

Future Southampton

A Vision for Growth, Trade and Opportunity

Port Masterplan 2027 – 2050

ASSOCIATED BRITISH PORTS



Together with our partners, we estimate that we will be investing some £2 billion into the Port and its supporting infrastructure in the medium to long term.


ASSOCIATED
BRITISH PORTS
BARRIER
BARRIER
BARRIER
BARRIER
BARRIER

Foreword

Creating shared value for Southampton.

I wrote the foreword to our last Masterplan within months of arriving as the Port's new Director. Ten years on, I still feel the same pride at the variety and complexity of the goods I see crossing our quays every day.

In 2016, I wrote that our port was thriving but had no space to expand, and that we would invest to make every acre work harder.

We have done what we said we would. Our acquisition of Solent Gateway at Marchwood and Eling Wharf has given the Port, for the first time in a generation, real room to grow, helping local maritime businesses thrive, safeguarding local jobs and strengthening support for our Armed Forces.

In the past 10 years, we have overseen the opening of a new cruise terminal, delivered the UK's first large scale shore power facility for cruise ships to turn off their engines whilst in port, significantly increased our on-site solar capability and improved our marine capability to serve the ships that call in Southampton.

But global trade doesn't pause for breath. Advancements and changes to ship design, trading patterns, technology and consumer choices as well as the drive to decarbonise and improve environmental performance mean that this great port must continually evolve and reflect those changes.

Since we published our previous Masterplan, the world has experienced unprecedented change and it is clear to me that resilience and capability are core strengths of this port. We must ensure that those strengths continue into the future.

The Port of Southampton has been one of the nation's gateway trading ports since Roman times. Today, our role supporting freight and passengers remains as important as it has ever been.

Our geographical location close to the major shipping route into Northern Europe positions Southampton as a key strategic hub for shipping for the nation.

The entire port community and the related supply chain work hard every day to bring vital goods to people and businesses across the country with speed and efficiency and we're proud of our accomplishments.

This is our third iteration of the Port's Masterplan covering the timeframe up to 2050.

This document sets out how we see the Port evolving. We must continue to evolve and invest in our operations and our infrastructure in order to provide the country with that vital maritime connectivity in an ever changing world.

Together with our partners, we estimate that we will be investing some £2 billion into the Port and its supporting infrastructure in the medium to long term.

We are inviting comments from anyone who has an interest in the Port. We are always keen to hear views from all of our stakeholders as to how the Port can best serve the needs of the local, regional and national economy.

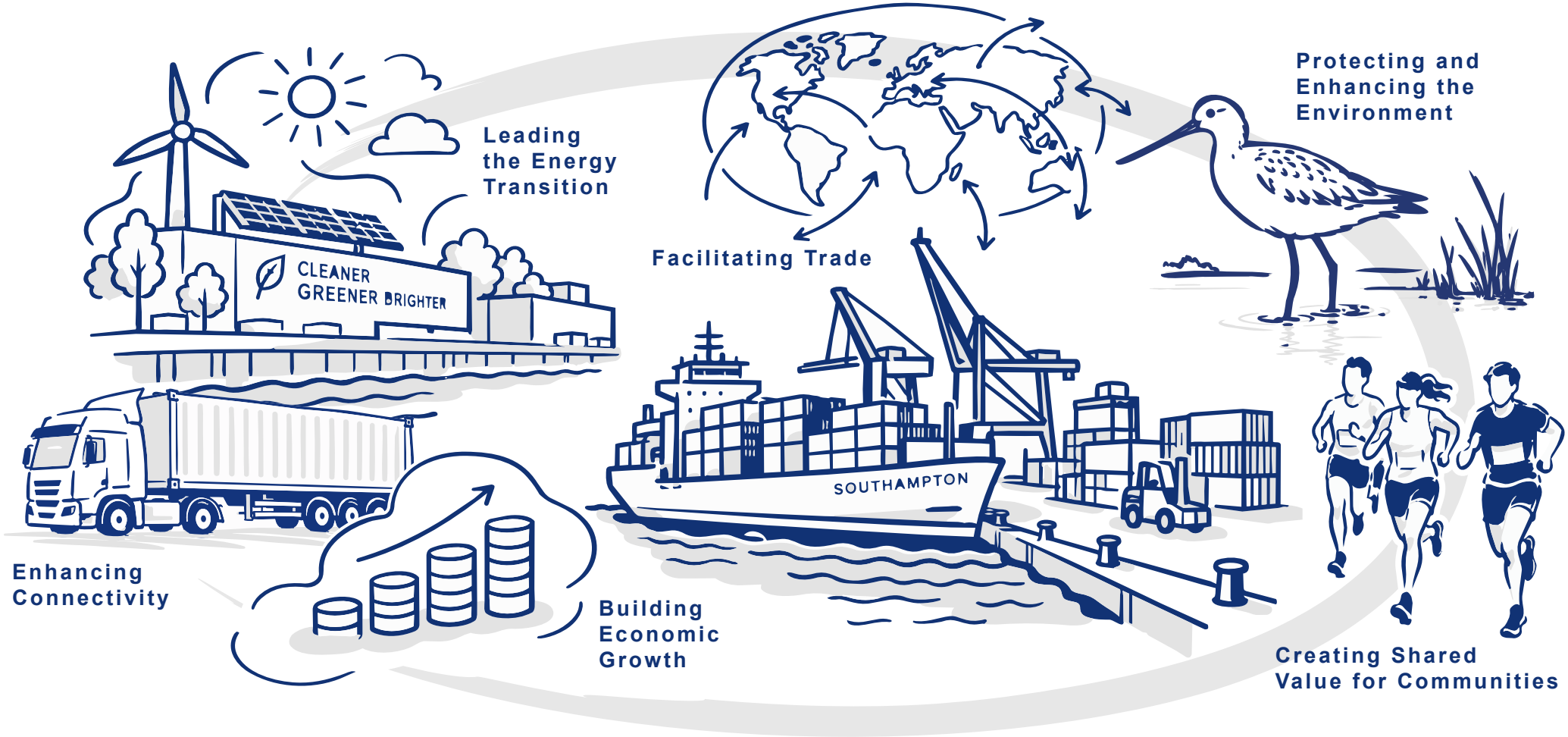


Alastair Welch
Director
Port of Southampton

Opportunity | Vision

The Port of Southampton is a major international deep-sea port of significant global importance that makes a vital contribution to the national, regional and local economy.

Masterplan Vision



Masterplan Vision

Our vision is to be the UK's leading sustainable gateway port: driving economic prosperity, enabling global trade and delivering net-zero operations through innovation, resilience, and operational excellence.

We want to be leading the way in sustainable port management enabling UK businesses to trade with the rest of the world in a way that ensures our environmental footprint is the lowest it can be.

Against this background, we have prepared this Port of Southampton Masterplan. It sets out our 'Strategy for Growth' to 2050 to ensure that the Port continues to make a significant contribution to the economic success of the local area and the UK as a whole.

The Port of Southampton is owned by the UK's largest and leading ports group, Associated British Ports (ABP).

Our ports collectively handle 25% of UK seaborne trade, worth over £150 billion and play an important role in the energy transition as locations for renewable energy supply chains and generation.

ABP contributes £15bn of Gross Value Added (GVA) to the UK economy, supports more than 200,000 jobs across the UK economy and provides jobs that are a third better paid than the UK average.

Given the significance of the Port of Southampton, we recognise the benefit of setting out our vision for the future development of the Port and sharing this with stakeholders in a way that will help to shape the Port's future.



Masterplan Objectives

The purpose of the Port of Southampton Masterplan 2027 - 2050 is to:

- **Set out our understanding of freight and passenger forecasts.**
- **Work with stakeholders to identify areas where the Port can contribute to wider sustainable economic development.**
- **Identify future potential strategic infrastructure needs for the medium to long term thereby assisting stakeholders in preparing their own development strategies.**

To meet our vision, we believe we will need to enable the delivery of the following objectives:

1. **Facilitate Trade** by meeting customer demand and providing efficient, reliable, and future-ready infrastructure that enables the movement of goods and people while reducing environmental impacts.
2. **Enhance Connectivity** by strengthening maritime, rail and road links to create seamless supply chains and improve access to global markets for UK businesses.
3. **Create Shared Value for Communities** by working collaboratively with local stakeholders to ensure the Port remains a trusted neighbour and a source of opportunity for future generations.
4. **Lead the Energy Transition** through decarbonised and energy resilient port operations, alternative fuel infrastructure, shore power provision, and support for emerging clean energy industries.
5. **Support Economic Growth** by attracting investment, creating high-value jobs, and acting as a catalyst for regeneration and prosperity across Southampton, Hampshire, and the wider South East.
6. **Protect and Enhance the Environment** through responsible stewardship of Southampton Water and the Solent, climate resilience, and undertaking sustainable development.



The Port Today

Southampton is a leading UK port in each of its main cargo sectors supporting businesses locally, regionally and nationally and connecting the UK with the global marketplace. We are also the UK's leading cruise port.

The Port Today

The Port of Southampton is a dynamic international transport hub that operates 24 hours a day, 365 days per year.

We are one of the UK's primary trading ports handling over £60 billion of goods per annum. We are a key export port linking the UK with the global marketplace.

Key trades of national significance handled by the Port include containers, cars, cruise, bulks and petrochemicals. The Port is a critical stopping point on the world's busiest trade route from the Far East, a gateway to global markets for UK businesses and the busiest cruise port in the UK.

Supporting over 17,000 jobs and generating in the order of £6.5 billion GVA, the Port's significant contribution to the economy is clear.

The Government recommends that major ports produce masterplans in order to help co-ordinate future planning with local planning authorities and communities.

This Masterplan updates the previous Plan issued in 2016.



Supporting over

17,000 jobs

and generating in the order of

£6.5 billion GVA

The Port Today

In spatial terms, the Port area comprises the following areas:

1. **Eastern Docks**
2. **Town Quay**
3. **Western Docks and Container Terminal**
4. **Eling Wharf**
5. **Marchwood Industrial Park**
6. **Solent Gateway (Marchwood Military Port)**
7. **Strategic Land Reserve**



The Port Today

Eastern Docks

The Eastern Docks predominantly serves the automotive and cruise sectors and is home to six multideck car parks and two cruise terminals as well as the National Oceanography Centre.

Town Quay

Town Quay is home to a number of businesses as well as the Red Funnel ferry operation. Town Quay has planning permission for redevelopment to provide residential and commercial uses including the creation of a new hotel. Royal Pier and the adjacent Mayflower Park are included within Southampton City Council's regeneration proposals which extend from the area of Town Quay, along West Quay Road up to Southampton Central Railway Station.

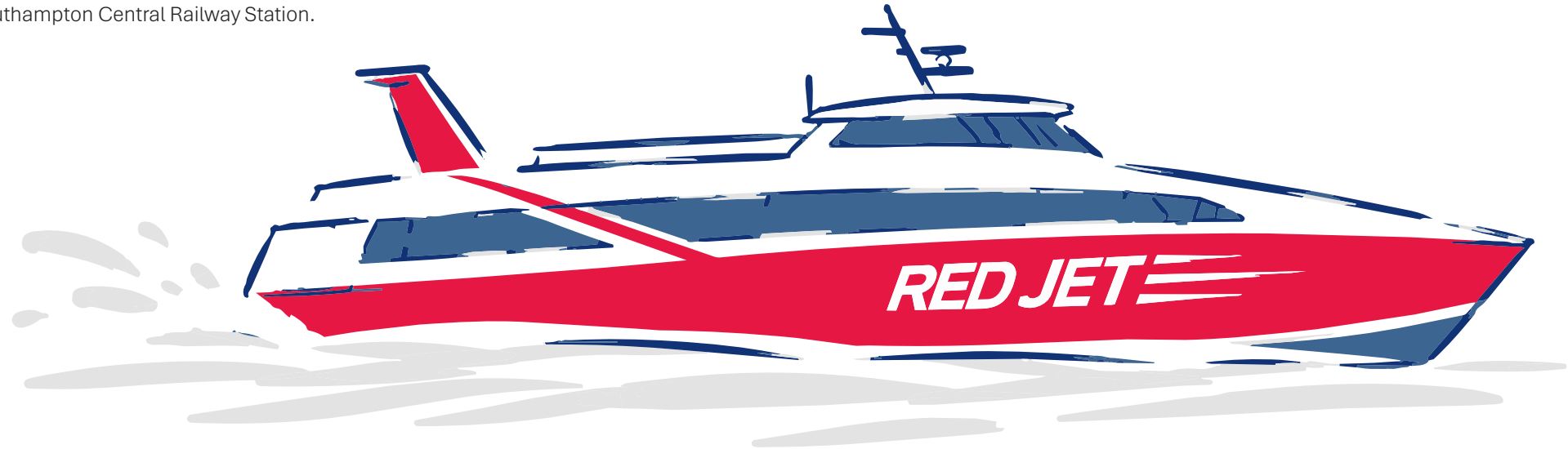
Western Docks and Container Terminal

The Western Docks comprises a mixture of uses, namely the City, Horizon and Mayflower Cruise Terminals, a dry bulks terminal and container handling and rail freight terminal operated by Solent Stevedores, as well as automotive storage and cruise parking utilised by multiple customers.

