



Shellfish
Association of Great Britain

PotentShell

55th Conference of the Shellfish Association of Great Britain

About The Crown Estate

Dating back more than 260 years, The Crown Estate is a unique business with a diverse portfolio that stretches across England, Wales and Northern Ireland



Established by The Crown Estate Act of 1961

As an independent commercial business with accountability to Parliament.



Return our net revenue profit to the Treasury

For the benefit of the nation's finances, with £3.2bn generated in the last 10 years.



Active owners and managers of land and seabed

We are one of the UK's largest landowners, with some of the nation's most remarkable places and spaces. We seek to leverage our scale and convening power to make a meaningful difference.



Guided by a compelling purpose

To create lasting and shared prosperity for the nation



Delivering an ambitious strategy

Guided by our purpose and informed by major trends impacting our business, we seek to create broad financial, environmental and social value for our stakeholders, customers and the nation.

The Crown Estate has **significant and diverse assets and land holdings**, with the responsibility to steward them for the benefit of the nation.



£15.8bn
value of our portfolio in 2023



11.8GW
of off-shore wind capacity



c.200k acres
owned in the UK



>12,000km
of coastline



c.1,200
commercial customers



c.4,000
residents



c.11million sq. ft
prime London real estate



14%
of UK power demand from OSW



5.6million visitors
Windsor Great Park, most visited UK attraction in 2022¹



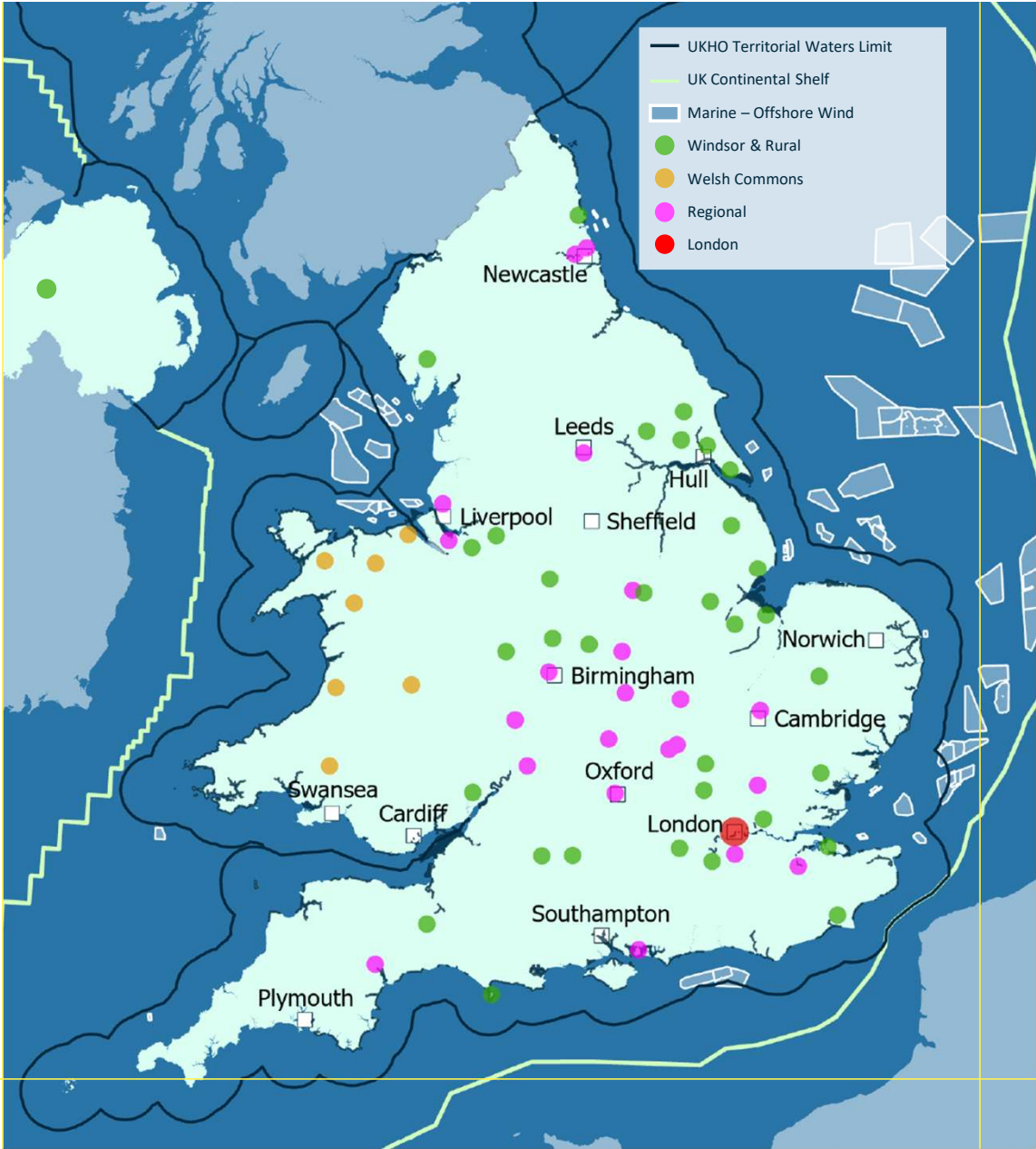
3x more seabed
than combined landmass of England and Wales



