Baltic port market – recent dynamics and future challenges

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Baltic Ports & Shipping 2019,
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BPO – who we are?

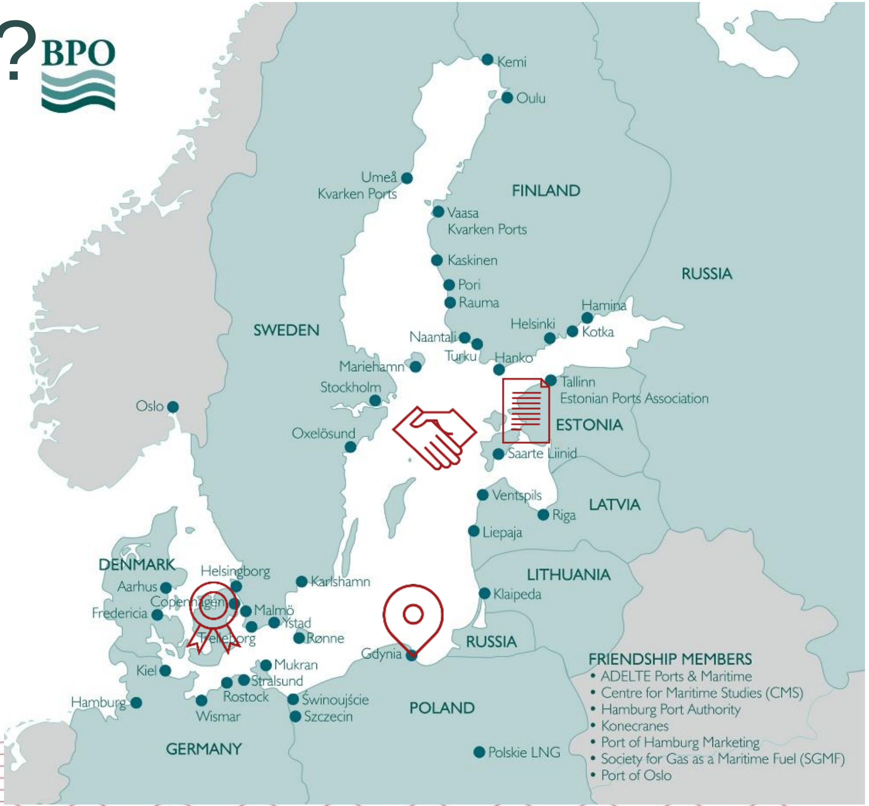
BPO – Baltic Ports Organization

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



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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 Tag Map

What we deal with?

Content

- Baltic port market with focus on:
    - Container market
    - Ro-Ro and ferry market
    - Bulk
- Same challenges
- Summary

