

# **Newhaven Marine & Maritime Cluster Study**

## **Final Report**



**Private and Confidential**

Nairne Consultancy Services Ltd

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## Executive Summary

The marine and maritime sector is an important part of Newhaven's economy, heritage and identity. Its port is a gateway to Europe, through which 350,000 passengers and around 780,000 tonnes of freight pass each year. Unlike many port towns, Newhaven also has a significant fishing industry, (with over 900 tonnes of catch landed in 2022) and a 285 berth marina. Newhaven has key assets. These include:

- Its railhead;
- Its accessibility to London, Paris and western Europe;
- Its developable land; and
- Its deep water berths, which means that it can accommodate sizeable craft.

The scale of the local sector is not easy to define, partly because there are several associated businesses that are linked to the Marine sector, including aggregates, tourism and border force staff, for example. The lack of a vision for the local sector and its fragmentation exacerbate this.

At national level, the sector is significant and growing. If supply chain businesses are included, it contributes over £49 billion to the UK economy and it supports over one million jobs. It accounts for 95% of the UK's traded goods, 48% of its energy supply and 25% of its food supply. Whilst Brexit has created challenges for small, short sea ports, the overall trends for the industry appear positive, even if there is a shift towards longer distance, Asian markets.

The UK Government has developed a framework for the Maritime sector – Maritime 2050. This focuses on five themes and ten strategic ambitions (see Annex III). As an energy intensive sector, transition to Net Zero is a major challenge for the Maritime sector, along with developing skills for the future workforce and digitalisation. The Government has adopted a regional cluster approach, which includes London and the Solent.

Newhaven Port has shown a strong recovery since the Covid-19 pandemic: Passenger numbers have returned to 2019 levels and there has been a significant increase in the tonnage of cargo that has been transported through the Port. There are also new opportunities for Newhaven, resulting for the £37 million of public investment, which aims to transform the town, so that it becomes attractive to visitors, residents and business investors.

These investments provide the potential for Newhaven to develop a stronger visitor and leisure economy, built around the seaside and marine & maritime sector, including the port, the marina, the West Quay developments.

There has previously been interest in developing a Marine, Skills & Enterprise Hub that is linked to the London Maritime cluster and there is interest from stakeholders in developing a coordinated approach to supporting sector growth.

Whilst the town is modest in size, it needs to look to the future to develop its potential and to work collaboratively both internally and within a wider spatial area with other ports, where this makes best sense.

There is a challenge as to whether Ports should diversify or specialise, but key to either is to ensure that there are stronger links between maritime businesses and their local communities.

Newhaven is fortunate to have an established Port Users Group, which brings many stakeholders together, albeit, largely to discuss operational matters. Better coordination and developing a shared vision requires a strategic approach, however. Whilst there is little appetite for “talking shops” that don’t lead to tangible benefits and actions, there is merit in reviewing the Terms of Reference of the Port Users Group so that it adopts a strategic, as well as an operational role. This would need to be supported by additional resource to improve coordination, provide secretariat support and to develop and take forward high level actions to support sector growth.

There is some nervousness about “big ticket” interventions that can fail to take stakeholders on a journey at the right pace, so the key to the development of the cluster is to build on the good relations that already exist between partners and to be open to collaborating beyond Newhaven, where it is appropriate to do so. The high level action plan, below provides a framework for interventions that, with the right resource investment and governance structures, could be taken forward to support the sector’s future growth.

Theme 1: Green Technology & Renewable Energy
1.1 Establish links with the National Catapults in Blyth and Grimsby to establish how Newhaven can benefit from its existing renewable energy expertise
1.2 Work closely with Rampion to establish how best local businesses can prepare to benefit from Rampion 2.
1.3 Enter knowledge exchange dialogue with Shoreham Port to identify where best to collaborate on initiatives to support the transition to Net Zero.
1.4 Develop Newhaven into an attractive investment location for green businesses, linked Rampion supply chain.
1.5 Work with partners to lobby government to support the Maritime sector to adapt to Net Zero
1.6 Support NPP to realise the potential of Site E1 as a site to accommodate uses which will generate high-quality employment opportunities
Theme 2: Coastal Visitor Economy
2.1 Develop the waterfront at Newhaven along the river to include public realm, wayfinding and improved amenities and services.
2.2 Work alongside private developer to help enable the project at Newhaven Marina to go forward if viable.
2.3 Review and develop an Events Plan in conjunction with Creative Newhaven to develop and deliver events that have the potential to attract visitors.
2.4 Develop and promote the cultural & heritage offer building on investment at Newhaven Fort to establish a broad cultural offer, appealing to residents and visitors and contributing to the night time economy locally.
2.5 Attract new hotel and self-catering accommodation investment to Newhaven and encourage existing accommodation providers to invest in and broaden their product offer.
2.7 Provide appropriate <b>content</b> to key visitor websites ( <a href="http://www.visitlewes.com">www.visitlewes.com</a> ) to ensure it is inspiring, concise and targeted with appealing, energetic content and imagery.
2.8 Undertake a social media campaign to gain coverage in national and regional titles to raise awareness of the destination, the new developments and activities.

Theme 3: Skills & Labour Supply
3.1 Undertake a skills audit of the expected demand for maritime skills across a wider geographic area (e.g.: Greater Brighton or Sussex)
3.2 Develop a school/college/university engagement programme to raise awareness of opportunities in the Marine sector.
3.2 Work with providers to better understand the scale that is required to provide specialist and bespoke training courses.
3.4 Develop maritime specialist apprenticeship programmes in partnership with local businesses.
3.5 Work with universities to develop specialist skills programmes to support the maritime sector
3.6 Develop Newhaven into a recognised centre of excellence for Maritime skills

## 1. Background and Context

The aim of the study is to provide a framework for the potential development of a Newhaven Marine & Maritime Cluster to unlock growth and regeneration opportunities in the town. The intention is to develop a strategy and action plan to create a Marine and Maritime Cluster to accelerate technological development, leading to indigenous growth, new start-up businesses and to attract inward investment. Specifically, the commission will:

- Analyse the size, nature and performance of the marine and maritime cluster in Newhaven, including the production of a Cluster Fact Sheet;
- Review marine and maritime market trends, including examples of good practice;
- Identify the challenges and opportunities facing the marine and maritime cluster; and
- Assess the linkages between the cluster strengths and opportunities in Newhaven and regional / national programmes.

The outcome of the project will be a draft strategy and action plan to grow the cluster (if it is identified), including a route map for formalising arrangements to drive implementation of the plan.

Recent years have seen £37 million public investment in Newhaven and a more coordinated approach to the town's regeneration through the *Re-Imagining Newhaven* programme. The successful Levelling Up Fund bid - '*Catching the Value of the Catch*' – is aimed at strengthening the town's fishing industry by providing new landing stages, developing a processing centre, and building a community destination and restaurant at West Quay. The Town Investment Plan includes interventions to improve the town's marine gateway and to strengthen Newhaven as a visitor destination. The Future High Streets Fund focuses on improving the town centre, including bringing disused buildings back into economic use. Alongside this, the Newhaven Enterprise Zone has been established to unlock, consolidate infrastructure and provide incentives to attract private investment into the town.

