



**Report**  
Polish ports in 2022  
Summary and future outlook

February 2024

**port**   
monitor

## Summary

- Record throughput result in Polish ports in 2023. The seaports in Gdańsk, Gdynia and Szczecin-Świnoujście handled a total of over 145 million tonnes of cargo, which is an increase of 9.6% compared to 2022.
- Since the Russian aggression against Ukraine in February 2022, Polish port market has been dealing with changes in the cargo structure. The crisis on the energy raw materials market has resulted in an increase in bulk cargo turnover, which currently accounts for over 60% of cargo in Polish ports.
- In 2023, the role of bulk cargo in Polish ports was strengthened by increased throughput of grain and liquid fuels. Increase in turnover of grains was, among others, the result of re-export of Ukrainian cereals and export of Polish grain remaining in the warehouses for months.
- Drops were recorded in unitized general cargo, both in ro-ro and container handling. Such results are primarily due to the economic slowdown – a high inflation, real incomes fall, and uncertainty related to the Russian invasion of Ukraine.
- In the ro-ro cargo segment, the only seaport that recorded an increase in throughput in 2023 is the Port of Gdynia (+2.1% y/y).
- The container turnover decreased for the second year in a row (-2.3%; -70,148 TEU). The largest container terminal, located in the Port of Gdansk, met with a reduction of the yearly result of only 1%. More severe declines were recorded in the Port of Gdynia (-4.44%) and in the Ports of Szczecin-Świnoujście (-10.33%).
- The past year brought a slight decline in passenger service in regular ferry traffic. In 2023, all Polish ports served 1.85 million passengers (-0.77%).
- In 2023, Polish ports have noticed a reduced number of cruise ship calls - a drop from 122 calls in 2022 to 79 calls in total last year. This change was caused mainly by fewer calls to the Port of Gdańsk.

## Operational results of the Polish seaports in 2022

In 2023, Polish ports recorded a total of 145.7 million tonnes of cargo, which means an increase of 9.56% compared to 2022 (Table 1). An increase in cargo handling was noticed in the Port of Gdańsk (+18.67%) and the Port of Gdynia (+5.25%), while the Ports of Szczecin-Świnoujście recorded a 4% decrease.

**Table 1. Turnover in the biggest Polish seaports in years 2018-2023 [thousands of tonnes]**

	2018	2019	2020	2021	2022	2023	Change 2023/22
<b>Port of Gdańsk</b>	49 032	52 154	48 038	53 213	68 220	80 957	<b>18,67%</b>
<b>Port of Gdynia</b>	23 492	23 957	24 662	26 692	28 197	29 399	<b>5,25%</b>
<b>Port of Szczecin-Świnoujście</b>	28 314	32 175	31 178	33 220	36 810	35 323	<b>-4,04%</b>
<b>Total</b>	<b>100 838</b>	<b>108 286</b>	<b>103 878</b>	<b>113 125</b>	<b>133 227</b>	<b>145 678</b>	<b>9,56%</b>

The Port of Gdansk, with the result of over 80 million tonnes, maintained the second position in the Baltic Sea, overtaking the Russian Port of Primorsk by 17.6 million tonnes. Another record year for the biggest Polish port is mainly caused by increased throughput of liquid fuels (+47.5%, +12.13 million tonnes) and grains (+60%, +1.16 million tonnes). Moreover, the high level turnover in coal and coke group was also maintained (+1.1%).

In 2023, in Szczecin-Świnoujście Ports, total throughput decreased by 4.04% and reached the level of 35.3 million tonnes. The volume reduction was mostly a consequence of drops in turnover of the general cargo segment (-10.4%, -1.84 million tonnes) and coal (-31.9%, -1.37 million tonnes). The largest increases, similar to the Port of Gdansk, were recorded in grain handling (+59.5%, +0.98 million tonnes).

In 2023, the Port of Gdynia recorded a slightly over 5% increase in total throughput. The main cargo groups that contributed to the result were much higher volumes of grain (+42.7%, +2.02 million tonnes) and liquid fuels (+57.3%, +1.29 million tonnes). The decline in turnover was noticed in all other cargo groups, except the ore category. However, the Port of Gdynia is not a port handling large amounts of this cargo and in 2023 the ore handling amounted to only 7.9 thou. tonnes.

