
WELSH PORTS

NATIONAL AND
REGIONAL
ENGINES
FOR
GROWTH

British
Ports
Association

UKMPG

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THE WELSH PORTS GROUP

REPRESENTING A VITAL SECTOR

Ports in Wales are vital international gateways and hubs of both regional and national employment. The Welsh ports industry is strategically and financially independent of Government and operates under a unique regulatory and planning environment. The Welsh Ports Group is the only forum representing the views of this important sector in Wales. Coordinated by the British Ports Association and the UK Major Ports Group, it holds regular meetings with the Welsh Government and other key decision makers.

The Welsh Ports Group includes all the main cargo handling ports in Wales as well as a wide range of smaller ports focussed on marine leisure, recreation and fishing activity. The current chairman of the Group is ABP's Port Manager of Cardiff and Barry, Callum Couper and he helps to drive forward the Group's agenda and represents the industry at a number of forums and levels.

PORTS AND DEVOLUTION

The Wales Act 2017 includes proposals to devolve most ports policy functions to the Welsh Government. During the Act's passage through Westminster the Welsh Port Group's view on this was neutral however we are now working with the Welsh Government and looking at the potential opportunities for the sector. What really matters is the policy framework.

We expect this to translate into a stable and market-led Government approach to ports policy, maintaining the mixed ownership model and a level playing field for all Welsh ports without disadvantaging them against ports outside of Wales. The framework which has underwritten ports policy in England and Wales to now is a good template for a Welsh strategy.

The Welsh Government has given positive indications that it will maintain the market-led approach to ports and we are keen to open a dialogue.

Also of interest are the arrangements and resourcing of a new ports unit in Wales which will have a key consenting and governance role, overseeing Harbour Revision Order applications and ports legislative issues. We have a good dialogue with officials in Wales and we look forward to continued discussions on these points with our colleagues in the Welsh Government.

Economic growth in Wales is vital and ports provide hubs of activity. Ensuring ports have sufficient access to development land and limiting external encouragement by other non-port related uses will mean that Welsh ports are ready to respond to new opportunities.

The Group is also following other initiatives such as the recent Welsh Government 'Port Development Fund' scheme closely to ensure Welsh ports explore new research and development opportunities.

BREXIT – CHALLENGES AND OPPORTUNITIES

Leaving the Customs Union, Single Market, Common Fisheries Policy and EU's environmental frameworks represents a potentially dramatic change for ports. As UK ports handle 95% of our international trade this means they will be literally at the forefront of new trading arrangements.

There will no doubt be new global trade opportunities but it is vital that existing links with EU states are not over burdened by customs and governmental checks at the border. There is a real danger of congestion at ports if new bureaucratic requirements are introduced after Brexit, particularly for HGVs travelling to/from Ireland, via key Roll-on Roll-off ferry ports in Wales.

Despite Brexit the EU is another source of legislation. Much of the environmental and planning frameworks under which ports operate stem from EU rules. Moving towards the UK's departure from the EU there are opportunities to streamline the consenting regime and fast track planning decisions for ports. This will help Welsh ports compete in the post Brexit environment. It is vital that existing and new environmental designations do not stifle port activity and limit port developments.

Many Welsh ports rely on fish landings from EU flagged vessels and this helps sustain the wider Welsh fishing industry and is important to other parts of the economy such as catering businesses and restaurants. Ensuring a continuation of current fishing activities is important, particularly to smaller ports in Wales. The Welsh fishing industry and ports have also benefitted from the EU's fisheries grants system and given the relatively modest sums we will be urging the UK and Welsh Governments to design a similar domestic scheme in the future, post Brexit.

The recently passed EU Port Services Regulation (PSR) represents a very unwelcome restriction on the ability of many of the larger ports in Wales to make market choices about service provision and charging. The assistance of Welsh MEPs during the passage of the PSR was much appreciated by the ports sector in Wales. We are now working with the Department for Transport to look at ways which limit the possible negative impacts that the legislation may introduce for the UK and Welsh ports.

