Baltic Port Market – recent dynamics and future challenges

Bogdan Ołdakowski, Secretary General, Baltic Ports Organization

Baltic Ports & Shipping 2018,
26 September 2018, Riga, Latvia

BPO – who we are?

BPO – Baltic Ports Organization

established
October 10, 1991
Copenhagen

nearly 50 members
major ports in the 9 countries

registered in Estonia
Port of Tallinn headquarter

office in Gdynia
Poland

BPO – who we are?

BPO's mission

The BPO's mission is to **contribute to sustainable development** of maritime transport and the port industry in the Baltic Sea Region, thereby **strengthening its global competitiveness**.

BPO 25th Anniversary

Baltic Ports Conference **2018**

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General Assembly **2018**
New BPO Board elected

Chairman
Dr Kimmo Naski
Port of HaminaKotka

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Member
Ansis Zeltinš
Port of Riga

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Tag Map

What we deal with?

Russian Economy EFFICIENCY 45 Members
Environment
TEN-T/CEF Comprehensive Ports
Green Ports SECA NECA OPS
Sewage
Coperation
Projects The Baltic Sea EU
Overcapacity Synergies Port Package
EU Economy LNG
Too Many Ports Waste From Scrubbers
Relations Baltic Ports Organization

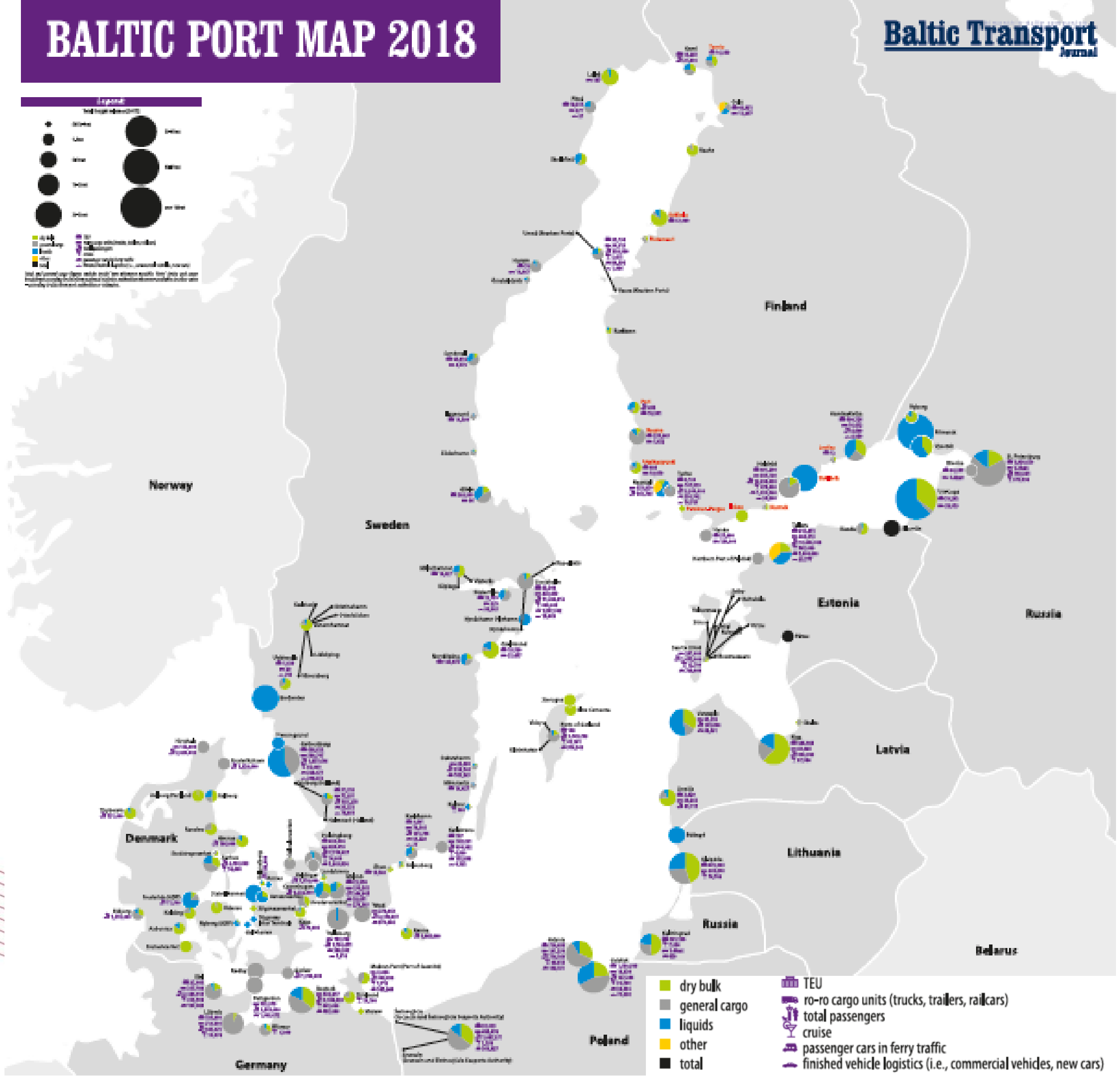
Content

- What is BPO?
- Baltic port market with focus on:
  - Container market
  - Ro-Ro and ferry market
- Same challenges
- Summary

Baltic port market

2010 (mln t)	814.1
2017 (mln t)	909.3
2017/2010 (%)	**+11.7**

Record 2017 > 900 mln t.



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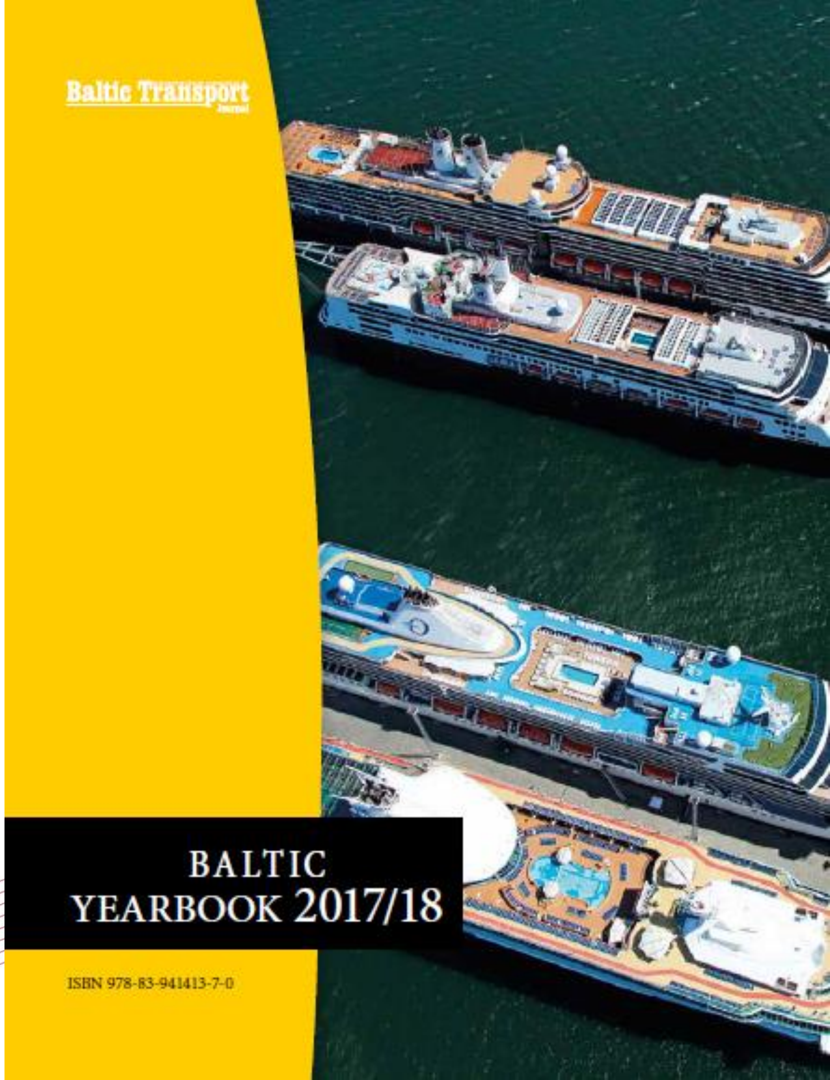
Baltic
Yearbook 2017/18

