

# Report

## Polish ports in 2021

February 2022

**port**   
monitor

## Summary

- In 2021, Polish ports (Gdansk, Gdynia, Szczecin-Swinoujscie) handled a total of over 113 million tonnes of cargo, an increase of 8.9% compared to 2020. Ports also recorded an increase compared to the year before the pandemic (+4.5% compared to 2019).
- All analysed ports recorded an increase in total cargo turnover. For the Port of Gdansk, the increase was special - the port handled over 53 million tonnes, which allowed it to advance to the third position among the largest Baltic ports, ahead of the Port in Primorsk.
- A large increase was recorded in general cargo (+4.8 million tonnes) and fuel (+6.2 million tonnes) - especially noticeable in the Port of Gdansk (+5.2 million tonnes) and in the Port of Gdynia (+0.7 million tonnes). The good result of the Port of Gdynia is due to the expansion of the Fuel Depot in Gdynia Debogorze.
- Container turnover in 2021 increased by 270 166 TEU (+9.3%). For the Port of Gdansk, 2021 brought a promotion to the leading position in container handling, ahead of Port of St. Petersburg. An increase in container handling was also recorded by the Port of Gdynia. In 2021 port gained new feeder and ocean connections.
- A good year for the ro-ro sector. In the ro-ro cargo segment, volumes increased compared to 2020 (+10.9% in freight units and +13.4% in passenger cars). At the Port of Gdansk and Szczecin-Swinoujscie, the values from 2021 exceeded the results from 2019.
- Last year brought an increase in passenger service in regular ferry traffic. In 2021, all Polish ports handled 1.6 million passengers, which indicates an increase of nearly 12% compared to 2020, but the number of passengers still differs from the number of passengers served in 2019. In 2021, there was a decrease in passenger traffic by 272 thousand passengers in comparison to 2019. Polish ports are not isolated - most Baltic ports have not yet recorded a return to pre-pandemic values.
- In 2021, a slightly higher number of cruise ship calls was observed, as well as the number of tourists in ports compared to 2020. However, the ongoing pandemic and the related restrictions have not allowed the market to rebuild and return to pre-pandemic figures. Only 13 cruisers were served in the largest Polish port handling cruise traffic - the Port of Gdynia.

## Operational results of the Polish seaports in 2021

In 2021, Polish ports handled a total of 113.1 million tonnes of cargo, which means an increase by 8.9% compared to 2020 (Table 1). It is worth noting that total cargo turnover also increased by 4.5% compared to 2019.

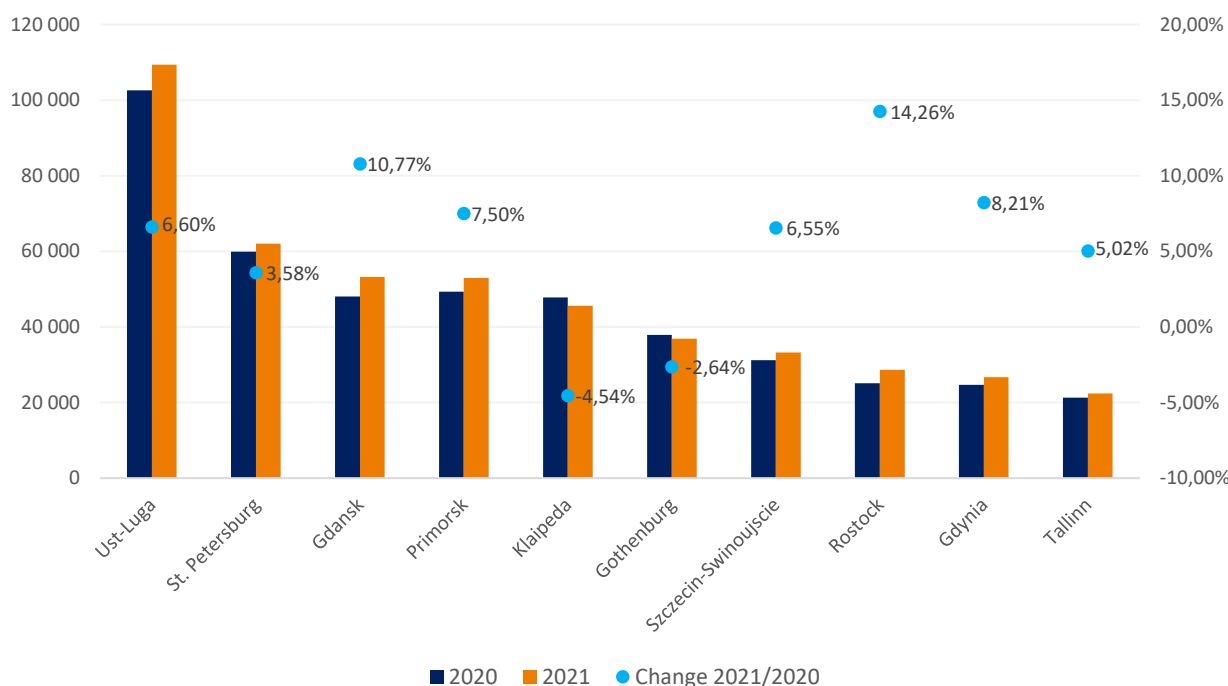
**Table 1. Turnover in the biggest Polish seaports in years 2016-2021 (thousands of tonnes)**

