DRAFT MARINE INDUSTRY, BUSINESS AND COMMERCE TOPIC AREA PAPER

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GENERAL OVERVIEW

The people of Pembrokeshire, because of their geographical isolation and the difficulties of transportation of produce and goods over land, have depended heavily on the sea for their survival as a source of food, of commercial resources, of communication and most particularly as a means of trade and commerce. Because of this, much of the industrial activity of the county has been centred on coastal areas convenient to trading routes. Traditional goods such as agricultural products, lime, slate, coal and anthracite, fish and shellfish, etc. were traded through, and often processed by, coastal communities. Many small bays and inlets have experienced considerable industrial and trading activity, Porthgain, Porthclais and Abereiddi being just a few examples, but the principal historic trading areas have been at Cardigan, Fishguard / Goodwick and, most importantly, within the Milford Haven Waterway.

One of the largest deep water natural harbours in the world and praised by Shakespeare and Defoe, the Milford Haven was described by Nelson as the only seaport for commerce on the west coast of Britain. The Haven was established as a centre for maritime trade as early as the 13th Century AD and by the end of the 18th Century ships were travelling to the rest of Europe and to America. Pembrokeshire, of necessity, has long had a history of boat building and during the first half of the 19th Century a naval dockyard with a thriving ship building industry, the only one developed in the UK in the 19th Century, grew up in the Haven, giving rise to the development of the town of Pembroke Dock.

Following the decline of the industry in the 1870's, and the closure of the naval dockyard in 1926, large scale industry was largely replaced with small and medium sized manufacturing and processing units predominating. The offshore fishing industry, centred on the docks at Milford Haven, provided a brief period of prosperity for the area during the early 1900's but the commercial fishing industry has now declined dramatically. Equally, mines developed to tap the seams of the South Wales coalfield which ran through the south of the County and provided a high grade anthracite from medieval times until the early 20th Century have now closed as being unprofitable. The slate and lime industries have also ceased to operate.

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WHAT DO WE HAVE IN PEMBROKESHIRE?

Pembrokeshire's Economic and Commercial Position

Pembrokeshire, located as it is on the south-western seaboard of the UK and on a direct route to Ireland, is in a prime position for trading, particularly by sea through its principal ports of Milford Haven, Pembroke Dock and Fishguard. This strategic position is recognised by the European Union through the designation of the A40 and A477 road infrastructure within the County as part of the EU's Trans-European Road Network (TERN), and the designation of the County's key ports of Milford Haven, Pembroke Dock and Fishguard as multi-modal transhipment terminals. The presence of the two ferry terminals at Pembroke Dock and Fishguard, the airport facility at Withybush, Haverfordwest and the rail network link to the rest of Wales and the UK are of vital importance to the County for commerce, communication and to overcome the perception of its peripherality. Road and rail links, although present, are perceived to be inadequate and in need of upgrading. The docks operated in the Milford Haven Waterway by the Milford Haven Port Authority are the fifth largest in the UK in terms of the vessel landings and the freight tonnage. It handles 34.5 million tonnes of freight per annum, much of it to supply the local oil refineries with their raw materials. As some 97% of the UK's trade is through ports, the strategic value of the Docks in the Haven is clear.

Pembrokeshire's economy is fragile, dependent as it is on a narrow economic base of tourism, agriculture, fishing and public sector services. Despite a recent decline, agriculture remains of key importance to the Pembrokeshire economy accounting for around 7,000 jobs in the industry and related farm employment. Agriculture, and hence the County's economy generally, is highly dependent on the maintenance of subsidy payments under the EU's Common Agricultural Policy (CAP). However, the CAP's encouragement of increasing productivity has led to agricultural intensification and aggregation of units with a resulting adverse impact on the environment and biodiversity. Recent reform of the CAP (2003) has moved the emphasis from productivity towards environmental enhancement and protection and it is not clear yet what effect this will have on the flow of CAP subsidy into the County. In order to assist rural businesses hit by the 2001 Foot & Mouth outbreak, the Rural Recovery Action Plan and funding package was introduced and is in place until 2004. Tir Gofal, a WAG / EU funded agri-environment scheme gives financial and advisory support to farmers to enable them to include environmental and heritage protection within their farming activities.
Tourism is Pembrokeshire's largest industry and employer with approximately 9,150 actual jobs (6,672 fte jobs) supported directly or indirectly by visitor spending, or 28% of the total number employed in the County (Pembrokeshire County Council 2001). According to figures prepared by Pembrokeshire County Council for the year 2001, the tourism industry is worth £272 million to the Pembrokeshire economy and visitor spending equates to 20% of the GDP of West Wales. Public sector organisations, e.g. Pembrokeshire County Council, Pembrokeshire Coast National Park Authority and the Health Service are major employees, whilst the energy sector and SMEs in a range of sectors from manufacturing to services, art and craft workshops to retail businesses provide additional valuable jobs.

