

OUR NATURE AMBITION FOR WALES

Section 6 Biodiversity and Resilience
of Ecosystems Duty Report -
April 2023 to end March 2026

January 2025



Navigating this report: guide to key sections and pages

PART ONE - OVERVIEW:

Page 4
About The Crown Estate

Page 5 - 7
Overview of nature recovery approach & Section 6

Page 8 - 9
Aligning our Nature Recovery Ambition with NRAP
and Area Statements

Page 10
Alignment between our Value Creation Framework
and The Well-Being of Future Generations Act

PART TWO - BIODIVERSITY BASELINE AND DESIGNATIONS WITHIN OUR PORTFOLIO:

Page 12
Biodiversity Designations and Habitats and our
Portfolio

Page 13
On Land: Nature Conservation Designations &
Habitats of Priority Importance

Page 14
At Sea: Nature Conservation Designations &
Habitats of Priority Importance

PART THREE - CASE STUDIES:

Page 16 - 25

PART FOUR - HIGHLIGHTS, KEY OUTCOMES & ISSUES:

Page 27 - 28

PART FIVE - ACTIONS ACROSS OUR PORTFOLIO:

Page 30 - 37



PART ONE: Overview

In this part we set out how we are approaching our Section 6 Duty and what we are covering.

We explain some background on The Crown Estate.

We set how we built our Nature Recovery Ambition with stakeholders in Wales and how this aligns with the Nature Recovery Action Plan (NRAP) for Wales and the seven Area Statements.

About The Crown Estate

Set up by an Act of Parliament, The Crown Estate occupies a space between the public and private sectors. We act independently to grow the environmental, social, and financial value of our portfolio for future generations. We also work to address national needs where we are best placed to do so. Our strategy commits us to:

- be a leader in supporting the UK towards a net zero and energy-secure future;
- take a leading role in stewarding the natural environment and biodiversity;
- help create inclusive communities; supporting equality, economic growth and productivity;
- responsibly generate value and financial returns for the country.

In Wales, our holdings include ~28,000 hectares of common land (primarily rough pasture used for grazing), as well as ~65% of the foreshore and tidal riverbed. Our commercial interests include oil and gas pipelines, marine aggregates extraction, telecommunications and power cables. Renewable energy is a significant focus, with ongoing projects including Floating Offshore Wind Leasing Round 5 in the Celtic Sea which could deliver up to 4.5GW which is enough for over 4m homes, and an estimated 5,300 jobs in the supply chain. The land-based aggregate options owned by The Crown Estate are not reflected in the area data, as they are sub-surface.

We need to balance our priorities of decarbonisation and creating social, economic and financial value with the need to protect nature. This is why we are investing in projects such as ECOFlow, which will track the ecological effects of floating offshore wind, helping to make it more sustainable.

For more information about our activities in Wales, please see our [Wales Review](#), which is produced alongside our Annual Report and published in June.



Overview: Our Approach to Nature Recovery in Wales and Section 6 Duty

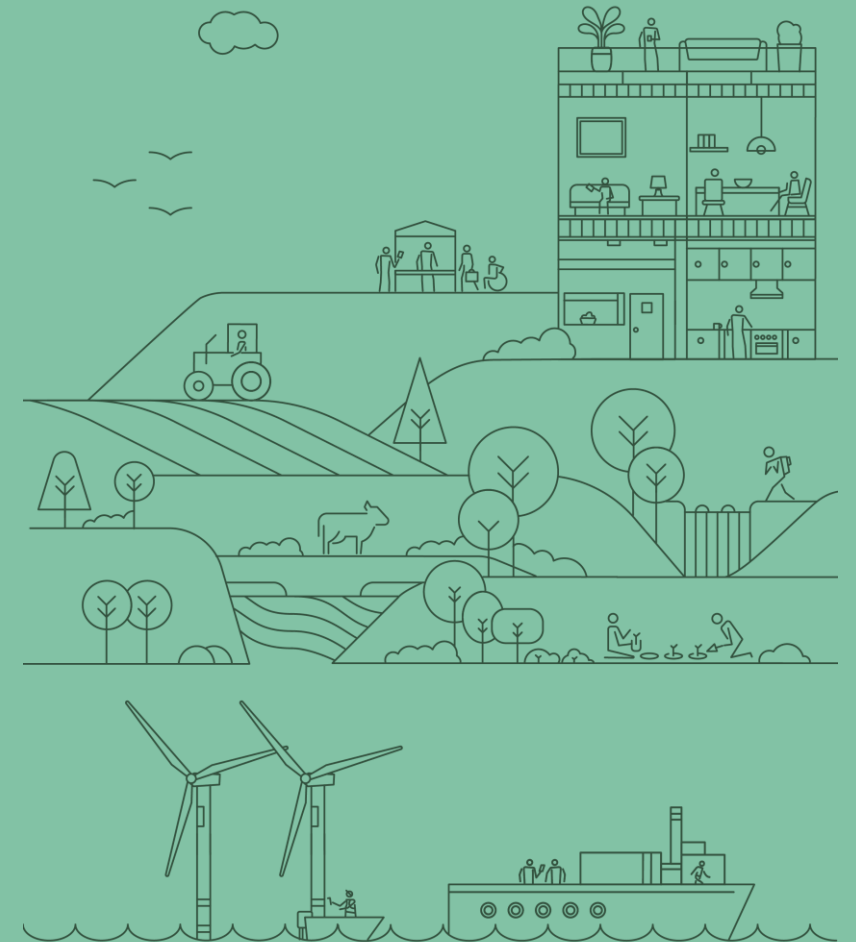
The Crown Estate stewards a significant and diverse portfolio of land and natural resources, including common land and the seabed. Our purpose is 'to create lasting and shared prosperity for the nation' and our strategy commits us to promoting and enhancing biodiversity across Wales.

Under the Section 6 (S.6) Environment (Wales) Act 2016, public authorities in Wales have a duty to enhance biodiversity and ecosystem resilience. This duty requires integrating biodiversity into planning and business activities. Reports should transparently detail actions taken, align with our other organisation reports, and demonstrate progress against the Nature Recovery Action Plan for Wales (NRAP) objectives and themes.

Given our extensive assets, we recognise our significant responsibility towards biodiversity on land and at sea. This report outlines our progress in conserving and enhancing the natural environment. The Crown Estate has developed a comprehensive [Nature Recovery Ambition](#) which was published in October 2024, with a further update in January 2025 and we have now integrated our Section 6 Duty into the same framework. This report covers the period from 2023 to 2026. We will provide our next report in June 2026.

We know that we will only achieve environmental goals by working in partnership, from conservation organisations to communities, and we have engaged with stakeholders to develop our approach in a way that supports wider local and national strategies.

Since the previous reporting period, we have worked to gather information and set a biodiversity baseline for our portfolio, and we aim to keep developing and enhancing this data. We have used our baseline to identify priority areas and taken action, including funding research and piloting projects. Given the significant challenges facing our natural environment, we are mindful that there is much more to do, and we have shared our next steps for further action and improvement. Through these ongoing efforts, we aim to create a positive impact on the natural habitats and species that thrive in Wales.



