Managers Guide to Distribution Costs 2021

FTA Ireland

BWG FOODS

ENPROVA
IRELAND'S ENERGY CIRCLE

HARRIS GROUP

Analytiqa

Contents

Foreword 4
Introduction 7
Methodology and Respondents 9
Headline Costs 11
Finance 15
Fleet and Transport Costs 22
Procurement, Energy and Eco-training 31
Employment, Wages and Training 43
Market Data Appendix 55
Fleet Population 56
Fleet Ages 58
Fleet Fuel Types 60
Fleet Licences and Sizes 61
Motor Tax Rates 63
Inflation 64
Fuel Costs 65
Further Information and Feedback 67

Foreword

I am very pleased to introduce the third edition of the Freight Transport Association of Ireland (FTAI) Manager's Guide to Distribution Costs, which will help the freight transport, distribution and logistics sector to benchmark the costs of doing business.

The publication of this third guide is significant because it provides the first opportunity for the sector to compare costs experienced during the COVID-19 pandemic across years. Much of the data and feedback provided by respondents for last year's Guide reflects the beginning of the COVID-19 pandemic and thus this year's Guide provides the basis for tracking the impact of the pandemic on costs over time. More generally, the Guide provides a great deal of information on operations, labour and finance, and will be very beneficial to companies of all sizes operating in the sector, helping them to better understand the costs of doing business.

The past 18 months have presented many difficult challenges for road transport operators and the wider logistics sector. During the initial stages of the COVID-19 pandemic, the sector faced unprecedented challenges, such as significant delays at international borders, temporary closures of businesses in Ireland and overseas, and major supply chain disruptions. However, the responsiveness of Ireland's freight transport, distribution and logistics sector to these challenges highlighted the resilience and interconnectedness of the sector, as well as the hard work and determination of those working on our roads and in our transport hubs every day.

The sector's contribution to keeping both national and international supply lines open during the pandemic has highlighted its importance and, deservedly, the sector has been in the spotlight. Our society has a newfound understanding of the importance of this sector, in all that it does, from stocking our supermarkets and retail shelves to transporting vital medicines and PPE. I wish to thank everybody working in the sector for all of their ongoing efforts.

The pandemic continues to present challenges to international supply chains as global economies emerge from COVID-19. Alongside this, the end of the Brexit transition period has also caused disruption to normal trade flows as businesses adjust to the effect of the UK becoming an EU third country.

In the road haulage sector, use of the UK landbridge has declined as a direct consequence of Brexit, while the use of direct Ireland-EU routes has significantly increased. Other factors, such as general labour market disruption, acute container shortages and rising freight costs are also affecting global supply chains.

The Programme for Government, "Our Shared Future", includes a commitment to publish and implement a 10-year strategy for the haulage sector focused on generating efficiencies and improving standards and helping the sector move to a low-carbon future. In April 2021, my Department launched a two-phase public consultation to seek views towards the development of this strategy. Then, in June 2021, my Department hosted a Haulage Strategy Webinar which brought together many stakeholders across freight, haulage, logistics and supply chain sectors, including those working in industry, further education, training and academia. Another public consultation will take place in the coming months, and I look forward to working further with the haulage sector on the development of this important strategy.

A significant decarbonisation of the road freight sector is essential to reduce transport emissions in line with climate action targets. The Government's new Climate Action Plan sets out important policies and targets for Ireland. A transition away from conventional fuels to cleaner alternatives is a necessary step if Ireland is to continue to decarbonise the transport sector. I was most heartened to read in this Guide that haulage operators are increasingly interested in alternatively-fuelled vehicles, particularly in the use of electric and natural gas vehicles. To promote the decarbonisation of the heavy-duty sector, my Department launched a new Alternatively-Fuelled Heavy-Duty Vehicle (AFHDV) Purchase Grant Scheme in March 2021. Given the excellent response to the initiative, my Department allocated additional funds this year to assist the heavy-duty vehicle sector in its transition to zero-mobility. The scheme will continue in 2022 with further funding available. This grant is intended to help bridge the cost differential between conventional and alternatively-fuelled vehicles and complements Government-supported programmes for the rollout of alternative fuel infrastructure.

Recognising the scale of the decarbonisation challenge facing the Irish haulage sector, my Department has also commissioned a number of studies to identify concrete actions that haulage operators and companies can take to reduce carbon and other emissions.

Sustainable practices, such as eco-driving, can work to reduce both fuel costs and emissions, whilst also improving road safety and providing upskilling opportunities for HGV drivers.

One of the main challenges currently affecting Ireland's freight transport, distribution and logistics sector is a shortage of available HGV drivers, a problem experienced throughout Europe. Road freight transport is increasing annually, while at the same time more HGV drivers are exiting the industry than entering it. The sector faces difficulties in recruiting and retaining drivers, particularly young drivers and female drivers.

I am committed to working with the sector, through the Logistics and Supply Chain Skills Group, chaired by my Department, to help alleviate the current difficulties in terms of labour supply and to promote careers, skills development and sustainable employment in the logistics and supply chain sectors in Ireland in the medium to longer term.

I would like to thank the FTAI and other organisations for their work on this guide, and the survey respondents for their participation and valuable contributions.

Hildegarde Naughton T.D.
Minister of State with responsibility for International and Road Transport and Logistics

An Roinn Iompair
Department of Transport

Introduction

FTA Ireland are delighted to introduce the third edition of the Manager's Guide to Distribution Costs 2021. This report is gaining traction and recognition as a 'go to' publication for transport managers and logistics business owners, whether it is for updating strategic plans, benchmarking salaries for drivers or transport managers, or assessing the comparative operational costs. The objective of this report is to be a resource that aids decision making and supports the industry in developing a clear understanding of their operational cost considerations and to assist companies through procurement processes as a good reference document. The survey in the first instance is detailed and requires time and attention and I want to extend a big thank you to all FTA Ireland members and other participant companies that have taken the time to complete it and provide their data. The information taken from industry leaders is essential to the success of reports like this, without engagement by the sector it stymies, learning and progression. Without reference material, all we have is anecdotal evidence, which is not what decision makers should base their future plans on!

It seems like it is a common and recurring statement to suggest that the freight distribution and logistics sector is facing many challenges, such as the post-Brexit trading environment, implications to the supply chain of the Covid 19 pandemic, global supply chain issues, rising fuel costs and a skills shortage. The Irish logistics sector have demonstrated that we are resilient, and extremely adaptable to all the challenges that we are faced with. In fact, it is my observation that we thrive when obstacles are put in our way, delivering innovative new ways of doing business, embracing technological advancements, looking to new markets and being leaders in delivering on our environmental obligations. It is my experience that FTA Ireland members are leading in this regard, and it is not surprising that so many are fully engaged in contributing to collaborative solutions that can alleviate pressure caused by some of the issues raised. Examples of this are where member companies, during their seasonal influenced quiet time, have offered their services and drivers to members that are struggling with resource issues. We also see members actively offering advice and guidance, collectively and collaboratively, through forums such as the FTA Ireland members alternative fuels working group, aiding the decision-making process and sharing learned experiences that support other members decision making. Our members are pro-actively involved in delivering skills shortage solutions and this is evidenced through participation in the 'Driver Apprenticeship' consortium that will deliver the first qualification on the National framework of qualifications (NFQ), a Level 6 Higher Certificate in Transport Operations and Commercial Driving, commencing online through ITSligo in January 2022. The Logistics Associate Apprenticeship, headed up by Anna Gorecka, goes from strength to strength and is attracting new entrants into the industry and supporting career progression opportunities for so many. There were over 90 new apprentices starting this programme in TUDublin and MTU in September 2021. So, whilst that are a lot of challenges, there is certainly a lot to be confident about looking to the future.

Inflation for 2020 was -0.33% which was -1.27% lower than 2019 and this is evidenced in this report by the reduction in operational expenses linked with fuel and maintenance costs. However, 2021 is painting a significantly different picture. In August 2021, the inflation rate for Ireland was 2.9%, increasing from -1.2% in September 2020. To take account of this extreme shift in inflation, we are including the results of additional research relating to driver shortages and driver salaries in this year's report. As normal, we will report on the average salaries for drivers, but in addition to the year-on-year increase, we will also be reporting that in the period up the end of August 2021, driver salaries have increased by approximately 13.0% when compared to period covered in this report.

Understanding the influencers pertaining to distribution costs is essential in developing robust strategic plans that reduce the risk of being taken off guard by sudden shocks to the supply chain that could have a negative impact on your business. This is reasonable advice in normal times! We have seen that Covid19 has re-written the rulebook somewhat. However, the basic principles remain. Businesses that put an emphasis on understanding their costs, prioritise profit over turnover and support good welfare practices and terms and conditions for their employees are more prepared for shocks to the environment in which they work.

FTA Ireland continue to work tirelessly on behalf of our members to gain recognition for compliant and safe commercial fleet operations, and work collaboratively with stakeholders to deliver solutions for the skills shortage, and to represent our members interests to Government in a productive and constructive manner.

Sincere thanks to our partners in this project, HARRIS GROUP; ENPROVA; BWG supported by the Department of Transport. We would like to extend our appreciation to all that have participated with Analytiqa in the survey for their time.

Aidan Flynn
Chief Executive
E: aflynn@ftai.ie
T: 01 844 7516

Vehicle Inspection Service

FTA Ireland Celebrating 10 years

FTA Ireland's Vehicle Inspection Service (VIS) offers a wide range of services from inspections to training and auditing. Carried out on all types of vehicles including heavy goods vehicles, passenger carrying vehicles, vans and specialist vehicles, these inspections will provide peace of mind that you are complying with your legal undertakings, qality monitoring any maintenance providers and procedures, and in many cases will save you money.

Benefits of FTA Ireland's VIS

- Being at the forefront of industry developments, and a wealth of experience, has provided FTA Ireland with the tools to offer a wide range of inspections and audits, carried out by highly skilled engineers.
- Proven reductions in defects, prohibitions and repairs which in turn can produce significant cost savings.
- Peace of mind that your maintenance providers are protecting your interests and giving good value.
- Access to the wealth of knowledge that we have accrued from years of experience in the industry.
- A range of reports that can be tailored to suit your individual operational requirements.
- FTA Ireland's influence and position within the industry, which ensures all work is carried out in accordance with the latest industry developments and legislation.

VIS services by operation

Commercial Vehicle Inspections

A variety of inspections of your vehicles are available to help ensure safety, compliance and reduced downtime due to faults including roadworthiness, maintenance, pre-purchase due diligence inspections and inspections of lifting equipment (Loler).

Passenger Carrying Vehicle Inspections

A variety of passenger vehicle inspections to help ensure safety, compliance and reduced downtime due to faults.

Lifting Equipment Inspections

In addition to our regular Roadworthiness Inspections, FTA Ireland engineers can also carry out a full visual, operational and mechanical inspection of any lifting equipment including tail lifts, bin lifts and demountable body systems.

Driver Walk Around Check Audit

A Driver Walk Around Check Audit provides an independent stop and check at random on vehicles that are about to exit your premises.

These checks will enable you to quality monitor the competency of the drivers carrying out their routine checks and the number of driver detectable defects going unnoticed.

01 8447516 info@ftai.ie www.fta.ie

Methodology and Respondents

Now in its third year, the 'Manager's Guide to Distribution Costs' has been established to benefit the operational, commercial and strategic plans for any organisation with an interest in logistics, supply chain and, more specifically, road transport across Ireland.

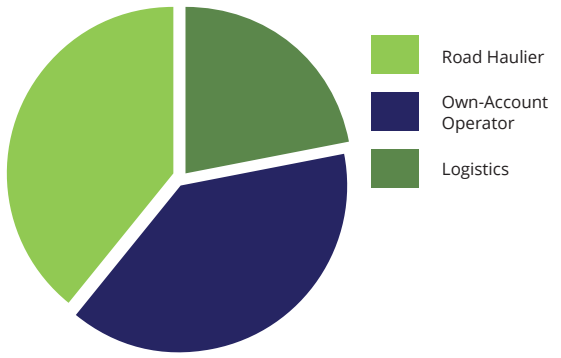
Research was undertaken by Analytiqa in the second and third quarters of 2021. Despite the significant operational challenges facing supply chains this year, the number of respondents achieved was in line with our inaugural 2019 and 2020 reports. Once again, to ensure strict confidentiality and independence, only Analytiqa has access to individual company responses and the operational data they provided.

Participating companies of all sizes manage and / or sub-contract transport fleets both domestically and internationally, encompassing own-account operators and third-party service providers.

Our respondents were broadly classified in three groups, as logistics operators, road hauliers or manufacturers and retailers.

Research respondents by category

Research Respondents	2018	2019	2020
Logistics	23.5%	27.3%	22.2%
Own-Account Operator	17.6%	18.2%	38.9%
Road Haulier	58.9%	54.5%	38.9%
Total	**100.0%**	**100.0%**	**100.0%**



Over one-third of our respondents (38.9%) provide haulage services to customers (including sub-contracted services to other logistics and transport companies), with the same share managing fleets as own-account operators. Just over one-fifth (22.2%) of respondents are described as logistics companies. The transport fleets operated by our research respondents support a significant share of Ireland's economy, across a wide variety of industries, including the automotive, construction, consumer goods, food and drinks, industrial manufacturing, pharmaceutical and healthcare, retail, technology, utilities, energy & waste sectors.

In line with the previous editions of our report, the fleet sizes of our respondents, and the distances they travel, remain higher than one might expect from the industry average. Understanding this will help provide context for the analysis included throughout this report. The market data appendix at the end of this report provides a series of data points to support our research findings. Included amongst these are average fleet sizes.

Whilst we remain in the early stages of the lifecycle of this report, in just its third edition, there will inevitably be some disparities between 2018, 2019 and 2020 data, largely due to the differences in the number and composition of respondents each year. For this reason, we have largely avoided the calculation of growth rates between periods, instead focussing on a more holistic approach. However, across the 85+ charts and data tables in this year's report, it is clear to see some consistent trends emerging.

Respondents' Operating Attributes	2018	2019	2020
Respondents average fleet size (vehicles)	31.5	22.1	36.3
Respondents average distance travelled per vehicle (all truck types) per year, km	99,526	85,876	96,366
...equating to a distance per 'working day' of (excl. Sundays and Bank Holidays), km	328.5	284.4	319.1

Fleet managers, take the uncertainty out of fuel prices.

Talk to Emo today about our fixed price fuel options.

Recent global events have demonstrated the volatility of the oil market and the unexpected circumstances that can suddenly impact on price.

So, if fuel is a key component of your business costs, it's time to consider our Fixed Price Contract offering.

Fixed Pricing is a method of hedging your exposure to fluctuating fuel prices, bringing predictability to your business costs and protecting budgets for the period of the contract.

An Emo Fixed Price Fuel Contract* can secure your business against future market variations by locking in your fuel price for 1 to 18 months.

Why choose Fixed Pricing?

Issues with taking the Market Price	Benefits of Fixing Your Price
• Fuel prices constantly fluctuate, making costs unpredictable	• The variability is removed, you now know the price you are paying for fuel
• Your business is heavily reliant on fuel in its operations	• This significant element of your costs is now known based on the volume you anticipate using
• Fuel price volatility negatively impacts your budgeting activity	• Budgets can be more accurately set and more closely adhered to as a large unknown is gone
• Large increases in fuel prices may occur	• Insures against potential crippling increases in fuel prices which are outside your control

To find out more about how Fixed Pricing could benefit your business please contact:

Jerry Malee
Senior Commercial Sales Manager
087 921 8090
Jerry.Malee@emo.ie

Gemma Byrne
Commercial Sales
085 243 0739
Gemma.Byrne@emo.ie

www.emo.ie

Emo Oil Ltd is a subsidiary of DCC plc. DCC is a broadly based group, employing c 12,500 people across four focused divisions: DCC LPG, DCC Retail & Oil, DCC Healthcare and DCC Technology.

***Subject to contractual terms, minimum quantities apply**

Emo

Headline Costs

In this section, we provide an overview of a commercial vehicle operator's costs in Ireland, with a focus on business overheads, transport overheads, maintenance and fuel costs.

