



Baltic bulk market in 2022

by Marek Błuś and Przemysław Myszka

The Russian war was probably the singular factor influencing our region's bulk trade last year. First, the Russians kept supplying the partners they were left trading with – and did so at an increased pace to at least try to stitch the spread between demand and lower commodity prices. The liquid bulk figures for Ust-Luga and Primorsk do all the talking (making up in excess for the losses noted by St. Petersburg and Vysotsk). The economic situation in the Baltic Sea region in 2022 wasn't all that bad, so tankers continued calling the regional seaports, although from other than Russia directions. The Baltic large-scale LNG terminals in Świnoujście and Klaipėda also earned their corn by pushing out Russian gas from the region's grids. At the same time, turning away from Russian coal added to dry bulk imports, with Poland being the prime example as the country scrambled to take in by sea as much coal as possible before the 2022/2023 winter (with Gdańsk almost doubling its overall dry bulk turnover). Then again, Lithuania's seaport was heavily hit by the disappearance of Belarusian fertilisers previously going over its quays.

Tab. 1. Baltic Sea region's (BSR) ports' bulk turnover in 2021-2022 (thousand tonnes)¹

№	Country	2022	2021	yoy	Country's share of total bulk			Share of country's grand total		
					2022	2021	2022-2021	2022	2021	2022-2021
1	Russia	219,100	209,730	+4.5%	36.54%	36.72%	-0.18%	89.25%	81.11%	+8.14%
2	Sweden	84,647	84,529	+0.1%	14.12%	14.80%	-0.68%	50.31%	50.26%	+0.05%
5	Poland	80,519	58,416	+37.8%	13.43%	10.23%	+3.20%	67.68%	60.42%	+7.26%
3	Finland	61,900	59,520	+4.0%	10.32%	10.42%	-0.10%	58.09%	57.38%	+0.70%
4	Denmark	56,314	54,535	+3.3%	9.39%	9.55%	-0.16%	57.94%	57.86%	+0.08%
8	Latvia	34,287	28,379	+20.8%	5.72%	4.97%	+0.75%	71.32%	68.00%	+3.31%
6	Lithuania	26,611	37,289	-28.6%	4.44%	6.53%	-2.09%	65.65%	74.95%	-9.31%
7	Estonia	19,780	21,420	-7.7%	3.30%	3.75%	-0.45%	59.33%	54.36%	+4.97%
9	Germany	16,421	17,329	-5.2%	2.74%	3.03%	-0.30%	28.77%	28.58%	+0.18%
		599,579	571,147	+5.0%						

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

Tab. 2. BSR's ports that handled over 1.0mt of bulk cargo in 2022 – total, liquid, and dry (thousand tonnes)