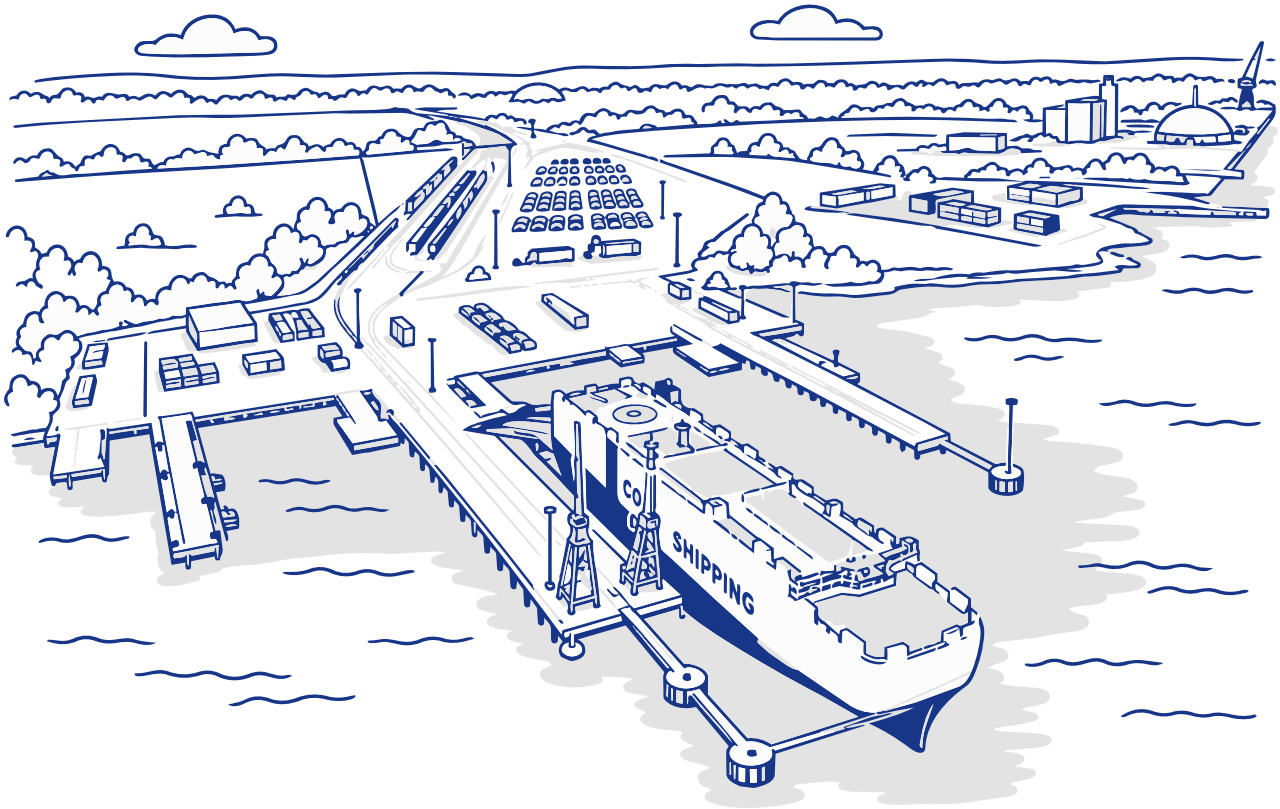
The Southampton container terminal, operated by DP World, comprises deep sea berths, cranes and container storage yards and is supported by logistics warehousing and the Freightliner and Solent Stevedores rail terminals.

Marchwood Industrial Park & Eling Wharf

Marchwood Industrial Park represents one of the major employment areas within the New Forest. Eling Wharf, also an important local employment site, is located adjacent to the town of Totton. The sites are occupied by a range of industrial, commercial and storage uses – many of which are port or marine related.



The Port Today



Solent Gateway (Marchwood Military Port)

ABP operates Solent Gateway under a Concession Agreement (lease arrangement) until 2051 from the Ministry of Defence to facilitate the movement of commercial (mainly automotive) cargo as well as military traffic through the Port.

Over £100m has been invested since 2023 to improve facilities to a modern day port standard providing additional storage capability and an upgrade of marine infrastructure whilst continuing to support vital military operations to our Armed Forces around the world.

Strategic Land Reserve

Our Strategic Land Reserve consists of an area of land reclaimed from the estuary in the period from the 1930s through to the 1970s and areas of woodland and pasture located to the rear of the reclaimed land.

The reclaim was bought in 1967, when it was partly complete, by ABP's predecessor, the British Transport Docks Board, as operational land and a strategic land reserve for future expansion of the Port of Southampton. Since the late 1960s, the reclaim has been safeguarded for future port use.

The Port Today

- **In 2025 the wider port facilities of Southampton handled 34 million tonnes of freight.**
- **The commercial port handled £60 billion of goods.**
- **We welcomed over 3 million cruise passengers.**
- **We are one of the UK's primary gateway ports to the rest of the world.**
- **We support over 17,000 jobs regionally and generate over £6.5 billion in GVA for the economy.**

Containers

Southampton is home to one of the most efficient container terminals in Europe. The Southampton Container Terminal, operated by DP World, is one of only three deep sea container terminals within the UK. Handling circa 2.0m TEU[1] every year, the terminal and the associated logistics support network are major employers within the region.

Automotive

We handle around 500,000 units per annum with imports recently leading the market share from, historically, an export led sector. Major brands handled by the Port include Jaguar Land Rover, Mini, Ford, Tesla, BMW, BYD and Jaecoo. We also handle a large number of 'High and Heavy' plant and equipment such as JCBs, CAT and New Holland tractors for export.

Cruise and Passengers

Southampton is the UK's premier cruise port and in 2025 we welcomed around 500 vessel calls and over 3 million cruise passengers at the terminal. The Port accounts for circa 90% of the UK's home port passengers through our five cruise terminals.

Southampton is also home to one of the key ferry routes between the Isle of Wight and the mainland. The Red Funnel operation transports 2.3 million passengers and 800,000 vehicles on over 30,000 sailings every year.

Dry Bulks

In 2025 the Port handled over 1.1 million tonnes of dry bulk cargo. Dry bulk cargoes include a wide range of commodities including grain, cement, fertilisers, minerals and aggregates, animal feed and scrap metal supporting a regional hinterland.

Project Cargo

Project cargo is generally bespoke and likely to support specific construction or maintenance projects. This type of cargo generally needs large areas of open storage suitable for outsized, abnormal loads.

Liquid Bulks

The Exxon refinery at Fawley and the marine fed fuel terminal at Hamble form one of the UK's leading hubs for the import and export of liquid bulk oil and fuel cargoes. In 2025 over 20 million tonnes of liquid bulk products passed through the refinery facilities on over 2,000 vessel arrivals.

[1] TEU is a Twenty Foot Equivalent Unit – the industry standard for containers


ASSOCIATED
BRITISH PORTS
WALLENIUS WILHELMSEN

Policy Context

Government policy supports the sustainable development of ports to meet future demand and provide resilience for the UK economy.

Planning Policy Overview

National and local policies support the Government's overarching objectives recognising that ports are critical to the Government's economic growth mission.

Ports have an important role in transitioning to a green economy, and making Britain a green energy superpower.

Recognising the critical role of ports in the wider supply chain and national freight network, it is the Government's policy to encourage sustainable port development to contribute to long-term economic growth and prosperity.



National Ports Policy

In July 2026 the Government published the National Policy Statement for Ports (the NPS) which sets out the Government's policy on the need for new port infrastructure, consideration of the place of ports in the national economy, the available evidence on future demand and the options for meeting future needs.

The NPS stresses the essential role of ports in the UK economy with around 85% of the UK's trade in goods by weight being moved by sea and DEFRA reporting that the UK imports 40% of its food.

The NPS emphasises that the need for port infrastructure depends not only on the overall demand for port capacity but also on the need to retain the flexibility that ensures port capacity is located where it is required and promotes effective competition and resilience in port operations.

Government policy recognises that there is a compelling need for substantial additional port capacity to be delivered through the existing and future development consents.

Preventing the growth and increased capacity of ports would be strongly against the public interest, limit economic growth and limit the local and regional economic benefits that new developments might bring.

Freight and bulk movements

The NPS identifies that as an island economy, there are limited alternatives available to the use of sea transport for the movement of freight and bulk commodities. Air freight is often used for high-value items and express deliveries and the Channel Tunnel has a significant role in freight. However, these alternatives are constrained by the volume that can viably be delivered by these routes.

Consequently, shipping will continue to provide the only effective way to move most freight in and out of the UK, and there is general policy support to ensure the provision of sufficient port capacity to facilitate sustainable economic growth.

National policy therefore encourages sustainable port development to enable long-term growth in the volume of imports and exports by sea by fostering a competitive and efficient port industry capable of meeting the needs of importers and exporters in a cost effective and timely manner.

Energy supplies

The Government's mission to make the UK a green energy superpower means that the role of ports in the offshore wind sector and ensuring the handling of energy supplies will be essential for the UK's energy security.

The NPS recognises that ports will need to be responsive to the different types of energy supplies needed and changes to the geographical pattern of demand associated with the evolving energy landscape.

Government policy is expressly supportive of sustainable development which provides additional capacity for the development of renewable energy and increases or improving energy infrastructure in ports, aiming to provide the confidence to encourage the necessary investment.

National Ports Policy

Tourism and leisure

Sea ports play an important role in the tourism and leisure industries, supporting many different forms of economic and social activity; including passenger cruise liners, Channel ferries, sea-going yachts and dinghies.

The cruise sector brings economic benefits to the UK, particularly in coastal communities as ships bring larger numbers of visiting passengers to these area.

The cruise trade association, Cruise Lines International Association, estimates that the economic benefit of cruise activity to the UK economy is £6.3 billion (2024) - Southampton accommodates 85% of the UK cruise market providing thousands of job throughout the supply chain sites.

The NPS highlights the economic importance of the sector, directly supporting development that is an engine for economic growth.

Wider economic benefits

Ports play an important role in local and regional economics, further supporting national prosperity. In addition to providing direct employment, ports are pivotal in supporting the UK maritime sector as well as the smooth flow of international trade on which the nation relies.

By bringing together groups of related businesses within and around the estate, ports create a cluster effect which supports economic growth by encouraging innovation and the creation of new business opportunities.

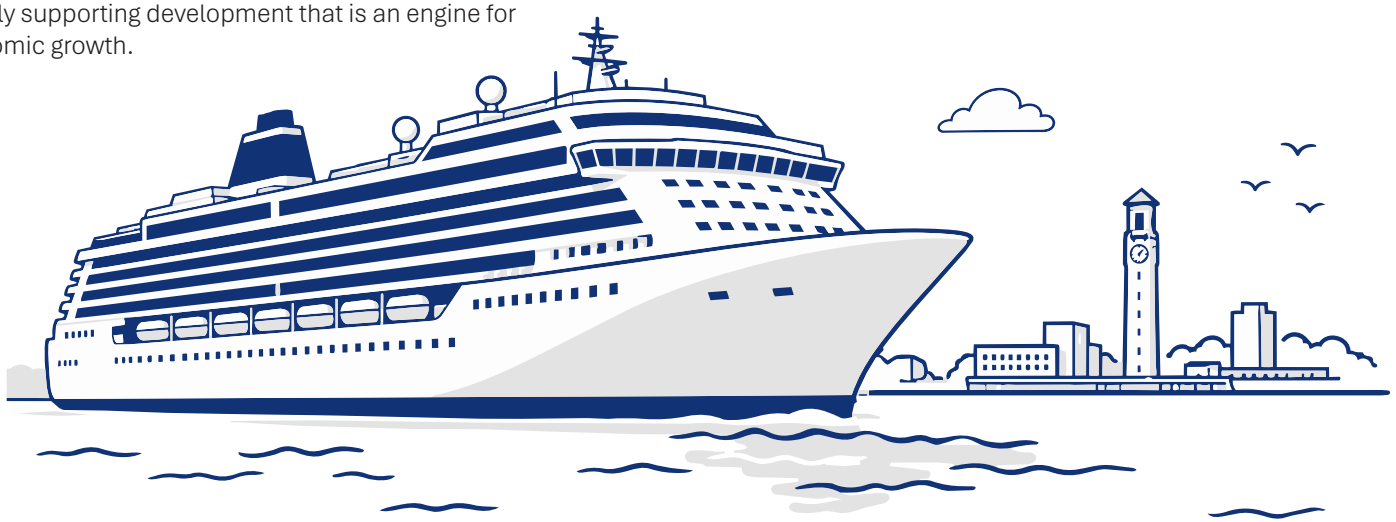
The NPS seeks to increase the overall productivity of the sector by supporting development that enhances the connectivity of and access to ports, including the jobs, services and social networks they create.

Freeports

The NPS supports the delivery of Freeports incorporated in a wider set of Industrial Strategy Zones, to promote regeneration and job creation; to act as national hubs for global trade and investment; and to create hotbeds for innovation.

The Solent Freeport incorporates Solent Gateway, our Strategic Land Reserve and part of the Western Docks as either tax or customs designated sites. Development within tax site areas can benefit for a range of government-backed incentives to encourage investment with the aim of strengthening trade, innovation development, skills and economic opportunities.

Further information can be accessed at **solentfreeport.com**



National Planning Policy Framework

National Planning Policy Framework

The National Planning Policy Framework (NPPF) was published in August 2026 setting out the Government's policies for making decisions on development proposals in England.

The NPPF describes the purpose of the planning system is to contribute to the achievement of sustainable development by managing the use and development of land in the long-term public interest.