The fragility of the economy is further exacerbated by the County's perceived peripherality, leakage of its economic and human resource to other areas and a dependency on fluctuating tourism / holiday markets. Pembrokeshire has the second lowest rate of GDP of all Welsh Unitary Authorities at just 66% of the average of EU Members States. With the benchmark rate for eligibility set at 75%, this rate qualifies Pembrokeshire for inclusion within the area designated by the EU for support under the Objective 1 programme. Furthermore, Pembrokeshire has seen the lowest recorded GDP growth in Wales with a figure of just 13.6% recorded during the period 1982 to 1995 compared with growth rates approaching 80% in Torfaen over the same period (Pembrokeshire Economic Framework - Strategy & Vision, March 2000, DTZ Pieda Consulting). This report suggests that this low economic performance is likely to be influenced by Pembrokeshire's :

- Ageing population structure – 32% of all those aged 16+ are over retirement age compared to a level of 25% for Wales as a whole
- Low value added economy – an over-reliance on primary sectors
- Micro – business economy – over 90% of businesses employ less than 10 people

583 sq. km. or 37% of its land area is designated as severely disadvantaged or disadvantaged areas and much of this is within the coastal fringes in the North of the county and in the areas

around Milford Haven and Pembroke Dock (Source : - Farming and Rural Conservation Agency).

Over the past 20 years, the Pembrokeshire economy has undergone massive change with closures in the power, oil and defence sectors, rationalisation in public services, agriculture and fishing and on-going changes in tourism. Over this period, some 3000 jobs have been lost, of which 1000 were in agriculture and fishing, together with a minimum of 2000 indirect jobs. The effect of this restructuring on GDP in the County has been significant. A Cardiff Business School study has estimated that in the decade 1984 – 1994 Pembrokeshire's GDP per head as a percentage of the Wales average fell from 101% to 84%. Between 1994 and 1996 closures at Brawdy, the Pembroke Power Station and the Gulf Oil Refinery will have further exacerbated this situation. More recently, the UK foot and mouth epidemic in 2001caused a sharp reduction in the number of visitors and the use of the ferry services. Whilst there seems to be little if any residual effect from this event, it does demonstrate the vulnerability of the County's economy to external events.

Table 1. Key features of the Pembrokeshire economy in 2002

	Pembrokeshire	**Wales**
Unemployment (workforce Dec. 2002)	5.5%	3.5%
Activity Rates (2000)	71.9%	74.1%
Self employment :		
Male	31.2%	20.1%
Female	16.1%	8.1%
Wages (2002)		
Average female FT	£15,989	£17,943
Average male FT	£18,764	£22,508
Property Prices (Sept. 2002)	£94,608	£83,584
Average property price / average earnings	6.7	4.8
Proportion of VAT registered businesses per 10,000 population (2001)	21.4	20.4
Change in VAT registered businesses (2000/1)	-1.2%	-0.3%
Proportion of population of working age (2001)	54%	57%

Source : - Pembrokeshire Economic Framework – Strategy & Vision, March 2000

Current Business Structure

A number of research investigations have highlighted the fragility of the Pembrokeshire economy and nowhere is this truer than in the coastal areas. These areas are reliant on a very narrow economic base with nearly 50% of all VAT registered businesses in the County being focussed around either primary activities such as agriculture or fishing or the tourist service sector (hotels and restaurants). This compares with less than one third across Wales as a whole. Manufacturing activity in the County at less than 12% of total employment is barely half of the national rate with similarly low levels of financial and business services – long regarded as major growth sectors for established European economies. A useful review and forward look for Pembrokeshire's economy and business framework is provided in the report "Pembrokeshire Economic Framework – Strategy & Vision", March 2000.

