

Statistical Bulletin





Sea transport, 2020

24 November 2021 SB 37/2021

This release provides an analysis of data relating to Sea transport in Wales in 2020. This period was affected by the coronavirus (COVID-19) pandemic and the lead up to EU exit (see page 2 for further detail).

Key points



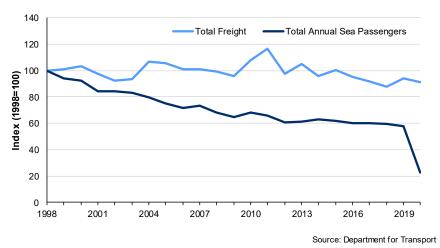
Total freight tonnage at Welsh ports decreased by 3.2% in 2020 to 51.3 million tonnes (Mt).

Of total freight at major ports in Wales, 87.0% was foreign traffic with 74.8% of this traffic being imports. The majority of foreign imports and exports consisted of bulk products including crude oil, oil products, liquefied gas and ores.

Welsh ports also act as a gateway between the Republic of Ireland and the rest of Europe.

Over 80.0% of goods carried on Irish registered heavy goods vehicles (HGVs) between the Republic of Ireland and Europe passed through Welsh ports, equivalent to 0.5Mt. 72.5% of the total volume passed through Holyhead port.

Chart 1: Indices for Sea freight and passenger, 1998 - 2020



- Over the long term, total sea passenger movement between the Republic of Ireland and Wales has declined.
- In 2020 sea passenger traffic decreased by 60.3% in 2020 compared to 2019

About this bulletin

This annual statistical bulletin sets out information about ports in Wales for 2020. It covers the freight traffic through these ports; passengers and freight traffic between Wales and the Republic of Ireland: and ship arrivals at Welsh ports. This bulletin provides key analysis with tables of underlying data available on the **StatsWales** website.

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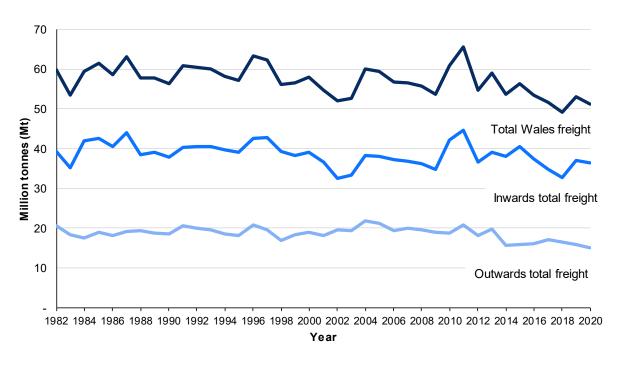
Impact of COVID-19 and EU Exit on Sea Transport

Note: These statistics relate to the 2020 calendar year, and therefore will be affected by restrictions in controlling the spread of coronavirus (COVID-19). In addition, the lead up to the UK's European Union (EU) exit impacted movement of goods and passengers through Welsh ports. The immediate observable result was a reduction in sea passengers, both inwards and outwards at Welsh Ports. However, there was not a significant drop in sea freight. The impact of EU exit will become more pronounced and noticeable as more recent data is published.

Section 1: Sea Freight

This section looks at domestic and foreign freight traffic by type of freight and movement between regions. Total freight tonnage through Welsh ports in 2020 was 51.3 million tonnes (Mt) (Chart 2). This has been gradually falling over the last 50 years. In 2020 freight tonnage fell by 3.1% compared to 2019.

Chart 2: Freight through Welsh ports, 1982 to 2020



Source: Department for Transport

Of the 51.3 Mt of freight through Welsh ports, 36.0 Mt were goods inwards and 15.0 Mt were goods outwards. Inwards total freight represented 70.8% of all freight by sea for Wales in 2020. The remaining was Outward freight (29.2%)

Freight through Welsh ports accounted for 11.7% of the total tonnage through UK ports in 2020. The largest components of freight through Welsh ports in 2020 were:

- Oil products, with total volume of 14.8 Mt, of which nearly 9.1 Mt were goods outwards. 3.1
 Mt were sent to destinations elsewhere in the UK and 6.1 Mt were exported to the rest of
 the world.
- Liquefied gas, with total volume of 10.1 Mt, the majority (98.7%) being foreign imports
- Crude oil, with total volume of 8.5 Mt, most of which were foreign imports at 7.1 Mt.

