

## **Transport Research & Information Note**

# Trends in Road Freight Activity

February 2011

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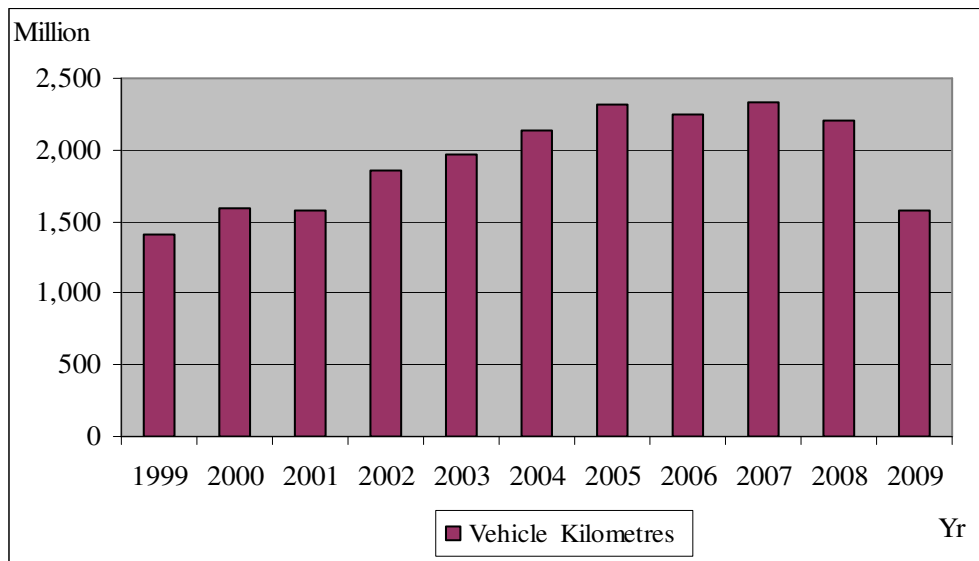
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## 1. General Overview

- 1.1. Road freight activity declined substantially in Ireland in 2009. The average number of Irish freight vehicles totalled 87,556 in 2009, a fall of over 10 per cent on 2007 levels. This fall brings the 2009 number of Irish freight vehicles back to 2006 levels.
- 1.2. The decline in the overall number of freight vehicles is in line with the decline in freight vehicle kilometres. Vehicle kilometres travelled by road freight reached 1,580 million kilometres in 2009, down from 2,332 million kilometres in 2007. This represents a fall of over 32 per cent from its peak, see Figure 1 below.

Figure 1: Vehicle Kilometres 1999-2009



Source: CSO

## 2. Activity By Type of Business

- 2.1. The decline in vehicle kilometres occurred across a number of business activities as outlined in Table 1. The largest decline occurred in the building and construction sector which fell 63 per cent over the two year period 2007-2009. This was followed by the manufacture of glass, cement and clay products and mining and quarrying sectors which fell by 50 per cent and 43 per cent respectively. The fall off in vehicle kilometres in these three sectors can be largely attributed to the significant decline in construction activity over the period. If construction related activities are excluded then the remaining traffic has fallen by 29 per cent between 2007 and 2009. Manufacture of food and feed stuffs was the only activity to see an increase in vehicle kilometres in 2008 and 2009. Transport and distribution activities still remain the most significant contributor to total vehicle kilometres.
- 2.2. The decline in freight activity has resulted in a greater proportion of the freight fleet being idle. Over the 2006-2008 period the proportion of idle vehicles in the fleet averaged 23 per cent. In 2009 the proportion of the fleet which was idle stood at 32 per cent. Of this 32 per cent, the greatest proportion was accounted for by 2-5 tonne vehicles.