A significant feature of the business economy in Pembrokeshire is the high concentration of micro-businesses. Some 83% of all firms have 5 or less employees and a further 9% have only 6-10 staff. Some 10,000 people across the County are self-employed with many people setting up on their own following redundancy from the traditional employers.

Table 2. Industrial Activity of Employer – VAT registered businesses, 1996

Industry	Businesses	% of total	Wales %
Agriculture & Fishing	1870	39	23.4
Mining; Energy/Water	5	0.1	0.2
Manufacturing	195	4.1	7.6
Construction	490	10.2	11.7
Wholesale & Retail	970	20.2	24.5
Hotels & Restaurants	495	10.3	8.5
Transport & Communications	125	2.6	4.4
Financial Services	5	0.1	0.4
Real Estate and Business Services	325	6.8	11.4
Public Admin. ; Other Services incl. Culture	260	5.4	6.4
Education & Health	50	1	1.5
Total	4790	100	100

Source : West Wales TEC/Nomis from Pembrokeshire Economic Framework, March 2000

After allowing for Pembrokeshire's demographic age profile, economic activity among the key working age group of 25-49 is highly favourable compared to the national average as are the basic skill levels. However, unemployment rates in Pembrokeshire remain consistently above national levels. There is also a clear pattern of seasonal increase in unemployment through the autumn and winter months reflecting the patterns of demand of the tourism and agriculture sectors. A high incidence of short term contracts is also a feature of the employment market. This overall picture is exacerbated by pockets of severe local difficulty. It is significant that these areas are, in general, located in the coastal areas as highlighted in the following table.

Table 3. Claimant Unemployment by Area – June 2000

Job Centre Areas	Male %	Female %	Total%
Fishguard	14.4	4.5	9.6
Haverfordwest	9.3	2.8	6
Milford Haven	20.2	10.8	16.7
Pembroke Dock	13.4	6.7	11.2
Tenby	12.1	3.3	7.4
Pembrokeshire	**12.9**	**4.2**	**8.7**
Wales	**7.5**	**2.4**	**5.1**

(Source - "Pembrokeshire Economic Framework – Strategy & Vision", March 2000, DTZ Pieda Consulting.)

The principal challenges for the County in terms of economic growth and business development are 3 fold and may be summarised as: -

1. to find opportunities for business development which will create new job opportunities, generate economic growth and broaden the County's employment base which are compatible with and give added value to the County's environmental and social character
2. to attract inward investment to generate business development in line with (1) above
3. to support and encourage existing businesses in the County to expand and develop in line with (1) above

A detailed review of the current situation and proposals for future development within Pembrokeshire are set out in 130 policies in the Pembrokeshire County Council / Pembrokeshire Coast National Park Authority Joint Unitary Development Plan for Pembrokeshire 2000 – 2016 published in February 2002. This document replaces the previous Dyfed Structure Plan and the three Local Plans (the North and South Pembrokeshire Local Plans and the Pembrokeshire Coast National Park Local Plan) which preceded it. A key Objective of the Plan is " To address Pembrokeshire's low per capita Gross Domestic Product by stimulating economic growth through attracting inward investors, meeting the needs of local industry and diversifying the rural economy".

Current Initiatives and Business Opportunities

The Local Planning Authorities, Pembrokeshire County Council and the Pembrokeshire Coast National Park Authority, have responsibility for establishing and delivering a strategic approach to economic and business development in the County and this is to be achieved through the Joint Unitary Development Plan 2000 - 2016. This document provides the current framework for land use planning decisions and guides new development to appropriate sites.

The Development Strategy set out in the Plan makes the following points relevant to the coastal zone : -

1. The preferred locations for development are within the main settlements, particularly where this involves the re-use of appropriate brownfield sites.

