TECHNICAL NOTE

TRANSPORT AND THE ECONOMY

PRODUCT 4 – FREIGHT AND GROWTH IN THE EAST MIDLANDS

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EXECUTIVE SUMMARY

Introduction

The East Midlands is one of the UK's most important freight regions, owing to its central location, strong strategic road and rail connectivity, nationally significant logistics activity, and the presence of East Midlands Airport (EMA) as a major air cargo hub. Freight in the region already plays a critical economic role and is expected to become even more important as demand grows, particularly in intermodal logistics, construction materials, and air cargo.

There is a clear policy direction in the UK to decarbonise freight and enable mode shift to rail when and where it is feasible. There is also an understanding that the different modes of freight do not currently work together well enough, and there is an opportunity to enhance end-to-end freight journeys through technology, planning and infrastructure investment.

Demand for freight has undergone significant recent change, influenced by economic, industrial and societal change, such as the decline of coal and other bulk commodities, the rise of internet shopping, creating more time-sensitive flows and more variable demand, and the drive towards net-zero. This change has affected, and will continue to affect, the East Midlands in its central role in the UK multi-modal freight network.

Freight in the region

The East Midlands sits at the intersection of key north-south and east-west rail freight routes and supports a mix of markets, most notably construction, marshalling/engineering, and intermodal. This reflects the presence in the region of large quarries, Toton Yard and the terminal at East Midlands Gateway. Freight services are predominantly internal or linked to neighbouring regions, such as the East of England, West Midlands, and Yorkshire and the Humber. Rail freight passing through the region is dominated by intermodal traffic, especially flows to and from Felixstowe. This reinforces the East Midlands' role as a strategic bridge between ports, inland terminals, and national distribution centres.

Road freight is dominated by internal movements (around 82% of all freight flows), with flows linked to external regions led by those to and from the West Midlands. Trips originating in the region are highest in Derby, Leicester, Lincoln, North West Leicestershire, Northampton and Nottingham, which are all key economic hubs and near freight termini. Road freight flows on key corridors are skewed towards the beginning and middle of the day, with flows in the evening peak period only around two-thirds that of the morning peak.

Air freight is another defining strength of the region. EMA is one of the UK's most critical air cargo hubs and the UK's largest airport for dedicated air freighters, contributing £2.6bn in GVA to the UK economy in 2023. The evidence shows that EMA has consistently outperformed the national average for freight growth since 2018 and handles around one fifth of all UK air freight. It also handles more cargo than all non-London airports combined. Its role as a cargo-focused airport, with extensive night operations and major operators including DHL, UPS and FedEx, gives the East Midlands a unique position in national and international logistics.

Waterborne freight at ports in the region has seen an overall decline over the last ten years, reducing at East Midlands ports by nearly a third since 2015. The River Trent port is the most used in the region by tonnage, followed by Boston and Sutton Bridge. The cargo moved by water in the region is predominantly made up of iron, steel and dry bulk products.

Priorities

The East Midlands is well placed to strengthen its role in UK freight because of its central location and strong road, rail and air links. While road haulage remains efficient and dominant, it is not always the most sustainable use of limited road space, and air freight serves only niche, high-value markets. Rail offers a more sustainable option for bulk and long-distance freight, especially construction materials and port-related intermodal traffic, but it currently serves only selected markets.

To expand, rail needs to become more competitive with road by improving speed, reliability, terminal coverage and gauge clearance. Capacity constraints, mixed passenger-freight routes, limited signalling sections and incomplete electrification all reduce efficiency. More powerful locomotives and upgraded infrastructure could support longer, heavier and faster trains. Better performance would also open opportunities to expand into time-sensitive goods, parcel traffic and domestic intermodal flows from ports into the region. Addressing these issues would unlock suppressed demand and strengthen the East Midlands as a rail freight hub.

Future development

The opportunities identified above highlight infrastructure constraints that investment could unlock, and would also be complementary to parallel passenger flow opportunities. Electrification would allow for reduced journey times and reduced impact on passenger services, and would also address gauge clearance issues at key points on the network at the same time.

This is consistent with the investment advocated by the industry. CILT in its Freight Electrification Map highlight a number of corridors and 'infill' sections of the network that should be prioritised for electrification, delivering both decarbonisation of rail flows and removing HGV trips from the road network.

This investment need is even more pressing when future growth in rail freight is considered, with a UK government commitment to increase net tonne kms by 75% by 2050, with the industry itself identifying opportunities to even exceed this target, driven amongst other things by government house-building targets and future growth in fuel transport and steel production. Achieving this growth would create even more pressure on a constrained network, making investment in electrification, gauge clearance and capacity even more pressing.

Furthermore, anticipated growth at EMA, potentially doubling its current operations by 2040, will generate further demand on both road and rail networks in the region. In terms of rail, a priority for the airport is, at least, to maintain freight capacity at the existing connections at East Midlands Gateway, Ratcliffe-on-Soar, and East Midlands Intermodal Park, and to improve capacity where necessary. Regarding road connections, EMA states that a priority for developing the airport and the nearby Freeport should be enhancing access from the A453 and M1 junction 21a.

Given the policy ambitions around decarbonisation, decongestion and better integration between modes, there is now more than ever before a case for greater investment in freight movements in addition to the long-recognised benefits of passenger service investment. Movement of markets towards online retail and the proliferation of parcel movements has seen a greater need to promote greater mode shift, through distribution hub capacity, rail network investment and re-imagining how parcels might be moved via rail.

1. INTRODUCTION

1.1.1 In order to understand the competing priorities of freight in the East Midlands, how freight currently operates across road, rail and air, and how future developments might impact these, SYSTRA has undertaken an evidence-based review of freight data and plans for the region.

1.1.2 This Technical Note sets out the findings of this review and the conclusions that can be drawn from it.

2. CONTEXT

2.1 Policy context

Future of freight: a long-term plan (Department for Transport, 2022)

2.1.1 This plan sets out a long-term vision for the UK freight sector, and was developed in response to the National Infrastructure Commission's 2019 report 'Better delivery; a challenge for freight'. Under five priority areas, it identifies the main challenges, objectives and actions that need to be taken. The plan set out the following vision:

> A freight and logistics sector that is cost-efficient, reliable, resilient, environmentally sustainable and valued by society.

2.1.2 A summary of the five priority areas and commitments under each are as follows:

- **A National Freight Network** – currently there is a lack of understanding of the freight network and its position as a cross-modal system. A national network will better support end-to-end freight journeys and maximise modal shift opportunities.
- **Transition to net zero** – delivering a cleaner and green freight system, and harnessing cross-modal efficiencies and synergies. A Freight Energy Forum will be established to explore zero carbon opportunities and cross-modal initiatives.
- **Planning** – there is a current disconnect between industry and local planning authorities that creates complexity and inefficiencies in bring forward schemes to benefit national freight and logistics. A review of Planning Practice Guidance, LTP guidance and other relevant policies, and a programme of engagement with local authorities are all included as actions to deliver.
- **People and skills** – in order to address immediate and future skills shortages that could undermine UK supply chains, government and industry will collaborate to improve the Transport Employment and Skills Taskforce and reform Freight and Logistics training that is offered.
- **Data and technology** – creating greater awareness in the sector of innovative solutions by creating a dedicated £7m cross-modal Freight Innovation Fund.

2.1.3 The plan identifies East Midlands Airport as one of the UK's most critical hubs for air cargo, including being the UK's largest airport for dedicated air freighters and 100% of its cargo being carried on cargo-only flights (as opposed to on passenger planes).

2.1.4 It also identifies the national significance of the logistics golden triangle in the region, including the Freeport. The Solent to the Midlands Freight Strategy is a collaboration project

to improve the efficiency of the corridor between Southampton and the distribution hubs in the region. Furthermore, the number of transport and storage businesses is growing fastest in the Midlands, alongside the East of England, and the Yorkshire and the Humber.

Rail freight growth target (Department for Transport, 2023)

2.1.5 This official policy paper outlines the UK government's strategic ambition to expand the rail freight sector by at least 75% by the year 2050. The initiative aims to bolster economic growth and environmental sustainability by shifting heavy goods transport from congested roads to more efficient rail networks.

2.1.6 Key benefits of achieving the target include significant carbon emission reductions and improved supply chain resilience across England, Scotland, and Wales. To achieve these targets, the government proposes investing in infrastructure, supporting technological innovation, and integrating freight needs into the heart of railway planning. It is intended to provide a framework for private sector investment and cross-industry collaboration to unlock the full potential of the nation's logistics network.

2.1.7 The plan includes the following key strategies:

- **Structural reform and strategic leadership** – including Great British Railways and the establishment of the Strategic Freight Unit.
- **Infrastructure investment and capacity enhancement** – investing in the rail network to increase freight capacity and reliability. Upgrades at Oxford station and along the Oxfordshire corridor aim to support the operation of additional freight services into and out of the Midlands in future years.
- **Financial incentives and support** – continuing to support the Modal Shift Revenue Grant (£20m per annum), and innovation funding to support increased train speeds and load limits.
- **Planning and international cooperation** – reviewing the National Networks National Policy Statement to ensure the planning system supports the development of strategic rail freight interchanges and allocates sufficient land for logistics.
- **Industry collaboration** – establishing a Rail Freight Growth working group, and publishing quarterly performance figures via the Office for Rail and Road.

Rail Freight Strategy: Moving Britain Ahead (Department for Transport, 2016)

2.1.8 Published in 2016, the Rail Freight Strategy aims to provide a stable policy framework that enables the industry to grow and realise its full economic and environmental potential. The strategy is built on four priority areas:

- **Innovation and skills** – this includes technological innovation, such as digital signalling and better data usage for aggregating loads, and developing apprenticeships and development programmes.
- **Network capacity** – better use of existing infrastructure through utilisation of the Strategic Freight Network Fund, improved timetabling to remove underutilised paths and identify strategic capacity, reviewing the passenger franchising process to ensure future freight demand is considered.
- **Track access charging** – supporting a transparent charging framework that ensures operators understand where costs are incurred on the network.

- **Telling the story of rail freight** – establishing a dedicated Freight Communications Group under the Rail Delivery Group, and promoting better collaboration throughout the industry and government on the benefits of rail freight.

2.1.9 The Strategy makes reference to Dove Holes Quarry in Derbyshire and the use of rail to transport aggregates to the North West. Each service removes up to 150 HGVs per train from the road network in the environmentally sensitive Peak District and produces 76% less CO_2 than road transport for the same journey.

Our freight routemap for the Midlands (Midlands Connect, 2022)

2.1.10 This freight route map sets out the aspirations for the development of the freight sector across the Midlands. The emphasis of the route map is on the development of rail freight as this represents the most sustainable approach to developing the sector. The route map has five objectives:

1. **Economy:** Exploit the natural advantages of the region's location and ensure freight is able to support and grow the Midlands and wider economy.
2. **Rail capacity:** Ensure rail capacity, particularly by HS2, benefits rail freight so that the network is able to accommodate a growth in freight moved by rail.
3. **Mode shift:** Where practicable, encourage modal shift to more sustainable modes.
4. **Decarbonisation:** Decarbonise freight movements with a particular focus on road freight, contributing to the net zero carbon target.
5. **Integration:** Enhance integration between freight modes to provide a more resilient and effective supply chain.

2.1.11 The objectives address a blend of themes covering transport directly such as rail capacity and mode shift, decarbonisation, and the effect on the economy, with the Midlands in general, and the East Midlands in particular, being well-located to make freight a feature of the economy.

2.2 Freight and freight logistics

2.2.1 As noted in 'Understanding the UK Freight Transport System'[1], freight transport is needed "because goods available at one geographical location are required at another location for processing, sorting or consumption." The demand therefore comes from companies, rather than directly from consumers, although these companies are theoretically attempting to respond to and meet consumer demand sufficiently.

2.2.2 Freight is the physical carriage of goods between an origin and destination for commercial reasons. Logistics is the broader discipline of designing and managing integrated supply chains, including purchasing, manufacturing, storage, and transport. Together, freight logistics refers to the strategic planning and oversight of these operations to ensure goods reach their destination in a cost-effective, sustainable, and timely manner. It includes inbound logistics (supplying materials), outbound logistics (delivering to end users), and reverse logistics (managing returns and recycling).

[1] Understanding the UK Freight Transport System. Government Office for Science, 2019.

2.2.3 Demand for freight and logistics has undergone significant change in recent years, influenced, amongst other things, by the following:

- The decline of bulk commodities, such as coal, has shifted demand towards intermodal containers and construction materials. This requires investment in freight interchanges and rail gauge enhancements to accommodate larger units. In the construction industry rail freight is the most competitive mode due to the long distances it travels and the volume of material a single train can carry over a HGV. Demand for the movement of construction materials can often be heavily driven by national infrastructure or development projects.
- The rise of internet shopping has increased demand for 'last mile' deliveries, creating greater strain on urban and suburban road networks, and requiring fulfilment and consolidation centres on the edge of towns serviced by delivery vehicles. Online retail also generates a unique demand for 'reverse logistics' to handle high volumes of customer returns and recycling. Furthermore, international e-commerce relies heavily on air freight for speed and convenience.
- The decarbonisation agenda is generating new demand from freight for zero carbon energy, including HGV charging networks and hydrogen refuelling, and a renewed push towards mode shift of freight to rail.
- The continued expansion of global trade requires sea ports to invest in infrastructure to accommodate larger vessels and handle larger containers at higher volumes.
- Supermarkets rely on high frequency and the movement of time sensitive, perishable goods, meaning food is traditionally reliant on road transport utilising regional distribution centres with short dwell times for goods.

2.2.4 The East Midlands serves as a focal point for many of these industries and movements, including a number of distribution centres within the 'golden triangle', East Midlands Airport for large volumes of air freight, and a large volume of aggregate flows from quarries in Derbyshire.

3. FREIGHT IN THE EAST MIDLANDS

3.1 Introduction

3.1.1 Situated at the centre of the UK's rail and road networks, combining strategic geography with a diverse mix of flows – intermodal, aggregates, bulk, and specialist traffic – the East Midlands is a crucial site within the UK's freight industry, both domestically and internationally. This section will focus on the modes of road, rail and air freight, providing an insight into the key statistics and flows associated with each mode of travel, and core hubs within the region which facilitate these flows.

3.2 Freight jobs in the region

3.2.1 Figure 1 presents the distribution of freight jobs across the East Midlands area. The jobs included are across a number of different freight sectors, including:

- Rail freight
- Road freight
- Sea and coastal water freight
- Inland water freight
- Air freight (including operation of terminals)

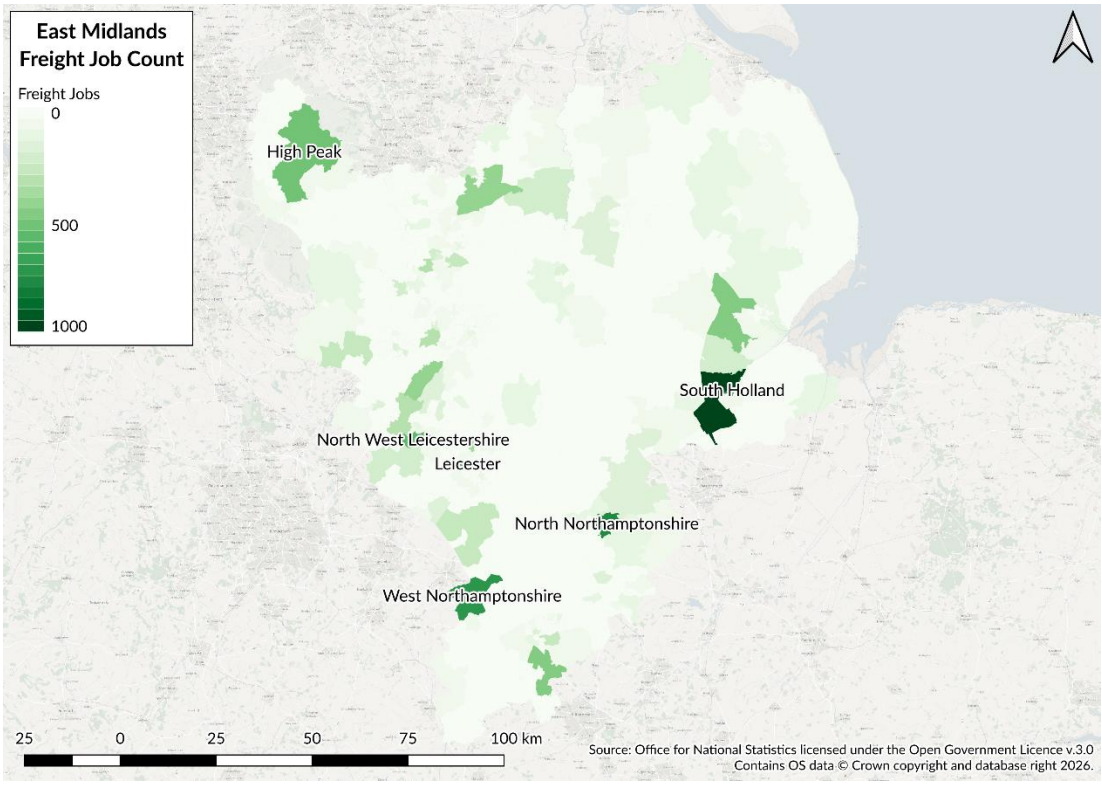


Figure 1 Distribution of freight jobs in the East Midlands (2021 Census)

3.2.2 There is a relatively uneven distribution of freight jobs across the region, with notable key hubs across the East Midlands where significant numbers of freight traffic depart and arrive from. Within High Peak, **Peak Forest** serves as a key site in the North West of the region. At

Tunstead, a major quarry in the area, crushed stone aggregates are distributed to terminals across the UK, with the site accessible by rail via the Hope Valley Line. Additionally, this is also a key site for road haulage, with materials distributed to and from the area in the form of heavy goods vehicles (HGVs). The A6 is a vital artery facilitating movements from this area to other parts of the region, along with freight travelling to the North West.

3.2.3 Within North West Leicestershire, **East Midlands Gateway Terminal** plays a key role in facilitating intermodal freight movements to and from East Midlands Airport, where freight is loaded/offloaded onto cargo planes. Additionally, **Toton Yard** is an important site, supporting freight stabling and engineering, and is strategically situated in the middle of the region.

3.2.4 To the south west of the region, **Daventry International Rail Freight Terminal** (DIRFT) is an extensive rail freight terminal handling shipping containers from major ports, such as Southampton, Felixstowe, London Gateway and the Humber. Intermodal containers dominate the freight profile, at DIRFT, thus highlighting not only the expanse, but also the range of freight cargo which operates in and out of the East Midlands area.

3.2.5 **South Holland** in the south-east of the region is dominated by road freight services, with roads such as the A16/A17 connecting to the A52, a crucial east-west freight artery, and the A1, a primary north-south route for freight travelling through the East Midlands. This also links to the **Port of Boston**, which whilst handling significantly less freight than other major sea freight termini such as Felixstowe and London Gateway, is a crucial site facilitating the export of agricultural produce from the east of the region.

3.3 Volume of freight movements in and through the region

3.3.1 This section will summarise existing freight movements through the region, each broken down by road, rail and air, and covering:

- External to external movements e.g. freight passing through the East Midlands
- Internal movements e.g. internal to external, external to internal, and internal to internal flows

Road

3.3.2 The East Midlands sits at the core of the national road system, with the M1 spine, A1 eastern corridor, and trans-pennine links via the A50/A52 and A42/M42 enabling efficient north-south and east-west movements. This central position shortens trunk-haul distances to major conurbations, while proximity to key hubs such as East Midlands Airport, East Midlands Gateway (incorporating the Strategic Rail Freight Interchange), and clusters around Nottingham, Derby and Leicester support dense, time-reliable distribution. The network's interchanges and service areas host a critical mass of depots, cross-dock facilities (focusing on reducing handling and inventory dwell time) and maintenance operations that keep fleets moving. This section will highlight the key flows showing density of movements, direction of movements, and key origins and destinations of road freight traffic engaging with the East Midlands area.

