



Sea transport, 2018

27 Nov 2019

SB 56/2019

Main points

Freight traffic at Welsh ports fell by 4.8 per cent in 2018 to 49.2 million tonnes (Mt). This is the lowest level since comparable records began in 1976 ([Chart 2](#)).

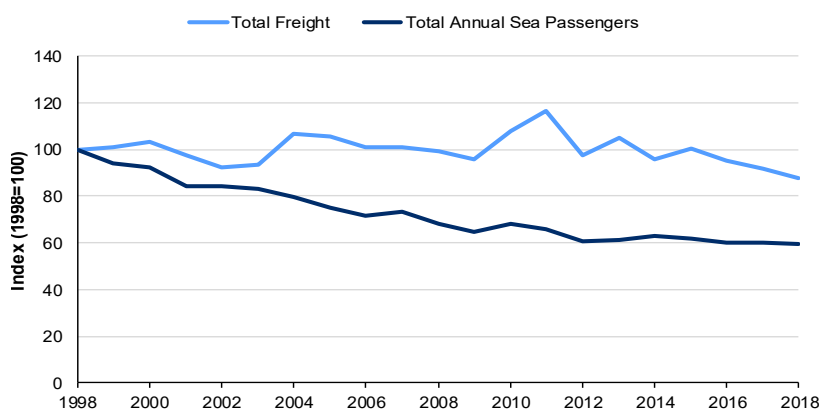
- Of traffic at major ports in Wales, 84.0 per cent was foreign traffic with 60.1 per cent being foreign imports. The majority of foreign imports and exports consisted of bulk products including crude oil, oil products, liquefied gas and ores.).



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

- Nearly three quarters of goods carried on Irish registered heavy goods vehicles (HGVs) between the Republic of Ireland and Europe passed through Welsh ports, equivalent to 0.4Mt. 71.0 per cent of this traffic passed through Holyhead port.

Chart 1: Movement of sea freight and passengers between Wales and Ireland, 1998 - 2018



Source: Department for Transport

- Over the long term, total sea passenger movement between the Republic of Ireland and Wales has declined.
- 75.5 per cent of passengers travelling between the Republic of Ireland and Wales in 2018 used the route between Holyhead and Dublin.

About this bulletin

This annual statistical bulletin sets out information about ports in Wales for 2018. 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](#).

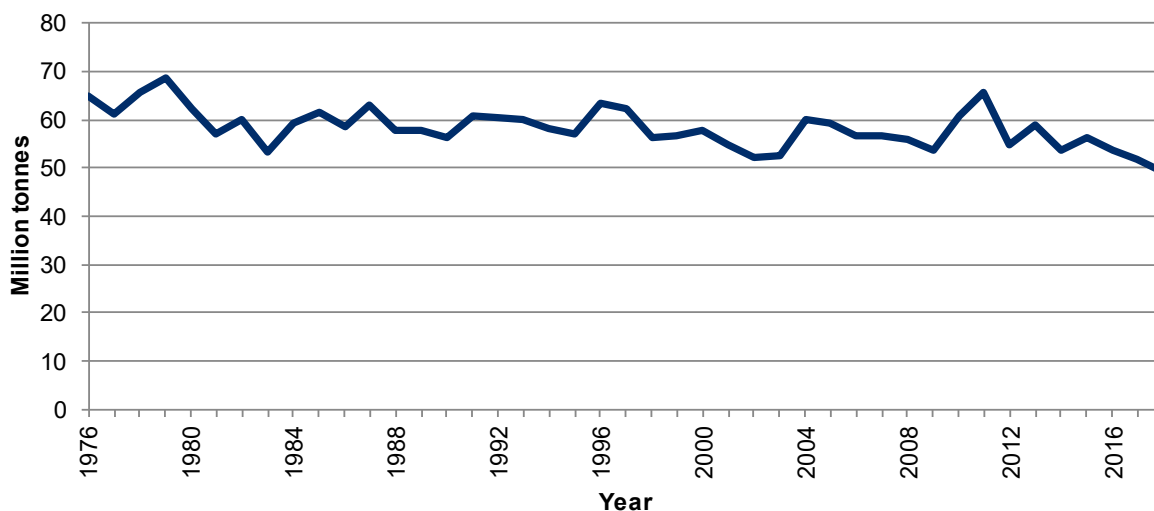
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Section 1: Sea freight

