



Llywodraeth Cymru
Welsh Government

STATISTICS, DOCUMENT

Trade Survey for Wales (TSW): 2021 (official statistics in development)

Statistics on trade in goods and services from businesses in Wales for 2021.

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Introduction

The Trade Survey for Wales is an online survey of businesses in Wales. It captures trade flows of sales and purchases of goods and services to and from businesses directly based in Wales.

These data are based on a sample survey and are therefore subject to uncertainty. This release presents provisional estimates for 2021. These may be subject to future revisions. We have not previously published Trade Survey for Wales data relating to 2020 due to inconsistencies and quality issues caused by the COVID-19 pandemic. Whilst 2020 data are included in this report with appropriate explanation of the limitations, 2021 comparisons are often drawn against pre-pandemic 2019 data.

As a result of implementing methodological improvements, published historic sales data are also revised in this release and marked with (r). There may be small discrepancies compared with previous purchases estimates, due to wider methodological changes.

Main results

This release presents findings analysed by location, business size and sector. These are 'official statistics in development'. Data limitations are explained in the [data considerations section](#) and separate [quality and methodology information \(QMI\) report](#).

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2021 sales values

- The total value of sales from businesses in Wales was estimated to be £141.3bn.
- 71% (£100.4bn) of sales from businesses in Wales were goods and 29% (£40.9bn) were services.
- 47% of sales went to customers in Wales, 23% to other parts of the UK, 7% to the EU and 8% to Non-EU countries. 15% of sales were unallocated by destination.

2021 purchases values

- The total value of purchases by businesses in Wales was estimated to be £105.0bn.
- 72% (£75.9bn) of purchases by businesses in Wales were goods and 28% (£29.1bn) services.
- 40% of purchases came from customers in Wales, 36% from other parts of the UK, 6% from the EU and 6% from Non-EU. 12% of purchases were unallocated by origin.

Data considerations

The results of the survey are 'official statistics in development' as the method employed is still in development with a view to improving data quality over time through feedback from users and stakeholders. However, the data and analysis are still of value provided users view them in the context of the data quality information provided. More information about data quality can be found in the [QMI report](#) and the definitions of various terms used throughout can be found in

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the [glossary and abbreviations](#). The following data considerations should be taken into account when reviewing the results:

- The results should be treated as provisional due to the likelihood of future revisions from methodological improvements.
- Data relates to a period impacted by the coronavirus (COVID-19) pandemic. As a result, business closures over this period and pandemic restrictions may have affected responses. International trade was also impacted for a prolonged period due to different ongoing government pandemic restrictions in various countries.
- Data relates to the period immediately after the EU Exit; however, the impact of EU Exit may have affected responses and the robustness of the data collected during this period.
- Data are based on a voluntary online survey and the respondent bases for some detailed statistics are relatively small. An overall response rate of 16% was achieved for the TSW 2021 (1,264 responses from a sample of 8,000 businesses).
- The introduction of across-years imputation for sales has meant that variability in the achieved sample across the years of fieldwork has been reduced. However, purchases have not been subject to this methodological change and so the ability to make robust comparisons across the years is limited. Therefore, only very broad high-level comparisons are made in the commentary of this report.
- It should also be noted that the value of unallocated sales in TSW 2020 and 2021 and unallocated purchases in 2020 has increased substantially from previous years. Unallocated values exist where businesses made sales or purchases but were not able to allocate it. More information about unallocated values can be found in the [comparability and coherence section](#). Please see the [QMI report](#) for more detail on the strengths and limitations of TSW.
- In the accompanying data tables, certain data cells have been suppressed where there has been a small number of survey responses.

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- TSW only collects business sales and purchases meaning direct-to-consumer purchases are not captured.
- There may be small discrepancies in figures not summing to totals due to rounding.
- Business size has been based on the size of each business according to UK employment values captured within the [Inter-departmental Business Register \(IDBR\) \(ONS\)](#).
- Certain sectors are excluded from the sample list (most notably the financial services sector) meaning not all businesses across the economy were invited to participate. A detailed list of industry sectors and sector groupings included in the survey are outlined in the [QMI report](#).

Sales

Businesses responding to the TSW were asked to indicate whether they had made sales of goods and/or services in the calendar year 2021 and provide the total value of these sales. They were then asked to break down their sales of goods and/or services by broad destination:

- Sales within Wales
- Sales to the rest of the UK (RUK)
- Sales to the EU
- Sales to Non-EU countries.

If any sales of goods or services were made to the rest of the UK, businesses were asked to identify which UK countries (England, Scotland, and Northern Ireland) they sold to, and the value of sales to each country.

Businesses exporting goods or services outside of the UK were asked to identify the top five destination countries for their exports of goods or services, followed by the approximate value of sales to each.

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Sales overview

The total value of sales from businesses in Wales in 2021 was estimated to be £141.3bn. This is an increase of £19.3bn (16%) compared to pre-pandemic levels (2019) which had a total sales of £122.0 billion (r) (please see [data considerations](#) on comparing results with earlier years).

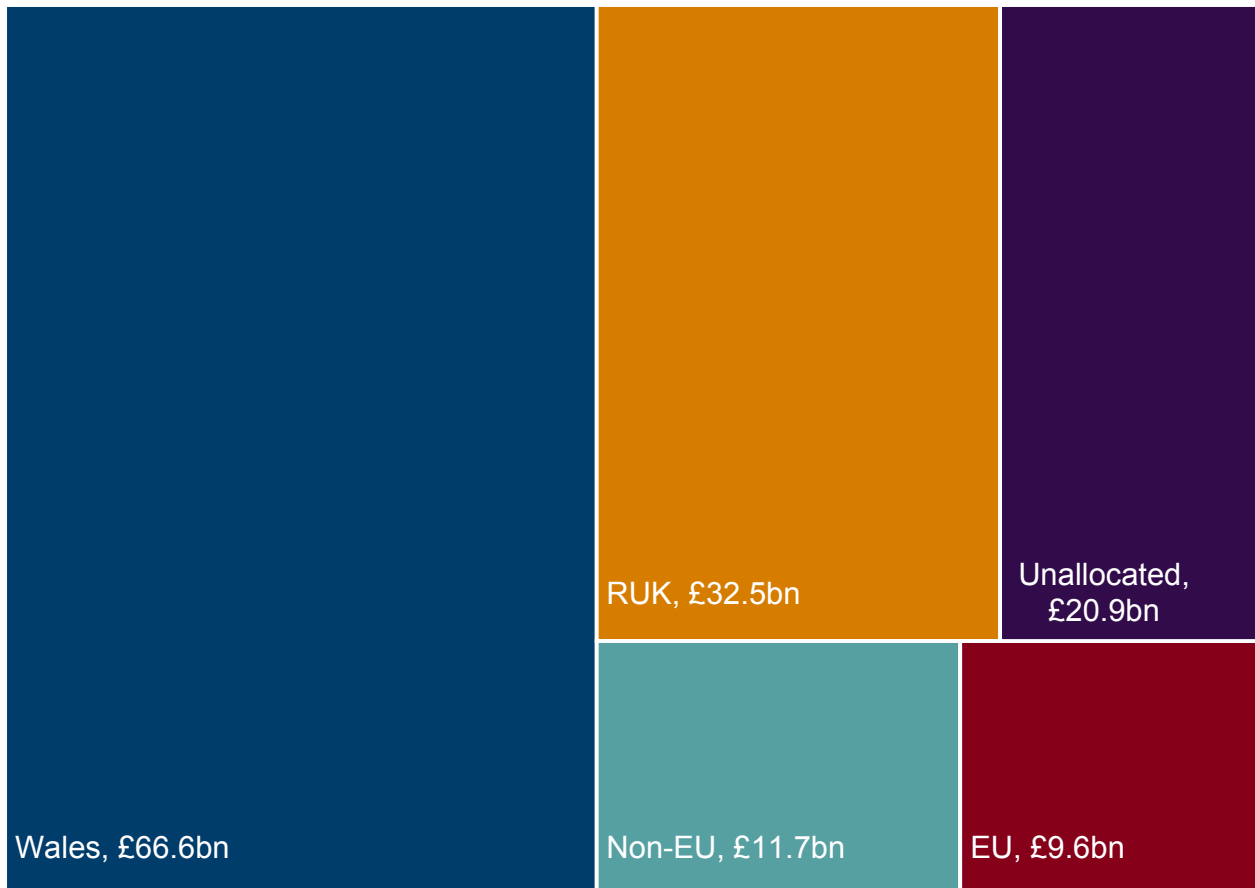
In 2021, goods accounted for 71% (£100.4bn) of sales from businesses in Wales, and services accounted for 29% (£40.9bn). This was broadly similar to 2019, where the split was 69% (£83.9bn) (r) goods, and 31% (£38.1bn) (r) services.

Sales by destination

Figure 1 shows that approximately 47% (£66.6bn) of sales in 2021 were to customers within Wales, an increase of 13% (£7.9bn) compared to 2019. 23% (£32.5bn) of sales in 2021 went to the rest of the UK, 7% (£9.6bn) went to the EU and 8% (£11.7bn) went to Non-EU countries. In 2021, unallocated sales accounted for 15% (£20.9bn), a large increase from £3.9 billion (3%) in 2019.

Unallocated sales values exist where businesses made sales but were not able to allocate them to a destination. More information about unallocated sales can be found in the [comparability and coherence section](#).

Figure 1: Sales by destination (£bn), 2021



Description of Figure 1: A treemap showing businesses within Wales had the most sales to Wales, followed by the rest of the UK.

Source: Trade Survey for Wales 2021, Welsh Government

Sales by destination, by goods and services

The vast majority (92%) of services sales were within the UK, with 68%

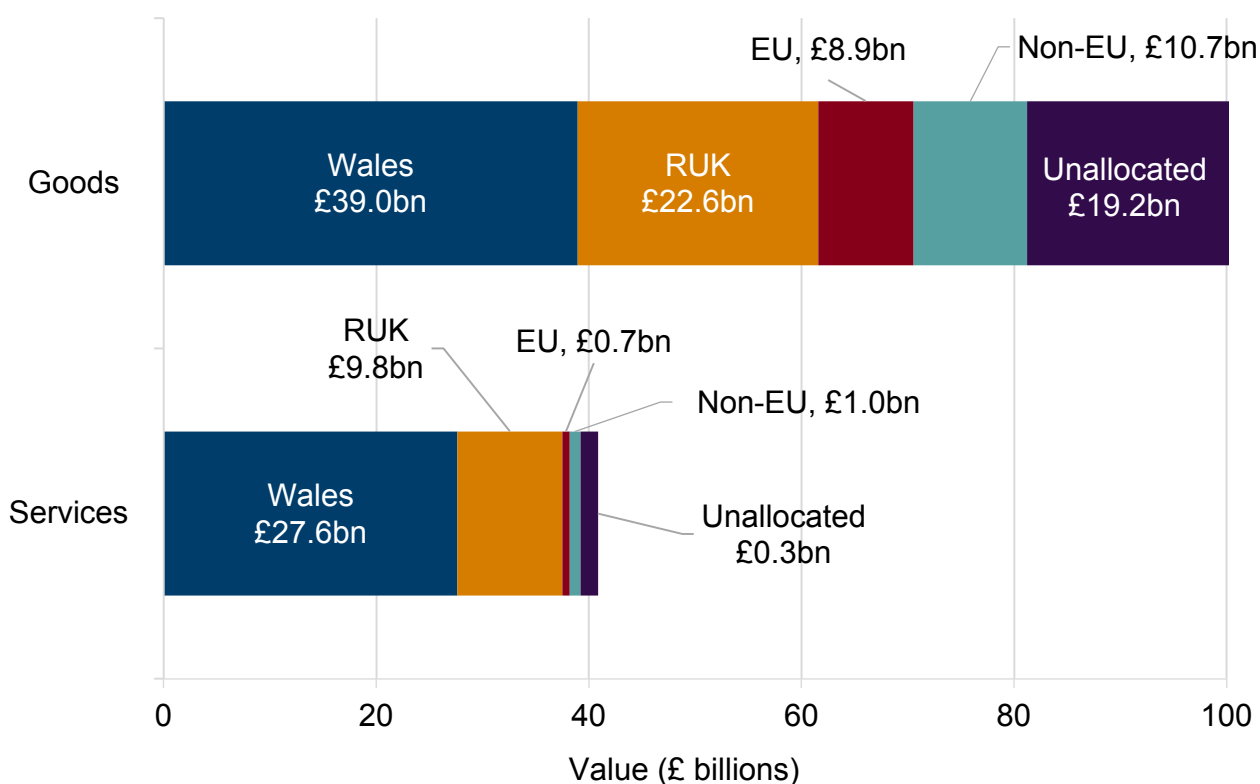
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(£27.6bn) within Wales and 24% (£9.8bn) to other parts of the UK (Figure 2). Goods sales showed a greater split across destinations, although there was a larger proportion of unallocated goods sales 19% (£19.2bn) than unallocated services sales. Almost two-thirds (61%) of goods sales were within the UK; 39% (£39.0bn) were made within Wales and 23% (£22.6bn) to the rest of the UK. One fifth of goods were exported; 9% (£8.9bn) to the EU and 11% (£10.7bn) went to Non-EU countries.

Figure 2: Sales by destination split by goods and services (£bn), 2021



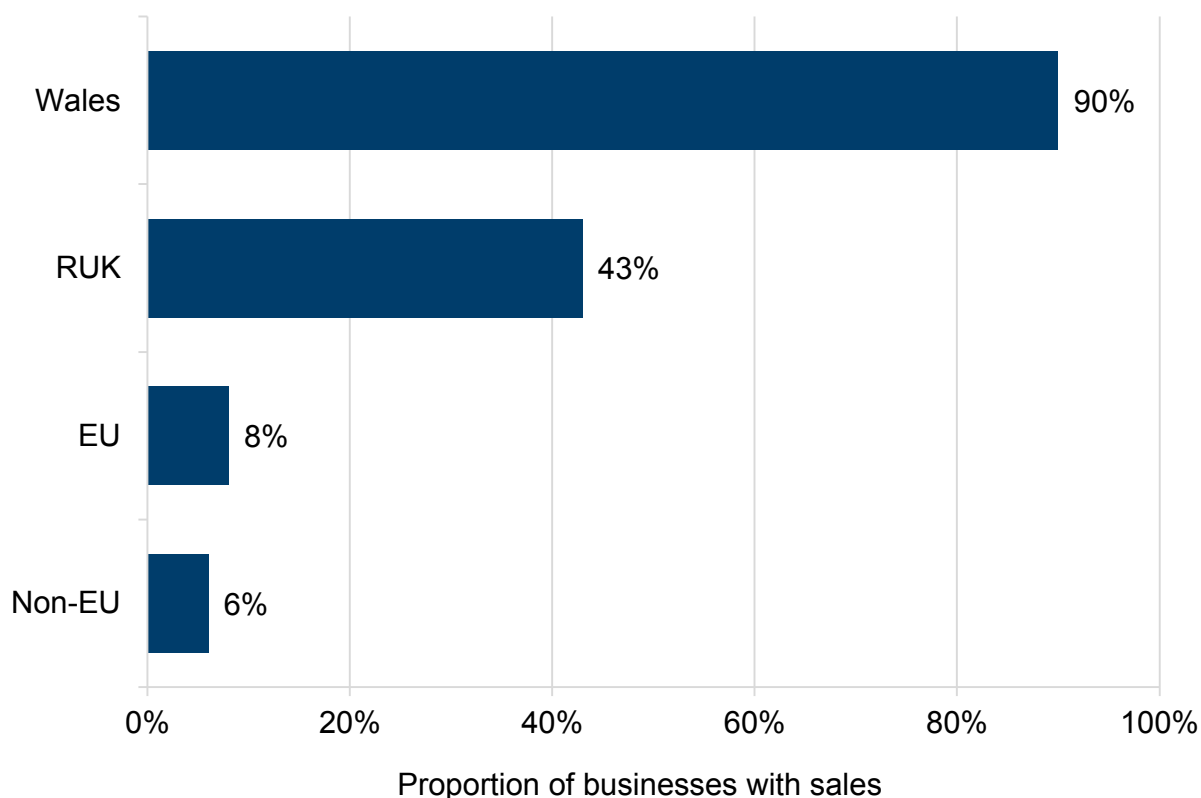
Description of Figure 2: A clustered bar chart showing goods sales was greater than service sales for businesses in Wales, and that goods and services sales were mostly to the UK (including Wales).

Source: Trade Survey for Wales 2021, Welsh Government

Sales by destination, proportion of businesses

Most businesses in Wales (90%) made sales within Wales, with 43% making sales to the rest of the UK. A much lower proportion of businesses exported products internationally, with 8% exporting to the EU and 6% exporting to Non-EU countries (Figure 3).

Figure 3: Proportion of businesses in Wales with sales by destination, 2021



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Description of Figure 3: A bar chart showing most businesses in Wales made sales within Wales (90%), followed by rest of the UK (43%), EU (8%) and then Non-EU (6%).

