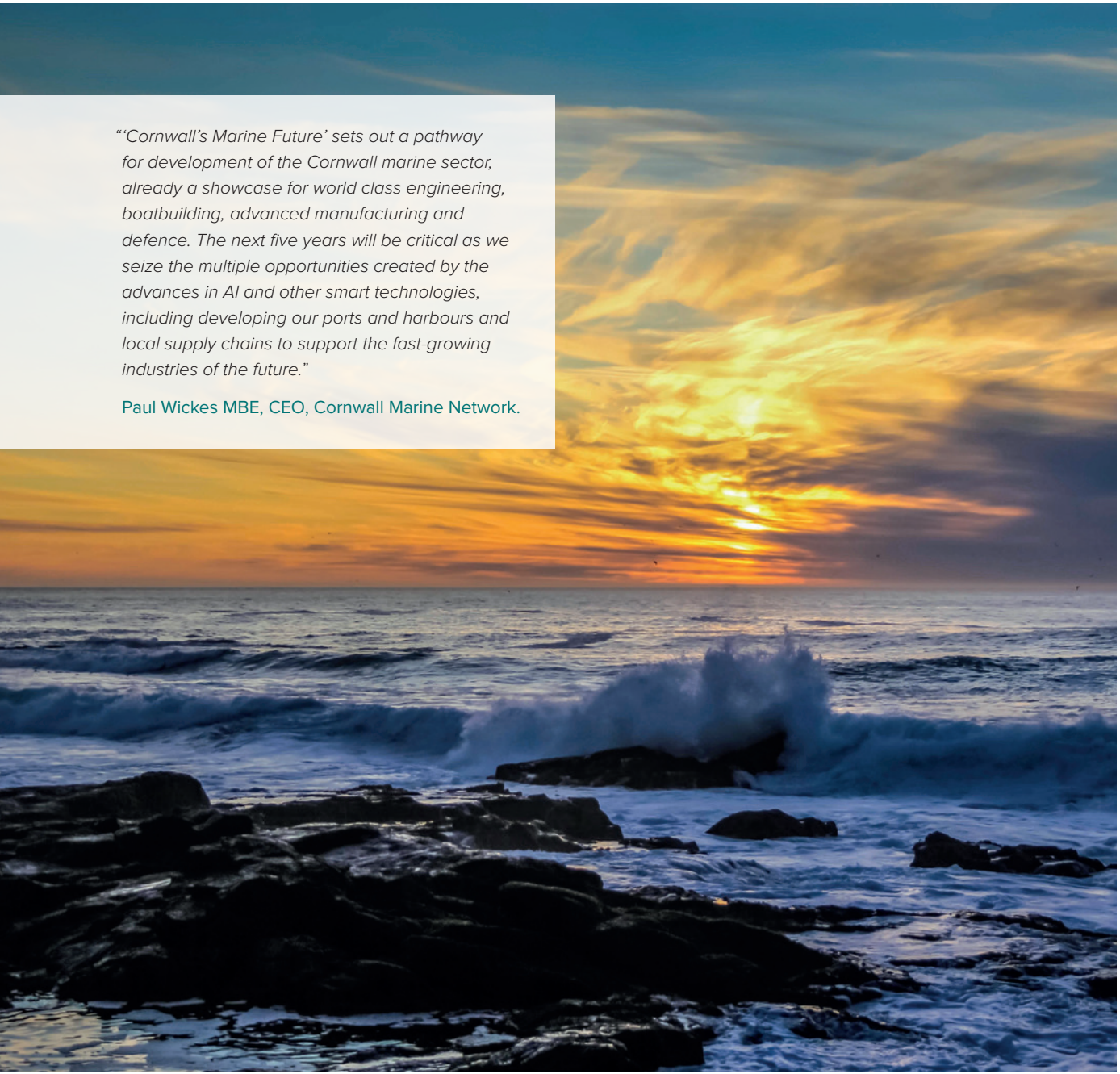
CORNWALL'S
MARINE FUTURE

Cornwall Marine Sector Growth Plan
2026-2031

CORNWALL marine NETWORK

University of Exeter



"'Cornwall's Marine Future' sets out a pathway for development of the Cornwall marine sector, already a showcase for world class engineering, boatbuilding, advanced manufacturing and defence. The next five years will be critical as we seize the multiple opportunities created by the advances in AI and other smart technologies, including developing our ports and harbours and local supply chains to support the fast-growing industries of the future."

Paul Wickes MBE, CEO, Cornwall Marine Network.

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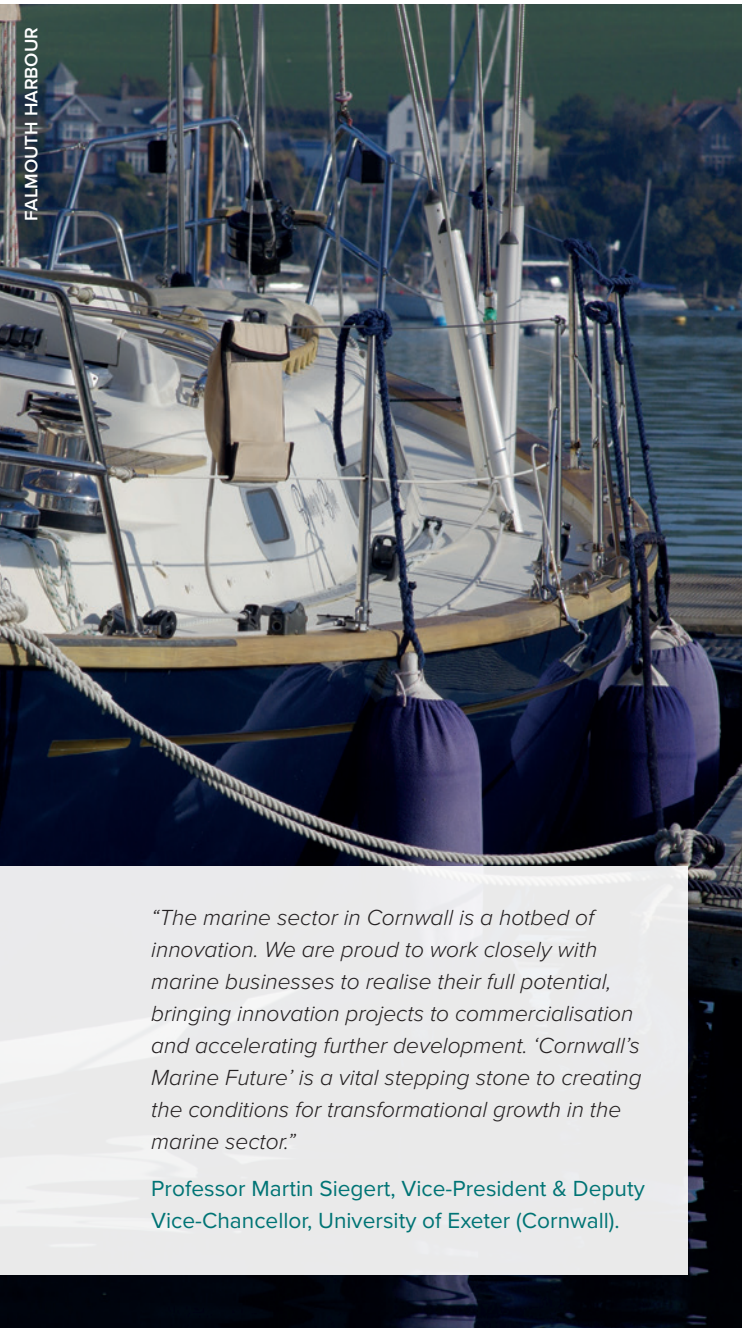

FALMOUTH HARBOUR

"The marine sector in Cornwall is a hotbed of innovation. We are proud to work closely with marine businesses to realise their full potential, bringing innovation projects to commercialisation and accelerating further development. 'Cornwall's Marine Future' is a vital stepping stone to creating the conditions for transformational growth in the marine sector."

Professor Martin Siegert, Vice-President & Deputy Vice-Chancellor, University of Exeter (Cornwall).

FOREWORD

Cornwall's Marine Future is an ambitious blueprint for sustainable, inclusive economic growth of the marine sector in Cornwall. It aligns with all key national, regional and local economic plans and leverages Cornish strengths in marine innovation, placing Cornwall at the forefront of global efforts to build a cleaner, more resilient industrial future.

It brings the diverse work happening across several marine industrial sub-sectors together in an integrated, innovative Marine Sector Growth Plan for 2026-2031. Cornwall Marine Network and University of Exeter have collaborated alongside Industry and key stakeholders to define the Priority Actions 2026-2031 that will be critical to success and will lay the foundations for future development over the next decade and beyond.

Recognised by Maritime UK as a 'Coastal Powerhouse', Cornwall Marine Network (CMN) is Cornwall's marine sector business support cluster organisation. It represents 92% of Cornwall marine sector turnover within its membership of 375 businesses. CMN was commissioned by the Cornwall and Isles of Scilly Economic Forum to work closely with businesses to develop this Growth Plan. University of Exeter has added its academic expertise and significant research and development experience in the sector as well as its in-depth understanding of marine innovation.

We believe by pulling together the work of the various marine sub-sectors in Cornwall, and by creating an integrated framework, we can leverage the full potential of our marine sector.

OUR VISION:

Our vision is of a thriving marine sector, delivering economic and societal benefits for everyone in Cornwall and the Isles of Scilly. The sector includes world-leading pioneering businesses operating at the forefront of industries including marine technology, advanced manufacturing and offshore renewables. Capital investment into ports and harbours, along with supply chain innovation support and development, will enable the sector to take advantage of new opportunities, such as in the defence industry, as well as play a key role in addressing societal challenges such as decarbonisation. The offshore renewables sector, including the emerging Floating Offshore Wind industry, will be actively supported with lay-up space, marine engineering, and operations and maintenance activities, creating a new industry with significant global export potential. Current and future workforce skills will be a key contributor to the high growth, quality and sustainability of the sector well into the future.

INTRODUCTION

The global marine industry will transform over the coming decades, driven by technology adoption, the climate agenda and intensifying geopolitical shifts. Our shared task is to identify and capitalise on the key growth opportunities for Cornwall and the Isles of Scilly, accelerating these by removing barriers, providing support and focusing activity.

'Cornwall's Marine Future' sets out our vision for the Cornwall marine industry and defines the key marine sectors that will contribute to its delivery over 2026-2031. This Growth Plan is closely aligned with national and local economic strategies, cementing Cornwall's position at the heart of the UK's Net Zero and economic growth ambitions.

The UK's Modern Industrial Strategy 2025 cites Digital & Technologies, Clean Energy, Defence and Advanced Manufacturing as Priority Sectors. The marine sector in Cornwall sits at the intersection of these national priority sectors that are increasingly converging in maritime applications especially those related to technology innovation and clean energy.

The Cornwall Good Growth Plan highlights marine as a Distinctive Sector, a priority area for investment, including in ports and harbours, clean energy, new technologies and infrastructure, such as those needed to support the developing floating offshore wind industry.

15 Priority Actions, including two flagship marine infrastructure developments, are presented as the cornerstones of this Growth Plan.

The Priority Actions are wide ranging, including marine infrastructure development, business support, skills support and strategic collaboration. Established through intensive consultation with industry and stakeholders, these include pioneering developments which are expected to set new standards nationally and internationally.

This Growth Plan also sets out a road map for investment in the Cornwall marine sector and a master plan for how the Cornwall Marine Sector Growth Plan is advanced over time.

This includes calling for the development of a new detailed Ocean Industrial Strategy for Cornwall. This would set out to protect and enhance the long-term health of our greatest asset, the ocean. Although integrated Ocean Strategies have been created internationally, notably in Canada and Norway, there is no comparable strategy which has so far been created in the UK. We therefore call for the development of the UK's first Ocean Industrial Strategy within our Priority Action Plan. This will be a significant collaborative project and will further demonstrate Cornwall's world leadership in the marine industry.

Within this document, we have also taken the opportunity to showcase some of our leading marine businesses which are making waves across the world. Both in its breadth and depth, 'Cornwall's Marine Future' is an important and exciting document, that sets the direction for the marine industry in Cornwall for the next five years as well as laying foundations for decades to come.

Credit: ARC Marine®

EXECUTIVE SUMMARY

‘Cornwall’s Marine Future’ sets out the Priority Actions designed to grow the sector between 2026-2031 and lay the foundations for subsequent sustainable growth.