№	Country	Port	Total bulk			Liquid bulk				Dry bulk			
			2022	2021	yoy	2022	2021	yoy	Share of the port's total bulk 2022	2022	2021	yoy	Share of the port's total bulk 2022
1	RU	Ust-Luga	121,000	112,059	+8.0%	67,000	56,074	+19.5%	55.37%	54,000	55,985	-3.5%	44.63%
2	RU	Primorsk	57,100	52,999	+7.7%	57,100	52,999	+7.7%	100%	–	–	–	–
3	PL	Gdańsk	46,423	29,202	+59.0%	25,400	18,577	+36.7%	54.71%	21,023	10,625	+97.9%	45.29%
4	FI	Sköldvik	23,865	19,250	+24.0%	23,367	18,847	+24.0%	97.91%	498	403	+23.6%	2.09%
5	SE	Gothenburg	22,450	19,484	+15.2%	22,130	19,236	+15.0%	98.57%	320	248	+29.0%	1.43%
6	PL	Szczecin-Świnoujście	21,872	17,874	+22.4%	10,540	8,034	+31.2%	48.19%	11,332	9,840	+15.2%	51.81%
7	RU	St. Petersburg	19,000	20,729	-8.3%	11,000	11,487	-4.2%	57.89%	8,000	9,242	-13.4%	42.11%
8	LT	Klaipėda	18,414	29,298	-37.1%	8,291	6,820	+21.6%	45.03%	10,123	22,478	-55.0%	54.97%
9	SE	Brofjorden	17,446	19,277	-9.5%	17,446	19,277	-9.5%	100%	–	–	–	–
10	RU	Vysotsk	16,000	16,862	-5.1%	12,000	12,558	-4.4%	75.00%	4,000	4,304	-7.1%	25.00%
		Top 10	363,570	337,034	+7.9%								
11	LV	Riga	15,972	13,726	+16.4%	1,468	2,269	-35.3%	9.19%	14,504	11,457	+26.6%	90.81%
12	LV	Ventspils	11,914	8,440	+41.2%	6,771	5,992	+13.0%	56.83%	5,143	2,448	+110%	43.17%
13	PL	Gdynia	11,515	10,599	+8.6%	2,770	3,212	-13.8%	24.06%	8,745	7,387	+18.4%	75.94%
14	DE	Rostock	10,009	10,998	-9.0%	3,020	3,210	-5.9%	30.17%	6,989	7,788	-10.3%	69.83%
15	LT	Būtingė	8,197	7,991	+2.6%	8,197	7,991	+2.6%	100%	–	–	–	–
16	EE	Sillamäe	8,176	7,683	+6.4%	5,620	5,443	+3.3%	68.74%	2,556	2,240	+14.1%	31.26%
17	EE	Tallinn	8,119	10,684	-24.0%	5,158	7,180	-28.2%	63.53%	2,961	3,504	-15.5%	36.47%
18	SE	Luleå	7,645	7,463	+2.4%	248	218	+13.8%	3.24%	7,397	7,245	+2.1%	96.76%
19	DK	Statoil-havnen	6,910	7,563	-8.6%	6,910	7,563	-8.6%	100%	–	–	–	–
20	DK-SE	Copenhagen-Malmö (CMP)	6,520	6,490	+0.5%	3,167	2,808	+12.8%	48.57%	3,353	3,682	-8.9%	51.43%
21	DK	ADP (Fredericia-Nyborg-Middelfart)	6,047	5,416	+11.7%	4,597	4,257	+8.0%	76.02%	1,450	1,159	+25.1%	23.98%
22	FI	HaminaKotka	6,045	5,384	+12.3%	2,990	2,623	+14.0%	49.46%	3,055	2,761	+10.6%	50.54%
23	RU	Kaliningrad	6,000	6,093	-1.5%	1,500	1,474	+1.8%	25.00%	4,500	4,619	-2.6%	75.00%
24	LV	Liepāja	5,429	5,270	+3.0%	318	546	-41.8%	5.86%	5,111	4,724	+8.2%	94.14%
25	FI	Raahe	5,393	4,914	+9.7%	–	–	–	–	5,393	4,914	+9.7%	100%
26	DK	Aarhus	4,769	4,245	+12.3%	1,472	1,333	+10.4%	30.87%	3,297	2,912	+13.2%	69.13%
27	FI	Pori	4,596	3,216	+42.9%	1,139	1,352	-15.8%	24.78%	3,457	1,864	+85.5%	75.22%
28	FI	Kokkola	4,346	5,944	-26.9%	529	538	-1.7%	12.17%	3,817	5,406	-29.4%	87.83%
29	SE	Oxelösund	3,882	3,373	+15.1%	188	737	-74.5%	4.84%	3,694	2,636	+40.1%	95.16%
30	SE	Slite	3,624	3,072	+18.0%	–	–	–	–	3,624	3,072	+18.0%	100%
31	DK	Odense	2,920	1,766	+65.3%	210	15	+1300%	7.19%	2,710	1,751	+54.8%	92.81%
32	SE	Stenungsund	2,827	2,980	-5.1%	2,827	2,980	-5.1%	100%	–	–	–	–
33	SE	Nynäshamn Oljehamn	2,300	2,300	+/-0%	2,300	2,300	+/-0%	100%	–	–	–	–
34	SE	Karlshamn	2,264	2,454	-7.7%	1,691	1,706	-0.9%	74.69%	573	748	-23.4%	25.31%
35	DK	Aalborg	2,136	2,192	-2.6%	756	844	-10.4%	35.39%	1,380	1,348	+2.4%	64.61%

