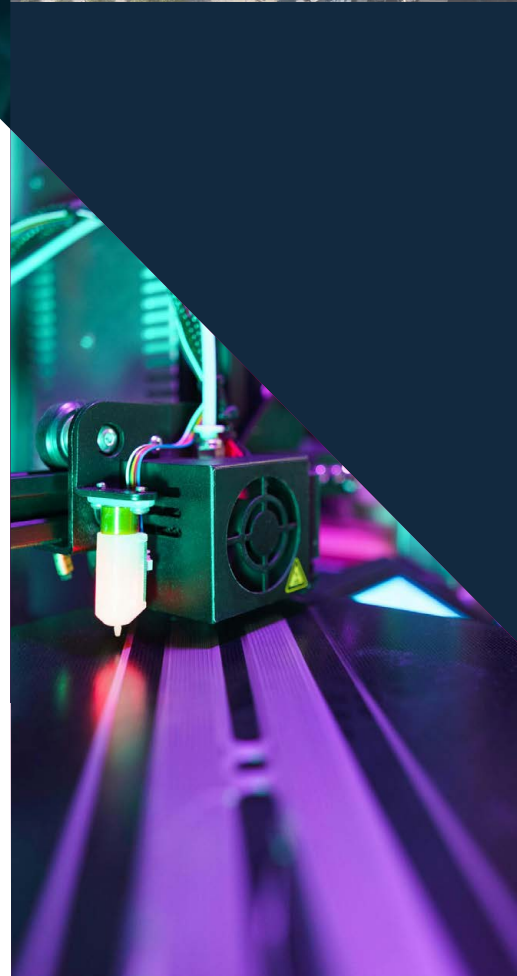




South West Wales Investment Prospectus

2026–2031

South West Wales Investment Prospectus

The South West Wales Investment Prospectus presents investment opportunities of over £6 billion, highlighting the region’s ambition and capacity for sustainable growth.

The region benefits from robust governance and effective delivery structures, providing investors with confidence in its ability to realise complex, multi-partner and high-value projects.

South West Wales also offers a distinctive high quality of life, shaped by Swansea’s vibrant waterfront city, a proud industrial heritage, and a rich mix of coastal communities, market towns and outstanding natural environments across Pembrokeshire, Carmarthenshire and Neath Port Talbot.

The region’s geographic assets include two natural deep-water ports at Milford Haven and Port Talbot, alongside two nationally significant landscapes: the Bannau Brycheiniog (Brecon Beacons) National Park and the Pembrokeshire Coast National Park, the UK’s only coastal national park.

Building on areas of significant economic strength such as life sciences and wellbeing, energy, manufacturing technology and materials, and the experience economy, South West Wales is well positioned to unlock new opportunities across key sectors.

Location of South West Wales



- KEY**
- 01. Oriel y Parc Flagship Discovery Centre
 - 02. Pembrokeshire Food Park
 - 03. CO₂ Project
 - 04. Marine Energy Test Area
 - 05. UWTSO Carmarthenshire Campus Redevelopment
 - 06. Cwm Gwyrdd Nantycaws
 - 07. Bre menda Isaf
 - 08. Pentre Awel
 - 09. City Waterfront
 - 10. Porth Copr
 - 11. Swansea Energy & Transport Hub and Port Development
 - 12. Centre for Integrative Semiconductor Materials
 - 13. Port Talbot and Swansea Bay Investment Zone
 - 14. Wildfox Resorts – Afan Valley
 - 15. GCRE

See page 18 onwards for more project details



Introduction from the Corporate Joint Committee for South West Wales

South West Wales is a region with a clear and unified ambition for growth, innovation, and long-term prosperity.

Through the South West Wales Corporate Joint Committee (CJC), we now have a single, strategic leadership body that brings together the collective strengths of Carmarthenshire, Neath Port Talbot, Pembrokeshire, and Swansea.

This joined-up approach enables us to speak with one voice, plan with shared purpose, and create the conditions for investment at a scale that delivers real impact for our communities and our economy.

Our region offers a compelling and distinctive investment proposition: world-class natural assets, a highly skilled workforce, and a fast-growing cluster of innovators across sectors such as renewable energy, advanced manufacturing, digital technologies, and life sciences.

South West Wales is primed for sustainable growth. Add to this our strong universities, vibrant cultural offer, and exceptional quality of life, and it becomes clear why investors increasingly see this region as a place of opportunity.

Central to our success is collaboration. The four local authorities of South West Wales have a long track record of working together, and the CJC strengthens this partnership further.

By aligning our planning, transport, economic development, and strategic investment frameworks, we are creating a more coherent, predictable, and supportive environment for business and investors.

We also have a proven ability to deliver. The Swansea Bay City Deal has already demonstrated what is possible when regional partners and the private sector work together. Major programmes such as the Bay Technology Centre, Swansea Arena, Pentre Awel and the Pembroke Dock Marine development show that

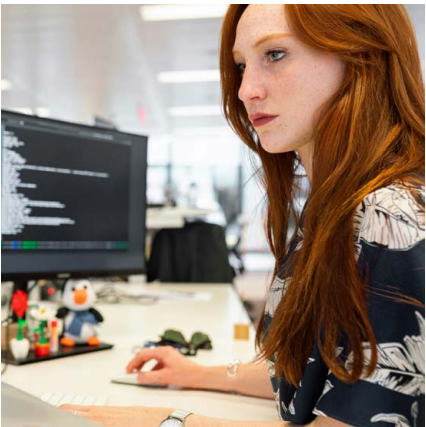
we can deliver complex, high-value, transformative initiatives that generate confidence and unlock further investment.