SUPPORTING BUSINESS AND INDUSTRY

Each year Welsh ports handle **11%**, or around **54m tonnes**, of UK freight and this includes significant volumes of ferry traffic, oil and gas, containers, steel, biomass, bulks as well as other offshore renewable cargoes. Welsh ports also provide vital facilities for cruise ships, marine leisure activities and the fishing industry. These are diverse and fundamental trades, supporting almost 11,000 direct, indirect and induced jobs as well as sustaining vital parts of the economy.

The Welsh and UK economies are served by distribution chains spanning the globe – gas from Qatar and Trinidad; iron ore from Australia and the Americas, building products and other vital trades to and from Europe; oil and fuel to and from all parts of the world including the US, South America, West Africa and Asia; and 'motorways of the sea' ferry services to Ireland. Per tonne of cargo moved, shipping has the lowest environmental impact. Sustainability in our economy is therefore strongly linked with investment in port areas and the infrastructure that serves them.

The UK provides a vital 'land bridge' link for freight and goods between continental Europe and Ireland. Welsh ferry ports are vital to the link. These routes are also important passenger gateways and in 2016 Welsh ports handled over two and half million passenger journeys on ferries.

EACH YEAR WELSH PORTS HANDLE 11%, OR AROUND 54M TONNES, OF UK FREIGHT



THE WELSH PORTS INDUSTRY

Ports and harbours are products of their locations. They vary widely in size and type of activity, and can have local, regional and sometimes national significance.

Apart from the commercial operations normally associated with ports – the handling of freight and passengers – they carry out many important statutory duties, ranging from ensuring navigational safety to the operation of sophisticated security and environmental regimes. They provide facilities for a wide range of users and support a variety of businesses.

There are three models of port ownership, trust, municipal and privatised. All exist side by side in Wales and their status does not affect their independence. A trust port is an independent statutory body governed by its own local legislation and controlled by an independent board.

Trust ports have a high degree of accountability and follow government guidelines on how they should demonstrate accountability and commercial progress. Trust ports in Wales vary in size and include Milford Haven, Neath, Newport, Caernarvon and Saundersfoot.

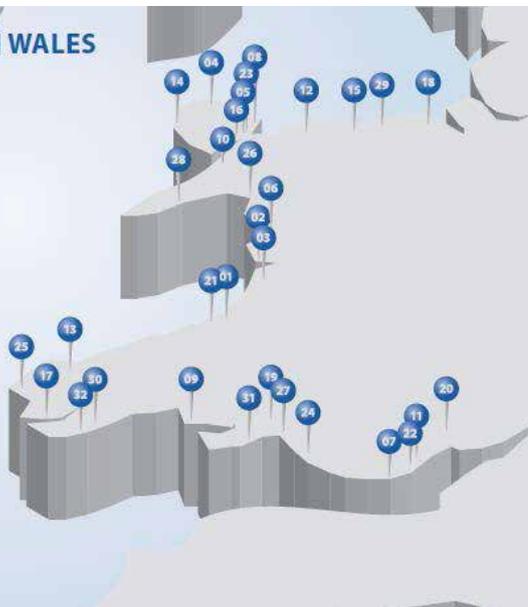
There is a substantial privatised port sector in Wales. Privatised ports are privately owned companies, sometimes part of a larger ports group, for example, the south Wales ports of Associated British Ports (ABP) which include the operations at Barry, Cardiff, Newport, Port Talbot and Swansea. Other privately-owned ports include the Stena Line Ports of Holyhead and Fishguard and the independently owned Port of Mostyn.

Municipal ports are run by local authorities. They have their own governance guidelines which emphasise the benefits of both financial independence through the ring-fencing of accounts as well as the setting up of corporate structures with a more traditional board approach, allowing the executive to work with a board with a range of maritime and business expertise. Examples of Welsh local authorities with ports interests include Conwy and Isle of Anglesey councils. For the most part, local authority ports in Wales are smaller harbours focussed on leisure and fishing.