c.4million sq ft
of commercial development space opportunity in the regions



c.20,000
new home opportunities



6. ¹Association of Leading Visitor Attractions ([link](#)).

As custodian of our seabed & coastline, managing a wide range of sectors, we have a vital role delivering long-term value for the nation

As an island nation with high population density and valuable wind/natural resources, the seabed and coastline are critical for the economy, restoring nature and delivering net zero. Therefore, we have a vital role to play managing this space to deliver long-term value for the nation...

OUR PAN-SECTORAL VIEW



Energy

Offshore wind
Energy conversion
Marine energy



Storage

CCUS
Hydrogen
Natural gas



Infrastructure

Power & Telco
Cables
Pipelines



Minerals

Reclamation
Aggregate dredging
Marine mining



Coastal

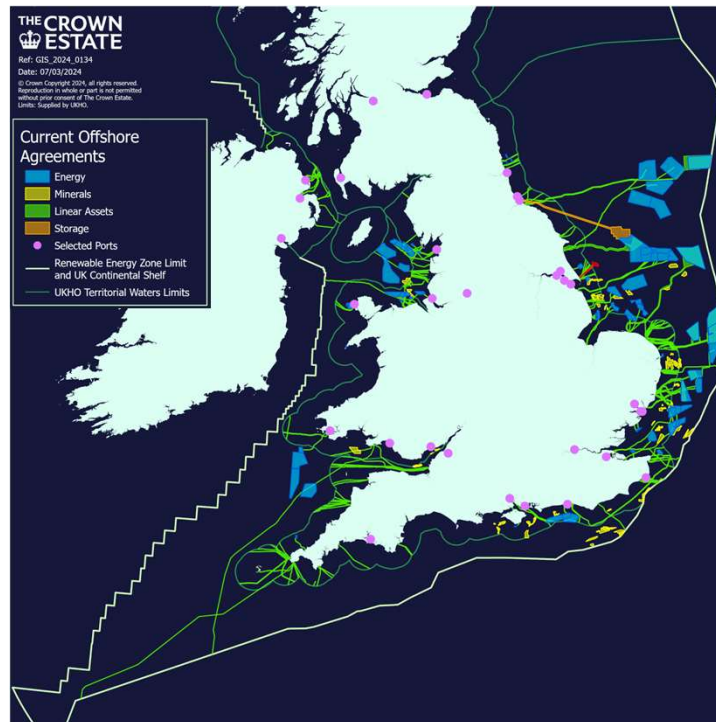
Ports and harbours
Aquaculture
Leisure



Habitats

Habitat creation
Biodiversity
Nature recovery

OUR FOOTPRINT



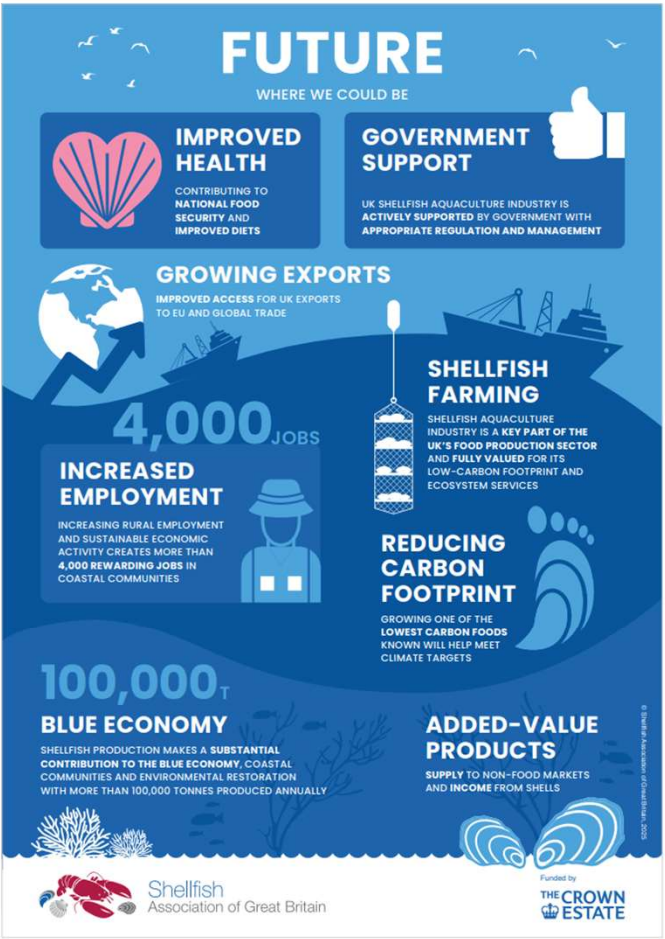
