



SIR BENFRO GAN POBL TIR MÔR

PEMBROKESHIRE BY POBL TIR MÔR

2025 EDITION

SUPPORTED BY WWF CYMRU



AM Y DDOGFEN HÔN ABOUT THIS DOCUMENT



Pobl Tir Môr completed a stakeholder research project for WWF Cymru in 2022.

The project allowed us to reflect on our experiences of living and working in Pembrokeshire and collate our knowledge of this stunning and diverse county.

This document is a summary of one element of our 2022 work for WWF. It was updated in 2025 and is based on a variety of different sources. We want to share a flavour and feel for the county we call home, rather than creating a definitive resource. We welcome thoughts, comments and reflections, particularly if you think something important is missing.

A summary of the approach to stakeholder analysis that we developed for our WWF project is also available.

We are grateful to WWF Cymru for commissioning us to work for them in 2022, as it was a key driver for us to set up Pobl Tir Môr CIC.

Dilys, Ben and Lou

Pobl Tir Môr CIC

POBL TIR MÔR CIC

Pobl Tir Môr aims to connect people with the land, rivers and the sea, and different types of people and organisations with each other.

We passionately believe that involving people in decisions and projects that affect them and their community can make things work better.

And we want to make sure that a wide range of people are included in projects and decision making.

We also try hard to work in a way that maximises our individual strengths and is good for our well-being and the well-being of people around us.

To find out more visit
www.pobltirmor.wales



pobl tir môr



FFEITHIAU SYLFAENOL BASIC FACTS

Pembrokeshire is a county in south-west Wales with a population of around 123,000 people. The county town is Haverfordwest. Other towns include Pembroke, Pembroke Dock, Milford Haven, Fishguard, Tenby, Narberth, Neyland and Newport. The many villages in Pembrokeshire vary in size from tiny coastal hamlets like Cwm yr Eglwys in the north to Saundersfoot in the south, which has a population of 2,400 people.



SIR BENFRO 'GO IAWN' THE 'REAL' PEMBROKE SHIRE

Pembrokeshire is rightly renowned for its natural beauty and immense ecological value. However, the realities of growing up, living in and working in Pembrokeshire can be far removed from the image some people might have of the area.

TWRISTIAETH TOURISM

The public image and brand of Pembrokeshire has been very successfully developed over recent years by Visit Pembrokeshire and Visit Wales, as well as local tourism businesses and organisations.

Pembrokeshire is now a leading destination for activity, landscape and wildlife-based tourism. Visit Pembrokeshire research in 2022 suggested that the opportunities for wildlife viewing in Pembrokeshire were ranked amongst the Top 5% in the world.

Pembrokeshire's beaches are often voted as some of the best in the UK, it has the UK's only coastal National Park, and is home to iconic nature and wildlife.

YR HYN EFALLAI NA WYDDOCH AM SIR BENFRO WHAT YOU MIGHT NOT KNOW ABOUT PEMBROKESHIRE

Despite the natural splendour, life can sometimes be hard in Pembrokeshire.

Wages are lower than average, and some communities are amongst the most deprived in Wales.

Over half of Pembrokeshire is classed as 'Urban Town' or 'Rural Town and Fringe' according to the Welsh Government's Rural-Urban Classification, and 15% of households in Pembrokeshire (up to 40% in some areas) do not have a car. Public transport can be limited. This can make it difficult to access the very things that should make Pembrokeshire a great place to live and work.

Pembrokeshire can sometimes feel 'a long way away from anywhere' and many of the facilities and opportunities that people from other areas are used to are often not as readily available.

In parts of the county, access to healthcare is challenging and many health needs require travel to the neighbouring county of Carmarthen, Swansea or Cardiff.



An idyllic image of Pembrokeshire, from the Visit Pembrokeshire image library.



Dimond Street in Pembroke Dock, with one of the two large 'Sunderland Hangars' of the dockyard in the background. Pic: Drew Buckley



Pembrokehire - What you might not know

"Pembrokehire 'buys into people'"

"It's like its own little country"

Distinct communities

50% live in 'urban or town' areas

23% of children are educated in Welsh

Distinct Communities - not all that well connected?