№	Country	Port	Total bulk			Liquid bulk				Dry bulk			
			2022	2021	yoy	2022	2021	yoy	Share of the port's total bulk 2022	2022	2021	yoy	Share of the port's total bulk 2022
36	FI	Naantali	2,134	2,466	-13.5%	1,471	1,889	-22.1%	68.93%	663	577	+14.9%	31.07%
37	DK	Stigsnæs	2,048	2,186	-6.3%	2,048	2,186	-6.3%	100%	-	-	-	-
38	SE	Mälärhamnar	2,046	1,950	+4.9%	734	783	-6.3%	35.87%	1,312	1,167	+12.4%	64.13%
39	DK	Esbjerg	2,037	1,692	+20.4%	447	449	-0.4%	21.94%	1,590	1,243	+27.9%	78.06%
40	SE	Norrköping	2,021	2,054	-1.6%	1,136	1,186	-4.2%	56.21%	885	868	+2.0%	43.79%
41	SE	Gävle	2,004	2,248	-10.9%	1,119	1,383	-19.1%	55.84%	885	865	+2.3%	44.16%
42	FI	Inkoo	1,871	2,061	-9.2%	424	516	-17.8%	22.66%	1,447	1,545	-6.3%	77.34%
43	DK	Aalborg Portland	1,663	2,118	-21.5%	-	-	-	-	1,663	2,118	-21.5%	100%
44	DK	Ensted	1,650	699	+136%	1,650	699	+136%	100%	-	-	-	-
45	DK	Aabenraa	1,648	1,868	-11.8%	78	169	-53.8%	4.73%	1,570	1,699	-7.6%	95.27%
46	FI	Uusikaupunki	1,623	1,852	-12.4%	370	265	+39.6%	22.80%	1,253	1,587	-21.0%	77.20%
47	SE	Skellefteå	1,613	1,654	-2.5%	659	698	-5.6%	40.86%	954	956	-0.2%	59.14%
48	FI	Tornio	1,612	1,855	-13.1%	171	140	+22.1%	10.61%	1,441	1,715	-16.0%	89.39%
49	FI	Helsinki	1,562	1,376	+13.5%	47	38	+23.7%	3.01%	1,515	1,338	+13.2%	96.99%
50	DK	Thyborøn	1,449	1,418	+2.2%	61	88	-30.7%	4.21%	1,388	1,330	+4.4%	95.79%
51	DE	Lübeck-Travemünde	1,336	1,204	+11.0%	20	-	-	1.50%	1,316	1,204	+9.3%	98.50%
52	SE	Storugns	1,325	1,147	+15.5%	11	9.0	+22.2%	0.83%	1,314	1,138	+15.5%	99.17%
53	DK	Asnæsverket	1,315	1,799	-26.9%	1,143	1,671	-31.6%	86.92%	172	128	+34.4%	13.08%
54	SE	Vänerhamn	1,278	1,147	+11.4%	140	147	-4.8%	10.95%	1,138	1,000	+13.8%	89.05%
55	DK	Randers	1,263	1,409	-10.4%	-	4.0	-100%	-	1,263	1,405	-10.1%	100%
56	DE	Wismar	1,236	1,574	-21.5%	4.0	-	-	0.32%	1,232	1,574	-21.7%	99.68%
57	DK	Køge	1,232	930	+32.5%	33	43	-23.3%	2.68%	1,199	887	+35.2%	97.32%
58	DK	Vordingborg	1,225	1,012	+21.0%	-	-	-	-	1,225	1,012	+21.0%	100%
59	DK	Avedøreværket	1,224	1,446	-15.4%	8.0	-	-	0.65%	1,216	1,446	-15.9%	99.35%
60	PL	Police	1,212	1,357	-10.7%	112	66	+69.7%	9.24%	1,100	1,291	-14.8%	90.76%
61	DE	Sassnitz (Mukran)	1,211	740	+63.6%	-	-	-	-	1,211	740	+63.6%	100%
62	DK	Kolding	1,126	988	+14.0%	40	43	-7.0%	3.55%	1,086	945	+14.9%	96.45%
63	SE-FI	Kvarken Ports (Umeå-Vaasa)	1,108	799	+38.7%	656	529	+24.0%	59.21%	452	270	+67.4%	40.79%
64	SE	Halland	1,053	990	+6.4%	395	398	-0.8%	37.51%	658	592	+11.1%	62.49%
65	DK	Lolland Havne	1,007	678	+48.5%	16	11	+45.5%	1.59%	991	667	+48.6%	98.41%
66	FI	Oulu	997	1,180	-15.5%	715	770	-7.1%	71.72%	282	410	-31.2%	28.28%