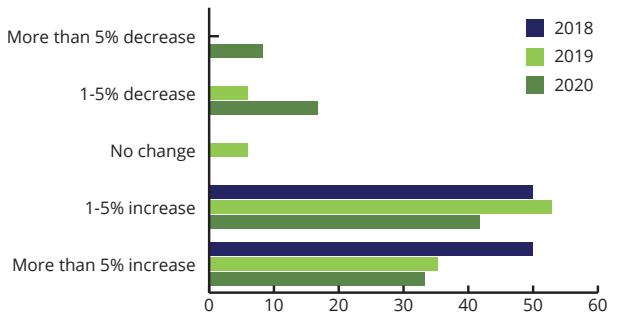
Business Overhead Costs

One-quarter of companies (25.0%) responding to our survey reported decreases in the total business overhead costs in 2020, up significantly from 2019 in a year that was dominated by the Covid-pandemic. Annual business overheads were defined as those involved in running the business, distinct from the costs involved in running the transport operation itself, and included, for example, the cost of renting office space, salaries of administration, sales, marketing and accounting personnel, and utilities bills such as water, electricity and gas etc.

The cost increases experienced by our respondents compares unfavourably with published rates of inflation in Ireland, which in 2018, were 0.5% and in 2019 was 0.9%. The annual average rate of inflation in 2020 was -0.3%. More details on inflation rates can be viewed in the market data appendix at the end of the report.

Change in business overhead costs

Change in Business Overhead Costs	2018	2019	2020
More than 5% decrease	0.0%	0.0%	8.3%
1-5% decrease	0.0%	5.9%	16.7%
No change	0.0%	5.9%	0.0%
1-5% increase	50.0%	52.9%	41.7%
More than 5% increase	50.0%	35.3%	33.3%
Total	**100.0%**	**100.0%**	**100.0%**
Average	**6.5%**	**5.9%**	**2.5%**



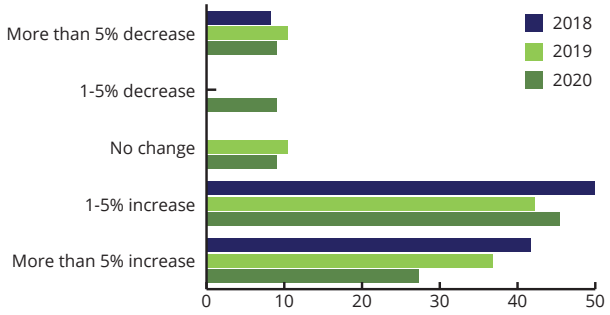
Transport overhead costs

For the first time in our report series, annual transport overhead costs increased at a faster rate than wider business overhead costs, at 3.6% per year. Transport overheads are those associated with the day-to-day running of the transport operation and include, for example, the transport manager's salary, despatch office running costs, tachograph analysis costs, maintenance of fuel storage tanks etc.

Over one-quarter of our respondents (27.6%) reported a drop in transport overhead costs in 2020. This should be placed in the context of the pandemic-hit year, that saw an 11.6% drop in road freight volumes and a 14.2% drop in distances travelled carrying freight by road in Ireland in 2020.

Change in transport overhead costs

Change in Transport Costs	2018	2019	2020
More than 5% decrease	8.3%	10.5%	9.1%
1-5% decrease	0.0%	0.0%	9.1%
No change	0.0%	10.5%	9.1%
1-5% increase	50.0%	42.2%	45.5%
More than 5% increase	41.7%	36.8%	27.3%
Total	**100.0%**	**100.0%**	**100.0%**
Average	**4.8%**	**4.4%**	**3.6%**



Haulage Rates

The increase in business and transport overhead costs should be placed in context with any increase in prices (rates) that service providers are able to achieve with customers. The average percentage change in domestic haulage rates achieved by our respondents in 2020 remains below the reported increases in operating costs.

Average change in domestic haulage rates:	2018	2019	2020
	3.0%	1.6%	1.6%

Almost four-fifths of our respondents (78.6%) consider themselves to be 'buyers' of haulage services, including companies that sub-contract work. Of these companies, just over one-third (36.4%) aim to boost the efficiency of their operations by making use of return load rates.

Buyers of haulage services	2020
Share of respondents acting as buyers of haulage services	78.6%
Use of Return Load Rates	36.4%

Almost two-thirds of our respondents classify themselves as providers of haulage services, including those that work as sub-contractors and / or own-account operators that may undertake some work for third parties. Of these companies, the average number of customers per company is just under 50, whilst over one-half (55.6%) offer return load rates to customers. 18.2% of respondents that are providers of haulage services undertake cabotage.

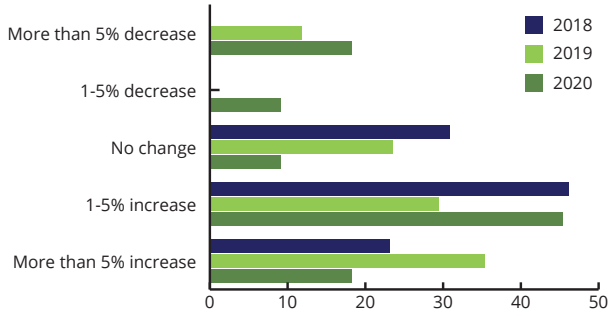
Providers of haulage services	2020
Share of respondents acting as providers of haulage services	64.3%
Provision of Return Load Rates	55.6%
Share of respondents acting as providers of haulage services undertaking cabotage	18.2%

Maintenance Costs

Less than one-in-five companies (18.2%) saw their commercial vehicle fleet maintenance costs increase by more than 5.0% in the last year, down significantly from 2019, with more companies experiencing smaller rates of increase. Over one-quarter (27.3%) saw a decrease in their costs, helping to explain the overall lower average cost increase in 2020. The rise in average overall costs and falling costs per vehicle are explained by respondents' increasing average fleet size as reported in the 'Methodology and Respondents' section above.

Change in maintenance costs

Change in Maintenance Costs	2018	2019	2020
More than 5% decrease	0.0%	11.8%	18.2%
1-5% decrease	0.0%	0.0%	9.1%
No change	30.8%	23.5%	9.1%
1-5% increase	46.2%	29.4%	45.4%
More than 5% increase	23.1%	35.3%	18.2%
Total	**100.0%**	**100.0%**	**100.0%**
Average	**3.8%**	**3.3%**	**1.3%**



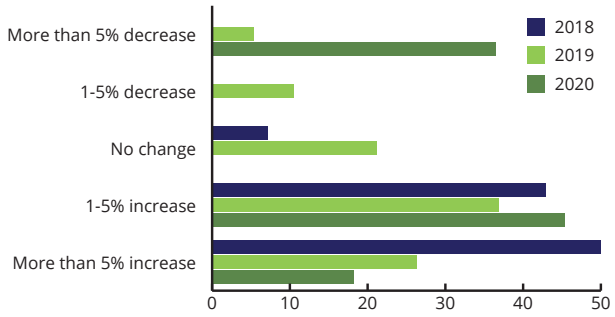
Average annual maintenance costs per vehicle for all commercial vehicle fleet:	2018	2019	2020
	€ 7,499	€ 7,746	€ 6,609

Fuel Costs

Almost two-thirds of companies (63.6%) reported an increase in commercial vehicle fleet fuel costs in the last year, with average annual growth amongst our respondents of 0.8%. At €0.33, average fuel costs per kilometre across commercial vehicle fleet operations was consistent with our findings in both previous reports. For further context, changes in retail fuel prices are provided in the market data appendix at the end of this report.

Change in fuel costs

Change in Fuel Costs	2018	2019	2020
More than 5% decrease	0.0%	5.3%	36.4%
1-5% decrease	0.0%	10.5%	0.0%
No change	7.1%	21.1%	0.0%
1-5% increase	42.9%	36.8%	45.4%
More than 5% increase	50.0%	26.3%	18.2%
Total	**100.0%**	**100.0%**	**100.0%**



Change in Fuel Costs	2018	2019	2020
Average change in annual fuel costs for commercial vehicle fleet	6.1%	3.3%	0.8%
Average annual fuel costs per vehicle for commercial vehicle fleet	€ 32,185	€ 34,483	€ 30,680
Average fuel costs per km for commercial vehicle fleet	€ 0.33	€ 0.33	€ 0.33
Average Fuel Consumption (Litres per 100 KM)	25.0	25.1	23.2

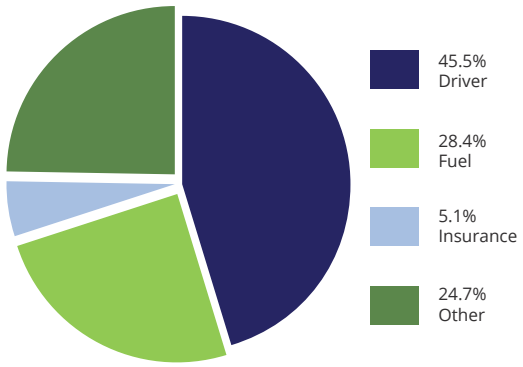
Average Annual Fuel (Price per Litre in March each year)	2018	2019	2020
	€ 1.33	€ 1.32	€ 1.33

Breakdown of Costs by Vehicle Type

The following tables and charts segment the annual operating costs of two types of commercial vehicle, identifying the share of costs allocated to drivers, fuel and insurance. The 'other' category covers additional vehicle (and trailer were relevant) costs associated including tyres, maintenance and deprecation.

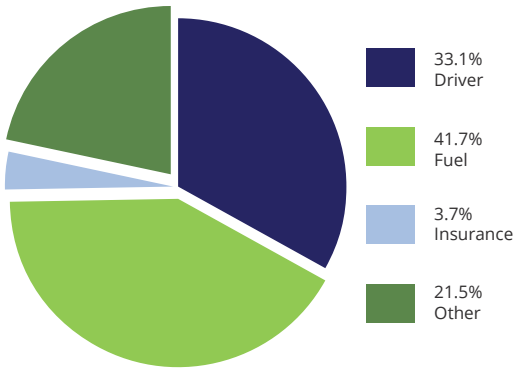
Rigid Vehicles 3.5 - 18.0 Tonnes GVW

Costs Breakdown: Rigid Vehicles 3.5 - 18.0 Tonnes GVW	2018	2019	2020
Driver	42.6%	43.6%	45.4%
Fuel	29.1%	27.5%	24.8%
Insurance	5.8%	2.9%	5.1%
Other	22.5%	26.0%	24.7%
Total	**100.0%**	**100.0%**	**100.0%**



46 Tonnes Articulated Vehicles

Costs Breakdown: 46 Tonnes Artic	2018	2019	2020
Driver	34.5%	31.9%	33.1%
Fuel	38.9%	42.0%	41.7%
Insurance	3.7%	4.3%	3.7%
Other	22.9%	21.8%	21.5%
Total	**100.0%**	**100.0%**	**100.0%**



Finance

Harris Group is leading the charge in the commercial Electric Vehicle market and is committed to providing cleaner, greener and more economical transport solutions. Adhering to our core values of Passion, Integrity, New Thinking & Openness, Harris Group is actively sourcing vehicles that contribute to our long-term goals of contributing to a greener future.

At Harris Group, we can provide an unbeatable choice of commercial electric vehicles to the public and private sector, including high range buses and vans.

Our History

The Harris Group was founded by the late Robert 'Pino' Harris (1942-2017), remembered as a pioneer whose legendary business acumen ultimately came to change the face of the transportation industry in Ireland.

His business breakthrough came in the 1960s through importing Japanese brand Hino, whose trucks soon gained a reputation for toughness and reliability, and earned significant market share. He subsequently grew the Harris brand portfolio to include Isuzu (1985) and Iveco (1994), dominating the heavy goods vehicles market.

In later years Harris Group activities grew significantly to include a wide range of light commercial offerings as well as a bus and coach division, with Pino Harris' commitment to innovation and exceptional customer service underpinning its success.

The Harris Group Today

The Harris Group is one of Ireland's leading importers and distributors of commercial vehicles for the construction, distribution and mass transportation industries.

Located on Dublin's Naas Road, our landmark business campus and showrooms is home to a huge range of vehicles as well as our state-of-the-art parts distribution centre, extensive workshop facilities and the only ISO-accredited KD assembly plant in Ireland and the UK for HGV & LDT vehicles.

Today, Harris Group operations encompass a global supply chain, a pan-European customer base and an extensive network of dealers, with a firm focus on technological innovation and the next generation of clean, sustainable motoring.

Our company is imbued with the values of innovation, integrity and exceptional customer service laid down by our founder, and embodied in the leadership of Denise Harris and the Harris Group executive team.

Harris Group
W: https://harrisgroup.ie/
T: 353 (1) 419 4500

In this section of the Manager's Guide to Distribution costs we analyse truck purchase and leasing costs and take a look at in-depth look at insurance, how and when commercial vehicle operators insure their assets, alongside the changing costs of doing so. Following on from our initial cashflow analysis last year, we also update our understanding of how fleet operators manage their cashflow, their anticipated capital expenditure plans and track how they organise their management planning processes.

Truck Purchase Costs

The following average purchase prices by types of vehicle were identified, based upon operators' most recent purchases after any discounts were applied. Reflective of our changing respondents' characteristics, truck purchase costs per vehicle declined in all three categories in 2020.

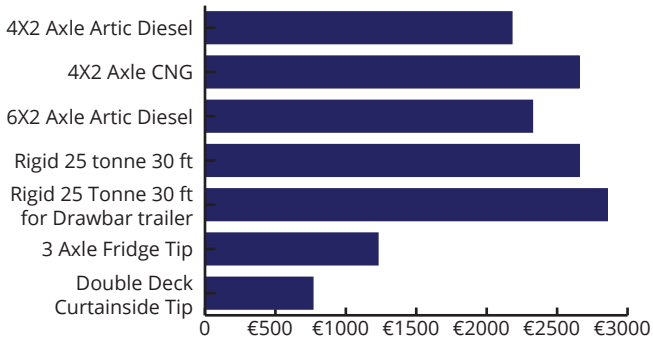
Truck Purchase Costs	2018	2019	2020
3.5 Tonnes Vans GVW	€ 28,903	€ 27,018	€ 24,253
Rigid Vehicles 3.5 - 18.0 Tonnes GVW	€ 76,836	€ 81,600	€ 72,664
46 Tonnes Articulated Vehicles (3 Axle Tractor Unit)	€ 98,203	€ 100,667	€ 93,000

Truck Leasing Costs

The truck leasing costs outlined below are calculated upon 100,000 km per year, with additional distance charged at rates of between 6.0% and 8.0%. Lease costs are inclusive of maintenance costs such as tyres, service, tax, CVRT testing and all repairs, but are exclusive of insurance and driver costs.

The costs outlined below are average costs and can be influenced in individual cases by variables such as customer relationships and volumes.

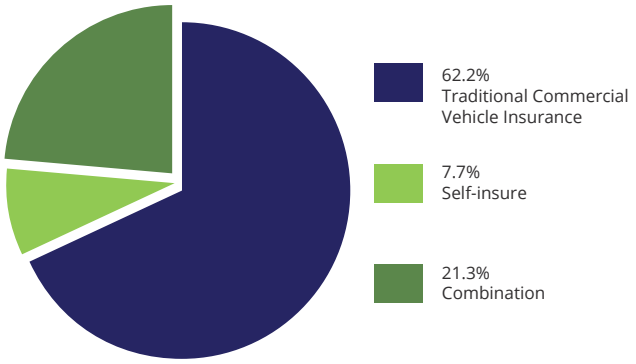
Average Costs per Vehicle per Month	2018	2019	2020
4X2 Axle Artic Diesel	€ 2,040	€ 2,075	€ 2,179
4X2 Axle CNG	€ 2,490	€ 2,530	€ 2,656
6X2 Axle Artic Diesel	€ 2,180	€ 2,215	€ 2,325
Rigid 25 tonne 30 ft	€ 2,495	€ 2,530	€ 2,657
Rigid 25 Tonne 30 ft for Drawbar trailer	€ 2,680	€ 2,720	€ 2,856
3 Axle Fridge Tip	€ 1,150	€ 1,170	€ 1,228
Double Deck Curtainside Tip	€ 720	€ 730	€ 766



Type of Motor Insurance

Over two-thirds of commercial vehicle fleet operators (69.2%) rely solely on traditional forms of insurance to safeguard their assets.

