



Irish Maritime
Development Office



Foras na Mara
Marine Institute

UNITISED TRAFFIC REPORT H1 2025

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UNITISED TRAFFIC REPORT – H1 (Q1 + Q2) 2025

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 is 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

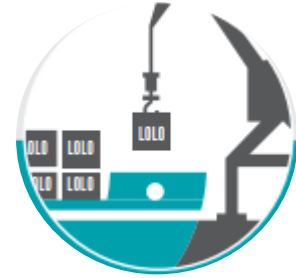
1. **UK Landbridge:** The UK Landbridge is a term used to describe a route to market that connects Irish importers and exporters to international markets via the UK road and ports network. It is a strategically important means of access to the single market that has been favoured by traders in high value 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.

UNITISED TRAFFIC GROWTH IN H1 2025 (Vs H1 2024)



ROI RORO: 56%

NI RORO: 44%



ROI LOLO: 11%

NI LOLO: 0%



ROI Tourist Passengers: -3%

NI Tourist Passengers: 3%

All Island RoRo Share

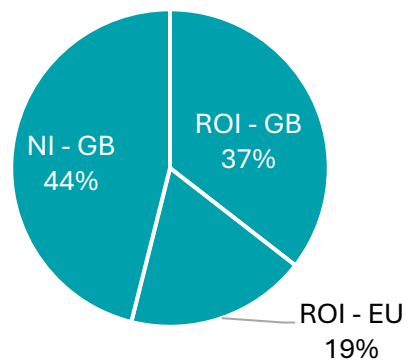


ROI – EU RoRo:

42%

ROI – GB RoRo:

58%



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Comment

In the first half of 2025, unitised traffic on the island of Ireland exhibited diverging patterns across the two principal cargo modes. Roll-on/Roll-off (RoRo) volumes in the Republic of Ireland declined modestly, falling by 2% to 573,038 units, while Northern Ireland recorded a 2% increase to 460,730 units. By contrast, Lift-on/Lift-off (LoLo) throughput grew strongly in the Republic of Ireland, increasing by 11% to 643,631 TEUs, while remaining broadly stable in Northern Ireland at 109,412 TEUs. The combined effect is that all-island RoRo traffic was largely unchanged on 2024 levels, while all-island LoLo volumes rose by 9%.

These traffic outcomes took place against a backdrop of favourable macroeconomic conditions. According to the Central Statistics Office, inflation in Ireland averaged 1.6% in the first half of 2025, below the Eurozone average of 2%. Unemployment stood at 4.7%, compared with 5.9% in the EU, while employment levels remain historically high, with half a million additional jobs created since 2019.¹ Fiscal policy has also remained expansionary, supported by elevated corporation tax receipts. The Government's Summer Economic Statement 2025² announced €34 billion in additional capital investment over the next decade, including electrical grid, water, housing, and transport infrastructure. These indicators point to continued strength in the domestic economy and provide a supportive environment for trade flows through Irish ports.

Within this context, the most notable development in recent quarters has been the divergence in trends between the RoRo and LoLo markets. The IMDO's analysis using a Hodrick–Prescott (HP) filter of quarterly time series data highlights this divergence clearly. The HP filter is a standard statistical tool used in economics to separate long-term trends from short-term fluctuations. When applied to RoRo and LoLo volumes, it shows that RoRo traffic has plateaued and is gradually declining, while LoLo traffic is on a pronounced upward trajectory. The chart below illustrates these opposing movements, with LoLo throughput reaching new highs while RoRo stabilises.

This juxtaposition is significant for policymakers and industry stakeholders as RoRo and LoLo represent approximately half of all freight transport through Irish ports. Their diverging paths have implications for infrastructure planning and future capacity requirements. The relationship between the two modes is complex, with substitutability varying across markets, routes, and product groups. The IMDO continues to analyse these dynamics and engage with shipping operators, port companies, and trade stakeholders to better understand the drivers.

