

Shellfish Association of Great Britain Conference 2026

The Crown Estate

⇒ Marine Delivery
⇒ Routemap



Shellfish
Association of Great Britain

THE CROWN
ESTATE

Intro





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 over £3bn 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

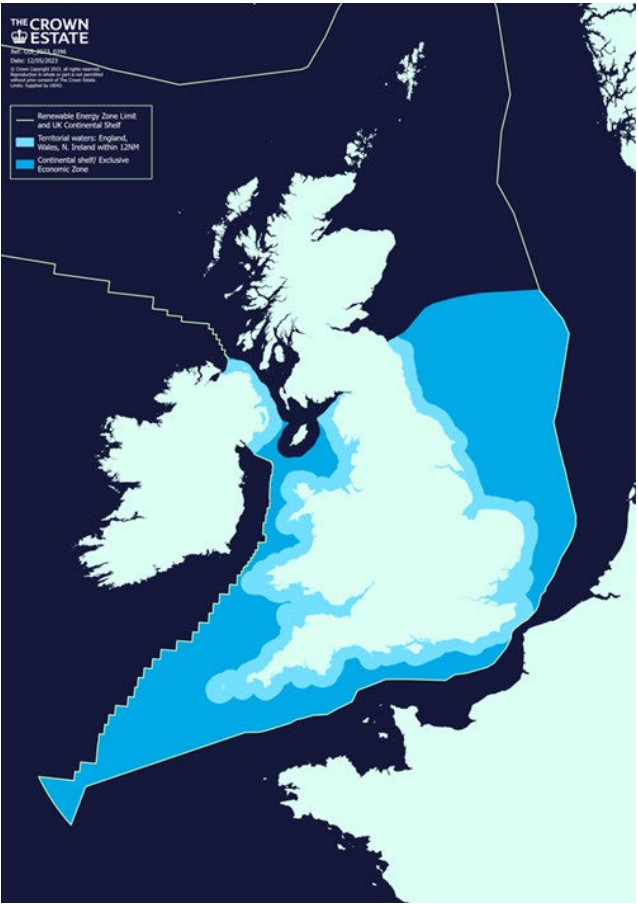
Guided by our purpose and informed by major trends impacting our business, we seek to create broad financial, environmental and social value for our stakeholders, customers and the nation.

Managing sustainable development of the seabed to deliver long-term value

OUR PAN-SECTORAL VIEW **INCL. HABITATS**

 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 harbors Leisure	 Nature Habitat creation Nature recovery Aquaculture

OUR OFFSHORE AND ONSHORE FOOTPRINT



OUR CAPABILITIES

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

Aquaculture Updates

Enable the sustainable growth and development of the aquaculture industry in England, Wales and Northern Ireland



Leasing Process

- Update legal Agreements
- Update Aquaculture application process
- Update standard rent terms and conditions
- Improve transparency



