



**Irish Maritime**  
Development Office



*Foras na Mara*  
*Marine Institute*

# UNITISED TRAFFIC REPORT Q1 & Q2 2023

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# UNITISED TRAFFIC REPORT – Q1 & Q2 2023

## ABOUT THE IMDO

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The Irish Maritime Development Office (IMDO) operates within, and is part of, the Marine Institute. The IMDO provides development, promotional and marketing support to the shipping and shipping services sector. It the aim of the IMDO to be the focal point for national and international maritime businesses in Ireland. The IMDO provides government and industry with a range of information and reporting across the sector and works with international businesses to help them set up or expand in Ireland.

Along with quarterly economic analysis and academic research, the IMDO produces an annual statistical bulletin on the Irish shipping market; The Irish Maritime Transport Economist. This is Ireland's most comprehensive source of national maritime traffic data. Past editions of the Irish Maritime Transport Economist are available from the IMDO [website](#).

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## NOTES

1. **UK Landbridge:** The UK Landbridge is a term used to describe a route to market that connects Irish importers and exporters to international markets via the UK road and ports network. It is a strategically important means of access to the single market that has been favoured by traders in high value or time sensitive goods because it offers significantly faster transit times than alternative routes. The reintroduction of customs controls as a consequence of Brexit increases transit times and places additional costs on Irish businesses that undermines their competitiveness in accessing international markets.
2. **RoRo (Roll-on Roll-off):** RoRo involves vessels designed to carry wheeled cargo, such as cars, trucks, semi-trailer trucks, trailers, etc., that can be driven on and off the ship on their own wheels, or using a platform vehicle, such as a self-propelled modular transporter.
3. **LoLo (Lift-on Lift-off):** LoLo involves a specific ship that engages in the transportation of containerized freight, that is loaded and unloaded by ship-to-shore cranes.
4. **TEU:** The twenty-foot equivalent unit (often TEU or teu) is a unit of cargo often used to describe the capacity of container ships and container terminals.
5. **RoPax:** The sector that uses vessels capable of carrying passengers, passenger vehicles, and RoRo freight
6. **Ireland / ROI / Irish:** Republic of Ireland
7. **NI:** Northern Ireland
8. **GB:** Great Britain
9. **ROI – EU:** RoRo services operating between Dublin, Cork or Rosslare Europort, and a mainland European Port that is inside the European Union
10. **ROI – GB:** RoRo services operating between Dublin, Cork or Rosslare Europort, and a port in Great Britain.
11. For **Data requests**, please contact the IMDO team.

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## Executive Summary

In the first six months of 2023, the volumes handled by the Roll-on/Roll-off (RoRo) and Lift-on/Lift-off cargo modes at Irish ports declined significantly. When compared to the first half of 2022, RoRo volumes fell by 3%, equivalent to 20,000 fewer RoRo units. LoLo traffic fell by 9%, or 55,000 TEU's, over the same period.

The predominant driver of these declines has been inflation, which has risen considerably both at home and abroad over the last 18 months. Beginning with a rapid rise in energy costs in early 2022, the cost of transporting goods, and the cost of goods themselves, has risen sharply. This has suppressed trade at our ports, with traffic on almost all routes declining to some degree. This report analyses the performance of the unitised (i.e. RoRo and LoLo) freight markets throughout these tough economic conditions.

The report is split into three sections. In section 1, the performance of RoRo traffic in Q1 and Q2 2023 is detailed. The same is provided for LoLo traffic in Section 2. In Section 3, an appendix is provided which includes data for all cargo modes - including bulk traffic, passenger traffic and the IMDO's iShip index - for the first six months of the year.

In the RoRo market, volumes in Q1 and Q2 declined by 4% and 3% respectively. Volumes in both quarters were below the long term trend for the sector, the benchmark for which is approximately 300,000 units per quarter. When seasonally adjusted, RoRo traffic declined on a quarterly basis in four of the last five quarters. Rosslare-Europort was the only port to record an increase compared to 2022. This was driven by an announcement in late 2022 that a Cork-Zeebrugge service operated by Grimaldi would move to Rosslare Europort. Finnlines, a Finnish shipping company that is part of the Grimaldi Group, now operates the service from Rosslare.

The breakdown in RoRo traffic between ports in mainland Great Britain (ROI – GB) and ports in mainland Europe (ROI – EU) has now exhibited the same post-Brexit trends for ten consecutive quarters. ROI – EU, or direct, RoRo traffic continues to represent 1 in 3 RoRo units, compared to 1 in 6 prior to January 2021.<sup>1</sup> As a result, there is no immediate sign of a return to the pre-Brexit makeup of the Irish RoRo freight market.

In the LoLo market, volumes in Q1 and Q2 declined by 7% and 11% respectively. The declines in LoLo traffic were also reflected at an international level. As described in Section 2, global seaborne trade indicators for container traffic exhibited sharp declines, particularly in the early months of 2023, a trend that was mirrored at Irish ports.

