Market Observation for Danube Navigation: Results for the Period January-June 2025

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1 General characteristics of the Danube shipping market in the first half of 2025

1.1 Initial state of the market in 2025

The initial state of the Danube shipping market in the first half of 2025 was determined by the overall results of 2024, market dynamics in the first Q_1 quarter of 2025, and forecasts for the first half of 2025. According to the EUROFER (European Steel Industry Trade Association) forecast (July 2025), no growth is expected in the metallurgical industry of the European Union and Eurozone countries, as well as in the Danube and adjacent basins (Rhine-Main-Danube system, Black Sea basin). At the same time, the USDA (United States Department of Agriculture) forecast (July 2025) points to an increase in key indicators in the agricultural sector and an increase in transport activity in the current marketing period.

The situation in Danube shipping, especially in the Lower Danube region, continued to deteriorate. The Russian Federation intensified its attacks on Ukraine's Danube infrastructure, and fragments of Russian unmanned aerial vehicles were also found on the territory of neighboring countries – Romania and the Republic of Moldova. The Danube transport market faced serious navigation safety issues, additional risks, and distortions in certain transport sectors, which in turn led to a partial reorientation of the market.

During the first half of 2025, starting in January (the first attack on the Izmail port region this year occurred in January) and almost every month, including July, Russia regularly carried out air strikes on Ukraine's Danube port infrastructure and adjacent facilities. As a result of the attacks, grain hangars, warehouses, and administrative buildings were destroyed in Ukrainian Danube ports and adjacent facilities, and vessels engaged in cargo operations were seriously damaged.

On 23 July 2025, a dredger performing maintenance work on the Kiliya Estuary Canal struck a mine, killing three crew members and injuring eight others.

Civilian targets were also struck, endangering the lives of the civilian population.

Significant damage was caused to the Lower Danube River ecosystem:

- air and soil pollution due to fires and the burning of oil products and grain;
- damage to water resources due to spills of sunflower oil and petroleum products;
- pollution of the Danube delta with fuel oil after the accident in the Black Sea involving the Russian tankers "Volgoneft-212" and "Volgoneft-239", which were not intended for maritime navigation, were over 50 years old, and were approved for operation by the former Russian River Register.

It should be noted that Russia's air attacks have created conditions that pose a direct threat to the security not only of Ukraine's Danube port infrastructure, but also of the entire shipping system on the Lower Danube, including the safety of crew and personnel.

Despite regular shelling, Ukrainian Danube ports continue to operate and make a significant contribution to global food security.

In 2025, under the current circumstances, the Danube Commission continued actively promoting the export of Ukrainian agricultural products and the import of goods vital to Ukraine. These activities were carried out as part of the *Danube Solidarity Lanes EU-Ukraine* initiative, adopted in May 2022 in support of the European Union's solidarity measures with Ukraine. The main objective of the initiative was to stabilize and develop freight transport logistics schemes using the Danube ports of Ukraine, the Republic of Moldova, and Romania, as well as the Danube-Black Sea canal connections.

The role and significance of the *Danube Solidarity Lanes EU-Ukraine* initiative have not diminished, despite the increased activity of the **Ukrainian Grain Corridor**, which was established in the fall of 2023, utilizing the ports of Odessa, Pivdennyi, and Chornomorsk (ports of Greater Odessa). At the same time, maintaining global food security still largely depends on supporting existing and creating new logistics schemes for the export of Ukrainian agricultural products based on the cluster of Ukrainian Danube ports. Accordingly, the main objective of the Danube Solidarity Lanes EU-Ukraine initiative is to ensure the sustainability and constant readiness of Danube shipping as a backup transport route to/from Ukraine's Danube ports.

1.2 Transport dynamics in the first quarter of 2025

1.2.1 Water flow and operating draught of vessels

The absence of river freezing and ice phenomena in the first quarter of 2025 ensured uninterrupted navigation.

During this period, water capacity remained relatively stable, allowing vessels to be loaded to a draught of 2.5-2.7 m when moving upstream and 2.2-2.3 m when moving downstream (based on the draught of vessels moving on the Middle Danube).

1.2.2 Market dynamics in the first quarter of 2025

The state of the Danube freight market in the first quarter Q_1 2025 was shaped by the main factors listed in Section 1 and the continuing negative impact of Russian aggression in Ukraine on key industries and the agricultural sector in the Danube and adjacent basins.