In all major Polish ports, the largest increases involved two cargo groups: liquid fuels and grains. Each of the analyzed ports recorded a particular year-to-year increase in those segments, which resulted in a total increase in the throughput of liquid fuels by 41.1% (+14.5 million tonnes) and cereals by 50% (+4.16 million tonnes).

The significant shoot-up in the liquid fuel group is the result of the maintained supplies diversification policy, as well as the effect of the Russia's attack on Ukraine and increasing oil imports from directions other than Russia. From December 5, 2022, Russian crude oil cannot be imported by sea to the European Union and the Great Britain, while the ban on the import of Russian petroleum products, including fuels, entered into force on February 5, 2023. The ban on purchasing oil from Russia meant the need to increase supplies from other countries, mainly from distant overseas directions, which resulted in increased port turnovers. The intensification of the conflict in Israel may have also impacted those increases.

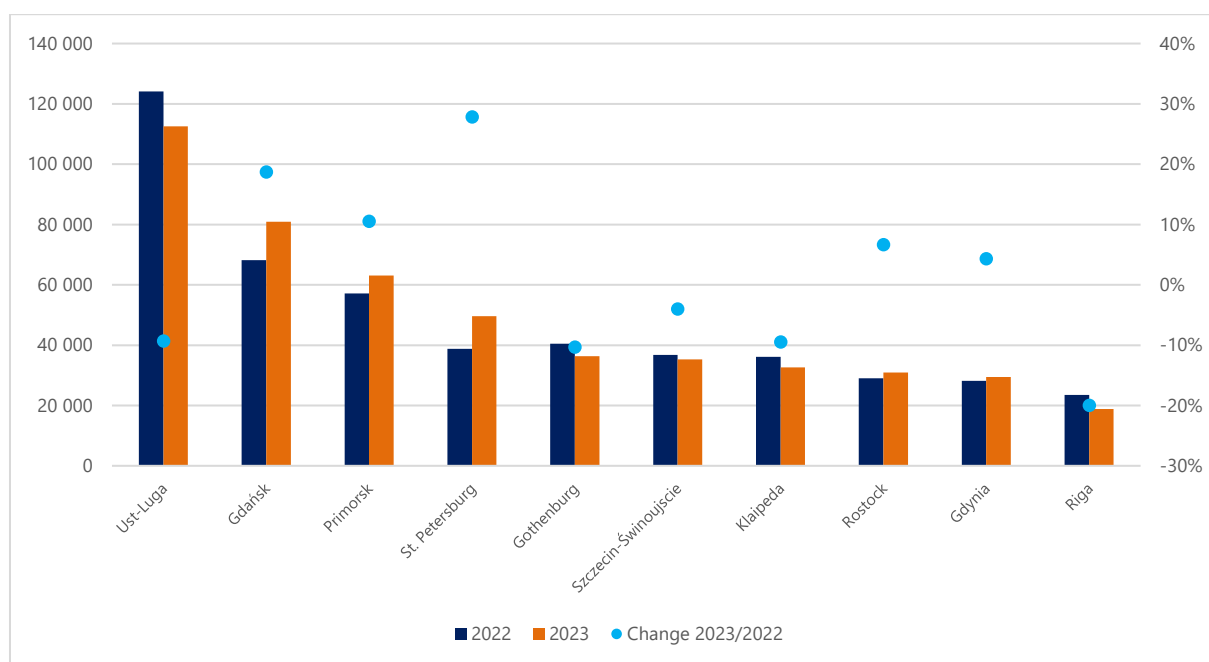


Figure 1. The cargo volumes in the largest ports in the Baltic Sea in 2022 and 2023 (thousands of tonnes).

Table 2. Handling structure in ports of Gdansk, Gdynia and Szczecin-Swinoujście in 2023 (thousands of tonnes).

