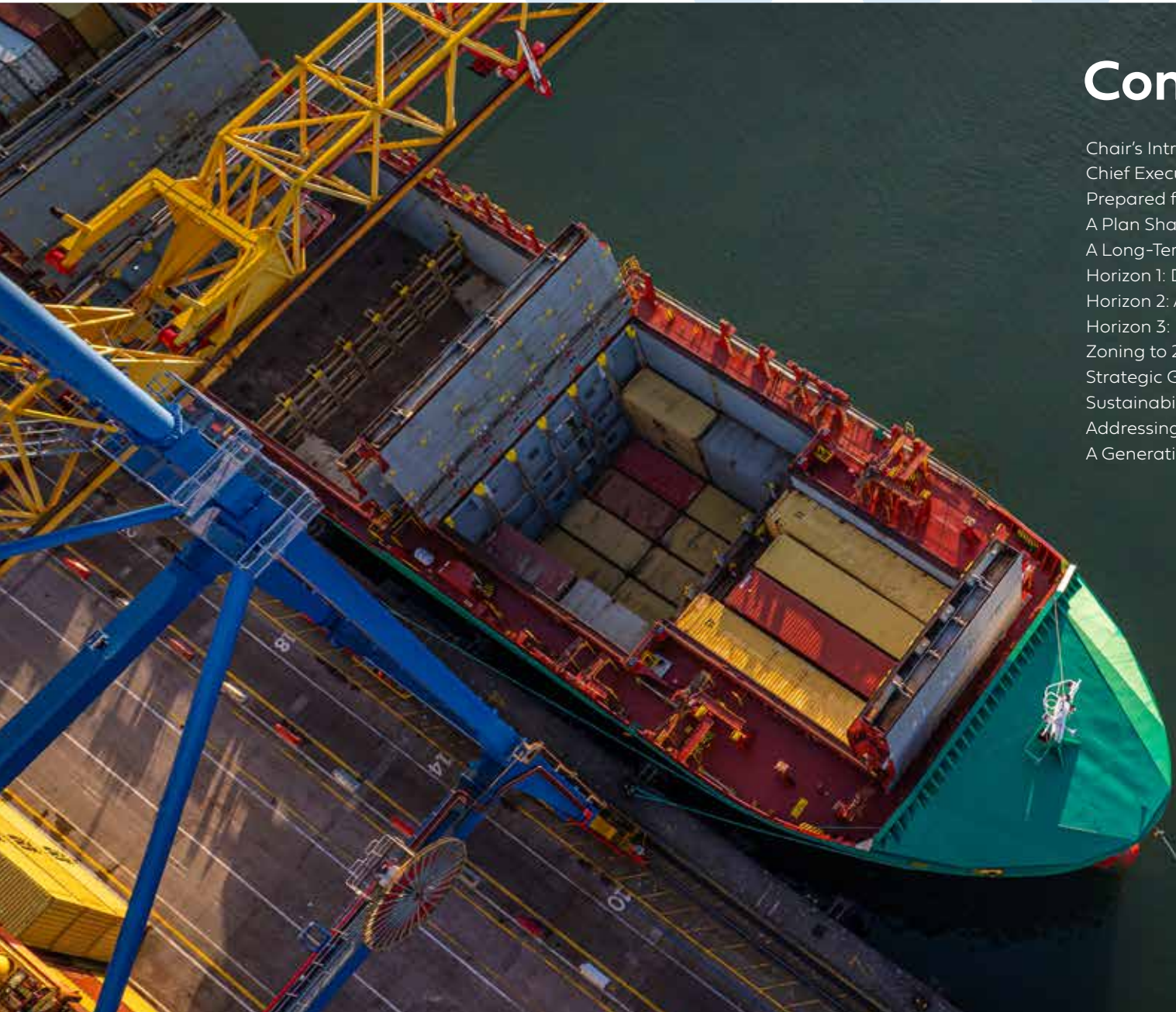




**Belfast
Harbour**
Masterplan
2025-50

Horizons of
Opportunity





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Chair's Introduction



Our Long-Term Vision Growth with Purpose



Belfast Harbour has served the regional economy for nearly two centuries as a trust port – an independent body that reinvests all its surpluses in the port and its infrastructure. In that time, we have adapted, invested and grown. Our role has expanded as trade has evolved and the city around us has changed.

Today, we handle around 70% of Northern Ireland's seaborne trade and a quarter of all seaborne trade across the island of Ireland. We provide a base for more than 760 businesses and 20,000 jobs. Our port is not a feature of NI's economy. It is a cornerstone of the economy.

This Masterplan sets out a 25-year framework for our continued growth. It is not a planning application – it is a guide to how we will develop the port and estate to 2050, with each project progressing, as necessary, through its own statutory planning process.

Throughout the period covered by this Masterplan, port trade comes first. Everything else we do is built around a working port that is one of the leading maritime gateways in the UK and Ireland. That is why we're planning to invest £1.3 billion to fund critical port projects.

Our achievements have been built on a pioneering spirit. In 1996, we welcomed our first cruise vessel to Belfast – a bold step, taken with the conviction that the city was ready to open to the world. Thirty years on, cruise tourism generates more than £25 million for the local economy each year. Belfast Harbour is now the second busiest cruise port in the UK and the busiest on the island of Ireland.

This Masterplan is grounded in the same approach: evidence-based, long-term, and focused on what Belfast Harbour can do for the region over the next 25 years. While the port remains our primary focus, this Masterplan also identifies housing and regeneration opportunities requiring additional investment of between £500 million and £750 million. We are actively exploring the delivery models and commercial partnerships needed to bring these projects forward. They will help ensure Belfast Harbour remains a place as well as a port.

The Strategic Gateway of the Dublin Belfast Economic Corridor

As capacity tightens at other ports, Belfast Harbour is putting the scale of our estate to work – supporting trade growth that benefits customers and the wider economy. Our partnership with ferry operator Stena Line underpins that role. In 2025, RoRo freight traffic through the port reached a record 625,000 units, with 1.73 million ferry passengers travelling through Belfast Harbour in the same year.

That is part of what drives our ambition to become the principal maritime gateway on the Dublin Belfast Economic Corridor (DBEC) – the island's most critical economic zone. As one of the primary trade and connectivity links with Great Britain, Belfast Harbour is central to its success.





Our 2,000 acres of land and 1,000 acres of water give us a footprint unmatched by any port in the UK or Ireland. That scale allows us to integrate all our activities – global trade, logistics, clean energy and creating new communities – in a single, connected environment.

Our growth is the region's growth. Every investment in deepwater capacity, logistics infrastructure and clean energy strengthens the supply chains that NI's businesses depend on. Every regeneration project extends opportunity along the waterfront and into the communities around us.

As a Trust Port, Belfast Harbour invests all post-tax profits into the port, its infrastructure, and the communities we serve – accountable not to shareholders, but to the region. We grow because the economy and society we serve require us to. That is what the Trust Port model demands – and what this Masterplan delivers.

Delivery Depends on Partnership

We recognise that delivering this Masterplan depends on factors beyond the Belfast Harbour Estate. External transport connections, electricity grid reinforcement, wastewater provision and wider planning policy are not within our direct control. These require coordinated action across government, regulators and infrastructure providers. We are committed to working with all relevant partners to ensure these dependencies are delivered in step with our own investment.

Realising the real estate opportunities in this Masterplan will require new delivery approaches and commercial partnerships. For port projects, the priority remains the reclassification of Belfast Harbour's accounting status – so that we can borrow prudently to fund the investment this needs.

The NI Executive is supportive of this change and legislation is being prepared to enable the Office for National Statistics to reclassify all NI Trust Ports. We have been encouraged by the strength of support for reclassification from our customers, partners and stakeholders, and we are grateful for it.

Without reclassification, we can still deliver – but we will face harder choices about pace and scope. With reclassification, we can go further – investing to prepare for the scale the economy demands and that our customers and stakeholders deserve.

Our Values in Practice

Belfast Harbour's values are People-Focused, Open, Responsible and Trustworthy. They are not a statement of intent. They are a description of how we work. They are visible in the way this Masterplan has been developed, in its honesty about constraints, and in its openness to scrutiny. They are also visible in our wider role: in our community investment programme, in our environmental commitments, and in our record of delivering major projects that have strengthened the city as well as the port.

The proposed Maritime Skills Academy will help ensure that the jobs this plan creates are accessible to people across Belfast and beyond – connecting infrastructure investment to workforce development and inclusive growth. Independent analysis confirms that the up to £1.3 billion investment set out in this Masterplan will generate measurable economic benefit for NI.