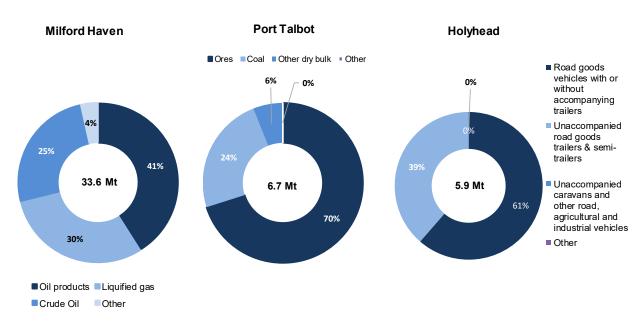
The main ports in Wales

Major ports in Wales handled a total of 50.6 Mt of freight cargo (98.8% of total Welsh sea freight) in 2020. This represents a 3.1% reduction in sea freight through Major ports compared to 2019.

Three of the main ports in Wales meet specialised shipping needs (Chart 3 and Chart 4) (Map):

- Milford Haven handled 33.6Mt of freight in 2020 mainly made up of crude oil, oil products and liquefied natural gas. These three products accounted for 96% of all Cargo at this port in 2020
- Port Talbot handled 6.7Mt of freight in 2020, mainly made up of iron ore, coal and 'Other dry bulk' mostly for the adjacent steelworks. These three products accounted for 100% of all Cargo at this port in 2020
- Holyhead is the main port for freight and sea passenger transport with the Irish Republic. It handled 5.9 Mt of freight in 2020. Top three cargo accounted for 99.9% of all Cargo at this port in 2020.

Chart 3: Sea freight through major Welsh ports, 2020

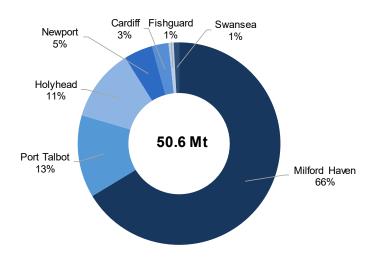


Source: Welsh Government analysis of Department for Transport Maritime data

Milford Haven is the largest port in Wales and the third largest port in the UK by volume of freight as of 2020, predominantly through oil and gas. It handled 33.6 Mt of freight in 2020, which was 7.7% of the UK total for 2020. Freight tonnage at Milford Haven accounts for two thirds of all Welsh port freight. When compared with 2019, Milford Haven freight traffic decreased by 1.2 Mt (-3.9%)

(see <u>StatsWales</u>) (Chart 4). Holyhead Port was the only port in Wales that registered an increase in freight Traffic, up by 10%. The increase was due to increased freight capacity as a result of changes in ferries reclassification¹, weekend increased tonnage by Irish ferries and uncertainty surrounding EU exit that led to increased demand and stock piling towards in the last quarter of year 2020.

Chart 4: Total freight by Welsh major ports, 2020



Source: Welsh Government analysis of Department for Transport Maritime data

The other major ports include Fishguard, Swansea, Cardiff, and Newport (Map) and there are also a number of minor ports in Wales: Barry, Mostyn, Neath, Llanddulas, Port Penrhyn and Burry Port.

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¹ Some ferry companies changed vessels, increasing freight capacity.

Map: Major Sea port locations in Wales



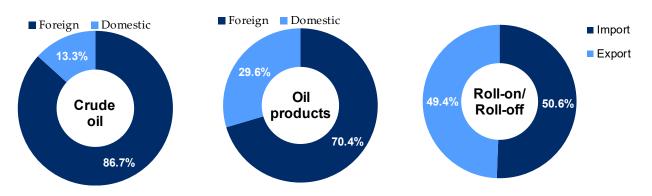
Domestic and Foreign freight by cargo

This section covers the movement of sea cargo tonnage via Welsh ports, with domestic traffic referring to coastwise movement (between Welsh ports) and foreign traffic referring to the movement of cargo to overseas destinations. In 2020, 87.0% of traffic at major ports in Wales was foreign traffic with 74.8% of this traffic being imports.

