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Scotland's Maritime Sector

Strengths, Capabilities and Opportunities

A Maritime Nation

Scotland is a maritime nation. Its coastline runs 11,646 miles and its waters cover 178,500 square miles, nearly six times the country's land surface. From the Clyde through to the Cromarty Firth, Leith and Lerwick, the sea is more than just a backdrop: it is the platform that sustains a world-class industrial base and on which Scotland itself functions.

The scale of this base is well evidenced. According to the Scottish Government's official Marine Economic Statistics 2023 (published in December 2025), Scotland's maritime economy generated £5.6 billion in Gross Value Added (3% of the Scottish economy) and supported 75,900 jobs (3% of all Scottish employment). The industries at the heart of this briefing sit within that total: support services for oil and gas (£2.4 billion GVA), shipbuilding and repair (£540 million GVA and 7,700 jobs), and marine construction and services. Maritime UK's State of the Maritime Nation 2025, which counts the maritime industrial sectors on a UK-wide basis, attributes around 20% of the UK total to Scotland. It is worth noting that these official figures understate the full picture: offshore wind is not yet fully captured in the GVA totals, and oil and gas extraction itself is excluded, with only support activities counted.

Scotland's maritime sector is not a single entity, but an integrated ecosystem that builds the most advanced warships in Europe whilst engineering and operating the subsea infrastructure that powers the North Sea. It runs the ports through which renewable energy components, energy commodities and lifeline ferry services pass, and builds, repairs, refits, charters and tows the vessels on which those activities depend. And it does all that from a tight network of coastal communities, supported by the world's leading maritime education and research institutions.

This briefing maps each strand of this ecosystem: its strengths, the capabilities it has built, and the opportunities within its reach.

Shipping, Trade and Connectivity

Before any vessel is built or any field developed, shipping is what makes Scotland work as a trading nation. Around 95% of goods entering the UK arrive by sea, and shipping helps facilitate some £72 billion of Scottish trade each year – carrying Scotland's world-famous exports of Scotch whisky, Aberdeen Angus beef and Harris tweed to international markets, while keeping supermarket shelves stocked, power stations supplied and energy flowing. On average there are 15,000 passenger and cargo vessel calls at Scottish ports annually.

The economic footprint is substantial. The UK Chamber of Shipping estimates that shipping contributes around £900 million directly to the Scottish economy, rising to £2.2 billion in GVA once wider effects are included, and supports some 85,000 jobs across Scotland – with every direct job in shipping supporting a further ten in the wider economy. These are good jobs: shipping pays on

average around 20% more than the average full-time UK employee, and roles in the industry are around 90% more productive than the UK average.

For Scotland's island and remote coastal communities, ferries are not a convenience but a lifeline. More than 100,000 people across Scotland depend on ferry services to reach the mainland, and around 9.75 million passengers passed through a Scottish port to take a ferry in 2022. Lifeline networks serving the Clyde, Hebrides and Northern Isles connect communities to education, healthcare, employment and markets, and sustain the tourism on which many island economies depend – underlining why Scotland's domestic vessel pipeline is a matter of national resilience as well as industrial opportunity.

Naval Shipbuilding

Scotland is the heartland of UK naval shipbuilding. The two main yards – BAE Systems on the Clyde at Govan and Scotstoun, and Babcock at Rosyth – deliver between them the next generation of the Royal Navy's surface fleet, alongside a growing export pipeline.

Clyde: Type 26 City-Class Frigates and Submarine Basing

BAE Systems is building eight Type 26 anti-submarine warfare frigates at Glasgow under contracts worth around £7.9 billion. The first-of-class, HMS Glasgow, was named in May 2025 and is now in fitting-out at Scotstoun. The programme directly supports over 2,000 jobs at the Govan and Scotstoun yards and another 2,000 roles in the wider UK supply chain. BAE has invested more than £300 million in modernising the Clyde facilities, including the new Janet Harvey Shipbuilding Hall – a covered build environment that will accelerate throughput and improve quality.

The Type 26 has become a UK export success story. The design has been selected by Canada (15 ships, as the River-class destroyer), Australia (6 ships, as the Hunter-class frigate), and Norway (5 frigates). This is the largest UK warship export deal by value in history. BAE will build the Norwegian frigates concurrently with the remaining Royal Navy hulls on the Clyde, with deliveries expected to begin in 2029/30. Combined with Canadian and Australian orders, more than 30 Type 26 hulls are now under contract internationally – a volume that gives the Clyde a long-term industrial drumbeat.