A Masterplan of this scale and ambition reflects the collective vision of the Belfast Harbour Commissioners' Board. I am grateful to my colleagues for their commitment to that vision and to the long-term future of this port. We publish this Masterplan with a clear sense of what Belfast Harbour can achieve, and of our responsibility to do so well. It is not a fixed blueprint. It will adapt as trade, technology and policy evolve. It is an ambitious vision. It is also a realistic one.

Dr Theresa Donaldson

Chair of Belfast Harbour Commissioners





Chief Executive's Introduction



Delivering What the Future Demands



Belfast Harbour is NI's principal port and a critical link to GB, Ireland and global markets. We are a working port, logistics hub, property developer, film studio operator and offshore wind enabler. We are landlord to more than 760 businesses across the maritime sector, manufacturing, services and technology, and home to Belfast Harbour Police, the oldest continuously operating law enforcement agency on the island of Ireland. Few organisations in the UK or Ireland match the range of what Belfast Harbour does.

Much of what people and businesses across the region depend on passes through here: from food and fuel to construction materials and consumer goods. At the same time, we ensure NI's exporters can reach their customers efficiently and competitively. Port trade is now and will remain our primary purpose. This Masterplan is designed above all else to sustain and increase that role.

Research by the Ulster University Economic Policy Centre confirms the scale of the port's contribution. We facilitate around £26.7 billion worth of trade each year and support £8.8 billion in Gross Value Added, equivalent to 15.7% of NI's total annual economic output. That activity supports approximately 155,000 jobs across the wider economy – nearly 17% of the region's jobs. More than 20,000 people are employed by businesses in Belfast Harbour Estate.

A Track Record of Delivery

Our ambition is grounded in a proven record. Over the past 25 years we have invested more than £692 million in capital projects, with a further £313 million already committed to 2029.

We have invested nearly £45 million in modernising and expanding our container terminal at Victoria Terminal 3 (VT3). We built the £53 million Offshore Wind Terminal at our D1 facility, enabling offshore wind farms that now generate 1.3GW of clean energy, enough to power more than a million homes. Wind farm assembly and marshalling will return to the site from 2029.

The £130 million invested to date in City Quays has created Grade A office space on a scale not previously seen in Belfast, alongside City Quays Gardens, a new public realm space at the heart of this development.

This Masterplan phases investment across three horizons: near-term delivery to 2029, scaled expansion through the 2030s, and long-term transformation to 2050. Horizon 1 of this Masterplan is already in delivery.

Construction is underway at our D3 site. This £90 million dual-purpose deepwater quay will, in the long-term, add further port capacity. When complete, it will accommodate larger cruise ships and allow for the assembly of next-generation offshore wind.

Procurement is under way for City Quays 4, which will deliver 325 new homes including affordable housing. Planning is advancing for Clarendon Wharf, with proposals for up to 600 new homes and mixed-use space extending regeneration near the waterfront.

Delivering projects of this scale means finding the right commercial partners, and for Horizon 2 we are exploring partnerships to bring forward further housing and regeneration at pace. City Quays Gardens is open, delivering high-quality public realm that connects the waterfront to the heart of the city.





We continue to support Titanic Quarter Limited in the ongoing development of Titanic Quarter, and to work alongside Navantia as it grows its operations at Belfast Harbour. Before Horizon 2 begins, we will also aim to establish the Maritime Skills Academy – ensuring that the talent pipeline is in place to support the growth this Masterplan will generate.

The Case for Planning Now

Beginning in April 2024, we undertook a rigorous 24-month process to shape this document. We commissioned independent experts in maritime trade and property to inform our thinking, while conducting more than 50 stakeholder briefings, four city-wide events and a formal public consultation.

Our process was driven by evidence. External forecasts prepared by port master planning experts Haskoning indicate that trade volumes through Belfast Harbour could grow from around 24 million tonnes today to over 30 million tonnes under steady growth by 2050. Under higher-growth scenarios, volumes could reach 40 to 50 million tonnes.

Under every scenario except decline or stagnation, growth will outpace current infrastructure before mid-century without planned investment. Under faster growth, we reach capacity up to a decade earlier. Published projections and our independent analysis indicate that other ports on the east coast will face their own capacity constraints even sooner. Separate analysis by Deloitte also points to significant future demand for port-centric commercial space and housing across the city.

Belfast Harbour has always provided the capacity essential trade needs to flow. This Masterplan is built on that foundation. By planning, we can invest efficiently, support the growth of businesses in the city and across the region, and avoid the cost and disruption of reactive catch-up. The decisions we take now will shape what Belfast Harbour can deliver for the next 25 years.

Built on Genuine Engagement

This Masterplan is the product of sustained and genuine engagement. We sought the views of statutory bodies, city-region partners and independent experts. The public consultation on our Draft Masterplan ran for eight weeks from November 2025. Almost 50 organisations and individuals provided formal responses.



These responses came from across the full range of stakeholders with a direct interest in Belfast Harbour's future – from government and industry to community representatives and environmental bodies. Ninety-five per cent expressed strong support for the strategic direction and long-term vision. That level of agreement gives us confidence that this Masterplan reflects a genuinely shared ambition for Belfast Harbour and the region we serve.

The remaining respondents did not oppose the strategic direction. Their submissions focused on implementation – on sequencing, technical detail and delivery. That feedback has directly shaped the priorities set out in this document. We are grateful to every organisation and individual who contributed across the two years it took to shape this plan. Your engagement has made our plans stronger.

What the Next Two Horizons Require

Horizons 2 and 3 require more – the scale and pace of investment required in these horizons cannot be achieved within our current borrowing constraints. As an NI Trust Port, we are classified as a public corporation for accounting purposes. Any commercial borrowing counts against the Department for Infrastructure's budget. This limits what we can deliver and when: not absolutely, but in terms of pace and scope.

A Plan We Can Deliver

Belfast Harbour has always planned proactively: to changes in trade, in technology, and in the needs of the city around us. This Masterplan continues that approach. It is honest about what depends on others, including government and utilities providers. It is structured to remain flexible. Projects can be deferred, sequenced or accelerated in response to demand, funding and policy.

Our goals are clear: sustain and grow the port; enable clean energy; support a thriving city and region; and power a flourishing economic corridor. This Masterplan sets out how our dedicated and expert team will deliver them.

Joe O'Neill

Chief Executive, Belfast Harbour

How Belfast Harbour helps Northern Ireland thrive

Scale & Reach



70%

of NI's seaborne trade and a quarter of all island-wide seaborne trade

£26.7 BILLION

worth of goods move through Belfast Harbour each year

2,000

acres of land and 1,000 acres of water – room to power regional growth

Economic Impact



£8.8 BILLION

in Gross Value Added (GVA) created by trade we facilitate

15.7%

of NI's total annual output enabled by this trade

£692 MILLION

invested in the past twenty-five years, with £313 million planned to 2029

Jobs & Opportunity



155,000

jobs supported across the region

20,000+

people employed throughout Belfast Harbour Estate

7,000

visitors daily to attractions like Titanic Belfast & the O2 Arena

Regeneration & Investment



Titanic Quarter

partnered to deliver this ongoing and iconic waterfront regeneration

900+

new homes planned at City Quays 4 and Clarendon Wharf

City Quays Gardens

opened in 2025 - NI's first park designed to *One Planet Living* standards

Sustainability & Innovation



71%

reduction in carbon emissions since 2015 – on track for net zero operations before 2030

Zero

operational waste to landfill – 30% recycled, 70% recovered for energy

100%

Marine Gas Oil replaced with renewable HVO fuel

Community & Inclusion



£3.5 MILLION

in support to communities over the decade

£500k+

Community Awards fund has supported 130+ local groups since 2021

£335k

invested in 2025 to support communities, skills, employability, and the environment

Prepared for Change Designed for Growth



This Masterplan sets out how Belfast Harbour will develop the port and estate to 2050. It aligns land, water, infrastructure and investment behind a single long-term vision. It ensures that decisions taken today support regional prosperity for decades to come.

This is a non-statutory framework. It is not a planning application, and it does not replace statutory processes. Individual projects will progress through established planning and consenting processes, as necessary.

A 25-year horizon is necessary because the infrastructure we build today will serve the region for generations. The decisions we make now will still be felt in the year 2100. Independent forecasting confirms that under most scenarios, existing infrastructure will come under increasing pressure before mid-century. That analysis is reinforced by the UK Department for Transport's own assessment of future port demand.

The context is clear. Global trade is evolving. Supply chains are being reshaped. Despite present global uncertainty, the transition to low-carbon energy is continuing. For businesses and communities across NI, East-West connectivity through Belfast Harbour is not a regional convenience – it is an economic necessity.

This Masterplan protects port primacy. It safeguards land and infrastructure for trade and logistics. It provides a shared framework for collaboration with government, regulators, customers and communities. It also sets a disciplined course for investment, sequenced across three horizons, that is grounded in evidence and built for delivery.