The town's Marine & Maritime sector is an integral part of its heritage and economy. It has many facets, which can mean that its contribution and potential is less visible than it could be. A clearer understanding of this and a coordinated approach could enable the sector to build on the benefits of the public investments that are expected to come to fruition over the next few years.

## 2. National Trends

### Summary

- The maritime sector is of major importance to the UK economy and international trade, accounting for the transportation of 95% of its traded goods, 48% of its energy supply and 25% of its food supply;
- Projections suggest that the sector is expected to continue to grow and that the UK is well-positioned to retain a thriving and competitive maritime and marine sector
- Better application of data and digital technologies will improve port efficiencies and the sector will need to respond to the changing demands of manufacturers
- Climate change mitigation and adapting to meet net zero targets are key issues facing the sector
- Changing international post-Brexit trading patterns, the shift in the economic balance to the East and the rising populations in Africa all have an impact on the marine sector
- The sector needs to people with skills to reflect the changes in demand and to diversify its workforce
- The Government is encouraging cluster development, particularly at a regional level where there is critical mass to share knowledge and develop innovative approaches to improving the efficiency of the sector.

The Maritime Sector is the main facilitator of UK trade - 95% of its internationally traded goods are transported via ships; seaborne trade provides 25% of the UK's energy supply and 48% of its food supply.

In April 2022, CEBR produced an assessment of the economic contribution of the Maritime sector to the UK economy, based on the definitions shown in Annex II. Its analysis suggests that the sector directly employs 227,100 people, has a turnover of £55.5 billion and a GVA contribution of £18.7 billion. Between 2010 and 2019, employment in the sector increased by +35,100 (+18.3%), whilst its GVA contribution has increased by £5.5 billion (+39.6%), suggesting an increase in productivity from £69,792 per job to £82,343 per job. Productivity was highest in the Shipping and Marine Business Services sub-sectors and lowest in the Leisure Marine sub-sector.

CEBR analysis finds that the UK Maritime sector has greater direct turnover than the rail transport sector, the air transport sector and the road and other land transport sectors, with shipping being the main economic contributor.

There are, of course, many other industries that are dependent on the Maritime sector and the report suggests that, once these are considered, its GVA contribution rises to £48.9 billion – 2.6 times its direct contribution. In terms of employment, it supports 1.06 million direct indirect and induced jobs, with the majority of these being associated with the Shipping (646,000) and Marine Engineering & Scientific (217,000) sub-sectors.

The South East region's turnover contribution (£12.7 billion) is second only to London (£15.7 billion) and it accounts for a fifth (20%) of the sector's GVA and a similar proportion of its employment (21%)



The report's trend analysis suggests a positive outlook for the sector, nationally. In nominal terms, it is forecast to grow by 16.6% between 2021 and 2025, as the volume of goods transported by sea is expected to continue to grow. It suggests that UK ports need adapt to the changing import and export demands of manufacturers, resulting from Brexit and the shift in economic power towards Asia, to maintain competitive advantage.

*'Maritime 2050 – Navigating the Future'* sets out the Government's long-term framework for the development of the UK Maritime sector. It is shaped by five core values that guide the national activities and goals for the sector.

- A premium brand, not compromising on safety
- A balanced set of priorities
- A commitment to the rules-based approach
- A truly global United Kingdom
- Real partnership between government and industry

These are underpinned by ten strategic ambitions (see Annex III) and seven high level themes. The maritime sector is a key enabler of international trade. It is likely to remain the main vehicle for transporting goods and commodities around the world, but the international pattern of import and export markets is expected to change.

Key priorities and challenges for the sector include:

- Targeting a 50% reduction in greenhouse gases from the sector by 2050 by improving infrastructure, promoting the take up of carbon neutral fuels (e.g. hydrogen), generating renewable energy and ensuring that ports are protected from flooding and tidal surges;
- Embracing and using data and digitalisation effectively to improve ports' processes and performance; and
- Improving skills and diversifying the marine workforce, including ensuring that the sector has people with the right STEM-related skills to respond to emerging technological changes.

The ability of ports to efficiently unload, handle, and transfer containers has assumed prime importance in making the shipping supply chain as efficient as possible. Upgrading port connectivity infrastructure to smoothly transfer containers from ship, to rail, to road, has revolutionised the size and scale of the shipping industry.

Maritime 2050 highlights the importance of cluster development, thought leadership and strong partnership working between academia, government departments and agencies and businesses in the maritime sector. Fewer ports are expected to handle the majority of goods entering and leaving the UK, as specialisation in commodities increases. Some ports will need to diversify into new activities and to develop new partnerships to test and apply new technologies. Real time data will increase operational efficiencies and new transport modes will need to be incorporated into maritime investment programmes.

The maritime sector has a key role in the UK renewable energy supply. It also directly supports marine aggregates, communications, offshore oil and gas and the marine and 'blue' leisure industries. The UK has a strong shipbuilding and engineering industry and is a major exporter of maritime equipment and systems.

A new Maritime Innovation Hub has been established at the Port of Tyne. It will foster collaboration among partners to advance the maritime sector and the broader logistics industry. This includes encouraging the exchange of ideas, harnessing cutting-edge research and development, promoting technological advancements, and tackling shared challenges identified in Maritime 2050. Alongside this, the Government intends to implement a programme of Port Economic Partnerships, the first of which was launched in Southampton in 2019. The aim of these partnerships is to leverage maximum benefits from public and private sector investment and to improve the efficiency of the planning processes.

Maritime 2050 emphasises the strengths of the UK's maritime clusters. It identifies seven clusters:

- Scottish Maritime, which is a ship management cluster
- Aberdeen, which provides logistical support to the North Sea gas and oil industry
- Humber, which specialises in the marine and offshore energy sectors
- Mersey which is developing a global centre of excellence for marine and maritime innovation, knowledge and skills
- London, which is a world-leading maritime professional services hub and is the location of the IMO headquarters
- Cornwall, which focuses on leisure marine
- Solent, which has leading maritime universities and has Lloyd's register.

These are all major centres, in which a critical mass of expertise and skills and close partnership working can be harnessed to drive innovation, improved efficiency and growth within the sector and to exchange knowledge to rise to the sector's future challenges and opportunities.

A report<sup>1</sup> for the British Ports Authority suggests that there are benefits of better coordination and links between Ports and their city (town) authorities, particularly in terms of ensuring that there are local social and economic benefits from port-related activity. In addition to strengthening local supply chains and sourcing labour locally, there could be opportunities to raise awareness of maritime activities through events and education activities, for example.

