

Briefing Note on the 2022- Based Local Authority Population and Household Projection

Council Response

1.1 This briefing note has been prepared in light of the request by the Inspectors to consider the implications of the most recently published Welsh Government's 2022- based Population and Household projections on the Revised Local Development Plan 2018-2033. The 2022 based projections supersedes the previous 2018 based projections.

1.2 Within this briefing note, consideration is given to the accompanying report produced by Edge Analytics which provides a full detailed response to the Inspectors' request.

1.3 The Welsh Government's 2022-based projections provide statistics on the future potential size and structure of the population, as well as the number and type of households that might form between 2022 and 2047.

1.4 As in previous rounds of projections, a central or 'principal' scenario has been produced by Welsh Government, together with a range of population projections variants. Headline population and household projection outcomes were published in November 2025; since then, a range of data detail has been published, although as of January 2026, the full range of scenario evidence is currently unavailable for all variants. The focus of the report is therefore the 2022 based Principal Projection.

2. Comparing with the Revised LDP's growth scenario

Population

2.1 The population growth trajectories for the *PG-10Y (2019)* scenario and the apportioned 2022-based WG projections are compared below, with the latest MYE evidence included for context.

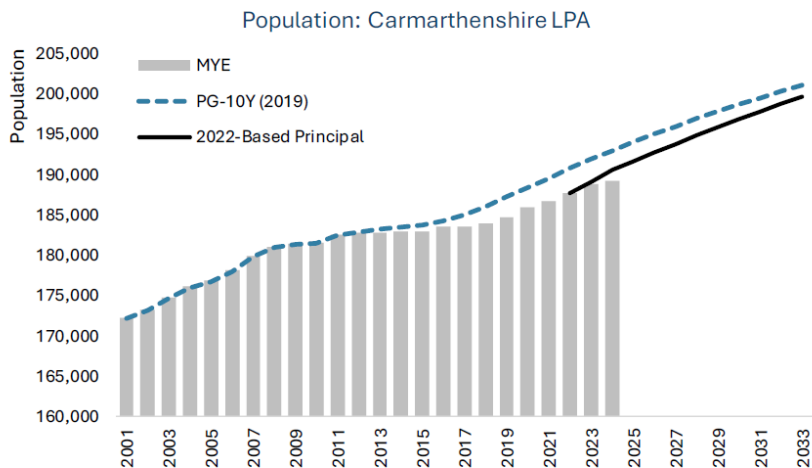


Figure 6: Preferred demographic scenario and WG 2022-based *Principal* projection

Source: ONS, WG, Edge Analytics

2.2 Despite the *PG-10Y (2019)* scenario resulting in an overall larger population in each year of the projection (reflective of the larger MYE base year population at the time), the growth rate over the 2018–2033 plan period is broadly aligned with that of the 2022-based *Principal* projection. The *PG-10Y (2019)* scenario resulted in population growth of 8.1%, compared to 8.5% under the 2022-based *Principal* projection (apportioned and extended back to 2018 by Edge Analytics).

3. Household Change

Table 3: Preferred demographic scenario and WG 2022-based *Principal* projection

Scenario or WG Projection	Change 2018–2033				Average per year	
	Population Change	Population Change %	Household Change	Household Change %	Net Migration	Natural Change
2022-Based <i>Principal</i> *	+15,707	8.5%	8,599	10.8%	1,964	-917
PG-10Y (2019)	+15,115	8.1%	8,538	10.6%	1,337	-329

* Estimates include the 2018–2021 ONS MYE and WG household estimates. Note that UPC has been included by Edge Analytics within the apportioned MYE history in the 2022-based *Principal* scenario in this table for comparability with the PG-10Y (2019) scenario.

3.1 The slightly higher population growth outcome of the 2022-based *Principal* projection is a result of the historical MYE period from which the projections have been formulated.