As you explore this prospectus, I invite you to join us in shaping the next chapter of South West Wales's growth story.

Our region remains open for business. It is an area where innovation opportunities and investment are shared between public and private sectors, and where you will be supported to succeed.



Rob Stewart –
Leader of Swansea Council and
Chair of the Corporate Joint
Committee for South West Wales





Vision: Strong Foundations. Strong Future.

A commitment to our people

In Wales, we do things differently. Our commitment to the Well-being of Future Generations Act ensures that every decision we make works for our environment, our economy, our society, and our culture. This spirit and practice of joined-up, long-term thinking underpins the way South West Wales is shaping its future; through collaboration, innovation, and shared ambition.

The past is shaping our future

South West Wales is building a future powered by its past. For generations, the region has fed and powered the nation through its farming, heavy industry, ingenuity, and determination. Today, those same foundations are driving a new era of growth. One that is built on clean energy, innovation, advanced manufacturing, and a thriving experience economy.

Strong foundations

With strong governance, strong partnerships, and shared purpose, the region is laying the groundwork for sustainable, inclusive prosperity. Guided by regional economic priorities as outlined in the Regional Economic Delivery Plan, South West Wales is aligning investment, skills, and innovation to create the conditions for long-term success: locally rooted, globally connected.

Diverse economy

Spanning Neath Port Talbot, Swansea, Carmarthenshire, and Pembrokeshire, South West Wales is a regional powerhouse of over 700,000 people and two universities, underpinned by strong and expanding energy, digital and transport infrastructure. This solid foundation is matched by strategic investment: the Swansea Bay City Deal is a £1.3 billion investment that is successfully regenerating places and creating a platform for green growth. Today, the region excels in several sectors with its competitive edge amplified by transformational designations like the City Deal, Enterprise Zones, and the Celtic Freeport, all accelerating large-scale regeneration and private sector investment.

Strong future

Now, with a £6 billion investment pipeline, research-focused universities, a skilled and adaptable workforce, and a shared vision for the future, South West Wales stands ready to lead the UK's next chapter of sustainable industrial transformation.

The vision is to harness its strengths to deliver a connected, confident, and competitive region for generations to come.

Swansea Bay City Deal: Delivery from Investment

The Swansea Bay City Deal is an unprecedented investment of £1.3bn to deliver 9 programme and projects across four themes: Economic Acceleration, Life Science & Well-being, Energy, and Smart Manufacturing. Combining public and private funding, the Deal is expected to boost regional GVA by £1.8bn and create 10,000 jobs over 15 years.



Key Facts

A strong and diverse regional economy

South West Wales has a £16 billion economy, reflecting a diverse and resilient regional economic base (Stats Wales, 2023).

Population scale and demographic strength

Over 711,000 people live in the region (ONS, 2024), providing a strong critical mass across Carmarthenshire, Neath Port Talbot, Pembrokeshire and Swansea.

The region is the second most densely populated in Wales, combining the urban strength of Swansea with high-quality rural and coastal environments.

Long-standing net in-migration demonstrates its appeal as a place to live, work and invest.

Higher education and skills excellence

With almost 37,000 HE enrolments in 2023/24; around one-quarter of all students in Welsh Higher Education institutions; the region benefits from a strong university platform led by Swansea University and University of Wales Trinity Saint David (HESA, 2023/24).

Over 10,000 graduates annually in fields such as engineering, life sciences, digital technology and creative industries.

Internationally significant research and development expertise in our Universities and a strong track record of academic-business collaboration.

Strategic connectivity and ports

The region hosts major ports including Milford Haven and Port Talbot, offering strategic industrial and maritime capabilities.

Two international ferry ports; Fishguard and Pembroke Dock provide key passenger and freight access to Ireland (and the rest of the EU).

M4 corridor provides direct access to Cardiff, Bristol, the Midlands and London.

94% of premises have superfast broadband and 60% have full-fibre availability (Ofcom, 2024), supporting business competitiveness.

As part of the Great Western Railway main line, South West Wales enjoys direct rail services to Cardiff, London, the rest of the UK (and beyond). Rising passenger numbers are helping to drive ongoing upgrades that will further enhance regional and national connectivity.

Energy leadership and industrial strength

With over 850 MW of installed renewable capacity and around 15,500 low-carbon projects, the region is a Welsh leader in renewable energy (South West Wales Energy Strategy, 2020).

Milford Haven is home to one of the UK's largest LNG terminals, a vital national energy gateway.

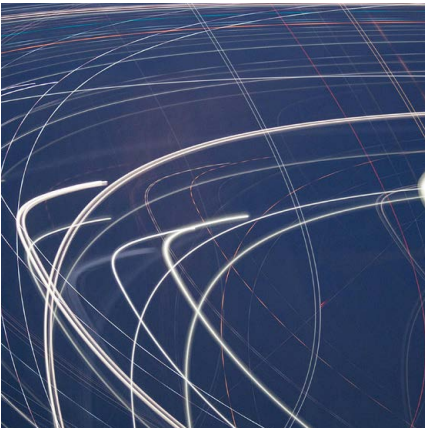
Port Talbot's steel cluster is one of the UK's most significant industrial assets, receiving significant UK government innovation investment to decarbonise.