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Baltic
Yearbook 2018/19

- statistics
- analyzes
- graphics & maps

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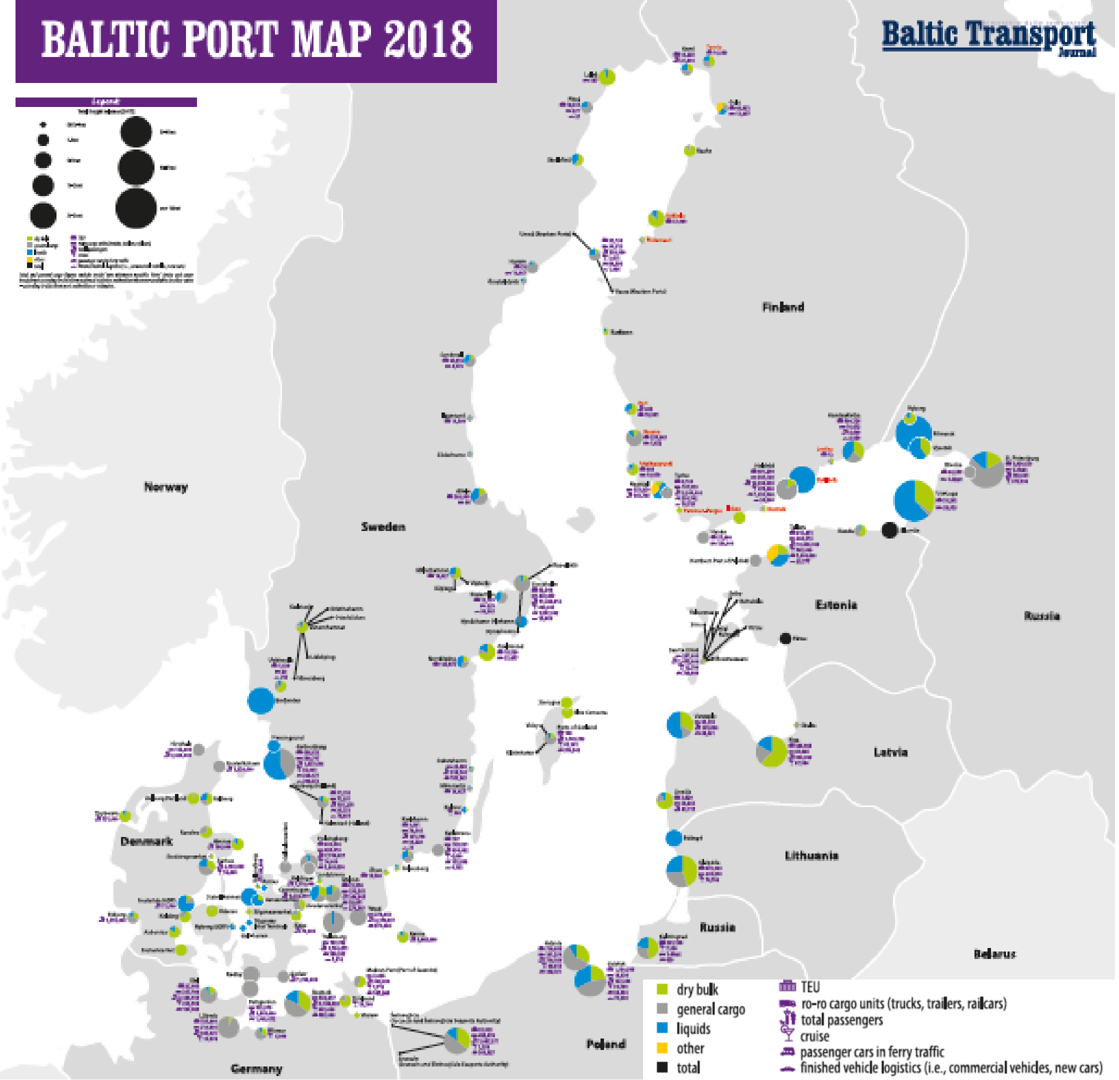
Baltic port market

2010 (mln t)	814.1
2018 (mln t)	942.3
2018/2010 (%)	**+15.7%**

Record 2018 > 942 mln t.



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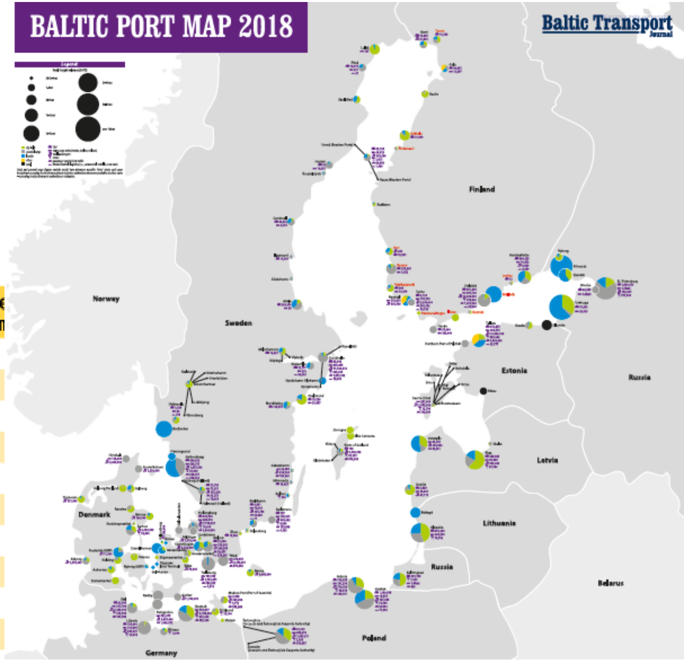
Baltic port market

Tab. 1. Baltic Sea region's ports' total cargo turnover in 2017-2018 (thousand tonnes)[1, 2]

№.	Country	2018	2017	2018/2017 [%]	Share of total 2018 [%]	Share of total 2017 [%]	Share 2018-share [percentage poin
1	Russia	246,317	247,495	-0.5%	26.14%	27.22%	-1.08pp
2	Sweden	179,042	175,314	+2.1%	19.00%	19.28%	-0.28pp
3	Finland	118,041	109,996	+7.3%	12.53%	12.10%	+0.43pp
4	Denmark	95,835	94,638	+1.3%	10.17%	10.41%	-0.24pp
5	Poland	91,991	78,076	+17.8%	9.76%	8.59%	+1.18pp
6	Latvia	66,175	61,878	+6.9%	7.02%	6.81%	+0.22pp
7	Germany	56,480	57,136	-1.1%	5.99%	6.28%	-0.29pp
8	Lithuania	52,463	49,856	+5.2%	5.57%	5.48%	+0.08pp
9	Estonia	35,924	34,797	+3.2%	3.81%	3.83%	-0.01pp
	Total	**942,268**	**909,186**	**+3.6%**			

