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UK Port Infrastructure Project Pipeline

Analysis Report

Prepared by Moffatt & Nichol, for the British Ports Association, March 2018

Following release of the “*Analysis of the National Infrastructure and Construction Pipeline (6 December 2017)*” by the Infrastructure and Projects Authority for the Cabinet Office and HM Treasury, an assessment has been undertaken by Moffatt & Nichol for the British Ports Association (BPA). The objective is to summarise the forecasted development and construction pipeline for port infrastructure projects in the UK.

All information identified and described within this document has been based on publically available information from articles published within the last 12months. The research does not validate the viability of each proposed scheme and does not represent confirmation that the projects are in development.

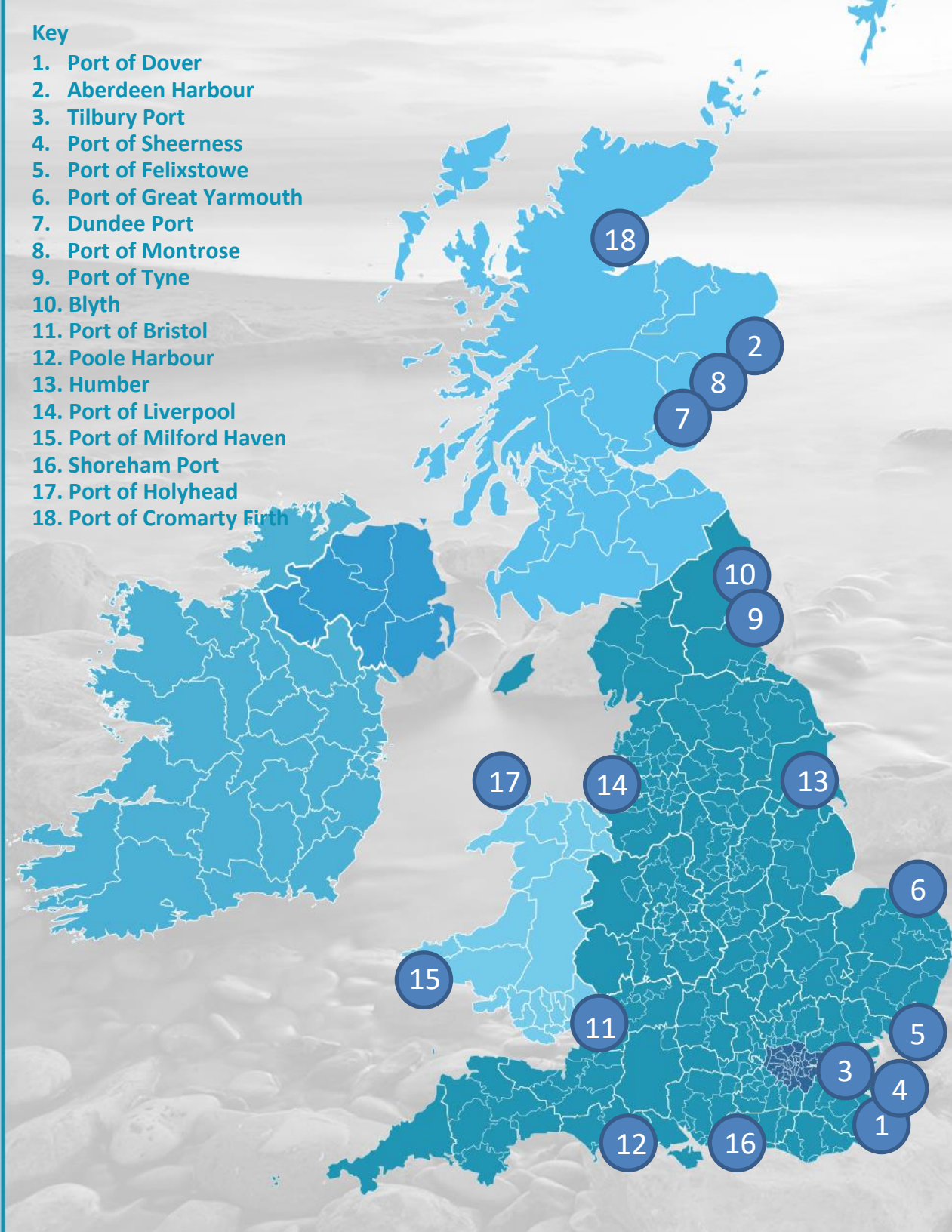
Moffatt & Nichol is a global infrastructure advisory firm, specialising in projects where land meets water. With two offices in the UK, Moffatt & Nichol were well placed to support BPA in providing a snapshot of the construction pipeline.

