

Pembrokeshire Coast National Park Authority

LOCAL DEVELOPMENT PLAN 3

(1 April 2025 – 31 March 2040)

Sustainability Appraisal (incorporating
Strategic Environmental Assessment)

Scoping Report Appendix B: Baseline information

Consultation: January 2026

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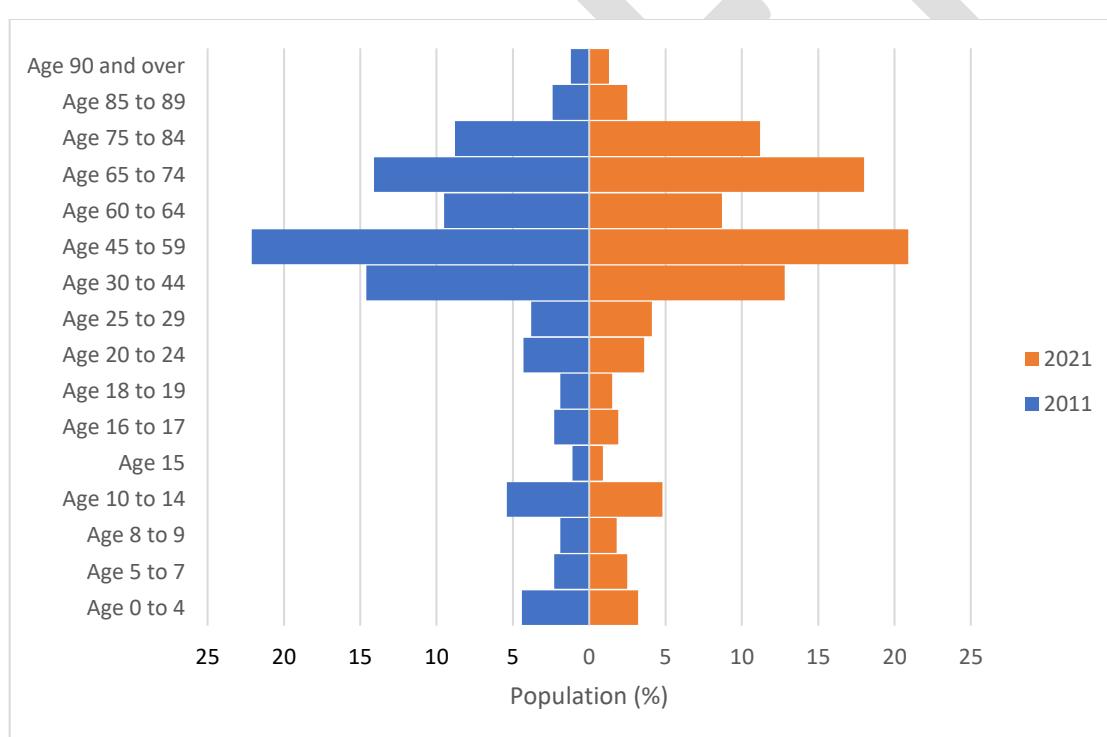
1 General & Population

1.1 Total population and trends

1.1.1 The resident population of the National Park at the 2021 census was found to be 20,933, a population decline of 7.6% on the 2011 Census (22,644) and the largest population decline of all of the National Parks in England and Wales between the two censuses.

1.1.2 The age structure of the National Park's usual resident population in the 2011 and 2021 census is shown in the chart below. There has been a decline in residents in all age categories aged 60 to 64 and below and an increase in all age categories aged over 65.

1.2 Population and Age

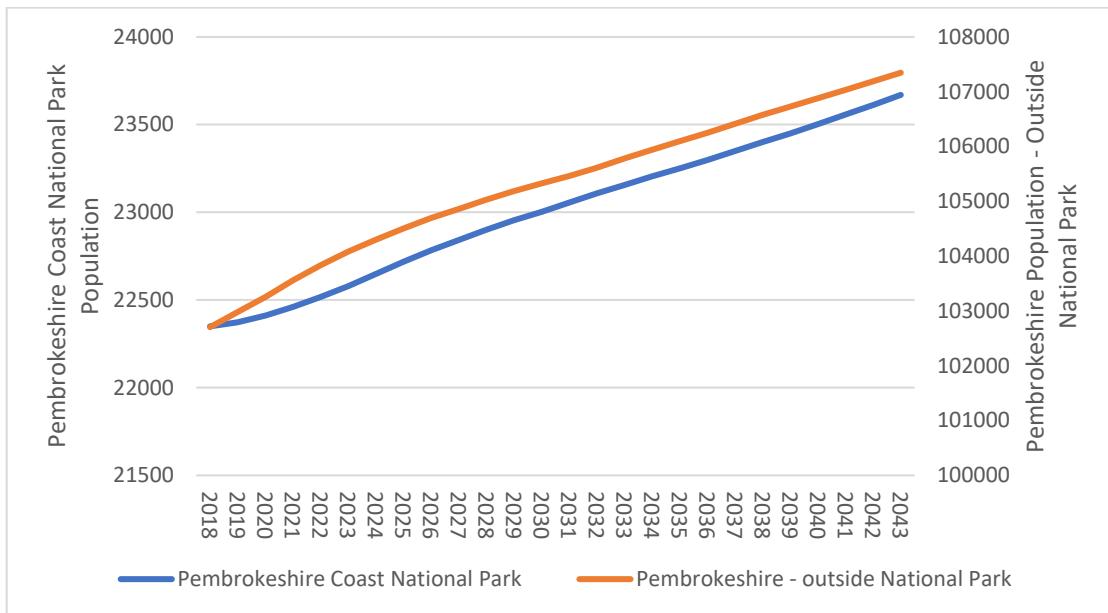


Data source: Census 2011/2021

1.2.1 The Census 2021 data indicates that over a third of the population (33.1%) of the National Park are aged 65 or older, compared to a Welsh average of 21.3%. With the National Park, 1.4% are aged 90 and over. The median age of residents was 54 years, the highest of the National Parks in Wales.

1.2.2 Population projections to 2043 have been prepared by Welsh Government, based on the 2018 mid-year population estimates, for the

National Park and the area of Pembrokeshire outside of the National Park. These are shown in the chart below:



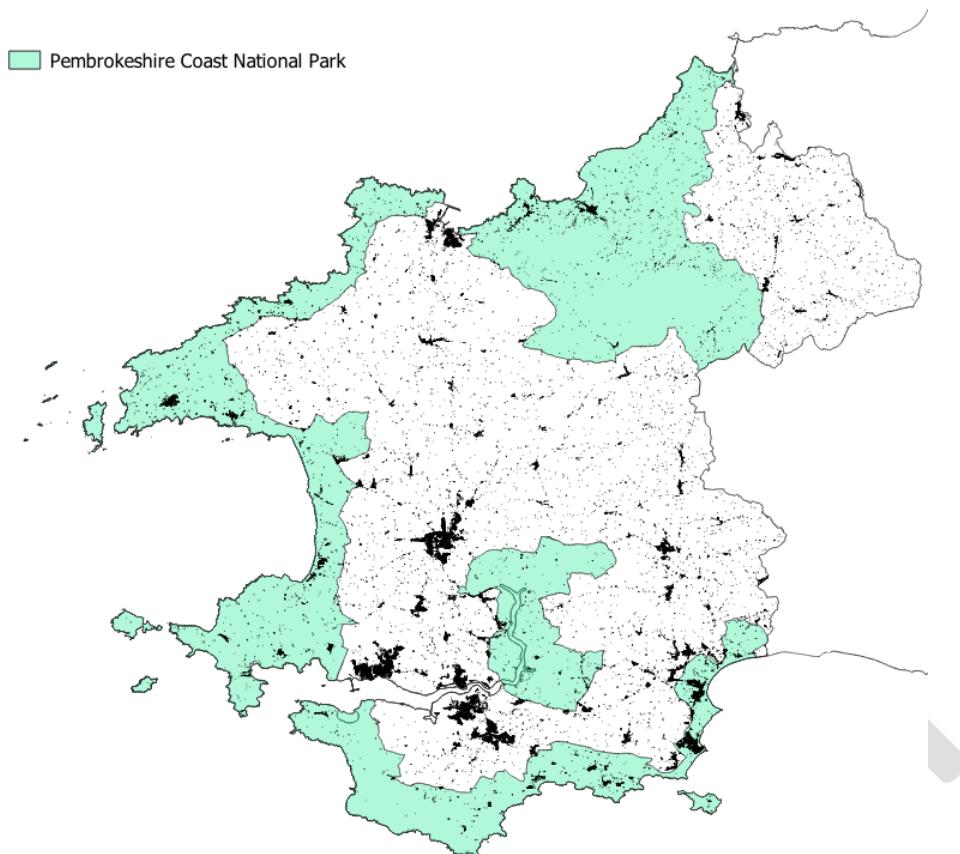
Data source: ONS/Welsh Government ([Population projections by year and national park \(gov.wales\)](https://gov.wales/population-projections-by-year-and-national-park))

1.2.3 As noted above, the population of the National Park is markedly lower than this projection. A population of approximately 22,460 was predicted in this model compared to the figure of 20,933 found in the 2021 census. Further population projections based on the 2021 census or more recent mid-year estimates are expected.

1.3 Population distribution

1.3.1 The following map shows the settlement pattern of the National Park and surrounding areas of Pembrokeshire, Carmarthenshire and Ceredigion. Each dot indicates an address in the Ordnance Survey's Address Point dataset¹ for July 2025.

¹ © Crown copyright and database rights Ordnance Survey AC0000810561



1.3.2 The distribution of points on this map suggests that even outside towns and villages the National Park is well populated with only a few significant unpopulated areas, i.e. Preseli Hills and Castlemartin Range.

1.4 Migration

1.4.1 Migration data derived from Health Authority records indicates a net migration inflow to Pembrokeshire from the rest of the UK.

Year	Wales Net	Pembrokeshire Inflow	Pembrokeshire Outflow	Pembrokeshire Net
2012-2013	-1,875	3930	3630	300
2013-2014	-108	4090	3630	460

Year	Wales Net	Pembrokeshire Inflow	Pembrokeshire Outflow	Pembrokeshire Net
2014-2015	-1,233	3720	3680	40
2015-2016	2,258	4410	3680	730
2016-2017	5,787	4424	3669	755
2017-2018	6,912	4410	3794	616
2018-2019	7,391	4779	3651	1128
2019-2020	26,281	4174	2859	1315
2020-2021	9,415	5,596	3,744	1,852
2021-2022	10,652	4,578	3,497	1,081

[StatsWales: Migration between Wales and the rest of the UK by local authority, flow and period of change](#)

1.5 Sex

Sex	Pembrokeshire (%)	Pembrokeshire Coast National Park (%)	Wales (%)
Female	51.3	51.4	51.1
Male	48.7	48.6	48.9

Data source: Census 2021 [Nomis - Query Tool - TS008 - Sex](#)

1.6 Ethnicity

Ethnic group	Pembrokeshire Coast National Park (%)	Pembrokeshire (%)	Wales (%)
Asian, Asian British or Asian Welsh	0.7	0.9	2.9
Black, Black British, Black Welsh, Caribbean or African	0.1	0.2	0.9
Mixed or Multiple ethnic groups	0.8	0.9	1.6
White	98.1	97.6	93.8
Other ethnic group	0.3	0.3	0.9

Data source: Census 2021 [Nomis - Query Tool - TS021 - Ethnic group](#)

1.6.1 The population of the National Park is predominantly white. 98.1% of the population are white, which is higher than Pembrokeshire (97.6%) and substantially higher than Wales as a whole (93.8%).

1.7 Sexual orientation

Sexual orientation	Pembrokeshire (%)	Wales (%)
Straight or Heterosexual	89.8	89.4
Gay or Lesbian	1.1	1.5
Bisexual	1.0	1.2
All other sexual orientations	0.2	0.3
Not answered	7.9	7.6

Data source: Census 2021 [Nomis - Query Tool - TS077 - Sexual orientation](#)

The figures from the 2021 census for sexual orientation are broadly in line with the Welsh averages.

1.8 Gender identity

Gender identity	Pembrokeshire (%)	Wales (%)
Gender identity the same as sex registered at birth	93.4	93.3
Gender identity different from sex registered at birth but no specific identity given	0.1	0.2
Trans woman	0.1	0.1
Trans man	0.1	0.1
All other gender identities	0.1	0.1
Not answered	6.3	6.3

Data source: Census 2021 [Nomis - Query Tool - TS078 - Gender identity](#)

1.8.1 At the 2021 Census, the statistics for gender identity in Pembrokeshire were broadly in-line with Wales as a whole.

1.9 Religion

Religion	Pembrokeshire Coast National Park (%)	Pembrokeshire (%)	Wales (%)
No religion	39.0	43.0	46.5
Christian	52.9	48.8	43.6
Buddhist	0.4	0.4	0.3
Hindu	0.1	0.1	0.4
Jewish	0.1	0.0	0.1
Muslim	0.3	0.5	2.2
Sikh	0.0	0.0	0.1
Other religion	0.6	0.6	0.5
Not answered	6.5	6.6	6.3

Data source: Census 2021 [Nomis - Query Tool - TS030 - Religion](#)

1.9.1 Christianity is the dominant religion in the National Park (52.9%), where there is a higher proportion of Christians than Pembrokeshire (48.8%) and Wales (43.6) as a whole.

1.10 Marital Status (Living arrangement)

Living arrangements	Pembrokeshire Coast (%)	Pembrokeshire (%)	Wales (%)
Living in a couple: Married or in a civil partnership	49.7	46.5	43.3
Living in a couple: Cohabiting	11.8	13.3	14.2
Not living in a couple	38.4	40.2	42.4

Data source: Census 2021 [Nomis - Query Tool - TS010 - Living arrangements](#)

General & Population Summary

- The population of the National Park declined by 7.6% between the 2011 and 2021 censuses, the largest decline of all the National Parks in England and Wales.
- The National Park has an aging population. The median age is 54 and approximated one third of the population is aged 65+.
- The National Park is predominantly white (98.1%), with a higher proportion than Pembrokeshire (97.6) and a significantly higher proportion than Wales (93.8%) as a whole.

2 Housing

2.1 Housing Stock Profile

Number of Households²: 9,781

Accommodation type	Census 2021	
	number	%
Total	9,781	100.0
Detached	4,864	49.7
Semi-detached	2,491	25.5
Terraced	1,206	12.3
In a purpose-built block of flats or tenement	741	7.6
Part of a converted or shared house, including bedsits	180	1.8
Part of another converted building, for example, former school, church or warehouse	72	0.7
In a commercial building, for example, in an office building, hotel or over a shop	149	1.5
A caravan or other mobile or temporary structure	78	0.8

Census 2021 - [TS044 - Accommodation type](#)

2.2 Housing stock

Tenure of household	Pembrokeshire Coast National Park (%)	Pembrokeshire (%)	Wales (%)
Owned	70.5	67.0	66.1
Owned: Owns outright	52.0	44.4	38.0
Owned: Owns with a mortgage or loan	18.5	22.6	28.0
Shared ownership	0.3	0.3	0.3
Shared ownership: Shared ownership	0.3	0.3	0.3
Social rented	12.4	16.2	16.5
Social rented: Rents from council or Local Authority	8.0	10.3	8.7

² Census 2021, [Nomis - Query Tool - TS041 - Number of Households](#)

Social rented: Other social rented	4.4	6.0	7.8
Private rented	16.7	16.4	17.0
Private rented: Private landlord or letting agency	12.5	13.1	14.5
Private rented: Other private rented	4.2	3.3	2.5
Lives rent free	0.1	0.1	0.2
Owns with a mortgage or loan or shared ownership	18.8	22.9	28.4
Private rented or lives rent free	16.7	16.5	17.1

Source: 2021 Census, [Nomis - Query Tool - TS054 - Tenure](#)

2.2.1 The following table summarises the composition of households resident in the National park between the 2011 and 2021 Censuses.

Year	All households	One person households	Single family households with dependent children	Single family household: No Children	Other household types: all
2011	10,277	3,386	2255	2009	342
2021	9,779	3,363	1634	1771	473
Change	-498	-23	-621	-238	+131

Source: 2021 and 2011 Census

2.3 Housing for Older Persons

2.3.1 The 2021 Census showed in Pembrokeshire the proportion of those aged 65 and over living in a communal establishment fell from 3.7% in 2011 to 2.9% in 2021

2.3.2 Source: 2021 and 2021 Census (Tables: TS047 - Communal establishment residents by age and sex (Census 2021), DC4210EWLA - Communal establishment management and type by sex by age (Census 2011)).

2.4 Completions of market and affordable housing

2.4.1 Affordability of housing is a key issue for the National Park, with market house prices significantly higher than those in the wider county. The number of completions of affordable housing units (predominantly social rented, has been good over the course of the current LDP, inline with the plan's targets and higher than historic levels; the following table shows the completions of market and affordable housing for comparison.

Year	Overall Completions	Affordable
2015 - 2016	46	1
2016 -2017	69	46
2017 - 2018	37	3
2018 - 2019	67	14
2019 - 2020	77	25
2020 - 2021	103	39
2021 - 2022	92	38
2022 – 2023	35	17
2023 – 2024	52	27
2024 – 2025	55	22
Total	526	183

Data source: PCNPA housing trajectory

2.5 Housing need

2.5.1 Pembrokeshire County Council Housing Department maintains the waiting list for social housing for the County; from this the Local Housing Market Assessment (LHMA) is prepared. The most recent Pembrokeshire LHMA 2023 indicates the following need for the County by tenure:

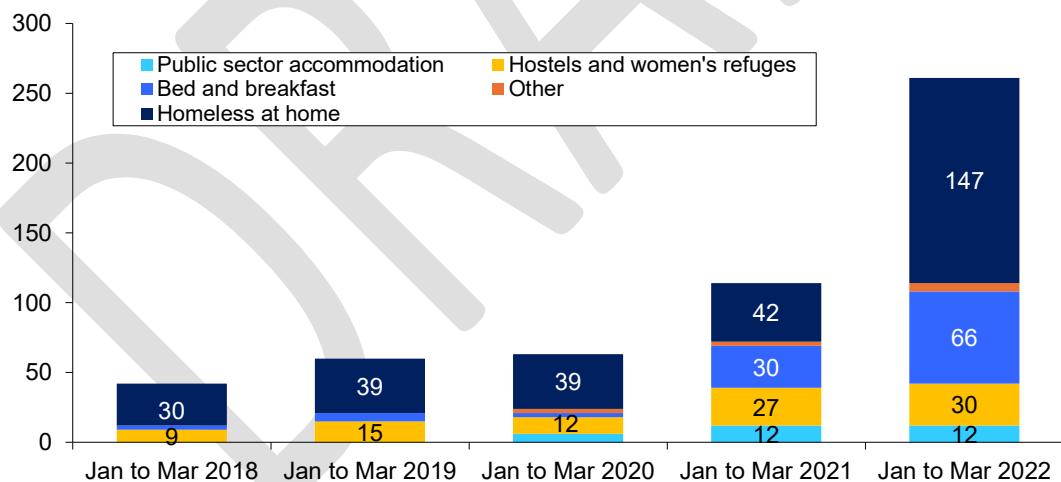
Annual requirement for affordable housing from households in current need in Pembrokeshire (Headline 15 Year Estimate)

Location	Social Rent	Intermediate Rent and LCHO	Affordable Housing
National Park	190	81	271
Non-National Park	2,152	631	2,783
Whole of Pembrokeshire	2,342	712	3,054

Source: Pembrokeshire Council Housing Register, 2024; CACI household income profile for Pembrokeshire, 2024, Pembrokeshire Local Housing Market Assessment 2023⁵³

2.6 Homelessness

2.6.1 Data collated for the Local Housing Market Assessment 2023 indicates that homelessness rose between 2018 and 2022.



Source: LHMA 2023 - Households accommodated temporarily by accommodation type and household type, Welsh Government, 2023.

2.7 Second and holiday homes

2.7.1 At the 2011 Census the Pembrokeshire Coast National Park had one of the highest percentages of households with “no usual resident” in

England & Wales. This is indicative of second residences or holiday homes. The following table shows numbers of households with no usual resident in the National Park, Pembrokeshire and Wales. This data is not available from the 2021 Census.

Area	All Household spaces	Number second/holiday homes	Percent second/holiday homes
PCNP	14,207	3,937	27.7%
Pembrokeshire	60,668	7,590	12.5%
Wales	1,383,814	82,845	6%

Data source: 2011 Census

2.7.2 In Wales, Pembrokeshire has the second highest number of second homes after Gwynedd. Welsh Government's change to the days let thresholds in order to qualify for non-domestic rates is impacting on the statistics for both second homes and short term lets.

2.8 Second Homes

Year	Oct-17	Oct-18	Oct-19	Oct-20	Oct-21	Oct-22	Oct-23	Oct-24	Aug-25
Second homes subject to Premium	3,889	3,787	3,719	3,655	3,641	3,574	3,411	3,224	3,612
Exceptions to premium	137	396	467	443	377	422	540	670	847
Total number of second homes	4,026	4,183	4,186	4,098	4,018	3,996	3,951	3,894	4,459

2.9 Self-Catering Units (Non-Domestic Rates)

Year	2017	2018	2019	2020	2021	2022	2023	2024	2025
Number of self-catering units	1,365	1,709	1,896	2,049	2,282	2,474	2,650	2,417	1,799

2.10 Long-Term Empty Properties

Property Type	2024 Number of Properties	2025 Number of Properties
Unoccupied, unfurnished and undergoing renovation (max 12 months) – Class A	167	193
Unoccupied and unfurnished (max 6 months) – Class C	572	556
Empty 100% charge (after class A or C exemption)	701	719
Empty premium exception – Class 1*	54	64
Empty premium exception – Class 2**	1	8
Empty premium exception – Class 3***	10	11
Empty premium exception – Class 4****	0	0
Long term empty properties premium	100% - 320 200% - 96 300% - 171	300% - 465

Class Definitions:

* Class 1: Dwellings being marketed for sale

** Class 2: Dwellings being marketed for let

*** Class 3: Annexes forming part of, or being treated as part of the main dwelling

**** Class 4: Dwellings which would be someone's sole or main residence if they were not residing in armed forces accommodation

2.10.1 Main considerations:

- The number of properties subject to the Council Tax premium has increased due to properties being removed from the non-domestic rating (NDR) list to Council Tax, with some still under appeal to the Valuation Office Agency (VOA).
- The number of self-catering units has fallen, dropping from 2,046 in April 2025 to 1,799 by August 2025, primarily due to VOA reviews and revised letting thresholds.
- There is a slight drop in the total number of second homes and holiday lets from 2024-25, with numbers stabilizing after Council Tax premium changes.
- One in eight properties that moved into Council Tax remain holiday lets and receive the Class 6 exception to the Council Tax premium due to planning occupancy restrictions.
- The property market is dynamic: 426 properties moved to Council Tax from non-domestic rates between April 2025 and August 2025, while 80 moved the other way.
- The number of long-term empty properties subject to the Council Tax premium has decreased from 550 in April 2025 to 474 by September 2025.
- Average Band D second homes Council Tax premium (including town and community Council and police precept) is currently £3,089.73 for 2025-26.
- Average Band D long-term empty property Council Tax premium (including town and community Council and police precept) is currently £6,176.46 for 2025-26.
- The presence of a significant number of second homes and long-term empty properties affects Pembrokeshire's population statistics, reducing the Authority's funding through service requirements distribution compared to if these were standard homes for local families.

Source: Pembrokeshire County Council - [Cabinet Report Review of Council Tax Premiums and Discretionary Discount Policy](#)

2.10.2 Data from Council Tax and the application of Non-Domestic Rates can be used estimate the percentage of second homes and holiday lets more regularly and more accurately. The table below shows the estimated

percentage of second homes and holiday lets within the centres in the National Park as defined by Local Development Plan 2:

Centre Name	Estimated Percentage - Second and Holiday Homes
Amroth	46
Angle	18
Bosherston	25
Broad Haven	30
Carew	0
Castlemartin	4
Cosheston	0
Cosheston	0
Crymych	0
Dale	35
Dinas Cross	13
Felindre Farchog	5
Herbrandston	4
Hook	0
Houghton	0
Jameston	6
Lamphey	0
Lawrenny	27
Little Haven	51
Lydstep	14
Manorbier	12
Manorbier Station	0
Marloes	28
Milton	0
Moylegrove	17
New Hedges	8
Newgale	30
Newport	30
Nolton Haven	54
Porthgain	24
Roch	33
Rosebush	9
Saundersfoot	28
Solva	19
Square & Compass	13
St David's	18
St Ishmael's	10
Tenby	28
Trefin	25
Wiseman's Bridge	29

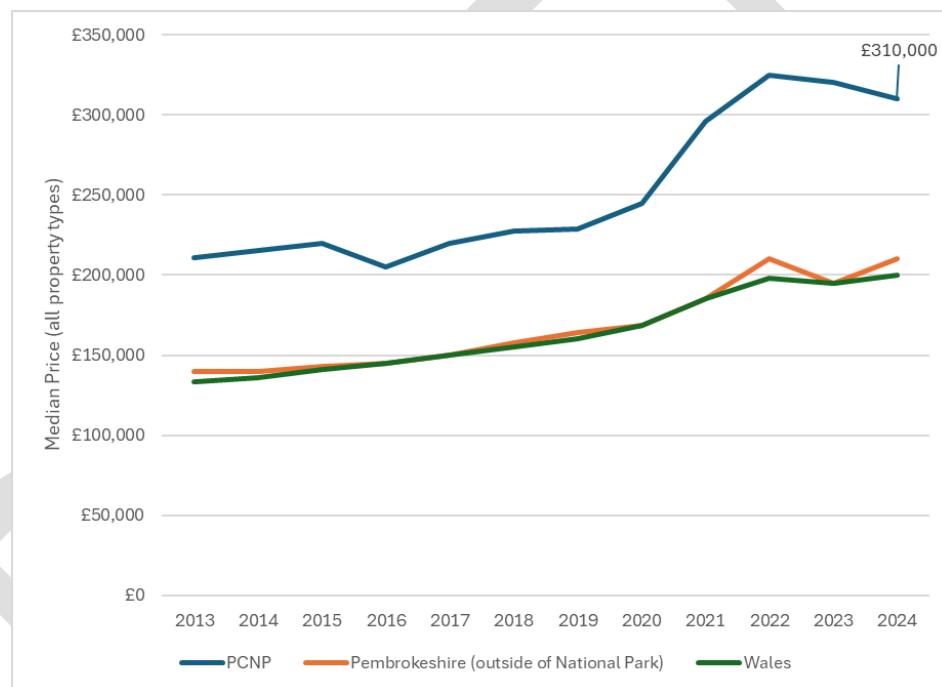
Source: Pembrokeshire County Council 2025

2.10.3 This data would suggest that, in many cases, the percentage of second homes and holiday lets is significantly higher than the census average would suggest.

2.11 House prices

2.11.1 House prices in the National Park have increased sharply since 2013, and are consistently higher than those for Pembrokeshire as a whole and Wales. The following chart shows the change in median price paid for all types of housing in the National Park and comparators.

2.11.2 In 2024 the median average price of a house in The National Park was 9.28 times the median average annual earnings of employees.



Median prices for all types of housing 2013 to 2024 calendar years for Pembrokeshire Coast National Park, the area of Pembrokeshire outside of the National Park and the whole of Wales. (Data Source: Land Registry Price Paid)

Housing Summary

- There are 9,781 households in the National Park.
- The majority of the houses in the National Park are detached and owner occupied.
- Second homes and holiday lets are an issue for the National Park, with some communities e.g. Little Haven and Amroth having rates that exceed 45%.
- House prices in the National Park are consistently higher than Pembrokeshire and Wales, with the median house price being 9.28 times the median annual earnings in Pembrokeshire in 2024.

3 Health

3.1.1 Generally, the health of people in Pembrokeshire is similar to that for Wales as a whole.

3.1.2 At the 2021 Census 45.7% of people living in the National Park reported to have very good health 0.5% lower than the overall figure for Wales and 1% higher than the figure for Pembrokeshire as a whole.

General Health	Pembrokeshire Coast	Pembrokeshire	Wales
Very Good Health (%)	45.7	44.7	46.2
Good Health (%)	33.5	33.4	32.4
Fair Health (%)	14.6	15.1	14.5
Bad Health (%)	4.8	5.2	5.3
Very Bad Health (%)	1.5	1.6	1.7

Data source: Census 2021 [Nomis - Query Tool - TS037 - General health](#)

3.1.3 The proportion of people disabled under the Equality Act at the 2021 Census in the National Park is lower than both the Pembrokeshire as a whole and Wales as a whole. However, it is noted that the National Park does have a higher proportion of residents that have a long term condition that does not affect them day-to-day than Pembrokeshire and Wales.

Disability	Pembrokeshire Coast National Park (%)	Pembrokeshire (%)	Wales (%)
Disabled under the Equality Act	21.0	22.0	21.6
Disabled under the Equality Act: Day-to-day activities limited a lot	9.2	10.2	10.3
Disabled under the Equality Act: Day-to-day activities limited a little	11.8	11.9	11.3

Not disabled under the Equality Act	79.0	78.0	78.4
Not disabled under the Equality Act: Has long term physical or mental health condition but day-to-day activities are not limited	7.3	6.6	6.6
Not disabled under the Equality Act: No long term physical or mental health conditions	71.7	71.4	71.8

Data source: Census 2021 [Nomis - Query Tool - TS038 - Disability](#)

Measure	Pembrokeshire (%)	Wales Average (%)
Obese adults	25	25
Obese children (4-5 years old)	10.9	11.4
Obese or overweight adults	57	62
Obese or overweight children (4-5 years old)	27.9	24.8
Adults meeting CMO guidelines for physical activity	18.8	18.3
Children (11-16) meeting CMO guidelines for physical activity	50	46.5
Adults eating at least 5 portions of fruit and/or vegetables per day	25.6	28.5
Young people (11-16) eating at least 1 portion of fruit or vegetable	50	46.5
Current smoker (Adults)	12	13
Drinking above recommended guidelines (Adults)	21	16

3.1.4 An important role of National Parks is to provide opportunities for outdoor recreation and exercise, as a result of this National parks can make a significant contribution to public health. The literature³ suggests that there are 5 key ways in which exposure to the natural environment is beneficial to human health. These are:

- Enhanced personal and social communication skills.
- Increased physical health.
- Enhanced mental and spiritual health.
- Enhanced spiritual, sensory, and aesthetic awareness.
- Ability to assert personal control and increased sensitivity to one's own well-being.

Health Summary

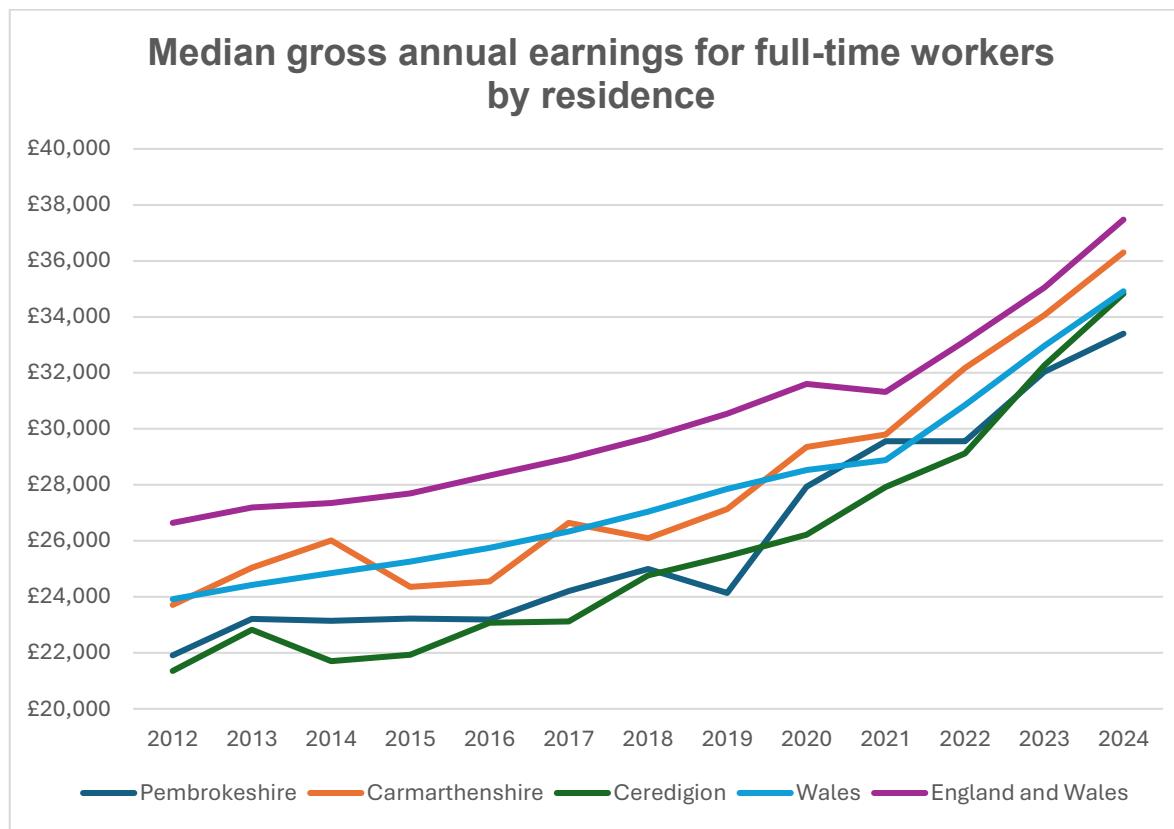
- **45.7% of residents of the National Park reported having “Very good health” at the 2021 Census, slight lower than the Welsh average (46.2%) and slightly higher than the Pembrokeshire average (44.7%). Residents reporting “bad” or “very bad” health is slightly lower than the national average.**
- **At the 2021 Census, 21% of National Park residents were disabled – lower than Pembrokeshire (22%) and Wales (21.6%).**
- **Rates at which children are overweight or obese between 4 and 5 years old in Pembrokeshire are higher than the national average.**
- **The consumption of alcohol among adults is higher than the then national average.**

³ Literature review conducted for OPENspace: the research centre for inclusive access to outdoor environments. Morris N. (2003) *Health, Well-Being and Open Space Literature Review* (available at [Open Space: Morris, N. \(2003\) Health, Well-Being and Open Space Literature Review](http://Open%20Space%3A%20Morris,%20N.%20(2003)%20Health,%20Well-Being%20and%20Open%20Space%20Literature%20Review), accessed 16 February 2007)

4 Income & Employment

Year	Pembrokeshire	Carmarthenshire	Ceredigion	Wales	England and Wales
2012	21911	23712	21354	23918	26643
2013	23208	25045	22822	24427	27189
2014	23141	26015	21698	24848	27346
2015	23220	24354	21937	25254	27693
2016	23184	24551	23074	25755	28340
2017	24210	26641	23120	26339	28953
2018	24992	26098	24772	27043	29684
2019	24134	27133	25455	27858	30537
2020	27934	29356	26223	28530	31600
2021	29562	29795	27919	28886	31319
2022	*	32177	29119	30846	33135
2023	32036	34067	32270	32963	35046
2024	33401	36302	34828	34915	37474

Median gross annual earnings for full-time workers by residence (NOMIS 2025)

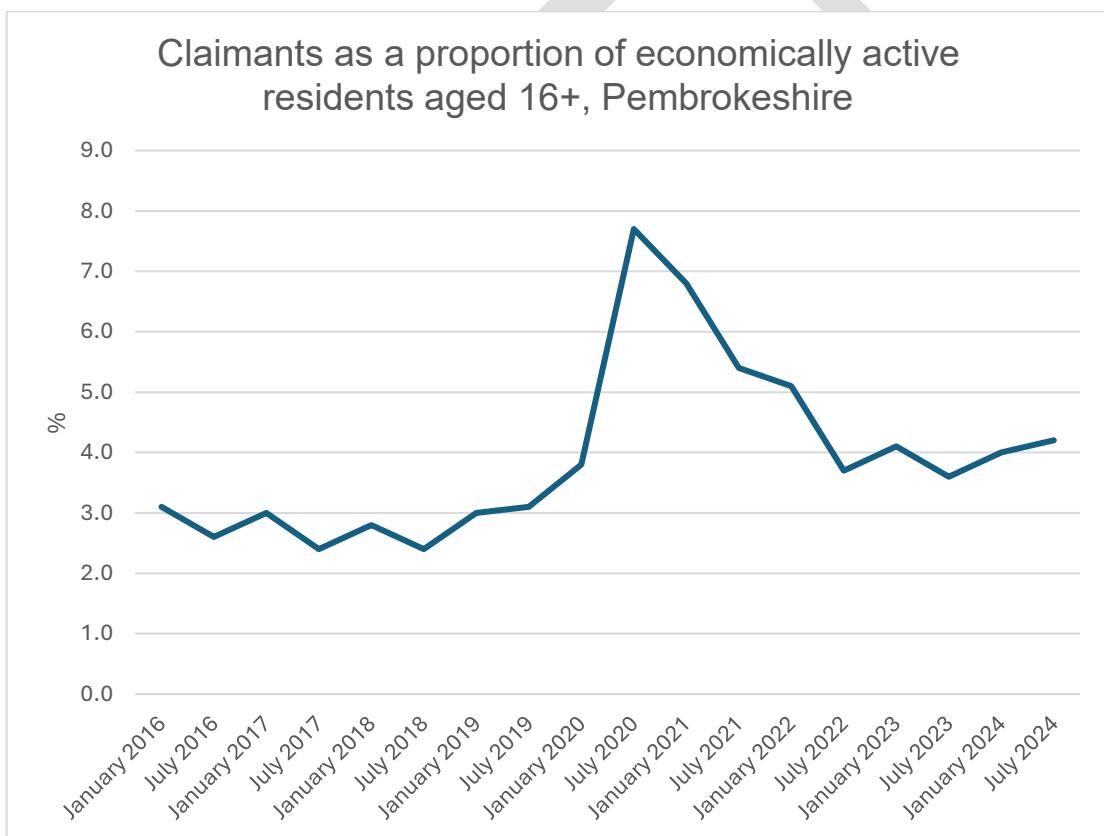


Full-time workers in Pembrokeshire generally earn less than the average earnings for full-time workers in Wales and England and Wales.

4.1 Unemployment rates

4.1.1 The graph below illustrates the proportion of working-age individuals in Pembrokeshire who are economically active and claiming unemployment benefits. Up until 2020, the data shows a gradual decline in the number of claimants. However, there was a sharp increase in 2020, most likely due to the impact of the COVID-19 pandemic. Although claimant rates have since decreased to around 4%, they remain above pre-pandemic levels.

4.1.2 The seasonal nature of Pembrokeshire's tourism industry is also reflected in the data, with noticeable dips in claimant rates during the peak summer months, particularly in July.



Data source: Office for National Statistics (Nomis)

4.2 Employment rates

4.2.1 Though unemployment rates are declining and favourable in comparison with other parts of the UK, the rates of employment are also low in some areas in and around the National Park. The number of jobs per resident of working age was 0.79 for the UK as a whole in 2013. The Haverfordwest Travel to Work Area⁴ (TTWA) compares well to this at 0.82 jobs per resident, but other TTWAs in the National Park area fare less well - 0.71 for Cardigan, 0.7 for Pembroke & Tenby, and 0.63 for Fishguard & St David's. The Office for National Statistics are considering whether to update the 2011 Travel To Work Areas using Census 2021.

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⁴ Travel-to-Work Areas (TTWAs) are approximations to self-contained labour markets based on commuting to work patterns.