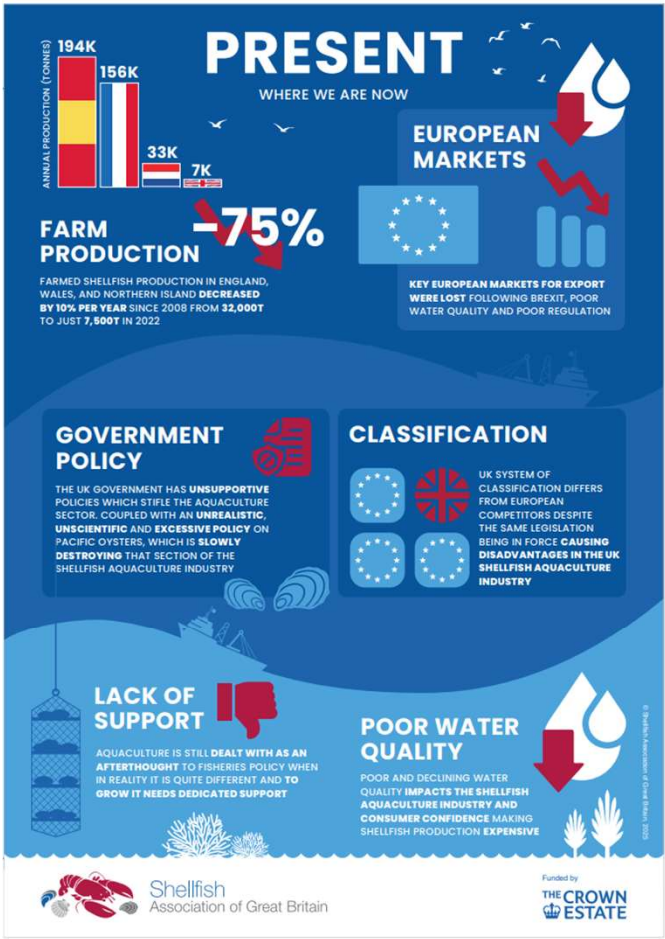
OUR POSITION AND CAPABILITIES

- ✓ Our clear purpose to create lasting and greatest value for the nation
- ✓ Statutory independence and our ability to take an objective long-term view
- ✓ Our deep expertise and experience (incl. multi-sector knowledge, data and spatial insight)
- ✓ Our ability to look across sectors (e.g. energy, minerals, telecoms) **and nature** balancing competing and complementary demands
- ✓ Our reputation to convene and partner with others to bring the marine vision to life

Our Nature vision - 4 commitments - 3 TCE-wide goals



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Regenerative Marine Aquaculture

Commercial aquaculture performed with focus on social, economic, and ecological responsibility and stability, with minimal external input and impact to the environment

2 sub-sectors:

- a) Bivalve shellfish (mussels, oysters, clams and scallops)
- b) Seaweeds (kelps) chiefly on deployed equipment such as suspended ropes, rafts and intertidal trestles