2. The main focus for development will be the main settlements on an 'economic corridor' along the line of the A40/A477 road and rail network to the ports on the Haven Waterway and the Irish Sea.
3. The attraction of inward investment is needed to create employment and stimulate economic growth. Local businesses also need the opportunity to expand. Sites for such development and expansion will be provided at Haverfordwest, Milford Haven (Esso site) Pembroke Dock, Narberth and Fishguard.
4. There is only limited capacity for further development to take place within the National Park.
5. The Plan seeks to guide development to locations that will minimise the need to travel or which are accessible to public transport.
6. Development and diversification of the economy of rural areas, e.g. agricultural businesses, will be encouraged, particularly through the appropriate re-use of buildings for new uses.

In summary, the principal areas for business development and therefore employment generation in the future will be within existing areas of development, on 'brownfield' sites or within the A40 / A477 corridors, with development within the National Park area extremely limited. This will effectively exclude all but a few areas of the coastal zone from development of significant employment opportunities through new manufacturing or processing businesses. In addition, the ability of many business sectors to continue and/or develop within the coastal zone is likely to be further restricted with the implementation of the conservation area designations introduced under the EC 'Habitats' and 'Birds' Directives. As a result, development or retention of jobs in most coastal areas will need to be through the expansion or diversification of the existing traditional sectors of tourism, hospitality, arts and crafts, agriculture and fishing. Access to other job opportunities will need to be through commuting to development areas or through emigration out of the coastal areas.

The Objective 1 Local Strategy for Pembrokeshire prepared by the Pembrokeshire Partnership Management Board sets out targets and immediate priorities based on 5 Strategic Objectives, namely: - Developing vibrant communities; improving communication links to, from and within the County; Delivering economic growth based on local need; Encouraging people to reach their potential; and Promoting a clean, healthy and valued environment.

A number of opportunities for business and economic development exist in the County both within and without the coastal zone. All of them are likely to have a positive impact on the economic and social prosperity of the County as a whole, including coastal areas and many of them are receiving support from or are eligible for support through the Objective 1 structural funds and other funding programmes.

Amongst the traditional, core business activities, local entrepreneurs are recognising the increasing demand for short break eco-tourism and outdoor activity related holidays, sectors that Pembrokeshire is particularly suited to cater for. In response to market and economic trends in recent years, the agriculture sector in Pembrokeshire has turned increasingly to (i). creating processing and marketing co-operative enterprises to add value to its primary products and to cut costs, and (ii). diversifying its business activities outside of its core agricultural base. The commercial inshore fishing sector is recognising the need to follow suit and to develop the opportunities for job creation and greater economic benefit which can result. Both the agriculture and fishing sectors can have a part to play in meeting the specialist needs of the tourism sector.

Further opportunities which would potentially provide a major boost to the local economy and job market include the following : -

- The further expansion of the activities and business potential of the Withybush airfield at Haverfordwest
- Creating improved links with continental and Irish markets by air and sea will do much to overcome the perception of peripherality from which the County suffers
- The development of business opportunities at the old Trecwn MoD site which already has a rail link
- The proposal by Petroplus International BV to re-develop a part of its site at Waterston, Milford Haven to create a terminal for the importation and storage of Liquefied Natural Gas (LNG)
- Moves by the Milford Haven Port Authority to develop the Haven as a port of call for visiting cruise liners
- Aquaculture is a growth area with considerable potential, particularly in the developing field of land-based, closed circuit re-circulation systems. Such systems overcome the environmental and visual intrusion problems associated with conventional cage and pond/raceway systems through the maintenance of very high water quality standards and very low water throughput levels. Suitable species for culture include cod, bass, turbot, sturgeon, abalone, and other high value / high demand species but markets are global and can easily become depressed through world-wide over-production. Mariculture, the rearing of shellfish on a semi-intensive basis in the wild, also has tremendous potential in Pembrokeshire if the environmental objections can be overcome.
- Pembrokeshire is ideally located to host businesses related to renewable energy generation and fossil fuel exploitation. Wave, tidal and wind power generation presents a particular opportunity given the County's abundance of wind and water and its 'green' image.
- The Fishguard and North Pembrokeshire Regeneration Plan, a plan prepared by the Welsh Assembly Government, Pembrokeshire County Council and "Team Wales" agencies in consultation with local businesses and communities, has identified proposals for community and employment regeneration, principally in the Fishguard / Goodwick area following the loss of locally important employment e.g. the closure of Dewhirst's factory in Goodwick. A key element of the regeneration package is the provision of a 400+ berth Marina at Goodwick with capacity for 20 fishing vessels, a fishermen's quay and small business units associated with the development to meet new and existing business needs.
- A further development proposal to include a marina is planned for Pembroke Dock. The Front Street development stretching from the Martello Tower to the Celtic Sea Jetty and incorporating the Western Way car park proposes a 400 – 500 boat marina behind a sea wall which would transform the area into a modern harbourside development with attractive housing and apartments with business development possibilities. This development, in association with the Goodwick proposal and other marinas around the Welsh coast, would form a chain of suitable berthing and mooring facilities to cater for the growing recreational private cruising sector as well as providing facilities for visiting cruise liners, both of which have potential for creating business opportunities for local communities.