Total freight traffic through Welsh ports in 2018 was 49.2 million tonnes (Mt) (Chart 2). This has been gradually falling over the last 50 years and now stands at the lowest level since comparable records began in 1976.

Chart 2: Freight through Welsh ports, 1976 to 2018



Source: Department for Transport

Of the 49.2 Mt of freight through Welsh ports, 32.7 Mt were goods inwards and 16.5 Mt were goods outwards. Welsh ports accounted for 10.2 per cent of the total UK port traffic. The largest components of these flows were:

- oil products, with total traffic of 18.4 Mt, of which nearly 10.9 Mt was goods outwards. 3.6 Mt were sent to destinations elsewhere in the UK and 7.3 Mt were exported to the rest of the world.
- crude oil, with total traffic of 8.6 Mt, most of which was goods inwards. 0.1 Mt came from the rest of the UK and 8.3 Mt was imported from elsewhere in the world
- liquefied gas, with total traffic of 3.8 Mt.

The main ports in Wales

The three most important ports in Wales meet specialised shipping needs ([Map](#)):

- Milford Haven handles mainly crude oil, oil products and liquefied natural gas
- Port Talbot imports iron ore and coal mostly for the adjacent steelworks
- Holyhead is the main port for freight and sea passenger transport with the Irish Republic.

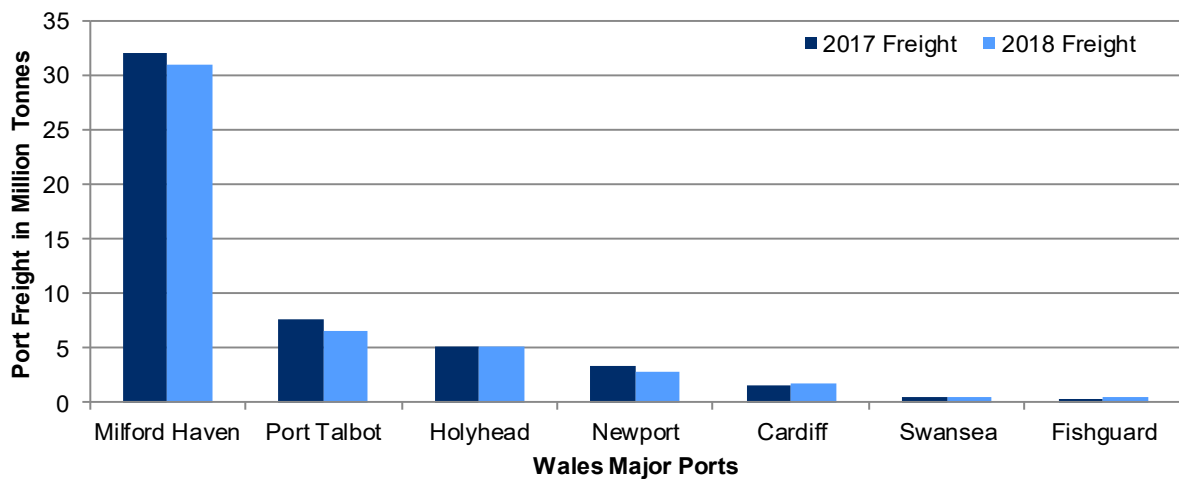
The other major ports include Fishguard, Swansea, Cardiff, and Newport ([Map](#)) and there are also a number of minor ports in Wales: Barry, Mostyn, Neath, Llanddulas, Port Penrhyn and Burry Port.

