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**CYSYLLTEDD RHWYNWLADOL TRWY PORTHLADDAU A FEYSYDD AWYR CYMRU  
INTERNATIONAL CONNECTIVITY THROUGH WELSH PORTS AND AIRPORTS**

**BRIEFING PAPER**

Professor Stuart Cole,  
Wales Transport Research Centre, University of Glamorgan Business School

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**POLICY RESPONSIBILITY**

The responsibility for seaports in Wales lies with the Department for Transport (DfT) in Westminster. Whilst there may be an argument for the security aspects to be so positioned, the rationale for economic aspects deriving from port operation and development being so located is weak.

This was illustrated at a seminar to discuss the DfT's *Ports Policy Consultation Paper* (2006). An overall Great Britain view tended to concentrate on the large container ports e.g. Southampton, while Wales has no ports with that capacity level.

The Welsh Government's responsibilities for highway links and for employment and economic development and regeneration were therefore difficult to link into the use of ports as an employment generator. Taking a Great Britain overview on capacity did not take

full recognition that while some large English ports were at capacity, many of Wales' ports could take a considerably higher throughput.

There did appear to be a lack of realisation that the consultation document was not a 'national' policy as it claimed to be. It was however a perfectly good 'England' policy.

The conclusion to be drawn in relation to ports is that economic policy and intervention should be the responsibility of the Welsh Government with the proviso that appropriate levels of funding be attached to the Welsh Block Grant in respect of ports development.

Unlike mainland Europe most ports in Wales are in the private sector. This can provide barriers to state aid. The Milford Haven Port Authority while a public body operates commercially at arm's length as a trust port.

## **POTENTIAL SOURCES OF INCREASED TRADE**

### **Who is the customer?**

In the passenger transport business, it is possible to identify two types of customer, who may be the same person. There is the 'customer' who pays, and the 'customer' who travels.

The customer of a freight transport service is more difficult to identify. They pay for the transport service, but it is goods that travel. The costs of transport are passed on.

The freight customer may be:

- i) a product manufacturer,
- ii) another business user of the goods, such as a retailer or assembler of components
- iii) the end customer for the goods being transported or
- iv) A logistics and transport provider working on behalf of one of the other three categories.

Each of these may place a different value on the key variables of time, cost and quality of the transport but the end customer will normally have no idea what percentage of the total price is for transport costs. They may also not know what modes of transport are used.

### **Decisions on mode of transport.**

It is essential to realise that many 'decisions' on modal choice are not a decision at all. Most are a passive decision to 'do what happened last time'. This may be because of existing contracts with partners, convenience or inertia

The customer of the transport service will generally have an idea of what transport costs are affordable, based on an historical view of 'what it cost last time'. The EU study on Freight Integrators (September 2003) identified that transport decisions are taken firstly on price, and secondly on timescale. The modal preference is not usually part of the decision.

Only when there is a new traffic flow will a modal choice be made. Even then, in many instances the 'choice' is based on extending previous transport patterns.

If there is a decision to change mode of transport, that decision may not be immediately implemented. The EU study also found that for an existing traffic flow it can take 6 to 12 months to make a change in the mode of transport used. Hence the considered view that a new transport service needs at least three years of operation to reach a stable level of traffic.

In 2006, a report, *Wales and the Atlantic Arc: Developing Ports (1)* found that the modal choice by manufacturers and freight forwarders was based firstly on price and overall journey time second. Quality of service and reliability were also important and could give ports a competitive advantage over road.

However there was also inertia by transport operators and international logistics companies to change from their existing mode of transport. There was a lack of knowledge of Welsh ports in other EU countries and this has to be overcome if new services are to be developed in partnership with other ports.

It would be a valuable output of the report if the actions by ports themselves and also by the appropriate government (WG or UK) in promoting Welsh ports could be identified and suggested improvements in the present position recommended.

