

Statistical Bulletin





Sea transport, 2021

30 November 2022 SB 32/2022

January 2021 marked the formal departure of the UK from the EU Single Market and Customs Union, while some ongoing coronavirus (COVID-19) pandemic restrictions may have also had an impact on sea transport in that year. Please see page 2 for more information.

Key points



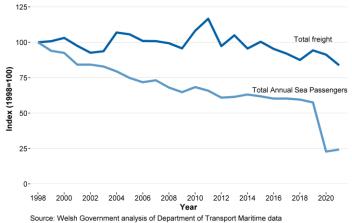
In 2021, total freight tonnage at Welsh ports decreased by 8.2% over the year to 47.0 million tonnes (Mt).

 Of the total freight tonnage at major ports in Wales, 87.2% was international traffic with just over three quarters (76.8%) of this international traffic being imports.

Welsh ports act as a gateway between the Republic of Ireland and the rest of Europe, though HGV movements declined in 2021.

 33.1% (0.23Mt) of goods carried on Irish registered heavy goods vehicles (HGVs) between the Republic of Ireland and Europe passed through Wales, compared with 80.0% (0.5Mt) in 2020.

Chart 1: Indices for Welsh ports' sea freight and passengers, 1998 - 2021



 In 2021, sea passenger traffic increased by 6.1% compared to 2020 following a decrease of 60.3% between 2019 and 2020 during the early stages of the coronavirus (COVID-19) pandemic.

About this bulletin

This annual statistical bulletin sets out information about ports in Wales for 2021. 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

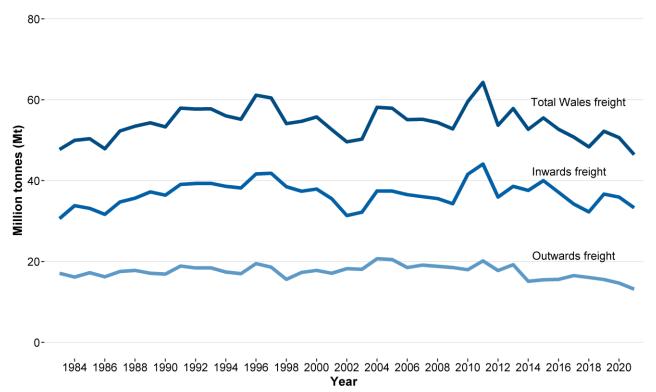
These statistics relate to the 2021 calendar year. Some coronavirus (COVID-19) restrictions were still in place for part of this period and may have impacted the figures presented in this release.

In addition, January 2021 marked the formal departure of the UK from the EU Single Market and Customs Union, which will have impacted movement of goods and passengers through Welsh ports.

Section 1: Sea Freight

This section looks at domestic and international freight traffic by type of freight and movement between regions. Total freight tonnage through Welsh ports in 2021 was 47 million tonnes (Mt) (Chart 2) this is a decrease of 8.2% compared to 2020. Total freight tonnage through Welsh ports has been gradually falling over the last 12 years.

Chart 2: Freight through Welsh ports, 1982 to 2021



Source: Welsh Government analysis of Department of Transport Maritime data

Of the 47.0Mt of freight through Welsh ports, 33.6Mt were goods inwards and 13.4Mt were goods outwards. Inwards total freight represented 71.7% of all freight by sea for Wales in 2021. The remaining was Outward freight (28.6%).

Freight through Welsh ports accounted for 10.6% of the total tonnage through UK ports in 2021.

The largest components of freight through Welsh major ports in 2021 were:

- Oil products, with total volume of 15.7Mt, of which nearly 8.8Mt were goods outwards.
 3.2Mt were sent to destinations elsewhere in the UK and 5.6Mt were exported to the rest of the world.
- Liquefied gas, with total volume of 7.5Mt, the majority (98.9%) being imported from the rest of the world.
- Crude oil, with total volume of 7.1Mt, most of which (86.0%) were imported from the rest of the world.