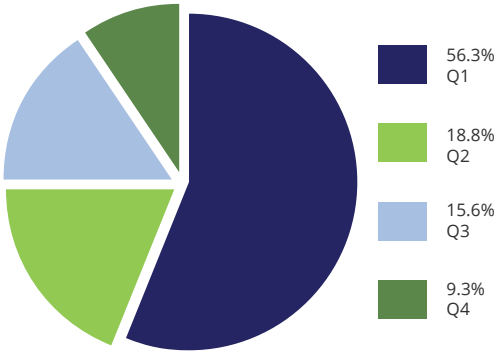
Type of Motor Insurance	2018	2019	2020
Traditional Commercial Vehicle Insurance	57.2%	68.4%	69.2%
Self-insure	7.1%	10.5%	7.7%
Combination	35.7%	21.1%	23.1%
Total	**100.0%**	**100.0%**	**100.0%**



Timing of Insurance Renewals

Three-quarters (75.1%) of commercial vehicle fleet operators insure their vehicles in the first half of a calendar year, with the majority electing to do so in the Q1 period.

Timing of Motor Insurance Renewals	2018	2019	2020
Q1	46.2%	52.9%	56.3%
Q2	23.1%	23.6%	18.8%
Q3	23.1%	17.6%	15.6%
Q4	7.6%	5.9%	9.3%
Total	**100.0%**	**100.0%**	**100.0%**



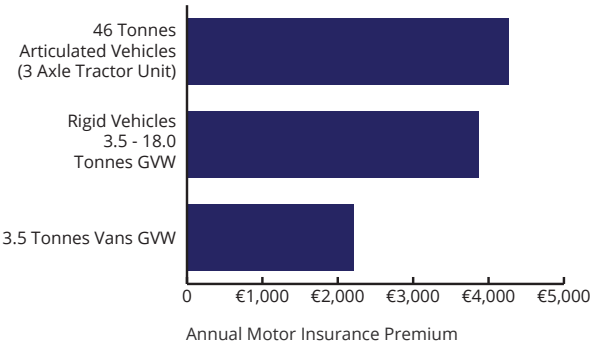
Motor Insurance Premiums

Commercial vehicle fleet operators were asked to provide details of their current annual insurance premium, or, if they self-insure, the amount that is set aside for their commercial vehicle fleet. Note that costs by vehicle type display fluctuations from year-to-year, which are explained by a different mix of vehicle types and business uses amongst respondents.

Average annual motor insurance premium per vehicle across all truck types:	2018	2019	2020
	€ 4,410	€ 3,586	€ 3,677

Average annual motor insurance premium per year per vehicle by vehicle type

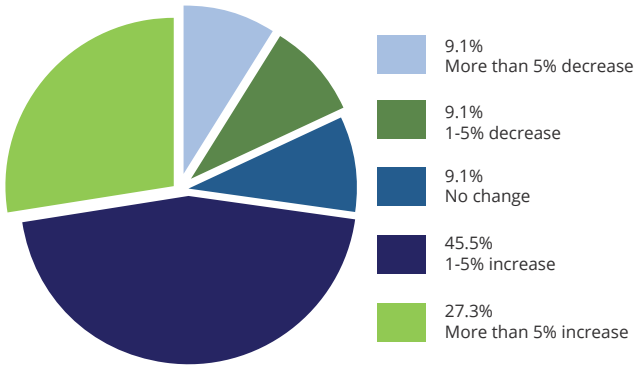
Annual Motor Insurance Premium	2018	2019	2020
3.5 Tonnes Vans GVW	€ 1,897	€ 2,667	€ 2,206
Rigid Vehicles 3.5 - 18.0 Tonnes GVW	€ 4,456	€ 2,344	€ 3,864
46 Tonnes Articulated Vehicles (3 Axle Tractor Unit)	€ 4,363	€ 4,827	€ 4,262



The insurance premiums highlighted above represent the averages submitted by our research participants this year and are reflective of their fleet characteristics. Van insurance premiums quoted to our research this year were as high as €2,400, whilst for rigids and artics, costs were as high as €4,500 and €5,750 respectively."

Almost three-quarters of commercial vehicle fleet operators (72.8%) reported an increase of more than 5.0% in their annual insurance premium at the time of their most recent renewal, up significantly from last year, whilst just under one-fifth (18.2%) reported a fall in costs.

Change in Motor Insurance Premiums	2018	2019	2020
More than 5% decrease	7.7%	12.5%	9.1%
1-5% decrease	15.4%	18.8%	9.1%
No change	15.4%	31.2%	9.1%
1-5% increase	7.7%	6.3%	45.5%
More than 5% increase	53.8%	31.2%	27.3%
Total	**100.0%**	**100.0%**	**100.0%**
Average	**3.9%**	**3.3%**	**4.2%**

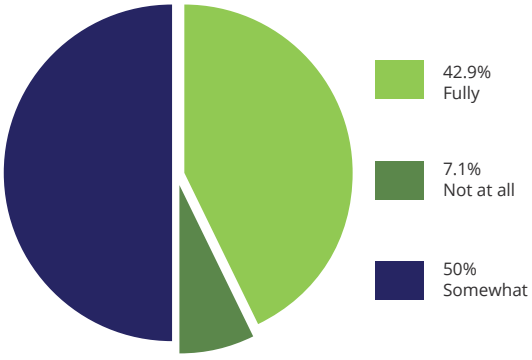


Financial and Strategic Performance

Following on from our initial research into the financial and strategic performance of fleet operators across Ireland last year, we once again take an in-depth look at companies approach to cashflow and working capital. Whilst marginally 'better' than last year, our analysis once again highlights significant room for improvement.

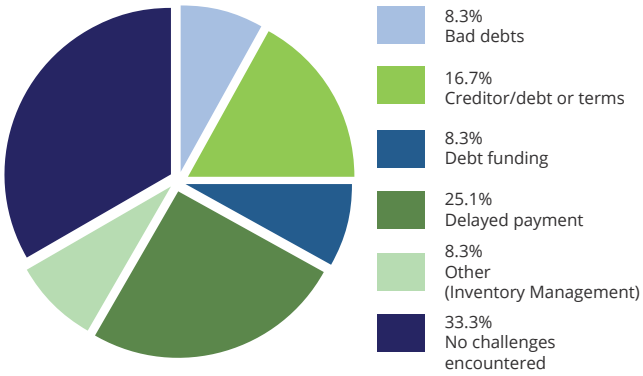
42.9% of respondents believe they fully optimise their working capital, an improvement from 36.4% last year. However, one-half (50.0%) admit they only partly achieve this.

Optimisation of Working Capital	2019	2020
Fully	36.4%	42.9%
Not at all	9.1%	7.1%
Somewhat	54.5%	50.0%
Total	**100.0%**	**100.0%**



Fleet operators face numerous cashflow challenges, with the biggest of these identified, once again, as managing delayed payments from customers. Managing creditor / debtor terms is the second most important challenge facing fleet operators. It is good to see that one-third of our respondents (33.3%) believe that they do not face any significant cashflow challenges.

Cashflow Challenges	2019	2020
Bad debts	9.1%	8.3%
Creditor/debtor terms	18.1%	16.7%
Debt funding	9.1%	8.3%
Delayed payment	27.3%	25.1%
Other (e.g. Inventory Management)	9.1%	8.3%
No challenges encountered	27.3%	33.3%
Total	**100.0%**	**100.0%**



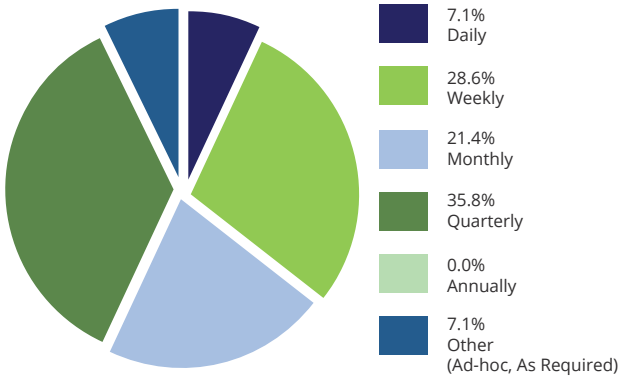
January is the most crucial time of the year for fleet operators managing their cashflow, with just under one-half (47.6%) reporting this as their most challenging time of the year. A further 19.0% of respondents face their biggest challenges in December.

Monthly Cashflow Challenges	2019	2020
October	0.0%	7.1%
November	0.0%	9.6%
December	28.6%	19.0%
January	57.1%	47.6%
February	14.3%	9.6%
March	0.0%	7.1%
Other	0.0%	0.0%
Total	**100.0%**	**100.0%**

Whilst it is pleasing to see that over 90.0% of fleet operators undertake staff scenario planning, over one-third (35.8%) undertake this only on a quarterly. It is more encouraging to see that 28.6% of companies manage staff scenario planning on a weekly basis.

Undertaking Staff Scenario Planning	2019	2020
Yes	81.8%	90.9%
No	18.2%	9.1%
Total	**100.0%**	**100.0%**

Frequency of Staff Scenario Planning	2019	2020
Daily	7.7%	7.1%
Weekly	23.1%	28.6%
Monthly	30.7%	21.4%
Quarterly	23.1%	35.8%
Annually	7.7%	0.0%
Other (Ad-hoc, As Required)	7.7%	7.1%
Total	**100.0%**	**100.0%**



Over one-half of our respondents report that they manage capital expenditure from their existing reserves. It is encouraging to note that after a fall in average capex in 2020, average planned expenditure amongst our respondents in 2021 is €425,714, which is on average, 6.4% higher than levels seen in 2020. The main priority for investment in 2021 is new equipment to facilitate business expansion, with a higher share of expenditure allocated to fleet investments.

Capex Funding	2019	2020
Reserves	57.1%	55.2%
Combination of reserves and debt	28.6%	27.6%
Asset lender debt	14.3%	17.2%
Total	**100.0%**	**100.0%**

Capex Growth in 2021	
Average Change in Expenditure in 2021 over 2020	6.4%
Average Expenditure planned in 2021	€ 425,714
Average Change in Expenditure in 2020 over 2019	-3.3%

Areas of Investment	2019	2020
New equipment to facilitate expansion	66.7%	63.6%
Fleet investment	22.2%	27.3%
Refurbishment of machinery	11.1%	9.1%
Total	**100.0%**	**100.0%**

LEADING

The charge in commercial EVS

SEE OUR RANGE OF ZERO EMISSION COMMERCIAL VEHICLE SOLUTIONS

HIGER

MAXUS

AZURE

STEED
FULL ELECTRIC BUS

MAXUS eDELIVER 3

MAXUS eDELIVER 9

HARRIS GROUP

HARRIS GROUP, NAAS ROAD, DUBLIN 12, IRELAND, D12 VO65

+353 (0) 1 419 4500
www.harrisgroup.ie

Fleet and Transport Costs

10 Year Haulage Strategy

The Department of Transport published the first strategy consultation for the Haulage sector in April 2021. The Programme for Government had committed to developing a 10-year strategy for the haulage sector with the aim to develop a strategy that will focus on generating efficiencies and improving standards, while helping to create secure employment and assisting the sector in moving to a low-carbon future.

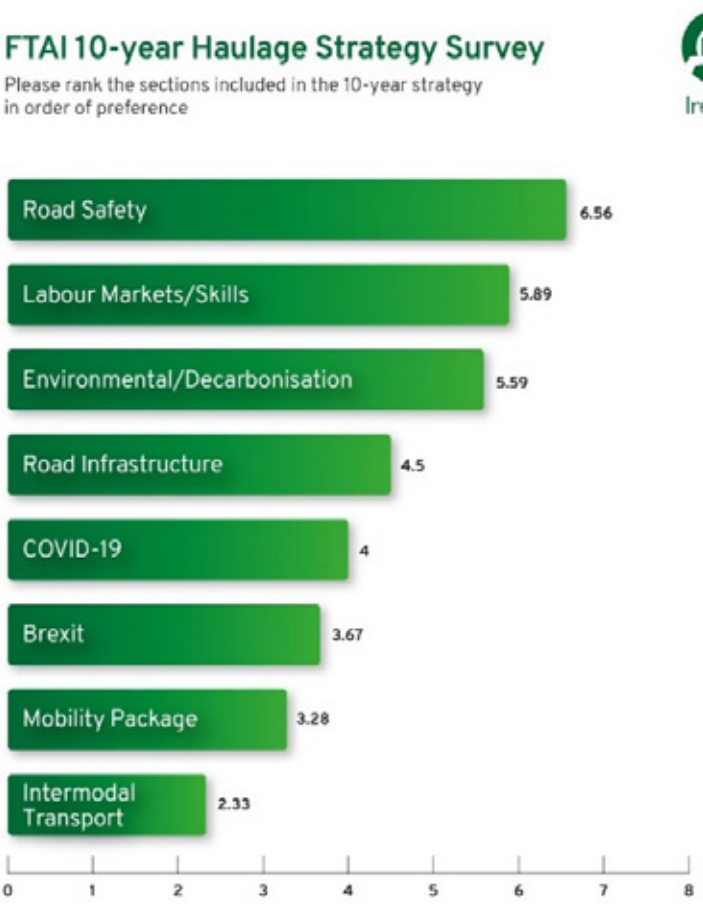
There are eight key areas seeking a response from industry:

- Road Safety
- Labour Market / Skills
- Environmental / Decarbonisation
- Road Infrastructure
- COVID-19
- Brexit
- Mobility Package
- Intermodal Transport

FTAI members ranked Road Safety as the number one issue for consideration, followed by Labour Market/Skills and Environmental/Decarbonisation issues as demonstrated in the graphic.

FTA Ireland sought the views of our members through the establishment of a working group and developed a detailed consultation document that was submitted for consideration to the Department of Transport in July 2021. A summary of the key recommendations from our submission are detailed in the following pages.

The consultation and the soon to be published strategy is a first for Ireland and it extends beyond the haulage sector to cover all those that operate fleets of commercial vehicles. FTA Ireland will engage with the Department of transport once they publish the strategy and have recommended that there are periodic reviews of the strategy progress.



10 Year Haulage Strategy

FTAI Key Recommendations

FTAI KEY GENERAL RECOMMENDATIONS

EMERGENCY PLANNING	BREXIT	BREXIT	EVALUATION
Creating a sub-group with representation from the freight distribution and logistics sector is essential in ensuring comprehensive preparations for, and response to, all emergencies.	There is a need for further integration and upgrading of systems across Government Departments / agencies in order to reduce the administrative workload on the haulage sector.	Develop strong maritimelinks closer to key European Strategic locations (France/ Netherlands/Belgium) is sensible and should be supported by Government policy.	As well as an annual progress report, there should be a mid-term evaluation of the strategy to provide an opportunity to assess and recalibrate priorities and targets.

FTAI KEY RECOMMENDATIONS

Environmental/decarbonisation

Infrastructural development is essential to increase the availability and accessibility of places to fuel/recharge.	The commercial transport sector is a multifaceted entity that needs clearer definition for the purpose of pursuing solutions that support a sustainable transition to alternative cleaner fuels.	Support should be forthcoming for Biomethane production which can deliver sufficient Biogas into the grid. A working group should be established involving key industry stakeholders with representation from the DAFM and Department of Transport to drive forward opportunities to develop more interest in anaerobic digestors.	To ensure a vibrant and competitive marketplace it is very important that the increase in carbon tax and the cost of diesel does not compromise SMEs and those operating diesel-powered businesses who have no alternatives due to prohibitive costs of the new technology, the lack of availability of the technology or where the infrastructure has not been developed to support the new fuelling technologies.

FTAI KEY RECOMMENDATONS

Road safety

To ensure all operators are adhering to the rules around working time, tachograph requirements and roadworthiness there must be effective enforcement. For effective enforcement, the authorities charged with regulating the industry must be sufficiently resourced.	Graduated Fixed Penalties should be considered as an effective and efficient means of enforcement for driver's hours offences, minor roadworthiness and other issues such as overweight and over height vehicles.	Develop more engagement with commercial fleet operators to ensure road safety messages are aligned and filtered down to all organisations, through the establishment of a road safety industry working group.	Having a body that is responsible for the sector (Traffic Commissioner) would assist in creating a more dynamic approach to effective enforcement, a greater understanding of the rules around compliance, and the development of effective outreach programmes for mutual benefit.

