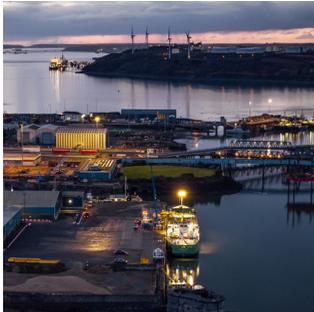




WELSH PORTS GROUP



Strategic assets for
Wales' economy and
energy future





Introduction

Welsh ports are a cornerstone of national and regional economic activity. As well as being important trade gateways they are also logistics centres, energy supply-chain platforms and tourism destinations, supporting thousands of jobs across the country.

Each year Welsh ports handle substantial volumes of freight and provide vital links between Wales, Ireland, continental Europe, and global markets. As gateways to future growth industries, ports will play a central role in enabling economic development, supporting trade, attracting investment, and creating high-quality jobs across the Welsh economy.

The ports ecosystem underpins a wide range of Welsh supply chains that intersects with the wider economy, including manufacturing, retail logistics, construction, energy supply, tourism, and fishing. As statutory harbour authorities, Welsh ports manage and protect important waterways including the Milford Haven Waterway, the Severn Estuary and Swansea Bay, playing an important role in safeguarding marine environments and supporting coastal ecosystems. The sector supports 12,000 jobs, while the broader logistics economy in Wales employs more than 90,000 people - around 6.7% of the Welsh workforce.

Growth sectors and value creation

Offshore wind and associated clean energy supply chains are major growth engines for Welsh ports. From carbon capture and energy storage to small modular nuclear reactors (SMRs), sustainable aviation fuel and hydrogen production, Welsh ports are the foundation of the energy transition and the jobs, investment and prosperity that will come with it.

The 2025 Welsh Ports Prospectus, ***This is Welsh Ports***, positions Wales at the heart of the UK's clean energy revolution. It highlights the role of Wales' deep-water harbours, established engineering capabilities, and the Anglesey and the Celtic Freeports as central to supporting offshore wind development.

The Prospectus concludes that:

- Over 20 GW of offshore wind capacity is forecast around Wales by 2045
- The sector could deliver around 29,000 jobs and £4.5 billion of economic impact by 2030
- Welsh ports are central to supply chains for both fixed-bottom and floating offshore wind (FLOW) - from turbine assembly and integration to operation and maintenance.

Recent progress on The Crown Estate's seabed leasing round - enabling up to 4.5 GW of potential FLOW capacity in the Celtic Sea - marks an important step in unlocking investment opportunities. However, additional seabed leasing will be required to create a stronger pipeline of opportunity and support long-term private investment in port-based manufacturing, assembly, and logistics.

Welsh ports are also investing in decarbonising their operations through onsite renewable energy generation, including solar arrays, alongside infrastructure for alternative fuels and energy storage.

Other growth areas include advanced manufacturing, steel supply chains, and the diversification of freight and passenger flows. Having a modern transport network helps ports remain efficient, attract investment, and compete with hubs outside Wales.

In terms of transport connectivity, roads are key to Welsh ports - carrying over 90% of freight to and from ports and connecting coastal communities to visitor and business markets. However, road investment both in terms of the trunk road network and those managed by local authorities has been disproportionately lower than in other parts of the UK. Whilst the ports sector has and continues to invest in its own infrastructure and activities, we do need local and national policymakers to match our ambitions and increase investment.

There are also opportunities for rail to carry more freight. Efficient multimodal connections including increased rail freight (via gauge enhancements, protected freight paths) and pipelines are critical to realising modal shift.

As such, planning and decision-making on development, regeneration, and energy-related port investment must be communicated clearly and timely to ports and relevant bodies, with public agencies and regulators equipped to support timely, proportionate, and commercially realistic decisions.



Three asks for 2026 Senedd candidates

1. Maximise Offshore Wind and Industrial Supply Chain Opportunities by

leveraging The Crown Estate's seabed leasing in the Celtic and Irish Seas, recognising ports as a critical part of the offshore energy transition and supporting port infrastructure to host manufacturing, clean energy logistics and long-term private investment.

2. Enable timely Planning and Marine Consenting by

reviewing and resourcing planning and marine licensing processes so port development and upgrades, grid connections, dredging, and energy or fuel-related infrastructure can be delivered efficiently, while maintaining

high environmental standards. The industry also has a longstanding ask for a presumption in favour approach to decisions, more resources for consenting and policy teams, and a strategy which promotes and not inhibits port investment and growth.

3. Deliver the Welsh Freight and Logistics Strategy in a UK-wide context by

developing a comprehensive freight policy aligning maritime, rail, road and inland logistics to boost competitiveness, decarbonisation, and resilience that reflect movements across the UK to maintain a level playing field, with priority given in rail and road port connectivity.



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