The wider economic footprint is significant. Defence spending on frigates alone is estimated to support over 12,000 jobs in Scotland once supply chains are factored in. Ferguson Marine has already won fabrication work on Royal Navy Type 26 modules, demonstrating that the programme is spreading benefits down the Clyde and into the wider Scottish industrial base.

The Clyde is also home to the entire UK submarine fleet, with HMNB Clyde at Faslane scheduled to host all Royal Navy submarines from 2026 onwards. The Clyde Transformation Programme (Clyde 2070) represents a multi-decade infrastructure commitment with a footprint that ripples deep into the local economy.

Rosyth: Type 31 Inspiration-Class Frigates and Submarine Dismantling

At Rosyth, Babcock is constructing the Royal Navy's five Type 31 Inspiration-class general-purpose frigates under a £1.25 billion contract. The first-of-class, HMS Venturer, was rolled out of the Rosyth assembly hall in 2024 and floated up in 2025 – a milestone supported by Scottish supply chain partners. The Type 31 programme is positioned not only to deliver for the Royal Navy but to provide an export-ready platform; Babcock's Arrowhead 140 design has already been selected by Indonesia (2 ships) and Poland (3 ships under the Miecznik programme), with construction work programmes spanning multiple yards including Rosyth. The Submarine Dismantling Project, also anchored at Rosyth, brings a complementary long-term industrial workstream.

Navantia UK: Methil and Arnish

Scotland is also home to two of the four yards acquired by Navantia UK in January 2025 – Methil in Fife and Arnish on the Isle of Lewis. Both sites are receiving significant capital investment, including new equipment, upgraded crane infrastructure and dedicated training facilities. Methil is well positioned to support offshore wind fabrication and defence work, while Arnish is delivering subsea structures and offshore energy contracts and is strategically placed to benefit from ScotWind activity on Scotland's west coast. Navantia UK is also the lead constructor of the Royal Navy's three Fleet Solid Support Ships through its Belfast yard – a programme in which Scottish supply chain firms are well placed to participate.

Naval Test and Evaluation Infrastructure

Scotland hosts a concentration of nationally significant naval test and evaluation infrastructure: the British Underwater Test and Evaluation Centre (BUTEC) and the West Coast Ranges for underwater testing; the Robotarium and the National Manufacturing Institute Scotland (NMIS) for advanced manufacturing and autonomy; and a network of Catapult facilities supporting innovation across propulsion, materials and digital systems. Together, these assets underpin Scotland's role as the UK's leading naval shipbuilding cluster and as a credible host for future export-led programmes.

Civil Shipbuilding

Alongside its naval shipbuilding leadership, Scotland retains a meaningful and growing commercial vessel construction and marine fabrication base. The opportunity ahead is real – driven by domestic public vessel demand, offshore wind structural fabrication, and the broader transition to lower-carbon marine assets – but it depends on commercial certainty and a credible industrial pipeline.

Ferguson Marine

Ferguson Marine at Port Glasgow is the last commercial shipbuilder on the lower Clyde and the only builder of merchant ships still operating on the river. A nationalised executive non-departmental public body of the Scottish Government, the yard has an 11-acre water-front site with three main fabrication bays, pipe, joinery and hydraulic shops, and two quayside berths. Beyond its CalMac ferry programme, Ferguson Marine has demonstrated capability in fabricating structural modules for the Type 26 frigate programme – evidence of how a domestic civil yard can be a productive participant in defence supply chains.

In 2026, the Scottish Government announced its intention to make a proposed direct award of four vessels to Ferguson Marine – a Marine Protection Vessel, a Marine Research Vessel, and two CalMac ferries – subject to due diligence, subsidy control assessment and Competition and Markets Authority engagement. If progressed, this would represent a strategic step towards using Scotland's public vessel pipeline as a national industrial asset, providing the stable baseline of work that comparable shipbuilding nations routinely provide to their own yards.

Malin Group and the Scottish Marine Technology Park

Malin Group, headquartered in Glasgow with sites at Renfrew, Old Kilpatrick and Aberdeen, has built one of the largest marine fabrication facilities on the West Coast of Scotland. Its 200,000 square feet of covered production space at Westway Park, supported by 500-tonne and 100-tonne gantry cranes, has already been used to fabricate large offshore structures (i.e. six 200-tonne primary lifting structures for Hinkley Point C, bringing large jacketed fabrication back to the Clyde). The group's Malin Marine Consultants business unit is delivering FEED and feasibility work for floating wind and

decarbonisation projects, and Malin Abram provides specialist heavy-lift and load-out services – including support to Babcock's float-off of HMS Venturer.