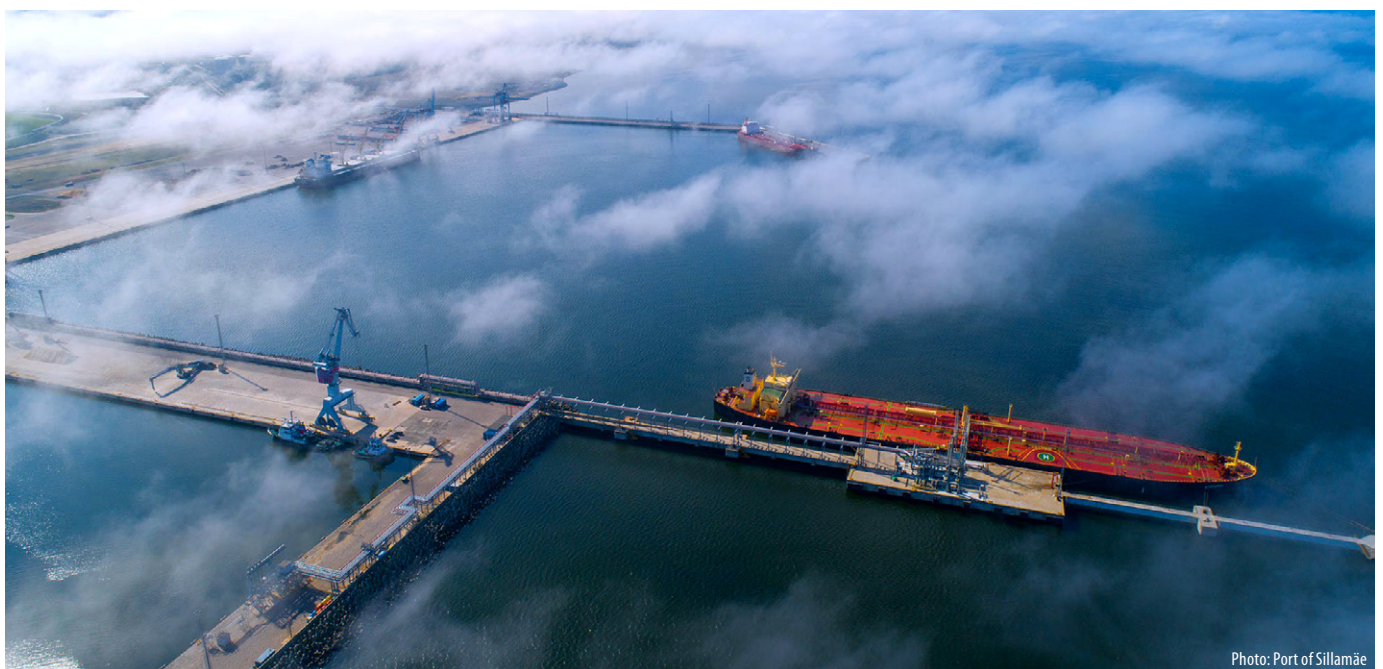


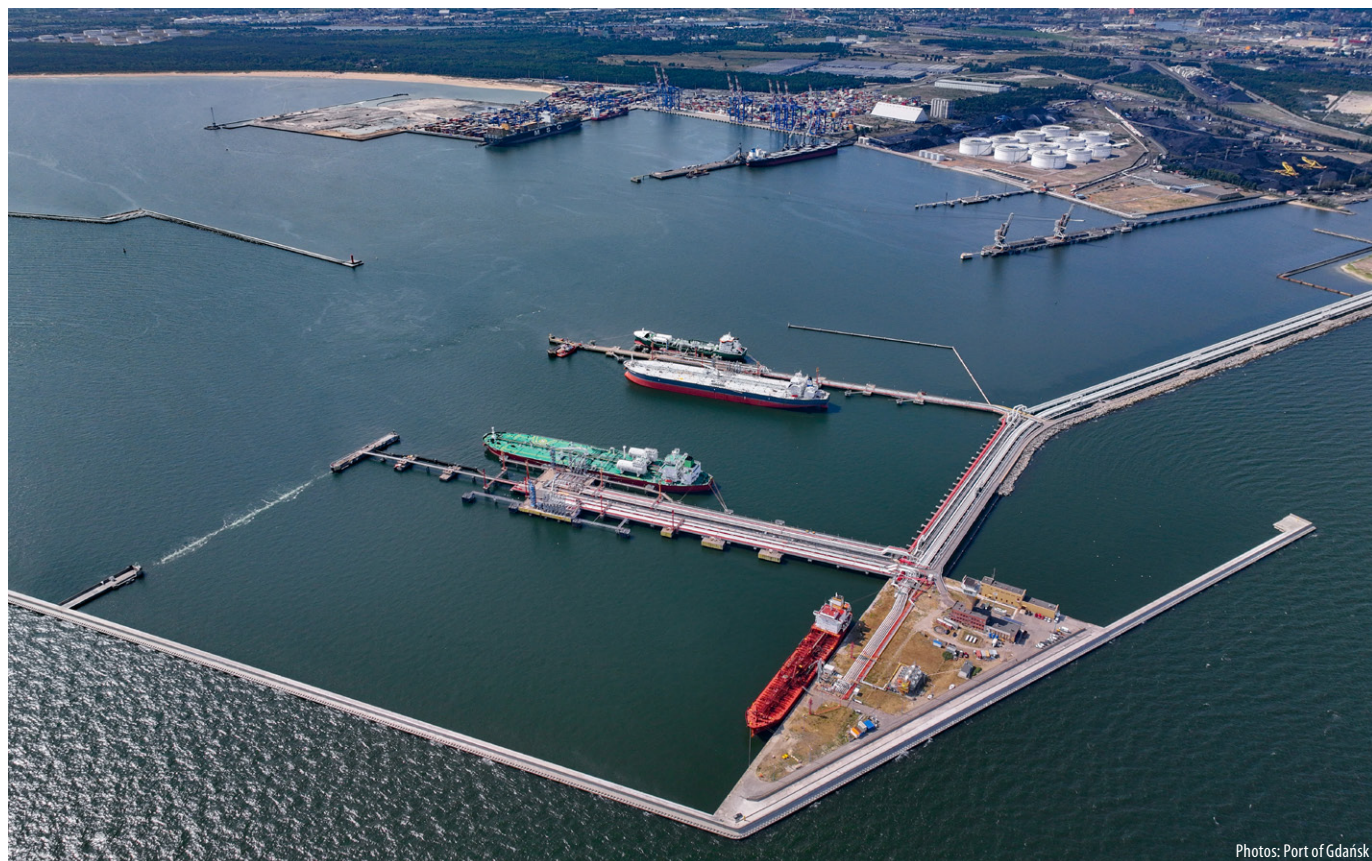
Photo: Port of Sillamäe

Tab. 3. BSR's ports' liquid bulk turnover in 2021-2022 (thousand tonnes)

Nº	Country	2022	2021	yoy	Share 2022	Share 2021	Share 2022-2021
1	Russia	148,600	134,608	+10.4%	44.01%	42.99%	+1.02pp
2	Sweden	54,740	56,968	-3.9%	16.21%	18.20%	-1.98pp
3	Poland	38,825	29,890	+29.9%	11.50%	9.55%	+1.95pp
4	Finland	32,300	28,000	+15.4%	9.57%	8.94%	+0.62pp
5	Denmark	23,414	22,985	+1.9%	6.94%	7.34%	-0.41pp
6	Lithuania	16,487	14,811	+11.3%	4.88%	4.73%	+0.15pp
7	Estonia	11,610	13,770	-15.7%	3.44%	4.40%	-0.96pp
8	Latvia	8,577	8,824	-2.8%	2.54%	2.82%	-0.28pp
9	Germany	3,063	3,224	-5.0%	0.91%	1.03%	-0.12pp
Total		337,616	313,080	+7.8%			
Liquid's share of total Baltic		36.88%	34.29%	+7.5pp			