This Growth Plan is fully aligned with local, national and sectoral strategies, and has been informed by extensive research and consultation with businesses, sector organisations, academia and local government.

It includes analysis of the marine sub-sectors and highlights significant activity in each.

10 Key Opportunities have been identified, leading to 15 Priority Actions.

The 15 Priority Actions span marine infrastructure, business support, skills support and sector coordination.

These can be summarised as follows:

MARINE INFRASTRUCTURE

Secure capital investment to expand, repurpose and sustain ports and harbours.

Land a cable from the Celtic Sea to enable development of future fuels including hydrogen and its derivatives, and synthetic fuels. (A transmission connection to Cornwall could supply renewable power for green hydrogen production and other clean fuel processes, supporting the region’s efforts to decarbonise industry and transport).

MARINE BUSINESS SUPPORT

Expand Marine Enterprise Zone area and incentives to counter imbalance of Freeports.

Support businesses with growth potential to increase productivity and international trade.

Support businesses to access R&D, technology testing environments and capital investment for alternative fuels, shore power and decarbonisation of vessels, ports and harbours.

Support businesses to access investment in advanced marine manufacturing, to include AI adoption.

Support businesses specialising in technologies such as autonomous marine technology including vessels to exploit emerging Defence opportunities.

Develop and launch digital marine SME support resources, linked to regional and national developments via Maritime UK Regional Clusters.

Develop and deliver the new Fisheries and Coastal Fund, aligning this with the strategic vision of the Cornish Fishing Strategy 2022.

MARINE SKILLS SUPPORT

Develop programme of targeted provision through Cornwall and Isles of Scilly People Hub and FE/HE/ Independent providers.

Innovate career guidance and employability skills; support employers in creating job pathways.

Deliver new models for employer-led training and related facilities.

MARINE SECTOR COORDINATION AND COLLABORATION

Continue to coordinate local, regional and industry stakeholders and develop a stronger single leadership voice for the sector as well as distinctive USPs and sector proposition.

Update and develop research base to provide a clear and consistent dataset for the sector.

Develop a private sector-led Cornwall Industrial Ocean Strategy 2050, balancing sustainable use with protection of the marine environment.

‘Cornwall’s Marine Future’ sets out indicative costs, timings and success outcomes for each of these 15 Priority Actions.

The next stage is to agree full plans, identify and source funding and agree delivery mechanisms for each initiative. This will include assessing potential alignment with Kernow Industrial Growth Fund and other funding sources.

THE CORNWALL MARINE SECTOR: KEY FACTS

The geography of Cornwall with a coastline of over 400 miles and sea on three sides, together with a deep traditional maritime heritage, makes it a natural home for a thriving marine sector. The sector spans eight sub-sectors, ranging from marine technology to aquaculture.

The marine sector is one of the 'Distinctive sectors' recognised by the Cornwall and Isles of Scilly Economic Forum in their Cornwall Good Growth Plan (2025).

There are **805 marine companies** in Cornwall and the Isles of Scilly employing **16,052 people**, with a **total GDP of £1.12 Billion per annum** (Source: University of Exeter research, 2021). The majority (92%) of marine businesses are clustered around the main ports, which include Falmouth and Penzance / Newlyn. (It should be noted that this is a wider definition of the marine sector than in the Cornwall Good Growth Plan and includes activity that in the Cornwall Good Growth Plan is counted under other sectors, including renewable energy, fishing and parts of the visitor economy.)

The marine sector is now poised to embrace new opportunities such as those linked to the decarbonisation of vessels and sea transportation, floating offshore wind developments and autonomous vessels.

Cornwall has a number of marine assets that position it to take full advantage of the new opportunities emerging.

- Longest coastline of any county in England at 422 miles.
- Strategically placed in North Atlantic with the potential for world class ports and harbours.
- Falmouth Harbour is the third deepest natural harbour in the world and the deepest in Europe.
- Cornwall is the UK's number one hotspot for seafood.
- Cornwall Marine Network (CMN), recognised by Maritime UK as a 'Coastal Powerhouse', with over 20 years of business support initiatives that have directly created 5000 new jobs.
- Cornwall Marine Academy (through CMN) for engaging with and preparing young people for jobs.
- Cornwall Marine Enterprise Zone.
- An exceptional and diverse marine natural environment.
- Strong track-record of R&D within the sector.
- Three rounds of Innovate UK Launchpad funding for marine and maritime cluster across the South West.
- Rich in maritime history with a deep cultural connection to the sea.
- A thriving coastal tourism industry.
- An aligned and growing Aero and Space cluster to support ocean observation.
- Research and innovation support from University of Exeter, University of Plymouth and Offshore Renewable Energy (ORE) Catapult, including world class testing facilities e.g. The University of Exeter's DMaC (Dynamic Marine Component test facility) and FaBTest (Falmouth Bay test site) and University of Plymouth's COAST Laboratory for wave and current testing and Autonomous Systems Test Laboratory for robotics.
- Proximity to Plymouth and the potential 'Defence dividend' arising from increased UK Defence spending, including at Devonport, which creates new supply chain opportunities in Cornwall.
- Capacity and capability at Falmouth Docks, including the ongoing relationship with the Ministry of Defence for supporting defence vessels.

THE OPPORTUNITIES

Here are the 10 key opportunities for the marine sector in Cornwall and the Isles of Scilly for focus over the next five years.

1. **To modernise, decarbonise and expand the capability of Cornwall's ports and harbours**, including creating deeper water access and hard-standing areas, in order to maximise opportunities linked to offshore renewables, boat building and ship repair, defence, advanced manufacturing, marine transport and the cruise market. This will be underpinned by upgraded grid connectivity and electrification of ports and harbours. Shore power and the generation, storage and bunkering of Future Marine Fuels are also areas of opportunity with harbours and ports in prime locations to support maritime fuel transition.

2. **To increase the global competitiveness and export trade of the advanced marine manufacturing sub sector**, which includes ships, boats, superyacht tenders, equipment, engineering solutions, goods and components, through a focus on clean propulsion systems, digital and AI adoption, and advanced materials.

3. **To become a global leader in Marine and Offshore Resources:** A major opportunity for Cornwall's marine sector lies in marine renewable energy, including Floating Offshore Wind (FLOW) in the Celtic Sea, with Cornwall's deep-water ports, such as Falmouth and Hayle, serving as logistical bases for construction, maintenance, and research. The expansion of offshore renewables offers substantial potential for job creation, supply chain development, and inward investment. Tidal and wave energy technologies are also a significant opportunity.

4. **To strengthen Cornwall's position at the forefront of the 'blue tech' revolution:** Cornwall has emerged as a hub for marine technology, with a growing cluster of businesses specialising in marine engineering, robotics, and data analytics. The University of Exeter provides research expertise and support for start-ups and RD&I businesses, fostering a culture of innovation and growth. Key areas of research include autonomous vessels, marine sensors, and digital mapping, all of which have applications in offshore energy, defence, shipping, and environmental monitoring. By leveraging its research capabilities and encouraging collaboration between academia and industry, Cornwall can cement this position further. Combining this with a focus on developing Cornwall's R&D infrastructure linked to investment support through marine technology test environments will enhance this opportunity to develop and accelerate leading edge innovations.

5. **To become a national powerhouse for the development of Future Fuels.** Driven by Net Zero imperatives, there is increasing focus on the development of Future Fuels. This includes the development of transition fuels such as biofuels/ HVO, shore power, Green Hydrogen (and derivatives) and ethanol. Landing a cable from the Celtic Sea into Cornwall would enable the development of future fuels including green hydrogen and its derivatives, synthetic fuels and bio-fuels. A new R&D centre for alternative fuels in Cornwall would provide a focus for innovation and a national magnet for talent.

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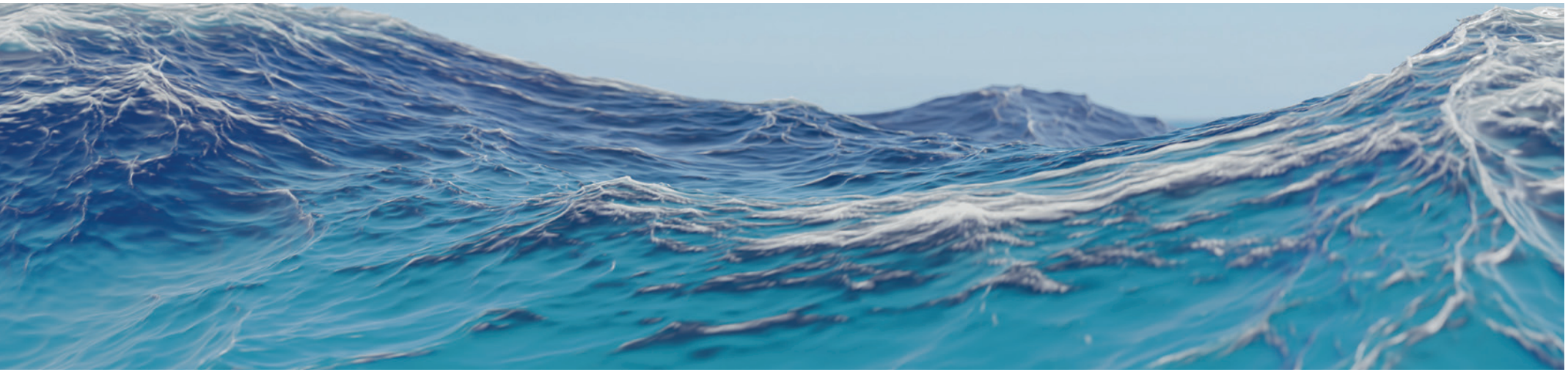


6. **To develop Cornwall's strengths in sustainable fisheries and aquaculture.** Working to progress the actions in line with the Cornish Fishing Strategy's four pillars is key. Specific opportunities include launch and growth of the Cornwall Fisheries Science Board; promotion of Cornish seafood to grow market opportunities and fish prices, promoting national food security, linking with the Defra Food Strategy. In addition, there are opportunities to modernise port and supply chain infrastructure and equipment. Careers will be developed through developing multiple workstreams with the Young Fishermen Network, enhancing the training provision from Seafood Cornwall Training, using the new training facility in Newlyn.

7. **To develop and promote marine leisure**, including eco-friendly recreational activities (e.g. coastal walks, water sports, wildlife watching) developing the potential of Cruise, and developing the 'Blue Health' opportunity, exploiting the growing interest in health and wellbeing by promoting the health benefits of the Cornish marine leisure sector, both to visitors and residents, for example through innovative social prescribing schemes. By investing in marine protected areas and marine leisure, Cornwall can both preserve its natural heritage and attract visitors seeking authentic, responsible travel experiences. This approach not only sustains the local economy but also supports wider environmental goals.

8. **To exploit emerging opportunities in Defence**, including working with Team Plymouth, a new partnership between defence, industry, academia, local and national government. In the Defence Industrial Strategy, Plymouth was named as one of five areas highlighted for defence-based place growth, delivering a potential 'defence dividend' for Cornwall. Investment into Devonport presents a supply chain opportunity for marine and advanced manufacturing businesses in Cornwall, as well as opportunities in R&D, autonomous systems and marine cyber security. Defence opportunities also include maintenance and refit, building on existing Royal Navy support contracts delivered by A&P at Falmouth Docks and Penzance Dry Dock expertise in refitting smaller vessels, such as the UK Border Force fleet.

9. **To develop an employer-led Marine Skills, and Workforce Development programme fit for the future:** There are significant opportunities to expand vocational training, short business courses, pre-apprenticeships, apprenticeships and higher education programmes focused on marine science, engineering, and environmental management. Industry partnerships with schools (starting at primary school level), colleges, independent training providers, universities, and groups such as TecGirls, will help to build interest in STEM careers and align skills provision with marine employer needs, ensuring that Cornwall remains competitive in attracting talent and investment.

10. **To improve and develop the external marketing of the Cornish marine sector** in order to **a)** increase trade, **b)** attract visitors and **c)** attract investment, including from UK government, by developing stronger Unique Selling propositions, including developing place-based opportunities and stronger identities for marine clusters across Cornwall, learning from marine clusters internationally, e.g. Norway which has established marine clusters with strong local identity, such as Stavanger. In addition, to drive visitor traffic, there is an opportunity to help deliver a new solution to the Local Visitor Economy Partnership.

BUSINESS SPOTLIGHT: MOREK ENGINEERING

Morek Engineering is a pioneering company at the forefront of technical engineering for the blue economy, exporting globally from their base in Cornwall. They specialise in robust mooring design, offshore construction planning and execution for the fast-growing marine renewables industry, spanning floating offshore wind, wave energy and tidal energy.

