



Kent Coastal Network

Towards integration on the Kent Coast

This topic paper is part of a KCC coordinated project to develop an Integrated Coastal Action Plan for Kent. The aim is to generate wider discussion and it is accompanied by a consultation response form.

Title: Industry

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Introduction:

The marine industry in Kent is extraordinarily diverse and ranges from boat building and marine equipment manufacture to offshore renewables, fisheries, ports and ferries with four major ports including Dover, the busiest ferry port in Europe, with a ship movement every 30 minutes and over 2.3 million lorry movements a year carrying a large proportion of the UK's imports and exports and making a substantial contribution to the Kent economy.

The industry is extremely fragmented with more than 600 businesses and over 6,000 employees although 95% of businesses employ fewer than 5 people. It is estimated that the Kent Marine Industry contributes more than £557 million to the economy.

This topic paper:

- Provides an overview of the marine industry in Kent
- Identifies opportunities and barriers to development
- Is the first step to working with environmental agencies to create a balance between the environment and commercial development which is so essential to create jobs for the people of Kent
- Invites comment from all marine stakeholders about the issues affecting/constraining the marine industry in Kent.

The Industry:

Ports and harbours: Kent is truly the UK gateway to continental Europe with four major ports including the busiest ferry port in Europe.

It is generally accepted that the UK does not have sufficient port capacity for its future needs and Dover Harbour Board is embarking on a £440m development which will enable it to cope with the anticipated growth in freight traffic. The strategic importance of UK ports cannot be underestimated with over 90% of the UK's imports arriving by sea.

Smaller ports and harbours are constantly under threat from the pressure of developers looking for waterside sites to build housing. These assets are essential for the movement of freight around our shores which has the potential to reduce traffic congestion and the pollution it produces, quite apart

from the leisure facilities that are enabled through them. It is essential that we protect our marine assets since once they are lost to development they can never be reclaimed.

There is an opportunity to look at the ferry supply chain and identify opportunities which could benefit Kent based businesses such as engineering and local food and drink producers.

Cruise: Last year 144 cruise vessels called at Dover with over 273,000 passengers generating revenue in excess of £3.8 million. The long term growth of the cruise industry will create opportunities for SMEs to offer products and services to this sector and with the proposed regeneration of Dover Town there are opportunities to create a higher level of inbound tourism with its attendant impact on the local economy.

There is also an opportunity to identify other destinations for cruise liners in the attractive historical coastal towns of Kent.

Logistics & Recruitment: Every vessel at sea requires support on land to ensure smooth operations. Logistics companies manage bookings, arrange for food and equipment to be delivered to vessels in port and where necessary for engineers to standby in case they are needed.

Recruitment consultants ensure that the vessels are manned, often sponsoring cadets for training and booking flights to enable the crew to join their vessel.

Offshore renewable energy: The government is committed to supplying 10% of the UK's electricity from renewable resources by 2010 and half of this will come from offshore wind farms. At least seven licences have been granted in the Thames Estuary including the London Array which is potentially the largest offshore wind farm in the world.

Ports in Kent are ideally situated to assist in the construction and maintenance of these projects which could create a new opportunity for the local economy by maximising opportunities in the secondary supply chain, encouraging R&D as well as developing skills which could encourage inward investment and create new job opportunities.

Leisure: There are four large marinas in Kent, and numerous smaller ones that offer mooring spaces for leisure craft. With the addition of the permanent and leisure moorings provided by harbours in the area, it is estimated that Kent has in excess of 3,500 mooring and marina berths for permanent and visiting yachts.

Kent suffers from a lack of connectivity with other sailing areas such as the East Coast and Southampton and needs to investigate the feasibility of creating more destinations which will encourage inbound marine tourism which can make a substantial contribution to the local economy and create opportunities for SMEs and generate new jobs.

Fisheries: Kent has over 130 licensed fishing vessels which in 2007 employed around 200 fishermen in addition to shore-based logistics and support staff with the main netting fleet of under 10 metre boats being based at Ramsgate. Kent has a strong fishing tradition with a very diverse range of

both fin fish such as sole, bass, cod and thornback ray as well as shellfish such as cockles, scallops and oysters, being landed regularly. The fishing fleet is regulated by Kent and Essex Sea Fisheries Committee which is partly supported by contributions from Kent County Council. K&ESFC manage, regulate, develop and protect the fisheries within Kent with a view to balancing the needs of the fisheries and the sustainability of the marine environment.