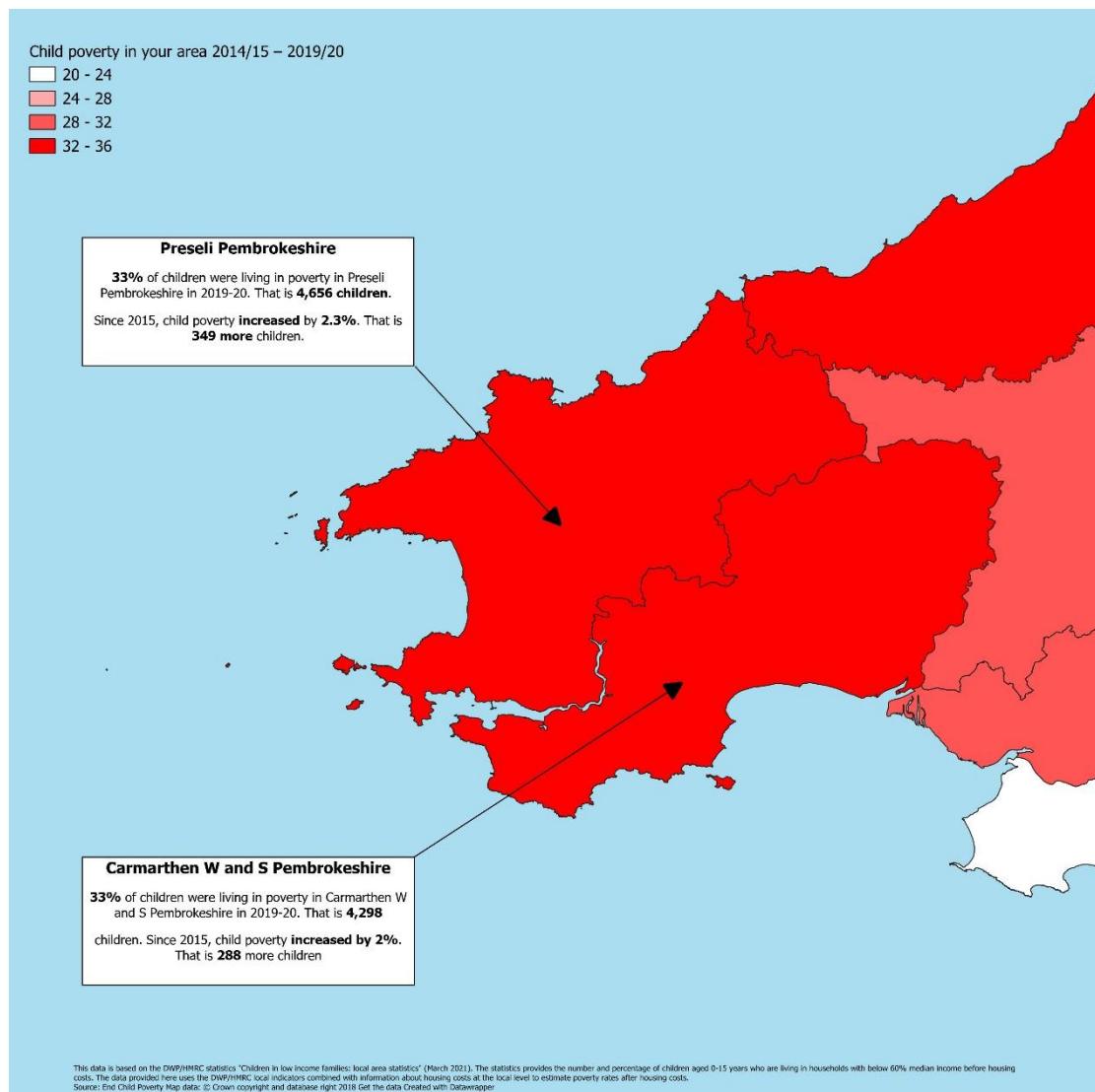
4.3 Industries of employment

4.3.1 The following table shows the percentage of people aged 16-74 in employment in each industry of employment in the National Park with figures for Pembrokeshire as a whole and Wales for comparison.

Industry	PCNP Census 2021	Pembrokeshir e 2021	Wale s 2021
A, B, D, E Agriculture, energy and water	8.6	7.4	3.7
C Manufacturing	4.7	5.9	8.7
F Construction	9.8	10.4	8.6
G Wholesale and retail trade; repair of motor vehicles and motor cycles	12.4	14.7	14.5
H Transport and storage	2.5	3.6	3.8
I Accommodation and food service activities	13.2	8.6	5.2
J Information and communication	1.7	1.6	2.7
K Financial and insurance activities	1.1	1	2.9
L Real estate activities	1.2	1	1.3
M Professional, scientific and technical activities	5	4	4.4
N Administrative and support service activities	5.6	4.5	4.2
O Public administration and defence; compulsory social security	6.4	7.8	9.2
P Education	8.1	8	9.6
Q Human health and social work activities	13.8	16.5	17
R, S, T, U Other	5.9	4.9	4.2

Data source: 2021 Census

4.4 Childhood Poverty



Child poverty in your area 2014/15 – 2019/20 - End Child Poverty

Income and employment Summary

- A third of the children in Pembrokeshire are living in poverty.
- Median gross annual earnings for full-time workers in Pembrokeshire have consistently been lower than the Welsh and UK averages.
- Unemployment benefit claimant rates rose sharply in 2020 due to the COVID-19 pandemic. Rates have since declined to around 4%, but remain above pre-pandemic levels.
- Seasonal tourism causes noticeable dips in unemployment during summer months.
- The key sectors of employment for National Park residents are accommodation & food services, human health and social work, wholesale and retail, construction and agriculture, energy and water.
- The self-employment rate in Pembrokeshire is high at 19.47% compared to 10.61% for Wales.
- The majority the businesses in Pembrokeshire “micro sized” (0-9 employees).

5 Economy

5.1 Business

5.1.1 Pembrokeshire has a high rate of self-employment, 19.47%⁵ , compared to Wales (10.61%).

5.1.2 Compared to Wales as a whole, businesses in Pembrokeshire tend to be very small, as evidenced by the relatively high proportion of businesses operating in Pembrokeshire with fewer than ten employees across their whole operation.

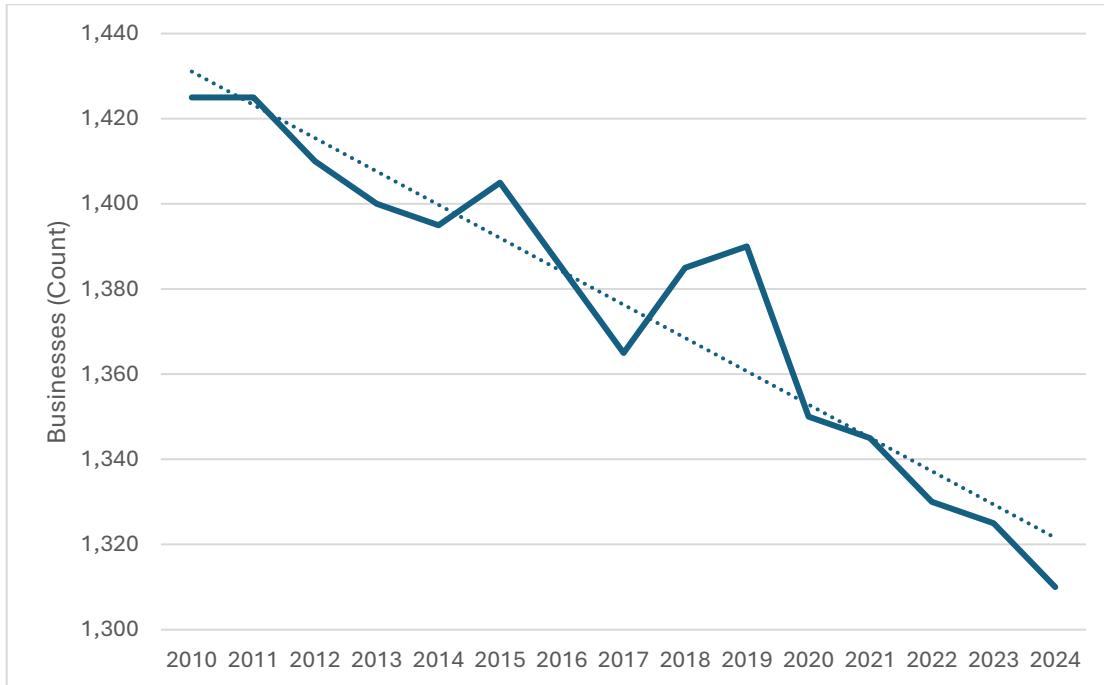
Employment sizeband	Pembrokeshire (%)	Wales (%)
Micro (0-9)	89.79%	89.32%
Small (10 to 49)	9.00%	8.88%
Medium-sized (50 to 249)	1.12%	1.48%
Large (250+)	0.09%	0.32%

UK Business Counts - local units by industry and employment size band (ONS 2024)

⁵ [Annual Population Survey: employment in the public and private sectors by sex and Welsh local authority | StatsWales](#)

5.2 Agriculture

5.2.1 There is a steady decline in the number of businesses involved in Agriculture, Forestry or Fisheries. The graph below shows the number of Agriculture, Forestry and Fisheries enterprises in Pembrokeshire between 2010 and 2024.



Data source: [Office for National Statistics \(Nomis\)](#)



5.2.2 Unlike for 2001 and 2011, data for the 1991 Census were not published for the areas of National Parks in England and Wales. The following table shows the numbers employed in agriculture in 1991, 2001 and 2011 for Pembrokeshire, and selected Wards (wholly or substantially within the National Park) with consistent boundaries in 1991 and 2001. Note that the data for 1991 is based on a 10% sample of Census returns, so the figures for wards will be subject to a wide margin of error (10 to 14%)

Percentage of workforce employed in agriculture, forestry & fishing

Area	1991	2001	2011	2021
Wales	3.45	2.49	1.7	1.8
Pembrokeshire	9.44	6.83	4.7	5.3
Newport	12.5	6.67	5.24	TBC
Dinas Cross	38.36	20.83	14.65	TBC
St Davids	18.67	9.59	6.31	TBC
The Havens	14.29	9.7	8.53	TBC
St Ishmaels	16.13	10.48	7.75	TBC
Amroth	12.2	5.05	5.06	Data to come

Source: Census 1991, 2001 & 2011

5.3 Tourism

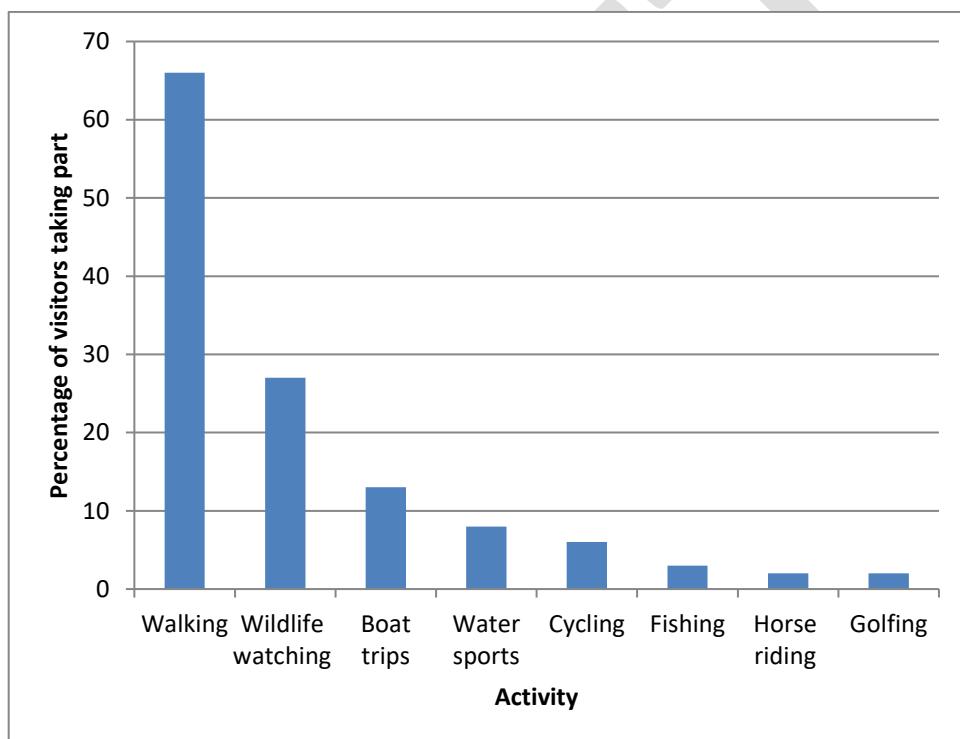
5.3.1 The STEAM Report for Pembrokeshire Coast National Park for 2021 provides an overview of the economic impact of tourism on the National Park. The headline figures from this report are presented below.

- The National Park received 2.35 million Tourism Visits during 2021
- Visitors staying overnight within the Park boundary as part of a holiday or short break accounted for 1.2 million visits and 6.5 million nights in local accommodation. Visitors staying within the Park's wider Influence Area created an additional 3.3 million nights from 567 thousand visits.
- 7.7 million Visitor Days generated by visitors to Pembrokeshire Coast National Park in 2021
- A total of £435 million was generated within the park boundary through visitor and tourism business expenditure. A further £172 million came from the Influence Area.
- Day Visits generated £43 million for the local economy in 2021.
- Visitor Numbers +66% between 2020 and 2021.
- Visitors to the Park and IA played a vital role in supporting over 9,600 full time equivalent jobs.
- In total, staying visitors within the Park boundary generated a total economic impact of £392 million.

- Staying visitors spent £129 million on accommodation in the Park staying 5.6 nights on average.
- Economic Impact +95% between 2020 and 2021.
- Total Visitor Days within the Park +102% between 2020 and 2021.
-

5.4 Recreation

5.4.1 The 2012 Pembrokeshire Tourism Survey demonstrated that walking is the most significant recreational activity undertaken by visitors to the National Park, involving about 70% of visitors. Other popular activities are shown in the following chart.



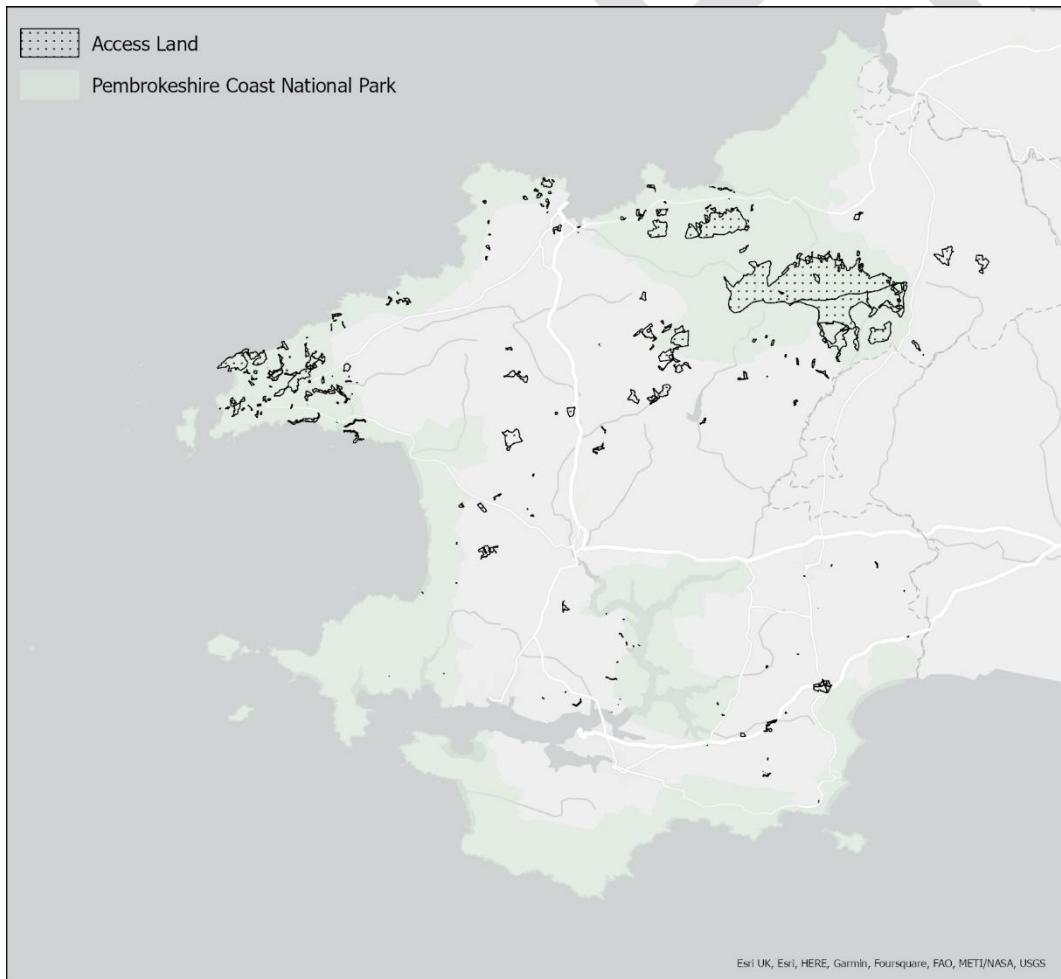
Source: Pembrokeshire Visitor Survey 2012

5.4.2 The core resource for recreational walking is the Public Rights of Way network and the Pembrokeshire Coast Path National Trail. The National Trail covers 316km around the coast of Pembrokeshire. The nature of the rest of the Rights of Way network in the National Park is summarised in the following table.

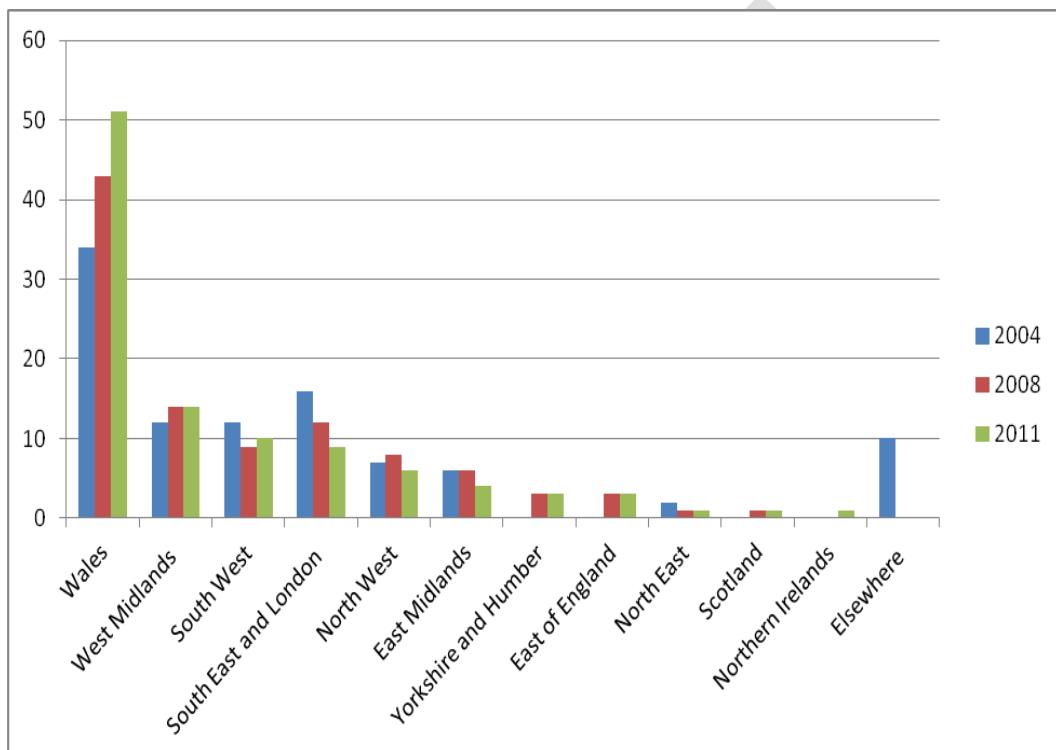
Rights of Way Network	Kilometres open	Kilometres in use	% open
Footpath	583.68	439.46	67.1%
Bridleway	177.85	165.53	93.00%
Byway open to all traffic	7.23	7.23	100.00%
Restricted Byway	1.1	1.1	100%
Total	769.86	613.32	79.67%

Source: PCNPA ROW Team (August 2017)

5.4.3 There are about 6616 hectares of Access Land in the National Park, most of it in the north. Access Land in Pembrokeshire is shown on the following map.

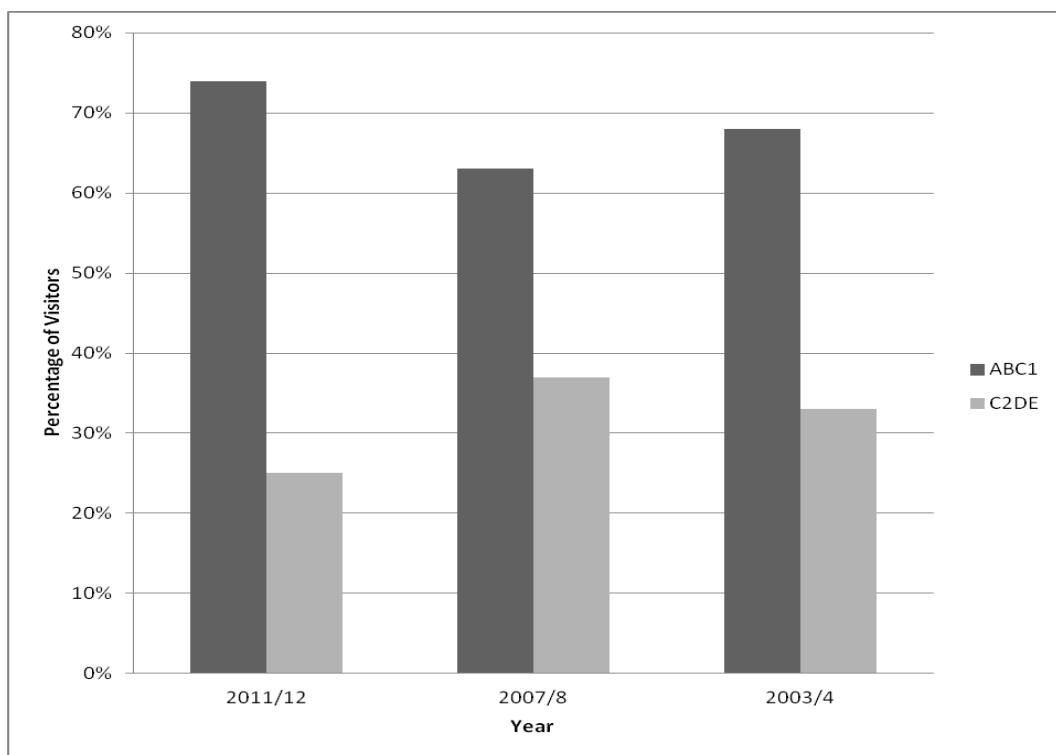


5.4.4 The origin of visitors to Pembrokeshire as determined by the Pembrokeshire Tourism Survey is shown in the following chart. The occupation group⁶ (sometimes referred to as socio-economic classification) of the visitors is shown in the subsequent chart. Between the surveys of 2004 and 2011 a marked increase in the proportion of visitors from Wales is noted, along with a slight decline in years subsequent to 2004 in visitors from London. The increase in visitor numbers from the rest of Wales may be indicative of the economic situation.



Source: Pembrokeshire Visitor Survey (2004 – 2011)

⁶ For details of these groups see ['Occupation Groups' taken from Occupation Groupings: A Job Dictionary, 6th edition, 2006.](#)



Proportion of visitors by occupation group

Source: Pembrokeshire Visitor Survey 2011

5.4.5 As for tourism there is a need for more detailed information on recreational use of the National Park, particularly on absolute numbers participating in different activities and their impact on the environment, residents and other users of the National Park.

5.4.6 In addition to the recreation function of the area relating to its designation as a National Park, there is also a requirement to provide recreation facilities for residents. An Open Space Assessment has been carried out as part of the LDP process in accordance with TAN 16 - Sport, Recreation and Open Space. Details of this assessment is included in the Local Development Plan Background Papers 'Open Space Assessment' and "Open Space Assessment Methodology'.

5.5 Education & Skills

5.5.1 The table below shows the percentage of people aged 16-74 in the National Park with a various levels of qualifications⁷, with the percentages in Pembrokeshire and Wales for comparison.

Census	No qualifications	Level 1	Level 2	Level 3	Level 4/5	Other qualifications / level unknown
PCNP (2011 Census)	21.4	12.2	16.4	10.8	30.9	4.2
PCNP (2021 Census)	17.3	7.8	13.8	16.0	36.8	8.2
Pembrokeshire (2011 Census)	24.6	13.6	16.8	11.8	24.8	8.45
Pembrokeshire (2021 Census)	18.8	9.1	15.1	17.0	31.2	8.7
Wales (2011 Census)	25.9	13.3	15.7	12.3	24.5	4.3
Wales (2021 Census)	19.9	8.7	14.4	17.2	31.5	8.3

Data source: 2021 and 2011 Census

5.6 Access to services

5.6.1 Most County Council Wards in the National Park are classified amongst the 10% most deprived in Wales in the Access to Services domain of the Welsh Index of Multiple Deprivation (WIMD) 2019. The exceptions were St David's, Newport and the area around Tenby and Saundersfoot. The Access to Services domain of the WIMD considers

⁷

Level 1: 1+ 'O' level passes, 1+ CSE/GCSE any grades, NVQ level 1, Foundation GNVQ.

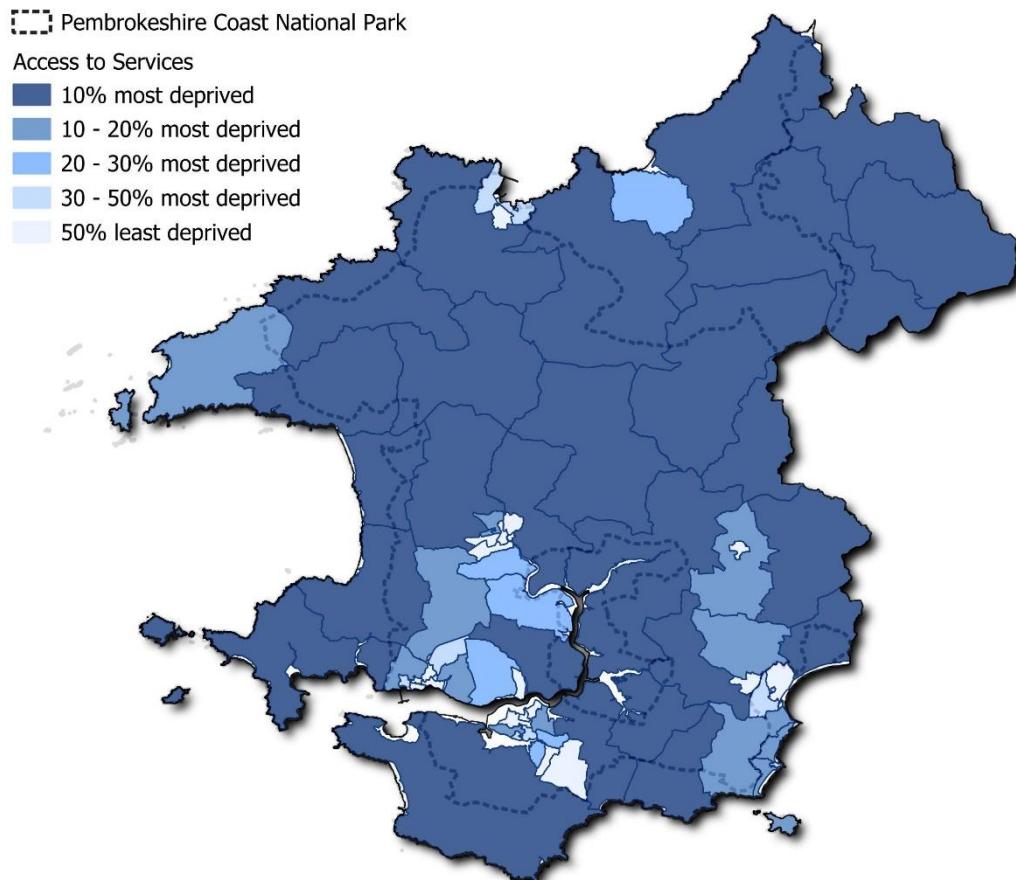
Level 2: 5+ 'O' level passes, 5+ CSEs (grade 1's), 5+ GCSEs (grades A-C), School Certificate, 1+ 'A' levels/AS' levels, NVQ level 2, Intermediate GNVQ.

Level 3: 2+ 'A' levels, 4+ 'AS' levels, Higher School Certificate, NVQ level 3, Advanced GNVQ.

Level 4/5: First degree, Higher degree, NVQ levels 4 and 5, HNC, HND, Qualified Teacher Status, Qualified Medical Doctor, Qualified Dentist, Qualified Nurse, Midwife, Heath Visitor.

access to: a food shop; GP surgery; primary school; post office; public library; leisure centre; NHS dentist; and secondary school.

The Welsh Index of Multiple Deprivation (WIMD)
2019



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5.7 Broadband

5.7.1 As of 2024, 94.02% of residents in Pembrokeshire have access to “Superfast” broadband (30mbps or greater), with over 57% of residents able to access gigabit capable speeds (1000 Mbps)⁸.

⁸ <https://www.pembrokeshire.gov.uk/better-broadband>

6 Community/ cultural distinctiveness

6.1 Welsh Language

The table below shows the proportion of Welsh speakers in the National Park and the County of Pembrokeshire at the 2001, 2011 and 2021 censuses.

Area	Welsh speakers 2001 Census (%)	Welsh speakers 2011 Census (%)	Welsh Speakers 2021 Census (%)
Pembrokeshire Coast National Park	23.3	21.5 (-1.8%)	19.4% (-2.1%)
Pembrokeshire	21.5	18.4 (-3.1%)	20.7 (+2.3%)

Source: ONS ([Office for National Statistics: Welsh skills \(speaking\), Wales: Census 2021](#))

6.1.1 The prevalence of Welsh speakers varies significantly across the county, the table and map below provide figures and show the proportion of persons who could speak Welsh at the 2021 census by Community Council Area.

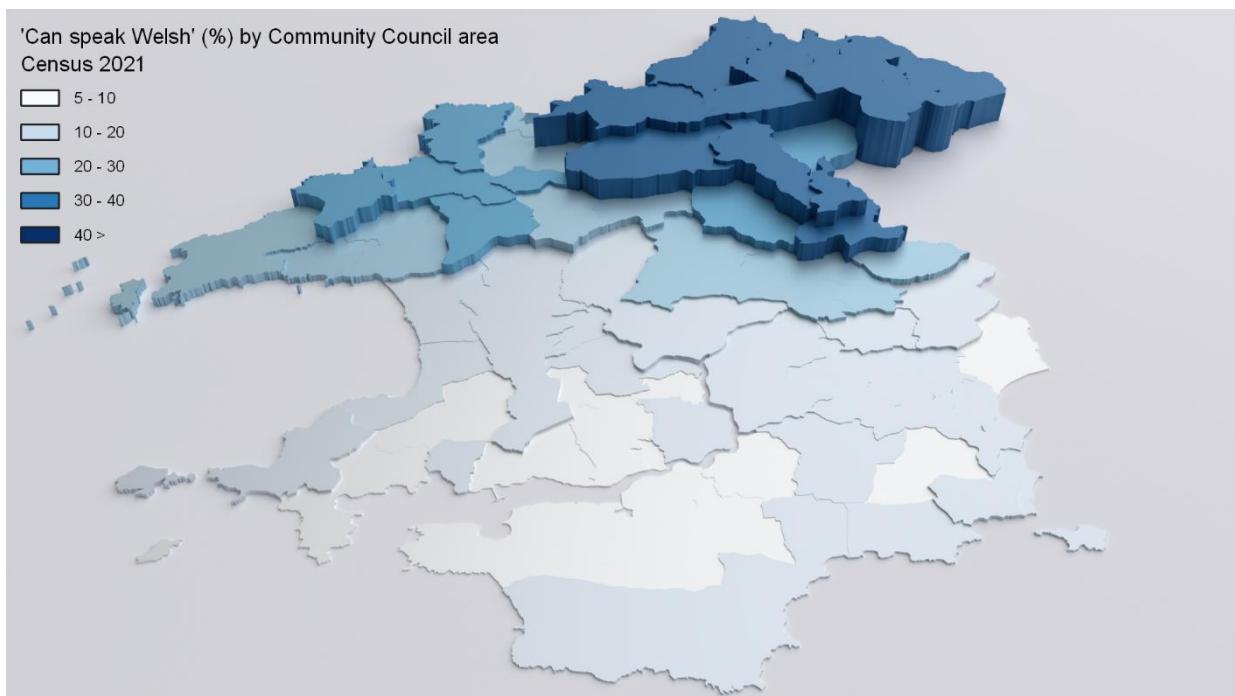
Community	Total: All usual residents aged 3 years and over	Cannot speak Welsh (Count)	Can speak Welsh (Count)	Can speak Welsh (%)
Ambleston	402	288	114	28.36
Amroth	1216	1095	121	9.95
Angle	350	320	30	8.57
Boncath	760	355	405	53.29

Community	Total: All usual resi- dents aged 3 years and over	Cannot speak Welsh (Count)	Can speak Welsh (Count)	Can speak Welsh (%)
Brawdy	900	709	191	21.22
Burton	1267	1130	137	10.81
Camrose	1747	1488	259	14.83
Carew	1475	1312	163	11.05
Cilgerran	1509	798	711	47.12
Clynderwen	896	527	369	41.18
Clydau	703	375	328	46.66
Cosheston	815	744	71	8.71
Crymych	1713	702	1011	59.02
Cwm Gwaun	305	137	168	55.08
Dale	188	170	18	9.57
Dinas Cross	754	428	326	43.24
East Williamston	1860	1641	219	11.77
Eglwyswrw	763	344	419	54.91
Fishguard & Goodwick	5326	3785	1541	28.93
Freystrop	526	462	64	12.17
Haverfordwest	11742	10284	1458	12.42
Hayscastle	447	312	135	30.2
Herbrandston	410	359	51	12.44
Hook	933	824	109	11.68
Hundleton	793	726	67	8.45

Community	Total: All usual resi- den- ts aged 3 years and over	Cannot speak Welsh (Count)	Can speak Welsh (Count)	Can speak Welsh (%)
Jeffreyston	558	488	70	12.54
Johnston	2148	1935	213	9.92
Kilgetty/Begelly	2206	1969	237	10.74
Lampeter Velfrey	1115	926	189	16.95
Lamphey	877	788	89	10.15
Letterston	1217	807	410	33.69
Llanddewi Velfrey	383	282	101	26.37
Llandissilio West	478	225	253	52.93
Llangwm	803	724	79	9.84
Llanrhian	884	533	351	39.71
Llanstadwell	785	710	75	9.55
Llawhaden	613	484	129	21.04
Maenclochog	730	360	370	50.68
Manorbier	1243	1109	134	10.78
Manordeifi	540	294	246	45.56
Marloes & St Brides	307	258	49	15.96
Martletwy	576	496	80	13.89
Mathry	491	334	157	31.98
Merlin's Bridge	2152	1896	256	11.9
Milford Haven	14329	13195	1134	7.91
Mynachlogddu	505	335	170	33.66

Community	Total: All usual resi- dents aged 3 years and over	Cannot speak Welsh (Count)	Can speak Welsh (Count)	Can speak Welsh (%)
Narberth	2952	2328	624	21.14
Nevern	854	489	365	42.74
New Moat	417	281	136	32.61
Newport	1027	609	418	40.7
Neyland	3232	3012	220	6.81
Nolton & Roch	807	700	107	13.26
Pembroke	7742	7109	633	8.18
Pembroke Dock	9344	8638	706	7.56
Penally	803	687	116	14.45
Pencaer	422	276	146	34.6
Puncheonston	521	272	249	47.79
Rosemarket	555	502	53	9.55
Rudbaxton	1135	950	185	16.3
Saundersfoot	2313	2075	238	10.29
Scleddau	1044	747	297	28.45
Solva	789	627	162	20.53
Spittal	480	404	76	15.83
St Davids	1739	1314	425	24.44
St Dogmaels	1205	705	500	41.49
St Florence	908	819	89	9.8
St Ishmaels	446	403	43	9.64

Community	Total: All usual resi- den- ts aged 3 years and over	Cannot speak Welsh (Count)	Can speak Welsh (Count)	Can speak Welsh (%)
St Mary Out Liberty	780	675	105	13.46
Stackpole & Castlemartin	548	491	57	10.4
Templeton	1038	881	157	15.13
The Havens	1102	969	133	12.07
Tiers Cross	543	461	82	15.1
Uzmaston, Boulston and Slebech	676	553	123	18.2
Walwyns Castle	301	271	30	9.97
Wiston	1096	858	238	21.72
Wolfscastle	637	450	187	29.36
Tenby	3996	3547	449	11.24



6.2 Welsh Language dialect (Pembrokeshire)

6.2.1 Parts of Pembrokeshire are known as the land of “Wês, wês” due to the dialect of Welsh spoken in these areas. One of the central characteristics of Pembrokeshire Welsh is that the syllable ‘oe’ is pronounced as ‘we’ or ‘wê’ in single syllables in the dialect. So ‘oes’ becomes ‘wês’ (yes), ‘oer’ becomes ‘wer’ (cold) ‘ddoe’ becomes ‘dwê’ (yesterday) and ‘coed’ becomes ‘cwêd’ (tree).

6.2.2 Other words found in the Pembrokeshire dialect include ‘perci’ for ‘caaeau’ (fields), ‘cered’ for ‘cerdded’ (to walk), ‘tewi’ for ‘tywydd’ (weather) and ‘wsnoth’ for ‘wythnos’ (week)^[1].

6.2.3 The distinct Welsh dialect of Pembrokeshire can be heard in the northern area of the National Park.

6.3 The South Pembrokeshire dialect

6.3.1 The South Pembrokeshire dialect is highly flavoured by the Anglo-Norman settlement of the area when the Welsh language was increasingly replaced with the English spoken by settlers from the West

^[1] Rhint y Gelaets a'r Grug, Tafodiaith Sir Benfro, Wyn Owens, Y Lolfa, 2013

Country. Many Flemish traders were encourage to settle here in the early twelfth century, with Flemish still being spoken some four centuries later.

6.3.2 The historically intermediate zone between the 'Englishry' and 'Welshry' (later labelled the 'Landsker') is still apparent linguistically. However the 'Landsker' is likely to continue to become less distinct over time as Welsh-speaking develops across Pembrokeshire, supported by Welsh language education opportunities.

6.3.3 Many words commonly used in the area stem from the settlers from the west of England - words such as culm (small coal), drang (alleyway), lake (confusingly, river) and evil (hay-fork). A few words have Flemish origins such as 'slop' (gap in a hedge) and hadridge (wild charlock).

6.3.4 Many placenames exist from this period, for example the suffix 'ton' is typical of English settlement. The survival also of many Welsh placenames across the area, such as Pwllcrochan and Rhoscrowther, suggests that pockets of the Welsh language also continued to thrive. Some older placenames did inevitably change - Merthyr Tywai becoming Martletwy for example.

6.3.5 There are many wonderful dialect words still in use today. 'Why aye' and 'Why no' are still common, 'in a caffle' or 'all to clush' (muddled), 'kift (awkward), 'pile' (to throw), 'grip' (ditch) and 'stumming' (hot) or stivvling (cold). Some lovely words and phrases describe personal characteristics such as 'tamping' (angry) 'plenty of kidney' (boastful) a 'hernie' (sly person), 'talking rammas' (telling tall tales) and 'slammocky' (untidy person).

6.3.6 Local people still use their own pronunciation for placenames. These include 'Langum' (Llangwm), 'The Ross' (The Rhos), 'La-hadden' (Llawhaden), 'Landewy' (Llanddewi Velfey) and Sandersfoot (Saundersfoot). Some placenames are clipped such as 'Harfat' (Haverfordwest), 'Tish' (St Ishmaels) and 'Satson' (Sageston).

6.3.7 Finally, there is the almost forgotten Tenby 'backslang' invented to confound the Brixham trawermen in the nineteenth century. The rule is to move the first letter of a word to its end and then add an 'a'. Thus, Tenby becomes 'Enbyta'.

6.4 Other indicators of cultural distinctiveness

6.4.1 Culture is an aspect of the LandMap landscape characterisation programme for Wales. This aspect will soon be complete and may provide indicators of cultural distinctiveness in the National Park. Cultural distinctiveness, whilst considered a special quality of the National Park, is likely to prove difficult to measure.