The UK Government awarded funding to a Morek-led consortium to design a new class of low-carbon installation vessel for the floating offshore wind market. The consortium won the funding through the UK Government's Clean Maritime Demonstration Competition based on their proven track record in innovative vessel design and delivery of complex offshore operations. (The consortium includes other businesses based in Cornwall and the South West - Solis Marine Engineering, Tope Ocean, First Marine Solutions and Celtic Sea Power.)

Morek MD Bob Colclough said, "This is a first-in-class low-carbon vessel designed specifically to meet the complex installation requirements of floating offshore wind farm moorings and foundations. The Future FLOW Installation Vessel design incorporates low-carbon fuels providing fuel efficiency advantages, a hydrodynamically optimised hull and expanded mooring capacity. Our goal was to pinpoint where we could deliver the greatest carbon reductions in the construction of future floating wind farms. We are aiming to be included in the national shipbuilding strategy, cementing the UK position to deliver Net Zero 2050."

MOREK ENGINEERING

THE RISKS

It is important to recognise the Risks attached to the realisation of the Opportunities outlined above:

The top 5 strategic risks of the Marine Sector Growth plan have been identified as follows:

1. **Fragmented Governance and Coordination.** Multiple agencies and overlapping strategies risk duplication, slow decision-making, and unclear accountability.
   Mitigation: Establish a governance structure to align all marine programmes and strategy work under shared outcomes and single reporting framework.
2. **Infrastructure Gaps – Ports, Harbours and Grid.** Limited port capacity, grid constraints, and lack of deepwater access threaten marine energy, fisheries, and tourism ambitions.
   Mitigation: Accelerate port modernisation (Falmouth, Hayle, Newlyn); secure grid upgrades; attract joint investment via Crown Estate and National Wealth Fund.
3. **Funding and Investment Uncertainty.** Short-term funding cycles and lack of long-term capital plans risk fragmented delivery and loss of private investment.
   Mitigation: Develop a 10-year funding framework combining public, private, and Crown Estate revenues and national Blue Economy priorities.
4. **Workforce and Skills Shortages (including Housing Pressure).** Shortage of skilled labour and lack of affordable coastal housing constrain sector capacity and talent retention.
   Mitigation: Work with FE/HE and employers to develop skills requirements; align housing delivery with workforce plans; promote local “blue careers” pathways.
5. **Environmental and Biodiversity Pressures.** Growth in offshore energy, tourism, and fishing risks cumulative harm to marine ecosystems and loss of social licence.
   Mitigation: Embed nature-positive design and marine net gain; invest in coastal resilience and restoration projects.

STRATEGIC CONTEXT SUMMARY

Cornwall's marine sector is strategically positioned to deliver on the key national and regional economic objectives outlined in the **Modern UK Industrial Strategy (2025)**, the **Maritime 2050 Strategy (2019)**, and the **Cornwall Good Growth Plan (2025)**. This centres on achieving net-zero emissions, driving advanced technology, and fostering inclusive, high-skilled growth across coastal communities.

DRIVING DECARBONISATION AND CLEAN ENERGY

The most direct alignment across all three policies is the push for Net Zero and a Clean Energy future, a core mission of the Industrial Strategy and Maritime 2050.

- **Ports, Harbours, and Marinas** directly support this by implementing decarbonisation of their own operations and providing the necessary infrastructure for Future Fuels (electric, hydrogen) to visiting vessels. This is foundational to Maritime 2050's goal for zero-emission shipping and the Cornwall Good Growth Plan's aim for a zero-carbon smart grid and accessible green infrastructure.
- **Boatbuilding and Ship and Boat Repair** contributes by providing the critical skills and infrastructure for the decarbonisation of vessels—a central recommendation of Maritime 2050. Their supply chain focus aligns with the Industrial Strategy's emphasis on building robust domestic capabilities and the Good Growth Plan's goal of expanding high-performing, specialized sectors.
- **Marine and Offshore Resources** is the most significant economic driver for this agenda. The focus on Floating Offshore Wind (FLOW), Wave, Solar, and Tidal energy is central to the Industrial Strategy's commitment to clean energy investment. It directly supports Maritime 2050's objective to leverage the maritime sector as an enabler for renewable energy and is a top-tier Clean Energy Resources opportunity in the Cornwall Good Growth Plan, promising to deliver a decarbonised and sustainable economic future for the region.

FOSTERING INNOVATION AND TECHNOLOGY

The sector strongly aligns with the Industrial Strategy's Ideas foundation and Maritime 2050's Innovation theme.

- **Marine Technology, Data and Autonomy** embodies this entirely, focusing on cutting-edge areas like Data, AI, Robotics, and Cyber Security. This directly addresses Maritime 2050's call for a digital by default UK maritime space and the Industrial Strategy's push for R&D in emerging sectors. For the Cornwall Good Growth Plan, this is a distinct opportunity to exploit its unique physical and intellectual assets, creating a thriving Marine Technology cluster.
- **Marine Manufacturing and Engineering** acts as the crucial link between innovation and industry. Its focus on Robotics and Marine Data enables the adoption of advanced manufacturing processes necessary for national resilience (Industrial Strategy) and for supporting the fast-growing autonomy sector.
- **Fisheries and Aquaculture** adopts an innovation focus to promote sustainable food security. By focusing on new technologies in Aquaculture, the sector aligns with the Industrial Strategy's support for innovation in primary production and the Good Growth Plan's drive to develop specialized sectors responsibly.

DELIVERING INCLUSIVE GROWTH AND SUSTAINABILITY

All marine sub-sectors contribute to the Cornwall Good Growth Plan's central tenet of inclusive and environmental growth, which complements the Industrial Strategy's Place foundation and Maritime 2050's emphasis on people and the environment.

- **Marine Leisure, Tourism and Health** is a key delivery mechanism for inclusive growth, leveraging the Blue Economy to diversify the visitor economy and link to community well-being initiatives (Blue Health).
  This supports the Good Growth Plan's ambition to be a global leader for low-carbon experiences, directly engaging coastal communities.
- **Marine Conservation and Biodiversity** provides the foundational layer for sustainable growth. Its focus on coastal protection and ecosystems and Governance ensures that economic activity is managed responsibly. This critical area underpins the environmental pillar of the Industrial Strategy and the core vision of the Cornwall Good Growth Plan: to have a sustainably managed maritime environment that is well understood and globally renowned. By safeguarding its natural assets, Cornwall ensures the long-term prosperity of its entire marine economy.

  Additionally, the Cornish Marine sector is strategically aligned to a range of other National, Regional and Local Strategies, the detail of which is covered in Annex 4.

KEY MARINE SUB-SECTORS IN CORNWALL

The following are identified as the eight key marine sub-sectors in Cornwall.

Ports, Harbours and Marinas

Boatbuilding and Ship and Boat Repair

Marine Engineering and Manufacturing

Marine Leisure, Tourism and Health

Marine Technology, Data and Autonomy

Marine and Offshore Resources (Floating Offshore Wind, Wave, Tidal)

Fisheries and Aquaculture

Marine Conservation and Biodiversity

A brief description of each of these sub-sectors follows.

UNCREWED SURVEY SOLUTIONS. © PT CREATIVE

PORTS, HARBOURS, AND MARINAS

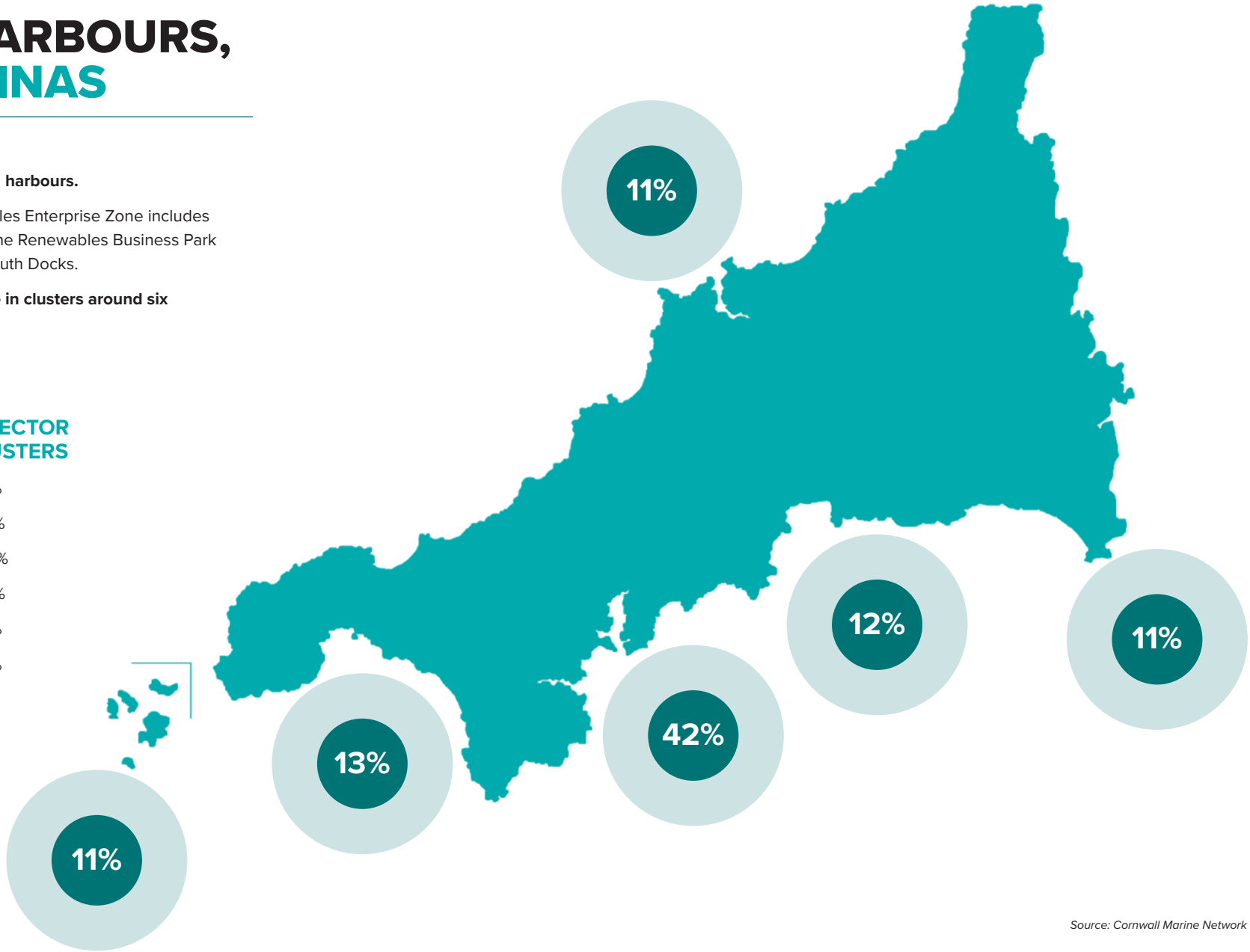
Cornwall has **48 key ports and harbours.**

The Cornwall Marine Renewables Enterprise Zone includes multiple sites such as the Marine Renewables Business Park in Hayle, Tolvaddon and Falmouth Docks.

92% of marine businesses are in clusters around six locations as shown below:

CORNWALL MARINE SECTOR 6 KEY ECONOMIC CLUSTERS

Isles Of Scilly	**11**%
Penzance / Newlyn	**13**%
Falmouth / Penryn	**42**%
Fowey/Par	**12**%
Padstow/Wadebridge	**11**%
Torpoint/Millbrook	**11**%



Source: Cornwall Marine Network

THE SIX KEY MARINE CLUSTERS

FALMOUTH HARBOUR

Isles of Scilly: Marine businesses include crucial transport services, leisure and tourism operations like boat hire and tours, cruise, traditional fishing, and marine support services. The Isles of Scilly Steamship Group provides a lifeline service to the mainland.

Penzance/Newlyn: Activities include ship repair at Penzance Dry Dock, sail making, marine engineering and boat supplies. This is also home to one of the UK's largest fishing fleets, an important player in the Cornish fishing industry, which supports about 8,000 jobs.

Falmouth/Penryn: Hosts a wide range of activities, from superyacht design and construction to ship repair and commercial operations like cargo handling and deep-water bunkering in Falmouth Harbour. Home to an extensive leisure marine sector, consisting of boat builders, marinas and sailing in some of the most famous waters in Europe. Falmouth is also building a strong relationship with the cruise industry, with 50 cruise ships visiting in 2025 and projections for year on year growth.

