

TRADE & INVEST | *Good businesses do their best work in Wales*

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THIS IS WALES

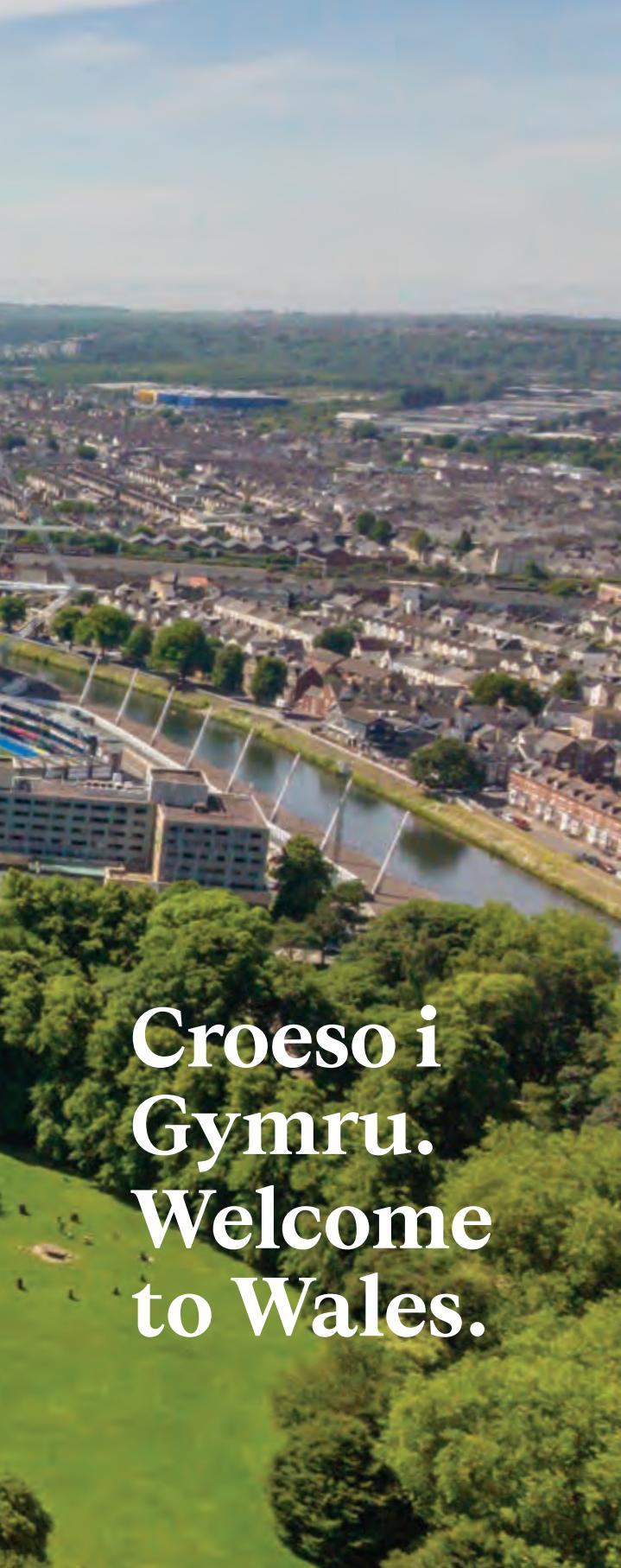


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Llywodraeth Cymru
Welsh Government

Brought to you by the Welsh Government
Driving innovation, investment and opportunity in Wales



Croeso i Gymru. Welcome to Wales.



Cymru | Wales is a nation that has always looked outward, with confidence, purpose, and creativity – whilst being open and welcoming to businesses from across the globe.

For generations, our industries have reached far beyond our borders, from coal and steel to semiconductors and screen production. That global vision remains at the heart of who we are today. Wales is continuing to build strength in industries that are shaping the world; sectors that power the technology, creativity, and innovation that will define the next century.

We are home to Europe's leading compound semiconductor cluster, pioneering the materials that drive electric vehicles, 5G communications, and smartphones worldwide – in all likelihood your phone is probably carrying Wales made technology. Our advanced manufacturers design and build components for aerospace, defence, and low-carbon transport.