Comparing domestic and foreign traffic:

- 86.7% of crude oil traffic through the ports of Wales was foreign traffic (83.8% imports, 2.9% exports). The remaining 13.3% was domestic traffic, consisting entirely of Inwards domestic traffic (Chart 5).
- 70.4% of oil products traffic was foreign traffic, (41.1% exports and 29.3% imports). The remaining 29.6% of oil products was domestic traffic (8.7% Inwards and 20.8% Outwards).
- For roll-on/roll-off traffic consists entirely of foreign traffic there was an even split between imports and exports cargo (Chart 5).

Chart 5: Foreign Traffic at major Welsh ports, 2020



Source: Welsh Government analysis of Department for Transport data

When looking at foreign imports and exports:

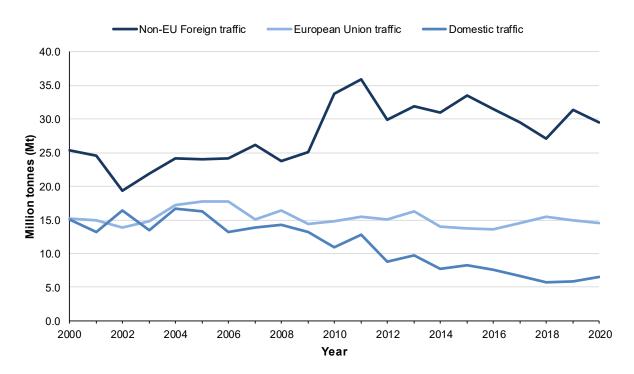
- imports were higher than exports, with 32.9 Mt and 11.1 Mt respectively
- The majority of traffic was either liquid bulk (33.7 Mt) or dry bulk (8.3 Mt). Liquid bulk includes products such as liquefied gas, crude oil, oil products, and dry bulk includes coal and ores.
- Liquid bulk imports decreased by 6.1% in 2020, whilst liquid bulk exports decreased by 13.4% compared with 2019. Dry bulk increased during the same period.

Sea freight by region

Sea freight is viewed by regional origin and destination that includes Domestic Traffic, European Union (EU) traffic and Non-European traffic. Most freight movements are between Welsh ports and the Non-European region (Chart 6). In 2020 Non-European region freight from Welsh major ports accounted for 58.0% of all regional traffic with the dominant commodities being Crude Oil Products and Ores.

At the regional level Imports from non-EU countries into Wales have been proportionately higher compared to imports from EU countries or domestic region. However, total exports to the EU region are much higher compared to exports whose destination is outside the EU.

Chart 6: Sea Freight by region via Welsh ports, 2000 to 2020

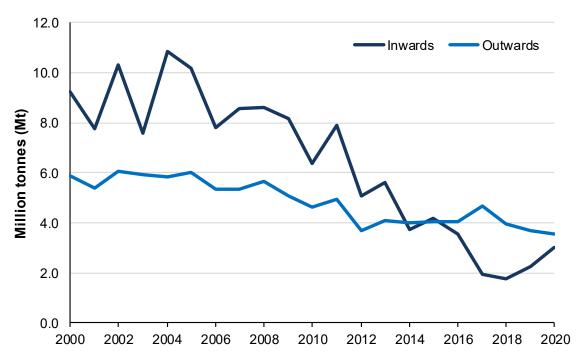


Source: Welsh Government analysis of Department for Transport Maritime data

Domestic Traffic

The section covers Wales sea coastwise freight movements, i.e. freight shipped between United Kingdom (UK) ports. Since 2015, outward sea freight have surpassed inwards traffic (Chart 7).

