SWBC
south west business council

CONVENE
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May 18TH 2026

SWBC MAJOR PROJECTS CONFERENCE

Delivering in the South West

McMillan Theatre, Bridgwater

9:00 AM - 15:15 PM

May 18th 2026

THANK YOU TO OUR SPONSOR

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SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater



CLAIRE PEARCE

Chair, SWBC

&

Director, Real Growth Ltd

SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater

CLAIRE PEARCE

Delivering in the South West







SOUTH WEST BUSINESS COUNCIL MAJOR PROJECTS CONFERENCE

May 18th 2026

McMillan Theatre, Bridgwater

Delivering in the South West

Our Vision - To enable a thriving business community to drive sustainable growth and increased prosperity in the SW'.

Our Mission -To convene, inform, connect- to initiate action to unlock growth, shape solutions, drive delivery- creating opportunities for communities through jobs, homes, training and supply chains.













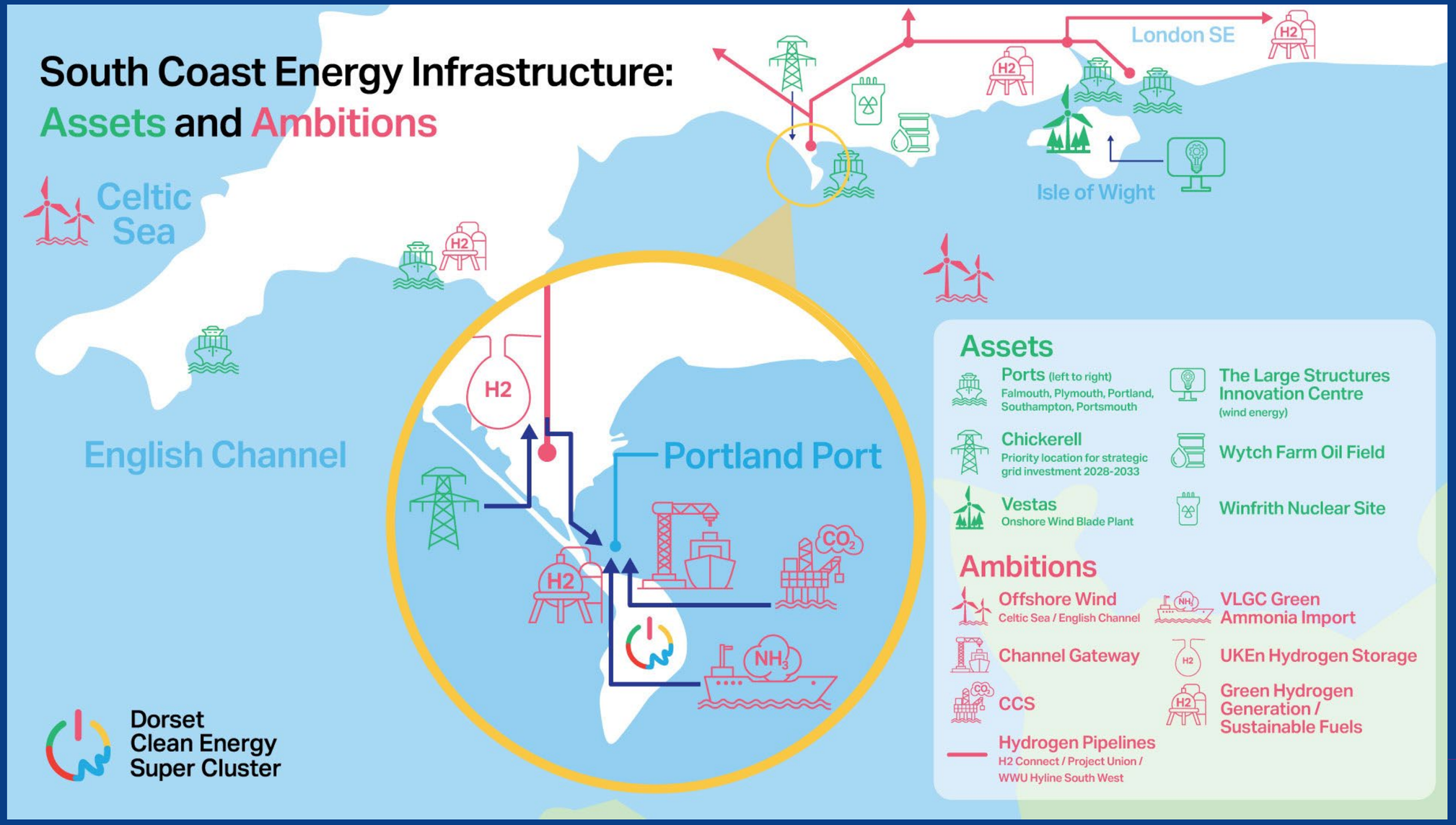
Championing the South West

May 18th 2026

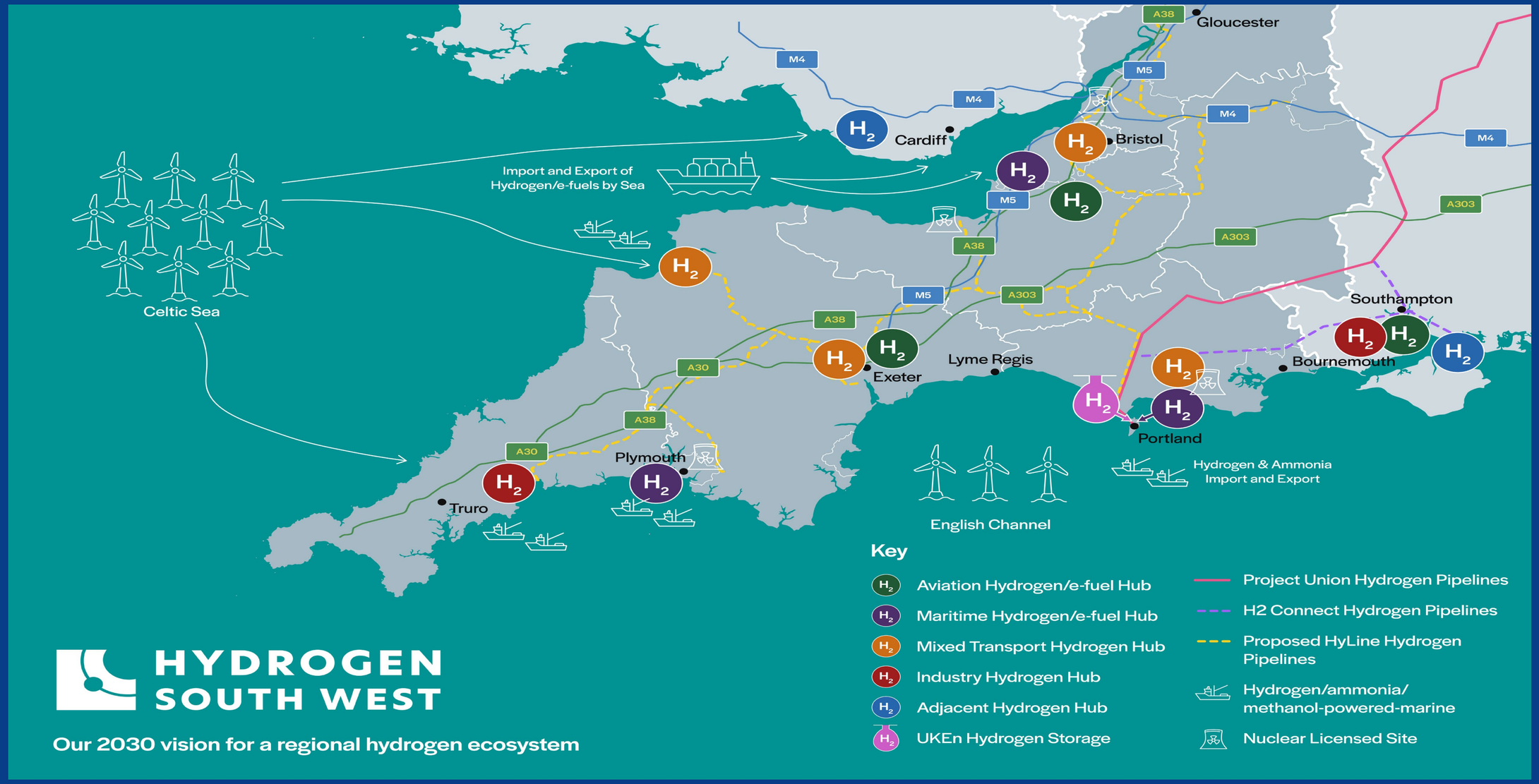
McMillan Theatre, Bridgwater

- Geopolitical instability, with politics leaning to the North the SW continues to deliver
- At the heart of UK resilience, security and growth
- The **largest of nine regions of England** (23,836 km^2) with approx. **6m residents**.
- Stretches from Cornwall -Gloucestershire to Swindon and BCP.
- World leading innovation clusters, at the **cutting edge of AI** internationally- UKHO and Met Office
- One of the most dynamic regional economies, **growth exceeding national average since 2008** Home to the NCC, Boeing, Airbus, Rolls Royce, Bristol Port, airport, BAE Systems, Leonardo, Honeywell, GLN
- Buzzing with innovation and tech, strong banking and investment sector
- The biggest construction project in Europe at **HPC** in Somerset, a new advanced manufacturing **gigafactory – power, electrification to decarbonisation**
- **Brabazon** near Filton, to Plymouth £4.4b defence deal
- Exciting prospects for supply chain growth - Altilium and new facilities such as Nautexe global- creating the World's Leading Extreme Environment Centre for Testing and Training
- Extensive opportunities in clean energy, defence, critical minerals from Celtic FLOW to
- **Dorset Clean Energy Super Cluster**, transition plan to look beyond Wytch Farm, and prospects for new nuclear
- A clear hydrogen vision for the SW through **Hydrogen SW**
- Investments in Grid, tidal surge barriers, reservoirs, solar, homes
- Supported by **10 universities,** additional colleges directly plugged into business needs and a wider range of schools and health care facilities- notably the **£87m Musgrove 'Kings**' surgical unit
- A **sporting giant** with top level teams and Olympians
- A **cultural hot house**
- Everyday economy ensuring logistics, professionals services, food security, **32 million visitors pa**.
- Underpinned by the highest quality national environment – **home to a third of UK farms and the Uks sole dairy producer, the best farm shop in the UK, and surely the best beaches**

Emerging Ambitions



Emerging Ambitions



HYDROGEN SOUTH WEST

Our 2030 vision for a regional hydrogen ecosystem

SOUTH WEST BUSINESS COUNCIL MAJOR PROJECTS CONFERENCE

May 18th 2026

McMillan Theatre, Bridgwater

Delivering in the South West

- Delighted with this showcase event to champion investment, share successes and boost economic confidence in SW
- Help build a stronger, coherent regional voice for business
- Proactive, progressive, positive narrative
- Action orientated
- Boost collaboration, foster solutions
- Address barriers
- Improve outcomes for communities
- Delivering the Industrial Strategy







SWBC south west business council

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May 18th 2026
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ANDY BERRY CBE

CEO, UCS College Group

Connecting Growth to Communities

- Sale at pace

UCS
COLLEGE GROUP
TRANSFORMING LIVES

Connecting Growth To Our Communities, Transforming Lives

UCS COLLEGE GROUP



UCS COLLEGE GROUP
TRANSFORMING LIVES

University Centre Somerset
DEGREES FOR REAL LIFE

BRIDGWATER COLLEGE
BRINGING OUT YOUR BEST

CANNINGTON COLLEGE
BRINGING OUT YOUR BEST

STRODE COLLEGE
BRINGING OUT YOUR BEST

TAUNTON COLLEGE
BRINGING OUT YOUR BEST

TRANSFORMING LIVES

TRANSFORMING LIVES AND COMMUNITIES THROUGH LEARNING AND PARTNERSHIPS

UCS COLLEGE GROUP

One of the largest College Groups in the UK

- 1,600 Staff
- 5,000 16-18 Students
- 10,000 Adult Students
- 1,200 Employer Partners
- £86m Turnover
- Largest FE College Apprenticeship provider
- National remit



Embedded in our communities

Delivering Inward investment

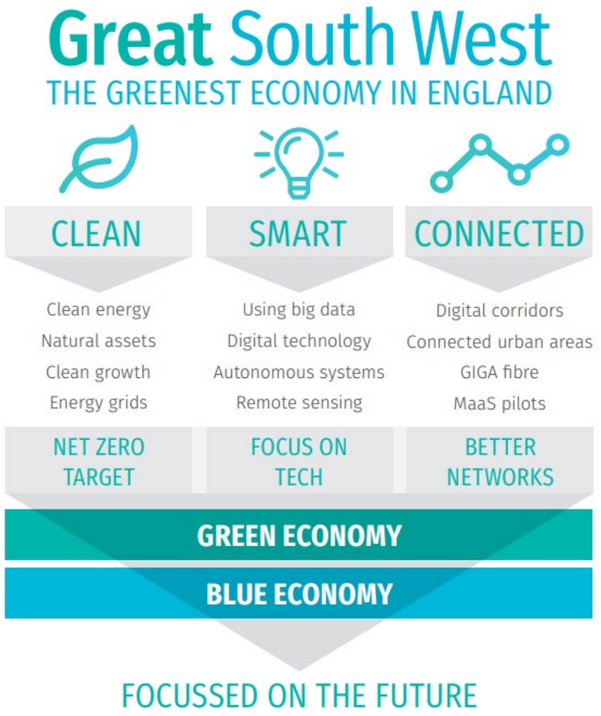
Transforming Lives

OUR SECTOR PRIORITIES: Delivering UK Industrial Strategy

Industrial Strategy Priority Sectors (IS8)

- Advanced manufacturing
- Clean Energy
- Creative Industries
- Defence
- Digital and Technologies
- Financial Services
- Life Sciences
- Professional and Business

Regional Priorities



UCS College Group Priority Sectors

- Advanced manufacturing - Agratas
- Clean Energy – Power Networks, HPC & Beyond
- Defence – Nuclear & Armed Forces
- Digital and Technologies – Apple & Agri-Tech
- Life Sciences – NHS Nursing & Allied Health Professions

SUPPORTING THE SOUTH WEST BUSINESS COMMUNITY

Track record of delivering creative and innovative solutions

- Embedding organisation's requirements
- Unlocking funding for infrastructure projects
- Harnessing international relationships
- Attracting & developing talent
- Delivering social mobility for UK

Department for Business & Trade

Department for Energy Security & Net Zero

Department for Education

UCS COLLEGE GROUP



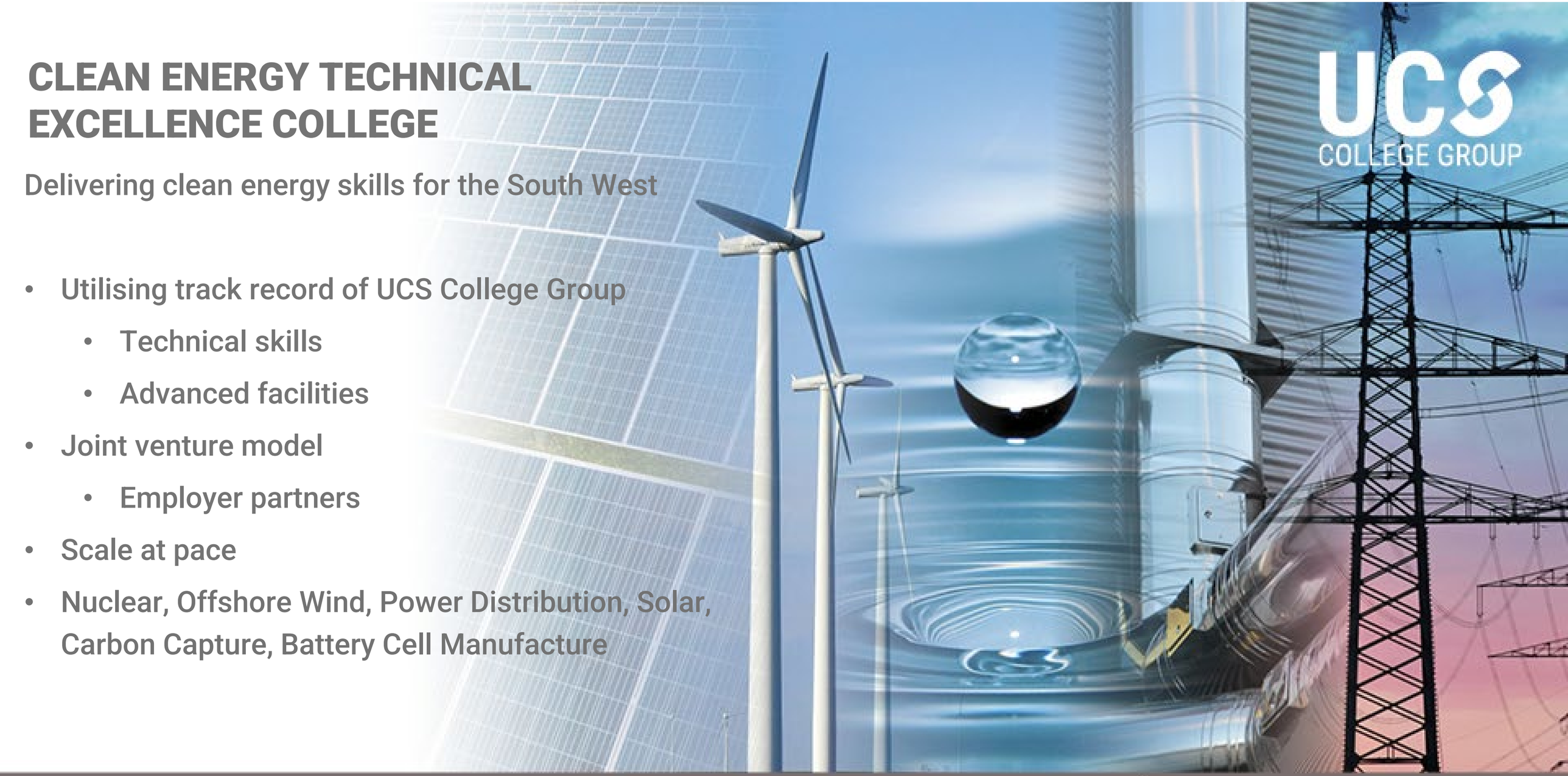


TRANSFORMING LIVES

CLEAN ENERGY TECHNICAL EXCELLENCE COLLEGE

Delivering clean energy skills for the South West

- Utilising track record of UCS College Group
  - Technical skills
  - Advanced facilities
- Joint venture model
  - Employer partners
- Scale at pace
- Nuclear, Offshore Wind, Power Distribution, Solar, Carbon Capture, Battery Cell Manufacture



UCS COLLEGE GROUP

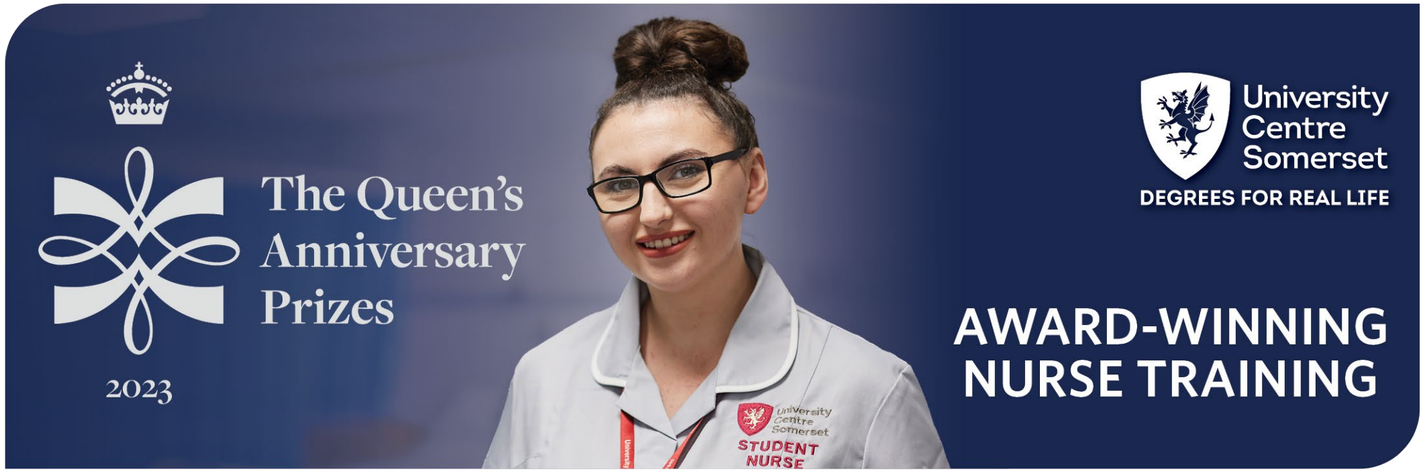
TRANSFORMING LIVES





UCS
COLLEGE GROUP









TRANSFORMING LIVES

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McMillan Theatre, Bridgwater



ANDREW COCKCROFT

Head of Stakeholder Relations & Social Impact, EDF (UK)

HINKLEY POINT C

BOOSTING ECONOMIC GROWTH AND CREATING A LONG-TERM LEGACY

18 MAY 2026

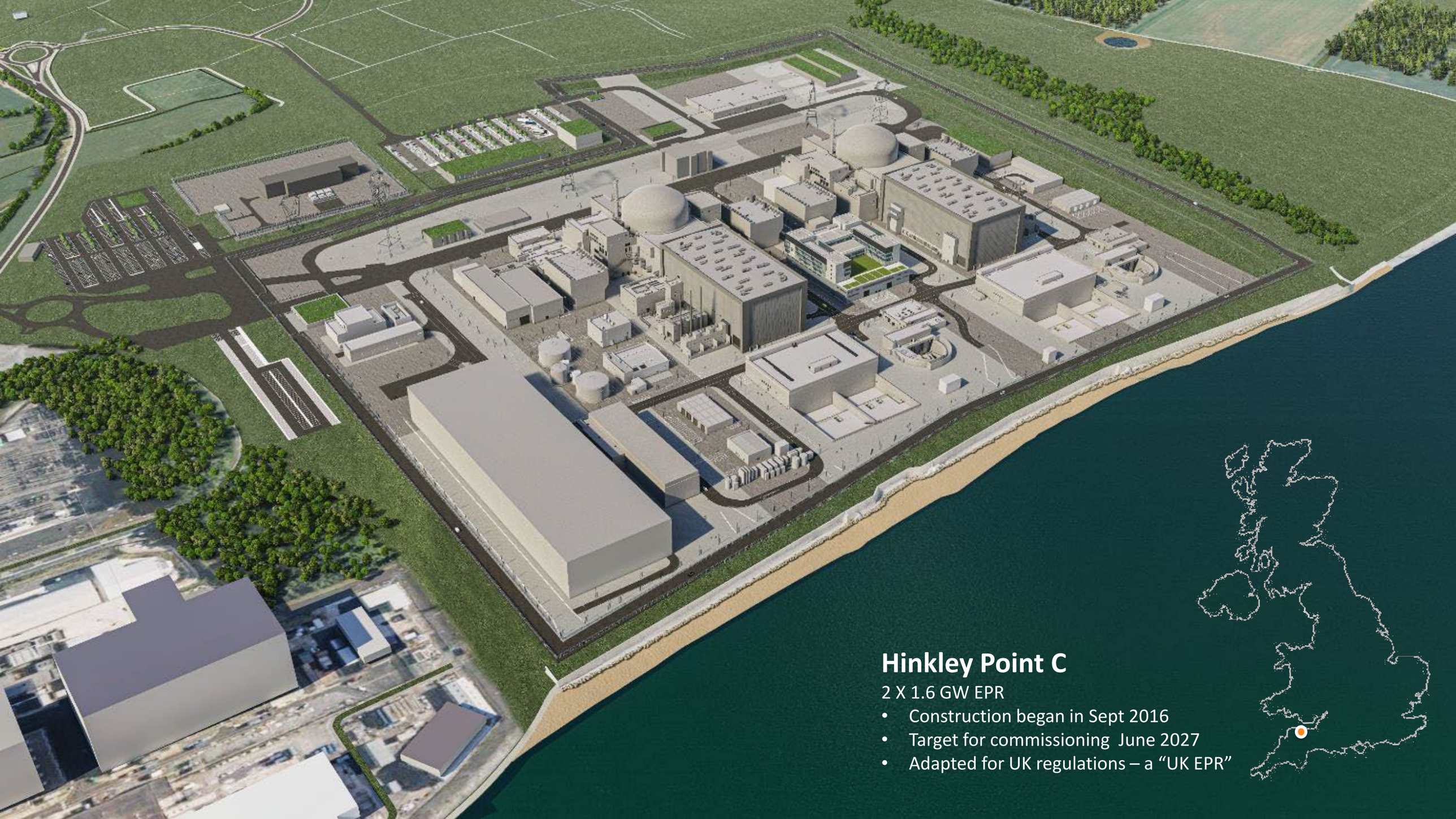
Andrew Cockcroft

Head of Stakeholder Relations and Social Impact

CHANGE IS IN *OUR POWER*



Workforce Uplift – Future s106 Summary | Project Construction | xxxxxxxxx; 001 | PROTECT PRIVATE | Copyright 2025 NNB Generation Company (HPC) Limited. All rights reserved. | Template Ref: 101543879; Revision: 001



Hinkley Point C

2 X 1.6 GW EPR

- Construction began in Sept 2016
- Target for commissioning June 2027
- Adapted for UK regulations – a “UK EPR”



SLT 03/09/20 | HPC Communications | NOT PROTECTIVELY MARKED © Copyright 2019 NNB Generation Company (HPC) Limited. All rights reserved. Template No: HPC-NNBGEN-XX-000-TEM-100130. Template Revision: 03

2026: A focus on mechanical and electrical

— 2026 —

- Install Reactor Pressure Vessel into Unit 2.
- Begin installing feedwater and pipe connections to Unit 1’s first Safeguard Building.
- Complete installation of de-mineralised water system in readiness for commissioning.