Map: Major sea ports locations in Wales, 2018



Milford Haven is the largest port in Wales and the fifth largest port in the UK by volume of freight, predominantly through oil and gas traffic. It handled 30.9 Mt of traffic in 2018, which was 6.4 per cent of the UK total for 2018. Freight traffic at Milford Haven accounts for 62.9 per cent of all Welsh port traffic. When compared with 2017, Milford Haven traffic decreased by 1.1 Mt (3.3 per cent) (see [StatsWales](#)) (Chart 3).

Chart 3: Wales's major ports total freight 2017 and 2018



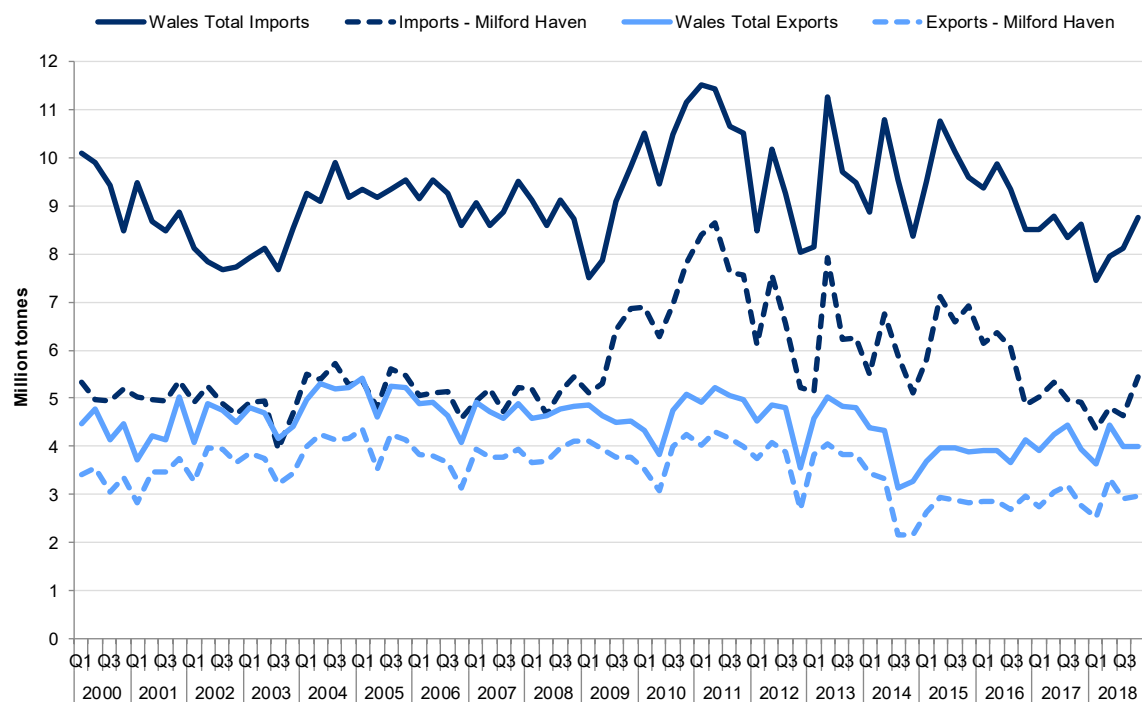
Source: Welsh Government analysis of Department for Transport data

Imports and exports

Figures for Wales largely reflect activity at Milford Haven. Imports to Milford Haven increased significantly from 2009 to 2011 and remained relatively high for a few years before falling again. In 2018 they were comparable to the levels seen between 2000 and 2009.

In 2018 Milford Haven saw a high of 5.45 Mt imports in quarter 4 and a low of 4.35 Mt imports in quarter 1. Exports from Milford Haven have been relatively stable in recent years with a 2018 high of 3.32 Mt exports in quarter 2 and a low of 2.52 Mt exports in quarter 1 (Chart 4).

