

Agenda – Economy, Trade, and Rural Affairs Committee

Meeting Venue:

Committee room 5 – Tŷ Hywel
and video conference via Zoom

Meeting date: 18 March 2026

Meeting time: 09.30

For further information contact:

Robert Donovan

Committee Clerk

0300 200 6565

SeneddEconomy@senedd.wales

Hybrid

Private pre-meeting

09.25 – 09.30

Public session

09.30 – 09.35

1 Introductions, apologies, substitutions, and declarations of interest

09.30

2 Papers to note

09.30 – 09.35

2.1 Economy, Trade and Rural Affairs Committee report: Bringing home the harvest: Supporting the Welsh food processing industry

(Pages 1 – 15)

Attached Documents:

Welsh Government response – 26 February 2026



2.2 The Sea Fisheries (Amendment) Regulations 2026

(Page 16)

Attached Documents:

Letter from the Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs – 27 February 2026

2.3 Inter–Institutional Relations Agreement

(Pages 17 – 19)

Attached Documents:

Meeting of the Inter–Ministerial Standing Committee – Letter from the Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs to the Chair of the Legislation, Justice and Constitution Committee – 2 March 2026

Meeting of the Inter–Ministerial Standing Committee – Letter from the Cabinet Secretary for Economy, Energy and Planning – 3 March 2026

Memorandum of Understanding (MoU) between the Welsh Government, the North Sea Transition Authority (NTSA) and the UK Government – Letter from the Cabinet Secretary for Economy, Energy and Planning to the Chair of the Legislation, Justice and Constitution Committee – 9 March 2026

2.4 Follow–up from the General Ministerial Scrutiny session held on 25 February 2026

(Pages 20 – 26)

Attached Documents:

Letter from the Chair to the Cabinet Secretary for Economy, Energy and Planning, and the Minister for Culture, Skills and Social Partnership – 3 March 2026

Letter from the Cabinet Secretary for Economy, Energy and Planning, and the Minister for Culture, Skills and Social Partnership – 12 March 2026

**2.5 Development of Tourism and Regulation of Visitor Accommodation (Wales)
Bill – Revised Explanatory Memorandum**

(Pages 27 – 28)

Attached Documents:

Letter from the Cabinet Secretary for Finance and Welsh Language – 6 March
2026

**2.6 Follow-up from the General Ministerial Scrutiny session held on 5 March
2026**

(Pages 29 – 31)

Attached Documents:

Letter from the Chair to the Deputy First Minister and Cabinet Secretary for
Climate Change and Rural Affairs, and the Cabinet Secretary for Economy,
Energy and Planning – 10 March 2026

2.7 Apprenticeship pathways

(Pages 32 – 33)

Attached Documents:

Letter from the Minister for Further and Higher Education – 11 March 2026

**3 Motion under Standing Order 17.42(vi) to resolve to exclude the
public from the remainder of the meeting**

09.35

Private session

09.35 – 10.30

4 Legacy report: Consideration of draft report

09.35 – 10.30

(Pages 34 – 62)

Attached Documents:

Draft report



Food Processing Inquiry

The Welsh Government
Response to the Economy,
Trade, and Rural Affairs
Committee report.

The Economy, Trade, and Rural Affairs (ETRA) Committee published its report, 'Bringing home the harvest: Supporting the Welsh food processing industry,' on 20 January 2026 with six recommendations for the Welsh Government.

This is the Welsh Government's response to those recommendations.

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Introduction

The Committee began its Inquiry into Food Processing on 8 May 2025 and in particular, considered these areas under the Inquiry's Terms of Reference:

- The Welsh Government's performance in delivering against the objectives in its Vision for the Food and Drink Industry.
- Whether the objectives in the Vision for the Food and Drink Industry remain fit for purpose or whether they should be revised.
- The effect decreasing numbers of livestock have on the ability of the processing sector to add value to Welsh produce.
- What the Welsh Government can do to further support the processing sector to increase added value for food products in Wales, particularly for the red meat, dairy, and horticulture sectors; and
- The barriers to increasing the public procurement of food processed in Wales.

The Committee's report focuses on these areas, with an additional recommendation related to seafood following stakeholder evidence.

We acknowledge the Committee's important work in this area and outline our response to its recommendations below.

Response to the six recommendations

Recommendation 1

The Committee recommends that:

The next Welsh Government must coordinate its approach to the food system by ensuring policies are joined up and complementary. This must include ensuring the food processing sector is supported to both help businesses grow and ensure Welsh providers can service the Welsh market. To do this, they must create an overarching and holistic strategy for the whole food system designed to support the aims of the Vision and align Government food policy, promote the food processing sector, and prioritise sustainability and food security.

Response: Reject

The current Welsh Government maintains a joined-up, whole-system approach across its existing policies. We do not agree there is a need for the creation of an additional “overarching and holistic strategy” which could result in duplication and overlap with existing policies, or diversion from the existing policy priorities. Any future decisions on this will be a matter for the next Welsh Government. We recognise the importance of a coordinated approach to the food system. All current policies are designed to be complementary, and Welsh Ministers are subject to a statutory duty under the Well-being of Future Generations (Wales) Act to carry out sustainable development. This requires policies to align with the Act’s well-being goals and sustainable development principle.

The Welsh Government already provides a coordinated package of support for food and drink manufacturers through the Food and Drink Wales offer, which brings together sustainability, climate resilience, technical advice and supports business growth. This underpins a whole-system approach by helping processors consider the wider supply chain, improve environmental performance, strengthen resilience to climate risks, and remain competitive, aligning with wider food security and sustainability objectives.