Source: Trade Survey for Wales 2021, Welsh Government

Sales of (goods and services) by business size

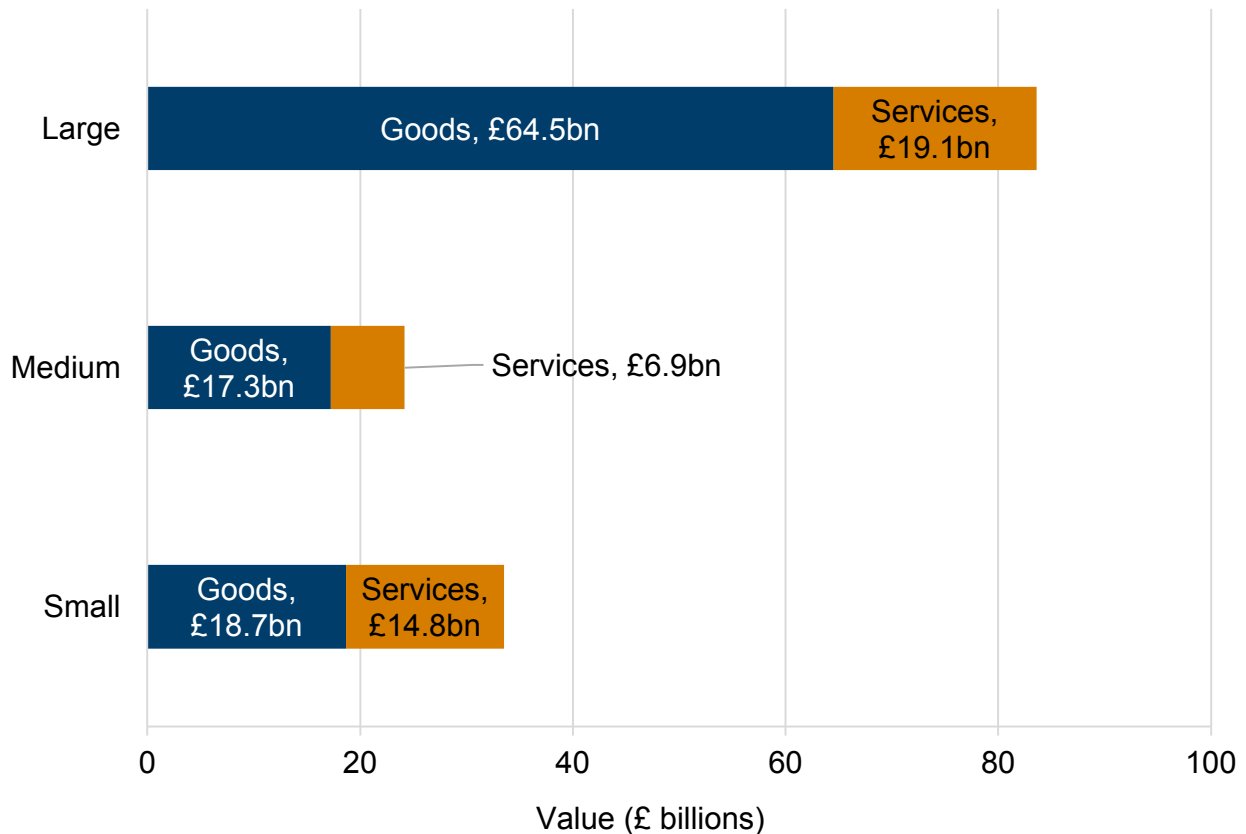
Large, medium and small businesses accounted for 59% (£83.6bn), 17% (£24.2bn) and 24% (£33.6bn) of all sales from businesses in Wales respectively (Figure 4). Most sales from large businesses were goods, at 77% (£64.5bn) of sales value. Sales of goods accounted for 71% (£17.3bn) and 56% (£18.7bn) of medium and small business' sales values respectively.

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Figure 4: Sales by business size split by goods and services (£bn), 2021



Description of Figure 4: A clustered bar chart showing most of the sales were by large businesses and that sales were mostly goods across business sizes.

Source: Trade Survey for Wales 2021, Welsh Government

Sales by business size and destination

Around 70% (£99.1bn) of all sales were made within the UK (Figure 5). Small businesses made 58% (£19.4bn) of their sales within Wales, 33% (£11.0bn) to

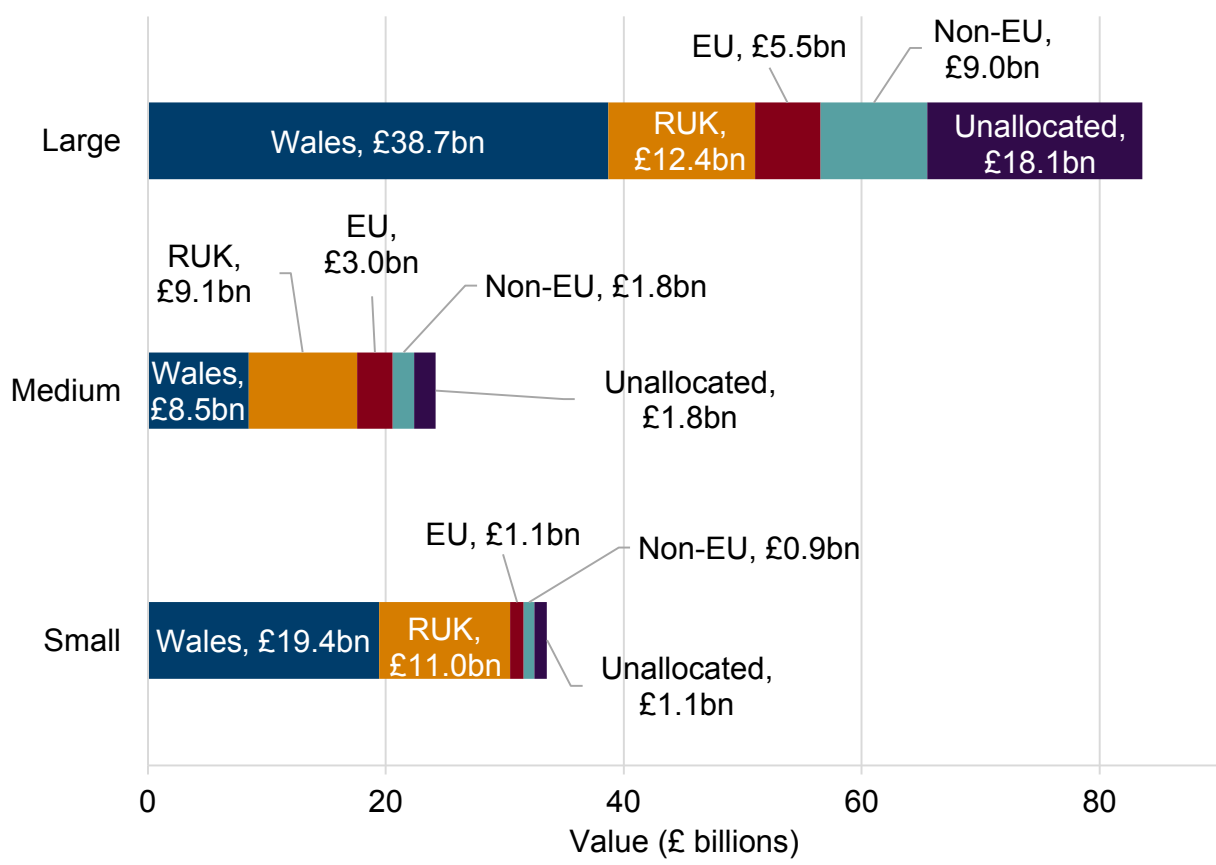
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the rest of the UK and 6% (£2.0bn) internationally. International sales accounted for 17% (£14.5bn) and 20% (£4.8bn) of large and medium business sales respectively. Large businesses had the highest amount of unallocated sales accounting for 22% (£18.1bn) of their total sales value.

Figure 5: Sales by business size and destination (£bn), 2021



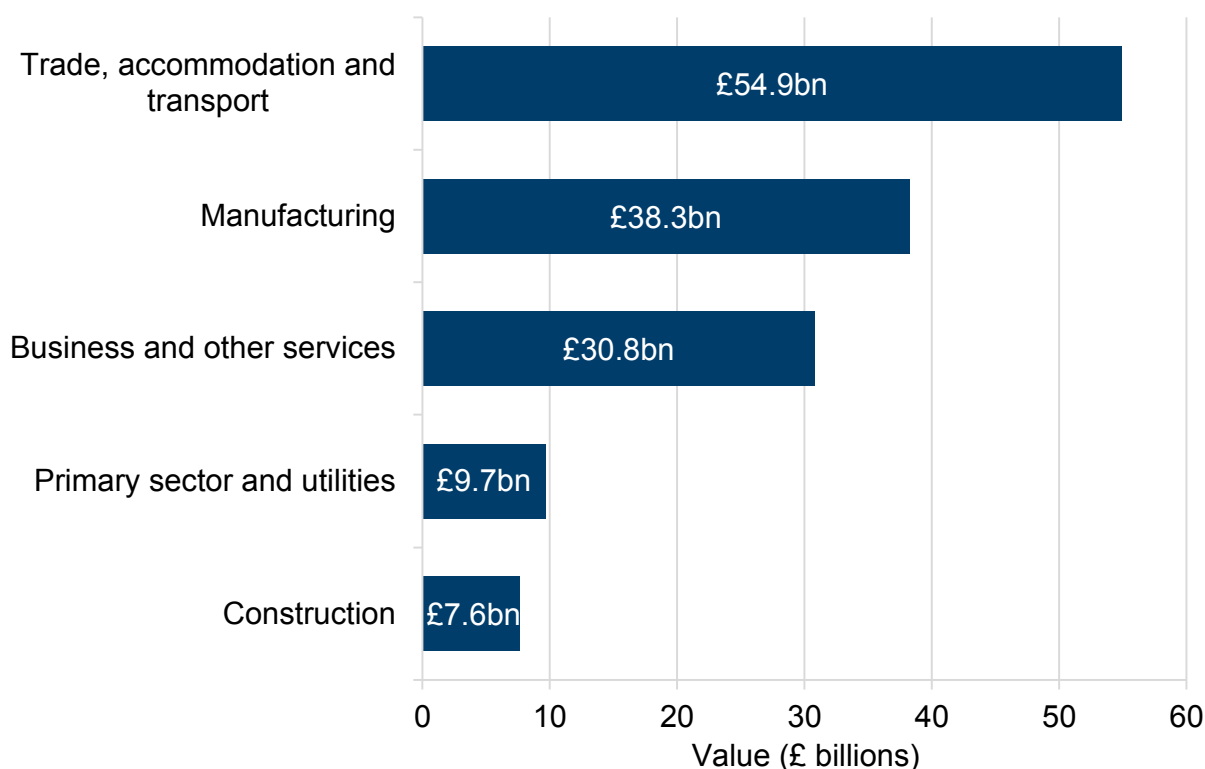
Description of Figure 5: A clustered bar chart showing most of the sales by small and large businesses were within the UK, with medium businesses having sales mostly to the rest of the UK.

Source: Trade Survey for Wales 2021, Welsh Government

Sales by sector ^[footnote 1]

The 'Trade, accommodation and transport' sector had the highest value of overall sales accounting for 39% (£54.9bn) of all sales from businesses in Wales (Figure 6). 'Manufacturing' was the second highest with 27% (£38.3bn), followed by 'Business and other services' with 22% (£30.8bn), 'Primary sector and utilities' with 7% (£9.7bn) and 'Construction' with 5% (£7.6bn).

Figure 6: Sales by sector (£bn), 2021



Description of Figure 6: A bar chart showing the highest value of sales were made by businesses in the 'Trade, accommodation and transport' sector.

Source: Trade Survey for Wales 2021, Welsh Government

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Sales by sector and destination

Around 54% (£29.7bn) of the sales value within the trade accommodation sector was within Wales (Table 1), 11% (£6.2bn) to the rest of the UK and 2% (£1.3bn) internationally along with a high proportion unallocated (32%, £17.8bn). The manufacturing sector had just over half (51%) of its sales to countries within the UK including Wales (£19.6bn) and just under half (47%) of its sales to international countries (£17.9bn). Sales within other sectors were mostly within the UK (Table 1).

Table 1: Sales by sector and destination (£ Millions), 2021 [Note 1]

Business Sector [Note 2]	Wales	RUK	EU	Non-EU	Unallocated	Total
Primary sector and utilities	7,247	1,177	[c]	[c]	1,124	9,669
Construction	5,941	1,432	[c]	[c]	160	7,644
Business and other services	20,072	7,752	694	1,193	1,127	30,838
Manufacturing	3,642	15,959	8,367	9,565	726	38,260
Trade, accommodation and transport	29,706	6,151	434	851	17,793	54,936
Total	66,608	32,471	9,636	11,702	20,929	141,347

Source: Trade survey for Wales 2021, Welsh Government

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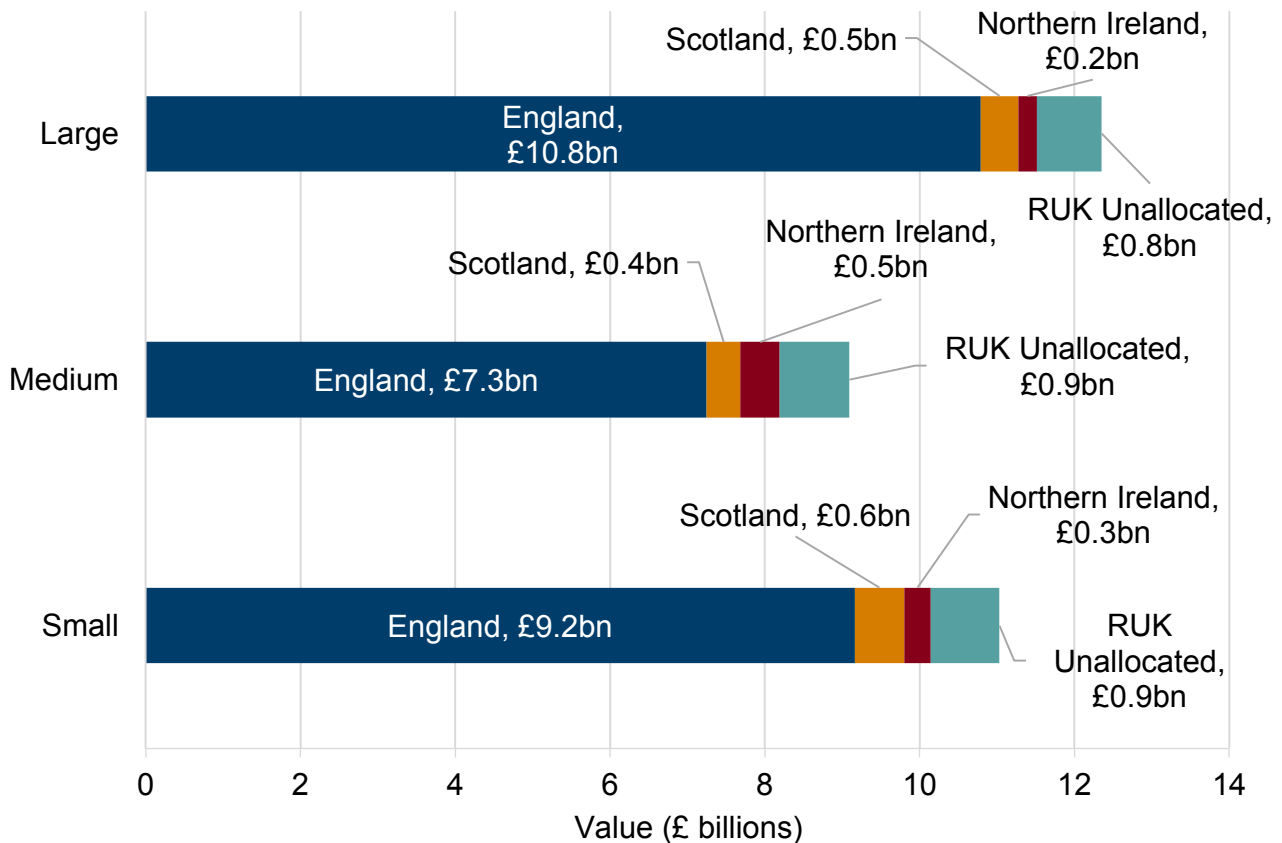
[Note 1] Figures have been suppressed where values are non-disclosive and are denoted by [c].

[Note 2] Businesses making sales in 2021 (1,408), Primary sector and utilities (62), Construction (155), Business and other services (398), Manufacturing (265) and Trade, accommodation and transport (528).

Rest of the UK sales by country

Sales to the rest of the UK accounted for almost a quarter (23%, £32.5bn) of all sales from businesses in Wales. Of these, most of the sales were to England (84%, £27.2bn), followed by Scotland with 5% (£1.6bn) and Northern Ireland with 3% (£1.1bn). A further 8% (£2.6bn) were unallocated. The rest of the UK country split breakdown by business size in general followed the total country split (Figure 7).

Figure 7: Rest of the UK sales by country and business size (£bn), 2021

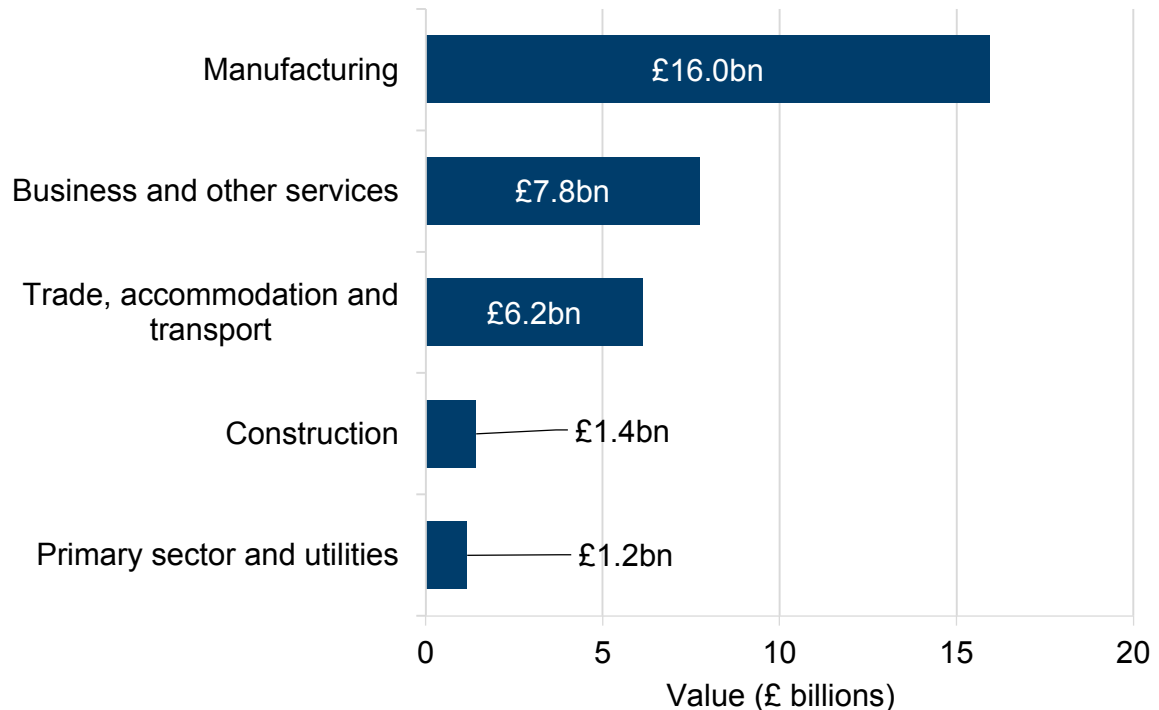


Description of Figure 7: A clustered bar chart showing most rest of the UK sales across all business sizes were to England.