- Complete pre-stressing on Unit 1.
- Install first fuel handling crane into Unit 1.
- Energise Unit 1’s Auxiliary transformer.
- Complete cooling water system and fish return system tunnels.
- Install heat exchangers and additional systems into Unit 1 safeguard building
- Install low pressure casing into Unit 1 turbine hall.






366km of pipework
7,500 rooms
35,000 lights
387 pumps
MEH ALLIANCE
Building a Powerful Future
106,000 mechanical supports
35,666 valves
10,436km of cables
HinkleyPointC
EDF
CGN
Speedglas
3M

Supporting Britain's Industrial Strategy

- **The project has helped British businesses into the supply chain for over a decade and has focussed on maximising local benefit.**

- **64% of the value of the project going to British businesses** with **£5 billion already being spent with suppliers across with South West** region.

HinkleyPointC

EDF CGN

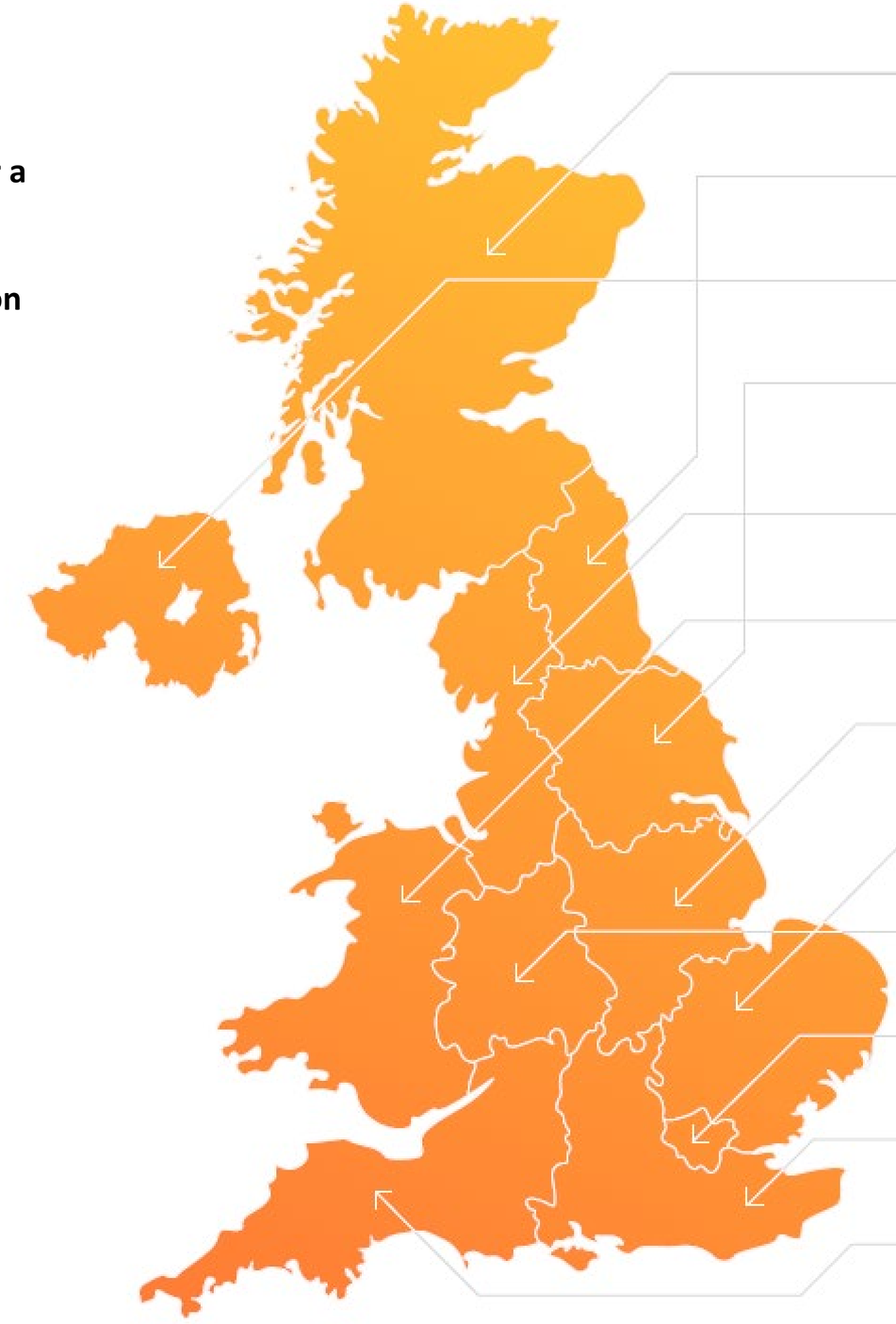
£13.3 billion
↗ into the British Economy in Gross Value Added

4,600
↗ British businesses within the supply chain

26,000
↗ direct and indirect jobs supported across Britain

64%
↗ of the value of Hinkley Point C is currently with British businesses

For every £1 spent by the project, a further £2.29 is generated in wider economic value within the South West



Scotland
171 businesses
£284 million spent

North East
94 businesses
£145 million spent

Northern Ireland
24 businesses
£14 million spent

Yorkshire and the Humber
260 businesses
£181 million spent

North West
435 businesses
£1.4 billion spent

Wales
190 businesses
£188 million spent

East Midlands
244 businesses
£309 million spent

East of England
310 businesses
£1.2 billion spent

West Midlands
330 businesses
£430 million spent

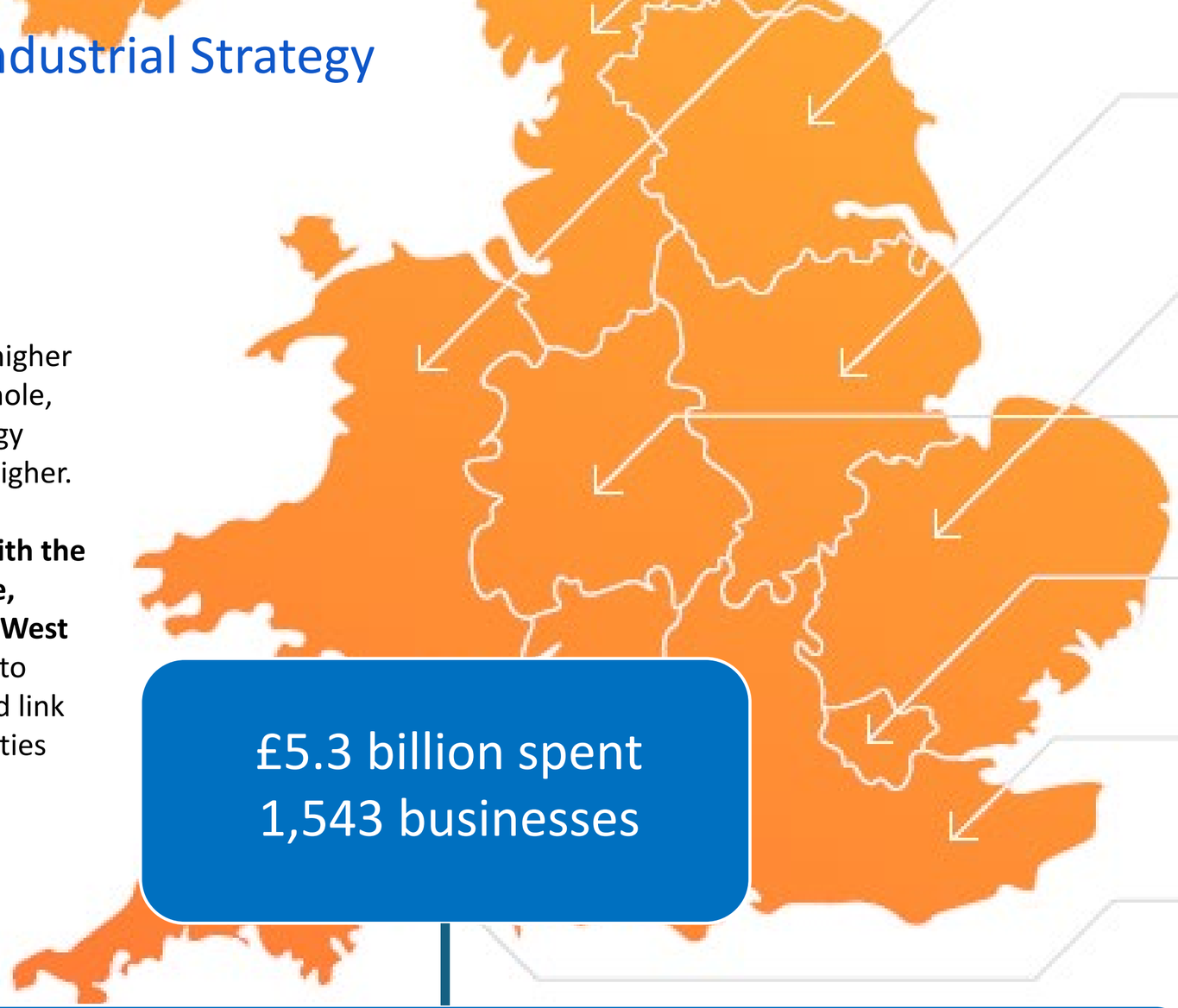
London
443 businesses
£1.5 billion spent

South East
560 businesses
£6 billion spent

South West
1,543 businesses
£5.3 billion spent

Supporting Britain’s Industrial Strategy

- Locally, employment in advanced manufacturing is over one-third higher than that seen in England as a whole, whilst employment in clean energy industries is almost three times higher.
- **The project continues to work with the Somerset Chamber of Commerce, Somerset Council and the South West Manufacturing Advisory Service** to encourage inward investment and link local businesses to the opportunities available



£188 million spent

East Midlands
244 businesses
£309 million spent

East of England
310 businesses
£1.2 billion spent

West Midlands
330 businesses
£430 million spent

London
443 businesses
£1.5 billion spent

South East
560 businesses
£6 billion spent

South West
1,543 businesses
£5.3 billion spent

£5.3 billion spent
1,543 businesses

- Local economic and productivity boost
- Efficiency and cost benefits

The Skills for Energy Security - Centres of Excellence

Welding Centre of Excellence

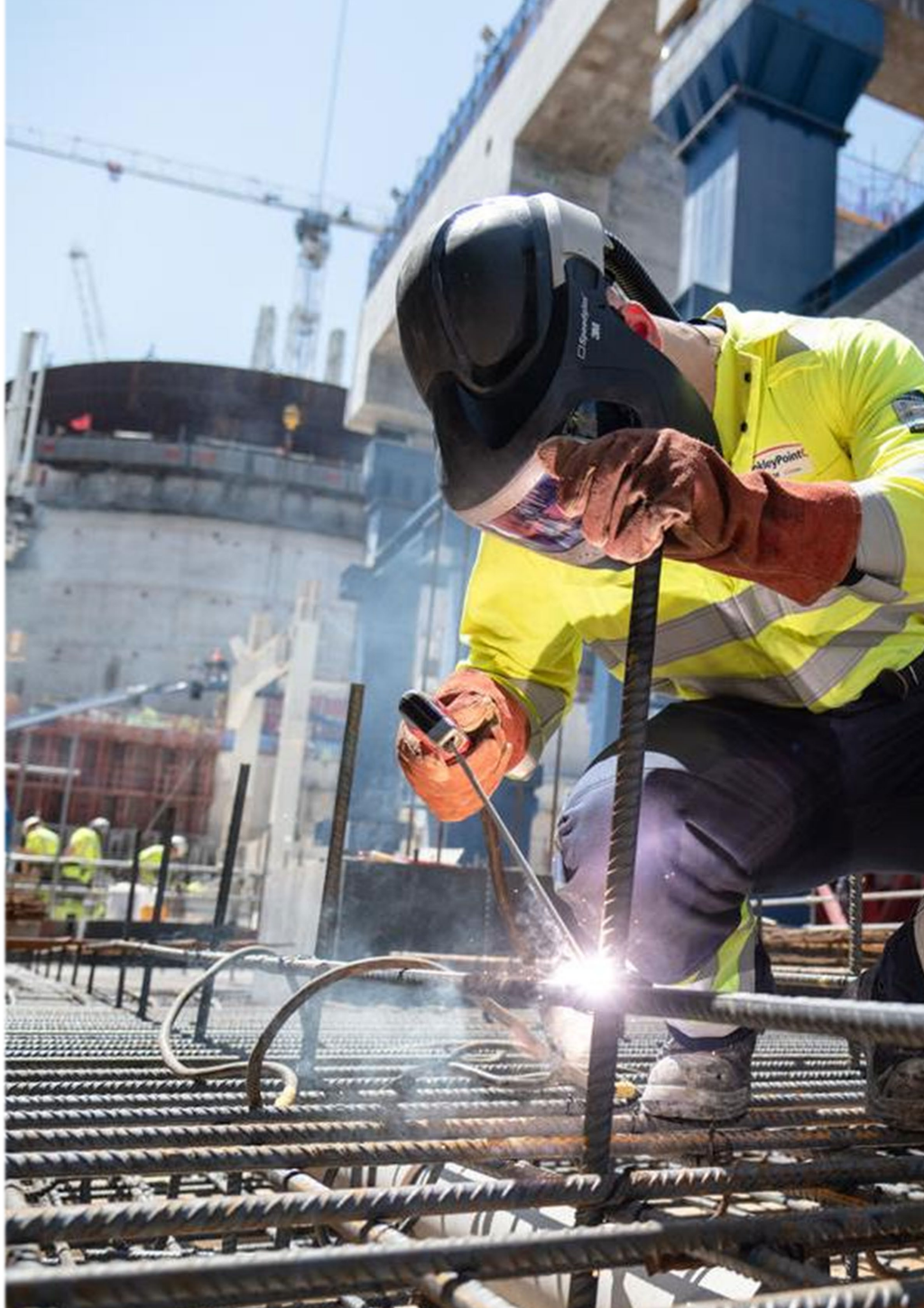
The Welding Centre of Excellence in Bridgwater provides comprehensive training for the many welders needed to complete the fit-out of Hinkley Point C.

Electrical Centre of Excellence

To ensure a skilled workforce for the mechanical and electrical fit-out phase of Hinkley Point C, the Electrical Centre of Excellence, situated in Bridgwater's Somerset Energy Innovation Centre.

Mechanical Centre of Excellence

The newest of the centres, the Mechanical Centre of Excellence in Cannington, is developing the mechanical engineering skills needed for the fit-out of the power station.



Apprenticeships

- The apprenticeship programme is exceeding expectations – surging past its initial 1,000 apprentice target to over 1,700 apprentices having been trained to date.

- Engagement with 80 schools in Somerset during 2024 and a relationship with local training providers has resulted in 70% of apprentices coming from across the South West .



70%

↗ of apprentices are from the South West

19%

↗ of apprentices are female

70

↗ different types of apprenticeship are available

↘ Case study

Stanley Taylor, 19
Minehead

Being one of the apprentices building Hinkley Point C gives you a great sense of achievement

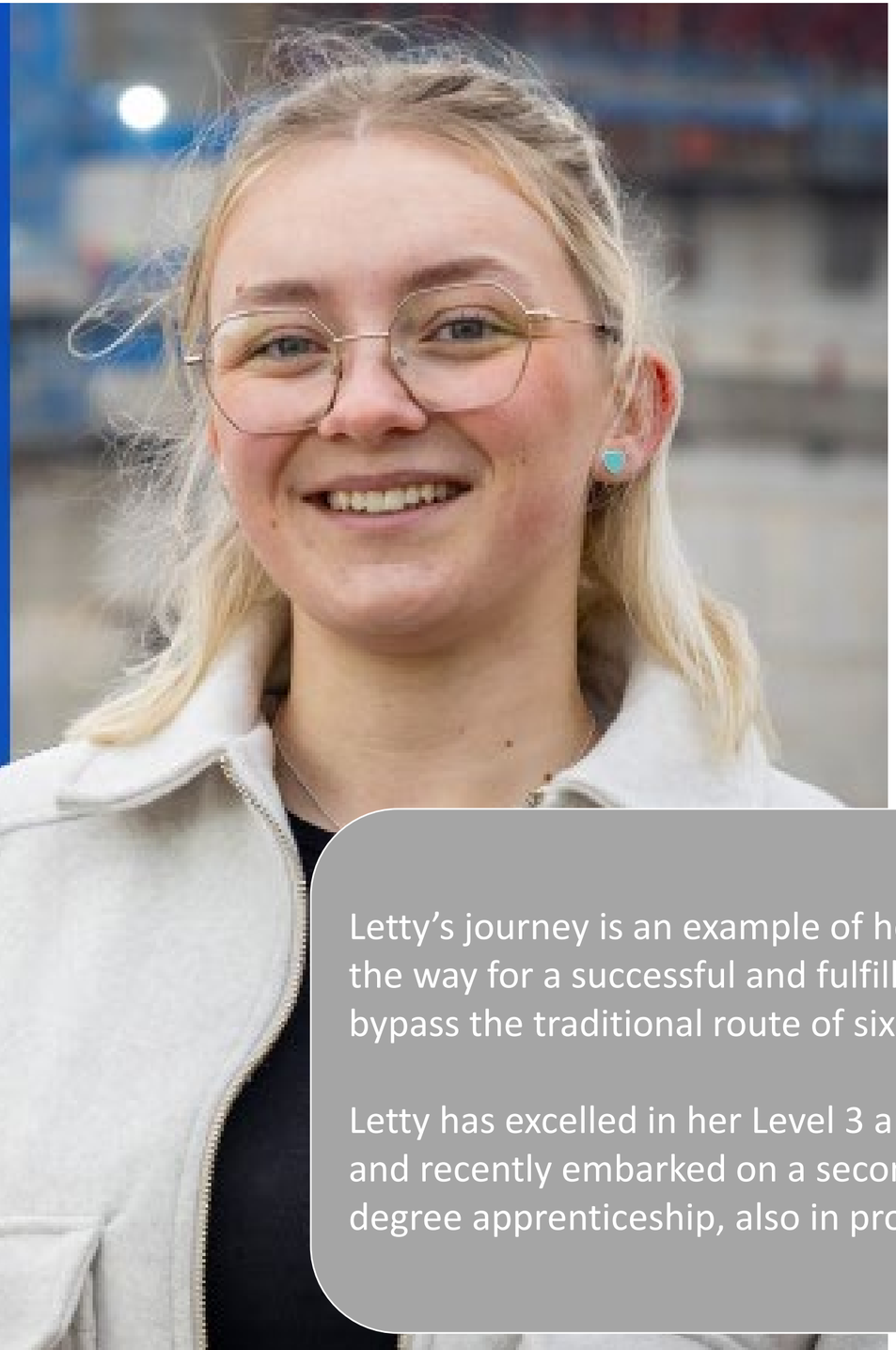


Stanley is in his third year of a four-year electrical apprenticeship with Balfour Beatty. He comes from a family with a strong tradition of working in trades.
Stanley was encouraged to pursue an apprenticeship by his family – especially his uncle, who also did an electrical apprenticeship. He sees it as a valuable opportunity for growth and development, allowing him to learn from
experienced electricians and earn qualifications.

Case study

Letty Smith, 19
Wedmore

I'm pretty much guaranteed a job at the end of my apprenticeship with endless possibilities

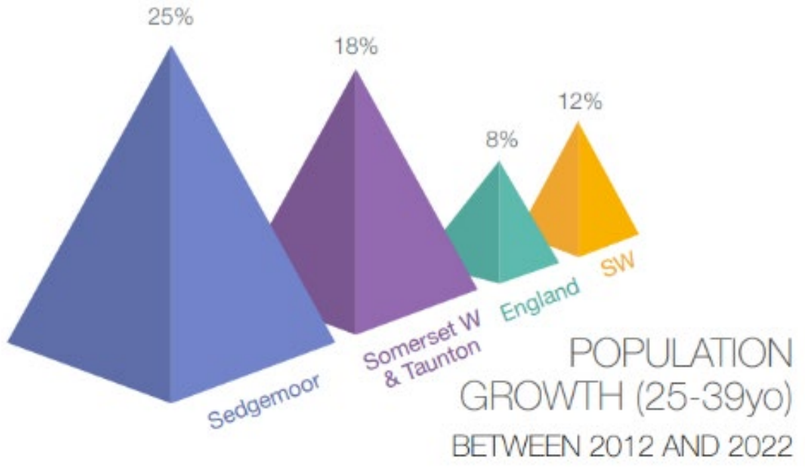


Letty's journey is an example of how apprenticeships can pave the way for a successful and fulfilling career. At 16, she chose to bypass the traditional route of sixth form and university.

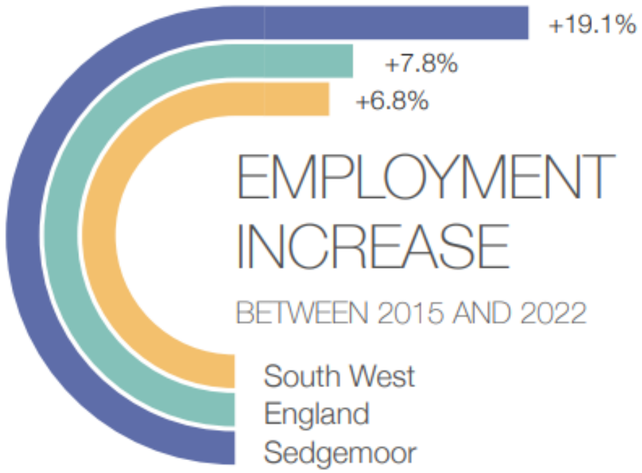
Letty has excelled in her Level 3 apprenticeship in project controls and recently embarked on a second apprenticeship, a Level 6-degree apprenticeship, also in project controls.

Outcomes – Positive Economic Improvement in the Locality

Growth in Lower Age Groups



Employment



Economic Boost



x10

The district area is seeing a growth in the number of medium-sized companies that is ten times higher than anywhere else in the South West

10% higher

The local town of Bridgwater is seeing productivity levels 10% higher than surrounding towns

Building the Legacy

2011 → 2026





- The HPC development acts as a **key driver for the achievement of a more dynamic, entrepreneurial, inclusive and sustainable economy** in Somerset and the wider region.
- To **develop Somerset as a centre of excellence for low carbon use, with a strong business and educational reputation** for low carbon and environmental technologies.
- **To ensure the HPC development maximises employment and skills opportunities for local people**, whilst inspiring young people to achieve
- **Raise the aspirations of the young people in Somerset** to improve retention and increase participation.
- **Support our partners to tackle worklessness, providing pathways that provide opportunities** for up-skilling, which lead to sustainable employment.