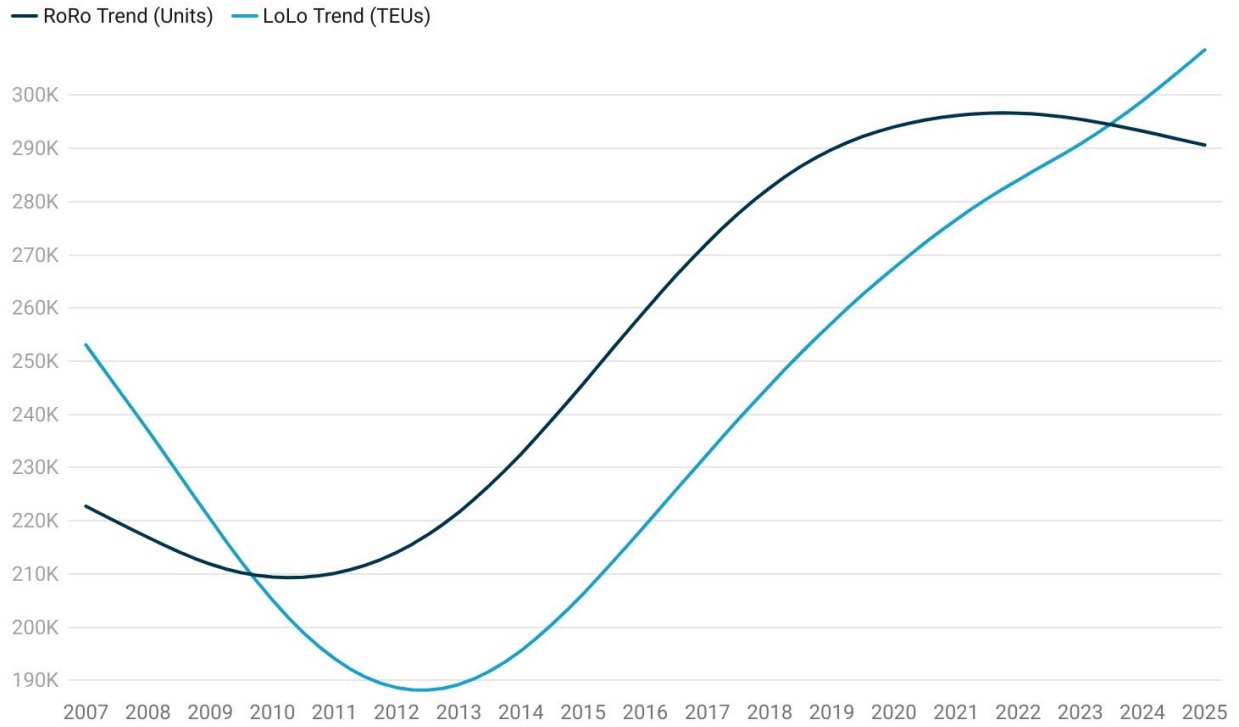
The evidence to date confirms that the unitised freight market remains resilient, with LoLo recording record throughput in the Republic of Ireland and RoRo volumes holding steady. The differing trajectories underline the importance of continuous monitoring, rigorous analysis, and open dialogue with industry. The IMDO will continue to report quarterly on these developments, providing

¹ Irish Fiscal Advisory Council (2025). Fiscal Assessment Report Ireland's outlook: strong today, uncertain tomorrow.

²Department of Finance (2025). *Summer Economic Statement 2025*.

government and stakeholders with objective and timely information to inform policy and investment decisions.

Fig 1: Unitised Traffic Quarterly Trend



Created with Datawrapper

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 2024 and 2025. 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 2024 | Q1 2025 | % Ch | Diff |
|----------------------------|-------------------|-------------------|------------|-------------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin | 236,328 | 220,831 | -7% | -15,497 |
| Rosslare - Europort | 49,513 | 53,948 | 9% | 4,435 |
| Cork | 2,068 | 1,814 | -12% | -254 |
| Republic of Ireland | 287,909 | 276,593 | -4% | -11,316 |
| Belfast | 146,485 | 155,638 | 6% | 9,153 |
| Larne | 46,441 | 43,312 | -7% | -3,129 |
| Warrenpoint | 27,267 | 27,711 | 2% | 444 |
| Northern Ireland | 220,193 | 226,661 | 3% | 6,468 |
| All - Island | 508,102 | 503,254 | -1% | -4,848 |