Source: Trade Survey for Wales 2021, Welsh Government

Of the £32.5bn of sales value to rest of the UK, the manufacturing sector made up almost half (49%, £16.0bn) of this sales value (Figure 8). This was followed by Business and other services with 24% (£7.8bn) and the trade, accommodation and transport sector with 19% (£6.2bn).

Figure 8: Sales to the rest of the UK by business sector (£bn), 2021



Description of Figure 8: A bar chart showing the largest category with sales to the rest of the UK was the manufacturing sector

Source: Trade Survey for Wales 2021, Welsh Government

Sales to England made up the majority of the rest of the UK sales (84%). The manufacturing sector had the largest value of sales to the rest of the UK, with England accounting for 87% (£13.8bn), Scotland 5% (£0.8bn) and Northern Ireland 4% (£0.7bn) (Table 2).

Table 2: Sales by sector and the rest of the UK destinations (£ Millions), 2021 [Note 1]

Business Sector [Note 2]	England	Scotland	Northern Ireland	RUK Unallocated	RUK Total
Primary sector and utilities	1,068	[c]	[c]	[c]	1,177
Construction	1,302	[c]	[c]	[c]	1,432
Business and other services	6,253	251	301	947	7,752
Manufacturing	13,811	765	690	694	15,959
Trade, accommodation and transport	4,771	483	91	806	6,151
Total	27,204	1,562	1,086	2,619	32,471

Source: Trade survey for Wales 2021, Welsh Government

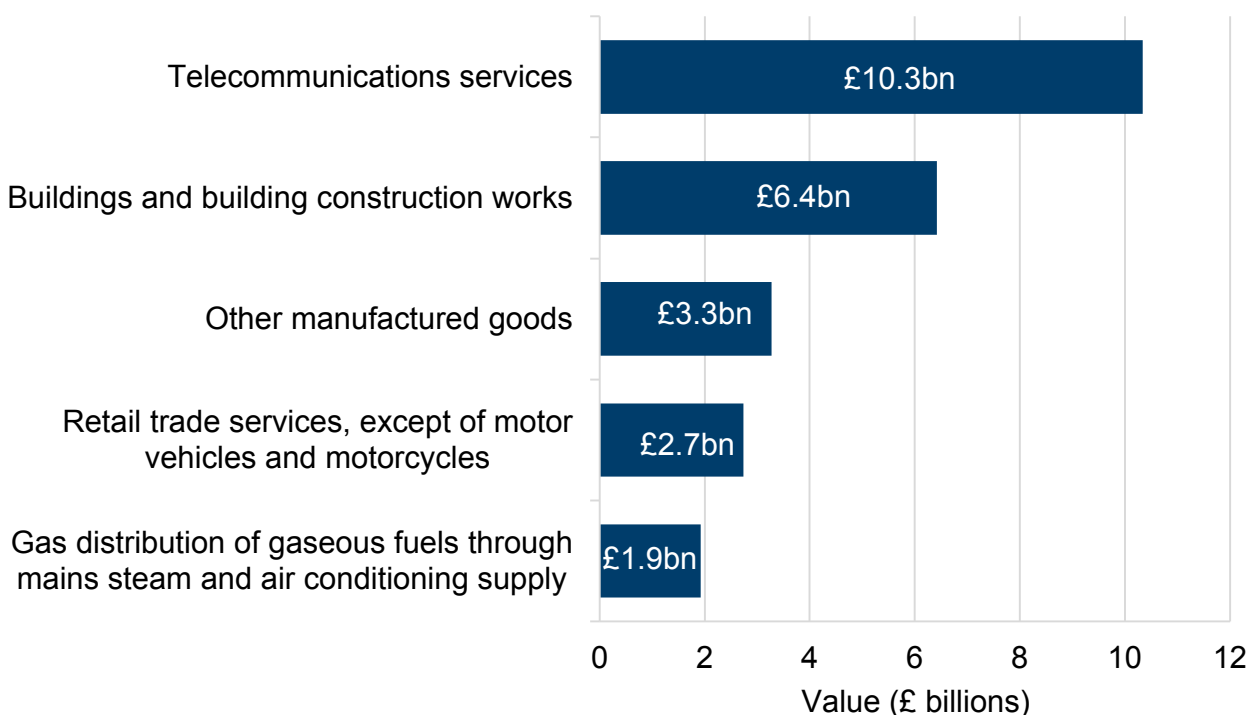
[Note 1] Figures have been suppressed where values are non-disclosive and are denoted by [c].

[Note 2] Businesses making sales in 2021 (1,408), Primary sector and utilities (62), Construction (155), Business and other services (398), Manufacturing (265) and Trade, accommodation and transport (528).

Products sold by businesses in Wales in the UK

Businesses in Wales were asked to select, from a list, the top 5 products they sold within the UK as a whole (including Wales) and their value. ^[footnote 2] From a weighted estimate based on 1,390 responses, 14% (£10.3bn) of sales value was in 'telecommunications services' products (Figure 9). ^[footnote 3] This was followed by 9% (£6.4bn) of sales value in 'Buildings and building construction works' products and 5% (£3.3bn) of sales value in 'Other manufactured goods' products.

Figure 9: Top 5 products sold by businesses within Wales within the UK (£bn), 2021



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Description of Figure 9: A bar chart showing the top commodity sold by businesses in Wales to within the UK (including Wales) was 'Telecommunication services', followed by 'Building and building construction works'.

Source: Trade Survey for Wales 2021, Welsh Government

International exports

In 2021, the value of international exports from Wales was estimated to be £21.3bn, a decrease of £2.8bn (12%) from £24.1bn in 2019, but an increase of £2.5bn (13%) from £18.9bn in 2020. The value of unallocated sales is substantial, accounting for a broadly similar amount to the total value of international exports. This has increased substantially (£17.1bn) from the 2019 estimates.

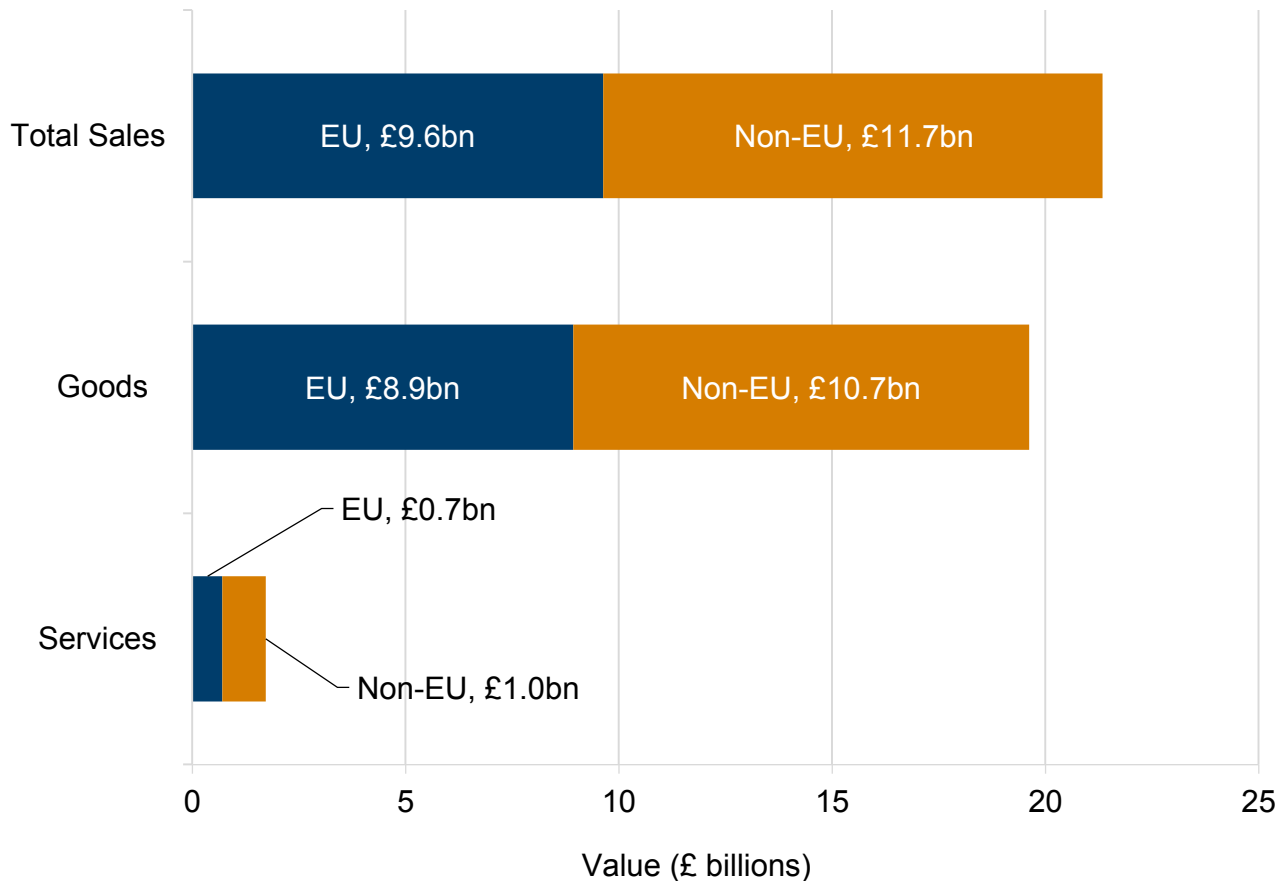
The majority of international exports went to Non-EU countries, accounting for 55% (£11.7bn) with 45% (£9.6bn) of international exports going to the EU (Figure 10). Goods accounted for 92% (£19.6bn) of all allocated international exports.

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Figure 10: International exports by region split by goods and services (£bn), 2021



Description of Figure 10: A clustered bar chart showing that most exports were in goods, and most of the exports for good and services went to Non-EU countries.

Source: Trade Survey for Wales 2021, Welsh Government

Large businesses accounted for just over two-thirds (68%, £14.5bn) of international exports (Figure 11). Medium businesses accounted for 23% (4.8bn) and small businesses 9% (£2.0bn).

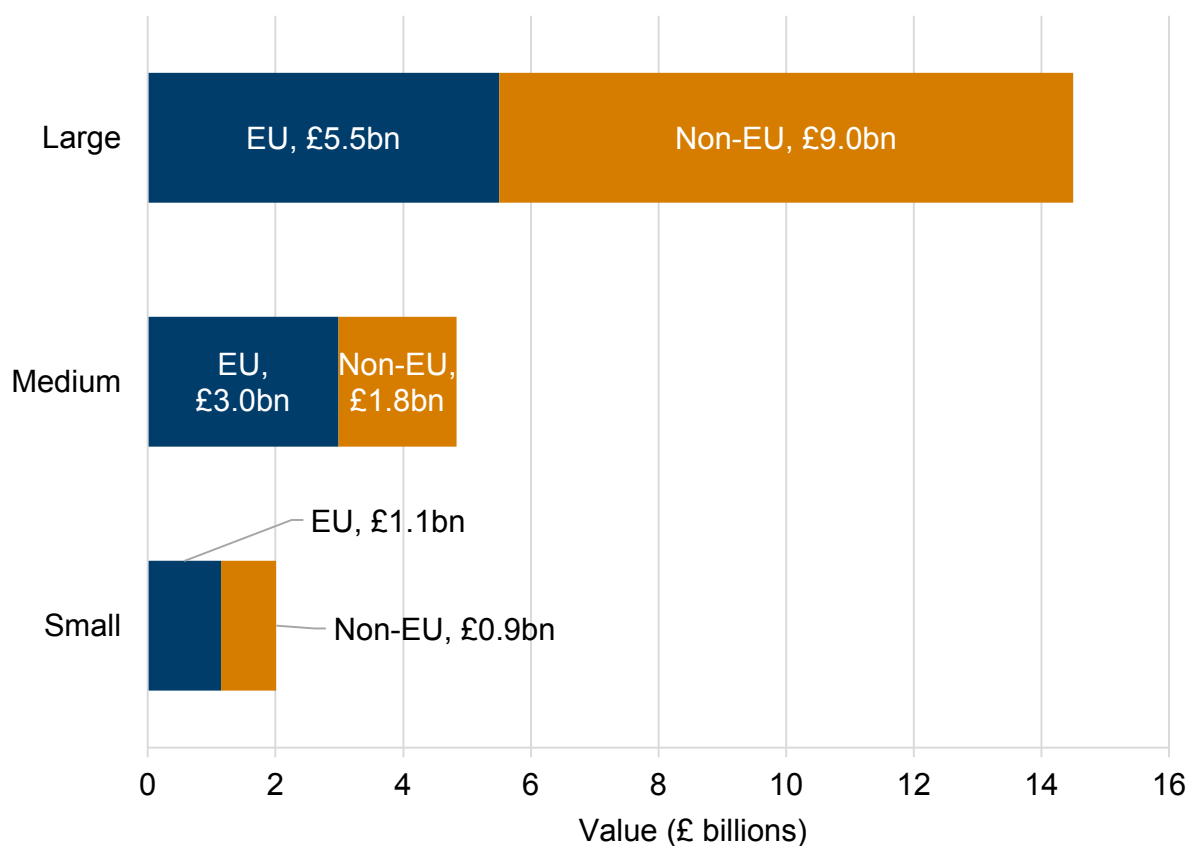
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Most export sales from large businesses (62%) were made to Non-EU customers (£9.0bn). Conversely, most export sales from medium and small businesses were to EU countries; 62% (£3.0bn) and 57% (£1.1bn) respectively (Figure 11).

Figure 11: International exports by business size and destination (£bn), 2021



Description of Figure 11: A clustered bar chart showing that most exports were by large businesses.

Source: Trade Survey for Wales 2021, Welsh Government

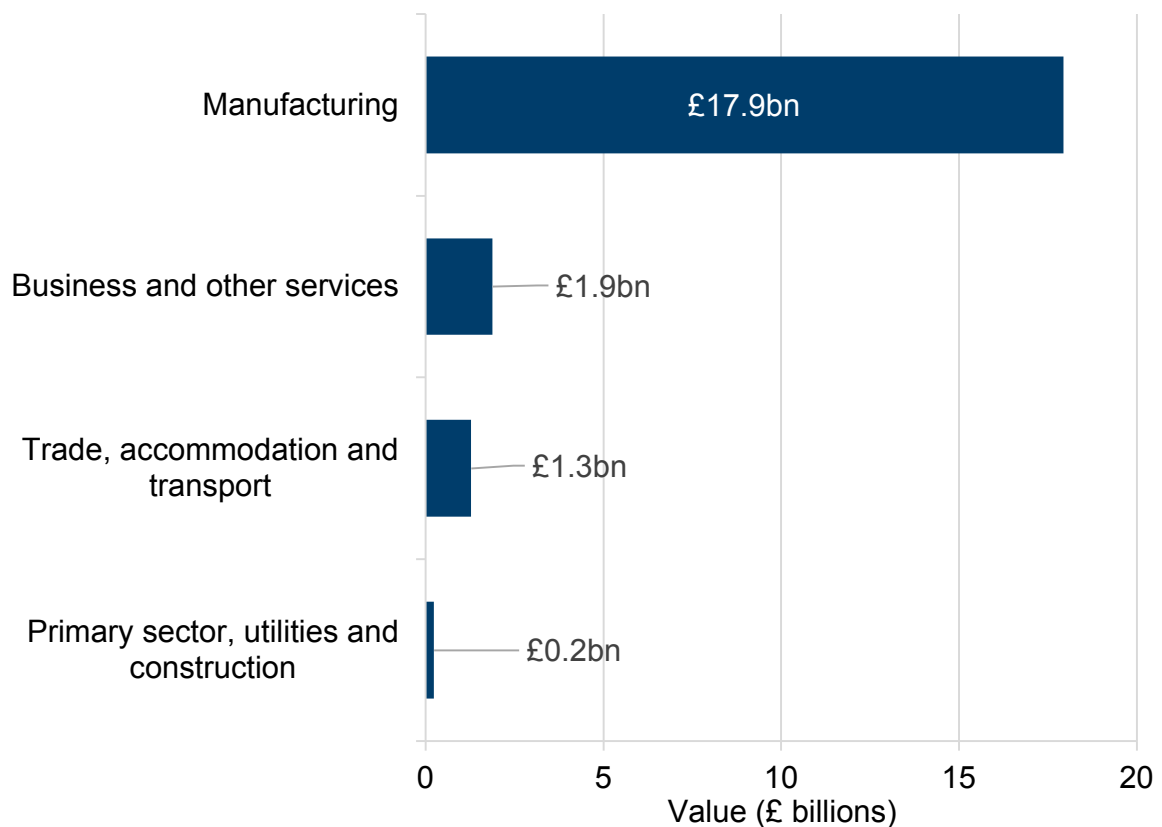
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Figure 12 shows that the manufacturing sector accounted for the majority (84%, £17.9bn) of international exports, followed by the business and other services sector (£1.9bn, 9%).

Figure 12: International exports by business sector (£bn), 2021



Description of Figure 12: A bar chart showing that most exports were from the manufacturing sector.