The Welsh ports studied had sufficient spare capacity and good facilities but these alone were not sufficient. Capacity expansion and investment were taking place elsewhere and seemed less constrained by EU rules on for example the environment and state funding

Marketing and new business development does not appear to have a planned strategy and is often based on existing products, customers and shipping operators. A move to a new route can take two years and may be seen as having a greater business risk.

A real modal shift from road to ship to divert traffic from the Channel Tunnel will involve winning road freight traffic which is not destined for Welsh ports or their immediate hinterlands. Thus there follows a need to examine and invest in existing road and rail links to / from Welsh ports to English urban destinations as well as the short sea shipping customers.

Ports can however enable added value operations to take place such as packaging and warehouse facilities with the associated employment benefits.

The use of larger container ships reinforces industry concentration for ports with smaller ports looking at options for feeder operations. Brest provides a feeder service from northern France to Rotterdam for example. (2)

A difficulty arises in identifying potential sources of new operators. The market is large and while we might ask for evidence from well-known logistics operators (e.g. DHL, Maersk, Christian Salvesen, Norbert Dentressangle and Exel Logistics) car distributors such as Gefco or from retailers (e.g. Tesco) they are unlikely to provide us with the answers to our questions unless by chance they are in the market already.

However there is an advantage to be gained in asking these companies for evidence. There has been a concentration and growth of international logistics companies.

References

- (1) Wales and the Atlantic Arc: Developing Ports, Wales Transport Research Centre, University of Glamorgan for the Welsh Assembly Government  
<http://transport.reserach.glam.ac.uk/projects/Atlantic> Arc
- (2) Intermodality in Freight Transport, Wales Transport Research Centre , University of Glamorgan and South West Wales Economic Forum for Reseau Transnational Atlantique / Atlantic Transnational Network for the European Union Project (ERDF)  
[www.rta-atn.org](http://www.rta-atn.org)

**Marketing ports to the freight business.**

The nature of the freight business makes marketing and developing new business difficult. Traffic for ports is often based on existing customers, existing products and existing destinations. Milford Haven for example, has developed business for a new Liquefied Natural Gas pipeline. This is very closely allied to the existing range of petroleum related products through the port. Cardiff has developed its steel business by exporting scrap steel and importing finished steel products for a current company customer (Level 1 in Table 1 below).

However, for new traffic, or for a modal change, ports and short sea shippers need to look beyond that.

**Table 1: Types of potential new short sea traffic for a port**

<b>Level 1 (easiest to attract)</b>
Existing customers
Existing traffic types/ products

Existing destinations
<b>Level 2</b>
New customers from hinterland
New destinations
New traffic types
<b>Level 3 (hardest to attract)</b>
Through traffic not originating / terminating in hinterland
Other traffic not originating / terminating in hinterland

For example (at Level 3), fruit traffic from Southern Portugal to the English Midlands currently travels by truck through Spain, over the Pyrenees, through France and the Channel Tunnel. It crosses two countries which are not part of its market, and two major natural obstacles, a mountain range and a 20 mile sea strait. This traffic could be diverted to a short sea route between say Lisbon and Swansea. This change is difficult for the ports of Lisbon and Swansea to develop in isolation, as the traffic does not originate or terminate in their immediate hinterland, and there is currently no service between the two ports.

This 'Level 3' potential traffic (as in Table 1 above) is the most difficult to identify, and then to win. It goes against the habitual approach to deciding which port to use. There are unlikely to be existing relationships to build upon. Market intelligence about traffic flows which could potentially switch may be difficult to obtain.

### **Potential Products for business development**

What products might be available for switching to a short sea route into the UK through Wales? Some information is given in the products imported to the UK and exported from the UK by road.