Table 2:

| Port | Q2 2024 | Q2 2025 | % Ch | Diff |
|----------------------------|-------------------|-------------------|-----------|-------------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin | 242,206 | 236,854 | -2% | -5,352 |
| Rosslare - Europort | 52,190 | 57,740 | 11% | 5,550 |
| Cork | 1,907 | 1,851 | -3% | -56 |
| Republic of Ireland | 296,303 | 296,445 | 0% | 142 |
| Belfast | 161,749 | 160,934 | -1% | -815 |
| Larne | 40,976 | 44,533 | 9% | 3,557 |
| Warrenpoint | 28,953 | 28,602 | -1% | -351 |
| Northern Ireland | 231,678 | 234,069 | 1% | 2,391 |
| All - Island | 527,981 | 530,514 | 0% | 2,533 |

Table 3:

| Port | H1 2024 | H1 2025 | % Ch | Diff |
|----------------------------|------------------|------------------|------------|----------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin | 478,534 | 457,685 | -4% | -20,849 |
| Rosslare - Europort | 101,703 | 111,688 | 10% | 9,985 |
| Cork | 3,975 | 3,665 | -8% | -310 |
| Republic of Ireland | 584,212 | 573,038 | -2% | -11,174 |
| Belfast | 308,234 | 316,572 | 3% | 8,338 |
| Larne | 87,417 | 87,845 | 0% | 428 |
| Warrenpoint | 56,220 | 56,313 | 0% | 93 |
| Northern Ireland | 451,871 | 460,730 | 2% | 8,859 |
| All - Island | 1,036,083 | 1,033,768 | 0% | -2,315 |

Republic of Ireland

As evident from Table 3, RoRo volumes through ports in the Republic of Ireland (ROI) declined slightly in the first six months of the year (H1). A total of 573,038 units were handled at Dublin, Rosslare-Europort and Cork, which is 2% below 2024, equivalent to 11,174 fewer units.

Table 1 and Table 2 present the volume of RoRo traffic for Q1 2025 and Q2 2025, respectively. RoRo traffic in the Republic of Ireland declined by 4% in Q1 2025 compared with Q1 2024, before stabilising in Q2 with 0% year-on-year change. Between 2020 and 2024 the average Q1 RoRo total was approximately 282,000 units. Q1 2025 volumes are 1.8% below 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 ROI RoRo 2025 is in line with previous years. The five-year average for H1 RoRo units between 2020 and 2024 was approximately 574,000 units. The H1 volume for 2025 is similar to 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 Port of Cork, RoRo traffic in the first six months of 2025 fell compared to 2024 by 4% and 8% respectively. Dublin Port handled 20,849 fewer RoRo units, while Cork handled 310 fewer units. RoRo traffic at Rosslare however, rose by 10%, or 9,985 units.

The overall decline in ROI RoRo volumes in H1 2025 was driven in part by the disruption to the Port of Holyhead. In December 2024, Holyhead Port was severely disrupted following structural damage caused by Storm Darragh. Incidents which took place over the weekend of December 6th and 7th led to the collapse of Terminal 3, prompting the suspension of all ferry services between Dublin and Holyhead during a critical holiday period. The port remained closed for over five weeks, with limited operations resuming in mid-January 2025 via Terminal 5. Full restoration of Terminal 3 did not occur until July 2025.

The disruption significantly affected freight flows between Ireland and the UK, removing 104 weekly sailings between Dublin and Holyhead and forcing shipping companies to take swift action. For more information on the impact of the disruption on the Irish RoRo market, see the Irish Maritime Transport Economist, Vol 22 (p. 23)³.

The impact on Dublin Port traffic is evident, particularly in Q1 where the port recorded a 7% decline. Volumes improved once the partial reopening of Holyhead Port took place, and volumes declined by just 2% in Q2 2025.

Northern Ireland

In Northern Ireland, RoRo volumes in the first six months of the year rose by 2%, driven almost entirely by Belfast. Throughput at Belfast rose by 3%, while Larne and Warrenpoint volumes remained unchanged.

The disruption at the port of Holyhead was a key driver of increased volumes at NI ports, particularly in January 2025, before the partial reopening of Holyhead took place. All three NI ports rose in January, with Belfast throughput rising by 9%, adding over 4,000 units compared to January 2024. Belfast continued to record increased throughput in February and March, albeit at lower levels.