Entry/exit points and key corridors

3.3.3 This section summarises the key entry and exit points in and out of the East Midlands region, and the key corridors through the region, that play a role in facilitating the movement of freight flows.

- **North to south spines:**
  - **M1:** The M1 is the East Midlands' principal north–south artery, running through the counties of Derbyshire, Nottinghamshire, and Leicestershire. It connects the region southwards to the M25 and Greater London, and northwards to South Yorkshire and beyond. Junctions around Nottingham, Derby and Leicester act as major entry and exit points for regional distribution and long-haul HGV flows.
  - **A1:** This corridor runs through the heart of the region, providing direct access north–south outside the M1, supporting flows between Yorkshire and the Humber and the North East, and the East and South East. Its proportion of HGV traffic is relatively high (20-25%) compared to the average trunk road (12%), and its location in the region means it is key in providing onward access to and from ports and agriculture distributors in Lincolnshire.
- **East to west trunk corridors –** several high-capacity A-roads provide critical east-west gateways used for external road freight travelling to other regions within the UK:
  - **A14 corridor:** The A14 links the East Midlands to the East of England ports and the A1, connecting to the M6 and M1 at junction 19 at Swinford.
  - **A50/A52 corridor:** The A50 (and sections of the A52) connect the M1 with the North West via the M6, acting as the main trans-pennine access for East Midlands–North West flows
  - **A46/A47 corridor:** The A46 provides a continuous link from the M1/M69 through Leicester towards the Lincolnshire area, with the A47 offering another east–west route toward the East of England
- **Additional strategic connecting roads:**
  - **A38:** Runs from the M1 near Derby south-west towards the M6, supporting East Midlands–West Midlands connectivity
  - **A6 and A42/M42:** Provide supplementary north–south and south-west links, including access toward the West Midlands and the M42/M6 corridors
  - **M69:** Links the M1 near Leicester to the M6 near Coventry, with onward connectivity to Birmingham and further south-west

3.3.4 It is notable that, given its large rural areas, freight vehicles in the region are often travelling on rural roads, particularly in Lincolnshire accessing key sites such as the Port of Boston and freight jobs hub in South Holland, and in the Peak District for quarry and construction materials sites. Rural roads, by their very nature, are less suitable in managing large flows of HGVs than motorways and the wider strategic road network:

- They are often single carriageway, and therefore less resilient to disruption.
- There are fewer alternative routes, further reducing disruption resilience.

- They often route directly through and negatively impact rural communities, with HGVs creating significantly more noise, vibrations, air pollution and safety hazards than most vehicles.
- They are more susceptible to the increased wear and tear that heavy vehicles impart, resulting in greater maintenance and repair costs for local authorities and greater disruption for all traffic.

Freight movements in the East Midlands

3.3.5 Data for road freight flows has been extracted from Midlands Connect's MiHAM SATURN model, with the flows representing the 2024 base year. Table 1 and Figure 2 highlight the other geographical regions within the UK where this freight is travelling to.

Table 1 Origin or destination location and volume of daily road freight (LGVs and HGVs) in the East Midlands

ORIGIN OR DESTINATION LOCATION	DAILY FLOWS
Internal (within the East Midlands)	335,005
West Midlands	27,569
East of England	14,043
Yorkshire and The Humber	12,993
South East	7,619
North West	5,854
London	1,697
South West	1,321
Wales	1,230
North East	1,056
Scotland	412

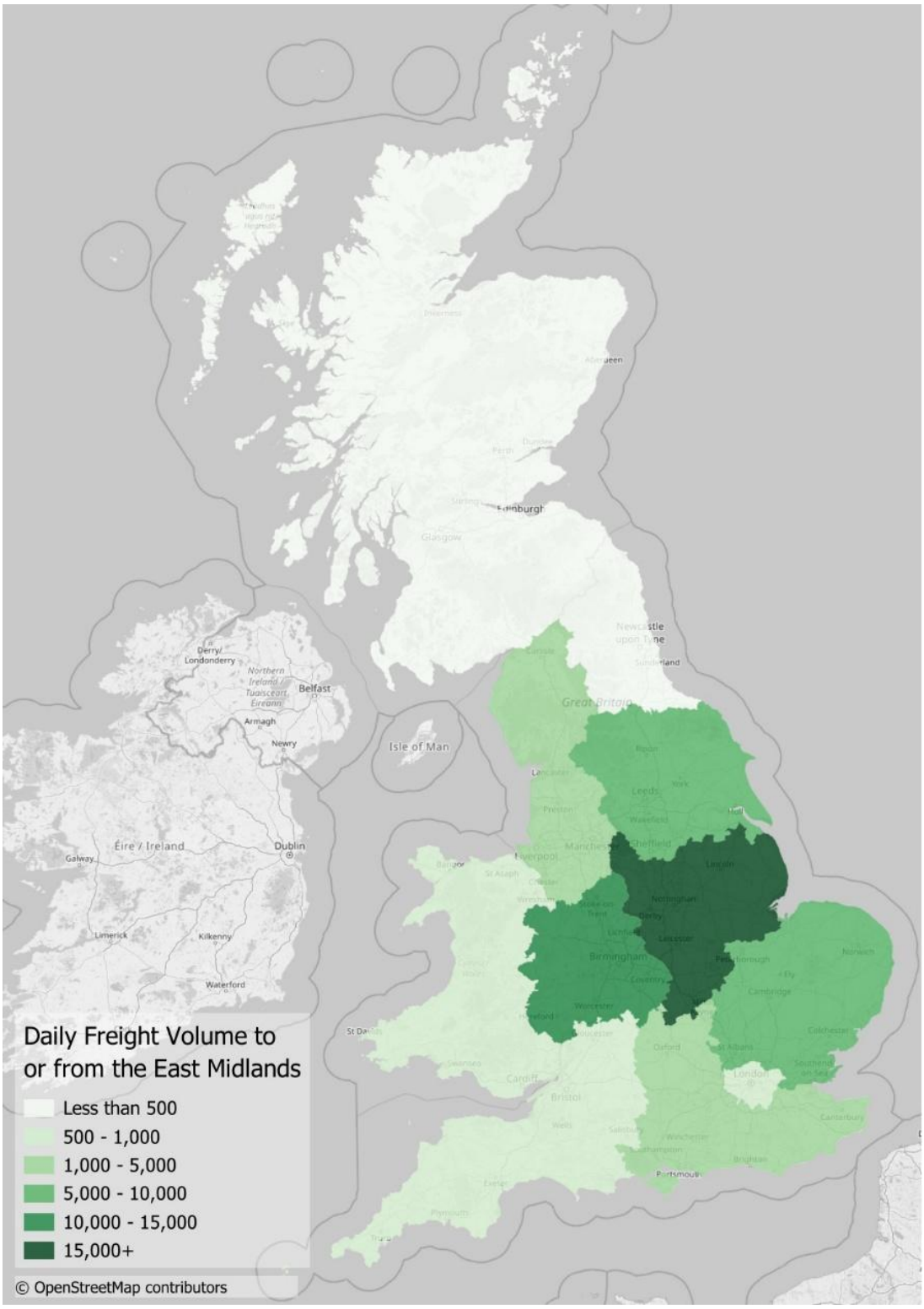


Figure 2 Location and volume of road freight (LGVs and HGVs) originating or terminating in the East Midlands

3.3.6 The greatest amount of road freight flows are internal within the region, both originating and terminating at locations in the East Midlands. Other than internal movements, the volume of freight is predominantly highest to neighbouring regions, led by the West Midlands, followed by the East of England and Yorkshire and the Humber. There is almost twice as much road freight traffic going to and from the West Midlands compared to the East of England and Yorkshire and the Humber. As might be expected from regions furthest away and with less developed strategic road networks, the lowest amount of freight volume terminates in Scotland from the East Midlands, followed by the North East and then Wales.

3.3.7 The flows of road freight terminating in the East Midlands follow a very similar trend to flows originating from the region. The highest flows are from the neighbouring regions of the West Midlands, East of England, and Yorkshire and the Humber. The lowest amount of road freight originates from Scotland.

3.3.8 Figure 3 presents the distribution of daily flows originating in the East Midlands with destinations outside the region by time of day and destination location. It demonstrates the dominance of flows to the West Midlands and East of England. The data also demonstrates that overall flows are lowest in the off-peak, and higher in the inter-peak compared to the evening peak. Flows during the evening peak are only around 64% of those compared to the morning peak.

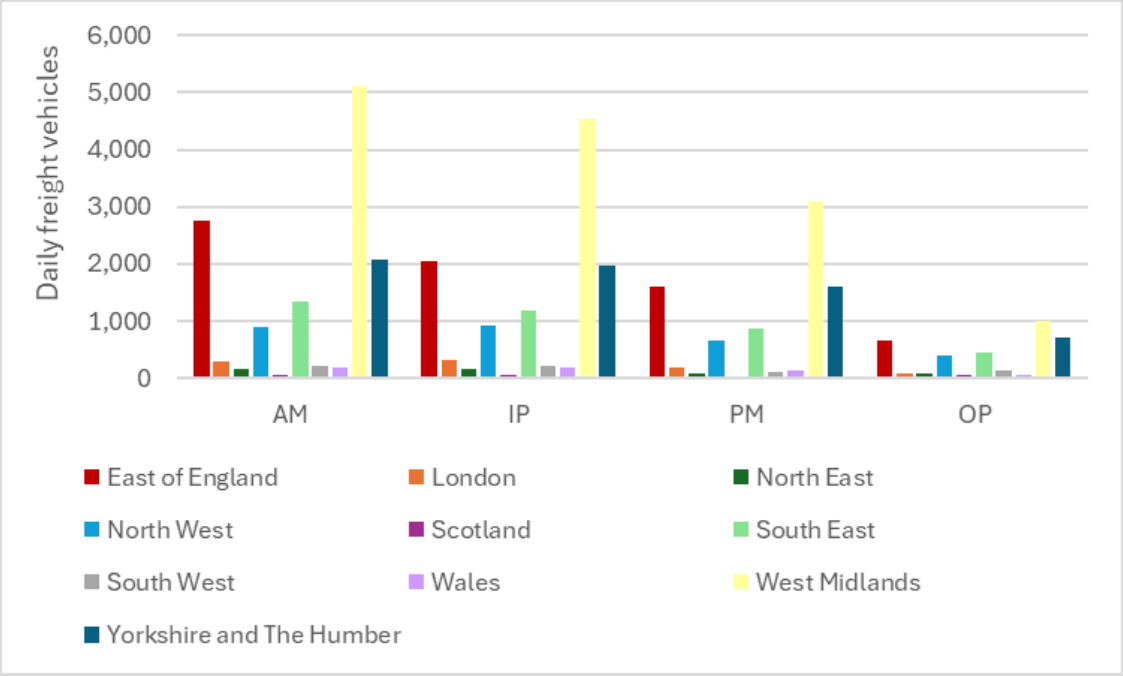


Figure 3 Time and location distribution of daily road freight flows originating in the East Midlands with destinations in other regions

3.3.9 Using DfT data to compare nationally, HGV and LGV counts in the region in 2024 represented 9% of all HGV/LGV traffic in Great Britain, totalling just under 7bn (Figure 4). This ranks the

region behind the South East, East, North West and South West as a proportion of national counts.

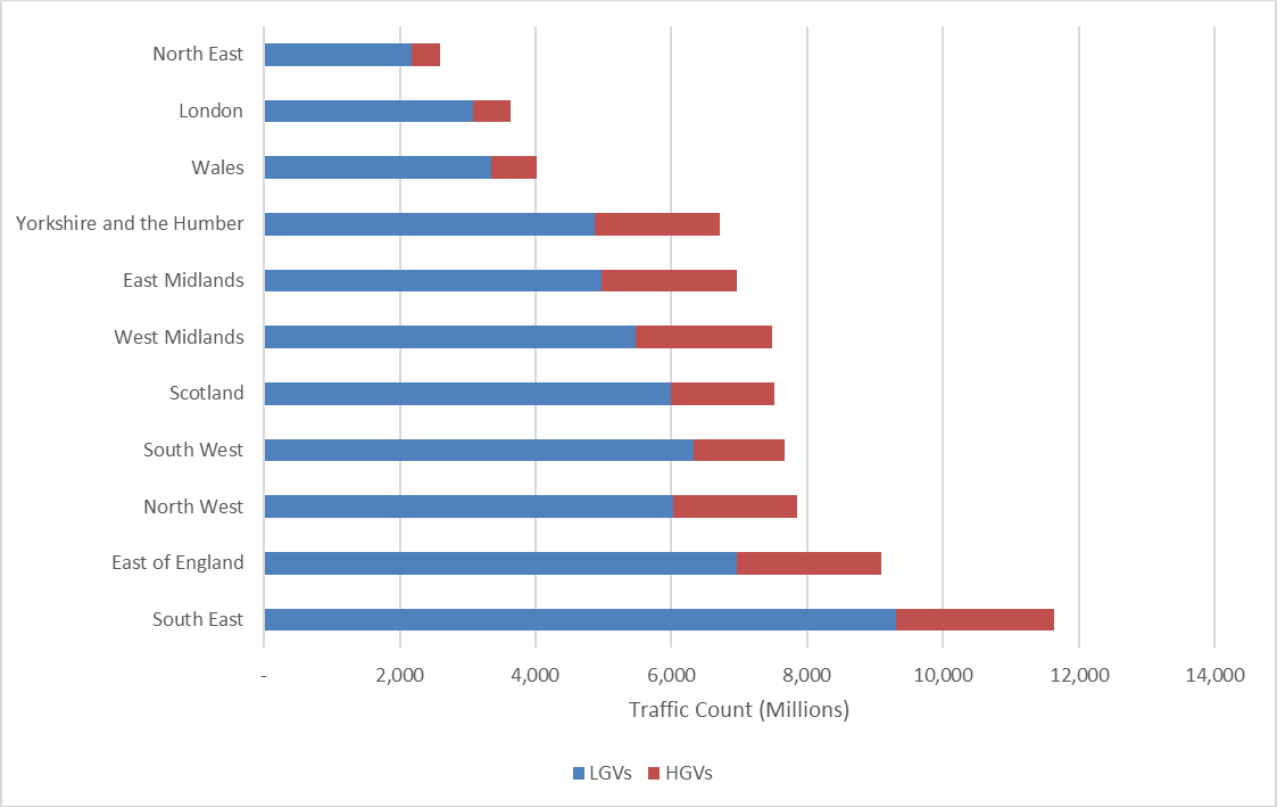


Figure 4 HGV and LGV traffic counts by region (2024) (Department for Transport)

Distribution of freight flows

3.3.10 When looking at freight flows departing the East Midlands at a local authority level, Figure 5 depicts the amount of freight leaving from each area.

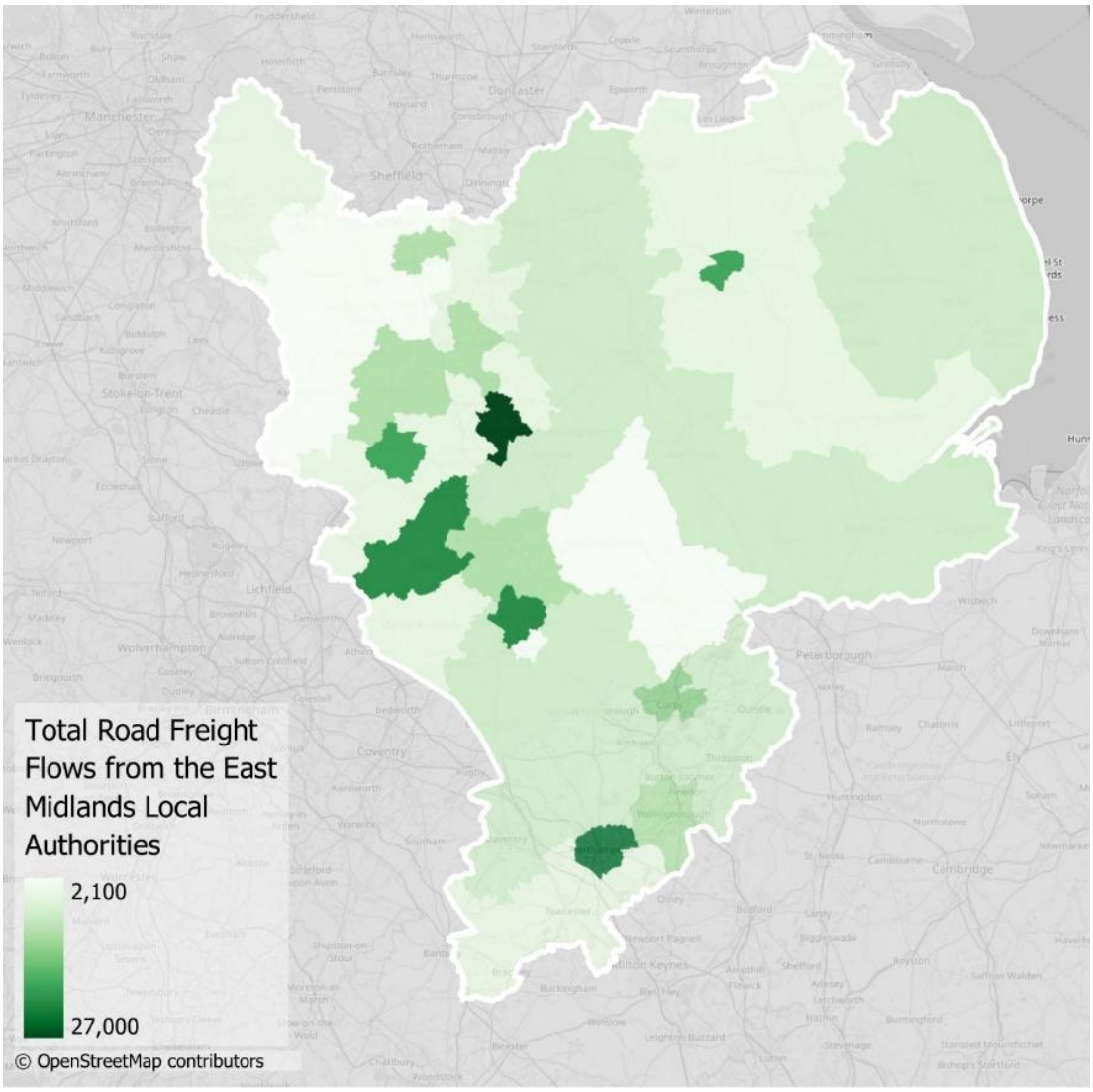


Figure 5 Total daily road freight flow originating in the East Midlands by local authority

3.3.11 Whilst origin freight flows are distributed across the region, the local authorities with the highest origin flows are Derby, Leicester, Lincoln, North West Leicestershire, Northampton and Nottingham. These locations are key economic hubs within the region and are also in proximity to freight termini. Comparatively, local authorities in rural areas with less economic activity present have significantly less freight departing, such as Derbyshire Dales, Oadby & Wigston and Rutland.

3.3.12 Figure 6 presents the distribution of external flows by time of day and destination location, which present a similar distribution to that of Figure 3. Overall flows are lowest in the off-peak, and higher in the inter-peak compared to the evening peak. Flows during the evening peak are 74% of those compared to the morning peak.