Our creative industries export award-winning TV, film, and digital content to audiences across the globe. In every field, from fintech to clean energy, from cyber security to health innovation, Wales is leading the charge for change.

Wales' international strategy reflects this shared ambition. We recognise that prosperity and well-being are inseparable, and that meaningful engagement with the world helps secure both. Our approach to trade and investment is guided by the principles of collaboration, innovation, and sustainability.

Our devolved government works hand in hand with industry and academia to deliver results. Together, we are creating sustainable, high-value growth with tangible benefit to individuals, communities, and future generations alike.

Economic growth and quality job creation is my government's top priority, for everyone in Wales, growth must always have purpose. We are committed to delivering opportunity that endures, underpinned by fairness, environmental responsibility, and the Well-being of Future Generations Act, which shapes every aspect of how we plan, invest, and deliver.

As you connect with our people and explore our ideas, I invite you to see Wales not just as a location for investment, but as a partner for lasting prosperity.

Cymru fel partner.

Y Gwir Anrh/The Right Hon Eluned Morgan
Prif Weinidog Cymru/First Minister of Wales



WALES. INVESTED.



Wales is its own country within the UK. Our devolved government provides easy access to decision makers.



As part of the UK – and its market of 69 million people – Wales offers a business-friendly environment to expand, trade and invest.



There's plenty of talent here, with over 275,000 students in full and part-time education in our eight universities and 13 further education colleges.



The Welsh Government can support international business via a network of 21 offices in 12 countries, delivering insight through local knowledge, expertise and connections.



Industrial property here is among the most affordable in the UK. Office rents in our capital, Cardiff, are the lowest for any major city in the UK, and commercial property costs around 40% of London prices.

Wales is a nation that believes in bold ideas, brilliant people and building a better future. It's a place where businesses don't just grow – they flourish. With a spirit of innovation and a culture of collaboration, Wales offers everything an ambitious investor or entrepreneur needs to succeed.

Here, talent runs deep. Our universities and colleges work hand-in-hand with industry to shape a skilled, loyal and future-ready workforce. Whether you're pioneering in life sciences, fintech, advanced manufacturing or creative industries, you'll find the expertise and energy to drive your vision forward.

Innovation is in our DNA. Wales is home to world-leading tech clusters – from compound semiconductors and cyber security to green energy and AI. We're agile, inventive and globally connected, with a thriving ecosystem that turns ideas into impact.

Support in Wales is personal, proactive and purposeful. The Welsh Government and Development Bank of Wales offer tailored funding, fast decisions and hands-on guidance. We don't just welcome business – we champion it.

And then there's the lifestyle. Wales offers a rare balance: vibrant cities, stunning coastlines, national parks and a strong sense of community. It's a place where wellbeing matters, where short commutes and affordable living help attract and retain

top talent who want more than just a job – they want a life.

Our economy is diverse and resilient, with strengths across aerospace, creative industries, clean energy and more. This variety fuels innovation and opens doors to new partnerships and supply chains.

Wales is connected – physically and digitally. With excellent transport links to London, Europe and global markets, plus strong digital infrastructure, we're ready for the future of work and trade.

And underpinning it all is a bold, world-leading commitment to sustainability and long-term thinking. The **Well-being of Future Generations Act** is unique to Wales – a pioneering piece of legislation that challenges public bodies to make decisions that benefit not just today, but tomorrow. It's a framework that's inspiring businesses to align with seven national well-being goals – from prosperity and resilience to equality and global responsibility. For investors, it's a powerful signal: Wales is serious about building a future that works – for people and planet.

Above all, Wales is a place where things happen. Where businesses, academia and government work together to make a difference. Where ambition is matched by action. And where your investment isn't just supported – it's celebrated.

This is Wales. Invested.

Across every corner of Wales, investment, innovation, and inclusion are creating a nation where business can grow with purpose. From coastal Freeports to dynamic Investment Zones and the thriving Mid Wales growth corridor, each region combines distinct industrial strengths with a shared national vision for a sustainable and balanced economy.



