Irish Maritime Development Office

Foras na Mara
Marine Institute

UNITISED TRAFFIC REPORT H1 2024

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UNITISED TRAFFIC REPORT – H1 (Q1 + Q2) 2024

ABOUT THE IMDO

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.

The IMDO Economics team provide quarterly economic analysis, academic research, and regular policy advice to the Department of Transport relating to the Irish shipping market, ports and Irish trade. The IMDO will be centrally involved in the review of National Ports Policy in 2024. 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 favored 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

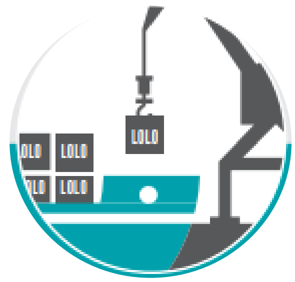
10. **ROI – GB**: RoRo services operating between Dublin, Cork or Rosslare Europort, and a port in Great Britain.

11. For **Data requests,** please contact the IMDO team.

UNITISED TRAFFIC GROWTH IN H1 2024 (Vs H1 2023)

ROI RORO: -1%

NI RORO: 2%



ROI LOLO: 8%

NI LOLO: 6%

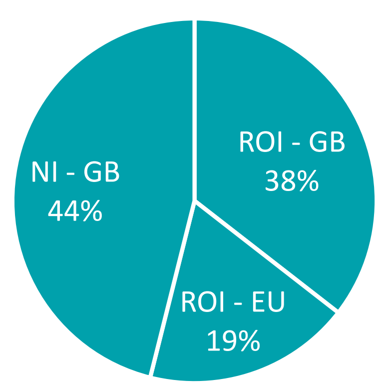
ROI Tourist Passengers: -3%

NI Tourist Passengers: -1%

ROI – EU RoRo: -1%

ROI – GB RoRo: -1%

All Island RoRo Share



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Executive Summary

The first half of 2024 has been marked by resilience and steady performance in Ireland's maritime transport sector. Despite global economic challenges over the past 12 months, including inflationary pressures and shifting energy demands, Irish ports have maintained strong throughput levels, highlighting their critical role in supporting the national economy.

Strong Economic Environment

Ireland's broader economic environment has been favorable, with the Central Bank of Ireland noting a robust rebound from the pandemic and other global disruptions. Rising real incomes, a surge in residential construction, and stabilizing activities in multinational-dominated sectors have underpinned both domestic and headline economic growth in 2024. This positive economic backdrop has been crucial in sustaining the volume of goods passing through Irish ports, even as the global shipping market grapples with challenges.

Roll-on/Roll-off (RoRo) Traffic

RoRo traffic across Irish ports remained stable in the first half of 2024. The Republic of Ireland's ports handled 584,212 units, a slight 1% decrease from the previous year, largely due to very modest declines at Dublin and Rosslare-Europort. In Northern Ireland, RoRo traffic increased by 2%, driven by strong performances at Larne and Warrenpoint.

The first half of 2024 saw a mixed performance in Roll-on/Roll-off (RoRo) traffic between the Republic of Ireland and Great Britain (ROI-GB) and between the Republic of Ireland and mainland Europe (ROI-EU). ROI-GB routes recorded a slight decline of 1%, with 4,180 fewer units compared to H1 2023. Despite this, the ROI-GB market remains steady, indicating stable demand and market conditions. ROI-EU routes also experienced a minor decline of 1%, with 1,556 fewer units. However, the volume on these routes remains significantly higher than pre-Brexit levels, demonstrating the continued demand for direct services to mainland European ports.

Lift-on/Lift-off (LoLo) Traffic

LoLo traffic experienced a solid upward trajectory, with volumes increasing by 8% across Republic of Ireland ports. Dublin Port was the standout performer, recording a 9% increase in TEUs. As the report shows, this increase at Dublin Port was driven largely by a modal shift in the unitised traffic sector. New LoLo services were added to Dublin Port in the second quarter of 2024, with drove existing RoRo traffic on direct services to mainland European ports to shift towards these new LoLo services.

Cork and Waterford also posted gains, contributing to overall growth. This steady increase in LoLo traffic underscores the adaptability of Irish ports in responding to shifting market demands, particularly in the context of the post-Brexit environment.