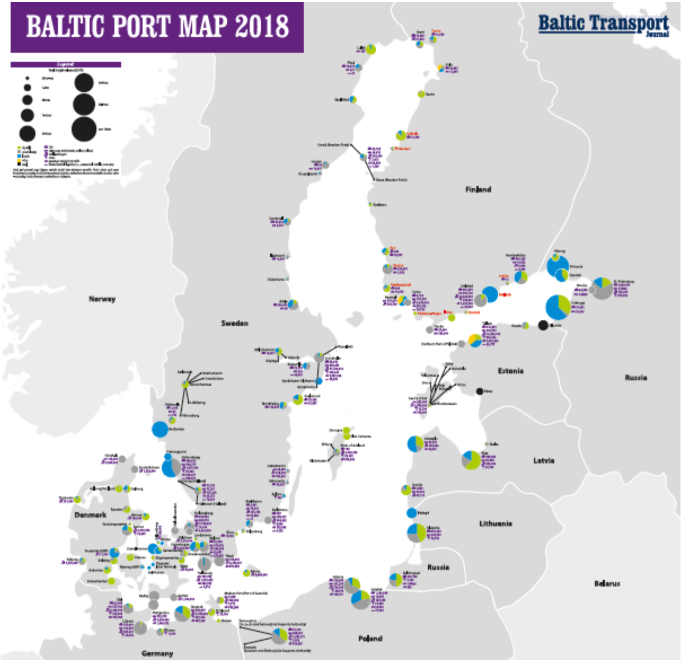
[1] *All tabs.: All Danish seaports*
[2] *All tabs.: German and Russian Baltic seaports only*



Baltic port market

Tab. 2. Baltic Sea region's Top 20 cargo ports in 2018 (thousand tonnes)

№.	Country	Port	2018	2017	2018/2017 [%]
1	RU	Ust-Luga	98,729	103,294	-4.4%
2	RU	St. Petersburg	59,325	53,649	+10.6%
3	RU	Primorsk	53,448	57,607	-7.2%
4	LT	Klaipėda	42,801	40,113	+6.7%
5	PL	Gdańsk	42,492	33,940	+25.2%
6	SE	Gothenburg	40,635	40,518	+0.3%
7	LV	Riga	36,432	33,675	+8.2%
8	PL	Szczecin-Świnoujście	26,169	23,452	+11.6%
9	FI	Sköldvik	24,661	24,790	-0.5%
10	PL	Gdynia	21,113	18,378	+14.9%
		Total Top 10	**445,805**	**429,416**	**+3.8%**
		Top 10's share of total	**47.31%**	**47.23%**	**+0.08pp**
11	EE	Tallinn	20,369	18,944	+7.5%
12	LV	Ventspils	20,326	20,035	+1.5%
13	SE	Brofjorden	20,300	20,400	-0.5%
14	DE	Rostock	19,614	20,427	-4.0%
15	RU	Vysotsk	18,790	17,551	+7.1%
16	DE	Lübeck-Travemünde	16,476	16,201	+1.7%
17	FI	HaminaKotka	16,186	14,665	+10.4%
18	DK-SE	Copenhagen-Malmö	14,741	15,260	-3.4%
19	FI	Helsinki	14,737	14,227	+3.6%
20	RU	Kaliningrad	14,053	13,844	+1.5%
		Total Top 20	**621,397**	**600,970**	**+3.4%**
		Top 20's share of total	**65.95%**	**66.10%**	**-0.15pp**



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Turnover in Polish ports in years 2017-2018 (million tonnes) - 2018 Record Year

	2017	2018	Change 2018/2017
Gdynia	21.23	23.49	10.7%
Szczecin-Świnoujście	25.42	28.61	12.5%
Gdańsk	40.61	49.03	21.0%
Total	**87.26**	**101.14**	**16.0%**

Source: Port Monitor, Actia Forum Ltd

Baltic container port market

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Baltic container port market

Source: Baltic yearbook 2017/2018

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Baltic port container market

Tab. 8. Baltic Sea region's seaports' container traffic in 2017-2018 (thousand TEUs)