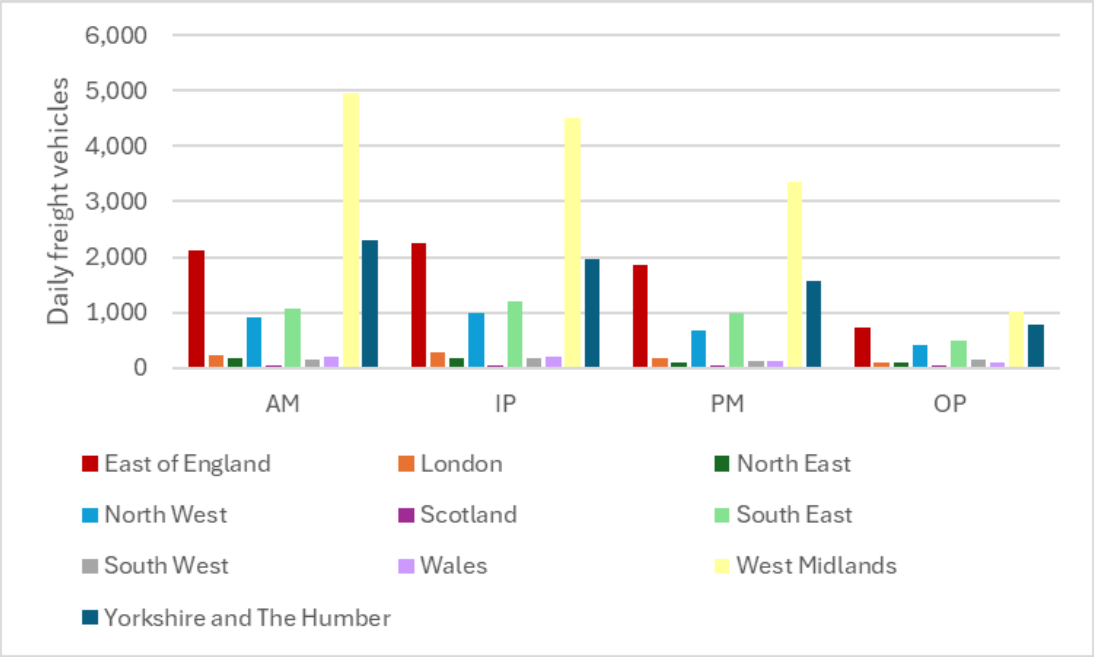


Figure 6 Time and location distribution of external road freight flows terminating in the East Midlands

3.3.13 When looking at freight flows arriving in the East Midlands at a local authority level, Figure 7 depicts the amount of freight terminating within each area.

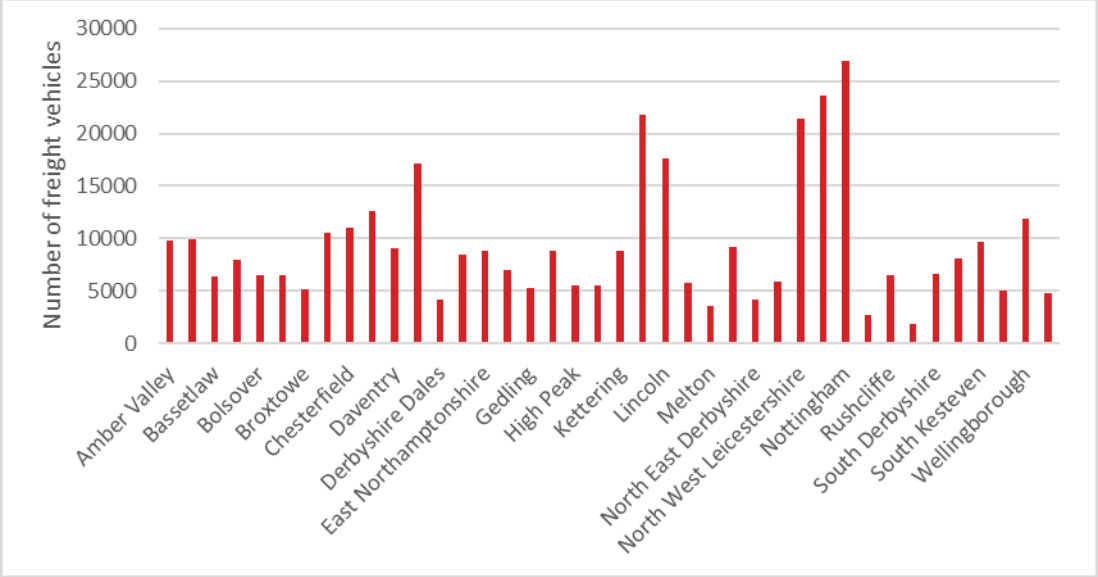


Figure 7 Total daily road freight flow terminating in the East Midlands per local authority

3.3.14 Freight flows arriving at East Midlands local authorities largely follow a similar trend of freight departing. Nottingham, Northampton and North West Leicestershire receive the highest amount of road freight within the region, with Rutland receiving the lowest amount of freight by road.

Daily profile of freight flows on the strategic road network

3.3.15 To understand the daily profile of freight flows on the strategic road network, flow data was extracted from the National Highways WebTRIS database. The data in Table 2 and Figure 8 is for a counter on the M1 northbound just south of East Midlands Airport and the junction with the M42 and is for vehicles longer than 5.21m which has been used as a proxy for LGVs and HGVs. The data is for the time period of Monday 13th October to Sunday 18th October 2025.

Table 2 M1 northbound daily freight flow profile (National Highways WebTRIS)

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
00:00	176	407	346	314	272	232	117
01:00	211	381	375	287	276	237	153
02:00	173	398	378	277	286	246	124
03:00	215	449	425	323	323	246	104
04:00	229	391	398	355	380	225	116
05:00	424	524	536	515	508	219	109
06:00	709	776	767	763	783	289	119
07:00	729	903	983	1017	869	306	152
08:00	877	855	1034	895	1026	319	176
09:00	839	872	1027	937	987	367	210
10:00	884	943	993	956	897	351	263
11:00	898	1044	1128	1106	754	400	289
12:00	1078	1168	1154	1211	1186	379	296
13:00	1055	1091	1145	1249	1229	344	279
14:00	1104	1158	1211	1206	1087	355	287
15:00	1050	1155	1060	966	904	287	297
16:00	891	948	946	883	743	274	328
17:00	637	685	723	745	481	221	255
18:00	461	546	499	213	422	225	271
19:00	390	415	445	345	395	227	248
20:00	408	374	393	455	374	193	214
21:00	390	490	395	382	343	134	235
22:00	474	481	369	327	333	191	226

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
23:00	431	415	335	307	295	157	197

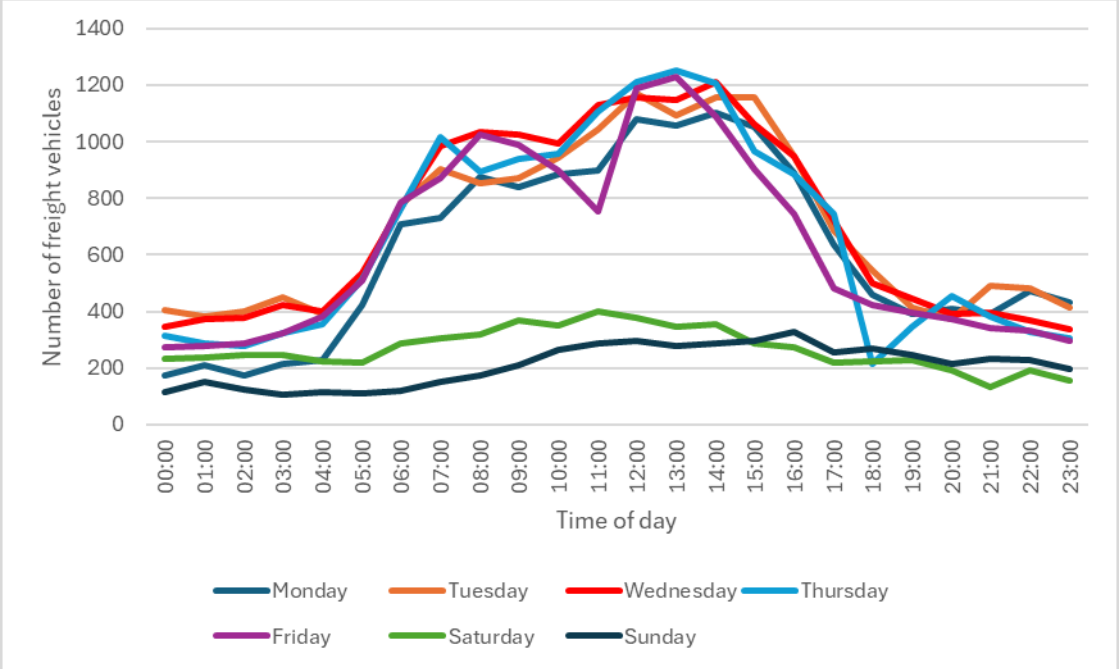


Figure 8 M1 northbound daily freight flow profile (National Highways WebTRIS)

3.3.16 The most common times of day for freight traffic travelling are between the hours of 07:00-08:00 in the early morning peak, and then 13:00-16:00 in the inter-peak afternoon period, particularly during weekdays. Interestingly, there is a significant dip between the hours of 08:00-11:00 on a weekday before levels increase again for the afternoon period. Flows in the typical morning peak period are consistently below those in the mid-afternoon.

3.3.17 There is consistently less road freight traffic operating at weekends compared to during the week, especially during the daytime.

3.3.18 The data in Table 3 and Figure 9 is for a counter on the A52 eastbound just south of Nottingham during the time period of Monday 3rd November to Sunday 9th November 2025.

Table 3 A52 eastbound daily freight flow profile (National Highways WebTRIS)

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
00:00	19	29	30	35	31	21	30
01:00	20	21	33	33	34	24	22
02:00	23	28	32	25	32	30	9
03:00	37	39	35	44	42	36	10
04:00	72	65	71	74	65	49	21
05:00	168	147	140	153	174	53	29
06:00	268	273	270	256	251	73	41
07:00	330	328	302	347	351	142	75
08:00	381	351	358	359	372	178	89
09:00	437	431	439	434	424	197	136
10:00	437	428	438	392	450	176	141
11:00	397	412	404	409	427	184	173
12:00	403	423	420	420	392	182	159
13:00	441	411	440	431	415	184	157
14:00	431	399	399	395	363	151	142
15:00	414	389	398	380	313	148	148
16:00	323	303	264	236	227	135	140
17:00	204	175	198	162	169	126	153
18:00	142	139	153	166	143	106	113
19:00	131	105	142	114	133	62	74
20:00	86	91	112	97	113	60	60
21:00	78	65	71	70	61	58	56
22:00	54	46	52	48	58	43	38
23:00	36	46	31	41	37	30	62

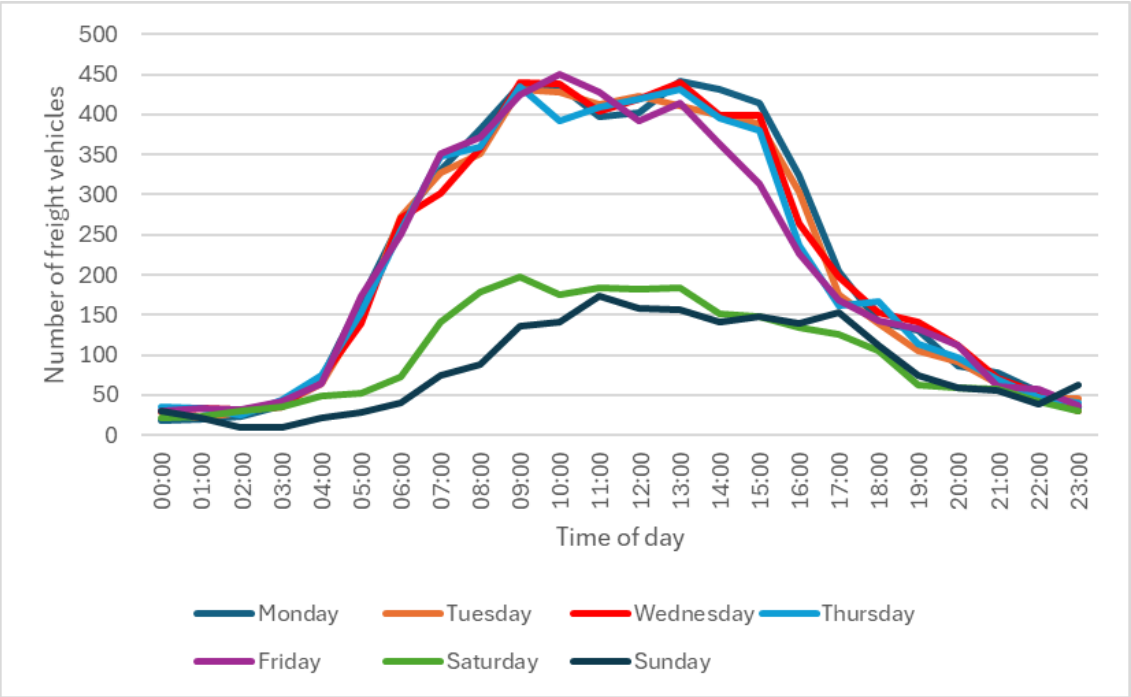


Figure 9 A52 eastbound daily freight flow profile (National Highways WebTRIS)

3.3.19 The highest amount of freight flows occurs between 08:00 and 16:00 during the weekdays, and levels remain generally consistent on each weekday, before tailing off in the early evening from around 17:00. Weekend freight flows are considerably lower than weekday flows, although there is less variation during the evening and throughout the night than during the daytime.

3.3.20 The data in Table 4 and Figure 10 is for the A1 northbound just south of Retford during the time period of Monday 3rd November to Sunday 9th November 2025.

Table 4 A1 northbound daily freight flow profile (National Highways WebTRIS)

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
00:00	66	119	86	110	109	100	69
01:00	98	121	86	105	125	87	47
02:00	82	87	110	113	119	88	50
03:00	104	133	142	139	154	103	48
04:00	210	230	237	247	211	107	58
05:00	297	391	457	428	411	131	78
06:00	503	576	581	599	519	198	109
07:00	576	638	591	625	608	222	123
08:00	572	587	625	640	588	248	148
09:00	595	553	604	526	601	273	184
10:00	605	615	566	622	624	275	187
11:00	522	606	623	669	649	234	216
12:00	591	617	654	622	682	242	296
13:00	614	684	689	807	740	243	234
14:00	575	661	688	709	668	221	229
15:00	642	591	689	737	607	204	227
16:00	496	556	570	604	439	191	278
17:00	436	435	447	491	343	176	225
18:00	296	291	313	291	324	123	165
19:00	213	225	226	307	180	110	136
20:00	158	171	178	216	181	89	103
21:00	142	141	136	122	125	63	101
22:00	112	110	118	108	120	62	103
23:00	103	99	117	109	97	66	143

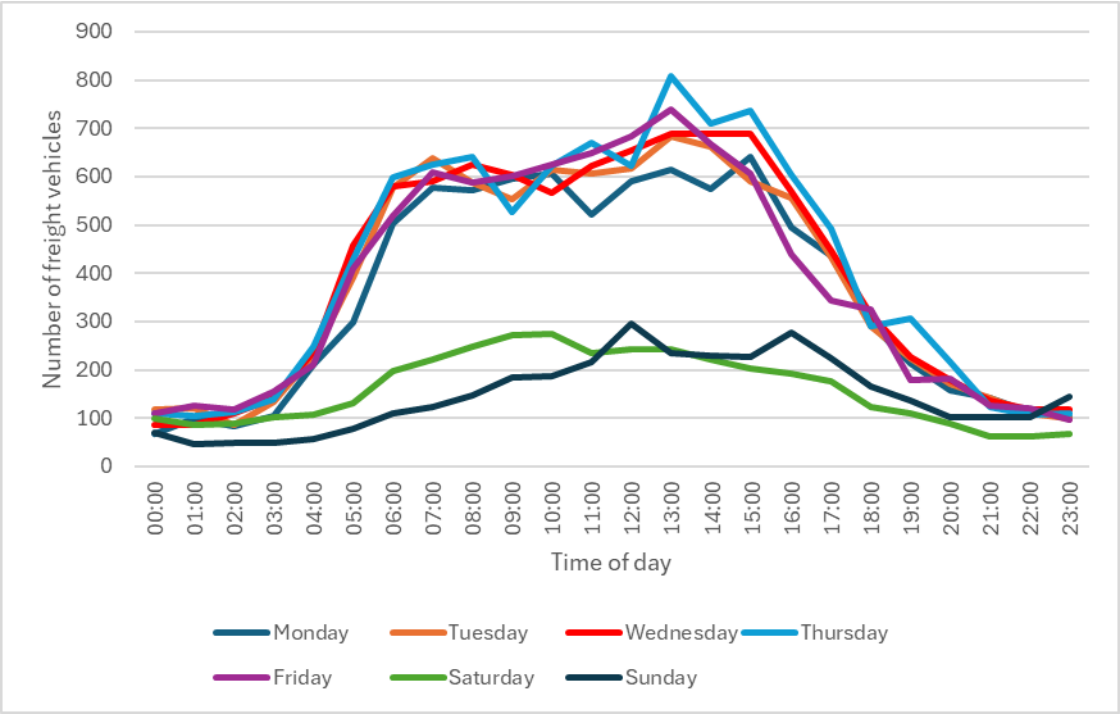


Figure 10 A1 northbound daily freight flow profile (National Highways WebTRIS)

3.3.21 Freight flows along this section of road follow a very similar pattern to those along the M1, with generally the highest freight flows occurring during the mid-afternoon and afternoon peak periods. It is worth noting that the data for the A1 indicates more freight travelling on Sunday afternoons and evenings than at the equivalent times on a Saturday. The highest freight flows occur during the middle of the day from Wednesday to Friday.

Rail

3.3.22 The East Midlands sits at the heart of the UK's rail network, where north-south and east-west routes intersect. Core arteries include the Midland Main Line (MML) thro ugh Leicester, Derby, and Nottingham; connections to the East Coast Main Line (ECML) towards the Humber and the North; cross-country links towards the West Midlands; and routes east towards key sea freight terminals. This positioning enables efficient trunk haulage between southern deep-sea gateways, northern manufacturing bases, and inland distribution centres.

3.3.23 This section will highlight the breakdown of flows by commodity type, showcase the flows interacting

The positive environmental impact of rail freight

Analysis undertaken of rail freight flows in the Peak District demonstrate that rail is taking significant numbers of HGVs off the road network. The National Park is an environmentally sensitive area, with additional constraints on vehicle movements such as weight restrictions on the A57 Snake Pass, Baslow Bridge, and through Holmesfield and Barlow. Over the course of a typical ***five-day weekday period****, rail freight flows in the Peak District saved over* ***950,000 HGV kms*** *and nearly* ***2.5 tonnes of CO_2****. This includes a significant number of shorter distance trips to Greater Manchester, a market where the economics are supported by long distance flows and licence requirements to reduce the HGV movements.*

within the region (highlighting key active freight terminals), and provide a discussion on mothballed rail terminals.

Context

3.3.24 The East Midlands has seen a major shift in the nature of the rail freight market over the last 30 years. Until the mid-1990s rail freight was dominated by coal traffic moving from local collieries to the Trent Valley power stations. As local collieries closed and imported coal replaced them, freight flows evolved with power stations supplied from ports, notably Immingham, but at different times Hunterston in Ayrshire, Liverpool and Avonmouth.