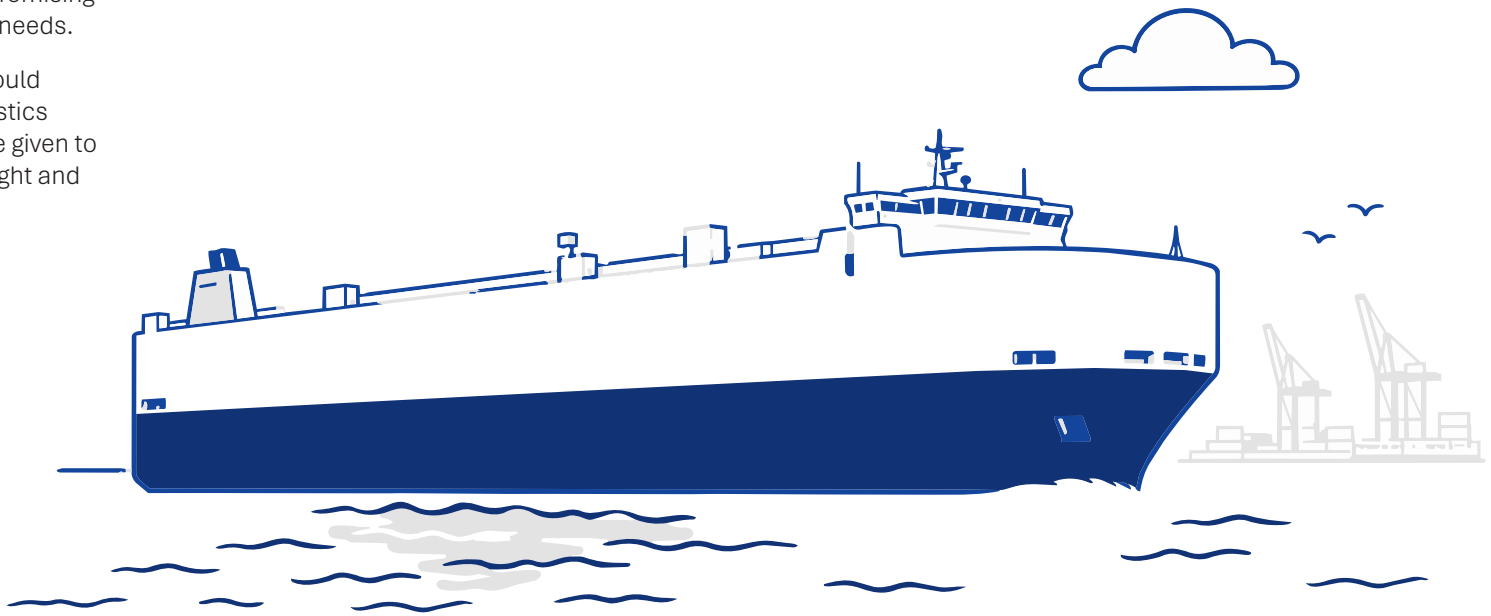
At a high level, the objective of sustainable development is meeting the needs of the present without compromising the ability of future generations to meet their own needs.

NPPF indicates that Local Development Plans should allocate sites making provision for freight and logistics operators noting that substantial weight should be given to applications supporting improvements for the freight and logistics sectors.

Achieving sustainable development means delivering proposals in accordance with three interdependent and mutually supportive objectives:

1. **An economic objective** – to help build a strong, responsive and competitive economy.
2. **A social objective** – to support strong, vibrant and healthy communities.
3. **An environmental objective** – to support efforts to mitigate and adapt to climate change, including moving to a low carbon economy.

In addition to the general support for sustainable development, the NPPF provides a range of specific policies that are an important material considerations against which specific development proposals will be assessed.



Local Planning Policy

Local Planning Policy

Planning law requires that all planning decisions should be made in accordance with the adopted Local Development Plan (LDP), unless material considerations direct otherwise. In their role as the local planning authority councils produce LDPs which provide specific policies against which planning applications must be assessed.

The LDPs relevant to this Masterplan are the Southampton City Council LDP and the New Forest District Council LDP.

The LDPs aligns with the Government's objectives set out in national policy to support port and economic development commensurate with its importance and value to the local, regional and national economy.

The high-level policy position of each LDP is set out below.

Southampton City Council LPD

The Southampton City Council LDP includes the following Development Plan Documents:

- Amended Core Strategy (2015).
- City Centre Action Plan (2015).
- Amended Local Plan Review (2015).

The Amended Core Strategy (2015) sets out that the Council will promote and facilitate the growth of the Port including supporting an increase in transhipments, rail freight and appropriate road improvements.

Southampton's LDP recognises the importance of the Port highlighting that it has global significance and is a key part of the national economic infrastructure.

This recognition is supported by the City Centre Action Plan (2015) which directly supports the growth and overall competitiveness of the Port, referencing the national significance of the Port, the local and regional significance city centre, and the need to coordinate development to ensure that proposals do not adversely affect the Port's operations.

New Forest District Council LDP

The New Forest District Council LDP covers all parts of the New Forest District that are outside of the National Park.

The New Forest District Council LDP includes the following Development Plan Documents:

- Local Plan 2016-2036 Part 1: Planning Strategy (2020).
- Local Plan Part 2: Sites and Development Management (2014).
- Core Strategy (2009).
- New Forest District Local Plan First Alteration (2005).

The Local Plan 2016-2036 Part 1 safeguards land at **Marchwood Port** for port and port-related uses. The LDP commits that the Council will work co-operatively to enable the effective and efficient use of the Port facility.

New Forest's Core Strategy and Local Plan Part 2 highlight the importance of the marine sector to the regional economy.

The Local Plan recognises the benefits of the Port and commits that in the event an expansion of port activities is sought at the **Strategic Land Reserve**, the Council will work to seek the best outcome for local communities. This includes producing a Local Impact Report to set out the likely impacts of any proposed development and to identify how and to what extent they may be resolved, mitigated or compensated for.

The Local Plan Part 2 supports mixed use development at **Eling Wharf**, specifically recognising the benefits associated with achieving a long-term viable use at the site to the local economy and environment. The LDP encourages employment and business development in conjunction with residential development to optimise the use of the site.

Cracknore Industrial Park and **Marchwood Industrial Park** are identified in the Local Plan Part 2 as appropriate locations for the development, redevelopment and intensification of employment uses. The LDP recognises the value of marine and marine-related businesses in this context, stating that the Council encourages such uses.

Any future developments will have due regard to the Hythe and Dibden Marchwood and Totton and Eling Neighbourhood Plans.


ASSOCIATED
BRITISH PORTS

Current Land Use

Efficient port land use must combine modern day specialist infrastructure, sufficient and appropriate berthing space, as well as extensive areas for freight and passenger handling, storage and logistics requirements.

Current Land Use

Our land usage constantly evolves in anticipation of and in response to the changes in global trade.

The manner in which freight and passengers move through the Port on a daily, weekly and seasonal basis is fundamental to our operational efficiency and capability.

Efficient land use is fundamental to port operations.

Our Port land use approach is founded on the following principles:

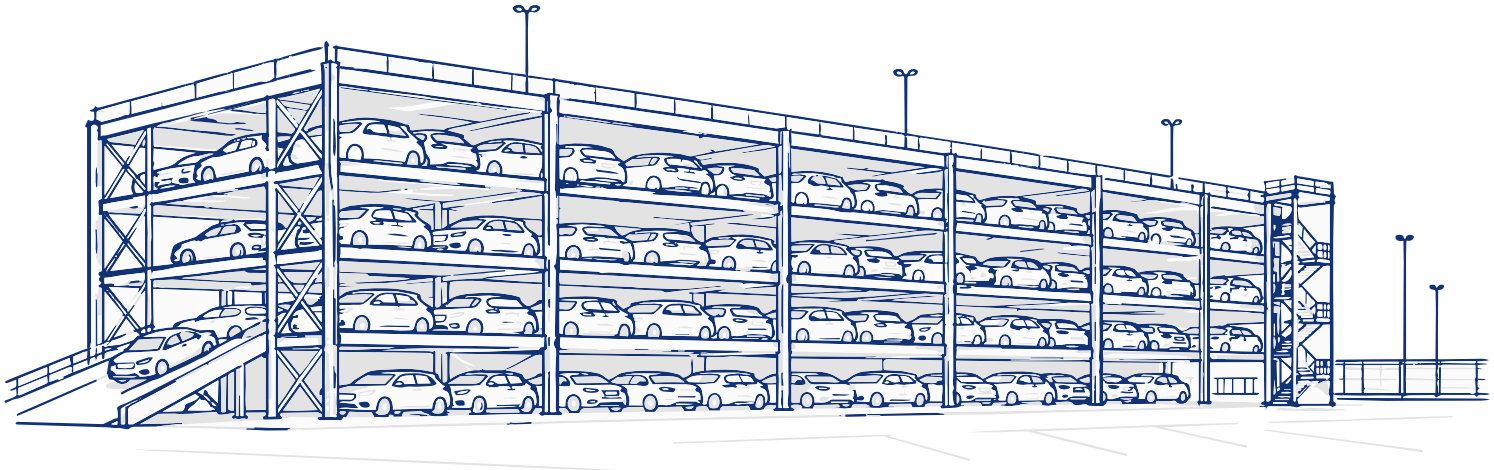
1. Progressive removal of non-port related land uses.
2. Land being increasingly allocated to the Port's key trades.
3. Intensification of land use.
4. Acquisition of additional land to support port operations and supply chains.
5. Increasing specialisation in port related land use.
6. Deconflicting operations, i.e. dedicated handling facilities for each cargo sector.

Demand for port land and services continues to grow and the UK's trading patterns with the rest of the world continue to influence the nature of the land use within the Port areas.

One of the main issues arising in recent times results from the growing size of vessels and the size of consignment volumes arriving at the Port.

Infrastructure, such as the construction of automotive multideck storage facilities and investment in new technologies to maximise efficient use of space and freight movements.

The acquisition of new land holdings such as Marchwood Industrial Park and Solent Gateway, have been implemented, intensifying and specialising land use and have served the Port well in recent years.



Operational Challenges

Challenges arising from freight and passenger demand will shape our future infrastructure requirements.

These challenges are:

- **Market demand.**
- **Ongoing growth in trade.**
- **Fewer useable berths.**
- **Depths of berths.**
- **Larger cargo parcel sizes and an increased number of passengers per call.**
- **Longer cargo dwell time.**
- **Limitations of existing infrastructure.**
- **Coexistence of cargo handling activities.**
- **Conflicts between trades.**

Market Demand

As vessels increase in size and as larger consignments arrive in the UK, there are fewer ports that have the capability to service these ships. Southampton is one of the deep sea ports capable of handling both larger ships and larger consignments but we need to alter our infrastructure to suit this change in demand. Newer infrastructure will enable Southampton to support trade flows with the global marketplace providing port resilience for the UK.

Fewer Useable Berths

As vessels are getting larger, the number of vessels able to be accommodated along a specific length of quay is reduced. These means that, in effect, the number of useable berths at the Port is decreasing.

For example, the Western Docks has historically provided up to nine operational berths, but, when three large cruise vessels are moored alongside – a frequent occurrence – the Western Docks only then has limited capability for further vessels (depending upon size).

Similarly, over time the Container Terminal has changed from a facility that had seven active berths in the late 1990s to a facility that now handles three to four container vessels at any one time.

Depths of Berths

The majority of the berths at the Port are now considered to be near their limits in terms of alongside depth due to the original engineering design specification.

Further deepening of the alongside berth pocket is not considered possible at most berths without undermining the quay itself. With the global fleet increasing in vessel size, this is becoming an increasingly important issue for many UK major ports.

Larger cargo parcel sizes and an increased number of passengers per call

Larger ships result in a larger amount of cargo or a greater number of passengers needing to be handled for every vessel call.

This increases the pressure on land side infrastructure within the Port as a result of the amount of land space being required to handle a greater amount of cargo / number of passengers per vessel call. It also means that vessels may be moored at the berth for longer periods of time, reducing operational flexibility.

Operational Challenges

Longer Cargo Dwell Time

Dwell time is the amount of time that cargo spends in the Port. Efforts to minimise dwell time are vigorously pursued so that the same space can be used as many times as possible throughout the year optimising land use efficiency.

Dwell time is a critical factor within the automotive sector with imported vehicles potentially having a dwell time up to four times the duration of an export vehicle. By way of an example, a port handling 500,000 units of imports will require four times the spatial extent of an export facility typically handling 500,000 units.

With the changing nature of the automotive industry (and with fewer vehicles manufactured within the UK) we are seeing a greater number of imported vehicles to meet consumer demand. This particular aspect of change is significant for current market conditions.

Limitations of Existing Infrastructure

Due to the increased size of vessels and the various available depths of water alongside, not all vessels can use all berths. Vessels are allocated berth space according to their draught and the proximity of the supporting infrastructure alongside for that trade.

For example, it is no longer possible for the QEII Cruise Terminal to accommodate the full range of cruise vessels that visit the Port. This is because the cruise terminal building is located too close to the quay edge and the superstructure larger cruise vessels is in conflict with the terminal building and its passenger air bridges.

This particular terminal also has significant constraints for coach space and cruise parking because of the need to facilitate the automotive trade in close proximity.

Coexistence of Cargo Handling Activities

A further issue that results from the layout of the Port and the fact that some automotive activities are currently situated in the same area as cruise activities, means that automotive storage areas are often not located close to the berth being used by the vessel unloading or loading cargo – which is the ideal scenario from an operational efficiency perspective.