PORT LOCATIONS IN WALES



- | | |
|-----------------|------------------|
| 01 Aberaeron | 17 Milford Haven |
| 02 Aberdyfi | 18 Mostyn |
| 03 Aberystwyth | 19 Neath |
| 04 Amlwch | 20 Newport |
| 05 Bangor | 21 New Quay |
| 06 Barmouth | 22 Penarth |
| 07 Barry | 23 Penrhyn |
| 08 Beaumaris | 24 Porthcawl |
| 09 Burry Port | 25 Porthcais |
| 10 Caernarfon | 26 Porthmadog |
| 11 Cardiff | 27 Port Talbot |
| 12 Conwy | 28 Pwllheli |
| 13 Fishguard | 29 Rhyl |
| 14 Holyhead | 30 Saundersfoot |
| 15 Llandudlas | 31 Swansea |
| 16 Menai Bridge | 32 Tenby |





WELSH PORTS: FACTS AND FIGURES

- In 2016 Welsh ports imported and exported 54 million tonnes of cargo, more than 11% of the total of UK throughput and equivalent to 18 tonnes of cargo per person in Wales.
- In 2015 Welsh ports accounted for 1.2% of Welsh GVA, amounting to £560 million.
- The ports sector in Wales currently creates around 11,000 direct, indirect and induced jobs.

REGIONAL IMPACT OF THE UK PORTS INDUSTRY IN 2015

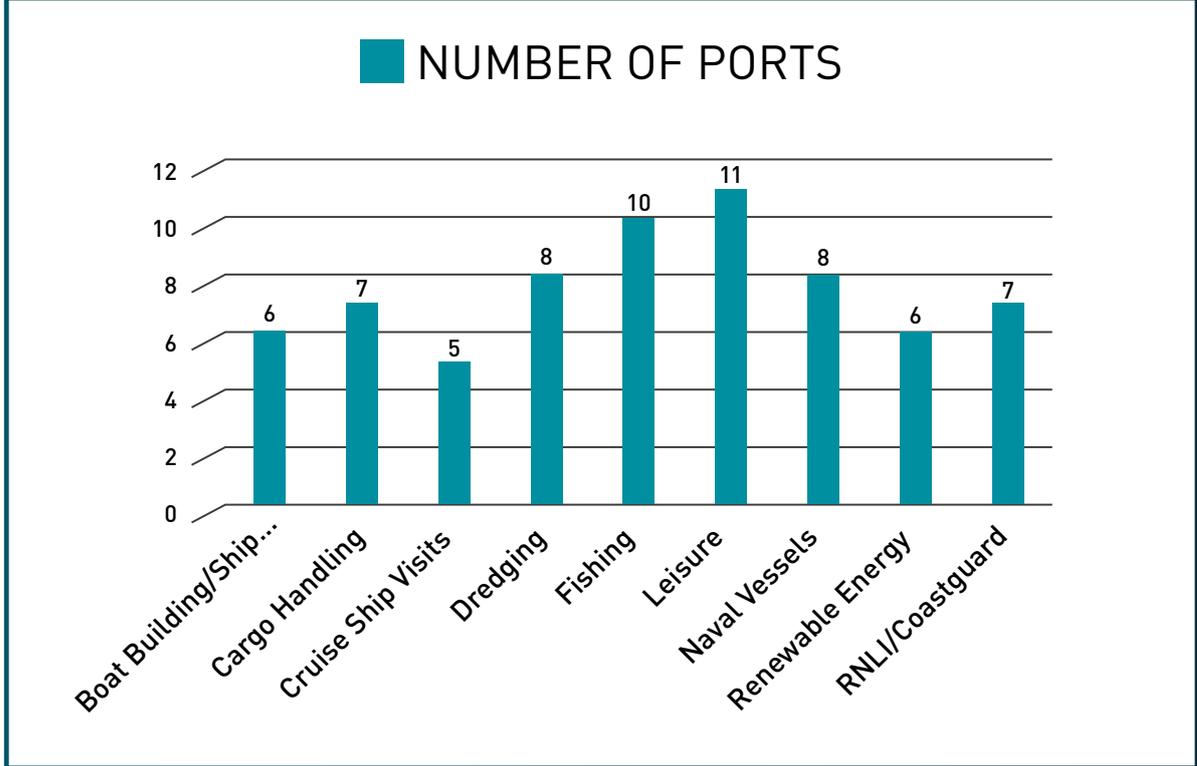
GVA (£MILLION)

	Direct	Indirect	Induced	Total	% of GVA
Wales	140	220	190	560	1.2%

EMPLOYMENT

	Direct	Indirect	Induced	Total	% of Employment
Wales	2,600	4,500	3,800	10,900	0.9%

ACTIVITIES AT WELSH PORTS



CONNECTIONS AND INFRASTRUCTURE INVESTMENT



Transport and infrastructure are critical to a successful economy and Welsh ports are an important gateway for international trade. Nationally and locally, the Welsh Government's ability to invest in the transport network is a key factor.