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<sup>1</sup> Port Cities of the Future; Ramboll, University of Southampton & British Ports Authority;

### 3. Newhaven – The Local Context

#### Summary

- The Port is a key part of Newhaven's economy, history and identity and an important gateway between the UK and Europe
- Newhaven has key strengths, including its rail link, speed of access to south west Europe and the efficiency and reliability of the ferry service land availability, and suitable seabed aggregate
- Direct maritime and marine employment is currently fairly modest, but port activities support a much wider range of industries locally and across the English Channel, in France
- Newhaven is unusual in being a port that serves fishing, cargo and passengers, although it modest in size in each of these compared with the more significant UK ports
- An AECOM for Lewes District Council recommends that land adjacent to the Port should be retained for maritime related employment use to allow the port to develop
- There is evidence of clustering in aggregates and scrap metal recycling
- Newhaven has 285 berths marina and hosts the onshore centre for the Rampion windfarm.
- There is significant interest in developing Newhaven's maritime capability, as evidenced by previous proposals to develop a Marine Skills & Enterprise Hub at the UTC building
- Newhaven is part of a wider coastal sub-region, which includes Brighton Marina and Shoreham Harbour.

Newhaven is a small, but important port town. It has a resident population of around 13,000 and 600 businesses across all sectors. As a strategic maritime gateway to France, Newhaven port has always been a key part of the town's economy, history and identity, facilitating trade and commerce between the UK and Europe. It has been, and remains, a key source of direct and indirect employment for the town's residents and the passenger ferries support tourism locally, regionally and nationally. It also has a strong role in attracting investment by businesses that are looking for efficient access to international markets or which provide maritime support services. In addition to the ferry, there are berths for short sea and coastal cargo shipping, a marina for leisure craft, and a fishing fleet and dedicated quays for commercial fishing vessels.

Based on the Scottish Government's definition (see Annex I), which includes tourism-related activities, there are 47 marine-related businesses in Newhaven<sup>2</sup>, representing around 5% of local businesses. These businesses employ 182 people between them, with Newhaven Port & Properties Ltd being the largest employer, with 32 employees.

UK Business Counts suggests that there 51 local business units in Newhaven, employing 210 people. This includes 10 marine fishing businesses and 100 people employed in Service Activities Incidental to Water Transportation Both sources suggest that bars/restaurants/cafes account for the majority of businesses and employees. Marine Management Organisation (MMO) data shows that there were 29 fishing vessels registered in Newhaven, down from a peak of 37 in 2020.

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<sup>2</sup> <https://www.gov.scot/publications/scotlands-marine-economic-statistics/pages/31/>

A 2015 cluster study<sup>3</sup> identified 59 marine & maritime businesses in Newhaven, nearly half (22) of which were commercial fishing businesses. Other subsectors included Boatyard Facilities (5), Moorings (5), Marine Engineering (4) and Marine Surveyors (3). The report, by Susie Miller, describes the cluster as well-established, with 80% of the businesses in the sector operating for over ten years, whilst their turnover was estimated to be “well in excess of £10 million per year”.

The study estimated that the sector directly employs 121 staff, including 95 full-time workers, most of whom are local residents. In addition to this, local supply chains supporting the industry provides additional value to the Newhaven economy.

Newhaven Port & Properties Ltd directly employs 33 full-time staff, with a further 50 local people working as agents for the ferry operator, DFDS. Rampion Windfarm employs 65 staff, 42 of whom work full-time. Marine Management Organisation (MMO) data shows that there were 37 fishing vessels registered in Newhaven in 2020, although this has since dropped to 29.

Despite its modest size, Newhaven is an important marine and maritime centre with deep water berths that are able to cater for large superyachts and ferries. Transmarche Ferries operates a daily ferry service between Newhaven and Dieppe, with two sailings per day in the winter, rising to four in the summer months.

In 2022, there were 372,000 passenger movements<sup>4</sup>. This is almost back to pre-Covid-19 levels. The number of passenger movements is more than in Poole (141,000), Fishguard (265,000), Milford Haven (215,000) and Plymouth (338,000) (see Annex II). Newhaven has performed strongly in terms of passenger movements since the Covid-19 pandemic. Nationally, international passenger numbers are still -31% below pre-covid levels.

Newhaven Port is also a significant freight port, carrying 1,140,000 tonnes of goods in 2022<sup>5</sup>. This is an increase of +361 tonnes of freight that was carried through the port in 2019, prior to the Covid-19 pandemic year. It is also more than is transported through Poole (583,000), Boston (650,000), Sunderland (720,000) and Fishguard (242,000) and similar to River Trent (906,000). Several ports have not managed to recover the volume of freight that they transport, but this is not the case for Newhaven, which has performed strongly. Across the freight transport volumes are still around 5% below pre-Covid levels, but in Newhaven they are 46% higher.

Newhaven is also a significant fishing port, landing 916 tonnes of catch in 2019 – similar volumes to Kings Lynn (882), Wells (873), Oban (984) and Portsmouth (988). The Covid-19 pandemic had no impact on freight transportation through Newhaven, although since Brexit, small, short sea ports have seen a 20% fall in cargo trade. However, 208,000 (+26%) more tonnes of freight was transported through Newhaven in 2021 than in 2019 – the most significant proportionate increase of all UK ports over the period. This seems to be due to a new flow of sea dredged aggregates using the port<sup>6</sup>. Nevertheless, cargo trade is heavily linked to the construction trade, which makes it volatile and cyclical.

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<sup>3</sup> The Newhaven Marine Cluster Review (2015) by Susie Miller;

<sup>4</sup> UK International Short Sea Passenger Movements by Ferry Route from 2003; DfT Sea Passenger Statistics

<sup>5</sup> All UK major and minor port freight tonnage traffic, by port and year (filter by direction), from 1965 Department of Transport Port Freight Statistics 2023

<sup>6</sup> Newhaven Port Freight Assessment; AECOM for Lewes District Council, November 2022

In November 2022, AECOM produced a Newhaven Port Freight Assessment on behalf of Lewes District Council<sup>7</sup>. This noted the clustering of aggregates and scrap metal recycling businesses linked to the Port and its role in supporting key industries on both sides of the English Channel, including the manufacturing, technical and creative industries in East Sussex and the manufacturing and tourism sectors in northern France. Reduced travel time and service reliability are identified as key advantages of using Newhaven Port, whilst the new Port Access Road aims to address some of the concerns that hauliers have in relation to parking.

The report notes that, in terms of cargo, Newhaven cannot offer the same scale and capability as Shoreham or Dover but that it is similar to Rye in this respect. The rail link is one of Newhaven's key strengths, alongside suitable seabed aggregate and relatively good land availability.

Few ports seem to have all these three marine dimensions: Shoreham lands ten times the volume of fish and double the amount of freight, but it is not a passenger ferry terminal; and Poole carries similar amounts of freight, fewer passengers than Newhaven, but it is not a fishing port. Newhaven also has a Marina with berths for 285 crafts, a 12 tonne hoist and ashore boat storage, drying piles and grid, slipway launching, and free parking. With the public investment in the town, Newhaven has the potential to strengthen its marine & maritime leisure offer for residents and visitors, retaining spend that would otherwise leak out of the town.

Newhaven is the on-shore base for the Rampion Off Shore windfarm. This provides highly skilled jobs, which are expected to increase Rampion 2 is developed over the next few years. The town is also home to commercial trades in aggregates and scrap metal.