Fowey/Par: A deep-water port operation dominated by the export of China Clay, aggregates, and rock salt, primarily by Imerys Minerals. Fowey Harbour also supports a thriving recreational and yachting scene, managing the needs of commercial vessels and visiting yachts as well as cruise ships (15 cruise ships visited in 2025.) Par Docks handles bulk materials and serves as a connection point for the rail transport of these exports.

Padstow/Wadebridge: The marine business sector in this area of Cornwall is a mix of leisure and commercial activities, with Padstow focusing on fishing, aquaculture, and tourism, and Wadebridge offering boatyard services, marine engineering, and supplies for both commercial and leisure users.

Torpoint/Millbrook/Looe: Marine business centres on leisure marine and marine services, with specific businesses like Torpoint Yacht Harbour and the Multihull Centre providing facilities for boat owners, alongside a number of marine engineering, boat building and boat repair businesses.

FALMOUTH HARBOUR

BUSINESS SPOTLIGHT: FALMOUTH HARBOUR

As the third deepest natural harbour in the world, Falmouth Harbour is nationally important: It is the UK's first and last major port strategically located in western approaches, offering rapid access to or from the North Atlantic.

Falmouth Harbour offers shelter and port services for vessels of all sizes that are, arriving or departing, awaiting orders and supports a diverse range of commercial, leisure and environmental activities.

The Port of Falmouth is a centre for ship repair, refuelling, and logistics, with facilities such as A&P Falmouth providing dry-docking, engineering and marine services, including UK Navy fleet repair and support work. It is also an important player in the cruise industry, serving as a port of call for over 50 cruise ships a year. A&P Falmouth is delivering a £12m 'Green Shore Power Project' which is providing electricity to ships at berth. Funded by the UK Government's Zero Emission Vessels and Infrastructure scheme, this is achieving the UK's first flexible, multi-vessel shore power connections.

Significant investment is also being made to prepare Falmouth as a key hub for offshore renewables. A £100m project to create 30,000 square metres of dockside space for a FLOW marshalling facility at Falmouth Docks is underway. This is part of the ongoing regeneration of Falmouth Docks, including refurbishment of dock infrastructure, modernisation of ship repair facilities and the creation of new marine engineering hubs.

Falmouth Harbour is additionally home to Pendennis Shipyard, one of the world's leading superyacht refit and custom build facilities and Keynvor MorLift Ltd marine contractors, global specialists in shoreline, coastal and offshore marine services and operations.

Falmouth Harbour has been the focus of many innovative projects, including the Clean Maritime Demonstration Project, a government initiative aimed at accelerating the decarbonisation of the UK's ports and shipping, through which Falmouth Harbour trialled hybrid and electric propulsion systems for harbour vessels.

The Harbour is also seeing increasing demand for offshore renewables testing via its offshore test site FABTest. In addition, the harbour has partnered with local conservation groups to restore and protect sensitive marine habitats, including seagrass and maerl beds.

CEO Miles Carden says: "The harbour's ability to balance commercial shipping growth alongside the stewardship of the marine environment, whilst supporting emerging industries like offshore renewables, and commitment to both community and ocean wellbeing position Falmouth Harbour as a model for other ports in the UK and beyond."

BOATBUILDING AND SHIP AND BOAT REPAIR

The highest employment areas within the commercial marine sector in Cornwall are manufacture, repair, and maintenance of ships and boats, followed by building of pleasure boats and marine fishing. Cornwall is home to around 65 boat builders, with global reputations for craftsmanship and technological innovation.

This sub-sector is divided into the following:

a) **Ship Repair:** Major facilities handle large-scale ship repair and servicing, including contracts for naval vessels.

b) **Superyachts:** The region is a world-class hub for superyacht and superyacht tenders construction, refit, and restoration.

c) **Commercial Vessels:** Building and repairing fishing boats and other commercial craft.

d) **Leisure Craft:** Manufacture of custom and production yachts and motor launches.

Driven by environmental imperatives, the development of alternative marine fuels is a key focus in this sector, to contribute to the Maritime 2050 goal of clean shipping.

Key Hubs include:

Falmouth: A&P Falmouth (Ship Repair) is a major ship repair company that provides servicing contracts, including for naval vessels.

Pendennis Shipyard: One of the world's leading custom superyacht refit and custom build facilities, handling large vessels up to 100 metres. The company employs over 550 skilled tradespeople. Pendennis has an international reputation for refit, restoration, and bespoke superyacht construction.

The wider Falmouth area, including Penryn and Gweek, also hosts numerous smaller, world-class boatyards and marine specialists like Falmouth Yacht Brokers, Falmouth Boat Co and Gweek Classic Boatyard., focusing on boat repair, refit, and restoration of yachts and launches, sometimes including classic vessels.

Mylor Yacht Harbour: A hub with comprehensive boatyard specialists.

Padstow Boatyard: An independent boatyard focusing on custom Glass Reinforced Plastic boatbuilding, vessel modernisation, and repair for commercial fishing boats, sailing yachts, and ferries, handling vessels up to 150 tonnes.

Penzance: Home to Penzance Dry Dock, a traditional yard with a long history that has been completely upgraded following a recent £6m investment. It provides building, repair, refit, and conversion services for a range of vessels, including commercial fishing boats (for which it is a leading repair yard), passenger ferries, and superyachts. It can accommodate vessels up to 75 metres in the Dry Dock.

Fowey/Polruan: The area around the Fowey estuary hosts smaller but significant boatyards, such as C Toms & Son Ltd in Polruan, a family business focused on building and repairing fishing boats and commercial vessels, often using both traditional materials like wood and modern ones like steel. The company also offers services for local and visiting yacht owners.

THE DUCHY 35. CREDIT: COCKWELLS

BUSINESS SPOTLIGHT: COCKWELLS

Cockwells Modern & Classic Boatbuilding designs and builds some of the finest motor yachts and superyacht tenders in the world. From humble beginnings as a small, family-run boatbuilding company, they have grown to employ over 150 skilled professionals, crafting exceptional boats for a highly discerning global clientele.

Their range includes:

Duchy Motor Launches: Classic motor yachts designed for cruising and relaxing in style.

Hardy Motor Yachts: Rugged vessels that combine traditional craftsmanship with innovative design and outstanding performance to create the ultimate ocean cruising experience.

Superyacht Tenders: Meticulously crafted, custom-built tenders that embody exquisite luxury and superlative style whilst pushing the boundaries of construction, electronics and engineering.

Cockwells is constantly developing and refining its range. Recent additions include the Hardy 45 European, an ocean-going motor yacht that is also capable of cruising inland waterways. This dependable yacht combines the robust design of the Hardy range with all the contemporary characteristics and technological innovations of a 21st century craft.

Founder Dave Cockwell says: “With our wealth of knowledge, reputation for excellence and exemplary customer service, Cockwells is ideally placed to create craft of the highest quality to meet the precise requirements of its clients as well as its own exacting standards. As we expand the range of high-end craft that we design and build, we continue to invest in the company and our workforce, and create new career opportunities for the next generation.”

MARINE MANUFACTURING AND ENGINEERING

Cornwall's Marine Engineering and Manufacturing sector is a crucial component of the overall maritime industry, employing **an estimated 8,500 people** extending far beyond traditional shipbuilding to encompass advanced technology, services, and making a significant economic contribution. **This highly innovative sub-sector is central to the country's national economic, defence, and environmental strategy.**

The core activities and specialisms are:

Marine Engineering: Companies provide services spanning design, fabrication, and repair for various vessels and marine structures, including specialised areas like fluid management systems, subsea geotechnical surveying and offshore renewables.

Marine Civil Engineering: Expertise includes coastal protection works, renovation of sea walls and harbour infrastructure, and management of inland waterways.

Cornwall is proactively driving innovation in marine technology. The sector is focused on clean growth, with companies exploring and developing electric vessels and technologies for marine renewables. The region is strategically positioned to be a major player in the development of the UK's Floating Offshore Wind industry in the Celtic Sea. This presents a significant opportunity for the marine engineering and manufacturing supply chain.

The sector requires highly skilled employees, with specialist roles such as engineers attracting higher than average salaries for Cornwall. There is a focus on developing local skills to meet the industry's needs, particularly for the growth in marine engineering and renewables.

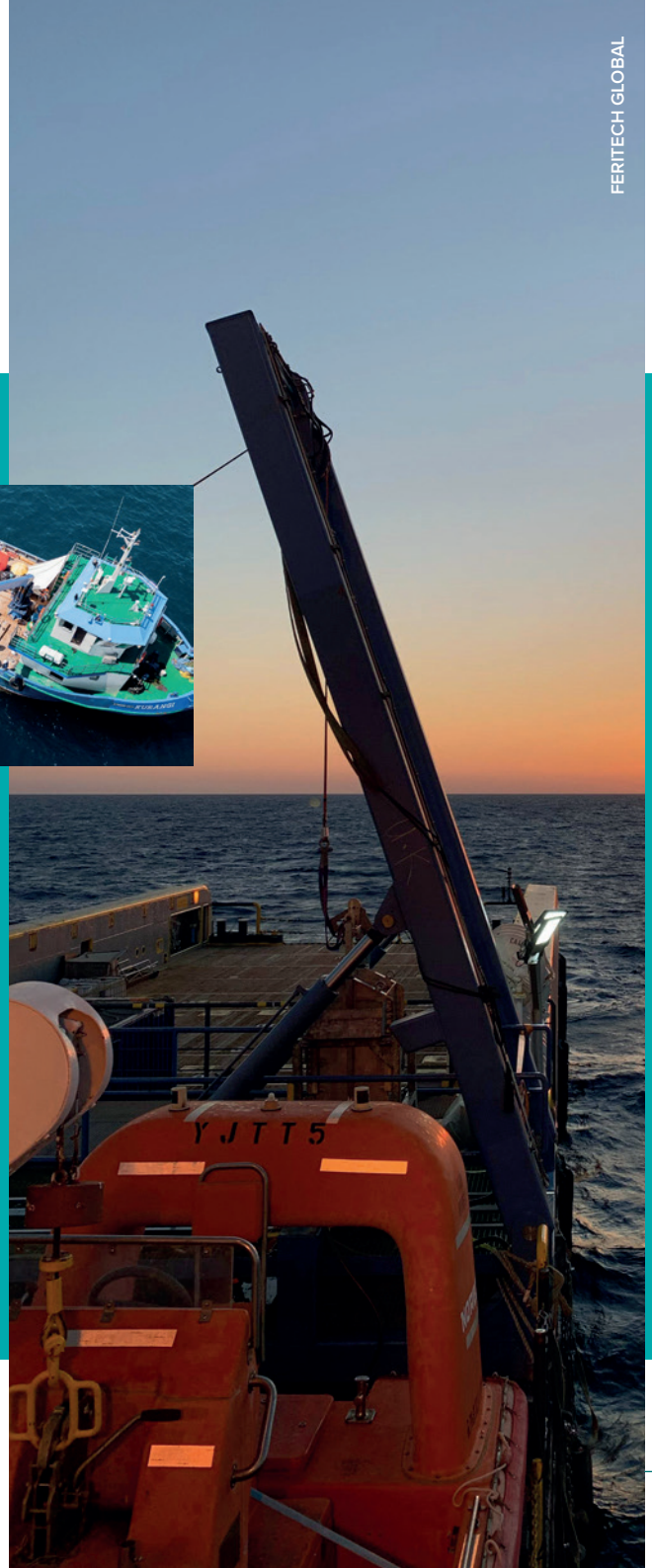
BUSINESS SPOTLIGHT: FERITECH GLOBAL


FERITECH GLOBAL

Feritech Global built its reputation by carrying out marine geotechnical surveys. This typically involves going out into deep oceans and sending down specialised equipment to take soil and rock samples from the seabed for analysis. Having gained a reputation for tackling very challenging projects in harsh environments, this created demand for Feritech's advanced engineering skills across a range of different areas, including floating offshore wind.

Feritech's £3m Innovation Centre near Falmouth offers a full range of services including product design, machining, fabrication, electrical, electronics, embedded software, hydraulics and 3D printing services, all under one roof. This is one of the most advanced facilities of its kind in the UK. With customers in more than 40 countries, Feritech received a King's Award for Enterprise in 2023, for its outstanding performance in international trade.

Feritech MD, Mark Smith, says: "We operate in a sector where there is huge growth potential worldwide. The company has a great reputation for innovation and customer service and we look forward to building on that further, leading to more expansion and job creation in Cornwall."