FTAI KEY RECOMMENDATIONS

Mobility package

Discretion is allowable for the implantation of elements of the Mobility Package. It is important that authorities in Ireland do not create an unfair environment for Irish business by not implementing elements of the Package that are rigorously enforced in other Member States.	While many Irish companies already operate on a model where the HGV returns to Ireland at least every eight weeks, the provision creates unintended consequences for specialist hauliers. An example of this are companies which move equipment on concert tours across Europe, some of which can last longer than eight weeks, and provide an end-to-end service to touring artists and their crews.	Authorities responsible for regulation and enforcement must provide regular updates to industry on the new requirements to ensure all have the ability and means to be compliant.

FTAI KEY RECOMMENDATIONS

Road infrastructure

It is important that Ireland participates on the European Access Point for Truck Parking Data programme, as we are reliant for the movement of goods by international hauliers and their drivers. Creating a connection with this information will help planning of rest periods and support the welfare of drivers.	Clear guidelines need to be developed advising industry of the plans for future road user charging for freight transport. A common approach to road charging to provide a benefit to the industry overall, against the increase in costs as a result of charging and tolling.	The current reduction in Toll rates for users of 'Alternative Fuels' should continue.

FTAI KEY RECOMMENDATIONS

Labour market skills

Building on the experience of Brexit and Covid-19 government and industry should work together to shift perceptions highlighting the strategic importance of logistics to the Irish economy and criticality of professions such as HGV driving.	Key to attracting people into the sector is making it easy for people to understand the available roles and the career progression opportunities linked with the haulage sector. The Logistics and Supply Chain Skills Group is working on mapping out available roles and developing outreach programmes supported by logistics champions that will aid the generation of awareness of the industry.	Better promotion of careers within the sector as well as new innovative practices means it will become more appealing generally as a viable profession, with less gender stereotyping.	Developing a consistent and sustainable outreach to secondary schools and further education providers is important in highlighting the diversity of roles and opportunities that exist in the freight distribution and logistics sector including the haulage sector.

FTAI KEY RECOMMENDATIONS

Intermodal transport

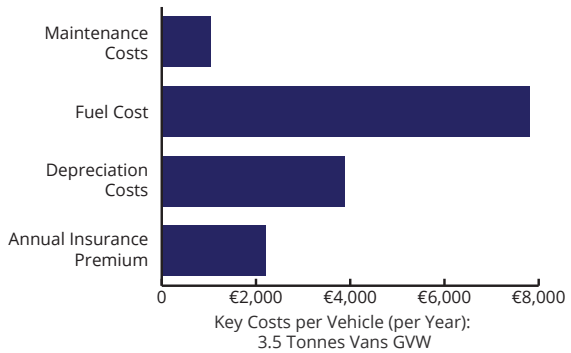
Supporting efficient logistics through the planning system – Freight movements are actively discouraged by the planning system from delivery bays to cargo bikes, to the circumference of turns at junctions.	Local Authorities need to support urban and town centres with shared services that allow easy collection and returns (reducing 'reverse logistics' volumes).	All urban transport plans should take account of the complexity of freight distribution rather than taking it for granted. In a lot of cases planning permission is granted for commercial purposes without taking account of the complexities of deliveries and the space needs for HGVs and LCVs to carry out collections/ deliveries in a timely and safe manner. For thriving urban centres more must be done to support the freight distribution and logistics sector to carry out their services in a safe manner and to co-exist with other road users.	Moving freight quickly into and out of ports to and form inland consolidation/ distribution centres will improve efficiencies for distribution, reduce traffic congestion and improve air quality.

Truck Operating Analysis

The following section analyses a number of important operating metrics for truck operators, by vehicle type, including vehicle purchase prices and depreciation, distances travelled (including 'double running' where operators achieve this), vehicle ages and life spans, fuel costs and consumption, tyre costs and life spans and maintenance costs and attributes.

Key Metrics: 3.5 Tonnes Vans GVW	2018	2019	2020
Purchase Price (per Vehicle)	€ 28,903	€ 27,018	€ 24,253
Depreciation Rate	18.4%	16.4%	16.0%
Annual Distance (km per Vehicle)	63,033	65,708	74,971
Average Age (per Vehicle) (Years)	3.9	3.2	3.7
Anticipated Vehicle Life Span (Years)	5.2	6.2	4.9
Fuel Consumption (L/100km)	9.0	11.2	8.2
Tyre Costs (New Tyres, per Tyre)	n/a	€ 110	€ 150
Anticipated Tyre Life Span (km)	37,500	30,000	32,500
Share of Maintenance Costs on Parts	21.9%	24.8%	25.8%

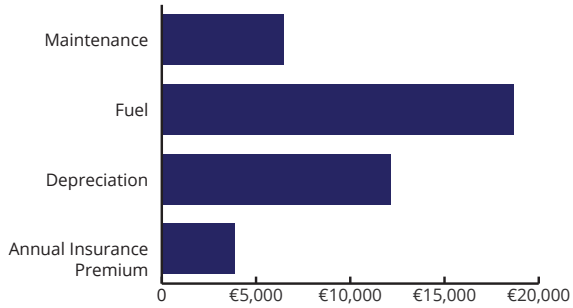
Key Costs per Vehicle (per Year): 3.5 Tonnes Vans GVW	2018	2019	2020
Annual Insurance Premium	€ 1,897	€ 2,667	€ 2,206
Depreciation Costs	€ 5,318	€ 4,431	€ 3,881
Fuel Cost	€ 7,488	€ 9,788	€ 7,807
Maintenance Costs	€ 2,679	€ 1,614	€ 1,046



Key Costs per Vehicle (per Year): 3.5 Tonnes Vans GVW

Key Metrics: Rigid Vehicles 3.5 - 18.0 Tonnes GVW	2018	2019	2020
Purchase Price (per Vehicle)	€ 76,836	€ 81,600	€ 72,664
Depreciation Rate	14.3%	16.6%	16.7%
Annual Distance (km per Vehicle)	59,169	71,071	71,376
Average Age (per Vehicle) (Years)	5.6	7.0	6.1
Anticipated Vehicle Life Span (Years)	8.1	9.3	7.4
Fuel Consumption (L/100km)	19.2	24.1	20.6
Tyre Costs (New Tyres, per Tyre)	n/a	€ 366	€ 406
Anticipated Tyre Life Span (km)	37,217	29,250	29,501
Share of Maintenance Costs on Parts	42.8%	35.0%	36.7%

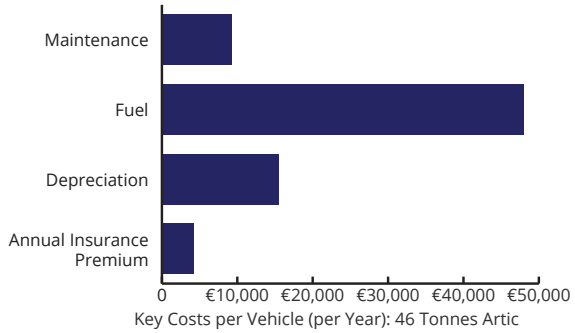
Key Costs per Vehicle (per Year): Rigid Vehicles 3.5 - 18.0 T	2018	2019	2020
Annual Insurance Premium	€ 4,456	€ 2,344	€ 3,864
Depreciation	€ 10,988	€ 13,545	€ 12,135
Fuel	€ 15,098	€ 22,609	€ 18,673
Maintenance	€ 6,273	€ 7,310	€ 6,473



Key costs per vehicle: rigid vehicles 3.5 - 18.0 Tonnes GVW

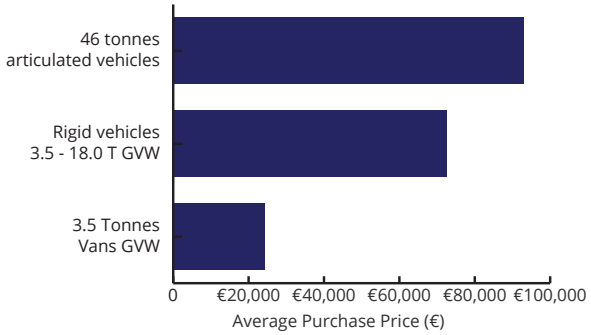
Key Metrics: 46 Tonnes Articulated Vehicles (3 Axle Tractor Unit)	2018	2019	2020
Purchase Price (per Vehicle)	€ 98,203	€ 100,667	€ 93,000
Depreciation Rate	18.3%	17.6%	16.7%
Annual Distance (km per Vehicle)	110,879	120,850	122,333
Average Age (per Vehicle) (Years)	5.2	3.8	4.1
Anticipated Vehicle Life Span (Years)	6.9	6.5	5.6
Fuel Consumption (L/100km)	31.3	29.4	30.9
Tyre Costs (New Tyres, per Tyre)	n/a	€ 402	€ 375
Anticipated Tyre Life Span (km)	113,471	91,502	113,669
Share of Maintenance Costs on Parts	48.0%	54.2%	39.0%

Key Costs per Vehicle (per Year): 46 Tonnes Artic	2018	2019	2020
Annual Insurance Premium	€ 4,363	€ 4,827	€ 4,262
Depreciation	€ 17,971	€ 17,717	€ 15,531
Fuel	€ 46,123	€ 47,255	€ 48,007
Maintenance	€ 9,173	€ 8,292	€ 9,225

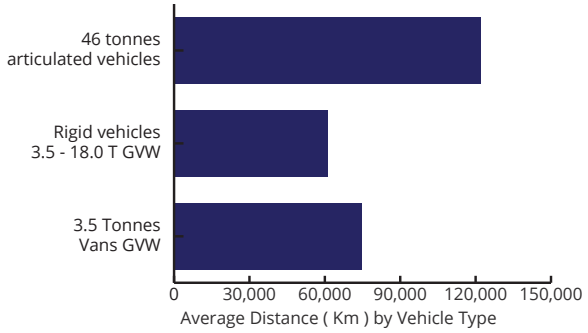


Comparative analysis by vehicle type

Average Purchase Price by Vehicle Type	2019	2019	2020
3.5 Tonnes Vans GVW	€ 28,903	€ 27,018	€ 24,253
Rigid vehicles 3.5 - 18.0 T GVW	€ 76,836	€ 81,600	€ 72,664
46 tonnes articulated vehicles	€ 98,203	€ 100,667	€ 93,000

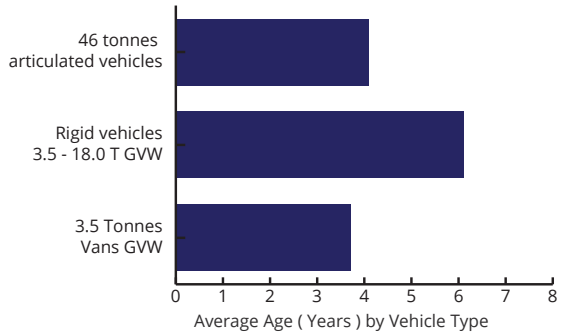


Average Distance (km) by Vehicle Type	2019	2019	2020
3.5 Tonnes Vans GVW	63,033	65,708	74,971
Rigid vehicles 3.5 - 18.0 T GVW	59,169	71,071	61,225
46 tonnes articulated vehicles	110,879	120,850	122,333

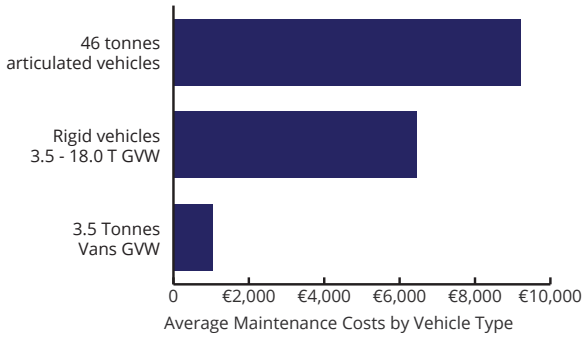


The average age of the fleets identified below should be placed in context of our assertion that a significant share of this year's research respondents are derived from larger fleet operators. In line with previous findings, in particular, we expect the average age of 3.5 tonne vans to be significantly higher.

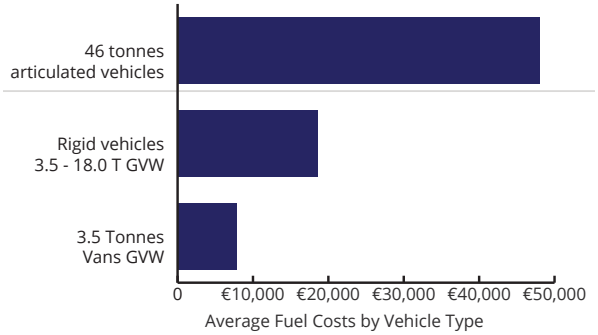
Average Age (Years) by Vehicle Type	2018	2019	2020
3.5 Tonnes Vans GVW	3.9	3.2	3.7
Rigid vehicles 3.5 - 18.0 T GVW	5.6	7.0	6.1
46 tonnes articulated vehicles	5.2	3.8	4.1



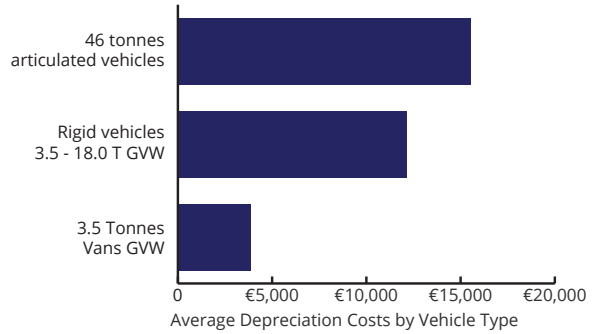
Average Maintenance Costs by Vehicle Type	2018	2019	2020
3.5 Tonnes Vans GVW	€ 2,679	€ 1,614	€ 1,046
Rigid vehicles 3.5 - 18.0 T GVW	€ 6,273	€ 7,310	€ 6,473
46 tonnes articulated vehicles	€ 9,173	€ 8,292	€ 9,225



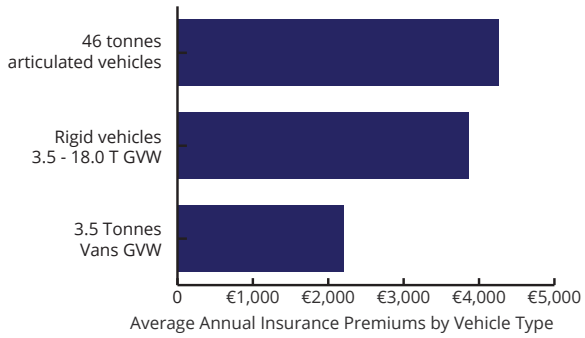
Average Fuel Costs by Vehicle Type	2018	2019	2020
3.5 Tonnes Vans GVW	€ 7,488	€ 9,788	€ 7,807
Rigid vehicles 3.5 - 18.0 T GVW	€ 15,098	€ 22,609	€ 18,673
46 tonnes articulated vehicles	€ 46,123	€ 47,255	€ 48,007



Average Depreciation Costs by Vehicle Type	2018	2019	2020
3.5 Tonnes Vans GVW	€ 5,318	€ 4,431	€ 3,881
Rigid vehicles 3.5 - 18.0 T GVW	€ 10,988	€ 13,545	€ 12,135
46 tonnes articulated vehicles	€ 17,971	€ 17,717	€ 15,531



Average Annual Insurance Premiums by Vehicle Type	2018	2019	2020
3.5 Tonnes Vans GVW	€ 1,897	€ 2,667	€ 2,206
Rigid vehicles 3.5 - 18.0 T GVW	€ 4,456	€ 2,344	€ 3,864
46 tonnes articulated vehicles	€ 4,363	€ 4,827	€ 4,262



Average Annual Insurance Premiums by Vehicle Type

Procurement, Energy and Eco-training

About Enprova

As Ireland's largest funder of energy savings projects, our remit is to help Ireland save energy and in so doing reduce emissions. We run the highly successful FTAI fleet fuel saving program (ECOfleet) which reports into the Global Logistics Emissions Council from Smart Freight Centre. Between 2014-2020 FTAI members and others working with Enprova cumulatively avoided emitting over 89,000 tCO2e.

