TransBaltic

Towards an integrated transport system in the Baltic Sea Region

memo on Baltic Seaports Outlook 2008

Project Part-financed by the European Union

Baltic Sea Region Programme 2007–2013

REGION SKÅNE

The Baltic Seaports Outlook 2008

- A joint venture of Gdynia Maritime Academy and Baltic Ports Organisation, commenced in 2007
- The 2008 edition to present and evaluate the current economic situation in the BSR countries, development of the Baltic seaborne trade, maritime transport and seaports sector (2007 census)
- Regarded a useful source of information for seaport authorities, terminal operators, shipowners, shippers and other stakeholders
- Succeeded by Baltic Container Outlook 2009

BSO 2008 – selected observations (1)

- Over 80% of world merchandise trade volume carried by sea, expected to double by 2031 (yearly growth of 3% in the last three decades); growing share of high-volume goods
- The Baltic Sea remains one of the busiest routes in the world with 16% of the global traffic and a strategic route for oil exports
- Diversified level of intra-Baltic trade relations (60% index of the total external trade for the Baltic States, but only 11% and 20% respectively for Germany and Russia)

BSO 2008 - selected observations (2)

- Dominant role of maritime transport in extra-BSR trade; carriage of liquid and dry bulk cargo constitutes 2/3 of the total cargo traffic, while ro-ro and container segments stand for 21%
- External maritime transport (to North Sea and other destinations) overweighs the intra-Baltic transport; in case of containers the ratio is 10:1, yet for ro-ro goods it is 1:4 (volumes)
- Increase of containers turnover by 18% in 2007 (1 M TEU per year)

BSO 2008 - selected observations (3)

- Gradual increase in the domination of the Russia trade; 2007 as the first year of Russian seaports domination in cargo turnover
- Port of Primorsk as a Baltic leader in both total turnover (¼ of the BSR volume) and absolute annual growth
- Russia has 25% of the total container traffic with St.Petersburg as the leading container port (1.7 M TEU)
- Lubeck, Trelleborg and Gothenburg as leading ro-ro ports with a strong positive trend

BSO 2008 - selected observations (4)

THE POST-SLOWDOWN IMPACT

- Development dynamics to vary, with much higher rate expected for big seaports along the southern and eastern Baltic Sea coast where the flows are already dense
- Ongoing concentration of container traffic and intermodal transport operations on some selected shipping routes – leading to a creation of 2-3 main container ports (hubs) in the BSR by 2013-15
- Overcapacities in some ports may occur (overinvestment + shrinking demand)

Thank you for your attention!

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