

Ports & Maritime:

**Key to driving economic
growth, creating jobs
and powering energy
transition.**



Contents

| | |
|---|----|
| Welcome | 4 |
| Quality and skilled jobs | 6 |
| Community impact: The Port of Liverpool and Sefton | 8 |
| How cargo flows directly impact regional economies and sustainability | 10 |
| It's time to cut road miles. Let's get goods in closer, by sea. | 12 |
| A brand new route for trade & retail | 14 |
| Hunterston PARC | 16 |
| Peel Port Group's Energy Transition Hubs | 20 |
| Ports – magnets for regional investment | 22 |
| Realising the potential of UK Ports | 24 |
| Our own net zero journey | 26 |

Welcome

The ports and maritime sectors play a crucial role in advancing key government priorities and supporting its missions aimed at driving progress for the UK.

As engines for economic prosperity across the regions, ports and the wider maritime sector provide the government with a significant number of opportunities to deliver on its important missions of kick starting economic growth, making Britain a clean energy superpower and break down barriers to opportunity.

Ports have historically played a fundamental role in Britain's success; helping to feed, build and power the nation. And now, with a new government in place and a fresh set of ambitious missions for the country, ports are uniquely positioned to showcase their value and potential as a key sector that supports the growth and prosperity of many other UK industries.

We stand ready to play our part in supporting projects that support sustainable growth for trade, creating jobs and advancing a greener energy future for all.



Claudio Veritiero

Chief Executive Officer, Peel Ports Group

Ports

- **Act as catalysts for growth and economic development.**
- **Connect multiple social, economic and geographical sectors.**
- **Support manufacturing, processing, retail, resource extraction, heavy industry and much more.**
- **Create fair employment and fair opportunities.**

With cutting-edge technology, high-quality design and manufacturing, unparalleled expertise in services and major investment opportunities, the UK is the natural home for global maritime business.

Maritime is a vital part of our island nation's heritage and of our modern economy – supporting jobs, driving innovation and enabling trade.

£2.67

GVA created in UK economy for every £1 contributed directly by port sector.

51%

How much more productive the UK maritime workforce is compared to the average UK worker.

£37bn

Turnover from maritime sector £10.8bn GVA from maritime sector.

800,000

Jobs supported by maritime sector.

£10,500

Additional personal income by maritime sector compared to national average.

£500m

Collective annual investment by ports each year.

95%

UK global trade (by volume) facilitated by maritime sector.

450m

Tonnes, UK global trade facilitated by maritime sector.

£500bn

UK global trade facilitated by maritime sector.

£29bn

GVA from port sector.

£74bn

Aggregate economic impacts from ports industry.

£1.8bn

Tax revenues from port sector.

Quality and skilled jobs

Modern ports provide a wide range of skilled career opportunities. Our continued evolution beyond traditional manual roles provides opportunities for on-the-job learning and continuous development, from apprenticeships to life-long professional pathways.

Apprenticeship with real value



Jade Creighton

Mersey

After achieving her A levels, Jade joined Peel Ports as an Electrical Apprentice, studying at North West Training Council. Jade has now been with Peel Ports as an Electrical Engineer for nearly two years.

"My career in the maritime sector has changed my life. It's allowed me to see things that people don't see every day as well as meet good people and expand my knowledge and experience. Peel Ports have supported my career development by allowing me to do on the job training and on the job learning, allowing me one day a week to go to college to further my education."



Scott Duncan

Clydeport

Scott Duncan is an apprentice electrician at Peel Ports' Clydeport. A typical week for Scott at the port can consist of many different jobs, from maintaining cranes to carrying out installation work. Scott's ambition is to build a long-term career with Peel Ports, progressing his skills and ultimately taking on his own apprentice.

Peel Ports Group employs around 2,000 people across the regions where it operates, and, in Liverpool, 80% of employees live locally, and they earn c25% more than the local average salary.



Technicians



Crane operators



Pilots



Port police and security



IT analysts



Automation engineering



Marine navigation



Business management



Sales and commercial



Marine Biologist



HGV and drivers



Legal and financial



Planning and property management



Health, safety and environment

Community impact: The Port of Liverpool and Sefton

The story of one community and how it benefits from a thriving port.