The main ports in Wales

Major ports in Wales handled a total of 46.4Mt of freight cargo (98.7% of total Welsh sea freight) in 2021. This represents an 8.2% decrease in sea freight through major ports compared to 2020.

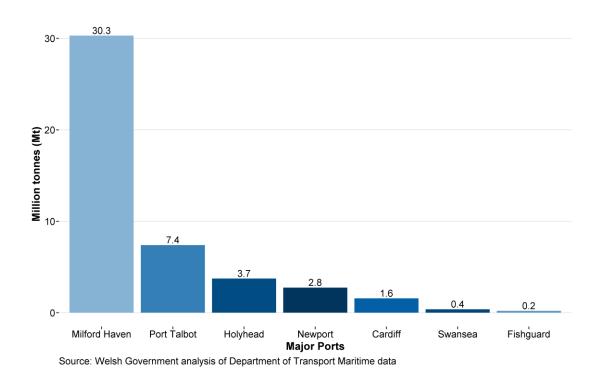
Three of the main ports in Wales meet specialised shipping needs (Chart 3 and Chart 4) (Map):

- **Milford Haven**: Handled 30.3Mt of freight in 2021 mainly crude oil, oil products and liquefied natural gas. These three products accounted for 96.5% of all cargo at this port in 2021 and are likely related to the oil refinery in Pembroke Dock.
- Port Talbot: Handled 7.4Mt of freight in 2021 mainly iron ore, coal and 'Other dry bulk' mostly for the adjacent steelworks. These three products accounted for 99.9% of all cargo at this port in 2021
- Holyhead: Is the main port for freight and sea passenger transport with the Republic of Ireland. It handled 3.8Mt of freight in 2021 - mainly Road goods vehicles and trailers, Unaccompanied road goods trailers and unaccompanied caravans, agricultural and industrial vehicles. These three products accounted for 100% of all Cargo at this port in 2021.

In 2021, Milford Haven was the largest port in Wales and the fourth largest port in the UK by volume of freight, predominantly through oil and gas. Freight tonnage at Milford Haven accounts for two thirds of all Welsh port freight. It handled 30.3Mt of freight in 2021, which was 6.8% of the UK total. When compared with 2020, Milford Haven freight traffic decreased by 3.3Mt (9.7%) (Chart 3), (see <u>StatsWales</u>). Holyhead Port registered the largest decrease 239Mt (35.9%) over the same period.

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

Chart 3: Sea freight through major Welsh ports, 2021



Map: Major Sea port locations in Wales



Chart 4 shows the composition of different sea freight at Welsh major Sea ports during 2021. Oil products followed by liquefied gas dominate the volume of sea freight. In Chart 4, 'Other' includes the following cargo categories: Road goods vehicles with or without accompanying trailers, Passenger cars, motorcycles and accompanying trailers/caravans, Passenger buses, Import/Export motor vehicles and Other mobile self-propelled units

12%

Cargo

Crude oil
Liquefied gas
Oil products
Ores
Other (excludes 'Other dry bulk')

Chart 4: Top 5 cargo categories of sea freight via Welsh major ports, 2021

Source: Welsh Government analysis of Department of Transport Maritime data

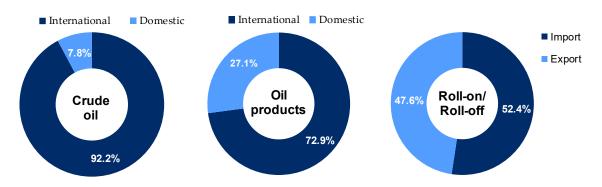
Domestic and International freight by cargo

This section covers the movement of sea cargo tonnage via Welsh ports, with domestic traffic referring to coastwise movement (between Welsh ports) and international traffic referring to the movement of cargo to and from overseas destinations (<u>Chart 5</u>). In 2021, 87.2% of traffic at major ports in Wales was international traffic with 76.8% of this traffic being imports.