3.3.25 The loss of short distance movements resulted in a drop in the usage of freight lines such as Leicester–Coalville–Burton, but did provide additional capacity for enhanced passenger service on mainlines. Over the last 10 to 15 years the power stations themselves have closed as a result of the transition to greener energy, with a total loss of coal traffic. However, the capacity released has been reused, both by revisions to passenger services but also with an increase in long distance aggregate traffic, especially from the Peak District to London. This reflects both increased construction activity in the capital but also the exhaustion of more local sources of aggregates in the South East. The intermodal market has also grown very substantially.

Freight Operating Companies (FOCs)

3.3.26 Nine FOCs operate services within the East Midlands area, running trains both internally and externally to and from the region. DC Rail, DB Cargo and Legge Infrastructure Services comprise a significant proportion of services operating, through the area, with over three quarters of all freight services run by these companies. This split between FOCs is presented in Figure 11.

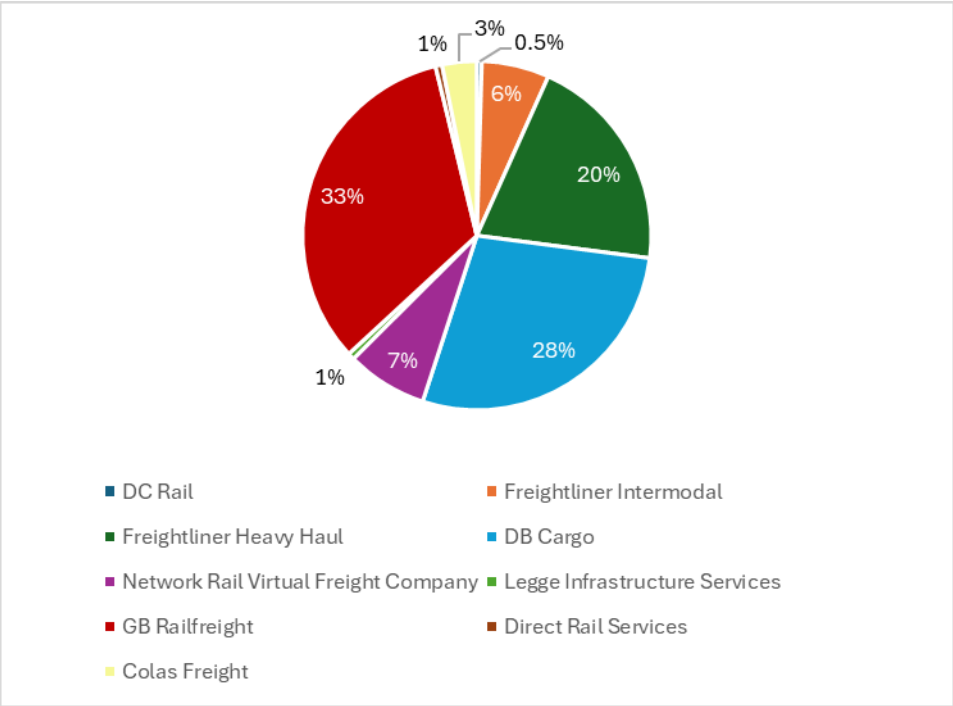


Figure 11 Proportion of daily services ran by FOCs in the East Midlands

3.3.27 Compared to national splits, presented in Figure 12, the proportion of services run by GB Railfreight, DB Cargo and Colas Freight is higher in the East Midlands, with Freightliner (both intermodal and heavy haul) comparatively similar. Direct Rail Services run a slightly higher proportion of services nationally.

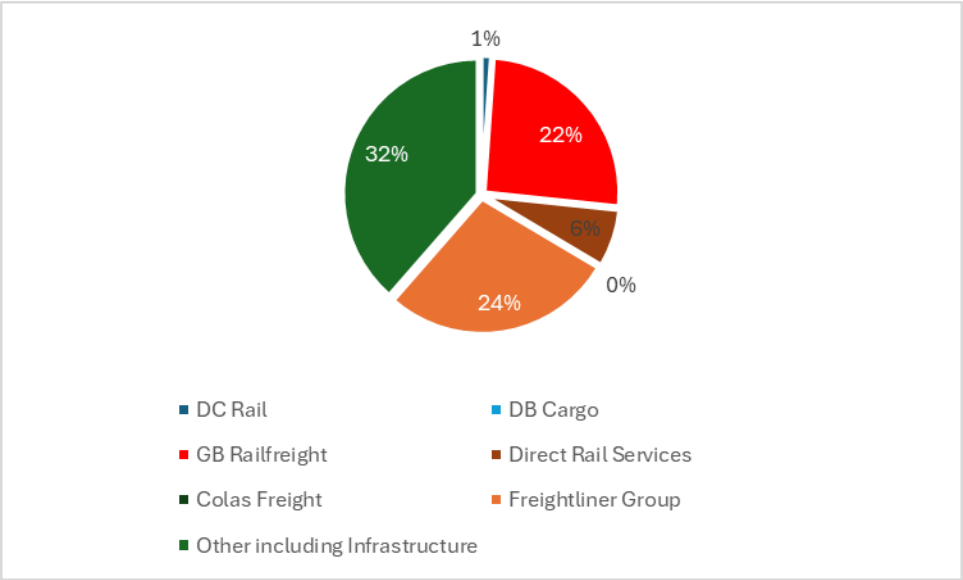


Figure 12 Proportion of freight services (by million train kms) in Great Britain (October to December 2025)[2]

Daily rail freight services arriving and departing from the East Midlands

3.3.28 Table 5 presents the number of daily train paths serving the East Midlands region based on the most common origin and destination locations.

Table 5 Freight paths serving the East Midlands

ORIGIN LOCATION	ORIGIN REGION	NUMBER OF PATHS	DESTINATION LOCATION	DESTINATION REGION	NUMBER OF PATHS
Mountsorrel Sidings	East Midlands	28	**Mountsorrel Sidings**	East Midlands	24
Toton North Yard	East Midlands	22	**Toton North Yard**	East Midlands	22
Hope (Earles Sidings) FHH	East Midlands	13	**Hope (Earles Sidings) FHH**	East Midlands	17
Doncaster Up Decoy	Yorkshire and The Humber	8	**East Midlands Gateway Terminal DBC**	East Midlands	13
Dowlow Quarry FLHH	East Midlands	8	**Bardon Hill GBRf**	East Midlands	9
East Midlands Gateway Terminal DBC	East Midlands	8	**East Midlands Gateway Terminal GBRf**	East Midlands	8

[2] 'Freightliner Intermodal' and 'Freightliner Heavy Haul' combined into a single value – 'Freightliner Group' – in the national data.

ORIGIN LOCATION	ORIGIN REGION	NUMBER OF PATHS	DESTINATION LOCATION	DESTINATION REGION	NUMBER OF PATHS
East Midlands Gateway Terminal GBRf	East Midlands	8	**Immingham HIT (GBRf)**	Yorkshire and The Humber	8
Wellingborough Up TC GBRf	East Midlands	8	**Peak Forest Cemex GBRf**	East Midlands	8
Peak Forest R.M.C Sidings	East Midlands	6	**Doncaster Up Decoy**	Yorkshire and The Humber	7
Toton Centre	East Midlands	6	**Toton Up Sidings**	East Midlands	7
Whitemoor Yard	East of England	6	**Tunstead Sidings (FHH)**	East Midlands	6
Bardon Hill GBRF	East Midlands	5	**Peak Forest R.M.C. Sdgs**	East Midlands	5
Barrow Hill Up Sdgs No. 2 and 3	East Midlands	5	**Basford Hall Yard (FL)**	East Midlands	4
Bradwell Up Sidings Colas	West Midlands	5	**Dowlow Quarry FLHH**	East Midlands	4
Felixstowe North EWS	East of England	5	**Elstow Redland Sdg**	East of England	4
Peak Forest Cemex GBRF	East Midlands	5	**Mountsorrell GBRF**	East Midlands	4
Toton Up Sdgs	East Midlands	5	**Wellingborough Up TC GBRf**	East Midlands	4
Bescot Engineers Sdgs	West Midlands	4	**Barham**	East of England	3
Boston Sleaford Sidings	East Midlands	4	**Bescot Engineers Sdgs**	West Midlands	3
Corby B.S.C.	East Midlands	4	**Bradwell Up Sidings Colas**	West Midlands	3

3.3.29 There is generally a low and even distribution of rail freight paths both originating and terminating within the East Midlands, with notable peaks from internal-only services. These include **Mountsorrel Sidings** (south of Barrow-on-Soar on the Midland Main Line), **Toton North Yard** (Erewash Valley Line), **Hope (Earles Sidings)** (Hope Valley Line), and **East Midlands Gateway Terminal DBC** for East Midlands Airport. It is particularly worth noting Mountsorrel

Sidings, which receives at least three times more freight paths than any location outside of the top five list, thus highlighting the predominance of this as a location within the region.

3.3.30 Of the locations in Table 5 that are outside the East Midlands (highlighted by shading), and therefore represent paths entering the region, the regions that feature are East of England, West Midlands, and Yorkshire and the Humber. All three of these border the East Midlands, and demonstrate that the majority of freight paths in the region are either internal or from neighbouring regions.

3.3.31 It is also important to recognise how no trains to and from some key freight handling termini in the UK, such as London Gateway and Southampton, appear on this list. Furthermore, whilst Felixstowe (another key national termini) does appear on the list of paths terminating in the East Midlands (with five daily), this number is significantly lower than other locations. It is also important to note that these are paths and therefore do not represent services that are guaranteed to run every single day.

Daily rail freight services arriving at and departing from Immingham

3.3.32 To represent the number of daily train paths in and out of Immingham (in Greater Lincolnshire, just outside the East Midlands), Table 6 presents the number of daily train paths passing through the nearby Brocklesby Junction.

Table 6 Freight paths passing through Brocklesby Junction (for Immingham)

ORIGIN LOCATION	ORIGIN REGION	NUMBER OF PATHS	DESTINATION LOCATION	DESTINATION REGION	NUMBER OF PATHS
Immingham Biomass Lp (Dbc)	Yorkshire and Humber	41	Immingham Biomass Lp (Dbc)	Yorkshire and Humber	42
Drax Power Station	Yorkshire and Humber	34	Drax Power Station	Yorkshire and Humber	41
Humber Oil Refinery	Yorkshire and Humber	9	Kingsbury Oil Sdgs	West Midlands	9
Kingsbury Oil Sdgs	Yorkshire and Humber	8	Humber Oil Refinery	Yorkshire and Humber	8
Milford West Sidings	Wales	8	Immingham Bulk Terml Cp1	Yorkshire and Humber	6
Immingham Bulk Terml Cp1	Yorkshire and Humber	6	Scunthorpe Anchor Sidings	Yorkshire and Humber	4
Immingham Sorting Sidings	Yorkshire and Humber	3	Immingham Sorting Sidings	Yorkshire and Humber	3
Scunthorpe Anchor Sidings	Yorkshire and Humber	3	Scunthorpe B.S.C.(C.H.P.)	Yorkshire and Humber	3

ORIGIN LOCATION	ORIGIN REGION	NUMBER OF PATHS	DESTINATION LOCATION	DESTINATION REGION	NUMBER OF PATHS
Scunthorpe B.S.C.(C.H.P.)	Yorkshire and Humber	3	Scunthorpe Trent T.C.	Yorkshire and Humber	2
Scunthorpe Trent T.C.	Yorkshire and Humber	3	Tinsley S.S.	Yorkshire and Humber	2
Humber International Term	Yorkshire and Humber	2	York	Yorkshire and Humber	2
Immingham Dock Nordic	Yorkshire and Humber	2	Belmont Down Yard	Yorkshire and Humber	1
York	Yorkshire and Humber	2	Hope (Earles Sidings) Dbs	East Midlands	1
Barnetby Sdgs Colas Rail	Yorkshire and Humber	1	Humber International Term	Yorkshire and Humber	1
Grimsby Town	Yorkshire and Humber	1	Immingham Dock Nordic	Yorkshire and Humber	1
Round Oak	West Midlands	1	Lindsey Oil Refinery Colas	Yorkshire and Humber	1
Tinsley S.S.	Yorkshire and Humber	1	Wolverhampton Steel Term	West Midlands	1

3.3.33 Freight paths to and from Immingham are dominated by Immingham Biomass and Drax Power Station, as well as a lower number of paths to and from Humber Oil Refinery and Kingsbury Oil Sidings. Most of the paths are to locations a relatively short distance away in Yorkshire and Humber.

Region entry and exit locations

3.3.34 Figure 14 highlights the key entry and exits points for rail freight interacting with the East Midlands region.

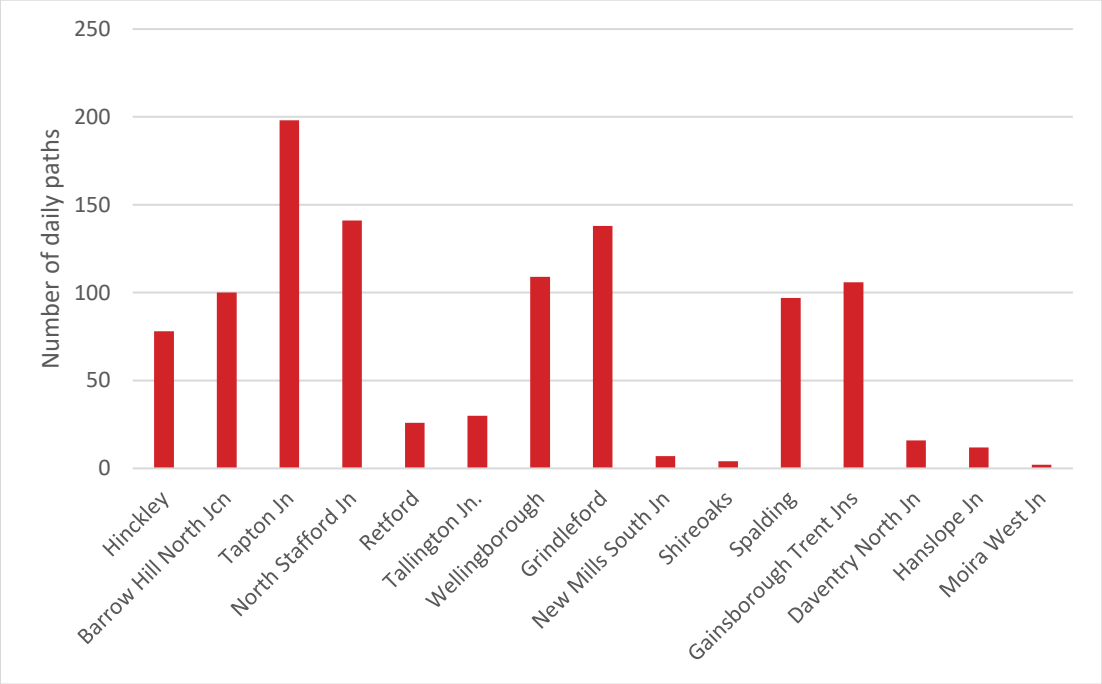


Figure 13 Number of rail freight paths using regional rail entry/exit points

Figure 14 Number of rail freight paths using regional rail entry/exit points

3.3.35 Many of the entry and exit points with the higher volumes of rail freight traffic entering and exiting the region are located on key arterial routes connecting to other regions. Examples of these include **Tapton Junction** (north of Chesterfield), which serves as a key route for freight travelling north, and this junction sees the highest amount of freight passing in and out of the region.

3.3.36 In the south-west of the region, **North Stafford Junction** sees a similarly high amount of freight traffic passing through, which is the key route in a south-westerly direction, along with **Wellingborough** on the Midland Main Line heading south. Additionally, locations such as **Barrow Hill North Junction** see significant rail freight traffic – the Barrow Hill Line is typically used by freight services with limited passenger services, unlike the examples mentioned previously. **Gainsborough Trent Junction** is also an example of a point in the network where passenger and freight services diverge.

3.3.37 Additional examples such as **Grindleford** on the Hope Valley line receive significant freight traffic going to and from key freight termini along the line, such as Hope (Earle Sidings) and Peak Forest.

Rail freight by commodity type

3.3.38 Rail freight flows in the region have been divided into commodity type, using the following categories:

- **Construction**: services to/from quarries/cement works etc.
- **Energy**: services to/from oil terminals etc.
- **Intermodal**: services to/from ports/container terminals etc.
- **Rail Infrastructure**: typically yards, sidings and trains running to support Network Rail infrastructure maintenance and renewal work
- **Steel**: services to/from steelworks
- **Other**: any other small number of service types that do not fall into the above categories

3.3.39 Figure 15 presents the number of freight paths serving the East Midlands by commodity type.

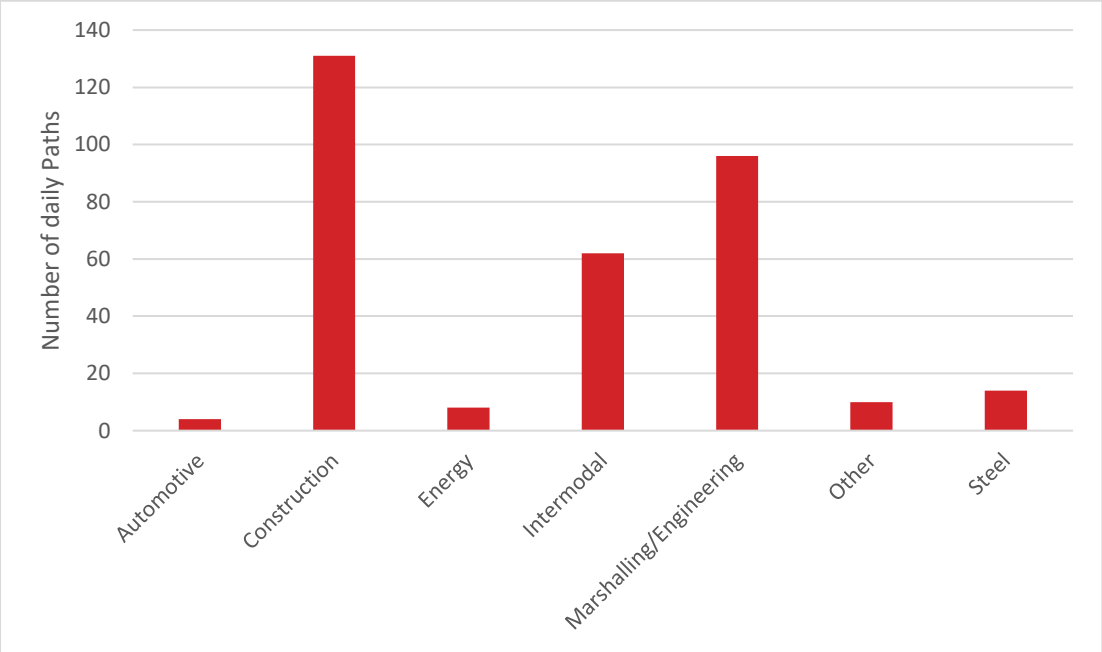


Figure 15 Number of rail freight services serving the East Midlands by commodity type

3.3.40 The number of rail freight services serving the East Midlands are dominated by three core types: construction, marshalling/engineering and intermodal; with freight trains transporting goods for the construction industry comprising the largest proportion of services. Marshalling/engineering and intermodal services comprise around three quarters and two thirds of the levels of construction services respectively, with a much smaller proportion of services operating for the steel and energy sectors.

3.3.41 Compared to national figures (using million net tonne kms for the period April 2025 to March 2026), the proportion for construction is slightly higher than nationally (40% compared to 33%), whilst intermodal is lower (19% in the region, 41% nationally).