RoRo routes in Northern Ireland form an integral part of the island's broader freight and maritime network and are regularly used by importers and exporters in the Republic of Ireland, particularly where origin–destination patterns make their use more efficient. During the temporary closure of Holyhead, many routes from NI ports proved effective substitutes for Irish importers and exporters, and recorded significant increases throughout December 2024. In particular, services between Larne/Belfast and Cairnryan benefitted from the high frequency of service, with a sailing approximately every four hours. Overall, RoRo traffic at NI ports rose in both Q1 and Q2, with the disruption to Holyhead driving increased traffic in the early part of the year. For the first half of the year, RoRo traffic reached 460,000 units. The last time 460,000 units was reached was in 2021, when the end of the Brexit transition period drove a large increase in NI throughput. This highlights the extent to which Northern Ireland ports proved effective as substitutes for Irish supply chains during severe disruption at Dublin Port.

³ [Irish Maritime Transport Economist, Vol 22](#)

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 2024 | Q1 2025 | % Ch | Diff |
|-----------------|----------------|----------------|------------|---------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin - GB | 176,152 | 164,211 | -7% | -11,941 |
| Rosslare - GB | 15,402 | 19,330 | 26% | 3,928 |
| ROI - GB | 191,554 | 183,541 | -4% | -8,013 |

Table 5:

| Route | Q2 2024 | Q2 2025 | % Ch | Diff |
|-----------------|----------------|----------------|------------|---------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin - GB | 181,330 | 177,312 | -2% | -4,018 |
| Rosslare - GB | 16,538 | 18,801 | 14% | 2,263 |
| ROI - GB | 197,868 | 196,113 | -1% | -1,755 |

Table 6:

| Route | H1 2024 | H1 2025 | % Ch | Diff |
|-----------------|----------------|----------------|------------|---------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin - GB | 357,482 | 341,523 | -4% | -15,959 |
| Rosslare - GB | 31,940 | 38,131 | 19% | 6,191 |
| ROI - GB | 389,422 | 379,654 | -3% | -9,768 |

In the ROI – GB RoRo market, changes in the first half of 2025 were defined largely by the disruption to the port of Holyhead discussed in the previous section. In Dublin, volumes fell sharply in Q1, by 7%, before improving in Q2 once the partial reopening in Holyhead took place. For the first half of the year, Dublin Port’s GB traffic fell by 4% to 341,523 units. This is the lowest H1 volume for Dublin – GB traffic since 2021, when a large pre-Brexit stockpile in suppressed demand. The five year average for H1 Dublin – GB traffic is 364,189. H1 2025 throughput is 6% below this average.

Conversely, Rosslare – GB traffic rose by 19%, or 6,191 units, driven mainly by displaced demand from Dublin – Holyhead. Almost two thirds of Rosslare’s increase came in the first quarter, as the reopening of Terminal 5 in Holyhead did not occur until mid-January. For the first half of the year, Rosslare – GB rose to 38,131 units, its highest of the post-Brexit period and 12% above its five year average.

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 2024 | Q1 2025 | % Ch | Diff |
|-----------------|---------------|---------------|------------|---------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin - EU | 60,176 | 56,620 | -6% | -3,556 |
| Rosslare - EU | 34,111 | 34,618 | 1% | 507 |
| Cork - EU | 2,068 | 1,814 | -12% | -254 |
| ROI - EU | 96,355 | 93,052 | -3% | -3,303 |

Table 8:

| Route | Q2 2024 | Q2 2025 | % Ch | Diff |
|-----------------|---------------|----------------|-----------|--------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin - EU | 60,876 | 59,542 | -2% | -1,334 |
| Rosslare - EU | 35,652 | 38,939 | 9% | 3,287 |
| Cork - EU | 1,907 | 1,851 | -3% | -56 |
| ROI - EU | 98,435 | 100,332 | 2% | 1,897 |

Table 9:

| Route | H1 2024 | H1 2025 | % Ch | Diff |
|-----------------|----------------|----------------|------------|---------------|
| | RoRo Units | RoRo Units | % | RoRo Units |
| Dublin - EU | 121,052 | 116,162 | -4% | -4,890 |
| Rosslare - EU | 69,763 | 73,557 | 5% | 3,794 |
| Cork - EU | 3,975 | 3,665 | -8% | -310 |
| ROI - EU | 194,790 | 193,384 | -1% | -1,406 |

In the first half of 2025, RoRo traffic on ROI – EU routes fell by 1%, or 1,406 units. Between 2021 and 2024, the first years of the post-Brexit era, H1 RoRo traffic on these routes averaged approximately 195,000 units. In H1 2025, ROI – GB traffic is marginally 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 2025 volume.

