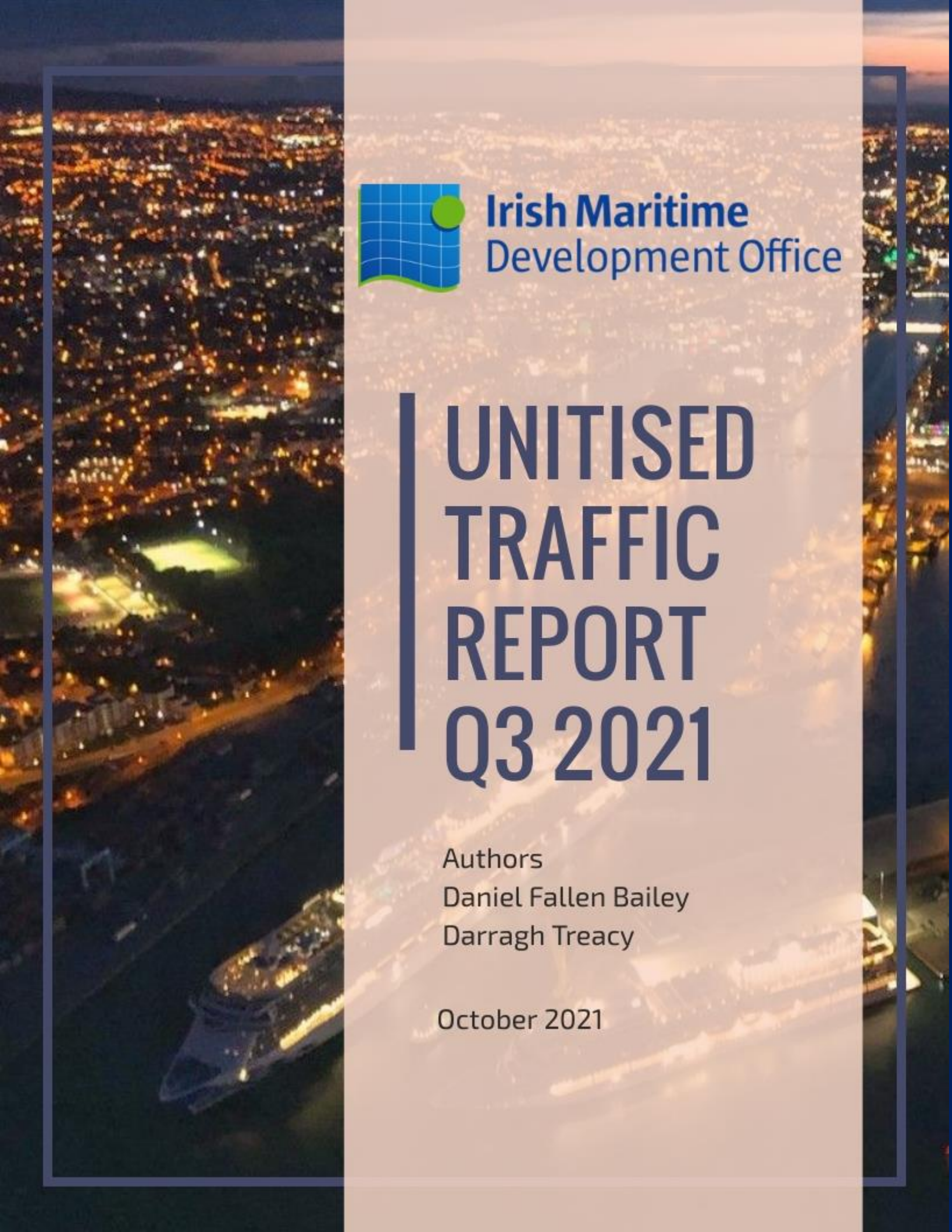

Irish Maritime
Development Office

UNITISED TRAFFIC REPORT Q3 2021

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October 2021

UNITISED TRAFFIC REPORT – Q3 2021

ABOUT THE IMDO

The Irish Maritime Development Office (IMDO) is Ireland's dedicated development, promotional and marketing agency for the shipping and shipping services sector. The IMDO is the Irish government agency which provides support to national and international maritime businesses in Ireland. It is the aim of the IMDO to be the focal point for maritime business 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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Contents

NOTES

1. **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.

2. **LoLo (Lift-on Lift-off):** LoLo involves a specific ship that engages in the transportation of containerised freight, that is loaded and unloaded by ship-to-shore cranes.

3. **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.

4. **RoPax:** The sector that uses vessels capable of carrying passengers, passenger vehicles, and RoRo freight

5. **Ireland / ROI:** Republic of Ireland

6. **NI:** Northern Ireland

7. **GB:** Great Britain

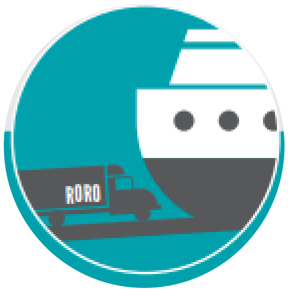
8. **ROI – EU:** RoRo services operating between Dublin, Cork or Rosslare Europort, and a mainland European Port that is inside the European Union

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

10. **Data Revisions**: In this, the latest quarterly unitised traffic report, the IMDO has made revisions to some maritime freight data. This is due to new data being received from a combination of port authorities and shipping operators. This report represents the most up to date and detailed report of maritime freight data in Ireland. For an overview of 2021 data, see **Appendix.**

11. **Data requests**: Please contact the IMDO team.

UNITISED TRAFFIC GROWTH IN Q3 2021 (Vs Q3 2020)



ROI RORO: -4%

NI RORO: +9%

ROI LOLO: +10%

NI LOLO: +25%

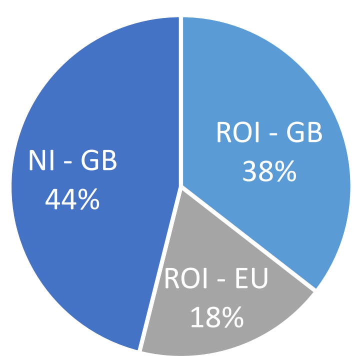
ROI Tourist Passengers: +86%

NI Tourist Passengers: +104%

ROI – EU RoRo: +98%

ROI – GB RoRo: -23%

All Island RoRo Share



Unitised Traffic in Q3 2021, Executive Summary[1]

Roll/on – Roll/off (RoRo):

In Q3 2021, RoRo volumes through ports in the Republic of Ireland (ROI) were consistent with those in Q3 2019[2]. Between July and September, **297,920** RoRo units were handled at Dublin, Cork and Rosslare Europort, just 0.02% more than the same period in 2019. However, the configuration of RoRo traffic in terms of route choice and shipping mode has been significantly altered compared to 2019. The following is a summary of the most pronounced trends that have emerged in the RoRo freight market:

71% of all ROI RoRo traffic is now unaccompanied, compared to 64% in Q3 2019. This is the highest share held by unaccompanied traffic on record.

One third of all RoRo traffic in the Republic of Ireland now operates on direct routes to ports in the European Union, up from a 16% share held throughout 2019. In the first nine months of 2021, ROI – EU traffic is already 52% above its annual total for all of 2019. Q3 2021 was one the second busiest on record for these direct routes, surpassed only by Q2 2021.

In terms of capacity, Irish importers and exporters have benefitted from a significant increase in the choice of direct EU services in 2021. After responding to a surge in 'direct demand', there are now 13 different direct EU RoRo services available to Irish businesses, compared to 6 in 2019.[3]

ROI – GB RoRo traffic has declined significantly since January 2021. Volumes in Q1 2021 were distorted by a pre-Brexit stockpile, combined with strict COVID-19 restrictions in January and February. Q2 & Q3 2021 therefore provide a more reliable insight into current demand on ROI – GB routes. In Q3 2021, ROI – GB volumes fell by 20% compared to Q3 2019. The volume of traffic recorded in Q2 & Q3 2021 is the lowest since early 2015. In all, for the first nine months of the year, GB traffic has declined by 25% compared to 2019. ROI – GB traffic now accounts 67% of ROI volumes, compared to 84% throughout 2019.

In Northern Ireland (NI), RoRo traffic has reached unprecedented levels. Q3 2021 was the second busiest quarter on record, surpassed only by Q2 2021. In Q3, NI RoRo traffic rose by 11% when compared Q3 2019. All three Northern Ireland RoRo ports, Belfast and Warrenpoint & Larne, have recorded significant growth in RoRo traffic in 2021.

Underpinning all of these trends are the new customs and trading arrangements between Ireland and the UK that came into force on January 1st 2021 after Great Britain's withdrawal from the European Union. Brexit has had a significant effect on RoRo traffic on the island of Ireland. The most prominent impact has been on the use of the UK Landbridge, 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. Demand for the Landbridge has fallen considerably, and this has driven the simultaneous decline in ROI – GB traffic and increase in direct ROI – EU traffic.

[1] Revisions have been made to the data presented in the IMDO's Q3 Unitised Traffic Report. See NOTE No. 10, pg 3.

[2] Q3 2020 encompassed a period of resurgent demand after the initial wave of the COVID-19 pandemic in Ireland. 2020 was a year of significant fluctuation in freight volume, and Q3 2020 represents an uncharacteristically high volume of RoRo traffic for Irish ports. 2019 is a more reliable benchmark as it represents the highest annual volume of RoRo traffic recorded through ROI ports.

[3] The RoRo market for both EU and GB services remains extremely competitive and dynamic. As a result, capacity, route choice and frequency have changed frequently as shipping operators adapt to new demand patterns.

In addition to the Landbridge issue, some RoRo traffic has also 'transferred' away from ROI - GB routes and towards NI – GB routes. RoRo services at ROI ports have historically been utilised by many NI hauliers wishing to access markets in the midlands and southeast of England. From early 2021, it was clear that haulage companies based in Northern Ireland had transferred some traffic away from RoRo services in ROI in order to avoid the new customs requirements involved between Ireland and UK ports.

As detailed in **Section 3 (iii),** the IMDO estimates that of the displaced ROI – GB RoRo traffic, approximately 80% has moved to ROI – EU services, while the remaining 20% has moved to NI – GB services.

Lift/on – Lift/off (LoLo):

Like RoRo traffic on direct EU routes, LoLo volumes have also reached unprecedented levels in 2021. LoLo traffic through ROI ports set a record in Q2 2021, surpassing 300,000 TEUs for the first time. In Q3 2021, volumes are slightly below this level, at 299,765 TEUs, but remain significantly above the average for the past five years. In Q3 2021, ROI LoLo traffic grew by 13% compared to Q3 2019.

Beginning midway through 2020, LoLo volumes have surged, and have consistently held onto gains made each quarter. Quarterly TEU volumes are now higher than the peaks recorded before the financial crash in 2008.