It is important to recognise that the implementation of any such development activity would need to be in harmony with the environment and the needs of existing businesses and communities.

How does Marine Industry, Business and Commerce affect the coastal zone in Pembrokeshire?

With the exception of the successful port and ferry businesses in the County, the truly 'marine' traditional industries in Pembrokeshire such as fishing, boat building, boat repair, chandlery manufacture and retail and mariculture no longer play a major part in the County's economy. They do remain significant, however, largely because of the expanding and changing demands of the tourist industry which is of such importance to the County and which is to a large extent centred on the coast. Increasing interest by visitors (and residents) in marine-based activities, high quality local produce in hotels and restaurants and the wild scenery and wildlife of the County, together with the development of marinas and water based activity centres locally all provide job opportunities and income for coastal communities. These very demands and activities, however, all impact on the quality and diversity of the wild environment and careful monitoring and management are required if the right balance is to be maintained. The importance of doing so is exemplified by the statistic that the annual value of the Coast Path in generating income to local communities is 57 times the annual cost of managing it.

The maintenance of the attractiveness and quality of the coastal environment is dependent on ensuring that development within it is compatible and appropriate. This is reflected in the PCC / PCNPA planning and spatial development policies which require that any development, including industrial and commercial, should be restricted to existing development sites, 'brownfield' sites and inland sites adjacent to the main transport links. This clearly reduces the scope for business development within much of the coastal zone and increases the necessity for coastal communities to diversify existing business activities, commute or migrate permanently or temporarily to other areas of employment.

Existing coastal and coast-related industrial activity carries an element of risk of causing environmental damage and hence impacting on the marketability of the area as a tourist destination. The "Sea Empress" incident was an extreme case, but the chronic effects of industrial and agricultural pollution, discharges and litter from tankers and other vessels, environmental degradation by the aggregate and fishing industries and the competition for space and resources between man and nature are insidious issues which must be tackled. It should be noted that much of the activity which results in the risk / damage is remote from the coastal fringe itself.

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HOW IS IT MANAGED?

Whilst the Welsh Assembly Government has an overarching responsibility for sustainable economic and business development in Wales, this needs to be considered within the context of, and guided by, EU policy and legislation. Successive Treaties (Single European Act, Maastricht and Amsterdam Treaties) have led to the territorially significant sectoral policies of the EU. Particular significance is attached to the Structural Funds, the Trans-European Networks and environmental policy since they have the most direct effects upon development activities in Pembrokeshire. The Trans-European Network (TEN), which arose from the Maastricht Treaty, obliges the UK and other Member States to contribute to the organisation and development of the Network in the areas of Transport, telecommunications and energy supply infrastructure. TEN-transport measures are the most relevant to Pembrokeshire in spatial development policy and in financial terms as the Transport TEN runs through the County. In addition to these, the European Spatial Development Perspective (ESDP) approved in 1999 provides a European context for the preparation of UK and Regional policy. Sector specific policy EU frameworks dictate the direction and management of agriculture and fishing, namely, the Common Agriculture Policy which, in addition, supports the industry through extensive subsidy payments and the Common Fisheries Policy, respectively. No subsidy support is available to the fishing industry except through decommissioning schemes, which pay for removal of certain vessels from the fleet to reduce fleet capacity.