Thank You

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FELIX MANN

Head of Global Corporate Communications
Agratas

AGRATAS: DELIVERING THE UK'S LARGEST BATTERY MANUFACTURING FACILITY IN SOMERSET

Felix Mann

Global Head of Corporate Communications

18 May 2026

Agratas – Tata Group’s global battery business

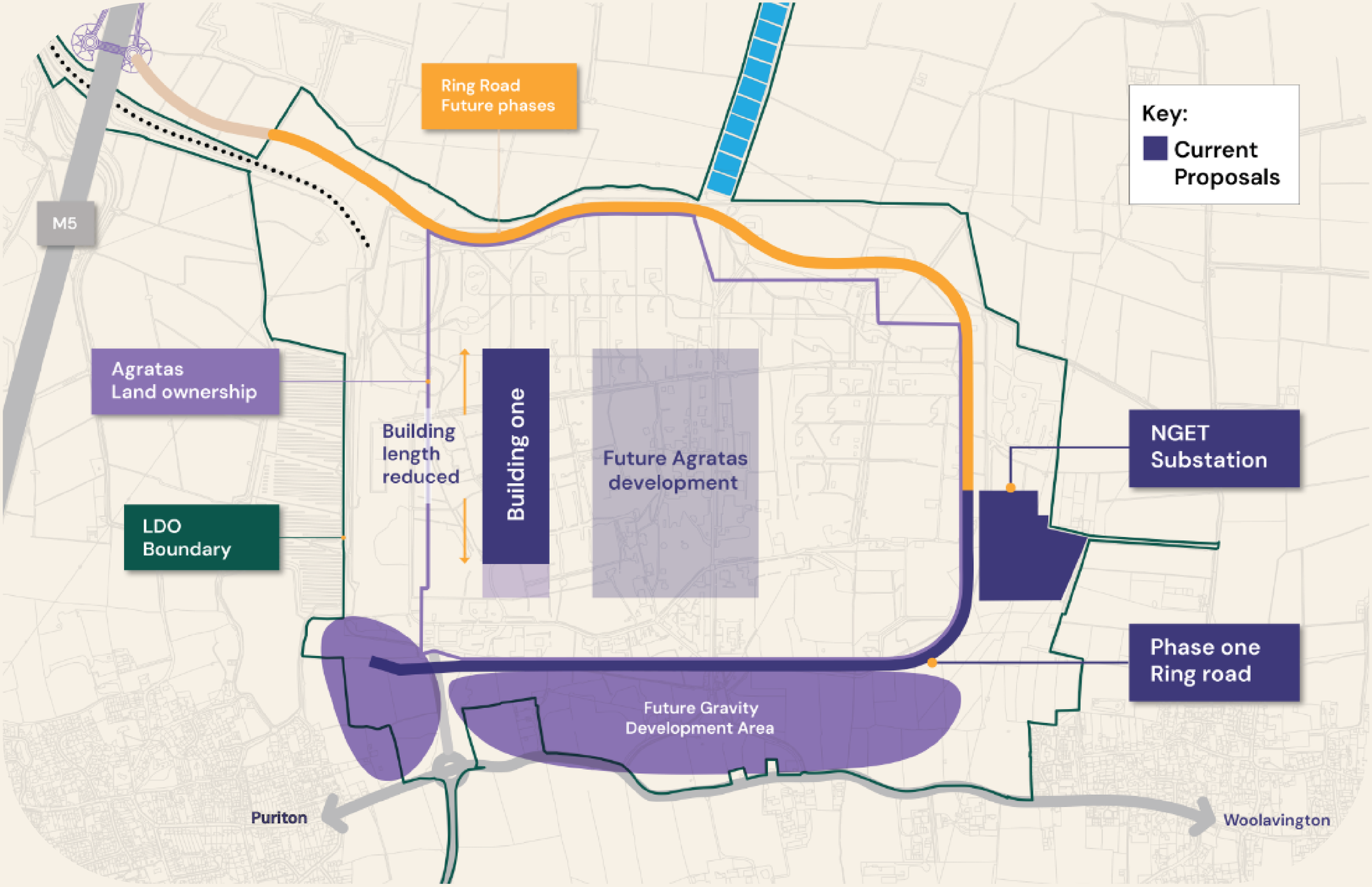
Multi-billion-pound investment in the South West by one of the world’s biggest conglomerates

UK’s largest battery manufacturing facility – driving growth, creating and supporting employment, enabling the net zero transition

Generating £700m p/a in value for the South West and £43bn in GVA nationally to 2050

4,000+ jobs across our full facility and 1,500 jobs for the first phase




Ring Road
Future phases
Key:
Current Proposals
M5
Agratas
Land ownership
LDO
Boundary
Building
length
reduced
Building one
Future Agratas
development
NGET
Substation
Phase one
Ring road
Future Gravity
Development Area
Puriton
Woolavington

Video: Site development timelapse

Source: https://brand.agratas.com/share/XUE3pXn8g8Tm7RFMLC21

February 2024



March 2026



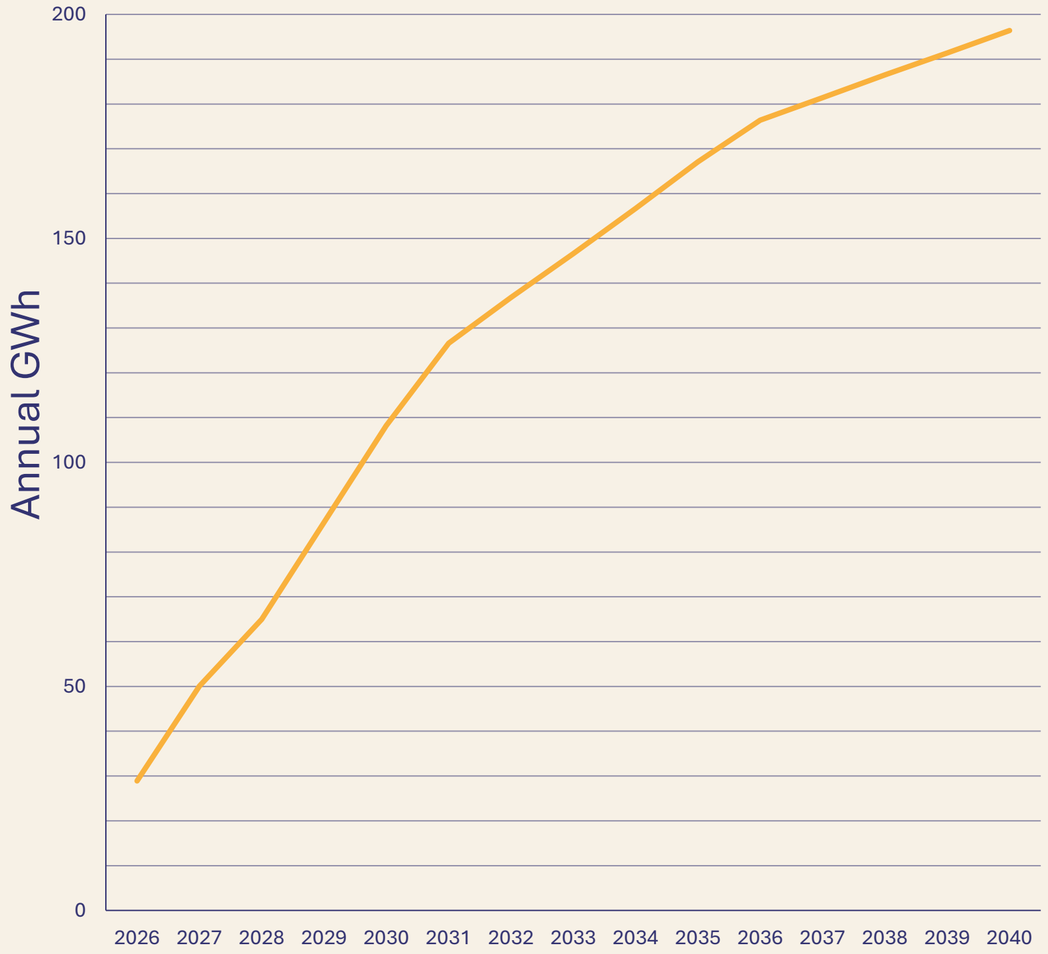
Value chain opportunities in the South West

UK battery demand forecast to increase – regional value chain opportunities created by Agratas and HMG's Industrial Strategy

- **Critical minerals** extraction and processing
- **Cathode active material** (CAM) manufacture
- Wider production material inputs **sourcing**
- Battery scrap and end of life battery **recycling**

Collaboration opportunities for the region and partners – agglomeration and developing an advanced manufacturing cluster

Potential Demand for UK-Produced Batteries (GWh to 2040) (Faraday Institution, 2024)



Supporting major projects – Agratas lessons

Challenging industrial operating environment in the UK – high energy costs, inflation, cost of borrowing, labour costs

Agratas provides a playbook and key delivery lessons on opportunities and challenges. We can help stimulate and steer further investment in the region

- **Gravity Business Leaders Group** well-placed to consider investment support
- Coordinating political support with **regional MPs**

Example interventions:

Strategically located **investor-ready sites**

Infrastructure connectivity, e.g. transport, grid connections

Support and coordination from **across government (national and local)**

Regional **supply chains and skills and labour** availability

Regional labour market and skills pipeline

Specialist skills are essential for industrial growth and innovation (national issue)

- **Public-private partnerships** – education and businesses working together (five new Technical Excellence Colleges in the region)
- Building on proven **template models** for skills development – Agratas and UCS
- Working with **national and local government** on workforce and skills interventions

Key challenge – increased competition for technical and specialist skills in the region



Agratas and UCS MoU Signing – March 2026

agratas
A TATA Enterprise

Thank you

Follow Agratas on LinkedIn, Instagram and WhatsApp for project updates and upcoming opportunities

SOUTH WEST BUSINESS COUNCIL
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EMILY HATCHER

Head of People & Culture
Altilium Clean Technology



Scaling a Circular EV Battery Supply Chain in the South West

18th May, 2026

The UK's unique market opportunity

altilium™ clean technology

Growing Automotive and BESS market requiring end-of-life battery solutions

Strong and stable regulatory environment for electrification with grant system

Over 2 million EVs registered, 1 in 3 new cars sold is electric



Largest second hand car market in Europe

2030

70 GWh battery production by 2030 – millions of tons of battery scrap for recycling





Building a UK champion for EV battery recycling




Warning


altilium
clean technology
ACT2


Chemical
Storage






altilium
clean technology



Scale-up from pilot to industrial-scale

A strategic pathway to industrial scale battery recycling and manufacturing of battery ready cathode and anode battery materials in the UK

ACT 1
R&D Technology Centre

Developing proprietary battery recycling processes with integrated CAM production

Tavistock, UK



Operational

12 Batteries Processed p.a.

- **Recycled CAM tested in new batteries with OEMs, demonstrating comparable performance with primary mined materials**
- **Scaling of EcoCathode™ process at ACT2 providing key insights for future growth**

ACT 2
Pilot plant

Production of limited volumes of CAM for qualification with automotive OEM's & cell manufacturers

Plymouth, UK



Operational

300 Batteries Processed p.a.

- **Revenues from day 1 via MHP**
- **£18.5m funding from UK Government DRIVE35 Scale-Up fund**

ACT 3
First Commercial Scale Plant

Large-scale production of intermediate MHP materials to validate Altilium's industrial process at scale

Plymouth, UK



2027/28

24k Batteries Processed p.a.

- **Modular design enables production of battery metal salts during first phase of commissioning, allowing for revenue generation while customer qualification of CAM continues**

ACT 4
Mega-scale recycling plant

Large-scale production of battery metal salts & pCAM/CAM materials to OEM & cell manufacturers

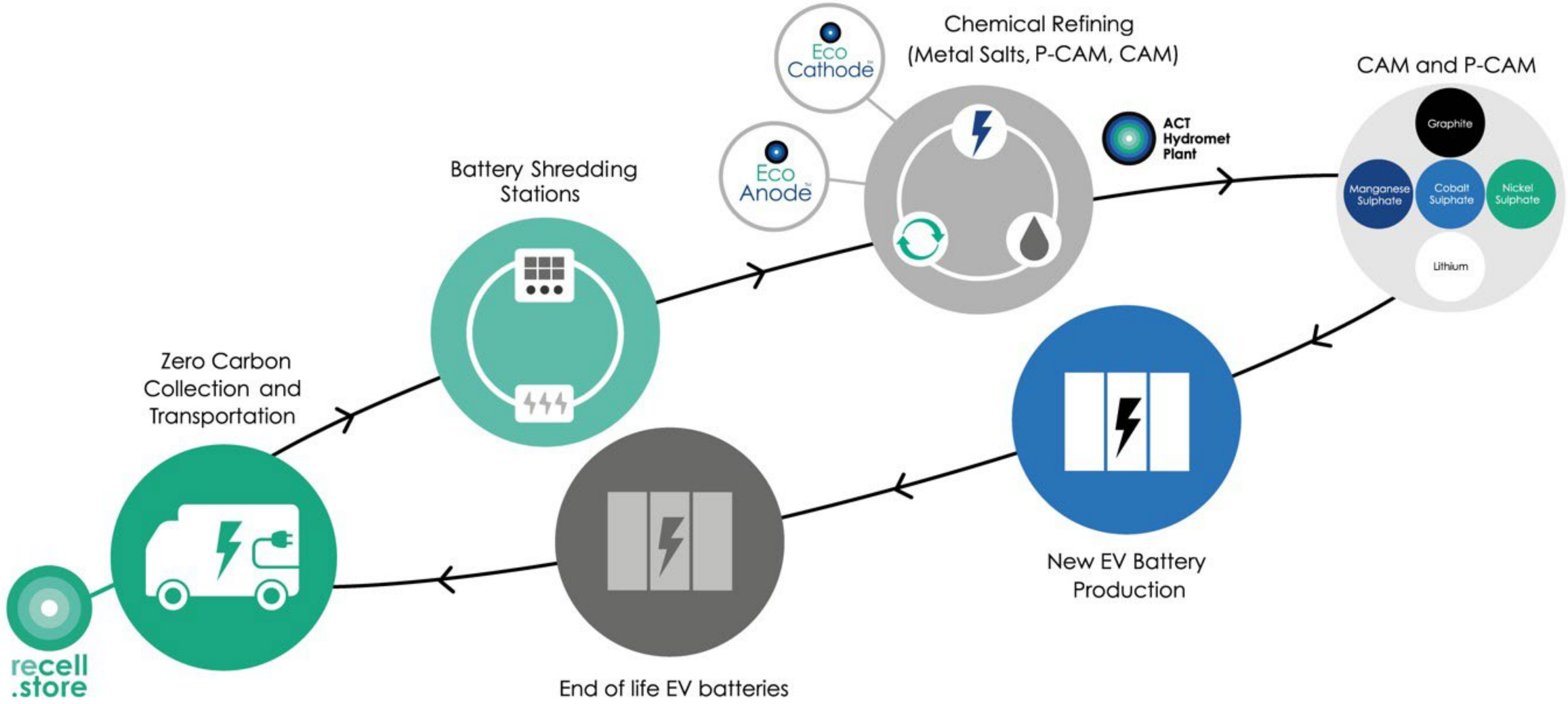
UK



Stage 1: 2029
Stage 2: 2032

150k Batteries Processed p.a.

Altilium's full battery circularity model



Partners in innovation

Foundation investors – blending experience and scale

- SQM is the largest Lithium miner and refiner in the world

- Japan's leading trading and investment group.

- Leading global bank, one of the largest customer bases in Japan.
- Top 50 global bank.

Driving clean growth in the South West

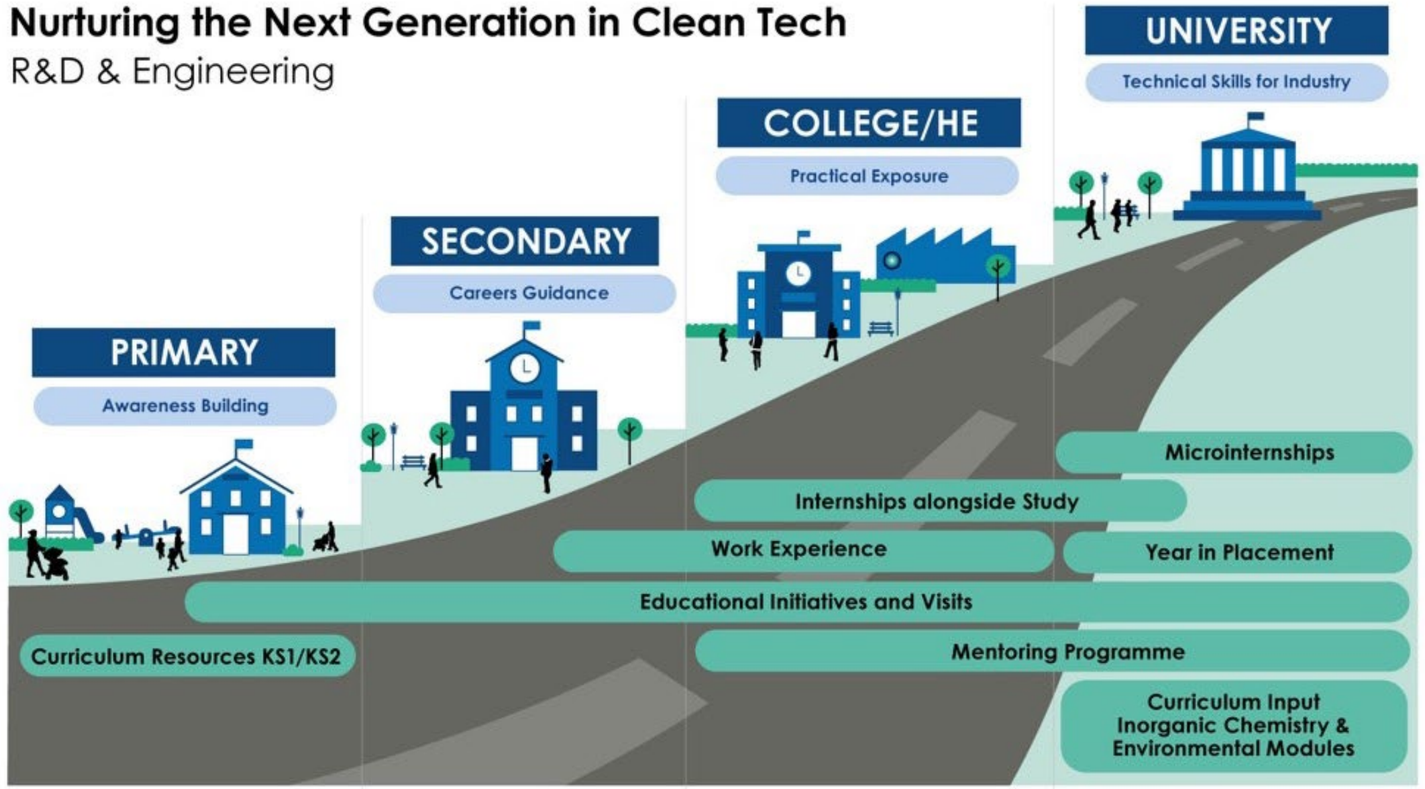
ACT:A
The Altilium Clean Tech Academy

29 Number of new jobs created in last 2 years

70+ Number of local jobs planned for ACT3 expansion

131 Total number of students supporte in 2025

£159k Social Value Delivered in 2025



Notable Initiatives

Local Impact:

- *Girls in STEM* – inspiring young women into STEM careers
- *Upcoming City College's Blue/Green Development* – creating learning and skills opportunities locally
- Various skills injection initiatives from primary school through to university

National Impact:

- *Minerals Matter* – program introducing clean energy topic early from KS2/3
- 'Skills for the Circular Economy' report Input – partnered with Department for Business & Trade, identifying UK skills gaps and talent needs to support the circular economy

Thank you

www.altilium.tech



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DAVID WILLIAMS

Snr Partner, South West & Wales, KPMG UK

18 May 2026

The South West and its critical role in delivering growth for the UK…

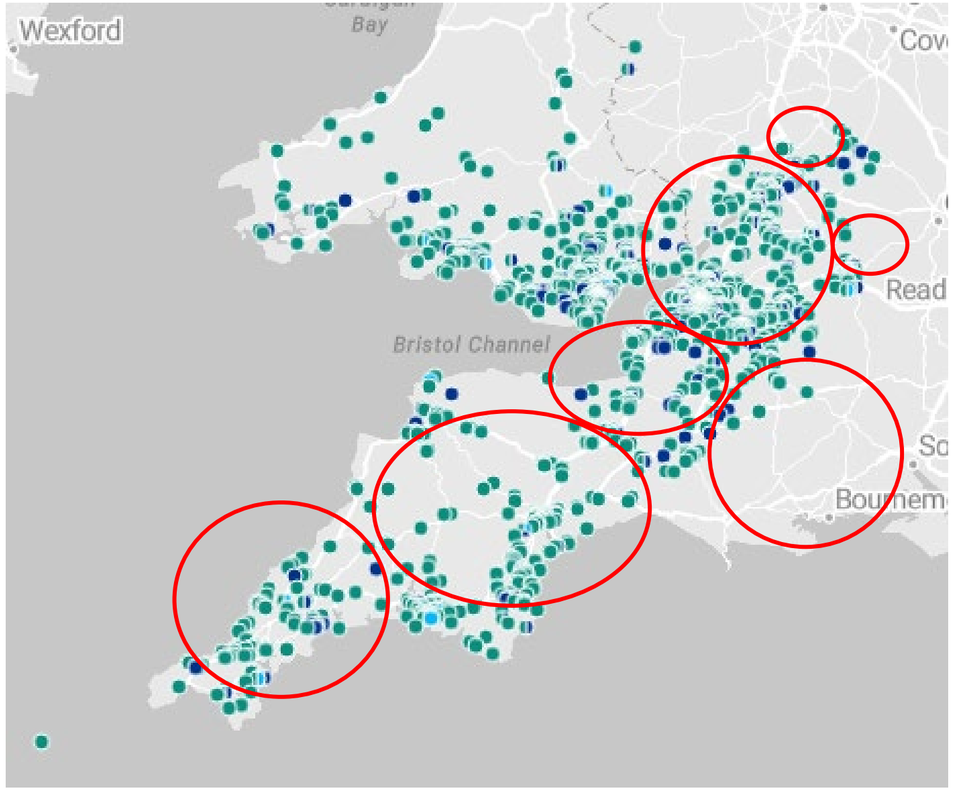


David Williams
KPMG South West Regional Office Senior Partner

KPMG. Make the Difference.

The Region – Southwest

South West (and Wales) is likely to grow by 1.4% per year between 2024 and 2029, outstripping the growth of other parts of the UK. This has been put down to the area's skilled work force, world leading industry and high-tech business with strong sectors in cyber, green energy, aerospace, creative and fintech.



Distinct business sub-regions:
- West of England ('Bristol City Region')
- Individual South West clusters (Cornwall, Devon, Somerset, Dorset, Wiltshire and Gloucestershire)

It's big and infrastructure is poor:
- Bristol to Plymouth – 130 miles (2.25 hours)
- Cornwall to Gloucestershire – 235 mls (4 hours)

	Southwest	Wales	UK
Employment rate (%)	78.8	69.8	75
Population (2021)	5.7m	3.1m	67m

Region strengths
- Attractive place to work
- Proximity to London
- Dynamic jobs/businesses
- Exciting culture
- Green and new economy
- Brabazon & Golden Valley (egs)

Region weaknesses:
- Inequality
- Housing
- Education
- Poor infrastructure
- Under-investment

Note: These figures extracted from Smart Target.

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South West Economic Outlook

Insights – South West

Demographics

- The population of South West was **~5.9 million**, with them being home to **~61 percent** of working population in 2024, with little change in structure over recent years.
- Employment rate of the region stood at **78.6 percent** (South West). This is 0.5 percent up from the year ending March 2024.
- Owing to the high share of young working population and employment rate, In 2023, Gross disposable household income increased by **10.1 percent** (South West) year on year. This follows sustained growth over the past year, demonstrating that households have gradually more income available for spending or saving relative to the previous year. Total GDHI was **£144.4 billion** (South West) existing in the region as of 2023.

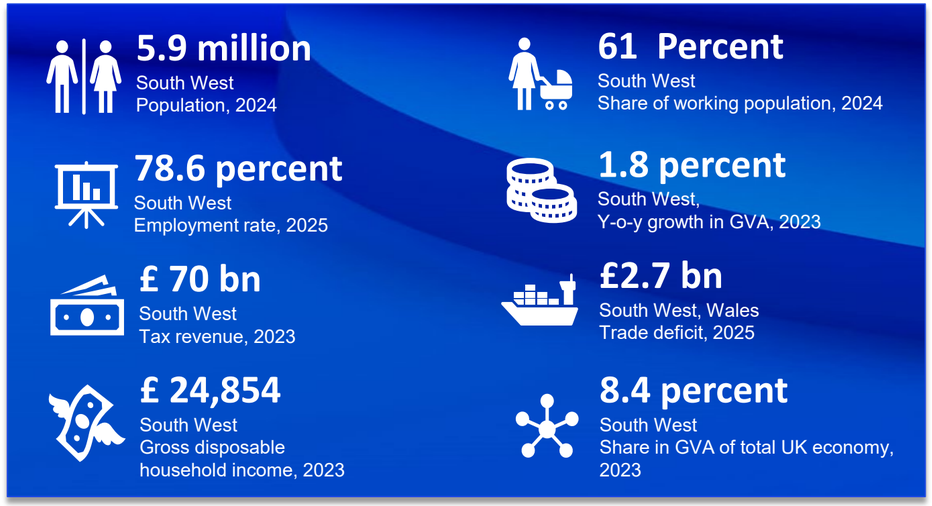
Business activity

- At the start of 2025, South West had **~ 9 thousand** more private sector businesses compared to 2024, reflecting a modest **2 percent** increase in overall business counts. .
- Small business formation recovered after pandemic lows with **~ 890,500** new UK businesses registered in 2023-24 in South West, up over **11 percent** on the prior year. Total Early-Stage Entrepreneurial Activity rate rising to **11.5 percent** in 2023, up sharply from **7.8 percent** in 2022.
- GVA in the South West area reached **£207.6 billion** in 2023, making it one of the larger UK regional economies and showing positive value creation over time.

Trade activity

- An increase in FDI net inflows, owing to the initiation of **120 new FDI projects (**South West and Wales) during 2024-25 has contributed to the growth of economic activity and created employment of **5,000+ jobs**.
- The regions also incur a **trade deficit** in 2025, with the value of **exports at £27.5 billion** (South West) and **imports at £30.2 billion** (South West),.The region is experiencing the combined effects of slowing global demand and softer manufacturing markets, with exports generally below peak post-pandemic levels.

Bristol is the economic hub for the Region…



Source: UK Government data



Source: *South west & Wales Economic growth, Welsh Economy dashboard, Labour Market Statistics , Economic activity status, England and Wales: Census 2021 ; all accessed on 24 February 2026.*

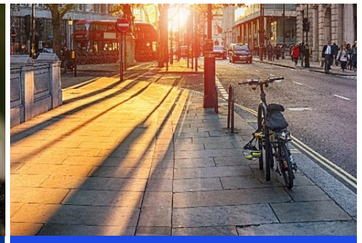
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Bristol – Our community



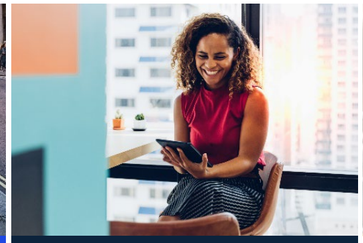
Vibrant & growing

- 2nd fastest growing UK city
- A young city (median age 34 years vs UK 40 years)
- 472,000 in the City, 1.1million in the wider City Region
- Bristol is ranked the top UK city for tech jobs, with 33,000 jobs in 2023



Green creds

- First UK city to be European Green Capital
- First Cycling City in 2008
- Highest recycling City in UK



Independent spirit

- The Bristol Pound
- Longest chain of independent shops in Europe
- Home of British graffiti scene



Multicultural

- At least 45 religions, residents from 187 countries, and 91 main languages spoken.