Foodstuffs or other perishable goods may not be suitable for modal shift to sea transport as the nature of the product often makes a short journey time and flexible access essential. However manufactured goods or frozen foods for example may yield some possible traffic for transfer. Potential traffic flows for the Welsh ports are coal, aggregates and other bulks,

containers, forest products and steel. These all exist today but there is scope for much greater traffic. A map showing the Atlantic Arc ports is in Appendix 1

### **Potential trade routes based on Wales' main sea trading routes**

- Ireland
- Northern Ireland
- Mediterranean countries (mostly in the EU)
- Baltic states e.g. Latvia, Russia
- Scandinavia e.g. Sweden, Finland
- Oil producing countries to Chevron
- Gas producing countries to LNG terminal
- South America
- Far East
- Coal producing countries
- Iron ore producing countries
- Western France
- Iberian peninsula (Spain and Portugal)
- South western France for Toulouse

### **Freight Industry Trends affecting Business Development**

This section briefly examines some of the global business trends which are likely to have an effect on developing ports and short sea traffic. These trends are against the background of the major growth in freight traffic, and road freight in particular, as seen in the previous section.

#### **Industry concentration and the growth of international logistics companies**

As trade has developed and volumes increased, there has also been a trend towards greater concentration with large global companies dominating international freight transport, and some of the larger ports continuing to grow while small companies and facilities have closed or seen a reduction in business.

Having said all this one of Wales' most successful road haulage and logistics companies is Owens Road Services, Llanelli. With a fleet of 450 vehicles, 50 of which are on mainland Europe at any one time, it is a medium sized Welsh company who have developed their business over the last twenty years.

#### **Economies of scale – size matters**

There has also been a trend to carrying bigger volumes in larger ships. Car carrying ships can take over 5,000 cars. These very large container vessels will have less choice as to where

they can dock due to draft, length and width constraints. This will both reduce the number of direct ports of call with a concentration into certain hubs, and also possibly encourage transshipment via feeder ship may be the most efficient form of onward distribution.

### **Containerisation**

There is an increasing trend towards containerisation. This is a result of the globalisation of trade. Products from the Far East can be cheaply produced and transported in containers across the world to reach the key markets in the US and Europe. These products retail far more cheaply than products produced directly in those markets where labour and operating costs are generally much higher.

Containers which have arrived on deep sea routes, will then transfer to other modes, whether at Rotterdam, or in the UK's main deep sea ports of Felixstowe, Southampton, Liverpool and Tilbury in the London area.

Inland distribution of containers remains an issue in the UK. Ports and shipping lines are generally keen to increase the rail share of inland distribution, but there are capacity issues with the UK rail network., Ports and shipping lines apparently do not see a significant role for distribution by coastal services as the distances are not sufficient to justify the extra handling costs and a high frequency service would have to be provided to compete with road freight. However increasing road haulage costs and reduced reliability may push deep sea shipping lines to make increased use of feeder vessels providing possible feeder service opportunities for smaller ports such as Cardiff and Swansea.

There are currently relatively small numbers of units moved by coastal container or RoRo services. There are however initiatives to move empty containers by coastal service, back to the main ports such as Rotterdam, using smaller ports such as Brest (Brittany) as a hub for this operation. However it is clear that the facilities at the larger ports have to be geared to transferring traffic to short sea routes.

The oil companies and those supplying LNG are the biggest operators, in volume terms, into Wales (Map in Appendix 1). However their market is currently confined to Milford Haven, which has the deep water facility required. While other deep water berths such as Port Talbot might be available if steel production, and therefore the import of iron ore, falls dramatically the possibility might exist for LNG/oil imports through Port Talbot if these could be diverted from other ports or if there was a demand for additional import facilities to those at Milford Haven. Transfers from Milford would provide no benefit to the Welsh economy but growth in this market would be a positive move.

Wales has no hub or feeder ports to much larger ports at present. Because of our position on the periphery of Great Britain and the EU and the relatively short distances that for example containers have to travel to Southampton the major centre for that trade , companies are unlikely to deliver for onward shipment to Southampton or even less Bristol.

Brest which acts as a feeder port for Maersk to Rotterdam is successful because of the road distances involved and the level of industrial output which is considerably more than in south west Wales.