Overall, the volumes recorded in the unitised freight market at Irish ports in the first half of 2023 were sluggish, below trend, and reflective of the suppressive effect inflation has had on international trade volumes. However, there are several reasons to be optimistic about the near future for Irish maritime traffic. Firstly, inflation has begun to ease across the EU. In Ireland, the inflation rate in July was 4.6%, its lowest level since September 2021. Secondly, according to latest Central Bank reports, domestic growth in Ireland remains robust and is higher than what was expected earlier in the year. Unemployment is extremely low, and this is creating resilience within the economy. Abroad, EU growth is subdued, while US growth is improving. Both are also buoyed by high employment levels. Most importantly, global inflation rates are easing.

In all, there are positive signals that the declines recorded at Irish ports may be temporary, and that the worst period may have passed. As we have seen from the disruption caused by both Brexit and COVID-19 in recent years, there is a resilience in the Irish maritime freight market that is essential to overcoming economic headwinds such as these.

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<sup>1</sup> For detailed information on the post-Brexit trends in RoRo traffic and their underlying causes, please see the IMDO's annual report, the [Irish Maritime Transport Economist, Volume 20](#).

## 1. Roll-on / Roll-off (RoRo)

### Q1 2023, RoRo

Table 1 illustrates the volumes of RoRo traffic handled at ports across the island of Ireland in the first quarter of 2023. It presents total RoRo volume, encompassing both accompanied and unaccompanied RoRo traffic.

**Table 1:**

Port	Q1 2022	Q1 2023	Growth	
Port	RoRo Units	RoRo Units	%	Diff
Dublin	250,177	237,525	-5%	-12,652
Rosslare-Europort	47,399	50,567	7%	3,169
Cork	2,653	1,313	-51%	-1,340
<b>Republic of Ireland</b>	<b>300,229</b>	<b>289,405</b>	<b>-4%</b>	<b>-10,824</b>
Belfast	153,295	147,429	-4%	-5,866
Larne	39,818	41,236	4%	1,418
Warrenpoint	27,845	25,944	-7%	-1,901
<b>Northern Ireland</b>	<b>220,958</b>	<b>214,609</b>	<b>-3%</b>	<b>-6,349</b>
<b>All-Island</b>	<b>521,187</b>	<b>504,014</b>	<b>-3%</b>	<b>-17,173</b>

RoRo traffic in the Republic of Ireland declined by 4% in the first quarter of 2023 when compared to the same period in 2022. The decline was equivalent to a 10,824 fewer RoRo units. Rosslare-Europort was the only port to record an increase compared to Q1 2022, with volumes at the port rising by 7%, or 3,169 units. The increase at Rosslare was driven by an announcement in the third quarter of 2022 that a Cork-Zeebrugge service operated by Grimaldi would move to Rosslare Europort. Finnlines, a Finnish shipping company that is part of the Grimaldi Group, now operates the service from Rosslare.

Despite the 4% decline, there are encouraging signs within the performance of RoRo traffic in Q1 2023. Firstly, on a seasonally adjusted basis, RoRo volumes rose by 5% when compared to the fourth quarter of 2022<sup>2</sup>. Although Q4 2022 was relatively subdued, volumes bounced back encouragingly in Q1 2023, and did exhibit organic growth.

Secondly, volumes in Q1 2022 were unusually strong. In Q1 2022, RoRo volumes recorded 300,000 units, surpassing expectations for the first quarter of the year. This was reflective of the strong start exhibited by global trade volumes in early 2022, which occurred prior to the Russian invasion of Ukraine and the subsequent sharp increases in prices, particularly energy prices.

In all, the long term trend for quarterly RoRo traffic is approximately 300,000 units. Volumes in the first quarter of 2023 are just below this benchmark once seasonal adjustments are considered. At 289,405 units, this is a resilient performance, particularly given the inflationary pressures evident throughout this period.

From a port perspective, the introduction of the Zeebrugge service increased the RoRo market share held by Rosslare-Europort from 16% in Q1 2022, to 17.5% in Q1 2023. Dublin Port held an 82% share of ROI RoRo traffic this quarter, while Cork held 0.5%.

<sup>2</sup> RoRo volumes in the first quarter of a given year are typically 5% below average

In Northern Ireland, RoRo volumes fell by 3% in Q1 2023, equivalent to a decline of 6,349 RoRo units. Larne was the only port to record an increase compared to Q1 2022. However, this was expected as Larne RoRo traffic was impacted in early 2022 by a disruption to P&O's service to Cairnryan. Services were cancelled or disrupted for roughly 3 weeks beginning in late March 2022. As a result, Larne's RoRo volumes during that period were significantly below average.

### Q1 2023 RoRo by Route

In Tables 2 and 3, RoRo volume is separated by route, where ROI – GB represents ferry routes between Dublin Port and Rosslare-Europort, and mainland Great Britain ports including Holyhead, Liverpool, Heysham, Pembroke and Fishguard. ROI – EU represents routes between Dublin, Cork and Rosslare – Europort, and nine mainland European ports<sup>3</sup>.