As part of its obligations under the Energy Efficiency Obligation Scheme (EEOS), Enprova have sponsored this section of the report.

Improving fuel management leads to improved performance

Respondents this year have demonstrated the impact of energy and fuel management with a sustained reduction in L/100km year on year, helping to increase their profitability and reduce emissions per km travelled (31.3L/100km in 2018, down to 30.9L/100km in 2020).

Whilst Ireland's freight activity decreased 11.6%[1] during 2020 due to COVID restrictions, the Depts of Enterprise and Transport expect freight Tonne.km to increase by 91% to 2050 - a near doubling of activity.

As a result, efficient operation and new alternatively fuelled vehicle procurement has never been more important to managing the costs of distribution. 99%[2] of Ireland's freight goes by road, making road freight the key enabler for jobs and economic growth with over 50,000 direct employees[3].

With the average age of vehicles on our roads increasing year on year, the Dept & TII AFHDV grant is a welcome help to purchase more efficient and cleaner vehicles, justifying fuel suppliers' investment in new fuelling and EV charging technology (see **https://www.fuelsforireland.ie/news/ev-charging-point-report**).

It is encouraging to see increased interest in alternatively fuelled vehicles, particularly battery electric (now 55.6% up from 29% a year ago). The low uptake to date reflects the newly elongated supply chain (due to manufacturer chip shortages) and slow roll-out of CNG infrastructure to date.

33% of respondents are considering natural gas (CNG or LNG) and Fuels for Ireland member companies work with GNI to put in place more fast-fill CNG stations around the country, with two more opened to date in 2021. FTAI members report more CNG trucks now on the road in Ireland and sustained attendance at the FTAI alternative fuels working group https://www.ftai.ie/alternative-fuels-working-group attests to ongoing interest.

Understandably the industry is focussed on managing its existing vehicles using fuel cards and telematics, and it's reassuring to see over 83% of respondents now using telematics to manage fuel. It is even better to see fuel performance reported to senior management on a weekly / monthly basis at over 83% of respondents; this shows how the industry is moving to contain costs and start on the sharing of data with customers (now at 58% of respondents up from 38%).

With the rapid increases in energy prices experienced over recent months, it has never been more important to save on fuel costs. Managing fuel and emissions through educating managers and drivers (with the aim of reducing fuel consumption and CO2 emissions) is now proven to save thousands every year (ECOfleet participants avoided using over €56m in fuel 2014 to 2020). Furthermore, programmes such as the FTA logistics apprenticeship scheme and codrived training for drivers (Enprova funded) are another step towards this (62% of drivers now trained according to respondents).

The future, carbon budgets

Enprova was set up by Fuels for Ireland[4] in 2014 to achieve the energy efficiency targets set by Government under the EEOS, **a major contributor to Ireland's non-ETS emissions reductions to date.** Our support for fleets continues to 2030. We aid and incentivise fleets to make energy and fuel efficiency gains, to contribute to their company's bottom line profit and carbon budgeting[5]. Our funding and FTAI members' actions contribute to Ireland's Carbon Budget targets by rewarding improvements in energy performance over time.

Enprova is delighted to see this very useful survey published and look forward to seeing it progress in the coming years.

(1) CSO 29th June 2021 https://www.csoie/en/releasesandpublications/er/rfts/roadfreighttransportsurveyquarter4andyear2020/

(2) 10 Year Haulage strategy https://www.gov.ie/en/publication/3d568-ten-year-strategy-for-the-haulage-sector/#

(3) Source DTTAS/IGEES Transport Trends 2019

(4) See https://www.fuelsforireland.ie/ formerly the Irish Petroleum Industry Association (IPIA)

(5) In Ireland, the carbon budget is be set by law. The Climate Action and Low Carbon Development (Amendment) Bill sets out how carbon budgets will be set in Ireland, a specific transport budget is expected to be announced at COP26 in Glasgow.

Enprova
W: http://enprova.ie/
T: 01 801 0140

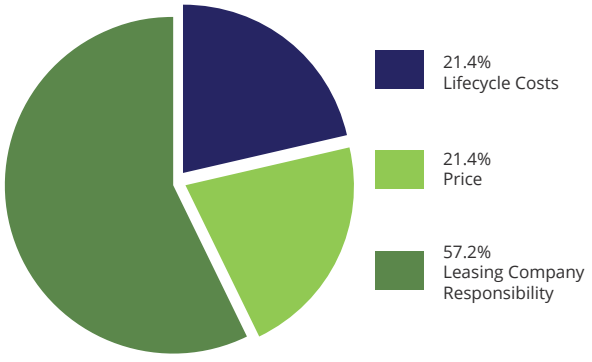
Managing Your Fleet

In this section of the Manager's Guide to Distribution costs we explore how commercial vehicles are procured in Ireland, the use of, and demand for alternative fuelled vehicles, the reporting and monitoring of fuel consumption, approaches to transport management and the actions operators are taking to save fuel.

Vehicle Procurement

57.2% of commercial vehicle operators in Ireland pass responsibility for the acquisition of vehicles to a leasing company, whilst around one-fifth (21.4%) issue RFQs, or tenders, based on price, with a similar – and increasing – share of operators issuing RFQs, or tenders, based on the anticipated life cycle costs of their vehicles.

Vehicle Procurement Decision-Making	2018	2019	2020
Lifecycle Costs	9.1%	11.7%	21.4%
Price	27.3%	47.1%	21.4%
Leasing Company Responsibility	63.6%	41.2%	57.2%
Total	**100.0%**	**100.0%**	**100.0%**

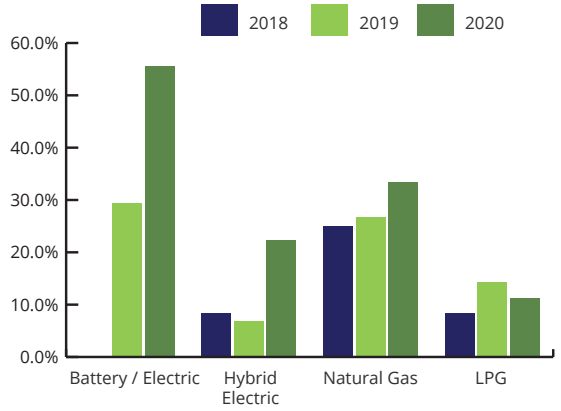


Alternative Fuels

Despite uncertainty and a lack of clarity over future fuel choices, fleet operators' interest in alternative-fuelled vehicles is increasing. It is very encouraging to see that over one-half (55.6%) of our research respondents tell us that they are actively investigating the use of battery / electric vehicles, whilst one-third (33.3%) are exploring the use of natural gas vehicles.

Further data on the use of alternative fuelled vehicles in Ireland is provided in the market data appendix.

Share of Companies Actively Exploring Fuel Types	2018	2019	2020
Battery / Electric	0.0%	29.4%	55.6%
Hybrid Electric	8.3%	6.7%	22.2%
Natural Gas	25.0%	26.7%	33.3%
LPG	8.3%	14.3%	11.1%



Reporting and Monitoring Fuel Consumption

For the first time in our report series, we asked our fleet operator respondents to identify the cost savings that they are making from the use of alternative-fuelled vehicles. For those of our respondents using alternative energies, across all fuel types, the average cost saving was 5.1%, but it was noticeable that among those that have embraced alternative fuels over a longer period, savings are more likely to be in the high, single digit percentage range.

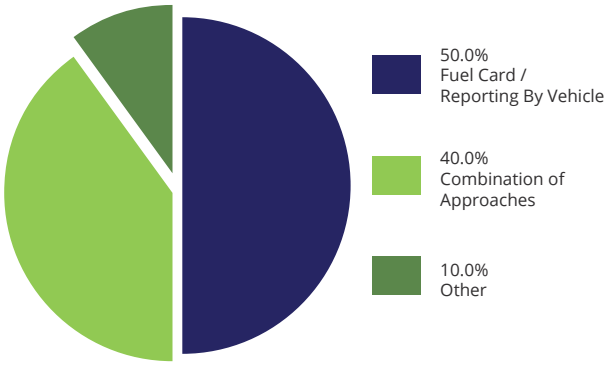
Cost savings from the use of alternative fuels in your commercial vehicle fleet	2020
	5.1%

One-half of our research respondents (50.0%) indicate that fuel cards are used monitor fuel consumption for commercial vehicle fleets. 40.0% of companies use a combination of approaches to report fuel use, whilst 10.0% use other, bespoke systems, largely defined as 'manual' reporting, based upon driver feedback and logging / data recording.

The challenges that research respondents see in collecting, reporting and analysing fuel data are numerous, but are broadly equally represented by the following respondent quotes:

- "Managing multiple sources of data and finding the time. We have to download and filter results and then manually input."
- "Reconciliation of fuel usage. Collecting correct and accurate data is a challenge."
- "Integration. It is difficult working across different manufacturer's telematics systems."
- "Due to the urgency and volume of hires, particularly during peak periods, we have been struggling to keep pace with recording all distance travelled."
- "Time taken to report is prohibitive – especially across various fuel sources."
- "It is difficult to track distances of hired vehicles."

Reporting and Monitoring Fuel Consumption	2018	2019	2020
Fuel Card / Reporting By Vehicle	72.7%	53.3%	50.0%
Combination of Approaches	9.1%	40.0%	40.0%
Other	18.2%	6.7%	10.0%
Total	**100.0%**	**100.0%**	**100.0%**



Notes (1) Combination frequently refers to use of fuel cards and telematics systems. (2) Other is defined as: 'manual' reporting, or in-house systems, based upon driver feedback and logging / recording.

How is This Fuel Data Used?

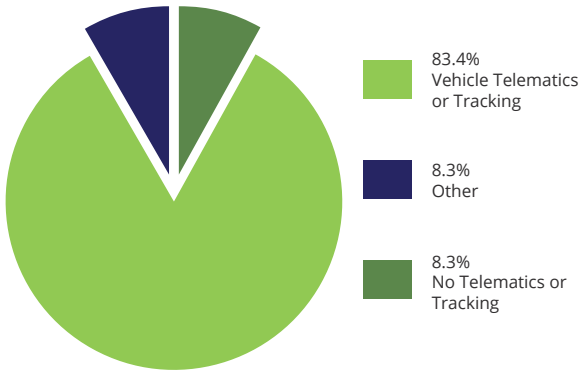
For a second year, we sought to understand not only how companies collect and monitor fuel consumption, but also – across six key areas – to what extent they then make use the data they have. Over four-fifths (83.3%) of companies report the data to senior management on a regular (weekly/monthly) basis and an increasing share, three-quarters (75.0%), use the data to assist in the training of staff and drivers. Almost 60.0% of companies use the data in communications with customers – a big leap from last year - and two-thirds use the fuel data to promote their company's sustainability efforts.

Share of respondents stating that fuel data is used to:	2019	2020
Report to senior management on a regular (weekly/monthly basis)	82.4%	83.3%
Assist in the training of staff and drivers	70.6%	75.0%
Support the procurement of new vehicles	88.2%	91.7%
Allocate specific work to vehicles	52.9%	58.3%
Enhance communications with customers	37.5%	58.3%
Promote the company's sustainability efforts	76.5%	66.7%

Transport Management and Planning

How do fleet operators plan and control vehicle use in commercial vehicle fleets in Ireland? 83.4% use vehicle telematics or tracking, whilst just 8.3% of operators do not use any system of telematics or tracking.

Methods to Plan and Control Vehicle Use	2018	2019	2020
No Telematics or Tracking	15.4%	5.6%	8.3%
Vehicle Telematics or Tracking	61.5%	77.8%	83.4%
Other	23.1%	16.6%	8.3%
Total	**100.0%**	**100.0%**	**100.0%**



A number of challenges in transport management and planning were identified by our research respondents:

- Managing internal reporting methods
- Handling labour union / regulations issues
- Optimising software for continuous improvement
- Network challenges, questioning both the cost and the quality of external systems

Company Transport Management and Planning Costs

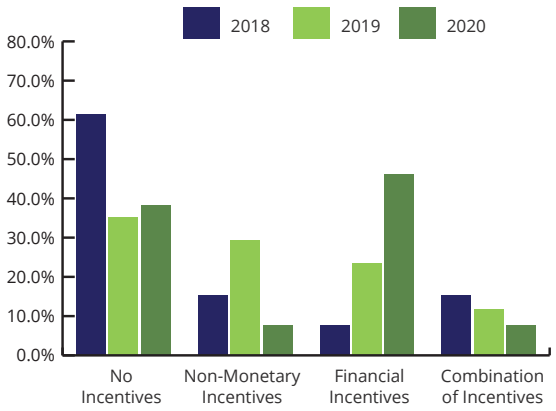
Amongst our respondents, average annual costs related to transport management were once again in excess of €30,000. Transport management and planning costs are defined as the total financial cost for tools used by operators to plan, control and monitor their commercial vehicle fleet. This include costs of initial system purchase and / or ongoing fees. If an in-house developed system is used, we identified the financial costs allocated to the system's upkeep, maintenance and development.

Transport Management and Planning Costs	2018	2019	2020
Average annual cost of transport management and planning	€ 32,520	€ 34,274	€ 33,515
Average annual cost of transport management and planning per vehicle	€ 845	€ 923	€ 1,035

Action and Incentives to Save Fuel

Amongst our respondents, on average, 62.1% of drivers have received ecodrive training. Around one-third of commercial vehicle fleet operators (38.4%) do not offer their staff incentives to save fuel. Amongst those operators that do offer fuel saving incentives, there is a healthy mix of approaches, across both non-monetary and purely financial-based incentives. Amongst those operators offering financial incentives, on average €321 is spent per year, per driver, to encourage more efficient use of fuel, a significant increase on figures reported in 2019.

Action and Incentives to Save Fuel	2018	2019	2020
No Incentives	61.5%	35.3%	38.4%
Non-Monetary Incentives	15.4%	29.4%	7.7%
Financial Incentives	7.7%	23.5%	46.2%
Combination of Incentives	15.4%	11.8%	7.7%
Total	**100.0%**	**100.0%**	**100.0%**



Average share of drivers that have been ecodrive trained or with similar training, to save fuel	2020
	62.1%

Incentives Levels to Save Fuel	2018	2019	2020
Average incentive costs per company to save fuel per year	€ 12,273	€ 13,182	€ 18,874
Average incentive costs per driver to save fuel per year	€ 207	€ 190	€ 321

ARE YOU STRUGGLING FOR TIME TO HIT YOUR FUEL SAVING TARGETS?

MAKE SURE YOU GET YOUR ENERGY CREDITS FOR HELP TOWARDS:

- FUEL PERFORMANCE
- FLEET MANAGEMENT
- ALTERNATIVE FUELS AND VEHICLES
- ECODRIVE TRAINING
- ENERGY AUDITS
- ISO 50001
- EMISSIONS ACCREDITATION
- CARBON REPORTING

enprova.ie

REGISTER NOW

VISIT: ENPROVA.IE/TMS
CALL: 01 8010140

ENPROVA
IRELAND'S ENERGY CIRCLE

TruckSafe 'Green' Standard

Since our foundation in 2010, FTA Ireland (FTAI) members have sought to develop and implement industry wide standards that facilitate a path to continuous operational compliance and sustainable operations through efficient fuel management and professional development. Over the past 10 years, FTAI have been working with commercial fleet operators to improve their environmental management through the annual 'TruckSafe' and 'VanSafe' audits that assess levels of compliance with driver safety, road safety, haulage operations, roadworthiness, working time and environmental efficiencies.

This process has helped our members to save over 2.5 million litres of diesel fuel and demonstrates members' commitment to compliance and safety standards affording them recognition for the highest standards of professionalism and commitment to road safety. In February 2021, FTAI launched the 'TruckSafe Green Standard' to reinforce our members' commitment to reducing greenhouse emissions and improving air quality. Achieving the Green Standard recognition is based on active participation in fuel management programmes, which must be evidenced by quarterly uploads of fuel performance data, as well as an annual action plan signed by a business' CEO, as well as operation 100.0% Euro VI trucks and or investing in alternatively fuelled technologies. And, while the FTAI TruckSafe Standard has always included environmental measures, the introduction of the Green Certificate as part of the process is timely, as it also recognises compliant and professional commercial fleet operators looking to transition to alternative fuels such as compressed natural gas (CNG), liquified natural gas (LNG), Hydrogen and electric.