This can often require cargo from automotive vessels to be double or even triple handled whilst at the Port (i.e. moved between different berths) or it requires automotive cargo to be moved long distances between the berths and the storage areas within the Port.



Land Use Challenges

Conflicts Between Trades

The Port by its nature is a 24-hour, 7 days per week operation and this means that different operations are required to take place alongside each other.

The greater the amount of cargo handled or passengers moved, the greater the probability of conflict arising certain parts of the Port are used by a number of different trades during the course of the year. They are not dedicated for use for one particular trade and referred to as common user areas.

This is particularly the case within both the Eastern and Western Docks which are used for both the automotive and cruise sectors.

The nature of the cruise trade is such that vessel arrivals and departures are carefully planned and scheduled a considerable period of time (years) before the vessel arrives at the Port.

The automotive trade is different in that the vessels, in general, run on a particular route with various port stops to load and unload cargo. It can often be the case that the Port does not know until several hours before arrival precisely when a Ro-Ro vessel is going to arrive or the size of its cargo consignment.

These two trades, therefore, come into conflict in terms of both berth use and the use of landside areas within the Port. Due to the nature of the two trades it is the automotive activity which has to 'fit in' around the cruise activity.

Handling a greater amount of cargo or an increased number of passengers within a constrained area within the Port can lead to internal conflicts within the Port as cargo and passengers are moved around.

These issues are exacerbated by security requirements whereby cruise berths and terminals must be segregated from other port activities. These areas and activities are required to be secure facilities for a longer period of time than simply when the cruise vessel is moored alongside. For example, a cruise vessel might be physically alongside for a period of 9 hours but the surrounding area may well be segregated for a period up to 24 hours reducing the amount of time the 'cruise' berth and surrounding land can be used by another sector.

A further example of conflict is within the Eastern Docks where, due to the size of cruise vessels, a cruise ship moored at the Ocean Terminal in the Ocean Dock severely restricts the ability to use the opposite berth of the Dock.

The consequence of these challenges in the context of growing demand means that the Port of Southampton needs to continue to invest in its infrastructure to ensure that it can continue to support UK businesses as a primary intermodal hub for trading opportunities with the rest of the world.


ASSOCIATED
BRITISH PORTS

Objectives

Our Masterplan has identified six key objectives designed to support and accommodate port activities over the duration of this Masterplan.



Objective 1

Facilitating Trade

Our aim is to meet customer demand by providing efficient, reliable and future-ready infrastructure that enables the movement of freight and passengers.

Demand for our facilities and services is predicted to grow.



Future Market Demand

Demand for port land and port-related services is expected to be significant over the lifetime of this Masterplan.

To continue to be an international gateway port and support the local, regional and national economy, we will need to invest in providing fit for purpose infrastructure capable of meeting changing nature of trade and shipping, support logistics chains and provide resilience for both shipping activity and UK businesses trading with the rest of the world.

In the past decade, we have acquired additional land at Eling, Marchwood and Solent Gateway to address the physical land constraints of the Port.

We recognise that we will have to continue to innovate to address these practical constraints. If we are unable to meet this challenge, and unable to handle customer requirements, it may mean a decrease in capability.

The Government is clear that ports need to be competitive and operate at efficient levels, which is not the same as operating at full physical capacity.

In order to keep pace with the changing and growing nature of trade in each of the sectors which use the Port of Southampton, we have identified a range of infrastructure that we believe positions the Port as a port for the future.

Demand is one aspect of port masterplanning. Planning for the future must take account of a number of variables including vessel size, consignment size and ensuring that ports are resilient to withstand global market shocks.

Proceeding on the basis of not accommodating the predicted demand at Southampton would, to use the words of National Ports Policy, be a choice that accepts a limit on economic growth and the price, choice and availability of goods imported into the UK and available to consumers.

It would also reduce the local and regional economic benefits that new developments might bring. National Ports Policy states that such an outcome would be strongly against the public interest.

Our view is, therefore, that the Port should continue to develop and expand so that it can accommodate the future growth and needs of trade.

It is also our view – and one which has been accepted by key stakeholders such as relevant local authorities – that the only area of land capable of accommodating long term physical expansion of the Port of Southampton is the Strategic Land Reserve.

Future Market Demand

Our forecasts of future demand, produced by maritime consultants, Haskoning, are informed by customers' market expectations, global market indicators, national statistics and forecasts published by the Office for National Statistics (ONS) and the Department for Transport (DfT).

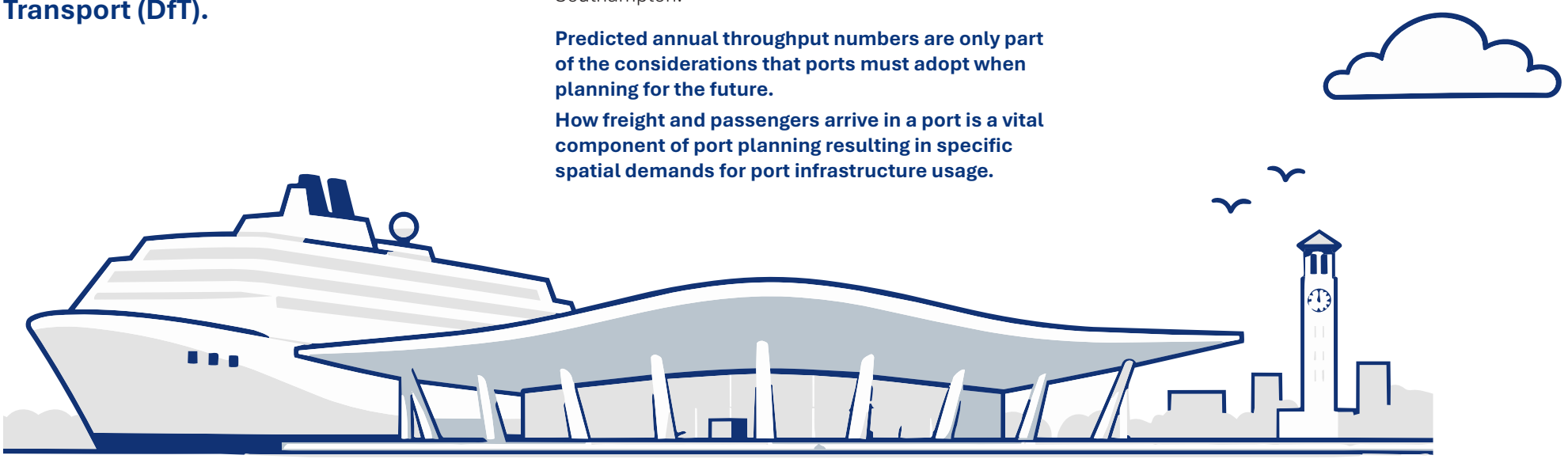
In seeking to arrive at robust future forecasts, we have reviewed the main freight sectors handled at the Port of Southampton.

All ports have their own unique set of circumstances, such as location, transport links, proximity to end markets and marine access have an influence on future demand.

For the same trade, demand can differ widely from port to port. As a result of these factors, our forecasts take into account local matters that are unique to the Port of Southampton.

Predicted annual throughput numbers are only part of the considerations that ports must adopt when planning for the future.

How freight and passengers arrive in a port is a vital component of port planning resulting in specific spatial demands for port infrastructure usage.



Future Market Demand

National Forecasts to 2050

The National Policy Statement for Ports (NPSfP), published by the DfT in 2026, support forecasts for freight demand for the whole of the UK.

DfT predicts that by 2050 there will be the following increases in freight traffic across all UK ports:

- 182% increase in container traffic.
- 101% increase in ro-ro (roll on/roll off) traffic.
- 4% increase in non-unitised traffic.

Note DfT does not produce forecasts for cruise passenger volumes.

Southampton Trade and Demand Forecasts to 2050

Over the period of the Masterplan, our forecasts show an increase in freight volumes for all sectors. These forecasts do not make assumptions about the availability of future capacity to meet the level of throughput forecast, but assume that the forecasts are unconstrained.

Our local forecasts for 2050 for the main sectors handled at the Port are set out in table below using the base case scenarios.

ABP Forecast figures	2025 throughput (actual)	2050 throughput (base estimate)	% increase (from 2025 to 2050)
Containers (TEU)	1,800	2,500	33
Automotive (units)	450	914	68
Cruise (passenger movements)	3,005	4,000	33
Bulks (tonnes)	1,100	1,850	51

TEU is a Twenty Foot Equivalent Unit – the industry standard for containers


ASSOCIATED
BRITISH PORTS
ONE

Containers

The space occupied by the container terminal is largely expected to remain similar in the future as it is today due to overall constraints on space in the Western Docks. Intensification of the site will be the objective in the future by minimising dwell time and maximising existing terminal areas.

Determining the capacity of a container terminal is influenced by a number of factors. The size of container vessels is a dominant factor. Hub ports such as Southampton receive the largest vessels in class.

Some containers may subsequently leave the Port by sea on a smaller vessel to a smaller port – this is known as transhipment and accounts for circa 7-8% of all container moves.

Larger vessels result in a greater number of containers being exchanged at a port per visit – this can be in excess of 7,000 boxes per vessel in Southampton during peak times.

Southampton can often be the first port of call in Northern Europe for these large container vessels meaning that the ships arrive in port with a significant draught.

These factors mean that the Port must plan for appropriate spatial requirements and supporting infrastructure such as cranage, transport and warehousing as well as navigational depth to meet these needs.

This trend of increasing TEU[1] capacity of deep sea container vessels calling at the Port is expected to continue, as shipping companies drive for efficiency with large ships used for the movement of goods between hub ports and smaller capacity hub ports to smaller ports.

We expect that the number of container vessels will rise relatively slowly and that vessel capacity and number of boxes exchanged per call will increase.

We estimate that the likely capacity is in the region of circa 2.5 million TEU per annum due to space constraints. Forecasts indicate that this estimated numerical capacity would be reached at some point in the period 2030 - 2035.

Additional capability will be delivered by dredging of the Port's navigational channel, some berth deepening, the arrival of new craneage and container handling equipment. Focus will continue to be on minimising the dwell time of containers on port land.

In recent years, there has been a significant increase in the number of refrigerated containers requiring a continuous power source to maintain the temperature of goods. Investment in additional power requirements and cabling has been delivered and it is possible that further land may be required for this subsector of this trade through the Port.

In addition, we will be looking at the possibility of providing power to container vessels so that they can switch off their main engines whilst alongside.

Future Containers Infrastructure

- Capital dredging of the main navigation channel.
- Delivery of low emission plant and equipment supported by grid upgrades.
- Provision of shore power to enable vessels to switch off their engines whilst in port.
- Intensification of land within the Port boundary for container handling.




ASSOCIATED
BRITISH PORTS
HÖEGH AUTOLINERS

Automotive

Demand for new cars in the UK is predicted to increase over the Masterplan period with forecasts of c 4.3 million units expected to be handled at all UK ports by 2040 with imports accounting for 3.3 million of that total.*

With the significantly higher proportion of new cars being manufactured in the Far East, vehicles are now arriving in the UK on larger vessels in bigger consignments and have a longer dwell time than the export volumes than Southampton has traditionally experienced.

With vehicles now arriving on larger ships and in larger overall volumes at one time, there is a need to accommodate some 5,000 + vehicles arriving on a single vessel.

Additionally, import vehicles tend to have a longer dwell time before distribution to the customer or distributor meaning that space utilisation is less efficient than an export (i.e. vehicles made in the UK) operation.

Larger vessels have generally translated into fewer calls across the course of the year and the longer dwell time means that we are unable to use an individual parking slot as many times across the year than we have done historically leading to an overall greater demand for space.

In our base case scenario, total annual throughput is expected to increase from 450,000 units per annum to circa 914,000 units by 2050 – a base case Compound Annual Growth Rate (CAGR) of 2.2%. The estimated split between exports / imports is expected to be 40/60%.

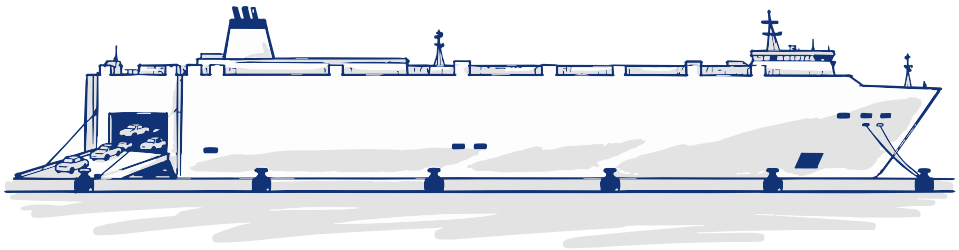
Even to handle the same throughput of units now requires more space and we see the future of the automotive trade centred around the Eastern Docks, Solent Gateway and the Strategic Land Reserve.

Future Automotive Infrastructure

To accommodate the predicted requirements for the handling of future automotive traffic the Port will look to intensify land use with additional multideck storage facilities.

In order to make the best use of port land, further multideck storage facilties could be installed within the Eastern Docks as well as Solent Gateway and Marchwood Industrial Park to support automotive storage requirements in a modern day facility with suitable marine infrastructure.

Relocation of automotive activity away from the Western Docks to Solent Gateway and in due course, the Strategic Land Reserve, will enable the existing Port footprint to accommodate future growth and infrastructure associated with the cruise, container and bulks sectors.