Chart 4: Quarterly imports and exports from 2000 to 2018



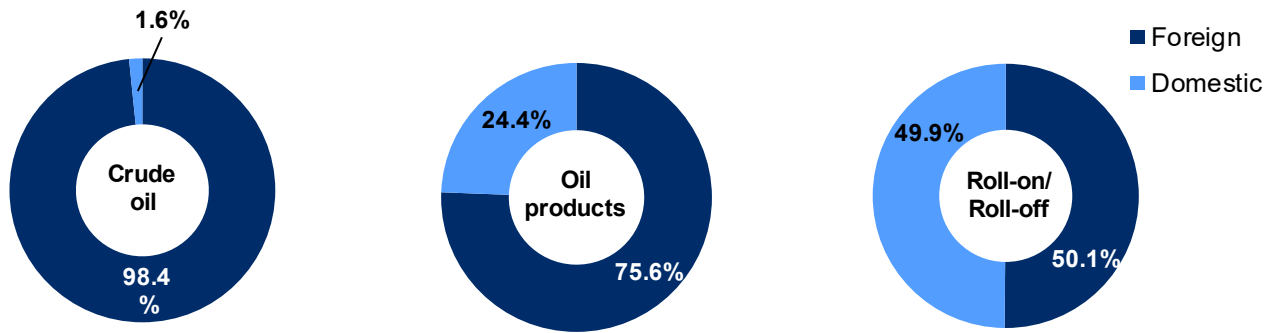
Source: Welsh Government analysis of Department for Transport data

Foreign and domestic traffic and cargo

Sea traffic refers to the number of ship arrivals and departures at a port whilst cargo refers to goods. In 2018, 84.0 per cent of traffic at major ports in Wales was foreign traffic with 60.1 per cent being foreign imports. Comparing domestic and foreign traffic:

- 98.4 per cent of crude oil traffic through the ports of Wales was for foreign imports and exports (96.5 per cent imports, 1.9 per cent exports). The remaining 1.6 per cent consisted of domestic traffic ([Chart 5](#)).
- Around three quarters (75.6 per cent) of oil products traffic was foreign traffic, of which 39.8 per cent was foreign exports and 35.8 per cent was foreign imports.
- For roll-on/roll-off traffic there was an even split between foreign and domestic cargo.

Chart 5: Domestic and Foreign Traffic at major Welsh ports, 2018



Source: Department for Transport

When looking at foreign imports and exports

- imports were higher than exports, with 31 Mt and 12 Mt respectively
- the majority of traffic was either liquid bulk (26 Mt) or dry bulk (8 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 4.3 per cent in 2018, whilst liquid bulk exports increased by 9.6 per cent compared with 2017. Dry bulk decreased during the same period.

Percentage change in foreign imports and exports of bulks at major ports in Wales between 2017 and 2018

Liquid bulk		Dry bulk	
18.7 million tonnes of foreign imports	7.7 million tonnes of foreign exports	7.2 million tonnes of foreign imports	0.4 million tonnes of foreign exports
4.3% ↓	9.6% ↑	11.2% ↓	36.7% ↓

Source: Department for Transport

More detail is available on [StatsWales](https://stats.wales.gov.uk/).

Freight movements to and from the Republic of Ireland through Welsh ports

- In 2018, 556,000 lorries and unaccompanied trailers passed through Welsh ports to and from Ireland. Around half came from Ireland and half travelled to Ireland. 81 per cent of this traffic went through Holyhead (see [StatsWales](#)).
- Welsh ports act as a gateway between the Republic of Ireland and the rest of Europe. Nearly three quarters (0.4 Mt) of goods carried on Irish registered HGVs between the Republic of Ireland and Europe pass through Wales. 71.0 per cent of this traffic passed through ports in North Wales though Holyhead port. (see [StatsWales](#) and Table 2).
- Of goods carried on Irish registered HGVs *from* the Republic of Ireland *to* the continent in 2018, 68.0 per cent went through Wales.
- Of goods carried on Irish registered HGVs *to* Ireland *from* the continent, 82.4 per cent went through Wales. The majority of this HGV traffic between Wales and the Republic of Ireland passed through Holyhead¹.