There is on-going interest in developing Newhaven's marine and maritime sector. This has included plans to develop the University Technology Centre into a Marine Skills and Enterprise Hub, with the aim of securing Newhaven's future as "a thriving commercial and ferry port and tourism gateway, providing infrastructure for job-creating businesses in the new low carbon, leisure marine and fishing industries". The Marine Skills and Enterprise Hub proposals aimed to build on the town's maritime strengths and to provide space for a range of education, training, research and business support services to develop the sector locally, focusing on Marine Engineering, Environmental Technology & Services, Ports & Logistics and Commercial fishing.

The *Newhaven Town Deal Investment Plan (This is Newhaven)* highlights the importance of the town as a 'Southern Gateway' and the need to build on its 'Maritime Heritage'. Proposals to convert the Old Shipyard into a residential site have met with concerns from Sub Search Marine Services that this will inhibit opportunities for Newhaven to develop into a thriving marine centre in the future.

In terms of port expansion, the AECOM report identified two main areas of land that are suitable for port development. These are a 1.5-hectare plot of land immediately south of the current site of the port offices and a 4-hectare plot, which is mostly to the east of the new Port Access Road. It recommends that these sites continue to be allocated for employment uses associated with the port, although current constraints mean that growth in cargo transportation is likely to be modest over the medium term.

Whilst Newhaven has marine and maritime diversity, currently, its economic contribution appears to still be limited, mainly because it is a small town. Newhaven sits within the Greater Brighton City Region, whose coastal strip includes Lewes District, Brighton & Hove, Adur (including Shoreham) and Worthing.

This wider area has 555,000 residents (including 359,000 16-64 year olds), 29,000 businesses and 249,000 employees. Based on the Scottish Government's definition of the Marine and Maritime sector, there are 365 employed specifically in the Marine sector. Once tourism-related activity is included, the number of employees rises to over 24,000. The Fame database identifies 85 marine specific businesses, employing 390 people. This includes 110 direct employees at Shoreham Port.

Shoreham Port is a key a major commercial port, located within the Greater Brighton City Region. It has state of the art facilities to handle 1.5 million tonnes of cargo, including bulk materials, aggregates, timber, and other commodities. It is one of England's largest fishing ports, landing £15 million worth of fish, and it handles around 14,000 marine recreational and leisure craft movements each year. Shoreham Port is committed to implementing environmentally sustainable practices and investing in energy-efficient technologies to improve its environmental performance.

Brighton Marina was built in the 1970s. With 1,300 berths and a full-service boatyard and associated marine, it is the largest marina in the UK. It is a major retail, leisure and recreation centre and significant residential developments.

There are other marine based initiatives within the Greater Brighton coastal strip. These include Sussex Bay, led by Adur & Worthing Councils, which aims to build the funding and governance infrastructure that is needed to restore and maintain the kelp forest and other "blue" habitats along the West Sussex coast.

## 4. Strengths, Weaknesses, Opportunities and Threats

The table below sets out the strengths, weaknesses, challenges and opportunities for the marine and maritime sector in Newhaven.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Recognised nationally as an important and growing sector</li> <li>▪ The Port is a key part of the town's economy, history and identity</li> <li>▪ Deep-water Port with railhead</li> <li>▪ Established (and growing) ferry link</li> <li>▪ Growing marine businesses, e.g. Rampion Windfarm</li> <li>▪ Established forums such as the Port Users Group</li> <li>▪ Investment in Port activities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Difficult sector / cluster to define</li> <li>▪ Small scale (size, scale and economic impact) when compared to other port towns</li> <li>▪ Lack of strategic vision and direction and limited resources to extend activities</li> <li>▪ Lack of labour market intelligence</li> <li>▪ Modest supply chain linkages</li> <li>▪ Lack of profile as a coastal destination</li> <li>▪ Limited private sector investment</li> <li>▪ Decline of fisheries</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▪ Long-term framework – Maritime 2050: Navigating the Future – shapes the direction of travel for the sector</li> <li>▪ Stakeholder commitment to grow the sector</li> <li>▪ DFDS investment in ferry service</li> <li>▪ Part of the London &amp; South East regional Maritime cluster</li> <li>▪ Emerging Port of Newhaven masterplan and relatively good land availability: catalyst for regional growth?</li> <li>▪ Further investment in green technology</li> <li>▪ Proposed Rampion 2 development, which could lead to a doubling of employment at Newhaven</li> <li>▪ Planned investment at the marina</li> <li>▪ Port investment and planned Town Centre improvements through Town Deal; Levelling Up Fund and Future High Streets Fund investment plans</li> <li>▪ Investment in coastal tourism product and links to the wider Sussex Local Visitor Economy Partnership</li> <li>▪ Collaboration with other coastal ports, particularly Shoreham Port</li> </ul>	<ul style="list-style-type: none"> <li>▪ Risk of contraction of the sector and loss of marine employment land (Old Shipyard)</li> <li>▪ Limited local skilled workforce to support the sector</li> <li>▪ Competitor investment</li> <li>▪ Lack of collaboration and partnership working</li> <li>▪ Costs involved in achieving full decarbonisation</li> <li>▪ National priorities focused on larger ports</li> </ul>

## 5. Examples of Good Practice for Elsewhere

### A: Port of Grimsby, the UK Operations & Maintenance Centre of Excellence

Over the past 15 years, offshore wind has emerged as an increasingly significant contributor to Grimsby's economy. The town's proximity to the North Sea, allied to its port infrastructure and the marine skills of its inhabitants, meant it was perfectly placed to seize early opportunities in the offshore wind sector. The port is now the leading hub for the operations and maintenance of wind farms in the central North Sea.

Located in the Port of Grimsby, the UK Operations & Maintenance Centre of Excellence (OMCE) is building on the Humber region's energy heritage and extensive experience of servicing offshore wind farms. The OMCE is a national hub for enhancing the UK's world leading position in offshore wind operational performance. It is a catalyst for innovation, technology, cross-sector collaboration and best practice to enhance safety, reduce cost and support the growth of UK O&M.

The Centre of Excellence is working to drive decarbonisation across the O&M lifecycle, creating a 'wind to wake' whole system innovation cluster based around a demonstration Net Zero Port, where alternative fuels completely displace petrochemicals, and drive thinking to refurbishment and reuse of parts. Elements of the project include:

- Integration of alternative decarbonised fuels into OSW operations - creating a 'springboard industry' to accelerate broader maritime decarbonisation
- Rolling out access to alternative decarbonised fuels for the logistics and supply chain
- Developing and demonstrating net-zero technologies, systems and processes into O&M
- Developing and demonstrating the circular economy in wind to maximise recovery and regeneration of materials

Current projects include an industry coalition working together to accelerate the decarbonisation of the O&M vessels in the North Sea offshore wind sector.

The Rampion Offshore Windfarm operations and maintenance facility based on East Quay already employs 60 full time employees, including engineers, wind turbine technicians, vessel logistics team and crew. The team use three 12-seat crew transfer vessels to undertake maintenance activities. The facility is already utilising cutting-edge technology in its O&M activities and the planned expansion of the windfarm is likely to double employment and extend its contribution to the local economy. Connecting with the Catapult in Grimsby may provide opportunities for the facility to build on good practice, for example in terms of decarbonisation and local supply chain development.