## **MODAL OPPORTUNITIES AND CONSTRAINTS IN WELSH PORTS**

### **Option 1: Truck**

Within Europe, road transport can offer a door to door service, for a huge range of products. In some instances a truck may also use another mode of transport, such as a RoRo ferry or a Channel Tunnel shuttle train, but the goods can travel by truck from door to door with no need to transfer the load. The fact that handling is limited reduces the risk of damage to the load.

### **Option 2: Rail (probably also with a truck element)**

Within Europe, rail freight can occasionally give a door to door service, although this may be to another business user, as for example with car components travelling to a factory, rather than the retailer or ultimate end user. There is a fundamental issue with 'last mile' provision. Whereas it is possible to get a truck to most locations, many locations will be 20-50 miles from the nearest railhead for freight services. Typically a rail option will need to involve a road transport element at start and the end of the journey. For the customer, this will require dealing with a rail freight operator, as well as road haulage companies. Railfreight operators, do not also provide road haulage as well.

For this option a high level of traffic is needed, not just in volume, but also in frequency and regularity. .

### **Option 3: Sea (probably also with a truck element)**

Few customers are located at a port. In some instances, businesses have been located close to a port to benefit from the transport links. For example steel works in South Wales are close to both raw materials and transport links.

However, in the majority of cases, a sea journey will also need a road journey, (or possibly a rail and a road journey) probably at both ends of the sea transit. The transfer will add to the overall journey time. Even for a global journey from the Far East, with the European leg of the journey beginning at a port, (such a Rotterdam or Felixstowe), the onward transfer is often by road rather than by sea.

### **Option 4: Logistics and Transport Operators**

This is less a modal choice issue, more a decision based on complexity and overall price. Many businesses delegate to a logistics provider all the transport decisions and operational



management for an overall price. Some larger logistics providers such as Maersk and Exel will have their own containers, ships, rail wagons and trucks; others will have partnership arrangements with other operators. They regard themselves not as transport companies, but as 'complete supply chain managers'.

### **Conclusions on modal choice for freight**

Price is the driver of decisions in the freight business. Mode is chosen on the basis of the cheapest price.

Road is at present, generally, the cheapest option for transport within Europe. It is also usually the simplest to organise. Growth patterns for freight confirm the apparent ease of choosing road transport. Road traffic has grown faster than any other mode, and is predicted to continue to do so.

The domination of road transport poses a major issue for those who seek to persuade traffic to switch modes. Other modes do not have a simple 'one stop shop' for pricing and scheduling information. In many instances end customers will consider cost rather than the mode used.

Reliability is the second factor. However, road congestion does not yet seem to be having an impact on reliability as a truck has options to divert to another route. This is in contrast to rail or shipping for example, where a delay will affect an entire shipment.

The complexity of the decision process for 'non road' modal options has an impact on business development. A port cannot single-handedly pursue new business without a plan for onward transport whether land or sea based. A port has to work in collaboration with road and / or rail partners, shipping lines, and other ports in order to successfully develop new traffic.

### **PORT CHOICE**

Port choice seems to be either a question of habit and inertia, and also is often based on imperfect information. There is relatively little genuine competition.

The 'habit' element can be seen as ports tend to build traffic from their current customers, and range of destinations, i.e. the people that already know them. Operators are generally very reluctant to change established business patterns. In describing their ports, even the operators and port authorities typically refer to the current hinterland accessible by road and current types of traffic rather than potential growth.

Rail or logistics operators may have an interest in using ports which connect to their current network of services. Shipping operators too, turn to the ports they currently serve reinforcing historical and contractual ties. .

Within the UK, infrastructure development can be seen to be developing around the biggest ports for known increases in traffic, rather than as speculative development for smaller ports. Thus for example, rail infrastructure improvements to serve the port of Felixstowe, will serve to reinforce and further enhance its role as the UK's biggest port.

For the development of short sea shipping, particularly for new services, it is essential to have knowledge of other ports, either to recommend a port over its neighbours, or to develop links with potential collaborators and it is clear that knowledge is based on old and often imperfect information. Milford Haven for example, is frequently described as an oil port, without any realisation of the RoRo services which operate there (Pembroke) nor of its new LNG role.