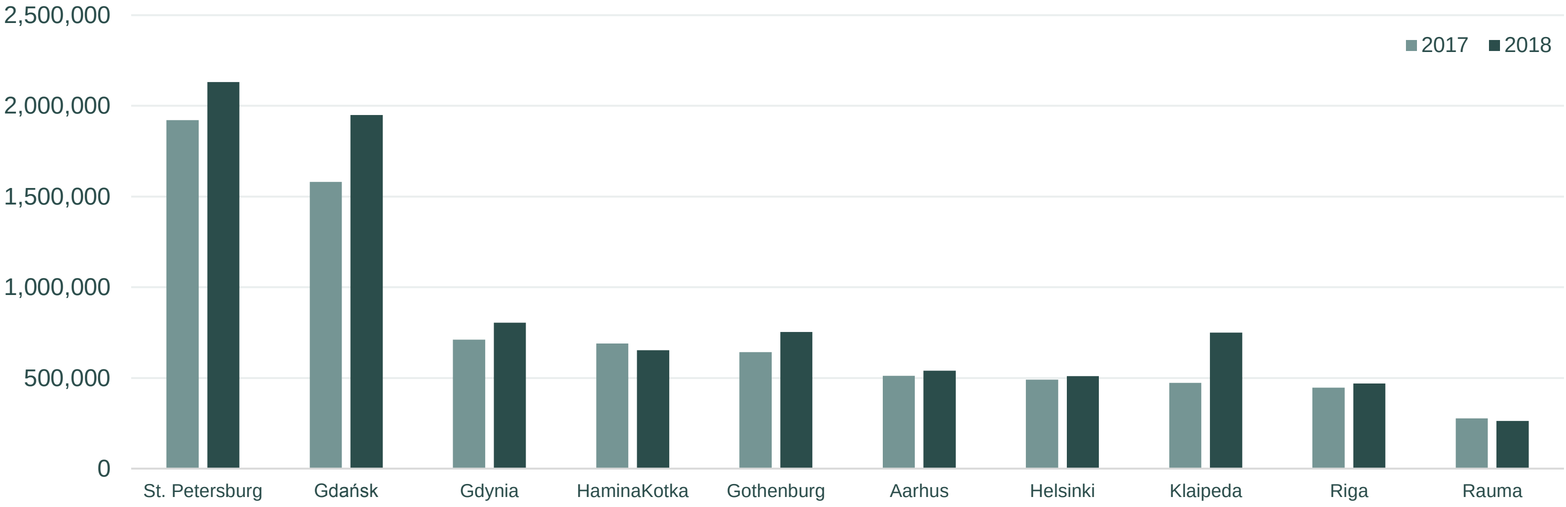
№	Country	2018	2017	2018/2017 [%]
1	Poland	2,818	2,385	+18.2%
2	Russia	2,476	2,235	+10.8%
3	Sweden	1,599	1,560	+2.5%
4	Finland	1,597	1,630	-2.0%
5	Denmark	840	824	+1.9%
6	Lithuania	749	474	+58.0%
7	Latvia	356	338	+5.3%
8	Estonia	241	230	+4.8%
9	Germany	150	163	-8.0%
	Total	**10,826**	**9,839**	**+10.0%**

Baltic port container market

Tab. 18. Baltic Sea region's Top 10 container ports in 2018 (TEUs)

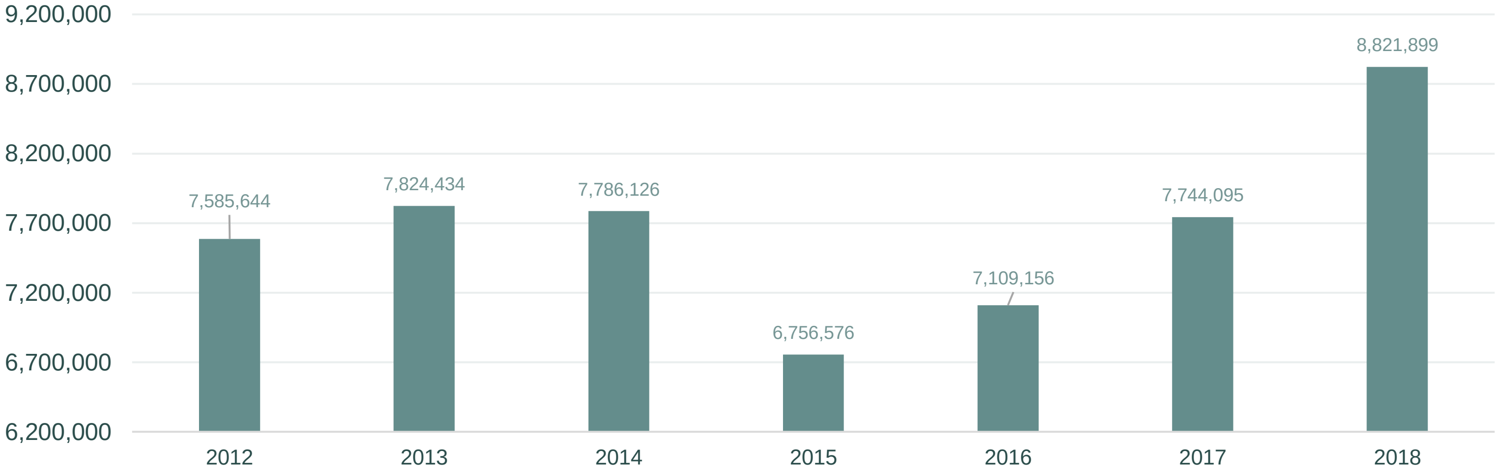
№.	Country	Port	2018	2018/2017 [%]
1	RU	St. Petersburg	2,130,721	+10.9%
2	PL	Gdańsk	1,948,974	+23.3%
3	PL	Gdynia	803,871	+13.1%
4	SE	Gothenburg	749,883	+17.4%
5	LT	Klaipėda	749,066	+58.0%
6	FI	HaminaKotka	649,645	-5.9%
7	DK	Aarhus	540,363	+5.3%
8	FI	Helsinki	509,647	+3.8%
9	LV	Riga	469,342	+5.2%
10	RU	Kaliningrad	276,429	+15.6%
		Total	**8,827,941** **Share of total container traffic: 81.54%**	**+14.6%** **+3.24pp**