A Plan Shaped by Many

The Belfast Harbour Masterplan has been shaped through extensive engagement with customers, communities, tenants, residents, government, regulators and partners.

Alliance Party
Ards and North Down Borough Council
Arklow Shipping
Belfast Chamber
Belfast City Airport
Belfast City Council
Belfast Harbour Users' Group
Belfast Metropolitan College
BG Freight Line
British Ports Association
Calor Gas
Catalyst
CBI
CEF
Centre for Competitiveness
Cruise Britain
Conexpo
DAERA
DFC
DFE
DfI
DfI Roads
Dublin Belfast Economic Corridor (DBEC)
DUP
Harland and Wolff
Invest NI
IoD NI
Irish Continental Group
LCC Group
Manufacturing NI
Maritime Belfast Trust
MJM Marine
Mutual Energy
Natural Heat NI

Navantia
NI Chamber
NI Housing Executive
NI Water
NIE Networks
NIFHA
NIMO
Northern Ireland Affairs Committee
NIEA
NIO
Queen's University Belfast
Renewable NI
Retail NI
RNIB
RSPB NI
Sailortown Regeneration Group
SDLP
Simon Community
Sinn Fein
SONI
Spirit AeroSystems
Strategic Investment Board
Scruttons
Stena Line
Titanic Quarter Ltd.
Tourism NI
Translink
UK Major Ports Group
Ulster University
UUP
Valero
Visit Belfast
W&R Barnett
Wind Energy Ireland



A Mandate for Delivery

The engagement process yielded highly consistent feedback. Ninety-five per cent of respondents endorsed the strategic direction and long-term vision. The remaining five per cent sought operational clarification rather than challenging the vision. The plan received support from all main political parties and from Belfast City Council.

In total, 46 organisations and individuals provided formal responses. A summary report of the findings is available at: belfast-harbour.co.uk/consultation Feedback was structured around three clear priorities, with several critical enablers identified alongside them.



“The 2025-2050 Masterplan captures a bold and exciting future for Belfast Harbour. I fully support this vision, which promises to significantly increase Belfast Harbour’s contribution to our economy and regional connectivity.”

Liz Kimmins MLA
Infrastructure Minister

Stakeholder Priority 1 Port Operational Resilience and Capacity

Port users stressed the importance of resilience and capacity: berth depth, quay length, terminal efficiency and safeguarding land for core port activity as vessel sizes and volumes grow. Stakeholders confirmed the D3 deepwater berth / cruise terminal and the rebuild of Stormont Wharf as the most immediate infrastructure priorities – D3 in Horizon 1, Stormont Wharf in Horizon 2.

→ *Horizon 1 includes a fourth linkspan to strengthen the resilience of our unit load business. This reflects our continuing commitment to support Stena Line’s vital role as ferry operator and mirrors our significant recent investment in modernising our container terminal. The Masterplan reinforces port primacy throughout. It safeguards port and logistics space and deepens our long-term commitment to deepwater capacity and operational efficiency and resilience.*

Stakeholder Priority 2 Net Zero and the Clean Energy Transition

Stakeholders supported net zero ambition, offshore wind and shore power, viewing environmental leadership as essential to long-term competitiveness. They also emphasised the need for measures to remain affordable and operationally viable.

→ *The Masterplan clarifies infrastructure requirements, sequencing and commercial considerations across all three horizons. Our net zero and clean energy ambition remain high, but our delivery will be grounded in evidence, policy and affordability.*

Stakeholder Priority 3 Estate, Placemaking and Regeneration

Stakeholders supported mixed-use regeneration at inner harbour locations and improved waterfront access, with particular emphasis on affordable housing, inclusive public realm and safety.

→ *The Masterplan reinforces our ambition for accessible green space and the integration of new homes, workspaces, retail, leisure and tourism facilities across the estate. Realising these from Horizon 2 onwards will require new approaches to delivery.*

Critical Enablers

Technical respondents and business leaders identified several key enablers as essential to delivery: transport access, electricity grid reinforcement, wastewater provision and strategic road access. These were repeatedly raised as constraints that must be resolved in step with growth.

Reclassification of Northern Ireland's Trust Ports was identified as the single most critical administrative priority in Horizon 1. Organisations including NI Chamber and the UK Major Ports Group emphasised that moving beyond reliance on retained profits alone is essential to fund the capital-intensive projects in Horizons 2 and 3.

You can read more about our response to this issue in our "Addressing Constraints to Enable Progress" section on page 73.

Partnership is Essential

Across responses, stakeholders emphasised collaboration as the foundation for delivery. No single organisation can resolve the infrastructure constraints or unlock the opportunities this Masterplan identifies. Belfast Harbour will continue to engage openly with all those whose decisions shape the conditions for delivery.

A Plan Shaped by Many



24 months

of engagement from April 2024 to this final Masterplan



230+

Stakeholders identified, mapped and engaged across port users, government, business, community and education



More than 50

Briefings & engagements



4

City-wide public consultation events held across Belfast, open to all



46

Formal responses received



95%

of respondents expressed strong support for our direction and vision



Cross-party support

Endorsed by all main political parties and by Belfast City Council



One clear mandate

Overwhelming endorsement – feedback focused only on how best to deliver

A Long-Term Vision for Growth and Resilience



Belfast Harbour's vision to 2050 is clear. We will remain a thriving working port, a critical economic gateway and a responsible steward of land and coastline at the heart of Belfast. With a clear ambition to serve as the leading port on the Dublin Belfast Economic Corridor, our first responsibility is to safeguard and strengthen trade.



“Belfast Harbour Users’ Group welcomes the Masterplan’s vision for balanced, sustainable growth. As the gateway for 70% of Northern Ireland’s seaborne trade, expanding port operations alongside new industrial and logistics facilities is vital to our economy’s future.”

Paul Grant
Chair of Belfast Harbour Users’ Group
& Trade Director, Stena Line

We will protect port primacy, expand deepwater capacity and ensure infrastructure keeps pace with larger and more frequent vessel calls, evolving supply chains and the demands of the offshore wind industry. Beyond the quayside, we are exploring delivery models to support regeneration that opens up waterfront living and new workspaces. These will strengthen the connections between Belfast Harbour and the communities within and around it.

Five Priorities for 2050

This Masterplan is designed to achieve five outcomes by 2050.

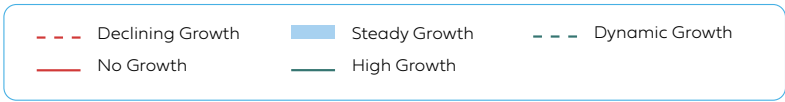
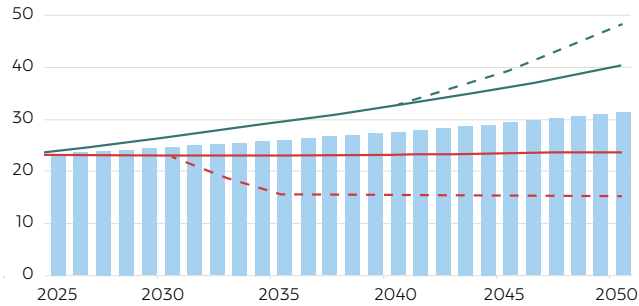
- **Grow** capacity for trade, logistics and port operations.
- **Accelerate** the transition to clean energy.
- **Enable** regeneration that strengthens the city and serves its communities.
- **Protect** biodiversity, open space and waterfront access.
- **Secure** the financial flexibility to prudently invest across all three Horizons.

The Evidence Base for Growth

Independent forecasting underpins this Masterplan. Port-planning experts Haskoning were commissioned to assess future port trade across multiple scenarios to 2050. They held direct consultations with port users and analysed macro-economic and socio-economic trends. These included supply chain change, the energy transition and historic performance data. Their findings are reinforced by the UK Department for Transport’s own assessment of future port demand. Both forecast growth in key sectors including ferries, containers and key bulk trades.

Five scenarios were modelled: dynamic growth, high growth, steady growth, no growth and declining growth. Trade volumes of around 24 million tonnes today are forecast to reach over 31 million tonnes by 2050 – our base case, steady growth scenario. Under high and dynamic growth scenarios, volumes could reach 40 to 50 million tonnes. Under every growth scenario, existing infrastructure is projected to reach full capacity before mid-century without planned investment. Under higher growth pathways, that pressure could emerge up to a decade earlier.

2050 Port Trade Scenarios - Million Tonnes (mT)



The direction of travel is consistent across scenarios. Growth in roll-on, roll-off (RoRo) and lift-on, lift-off (LoLo) freight will be the primary driver. Bulk trades face a more mixed outlook, with declines in carbon-related commodities offset by resilience in agri-food and other sectors. Cruise and offshore wind related cargo are both projected to grow. Planning for this range of outcomes requires infrastructure that is capable, flexible and sequenced to respond to demand as it materialises.