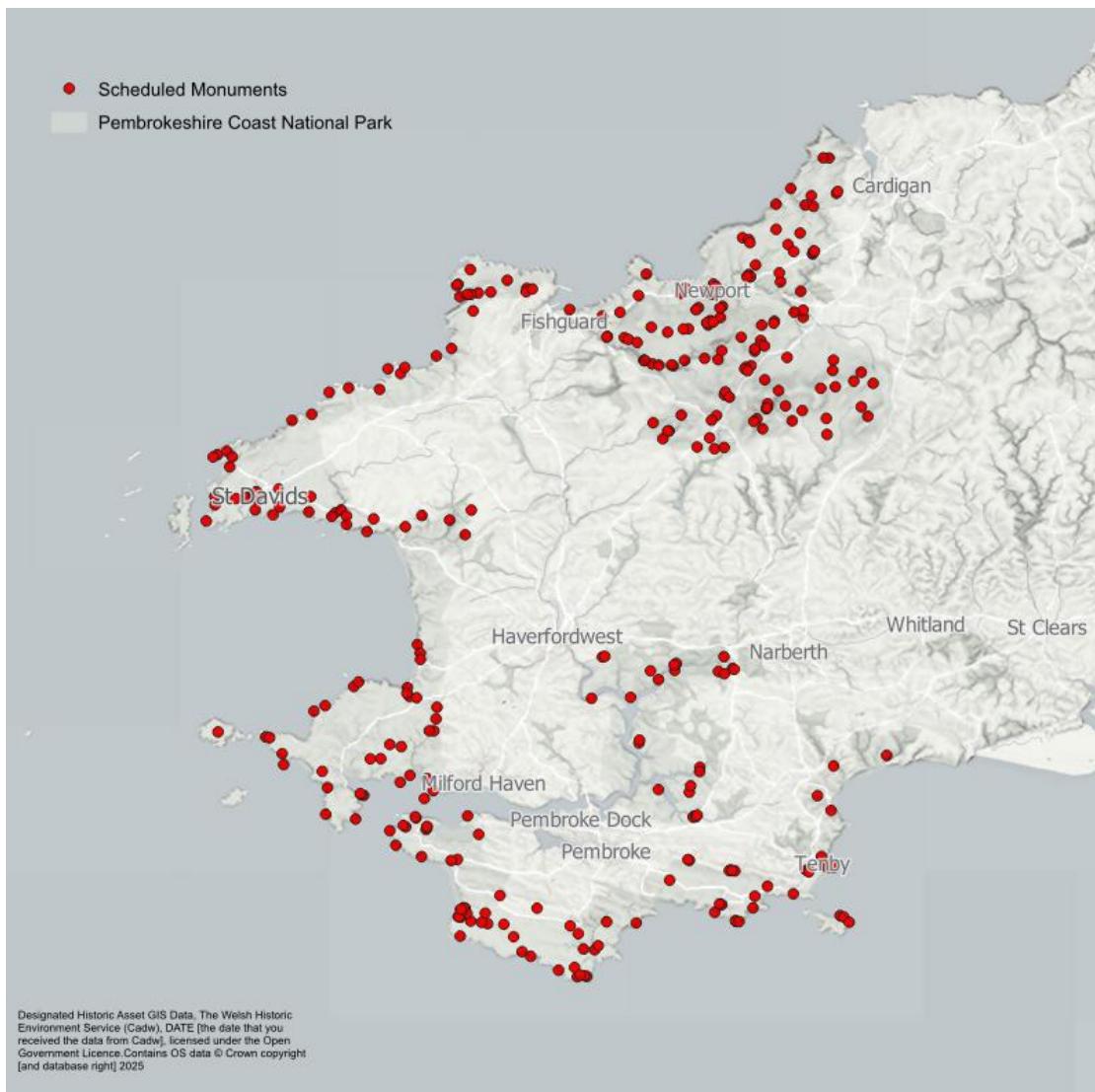
Community / Cultural Distinctiveness Summary

- **Welsh speakers in the National Park have declined between censuses, by contrast Pembrokeshire as a whole has seen a slight increase in Welsh speakers between censuses.**
- **The prevalence of the Welsh language varies significantly between communities .**
- **North Pembrokeshire has a distinct Welsh dialect, whilst South Pembrokeshire has strong Anglo-Norman and Flemish influences to its dialect.**

DRAFT

7 Historic environment

7.1.1 There are over 280 Scheduled Monuments (SAMs) in the National Park, and over 10000 sites in the Historic Environment Records (HER – Dyfed Archaeological Trust). The locations of SAMs are shown in the following map.



7.1.2 Some data on the condition of Scheduled Monuments in the National Park is available and has been provided by CADW (September 2021). However, the data is not comprehensive and no trend data is currently available.

Summary of Scheduled Monument condition in Pembrokeshire Coast National Park:

Current Condition	Count
Favourable	196
not assessed	5
Unfavourable	68

Source: CADW (2021)

7.1.3 There are 14 Conservation Areas within the National Park, with the addition of Newport Parrog in 1999. Tenby Conservation area was extended in 2019. The National Park Authority also produced and adopted a “Conservation Area Proposals” Supplementary Planning Guidance (SPG) in October 2022.

7.1.4 Article 4 directions are applied to Little Haven, Newport, Solva, St Davids and Tenby conservation areas, which restrict permitted development and will help to further protect these areas from the impacts.

7.1.5 Details of the Park’s Conservation areas including size and location can be found in the table and map below.

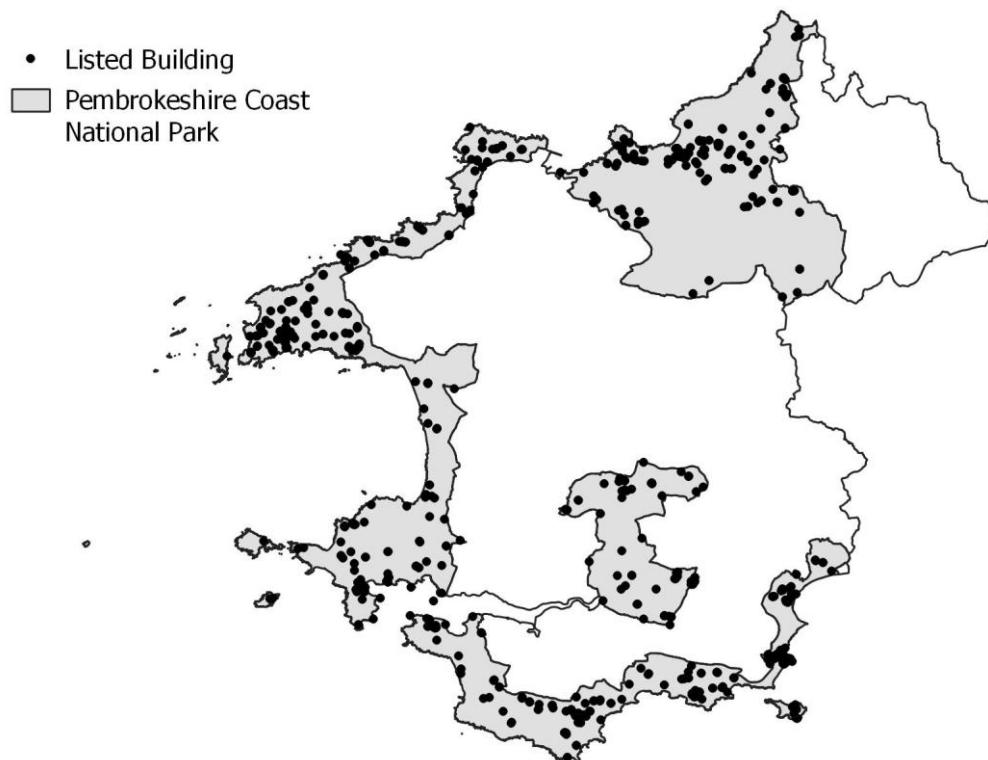
Settlement	Area (hectares)
Angle	166.815
Caerfarchell	9.836
Caldey Island	97.028
Cresswell Quay	30.496
Little Haven	5.435
Manorbier	41.266
Newport &Parrog	33.43
Portclew	2.85
Porthgain	112.32
Saundersfoot	20.73

Settlement	Area (hectares)
Solva	62.366
St Davids	32.75
Tenby	120.614
Trefin	9.797



7.1.6 There are over 1200 listed buildings in the National Park, 33 of these are Grade I, and 76 Grade II*. The locations of these buildings are shown on the following map. Newport, St David's and Tenby are shown at greater detail (note these maps are intended to indicate the distribution of listed buildings in the National Park, they do not show the definitive locations of the buildings).

7.2 Listed buildings in the Pembrokeshire Coast National Park



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Listed buildings in Newport

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Listed buildings in St David's

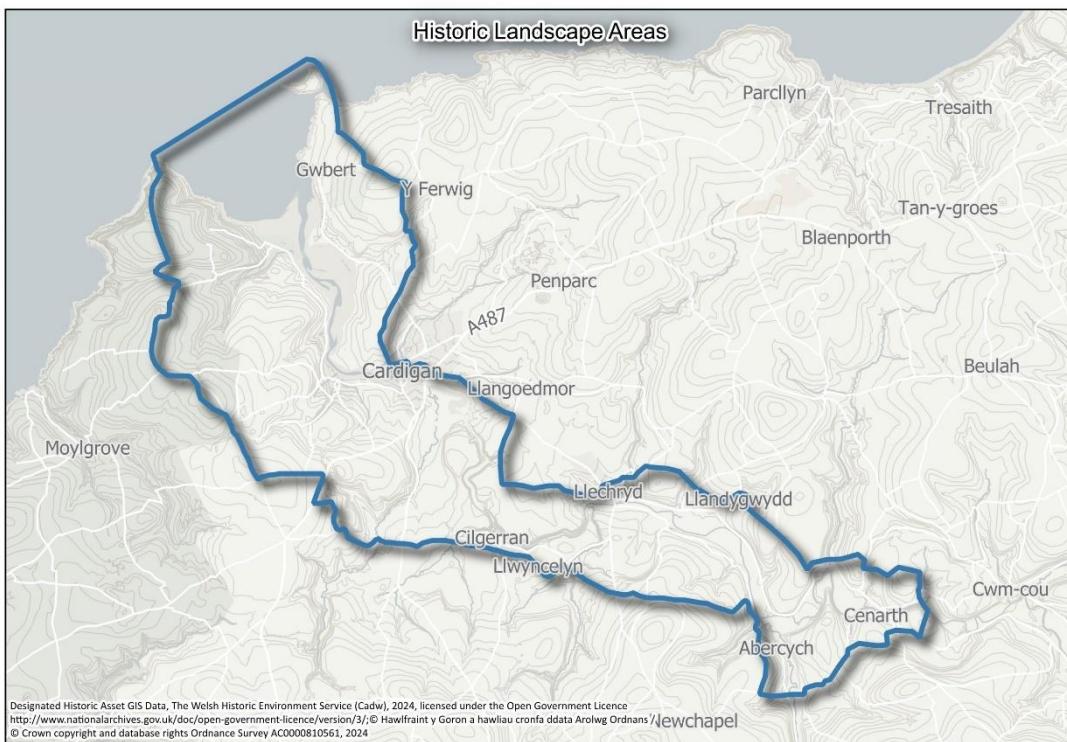
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Listed buildings in Tenby

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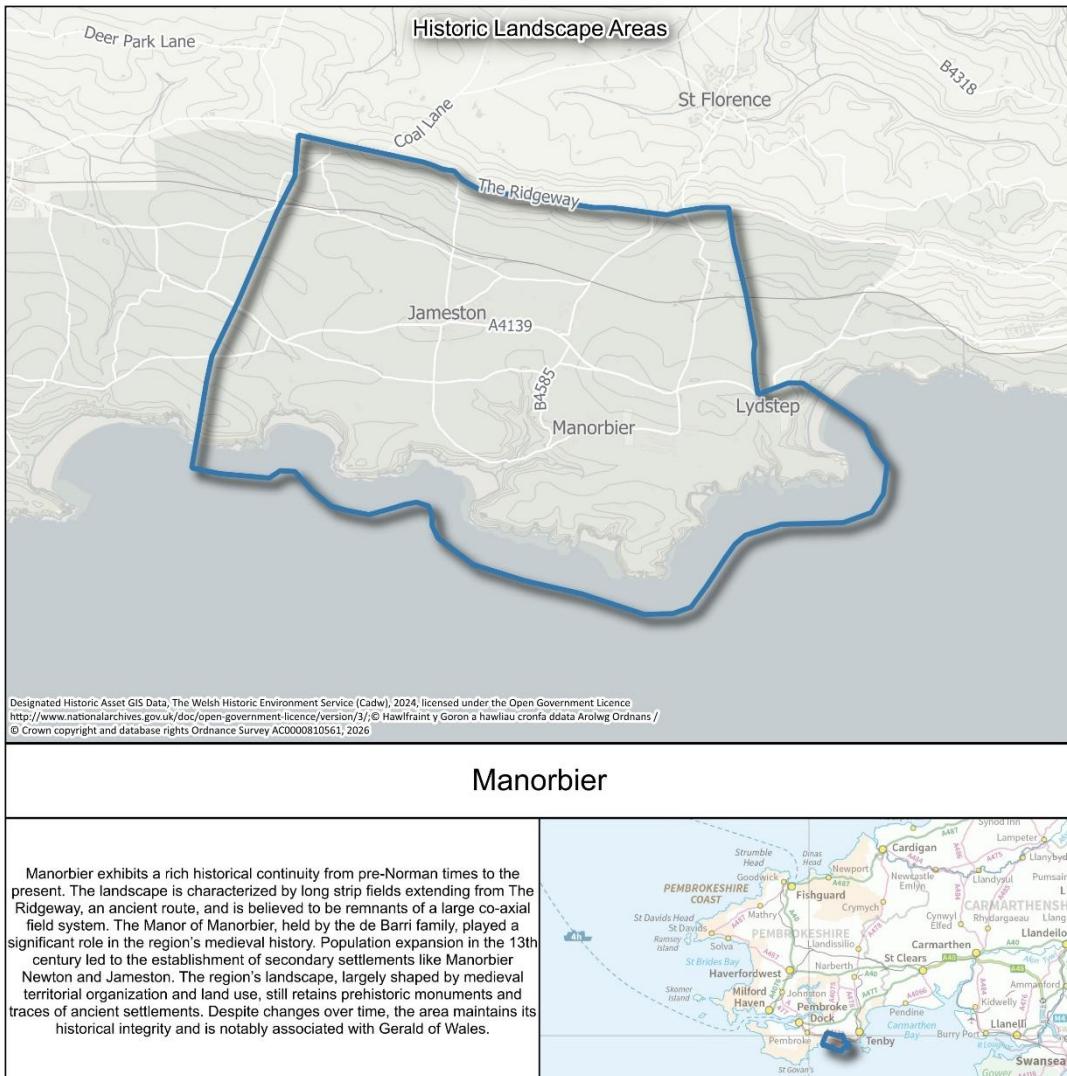
There are 9 Historic Landscape areas all or partly within the National Park. These are: Mynydd Preseli; St David's Peninsula & Ramsey Island; Skomer Island; Milford Haven Waterway; Newport & Carningli; Pen Caer; Stackpole Warren; the Lower Teifi Valley; and Manorbier. They are shown on the following maps:

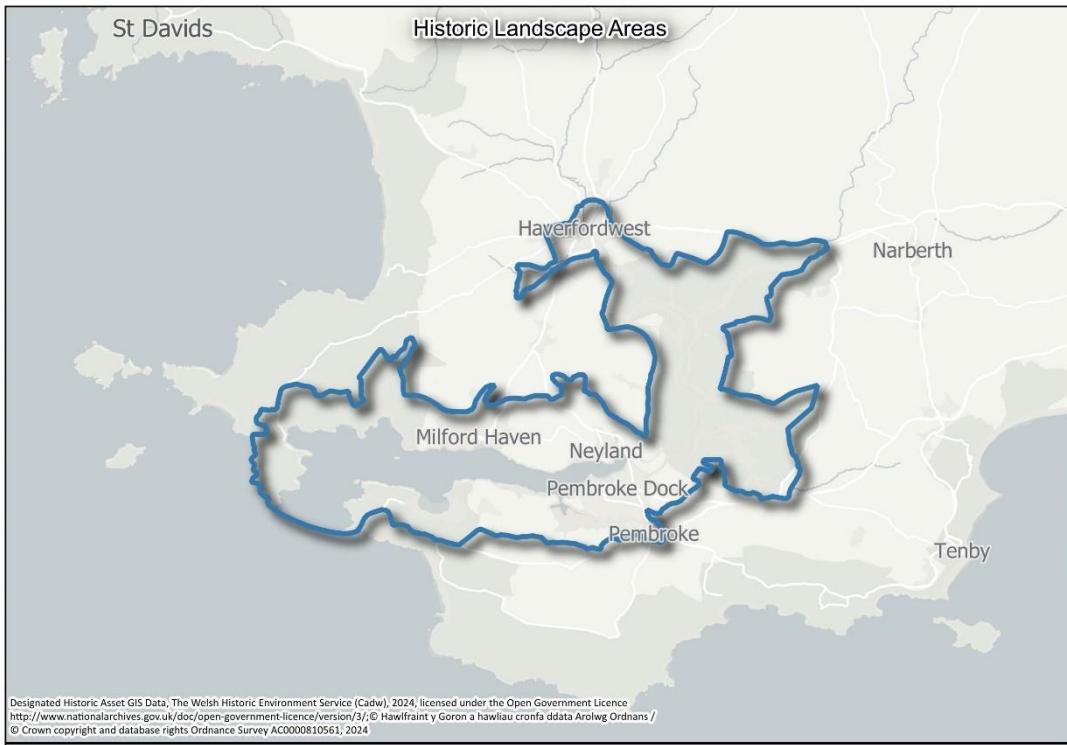


Lower Teifi Valley

The River Teifi, one of Wales's most famous rivers, flows from the Cambrian Mountains to Cardigan Bay, creating a picturesque valley. The area has been a focus for Quaternary geologists, with recent studies suggesting that sub-glacial stream channels formed the lower Teifi gorges. The river's course was shaped by glacial drift deposits, and the estuary mouth features raised beach deposits and extensive sand dunes. The area has seen significant historical development, from Bronze Age monuments to medieval settlements like St Dogmaels and Cardigan. The river played a crucial role in the area's commercial prosperity from the 17th century onwards, supporting industries like fishing, shipbuilding, and quarrying. Today, while some quarrying remains, the river and estuary are primarily used for leisure and tourism, with an increasing appreciation for their ecological value.





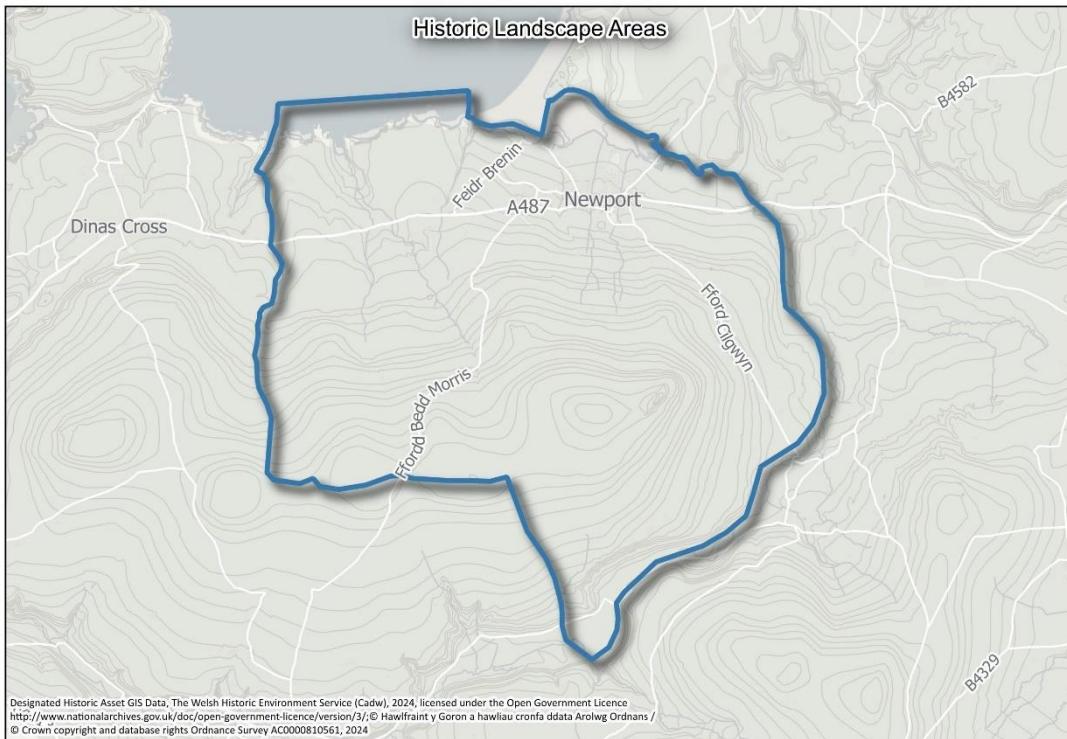


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<http://www.nationalarchives.gov.uk/doc/open-government-licence/version/3/>; © Hawlfraint y Goron a hawliau crwner ddata Arolwg Ordnaeth /
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Milford Haven Waterway

The Haven, a ria formed after the last Ice Age, extends 30km inland, dividing into the Eastern and Western Cleddau. Its landscape encapsulates maritime history from the 11th to the late 20th century, with Iron Age forts, early medieval sites, and Norman castles like Pembroke, Haverfordwest, and Carew. The construction of the Cleddau bridge ended a network of cross-Haven ferries, leading to the establishment of towns like Milford and Pembroke Dock. Changes in ship sizes and technology led to a shift in coastal trade, preserving quays, jetties, and small settlements. Medieval castles transformed into gentrified residences, while ecclesiastical establishments became ruins or residences. The Palmerstonian Forts represent the most complete military and naval fortifications. The late 20th century saw the rise of the oil and power industries, leaving a legacy of jetties, oil terminals, and shore processing facilities.

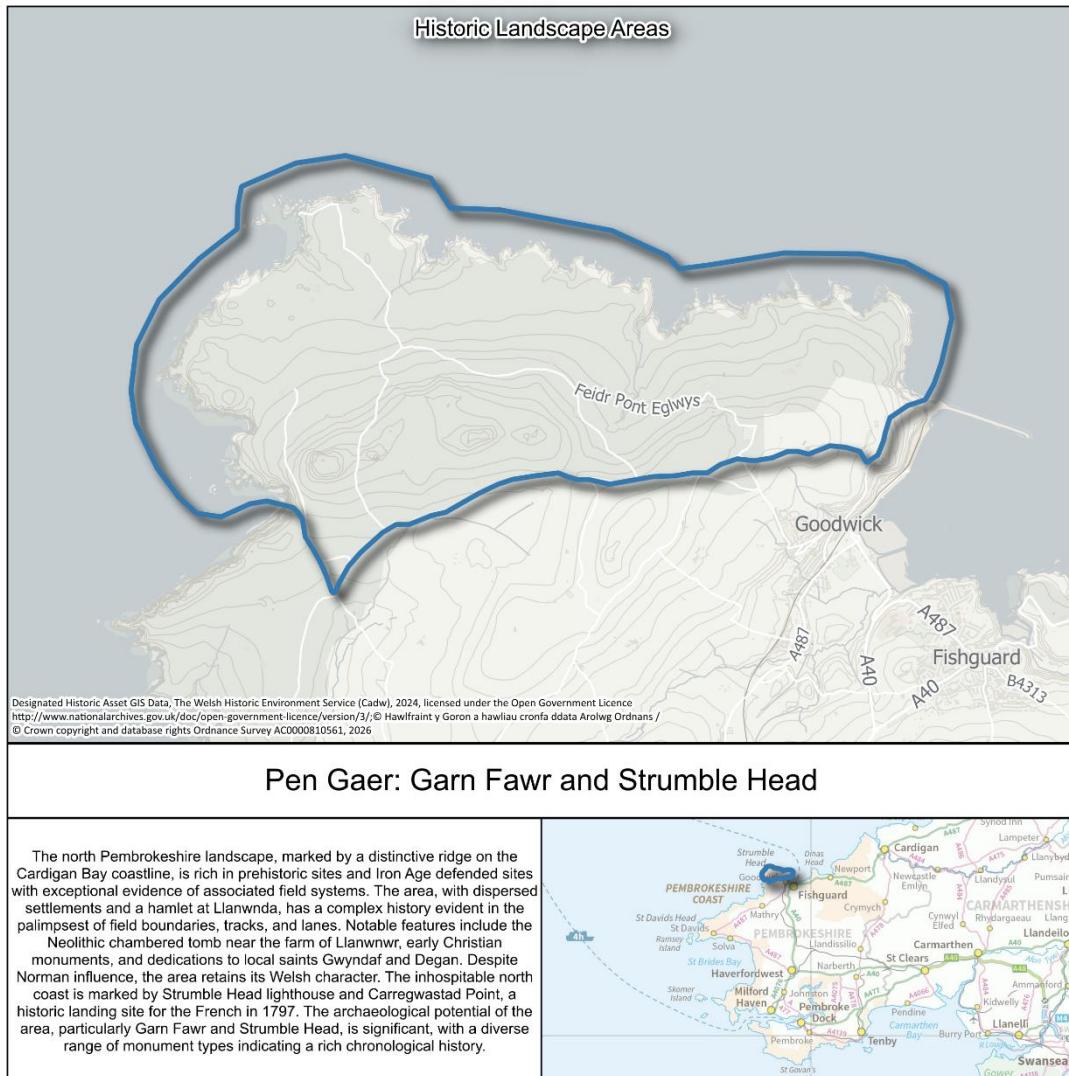


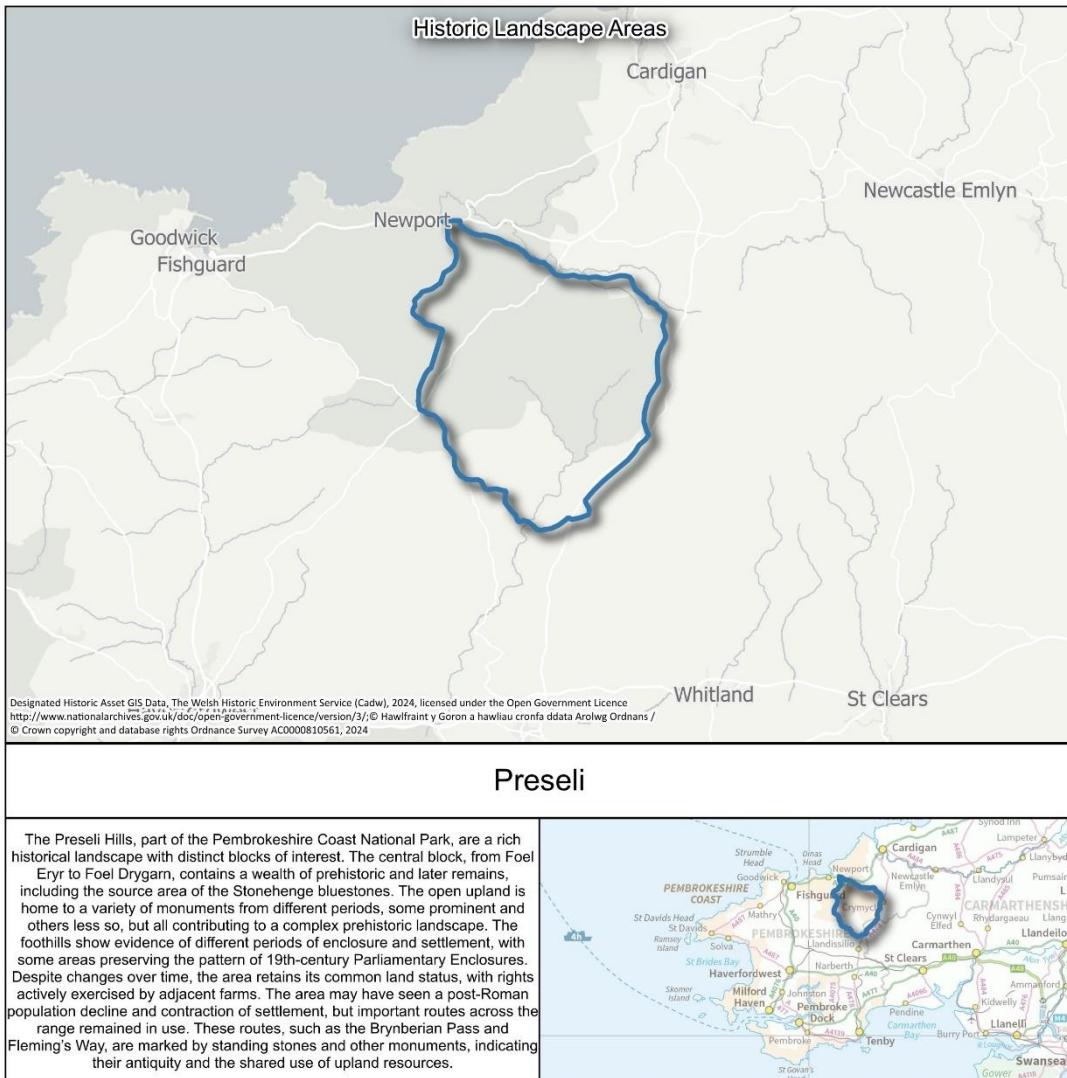


Newport and Carningli

Newport, a small medieval borough in north Pembrokeshire, is known for its well-preserved medieval topography, with elements of a medieval Marcher lordship still visible. The Anglo-Norman landscape, created by the Fitzmartin lords of Cemais, overlays an earlier Welsh landscape of dispersed settlement. The area is rich in archaeological remains, including Neolithic burial chambers and prehistoric enclosures on the slopes of Carningli. The town and castle, founded around 1197 by William Fitzmartin, have a well-documented history, with evidence of late 12th- to early 13th-century burghal houses and medieval pottery production. Despite modern developments, open plots of ground remain at the end of the town's two axial streets. The town was a trading post in the 16th century, with slate quarries and a herring fishery bringing prosperity. Today, the area is used for local fishing and leisure boating.







Historic Landscape Areas

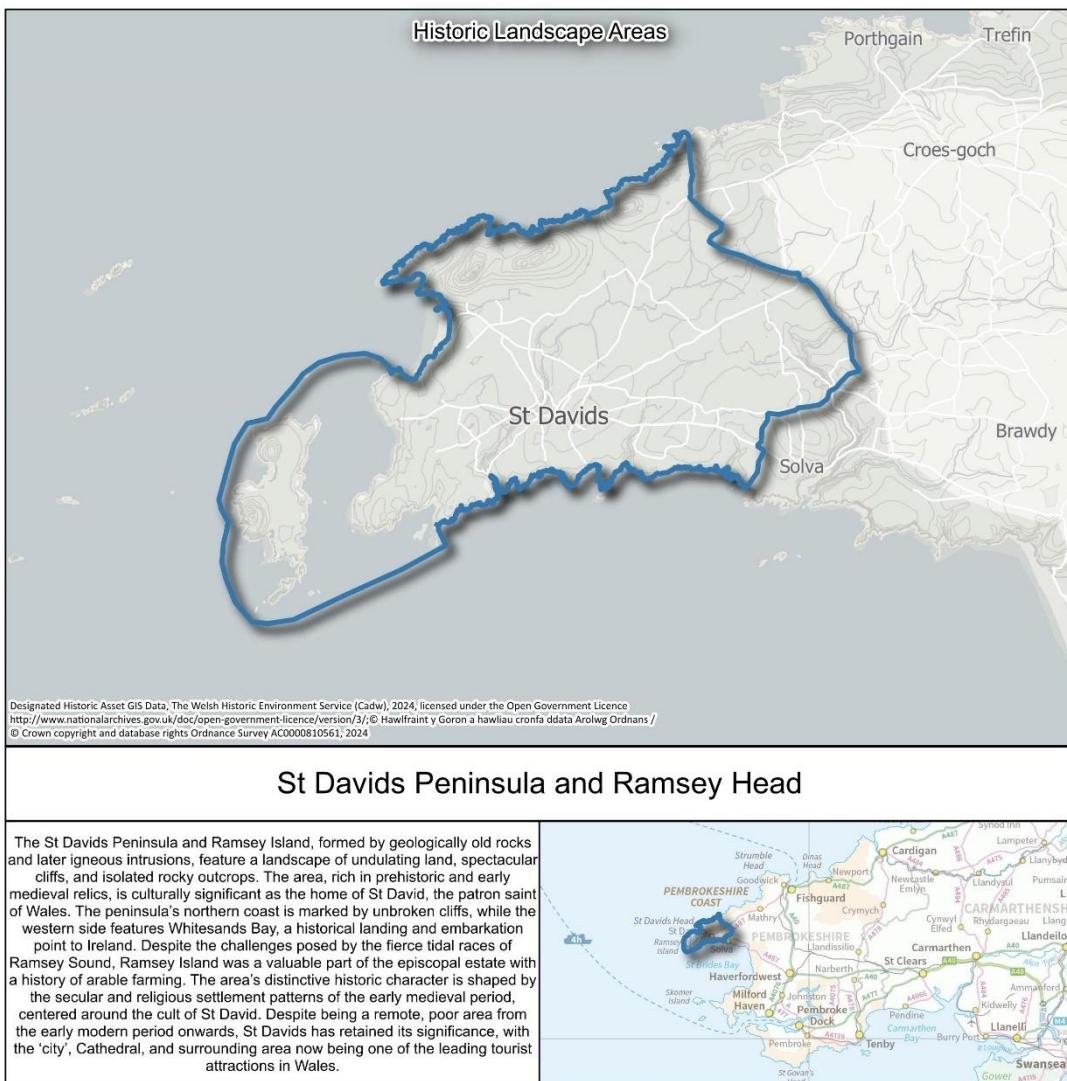


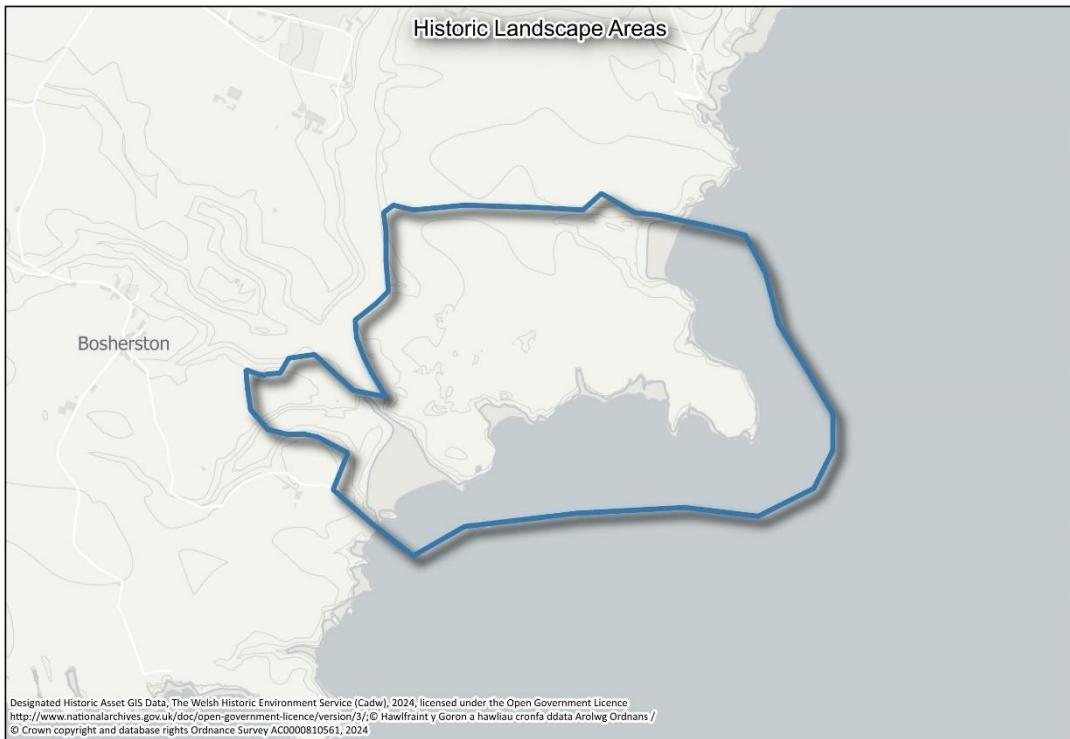
Designated Historic Asset GIS Data: The Welsh Historic Environment Service (Cadw), 2024, licensed under the Open Government Licence
<http://www.nationalarchives.gov.uk/doc/open-government-licence/version/3/>; © Hawlfraint y Goron a hawliau crwneriau ddata Arolwg Ordnaeth /
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Skomer Island

Skomer Island, separated from the mainland by a 600m rock-strewn Jack Sound, is renowned for its National Nature Reserve and Marine Nature Reserve, but its archaeological significance is equally noteworthy. The island is home to extensive remains of prehistoric fields and small settlements, with the majority of the island covered in prehistoric field boundaries, except for the center where 18th and 19th-century farming has imposed new walled fields. The island's archaeology suggests a stable population and economy, with evidence of cereal production, grazing, and use of sea and shore resources. In the Middle Ages, the island was used for rabbit farming introduced by the Normans. The island's prehistoric field systems have been the subject of recurrent attention and survey since the last War, with aerial photography adding more detail, and there is still potential for future work.







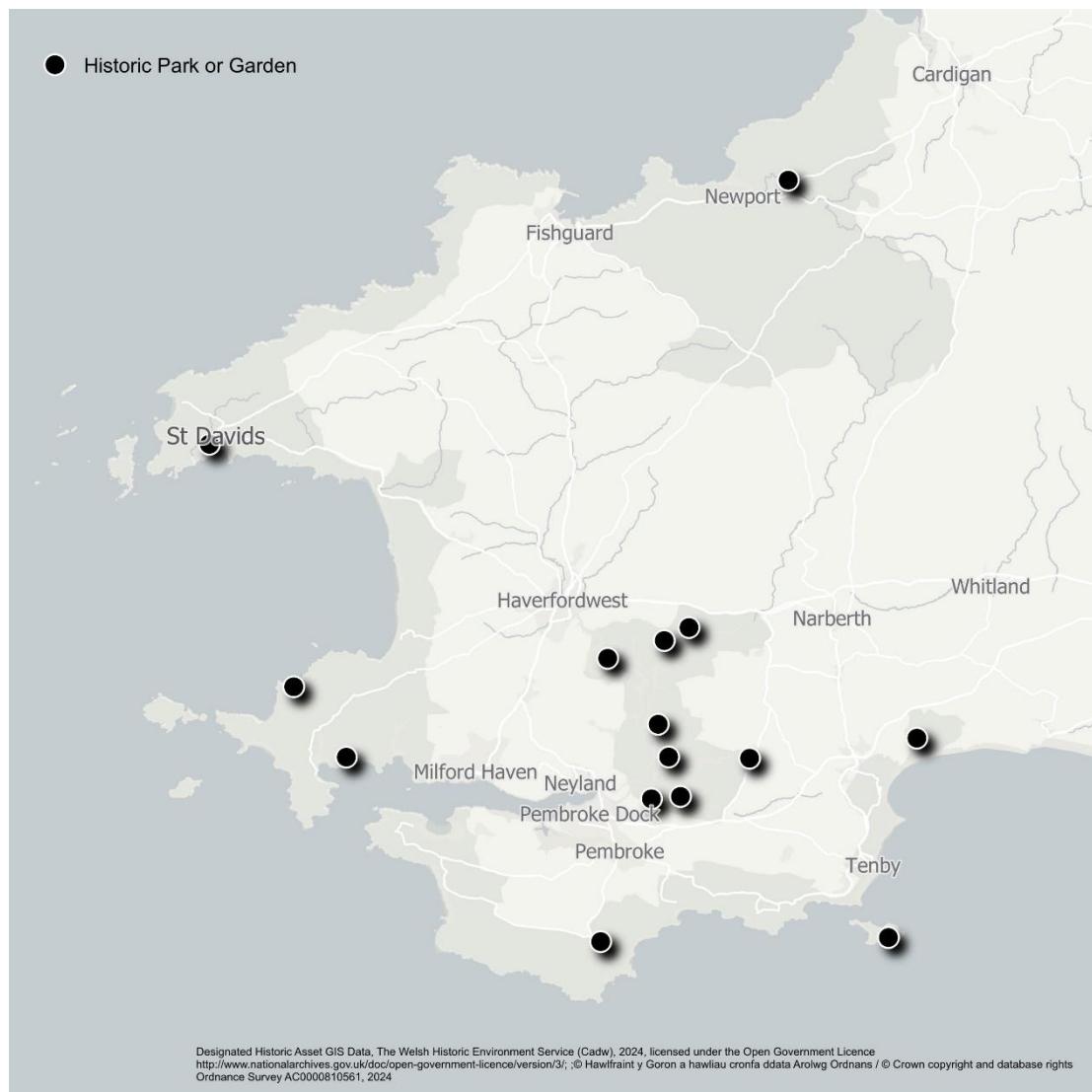
Designated Historic Asset GIS Data: The Welsh Historic Environment Service (Cadw), 2024, licensed under the Open Government Licence
<http://www.nationalarchives.gov.uk/doc/open-government-licence/version/3/>; © Hawlfraint y Goron a hawliau crwner ddata Arolwg Ordnaeth
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Stackpole Warren

Stackpole Warren is a distinctive landform unit with a rich archaeological history. The area is covered in calcareous blown sand, which has preserved prehistoric sites and landscapes, making it an area of exceptional archaeological significance. Excavations have revealed artifacts from the Mesolithic to the Bronze Age, including a well-preserved roundhouse at the Devil's Quoit site. The area was part of the Stackpole Estate in the medieval period, and the sand dunes led to its use as a rabbit warren. Despite changes and clearances over time, Stackpole Warren remains an area of exceptional archaeological potential, with the northern area containing the largest extent of buried prehistoric stratified archaeological deposits known from any location in South West Wales.