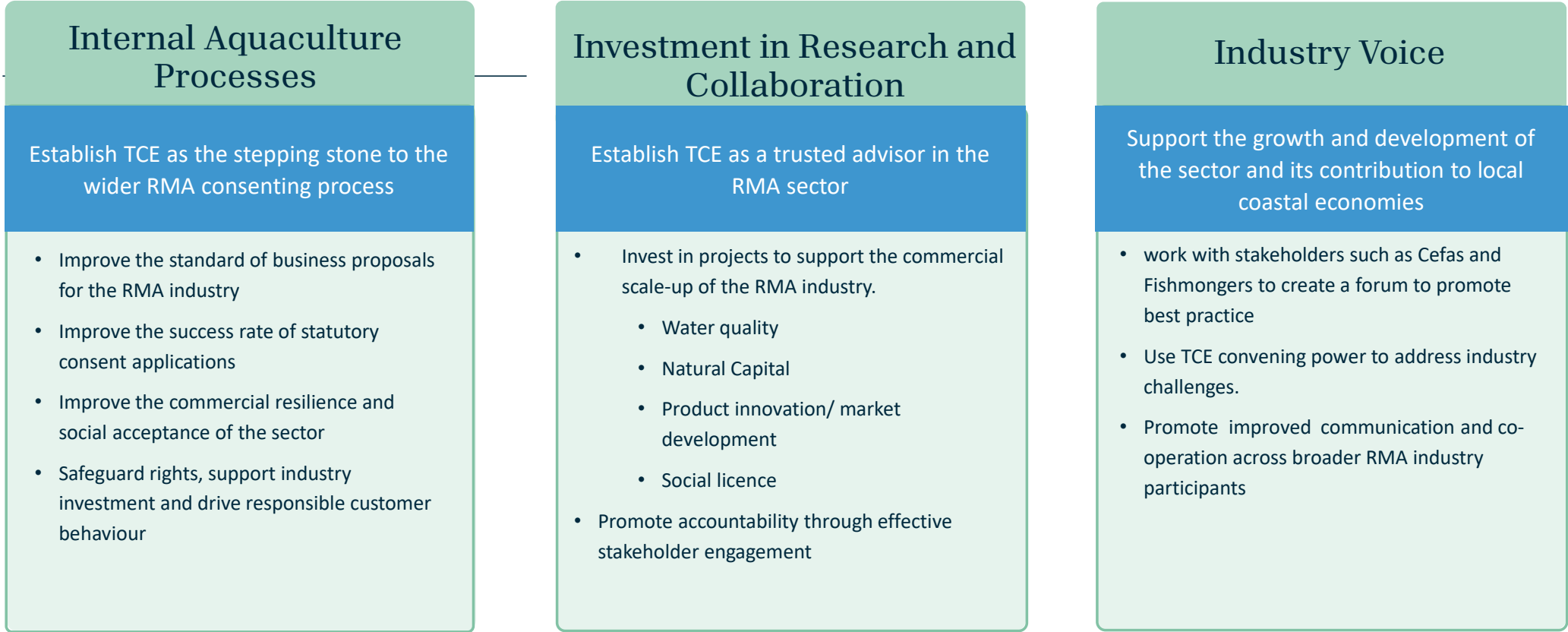
Challenges: Lack of scale, political visibility, access to finance and market development, lack of social license

Opportunity: High environmental and social value, and potential to grow localised economic value as industry matures