*The Society of Motor Manufacturers and Traders


ASSOCIATED
BRITISH PORTS
MAJESTIC PRINCESS
PRINCESS CRUISES

Cruise

Southampton is a world renowed cruise port and is the largest in the UK. It is the only UK cruise port capable of handling the largest vessels that dominate the cruise market.

As with other trades, the size of cruise vessels visiting the Port has been increasing. The new generation of larger vessels in service and which call at the Port can accommodate over 6,000 passengers.

The forecast for cruise has principally been informed by our customers' own market expectations as there are no central UK forecasts produced by Government.

Southampton cruise volumes are forecast to grow from 3.0 million in 2025 to 4.0 million by 2050 in the base case representing a CAGR of 1.1%.

The increasing size of cruise vessels is a vital consideration. For example, the distance between the terminal and the vessel needed to accommodate the vessel's overhang as well as the passenger facility requirements of these larger ships is placing pressure on the finite amount of land available in Southampton.

Additionally, some of our terminals were constructed many decades ago such that new modern day, purposefully designed, facilities are required to meet the servicing requirements of the sector.

We therefore expect to see the construction of two terminals within the Western Docks as replacement passenger facilities over the lifetime of this Masterplan.

Construction of new modern day terminals within the Western Docks, together with berth availability will place pressure on automotive trade that is currently located within the Western Docks. We forsee that automotive traffic will steadily be moved across to facilities at Solent Gateway and the Strategic Land Reserve within a dedicated, modern handling facility.

The forecast increase in cruise passenger numbers will continue to increase the pressure on land available for associated car parking, both inside and outside the Port.

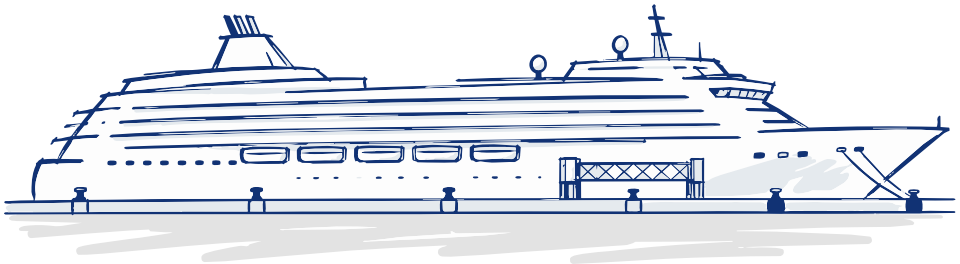
Additional parking facilities are an inevitable requirement of necessary infrastructure within the lifetime of this Masterplan and reflect services provided at other global cruise ports.

Additional on-site parking has the potential to reduce congestion heading into the Port on busy cruise days by reducing the number of two way journeys generated by passenger drop off by friends, family and taxis.

Future Cruise Infrastructure

Our strategy for accommodating the projected increase in the number of cruise passengers comprises:

- New / replacement terminals within the Western Docks.
- Additional on-site parking capability.
- Highway and wayfinding solutions.
- Sustainable public transport solutions.




ASSOCIATED
BRITISH PORTS
EXIT

Dry Bulks

Our base case forecast assumes that Southampton's dry bulk volumes will increase from 1.1 million tonnes in 2025 to 1.7 million tonnes by 2050, a CAGR of 1.7%.

In the order of 1.1 million tonnes of dry bulk cargoes were handled through the Port in 2025.

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.

Dry bulk volumes for Southampton have been forecast by commodity-specific drivers with construction linked materials and scrap metal underpinned by South East England construction GVA growth.

Agricultural trades are predicted to remain flat and are derived from long term forecasts by the DfT. Overall bulk growth is modest and increasingly sensitive to construction market performance over the long term.

Along the River Itchen, but outside the ABP Port of Southampton, are a number of wharf facilities which make a significant contribution to the supply of minerals for construction purposes in South Hampshire and beyond.

The Hampshire Minerals and Waste Local Plan, which forms part of the statutory development plan for the area, safeguards these wharves for mineral use.

The Itchen Waterside area is recognised as having important regeneration opportunities for the City of Southampton. Southampton City Council recognises that the wharves could be redeveloped to create a new waterfront quarter for the city.

It is also possible that in the future, these wharves may no longer be able to meet the needs of the offshore aggregate industry, as the sector moves to the use of larger vessels.

In recognition of these proposals, the Minerals and Waste Plan, whilst safeguarding the Itchen facilities – provides some flexibility within the relevant policies to enable regeneration to occur when and if appropriate.

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 aggregates hub facility.

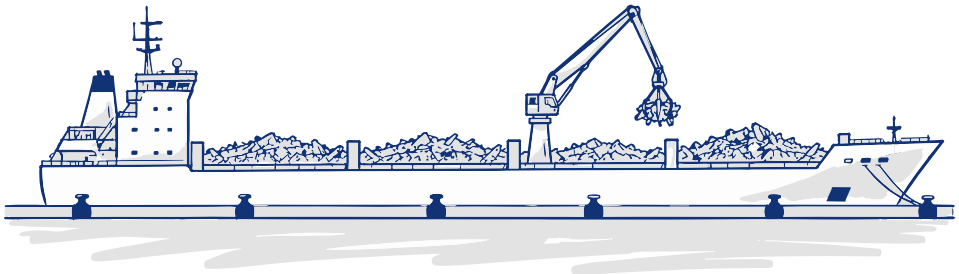
Throughout the lifetime of the Masterplan, we will continue to investigate, along with key stakeholders within the aggregate industry, the possibility of providing land for a deep-water aggregate hub facility within the Southampton port area to enable the regeneration of the Itchen Waterside area.

If such a facility were developed in the Port area, then we estimate that an additional throughput in the region of 750,000 to 800,000 tonnes could be required within the main port estate.

Future Dry Bulks Infrastructure

Additional space will be required for bulks handling and storage facilities during the Masterplan period if the Southampton City Council regeneration plans for the Itchen Waterside are to be realised.

In order to accommodate this need, we envisage the expansion of the existing bulks terminal area within the Western Docks supported by the existing aggregates berth at Marchwood Wharf.



Marchwood Industrial Park and Eling Wharf

Marchwood Industrial Park and Eling Wharf are key employment zones and an economic anchor for the Waterside area.

The sites have the potential to enhance their importance as employment centres supporting strategic marine, transport and energy needs.

We anticipate the following trends over the Masterplan period across both sites as current leases expire:

Land Optimisation – resulting in plot consolidation creating larger sites to reconfigure existing fragmented plots into more commercially attractive sites as well as redevelopment of older, less efficient and underutilised assets.

Modernisation and Premium Offer – the redevelopment of the Parks over time for the next generation of facilities could provide high-spec industrial units with flexible uses to accommodate advanced manufacturing, energy servicing and logistics supported by digital connectivity.

Supporting Growth Sectors – redevelopment of the Parks can provide a major opportunity to support maritime innovation, marine renewables and decarbonisation supply chains as well as port-centric logistics and last-mile distribution provision.

Sustainability and Net Zero transition – tenant demand to modernise often aligns with sustainability goals such as retrofitting or redeveloping to low carbon standards such as EV and HGV charging.

Estate wide Infrastructure Improvements – redevelopment offers the opportunity for the upgrade of general infrastructure such as digital connectivity, internal roads, flood resilience and climate adaptation.

Potential for Enhanced Sector Based Clusters – the future holds the potential for the generation of sector clusters enabling complimentary businesses to group together maximising synergies.

Intensification and Vertical Development – as land becomes constrained we anticipate multideck development and increased building heights to support productivity.

Solent Gateway

Solent Gateway will continue to serve military needs into the future. It will also serve as a primary opportunity to meet automotive sector needs now and long-term.

Since 2023, we have invested over £100 million to upgrade facilities supporting commercial and military operations.

The Solent Gateway site has designated use for automotive trade and is approaching the final stages of implementation in terms of the extant planning permission.

Solent Gateway will continue to be the Ministry of Defence's primary Sea Mounting Centre with current levels of activity continuing throughout the lifetime of the Masterplan. Our planned investment will deliver military resilience and capability.

ABP has the Concession Agreement to operate Solent Gateway until 2051.

The capability of the site overall is governed by the capacity of the jetty i.e. a theoretical maximum that can be reasonably handled over the quay - this figure is approximately 360,000 automotive units per annum.

This number is based on positive assumptions on vessel arrivals and consignment numbers and variations in consumer demand. We therefore expect that a more realistic estimate is more likely to be around 250,000 units per annum over the short term. This figure takes into account reserved use by the Ministry of Defence.

We anticipate the following infrastructure requirements over the Masterplan period within Solent Gateway:

Intensification and vertical development of facilities to accommodate storage requirements – the need for additional storage capacity is already being experienced across the Port. Solent Gateway is a purpose built automotive hub on the South Coast.

Provision of HGV charging points – we anticipate that over the lifetime of this masterplan we will see an increased proportion of the HGV fleet using an electrical powertrain and the Port is an ideal place to charge transporters whilst stationary (e.g. loading vehicles for onward distribution).

Jetty Improvements – to make sure that the site is able to accommodate future military requirements and the next generation of vessels which will dominate the automotive global fleet, improvements to the Falklands Jetty to accommodate the vessel ramps will be undertaken in 2026/27.

Shore Power – new vessels are increasingly being built with shore power capability and therefore it would be prudent of us to plan for shore power capability when there is available grid capability.


ASSOCIATED
BRITISH PORTS
GLOVIS

Strategic Land Reserve

The Strategic Land Reserve is an area of land reclaimed from the sea that has been safeguarded for port use since the 1960s. It remains the Port's main opportunity to meet its long-term growth needs.

Throughout this Masterplan we have considered how the Port can make better and more intensive use of its existing operational estate, through physical improvements, changes in land use and investment in existing facilities. However, our assessment shows that these measures alone will not provide sufficient capacity to meet the Port's needs through to 2050. The development of the Strategic Land Reserve, therefore, remains an important part of our long-term plans.

In 2025 we consulted on our proposals for **Solent Gateway 2 (SG2)**, a new terminal on part of the Strategic Land Reserve to provide additional capacity in response to growing demand, particularly from the automotive sector.

Feedback from communities in Southampton and the Waterside included a clear request for us to show that we had fully explored how to make more intensive use of our existing operational land before developing part of the Strategic Land Reserve.

This Masterplan responds directly to that feedback. It sets out the opportunities we have identified to optimise and intensify the existing Port estate and Solent Gateway in the shorter term. These measures will allow us to respond more quickly to customer and market demand, but do not remove the longer-term need for SG2.

The wider elements of the SG2 proposals also remain integral to our plans. These include: the proposed country park, improved walking and cycling connections between Marchwood and Hythe, and new connection to the A326, taking port traffic away from Marchwood Village. Our intention to protect the associated green areas from development in perpetuity also remains unchanged.

The shorter-term capacity measures identified in this Masterplan will enable us to make better use of the existing Port estate before SG2 is required. Given the significant time needed to consent and construct SG2, we currently expect to return to the consenting process in the early 2030s, ahead of the point at which additional capacity is expected to be needed.

When SG2 progresses, the proposals will be subject to the appropriate consenting and environmental assessment processes including undertaking the necessary environmental impact assessment studies and developing the road and rail connections required to serve the site.

Potential Future Projects



1. Modernisation of site supporting employment and port uses
2. Battery Energy Storage Scheme
3. Further rollout of HGV electric charging points
4. Adoption of zero emission plant and equipment, shore power for vessels
5. Expansion of the Bulks Terminal
6. Wind turbines
7. Battery Energy Storage System
8. Additional cruise parking
9. New cruise terminal
10. West Quay Portside regeneration scheme
11. Replacement cruise terminal
12. Removal of derelict Royal Pier
13. Town Quay Redevelopment Project, with new hotel and residential development
14. New / replacement automotive multideck storage facilities
15. Marine access dredging projects
16. Shore power for vessels
17. Solent Gateway 2
18. Provision of HGV charging points
19. Automotive multideck storage facility
20. New junction with A326 and link road for Solent Gateway and Solent Gateway 2
21. Environmental enhancements
22. Strategic Land Reserve

Potential Alternative Development Locations

The Local Planning Authorities of Southampton, New Forest, the National Park and Hampshire asked us to consider alternative locations where port activity could be based in the future as a means to meeting demand for space.

Specifically, we have been asked to consider the area of Fawley Waterside and facilities at the industrial and commercial parks on the M271 corridor on the approach to Southampton. Again, these areas are not owned or controlled by ABP. They are general employment areas with limited space and no marine access and with no realistic prospect of a rail connection.

Fawley Waterside

Fawley Waterside is currently consulting on regeneration plans to deliver employment opportunities for digital, energy, maritime and start-up businesses on land previously occupied by the power station.

The site is also proposed for the generation of green hydrogen and will be bought forward as a separate application to the main development.

Whilst the site could support some requirements for indirect maritime related businesses, it does not provide the direct marine access required for commercial shipping that visits the Port. Any use of the site for cargo storage would like result in the generation of additional road movements from the Port.

M271 Corridor

The Nursling Industrial Estate located on the M271 corridor provides amongst other things, warehouse and storage capability and is well located to support logistics operations and the movement of goods to and from the Port and the main strategic road network.

Nursling Industrial Estate already has an existing high occupancy rate hosting a number of recognised companies such as Tesco, DFS and B&Q.

Whilst there may be opportunities for some port-related businesses to seek space at Nursling over the timeframe of this Masterplan, it is considered that there is not significant capability to deliver significant acreage at this location.

Similarly, Adanac Park, to the east of the M271 has potential to provide capability for port-related business has a single 1,440 sq m unit available at the time of writing this Plan.