Whilst the value of some species such as sole, bass and cockles is particularly high, the contribution to the local economy from the sale of fish is probably fairly modest with much of the catch being sold on the continent. However, due to the large infrastructure, the overall contribution of the fishing fleet to the local economy becomes more significant. The sea angling sector is also a large industry with over 20 charter boats based in Kent, more than 70 bait and tackle shops, and a conservative estimate places the number of individual anglers at over 10,000 individuals per year. This provides a significant contribution to the local economy through the sale of fishing equipment as well as the additional services that anglers will use whilst in Kent.

Harbours such as Whitstable have successfully improved their tourism offer by focusing on the fishing industry in the form of Whitstable oysters and the regeneration of the harbour. The opportunity for expansion and diversification within the industry in other locations and adding value through improved handling systems, local identity and tourism is significant.

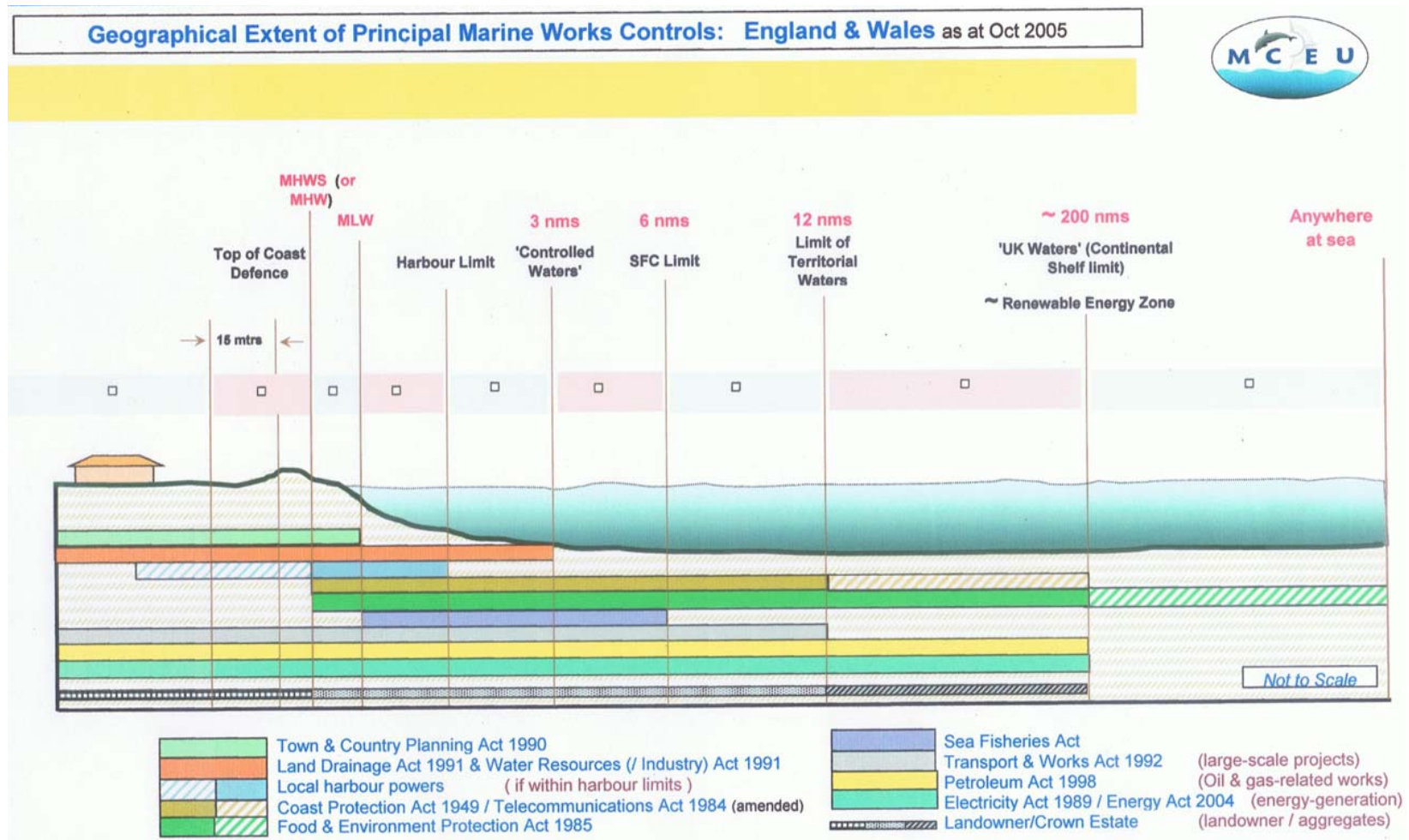
Manufacturing: Within the borders of Kent we have boat builders, marine electronics manufacturing and marine engineering companies whose products have an international reputation and are marketed worldwide.