Chart 7: Domestic freight movements between Welsh ports and UK ports, 2000 to 2020



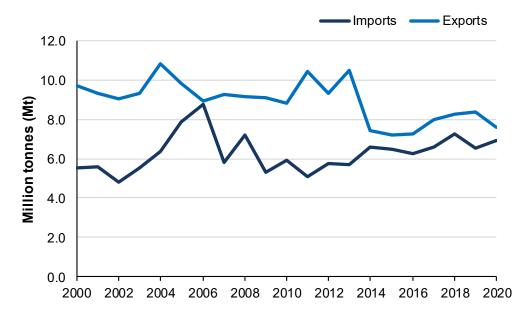
Source: Welsh Government analysis of Department for Transport Maritime data

European Union Traffic

This section covers sea freight movement between Wales and countries from the EU and looks at total sea imports and exports from major ports. In 2020 total sea freight exports to the EU fell by 0.8 Mt (9.0%) compared to 2019. This may be due to reasons such as the COVID-19 pandemic and uncertainty surrounding EU exit.

- The volume of exports by sea from Welsh ports have been fluctuating downwards from a high of in 10.9 Mt in 2004 to 7.2 Mt in 2015 before picking up in 2016 until 2019 (Chart 8).
- Imports from the EU increased over the same period with the highest volume recorded before the 2007 global financial crisis that saw total imports fall by 33.0% compared to 2006. However, imports generally increased between 2012 until 2018. In 2020, there was a 6.0% increase in total imports from the EU.

Chart 8: Freight imports and exports between Welsh ports and EU, 2000 to 2020

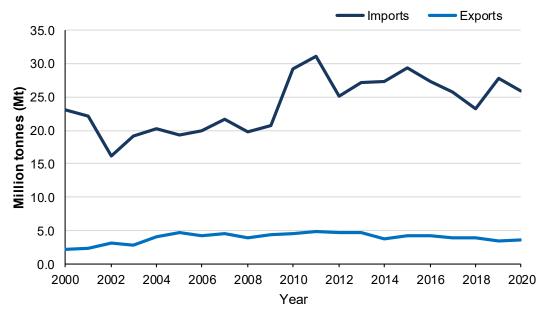


Source: Welsh Government analysis of Department for Transport Maritime data

Non-European Union Traffic

Most sea trade with Non-EU countries involves imports into Welsh ports. Exports were fairly stable between 2005 and 2013 and have since decreased (Chart 9). In 2020 there was a marginal increase from 2019 in total exports to non-EU destinations by 1.0% whilst imports fell by 7.0%.

Chart 9: Freight imports and exports between Welsh ports and Non EU, 2000 to 2020



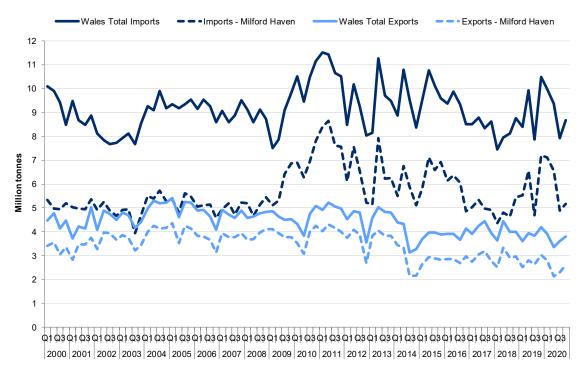
Source: Welsh Government analysis of Department for Transport Maritime data

Quarterly Imports and exports

This section looks at quarterly sea freight through major ports in Wales. Figures for Wales largely reflect activity at Milford Haven. Imports to Milford Haven had increased significantly from 2009 to 2011 and remained relatively high for a few years before falling again. However in 2020, total freight at Milford dropped by 3.9% compared to 2019.

- In 2020, Milford Haven total imports fell in fourth quarter to 5.16Mt, a decrease of 28.0% compared to the same quarter in 2019.
- Exports from Milford Haven have been relatively stable in recent years, however, in 2020 exports registered a 13.0% decrease in fourth quarter compared to the same quarter in 2019 (Chart 10).