Overview: Engaging with Stakeholders to develop our Nature Recovery Ambition

Organisations engaged



Wales Coasts and Seas
Partnership (CaSP Cymru)



The steps we have taken

- In May 2024, The Crown Estate conducted interviews with Welsh stakeholders to discuss their understanding and approach to maintaining and enhancing biodiversity and ecosystem resilience in Wales.
- Eleven organisations were interviewed (see box to the left).
- The first objective of the interviews was to raise awareness of the development of our approach to nature recovery, including policy framing, goal and target setting in the Welsh context.
- The second was to discuss and seek input on the opportunities, challenges and recommendations to successfully deliver nature recovery in Wales.
- We also held a stakeholder webinar in July 2024 to present our over-arching nature recovery approach to gain feedback. This was attended by a variety of organisations.
- Several dedicated marine sessions were also held (both with CaSP and bilaterally with interested parties) to ensure we heard from the diverse expert organisations engaged in delivering marine nature recovery.
- We took the themes (on the right) into account during the formulation of our nature approach, goals and commitments, and the subsequent targets published in this report and our nature update. We will be integrating them into their delivery plan in Wales.
- We have continued to build relationships through attending events like The Royal Welsh Agricultural Show, Restoring Welsh Rivers Summit, participating in a Welsh Wildlife Trust event, and contributing to existing partnerships and working groups.

What we have learned

The conversations with stakeholders were positive with all open to work in partnership with the Crown Estate in Wales. These conversations informed our approach to nature recovery including our four commitments:

- **Understanding nature:** The challenges of environmental monitoring and evidence gaps were highlighted in, with an opportunity for The Crown Estate to foster a culture of data sharing between organisations, particularly around spatial mapping and making data public.
- **Designing for nature:** Our stakeholders highlighted the challenge of accelerating seascape and landscape scale projects, with "delivery on the ground" not being considered "in a wholesale approach". They said, "there are lots of projects going on, but the integration of those projects is currently quite weak".
- **Funding for nature:** Many highlighted the gap between ambition and delivery on nature recovery, such as the lack of funding for nature recovery including green financing. There is an opportunity for The Crown Estate to play a role in bridging that gap.
- **Partnering for nature:** There was a significant emphasis on engaging at a very granular, local level, to bring communities along the journey to nature recovery and ensure success with shared accountability.

Overview: The Crown Estate's Nature Recovery Ambition

Our Vision

Nature is flourishing and cared for as one of UK's most precious assets.

Our Approach

Joined-up action on land and at sea to restore nature and create lasting benefits for people, climate and the environment.

Commitments

We have four commitments which set out how we deliver our goals: to understand nature, design for nature, partner for nature and fund nature.

Goals

We have set three goals for nature recovery to drive everything we do across our business. The goals underpinning our vision and approach are aligned with domestic and global ambitions for nature recovery, helping to halt nature's decline by 2030 and contributing to nature's recovery by 2050. This Section 6 Duty Report focuses on goal one.

1. Deliver increased biodiversity
2. Protect and restore freshwater, marine and coastal systems
3. Increase social and well-being benefits from nature

Targets, Key Performance Indicators and Actions

Under our Nature Recovery Ambition, we have developed targets, KPIs and actions [see pages 30 - 31] to ensure focused and transparent delivery. These will ensure that The Crown Estate contributes to the NRAP objectives and follow the ways of working set out in the Well-being of Future Generations (Wales) Act 2011.

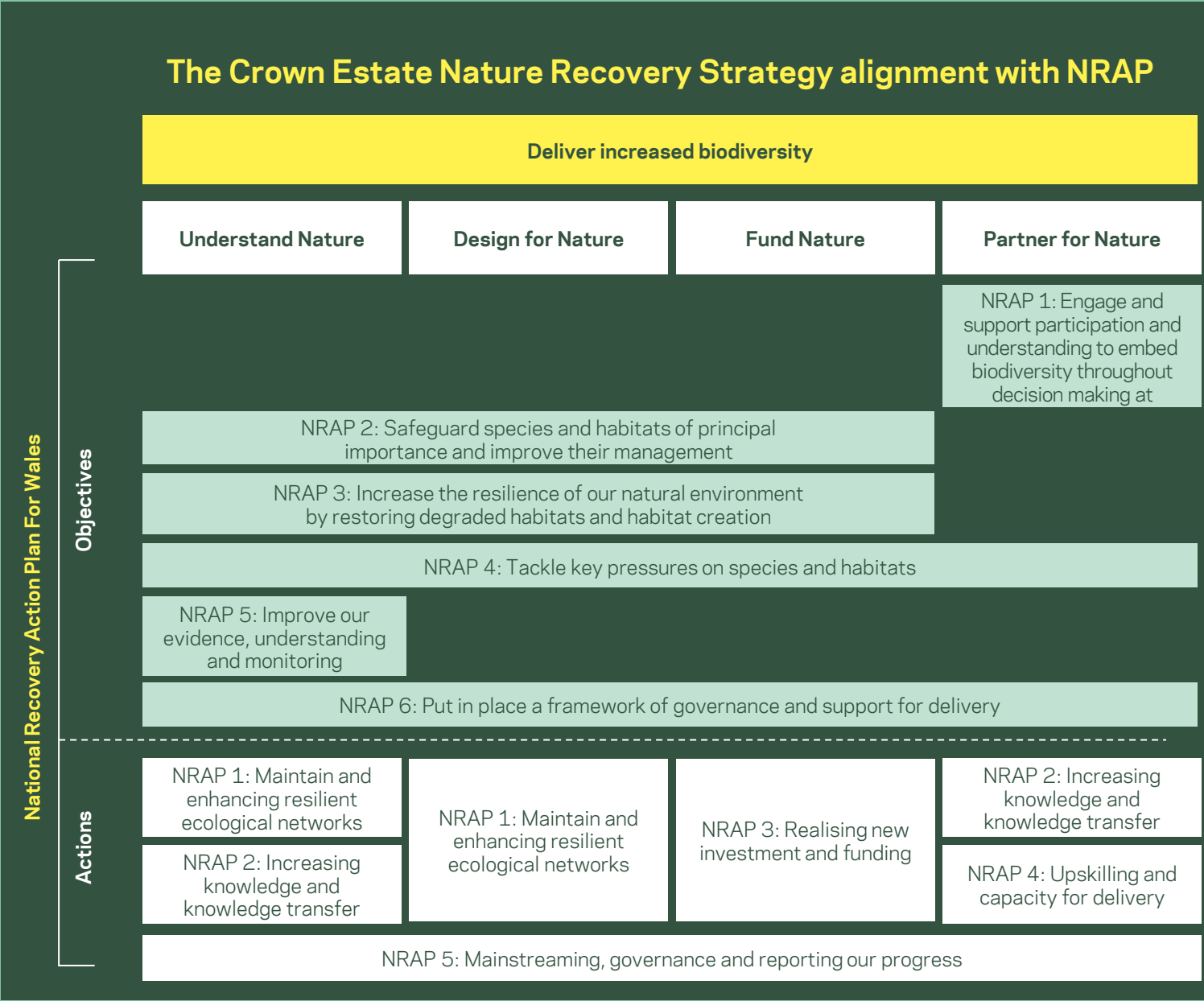


Aligning our Nature Recovery Ambition with NRAP

The Crown Estate Nature Recovery Goals alignment with NRAP objectives

The Nature Recovery Action Plan (NRAP) is the National Biodiversity Strategy and Action Plan for Wales, originally published in 2015 and refreshed in 2021.

The Crown Estate’s nature recovery strategy aligns with NRAP. The diagram to the right illustrates how our goal and commitments on increasing biodiversity align with the NRAP framework in Wales.



Area Statements and our Local Commitment

Part 1 of the Environment (Wales) Act sets out the legislative framework to ensure natural resources and ecosystems are resilient and able to provide benefits (ecosystem services) now, and for the future, through the 'sustainable management of natural resources'.

The Area Statements are a key tool in implementing the Natural Resources Policy; they outline the key challenges facing a particular locality, actions required to meet those challenges, and how natural resources can be better managed for the benefit of future generations. We have mapped our assets against the area statements.