Areas of Pembroke Dock, Haverfordwest, Pembroke + Milford Haven are in worst 20% for multiple deprivation in Wales

Pembrokeshire Supplies 25% of UK's petrochemicals + up to 30% of gas requirements

4.5% of properties are 2nd homes, up from 3.5% in 2011

National Park covers estuary + Preseli Hills as well as coast

Floating offshore wind offers an opportunity to move away from reliance on oil + gas jobs

60 County Councillors

67 town + community Councils

Many young people have a negative view of Pems

It's "at the end of the line"

15% don't have a car

Average house price is £230K (June 24)

Well off individuals include local 'baby boomers' + retired professionals (many from 'away')

Most children go to their local comprehensive

Lots of young people move away

It's hard to get a good job as a young person

Pembrokeshire has the highest proportion of Gypsy or Irish traveller in Wales.

Average wage in Pems is lower than Welsh average

Gas power Station produces enough electricity to power double the number of homes in Wales

There are plans for on + offshore hydrogen generation

Agriculture = 88% of land in Pems, although only employs 5% of population

Port of Milford Haven + Pembroke Dock dockyard are major industrial hubs

SEE ALSO

Pems Wellbeing Assessment 22

YR AMGYLCHEDD ENVIRONMENT

Pembrokeshire is a county of diverse geography, with spectacular beaches, rugged coastlines, and gentle hills, all packed into a relatively small 615 square kilometres. A significant feature is the Pembrokeshire Coast National Park which occupies more than a third of the county. The National Park includes the Preseli Hills in the north, the Cleddau Estuary, and the 186-mile (299 km) Pembrokeshire Coast Path. Nowhere in the county is more than 10 miles (16 km) from tidal water.

There are numerous small islands off the Pembrokeshire coast, the largest are Skomer, Ramsey, Caldey, Skokholm and Grassholm. The seas around Skomer and Skokholm, alongside other areas off the Pembrokeshire coast, are designated as a Marine Protected Area (MPA).

Pembrokeshire has 12 Special Areas of Conservation (SAC) including the Pembrokeshire Marine SAC, the Cleddau Rivers SAC, the North Pembrokeshire Woodlands SAC, Pembrokeshire Bat Sites and Bosherton Lakes SAC, the Preseli SAC, and St David's SAC. SACs are a Europe wide network of high-quality conservation sites that contribute to conserving the most important species and habitats across Europe.



Many people think of beaches and coast when they think of Pembrokeshire's National Park, but it actually includes coastal uplands such as the Preseli Hills, as well as much of the area around the Cleddau Estuary. Pic: Visit Pembrokeshire image library.

Special Protection Areas (SPAs) are protected areas for birds in the UK. SPAs in Pembrokeshire include Carmarthen Bay, Castlemartin Coast, Grassholm, Ramsey, St David's Peninsula Coast and 'Skomer, Skokholm and the seas off Pembrokeshire'. The islands of Skomer and Skokholm are home to the largest and most important breeding colonies of Manx Shearwater in the world.

The map on the next page shows the extent of the SAC and SPA designations in Pembrokeshire. It is based on data from the Natural Resources Wales Interactive Map Viewer.