FERITECH GLOBAL

MARINE LEISURE, TOURISM AND HEALTH

The Marine Leisure, Tourism, and Health sub-sector is a significant and growing component of the region's overall economy. It capitalises on Cornwall's extensive coastline, marine environment, and growing focus on wellbeing. ***Blue Health*** refers to the positive impact on mental health and wellbeing from spending time in or by blue spaces like the sea, rivers, harbours, and marinas.

The Marine Leisure and Tourism Sub-Sector represents 17% of the total marine sector in Cornwall. This percentage indicates the portion of the wider marine sector dedicated to leisure and tourism activities, placing it as **the largest sub-sector within the marine economy.** The marine and coastal environment is the primary draw for people choosing the Cornwall as a holiday destination.

There are an estimated **2,520 people employed in the marine leisure sector** in Cornwall. This represents direct employment in boat charter, marinas, water sports centres, and related marine tourism companies. In addition, there are approximately 1,020 to 1,100 volunteers who provide support to the marine sector, including from RNLI (Royal National Lifeboat Institution) crew and shore support; Beach Lifeguards (some of whom are paid, but many volunteer) and Children's Sailing Trusts and other leisure/educational groups.

There is a noted trend of traditional marine businesses, such as fishing operators, diversifying into marine tourism (e.g. fishing trips), which supports the local fishing culture, delivers economic and social benefits, and reduces pressure on fish stocks. There is growing demand for coastal/marine tourism, balancing the growth in leisure/tourism with the sustainable management of the marine environment (e.g. Marine Protected Areas).

Cornwall is also growing its capacity for receiving cruise ships into the region, with over 70 visits from cruise ships in the 2025 season. With an average spend of £80 per passenger arriving in port, this produces a positive economic impact on shops, restaurants and tourist attractions.

This sub-sector also includes ferry companies, which connect communities as well as add value to the visitor experience and support leisure activities (Scilly, King Harry, St Mawes, Torpoint, Rock/Padstow.) It has been identified that many of these operators could move to electric vessels if infrastructure were available, and that improved connections between ferries and the Cornwall public transport system could be created, increasing access to marine leisure opportunities for visitors and residents.

BUSINESS SPOTLIGHT: THE WAVE PROJECT

The Wave Project charity's mission is to improve children's mental health and wellbeing through their award-winning Surf Therapy programme. This is an evidence-based programme that enables children and young people to build confidence and overcome anxiety barriers through surfing. Their work focuses on young people aged 8 to 18 and includes help for those with disabilities, using adaptive surfing equipment.

According to the NHS, one in five young people are experiencing a diagnosable mental health issue. The Wave Project approach is to intervene early, treat young people with respect and focus on a learning activity that they can relate to – surfing. Their Surf Therapy programme is a three step intervention: a six week surf therapy course, membership of Surf Club, then progression to volunteer.

The focus is on creating a space where young people feel safe, supported and free to be themselves. The Wave Project has grown from a charity based solely in Cornwall to one that now operates all over the UK.

Their CEO, Ramon Van de Velde says: "I am very proud to lead the amazing team at The Wave Project. As the parent of a teenage daughter who has faced serious challenges, I know the impact that nature and our work can have on them, and I am very driven to support ever more children with Surf Therapy and the healing powers of the ocean."

MARINE TECHNOLOGY, DATA AND AUTONOMY

This sub-sector is a high-growth area and is a major focus for investment and innovation in Cornwall. Future trends include a shift towards automation, digitisation, and autonomous systems (smart shipping).

The sector is capitalising on the projected global marine autonomy market, expected to be worth £103 billion by 2030. While specific employment data for this sub-sector is unavailable, it represents a growing and highly skilled segment of the overall Cornish marine workforce.

The core capabilities and infrastructure are:

Clean Maritime: A major focus is on Clean Maritime technologies, including the transition to alternative fuel powered vessels, hydrogen propulsion, and integrating ports into a decarbonised energy network.

Marine Autonomy: The cluster focuses on Marine Autonomy, including Unmanned Surface Vessels (USVs), for applications in defence, offshore renewable energy (e.g. floating offshore wind in the Celtic Sea), and ocean monitoring.

Digital Ocean Technologies: This involves the development of advanced sensor and communications technology, system integration, and the use of AI/Machine Learning for real-time data analysis to enhance understanding of the ocean environment.

The integration of autonomy and data science is also relevant to **UK Defence and National Security**. The expertise in the South West, particularly around Plymouth, as a National Defence Growth Area and the National Centre for Marine Autonomy, forms a critical defence and marine cluster, which extends to Cornwall.

- Facilities such as the University of Plymouth's Cyber-SHIP Lab is dedicated to investigating cyber vulnerabilities in modern, autonomous vessels and port systems to enhance national resilience.
- An issue is the security and resilience of Seabed Critical National Infrastructure (CNI), including monitoring and protecting subsea data cables, gas pipelines, and the anchoring/power cables of new offshore wind developments.
- Advanced Marine Autonomous Systems (MAS), initially developed for marine science and commercial applications like offshore energy, possess a crucial 'dual-use' capability. This makes them ideal for maritime security and defence applications, for Anti-Submarine Warfare, Sea Bed Warfare, and Mine Counter Measures.

UNCREWED SURVEY SOLUTIONS. © PT CREATIVE

BUSINESS SPOTLIGHT: UNCREWED SURVEY SOLUTIONS (USS)

Based in Hayle, USS acquires, processes and delivers high-quality marine data using innovative Uncrewed Surface Vessels (USVs).

USS is among an elite, pioneering group of survey data providers using solely uncrewed vessels to execute efficient data acquisition projects. Supporting the Blue Economy and facilitating the wider industry adoption of uncrewed systems, USS is implementing disruptive technology to inspire the USV revolution and accelerate the industry's paradigm shift towards sustainable maritime operations.

Established in 2014, USS has over a decade of USV operational experience and brings together a professional team of maritime experts who have in-depth knowledge of safe vessel navigation and the use of sonars and sensors for survey operations.

USS offers its clients a complete end to end solution, from vessel design to data delivery. Key sectors served include offshore renewable energy, oil and gas, dredging and construction and ports and harbours.

Their CEO, James Williams, says: "Our growing fleet of innovative hybrid USVs are built for rapid deployment today and with ambition for increased capability tomorrow. Proven at sea in the global marine industry, USS offers the optimal cost effective solution whilst reducing carbon emissions."

MARINE AND OFFSHORE RESOURCES - FLOATING OFFSHORE WIND, SOLAR, WAVE, TIDAL

The development of marine and offshore resources, particularly Floating Offshore Wind, Wave, and Tidal energy, represents a significant and emerging economic opportunity for Cornwall. The region is strategically placed to lead this sector (subject to catalytic investment) due to its deep-water ports, established marine industry supply chain, and excellent natural resources. Floating solar in the North Atlantic is also an opportunity to be considered.

Floating Offshore Wind (FLOW) in the Celtic Sea

The Celtic Sea, off the coasts of Cornwall, South Wales and the South West, has been identified as a significant potential area for floating offshore wind (FLOW) development. The Crown Estate's Leasing Round 5 (LR5) has now awarded 4.5 GW of FLOW, with 1.5GW each to; Equinor, Gwynt Glas (a consortium of EDF Renewables and ESB) and Ocean Winds (a joint venture between EDPR and ENGIE). The Crown Estate has also indicated scope for up to 12 GW of additional capacity in years to come.

According to *The Crown Estate's Celtic Sea Blueprint*, delivery of a 4.5 GW FLOW programme could generate around £1.4 billion in Gross Value Added (GVA) and support an average of 5,300 jobs in the UK by the late 2030s. Businesses in Cornwall possess relevant capability for this emerging sector - including in anchors and mooring systems, marine engineering design and offshore operations - but there is a need to build capacity. Targeted and timely investment is necessary if the opportunities are to be realised. If so, there is high export potential in the global FLOW market as well as current opportunities in adjacent sectors, such as fixed wind and defence.

There is also potential for wider integration with other low-carbon technologies. A future Celtic Sea transmission connection to Cornwall could supply renewable power for green hydrogen production and other clean fuel processes, supporting the region's efforts to decarbonise industry and transport.

Overall, the Celtic Sea FLOW programme represents a substantial infrastructure and industrial opportunity, with the potential to deliver measurable economic and employment benefits if supported by coordinated investment in ports, grid connections, supply chain capacity, and workforce skills.

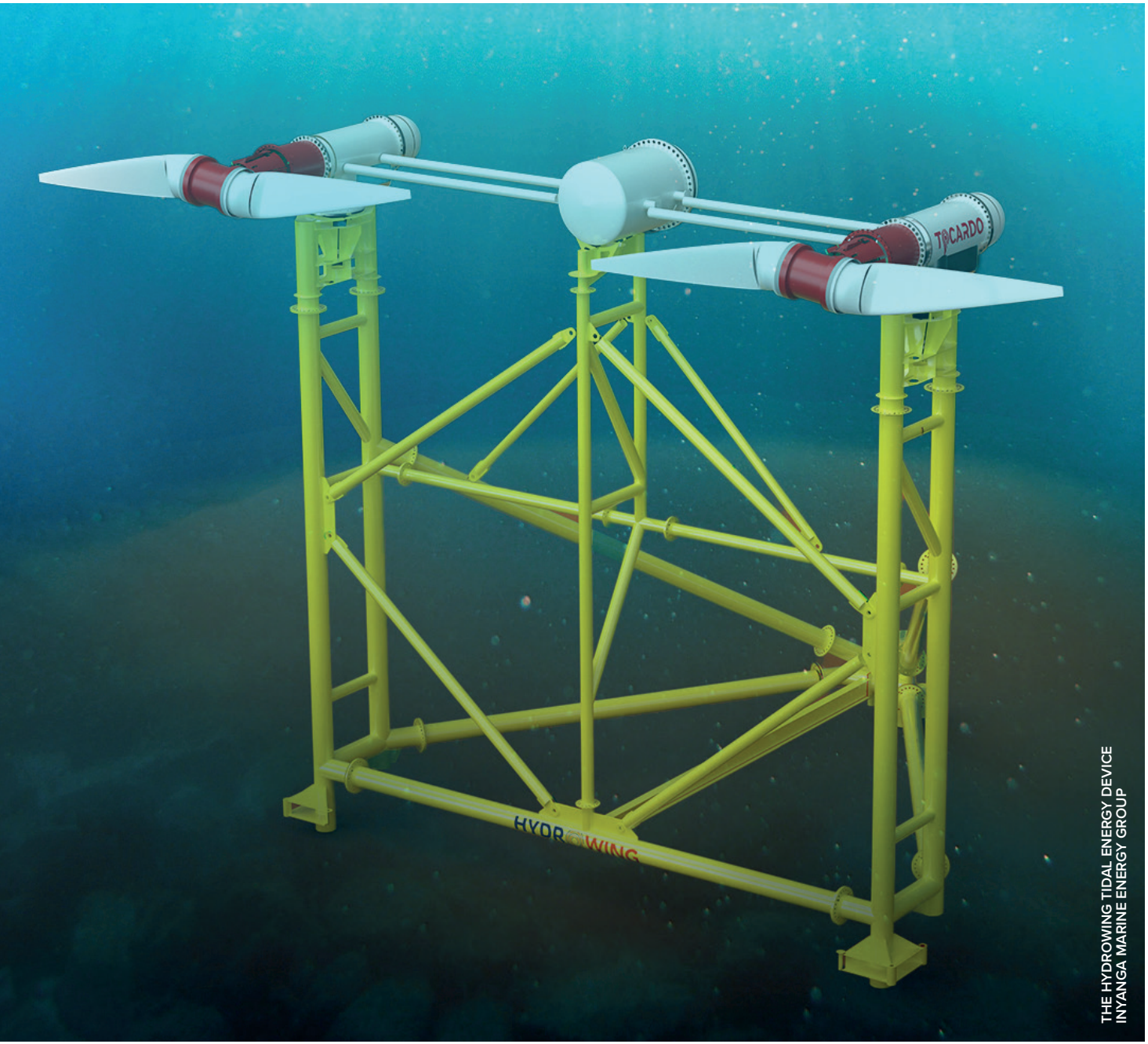
Wave and Tidal Energy

Cornwall has been at the forefront of wave energy development, boasting prime testing facilities that attract international investment. The Wave Hub asset, originally intended for testing wave energy devices has been repurposed for FLOW demonstration. The site retains its existing assets, which include a grid connection, the four-way seabed hub, and an onshore substation.