3.3.42 Whilst these flows are distributed around the region, Table 7 and Table 8 present the locations which have a larger number of services for a specific commodity type originating and terminating at them.

Table 7 Primary commodity type for origin locations for rail freight services operating to the East Midlands

ORIGIN LOCATION	PRIMARY COMMODITY TYPE	NUMBER OF PATHS
Mountsorrel Sidings	Construction	28
Toton Yard	Network Rail	28
Hope (Earles Sidings) FHH	Construction	13
Dowlow Quarry FLHH	Construction	8
East Midlands Gateway Terminal	Intermodal	16
Wellingborough Up TC GBRf	Intermodal	8
Peak Forest R.M.C Sidings	Construction	6

Table 8 Primary commodity type for terminus locations for rail freight services operating from the East Midlands

DESTINATION LOCATION	PRIMARY COMMODITY TYPE	NUMBER OF PATHS
Mountsorrel Sidings	Construction	24
Toton Yard	Network Rail	29
Hope (Earles Sidings) FHH	Construction	17
East Midlands Gateway Terminal	Intermodal	21
Bardon Hill GBRf	Construction	9
Peak Forest Cemex GBRf	Construction	8
Tunstead Sidings (FHH)	Construction	6

3.3.43 The core origins and destinations follow a similar trend to the total commodity type counts, with the construction industry representing the highest rail freight counts within the region, which are centred around the key hubs **of Mountsorrel Sidings, Hope (Earles Sidings), Dowlow Quarry, Bardon Hill, Peak Forest and Tunstead Sidings.** A new flow internal to the East Midlands will be aggregates traffic from Peak District quarries to the "Supercluster" around the former Trent Valley power stations as they are redeveloped.

3.3.44 When considering core marshalling/engineering sites across the region, **Toton** acts as a primary site for these services originating and terminating. Additionally, sites including **East**

Midlands Gateway and **Wellingborough GBRf** are important locations when it comes to intermodal freight flows in and out of the region.

3.3.45 This range in commodity types flowing both internally across and externally in and out of the region emphasises the importance of the East Midlands from a regional and national perspective in handling a diverse range of freight materials.

3.3.46 It is also worth noting that the decline in coal over the last 10-20 years, and the substantial rise in intermodal flows, has had a significant impact on freight traffic on the rail network, and this is particularly the case in the East Midlands. Traffic on traditional mine-to-power-plant routes to the likes of Ratcliffe-on-Soar and Cottam has reduced, whereas intermodal flows concentrate demand on routes between seaports, inland ports and suburban logistics hubs on the edge of cities and on key highway nodes, such as East Midlands Gateway and Daventry IRFT.

3.3.47 Coal traffic is also relatively predictable with steady volumes and schedule patterns, whereas intermodal is often time-sensitive, runs to tighter schedules with higher frequencies, and can be volatile in its demand, linked to container arrivals at ports and impacted by disruption down the supply chain. This requires greater resilience in the rail freight network and an ability to respond to and accommodate demand changes.

Freight passing through the East Midlands without stopping

3.3.48 The following table presents the number of daily freight train paths passing through the East Midlands region without stopping based on the most common origin and destination locations.

Table 9 Freight paths passing through the East Midlands

ORIGIN LOCATION	ORIGIN REGION	NUMBER OF PATHS	DESTINATION LOCATION	DESTINATION REGION	NUMBER OF PATHS
Felixstowe North GBRF	East of England	11	**Felixstowe North F.L.T.**	East of England	14
Felixstowe South GBRF	East of England	11	**Felixstowe North GBRF**	East of England	14
Felixstowe North F.L.T.	East of England	10	**Felixstowe South GBRF**	East of England	11
Doncaster Iport GBRF	Yorkshire and The Humber	9	**Doncaster Iport GBRF**	Yorkshire and The Humber	10
Leeds F.L.T.	Yorkshire and The Humber	8	**Masborough N&W GBRF**	Yorkshire and The Humber	9
Tinsley S.S.	Yorkshire and The Humber	8	**Leeds F.L.T.**	Yorkshire and The Humber	8
Felixstowe North EWS	East of England	7	**London Gateway GBRF**	East of England	7

ORIGIN LOCATION	ORIGIN REGION	NUMBER OF PATHS	DESTINATION LOCATION	DESTINATION REGION	NUMBER OF PATHS
Hams Hall GBRF	West Midlands	7	**Doncaster Up Decoy**	Yorkshire and The Humber	6
London Gateway GBRF	East of England	7	**Masborough F.D.**	Yorkshire and The Humber	6
Masborough N&W GBRF	Yorkshire and The Humber	7	**Peterborough North Yd GBRf**	East of England	6
Tinsley Yard GBRf	Yorkshire and The Humber	7	**Southampton M.C.T.**	South East	6
Doncaster Up Decoy	Yorkshire and The Humber	6	**Tinsley S.S.**	Yorkshire and The Humber	6
Masborough F.D.	Yorkshire and The Humber	6	**Tinsley Yard GBRf**	Yorkshire and The Humber	6
Whitemoor Yard	East of England	6	**Wakefield Europort RFD**	Yorkshire and The Humber	6
Southampton M.C.T.	South East	5	**Hedon Road Sidings**	Yorkshire and The Humber	5
Belmont Down Yard	Yorkshire and The Humber	4	**Immingham Sorting Sidings**	Yorkshire and The Humber	5
Doncaster EPT (F'liners)	Yorkshire and The Humber	4	**Kingsbury Oil Sdgs**	West Midlands	5
Kingsbury Oil Sdgs	West Midlands	4	**Margam T.C.**	Wales	5
Lindsey Oil Refinery COLAS	Yorkshire and The Humber	4	**Felixstowe North EWS**	East of England	4
Margam T.C.	Wales	4	**Hams Hall GBRF**	West Midlands	4

3.3.49 The largest proportion of trains passing through the East Midlands are travelling either to or from the Port of Felixstowe, with over three times the number of daily paths to and from this key freight hub even compared to the second highest terminal at Doncaster Iport GBRF. However, whilst a significant proportion of paths are associated with Felixstowe, a consistent distribution either originates or terminates across Yorkshire and the Humber, including hubs such as Masborough F.D., Tinsley S.S. and Leeds F.L.T. There are no freight paths passing through associated with the North East, South West or Scotland.

3.3.50 The flows passing through the region have been split by commodity type as presented in Figure 16.

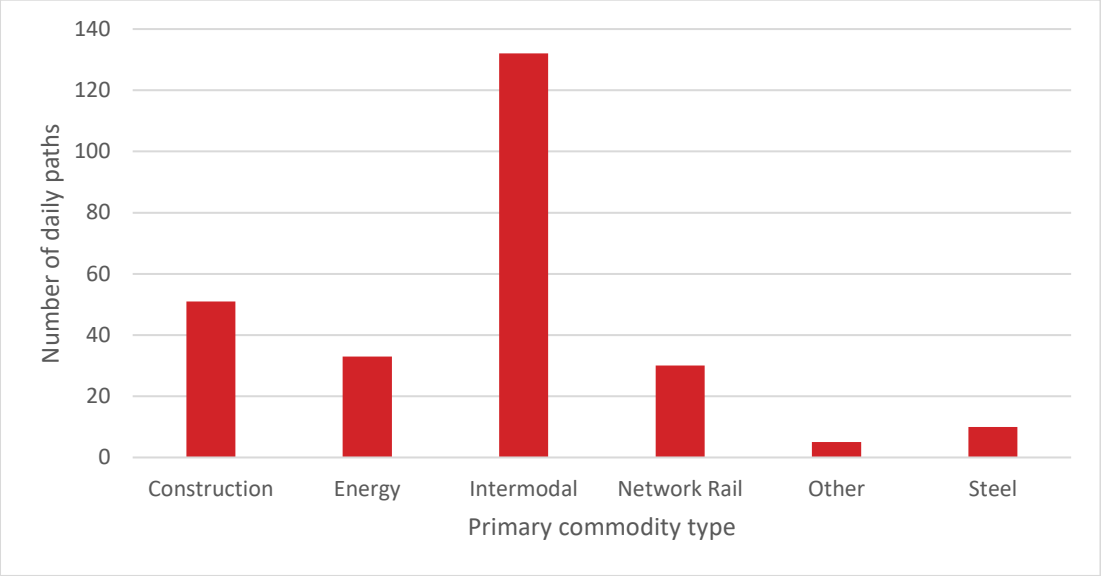


Figure 16 Rail freight paths passing through the East Midlands by commodity type

3.3.51 The vast majority of freight paths passing through the East Midlands are those travelling either to or from key intermodal freight hubs, with this figure around three times higher than the second highest commodity type in the form of construction.

3.3.52 Key routes that are being used by freight passing through the East Midlands are:

- The GNGE Joint Line between Peterborough and Doncaster via Lincoln. A total of 63 (two-way) freight paths are planned for this route each day with intermodal services dominating. The route was specifically upgraded to accommodate freight traffic diverted from the ECML, however the volume of freight traffic limits the scope for developing passenger traffic further
- Trent – Toton – Chesterfield - around 70 trains paths per day (two way) exist for freight on this route with services being a mixture of intermodal traffic and aggregate traffic – some of which is routed via the Hope Valley Line to and from quarries in the Peak District
- Derby – Chesterfield – approximately 30 paths per day existing on this route, with the majority being at night or the evening when fewer passenger services are operating. Key flows include steel traffic to and from South Wales
- Birmingham – Derby – approximately 60 freight paths exist on this route with a mixture of intermodal, steel and oil traffic. As well as through traffic there is some East Midlands orientated traffic such as intermodal trains and from East Midlands Gateway

3.3.53 It is notable that a number of routes such as the ECML and the Nottingham – Newark Line see comparatively few freight trains. In the case of the former this is due to a lack of available paths due to passenger traffic and in the case of the latter is in part due to the decline of oil traffic from the South Humber Bank to the Midlands.

Mothballed rail terminals

3.3.54 Across the region, facilities associated with historic coal traffic and steelwork supply chains have been prime candidates for mothballing. Former power-station reception sidings and private industrial branches often retain track and basic access but lack regular movements,

effectively placing them in an 'out of use' status. Meanwhile, some private sidings tied to specific customers can oscillate between dormant and active depending on contracts.

3.3.55 Examples of mothballed sites within the East Midlands include:

- **Ratcliffe-on-Soar** (Nottinghamshire/Leicestershire border): Extensive rail infrastructure associated with the power station; flows ceased, with portions reported as out of use pending site redevelopment timelines.
- **West Burton and Cottam** (Nottinghamshire): Former coal reception sidings and loops; rail access still visible in places though regular freight movements have ceased since station closures.
- **High Marnham** branch remnants (Nottinghamshire): Legacy infrastructure from power generation era; sections listed as out of use, with parts repurposed for test/maintenance but freight handling long ceased.

Level crossings

3.3.56 Rail freight flows can often have a significant impact on communities and the local road network, and whilst passenger services can also have this effect, this is (to an extent) mitigated if they are also serving the communities through which they operate. The impact of freight services is primarily due to their length and running speeds necessitating a significant barrier downtime while the service passes through the crossing.

3.3.57 In order to give an indication of this issue in the East Midlands, analysis was undertaken of the level crossing in Oakham in Rutland. The level crossing in Oakham is in the heart of the town centre, just south of the station. The line through Oakham is used by a large volume of container trains operating from Felixstowe to the Midlands and North West, as well as freight traffic originating in London and the South East, which operates via Corby joining the Peterborough – Leicester line at Manton Junction near Oakham. At Oakham there is a short section of four tracking with goods lines running to Langham Junction around 1.25 miles away. These lines are used to regulate freight trains maximising the capacity of the line, however this means that freight trains are often slowing to enter these lines or accelerating from a standing start as they rejoin the mainline.

3.3.58 The analysis compared the downtime of freight services compared to passenger services, assuming the train passing Manton Junction initiates the barrier sequence. It was assumed that freight services not recessed on the goods lines west of Manton were formed of one Class 66 locomotive and 34 container wagons clearing the crossing at 60mph. For freight services recessed on the goods lines, the crossing speed was assumed to be 20mph for down services and 15mph for up services.

3.3.59 The results of the analysis are presented in Table 10.

Table 10 Oakham level crossing downtime analysis

FLOW TYPE	TYPICAL DOWNTIMES (MINUTES:SECONDS)	NUMBER OF OCCURENCES OVER A TYPICAL DAY	TOTAL DOWNTIME OVER A TYPICAL DAY
Down services			
Passenger	04:15	20	1 hour 25 minutes
Freight	07:20	11	1 hour 21 minutes
Freight (recessed on goods lines)	07:20	2	15 minutes
Up services			
Passenger	01:30	17	26 minutes
Freight	04:52	7	34 minutes
Freight (recessed on goods lines)	04:27	5	22 minutes
Average downtime per hour		**16:24**	

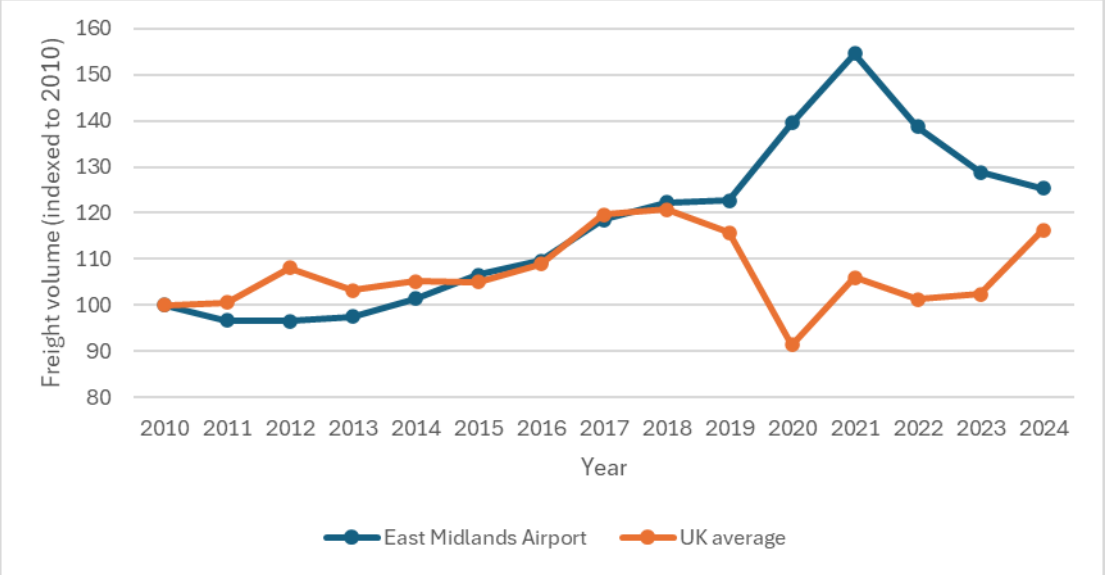
3.3.60 Taken over a typical operating day between 0600 and 2200, the average barrier downtime is 16:24 per hour. If goods line freight trains could pass at 45mph rather than 15mph, the typical downtime for these up services would reduce to 02:09 from 04:27, bringing the overall hourly average down to 15:35, saving roughly 48 seconds per hour, and preventing a large downtime of 04:27 when goods line freight trains pass. The average hourly downtime would also fall approximately 5%, saving time for road users on the crossing

3.3.61 This analysis demonstrates the impact that freight services currently have on the level crossing at Oakham, with the level crossing down for approximately 27% on average in a typical day, with resultant delays to local residents and businesses. Indeed, freight trains account for 58% of the average downtime. It also demonstrates the potentially significant benefit of speeding up the goods lines on both average downtimes across a day, and the very long downtimes that can cause frustration for road users. Whilst this presents a test case looking at Oakham level crossing, it also illustrates the principle that investment in infrastructure to better accommodate freight services can have knock-on benefits to communities and local economies.

Air

3.3.62 East Midlands Airport (EMA) serves as the key hub for air freight passing in and out of the region, and in 2025 the airport recorded its third highest year on year increase in cargo in its history. In 2023, EMA's freight productivity contributed £2.6bn in GVA to the UK economy. EMA serves as a cargo-focused airport, with extensive night operations enabling fast turnarounds and broad domestic and international connectivity. EMA is the main base for DHL, and other important air cargo airlines such as UPS and FedEx also operate out of the airport internationally, along with Royal Mail for domestic air cargo movements. This section will outline the key figures relating to air cargo passing through the terminal, along with highlighting the importance of EMA compared to other UK airports.

Tonnes of freight through EMA



3.3.63 Figure 17 presents an illustration of how the annual total tonnes of freight cargo passing through EMA has changed over the 14-year period between 2010 and 2024. The data in the graph is indexed to 2010.

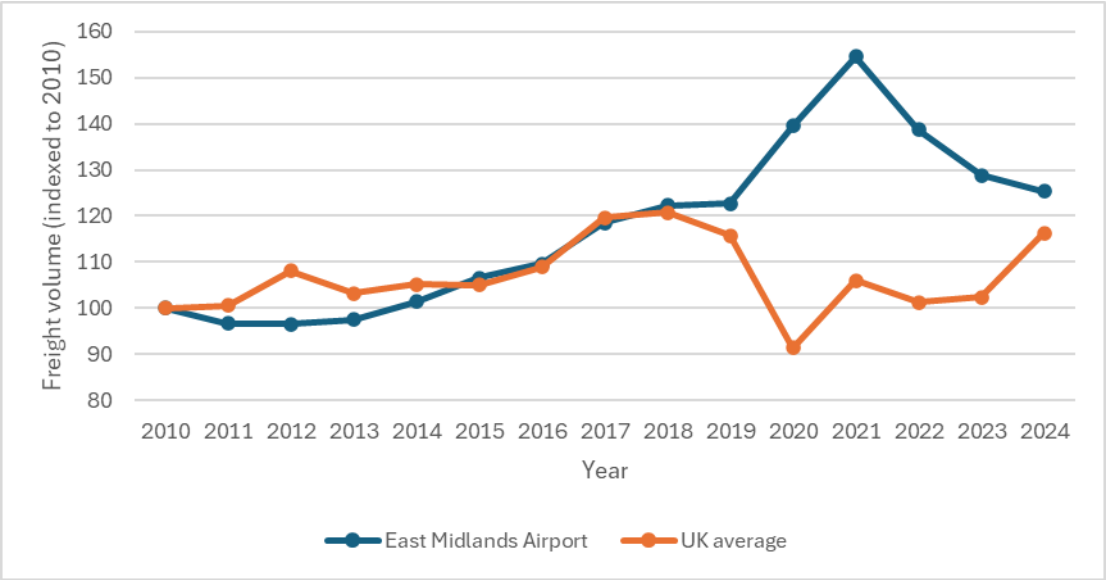


Figure 17 EMA and UK average air freight cargo (indexed to 2010) (CAA)

3.3.64 It is evident that EMA serves as a crucial hub for freight cargo within the UK, with a consistent rise in annual tonnage of cargo passing through the airport from 2012-2021, and this value has remained higher than the national average since 2018. Whilst this not only highlights the growth of freight handling within the airport compared to other UK airports, it is worth noting that – in contrast to the national average – its cargo volume increased during the COVID-19 pandemic. Whilst this number has since reduced, this is perhaps a reflection of its central location in the country and a concentration of air freight cargo at EMA during the restrictions imposed due to the pandemic.