- statistics
- analyzes
- graphics & maps



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Baltic port market

Tab. 1. Baltic Sea region ports' total cargo turnover in 2016-2017 (thousand tonnes)[1, 2]

№.	Country	2017	2016	2017/2016 [%]
1	Russia	247,494	236,599	+4.6%
2	Sweden	175,314	171,324	+2.3%
3	Finland	109,408	105,016	+4.2%
4	Denmark	94,558	95,831	-1.3%
5	Poland	78,437	72,934	+7.5%
6	Latvia	61,877	63,116	-2.0%
7	Germany	54,453	53,048	+2.6%
8	Lithuania	52,913	49,440	+7.0%
9	Estonia	34,797	33,623	+3.5%
	Total	909,251	880,931	+3.2%

[1] *All tabs.: All Danish seaports*
[2] *All tabs.: German and Russian Baltic seaports only*

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Baltic port market

Tab. 2. Baltic sea region's Top 20 cargo ports in 2017 (thousand tonnes)

№.	Country	Port	2017	2017/2016 [%]
1	RU	Ust-Luga	103,294	+10.6%
2	RU	Primorsk	57,607	-10.6%
3	RU	St. Petersburg	53,649	+10.3%
4	LT	Klaipėda	43,063	+7.7%
5	SE	Gothenburg	40,518	-0.7%
6	PL	Gdańsk	34,005	+7.7%
7	LV	Riga	33,675	-9.2%
8	FI	Sköldvik	24,790	+0.1%
9	PL	Szczecin-Świnoujście	23,453	+9.2%
10	DE	Rostock	20,427	-2.5%
		Total Top 10	**434,481** **Share of total: 47.78%**	**+2.7%** **-0.24pp**
11	SE	Brofjorden	20,400	-0.5%
12	EE	Tallinn	18,944	-5.0%
13	LV	Ventspils	19,981	+6.2%
14	PL	Gdynia	18,662	+5.1%
15	RU	Vysotsk	17,551	+2.6%
16	DE	Lübeck	16,201	+4.5%
17	DK-SE	Copenhagen-Malmö	15,260	-0.9%
18	FI	HaminaKotka	14,665	+11.1%
19	FI	Helsinki	14,227	+22.4%
20	RU	Kaliningrad	13,844	+18.3%
		Total Top 20	**604,216** **Share of total: 66.45%**	**+3.4%** **+0.09pp**

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Baltic port market (liquid bulk)

Tab. 4. Baltic sea region's Top 10 liquid bulk ports in 2017 (thousand tonnes)

№.	Country	Port	2017	2017/2016 [%]
1	RU	Ust-Luga	63,879	+2.2%
2	RU	Primorsk	57,607	-10.6%
3	FI	Sköldvik	24,738	+0.2%
4	SE	Gothenburg	23,281	-2.0%
5	SE	Brofjorden	20,400	-0.5%
6	PL	Gdańsk	13,500	+3.0%
7	LT	Klaipėda	10,676	-4.4%
8	LV	Ventspils	10,639	-2.6%
9	RU	Vysotsk	10,422	-4.9%
10	LT	Būtingė	9,851	+5.7%
		Total	**244,993** **Share of total liquid bulk: 71.23%**	**-2.5%** **+0.50pp**

Baltic port market (dry bulk)

Tab. 6. Baltic sea region's Top 10 dry bulk ports in 2017 (thousand tonnes)

No.	Country	Port	2017	2017/2016 [%]
1	RU	Ust-Luga	36,137	+30.4%
2	LV	Riga	20,485	-7.5%
3	LT	Klaipėda	19,113	+15.0%
4	PL	Gdańsk	9,140	+0.1%
5	RU	St. Petersburg	9,139	+16.7%
6	PL	Szczecin-Świnoujście	8,170	-1.8%
7	DE	Rostock	7,437	-6.1%
8	PL	Gdynia	7,200	+1.7%
9	RU	Vysotsk	7,129	+16.0%
10	SE	Luleå	6,974	+11.9%
		Total	**205,226** **Share of total dry bulk: 51.62%**	**+9.9%** **-0.21pp**