Passenger and Passenger Vehicle Traffic

The passenger market at Republic of Ireland ports faced some challenges in H1 2024, with a 3% decrease in overall passenger numbers. Only Cork reported an increase in passenger volumes, offsetting declines in other regions. The passenger vehicle market also saw a slight decline of 4%, reflecting broader pressures in this RoRo segment.

Outlook

As Ireland continues to navigate global economic uncertainties, its ports remain a resilient backbone of the national economy. The Irish Maritime Development Office (IMDO) remains committed to supporting this critical sector, particularly through its involvement in various EU sustainability initiatives. These efforts, combined with the robust economic conditions highlighted by the Central Bank of Ireland, position the Irish maritime sector for continued growth and adaptation in the coming years. This report reinforces the importance of the maritime transport sector in facilitating Ireland's trade and economic stability, ensuring uninterrupted access to international markets through our ports and shipping services.

Roll-on / Roll-off (RoRo)

Table 1 and Table 2 illustrate the volumes of RoRo traffic handled at ports across the island of Ireland in the first and second quarters of 2023 and 2024. Table 3 combines these volumes and illustrates RoRo traffic for the first six months (H1) of those years. These Tables show total RoRo volume, encompassing both accompanied and unaccompanied RoRo traffic.

Table 1:

Port	Q1 2023	Q1 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin	237,525	236,328	-1%	-1,197
Rosslare - Europort	50,234	49,513	-1%	-721
Cork	1,313	2,068	58%	755
Republic of Ireland	**289,072**	**287,909**	**0%**	**-1,163**
Belfast	147,429	146,485	-1%	-944
Larne	41,236	46,441	13%	5,205
Warrenpoint	25,944	27,267	5%	1,323
Northern Ireland	**214,609**	**220,193**	**3%**	**5,584**
All - Island	**503,681**	**508,102**	**1%**	**4,421**

Table 2:

Port	Q2 2023	Q2 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin	246,303	242,206	-2%	-4,097
Rosslare - Europort	52,131	52,190	0%	59
Cork	2,070	1,907	-8%	-163
Republic of Ireland	**300,504**	**296,303**	**-1%**	**-4,201**
Belfast	160,831	161,749	1%	918
Larne	37,138	40,976	10%	3,838
Warrenpoint	28,698	28,953	1%	255
Northern Ireland	**226,667**	**231,678**	**2%**	**5,011**
All - Island	**527,171**	**527,981**	**0%**	**810**

Table 3:

Port	H1 2023	H1 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin	483,828	478,534	-1%	-5,294
Rosslare - Europort	102,365	101,703	-1%	-662
Cork	3,383	3,975	17%	592
Republic of Ireland	**589,576**	**584,212**	**-1%**	**-5,364**
Belfast	308,260	308,234	0%	-26
Larne	78,374	87,417	12%	9,043
Warrenpoint	54,642	56,220	3%	1,578
Northern Ireland	**441,276**	**451,871**	**2%**	**10,595**
All - Island	**1,030,852**	**1,036,083**	**1%**	**5,231**

Republic of Ireland

As evident from Table 3, RoRo volumes through ports in the Republic of Ireland (ROI) held firm in the first six months of the year (H1). A total of 584,212 units were handled at Dublin, Rosslare-Europort and Cork, which is 1% below 2023, equivalent to 5,364 fewer units.

Table 1 and Table 2 present the volume of RoRo traffic for Q1 2024 and Q2 2024, respectively. ROI RoRo traffic in both quarters did not materially change from 2023. In Q1, RoRo volumes fell by 0.4%, while in Q2, volumes fell by 1.4%. Between 2019 and 2023, the average Q1 RoRo total was approximately 285,000 units. Q1 2024 volumes are 1% above this average. Over the same period, the average Q2 RoRo total was 290,000 units. Q2 2024 volumes are 2% above this average.

The H1 volume for 2024 compares favorably with recent years. The five-year average for H1 RoRo units between 2019 and 2023 was approximately 575,000 units. The H1 volume for 2024 is 2% above this average. H1 RoRo volumes peaked in 2022 with 606,000 units, driven by strong post-pandemic demand. The low point for this period came in 2020, with just 537,000 units handled, as the first wave of the COVID-19 pandemic disrupted trade.