REGIONAL STRENGTHS

Driving Growth Across Wales

1–Anglesey Freeport *North Wales*

Anglesey Freeport is transforming the north into a global hub for low carbon energy, data/AI, manufacturing, and international trade. Centered around Holyhead Port, Prosperity Park, Parc Cybi, Rhosgoch, and the M-SParc Science Park, the Freeport supports the UK's transition to clean energy through projects in nuclear, hydrogen, and marine renewables. Backed by £25 million in seed funding, it is forecast to generate 5,000 high value jobs across advanced data/technology, logistics, and energy. This strategic location, at the crossroads of the Irish Sea and European trade corridors, demonstrates how North Wales is harnessing innovation to drive sustainable prosperity.

2–Celtic Freeport *South West Wales*

Spanning Milford Haven and Port Talbot, the Celtic Freeport is a flagship clean energy and industrial decarbonisation initiative; it will power the net zero transition through floating offshore wind, hydrogen, sustainable fuels, manufacturing, energy storage and port logistics. The Freeport is expected to create up to 11,500 skilled jobs and attract £8.4 billion in private investment. An Industrial Strategy Zone, strategically located near two deep-water ports, offers excellent rail, road, sea and pipeline connectivity. Supported by highly competitive investment incentives, it features strong workforce development through local training and upskilling initiatives, plus an innovation network linking academia, industry and research centres. The Celtic Freeport exemplifies the Welsh commitment to connecting people, skills and technology in pursuit of a cleaner, stronger economy.

3–Growing Mid Wales *Mid Wales*

Mid Wales is a dynamic region of opportunity – a place where ingenuity meets global ambition. The region is accelerating growth across agri-food and agri-tech, advanced manufacturing, sustainable tourism, clean energy and digital infrastructure. The region is investing heavily in regional assets with £110 million from the Mid Wales Growth Deal unlocking over £300 million in public and private investment. From innovation campuses and enterprise hubs to skills and innovation launchpads, Mid Wales offers a connected landscape for innovation, skills and inclusive growth – making it more capable than ever to partner with business to drive sustainable, place-based growth.



Well Connected

North and Mid Wales are well served by their proximity to the large metropolitan areas and international airports of Birmingham, Liverpool and Manchester. Cardiff is served by its own international airport, which connects to main European hubs while London Heathrow can be reached within two hours.

4-Wrexham and Flintshire Investment Zone North East Wales

The North East Wales Investment Zone builds upon a well-established advanced manufacturing region. Focussed on the key strategic sites of Wrexham and Deeside Industrial Estates, Warren Hall and land surrounding Hawarden Airport, it benefits from £160 million in joint UK and Welsh Government funding to accelerate research, productivity, and job creation. Airbus, Toyota, JCB, AMRC and many others are advancing next generation processes in aerospace, automotive, and low carbon technology. The area is also supported by the North Wales Growth Deal and is enhancing export infrastructure and supply chain capabilities that reach into North West England and Europe. This vibrant industrial heartland is a model of cross border connectivity, flexibility, and ambition.

5-Cardiff and Newport Investment Zone South East Wales

Home to one of the UK's most concentrated innovation ecosystems, South East Wales leads the way in Advanced Manufacturing and Digital & Data. Cardiff and Newport form the gateway to the unique Compound Semiconductor Cluster and connect major academic, public, and private research institutions to commercial opportunity. A joint UK and Welsh Government initiative, delivered by Cardiff Capital Region, this Investment Zone is accelerating growth in R&D and innovation. With a focus on sustainable development and inclusive prosperity, South East Wales is a magnet for international investment.

Wales' Advanced Manufacturing Sector at a Glance

- 5,775 Manufacturing enterprises in Wales.
- Wings for the Airbus A320, A330, and A350 are made in Wales.
- £14bn+ manufacturing export value in 2023.
- 150,000 employed across the sector.
- Space Forge is utilising Low Earth Orbit as the ultimate manufacturing space from its HQ in Cardiff.



ENGINEERED FOR SUCCESS





“Wales’ Manufacturing sector is significant in size and leads the way in innovation and collaboration across the UK, consistently exceeding expectations.”