Industry Facilitation

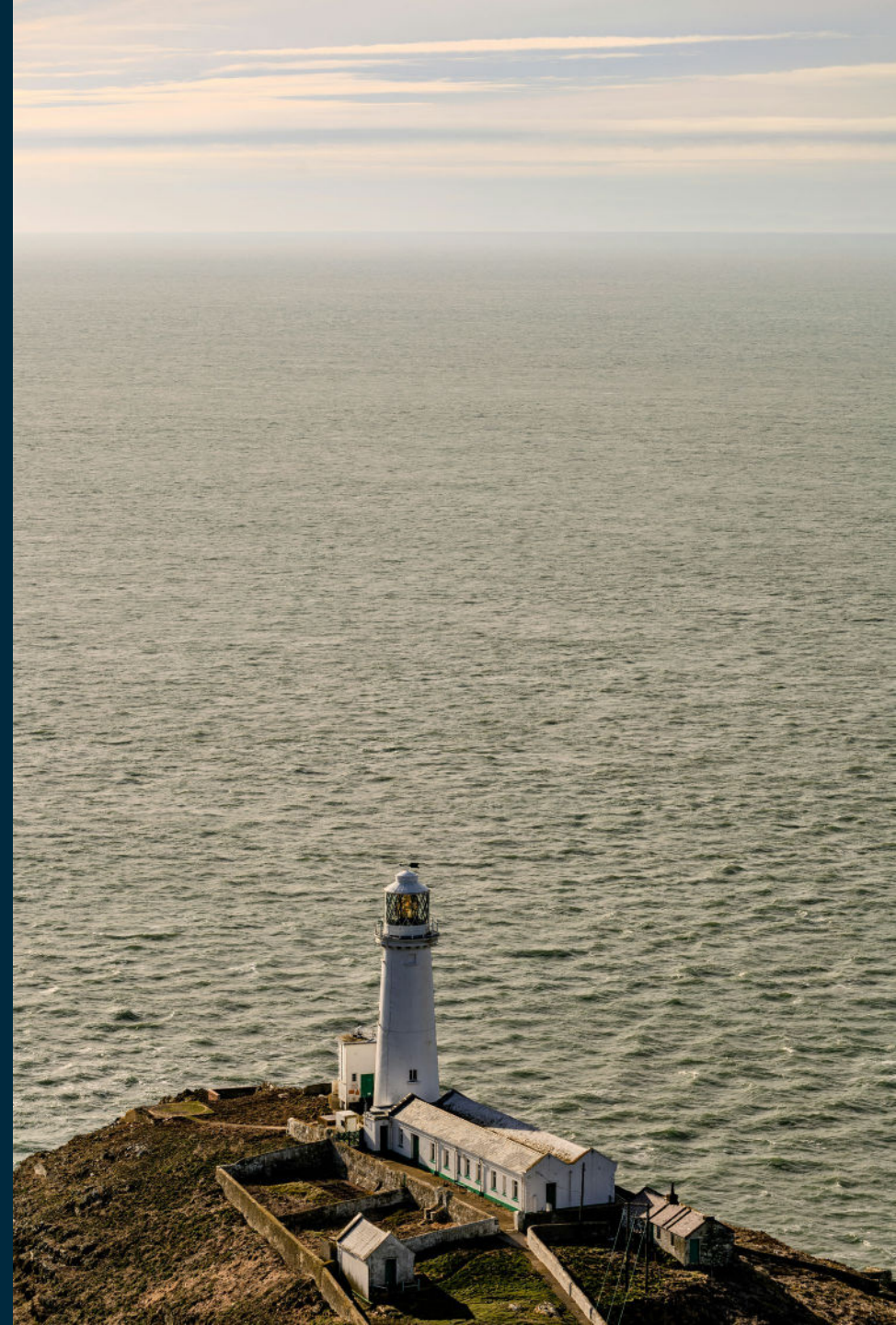
- Regen Aqua Forum
- Aquaculture for water quality
- Health and Safety guidance



Data and evidence

- “Size of the Prize” Value of Shellfish Aquaculture
- Update Aquaculture Site suitability data