In attaining sustainability, businesses must have the basics right; the ability to price services right, manage overheads and operational compliance and to meet their legal obligations. In addition, for commercial fleet operators, it is very important that they are road safe and meeting health and safety obligations. All of these add up to key ingredients for sustainable and profitable operations.

Getting recognition for this good work has many benefits both for the operator and the industry, as it helps raise awareness of standards and good practices and develops more focused procurement practices and improved road safety.

Of course, with this focus it de facto supports operator's preparation for the future in a more strategic and structured manner. The cost of fuel must be understood and how its cost impacts margins. Creating a focus on fuel management (litres used and KM driven) per vehicle is an important basis for aiding decisions on the vehicle procurement options available to operators that will deliver the best savings for the business and ultimately have the greatest impact in reducing their carbon emissions and improving air quality.

FTAI have partnered with Enprova who provide incentives in the manner of funding to companies who can demonstrate fuel efficiencies. Each quarter FTAI collate the kilometres driven, litres of fuel used per vehicle and submit to Enprova who log the energy credits. This is turn is audited by SEAI.

Enprova is a unique collaboration by the IPIA (Irish Petroleum Industry Association) and its members who represent 95.0% of the Irish Oil Industry, to assist Ireland in meeting these energy saving obligations through tailored energy savings solutions. IPIA members are delivering energy saving measures through their Enprova Better Energy Programme agreed with the Department of Communication, Energy and Natural Resources.

FTAI is taking the lead in promoting sustainability and fuel-efficient management systems within our membership. For more information on the Green TruckSafe Standard please email **info@ftai.ie** and visit **https://www.ftai.ie/trucksafe**

ECOdrive Training

FTA Ireland — Celebrating 10 years

Our ECOdrive Training involves in-cab driver tuition aiming to help businesses reduce fuel and maintenance costs, reduce CO_2 emissions and improve safety through enhanced driving techniques, and increased driver awareness, vehicle control and fuel economy.

Course objectives/aims

Our ECOdrive Training Programme will deliver:

- Improved driver performance in L/100km.
- Average fuel savings of 8%.
- Real and immediate bottom line savings €€€s.

By simply reducing fuel consumption by 1,000 litres per year will save €1,100 and 2.6 tonnes of carbon dioxide emissions (assuming a price of €1.10 per litre, ex VAT).

- Fuel Efficient Drivers = Safer Drivers = Good Risk Management.
- Counteract the cost of rising fuel prices.
- Reduce running costs and emissions.
- Improve profit margins.

Who should attend?

Drivers of any vehicle wishing to improve driving techniques and reduce vehicle running costs.

Book today
Tel: 01 8447516 or
Email: info@ftai.ie

01 8447516 info@ftai.ie www.fta.ie

Employment, Wages and Training

Skill Shortages.

Mutual respect within the supply chain will help alleviate the skills shortage

The freight distribution and logistics industry is a vibrant and vital sector for the economy of Ireland, contributing in excess of €1.0 billion a year to the exchequer in the form of PAYE, PRSI and road taxes. The transport sector in particular has been less successful than others in recruiting younger workers. There are many reasons for this, including a perception that it is made up of predominantly low skilled jobs, working hours are long, unsociable, and unpredictable, and there isn't an obvious career path. This perception must change. Unfortunately, because of this perception, the transport and logistics sector is suffering from a serious skills shortage across all levels, which hinders business expansion and makes dealing with change within the transport and logistics sector extremely difficult. We need to question why there is a skills shortage in the first place.

The labour needs of the freight, transport, distribution and logistics sector are developing as forecast in the 2015 EGFSN report(1). At the time of 2016 Census there were 49,470 people working in this field. In the absence of a major external shock, the labour needs of the sector are expected to increase to 66,204 by 2025(2).

Given the age profile of people working in the sector, approximately 13,752 of those currently working in the sector are expected to retire by 2025. A total of 30,486 individuals will have to decide to take up careers in the sector and receive all the necessary training between now and 2025 in this baseline scenario.

The table below is extracted from page 103 of the report

(1) The FTDL-14 encompasses four categories of road freight drivers: HGV vehicle drivers, fork-lift truck drivers, mobile machine drivers & operatives, and other drivers & transport operatives. These four categories comprise approximately 60.0% of the total baseline supply.

(2) The shortfall as a percentage of 2011 employment conveys the quantity of labour needed relative to the baseline quantity. The occupation-level shortfall rates range from 28.0% to 37.0% in the Delayed Adjustment Scenario and from 34.0% to 47.0% in the Recovery Scenario.

(3) The demand for HGV drivers also ranks highly in terms of relative shortfall: 5th highest, at 43.0%, in the Recovery scenario and only one point lower than the highest, at 36.0%, in the Delayed Adjustment Scenario. This reinforces the need for additional drivers in almost any economic scenario. Indeed, even with no change in output, there would be a shortfall of some three thousand HGV drivers resulting from retirements.

	2011	2020 Demand		Shortfall 2020	
	Baseline	Recovery Scenario	Delayed Scenario	Recovery Scenario	Delayed Scenario
HGV drivers	19,758	25,201	23,920	8,406	7,125
Mobile machine drivers & operatives n.e.c.	5,426	6,921	6,569	2,230	1,879
Managers & directors in storage & warehousing	4,071	5,193	4,929	1,430	1,166
Managers & directors in transport & distribution	3,497	4,460	4,234	1,381	1,154
Fork-lift truck drivers	3,074	3,921	3,722	1,135	935
Transport & distribution clerks & assistants	2,767	3,529	3,350	951	772
Aircraft pilots & flight engineers	1,622	2,276	2,117	765	606
Other drivers & transport operatives n.e.c.	1,278	1,630	1,547	583	500
Air transport operatives	1,135	1,593	1,482	529	417
Rail transport operatives	999	1,274	1,209	393	329
Train & tram drivers	670	855	811	229	185
Ship & hovercraft officers	623	747	719	230	202
Marine & waterways transport operatives	543	651	626	190	165
Importers & exporters	332	423	402	148	126
FTDL-14	**45,795**	**58,676**	**55,636**	**18,601**	**15,562**

In 2019, Dr Chao Ji-Hyland and Declan Allen from School of Management, College of Business, Technological University Dublin (TU Dublin), published their research study titled 'What do professional drivers think about their profession? An examination of factors contributing to the driver shortage'. They found that key issues for drivers were pay and conditions, long working hours but more tellingly was the unfavourable views held by the public towards drivers and the consensus that drivers need to be treated with more respect and dignity.

In Ireland, road transport is the dominant mode of distribution of goods with over 141.0 million tonnes moved by road in 2020 [CSO]. According to the Department of Transport there are approximately 40,000 heavy goods vehicles over 3.5 tonne gross vehicle weight. In the EU, road transport accounts for approximately 75.0% of the total inland freight transport (based on tonne-kilometres performed). However, in Ireland it is much higher at almost 99.0% due to the significantly lower contribution of other modes of transport. Our reliance on truck drivers is not reflected in the status this profession has within the supply chain or in the public domain and must be challenged.

The issues with global supply chain efficiencies have been well documented, particularly the acute situation faced by our closest trading partner, Great Britain (GB). The resilience of the Irish freight distribution and logistics sector is continuously being tested as a consequence of the intense change demanded by post Brexit trading requirements and of course dealing with the consequences of Covid 19 Pandemic, where large parts of the world's economies and key markets have seen rolling disruption to manufacturing and distribution of goods and materials destined for our market. All of this adds up to additional costs of doing business, which fuels inflation. The driver shortage is not a new phenomenon, as it has been well documented at a varying level of severity over the past 20 years. What is clear is that the function of distribution is critical to efficient logistics and is often taken for granted. The cost associated with transportation is close to 55.0% of the total cost of logistics[3]. A driver shortage hinders supply chain performance and increases costs that ultimately impact the consumer.

In September 2021, FTA Ireland surveyed our members to ascertain the impact of the driver shortage on their business. The results compliment and expand upon results reported in this year's report, in that employers have had to take exceptional action to retain drivers within their workforce. While 75.0% of respondents have been affected by shortage in the past six months, just under 40.0% say 'Business has grown and we don't have enough drivers to meet demand'. Part of the solution to attracting new entrants into the freight distribution is to change the perception, as already outlined, and to work as a collective to highlight the opportunities and reaffirm that salaries and terms and conditions of employment are commensurate to the roles and that they are competitive. Generally, payroll expenses that fall between 15.0% to 30.0% of gross revenue is the safe zone for most types of businesses. Whilst we have seen growth in average salary increase in this year's report by an average 13.2%, followed in the first half of 2021 by a further 13.4% increase as per the FTAI survey, employers must ensure that this is sustainable and supported by changes in their income models to compensate for the significant increases.

FTAI Driver Shortage Survey H1, 2021	
Have you increased your drivers salaries and terms and conditions in the past six months?	
Yes	84.2%
No	15.8%
Total	**100.0%**

FTAI Driver Shortage Survey H1, 2021	
If Yes, please indicate the percentage increase:	
Average driver salary increase (all vehicles)	13.4%

The lack of diversity within the profession of driving is telling. The importance of training and education to shaping the image of driving as a profession cannot be understated. The Freight Transport Association Ireland (FTAI) as the lead proposer and Sligo IT, the coordinating education and training provider, will launch a new 2-year level 6 Commercial Driver Apprenticeship in January 2022. This is the first qualification on the national framework of qualifications linked with the profession of commercial driving. Apprentices will work, earn as you learn, whilst attending college one day per week whilst preparing to do their Heavy Goods Vehicle (HGV) C & CE driving test. This will deliver fully qualified drivers into the industry whilst supporting a progressive outreach to young people promoting the profession of driving to young men and women. The Commercial Driver apprenticeship is industry-led, supported by the Higher Education Authority and Apprenticeship Ireland and demonstrates that industry, when working collaboratively and supported by the state, can deliver solutions for the skills shortage. All initiatives such as driver traineeships and the apprenticeships need the support of key stakeholders and employers within the industry to blossom.

Further supports for sharing the burden of the skills shortage within the supply chain through the revision of contracts, reassessment of delivery expectations and more consolidation of distribution services to maximise the load capacity of trucks that supports the haulage sector sustainability should be considered. Pay and conditions, adherence to the working time and tachograph regulations, focus on the roadworthiness of vehicles and training of staff all contribute to and shape the image and perception of drivers and their employers as a profession. To support fair competition, investment by the State in the regulatory authorities such as the Road Safety Authority and An Garda Siochana Road Policing Division must be prioritised. Respect for Driving as a Profession needs to be prioritised within the supply chain and supported by the general public. The next time you come into contact with a truck driver, wave instead of shaking the fist, be considerate instead of impatient and consider that they are only doing their job the best they can!

(1) http://www.skillsireland.ie/Publications/2015/18022015-Freight-Skills-Publication-pdf.pdf

(2) https://dbei.gov.ie/en/Publications/Publication-files/Skills-needs-potential-trade-implications-Brexit.pdf

(3) Wilson, R. 2013. 24th Annual State of Logistic Report. Washington, DC: Penske Logistics, Inc

Apprenticeships – supporting the future of the freight distribution and logistics sector.

The challenges with global supply chain efficiencies have been well documented. Brexit has demanded the necessity to change quickly, and this has been exacerbated by the Covid 19 Pandemic. It gives more credence to the quote from the world-renowned management consultant Peter Drucker who said **'the greatest danger in times of turbulence is not the turbulence - it is to act with yesterday's logic.'**

There are great opportunities for Ireland, as an English-speaking country, to become of strategic importance for international supply chain connectivity. Remaining resilient and becoming better at attracting younger people into the industry is critical to our future success. The Addressing the Demand for Skills in the Freight Transport, Distribution and Logistics Sector in Ireland 2015-2020 report, published in 2015 was the first report examined and found that, due to an anticipated expansion in the sector and the replacement demand for those employed in core Freight Transport, Distribution & Logistics occupations that some 13,500 to 15,500 job vacancies could become available over the period 2015-2020.

Some of the findings in the EGFS report include the following:

- Recognition that a large number of new drivers will be needed due to the age profile of the current drivers in Ireland and looking at the demand scenario analysis for 2020.
- Job vacancies in the FTDL sector expected to rise for two main reasons: the performance of the FTDL sector is expected to grow (accounting to 60.0% of job vacancies) and the numbers resulting from replacement demand needs (40.0% of job vacancies).
- 18.0% of respondents reported difficulty in recruiting HGV drivers with the required licence.
- In addition to the quantitative needs identified in the report, it is also noted that there is a qualitative need, i.e., the sector has a poor career image, does not attract women and does not offer access to broader career opportunities in the logistics sector of the economy.

This report has now been supplemented by the Addressing the Skills Needs Arising from the Potential Trade Implications of Brexit, 2018[1], which recommended the Establishment of a National Logistics and Supply Chain Skills Group, to manage a coordinated response from the Logistics and Supply Chain sectors to promote the sectors and their skills needs and to develop a schools/communication toolkit and awareness raising campaigns for Logistics, Supply Chain and Transportation careers across all sectors, and an improved understanding of the cross sectoral skills needs, employment numbers and career opportunities in supply chain activities. A final recommendation, important in the context of new apprenticeship and training programmes for the industry, was the recommendation to support the development and promote the rollout of and engagement with the Logistics and Service apprenticeship programmes.

The Logistics and Supply Chain Skills Group has delivered its first update report in December 2020 titled: Logistics and Supply Chain Skills Group Annual Progress Report[2]. Just in time delivery principles, combined with the pressure for increased environmental performance makes the efficiency levels of logistics management increasingly important. This report highlights that the logistics industry is very important for the Irish economy and that transportation and storage accounts for around €6.5 billion of total gross value added in the Irish economy. There are over 103,000 Employed in the Transportation and Storage Sector in Q3, 2020 compared to 104,000 in Q3, 2019. This demonstrates that the logistics industry is dynamic and is resilient in the face of the significant challenges faced by the Covid 19 Pandemic.

The latest Department of Transport Bulletin of Vehicle and driver statistics details that there are 366,760 goods vehicles[3]. According to this report, there are 39.920 vehicles over 3.5 tonnes covering the own account and hire and reward industry.

All of the work and analysis that has taken place to date is complimented by the Government policy to support apprenticeships which are now listed on the CAO. The Apprenticeship Incentivisation Scheme for employers of apprentices has been extended to 31 December 2021. The €3,000 payment to employers who take on an apprentice has been extended to the end of 2021.

There is now a growing list of available apprenticeships, traineeships, higher education courses (including springboard courses) in the freight distribution and logistics sector. The logistics Associate Apprenticeship [**www.laa.ie**] was the first dedicated apprenticeship for the logistics sector launched in 2018. There are now over 60 employers with apprentices on the programme in Technology University Dublin (TuDublin) and Munster Technology University (MTU). This apprenticeship has proven that by offering structured training and qualifications on the national framework of qualifications that you can attract new entrants into the industry and provide additional benefits for employers as the workforce become better skilled and supports career progression that works to develop employee loyalty.

A new Commercial Driver Apprenticeship, [**www.cdap.ie**] a 2-year level 6 higher certificate in transport operations and commercial driving will be launched through IT Sligo in January 2022. The Commercial Driver apprentice will complement the successful attainment of the full HGV licence (C + EC) with academic training in core modules that facilitate a holistic understanding of the requirements to operate a commercial vehicle safely, as well as specialist knowledge in key disciplines that benefit the career development of the driver when matched with practical experience.