The overwhelming majority of goods and passengers enter and leave ports by roads which are therefore vital to our success.

In recent years there have been a number of initiatives and government plans to bolster transport, energy and regeneration. These have mostly been very welcome although funding remains relatively modest. Connectivity covers many aspects, including not only improvements to the M4, rail electrification but also investment in high speed broadband. All contribute to ensure that ports and the Welsh economy remain competitive and dynamic.



SUSTAINABLE DEVELOPMENT

PER TONNE OF CARGO MOVED, SHIPPING HAS THE LOWEST ENVIRONMENTAL IMPACT.

Welsh ports have an excellent record on the environment and the industry is committed to building on its good environmental performance. Port developments are subject to a thorough planning and consenting regime. We are keen that these processes are streamlined as much as possible to help ports press ahead with projects. To function and develop ports often need specific marine licences granted by Natural Resources Wales. These can be for dredging to maintain safe access for ships or for new developments. The Welsh Government has recently reviewed the marine licences fees regime and there will be some increases in costs for some ports.

In comparison with other parts of the UK, Welsh ports are disadvantaged in terms of marine licensing requirements and the limited lengths of dredging consents, which in some cases in England can be more than three times as long as in Wales, whilst still maintaining proper safeguards on developer activity. There remain a high number of activities which require licences and we have been pressing the Welsh Government to introduce a number of exemptions for low risk activities, as is the case in England. **Given the sensitivity of port markets the Welsh ports industry has been frustrated at the lack of progress in this area.**

We are also keen that as part of the review the consenting team retains a strong focus on customer service and its own performance levels. Licensing conditions for port development consents need to be proportionate.

Separately the Welsh Government is in the process of producing its own National Marine Plan. The Plan will provide a strategic framework for all coastal activities in Wales and is required to balance socio economic activities and sustainably. The current draft of the Plan recognises important port and shipping activities. Our view is that some of the general policies are too prescriptive and we have previously written to officials outlining our concerns. It is vital that this Plan does not limit development and growth.



SUSTAINING A PROGRESSIVE SECTOR'S FUTURE

As a means of promoting cooperation with the Welsh Government, the Welsh Ports Group has produced a number of suggested *Shared Policy Objectives* that would help sustain the Welsh Ports industry's economic contribution and future. **These include:**

- Regular industry/government dialogue
- Maintenance of the current market-led approach to ports policy
- Support for the current mix of different port ownership models
- Streamlining of the planning and marine consents system
- Promoting a marine protection strategy which balances environmental, economic and social needs
- Promoting a policy framework which allows Welsh ports to remain competitive with those outside Wales
- Achieving greater recognition of the importance of improved road and rail connectivity schemes for Welsh ports to encourage increased freight and passenger movements
- Exchanging information on growth opportunities in port markets.

WE LOOK FORWARD TO AND WELCOME DISCUSSIONS OF THESE POINTS WITH KEY ORGANISATIONS AND OUR COLLEAGUES IN THE WELSH GOVERNMENT.

WELSH PORTS DIRECTORY



ABP Barry

Port Office, Atlantic way
Barry
CF63 3US

Tel: 0870 609 6699

Website: www.abports.co.uk

Contact: John Phillips, Commercial and Logistics Manager -
JPhillips@abports.co.uk



ABP Port Talbot

Puckey House, Port Talbot Harbour
Port Talbot
SA13 1RB

Tel: 0870 609 6699

Website: www.abports.co.uk

Contact: John Phillips, Commercial and Logistics Manager -
JPhillips@abports.co.uk



ABP Cardiff

QA House, Cargo Road
Cardiff
CF10 4LY

Tel: 02920 835 062

Website: www.abports.co.uk

Contact: Ralph Windeatt, Head of Commercial -
rwindeatt@abports.co.uk



ABP Swansea

Harbour Office, Lockhead
Kings Dock
Swansea

SA1 1QR

Tel: 0870 609 6699

Website: www.abports.co.uk

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JPhillips@abports.co.uk



ABP Newport

Port House, Alexandra Dock
Newport
NP20 2UW

Tel: 02920 835 062

Website: www.abports.co.uk

Contact: Ralph Windeatt, Head of Commercial -
rwindeatt@abports.co.uk



Conwy Harbour (Conwy County Council)