RoRo traffic on Rosslare – EU routes increased by 5% in the first half of 2025, equivalent to 3,794 more units. At 73,557 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 declined by 4% in H1 2025. In Q1 2025, Dublin – EU traffic declined by 6%. This decline, which followed a 2% decline in Q2, was driven largely by a modal shift in the unitised traffic sector. New LoLo services were added to Dublin Port yet again in the second quarter of 2025, which 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 are 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.

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. To see the breakdown between unladen and laden units see Appendix.

Table 10: Q1 - LoLo Total

| Port | Q1 2024 | Q1 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|------------|---------------|
| | TEUs | TEUs | % | TEUs |
| Cork | 66,904 | 70,689 | 6% | 3,786 |
| Dublin | 204,001 | 226,234 | 11% | 22,233 |
| Waterford | 7,796 | 9,514 | 22% | 1,719 |
| Republic of Ireland | 278,700 | 306,437 | 10% | 27,737 |
| Belfast | 55,870 | 54,296 | -3% | -1,575 |
| Warrenpoint | 0 | 0 | | |
| Northern Ireland | 55,870 | 54,296 | -3% | -1,575 |
| All-Island | 334,570 | 360,732 | 8% | 26,162 |

Table 11: Q2 - LoLo Total

| Port | Q2 2024 | Q2 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|------------|---------------|
| | TEUs | TEUs | % | TEUs |
| Cork | 70,173 | 74,968 | 7% | 4,795 |
| Dublin | 220,702 | 249,227 | 13% | 28,525 |
| Waterford | 12,293 | 13,000 | 6% | 707 |
| Republic of Ireland | 303,168 | 337,194 | 11% | 34,027 |
| Belfast | 54,041 | 55,116 | 2% | 1,075 |
| Warrenpoint | 0 | 0 | | |
| Northern Ireland | 54,041 | 55,116 | 2% | 1,075 |
| All-Island | 357,209 | 392,311 | 10% | 35,102 |

Table 12: H1 – LoLo Total

| Port | H1 2024 | H1 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|------------|---------------|
| | TEUs | TEUs | % | TEUs |
| Cork | 137,077 | 145,658 | 6% | 8,581 |
| Dublin | 424,703 | 475,460 | 12% | 50,757 |
| Waterford | 20,088 | 22,514 | 12% | 2,426 |
| Republic of Ireland | 581,868 | 643,631 | 11% | 61,763 |
| Belfast | 109,911 | 109,412 | 0% | -499 |
| Warrenpoint | 0 | 0 | | |
| Northern Ireland | 109,911 | 109,412 | 0% | -499 |
| All-Island | 691,779 | 753,043 | 9% | 61,264 |

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 2025. This analysis details the performance across key ports—Cork, Dublin, Waterford, and Belfast—and examines the overall trends in LoLo traffic.

Q1 2025

In the first quarter of 2024, LoLo volumes exhibited an upward trend across the majority of Irish ports. The total volume for the Republic of Ireland increased by 10% compared to Q1 2024, with an additional 27,737 TEUs handled. Cork recorded a 6% increase, adding 3,786 TEUs, while Dublin saw a more substantial rise of 11%, equivalent to an additional 22,233 TEUs. Volumes in Waterford rose strongly, by 22%, equating to a gain of 1,719 TEUs.

When compared to previous years, this is the highest Q1 total for ROI LoLo traffic recorded by the IMDO and the first time LoLo traffic in the first quarter of the year has surpassed 300,000 TEU's.

In Belfast, LoLo throughput declined by 3% on 2024, with traffic falling by 1,154 units. 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 2020 and 2024 was 5.5% higher than that of Q1 2025.

Overall, in Q1 2025, the All-Island LoLo volume grew by 8%, with a total increase of 26,162 TEUs, driven by the strong performances in ROI ports.

Q2 2025

The second quarter of 2025 continued the upward trajectory observed in Q1. The Republic of Ireland's ports collectively handled 11% more LoLo cargo than in Q2 2024, adding 34,027 TEUs. Dublin led this growth with a 13% increase, representing an additional 28,525 TEUs.

New LoLo services were added to Dublin Port in the second quarter of 2025⁴, which reflects the strong growth in LoLo throughput in recent quarters through Irish ports.