A joined-up approach to food system sustainability is supported through services such as the free carbon reporting offer (Carbon Reduction Pilot), which provides funded technical advisory support to food and drink businesses. This enables businesses to establish a carbon baseline, identify emissions hotspots, and

develop robust carbon reduction plans with clear actions to reduce emissions across processing, packaging, and distribution.

From April 2026, the new Climate Resistant Food Security Service will ensure that food processors and manufactures have access to the latest research on adaptation and resilience. This service will support businesses to grow sustainably and contribute towards strengthened food security in Wales. Alongside this long-term work, we also take forward a wider programme on emergency-related food risks that includes our role within the Wales Resilience Framework and our broader engagement with partners on supply chain vulnerabilities and crisis preparedness.

Key mechanisms supporting a coordinated whole system approach include:

- Our Vision for the Food and Drink Industry provides a strategic framework for the sector, taking a whole-system approach to meeting the wide-ranging needs of food and drink businesses. It strengthens business resilience through aligned through action on sustainability, productivity and skills, delivered in collaboration with industry, government, and academia to ensure coherence across the supply chain. To support sustainable food production and increase food resilience, the Welsh Government's [Community Food Strategy](#), and [Sustainable Farming Scheme](#) complement 'the Vision's' ambition.
- The First Minister established the Food Forum in June 2023 to improve coordination and oversight of food-related work across government. It brings together officials from portfolios including Agriculture, Education, Health, Fisheries, the Circular Economy, the Foundational Economy, Skills, Tackling Poverty and Fair Work. It has supported delivery of key Programme for Government commitments including the Community Food Strategy (published 29 April 2025), by improving join up and communication across departments.
- Food Matters: Wales was published on 22 July 2024 to provide a summary of food related policies across our portfolios for stakeholders. It demonstrates how these policies connect through the Welsh Government's well-being objectives, which maximise our contributions to Wales' seven long-term national well-being goals under the Well-being of Future Generations (Wales) Act.

[The Healthy Weight: Healthy Wales \(HWHW\) delivery plan for 2025 to 2027](#) also supports the food processing sector through reformulation, healthier product innovation, and shifting retail incentives away from products high in fat,

sugar, and sugar (HFSS), to benefiting healthier food produce, including items supplied through short supply chains. This provides regulatory clarity on product presentation and promotion and embeds processors within a whole-system approach to population health.

Financial implications: None

Recommendation 2

The Committee recommends that:

The next Welsh Government should look at how it can support Welsh abattoir and food producers to ensure relatively low carbon Welsh meat can be served on Welsh plates, to avoid destocking Welsh farms but importing lower quality, lower welfare, and higher carbon meat. They should give serious consideration to the stocking density of Welsh livestock farms and consider introducing a headage scheme similar to the Scottish Suckler Beef Support Scheme.

Response: Accept

The Welsh Government recognises that a stable and sufficient supply of livestock is essential to the viability of the red meat and dairy processing sectors in Wales. We recognise that there has been a declining trend in domestic beef and sheep populations across the UK over the last twenty years. However, whilst beef and sheep population numbers have declined, production has remained relatively stable since 2008.

Food is one of the foundational sectors of our economy and our climate is better suited than many other parts of the world to producing sustainable, high-quality red meat. Our Sustainable Farming Scheme supports farmers produce food in a way that has a low carbon footprint. This will allow us to become one of the best countries in the world for sustainable farming, meeting our global obligations without offshoring food production to countries with lower standards.

Improving farm efficiencies and embracing scientific innovation - while stabilising numbers and maintaining the production of high-quality, sustainable food with healthier and more productive animals - is a key Welsh Government objective, with the main driver being the Sustainable Farming Scheme. Through the optional layer, the proposed SFS aims to incentivise on farm efficiency and productivity to adopt more effective practises to reduce Greenhouse Gas (GHG) emissions and improve the productivity of the beef sector.

Phase one will look to introduce actions to reduce the Age at Slaughter and Sire Registration – both for the beef sector. Phase two is looking for the continuation of other targeted support to increase efficiency.

The sustainable production optional action will support all the Sustainable Land Management (SLM) objectives with a focus on sustainable food production.

We are proposing a suite of actions which are focused on supporting improved efficiency and sustainability of enterprises, whilst at the same time, reducing greenhouse gas emissions, responding to the climate and nature emergencies, and building resilience.

Financial Implications - this work is ongoing and will be accommodated within existing budgets.

Recommendation 3

The Committee recommends that:

The Welsh Government should adopt Food Policy Alliance Cymru's ambitious target of 75% of vegetables consumed in Wales to be produced here sustainably. To achieve this, the Welsh Government must invest in horticultural business, support the development of horticultural skills, and make a specific effort to improve horticultural food processing infrastructure.

Response: Reject

The Welsh Government shares a high ambition to grow our horticultural sector. However, a target of 75% of vegetables consumed in Wales to be produced here sustainably may not be suitable or deliverable due to the seasonality of vegetable growing in Wales.

We strongly agree with the objective of increasing the sustainable production of vegetables in Wales through co-ordinated policies to improve the profitability, efficiency, and environmental impact of the horticulture sector.

We have been working with sector stakeholders to improve planning guidance for local authorities in Wales when dealing with applications from horticultural businesses. This should improve the dynamism of these businesses, allowing them to make efficiency improvements more quickly. This work is linked to capital grants schemes the Welsh Government have developed in the last few years to help the sector. The Small Grants – Horticulture Start Up and Agricultural Diversification and Horticulture Schemes have enabled growers to invest in equipment to increase sustainable fruit and vegetable production.

