Report

Cargo throughput in Top 10 Baltic ports in 2021 – rebound after tough 2020

February 2021

port monitor

Total cargo turnover in Top 10 Baltic ports

In 2021, the total throughput of the Top 10 Baltic ports increased by **5.21%** to the level of **471.1 million tonnes** in comparison to 2020. The total result of analysed seaports is also 1.57% higher than in the last year before the Covid-19 pandemic - Table 1.

The leading ports in the Baltic Sea are Russian ports. Russian ports had a 47% share in the total cargo turnover of the Top 10 Baltic Ports in 2021.

The leading position is occupied by **Port Ust-Luga**, where general cargo handling increased by 12% yoy, with a significant increase in cargo transported by ferries (+96.6 thou. tonnes +9% yoy). The increase was also recorded in handling of crude oil (+5% yoy) and petroleum products (+4% yoy). In the **Port of St. Petersburg**, handling of general cargo also increased (+13% compared to 2020). Both ports recorded an increase in turnover of coal and coke (+11% yoy in each port). During 2020, global demand for coal diminished by 4.4% in comparison to 2019, but the values in 2021 showed an increase due to economic recovery (+6% yoy).

For the first time, the third position is occupied by the **Port of Gdansk**. Annual cargo turnover in Port of Gdansk exceeded 53 million tonnes in 2021. The port recorded significant increases in the handling of liquid fuels (+37.9% yoy), grain (+7.6% yoy) and general cargo (+5.5% yoy). Other Polish ports, ranked in 7th and 9th position, were also characterized by increases in cargo handling. In the Port of Szczecin - Swinoujscie, the total cargo throughput amounted to 33.2 million tonnes. The turnover decreased only in 2 cargo groups: other bulk (-5.2% yoy) and grain (- 4.8% yoy). Cargo handling results in the Port of Gdynia were record-breaking in 2021. The port recorded an impressive increase in the handling of liquid fuels (+0.7 million tonnes, +42% yoy), as the result of the expansion of the fuel terminal in Gdynia Debogorze.

In **the Port of Primorsk**, the turnover of crude oil increased by 9%, reaching 36.3 million tons. Moreover, handling of crude oil products amounted to 16.6 million tons (+4% compared to 2020). In 2021, cargo handling in the port did not reach the pre-pandemic results. It is worth notice, that 2019 was a record year for the Port of Primorsk, due to high crude oil turnover (47.5 million tonnes in 2019).

According to the data of the International Energy Agency (IEA), due to the reduction in the activity of enterprises caused by the Covid-19 pandemic, the demand for oil in 2020 decreased by 8.6% compared to 2019. In 2021, a recovery in this sector was visible - according to preliminary estimates, the daily oil demand increased by over 5% yoy. According to forecasts, in 2022 the global oil demand is expected to exceed the pre-pandemic values.

Increases in total turnover were also recorded in the **Port of Rostock** (+3.6 million tonnes, +14.26% yoy) and the **Port of Tallinn** (+1 million tonnes, 5% yoy). For the Port of Rostock, the figures in 2021 were record-breaking. The largest increases were recorded in the handling of crude oil and diesel oil (+27% yoy), general cargo (+12% yoy) and ro-ro cargo (+18% yoy).

At the **Port of Tallinn**, liquid bulk cargo has the largest share in total throughput. In 2021 there was a slight decrease in the handling of liquid bulk (-3% yoy). A slight decline in this cargo group was compensated by increases in ro-ro (+16.6% yoy) and dry bulk turnover (+6.3% yoy).

The decrease in the **Port of Klaipeda** (-2.2 million tonnes, -4.54% compared to 2020) is the result of the geopolitical situation – in 2021, the Port of Klaipeda lost supplies of some Belarusian petroleum products and fertilizers. It had a significant impact on port turnover.

In the **Port of Gothenburg**, there was a one-digit decrease in cargo turnover (-2.64% yoy) due to the reduced export of crude oil and energy products. Declines in these groups were to some extent compensated by significant increases in a container and ro-ro cargo handling.

Table 1. The volume of cargo handled in the Top 10 Baltic ports in 2019-2021 [thou. tonnes]

No.		2019	2020	2021	Change 2021/2020	Change 2021/2019
1.	Ust-Luga	103 852	102 602	109 377	6.60%	5.32%
2.	St. Petersburg	59 879	59 884	62 031	3.58%	3.59%
3.	Gdansk	52 154	48 038	53 213	10.77%	2.03%
4.	Primorsk	61 024	49 302	52 998	7.50%	-13.15%
5.	Klaipeda	46 260	47 790	45 619	-4.54%	-1.39%
6.	Gothenburg	38 900	37 900	36 900	-2.64%	-5.14%
7.	Szczecin-Swinoujście	32 175	31 178	33 220	6.55%	3.25%
8.	Rostock	25 700	25 100	28 680	14.26%	11.60%
9.	Gdynia	23 957	24 662	26 686	8.21%	11.39%
10.	Tallinn	19 931	21 327	22 397	5.02%	12.37%
	Total	463 832	447 782	471 121	5.21%	1.57%

Source: Actia Forum based on ports' data

Containers

Despite various difficulties that took place in 2021 on the global container market (obstruction of the Suez Canal, shortage of containers on the global market, as well as high freight rates), the volume of container turnover in the Top 10 Baltic container ports in 2021 increased by **4.56%** in comparison to 2020 (Table 2). In total, the busiest ports in the Baltic handled 9.2 million TEU, which indicates an increase also in comparison to the record-breaking 2019.