For both Dublin Port and Rosslare-Europort, RoRo traffic in the first six months of 2024 was almost identical to that of 2023. Dublin Port handled 5,294 fewer RoRo units, while Rosslare-Europort handled just 662 fewer units. RoRo traffic at Cork however, rose by 17%, or 592 units.

Between 2023 and 2024, the breakdown of the RoRo market shares between Dublin, Rosslare-Europort and Cork did not significantly change. At the halfway stage in 2024, Dublin port still holds an 82% share, while Rosslare-Europort and Cork hold a 17% and 1%, respectively.

Northern Ireland

A similar narrative is reflected in Northern Ireland (NI) ports, where RoRo traffic in the first six months of the year was relatively stable, rising by 2%, equivalent to 10,595 additional units. In Q1 2024, RoRo traffic through Belfast, Larne and Warrenpoint rose by 3%, while in Q2 2024, RoRo traffic rose by 2%.

For NI ports, the H1 volume for 2024 was above those of recent years. The five-year average between 2019 and 2023 was approximately 430,000 units. In 2024, the H1 volume at NI ports is 2% above this average.

In Belfast, Roro traffic for the first half of 2024 was identical to that of 2023, with just 26 RoRo units in the difference. In Warrenpoint, H1 volumes grew by 3%, or 1,578 units.

In Larne, RoRo traffic grew strongly, by 12%, or 9,043 units. RoRo traffic at Larne has failed to surpass 80,000 units in the first half of the year since 2021, when 102,000 units were handled, driven by a surge in post-Brexit demand as Northern Irish hauliers sought to avoid administrative burdens at ROI ports[1]. In 2024, Larne's RoRo traffic has been more reflective of pre-Brexit, pre-COVID-19 volumes.

[1] For more information on the impact of Brexit on the all-island RoRo market, see the Irish Maritime Transport Economist, Volume 20.

ROI – GB RoRo

Tables 4 to 6 present RoRo volume on ROI – GB routes. ROI – GB represents ferry routes between Dublin Port/Rosslare-Europort, and Great Britain ports including Holyhead, Liverpool, Heysham, Pembroke and Fishguard.

Table 4:

Route	Q1 2023	Q1 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin - GB	179,495	176,036	-2%	-3,459
Rosslare - GB	14,936	15,402	3%	466
ROI - GB	**194,431**	**191,438**	**-2%**	**-2,993**

Table 5:

Route	Q2 2023	Q2 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin - GB	182,772	181,330	-1%	-1,442
Rosslare - GB	16,283	16,538	2%	255
ROI - GB	**199,055**	**197,868**	**-1%**	**-1,187**

Table 6:

Route	H1 2023	H1 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin - GB	362,267	357,366	-1%	-4,901
Rosslare - GB	31,219	31,940	2%	721
ROI - GB	**393,486**	**389,306**	**-1%**	**-4,180**

In the first half of 2024, RoRo traffic on ROI – GB routes fell by 1%, or 4,180 units. Between 2021 and 2023, the first years of the post-Brexit era, H1 RoRo traffic on these routes averaged approximately 385,000 units. In H1 2024, ROI – GB traffic is 1% above this benchmark, reflective of a post-Brexit market that is steady, with little momentum in either direction. For comparison, in H1 2019, before the end of the Brexit transition period, 500,000 units were carried on GB routes, which is 22% higher than the H1 2024 total.

In the first quarter of 2024, 191,438 units were carried on GB routes, which represented a 2% decline over 2023. Outside of Q1 2021, which was heavily disrupted by stockpiling after the Brexit transition period ended, this is the lowest Q1 total for ROI–GB routes of the post– Brexit era. The same is true for Q2 2024, where 197,868 units were handled, the lowest since Q2 2021, albeit marginally.

So far in 2024, only volumes on Dublin – GB routes have registered declines. Volumes on Rosslare-GB routes rose by 2% over the first six months of the year, adding 721 units compared to the same period in 2023. Between 2021 and 2024, volumes on Rosslare-GB routes in the first half of each year have been remarkably steady, averaging about 32,000 units. This is compared to over 50,000 units handled in the first half of 2019, i.e., pre- Brexit. On Dublin – GB routes, H1 volumes were 370,000 in 2022, 362,000 in 2023 and 357,000 in 2024. These gradual declines reflect the inflationary pressures evident throughout 2023 and 2024, rather than any diminishing trend on GB routes[2].