Moffatt & Nichol’s UK teams include specialists in Port and Terminal Planning, Coastal Engineering, Civil Engineering and Maritime Market and Cargo Forecasting.

This Report is also part of the BPA’s wider ‘Port Futures’ programme looking at how the UK ports industry will develop and change in the immediate and longer-term

Key

1. Port of Dover
2. Aberdeen Harbour
3. Tilbury Port
4. Port of Sheerness
5. Port of Felixstowe
6. Port of Great Yarmouth
7. Dundee Port
8. Port of Montrose
9. Port of Tyne
10. Blyth
11. Port of Bristol
12. Poole Harbour
13. Humber
14. Port of Liverpool
15. Port of Milford Haven
16. Shoreham Port
17. Port of Holyhead
18. Port of Cromarty Firth



UK Port & Terminal Investment

Total Port Project Investment *estimated* approximately £1.7bn, based on below

Information sources: publically available internet sources

Ref:	Region	Port	Terminal	Cargo(s) & Capabilities	Description	£	Notes
1.	South East England	Port of Dover	Western Docks	<ul style="list-style-type: none"> - Waterfront Development (Retail, Food/Bev, Hospitality) - New Cargo Terminal - Logistics facilities - Increased Ferry Capacity - Marina 	Western Dock Revival (DWDR) & Capital Building Programme	£200m	<p>Allianz Global Investors: £55m Placement Bonds</p> <p>RBS & Lloyds Bank: £35m credit facility</p> <p>EIB: £75m loan</p> <p>First phase due for completion in late 2018</p>
2.	North East Scotland	Aberdeen Harbour	Aberdeen South Harbour	<ul style="list-style-type: none"> - 1.4km Quay - 10.5m water depth (LAT) - Additional 125,000m² of yard storage area - Loading capacity of 6k tonnes - Flexible quays for operational requirements 	<p>New breakwaters (accropodes), quays & infrastructure in Nigg Bay</p> <p>Creation of new 300m turning basin</p>	£350m	<p>Currently called Aberdeen Harbour Expansion Project. Principal Contractor: Dragados UK (ACS Group)</p> <p>Completion expected in 2020</p>

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3.	South East England	Tilbury Port	Tilbury 2	<ul style="list-style-type: none"> - x2 throughput volume (32m tonnes p/a) - Triple direct employment (12,000 jobs) over 10-15yrs - Aggregate & construction material cargo focus - Ro-Ro cargo – cars and trailers - UK largest warehouse for Ferry cargo (perishables) 	152acre site Next to existing Port of Tilbury site Includes new river front berths (Thames Ferry berth - £150m) Leverage opportunities with Amazon distribution centre, which opened in autumn 2017	Part of £1bn investment programme, estimate <£300m	Pending development consent order (DCO) Operated by and to be funded by Forth Ports (owned by Private Equity managed by Arcus Infrastructure Partners) Thames Ferry Berth expansion part of new long-term partnership with P&O Ferries. Operational by Q2 2020
4.	South East England	Port of Sheerness	Wellmarsh	<ul style="list-style-type: none"> - Automotive, steel and forest products storage 	Logistics park & distribution centre	£50m	Peel Ports' investment
5a.	Eastern England	Port of Felixstowe	Port of Felixstowe Rail Improvements	<ul style="list-style-type: none"> - Increased rail capacity and hinterland throughput 	Allowing >47 freight trains p/day between Ipswich & Felixstowe port (currently 33p/day)	£60.4m	Joint funded by Hutchison Ports & Network Rail
5b.	Eastern England	Port of Felixstowe	Port of Felixstowe	<ul style="list-style-type: none"> - Containers 	+13ha new container yard behind berth 9 3.2ha reclamation +18,500TEU stacking capacity 10*6w Stacking	Undisclosed Est £70m	VolkerFizpatrick Ltd appointed to undertake design & construction Scheduled for completion circa Q1 2019 Part of Hutchison's plan to increase container-handling capacity at Felixstowe to 6m TEU a year by 2020