Baltic port market (general cargo)

Tab. 7. Baltic Sea region ports' general cargo turnover in 2016-2017 (thousand tonnes)

№.	Country	2017	2016	2017/2016 [%]	Share of total 2017 [%]	Share of total 2016 [%]	Share 2017-share 2016 [pp]
1	Sweden	80,552	77,326	+4.2%	45.95%	45.13%	+0.81pp
2	Finland	44,968	41,790	+7.6%	41.10%	39.79%	+1.31pp
3	Russia	43,401	41,213	+5.3%	17.54%	17.42%	+0.12pp
4	Germany	36,910	36,358	+1.5%	67.78%	68.54%	-0.75pp
5	Denmark	37,542	34,192	+9.8%	39.70%	35.68%	+4.02pp
6	Poland	30,735	27,379	+12.3%	39.18%	37.54%	+1.64pp
7	Estonia	14,097	12,738	+10.7%	40.51%	37.88%	+2.63pp
8	Lithuania	12,473	12,350	+1.0%	23.57%	24.98%	-1.41pp
9	Latvia	11,010	12,385	-11.1%	17.79%	19.62%	-1.83pp
	Total	**311,688**	**295,731**	**+5.4%**	**34.28%**	**33.57%**	**+0.71pp**

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Baltic port market (general cargo)

Tab. 8. Baltic sea region's Top 10 general cargo ports in 2017 (thousand tonnes)

№.	Country	Port	2017	2017/2016 [%]
1	RU	St. Petersburg	37,111	+8.4%
2	SE	Gothenburg	16,912	+0.5%
3	DE	Lübeck-Travemünde	15,100	+4.2%
4	LT	Klaipėda	13,274	+9.8%
5	FI	Helsinki	12,079	+14.1%
6	PL	Gdańsk	11,365	+21.9%
7	SE	Trelleborg	11,216	+2.8%
8	PL	Szczecin-Świnoujście	9,753	+6.1%
9	DE	Rostock	9,490	-1.9%
10	FI	HaminaKotka	9,262	+11.8%
		Total	145,562 Share of total general cargo: 46.70%	+7.3% +0.84pp

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Baltic container port market

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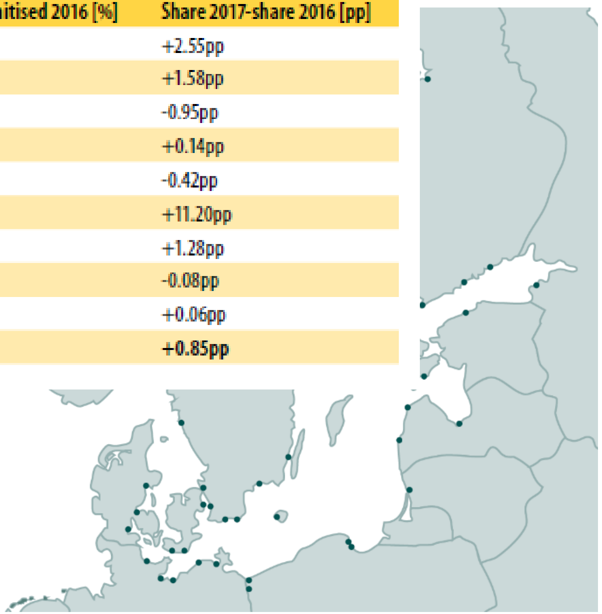
Baltic container port market

Source: Baltic yearbook 2017/2018

Baltic port container market

Tab. 15. Baltic Sea region ports' containerised freight turnover in 2016-2017 (million tonnes)