In conclusion there are no credible alternative locations that we are aware of that could be used for port uses without impacting existing or future employment opportunities.

Delivery Timeframe

Sector	Infrastructure Need	Indicative Development Timeframe	Considerations
Containers	Energy for Decarbonisation Activities Net Zero / Low Emission Plant and Equipment	0-5 years 0-5 years	Connectivity Green Energy Employment & Skills Environment
Automotive	Additional spaces (including multidecks) Charging facilities Strategic Land Reserve	0-5 years 0-5 years 10 years	Green Energy Connectivity Employment & Skills Environment
Cruise	New and replacement Cruise Terminals On-site parking	5-15 years 5-10 years	Green Energy Employment & Skills Environment Connectivity
Bulks	Additional space and infrastructure	5-10 years	Growth
Logistics / Supply Chain	Additional warehousing Regeneration of Industrial Parks	5-10 years 0-5 years	Green Energy Employment & Skills Environment

Objective 2

Enhancing Connectivity

Ports rely on strong transport links.
We will strengthen maritime, rail and road links to create seamless supply chains improving access to global markets and support active travel measures for employees and visitors.



Marine

Southampton is located within a sheltered harbour which makes it a prime location for port activity with minimal disruption from bad weather.

Southampton enjoys a unique double high tide, which provides a longer period of high water, generating an extended marine access window for shipping.

We are located a relatively short 28 miles from the major shipping lanes linking northern Europe to the rest of the world.

The Port is one of the very few facilities in the UK - and the only one on the south coast - that can accommodate the large vessels deployed on the global deep-sea container market that are critical to the economy of the UK.

We are the Statutory Harbour Authority (SHA) for the Port of Southampton. The statutory harbour boundary consists of Southampton Water, tidal elements of the Rivers Test and Itchen and parts of the East and Central Solent.

Our statutory role includes duties to regulate shipping and manage safety within the harbour area.

All vessel operations in Southampton Water and the eastern Solent are overseen and controlled by our expert Vessel Traffic Services (VTS) team operating 24 hours per day.

We are also the Competent Harbour (or Pilotage) and Local Lighthouse Authority for the main Southampton harbour area and the Central and East Solent.

This Authority allows us to make provisions for compulsory marine pilots to be present on board a vessel in order to oversee the passage of that vessel from open sea to a berth (and vice versa).

Our hydrography team is constantly surveying the seabed to ensure that safe navigational access is maintained.

We only undertake dredging when it is absolutely necessary.



Rail

Southampton is one of the best rail connected ports in the UK with a third of intermodal volume travelling by rail.

The movement of cargo by rail is, generally, only viable over longer distances and where there are suitable intermodal facilities available at both ends of the journey.

Rail traffic to and from the Port of Southampton includes significant flows to the Midlands, the North West and Scotland.

The main route to and from the Port is via Basingstoke, Reading, Didcot and Leamington Spa, where the line branches to join the West Coast Main Line at Birmingham and Nuneaton. An alternative route via Romsey and Salisbury provides access to the West and offers an alternative to the main northerly route in case of engineering works.

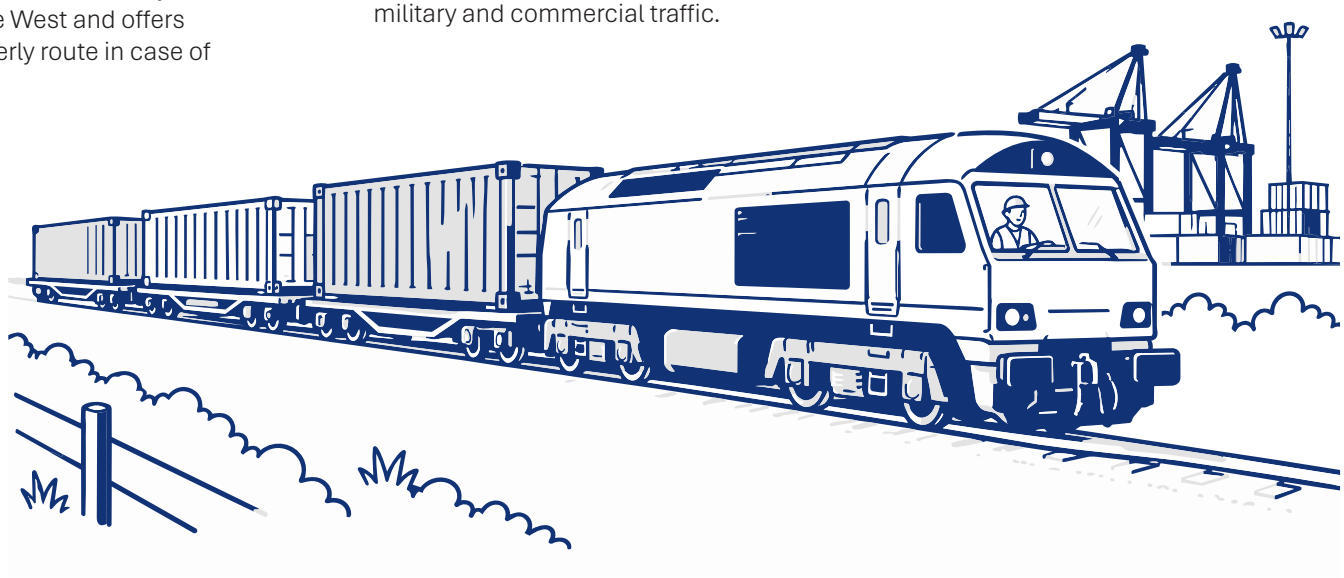
The Port's rail network has separate access to the Eastern and Western Docks. Rail terminals which serve the Port include:

- **Eastern Docks Rail Terminal:** This facility is used to bring UK manufactured cars to the Port for export.
- **Maritime Terminal:** This facility, which serves the container terminal, is located on the Port estate adjacent to the Container Terminal and operated by Freightliner.
- **Solent Stevedores Rail Freight Terminal:** This facility is located within the Western Docks adjacent to the bulks terminal and serves the bulks and container trades.
- **Solent Gateway:** Rail connectivity is available for both military and commercial traffic.

The total number of trains serving the Port on a daily basis is around 40 freight services per day. Around one third of containers are moved to/from the Port by rail.

DP World continues to operate a Modal Shift Programme to incentivise onward transfer of containers from the Port by rail.

We are currently working with Network Rail on its Southampton Area Strategic Study to develop a strategy for accommodating predicted growth in passenger and freight services through Southampton Central Station and the surrounding area.



Active Travel

We have been investing in our cycle lane network within the Port to allow employees and visitors to benefit from a high quality segregated cycle lane to places of employment.

We will continue to work with our customers and all employees to make further improvements over time.

We are currently working on an active travel programme to identify improvements in wayfinding from Southampton Central railway station to the cruise and ferry terminals with the aim on increasing pedestrian activity and reducing road movements.

We actively support our colleagues who wish to cycle into work with the provision of secure bike facilities, showers and financial support to buy bicycles.

We also support RideRide's monthly Bike Dr visits to assist colleagues with bike maintenance knowledge.

We will be undertaking a Surface Access Plan which will assess opportunities for enhanced active travel solutions into the Port from the main railway station.



Road

The Port of Southampton enjoys excellent road access with the main strategic network ensuring maximum connectivity for freight.

Dock Gate 4 entrance and Dock Gate 5 exit supports the Eastern Docks whilst Dock Gates 8, 10 and 20 support the Western Docks. Dock Gate 7 supports Town Quay and Dock Gate 9 is the junction at the former Leisure World site.

The main road access corridor to and from the Port consists of the A35, M271, M27, M3 and A34. These routes support both freight and passenger movements and connect the Port to the rest of the country. A secondary road route through the City of Southampton to the M3 is provided by the A33.

Southampton's Container Terminal operates a 'smart' vehicle booking system (VBS) to control the number of HGV movements booked to arrive at the terminal, thereby assisting in smoothing out HGV flows from peak hours to off-peak hours.

The VBS system allows excellent terminal productivity and efficiency levels as well as benefits to the surrounding road network.

The VBS system minimises congestion on the City's roads; reduces the number of queuing lorries thereby minimising emissions to air.

The container terminal also has a new truck park, complete with a cafe and shower facilities which allows drivers to park within the Port should they arrive early for their allocated slot and crucially, allow a safe and secure area for drivers to take their rest breaks.

Waterside Sites

Solent Gateway, Marchwood and Eling Industrial Parks are connected to the A326, A35 and the M271 via the local highway network of Normandy Way, Bury Road and Jacobs Gutter Lane.



Traffic Data Availability

We have recently installed a network of monitors across all our Dock Gates and access points which allows traffic movements to be captured and analysed per vehicle type and time of day. Active travel movements are also recorded within the data.

The average number of two way vehicle movements per day for the main Port is around 17,500 with flows dominated by cruise activity.

For HGVs, around 85% of activity is focused through the Dock Gate 20 to the container terminal with an average of 1,700 HGV movements per weekday.

Marchwood Industrial Park supports circa 550 LGV movements per weekday and Solent Gateway's approved traffic capability is 685 two way HGV movements per day.

The busiest time for freight activity is the early morning and afternoon outside of the main commuter travel times.

For cruise activity, the average two way movements per day total around 18,000 movements for a 5 ship day with active travel contributing to around 10% of total movements.

Future Transport Needs

Freight cargos generally access the Port outside the main commuter times.

For future developments accessing the main Port, although it is predicted there will be an overall increase in future freight volumes, the existing network is considered to be suitable for HGV access supporting the container, bulks and automotive sectors.

Some minor improvements could be implemented at the traffic signals at Millbrook Roundabout, Southampton, to prioritise hourly traffic flows. We are already working with Southampton City Council to assess the opportunities.

We recognise that cruise related traffic can result in congestion on the main routes into Southampton particularly on Fridays and the weekends in combination with Isle of Wight ferry, West Quay retail and Southampton Football Club traffic flows.

For cruise traffic, there are three important factors that influence traffic volumes:

- On-site valet parking (which slows down the overall volume of vehicles able to access the Port).
- Taxi and friends & family drop off trips (which results in two trips per vehicle at the busiest times of day).
- A shortage of dedicated self park facilities (due to the constraints of the overall port capacity).

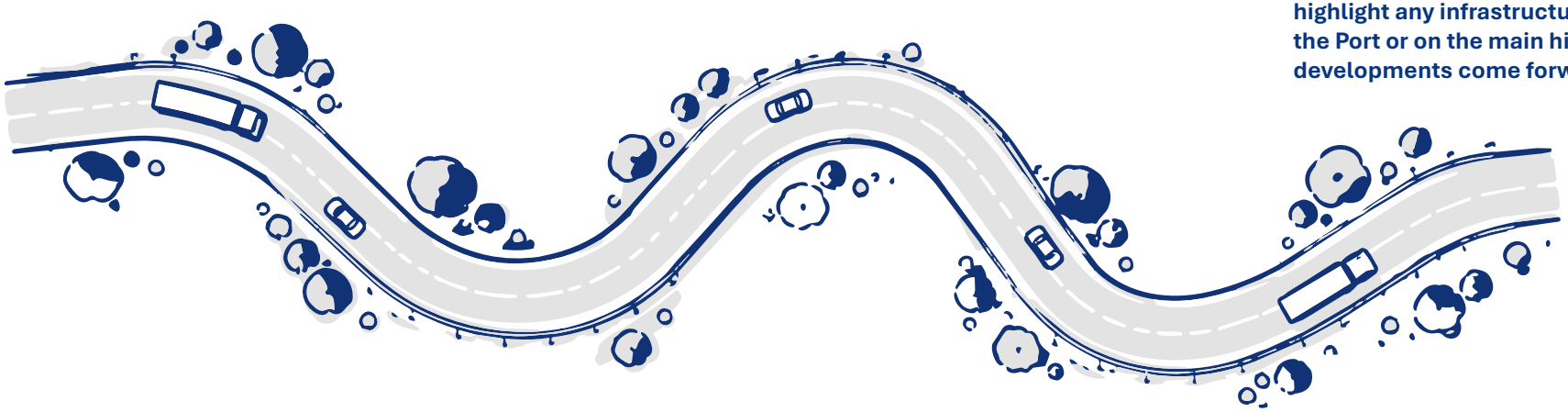
New cruise terminals located within the Western Docks could remove the need for some volumes to travel beyond Town Quay and we are working with stakeholders to improve active travel from Southampton Central railway station to cruise terminals - less than 700m from two of the existing terminals.

The provision of additional on-site dedicated parking – as is seen in other global cruise ports – will reduce the number of two way movements overall. Active travel wayfinding studies to highlight accessibility to the Port are currently underway.

The ability to use Millbrook Roundabout and Dock Gate 20 to access these potential developments would also remove traffic volumes from the city centre roads.

The methodology used to calculate cruise traffic activity is linked to the cabin capacity of individual vessels. Cruise traffic activity on a typical day follows a uniform distribution across the duration of a vessel call, i.e. traffic volumes are prevalent outbound from Southampton in the morning as passengers disembark and travel home with inbound flows to the Port being prevalent from late morning until mid afternoon for embarking passengers.

We will be able to model distribution flows and highlight any infrastructure improvements within the Port or on the main highway network as these developments come forward.



Transport Strategy

In order to provide a port for the future we recognise that there may be improvements that can enhance local and regional roads.

We will develop a Surface Access Plan working with the local highways authorities to provide a future strategy for road access.