Economic challenges

- 92nd out of 316 most income deprived
- Bottom 20% of local authority areas for health in 2021. Mental health of residents compares poorly to other areas
- Inadequate housing supply, high house prices/rents, poor public transport

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Investment in the Region

£2bn investment to develop 2,675 new homes, up to 540,000 sq ft of industrial space, and a new arena on the Brabazon, Bristol site

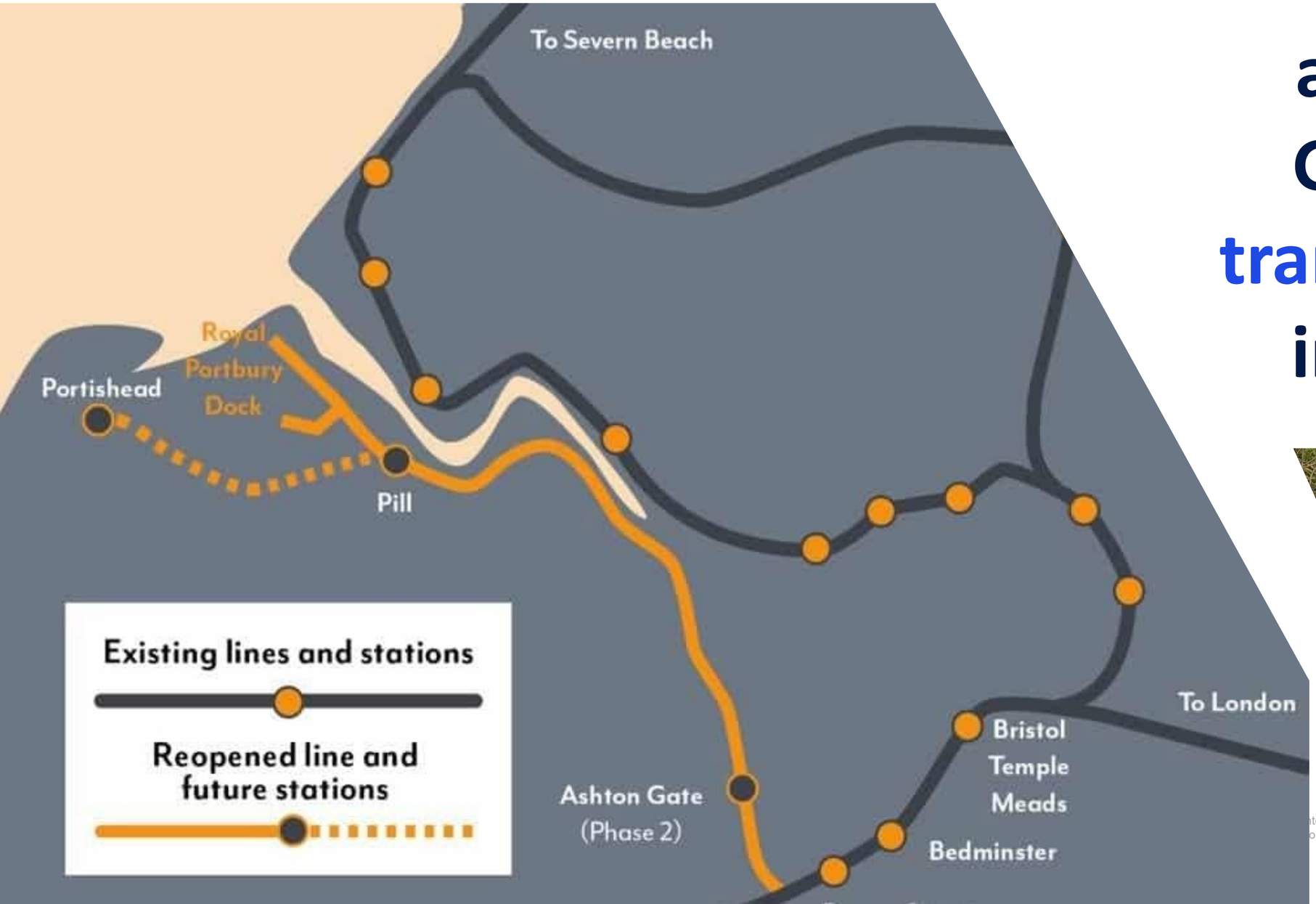


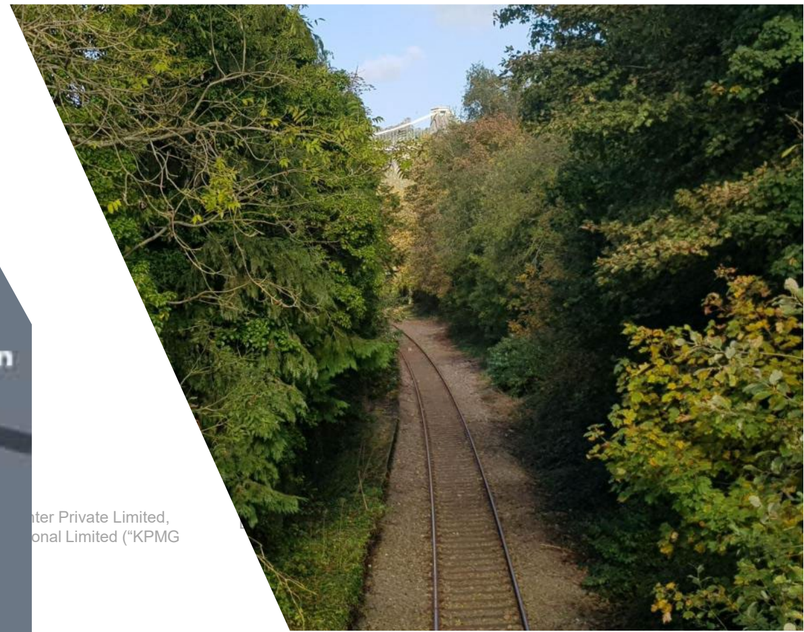


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Investment in the Region

£800m funding approved by UK Government for transit investment in WECA region.





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onal Limited ("KPMG

Investment in the Region



Cheltenham's Golden Valley cyber corridor development

£1billion Golden Valley development

The Golden Valley development will be built on land next to GCHQ and aims to confirm Cheltenham as the UK's cyber capital.

The development is expected to create 12,000 new jobs and 3,700 houses.

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Investment in the Region



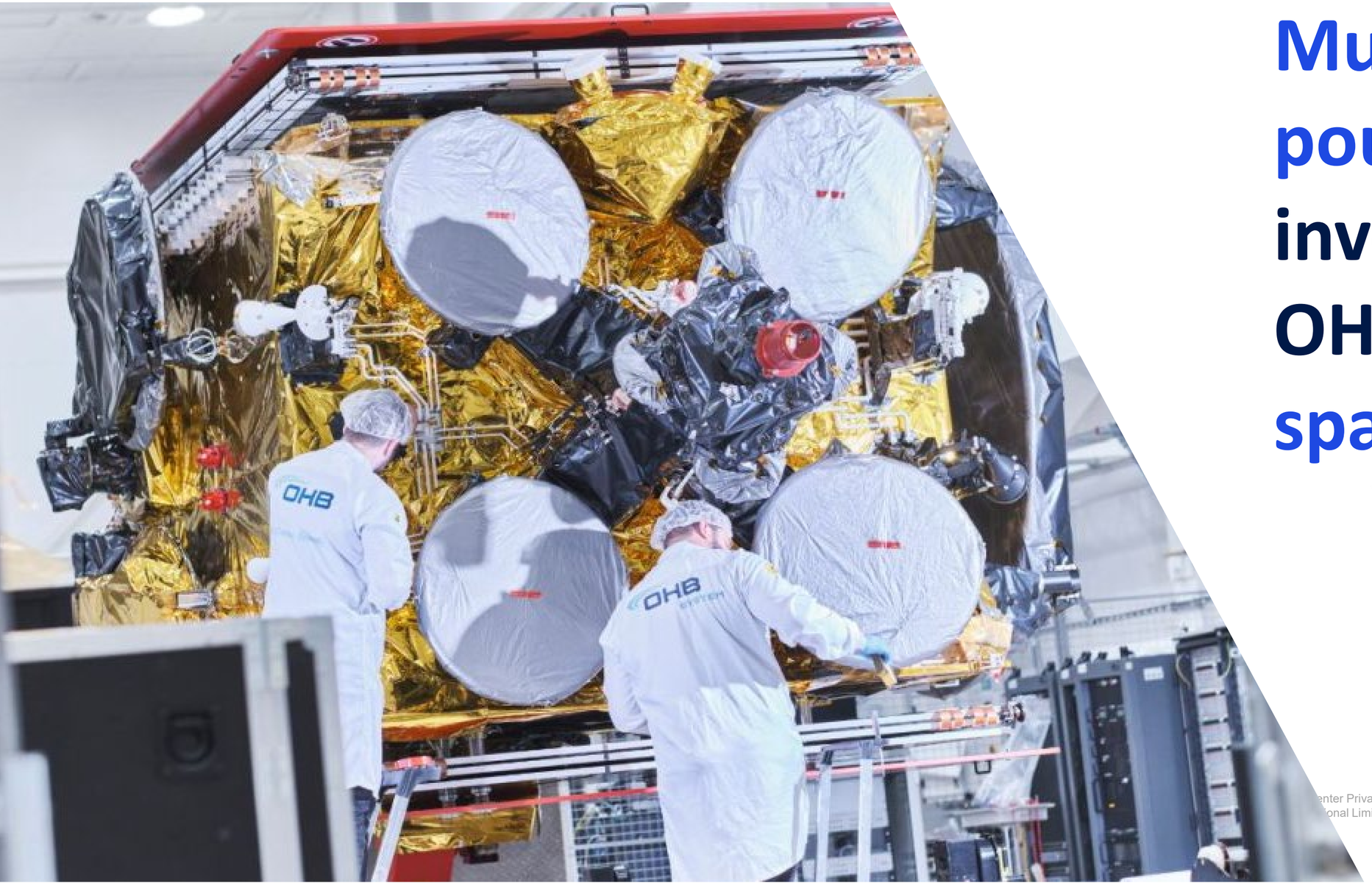
Bristol Temple Quarter Enterprise



- The transformation of Bristol Temple Quarter is one of the UK's largest regeneration projects.
- With £95m government support and delivery already underway, Bristol Temple Quarter is being led by a public sector partnership between Bristol City Council, Homes England, the West of England Mayoral Combined Authority, and Network Rail.
- The vision is to transform over 130 hectares of brownfield land over the next 25 years into a series of thriving, well-connected mixed-use communities.
- The regeneration of the area will create 10,000 new homes, thousands of new jobs and bring £1.6bn annual income to the city economy.

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Investment in the Region



Multi-million pound investment by OHB in Bristol space park



enter Private Limited,
onal Limited ("KPMG
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The South West and its critical role in delivering growth for the UK…

Thank you

David.Williams@kpmg.co.uk

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SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater



ANDREW GRIFFITHS

Chief Financial Officer, Bristol Airport



Andrew Griffiths

Chief Financial Officer

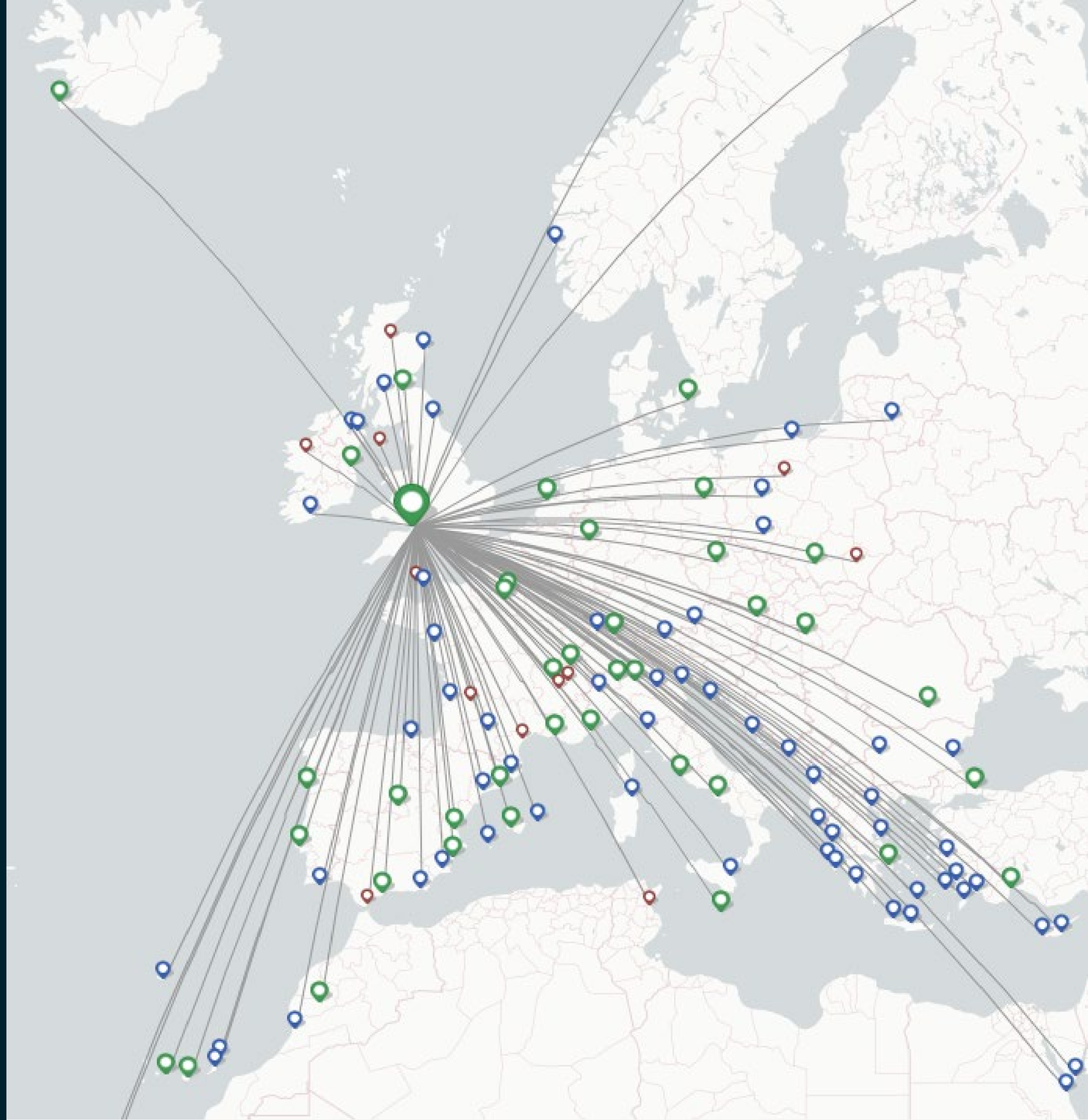
Bristol Airport



Our region’s primary airport

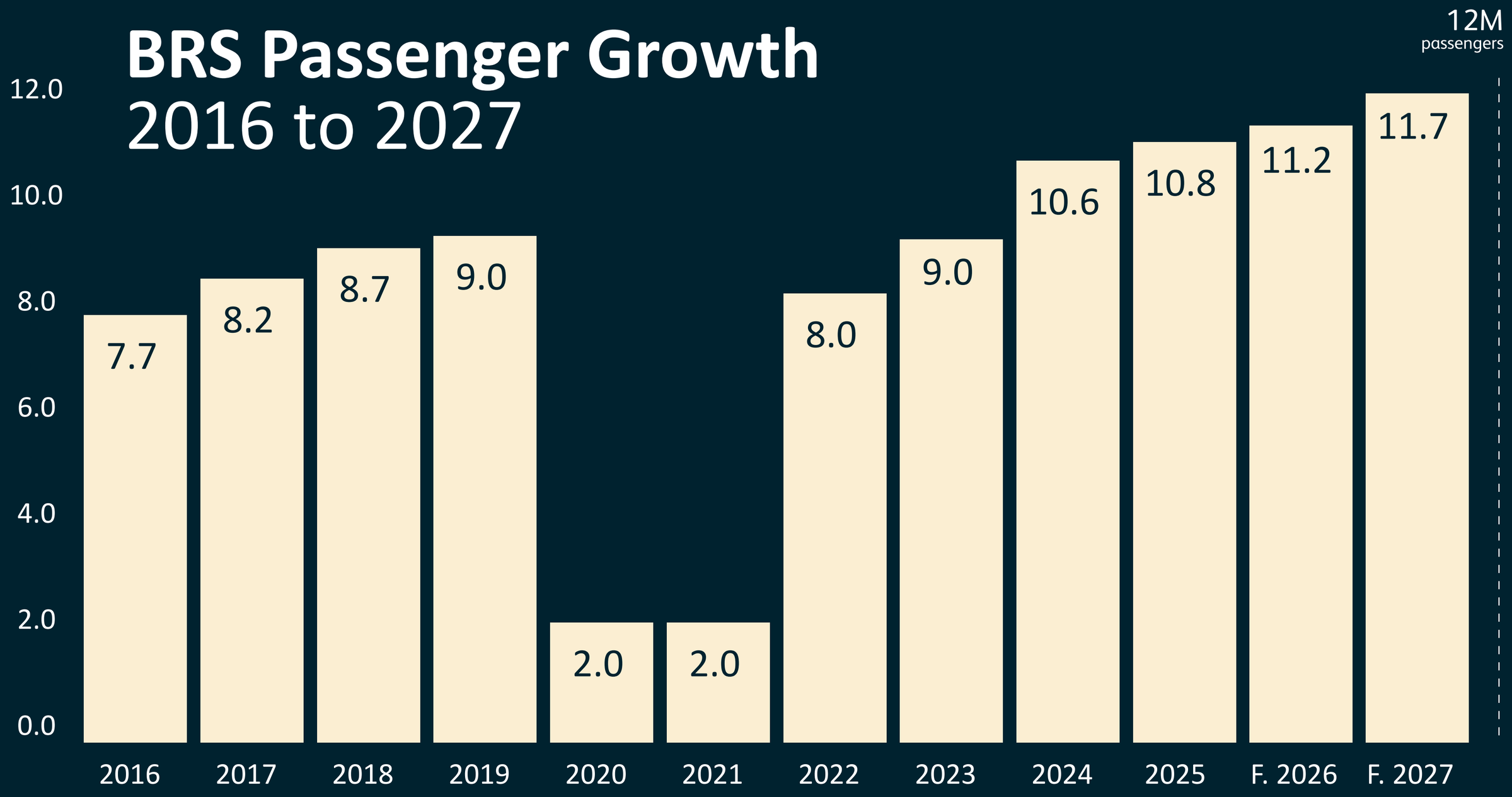
Bristol Airport

120 destinations **in 2026**



Bristol Airport

BRS Passenger Growth
2016 to 2027



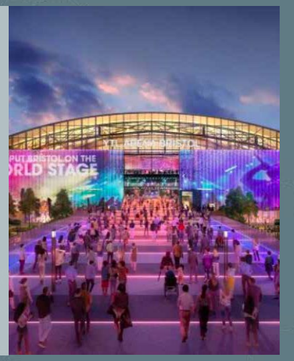
Bristol Airport

Strong & Growing **Regional Economy**

Leisure and high-tech industries less than an hour from Bristol Airport.

Bristol's first 20k seater arena

- Part of YTL Brabazon's new town development
- Thousands of new homes, 62 acres of employment space



New Bristol Temple Quarter

- One of the UK's largest regeneration projects
- New university campus, 22k jobs, 10k homes



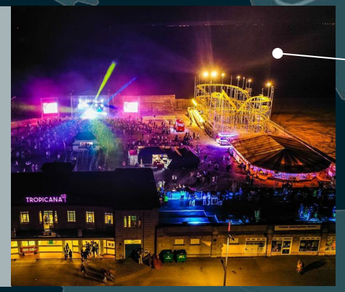
US tech-giant Epic's European base

- New European campus
- 2k new jobs to be created in medical industry



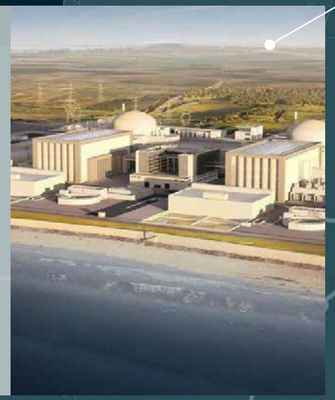
Weston's new 10k capacity venue

- Proposed music venue



Hinkley Point C Nuclear Plant

- One of Europe's largest construction projects
- First new nuclear power station in the UK for over 20 years



UK's biggest electric vehicle (EV) battery plant

- Tata group investment
- Smart campus and
- 1.7k new homes



Bristol Airport



Supporting the local and regional economy

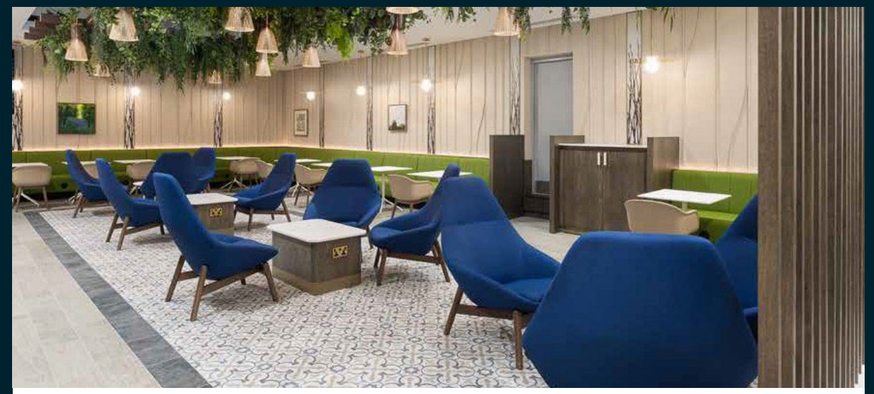
5,800 employed on site, across 50 businesses:

- 25,000 indirect jobs across our region

Economic impact

- £2bn in total economic impact

£400m Investment Programme



Phase 1

Completed

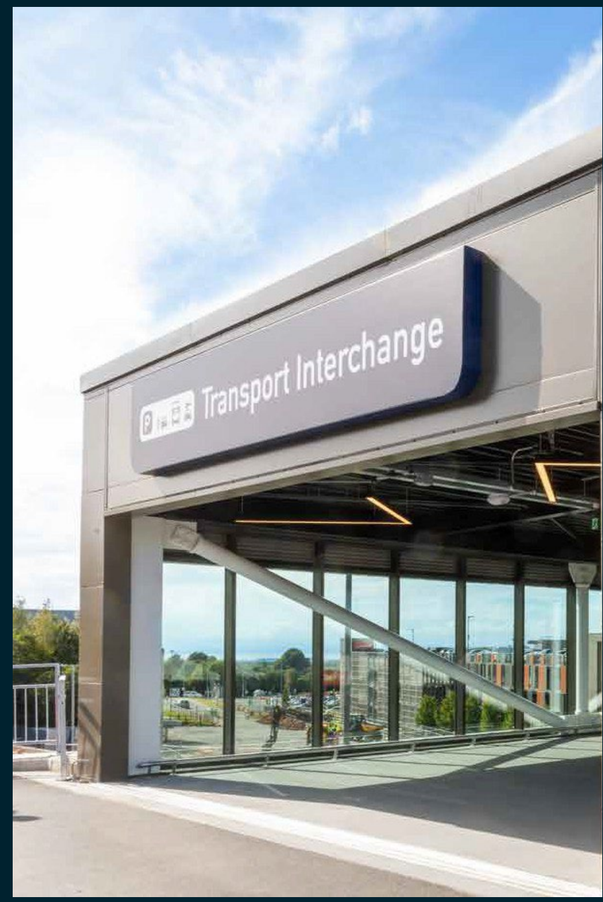
- ✓ Public Transport Interchange
- ✓ Next Generation Security
- ✓ New Airport Lounge
- ✓ Additional Boarding Gates