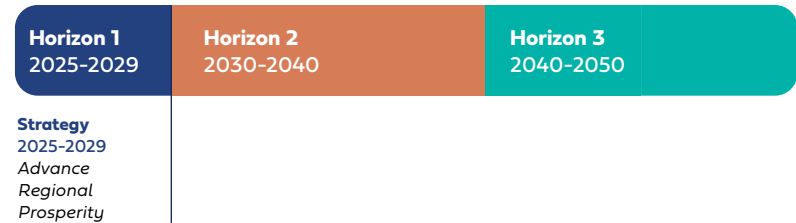
Separate analysis by Deloitte of the Belfast property market points to sustained demand for housing, commercial space and logistics facilities across the estate. This forecasted demand reinforces the case for the regeneration and development ambitions in this Masterplan.

A Phased Framework for Delivery

In response to this evidence, we developed the Three Horizons framework, which phases our investment to 2050 against forecasted demand. This provides clarity while retaining flexibility. Belfast Harbour can adapt to changes in trade, technology and policy without losing direction.

Our Masterplan Spans Three Phases to 2050

The first of these aligns with our five year strategy, published early last year.



Horizon 1 focuses on near-term priorities and enabling infrastructure, with many projects already funded and in delivery. This is articulated in our current five-year strategy: Advance Regional Prosperity.

Horizon 2 advances major port projects, the most significant being the redevelopment of Stormont Wharf. It safeguards and prepares the land and deepwater corridors required for long-term transformation, ensuring strategic capacity is protected as development scales.

Horizon 3 delivers long-term transformation in the 2040s. This includes new terminals through reclamation, a Clean Energy Hub for alternative fuels, and regeneration where disused port land transitions to city use. Horizon 3 will build the infrastructure needed to serve Belfast Harbour and our customers well into the second half of the century.

► Horizon 1

Delivery Underway 2025–2029

Capital Investment of

£313m:

£208m on port, £105m on estate.

£208m

Port

£105m

Estate

Horizon 1 aligns directly with our five-year strategy, Advance Regional Prosperity, published in January 2025. This phase demonstrates that the Masterplan is not a future ambition. It is a programme already in delivery. Funded, consented and live projects are strengthening our role as a working port while advancing regeneration, sustainability and digital capability.

You can learn more about our five-year strategy at belfast-harbour.co.uk/strategy

Strengthening Port Operations

Major operational investments reinforce our commitment to port primacy. Our landmark £90 million investment in D3 aims to deliver a new deepwater quay, cruise terminal and future port capacity. This builds on Belfast Harbour's position as the second busiest cruise port in the UK and the busiest on the island of Ireland. Our investment in D3 will provide a new home for cruise from 2028, freeing our D1 site for the return of offshore wind assembly and marshalling from 2029. That will provide the infrastructure needed to support the build-out of new wind farms in the Irish Sea.



The D3 deepwater quay under construction, spring 2026.



Architect's visualisation of City Quays 5, viewed from City Quays Gardens.

Crane upgrades will continue to modernise our handling fleet, improving discharge speeds, efficiency and sustainability while preparing for next-generation vessels. On the West Bank Road, we will add a fourth linkspan to strengthen RoRo resilience, building on the £45 million recently invested in LoLo infrastructure, including new cranes and heavy-duty ground works. New warehousing and distribution facilities will expand logistics capacity, subject to market demands and the pace of delivery for port infrastructure projects.

Responding to the City's Needs

Horizon 1 includes a significant programme of inner-harbour development. City Quays 4 will deliver 325 new homes, including affordable housing, while City Quays 5 will bring new commercial office space and public realm. Planning consent for both CQ4 and CQ5 is already secured.

Clarendon Wharf is advancing through the planning process, with proposals for up to 600 new homes and mixed-use spaces that will extend regeneration along the waterfront. Delivering a project of this scale means finding the right commercial partners. Active travel routes will be integrated into all our developments, strengthening connections between the estate and the wider city.

These projects complement the ongoing work in partnership with Titanic Quarter Limited, including 778 homes at the Loft Lines project, where new residents are already settling in.



City Quays Gardens



A concept visual of the proposed Maritime Skills Academy.

Building Capability and Skills

Horizon 1 also sees us continuing to invest in people. The Maritime Skills Academy at Ballast Quay will equip a new generation with the technical skills required for port operations, offshore energy and specialised logistics. The Ballast Quay location reflects its role as a bridge between the working port and the communities around it. The operating model is being developed, but the site is identified and the need is clear. Training will align with emerging industry demand, ensuring that local talent can access high-quality, long-term employment as the port evolves for inclusive growth.



The Harlander autonomous passenger shuttle bus during the trial period.

A Future-Ready Digital Port

Alongside physical infrastructure, Horizon 1 will establish the digital foundation for the port's future. The objective is an integrated, data-driven operating model that improves safety, productivity and resilience.

Early results are already visible. Digitalised documentation has reduced paperwork and improved the speed of administration. Expanded connectivity and live monitoring improve situational awareness and operational response. Automated environmental and fuel monitoring improve safety and compliance while reducing manual inspections.

This digital foundation will support predictive maintenance, intelligent asset scheduling and advanced analytics in later horizons. It ensures that automation is built on stable, integrated systems rather than retrofitted to ageing ones.

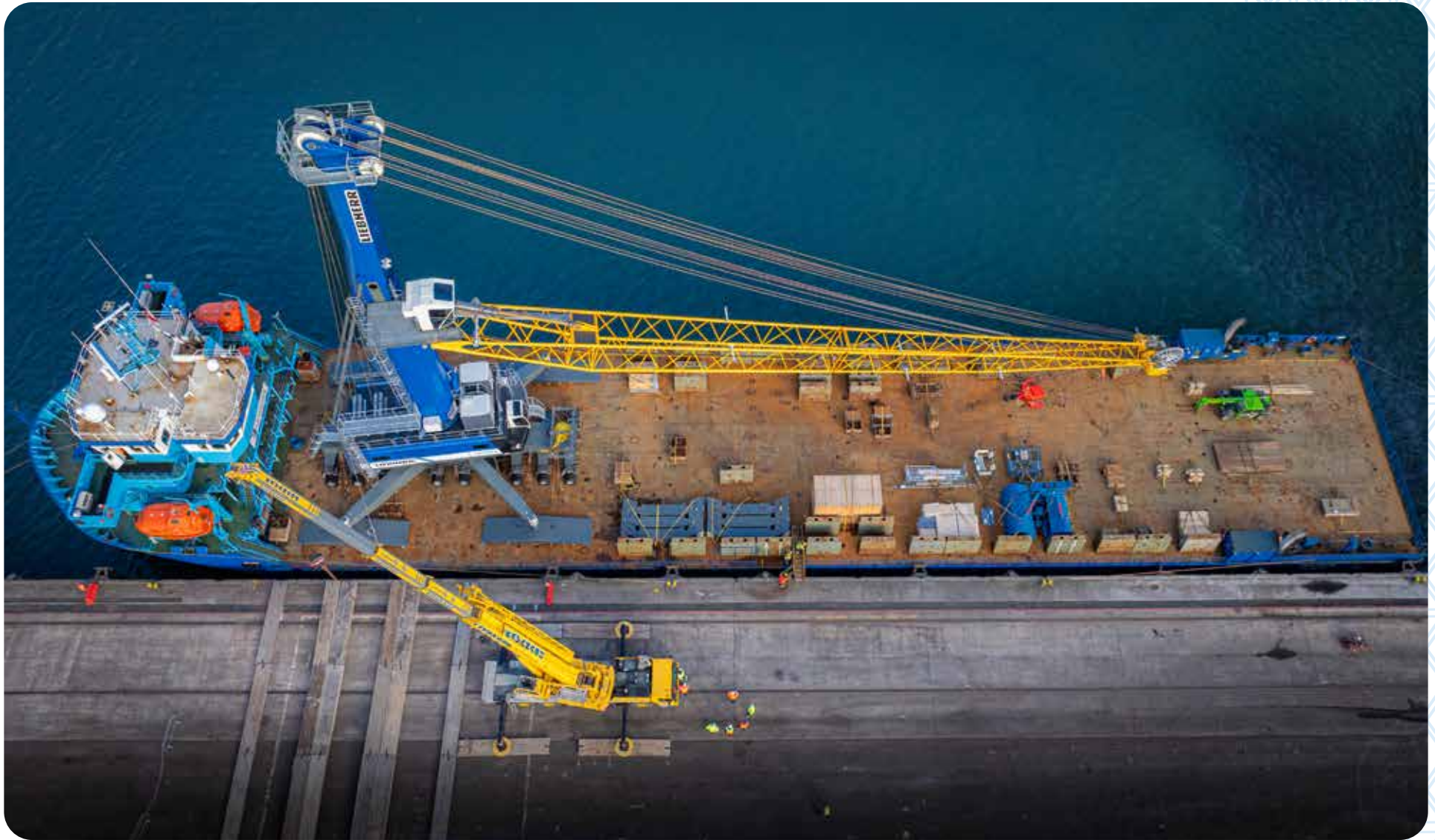
In Horizon 1, Belfast Harbour launched Project Harlander, a trial autonomous passenger shuttle service that achieved a 92% passenger satisfaction rate. It also generated valuable insights into commuter behaviour and the regulatory landscape for autonomous transport.