Apprenticeship programmes are not a silver bullet in dealing with the skills shortage, however they offer a solution to combat the shortage. There are many benefits for employers as apprenticeships can afford them the best possible chance to reinvigorate their workplace with dynamic and enthusiastic young people, protecting their future sustainability and supporting career progression for their employees. For apprentices there are also many opportunities, to earn as you learn, match the academic qualification with the essential work experience that will support exciting career opportunities and sow the seed for lifelong learning. For more information on apprenticeship visit **https://apprenticeship.ie/** or email **info@cdap.ie / agorecka@laa.ie**

(1) https://enterprise.gov.ie/en/Publications/Publication-files/Skills-needs-potential-trade-implications-Brexit.pdf

(2) http://www.skillsireland.ie/all-publications/2020/logistics-and-supply-chain-skills-group-annual-progress-report-.pdf

(3) https://www.gov.ie/en/publication/0f943b-irish-bulletin-of-vehicle-and-driver-statistics-2019/

GENERATION APPRENTICESHIP
www.apprenticeship.ie

LOGISTICS ASSOCIATE APPRENTICESHIP

The Logistics Associate Apprenticeship is a Level 6 Higher Certificate in Logistics and is the first of the industry - led programmes to be delivered by Technological University Dublin and Cork Institute of Technology.

BENEFIT OF RECRUITING APPRENTICES FOR EMPLOYERS

- Suitably skilled recruits
- Upskilling existing workforce
- Attracting new people to the freight distribution and logistics sector
- Develop internal agencies
- Build loyalty and reduce staff turnover
- Help with succession planning
- The programme is built around work-related experience and work specific projects

BENEFITS FOR APPRENTICES

- Level 6 Award 'Higher Certificate in Logistics'
- Internationally Recognised Qualification
- 'Earn as you Learn'
- Personal Development
- Excellent Career Opportunities
- Getting Third Level Education
- Gaining valuable 'on the job experience'

MINIMUM ENTRY REQUIREMENTS ARE A GRADE H7/O6 OR ABOVE IN FIVE LEAVING CERTIFICATE (OR EQUIVALENT) SUBJECTS.

ELIGIBILITY VIA RECOGNITION OF PRIOR LEARNING (RPL)

THE COORDINATING TRAINING AND EDUCATION PROVIDERS FOR THIS APPRENTICESHIP PROGRAMME ARE TU DUBLIN AND CIT.

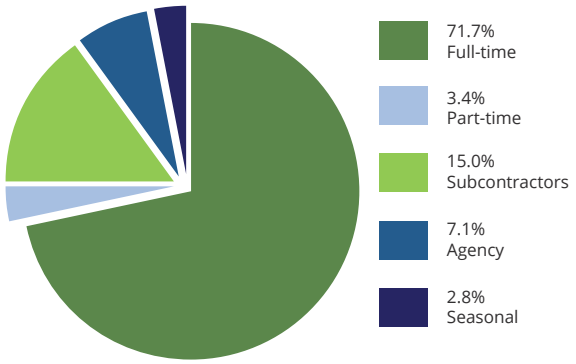
THE LEAD PROPOSER IS FREIGHT TRANSPORT ASSOCIATION IRELAND (FTAI).

@LogisticsAssoc1 01 844 7516 info@laa.ie www.laa.ie

Drivers' Employment Status, Conditions and Nationality

Across commercial vehicle fleet operators in Ireland, more than seven-out-of-ten drivers (71.7%) are employed on a full-time basis. 15.0% are sub-contractors and 7.1% are classifies as 'agency' staff

Drivers' Employment Status	2018	2019	2020
Full-time	62.6%	76.4%	71.7%
Part-time	4.2%	2.2%	3.4%
Subcontractors	27.0%	9.1%	15.0%
Agency	3.6%	4.1%	7.1%
Seasonal	2.6%	8.0%	2.8%
Total	**100.0%**	**100.0%**	**100.0%**



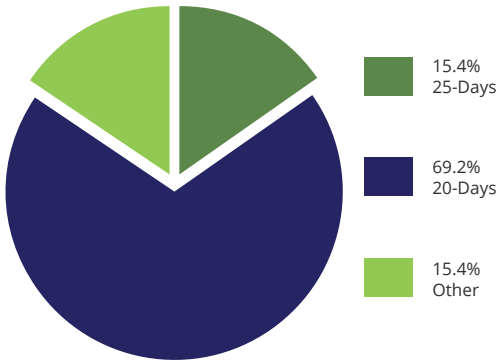
The salary figure identified below is calculated as an average across all vehicle types. Note that the average salary does not include any amounts allocated for subsistence or overtime. Across our respondents, average drivers' basic salaries increased by 5.6% in 2018, by 4.2% in 2019 and by 3.5% in 2020. A more detailed analysis, illustrating higher growth rates for specific vehicle types, is provided on the following pages.

Drivers' Salaries	2018	2019	2020
Average drivers' basic salary	€ 34,394	€ 35,839	€ 37,090
Average annual change in drivers' basic salary	5.6%	4.2%	3.5%

On average, across all vehicle types, commercial vehicle drivers are entitled to 21 days' holiday per year. Over two-thirds (69.2%) of commercial vehicle fleet operators offer drivers 20 days' holiday per year. 58.3% of commercial vehicle fleet operators in Ireland increase the amount of holiday entitlement awarded to employees based upon length of service.

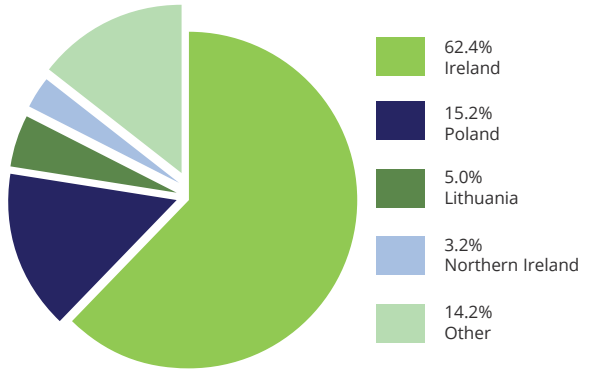
Drivers' Holiday Entitlement	2018	2019	2020
Average drivers' holiday entitlements: days per year	21.2	22.0	21.0
Share of companies with holiday policy changing by length of service	38.5%	56.3%	58.3%

Drivers' Holiday Lengths	2018	2019	2020
25-Days	15.4%	18.8%	15.4%
20-Days	53.8%	56.2%	69.2%
Other	30.8%	25.0%	15.4%
Total	**100.0%**	**100.0%**	**100.0%**



Almost two-thirds of drivers of commercial vehicles in Ireland (62.4%) are born in the country. Our research indicates around one-in-five (20.2%) hail from Poland and Lithuania, with a wide range of Eastern European countries also providing drivers to Ireland's fleet operators.

Drivers' Nationality	2018	2019	2020
Republic of Ireland	70.6%	65.6%	62.4%
Poland	14.5%	14.7%	15.2%
Lithuania	2.6%	6.4%	5.0%
Northern Ireland	6.9%	2.5%	3.2%
Other	5.4%	10.8%	14.2%
Total	**100.0%**	**100.0%**	**100.0%**



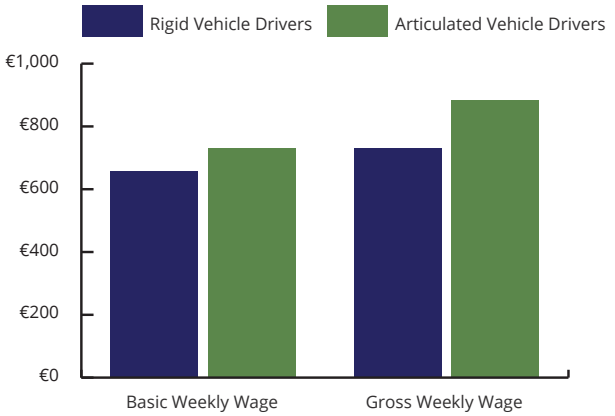
Other includes: Romania, UK (excl. N.I.), Latvia, Czech Republic, Hungary, Croatia and more...

Drivers' Employment Conditions by Vehicle Type

Average gross weekly wages for drivers of rigid commercial vehicles increased 13.2% in 2020, whilst the equivalent wage for drivers of articulated vehicles increased by 13.0%.

Rigid Vehicle Drivers	2018	2019	2020
Basic Weekly Wage	€ 577	€ 590	€ 659
Gross Weekly Wage	€ 628	€ 645	€ 730
Basic Weekly Hours	38.3	41.1	41.1
Average Weekly Hours (Inc. Overtime)	42.7	42.4	41.6
Gross Weekly Wage / Hour	€ 14.81	€ 15.11	€ 17.55

Articulated Vehicle Drivers	2018	2019	2020
Basic Weekly Wage	€ 679	€ 682	€ 731
Gross Weekly Wage	€ 788	€ 782	€ 884
Basic Weekly Hours	44.2	44.4	45.1
Average Weekly Hours (Inc. Overtime)	47.3	46.9	45.7
Gross Weekly Wage / Hour	€ 16.66	€ 16.82	€ 19.33



Notes: (1) Gross figures exclude any subsistence pay.

Our respondent's data for 2020 mirrors a separate piece of research undertaken by Freight Transport Association Ireland, showing that in the first half of 2021, truck driver salaries climbed 13.4%, as 84.2% of companies claimed to have increased drivers' salaries and terms and conditions in the past six months.

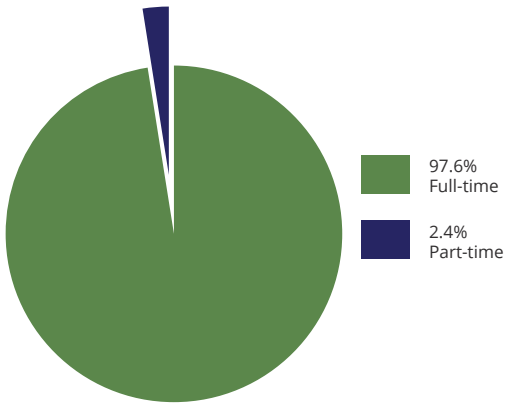
FTAI Driver Shortage Survey H1, 2021 Have you increased your drivers salaries and terms and conditions in the past six months?	
Yes	84.2%
No	15.8%
Total	**100.0%**

FTAI Driver Shortage Survey H1, 2021 If Yes, please indicate the percentage increase:	
Average driver salary increase (all vehicles)	13.4%

Transport Staff

Almost 98.0% of transport staff at commercial vehicle fleet operators, defined as transport managers and transport planners, are employed on a full-time basis.

Transport Staff Employment Status	2018	2019	2020
Full-time	97.7%	97.5%	97.6%
Part-time	2.3%	2.5%	2.4%
Total	**100.0%**	**100.0%**	**100.0%**



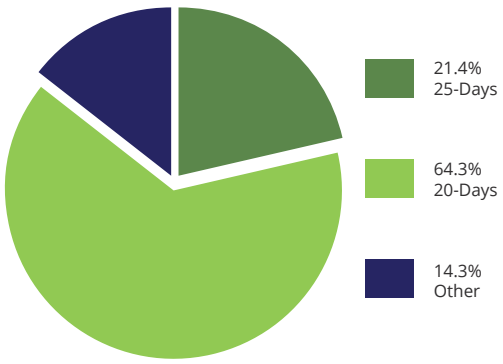
The salary figure identified below is calculated as an average across all vehicle types. Average transport staff basic salaries increased by 2.9% in 2018, by 3.8% in 2019 and by 3.2% in 2020.

Transport Staff Salaries	2018	2019	2020
Transport Staff average basic salary	€ 59,400	€ 61,657	€ 63,628
Average annual change in transport staff basic salary	2.9%	3.8%	3.2%

On average, across all vehicle types, transport staff are entitled to over 21 days' holiday per year. 64.3% of commercial vehicle fleet operators offer transport staff 20 days' holiday per year and over one-third (36.4%) of operators increase the amount of holiday entitlement awarded to employees based upon length of service.

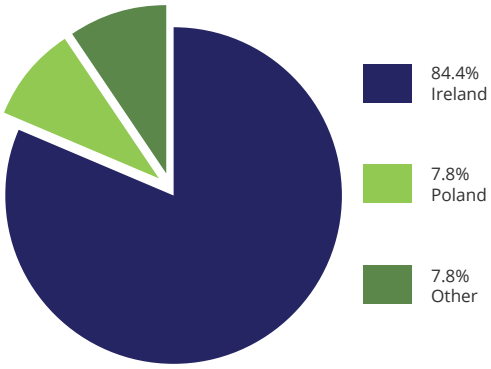
Transport Staff Holiday Entitlement	2018	2019	2020
Average transport staff holiday entitlements: days per year	21.5	21.8	21.3
Share of companies with holiday policy changing by length of service	40.0%	38.5%	36.4%

Transport Staff Holiday Lengths	2018	2019	2020
25-Days	10.0%	23.1%	21.4%
20-Days	50.0%	69.2%	64.3%
Other	40.0%	7.7%	14.3%
Total	**100.0%**	**100.0%**	**100.0%**



Over 80.0% of transport staff at commercial vehicle operators in Ireland are born in the country. Our research indicates that a further 9.3% originate from Poland.

Transport Staff Nationality	2018	2019	2020
Republic of Ireland	82.6%	84.4%	81.4%
Poland	4.3%	7.8%	9.3%
Other	13.1%	7.8%	9.3%
Total	**100.0%**	**100.0%**	**100.0%**



Transport Staff Employment Conditions by Role

Respondents were asked to provide employment details of people allocated to the roles of Transport Managers and Transport Planners. They were asked to exclude any agency employees and avoid the double-counting of staff that may perform more than one role.

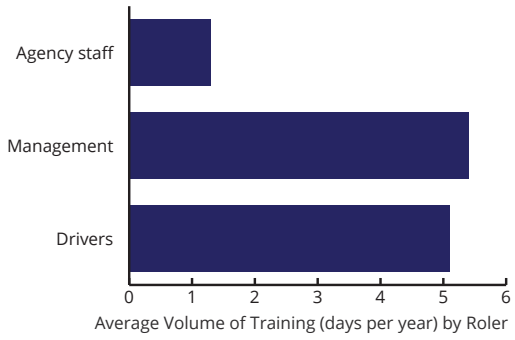
Transport Manager	2018	2019	2020
Basic Weekly Wage	€ 1,007	€ 1,007	€ 1,059
Gross Weekly Wage	€ 1,064	€ 1,113	€ 1,141
Basic Weekly Hours	40.5	42.0	43.9
Average Weekly Hours (Inc. Overtime)	44.4	47.4	46.7
Gross Weekly Wage / Hour	€ 23.96	€ 24.90	€ 24.43

Transport Planner	2018	2019	2020
Basic Weekly Wage	€ 758	€ 750	€ 734
Gross Weekly Wage	€ 699	€ 760	€ 777
Basic Weekly Hours	40.2	41.4	42.3
Average Weekly Hours (Inc. Overtime)	42.3	43.8	45.2
Gross Weekly Wage / Hour	€ 16.52	€ 17.35	€ 17.19

Training

Operators of commercial vehicle fleets in Ireland provide their drivers with over five days training per year. Management staff, defined as Transport Managers, Transport Planners, Transport Supervisors and Other Administration staff, on average, received almost five-and-a-half days training per year.

Average Volume of Training (days per year) by Role	2018	2019	2020
Drivers	5.4	5.4	5.1
Management	5.1	5.3	5.4
Agency Staff	4.7	1.7	1.3



Average Volume of Training (days per year) by Roler

Training and HR Expenditure

Across our research respondents, the average spend per company on staff training per year is €12,853 and €312 per company employee (excluding agency workers). The changes from 2019 reflect the lower number of employees per respondent company in this year's research..

Once again, our respondents spent almost €44,000 per year, on average, on Human Resource (HR) functions in 2020, allocating costs to the salaries of HR department staff (or costs of another staff member undertaking relevant activity as part of their role), external recruitment costs and training costs etc.

Training and HR Costs	2018	2019	2020
Training per year for all company employees	€ 17,371	€ 17,838	€ 12,853
Training per year per company employee	€ 223	€ 271	€ 312
HR Function (1)	€ 37,786	€ 43,922	€ 43,657

Notes: (1) Defined as the total costs to the company for all HR (human resources) activity, inclusive of costs (salaries) of HR department staff, recruitment costs, regular training costs (excl. Brexit associated costs) etc

Vacancies

Our respondents were asked to estimate costs to their company incurred in the last 12 months as a direct consequence of any skills shortages within their business. On average, it is costing companies €20,000 per year to try and overcome, or find alternative, more costly solutions, to their skills shortages, an increase of around one-third on the levels reported in 2018, but in line with last year's findings.