Jacqui Murray,
Director, South Wales HVM Catapult



Wales is a leader in advanced manufacturing, combining aerospace, automotive, defence, rail, space, and materials heritage with a forward-thinking approach in robotics, smart machining, and sustainable design – supported by strong supply chains and close industry – academia collaboration.

Welsh manufacturing supplies the world – exporting everything from high-performance aircraft wings to medical devices and precision electronics. Recognised as a leading centre for advanced manufacturing the UK and Europe, Wales builds on a foundation of innovation, technical expertise and decades of proven delivery.

In North Wales, Broughton, is home to Airbus, one of the world’s foremost aircraft manufacturers producing wings for global fleets, which supports

thousands of skilled jobs and ongoing investment in automation and digital manufacturing.

AMRC Cymru, part of the University of Sheffield, accelerates next-generation materials research and smart factory technologies, offering collaborative R&D and advanced skills training for Welsh businesses.

Manufacturing excellence is driven by leading companies including CAF, Aston Martin, Toyota, General Dynamics, and GE Aerospace Wales, supported by a spectrum of innovative SMEs ensuring supply chain sustainability.

The sector’s adaptability has enabled successful pivots into electrification, lightweight components, and green technologies, positioning Wales to serve future mobility and sustainability markets.

- £47bn of investment potential identified from onshore and offshore renewables over the next decade.
- The renewables sector supports almost 8,000 highly-skilled jobs, with average salaries 26% above the national average.
- At 35km², Morlais, on Anglesey, is the largest consented zone for the development of tidal energy in the world.
- 726MW: Wales' offshore wind power from three projects in the Irish Sea: North Hoyle, Rhyl Flats, and Gwynt-y-Môr.



POWERING TOWARDS A GREEN FUTURE

From floating offshore wind in the Celtic Sea to Europe's largest tidal energy project in North Wales, Wales leads innovation in marine, solar, wind, hydrogen, and battery technologies.

Major public and private funding powers green city and regional deals in Swansea, North Wales and beyond, connecting research, advanced manufacturing, and deployment.

New projects that support the race to net-zero and economic growth through Freeport status set out the ambitious path to national decarbonisation and export success and aim to collectively create around 20,000 jobs by 2030.

Wales offers tailored investment support, sector strategies, and skills development to help businesses create local jobs and supply chain resilience, while meeting global sustainability goals.

Real-World Impact: Projects and Places

- Morlais Tidal Energy Project (Anglesey): Europe's largest consented tidal energy site, attracting international developers and leading environmental monitoring.
- Celtic Sea Floating Offshore Wind: A pipeline of projects set to deliver 4.5 GW by 2035, with ports and supply chains gearing up for mega-structure assembly and export.
- Pembroke Dock & META: Home to the Marine Energy Test Area, where new technologies are tested and deployed, and a gateway for floating wind and tidal projects.
- Port of Mostyn & Holyhead: Proven track record in turbine installation, O&M, and logistics, with new investments unlocking future capacity.



“Wales is uniquely positioned to be a leading country in the transition to net zero, and this green industrial evolution, because it already has a very strong industrial heritage.”

Ben Burggraaf,
CEO, *Net Zero Industry Wales*

Wales' Compound Semiconductor Sector at a Glance

- Over £500 million invested by public and private sector partners since 2020.
- Supports around 3,000 high-value jobs, doubling since 2017.
- Delivers more than £350 million GVA per year to the Welsh economy directly and indirectly.
- The sector's cutting-edge R&D and university-industry partnerships have attracted £43 million from the UK Government Strength in Places Fund and leveraged £589 million in additional investment.
- Cardiff and Swansea universities feed the cluster with world-class talent supporting over 20 collaborative innovation programmes annually.



A NEW INDUSTRIAL REVOLUTION

“The cluster’s strength is in its connectedness. We’re not just co-located; we’re co-creating. That’s what allows us to lead on the global stage.”

Howard Rupprecht,
CSconnected



Compound semiconductors are at the heart of a new industrial revolution enabling the advanced technologies that power our everyday lives. From smartphones and electric vehicles to satellites and renewable energy systems, these materials make modern innovation possible.