Delivering Now, Enabling What Comes Next

By 2029, Belfast Harbour will be stronger, more resilient and digitally enabled. We will be ready to accelerate into the next phase of growth.



A new crane being installed in spring 2026, as part of our Horizon 1 crane upgrade plans.



A new crane being installed in spring 2026, as part of our Horizon 1 crane upgrade plans.

► Horizon 2

Accelerating Advantage 2030–2040

Capital Investment of

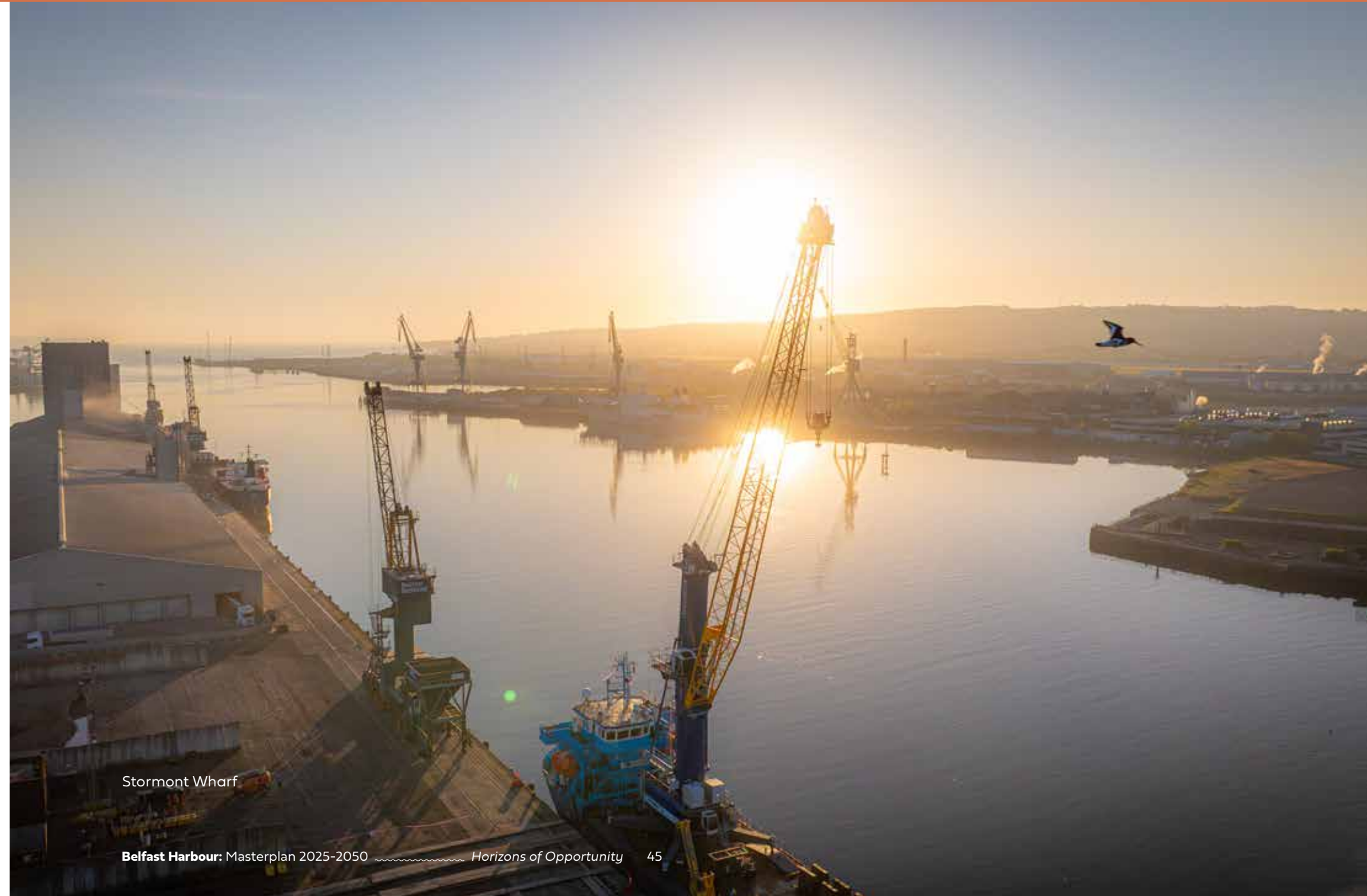
£484m on port

Horizon 2 is the decade where investment scales and strategic advantage take hold. Building on the foundations established in Horizon 1, this phase will expand port operational capacity and drive regeneration and sustainable integration across the estate. Investment during this period will respond to trade growth, energy transition and supply chain resilience at regional and island-wide scale.

Reinforcing Port Primacy

The rebuilding of Stormont Wharf and construction of new logistics facilities beside the Airport will expand capacity for freight and advanced logistics. These projects safeguard land for core port functions while accommodating larger vessels and increased trade volumes.

The priority project for Horizon 2 is the rebuilding of Stormont Wharf. This aims to further strengthen our deepwater capability and operational resilience, and we plan to complete consenting by the end of Horizon 1. The detail and scope of works for this project will be determined in partnership with our customers.



Stormont Wharf



A concept visual of the proposed Airport Logistics Park.

Meanwhile, the new Airport Logistics Park will enhance connectivity between maritime, air and road networks, supporting time-sensitive and high-value supply chains. Together, these investments protect competitiveness and secure long-term trade capacity.

The quay at Victoria Terminal 3 (VT3) will be extended and deepened to handle the next generation of larger vessels on Irish Sea routes, subject to confirmed demand from shipping operators.

VT3 must keep pace with that shift to protect Belfast Harbour's position as NI's principal container port. This investment will also reinforce our standing as a critical hub in the all-island port system, and our aim to be the leading port on the Dublin Belfast Economic Corridor.

Deloitte's independent analysis points to a longer-term shortfall in high-quality logistics space across the Belfast market. Warehousing and distribution capacity will expand to meet this demand and strengthen regional supply chains.

Customers require sustainable logistics space close to transport networks. The new logistics park will meet that demand directly, attracting investment, supporting trade growth and reinforcing the estate's role as a centre of regional employment.

Cleaner Power, Greener Places

Stage 2 of D3, our cruise terminal and deepwater quay, will secure its capability to handle next-generation offshore wind components. This will sustain our role as a critical hub for offshore wind assembly, installation and maintenance, bringing new opportunities for local enterprises and reinforcing Belfast Harbour's position in the clean energy supply chain.

The decade will see the first major roll-out of shore power across key berths, subject to external infrastructure investment and government support. This will allow vessels to turn off their engines while docked, cutting emissions and keeping Belfast Harbour competitive as the maritime sector moves towards net zero.



Victoria Terminal 3 (VT3) Container Port



Concept visual of the proposed expansion to Belfast Harbour Marina.

Homes, Workspaces and Leisure

Regeneration will continue at sites in the inner harbour. With the right commercial partnerships in place, Clarendon Wharf and Albert Quay can deliver new homes, workplaces and public realm spaces. These will extend the success of City Quays and Titanic Quarter northwards along the waterfront, in line with Belfast City Council's plans for the Greater Clarendon and Sailortown area.

In support of the goals of the Belfast Agenda, we intend to bring forward up to 3,500 new homes across the estate, in line with the Belfast Local Development Plan 2035. Clarendon Wharf will contribute up to 600 of these, adding to already delivered City Quays 4 (325 homes) and Loft Lines (778 homes). The balance will be developed across Titanic Quarter, Greater Clarendon and Sailortown.

As port activity moves progressively seaward, land that is no longer required for operational use will transition to residential and mixed-use development – starting with the sites closest to the city. No land will be released for redevelopment while it remains active or in demand for port or industrial operations.

Overall, this Masterplan identifies real estate opportunities worth £500 million to £750 million over 25 years. Delivering these projects will be phased and subject to Belfast Harbour securing the right commercial partners and funding models. Meanwhile, a range of intermediate uses will sit between the port's more intensive operational areas and these new residential communities.