TOP 10 Baltic container ports in 2018 and 2017 (+13,92%) [TEU]



Source: Port Monitor, actiaforum.pl/en/

Top 10 Baltic container ports market 2012-2018 [TEU]



Source: Baltic Yearbook 2017/2018, Port Monitor.

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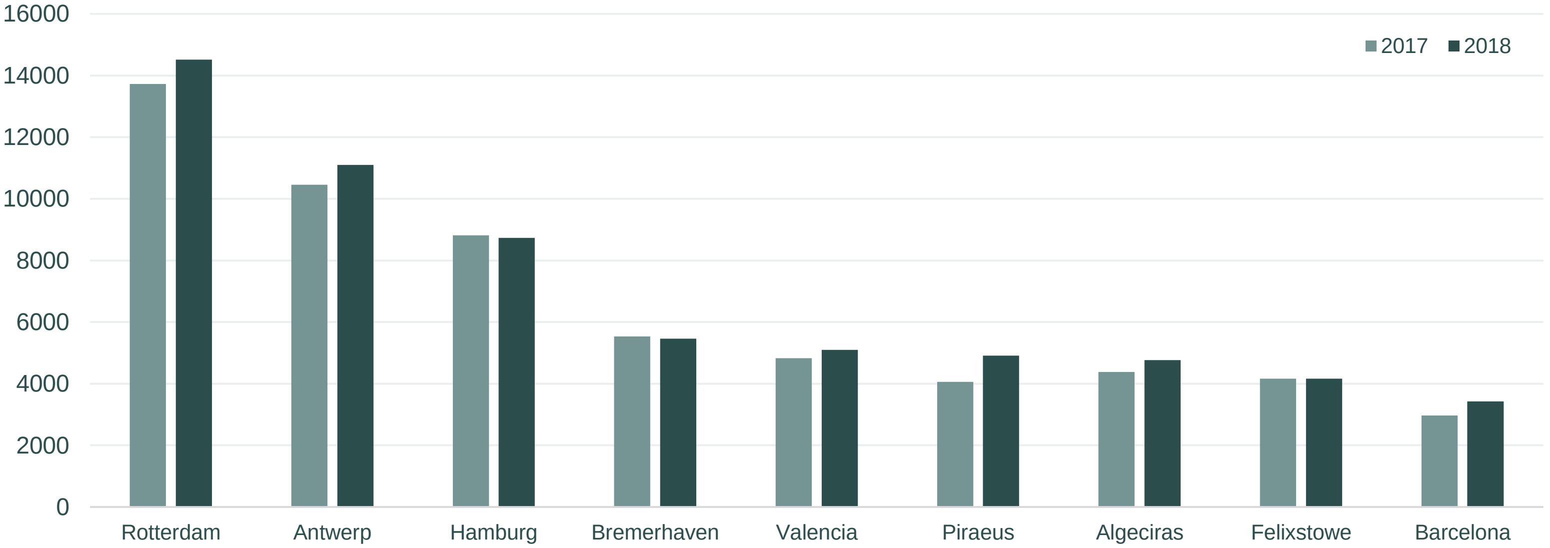
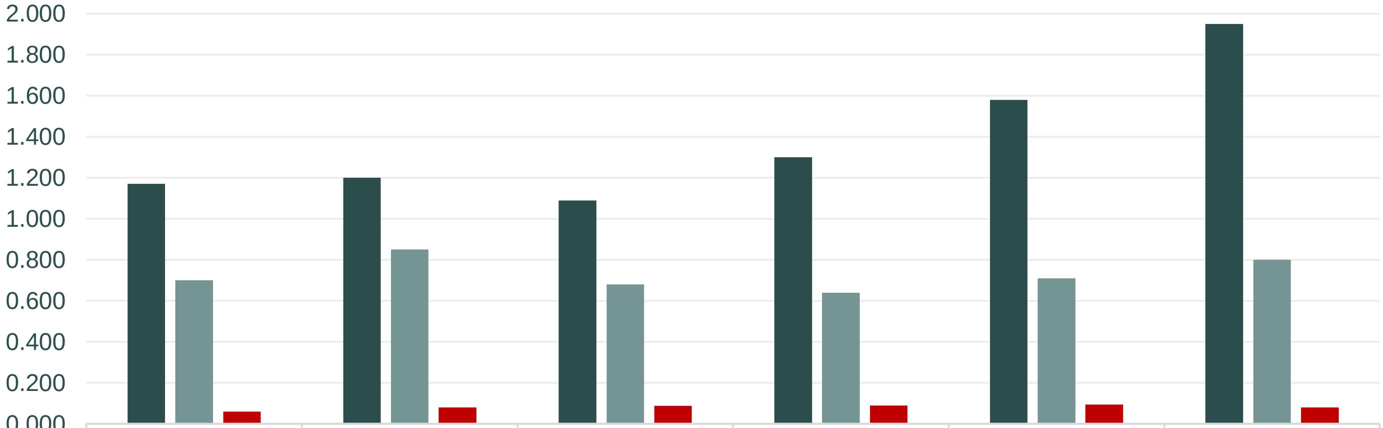
TOP 10 European container ports in 2018 [thou. TEU]