We will also continue to work with Network Rail to ensure we can maximise the amount of freight travelling via rail.

- **Freight Movements** – work with Southampton City Council to optimise traffic signals at Millbrook Roundabout to improve flows for all users and work with National Highways to assess Strategic Network enhancements.
- **Network Improvements** – work with National Highways to assess capacity requirements on the Strategic Road Network.
- **Cruise Traffic** – increasing the use of Dock Gate 20 at weekends for cruise traffic will minimise use of city centre roads.
- **Facilitate more on-site Cruise Parking** – improving the cruise parking offer within the Port to reduce two way movements of friends and family / taxi drop offs.
- **Active Travel Wayfinding** – undertake a study between Southampton Railway Station and the Port to benefit cruise and ferry passengers.
- **Rail** – engage with Network Rail on its Southampton Capacity Study and also with stakeholders to promote rail travel for both freight and cruise passengers.

Solent Gateway, Strategic Land Reserve and the A326

Permission granted by New Forest District Council for port operations at Solent Gateway incorporates a threshold of 685 two-way HGV movements per day.

We are able to monitor overall numbers, arrival and departure times using our vehicle monitoring system.

We believe that this permission is sufficient to provide for traffic volumes at Solent Gateway for the duration of this Plan.

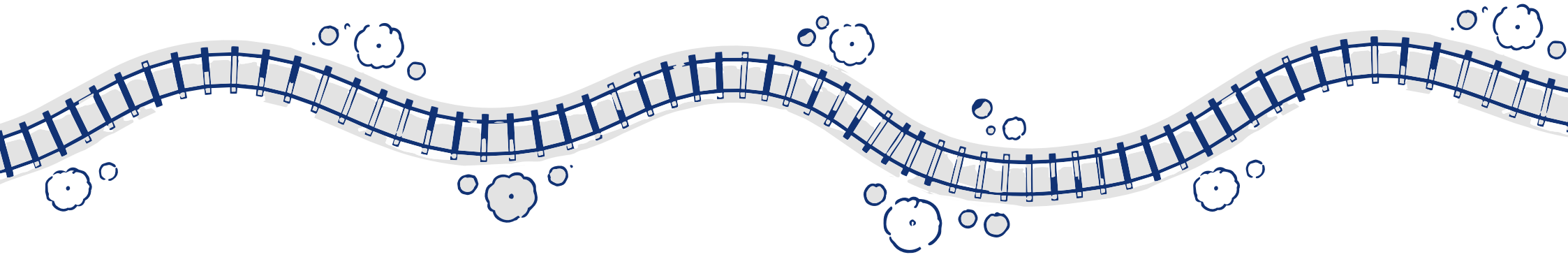
Hampshire County Council is currently progressing its plans for improvements to the A326 which serves the Waterside including the communities at Totton, Marchwood, Hythe and Dibden and Fawley.

Should the A326 highway improvements be granted planning permission and proceed, there is the opportunity for traffic from the existing Solent Gateway and any future development at the Strategic Land Reserve to directly access the main highway network and thus bypass the road network through Marchwood.

We will continue to engage with Hampshire County Council on a suitable access design and likely potential traffic volumes.

Delivery Timeframe

Sector	Expected Infrastructure Need	Indicative Development Timeframe	Considerations
Marine	Capital Dredging SGL Jetty Improvements	0-5 years 0-5 years	Connectivity Environment
Road Improvements	A326 Southampton A35 M271 Jn 3	5-10 years 5-10 years 5-10 years	Connectivity Environment
Rail Improvements	Southampton Central Station Operational Rail Improvements (Port and Solent Gateway) Basingstoke Loop	5-10 years 5-10 years 10+ years	Connectivity Environment




ASSOCIATED BRITISH PORTS
GATE
Nº 8
ABP | SOUTHAMPTON
SOUTHAMPTON MARATHON FESTIVAL

Objective 3

Creating Shared Value for Communities

We recognise the intrinsic relationship between the wider port and local communities.



Our Approach

Our ambition is not only to facilitate trade and support economic growth but also to create shared value for our communities.

By investing in local relationships, supporting education and skills development, encouraging community participation, and maintaining open dialogue, we seek to be a positive and valued contributor to the social, economic, and environmental wellbeing of the area.

Being good neighbours to surrounding communities is important to us.

Over 17,000 people in the region are employed within the Port and maritime sector. Our apprenticeship and graduate placement schemes in Southampton and across the wider ABP network of ports have won awards for their comprehensive nature.

We offer opportunities for school leavers, graduates and those looking for new challenges to be part of our team in operations, engineering, marine, property, IT and corporate business planning. Our promise to new joiners is that the Port will offer an exciting and varied work life in a safe, inclusive working environment with continued support and development.

We are always keen to promote the maritime sector and help local communities see the central role ports play in bringing goods to their doorsteps. From resident painters to schoolchildren, everybody is welcome at our Port and we regularly host many different groups on port visits.

We also support many community events and initiatives, including sponsorship of the Southampton Marathon, which sees tens of thousands of runners taking part to raise money for a multitude of charities.

We are proud to promote local biodiversity and protect wildlife in and around our ports and coastal communities. We organise regular beach cleans and in 2023 we supported a project to plant 21,000 trees across UK regions, in partnership with Trees for Cities.



Our Approach

As a long-standing neighbour of the local area, we are committed to building positive and lasting relationships with the communities in which we operate.

Every year ABP Southampton is proud to sponsor the Southampton Marathon events, enabling thousands of runners to come together and raise money for good causes. The Port is also heavily engaged in supporting a range of other charities. Its Charity of the Year is Abby's Heroes who support children and young adults with cancer and their families.

Recognising our role as a neighbour, our aim is to engage openly and proactively with residents, businesses, community groups, educational institutions, and local authorities.

We regularly undertake community liaison meetings to provide updates on port operations, development proposals, environmental performance, and future plans. We also engage in educational partnerships with schools, colleges, and universities to promote awareness of maritime industries, career opportunities, and environmental stewardship.

The Port Consultative Committee, chaired by the Port Director, comprises elected Members from the local community, Officers from the local authorities and key business leaders representing key port-related business sectors within the Port. The purpose of the Committee is to facilitate two way dialogue so that we can ensure that we work together to achieve a forward thinking, modern, Port of Southampton.

The Port Consultative Committee's role is to:

- Act as a key mechanism for sharing information on port operations, future plans and performance.
- Provide a forum for stakeholders to raise issues, concerns and opportunities.
- Support coordination with local planning authorities and alignment with wider regional strategies.

We engage regularly with our local Members of Parliament, the elected Members of the local authorities and parish councils to update on the Port.

We also facilitate Port open days and guided visits, allowing groups to gain a greater understanding of port activities and their contribution to the regional economy.

We support local events, charities, and community projects through sponsorship, volunteering, and in-kind assistance. We facilitate marine recreational sports and support the Southampton Half Marathon and 10K.

Through meaningful engagement and partnership working, our aim is to maximise local benefits, and ensure that future development is achieved in a manner that is responsible, inclusive, and responsive to community needs.



Our Approach

Mulberry Harbour Whale Bridge

In 2026 we unveiled our major preservation project the “Whale Bridge” at Solent Gateway, marking the completion of a project that has safeguarded a rare surviving piece of Britain’s D-Day heritage for future generations.

Developed as part of the Mulberry Harbour system that supported Operation Overlord and the liberation of France in 1944, the structure is believed to have been assembled in Marchwood more than 80 years ago and now stands as a lasting memorial to one of the Second World War’s most remarkable engineering achievements.

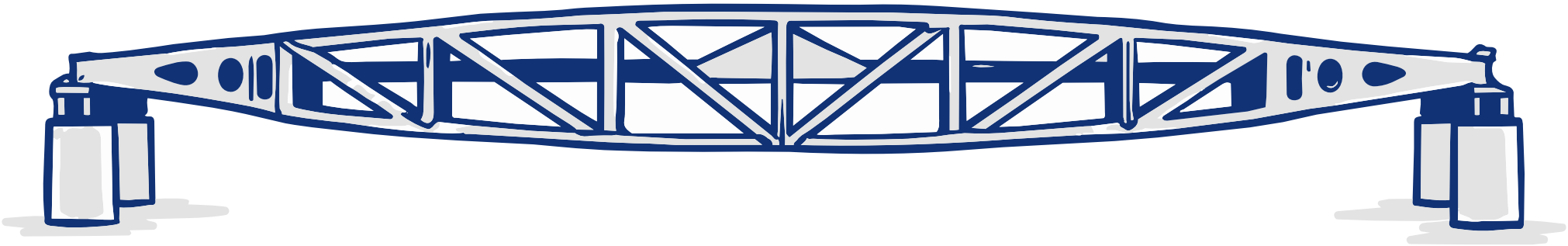
During the Normandy landings, these floating roadway sections enabled troops, vehicles and supplies to be transferred from ships to shore, playing a vital role in the success of the Allied invasion. Following the war, the bridge was installed at Southampton’s Town Quay, where it served as part of the Red Funnel ferry landing stage before spending decades partially submerged in the Solent.

Today, the Whale is one of only two known surviving examples in England that remain above water, making its preservation particularly significant. The Whale now stands as a permanent “gate guardian” at Solent Gateway in Marchwood, returning it to its historic roots and making it visible to the public for the first time.

The preservation project ensures that this rare survivor of the Mulberry Harbour programme can continue to tell the story of the people, places and engineering ingenuity that helped shape the success of D-Day.

Royal Pier

The derelict Royal Pier structure adjacent to Town Quay is recognised as an eyesore. We are committed to working with Southampton City Council and other regulators on the safe removal of the structure. With the Pier removed, an important step will have been delivered to facilitate the City Council’s regeneration of the area between Town Quay and the Central railway station. We are committed to working with City leaders as they develop their plans for the renaissance of this area.




ABP
ASSOCIATED
BRITISH PORTS
30

Objective 4

Leading the Energy Transition

Our goal is to decarbonise port operations, pursue alternative fuel options and support emerging clean energy sectors.



Energy Overview

We have over 5MW of solar generation in the Port - meaning that on some days we can operate wholly on renewable power.

Our new pilot boats with their specially designed hulls are resulting in a 25% saving on fuel and carbon.

Our electric vehicle fleet, introduced in 2018, and supplemented more recently by electric crew buses, have covered thousands of miles and reduced our vehicle emissions.

Our real time energy management system shows us energy usage across the Port allowing us to predict power demands.

Our aim for the future is to achieve Net Zero across all port operations by 2040

We are already experiencing a significant increase in demand for energy across all of our port operations and related supply chains – demand which, at present, cannot be supplied. The timing of additional energy capability – together with the associated costs – is a considerable challenge for the whole sector.

Energy and Carbon Management

We have implemented ISO 50001 compliant energy management system and we are committed to working with a range of organisations to increase the amount of clean energy to the Port required to support further decarbonisation activities of all port activities

Future focus includes:

- Seeking consent for onshore wind generation in the main Port estate.
- Achieving further reductions in energy and fuel consumption.
- Increasing use of renewable energy.
- Introducing battery storage technology to the Port.
- Installing further shore power connection points for vessels.

Building upon our extensive work, we are committed to:

- Supporting the UK Government's net zero greenhouse gas emissions target by 2050.
- Aligning with the DfT's Maritime Decarbonisation Strategy and furthering decarbonisation of transport modes.
- Ensuring development is undertaken in a manner consistent with the NPPF.

Our detailed decarbonisation strategy, Ready for Tomorrow, underpins this Masterplan, setting out pathways for reducing emissions across operations at all of our ABP ports. Ready for Tomorrow also sets out our ambitions for air quality, carbon, energy, water resources and Biodiversity Net Gain.

Our Approach

Decarbonisation and Resource Efficiency

Reducing carbon emissions and improving resource efficiency are central priorities. In order to achieve our goal of achieving Net Zero by 2040, additional energy supplies will be required to meet this key objective.

Our key initiatives include:

- Continued transition to renewable energy generation (solar PV and exploration of wind opportunities).
- Deployment of additional shore power to reduce vessel emissions at berth (where viable).
- Electrification of port transport (including marine craft).
- Exploration of battery storage and smart energy systems.
- Supporting uptake of alternative fuels (e.g. hydrogen, LNG, e-fuels).
- Implementation of energy efficiency measures supported by ISO 50001.
- Supporting modal shift to lower carbon transport.
- Working collaboratively with stakeholders.
- Delivering continuous improvement in energy saving measures.

Energy Generation and Storage

Renewable energy generation will play a crucial role in meeting the UK's future energy targets and Net Zero. Throughout the lifetime of the Masterplan, we are committed to the further decarbonisation of port and supply chain activities.