7.2.1 There are 15 historic Parks and Gardens in the National Park: Boulston Old Hall; Colby Lodge; Cosheston Hall; Cresselly; Lawrenny; St Brynach's Churchyard; St Brides Castle; Upton Castle; Warpool Court Hotel; Caldey Priory; Trewarren; Picton Castle; Slebech Park; Coedcanlas; and Stackpole Court. These are shown on the map below:



7.2.2 Though it is clear from the above information that there is a rich historic environment in the Pembrokeshire Coast National Park, more information is needed on the condition and management of sites. There is also likely to be a significant offshore historic resource (wrecks and submerged prehistoric sites) and more information on this is desirable.

Historic Environment

- **There are over 280 Scheduled Ancient Monuments, and more than 10,000 sites in the Historic Environment in The National Park.**
- **The National Park has 14 Conservation areas the most recent of which is Cresswell Quay, which was designated in October 2024.**
- **There are 1,200 listed buildings in the National Park including 33 that are grade I and 76 that are grade II*.**
- **9 Historic Landscape areas are partly or entirely within the National Park.**
- **The National Park has 15 Historic Parks and Gardens.**

DRAFT

8 Transport

8.1 Car ownership

8.1.1 The National Park has high levels of private car ownership. At the 2021 Census 86.2% of households owned at least one car or van with just 13.7% owning no cars or vans at all. Compared to Wales as a whole, where 19.4% of households have no cars or vans.

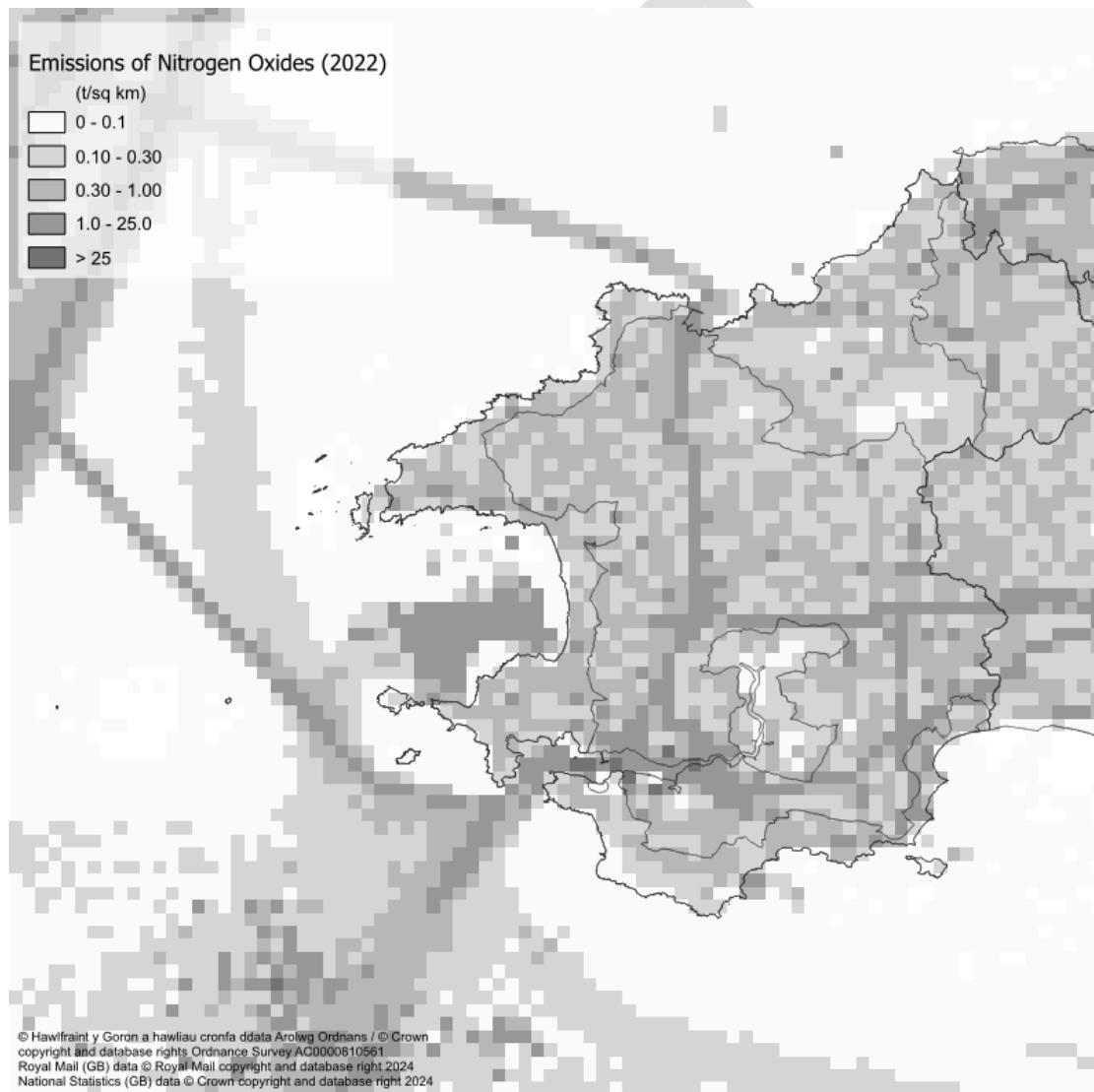
Bus use

Service	2018 /2019	2019 /2020	2020 /2021	2021 /2022	2022 /2023	2023 /2024	2024 /2025
Haverfordwest - Dale (315)	11632	8770	501	2945	3125	-	-
Coastal Cruiser: Angle Peninsula (387/88)	6295	6417	931	4745	5890	-	7696
Puffin Shuttle: St Davids - Marloes (400)	14948	12338	1255	7455	5119	-	8899
Celtic Cruiser (403)	31788	31975	3994	24012	30350	-	25052
Strumble Shuttle: St Davids - Fishguard(404)	12359	9480	733	4307	4135	-	5884
Poppit Rocket: Cardigan - Newport - Fishguard(405)	9136	7127	1135	3288	2270	-	-
Total	86158	76107	8549	46752	50889	-	47531

9 Pollution

9.1 Air pollution/quality

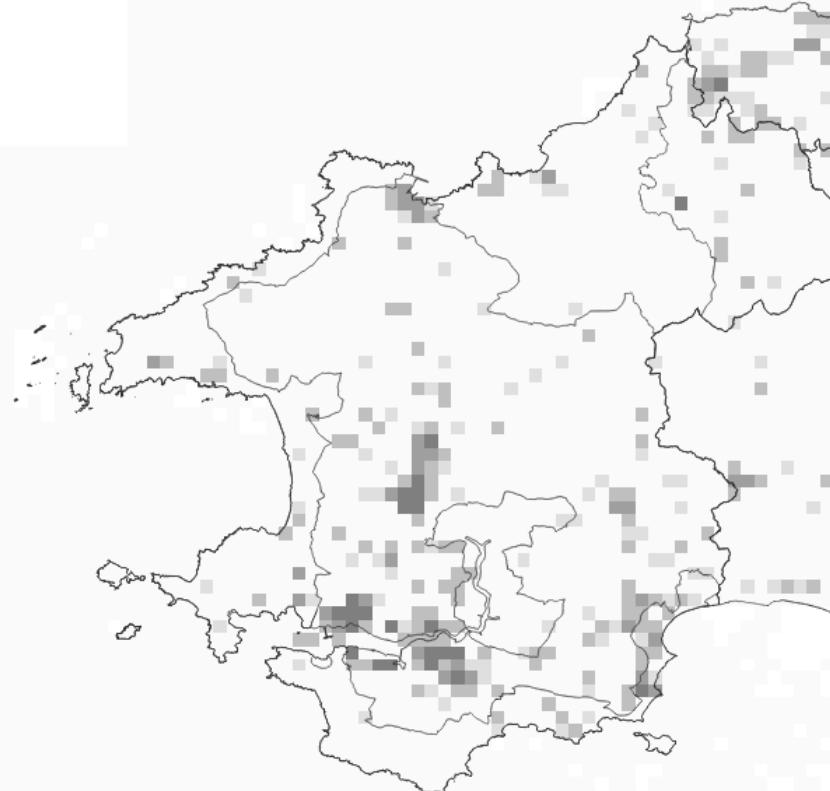
9.1.1 A range of air pollution emissions data and maps, with emissions broken down by sector are available from the web site of the National Atmospheric Emissions Inventory ([National Atmospheric Emissions Inventory](#)). Emissions maps for Pembrokeshire in 2022 are presented below for Oxides of Nitrogen (NOx) and Carbon Monoxide, and the 2022 emissions map for particulate matter smaller than 10µm.



Emissions of Carbon Monoxide (2022)

(t/sq km)

- 0 - 2
- 2 - 3
- 3 - 10
- 10 - 20
- > 20



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Emissions of Particulate Matter <10um (2022)

(t/sq km)

- 0 - 0.1
- 0.1 - 0.2
- 0.20 - 1.0
- 1.0 - 4.0
- > 4.0

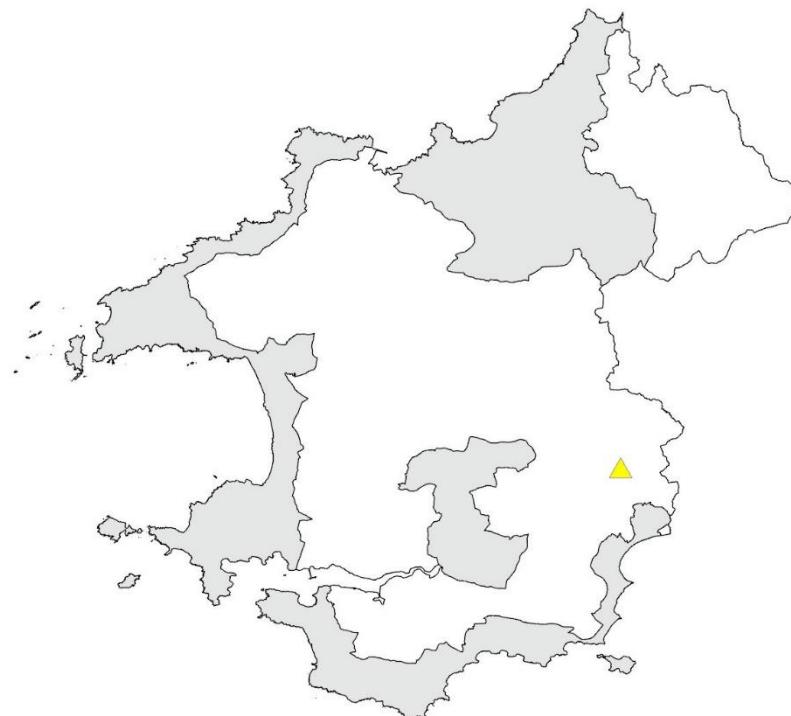


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National Statistics (GB) data © Crown copyright and database right 2024



9.1.2 There is one automatic air quality monitoring station operating in Pembrokeshire:

Near Narberth on a rural site near the B4314 (grid ref SN146127), operated on behalf of DEFRA since 1997.



Narberth Automatic Air Quality Monitoring Station: Annual Averages

Emissions	2018	2019	2020	2021	2022	2023	2024
NOx as NO ₂ (max daily mean μm^{-3})	21	19	17	17	16	18	13
Particulates <10 μm (max daily mean μm^{-3})	28	44	62	41	60	39	*

Source: [Maps & Data | Air Quality In Wales](#)

9.1.3 It has not been possible to source data to estimate air quality across the National Park as this would require samples from a relatively large number of locations in and around the Park. Whether it is desirable to acquire this data is debatable, collecting it may involve significant effort, and air quality issues for the National Park relate more to the role of activities in and around the Park in contributing air pollutants (covered by

the NAEI data) rather than the air quality experienced at sites in the National Park.

9.2 Water quality

9.2.1 The classification (under the Water Framework Directive (2000) classification system) of water bodies in the National Park is generally “Moderate” according to the most recent data from Natural Resources Wales.

River Water Bodies:

There are 23 river water bodies identified in the National Park:

Water body ID	Water body name	Type	Overall status (WFD)
GB110061038330	Alun - headwaters to tidal limit, Porth Clais	River	Moderate
GB110061031160	Brandy Brook - headwaters to tidal limit	River	Moderate
GB110061038450	Brynberian - headwaters to confluence with Nyfer	River	Good
GB110061025000	Castlemartin Corse - headwaters to tidal limit	River	Moderate
GB110061038560	Clydach - headwaters to confluence with Nyfer	River	Moderate
GB110061030981	Cresswell River, headwaters to tidal limit	River	Moderate
GB110061038290	E. Cleddau - conf with Wern to conf with Syfynwy**	River	Good

GB11006103067 0	Eastern Cleddau - conf with Syfynwy to tidal limit*	River	Moderate
GB11006103832 0	Eastern Cleddau - headwaters to conf with Wern	River	Good
GB11006103077 0	Ford's Lake - HW to tidal limit, Wiseman's Bridge	River	Moderate
GB11006103846 0	Gwaun - headwaters to tidal limit	River	Moderate
GB11006103861 0	Nant Duad - headwaters to confluence with Nyfer	River	Moderate
GB11006103066 0	Narbeth Brook - headwaters to conf with E. Cleddau	River	Moderate
GB11006103078 0	New Inn Stream - headwaters to tidal limit	River	Moderate
GB11006103863 0	Nyfer - Confluence with Nant Duad to tidal limit	River	Poor
GB11006103851 0	Nyfer - headwaters to confluence with Brynderian	River	Good
GB11006102515 0	Ritec - headwaters to tidal limit	River	Moderate
GB11006103100 0	Sandy Haven Pill	River	Moderate
GB11006103834 0	Solva - headwaters to tidal limit	River	Good
GB11006103830 0	Syfynwy - headwaters to Llys- y-fran	River	Good
GB11006103850 0	Unnamed - HW to tidal limit,	River	Good

	Aberbach, nr Abermawr		
GB110061038310	Wern - headwaters to conf with Eastern Cleddau	River	Poor
GB110061030930	Winterton Marsh - HW to TL, Nr Pickleridge Lagoon	River	Moderate

Datasource:NRW [Water Framework Directive \(WFD\) Regulations Cycle 3 Classification | DataMapWales](#)* Very small length within the National Park

** Runs adjacent to the National Park boundary, overlaps in small sections

In summary the overall WFD statuses of river water bodies in the National Park is:

2 – Poor

14 – Moderate

7 -Good

Transitional Water Bodies:

Water body ID	Water body name	Type	Overall status (WFD)
GB521006110500	Gwaun Estuary	Transitional	Moderate
GB521006109400	Solfach Estuary	Transitional	Moderate
GB531006114100	Milford Haven Inner	Transitional	Moderate
GB511006206900	Teifi Estuary	Transitional	Moderate
GB511006115200	Nyfer Estuary	Transitional	Moderate

Datasource:NRW [Water Framework Directive \(WFD\) Regulations Cycle 3 Classification | DataMapWales](#)

Ground Water Bodies

Water body ID	Water body name	Type	Overall status (WFD)
GB41002G2004 00	Cleddau and Pembrokeshire	Groundwater	Poor
GB41002G2060 00	Pembrokeshire Carboniferous Limestone	Groundwater	Good

Datasource:NRW [Water Framework Directive \(WFD\) Regulations Cycle 3 Classification | DataMapWales](#)

A further two ground water bodies intersect with the National Park boundary but these areas are extremely small, the influence of activities within the National Park are not likely to be significant.

9.3 Water resources

9.3.1 Water availability for licensing is set out in Natural Resources Wales' Abstraction Licensing Strategies. These provide an overview of where and how much water is available for new abstraction licences, taking into account existing abstractions and environmental requirements.

9.3.2 River flows change naturally throughout the year, and the objective is to protect flow variability. Resource availability is calculated at four different flows, Q95 (lowest flows), Q70, Q50 and Q30 (highest flows). This information gives a realistic picture of the current resource availability within a given water body (sub-catchment surface water unit or groundwater unit).

9.3.3 The legal framework provides a very high level of protection to Special Areas of Conservation and Special Protection Areas. Ramsar sites and Sites of Special Scientific Interest also carry a high level of environmental importance. All new licence applications near or within these sites are subject to assessment under the Habitats Directive for potential impacts on site features, alone and in combination with other licences. The Habitats Directive Review of Consents led to some licences being changed and the Eastern and Western Cleddau now have a status of 'No Water Available' (rather than 'Over Licensed').

9.3.4 Natural Resources Wales' *Cleddau and Pembrokeshire Coastal Rivers Abstraction Licensing Strategy* (May 2014) sets out resource

availability for specified assessment points. The published resource availability has not been updated since 2014, but Natural Resources Wales updates the source data in order to advise on applications for new abstraction licences and changes to existing ones.

9.4 Water availability for the assessment points of the Cleddau catchments

Ref	Name	Water Resource availability at Q95
1	Western Cleddau at tidal limit	Water not available for licensing
2	Western Cleddau at Prendergast Mill gauging station	Restricted water available for licensing
3	Western Cleddau at Treffgarne	Restricted water available for licensing
4	Western Cleddau at Castlemorris	Restricted water available for licensing
5	Cartlett Brook	Water available for licensing
6	Anghof at Wolfscastle	Restricted water available for licensing
7	Eastern Cleddau at tidal limit	Water not available for licensing
8	Eastern Cleddau at Canaston Bridge gauging station	Water not available for licensing
9	Eastern Cleddau upstream of Syfynwy	Water not available for licensing
10	Syfynwy upstream of Eastern Cleddau confluence	Water not available for licensing

9.5 Water availability for the assessment points of the Pembrokeshire Coastal Rivers catchments

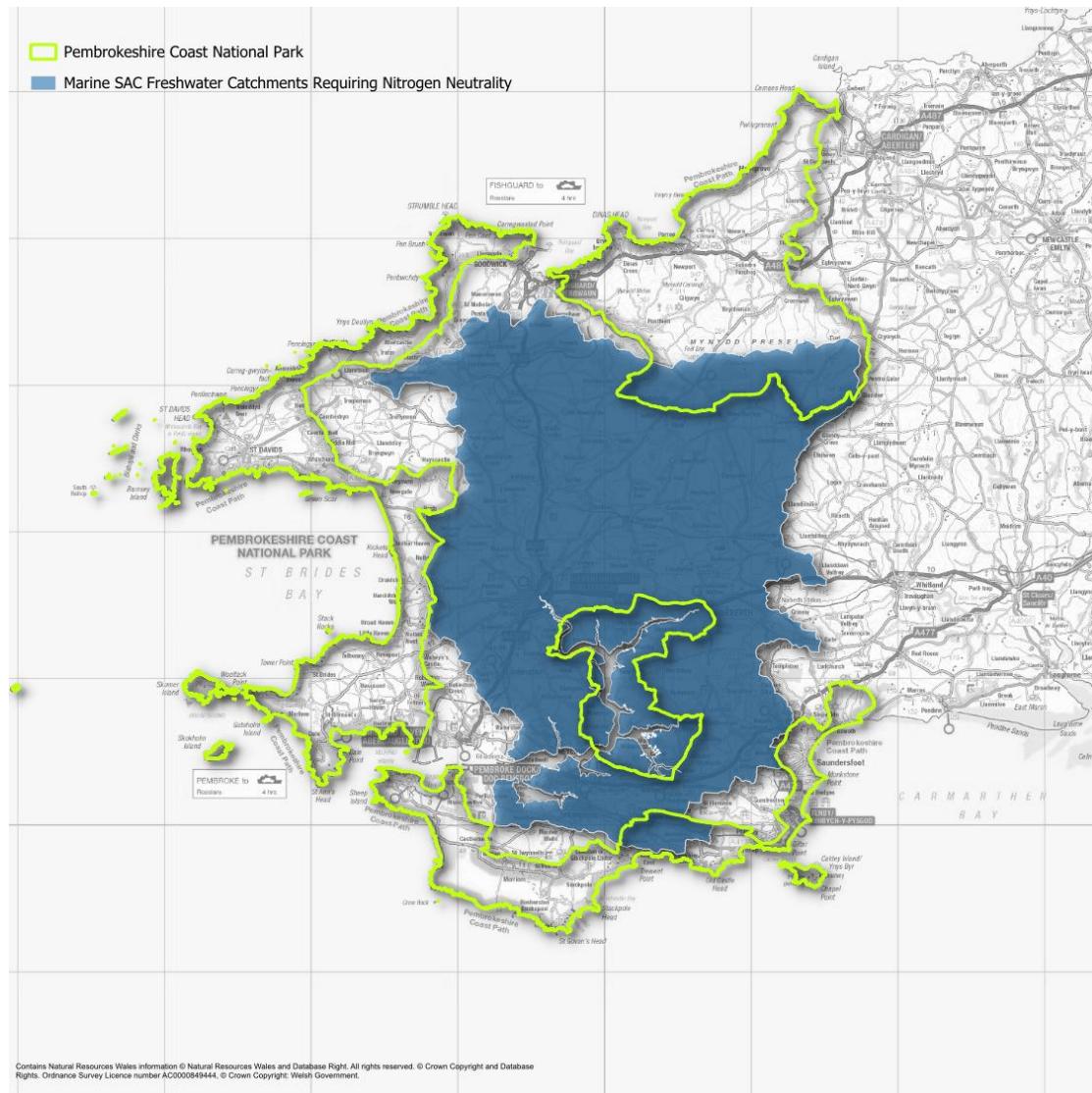
Assessment Point	Name	Water Resource availability at Q95
1	Nevern at tidal limit	Water available for licensing
2	Gwaun at tidal limit	Water available for licensing
3	Gwaun at Cilrhedyn Bridge gauging station	Water available for licensing
4	Alun at St. Davids gauging station	Water available for licensing
5	Solfach at Middle Mill gauging station	Water available for licensing
6	Gann Flats Stream	Water available for licensing
7	Westfield Pill	Water available for licensing
8	Castlemartin Corse	Water available for licensing
9	Ritec	Water available for licensing
10	Cresswell River	Water available for licensing

9.5.1 The Water Resources (Transitional Provisions) Regulations 2017 removed most groundwater exemptions from licensing control. Relevant abstractions in Pembrokeshire are covered by the transitional licensing arrangements.

9.6 Pembrokeshire Marine SAC Condition Assessment and Nutrient Neutrality

9.6.1 In June 2025 Natural Resources Wales (NRW) released detailed assessments of the condition of Marine Special Areas of Conservation (SAC). This report showed that most of the features of the Pembrokeshire Marine SAC are in unfavourable condition, and that nutrient pollution in the form of dissolved inorganic nitrogen is one of the main reasons for

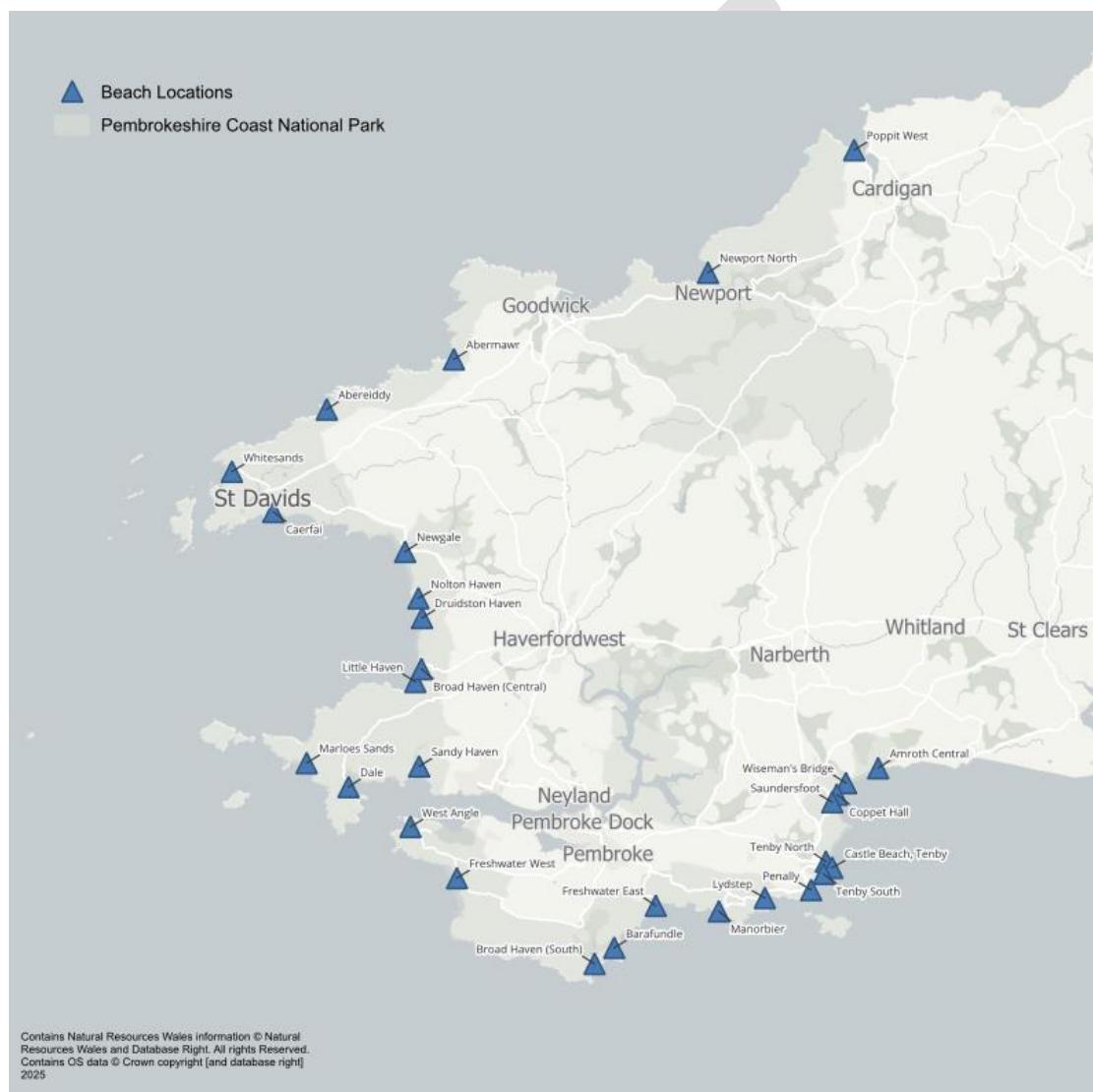
this. Shortly after this a GIS layer was released delineating the catchments that require nutrient neutrality, the largest of these catchments is the Milford Haven Inner catchment, which covers most of Pembrokeshire, including a substantial area of the National Park.



9.7 Bathing Water Quality

9.7.1 Natural Resources Wales carry out bathing water quality assessments at a number of locations throughout Wales between May and September each year; the results are then used to project an annual rating/classification (see below). This rating is based primarily on the concentrations of faecal coliforms present in the water⁹.

Data is collected at 29 locations within the National Park:



⁹ For more information see Natural Resources [Wales Bathing Water Quality web pages](#).

Bathing Water Quality Classification Scale:

Excellent
Good
Sufficient
Poor

9.7.2 In 2022 all of the bathing water locations assessed in the National Park were classified as “Good” or “Excellent” (2 or 3 stars). In 2023, water quality in Tenby North returned to excellent, Amroth dropped to good and Wisemans Bridge dropped to sufficient.

Location / Year	2011	2012	2013	2014	2015	2016	2022	2023	2024
Abereiddy	No classification	Excellent	Excellent						
Abermarwr	No classification	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	No classification	No classification
Amroth Central	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Good
Barafundle	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Broad Haven (Central)	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Broad Haven	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent

Location / Year	2011	2012	2013	2014	2015	2016	2022	2023	2024
(South)									
Caerfai	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Castle Beach , Tenby	Excellent	Excellent	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Coppet Hall	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Dale	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Druidston Haven	No classification	Excellent							
Freshwater East	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Freshwater West	No classification	Excellent							
Little Haven	No classification	Excellent	Excellent	Good	Good	Good	Excellent	Excellent	Excellent
Lydstep	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent

Location / Year	2011	2012	2013	2014	2015	2016	2022	2023	2024
Manorbier	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Marloes Sands	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Newgale	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Newport North	Good	Good	Good	Good	Excellent	Good	Excellent	Excellent	Excellent
Nolton Haven	No classification	Sufficient	Excellent	Good	Good	Sufficient	Excellent	Excellent	Excellent
Penally	No classification	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Poppit West	Excellent	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent
Sandy Haven	No classification	Good	Good	Good	Good	Sufficient	Excellent	Excellent	Excellent
Saundersfoot	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Tenby North	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent

Location / Year	2011	2012	2013	2014	2015	2016	2022	2023	2024
Tenby South	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
West Angle	Excellent	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent
White sands	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Wiseman's Bridge	No classification	Sufficient	Sufficient	Good	Good	Good	Good	Sufficient	Sufficient

Pollution Summary

- Air quality.
- The majority of the Water Framework waters within or partly within the National Park are in “moderate” condition.
- Beach water quality in the National Park is rated as excellent or good on the whole, the only exception being Wiseman’s Bridge which has been rated as “sufficient” for the past two years.
- The Pembrokeshire Marine SAC is largely in unfavourable condition due to nutrient enrichment, with dissolved inorganic nitrogen being the key pollutant.

10 Climate Change

10.1 Overview

10.1.1 Projections by the Met Office indicate that Wales can expect to experience more intense rainfall, more flooding in low-lying and coastal areas along with hotter drier summers.¹⁰

10.1.2 Projections for sea level rise set out in UKCP18¹¹ indicate that, in a moderate scenario, Wales would experience a sea level rise of 0.5m by 2100 with a high scenario of 1m. As a result of this it would be likely that coastal areas of Wales would suffer more frequent and severe flooding, coastal erosion would increase. The risk to infrastructure and communities would increase significantly as well.

10.2 Flooding

10.2.1 Risk of flooding in the National Park is mostly confined to river valleys and certain low lying coastal areas. Flood risk data and maps are provided by Natural Resources Wales in on DataMapWales ([Welsh Government: DataMapWales](#)) and as a interactive web application on the Natural Resources Wales website ([Natural Resources Wales / Check your flood risk on a map \(Flood Risk Assessment Wales Map\)](#)). This dataset, "The Flood Map for Planning", is inclusive of an allowance for climate change.

10.2.2 As of Summer 2025 around 6% of addresses (residential, commercial and industrial) in the National Park are within areas identified as at risk of flooding from rivers or the sea by Natural Resources Wales. A further 1% are in areas identified to be at risk from flooding from surface water and small water courses. The table below provides a break down of the type and zone of risk:

¹⁰ [Natural Resources Wales / Climate change overview](#)

¹¹ [UK Climate Projections \(UKCP\) - Met Office](#)

	Address count	Addresses in a flood zone as a percentage of all address in the National Park
Total Addresses in a River or Sea Flood zone	999	6%

Broken Down into Flood Zone:

	Address Count	Percentage of addresses in flood zone
Flood Zone 2	158	16%
Flood Zone 3	841	84%

10.2.3 The data in the tables above is derived from The Flood Map for Planning (FMfP) and from OS Address Base Core (as accessed on 19/08/2025). Flood zones 2 and 3 are defined as the following:

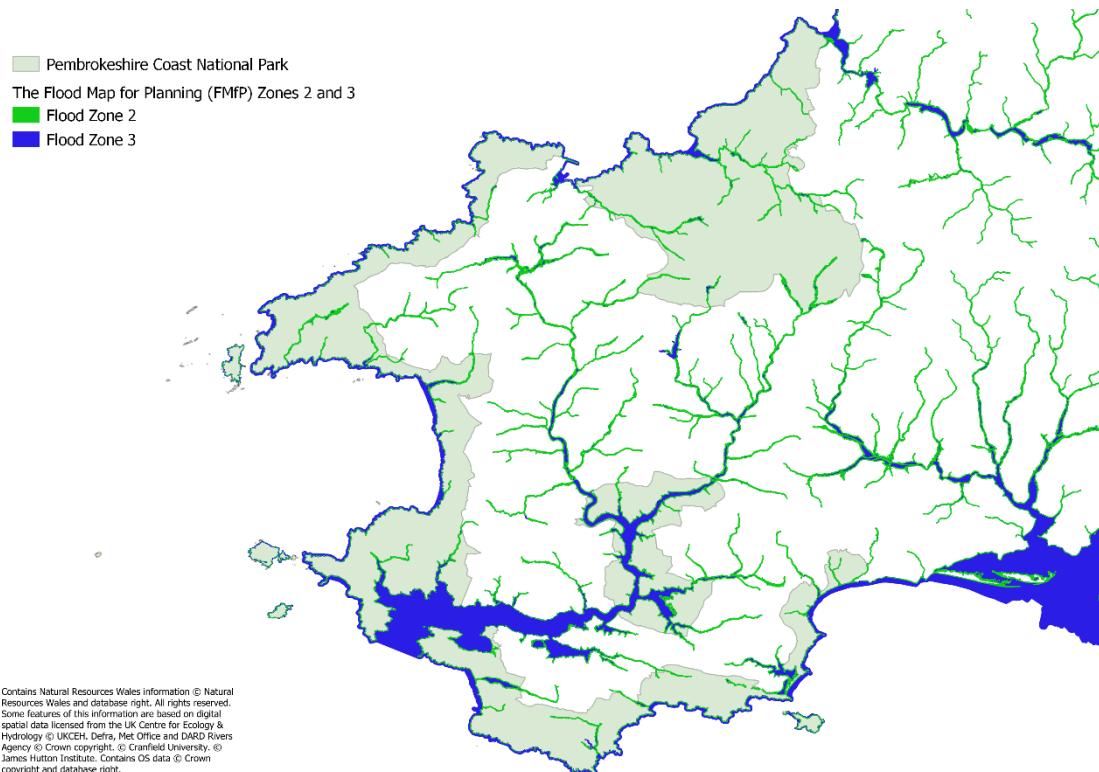
Flood Zone 2:

- Rivers with less than 1% (1 in 100) but greater than or equal to 0.1% (1 in 1,000) chance of happening in any given year, including an allowance for climate change.
- the Sea with less than 0.5% (1 in 200) but greater than or equal to 0.1% (1 in 1,000) chance of flooding in any given year, including an allowance for climate change.
- Surface water & small watercourses with less than 1% (1 in 100) but greater than or equal to 0.1% (1 in 1,000) chance of happening in any given year, including an allowance for climate change.

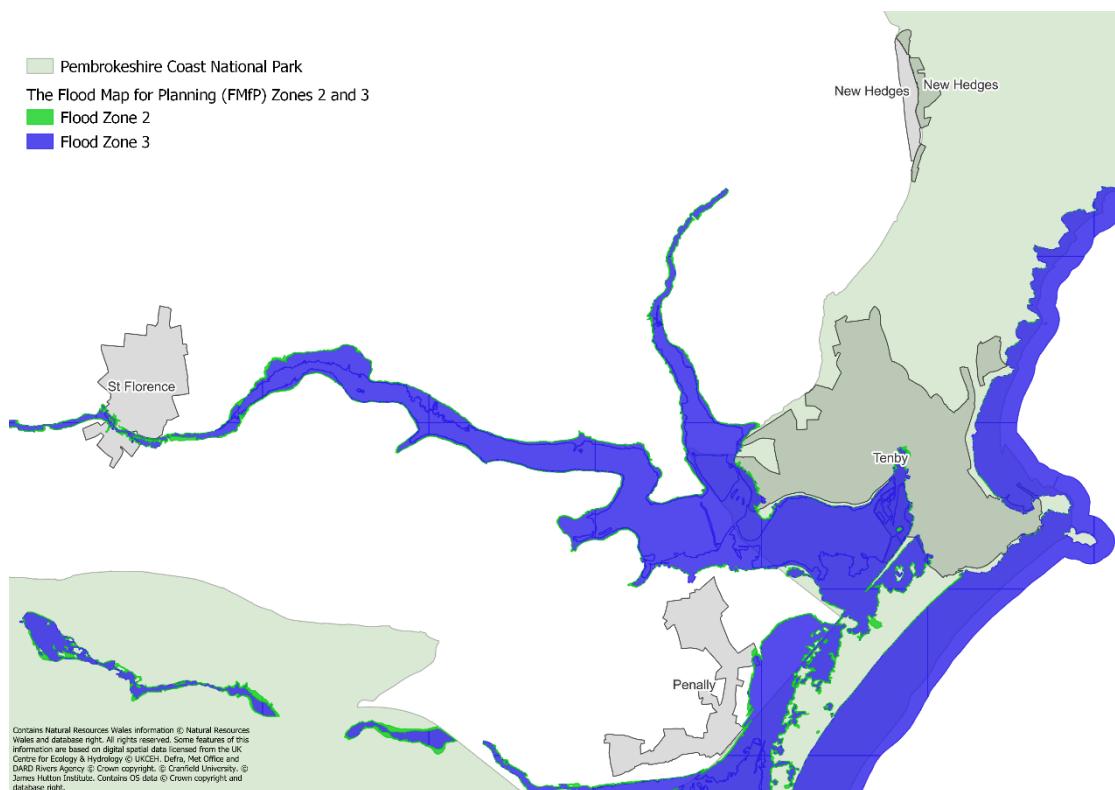
Flood Zone 3:

- rivers with a 1% (1 in 100) chance or greater of happening in any given year, including an allowance for climate change.
- the sea with a 0.5% (1 in 200) chance or greater of happening in any given year, including an allowance for climate change.