In terms of market shares, Dublin – GB traffic in H1 2024 continues to account for 92% of the ROI – GB market, as it did in the first half of 2022 and 2023. This is up from a 90% share held in 2019 and 2020. Overall, GB traffic in 2024 represents two thirds of all Irish RoRo traffic, which is unchanged from 2023.

[2] For more information on the impact of inflation on the Irish RoRo market, see The Irish Maritime Transport Economist, Vol 21

ROI – EU RoRo

Tables 7 to 9 present RoRo volume on ROI – EU routes. ROI – EU represents direct ferry services between Dublin, Cork, and Rosslare – Europort, and seven mainland European ports: Bilbao, Cherbourg, Dunkirk, Roscoff, Rotterdam, Santander, Zeebrugge.

Table 7:

Route	Q1 2023	Q1 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin - EU	58,030	60,292	4%	2,262
Rosslare - EU	35,631	34,111	-4%	-1,520
Cork - EU	1,313	2,068	58%	755
ROI - EU	**94,974**	**96,471**	**2%**	**1,497**

Table 8:

Route	Q2 2023	Q2 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin - EU	63,531	60,876	-4%	-2,655
Rosslare - EU	35,887	35,652	-1%	-235
Cork - EU	2,070	1,907	-8%	-163
ROI - EU	**101,488**	**98,435**	**-3%**	**-3,053**

Table 9:

Route	H1 2023	H1 2024	% Ch	Diff
	RoRo Units	**RoRo Units**	**%**	**RoRo Units**
Dublin - EU	121,561	121,168	0%	-393
Rosslare - EU	71,518	69,763	-2%	-1,755
Cork - EU	3,383	3,975	17%	592
ROI - EU	**196,462**	**194,906**	**-1%**	**-1,556**

In the first half of 2024, RoRo traffic on ROI – EU routes fell by 1%, or 1,556 units. Between 2021 and 2023, the first years of the post-Brexit era, H1 RoRo traffic on these routes averaged approximately 196,000 units. In H1 2024, ROI – GB traffic is 1% below this benchmark. Like ROI – GB routes, this is reflective of a post-Brexit market that is steady, with little momentum in either direction. For comparison, in H1 2019, before the end of the Brexit transition period, 93,000 units were carried on direct EU routes, which is less than half of the 2024 volume.

RoRo traffic on Rosslare – EU routes declined by 2% in the first half of 2024, equivalent to 1,755 fewer units. However, traffic on these routes remain high, even by post-Brexit comparisons. Rosslare – EU traffic in H1 2021 and 2022 averaged approximately 61,000 units. In 2023, this rose to 72,000 units, as new services were added.[3] At 69,763 units, traffic on Rosslare – EU routes remain significantly above pre-Brexit levels, where just over 10,000 units were handled in H1 2019.

Volumes on Dublin – EU routes are also holding firm in 2024, with traffic levels unchanged between H1 2023 and H1 2024. In Q2 2024 however, Dublin – EU traffic declined by 4%. This decline, which followed a 4% rise in the first Q1, was driven largely by a modal shift in the unitised traffic sector. New LoLo services were added to Dublin Port in the second quarter of 2024, with drove existing RoRo traffic on direct services to mainland European ports to shift towards these new LoLo services. Although both modes (RoRo & LoLo) have core competencies and competitive advantages in different areas, their cargos often fall under related categories i.e., manufactured goods. Both cargo modes are effective substitutes for one another, and operators in each market compete for similar business. As most LoLo services are direct to mainland EU ports, the substitutability with ROI – EU RoRo services is high. This is a common practice in the Irish unitised shipping market, and became more pronounced in the post-Brexit era as demand for direct services to mainland EU ports rose sharply.

[3] For more information on recent route changes in the Irish RoRo market, see The Irish Maritime Transport Economist, Vol 21

Lift-on / Lift-off (LoLo)

Tables 10 to 12 present the volumes of LoLo traffic handled at ports across the island of Ireland. They present total LoLo volume, measured in twenty-foot equivalent units (TEUs), and encompass both laden (full) and unladen (empty) LoLo volume.