No.1

By turnover, Peel Ports is the largest company registered in the borough

33%

of the Port of Liverpool workforce live within the Borough of Sefton

80%

of the workforce live in the Liverpool City Region

37

apprentices at the port live within the borough

£750m+

in total investments, helping bring new jobs and business opportunities to the area



CARGO FLOW & THE ECONOMY

How cargo flows directly impact regional economies and sustainability

The new government aims to address economic and social imbalances, which are also reflected in the unequal distribution of freight across the UK. A bias towards the South East has led to high costs and stifled productivity, coupled with capacity in other parts of the country being underutilised.

A nationwide approach to transporting goods would create more efficient supply chains, benefit overheated areas, and provide jobs and opportunities in other regions. There have been previous efforts focused on relieving congestion at bottlenecks, but a broader strategy using regional ports would offer a more sustainable and greener supply chain. Peel Ports' geographical coverage could support this nationwide approach to deliver on government ambitions.



A holistic view of freight Transport – Sea, Rail and Road

It's time to look at end-to-end transport as one integrated system to enable smarter and more sustainable infrastructure investment.

Under previous governments, public spending on road and rail transport projects has been centred on the southeast and based on outdated models. The private sector has also missed opportunities to explore integrated supply chain solutions that could create efficiencies throughout the entire cargo journey – from manufacturer to consumer.

At Peel Ports Group, we are ready to work with the new government to explore opportunities for a strategic and equitable investment programme across the country. A considered and purposeful programme could increase direct vessel calls to regional ports, enhancing capacity, resilience and sustainability to support the UK's long-term economic goals.



CARGO FLOW & THE ECONOMY

It's time to cut road miles. Let's get goods in closer, by sea.

Port traffic analysis highlights the need for improved transport connectivity in local regions through better efficiency of freight movement. The use of regional ports rather than southern hubs shortens cargo journeys, which reduces travel time and congestion.

This provides efficiency at every level and contributes to net zero goals.

70% of port throughput relies on road haulage, which needs significant investment to reduce congestion and HGV hours. While road transport will remain an essential element of the mix, there are significant growth opportunities in rail freight and coastal shipping, which can further reduce road traffic and emissions.

For example, using the Port of Liverpool for container traffic in the North West, saves around 200 miles per journey, compared to southern ports. Benefits analysis of modal shift from road to rail of containers between Liverpool and Scotland/Midlands

Cut carbon, choose closer

Move smarter from Liverpool for lower emissions.



| | Road miles | Rail miles | Road kg CO2 | Rail kg CO2 |
|----------------------------|------------|------------|---------------|--------------|
| Liverpool - Trafford Park | 37 | | 58.81 | |
| Felixstowe - Trafford Park | 250 | 260 | 397.38 | 36.10 |
| Liverpool - EMG* | 105 | 110 | 166.90 | 57.58 |
| Felixstowe - EMG* | 165 | 150 | 262.27 | 78.52 |

* EMG - East Midland Gateway





CARGO FLOW & THE ECONOMY

A brand new route for trade & retail

MSC's new Britannia Service creates a unique direct container service between the North West and the Far East and significantly opens up export and import opportunities for businesses looking to utilise the Port of Liverpool's proximity to the heart of the UK.

The service follows an increased demand from retailers and importers looking to diversify their supply chain, improve resilience and reduce total road miles by ensuring goods arrive closer to their end destination.

The first sailing for the service saw the MSC Tokyo arrive in Liverpool from Vietnam, after leaving China.

Michael Collins, Commercial Director at MSC UK commented,

"We are delighted to see the arrival of this highly anticipated direct service connecting Asia with Liverpool which will significantly enhance our customer offering in the UK, while reaffirming our partnership with Peel Ports Group."

Building on our extensive UK port network and established services between the Far East and UK, the Britannia Service allows customers in the North-West of the UK to bring their cargo closer to its final destination."