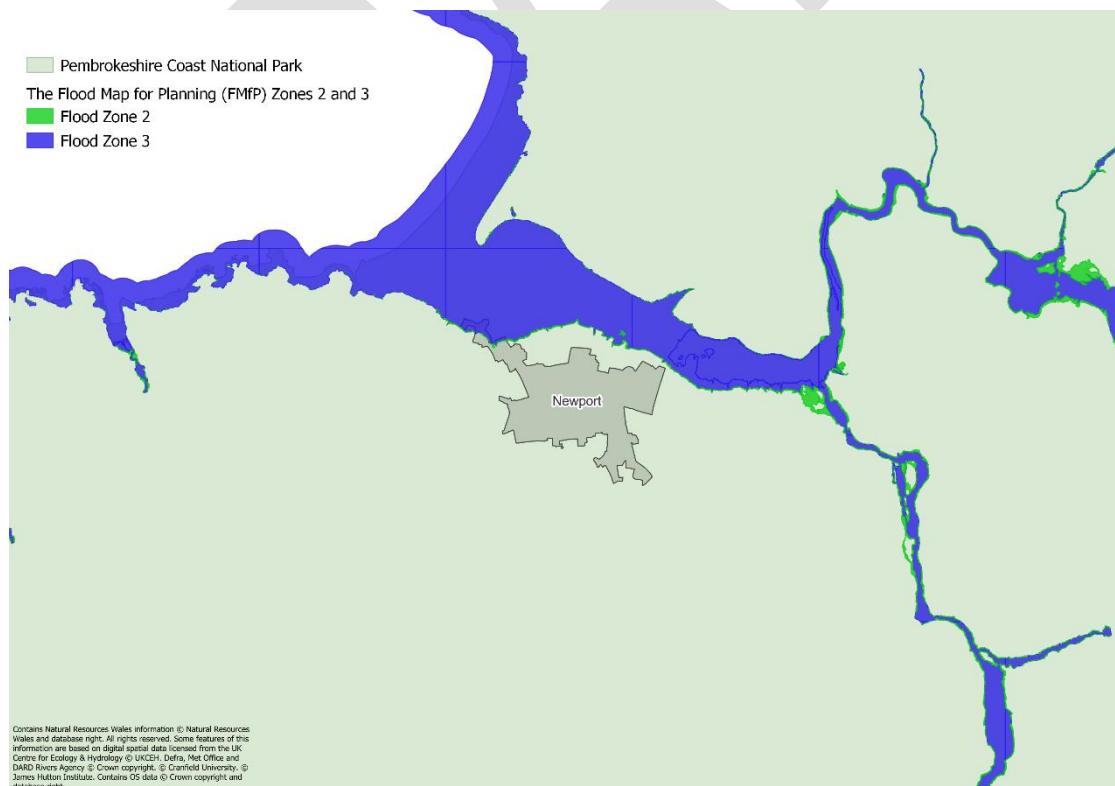
- Surface water & small watercourses with a 1% (1 in 100) chance or greater of happening in any given year, including an allowance for climate change.



Flood Map for Planning flooding zones. Source: Natural Resources Wales (August 2025)



Flood Map for Planning flooding zones Tenby area. Source: Natural Resources Wales (August 2025)



Flood Map for Planning flooding zones Newport area. Source: Natural Resources Wales (August 2025)

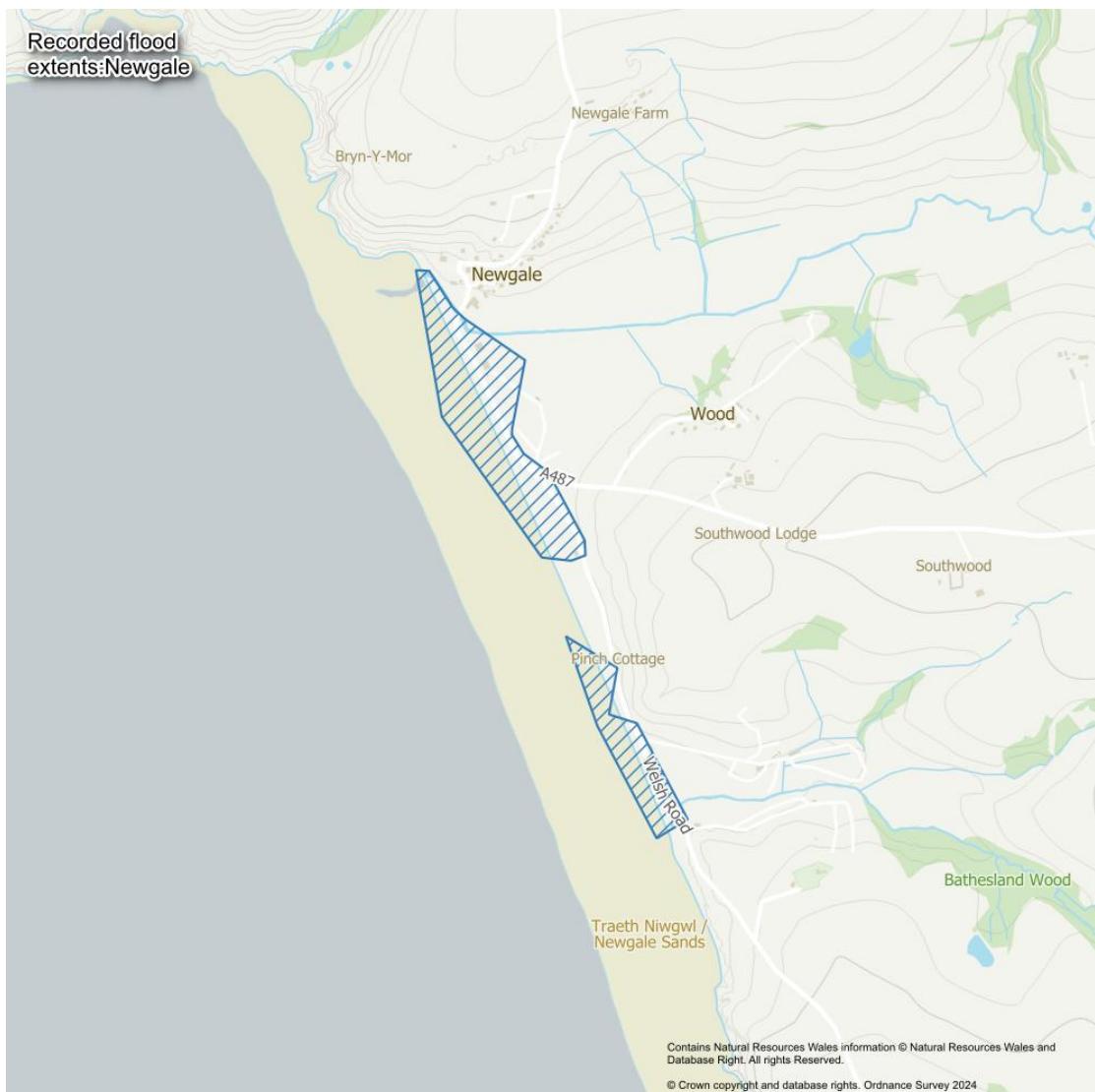
For the most current flood risk information places [Natural Resources Wales / Flood map for planning / development advice map](#).

10.3 Historic flooding

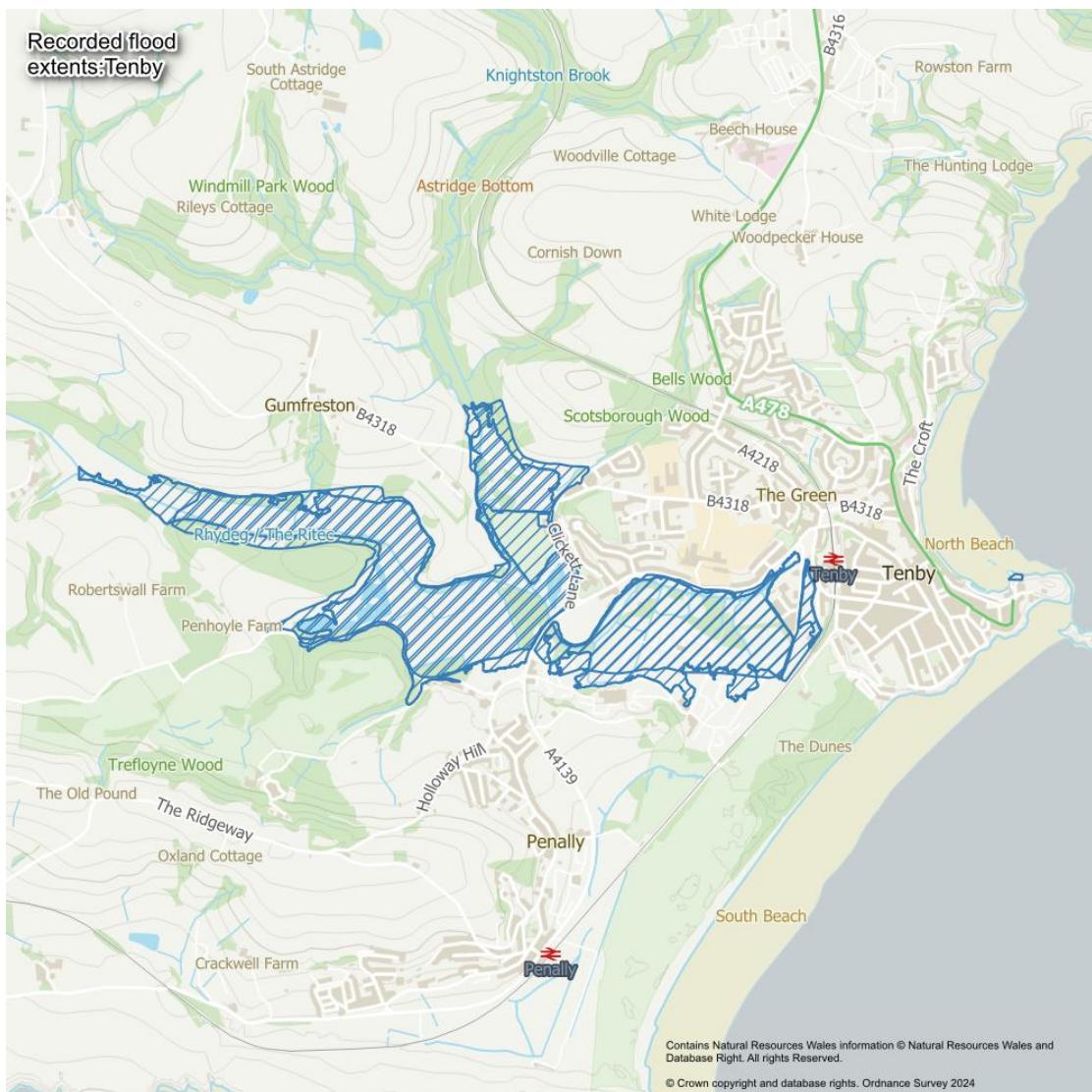
10.3.1 Natural Resource Wales hold some data on recorded, historic, flood extents. The maps below are of some key locations within the National Park showing the extents of past flooding events.

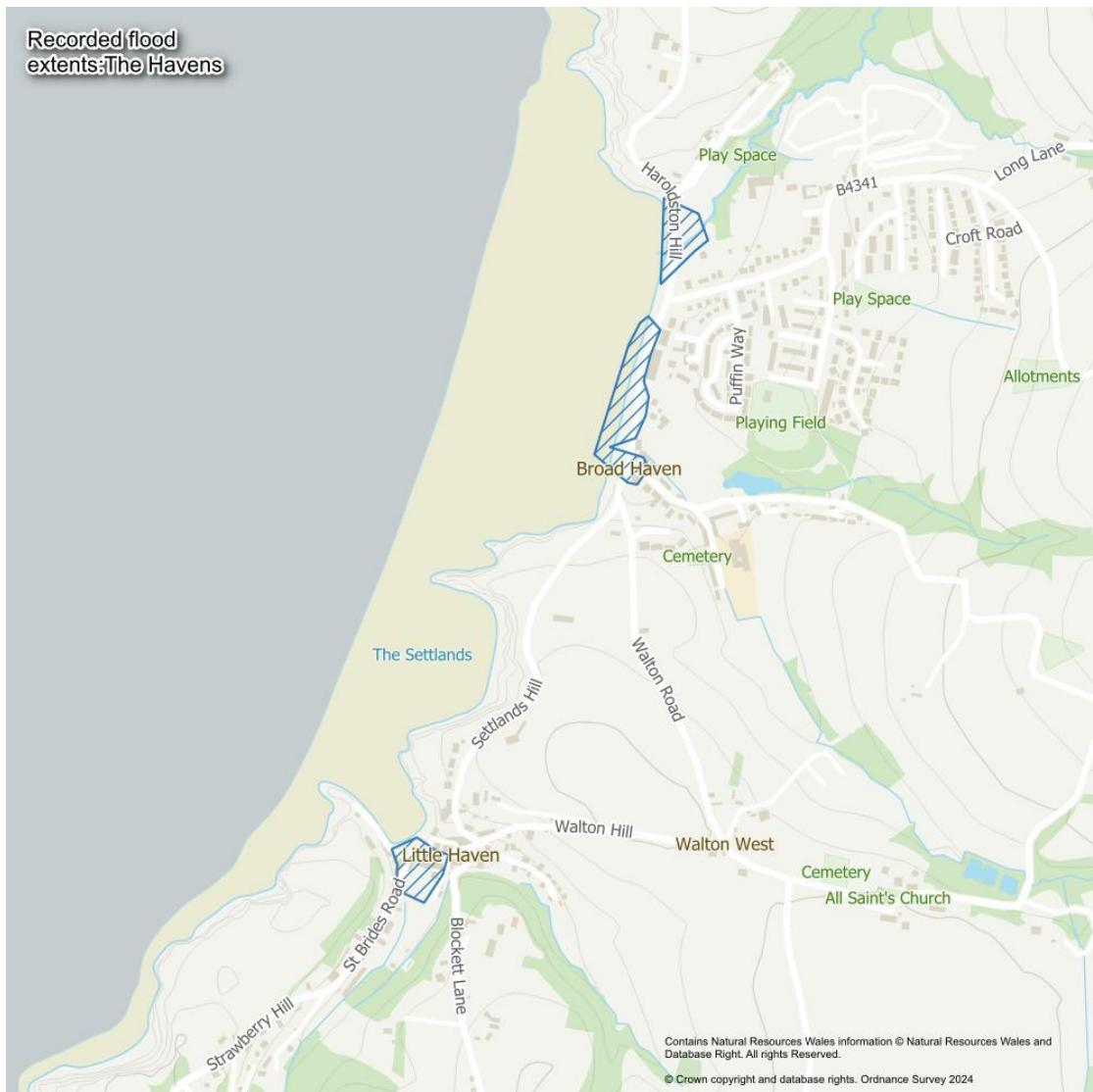
Data source: Natural Resources Wales ([Recorded Flood Extents | DataMapWales](#))





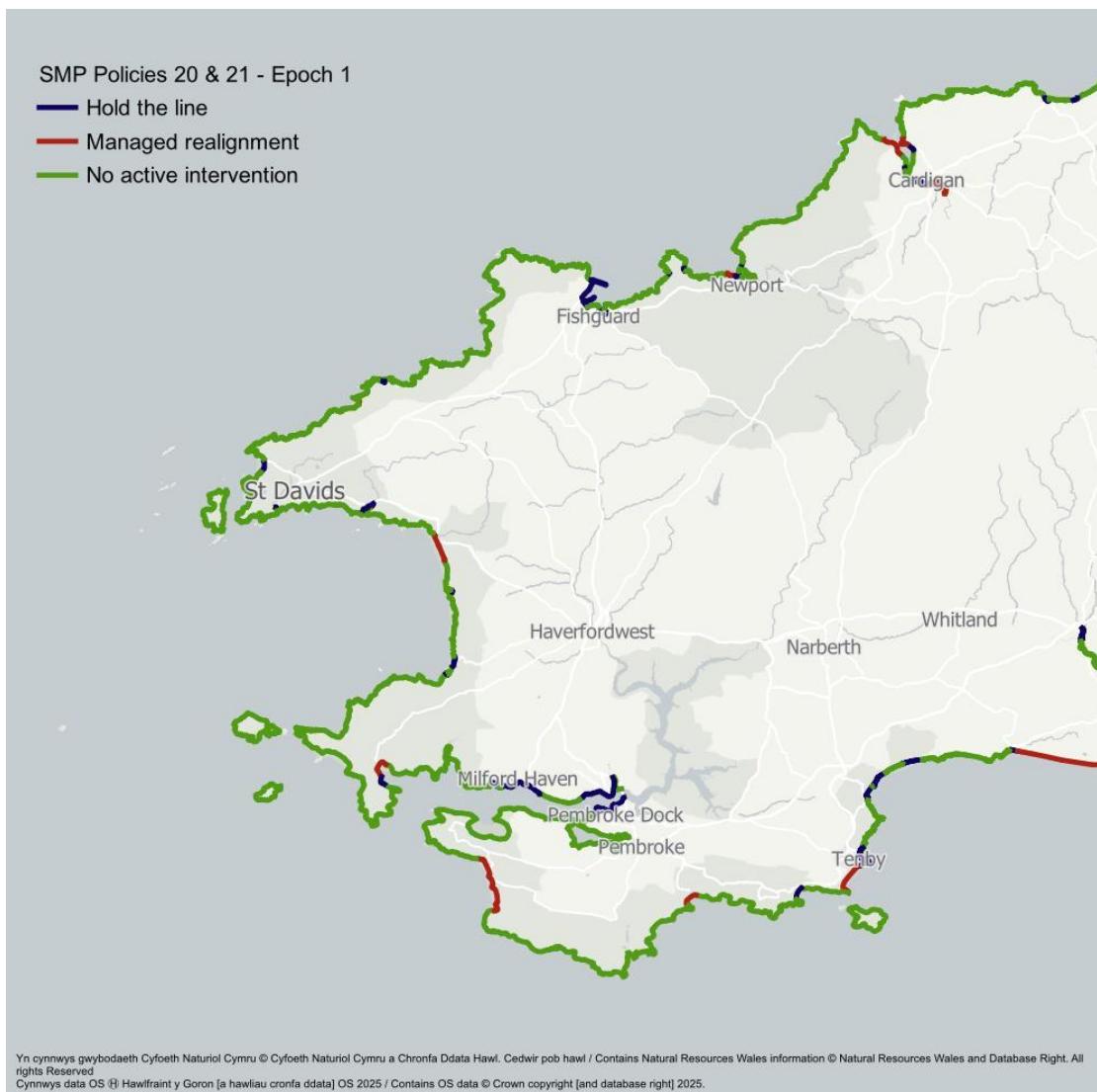






10.4 Shoreline Management Plan (SMP)

10.4.1 The Shoreline Management Plan sets out the strategic policy direction for the management of the risks associated with coastal processes, with the aim to reduce the risks to people, development, and the historic and natural environments. The coastal processes considered include: tidal patterns, wave height, wave direction and the movement of beach and seabed materials. The map below shows the policy approach for sections of the coast of Pembrokeshire in the short term (epoch 1 –20 years).



Data source: NRW [Shoreline Management Plan Policies | DataMapWales](#)

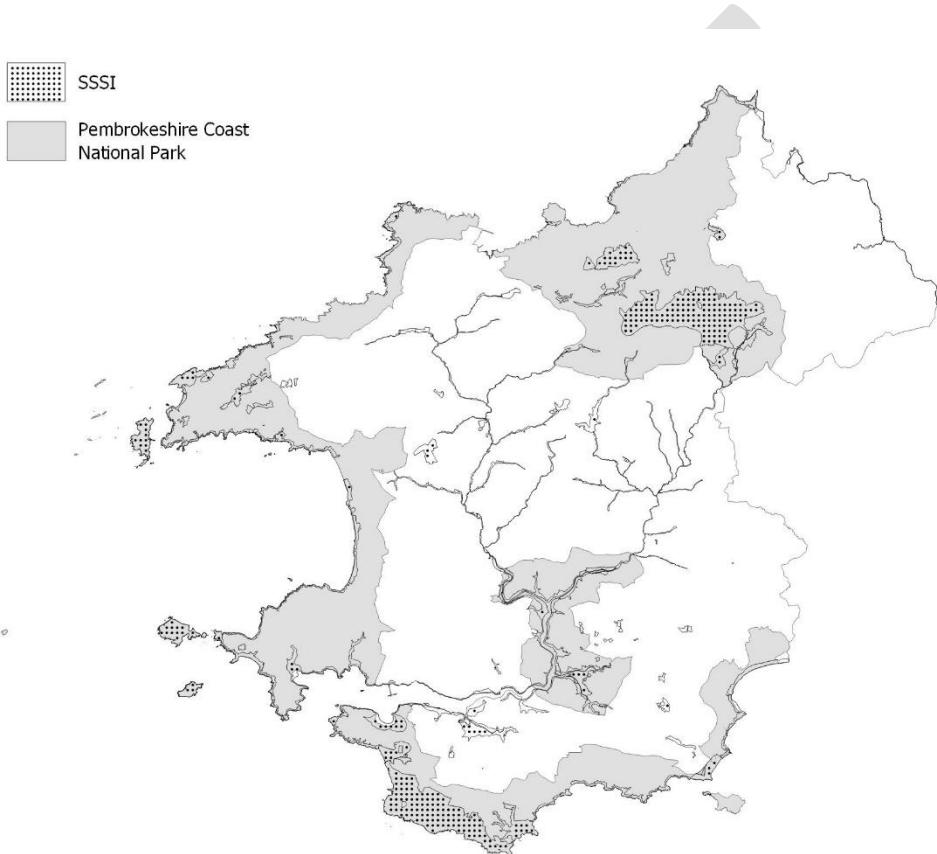
Climate Change Summary

- The projected impacts of climate change for Wales are:
 - More intense rainfall and flooding
 - Hotter, drier summers
 - Sea level rise.
- Flooding:
 - ~6% of the addresses in the National Park are at risk from flooding from rivers or the sea, with an additional 1% of addresses at risk from surface water flooding
 - 84% of the address at risk from flooding from rivers or the sea are within Floodzone 3
 - 16% of the address at risk from flooding from rivers or the sea are within Floodzone 2.

11 Biodiversity

11.1.1 The Pembrokeshire Coast National Park contains, either entirely or in part, 60 Sites of Special Scientific Interest (SSSIs), five Special Protection Areas (SPAs), and 12 Special Areas of Conservation (SACs).

11.1.2 The following map shows the location of SSSIs in and around the Pembrokeshire Coast National Park.



11.2 Sites of Special Scientific Interest (SSSI)

11.2.1 The most recent data on the condition of SSSIs, NRW 2021¹², indicates that only 14% of the SSSIs in the National Park are in favourable condition.

11.3 NatureNetwork sites

¹² https://www.cnp.org.uk/wp-content/uploads/2024/04/National-Parks-Health-Check-Report-Nature-Recovery-2024.pdf?utm_source=chatgpt.com

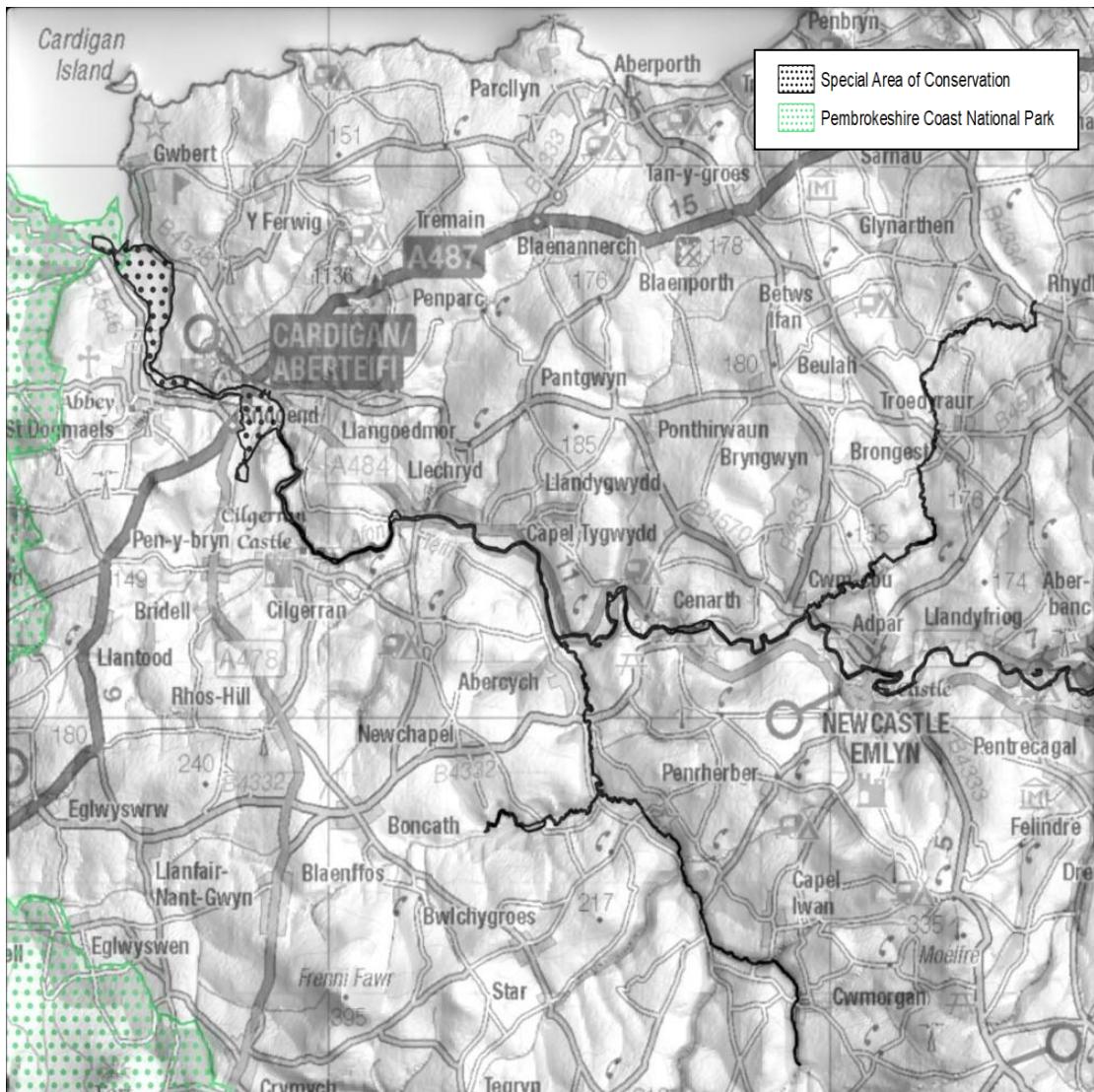
11.3.1 Information on the national site network sites - Special Areas of Conservation (SACs) and Special Protection Areas (SPAs) - has been provided by Natural Resources Wales, or obtained from the website of the Joint Nature Conservation Committee. More information on national site network sites in the area of and surrounding the National Park can be found in the Screening and Appropriate Assessment reports of the Habitat Regulations Assessment of the Pembrokeshire Coast National Park Local Development Plan.

11.4 Special Areas of Conservation

UK0012670 Afon Teifi / River Teifi

General site character

Tidal rivers. Estuaries. Mud flats. Sand flats. Lagoons (including saltwork basins) (20%); Salt marshes. Salt pastures. Salt steppes (1.7%); Inland water bodies (standing water, running water) (45.1%); Bogs. Marshes. Water fringed vegetation. Fens (8.9%); Heath. Scrub. Maquis and garrigue. Phygrana (2.7%); Humid grassland. Mesophile grassland (1.7%); Improved grassland (7.5%); Broad-leaved deciduous woodland (10.5%); Inland rocks. Scree. Sands. Other land (including towns, villages, roads, waste places, mines, industrial sites) (0.8%).



Map A1.1: Afon Teifi / River Teifi SAC

Feature	Condition
3260 Water courses of plain to montane levels with the <i>Ranunculion fluitantis</i> and <i>Callitricho-Batrachion</i> vegetation	Favourable: Unclassified
3130 Oligotrophic to mesotrophic standing waters with vegetation of the <i>Littorelletea uniflorae</i> and/or of the <i>Isoëto-Nanojuncetea</i>	Favourable: Unclassified
1096 Brook lamprey <i>Lampetra planeri</i>	Unfavourable: Recovered
1099 River lamprey <i>Lampetra fluviatilis</i>	Unfavourable: Recovered
1106 Atlantic salmon <i>Salmo salar</i>	Unfavourable: No change
1163 Bullhead <i>Cottus gobio</i>	Unknown
1355 Otter <i>Lutra lutra</i>	Unfavourable
1831 Floating water-plantain <i>Luronium natans</i>	Favourable: maintained
1095 Sea lamprey <i>Petromyzon marinus</i>	Unfavourable: Unclassified

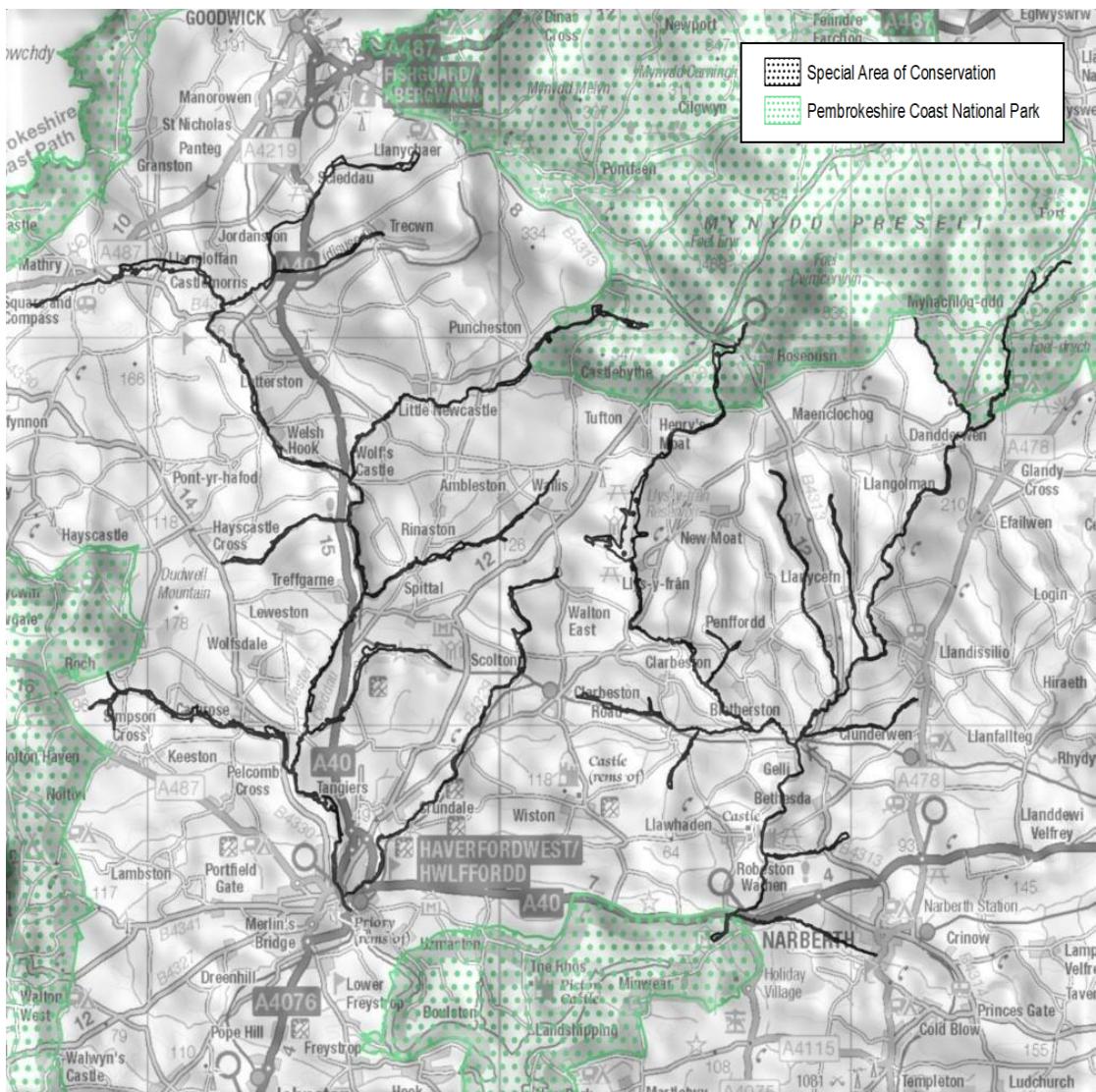
Feature	Condition
3260 Water courses of plain to montane levels with the <i>Ranunculion fluitantis</i> and Callitricho-Batrachion vegetation	Favourable: Maintained
7110 Active raised bogs	Unfavourable: Un-classified
91E0 Alluvial forests with <i>Alnus glutinosa</i> and <i>Fraxinus excelsior</i> (Alno-Padion, Alnion incanae, Salicion albae)	Unfavourable: Un-classified

More information: [Joint Nature Conservation Committee: Afon Teifi / River Teifi. NRW have commented that they need to confirm the condition of the river features which has not yet been checked.](#)

UK0030074 Afonydd Cleddau / Cleddau Rivers

General site character

- Inland water bodies (Standing water, Running water) (26%)
- Bogs, Marshes, Water fringed vegetation, Fens (17%)
- Heath, Scrub, Maquis and Garrigue, Phygrana (17%)
- Dry grassland, Steppes (2%)
- Improved grassland (9%)
- Other arable land (0.3%)
- Broad-leaved deciduous woodland (26%)
- Coniferous woodland (2%)
- Mixed woodland (0.2%)
- Other land (including Towns, Villages, Roads, Waste places, Mines, Industrial sites) (0.5%)



Map A1.2 Afonydd Cleddau / Cleddau Rivers SAC

Feature	Condition
3260 Water courses of plain to montane levels with the Ranunculion fluitantis and Callitricho-Batrachion vegetation	Unfavourable
7110 Active raised bogs * Priority feature	Unfavourable
91E0 Alluvial forests with Alnus glutinosa and Fraxinus excelsior (Alno-Padion, Alnion incanae, Salicion albae) * Priority feature	Unfavourable
1096 Brook lamprey <i>Lampetra planeri</i>	Unfavourable
1099 River lamprey <i>Lampetra fluviatilis</i>	Unfavourable
1163 Bullhead <i>Cottus gobio</i>	Unfavourable
1355 Otter <i>Lutra lutra</i>	Unfavourable
1095 Sea lamprey <i>Petromyzon marinus</i>	Unfavourable

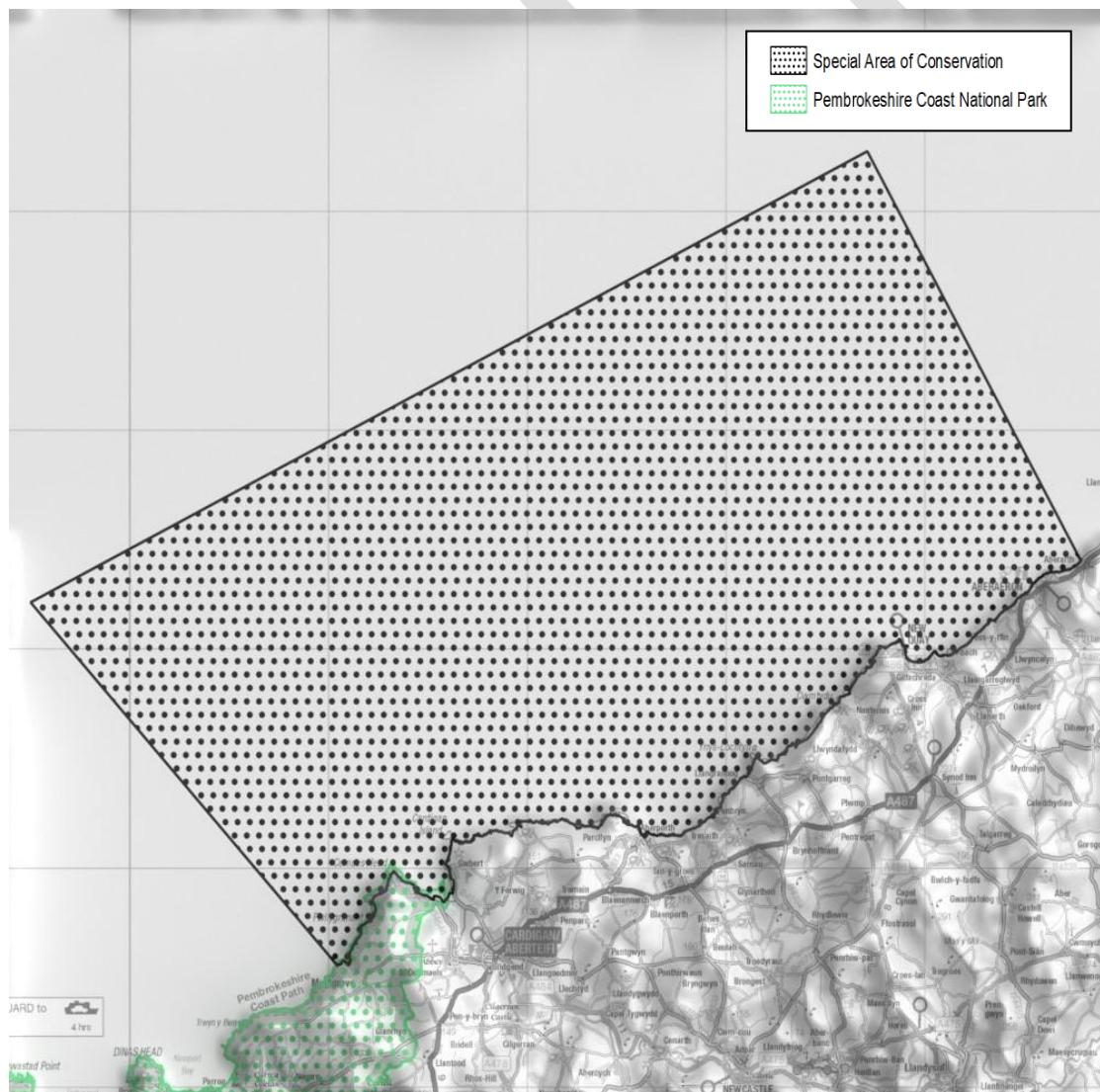
Feature	Condition
3260 <u>Water courses of plain to montane levels with the <i>Ranunculion fluitantis</i> and Callitricho-Batrachion vegetation</u>	Favourable: Maintained
7110 <u>Active raised bogs</u>	Unfavourable

More information: [Joint Nature Conservation Committee: Afonydd Cleddau / Cleddau Rivers](#)

UK0012712 Cardigan Bay / Bae Ceredigion

General site character

Marine areas. Sea inlets (99.5%); Coastal sand dunes. Sand beaches. Machair (0.01%); Shingle. Sea cliffs. Islets (0.39%); Inland water bodies (standing water, running water) (0.01%); Heath. Scrub. Maquis and garrigue. Phygrana (0.07%); Broad-leaved deciduous woodland (0.02%).



Map A1.3 Cardigan Bay/ Bae Ceredigion SAC

Feature	Condition
1110 Sandbanks which are slightly covered by sea water all the time	Unfavourable
1170 Reefs	Unfavourable
8330 Submerged or partially submerged sea caves	Favourable
1349 Bottlenose dolphin <i>Tursiops truncatus</i>	Favourable
1095 Sea lamprey <i>Petromyzon marinus</i>	Unfavourable
1099 River lamprey <i>Lampetra fluviatilis</i>	Unfavourable
1364 Grey seal <i>Halichoerus grypus</i>	Favourable

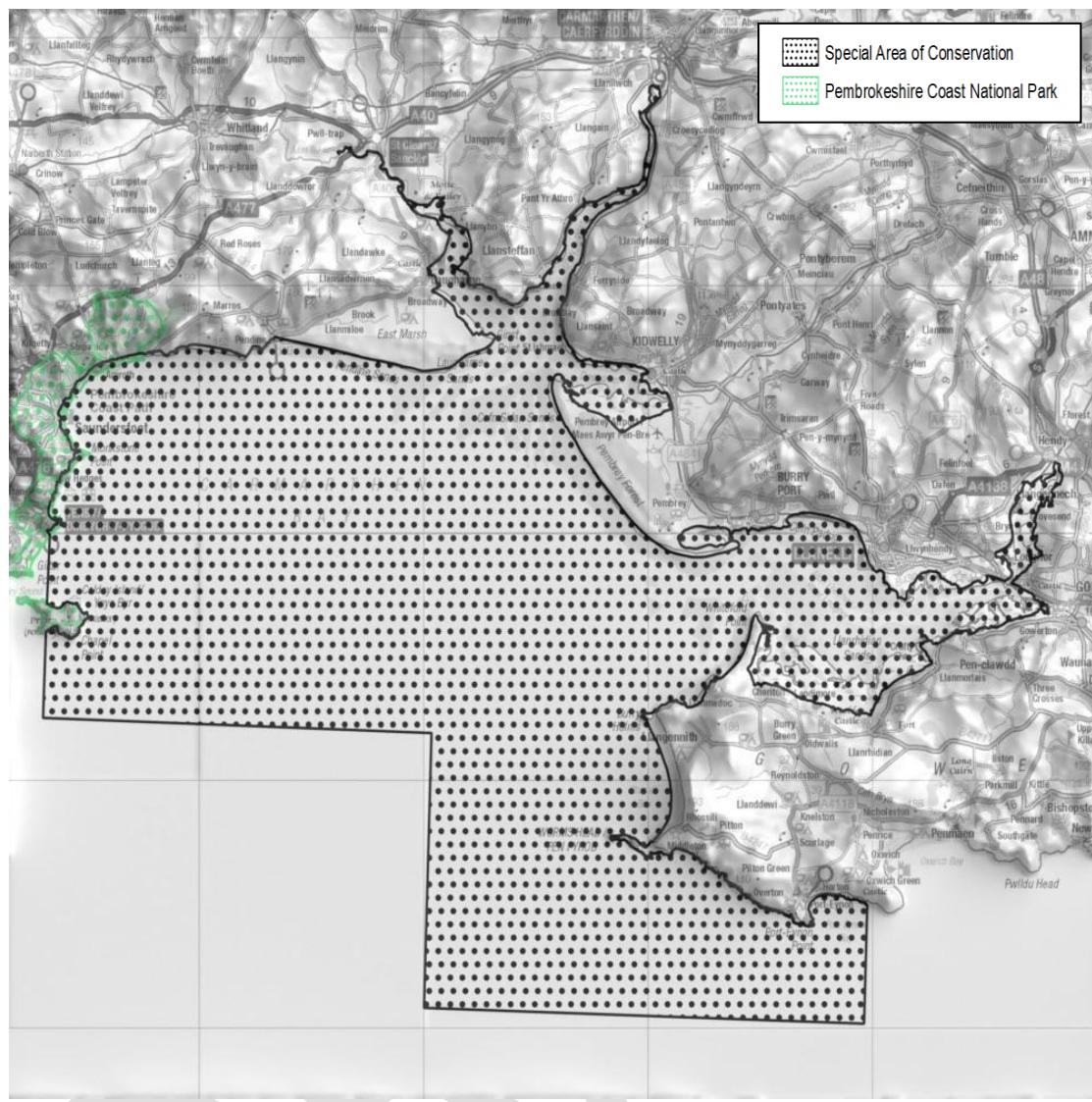
condition and trend information is provisional

More information: [Joint Nature Conservation Committee: Cardigan Bay / Bae Ceredigion](#)

UK0020020 Carmarthen Bay and Estuaries / Bae Caerfyrddin ac Aberoedd

General site character

Marine areas. Sea inlets (82.1%); Tidal rivers. Estuaries. Mud flats. Sand flats. Lagoons (including saltwork basins) (13.7%); Salt marshes. Salt pastures. Salt steppes (4.1%); Shingle. Sea cliffs. Islets (0.1%).



