



Baltic general cargo & passenger markets in 2021

by Marek Błuś and Przemysław Myszka

Amidst a relatively flat year overall, the region's general cargo market rolled up its sleeves and walked in leaps and bounds in 2021. Having totalled 342.79mt (+8.8% year-on-year), it is once again Baltic's leading trade. Both its unitised and break-bulk legs made significant advances, up 8.5% yoy to 258.58mt and 9.5% yoy to 84.22mt, respectively. With an increase of 11.9% yoy to 157.90mt, the region's wheeled traffic once again showed it is second to none. The turnover of ro-ro cargo units overtook that of twenty-footers: 11,629k (+11.5% yoy) vs 11,373k (+4.5% yoy). That said, the container market was up, too; with 100.67mt, some 3.6% more than the 2020 result. The coronavirus pandemic was a wee bit less burdensome last year, making it possible for the passenger sector to earn an extra 7.6% yoy in the number of served passengers (59.59m). Generally speaking, not a bad year.

Which, in all probability, won't be possible to say about 2022 once we have the figures...

Tab. 1. The Baltic Sea region's (BSR) ports' cargo turnover in 2020-2021 (thousand tonnes)¹

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Russia	258,580	241,481	+7.1%	28.32%	27.22%	+1.10pp
2	Sweden	168,181	167,594	+0.4%	18.42%	18.89%	-0.47pp
3	Finland	103,727	109,948	-5.7%	11.36%	12.40%	-1.03pp
4	Poland	96,680	88,520	+9.2%	10.59%	9.98%	+0.61pp
5	Denmark	94,255	91,271	+3.3%	10.32%	10.29%	+0.03pp
6	Germany	60,626	54,052	+12.2%	6.64%	6.09%	+0.55pp
7	Lithuania	49,751	51,529	-3.5%	5.45%	5.81%	-0.36pp
8	Latvia	41,731	44,928	-7.1%	4.57%	5.07%	-0.49pp
9	Estonia	39,404	37,688	+4.6%	4.32%	4.25%	+0.07pp
Total		912,935	887,011	+2.9%			

¹ All tabs.: only Russian and German Baltic ports; all Danish ports

Tab. 2. BSR's ports' general cargo turnover in 2020-2021 (thousand tonnes)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Sweden	83,652	78,979	+5.9%	24.40%	25.06%	-0.66pp
2	Russia	48,850	46,162	+5.8%	14.25%	14.65%	-0.40pp
3	Finland	44,207	43,713	+1.1%	12.90%	13.87%	-0.98pp
4	Germany	43,297	37,446	+15.6%	12.63%	11.88%	+0.75pp
5	Denmark	40,520	37,850	+7.1%	11.82%	12.01%	-0.19pp
6	Poland	38,520	35,640	+8.1%	11.24%	11.31%	-0.07pp
7	Estonia	17,984	12,015	+49.7%	5.25%	3.81%	+1.43pp
8	Latvia	13,352	12,362	+8.0%	3.90%	3.92%	-0.03pp
9	Lithuania	12,410	10,949	+13.3%	3.62%	3.47%	+0.15pp
Total		342,792	315,116	+8.8%			
Share of total		37.55%	35.53%	+2.02pp			

Tab. 3. BSR's ports' unitised freight (containerised and wheeled) turnover in 2020-2021 (thousand tonnes)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Sweden	64,269	59,656	+7.7%	24.85%	25.04%	-0.19pp
2	Germany	36,797	31,088	+18.4%	14.23%	13.05%	+1.18pp
3	Denmark	35,837	33,162	+8.1%	13.86%	13.92%	-0.06pp
4	Poland	33,460	30,403	+10.1%	12.94%	12.76%	+0.18pp
5	Russia	32,216	31,662	+1.7%	12.46%	13.29%	-0.83pp
6	Finland	29,194	27,658	+5.6%	11.29%	11.61%	-0.32pp
7	Estonia	9,736	8,424	+15.6%	3.77%	3.54%	+0.23pp
8	Lithuania	9,160	8,348	+9.7%	3.54%	3.50%	+0.04pp
9	Latvia	7,910	7,838	+0.9%	3.06%	3.29%	-0.23pp
Total		258,579	238,239	+8.5%			
Share of general cargo		75.43%	75.60%	-0.17pp			
Share of total		28.32%	26.86%	+1.47pp			