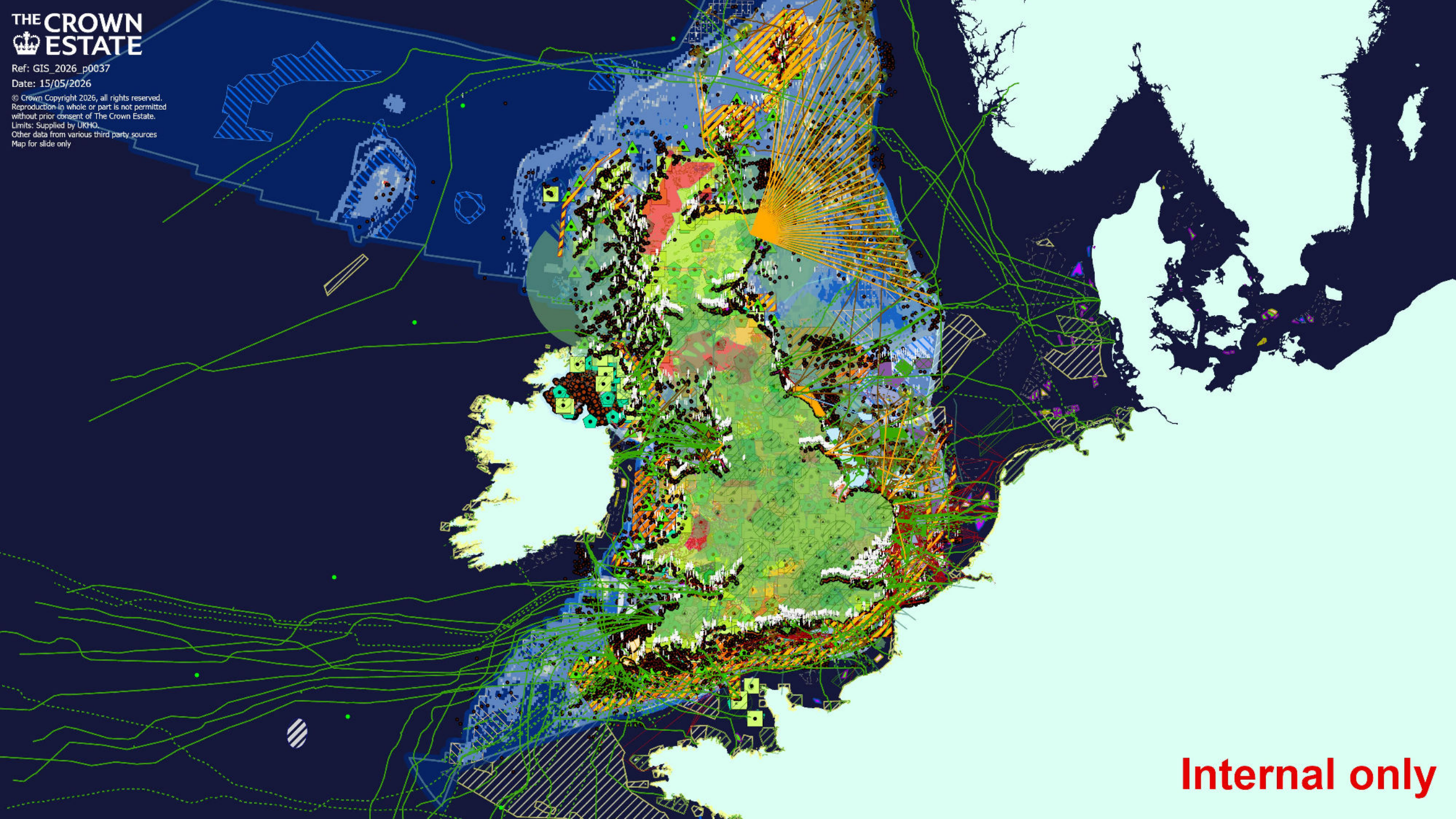
Marine Delivery Routemap







Internal only



WELCOME TO THE MARINE DELIVERY ROUTEMAP

The Crown Estate's interactive tool providing a shared evidence base to support transparent, well-informed decisions on future uses of the seabed

Explore the Routemap



Shared Evidence



Long-Term



Innovative Digital Tool



WHAT IT IS

An interactive digital tool designed to improve information and decision making about the future of our seas. The Routemap can dynamically model and map potential use scenarios for the seabed and coastline around England, Wales and Northern Ireland over coming decades.

The Marine Delivery Routemap

WHAT IT WILL ENABLE:

- A clear understanding about future opportunities for the seabed and coastline, showing where energy, infrastructure and nature investments might take place and when, enabling the best outcomes for the economy, environment and society.
- Speed up clean energy projects and critical infrastructure by enabling collective planning what we need to do to accelerate delivery
- Spark investment in UK supply chain opportunities so communities can plan, for example through developing local skills.