Cargo group	Port of Gdansk		Port of Gdynia		Port of Szczecin-Swinoujście		Total	
	2023	Change 2023/2022	2023	Change 2023/2022	2023	Change 2023/2022	2023	Change 2023/2022
Coal and coke	13 360,9	1,1%	2 825,4	-17,0%	2 937,6	-31,9%	19 123,85	-8,6%
Ore	263,5	-48,9%	7,9	31,7%	1 135,6	-46,1%	1 406,96	-46,5%
Other bulk	3 519,7	-0,9%	1 024,5	-29,4%	3 991,4	20,6%	8 535,56	2,7%
Grain	3 091,9	60,0%	6 759,7	42,7%	2 631,8	59,5%	12 483,44	50,1%
Timber	156,6	-71,4%	178,3	-66,6%	182,2	-20,4%	517,07	-60,6%
General cargo	22 917,8	-0,1%	15 062,1	-3,1%	15 883,8	-10,4%	53 863,69	-4,2%
Fuels	37 646,4	47,5%	3 541,1	57,3%	8 560,3	14,4%	49 747,82	41,1%
<b>Total</b>	<b>80 956,7</b>	<b>18,7%</b>	<b>29 399,0</b>	<b>5,3%</b>	<b>35 322,7</b>	<b>-4,0%</b>	<b>145 678,40</b>	<b>9,6%</b>

In 2023 Naftoport in Port of Gdańsk reloaded 36.56 million tonnes of crude oil and other fuels from a total of 471 tankers, which is an increase of almost 50% y/y. This terminal is a place of import not only for the Polish market but also for Germany. Polish terminal is important e.g. for the refinery in Leuna, especially after the introduction of the EU embargo on crude oil from Russia.

The increase in the group of liquid fuels in the Szczecin-Świnoujście Ports concerned both LNG (+7.1%) and other liquid fuels (+25.1%). Last year, the port received 62 deliveries of liquefied natural gas, with a total volume of 4.66 million tonnes, which constitutes approximately 55% of the fuels handled at the Szczecin-Świnoujście Ports. Most of the LNG carriers came from the United States (41 units) and Qatar (19 units).

In 2023, the throughput of liquid fuels at the Port of Gdynia increased compared to 2022 (2.25 million tonnes) and the record result from 2021 (2.5 million tonnes). Total volume has increased to 3.5 million tonnes, which means a change of almost 60% y/y.

Last year, the analyzed ports recorded a very high increase in grain turnover. In the case of the Port of Gdańsk and the Ports of Szczecin-Świnoujście, the change compared to the previous year was +60%. In terms of tonnage, the main grain port - the Port of Gdynia - recorded an increase by as much as 2 million tonnes (+43% y/y). Grain throughput has increased significantly already in 2022 in all Polish seaports. This was directly related to the blockade of Ukrainian ports on the Black Sea and the export of some Ukrainian grain through Polish ports. In 2023, we were faced with a rather difficult situation on the grain market in Poland due to very large grain surpluses, which resulted from the import of grain from Ukraine on an unprecedented scale and high harvests in Poland. In 2022, large volumes of grain, which were originally supposed to pass through Poland only in transit, ultimately stayed in the country. This situation left Poland with very large grain stocks. This contributed to the fact that in 2023, the export of grain remaining in Polish warehouses became a priority, resulting in increased shipments to overseas countries.

The increased volume in 2023 also can be identified in the "other bulk" cargo group (+2.7% y/y). The highest year-on-year growth was recorded by the Ports of Szczecin-Świnoujście, where turnover increased by 20.6% y/y. However, at the Port of Gdynia, there was a significant weakening in this category compared to 2022 (-428.9 thousand tonnes, -29.6% y/y). At the Port of Gdańsk, turnover in this segment decreased by only 0.9%.

After the records achieved in coal in 2022, the cargo handling of this group decreased slightly last year. Last year, Polish ports noticed a total turnover of 19.1 million tonnes of coal (-8.6% y/y). However, the decline was caused by a significant reduction in coal throughput in the last quarter of 2023. The first three quarters of 2023 showed an increasing tendency, while the last quarter brought a 65,8% plunge in coal handling, compared to the same period of 2022.

In the general cargo handling, a decrease was recorded in all analyzed ports (-2.35 million tonnes). Both in tonnage and percentage terms, the most severe change took place in the Port of Szczecin-Świnoujście (-10.4% y/y, -1.84 million tonnes). In 2023, Polish ports handled a total of 53.8 million tonnes of general cargo, which was 4.2% lower than the 2022 result. The general cargo group is dominated by unitized cargo (containers and ro-ro/ferry cargo), therefore, this segment is strongly influenced by the economic situation. The year 2023 was a time of a significant economic slowdown due to high inflation, real income fall, and uncertainty related to the Russian invasion of Ukraine which affected the level of demand for consumer goods. It resulted in a reduction in the turnover of unitized general cargo.