Natural Capital and Environmental Assets

- Exceptional wind, wave and tidal resources position the region as a leading location for marine energy innovation.
- Two National Parks and the Gower National Landscape provide outstanding natural capital.
- Pembrokeshire’s Marine Special Protection Area supports rich biodiversity and eco-tourism growth.

Tourism, Culture and Quality of Life

- A strong and growing tourism economy which includes over 12 million day visits in 2024 (GBTS, 2024).
- Welsh language and culture remain vibrant, particularly in Carmarthenshire, where almost 50% of residents are bi-lingual.
- The region hosts major national events such as the National Eisteddfod (2026), Wales Airshow and large food, music and arts festivals.
- Coastal destinations such as Pembrokeshire, Gower Peninsula and Tenby rank among the most desirable places to live and visit in Britain.

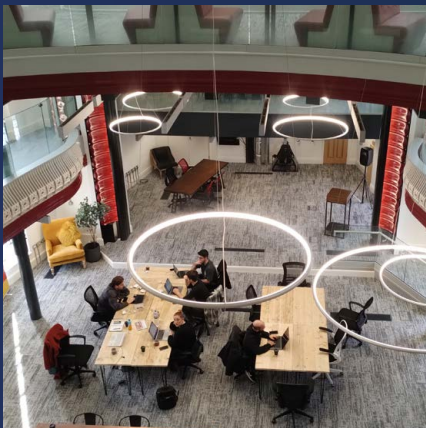


Building on Heritage. Investing in the Future.

A Track Record of Delivery

South West Wales has a proven ability to deliver complex, high-value projects that combine industrial ambition with sustainable growth. Major recent and ongoing investments include:

- **Electric Arc Furnace, Port Talbot:** A landmark £1.25 billion investment is driving the decarbonisation of UK steel production, transitioning from blast furnace technology to low-carbon electric arc processes. One of the largest industrial investments in Wales, the project underlines the region's capability in clean manufacturing transformation.
- **Pembroke Dock Marine Project, Pembrokeshire:** Pembroke Dock Marine is a £60 million investment creating a world-class hub for marine energy and engineering. New regional facilities will support fabrication, testing and deployment, accelerating innovation in floating offshore wind, tidal technologies and low-carbon marine solutions across the Celtic Sea.



- **The Swansea Arena:** The arena sits at the heart of a £1 billion major city-centre regeneration programme. The 3,500-capacity venue was delivered as part of the Copr Bay development, supported by the Swansea Bay City Deal, UK and Welsh Governments and private sector partners. With Swansea Council leading on development and delivery, the arena and associated public realm improvements form a key element of the wider regeneration strategy, designed to boost economic activity, create employment and enhance cultural and visitor amenities across the city.
- **Pentre Awel, Llanelli:** A transformative £200 million health and well-being campus integrating life sciences, healthcare, business incubation, and leisure, creating high-quality employment and commercial opportunities.

The decision by the Welsh National Theatre to base itself in Swansea offers further evidence of the region's growing strength and confidence. It highlights a vibrant cultural economy

emerging alongside major industrial and regeneration schemes, reinforcing South West Wales as a place where diverse sectors can thrive. Together, these developments demonstrate a mature, investment-ready environment with strong public-private partnerships, proven delivery capability and clear long-term momentum; giving investors confidence in the region's future growth.

Powering Wales' Green Industrial Future: Celtic Freeport

The Celtic Freeport is a public-private partnership led by Associated British Ports (ABP), Neath Port Talbot Council, Pembrokeshire County Council and the Port of Milford Haven, bringing together major energy, industry and academic partners. Freeport designation provides targeted tax and customs incentives, supporting business growth, inward investment and job creation across the zone. This framework underpins a cleaner industrial future built on floating offshore wind, hydrogen, sustainable fuels, carbon capture, cleaner steel and low-carbon logistics.



A Unified Region with Strong Governance and Focus

South West Wales offers a stable, joined-up governance model that gives investors confidence and clarity. The South West Wales Corporate Joint Committee (CJC) brings together the four local authorities (Carmarthenshire, Neath Port Talbot, Pembrokeshire, and Swansea) alongside the Welsh and UK Governments.

South West Wales has a strong track record of partnership between industry, government and academia, exemplified by SWITCH – the South Wales Industrial Transition from Carbon Hub. Led by Neath Port Talbot Council and Swansea University, the initiative brings researchers and industry together to drive decarbonisation, accelerate innovation and strengthen the region's transition to a competitive green economy.

The CJC structure ensures coherent regional leadership, alignment with national policy priorities, and a unified investable proposition for private and institutional partners.

It provides a framework built for collaboration, delivery, and long-term stewardship, reducing risk and ensuring continuity from concept to completion. The CJC enables the region to speak with one voice; a critical factor in accelerating approvals, securing co-funding, and ensuring shared accountability for delivery.