	2016	2017	2018	2019	2020	2021	Change 2020/19
<b>Port of Gdansk</b>	37 289	40 614	49 032	52 154	48 038	53 213	10.77%
<b>Port of Gdynia</b>	19 536	21 225	23 492	23 957	24 662	26 686	8.21%
<b>Port of Szczecin-Swinoujscie</b>	24 113	25 424	28 314	32 175	31 178	33 220	6.55%
<b>Total</b>	<b>80 938</b>	<b>87 263</b>	<b>100 838</b>	<b>108 286</b>	<b>103 878</b>	<b>113 118</b>	<b>8.90%</b>

The largest increase was recorded by the Port of Gdansk, which advanced to the third position on the Baltic Sea in 2021, ahead of the Russian Port of Primorsk. The port's good result is due to the increased handling of liquid fuels and general cargo. The volume of cargo turnover in 2021 in the Port of Gdansk also increased compared to the pre-pandemic data (+2.0% compared to 2019). For the Port of Gdynia and the Port of Szczecin-Swinoujscie, last year also brought an increase in cargo handling (Port of Gdynia +8.21% yoy and Port Szczecin-Swinoujscie +6.6% yoy). The values obtained in 2021 also exceeded the results from 2019, respectively by over 11% at the Port of Gdynia and by 3.3% at the Port of Szczecin- Swinoujscie.

Increases were recorded only in 3 cargo groups out of the seven analysed. There was a significant increase in fuel handling (+6.2 million tonnes, +30.6% yoy) and general cargo (+4.8 million tonnes, +8.9% yoy). The ports also achieved an increase in timber handling (+0.26 million tonnes, but the turnover in the analysed cargo group had a small share in the total turnover of Polish ports (0.4% in 2021).

**Figure 1. The cargo volumes in the largest ports in the Baltic Sea in 2020 and 2021 (thousands of tonnes)**



As for liquid fuels, Polish ports in total handled 26,650.6 thousand tonnes of this type of cargo, which was 30.6% higher than in 2020. All major Polish ports recorded increases. At the Port of Gdansk, which is the largest fuel port in Poland, 18,884.6 thousand tonnes of liquid fuels were handled. This was a result 37.9% higher than in 2020, when fuel turnover collapsed by over 21% compared to 2019 as a result of the pandemic. A very large increase in the Port of Gdynia (+42.0% yoy) is related to the expansion of the Fuel Depot in Gdynia Dębogorze, connected by a direct pipeline to the Liquid Fuel Reloading Station at the Port of Gdynia. Recently, the infrastructure in Dębogorze has increased by two tanks.

Positive changes also took place in the volume of cargo handling in the general cargo group (4.8 million tonnes, +8.9% yoy). The largest nominal increase took place at the Port of Gdansk (+1.2 million tonnes, +5.4% yoy) and this is due to increased container turnover.

On the other hand, there was an impressive growth in percentage terms in the Port of Gdynia (+2.1 million tonnes, +14.8% yoy) - both owing to increased turnover in the ro-ro cargo and container handling. For the Port of Szczecin-Swinoujscie, the recovery in this sector is the result of increased ferry cargo handling (ferry cargo turnover increased by 10.6% yoy and by 7.8% compared to 2019).