The Government of Wales Act 1998, Section 121, states that the Assembly must develop a scheme for sustainable development which should be consulted on and reviewed every 4 years. Arising from this, the Assembly has produced a number of strategy documents, Action Plans and initiatives through which it seeks to influence the speed and direction of business and economic development in Wales. These include the National Economic Development Strategy document, "*A Winning Wales*", January 2002; the Implementation Plan for Entrepreneurship : *Making It Happen*, 2002; the Rural Development Plan for Wales, 2000 – 2006; Planning Guidance (Wales) Planning Policy, April 1999; Cymru Ar Lein and the Broadband Wales Action Plan; Innovation Action Plan; Business and Environment Action Plan; Partnership At Work; Farming for the Future; and the Priorities of the European Structural Funds Programmes.

Assistance for existing and new businesses is available through the Welsh Assembly Government (WAG), Welsh Development Agency (WDA), Pembrokeshire County Council (PCC), Pembrokeshire Local Action Network for Enterprise and Development (PLANED), Pembrokeshire Business Initiative (PBI), Opportunity Wales, Pembrokeshire Local Partnership, Federation of Small Businesses, Pembrokeshire Business Club, and others. Amongst the initiatives established to assist in the development and expansion of businesses through the provision of grants, advice and/or information are the following : - Business Connect Wales (WDA); Farming Connect (WDA / WAG); Agri-Food Programmes (WDA / WAG); Rural Recovery Plan (WAG / WDA); WalesTrade International (WAG); Team Pembrokeshire (WDA/PCC); the LEADER + initiative (WDA / PCC / Community Councils); the Business Information Gateway for Wales (BIG Wales) established by the University of Wales, Swansea; Finance Wales (WDA / WAG); the Community Regeneration Tool-kit and the Small Towns and Villages Initiative (WAG / WDA / PCC).

On a local level, Town Councils, Community Councils and a range of voluntary and other organisations are working with local authorities and statutory bodies to produce and implement Local Plans and Community Action Plans under the Leader + initiative. Many of these have a business development / job creation element which will be guided by and will feed into the Joint Unitary Development Plan.

Regulation of business and other development through the planning process is implemented through Pembrokeshire County Council and the Pembrokeshire Coast National Park Authority as the Local Planning Authorities operating under the framework of EU or UK / Welsh Government legislation, policies or guidelines. The base legislation underpinning planning activity is the Town & Country Planning Act 1990 (as amended) and the Environment Act 1995. Development requiring a form of authorisation which is proposed within an area designated under an Act or Directive as a protected area, e.g. Site of Special Scientific Interest, Special Area of Conservation, Special Protection Area, etc. would require the approval of the Relevant Authority responsible for the authorisation prior to development commencing. In most cases this would require the carrying out of an Environmental Impact

Assessment. The Countryside Council for Wales is the Government's adviser on such matters in Wales.

The recognised trade federation for the UK marine industry is the British Marine Federation, formerly the British Marine Industries Federation. The BMF provides a range of services to members which include : export, environment and marketing services and advice; commercial information and guidance on best practice; legal, technical and training services; government relations; free planning advice; an Environmental Code of Practice.

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ORGANISATIONS AND OTHER INTERESTS INVOLVED
Milford Haven Port Authority / Milford Docks Company; Pembrokeshire County Council; Welsh Assembly Government; Pembrokeshire Coast National Park Authority; Welsh Development Agency; Crown Estates Commission; Community Councils; Town Councils; DEFRA; DETR; Wales Tourist Board; National Farmers Union; Farming Union of Wales; European Marine Sand and Gravel Group; British Marine Aggregate Producers Association; British Marine Federation; ELWa; Health & Safety Executive; Maritime & Coastguard Agency; Pembrokeshire Chamber of Commerce; Arena Network; Groundwork Wales; Confederation of British Industry Wales; Countryside Council for Wales; South & West Wales Fishing Communities Ltd.; Aquaculture Wales; Pembrokeshire Local Action Network for Enterprise and Development (Planed); Environment Agency Wales; Pembrokeshire Business Club; Pembrokeshire Business Initiative; Pembrokeshire Tourism; Federation of Small Businesses; Co-operative Centre Wales.