№.	Country	2017	2016	2017/2016 [%]	Share of unitised 2017 [%]	Share of unitised 2016 [%]	Share 2017-share 2016 [pp]
1	Russia	24.8	22.5	+10.2%	57.14%	54.59%	+2.55pp
2	Poland	17.1	14.8	+15.5%	55.64%	54.06%	+1.58pp
3	Sweden	13.4	13.6	-1.5%	16.64%	17.59%	-0.95pp
4	Finland	13.3	12.3	+8.1%	29.58%	29.43%	+0.14pp
5	Denmark	6.1	5.7	+7.0%	16.25%	16.67%	-0.42pp
6	Latvia	4.7	3.9	+20.5%	42.69%	31.49%	+11.20pp
7	Lithuania	4.3	4.1	+4.9%	34.47%	33.20%	+1.28pp
8	Germany	2.0	2.0	+/-0.0%	5.42%	5.50%	-0.08pp
9	Estonia	2.0	1.8	+11.1%	14.19%	14.13%	+0.06pp
	Total	**87.7**	**80.7**	**+8.7%**	**28.14%**	**27.29%**	**+0.85pp**



Tab. 17. Baltic Sea region ports' total container traffic in 2016-2017 (thousand TEUs)

№.	Country	2017	2016	2017/2016 [%]
1	Poland	2,385	2,043	+16.7%
2	Russia	2,235	2,018	+10.8%
3	Finland	1,635	1,510	+8.3%
4	Sweden	1,560	1,506	+3.6%
5	Denmark	820	764	+7.3%
6	Lithuania	472	442	+6.8%
7	Latvia	450	388	+16.0%
8	Estonia	230	204	+12.7%
9	Germany	163	105	+55.2%
	Total	**9,950**	**8,980**	**+10.8%**

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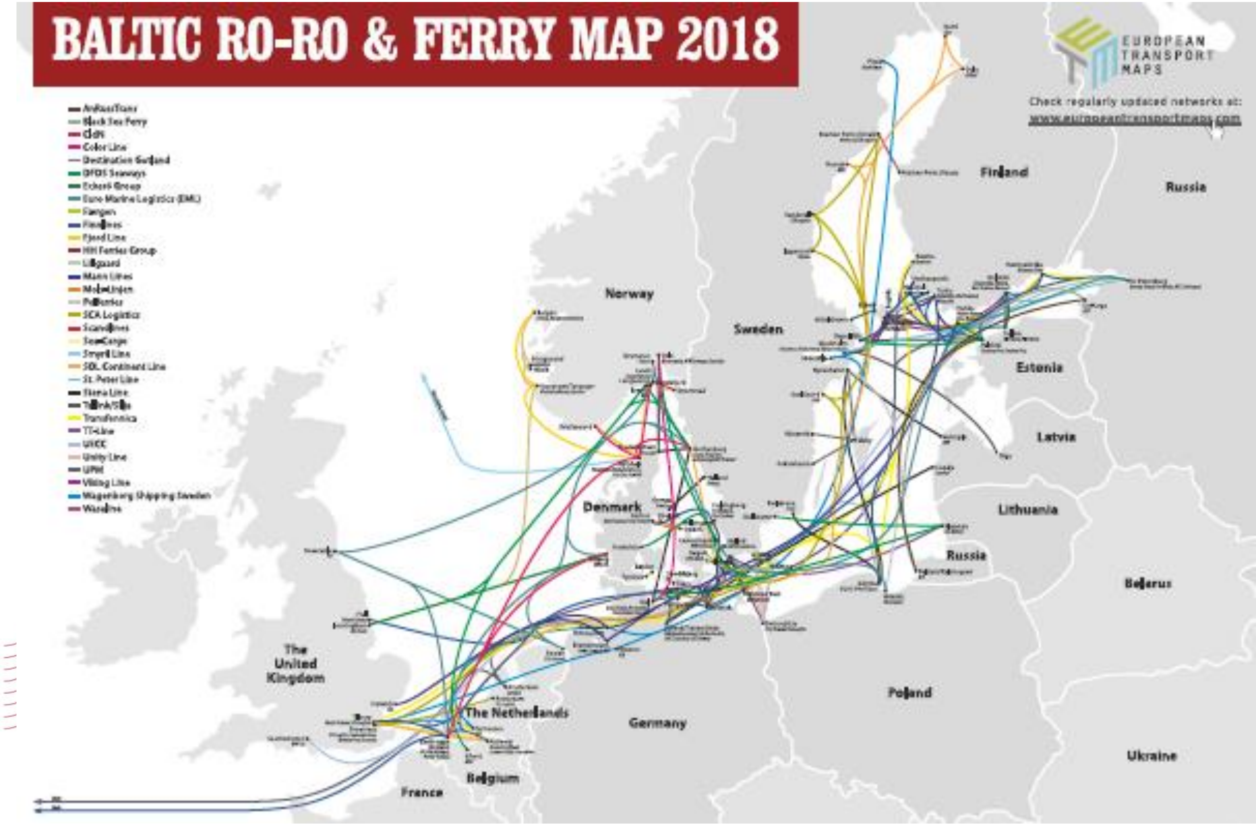
Baltic port container market