## **MOTORWAYS OF THE SEA**

This concept is still being developed by the European Union. The objective of 'Motorways of the Sea' is to promote high quality, frequent door to door intermodal freight movements, with the long haul stage completed by sea.

## **LAND SIDE INFRASTRUCTURE AND QUALITY**

### **Road congestion**

Road congestion is increasingly becoming an important issue across Europe for road hauliers. Congestion affects the speed and predictability of transfer. It also generates environmental impacts as the increase in road freight is felt by other road users, and local communities. Congestion and delays increase fuel consumption — and pollution.

High quality land side links by road and rail for are essential if the hinterland of ports in Wales is to be extended to say the south east, midlands and North West of England. This includes provision for higher line speeds and for improved roads with dual carriageway links or at least single carriageway with dual sections. Wales' ports have to compete on journey time by sea and the overall driving time to the final destination. This will affect the cost attractiveness of Wales as an investment opportunity compared with other EU member states.

Wales has to compete with low labour cost member states which are often nearer to the major consumer markets. Thus the quality of our infrastructure both quayside and landside has to be more efficient for the mover of goods.

### **Quality of service and just in time logistics**

Much of the freight and logistics industry has changed in the last decade to reflect business practices with very low inventory, reliant on a 'just in time' delivery system to the customer. This keeps overall costs and working capital low, but the transport element becomes vital for major distribution organisations, whether for finished goods, such as supermarket supplies or components and materials, such as for car production. With a just in time logistics chain, the reliability and quality of service becomes paramount as a failure can lead to empty supermarket shelves, or stop a car production line.

## **TOURISM AND THE CRUISE MARKET**

A number of questions arise when considering the reasons why the Celtic Sea (please refrain from using the term Irish Sea which deflects attention from Wales) has not generated the level of business achieved by the Baltic Sea whose historical, cultural and geographical features are similar. The latter is now the third biggest cruise market after the Caribbean and the Mediterranean.

***Which Welsh ports have deep water sufficient for the 2500+ passenger ships?***

***What deep water facilities do cruise shipping companies require to entice them to Welsh ports?***

The return to the local economy however can be considerable. At a spend level of £100 - £150 per person a large cruise liner such as the Golden Princess, (109,000 tonnes with 2600 passengers) which has called at Holyhead, may generate £250,000 per one day visit through tourist spend (on excursion coaches, restaurants, souvenirs etc.) and vessel servicing.

It has been suggested that such a ship can flood an area with visitors and may detract from the visitor experience, and that ships of 1300 passengers are preferable. However the number of ships of the latter size is limited but they are able to operate into smaller tidal berths such as Cardiff and Newport.

A larger cruise liner has called at Holyhead four times in a year and some cruise companies see a potential expansion in that level given the right berthing conditions. Many of the passengers are North American looking for a taste of Welsh / Celtic ancestry history, culture and scenic beauty. Special entertainment was provided on board when the Golden Princess called at Holyhead on US Independence Day

However the development of the cruise market for Ynys Mon and north Wales is restricted by inadequate infrastructure at Holyhead. Although there is sufficient deep water for large ships to currently anchor off Holyhead the quayside length is insufficient to enable the ship to berth.

An extension to the Anglesey Aluminium jetty using a dolphin (a long concrete slab enabling the ship to 'tie up') at an estimated cost of £3m was proposed in 2009. The jetty itself is considered large enough in area to accommodate excursion coaches and freight vehicles.

This is an important part of cruise operational and financial success. It is the single most important criterion in determining the calling points on a cruise. The alternative is to ferry passengers to and from the quayside which has a cost attached to it. The most important aspect however is the inability to work on the ship, to offload and reload food, drinks, fresh water and diesel fuel.

