

5 Conclusions

5.1 Addressing regional imbalances in provision of Intermodal Rail Freight Interchanges (IRFI)

- 5.1.1 The Williams-Shapps Plan for Rail 2021 noted the need to improve freight connectivity through interchanges and creating links with freeports, to help the rail industry support achieving net zero across the whole economy and transport system.
- 5.1.2 A small but growing number of Strategic Rail Freight Interchanges (SRFI) have been successfully developed over the last 30 years, mostly using private-sector funding (Wakefield and Mossend also involving local authorities). These have all achieved the objective of national policy as set out in the National Policy Statement for National Networks 2014 and the Rail Freight Strategy 2016, creating growth points for rail freight from a critical mass of distribution floorspace at strategic intersections between the road and rail networks. The floorspace also generates commercial value, which can address the significant upfront costs of the installing the road and rail network connections and interchange facilities. However, the SRFI model will be ultimately limited by the ability to achieve sufficient critical mass in locations geographically distinct from other SRFI or IRFI.
- 5.1.3 GBRTT considers that the wider development of intermodal rail freight requires a far broader geographical disposition of IRFI to complement the SRFI network, in areas where to date planning policy, land availability or distribution space demand/value would not support the developer-led SRFI model. Those regions where the level of I/SRFI provision and/or associated intermodal traffic falls below more established regions, and where initial market research confirms interest, focus on the North East, East of England, South East, South West and Wales.
- 5.1.4 Whilst the above analysis provides an initial focus for further discussion, this is not to suggest that the need for additional facilities falls solely within the above regions, as there will be further opportunities within other regions for additional infill developments (e.g. to suit specific customers such as Highland Spring at Blackford). This should also not be taken to suggest that existing I/SRFI across the network have no role or capacity to provide for additional growth. By contrast, the overall analysis serves to further underscore the scale of untapped potential for rail freight, and to support development of a pipeline of future IRFI to support existing facilities once exhausted and/or where no material provision is otherwise available.
- 5.1.5 Within the wider context of Network Rail identifying frustrated demand in the order of 50-60 trains per day, the assessment of intermodal rail services in more developed regions of the UK (eg the Midlands), suggests the scale of equivalent latent demand in less-developed regions could be in the following order of magnitude:
- 81 trains per day (the equivalent of 61% of existing intermodal services), equating to;
 - 1.6 million long-distance HGV loads removed from the highway network;
 - 8.4 billion net tonne km moved by rail, the equivalent of 126% of existing intermodal traffic levels;
 - 416,000 tonnes CO₂e of GHG saved per annum, compared to using road for the same journeys.
- 5.1.6 The above quantum of traffic is based on a high-level regional comparison between more and less developed regions, using the former to inform the latter, rather than an attempt to provide a robust forecast of potential out-turn. Nevertheless, it indicates the scale of the opportunity to expand the network of IRFI in these less developed regions and elsewhere to unlock further rail freight traffic and associated benefits.

- 5.1.7 Within the above target regions, an initial shortlist of 24 sites have been identified, with varying ownership and deliverability. Realising some of these and other sites that may exist or come forward will be required, to extend the reach of intermodal rail services into these largely undiscovered regions of Great Britain. This will require a cross-industry discussion about how best to deliver such facilities, as major private-sector funding may not be available to warrant the level of expenditure needed to connect sites to the main line, and/or create a sufficient scale and range of facilities needed to secure a robust, diverse customer base.
- 5.1.8 Beyond the issue of funding interchange development, there is also the wider issue of network capacity and capability. It will be important to ensure that suitable sites are not then constrained by lack of capacity on the surrounding rail and highway networks to enable them to function, or by insufficient loading gauge, train length and weight to achieve viable rail operations to serve them.