13 Volume of port traffic

13.1 Number of incoming and outgoing passengers per port
13.2 Volume of cargo handled per port

Key messages

• All four of the biggest ports in the South East Baltic region (Gdansk, Gdynia, Klaipeda and Kaliningrad) show growth in both numbers of passengers and volume of cargo handled. However, significant differences persist in the pace of port development.

• The biggest passenger port in the South East Baltic Region is Gdynia with a throughput of 470 thousand passengers in 2007; the biggest cargo port is Klaipeda with over 28 million tonnes handled in 2007.

• Passenger traffic has increased overall since the turn of the twenty first century although this has been due almost entirely to flows which originate in, or are destined for, ports outside the South East Baltic region. Intra-South East Baltic traffic has virtually ceased.
• The strongest performing port in recent years in terms of cargo handled has been Marine Port Kaliningrad although volumes are small compared with Klaipeda and ports in Pomorskie.

• Each sub-region has ambitious port expansion plans which need to be tested rigorously against sustainability criteria.
Why monitor the volume of port traffic?

We want to build-up a picture of the relative importance of ports to the coastal economy in terms of the throughput of both passengers and cargo.

For many ports, passenger traffic is their lifeblood and the loss of a ferry service or the building of a cruise ship terminal can change their prospects dramatically, not least because of the knock-on effects in terms of local tourism, demand for port services and pressure for associated infrastructure, especially roads. The effect of changes in the amount of goods handled on local employment or the demand for port services is more difficult to ascertain because nowadays cargo is loaded and unloaded mechanically. Again, it is often hard to work out whether profits generated by port activities are recycled locally or repatriated elsewhere.

What is more certain is that an increasing throughput of goods year-on-year will lead to a demand for additional port infrastructure such as new docks, roads, sea defences, freight storage facilities, and so on, and that these will have varying degrees of benefit and disbenefit to the local and regional economy and environment.

Fig. 13.4: Volume of cargo handled in the South East Baltic
What does the indicator show?

Throughput of passenger traffic has increased substantially in the South East Baltic since the turn of the twenty first century. Klaipeda, for example, saw an increase of 55% in incoming and outgoing passengers between 2000 and 2006 from 107,000 to 239,000 although a significant proportion of this increase was due to cruise liners docking at a terminal opened in 2003. Exactly what contribution cruise passengers make to the local economy has yet to be calculated.

In Pomorskie Voivodeship, the biggest passenger ports are Gdynia (over 450,000 passengers each year) and Gdansk (nearly 200,000).

Passenger traffic in Kaliningrad Oblast is comparatively small. However, Kaliningrad-Pionerskiy is supposedly planning a cruise liner terminal to be built in the near future. There has been a recent increase of 11 percent in the number of passengers using ferries from Kaliningrad-Baltiysk to St. Petersburg and an even bigger increase – 37 percent – in the number travelling to and from Lübeck in Germany (fig. 13.5).

Where do the data come from?

Data were obtained from EUROSTAT, the Department of Statistics to the Government of the Republic of Lithuania; the Statistical Office in Gdansk and the Maritime Institute in Gdansk; and official reports of ROSSTAT (Russian federal statistics authority), especially Basic indices of development of cities and districts in Kaliningrad Oblast (1999-2005). Additional data was sourced from: www.portofklaipeda.lt; http://seanews.info/seanews; www.portgdansk.pl; and www.worldcargonews.com.
There used to be a fairly vibrant intra-regional market but this has almost disappeared over the past decade. Short cruises still ply from Gdansk to Kaliningrad-Baltiysk in search of tax-free alcohol and tobacco but the future of the trade depends on ongoing bilateral negotiations between the Polish and Russian authorities.

With regard to the amount of cargo handled, Gdynia (by 34%), Klaipeda (by 32%) and Gdansk (by 29%) have all expanded rapidly since 2000. The strongest performance, though, was that of Kaliningrad-Baltiysk which has grown by 70 percent since the turn of the century. However, volumes handled by the Russian port remain small at around 14,000 tonnes in 2006 (compared to Klaipeda which transshipped over 28 million tonnes in 2007 and overtook Gdansk to become the biggest port in the South East Baltic region).
What are the implications for coastal planning and management?

A recent forecast suggests that port activity in the Eastern Baltic will increase by at least a further third over current figures by 2020 but that expansion may not be uniform across the South East Baltic region. Of crucial importance will be investment in railway connections to the south and east. Klaipeda is well-placed in this regard: the port is linked already to Odessa on the Black Sea via Minsk and Kiev and will be the western terminus of the new Trans-Siberian Mainline to Vladivostok via Vilnius, Minsk, and Moscow. Gdansk is planning similarly: a new freight connection to Brno/Bratislava via Warsaw built within the framework of the EU Trans European Network should be operational by 2015. Gdynia and Gdansk derive a significant proportion of their income from handling Russian oil in transit to western Europe and hence a proposed pipeline by-passing the ports is a considerable threat. Not surprisingly, both ports are looking intently at alternative cargos – Gdynia has doubled its container-based general cargo trade to 460,000 20' equivalent of cargo in just five years.

EU policy is to revert by 2010 to the modal split in transport that prevailed in 1998. ‘Motorways of the Sea’ is the principle policy tool to bring this about. The Motorways are intended to concentrate freight flows on sea-based logistical routes with the objectives of reducing road congestion and/or improving access to peripheral and island regions and countries. Four motorways of the sea corridors, one of them for the Baltic Sea, have been designated so far. Research has identified a number of links with the greatest potential to take advantage of the Baltic Motorway. They include Gothenburg-Klaipeda, Karlshamm-Klaipeda and Karlskrona-Gdynia. In addition, Kaliningrad-Baltiysk has been nominated as one of only two ports (the other being St Petersburg) ideally placed to service the Motorway and provide transshipment facilities.
The well-being of the South East Baltic ports is essential not only for local economies but for the national economies as well. Klaipeda port, for example, provides 23,000 jobs and accounts for 4.5 percent of Lithuania’s GDP. A little less than one third of all goods traded internationally passes through the port. But fulfilling expansion plans can be realised only with massive investments in new infrastructure and inevitably some schemes will be in conflict with other land uses, not least areas designated for landscape and nature conservation. Solutions will have to be bold and innovative such as the massive artificial island at Klaipeda which will act as an ‘avant-port’ for the city. The new island will be about 1.8 km long and 0.6 km wide to accommodate the expected increase in traffic. Moreover, it will be a deep water port with 17.5 metres of water, allowing it to lodge larger vessels.

Port expansion and operational activities can co-exist happily with recreation and tourism (ports can become tourist attractions in their own right) and with priority habitats, landscapes and seascapes. The key to success is to prevent piecemeal, small-scale development and to draft a multifunctional strategy based on sound integrated coastal management principles including marine spatial planning in all three countries in the South East Baltic region.
What further work is needed?

The indicator is soundly based on readily available data. However, it does not tell us everything we want to know. Passenger statistics sometimes include cruise ship passengers and sometimes do not. Where they do, numbers by themselves do not demonstrate the impact of cruise tourism on the local economy. Similarly, the behaviour of ferry passengers will vary according to the type of trip they have taken and the reasons for it.

In terms of cargo handled, it would be useful to match future port expansion with both employment and environmental impact. And, although difficult, it would be useful to measure to what extent local communities benefit, if at all, from the sort of automated, capital intensive methods of transshipment increasingly being introduced to European ports.