Comparing domestic and international traffic:

- 92.2% of crude oil traffic through the ports of Wales was international traffic (86.0% imports,
 6.2% exports). The remaining 7.8% was domestic traffic, consisting entirely of inwards domestic traffic.
- 72.9% of oil products traffic was international traffic, (35.5% exports and 37.4% imports). The remaining 27.1% of oil products was domestic traffic (23.7% inwards and 76.3% outwards).
- Roll-on/roll-off (RoRo) traffic in 2021 consisted entirely of international traffic with a close split between imports (52.4%) and exports (47.6%) cargo.

Chart 5: Domestic and International Traffic at major Welsh ports, 2021



Source: Welsh Government analysis of Department for Transport data

When looking at imports and exports at major Welsh ports:

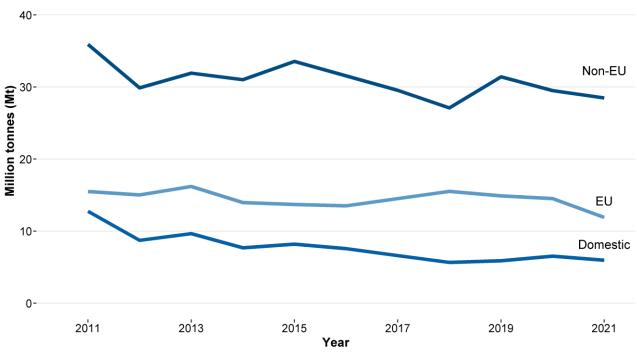
- Imports were higher than exports, with 31.1Mt and 9.4Mt respectively
- The majority of international traffic was either liquid bulk (25.6Mt) or dry bulk (8.2Mt). Liquid bulk includes products such as liquefied gas, crude oil and oil products. Dry bulk includes coal, ores and agricultural products.
- Liquid bulk imports decreased by 9.8% in 2021, whilst liquid bulk exports fell by 4.9% compared with 2020.
- Dry bulk imports increased by 12.3% in 2021, whilst dry bulk exports fell by 22.1% compared with 2020.
- Roll-on/Roll-off imports decreased by 30.7% in 2021, whilst Roll-on/Roll-off exports fell by 35.5% compared with 2020.

Sea freight by region

Sea freight is viewed by regional origin and destination that includes Domestic Traffic, European Union (EU) traffic and non-European Union (non-EU) traffic. The largest volume of freight movements are between Welsh ports and the non-EU region (Chart 6). In 2021, non-EU freight from Welsh major ports accounted for 61.4% of all volumes, 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 non-EU or domestic exports

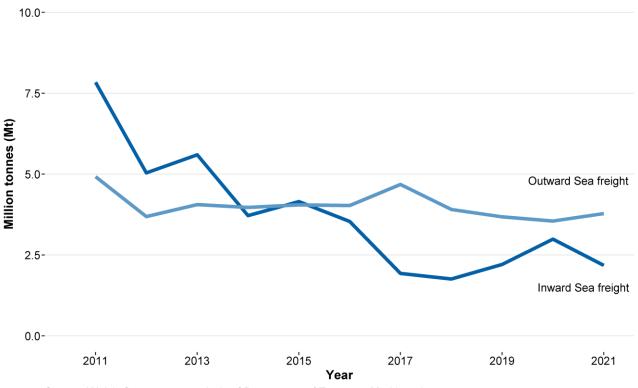
Chart 6: Sea Freight by region via Welsh ports, 2011 to 2021



Domestic Traffic

This section covers Welsh sea coastwise freight movements, i.e., freight shipped between United Kingdom (UK) ports. Since 2015, outward sea freight leaving major Welsh ports has surpassed inward traffic (Chart 7). In 2021, outward domestic sea freight from major Welsh ports increased by 6.5% compared to 2020, whilst inwards domestic sea freight decreased by 27.1% over the same period.