Our offer to investors

South West Wales offers a mature, progressive and collaborative environment for investors with a wealth of opportunities. The region provides cost-effective, well-located investment land, creating a solid foundation for new developments and long-term growth.

Progressive Planning Environment

Local planning authorities (Carmarthenshire, Neath Port Talbot, Pembrokeshire, Swansea and National Park Authorities) operate a supportive and forward-looking planning system. This commitment to enabling high-quality projects ensures that investors can move efficiently from concept to delivery.

Connected and Collaborative Business Community

Investors joining the region will find a business base that is both engaged and supportive. From the Private Sector Advisory Board to the Corporate Joint Committee to collaborative initiatives such as the South Wales Industrial Cluster, there is a strong network of like-minded organisations ready to help new ventures succeed.

Deep and Diverse Skills Base

The region has a strong talent pipeline from universities and colleges and hosts one of Wales's largest clusters of welders and engineers. The health sector is the region's biggest employer, with life science making up a prominent part of the business base. This blend of technical skill and academic capability provides investors with the workforce needed to innovate and grow.

Our Commitment to Investors

The aim to help investors achieve maximum total return, aligned with prudent investment management and social outcomes. The CJC would welcome the opportunity to share our wider pipeline of innovation and investment opportunities.

Priorities for investment

The following investment priorities set out where focused action can deliver long-term economic resilience and nationally significant impact.

01

**Mission One:
Powering the UK's
Energy Transition**

South West Wales is uniquely positioned to anchor the UK's drive for energy security and low-carbon transition. The region combines a long industrial heritage with emerging strengths in clean, flexible and resilient energy systems.

02

**Mission Two:
Building a Strong,
Resilient Business Base**

The region's economic ecosystem is evolving fast: from advanced materials to precision manufacturing, data innovation, and health technology.

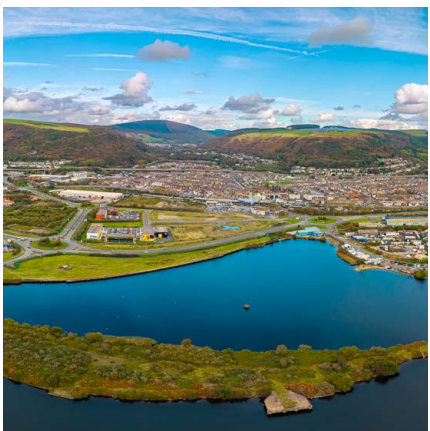
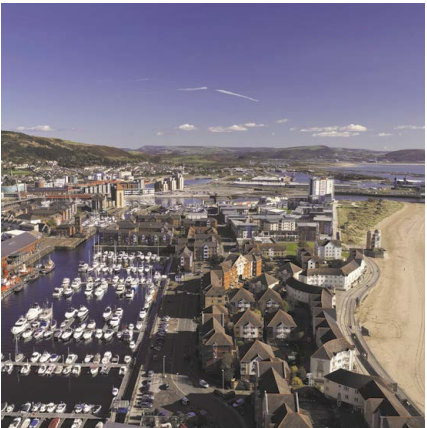
03

**Mission Three:
Investing in the South
West Wales Experience**

From the Gower Peninsula to Pembrokeshire's coast, this region combines natural beauty with vibrant communities and a growing creative economy. South West Wales's "experience offer" including culture, food, landscape and lifestyle is central to its appeal for both investors and talent.

By aligning investment with its established strengths and emerging opportunities, South West Wales is well positioned to deliver balanced, resilient growth that supports both the regional economy and the wider UK.

Read more: www.swansea.gov.uk/article/15033/South-West-Wales-Regional-Economic-Delivery-Plan



Delivering growth with purpose

The region’s economic potential is underpinned by a clear set of strategic priority sectors which provide direction for investment and form the basis of a resilient and forward-looking regional economy.

Energy

Business base: 1,240 businesses
GVA: £2.72 billion
Employees: 7,820

A UK leader in renewable and low-carbon energy development, South West Wales is powering the transition to a net-zero future. The Celtic Freeport at Port Talbot and Milford Haven is catalysing investment in offshore wind, hydrogen, and marine energy, positioning the region at the heart of the UK’s green industrial revolution. With established energy infrastructure, supply chain depth, and a skilled workforce, South West Wales offers a prime location for investment in clean energy generation, storage, and innovation.

Life Sciences & Wellbeing

Business base: 695 businesses
GVA: £1.29 billion
Employees: 30,500

South West Wales is emerging as a hub for cutting-edge healthcare innovation and research excellence. Anchored by Swansea University’s Institute of Life Science and supported by strong partnerships between academia, industry, and the NHS, the region is driving advances in medical technology, pharmaceuticals, and patient care. With a focus on improving health outcomes and commercialising innovation, the life sciences sector offers scalable opportunities for investors in health, digital health, and well-being.



Manufacturing, Technology & Materials

Business base: 1,125 businesses
GVA: £1.59 billion
Employees: 23,465

With a legacy of industrial excellence, the region has evolved into a centre for advanced manufacturing, digital and Industry 4.0 technologies. Its combination of industrial expertise, digital innovation, and research collaboration drives productivity, efficiency, and sustainable growth across multiple sectors. From next-generation materials to precision engineering, South West Wales is a proven environment for businesses seeking to innovate, diversify, and scale.