Photo: TT-Line

Tab. 4. BSR's ports' wheeled freight (ro-ro) turnover in 2020-2021 (thousand tonnes)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Sweden	50,078	46,120	+8.6%	31.71%	32.70%	-0.98pp
2	Germany	34,536	29,194	+18.3%	21.87%	20.70%	+1.17pp
3	Denmark	27,856	25,831	+7.8%	17.64%	18.31%	-0.67pp
4	Finland	17,780	15,775	+12.7%	11.26%	11.18%	+0.08pp
5	Poland	10,130	8,747	+15.8%	6.42%	6.20%	+0.21pp
6	Estonia	7,542	6,616	+14.0%	4.78%	4.69%	+0.09pp
7	Russia	3,725	3,241	+14.9%	2.36%	2.30%	+0.06pp
8	Latvia	3,533	3,136	+12.7%	2.24%	2.22%	+0.01pp
9	Lithuania	2,725	2,390	+14.0%	1.73%	1.69%	+0.03pp
Total		157,905	141,050	+11.9%			
Share of unitised		61.07%	59.21%	+1.86pp			
Share of general cargo		46.06%	44.76%	+1.30pp			
Share of total		17.30%	15.90%	+1.39pp			

Tab. 5. BSR's ports' containerised freight turnover in 2020-2021 (thousand tonnes)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Russia	28,491	28,421	+0.2%	28.30%	29.24%	-0.94pp
2	Poland	23,330	21,656	+7.7%	23.17%	22.28%	+0.89pp
3	Sweden	14,191	13,536	+4.8%	14.10%	13.93%	+0.17pp
4	Finland	11,414	11,883	-3.9%	11.34%	12.23%	-0.89pp
5	Denmark	7,981	7,331	+8.9%	7.93%	7.54%	+0.38pp
6	Lithuania	6,435	5,958	+8.0%	6.39%	6.13%	+0.26pp
7	Latvia	4,377	4,702	-6.9%	4.35%	4.84%	-0.49pp
8	Germany	2,261	1,894	+19.4%	2.25%	1.95%	+0.30pp
9	Estonia	2,194	1,808	+21.3%	2.18%	1.86%	+0.32pp
Total		100,674	97,189	+3.6%			
Share of unitised		38.93%	40.79%	-1.86pp			
Share of general cargo		29.37%	30.84%	-1.47pp			
Share of total		11.03%	10.96%	+0.07pp			

Tab. 6. BSR's ports' break-bulk turnover in 2020-2021 (thousand tonnes)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Sweden	19,383	19,323	+0.3%	23.02%	25.13%	-2.12pp
2	Russia	16,639	14,500	+14.8%	19.76%	18.86%	+0.90pp
3	Finland	15,013	16,055	-6.5%	17.83%	20.88%	-3.06pp
4	Estonia	8,248	3,591	+130%	9.79%	4.67%	+5.12pp
5	Germany	6,500	6,358	+2.2%	7.72%	8.27%	-0.55pp
6	Latvia	5,442	4,524	+20.3%	6.46%	5.88%	+0.58pp
7	Poland	5,060	5,237	-3.4%	6.01%	6.81%	-0.80pp
8	Denmark	4,683	4,688	-0.1%	5.56%	6.10%	-0.54pp
9	Lithuania	3,250	2,601	+25.0%	3.86%	3.38%	+0.48pp
Total		84,218	76,877	+9.5%			
Share of general cargo		24.57%	24.40%	+0.17pp			
Share of total		9.22%	8.67%	+0.56pp			