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INTERACTIONS
The following interactions are particularly relevant to this Topic Area : -

- Much of Pembrokeshire's business activity and economic stability is related to tourism, fishing and agriculture and is therefore dependent on the maintenance of high quality and diverse environments and wildlife resources
- Industrial / commercial development and enterprise is essential to the economic and cultural sustainability of many coastal communities
- Many forms of commercial / industrial development would be inappropriate in terms of its impact on landscape, recreational enjoyment and the environment generally in sensitive areas
- The environment and its wildlife resources are adversely affected by some industrial and business activities, both local and remote, through, e.g. polluting discharges, spillages, discarded waste and litter, spatial intrusion and disturbance, etc.
- The means of transporting goods and materials by air, land and sea can have infrastructure requirements, polluting inputs and other effects which impact on the environment and the visual attraction of the area
- The socio-economic impacts on human communities of environmental and nature conservation protection measures must be considered so that a balance can be found to meet the needs of both
- Pembrokeshire's industrial and commercial past is a potential source of interest and attraction to boost tourist business

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ISSUES

The issues identified below have been gathered via a variety of means including Topic Group meetings, Coastal Surgeries, other reports and plans, questionnaires and general communications. They are not the views of the Forum, but instead a culmination of concerns from a broad range of individuals as well as organisations from the public, private and voluntary sector. These issues will now be further analysed and will form part of an 'Issues Report'. It is not the purpose of Forum to resolve each of the individual issues identified, but instead to pass on the concerns to each of the relevant organisations responsible. Where these bodies do not exist, or where there is a need for a more collaborative approach, this will form the focus for the strategy, action plan and future Forum work.

1. LNG
    - Development of proposed LNG facilities would increase large vessel traffic in the Milford Haven Waterway and its approaches with resulting potential impacts on safety, activities and interests of other users.
    - LNG development plans carry no proposals for improving / expanding the local domestic gas supply network which is deficient in or absent from many parts of the County
2. Pollution
    - Cumulative effects of industry related pollution build – up, e.g. heavy metals
    - Light pollution, particularly from refineries.
    - Odour problems at the Elf Oil Refinery, Milford Haven
    - Run-off from urban and industrial sites can cause pollution and increase flooding risk
    - Contaminated groundwater under Milford Haven refinery sites
3. Poor infrastructure for industrial / business development
    - Inadequate broadband provision in County is a curb to business development
    - Poor public transport provision in County limits mobility of work forces
4. Education / information / interpretation
    - Low public expectation and confidence / optimism in relation to business success, GDP improvement potential and wealth creation
    - Lack of awareness of true facts about marine industry and commerce by the general public creates a climate of mistrust, doubt and fear which is unhelpful.
    - Lack of guidance and information to develop effective sustainable strategies to manage waste, provide sufficient facilities and comply with future EC Directives (e.g. Landfill Directive) in the area
    - There is a need to balance public water supplies against future demands
5. Visual impacts on landscape
    - Visual Impact of condensing water vapour plumes above the Texaco Oil Refinery, Pembroke
6. Waste disposal
    - A huge quantity of waste is produced from industrial, commercial and domestic sources. Not enough is re-used or recycled and the majority is disposed of to land fill
    - Potential environmental impacts arising from the closure of the Gulf Oil Refinery, Waterston, Milford Haven

- Environmental impacts arising from the demolition of National Power's Pembroke Power Station

7. Ecological / environmental impacts
   - Collection for the aquarium and curio trade can impoverish certain marine populations and have an effect on ecosystems
   - Aggregate dredging for sand and gravel can have environmental effects through removal of habitat, increased turbidity, modification of sediment transport processes, loss / damage to species and ecosystem effects.
   - Civil engineering can cause physical disturbance, possible modification to the hydrodynamic regime, potential contamination (from development and also maintenance, e.g. paints), loss / modification to species / habitats, obstruction of migratory fish, future decommissioning of structures.
   - Dumping and the creation of dumps during military activities can cause physical disturbance, potential contamination and loss / modification to species and habitats.
8. Compensation claims
   - Some SMEs have had difficulty obtaining fair and reasonable settlements from ITOPF / the oil industry following oil pollution incidents.

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Last amended December 2003