The Crown Estate is committed to supporting the sustainable management of Wales' natural resources and will continue to develop our nature recovery actions and targets to address local priorities (see Action Report in Part 5 of this report).

The map delineates the regions of Wales as specified by Natural Resources Wales (NRW) and provides detailed information regarding The Crown Estate's ownership and interests.

The Crown Estate
Land Ownership &
Interests



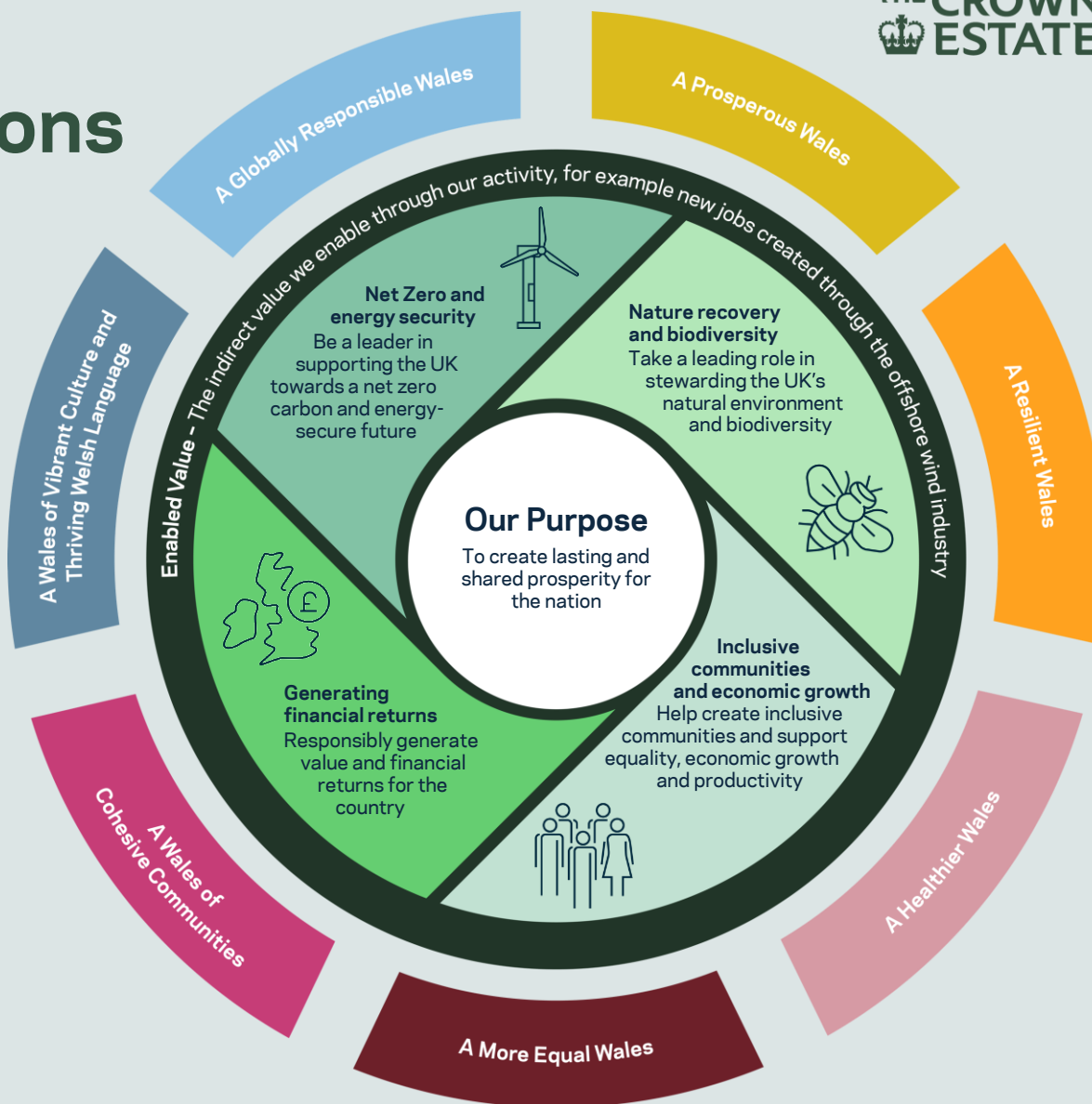
Alignment between our Value Creation Framework and the Well-Being of Future Generations Act

The Well Being of Future Generation Act (WBFG Act) aims to improve the social, economic, environmental, and cultural well-being of Wales. It has established seven well-being goals.

The Crown Estate's Value Creation Framework (VCF) and the four strategic priorities that it underpins align well with key principles in Wales's legislative and policy frameworks, including the WBFG Act.

The Crown Estate approaches investments and decisions with a view to creating long-term environmental, social and economic impact, and uses an internal framework called the Value Creation Framework (VCF), summarised in the diagram, to guide all decisions and business activities.

Through the VCF, our decision-making considers all aspects of value (i.e. net zero, nature recovery, inclusive communities and responsible financial returns). This means that our activities support an integrated approach to natural resource management and biodiversity enhancement. This comprehensive framework enables The Crown Estate to act as a responsible steward while supporting long-term environmental, social, and economic objectives through practical implementation of key legislation and policy drivers.



PART TWO: The Crown Estate biodiversity baseline

We are providing specific details for our biodiversity baseline, including distribution of key biodiversity features in Wales which intersect with The Crown Estate's holdings.



Biodiversity Designations and Habitats and our Portfolio

This page provides information on the distribution of key biodiversity features in Wales that intersect with The Crown Estate's holdings.

On Land

Our ownership includes large areas of common land and small areas of other rural land totalling ~28,000 hectares. On the next page we have provided information on the following national conservation designations, which are underpinned by environmental legislation:

- National Park and National Landscape (formerly Area of Outstanding Natural Beauty AONB);
- Special Area of Conservation (SAC), Special Protection Area (SPA) and Ramsar site (Ramsar);
- National Nature Reserve (NNR), Site of Special Scientific Interest (SSSI) and Local Nature Reserve (LNR).

We have also provided a list of Habitats of Principal Importance (HoPI) occurring on our land. These are national conservation priorities listed under Section 7 of the Environment (Wales) Act 2016.

At Sea

The Crown Estate's portfolio includes ~65% of foreshore in Wales and the territorial seabed out to 12 nautical miles, totalling 1,567,085 hectares. On the next page, we have reported on the same conservation designations as those listed above, with the addition of Marine Conservation Zones (MCZs). We have also reported on HoPI occurring in the marine and coastal environment.

Technical Information

All measurements were undertaken in a geographic information system using publicly available data from Natural Resource Wales provided on [Data Map Wales](#). On land, we have looked at data intersecting our Welsh common land and other rural land. At sea we have looked at data intersecting our total ownership area. To identify Habitats of Principal Importance at sea, we have used available data from Data Map Wales on [Section 7 marine habitats](#).

Currently we are unable to report on the condition of specific habitats or species due to the lack of consistent condition data for our land holdings. Within our Nature Recovery Ambition, we have included specific targets (see page 27-28) to improve our evidence base for nature. Updates will be provided in future reports.

We have not reported on the presence or status of Species of Principal Importance (SoPI) listed under Section 7 of the Environment (Wales) Act 2016. Gaining a better understanding of species will be an action we will take forward in future Section 6 Duty Reports.

We recognise that this baseline is a starting point and does not reflect our potential indirect interfaces with nature in Wales (both positive and negative). Nor does it represent a wider analysis of our nature related dependencies and impacts across our entire chain. We aim to publish information on these elements in the future, with the exact date to be confirmed.

The data provided on the following pages for land and sea is set out by Area Statement area.