**Table 2:**

Route	Q1 2022	Q1 2023	Growth	
	RoRo Units	RoRo Units	%	Diff
Dublin - EU	66,410	58,030	-13%	-8,380
Rosslare - EU	31,242	35,631	14%	4,389
Cork - EU	2,653	1,313	-51%	-1,340
<b>ROI - EU</b>	<b>100,305</b>	<b>94,974</b>	<b>-5%</b>	<b>-5,331</b>

**Table 3:**

Route	Q1 2022	Q1 2023	Growth	
	RoRo Units	RoRo Units	%	Diff
Dublin - GB	183,767	179,495	-2%	-4,272
Rosslare - GB	16,157	14,936	-8%	-1,220
<b>ROI - GB</b>	<b>199,924</b>	<b>194,431</b>	<b>-3%</b>	<b>-5,492</b>

In the first quarter of 2023, the breakdown of ROI RoRo traffic in EU and GB categories continued to follow its post-Brexit pattern, which has been evident since early 2021. ROI – EU traffic continues to represent 1 in 3 of all RoRo units, compared to 1 in 6 prior to the end of the Brexit transition period in 2021. ROI – GB traffic represents two thirds of all ROI RoRo traffic. This shift, driven by a reduction in the use of the UK Landbridge, has now been evident for nine consecutive quarters, with no significant trajectory towards pre-Brexit patterns.

In Table 2, the impact of the move of the Zeebrugge RoRo service from the Port of Cork to Rosslare-Europort is evident. Cork's RoRo traffic, all of which is to mainland EU ports, fell significantly between the first quarters of 2022 and 2023, while Rosslare – EU traffic rose by 14%, or 4,389 units. On 16th February 2023, Finnlines announced that a second vessel will be added to this route from Rosslare, further increasing capacity on direct, ROI – EU RoRo services<sup>4</sup>. This is emblematic of the staying power of post-Brexit trend towards direct ROI–EU RoRo routes.

Of the total decline in Irish RoRo traffic in Q1 2023, roughly half of this came on ROI – EU routes, despite those routes only representing one third of ROI RoRo traffic. As such, direct EU routes bore a disproportionately large share of the decline in RoRo traffic in Q1 2023.

<sup>3</sup> The nine mainland European ports are: Bilbao, Cherbourg, Dunkirk, Le Harve, Leixoes, Roscoff, Rotterdam, Santander, Zeebrugge

<sup>4</sup> [Second vessel to be added to Rosslare-Zeebrugge route, RTE](#)

## Q2 2023, RoRo

Table 4 illustrates the volumes of RoRo traffic handled at ports across the island of Ireland in the second quarter of 2023. It presents total RoRo volume, encompassing both accompanied and unaccompanied RoRo.

**Table 4:**

RoRo	Q2 2022	Q2 2023	Growth	
Port	RoRo Units	RoRo Units	%	Diff
Dublin	255,890	246,303	-4%	-9,587
Rosslare-Europort	46,498	48,114	3%	1,616
Cork	3,493	2,070	-41%	-1,423
<b>Republic of Ireland</b>	<b>305,881</b>	<b>296,487</b>	<b>-3%</b>	<b>-9,394</b>
Belfast	159,402	160,831	1%	1,429
Larne	35,798	37,138	4%	1,340
Warrenpoint	29,567	28,698	-3%	-869
<b>Northern Ireland</b>	<b>224,767</b>	<b>226,667</b>	<b>1%</b>	<b>1,900</b>
<b>All-Island</b>	<b>530,648</b>	<b>523,154</b>	<b>-1%</b>	<b>-7,494</b>

RoRo traffic in the Republic of Ireland declined by 3% on an annual basis in the second quarter of 2023. This was equivalent to a decline of 9,394 RoRo units. As in Q1, Rosslare-Europort was the only port to record an increase compared to 2022. This was underscored by the arrival of the new Finnlines service to Zeebrugge, which had previously operated via the Port of Cork.

Unlike in Q1 2022, there is less reason to view the volumes handled in Q2 2023 positively. On a seasonally adjusted basis, RoRo volumes between the first and second quarters of 2023 declined by 5%<sup>5</sup>. As highlighted in the previous section, the long term trend for RoRo traffic predicts a total of approximately 300,000 per quarter. With seasonal factors considered, Q2 2023 falls short of this level.

The inflationary pressures of the past twelve months have placed downward pressure on the volume of both RoRo and LoLo traffic at Irish ports. Both cargo modes predominantly carry finished, durable goods that are destined for a retail setting. As a result, the rate of inflation is a key performance indicator. In all, volumes handled in the Q2 2023 are below par, but not by a significant margin, and are capable of rebounding quickly. RoRo traffic remains resilient, especially given the scale of the increase in prices in the past year.

In Northern Ireland, RoRo traffic grew by 1% compared to Q2 2022. The largest increase came at Larne, where volumes rose by 4%. As in Q1, this was underpinned by the unusually low volumes recorded in March and April of 2022. Belfast recorded a strong total of 160,831 units. This is the largest quarterly total that the IMDO has recorded for Belfast, and it builds on the previous record which was set in Q2 2022. Beginning in early 2022, Belfast has consistently represented 70% of all RoRo traffic at Northern Ireland ports, compared to an average of 63% held for the previous ten years.

## Q2 2023 RoRo by Route

In Tables 5 and 6, RoRo volume is separated by route, where ROI – GB represents ferry routes between Dublin Port and Rosslare-Europort, and mainland Great Britain ports including Holyhead, Liverpool, Heysham, Pembroke and Fishguard. ROI – EU represents routes between Dublin, Cork and Rosslare – Europort, and nine mainland European ports.

<sup>5</sup> On average, the three-month period between April and June is the busiest quarter of the year, with volumes typically 3% above average.