Timber handling in Polish ports in 2021 increased by 120.9% and reached the level of 480.9 thousand tonnes. The turnover in this cargo group increased in each of the three main Polish ports: Port of Gdansk (+798.3%), Port of Gdynia (+150.6%), Port of Szczecin-Swinoujscie (+14.3%). The increases reflect the recovery in the timber market after 2020.

In the remaining four cargo groups, the total turnover decreased. The largest decrease took place in the coal and coke group. In this group, declines were recorded by the Port of Gdansk (-15.3%) and the Port of Gdynia (-26.3%), while the turnover in the Port of Szczecin-Swinoujscie increased (+11.8%). Ultimately, however, the total turnover of Polish ports in this cargo group decreased by 10.2%.

It should be noted, however, that the first and second half of the year were different in terms of coal handling in Polish ports, and the final result of coal turnover in the entire year 2021 was influenced by a large decline in the second half of the year compared to the corresponding period of 2020. Major turbulences in global coal markets and a significant increase in the prices of this raw material contributed to the reduction of coal imports to Poland, and this affected port turnover. In the second half of 2021, coal prices on the Polish market were much lower than on global markets. This is mainly due to the fact that domestic coal producers with the largest recipients have signed long-term contracts, and their prices are usually agreed in advance for the entire year.

After the record-breaking 2020 year for Polish ports in terms of grain turnover, the handling of this group decreased by 7.3% in 2021 to the level of 8,163.7 thousand tonnes. However, this result was still 59.0% higher than that recorded in 2019. The Port of Gdynia and the Port of Szczecin-Swinoujscie recorded declines, respectively: -12.3% yoy and -4.8% yoy. At the Port of Gdansk, on the other hand, turnover in this cargo group increased (+7.6% yoy).

In 2021, ore handling decreased by 4.8% to 2,111.2 thousand tonnes compared to 2020. The overall decline was due to reduced turnover in this cargo group in the Port of Gdansk (-58.6% yoy), while at the Port of Szczecin-Swinoujscie, handling increased (+12.2% yoy). The Port of Gdynia does not handle this cargo group.

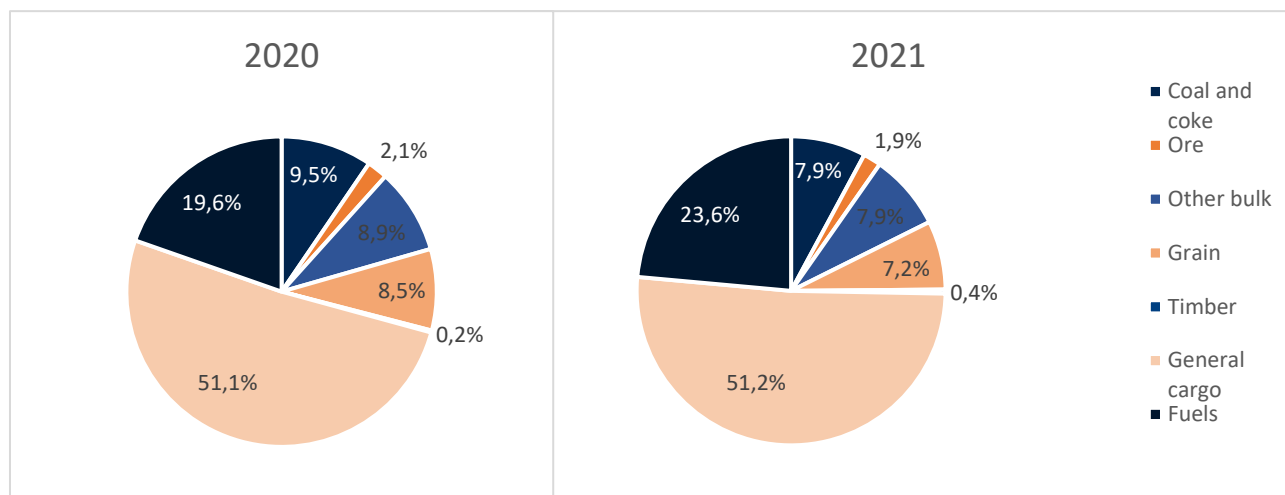
In 2021, turnover in other bulk cargo group also decreased. In total, main Polish ports handled 8,957.7 thousand tonnes of other bulk, which indicated 3% decrease in comparison to 2020. Two ports recorded declines: the Port of Gdansk (-5.8% yoy) and the Port of Szczecin-Swinoujscie (-5.3% yoy), while the Port of Gdynia turnover in other bulk cargo group increased (+9.3% yoy).