Nature Conservation Designations and Habitats of Principal Importance – On Land

	Area of The Crown Estate's Land In Each Area Statement Area (hectares)					
Designation Type**	Mid Wales	North East Wales	North West Wales	South East Wales Area	South West Wales	South Wales Central
Ancient Woodlands	2	3	1	45	21	-
Areas of Outstanding Natural Beauty	-	42	53	146	-	-
Habitats of Principal Importance (HoPI)*	11,488	14	12,171	2	3,443	-
Local Nature Reserves	-	-	3	-	9	-
National Parks	-	-	7,547	-	72	-
National Nature Reserves	8	-	9	4	6	-
Ramsar sites	2	6	5	66	49	-
Special Areas of Conservation	2,597	6	3,914	102	2,247	-
Special Protection Areas	3,212	6	3,381	66	2,171	-
Sites of Special Scientific Interest	5,878	55	5,918	43	2,248	2

* Terrestrial HoPI habitats identified using publicly available data from Data Map Wales.

* Open Mosaic Habitat on Previously Developed HoPI type was identified, however, the area of this habitat summed to less than 0.05ha and is not shown in the table owing to the rounding of figures to the nearest whole number.

* HoPI identified include: blanket bog, lowland dry acid grassland, lowland fens and reedbeds, lowland heathland, lowland meadows, purple moor-grass and rush pastures, raised bog, upland flushes, fens and swamps, upland heathland, wood pasture, lowland calcareous grassland, traditional orchard, upland calcareous grassland, and marsh fritillary habitat.

Nature Conservation Designations and Habitats of Principal Importance - At Sea

	Area of The Crown Estate's Land In The Marine Area Statement Area* (hectares)	
Designation Type	Intertidal	Marine
Marine Conservation Zones	-	1,281
Areas of Outstanding Natural Beauty	4,087	-
Habitats of Principal Importance (HoPI)**	10,686	386,788
Local Nature Reserves	1,222	-
National Parks	3,595	-
National Nature Reserves	3,238	-
Ramsar sites	4,467	5,540
Special Areas of Conservation	14,723	479,898
Special Protection Areas	7,984	442,456
Sites of Special Scientific Interest	16,494	19,766

*The Natural Resource Wales Marine Area Statement area has been divided into Intertidal and Marine following the GIS data provided on Data Map Wales.

† HoPI identified include: tide sweep channel, carbonate reef, estuarine rocky habitats, intertidal underboulder communities, mixed muddy sediments, mud deep water, mud gravel, blue mussel, intertidal mudflats, mearl beds live, modiolus beds, seagrass, peat clay, *Sabellaria alveolata* (honeycomb worm) reefs, saline lagoon and saltmarsh.

‡ Marine and intertidal HoPI habitats identified using Natural Resource Wales Section 7 and OSPAR habitat data available on Data Map Wales.



PART THREE: Case Studies

This section presents key case studies that showcase biodiversity actions The Crown Estate has delivered in this reporting period in Wales. Each case study is mapped to the NRAP themes relevant to it, which are aligned to The Crown Estate's Nature Recovery Ambition.



Case Studies Overview

The following Projects have been identified to showcase The Crown Estate's commitment to Nature Recovery in Wales:

- 1:** Crawcwellt Moor pilot project baselining and enhancing habitats
- 2:** Llyn Trawsfynydd pilot project on commons management with communities
- 3:** Building marine resilience through strategic action: Marine Delivery Routemap
- 4:** Building marine resilience through strategic action: Environmental Value Creation Round 5
- 5:** Enabling seagrass restoration projects
- 6:** Research on ocean fronts
- 7:** Marine internships for new talent
- 8:** Offshore Wind Energy and Change Programme
- 9:** High-Integrity Marine Natural Capital Markets

The following icons identify how The Crown Estate projects deliver against NRAPs five key themes::



NRAP 1: Maintaining
and Enhancing
Resilient Ecological
Networks



NRAP 2: Increasing
Knowledge and
Knowledge Transfer.



NRAP 3: Realising New
Investment and Funding.



NRAP 4: Upskilling and
Capacity for Delivery



NRAP 5:
Mainstreaming,
Governance and
Reporting our Progress

Case Study 1: Crawcwellt Moor pilot project baselining and enhancing habitats

Our 2023 habitat baseline of Crawcwellt Moor targeted an area of Habitat of Principal Importance (HoPI) located in Rhinogydd, Gwynedd. The purpose of the survey was to produce a biodiversity baseline to strengthen our evidence base with a view to bringing forward future proposals to enhance and restore certain habitats.

Crawcwellt Moor is dominated by Sphagnum mire, heathland and purple moor-grass. Our baseline identified several issues affecting the biodiversity value of this land including:

- Establishment of non-native conifers on open moorland;
- Areas of degrading peat caused by drainage ditches;
- Areas of over grazing; and
- Over-dominance of purple moor-grass which could increase fire risk.

FWAG Cymru (Farming and Wildlife Advisory Group) have produced a list of recommendations to improve habitat quality to enhance the land for notable plant and animal species. These include removal of conifer saplings, re-wetting areas of peat, and managing purple moor-grass through cutting and grazing. We aim to engage graziers with commons rights on a future management plan for the moor which will balance agricultural and wildlife interests. The learnings from this project will also be applied to our future approach to developing shared nature recovery visions and action plans in other areas.



Case Study 2: Llyn Trawsfynydd pilot project on commons management with communities

Starting in 2022, The Crown Estate undertook a pilot stakeholder engagement exercise, in partnership with the FWAG Cymru, to understand threats and opportunities for biodiversity on land near Trawsfynydd, Cyngor Gwynedd. Four active grazing associations were engaged through face-to-face meetings and telephone interviews. The exercise has provided valuable insight into a range of land management issues affecting local communities and the natural habitats making-up the common land we own. They include:



- Finding the right balance for grazing to benefit livestock farming and habitat conservation;
- Bracken management;
- Maintenance and management of public access routes;
- Ditch and watercourse management;
- Native woodland creation and woodland management;
- Decline in individual species, e.g. ground-nesting birds;
- Management of predators; and
- Impact of agri-environment schemes on grazing practices.

We will use the approach developed as part of this pilot to roll out to other areas of common land in our ownership.



Case Study 3: Building marine resilience through strategic action: Marine Delivery Routemap

In collaboration with partners and stakeholders, The Crown Estate is developing a Marine Delivery Routemap to provide a long-term vision to unlock competing demands on the seabed and enable nature recovery and help deliver our net zero transition and economic growth to 2050. It will provide holistic information to help protect nature and improve ecosystem resilience in the coastal and marine environment.

The Crown Estate will integrate nature as a priority into the Marine Delivery Routemap, developing a strategic nature opportunity map to identify and build consensus on areas that offer the best opportunities for nature recovery across our marine and coastal portfolio. This will support accelerated delivery of improvements across marine and coastal habitats by 2030 in close collaboration with others.

For more information on Marine Delivery Routemap, please visit:
<https://www.thecrownestate.co.uk/our-business/marine/Marine-Delivery-Routemap>



Storm Petrel seabird - Credits: Mark Bolton



Case Study 4: Building marine resilience through strategic action: Environmental Value Creation & Offshore Wind Leasing Round 5

The Crown Estate has launched the Floating Offshore Wind Leasing Round (Round 5), in the Celtic Sea, off the coast of West Wales which presents a huge opportunity to unlock important new renewable energy, but also catalyse innovation, green jobs and opportunities to inspire the next generation. Round 5 is set to be a game-changer for the UK's offshore wind industry and will be transformative for the communities associated with these projects.