Table 2: Goods carried on Irish registered HGVs between the UK and the Republic of Ireland, 2018

	<i>Million tonnes of goods</i>			All
	Via North Wales ports	Via South Wales ports	Via other routes	
From Ireland to:				
Northern Ireland	~	~	2.4	2.4
UK ex N. Ireland	0.2	0.0	0.1	0.4
Continent	0.1	0.1	0.1	0.3
All	0.3	0.1	2.7	3.1
To Ireland from:				
Northern Ireland	0.0	0.0	1.5	1.5
UK ex N. Ireland	0.3	0.0	0.1	0.5
Continent	0.1	0.0	0.0	0.2
All	0.5	0.1	1.7	2.2

Note:

~ : Not applicable

Source: Central Statistical Office Ireland

Ports in Wales compared with the rest of the United Kingdom

For the UK as a whole, Grimsby and Immingham remained the UK's leading port in 2018 in terms of traffic tonnage, handling 55.6 Mt (11.5 per cent of UK traffic). It was followed by London with 53.2 Mt (11.0 per cent of UK traffic), and Southampton with 34.5 Mt (7.1 per cent of UK Traffic)². The Welsh port of Milford Haven was 5th, handling 30.9 Mt of freight (6.4 per cent of UK Traffic).

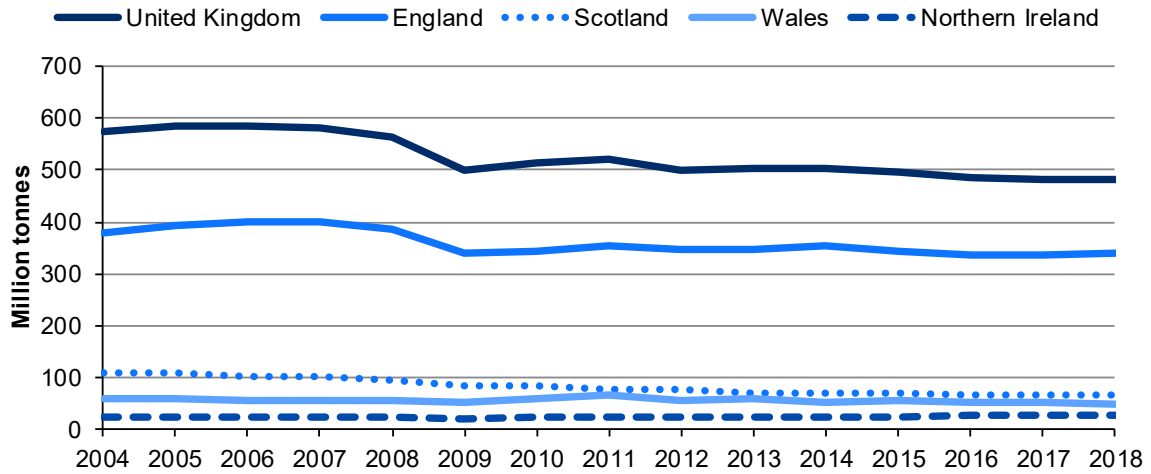
There was a slight downward trend between 2005 and 2009 in the volume of total sea traffic in Wales ([Charts 6a and 6b](#)). This coincided with a decrease in port traffic through the rest of the UK.