ENERGY TRANSITION

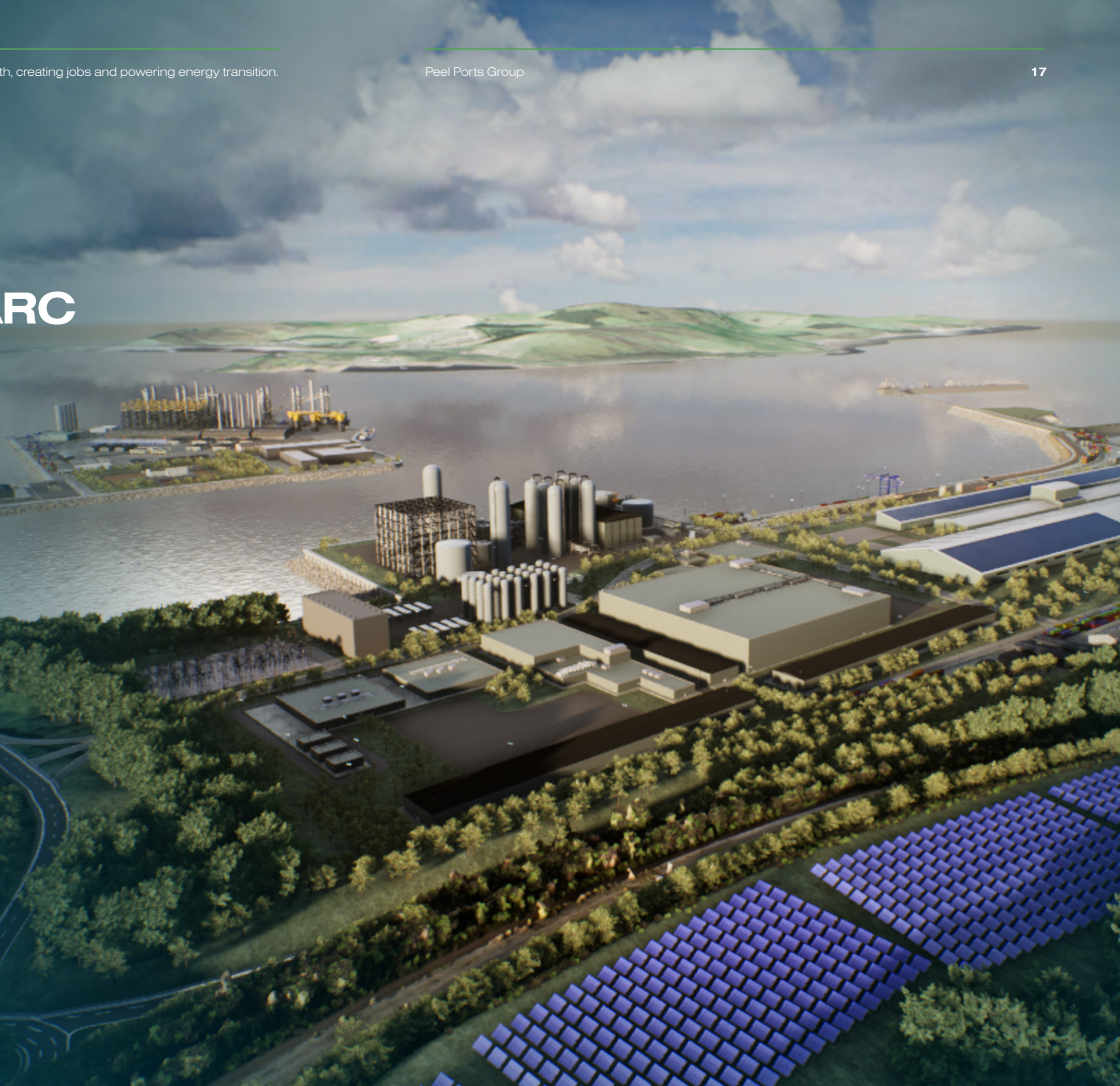


Hunterston PARC

Scotland's Energy Revolution

A once in a lifetime opportunity to boost the UK's energy transition efforts.

As a key player in the blue and green economies, Hunterston PARC is on the verge of revolutionising the UK's energy landscape. This former coal-handling port in North Ayrshire is transforming into a cutting-edge hub for offshore wind component manufacturing, poised to create thousands of jobs, drive sustainable investment and drive innovation.



ENERGY TRANSITION



The potential cornerstone for Great British Energy

Hunterston PARC can deliver against the principles of GB Energy. It can boost Britain's energy security by fast-tracking offshore wind developments and deliver cheaper energy bills for families and businesses across the UK.

As one of the UK's first offshore wind base component manufacturing site for the construction of key elements such as foundation structures, jackets, turbine assembly, HVDC cable manufacturing and other associated activities, it will create thousands of new quality jobs, here in Britain, and support the development of UK supply chains across a variety of sectors.

Hunterston's partners can deliver a major hub for innovation and new technology which can be grown at scale, with the potential to benefit wider industry sectors and local communities for generations to come.