Source: own elaboration based on: Theo Notteboom, Nanyang Technology University Presentation

Container handling in Polish ports in years 2013-2018 [mln TEU]



	2013	2014	2015	2016	2017	2018
Gdańsk	1.170	1.200	1.090	1.300	1.580	1.950
Gdynia	0.700	0.850	0.680	0.640	0.710	0.800
Szczecin-Świnoujście	0.060	0.080	0.088	0.090	0.094	0.080

Source: Port Monitor, Actia Forum Ltd

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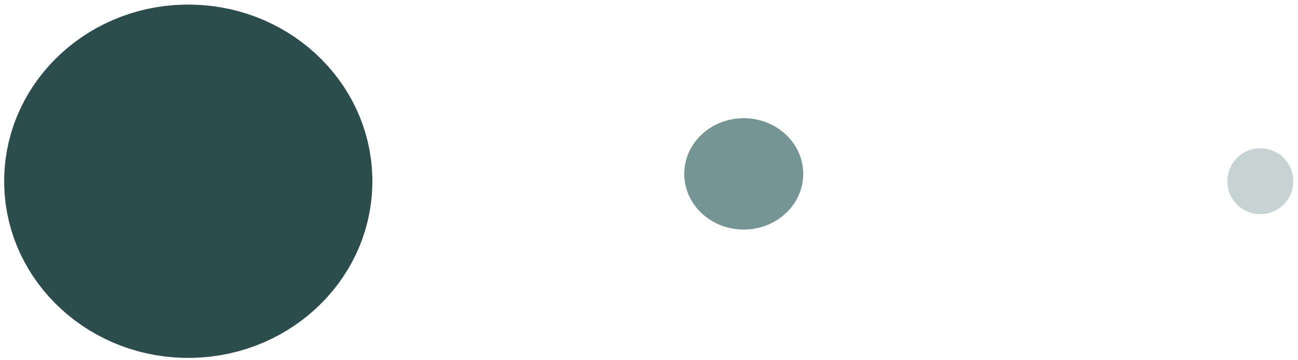
Summary: Container turnover 2018 (TEU)