Tab. 18. Baltic Sea region's Top 10 container ports in 2016-2017 (thousand TEUs)

№.	Country	Port	2017	2017/2016 [%]
1	RU	St. Petersburg	1,921	+10.1%
2	PL	Gdańsk	1,581	+21.7%
3	PL	Gdynia	711	+10.7%
4	FI	HaminaKotka	687	+9.4%
5	SE	Gothenburg	639	-19.6%
6	DK	Aarhus	513	+12.7%
7	FI	Helsinki	491	+8.9%
8	LT	Klaipėda	473	+6.8%
9	LV	Riga	446	+15.5%
10	FI	Rauma	278	+8.6%
		Total	7,740 Share of total container traffic: 77.79%	+9.0% -1.61pp

Baltic Ro-Ro and ferry market



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Baltic Ro-Ro and ferry market

Tab. 11. Baltic Sea region ports' wheeled freight (ro-ro) turnover in 2016-2017 (million tonnes)

№.	Country	2017	2016	2017/2016 [%]	Share of unitised 2017 [%]	Share of unitised 2016 [%]	Share 2017-share 2016 [pp]
1	Sweden	48.3	46.2	+4.5%	59.96%	59.75%	+0.21pp
2	Germany	28.2	28.5	-1.1%	76.40%	78.39%	-1.99pp
3	Denmark	26.5	24.7	+7.3%	70.59%	72.24%	-1.65pp
4	Finland	16.1	15.4	+4.5%	35.80%	36.85%	-1.05pp
5	Poland	8.9	8.4	+6.0%	28.96%	30.68%	-1.72pp
6	Estonia	6.4	5.9	+8.5%	45.40%	46.32%	-0.92pp
7	Russia	4.3	3.7	+16.2%	9.91%	8.98%	+0.93pp
8	Lithuania	3.0	2.8	+7.1%	24.05%	22.67%	+1.38pp
9	Latvia	2.9	2.8	+3.6%	26.34%	22.61%	+3.73pp
	Total	**144.6**	**138.4**	**+4.5%**	**46.39%**	**46.80%**	**-0.41pp**

Tab. 13. Baltic Sea region ports' total ro-ro & ferry traffic in 2016-2017 (thousand cargo units)[1]

№.	Country	2017	2016	2017/2016 [%]
1	Sweden	3,204	3,032	+5.7%
2	Denmark	2,267	2,158	+5.1%
3	Germany	1,977	1,835	+7.7%
4	Finland	1,104	1,052	+4.9%
5	Estonia	711	672	+5.8%
6	Poland	675	627	+7.7%
7	Lithuania	269	199	+35.2%
8	Latvia	205	175	+17.1%
	Total	**10,412**	**9,750**	**+6.8%**