Table 10:

Port	Q1 2023	Q1 2024	% Ch	Diff
	TEUs	**TEUs**	**%**	**TEUs**
Cork	63,774	66,904	5%	3,130
Dublin	191,286	204,001	7%	12,716
Waterford	8,077	7,796	-3%	-282
Republic of Ireland	**263,136**	**278,700**	**6%**	**15,564**
Belfast	51,009	55,919	10%	4,910
Warrenpoint	0	0		
Northern Ireland	**51,009**	**55,919**	**10%**	**4,910**
All-Island	**314,145**	**334,619**	**7%**	**20,474**

Table 11:

Port	Q2 2023	Q2 2024	% Ch	Diff
	TEUs	**TEUs**	**%**	**TEUs**
Cork	67,318	70,177	4%	2,859
Dublin	198,876	220,549	11%	21,673
Waterford	10,687	12,293	15%	1,606
Republic of Ireland	**276,881**	**303,019**	**9%**	**26,138**
Belfast	52,739	53,648	2%	909
Warrenpoint	0	0		
Northern Ireland	**52,739**	**53,648**	**2%**	**909**
All-Island	**329,620**	**356,667**	**8%**	**27,047**

Table 12:

Port	H1 2023	H1 2024	% Ch	Diff
	TEUs	**TEUs**	**%**	**TEUs**
Cork	131,092	137,081	5%	5,989
Dublin	390,162	424,550	9%	34,389
Waterford	18,764	20,088	7%	1,325
Republic of Ireland	**540,017**	**581,719**	**8%**	**41,702**
Belfast	103,748	109,567	6%	5,819
Warrenpoint	0	0		
Northern Ireland	**103,748**	**109,567**	**6%**	**5,819**
All-Island	**643,765**	**691,286**	**7%**	**47,521**

Republic of Ireland

The Lift-on/Lift-off (LoLo) container cargo market across Irish ports experienced notable shifts in volumes during the first half of 2024. This analysis details the performance across key ports—Cork, Dublin, Waterford, and Belfast—and examines the overall trends in LoLo traffic.

Q1 2024

In the first quarter of 2024, LoLo volumes exhibited an upward trend across most Irish ports. The total volume for the Republic of Ireland increased by 6% compared to Q1 2023, with an additional 15,564 TEUs handled. Cork recorded a 5% increase, adding 3,130 TEUs, while Dublin saw a more substantial rise of 7%, equivalent to an additional 12,716 TEUs. Waterford recorded a small decline, with a 3% drop, equating to a loss of 282 TEUs.

When compared to previous years, this is the third highest Q1 total for ROI LoLo traffic on record. Volumes were outpaced only by Q1 2021 and Q1 2022, when demand was strengthened by COVID-19 related factors. In those quarters, approximately 281,000 and 284,000 TEUs were handled, respectively.

Northern Ireland's performance mirrored this positive trend, with Belfast increasing its LoLo volumes by 10%, which translated to an additional 4,910 TEUs. Warrenpoint did not handle any LoLo traffic, as in the previous year. When compared to previous years, Q1 totals for NI ports have been higher in the past. The average Q1 volume between 2019 and 2023 was 4% higher than that of Q1 2024.

Overall, in Q1 2024, the All-Island LoLo volume grew by 7%, with a total increase of 20,474 TEUs, driven primarily by the strong performances in Dublin and Belfast.

Q2 2024

The second quarter of 2024 continued the upward trajectory observed in Q1. The Republic of Ireland's ports collectively handled 9% more LoLo cargo than in Q2 2023, adding 26,138 TEUs. Dublin led this growth with an 11% increase, representing an additional 21,673 TEUs. As highlighted above, this notable increase in Dublin was driven largely by a modal shift in the unitised traffic sector. New LoLo services were added to Dublin Port in the second quarter of 2024, which drove existing RoRo traffic on direct services to EU ports to shift towards these new LoLo services.

Cork and Waterford also posted gains of 4% and 15%, respectively, with Cork handling 2,859 more TEUs and Waterford adding 1,606 TEUs.