Declines also concerned such categories as "ore" (-60.6%) and "wood" (-46.5%). It is worth pointing out that in 2022 the wood cargo turnovers were exceptionally high, which was related to the handling of wood from Lithuania, Latvia, Estonia, and Scandinavia. Wood from these directions arrived in Polish ports, and then most of it was loaded into containers and transported to container terminals, from where the raw material was exported to China. The volume handled in 2023 is similar to the one in 2021, which means a return to pre-boom results in 2022. In turn, the decrease in "ore" segment could be related to the decline in steel production in Poland in 2023.

Over the last year, some changes in the share of individual cargo groups in total turnover in Polish ports

could be seen. The share of liquid fuels increased by 7.6 p.p. (to 34.1%), the share of cereals increased by 2.3 p.p. (to 8.6%), whilst the shares of general cargo and coal decreased by 5.3 p.p. and by 2.6 p.p., respectively.

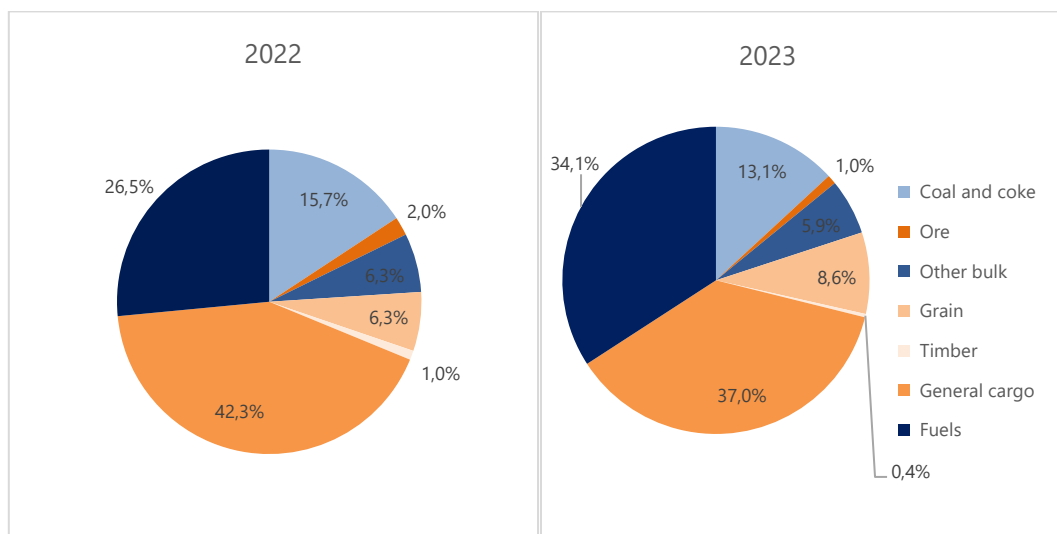


Figure 2. The structure of cargo handled in the main ports in Poland in 2022 and 2023.

## Containers

Last year, all Polish ports handled slightly less than 3.0 million TEU (-2.3% than in 2022). All of the seaports have noticed a decrease in container turnover, which was mainly due to the weakening of the Polish economy.

The Port of Gdańsk noticed a drop in results and handled 2 050 287 TEU. However, the port kept its first position among the largest container seaports in the Baltic Sea Region. Its decline of approximately 1% was also the smallest change among all Polish container ports. This result was achieved mainly thanks to the significant revival of container turnover at the Baltic Hub terminal in the last quarter of 2023 when container handling increased by approximately 20% compared to the last quarter of 2022. In 2023 Baltic Hub was struggling with high congestion both on land and water.

A decline was also recorded in Gdynia (-4.44% y/y, -40.5 thou. TEU), and Szczecin-Świnoujście seaports (-10.33% y/y, -7.8 thou. TEU). Port of Gdynia's decline in turnover, apart from the condition of the Polish economy, was also influenced by the CMA CGM decision to move its services to Gdańsk in May 2023.

Table 3. Container handling in the biggest Polish seaports in years 2018-2023 (TEU).