Cork and Waterford also posted gains of 7% and 6%, respectively, with Cork handling 4,795 more TEUs and Waterford adding 707 TEUs.

When compared to previous Q2's, 2025 ROI LoLo throughput stands out. Just as in the first quarter, Q2 2025 was a new record for Irish LoLo volumes. The previous record for Q2 LoLo traffic was set in 2022, with 310,485 TEUs. At 337,194 TEUs, 2025 is 9% above this peak.

In Northern Ireland, Belfast's growth remained steady at 2% in Q2, adding 1,075 TEUs. Between 2019 and 2024, the average Q2 total was 58,518 TEUs, compared to 55,116 TEUs recorded in 2025. The loss of traffic through Warrenpoint has resulted in a decline in NI LoLo traffic of approximately 5,000 TEUs per quarter.

Overall, the All-Island total for Q2 2024 rose by 10%, corresponding to an increase of 35,102 TEUs.

H1 2025

When considering the first half of 2025 as a whole, all-island LoLo traffic increased by 9%, with a total volume of 753,043 TEUs, which is 61,264 TEUs more than in H1 2024. The Republic of Ireland recorded an 11% rise in volumes, adding 61,763 TEUs for a total of 643,631 TEUs. Growth rates in Dublin and Waterford stand out, with a 12% increase at eachport. Dublin maintained its dominant position in the market with a 74% share in H1. Cork also posted a solid performance with a 6% increase (+8,581 TEUs). In Northern Ireland, Belfast maintained 2024 levels at 109,000 TEUs.

At 643,631 TEUs, ROI LoLo traffic in H1 2025 is a record high. As highlighted in the IMDO's annual report, *The Irish Maritime Transport Economist*, the inflationary pressures in recent years have been significant - averaging 6%⁵ in 2023 - which suppressed port volume in the RoRo and LoLo sectors⁶. In the first half of 2024, Euro Area inflation has eased back to 2.5%, and in the first half of 2025, the average rate of inflation was 2.2%. This gradual easing of inflation has contributed to a strong LoLo market.

In Northern Ireland, H1 volumes remained flat on 2024 levels, which 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 2025 was marked by strong growth in LoLo volumes across ROI ports, with Dublin and Waterford leading the charge. The performance of Cork was also remarkable, while Belfast maintained its previous throughput. This upward trend suggests a resilient and expanding LoLo market on the island as inflationary pressures cool across the Euro Area.

⁴ [CLdN launches new Zeebrugge-Cork-Dublin container shipping service | CLdN](#)

⁵ HICP - monthly data (annual rate of change) - [Eurostat](#)

⁶ For more information on the impact of inflation on the Irish LoLo market, see [The Irish Maritime Transport Economist, Vol 21](#)

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 2024 however, the maritime passenger market has all but recovered, with volumes just slightly below 2019 levels.

Table 13:

| Passenger No. | Q1 2024 | Q1 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|-------------|----------------|
| | No. | No. | % | No. |
| Cork | 6,297 | 0 | -100% | -6,297 |
| Dublin | 261,140 | 202,724 | -22% | -58,416 |
| Rosslare-Europort | 65,641 | 70,145 | 7% | 4,504 |
| Republic of Ireland | 333,078 | 272,869 | -18% | -60,209 |
| Belfast | 284,102 | 292,285 | 3% | 8,183 |
| Larne | 78,706 | 65,804 | -16% | -12,902 |
| Northern Ireland | 362,808 | 358,089 | -1% | -4,719 |
| All-Island | 695,886 | 630,958 | -9% | -64,928 |

Table 14:

| Passenger No. | Q2 2024 | Q2 2025 | % Ch | Diff |
|----------------------------|------------------|------------------|-----------|---------------|
| | No. | No. | % | No. |
| Cork | 42,424 | 42,273 | 0% | -151 |
| Dublin | 477,718 | 511,217 | 7% | 33,499 |
| Rosslare-Europort | 168,620 | 167,068 | -1% | -1,552 |
| Republic of Ireland | 688,762 | 720,558 | 5% | 31,796 |
| Belfast | 462,364 | 482,777 | 4% | 20,413 |
| Larne | 102,249 | 110,974 | 9% | 8,725 |
| Northern Ireland | 564,613 | 593,751 | 5% | 29,138 |
| All-Island | 1,253,375 | 1,314,309 | 5% | 60,934 |