Home to the world's first compound semiconductor cluster, CSconnected, South Wales brings together world-class research, design, and manufacturing capabilities in one unique ecosystem.

Building on more than four decades of expertise, the Welsh cluster brings together a globally distinctive ecosystem that integrates research, design, and manufacturing in one place. Anchored by major companies such as Vishay, IQE, KLA's SPTS Technologies, and Microchip, and supported by an equally dynamic network of innovative SMEs including Microlink Devices, Novomorphic and Kubos, this close collaboration between industry, academia and government positions Wales as an intrinsic location in a multi billion pound global market, driving progress in communications, healthcare, transport, defence, and beyond.

The cluster currently contributes over £400 million in GVA to the UK economy, supports around 3,000 jobs, and continues to

expand through sustained private investment. Recent milestones include Vishay Intertechnology's £250 million investment in a new Newport facility, and the establishment of Novomorphic, a new semiconductor design centre in Cardiff, created in partnership with CSA Catapult, Cadence Design Systems, and the Welsh Government.

Research excellence underpins every stage of development. Cardiff University's Institute for Compound Semiconductors, Swansea University's Centre for Integrative Semiconductor Materials, and the Compound Semiconductor Applications Catapult collaborate across R&D and training, ensuring that Wales leads not only in production but also in innovation and talent. A robust supply-chain expansion programme, co-funded through Cardiff Capital Region and CSconnected, is now enabling further collaboration with advanced manufacturing, aerospace, and communications.

At the heart of this success lies a national vision to position Wales as a global leader in enabling technologies for a sustainable future. By providing the materials that make modern life possible, from energy-efficient chips to radar systems and medical sensors, compound semiconductors made in Wales are shaping cleaner mobility, faster communication, and smarter living across the globe.



- Over 3,500 businesses operate in the creative sectors supported by Creative Wales.
- Over 35,000 people are now employed within Creative Wales priority sectors.
- Wales has become one of Netflix's key production hubs, and has been the filming location for iconic shows such as *Sex Education*, *The Crown*, *The Witcher* and *HAVOC*.
- Spot Wales on location in *Sherlock Holmes*, *Industry*, *House of the Dragon*, *James Bond*, *Harry Potter* and many more!



A CREATIVE BOOM

The creative industries in Wales are a thriving, high-growth success story. From global blockbusters shot against the backdrop of our beautiful scenery and in the country's renowned studios, to chart-topping games and cutting-edge animation, through to talented and inspiring musicians, Wales has a reputation for turning creative ambition into international achievement.

Our most prominent studio facilities include Wolf Studios, Great Point Studios, Dragon Studios and Aria Studios, all offering first-class sound stages,

backlots and post-production suites and all with a track record of housing major productions, often with the support of the Welsh Government via Creative Wales.

Welsh games studios continue to innovate and impress. Small independent studios like Wales Interactive are making waves globally, with their chart-topping and award-winning zombie thriller *Sker Ritual*; Sugar Creative was chosen by industry leaders, Ubisoft, to create an educational mobile experience to complement the renowned *Assassin's Creed Mirage*, while US back-end Games company, Rocket Science,

recently chose Cardiff as the location for its European HQ.

We are committed to nurturing talent, supporting creative businesses and encouraging the creation of high-quality content that stands tall among other countries. Not only is the industry an important economic driver for Wales, but we are fostering and upskilling the next generation of creatives by incentivising training and apprenticeship opportunities for our young people, ensuring Wales continues to be a place to enjoy a successful, sustainable career.



“We've got these great stage facilities, beautiful landscapes, and this great talent in Wales, which of course – me being Welsh – I was thrilled to see.”

Lynwen Brennan,
Executive VP Lucasfilm

- The life sciences sector has an approximate turnover of £3.59 billion.
- 300 companies, employing over 13,000 people across the sector.
- Access to anonymised patient data, rapid product development, trials, and commercialisation.
- NHS Wales employs over 99,000 staff and delivers healthcare services through seven Local Health Boards (LHBs), three NHS Trusts and two Special Health Authorities.