FaBTest, in Falmouth Bay, is a pre-consented test area intended as a "nursery facility" where developers can test components, concepts, or full-scale devices in a moderate wave climate before moving to larger, harsher sites, as well as utilised for other R&D purposes.

The wider UK wave and tidal sectors have immense potential. The ambition is to create over 20,000 skilled jobs in these sectors in the next decade.

Cornish-based teams are already involved in major national, European and worldwide wave and tidal projects.



THE HYDROWING TIDAL ENERGY DEVICE
INYANGA MARINE ENERGY GROUP

INYANGA TEAM IN SOUTHEAST ASIA

BUSINESS SPOTLIGHT: INYANGA MARINE ENERGY GROUP

Inyanga is pioneering developments in tidal energy. Based in Falmouth, the company now has offices in Anglesey, France and Canada. Its innovative, patented tidal energy converter, called HydroWing, is designed to provide cost-effective, reliable, and predictable power to communities around the globe.

A 20 MW HydroWing tidal energy array is planned for deployment at Morlais off Anglesey in Wales in 2026. This is one of the largest consented tidal energy projects in Europe. Inyanga has also won a contract to deliver Southeast Asia's first tidal power generation plant at Capul in the Philippines. In addition, it has a binding agreement to develop plans for the first tidal current power plant in Indonesia.

The company also has a division called Inyanga Maritime, which specialises in offshore engineering and installation, and provides services to renewable energy clients internationally.

Their CEO, Richard Parkinson says: "Our vision is to become the world leader in tidal array technology."

FISHERIES AND AQUACULTURE

The fisheries and aquaculture sectors are a significant and integral part of Cornwall's economy, culture, and coastal identity.

The total seafood sector in Cornwall (including fishing, processing, and associated industries) has a substantial economic footprint, contributing £174 million to Cornwall's total GVA and supports an estimated 8,000 jobs across Cornwall, including jobs in linked industries such as agri-food and tourism.

2024 fisheries statistics confirm £56 million first sale value; 21,837 tonnes annual landings; 444 commercial vessels and 603 Full Time Equivalent jobs in the catching sector.

It is estimated that for every fisher at sea, there are 15 more jobs onshore in the wider seafood sub-sectors, with five of those related to tourism and hospitality.

Aquaculture in Cornwall is focused on low-impact, environmentally friendly species; primarily mussels, oysters and seaweed farming.

Considerable progress is being made delivering the Cornish Fishing Strategy 2002, the pillars of which are 1) Science and Sustainability, 2) Enhancing Routes to Market and Promotion of Seafood, 3) Careers- onshore and offshore recruitment and retention and 4) Modernising port, harbour and supply chain infrastructure. This progress is highlighted by the CFPO report 'The True Value of Seafood to Cornwall' published in 2024.

In addition, **seaweed-related businesses in the UK have more than doubled since 2016**, driven by consumer perception of seaweed as a healthy and nutritional food.


THE CORNISH SEAWEED COMPANY

BUSINESS SPOTLIGHT: THE CORNISH SEAWEED COMPANY

This company searches the Cornish coast for the highest quality seaweeds. These are then harvested by hand, cutting with scissors rather than ripping the plant, to help with regrowth. The seaweeds are washed, dried and packaged by hand to ensure the best quality by using artisanal practices.

Their aim is to provide consumers with an honest superfood that is sustainably harvested, with local, edible seaweeds and to introduce this as an alternative food source that is healthy, nutritional, tasty and good for the environment.

The company's product line-up features dried, organic seaweeds, including Dulse, Kelp, Sea Salad and Ocean Greens, all of which can be used in a range of tasty recipes. They also supply a variety of health supplements based on ocean plants, which can help support a stronger immune system, healthier bones and skin, and aid with concentration.

The company also cultivates sugar kelp at sea in an existing mussel farm and is currently pioneering a novel seaweed cultivation method on land as well.

Their MD, Tim van Berkel says: "We believe that nourishing and tasty food starts with simple, honest ingredients. Seaweed is one of the most nutrient-dense foods on the planet, naturally rich in iodine, iron, and essential minerals. We deliver it to our customers in its purest form, with no additives or preservatives."

MARINE CONSERVATION AND BIODIVERSITY

Cornwall's waters are recognised as having some of the most diverse marine ecosystems in the UK. Cornwall has a substantial network of Marine Protected Areas (MPAs), including Marine Conservation Zones (MCZs), Special Areas of Conservation (SACs), and Special Protection Areas (SPAs). Cornwall boasts 22 MCZs in its waters, protecting habitats like vibrant rocky reefs and muddy, deep sea beds. The Isles of Scilly has multiple MPA designations, including an MCZ protecting seagrass beds and various reef species.

Cornwall Council has developed a Marine Nature Recovery Framework (MNRF), currently unique in the UK. Linked to the Local Nature Recovery Strategy required by the Environment Act, it supports the nature recovery aims of the above mentioned MPAs and provides a framework to work towards nature recovery. Key to delivering the MNRF is the Marine & Coastal Partnership, hosted by the Cornwall Wildlife Trust. It is a collaborative group consisting of over 53 organisations in place with the aim of working together to achieve nature recovery at scale. This all demonstrates Cornwall's commitment and proactive actions taken to restore nature.

A key driver of sustainable coastal tourism is the link with conservation. Wildlife tour operators (like seal safaris) work directly with organisations like the Cornwall Wildlife Trust to collect scientific data and promote responsible practices (such as WiSE training), creating an economic market for environmentally conscious tourism experiences.

Conservation efforts are vital for securing the long-term viability and market value of the fishing industry.

Marine conservation is a global industry and Cornish businesses such as ARC marine® are also successfully innovating in this area and exporting overseas.


Credit: ARC Marine®

Credit: ARC Marine®

BUSINESS SPOTLIGHT: ARC marine®

ARC marine® is the first eco-engineering company in the UK specialising in nature-based solutions and accelerating reef creation. Their patented innovation, the Reef cube®, is designed and produced using ARC's proprietary "Marine Crete" construction, 98% recycled materials, zero plastics and developed using targeted Nature-Inclusive Design (NID) principles.

Reef cubes® have applications in coastal protection where they can break the force of the waves while creating new habitats in the intertidal area. Within the offshore industry, Reef cubes® are used for scour protection around offshore wind farm monopiles with the NID texture on the surface allowing for an increase in biodiversity levels on site. The technology can also be used to support fisheries production and fisheries management, as well as aquaculture projects.

Designed with the same environmentally friendly conception & intents as the Reef cube®, ARC marine's® Reef mat is a nature-inclusive solution for protecting subsea cables and pipelines while enhancing marine ecosystems.

ARC marine® is active across seven countries, with further projects Europe, the Middle East and Oceania.

Their CEO, Tom Birbeck says: "ARC marine® has developed such a depth of expertise that we now have ambitions to become a global leader in marine eco-engineering and conservation projects, creating lasting benefits for our marine ecosystems."

MARINE GROWTH PLAN
PRIORITY ACTIONS

The Growth Plan sets out a viable and impactful programme to be delivered over the five year period from 2026 to 2031. The impact of the Marine Sector Growth Plan will lay the foundations for growth over the decades ahead.

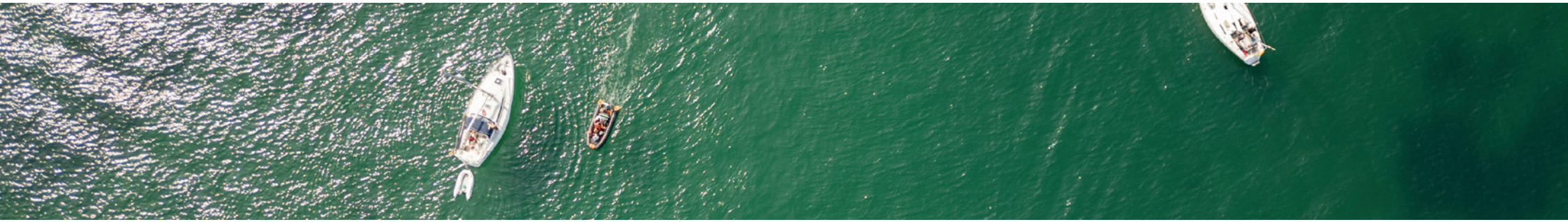
The five-year Growth Plan includes **15 Priority Actions** across marine infrastructure, business support, skills support and sector collaboration and coordination.

The **15 Priority Actions** include **two flagship marine infrastructure projects**, which are expected to be significant catalysts to growth.

MARINE SECTOR 15-POINT GROWTH PLAN

KEY INITIATIVE (not in order of priority)	DELIVERY PARTNERS	SCALE £	TIMESCALE	SUCCESS OUTCOME
MARINE INFRASTRUCTURE				
1 **Secure infrastructure capital investment to expand, repurpose, decarbonise and sustain ports and harbours in order to maximise impact of boat building and ship repair, offshore renewables, fishing and marine transport repairs.**	Cornwall Council (Harbours Board), Commercial Port Authorities (e.g. Falmouth Docks), Cornwall Marine Network (CMN), Celtic Sea Power (CSP), Cornish Fish Producers Organisation (CFPO), Trust Ports such as Falmouth Harbour , British Ports Association, UK Government (DfT/DBT), Private Sector Investors.	£15M - £30M (Phase 1) £75M - £150M (Phase 2)	Phase 1: Feasibility/ Design (2026-2028) Phase 2: Capital (2029-2031)	**Port Readiness:** At least one major deep-water port upgrade capable of servicing Floating Offshore Wind projects is substantially completed and operational. At least One smaller Harbour facility to support smaller offshore vessels and future fuel provision. **Increased Capacity:** 20% increase in capacity for high-value marine manufacturing, repair, and maintenance activities. This is the early stage of a larger and longer term investment required.
2 **Land a cable from the Celtic Sea into Cornwall to enable development of future fuels including hydrogen and its derivatives, synthetic and biofuels.**	CSP, Industry Developers, National Grid, Cornwall Council, The Crown Estate.	2026-2028 (Phase 1) 2029-2031 (Phase 2) Total project £1.6bn. Individual drilling/ landing point £2.5m.	Feasibility & Securing FID (2026-2028), Initial Construction (2028-2030)	**Connection Secured:** Final Investment Decision (FID) is secured, and onshore cable landing and first-stage connection infrastructure is underway. **Green Fuel Production:** First commercial-scale green hydrogen or biofuel production facility development is anchored in Cornwall.

KEY INITIATIVE (not in order of priority)	DELIVERY PARTNERS	SCALE £	TIMESCALE	SUCCESS OUTCOME
MARINE BUSINESS SUPPORT				
3 **Support businesses in the sector with significant growth potential to secure investment to increase productivity, international trade and sustainable growth.**	CMN, CIOS Growth Hub, Cornwall Chamber of Commerce, UK Trade and Investment (UKTI) Ports and Harbours.	£3M - £5M	2026-2031 (and ongoing)	**GVA and Export Growth:** 25% growth in Marine Sector Gross Value Added (GVA) and a measurable increase in international export volume for supported firms.
4 **Expand Marine Enterprise Zone incentives and area to balance impact of Freeports.**	Cornwall Council, CIOS Economic Forum, CMN, Local Planning Authorities.	£1M - £3M	2026-2028	**Incentive Parity:** Marine EZs expand and maintain a competitive advantage in tax, rate relief, and planning against Free-ports. **New Occupiers:** Marine EZ sites achieve 90% occupancy rate.
5 **Support businesses to access R&D, technology testing environments and capital investment for alternative fuels, modernisation and decarbonisation of ports and harbours.**	Innovate UK, University of Exeter, University of Plymouth, Cornwall Council (CIOS Good Growth Team), Port Operators, Marine R&D businesses, private investors, CMN.	£5M - £12M	2026-2031	**Decarbonisation:** Shore power is installed at two major commercial ports. Harbour infrastructure to support future fuels and transition. **Adoption:** Measurable percentage of the commercial marine fleet adopts alternative fuel or electric technologies. **R&D:** Further develop the R&D infrastructure through investment support in technology testing environments.
6 **Support businesses to access investment in advanced marine manufacturing, to include digital and AI adoption and trial and transition to appropriate new technologies as/when available.**	CIOS Growth Hub, CMG, CMN, Advanced Manufacturing Sector Leads, Private Investors.	£2M	2026-2031	**Advanced Manufacturing:** Establishment of at least three new high-value marine manufacturing or AI/digital adoption facilities. **Retrofitting:** Trial and transition through identifying key pilot projects when appropriate technologies become available (recognising constraints of electric propulsion for fishing).