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5c.	Eastern England	Port of Felixstowe	Port of Felixstowe Logistics centre	- Logistics park and distribution	68 acre site 1.4 million m ² for warehousing units Range of sizes depending on lessee	Estimated £40m	Permission for development granted in 2014 No construction work started yet
6.	Eastern England	Port of Great Yarmouth	Great Yarmouth Outer Harbour	- Offshore renewable energy	350m quay 100,000m ² of land area	<£30m	Investment sources to be confirmed
7.	Dundee, Scotland	Dundee Port	Dundee Port	- Decommissioning hub for North Sea oil & gas - Offshore wind support - Heavy Lift	200m quay extension & heavy lift capability Additional 60 acres of storage area	£10m	Investment by Forth Ports Construction undertaken by Southbay Civil Engineering Completion imminent Construction led by the Spencer Group
8.	East Scotland	Port of Montrose	Montrose Port Authority	- Heavy lift - Decommissioning hub/base	Two quayside berths including deepening berths 7 & 8	£5.2m	Tender to be issued August 2018 with work starting in October 2018
9.	North East England	Port of Tyne	Port of Tyne	- 125m Riverside quay - Handling & storage facilities for biomass	Expansion of biomass handling facilities	£338m** **Unclear, how much is left to be invested in 2018. Most of work is already complete	£300m invested by Lynmouth Power Ltd in converting plant from coal to biomass £38m invested by Port of Tyne

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10.	North East England	Port of Blyth	Bates & Wimbourne Quay terminals Battleship Wharf Terminal	<ul style="list-style-type: none"> - Dry bulk handling offshore - decommissioning warehousing engineering 	Port expansion including infrastructure, superstructure (warehousing) and equipment (cranes)	£12m	Banking facility for £12m with Lloyds Bank Additional 500 jobs over 5yrs Battleship Wharf Terminal decommissioning offering to follow
11.	South West England	Port of Bristol	Bristol Deep Sea Container Terminal (DSCT)	<ul style="list-style-type: none"> - Containers - Dredge depth 18m - 400m berths 	Capability for service ultra large container ships (ULCS)	Est £400m	Proposed as a Brownfield development within Avonmouth Docks
12.	South West England	Poole	Poole Harbour	<ul style="list-style-type: none"> - Large Cruise - Cargo ships 	200m new South Quay	£10m	Construction almost complete. Due to open Q1, 2018
13a.	North East England	Humber	Immingham & Hull Container Terminal	<ul style="list-style-type: none"> - Containers 	Double container capacity New STS cranes for Hull New equipment and IT systems for Immingham	£30m Hull £20m Immingham	ABP investment which totals at least £1b across the group's profile
13b.	North East England	Humber	Port of Immingham & Hull Container Terminal	<ul style="list-style-type: none"> - Logistics & Port User Development 	50 acres for office accommodation and haulage related uses in the port area	Undisclosed Part of £50m investment as above	ABP investment Part of Humber Enterprise Zone to provide business rates relief and discount for qualifying businesses. Construction commencing 2018

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14.	North West England	Port of Liverpool	Liverpool 2, Phase 2	<ul style="list-style-type: none"> - Containers - Handling equipment, including additional STS cranes and RTGs - Container Yard - Reclamation 	2 nd phase of Liverpool 2 to add more technology and equipment to service larger vessels.	Est £100m	Peel Ports Contractor appointment Q1-Q2, 2018, Completion by end-2019
15.	Wales	Port of Milford Haven	Milford Waterfront Pembroke Dock Marine Pisces	<ul style="list-style-type: none"> - Waterfront residential, work and leisure development - Energy (Oil, Gas & Renewables) - Smart Grid Energy Networks (reducing carbon footprint) for fish processing industry 	<p>35,000m² new development space</p> <p>Support infrastructure for renewables sector offshore</p> <p>Modelling and optimisation of existing energy networks</p>	<p>Access to €100m (European) funding</p> <p>Undefined actual investment value</p>	Clarity on status of each project is undefined.
16.	South Coast England	Shoreham Port	Lady Bee Marina	<ul style="list-style-type: none"> - Marina - Aggregate - Warehousing - Commercial Property - General Cargo/Bulk 	Lady Bee Marina is currently proposing a redevelopment to create new commercial facilities for 45 small businesses & a business hub	£4m	Planning permission pending. Due for construction September 2018. Completion circa Q3 2019.
17.	Wales	Port of Holyhead	Terminal 3	<ul style="list-style-type: none"> - Ro-Ro - Passenger Ferry 	Additional freight space and refurbishment of Terminal 3	£4m	Construction commenced Investment by Stena Line ports

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18.	North Scotland	Port of Cromarty Firth	Phase 4	<ul style="list-style-type: none"> - Cruise - Offshore Renewables - Oil and Gas 	215m of additional quay and 11 acres of laydown	£23m	<p>Currently open to pre-application consultation.</p> <p>Submission of marine licence expected May 2018</p> <p>Target construction commencement November 2018</p>



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