Chart 7: Domestic freight movements between major Welsh ports and UK ports, 2011 to 2021



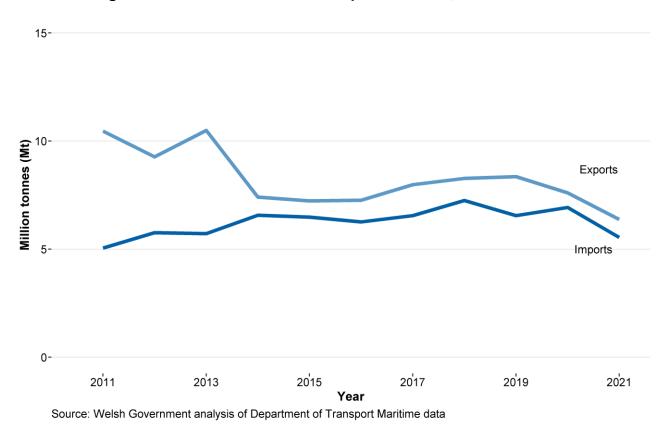
Source: Welsh Government analysis of Department of Transport Maritime data

European Union Traffic

This section covers sea freight movement between Wales and countries from the EU and looks at total sea import and export volumes from major ports.

In 2021, the volume of sea freight exports to the EU was 6.4Mt, a decrease of 15.9% compared to 2020 and a decrease of (23.6%) compared to 2019. This decrease coincides with the formal departure of the UK from the EU Single Market and Customs Union in January 2021. Since the EU Exit referendum, there has been an increase in shipping routes directly between Europe and the island of Ireland, which has led to a decrease in the number of vehicles using the UK as a landbridge between Dover and Ireland. 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).

Chart 8: Freight movements between Welsh ports and EU, 2011 to 2021

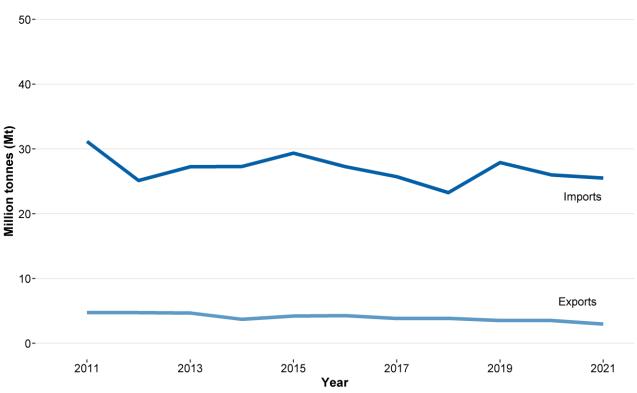


In 2021, there was a 20.1% decrease in total import volumes from the EU. Import volumes from the EU generally increased between 2012 until 2018.

Non-European Union Traffic

When considering tonnage, most sea trade with non-EU countries is imported into Welsh ports. In 2021 there was a decrease from 2020 in total export volumes to non-EU destinations by 15.6% whilst imports decreased by 1.8% (Chart 9).

Chart 9: Freight movements between Welsh ports and non-EU, 2011 to 2021

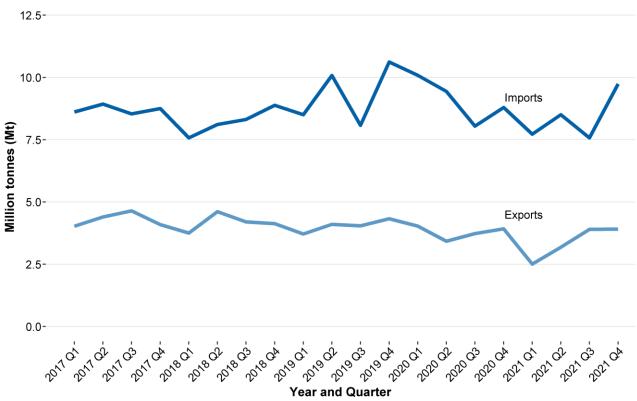


Quarterly Imports and exports

This section looks at quarterly sea freight volume through major ports in Wales. Figures for Wales largely reflect activity at Milford Haven. In 2021, total freight volumes at Milford decreased by 9.7% compared to 2020.

- In 2021, Milford Haven total import volumes increased in the fourth quarter to 6.4Mt, an increase of 23.5% compared to the same quarter in 2020.
- In 2021 export volumes from Milford Haven registered a 10.4% increase in the fourth quarter compared to the same quarter in 2020 (Chart 10).

