



An Roinn Iompair
Department of Transport

Road Haulage Strategy Annual Progress Report 2023



Prepared by the
Department of Transport
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Road Haulage Strategy Progress in Numbers



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42,782

Commercial Goods Vehicles >3.5 tonnes taxed in Ireland as end December 2023

55% licensed haulage,
45% own account operations

↑ up **2.5%** on 2022
(Source DVCS D)



29

EV trucks purchased with assistance from AFHDV grant
(Source ZEVI)

3,804

Road Haulage Operators licensed in Ireland

64% International

36% National

(Source RTOL)



23,615

Vehicles operating on haulage licenses in 2023,

↑ up **3%** on 2022
(Source RTOL)

47%

of national operators have just one HGV
(Source RTOL)



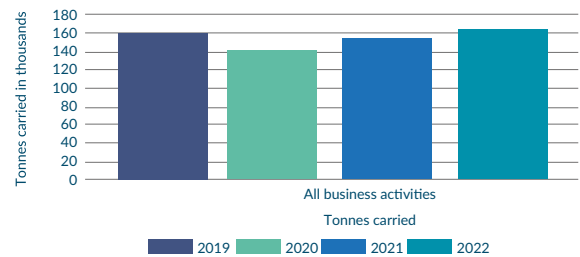
2,431

newly registered HGVs in 2023,

↑ up **18%** on 2022
(Source DVCS D)

Tonnage of goods transport by road 2019 – 2022

(Source CSO)



Licensed Haulage Support Scheme 2022 & 2023

(Source RTOL)

€15,66m paid
3,085 operators supported

€15,64m paid
2,828 operators supported

Diesel Rebate Scheme

25.6% increase in the number of Haulage claimants from 2021 to 2022 (Source Revenue)

46%* of licensed hauliers avail of the scheme.

Year	Licence type	No. of DRS claimants	No. of licensed hauliers	% of all licensed hauliers
2020	Haulage	718	3,787	19%
2021	Haulage	1,417	3,807	37%
2022	Haulage	1,780	3,838	46%

*DRS is available for vehicles >7.5t only

Road Freight Activity by Main Type of Work

(Source CSO)

Main work done by vehicle	Tonnes Carried (Thousand)	Vehicle Kilometres (Million)
All work done by vehicle	164,258	1,788
Carriage of.....		
Fertilisers, feedstuffs to farms	4%	3%
Livestock	2%	2%
Other farm produce	4%	2%
Delivery of goods to....		
Households	3%	6%
Retail outlets	11%	25%
Road works or building sites	41%	15%
Wholesalers	8%	15%
Delivery of materials and fuels to factories	10%	8%
Import/Export Work	8%	12%
Other work	10%	12%



Background

In December 2022, the Government published Ireland's Road Haulage Strategy 2022–2031, which is focused on improving efficiencies, standards, and helping the haulage and heavy goods road freight sector move to a low-carbon future.

The Strategy highlights the importance of the haulage and road freight sector and identifies 39 actions. These actions are split into 'Short-term priorities', which are expected to be completed in a 2–3 year timeframe, and 'Enablers for Medium- to Long-term progress', which will ensure the delivery of policy objectives over the full term of this Strategy.

The Climate Action Plan 2023 contains an action on the implementation of the Road Haulage Strategy (TR/23/9: Establish Road Freight Forum and advance Road Haulage Strategy decarbonisation work programme). This action also commits the Department of Transport to providing a report to the Minister on the progression of the actions in the Road Haulage Strategy by the end of 2023. In keeping with this, updates on these actions and details of the progress achieved in 2023 are noted below.

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Summary Update on Actions in the Road Haulage Strategy

Action 1

Establish a Road Freight Forum with representatives from relevant Government Departments, Agencies and the haulage, freight distribution and logistics sector.