The vast majority of LoLo services on the island of Ireland are direct to continental EU ports. As a result, many of the factors that have driven a surge in ROI – EU RoRo traffic are applicable to the Irish LoLo market. LoLo volumes have benefitted greatly from the demand from Irish importers and exports to access EU markets directly, without the need to adhere to customs requirements at UK ports since Brexit.

Overall, in the last nine months, the substitutability between accompanied RoRo, unaccompanied RoRo and LoLo services has become more pronounced, with increased competition and dynamic capacity evident in each market.

Passengers

As highlighted in the IMDO's Q1 & Q2 reports, no Irish maritime market segment has been more severely disrupted by the COVID-19 pandemic and its accompanying restrictions than the market for passengers.

Following the introduction of the EU Digital COVID Certificate in July 2021, the volume of passengers on maritime services in the Republic of Ireland rose significantly. Tourism / passenger numbers in the Republic of Ireland increased by 86% in Q3 2021 when compared to Q3 2020. In the summer of 2020, many international travel restrictions were still in place, both in the Republic of Ireland and across Europe. When compared to Q3 2019, passenger numbers in Q3 2021 declined by 56%. Since the initial wave of the pandemic in Ireland, this is the closest the industry has come to returning to 2019 passenger levels. In Northern Ireland, passenger numbers in Q3 2021 have returned to pre-pandemic levels.

1. All Island Roll-on / Roll-off (RoRo) Market

(i) Q3 2021

Table 1 shows that RoRo traffic through ports in the Republic of Ireland (ROI) decreased by 4% in Q3 2021, or by 10,811 units, when compared to Q3 2020. Caution should be exercised when interpreting these volumes, as Q3 2020 encompassed a period of resurgent demand after the initial wave of the COVID-19 pandemic in Ireland. The volume of RoRo traffic in Q3 2020 was 8% above average for a given quarter between 2015 and 2020, and the second largest quarterly volume on record. 2020 was a year of significant fluctuation in freight volume, and Q3 2020 represents an uncharacteristically high volume of RoRo traffic for Irish ports.

For this reason, in Table 1, RoRo volumes recorded in Q3 2021 are also compared to Q3 2019. 2019 is a reliable benchmark as it represents the highest annual volume of RoRo traffic recorded through ROI ports. When compared to Q3 2019, volumes in Q3 2021 recorded 0% overall change. Rosslare Europort and the Port of Cork recorded significant growth compared to 2019, with volumes increasing by 46% and 20% respectively. Dublin Port RoRo volumes declined by 5%.

RoRo traffic in Northern Ireland (NI) has continued its trend of unprecedented volumes. In Q3 2021, NI traffic recorded its second highest quarterly volume on record, surpassed only by Q2 2021. NI RoRo traffic grew by 9% compared to Q3 2020, and by 11% compared to 2019 (See Table 1).

All three RoRo ports in Northern Ireland recorded growth in traffic compared to Q3 2019. Larne recorded the largest increase of 21%. RoRo traffic through Warrenpoint grew by 4% while traffic through Belfast increased by 9%. As outlined in the IMDO's Q2 2021 report, NI volumes have recorded significant traffic growth in 2021 despite the imposition of severe COVID-19 restrictions on economic activity in the UK and Ireland in the early months of the year. As was the case in the first 6 months of 2021, the increase in NI volumes is better explained as a response to the new trading relationship between ROI, NI and GB. More detail on this issue is explained in **Section 3 (ii).**

Table 1: All - Island RoRo Units, Accompanied & Unaccompanied, Q3 2019 – Q3 2021

	Q3 2019	Q3 2020	Q3 2021	Growth Vs 2020	Diff Vs 2020	Growth Vs 2019
	RoRo Units	RoRo Units	RoRo Units	(%)	RoRo Units	(%)
Cork	1,576	427	1,889	342%	1,462	20%
Dublin	265,468	276,265	251,056	-9%	-25,209	-5%
Rosslare	30,813	32,038	44,975	40%	12,937	46%
ROI	**297,857**	**308,730**	**297,920**	**-4%**	**-10,811**	**0.0%**
NI	214,165	217,968	236,961	9%	18,993	11%
All - Island	**512,022**	**526,698**	**534,881**	**2%**	**8,183**	**4%**

(ii) Q1 – Q3 2021 (Jan – Sep)

Republic of Ireland

Table 2 presents the total throughput of RoRo traffic for the first nine months of the year. So far in 2021, Irish ports have handled an almost identical volume of RoRo traffic when compared to 2020. However, when compared to 2019, RoRo volumes have declined by 5% for the first nine months.

Compared to 2019, only Rosslare Europort recorded positive growth. RoRo traffic at Rosslare increased by 47% for the first nine months of the year. RoRo traffic fell by 3% in Cork and by 11% in Dublin Port, when compared to 2019. For Dublin Port, 75% of this decline is attributable to Q1 2021, wherein volumes were negatively affected by a large pre-Brexit stockpile of goods in late 2020, as well as severe COVID-19 restrictions on economic activity[4].

As the impact of the pre-Brexit stockpile diminished towards the end of Q1, and as sectors of the Irish economy began to reopen, RoRo traffic rebounded strongly in Q2 at all three ports. ROI volumes in Q2 and Q3 2021 are in line with those of 2019.

Northern Ireland

As detailed in **Section 1 (i),** NI RoRo volumes have reached unprecedented highs in 2021. For the first nine months of the year, NI volumes have grown by 17% compared to 2020, and by 9% when compared to 2019. At just under 700,000 RoRo units, this is the largest volume of RoRo traffic for any 9-month period on record.

All three of Northern Ireland's RoRo ports have recorded significant growth. When compared to 2020, Belfast traffic increased by 16%, Larne by 18% and Warrenpoint by 20%. When compared to 2019, all three ports grew by 9% each between January and September. If the volume of traffic in Q4 is similarly high, NI traffic will have recorded an increase of approximately 10% versus 2019.

Table 2: All - Island RoRo Units, Accompanied & Unaccompanied, Q1 – Q3 2019, 2020 & 2021

	Q1 - Q3 2019	Q1 - Q3 2020	Q1 - Q3 2021	Growth Vs 2020	Diff Vs 2020	Growth Vs 2019
	RoRo Units	RoRo Units	RoRo Units	(%)	RoRo Units	(%)
Cork	4,334	1,328	4,221	218%	2,893	-3%
Dublin	794,158	757,018	706,521	-7%	-50,497	-11%
Rosslare	92,902	88,127	136,899	55%	48,772	47%
ROI	**891,394**	**846,473**	**847,641**	**0%**	**1,168**	**-5%**
NI	639,012	595,375	697,952	17%	102,577	9%
All - Island	**1,530,406**	**1,441,848**	**1,545,593**	**7%**	**103,745**	**1%**

[4] For more detail on this issue, see Section 2.1 (pg 9) of the IMDO's Q1 Unitised Traffic 2021 report, found here.

2. Post-Brexit Traffic Patterns: EU Vs GB RoRo Traffic

(i) GB RoRo Traffic

Table 3 details the volume of RoRo units carried on ROI – GB and NI – GB services between Q3 2019 and Q3 2021. Table 4 presents the same between Q1 – Q3 2019 and Q1 – Q3 2021.

Table 3: All - Island RoRo Units, GB Routes, Q3 2019 – Q3 2021

		Dublin - GB	Rosslare - GB	ROI - GB	NI - GB
Total Q3	Q3 2019	225,394	25,790	251,184	214,165
	Q3 2020	234,160	25,328	259,488	217,968
	Q3 2021	183,731	16,872	200,603	236,961
	Growth Vs 2020 (%)	*-22%*	*-33%*	*-23%*	*9%*
	Growth Vs 2019 (%)	*-18%*	*-35%*	*-20%*	*11%*

Table 4: All - Island RoRo Units, GB Routes, Q1 – Q3 2019, 2020 & 2021

		Dublin - GB	Rosslare - GB	ROI - GB	NI - GB
Total YTD	Q1 - Q3 2019	674,442	77,192	751,634	639,012
	Q1 - Q3 2020	634,866	69,015	703,881	595,375
	Q1 - Q3 2021	514,336	47,968	562,304	697,952
	Growth Vs 2020 (%)	*-19%*	*-30%*	*-20%*	*17%*
	Growth Vs 2019 (%)	*-24%*	*-38%*	*-25%*	*9%*

Beginning in January 2021, the volume of ROI – GB RoRo traffic has declined significantly. In the first quarter of 2021, 162,887 units were handled on these routes, the lowest volume ever recorded by the IMDO. The predominant driver of this Q1 decline was the pre-Brexit stockpile in late 2020. The impact of this stockpile, coupled with strict COVID-19 restrictions between January and March, was so significant that the decline in ROI – GB traffic as a result of Brexit could not be accurately isolated.

As the stockpile effect passed, and as parts of the Irish economy re-opened, ROI – GB traffic rebounded significantly in Q2 2021, with volumes increasing by 30% on a seasonally adjusted basis between Q1 & Q2.

Volumes in Q3 2021 are also above that of Q2. ROI – GB traffic grew by 1% on a seasonally adjusted basis between Q2 and Q3 2021. As shown in Table 3, ROI – GB traffic in Q3 remains 23% below Q3 2020, a decline of 58,885 units. ROI - GB traffic fell by 20% when compared to Q3 2019 (See Table 3).