The Crown Estate has taken several steps to create a solid foundation for a successful leasing round and to build in early considerations for nature, these include:

- Carrying out an upfront plan-level Habitat Regulations Assessment (subject to a Conformity Check) that helps to increase Bidders certainty on the potential environmental interaction the Project Development Areas may have with the UK's national site network of designated areas.
- Conducting a major programme of technical and environmental pre-consent surveys, providing valuable data to bidders and ensuring developments are planned with nature in mind from the outset.
- Incorporating specific social and environmental value objectives within Round 5.

In terms of environmental value creation, successful bidders must deliver positive environmental value and submit a Positive Environmental Outcome Plan within six months of entering a Wind Farm Agreement for Lease.

The Crown Estate has collaborated with Statutory Nature Conservation Bodies to develop example interventions for positive environmental value commitments. By separating these from compliance requirements, The Crown Estate is fostering learning and acknowledges potential uncertainties. This approach offers exploration and discovery opportunities, encouraging developers to set appropriate ambition levels and investments for the early commercial deployment of floating offshore wind technology, aiming for lasting positive outcomes in the Celtic Sea.

More information on Round 5, and all supporting documentation, is available on our website:

[Offshore Wind Leasing Round 5 | The Crown Estate](#)



Case Study 5: Enabling seagrass restoration projects

Since developing the Small Habitat Activity License (SHAL) in the 2022, the project has supported seagrass restoration by allowing non-commercial activities for up to five years.

For non-commercial restoration projects we aim to keep licensing costs to a minimum, helping to address a known barrier to habitat restoration in the coastal and marine environment. Whilst trialling the SHAL we have waived administration fees and absorbed the legal costs associated with processing the license.

The Crown Estate will be working to refine the licensing product and build the SHAL into our standard processes. We are committed to supporting restoration projects and will be working to host information about projects on our [Marine Data Exchange](#) as a public resource.

Already, the project has produced several promising outcomes including:

- Lower financial barriers for those seeking to innovate in the habitat restoration space;
- Enhance collaboration with new project partners;
- Direct contributions to rebuilding the resilience of seagrass and freshwater oyster habitats; and
- Promoting the long-term sustainability of marine assets owned by The Crown Estate



Case Study 6: Frontward: Fronts for Marine Wildlife Assessment for Renewable Developments

Through 2024 and 2025, The Crown Estate is working with Bangor University and several other project partners, funding research to increase our understanding of ocean fronts as a proxy for biodiversity and how this can be applied in marine spatial planning.

The project aims to:

- Enhance oceanfront data and understanding;
- Inform marine biodiversity and development decisions;
- Support nature recovery;
- Innovate marine operational methods;
- Boost spatial modelling impact assessment;
- Mitigate risks in marine consenting; and
- Foster collaboration with Statutory Nature Conservation Bodies (SNCBs) regulators, academics and marine stakeholders.

Our Frontward project comprises an important contribution to understanding the state and distribution of marine biodiversity in Wales.



Frontward team picture



Case Study 7: Marine internships for new talent

The first North Wales Marine Internship was launched in 2024 in partnership with North Wales Wildlife Trust, Menter Môn, and M-SPARC. Each organisation provided opportunities for two interns to develop skills in marine conservation, renewable energy, marine policy, and community engagement.

Working with North Wales Wildlife Trust, The Crown Estate supported the interns to:

- Undertake seagrass restoration mapping across Llyn and Ynys Môn;
- Run community events in Llandudno, Porth Meudwy and Rhoscolyn aimed at ocean rescue objectives; and
- Support the Marine Characterisation Project with Menter Môn by helping to develop Environmental Monitoring and Mitigation Plans through data processing and standardisation to protect marine wildlife.

By participating in the programme, interns received a comprehensive overview of potential career opportunities in the marine sector. It provided a valuable opportunity for cross-sector collaboration and knowledge transfer focusing on marine nature themes.



Shore search during Marine internship in North Wales



Case Study 8: Offshore Wind Evidence and Change Programme

The Crown Estate has invested £50 million in the Offshore Wind Evidence and Change Programme (OWEC) to fund projects that de-risk and accelerate clean offshore technologies, supporting the UK's position as a leading offshore renewables investment destination while enabling marine ecosystems to thrive.

OWEC is led by The Crown Estate and unites 26 government organisations, industry bodies, and environmental NGOs to address climate and biodiversity crises. Projects target knowledge gaps to create a comprehensive picture of seabed interdependencies, enabling better-informed decisions by Government, regulators and industry.

The programme has already played a role in influencing policy decisions, providing valuable insights that contribute to more informed and effective regulations. Findings from projects are hosted on our Marine Data Exchange, a world leading, first of its kind resource of marine industry survey data, research, and evidence.

Highly Pathogenic Avian Influenza (HPAI) Surveys: Natural Resources Wales has coordinated an extensive coastal monitoring programme that combined surveillance activities with offshore wind development assessments. They have established comprehensive monitoring across key seabird colonies, notably at Skomer and Ramsey Islands, enabling detailed analysis of avian influenza impacts and potential interactions with proposed Celtic Sea wind developments.

Planning Offshore Wind Strategic Environmental Impact Decisions (POSEIDON) Natural Resources Wales and Bangor University are creating environmental sensitivity maps for Cardigan Bay's Welsh waters, incorporating marine mammal data from the local bottlenose dolphin population. The work provides essential baseline data for both conservation and sustainable offshore wind development planning.



Case Study 9: Development of the High-Integrity Marine Natural Capital Markets Roadmap

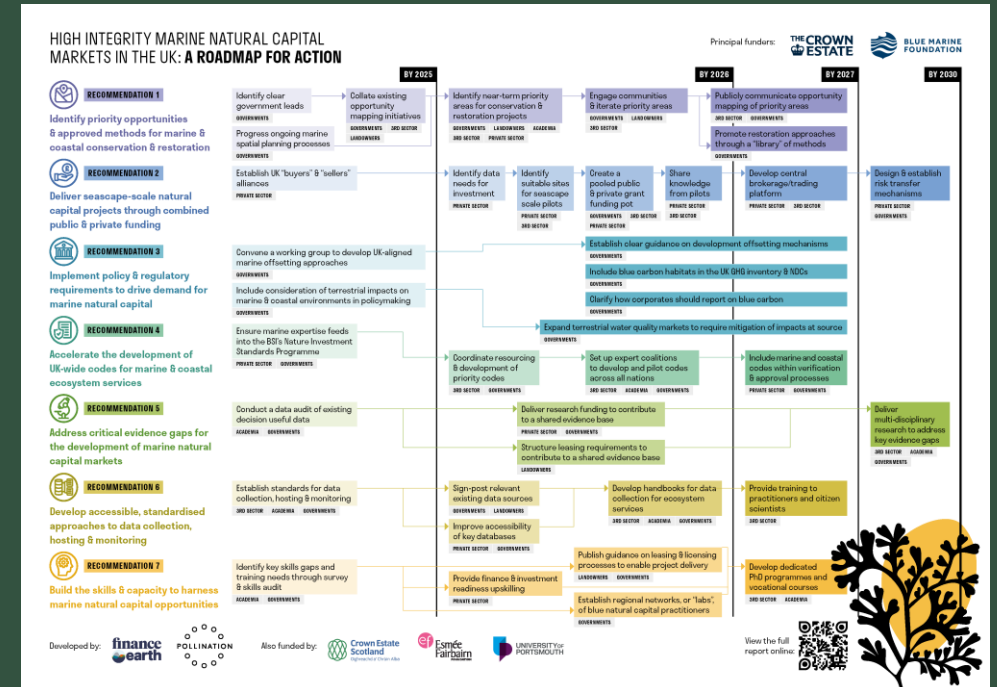
In May 2024, The Crown Estate published a first-of-its-kind Roadmap to unlock vital investment in the protection and restoration of marine and coastal ecosystems, building on existing actions across the UK.