Experience Economy: Culture, Leisure & Hospitality

Business base: 6,085 businesses
GVA: £1.28 billion
Employees: 39,910

Renowned for its culture, coastline, and quality of life, South West Wales offers a distinctive and sustainable visitor experience. Innovative businesses fuel a high-value visitor and creative economy, from boutique hospitality and food producers to cultural destinations and digital/media innovators. The region’s strong digital infrastructure and creative ecosystem support the growth of an inclusive digital and experience economy, connecting communities and creating opportunities for investment in tourism, leisure and placemaking.



Sectors with strong growth momentum:

A number of emergent sectors are gaining prominence and demonstrate strong future growth potential:

- **Agri-tech and high-value food production:** Building on South West Wales’ strong rural agricultural base and fast adoption of agri-tech advanced technologies; longstanding links to UK food supply chains continue, illustrated by Pembrokeshire Creamery recently becoming Wales’ first “grass-to-bottle” milk production unit.
- **The creative and digital sector:** Supported by strong 5G connectivity and a growing CreaTech ecosystem, the region benefits from university-led innovation, a vibrant arts and production scene, and demand from film, TV and media companies such as Tinopolis. South West Wales’ robust digital infrastructure and active tech community underpin a strategy focused on innovation, connectivity and digital inclusion.



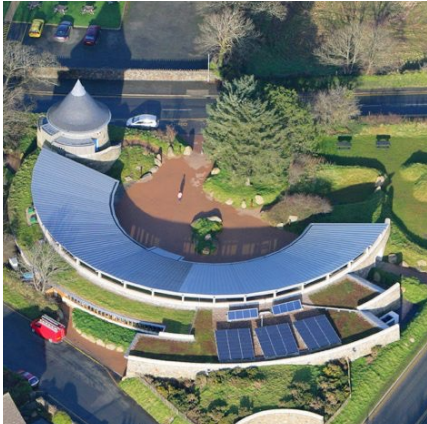
Investment Pipeline Overview

A £6 billion pipeline for prosperity

This prospectus presents a selection of the high-value investment propositions designed to unlock significant untapped potential and deliver compelling total returns over the short, medium and long term.

South West Wales CJC has identified over £6 billion in investable opportunities across its priority growth sectors. Featuring a blend of critical infrastructure, cutting-edge innovation, major regeneration projects and resilience-focused programmes, these propositions highlight a region with both scale and diversity for investors.

The propositions that follow represent a cross-section of the pipeline. They illustrate the types of interventions that are emerging across the region and the breadth of potential investment pathways, from early-stage concepts to more advanced, delivery-ready proposals.



Oriel y Parc Flagship Discovery Centre

Location
Oriel y Parc, St Davids, Pembrokeshire

Promoter
Pembrokeshire Coast National Park Authority

Contact
Tegrynj@pembrokeshirecoast.org.uk

Scale of investment
£2,000,000

The Opportunity
The reimagined Oriel y Parc will be a low-carbon gateway to the Pembrokeshire Coast National Park, bringing people, culture and nature together. In partnership with Amgueddfa Cymru, it will showcase national collections alongside dynamic local exhibitions celebrating landscape and Welsh identity.

Designed to exemplify sustainability and decarbonisation, the centre will offer immersive bilingual interpretation and digital experiences that inspire climate awareness and responsible exploration.

As a flagship Discovery Point, it will champion local creativity and enterprise. Fully accessible and adaptable, it will also serve as a civic hub for community learning, collaboration and wellbeing, strengthening connections between people and place.

The Oriel y Parc redevelopment is expected to generate significant economic benefits for Pembrokeshire through increased visitor numbers, spending, and employment.



Pembrokeshire Food Park

Location
Withybush, Haverfordwest, Pembrokeshire

Promoter
Pembrokeshire County Council, Pembrokeshire Creamery

Contact
enquiries@pembrokeshire.gov.uk

Scale of investment
£75million anchor project (with wider Food Park development potential)

The Opportunity
Pembrokeshire Food Park offers a nationally strategic opportunity to expand high-value food manufacturing in Wales, anchored by a £75 million investment from Pembrokeshire Creamery.

Building on its successful launch as Wales' only BRC-accredited milk bottling facility, Pembrokeshire Creamery plans to develop a world-class, highly automated dairy production facility delivering 40,000 tonnes per year of yoghurts, protein drinks and soft cheeses.

The project is backed by a major UK retailer with a 5-year+ supply commitment, ensuring strong commercial demand. By onshoring products currently imported from Europe, the Food Park enables supply-chain resilience, cost stability and lower-carbon production for the UK market.

The proposed facility will operate to best-in-class environmental standards, including closed-loop water systems, fully utilised waste streams and nutrient-balanced farming, creating a sustainable and secure dairy supply chain for over 100 West Wales farms.

With the potential to generate £150-£200 million annual turnover, create 200+ highly skilled jobs, and contribute £1 billion to the regional economy within five years, the Pembrokeshire Food Park represents one of the most compelling agri-food investment opportunities in Wales.