**Table 5:**

Route	Q2 2022	Q2 2023	Growth	
	RoRo Units	RoRo Units	%	Diff
Dublin - EU	69,770	63,531	-9%	-6,239
Rosslare - EU	30,291	33,025	9%	2,734
Cork - EU	3,493	2,070	-41%	-1,423
<b>ROI - EU</b>	<b>103,554</b>	<b>98,626</b>	<b>-5%</b>	<b>-4,928</b>

**Table 6:**

Route	Q2 2022	Q2 2023	Growth	
	RoRo Units	RoRo Units	%	Diff
Dublin - GB	186,120	182,772	-2%	-3,348
Rosslare - GB	16,207	15,089	-7%	-1,118
<b>ROI - GB</b>	<b>202,327</b>	<b>197,861</b>	<b>-2%</b>	<b>-4,466</b>

RoRo traffic on both ROI – EU and ROI – GB routes declined in the second quarter of 2023 when compared to Q2 2022. ROI – EU traffic fell by 5%, while ROI – GB traffic fell by 2%. Rosslare – EU was the only route to record an increase, driven by the aforementioned arrival of the Finnlines service to Zeebrugge.

As was the case in the first quarter of 2023, direct EU routes bore a disproportionately large share of the decline in ROI RoRo traffic in Q2. The decline on ROI – EU routes accounted for 52% of the total fall, which is above the 33% share held by these direct routes.

In all, the declines recorded in Q2 are attributable to the economic headwinds in the Irish and international economy, rather than any post-Brexit related shift towards a particular shipping route. As highlighted above, the volumes handled in the Q2 2023 are below par, but not by a significant margin. RoRo traffic remains resilient given the scale and speed of inflation, and volumes will not need to rise by much to return to their 2022 levels.

## RoRo Traffic by Mode

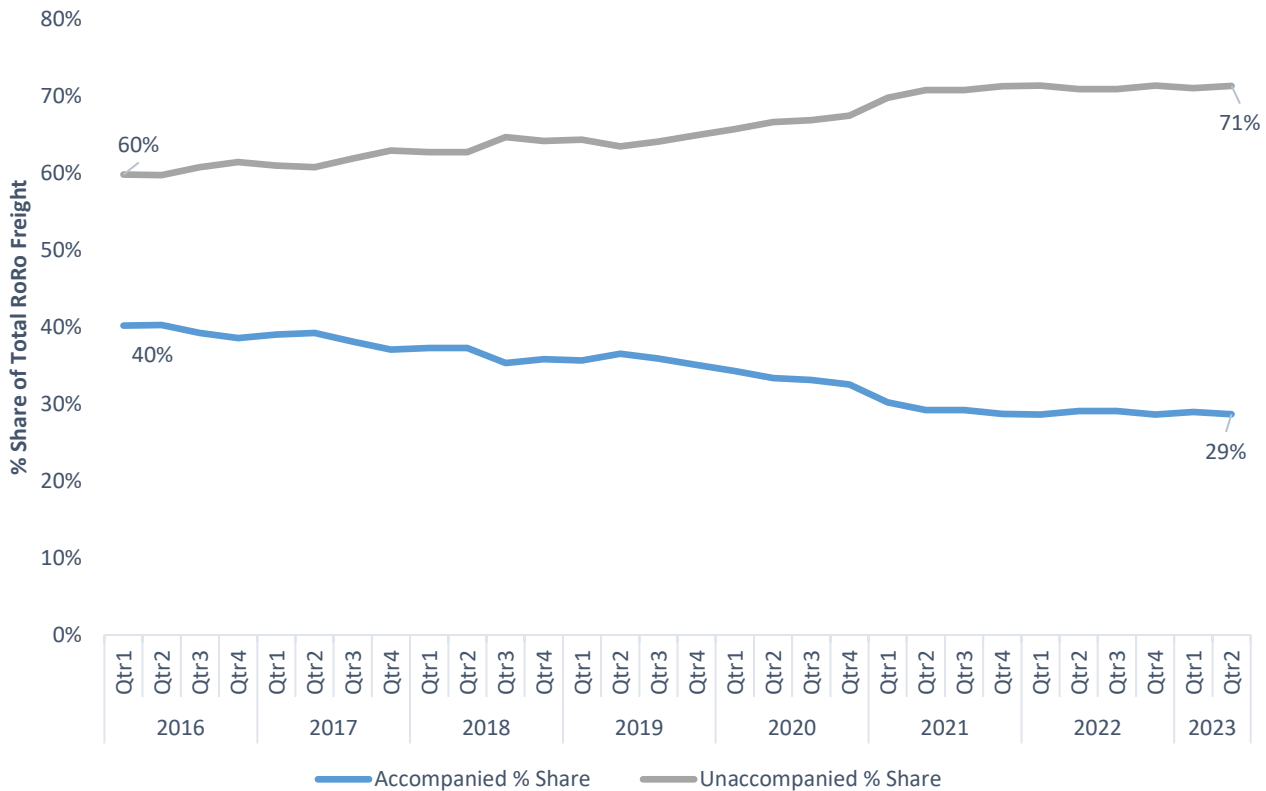
This section provides an update on the share of RoRo freight held by the accompanied and unaccompanied cargo modes. In recent reporting by the IMDO, it was highlighted that the share of unaccompanied RoRo traffic in the Republic of Ireland has been increasing, and that this trend has been a persistent feature of the RoRo market since at least 2016.