“ We welcome Belfast Harbour’s plans for sustainable growth and regeneration. This work, alongside plans for the Sailortown – Queen’s Island bridge, will help connect communities surrounding the Harbour, strengthening Belfast’s reputation as a dynamic, inclusive, and connected waterfront city with a real sense of place.”

Councillor Tracy Kelly
Lord Mayor of Belfast

These will include the Maritime Skills Academy, offering skills training and employment pathways alongside high-quality public realm and green space – creating a transition zone that reflects the working character of the port while supporting new communities.

The Belfast Harbour Marina will also expand in phases during this period, increasing berthing capacity and boosting leisure and tourism growth. Green infrastructure, biodiversity corridors and high-quality waterfront spaces will be embedded into new development areas.

Belfast Harbour will work with the Department for Infrastructure to support delivery of the Belfast Cycling Network and the emerging Active Travel Delivery Plan. Depending on their final proposals, this will include a protected active travel route linking the estate to the wider regional greenway network. The ambition is a coast-to-city blueway experience, extending connections from the edge of the Harbour Estate into Ards and North Down.

A Decade of Visible Progress

By 2040, Belfast Harbour will have greater capacity, stronger resilience and will be more competitive. Waterfront neighbourhoods will have taken shape, infrastructure will be better integrated, and the benefits of long-term planning will be visible at scale.





Architect's visualisation of the proposed Clarendon Wharf development.

► Horizon 3

Long-Term Ambition 2040–2050

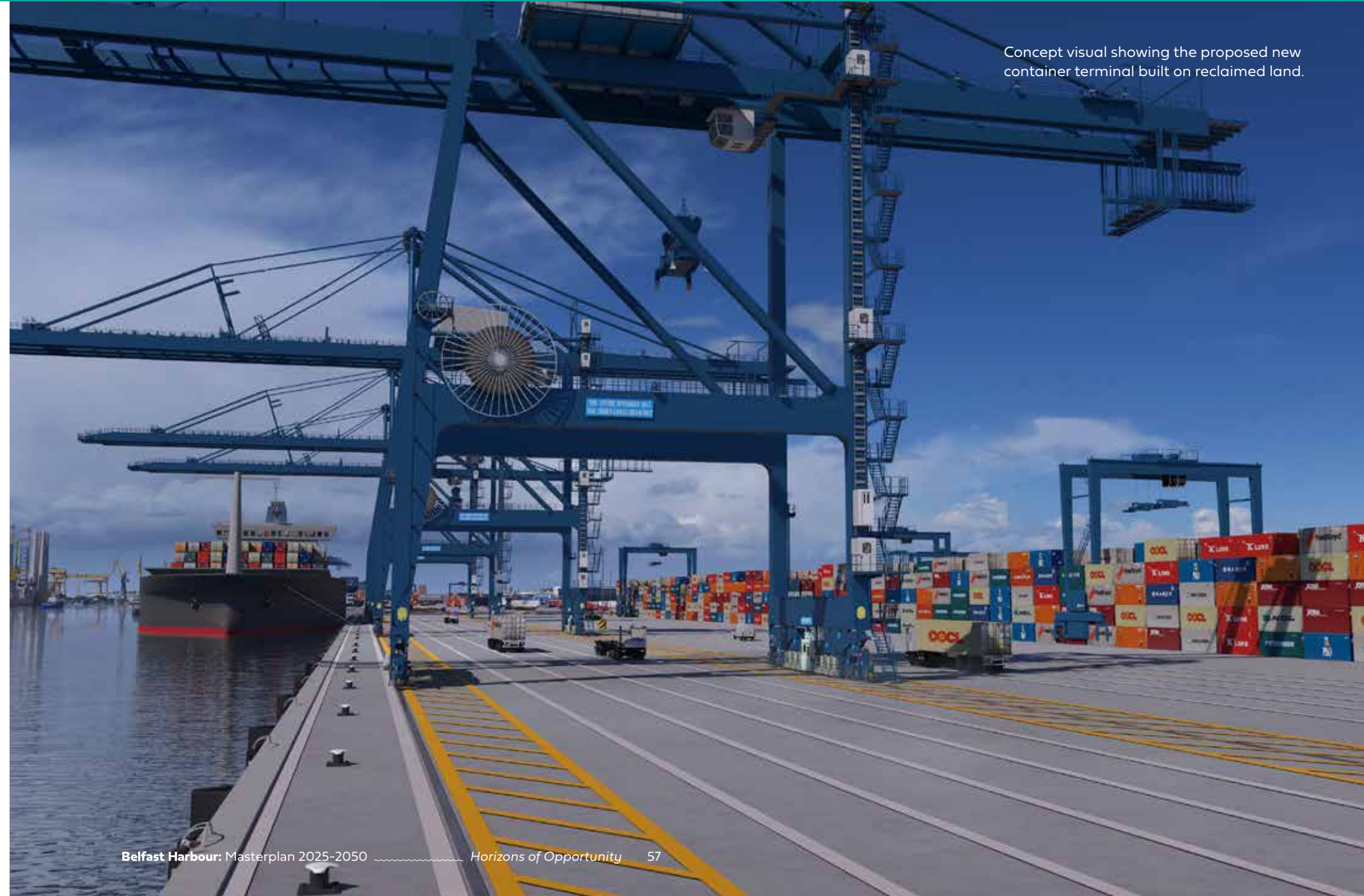
Capital Investment of
£578m on port

Horizon 3 looks beyond incremental expansion to long-term transformation. By this stage, Belfast Harbour will have strengthened operational resilience, embedded digital capability and delivered major regeneration. It is also the horizon in which we aim to consolidate our position as the principal port on the Dublin Belfast Economic Corridor – strengthening the east-west trade links with Great Britain that underpin the NI economy.

This phase protects strategic land, water and infrastructure corridors so that growth remains possible under changing conditions. It positions Belfast Harbour to serve future generations as policy, trade patterns, climate demands and technologies continue to evolve.

Reclamation for Growth

Central to Horizon 3 is new cargo capacity delivered through reclamation at the end of the West Bank Road. A new terminal at this location would help meet forecasted growth in trade while creating space to accommodate larger vessels and evolving freight formats.



Concept visual showing the proposed new container terminal built on reclaimed land.



Concept visual showing the use of D1 deepwater quay to support the deployment of offshore wind turbines.

Reclamation is part of Belfast's story. Much of the port, and even Titanic Quarter, was built this way. Twenty-five years ago, the last major reclamation project created Victoria Terminal 4, which now hosts the Stena Line service to Scotland.

West Bank Road is the logical location for future expansion. It already hosts three ferry terminals and the container terminal, with strong road access. Co-locating additional capacity here strengthens efficiency, reduces cost and improves sustainability. Belfast Harbour previously held planning consent for such a development at this location.

New terminals will integrate digital systems, low-carbon energy supply and adaptable layouts capable of supporting future cargo types and operational technologies. Climate resilience is embedded in our plans here from the outset – including stronger quay structures, drainage upgrades and allowances for sea-level rise.

This phase also presents the next opportunity to consider deepening the approach channels, responding to vessel size requirements as they evolve through the 2040s.

Enabling the Low-Carbon Economy

By 2040, subject to government policy, the transition to a low-carbon economy will be well advanced. Horizon 3 positions Belfast Harbour as a hub for offshore wind assembly, alternative fuels, electrified logistics and clean maritime operations.

To support the shift to lower carbon fuels for shipping, we plan to establish a Clean Energy Hub on the estate. It will provide infrastructure for new fuels with appropriate storage, safety systems and connections to wider distribution networks. These future fuels could include methanol, ammonia, hydrogen and advanced biofuels. The Clean Energy Hub will also serve the offshore wind supply chain with space for components and maintenance.

The goal is a flexible cluster that adapts as technologies mature. Shore power coverage will extend to more berths during this period. Expanded deepwater access and heavy-lift capability will support the construction, maintenance and export of renewable energy components. We will monitor emerging policy and market trends throughout, allowing us to respond and flex our approach as the energy landscape evolves.



Reimagining the Waterfront

As port operations move seaward, waterfront land that is no longer needed for operational use can be reimagined. In Horizon 3, we will work with partners to bring forward development within Titanic Quarter and adjoining waterfront zones – creating places where commerce, community and nature sit side by side.