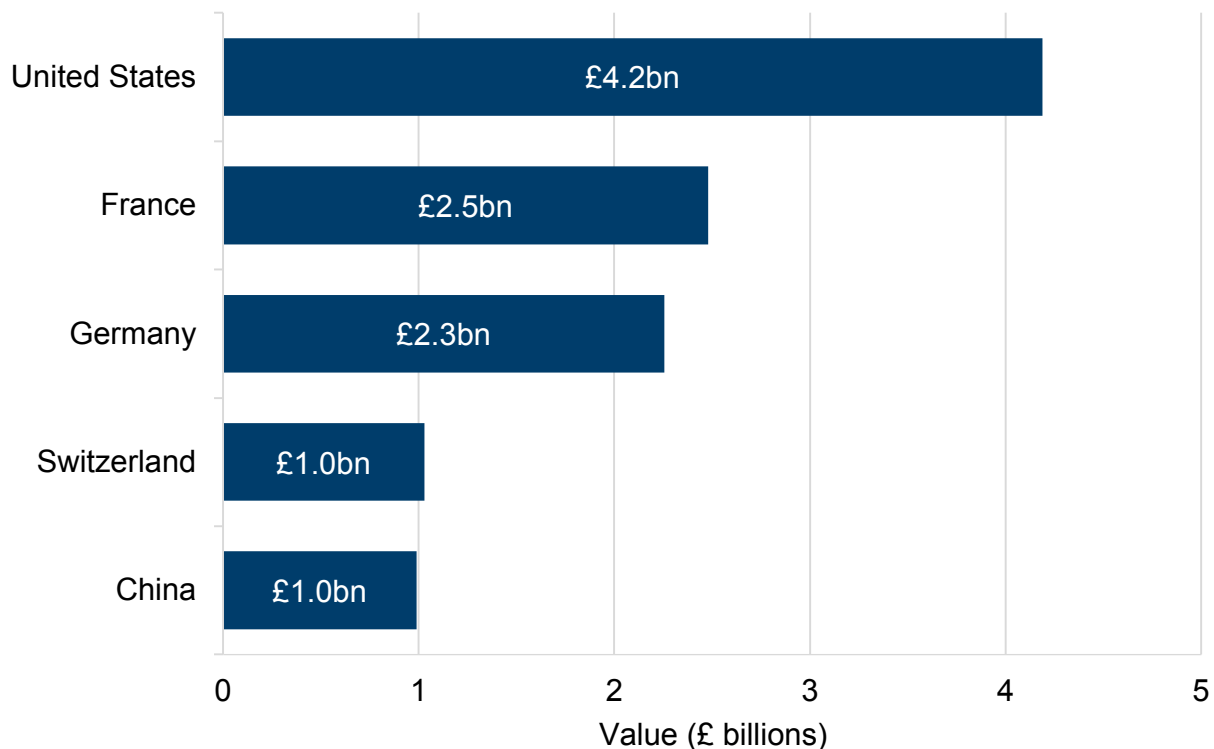
Source: Trade Survey for Wales 2021, Welsh Government

The United States was the top exporting country with £4.2bn worth of exports,

followed by France and Germany exporting £2.5bn and £2.3bn respectively (Figure 13). The value of exports to the top 5 countries accounted for about half (51%, £10.9bn) of the total exports by businesses in Wales.

Businesses were asked to identify the top five countries they exported to, along with the associated value, therefore any international sales made by a business to countries outside of their top five countries were not broken down. This means that these figures do not account for all export sales. In addition, some businesses may not have been able to allocate their total international exports to specific countries. Sales figures were combined into broad global regions, which is presented in the [data tables](#). A breakdown by goods and services for countries is not available.

Figure 13: Exports to the top 5 countries (£bn), 2021



Description of Figure 13: A bar chart showing the United States accounted for the highest value of exports, followed by France and then Germany.

Source: Trade Survey for Wales 2021, Welsh Government

Other questions

The Trade Survey for Wales asked two questions to help understand the extent to which businesses in Wales made sales of: environmental goods or services (this includes goods or services that, for example, help to minimise or treat

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pollution, repair damage to the natural environment or measure and monitor environmental protection or resource management ^[footnote 4]) and the sales of any services associated with goods (also known as 'mode 5' services, for example, an ongoing subscription for maintenance and repair, or training, or a related software subscription such as cloud storage with a phone).

The provisional 2021 estimates show:

- most businesses in Wales (88%) made no sales of environmental goods, with 9% of businesses making sales of environmental goods to UK (including Wales)
- most businesses in Wales (92%) made no sales of environmental services, with 7% of businesses making sales of environmental services to the UK (including Wales)
- in the process of selling goods, 83% of Welsh businesses did not include a service embedded in the overall product or offered as part of the sale of the good, only 15% did

Purchases

It is important to note that purchases have not been subject to the same methodological improvements as sales and so should be treated with more caution; more information can be found in the [QMI report](#). Businesses responding to the TSW were asked to indicate whether they had purchased goods and/or services in the calendar year 2021 and provide the total value of these purchases.

They were then asked to break down their purchases of goods and/or services by broad origin:

- Purchases within Wales

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- Purchases from the rest of the UK
- Purchases from the EU
- Purchases from Non-EU countries

If any purchases of goods or services were from the rest of the UK, businesses were asked to identify which UK countries (England, Scotland and Northern Ireland) they purchased from, and the value of purchases from each country.

Businesses importing goods or services outside of the UK were asked to identify the top five origin countries for their imports of goods or services.

Purchases overview

In 2021, the total provisional value of purchases from businesses in Wales was estimated to be £105.0bn. ^[footnote 5] Compared to 2020, the total value of purchases decreased by £19.7bn (16%) from £124.7bn. Compared to pre-pandemic levels (2019), the total value of purchases increased by £38.2bn (57%) from £66.9bn (please see [data considerations](#) on comparing to earlier years).

In 2021, goods accounted for almost three quarters (72%, £75.9bn) of purchases by businesses in Wales and services accounted for over a quarter (28% and £29.1bn).

Purchases by origin

Approximately 40% (£42.1bn) of purchases were from within Wales, 36% (£37.4bn) were purchases from the rest of the UK, 6% (£6.6bn) from the EU and 6% (£6.2bn) from Non-EU countries (Figure 14). Unallocated purchases accounted for 12% (£12.7bn).

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Unallocated purchase values exist where businesses made purchases but were not able to allocate it to an origin. More information about unallocated purchases can be found in the [comparability and coherence section](#).

Figure 14: Purchases by origin (£bn), 2021



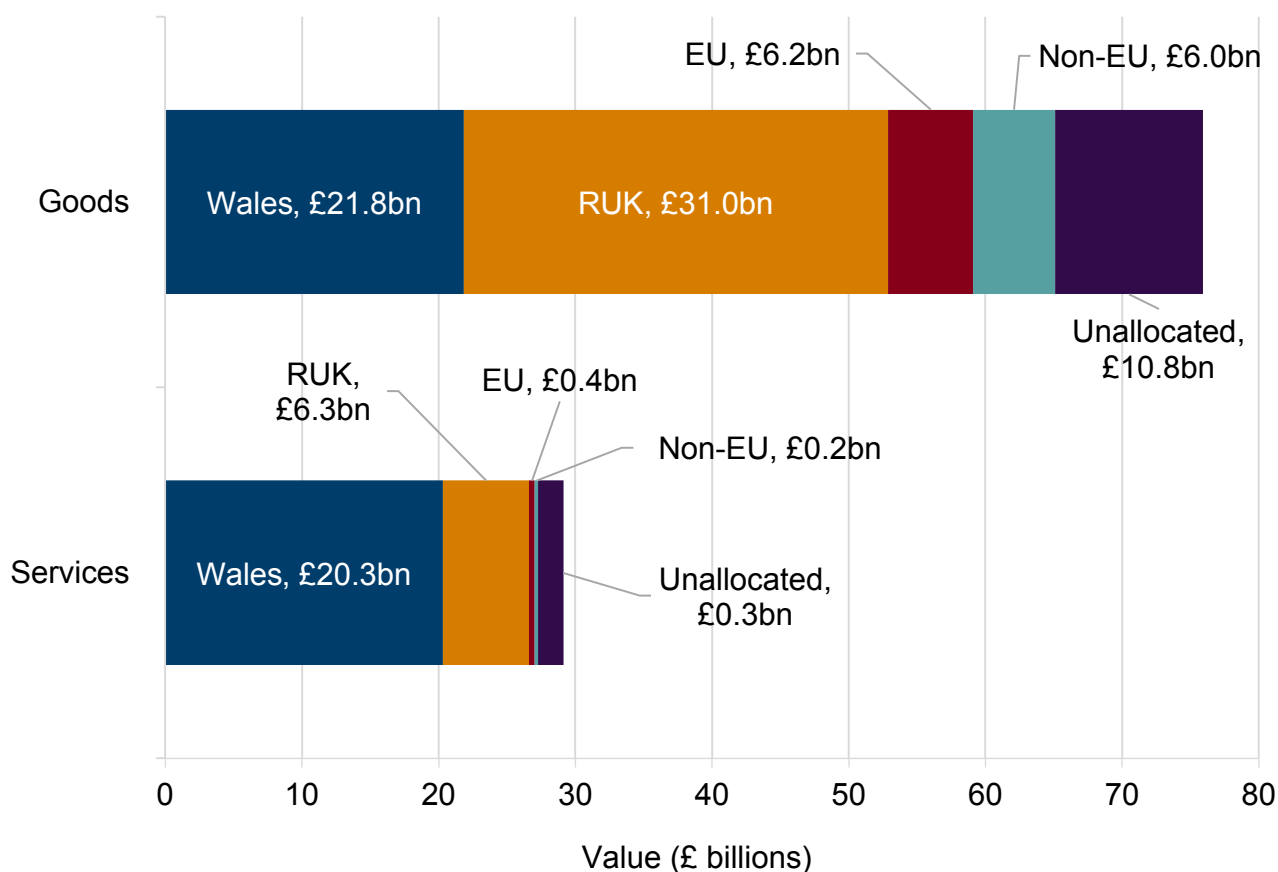
Description of Figure 14: A treemap showing businesses within Wales had the most purchases from Wales, followed by the rest of the UK.

Source: Trade Survey for Wales 2021, Welsh Government

Purchases by origin, by goods and services

Both goods and services purchases were mostly within the UK. For purchases of goods, 29% (£21.8bn) were within Wales and 41% (£31.0bn) from other parts of the UK (Figure 15). Purchases of goods from the EU and Non-EU were broadly similar, 8% (£6.2bn) and 8% (£6.0bn) respectively. For purchases of services, 70% (£20.3bn) were within Wales and 22% (£6.3bn) from other parts of the UK. For purchases of services, 70% (£20.3bn) were within Wales and 22% (£6.3bn) from other parts of the UK.

Figure 15: Purchases by origin split by goods and services (£bn), 2021



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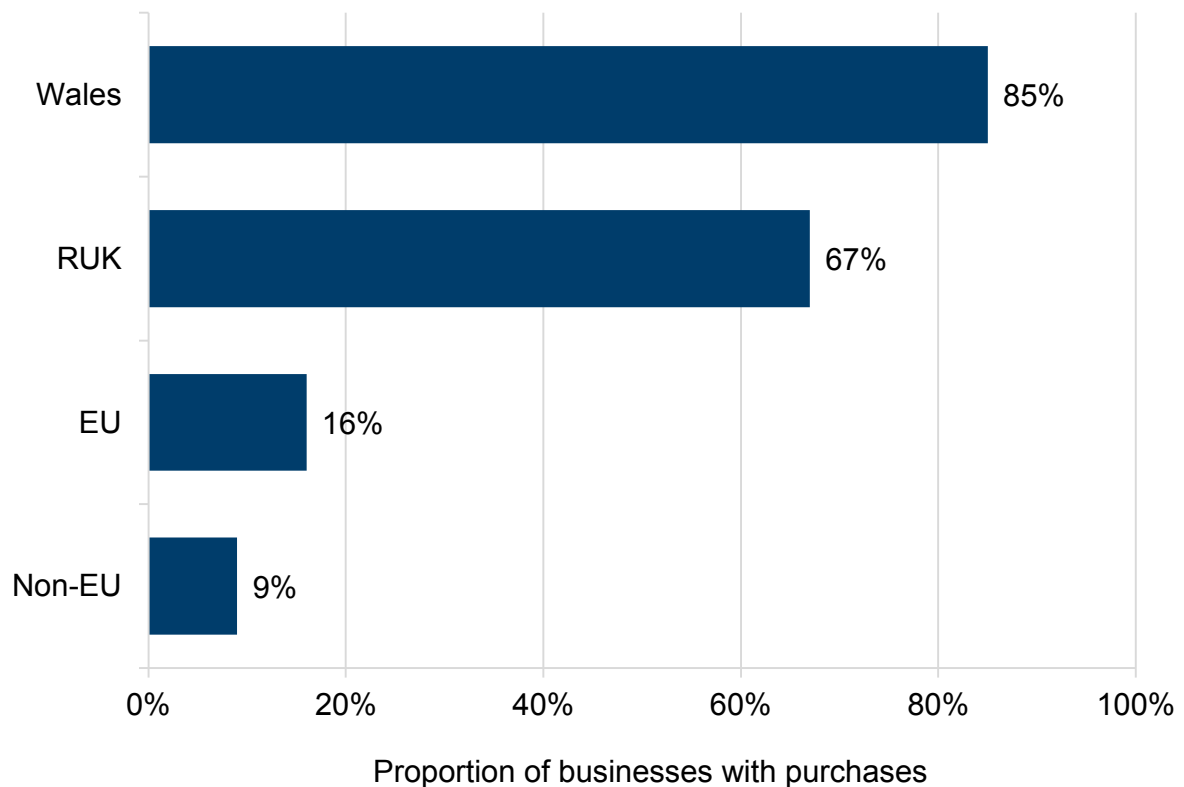
Description of Figure 15: A clustered bar chart showing goods purchases was greater than service purchases for businesses in Wales, and that goods and services purchases were mostly within the UK (including Wales).

Source: Trade Survey for Wales 2021, Welsh Government

Purchases by origin, proportion of businesses

Most businesses in Wales (85%) made purchases within the UK (including Wales) (67%). A much lower proportion of businesses imported products, with 16% importing from the EU and 9% importing from Non-EU countries (Figure 16).

Figure 16: Proportion of businesses in Wales with purchases by origin, 2021



Description of Figure 16: A bar chart showing most businesses in Wales made purchases within Wales (85%), followed by the rest of the UK (67%), EU (16%) and then Non-EU (9%).

Source: Trade Survey for Wales 2021, Welsh Government

Purchases (goods and services) by business size

Large, medium and small businesses accounted for 68% (£71.6bn), 13%

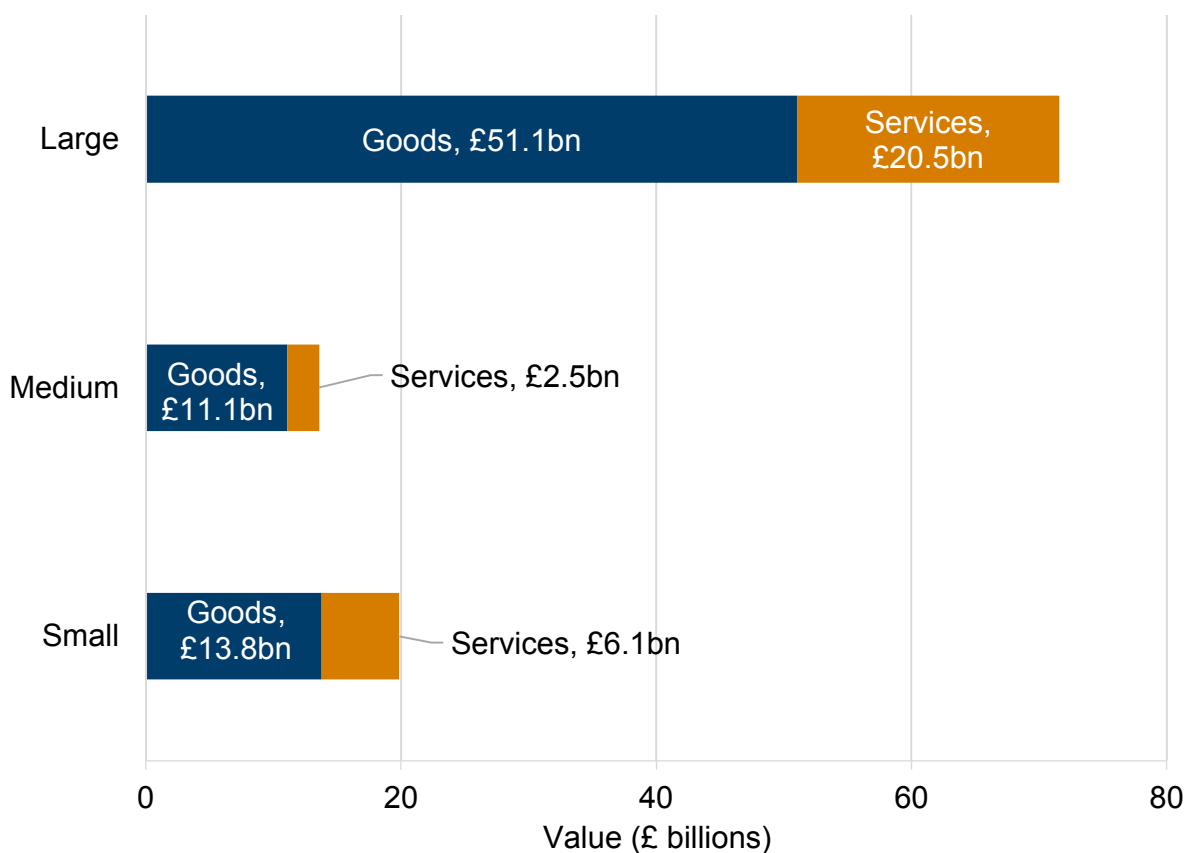
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(£13.6bn) and 19% (£19.9bn) of purchases by businesses in Wales respectively. Most purchases by large businesses were goods accounting for 71% (£51.1bn) of their purchase value. Purchases of goods accounted for 82% (£11.1bn) and 69% (£13.8bn) of medium and small businesses respectively.

Figure 17: Purchases by business size split by goods and services (£bn), 2021



Description of Figure 17: A clustered bar chart showing most of the purchases were by large businesses and that purchases for all business sizes were mostly goods.