Following the publication of the Strategy, the Road Freight Forum was established, with the first meeting held in February 2023. The National Transport Authority (NTA), the Road Safety Authority (RSA), Transport Infrastructure Ireland (TII), the Freight Transport Association Ireland (FTAI) and the Irish Road Haulage Association (IRHA) are all members of the Road Freight Forum, as are two academics and officials from the Department of Transport.

The Forum met two further times in 2023 (June and October). At these meetings the views and suggestions of Road Freight Forum members were invited and in many cases incorporated into the planned implementation of several Strategy actions, including on the proposed standards for eco-driving courses, the Longer-Semi-Trailer Trial and the provision of charging infrastructure for electric HGVs.

Additionally, a meeting was held in January 2023 with a wider group of haulage stakeholders to inform them of the content of the Road Haulage Strategy and the plans for the implementation of the Strategy's actions. It is envisaged that these wider stakeholder meetings will take place on an annual basis, with the next meeting taking place at the end of January 2024.

Action 2

Commission a study to establish current data availability and quality, identify key data gaps and explore at a high level how these might be filled.

Following a procurement process the Department of Transport signed a contract with Indecon International Economic Consultants to assess current data sources on road freight and the quality of data available, which is an important action to help support evidence-based policymaking. The study will explore at a high level how identified data gaps could be filled and the instruments and bodies that could be used to hold data. Furthermore, it will benchmark Ireland's data availability to international standards and will identify and describe relevant projects and pilot schemes which have taken place internationally to improve data quality and access for policy makers. Indecon has completed preparatory work on this study, including holding a consultation session with stakeholders, and is currently drafting the report, which should be received by the Department in January 2024

Action 4

Advocate for and support EU regulations that promote more stringent HGV vehicle emission standards.

Ireland has been active at EU level in promoting greater climate ambition on legislation that will reduce emissions from Heavy-Duty Vehicles (HDVs). On the proposed Euro 7 standards, which cover non-CO₂ vehicular emissions such as NO_x emissions and particulate matter from tyres, Ireland supported the European Commission's proposals for stricter limits for emissions testing for HDVs. While many of these ambitious measures were not included in the General Approach that was reached on this file Ireland was pleased that limits for non-exhaust emissions, such as particulate matter emissions from tyres will now be included.

The General Approach that was reached in October on CO₂ emissions standards for HDVs did preserve the Commission's CO₂ emissions reductions targets, which Ireland had strongly advocated for. Strengthened CO₂ emission performance standards for new heavy-duty vehicles will require manufacturers to produce cleaner vehicles and provide the Irish consumer with greater choice in the low/zero emission market.



Action 5

Establish a national certification system for eco-driving courses. Consider mechanisms/incentives for operators to adopt and maintain eco driving practices, including potential integration into the Driver CPC programme.

Following discussion and consultation with stakeholders at the Road Freight Forum, the requirements for the project to establish a national certification system for eco-driving courses were agreed. A Request for Tender document was published on 15 December. This project will also look at measures and incentives to improve the uptake of Eco-Driving courses and will assess international best practice.

Action 6

Complete study examining the feasibility of Freight Consolidation Centres to consolidate and rationalise freight transport & identify next steps.

Two separate studies have been completed on the feasibility of freight consolidation centres since the publication of the Road Haulage Strategy. In addition to the National Transport Authority (NTA) study, which was the subject of this Action, Transport Infrastructure Ireland (TII) also completed a freight consolidation study in 2023. Both of these have been received and analysed by the Department of Transport and it has been agreed with the NTA that four types of consolidation centre have the potential for pilot projects and will be subject to a further, more detailed feasibility study. These four types are: Distribution Centres operated by zero emission vehicles, Consolidation Centres for the construction sector, the use of micro-hubs in urban environments and the use of decoupling points, where a cargo load is switched to a zero-emission vehicle before entering an urban area.

Action 8

Launch a call to the private sector re specific transport operations which may be suitable for a Longer Semi-Trailer Trial.