[1] Data for Russia unavailable

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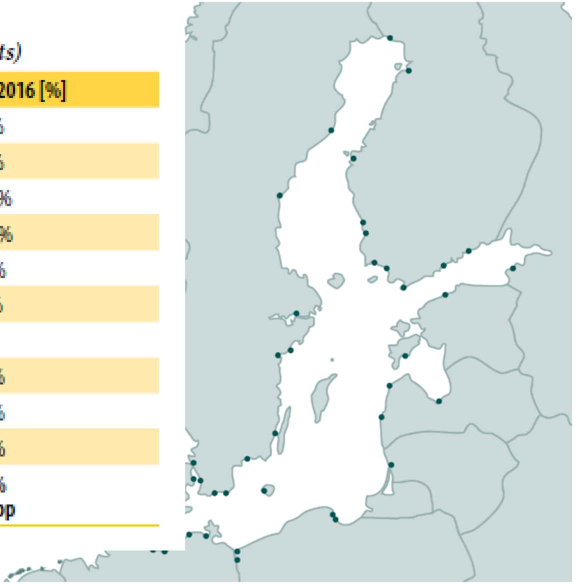
Baltic Ro-Ro and ferry market

Tab. 14. Baltic Sea region's Top 10 ro-ro & ferry ports in 2016-2017 (thousand cargo units)

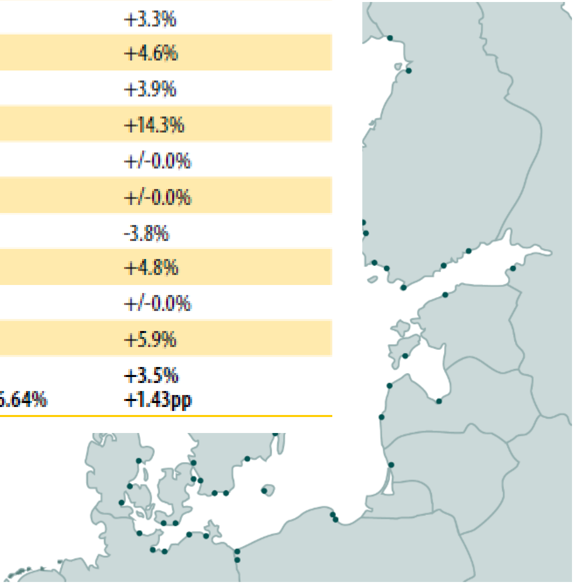
№.	Country	Port	2017	2017/2016 [%]
1	SE	Trelleborg	760	+5.6%
2	DE	Lübeck-Travemünde	710	+2.9%
3	FI	Helsinki	594	+12.3%
4	SE	Gothenburg	582	+10.0%
5	DE	Rostock	521	+4.8%
6	EE	Tallinn	516	+7.5%
7	SE	Stockholm	472	-5.2%
8	PL	Szczecin-Świnoujście	465	+9.2%
9	SE	Ystad	279	+9.0%
10	DK-SE	Copenhagen-Malmö	271	+6.3%
		Total	5,170 Share of total ro-ro & ferry traffic: 49.65%	+5.9% -0.40pp



Baltic port Pax market

Tab. 24. Baltic Sea region's Top 10 passenger ports in 2016-2017 (million)

№.	Country	Port	2017	2017/2016 [%]
1	FI	Helsinki	12.7	+3.3%
2	SE	Stockholm	11.4	+4.6%
3	EE	Tallinn	10.6	+3.9%
4	DE	Rostock	3.2	+14.3%
5	FI	Turku	3.2	+/-0.0%
6	FI	Mariehamn	3.0	+/-0.0%
7	DK	Hirtshals	2.5	-3.8%
8	SE	Ystad	2.2	+4.8%
9	DE	Kiel	2.1	+/-0.0%
10	SE	Trelleborg	1.8	+5.9%
		Total	52.7 Share of total pax traffic: 46.64%	+3.5% +1.43pp



Tab. 23. Baltic Sea region ports' passenger traffic in 2016-2017 (mill

№.	Country	2017	2016	2017/2016 [%]
1	Denmark	33.2	32.8	+1.2%
2	Sweden	30.3	29.8	+1.7%
3	Finland	19.2	18.9	+1.6%
4	Estonia	13.3	12.7	+4.7%
5	Germany	12.1	11.8	+2.5%
6	Poland	2.6	2.6	+/-0.0%
7	Latvia	1.0	0.8	+25.0%
8	Russia	0.9	0.9	+/-0.0%
9	Lithuania	0.4	0.4	+/-0.0%
	Total	113	110.7	+2.1%