Tab. 4. BSR's Top 10 liquid bulk ports in 2022 (thousand tonnes)

Nº	Country	Port	2022	2021	yoy	Share 2022	Share 2021	Share 2022-2021
1	RU	Ust-Luga	67,000	56,074	+19.5%	26.35%	25.04%	+1.31pp
2	RU	Primorsk	57,100	52,999	+7.7%	22.46%	23.67%	-1.21pp
3	PL	Gdańsk	25,400	18,577	+36.7%	9.99%	8.30%	+1.69pp
4	FI	Sköldvik	23,367	18,847	+24.0%	9.19%	8.42%	+0.77pp
5	SE	Gothenburg	22,130	19,236	+15.0%	8.70%	8.59%	+0.11pp
6	SE	Brofjorden	17,446	19,277	-9.5%	6.86%	8.61%	-1.75pp
7	RU	Vysotsk	12,000	12,558	-4.4%	4.72%	5.61%	-0.89pp
8	RU	St. Petersburg	11,000	11,487	-4.2%	4.33%	5.13%	-0.80pp
9	PL	Szczecin-Świnoujście	10,540	8,034	+31.2%	4.15%	3.59%	+0.56pp
10	LT	Klaipėda	8,291	6,820	+21.6%	3.26%	3.05%	+0.21pp
Top 10			254,274	223,909	+13.6%			
Total liquid bulk			337,616	313,080	+7.8%			
Top 10's share			75.31%	71.52%	+3.80pp			



Photos: Port of Gdańsk

Tab. 5. BSR's ports' dry bulk turnover in 2021-2022 (thousand tonnes)

Nº	Country	2022	2021	yoy	Share 2022	Share 2021	Share 2022-2021
1	Russia	70,500	75,122	-6.2%	26.91%	29.11%	-2.20pp
2	Poland	41,694	28,526	+46.2%	15.92%	11.05%	+4.86pp
3	Denmark	32,900	31,550	+4.3%	12.56%	12.23%	+0.33pp
4	Sweden	29,907	27,561	+8.5%	11.42%	10.68%	+0.74pp
5	Finland	29,600	31,520	-6.1%	11.30%	12.21%	-0.91pp
6	Latvia	25,710	19,555	+31.5%	9.81%	7.58%	+2.24pp
7	Germany	13,358	14,105	-5.3%	5.10%	5.47%	-0.37pp
8	Lithuania	10,124	22,478	-55.0%	3.86%	8.71%	-4.85pp
9	Estonia	8,170	7,650	+6.8%	3.12%	2.96%	+0.15pp
Total		261,963	258,067	+1.5%			
Dry bulk's share of total		28.61%	28.27%	+1.2pp			

Tab. 6. BSR's Top 10 dry bulk ports in 2022 (thousand tonnes)

Nº	Country	Port	2022	2021	yoy	Share 2022	Share 2021	Share 2022-2021
1	RU	Ust-Luga	54,000	55,985	-3.5%	36.61%	38.10%	-1.49pp
2	PL	Gdańsk	21,023	10,625	+97.9%	14.25%	7.23%	+7.02pp
3	LV	Riga	14,504	11,457	+26.6%	9.83%	7.80%	+2.04pp
4	PL	Szczecin-Swinoujście	11,332	9,840	+15.2%	7.68%	6.70%	+0.99pp
5	LT	Klaipėda	10,123	22,478	-55.0%	6.86%	15.30%	-8.43pp
6	PL	Gdynia	8,745	7,387	+18.4%	5.93%	5.03%	+0.90pp
7	RU	St. Petersburg	8,000	9,242	-13.4%	5.42%	6.29%	-0.87pp
8	SE	Luleå	7,397	7,245	+2.1%	5.01%	4.93%	+0.08pp
9	DE	Rostock	6,989	7,788	-10.3%	4.74%	5.30%	-0.56pp
10	FI	Raahe	5,393	4,914	+9.7%	3.66%	3.34%	+0.31pp
Total			147,506	146,961	+0.4%			
Total dry bulk			261,963	258,067	+1.5%			
Top 10's share			56.31%	56.95%	-0.64pp			