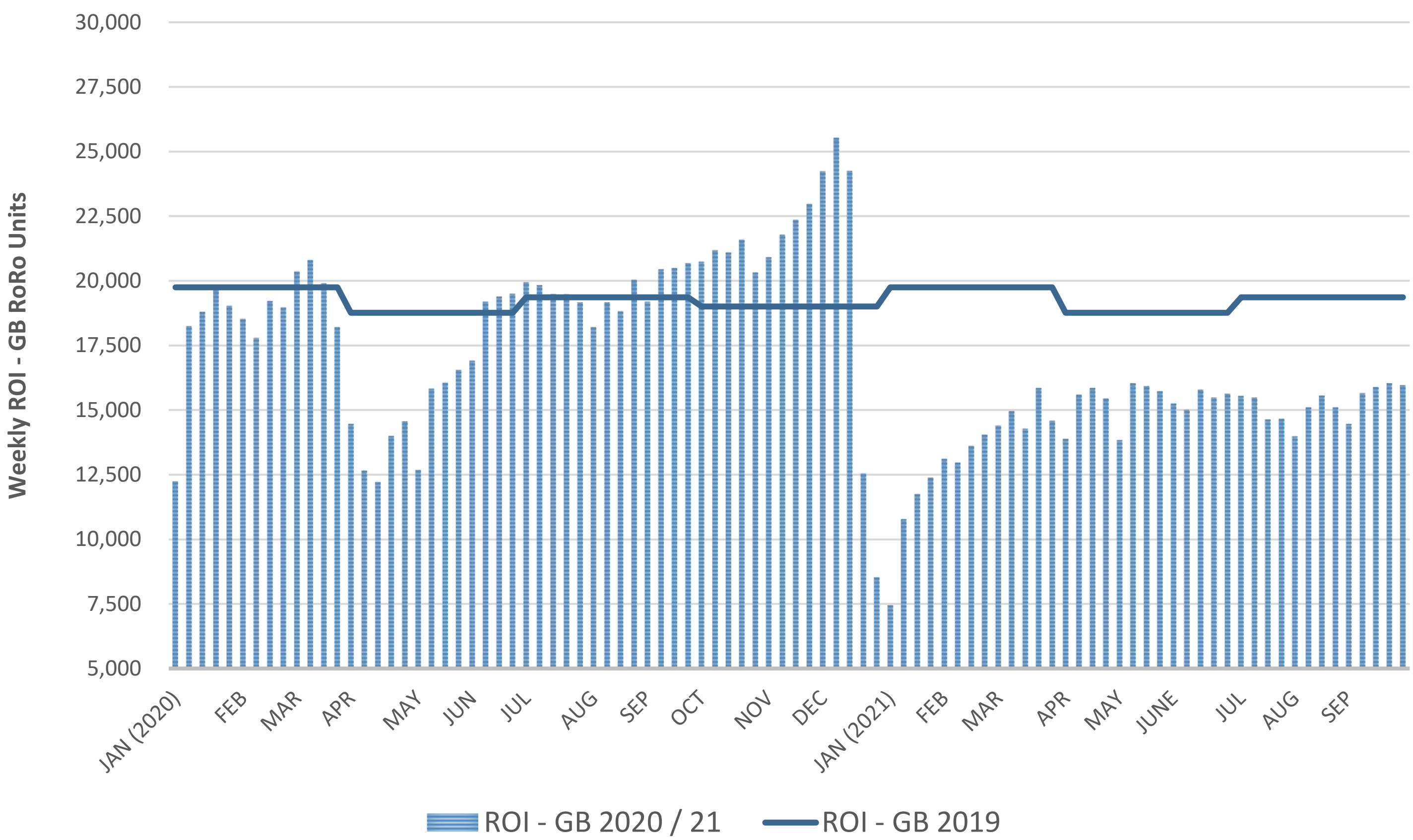
It is clear that the new trading arrangements between Ireland and the UK have had a significant and negative effect upon RoRo freight traffic between the two countries, and that this has amounted to a decline of at least 20% for the first nine months of 2021 (See Table 4).

Figure 1 illustrates the weekly trajectory of ROI – GB traffic beginning in January 2020, compiled by the IMDO using data from ports and shipping operators. The volumes in 2020 & 2021 are set against a 2019 benchmark.

Within Figure 1, the low points of the initial wave of COVID-19 in Ireland can be seen between March & April 2020, as well as the surge in ROI – GB traffic in the months leading up to Britain's formal withdrawal from the European Single Market in late 2020. In 2021, the impact of this pre-Brexit stockpiling is evident in the first quarter of the year.

Beginning in April 2021, and after the stockpiling phenomenon had passed, ROI – GB RoRo traffic has become relatively stable, averaging approximately 15,000 RoRo units per week. In 2019, the average weekly volume was approximately 19,000 RoRo units per week. Since April 2021, there has been no significant upward movement in ROI – GB RoRo traffic. As a result, the volume of traffic employing the use of the UK Landbridge remains unchanged from Q2 2021.

Figure 1: Weekly RoRo Traffic, ROI – GB services, 2020/2021 Vs 2019 Benchmark



As highlighted in the IMDO's Q2 traffic report, the decline in ROI – GB traffic has not been equally shared between Ireland's two GB ports; Dublin & Rosslare Europort. The fall in ROI – GB traffic has been steeper at Rosslare, in proportional terms. At Rosslare Europort, GB traffic declined by 33% when compared to Q3 2020, and by 35% when compared to 2019. At Dublin Port, the decline in GB traffic was 22% versus Q3 2020, and 18% versus 2019 (See Table 3).

The decrease in Rosslare – GB traffic also represents approximately 15% of the overall decline in GB volume, despite accounting for a 10% share of this traffic in recent years. The decline in ROI – GB traffic since January 2021 has therefore been shared disproportionately between Dublin Port and Rosslare Europort. This trend has not changed significantly between Q2 and Q3 2021.

Overall, ROI – GB traffic averaged roughly 250,000 units each quarter in 2019 and 2020. In Q2 and Q3, ROI – GB traffic has averaged just under 200,000 units. ROI – GB traffic has therefore declined by approximately one fifth since the imposition of new trading arrangements between the UK and the EU on January 1st, and this amounts to approximately 50,000 RoRo units per quarter.

The IMDO consults regularly with industry stakeholders. According to such groups, the most significant factor behind the decline in ROI – GB traffic has been concerns of delays and disruption on the UK Landbridge[5] as a result of the EU-UK Trade and Cooperation Agreement. It is clear that in the first nine months of 2021, many more importers and exporters have chosen alternative logistical arrangements, which includes the use of direct EU shipping services, as a means to access EU markets. This issue is explained in greater detail in the following sections.

(ii) EU RoRo Traffic

Table 5 details the volume of RoRo units carried on ROI – EU services between Q3 2019 and Q3 2021.Table 6 presents the same between Q1 – Q3 2019 and Q1 – Q3 2021.

Table 5: All - Island RoRo Units, EU Routes, Q3 2019 – Q3 2021

		Cork - EU	Dublin - EU	Rosslare - EU	ROI - EU
Total Q3	Q3 2019	1,576	40,074	5,023	46,673
	Q3 2020	427	42,105	6,710	49,242
	Q3 2021	1,889	67,325	28,103	97,317
	Growth Vs 2020 (%)	*342%*	*60%*	*319%*	*98%*
	Growth Vs 2019 (%)	*20%*	*68%*	*459%*	*109%*

Table 6: All - Island RoRo Units, EU Routes, Q1 – Q3 2019, 2020 & 2021

		Cork - EU	Dublin - EU	Rosslare - EU	ROI - EU
Total YTD	Q1 - Q3 2019	4,334	119,716	15,710	139,760
	Q1 - Q3 2020	1,328	122,152	19,113	142,592
	Q1 - Q3 2021	4,221	192,185	88,931	285,337
	Growth Vs 2020 (%)	*218%*	*57%*	*365%*	*100%*
	Growth Vs 2019 (%)	*-3%*	*61%*	*466%*	*104%*

Beginning in January 2021, a clear trend has emerged of surging ROI – EU RoRo traffic. The volume of direct EU traffic rose to unprecedented levels in Q1 2021, to just under 89,000 units. In Q2 2021, that momentum continued, with EU volumes rising by a further 19% between Q1 & Q2 on a seasonally adjusted basis, reaching 99,000 units. In Q3, EU RoRo traffic has slowed slightly, decreasing by 6% between Q2 and Q3 on a seasonally adjusted basis. However, at 97,317 RoRo units, ROI – EU traffic in Q3 2021 remains almost twice that of quarterly volumes recorded in 2019 and 2020.

[5] 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.

As shown in Table 6, ROI – EU volumes have doubled when compared to either 2019 or 2020. At 285,337 units, ROI – EU RoRo traffic is currently 52% above the entire volume of EU traffic recorded in 2019. For each quarter of 2021, EU traffic is consistently twice the amount recorded in either 2019 or 2020, meaning this trend has been consistent throughout the year. Overall, the trend towards direct ROI – EU routes that emerged in early 2021 has continued for the first three quarters of the year, and the pace of this growth slowed marginally between Q2 and Q3 2021.

This surge in demand for direct EU RoRo services has been met due to an unprecedented market response from shipping companies to provide new RoRo and LoLo services. In the RoRo sector, all four incumbent shipping operators offering ROI – EU services (Stena Line, Irish Ferries, CLdN and Brittany Ferries) announced additional capacity on direct services for 2021. Destinations included Zeebrugge, Cherbourg, Bilbao and Santander.

In addition, further capacity was added on direct EU RoRo services in recent weeks. Brittany Ferries will operate a service between Rosslare Europort and Le Harve, beginning in November 2021. The combined effect of these actions throughout 2021 has been to double available capacity on direct RoRo services to continental Europe. There are currently six shipping operators offering thirteen different direct RoRo services to ports in mainland Europe[6].

In terms of where this increased direct traffic has been handled, Rosslare Europort has captured more of the increase in ROI – EU RoRo traffic, in proportional terms. Of the 142,000 *additional* RoRo units carried in the first nine months of 2021, approximately 49% travelled through Rosslare Europort, while another 49% travelled through Dublin Port. A further 2% was handled at the Port of Cork.

Since 2015, Rosslare Europort has represented approximately 14% of all ROI – EU traffic, meaning it captured a disproportionately high amount of the additional demand for direct EU services in 2021. Since 2015, Dublin Port represented approximately 85% of all EU traffic, but captured half of the additional demand for EU services in 2021.

As a result, Rosslare now accounts for 31% of all ROI – EU RoRo traffic, more than double its previous share. The Port of Cork now holds a 1.5% share of EU traffic, an increase on the 1% held since 2015.

It should also be noted that all direct EU services, both RoRo and LoLo, have recorded unprecedented increases in volume, regardless of destination or the port in which it was handled. It is clear in the first nine months since Brexit, the configuration of Irish RoRo traffic has been significantly altered, and this has remained consistent in each quarter of 2021.

As for the drivers of this unprecedented increase in volumes of direct EU traffic, the most significant has been a transfer away from the UK Landbridge. The vast majority of this new continental traffic had been employing the use of the UK Landbridge prior to January 2021.

RoRo traffic that makes use of the UK Landbridge represents trade between Ireland and the European Union that is captured within ROI – GB freight statistics. Importantly, increases in ROI – EU traffic do not automatically imply greater Ireland – EU trade, but rather, a reconfiguration of the supply chains of Ireland's importers and exporters.

Competition between shipping companies operating on direct EU services, and those operating on the UK Landbridge, has greatly increased since the introduction of the Brexit trading arrangements. The IMDO will continue to monitor these trends closely.

[6] Schedules and service offerings for direct EU RoRo services have frequently been altered throughout 2021. The above statement is true at the time of publication.

3. Analysis of RoRo Market Shares

(i) ROI Port Shares

Figure 2 below illustrates the percentage share of ROI RoRo traffic held by Dublin Port and Rosslare Europort between 2007 and 2021. As evident in Figure 2, Dublin Port's share rose steadily from 81% to 90% during that time. Rosslare Europort's share of RoRo traffic fell from 19% to 10% during the same period.

