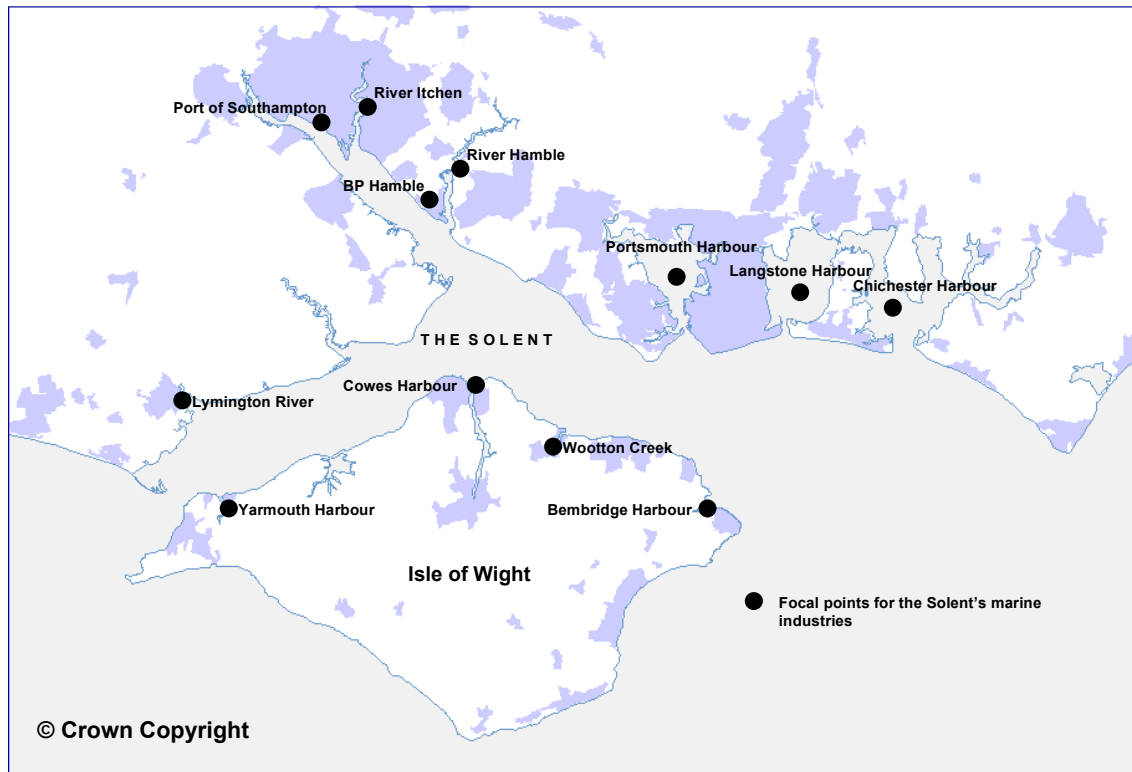


## MARINE INDUSTRIES

Long-term aim: 'to support development of the marine industries, and the promotion of the Solent as a centre of excellence for marine research and technology'.



### KEY FACTS:

- Employment generated by the marine leisure industry is estimated at over 5,000 full-time jobs.
- The marine leisure industry in the Solent has an estimated turnover of £240 million per year.

## The Position

The Solent's marine industry sector contains a wide diversity of businesses. In addition to the commercial ports, whose position is discussed elsewhere, the main categories are:

- industrial processing sites, requiring waterside locations for bulk shipping transport and/or the ready supply of seawater for use within processes (e.g. Esso, Exxon, Fawley Power Station);
- businesses requiring a waterside location and/or use of waterspace, to provide services for recreational and commercial craft, for example, marinas, boatyards, shipyards and sailing clubs;
- businesses providing products and services sustained principally by the local market, requiring a location near to the main customer base, but not necessarily on the coast (e.g. boat sales, chandlers, sailmakers);
- the maritime research and development sector;
- national manufacturers or service providers located in the Solent area by choice (e.g. Crewsaver), including defence industries.

As with all industry, the marine sector has land use requirements for development and infrastructure. The specific concerns with regard to the Solent are for those uses which are coast-dependent. Here the majority of activity is located within urban areas, particularly Southampton, Portsmouth, Cowes and the River Hamble. There are also clusters of marine industries around the smaller estuaries. The exceptional site is the major industrial complex at Fawley, containing the oil refinery, chemical works and power station.

Marine industries represent a very significant economic force within the Solent area, and have been identified by economic development interests as one of its major strengths. Hampshire Training and Enterprise Council (TEC) is promoting a new network - Solent Maritime - to bring together the different marine business interests in Hampshire and 'stimulate improved competitiveness and the growth of the maritime industry in and around the Solent region'. There are a range of other organisations with a remit to promote economic development within the marine industries, including Isle of Wight TEC, Southampton Regional Marketing Company and Hampshire County Council's Economic Development Office.

There are several industry associations for different sectors, with the largest being the Southern Marine Industries Association (a regional grouping affiliated to the British Marine Industries Federation). The recent opening of the Southampton Oceanography Centre has created an internationally acknowledged centre of excellence for marine science and technology.

The long term growth in marine industry activity has been a feature of the Solent through most of the century, although the patterns for individual sectors differ, and many have been checked by economic recession. The level of knowledge about future trends is not particularly good, and again the picture differs substantially between sectors.