¹ Source: Central Statistical Office Ireland

² See [Department for Transport website](#)

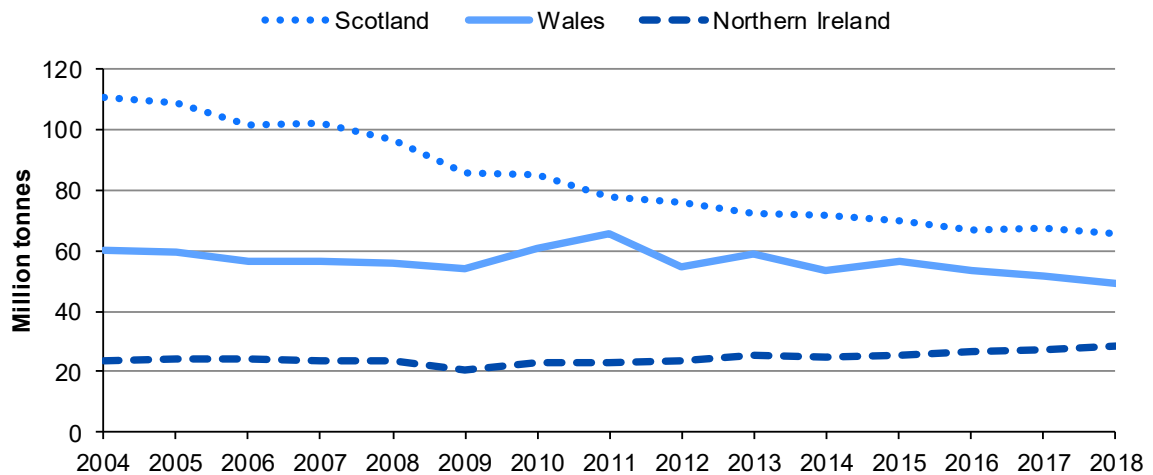
Since 2010 the amount of traffic has fluctuated annually in both Wales and the rest of the UK. Wales saw a peak in sea transport traffic during 2011 where a total 65.5 Mt passed through Welsh ports. At UK level, there has been a slight decrease since 2010. Scotland has continued to see decreases whereas freight in Northern Ireland has increased gradually since 2009.

Chart 6a: All port traffic through Wales and rest of UK, 2004 to 2018



Source: Department for Transport

Chart 6b: Port traffic through Wales, Scotland and NI, 2004-2018



Source: Department for Transport

Total freight traffic through UK ports in 2018 was 483.0 Mt (Table 1), a 0.3 per cent decrease on 2017, and 15.6 per cent below the 2004 level. Compared with 2017, inwards traffic increased by 3.1 per cent to 310.1 Mt and outwards traffic decreased by 4.3 per cent to 173.2 Mt. Wales was the only UK country to see decreases in both inwards and outwards traffic between 2017 and 2018.

Table 1: All port traffic, inwards and outwards, by UK country, 2013 to 2018

	<i>Million tonnes</i>		<i>Per cent</i>	
	2017	2018	% change 2017 to 2018	
England				
Inwards	231	240	4.2%	▲
Outwards	105	100	-4.8%	▼
All	336	340	1.4%	▲
Wales				
Inwards	35	33	-5.7%	▼
Outwards	17	16	-3.0%	▼
All	52	49	-4.8%	▼
Scotland				
Inwards	19	20	4.2%	▲
Outwards	48	45	-5.6%	▼
All	67	65	-2.8%	▼
Northern Ireland				
Inwards	17	17	3.7%	▲
Outwards	10	11	6.0%	▲
All	27	28	4.6%	▲
United Kingdom				
Inwards	301	310	3.0%	▲
Outwards	181	173	-4.2%	▼
All	482	483	0.3%	▲