When compared to previous Q2's, 2024 matches up strongly. Just as in the first quarter, this is the third strongest Q2 total on record for ROI ports, beaten only by Q2 2021 and Q2 2022. In addition, it is only the third occasion where ROI LoLo traffic has surpassed 300,000 TEUs in the second quarter. In all, volumes in the ROI LoLo market are currently strong.

In Northern Ireland, Belfast's growth slowed to 2% in Q2, adding 909 TEUs. Between 2019 and 2023, the average Q2 total was roughly 58,000 TEUs, compared to 53,648 TEUs recorded in 2024. The loss of traffic through Warrenpoint has cost NI LoLo traffic approximately 5,000 TEUs per quarter.

Overall, the All-Island total for Q2 2024 rose by 8%, corresponding to an increase of 27,047 TEUs.

H1 2024

When considering the first half of 2024, LoLo traffic across all ports on the island of Ireland increased by 7%, with a total volume of 691,286 TEUs, which is 47,521 TEUs more than in H1 2023. The Republic of Ireland recorded an 8% rise in volumes, adding 41,702 TEUs for a total of 581,719 TEUs. Dublin was the standout performer, with a 9% increase (34,389 TEUs), reinforcing its dominant position in the market with a 73% share in H1. Cork also posted a solid performance with a 5% increase (5,989 TEUs), while Waterford saw a 7% rise (1,325 TEUs). In Northern Ireland, Belfast maintained a steady growth of 6%, equivalent to an additional 5,819 TEUs.

At 581,719 TEUs, ROI LoLo traffic in H1 2024 was better than 2023, but slightly below both 2021 and 2022. As highlighted in the IMDO's annual report, The Irish Maritime Transport Economist, the inflationary pressures in 2023 were significant, and suppressed port volume in the RoRo and LoLo sectors[4]. In the first half of 2024, Euro Area inflation has eased back to 2.5%, from an average of 6% throughout 2023[5]. In Northern Ireland, H1 volumes also improved over 2023, but remain below the strong performances recorded in 2021 and 2022, when a post-COVID bounce underpinned strong demand for all ports on the island of Ireland.

In summary, the first half of 2024 was marked by overall growth in LoLo volumes across Irish ports, with Dublin leading the charge. The performance of Cork and Waterford was also commendable, while Belfast maintained steady growth. This upward trend suggests a resilient and expanding LoLo market as inflationary pressures cool across the Euro Area.

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[4] For more information on the impact of inflation on the Irish LoLo market, see The Irish Maritime Transport Economist, Vol 21
[5] HICP - monthly data (annual rate of change) - Eurostat

Passenger Market

Ferry Passengers

Tables 13 to 15 illustrate the volume of RoRo ferry passengers that travelled through Irish and Northern Irish ports. In the Irish RoRo ferry market, many operators employ a RoPax model, meaning they carry not only freight traffic but passengers and passenger vehicles. In 2020 and 2021, no sector was more affected by COVID-19 restrictions than the market for tourist passengers. By 2023 however, the maritime passenger market has all but recovered, with volumes just slightly below 2019 levels

Table 13:

Passenger No.	Q1 2023	Q1 2024	% Ch	Diff
	No.	**No.**	**%**	**No.**
Cork	1,283	6,297	391%	5,014
Dublin	261,226	261,140	0%	-86
Rosslare-Europort	74,212	65,641	-12%	-8,571
Republic of Ireland	**336,721**	**333,078**	**-1%**	**-3,643**
Belfast	291,012	284,102	-2%	-6,910
Larne	70,618	78,706	11%	8,088
Northern Ireland	**361,630**	**362,808**	**0%**	**1,178**
All-Island	**698,351**	**695,886**	**0%**	**-2,465**

Table 14:

Passenger No.	Q2 2023	Q2 2024	% Ch	Diff
	No.	**No.**	**%**	**No.**
Cork	46,068	42,424	-8%	-3,644
Dublin	497,228	477,718	-4%	-19,510
Rosslare-Europort	176,954	168,620	-5%	-8,334
Republic of Ireland	**720,250**	**688,762**	**-4%**	**-31,488**
Belfast	469,376	462,364	-1%	-7,012
Larne	103,499	102,249	-1%	-1,250
Northern Ireland	**572,875**	**564,613**	**-1%**	**-8,262**
All-Island	**1,293,125**	**1,253,375**	**-3%**	**-39,750**