Milford Haven CO₂ Project – Non-Pipeline Transport Carbon Capture and Storage

Location
Milford Haven Waterway, Pembrokeshire

Promoter
RWE and Dragon LNG

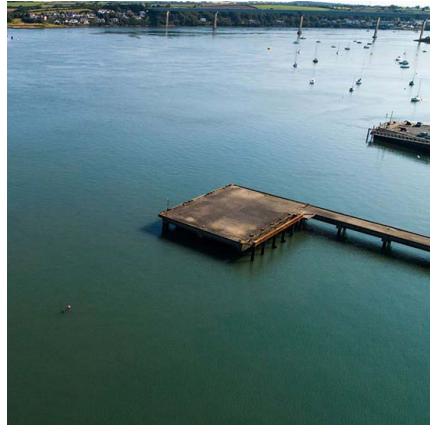
Contact
milfordhavenco2project@dragonlmg.com

Scale of investment
Approximately £50 million of development expenditure could lead to £1bn+ of capital expenditure

The Opportunity
The Milford Haven CO₂ project is a carbon capture and shipping project for Wales and the United Kingdom. It has the potential to capture up to 5 million tonnes of CO₂ per year with first capture from the early 2030s, helping reduce carbon emissions and supporting the UK target towards net zero. It involves a full value chain from carbon emitters to offshore permanent storage, ensuring the safe transport and storage of CO₂.

The founding partners RWE and Dragon LNG are working with Shell and the Scottish Cluster Acorn project. This collaboration leverages advanced engineering and existing expertise to support a sustainable future for Wales and the wider United Kingdom.

The project offers a rare opportunity to participate in a scalable, long-term infrastructure platform backed by an emerging UK CO₂ transport and storage economy, underpinned by the decarbonisation needs of South Wales' £6bn industrial cluster. With deep-water port advantages and co-location heat efficiencies at Dragon LNG, the Milford Haven CO₂ Project represents a nationally strategic investment with significant potential for expansion as UK and EU carbon markets mature.



Marine Energy Test Area (META)

Location

Milford Haven Waterway,
Pembrokeshire

Promoter

Pembrokeshire Coastal Forum
CIC (PCF)

Contact

beth.williams@
pembrokeshirecoastalforum.org.uk

Scale of investment

£0.7 million

The Opportunity

The Marine Energy Test Area (META) is Wales' national test centre for marine renewable energy technologies, operated by Pembrokeshire Coastal Forum CIC. Located within the Milford Haven Waterway, META offers eight pre-consented, fully characterised real-sea sites for testing at Technology Readiness Levels (TRL) 4-7. It enables rapid, low-risk, and cost-effective testing of wave, tidal and floating offshore wind components, helping to de-risk innovation and accelerate technology development.

Since 2021, META has delivered 14 deployments, generating 73 months of site occupancy and attracting >£10 million of R&D spend to Wales. The facility underpins national clean energy priorities, supporting research, supply-chain growth, and skilled employment.

Investment will secure META's long-term operation, expand test capability, and strengthen Pembrokeshire's position as a leading innovation hub alongside Pembroke Dock Marine and the Celtic Freeport.

For investors, META offers a highly leveraged opportunity: accelerating technology commercialisation, anchoring supply-chain activity, and driving clean-energy innovation at the heart of one of the UK's most strategically important offshore renewable regions.



Cwm Gwyrdd Nantycaws (Circular economy hub)

Location

Nantycaws Carmarthen,
Carmarthenshire

Promoter

Carmarthenshire County Council

Contact

sean.gallagher@
cwmnvironmental.co.uk

Scale of investment

£250 million

The Opportunity

Cwm Gwyrdd Nantycaws is an 84ha strategic site on the A48, just 15 minutes from the M4 and on the key transport corridor serving West Wales' energy sector and ports. The vision is to create a self-sufficient, low-carbon hub powered by on-site solar generation, battery storage and emerging technologies such as hydrogen.

A new state-of-the-art Resource Recovery Facility opening in 2025 will significantly expand regional capacity to produce high-quality recycled commodities. This will anchor a Circular Economy Manufacturing Zone, providing space for green innovation, advanced materials reuse and sustainable product development.

The masterplan also includes 30,000 sq ft of modern light-industrial space for SMEs, a large-scale EV charging network for commercial and public use, and an R&D hub in partnership with regional universities. The site will support skills, training and research aligned with the growing green economy.



Bremenda Isaf (Demonstrator farm and food infrastructure hub)

Location

Llanarthe, Carmarthenshire

Promoter

Carmarthenshire County Council

Contact

acook@carmarthenshire.gov.uk

Scale of investment

£12 million

The Opportunity

Bremenda Isaf presents a unique opportunity to invest in a flagship demonstrator farm and regional food-system innovation hub at the heart of South West Wales' growing green economy. The £5m development will transform a strategically located County Farm into a multi-functional, low-carbon Food Innovation Centre of Excellence; bringing together regenerative agriculture, local food processing, aggregation, and skills development.

The project will deliver modern food-grade infrastructure, renewable-energy-powered facilities, and a central hub to scale local supply chains, strengthen SME productivity, and reduce carbon emissions. A dedicated Skills Academy will train the future workforce in horticulture, agri-tech, food manufacturing and logistics, supporting regional employers and boosting community resilience.

As demand for sustainable, locally produced food surges, Bremenda Isaf will act as a replicable model for Wales. This will unlock new markets, enable public-sector procurement of local produce, and create long-term economic, environmental and social value across the region.