Retail: Every harbour large or small incorporates a marine cluster which creates opportunities for bars, restaurants, riggers, yacht brokers, charter companies, training schools, chandleries, boatyards, sail makers, diesel engine repairs, electronics suppliers, specialist clothing, fishing gear, divers, upholsterers, marine plumbers and boat repairers. Not all of these are within the harbour though it is estimated that for every job created within a marina there are 12 jobs created outside.

Activity and distribution of resource: -

	Sheerness	Queenborough	Conyer	Teynham	Faversham	Whitstable	Herne Bay	Margate	Broadstairs	Ramsgate	Sandwich	Deal	Dover	Folkestone
Major Ports	✓					✓				✓			✓	
Harbour		✓					✓	✓	✓		✓			✓
Marina/ Moorings			✓	✓	✓	✓				✓			✓	
Cruise													✓	
Aggregates						✓				✓			✓	
Logistics	✓					✓				✓			✓	
Offshore Energy						✓				✓				
Leisure		✓		✓		✓		✓		✓		✓	✓	✓
Fishing						✓				✓			✓	✓
Engineering	✓	✓	✓	✓	✓	✓			✓	✓	✓		✓	✓
Retail	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

Regulators



Integration of Industry on the Kent Coast

	Biodiversity	Quality of the Water Environment	Historic Environment	Geology & Geomorphology	Industry	Recreation	Regeneration	Shoreline Management	Tourism
Major Ports	Red	Red	Red	Red	Green	Green	Green	Blue	Green
Harbour	Red	Green	Green	Red	Green	Green	Green	Blue	Green
Marina/Moorings	Red	Green	Green	Red	Green	Green	Green	Blue	Green
Cruise	Blue	Red	Blue	Red	Green	Green	Green	Blue	Green
Aggregates	Red	Red	Blue	Red	Green	Blue	Green	Red	Blue
Logistics	Blue	Blue	Blue	Blue	Green	Blue	Green	Blue	Blue
Offshore Energy	Red	Red	Blue	Blue	Green	Red	Green	Blue	Green
Leisure	Red	Red	Red	Blue	Green	Green	Green	Red	Green
Fishing	Red	Red	Blue	Red	Green	Green	Green	Red	Green
Engineering	Blue	Blue	Blue	Red	Green	Blue	Green	Blue	Blue
Retail	Blue	Blue	Blue	Blue	Green	Blue	Green	Blue	Green
Key:									
Possible Conflict:	Red		Positive Benefit:		Green		No Impact:		Blue

Policy directions for Industry on the Kent coast:

The following questions in relation to policy direction are proposed for discussion:

1. Could constraints on Kent's Maritime Industries use of land and sea be overcome, whilst still protecting the environment?

- Do land-use planning policies for maritime industries strike the right balance?
- How serious is the shortage of industrial development locations with access to water?
- Is more information on maritime industries required by the planning authorities?
- Is there a need for more research into how industry expansion can occur without detriment to the environment?
- What effects are conservation designations having on marine industry development?
- How can the planning process for marine developments be speeded up?

2. Is there a need for increased economic development assistance to the maritime sector in Kent?

- What is the potential for economic growth within the maritime industries?
- Is there a need to benchmark the marine industry in Kent to identify the opportunities for growth?
- What sort of public sector assistance is required?
 - What are the priorities?
- Is there a need for more coordinated marketing of Kent's marine sector?
- Does Kent need to be more connected to other marine leisure areas?
- Is there an opportunity to encourage more inbound marine tourism to the Kent Coast?
- Should Kent go it alone, or should a regional approach be considered?

3. Should more support be given to the implementation of environmental management initiatives within the industry?

- How can the implementation of the BMIF's code of practice be promoted throughout the maritime industries?
- How can further reductions in harmful discharges to the marine environment be encouraged?
- What should the target be for environmental standards in Kent's marinas?
- How can the economic potential of producing environmentally friendly products and services be promoted?

4. Should more cohesion and co-operation within the maritime industries sector be promoted?

- How can the role of the regional industry associations be supported?

- How significant are the potential economic benefits of technology and skills transfer between businesses?
- How can contacts and communication across the whole of the maritime business sector be encouraged?
- What national, European and world-wide contacts should be encouraged?

5. Does more need to be done to provide training in marine skills within Kent?

- What are the main skill gaps in Kent's marine workforce?
- Could more be done to link business with university and college education and training?
- What sort of links should be encouraged within the industry?

Credit – Thanks also to Dover Harbour Board and Kent and Essex Sea Fisheries Committee for their input into this paper.