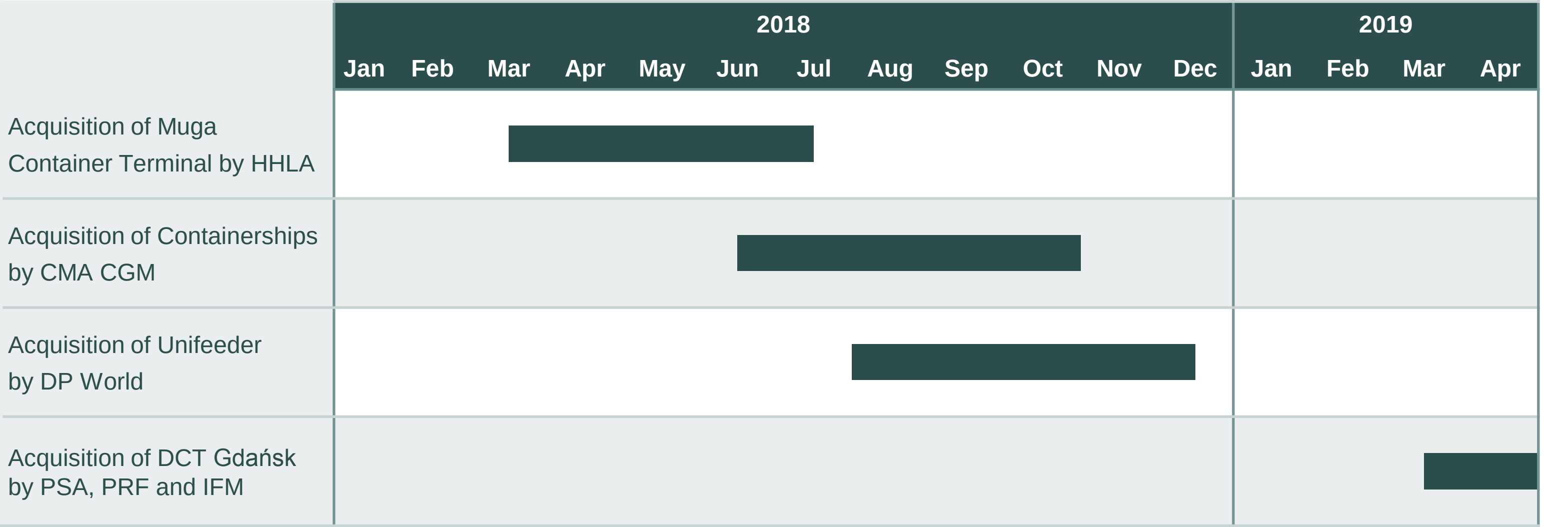
Europe
65 488 000 (100%)
Growth: +5.47%

Baltic
8 821 899 (13,5%)
Growth: +13.9%

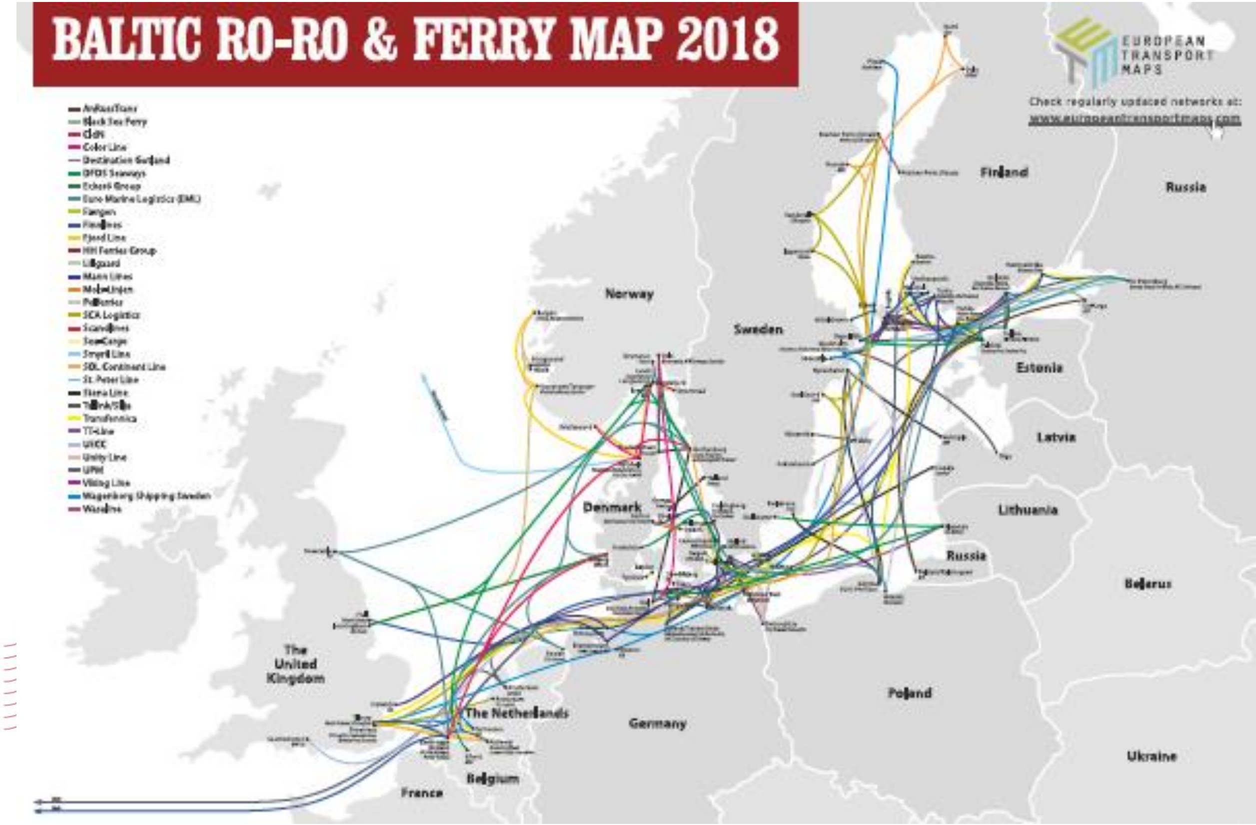
Poland
2 834 296 (4,3%)
Growth: +17,3%

Source: Port Monitor, Actia Forum Ltd

Latest takeovers in container market (shipping lines and terminals) - years 2018/19



Baltic Ro-Ro and ferry market



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Baltic Ro-Ro and ferry market

Tab. 7. Baltic Sea region's seaports' ro-ro & ferry cargo traffic in 2017-2018 (thousand cargo units)[1]

№	Country	2018	2017	2018/2017 [%]
1	Sweden	3,232	3,204	+0.9%
2	Denmark	2,268	2,267	+/-0.0%
3	Germany	2,037	1,977	+3.0%
4	Finland	1,180	1,130	+4.4%
5	Estonia	867	814	+6.5%
6	Poland	687	665	+3.3%
7	Latvia	220	205	+7.3%
8	Lithuania	204	194	+5.2%
	Total	**10,695**	**10,456**	**+2.3%**

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Baltic Ro-Ro and ferry market

Tab. 14. Baltic Sea region's Top 10 wheeled (ro-ro & ferry) freight ports in 2018 (thousand cargo units)

No.	Country	Port	2018	2018/2017 [%]
1	DE	Lübeck-Travemünde	766,158	-8.4%
2	SE	Trelleborg	757,035	-0.4%
3	FI	Helsinki	604,227	+2.9%
4	SE	Gothenburg	555,256	-4.4%
5	DE	Rostock	550,216	+5.7%
6	SE	Stockholm-Nynäshamn-Kapellskär	530,520	+8.5%
7	PL	Szczecin-Świnoujście	496,127	+6.6%
8	EE	Tallinn	465,000	+5.7%
9	SE	Ystad	294,510	+5.7%
10	DK-SE	Copenhagen-Malmö	271,000	-0.4%
		Total	**5,290,049** **Share of total ro-ro & ferry traffic: 49.46%**	**+1.2%** **-0.55pp**

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

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Baltic port market (liquid bulk)