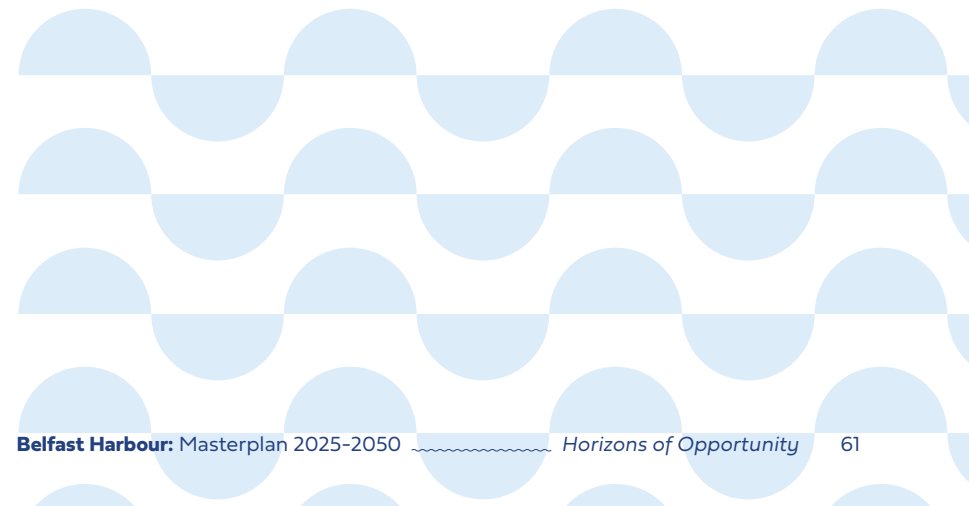
The active travel route established in Horizon 2 will extend across new and regenerated areas. New streets, public spaces and a further expanded marina will knit districts together and encourage people to live, work and spend time by the water. This part of Belfast Harbour will develop into a coherent urban quarter, connecting the estate more closely with the wider city.

Future-Proofing Infrastructure

As development scales in Horizon 3, Belfast Harbour will make it a priority that key road, energy and marine access routes are not compromised by new construction. Space will be preserved for the infrastructure that future trade, technology and clean energy will require. What we build in the 2040s will not limit what becomes possible in the decades that follow.

A Platform for the Next 50 Years

Horizon 3 completes the long-term arc of this Masterplan. By 2050, Belfast Harbour will be larger in scale, lower in carbon intensity and more adaptable in function – secured as a key hub for East-West trade, the leading port on the Dublin Belfast Economic Corridor, and equipped to support prosperity well beyond the life of this plan.





Architect's visual of the reimagined waterfront in Titanic Quarter.
Image courtesy of Titanic Quarter Limited / FaulknerBrowns

Zoning to 2050

This Zoning Map sets out the long-term spatial structure for Belfast Harbour to 2050. It identifies how land and water across the estate will be safeguarded and developed over time.

These zones protect core port and industrial uses, enable growth in logistics and clean energy, and define areas for regeneration and public realm. The consultation process confirmed strong support for the zones shown in this approach.



- Sustain & Increase Port Capacity
- Embrace the Belfast Waterfront
- Enable Industry & Commerce
- Redevelop the Inner Harbour
- Protect Nature for Community Benefit
- Support Connectivity & Tourism
- Facilitate the Shift to Clean Energy

This is a simplified view designed to make our draft plans more accessible. A detailed source map can be downloaded at belfast-harbour.co.uk/detail-map
Map data © OpenStreetMap contributors, available under the Open Database Licence

Strategic Growth Shared Prosperity



Belfast Harbour is a key economic driver for the region. This Masterplan extends and deepens that role to 2050.

Future investment is projected to generate measurable economic benefit across all three horizons. Total capital expenditure across the three horizons is estimated at £1.3 billion.

Ulster University Economic Policy Centre has calculated the full economic value of trade through Belfast Harbour by 2050. Trade today supports £26.7 billion in goods and £8.8 billion in GVA (gross value added).

By 2050, those figures rise to £36.2 billion and £12.0 billion respectively in our steady growth scenario – and to £46.4 billion and £15.3 billion in our high growth scenario. The port's success directly advances regional prosperity.

Growth That Benefits the Region

Investment in capacity will safeguard existing trade and enable new opportunities. This supports manufacturing, agri-food, construction, retail, and the circular economy across NI and beyond. Jobs will be created on the estate, in construction and across supply chains, and the Maritime Skills Academy will provide clear routes into maritime, logistics and offshore energy roles. These are long-term industries offering skilled employment.



Sustainability as an Enabler not a Constraint



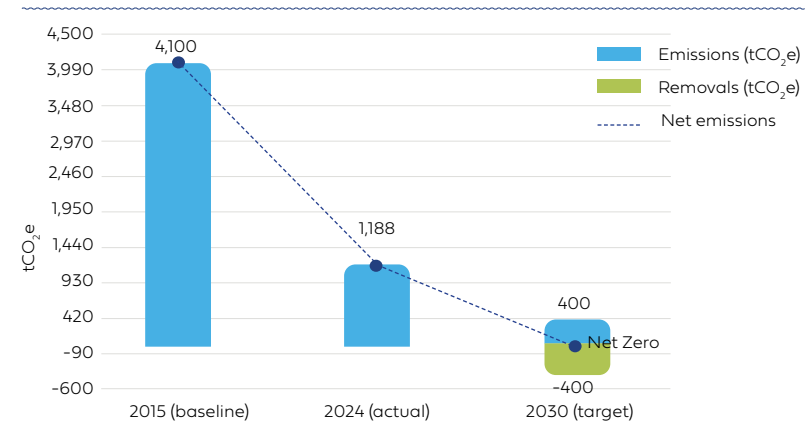
Sustainability is central to this Masterplan, not an afterthought. Belfast Harbour is committed to growth that supports a low-carbon economy – balancing environmental goals with the practicalities of a working port. Climate resilience and responsible stewardship are not just the right thing to do. They keep us competitive and help attract global investment to the city. As policy continues to support climate action, we intend to keep leading in this space.

We are on track to achieve net zero greenhouse gas emissions from our own operations ahead of our 2030 target. This commitment applies to Scope 1 and Scope 2 emissions and reflects a decade of sustained action.

Since 2015, we have reduced operational emissions by more than 70%, from approximately 4,100 tCO₂e to 1,188 tCO₂e in 2024. This was achieved while doubling business turnover over the same period. This puts us on track to be the first net-zero port operator on the island, well in advance of our 2030 target.

Progress has been driven by 100% renewable electricity procurement, the replacement of gas oil with biofuels across our marine fleet and some cranes, electrification of ground vehicles and equipment, and systematic energy efficiency improvements across the estate.

By 2027, we expect to have reduced emissions by over 93% against our 2015 baseline.



Accelerating to Net Zero

Directly responding to current government policy, our Climate Action Strategy sets a structured pathway to 2030 and beyond, built around three priorities:

- Reducing our own emissions
- Adapting to climate risks
- Supporting the clean energy transition

These priorities help inform investment decisions across the Masterplan.

Reducing emissions means transitioning to affordable, low-carbon equipment and energy systems, integrating renewable generation and developing the shore power and future fuels infrastructure our customers need to decarbonise. Where viability depends on government support, we will work with partners and policymakers to unlock it.

Adapting to climate risk means embedding resilience into long-term planning and asset design. Sea level rise, extreme weather and changing environmental conditions are factored into infrastructure decisions from the outset. This is not a future precaution. It is a design requirement for every project we build today.



“Sailortown Regeneration Group’s long-term aim is to re-create a vibrant inner-city urban village in Belfast Docks. This Masterplan offers an opportunity to deliver high-quality, mixed-tenure housing for local communities and we look forward to collaborating on placemaking.”

Terry McKeown
Sailortown Regeneration Group

Nature Positive Development

Belfast Harbour operates within an ecologically sensitive setting. Our sustainability framework commits us to protecting and enhancing biodiversity across the estate, with approximately 125 acres designated for terrestrial nature recovery – including the RSPB Harbour Reserve, the Nature Conservation Area, the Tillysburn River Corridor and coastal habitats along Airport Road West.

We work with environmental organisations and academic institutions on habitat enhancement, native oyster reef restoration and coastal monitoring. Our 33,815 trees sequester an estimated 394 tCO₂e per year. Where development is necessary, we will follow a clear hierarchy: avoid ecological impact first, minimise it where unavoidable, and enhance wherever we can – subject to consenting processes and the agreement of relevant authorities.

Towards a Published Sustainability Strategy

The internal sustainability frameworks supporting this Masterplan will be brought together in a published, stakeholder-facing Sustainability Strategy during Horizon 1. It will set clear climate and nature targets, align with recognised reporting standards and define measurable outcomes.

Through this Masterplan and its embedded sustainability approach, we will protect and enhance the natural assets within the estate for the long-term benefit of the communities around us.





Addressing Constraints to Enable Progress



Belfast Harbour's ambition for the next 25 years cannot be delivered by the port alone. Sea access, land connectivity, utilities infrastructure – and funding our plans – are not background considerations. They are fundamental to trade, regeneration and regional prosperity. Where they fall short, growth stalls regardless of what Belfast Harbour invests within its own boundary.