SHAPING TOMORROW'S HEALTH

“Our ambition is to position Wales as the UK's central hub for life sciences – where businesses and academics collaborate to accelerate innovation and drive economic growth. We aim to deliver transformative products and services that empower clinicians, improve patient outcomes, and strengthen our health system.”

Cari-Anne Quinn,
Chief Executive, Life Sciences Hub Wales

“The sector is exciting and represents technological advancement, growth, improved healthcare, and an opportunity to do what Wales does best – which is to work together, collaborate and seek success.”

Gwyn Tudor,
CEO, MediWales



Wales offers a uniquely connected life sciences ecosystem, anchored by a dedicated Life Sciences Hub that fosters seamless collaboration between the NHS, industry, and academia. This integrated network empowers organisations to accelerate innovation and bring transformative solutions to market.

With eight leading universities, three medical schools, and a dynamic industry base, Wales is a powerhouse of cutting-edge research and development. Businesses benefit from direct access to NHS clinicians and academic experts, enabling rapid progression from concept to commercialisation.

Collaborative research opportunities abound through partnerships with NHS Wales and specialist institutes such as the All Wales Gene Park, stem cell research centres, and oncology biobanks. Wales also leads in

secure, ethical data access, offering researchers over 10 billion anonymised, person-based data records via the internationally recognised SAIL Databank.

Companies can tap into targeted support to develop and scale disruptive technologies, with skills programmes designed to help businesses recruit top talent, upskill teams, and drive sustainable growth backed by Wales' competitive edge in enabling digital innovation – including cybersecurity, big data analytics, artificial intelligence, and compound semiconductors. Wales is also advancing precision healthcare through Genomics Partnership Wales, which delivers a unified approach to genomics across the NHS. The region boasts deep expertise in MedTech, diagnostics, wound healing, neurosciences, regenerative medicine, and cell therapy – making it an ideal environment for breakthrough innovation.

Wales' Tech and Digital Sector at a Glance

- Wales is home to the number one city in the UK for startup growth.
- A vibrant ecosystem. Wales is home to over 3,500 homegrown and multinational technology companies.
- Wales' tech GVA has grown 26% in the past five years, outpacing the UK average.



EUROPE'S RISING TECH POWERHOUSE

“It's hard to imagine what the world will look like in 15 or 20 years and there's no reason Wales shouldn't be not only part of it but a leading part of it.”

Henry Engelhardt,
Admiral PLC



Fintech



Cyber Security

Technology is no longer a vertical sector that operates in a silo, it's a multi-sector horizontal that has the potential to revolutionise previously ring-fenced sectors.

Defined by agility, innovation, and partnership, Wales is home to one of the UK's most vibrant and fast-growing technology ecosystems. With world-leading expertise in sectors like fintech, compound semiconductors, medtech and cybersecurity, Wales benefits from world-class universities and spinouts that are actively involved in research and development programmes. There's no doubt that this strengthens the sectors that we have here, while collaboration between industry and academia plays an important role in developing the skills and talent required for growth.

With tech hubs across the country, from North to South, Wales is building the digital infrastructure, investment, and talent pipelines that are shaping the industries of tomorrow.

This is a nation where innovation and purpose align, and strong public-private collaborations deliver the ideal testbed for new technologies. The Welsh Government's *Digital Strategy for Wales* and *Innovation Strategy* provide a supportive framework for business growth, ensuring that start-ups, scale-ups, and global brands can flourish in equal measure. From the growth of tech across South Wales, Tech Valleys in Blaenau Gwent and the expansion of fintech, cyber security and a strong tech cluster in North Wales, Wales is enabling businesses to pilot solutions and accelerate R&D at pace.

The sector is also leading the way in emerging tech and innovation with Whisper TV and Tramshed Tech launching the first fully accessible and sustainable virtual production tech hub in Europe, delivering content globally today whilst training the tech entrepreneurs and engineers of the future.