Pentre Awel – Future Phases

Location

Llanelli, Carmarthenshire

Promoter

Carmarthenshire County Council

Contact

PentreAwel@carmarthenshire.gov.uk

Scale of investment

Up to £219 million

The Opportunity

Pentre Awel is a £219M, 83-acre health innovation campus along the Millennium Coastal Path.

As the anchor project of Swansea Bay City Deal, blending NHS, university research, entrepreneur zones, assisted living and wellness infrastructure, all in one connected, sustainable destination.

Pentre Awel is designed to integrate leisure, business, health, research, education, assisted living and hotel facilities in one location. Based around a Work-Learn-Live-Play concept, Pentre Awel will create a unique 'ecosystem' for health and life sciences across 4 developable zones:

- Zone 1 (Canolfan): Leisure, education, research, healthcare and business development facilities.
- Zone 2: Nursing/residential home, extra care and assisted living
- Zone 3: Assisted living and business development facilities
- Zone 4: Hotel and Housing

As a mixed-use development, Pentre Awel offers opportunities across multiple sectors. Carmarthenshire County Council welcomes expressions of interest from developers, investors, operators and businesses.



City Waterfront

Location

Swansea Bay

Promoter

Swansea Council and Urban Splash

Contact

invest@swansea.co.uk

Scale of investment

£170+ million

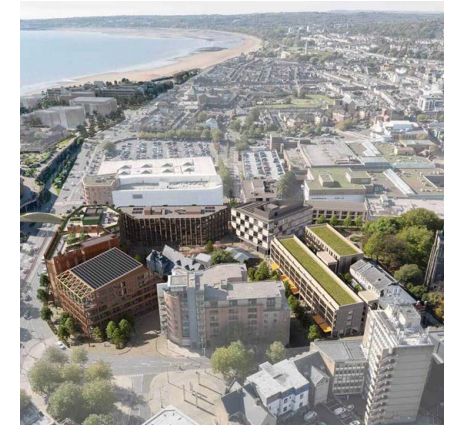
The Opportunity

A brand new waterfront destination designed for residents and visitors to gather, unwind and enjoy the sweeping panorama of Swansea Bay. Forming a natural extension of the city centre, the scheme sits at the culmination of the newly created Ffordd I'r Môr ("Route to the Sea"), a major new pedestrian and cycle-friendly route that links the heart of the city and the Arena directly with the beach.

At its core, the reimagined Civic Centre becomes a striking focal point, transformed into a vibrant mixed-use anchor that sets the tone for the entire district. This landmark building will sit within a lively new neighbourhood animated by places to eat, drink, shop and socialise, supported by 150,000 sq ft of high-quality commercial space and up to 600 new homes offering exceptional coastal living.

Across the waterfront, new cafés, bars and independent retailers will activate the ground floors, spilling out onto generous terraces and promenades that overlook the shoreline. The wider mix introduces modern workspace, an aquarium, hotel accommodation and flexible events space, each adding to a rich and dynamic year-round destination.

This is a distinctive and inclusive coastal quarter where the city truly meets the beach, creating a unique environment that blends urban energy with relaxed seaside living and offering a compelling draw for residents, businesses and visitors alike.



Porth Copr

Location

Swansea City Centre

Promoter

Swansea Council and Urban Splash

Contact

invest@swansea.co.uk

Scale of investment

£150 million (total construction value)

The Opportunity

A transformative £150M regeneration delivering a vibrant mixed-use quarter with up to 400,000 sq ft of Grade A offices, flexible workspace, residential, leisure, and retail; all positioned alongside the landmark Swansea Arena.

Porth Copr is a modern office and learning campus at the heart of a thriving city centre, just minutes from the beach. Designed by leading UK architects, it introduces high-quality office and commercial space across a series of distinctive buildings arranged around new landscaped public realm overlooking a historic city-centre church. The scheme brings together education providers, creative studios, cafés, and restaurants that animate the route to the Arena, creating a lively and connected destination.

A next-generation workspace for ambitious businesses looking to be part of Swansea's ongoing transformation.



Swansea Energy & Transport Hub and Port Development

Location

Prince of Wales Dock and Fabian Way area, Swansea

Promoter

Swansea Council, DST Innovations, and Batri Ltd

Contact

invest@swansea.co.uk

Scale of investment

£4 billion

The Opportunity

The Swansea Energy & Transport Hub and Port Development offers a major investment opportunity at the heart of a rapidly expanding green economy cluster. Centred around the SA1/Prince of Wales Dock and Fabian Way corridor, the project brings together large-scale renewable energy generation, hydrogen and battery technologies, and low-carbon transport infrastructure to create a fully integrated clean-energy ecosystem. The hub aims to be one of the UK's largest multi-modal decarbonised transport centres, combining EV and hydrogen refuelling, public-transport services, active-travel facilities and supporting amenities.

Alongside this, the port-side location enables significant industrial and commercial growth, including advanced manufacturing, tidal lagoon & energy innovation, and logistics linked to Swansea's established maritime assets. With land agreements progressing and strong public-private leadership Swansea Council and development partners including Swansea University, the project represents an early-stage opportunity to anchor long-term value in energy generation, transport services, supply-chain expansion, and regeneration-led economic growth aligned with national net-zero priorities.