**Table 2. Handling structure in ports of Gdansk, Gdynia and Szczecin-Swinoujscie in 2021 (thousands of tonnes)**

Cargo group	Port of Gdansk		Port of Gdynia		Port of Szczecin-Swinoujscie		Total	
	2021	Change 2020/2019	2021	Change 2020/2019	2021	Change 2020/2019	2021	Change 2020/2019
Coal and coke	4 795.8	-15.25%	1 241.4	-26.33%	2 858.2	11.77%	8 895.40	-10.16%
Ore	221.1	-58.61%	0.0	+/-0%	1 890.1	12.21%	2 111.20	-4.85%
Other bulk	4 273.1	-5.75%	1 709.4	9.28%	2 975.2	-5.25%	8 957.70	-3.03%
Grain	1 612.6	7.57%	4 764.9	-12.26%	1 786.2	-4.77%	8 163.70	-7.29%
Timber	106.9	798.32%	255.1	150.59%	118.9	14.33%	480.90	120.90%
General cargo	23 318.5	5.47%	16 199.5	14.82%	18 340.9	8.69%	57 858.90	8.98%
Fuels	18 884.6	37.93%	2 515.9	41.96%	5 250.2	6.24%	26 650.70	30.60%
<b>Total</b>	<b>53 212.5</b>	<b>10.77%</b>	<b>26 686.2</b>	<b>8.21%</b>	<b>33 219.7</b>	<b>6.55%</b>	<b>113 118.40</b>	<b>8.90%</b>

In 2021, the share of liquid fuels in the cargo structure of Polish ports increased (+4 pp). The share of coal and coke decreased to the level of 8% (-2 pp compared to 2020) - Figure 2.

**Figure 2. The structure of cargo handled in the main ports in Poland in 2020 and 2021**



## Containers

Last year, Polish ports handled over 270 thousand TEU more (+9.3%) than in 2020. The results of the ports were also by almost 140 thousand TEU higher than in the record-breaking 2019. The growth in container handling was influenced by the increase in world consumption and the implementation of government policies aimed at increasing economic activity.

Currently, the Port of Gdansk is the largest container port in the Baltic Sea. In 2021, for the first time, the port's annual performance was higher than that of Port of St. Petersburg. The good result is due to the turnover in the DCT terminal. In 2021, the DCT terminal handled a record number of over 2.09 million TEU, which is 9.3% higher than in 2020 and almost 2% higher than in the last year before the pandemic.

The Port of Gdynia also recorded high results. The increase in container handling in the Port of Gdynia was influenced by the launch of new feeder and ocean connections. In February 2021, the Port of Gdynia gained a connection with the port of Hamburg and Bremerhaven served by Maersk. Ships call at the BCT terminal, and then at the ports of the Mediterranean Basin (including Turkey, Tunisia and Algeria). On the other hand, since March last year, ships from the Viasea operator as part of the Gdynia-Oslo-Klaipeda weekly connection, as well as the Unifeeder operator connecting Gdynia with Great Britain, call at the BCT terminal. Due to the growing interest in sea transport to Great Britain after Brexit, in June Containerships launched a connection from the ports of Gdynia and Klaipeda with British Teesport and Tilbury. Among the oceanic connections from / to the Port of Gdynia there is a connection of the MSC operator connecting Gdynia with the Port of Rades in Tunisia as well as India and Pakistan (calling the BCT terminal) and the transatlantic connection of the shipowner Hapag-Lloyd - cargo flows from the GCT terminal directly to North American ports. Both connections are dedicated to Polish exports. Last year turned out to be a record year for the BCT terminal in Gdynia, 573,784 TEU were handled. The GCT terminal also recorded an increase in cargo handling to 411,038 TEU.

The only port with a drop in container handling compared to 2020 is the Port of Szczecin-Swinoujście (- 4,676 TEU, -5.39% yoy). However, the port's results are higher than those obtained in 2019.