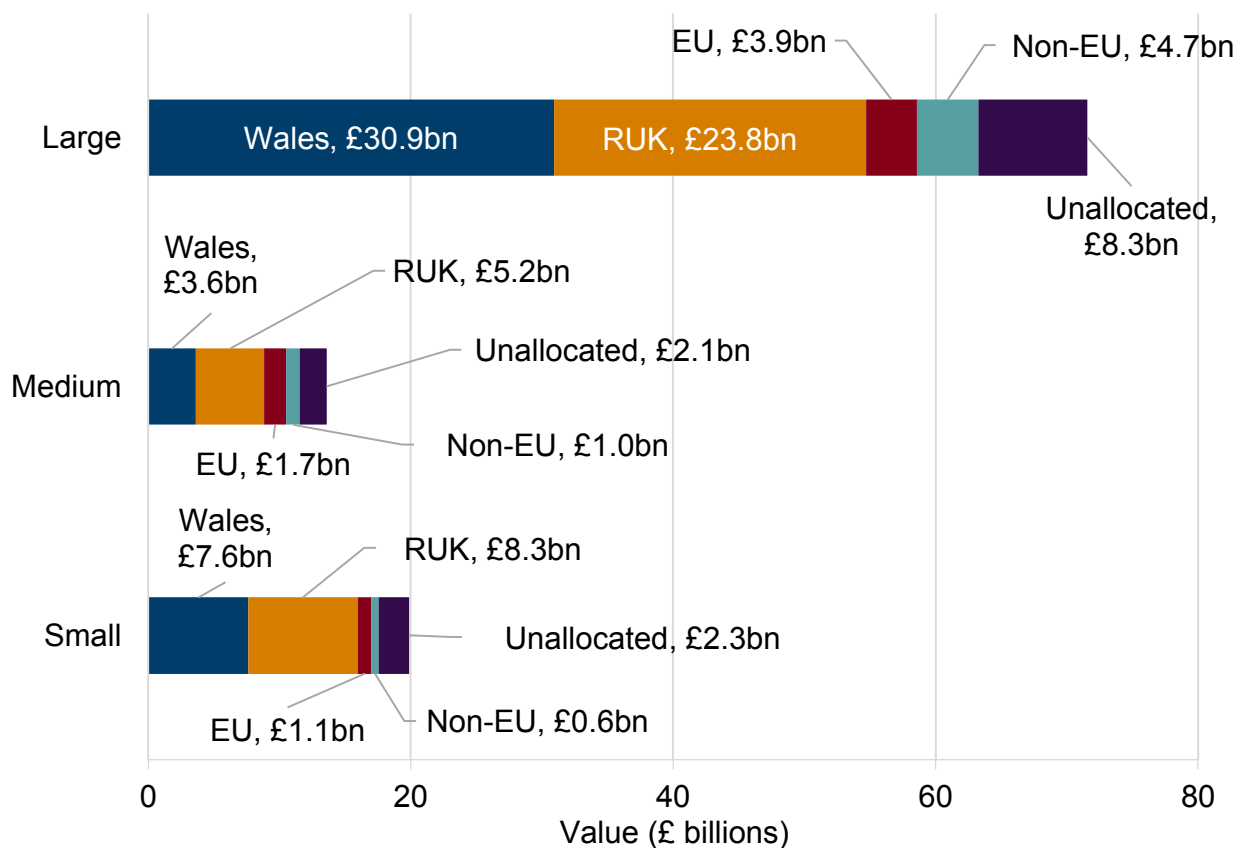
Source: Trade Survey for Wales 2021, Welsh Government

Purchases by business size and origin

Around 76% (£79.5bn) of all purchases were made within the UK. Figure 18 shows that large businesses had the highest proportion of purchases from Wales (43%, £30.9bn). Small businesses had the highest proportion of purchases from the rest of the UK (42%, £8.3bn)

International purchases accounted for 12% (£8.6bn), 20% (£2.7bn) and 8% (£1.6bn) of large, medium, and small business purchases respectively. Large businesses had the highest value of unallocated purchases accounting for 12% (£8.3bn) of their purchase value.

Figure 18: Purchases by business size and origin (£bn), 2021



Description of Figure 18: A clustered bar chart showing most of the purchases for large businesses were from Wales and most of the purchases for small and medium businesses were from the rest of the UK.

Source: Trade Survey for Wales 2021, Welsh Government

Purchases by sector

The 'Business and other services' sector had the highest value of overall purchases accounting for 28% (£29.5bn) of all purchases from businesses in

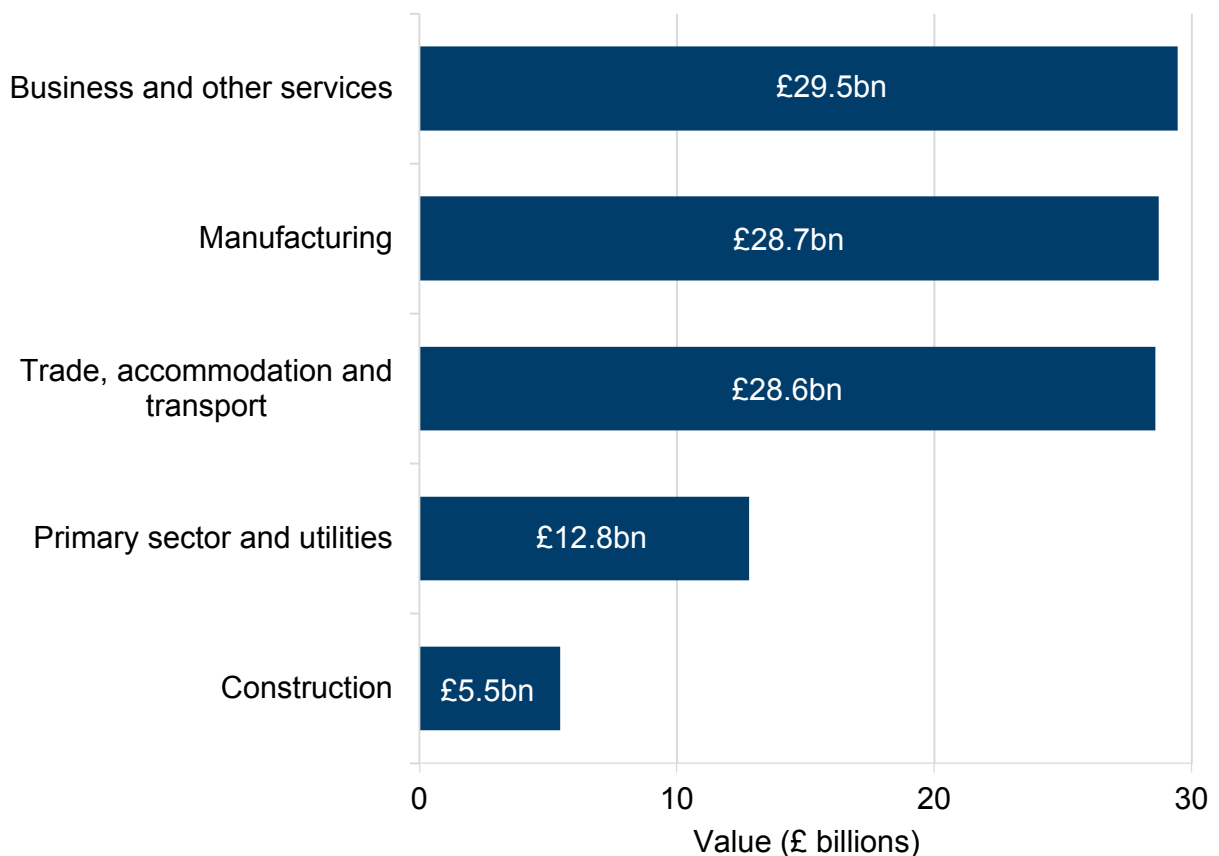
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Wales (Figure 19). 'Manufacturing' was the second highest with 27% (£28.7bn), followed closely by 'Trade, accommodation and transport' with 27% (£28.6bn). 'Primary sector and utilities' accounted for 12% (£12.8bn) and 'Construction' accounted for 5% (£5.5bn) of all purchases from businesses in Wales.

Figure 19: Purchases by sector (£bn), 2021



Description of Figure 19: A bar chart showing the highest value of purchases were by businesses in the 'Business and other services' sector.

Source: Trade Survey for Wales 2021, Welsh Government

Purchases by sector and origin

Over three quarters (78%, £23.0bn) of purchases in the 'business and other services' sector were made within Wales, 12% (£3.6bn) came from the rest of the UK and 4% (£1.1bn) internationally (Table 3). Almost half (49%, £13.9bn) of purchases in the 'trade, accommodation and transport' sector were made from the rest of the UK, followed by 34% (£9.6bn) coming from Wales. The manufacturing sector had almost half (43%, £12.4bn) of its purchases value within the UK and almost a third (30%, £8.6bn) of its purchases value internationally, with 27% (£7.7bn) unallocated. This was the highest unallocated value and proportion across all the sectors. Purchases within other sectors were mostly within the UK.

Table 3: Purchases by sector and origin (£ Millions), 2021 [Note 1]

Business Sector [Note 2]	Wales	RUK	EU	Non-EU	Unallocated	Total
Primary sector and utilities	2,699	9,065	[c]	[c]	841	12,801
Construction	3,580	1,644	[c]	[c]	210	5,459
Business and other services	23,031	3,622	614	445	1,740	29,451
Manufacturing	3,213	9,148	4,694	3,939	7,725	28,720
Trade, accommodation and transport	9,605	13,889	1,152	1,812	2,139	28,597

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Business Sector [Note 2]	Wales	RUK	EU	Non-EU	Unallocated	Total
Total	42,128	37,368	6,628	6,249	12,655	105,028

Source: Trade survey for Wales 2021, Welsh Government

[Note 1] Figures have been suppressed where values are non-disclosive and are denoted by [c].

[Note 2] Businesses making purchases in 2021 (1,061), Primary sector and utilities (52), Construction (130), Business and other services (287), Manufacturing (185) and Trade, accommodation and transport (407).

Purchases from the rest of the UK by country

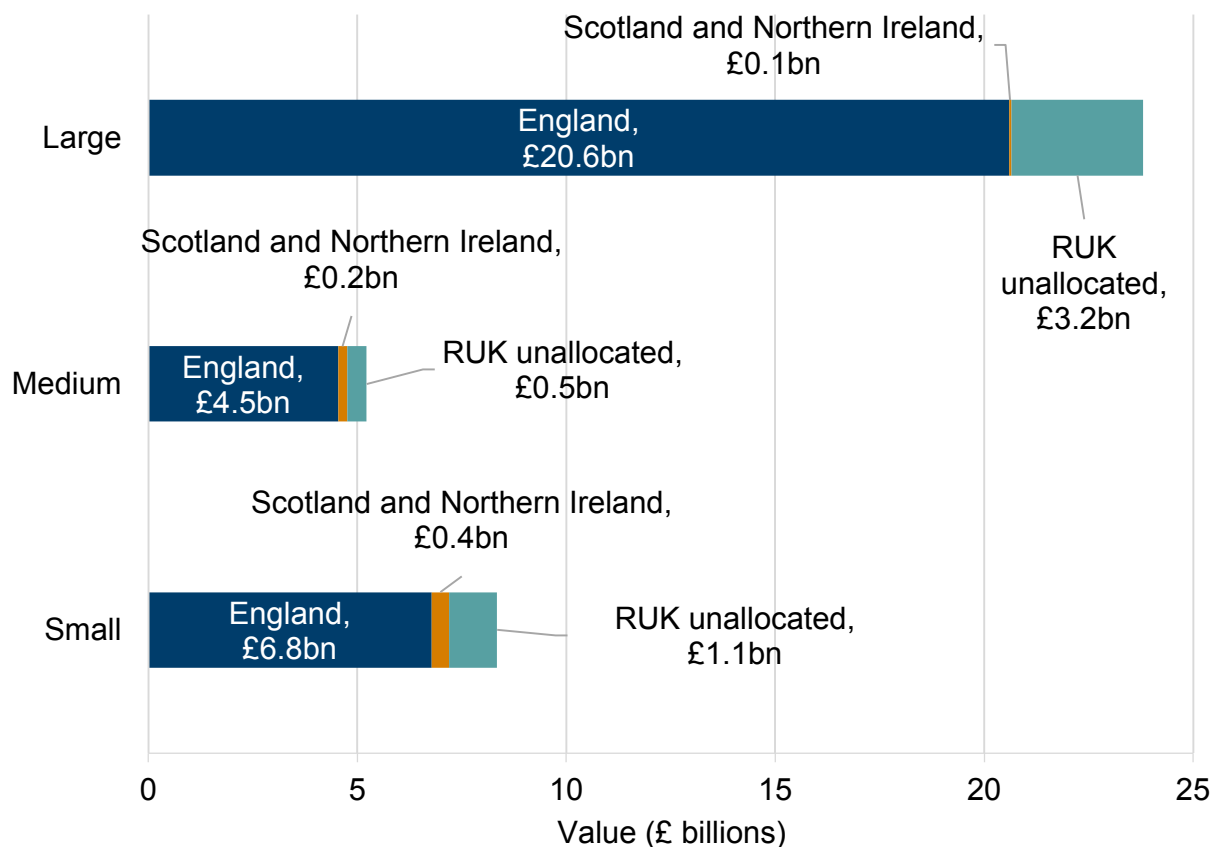
Purchases within the rest of the UK accounted for 36% (£37.4bn) of all purchases by businesses in Wales. Of these, most of the purchases were from England (85%, £31.9bn), followed by Scotland and Northern Ireland with 1% (£0.5bn) and 0.4% (£0.2bn) respectively. A further 13% (£4.8bn) of UK purchases were unable to be allocated. The rest of the UK country split breakdown by business size in general followed the total country split with all business sizes (small, medium and large) purchasing most from England within the rest of the UK (Figure 20).

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Figure 20: Rest of the UK purchases by country and business size (£bn), 2021

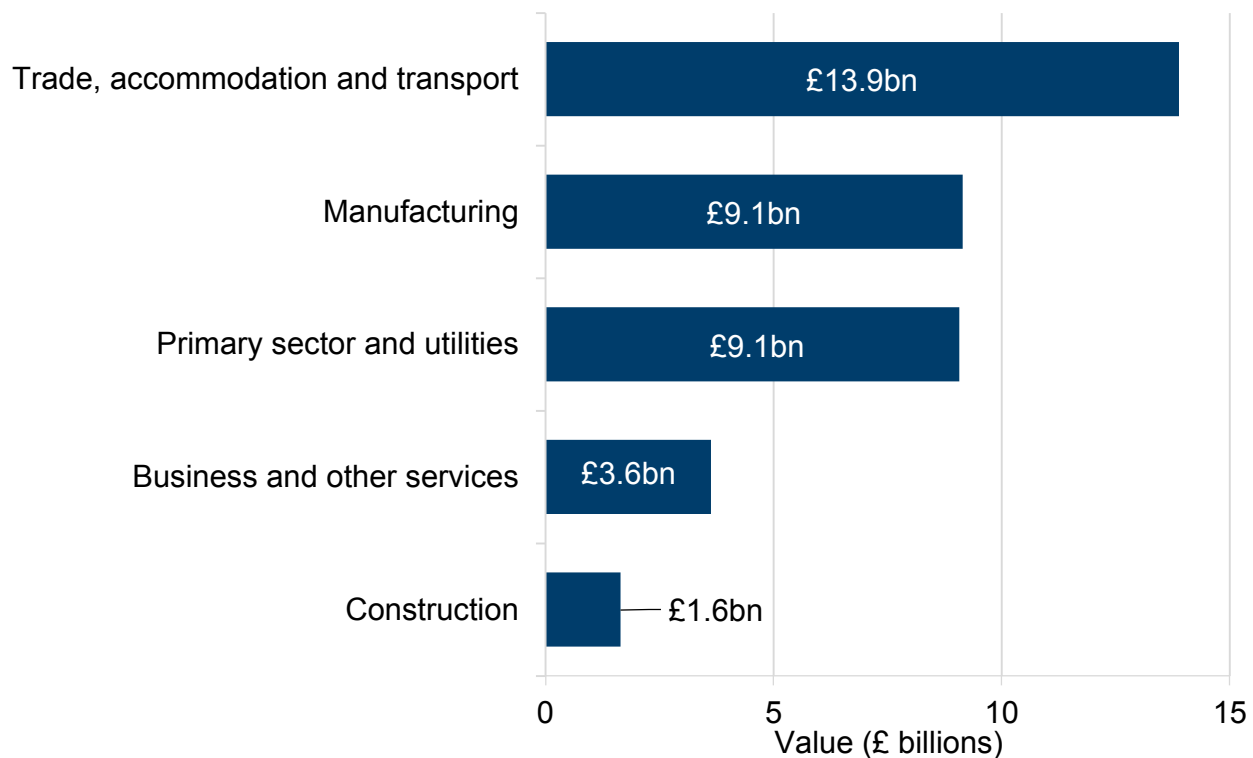


Description of Figure 20: A clustered bar chart showing for the rest of the UK purchases across all business sizes, most were from England.

Source: Trade Survey for Wales 2021, Welsh Government

The 'Trade, accommodation and transport' sector had the highest proportion of purchases within the rest of the UK with 37% (£13.9bn) of Welsh business purchases. This was followed by almost a quarter of purchases from the 'Manufacturing' sector (24%, £9.1bn), and almost a quarter of purchases from the 'Primary, sector and utilities' sector (24%, £9.1bn).

Figure 21: Purchases from the rest of the UK by business sector (£bn), 2021



Description of Figure 21: A bar chart showing most of the purchases from rest of the UK were by Welsh businesses in the 'Trade, accommodation and transport' sector.

Source: Trade Survey for Wales 2021, Welsh Government

Businesses in Wales mostly made UK purchases within England (85%, £31.9bn) including across every sector (Table 4). The 'Trade, accommodation and transport' sector had the largest value of purchases from the rest of the UK, with England accounting for 83% (£11.6bn) of purchase value in this sector. England also accounted for over three-quarters (79%, £7.2bn) of purchase values by the 'Manufacturing' sector, and most purchase values by the 'Primary sector and

utilities” sector (96%, £8.7bn).

Table 4: Rest of the UK purchases by sector and origins (£ Millions), 2021 [Note 1]

Business Sector [Note 2]	England	Scotland	Northern Ireland	RUK Unallocated	RUK Total
Primary sector and utilities	8,660	[c]	[c]	[c]	9,065
Construction	1,135	[c]	[c]	[c]	1,644
Business and other services	3,291	22	44	265	3,622
Manufacturing	7,240	110	116	1,682	9,148
Trade, accommodation and transport	11,590	22	3	2,274	13,889
Total	31,916	529	166	4,757	37,368

Source: Trade survey for Wales 2021, Welsh Government

[Note 1] Figures have been suppressed where values are non-disclosive and are denoted by [c].