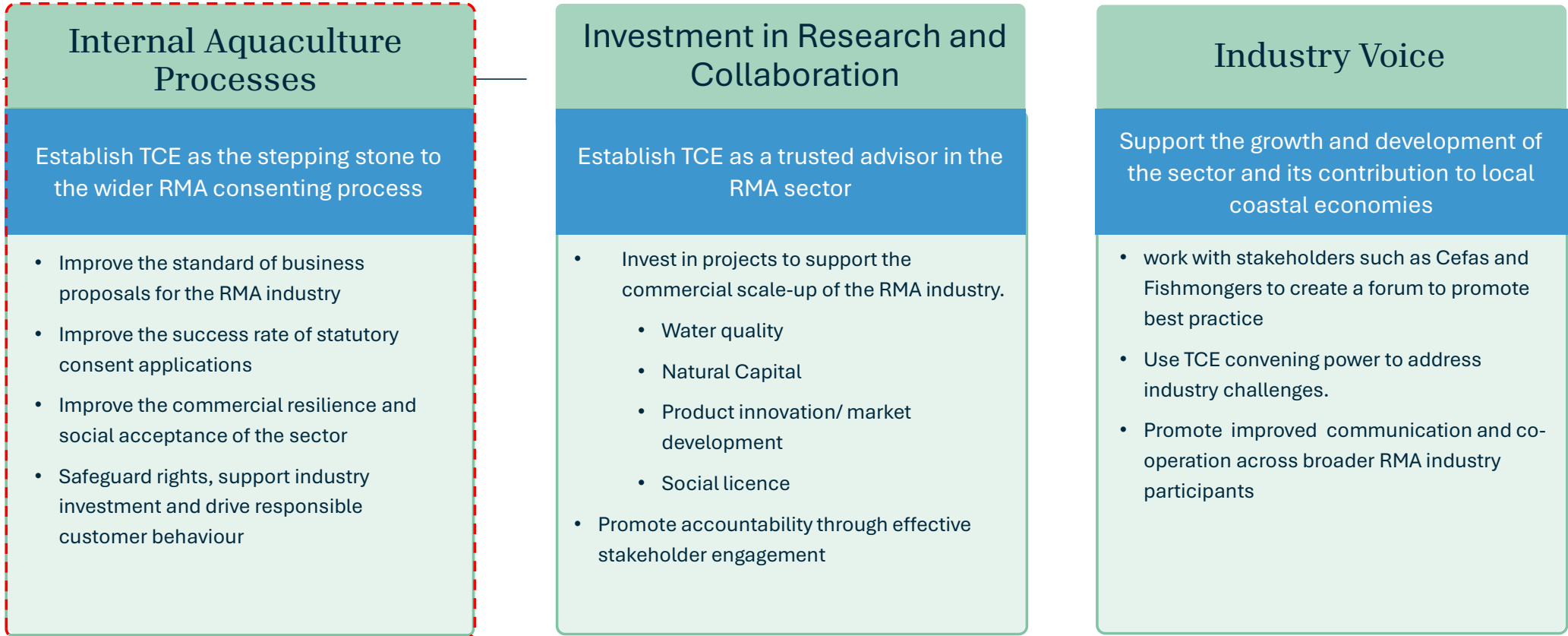
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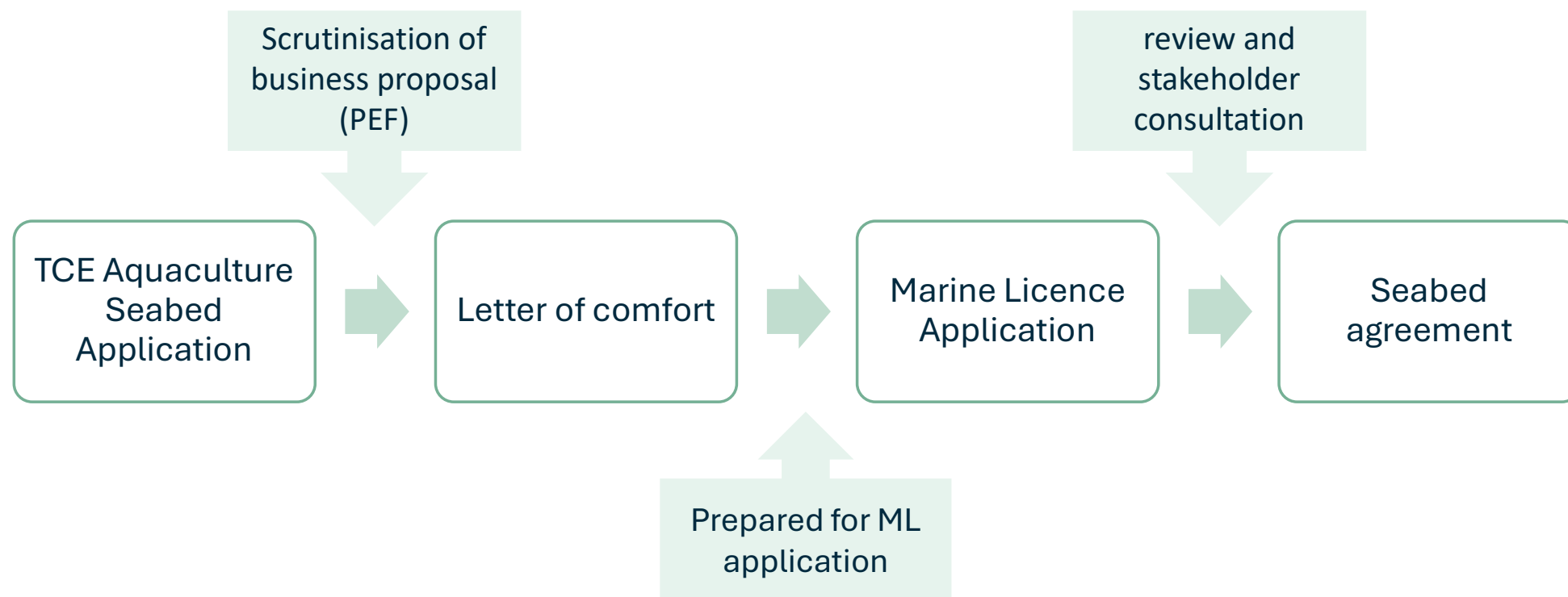
TCEs Regenerative Marine Aquaculture Strategy