Following discussions with the Road Freight Forum, a survey was sent out by the Department to the private sector asking road freight companies to express their interest in participating in a possible trial of longer semi-trailers. This survey period closed in September and the responses were analysed by the Department. Following further consultation with the Road Freight Forum, which showed considerable interest in a trial, it was agreed that the Department would provide a detailed proposal for a pilot of the Longer Semi-Trailer Trial at the next meeting of the Forum in Q1 2024.

Action 11

Support ZEV1 office work on infrastructure, energy and AFIR requirements from the perspective of heavy goods freight, leading to the 2025 EV Infrastructure Strategy Review which will determine optimal interventions to facilitate and enable the provision of charging infrastructure for HGVs.

A draft of the National En-Route Electric Vehicle Charging Network Plan was published for public consultation in September 2023. This Network Plan is the first element of the National Electric Vehicle Charging Network Plan which will cover all publicly accessible electric vehicle charging, including charging for HDVs. This phase of public consultation closed in November and the submissions received are now being reviewed by ZEV1. In addition, a Subgroup dealing specifically with the charging infrastructure needs of heavy-duty vehicles has been formed and held its first meeting in November. The group will seek to identify the challenges and opportunities in the transition to electric for the freight and heavy-duty vehicles sector.

Action 14

Develop a national Hydrogen Strategy, including consideration of how hydrogen can play a role in the decarbonisation of heavy goods road freight

The National Hydrogen Strategy was published in July 2023 by the Department of the Environment, Climate and Communications (DECC). Though the use of hydrogen in road transport is expected to be limited before 2030 due to the slower pace of technological advancements in this area when compared to battery electric vehicles, the Strategy recognises that hydrogen could play an important role in the decarbonisation of road freight transport, especially in certain areas where batteries may not be the most appropriate technological solution.

Action 17

Ensure the infrastructure strategy for the national road network, National Roads 2040, takes account of the needs of the haulage and road freight sector.

National Roads 2040 was published in April 2023 and recognised the importance of the National Road network for the movement of goods around Ireland. The strategy's freight-related commitments include recognising the need to provide quality services and secure parking areas for HGV drivers as well as consideration of prioritisation measures to increase freight transport efficiency such as dedicated freight lanes. The strategy also emphasises TII's role in managing traffic on congested sections of the national road network, which will have a particular impact on minimising carbon emissions from freight, and the support of TII for the development of multi-modal freight distribution centres on the network.

Action 19

Map the current infrastructure available to haulage and freight including rests stops and refuelling stations and identify priority projects for advancement.

This action is tied to the finalisation of TII's Motorway Service Area Policy, which was published in December. It includes a Communication Policy which proposes a consolidation of information on service areas, including available parking infrastructure, into a single, easy-to-use app and webpage.

There are several other measures in the Service Area Policy that will have an impact on HGV drivers. One key example of this is the update to the policy on lay-by areas, which will now be closed to private motorists except in the event of an emergency and will be only accessible to professional drivers. Additionally, the Service Area Policy includes a commitment to review safe and secure parking standards for HGVs, in order to bring them in line with Ireland's future obligations under EU law to provide Safe and Secure Parking Areas on the TEN-T network for commercial drivers. The MSA policy notes that TII may identify the potential to develop a pilot scheme for Safe and Secure Parking Areas for the haulage and road freight sector at an online service area.



Action 22

Complete All Island Strategic Rail Review and consider future strategic use of rail network for freight.

The All-Island Strategic Rail Review is being undertaken by the Department of Transport in cooperation with the Department for Infrastructure in Northern Ireland. It will inform the development of the railway sector on the Island of Ireland over the coming decades.

The Review is considering the future of the rail network with regard to the following ambitions: improving sustainable connectivity between the major cities (including the potential for higher/high-speed rail), enhancing regional accessibility, supporting balanced regional development, and rail connectivity to our international gateways. This includes the role of rail freight and consideration of the growth potential of the rail freight market.