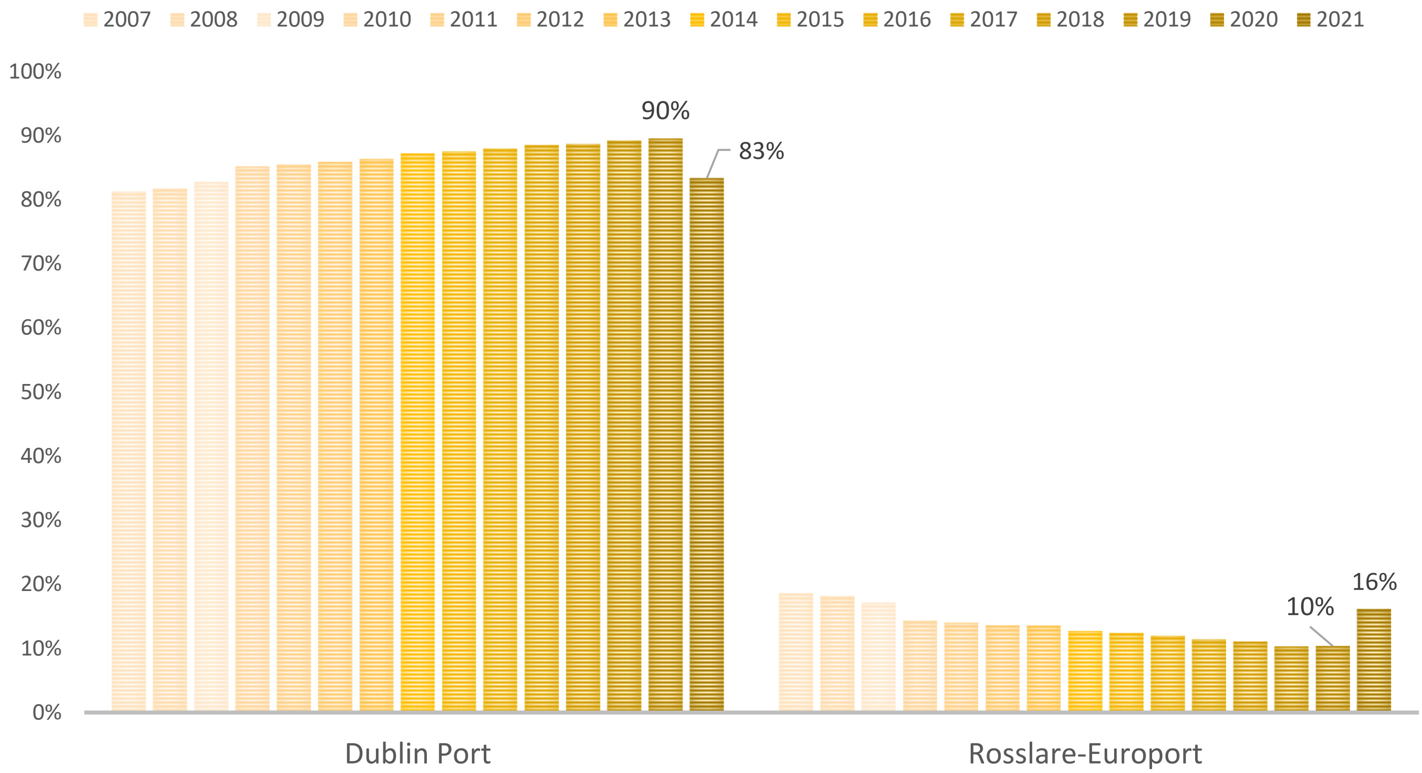
As highlighted in **Section 2 (ii)**, in the first nine months of the new EU – UK trading arrangements, the configuration of Irish RoRo traffic has been significantly altered. Figure 2 illustrates the impact of this reconfiguration on RoRo traffic port shares. Dublin Port now holds an 83% share of RoRo traffic, while Rosslare Europort holds a 16% share. The Port of Cork holds a 0.5% share in 2021, a slight increase on the 0.3% held for much of the last decade.

As highlighted in **Section 2**, Rosslare Europort has captured a greater share of the increase in ROI – EU traffic. In volume terms, Rosslare's EU traffic in 2021 has risen by roughly 70,000 units compared to 2020, while GB traffic through the port declined by 21,000 units (see Tables 4 & 6). The increase in EU traffic at Rosslare Europort has therefore outweighed the decline in GB traffic. In all, just under 50,000 *additional* RoRo units have been handled at Rosslare in 2021, and this has driven its share of ROI traffic from 10% to 16%.

In Dublin Port, the opposite trend is evident. In volume terms, Dublin Port's EU traffic has risen by 70,000 units so far in 2021, while GB traffic through the port has fallen by 120,000 RoRo units. This decline of approximately 50,000 units has led to Dublin's share of RoRo traffic falling from 90% to 83% in 2021.

As for The Port of Cork, the increased demand for ROI – EU services has benefited traffic volumes, as there are currently no GB RoRo services at the port. RoRo volumes so far in 2021 are currently operating at 2019 levels.

Figure 2: Share of ROI RoRo Traffic[7], Dublin Port & Rosslare Europort, 2007 - 2021

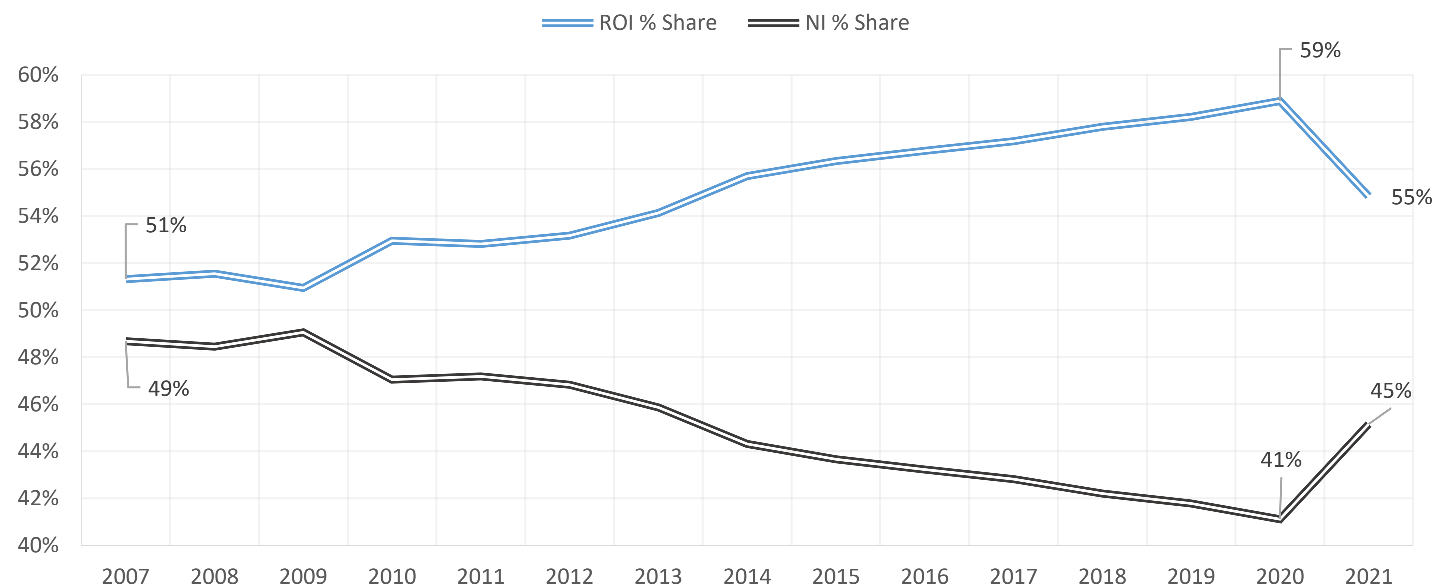


[7] Excluding Northern Ireland RoRo traffic

(ii) ROI / NI Shares

The significant increase in RoRo volume through Northern Irish ports has altered market shares for RoRo traffic on the island of Ireland. Figure 3 illustrates the annual share of all island RoRo traffic when ROI and NI traffic are compared. Between 2007 and 2020, the share of ROI RoRo traffic rose steadily from 51% to 59%. During the same period, the share of NI traffic declined steadily from 49% to 41%. In the first nine months of 2021, the share of NI traffic has moved to 45%, while the share of ROI traffic is now 55%.

Figure 3: Share of All Island RoRo Traffic, 2010 – 2021



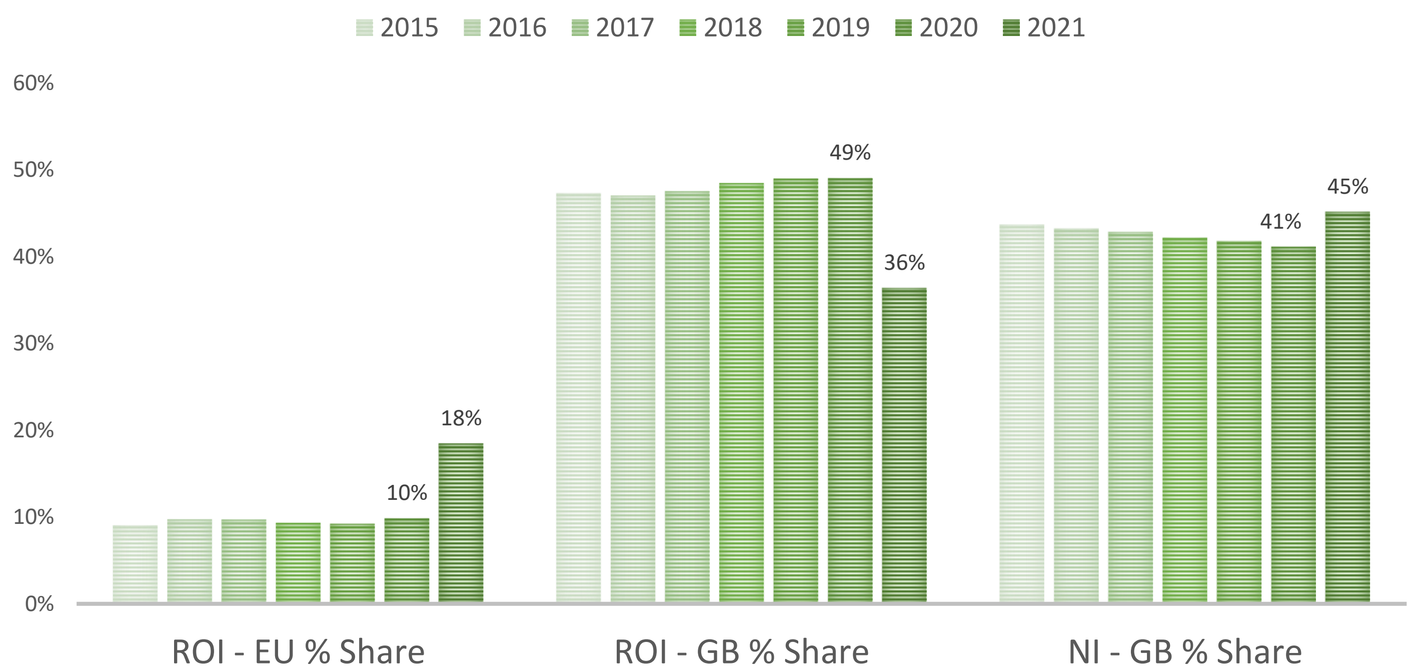
The issue of ROI RoRo traffic 'transferring' to Northern Irish ports was outlined in the IMDO's Q1 2021 Unitised Traffic Report. In this report, it was highlighted that many Northern Irish hauliers have historically made significant use of the frequent RoRo services from ports in the Republic of Ireland, particularly Dublin Port. From early 2021, it was clear that haulage companies based in Northern Ireland had transferred significant volumes of traffic away from routes in the Republic of Ireland and back to Northern Ireland. In Q2 & Q3 2021, this trend has continued.