Chart 10: Quarterly imports and exports from 2000 to 2020

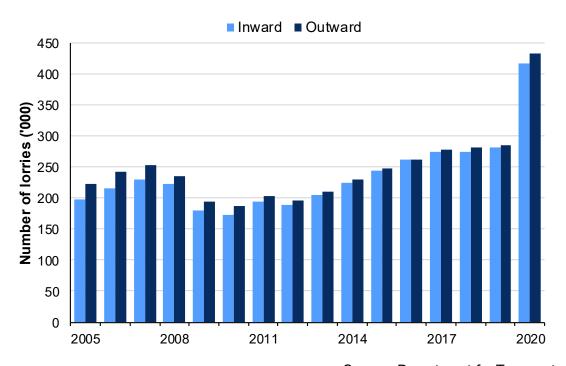


Source: Welsh Government analysis of Department for Transport data

Republic of Ireland freight movements through Welsh ports

• In 2020, 851,000 Lorries and unaccompanied trailers passed through Welsh ports to and from Ireland, representing a 50.0% increase compared to year before (Chart 11). Around half came from Ireland and half travelled to Ireland. 81.6% of this traffic went through Holyhead (see StatsWales);

Chart 11: Lorries and Trailers to Irish Republic through Welsh ports, 2005 to 2020



Source: Department for Transport

Welsh ports act as a gateway between the Republic of Ireland and the rest of Europe. More than 80.0% (0.5 Mt) of goods carried on Irish registered HGVs between the Republic of Ireland and Europe passed through Wales. 72.5% of this traffic passed through the port of Holyhead in North Wales'. (See <u>StatsWales</u>).

- Of goods carried on Irish registered HGVs from the Republic of Ireland to the continent in 2020, 82.1 % went through Wales (<u>Chart 12</u>).
- Of goods carried on Irish registered HGVs to Ireland from the continent, 90.9% went through Wales. The majority of this HGV traffic between Wales and the Republic of Ireland passed through Holyhead².

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² Source: Central Statistical Office Ireland

Chart 12: Proportion of goods carried from/to Republic of Ireland, 2020

From the Republic of Ireland



To the Republic of Ireland



Source: Welsh Governemnnt analysis of Central Statistical Office Ireland

Welsh Ports compared with the rest of the United Kingdom Ports

For the UK as a whole, freight tonnage fell by 9% in 2020 compared to 2019. All countries in the United Kingdom in 2020 registered decreases in sea freight tonnage compared to the previous year. Scotland registered the highest decrease in sea freight (12.0%), Wales fell by 3.2% and Northern Ireland recorded the lowest decrease (1.0%).

Total freight tonnage through UK ports in 2020 was 439.0 Mt (Table 1), a 9.0% decrease on 2019, and 17.5% below the 2005 level. Compared with 2019, inwards tonnage decreased by 10.6% to 279.0 Mt and outwards tonnage decreased by 6.2% to 160.0 Mt.

In 2020, the 2.0% decrease in inward traffic at welsh ports was the lowest recorded decrease compared to other nations in Great Britain (GB).

Looking at individual ports:

- London Port was the UK's leading port in 2020 in terms of freight tonnage, handling 47.4 Mt (10.8% of UK tonnage), a decrease of 12.4% compared to 2019.
- Grimsby & Immingham came second with 46.0 Mt (10.4% of UK tonnage),
- Milford Haven port in Wales came in 3rd position, handling 34.0 Mt of freight (7.7% of UK tonnage).

Table 1: All port traffic, inwards and outwards, by UK country, 2019 to 2020

	Mil	Per cent	
	2019	2020	% change 2019 to 2020
England			
Inwards	238	209	-11.9% ▼
Outwards	98	92	-5.7% ▼
All	335	302	-10.1% ▼
Wales	0	0	
Inwards	37	36	-2.0% ▼
Outwards	16	15	-5.9% ▼
All	53	51	-3.2% ▼
Scotland	0	0	
Inwards	21	17	-17.7% ▼
Outwards	46	42	-8.9% ▼
All	67	59	-11.7% ▼
Northern Ireland	0	0	
Inwards	17	16	-1.9% ▼
Outwards	11	11	0.1% ▲
All	27	27	-1.1% ▼
United Kingdom	0	0	
Inwards	312	279	-10.6% ▼
Outwards	170	160	-6.2% ▼
All	482	439	-9.0% ▼