Source: Welsh Government analysis of Department for Transport data

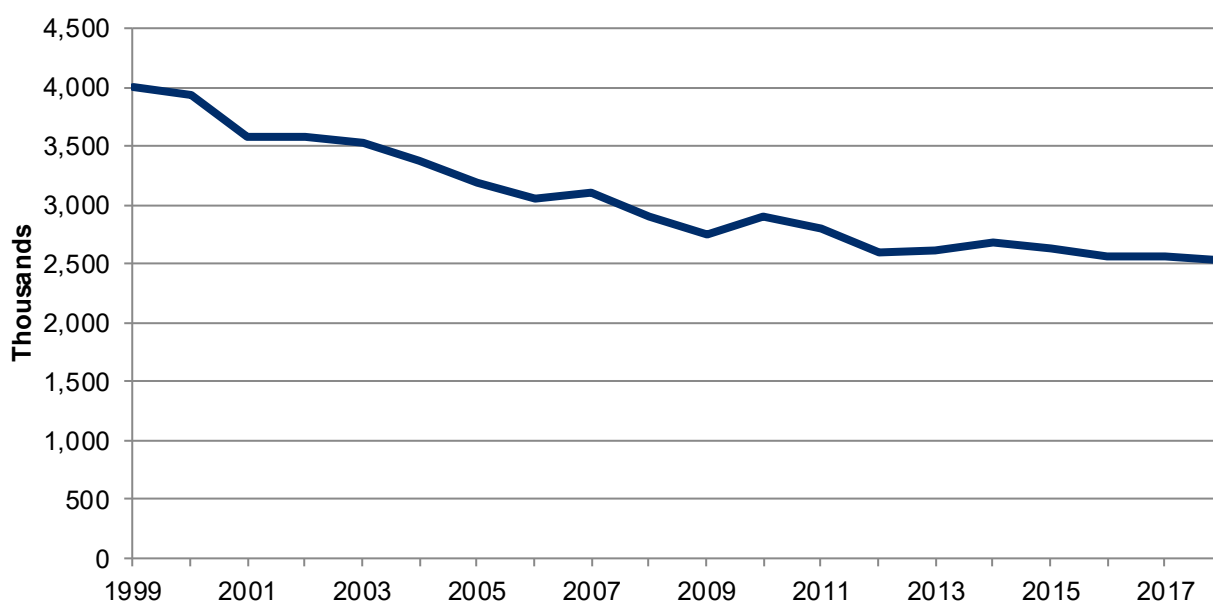
[StatsWales](#)

Section 2: Sea passengers

The number of ferry passengers using Welsh ports fell consistently from 1998 to 2012 and has remained roughly stable since ([Table 3](#)) (Chart 7).

The main Welsh ports used by passengers are Fishguard, Milford Haven and Holyhead. Since 1998, passenger movements between Ireland and Welsh ferry ports fell by 64 per cent at Fishguard, 36 per cent at Milford Haven and 31 per cent at Holyhead. Over the last year, sea passenger traffic through Holyhead, Fishguard and Milford Haven decreased by 0.4 per cent, 2.8 per cent and 4.5 per cent respectively.

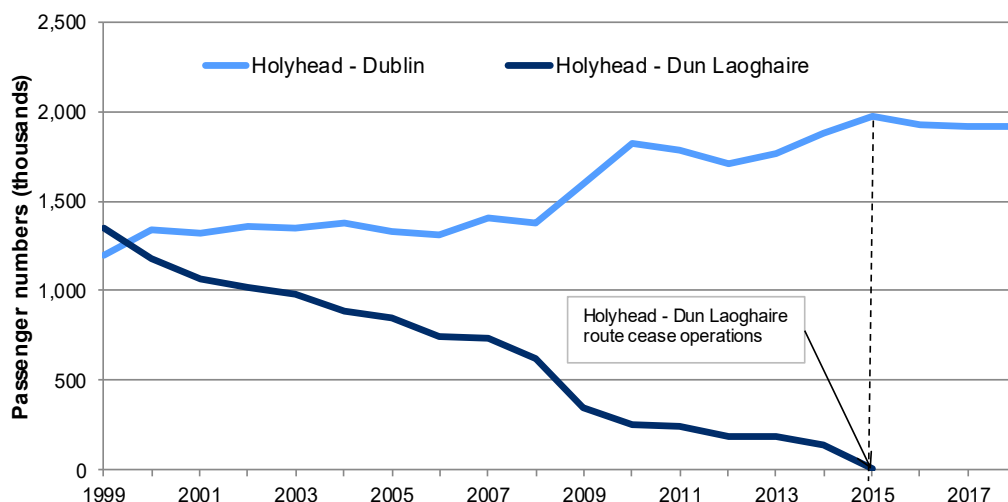
Chart 7: Sea Passengers between Wales and Irish Republic Ports, 1999 to 2018