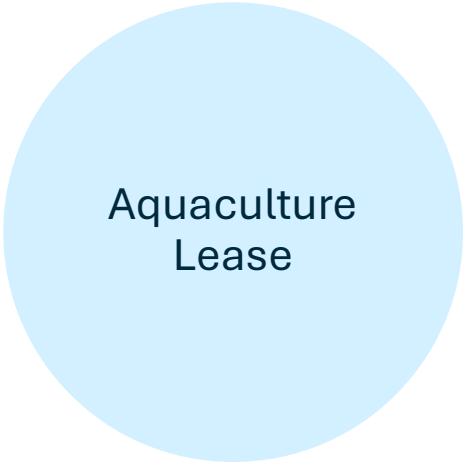
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Internal Aquaculture Process

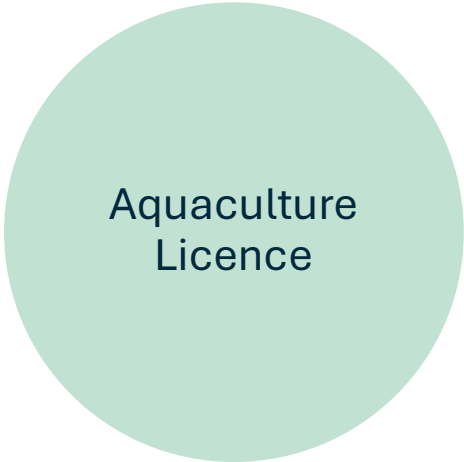


Agreement Types – follow business/project maturity




Aquaculture
Lease

large-scale or expansion-
ready commercial
operators



Aquaculture
Licence

trial-phase, scalable,
commercial aquaculture
projects.



Aquaculture
Licence
Nature

non-commercial
environmental projects
(e.g. water quality,
restoration)

Agreement Types – follow business/project maturity

| | Aquaculture Agreement for Lease | Aquaculture licence Small Works | Aquaculture licence Nature Small Works |
|----------------------|------------------------------------|------------------------------------|-------------------------------------------|
| Size | >4Ha | <4Ha | <4Ha |
| Length of agreement | 5 yrs renewable | 5yrs non-renewable | 5yrs renewable |
| Stage | large scale / expansion | trial / 1st phase | trial / 1st phase |
| Commercial or nature | Commercial or large nature | Commercial | Nature |
| IP (SCA) | yes | yes | yes |
| Exclusivity | Yes | no | no |
| Cost | Processing costs + minimum/2% | Standard rate per m | Standard rate per m Or £1 if demanded |