The work of the Farming Connect advisory service has been instrumental in driving growth in the horticultural sector. This service gives farmers

comprehensive advice and training to improve business performance, as well as providing a valuable forum for peer-to-peer learning and industry insight. The service has seen a 52% increase in the number of horticultural enterprises registered with them since 2023.

Farming Connect can advise growers on market access. While increasing the proportion of home-grown vegetables consumed in Wales, we need to be mindful of ensuring there is demand to meet the supply. Public procurement has a role to play in this, with the Welsh Veg into Schools project being a notable success story in increasing domestic consumption. The Welsh Government wishes to continue to support the sector to identify these market opportunities and encourage sustainable growth while avoiding market distortion and the potential risk to businesses from overproduction.

Financial implications: None

Recommendation 4

The Committee recommends that:

The Welsh Government should set out any work it has undertaken to support the Welsh seafood processing industry and to encourage the consumption of Welsh seafood domestically.

Response: Accept

The Welsh Marine and Fisheries Scheme aims to ensure sustainable growth in the fisheries and aquaculture sector to support coastal communities prosper. The scheme is designed to create opportunities within the marine environment, coastal communities, and sustainable seafood across the whole supply chain, from production to processing and marketing. Previous grant rounds funded processing-related items such as ice machines, weighing systems and efficiency-boosting equipment.

The Welsh Government focuses on sustainable fish stock management through Fisheries Management Plans (FMPs). FMPs are a requirement of the Fisheries Act 2020 and the UK Joint Fisheries Statement (JFS). FMPs are a key tool to support a sustainable, resilient, well-managed fishery. Retaining stocks within sustainable limits will ensure our fishing communities, the seafood supply chain and wider society continue to benefit from our natural assets, now and into the future in line with the Well-being of Future Generations Act 2015.

We have commissioned a socio-economic study of Welsh fisheries, including seafood processors, to inform future support and policy decisions. The study gathers data from processors, wholesalers, and coastal communities to shape more targeted support and ensure sector resilience.

All local authorities and/or governing bodies have discretion over menu design and delivery of meals within the parameters set out both within the Healthy eating Regulations and the accompanying Statutory Guidance Revised Regulations as they apply to all maintained nursery and primary schools, were laid before the Senedd on 17 December 2025 and are expected to come into force on 31 October 2026. These Regulations will ensure that school meals consider the latest UK dietary recommendations and provide healthier, balanced options that support long-term wellbeing.

The revised Regulations set the minimum requirement of fish on a school menu as once every four weeks. The accompanying Statutory Guidance promotes the procurement of sustainably sourced fish.

We are committed to increasing the use of locally produced Welsh food in schools and have driven growth in local sourcing through Universal Primary Free School Meals and wider investments.

Financial Implications: None

Recommendation 5

The Committee recommends that:

The Welsh Government must ensure it has a strategic plan to ensure there is a “team Wales” approach between producers, processors, retailers, and hospitality and that food processing is firmly supported and allowed to play its vital role in the foundational economy. A key part of this work should be exploring how they can fill the ‘missing middle’ gap in Welsh food production and encourage our excellent micro businesses to grow.

As part of this they should:

- Examine what lessons can be learnt from the Irish approach set out in Food Harvest 2020 and to picking winners.
- Develop programmes to help food processing businesses upskill their employees and to allow people to learn innovative or underused food processing skills to fill gaps in the Welsh food processing market.

- Review the food processing infrastructure offer across Wales, identify gaps, and set out a plan to fill them in order to strengthen local supply chains and retain GVA; and
- Consider how it can address the market failure caused by relatively lower property prices making it harder for many Welsh businesses to access loans against capital investment in the food processing sector.

Response: Reject

Collectively, the Food and Drink Wales offer provides a strategic, whole-system package of support that strengthens domestic food processing capability, and resilience. This includes improving sustainability, supporting productivity and innovation, and enabling collaboration across producers, processors, retailers and hospitality – directly contributing towards a 'Team Wales' approach.

Our support focuses on the 'missing middle' by connecting SMEs with tailored technical expertise, productivity and innovation support through Wales's food centres, delivery partners, and cluster networks. Cluster networks such as the Sustainability Cluster and the climate resilience offer promote collaboration, shared learning, and continuous improvement.

We provide fully funded, onsite training for food processing and manufacturing businesses to build climate adaptation awareness and resilience. This support is available to businesses of all sizes.

The Vision for the Food and Drink Industry provides the overarching strategic framework that underpins Welsh Government support for government-industry-academia collaboration, embedding food processing within the foundational economy.

On the Committee's reference to Food Harvest 2020, future Welsh Government business support will be a decision for the next Welsh Government. Our current business support model delivers practical, agile support tailored to each business's needs. Programmes including Enterprise for Success, Investor Ready and Scale-Up support Welsh firms at different stages of maturity, including micro and small firms with growth potential to access investment, improve productivity, and make informed, long-term decisions. Metrics such as gross value added, return on capital employed and jobs generated track sector performance.

Targeted capital schemes, including the Food Business Accelerator Scheme support performance improvements, competitiveness, sustainability, and efficiency. To respond to consumer demand, we encourage diversification, and identify, exploit and service new emerging and existing markets. These

schemes provide capital investments for processing equipment, to modernise facilities, boost sustainability, and support sector-wide growth and supports projects that offer clear and quantifiable benefits to the food and drink industry in Wales. These investments build a more sustainable production infrastructure across Wales, aligning with wider Welsh Government climate goals. An independent evaluation of previous food sector schemes delivered under the Rural Development Programme shows they leveraged over **£45 million** of investment that would not otherwise have taken place, enabling increased capacity, improved efficiency, and earlier investment decisions.