Source: Welsh Government analysis of Department for Transport data

Statswales

Section 2: Sea Passengers

This section looks at the total number of sea passengers through Welsh ports

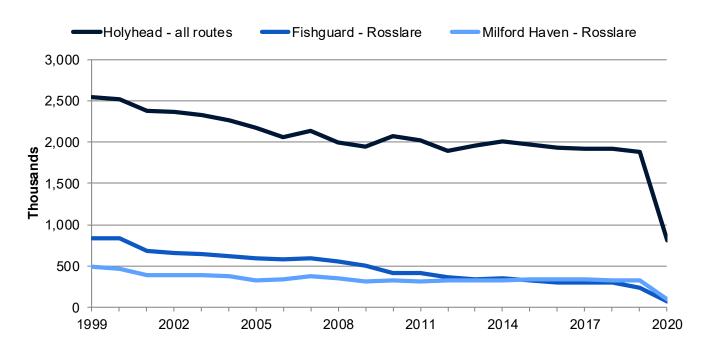
In 2020, a total of 973,000 sea passengers travelled between Wales and Ireland. 808,000 of these passed through Holyhead with the remainder using the ports of Fishguard and Milford Haven (see <u>StatsWales</u>).

- The number of ferry passengers using Welsh ports has remained roughly stable since 2012, before a steep decline in 2020 as a result of travel restrictions related to the COVID-19 pandemic. (Chart 13).
- There were only 259,000 accompanied passenger vehicles in 2020, representing a 62.0% decrease compared to 2019. This was the lowest recorded number of accompanied vehicles since 1981

The main Welsh ports used by passengers are Holyhead (83.0% of passengers), Milford Haven (9.5%) and Fishguard (7.4%). Since 2000, passenger movements between Ireland and Welsh ferry ports have been in decline.

In 2020, sea passenger traffic through Holyhead and Fishguard decreased by 57.2% and 69.3% whilst Milford Haven decreased by 71.6% compared to 2019. This is likely to be the result of Covid-19 travel restrictions in 2020.

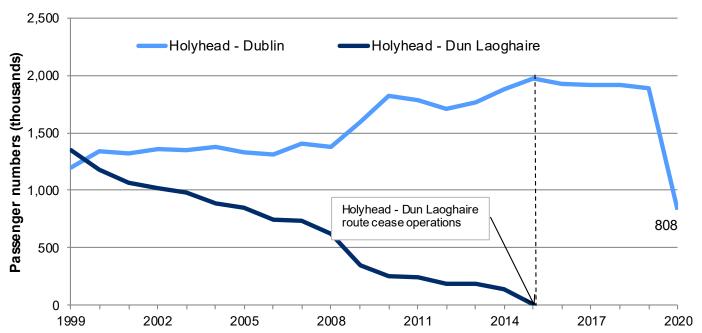
Chart 13: Timeline of Sea Passengers between Wales and Irish Republic Ports, 1999 to 2020



Source: Department for Transport

Holyhead accounts for three quarters of passenger traffic between Wales and the Republic of Ireland. Historically, there were two routes between Holyhead and the Irish Republic (Dublin and Dun Laoghaire). The route to Dun Laoghaire was removed in 2015, following a consistent decline in passengers. Alongside this, the Holyhead to Dublin route saw an overall increase in passenger numbers from just over 1 million in 1998 to just under 1.9 million in 2019, an increase of 79%. The number of passengers decreased from 1.89 million in 2019 to 808,000 (57.2%) in 2020 (Chart 14).

Chart 14: Passenger numbers between Holyhead and the Republic of Ireland



Source: Department for Transport

Key quality information

1 Context

1.1 Related publications

The Department for Transport produces a range of <u>statistics relating to the maritime sector</u> presenting information on domestic waterborne freight, ports, sea passengers, shipping fleets and sea farers. In addition they produce UK port freight <u>interactive dashboard</u> that is useful in understand UK wide sea statistics

Transport Scotland produce a compendium publication titled 'Scottish Transport Statistics' which includes a chapter on Water Transport.