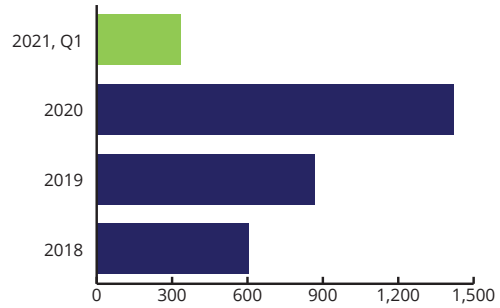
It takes commercial vehicle feel operators over 20 days to fill driver vacancies within their business.

Skills Shortages	2018	2019	2020
Costs as a consequence of skills shortage	€ 14,857	€ 20,500	€ 20,000
Time taken to recruit staff (Days to fill vacancy)	20.9	29.7	17.9
Time taken to recruit drivers (Days to fill vacancy)	22.2	24.2	20.4

Staff Turnover Rates	2018	2019	2020
Drivers	7.9%	5.2%	3.8%
All Staff	4.7%	5.2%	2.0%

In our previous research, we sought to quantify an impact of Brexit by measuring the amount of time companies were allocating to planning and preparing for new trading relationships with the UK. Resources requirements increased significantly year-on-year and our latest research identifies that post-Brexit, in Q1, 2021, allocation of resources to staff training and the implementation of new trade practices is no less significant.

Average Hours per Company Allocated to Brexit Planning / Training		Hours
Planning	2018	606
Planning	2019	867
Planning	2020	1,420
Training / Implementation	2021, Q1	335



Average Hours per Year per Company Allocated to Brexit Planning 2018 - '20 / Management Q1, '21

Costs allocated to Brexit	Q1, 2021
Average costs allocated to staff training specifically to manage the implementation of Brexit in Q1, 2021	€ 15,117

For the first time in our report series, this year we asked respondents about their use and satisfaction with domestic service areas and overnight accommodation for drivers of commercial vehicles in Ireland. Just under one-half of our respondents make use of such services, and of those, almost three-quarters (71.4%) are using them on a daily basis. Indicating a clear need for improvement in quality, satisfaction levels with domestic service areas and overnight accommodation rated only 6.2 out of ten.

Domestic Service Areas / Overnight Accommodation	2020
Both service areas and overnight accommodation services	6.7%
Domestic overnight accommodation services only	13.3%
Domestic service areas only	26.7%
We do not use domestic service or accommodation service areas	53.3%
Total	**100.0%**

Domestic Service Areas / Overnight Accommodation	2020
Fequency of Use: Share using facilities daily	71.4%
Satisfaction Score (Out of Ten) with facilities	6.2

Transport Manager CPC Qualification

FTA Ireland — Celebrating 10 years

Certificate of Professional Competence (CPC) in Road Transport Operations Management

Do you have a succession plan or CPD programme in place for your transport manager and planners?

If you want to pursue a career in transport and to gain a recognised qualification then you should consider sitting a Certificate of Professional Competence (CPC) in Transport Management.

Good succession planning protects your business in the event of a key member's retirement or untimely departure. Not only does it mean the business is prepared, it also gives employees a direction and goal to work towards. If employees know you are investing in their training and development within the company, then they will more likely buy into and commit to the long-term business objectives.

The course is designed for those who need to obtain the Transport Management CPC Qualification to act as transport manager for a road transport business (haulage and passenger). It is also beneficial for those who want to upskill and enhance their career opportunities. The course is delivered on a part-time basis to enable students sufficient time to study and review material between classes and work commitments.

For bookings please contact:
Tel: 01 8447516/Email: info@ftai.ie

Exam
The training is run in conjunction with the examinations set by CILT

Delivery method
Blended delivery incorporating classroom presentation and on-line training.

Course cost
Price on application
Cost includes:

- CILT training manual
- FTA Ireland designed study workbooks
- questions and answer books; copies of past papers
- mock exam
- morning and afternoon tea/coffee and lunch (in classroom only)

01 8447516 info@ftai.ie www.fta.ie


TAGS
CARDS
CARDS OR
NO CHANGE GIVEN
NO RECEIPTS GIVEN
€1.40
EXACT EURO COINS ONLY
€1.40
COSELFRET
45
MTL

Market Data Appendix

To provide context to our research findings, across the following pages are key data points relevant the operation of commercial vehicle fleets in Ireland. This includes...

- **Fleet Population**
- **Fleet Ages**
- **Fleet Fuel Types**
- **Fleet Licences**
- **Motor Tax Rates**
- **Inflation**
- **Fuel Costs**

Fleet Population

The following table illustrates the number, weight, age and fuel types of mechanically propelled goods vehicles as at 31 December across selected time periods.

Number of Goods Vehicles, 2000-2020

Year	Goods Vehicles	Growth (%)
2000	205,575	8.9%
2001	219,510	6.8%
2002	233,069	6.2%
2003	251,130	7.7%
2004	268,082	6.8%
2005	286,548	6.9%
2006	318,064	11.0%
2007	345,874	8.7%
2008	351,307	1.6%
2009	343,940	-2.1%
2010	327,096	-4.9%
2011	320,966	-1.9%
2012	309,219	-3.7%
2013	317,849	2.8%
2014	317,378	-0.1%
2015	330,541	4.1%
2016	342,259	3.5%
2017	349,143	2.0%
2018	355,273	1.8%
2019	366,760	3.2%
2020	377,890	3.0%

Source: https://www.gov.ie/

Number of Goods Vehicles by Weight, 2020

Unladen Weight (Kilograms)	Number used for carriage of goods for hire or reward	Number used for carriage of licencee's goods only	Total Number of Goods Vehicles
Not Exceeding 610	36	1,173	1,209
611 - 813	0	50	50
814 - 1,016	20	505	525
1,017 - 1,270	632	20,205	20,837
1,271 - 1,524	2,434	75,476	77,910
1,525 - 1,778	1,640	43,512	45,152
1,779 - 2,032	2,810	86,701	89,511
2,033 - 2,286	1,862	59,701	61,563
2,287 - 2,540	899	24,921	25,820
2,541 - 2,794	405	8,608	9,013
2,795 - 3,048	194	3,533	3,727
3,049 - 3,302	48	952	1,000
3,303 - 3,556	65	854	919
3,557 - 3,810	89	832	921
3,811 - 4,064	61	856	917
4,065 - 5,080	374	2,468	2,842
5,081 - 6,096	318	1,844	2,162
6,097 - 7,112	220	1,334	1,554
7,113 - 8,128	387	1,870	2,257
8,129 - 9,144	496	2,630	3,126
9,145 - 10,160	433	1,826	2,259
10161 - 11,176	567	2,226	2,793
11177 - 12,192	1,044	3,697	4,741
12,193 - 13,028	683	2,558	3,241
13,209 - 14,224	796	2,699	3,495
14,225 - 15,240	788	2,441	3,229
15,241 plus	1,338	4,901	6,239
Sub-Total	**18,639**	**358,373**	**377,012**
Electrically Propelled			
Not Exceeding 1270 kilos	0	9	8
Exceeding 1270 kilos	73	796	869
Total	**18,712**	**359,178**	**377,890**

Source: https://www.gov.ie/

Fleet Ages

Age of Goods Vehicles, 2018-2020

Age of Vehicles (at 31st December, 2018)	Goods Vehicles	Share (%)
4 Years old and over	250,493	70.5%
6 Years old and over	213,393	60.1%

Age of Vehicles (at 31st December, 2019)	Goods Vehicles	Share (%)
4 Years old and over	260,512	71%
6 Years old and over	211,155	57.6%

Age of Vehicles (at 31st December, 2020)	Goods Vehicles	Share (%)
4 Years old and over	279,013	73.8%
6 Years old and over	218,188	57.7%

Source: https://www.gov.ie/

Year First Licensed	Goods Vehicles	Share (%)
2020	20,577	5.4%
2019	25,145	6.6%
2018	26,769	7.1%
2017	26,386	7.0%
2016	32,007	8.5%
2015	28,818	7.5%
2014	22,735	6.0%
2013	17,447	5.0%
2012	14,794	3.9%
2011	14,260	3.8%
2010	11,534	3.1%
2009	8,774	2.3%
2008	21,561	5.6%
2007	26,577	7.0%
2006	22,821	6.0%
2005	17,331	4.6%
2004 and earlier	40,354	10.6%
Total	**377,890**	**100.0%**

Source: https://www.gov.ie/

Fleet Fuel Types

Fuel Type of Goods Vehicles, 2019-2020

Fuel Type 2020	Goods Vehicles	Share (%)
Petrol	648	0.172%
Diesel	376,102	99.527%
Petrol and Electrical	67	0.018%
Diesel and Electrical	26	0.007%
Petrol and Ethanol	0	0.000%
Electric	878	0,232%
Petrol Plug-in Hybrid Electrical	96	0.025%
Diesel Plug-in Hybrid Electrical	7	0.002%
Other	66	0.017%
Total	**377,890**	**100.000%**

Fuel Type 2019	Goods Vehicles	Share (%)
Petrol	611	0.167%
Diesel	365,516	99.661%
Petrol and Electrical	65	0.018%
Diesel and Electrical	5	0.001%
Petrol and Ethanol	0	0.000%
Electric	454	0.124%
Petrol Plug-in Hybrid Electrical	57	0.016%
Diesel Plug-in Hybrid Electrical	0	0.000%
Other	52	0.014%
Total	**366,760**	**100.000%**

Source: https://www.gov.ie/

Fleet Licences and Sizes

The following tables analyse licence numbers by fleet size for the haulage sector in Ireland. Data, analysed by fleet size, for own account operators Is not readily available.

Year	Total no. of licences (National and International)	Licences with 0-1 vehicles (and category share of overall numbers)	Licences with 2-3 vehicles
2015	3,814	1,791 (47.0%)	936 (24.5%)
2016	3,767	1,677 (44.5%)	936 (24.8%)
2017	3,845	1,642 (42.7%)	937 (24.3%)
2018	3,876	1,742 (44.9%)	945 (24.4%)
2019	3,873	1,727 (44.6%)	926 (24.0%)
2020	3,782	1,643 (43.4%)	916 (24.2%)
2021	3,807	1,610 (42.3%)	898 (23.6%)

Year	Licences with 4-5 vehicles	Licences with 6-10 vehicles
2015	367 (9.6%)	376 (9.9%)
2016	365 (9.7%)	399 (10.6%)
2017	421 (11%)	414 (10.8%)
2018	375 (9.7%)	396 (10.2%)
2019	380 (9.8%)	416 (10.7%)
2020	381 (10.1%)	411 (10.9%)
2021	395 (10.4%)	343 (11.4%)

Year	Licences with 11-20 vehicles	Licences with >20 vehicles
2015	215 (5.6%)	129 (3.4%)
2016	244 (6.5%)	146 (3.9%)
2017	268(7.0%)	163 (4.2%)
2018	270 (7.0%)	148 (3.8%)
2019	269 (6.9%)	155 (4.0%)
2020	270 (7.1%)	161 (4.3%)
2021	297 (7.8%)	173 (4.5%)

Source: www.dttas.gov.ie

The number and share of companies operating in the licensed haulage sector with a fleet size of ten or more vehicles has increased from 10.5% of licences in 2015, to 13.9% in 2021. At the same time, the number and share of companies operating with one, two or three vehicles is falling, with a share of 65.9% in 2021, down from 71.5% in 2015.

Of those companies in the licensed haulage sector with ten or more vehicle licences since 2015, an increasing number and share (now 76.6%) are undertaking international activities.

Year	Licences with 10+ vehicles (and category share of overall numbers)	National licences with 10+ vehicles (and category share of 10+ numbers)	International licences with 10+ vehicles (and category share of 10+ numbers)
2015	400 (10.5%)	111 (27.8%)	289 (72.2%)
2016	438 (11.6%)	115 (26.2%)	323 (73.8%)
2017	487 (12.7%)	131 (26.9%)	356 (73.1%)
2018	466 (12.0%)	121 (26.0%)	345 (74.0%)
2019	476 (12.2%)	120 (25.0%)	356 (75.0%)
2020	482 (12.7%)	118 (24.5%)	364 (75.5%)
2021	531 (13.9%)	124 (23.4%)	407 (76.6%)

Source: www.dttas.gov.ie

Motor Tax Rates

The basis of assessment is the vehicle detail which facilitates the calculation of the appropriate motor tax fee, e.g. weight for goods vehicles. The basis of assessment for the vehicles below is unladen weight, in kilos.

Electrical Goods Vehicle

Tax Band	Annual Cost (€)
0 - 1500	92
1501 - 3000	333
3001 - 4000	420
4001 - 5000	500
5001 - 6000	500
6001 - 7000	500
7001 - 8000	500

Standard Goods Vehicle

Tax Band	Annual Cost (€)
0 - 3000	333
3001 - 4000	420
4001 - 12000	500
12001 plus	900

General Haulage Tractor

Tax Band	Annual Cost (€)
	333

Source: https://www.motortax.ie/

Inflation

The Consumer Price Index is designed to measure the change in the average level of prices (inclusive of all indirect taxes) paid for consumer goods and services by all private and institutional households in the country and by foreign tourists holidaying in Ireland. It is the official figure for inflation in Ireland.

Consumer Price Index: Annual Average % Change

Year	% Change
2000	5.6
2001	4.9
2002	4.6
2003	3.5
2004	2.2
2005	2.5
2006	4.0
2007	4.9
2008	4.1
2009	-4.5
2010	-1.0
2011	2.6
2012	1.7
2013	0.5
2014	0.2
2015	-0.3
2016	0.0
2017	0.4
2018	0.5
2019	0.9
2020	-0.3

Source: https://www.cso.ie/

Fuel Costs

The table below illustrates the National Average Price (€) for diesel per litre at quarterly intervals over a seven-year period

Fuel Costs per Litre

Month	Diesel Price (€) per Litre
Mar-14	1.473
Jun-14	1.468
Sep-14	1.454
Dec-14	1.339
Mar-15	1.298
Jun-15	1.337
Sep-15	1.219
Dec-15	1.187
Mar-16	1.070
Jun-16	1.173
Sep-16	1.163
Dec-16	1.229
Mar-17	1.267
Jun-17	1.221
Sep-17	1.224
Dec-17	1.270
Mar-18	1.261
Jun-18	1.370
Sep-18	1.367
Dec-18	1.365
Mar-19	1.329
Jun-19	1.365
Sep-19	1.326
Dec-19	1.354
Mar-20	1.323
-Jun-20	1.238
Sep-20	1.254
Dec-20	1.181
Mar-21	1.332
Jun-21	1.389
Sep-21	1.449

Source: https://www.cso.ie/

Further Information and Feedback

Your feedback is welcome, as we look to expand, improve and enhance this report in the years to come.

To provide feedback or to register your interest in taking part in forthcoming research updates, please contact FTA Ireland and / or Analytiqa:

Freight Transport Association Ireland

The Freight Transport Association Ireland CLG is a not-for-profit membership trade association for the Irish freight and logistics industry. We are wholly owned and governed by our members and act solely in advancing their best interests.

FTA Ireland covers all aspects of private and public freight transport, passenger transport and logistics supply chain, including road, rail, sea and air. Our work enhances the influence and image of the freight industry in Ireland by promoting the highest standards of safety and compliance.

Our experience and expertise in the transport industry puts us at the forefront of new information and changes to legislation, ensuring our members are the first to know about the latest developments in supply chain activity and policy.

FTA Ireland
W: http://www.ftai.ie/
T: 01 844 7516

Analytiqa

Analytiqa assists clients across the supply chain to grow and profit in challenging and competitive markets. Analytiqa supports its clients' commercial and strategic objectives through research, analysis and actionable insight. Analytiqa assists 3PLs and industry service providers to win new business and supports manufacturers and retailers to improve the performance of their logistics operations.

Analytiqa provides research, consulting and AEO services globally, along the supply chain, across industry verticals. Analytiqa assists clients' to better understand their 3PLs, customers or competitors, deliver market strategies, identify opportunities for service expansion or merge with, or acquire competitors.

Analytiqa
W: http://www.analytiqa.com
T: 01 640 18 18