The return of Northern Irish traffic from ports in the Republic of Ireland drove the majority of the increase recorded on NI routes (See Table 2). This trend also partly explains the decline in Dublin Port's GB traffic in 2021. Before the new UK-EU trading arrangements were put in place, Dublin Port had been the port of choice for many NI hauliers wishing to access markets in the midlands and southeast of England.

(iii) Route Shares

RoRo traffic on the island of Ireland can be divided into three main routes; ROI – GB, NI – GB and ROI – EU.[8] Figure 4 presents the annual share for each route between 2015 and 2021.

Figure 4: All Island RoRo Traffic, Route Shares, 2015 - 2021



The impact of the Brexit trading arrangements is evident in Figure 4, as the 2021 breakdown of all island shares has been significantly altered. The most significant change has come on ROI – GB routes, the share of which has fallen by 13% compared to 2020. This has coincided with significant increases in RoRo traffic on both ROI – EU and NI – GB routes.

In the third quarter of 2021, 4% more RoRo traffic was handled on the island of Ireland compared to the same period in 2019 (see Table 1). This indicates that there has been no loss in RoRo trade to ports on the island of Ireland this quarter. The shifts in route shares illustrated in Figure 4 are more indicative therefore, of the reconfiguration that has occurred in RoRo traffic resulting from the new Brexit trading arrangements.

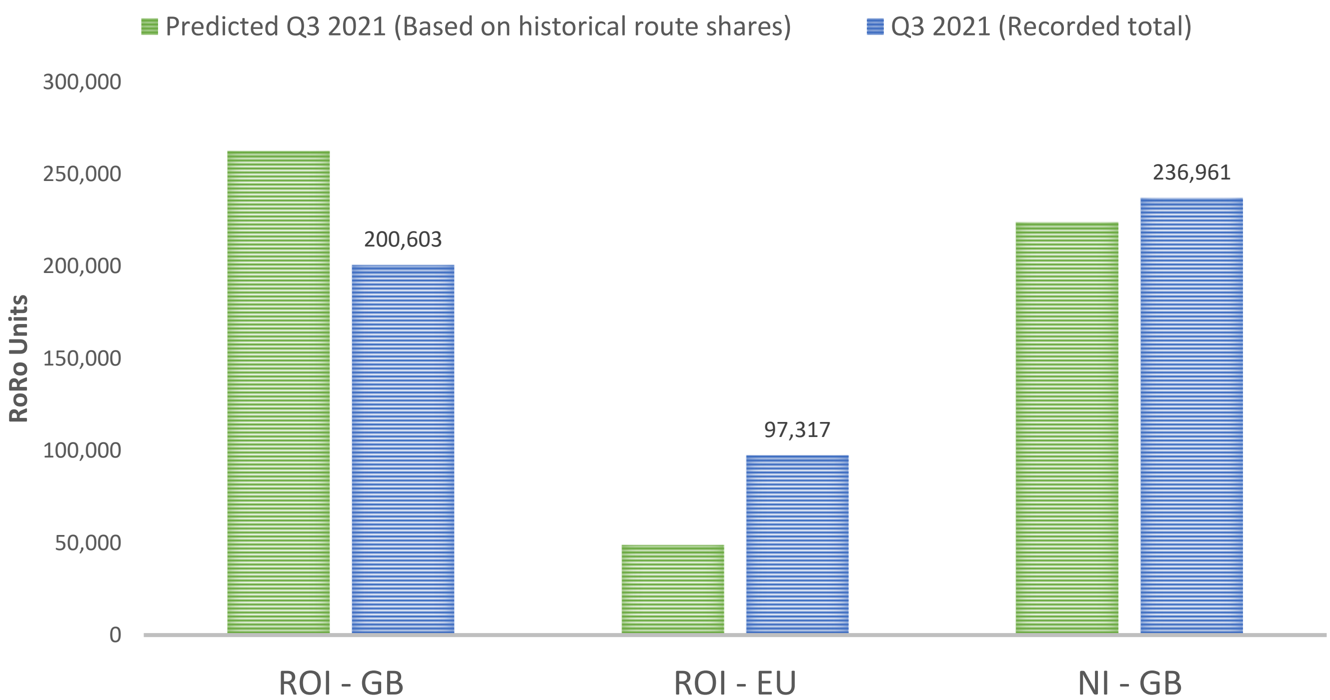
A more detailed explanation is that importers and exporters have continued to trade in similar quantities, but have reorganised supply chains away from ROI – GB RoRo services. The reason for this will be specific to the individual importer or exporter, however, underpinning these decisions are the customs requirements and associated administrative costs that have been in place between Ireland and the UK from January 2021.

[8] ROI – EU refers to any RoRo services operating between Dublin, Cork or Rosslare Europort, and a continental European Port that is within the European Union.

As ROI – GB RoRo traffic has been redistributed between ROI – EU and NI – GB routes, it is important to quantify the amount captured by each of the latter two routes. Figure 5 below provides an approximation of such quantities.

In Q3 2021, 534,881 RoRo units were handled at ports on the island of Ireland[9]. Had this volume of all island RoRo traffic total been split based on historical market shares, the green bars in Figure 5 indicate the totals for each route that *would* have been recorded. Instead, the blue bars in Figure 5 illustrate what was recorded on each route.

Figure 5: Predicted Route Volumes Vs Recorded Totals, Quantifying the Redistribution of ROI – GB Traffic



The most significant conclusion to draw from Figure 5 is that, of the ROI – GB RoRo traffic that has been redistributed, the vast majority has found its way onto ROI – EU services. The IMDO estimates that 80% of the displaced ROI – GB RoRo traffic has moved to ROI – EU services, while the remaining 20% has moved to NI – GB services. Importantly, this means that the majority of the redistributed ROI – GB traffic has remained within ports in the Republic of Ireland. The remaining volume, which has moved onto NI – GB services, represents a loss in business to ROI ports. However, as outlined above, much of this trade originated in Northern Ireland, and represents trade within the United Kingdom that previously made use of shipping services in the Republic of Ireland.

[9] The volume of RoRo units carried in Q3 2021 was 4% higher than in Q3 2019. For the purposes of this approximation, this growth rate was applied equally to each port on the island of Ireland.

(iv) Modal Shares

In the latest edition of the IMDO's annual report, the Irish Maritime Transport Economist (IMTE)[10], 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 for at least five years.

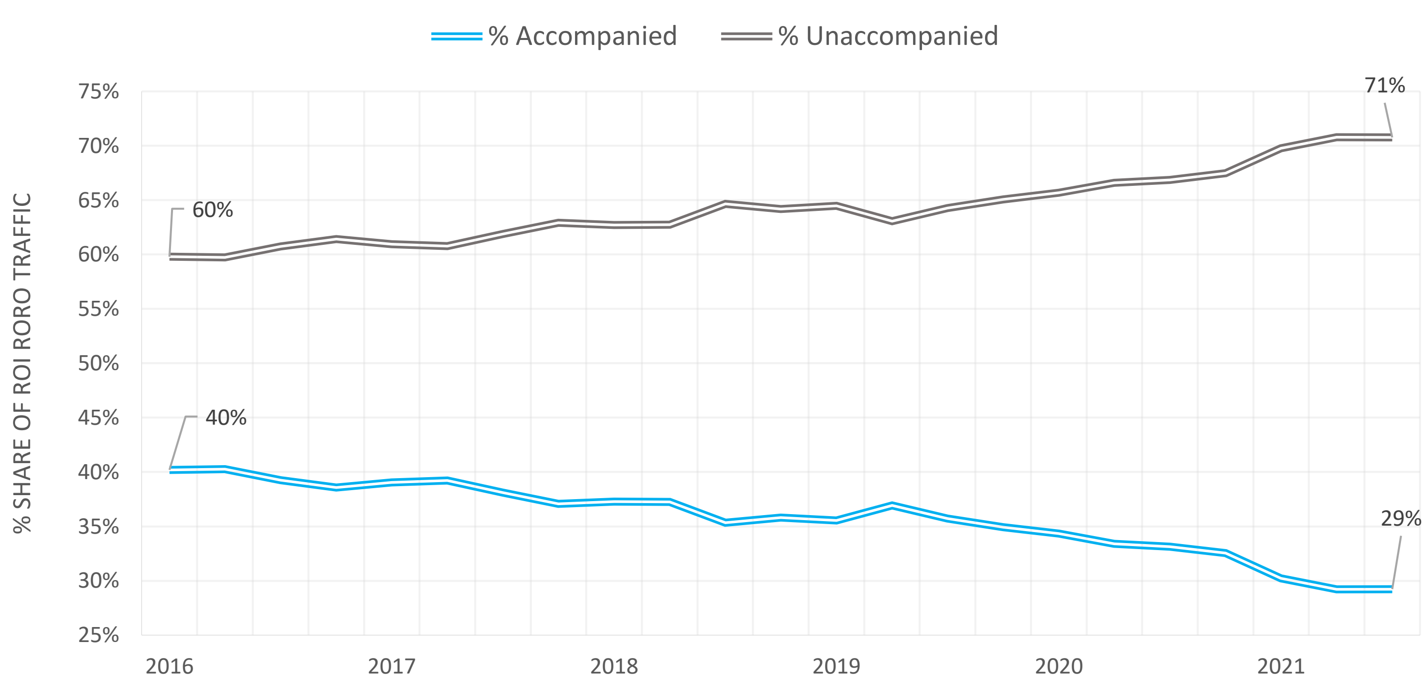
Beginning January 2021, this trend has accelerated. The widening gap between the shares of accompanied and unaccompanied RoRo traffic is illustrated in Figure 6 below. The share of unaccompanied RoRo has risen from 60% to 71% since 2016. Between Q4 2020 and Q3 2021, the share of unaccompanied traffic has risen from 67% to 71%.

As highlighted in previous IMDO reports, there are two main drivers of this modal shift.

Firstly, the onset of the COVID-19 pandemic accelerated the growth in the share of unaccompanied RoRo. Health & safety issues alongside restrictions on the travel of international freight drivers meant that unaccompanied traffic recorded shallower declines and a faster recovery during the first wave of the pandemic.