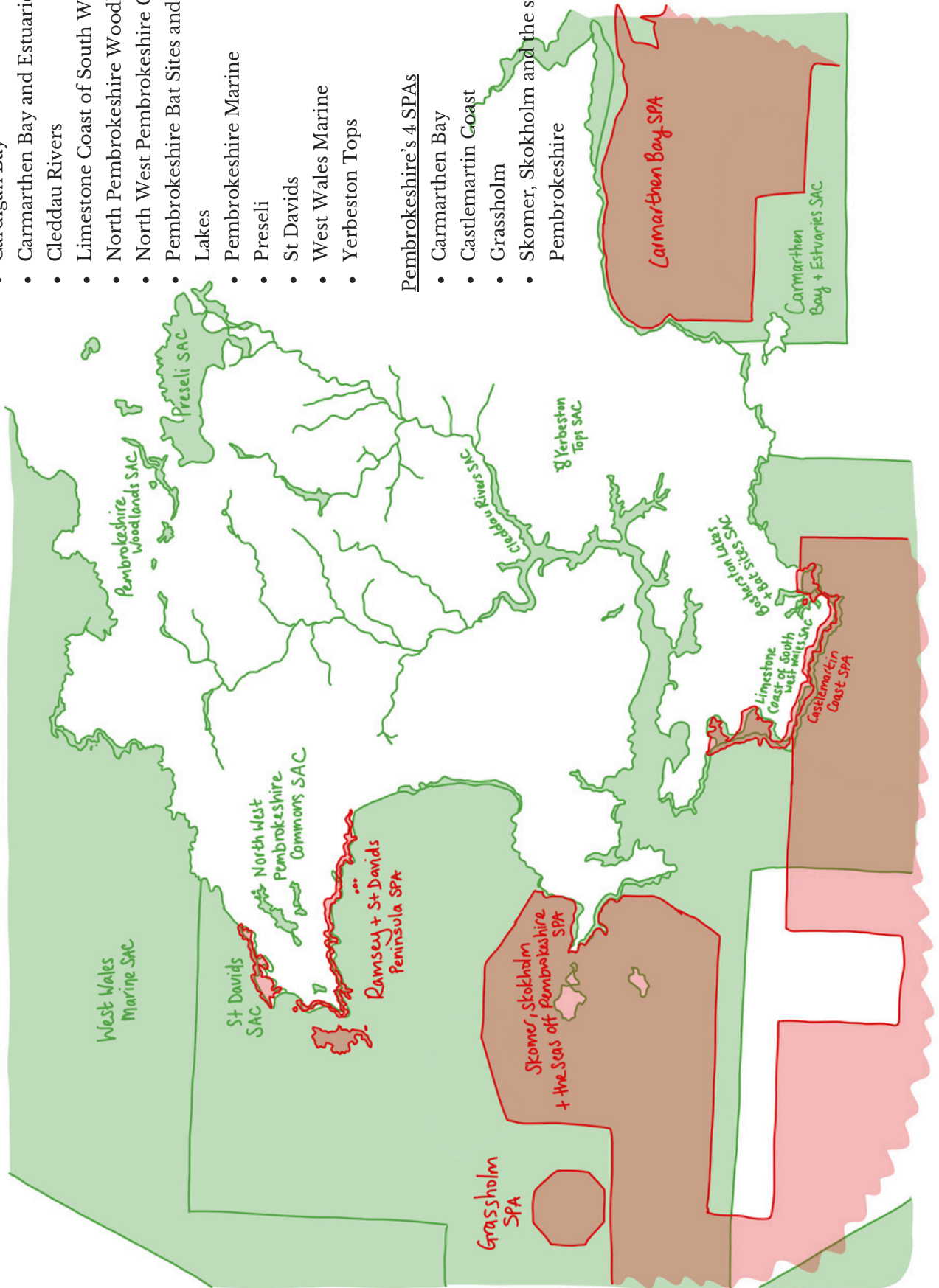
Pembrokeshire SAC and SPAs visual

Pembrokeshire's 12 SACs

- Cardigan Bay
- Carmarthen Bay and Estuaries
- Cleddau Rivers
- Limestone Coast of South West Wales
- North Pembrokeshire Woodlands
- North West Pembrokeshire Commons
- Pembrokeshire Bat Sites and Bosherton Lakes
- Pembrokeshire Marine
- Preseli
- St Davids
- West Wales Marine
- Yerboston Tops

Pembrokeshire's 4 SPAs

- Carmarthen Bay
- Castlemartin Coast
- Grassholm
- Skomer, Skokholm and the seas off Pembrokeshire



Like many places across the UK and beyond, Pembrokeshire's species and habitats are at risk from a variety of environmental pressures. These include pollution from industry, agriculture and urban areas, habitat loss and species mortality from development, climate change, disease and the challenges posed by invasive non-native species. The Cleddau river and Milford Haven waterway are considered to be in 'unfavourable condition'.

Despite these pressures, there are many initiatives focusing on land, rivers and the sea underway to restore and enhance Pembrokeshire's species and habitats. For example:

- Work is taking place to restore historic native oyster beds in the Milford Haven Waterway and seagrass meadows in Dale Bay.
- A Natur am Byth species recovery project for the rare woodland dwelling Barbastelle bat is being led by the Vincent Wildlife Trust.
- A new Nutrient Management Board aims to take a strategic approach to improving the Cleddau River.
- The Cleddau Project is a citizen led initiative running a variety of projects to try to help restore the river.



The Cleddau Project is campaigning to restore the health of our waterway from source to sea. Pic: The Cleddau Project

- Pembrokeshire Coastal Forum is a well established organisation with a number of programmes aimed at pulling stakeholders together to provide sustainable coastal solutions.
- The SWEPT citizen science initiative has twice organised a large number of volunteers to undertake coordinated water sampling across Pembrokeshire.
- Cwm Arian Renewable Energy, based in Crymych, has a number of energy and nature focussed projects.
- EcoDewi is pulling together citizens in St Davids to deliver environmental change.
- PLANED, based in Narberth, develop and deliver a range of community projects, including resilience, environment and greener living initiatives.