In 2021, the annual container turnover of the Port of Gdansk was for the first time the highest in the Baltic. **Port of Gdansk** occupied the leading position in container handling, with an increase of over 10% compared to 2020. In August 2021, the port gained a new feeder connection - the Fields operator's ships call twice a week as part of the Gdansk - Liepaja (Latvia) connection.

Port of St. Petersburg, for the third year in a row, recorded a decrease in cargo turnover. The figures for 2021 present a deepening of the decline to 8% compared to 2019.

The increase in container handling in the **Port of Gdynia** (+8.93% yoy) was influenced by the launch of a new feeder and deep-sea connections. In 2021, the Port of Gdynia gained a connection with Port of Hamburg and Port of Bremerhaven operated by Maersk, the weekly Gdynia-Oslo-Klaipeda connection operated by Viasea, as well as two connections with the United Kingdom: operated by Unifeeder and Containerships.

Also, ocean-going vessels will call the Port of Gdynia as part of the connection with Tunisia, India and Pakistan operated by MSC and the transatlantic connection with the ports of North America operated by Hapag-Lloyd.

Container turnover in the **Port of Gothenburg** increased both in the difficult year 2020 and in 2021. Last year, the port recorded a result of 828 thousand TEU (an increase of 6.7% yoy). For the Port of Gothenburg, this is the largest increase since 2015.

The **Port of Aarhus** recorded a significant increase. Over the last five years, container handling increased by 58%. The high dynamics of growth in 2021 are due to increased handling of reefer containers (+7% yoy). Due to problems with pork production in China, large quantities of pork have been exported to Asia via the Port of Arhus for some time.

A single-digit increase in container turnover took place at the Port of Klaipeda (+4.66% yoy), but the port has not yet returned to the figures of container throughput from the time before the pandemic.

Declines in Finnish ports are the result of a worldwide shortage of shipping containers. At the **Port of Helsinki**, the handling of empty containers decreased by more than 25% compared to 2020. Moreover, in 2021, transit to Russia decreased, which was noticed in the transhipments at the **Port of HaminaKotka**. Transit traffic accounts for approximately 15% of the port's container turnover. In 2021 transhipments decreased by 13% compared to 2020.

The impressive growth in **Port of Kaliningrad** is due to the development of multi-modal (sea-land) container rail connections on the China-Europe line. During the last two years, new container connections with European ports have been launched (including the connection with the Port of Immingham in Great Britain). In October 2021, a new railway terminal with a capacity of 450 000 TEU, dedicated to handling containers in transit traffic between Europe and Asia was opened.

In the **Port of Riga**, container handling decreased both in the segment of loaded (-8.8% yoy) and empty containers (-7% yoy).

Table 2. The volume of containers handling in TOP 10 Baltic container ports in 2019-2021 [TEU]

Lp.		2019	2020	2021	Change 2021/2020	Change 2021/2019
1.	**Gdansk**	2 073 215	1 923 785	2 117 829	10.09%	2.15%
2.	**St. Petersburg**	2 221 724	2 099 649	2 042 358	-2.73%	-8.07%
3.	**Gdynia**	896 968	905 121	985 919	8.93%	9.92%
4.	**Gothenburg**	772 000	776 000	828 000	6.70%	7.25%
5.	**Aarhus**	589 486	657 786	718 000	9.15%	21.80%
6.	**Klaipeda**	703 000	640 148	666 775	4.16%	-5.15%
7.	**HaminaKotka**	677 603	621 402	593 550	-4.48%	-12.40%
8.	**Helsinki**	533 983	509 099	466 658	-8.34%	-12.61%
9.	**Kaliningrad**	324 172	281 249	437 190	55.45%	34.86%
10.	**Riga**	466 890	453 577	415 644	-8.36%	-10.98%
	Total	**9 259 041**	**8 867 816**	**9 271 923**	**4.56%**	**0.14%**

Source: Actia Forum based on ports' data

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Port Monitor is a series of periodic reports regarding the seaports markets in the Baltic Sea, as well as on European and global scale. This reports has been prepared by the Consulting Department at Actia Forum, specializing in market surveys in transport, tourism and environment as well as European projects and business counselling.

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