Tab. 4. Baltic Sea region's Top 10 liquid bulk ports in 2018 (thousand tonnes)

№.	Country	Port	2018	2018/2017 [%]
1	RU	Ust-Luga	59,930	-6.2%
2	RU	Primorsk	53,488	-7.2%
3	FI	Sköldvik	24,222	-0.7%
4	SE	Gothenburg	23,520	+1.0%
5	SE	Brofjorden	20,300	-0.5%
6	PL	Gdańsk	15,560	+15.2%
7	RU	Vysotsk	10,897	+4.6%
8	LV	Ventspils	10,490	-1.9%
9	LT	Klaipėda	10,296	-10.4%
10	LT	Būtingė	9,662	-1.8%
		Total	**238,365** **Share of total liquid bulk: 70.42%**	**-2.9%** **-0.76pp**

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Baltic port market (dry bulk)

Tab. 6. Baltic Sea region's Top 10 dry bulk ports in 2018 (thousand tonnes)

№.	Country	Port	2018	2018/2017 [%]
1	RU	Ust-Luga	36,226	+0.2%
2	LV	Riga	23,319	+13.8%
3	LT	Klaipėda	19,865	+3.9%
4	PL	Gdańsk	10,930	+25.5%
5	PL	Szczecin-Świnoujście	9,950	+19.9%
6	RU	St. Petersburg	8,777	-4.0%
7	RU	Vysotsk	7,893	+10.7%
8	SE	Luleå	7,348	+5.4%
9	LV	Ventspils	7,175	+5.0%
10	PL	Gdynia	7,150	+3.4%
		Total	**138,633** **Share of total dry bulk: 53.23%**	**+6.9%** **+1.85pp**

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Baltic port market – challenges

- Will the port market grow? How long?
- Economic growth/trade?
- European and geopolitical situation
  (Brexit, EU-Russia relations,
  protectionism, demography);
- What will the impact on Baltic port industry be?

Summary

- Dynamic port market
  - Substantial growth in port market
    - < 940 mln tons
    - 10 mln TEU < 10%
    - Ro-Ro market – 2-3%
  - Main growth in Poland, Finland, Lithuania, Latvia

- Acquisitions in the container market

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

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