CYFRANIAD TWIRISTIAETH I'R ECONOMI CONTRIBUTUION OF TOURISM TO THE ECONOMY



Tourism constitutes a crucial part of Pembrokeshire's economy with approximately 6.6 million visits each year (of which 1 million stay overnight).

Tourism employs 22.9% of Pembrokeshire's population, and Bluestone National Park Resort is the second largest employer in the county with over 800 staff.

Although employment from tourism is largely seasonal and sometimes low paid, it contributes to a stable future jobs market in the area.

It is often said that "Pembrokeshire is definitely now on the map" and with this come both threats and opportunities for residents.

'Honeypot' destinations are starting to suffer from overcrowding and traffic management problems. Until recently, residents (with access to vehicles) were able to access the natural beauty spots of Pembrokeshire easily and at minimal cost. This is no longer necessarily the case during busy summer months.

Historically, house prices were also low compared to many other parts of Wales and the UK. This has changed in recent years, especially within the villages and rural areas.

The environmental and ecological impact of tourism also requires careful management. There are many places across the county where maintaining a sensitive balance between tourism and the environment is critical.

TWIRISTIAETH GYNHWYSOL INCLUSIVE TOURISM

The Pembrokeshire Coast National Park Authority and Visit Pembrokeshire are working together to develop an inclusive tourism offer in Pembrokeshire.

The aim is to make Pembrokeshire an exemplary destination offering services and facilities to local visitors and tourists with visible and hidden disabilities. In the UK alone, the purple pound (the spending power of disabled people and their families) is worth £274 billion and is estimated to be rising by 14% per year.

AMAETHYDDIAETH AGRICULTURE

Agriculture remains a cornerstone of Pembrokeshire's economy and Pembrokeshire contributes substantially to the UK's food production. Agriculture accounts for 88% of Pembrokeshire's land use, and in 2020 there were over 2100 active farms in Pembrokeshire.

The county's fertile lands support a variety of crops and livestock. Almost two thirds of the area farmed in Pembrokeshire is permanent pasture, and Pembrokeshire's green landscapes and favourable climate contribute to the production of high-quality dairy products.

DYFRAMAETHU AQUACULTURE

Aquaculture, the practice of farming seafood is potentially a growth industry for Pembrokeshire. Two local companies are leading the way - Atlantic Edge Oysters and Câr-y-Môr seaweed and shellfish farm both aim to improve the coastal environment through regenerative ocean farming.

PYSGOTA FISHING

As Pembrokeshire is surrounded on 3 sides by sea, it is unsurprising that Pembrokeshire has a long history of fishing and maritime activities that are deeply entrenched in the traditions of the county.

Most of the current Pembrokeshire fishing industry comprises vessels under 10 metres fishing within a 6 mile limit (Fisheries Local Action Group).

The main seafoods processed in Pembrokeshire are shellfish, predominantly crab and lobster.



*Câr-y-Môr aims to improve the coastal environment by regenerative ocean farming.
Pic: Câr-y-Môr Community Benefit Society.*

PORTHLADD YMDDIRIEDOLAETH TRUST PORT



Milford Haven is the largest port in Wales, the third-largest port in the United Kingdom and the UK's leading energy port (it handles 29% of Britain's seaborne trade in oil and gas). Shipping operations in Milford Haven are managed by the independent Milford Haven Port Authority which is a Trust Port.

A Trust Port is an independent body, governed by a specific Act of Parliament. As a Trust port, there are no shareholders and profits are reinvested to support the long-term viability of the business for future generations.



Pembroke Dock Marine aims to build upon the region's existing facilities and extensive skill base to establish a world-class base for marine energy and engineering. Pic: Drew Buckley

YNNI MOROL MARINE ENERGY

Since 2009, there has been significant activity in the marine energy sector in Pembrokeshire. This was originally driven by an emerging awareness of Pembrokeshire's significant wave and tidal resource, alongside 100.4 million euros of ERDF (European Regional Development Fund) funding allocated for the development of the sector in 2014.

Parts of the old dockyard at Pembroke Port in Pembroke Dock have been transformed to harness the opportunities from marine renewables and there are 4 sites within the Milford Haven waterway designated as part of a Marine Energy Test Area (META).