Published with our partners - Blue Marine Foundation, Crown Estate Scotland, Esmée Fairbairn Foundation, Finance Earth and Pollination - the Roadmap was co-designed through a year-long process involving over 200 UK and international experts across academia, industry, finance, government and not-for-profits. It presents a pathway to delivering high-integrity marine natural capital markets which can provide much needed new sources of finance to protect, restore and sustainably manage marine and coastal ecosystems.

The Steering Group for the project included representation from Welsh Government, and Welsh stakeholders who contributed to the Roadmap's development through an online consultation and in-person workshop, co-hosted by the Welsh Government in Cardiff (November 2023).

The seven recommendations contained in the report, which are not set out in any order of priority, call on a wide cross-section of stakeholders to address barriers in areas such as funding, target sites for restoration, long-term monitoring, data and evidence, and skills and knowledge to deliver marine natural capital projects at scale. Each recommendation is accompanied by actions for implementation to 2030, as well as key stakeholders to lead on each action to overcome barriers to their implementation and deliver real, measurable value for people and nature.

The report - [High-Integrity Marine Natural Capital Markets in the UK - A Roadmap for Action](#) - is available here to download.



PART FOUR: Highlights, key outcomes and issues

We set out our key highlights, which include communication and engagement, funding and partnerships, data and evidence, integrating biodiversity into decision-making, and our value creation framework. We also outline our plans for improvements and advancing key opportunities.

Highlights and Outcomes

Understand Nature: Data and evidence

The Crown Estate is enhancing data capture to prioritise activities and ensure effective biodiversity and ecosystem resilience actions in Wales. This includes making data available through our [Marine Data Exchange](#) and building a holistic evidence base for the Marine Delivery Routemap.

Design for Nature: Embed biodiversity throughout decision-making

The Crown Estate's Nature Recovery Ambition sets goals to conserve nature, increase biodiversity, address water degradation, and reconnect people with nature. This aligns with NRAP objectives and the WFG Act in Wales. A dedicated programme team, overseen by a Sustainability Taskforce, drives key actions with nature leads in each business area. The Leadership Team and Value Creation Committee ensure goals are embedded and investment decisions align with the Value Creation Framework. Regular updates including on stakeholder engagement are conducted with the Board's Sustainability Committee.

Design for Nature: Value Creation Framework

Our approach to nature recovery must be integral to the transition to a net zero energy secure future alongside building social and economic resilience. We approach investments and decisions with a view to creating long-term environmental, social and economic impact by assessing them using our Value Creation Framework and this has been enhanced to ensure that nature is a core consideration for how we create value.

Fund for Nature: Supporting research and accelerating investment for nature

The Crown Estate collaborates with partners and funds research to drive sustainable development and environmental stewardship in Wales. Increased investment in marine research supports renewable energy targets, local communities, economic development, and marine resilience. We have been focused on how we can accelerate funding and private sector investment in nature and environmental enhancement, including pressure reduction, active restoration, and habitat creation, aligned with our Nature Recovery Ambition.

Partner for Nature: Working together for nature recovery

The Crown Estate has co-developed our Nature Recovery Ambition with nature stakeholders across Wales and with a focus on supporting key policy frameworks and action plans like NRAP. This engagement has helped shape our ambition and approach and the decisions we make across our portfolio to help improve the social, economic, environmental and cultural well-being of Wales. We work together on various projects, fostering partnerships and open communication with graziers with common rights, policymakers, conservation organisations, farming unions academics, and public authorities.



Improvement and Opportunities

A key part of ensuring we achieve our Nature Recovery Ambition and meeting our Section 6 Duty is acknowledging the challenges we face and how we are proposing to overcome these in the future. Since our previous Section 6 Duty Report, The Crown Estate has reflected on these challenges and has identified the following opportunities for improvement against the four commitments within our Nature Recovery Ambition.



Understand Nature

We will further develop our nature actions, drawing on priorities identified within Natural Resource Wales's Area Statements.

We will continue to improve our spatial evidence base across land and sea. For example, we wish to increase our understanding of the condition of different habitats and species in our portfolio.



Fund Nature

At sea, there is a significant opportunity for us to facilitate and convene different players in the nature finance space to bring forward opportunities to restore nature. On land, we will further investigate opportunities to direct funding to nature recovery.



Design for Nature

We are in the early stages of deploying our Nature Recovery Ambition. We will use the nature targets to drive action on nature recovery over the next Section 6 reporting period and our key performance indicators to measure success. A core focus will be embedding nature principles into our core leasing and working with developers on nature inclusive design.



Partner for Nature

We will continue to build collaborative partnerships and deepen relationships to catalyse action for nature recovery. For example, there are opportunities to roll-out further engagement with stakeholders involved with The Crown Estate's common land in Wales. The Crown Estate will continue to work hard to improve our impact on biodiversity and improve ecological resilience. We aim to continually develop our efforts towards promoting ecosystem resilience across Wales and promote the ways of working set out in The Well-Being of Future Generations Act.

PART FIVE: Actions across our portfolio

This section reviews existing actions we are taking to drive forward nature recovery across our land and operations in Wales. It also describes future targets and actions which we will report on in the next Section 6 Duty reporting period.

The Crown Estate's Nature Recovery Ambition – Headline Targets for increasing biodiversity

Realm	Headline Targets	KPIs
At Sea	S1. Integrate nature as a priority into the Marine Delivery Routemap, drawing on our Whole of Seabed evidence base to: <ul style="list-style-type: none"> a) Identify the most suitable locations for nature recovery interventions in partnership with stakeholders by 2028. b) Double the area leased to marine and coastal nature recovery focussed activities by 2030, measured against a 2025 baseline. 	<p>Publish a nature recovery opportunity map.</p> <p>Area licensed / leased for nature recovery focussed activities ha/annum and cumulative total area allocated to recovery.</p>
	S2. Increase understanding of the state of protected and vulnerable habitats, both inside and outside of Marine Protected Areas (MPAs), within our jurisdiction, working with others to support improvement by 2030.	<p>Number of Nature Action Plans for Marine Protected Areas (MPAs) in each phase of production (development, draft, published).</p> <p>Number of Nature Action Plans outside of MPAs in each phase of production (development, draft, published).</p>
	S3. Accelerate private sector investment in nature and support the development of innovative, high-integrity finance mechanisms.	<p>Funding allocated by The Crown Estate for nature-related projects and activities.</p> <p>Co-funding brought in by The Crown Estate's nature-related projects and activities (public, philanthropic, private sources).</p> <p>With partners, report on progression against the High Integrity Marine Natural Capital Markets Roadmap.</p>
On Land	L1. Work with graziers with common rights, local communities, statutory agencies and other stakeholders to agree a shared nature recovery vision for selected commons in Wales and Cumbria, by identifying key nature recovery opportunities on common land within our ownership and begin implementing action plans by 2030.	Area of land in nature recovery commons partnership management in Wales and Cumbria.