Table 15:

Passenger No.	H1 2023	H1 2024	% Ch	Diff
	No.	**No.**	**%**	**No.**
Cork	47,351	48,721	3%	1,370
Dublin	758,454	738,858	-3%	-19,596
Rosslare-Europort	251,166	234,261	-7%	-16,905
Republic of Ireland	**1,056,971**	**1,021,840**	**-3%**	**-35,131**
Belfast	760,388	746,466	-2%	-13,922
Larne	174,117	180,955	4%	6,838
Northern Ireland	**934,505**	**927,421**	**-1%**	**-7,084**
All-Island	**1,991,476**	**1,949,261**	**-2%**	**-42,215**

The passenger market across Irish and Northern Irish ports experienced mixed results during the first half of 2024, with fluctuations in ferry passenger numbers across different regions and ports.

Q1 2024

In the first quarter of 2024, ferry passenger volumes on the island of Ireland displayed minimal change overall, with a slight decrease of 0.4% compared to Q1 2023, equating to a reduction of 2,465 passengers. However, the performance varied significantly across different ports. Cork recorded a significant increase of 391%, adding 5,014 passengers. Elsewhere, Dublin and Rosslare-Europort experienced a decline, with Dublin remaining stable but down slightly by 86 passengers, and Rosslare-Europort posting a 12% drop, translating to 8,571 fewer passengers.

In Northern Ireland, the performance was mixed. Belfast saw a 2% decline, losing 6,910 passengers, while Larne bucked the trend with an 11% increase, adding 8,088 passengers. This contrasting performance resulted in a net zero change for Northern Ireland as a whole, with an increase of just 1,178 passengers.

Q2 2024

In the busy second quarter period of 2024, the passenger market softened further, with a 3% decrease in all-island passenger numbers compared to Q2 2023, equating to 39,750 fewer passengers. The Republic of Ireland saw a 4% decline overall, with Dublin, Rosslare-Europort, and Cork all reporting decreases. Dublin recorded 19,510 fewer passengers (a 4% decline), Rosslare-Europort saw a 5% reduction (8,334 passengers), and Cork experienced an 8% reduction (3,644 passengers).

Northern Ireland's ports also recorded relatively small declines, with Belfast and Larne both reporting minor decreases of 1%. Belfast catered for 7,012 fewer passengers, while Larne saw a reduction of 1,250 passengers. The cumulative effect resulted in a 1% overall decline for Northern Ireland, with 8,262 fewer passengers.

H1 2024

For the first half of 2024, the passenger market across the island of Ireland showed a 2% decrease in total passengers compared to H1 2023, with a loss of 42,215 passengers. The Republic of Ireland experienced a 3% decline, with 35,131 fewer passengers overall. Dublin was the most affected, with a 3% reduction, accounting for 19,596 fewer passengers, while Rosslare-Europort and Cork had 7% and 3% declines, respectively.

In Northern Ireland, the overall performance was slightly better but still saw a 1% decrease in total passenger numbers, with 7,084 fewer passengers. Belfast's decline of 2% (13,922 passengers) was offset slightly by Larne's 4% increase, adding 6,838 passengers.

Passenger Vehicles

The term 'passengers' refers to the volume of people travelling on RoRo ferries. The volume of passenger 'vehicles' is also an important consideration for shipping companies. Although many maritime passengers travel on foot, the majority travel on, or with, a domestic vehicle, such as a car, bus, trailer, caravan, etc. Such vehicles share RoRo capacity with freight traffic i.e., HGV's and unaccompanied containers. Monitoring the level of demand for these vehicles is important for tracking available shipping capacity at Irish ports, which can fluctuate throughout the year.

Tables 16 to 18 illustrate the volume of passenger vehicles - which includes cars, coaches, caravans, and similar tourist vehicles – that travelled through Irish and Northern Irish ports.