The growth of the marine industry, coupled with the growth in ports activity and recreation, has created a recognised focus of excellence and expertise which provides an established base for economic development within the area. As noted above, this fact is recognised and initiatives are developing, although a clear lead, and demonstrated need within the industry will be required if they are to succeed. As yet no clear long-term basis for co-ordinating the industry has emerged. Whilst it is convenient to group 'marine industries' under one heading within the Strategic Guidance, in reality the diversity of businesses means that a sectoral, but co-ordinated approach may be required for economic development initiatives.

The development requirements of industry have led to a range of concerns about their impact on the environment. The town and country planning system provides the appropriate vehicle to balance the land-use demands of marine industries with other interests. From an environmental point of view, there is a need to protect landscape, wildlife and heritage, whereas industry highlights the risks of business stagnation through the application of restrictive policies.

Other environmental impacts of industry relate to the disposal of waste including discharges to air and water. These aspects are regulated by the Environment Agency, and discussed in the section on Environmental Quality.

## What do we need to do?

### 1. Deliver effective land-use planning for the marine industries

Many aspects of marine industry within the Solent are dependant on a coastal location. Because suitable sites are in short supply, the town and country planning system needs to make particular efforts to ensure that a range of sites remain available for marine industries. It also needs to ensure that significant sites with waterside access are safeguarded, in line with Government guidance in PPG 20.

**LEAD ROLE:** Local authorities.

The environmental constraints on further industrial development are generally well understood, and further significant loss or damage to important habitats will be avoided. Where existing marine businesses are located within protected areas and seek to expand, particular efforts will be needed to identify how development could be facilitated without causing a significant environmental impact.

**LEAD ROLE:** Local authorities, English Nature.

Improved information for local authorities and other policy makers on the requirements and trends within industry should be sought in order to fine-tune future policies. A better understanding of the socio-economic value of the industries, trends and the future land use demands through greater contact between the industry and planners would be helpful. Some existing marine businesses, particularly marinas and boatyards, have expressed concerns about the impact of restrictive planning policies on the ability of businesses to diversify and remain viable, and note the degradation of sites and buildings which results from lack of investment. It would be useful for more specific study to be undertaken of the extent to which planning policies are leading to this situation, and the extent to which it is an endemic feature of the industry.

**LEAD ROLE:** Local authorities, British Marine Industries Federation.

### 2. Deliver co-ordinated economic development

The Solent is an international centre of excellence for marine industrial activity. Economic development services seek to add value to the existing economic impact of the industries by promoting joint activity between enterprises with common concerns. Priorities include improved marketing, technology transfer, training and promotion. There is a need to clarify the types of economic development services required within the marine industries, and to ensure that these are delivered. Solent Maritime is an emerging network of marine industries which could provide a more cohesive forum, but it requires support to establish and consolidate its role.

The Solent is also an important location for the marine research and development sector. The area hosts internationally recognised organisations such as the Defence Evaluation and Research Agency, Fawley Aquatic Research Labs, ABP Research and Consultancy, Southampton Institute and the Southampton Oceanography Centre. Such organisations are a significant asset to the Solent and are potentially the foundation of new industries in the environmental, climatological and space sectors.

**LEAD ROLE:** Solent Maritime and the TECs.

There are a number of different public, and public-private sector organisations focussing on aspects of economic development for marine industries. These organisations will need to work effectively together to maximise the economic development efforts for the Solent, and avoid duplication. The private sector should seek to provide a greater lead to the future economic development priorities, and effective promotion and dissemination of the roles and activities of the various economic initiatives needs to be delivered.

**LEAD ROLE:** There is no organisation with a clear lead role to co-ordinate economic development activity, although Solent Maritime may be in a position to take this in the future.

### 3. Promote a wider range of environmental initiatives with the marine industries

The quality of the Solent environment is an economic asset for the marine industries, and its protection and enhancement is important to the continued development of the marine leisure industry in particular. It would be desirable to develop and promote a programme of environmental initiatives with the marine industries, including closer working between industry and environmental interests where possible. These programmes could take into account best practice promoted by industry

bodies, and there is particular scope to expand the British Marine Industries Federation's environment initiative to include the Solent, and to involve a wide range of businesses within it.

**LEAD ROLE:** British Marine Industries Federation, Environment Agency

Experience from elsewhere demonstrates that good environmental practice can have direct economic benefits to business through reducing costs, improving quality and the ability to meet increasing consumer demand for environmental quality assurance. There is also the potential to develop new technologies and products which may have an economic value in their own right. Active exploration of the environmental opportunities for Solent businesses should be promoted.



**SOLENT FORUM ACTION:** Work in this area could be taken on by a new topic group formed under the aegis of the Solent Forum however, existing bodies such as Solent Maritime or the British Marine Industries Federation might also be in a position to take a lead.

#### **KEY ORGANISATIONS: MARINE INDUSTRIES**

##### **Lead organisations**

Hampshire TEC  
 Isle of Wight TEC  
 Hampshire County Council  
 Southampton City Council  
 Portsmouth City Council  
 Isle of Wight Council  
 British Marine Industries Federation  
 Southern Marine Industries Association  
 Isle of Wight Marine Industries Association  
 Solent Maritime  
 Other Industry Groupings  
 Private Sector Companies

#### **Other key organisations**

Department of Trade and Industry  
 Defence Research Agency (Ministry of Defence)  
 New Forest District Council  
 Eastleigh Borough Council  
 Fareham Borough Council  
 Gosport Borough Council  
 Havant Borough Council  
 Chichester District Council  
 Associated British Ports  
 South Coast Marketing Company Ltd.  
 Isle of Wight Chamber of Commerce and Industry  
 Southampton Institute  
 Southampton Oceanography Centre  
 Portsmouth University  
 Farnborough College