There is a three year lead time for companies to determine new routes and calling ports. Constructing such a facility at Holyhead (and at Milford Haven which has deep water but where a new jetty would have to be built at a cost of £20m - £30m) would not guarantee its development as a calling port but would be a prerequisite for consideration. There is therefore a risk but one with considerable potential economic and employment impact particularly as the Anglesey option has such a low capital investment and might be justifiably used to test the market

***How might such a cruise terminal be funded?***

The current technical assessment of Anglesey Aluminium jetty as a cruise quayside will in the industry's view provide a perfect quayside for the larger ships to dock alongside. This would be seen as a public investment not one by Stena Line as the return to the port operator is relatively low, certainly below the 13% - 15% which a commercial port operator would expect from a capital investment project.

The major benefit would be to the wider local economy with jobs in the retail, coach operations, catering and historical / culture business sectors. Princess Cruises see the opportunity to give their largely American market a taste of Wales. Caernarfon Castle (with its royal connections) and the historic Ffestiniog Railway are popular destinations on excursions – a very profitable part of the cruise business along with alcohol sales and the casino and on board retailing

***What attractions do the current cruise passengers at Holyhead find most attractive (e.g. Castell Caernarfon, Ffestiniog Railway)***

***What attractions on shore would they find in north or south Wales in the hinterlands of the ports which could be so developed?***

Potential to replicate the Baltic Sea with Celtic Sea - Wales, NW England, Ireland (especially Dublin), Scotland – destinations would provide the ideal short trip multi visit conditions which give best profitability. Comparisons with the operations in the Baltic, Canary / Madeira / west Spain and the eastern Mediterranean fly - cruise show the economics of cruise shipping could fit into the Celtic Sea. The Princess Cruise operation already includes Dublin, Belfast and Edinburgh as part of its programme.

***Could we replicate the success of the Baltic sea as a cruise destination in the Celtic sea taking destinations in , for example, western Scotland, Holyhead, Milford Haven, the west country(in England) Dublin and Belfast?***

The cruise operations below are particularly useful because of the similarity of their operation with that which might be developed in the Celtic Sea as an internal operation.

Most cruise operators in the Baltic Sea call into five / six visited ports per seven day cruise. These may be in different orders and not all are the same. The choice in general is:

Copenhagen  
Gdansk  
Tallinn  
St Petersburg  
Helsinki  
Stockholm

These might operate back to back e.g. Copenhagen – Stockholm; Stockholm – Copenhagen alternate voyages or as a full circle. This operation over say three months would bring a total of twelve or more cruises.

The ports for the Celtic Sea equivalent could be

**Key Terminal Port** (with direct air links to the USA and Canada)

Dublin

**Calling Ports**

Belfast  
Glasgow  
Barrow in Furness (for the Lake District)  
Holyhead  
Liverpool (though preferably served via Holyhead)  
Milford Haven (future)

**Standing Off Ports** (calling ports for smaller vessels)

Cardiff  
Cornwall (standing off only)

***How was the development of a cruise terminal at Liverpool docks funded?***

Liverpool opened a £19m public funded cruise berth in 2005 (?) which took much of Holyhead traffic. Income to the port of an estimated £80,000 pa was insufficient to justify investment where Stena would look for a 15% rate of return.

## **WELSH PORTS – OPERATION AND OWNERSHIP**

### **Newport**

- Location: mouth of the River Usk; Severn Estuary / Bristol Channel; near J28 M4
- Cargo: general including timber, cars, non-ferrous metals, building Materials, steel, minerals and ores especially coal, agribulks, animal feed, sand, forest products (from Baltic ports)
- Links: road and rail
- Owners: ABP plc ( trading name of Associated British Ports Holdings PLC following privatisation)

### **Cardiff**

- Location: mouth of the River Taff south east of the Cardiff Bay development; Severn Estuary / Bristol Channel
- Cargo: containers, dry bulk (e.g. pet products storage and bagging), forest products (from Baltic ports), fresh produce (using chilled, ambient and frozen chambers), general cargo (coated pipes, mining supports, rail carriages, heavy duty Ro-Ro), steel.
- Cruise market (limited with potential)
- Links: rail and road (single carriageway to M4)
- Owners: ABP plc