Secondly, the rise in direct EU volume will naturally be followed by a rise in unaccompanied volume. Traffic on ROI – EU routes makes disproportionate use of the unaccompanied mode due to, among other things, the significantly longer journey times on direct routes. The increase in ROI – EU RoRo traffic has been the most significant driver of unaccompanied RoRo traffic in 2021.

Figure 6: Share of ROI RoRo Market, % Accompanied Vs % Unaccompanied



[10] See Pg 26

Table 7 provides a breakdown of the volume of accompanied and unaccompanied RoRo traffic carried by each ROI port in Q3 2021. Table 8 presents the same between Q1 – Q3 2019 and Q1 – Q3 2021.

Table 7: All - Island RoRo Units, Accompanied Vs Unaccompanied, Q3 2019 – Q3 2021

	ACCOMPANIED			UNACCOMPANIED		
	Q3 2019	**Q3 2020**	**Q3 2021**	**Q3 2019**	**Q3 2020**	**Q3 2021**
Cork	1,108	92	477	468	335	1,412
Dublin	89,565	86,410	64,486	175,903	189,855	186,570
Rosslare	16,246	15,772	22,126	14,568	16,267	22,849
Total ROI	**106,919**	**102,274**	**87,089**	**190,939**	**206,457**	**210,831**
NI	81,839	77,522	89,322	132,326	140,446	147,639
Total All - Island	**188,758**	**179,796**	**176,411**	**323,265**	**346,903**	**358,470**

Table 8: All - Island RoRo Units, Accompanied Vs Unaccompanied, Q1 – Q3 2019, 2020 & 2021

	ACCOMPANIED			UNACCOMPANIED		
	Q1 - Q3 2019	**Q1 - Q3 2020**	**Q1 - Q3 2021**	**Q1 - Q3 2019**	**Q1 - Q3 2020**	**Q1 - Q3 2021**
Cork	3,036	549	1,050	1,298	779	3,171
Dublin	269,560	241,262	181,555	524,598	515,756	524,966
Rosslare	48,554	42,562	67,598	44,348	45,566	69,301
Total ROI	**321,150**	**284,373**	**250,203**	**570,244**	**562,101**	**597,438**
NI	240,988	206,203	258,242	265,698	248,726	292,071
Total All - Island	**373,381**	**310,780**	**332,034**	**645,004**	**604,370**	**678,679**

4. LoLo Market

Table 9 details the volume of LoLo TEUs handled between Q3 2019 and Q3 2021. Table 10 presents the same between Q1 – Q3 2019 and Q1 – Q3 2021.

In Q3 2021, LoLo TEUs through ports in the Republic of Ireland grew by 10% compared to Q3 2020. The last four quarters (i.e. Q4 2020 – Q3 2021) have been the busiest on record for LoLo traffic in the Republic of Ireland.

In Northern Ireland, LoLo volumes are also strong. When LoLo freight at Northern Ireland's two LoLo ports, Belfast and Warrenpoint, are combined, volumes are significantly above 2020 levels, and slightly above 2019 levels (See Tables 9 & 10).

Table 9: All - Island LoLo TEUs, Q3 2019 – Q3 2021

	Q3 2019	Q3 2020	Q3 2021	Growth Vs 2020	Growth Vs 2019
	TEUs	**TEUs**	**TEUs**	**(%)**	**(%)**
Cork	61,182	66,026	74,691	13%	22%
Dublin	191,785	192,166	212,338	10%	11%
Waterford	13,238	14,696	12,736	-13%	-4%
ROI	**266,206**	**272,887**	**299,765**	**10%**	**13%**
NI	63,062	52,084	64,924	25%	3%
All - Island	**329,267**	**324,971**	**364,689**	**12%**	**11%**

Table 10: All - Island LoLo TEUs, Q1 – Q3 2019, 2020 & 2021

LoLo	Q1 - Q3 2019	Q1 - Q3 2020	Q1 - Q3 2021	Growth Vs 2020	Growth Vs 2019
	TEUs	**TEUs**	**TEUs**	**(%)**	**(%)**
Cork	181,352	184,989	211,898	15%	17%
Dublin	584,125	552,112	637,401	15%	9%
Waterford	35,670	39,840	37,026	-7%	4%
ROI	**801,146**	**776,941**	**886,324**	**14%**	**11%**
NI	187,240	158,099	194,706	23%	4%
All - Island	**988,386**	**935,040**	**1,081,030**	**16%**	**9%**

Surge in 'Direct Demand'

The vast majority of LoLo services on the island of Ireland are direct to continental EU ports. From here, many goods continue on to countries outside the European Union, such as the USA and China.

The factors that have driven a surge in ROI – EU RoRo traffic are therefore applicable to the Irish LoLo market. Shipping services offered by both sectors can be effective substitutes for one another, and shipping operators compete for similar business. LoLo volumes have benefitted from the demand from Irish importers and exports to access EU ports directly, without the need to adhere to new customs requirements at UK ports.

In Q4 2020, the surge in LoLo traffic was driven by pre-Brexit preparations, which signaled the beginning of a reorganisation of supply chains towards direct EU shipping services such as LoLo and ROI – EU RoRo services. A volume of 282,000 TEUs was achieved in Q4 2020, the busiest quarter on record until that point. In Q1 2021, another 281,000 TEUs was recorded by the IMDO, an incredibly robust performance given the economic restrictions imposed during that period in Ireland and much of Europe.

In the second quarter of 2021, the LoLo market benefitted from the reopening of certain sectors of the Irish and European economy, and a more accurate insight into the demand for LoLo services emerged. Between Q1 & Q2 2021, LoLo traffic grew by 13% on a seasonally adjusted basis and surpassed 300,000 TEUs in a single quarter for the first time. In Q3, LoLo traffic has remained steady, recording 299,765 TEUs. Overall, for the first nine months of the year, ROI LoLo volumes have grown by 14% compared to 2020.

As a result of this growth, it is clear that the substitutability between accompanied RoRo, unaccompanied RoRo and LoLo services has become significantly more pronounced in 2021, with increased competition and dynamic capacity evident in each market.

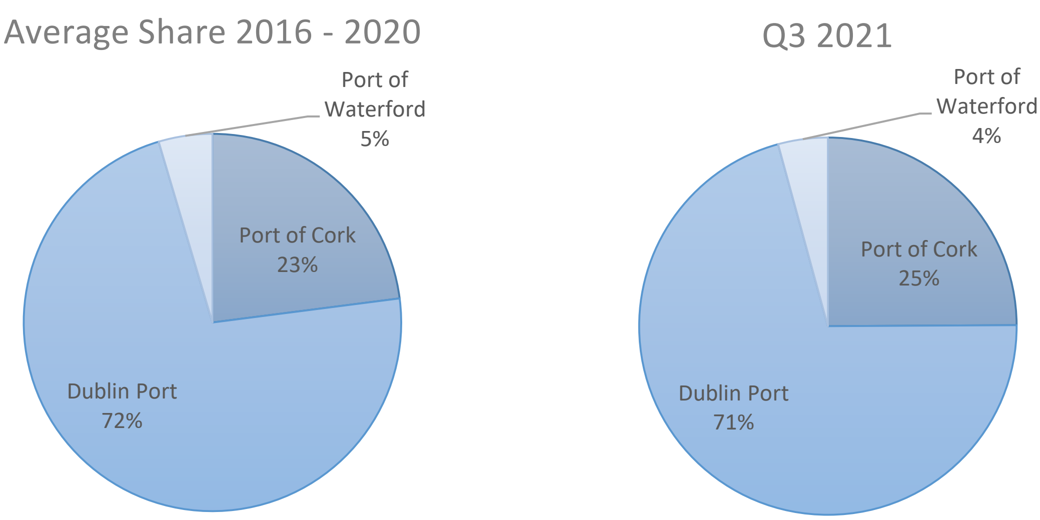
Port Performances

In proportional terms, The Port of Cork has gained most from the surge in LoLo traffic. In Q3 2021, Cork handled 25% of LoLo traffic in Ireland, despite handling an average of 23% in recent years. Dublin Port now holds a 71% market share, while Waterford holds a 4% share (See Figure 7). Overall, unlike the RoRo freight market, the pre-Brexit shares of LoLo freight held by each port have not changed significantly. As a result, the gains made within the LoLo freight market have largely been divided in line with historical market shares.

In the last nine months, Dublin Port and The Port of Cork have handled unprecedented volumes of LoLo traffic. The last two quarters, Q2 & Q3 2021, have been the busiest on record for both ports. In Cork, 74,000 TEUs were handled at the port in each quarter. In Dublin, 218,000 TEUs were handled in Q2 and 212,000 TEUs were handled in Q3. In Waterford, over 12,000 TEUs have been handled in each quarter of 2021, a robust volume which is above average for recent years. In 2021, the pace of LoLo growth at Waterford has been lower than that of Cork and Dublin.

In Northern Ireland, the rate of growth has also been significant. LoLo traffic at Belfast Harbour grew by 23% in Q3 2021 compared to Q3 2020, while LoLo traffic through Warrenpoint grew by 46%. Overall, LoLo volumes in Northern Ireland grew by 25% in Q3 2021. When compared to 2019, the pace of LoLo growth in Northern Ireland is more subdued. For the first nine months of the year of 2021, LoLo volumes through Northern Ireland ports are 4% higher than the same period in 2019 (See Tables 9 & 10).

Figure 7: Share of ROI LoLo TEUs, Q3 2021 Vs Average 2016 - 2020



Laden & Unladen LoLo Volumes

In the LoLo freight market, TEUs can be either laden (full), or unladen (empty). The market for unladen containers is an important aspect of the market, and the capacity provided will adjust to the current needs of Irish importers and exporters. Table 11 below details the volumes of laden and unladen LoLo traffic handled at ports on the island of Ireland in the first nine months of 2021.