The Northern Ireland Statistics and Research Agency publish an annual statistics bulletin titled 'Northern Ireland Ports Traffic providing statistics on passenger and freight traffic through Northern Ireland ports.

2. Relevance

These figures are compiled by the Department for Transport (DfT) and Central Statistical Office Ireland (CSO Ireland). The UK-level data, together with a full description of the sources and methods used to compile these data can be found on the GOV.UK website. These statistics are used within and outside the Welsh Government to monitor trends in sea transport and as a baseline for further analysis. They are also used by Welsh Government to assess the impact of the UK's departure from the European Union.

3. Accuracy

Freight data

Source of data: Port freight traffic statistics are based on a combination of data reported to the DfT by port authorities and shipping lines or their agents. Prior to 2000 reporting was by port authorities only. The current collection arrangements for port freight traffic statistics were introduced on 1 January 2000 to meet the requirements of the European Commission (EC) Maritime Statistics Directive (Council Directive 95/64/EC on statistical returns in respect of the carriage of goods and passengers by sea, recast as Directive 2009/42/EC).

Coverage: The statistics relate to traffic to and from ports in Wales. UK-level figures do not cover ports in the Isle of Man or the Channel Islands.

Major and minor ports: Ports are classified as either major or minor by DfT on the basis of current and historical trends in cargo volumes. More detailed data are collected for major ports than for the minor ports, and this is reflected in the statistics which can be produced.

Weights: All weights are tonnes gross, including crates and other packaging. The tare weights of containers, road goods vehicles, trailers and other items of transport equipment (i.e. the unloaded weight of the vehicle or equipment itself) are excluded.

Cargo types: Major port traffic is classified by cargo type. Cargo type is defined primarily in terms of the means by which the goods are loaded onto or off the vessel - although for some cargo types

there is some further subdivision into broad commodities, the method of loading takes priority. A table of cargo types is shown below.

Category	Description	Cargo Code
Unitised traffic		
Containers	20 ft freight units	31
	40 ft freight units	32
	Freight units > 20 ft & < 40 ft	33
	Freight units > 40 ft	34
Roll-on/Roll-off (self- propelled)	Road goods vehicles with or without accompanying trailers	51
	Passenger cars, motorcycles and accompanying trailers/caravans	52
	Passenger buses	53
	Import/Export motor vehicles	54
	Live animals on the hoof	56
	Other mobile self-propelled units	59
Roll-on/Roll-off (non self-	Unaccompanied road goods trailers & semi-trailers	61
propelled)	Unaccompanied caravans and other road, agricultural and industrial vehicles	62
	Rail wagons, shipborne port to port trailers, and shipborne barges engaged in goods transport	63
	Other mobile non self-propelled units	69
Non-unitised traffic		
Liquid Bulk	Liquefied gas	11
	Crude oil	12
	Oil products	13
	Other liquid bulk products	19
Dry Bulk	Ores	21
,	Coal	22
	Agricultural products	23
	Other dry bulk	29
Other general cargo	Forestry products	91
	Iron and steel products	92
	Other general cargo & containers < 20 ft	99

Unitised goods: Goods which are lifted on or off the vessel in large (20 foot or longer) shipping containers, or rolled on or off in one of a variety of self-propelled or towed units are said to be unitised cargoes. For these cargo types, the number of units as well as the weight of goods is recorded. Subsets of unitised goods are main freight units consisting of all containers and those roro units which are designed to carry freight (categories 51, 61 and 63 above). The purpose of the main freight unit classification is that it excludes those ro-ro units which are not freight carrying – i.e. passenger vehicles, trade vehicles, and other specialised vehicles and trailers.

Geographical classification of traffic: UK port traffic is classified geographically according to where the goods were last loaded or next unloaded at the other end of the sea journey. All traffic is either domestic or foreign.