Map A1.4: Carmarthen Bay and Estuaries / Bae Caerfyrddin ac Aberoedd SAC

Feature	Condition
1110 Sandbanks which are slightly covered by sea water all the time	Favourable
1130 Estuaries	Favourable
1140 Mudflats and sandflats not covered by seawater at low tide	Favourable
1160 Large shallow inlets and bays	Favourable
1310 Salicornia and other annuals colonising mud and sand	Favourable
1330 Atlantic salt meadows (<i>Glauco-Puccinellietalia maritimae</i>)	Unfavourable
1103 Twaite shad <i>Alosa fallax</i>	Unfavourable: No Change
1095 Sea lamprey <i>Petromyzon marinus</i>	Unfavourable

Feature	Condition
1099 <u>River lamprey</u> <i>Lampetra fluviatilis</i>	Unfavourable
1102 <u>Allis shad</u> <i>Alosa alosa</i>	Unfavourable: No Change
1355 <u>Otter</u> <i>Lutra lutra</i>	Unfavourable

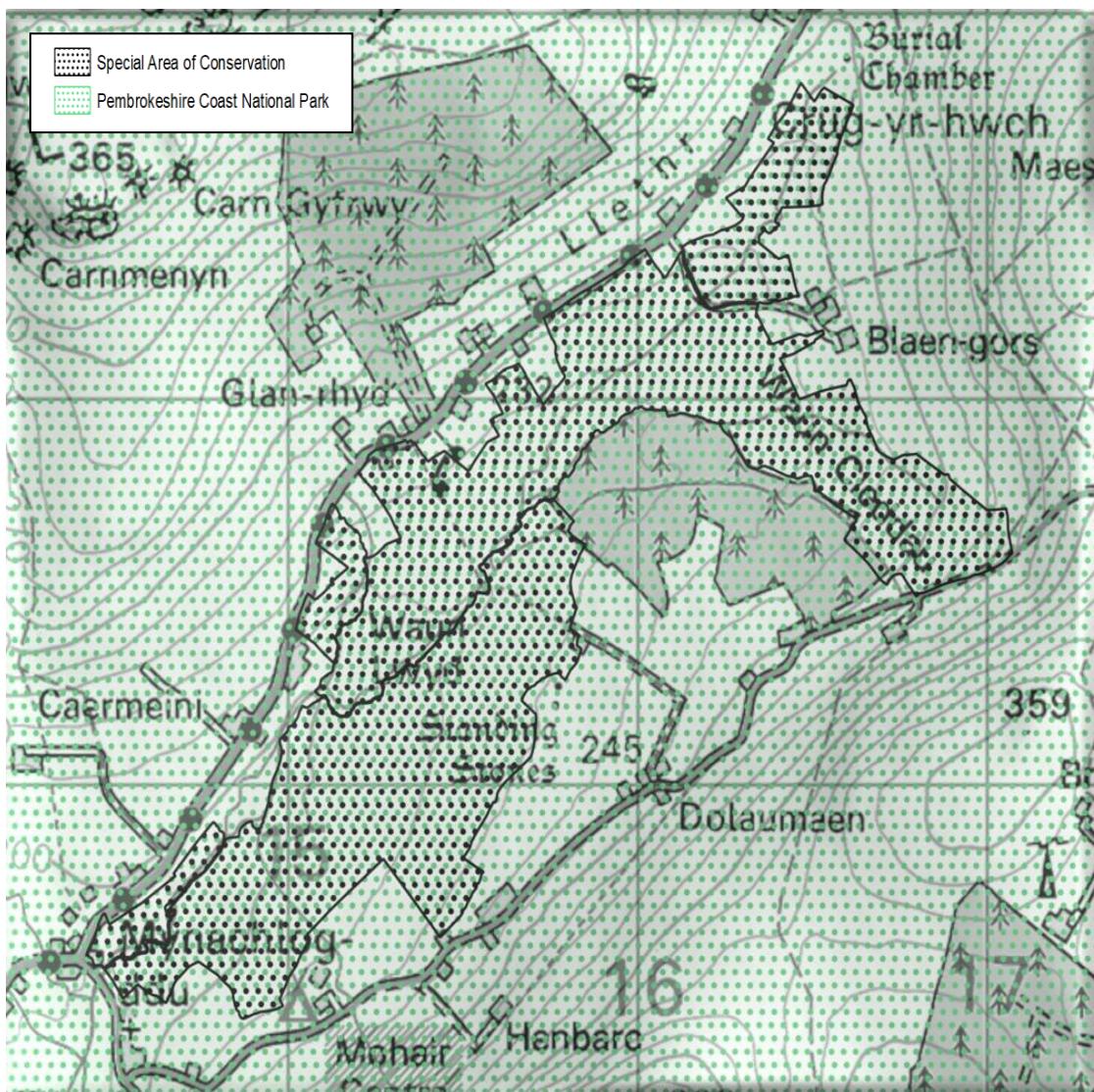
condition and trend information is provisional

More information: [Joint Nature Conservation Committee: Carmarthen Bay and Estuaries / Bae Caerfyrddin ac Aberoedd](#)

UK0030144 Gweunydd Blaencleddau

General site character

- Bogs, Marshes, Water fringed vegetation, Fens (19%)
- Heath, Scrub, Maquis and Garrigue, Phygrana (10%)
- Dry grassland, Steppes (1.5%)
- Humid grassland, Mesophile grassland (54.5%)
- Improved grassland (5%)
- Broad-leaved deciduous woodland (9.5%)
- Other land (including Towns, Villages, Roads, Waste places, Mines, Industrial sites) (0.5%)



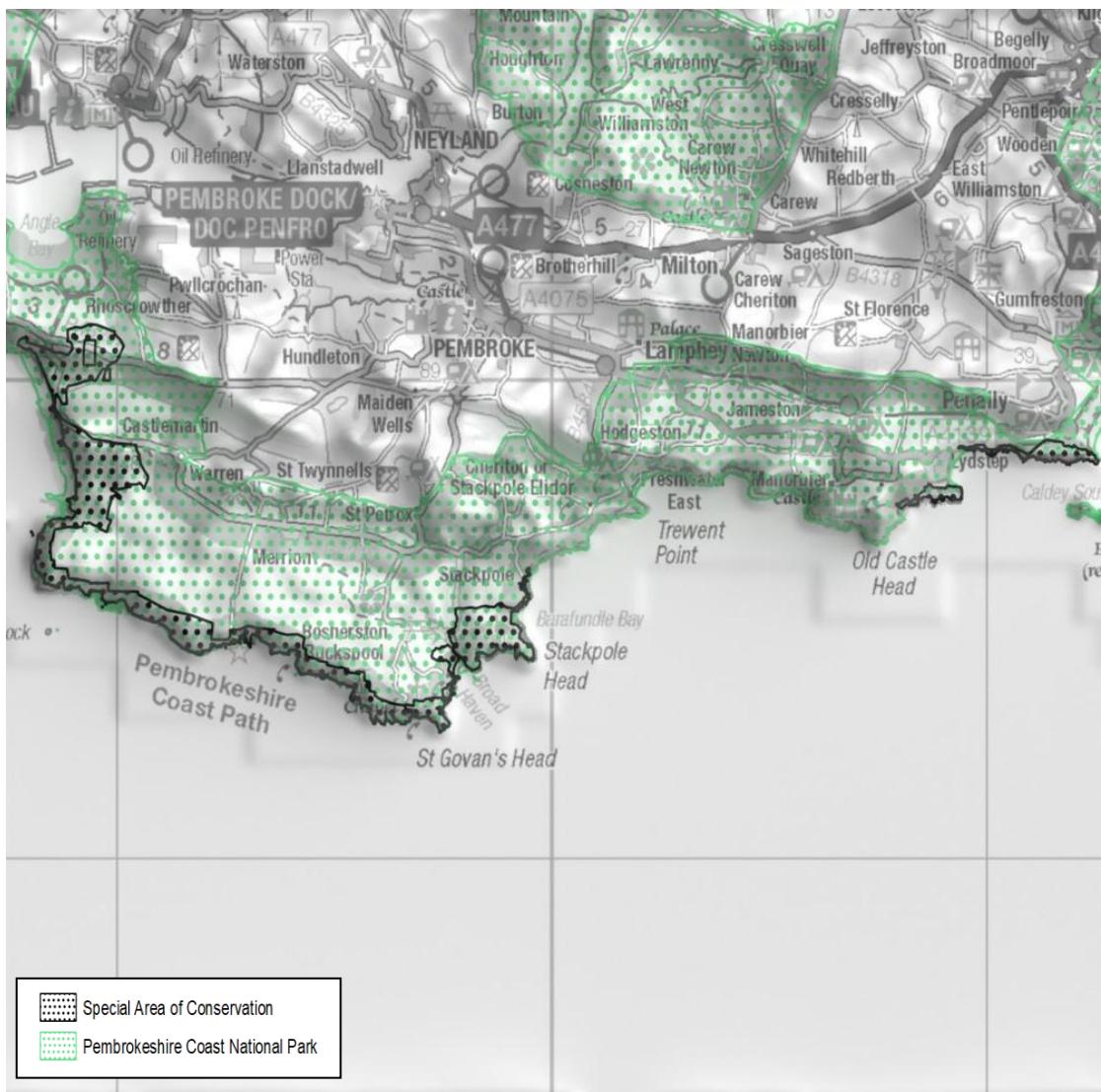
Map A1.5: Gweunydd Blaencleddau SAC

Feature	Condition
4010 Northern Atlantic wet heaths with <i>Erica tetralix</i>	Unfavourable: Recovering
7130 Blanket bogs	Unfavourable: Recovering
6410 Molinia Meadows	Unfavourable: Declining
7140 Transition mires and quaking bogs	Unfavourable: No change
7230 Alkaline fens	Unfavourable
1065 Marsh fritillary butterfly <i>Euphydryas (Eurodryas, Hypodryas) aurinia</i>	Unfavourable
1044 Southern damselfly <i>Coenagrion mercuriale</i>	Unfavourable: Unclassified

More information: [Joint Nature Conservation Committee: Gweunydd Blaencleddau](#)

UK0014787 Limestone Coast of South West Wales / Arfordir Calchfaen De Orllewin Cymru
General site character

- Tidal rivers, Estuaries, Mud flats, Sand flats, Lagoons (including saltwork basins) (15%)
- Coastal sand dunes, Sand beaches, Machair (27%)
- Shingle, Sea cliffs, Islets (22%)
- Inland water bodies (Standing water, Running water) (1%)
- Bogs, Marshes, Water fringed vegetation, Fens (1%)
- Heath, Scrub, Maquis and Garrigue, Phygrana (14%)
- Dry grassland, Steppes (2%)
- Humid grassland, Mesophile grassland (10%)
- Broad-leaved deciduous woodland (1%)
- Coniferous woodland (1%)
- Other land (including Towns, Villages, Roads, Waste places, Mines, Industrial sites) (6%)



Map A1.6 Limestone Coast of South West Wales / Arfordir Calchfaen De Orllewin Cymru SAC (the SAC also includes sections of the Gower coast between Worm's Head and Pwlldu Head)

Feature	Condition
1230 Vegetated sea cliffs of the Atlantic and Baltic coasts	Unfavourable: Un-classified
2130 Fixed dunes with herbaceous vegetation ('grey dunes')	Favourable
4030 European dry heaths	Unfavourable: Unclassified
6210 Semi-natural dry grasslands and scrubland facies: on calcareous substrates (Festuco-Brometalia)	Unfavourable: Un-classified
8310 Caves not open to the public	Favourable
8330 Submerged or partially submerged sea caves	Favourable: Maintained

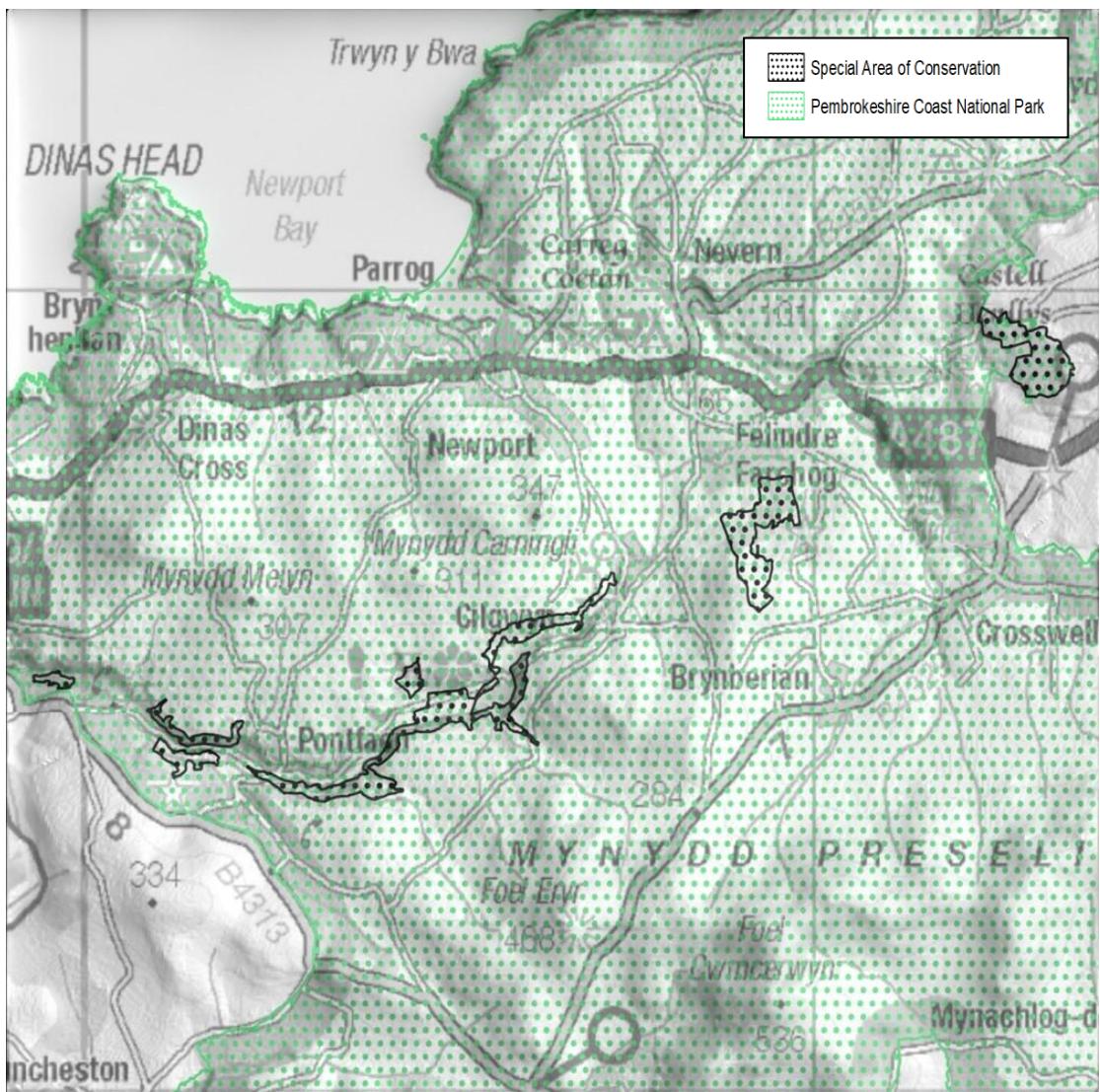
1304 <u>Greater horseshoe bat</u> <i>Rhinolophus ferrumequinum</i>	Favourable
1654 <u>Early gentian</u> <i>Gentianella anglica</i>	Unfavourable: No-change
1395 <u>Petalwort</u> <i>Petalophyllum ralfsii</i>	Favourable: Maintained

More information: [Joint Nature Conservation Committee: Limestone Coast of South West Wales / Arfordir Calchfaen De Orllewin Cymru](#)

UK0030227 North Pembrokeshire Woodlands / Coedydd Gogledd Sir Benfro

General site character

- Inland water bodies (Standing water, Running water) (0.3%)
- Bogs, Marshes, Water fringed vegetation, Fens (0.6%)
- Heath, Scrub, Maquis and Garrigue, Phygrana (13%)
- Dry grassland, Steppes (3%)
- Humid grassland, Mesophile grassland (9%)
- Broad-leaved deciduous woodland (70%)
- Inland rocks, Scree, Sands (0.1%)
- Other land (including Towns, Villages, Roads, Waste places, Mines, Industrial sites) (4%)



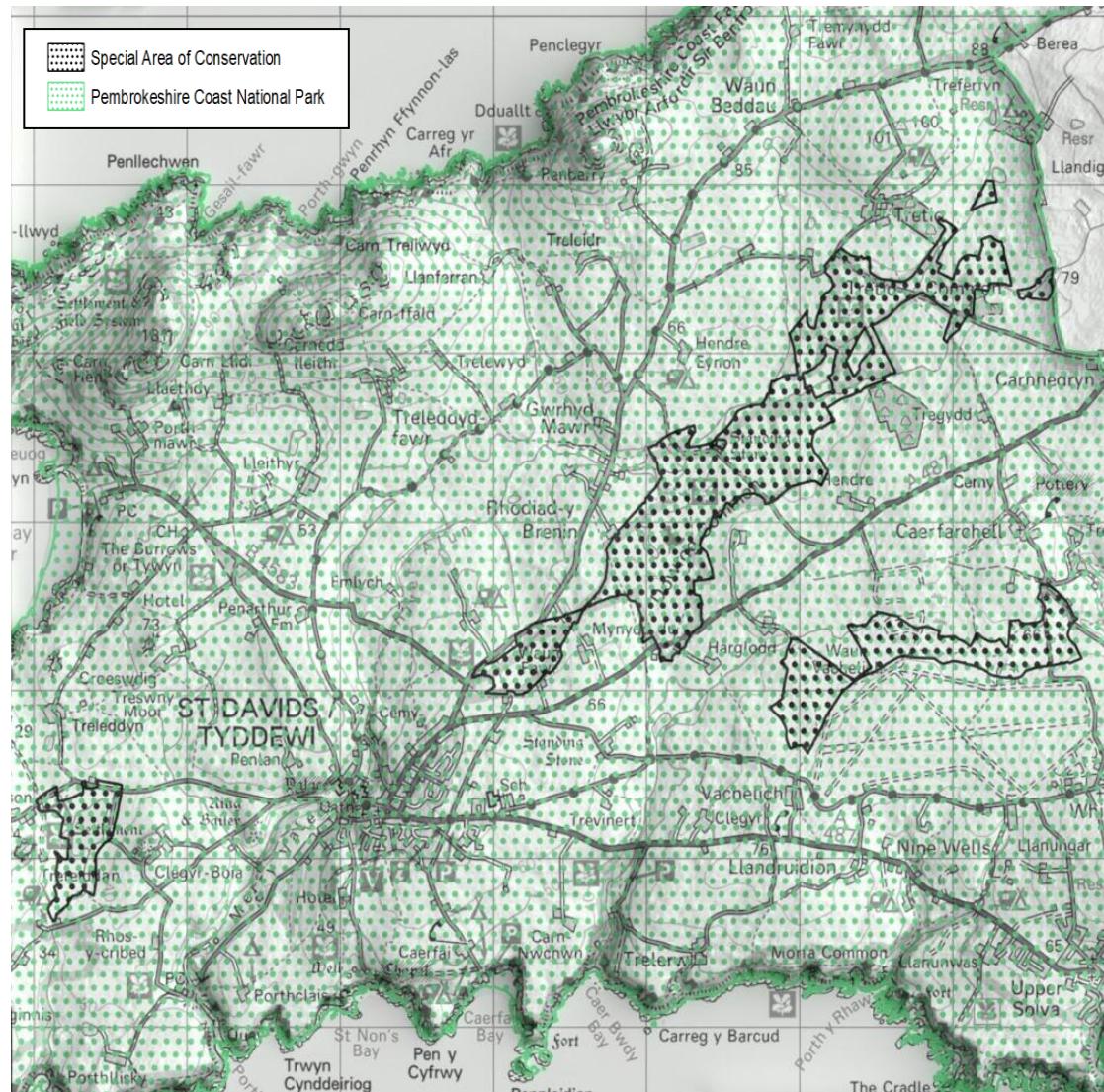
Map A1.7 Pembrokeshire Woodlands / Coedydd Gogledd Sir Benfro SAC

Feature	Condition
91A0 <u>Old sessile oak woods with <i>Ilex</i> and <i>Blechnum</i> in the British Isles</u>	Unknown
91E0 <u>Alluvial forests with <i>Alnus glutinosa</i> and <i>Fraxinus excelsior</i> (Alno-Padion, Alnion incanae, Salicion albae)</u>	Unfavourable
1308 <u>Barbastelle</u> <i>Barbastella barbastellus</i>	Unknown

More information: [Joint Nature Conservation Committee: North Pembrokeshire Woodlands / Coedydd Gogledd Sir Benfro](#)

UK0030229 North West Pembrokeshire Commons / Comin Gogledd
Orllewin Sir Benfro
General site character

Inland water bodies (standing water, running water) (0.3%); Bogs. Marshes. Water fringed vegetation. Fens (14.4%); Heath. Scrub. Maquis and garrigue. Phygrana (29.7%); Dry grassland. Steppes (0.2%); Humid grassland. Mesophile grassland (42%); Improved grassland (0.4%); Broad-leaved deciduous woodland (11.6%); Other land (including towns, villages, roads, waste places, mines, industrial sites) (1.4%).



**Map A1.8: North West Pembrokeshire Commons/ Comins Gogledd
Orllewin Sir Benfro SAC**

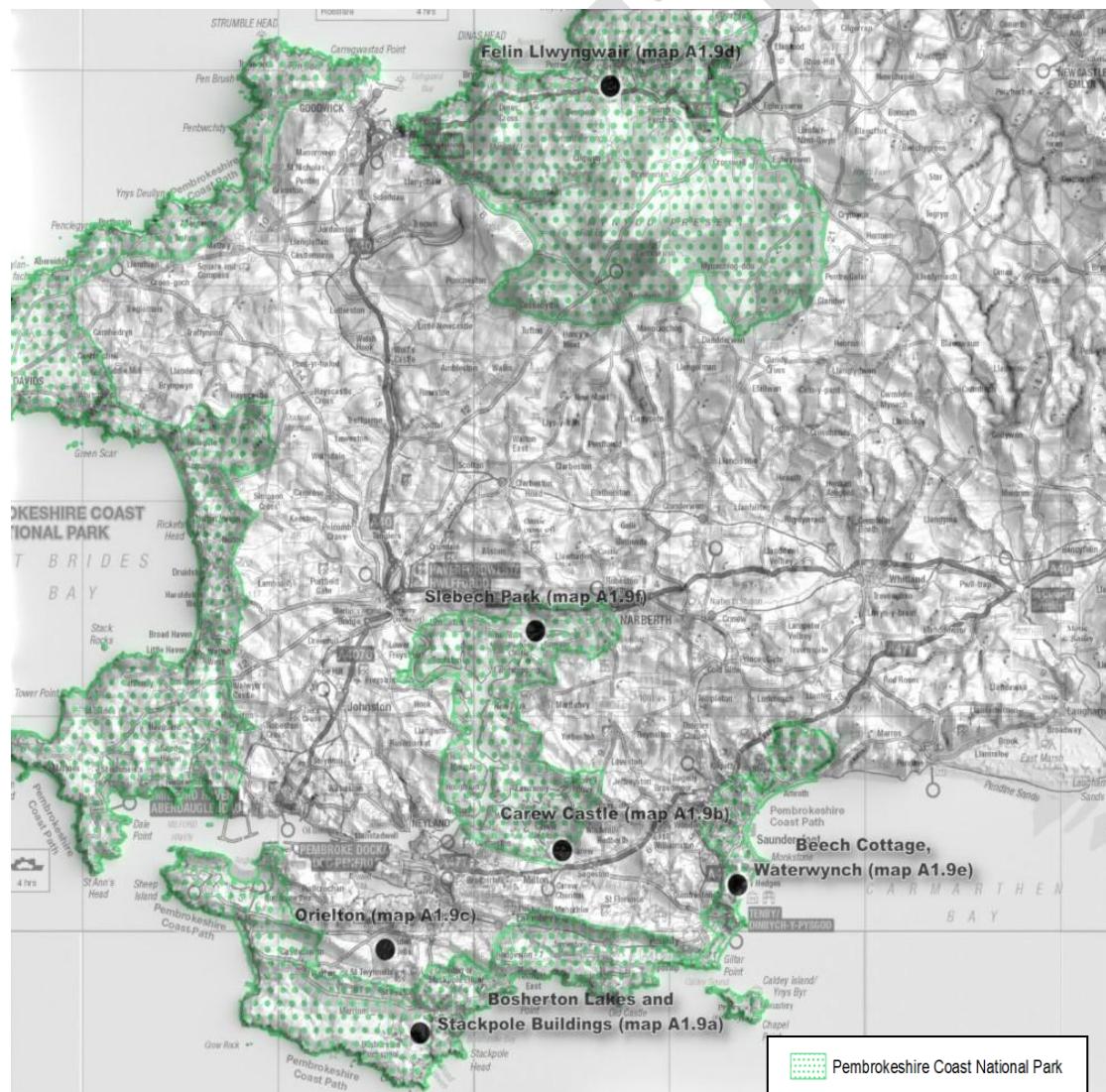
Feature	Condition
4030 European dry heaths	Unfavourable: No-change
7140 Transition mires and quaking bogs	Unfavourable: No-change
4010 Northern Atlantic wet heaths with Erica tetralix	Unfavourable: Recovering
1831 Floating water-plantain <i>Luronium natans</i>	Unfavourable: Un-classified

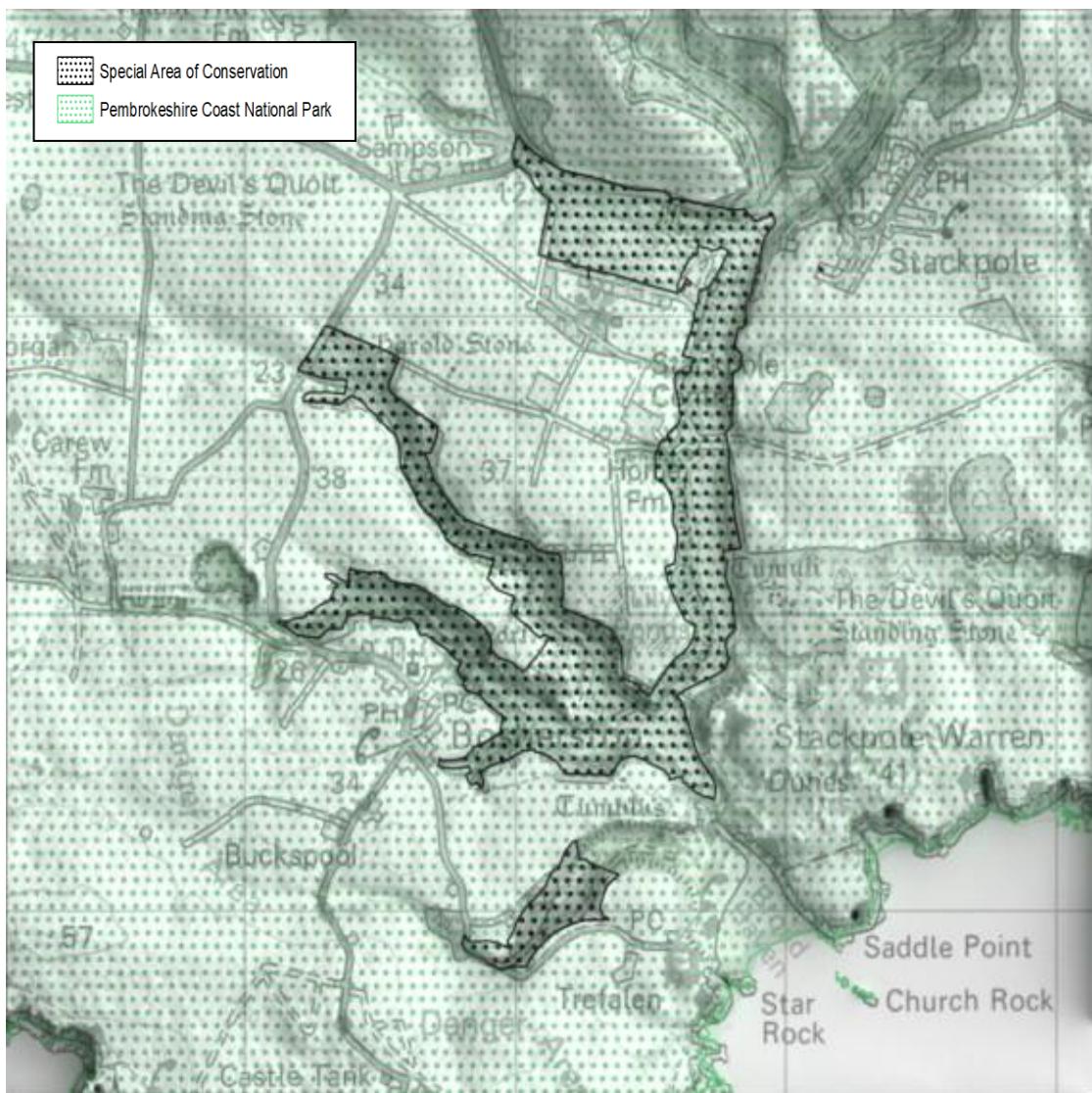
More information: [Joint Nature Conservation Committee: North West Pembrokeshire Commons / Comin Gogledd Orllewin Sir Benfro](#)

UK0014793 Pembrokeshire Bat Sites and Bosherston Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherston General site character

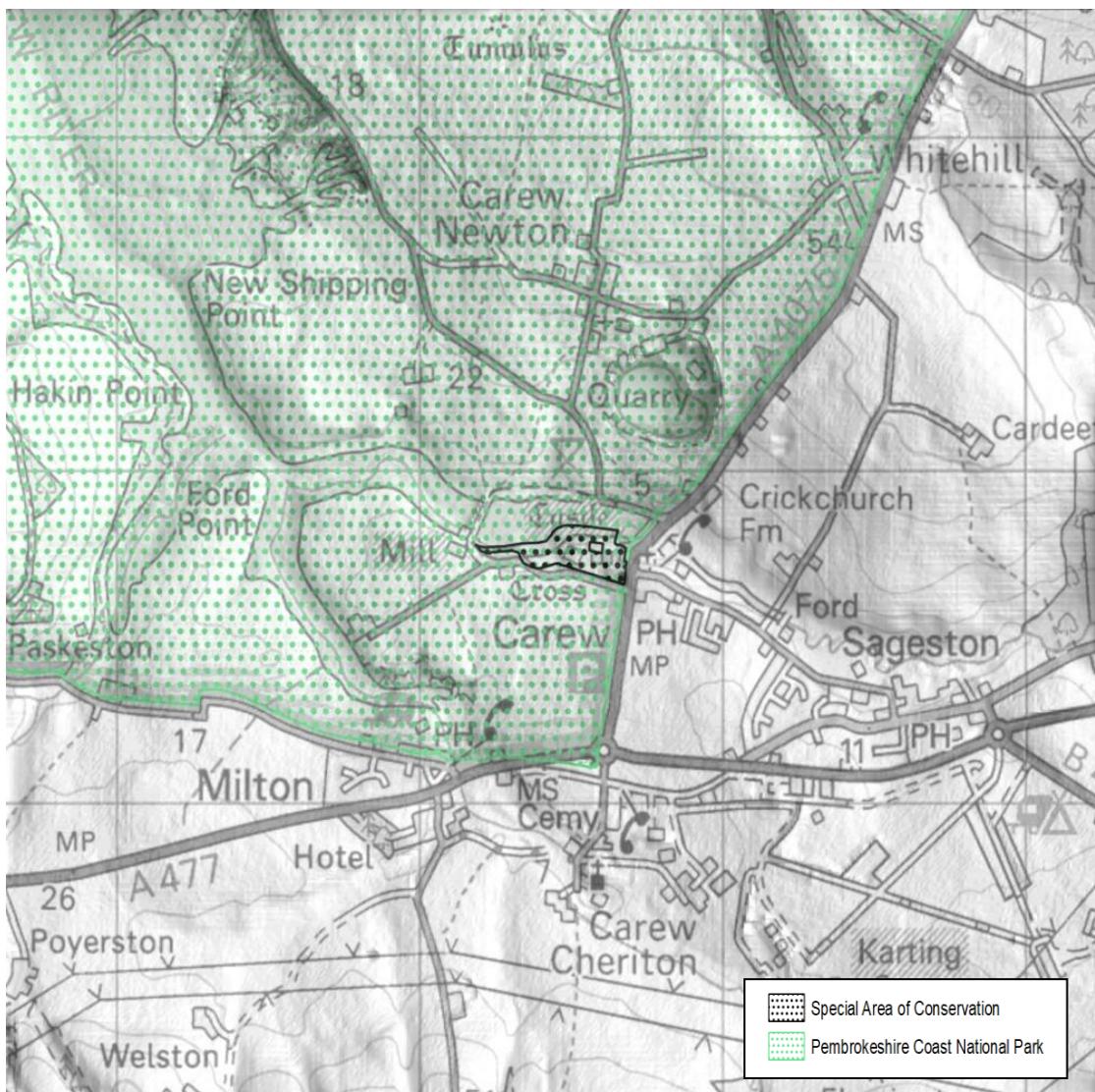
Inland water bodies (standing water, running water) (33%); Bogs. Marshes. Water fringed vegetation. Fens (5%); Heath. Scrub. Maquis and garrigue. Phygrana (13%); Dry grassland. Steppes (3%); Improved grassland (1.8%); Broad-leaved deciduous woodland (29%); Mixed woodland (15%); Other land (including towns, villages, roads, waste places, mines, industrial sites) (0.2%).

This SAC is comprised of a number of separate sites: Bosherston Lakes; Park House Outbuildings, Stackpole; Stackpole Courtyard Flats and Walled Garden; Felin Llwyngwair; Carew Castle; Beech cottage, Waterwynch; Slebech Stable Yard Loft, Cellars and Tunnels; and Orielton (outside the National Park).