RoRo traffic can be either accompanied, or unaccompanied. Unaccompanied RoRo traffic refers to the transfer of RoRo units without a driver, and thus without a driver’s cab, accompanying the container on the vessel. Instead, the RoRo unit, or container, is dropped to the departure port by a driver. From there, it is loaded onto the vessel by port staff, and travels unaccompanied on the voyage. It is collected at the destination port by a local haulier.

Unaccompanied RoRo traffic demands less physical capacity while on a vessel, as there is no driver’s cabin. However, it demands greater physical capacity at port terminals, compared to accompanied traffic. This is because RoRo units are stored in slots at port terminals while they await loading onto a vessel, or collection by a local haulier. Consequently, increases in unaccompanied traffic have knock-on effects for the long term capacity calculations for Ireland’s RoRo ports.

The gap between accompanied and unaccompanied RoRo traffic is illustrated in Figure 1 below, which shows the percentage share held by each mode between 2016 and the midway point of 2023. Overall, the share of unaccompanied RoRo has risen from 60% in 2016, to 71% in Q2 2021. Since that point, the growth in unaccompanied as a share of total RoRo traffic has stabilised. For eight consecutive quarters between Q2 2021 and Q2 2023, the share of RoRo traffic held by the unaccompanied mode has been 71%.

**Figure 1:**



## 2. Lift-on / Lift-off (LoLo)

### Q1 2023, LoLo

Table 7 presents the volumes of LoLo traffic handled at ports across the island of Ireland in the first quarter of 2023. It presents total LoLo volume, measured in Twenty-foot equivalent units (TEUs). It encompasses both laden (full) and unladen (empty) LoLo volume.

**Table 7:**

LoLo	Q1 2022	Q1 2023	Growth	
Port	LoLo TEU's	LoLo TEU's	%	Diff
Dublin	202,776	191,286	-6%	-11,491
Cork	70,066	63,774	-9%	-6,292
Waterford	11,216	8,077	-28%	-3,139
<b>Republic of Ireland</b>	<b>284,058</b>	<b>263,136</b>	<b>-7%</b>	<b>-20,922</b>
Belfast	59,173	51,009	-14%	-8,164
Warrenpoint	2,745	-	-100%	-2,745
<b>Northern Ireland</b>	<b>61,918</b>	<b>51,009</b>	<b>-18%</b>	<b>-10,909</b>
<b>All-Island</b>	<b>345,976</b>	<b>314,145</b>	<b>-9%</b>	<b>-31,831</b>

As highlighted at the outset of this report, heightened levels of global inflation have been the most significant factor placing downward pressure on RoRo and LoLo volumes at Irish ports in the last 12 months. In Table 7, this suppressive effect of higher prices is clearly evident on LoLo, or container, traffic.

At 263,136 TEU's, container volumes declined by 7% in the first quarter of 2023, when compared to the same period in 2022. This total is the lowest of the post-Brexit era. As the majority of LoLo routes in Ireland are direct to mainland EU ports, Brexit had a significant and positive effect on container volumes, beginning in early 2021<sup>6</sup>. In the first quarter of both 2021 and 2022, LoLo volumes surpassed 280,000 TEU's, and LoLo traffic continued to set records over the following two years. In Q1 2023 volumes are closer to those of Q1 2019, when just over 258,000 TEUs were handled. Overall, the long term trajectory of LoLo volumes in the Republic of Ireland predict a quarterly total of 295,000 TEUs. The volumes in Q1 2023, even when seasonally adjusted, are currently below trend, and the main driver of this is inflation.

The sluggish volumes of Q1 2022 are not isolated to Irish ports only. The Global Seaborne Container Trade Indicator<sup>7</sup>, developed by Clarkson's research, shows that global container trade underperformed 2022 in the first three months of this year. When compared to the same months in 2022, this metric declined by 11% in January and by 8% in February. During this period (Q1 2023), the inflation rate across the European Union averaged 9.4%<sup>8</sup>. In Ireland, the rate was 7.5%.

There were similar impacts on LoLo volumes in Northern Ireland. The total at Belfast was the lowest for a first quarter since 2015, and is significantly below the 59,173 TEUs handled in Q1 2022. In addition, Warrenpoint has now had three consecutive quarters without any LoLo traffic. For the island in total, LoLo traffic fell by 9% in the first quarter of 2023.

<sup>6</sup> For more information on the post-Brexit performance of LoLo traffic, please see the latest edition of the IMDO's annual report, [Irish Maritime Transport Economist](#).

<sup>7</sup> See Clarkson's Shipping Intelligence Network [here](#).

<sup>8</sup> As measured by the Harmonised Index of Consumer Prices, [Eurostat](#)

## Q2 2023, LoLo

Table 8 presents the volumes of LoLo traffic handled at ports across the island of Ireland in the second quarter of 2023. It presents total LoLo volume, measured in Twenty-foot equivalent units (TEUs). It encompasses both laden (full) and unladen (empty) LoLo volume.