Table 11: All - Island LoLo TEUs, Laden Vs Unladen, Q1 – Q3 2019, 2020 & 2021

	LADEN			UNLADEN		
	Q1 - Q3 2019	**Q1 - Q3 2020**	**Q1 - Q3 2021**	**Q1 - Q3 2019**	**Q1 - Q3 2020**	**Q1 - Q3 2021**
Cork	140,724	141,959	162,595	40,629	43,031	49,302
Dublin	447,259	420,466	484,097	136,866	131,646	153,304
Waterford	23,686	27,365	26,180	11,984	12,476	10,845
Total ROI	**611,668**	**589,789**	**672,873**	**189,478**	**187,152**	**213,452**
NI	138,785	116,246	139,478	48,455	41,854	55,228
Total All - Island	**750,454**	**706,035**	**812,351**	**237,933**	**229,006**	**268,680**

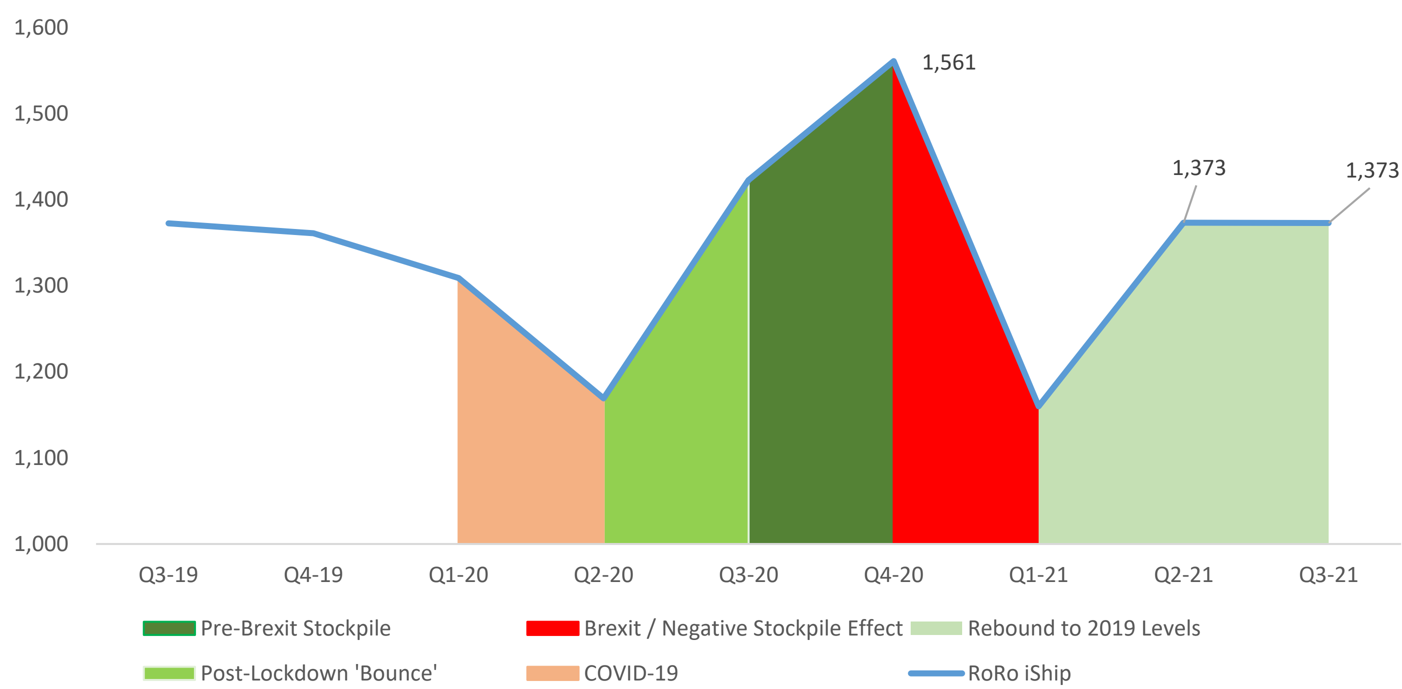
5. Unitised Trade iShip Index

Since 2007 the IMDO has produced the iShip Index, a quarterly weighted indicator that outlines trends within Ireland's[11] shipping industry, and as a result, the wider economy. The index accounts for five separate market segments, representing the main maritime traffic sectors moving through ports in Ireland. Unitised trade includes Lift-on/Lift-off (LoLo) and Roll-on/ Roll-of (RoRo), while Bulk traffic includes Break Bulk, Dry Bulk and Liquid Bulk. In order to establish a common denominator, the 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 is Q1 2007 at which point, all indices were set at 1,000.

Figure 8 below shows the RoRo iShip index for the period between Q3 2019 and Q3 2021. In the last twelve months, significant fluctuation was evident in the RoRo freight market due to the overlapping events of COVID-19 and Brexit. In Q3 2021, the RoRo iShip value is unchanged from Q2 2021. The index currently stands at 1,373.

The shaded areas in Figure 8 denote the predominant drivers of disruptions during each of the last six quarters. This began with the onset of the first wave of COVID-19 in Ireland in Q2 2020, followed by a post-lockdown 'bounce' in demand due to sectoral reopenings in Q3. Attentions then turned to the pre-Brexit stockpile of goods that was built up in Q4 2020 to combat the uncertainty surrounding new customs procedures at UK ports from January 1st 2021. In Q1 2021, the combined impact of lockdown measures and the stockpiling of goods brought RoRo traffic to its lowest point since 2015. In Q2 & Q3 2021, a post-lockdown, and post-stockpile bounce in demand was recorded, leaving RoRo traffic back at 2019 levels.

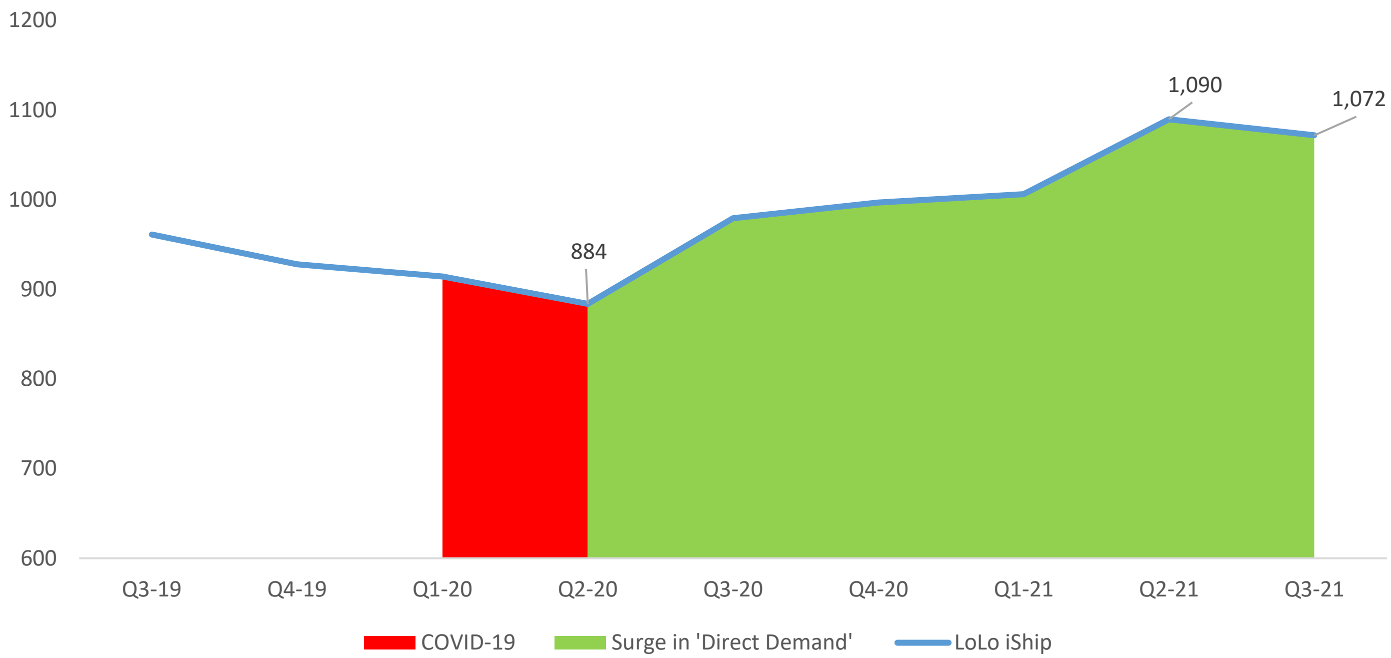
Figure 8: RoRo iShip Index (Q1 2007 = 1000):



[11] The iShip index does not include ports in Northern Ireland.

Figure 9 below presents the LoLo iShip index for the period between Q3 2019 and Q3 2021. Following the onset of the COVID-19 pandemic in Ireland in March 2020, the LoLo freight market has been defined by consistent growth that has seen the volume of TEUs handled at Irish ports reach unprecedented levels. This trend is denoted by the green shaded area in Figure 9. In Q1 2021, the LoLo iShip index surpassed 1000 for the first time since 2007. In Q2, the LoLo iShip index recorded its highest value ever, at 1,090. At its current rate, the LoLo market will record its busiest year since 2007. The LoLo iShip index currently stands at 1,072.

Figure 9: LoLo iShip Index (Q1 2007 = 1000):



6. Passenger Market

Table 12 details the volume of passengers[12] that travelled through Irish and Northern Irish ports between Q3 2019 and Q3 2021. Table 13 presents the same between Q1 – Q3 2019 and Q1 – Q3 2021.

Following the introduction of the EU Digital COVID Certificate in July 2021, the volume of passengers on maritime services in the Republic of Ireland rose significantly. Tourism / passenger numbers in the Republic of Ireland increased by 86% in Q3 2021 when compared to Q3 2020. In the summer of 2020, many international travel restrictions were still in place, both in the Republic of Ireland and across Europe. As a result, passenger volumes throughout 2020 were severely depressed. When compared to Q3 2019, passenger numbers in Q3 2021 declined by 56%. Since the initial wave of the pandemic in Ireland, this is the closest the industry has come to returning to 2019 levels.

In Northern Ireland, passenger numbers in Q3 2021 have returned to pre-pandemic levels. When combined, passenger numbers through Belfast Harbour and the Port of Larne doubled when compared to Q3 2020, and are 9% above Q3 2019.

Overall, for the first 9 months of the year, passenger numbers on the island of Ireland are still significantly below 2019 levels. However, the introduction of the Digital COVID Certificate had made a positive impact on volumes both North and South.