	2018	2019	2020	2021	2022	2023	Change 2023/22
<b>Port of Gdańsk</b>	1 948 974	2 073 215	1 923 785	2 117 829	2 072 122	2 050 287	-1,05%
<b>Port of Gdynia</b>	803 871	896 968	905 121	985 950	914 448	873 892	-4,44%
<b>Port of Szczecin-Świnoujście</b>	81 451	76 143	86 816	82 140	75 381	67 592	-10,33%
<b>Total</b>	<b>2 834 296</b>	<b>3 046 326</b>	<b>2 915 722</b>	<b>3 185 919</b>	<b>3 061 951</b>	<b>2 991 771</b>	<b>-2,29%</b>

## Ro-ro ferry traffic

In the case of freight units, the only port that recorded an increase in turnover last year is the Port of Gdynia (+2.07% y/y). This result is due to the high cargo volumes on the Gdynia-Karlskrona ferry line operated by Stane Line, while transport on the Gdynia-Hanko ro-ro line operated by Finnlines decreased. The decline in cargo handling in freight units recorded by the Port of Gdańsk was as much as -25.67% y/y, and in the Port of Szczecin-Świnoujście -10.91% y/y. The last mentioned port also recorded a decline in passenger car service, while the Port of Gdańsk and Port of Gdynia recorded an increase of 7.5% and 8.4%, respectively.

**Table 4. Ro-ro freight units and passenger cars served in biggest Polish sea ports in years 2022 and 2023 [pcs].**

	Passenger cars			Freight units		
	2022	2023	Change 2023/2022	2022	2023	Change 2023/2022
<b>Port of Gdańsk</b>	101 899*	109 582*	7,54%	33 036	24 556	-25,67%
<b>Port of Gdynia</b>	106 753	115 747	8,43%	318 050	324 626	2,07%
<b>Port of Szczecin-Świnoujście</b>	270 969	262 156	-3,25%	515 688	459 440	-10,91%
<b>Total</b>	<b>479 621</b>	<b>487 485</b>	<b>1,64%</b>	<b>866 774</b>	<b>808 622</b>	<b>-6,71%</b>

\*both private passenger cars in ferry traffic and cars in trade exchange in other traffic than ferry

## Passenger traffic

Last year, the increase in the number of passengers concerned only the Port of Gdynia, which recorded an increase of almost 11%. The new ferry serving the Gdynia-Karlskrona line, Stena Estelle, has already increased the attractiveness of the connection at the end of 2022. From January 2023, it is accompanied on the route by its sister vessel - Stena Ebba. In Świnoujście and Gdańsk, declines in ferry passenger service were recorded. In Świnoujście it was a result of a decrease in freight unit turnover as the dominant group of passengers on ferry lines from Świnoujście are truck drivers. At the end of 2023, after 35 years of service, the Jan Śniadecki ferry operated by Unity Line ended its service on the Świnoujście-Ystad line. From 2024, the unit will be employed on Greek lines, belonging to the Ainaftis fleet, with a new name - Thalassitis.

**Table 5. Regular passenger traffic in major Polish ports in 2018-2023 [passengers].**

	2018	2019	2020	2021	2022	2023	Change 2023/2022
<b>Port of Gdańsk</b>	117 939	166 475	147 909	162 209	165 549	142 628	-13,85%
<b>Port of Gdynia</b>	687 545	682 590	394 608	453 017	600 029	665 610	10,93%
<b>Port of Szczecin-Świnoujście</b>	1 072 679	1 069 318	930 625	1 046 333	1 097 535	1 040 455	-5,20%
<b>Total</b>	<b>1 878 163</b>	<b>1 918 383</b>	<b>1 473 142</b>	<b>1 661 559</b>	<b>1 863 113</b>	<b>1 848 693</b>	<b>-0,77%</b>

## Cruise traffic

In 2023, there was, once again, an increase in the number of tourists served in Polish ports, but with a reduced number of ship calls. The largest Polish cruise port, the Port of Gdynia, handled 5 cruise vessels less than in 2022 while serving 57.45% more of passengers than in 2022. In the case of the Port of Gdańsk, there was a significant reduction in the number of cruise ship calls (by 46%), which contributed to a decline in the number of cruise passengers served by 44% y/y. Last year only one unit with 471 passengers on board called at the port of Szczecin.