**Table 8:**

LoLo	Q2 2022	Q2 2023	Growth	
Port	LoLo TEU's	LoLo TEU's	%	Diff
Dublin	222,626	198,845	-11%	-23,782
Cork	74,374	67,318	-9%	-7,056
Waterford	13,485	10,687	-21%	-2,799
<b>Republic of Ireland</b>	<b>310,485</b>	<b>276,849</b>	<b>-11%</b>	<b>-33,636</b>
Belfast	57,646	52,272	-9%	-5,374
Warrenpoint	3,101	-	-100%	-3,101
<b>Northern Ireland</b>	<b>60,747</b>	<b>52,272</b>	<b>-14%</b>	<b>-8,475</b>
<b>All-Island</b>	<b>371,232</b>	<b>329,121</b>	<b>-11%</b>	<b>-42,111</b>

The slow-moving LoLo volumes continued in the second quarter of 2023, as container traffic in the Republic of Ireland declined by 11% on an annual basis. This was equivalent to 33,636 fewer TEU's handled. It should be noted that Q2 2022 was a record-breaking quarter for Irish LoLo traffic. Dublin recorded a total of 222,626 TEU's, its highest total recorded by the IMDO. This momentum was halted thereafter as global energy prices rose sharply, driving increases in global inflation. Quarterly LoLo traffic in the Republic of Ireland has not surpassed 300,000 TEU's since.

As highlighted above, the long term trends for Irish LoLo traffic set a benchmark of approximately 295,000 TEU's. The volumes recorded in Q2 2023 are below this level, but there are reasons to conclude that these subpar volumes may be temporary. Inflation - the key driver of these declines not just in Ireland, but in global container trade – eased slightly in the Spring of 2023. In the EU, inflation fell back to 7.2% from 9.4%. In Ireland, it fell back to 5.5%. Furthermore, inflation for Ireland in July 2023 was recorded at 4.6%, its lowest level since September 2021.

There were also encouraging results in the latest performance of Clarkson's Global Seaborne Container Trade Indicator. In Q2 2023, this metric declined by 2.8% on an annual basis, a significant improvement on the 8.3% averaged recorded in Q1 2023. There are signs therefore, that as inflation eases, there are positive impacts for global seaborne trade volumes, the network for which Ireland is heavily reliant upon.

A similar story is true for LoLo traffic in Northern Ireland. Volumes began the first two quarters of 2022 strongly, before declining below 60,000 TEU's for the next four consecutive quarters. For Belfast and Warrenpoint however, the volumes handled in Q2 2023 are the lowest for the last decade<sup>9</sup>, which is reflective of the sharpness of the declines that took hold in 2022.

Overall, across the first half of 2023, the declines in the LoLo market were steeper than those in the RoRo market. In some parts, this is reflective of the differences in elasticity within the two sectors. When compared to goods transported in the RoRo market, a higher proportion of LoLo products are manufactured, or durable goods, and are more likely to have come from a greater distance, e.g. China, or North America, increasing sensitivity to the recent rise in transport costs. A greater proportion of RoRo traffic is comprised of food, which are often time-sensitive, and relatively more inelastic. They are

<sup>9</sup> Excluding Q2 2020, when volumes were disrupted by the initial wave of the COVID-19 pandemic

more likely to have come from a shorter distance, e.g. Great Britain. This explains some of the differences in the declines recorded in this report, however, both cargo modes are effective substitutes for one another and the choice of cargo mode will depend on the needs of the importer or exporter.

### 3. Appendix

The tables in this section will provide an overview of the performance of the unitised (i.e. RoRo and LoLo) markets, as well as the passenger and bulk markets, for the period between January and June (H1) of 2023. It will also provide an update on the IMDO's iShip index, a quarterly weighted indicator that outlines trends within Ireland's shipping industry.

**Table 9: Roll-on/Roll-off, Accompanied and Unaccompanied**

RoRo	H1 2022	H1 2023	Growth	
Port	RoRo Units	RoRo Units	%	Diff
Dublin	506,067	483,828	-4%	-22,239
Rosslare-Europort	93,896	98,681	5%	4,785
Cork	6,146	3,383	-45%	-2,763
<b>Republic of Ireland</b>	<b>606,109</b>	<b>585,892</b>	<b>-3%</b>	<b>-20,218</b>
Belfast	312,697	308,260	-1%	-4,437
Larne	75,616	78,374	4%	2,758
Warrenpoint	57,412	54,642	-5%	-2,770
<b>Northern Ireland</b>	<b>445,725</b>	<b>441,276</b>	<b>-1%</b>	<b>-4,449</b>
<b>All-Island</b>	<b>1,051,834</b>	<b>1,027,168</b>	<b>-2%</b>	<b>-24,667</b>

**Table 10: Lift-on/Lift-off, Laden and Unladen**

LoLo	H1 2022	H1 2023	Growth	
Port	LoLo TEU's	LoLo TEU's	%	Diff
Dublin	425,402	390,130	-8%	-35,272
Cork	144,440	131,092	-9%	-13,348
Waterford	24,701	18,764	-24%	-5,938
<b>Republic of Ireland</b>	<b>594,543</b>	<b>539,986</b>	<b>-9%</b>	<b>-54,558</b>
Belfast	116,819	103,281	-12%	-13,538
Warrenpoint	5,846	-	-100%	-5,846
<b>Northern Ireland</b>	<b>122,665</b>	<b>103,281</b>	<b>-16%</b>	<b>-19,384</b>
<b>All-Island</b>	<b>717,208</b>	<b>643,266</b>	<b>-10%</b>	<b>-73,942</b>