Anchored by success stories, the sector benefits from cutting-edge data infrastructure, including Vantage's ongoing multi-billion pound hyperscale data centre campus spanning multiple sites in South Wales – already one of the largest in Europe – and Microsoft's investment in a next-generation AI data centre in Newport. Together, these developments cement Wales' position as a key driver of the UK's AI and green data economy.

The thriving fintech cluster, led by FinTech Wales, is connecting start-ups with global financial institutions and investors, while initiatives such as the *Cyber Innovation Hub* and *Digital Catapult Wales* are advancing digital security, automation, and smart manufacturing. Wales Tech Week further showcases the industry's global reach, uniting thousands of organisations.

The Welsh tech sector reflects the values of agility, inclusion, and sustainability that define Wales' economic mission. Here, innovation is driven by purpose, developing digital solutions that work for businesses and people alike, from clean energy to public services. This is a nation not only embracing technological change, but shaping it – creating responsible, resilient growth for a connected future.

CAPITAL INVESTMENT PROJECTS



Global Centre of Rail Excellence (GCRE), Neath Port Talbot/ Powys

GCRE is Europe's landmark rail testing, research, and mobility innovation campus. Sited on a reclaimed 700-hectare coalfield, it features the UK's first net-zero operational railway and offers two electrified test loops plus technology park, R&D assets, logistics, and onsite hotel. The centre will create over 1,000 skilled jobs, regeneration in South Wales, and drive major inward investment for rail, energy, and commercial property.

Project Sponsor
GCRE Limited
(Welsh Government owned)

Estimated Investment
£250 million

Sector
Rail, Transport Innovation,
Energy, Commercial Property

Location
Neath Port Talbot/Powys –
South Wales

Pentre Awel, Llanelli

Pentre Awel is a £219m, 83-acre life sciences and health innovation campus along the Millennium Coastal Path. As a featured project of Swansea Bay City Deal, the development blends NHS, academia, research, entrepreneur zones, assisted living, hotel and wellness infrastructure, all in one connected, collaborative and sustainable destination.

Project Sponsor
Carmarthenshire County Council

Estimated Investment
£219 million

Sector
Health, Life sciences, Assisted living, Leisure, Education, and Hospitality

Location
Llanelli

The ARTHUR Programme, Trawsfynydd

Advanced Radioisotope Technology for Health Utility Reactor is a proposed £450m project delivering a world-class research reactor, hot cell processing, and distribution for medical radioisotopes, critical for cancer and cardiovascular health.

Project Sponsor
Welsh Government

Estimated Investment
Potential £450 million (+/- 20%)

Sector
Health, Nuclear Research, Life Sciences

Preferred Location
Trawsfynydd, Gwynedd

A portfolio of ready-to-invest projects that unite transformative infrastructure, future-facing innovation, and regional regeneration. Each flagship Capital Investment Project opens a window on the commitment to sustainable growth, skills development, and commercial opportunity, demonstrating how public-private partnership can leverage real returns and lasting impact.



Porth Copr, Swansea City Centre

A transformative £150m regeneration creating a vibrant mixed-use quarter with up to 400,000 sq ft of Grade A offices, flexible workspace, residential, leisure, and retail alongside Swansea Arena.

Project Sponsor
Swansea Council
(Urban Splash promoting)

Estimated Investment
c.£150 million
(total construction value)

Sector
Commercial Office, Residential (BTR), Mixed-Use Development

Location
Swansea City Centre



Cardiff Parkway

Set to be Wales' most strategically connected business district, Cardiff Parkway offers 200 acres within the Cardiff Capital Region, £5bn Gross Value Added, and a direct rail gateway to Cardiff, Newport, Bristol and London.

Project Sponsor
Cardiff Parkway Developments Limited

Gross Value Added (GVA)
£5 billion GVA

Sector
Transport Led Business District

Location
East Cardiff



Callaghan Square South Side, Cardiff

Over 11.4 acres of city centre land adjacent to Cardiff Central station, this £100m+ mixed-use venture builds on proven commercial success, with scope for 1.3m sq ft across offices, residential, leisure, and retail.