Table 15:

| Passenger No. | H1 2024 | H1 2025 | % Ch | Diff |
|----------------------------|------------------|------------------|------------|----------------|
| | No. | No. | % | No. |
| Cork | 48,721 | 42,273 | -13% | -6,448 |
| Dublin | 738,858 | 713,941 | -3% | -24,917 |
| Rosslare-Europort | 234,261 | 237,213 | 1% | 2,952 |
| Republic of Ireland | 1,021,840 | 993,427 | -3% | -28,413 |
| Belfast | 746,466 | 775,062 | 4% | 28,596 |
| Larne | 180,955 | 176,778 | -2% | -4,177 |
| Northern Ireland | 927,421 | 951,840 | 3% | 24,419 |
| All-Island | 1,949,261 | 1,945,267 | 0% | -3,994 |

The passenger market across Irish and Northern Irish ports experienced mixed results during the first half of 2025, with fluctuations in ferry passenger numbers across different regions and ports.

Q1 2025

In the first quarter of 2025, ferry passenger volumes on the island of Ireland fell significantly, with a decrease of 9% compared to Q1 2024, equating to a reduction of 64,928 passengers. However, the performance varied significantly across different ports. Dublin and Cork experienced a decline, while Rosslare grew passenger numbers by 4,504 passengers or 7% on Q1 2024.

In Northern Ireland, the performance was mixed. Belfast saw a 3% increase, gaining 8,183 passengers, while Larne experienced a weak Q1, dropping 12,902 passengers.

Q2 2025

In the busy second quarter period of 2025, the passenger market rebounded, with a 5% increase in all-island passenger numbers compared to Q2 2024, equating to 60,934 more passengers evenly balanced at both jurisdictions on the Island. The Republic of Ireland saw a 5% increase overall, with Dublin port reporting a strong quarter of 7% growth on Q2 2024. Cork recorded 151 fewer passengers, Rosslare-Europort saw a 1% reduction (1,552 passengers).

Northern Ireland's ports also recorded increases, in Belfast passenger figures increased by 20,413 (4%), while Larne saw a gain of 9% or 8,725 passengers. Northern Ireland also experienced 5% growth in Q2.

H1 2025

For the first half of 2025, the passenger market across the Island of Ireland remained stable compared to H1 2024, with a small reduction of 3,994 passengers (<1% fall in total passengers). The distribution of this decline was not equal. The Republic of Ireland experienced a 3% decline, with 28,413 fewer passengers overall. Dublin was the most affected which facilitated 24,917 fewer

passengers (-3%), while Cork had a 13% decline. Rosslare-Europort bucked the trend recording 1% growth with almost 3,000 more passengers than H1 2024.

In Northern Ireland, the overall performance was much better with a 3% increase in total passenger numbers, with 24,419 more passengers. Larne's decline of 2% (4,117 passengers) was offset by Belfast's 4% increase, adding 28,596 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 2024 | Q1 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|------------|----------------|
| Port | No. | No. | % | No. |
| Cork | 1,762 | 0 | -100% | -1,762 |
| Dublin | 59,811 | 55,323 | -8% | -4,488 |
| Rosslare-Europort | 27,538 | 30,178 | 10% | 2,640 |
| Republic of Ireland | 89,111 | 85,501 | -4% | -3,610 |
| Belfast | 72,819 | 70,589 | -3% | -2,230 |
| Larne | 20,167 | 15,884 | -21% | -4,283 |
| Northern Ireland | 92,986 | 86,473 | -7% | -6,513 |
| All-Island | 182,097 | 171,974 | -6% | -10,123 |

Table 17:

| Passenger Vehicles[1] | Q2 2024 | Q2 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|------------|---------------|
| Port | No. | No. | % | No. |
| Cork | 13,456 | 14,393 | 7% | 937 |
| Dublin | 104,077 | 138,529 | 33% | 34,452 |
| Rosslare-Europort | 66,815 | 66,117 | -1% | -698 |
| Republic of Ireland | 184,348 | 219,039 | 19% | 34,691 |
| Belfast | 107,793 | 110,115 | 2% | 2,322 |
| Larne | 30,873 | 33,282 | 8% | 2,409 |
| Northern Ireland | 138,666 | 143,397 | 3% | 4,731 |
| All-Island | 323,014 | 362,436 | 12% | 39,422 |