Requirements - Lease/Licence



Business plan

- Business proposal overview
- Market and suppliers
- Finance
- location



Best Practice

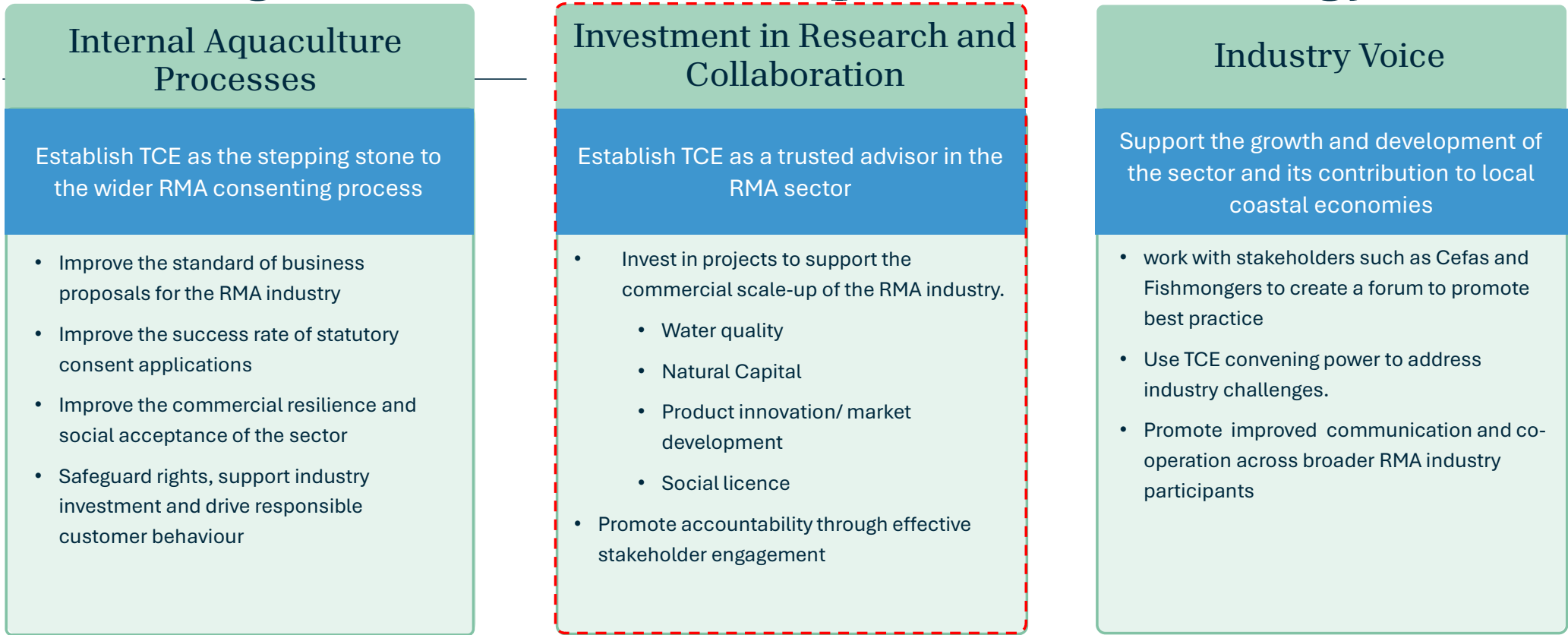
- Species
- Cultivation methods
- Onshore and offshore infrastructure
- Expansion plans