Multi £bn inward investment

With over 90% of the site now under option, Hunterston has lined up an impressive c£3bn worth of inward investment through a range of partners and tenants who are committed to delivering on a unified vision: establishing a nationally recognised energy and marine campus. This will bring together leading industry operators and world-class innovation, boosting Britain's energy security and solidifying its global profile as a leader in offshore wind development.

Thousands of skilled and sustainable jobs

The transformation of Hunterston PARC into a major energy and marine hub will drive the creation of c5,000 green, skilled, and sustainable jobs. By establishing a manufacturing base for offshore wind components and other related industries, it is attracting top industry players, which will fuel innovation, workforce development, and long-term economic growth for the UK's green economy.

Innovation and technology with legacy

Hunterston PARC has the potential to accelerate home-grown offshore wind and green energy manufacturing to deliver cutting-edge innovation and technology by fostering collaboration among industry leaders and top-tier research institutions. By driving advancements in offshore wind and marine technologies, it is set to create new industry standards, delivering a lasting legacy of technological excellence, and position the UK at the forefront of the global green economy.

Energy security

The opportunity of creating a new base for offshore wind manufacturing in the UK will enhance energy security by reducing reliance on imported energy and boosting domestic production capacity. By establishing a robust supply chain and creating a self-sufficient energy infrastructure, the UK can ensure a stable, reliable, and renewable energy source that strengthens national resilience against global market fluctuations.



ENERGY TRANSITION

Peel Port Group's Energy Transition Hubs



Great Yarmouth

Great Yarmouth is at the centre of the world's largest market for offshore wind, with significant, ongoing growth potential.

The sector is set to meet the rising demand for cleaner energy, offering high-value growth and employment opportunities.

The Great Yarmouth and Lowestoft Enterprise Zone supports the clusters of energy businesses and aims to create 18,500 new, highly skilled jobs over the next 25 years.

The team and the port have extensive offshore wind experience in operations, maintenance, construction and installation of wind farms such as Dudgeon, Galloper and East Anglia ONE.

The Port of Great Yarmouth is a strategic hub for the offshore wind sector. Significant investment has been made with land available for further expansion.



King George V (KGV)

Situated on the River Clyde, KGV benefits from the Clyde's rich maritime history and local engineering expertise while providing vessel access to the centre of Glasgow. The dock can accommodate offshore wind operations, maintenance, construction and installation.

With a track record of supporting onshore wind through the import turbine components, the site is well equipped for both onshore and offshore wind.



Hunterston

Earmarked as one of the UK's key investment sites for the development of the blue and green economy, Hunterston PARC offers unrivalled opportunities for the energy transition market.

Situated on the Firth of Clyde, Hunterston PARC has access to some of the deepest waters of any port in the UK and 300 acres of usable land.

With an extensive redevelopment pipeline now in place, Hunterston could easily become a global centre for offshore wind turbine fabrication and assembly.





PORTS & INVESTMENT

Ports – magnets for regional investment

Many companies collaborate independently of the public sector to invest in facilities, creating jobs and business growth.

A supportive regulatory environment is essential for these plans to succeed, showcasing potential benefits to communities nationwide.

- Glasgow's King George V terminal has expanded the deep-sea dock for the metal recycling site at KGV alongside EMR and McLaughlin & Harvey, worth £10m.
- In Great Yarmouth, Peel Ports and ScottishPower Renewables jointly invested £5m in facilities to support East Anglia ONE offshore windfarm at Great Yarmouth - ScottishPower Renewables.
- London Medway hosts a £500k treatment facility on the former Thamesteel site for forest products for Rowlinson Timber.
- Cargill has completed a significant extension to the company's crush plant in Seaforth, a multi-million-pound project.
- MSC is one of the largest shipping lines in the world. MSC and Peel Ports Group have agreed to jointly invest millions of pounds in creating a new container and trailer depot in the heart of the Port of Liverpool. MSC has also launched a regular train service moving containers from the Port of Liverpool to the East Midlands.
- Jenkins and PPG spent more than £19m to create new facilities at the Port of Liverpool. The facilities enable around 20,000 containers to be de-vanned and returned to the container terminal without ever having to leave the boundary of the port.
- Shipping line ACL signed a 15-year contract extension in Liverpool, and Peel Ports Group is installing two new ship-to-shore cranes to handle the additional volumes over the contract's life.
- Stena Line operates daily ferry services between Birkenhead and Belfast. Stena Line and Peel Ports Group spent more than £17m to upgrade the linkspan at Birkenhead to enable more capacity to be deployed on these services.
- Working with third parties engaged with providing lower carbon construction materials, Ecocem, Stema and Hercules, will potentially present a £40 million investment opportunity into infrastructure projects.