More recently (2022), the Crown Estate designated 3 areas in the Celtic Sea (the area of seabed between Wales, Ireland and Cornwall - approximately 30 km off the coast of Pembrokeshire) for floating offshore wind turbines. The Crown Estate intends to award seabed leases to project developers to deliver up to 4.5GW of floating offshore wind in the Celtic Sea by 2035.

PORHLADDOEDD PORTS

Alongside the natural beauty of Pembrokeshire is the industrial heritage of the Milford Haven waterway. Founded in 1793, the Milford Haven Waterway is the second deepest natural harbour in the world (Sydney, Australia is the deepest). It has a rich maritime history and significantly, in 1814 the Royal Navy Dockyard was constructed in what is now Pembroke Dock. Irish Ferries operate a service to Rosslare from Pembroke Dock.

Pembrokeshire's second port is Fishguard, which is home to the Stena Line ferries to Rosslare. An increasing number of cruise ships call at Fishguard, and occasionally Milford Haven, from where most passengers are taken by bus to Pembrokeshire's most famous spots.



OLEW A NWY OIL AND GAS

In the 1950s, the oil industry arrived and oil refineries became a fixture on the Pembrokeshire coast line. The depth of the waterway enabled large tankers to transport in thousands of tonnes of crude oil for the refineries to make different petroleum products. The oil industry has provided significant jobs and economic benefits for the county over the years, but now only the gas fired power station (RWE) and one refinery (Valero – Pembrokeshire's largest employer) remain.

In 2002, the Liquefied Natural Gas (LNG) industry started to use the port of Milford Haven for its transportation. Two LNG terminals now operate from the Port – Dragon LNG and South Hook LNG.

Up to 20% of the UK's energy is supplied by members of the Milford Haven Waterway Future Energy Cluster, which include energy companies, renewable developers and green technology innovators.



Aerial view of the Cleddau Estuary from Pembroke Dock, with the power station, an LNG terminal and the oil refinery just about visible in the background. Pic: Owen Howells Photography.

PORHLADD RHYDD CELTAIDD CELTIC FREEPORT

With ambitious floating wind and green and blue hydrogen plans, there is an ambition for Pembrokeshire to become the green energy capital of the UK.


In 2023, Milford Haven became part of the Celtic Freeport, alongside Port Talbot. The plans for the Celtic Freeport focus on low carbon technologies, carbon capture, utilisation and storage (CCUS) and biofuels to support the accelerated reduction of carbon emissions. The freeport aims to attract significant inward investment and create an additional 16,000 jobs.

CLWSTWR DIWYDIANNOL DE CYMRU SOUTH WALES INDUSTRIAL CLUSTER

The South Wales Industrial Cluster (SWIC) is a group of many of the large industrial businesses in South Wales (including RWE, Valero, Port of Milford Haven).

SWIC has ambitious plans to achieve:

- Net zero industries in South Wales by 2040, equating to 40% reduction of current Welsh CO2 emissions
- Safeguarding of 113,000 jobs and a net positive increase in jobs overall
- Unlocking £30bn investment opportunities in the region



“The journey towards realising the Celtic Freeport’s full potential is not one to be undertaken alone. It is a collective voyage, necessitating the active participation and support of both local businesses and communities.”

Luciana Ciubotariu, CEO Designate, Celtic Freeport,
writing in Business News Wales 7 May 2024

There are many planned changes to Pembrokeshire’s energy and industrial landscape which could be transformational for Pembrokeshire’s economy.

The extent to which Pembrokeshire benefits from these developments depends on a many factors, not least the extent to which the local and wider Welsh supply chain can be supported and mobilised.

CYMDEITHAS A HUNANIAETH SOCIETY AND IDENTITY



Taking a 30-minute car journey through Pembrokeshire could mean travelling from communities where Welsh is seldom heard, to ones where it is common as a first language, taught as a first language to children from 3-18 and a key part of people's identity.

You could drive from coastal villages full of holiday homes and houses worth well over a £1m to large council estates, where levels of multiple deprivation are high and impact people's life chances.

Alternatively, you could go from rugged landscapes where few man-made structures are visible to large industrial complexes.

Pembrokeshire's different communities can be as diverse as its' landscape, and sometimes feel not very well connected with each other.



Valero Oil Refinery. Pic: Owen Howells Photography.

Geographically, Pembrokeshire lies as far into Wales as it is possible to go but historically the south of the county has been aligned with England in many ways.