Our National Helix Programme makes Wales different through the delivery of specialist support across Wales. This support is channelled through four food centres focused on process efficiency, new product development, reformulation, and accreditation. Our cluster programme strengthens collaboration, innovation, and supply chain resilience, with over 800 growth businesses engaged in the past year.

Workforce development is supported through the Food and Drink Skills Wales programme, offering diagnostics, funded training, and tailored workforce support. This supports existing employees progress, address skills gaps and create new career opportunities within the industry. Since March 2025, the sector jobs noticeboard has advertised over 1,600 vacancies, strengthening labour supply and attracting new talent.

Our Retail and Foodservice Plan supports the food processing industry by improving market access and has informed our Food and Drink Trade Programmes. This approach has increased the Welsh offer in the UK domestic market for retail, foodservice, and hospitality. We are proud of these collaborative partnerships developed under the 'Food and Drink Wales' brand and have secured buy-in for Welsh products from all major retailers and larger foodservice businesses.

In 2022, we conducted the first Major Retailer Audit Report to identify the number of Welsh product listings at major supermarkets and stores in Wales. Our most recent review in Autumn 2024 revealed that since 2022, product listings have increased by 143%. Since 2024, we have supported more than 70 Welsh businesses access new markets, with approximately 2,500 Welsh product lines listed in Wales and the UK, worth over £8m in sales. We continue to engage with wholesalers in Wales and those who service the hospitality sector to increase Welsh produce on menus.

In February 2026, the Welsh Government announced circa 4,400 hospitality businesses will be eligible for 15% relief on their rates bills in 2026-2027 to support hospitality businesses through a period of rising costs and changing consumer

habits. The Welsh Government is providing up to £8 million for the package, using funding from the UK and Welsh Governments. This support for Food and Drink hospitality comes on top of substantial existing support. Upwards of half of pubs in Wales already benefit from Small Business Rates Relief, and over a quarter pay no rates at all. The Welsh Government's permanent reliefs are worth £250 million every year.

Export development and foreign investment programmes support international trade by promoting Welsh food and drink to buyers, wholesalers, and distributors to attract inward investment, and support business risk diversification, innovation, and job quality. Our export programme has evolved to provide a more strategic, step-by-step approach to market development, delivering impactful support to key international markets. The Blas Cymru/Taste Wales brokerage generates business opportunities for Food and Drink businesses domestically and internationally. Last year, it hosted the trade buyers from leading UK retailers, foodservice operators, and global buyers with over 2,700 trade meetings. These new important trade links have already resulted in over £45 million in new business opportunities. At the Royal Welsh Show, the Food and Drink Wales Trade Business Lounge further supports buyers to identify Welsh suppliers.

All 22 Local Food Partnerships across Wales have been awarded grant funding that places us on course to achieve the published commitment in the Community Food Strategy to provide over £2m of support in this financial year. These partnerships design and implement their own food projects to target local needs and create collaborations across key local food stakeholders. This support is critical for strengthening local food networks and for delivering community-led food solutions. Up to £240,000 has been made available for Local Food Partnerships to collaborate on larger projects with a shared interest. For example, Bwyd Powys is leading a project covering Mid and West Wales including four Local Food Partnerships to develop a pioneering food resilience strategy as well as delivering activity to start to address this challenge on the ground.

There are 24 Welsh products with UK Geographical Indication (GI) Status including Welsh lamb and Welsh beef. These designations anchor processing in Wales, support price premiums, strengthen exports and help retain economic value and skilled employment.

Welsh Government supports an SPS agreement and continues working with the other UK administrations to secure arrangements that reduce friction for Welsh food producers and processors while maintaining strong biosecurity. We ensure Welsh interests are represented in all UK trade negotiations, pressing for outcomes that protect Wales' high standards in animal health and welfare, traceability, the environment, and food safety. We safeguard the competitiveness

of Welsh food businesses by emphasising the need for a level playing field— imports produced to lower standards must not gain an unfair economic advantage, and new trade agreements must not undermine our essential trading relationship with the EU.

Finally, our Market Insight Programme provides food and drink businesses with data on retail, grocery, and out-of-home trends, supporting informed decision-making and strengthening competitiveness.

Financial Implications – None

Recommendation 6

The Committee recommends that:

Welsh Government should expand successful schemes supporting public procurement and integrating public sector purchasers into local supply chains, in order to realise the objectives of the Social Partnership and Public Procurement (Wales) Act.

Response- Accept

Through statutory duties, procurement policy frameworks, practical procurement guidance, business support programmes, and evidence-led interventions, the Welsh Government actively supports the integration of public sector purchasers into local supply chains.

For example, we are strongly committed to increasing the use of locally produced Welsh food in schools, recognising its nutritional, educational and economic value. Through Universal Primary Free School Meals and wider foundational-economy investment, the Welsh Government has driven growth in local sourcing, with public procurement of Welsh food more than doubling since 2021 and Welsh wholesalers reporting a 173% increase in local authority spend on Welsh produce between 2021 and 2024.

This commitment is being realised through collaborative work with local authorities, producers, and wholesalers to diversify supply chains, pilot innovative approaches such as the Welsh Veg in Schools project, and embed sustainable procurement principles that shorten supply chains, reduce food miles and support Welsh growers, farmers, and manufacturers.

Further, in supporting the implementation of the revised Healthy Eating in Schools Regulations coming into force this October, we will collaborate with local

authorities and the Welsh school food supply chain to maximise opportunities to source local products onto school plates.