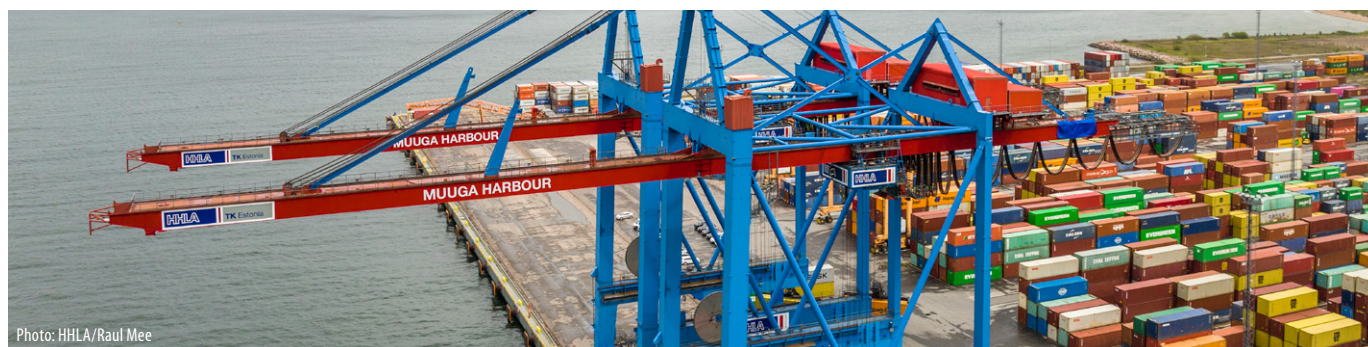


Photo: HHLA/Raul Mee

Tab. 7. BSR's ports' ro-ro cargo units traffic in 2020-2021 (thousand units)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Sweden	3,306	3,070	+7.7%	28.43%	29.43%	-1.01pp
2	Denmark	2,406	2,205	+9.1%	20.69%	21.14%	-0.45pp
3	Germany	2,160	1,885	+14.6%	18.57%	18.07%	+0.50pp
4	Finland	1,255	1,132	+10.9%	10.79%	10.85%	-0.06pp
5	Estonia	967	879	+10.0%	8.32%	8.43%	-0.11pp
6	Poland	864	681	+26.9%	7.43%	6.53%	+0.90pp
7	Lithuania	263	230	+14.3%	2.26%	2.21%	+0.06pp
8	Russia ¹	248	216	+14.8%	2.13%	2.07%	+0.06pp
9	Latvia	160	132	+21.2%	1.38%	1.27%	+0.11pp
Total		11,629	10,430	+11.5%			

¹ Estimated counting 15 tonnes per one cargo unit

Tab. 8. BSR's ports' container traffic in 2020-2021 (thousand TEUs)

Nº	Country	2021	2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Poland	3,185	2,916	+9.2%	28.00%	26.80%	+1.20pp
2	Russia	2,509	2,431	+3.2%	22.06%	22.35%	-0.28pp
3	Sweden	1,639	1,608	+1.9%	14.41%	14.78%	-0.37pp
4	Finland	1,415	1,495	-5.4%	12.44%	13.74%	-1.30pp
5	Denmark	1,061	938	+13.1%	9.33%	8.62%	+0.71pp
6	Lithuania	667	639	+4.4%	5.86%	5.87%	-0.01pp
7	Latvia	435	458	-5.0%	3.82%	4.21%	-0.39pp
8	Germany	235	178	+32.0%	2.07%	1.64%	+0.43pp
9	Estonia	227	216	+5.1%	2.00%	1.99%	+0.01pp
Total		11,373	10,879	+4.5%			

Tab. 9. BSR's ports' Universal Cargo Unit (UCU) traffic in 2020-2021 (thousand UCUs)

Nº	Country	TEUs 2021	TEUs 2020	Ro-ro 2021	Ro-ro 2020	Ro-ro-to-TEU 2021 [x1.5 ratio]	Ro-ro-to-TEU 2020 [x1.5 ratio]	UCU 2021	UCU 2020	yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Sweden	1,639	1,608	3,306	3,070	4,959	4,605	6,598	6,213	+6.2%	22.90%	23.42%	-0.53pp
2	Denmark	1,061	938	2,406	2,205	3,609	3,307.5	4,670	4,245.5	+10.0%	16.21%	16.01%	+0.20pp
3	Poland	3,185	2,916	864	681	1,296	1,021.5	4,481	3,937.5	+13.8%	15.55%	14.85%	+0.71pp
4	Germany	235	178	2,160	1,885	3,240	2,827.5	3,475	3,005.5	+15.6%	12.06%	11.33%	+0.73pp
5	Finland	1,415	1,495	1,255	1,132	1,882.5	1,698	3,297.5	3,193	+3.3%	11.44%	12.04%	-0.60pp
6	Russia ¹	2,509	2,431	248	216	372	324	2,881	2,755	+4.6%	10.00%	10.39%	-0.39pp
7	Estonia	227	216	967	879	1,450.5	1,318.5	1,677.5	1,534.5	+9.3%	5.82%	5.79%	+0.04pp
8	Lithuania	667	639	263	230	394.5	345	1,061.5	984	+7.9%	3.68%	3.71%	-0.03pp
9	Latvia	435	458	160	132	240	198	675	656	+2.9%	2.34%	2.47%	-0.13pp
Total		11,373	10,879	11,629	10,430	17,443.5	15,645	28,816.5	26,524	+8.6%			

¹ Ro-ro traffic estimated by counting 15 tonnes per one cargo unit

Tab. 10. BSR's ports' passenger traffic in 2020-2021 (thousand ferry & cruise travellers)

Nº	Country	2021	2020	Yoy	Share 2021	Share 2020	Share 2021-share 2020 [pp]
1	Denmark	22,369	20,572	+8.7%	37.54%	37.15%	+0.39pp
2	Sweden	17,691	14,162	+24.9%	29.69%	25.57%	+4.11pp
3	Finland	7,160	7,250	-1.2%	12.01%	13.09%	-1.08pp
4	Estonia	5,867	6,427	-8.7%	9.84%	11.61%	-1.76pp
5	Germany	4,181	4,638	-9.9%	7.02%	8.38%	-1.36pp
6	Poland	1,764	1,554	+13.5%	2.96%	2.81%	+0.15pp
7	Lithuania	312	309	+1.0%	0.52%	0.56%	-0.03pp
8	Latvia	250	466	-46.4%	0.42%	0.84%	-0.42pp
–	Russia	–	–				
Total		59,594	55,378	+7.6%			