### **Barry**

- Location: near Barry town; Severn Estuary / Bristol Channel
- Cargo: Dry bulks (grain, cement, flour including bagging), containers, forest products (Latvia), general cargo, Ro-Ro, liquid bulk (chemicals), steel, re-cycled metals
- Links: limited capacity road and rail
- Owners: ABP plc

### **Port Talbot**

- Location: adjacent to M4 with direct access
- Cargo: mainly Corus imports of coal and iron ore; third party coal for power stations; one of the deepest berths in UK (Tidal Harbour); processed slag (Port Talbot Docks); sand heavy lift cargoes, Ro-Ro
- Links: direct road to M4 motorway; direct rail connection
- Owners: ABP plc

## **Swansea**

- Location: seaward end of the Severn Estuary; east of Swansea city centre
- Cargo: dry bulks (cement, agribulks, including bagging), coal, plywood, steel, copper, Ro-Ro, marina development
- Cruise market (limited with potential)
- Links: high quality road to M4, direct rail connection
- Owner: ABP plc

## **Milford Haven**

- Location: in areas on each side of the Milford Haven / Aberdaugleddau. Milford Haven on the north bank and Pembroke Port and the Chevron oil refinery to the south.
- Cargo: oil, liquid natural gas (LNG); Ro-Ro major link to Ireland), general cargo (including scrap steel outbound), marina development
- Cruise: (limited with potential)
- Links: direct rail link but with low line speeds and network line single track in places. Road links have limited capacity; 28 miles from dual carriageway at St Clear's (A40).
- Owner: Milford Haven Port Authority. A port trust required by Act to operate efficiently, cover costs from revenue and benefit the local area

## **Fishguard**

- Location: West Pembrokeshire coast
- Cargo: Ro-Ro is the primary business
- Links: single carriageway road to St Clear's(A40)
- Owner: Stena Line Ports Limited

## **Holyhead**

- Location: On the Isle of Anglesey / Ynys Mon in north west Wales. En route to Liverpool and Manchester Docks; opposite Dublin across the Celtic Sea
- Cargo: primarily Ro-Ro (Stena Line / Irish Ferries) and foot passengers; deep water quayside bulk facility
- Cruise: 7/ 8 ships per annum; down from 15 p.a. three years ago
- Links: A55 Expressway direct access; direct to English motorway network; railway station at Holyhead port; on Trans-European Network (Euro route 22 to Republic of Ireland). Potential competitor to Liverpool.
- Owner: Stena Line Ports Limited

## **Mostyn**

- Location: south bank Dee Estuary, north Wales.
- Cargo: Airbus A380 wing load out transfer facility. Wings are 48 metres long, weigh 25 tonnes and are transported in a jig weighing 100 tonnes Air transport is therefore not possible. Wings are brought along the River Dee by barge (Afon Dyfrdwy) and transferred to the specialised ship for onward sea transfer to the Airbus factory at Toulouse. Ro-Ro facilities for accompanied and unaccompanied trailers. General cargo
- Links: rail - North Wales Main Line adjacent; road link to A55 Expressway / English motorway network.
- Owner: Mostyn is privately owned and operated. It is also a statutory harbour authority

## **Opportunities**

- Cruise shipping
- With improved internal links into the English motorway network there are several opportunities for short sea shipping within the European Union e.g. Atlantic Arc ports (western France; Iberia)
- Container development e.g. at Cardiff
- Ro-Ro services to southern Europe e.g. Santander In particular unaccompanied trailers
- Diversification already seen at Milford Haven where LNG has replace oil as an important product
- Joint marketing of Welsh ports with ABP plc and Stena Ports and WAG taking a lead

