagons, available rail pathways etc):

Please could you provide a summary of the Operations (overview of movements/imports/exports)?

Do the movements cover specific markets/areas/uses?

Are there any plans for new Proposals/changes at the site? (Expansions/Upgrades/Change of Use)

Are there any site Constraints/Planning issues/Development Pressures you have identified?

Capacity
Please could you provide an estimate of the capacity throughput of the wharf/rail depot? (Tonnes) (Please note any relevant constraints, such as limits on vehicle movements, tides, hours of operation, demand which may influence this figure)

If there were no constraints, what is the maximum throughput?

Brexit
Have there been any noticeable effects of Brexit on the operations? Please provide a short summary.

Climate change?
As a result of the increasing priority placed on climate change, have there been any changes implemented at the site to reduce the impact on climate change or decrease carbon emissions?

Have there been any changes in transport terms? For example, as a result of other changes on network? (Loading/unloading, AQMA restrictions)

Safeguarding
The site is safeguarded under the mineral and waste infrastructure policies of the Hampshire Minerals and Waste Plan. How would you rate the adequacy of existing safeguarding status & policies? (HMWP 2013)
(in terms of development pressures, encroachment, neighbours etc)

Are there any improvements needed to the policy or status?

Have you encountered any issues with the safeguarding status of the site?

How well do you feel the working relationship with the Minerals Planning Authority is going (relevant area)? Could we do more to support you/improve working relationship?

Any other issues to raise? (Policy changes etc)

A summary of this document can be made available in large print, in Braille or audio cassette. Copies in other languages may also be obtained. Please contact Hampshire County Council by email HMWP.consult@hants.gov.uk or by calling 01962 846746