WHERE NEXT?

Realising the potential of UK Ports

At Peel Ports Group, we want to play our part in achieving outcomes that provide shared benefits. We have structured our priorities with the missions of government, in the areas where we believe will be most effective in delivering their ambitious plans.

Kickstarting economic growth

As a leading logistics business operating across road, rail, canal, and sea, we advocate for more ambitious transport infrastructure investments. While current government initiatives in freight and rail are a step in the right direction, additional investment is necessary to address historical imbalances, especially between passenger and freight transport and between the South and North of the UK.

We support the government's recognition of the importance of a strong planning system for expanding economic opportunities. UK ports are crucial international gateways, and their role was highlighted by the National Policy Statement for Ports. We back new infrastructure commitments. The enhanced 'permitted development rights' and cross-boundary strategic planning mechanisms have been positive steps, though further harmonisation across devolved administrations would improve consistency.

Despite significant attention on housing, we note the historical lack of focus on coastal communities and the absence of a clear strategy for these areas. We urge increased investment in affordable housing to retain workers in coastal regions. While there is a new economic management approach, the maritime sector's potential is not fully acknowledged. Peel Ports is eager to work with the Government to enhance funding, boost productivity, and stimulate private sector investment, aiming to foster innovation and job creation through stronger public-private partnerships.

Making Britain a clean energy superpower

The port sector presents significant opportunities to reduce its carbon footprint and enhance productivity.

We welcome the commitment to improving resilience and accelerating the transition to net zero through robust partnerships with business and increased public investment. Key to this transition is the development of ship-to-shore power systems, which will enable docked vessels to utilize green electricity, significantly advancing our sustainability goals.

A stable tax regime is essential for businesses to plan effectively and create incentives for investment in carbon-reducing infrastructure. While Labour has yet to detail its taxation plans to support economic growth, we are eager to collaborate with the Government as it prepares for the budget. We aim to demonstrate how targeted fiscal measures can facilitate business planning and foster investment in green technologies.

Break down barriers to opportunity

Ports and the maritime sector play a crucial role in job creation and personal advancement.

We are committed to enhancing vocational education and training opportunities, recognizing the diverse talents and skills required in the modern logistics sector, including those related to 'green' jobs. We are prepared to collaborate with the Government to establish and agree upon performance measures for their missions, focusing on key business-related activities such as job creation, regeneration, and investment.

This partnership will be instrumental in understanding the private sector's impact on broader societal goals, including improved health and wellbeing.

LEADING THE WAY

Our own net zero journey

At Peel Ports Group, sustainability is at the heart of all we do. As one of the UK's largest port operators, and a major employer in the areas where we operate, we are fully aware of the role we need to play in driving a sustainable agenda.

On an environmental front, we've made an industry-leading commitment to become a net zero port operator by 2040, ten years ahead of UK government targets.

Since then, and just in the last three years, we have reduced our operational Scope 1 and 2 emissions by over 40%. Our approach and leadership in this area has been widely recognised by peers with a raft of industry awards and accolades.

NET ZERO
2040

ENABLING
THE FUTURE

2020

First use of electric vehicles in place across all our ports. Lighting across the ports is undergoing transition to LED, much of which also incorporate controls and sensors ensuring energy is only used when required.

2021

Peel Ports trialling use of electric power for plant machinery

2022

Diesel vehicles replaced with 100% electric and biodiesel

2025

Replacement to green electric use scheme which has an emissions factor of half the grid average

2030

67% reduction in fuel consumption

2035

Replacement of all gas usage and transition to electric or lower carbon fuel sources

2040

Net Zero Organisation

Group locations

Clydeport

Clydeport Head Office
16 Robertson Street
Glasgow
G2 8DS

Dublin

South Bank Quay Container Terminal
Pigeon House Road
Ringsend
Dublin 4

Great Yarmouth

Vanguard House,
S Beach Parade,
Great Yarmouth
NR30 3GY

Heysham

Port of Heysham Head Office
Heysham Port
Heysham
LA3 2XF

Liverpool

Port of Liverpool Head Office
Maritime Centre
Liverpool
L21 1LA

London Medway

London Medway Head Office
Archway House
Sheerness Dock
Sheerness
ME12 1RS

Manchester Ship Canal

Manchester
UK