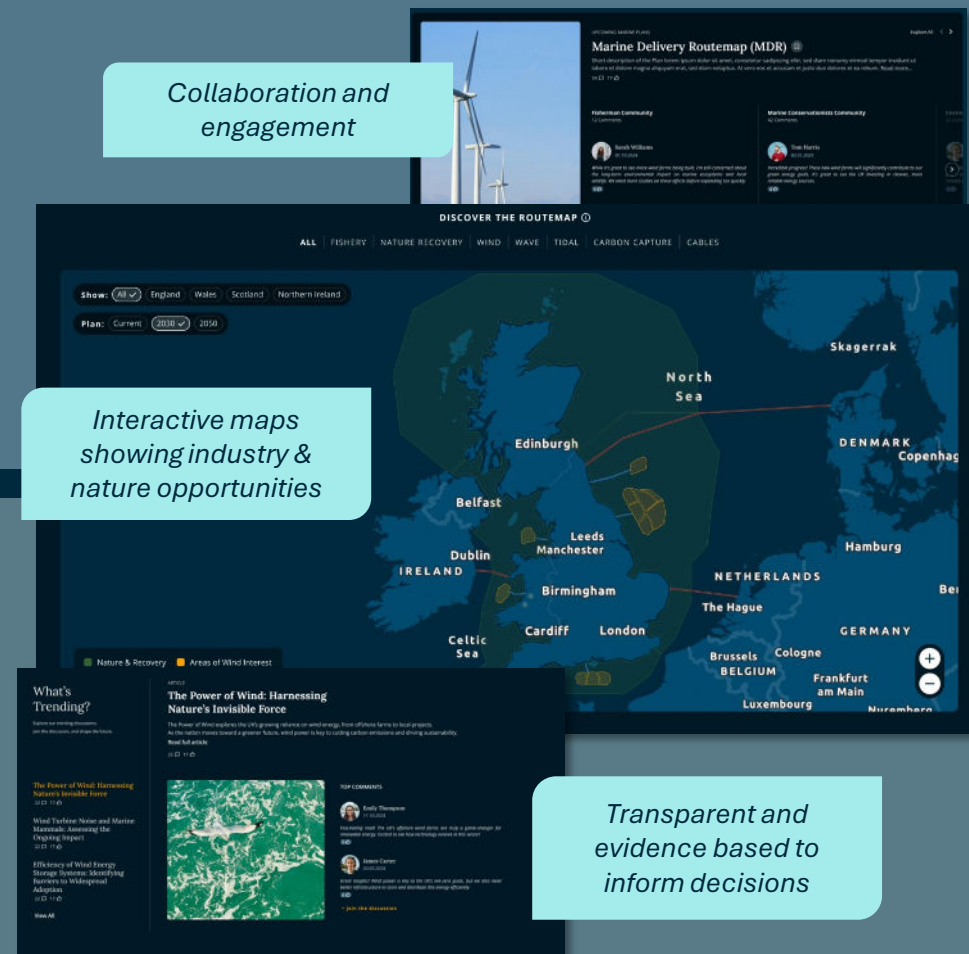
WHAT IT CONTAINS:

- The first-ever interactive tool showing future opportunities for the seabed and coastline built on our world-class spatial mapping and digital expertise.
- A long-term tool to help identify when and where key infrastructure and supply chain investments are needed.
- A shared evidence base for the seabed and coastline that reflects existing policies and regulation and is informed by stakeholders.