These roots likely stem from the Normans who set up an outpost here as far back as 1093. The foundation of the famous British Tudor dynasty occurred following the birth of King Henry VII in Pembroke Castle in 1457.

Some have described Pembrokeshire as “Little England beyond Wales”, although this title can be considered offensive, particularly by those living north of the ‘Landsker line’ (see below).



Coastal farmland. Pic: A J Manning



Tenby town and harbour. Pic: Owen Howells Photography.

YR IAITH CYMRAEG WELSH LANGUAGE

17.2% of residents of Pembrokeshire are able to speak Welsh according to 2021 census data (although 30.2% said in the most recent Annual Population Survey that they could speak Welsh).

The north is traditionally a Welsh language stronghold with the Landsker line being the term used for the invisible border that divides the largely Welsh-speaking and largely English-speaking areas.

It is rare to hear Welsh spoken openly in the south of the county, but Welsh language use is increasing in the county, and several new Welsh medium education schools have recently been built.

OEDRAN AC ETHNIGRWYDD AGE AND ETHNICITY

The Pembrokeshire Public Service Board (PSB) Well-Being Assessment 2022 highlights that Pembrokeshire has an ageing population, which will have impacts on public services and the local labour market. Population projections suggest that the number of people aged 80 or over will increase significantly by 2040.

The Well-Being Assessment also highlights that Pembrokeshire is amongst the least ethnically diverse areas in Wales, although this is very slowly starting to change, particularly in some communities (Pembrokeshire is 97.6% white overall, some areas are 99% white, others have more than 10% from the global majority). Pembrokeshire has the highest proportion of people from a gypsy or Irish traveller background in Wales.

In 2020 the local Muslim community began fundraising for a mosque in Haverfordwest. An old sprawling office building is now the centre of the Muslim community in the area, and includes a successful and well attended youth club (with 50% of attendees non-Muslim, as the youth club welcomes friends of young Muslims).

Haverfordwest Mosque occupies an old office building. An extensively repaired and renovated historic building is home to the Hamad Bin Khalifa Islamic Centre in Milford Haven, which invites others to visit and learn about Islam. Pic. Haverfordwest Mosque



TLODI, TAI, GOFAL IECHYD AC ADDYSG POVERTY, HOUSING, HEALTHCARE AND EDUCATION

There are areas of severe poverty, with Pembroke Dock, Pembroke, Milford Haven and Haverfordwest home to communities considered to be among the most deprived in Wales according to the Welsh Index of Multiple Deprivation.

Rural poverty tends to exist in pockets and is often hidden, making it even more difficult to identify and address. Social exclusion and isolation can be exacerbated in rural areas by low income and lack of access to public transport. Pembrokeshire's Child Poverty rate is among the top five highest rates in Wales.

Pembrokeshire College is a modern facility offering a wide range of courses including A-Levels, other courses for school leavers, adult learning and transition courses, including an Additional Learning Needs transition course.
Pic. Pembrokeshire College



Access to and quality of healthcare varies across the county, and there are significant challenges experienced by individuals accessing these services. There is no doctor led labour ward in Pembrokeshire with many expectant mothers electing delivery at Glangwili. Unwell children are often directed directly to Glangwili in Carmarthenshire. Ambulance waiting times are high, often a minimum of 4 hours. Individuals working within the service are dedicated, but extremely stretched.

Organisations such as Pembrokeshire Association of Voluntary Services (PAVS) and Planed are exploring ways in which the community could take a lead in solving health and social care issues.

Most young people in Pembrokeshire attend their local primary school, followed by their local secondary school. There are two small private schools in the county.

Many young people leave the county to access tertiary education, particularly those with university aspirations as there are no universities in the county. Pembrokeshire College in Haverfordwest has a good reputation with 14,500 students studying full or part-time courses.

SIR BENFRO MEWN BYD SY'N NEWID PEMBROKESHIRE IN A CHANGING WORLD

Pembrokeshire could be perceived as an isolated county, lying far west into Wales and a 5 hour car or train journey from London. A weekend escape or an annual holiday for many, away from the challenges of everyday life in busier places.

And yet, in an interconnected world, Pembrokeshire is affected by many of complex global, human and ecological factors which affect the future of the county and our place as individuals living within it.

Likewise, our behaviours and actions within Pembrokeshire have wider consequences, with repercussions beyond the boundaries of our geographically remote county.