Table 1: Road Freight Activity by Sector, 2007-2009

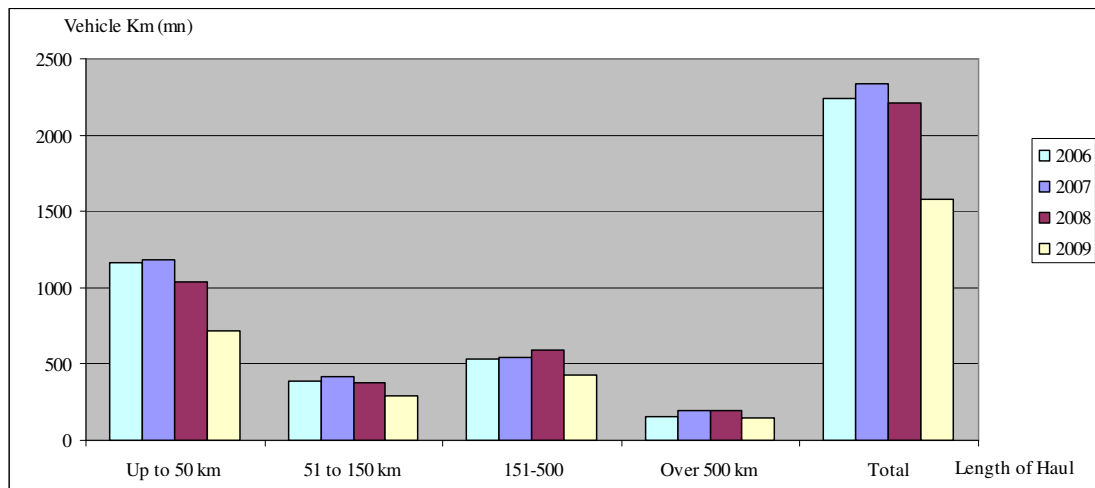
<b>Sector</b>	<b>2007 Vehicle Km (mn)</b>	<b>2008 Vehicle Km (mn)</b>	<b>2009 Vehicle Km (mn)</b>	<b>(%) Change 07-09</b>
<b>Building and construction</b>	156	106	58	-63
<b>Manufacture of glass, cement and clay products</b>	48	45	24	-50
<b>Mining and quarrying</b>	46	44	26	-43
<b>Local authorities</b>	31	28	18	-42
<b>Agriculture and livestock dealing</b>	65	49	40	-38
<b>Manufacture of drink and tobacco</b>	6	14	4	-33
<b>Distribution</b>	725	673	500	-31
<b>Transport</b>	936	899	653	-30
<b>Other manufacturing</b>	96	105	69	-28
<b>Other Activities</b>	176	177	129	-27
<b>Manufacturing industry</b>	244	276	182	-25
<b>Creameries and agricultural co-op</b>	6	10	5	-17
<b>Manufacture of food and feeding stuffs</b>	41	58	54	32
<b>All business activities</b>	<b>2332</b>	<b>2207</b>	<b>1580</b>	<b>-32</b>

Source: CSO

### 3. Length of Haul

- 3.1. The length of vehicle hauls has also declined over the past two years, as illustrated in Figure 2. The total of all haul lengths have declined over 32 per cent in the past two years. The greatest decline occurred in trips of less than 50km which fell by over 39 per cent, followed by trips of 51-150km which fell by 30 per cent. It is possible that the decline in short haul trips is attributable to the overall decline in the construction sector, which would have largely consisted of short trip lengths.

Figure 2: Length of Haul 2006-2009



Source: CSO

3.2. Short trip lengths of less than 50km have consistently accounted for the greatest proportion of trips. In 2006, 52 per cent of all trips were in this category while in 2009 it accounted for 45 per cent. Trips in excess of 500km have increased consistently since 2006, and now account for over 9 per cent of all trips. Trips of this nature largely reflect international freight traffic.

Table 2: Proportion of Trips by Length of Haul

	Up to 50 km	51 to 150 km	151-500	Over 500 km	Total
<b>2006</b>	52.0	17.3	23.7	7.1	100.0
<b>2007</b>	50.7	17.8	23.2	8.3	100.0
<b>2008</b>	47.2	17.3	26.8	8.8	100.0
<b>2009</b>	45.2	18.3	27.3	9.2	100.0

Source: CSO

#### 4. National Traffic

4.1. Table 3 sets out the freight vehicle kilometres originating and terminating in the regions. As the table highlights, vehicle kilometres in the regions has declined significantly over the 2007-2009 period. The greatest decline in kilometres occurred in the Border region which fell by 37.8 per cent since the peak of 2007.

4.2. This was followed by the Midlands and the Mid-West regions which fell by 37.7 and 36.9 per cent respectively. The Mid East region experienced the smallest fall in vehicle kilometres, with a decline of 29.5 per cent.