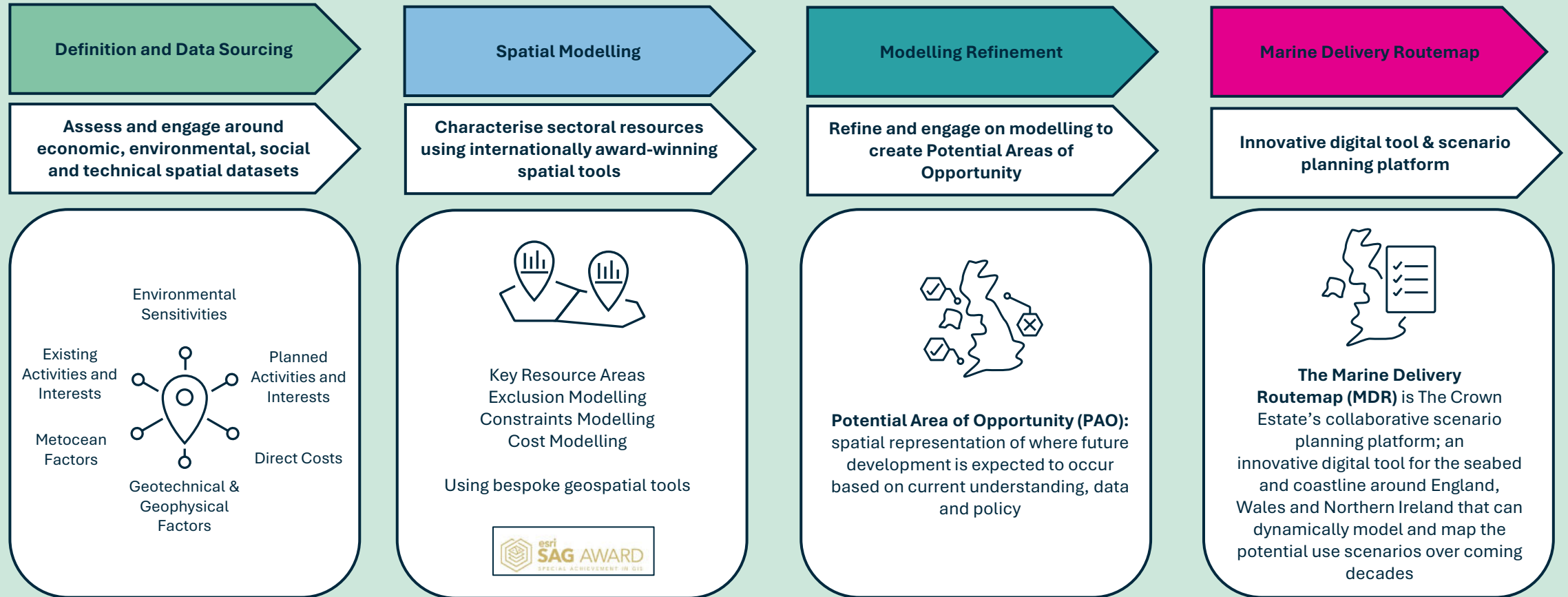
Collaboration and
engagement

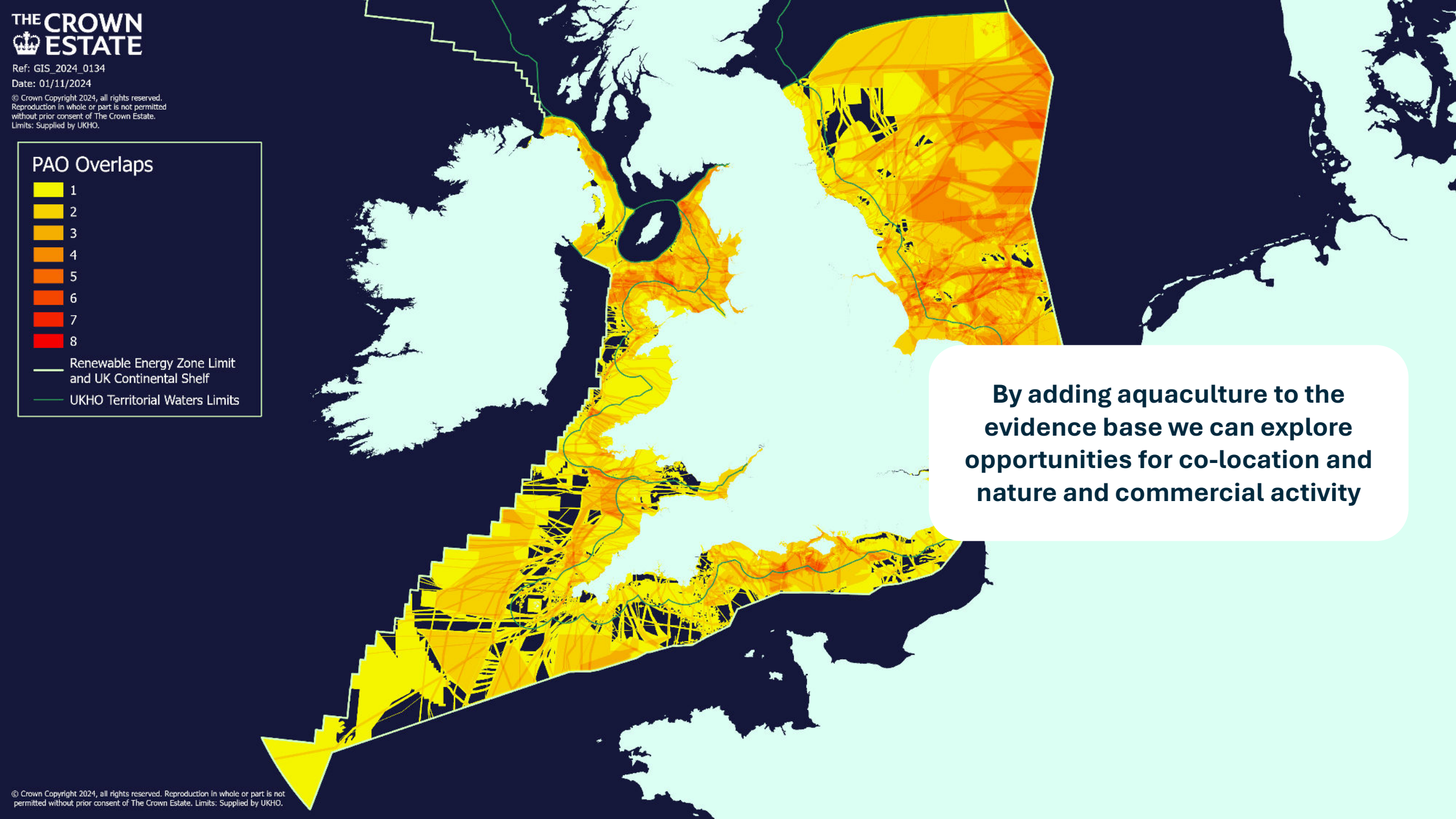
Interactive maps
showing industry &
nature opportunities