The Community Food Strategy includes a commitment to increase the amount of Welsh public sector spend on food of Welsh origin by at least 50% by 2030. To this extent, Foundational Economy funded food projects have strengthened partnerships between growers, local authorities, health boards, and wholesalers, increasing the supply of Welsh, sustainable produce and improving food education and procurement. Support for 52 Welsh food businesses has helped retain 1,119 jobs.

As highlighted in our Evidence Paper, we are progressing the implementation of Part 3 of the Social Partnership and Public Procurement (Wales) Act 2023. This introduces new socially responsible procurement duties on contracting authorities to pursue economic, social, environmental, and cultural well-being when undertaking procurement. A consultation on the draft Statutory Guidance required to support implementation of the Act closed on 10 February 2026. The Statutory Guidance will help public bodies who are covered by the Act to discharge their new socially responsible procurement duties. It will provide practical guidance on achieving wellbeing outcomes through procurement. We will work with public bodies, social partners, procurement professionals, and others to support effective implementation and delivery.

Our Carbon Reduction Pilot directly supports Welsh Government procurement requirements by providing suppliers with a practical, procurement-ready approach to measuring and reporting carbon emissions in line with WPPN 06/21, including Scope 1, 2 and key Scope 3 emissions.

Through the pilot, businesses are supported to record emissions using a consistent, auditable methodology and to develop credible carbon reduction plans, strengthening readiness for major public sector contracts and delivery of Net Zero 2050.

By the end of the two-year pilot we aim to have supported nearly 140 food and drink manufacturing businesses, and from April 2026, this approach will be embedded within a new Sustainability Service offer for the sector, consolidating carbon reporting, the Sustainability Cluster, with supporting research and training.

Financial Implications – None



Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref: MA/HIDCC/0057/26

Andrew RT Davies, MS
Chair,
Economy, Trade, and Rural Affairs Committee
Senedd Cymru
SeneddEconomy@senedd.wales

27 February 2026

Dear Andrew,

The Sea Fisheries (Amendment) Regulations 2026

I refer to my letter to you of 22 January 2026. I wish to inform the Committee I have given my consent to the Secretary of State to make the Sea Fisheries (Amendment) Regulations 2026 (“the Regulations”). I have laid a Written Statement which can be found [here](#).

The Regulations intersect with devolved policy and apply to Wales (they also apply to England, Scotland and Northern Ireland). The Regulations are subject to the negative procedure and were laid before Parliament on 6 February 2026 with a commencement date of 27 February 2026.

Although the Welsh Government’s general principle is that statutory instruments relating to devolved matters should be made by the Welsh Ministers, on this occasion it was considered appropriate for the Regulations to be made by the Secretary of State for the reasons outlined in my letter of 22 January.

I have written similarly to the Chair of the Chair of the Legislation, Justice and Constitution Committee.

Yours sincerely

Huw Irranca-Davies AS/MS

Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros Newid Hinsawdd a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Huw Irranca-Davies AS/MS
Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros
Newid Hinsawdd a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate
Change and Rural Affairs

Our ref: HID PO 113 26

Mike Hedges MS
Chair
Legislation, Justice and Constitution Committee
Senedd Cymru

SeneddLJC@senedd.wales

2 March 2026

Dear Mike,

I am writing in accordance with the inter-institutional relations agreement to draw to your attention a [Written Ministerial Statement](#) summarising discussions at the most recent meeting of the Inter-Ministerial Standing Committee ('IMSC').

Further to my letter notifying you that the original meeting scheduled for 5 February had been postponed and that I would write again once a new date had been agreed, I was unable to provide further pre-notification as the revised meeting date was agreed at short notice.

This letter has been copied to the Chairs of the following Committees: Finance; Economy, Trade and Rural Affairs; Culture, Communications, Welsh Language, Sport, and International Relations; Health and Social Care; and Equality and Social Justice.

Yours sincerely,



Huw Irranca-Davies AS/MS
Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros Newid Hinsawdd
a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs

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We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio



Llywodraeth Cymru
Welsh Government

Andrew RT Davies MS
Chair of Economy, Trade, and Rural
Affairs Committee

SeneddEconomy@senedd.wales

3 March 2026

Dear Andrew

I am writing to inform you, in line with the inter-institutional relations agreement, that a meeting of the Inter-Ministerial Group for Trade is scheduled for 4 March 2026.

The meeting will cover an update of the trade policy programme and trade matters to do with the US, GCC and discussion around steel trade measures.

I will update you further following the meeting.

Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio

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Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio



Llywodraeth Cymru
Welsh Government

Mike Hedges MS
Legislation, Justice and Constitution Committee
Senedd Cymru

9 March 2026

Dear Mike,

In accordance with the inter-institutional relations agreement, I am writing to notify you that a Memorandum of Understanding (MoU) between the Welsh Government, the North Sea Transition Authority (NTSA) and the UK Government regarding issues relating to onshore petroleum licencing was published on 9 March 2026. It can be found [here](#).

By mutual agreement, the MoU has been published on the NTSA website and a link will be included on the [Welsh Government's petroleum licencing guidance web page](#), rather than hosting it on the dedicated Concordats, memorandums of understanding and other agreements Welsh Government webpage.

This MoU sets out the agreed working arrangements in relation to reserved matters connected to onshore petroleum licencing in Wales. While onshore oil and gas licencing is devolved, certain functions remain reserved to the UK Government, including the setting and waiving of licence rentals, invoicing and collection of rentals, and the power to revoke licences for non-payment. The MoU clarifies how the parties will work together on these matters, including the roles of the NSTA and HM Treasury, and the processes for information-sharing, consent and decision-making.

I have also copied this letter to the chairs of the following committees: Economy, Trade, and Rural Affairs; Climate Change, Environment, and Infrastructure; and Finance.