Harbour Office, Conwy Quay
Conwy
LL32 8BB

Tel: 01492 596 253

Website: www.conwy.gov.uk

Contact:

- Matthew Forbes, Harbour Master -
harbwr.conwy.harbour@conwy.gov.uk
- Barry Tuson, Deputy Harbour Master -
barry.tuson@conwy.gov.uk

Types of traffic handled: fishing and leisure

**Port of Fishguard - Stena Line Ports Ltd**

Goodwick
Pembrokeshire
SA64 0BU
Tel: 01348 404425

Website: www.fishguardport.com

Contact: Ian Davies, Route Manager -
ian.davies@stenaline.com

Types of traffic handled: ro-ro

**Holyhead Port – Stena Line Ports Ltd**

Stena House, Station Approach
Holyhead
Anglesey
LL65 1DQ

Tel: 01407 606 660

Websites: www.holyheadport.co.uk / www.stenaline.com

Contact: Captain Wyn Parry, Ship and Port Manager -
wyn.parry@stenaline.com

Types of traffic handled: ro-ro, general cargo, bulk, and cruise

**Isle of Anglesey County Council Maritime Services**

Council Offices, Llangefni
Anglesey, LL77 7TW
Principal Harbours: Amlwch Harbour
Beaumaris Pier and Menai Bridge Pier
Tel: 01248 752 320

Website: www.anglesey.gov.uk/leisure/maritime-services

Contact: John Owen, Senior Maritime Officer -
joxht@anglesey.gov.uk

Types of traffic handled: leisure, fish

**Port of Milford Haven**

Gorsewood Drive
Milford Haven
Pembrokeshire
SA73 3EP

Tel: 01646 696100

Website: www.mhpa.co.uk

Contact:

- Alec Don, Chief Executive - alec.don@mhpa.co.uk
- Andy Jones, Deputy Chief Executive - andy.jones@mhpa.co.uk

Types of traffic handled: bulk liquids, ro-ro, fish, dry bulks,
project cargoes, general cargo, and cruise

**The Port of Mostyn Limited**

Coast Road, Holywell, Flintshire, CH8 9HE
Tel: 01745 560 335

Website: www.portofmostyn.co.uk

Contact:

- Jim O'Toole, Managing Director - jim.otoole@portofmostyn.com
- Captain Roy Hyde-Linaker, Harbour Master - harbourmaster@portofmostyn.com
- William Calderbank, Port Manager - will.calderbank@portofmostyn.com

Types of traffic handled: general cargo, bulks, ro-ro, project cargoes – offshore windfarm service bases.

**Neath Port Authority**

Woodfield House, Castle Walk, Neath
West Glamorgan, SA11 3LN

Tel: 01639 633 486

Website: www.npt.gov.uk

Contacts:

- GT Pullen, Chairman
- R Minty, Manager
- RW Hemming, Harbour Master

Email: portofneath@btconnect.com

Types of traffic handled: export of steel coils, scrap materials,
recyclable waste, import of animal feed, salt, re-bar and sand.

**Newport Harbour Commissioners**

24 Bridge Street
Newport, Wales
NP20 4SF

Tel: 01633 265 323

Website: www.newportharbourcommissioners.org.uk

Contact:

- Colin Crick, Chairman
- Jill Lloyd, Clerk to the Commission

Email: clerk@newportharbourcommissioners.org.uk

Types of traffic handled: conservancy services for the
Port of Newport.

**Saundersfoot Harbour Commissioners**

The Harbour
Saundersfoot
Pembrokeshire
SA69 9HE

Tel: 01834 812 094

Website: www.saundersfootharbour.co.uk

Contact:

- Mr M Davies, Chief Executive Officer - mdavies@saundersfootharbour.co.uk
- Mr P Evans – Chairman
- Mr E Sangster – Vice Chairman

Email: info@saundersfootharbour.co.uk

Types of traffic handled:

leisure, fishing and commercial pleasure boats.



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