3.3.65 Figure 1816 presents the volume of freight passing through EMA compared to other UK airports.

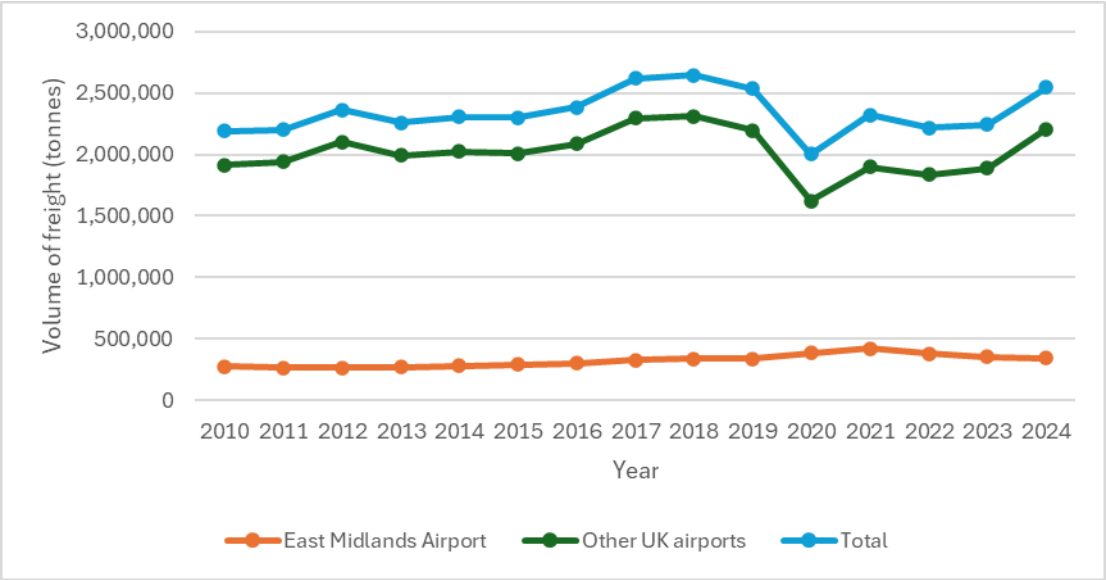


Figure 18 Air freight volume at EMA and other UK airports (CAA)

3.3.66 It is apparent that EMA is a key hub for air freight within the UK, having consistently handled around one fifth of all air freight within the UK over the 14-year period. Although, whilst London area airports (Gatwick, Heathrow, London City, Luton, Southend and Stansted) handle the most cargo within the UK, it is important to recognise that EMA handles more cargo than the rest of the non-London UK airports combined, thus highlighting its prominence as a key freight hub within the UK outside of the capital. Figure 1917 presents data for 2023 demonstrating this.

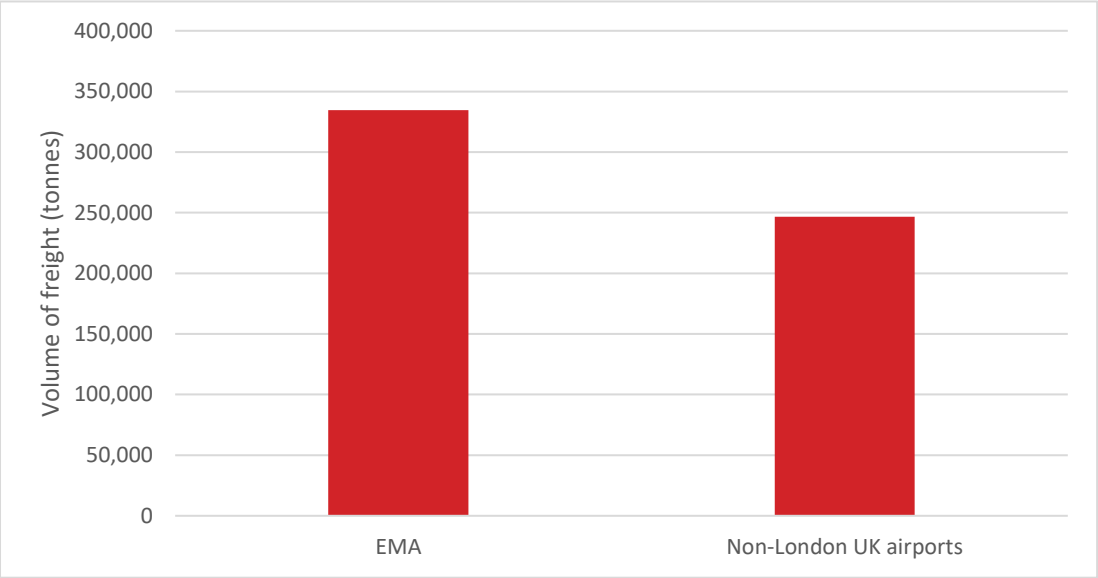


Figure 19 Total volume of freight cargo at EMA and non-London UK airports in 2023 (CAA)

3.3.67 Figure 20 presents data for daily road freight traffic both arriving and leaving North West Leicestershire, the local authority that EMA sits within. The data demonstrates that road freight for North West Leicestershire is more than double the East Midlands local authority average, demonstrating the role of EMA within the region and how it influences the pattern of road freight flows. These road freight flows play a crucial role in last mile delivery and air cargo trucking, ensuring that goods can be transported to and from the airport efficiently to meet required demand.

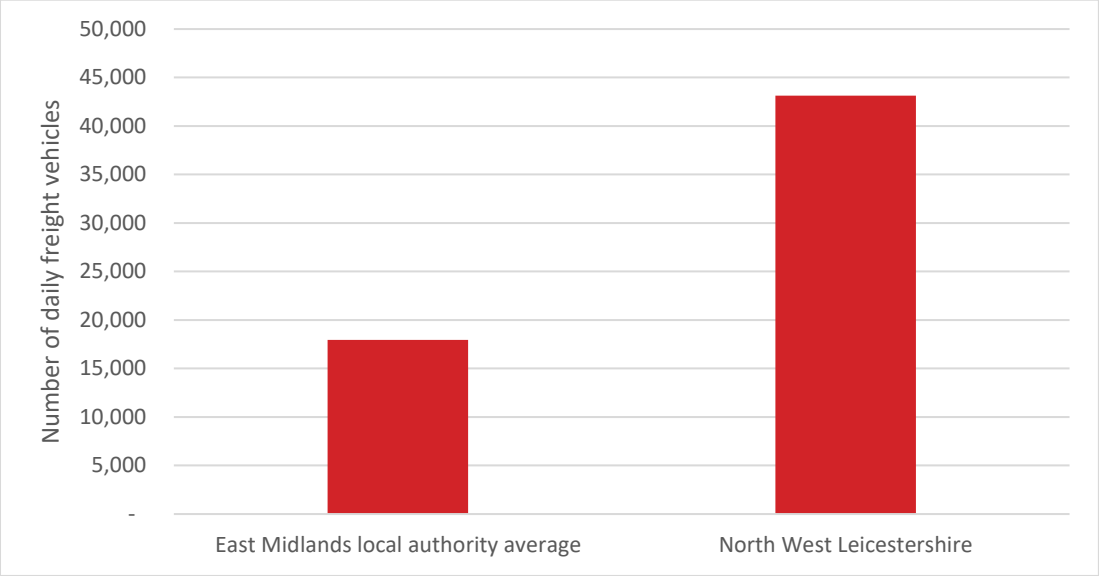


Figure 20 Origin road freight flows associated with EMA. (Source: MiHAM Data)

Water

3.3.68 Figure 21 presents the distribution of port-related freight jobs at the major ports of Boston (in the East Midlands region) and Grimsby & Immingham (just outside in Greater Lincolnshire). The data has been extracted using standard industrial classification (SIC) codes from Companies House data. It should be noted that even though SIC codes give a general indication of the nature of a business, it is possible that there are jobs at these ports in an area not related to the freight-related SIC codes selected in this analysis.

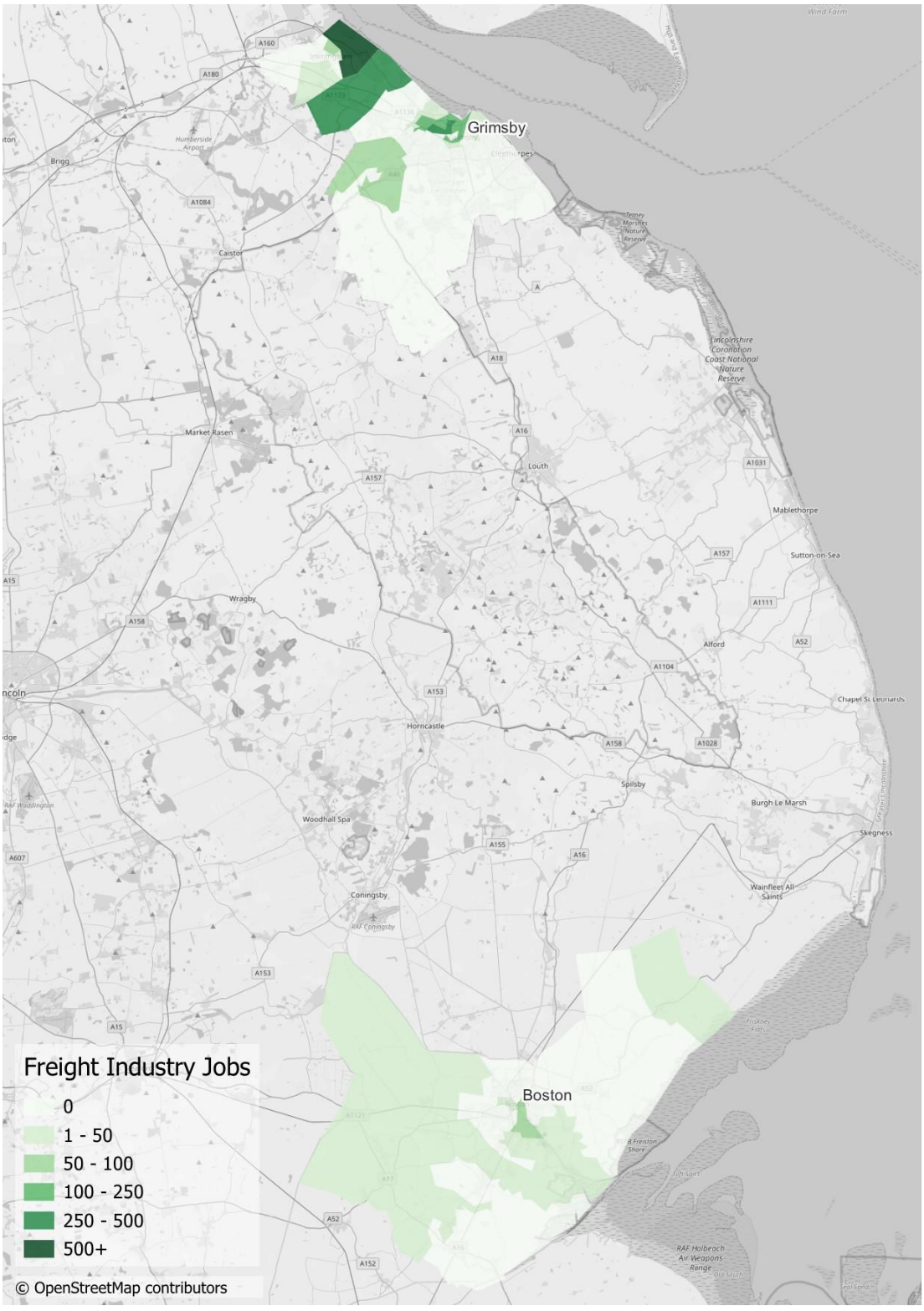


Figure 21 Port-related freight jobs at Boston and Grimsby & Immingham

3.3.69 Waterborne freight at ports in the region has seen an overall decline over the last ten years. Since 2015, freight tonnage has reduced by 32% from 2.4m tonnes to 1.6m. River Trent and Boston sit 40th and 42nd respectively in total tonnage across all major ports in the UK, and make up 0.4% of total UK tonnage (0.5% of the total in England). These proportions have

remained relatively stable since 2015 (0.4% of total UK and 0.6% of total England tonnage in 2015). It is worth noting, however, that the port of Grimsby and Immingham, which sits just outside the East Midlands region in Greater Lincolnshire and would be responsible for a significant amount of freight movement through the East Midlands, is the second largest port in the UK by total tonnage, representing 10% of total UK tonnage at ports (falling slightly from 12% in 2015).

3.3.70 Data for the East Midlands region includes the ports of Boston, River Trent and Sutton Bridge, and is presented in Figure 22.

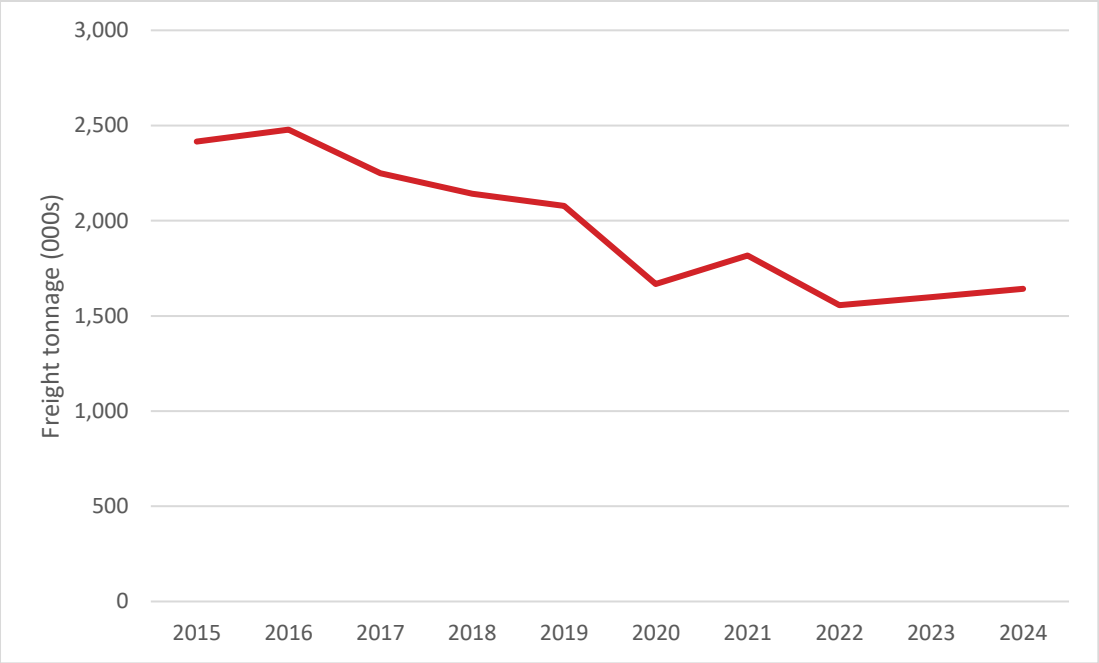


Figure 22 Freight tonnage at East Midlands ports (2015-2024) (Department for Transport)

3.3.71 By port, the River Trent has remained top in the region in tonnage, with just under 50% of the regional total, just above Boston. Sutton Bridge was closed in 2022 prior to being sold to new owners. It has since re-opened with volumes steadily increasing since.

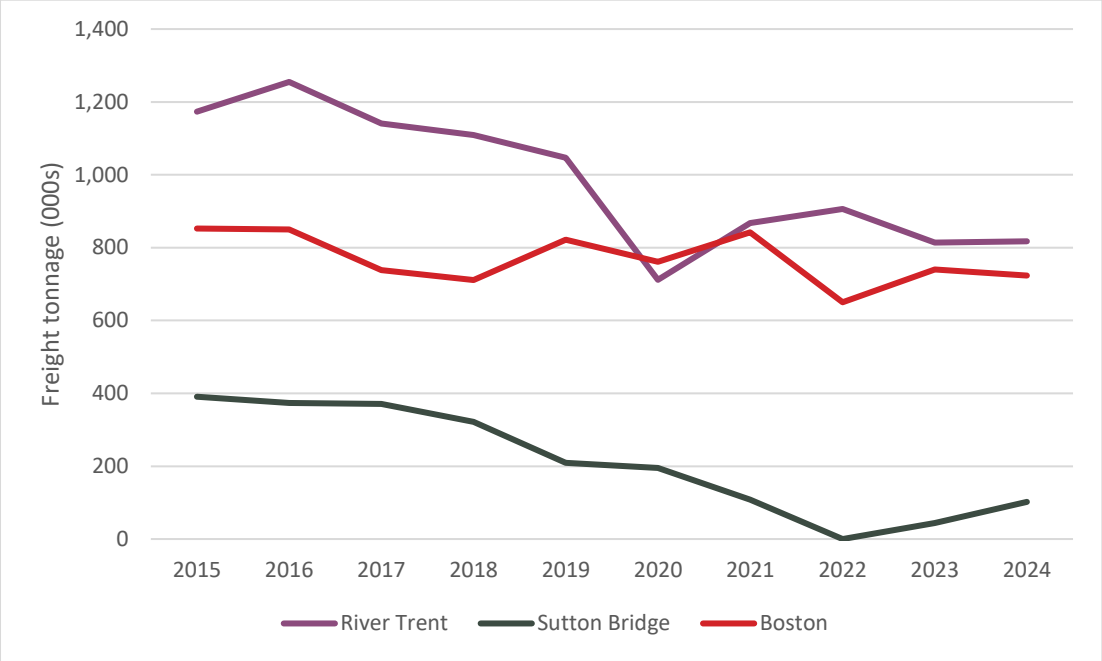


Figure 23 Freight tonnage by port (2015-2024) (Department for Transport)

3.3.72 In terms of goods moved on the River Trent itself, the vast majority of it (99% or more) has been seagoing since 2015, with internal tonne kilometres at zero in seven of the last ten years. Total freight traffic on the Trent in 2024 was 31% less than in 2015.