[Note 2] Businesses making purchases in 2021 (1,061), Primary sector and utilities (52), Construction (130), Business and other services (287), Manufacturing (185) and Trade, accommodation and transport (407).

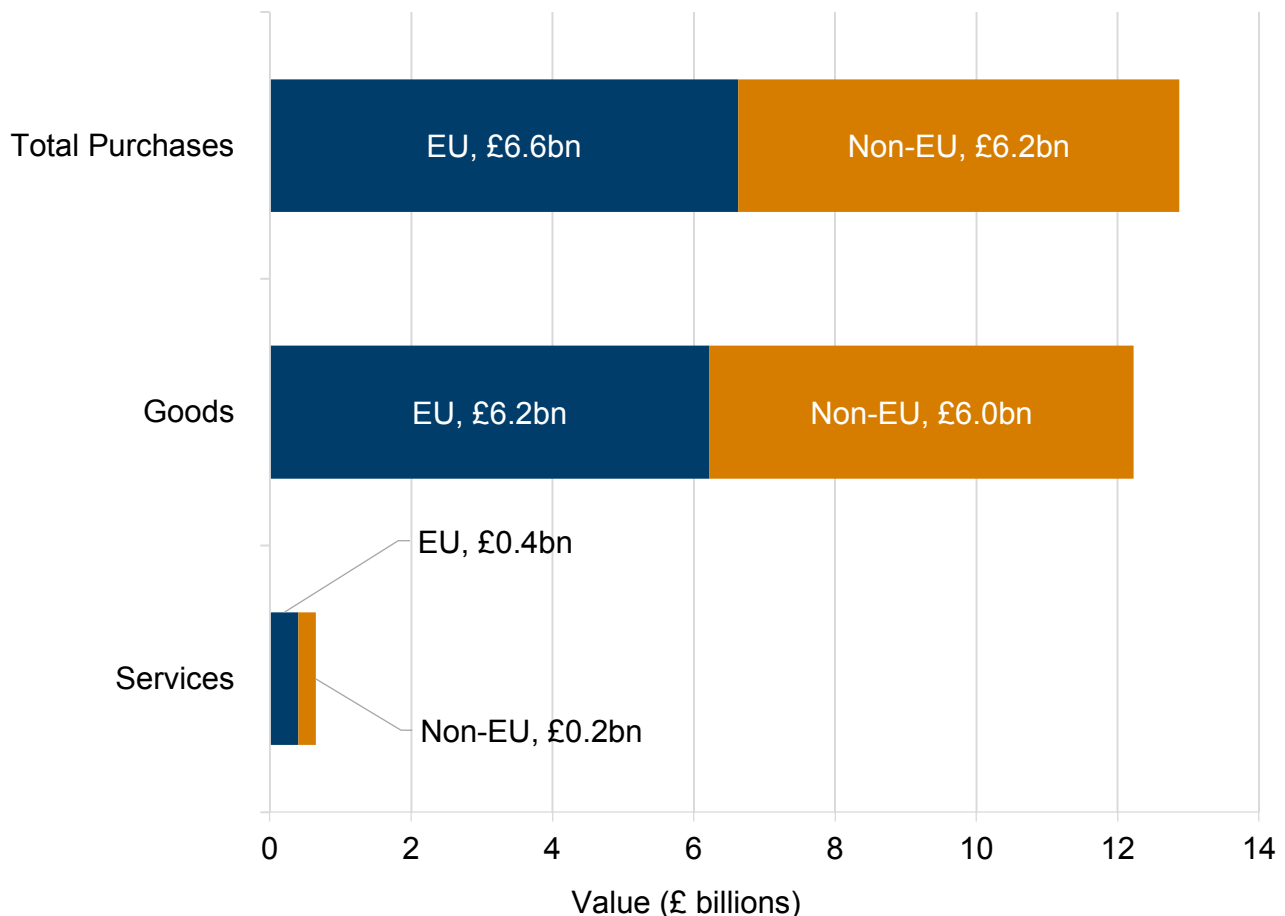
International imports

The value of international imports to businesses in Wales was estimated to be £12.9bn. Goods accounted for 95% (£12.2bn) of all international business imports.

It should be noted that the value of unallocated purchases (£12.7bn) is substantial when compared to the total value of international imports and has slightly increased from the 2019 estimates. This is discussed further in the [comparability and coherence section](#).

Goods imports were broadly split evenly between the EU (51%, £6.2bn) and Non-EU (49%, £6.0bn). The EU accounted for almost two-thirds of service imports (62%, £0.4bn) and Non-EU for over a third (38%, £0.2bn) of service imports (Figure 22).

Figure 22: International imports by broad origin split by goods and services (£bn), 2021



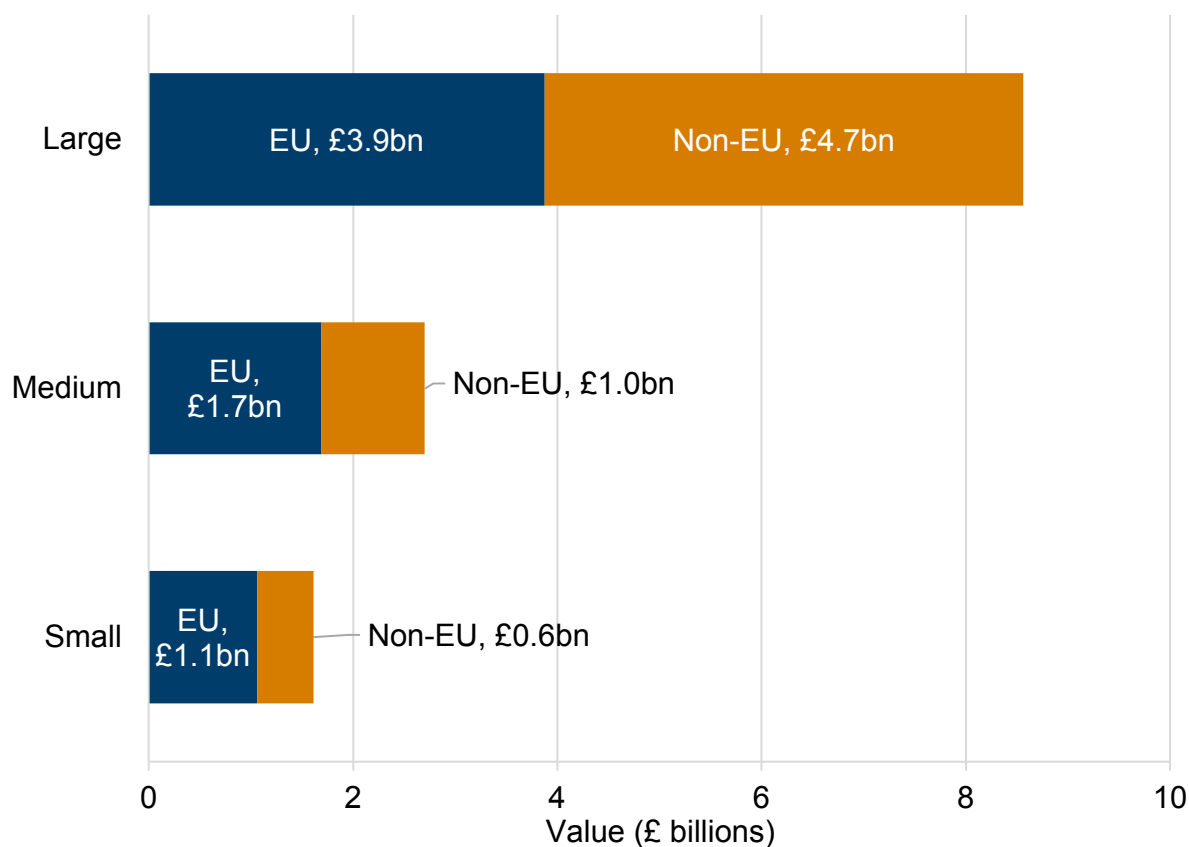
Description of Figure 22: A clustered bar chart showing that most imports were in goods, and most of the imports for good and services came from EU countries.

Source: Trade Survey for Wales 2021, Welsh Government

Figure 23 shows that about two-thirds of international imports came from the EU for small (66%, £1.1bn) and medium businesses (63%, £1.7bn), whereas large

businesses imported more by value from Non-EU countries (55%, £4.7bn).

Figure 23: International imports by business size and origin (£bn), 2021



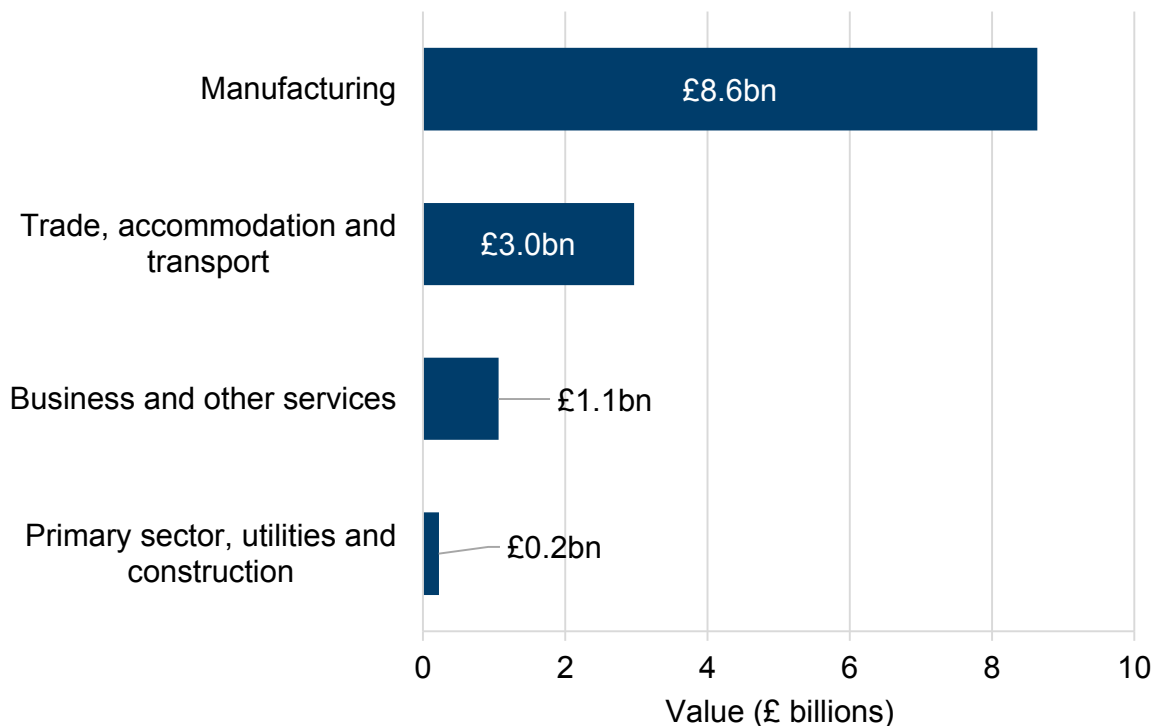
Description of Figure 23: A clustered bar chart showing most imports were by large businesses.

Source: Trade Survey for Wales 2021, Welsh Government

International imports were mostly made by the 'Manufacturing' sector (67%, £8.6bn). The second highest import sector was the 'Trade, accommodation and

transport' sector which accounted for almost a quarter (23%, £3.0bn) of international imports (Figure 24).

Figure 24: International imports by sector (£bn), 2021



Description of Figure 24: A clustered bar chart showing that the 'manufacturing' sector imported the most.

Source: Trade Survey for Wales 2021, Welsh Government

Total trade

Total trade estimates are presented to give an overview of the relative overall

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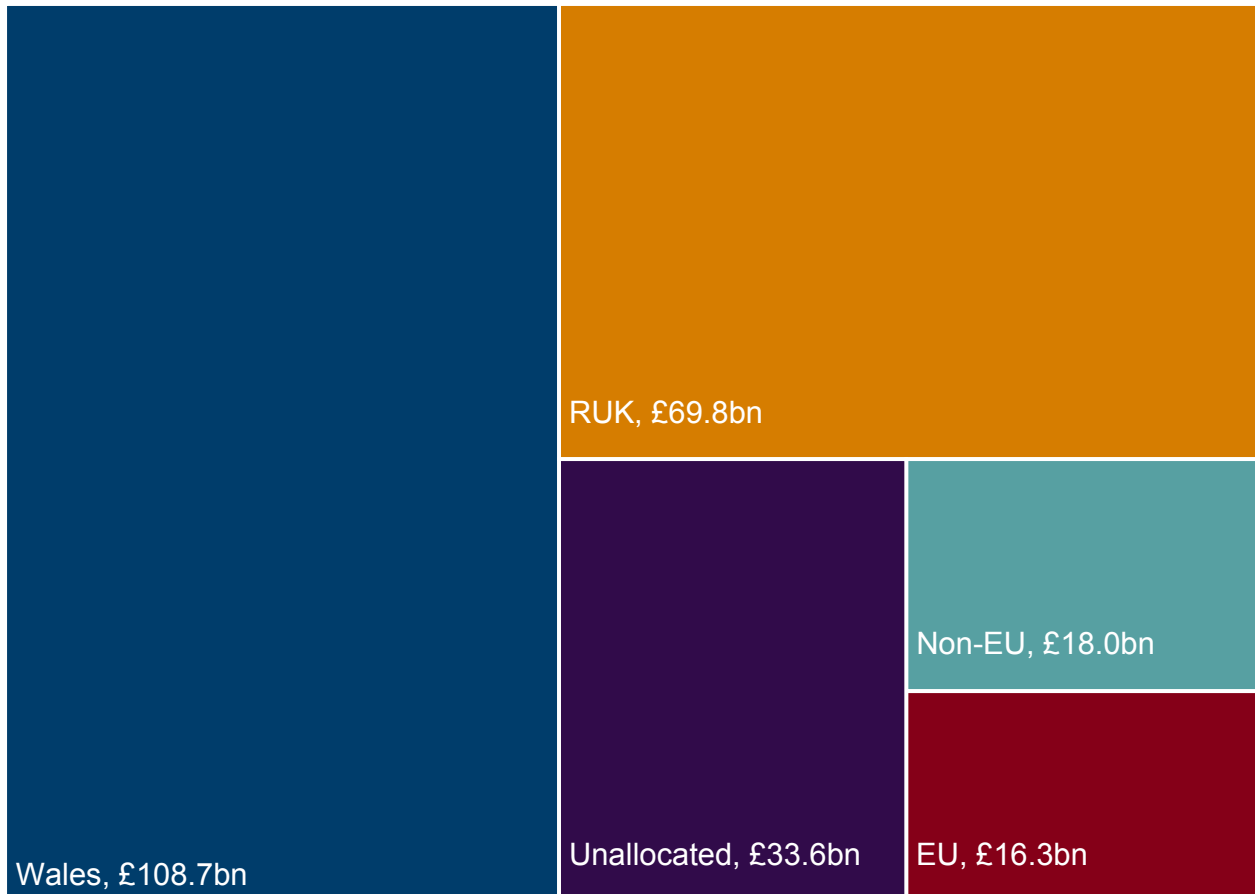
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importance of broad markets. Estimates presented for total trade have been produced by aggregating results for the separate sales and purchases sections. It should be noted that the estimates have limited coverage, and that there was a slightly different methodology in calculating the sales and purchases estimates as outlined in the [QMI report](#), and should not be used to calculate a trade balance.

The value of total trade (sales + purchases) from businesses in Wales in 2021 was £246.4bn, which is higher than the estimate for 2019 (£188.9bn) (r). Approximately 44% (£108.7bn) of total trade was within Wales, 28% (£69.8bn) was within the rest of the UK. The international markets had 14% (£34.2bn) of total trade; 7% (£16.3bn) with the EU and 7% (£18.0bn) with Non-EU countries. There was a substantial 14% (£33.6bn) of trade value unallocated (Figure 25).

Figure 25: Total trade by market (£bn), 2021



Description of Figure 25: A treemap showing businesses within Wales had the most total trade internally within Wales, followed by the rest of the UK.

Source: Trade Survey for Wales 2021, Welsh Government

Comparability and coherence

Comparability across the years

TSW comparison across years

Most comparisons are made to TSW 2019 due to the volatility of 2020 data. Variability in the achieved sample across the years of fieldwork may affect the ability to make robust purchase comparisons across the years, as well as other external factors such as Covid-19. ^[footnote 6] See the [QMI report](#) for more detail. Breakdowns by destination, business size and sector have shown greater variability year-on-year (YoY), specific comparisons are discussed below.

It should also be noted that the value of unallocated trade in TSW 2021 has increased substantially from previous years. Unallocated sales increased from £3.9bn in 2019 (r) to £20.9bn in 2021. Unallocated trade is a result of businesses providing the total value of their sales and/or purchases but unable to provide a geographical breakdowns of this trade. It is important to consider these changes when looking at results across years. A proportion of the value changes seen across years is likely to be a result of an increase in unallocated trade value.