Table 16:

Passenger Vehicles[1]	Q1 2023	Q1 2024	% Ch	Diff
Port	**No.**	**No.**	**%**	**No.**
Cork	345	1,762	411%	1,417
Dublin	61,569	59,811	-3%	-1,758
Rosslare-Europort	30,847	27,538	-11%	-3,309
Republic of Ireland	**92,761**	**89,111**	**-4%**	**-3,650**
Belfast	73,428	72,819	-1%	-609
Larne	18,278	20,167	10%	1,889
Northern Ireland	**91,706**	**92,986**	**1%**	**1,280**
All-Island	**184,467**	**182,097**	**-1%**	**-2,370**

Table 17:

Passenger Vehicles[1]	Q2 2023	Q2 2024	% Ch	Diff
Port	**No.**	**No.**	**%**	**No.**
Cork	14,182	13,456	-5%	-726
Dublin	113,888	104,077	-9%	-9,811
Rosslare-Europort	68,048	66,815	-2%	-1,233
Republic of Ireland	**196,118**	**184,348**	**-6%**	**-11,770**
Belfast	113,924	107,793	-5%	-6,131
Larne	32,198	30,873	-4%	-1,325
Northern Ireland	**146,122**	**138,666**	**-5%**	**-7,456**
All-Island	**342,240**	**323,014**	**-6%**	**-19,226**

Table 18:

Passenger Vehicles[1]	H1 2023	H1 2024	% Ch	Diff
Port	**No.**	**No.**	**%**	**No.**
Cork	14,527	15,218	5%	691
Dublin	175,457	163,888	-7%	-11,569
Rosslare-Europort	98,895	94,353	-5%	-4,542
Republic of Ireland	**288,879**	**273,459**	**-5%**	**-15,420**
Belfast	187,352	180,612	-4%	-6,740
Larne	50,476	51,040	1%	564
Northern Ireland	**237,828**	**231,652**	**-3%**	**-6,176**
All-Island	**526,707**	**505,111**	**-4%**	**-21,596**

The passenger vehicle market across Irish ports also experienced varied performance during the first half of 2024, with some ports showing growth while others faced declines.

Q1 2024

In Q1 2024, the passenger vehicle market on the island of Ireland recorded a slight decline of 1%, with 2,370 fewer vehicles compared to Q1 2023. Cork recorded a significant increase of 411%, adding 1,417 vehicles, reflecting the rise in passenger numbers. In contrast, Dublin and Rosslare-Europort reported declines, with Dublin seeing a 3% drop (1,758 vehicles) and Rosslare-Europort experiencing an 11% decrease (3,309 vehicles).

Northern Ireland's performance was mixed. Belfast saw a marginal decrease of 1% (609 vehicles), while Larne experienced a 10% increase, adding 1,889 vehicles. As a result, Northern Ireland recorded a 1% increase in vehicle numbers.

Q2 2024

In Q2 2024, the passenger vehicle market faced greater challenges, with a 6% decrease in all-island vehicle numbers, corresponding to 19,226 fewer vehicles. The Republic of Ireland saw a 6% drop, with 11,770 fewer vehicles overall. Dublin recorded a 9% decline (9,811 vehicles), while both Cork and Rosslare-Europort also reported declines of 5% and 2%, respectively. Northern Ireland's ports also struggled, with Belfast seeing a 5% reduction (6,131 vehicles), and Larne experiencing a 4% decline (1,325 vehicles). Overall, Northern Ireland saw a 5% drop in passenger vehicle numbers.

H1 2024

In the first half of 2024, the passenger vehicle market across ports on the island of Ireland decreased by 4%, losing a total of 21,596 vehicles compared to H1 2023. The Republic of Ireland recorded a 5% decrease, with Dublin accounting for the largest share of this decline, losing 11,569 vehicles (a 7% drop). Rosslare-Europort and Cork also experienced declines of 5% and 3%, respectively.

In Northern Ireland, the overall performance was better but still saw a 3% decrease in vehicle numbers, with 6,176 fewer vehicles. Belfast's decline of 4% (6,740 vehicles) was slightly offset by Larne's modest 1% increase (564 vehicles).

Overall, the passenger vehicle market faced more significant challenges than the passenger market, with notable declines across several key ports, particularly in Dublin and Belfast, reflecting broader pressures on the RoRo passenger vehicle segment during the first half of 2024.