The Scottish Marine Technology Park (SMTP) is being developed at the former Carless Oil Refinery site in Old Kilpatrick by Malin Group, with support from West Dunbartonshire Council, Clyde Mission funding and the Glasgow City Region Investment Zone. Designed as a centre of excellence for marine technology, engineering and complex marine manufacturing, the park is projected when fully operational to support around 800 full-time jobs and draw in more than £134 million of private-sector investment.

Boatbuilders, ship-repairers, fabricators and OEMs

Beyond the larger yards, Scotland is home to a diverse population of commercial boatbuilders, ship-repairers, equipment OEMs, naval architects and specialist fabricators including: Macduff Shipyards (Macduff and Buckie); McTay-style ship-repair and refit capabilities along the West Coast; and a substantial maritime-equipment supply chain in propulsion, deck machinery, electrical systems, hydraulics, navigation and communications. Specialist firms such as Smart Green Shipping, Caley Ocean Systems, and John Tracey Specialist Welding all contribute to a distinctive Scottish capability in niche, high-value marine manufacturing.

The case for a Scottish commercial-build strategy

Scotland's commercial shipbuilding and fabrication sector competes in a global market that is itself shaped by extensive state support – from Italy's Fincantieri and France's Chantiers de l'Atlantique, through to Norway's Eksfin Domestic Ship Guarantee Scheme and South Korea's refund-guarantee system. Where comparable nations use public vessel pipelines, finance instruments and export-credit support to maintain their domestic yards, the Scottish opportunity is to combine an honest assessment of those market realities with a disciplined, commercially credible programme of investment in Ferguson Marine, Malin Group, SMTP and the wider Scottish commercial supply chain.

Subsea

Aberdeen and the North East of Scotland constitute one of the most concentrated subsea engineering ecosystems anywhere in the world. Built over more than fifty years on the back of North Sea oil and gas, the subsea cluster has produced world-leading capability in subsea engineering design, project management, fabrication, installation, inspection, repair and maintenance, survey, intervention, and remotely operated vehicle operations – alongside a deep base of supplier firms in connectors, valves, controls, sensors, hydraulics, and umbilical and cable manufacturing.

The Aberdeen City Region has the highest density of private-sector employment in Scotland, with over 22,000 private-sector businesses, and consistently ranks among the highest UK regions for GVA per capita and average earnings. The Scottish Government's 2023 marine economic statistics confirm support services for oil and gas as the single biggest contributor to the marine economy by GVA – some £2.4 billion, around 43% of the marine economy total – underpinned by around 14,600 high-value jobs. While the headline figures will shift as the energy mix changes, the engineering, project-management and operations expertise embedded in the region is durable, and increasingly being applied to new sectors.

That transition is already visible. The same subsea engineering and project management capability is now being deployed across offshore wind, subsea cables and inter-array systems, carbon capture and storage, aquaculture infrastructure, subsea defence and security, and subsea mining and

telecoms. The Global Underwater Hub, headquartered in Scotland, plays a central role in convening this cluster across offshore energy, aquaculture, defence, telecoms and subsea minerals.

Two long-term realities make this transition strategically important for Scotland. First, the subsea skills base (specialist welders, ROV pilots, hydrographic surveyors, subsea engineers, project controls professionals) is one of the most economically valuable concentrations of expertise in the UK, and its retention through the energy transition is essential to capturing the value of the next wave of seabed economic activity. Second, the same cluster that built and preserved North Sea hydrocarbon infrastructure is exactly the one needed to build, maintain and repower Scotland's 40 GW-plus future fleet of fixed and floating offshore wind installations, alongside emerging digital ocean infrastructure such as subsea data centres and inter-continental cables.

Renewables

Scotland's offshore wind ambition is now the largest in Europe. The ScotWind leasing round has allocated roughly 27–30 GW of project capacity across 19 sites, including approximately 19.2 GW of floating wind, establishing Scotland as the world's leading market for commercial floating offshore wind. The INTOG leasing round adds a further 5.4 GW across 13 sites focused on electrifying oil and gas infrastructure. In January 2026, the Scottish Government raised its overall offshore wind ambition to up to 40 GW of new capacity by 2040, quadrupling earlier 2030 targets. Major projects (e.g. Berwick Bank, Inch Cape, the Pentland floating cluster) are now consented, under construction, or in final development.

This represents one of the most significant concentrations of maritime industrial opportunity in a generation, and an enormous share of it sits on the maritime supply side: vessel chartering, towage, marshalling and assembly, port handling, operations and maintenance, survey and inspection, cable lay and protection, and the full lifecycle of installation vessels.