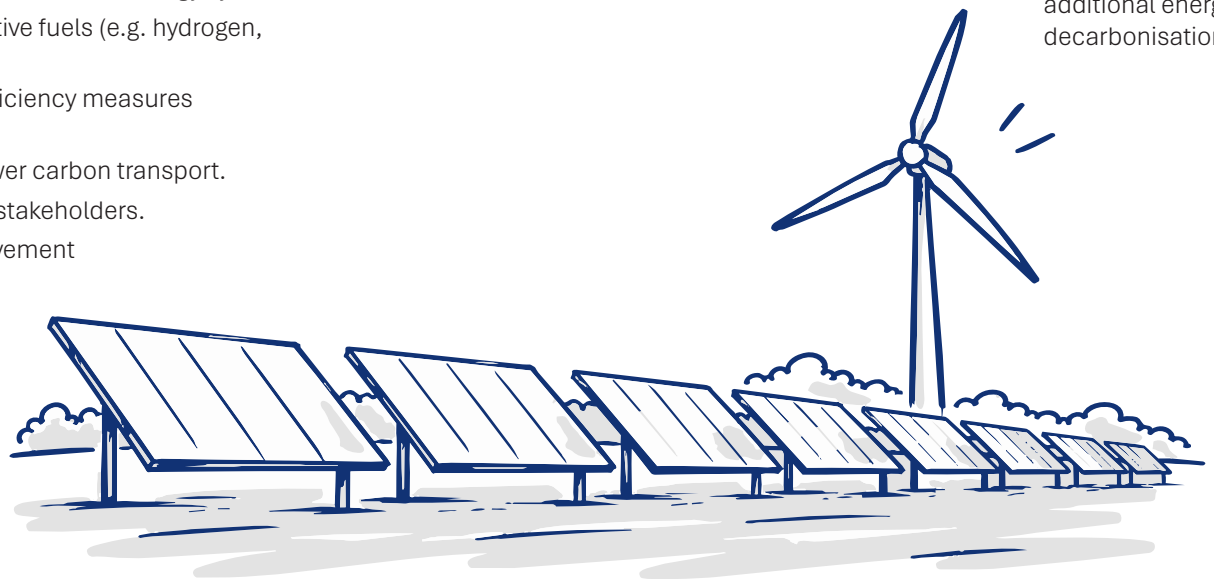
Currently approximately 20% of all port-wide electricity needs comes from on-site solar infrastructure.

On-shore wind could significantly increase our generation capability and therefore we are exploring the potential for on-site wind turbines with Southampton City Council and environmental regulators.

There is an emerging proposal to allocate land at Redbridge, within the Port estate, to supply both the Port and the City of Southampton with a battery storage operation – the aim of which is to provide additional power for periods of high demand.

An area of Marchwood Industrial Park already has planning permission to create a new battery storage facility but is unable to come online immediately due to wider network delays.

We will continue to investigate opportunities of supporting the energy sector through the development of battery facilities at the Port of Southampton which will allow additional energy to be provided to support the ongoing decarbonisation of activities.



Objective 5

Building Economic Growth

The Port of Southampton and its customers contribute £16.5 billion annually to local and national economies. Future investment over the lifetime of this Masterplan is estimated to be over £2 billion.



An Economic Powerhouse

The Port is a major deep-sea port with significant global and economic importance.

The Port plays an essential role in Keeping Britain Trading, providing a strategic hub and gateway to global markets for enterprises across southern and central England.

The Port supports:

- **17,800 jobs.**
- **£6.1 billion GVA.**
- **£65 billion of goods.**

The Port and its customers contribute significantly to both the local and national economies.

The Port is a major contributor to the local, regional and national economy, both in terms of providing direct employment and also in respect of businesses that indirectly rely on the Port's activities.

It is estimated that the Port creates in the order of 17,800 direct jobs within the region (WPI, 2026). With the Port at the hub of this supply chain, the range of employment, learning and skills opportunities is vast.



The combined direct, indirect and induced contribution of the Port in 2024 is estimated at £16.5 billion in turnover and £6.1 billion in GVA. Meanwhile aggregate jobs totalled 67,800 in 2024.

In 2024, the Port handled some £65 billion worth of trade with £28 billion worth of exports representing nearly 9% of all UK seaport exports by value.

Key regions for export are North America (44%), Asia and Oceania (34%) and the European Union (9%). The import markets in dominated by Asia and Oceania (53%) followed by North America (23%) and the European Union (9%) (WPI, 2026).

Investment will strengthen the competitiveness of local businesses and stimulate regeneration in surrounding communities, increase household incomes, and expand opportunities for employment skills development and apprenticeships contributing to economic resilience and productivity.

Our Approach

Development opportunities identified in this Masterplan exceed £2 billion.

Significant investment in port capital infrastructure can deliver substantial socio-economic benefits by acting as a catalyst for regional and national economic growth.

Major improvements to port facilities have the ability to support upgrades to transport connections, logistics hubs, and digital infrastructure creating thousands of direct construction jobs and supporting employment across supply chains, while also generating long-term operational and maintenance roles.

Our people make our Port the success it is today and as the world changes, the skills required to ensure goods continue to flow through our ports is evolving. We are proud to be Members of the Maritime and Transport Careers Programme – an initiative which aims to promote maritime careers to school children and adults.

Maritime Solent recognises that the Port is at the very heart of the regional maritime sector – a sector providing 50,000 direct jobs and over 158,000 of supported jobs recognising that the maritime sector is a national strategic asset central to leading and supporting global trade, defence and security, advanced manufacturing, maritime autonomy and maritime training and skills.



This outreach programme has reached thousands of people to share potential career pathways and employment opportunities.

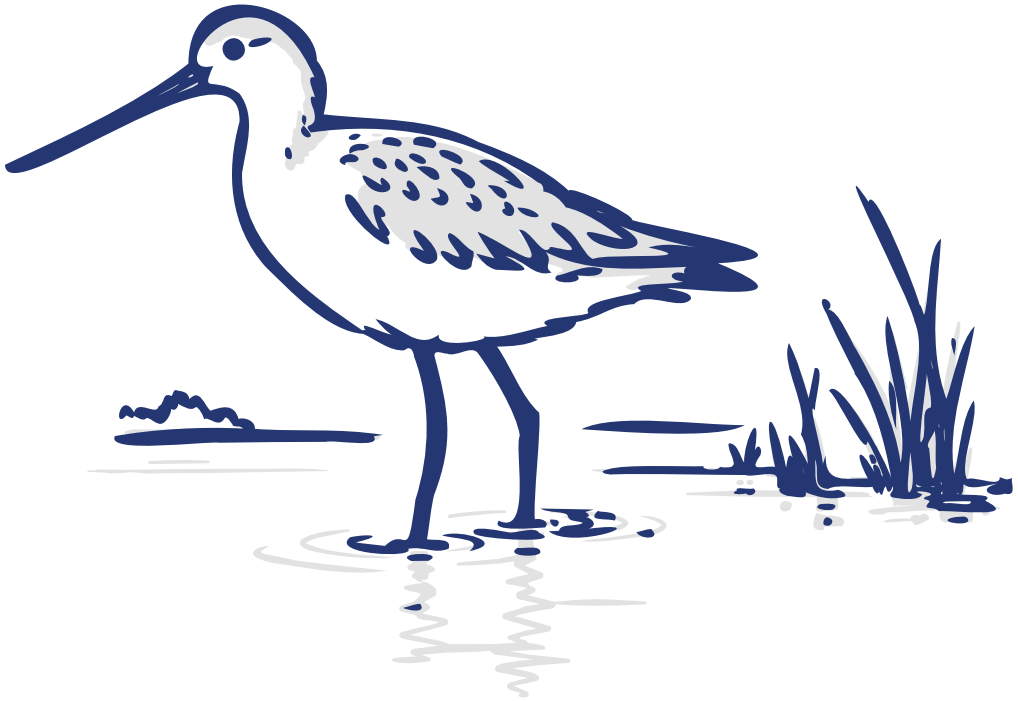
maritime + transport
careers programme


ASSOCIATED
BRITISH PORTS

Objective 6

Protecting and Enhancing the Environment

Our aim is to act as a responsible steward of the environment: to minimise our environmental footprint, respond to climate change and decarbonise operations.



Environmental Overview

We were the first port to introduce shore power at a large scale at two of our cruise terminals in 2021 enabling vessels to switch their engines off whilst in port.

Our Port wide air quality monitors demonstrate we are well below national objectives for emissions and particulates.

Visiting ships must use low emission fuel or exhaust cleaning systems to improve air quality.

Monitoring buoys constantly assess water quality to assist migratory fish.

Our aim is to minimise the Port's environmental footprint while supporting sustainable economic growth and delivering social value. We recognise that sustainable development is central to the long-term success of the Port.

Environmental Objectives

Our future approach focuses on:

- Minimising environmental impact of operations.
- Maximising efficient use of land and resources.
- Protecting and enhancing biodiversity.
- Working collaboratively with stakeholders.
- Delivering continuous improvement.

Environmental Management Framework

We operate an environmental management system supported by formal policies, procedures and governance structures. This includes compliance with ISO 14001 (Environmental Management) and ISO 50001 (Energy Management) standards.

Our current and future approach is structured around the following key themes:

Managing Environmental Risk

We systematically identify, assess and manage environmental risks associated with all activities, including:

- Environmental appraisals and impact assessments for new development.
- Operational risk assessments and audits for current activities.
- Emergency preparedness and response planning.
- Tested contingency plans for pollution incidents and extreme events.

Sustainable Construction and Development

We will ensure that all development:

- Minimises environmental impacts during construction and operation.
- Applies sustainable design principles and resource efficiency.
- Incorporates climate resilience and adaptation measures.
- Engages with regulators and stakeholders such as local authorities, the Environment Agency, Natural England and the Marine Management Organisation.

Our Approach

Natural Environment

The Port is located adjacent to internationally and nationally designated sites including:

- Ramsar sites.
- Special Protection Areas.
- Special Areas of Conservation.
- Sites of Special Scientific Interest.

These sites form part of the Natura 2000 network.

We will work with the main regulators and conservation groups to consider projects which can benefit the natural environment such as beneficial use of dredged materials.

Development proposals will comply with:

- Conservation of Habitats and Species Regulations 2017.
- National policy requirements for designated sites.
- Appropriate Assessments will be undertaken, where required, and development will only proceed where impacts can be avoided, mitigated or compensated.

We will explore the concept of habitat banking with regulators so that we can bring forward habitat creation schemes in advance of development.

Dredging

Dredging is essential for safe navigation for vessels and is undertaken in accordance with licences issued by the Marine Management Organisation (MMO).

We regularly survey the seabed and aim to minimise the amount of dredging undertaken. We carry out our dredging activities with carefully selected plant that does not overflow sediment within the harbour area. We also operate:

- Real-time water quality monitoring that records oxygen and sedimentation levels at all times.
- Sediment testing to ensure that dredged material is free from contaminants.



Climate Change Adaptation

The impacts of climate change are becoming of critical importance for businesses and individuals alike as we see an increase in warmer, drier summers as well as increases in storm intensity events.

We will need to adapt our operations to ensure that ports operations remain resilient to such events to ensure trade routes are maintained. Climate change resilience is embedded in our infrastructure planning, including:

- Design for extreme weather events.
- Heat resilience and energy efficiency.
- Long-term asset adaptability.
- Flood Risk and Coastal Change.

Flood risk is a key strategic issue for all of us due to surface water run off during heavy rainfall events, sea level rise, storm surge and wave overtopping and combined tidal and fluvial flooding.

We will continue to:

- Incorporate UK Climate Projections (UKCP) into future design work.
- Apply the sequential and exception tests where relevant to port operations.

Our Approach

Air Quality

We recognise local Air Quality Management Areas (AQMAs) and are committed to reducing emissions from port-related activities.

Ships arriving in Southampton are not permitted to use heavy fuel oil (HFO) and must instead use cleaner fuels or engine abatement systems to reduce their emissions.

Southampton was the first port to introduce large scale shore power at two of our cruise terminals enabling vessels to completely shut off their engines whilst alongside.

Future expansion of shore power will be subject to additional grid capability or the approval of large scale battery systems to provide additional power.

Existing operational management measures include:

- Promotion of rail freight and short sea shipping.
- Further development of shore power for vessels.
- Vehicle Booking Systems to reduce congestion.
- Electrification of port vehicle fleet.
- EV and e-HGV charging capability.
- On-site air quality monitoring and reporting.
- Dust management for bulk cargo handling.

We support:

- IMO emissions regulations, including sulphur limits.
- The DfT;s proposals to address emissions through the UK;s Emissions Trading Scheme.
- Adoption of cleaner fuels for vessels.
- Making air quality data available to local authorities and contributing to local Air Quality Action Plans.

Noise Management

We operate continuously day and night and recognise potential impacts on nearby communities.

We will continue to:

- Apply mitigation measures where practicable.
- Manage construction impacts through best practice and consultation.

Cultural Heritage

We recognise the historic significance of the Port and will:

- Protect designated heritage assets.
- Undertake archaeological assessments where required by the planning system.
- Work with Historic England and local authorities.

Landscape and Visual Impact

Development will be designed to:

- Integrate with the existing port landscape.
- Minimise visual impact on surrounding communities and the New Forest National Park.
- Include mitigation such as landscaping and screening where practicable.

Recreation and Marine Use

We balance commercial operations with recreational use of the Solent.

We will continue to:

- Maintain safe navigation through our Vessel Traffic Services operations.
- Support coordination via the Southampton Water Recreational Users Group.
- Facilitate major events, such as Cowes Week and local regattas, safely.

Join the conversation

We are inviting local communities, businesses and anyone who has an interest in the Port to take part in a conversation about its future.

Feedback can be provided online, by email or by attending one of our drop-in exhibitions. Your comments will help us understand the opportunities, challenges and priorities that matter most.

Public consultation on the Port Masterplan will run from **Wednesday 4th November** to **Wednesday 30th December 2026**.

Once the feedback period has ended, we will review all responses and publish a summary of what we heard, including how your feedback has helped shape the final Masterplan.

scan me

Find out more:

abports.co.uk/southampton2050

Email us: southampton2050@abports.co.uk



ASSOCIATED BRITISH PORTS

www.abports.co.uk

©2026 ABP