Chart 10: Quarterly imports and exports from 2017 to 2021



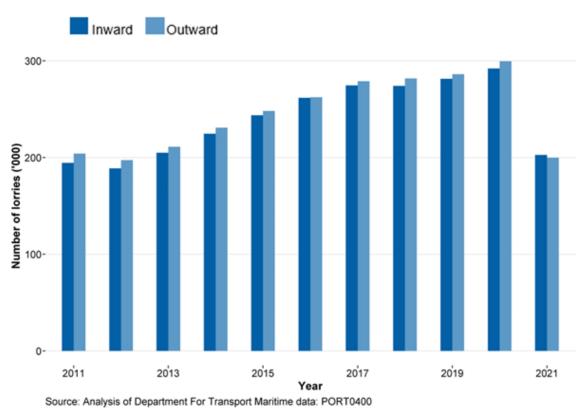
Source: Welsh Government analysis of Department of Transport Maritime data

Republic of Ireland freight movements through Welsh ports

Welsh ports (Holyhead in particular) have historically acted as a gateway between the Republic of Ireland and the rest of Europe, with many hauliers opting for shorter sea routes combined with driving across the UK (landbridge). Current trends indicate a decline in the use of the landbridge since the formal departure of the UK from the EU Single Market and Customs Union in January 2021, combined with increased direct shipping routes between Ireland and continental Europe.

 In 2021, 402,000 lorries and unaccompanied trailers passed through Welsh ports to and from Ireland, representing a 32.0% decrease compared to the year before (Chart 11).
 Around half of lorries and trailers came from Ireland and half travelled to Ireland. 92.6% of this traffic went through Holyhead, (see <u>StatsWales</u>);

Chart 11: Lorries and Trailers to Republic of Ireland through Welsh ports, 2011 to 2021



In 2021, 33.1% (0.23 Mt) of all goods carried on Irish registered HGVs between the Republic of Ireland and Europe passed through Wales, compared to 80.0% (0.5Mt) in 2020. The majority of this traffic passed through the port of Holyhead in North Wales.

- Of goods carried on Irish registered HGVs *from* the Republic of Ireland *to* the continent in 2021, 29.4% went through Wales (Chart 12). This compares to 82.1% in 2020 and 67.2% in 2019.
- Of goods carried on Irish registered HGVs to Republic of Ireland from the continent, 36.5% went through Wales. This represents a 46.3% decrease compared to 2020 levels.

Chart 12: Proportion of goods carried from/to Republic of Ireland, 2021

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 increased by 1.5% in 2021 compared to 2020. Northern Ireland registered the highest increase in sea freight volumes (9.0%), Scotland decreased by 1.5% and Wales recorded the largest decrease (8.2%). (Statswales).

Total freight tonnage through UK ports in 2021 was 445.5Mt, a 1.6% increase on 2020, and 23.8% below the 2005 level. Compared with 2020, inwards tonnage increased by 4.6% to 292.0 Mt and outwards tonnage decreased by 3.6% to 154.0 Mt.

In 2021, Wales recorded a decrease in all port traffic movements (both inward and outward).

Looking at individual ports:

- London Port was the UK's leading port in 2021 in terms of freight tonnage, handling 51.8Mt (11.9% of UK tonnage), an increase of 9.3% compared to 2020.
- Grimsby & Immingham came second with 50.0 Mt (11.5% of UK tonnage).
- Milford Haven port in Wales came in 4th position, handling 30.3 Mt of freight (7.0% of UK tonnage), a 9.7% decrease compared to 2020.