## **B. Port of Blyth, Northumberland: Port Diversification and Clean Energy**

Blyth is a small town in Northumberland, around 13 miles north-east of Newcastle. It has a resident population of 39,000, with a history of shipbuilding and fishing. It has struggled to recover from the decline of local shipyards, but it has received considerable town centre investment and quayside regeneration. It is now one of the Government's 55 Long-Term Plan for towns areas.

The Port of Blyth is a Trust Port, which has a history dating back to the 12 century and it expanded to become a major route for the export of coal, alongside a growing shipbuilding capacity. With the decline in shipbuilding and coal, the Port set up a ports' packing business, Transped, and diversified into logistics. It now handles 1.5 million tonnes of cargo annually, with international links to the Netherlands, Germany and Belgium. Blyth continues to be a fishing port and, in 2022, it landed 855 tonnes of catch, similar to the volume landed in Newhaven.

Alongside this, Blyth has become a significant base for the Offshore Renewable Energy Catapult, the national centre for offshore wind turbine testing. It has attracted companies, such as EDF Energy, Lynemouth Power and Estover Energy and it is reported to have supported over 400 SMEs in technology development, demonstration and product commercialisation support. The aim is to use this facility to attract new inward investment and to re-enforce supply chains in key local economic sectors. A STEM Centre has been established.

There is significant land available around the Port of Blyth and, it is one of the Investment Zone for the North East sites, with tax incentives to promote clean energy and advanced manufacturing.

Whilst the scale at Blyth may be greater, Newhaven has developable land around the Port, which could be a focus for marine and/or clean energy related activity. Blyth, too, has had to re-invent itself from a drastic decline in traditional industries. Investment in the town centre has helped to do this. Its Investment Zone status has provide investors with tax incentives, whilst the diversification into activities related to Port activities and significance of the Offshore Energy Catapult are helping to regenerate the town.

Newhaven may not have the advantage being the location of a Catapult Centre, lessons could be learned about how best to strengthen links with higher education for how to develop a more focused approach to skills to support the marine and maritime sector in the town.

## **C. Fishguard & Goodwick, Pembrokeshire: Coastal Tourism**

Fishguard & Goodwick have a combined population of around 5,000 and are located on the north Pembrokeshire coast.

Although small in size, it has a significant ferry and railway terminal, is a cruise ship port, and is the end point of the A40, which runs to and from London. The ferry service runs twice daily to Rosslare in Ireland and in 2019 it carried 239,000 passengers – somewhat less than Newhaven, but still significant, given the size of the town.

Although surrounded by the Pembrokeshire Coastal National Park, it is largely excluded from its jurisdiction. Nevertheless, it has significant natural and heritage assets, in terms of its coastline, its proximity to the National Park, its ancient monuments, its listed buildings and its conservation areas.

Given this, there is a strong focus on tourism. It brands itself as the “Gateway to Pembrokeshire Coast National Park”. North Pembrokeshire Trade & Tourism Ltd, a local business association, has developed the [Visit Fishguard](#) website, which includes lists of places to stay; cafes; pubs, restaurants and takeaways; local services; and featured local businesses.

It is promoting the town to visitors through social media and it has developed a local tours business, which enables visitors to explore the area by minibuses. It has established links with Bergamo University in Italy, which attracts interns to support local businesses and it is engaged in several activities to promote port towns as visitor destinations. A Fishguard Bay Welcome Team welcomes cruise ship passengers to the town.

Newhaven’s location, in close proximity to, but outside the jurisdiction of the South Downs National Park, means that there are some similarities with Fishguard & Goodwick.

The Towns Fund, Levelling Up Fund and Future High Streets Fund provide the town with the opportunity to reposition itself as a visitor destination. Whilst it is not a cruise ship port, its passenger numbers are greater than in Fishguard, and with its growing Marina there are opportunities to take a more coordinated approach to promoting the town and its surrounding areas to visitors, perhaps learning lessons from some of the activities being undertaken in Fishguard, including by North Pembrokeshire Trade & Tourism

## 6. Themes for Development

In addition to the desk research, fifteen stakeholders from the private and public sectors were invited to contribute to the study. In total, nine people took part in one-to-one discussions, including representatives from Lewes District Council, West Sussex County Council, Newhaven Port & Properties Ltd, Shoreham Port, Rampion Windfarm, Newhaven Fish & Flake Society, National Maritime and Fairways Marine.

The Port Cities of the Future report<sup>8</sup> identifies a strategic challenges as to whether Ports should diversify or specialise. Scale and expansion limitation or potential is likely to have a bearing on this. For smaller Ports, such as Newhaven, there may be greater options associated with closer collaboration with other Sussex Ports.

Currently 70% of Newhaven Port's income comes from the ferry service, with the remaining revenue coming from commercial rents, including from Rampion and Bretts, for example. Shoreham Port has already embarked on a path of diversification and is positioning itself to address the need to transition to Net Zero. A third of its revenue is now rental income from its 177 on-site businesses, and it is continuing to build commercial property at the Port. A further third comes from traditional fishing and cargo services; and the final third comes from specialist marine services, including chandlery. It has also purchased its own fleet of HGV vehicles to cut carbon emissions and it has set Green KPIs that have helped to secure investment. In early 2024, it was successful in securing a share of £6m through the Local Industrial Decarbonisation Plan competition.

Newhaven does not have the scale of major ports, but it has the potential to diversify and there are several building blocks in place for the sector to make a greater contribution to the local and sub-regional economy. These include:

- Levelling Up Fund, Towns Fund and Future High Streets Fund investment in the town, the benefits of which should start to become apparent over the next 12-18 months;
- The developing tourism offer, including proposed investment at the West Beach, potential for enhanced destination marketing through the newly established Sussex Local Visitor Economy Partnership / Experience Sussex DMO, staying visitors learning at Seahaven Training and 350,000 annual passengers that pass through the town;
- The emerging Port Masterplan, including the use of land at site E1 and its proposed focus on green technology;
- The proposed Rampion 2 development, which is likely to lead to a double of the maintenance workforce in Newhaven;
- Newhaven Marina expansion and investment plans, including attracting high net worth individuals and high- end facilities and residential development (including the potential of a new hotel);
- The multi-million pound refurbishment of the DFDS Transmarche Ferries, which is likely to improve the passenger experience; and
- A national policy environment that supports the marine and maritime sector, which could trigger formal collaboration across Sussex Ports, particularly with Shoreham Port, to ensure that there is a stronger voice for smaller port towns to Government and regional agencies;

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<sup>8</sup> Port Cities of the Future; Ramboll, University of Southampton & British Ports Authority;

There is significant marine-related activity in Newhaven, relative to the size of the town. There is an established Port User Group, which meets biannually and the relationships between different interest groups appear to be good. However, there is a lack of a coordinated and strategic approach to development of the sector, with most engagement being largely operational.

Stakeholders are, understandably, nervous about establishing new groups and spending time in discussions that do not have a clear and direct, focus. For this reason, actions are likely to be best delivered through additional resource and/or through existing consultative forums, such as the Port User Group. Despite this, there is likely to be a need for a more strategic approach, which may not always seem directly actionable. There are risks that the voice of smaller port towns could be lost if a national government strategy is strongly focused on major maritime cities. The route round this is likely to be better coordination with neighbouring ports in terms of knowledge exchange and lobbying on common issues.