Table 18:

| <u>Passenger Vehicles[1]</u> | H1 2024 | H1 2025 | % Ch | Diff |
|------------------------------|----------------|----------------|------------|---------------|
| Port | No. | No. | % | No. |
| Cork | 15,218 | 14,393 | -5% | -825 |
| Dublin | 163,888 | 193,852 | 18% | 29,964 |
| Rosslare-Europort | 94,353 | 96,295 | 2% | 1,942 |
| Republic of Ireland | 273,459 | 304,540 | 11% | 31,081 |
| Belfast | 180,612 | 180,704 | 0% | 92 |
| Larne | 51,040 | 49,166 | -4% | -1,874 |
| Northern Ireland | 231,652 | 229,870 | -1% | -1,782 |
| All-Island | 505,111 | 534,410 | 6% | 29,299 |

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 2025

In Q1 2024, the passenger vehicle market on the island of Ireland recorded a slight decline of 6%, with 3,610 fewer vehicles compared to Q1 2024. Rosslare-Europort recorded 10% growth in Q1 equivalent to 2,640 units. However, this did not impact the national picture as both Dublin and Cork recorded a soft Q1, shedding approximately 6,000 units in total.

Northern Ireland's performance was also soft. Belfast saw a decrease of 3% (2,230 vehicles), while Larne experienced a 21% fall, decreasing by 4,283 vehicles versus Q1 2024. Northern Ireland as a whole, recorded a 7% decrease in vehicle numbers.

Q2 2025

In Q2 2025, the passenger vehicle market rebounded, with a 12% increase in all-island vehicle numbers, corresponding to 39,422 more vehicles. The Republic of Ireland saw 19% growth, with 34,691 more vehicles overall. Dublin recorded a whopping 33% increase (34,452 vehicles), Cork also reported an increase of 7% which was offset by a 1% decline at Rosslare.

Northern Ireland's ports also grew, with Larne experiencing an 8% increase (2,409 vehicles) while Belfast saw a 2% increase (2,322 vehicles), Overall, Northern Ireland saw a 3% increase in passenger vehicle numbers.

H1 2025

In the first half of 2025, the passenger vehicle market across ports on the island of Ireland increased by 6%, gaining a total of 29,299 vehicles compared to H1 2024. The Republic of Ireland recorded an 11% increase, with Dublin accounting for the largest share of this gain, adding 29,964 vehicles (an 18% climb). Rosslare-Europort also experienced an increase of 2%. While passenger vehicles in Cork fell by 5% or 825 vehicles below H1 2024.

In Northern Ireland, the overall performance was much weaker than the republic with a 1% decrease in vehicle numbers, with 1,782 fewer vehicles. Belfast's remained constant with just 92 fewer vehicles, was offset by Larne's 4% decrease (1,874 vehicles).

Appendix

| Laden LoLo | H1 2024 | H1 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|-----------|---------------|
| | TEU's | TEU's | % | TEU's |
| Cork | 105,356 | 109,967 | 4% | 4,611 |
| Dublin | 319,953 | 346,096 | 8% | 26,143 |
| Waterford | 13,753 | 15,233 | 11% | 1,480 |
| Republic of Ireland | 439,062 | 471,295 | 7% | 32,233 |
| Belfast | 84,792 | 85,279 | 1% | 487 |
| Warrenpoint | 0 | 0 | | |
| Northern Ireland | 84,792 | 85,279 | 1% | 487 |
| All Island | 523,854 | 556,574 | 6% | 32,720 |

| LoLo Unladen | H1 2024 | H1 2025 | % Ch | Diff |
|----------------------------|----------------|----------------|------------|---------------|
| | TEU's | TEU's | % | TEU's |
| Cork | 31,721 | 35,691 | 13% | 3,970 |
| Dublin | 104,750 | 129,365 | 23% | 24,615 |
| Waterford | 6,335 | 7,280 | 15% | 946 |
| Republic of Ireland | 142,806 | 172,336 | 21% | 29,530 |
| Belfast | 25,119 | 24,133 | -4% | -986 |
| Warrenpoint | 0 | 0 | | |
| Northern Ireland | 25,119 | 24,133 | -4% | -986 |
| All Island | 167,925 | 196,469 | 17% | 28,544 |