Phase 2

Started autumn 2025

- Bigger, better terminal
- Exciting new retail and catering offering



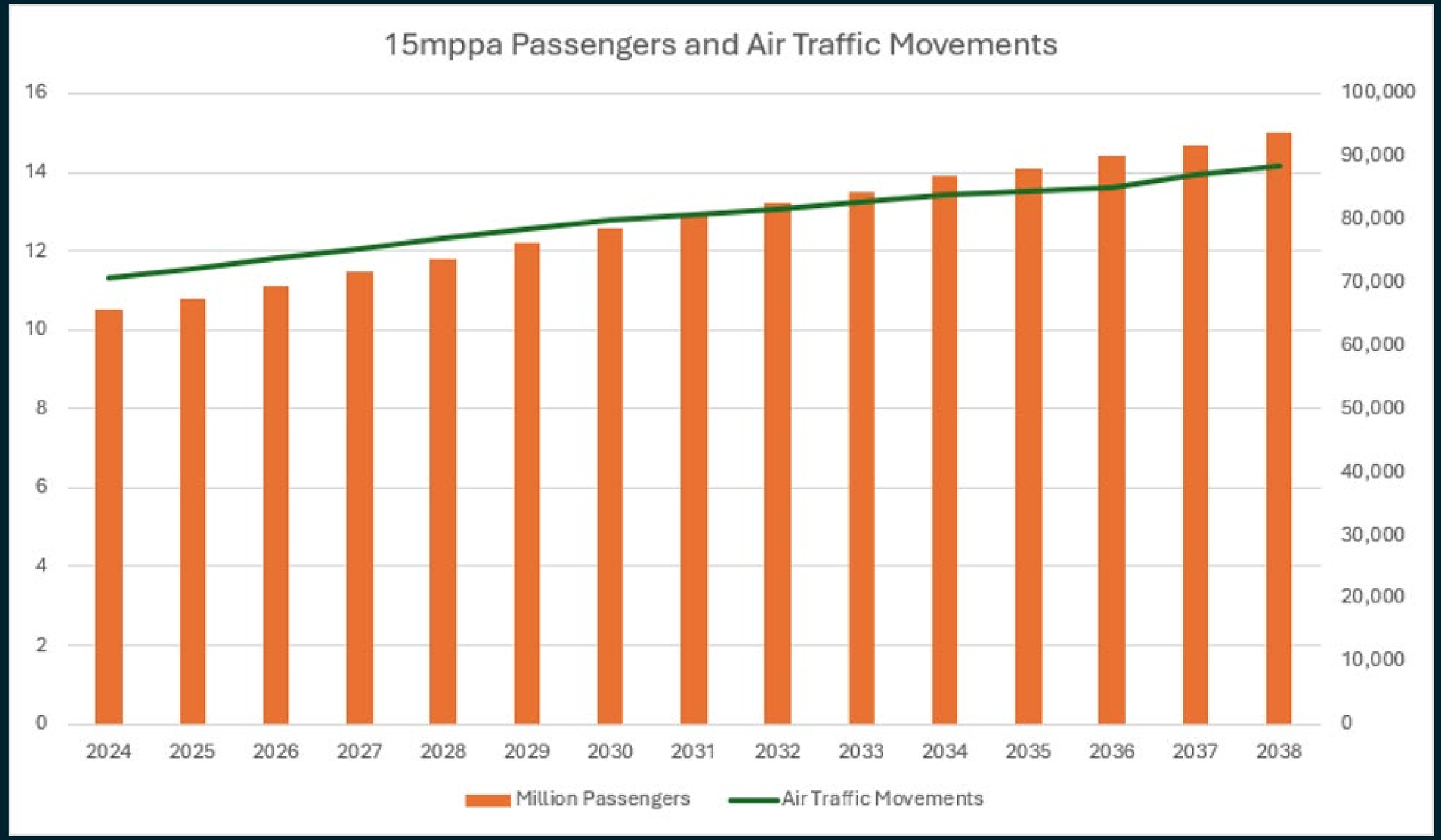
Bristol Airport

Our future
Increasing capacity to 15 million passengers



Bristol Airport

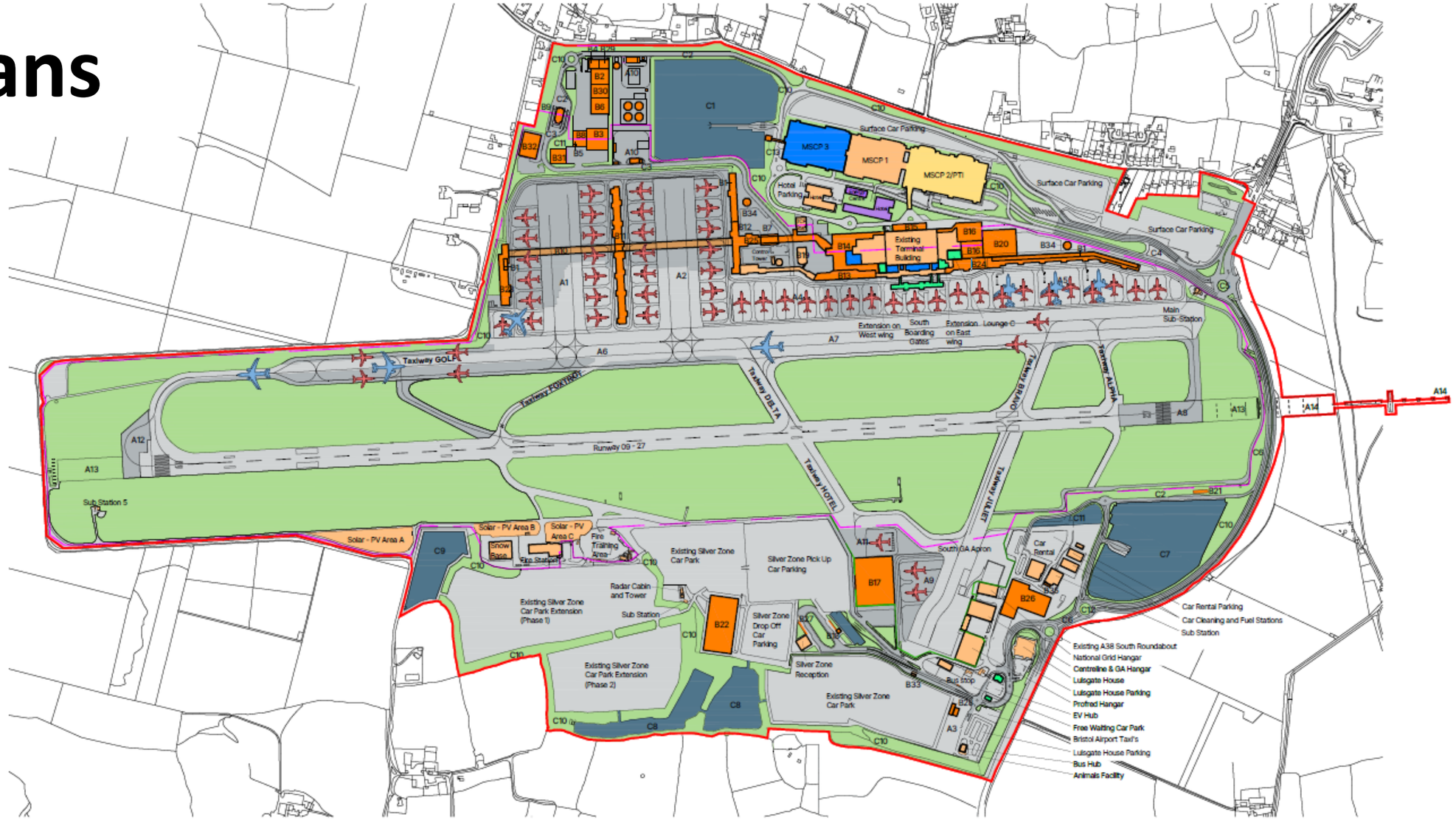
Projected Growth in Passenger Numbers



Bristol Airport

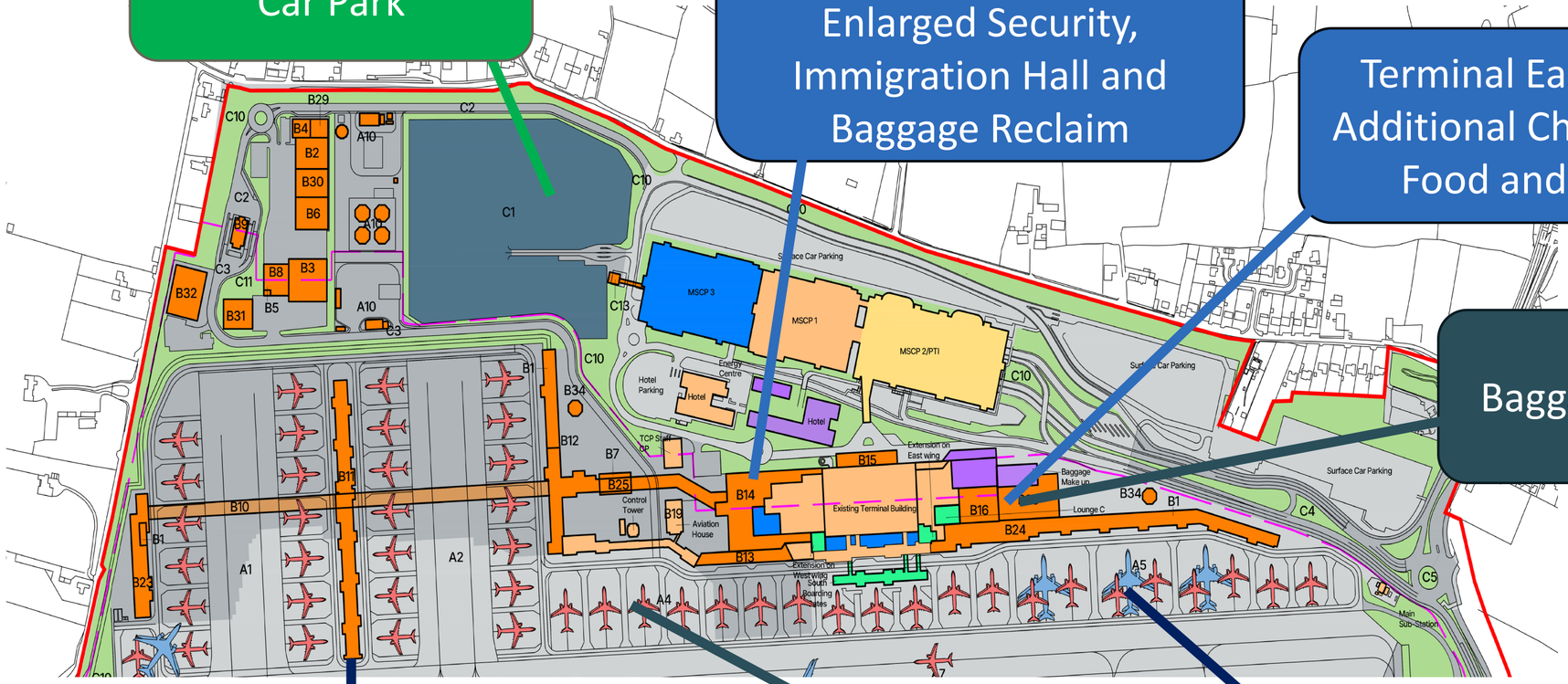
Future **Growth Plans**

- Increasing capacity from 12mppa to 15mppa
- Runway improvement to cater for larger aircraft
- New long-haul route opportunities
- Enhanced customer experience
- Additional aircraft stands and easier boarding



Bristol Airport

Proposed 15mppa Development: Northside



2,000 Space Car Park

Terminal West Extension Extra Capacity, Enlarged Security, Immigration Hall and Baggage Reclaim

Terminal East Extension Additional Check In, Retail, Food and Beverage

Baggage Handling

New Piers, Walkways, Pre-Board Zones and Tunnel

45 Contact Stands vs. 12 at present

Airbridges for larger aircraft

Bristol Airport

Bristol Airport

Proposed 15mppa Development: Runway and Southside



Wider taxiways & Rapid Exit Taxiway

Runway extension

Car Hire Expansion

Silver Zone Reception Improvements

Maintenance Repair & Overhaul Hangar

Bristol Airport

Bristol Airport



CBI Economics

230 businesses in the South West surveyed.

- Strong demand for improved connectivity.
- Airport expansion would boost productivity – reducing travel friction for businesses
- Strengthen supply chain coordination and client servicing.

More than two thirds of businesses in the region said in-person engagement enabled by air travel was important for their business.

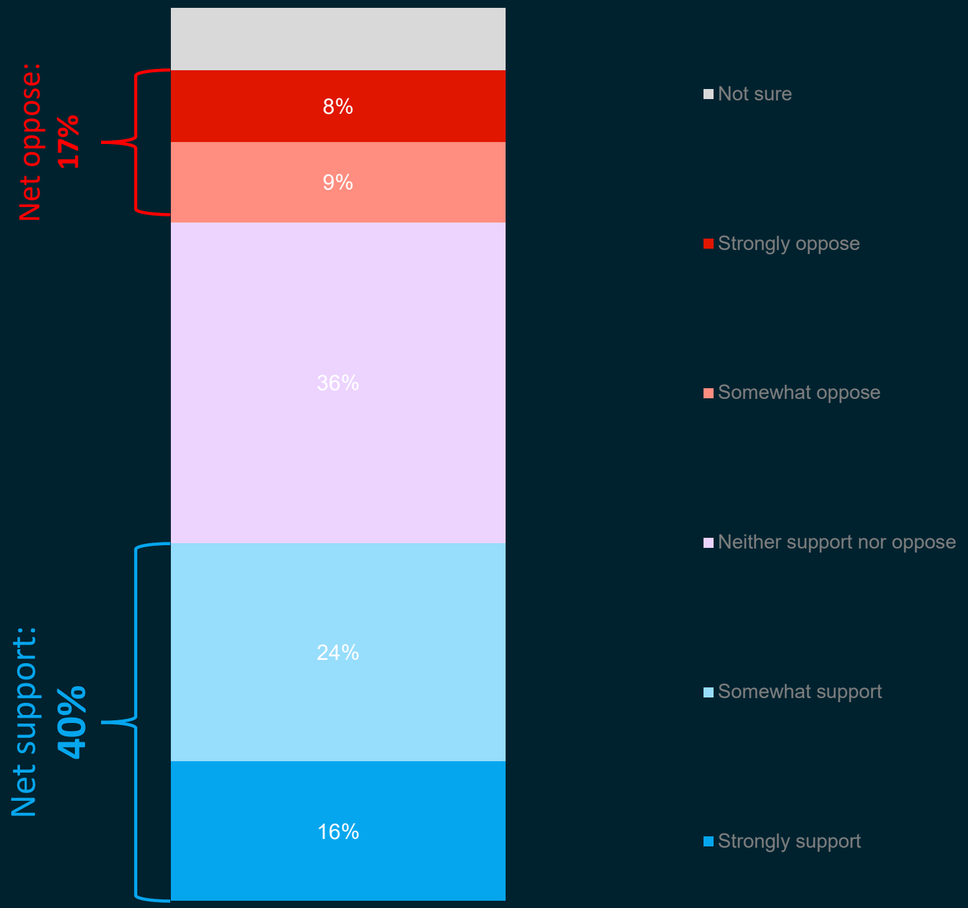
7 out of 10 in the visitor economy said improved long-haul connectivity would increase international engagement with their organisation.

52% of businesses rely on alternative airports. Long-haul at Bristol Airport would improve international engagement

Over a third of businesses expect international travel to increase in the next 1-3 years – connections with places further afield would support these organisations

YouGov®

More than double the number of people surveyed support the growth of Bristol Airport, than those who oppose it.



2,101 people surveyed online in South West of England and South Wales – Nov/Dec 2025

Have your say



Bristol Airport

SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater



DAVID A J BROWN OBE

CEO, The Bristol Port Company

THE BRISTOL PORT COMPANY

‘Logistics and Defence Hub’

18th May 2026

David Brown OBE DL

Chief Executive



THE BRISTOL PORT COMPANY
St. Andrews House, St. Andrews Road, Avonmouth, Bristol, BS11 9DQ
www.bristolport.co.uk
0117 982 0000

BLUF

THE BRISTOL PORT COMPANY



What % of imports and exports come through UK Ports?

95%

Bristol Port - 1991

THE BRISTOL PORT COMPANY



Bristol Port - Today

THE BRISTOL PORT COMPANY



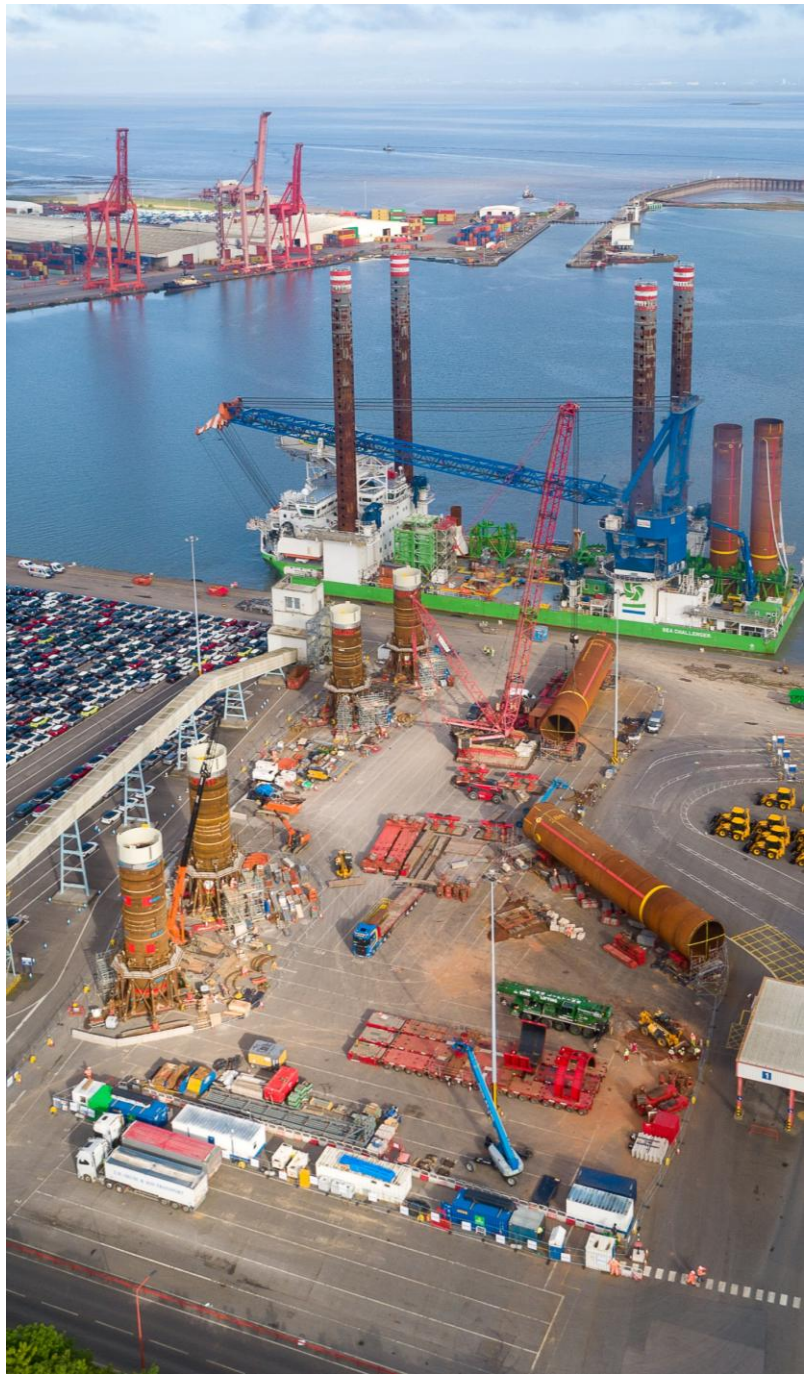
Bristol Port Today

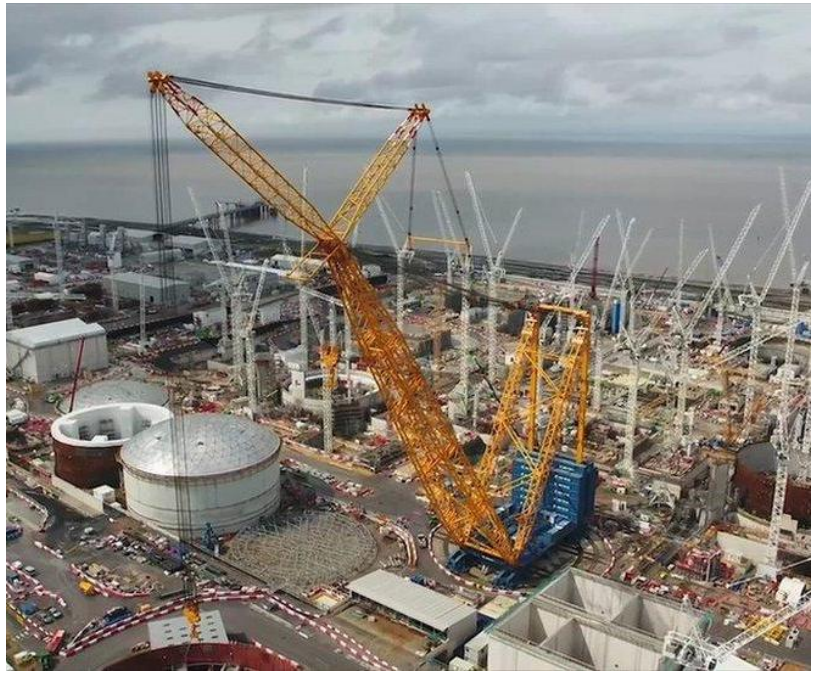
THE BRISTOL PORT COMPANY

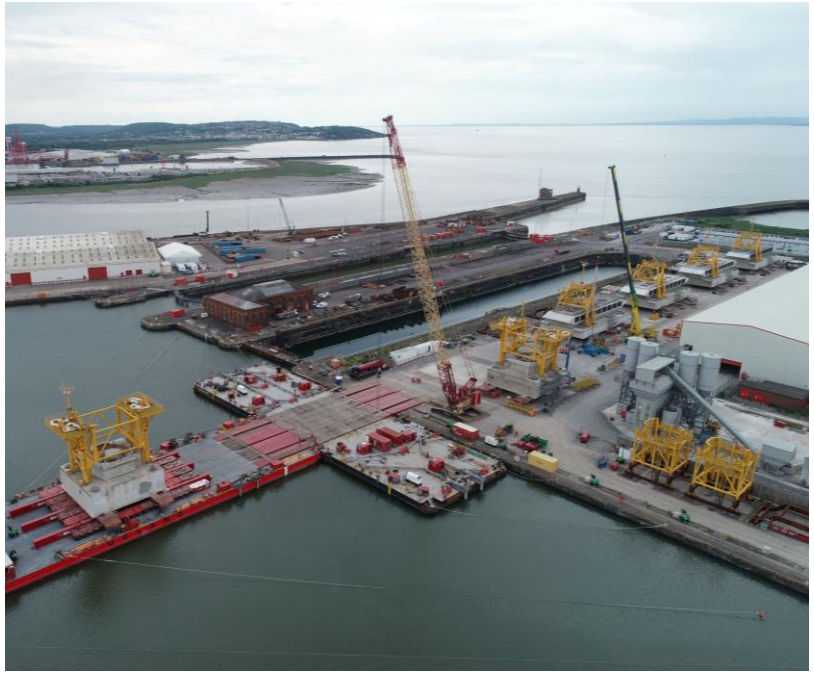
1. 2,600 acre Freehold site in Avonmouth and Portbury
2. Most diverse Port in the UK
3. Handles on average 10 million tonnes of cargo and over 2,000 vessels annually
4. £600M of ***private*** investment since 1991
5. £1.3 billion contribution to UK GDP (according to Oxford Economics 2025)



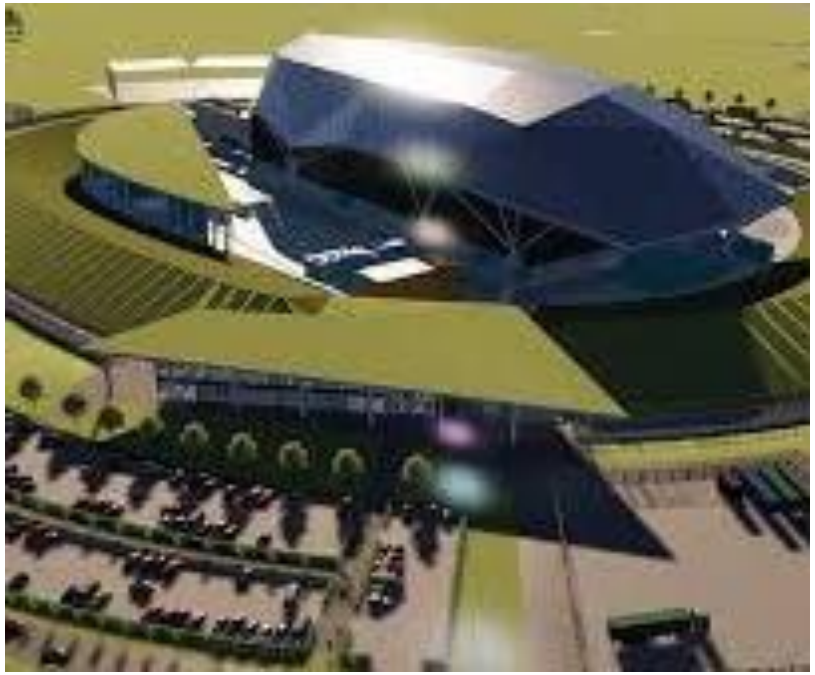




















110,000 car storage spaces

665,000 vehicles per year

25% of UK new car sales

500 car vessel calls per year

Mitigating Regulatory Drag

THE BRISTOL PORT COMPANY



Indicative costs (excl. VAT) for c. 5.15 biodiversity units	Construction Costs	Local Habitat Bank BNG Costs	Statutory BNG Credit Costs
	c. £40k	c. £165k	c. £526k

Keeping the business accelerator on Growth

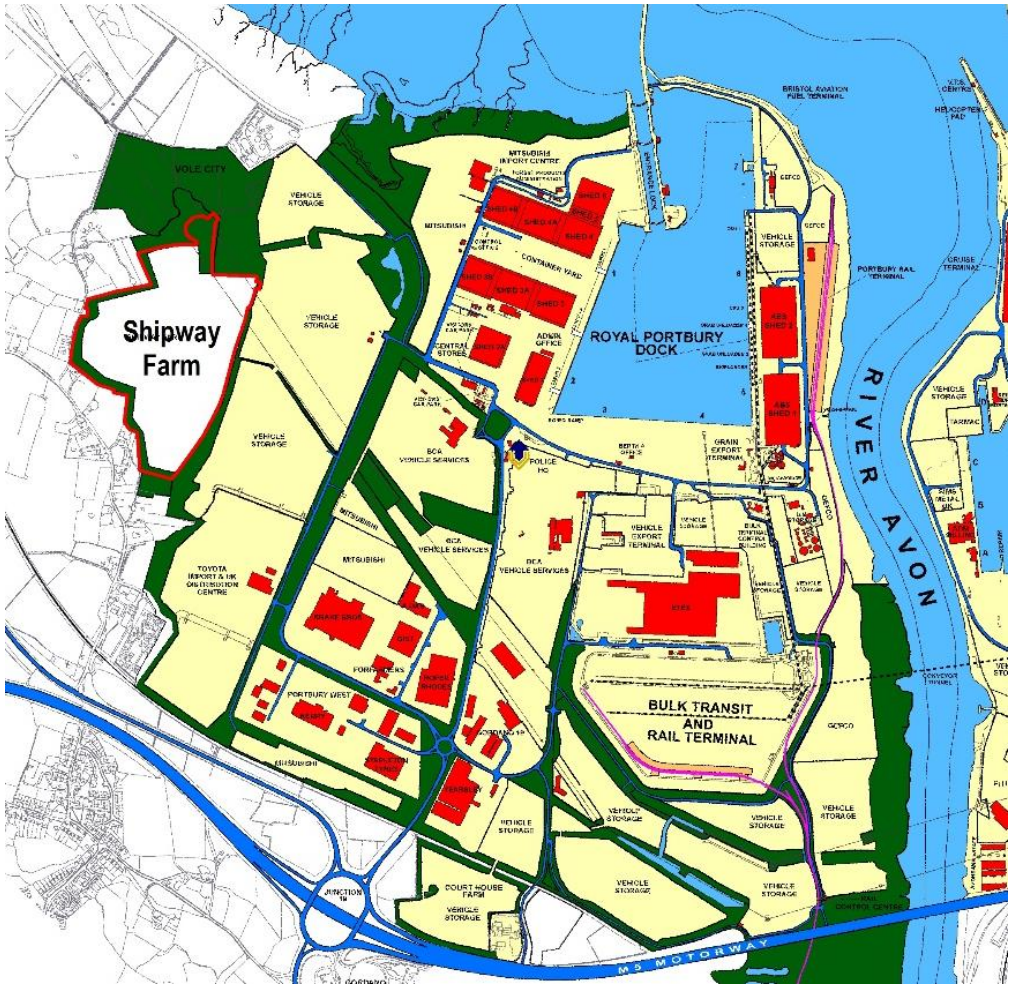
THE BRISTOL PORT COMPANY



Kickstart economic growth

Make Britain a clean energy superpower








WEST OF ENGLAND GROWTH STRATEGY
WEST OF ENGLAND
MAYORAL COMBINED AUTHORITY


Severn Estuary Growth Zone
West Innovation Arc
Central Bristol & Bath Growth Zone
North Somerset Growth Gateway
Somer Valley Growth Zone


Over the next decade 5 priority sectors will drive our growth potential
WEST OF ENGLAND PRIORITY GROWTH SECTORS
1 ADVANCED MANUFACTURING
2 DIGITAL & TECHNOLOGIES
3 CLEAN ENERGY INDUSTRIES
4 CREATIVE INDUSTRIES
5 EVERYDAY ECONOMY