Yours sincerely,

Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

**Economy, Trade, and
Rural Affairs Committee**

Rebecca Evans MS
Cabinet Secretary for Economy, Energy and Planning

Jack Sargeant MS
Minister for Culture, Skills and Social Partnership

3 March 2026

Dear Rebecca and Jack,

Follow-up from the General Ministerial Scrutiny session held on 25 February 2026

Thank you for attending the Economy, Trade and Rural Affairs Committee meeting on 25 February. During the session, you offered to send the Committee follow-up information on several points.

For completeness, I have included these points below:

1. The latest position regarding identifying an investment partner for the north Wales AI Growth Zone;
2. The development of a defence cluster, and how this is expected to work;
3. The various workstreams implementing the recommendations of the floating offshore wind task and finish group;
4. The timeline for the decision to accelerate an audit of rest facilities for heavy goods vehicle drivers being undertaken by the Welsh Government as a priority action;
5. An update on negotiations around non-Jobcentre Plus funding;
6. The latest position on Gilestone Farm, including the Welsh Government's ambition for this investment now.

Alongside these points, during the session it was noted that there are two metrics for measuring apprenticeship starts. The Committee would like to receive clarification on the primary measure used by the Welsh Government during this Senedd term, and if this approach has been recently changed.

Given time constraints presented by the upcoming dissolution period, I would be grateful if you could respond to the above points by 12 March 2026.

Yours sincerely,

A handwritten signature in black ink that reads "Andrew RT Davies". The signature is written in a cursive style with some capital letters.

Andrew RT Davies MS

Chair: Economy, Trade and Rural Affairs Committee

We welcome correspondence in Welsh or English



Eich cyf/Your ref
Ein cyf/Our ref

Andrew RT Davies MS
Chair - Economy, Trade and Rural Affairs Committee

12 March 2026

Dear Andrew,

Thank you for your follow-up letter from the General Ministerial Scrutiny session held on 25 February 2026.

We are pleased to provide clarification on all the points you have requested, as follows.

The latest position regarding identifying an investment partner for the north Wales AI Growth Zone

The North Wales AI Growth Zone is a private sector-led bid, with Ynys Môn County Council and Bangor University - it is not led by the Welsh Government and Stena has not yet disclosed to us or the UK Government who the investor / developer is. We are, however, engaging with all partners to maximise the opportunities for both AI Growth Zones and this is maturing positively, including North Wales.

There was a session, for example, in Cardiff on 26 February involving a range of organisations, such as infrastructure providers, prime technology players, and academia to discuss the development of AI Growth Zones in Wales. This will be followed by a session in North Wales in the coming months. As the Committee will appreciate, investment decisions required for AI Growth Zones involve commercially sensitive discussions and it would not be appropriate to comment further at this stage.

The development of a defence cluster, and how this is expected to work

The Welsh Government has been working with the MOD to establish a security and defence cluster for Wales. Announced in the Defence Industrial Strategy, Wales will be one of several clusters already established in the UK.

I (Cabinet Secretary for Economy, Energy and Planning) was delighted to launch the Wales Regional Defence and Security Cluster, jointly with the Secretary of State for Wales, on 9 March.

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A steering group has been established, chaired by representatives from Airbus Defence & Space and Thales, and is comprised of representatives from SMEs, Wales-based sector organisations, universities, and further and higher education. The steering group will run the cluster with the MOD and the Welsh Government providing support as and when needed.

The aspiration is to have over 300 Welsh companies, colleges and universities in this cluster. The MOD is looking to the clusters to help invigorate the UK defence industrial base by facilitating industry, academia, and government to collaborate, share ideas and identify routes to market through exploitation and commercialisation.

The various workstreams implementing the recommendations of the floating offshore wind task and finish group

We are progressing actions from the Offshore Wind Task and Finish group covering the main themes within the Action Plan.

Market Making

Leveraging social value has been a major theme in our discussions with the Crown Estate and, for the first time, the Round 5 seabed leasing programme included social value as part of the bidding process. We are now in a position that all three developers have reached Agreement for Lease status and have an inherent responsibility to deliver social value for the Celtic Sea region. The Crown Estate has also established a Celtic Sea Forum, which not only includes the Round 5 developers but also the test and demonstration projects. This will enable a coherent and co-ordinated approach to delivery, which should maximise the potential for Wales.

This Celtic Sea delivery group will also be providing further detail in relation to what support is required for ports and supply chains in Wales. The Welsh Government is committed to working with the Crown Estate, as well as GB Energy and the National Wealth Fund, to ensure a co-ordinated approach to this support.

Enabling Environment

We have provided additional budget to Natural Resources Wales (NRW) to support its marine advisory service, which will unlock decision-making for marine licences. We are working with NRW and contributing to the Collaboration for Offshore Wind for Strategic Compensation process to identify suitable strategic compensation for Wales.

We have also had extensive engagement with UK and other Devolved Governments to progress appropriate environmental compensation measures. We have agreed with the UK Government that any offshore projects in Wales will have the option to access the new Marine Recovery Fund, should any compensatory measures be required for damage to a Marine Protected Area.

Alongside this, we are working collaboratively with the Crown Estate to leverage its marine mapping expertise and understand how the Marine Delivery Routemap can feed into the marine planning process. This work will include the development of a spatial assessment of Welsh seas that will inform marine planning.

Grid is another priority for us and we are contributing to NESO's Strategic Spatial Energy Plan (SSEP) process, providing advice on mapping approaches for the Welsh marine area and identifying opportunities to align marine planning with the SSEP. This work is ongoing in tandem with work on terrestrial infrastructure requirements.