Work on the Review is now at an advanced stage and a draft report was published for the purposes of Strategic Environmental Assessment (SEA) public consultation in July. The public consultation phase of the SEA process concluded on 29th September and submissions are now under review by the Project Team and officials from both jurisdictions. Following the SEA process and finalisation of the report, it is expected that it will be submitted for the approval of the Minister for Transport and Government in Spring 2024. A prioritisation/implementation strategy will be developed with EIB/JASPERS assistance.

Action 25

Ensure that the road freight sector and its importance for Ireland is considered as part of all transport strategy documents and policies, including the new National Ports and the review of the National Aviation Policy.

As a commitment under the Climate Action Plan 2023, the Department is developing a National Demand Management Strategy which aims to reduce kilometres travelled by 20% by 2030. As part of this work, a cross-Governmental Steering Group was established and includes representation and active engagement from the Road Freight Policy Division. Road freight will part of this 20% reduction target and as such, a subgroup of the Steering Group was established to explicitly examine how we can reduce vehicle kilometres travelled in the road freight sector. Road freight industry representatives are included in this Sub-Group and have been actively involved in progressing this work stream, developing a subgroup report and proposing recommendations for the National Demand Management Strategy. Measures examined and recommended include the use and expansion of consolidation centres, particularly for the construction sector, the consolidation of procurement within organisations, kerbside management programmes and a potential move of road freight to rail where possible.

Action 28

Review the content of the driver CPC with a view to reforming the programme to ensure it remains relevant and useful for drivers.

The review of module 2 has been completed, the final amendments have been made, all QR codes have been added and the material is currently being published to the Driver CPC Trainer portal. Trainers have familiarised themselves with the new material and the new module went live for drivers with effect from Monday 22 of January.

RSA are due to circulate comms to all CPC Training Organisations before year end regarding the review of module 1. The review team for module 1 is due to be in place by the end of January.

The Road Safety Strategy review of the accessibility of Driver CPC is ongoing, RSA is currently reviewing certified equivalent qualifications which may entitle drivers to an exemption for certain Driver CPC Training modules.



Action 31

Implement an Electronic Data Capture solution for recording inspection activity.

RSA has commenced a project which will transform the way enforcement services are delivered. By mid-2024, the RSA will move to electronic data capture for all inspection types, meaning an end to paper-based recording of inspections and subsequent manual entry into the Commercial Vehicle Information System (CoVIS) database. Work is progressing well on this project.

The requirements gathering phase has been completed and development work has started. A trial of potential devices to be used by RSA officers has also commenced and is expected to have now concluded.

Action 32

Implement the EU Mobility Package.

The EU Mobility Package I is a suite of EU legislation adopted in 2020 aimed at tackling key challenges affecting the EU transport sector. It consisted of 2 Regulations and a Directive. The policy intent and current transposition status of each is outlined briefly below:

Directive (EU) 2020/1057 introduced specific new rules on the posting of drivers in the road transport sector and updated the minimum requirements for the enforcement of certain social legislation in the road transport sector. The rules, in general, entitle drivers to minimum levels of conditions and pay depending on the Member State where they are working. The Directive was transposed in 2022 via 3 S.I.s, which were completed in conjunction with the Department of Enterprise, Trade and Employment.

Regulation (EU) 2020/1055 updated 2 existing EU Regulations and introduced a number of revised and new conditions governing access to the occupation of road transport operator and access to the road transport market (i.e. cabotage rules). The Regulation was transposed in April 2023 via 3 S.I.s.

Regulation (EU) 2020/1054 updated 2 existing EU Regulations concerning driving time rules for commercial drivers and tachograph rules. The Regulation was transposed in November 2023.

Action 33

Finalise the review of the Transport Managers CPC regime and establish an implementation plan based on its recommendations.

The Department appointed Grant Thornton to undertake a review of the Transport Managers CPC programme, including an examination of best practice in other Member States and the provision of options and recommendations for the appropriate development of the programme in Ireland. Grant Thornton's final report on this review was submitted to the Department in March 2023.