Cornerstones of the Pembrokeshire economy, the industries of tourism and agriculture are fundamentally underpinned by healthy, functioning ecosystems.

In 2021, the Welsh Government declared a nature emergency, becoming one of the first parliaments globally to do so. Approximately 17% of species in Wales are at risk of extinction.

The International Panel on Climate Change's 2023 report concludes that human activities have unequivocally caused global warming which is affecting weather and climate extremes across the globe.

Addressing climate change requires a seismic shift in the way we currently generate and use energy, and it is encouraging to see true commitment in Pembrokeshire towards making the required changes to our energy system. And yet, these changes must be made not just with an end goal of emissions reduction, but the transition must also be just and equitable, enhancing the well-being and resilience of the individuals and communities who live, work and play here.

SIR BENFRO SY'N GYFRIFOL AR LEFEL FYD-EANG A GLOBALLY RESPONSIBLE PEMBROKESHIRE

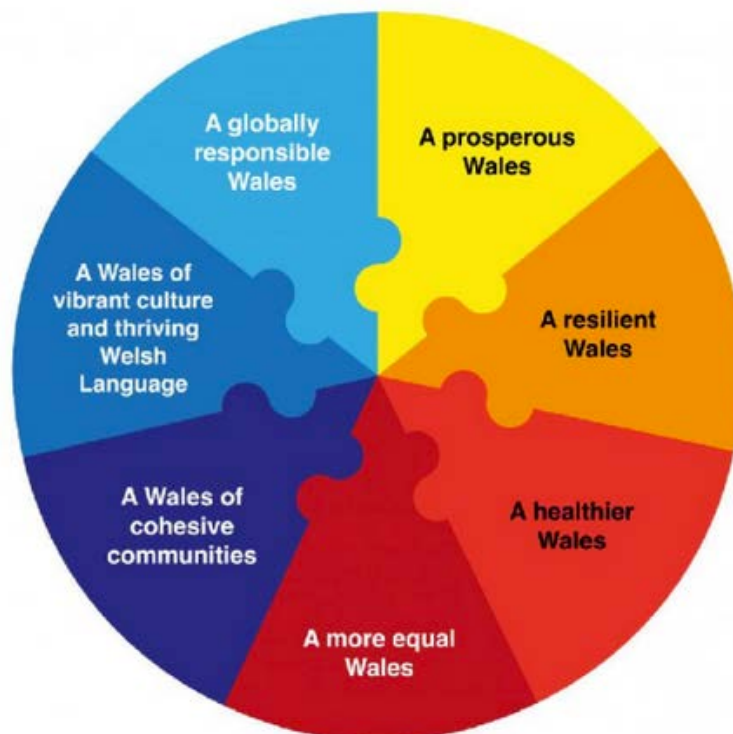


Pembrokeshire is one of 22 counties in Wales. In 2015, the Welsh Government passed into law the Well-being of Future Generations (Wales) Act. This Act is the first legislation in the world to enshrine the rights of future generations alongside current generations, making the well-being of the current and future people of Wales the core purpose of government.

At Pobl Tir Môr we feel a strong sense of 'Cynefin' for Pembrokeshire. Cynefin is a Welsh word which can be translated as 'the place where we feel we belong, where the people and landscape around us are familiar',

We are inspired by our own experiences of working in the community and sustainability sectors across Pembrokeshire and beyond. We take inspiration from the Welsh Government's Well-Being of Future Generations Act and feel proud of the fact that Wales was the first country to make the well-being of current and future generations the principle at the heart of government.

By embedding these principles into our everyday work, we hope to help make this policy a reality. Our small team at Pobl Tir Môr has a passion for knowledge, learning, delivering meaningful projects and making good things happen.



Pic: The Well-Being of Future Generations Act goals

RÔL POBL TIR MÔR THE ROLE OF POBL TIR MÔR

We want to work with others, learn from others, and share this learning and experience along the way. We want our communities to work better for people and for the planet. We want to support a just transition of the energy sector to renewables and help ensure agriculture, aquaculture and tourism develop in a sustainable way.

By bringing together professionals and community members with lived experience, knowledge and expertise at the community level, we hope to shape the policies, plans and projects that will deliver for people and the planet.

CYSYLLTU Â NI CONTACT US

We'd love to hear from you if you have any thoughts, comments or reflections on this document, or if you'd like to work with us to help make Pembrokeshire a better place for people and planet.

Contact us at info@pobltirmor.wales