Finance

We are working proactively with GB Energy, the National Wealth Fund and the Crown Estate to identify areas of mutual interest for investment, including supply chain development and infrastructure investment.

We are utilising partners such as Marine Energy Wales to promote funding opportunities to key stakeholders in Wales. This activity is supported via Business Wales newsletters and other social media activity.

Ports

A key action from the Offshore Wind Task and Finish group was the creation of a Welsh ports prospectus to showcase the investment opportunity of ports in Wales. This was launched at Future Energy Wales in October 2025 and was showcased at the Wales Investment Summit in December 2025. We continue to work with the ports to support their investment ambitions and are holding follow-on discussions regarding specific investment propositions.

We have also used the Welsh ports prospectus as a marketing tool in our discussions with the sector's wider supply chain to attract interest from a wide range of international investors. An example of this activity was a joint initiative with the Department of Business and Trade in Oslo where officials, alongside the UK government, Equinor, GB Energy and the Crown Estate, outlined the Celtic Sea opportunity to a wide range of supply chain companies operating in the offshore wind sector.

Supply Chain and Clusters

We are active members of the Offshore Energy Alliance and the Celtic Sea Cluster which promote business opportunities within the fixed and floating offshore wind industry.

We also actively promote trade and investment opportunities within the sector and take Wales-based businesses to relevant trade shows such as Global Offshore Wind and WindEurope. These events provide a cost-effective opportunity to companies to promote their activities to the wider offshore wind supply chain.

We are engaging with all offshore wind developers with an interest in Welsh waters, to promote the capability and expertise of Welsh companies and to identify areas of mutual interest.

The Action Plan identified foundations and sub-structures as a particular supply chain opportunity, which aligned with the 2024 Industrial Growth Plan for Offshore Wind. We have worked closely with Welsh ports to quantify the opportunity and to also reach out to potential international suppliers to promote Wales's capabilities. However, we recognise that the market pipeline needs to have greater visibility to attract this type of high value manufacturing opportunity to Wales.

In terms of Tier 1 contractors, we are actively engaged with a number of organisations to outline the Welsh proposition.

Skills

We welcome the Offshore Wind Task and Finish Group's emphasis on strengthening Wales's skills ecosystem, which aligns with the Green Skills Review and our broader goal of a more co-ordinated, agile and responsive skills offer. We are engaging with the renewable

energy industry, learning providers and regional skills partnerships to develop a clearer picture of the future supply and demand for skills in the sector.

A range of work is currently underway, our expanded Flexible Skills Programme continues to deliver tailored support to businesses to invest in themselves and build a stronger, more skilled workforce in response to the fluid needs of industry. This established programme is well placed to support companies to embrace new technologies including those around green growth and the energy transition, and Medr's consultation on the future apprenticeship programme, which is exploring opportunities for innovation in programme delivery and design to better meet the needs of learners, employers and the economy.

The timeline for the decision to accelerate an audit of rest facilities for heavy goods vehicle drivers being undertaken by the Welsh Government as a priority action

Surveying of rest stop facilities has already taken place. Data from that survey are currently being reviewed, with an executive summary due to be published after the election.

An update on negotiations around non-Jobcentre Plus funding

The Minister for Culture, Skills and Social Partnership met with the DWP Minister for Transformation, Andrew Western, on 10 March 2026 to further discuss this matter. We will be issuing a Written Statement shortly to set out how we will deliver the UK Government manifesto commitment to devolve employment support funding to the Welsh Government.

The latest position on Gilestone Farm, including the Welsh Government's ambition for this investment now.

A new tenancy agreement with the current tenant for Gilestone Farm has now been agreed, which ensures that agricultural activity at the site can continue in the short-term and that the site is managed appropriately.

Officials have held early-stage discussions with Powys County Council as set out by the Welsh Government's "Identification and Disposal of Welsh Government Non-Core Surplus Land and Buildings" guidance, but these have not proceeded to any formal negotiations or submissions of formal plans. Discussions around the medium to long-term future of the site are ongoing and the Welsh Government remains committed to ensuring the protection of the ospreys at the site in any future activities. The Welsh Government is also committed to engaging with the local community through the appropriate channels as this work progresses.

Metrics for measuring apprenticeship starts

During this Senedd term, the Welsh Government and then Medr have published two complementary sets of statistics on apprenticeship starts - total apprenticeship starts and quality starts. Both measures are relevant to the Programme for Government commitment and are published transparently in the data.

Ministers have placed greater emphasis in public statements on total apprenticeship starts, which provide a more timely indication of progress, particularly as the Senedd term draws to a close. This does not represent a change to the commitment but reflects the appropriate use of two published datasets for different purposes.

We hope this information is helpful.

Yours sincerely,

Rebecca Evans.

Rebecca Evans AS/MS

Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio

JACK SARGEANT

Jack Sargeant AS/MS

Minister for Culture, Skills and Social Partnership
Y Gweinidog Diwylliant, Sgiliau a Phartneriaeth Gymdeithasol



Ein cyf/Our ref: MA-MDFWL-0484-26

Andrew RT Davies MS
Chair
Economy, Trade and Rural Affairs Committee
Senedd Cymru
Cardiff Bay
Cardiff
CF99 1SN

6 March 2026

Dear Andrew

Development of Tourism and Regulation of Visitor Accommodation (Wales) Bill – Revised Explanatory Memorandum

I am writing to inform you that I have laid a copy of the revised Explanatory Memorandum to the Development of Tourism and Regulation of Visitor Accommodation (Wales) Bill, ahead of the Stage 3 proceedings on the Bill on 10 March.