The cruise ship season in the Baltic Sea has been fraught with problems since 2020. Firstly, most cruises were canceled due to pandemic restrictions, and then, secondly, the war in Ukraine forced immediate changes to routes to omit calls at St. Petersburg, which also resulted in the loss of ports near Russia, such as the Port of Helsinki and the Port of Tallinn.

**Table 6. Cruise traffic in Polish ports in 2022 and 2023 [passengers and calls number].**

	Tourists			Calls		
	2022	2023	Change 2023/2022	2022	2023	Change 2023/2022
<b>Port of Gdańsk</b>	29 251	16 381	-44,00%	79	42	-46,84%
<b>Port of Gdynia</b>	56 991	89 721	57,43%	41	36	-12,20%
<b>Port of Szczecin-Świnoujście</b>	997	471	-52,76%	2	1	-50,00%
<b>Total</b>	<b>87 239</b>	<b>106 573</b>	<b>22,16%</b>	<b>122</b>	<b>79</b>	<b>-35,25%</b>

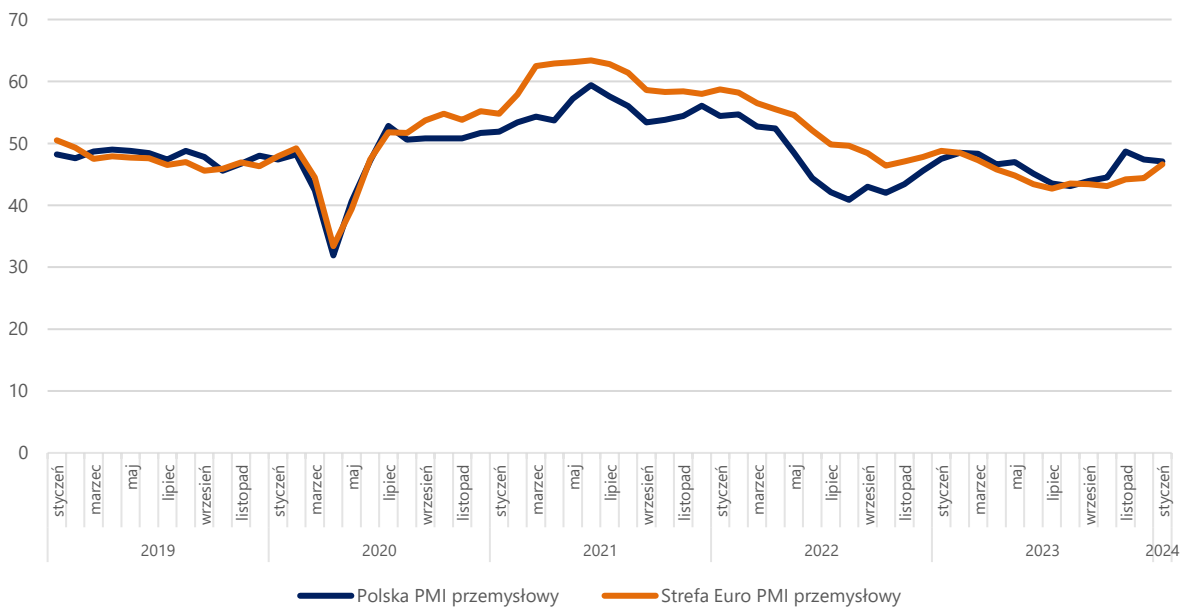
## Outlook for 2023

In order to determine the outlook for 2023, the PMI (Purchasing Managers' Index™)<sup>1</sup> indicator developed by IHS Markit can be helpful. The PMI is a survey-based indicator of economic activity, often considered as a leading indicator of economic activity. The original indicator is the manufacturing PMI, but now there is also a services indicator and a composite indicator (a weighted average of the manufacturing and service PMIs for given geographic region or economy). The PMI for industry may herald changes in trade, and changes in trade may affect the volumes of cargo handled at ports. The PMI level is made up of "sub-indices": production, new orders, employment, costs, selling prices, exports, purchasing activity, supplier efficiency, order backlog and inventory.