**Table 11: Tourist Passengers**

<b>Tourist Passengers</b>	<b>H1 2022</b>	<b>H1 2023</b>	<b>Growth</b>	
<b>Port</b>	<b>No.</b>	<b>No.</b>	<b>%</b>	<b>Diff</b>
Dublin	667,815	758,454	14%	90,639
Rosslare-Europort	214,535	234,926	10%	20,391
Cork	46,006	47,351	3%	1,345
<b>Republic of Ireland</b>	<b>927,738</b>	<b>1,044,713</b>	<b>13%</b>	<b>116,975</b>
Belfast	798,559	760,388	-5%	-38,171
Larne	135,884	174,117	28%	38,233
<b>Northern Ireland</b>	<b>934,443</b>	<b>934,505</b>	<b>0%</b>	<b>62</b>
<b>All-Island</b>	<b>1,862,181</b>	<b>1,979,218</b>	<b>6%</b>	<b>117,037</b>

**Table 12: Passenger Vehicles**

<b>Passenger Vehicles<sup>10</sup></b>	<b>H1 2022</b>	<b>H1 2023</b>	<b>Growth</b>	
<b>Port</b>	<b>No.</b>	<b>No.</b>	<b>%</b>	<b>Diff</b>
Dublin	157,328	171,582	9%	14,254
Rosslare-Europort	88,401	92,906	5%	4,505
Cork	15,222	14,527	-5%	-695
<b>Republic of Ireland</b>	<b>261,303</b>	<b>282,890</b>	<b>8%</b>	<b>21,587</b>
Belfast	207,628	187,352	-10%	-20,276
Larne	36,016	50,476	40%	14,460
<b>Northern Ireland</b>	<b>243,644</b>	<b>237,828</b>	<b>-2%</b>	<b>-5,816</b>
<b>All-Island</b>	<b>504,947</b>	<b>520,718</b>	<b>3%</b>	<b>15,771</b>

**Table 12: Dry Bulk Throughput**

<sup>10</sup> Passenger Vehicles includes cars, coaches, trailers, motorcycles, etc.

Dry Bulk Tonnes	H1 2022	H1 2023	Growth	
Port	Tonnes	Tonnes	%	Tonnes
Dublin	1,094,440	1,014,591	-7%	-79,849
Cork	740,116	605,253	-18%	-134,863
Drogheda	360,159	377,079	5%	16,920
Dundalk	28,307	19,522	-31%	-8,785
Galway	104,578	102,759	-2%	-1,819
Greenore	667,906	538,085	-19%	-129,821
Waterford	825,654	689,932	-16%	-135,722
New Ross	114,172	67,323	-41%	-46,849
Shannon Foynes	4,463,563	3,366,532	-25%	-1,097,031
<b>Total Republic of Ireland</b>	<b>8,398,895</b>	<b>6,781,076</b>	<b>-19%</b>	<b>-1,617,819</b>
Belfast	3,482,888	2,932,161	-16%	-550,727
Foyle	532,804	429,928	-19%	-102,876
Larne	8,081	7,171	-11%	-910
Warrenpoint	163,037	182,370	12%	19,333
<b>Total Northern Ireland</b>	<b>4,186,810</b>	<b>3,551,630</b>	<b>-15%</b>	<b>-635,180</b>
<b>Total All-Island</b>	<b>12,585,705</b>	<b>10,332,706</b>	<b>-18%</b>	<b>-2,252,999</b>