The Crown Estate's Nature Recovery Ambition – Supporting Targets for increasing biodiversity

Realm	Supporting Targets	KPIs
At Sea	S4. Develop and publish our 'best available nature baseline' annually from 2026, with evidence on habitats and mobile species from our Whole of Seabed approach.	Number of initiatives supported, and species targeted. Publish a summary of initiatives underway to address key evidence.
	S5. Develop and apply nature principles for all new tenders and leases to incentivise delivery of outcomes for nature across all sectors in the marine & coastal environment.	Number of new tender activities and lease agreements with nature principles applied.
	S6. Continue to support effective initiatives that provide benefit for impacted, threatened or notable species in the marine and coastal environment.	Number of initiatives supported, and species targeted. Relative contribution of supported initiatives to improved connectivity and ecosystem functionality.
On Land	L2. Increase positive management of Rural Sites of Special Scientific Interest (SSSI) and Habitats of Principal Importance, in England and Wales. Produce Nature Action Plans by 2028 to improve their condition and implement actions by 2030.	Number and percentage of portfolio SSSI units that are in different condition categories. Area and percentage of Habitats of Principal Importance/ancient woodland (outside of SSSI) and condition status (including if status unknown). Number of Nature Action Plans in each stage (development, draft, published, implemented) per annum.

NRAP Objective 1: Engage and support participation and understanding to embed biodiversity throughout decision-making at all levels

Current Actions

Our Nature Recovery Ambition and stakeholders

- Interviews were conducted with Welsh stakeholders as part of developing our Nature Recovery Ambition, to inform the setting of our goals, commitments and targets. As a result, our Nature Recovery Ambition was published in October 2024.

Embedding Nature in the business

- We have developed a Nature Recovery Ambition and Value Creation Framework which aims to embed biodiversity throughout our decision-making at all levels.

On Land

- Our pilot projects on the commons were developed with partners and have shaped an approach to working effectively with graziers with common rights.

At Sea

- Our Marine Delivery Routemap is being developed to provide a long-term vision to unlock competing demands on the seabed out to 2050. For further information see page 19.

Our people

- Funded a Marine Futures Internship program in North Wales, which is managed by the North Wales Wildlife Trust and run in partnership with M-SPARC and Menter Môn, providing opportunities for young people to develop on-the-job skills in a range of specialist areas and experience different career paths within the marine sector.
- To enable internal knowledge exchange, we organised nature-focused townhall meetings, nature walks, and hosted lunch and learns with RSPB, WWF, and National Trust, where employees watched a series of Wild Isles-related films and discussed nature conservation issues.

Future Actions

Our Nature Recovery Ambition

- We will work towards integrating our Nature Recovery Ambition into operational decision-making processes. Our current targets focus on defining our baseline and identifying the greatest opportunities for impact. We intend to streamline to fewer, quantified targets. Collaboration and data are key as we work with customers and stakeholders, evolving shared targets through an iterative approach.
- Use our Value Creation Framework to enhance well-being and livelihoods and nature.

On Land

- We will leverage the methodologies and insights from our case studies on stakeholder engagement and specific nature recovery projects, The Crown Estate will extend this approach to other areas of common land in Wales. This initiative aims to understand the key pressures faced by graziers with common rights and use the findings to inform our internal decision-making on biodiversity.
- Committed to shaping a collective vision and action plan for nature recovery opportunities that improve the resilience of the land and the livelihoods of graziers with common rights.
- Develop a nature recovery action plan in relation to our minerals interests and consult relevant stakeholders.

At Sea

- Continue to support and fund the marine internship programme in Wales.
- Integrate nature as a priority into the Marine Delivery Routemap, developing a strategic nature opportunity map to identify and build consensus on areas that offer the best opportunities for nature recovery across our Welsh marine and coastal portfolio. This will support accelerated delivery of improvements across marine and coastal habitats by 2030 in close collaboration with others.
- With partners, report on progression against the High Integrity Marine Natural Capital Markets Roadmap.

NRAP Objective 2: Safeguard Species and Habitats of Principal Importance and improve their management

Current Actions

On Land

- Partnered with John Muir Trust and FWAG Cymru to complete a pilot baseline survey of Crawcwellt common land (see page 17). The Crown Estate was able to identify habitats and species of principal importance and recommend future management activities and priority actions to safeguard both habitats and species across this area of commons.

At Sea

- The Marine Characterisation Research Project (MCRP), funded by the European Regional Development Fund and The Crown Estate, is developing an Environmental Monitoring and Mitigation Plan (EMMP) for commercial-scale deployments of tidal stream energy turbines. The EMMP aims to safeguard species and habitats of principal importance and improve their management by limiting and monitoring potential impacts on marine life, especially marine mammals and seabirds, during the operation of the Morlais project. This research will guide the phased deployment of turbines, ensuring sustainable development.
- The Crown Estate and the UKRI Natural Environment Research Council (NERC) are co-funding the ECOFlow research programme, which aims to understand the ecological effects of floating offshore wind on marine ecosystems. The programme will help support the sustainable development of floating offshore wind in both the Celtic Sea and North Sea. This is just one example of how The Crown Estate is investing in the evidence base needed to inform decision-making, and the sustainable management of marine resources.

Future Actions

On Land

- Identify options for funding, delivering and supporting peatland restoration across our holdings in Wales, to support Wales's National Peatland Action Programme.
- We will increase positive management of our SSSIs and Habitats of Priority Importance, in Wales. We will produce Nature Action Plans by 2028 and improve their condition and implement actions by 2030.
- We will work with NRW to achieve up to date assessments of condition for Habitats of Priority Importances.
- We will aim to better our understanding of Species of Principal Importance across our holdings. We will develop a method for identifying areas of common land that are most important for species of conservation concern. We will share our method with NRW and other partners for comment. We will investigate what resources are required to establish an appropriate species baseline for our land.

At Sea

- We will continue to support restoration projects across the marine holdings (since 2020, The Crown Estate have provided licences for six restoration trials in Wales, including: the Wild Oyster Project: Conwy Bay, Seagrass Ocean Rescue: North Wales, Seagrass Ocean Rescue: Dale and The Wales Native Oyster Restoration Project).
- The Crown Estate will support Menter Môn to develop monitoring technologies that will collect environmental data in the Morlais SAC. We aim to improve our understanding of habitat condition and produce an action plan by 2028 to safeguard Species and Habitats of Principal Importance within the area.
- Publish several Nature Action Plans for Marine Protected Areas (MPAs) in each phase of production (development, draft, published).

NRAP Objective 3: Increase the resilience of our natural environment by restoring degraded habitats and habitat creation

Current Actions

On Land

- In partnership with FWAG Cymru, The Crown Estate has conducted stakeholder engagement to understand areas of habitat degradation across their commons.

At Sea

- The Crown Estate has funded research that provides a more detailed spatial understanding of the opportunities to create saltmarsh habitat through managed realignment in Wales. Our findings have been shared with Natural Resources Wales, contributing to their understanding of enhancement opportunities.
- We are active participants in the Wales Coasts and Seas Partnership (CaSP Cymru) and the Seagrass Network Cymru. Through CaSP Cymru we are working with the Sustainable Investment Working Group to support the development of a voluntary fund (MARINE Fund Cymru) dedicated to enhancing the health of Welsh seas. We are also working with the Marine Biodiversity Expert Group to increase our understanding of enhancement opportunities for coastal and marine habitats.
- Enabling restoration trials by developing new licence products and actively supporting the delivery of non-commercial projects. With this, The Crown Estate has supported the restoration of seagrass and native oyster habitats in Wales. For further information see page 21.

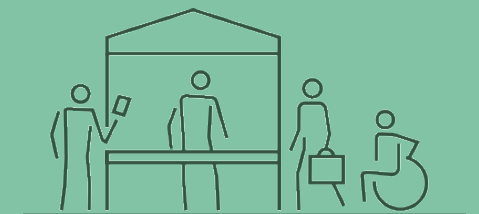
Future Actions

On Land

- Draw together an action plan based on the recommendations from previous pilots to restore degraded and create habitats.