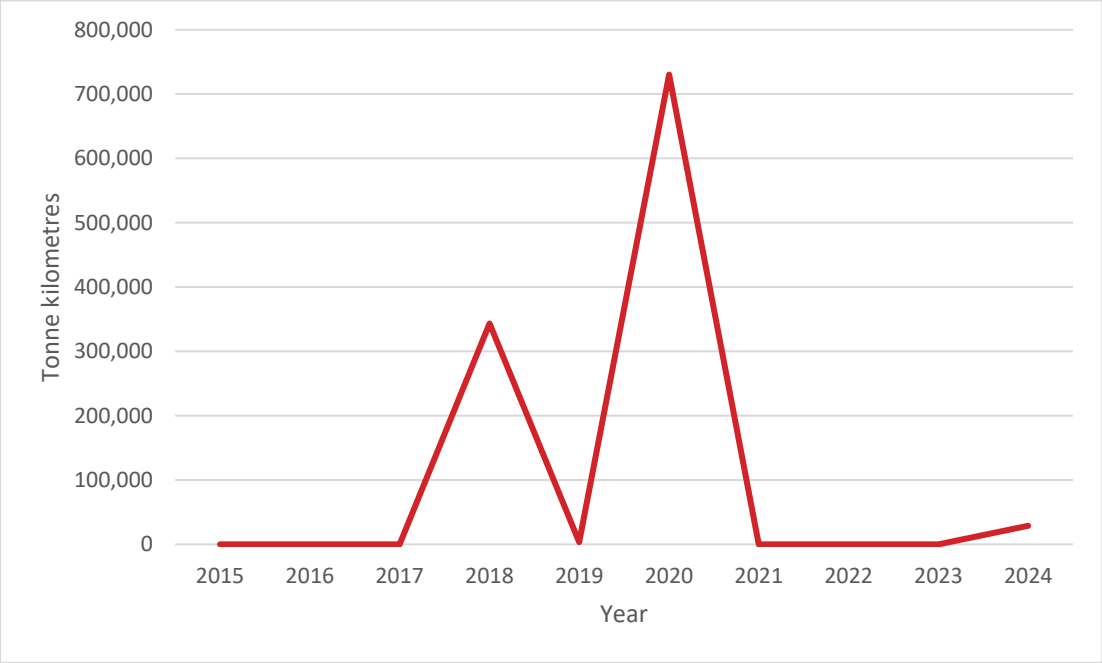


Figure 24 Internal goods moved on the River Trent (2015-2024) (Department for Transport)

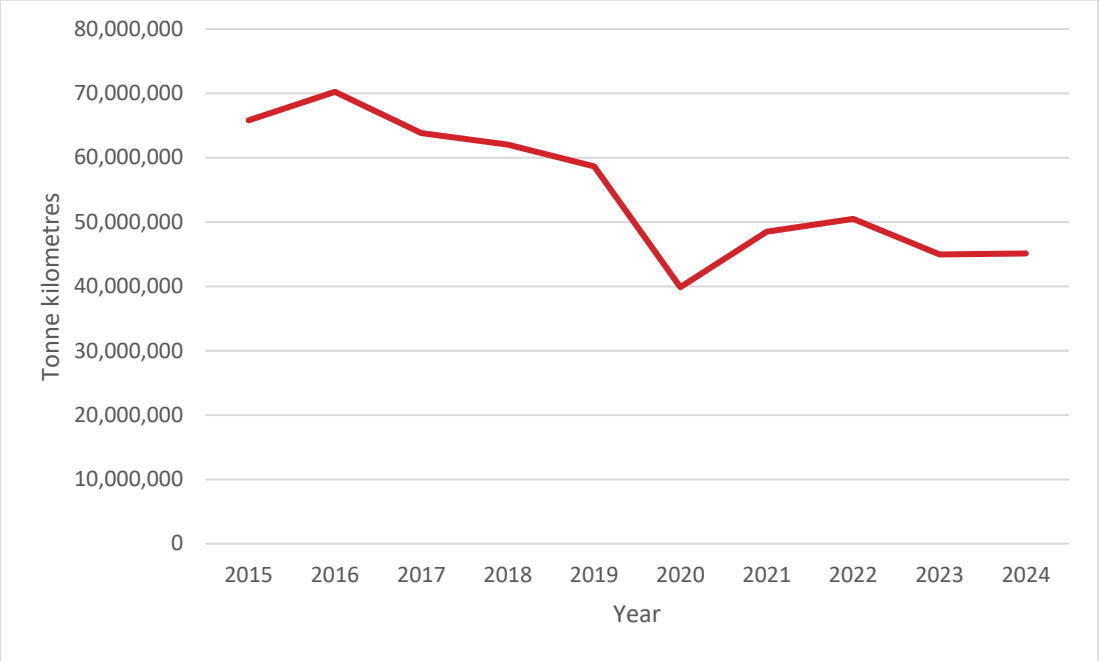


Figure 25 Seagoing goods moved on the River Trent (2015-2024) (Department for Transport)

3.3.73 Table 11, Table 12 and Table 13 present the distribution of port freight traffic by cargo type for 2024 for the ports of Boston, the River Trent, and, in Greater Lincolnshire, Grimsby & Immingham. Data was not available for Sutton Bridge.

Table 11 River Trent freight traffic by cargo type (2024) (Department for Transport)

CARGO TYPE	PERCENTAGE
Iron and steel products	59%
Other dry bulk	35%
Ores	5%
Coal	1%

3.3.74 Iron and steel products made up the majority of cargo at the River Trent port in 2024, with other dry bulk dominating the remainder. Iron and steel products also dominated at Boston, making up of 60% over freight traffic, followed by forestry products.

3.3.75 Grimsby & Immingham has a much broader range of cargo types than the ports in the East Midlands, with vehicle traffic (mostly road goods trailers), liquid bulk (mostly oil products) and dry bulk being the highest.

Table 12 Boston freight traffic by cargo type (2024) (Department for Transport)

CARGO TYPE	PERCENTAGE
Iron and steel products	61%
Forestry products	21%
Other general cargo & containers <20'	12%
Other dry bulk	3%
Other liquid bulk products	2%
Agricultural products (e.g. grain, soya, tapioca)	1%

Table 13 Grimsby & Immingham freight traffic by cargo type (2024) (Department for Transport)

CARGO TYPE	PERCENTAGE
All roll-on/roll-off non self-propelled traffic	31%
Oil products	26%
Other dry bulk	12%
Crude oil	7%
All roll-on/roll-off self-propelled traffic	6%
Ores	5%
All container traffic	4%
Coal	4%
Other liquid bulk products	2%
Iron and steel products	1%
Liquefied gas	1%
General cargo & containers <20'	1%
Agricultural products	1%

3.4 Constraints and performance

Constraints

Rail

3.4.1 Analysis of the Midland Mainline by Network Rail on constraints to freight services has identified the following:

- Electrification and power supply – no electrification at the following locations constrains freight performance and decarbonisation objectives:
  - North of Wigston
  - Between Birmingham and Derby/Trent junction
  - Felixstowe to Midlands freight route
- Limited track and junction capacity:
  - Derby to Birmingham and at Stenson Junction
  - Trent and Sheet Stores Junctions
  - Leicester area
- Line speeds:
  - Slow lines south of Kettering North junction causes conflicts with passenger services
- Loading gauge constraints currently means that the MML cannot be used by class 4 freight traffic to relieve or act as a diversionary route for congested East and West Coast Mainlines. Particular constraints are at the following locations:
  - Between Trent and Syston junctions
  - Corby to Manton Junction
  - Kettering to Wigston Junction
  - Between Bedford and Radlett
  - Between Cricklewood and Carlton Road junctions

3.4.2 Furthermore, the Lincolnshire Rail Strategy has identified the following infrastructure constraints to freight services in the region:

- Barton-upon-Humber – Harborough – Cleethorpes:
  - Volume of freight services into Immingham constrains what is primarily a single track line
- Grimsby (Cleethorpes) – Market Rasen – Lincoln – Nottingham – Leicester:
  - One freight path per hour across the Newark Flat Crossing, alongside a passenger path per hour, constrains expansion of operations
- Doncaster – Lincoln – Sleaford – Spalding – Peterborough:

- The lengthy signalling headway on the line south of Lincoln reduces flexibility and provides limited opportunities to regulate freight in this area

- Sheffield – Lincoln:

  - There may be a requirement for additional freight traffic on this corridor to reduce pressure on the Newark Flat Crossing and at Lincoln station

Road – the A1 corridor

3.4.3 As noted in 3.3.3, the A1 is a key corridor for freight in the region and plays an oversize role compared to other corridors. However, it is also a corridor that suffers from a number of infrastructure constraints and safety concerns which limit its performance as a freight corridor. These constraints include:

- Sub-standard junctions and right-turn movements creating conflicting movements.
- Gaps in the central reservation encouraging crossing movements and abrupt turning movements.
- Lack of alternative diversion routes during incidents and closures.
- Overtaking HGVs causing congestion due to the dual carriageway infrastructure.

3.4.4 National Highways' programme of gap closures on the A1, which began in July 2025, is seeking to address some of these constraints by closing the gaps in the central reservation. Many of these are used by agricultural vehicles, single private properties, and by road users performing right-turns across traffic or U-turns. Between Little Ponton and Colsterworth in Lincolnshire, 13 gaps were closed in 2025. A further 46 gaps are currently being considered between Blyth and Stamford, and across Nottinghamshire, Lincolnshire and Rutland.

3.4.5 Closure of these gaps will improve the operation of the A1 as a strategic freight route, improving safety, journey time reliability, and reducing the need for future road closures.

Performance on the rail network

3.4.6 Network Rail analysis demonstrates that technical and fleet delays are the most common cause of freight service delays, closely followed by terminal and yards. The data is presented in Figure 26.

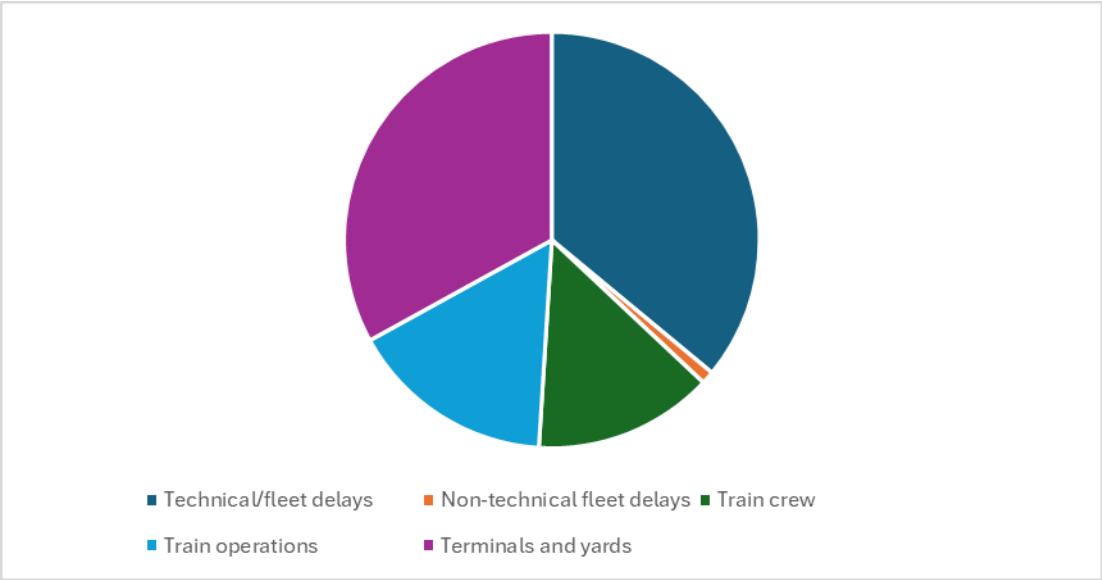


Figure 26 Causes of freight service delays in the East Midlands

3.4.7 Performance data for the whole MML route suggests that freight services are above industry targets and have been improving since 2023/24. For the most recently available data, cancellations are at 1% (compared to 5.5% towards the end of 2023/24).

3.5 Summary

3.5.1 The above analysis has highlighted the following key messages for the current situation regarding freight in the East Midlands:

- **Jobs in freight:**
  - There is a high concentration of jobs in freight in South Holland in Lincolnshire, High Peak in Derbyshire, and related to the Daventry International Rail Freight Terminal in West Northamptonshire.
  - The 'logistics triangle', particularly around East Midlands Gateway and Toton Yard also has a high concentration of jobs in the freight sector, making use of its central location in the country and in the strategic road and rail networks.
- **Freight movements by road:**
  - Freight flows by road are dominated by internal movements, making up 82% of all freight flows in the region.
  - The neighbouring West Midlands is the dominant movement for flows in and out of the region (likely utilising the A38, A42 and M69 corridors), followed by Yorkshire and the Humber (M1 and A1), and the East of England (A1, A46/A47 and A17).
  - Morning peak flows are generally higher than the evening peak.
  - Freight flows that remain internal to the East Midlands primarily start or end in Derby, Leicester, Lincoln, North West Leicestershire, Northampton and Nottingham.

- **Freight movements by rail:**

  - Freight services are primarily operated by DC Rail, DB Cargo and Legge Infrastructure Services, the latter headquartered in the region in Nottingham.
  - The most common origin or destination locations for freight services in the region are Mountsorrel Sidings, Toton North Yard and Hope (Earles Sidings) FHH.
  - The freight termini at Immingham HIT and Doncaster Up Decoy are the most used termini outside the region for services that operate inside the East Midlands, with Tapton Junction the most used entry and exit point on the regional border. Grindleford on the Hope Valley line receives significant freight traffic operating to and from High Peak.
  - North Stafford Junction and Wellingborough are both key entry and exit points at the edges of the region used for freight heading south and west.
  - Rail freight services in the region most commonly carry construction materials heading to Mountsorrel and Hope (Earls Sidings), followed by marshalling and engineering operating out of Toton.

- **Freight movements by air:**

  - East Midlands Airport has consistently operated above the UK average of freight cargo tonnage since 2018. This gap grew markedly during the COVID-19 pandemic but has since closed.
  - EMA handles around one fifth of all air freight in the UK and handles more cargo than all non-London airports combined.
  - The impact of freight through EMA is highlighted by road freight flows in and out of North West Leicestershire, which is more than double the regional average.

4. ALIGNMENT WITH PRIORITIES AND GAP ANALYSIS

4.1.1 There are a number of regional and local priorities around the development of freight which are described below.

4.2 Proposals from the Lincolnshire Rail Strategy

4.2.1 The Lincolnshire Rail Strategy has identified a number of opportunities to develop rail freight across the county.

- **South Lincolnshire Rail Freight Hub** – this would serve the UK's largest food processing and logistics cluster
- **Gainsborough-Northorpe doubling** to increase freight capacity on the route between Gainsborough and Barnetby, increasing capacity for freight traffic between Immingham and South Yorkshire
- **Reduce freight services over Newark Flat Crossing** and into Lincoln
- **Re-signal Leicester-Peterborough-Felixstowe to Midlands**, a key freight route

4.3 Upgrade of Nottingham-Newark-Lincoln

4.3.1 The Nottingham – Newark – Lincoln paper highlights a number of interventions that would support freight:

- **Electrification** would be the first step to providing an electrified route to Immingham Docks
- **Lincoln area infrastructure upgrade** to allow the handling of increased freight services diverted from the ECML

4.3.2 Both of these points act as enablers for increasing the efficiency of freight movements and, in tandem with other changes, might support mode shift.

4.4 Gap analysis

4.4.1 In principle, the current transport infrastructure in the East Midlands should be well-placed to support the above. As the data in section 3.3 has shown, the area is already a hub for freight and logistics and its central position in the UK and its strong strategic transport links by rail, road and air make it uniquely positioned to specialise in freight.

4.4.2 Road haulage is already in a strong position to meet many requirements but does so in a way which, whilst financially efficient, may not be the most sustainable or make the best use of scarce road capacity. In contrast, air freight will always fill a very limited role for high value, low volume and international traffic.

4.4.3 In contrast, the rail sector represents a way of providing bulk freight movements in a sustainable way, but at the current time is operating only in selected markets. The majority of flows are in two market areas, construction and maritime-associated intermodal traffic. The construction market plays heavily to the strengths of rail, involving the movements of large quantities of very heavy products over a medium to long distance, often originating in areas with poor road access, such as the Peak District.

4.4.4 Similarly, long distance trunk flows of intermodal traffic from major ports such as London Gateway, Southampton and Felixstowe also provide markets where rail is a strong competitor to road, though in this market there is a greater sensitivity to distance than there is in the construction sector. As the economy has changed, so too has the nature of rail freight, with markets such as coal having disappeared entirely and flows related to steel and oil having declined. All of these were areas where rail was historically very strong, and all represented primary products feeding into production processes. In contrast, the available markets are more likely to be the outputs of production and distribution process with internal intermodal, high value low volume goods, and time sensitive traffic (including both bulk and non-bulk flows) representing future markets.

The negative impact of infrastructure constraints on rail freight terminal operations and capabilities

Analysis of the freight flows at two major terminals in the region – ***East Midlands Gateway (EMG)*** *and* ***Daventry IRFT*** *– indicate the potential impact that* ***gauge clearance constraints on the Midland Mainline*** *may be having on the flows EMG is able to operate. Traffic at EMG is strongly* ***port-focused****, with most flows to and from the major ports of Felixstowe and, to a lesser extent, London Gateway. Daventry, on the other hand, serves a* ***diverse range of destinations*** *(and therefore commodity types), with connections to locations on the coast (such as Tilbury, Dollands Moor and Wentloog), longer distance terminals (Coatbridge, Trafford Park and Doncaster iPort), as well as some short distance flows (such as Rugby).*

4.4.5 Capturing these markets requires the rail freight sector, and the rail industry as a whole, to evolve to provide a more competitive offering against road haulage to avoid rail occupying a space where it is used by customers in the markets described above as a form of social value or "greenwashing".

4.4.6 To address this, the rail sector needs to address a number of gaps that currently hinder the efficiency of rail freight. These include:

- **Low average speeds driven by a lack of capacity** for freight traffic amongst passenger traffic, causing freight traffic to have to wait in loops for significant periods, extending journey times and increasing costs
- Improving the performance of the rail network so that customers could have **greater confidence in the movement of time sensitive goods**
- **Increasing the coverage of rail freight terminals** to help capture more commodities and serve a wider geography
- **Gauge clearance** on key routes

4.4.7 Dealing with the above will help to address issues around suppressed demand, as even relatively modest changes in rail journey time and the ability to provide paths can start to open new markets or expand existing ones. An example could be the East Midlands Gateway terminal which is focussed on movements to and from the major ports, but which lacks any flows to non-port destinations such as Scotland, which other terminals such as Daventry do support.

4.4.8 The first two points are interwoven with issues the passenger network faces. A lack of track capacity and mixed traffic routes, for example on the Birmingham – Derby route, hinders the development of both markets. In the case of freight this manifests itself with journey times

that are extended whilst freight is recessed for passenger traffic. This issue was addressed on the East Coast Main Line by upgrading the GNGE Joint Line via Lincoln, allowing freight traffic to be diverted. Whilst this increases the distance travelled it has a limited impact on journey times and increases capacity substantially.

4.4.9 Rationalised signalling can also constrain capacity with the limited number of block sections between Peterborough and Leicester limiting the capacity for both passenger and freight traffic.

4.4.10 The freight industry is moving to partially address this issue with the use of more powerful hybrid locomotives, with two operators introducing tri-mode electric-battery-diesel locomotives, replacing conventional diesel locomotives. These are able to accelerate trains more effectively and make better use of the speed profile of a route, although they are most effective when operating with electric traction. In the case of the East Midlands, this again highlights the limitations of not electrifying the Midland Mainline in full.

4.4.11 The use of more powerful locomotives will also allow longer and heavier trains to be operated, and whilst the aim of capacity enhancements should be to reduce the need for loops, those that remain should be designed to accommodate longer trains in excess of 775m.

4.4.12 Addressing the issues above contributes to making rail freight more competitive, which in turn can support the development of new flows. For the East Midlands, the markets where there might be the greatest opportunity are:

- Increase in intermodal flows from ports to the East Midlands
- Development of more internal flows from logistics hubs in the East Midlands to other parts of the country

4.4.13 Perceived and actual network performance is also an issue. The rail network has over the last 25 years moved away from the movement of time sensitive goods for a variety of reasons and to return to their movement requires a high level of confidence in network reliability, both from operators and clients. A good example of this is the proposed South Lincolnshire Rail Freight Hub, which would be based around the South Lincolnshire food cluster. The movement of any perishable products or anything in the commercial food chain that operated on a “just in time” basis would require services to be operated reliably.

4.4.14 Improving performance may also open up a market for high value low volume traffic that could travel on passenger trains. This is an area that the railway historically served comprehensively, both through Royal Mail traffic, but also a wider parcels network. Whilst road haulage impacted this market, the rise in the number of small packages being conveyed presents an opportunity for movement by train especially to city centres. Companies such as Varamis have experimented with full train loads in this market, running an overnight Glasgow – Birmingham service, but movement by passenger train may be more efficient by allowing a network of high frequency services to be used. Finding a way to tie this into East Midlands freight and logistics hubs may provide a marketable product for rail, with major cities such as London, Birmingham, Sheffield and Leeds all being within two hours’ travel time, and even cities such as Bristol being less than three hours away.