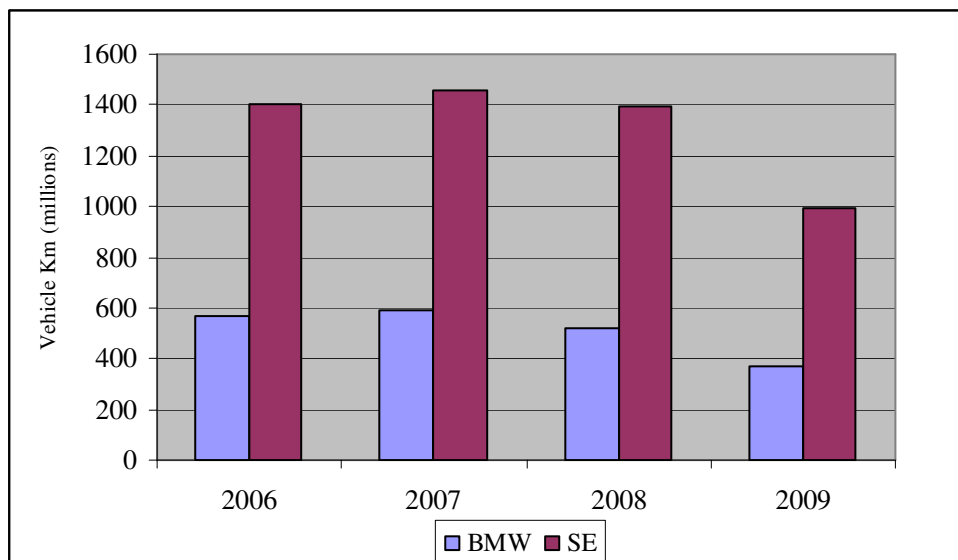
Table 3: Vehicle Kilometres Originating & Terminating in the Regions

Year	Border	Midland	West	Dublin	Mid-East	Mid-West	South-East	South-West
2006	227	136	206	398	214	197	286	308
2007	238	146	206	407	217	214	287	334
2008	200	141	176	413	214	184	265	317
2009	148	91	133	283	153	135	201	220
<b>(%) Change 07-09</b>	-37.8	-37.7	-35.4	-30.5	-29.5	-36.9	-30.0	-34.1

Source: CSO

- 4.3. Both the Southern Eastern and Border Midlands and Western regions have experienced a decline in vehicle kilometres in recent years. The fall has been more severe in the BMW which fell by approximately 37 per cent, compared to the SE which fell by 32 per cent.

Figure 3: Vehicle Kilometres by NUTS 3 Regions 2006-2009



Source: CSO

## 5. International Traffic

- 5.1. International trips carried out by Irish registered vehicles are largely accounted for by trips to the UK. Table 4 provides a matrix of kilometres travelled by Irish registered vehicles detailed by country of origin and country of destination in 2009.

5.2. The Table shows that in 2009, 52 million vehicle kilometres or 3.6 percent of vehicle kilometres originating in Ireland are destined for the UK market. Only 2.7 per cent of vehicle kilometres were destined for all other international countries. The Table also shows that 51 million vehicle kilometres originating in the UK are destined for Ireland, representing 65.4 per cent of all vehicle kilometres originating in the UK by Irish registered vehicles.

Table 4: Vehicle Kilometres of Irish Registered Vehicles detailed by Country of Origin & Country of Destination 2009

Country of Origin	To Ireland		To UK		To Other	
	mvkm	(%)	mvkm	(%)	mvkm	(%)
<b>Ireland</b>	1364	93.7	52	3.6	39	2.7
<b>UK</b>	51	65.4	23	29.5	4	5.1
<b>All Countries</b>	1439	91.0	88	5.6	53	3.4

Source: CSO

5.3. Vehicle kilometres to the UK have declined in recent years. Figure 4 details the percentage change in vehicle kilometres originating in Ireland and destined for the UK and Ireland over the 2007-2009 period. The table shows that international traffic has declined at a slower rate than domestic traffic. In 2009, vehicle kilometres to the UK fell by 17.5 per cent compared to a 28.7 per cent decline in domestic kilometres.

Figure 4: Percentage change in vehicle kilometres to Ireland and the UK





## **6. Conclusion**

- 6.1. Freight Activity in Ireland is in decline. This has been evident for the past two years. The number of freight vehicles has dropped over 10 per cent while vehicle kilometres travelled have fallen over 32 per cent since 2007.
- 6.2. This decline in vehicle kilometres is largely attributable to the downturn in the economy and particularly the fall off in construction activity. Building and construction, manufacture of glass, cement and clay products and mining and quarrying activities experienced the largest decline in vehicle kilometres.
- 6.3. In addition, short trip lengths, less than 50km, have declined most significantly. Again this reflects a fall off in domestic activity in the economy. On the contrary, the proportion of trip lengths over 500km has increased to over 9 per cent.
- 6.4. Nationally, vehicle kilometres have declined significantly in the BMW region, down 37 per cent since 2007. Vehicle kilometres in the Southern and Eastern regions have also declined, however not to the same extent as the BMW. International trips by Irish registered vehicles are predominately to the UK.
- 6.5. As short haul freight traffic has declined more sharply than long haul the decline of freight traffic on national routes is likely to have been less than for the road network as a whole. This is likely to be particularly true of the major national routes connecting Dublin, as international freight traffic volumes have not declined as much as all freight traffic.