Table 12: All - Island Passenger Numbers, Q3 2019 – Q3 2021

	Q3 2019	Q3 2020	Q3 2021	Growth Vs 2020	Growth Vs 2019
Cork	59,735	4,650	16,190	248%	-73%
Dublin	728,340	182,658	315,265	73%	-57%
Rosslare	254,717	57,100	122,411	114%	-52%
ROI	**1,042,792**	**244,408**	**453,866**	**86%**	**-56%**
NI	**667,966**	**357,534**	**729,524**	104%	9%
All Island	**1,710,758**	**601,942**	**1,183,390**	97%	-31%

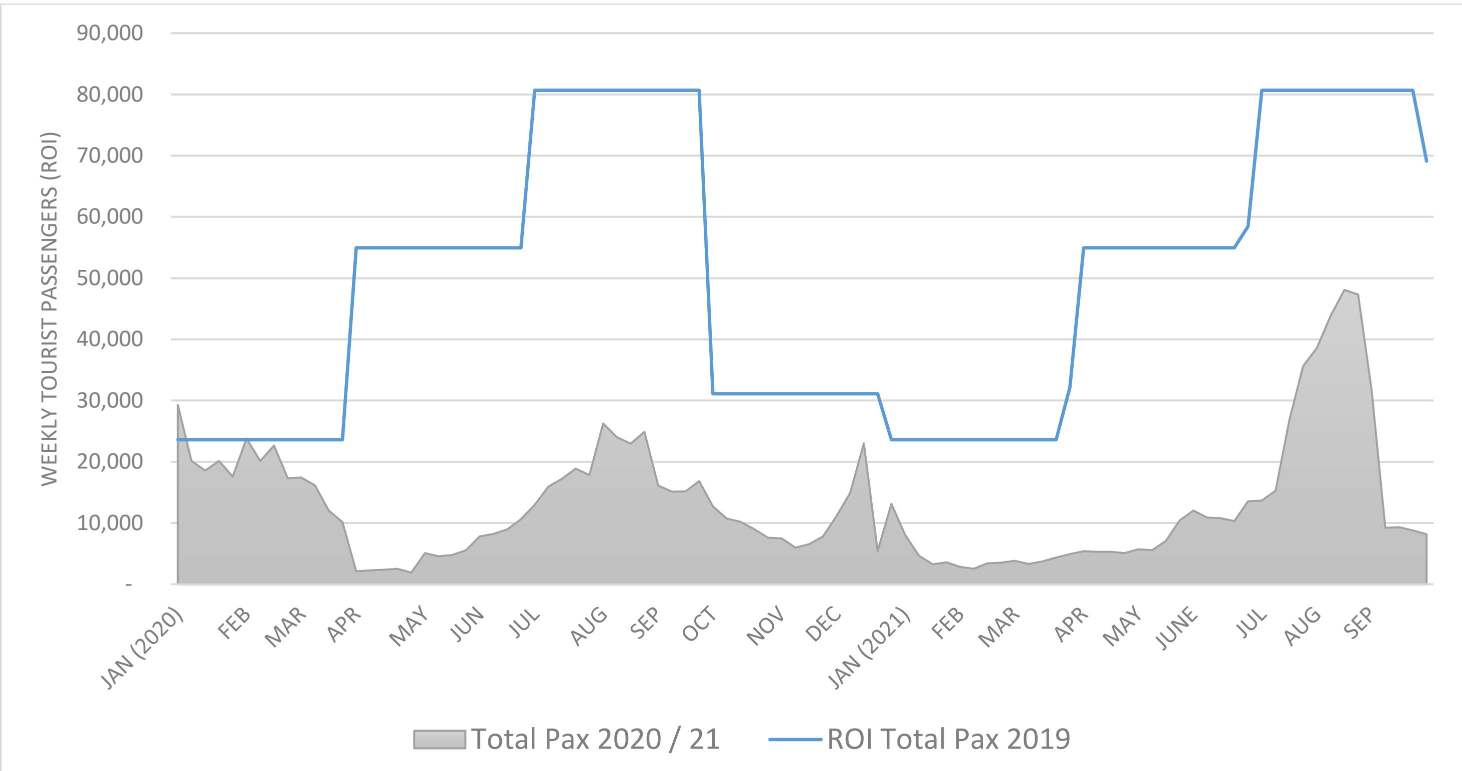
Table 13: All - Island Passenger Numbers, Q1 – Q3 2019, 2020 & 2021

	Q1 - Q3 2019	Q1 - Q3 2020	Q1 - Q3 2021	Growth Vs 2020	Growth Vs 2019
Cork	101,189	6,281	16,771	167%	-83%
Dublin	1,468,473	423,542	442,514	4%	-70%
Rosslare	491,127	126,192	160,192	27%	-67%
ROI	**2,060,789**	**556,015**	**619,477**	11%	-70%
NI	**1,419,854**	**659,434**	**1,226,981**	86%	-14%
All Island	**3,480,643**	**1,215,449**	**1,846,458**	52%	-47%

[12] In order separate the volume of tourist passengers from commercial passengers (such as drivers, crew etc), some estimates are included in Tables 12 & 13. These figures may be subject to revision in later IMDO reports.

Figure 10 presents the weekly volume of passengers that transited through ROI ports in 2019, 2020 and 2021. Figure 10 illustrates the significant impact that the EU Digital COVID Certificate had in July 2021. Considerable challenges still face RoPax operators in the Republic of Ireland. Consistently low passenger volumes expose the RoPax model to long term vulnerability, as well as being detrimental to the domestic tourism market. Overall, passenger volumes in Q3 2021 are above 2020 levels, but still significantly below those of 2019.

Figure 10: Weekly Passenger (Pax) Volumes, Republic of Ireland, Q1 – Q3 2019, 2020 & 2021



Appendix

Appendix 1: RoRo Traffic

A. Q1 2019 – 2021

	Q1 2019	Q1 2020	Q1 2021	Growth Vs 2020	Growth Vs 2019
	RoRo Units	RoRo Units	RoRo Units	(%)	(%)
Cork	1,071	729	955	31%	-11%
Dublin	270,099	255,708	205,516	-20%	-24%
Rosslare	30,405	27,608	45,259	64%	49%
ROI	**301,575**	**284,045**	**251,730**	**-11%**	**-17%**
NI	209,545	205,923	221,863	8%	6%
All - Island	**511,120**	**489,968**	**473,593**	**-3%**	**-7%**

B. Q2 2019 – 2021

	Q2 2019	Q2 2020	Q2 2021	Growth Vs 2020	Growth Vs 2019
	RoRo Units	RoRo Units	RoRo Units	(%)	(%)
Cork	1,687	172	1,377	701%	-18%
Dublin	258,591	225,045	249,949	11%	-3%
Rosslare	31,684	28,481	46,666	64%	47%
ROI	**291,962**	**253,698**	**297,992**	**17%**	**2.1%**
NI	215,302	171,484	239,128	39%	11%
All - Island	**507,264**	**425,182**	**537,120**	**26%**	**6%**

C. Q3 2019 – 2021

	Q3 2019	Q3 2020	Q3 2021	Growth Vs 2020	Growth Vs 2019
	RoRo Units	RoRo Units	RoRo Units	(%)	(%)
Cork	1,576	427	1,889	342%	20%
Dublin	265,468	276,265	251,056	-9%	-5%
Rosslare	30,813	32,038	44,975	40%	46%
ROI	**297,857**	**308,730**	**297,920**	**-4%**	**0.02%**
NI	214,165	217,968	236,961	9%	11%
All - Island	**512,022**	**526,698**	**534,881**	**2%**	**4%**

Appendix 2: ROI – GB RoRo Traffic

A. Q1 2019 – 2021

		Dublin - GB	Rosslare - GB	ROI - GB	NI - GB
Total Q1	**Q1 2019**	231,340	*25,170*	256,510	209,545
	Q1 2020	213,346	*21,842*	235,188	205,923
	Q1 2021	148,609	*14,278*	162,887	221,863
	Growth Vs 2020 (%)	***-30%***	***-35%***	***-31%***	***8%***
	Growth Vs 2019 (%)	***-36%***	***-43%***	***-36%***	***6%***

B. Q2 2019 – 2021

		Dublin - GB	Rosslare - GB	ROI - GB	NI - GB
Total Q2	**Q2 2019**	217,708	26,232	243,940	215,302
	Q2 2020	187,360	21,845	209,205	171,484
	Q2 2021	181,996	16,818	198,814	239,128
	Growth Vs 2020 (%)	***-3%***	***-23%***	***-5%***	***39%***
	Growth Vs 2019 (%)	***-16%***	***-36%***	***-18%***	***11%***

C. Q3 2019 – 2021

		Dublin - GB	Rosslare - GB	ROI - GB	NI - GB
Total Q3	**Q3 2019**	225,394	25,790	251,184	214,165
	Q3 2020	234,160	25,328	259,488	217,968
	Q3 2021	183,731	16,872	200,603	236,961
	Growth Vs 2020 (%)	***-22%***	***-33%***	***-23%***	***9%***
	Growth Vs 2019 (%)	***-18%***	***-35%***	***-20%***	***11%***

Appendix 3: ROI – EU RoRo Traffic

A. Q1 2019 – 2021

		Cork - EU	Dublin - EU	Rosslare - EU	ROI - EU
Total Q1	Q1 2019	1,071	38,759	5,235	45,065
	Q1 2020	729	42,362	5,766	48,857
	Q1 2021	955	56,907	30,981	88,843
	Growth Vs 2020 (%)	***31%***	***34%***	***437%***	***82%***
	Growth Vs 2019 (%)	***-11%***	***47%***	***492%***	***97%***

B. Q1 2019 – 2021

		Cork - EU	Dublin - EU	Rosslare - EU	ROI - EU
Total Q2	Q2 2019	1,687	40,883	5,453	48,023
	Q2 2020	172	37,685	6,636	44,493
	Q2 2021	1,377	67,953	29,847	99,177
	Growth Vs 2020 (%)	***701%***	***80%***	***350%***	***123%***
	Growth Vs 2019 (%)	***-18%***	***66%***	***447%***	***107%***

C. Q1 2019 – 2021

		Cork - EU	Dublin - EU	Rosslare - EU	ROI - EU
Total Q3	Q3 2019	1,576	40,074	5,023	46,673
	Q3 2020	427	42,105	6,710	49,242
	Q3 2021	1,889	67,325	28,103	97,317
	Growth Vs 2020 (%)	***342%***	***60%***	***319%***	***98%***
	Growth Vs 2019 (%)	***20%***	***68%***	***459%***	***109%***

Appendix 4: ROI LoLo Traffic

A. Q1 2019 – 2021

	Q1 2019	Q1 2020	Q1 2021	Growth Vs 2020	Growth Vs 2019
	TEUs	**TEUs**	**TEUs**	**(%)**	**(%)**
Cork	56,533	53,540	62,764	17%	11%
Dublin	191,268	187,292	206,586	10%	8%
Waterford	10,518	12,820	12,004	-6%	14%
ROI	**258,318**	**253,652**	**281,354**	**11%**	**9%**
NI	61,235	55,661	62,719	13%	2%
All - Island	**319,553**	**309,313**	**344,073**	**11%**	**8%**

B. Q2 2019 – 2021

	Q2 2019	Q2 2020	Q2 2021	Growth Vs 2020	Growth Vs 2019
	TEUs	**TEUs**	**TEUs**	**(%)**	**(%)**
Cork	63,637	65,424	74,443	14%	17%
Dublin	201,072	172,654	218,477	27%	9%
Waterford	11,914	12,325	12,286	0%	3%
ROI	**276,623**	**250,403**	**305,205**	**22%**	**10%**
NI	62,943	50,355	67,064	33%	7%
All - Island	**339,566**	**300,757**	**372,269**	**24%**	**10%**

C. Q3 2019 – 2021

	Q3 2019	Q3 2020	Q3 2021	Growth Vs 2020	Growth Vs 2019
	TEUs	**TEUs**	**TEUs**	**(%)**	**(%)**
Cork	61,182	66,026	74,691	13%	22%
Dublin	191,785	192,166	212,338	10%	11%
Waterford	13,238	14,696	12,736	-13%	-4%
ROI	**266,206**	**272,887**	**299,765**	**10%**	**13%**
NI	63,062	52,084	64,924	25%	3%
All - Island	**329,267**	**324,971**	**364,689**	**12%**	**11%**