4.4.15 The East Midlands has a number of rail freight terminals, though there are some gaps in coverage. For example, Lincolnshire lacks any form of intermodal terminal, though the proposed South Lincolnshire Railfreight Hub would address this.

4.4.16 Gauge clearance is one of the most significant issues, and the Midland Mainline in particular is constrained by a lack of gaps in gauge clearance for larger containers, meaning that they have to travel on specially designed pocket wagons which reduce the number of containers that can be moved in each train. Issues around gauge clearance are often (though not exclusively) caused by the dimensions of overbridges. The work required to deliver electrification would also deliver gauge clearance and, as such, the impact on freight traffic is a further side effect of the cancellation of the Midland Mainline electrification programme. Addressing gauge clearance issues will assist with the development of rail freight in the East Midlands but will also help the freight sector more widely as it would support the re-routing of services from other routes.

4.4.17 Key routes requiring gauge clearance include:

- Midland Mainline south of Derby – providing greater flexibility and simplifying access between London and East Midlands Gateway
- Derby – Stoke – which in combination with Stoke – Crewe would provide a gauge cleared route to Scotland via the West Coast Mainline

5. FUTURE DEVELOPMENT

5.1 Future rail investment

5.1.1 The gaps identified above for rail highlighted a number of themes that are complementary to the development of the passenger network, notably capacity and electrification. For example, schemes to enhance capacity such as those associated with MYNE would help to increase freight capacity on key routes such as Birmingham – Derby. However, electrification would be the most significant way of enhancing freight traffic.

5.1.2 Electrification would allow freight traffic to accelerate better and maintain speeds more consistently, using capacity more efficiently and helping to reduce journey times both directly and as a result of the reduced need for services to be looped to allow passenger trains to overtake. The gaps in electrification in the East Midlands present a barrier for both local traffic and traffic passing through the area. The completion of electrification from Birmingham via Derby/Toton, and Sheffield/Barrow Hill to the East Coast Mainline and Leeds and Midland Mainline electrification from Wigston to Derby would, along with East-West Rail upgrades allow an increase in the number of freight paths and simultaneously address gauge clearance issues.

5.1.3 Exploring the concept of high value low volume parcels traffic by both dedicated services and passenger services would represent a new market for rail in the East Midlands and would link to the presence of logistics hubs and potentially provide a more sustainable approach to moving these consignments to city centres. The emergence of GBR as a single body managing passenger rail services may help this as an effective approach is likely to involve the use of a network of passenger services with GBR able to plan this in a more coordinated way than might previously have been possible.

5.1.4 As identified in the Coventry–Leicester–Nottingham rail study there would also be benefit in upgrading the Coventry–Nuneaton and Nuneaton–Leicester routes, including providing grade separation at Nuneaton and gauge clearance along both routes. This would improve links between the East Midlands Freeport and Portbury without having to route services via Birmingham, which absorbs scarce capacity and elongates rail journey times, increasing costs.

5.2 Future roads investment

5.2.1 Responsible for the strategic road network (SRN) in England, National Highways publishes a Road Investment Strategy (RIS) every five years. RIS 2, for the Road Period (RP) 2 (2020 to 2025), set out a number of schemes to be delivered for the East Midlands. Subsequent delivery plan updates, the 2025 Spending Review, and shifting priorities in the run-up to the publication of RIS 3 in March 2026, have necessitated changes to some of these plans. However, a number of improvements have already been delivered, and will be delivered in the near future, for the benefit of strategic road freight movements in the region.

5.2.2 These plans are summarised in Table 14.

Table 14 Status of major National Highways SRN upgrades in the East Midlands (RIS)

SCHEME NAME	DETAIL AND BENEFITS	INITIAL DELIVERY PLAN 2020-25	CURRENT STATUS
A52 Nottingham junctions	Signalisation and junction reconstruction at several junctions. Reduced congestion and delay on key east-west link	To be delivered in RP2	Six junctions delivered, Nottingham Knight and Wheatcroft junctions to be delivered by 2027 (RP3). Continuing construction confirmed in RP3 in RIS 3.
A38 Derby junctions	Upgrades to junctions west and north of Derby city centre. Improved journey times and reliability between Birmingham, Derby and M1	To be delivered in RP2	Funding confirmed in 2025 Spending Review, development and survey work ongoing
M1 junctions 13 to 19	Upgrade to All Lane Running (ALR), £373m. Improved traffic flow and reduced congestion on primary north-south freight corridor	To be delivered in RP2	ALR delivered between junctions 13 to 16 in 2023. Scheme at M1 junction 13 confirmed in RIS 3 for the RIS 4 pipeline, subject to further business case development.
A45/A6 Chowns Mill junction	Upgrade to roundabout junction. Improved journey times and safety	To be delivered in RP2	Delivered in 2021
A5 Dodwells to Longshoot	Upgrade from single to dual carriageway. Improved traffic flow and journey time reliability	To be delivered beyond RP2	Cancelled in Delivery Plan Update 2021-22 due to poor value for money. Confirmed in RIS 3 for the RIS 4 pipeline, subject to further business case development.
A46 Newark bypass	Upgrade of 6.5km from single to dual carriageway. Improved journey time and reliability along A46 corridor between Lincoln and Leicester. RIS 3 states the investment will support the manufacturing and logistics sectors and improve access to the Humber Freeport.	To be delivered beyond RP2	Development Consent Order approved by Secretary of State in October 2025. Investment confirmed in RIS 3 in March 2026, with start of works dates to be published in the Delivery Plan later in 2026.
A5 Gibbet Hill	Supporting significant planned commercial and housing growth in the region.	N/A	Confirmed in RIS 3 for the RIS 4 pipeline, subject to further business case development.
A46 concrete reconstruction schemes	Full reconstruction of a part of National Highways' legacy concrete network.	N/A	Confirmed in RIS 3 in the Large Renewals – Concrete Roads programme.

SCHEME NAME	DETAIL AND BENEFITS	INITIAL DELIVERY PLAN 2020-25	CURRENT STATUS
M1 junction 28	Junction improvements to support growth by reducing congestion on the M1 and A38.	N/A	Confirmed in RIS 3 for the RIS 4 pipeline, subject to further business case development.
A14 junction 10a	Junction improvement to support growth.	N/A	Confirmed in RIS 3 for the RIS 4 pipeline – to begin delivery in RP 3, subject to third party funding and obtaining the necessary planning approvals.

5.2.3 A wider issue relates to the need to decarbonise road haulage. Whilst this could be achieved by some level of mode shift, much of the current road haulage sector will have to move towards electric power through a combination of battery and potentially overhead electrification of motorways. The latter introduces some level of performance risk to the haulage sector as the level of usage of overhead wires on motorways may make them more susceptible to de-wirements etc than the equivalent rail infrastructure, which itself can be unreliable at times.

5.2.4 RIS 3, published in March 2026, stated that National Highways will support industry to roll-out electric HGV charging across the network and continuing zero-carbon HGV trials.

5.2.5 The RIS 3 investment plan for the Midlands region (which includes schemes in the West Midlands) is presented in Figure 27. The schemes in the East Midlands numbered on the map are as follows:

- 1 – A38 Derby junctions
- 2 – A46 Newark bypass
- 4 – A5 Dodwells to Longshoot
- 5 – A5 Gibbet Hill
- 7 (light green)– M1 junction 28
- 7 (dark green) – A52 Nottingham junctions
- 7 (purple) – A46 concrete reconstruction
- 14 (light green) – A14 junction 10a
- 14 (blue) – A45/A6 Chowns Mill junction

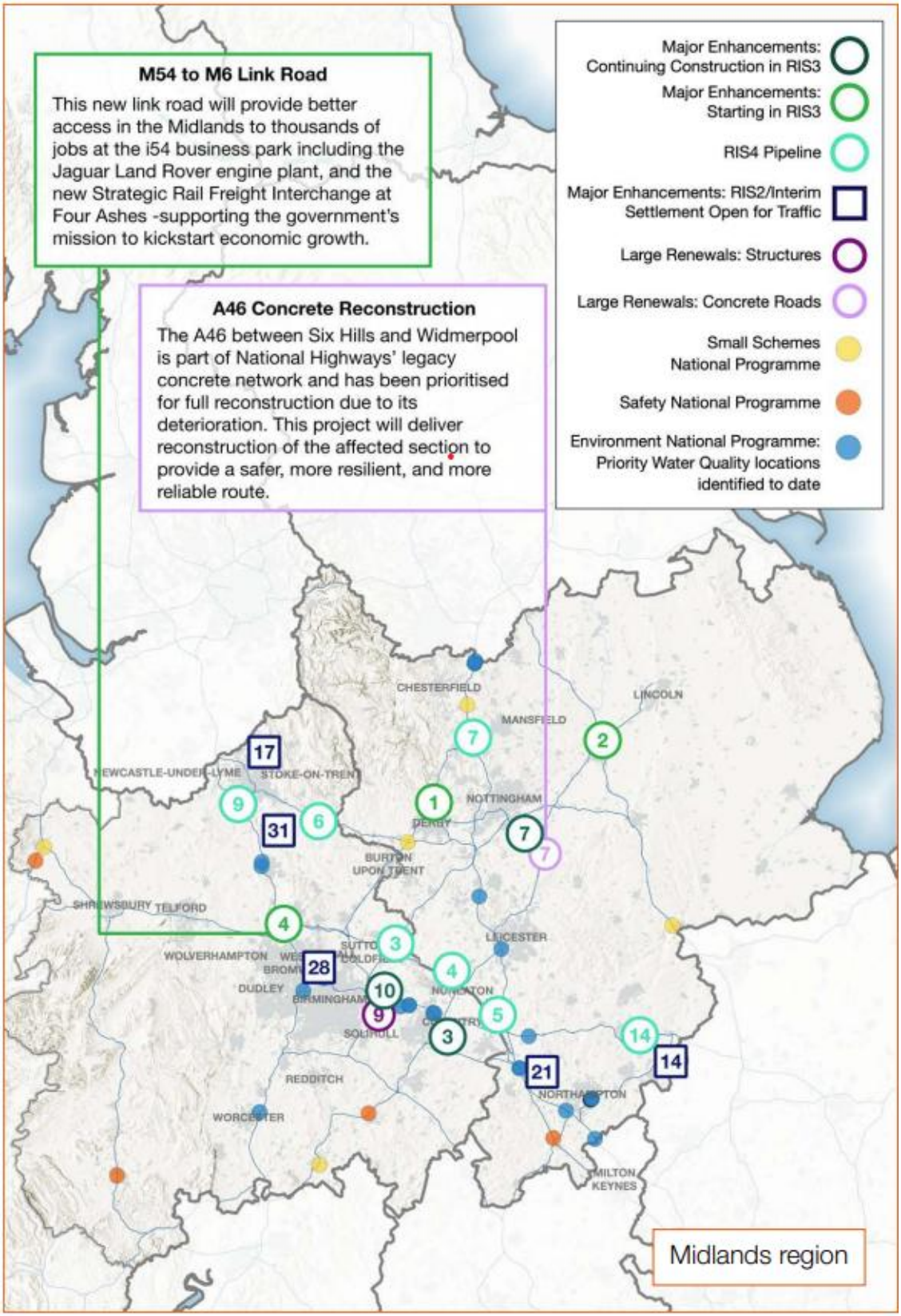


Figure 27 RIS 3 investment plan for Midlands region (National Highways)

5.3 Future growth and development at EMA

5.3.1 The draft 2025 East Midlands Airport Sustainable Development Plan sets out a vision for developing the airport over the next 20 years. The Plan was consulted upon between March and June 2025, with the final Plan awaiting publication.

5.3.2 The Plan sets out a vision for EMA to be 'the UK's global gateway for air cargo, enabling seamless trade.' Amongst other aims relating to passenger growth, the Plan states that to achieve the vision it aims to:

- Make the case for improved connectivity to/from cargo catchments
- Capitalise on EMA's place as the UK's most important airport for express air cargo

5.3.3 The growth of EMA's cargo operations is supported by national aviation policy, which encourages the operators of airports outside the South East to make the best use of their existing runway capacity[3]. The Plan quotes independent analysis which suggests that almost **half of companies expect to increase their use of express freight services** in the future, and that there will be a **strong growth of express freight at EMA over the next 20 years** given the airport's strategic position to take advantage of this growth.

5.3.4 It is anticipated that **cargo activity could reach 800,000 tonnes per year** in the period up to 2040, **doubling its current operations**. It is expected that cargo movements will also continue to grow, impacting the surrounding road and rail networks, but at a slower rate to tonnage through the introduction of new and larger cargo aircraft. Therefore, while road and rail movements will not quite grow at the rate of cargo tonnage, the significant increase in freight operations planned over the next 10-15 years will result in a marked increase in associated road and rail traffic.

5.3.5 While the Plan states that the majority of cargo operations are at night, between the early evening and the early morning, with cargo staff working overnight shifts that avoid peak period traffic, this increase in freight operations in future years is likely to place significant additional pressure on surrounding road and rail networks.

5.3.6 In terms of rail, a priority for the airport is, at least, to maintain freight capacity at the existing connections at East Midlands Gateway, Ratcliffe-on-Soar, and East Midlands Intermodal Park, and to improve capacity where necessary.

5.3.7 Regarding road connections, EMA states that a priority for developing the airport and the nearby Freeport should be enhancing access from the **A453 and M1 junction 21a in particular**. Furthermore, given that the majority of cargo operations occur outside of the traditional peak periods, **managing roadworks and closures** is crucial to preventing significant impacts on freight operations at EMA.

5.3.8 In terms of future development at the airport, the Plan suggests that future growth to the 800,000 tonne target can largely be achieved by **optimising current facilities and expanding existing cargo hubs within the existing operational area**. Through utilising available airport land and safeguarding it for new cargo development, there are further proposals to develop:

[3] Beyond the horizon: The future of UK aviation – making best use of existing runways (2018)

- An additional cargo apron, providing up to 20 more multi-use stands capable of handling the largest commercial aircraft.
- An additional 8-10 stands on safeguarded land adjacent to the UPS hub.

5.4 Future growth in rail freight

5.4.1 In 2023, the UK government committed to a 75% increase in rail freight by 2050, achieved primarily by using existing paths more intensively, hauling heavier trains, and developing new terminals. This is a target that the East Midlands is central to delivering due to its geographic importance for intermodal and construction traffic.

5.4.2 Based on forecasting work undertaken by Network Rail in 2024[4], it is likely that, assuming this 75% growth, freight traffic would be expected to significantly increase around Syston Junction and in the Derby area, as well as between Bedford and Leicester and between Clay Cross and the Hope Valley.

5.4.3 There is also the potential that growth in rail freight could exceed government targets, particularly as other major lines, such as the WCML and ECML, become capacity-constrained by increased passenger flows. Furthermore, if existing gauge constraints are addressed in the future on the MML, potential new routes, such as Southampton to Yorkshire and London Gateway to the Midlands, would be unlocked.

5.4.4 There are other developments that could also contribute towards a greater increase in freight. Ambitious national housing targets are expected to drive an increase in construction materials flows, and the push for more sustainable fuels such as hydrogen and captured carbon may generate further demand. Furthermore, new electric arc furnaces in Port Talbot and, potentially, Scunthorpe, could result in new flows related to these developments across the region.

5.4.5 The growth of terminals in the region may also be driver of increased freight flows, and there are potential new terminals at various stages of development at Hinckley, the closed Ratcliffe and Willington power stations, and Corby.

5.4.6 All of the above is likely to impact, in particular, services on the Hope Valley Line and between Leicester and Syston Junction, and suggests potential priorities for delivery in future years to accommodate this potential growth would need to facilitate greater movements in these areas.

5.5 Industry priorities

5.5.1 Freight bodies in the UK have consistently called for targeted investment and policy support in the East Midlands to unlock capacity, reliability, and connectivity for road, rail, and multimodal freight.

5.5.2 Logistics UK, one of the largest business groups in the UK with members from industries across all modes, advocates measures that remove day-to-day pinch points and improve journey

[4] Midland Main Line and East Midlands Route Study – Railway Investment Options. Network Rail, 2026.

times for freight operators. In its 2024 Midlands Manifesto[5], published in the lead-up to the UK general election, Logistics UK states that the region is being back by transport congestion and a lack of maintenance of its transport infrastructure. It also states that the region should be part of a national logistics network, backed by reforms to planning, long-term infrastructure strategies and short-term delivery plans.

5.5.3 The manifesto sets out its infrastructure priorities for the region as:

- Enhancements to the A5.
- Delivery of the Midlands Rail Hub.
- Investment in the Syston-Trent gauge enhancements.
- Reversal, or replacement with an alternative, of the northern leg of HS2 to deliver capacity for rail freight on the existing network.
- Upgrades to the A14 and intermodal operability improvements on the Midlands-Felixstowe corridor.

5.5.4 The Chartered Institute of Logistics and Transport (CILT) prioritises an integrated freight system encompassing all modes and movements, underpinned by coherent planning policy and long-term investment. In its recent review of infrastructure investment[6], CILT notes that freight and logistics is an entirely private sector activity that is dependent on public sector investment into road and rail infrastructure. It therefore advocates that priority should be given to those schemes that demonstrate the best value for money, whereas many projects in passenger rail and other transport sectors with poor BCRs have been authorised.

5.5.5 CILT also highlights, in its Freight Electrification Map[7], a number of freight corridors that should be prioritised for electrification, as well as less than 60 miles of 'infill' sections that, if electrified, would allow electrified freight to travel long distances, including through the East Midlands, and allow approximately 2m train miles per year to be decarbonised. Out of these key 'infill' sections, the ones of relevance to the East Midlands are:

- Between Birmingham and Nuneaton
- Between Ipswich and Felixstowe
- Between London Gateway and south of Stanford-le-Hope

5.5.6 The longer-term priority corridors in the East Midlands advocated by CILT are:

- Peterborough-Lincoln-Doncaster
- Doncaster-Immingham
- Birmingham-Leicester-Peterborough-Stowmarket
- Birmingham-Doncaster via Alfreton and Chesterfield

5.6 A longer-term ambition

5.6.1 Whilst the sections above present a range of potential improvements there is a wider opportunity for a shift in policy to more actively promote sustainable freight movements. In

[5] Logistics UK Midlands Manifesto, March 2024.
[6] Reviewing Infrastructure Investment - Maximising its Purpose and Value, CILT, February 2025.
[7] CILT Freight Electrification Map, March 2023.

particular, there is a contrast between the passenger and freight markets in terms of the supports and incentives provided. Rail passenger services have long been recognised as having a wider social, economic and environmental value that has justified varying level of financial support for operations. In contrast rail freight has long been required to operate entirely commercially, even prior to the privatisation of British Rail in the 1990s. Historically, the case for this is to provide a level playing field with other modes, notably road haulage, with an overarching view that competition ultimately delivers the best outcome for consumers.

5.6.2 There is however a case for arguing that greater support is justified to drive change to support wider policy ambitions around decarbonisation, decongestion and to promote better integration between modes. The type of support required is more likely to be in the form of support for capital investments in terminal, capacity and facilities rather than revenue support for specific services (other than perhaps as a pump priming initiative). A particular example is around rail accessible warehousing – whilst the East Midlands has seen distribution hubs based around both road and rail (at Daventry for example), there are opportunities for more across the region to promote mode shift to rail. Similarly, the proliferation of parcels movements because of the rise of internet shopping has seen an increase in both HGV and LGV movements and, as outlined elsewhere in this document, this is where rail could have a strong role in promoting mode shift both through dedicated parcel movements but also through passenger services. This is an area with potential, but again requires some level of support to develop the ambition to a point where it becomes scalable.

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