Planning and Policy Alignment

Nearly every capital project in this Masterplan must pass through statutory planning and secure the necessary environmental consents. Delivery will depend on policy alignment, community support and strong working relationships with Belfast City Council and the NI Executive.

A Recognised Regional Challenge

The infrastructure constraints facing Belfast Harbour – transport connections, grid capacity and wastewater provision – are not unique to us. In 2026, the Institute of Directors NI published an Infrastructure and Investment Action Plan, informed by structured workshops with over 200 senior business leaders. Its findings were unambiguous: 89% of respondents said their business had been impacted by planning delays or lack of infrastructure delivery. The report concluded that NI cannot remain competitive without more coordinated, evidence-based prioritisation of infrastructure at scale. You can view their report at belfast-harbour.co.uk/loD



“ We welcome the ambition and commitment set out in this 2050 Masterplan. Belfast Harbour is a vital economic asset that is key to future economic growth right across Northern Ireland and supports the work of Invest NI to promote business development and inward investment.”

Kieran Donoghue
CEO, Invest NI

Land Connectivity

Efficient road, rail and active travel links are critical to port operations and estate development. Within the estate, Belfast Harbour will continue to invest in internal roads, junction improvements, pedestrian routes and cycle infrastructure. The active travel route planned along Airport Road, connecting into the wider active travel network, will strengthen safe access for commuters and visitors while linking the estate to regional greenways – subject to the relevant local authorities advancing their own plans.

Beyond the estate boundary, delivery depends on coordinated action by the responsible authorities. Strategic road upgrades – such as the proposed York Street Interchange - rail enhancements and public transport provision sit within the remit of government departments and agencies. We commit to keeping relevant departments and agencies informed of our progress and requirements as each horizon develops.

Utilities Infrastructure

Utilities capacity is equally critical. Wastewater treatment and electricity grid reinforcement are enabling foundations for development across the port and the wider estate.

Wastewater treatment capacity across the Belfast area is a known and documented constraint. Without additional headroom, commercial and residential projects may not proceed at pace. The NI Fiscal Council has concluded that the current funding model for water infrastructure is unsustainable. Until it is resolved, regeneration will be slower and housing delivery constrained – this could impact our delivery of homes in Horizon 2.

Finally, electricity grid availability will determine the scale and speed of electrification, renewable integration and shore power deployment. These issues sit at the heart of decarbonisation, affordability and growth.

An Evolved Approach to Partnership

If this Masterplan is to be delivered at scale, a more structured and collaborative approach to infrastructure planning is required across government, regulators and the private sector. Belfast Harbour stands ready to support these collective efforts as part of a wider partnership.

Funding and Financial Discipline

As a Trust Port, Belfast Harbour invests all post-tax profits in the port and estate – a model that has funded significant capital projects over the past decade and will finance Horizon 1's delivery. Horizons 2 and 3 require more. As a public corporation for accounting purposes, any commercial borrowing counts against the Department for Infrastructure's budget. Reclassification of our accounting status would remove that constraint and unlock the financial flexibility this Masterplan requires.

Without reclassification, Belfast Harbour can still invest – but must make harder choices about pace and scope at precisely the moment trade forecasts demand both. Port projects will remain the priority, but constrained funding will mean slower delivery and greater selectivity.

The NI Executive supports reclassification of all NI Trust Ports and legislation is being prepared for the Assembly. If passed, it will enable the Office for National Statistics to act – removing the borrowing constraint and unlocking the full potential of this Masterplan.

You can learn more about reclassification, and the benefits we believe it can deliver at belfast-harbour.co.uk/reclassification



“As a long-standing customer of Belfast Harbour, W&R Barnett fully supports the focus on investing in port infrastructure. Strategic projects such as Stormont Wharf are critical to ensuring agri-food supply chain efficiency and keeping Northern Ireland competitive.”

Claudine Heron
*Agri Division Chief Executive,
W&R Barnett*



A Generational Commitment



This Masterplan sets a clear direction to 2050. It is ambitious, practical and grounded in delivery. Belfast Harbour is committed to implementing it responsibly and transparently. We will invest with discipline, report openly, measure progress and adapt where required. Long-term stewardship demands nothing less.

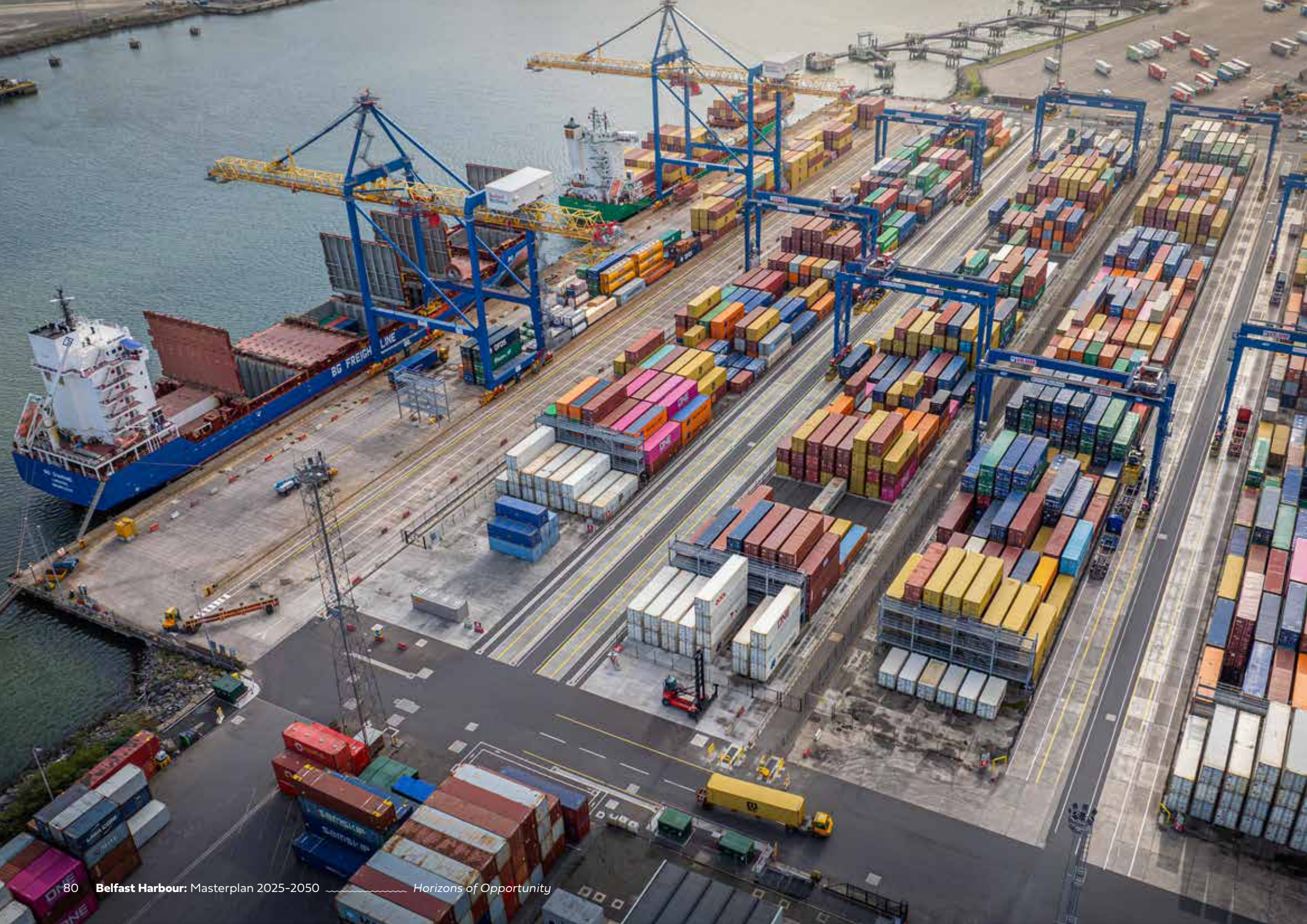
The scale of what is at stake is clear. This is not just Belfast Harbour's opportunity – it is Northern Ireland's, and through our position on the Dublin Belfast Economic Corridor, one that extends along the island's eastern seaboard and strengthens east-west trade with Great Britain.

Success depends on partnership. Government, regulators, residents, tenants, customers, communities and civic leaders all have a role to play. The scale of opportunity ahead cannot be realised by any single organisation acting alone.

As a Trust Port, we act in the long-term interests of the economy, society and the environment. We invest all post-tax profits to strengthen infrastructure, resilience and regeneration. We do not plan in isolation, but for the generations who will depend on what we build and protect today.

Work with us. Support the decisions, legislation and partnerships that will determine whether the region's principal port reaches its full potential. The case for action is clear. The framework is in place. The future is ours to shape, together.







**Belfast
Harbour**
Masterplan
2025-50

Horizons of
Opportunity



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