Comparability of sales

Sales by destination, 2018 to 2021

In 2021, sales from businesses in Wales has increased compared to previous years. This is mainly driven by an increase in sales within Wales which saw an increase of £13.1bn from 2020 and £7.9bn from 2019. Unallocated sales also

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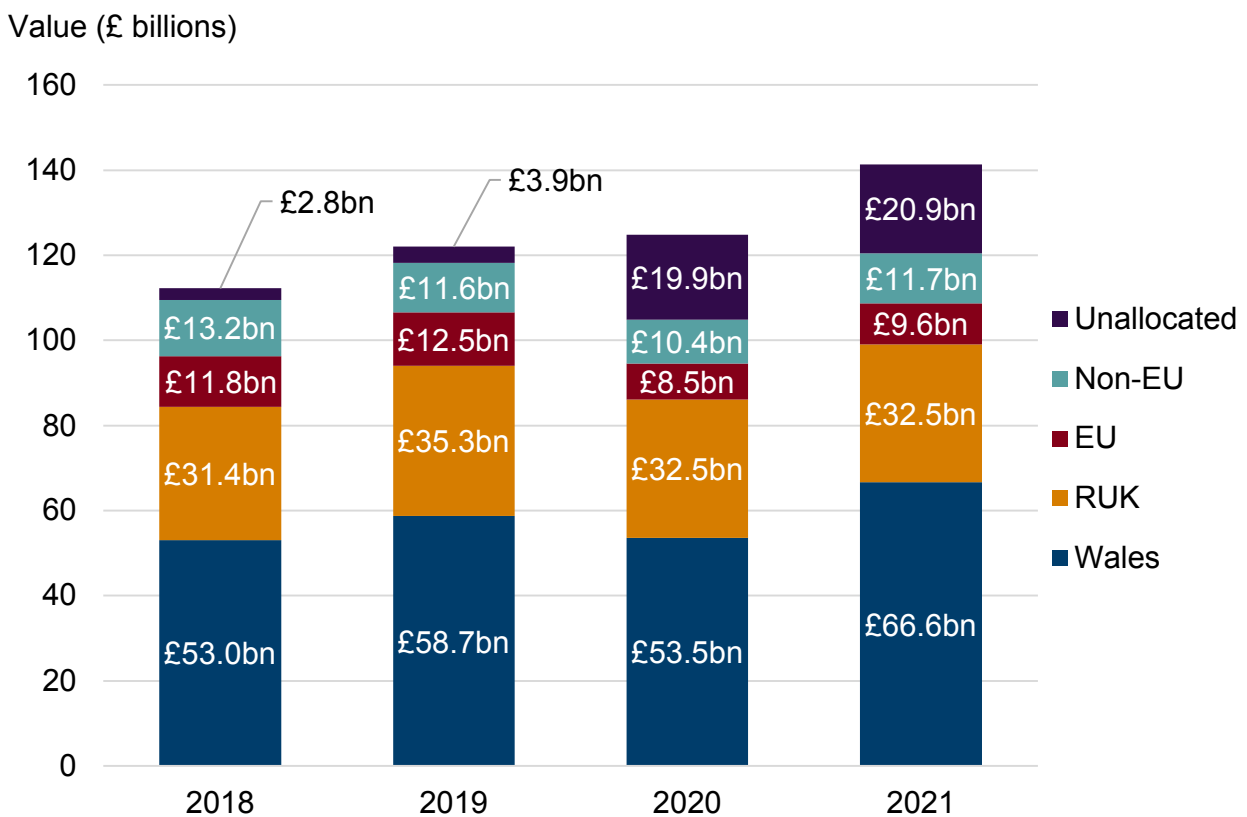
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contributed to this increase.

In 2021 international sales from businesses in Wales was £21.3bn, still lower than pre-pandemic levels in 2019 of £24.1bn (r). This volatility is likely driven by the impact of global events such as COVID-19 and an increase in unallocated sales which would have formed some of the international sales, and so does not necessarily reflect on-the-ground changes.

Figure 26: Sales by destination (£bn), 2018 to 2021



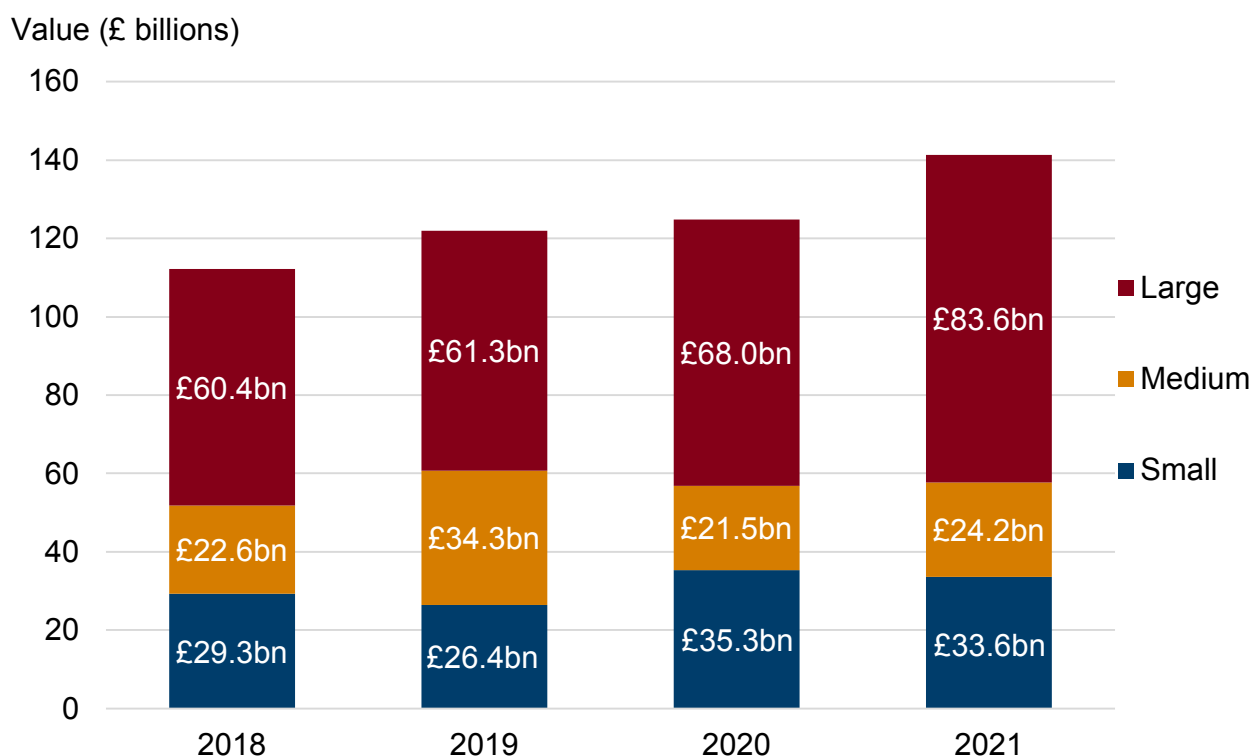
Description of Figure 26: A clustered bar chart showing sales from 2018 to 2021 steadily increasing, with Welsh and unallocated sales contributing.

Source: Trade Survey for Wales 2021, Welsh Government

Sales by business size, 2018 to 2021

Sales from large businesses consistently made up proportionately at least 50% of total sales, rising from 50% (£61.3bn) in 2019 to 59% (£83.6bn) in 2021. From 2019 to 2021, sales of Welsh businesses increased, despite sales of medium businesses falling by 29% (£10.1bn). This increase was driven by the value of sales from large businesses increasing by 36% (£22.3bn) and sales from small businesses increasing by just over a quarter (27%, £7.1bn) between this period. Sample variation and/or respondent profiles may have contributed to the cause of these changes.

Figure 27: Sales by business size (£bn), 2018 to 2021



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Description of Figure 27: A clustered bar chart showing large businesses mainly drove the increase of sales between 2018 and 2021.

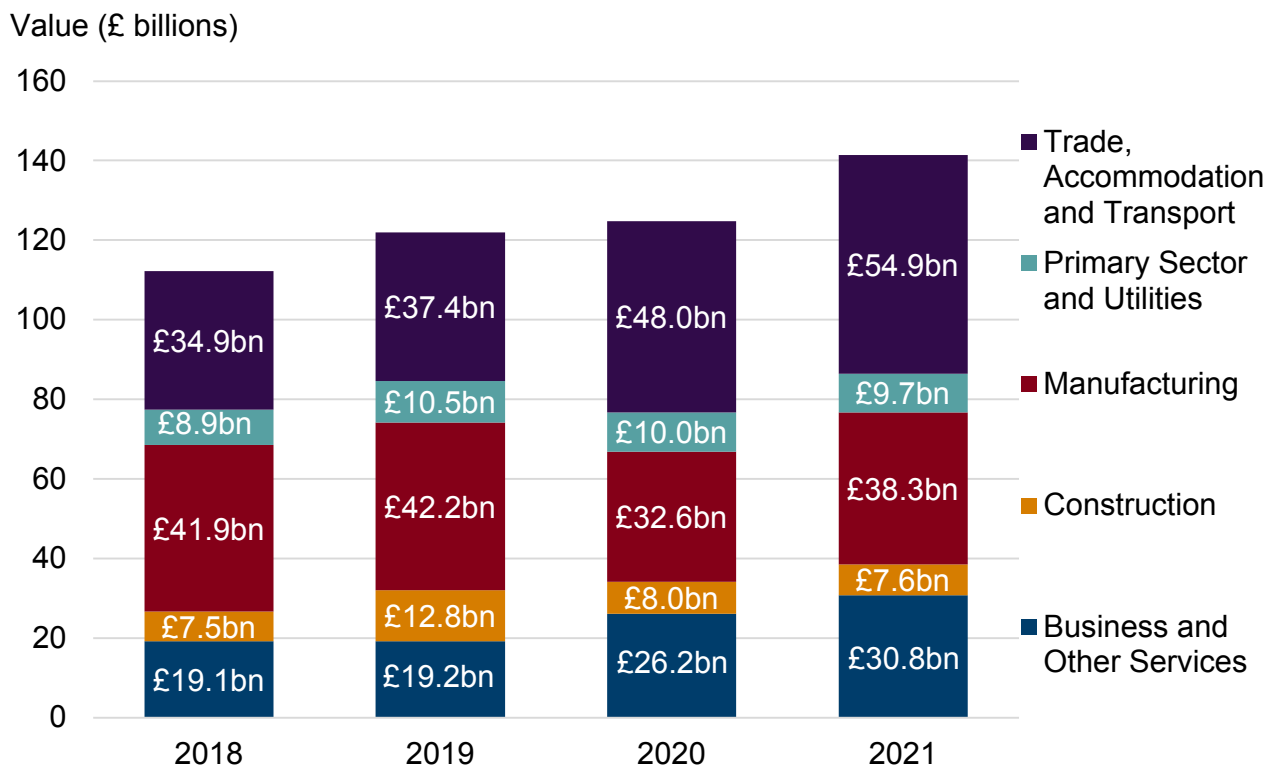
Source: Trade Survey for Wales 2021, Welsh Government

Sales by sector, 2018 to 2021

Consecutively, in 2020 and 2021, Welsh businesses in the 'Trade, Accommodation and Transport' sector had the most sales with £54.9bn in 2021 and £48.0bn in 2020. However, in 2019 the 'Manufacturing' sector had the most sales with £42.2bn (r).

The largest increase from 2019 to 2021 was in the 'Trade, Accommodation and Transport' sector which increased by £17.6bn. These changes may in part be due to the difference in sample variation and/or respondent profiles.

Figure 28: Sales by sector (£bn), 2018 to 2021



Description of Figure 28: A clustered bar chart showing businesses within the ‘Trade, accommodation and transport’ sector mainly drove the increase of sales between 2018 and 2021.

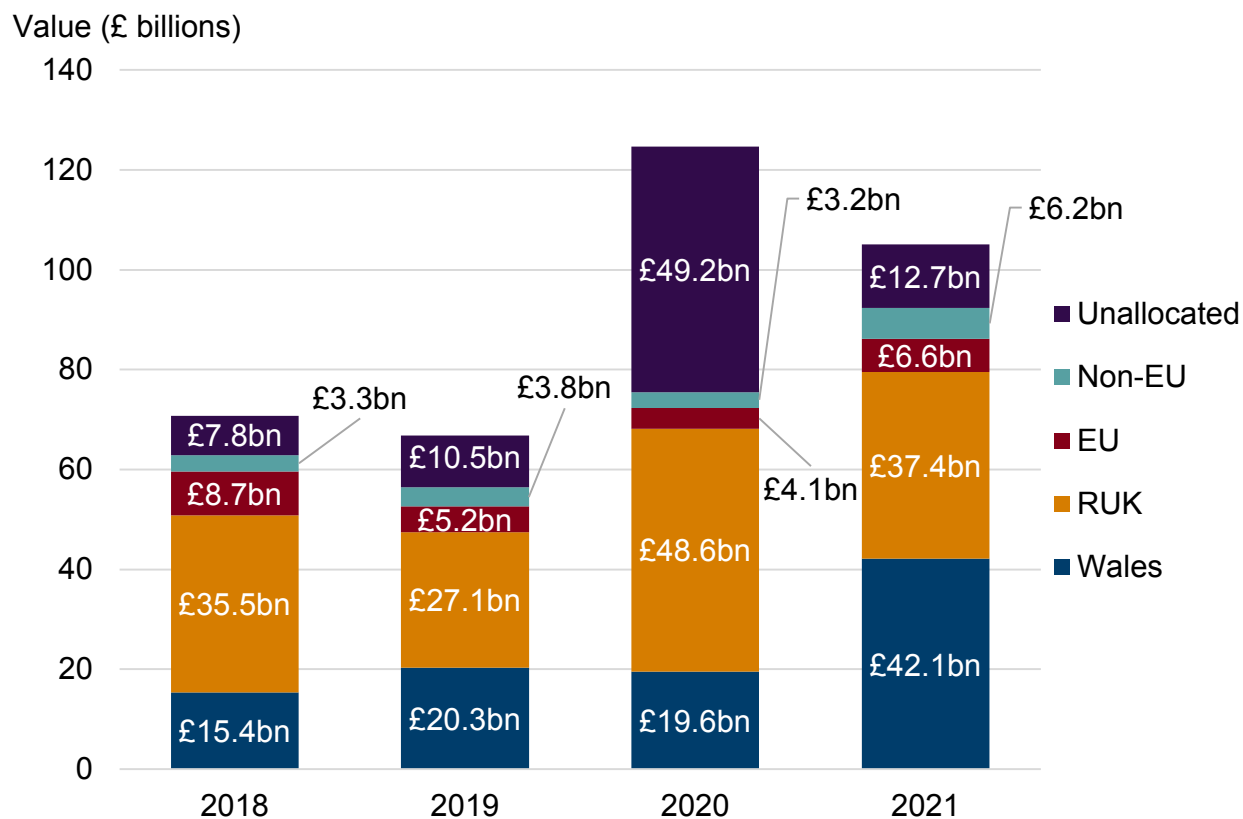
Source: Trade Survey for Wales 2021, Welsh Government

Comparability of purchases

Purchases by origin, 2018 to 2021

In 2021, purchases from businesses in Wales increased to £105.0bn, compared with £66.9bn in 2019 and £124.7bn in 2020. The sharp increase in purchases in 2020 was mainly driven by a large increase in unallocated purchases and was likely impacted by global events (COVID-19 and its after effects). Purchases have not been subject to the same across-years imputation methodology as sales, and so remain particularly volatile due to changes in sample variations and/or respondent profiles across the years.

Figure 29: Purchases by origin (£bn), 2018 to 2021



Description of Figure 29: A clustered bar chart showing purchases have increased from 2018 through to 2021, with a sharp peak in 2020.

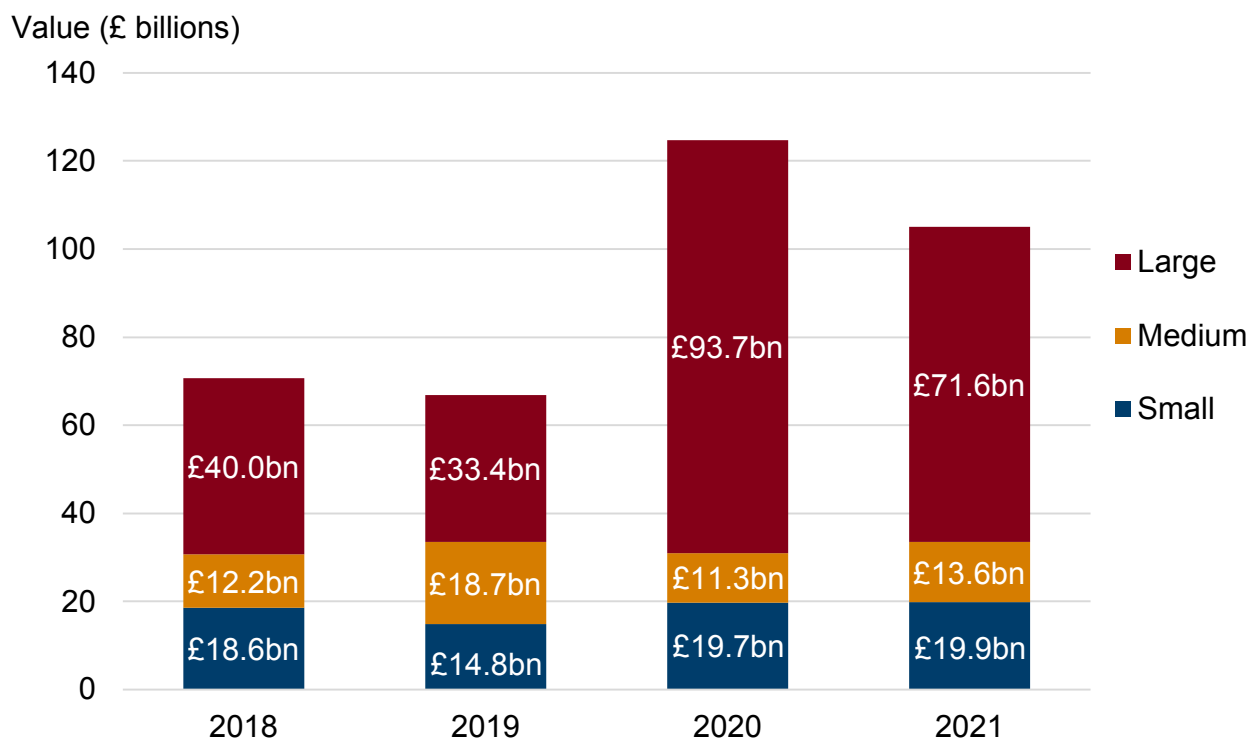
Source: Trade Survey for Wales 2021, Welsh Government

Purchases by business size, 2018 to 2021

Purchases from large businesses consistently make up at least half of total purchases, rising from 50% (£33.4bn) in 2019 to 68% (£71.6bn) in 2021. From 2019 to 2021, purchases of Welsh businesses have increased, despite

purchases of medium businesses falling by 27% (£5.1bn). This was driven by purchases of large businesses increasing by 115% (£38.2bn) and purchases from small businesses increasing by 34% (£5.0bn) between this period. Sample variation and/or respondent profiles may have contributed to the cause of these changes.

Figure 30: Purchases by business size (£bn), 2018 to 2021



Description of Figure 30: A clustered bar chart showing large businesses had the highest value of purchases each year between 2018 to 2021.