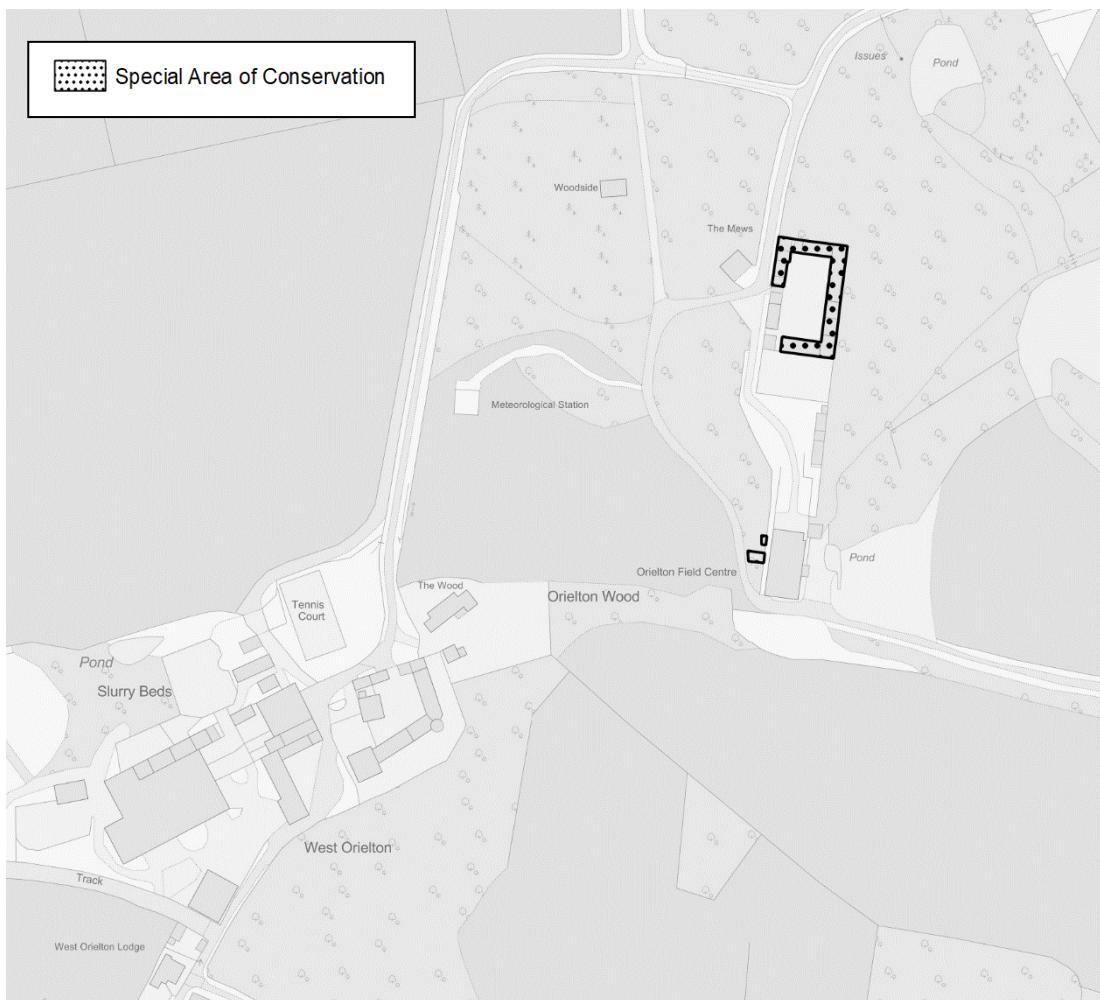




Map A1.9a: Pembrokeshire Bat Sites and Bosherton Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherton SAC



Map A1.9b: Pembrokeshire Bat Sites and Bosherton Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherton SAC

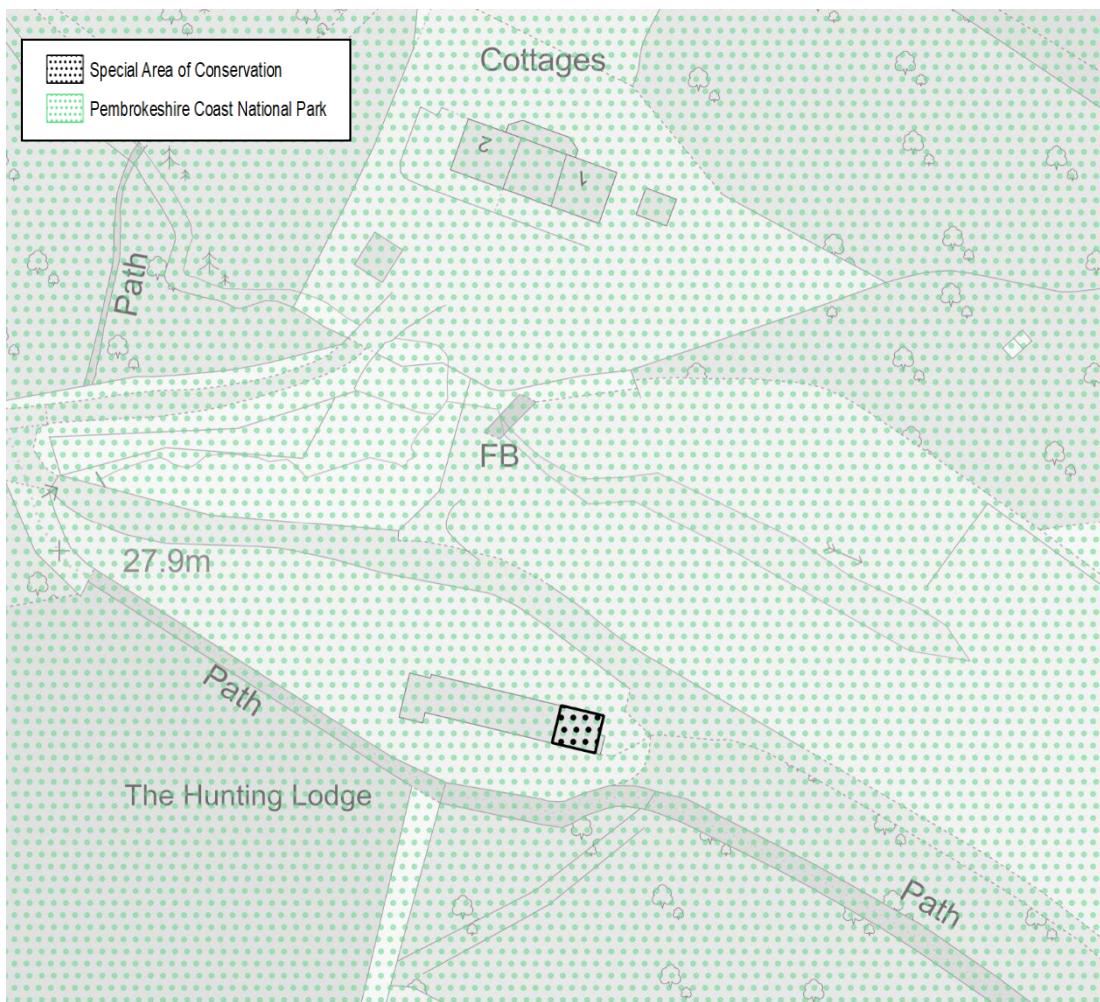


Map A1.9c: Pembrokeshire Bat Sites and Bosherton Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherton SAC





Map A1.9d: Pembrokeshire Bat Sites and Bosherton Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherton SAC



Map 1.9e: Pembrokeshire Bat Sites and Bosherston Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherston SAC



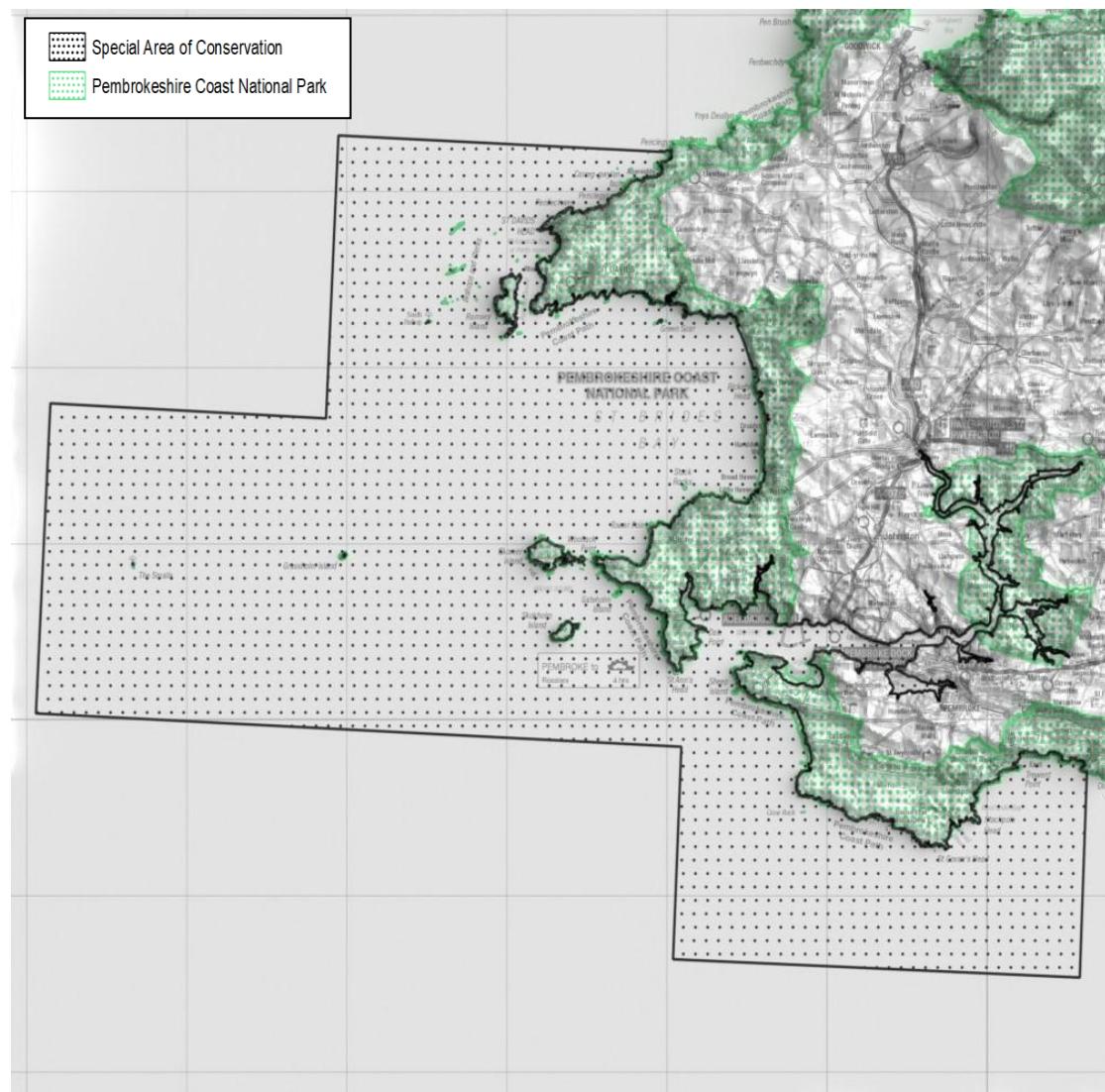
Map 1.9f: Pembrokeshire Bat Sites and Bosherston Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherston SAC

Feature	Condition
3140 Hard oligo-mesotrophic waters with benthic vegetation of <i>Chara spp.</i>	Unfavourable: Declining
1304 Greater horseshoe bat <i>Rhinolophus ferrumequinum</i>	Favourable: Maintained
1303 Lesser horseshoe bat <i>Rhinolophus hipposideros</i>	Unfavourable: Declining
1355 Otter <i>Lutra lutra</i>	Unfavourable: Un-classified

More information: [Joint Nature Conservation Committee: Pembrokeshire Bat Sites and Bosherston Lakes / Safleoedd Ystlum Sir Benfro a Llynnoedd Bosherston](#)

UK0013116 Pembrokeshire Marine / Sir Benfro Forol
General site character

Marine areas. Sea inlets (96%); Tidal rivers. Estuaries. Mud flats. Sand flats. Lagoons (including saltwork basins) (3.8%); Salt marshes. Salt pastures. Salt steppes (0.2%).



Map A1.10 Pembrokeshire Marine/ Sir Benfro Forol SAC

Feature	Condition
1130 Estuaries	Unfavourable
1160 Large shallow inlets and bays	Unfavourable
1170 Reefs	Unfavourable
1110 Sandbanks which are slightly covered by sea water all the time	Favourable
1140 Mudflats and sandflats not covered by seawater at low tide	Unfavourable
1150 Coastal lagoons	Unfavourable
1330 Atlantic salt meadows (<i>Glauco-Puccinellietalia maritimae</i>)	Unfavourable

Feature	Condition
8330 <u>Submerged or partially submerged sea caves</u>	Unknown
1364 <u>Grey seal</u> <i>Halichoerus grypus</i>	Favourable
1441 <u>Shore dock</u> <i>Rumex rupestris</i>	Unfavourable
1095 <u>Sea lamprey</u> <i>Petromyzon marinus</i>	Unfavourable
1099 <u>River lamprey</u> <i>Lampetra fluviatilis</i>	Unfavourable
1102 <u>Allis shad</u> <i>Alosa alosa</i>	Unfavourable
1103 <u>Twaite shad</u> <i>Alosa fallax</i>	Unfavourable
1355 <u>Otter</u> <i>Lutra lutra</i>	Unfavourable

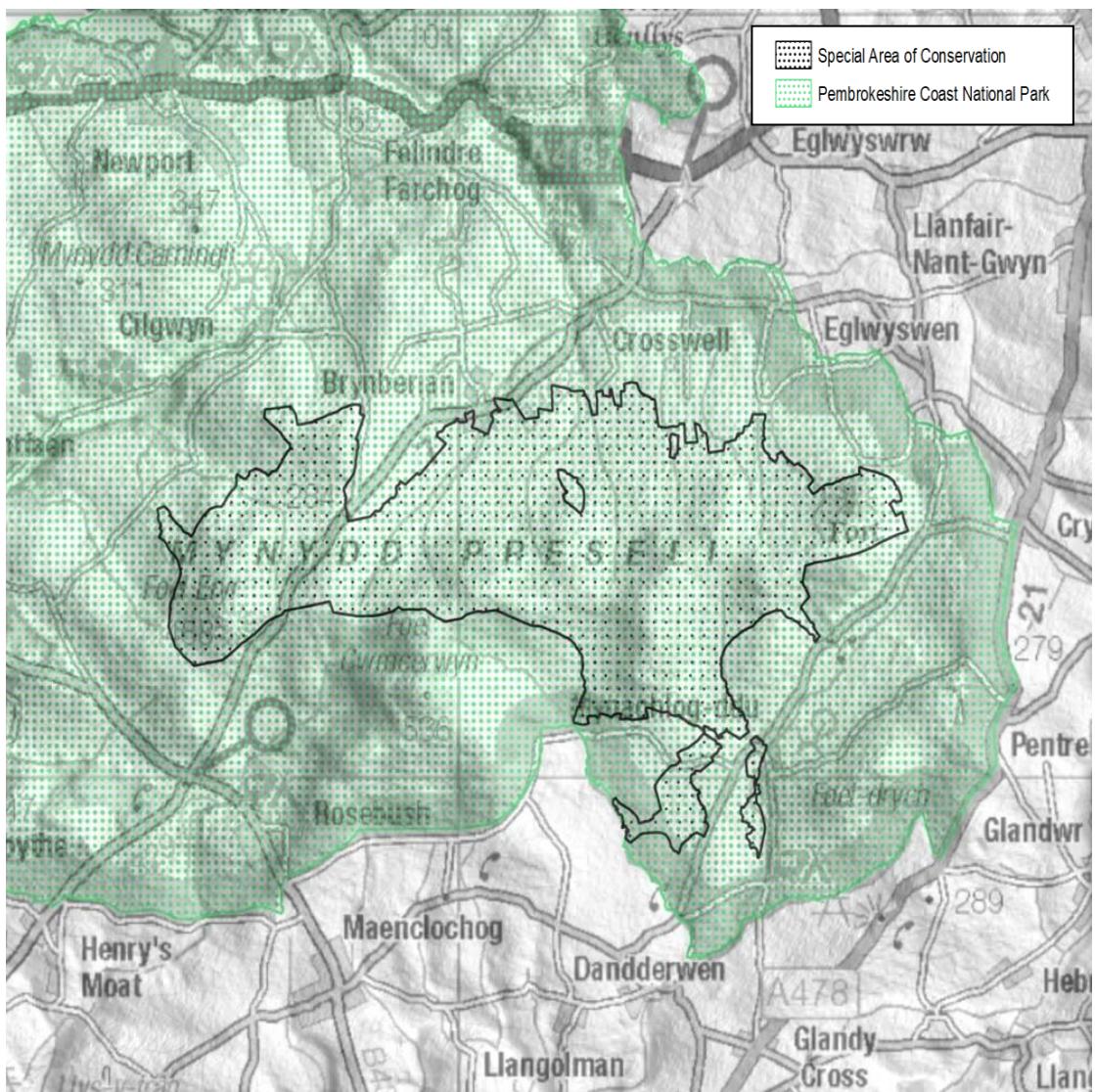
condition and trend information is provisional

More information: [Joint Nature Conservation Committee: Pembrokeshire Marine / Sir Benfro Forol](#)

UK0012598 Preseli

General site character

Bogs. Marshes. Water fringed vegetation. Fens (36%); Heath. Scrub. Maquis and garrigue. Phygrana (31%); Dry grassland. Steppes (32%); Inland rocks. Scree. Sands.



Map A1.11 Preseli SAC

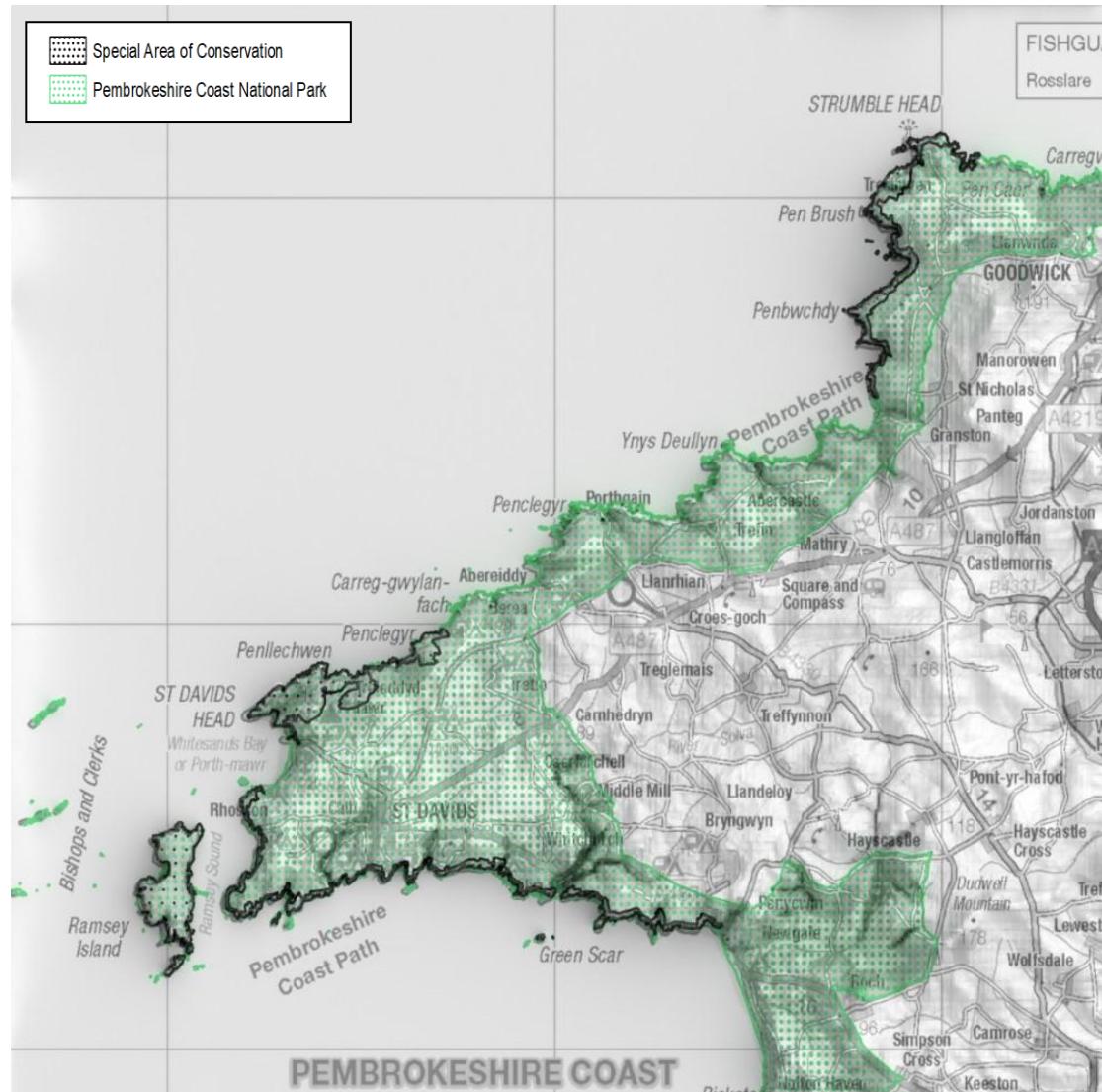
Feature	Condition
4010 Northern Atlantic wet heaths with <i>Erica tetralix</i>	Unfavourable: Un-classified
4030 European dry heaths	Unfavourable: Un-classified
7150 Depressions on peat substrates of the <i>Rhynchosporion</i>	Unfavourable: Declining
7230 Alkaline fens	Favourable: Un-classified
1044 Southern damselfly <i>Coenagrion mercuriale</i>	Unfavourable: Unclassified
1065 Marsh fritillary butterfly <i>Euphydryas (Eurodryas, Hypodryas) aurinia</i>	Unfavourable: Un-classified
1393 Slender green feather-moss <i>Drepanocladus (Hamatocaulis) vernicosus</i>	Favourable: Maintained

More information: [Joint Nature Conservation Committee: Preseli](#)

UK0013045 St David's / Ty Ddewi

General site character

Marine areas. Sea inlets (12%); Coastal sand dunes. Sand beaches. Machair (1%); Shingle. Sea cliffs. Islets (86%); Bogs. Marshes. Water fringed vegetation. Fens (1%).



Map A1.12 St David's / Ty Ddewi SAC

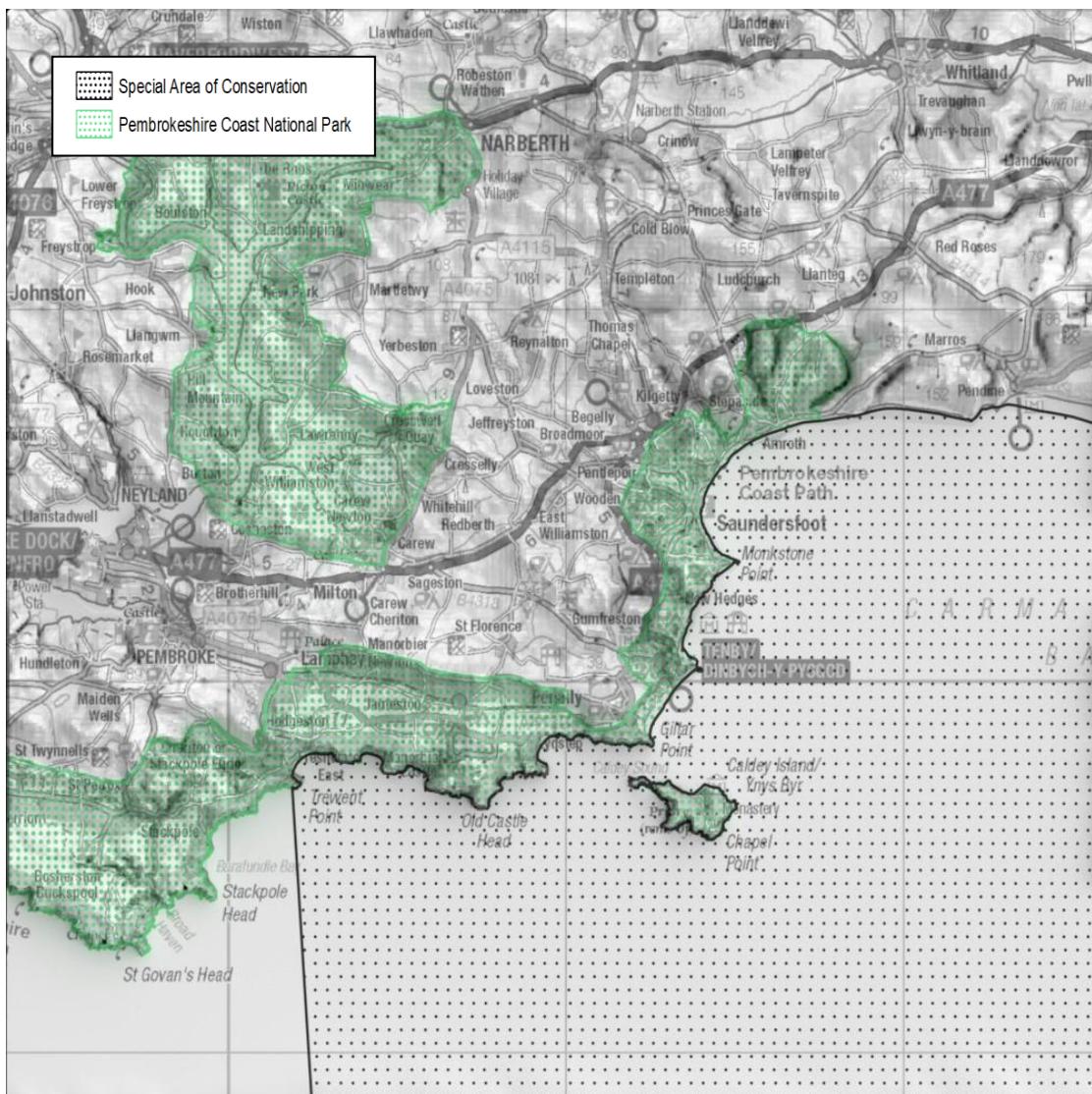
Feature	Condition
1230 Vegetated sea cliffs of the Atlantic and Baltic coasts	Unfavourable: Recovering
4030 European dry heaths	Unfavourable: Recovering
1831 Floating water-plantain <i>Luronium natans</i>	Favourable: Maintained

More information: [Joint Nature Conservation Committee: St David's / Ty Ddewi](#)

General site character

Bogs. Marshes. Water fringed vegetation. Fens (3.7%); Heath. Scrub. Maquis and garrigue. Phygrana (9.1%); Humid grassland. Mesophile grassland (25.7%); Improved grassland (9.6%); Broad-leaved deciduous woodland (51.9%).

DRAFT

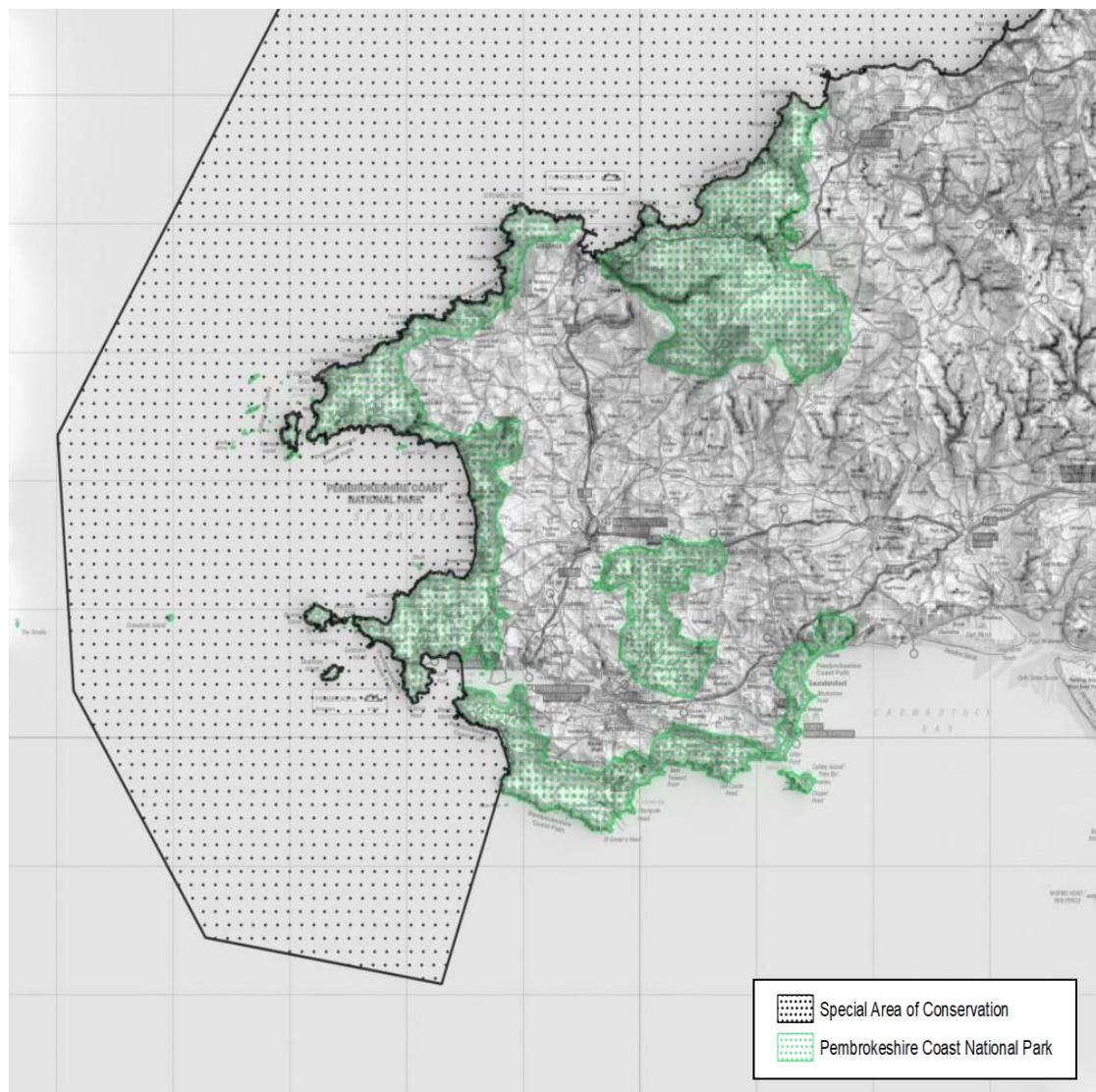


Map A1.13 Bristol Channel Approaches / Dynesfeydd Môr Hafren SAC

Feature	Condition
<u>1315 Harbour porpoise</u>	No data at present

More information:

[Joint Nature Conservation Committee: Bristol Channel Approaches / Dynesfeydd Môr Hafren MPA](#)

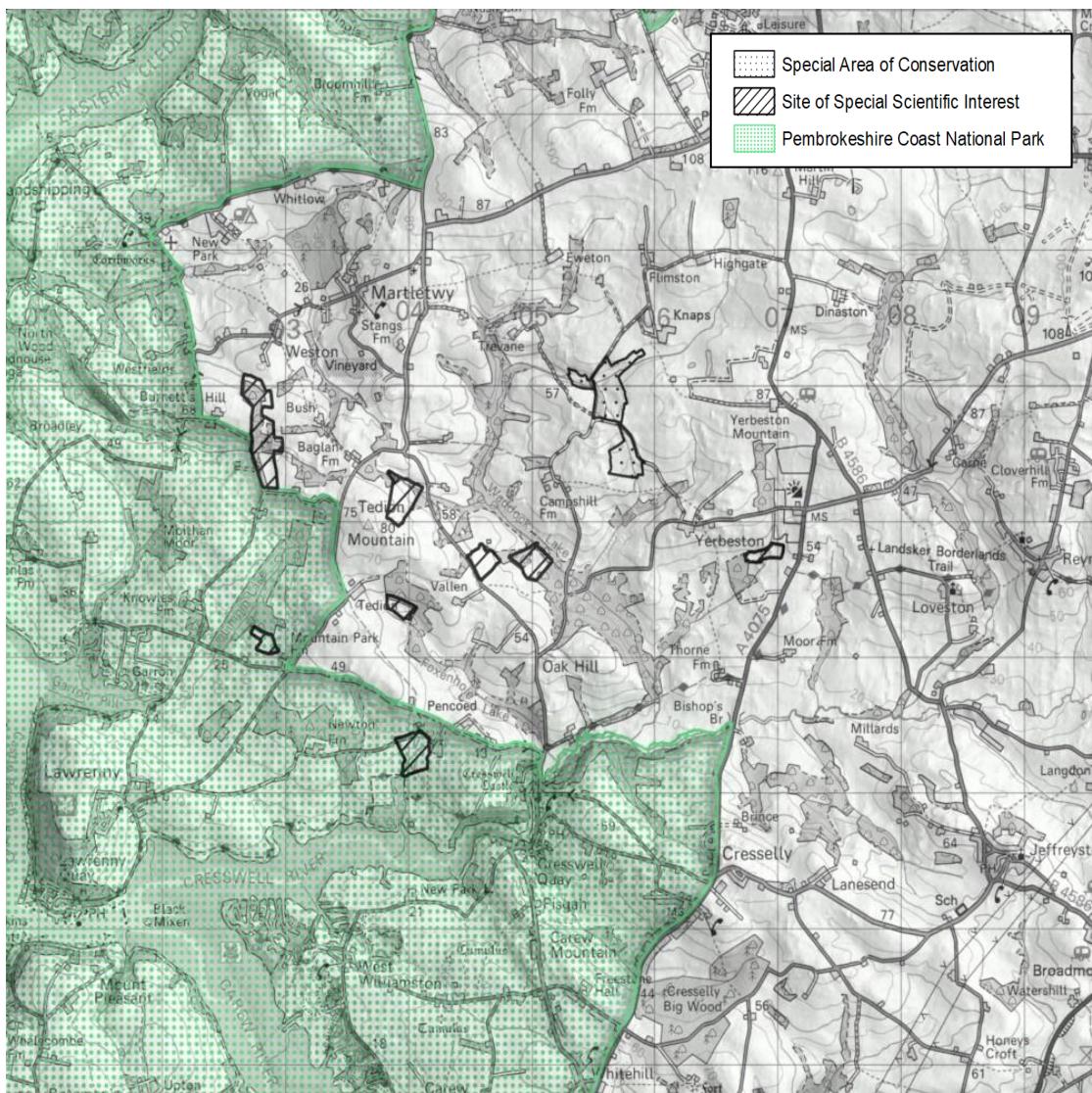


Map A1.14 West Wales Marine / Gorllewin Cymru Forol SAC

Feature	Condition
1315 Harbour porpoise	No data at present

More information:

[Joint Nature Conservation Committee: West Wales Marine / Gorllewin Cymru Forol](#)



Map A1.15 Yerbeston Tops SAC with parts of Rhosydd Yerbeston / Yerbeston Moors SSSI

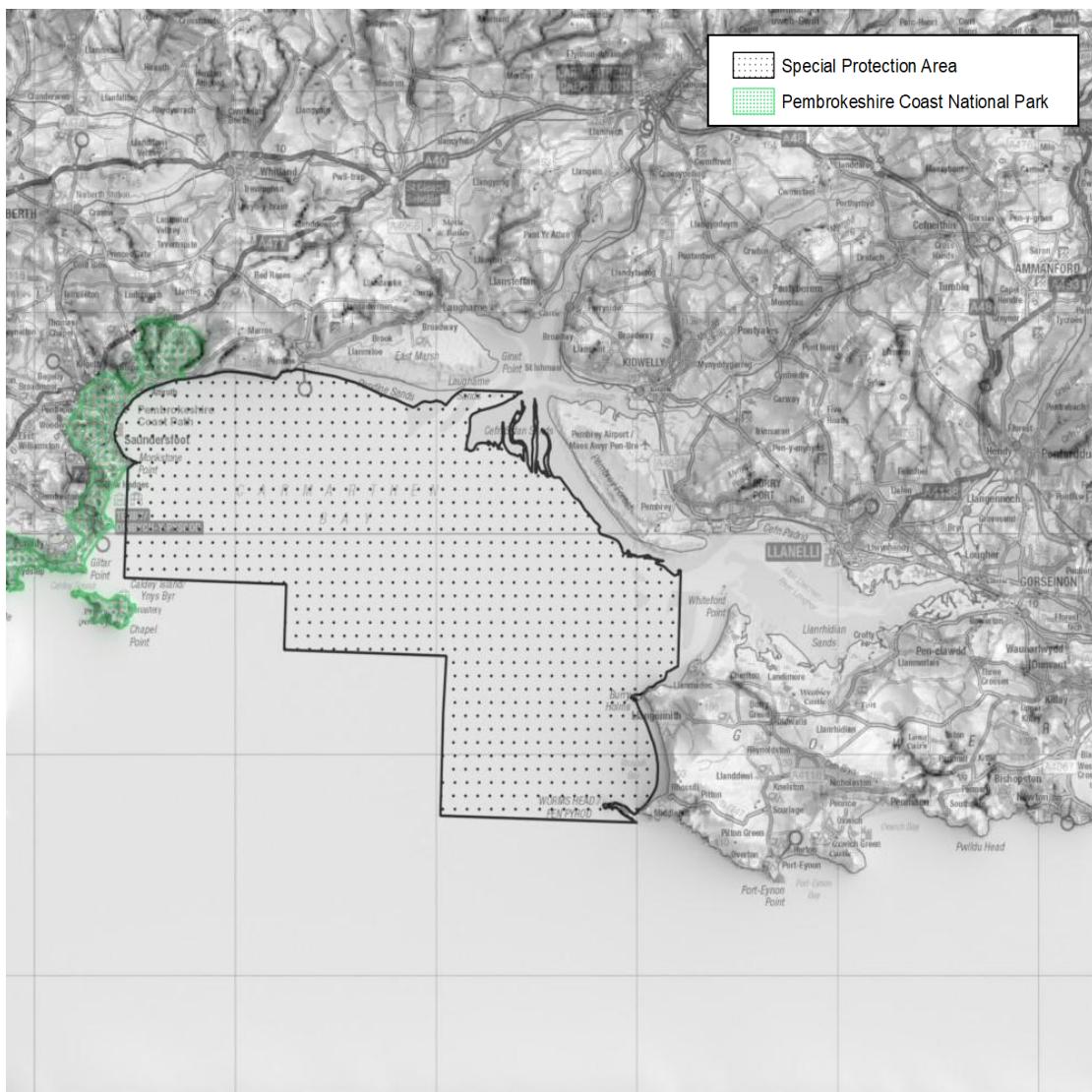
Feature	Condition
<u>6410 Molinia meadows on calcareous, peaty or clayey-silt-laden soils (<i>Molinion caeruleae</i>)</u>	Unfavourable: No-change
<u>1065 Marsh fritillary butterfly, <i>Euphydryas (Eurodryas, Hypodryas) aurinia</i></u>	Unfavourable: No-change

More information: [Joint Nature Conservation Committee: Yerbeston Tops](#)

11.5 Special Protection Areas

UK9014091 Bae Caerfyrddin / Carmarthen Bay
General site character

Marine areas. Sea inlets (100%).



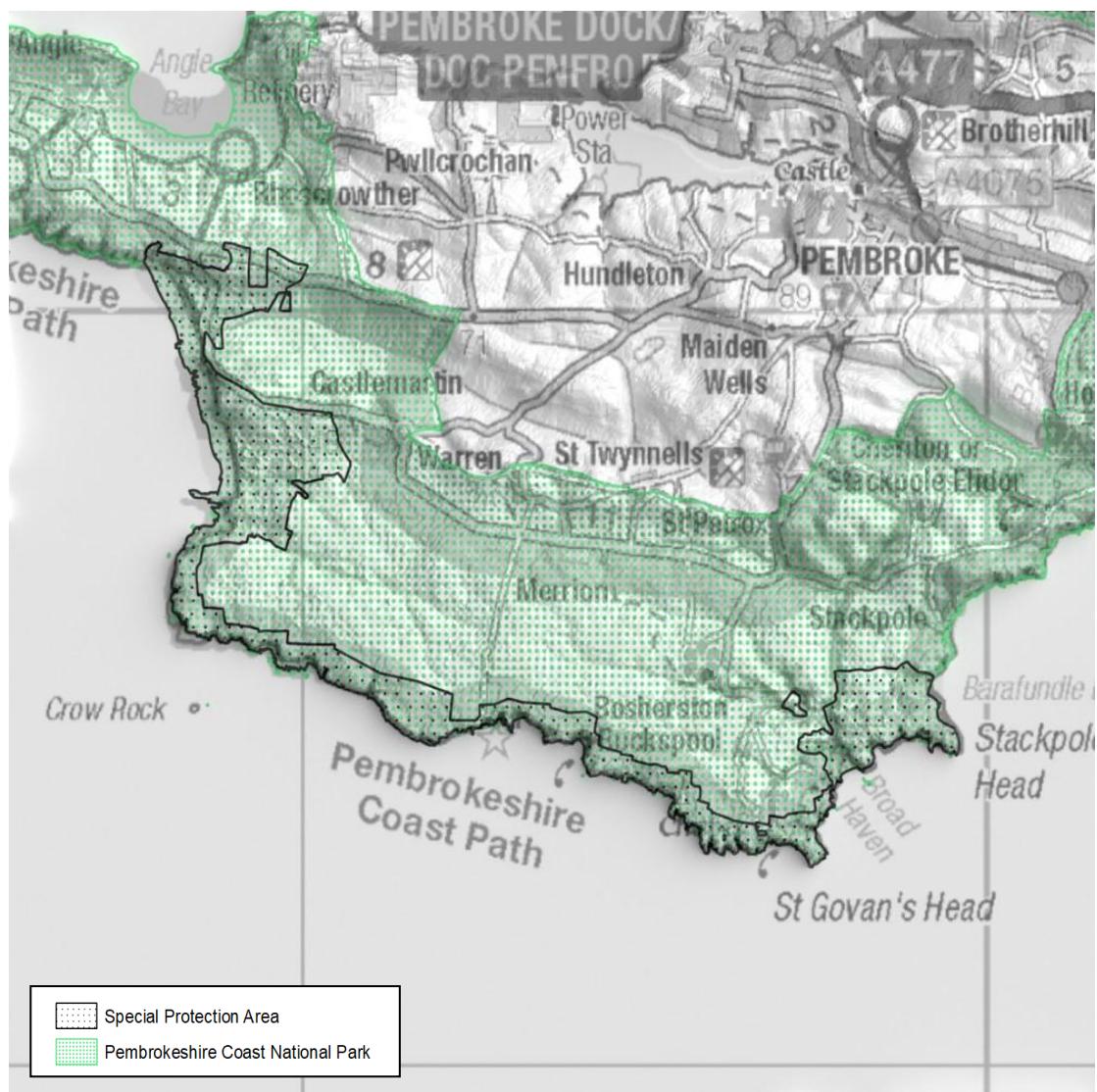
Map A1.16 Bae Caerfyrddin / Carmarthen Bay SPA

Annex 1 bird species	Condition
Common Scoter (<i>Melanitta nigra</i>), over-wintering area (Not available)	

More information: [Bae Caerfyrddin / Carmarthen Bay: Natura 2000 - Standard Data Form](#)

UK9014061 Castlemartin Coast
General site character

Coastal sand dunes. Sand beaches. Machair (56%); Shingle. Sea cliffs. Islets (44%).