**Table 3. Container handling in the biggest Polish seaports in years 2016-2021 (TEU)**

	2016	2017	2018	2019	2020	2021	Change 2021/20
<b>Port of Gdansk</b>	1 299 373	1 580 508	1 948 974	2 073 215	1 923 785	2 117 829	10.09%
<b>Port of Gdynia</b>	642 195	710 698	803 871	896 968	905 121	985 919	8.93%
<b>Port of Szczecin-Swinoujście</b>	90 869	93 579	81 451	76 143	86 816	82 140	-5.39%
<b>Total</b>	<b>2 032 437</b>	<b>2 384 785</b>	<b>2 834 296</b>	<b>3 046 326</b>	<b>2 915 722</b>	<b>3 185 888</b>	<b>9.27%</b>

## Ro-ro ferry traffic

Last year, handling of freight units in Polish ports increased by 10.9% yoy. All ports recorded an increase in service of both passenger cars and freight units. Moreover, at the Port of Gdansk and Szczecin-Swinoujście, the figures from 2021 exceeded the results from 2019. In the case of the Port of Gdynia, handling of cars and freight units returned to the values similar to those before the pandemic. The results of the Port of Gdynia may increase in the near future due to the increased frequency of calls by Finlines to the OT Port Gdynia terminal. From January 2022, the operator offers 6 calls a week.

**Table 4. Ro-ro freight units and passenger cars served in biggest Polish sea ports in years 2020 and 2021 [pcs]**

	Passenger cars			Freight units		
	2020	2021	Change 2021/2020	2020	2021	Change 2020/2019
<b>Port of Gdansk</b>	45 383	53 849	18.65%	28 923	33 213	14.83%
<b>Port of Gdynia</b>	88 143	92 512	4.96%	263 590	297 146	12.73%
<b>Port of Szczecin-Swinoujście</b>	219 037	253 585	15.77%	486 516	534 094	9.78%
<b>Total</b>	<b>352 563</b>	<b>399 946</b>	<b>13.44%</b>	<b>779 029</b>	<b>864 453</b>	<b>10.97%</b>

## Passenger traffic

The reduction of restrictions introduced due to the coronavirus pandemic contributed to positive changes in the passenger service sector last year compared to 2020. In 2021, Polish ports handled 1.6 million passengers in total, i.e. 11.7% more than in 2020. All analyzed ports recorded a year to year growth.

It is worth noting, that despite the increases in ferry segment, the values have not yet returned to the pre-pandemic level. Traffic is lower than in 2019, especially in the Port of Gdynia, which handles tourist

traffic on the Gdynia-Karlskrona line. Last year, the port handled 35.9% fewer passengers than in 2019. Polish ports are not an isolated case - most ports in the Baltic Sea have not yet returned to their pre-pandemic values (including Helsinki, Tallinn and Gothenburg).

**Table 5. Regular passenger traffic in major Polish ports in 2016-2021 [passengers]**

	2016	2017	2018	2019	2020	2021	Change 2021/2020
<b>Port Gdansk</b>	104 672	105 556	117 939	166 475	147 909	162 209	9.67%
<b>Port Gdynia</b>	603 444	660 900	687 545	682 590	394 608	437 569	10.79%
<b>Port Szczecin-Swinoujscie</b>	1 040 779	1 085 013	1 072 679	1 069 318	930 625	1 046 333	12.43%
<b>Total</b>	<b>1 748 895</b>	<b>1 851 469</b>	<b>1 878 163</b>	<b>1 918 383</b>	<b>1 473 142</b>	<b>1 646 111</b>	<b>11.71%</b>

## Cruise traffic

The past year brought an increase in the number of tourists and cruise ships in ports compared to 2020. However, the ongoing pandemic and the related restrictions have not allowed the market to rebuild and return to its pre-pandemic level. Only 13 cruisers were handled in the largest Polish port serving cruise vessels - the Port of Gdynia. In the Port of Szczecin-Swinoujscie, which also serve river cruisers traffic, despite the greater number of ship calls in 2020, fewer passengers were handled than in 2021 due to restrictions on the reduced number of passengers on board.

**Table 6. Cruise traffic in Polish ports in 2020 and 2021 [passengers]**

	Tourists			Calls		
	2020	2021	Change 2021/2020	2020	2021	Change 2021/2020
<b>Port of Gdansk</b>	616	2 281	1 665	6	9	3
<b>Port of Gdynia</b>	72	26 254	26 182	1	13	12
<b>Port of Szczecin-Swinoujscie*</b>	5 650	6 792	1 142	95	89	-6
<b>Total</b>	<b>6 338</b>	<b>35 327</b>	<b>28 989</b>	<b>102</b>	<b>111</b>	<b>9</b>

\*including river cruisers



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