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 the busiest in 1998 with over 1.7 million passenger movements, however following a consistent decline it was removed in 2015. Alongside this, the Holyhead to Dublin route saw an overall increase in passenger numbers from just over 1 million in 1998 to just over 1.9 million in 2018, an increase of 82 per cent. The number of passengers decreased from 1.92 million in 2017 to 1.91 million (0.4 per cent) in 2018 ([Chart 8](#)).

Chart 8: Passenger numbers between Holyhead and the Republic of Ireland



Source: Department for Transport

Table 3: Sea passenger traffic between (both to and from) Wales and the Irish Republic by port, 1998 to 2018 (a)(b)

	<i>Thousands</i>							Total Annual Sea Passengers
	Holyhead - Dublin	Holyhead - Dun Laoghaire	Holyhead - all routes	Mostyn - Dublin	Fishguard - Rosslare	Milford Haven - Rosslare	Swansea - Cork	
1998	1,051	1,724	2,775	-	810	512	158	4,255
1999	1,193	1,348	2,541	-	830	495	133	3,999
2000	1,342	1,176	2,518	-	832	463	124	3,937
2001	1,316	1,064	2,380	5	687	388	122	3,582
2002	1,354	1,017	2,371	44	662	387	121	3,585
2003	1,350	984	2,333	48	645	384	118	3,528
2004	1,376	887	2,262	10	614	378	116	3,380
2005	1,327	847	2,173	.	590	321	100	3,184
2006	1,311	745	2,057	.	584	333	81	3,055
2007	1,404	734	2,138	.	597	379	-	3,114
2008	1,374	622	1,996	.	554	345	-	2,895
2009	1,598	343	1,942	.	501	315	-	2,757
2010	1,821	252	2,073	.	419	325	94	2,910
2011	1,781	238	2,020	.	410	313	59	2,802
2012	1,709	189	1,898	.	364	329	.	2,591
2013	1,766	188	1,954	.	333	328	.	2,615
2014	1,875	139	2,013	.	351	322	.	2,686
2015	1,970	.	1,970	.	327	335	.	2,632
2016	1,927	.	1,927	.	298	339	.	2,564
2017	1,920	.	1,920	.	303	341	.	2,565
2018	1,914	.	1,914	.	295	326	.	2,534

Notes:

(a) Totals may not add up due to rounding.

(b) '-' nil or less than half the final digit shown, '.' data is not applicable

Source: Department for Transport

- In addition, just over 2.5 million sea passengers travelled between Wales and Ireland. 1.9 million of these passed through Holyhead with the remainder using the ports of Fishguard and Milford Haven (see [StatsWales](#)). There were also 689,000 accompanied passenger vehicles in 2018, representing a 1.6 percent decrease compared to 2017 figure.

Key quality information

1 Context

1.1 Related publications

The Department for Transport produces a range of [statistics relating to the maritime sector](#) presenting information on domestic waterborne freight, ports, sea passengers, shipping fleets and sea farers.

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.

1.2 Symbols

In tables where figures have been rounded to the nearest final digit, there may be an apparent discrepancy between the sum of the constituent items and the total shown.

The following symbols have been used throughout the bulletin:

- nil or less than half the final digit shown
- .
- not applicable

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-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 ro-ro 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 2017. 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 [statistics relating to the maritime sector](#) presenting information on domestic waterborne freight, ports, sea passengers, shipping fleets and sea farers.

National Statistics status

The [United Kingdom Statistics Authority](#) 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 [full assessment against the Code of Practice](#).

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 [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: <https://gov.wales/sea-transport-2018>

Next update

November 2020 (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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