In addition, opportunities for the sector need to be future-focused, which means taking a co-ordinated approach to planning for the future and to work out, collectively how best to capitalise on opportunities and to address challenges.

The investment in Newhaven town has the potential to improve its profile as a visitor destination; Rampion is shortly to start on its planning stage for its Rampion 2 development; there seem to be perennial challenges in addressing skills needs within the sector, which may require better scale to be deliverable; whilst the emerging Port Masterplan provides further opportunities for a more coordinated approach to ensure that it helps to deliver high quality local jobs.

There can be a tension between grand plans, which can fail to take people with them, and proposed small-scale, incremental developments that can appear to be unambitious. But there is scope for vision development, based on existing circumstances and realistic, but ambitious, future opportunities. The best practice examples set out in the previous section provide practical examples of how better coordination can lead to clear actions to support maritime towns, based on their unique assets.

## 7. A Framework for Action

The Newhaven Enterprise Zone (NEZ) has allocated £100,000 in 2024/25 to support the marine sector to secure a prosperous future and sustainable growth. Key to developing the sector is better coordination and good governance arrangements:

### **Governance**

The precise details of how governance arrangements would work will be established with further consultation between the Newhaven Enterprise Zone and its partners. However, key recommendations include:

#### ***Broadening the Terms of Reference of the Port Users Group***

There is no merit in or appetite for establishing another forum to address the needs of the sector. The Port Users Group is well-established, but largely operates on an operational basis. If there is to be a more strategic approach to the development of the sector, it will need to change its Terms of Reference to reflect this. This does not mean replacing its existing activities. It means ensuring that it becomes the voice for the town's Marine sector, identifying and agreeing priorities for the future, monitoring and overseeing the delivery of actions; promoting Newhaven as a location for marine-related activity; and ensuring that policy interventions reflect the sector's needs, in its broadest sense.

#### ***Marine Sector Project Co-ordinator***

It is not realistic to expect existing stakeholders to provide the coordinating role to develop a strategic approach to sector development. It is likely to be time and resource intensive;

A Marine Sector Project Coordinator role could:

- Build consensus around future priorities
- Establish where and how best Newhaven can work most effectively with neighbouring ports, including Shoreham and, subsequently, other Sussex Ports;
- Provide secretariat support to the Port Users Group, in relation to its new strategic functions;
- Take forward the high-level actions plan, and support stakeholders to implement actions within it;
- Ensuring that local residents and businesses benefit from the town's Marine-related activities;
- Develop external links with the sector and promote Newhaven as a centre for Maritime and Marine investment;
- Horizon scan for funding opportunities and policy proposals that will support the development of the sector.

Whether the resource should be in the form of a person from within the sector or a "fresh pair of eyes" with a broader understanding of economic development issues, is likely to be a matter for further discussion. Whilst a sector specialist is likely to bring specific knowledge and established networks, a skilled person from outside the sector may be able to broker agreements more effectively and to integrate the needs of the sector within a wider economic context.

The high level Action Plan sets out a list of indicative actions, under three broad themes:

- Green technology & renewable energy
- Coastal Visitor economy
- Skills & labour supply.

Consideration will need to be given into potential cost implications for both capital and revenue funding for each of the actions<sup>9</sup>.

Theme 1: Green Technology & Renewable Energy		
<p><b>Rationale:</b> The Marine sector is carbon intensive and there are major challenges for businesses to adapt to the Government's Net Zero challenges. Alongside this, Newhaven is already the location of Rampion's onshore maintenance facility, so it has a strong foothold in the renewable energy sector. There are challenges in linking the specialist businesses to the local economy, as supply chains are international. Nevertheless, Rampion 2 is at planning stage and construction is expected to commence in 2027.</p> <p>Newhaven has land for development, particularly the 1.5 hectare site, immediately to the south of the Port and a 4 hectare site, mostly to the east of the Port Access Road, both of which are allocated to uses linked to the Port.</p> <p>Shoreham Port is already investing in diversification and implementing actions to transition to Net Zero. With the emerging Port Masterplan and the expected Rampion 2 development, Newhaven, perhaps in collaboration with neighbouring Ports, has an opportunity to strengthen its attractiveness as a green investment location.</p>		
Action	Who needs to be involved	Timescale
Establish links with the National Catapults in Blyth and Grimsby to establish how Newhaven can benefit from its existing renewable energy expertise	LDC/NEZ/Rampion	Short-Medium
Work closely with Rampion to establish how best local businesses can prepare to benefit from Rampion 2.	LDC/NEZ/Rampion	Short-Medium
Enter knowledge exchange dialogue with Shoreham Port to identify where best to collaborate on initiatives to support the transition to Net Zero.	NEZ; NPP Ltd, Shoreham Port Authority; GBEB; LDC	Short-Medium
Develop Newhaven into an attractive investment location for green businesses, linked Rampion supply chain.	LDC/NEZ/Rampion/Local East Sussex	Short-Medium

<sup>9</sup> Short term = up to 18 months; Medium term = 18 months to 36 months; Long term, = 36 months+

Support NPP to realise the potential of Site E1 as a site to accommodate uses which will generate high-quality employment opportunities	NEZ/LDC/NPP	Short-Medium
Work with partners to lobby government to support the Maritime sector to adapt to Net Zero	NEZ, LDC , Sussex Ports, UK Maritime	On-going

## Theme 2: Coastal Visitor Economy

**Rationale:** Newhaven is an important gateway to and from mainland Europe with 350,000 passengers passing through the town each year. Until now, it has not been able to take advantage of this from a visitor perspective – there have been few attractions and the town has not been noted as an attractive visitor destination.

The development of Newhaven Marina and the public investment through the Future High Streets Fund, Levelling Up Fund and the Towns Fund, aim to change this, improving public realm, developing the town centre and investing in attractions like Newhaven Fort.

Fishguard & Goodwick provide a good example of the actions that can be taken to position port towns as visitor destinations and the results of recent investments mean that Newhaven should become a more attractive visitor destination for business, education and leisure visitors.

Action	Who needs to be involved	Timescale
Develop the waterfront at Newhaven along the river to include public realm, wayfinding and improved amenities and services.	LDC / NEZ	Medium
Work alongside private developer to help enable project at Newhaven Marina to go forward if viable.	NEZ / LDC	Long
Review and develop an Events Plan in conjunction with Creative Newhaven to develop and deliver events that have the potential to attract visitors.	Creative Newhaven / NEZ (creative-lead)	Ongoing
Develop and promote the cultural & heritage offer building on investment at Newhaven Fort to establish a broad cultural offer, appealing to residents and visitors and contributing to the night time economy locally.	NEZ / Newhaven Fort	Ongoing
Attract new hotel and self-catering accommodation investment to Newhaven and encourage existing accommodation providers to invest in and broaden their product offer.	LDC / NEZ	Ongoing
Provide appropriate <b>content</b> to key visitor websites ( <a href="http://www.visitlewes.com">www.visitlewes.com</a> ) to ensure it is inspiring, concise	NEZ / PR support	Ongoing

and targeted with appealing, energetic content and imagery.		
Undertake a social media campaign to gain coverage in national and regional titles to raise awareness of the destination, the new developments and activities.	NEZ / PR support	On-going

### Theme 3: Skills & Labour Supply

**Rationale:** The Port Cities of the Future report identified a need to reconnect ports to their local communities by improving engagement and social impact. Seahaven Maritime Academy runs a wide range of maritime training courses and has a reputation that attracts students to Newhaven from around the world.