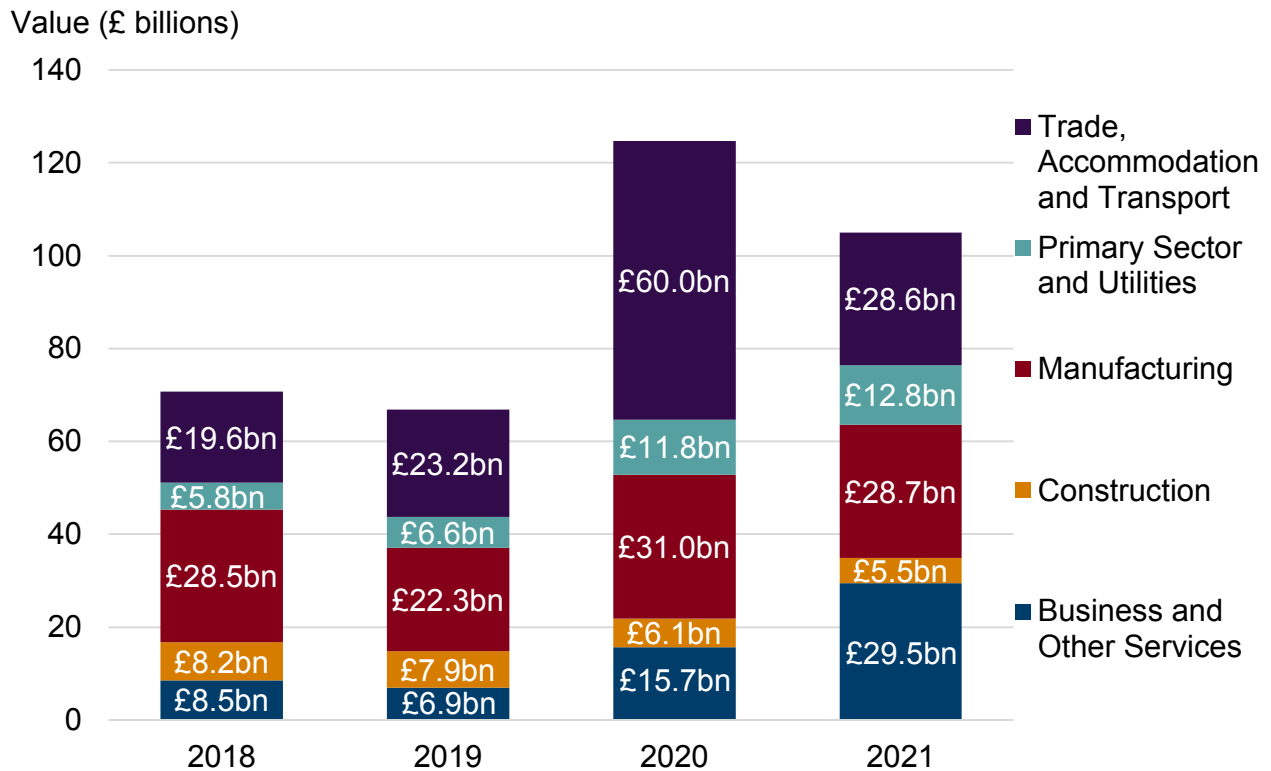
Source: Trade Survey for Wales 2021, Welsh Government

Purchases by sector, 2018 to 2021

The value of purchases increased the most (325%, £22.5bn) in the 'Business and Other Services' sector from 2019 to 2021, to become the sector with the highest value of purchases in 2021. In addition, the proportion of total purchases from this sector has grown the most compared to other sectors, from 10% in 2019 to over a quarter in 2021 (28%).

The 'Trade, Accommodation and Transport' and 'Manufacturing' sectors previously had the highest value of purchases in 2020, 2019 and 2018 and are sectors which continue to make a high proportion of Welsh purchases. From 2019 to 2021, the 'Trade, Accommodation and Transport' and 'Manufacturing' sectors both increased purchases by 23% (£5.4bn) and 29% (£6.4bn) respectively. These changes may, in part, be due to the difference in sample variation and/or respondent profiles.

Figure 31: Purchases by sector (£bn), 2018 to 2021



Description of Figure 31: A clustered bar chart showing purchases by businesses in the ‘Trade, accommodation and transport’ and ‘manufacturing’ sectors consistently made up a high proportion of purchases between 2018 and 2021. In 2021, purchases from within the ‘Business and Other services’ sector also increased substantially.

Source: Trade Survey for Wales 2021, Welsh Government

Coherency to existing data sources

Comparability to existing international trade statistics

Despite methodological differences which mean figures are not directly comparable, high level TSW findings are presented alongside **Regional trade statistics (RTS) (HMRC)** and **International trade in UK nations, regions and cities (ONS)** for transparency. The following comparisons of the estimates should be treated with caution and appropriate consideration of the differences in methodologies, what is captured and the large increase in unallocated trade in the 2021 TSW estimates. These may impact international trade values produced using the TSW methodology.

HMRC and ONS use a comprehensive administrative dataset and then apportion sales to Wales ('top-down' approach). In contrast, TSW is a survey driven dataset that seeks to estimate what happens on the ground ('bottom-up' approach). These differences should be considered when making comparisons.

TSW international export value estimates compared against other sources

The provisional TSW estimates of international goods export values for 2021 were £19.6bn with 45% (£8.9bn) going to the EU and 55% (£10.7bn) going to Non-EU countries. Comparatively, Wales' international goods exports were estimated to be £15.2bn and £17.0bn by HMRC and ONS respectively. HMRC estimated 60% (£9.1bn) was exported to the EU and 40% (£6.1bn) to Non-EU countries. Additionally, ONS estimated 57% (£9.7bn) was exported to the EU and 43% (£7.2bn) to Non-EU countries.

The international service exports for 2021 were estimated to be £1.7bn in TSW,

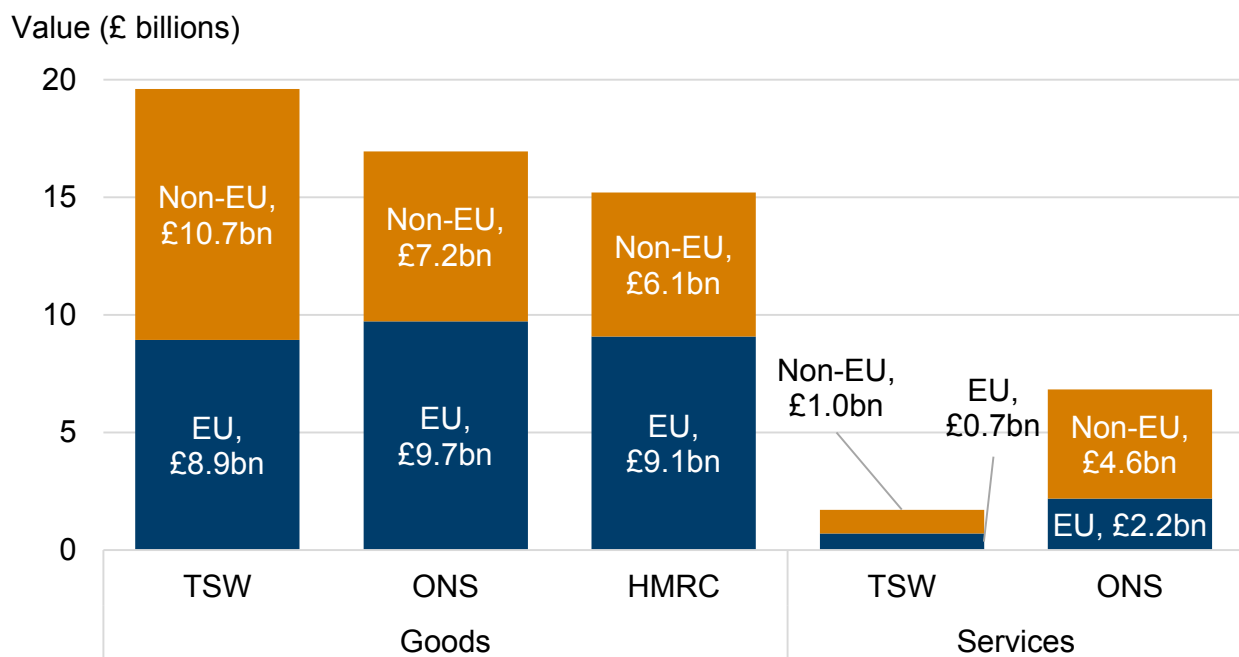
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41% (£0.7bn) going to the EU and 59% (£1.0bn) going to Non-EU countries. Comparatively, international service exports were estimated to be £6.8bn by ONS, with 32% (£2.2bn) exported to the EU and 68% (£4.6bn) to Non-EU countries. HMRC only produce estimates for goods.

Figure 32: TSW exports split by goods and services and by broad region compared against the other data sources (£bn), 2021



Description of Figure 32: A clustered bar chart showing for 2021, TSW goods export estimates were higher than HMRC and ONS estimates and TSW services export estimates were lower than ONS estimates.

Source: Trade Survey for Wales 2021, Welsh Government

Table 5: TSW international exports compared against other sources (£bn), 2021

	TSW	ONS	HMRC [Note 1]
EU goods	8.9	9.1	9.7
Non-EU goods	10.7	6.1	7.2
Total goods	19.6	15.2	17.0
EU services	0.7	2.2	[z]
Non-EU services	1.0	4.6	[z]
Total services	1.7	6.8	[z]

Source: Trade Survey for Wales 2021, Welsh Government, HMRC, ONS

[Note 1] The [z] symbol is used to denote data points that are not applicable.

TSW international exports by partner country compared against other sources

The following estimates should be treated with caution using the appropriate caveats and limitations. HMRC and ONS both rely upon admin data, which is based on customs declarations so will have more complete coverage. The inclusion of UK supply chains in the TSW (including inter-company transfers) may also cause further divergence from existing estimates. Inter-company transfers from Wales to other regions of the UK will be captured as domestic

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trade in TSW results, irrespective of whether the final customer location is international. This differs from the existing estimates which use data collected at the UK firm level, where sales to international customers will be captured as such and retrospectively apportioned to regions of the UK. Additionally, TSW only captures the top 5 countries that Welsh businesses export to rather than giving a comprehensive country split.

In 2021, TSW estimated the United States to be the top export partner with a £4.2bn export value (goods and services) from businesses in Wales. For the same country, ONS' estimates were broadly similar to TSW with a value of £4.4bn. HMRC's estimates only include goods and estimates a goods export value of £2.2bn for the United States. For TSW 2021 estimates, of the top 10 countries that Welsh businesses exported to, 7 were in the top 10 countries for HMRC goods estimates and 6 in the top 10 countries for ONS estimates.

Table 6: Comparison of international exports by country destination, 2021 (£ millions)

TSW country	TSW estimate	HMRC country	HMRC estimate [Note 1]	ONS country	ONS estimate [Note 2]
United States	4,188	Germany	2,420	United States inc Puerto Rico	4,441
France	2,481	United States	2,192	Germany	3,105
Germany	2,257	Ireland	1,729	Ireland	1,969
Switzerland	1,028	France	1,243	France	1,734

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TSW country	TSW estimate	HMRC country	HMRC estimate [Note 1]	ONS country	ONS estimate [Note 2]
China	988	Belgium	1,010	China	1,030
Netherlands	814	Netherlands	874	Spain	496
Ireland	386	China	608	Italy	466
Belgium	357	Spain	393	Switzerland	368
Italy	263	Turkey	336	Japan	359
Japan	189	Sweden	326	Hong Kong	338

Source: Trade Survey for Wales 2021 Welsh Government, HMRC, ONS

[Note 1] HMRC estimate includes goods only.

[Note 2] ONS estimates exclude suppressed countries.

TSW international import value estimates compared against other sources

The provisional TSW estimates of international goods import values for 2021 were £12.2bn in TSW, 51% (£6.2bn) coming from the EU and 49% (£6.0bn) coming from Non-EU countries. Comparatively, international goods imports were estimated to be £16.1bn and £15.4bn by HMRC and ONS respectively. HMRC estimated 37% (£5.9bn) was imported from the EU and 63% (£10.2bn) from

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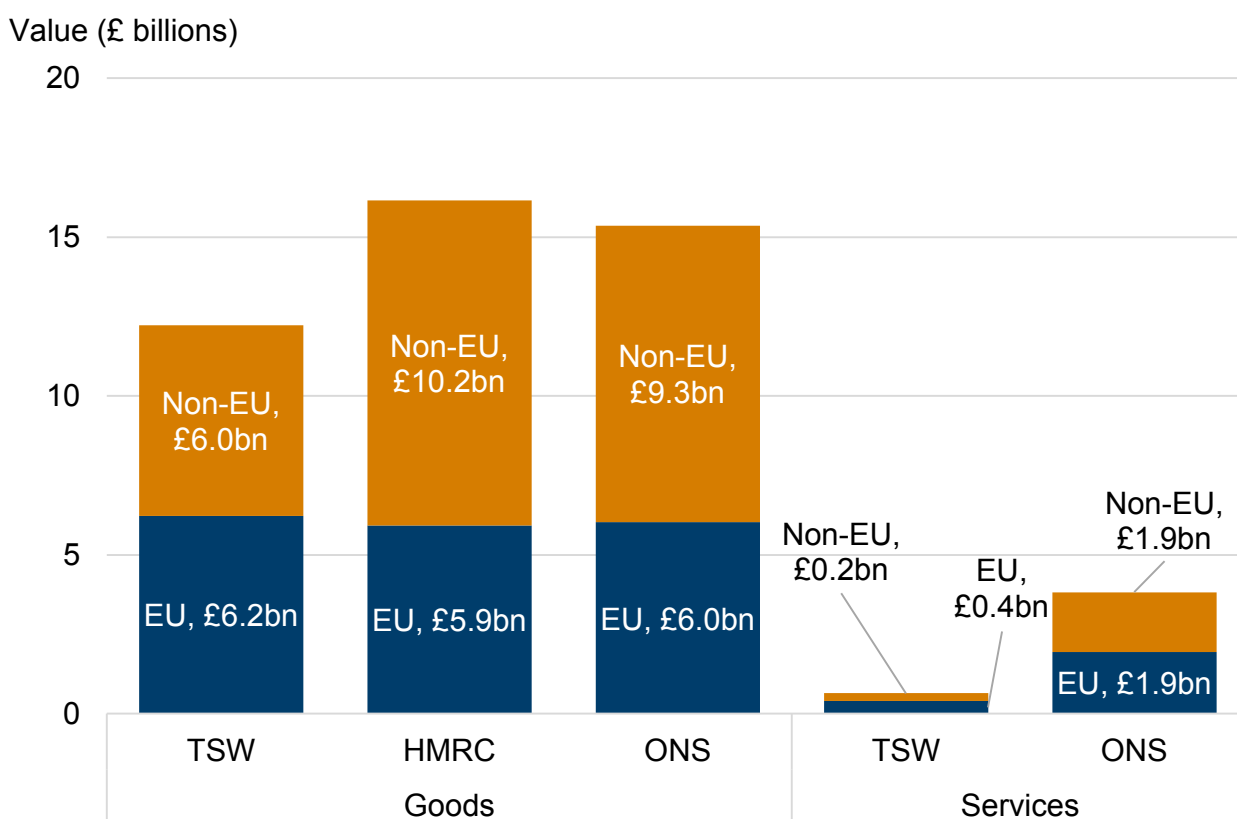
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Non-EU countries. Additionally, ONS estimated 39% (£6.0bn) was imported from the EU and 61% (£9.3bn) from Non-EU countries.

The provisional international service import values for 2021 were estimated to be £0.7bn in TSW, 62% (£0.4bn) coming from the EU and 38% (£0.2bn) coming from Non-EU countries. Comparatively, international service imports were estimated to be £3.8bn by ONS, with 51% (£1.9bn) imported from the EU and 49% (£1.9bn) to Non-EU countries. HMRC only produces estimates for goods.

Figure 33: TSW imports split by goods and services and by broad region compared against the other sources (£bn), 2021



Description of Figure 33: A clustered bar chart showing for 2021, TSW goods

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import estimates were lower than HMRC and ONS estimates and TSW services import estimates were lower than ONS estimates.

Source: Trade Survey for Wales 2021, Welsh Government

Table 7: TSW international imports compared against other sources (£ billions), 2021

	TSW	ONS	HMRC [Note 1]
EU goods	6.2	6.0	5.9
Non-EU goods	6.0	9.3	10.2
Total goods	12.2	15.4	16.1
EU services	0.4	1.9	[z]
Non-EU services	0.2	1.9	[z]
Total services	0.7	3.8	[z]

Source: Trade Survey for Wales 2021 Welsh Government, HMRC, ONS

[Note 1] The [z] symbol is used to denote data points that are not applicable.

Fieldwork information

Fieldwork for the fourth year of the survey was conducted between October

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2022 and January 2023, as shown in Table 8.

Table 8: Historic fieldwork dates for TSW

Year of survey	Data coverage period	Fieldwork period
Year 1	2017-2018	November 2019 to February 2020
Year 2	2019	October 2020 to January 2021
Year 3	2020	October 2021 to January 2022
Year 4	2021	October 2022 to January 2023

Source: Welsh Government

Quality and methodology information

These are 'official statistics in development' as the method employed is still in development, and there are some known data quality issues.

Our [QMI report](#) provides further detail of key quality and methodology information.

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,

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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 Well-being 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 but this release does not include national indicators.

Information on the indicators, along with narratives for each of the wellbeing goals and associated technical information is available in the [Wellbeing 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 wellbeing assessments and local wellbeing plans.

Footnotes

[1] See the [quality and methodology information](#) for what is included in each sector.

[2] The proportion is based off the total for all products recorded in the top 5 products question and not the total goods and services UK sales value.

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[3] The 1,390 responses include modelled across-years imputation responses, which is why it is higher than the Trade Survey in Wales, 2021 response rate.

[4] See [Eurostat's full definition of what is included in the environmental goods or services classification](#).

[5] All figures are provisional as they may be subject to future revisions.

[6] Sales have been subject to across-years imputation unlike purchases which will be more susceptible to year-on-year variations, so should be treated with additional caution.

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