<sup>1</sup> The Purchasing Managers' Index™ (PMI™) is a survey-based indicator of economic activity that includes sub-indices of: Production, New Orders, Employment, Costs, Selling Prices, Exports, Purchasing Activity, Supplier Performance, Order Backlog and Inventory. In surveys, respondents are asked to report changes in each variable compared to the previous month, noting whether each variable increased/improved, decreased/worsened, or remained unchanged. These objective questions are accompanied by one subjective "sentiment" question, which is asking companies whether they forecast higher, same or lower production during the year. PMI is widely used to predict changing economic trends. The PMI is compiled globally by IHS Markit, although a small number of trade associations also compile local PMIs in certain markets, such as the ISM in the United States. The indicator was originally developed for manufacturing, but IHS Markit pioneered the extension to other sectors in the 1990s, including services, construction and retail.



The post-pandemic rebound came to an abrupt halt with the outbreak of war in Ukraine in 2022. The changes in the energy market resulted in a high inflation rate, which contributed to economic stagnation in Poland and in Europe. The PMI reading for Poland in January 2024 reached 47.1 points and remains below the neutral level of 50 points for the twenty-first month in a row.



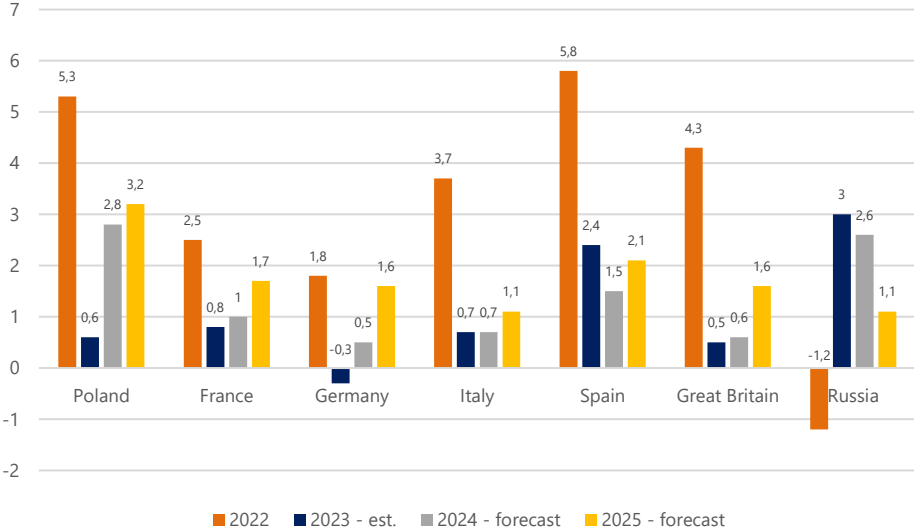
**Figure 3. Industrial PMI index in Poland and in the Eurozone in January 2019-January 2024**

Source: Actia Forum based on IHS Markit.

The decline in the number of new orders meant primarily low demand related to the weak German market, which is the main direction of Poland's exports, as well as strong competition from Asia, excessive inventories with customers, and the lack of new investments. The mood of entrepreneurs in Western Europe has improved. In January, the PMI index in the Eurozone increased from the December 44.4 points to 46.6, and in Germany from 43.3 to 45.4 points.

Poland's GDP growth is expected to increase from an estimated 0.6% in 2023 to 2.8% in 2024 and then to 3.2% in 2025. Looking closer at the GDP growth forecasts for 2024, it can be indicated that the forecasts from January 2024 were increased compared to what was indicated in October 2023, when the Polish GDP was expected to increase by 2.3% in 2024.

The year 2023 was marked by inflation, the continued war in Ukraine, and disruptions in the transport and energy markets caused by the intensification of the conflict in the Middle East. The year 2024 might be another year with an undoubted impact of geopolitical factors on the entire Polish economy, and thus on the transport market. Last year, weakening demand resulted in reduced volumes of containerized and ro-ro cargo. A slight recovery in consumer sentiment in the last months of 2023 and Poland's GDP growth forecast for 2024 give hope for a slight recovery in the unified general cargo segment in 2024. In turn, the prospect of the still unfinished war in Ukraine and the related embargo on raw materials (coal, crude oil, and their products, as well as full sanctions on LPG from December 20, 2024) will most likely result in a further increase in the bulk cargo handling in ports.



**Figure 4. GDP growth forecasts for 2024 and 2025 in selected Eurozone countries, Poland, Russia and the UK.**

Source: Actia Forum based on World Economic Outlook, January 2024.

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