Because Scotland is establishing itself as the lead market for commercial floating wind, the capabilities developed here – in marshalling, integration, mooring and anchor installation, dynamic cabling, and floating wind O&M – are inherently exportable. Markets including Japan, South Korea, France, Spain, Portugal and Ireland will face the same engineering challenges Scotland is solving now. The vessel operators, towage providers and offshore service companies that build experience on ScotWind projects will be uniquely positioned to compete internationally.

Recognising this, Scottish Enterprise has already supported the supply-chain side through programmes such as the Scotland CAN DO Offshore Wind Innovation Feasibility Fund, which has backed work by Malin Marine Consultants on additive-manufactured drag anchors aimed at supporting domestic anchor production for floating wind.

Ports

Ports are not merely commercial logistics nodes, but industrial platforms on which Scotland's maritime economy depends. They host shipbuilding and ship-repair facilities; they marshal, assemble and integrate offshore wind components; they service the vessels that operate Scotland's ferry network and energy infrastructure; and they are the gateways through which Scotland's seaborne trade flows.

Among the most strategically significant Scottish ports for maritime industry are:

- **Aberdeen**: the energy capital of Europe, expanded by the South Harbour development at Nigg Bay; one of the UK's busiest ports, with around 6,500 vessel movements per annum and a long-standing role servicing North Sea operations now pivoting to offshore wind.

- **Port of Cromarty Firth (Invergordon)**: the Scottish port with the longest track record in offshore wind project delivery, anchoring the Inverness & Cromarty Firth Green Freeport.
- **Port of Nigg (Global Energy Group)**: a multi-sector, deep-water facility with major assembly halls and laydown areas; a magnet for inward investment, including Sumitomo Electric's recently announced HVDC cable manufacturing plant on the adjacent site.
- **Ardersier Port**: the UK's largest brownfield port at 450 acres, owned by Haventus, positioned to lead in offshore wind manufacturing, assembly and integration.
- **Forth Ports**: a coordinated portfolio across the Firth of Forth (Leith, Grangemouth, Rosyth, Burntisland, Methil and others), at the heart of the Forth Green Freeport. The Port of Leith renewable energy hub and the Port of Methil are being developed as nationally significant facilities for offshore wind and decommissioning.
- **Lerwick (Shetland)**: a major service base for offshore energy, the lead candidate for the UK's Ultra Deep Water Decommissioning facility, and increasingly positioned for ScotWind and Northern North Sea electrification work.
- **Stornoway**: supported by recent Scottish Government / Highlands and Islands Enterprise investment to develop the Deep Water South terminal for floating offshore wind.
- **Peterhead**: Europe's largest white fish port and a significant hub for energy, ferry and decommissioning activity.
- **Peel Ports' Clydeport**: including Greenock Ocean Terminal and Hunterston, with established ship-repair, container, dry-bulk and offshore-renewables roles on the West Coast.

Green Freeports

Scotland's two Green Freeports – Inverness & Cromarty Firth and the Forth – designated jointly by the Scottish and UK Governments in January 2023, represent a structural commitment to using port-led investment to drive industrial transition.

- **Inverness & Cromarty Firth Green Freeport** (ICFGF) aims to attract nearly £6.5 billion in investment and to create 18,300 UK jobs (11,300 of them in the Highlands), focused on floating offshore wind manufacturing, integration and O&M, alongside green hydrogen. Its tax sites span roughly 520 hectares across the Port of Cromarty Firth, Nigg, Deephaven, Ardersier and Inverness.
- **Forth Green Freeport** (FGF) aspires to attract up to £7.9 billion in investment by 2034 and to support around 34,500 UK jobs across sites at Grangemouth, Rosyth, Leith, Burntisland and Edinburgh Airport. Its sector focus spans renewables, advanced manufacturing, alternative fuels, carbon capture, shipbuilding, logistics and the creative industries.

Vessel service and support

Beyond their cargo and project-handling roles, Scottish ports host a substantial cluster of vessel service activity – dry-docking, ship-repair, refit, conversion, marine-engineering services, classification surveys, chandlery, bunkering, crew transfer and pilotage. As the global fleet decarbonises and as Scotland's domestic vessel demand (lifeline ferries, marine protection vessels, offshore wind support vessels) grows, the services side of the port economy is itself a significant industrial opportunity – particularly for alternative-fuel bunkering (methanol, ammonia, hydrogen) and shore-power infrastructure.