KEY INITIATIVE (not in order of priority)	DELIVERY PARTNERS	SCALE £	TIMESCALE	SUCCESS OUTCOME
7 **Support businesses specialising in technologies such as hydrographic surveys and autonomous vessels to create applications to exploit Defence opportunities.**	Defence and Marine Technology Hubs (South West), Universities, Innovate UK, Regulators, CMN, Private Defence Contractors.	£3M - £10M	2027-2031	**Defence Contracts:** Secured contracts/partnerships with the Defence sector for Cornish autonomous/hydrographic firms. **Technology Demonstration:** Successful trialling of autonomous vessel applications in the Celtic Sea region.
8 **Develop and launch digital national marine SME business support resources to be delivered via Maritime UK Regional Clusters.**	CMN, Maritime UK Regional Clusters, Digital Skills Providers.	£0.5M - £1M	2026-2027	**Digital Uptake:** Digital support platform achieves 500+ active SME users nationally by 2028. **Training Reach:** Online training platform delivers 1,000+ course completions per year.
9 **Work with the fishing and seafood sector to develop the new Fisheries and Coastal Fund, aligning this with the strategic vision of the Cornish Fishing Strategy 2022.**	Cornish Fish Producers Organisation, Seafood Cornwall Training, Seafood Cornwall, Cornwall Harbours, DEFRA, Cornwall Council, Harbour Authorities.	£3.8 million to £5.06 million per year (of £360M UK Fund)	Initial Phase: 2025-2027 (The broader UK Fund runs for 12 years).	**Sustainability & Science:** Launch the Cornwall Fisheries Science Board to enable research, data collection, stock monitoring and provide up to date science and evidence for future decision making and underpin sustainability. **Marketing & Value Added:** Enhancing domestic and export markets via consumer facing Seafood Cornwall platform, educational campaigns and product innovation. **Infrastructure:** Port/Harbour modernisation, supply chain upgrades, innovative processing facilities to ensure retention of Cornwall as UK No. 1 seafood hotspot.

CORNISH FISH PRODUCERS' ORGANISATION

KEY INITIATIVE (not in order of priority)	DELIVERY PARTNERS	SCALE £	TIMESCALE	SUCCESS OUTCOME
MARINE SKILLS SUPPORT				
10 **Comprehensive people and skills offer with targeted provision through C&IoS People Hub and FE/HE/ Independent provider alignment, including accessing Adults Skills Fund to support the marine sector**	People Hub Cornwall CIOS, CMN, FE/HE Providers, DfE/LSIP/DWP/Cornwall Seafood Training, CFPO.	£3M - £8M	2026-2031	**Skills Gap Reduction:** Marine sector businesses report a 50% reduction in difficulty recruiting for key technical roles (e.g. composite manufacturing, marine engineering) and a 25% increase in youth and trainee participation in the traditional fishing sector.
11 **Develop innovative career guidance, employability skills and support employers to create employment pathways.**	CMN, Cornwall Marine Academy (CMA), Careers Hub, Local Schools/FE/HE, Industry Ambassadors.	£1M - £3M (Careers and pre-apprenticeships) £3m (wage Subsidy scheme	2026-2031	**Pipeline Growth:** Place and retain 200+ new employees per year (including pre apprenticeships and apprentices/trainees) in marine sector SMEs through the scheme. **Wage Subsidy Impact:** Achieve 90% retention rate for staff whose entry/upskilling was supported by the subsidy after the first 12 months. **Career Awareness:** 20% increase in applications to marine-related apprenticeships and HE/FE courses.
12 **Deliver new models to enhance employer-led training and associated facilities.**	CMN, Private Sector Employers, DFE	£1M - £5M	2026-2029	**Facility Upgrade:** Delivery of at least one new state-of-the-art marine engineering or composite manufacturing training centre. **Employer Engagement:** Five major marine employers establish accredited in-house training programs.
13 **Coordinate local, regional and industry stakeholders and develop a stronger single leadership voice for the sector as well as compelling USPs.**	CMN (Lead), CFPO, Maritime and Coastal Partnership (MCP), CIOS Economic Forum, Cornwall Council, Maritime UK. Private sector to include Ports and Harbours.	£0.5M - £1M	2026-2027 (Ongoing)	**Single Voice:** Formal establishment of a recognised, single-point industrial leadership body for the Cornwall marine sector. **Lobbying Success:** Secured commitment from central government for a major policy intervention (e.g., tax break, investment fund) for Cornish marine.

KEY INITIATIVE (not in order of priority)	DELIVERY PARTNERS	SCALE £	TIMESCALE	SUCCESS OUTCOME
MARINE SECTOR COORDINATION AND COLLABORATION				
14 **Review and update available research and statistics to provide a clear and consistent dataset for the Cornwall marine sector.**	Cornwall Council (Economic Development), Universities (Exeter & Plymouth), CMN, CFPO.	£0.1M - £0.25M (Annually)	2026-2027	**Data Standard:** Publication of a unified, annual Marine Sector Economic Monitoring Report, used as the authoritative data source by all stakeholders. **Improved Forecasting:** Policy decisions are based on the new consistent dataset.
15 **Oversee development of a private sector led Cornwall Industrial Ocean Strategy 2050, balancing sustainable use with protection of the marine environment.**	CMN Members Advisory Board (Lead), Cornwall Council, Falmouth and other Harbours, CFPO, MCP, Universities, Environment Agency.	£0.5M - £0.75M	2027-2029	**Strategy Adopted:** The private sector-led Cornwall Industrial Ocean Strategy 2050 is published and officially adopted by key public and private sector partners. **Balanced Ocean Use:** Clear, measurable targets are set for ocean health improvement alongside sustainable economic growth.

The next stage is to define and agree timings, plans and delivery mechanisms for each initiative, including identifying potential funding sources such as the Kernow Industrial Growth Fund and others.

The above are the top priorities for the five year period 2026-2031. There are, in addition, several longer-term and ongoing sector requirements that are acknowledged and will feed into future plans.

These include but are not limited to:

- Secure capital investment to enable deeper water access to key ports and protect existing access points.
- Create an R&D Centre for alternative maritime fuels, including developing the use of hydrogen.
- Launch a Coastal Resilience and Environmental Action Programme to audit and invest in addressing pollution sources, improving energy efficiency, and delivering small-scale insulated workspace infrastructure.
- Address Equality and Diversity issues to enabled improved opportunities for people with a disability and migrant workers amongst others.
- Explore opportunities for co-location, delivering environmental and economic benefits.

GOVERNANCE AND MONITORING

Existing partnership structures and focused sub-sector groups will be identified and engaged to inform, provide intelligence and drive the delivery plans for each marine theme.

Where gaps exist, it is proposed that new sub-sector groups are established by Cornwall Marine Network in conjunction with the Cornwall and Isles of Scilly Marine and Coastal Partnership, to ensure that the interests of all sub-sectors are considered.

Overall monitoring and governance of the Growth plan will be overseen by Cornwall Marine Network's Members Advisory Board, which comprises representatives from across the key marine industry sub-sectors.

CMN in turn, will report to Cornwall's economic governance structure through the Cornwall and Isles of Scilly Economic Forum.

THE WAY FORWARD:
CONCLUSION AND NEXT STEPS


UNCREWED SURVEY SOLUTIONS. © PT CREATIVE

'Cornwall's Marine Future' plans the Priority Actions and journey to success. The marine sector is undergoing rapid transformation and the pace of change is intensifying. The opportunities emerging are significant, with international and 'world first' opportunities for Cornish marine businesses.

Next steps to deliver 'Cornwall's Marine Future' are as follows:

- **Disseminate:** Sector wide dissemination of the Cornwall Marine Sector Growth Plan and consultation with all stakeholders to establish detailed plans for each of the key priorities, including identifying and agreeing timetables, costings and funding sources.
- **Coordinate:** a) Identify and coordinate established focused sub-sector groups, feeding in intelligence and coordinating views within each sub-sector to provide a single clear voice for each sub-sector b) Identify gaps in sectoral focus and establish new working groups
- **Support:** Gain local and national government and maritime industry support for proposals
- **Lead:** Obtain approvals to task groups in delivering and monitoring for each of the key initiatives
- **Prepare:** Create a series of projects, agree full timetables, workplans and funding requirements for each priority action
- **Deliver:** Identify and secure funding sources for key initiatives and, once overall plans are agreed, deliver the priorities
- **Monitor:** Put in place a system of quarterly updates to monitor and share progress against the objectives with the CMN Advisory Board, including reporting progress to the Cornwall and Isles of Scilly Economic Forum

APPENDICES

Appendix 1:
PRODUCTION PROCESS

Key elements that have informed this Action Plan are as follows:

a) Desk-based research comprised of a review of existing data.

b) Literature review of policies, reports and strategies to understand the strategic context.

c) Cornwall Marine Network members online business survey (October 2025), a summary of which is provided below.

d) Roundtable with business community held on 21st October 2025 in Falmouth.

e) Various consultations on emerging draft plans with Cornwall Marine Network Board Members; University of Exeter, Cornwall Council, Cornwall and Isles of Scilly Economic Forum, CRCC, Falmouth Harbour Commissioners, Celtic Sea Power and others.

CORNISH FISH PRODUCERS' ORGANISATION

Appendix 2:
BUSINESS SURVEY RESULTS

Cornwall Marine Network carried out a business survey in October 2025, focusing on the marine economy in Cornwall, including business size, growth factors, barriers to investment, and support needs.

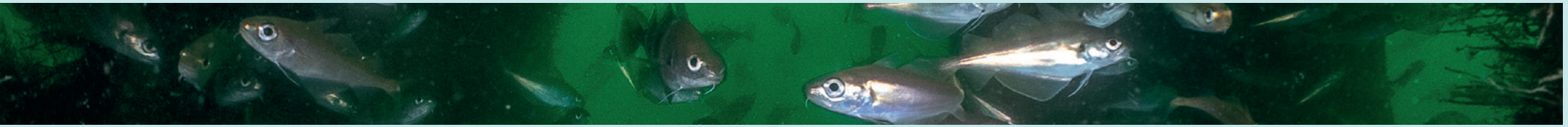
This online survey was sent out to over 800 marine businesses in Cornwall, for which more than 90 businesses commenced and 43 businesses fully completed it. This represents an approximate sample size of 5% of all marine businesses in Cornwall that fully completed the survey (and 11% who started but did not complete). 70% of respondents were existing members of Cornwall Marine Network.

A summary analysis of the key results are as follows:

Business Size and Employment Structure

The survey reveals the distribution of business sizes among respondents in the marine sector.

- 30% are self-employed or sole traders.
- 23% have fewer than 10 employees.
- 20% employ between 10-50 employees.
- 12% have 51-250 employees.
- 10% operate with over 250 employees.



Credit: ARC Marine®

Marine Economy Sectors

The survey identifies the primary sectors of involvement within the marine economy.

- 15% Marine Leisure.
- 12% Marine Engineering.
- 10% Ship repair and Boatbuilding.
- 5% Marine Technology and Marine Conservation.
- 5% Fisheries and Aquaculture.

Business Growth Opportunities

- 24% cited infrastructure development as a key driver.
- 22% mentioned government funding.
- 21% noted advances in marine technology.
- 20% indicated increased consumer demand.
- 19% highlighted environmental sustainability.

There were other mixed opinions on growth in the marine sector in Cornwall; some respondents see no growth, while others identify global trends in the Blue Economy, government funding, affordable access to water, and community engagement as potential drivers.

Challenges to Business Growth:

Barriers to investment and growth include increased NIC and minimum wage costs, lack of infrastructure, and challenges in accessing public grant funding.

- 28% cited access to grants and funding as a barrier.
- 25% mentioned general economic issues.
- 17% reported difficulties in recruiting suitably qualified staff.
- 10% indicated low productivity as a concern.

Business Support and Funding:

- Around 10% of respondents confirmed that they had received business support in the past year.
- There is interest in specialist business support, specifically 38% expressed interest in grant search and bid writing assistance and 15% indicated a need for marketing support. 30% expressed interest in assistance in creating partnership opportunities.
- 40% have applied for public grant funding in the last 5 years; 30% of those who applied were successful.

Infrastructure and Workspace

The survey evaluates the current infrastructure supporting marine industry growth across a range of key factors. The majority of respondents rated the infrastructure as either poor or adequate; with many unsure. 10% of respondents said they felt it was excellent.