The Department plans to implement a number of changes to the TM CPC programme following the Grant Thornton report, including the appointment of an examining/awarding body under formal contract following a tendering process. As an initial step, a Request for Information was published on eTenders in early November 2023, to be followed by a formal Request for Tender early in 2024.

Action 34

Deliver a new IT system for the processing of road transport operator licences to include digital and customer service enhancements.

The Road Transport Operator Licensing (RTOL) unit of the Department requires a new IT system to provide a stable national electronic register of commercial road transport operators, including online access for operators and interconnection to other systems.

RTOL collaborated with the Driver and Vehicle Computer Services Division (DVCS), who are the technical lead on the project, to complete the tendering, evaluation and awarding of a contract to replace the current RTOL IT Licensing System. Fujitsu were the successful bidder and were awarded the tender in December 2022. The initial project meeting took place in January 2023 and the Fujitsu team were mobilised. The Fujitsu development team and RTOL business users commenced the Design Phase on 28 February 2023. The Build Phase commenced on 8th May 2023 and is ongoing. The target go-live date is Q3 2024.

Action 36

Conclude consideration of potential for license exchange agreements with North Macedonia and Argentina and commence consideration of further new agreements.

All EU driving licences are exchangeable when moving between Member States. For non-EU jurisdictions, Ireland may make bilateral agreements on licence exchange. Agreements can be made only when the authorities in each jurisdiction have studied and compared the licensing regimes, so that each side is satisfied that they are compatible to ensure the safety of road users. For Ireland, this is undertaken by the Road Safety Authority (RSA).

After considering all relevant details, the RSA recommended that Ireland should not enter into an exchange agreement with Argentina.

However, the RSA recently recommended that Ireland enter into a licence exchange agreement with North Macedonia and work is ongoing on drafting a Memorandum of Understanding (MoU) between the two countries. Once this MoU has been signed, the Department will begin preparing the relevant legislation for the Minister's signature. Furthermore, the RSA has finalised an MoU for an exchange agreement with Georgia and the Department is in the process of drafting legislation to give effect to it. The RSA has begun the negotiation process with Bosnia & Herzegovina.

Action 37

The LSCSG will organise an inaugural Skills Week for the Logistics and Supply Chain sector.

In 2023, the Logistics and Supply Chain Skills Group successfully organised Ireland's first ever Logistics and Supply Chain Skills Week, which was held from 27 March to 01 April. The objective of the Logistics Week was to promote the logistics and supply chain sector to students, potential new entrants, and career changers, as well as to engage supply chain executives on the skills needed in the sector now and into the future.

The Week was formally launched by Jack Chambers, Minister of State with special responsibility for International and Road Transport and Logistics, in Rosslare Europort and featured over 30 online and in-person events, which were held at venues across the country.

Following the success of the inaugural Logistics and Supply Chain Skills Week, the second Logistics Week will take place from Monday 26 February to Saturday 02 March 2024.



Priorities for 2024

Looking forward to 2024, the priority Strategy actions for implementation include:

- (Action 5) Completing the procurement process for national standards for eco-driving
- (Action 9) Examining policy actions, including funding supports, that could help to reduce carbon emissions through increased operational and digital efficiencies
- (Action 37) Logistics and Supply Chain Skills Week 2024 will be taking place this year. A Logistics and supply chain expo event aimed at Transition Year students is scheduled for the National Indoor Sports Arena on Friday 1 March
- (Action 6) Additionally, feasibility studies for Freight Consolidation Centres will be further progressed, with a view to deciding on the establishment of a number of pilot projects
- (Action 13) The work of ZEVN on the National En-Route Electric Vehicle Charging Network Plan, including further meetings of the HDV Subgroup, will continue to be a priority action into 2024 and beyond

Implementation of all Strategy actions will continue to be monitored by the Road Freight Forum, which is scheduled to hold its next meeting in Q1 2024.

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