Skills, Research and Innovation

Skills and education

Scotland's maritime education and skills base is outstanding. The Naval Architecture, Ocean and Marine Engineering Department of the University of Strathclyde ranks ninth in the world. The City of Glasgow College houses the UK's largest and most modern Nautical College. Heriot-Watt University in Edinburgh leads on subsea technology and offshore engineering research. The University of Aberdeen has a long-standing reputation in offshore energy. Apprenticeship programmes at BAE, Babcock, Ferguson Marine and across the supplier base are well-established, and the Shipbuilding Skills Delivery Group – chaired by the Chief Executive of Scottish Engineering – is working to secure the long-term talent pipeline. The Scottish Government's 2025 Offshore Wind Skills Priorities and Action Plan provides a tripartite (government – industry – trade union) framework for closing emerging gaps.

Skills shortages are nonetheless being felt acutely – in embedded software and autonomy systems engineering, maritime cyber security, high-voltage battery and alternative-fuel technicians, hydrographic survey and payload integration, and remote-operations-centre supervision. Scotland's response – cluster-based "learning factories" linking colleges, universities, test ranges and industry – is internationally competitive where supported but needs sustained funding to scale.

Research, innovation and test facilities

Scotland is host to a constellation of nationally and internationally significant maritime research and innovation assets:

- **The European Marine Energy Centre** (EMEC) in Orkney – the world's leading test centre for wave and tidal energy converters.
- **The National Manufacturing Institute Scotland** (NMIS) in Renfrewshire – driving advanced manufacturing innovation across maritime applications.
- **The National Robotarium** (Edinburgh/Heriot-Watt) – the UK's leading hub for robotics, autonomous systems and AI research, with direct maritime applications.
- **The MarRI-UK Maritime Research and Innovation network**, with strong Scottish anchor institutions.
- **West Coast and BUTEC ranges** for naval test and evaluation.
- **Catapult facilities** (Offshore Renewable Energy, High Value Manufacturing, Connected Places, Digital, Compound Semiconductor Applications) with significant Scottish footprints.

Opportunities Ahead

The global ocean economy is estimated at around US$2.2 trillion. UNCTAD projects global maritime trade to grow at an average annual rate of 2.4% between 2025 and 2029. The global offshore wind market is forecast to require investments measured in the trillions of dollars by 2050. The energy transition, the decarbonisation of shipping, the build-out of subsea digital infrastructure, the renewal of national defence fleets, and the emergence of autonomous and uncrewed marine systems together represent the largest sustained wave of maritime industrial demand in a generation.

Scotland is positioned to capture a disproportionate share of this opportunity – but only with the right investment. The key strategic priorities are:

- **Demand certainty**: long-term, transparent public vessel and offshore wind pipelines that allow firms to plan, hire, train and invest.

- **Industrial intervention**: lawful, proportionate and commercially disciplined support for Scottish yards and ports, matched to the realities of international competition.
- **Skills and talent**: scaled investment in apprenticeships, mid-career conversion, HTQs and stackable micro-credentials in autonomy, alternative fuels, high-voltage systems and digital engineering.
- **Port and freeport investment**: completing the upgrade of Scotland's strategic ports for floating wind, decommissioning, and alternative-fuel bunkering.
- **Innovation**: continued investment in EMEC, NMIS, the National Robotarium, Catapult centres and the cluster-based learning factory model.
- **Exports**: a coordinated maritime export-promotion offer that translates Scottish industrial capability into international sales – in defence platforms, floating wind services, subsea technology, and decarbonisation solutions.

Critically, Scotland's maritime advantage comes from clusters rather than isolated firms, and the opportunity is increasingly place-based: a defence and advanced-manufacturing cluster on the Clyde in the west; a shipbuilding, assembly and innovation cluster around Rosyth and the Forth in the east, including the Arrol Gibb Innovation Campus; and an offshore energy and subsea cluster in the north-east centred on Aberdeen and the Cromarty Firth. Coordinating these clusters – linking industry, ports, skills providers, universities and innovation centres, and connecting them to the work of the Scottish Maritime Cluster, the Clyde Mission and Glasgow City Region – is what converts individual investments into system-level impact.

This direction of travel is consistent with the wider evidence base. The UK Government is currently developing a Maritime Growth Strategy to succeed the Maritime 2050 framework, signalling that the sector is at a strategic inflection point; RAND's analysis of the Clyde finds that skills, not demand, is now the binding constraint on growth; and the Clyde Mission has set out defence shipbuilding, low-carbon ship repair, smart ports and offshore services as priority opportunities requiring coordinated, place-based support. Taken together, they point to the same conclusion: Scotland should use defence demand, the net zero transition, skills and clusters to secure long-term industrial advantage in a highly competitive global sector.

These are the foundations on which a confident, credible Scottish maritime industrial strategy can be built – and on which Scotland can confirm its status as one of the most significant maritime industrial economies in Europe.