Bristol Wind Terminal


Oldbury SMR Site


16 Million Sq Ft Warehousing

Our Quay Workers

THE BRISTOL PORT COMPANY



SOUTH WESTBUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater



COLIN TAYLOR

Senior Flood & Coastal Risk Managament Advisor
Environment Agency

South West Business Council

Major Projects Conference - Delivering in the South West

May 2026

Colin Taylor



Tidal Barrier Scheme

Environment Agency

Somerset Council

KIER

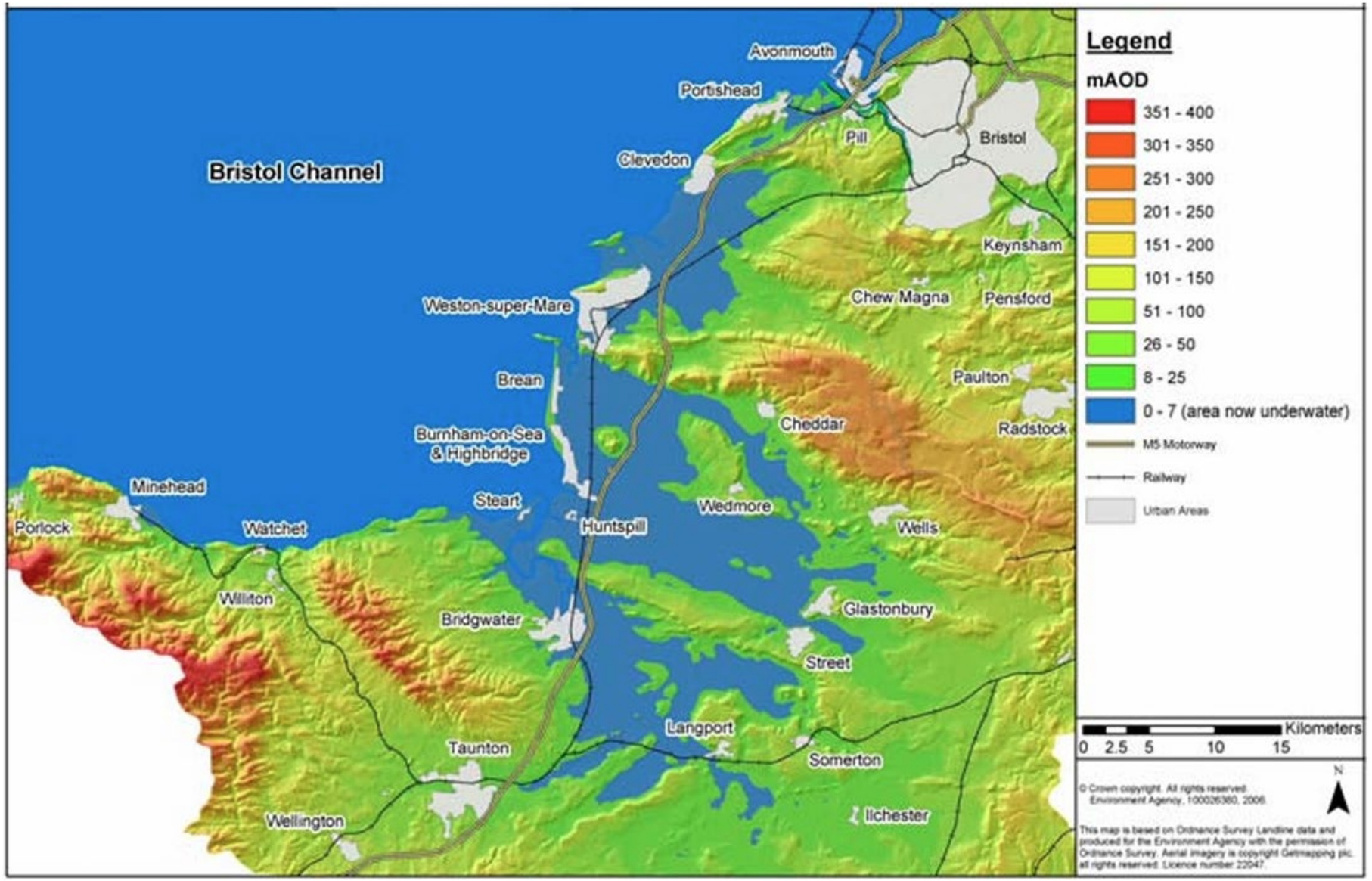
AtkinsRéalis

Protecting **Communities**

Adapting for the **Future**

Enabling **Growth**

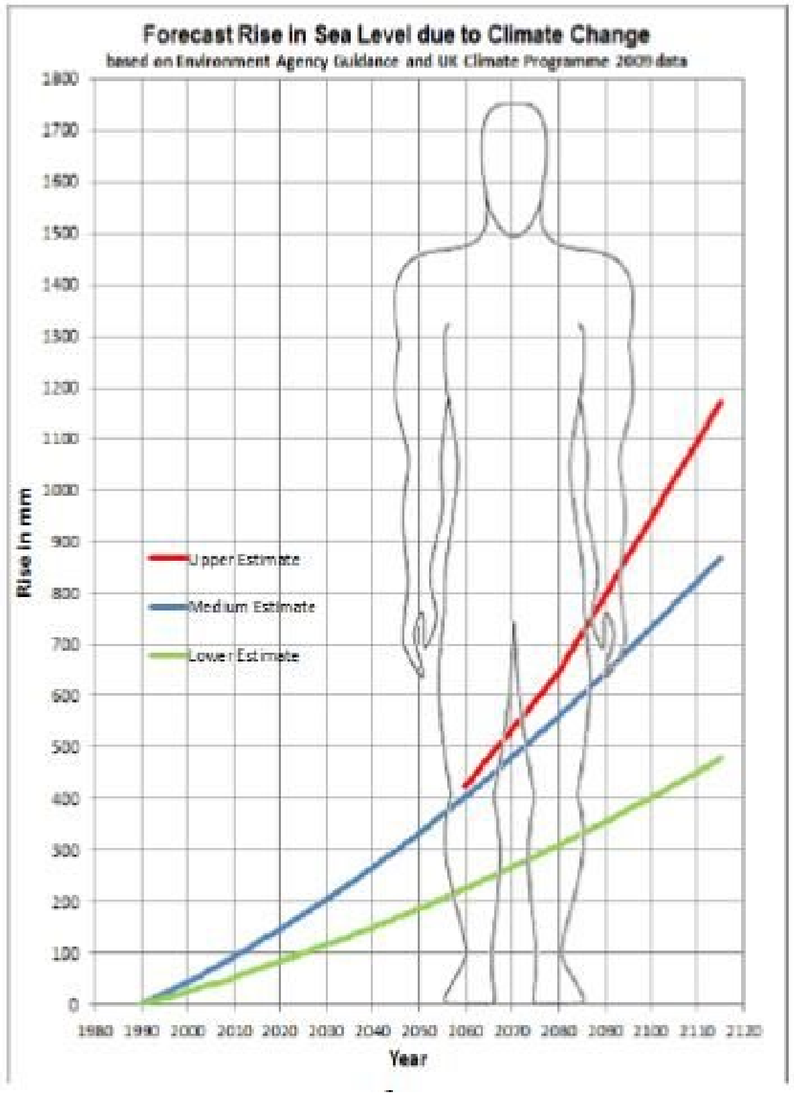
Somerset without coastal flood defences



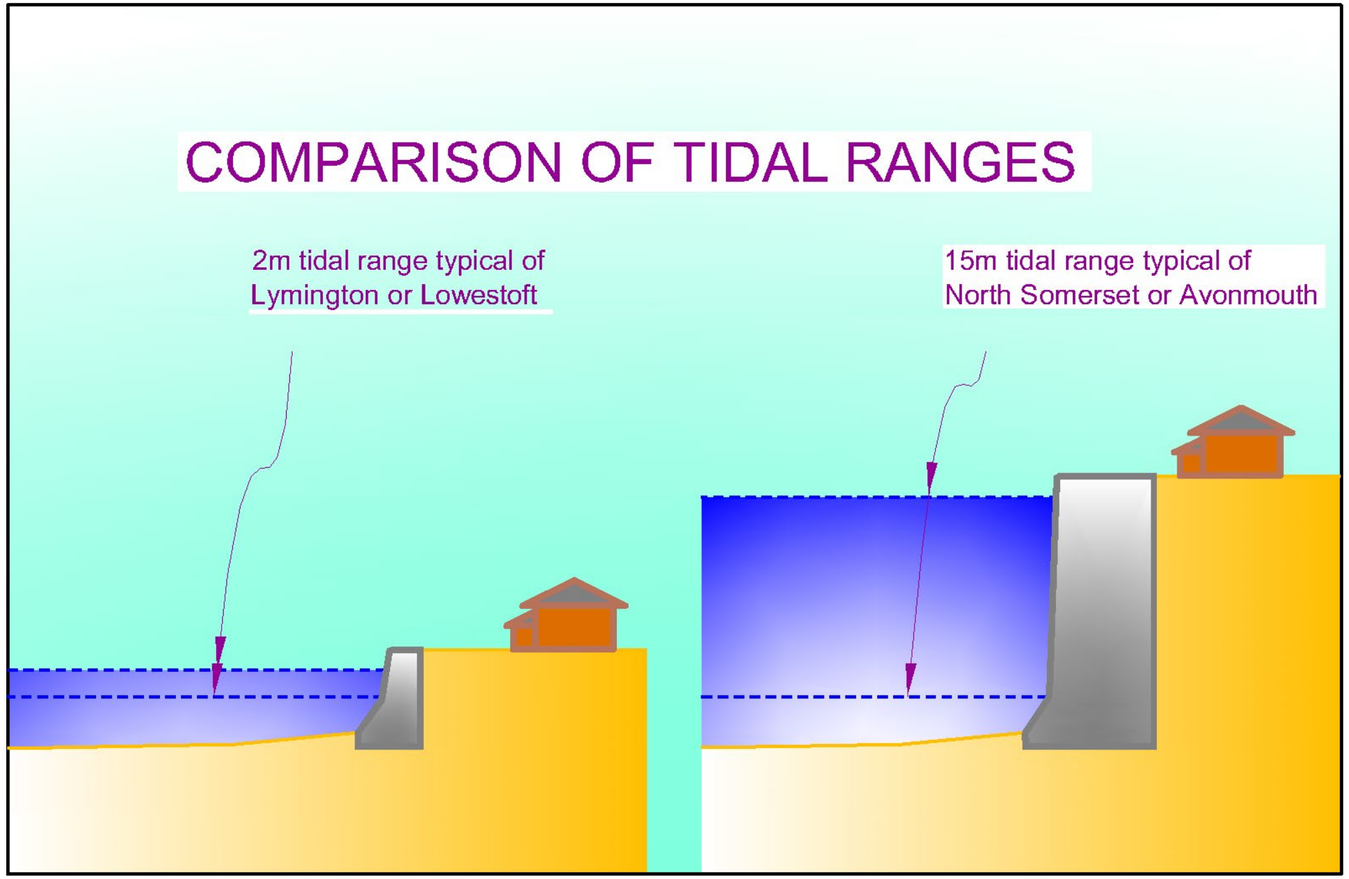
Bridgwater Tidal Barrier Scheme

Protecting **Communities** | *Adapting for the* **Future** | *Enabling* **Growth**

Climate Change – Sea Level Rise



- Bristol Channel has the 2nd highest tidal range in the world.



Bridgwater Tidal Barrier Scheme

Protecting **Communities** | *Adapting for the* **Future** | *Enabling* **Growth**

Scheme Need and Benefits







- The Bridgwater Tidal Barrier Scheme is one of the largest in the country.
- The scheme provides reduced tidal flood risk to 11,300 homes (60% of the town's housing stock) and 1,500 non-residential properties in the town together with key infrastructure.
- It also reduces flood risk to critical infrastructure in Bridgwater including Express Park Business Park, the A38/M5 road corridor and the mainline rail link between the Southwest and Bristol and the North.

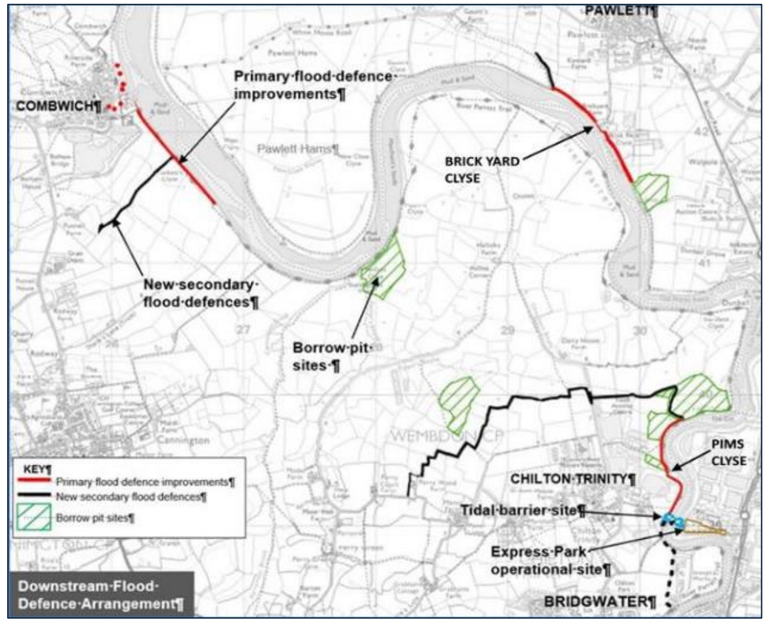
Bridgwater Tidal Barrier Scheme

Scheme Workstreams

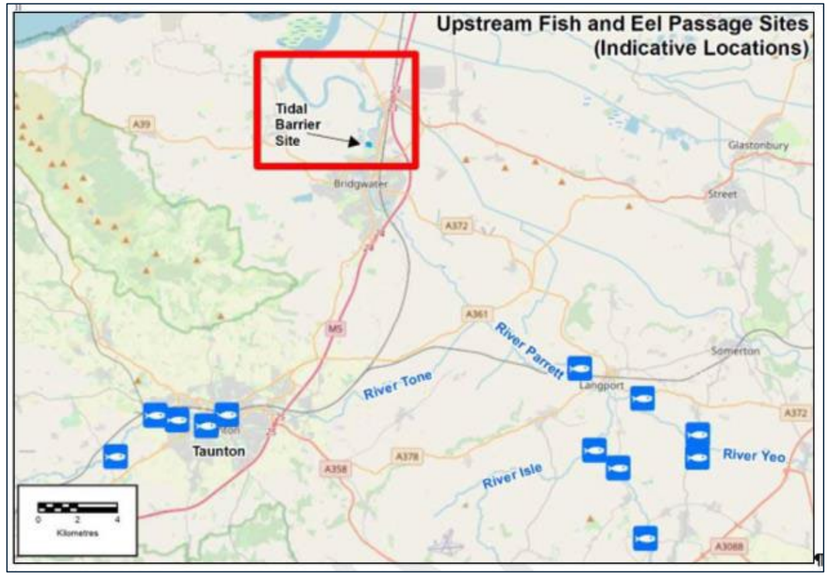
A A Tidal Barrier structure, Operational Buildings and Site, on the River Parrett next to Express Park, Bridgwater.



B Substantial programme of works to improve existing downstream riverside flood banks and construct new secondary flood banks.



C Improved fish and eel passage at 12 upstream sites on both the rivers Parrett and Tone.



Bridgwater Tidal Barrier Scheme

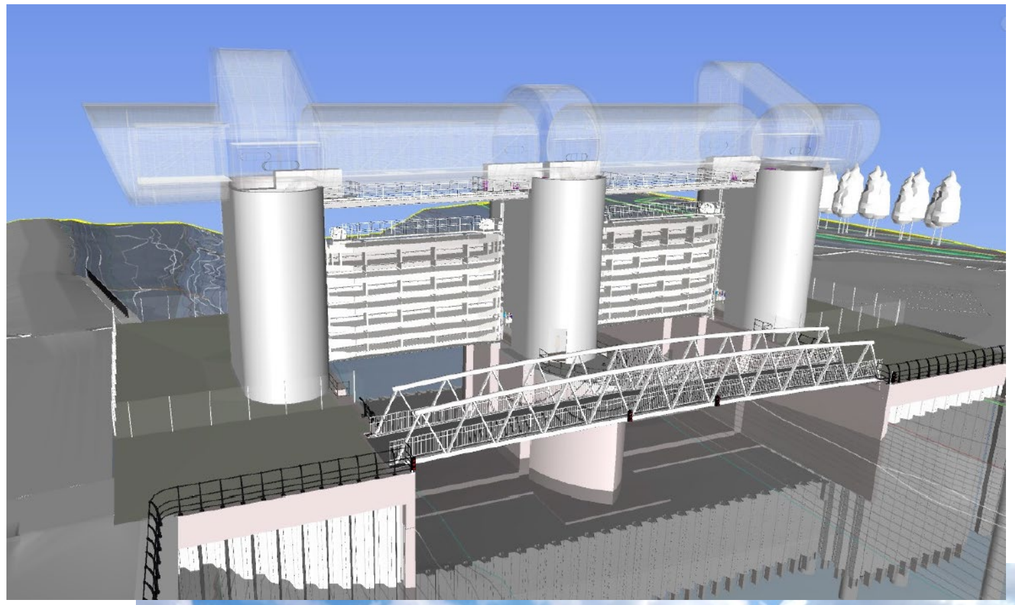
Purpose of the Design Efficiency Review

To ensure the Bridgwater Tidal Barrier Scheme:

- Provides best value for money and responsible use of public funds
- Remains affordable
- Is easier to build, operate and maintain
- Uses the latest technologies and is carbon-efficient



Barrier Design Efficiency Review





What has changed?

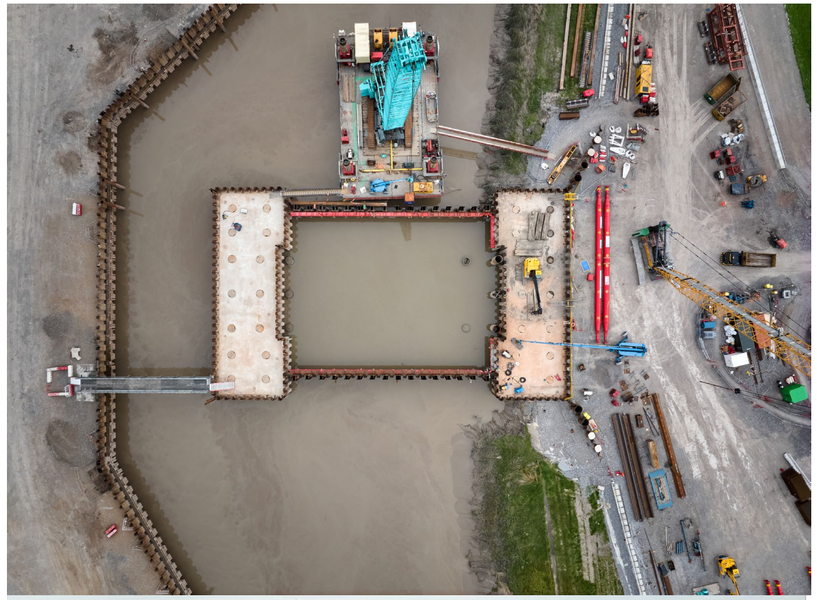
- Reduced tower height (~10m) and better fitting in the landscape
- More functional design - Streamlined, more uniform towers
- Drive equipment relocated to the tower bases for easier maintenance
- A lighter more open operational gantry
- Reduced construction complexity, embodied carbon and long-term running costs

What remains the same?

- Same level of flood protection to 12,800 homes and businesses, at better value
- The substructure and piling requirements
- Retention of the bridge across the river
- Downstream flood defence improvements
- Improvements to fish and eel passage on the Rivers Parrett and Tone

Bridgwater Tidal Barrier Scheme

Barrier construction update



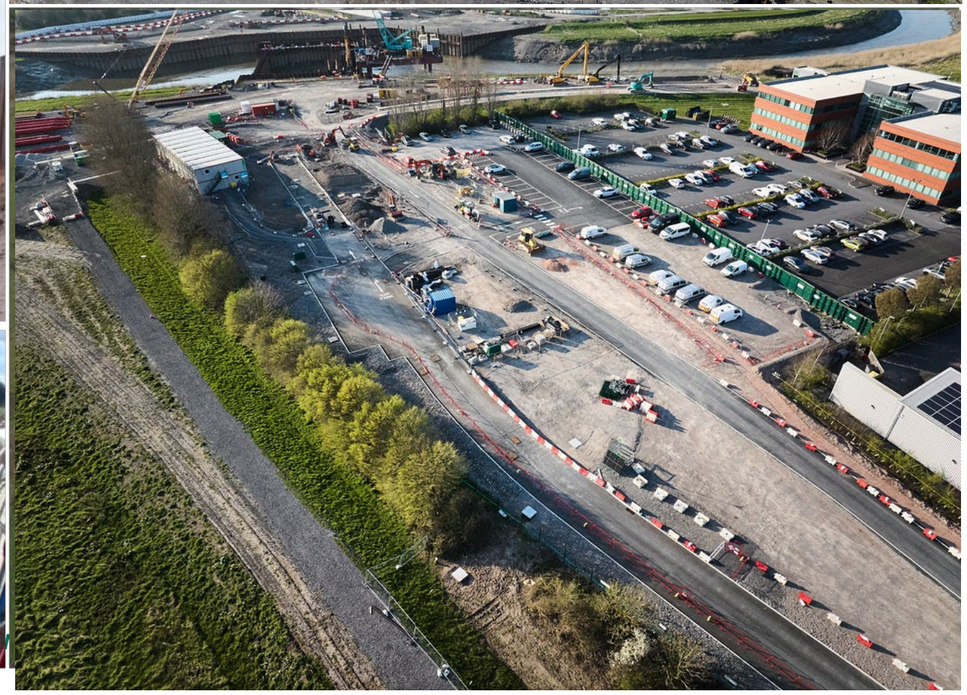




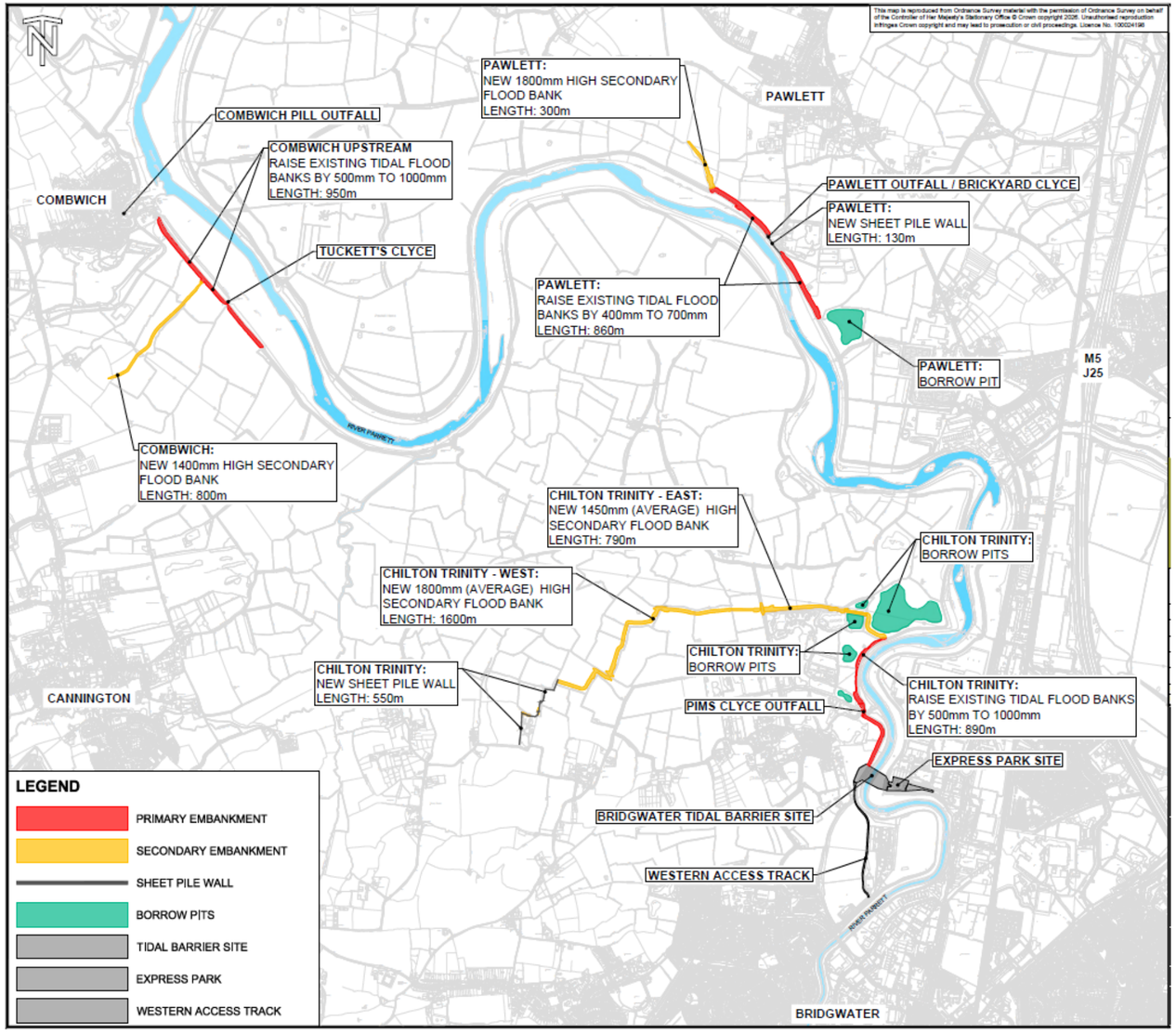








Downstream Defences



- Existing primary bank raising (Red)
- New secondary banks (Yellow)
  - Chilton Trinity
  - Pawlett
  - Combwich
- Borrow pits (Green)

Bridgwater Tidal Barrier Scheme

Protecting **Communities** | *Adapting for the* **Future** | *Enabling* **Growth**