A number of revisions have been made to the Explanatory Memorandum in response to Stage 1 Committee recommendations, and to reflect amendments made to the Bill at Stage 2. The main revisions are:

- changes to reflect the replacement at Stage 2 of the 'fire prevention standard' included in the Bill as introduced, with the 'fire safety standard' (paragraphs 3.51, 7.20, & 8.72-8.74);
- an explanation of the 'prevention of nuisance & annoyance' licensing condition added to the Bill at Stage 2 (paragraph 3.57, the 'Benefits' section at page 42, & paragraph 7.23);
- further detail as to which bodies might potentially be responsible for particular licensing authority functions (paragraphs 3.58, 7.6, & 7.17);
- the addition of a reference to the £0.43m of Welsh Government funding for WRA to support discovery work for the licensing system including interaction with the registration system being established under the VARL Act (paragraph 8.15); and
- the inclusion of outcomes from a sensitivity analysis conducted in relation to how the administrative cost of the scheme may vary according to the number of compliance cases which require physical inspection of a premises to be conducted

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

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(paragraphs 8.52-8.53).

The Explanatory Notes have also been updated to reflect amendments made to the Bill at Stage 2.

Officials have also taken the opportunity to rectify some inconsistencies identified between the Welsh and English versions of the EM laid at introduction. The EM laid at introduction has, of course, been superseded by the new version laid on 4 March.

I hope this information is useful, and I would once again like to thank you and the Committee for your considered scrutiny of the Bill.

I am copying this letter to the Chairs of the Legislation, Justice and Constitution Committee, and the Finance Committee, for information.

Yours sincerely,

A handwritten signature in black ink that reads "Mark Drakeford". The signature is written in a cursive style and is contained within a thin black rectangular border.

Mark Drakeford AS/MS

Ysgrifennydd y Cabinet dros Gyllid a'r Gymraeg
Cabinet Secretary for Finance and Welsh Language

Huw Irranca-Davies MS

Deputy First Minister and Cabinet Secretary for Climate Change
and Rural Affairs

Rebecca Evans MS

Cabinet Secretary for Economy, Energy and Planning

10 March 2026

Dear Huw and Rebecca,

**Follow-up from the General Ministerial Scrutiny session
held on 5 March 2026**

Thank you for attending the Economy, Trade and Rural Affairs Committee meeting on 5 March. During the session, follow-up information was requested and offered on several points, as listed below:

Trade and Borders

1. An outline of how Wales is represented in conversations with the UK Government and EU negotiators.
2. An update on meetings with the UK Government regarding fair payment on scrap metal.
3. Any update which can be shared on whether the UK Government has plans to align itself with the move by the EU to restrict the export of scrap to non-Organisation for Economic Co-operation and Development countries, who can't demonstrate that they can process scrap sustainably. I would appreciate this also including detail on how the Welsh Government plans to meet environmental targets whilst driving forward on the circular economy, as offered.

4. Information on how Wales can ensure that we maximise better quality scrap for the products we do not wish to be importing steel for.

Rural Affairs

1. An update on progress of the Welsh Government's 'Our Animal Welfare Plan for Wales 2021-26', particularly in relation to the linked PFG commitments.
2. An update on the operational agreements in relation to the fisheries.
3. Clarity around the rules for a non-AFU setting as contrasted with an approved finishing unit setting, in terms of post-movement TB testing on cattle - including the justification for, and effectiveness of, these rules.
4. Detail of the organisations who are members of the task and finish group responsible for carrying out the agricultural pollution regulations review.

Alongside these points, there were several questions exploring follow-up to the Committee's recent work into Hybu Cig Cymru (HCC) which we were unable to reach during the session, and I would therefore welcome receiving responses to the below also:

1. An update on the corporate culture at HCC, including how HCC has been reporting to the Welsh Government on this matter, and the systems in place to continue reporting into the next Senedd term.
2. Any detail on Welsh Government discussion with HCC as it developed its Vision 2030 document, particularly on governance and funding arrangements.
3. Information on when Vision 2030 is expected to be published.

Given time constraints presented by the upcoming dissolution period, I would be grateful if you could respond to the above points by 19 March 2026.

Yours sincerely,



Andrew RT Davies MS

Chair: Economy, Trade and Rural Affairs Committee

We welcome correspondence in Welsh or English



Agenda Item 2.7

Vikki Howells AS/MS
Y Gweinidog Addysg Bellach ac Uwch
Minister for Further and Higher Education



Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref: MA-VH-0185-26

Andrew RT Davies MS
Chair of Economy, Trade and Rural Affairs Committee

11 March 2026

Dear Andrew,

Further to the Written Ministerial Statement by the Minister for Further and Higher Education on 26 June 2025 and the Welsh Government's response to the Economy, Trade and Rural Affairs Committee report - Apprenticeship Pathways on 3 September 2025, we have today jointly issued the attached [Written Ministerial Statement](#) in relation to the publication of the [Strategic Direction for Vocational Education and Training in Wales](#).

Yours sincerely,

Vikki Howells AS/MS
Y Gweinidog Addysg Bellach ac Uwch
Minister for Further and Higher Education

Lynne Neagle AS/MS
Ysgrifennydd y Cabinet dros Addysg
Cabinet Secretary for Education

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Handwritten signature of Jack Sargeant in black ink, with a horizontal line underneath.

Jack Sargeant AS/MS

Y Gweinidog Diwylliant, Sgiliau a Phartneriaeth Gymdeithasol
Minister for Culture, Skills and Social Partnerships

Handwritten signature of Rebecca Evans in black ink.

Rebecca Evans AS/MS

Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio
Cabinet Secretary for Economy, Energy and Planning

Agenda Item 4

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