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Baltic port market – challenges

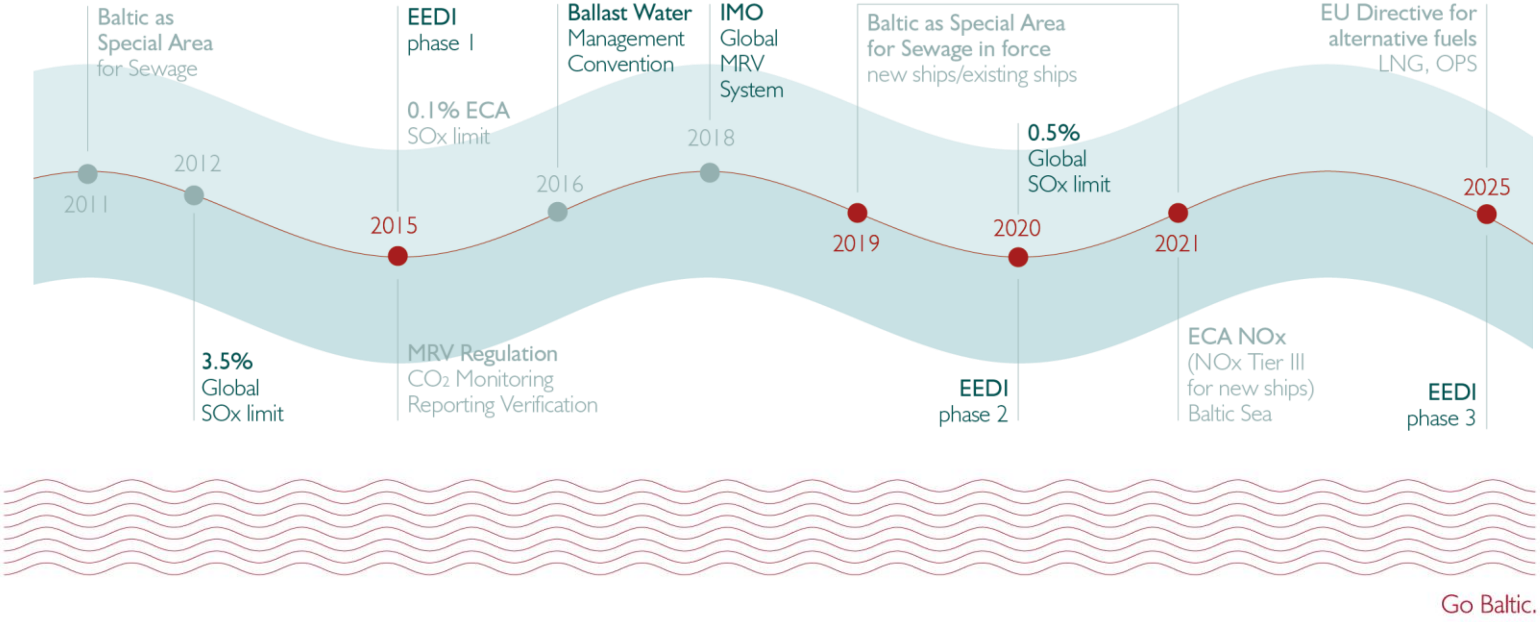
- Will the port market grow? How long?

- European and geopolitical situation
 (Brexit, EU-Russia relations,
 protectionism);

- What will the impact on Baltic port industry be?

- Balancing a need for port investments with uncertainties.

Regulating maritime transport in the Baltic Sea Region



BPO policy

The Baltic Sea as a model region for green ports and maritime transport

BPO voice: The same rules should be applied in all EU

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Download a copy:
http://www.bpoports.com/BPC/Helsinki/BPO_report_internet-final.pdf

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Summary

- Dynamic port market
  - Substantial growth in port market
    - < 900 mln tons
    - 10 mln TEU – 11%
    - Ro-Ro market – 6%
  - Main growth in CEE (incl. Russian) ports

- Outlook for port market is rather positive but there are some challenges

- Baltic as a model region for green ports

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