

**A Manston Airport Forecast, compiled by the Save Manston Airport association,  
from RiverOak Report Volume 3 by Dr. Dixon.  
2017-05-07**

The figures in this forecast for Manston Airport have not just been plucked from the air, but have been derived from over a year's worth of data collection and detailed analysis. See Volumes 1 & 2 for the details.

## **2.1 Air freight forecasting method**

### **Primary data collection**

2.1.6 "The collection and analysis of this data is described in Volume II of this series of reports and consisted of face-to-face interviews with representatives from key stakeholder groups including:

- Kent transport infrastructure
- Government and public sector
- Industry associations
- Freight forwarders and consolidators
- Local businesses who import/export
- Cargo airlines"

### **Secondary data**

2.1.8 "Secondary data was used to provide an overview of the industry, which allowed the primary data to be put into a global and national context ..... [and] to project growth from the short- and medium-term market data forecasts."

*"dedicated freight services offer shippers a combination of reliability, predictability, and control over timing and routing that is often superior to that of passenger operators. As a result, freighters are expected to continue carrying more than half of global air cargo traffic to satisfy the demanding requirements of that market."* (Boeing, 2014)

2.2.4 "In addition, the qualitative findings indicated several issues that present opportunities for Manston Airport. These include:

- The [lack of] sufficiency of slots at South East airports
- Bumping of freight from passenger aircraft
- Security issues particularly with oversized cargo
- Speed of turnaround and bottlenecks for air freight a particular concern due to, *"longer processing time because of security"* (ACI-NA, 2013, p. 5)
- Review of current regulatory controls on the charges and services Heathrow offers to airlines, due to expire at the end of 2018"

2.2.5 "Interviews undertaken as part of the qualitative research also indicated a number of potential markets for Manston Airport. These include:

- Perishables including fruit, vegetables, flowers, fish, and shellfish
- Oversized freight
- Formula One and luxury cars
- Live animals
- Time sensitive items such as aircraft parts and the oil and gas industry
- Humanitarian and military flights"

## 2.4 Passenger forecasting method

“Interviews were carried out to establish these potential markets for the airport, which include:

- Resumption of scheduled service twice daily to a hub airport
- A [low cost carrier] base for two aircraft at Manston rising to three
- The charter market resuming, stimulated by regional developments such as the Paramount theme park and Ebbsfleet Garden City development, which are expected to increase demand for both in- and outbound flights
- Flights from the US that tie up with cruise ships leaving from Dover”

It should be noted that the key next steps, in calculating the expected number of freight movements and tonnage forecasts, involve detailed considerations over the predicted plane types (ICAO design code) :

*Table 2 Freighter movements by year by ICAO design code*

*Table 3 Export tonnage by year and ICAO design code*

*Table 4 Import tonnage by year and ICAO design code*

And similarly for passenger forecasts by year and by ICAO design code :

*Table 5 Manston Airport 20-year passenger forecast*

A key point is that to enable these increased freight and passenger movements additional plane parking stands (currently 2) and other infrastructure upgrades are required :

*Table 6 Freight infrastructure requirements*- extracting just Years 5, 10, 20 :

Year	Freight stands	Warehouse space m <sup>2</sup>	Truck parking
Y5	13	19,305	29
Y10	14	27,400	35
Y20	19	64,906	57

*Table 7 Passenger infrastructure requirements*- extracting just Years 5, 10, 20 :

Year	Stands	Terminal capacity (pax per hour)			Car parking
		Departures	Arrivals	Landside	
Y5	3	171	43	85	1,108
Y10	3	171	43	85	1,574
Y20	4	171	43	85	2,271

The key forecast figures, to be carried over into the detailed jobs calculations in Volume 4, are as follows :

*Table 1 Summary 20 year freight and passenger forecast* - extracting just Years 5, 10, 20 :

Year	Freight moves	Pax moves	Total moves	Inbound tonnage	Outbound tonnage	Total tonnage	Passenger numbers
Y5	9,936	5,064	15,000	81,455	92,286	173,741	686,672
Y10	11,600	6,754	18,354	102,609	109,742	212,351	975,591
Y20	17,171	9,298	26,469	171,949	168,809	340,758	1,407,753