**Table 13: Liquid Bulk Throughput**

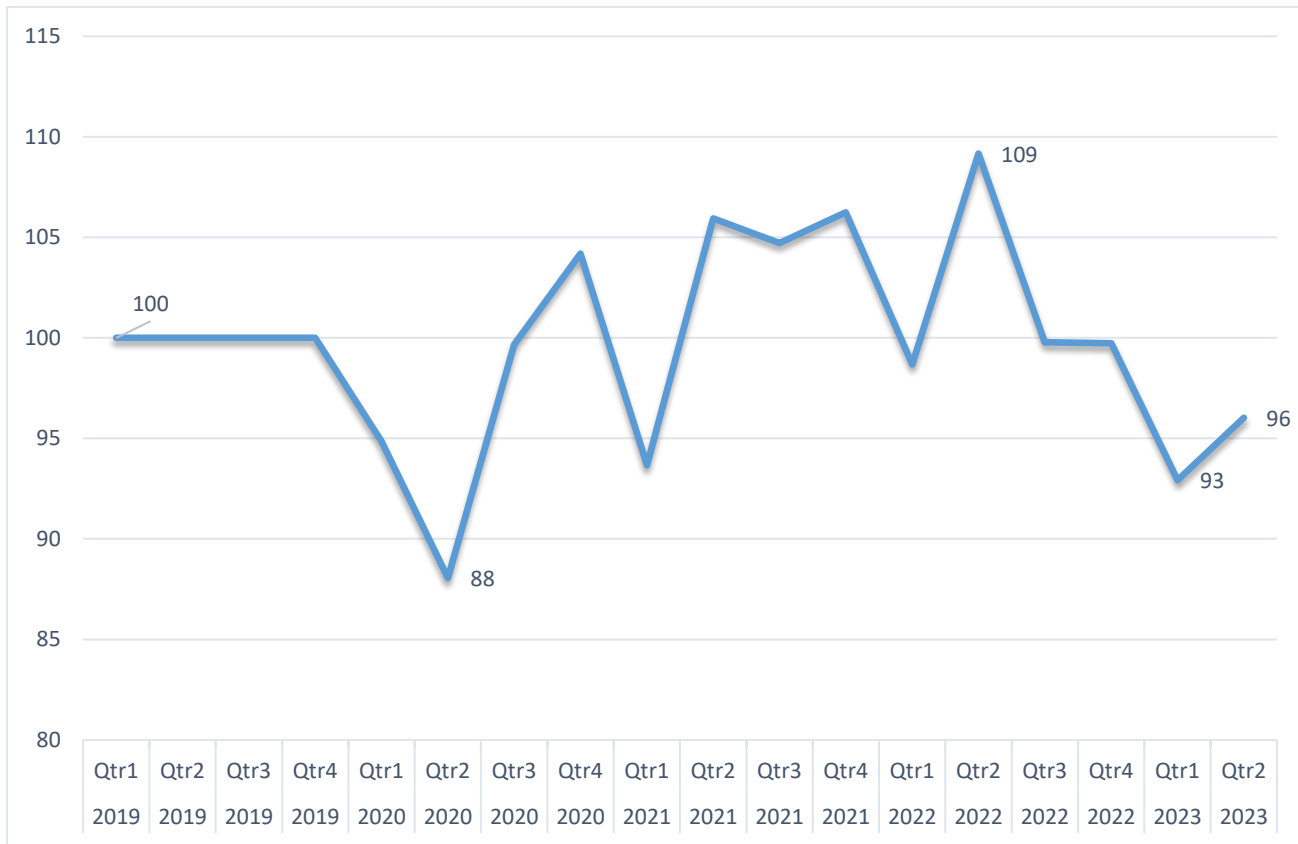
Liquid Bulk	H1 2022	H1 2023	Growth	
Port	Tonnes	Tonnes	%	Tonnes
Bantry	117,436	228,809	95%	111,373
Dublin	2,345,528	2,320,102	-1%	-25,426
Cork	2,459,131	2,531,497	3%	72,366
Drogheda	15,275	15,965	5%	690
Galway	125,483	130,436	4%	4,953
Shannon Foynes	595,216	505,934	-15%	-89,283
<b>Total Republic of Ireland</b>	<b>5,658,069</b>	<b>5,732,742</b>	<b>1%</b>	<b>74,674</b>
Belfast	940,763	940,244	0%	-519
Foyle	331,404	388,568	17%	57,164
Larne	3,771	2,197	-42%	-1,574
Warrenpoint	22,176	17,439	-21%	-4,737
<b>Total Northern Ireland</b>	<b>1,298,114</b>	<b>1,348,448</b>	<b>4%</b>	<b>50,334</b>
<b>All-Island</b>	<b>6,956,183</b>	<b>7,081,190</b>	<b>2%</b>	<b>125,007</b>

**Table 14: Break Bulk Throughput**



Break Bulk	H1 2022		H1 2023		Growth	
	Port	Tonnes	Tonnes	%	Tonnes	
Dublin		32,956	27,568	-16%	-5,388	
Cork		155,849	127,079	-18%	-28,770	
Drogheda		132,112	141,533	7%	9,421	
Dundalk		9,076	9,545	5%	470	
Galway		0	5,953		5,953	
Greenore		77,292	72,578	-6%	-4,714	
Waterford		87,347	84,431	-3%	-2,916	
Shannon Foynes		165,507	139,975	-15%	-25,532	
Wicklow		78,764	74,438	-5%	-4,326	
Youghal		2,280	0	-100%	-2,280	
<b>Total Republic of Ireland</b>		<b>741,182</b>	<b>683,100</b>	<b>-8%</b>	<b>-58,083</b>	
Belfast		158,011	143,619	-9%	-14,392	
Foyle		37,388	35,794	-4%	-1,594	
Warrenpoint		190,306	184,614	-3%	-5,692	
<b>Total Northern Ireland</b>		<b>385,705</b>	<b>364,027</b>	<b>-6%</b>	<b>-21,677</b>	
<b>Total All-Island</b>		<b>1,126,887</b>	<b>1,047,127</b>	<b>-7%</b>	<b>-79,760</b>	

**Figure 2: iShip Index, 2019 = 100<sup>11</sup>**



<sup>11</sup> The iShip Index is a quarterly weighted indicator that outlines trends within Ireland’s shipping industry. The index accounts for five separate market segments, representing the main maritime traffic modes moving through ports in Ireland. All three of the bulk segments are measured in tonnes. In order to establish a common denominator, LoLo and RoRo volumes are expressed in tonnage terms within the index, whereby 1 Twenty-Foot Equivalent Unit (TEU) = 10 tonnes, and 1 RoRo Freight Unit = 14 tonnes. The base period of the iShip index has been set at 2019.