Transparent and
evidence based to
inform decisions



Whole of Seabed evidence base processes





PAO Overlaps

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- Renewable Energy Zone Limit and UK Continental Shelf
- UKHO Territorial Waters Limits

By adding aquaculture to the evidence base we can explore opportunities for co-location and nature and commercial activity

Aquaculture in MDR

Spatial Maps

We currently do not have a Potential Area of Opportunity (PAO) for Aquaculture



What is this map?

Key Resource Area

The Key Resource Area for the Aquaculture sector identifies where environmental conditions may be most suitable for seaweed and shellfish cultivation, based on data layers developed in the 'Aquaculture Site Suitability Report' commissioned by The Crown Estate and delivered by the University of Plymouth (2024).

The study integrates a wide range of environmental datasets. Each environmental variable was processed and interpolated onto a standard grid in ArcGIS, and each grid cell was scored against species-specific environmental thresholds which were informed by previous literature. This method produced suitability data layers that clearly identified where environmental conditions most closely match the requirements for key aquaculture species and culture types across the marine environment, providing robust spatial evidence to inform strategic planning and sector development.

These spatial data layers and maps have been extracted for species relevant to The Crown Estate's aquaculture strategy and have been included on the platform to improve access to valuable information that could support the growth of the aquaculture industry. Please reach out if you would like a copy of the report.

Data Limitations

The environmental data and spatial analysis presented in this section are based on the best available evidence at the time of the report.

Fisheries Engagement



Fisheries Engagement

Valuable lessons learned from previous leasing rounds – early engagement needed, meeting fishers in their place of work vital and working around tides/time of work essential.

Key to engage at national and local level – that's why we are visiting communities & engaging directly, with the support of industry bodies

We do this to ensure fisheries data and perspectives are fully considered in the development of the Routemap and any subsequent leasing decisions



May 2026 Fisheries Roadshow

- Engaging on areas for future offshore wind in in the North East
 - Three locations visited – Bridlington (12th May); Whitby (13th May) and North Shields (14th May).
 - TCE Team: Joe Sykes, Louise Smith and Abby Haines, as well as TCE fisheries advisors: Melin Jackson and Colin Warwick.
 - Data collected – 16 vessels in total (static gear
 - Evidence collected consisted mainly of screen shots from vessel plotters overlaid on the TCE OSW area shape files.
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Insights:

- Early and consistent engagement with fishers is building trust, improving participation, and delivering valuable local evidence.
- Returning to communities as promised, demonstrating how feedback influences decisions, and using practical quayside engagement approaches has strengthened TCE's approach to engagement.

Many thanks!