At Sea

- Prioritise areas for nature recovery and increase the pipeline of new nature projects on our foreshore and seabed.
- The Crown Estate will support conservation work and skills development by funding the Marine Futures North Wales Internship Programme.
- Developing a scope of work with Natural Resources Wales and Welsh Government to improve spatial mapping of enhancement opportunities along the Welsh coastline.
- Continue our partnership working with the Wales Coasts and Seas Partnership (CaSP Cymru) and other stakeholder groups.
- Support a number of initiatives aligned to addressing evidence gaps linked to species resilience, ecosystem functionality and connectivity. These will be linked to priorities identified by Natural Resources Wales and Welsh Government.



NRAP Objective 4: Tackle key pressures on species and habitats

Current Actions

On Land

- The Crown Estate have conducted a pilot on Crawcwellt moor to gather baseline data on important habitats and to identify pressures impacting the site. For further information see page 17.
- The Crown Estate are working with NRW and the Mine Remediation Authority (formerly the Coal Authority) to facilitate surface water management for lead and zinc contamination into the Afon Teifi in Northern Ceredigion.

At Sea

- The Crown Estate is co-funding and working in partnership with statutory and non-statutory partners to deliver novel research that improves our understanding on the impacts of different sectors on the marine environment. For example, The Crown Estate is supporting:
 - ECOFlow and ECOWind, including the ECOWind-Accelerate project led by Bangor University;
 - The Marine Characterisation Research Project;
 - Several PhD projects through different Centres for Doctoral Training, including a PhD project at Bangor University looking at the impact of offshore wind on benthic ecosystem functioning.

Future Actions

Our Nature Recovery Ambition

- We are focused on reducing pressures on habitats and understanding the positive impact that has on species across our portfolio. We will use this knowledge and evidence to develop our Nature Action Plans and other interventions.

On Land

- We intend to roll-out the survey and assessment approach undertaken at Crawcwellt Moor to other appropriate areas of common land. This information will be used to bolster our evidence base on what habitats are present, their condition and key pressures affecting them.

At Sea

- Prioritise areas for nature recovery and increase the pipeline of new nature projects to further our investment in meaningful research, working in partnership with statutory and non-statutory bodies to address key knowledge gaps and improve the sustainable management of marine resources.
- Working with stakeholders to identify the best available evidence and spatially represent the most important areas for coastal and marine biodiversity, including both habitats and mobile species. This evidence base will underpin the Marine Delivery Routemap (see page 19) and builds on our previous engagement, including a Whole of Seabed Programme workshop held in Cardiff (October 2024).



NRAP Objective 5: Improve our evidence, understanding and monitoring

Current Actions

On Land

- Conducted physical inspections of Welsh Commons, which take place every five years.

At Sea

- Supported partners by investing in innovative research programmes, this includes:
 - A £50 million investment in the Offshore Wind Evidence and Change Programme, funding a range of projects to support the sustainable expansion of offshore wind. This includes investment in ECOWind and ECOFlow (see page 34 - objective 4).
 - Funding the Frontward project, which will increase our understanding of ocean fronts as a proxy for biodiversity and is being delivered in partnership with Plymouth Marine Laboratory, the University of Bangor and the University of Aberdeen (see page 22).
 - Funding PhD projects through the Centre for Doctoral Training in Sustainable Management of UK Marine Resources (CDT SuMMeR), including a PhD project led by the University of Bangor looking at habitat mapping and ecosystem function linked to benthic communities. For further information see [project link](#) or watch [Youtube video](#).
 - Co-funded The Marine Characterisation Research Project (MCRP), which is developing an Environmental Monitoring and Mitigation Plan (EMMP) for commercial-scale deployments of tidal stream energy turbines.
- Establishing and funding a North Wales Marine Internship programme in partnership with North Wales Wildlife Trust, Menter Môn, and M-SPARC. This provides opportunities for interns to explore different marine-related careers and develop skills in marine conservation, renewable energy, marine policy, and community engagement (see page 23).

Future Actions

Our Nature Recovery Ambition

- We are committed to building a 'best available baseline' by 2026 across land and sea.

On Land

- We will roll-out the survey and assessment approach undertaken at Crawcwellt Moor pilot study to other appropriate areas of common land. This information will be used to bolster our evidence base on what habitats are present, their condition and key pressures affecting them.
- The Crown Estate aims to better our understanding of Species of Principal Importance across our rural holdings. We will develop a method for identifying areas of common land that are most important for species of conservation concern. We will share our method with NRW and other partners for comment. We will investigate what resources are required to establish an appropriate species baseline for our land.

At Sea

- Develop and publish our 'best available nature baseline' annually from 2026, with evidence on habitats and mobile species from our Whole of Seabed approach.
- Publish data from ongoing research projects and data collected by our industry customers in Wales to the Marine Data Exchange, ensure data is accessible to all.
- Continue to support and invest in research, internships and partners to address key knowledge gaps and improve our understanding of opportunities to build resilience across marine and coastal ecosystems in Wales.

NRAP Objective 6: Put in place a framework of governance and support for delivery

Current Actions

The Crown Estate has developed a dedicated governance framework for nature recovery. This is operational in Wales and across our entire business. It comprises several key elements:

Our Nature Recovery Ambition

- The Crown Estate published our Nature Recovery Ambition in October 2024 after a year-long engagement with external stakeholders across England, Wales and Northern Ireland. It outlines our commitments, and three interconnected goals focused on increasing biodiversity, addressing the water crisis and enabling people to reconnect with nature. Aligned with this report we have published a full update on our targets and KPIs for our Goal 1 in January 2025.

Our Value Creation Framework and other initiatives

- We have enhanced our Value Creation Framework to ensure that nature is a key consideration to how we create value as a business in Wales, England and Northern Ireland.
- In addition, we have developed structural approaches to embedding nature recovery into our operations at sea. For example:
- Within the floating offshore wind leasing round (Round 5) in the Celtic Sea we included specific considerations for environmental value creation. Successful bidders must deliver positive environmental value and submit a Positive Environmental Outcome Plan within six months of entering a Wind Farm Agreement for Lease. The Crown Estate has collaborated with Statutory Nature Conservation Bodies to develop example interventions for positive environmental value commitments. By separating these from compliance requirements, The Crown Estate is fostering learning and acknowledges potential uncertainties. This approach offers exploration and discovery opportunities, encouraging developers to set appropriate ambition levels and investments for the early commercial deployment of floating offshore wind technology, aiming for lasting positive outcomes in the Celtic Sea.
- Development of the Marine Delivery Routemap (see page 19 for further detail) and engagement with Welsh stakeholders to help develop the evidence base that underpins the Routemap.

Future Actions

Our Nature Recovery Ambition

- Continue to develop our targets within our Nature Recovery Ambition in line with NRAP objectives and taking account of the wider framework of The Well-Being or Future Generations Act.
- Develop appropriate actions in relation to Area Statement priorities.
- Continue to embed nature into our decision-making and investment decisions using the Value Creation Framework and our internal governance for our goals, targets and KPIs including the Sustainability Committee, Sustainability Taskforce and our Value Creation Committee.

On Land

- Ensure that we proactively increase our capacity internally and externally in ecological expertise.
- Continue to and proactively seek to work with local nature partnerships and utilise local Area Statement action plans when implementing nature recovery across our common lands.

At Sea

- Through the continued improvement of the Whole of Seabed evidence base, establish a regular cycle of data collection and spatial modelling. Ensure this approach is informed by continued stakeholder engagement with a wide range of organisations.
- Develop and apply nature principles for all new tenders and leases to incentivise the delivery of outcomes for nature across all sectors in the marine & coastal environment.
- Integrate this holistic evidence base into the Marine Delivery Routemap such that nature is embedded as a priority that informs future decision making across our coastal and marine holdings.



Diolch