3.2 Net migration (the combined impact of internal and international migration) is higher (1,964 per year) under the 2022-based *Principal* projection, compared to 1,337 per year under the PG-10Y (2019) scenario. This is a result of the higher level of net internal (domestic) migration in Carmarthenshire in the years preceding 2018; this is carried forward in the 2022-based *Principal* projection. The PG-10Y (2019) scenario was underpinned by the pre-Census (i.e. non-rebased) MYE, from which more muted internal migration assumptions were derived.

3.3 The recent and projected continued decreases in fertility result in the 2022-based *Principal* projection seeing a greater loss of population through negative natural change compared to the PG-10Y (2019) scenario (-917 per year compared to -329 per year).

3.4 However, the overall impact of the migration and natural change differences is similar in terms of total population growth between 2018 and 2033: both scenarios result in population growth averaging just over 1,000 people per year.

3.5 Despite the different underpinning household assumptions (the *PG-10Y (2019)* scenario utilised household membership rate assumptions from the earlier 2014-based Welsh Government projections), the level of household growth is also similar to that in the 2022 projections, at just under 11% across the plan period (see Table 3). Without the household detail behind the 2022-based projections, it is not possible to compare the household composition implied by these two projections.

4. Age Profiles

4.1 A further comparison is the resulting age profile changes under each scenario, as illustrated below in Figure 7. Both scenarios see overall comparable growth in the 60+ age groups, equivalent to an additional +16,000 people between 2018 and 2033, although growth is more evenly distributed across the older age groups in the 2022-based *Principal* projection; in the *PG-10Y (2019)* scenario, growth was more heavily weighted towards the oldest 85+ age group. Reflecting the lower fertility assumptions, the 2022-based projection sees population *decline* in the youngest age groups. In the 2022-based *Principal* projection, population growth is more positive in the working age groups.

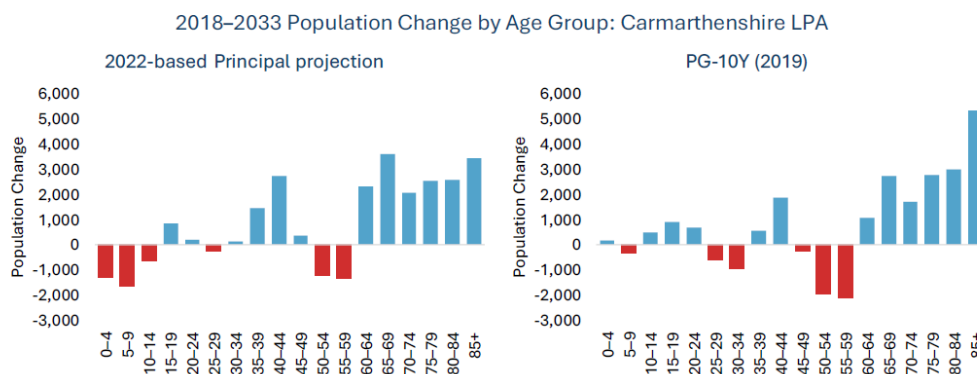


Figure 7: Preferred demographic scenario and WG 2022-based *Principal* projection: population change by age group

Source: ONS, WG, Edge Analytics

5. Conclusion

5.1 In considering the principal projection of the 2022 based projection against the Council's preferred scenario, the results identify similar levels of population and household growth.

5.2 This is despite several significant changes to the historical demographic evidence that underpins the projections. This is coupled with changes to the patterns of both internal and international migration seen in recent years, and a continued decline in fertility rates, the net migration and natural change outcomes of the two scenarios are different. The more positive impact of net internal migration in Carmarthenshire under the 2022-based *Principal* projection is, however, counteracted by increased population loss through natural change, resulting in comparable overall levels of population growth

5.3 In conclusion the above and the appended Edge analytics report clearly demonstrate a broad alignment between the 2022-based projections and the population and household growth identified within the Revised LDP (*PG-10Y (2019)* scenario). Consequently, having reviewed the projections and their potential implications for the Revised Carmarthenshire LDP it is not considered that any substantive changes to the Revised Plan are required.

5.4 Any factual amendments to reflect the publication of the 2022-based projections will be addressed within the Minor Editorial Changes published in conjunction with the Matters Arising Changes.