Nevertheless, the sector continues to have skills challenges and finds it difficult to attract new recruits. Rampion has identified a potential need to improve the local skills supply and, across the UK, there is a need to develop new skills in the marine sector that reflect its changing demands, including in Maritime security, autonomous systems, marine renewables, propulsion technology; and electronic data management.

Previous plans to develop a marine skills and enterprise hub at the UTC building included proposals to develop an internationally recognised training centre for environmental engineering and maritime (hospitality & catering, marine social sciences, seafood aquatic & fisheries).

There is likely to be an initial issue of scale, unless or until Newhaven becomes an established regional centre for Maritime training.

Action	Who needs to be involved	Timescale
Undertake a skills audit of the expected demand for maritime skills across a wider geographic area (e.g.: Greater Brighton or Sussex)	UK Maritime Enterprise; NEZ; LDC, Port User Group; East Sussex Colleges	Short
Develop a school/college/university engagement programme to raise awareness of opportunities in the Marine sector.	NEZ; East Sussex County Council; Port User Group; local universities	On-going
Work with providers to better understand the scale that is required to provide specialist and bespoke training courses.	NEZ; East Sussex Colleges	Short
Develop maritime specialist apprenticeship programmes in partnership with local businesses.	NEZ; East Sussex Colleges; Maritime businesses	Medium
Work with universities to develop specialist skills programmes to support the maritime sector	NEZ; UoS	Medium
Develop Newhaven into a recognised centre of excellence for Maritime skills	NEZ; training providers; Port Users Group	Medium-Long



## 8. Summary and Conclusions

The Maritime and Marine sector is a key part of Newhaven's identity, heritage and economy, but it lacks a clear and coordinated vision for the future and it is not straightforward to estimate its size and economic contribution, given the range of industries that are linked to it.

At national level, the sector continues to grow, with sea transport expected to continue to be the main method by which goods are transported around the world.

The sector faces major challenges, including relating to Net Zero compliance and recovery from Brexit and the Covid-19 pandemic. Whilst some Ports are specialising, others, including Shoreham are diversifying.

Newhaven has some key advantages, despite being a relatively small town. It has a rail head linked to the Port; it is a deep water port; it is well located in terms of connectivity and its links to London, in particular; it has developable land; it operates in freight, passengers and fishing; and it has a marina.

Recent public investment in Newhaven is expected to have a transformational effect on the town, enabling it to make the transition from a lower level manufacturing town to one that is attractive to visitors and that will encourage new business investment to catalyse growth in the future.

Whilst its scale is modest compared with the UK's larger maritime centres, it can build on its assets if there is a coordinated approach to identifying and delivering a vision for the sector. In Rampion, it has a leading international specialist renewable energy business that is looking to expand; whilst Newhaven is located as a gateway to the South Downs National Park, but not bound by the restrictions of its jurisdiction.

There is no appetite for more structures and "talking shops", but there is a willingness to collaborate if there are seen to be tangible projects and benefits in doing so. The existing Port Users Group could be a good mechanism through which to develop a more strategic approach, as long as this is supported by investment in resources to take actions forward and to facilitate coordination.

The national government's approach appears to be based on larger port cities and it is important that the voice of smaller port towns is not left behind. In relation to this, as well as to knowledge exchange, there is merit in developing stronger links with neighbouring ports, including Shoreham, to develop scale.

There are good examples of what other port towns are doing to ensure that they adapt to benefit their towns. These include towns like Blyth and Grimsby, which are building expertise around renewable energy; and Fishguard & Goodwick, which are focusing strongly on the visitor economy.

Key to all future developments is stakeholder engagement and support. There is some nervousness about 'big ticket' investments that may not take partners with them. Instead, a step by step approach, built on strong trust, good governance and sustained support for an agreed vision may be the most appropriate way forward.

## Annex I: Sector Definitions

CEBR uses definitions based on five categories: Shipping Industry; Ports Industry; Leisure Marine Industry; Marine Engineering & Scientific Industry; and Marine Business Services Industry. The subsectors associated with these are shown below, but they do not fit neatly into Standard Industrial Classification (SIC) codes, so they are difficult to map directly onto Newhaven.

### Shipping industry

- International transport of passengers;
- Transport of passengers on inland waterways;
- International transport of freight
- Transport of freight on inland waterways.

### Ports industry

- Warehousing and storage
- Port activities and management;
- Stevedores, cargo and passenger handling;
- Border agency, HMRC and public sector employees operating in ports.

### Marine industry

- Boatbuilding (marine leisure vessels);
- Marine renewable energy;
- Marine support activities for off shore oil and gas, engineering and mining;
- Recreational marine activities, marine finance and legal activities and general marine services;
- Marine science and academic activities, including government vessels and technical consulting.

### Maritime Business Services industry

- Shipbroking;
- Maritime insurance, finance and legal services;
- Ship surveying and classification;
- Maritime education (including university courses and cadet training) ○
- Maritime consultancy and accountancy.

The Scottish Office uses SIC code definitions and divides the Marine sector into Specific Marine and Marine Tourism & Recreation (see Annex IV). This includes broader tourism sub-sectors, such as botanical and zoological gardens and nature reserve activities, hotels, bars & restaurants and museums.

### Specific Marine SIC Codes

- 03.1 Fishing
- 03.2 Aquaculture
- 09.1 Support activities for petroleum and natural gas
- 10.2 Processing and preserving of fish, crustaceans and molluscs
- 30.1 Building of ships and boats
- 33.15 Repair and maintenance of ships and boats
- 42.91 Construction of water projects
- 52.22 Service activities incidental to water transportation
- 50.1 Sea and coastal passenger water transport

- 50.2 Sea and coastal freight water transport
- 77.34 Renting and leasing of water transport equipment

**Marine Tourism & Recreation SIC Codes**

- 55.1 Hotels & similar accommodation
- 55.2 Holiday and other short stay accommodation
- 55.3 Camping grounds, recreational vehicle parks and trailer parks
- 56.1 Restaurants and mobile food service activities
- 56.3 Beverage serving activities
- 79.12 Tour operator activities
- 79.9 Other reservation service and related activities
- 91.02 Museum activities
- 91.03 Operation of historical sites and buildings and similar visitor attractions
- 91.04 Botanical and zoological gardens and nature reserve activities
- 93.11 Operation of sports facilities
- 93.199 Other sports activities (not including activities of racehorse owners)
- 93.21 Activities of amusement parks and theme parks
- 93.29 Other amusement and recreation activities