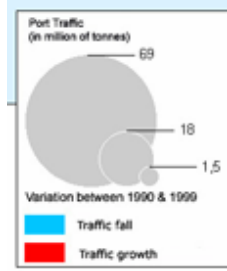
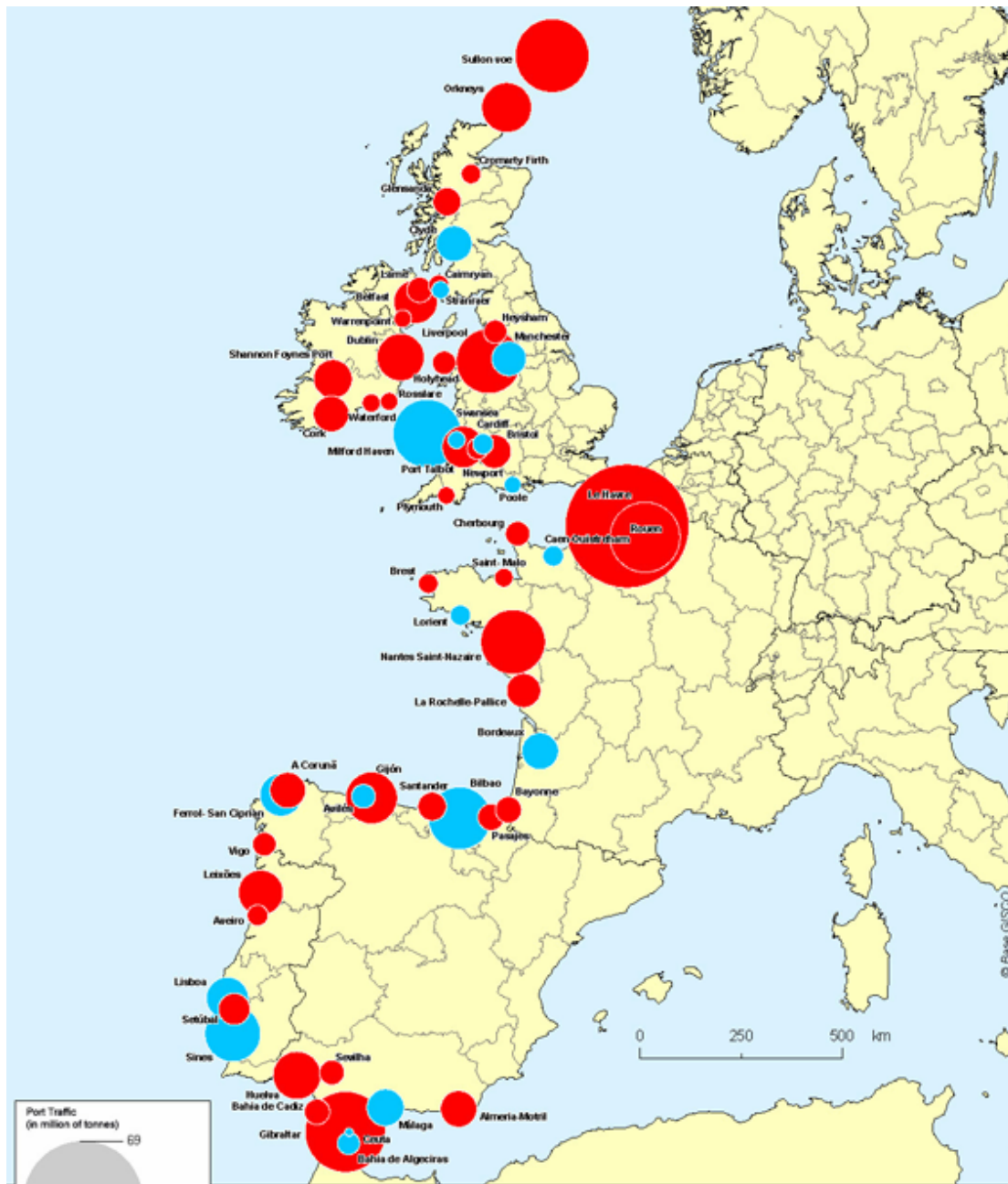
## **Professor Stuart Cole**

Emeritus Professor of Transport  
Wales Transport Research Centre  
University of Glamorgan Business School

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## **Appendix 1: Map - Atlantic Arc Ports**



Source : EUROSTAT

IAAT