Less than 50% indicated that they had access to size and quality workspace; good IT connectivity; and appropriate transport infrastructure.

Investment in Marine Technology and Innovation

20% of respondents indicated investment is already taking place; 33% have no investments planned or require more. Autonomous vessels, offshore renewable energy and smart port systems were seen as key opportunities with fishing vessel data collection, port-specific advancements, and better infrastructure for small to medium-sized businesses seen as impactful for marine industry growth.

Workforce and Recruitment:

- 20% reported an increase in workforce, 18% indicated a constant workforce and 15% noted a decrease, with 20% forecasting a further decrease.
- More than 50% of business respondents indicated challenges in recruiting suitable staff, with some businesses seeking trainees, youth for fishing, and volunteers.
- 29 % indicated a need for wage subsidy schemes and advertising support.
- There is interest in apprenticeships, but only a small number of respondents currently employ apprentices. 20% of respondents were interested in further discussions about apprenticeships.
- There are concerns about insufficient local training and educational support for workforce needs in the marine industry.

Sustainability Challenges and Support Needs:

- Pollution, climate change and habitat destruction were cited by more than 70% of respondents as a major challenge, with the lack of agency in fisheries management, pollution issues, sewage overflow, excessive red tape, and lack of insulated workshop infrastructure seen as the causes.
- Businesses express a need for support to improve environmental sustainability with energy efficiency improvements and reduction in single-use plastics are seen as examples of solutions to these challenges.

Future Evolution of the Marine Industry:

30% anticipate significant growth and innovation and 26% expect steady growth with challenges.

Overall, the survey highlights a mix of optimism and barriers regarding growth, workforce challenges, sustainability, and the need for better support and infrastructure in Cornwall's marine sector.

Statistical Validity of the Results

43 responses represent 12% of CMN's membership, and over 5% of the total marine sector business base. The results therefore provide a very helpful insight into key employer issues, ambitions and challenges. The responses, when combined with the data review and the workshop consultation processes, ensure a high degree of statistical validity, giving confidence to how the sector actions and conclusions have been reached.

Appendix 3:
ROUNDTABLE EVENT

The roundtable meeting included representatives of leading marine businesses from across Cornwall.

The event included breakout workshops to consider the opportunities and challenges for specific marine sub-sectors.

Key findings are reflected within this Growth Plan.

The roundtable was hosted by CMN. It was attended by 20 marine business representatives including:

Cornwall Wildlife Trust;

Feritech Global;

University of Exeter;

Falmouth Harbour Commissioners;

SubConnected AB;

Cornwall Council;

Brand Innovation;

BG Renewables;

Cornwall Marine Network Ltd;

Solis Marine Engineering Ltd;

A&P Falmouth;

Penzance Dry Docks;

Isles of Scilly Steamship Group;

Innovate UK;

University of Plymouth.

Appendix 4: STRATEGIC CONTEXT

SUB-SECTOR	NATIONAL POLICY / STRATEGY (KEY)	MARINE PLANNING & REGULATION (KEY)	CONTEXT (CORE FOCUS & ALIGNMENT)	LOCAL PRIORITY	FUTURE GROWTH OPPORTUNITIES (TOP 2-3)
Ports, Harbours, and Marinas.	**Modern Industrial Strategy (2025), UK Net Zero Strategy (2021).**	**South West Marine Plan (INF1–INF2, CC1–CC2), Port Marine Safety Code; Shoreline Management Plan (2006-2012).**	Critical infrastructure for maritime trade, **Floating Offshore Wind** (FLOW) delivery, and vessel decarbonisation. National net-zero goals require significant port upgrades and a shift to low-carbon fuels.	**Port Upgrades for FLOW:** Prioritising investment in quays and infrastructure at key ports (Falmouth/ others) to service the Celtic Sea off-shore renewable industry. **Cornwall Good Growth Strategy (2025), Cornwall Maritime Strategy (2012-2030), Cornwall Local Transport Plan (2022-2030), Cornwall Climate Emergency Development Plan (2023); Cornwall Local Transport Plan (2022-2030) and Cornwall Climate Emergency Development Plan (2023).**	1. **FLOW Base Development:** Securing investment for quayside upgrades and heavy-lift capacity for FLOW maintenance/assembly. 2. **Alternative Fuel Bunkering:** Developing infrastructure for green fuels (e.g. Hydrogen, electric charging) for net-zero vessels.
Boatbuilding and Ship and Boat Repair.	**National Shipbuilding Strategy (2022), Clean Maritime Plan (2019).**	**South West Marine Plan (INF1–INF2, CC1–CC2).**	Alignment driven by the transition to a **net-zero fleet.** Regional FLOW investment creates major new demand for specialist vessel fabrication, repair, and green skills development.	**Vessel Decarbonisation:** Supporting the transition of the local fleet (fishing, service, leisure) to lower-emission technologies, aligning with the Cornwall FLOW Strategy. **Cornwall Maritime Strategy (2012 – 2030), Cornwall and Isles of Scilly Local Skills Improvement Plan (2024).**	1. **Offshore Wind Service Vessel Fleet:** Building and maintaining new high-specification, low-emission vessels for FLOW operations. 2. **Vessel Decarbonisation Retrofits:** Specialising in converting existing vessels to hybrid-electric or alternative fuel systems.
Marine Manufacturing and Engineering.	**Modern Industrial Strategy (2025), Maritime 2050 Strategy (2019).**	**South West Marine Plan (innovation/data provisions).**	Capitalises on the engineering demand created by the large-scale rollout of **Ocean Energy** (FLOW, Wave). Fosters supply chain readiness for foundation fabrication and subsea cabling.	**Supply Chain Readiness:** Developing local capacity and skills to meet the specialist engineering demands of emerging sectors like FLOW and marine autonomy. **Cornwall Good Growth Strategy (2025), Cornwall and Isles of Scilly Local Skills Improvement Plan (2024).**	1. **FLOW Supply Chain Integration:** Manufacturing high-specification components (anchors, mooring systems, dynamic cables) for Celtic Sea FLOW projects. 2. **Advanced Materials:** Developing expertise in composite materials and advanced manufacturing for lightweight marine applications.

SUB-SECTOR	NATIONAL POLICY / STRATEGY (KEY)	MARINE PLANNING & REGULATION (KEY)	CONTEXT (CORE FOCUS & ALIGNMENT)	LOCAL PRIORITY	FUTURE GROWTH OPPORTUNITIES (TOP 2-3)
Marine Leisure, Tourism and Health.	**UK Tourism Recovery Plan (2021), DEFRA Blue Health.**	**South West Marine Plan (REC policies).**	Sustaining a high-value coastal economy by marketing marine leisure and **Blue Health** links. Activities must co-exist sustainably with conservation and industry.	**Blue Health & Wellbeing Promotion:** Positioning marine and coastal environments as assets for public health, linking the tourism offering to wellbeing outcomes. **Cornwall Good Growth Strategy (2025), AONB Management Plan (2022-2027), Cornwall and Isles of Scilly Health and Wellbeing Board Strategy (2023).**	1. **Blue Health Tourism:** Developing high-value, niche tourism products focused on wellbeing and nature connection. 2. **Sustainable Coastal Access:** Investing in low-impact infrastructure (eco-friendly marinas, electric boat hire) to align with Marine Plan policies.
Marine Technology, Data and Autonomy.	**Maritime 2050 Strategy (2019), Modern Industrial Strategy (2025).**	**South West Marine Plan (innovation/data provisions).**	High-growth specialisation that supports the core maritime sector by improving survey efficiency, safety, and digitalising operations. Aligns with the push for autonomous systems.	**Digital and Marine Tech Specialisation:** Identifying digital and marine technology as a key sector for regional economic growth and investment. **Cornwall Good Growth Strategy (2025), Cornwall Maritime Strategy (2012-2030), Cornwall and Isles of Scilly Local Skills Improvement Plan (2024).**	1. **Offshore Asset Monitoring:** Providing autonomous survey and inspection services for growing FLOW and fixed offshore wind farm assets. 2. **Digital Twin Development:** Creating digital models of ports and coastal zones for real-time risk assessment and planning.
Marine and Offshore Resources.	**British Energy Security Strategy (2022), UK Net Zero Strategy (2021); UK Modern Industrial Strategy 202; Clean Energy Industries Sector Plan (Policy paper June 2025).**	**South West Marine Plan (EN1–EN4), Crown Estate Leasing Rounds.**	Directly aligned with national goals for **Net Zero** and **Energy Security** by scaling non-fossil fuel electricity generation. Cornwall's FLOW Strategy is a direct response to UK energy targets.	**Net Zero by 2030 and FLOW Leadership:** Placing ocean energy (especially Celtic Sea FLOW) at the core of the local response to the Climate Emergency and economic growth. **Cornwall Good Growth Strategy (2025), Cornwall Maritime Strategy (2012 – 2030), Cornwall Climate Emergency Development Plan (2023).**	1. **First-Mover Advantage** in FLOW: Securing early-stage investment for deep-water port infrastructure and supply chain establishment. 2. **Wave and Tidal Commercialisation:** Developing commercially viable wave and tidal energy technologies.

SUB-SECTOR	NATIONAL POLICY / STRATEGY (KEY)	MARINE PLANNING & REGULATION (KEY)	CONTEXT (CORE FOCUS & ALIGNMENT)	LOCAL PRIORITY	FUTURE GROWTH OPPORTUNITIES (TOP 2-3)
Fisheries and Aquaculture.	**Seafood 2040 Strategy, UK Marine Strategy, Fisheries Act 2020, UK Joint Fisheries Framework, Cornwall Fishing Strategy 2022, DEFRA Food Strategy (2025).**	**Cornwall IFCA Byelaws, Joint Fisheries Statement 2022, Marine Strategy Regulations 2010, DEFRA Food strategy 2025.**	Directly aligns with the 4 key strategic pillars of the Cornish Fishing Strategy 2022: **Science & Sustainability:** Ensuring the sector develops relevant environmental and social science to evidence and inform fisheries and ocean management. **Enhancing routes to market** and promoting seafood/ strengthening exports **Career retention/skills** **Port/Harbour infrastructure** .	**Local Action & Diversification:** Launch and growth of Cornwall Fisheries Science Board Promotion of Cornish Seafood to grow market opportunities. Developing on and offshore careers – Young Fishermen Network Enhancing career offer from Seafood Cornwall Training **Cornwall Good Growth Strategy (2025), Cornwall and Isles of Scilly Agri-Food Strategy Action Plan (2025), True Value of Seafood to Cornwall report (2024).**	**Grow seafood market** both domestically and export led. **Improve and innovate equipment and tech to ensure modern and safe places of work.** **Develop multiple workstreams to recruit and retain crew** in the catch sector. **Enhance the training provision** from Seafood Cornwall Training using new training building facility in Newlyn **Sustainable Aquaculture:** Scaling up high-value, low-impact aquaculture (e.g., shellfish, seaweed farming).
Marine Conservation and Biodiversity.	**Environment Act (2021), 25-Year Environment Plan (2018), National Flood and Coastal Erosion Risk Management Strategy for England (2022).**	**South West Marine Plan (BIO policies), Marine Protected Areas Network, CIOS Marine Nature Recovery Framework 2025.**	Requires all marine activity to comply with stringent biodiversity policies. Focus is on environmental restoration, monitoring, and protecting the **Marine Protected Areas Network.**	**Strong Local Stewardship:** Marine and Coastal Partnership, Local Nature Partnership, Delivering local projects (e.g., Marine Strandings Network) and the overarching Cornwall Biodiversity Strategy to safeguard marine assets. **Cornwall Local Nature Recovery Strategy (2025), Marine Nature Recovery Strategy (2025), Cornwall and Isles of Scilly Environmental Growth Strategy (2023), Cornwall Catchment Partnership Strategy (2025), Cornwall Flood Risk Management Strategy (CLFRMS) (2020), SW River Basin Management Plan (SWRBMP) (2022-2027), SW Flood Risk Management Plan (SWFRMP) (2021-2027).**	1. **Nature-Based Solutions (NBS):** Implementing coastal protection projects (i.e. restoring saltmarsh/ seagrass beds) for flood defence and carbon sequestration. 2. **Ecosystem Services Market:** Developing commercial services around biodiversity net gain (BNG) and environmental monitoring for large-scale developments.

CORNWALL'S MARINE FUTURE

Cornwall Marine Sector Growth Plan

2026-2031

CORNWALL marine NETWORK

University of Exeter