Centre for Integrative Semiconductor Materials

Location

Swansea University Bay Campus

Promoter

Swansea University and Universities Wales

Contact

cisminfo@swansea.ac.uk

Scale of investment

Seeking strategic partners and co-location

The Opportunity

The Centre for Integrative Semiconductor Materials (CISM) at Swansea University is a £55 million joint investment by the UK and Welsh Governments and industry, providing a world-class facility for semiconductor research, innovation and commercialisation. Operating as an industrial-scale pilot foundry, CISM bridges academic discovery and advanced manufacturing, driving growth across the South Wales CSconnected Cluster.

Working alongside anchor partners including Vishay, IQE, KLA SPTS, Microchip, the Compound Semiconductor Applications Catapult and Cardiff University's Institute for Compound Semiconductors, CISM forms part of Europe's first compound semiconductor cluster, an integrated ecosystem spanning R&D, wafer fabrication, device development and manufacturing.

CISM is seeking strategic partners and co-investors to expand fabrication capability, scale translational R&D and accelerate commercial deployment.



Waterfront Strategic Sites – Port Talbot & Swansea Bay Investment Zone

Location

Prime industrial and clean-energy development land along the Port Talbot–Swansea Bay coastal corridor, including Bae Baglan, Harbourside, Tata surplus estate, ABP Port Talbot (Celtic Freeport Tax Site) and ABP Swansea.

Promoter

Neath Port Talbot Council, Welsh Government, Associated British Ports, Tata Steel UK

Contact

i.williams4@npt.gov.uk & cathy.hall@abports.co.uk

Scale of investment

£1bn+ programme, with £140m already committed.

The Opportunity

The Waterfront Strategic Sites represent one of the UK's most significant opportunities for private capital in clean energy, advanced manufacturing and industrial decarbonisation. Their location within or near the Celtic Freeport provides planning advantages, tax incentives and deep-water port infrastructure, creating a strong platform for long-term, infrastructure-scale investment.

ABP Port Talbot is positioned as the UK's flagship Floating Offshore Wind (FLOW) integration port for the 4.5 GW Celtic Sea market, opening opportunities in port infrastructure, fabrication, assembly, and logistics.

Additional ventures include a sustainable aviation fuel plant, large-scale hydrogen production and a CO₂ export terminal.

Complementary sites at Bae Baglan, Harbourside and Tata surplus land provide expansion areas for cleantech manufacturing, R&D facilities, innovation clusters and high-spec industrial premises, backed by strong occupier interest.



Wildfox Resorts – Afan Valley

Location

Afan Valley Neath Port Talbot

Promoter

Neath Port Talbot

Contact

tom@wildfoxresorts.com

Scale of investment

£174 million (Phase One)

The Opportunity

Wildfox Resorts is redefining British hospitality through the creation of the UK's first next-generation adventure and wellness resort, high octane thrills meet deep restoration, located in the heart of Afan Valley, South Wales.

Set across more than 1,300 acres in the Afan Valley, Phase One of this flagship resort represents a £174 million investment opportunity to create a premium resort comprising of 300 high-quality lodges, an integrated adventure hub, wellness facility, F&B village, retail, and core infrastructure.

With detailed planning permission secured, ecology nearly complete and enabling works started, Wildfox is in an advanced pre-delivery stage, backed by leading partners in investment, design, engineering and operations. The resort addresses a clear UK market gap: large-scale, experience-rich hospitality combining outdoor adventure, immersive wellness and premium accommodation, a sector with proven demand and resilient year-round occupancy.

Wildfox will be a bold new destination for South Wales, delivering huge regional impact by attracting visitors, building skills, creating jobs, and bringing pride of place to the valley.



Global Centre of Rail Excellence

Location

Coelbren

Promoter

GCRE Limited (Welsh Government)

Contact

simon.jones@gcre.wales

Scale of investment

£250 million

The Opportunity

The Global Centre of Rail Excellence (GCRE) will be a world class rail and energy innovation facility currently being developed at the northern end of the Dulais Valley in Neath Port Talbot.

GCRE will provide unique-to-Europe research, development and showcasing capabilities for the rail and green mobility industry including testing of rolling stock, infrastructure and cutting-edge new sustainable transport technologies. It will also provide world class R&D infrastructure to support renewable energy generation and innovation.

GCRE is located on a 700-hectare site – equivalent to the size of Gibraltar – and will be the UK's first net zero in operation railway. The facility will feature two 7km electrified rail test loops for continuous testing of rolling stock and infrastructure, helping to speed up the development of new rail and mobility products and exports. GCRE will be critical in the development and testing of new innovations that can support decarbonisation and the path to net zero not just here in the UK, but across Europe, the Middle East and beyond.

Investing in South West Wales means investing in a region with the ideal balance of scale, ambition, and opportunity. The area is compact enough to enable strong partnerships and rapid delivery, yet strategically significant enough to generate industry leading return on investment. With its mix of vibrant urban city and towns, innovative industries, and world-class natural assets, South West Wales offers a unique environment where businesses can thrive.

Investor engagement & contact

You can view more detail and more interactive content at the web address:

southwestcjc.gov.wales/investment-opportunities

If you are interested in any of the material or have questions about this investment prospectus, please contact: **southwestcjc.gov.wales/connect**

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