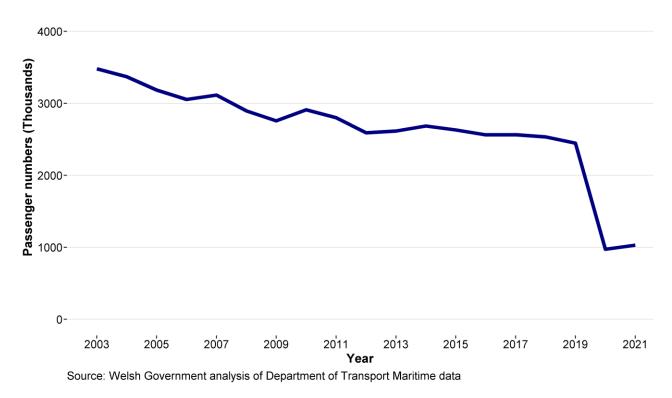
Section 2: Sea Passengers

This section looks at the total number of sea passengers through Welsh ports, this includes passengers travelling by foot, those travelling in vehicles and those travelling as the driver of a goods vehicle.

In 2021, a total of 1.03 million sea passengers travelled between Wales and the Republic of Ireland. 809,000 (78.4%) 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 remained roughly stable since 2012, before a steep decline in 2020 as a result of travel restrictions related to the coronavirus (COVID-19) pandemic. (Chart 14).
- In 2021, the number of ferry passengers increased by 6.1% compared to 2020. (Chart 13).
 There were 327,000 accompanied passenger vehicles in 2021, representing a 26.1% increase compared to 2020.
- The main Welsh ports used by passengers are Holyhead (78.4% of passengers), Milford Haven (11.4%) and Fishguard (10.2%). Since 2000, passenger movements between Republic of Ireland and Welsh ferry ports have been in decline. In 2021, sea passenger traffic through Fishguard increased by 45.3%, Milford Haven increased by 27.4% and Holyhead increased by 0.2%, compared to 2020.

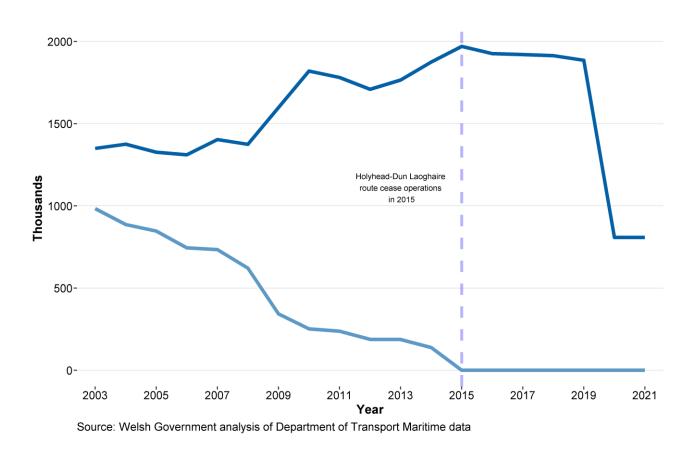
Chart 13: Timeline of Sea Passengers between Wales and Republic of Ireland Ports, 2003 to 2021



In 2021, Holyhead accounted for three quarters of passenger traffic between Wales and the Republic of Ireland. In 2020, the Holyhead to Dublin route saw a significant decrease in passenger

numbers as a result of the coronavirus (COVID-19) pandemic which saw restrictions on how, where and why people could travel. COVID-19 related travel and vaccination restrictions continued to impact travel in 2021, though to a lesser extent and there was a small increase in passenger numbers between 2020 and 2021.

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



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 understanding 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 statistical 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: Data presented in this release are based on the weight of freight traffic. 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- propelled)	Unaccompanied road goods trailers & semi-trailers	61
	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 interntional.

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 2021. 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 <u>Statistics and Research website</u>.

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 <u>StatsWales website</u>.

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 <u>indicators</u>.

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 <u>Code of Practice for Statistics</u>.

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 wellbeing of Wales. The Act puts in place seven wellbeing 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 wellbeing goals, and (b) lay a copy of the national indicators before Senedd Cymru. Under section 10(8) of the Wellbeing of Future Generations Act, where the Welsh Ministers revise the national indicators, they must as soon as reasonably practicable (a) publish the indicators as revised and (b) lay a copy of

them before the Senedd. These national indicators were laid before the Senedd in 2021. The indicators laid on 14 December 2021 replace the set laid on 16 March 2016.

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

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 2023 (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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