Downstream Defences

Environment Agency | Somerset Council | KIER | AtkinsRéalis







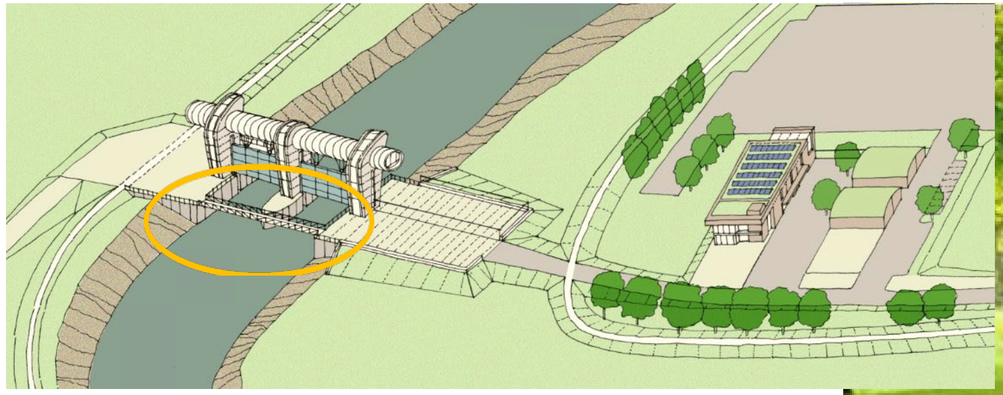


Bridgwater Tidal Barrier Scheme

Protecting **Communities** | *Adapting for the* **Future** | *Enabling* **Growth**

Environmental Enhancements

- Pedestrian / cycle bridge
- Public realm and education
- Increased use of river corridor

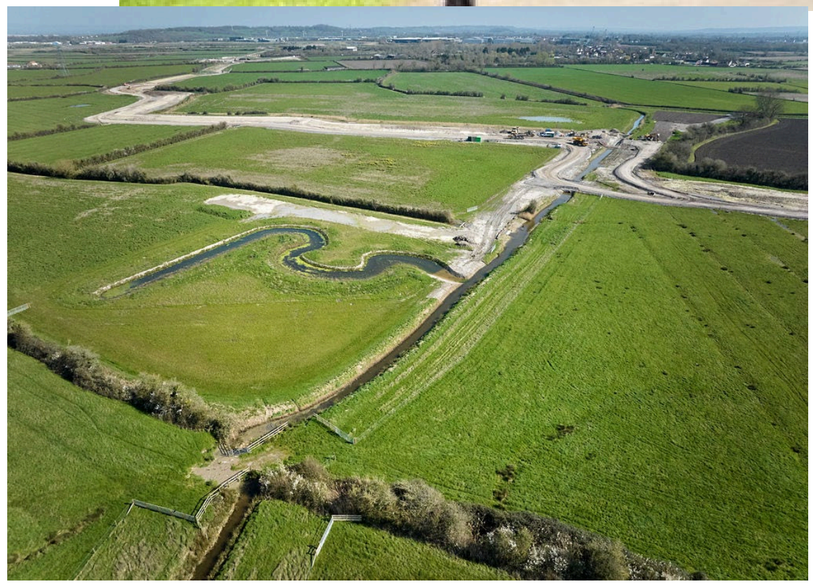




- Wetland habitats through borrow pits



Borrow pit environmental enhancement



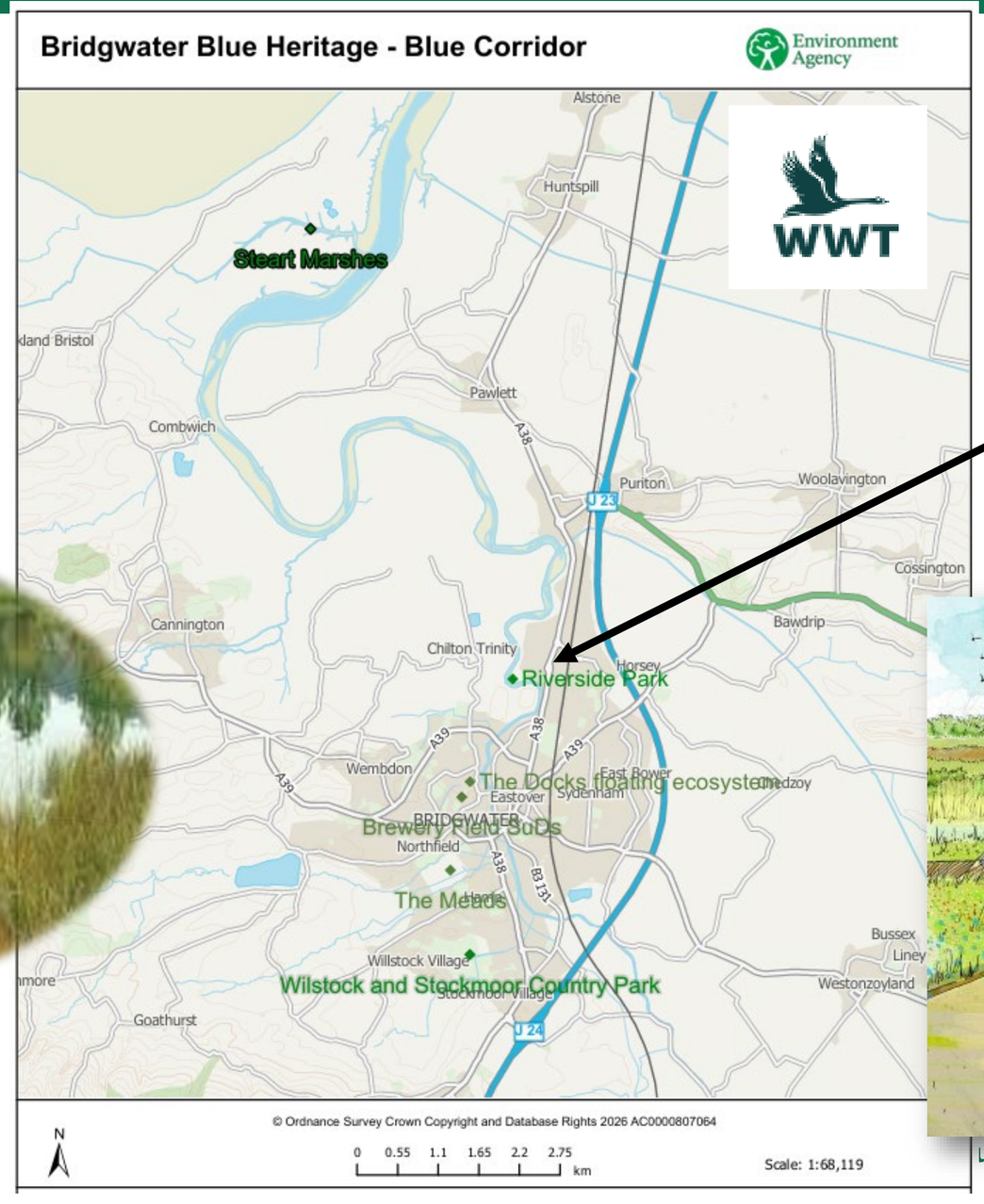
Water vole habitat mitigation

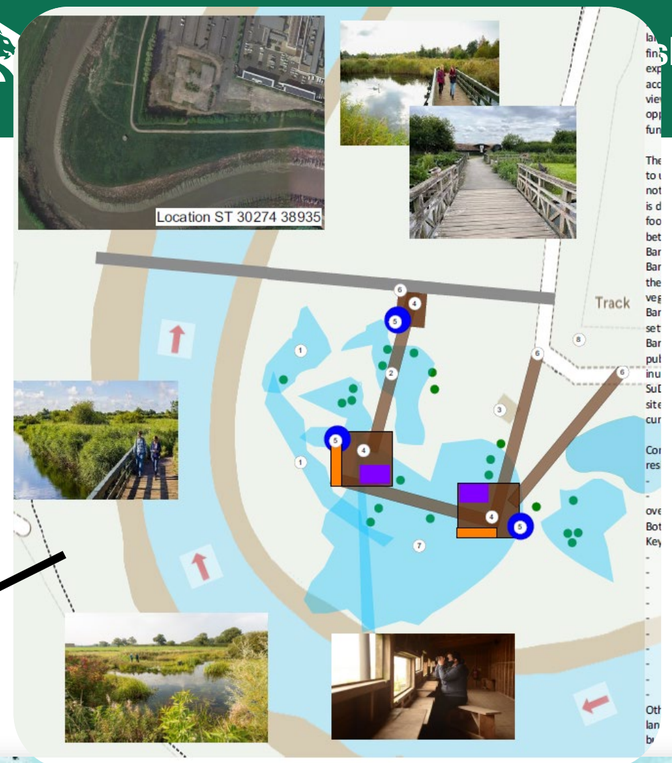
Bridgwater Tidal Barrier Scheme

Environmental Enhancements

- Riverside park concept link with other Bridgwater / Somerset Blue Heritage sites
- River Parrett corridor









Bridgwater Tidal Barrier Scheme

Creating a community resilient to flooding and coastal change

Funded by

Somerset Council

Environment Agency

Wessex Regional Flood & Coastal Committee

heart of the south west local enterprise partnership

Somerset Rivers Authority

Department for Education

HM Government

Planning & outline design – Jacobs

Detailed design – AtkinsRéalis

Construction – KIER

Cost & contract management - ARCADIS

Working with

BRIGEWATER · SIGILLUM · MAJORIS · GALLIOR · ET · BURGENC · VILLE · DE ·

WWT



Parish Council

SOMERSET DRAINAGE BOARDS CONSORTIUM
AXE BRUE, PARRETT & NORTH SOMERSET LEVELS INTERNAL DRAINAGE BOARDS

Outcomes and Partnership Funding



Partnership Funding Contributions	Cash (£m)
Other Government Department funding	24.4
Sedgemoor District Council	2.02
New Somerset Council	13.7
Heart of SW LEP	2.0
EA Local Levy	4.0
Somerset Rivers Authority	1.27
Department for Education	0.8
Affordability Fund	42.86
Total	£91.05m

Bridgwater Tidal Barrier Scheme

Keep up to date with the progress of the Scheme

- Sign up for our newsletter bridgwater.barrier@environment-agency.gov.uk
- Follow us on Facebook – Bridgwater Tidal Barrier
- Check out our website – search Bridgwater Tidal Barrier

Bridgwater Tidal Barrier Scheme

Questions welcome

AtkinsRéalis

Environment Agency

KIER

Somerset Council

SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026

McMillan Theatre, Bridgwater

CLLR MIKE RIGBY

Lead Member - Economic Development
Somerset Council



BILL COTTON

Chief Planning Officer
Somerset Council



Enabling Major Projects in Somerset

Pro-growth attitude

Major projects team

Regulatory co-ordination approach

Local Plan 2045 & Infrastructure Delivery Strategy

Wessex Spatial Development Strategy

Somerset Council

Hinkley Point C



Agratas



Bridgwater Tidal Barrier



Cheddar Reservoir

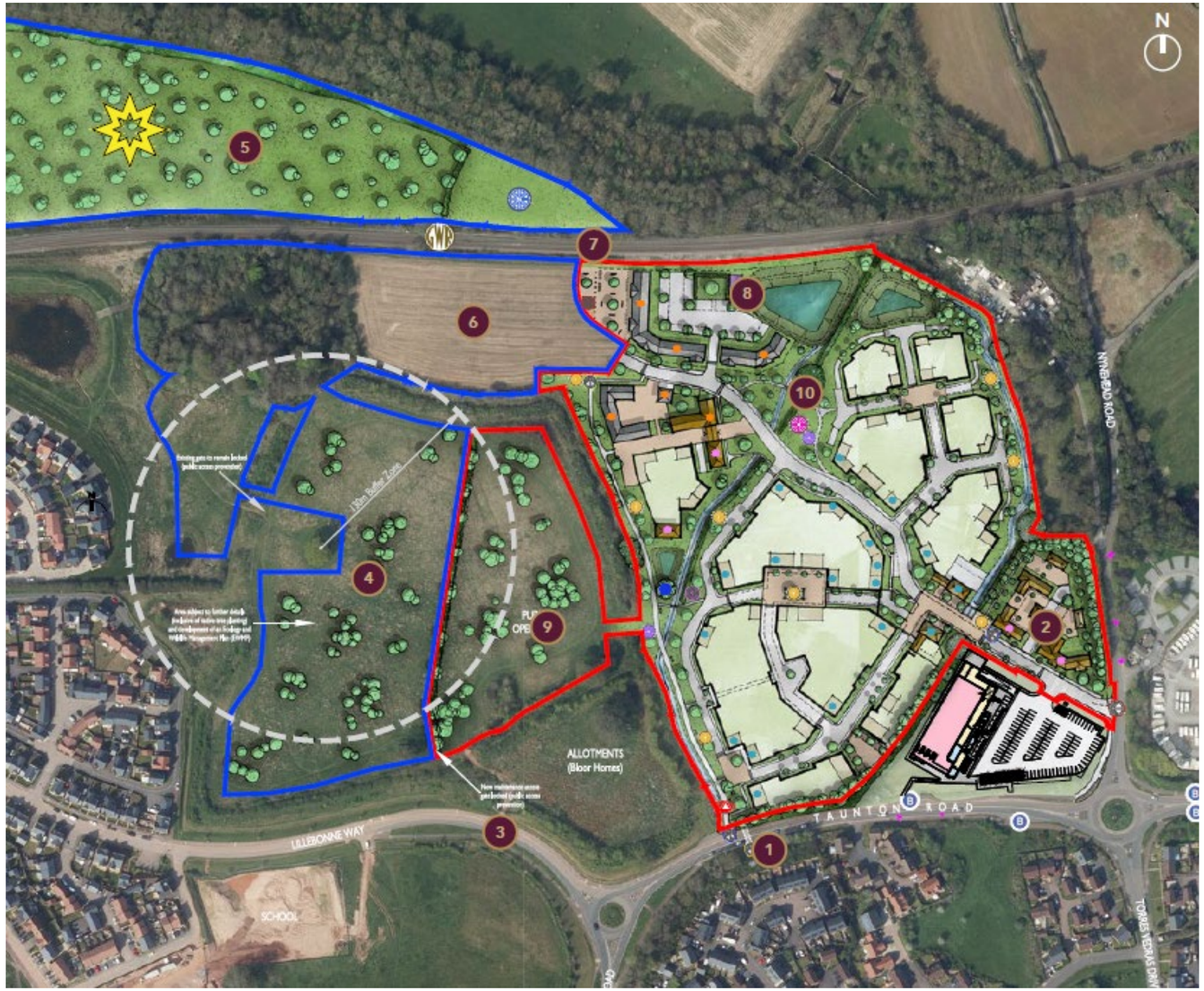


Nexus





Wellington Station





Our Ambition

Enabling growth and development

Supporting Local communities with jobs and opportunities, and

Identifying opportunities and potential barriers early

Somerset Council

SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater



PETER CRONE

Director, Morwind Ltd

Channel Gateway

A Deep Water Clean Energy Manufacturing Hub



Major Projects Conference – Delivering in the South West

18 May 2026

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DEFINING SUSTAINABLE POSITIONS



4



MORWIND

UK Offshore Wind Growth

Offshore Wind represents a significant growth area for UK Energy policy

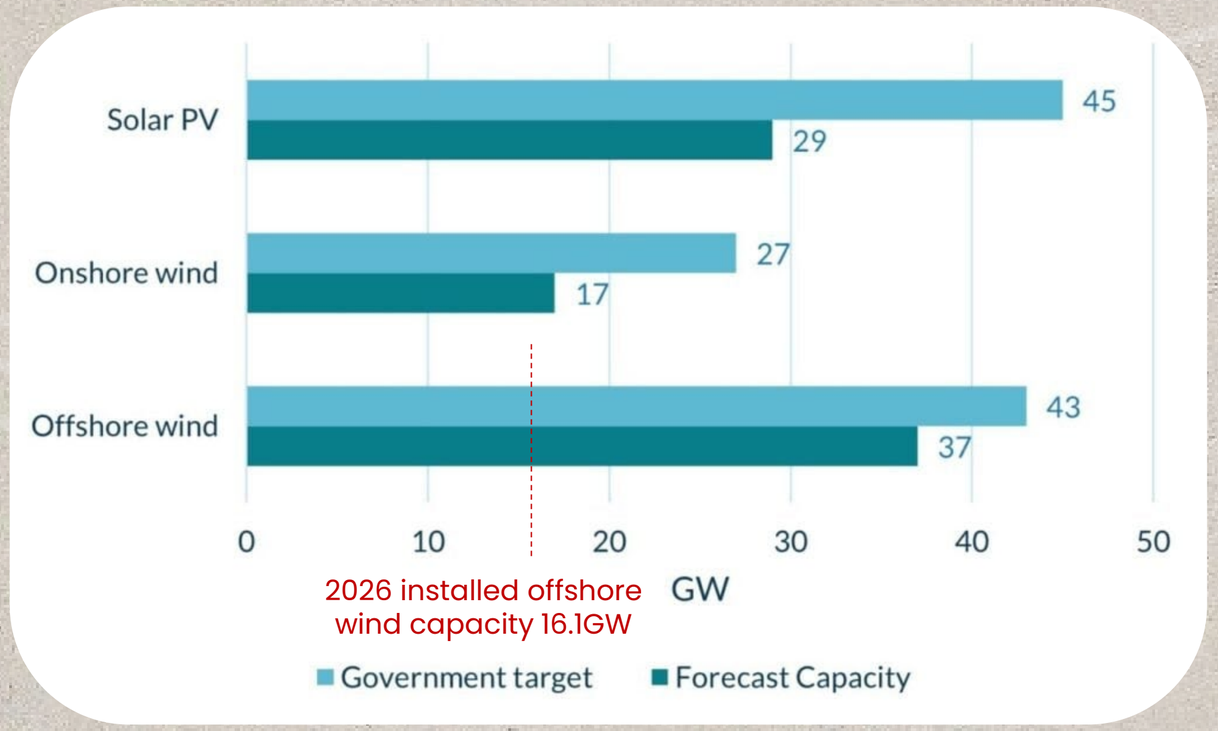
Two distinct offshore regions identified by TCE – the North East and Celtic Sea

Future Celtic Sea potential identified as up to 12GW by 2030-2040

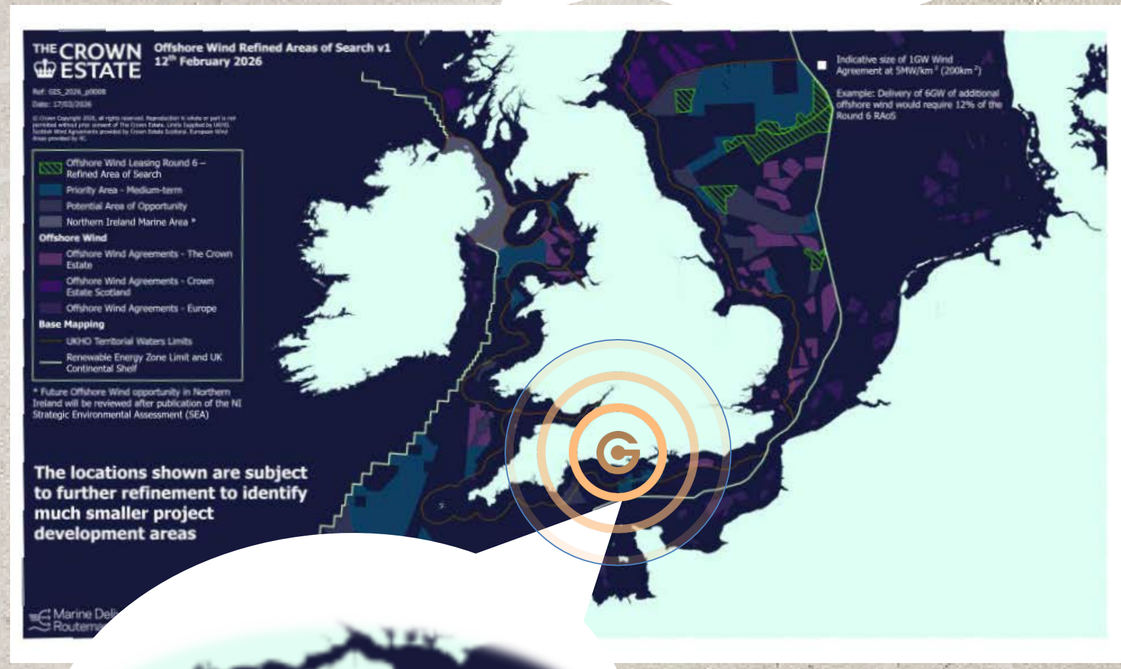
26 March 2026 - TCE announce Offshore Wind Leasing Round 6

6GW in North East

Ports identified as a priority sector
"Development and construction capex for enabling port infrastructure (e.g. Portside manufacturing, laydown facilities & loading upgrades) to support throughput of FLOW Technology"
National Wealth Fund Task Force, July 2024



CP30 - Forecast 2030 installed capacity vs government target
Source: Cornwall Insight.





Inadequate port capacity is a bottleneck

The UK has pledged to reach Net Zero by 2050 – this transition will largely come from offshore wind.

Multiple industry, reports have identified that UK ports are inadequate for future delivery of offshore wind.
Upgraded ports will form the connecting link between UK economic growth and offshore wind energy development.

Ports identified as a priority sector
“Development and construction capex for enabling port infrastructure (e.g. Portside manufacturing, laydown facilities & loading upgrades) to support throughput of FLOW Technology”
National Wealth Fund Task Force, July 2024

"Without... the necessary port infrastructure... offshore wind development in the UK will stall."
Offshore Wind Industrial Growth Plan 2024

"At their current capacity, the UK’s ports are a 'key bottleneck' to progress and urgently need investment."
Wind Europe 2023



MORWIND

Channel Gateway

Addressing the Capability Gap in English Port Infrastructure in the Channel, Celtic Sea and Beyond

Creating the largest bespoke deep-water clean energy and strategic port facility on the south coast for a resilient Dorset, Wessex and UK



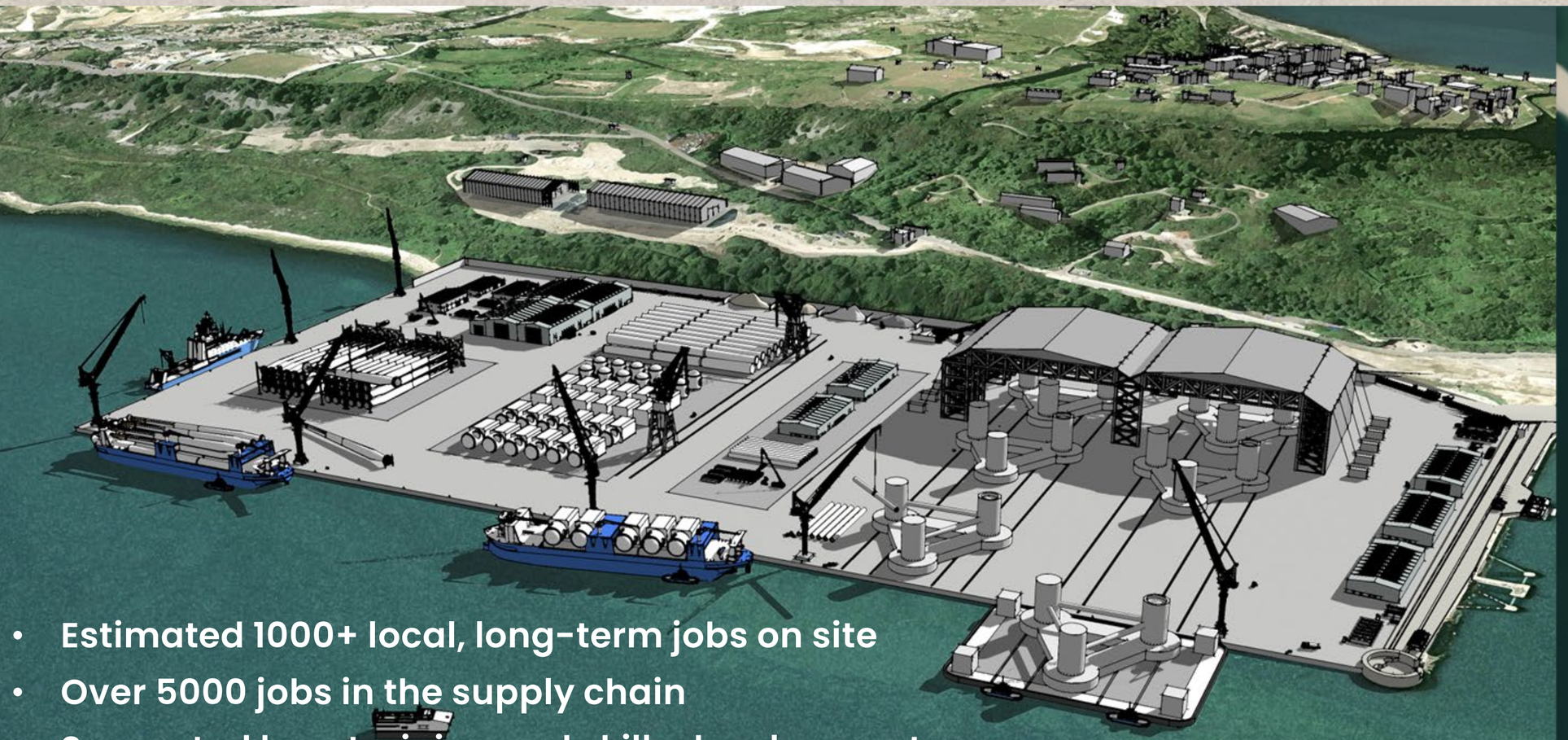
Balaclava Bay, Portland

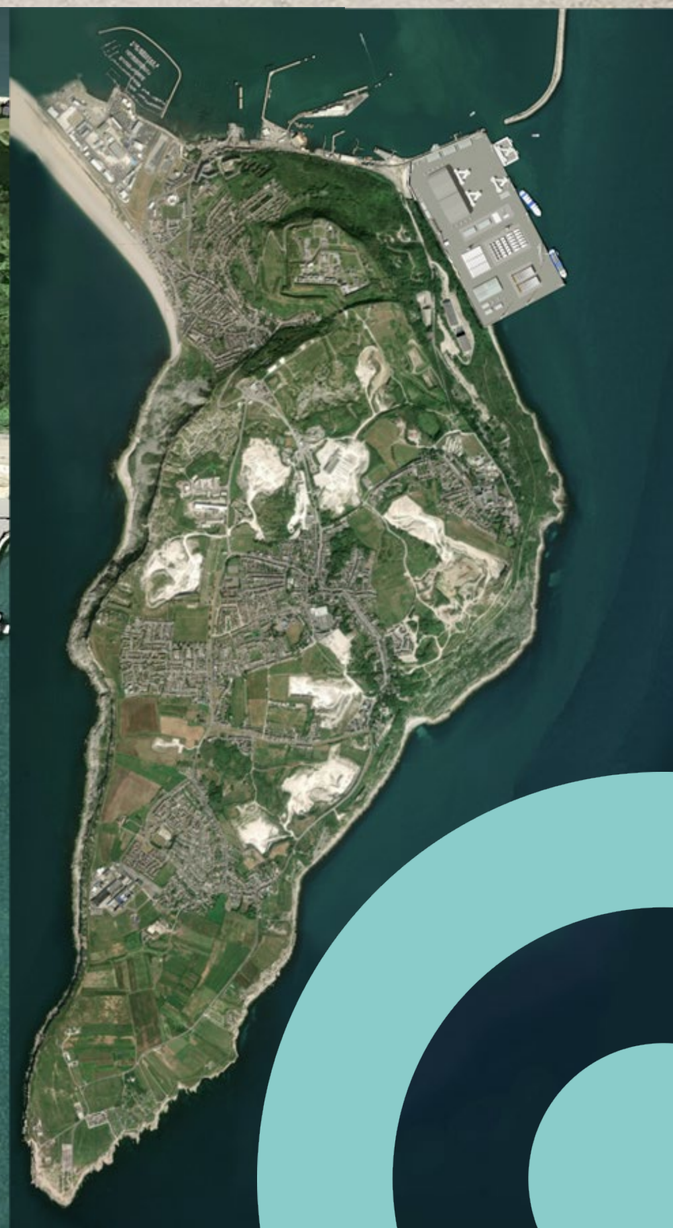
May 2026

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Channel Gateway-Location & Indicative Layout

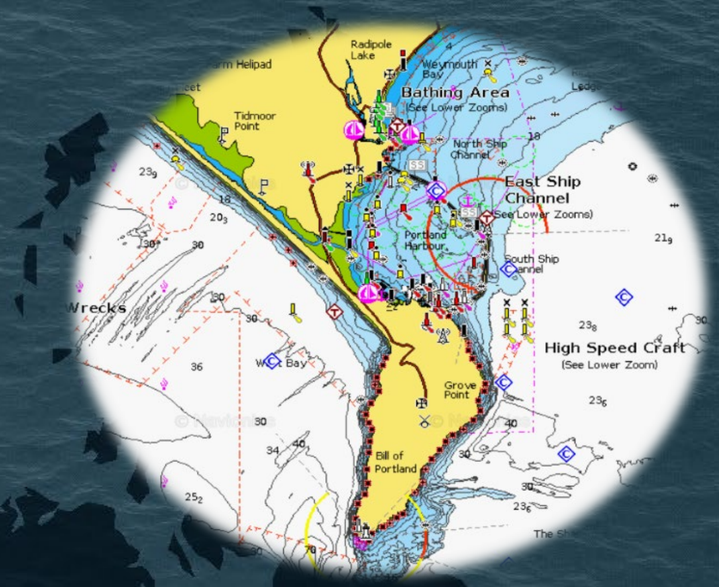
A Strategic Facility and Asset for Dorset, Wessex and UK - maximising the benefit of renewable energy and infrastructure.