Sea passenger data

These figures are compiled by the Department for Transport (DfT). UK-level data, together with a full description of the sources and methods used to compile these data can be found on the GOV.UK website.

Source of data: International ferry passenger statistics are collected monthly from ferry operators by DfT. They include drivers of lorries, coaches and other vehicles but exclude passengers on purely domestic routes.

Ship arrival statistics

They are compiled by the Department for Transport (DfT) and a link to the UK-level data, together with a full description of the sources and methods used to compile these data can be found on the GOV.UK website.

Source of data: The primary source used was commercially obtained vessel movement data from Lloyds List Intelligence (LLI) which is now merged with other information on ship movements obtained by DfT through the system described above for all cargo or passenger carrying movements at major ports and the sea passenger survey. The three data sources are merged at the level of individual vessels calling at each port. The maximum number of calls from any of the three sources is taken as the final estimate.

Coverage and quality: The data are considered a reasonably accurate estimate of the number of commercial shipping movements at UK ports, but are not necessarily exact, and the coverage of certain vessel or traffic types may be variable at the margins. Ship arrival data are not classified as National Statistics. The following table shows the classification of ships types and the ships arrival that are not covered.

Ship type	Trading status	Vessel types included
Tankers	Trading	Oil tanker, oil-chemical tanker, chemical tanker, liquid gas tanker, other tanker
Ro-Ro vessels	Trading	Ro-Ro passenger, Ro-Ro containers, Ro-Ro other cargo
Fully cellular container vessels	Trading	Container (fully cellular)
Other dry cargo vessels	Trading	Bulk carrier, bulk-oil carrier, refrigerated cargo, specialised carrier, general cargo, general cargo-passenger
Passenger*	Trading	Passenger, cruise
Other vessels*	Non-trading	Offshore supply, dredging, bunkering tanker
Not included: Work boats which are unlikely to be carrying cargoes	Non-trading	Fish catching, other fishing, offshore (except supply), tugs or towing/pushing craft, offshore vessels other than supply ships, such as drilling vessels, pilot vessels, research ships, fishing boats, military vessels, research, other work vessels, non-seagoing ships, non-merchant ships, non-propelled vessels, non-ship structures, vessels of unknown or unrecorded type

4. Timeliness and punctuality

This bulletin reports on Sea Transport in Wales during 2020. Information covers traffic to and from ports in Wales. UK-level figures do not cover ports in the Isle of Man or the Channel Islands. This bulletin is based on annual data which is published by the Department for Transport.

Related publications are available from the Statistics and Research website.

Sea Transport statistics for Wales are available on the StatsWales website.

5. Accessibility and clarity

This statistical bulletin is pre-announced and then published on the Statistics & Research website and is accompanied by tables on our StatsWales website.

6. Comparability and coherence

The Department for Transport produces a range of <u>statistics relating to the maritime sector</u> presenting information on domestic waterborne freight, ports, sea passengers, shipping fleets and sea farers.

ONS publish weekly shipping indicators as part of their weekly Economic Activity and social change in the, real-time indicators.

National Statistics status

The <u>United Kingdom Statistics Authority</u> has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Statistics.

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value, and it is our responsibility to maintain compliance with these standards.

All official statistics should comply with all aspects of the Code of Practice for Statistics. They are awarded National Statistics status following an assessment by the UK Statistics Authority's regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate. The designation of these statistics as National Statistics was confirmed in July 2013 following a <u>full assessment against the Code of Practice</u>.

Since the latest review by the Office for Statistics Regulation, we have continued to comply with the Code of Practice for Statistics, and have made the following improvements:

Improved visuals by de-cluttering and standardising charts and tables

It is Welsh Government's responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Authority promptly. National Statistics status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.

Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators ("national indicators") that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016 and this release does not include any of the national indicators.

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the <u>Well-being of Wales report</u>.

Further information on the Well-being of Future Generations (Wales) Act 2015.

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

Further details

The document is available at: Sea Transport

Next update

October 2022 (provisional)

We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided to: stats.transport@gov.wales

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