## Annex II Port Comparators

Fishing -UK Landings (2022) <sup>10</sup>	Tonnes	Value
<b>UK</b>	<b>395,843</b>	<b>£785,545,599</b>
Saundersfoot	1,144	£1,495,223
Stranraer	1,103	£956,080
Troon and Saltcoats	1,084	£2,791,416
Stornoway	1,027	£4,403,361
Eyemouth	1,002	£3,243,235
Portsmouth	988	£2,063,026
Oban	984	£4,035,051
<b>Newhaven</b>	<b>916</b>	<b>£2,233,709</b>
Kings Lynn	882	£1,558,118
Wells	873	£1,709,908
Blyth	855	£3,140,724
Stromness	831	£2,694,802
Mevagissey	819	£1,829,995
Salcombe	804	£3,122,030
Londonderry	791	£1,336,447
Campbeltown	784	£2,393,317
Shoreham	9,400	£18,100,000
Eastbourne	2,300	£1,300,000

Port	Passenger Movements (2022) <sup>11</sup>	Freight- Tonnes(2022) <sup>12</sup>
<b>Newhaven</b>	<b>372,000</b>	<b>1,140,000</b>
Poole	141,000	583,000
Plymouth	338,000	1,983,000
Milford Haven	215,000	38,902,000
Fishguard	265,000	242,000
Harwich	666,000	4,382,000
Tyne	481,000	3,132,000
Boston	0	650,000
Sunderland	0	720,000
Comarty Firth	0	483,000
Dundee	0	535,000
Swansea	0	327,000
River Trent	0	906,000
<b>UK Total</b>	<b>12,204</b>	<b>458,931,000</b>

<sup>10</sup> UK & Foreign Vessel Landings by UK Port; Marine Management Organisation; 2023

<sup>11</sup> UK International Short Sea Passenger Movements by Ferry Route from 2003, Department for Transport, Sea Passenger Statistics

<sup>12</sup> Freight Traffic by Port & Year; Department for Transport, Port Freight Statistics (2023)

## Annex III: Maritime 2050 Strategic Ambitions and Strategic Values

### Strategic Ambitions

- Maximise our strength in maritime professional services, retaining and enhancing our **UK competitive advantage** in the provision of maritime law, finance, insurance, management and brokering, and developing our green finance offer.
- Lead the way in acting on **clean maritime growth** enjoying economic benefits from being an early adopter or fast mover.
- Strengthen our reputation for maritime innovation, maximising benefits to the UK from new **maritime technology** through our world leading universities, maritime small and medium enterprises (SMEs) and global companies.
- Continue to be recognised as the global leader in **maritime safety and security** standards and expertise worldwide.
- Grow our **maritime workforce and transform their diversity** enhancing our reputation as the world leader in the provision of maritime education and training.
- Promote a **liberalised trading regime** that delivers maximum benefit for our maritime sector.
- Support the continued multi-billion pound commercial investment in **maritime infrastructure** that makes the UK a globally attractive destination for all maritime business.
- Strengthen and enhance our reputation as a **leading country in the International Maritime Organization (IMO), International Labour Organization (ILO) and all international fora** working with like-minded countries to take action.
- Promote our **UK wide leading maritime cluster offer** with government, the maritime sector and academia working in partnership to make the UK the place to do maritime business.
- **Showcase our UK maritime offer to the world**, promoting all parts of the maritime sector including shipping, services, ports, engineering and leisure marine, and through London International Shipping Week (LISW) maintaining its status as the leading global maritime event.

### Maritime 2050 Strategic Values

- **A premium brand, not compromising on safety:** the UK's global reputation for quality will underpin its offer. The UK is renowned and respected in the maritime world for its unwavering approach to quality services and standards supported by UK expertise; we will not diminish those expectations in the pursuit of market share, and aim to go beyond where appropriate. We will always choose to protect the well-being of crew and other personnel and the safety of life at sea and in ports. We will maintain the highest standards of training.
- **A balanced set of priorities:** we recognise the challenges of and potential conflicts between the demands for prosperity, sustainability and security when growing the economy. We will always work towards a balance between the three, and reject policy and delivery approaches which deliver one at the expense of the others.
- **A commitment to the rules-based approach:** to maintain its place as a global trading nation while maximising its competitive advantage, the UK will play a leading and influential role in the maintenance of a rules-based global system, defending and promoting international organisations and approaches, and supporting the global fight against all kinds of threat

- **A truly global United Kingdom:** we will champion an open international trading environment, to build sustainable global prosperity. We will pursue advantageous partnerships right across the world, ensuring the UK's competitiveness, and seek to remove barriers wherever possible. The value we place in our global outlook will be clear in the IMO, ILO and other global fora where we will actively seek to lead and collaborate with like- minded partners.
- **Real partnership between government and industry:** The government and industry partnership is of fundamental importance to ensuring that the UK can be proactive in its response to change, opportunity and challenge. Only by working in full co-operation will the UK reach its full potential.

## Annex IV: List of Consultees

Name	Organisation
Katy Thomas	ESCC
Lisa Rawlinson	LDC
Cpt Dave Collins-Williams	Newhaven Port Authority
David Guy	Newhaven Fish and Flake Society
Daniel Allen Baines	Rampion Offshore Wind
Tom Willis	Shoreham Port
Susi Miller	Fairways Marine
Peter Green	National Maritime

## Annex V: Marine & Maritime<sup>13</sup> Cluster Factsheet

### National

- 95% of the UK's internationally traded goods are transported via ships; seaborne trade provides 25% of the UK's energy supply and 48% of its food supply. It directly employs 227,100 people, has a turnover of £55.5 billion and directly contributes £18.7 billion to the UK economy. Once indirect contributions are included, this rises to a GVA contribution of £48.9 billion, supporting 1.06 million jobs.
- The sector is expected to continue to grow and that the UK is well-positioned to retain a thriving and competitive maritime and marine sector.
- Key challenges include: improving application of data and digital technologies; climate change mitigation; changing international post-Brexit trading patterns; and developing a strong supply of skilled labour
- The Government is encouraging cluster development, particularly at a regional level where there is critical mass to share knowledge and develop innovative approaches to improving

### Local

- Estimates vary, but the Newhaven sector has around 50 local businesses in or related to the sector and employs around 200 people.
- Unusually, Newhaven has passenger services, cargo and fishing. It also has a high end marina with berths for 285 crafts and a 12 tonne hoist and it is home to the shore base of the Rampion Offshore windfarm, which itself employs over 60 staff.
- The Port is a key gateway between the UK and Europe. In 2022, it carried 372,000 passengers; 1,140 tonnes of cargo and it landed 916 tonnes of fish with a landed value of over £2.2 million.
- Newhaven Port has performed well since the 2019 Covid-19, recovering its passenger numbers and substantially increasing volume of cargo it transports.
- Its railhead, the deep water Port and land availability are key assets for developing the Newhaven marine cluster, whilst the £37 million of public investment in the town aims to re-imagine Newhaven as an attractive visitor destination

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<sup>13</sup> Marine and Maritime covers shipping; port activities, including border agency and passenger/cargo handling; fishing and fish processing; marine leisure; boatbuilding; marine renewable energy; marine education & specialist support services. There are several other sectors that are linked to the sector, including marine tourism & recreation; and construction & aggregates.