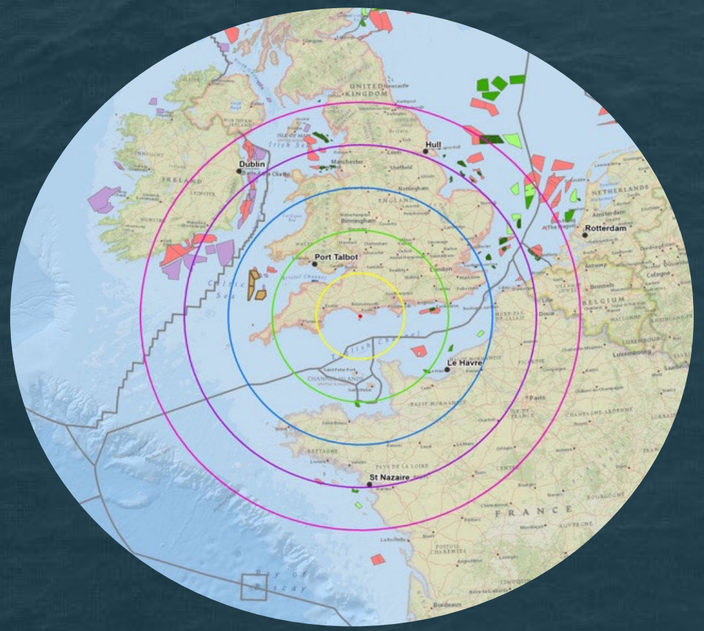
- Estimated 1000+ local, long-term jobs on site
- Over 5000 jobs in the supply chain
- Supported by a training and skills development programme
- Deliverable in around 5 years
- £1.5-2.7bn total GVA benefit for the UK over lifetime
- Marine-facing activities, complements existing port

Strategically Located....



DEVELOPMENT PRINCIPLES

Maximising the benefits of offshore wind for local communities, across the South-West and the UK, whilst decarbonising the supply chain.



1. PROXIMITY

A strategic location midway along the Channel with access to markets lying to the East, South and West.

2. CO-LOCATION WITH AN ESTABLISHED PORT FACILITY

Minimising community and nature disturbance whilst maximising economic opportunity and benefit for the 2030s and beyond.

3. OPERATIONAL FLEXIBILITY

Unrestricted access to a natural sheltered, deep water, microtidal harbour with capability to accommodate the largest offshore wind structures, components and turbines.

Community Offer

Building upon the range of South West strengths, providing a route to the offshore wind industrial market.

Regional impact

Across the Great South West, Channel Gateway provides a hub and catalyst for existing and new businesses to play their part in the offshore wind supply chain.

This iconic new port will provide opportunities for people and skills development and training, as well as opportunities for satellite ports in the southwest, re-balancing regional economic inequalities across the UK.

Economic and jobs benefits

The delivery of the Celtic Sea 4.5GW will create £1.4bn GVA for the economy and more than 5,000 jobs over the next 5 years (*Celtic Sea Blueprint -The Crown Estate 2024*).

A large part of that benefit will be realised local to Portland, with an estimated 1,000+ long-term, well-paid jobs being created, starting with the port construction in 2028. These jobs will include manufacturing, facilities management, construction and port operations – all skills that are transferable from the quarrying, marine and military operations that made Portland strong in the past.



Channel Gateway Development Pathway

Creation of a port facility of national significance

GBP

TCE SCA
1.5m

c.20m

c.500m

3 years

Site Definition

Concept – Scoping – Outline Design – Key Stakeholder Engagement

2026

Feasibility Study

Business case development and updated cost assumptions

THE CROWN ESTATE Supply Chain Accelerator

4 years

Development

Consent, Engineering Studies & Finance. Customer alignment

FID

2 years

Construction

Site reclamation, quay wall and platform construction

COD

Operational 2032

CHANNEL GATEWAY ECOSYSTEM

1

OFFSHORE WIND HUB PORT

Manufacturing, staging, integration and maintenance options

2

FACILITY PHASING, FLEXIBILITY & ADAPTABILITY

Scaling of platform, multi-use and change in use over time

Dorset Clean Energy Super Cluster

3

2GW FIXED WIND FARM OFFSHORE PORTLAND

Expedites supply & local delivery of low-cost wind power

4

LANDFALL FOR OFFSHORE ENERGY

Local grid connection at Chickerell

Channel Gateway-Progress

A Strategic Port Facility and Asset for Dorset, Wessex and UK - maximising the benefit of renewable energy and infrastructure

Supply Chain Accelerator

THE CROWN ESTATE

KPMG

CHANNEL GATEWAY FEASIBILITY STUDY

Haskoning
Enhancing Society Together

Investment Prospectus

Dorset Council

Completion 2026

Entr
Part of Aker Solutions

Site Characterisation, Market Assessment, Design, Business Case,

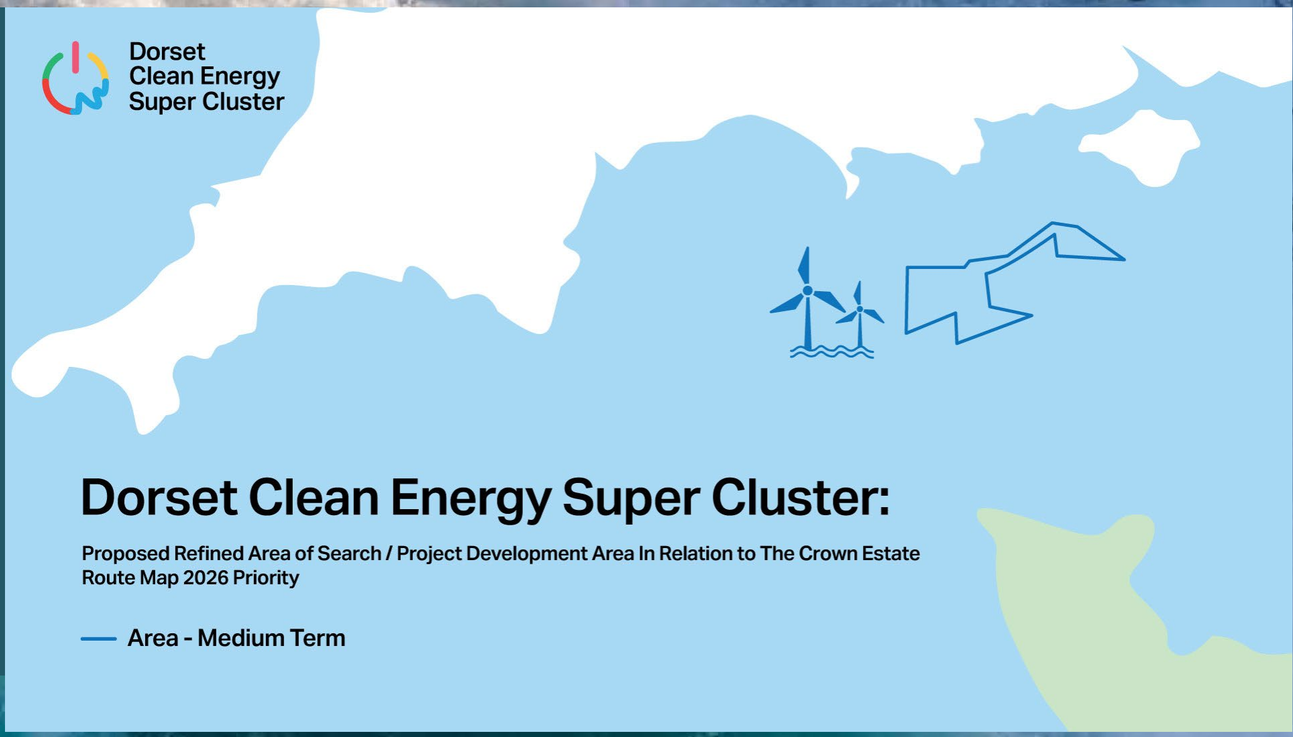
Operations, GVA, Community & Stakeholder Benefits

South of Portland Priority Area

Introducing a 24km ‘cordon sanitaire’ from the sensitive coastlines of Dorset and the Isle of Wight reduces the Priority Area to 500km^2. Allowing for 20% attrition during the EIA process would further reduce the area to 400km^2, which would allow 2GW of offshore wind at 5MW/km^2.

This would provide 6x the annual electricity consumption of Dorset or 3x the total consumption of Dorset together with Bournemouth, Christchurch, and Poole. It would provide 2/3 of the entire 2050 net zero requirement to totally decarbonise the economies of the two local authority areas.

SoP is located in water depths of 35m to 55m. The soil conditions will rule out piled foundations. Steel jackets or concrete gravity bases would be required. CGBs could be manufactured at Channel Gateway.





Near shore, medium water depth, low LCOE, available grid capacity at Chickerel, interconnector to France, high UK content.



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peter@morwind.co.uk

MORWIND

SOUTH WEST BUSINESS COUNCIL
MAJOR PROJECTS CONFERENCE

May 18th 2026
McMillan Theatre, Bridgwater



MATTHEW HINDLE

Head of Net Zero and Sustainability
Wales & West Utilities

Developing a green gas network for the South West



Security Classification: Public

WALES&WEST UTILITIES

Wales & West Utilities Gas Distribution Network

- We own and operate **35,000km** of gas pipelines across Wales and south west England.
- We serve **2.5m** homes and businesses.
- We're proud to provide a secure energy source for customers, achieving **99.7% reliability** in 2024/25.
- Our forecast peak daily demand is 485 GWh, the equivalent of boiling **2.3 billion kettles.**
- Our network can store **52GWh** of natural gas, or the equivalent capacity of around 4 million home storage batteries.
- We invest over **£3m** per week in maintaining the network and making it fit for the future.
- Over **80%** of medium and low pressure network has been replaced with modern, future-proofed pipe.



KEY

- North Wales Local Transmission System
- South Wales Local Transmission System
- South West Local Transmission System

Green gas opportunities in the South West

Biomethane, synthetic methane and hydrogen

Security Classification: Public

WALES&WEST UTILITIES

Green Gas Opportunities

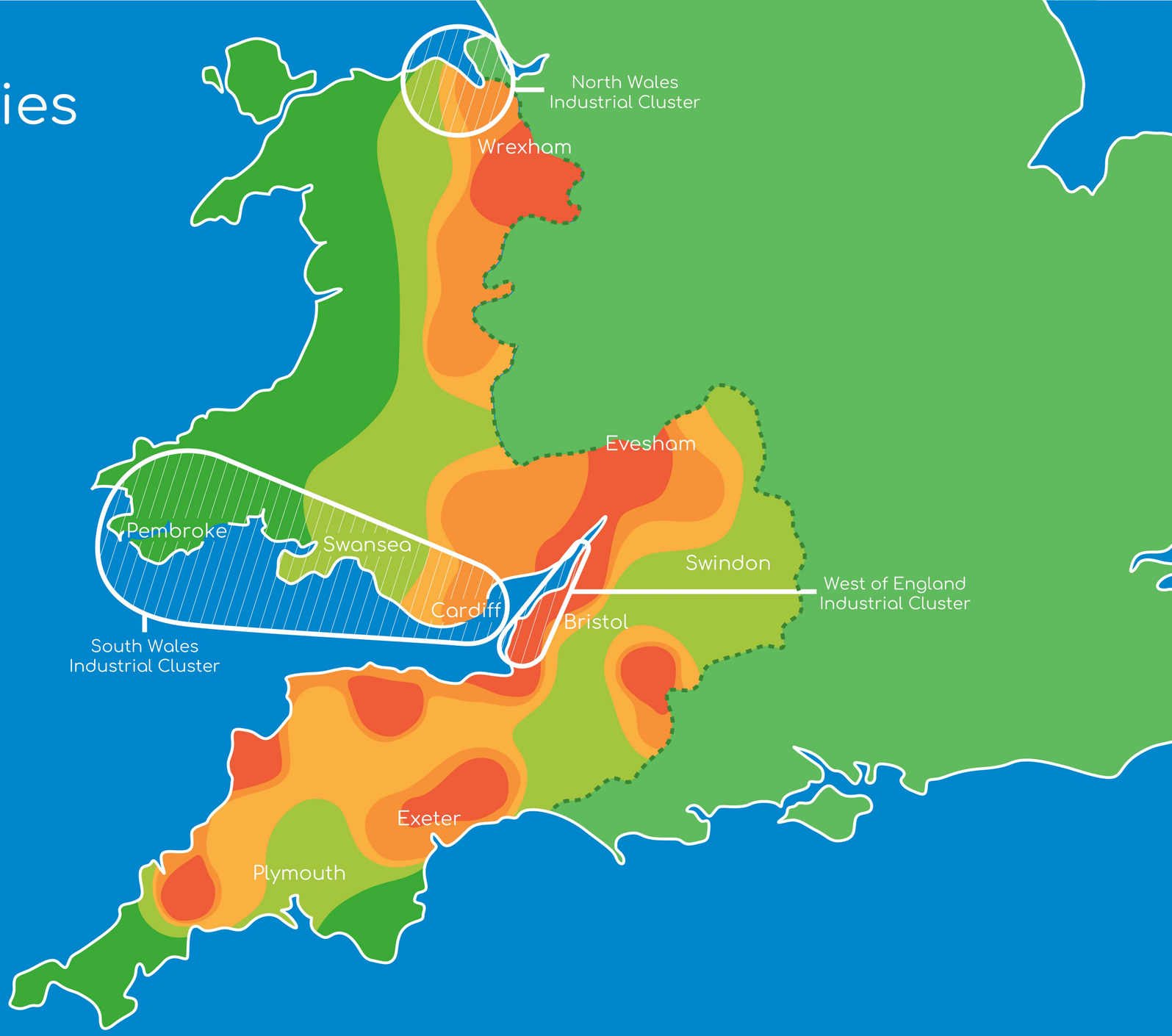
KEY

Biomethane Opportunities

Higher

Lower

Industrial cluster – opportunities for Hydrogen and Carbon Capture



Supporting green gas

Developing connections, capacity and innovation



Increasing capacity for green gas

- **Smart Pressure Control** increases green gas entry capacity through automated control of network pressure
- £565k investment in control systems installed on 9 sites across c. 100 miles; additional capacity could displace natural gas required to heat over 50,000 homes
- Supporting **Reverse Compression** investment for biomethane entry site in Devon
- Ongoing work to assess other capacity options and operation of a grid with high volumes of green gas



Developing new sources of green gas

- Supporting Rivan Industries to connect the UK's first **synthetic methane plant** producing gas from solar power and captured carbon in Wiltshire
- Partnered with hydrogen producer and biomethane plant in Devon to **blending hydrogen with biogas** to increase green gas production and reduce CO_2 scrubbing
- **Rising Pressure Reformer** project in Gloucestershire exploring potential for synthetic gas production from wastes, blending a methane / hydrogen mix into the gas grid

WALES&WEST UTILITIES

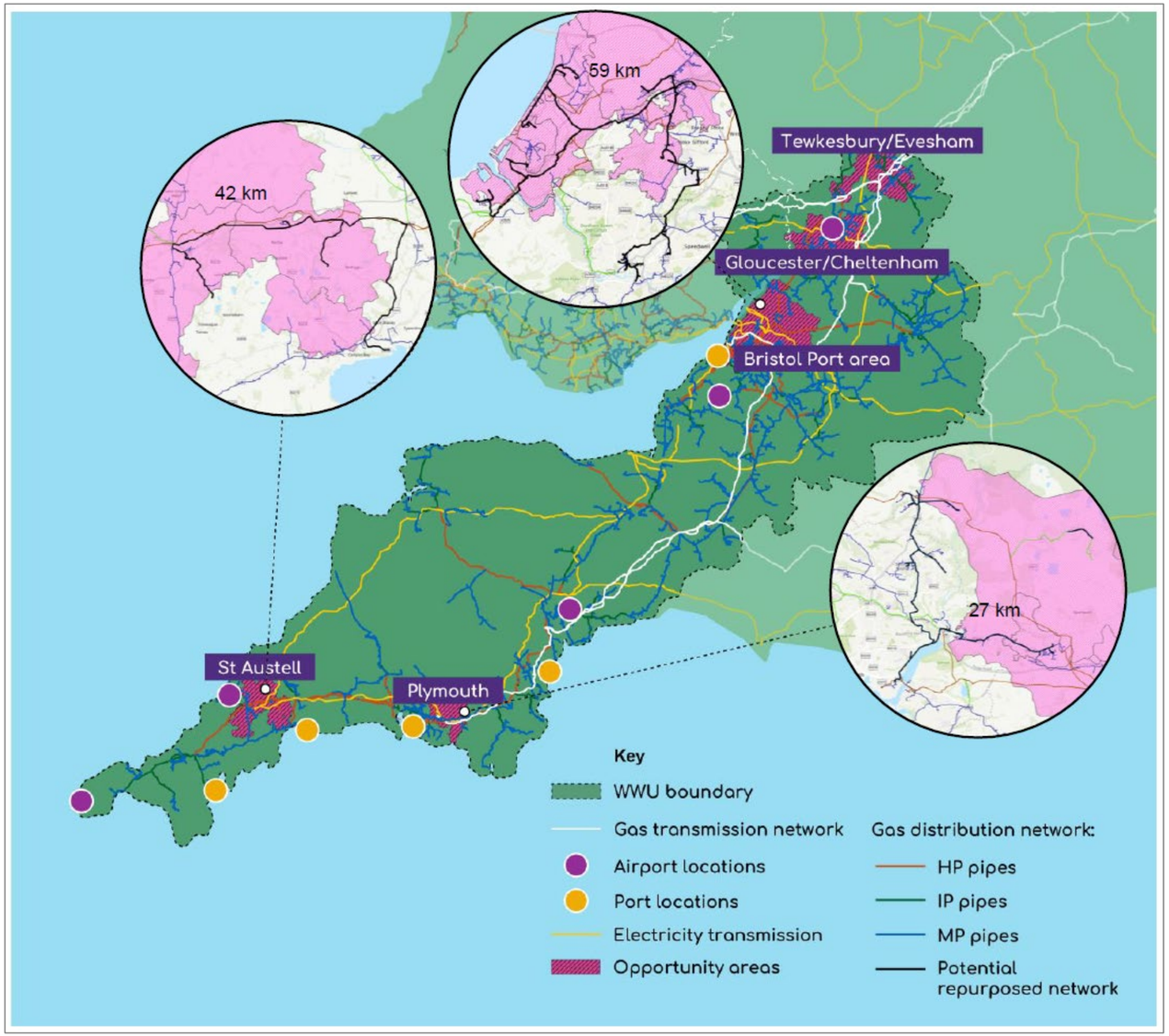
Hyline South West

Developing critical hydrogen infrastructure

Security Classification: Public

WALES&WEST UTILITIES

DASH: Hydrogen opportunity areas in the South West



The South West is likely to have more highly distributed hydrogen production and use compared to other regions.

Opportunity areas identified in the Decentralised Alliance for South West Hydrogen (DASH) included:

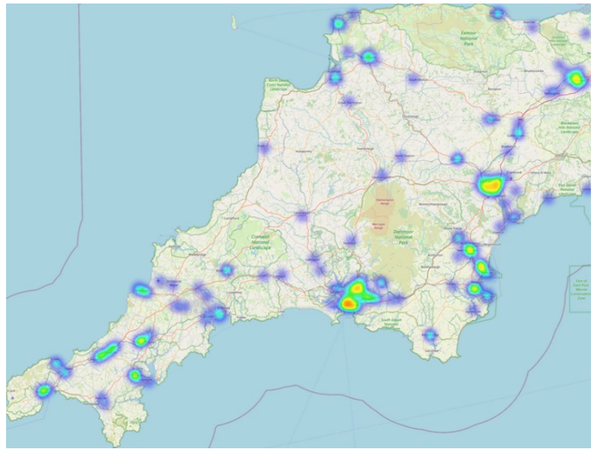
- Portbury, Avonmouth and Severnside with links to diverse local industry through the West of England Industrial Cluster (WEIC)
- Plymouth with links to developing HAR1 projects and existing power generation
- St. Austell industry in particular minerals and mining, including china clay

Hydrogen Supply & Demand Analysis

Strategic Locations

- **Supply**
  - Regional options inc North Devon – Alverdiscott
  - Longer term links to national hydrogen infrastructure
- **Demand**
  - Potential Industrial Users: Power Generation, Minerals, Mining, Ports
  - Likely Demand Areas: Exeter, Plymouth, St Austell/Cornwall
- **Storage**
  - Lined Rock Cavern Potential in Cornwall and Plymouth
  - Potential link to Wessex basin geological storage

Potential Annual Hydrogen Demand	
Scenario	Annual Hydrogen Demand South Cornwall/St Austell & Plymouth & Exeter [GWh/yr]
Electrification	599
Balanced	1176
Hydrogen	1700



Scenario	Seasonal Storage [GWh]	Intraday Storage [GWh]
Electrification	161	0.19
Balanced	317	0.37
Hydrogen	458	0.54

WALES&WEST UTILITIES

Developing Hyline South West

Feasibility output

- Supply, demand and storage assessment
- Two prospective routes

Key Risks & Next Steps

- Hydrogen Strategy and Hydrogen Transport / Storage Business Model timings need to be clarified – especially for mid 2030s commencement
- A pre-FEED study is needed to undertake:
  - Production and offtaker assumptions, aggregation of additional demand (transport, e-fuels, maritime)
  - Repurposing assessment
  - Final route selection, including route corridor to potential Dorset storage
- Strong partnerships with producers, users and supporting organisations are required

WALES&WEST UTILITIES

Energy System Plans

Engaging with the National Energy System Operator to shape developments for the South West

Security Classification: Public

WALES&WEST UTILITIES

Energy System Planning

NESO

Strategic spatial energy plan

Map potential electricity and hydrogen generation and storage infrastructure for GB.

NESO

Centralised strategic network plan

Develop and assess onshore and offshore electricity transmission, onshore gas transmission, and hydrogen infrastructure.

NESO

Regional energy strategic planner

Work across Wales, Scotland and English regions to develop whole system, cross vector regional energy plans at a distribution network level, with input from local actors.

WWU

Long Term Development Statement

Sets out current usage of our pipeline system and likely developments.



KEY

WWU Network

- North Wales Local Transmission System
- South Wales Local Transmission System
- South West Local Transmission System

Regional Energy System Planning Regions

- Wales
- West Midlands
- South West

Thank you

wwutilities.co.uk/about-us/future-of-energy/innovation

Matthew.Hindle@wwutilities.co.uk

Security Classification: Public