Project Sponsor
Welsh Government & Cardiff Council

Gross Development Value (GDV)
£100 million

Sector
Mixed-use (office, residential, leisure, retail)

Location
Central Cardiff

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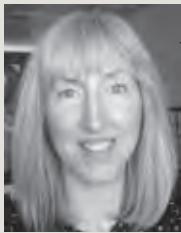
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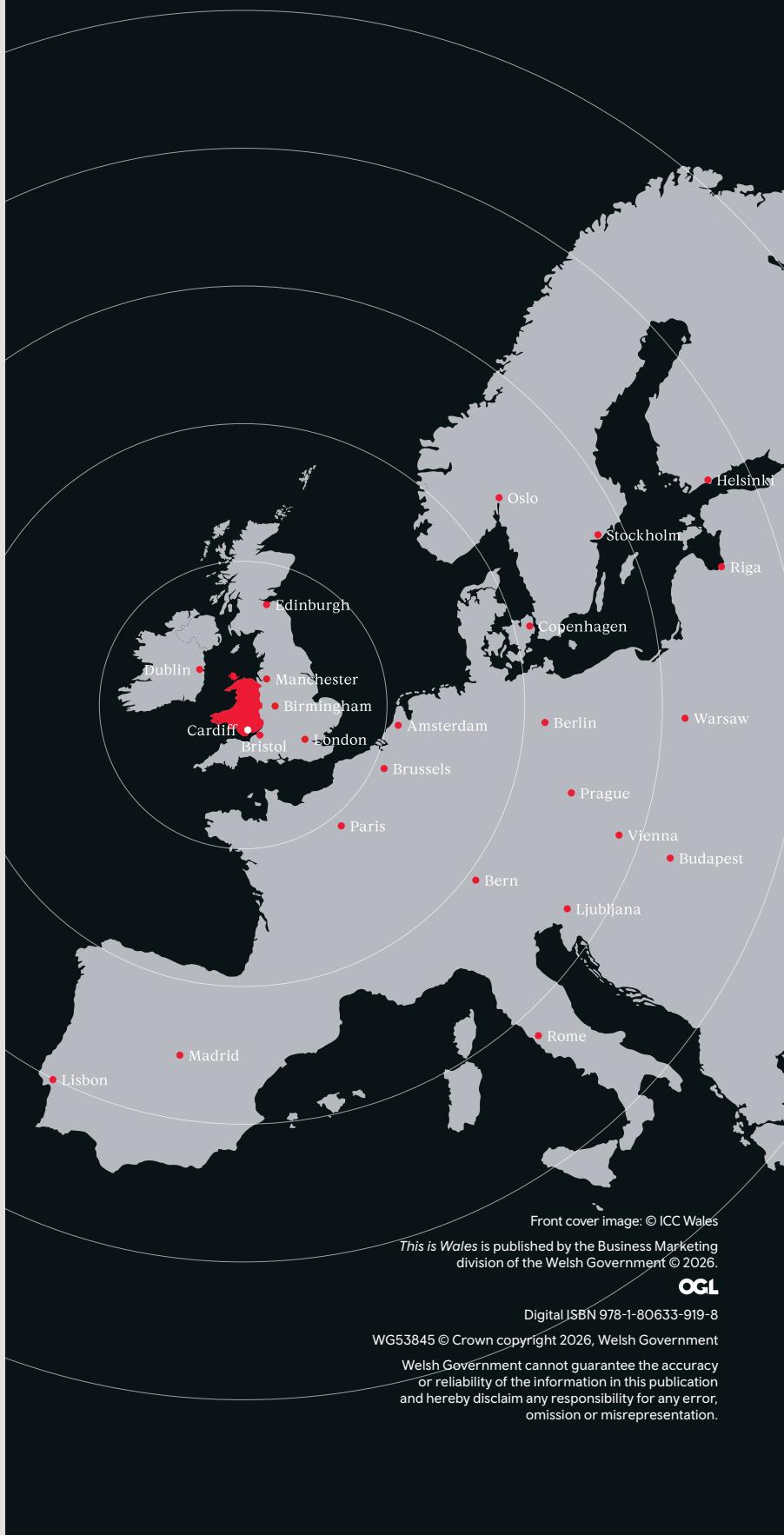
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