Map A1.17 Castlemartin Coast SPA

Annex 1 bird species	Condition
Chough (<i>Pyrrhocorax pyrrhocorax</i>)	Favourable

More information: [Castlemartin Coast: Natura 2000 - Standard Data Form](#);

UK9014041 Grassholm

General site character

Shingle. Sea cliffs. Islets (100%)



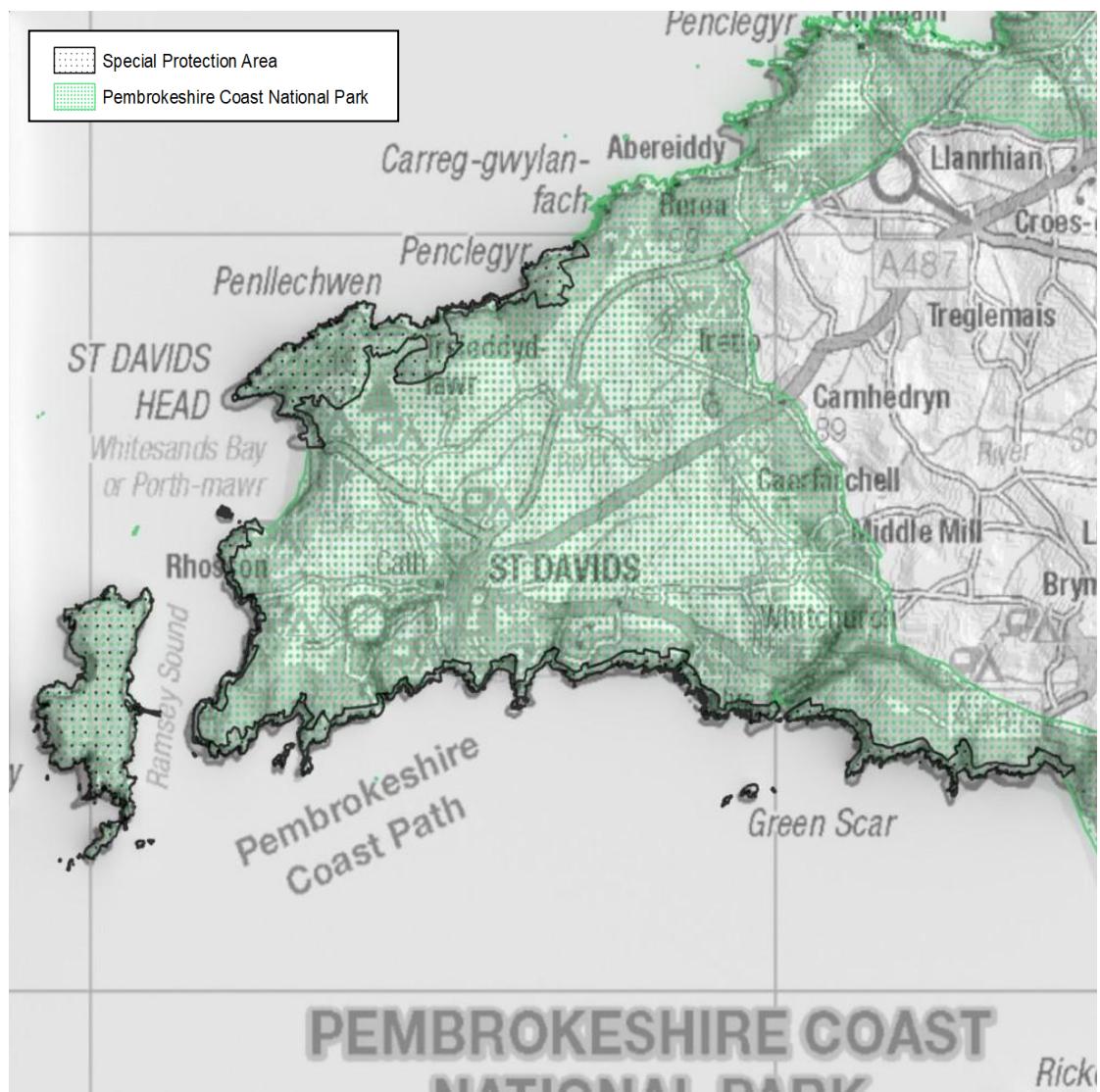
Map A1.18 Grassholm SPA

Annex 1 bird species	Condition
Gannet (<i>Morus bassanus</i>), breeding area	Favourable: Maintained

More information: [Grassholm: Natura 2000 - Standard Data Form](#);

UK9014062 Ramsey and St David's Peninsula Coast
General site character

Marine areas. Sea inlets (11%); Coastal sand dunes. Sand beaches. Machair (1%); Shingle. Sea cliffs. Islets (88%).



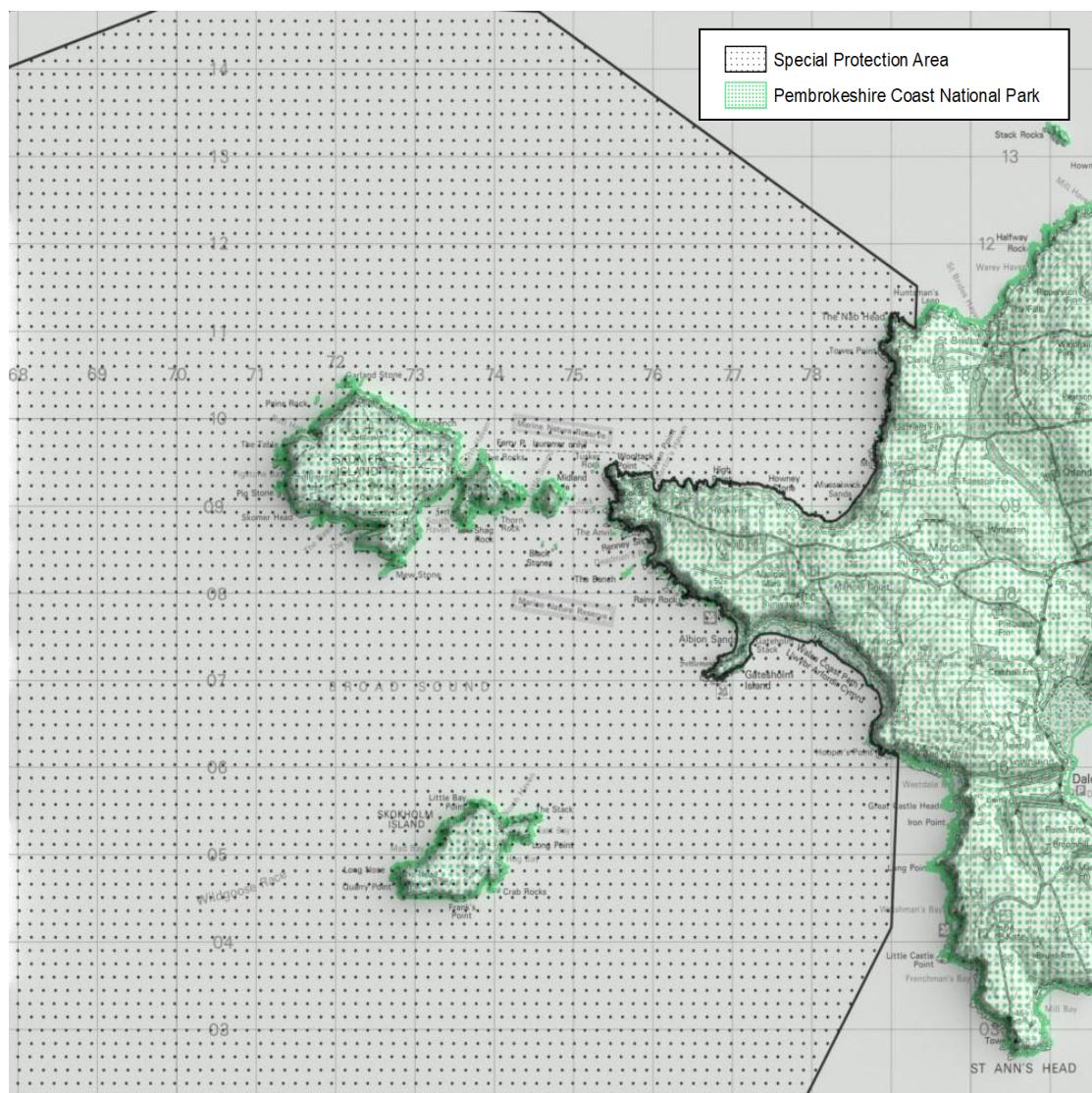
Map A1.19 Ramsey and St David's Peninsula Coast SPA

Annex 1 bird species	Condition
Chough (<i>Pyrrhocorax pyrrhocorax</i>)	Favourable: Un-classified

More information: [Ramsey and St David's Peninsula: Coast Natura 2000 - Standard Data Form](#);

UK9014051 Skokholm and Skomer
General site character

Shingle. Sea cliffs. Islets (100%).



Map A1.20 Skokholm and Skomer SPA

Annex 1 bird species	Condition
Razorbill (<i>Alca torda</i>)	Favourable: Maintained
Atlantic Puffin (<i>Fratercula arctica</i>)	Favourable: Maintained
Storm Petrel (<i>Hydrobates pelagicus</i>)	Unfavourable: Unclassified
Manx Shearwater (<i>Puffinus puffinus</i>)	Favourable: Maintained

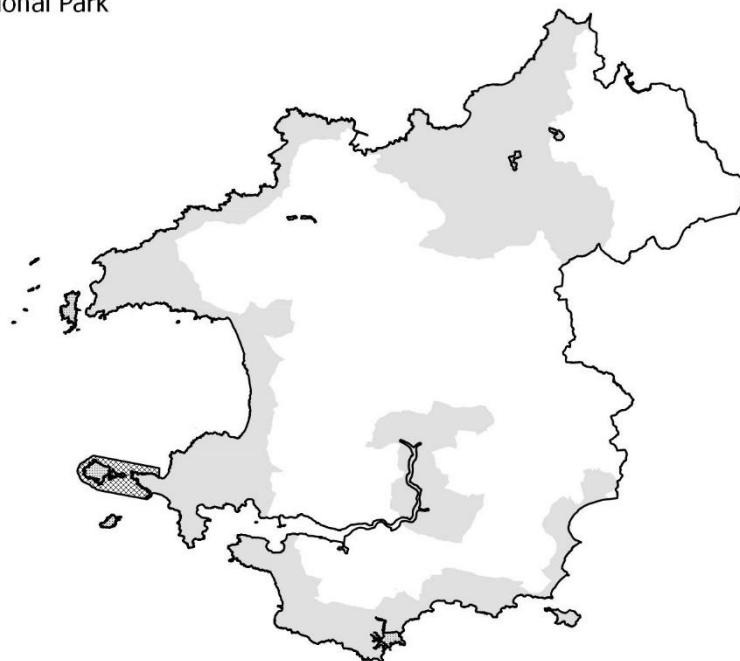
More information: [Skokholm and Skomer: Natura 2000 - Standard Data Form](#);

11.5.1 The following map shows National and Marine Nature reserves in and around the Pembrokeshire Coast National Park.

 Marine Conservation Zone

 National Nature Reserve

 Pembrokeshire Coast National Park



11.5.2 The 2016 State of Wildlife in Pembrokeshire update indicates that 22% of the conservation features in Pembrokeshire are improving; 35% are in a stable condition and 30% are in a state of decline. The remaining 13% are unknown due a lack of data. [The Nature Recovery Plan for Pembrokeshire \(2018\)](#) sets out the Pembrokeshire Nature Partnership's strategy for nature recovery in the county.

Biodiversity Summary

- **Nature Designations in the National Park:**
 - 60 SSSIs
 - 12 SACs
 - 5 SPAs.
- **Only 14% of the SSSIs in the National Park are in favourable condition.**
- **Many SAC features are in unfavourable condition.**

11.6 Geodiversity

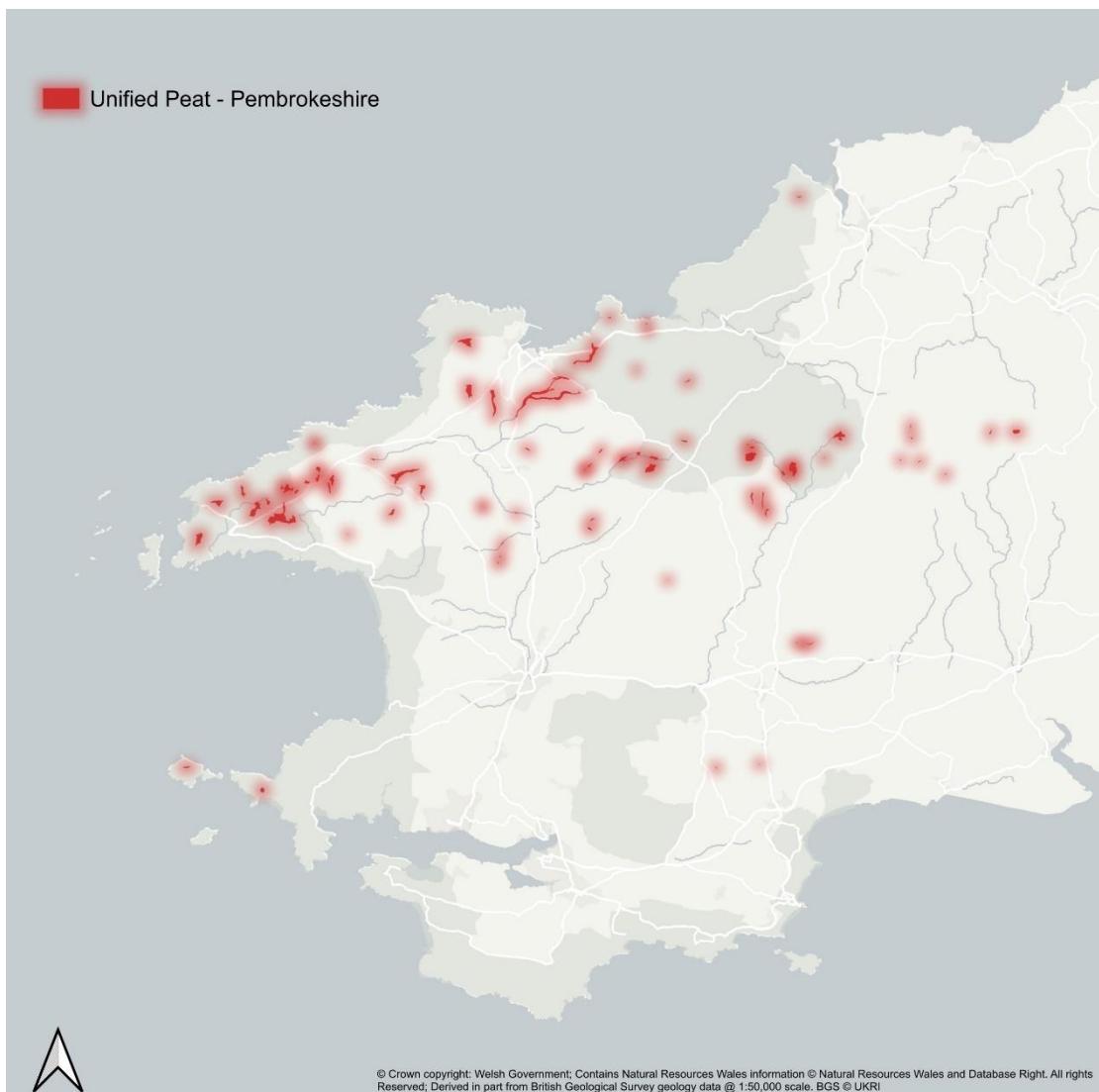
11.6.1 The Pembrokeshire Coast National Park contains more than 50 Geological Conservation Review (GCR) sites, covering about 40% of the Pembrokeshire Coastline (excluding the Milford Haven waterway and Daugleddau). GCR sites are legally protected once they are notified as SSSI. NRW is tasked with monitoring the condition of geological SSSI (note: condition for geological sites is dependent on accessibility, visibility & useability, i.e. on the value of the site for research and education). Please see [Geological Conservation Review \(GCR\) Site Boundaries | DataMapWales](#) for the latest GCR data.”

11.7 Soil

11.7.1 The National Soil Resources Institute (NSRI) at Cranfield University ([Cranfield University](#)) produce a range of soils data for use in Geographic Information Systems. Unfortunately, this data is only available at a cost that is beyond that justifiable for this authority.

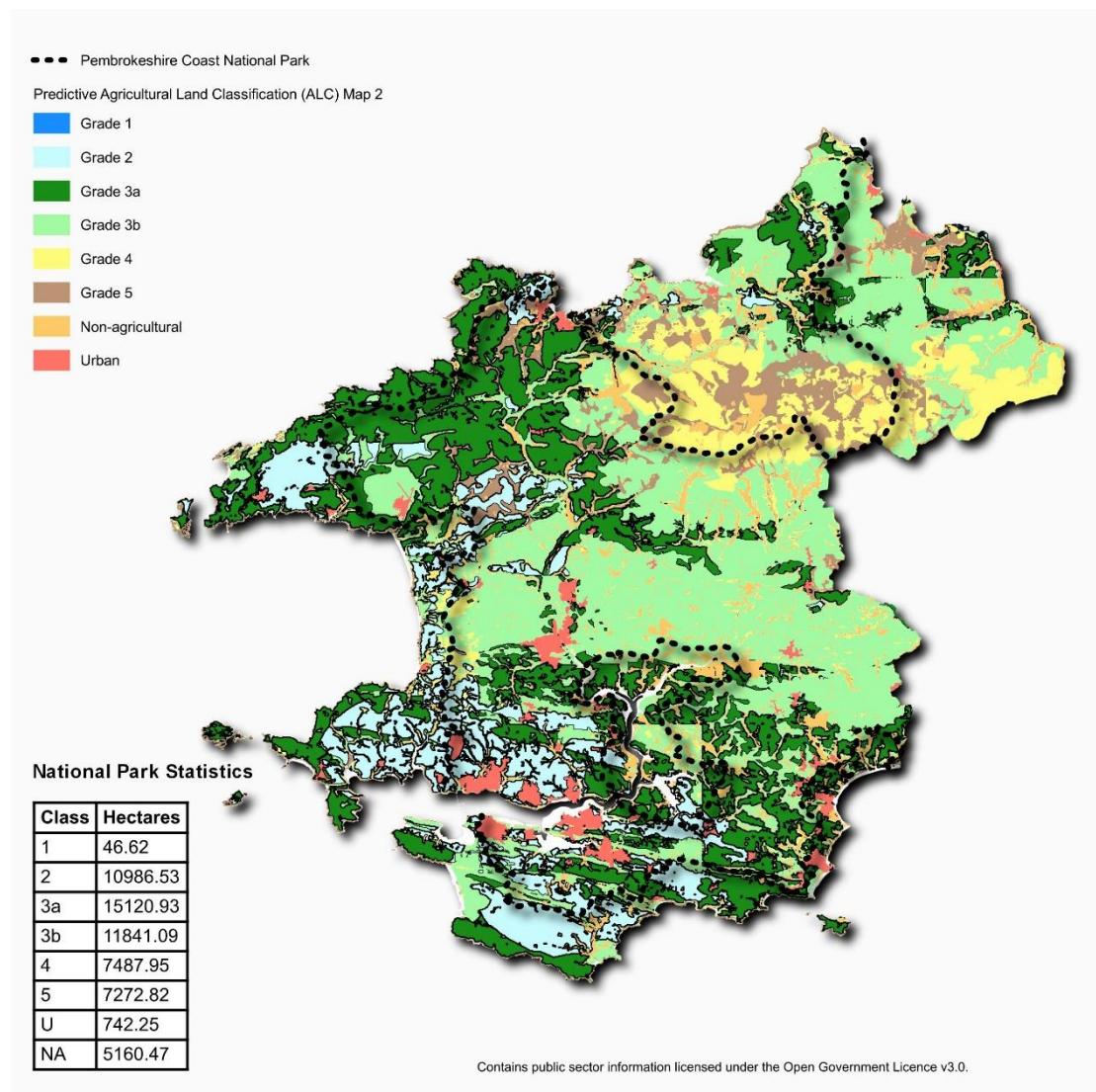
11.8 Peatland

11.8.1 The unified peat map of Wales was produced as part of the Glastir Monitoring and Evaluation Programme in order to provide improved data on the extent and condition of peatland in Wales. The map below is a subset of the unified peat map of Wales for Pembrokeshire, with figures for the estimate extents of peat in the National Park.



	Area (Hectares)	Proportion (%)
Pembrokeshire	727.23	0.44%
Pembrokeshire Coast National Park	384.727	0.63%

11.8.2 The Predictive Agricultural Land Classification (ALC) Map 2 by Welsh Government provides indicative data as to where in Wales the Best and Most Versatile (BMV) Agricultural land can be found. BMV is defined as agricultural land classes 1, 2 and 3a. The map below shows the Predictive ALC 2 map data for Pembrokeshire and provides statistics for the National for each agricultural land classification.



Data source: [Predictive Agricultural Land Classification \(ALC\) Map 2 | DataMapWales \(gov.wales\)](#)

11.8.3 BMV makes up approximately 45% (44.59%) of the land in the National Park, with over a quarter (25.78%) of the land being classified as 3a; 18.73% as 2 and 0.08% as 1.

11.8.4 The proportion of BMV in the National Park is significantly higher than it is for Wales as a whole for classes 2 and 3a.

Class	PCNP (%)	Wales (%)
1	0.08	0.25
2	18.73	6.38
3a	25.78	9.58

Soils Summary

- Peatland only covers a small area (0.63%) of the National Park.
- Best and Most Versatile (BMV) land makes up 44.6% of the National Park, the majority of this being class 3a agricultural land.

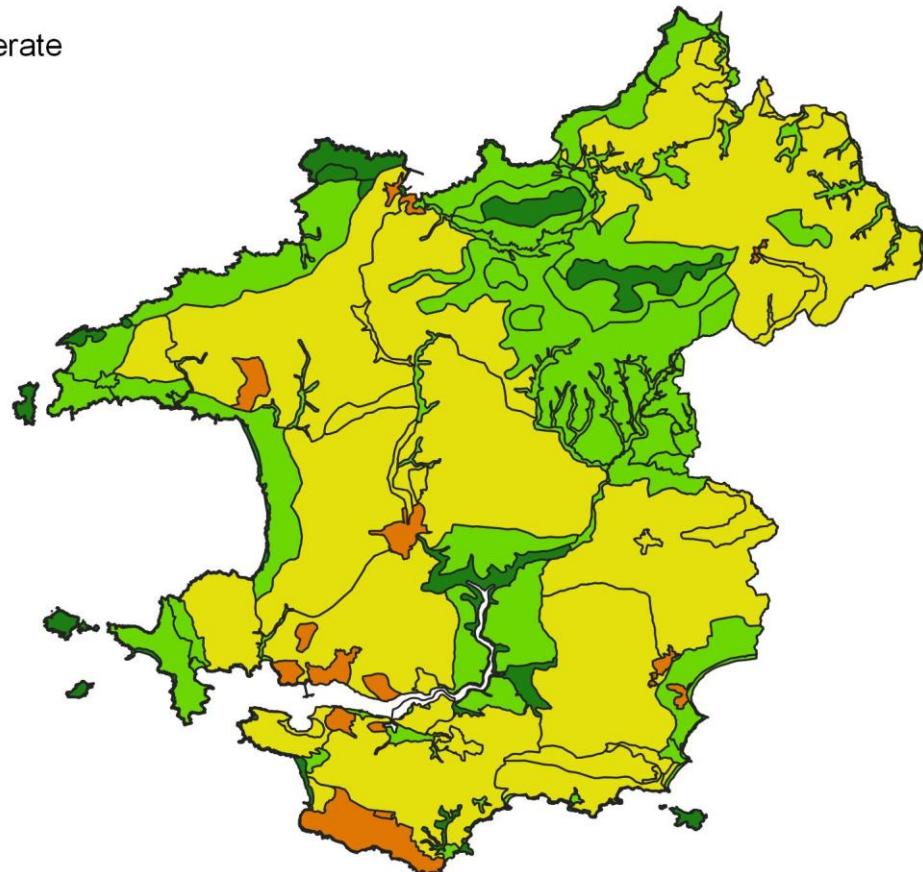
DRAFT

12 Landscape

12.1.1 LANDMAP is the national information system, devised by the Natural Resources Wales, for taking landscape into account in decision-making. LANDMAP characterises the landscape according to five aspects: Geological landscape; Landscape Habitats; Visual & Sensory; Historic Landscape; and Cultural Landscape. The Visual and Sensory and Landscape Habitats aspects have been Quality Assured for Pembrokeshire. The Visual and Sensory aspect is mapped below according to the assessed overall landscape value and the presence of detracting views.

LandMap Visual Sensory (Evaluation)

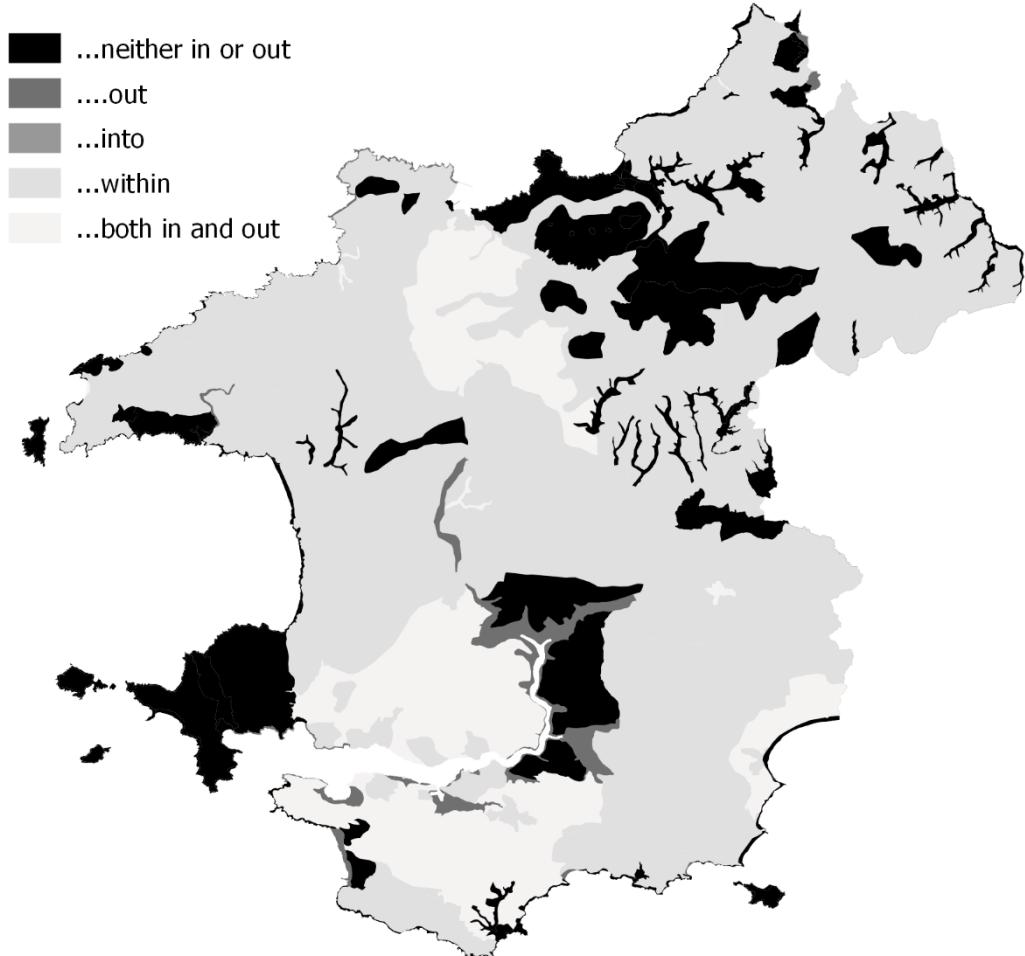
- █ Outstanding
- █ High
- █ Moderate
- █ Low



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Datasource: Natural Resources Wales

Detracting views



Datasource: Natural Resources Wales

The Pembrokeshire Coast NPA has commissioned an integrated landscape characterisation based on the LandMap aspects; this has been published as a Background Paper to the Local Development Plan.

Landscape Summary

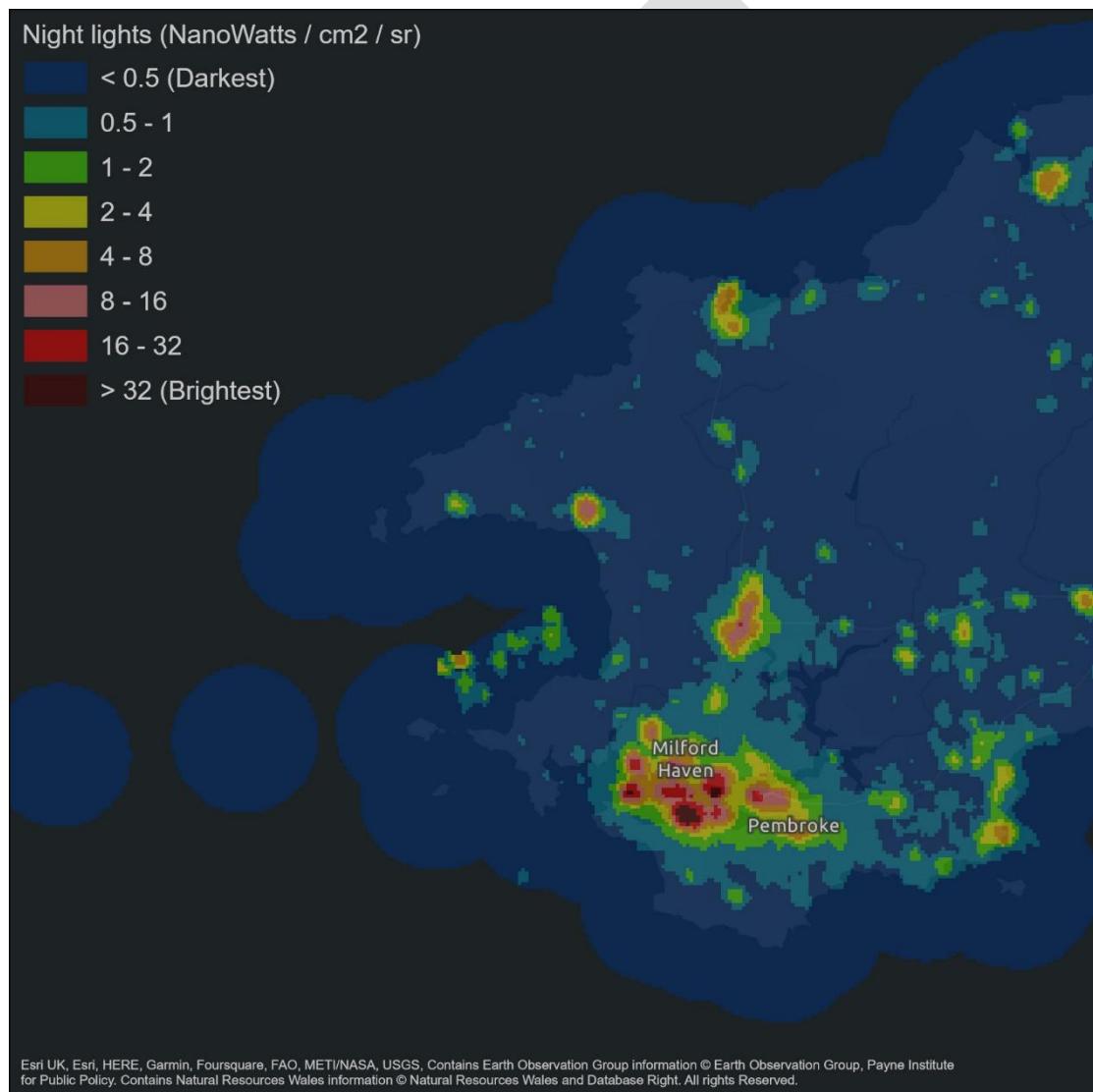
- The Preseli Hills and coastal areas are generally rated highly for scenic quality and tranquillity.
- Areas with detracting views are typically associated with larger settlements, infrastructure, or industrial activity.

13 Tranquility/ Disturbance

13.1.1 Major components of disturbance in rural areas are light and noise pollution.

13.1.2 Light Pollution:

Whilst there is no mapping available that shows light pollution over time accurately, a good baseline is the VIIRS Satellite data, the map below was produced by Natural Resources Wales as part of their tranquility and place work¹³.

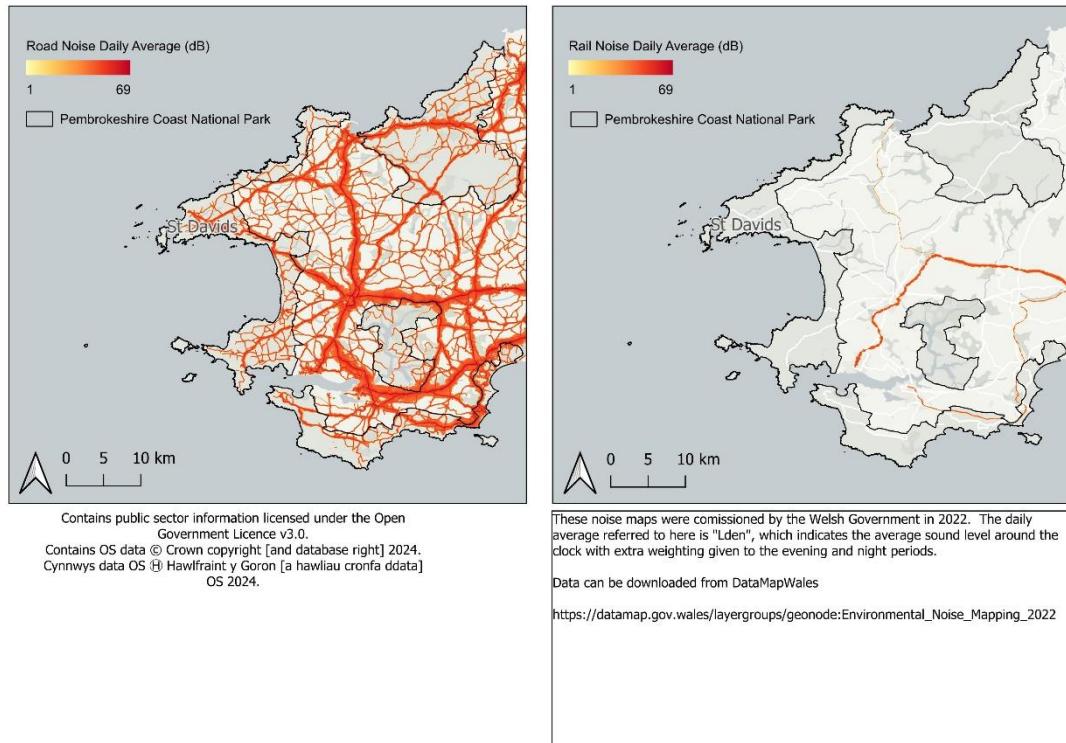


13.1.3 The major sources of light pollution within the National Park are the larger settlements. Some more localised sources include intensive agriculture and installations that sit outside of but close the National Park.

¹³ [Tranquillity and Place: Visually Tranquil Areas \(naturalresources.wales\)](http://naturalresources.wales).

The uplands (Preseli Hills) are largely undeveloped and represent the darkest parts of the National Park.

Noise:



13.1.4 Other indicators of disturbance might be the presence and nature of roads, population density and tourism activity (see the table on tourism 'hot-spots' in the recreation section of this appendix).

Tranquillity/ Disturbance

- The major sources of light pollution in the National Park are larger settlements, intensive agriculture, and installations near the park boundary e.g. oil refineries.
- Noise pollution is concentrated around transport corridors and urban centres.

14 Waste

14.1.1 The table below provides a summary of the management of municipal waste in Pembrokeshire.

Management	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Total Municipal Waste Collected/Generated	71044.55	66157.53	57727.02	64590.3	60443.52	62471.82
Total Waste Reused/Recycled/Composted (Statutory Target)	44021.13	47403.01	42267.28	47307.1	43304.7	44982.21
Waste sent for other recovery	0	20.97	0	0	0	0
Waste Incinerated with Energy Recovery	13801.58	13491.41	11184.93	13077.76	13247.63	15956.14
Waste Incinerated without Energy Recovery	0	0	0	27.85	26.2	0
Waste Landfilled	13040.67	5053.8	3669.61	4275.09	3289.86	1391.80
Percentage of Waste Reused/Recycled/Composted (Statutory Target)*	61.96	71.65	73.22	73.24	71.64	72.0

Source: [Stats Wales](#)

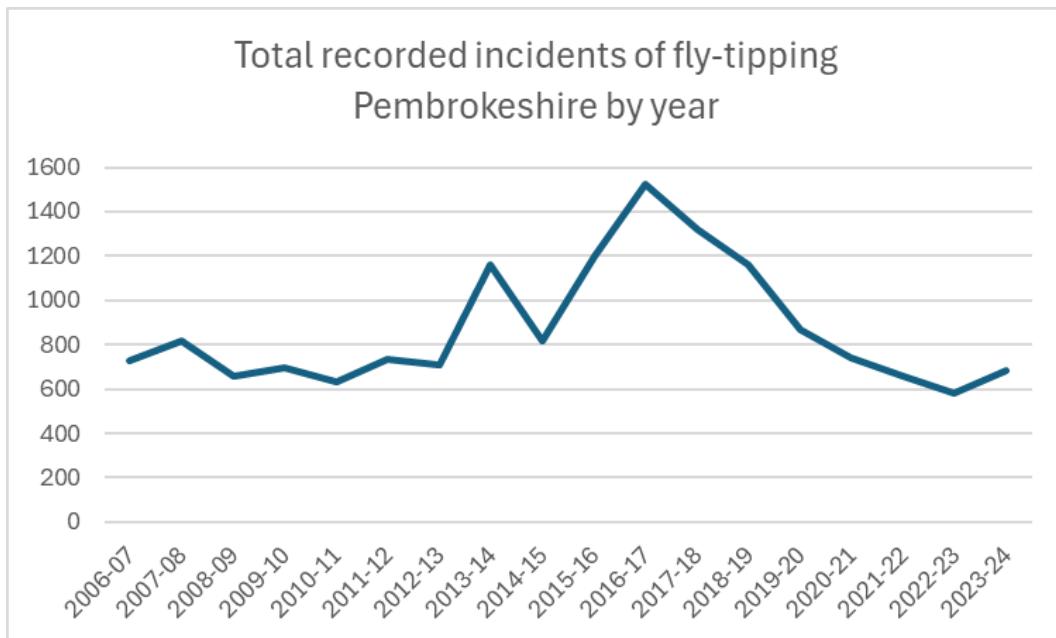
*Total waste reused/recycled/composted (as defined by the Statutory Local Authority Recovery Target, LART), as a percentage of total municipal waste collected/generated

14.2 Litter

14.2.1 As litter (including beach litter) appears to be a significant problem in the National Park, detailed information on the extent and sources of litter are needed. Attempts will be made to source such information as the Sustainability Appraisal progresses.

14.3 Fly-tipping

14.3.1 Annual fly-tipping data is available for Pembrokeshire from the Welsh Government via the StatsWales website.



Recorded fly-tipping incidents by Local Authority. Source: [StatsWales](#)

14.3.2 After spiking significantly between 2014-15 and 2016-17, the frequency of fly tipping in Pembrokeshire has declined rapidly to its lowest point in temporal coverage of the dataset in 2022-23. 2023-24 shows a small increase.

Waste Summary

- The proportion of waste reused, recycled or composted in Pembrokeshire has consistently above the statutory target.
- The amount of waste sent to landfill in Pembrokeshire has reduced dramatically between 2018 and 2024.
- After peaking in 2014, fly tipping incidents in Pembrokeshire have declined significantly.

15 Minerals

15.1.1 As of April 2024, there are five active quarry sites in the National Park

Site Name	Mineral type	Reserve (at date)	Comments
Carew Quarry	Limestone	3.7Mt (2012)	Active - permission expires 2042, allowed up to 150,000 tonnes pa.
Rhyndaston	Igneous	1.65Mt (2002)	Active - permission expires December 31 st 2026.
Syke	Igneous	2.2Mt (1998)	Works intermittently. Inactive since 2009. Permission expires February 2042.
Pantgwyn	Sand and gravel	1.1 Mt (2008)	Permission expires March 16 th 2031. 80,000 tonnes pa.
Trefiggin	Sand and gravel	1.445 Mt (2006)	Permission expires March 16 th 2040. 80,000 tonnes pa.

15.1.2 One dormant quarry site is identified at Penberry with reserves of granite in excess of 112,000t. A Prohibition Order has been made and submitted to Welsh Government for confirmation.