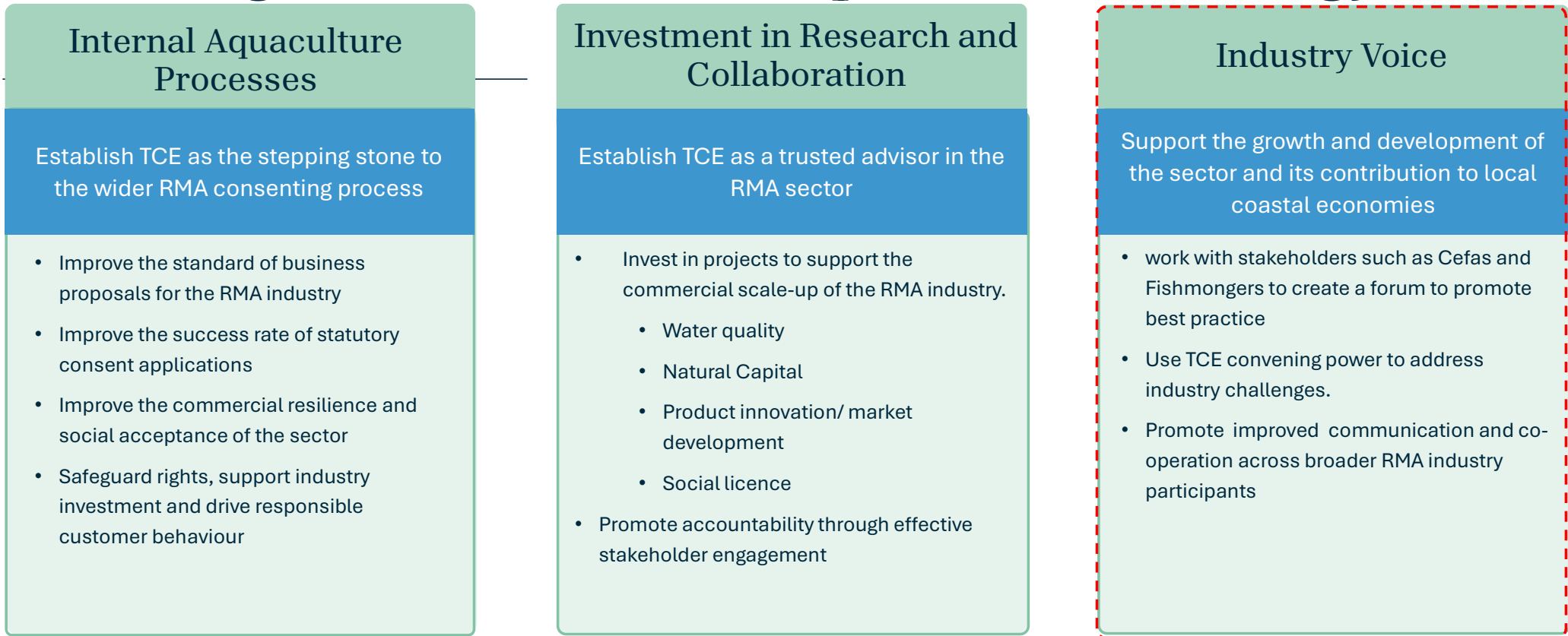
Governance and leadership

- Engagement Plan
- Value Creation
- Decommissioning plan
- Health and Safety

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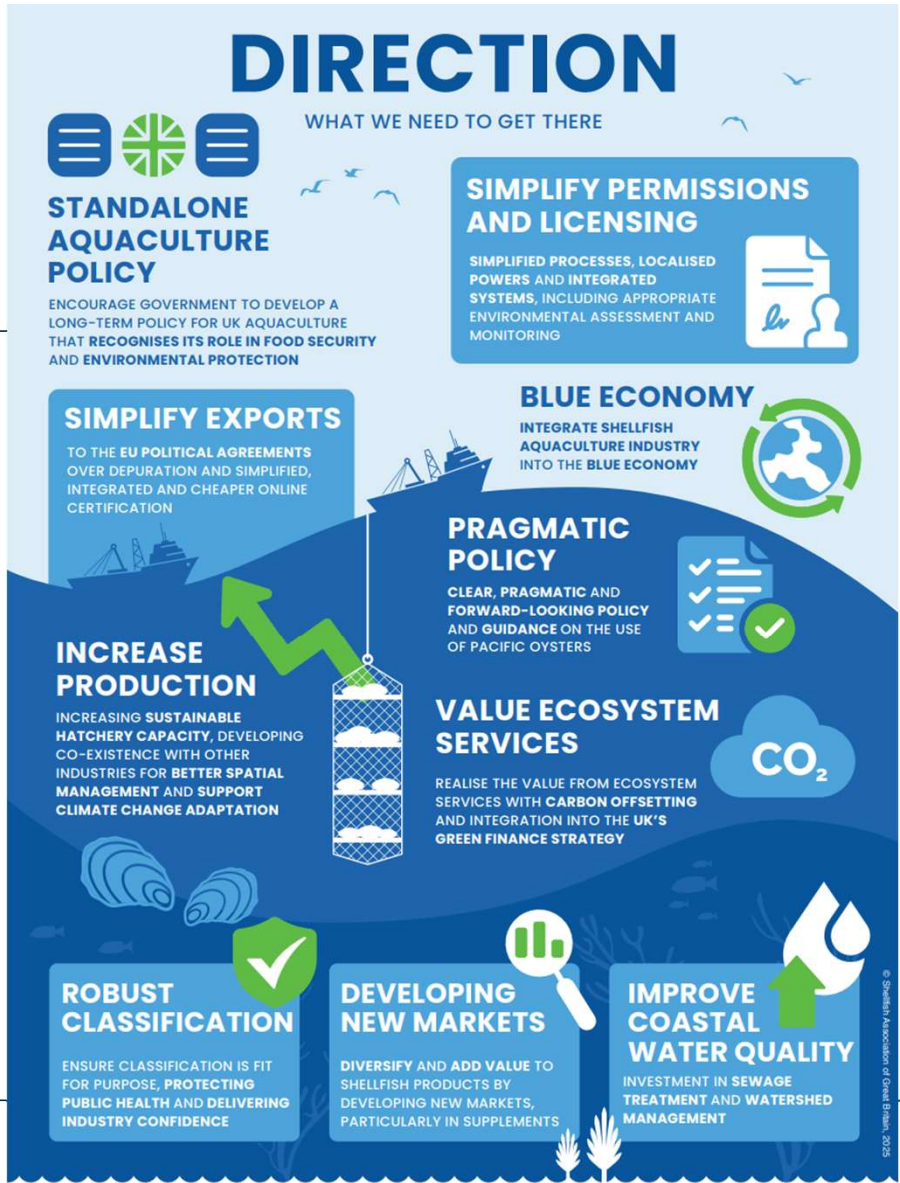


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What's Next?





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Thankyou

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