Given the relative stability of navigation conditions and the partial reorientation of the market, freight volumes in Q_1 2025, according to data from key control points, were as follows:

- cargo volumes through the Jochenstein lock (cross-border traffic between Germany and Austria) in Q_1 2025 amounted to 635.4 thousand tonnes, which was 72% of the volumes in Q_1 2024;
- cargo traffic volumes through the Gabcikovo lock (cross-border traffic between Hungary and Slovakia) in Q_1 2025 amounted to 1,034 thousand tonnes (80% of the volumes in Q_1 2024);
- The volume of cargo transported through the Mohács checkpoint (cross-border traffic between Hungary, Croatia, and Serbia) in Q_1 2025 amounted to 1,002 thousand tonnes, or 95% of the volume of cargo transported in Q_1 2024;
- Transport volumes via the Danube-Black Sea canal in Q_1 2025 amounted to 3,600 thousand tonnes (66% of the corresponding figure in Q_1 2024), of which:
  - international transport: 2,595 thousand tonnes, which is 59% of Q_1 2024;
  - domestic transport: 1,005 thousand tonnes, which is 98% of Q_1 2024.

Table 1.1. Cargo turnover of the Danube ports in the first quarters of 2023-2025 (thousand tonnes)

Country/year	2023 Q_1	2024 Q_1	2025 Q_1
Germany	453	1,276	542
Austria	1,232	1,391	1,339
Slovakia*	371	471	424
Hungary	840	1,122	980
Croatia**	80	90	51
Serbia**	3,426	3.295	3.043
Bulgaria	2,001	1,606	1,505
Romania	6,012	7,002	4,653
Republic of Moldova	610	699	621
Ukraine	6,806	5,653	2,311

* Ports of Bratislava and Komarno
**Numbers for Croatia and Serbia also include the countries' transport volumes on the Sava River

The cargo turnover of the Port of Constanţa by river vessels amounted to 3,244 thousand tonnes, or 60.3% of the cargo turnover in Q_1 2024; at the same time, 331 thousand tonnes were loaded from Romanian ports to Ukrainian Danube ports, and 105 thousand tonnes of cargo arriving from Ukrainian ports were unloaded.

Table 1.2. Cargo turnover of Ukrainian Danube (river+sea) ports in the first quarter of 2025 (thousand tonnes)

Period/port	Izmail	Reni	Ust-Dunaisk
2024	13,448	3,431	517
Q_1 2024	3,889	1,567	197
Q_1 2025	1,991	266	54

Table 1.3. Cargo turnover of Ukrainian Danube (river+sea) ports in export in the first quarter of 2025 (thousand tonnes)

Type of good/port	Izmail	Reni	Ust-Dunaisk
Grain	426 (1,798*)	48(562*)	0(0*)
Other bulk goods	222 (312*)	32 (273*)	6(40*)
Oil (bulk)	53 (287*)	10 (245*)	0(7)

*Indicators for the corresponding period of 2024 are given in bracket for comparison

1.2.3 Passenger transport

On the Upper Danube (Gabcikovo lock statistics), passenger transport on cruise vessels with cabins at the beginning of 2025 showed the following dynamics (Table 1.4):

Table 1.4. Passenger transport at Gabcikovo lock

Month/measure	Number of vessel passages (total)	Number of passengers (thousands)
January	51 (35*)	5 (3*)
February	10 (4*)	1 (0.1*)
March	167 (109*)	18 (13*)

* Indicators for the corresponding period of 2024 are given in brackets for comparison

In the period January-March 2025, there was no passenger vessel traffic in the direction of the Danube Delta, with the exception of a few passages without passengers (statistics from the Mohács checkpoint).

2 Navigation Conditions in the First Half of 2025

In the first quarter of 2025, water levels on the Danube River were mostly maintained above or around the LNWL (Low Navigable Water Level) values. In the first half of March, water levels on the Middle Danube dropped below the LNWL for several days.

In January, on the Upper Danube (Fig. 1), minimum and average water levels (the latter is abbreviated sometimes as MWL) were 70 cm lower than in January 2024, and maximum levels were 30 cm lower. The lowest levels were observed at the beginning and in the second half of the final third of the month.

On the Middle Danube (Fig. 2), minimum water levels were 150 cm lower than in January 2024, average levels were 220 cm lower, and maximum levels were 270 cm lower. The lowest levels were observed at the beginning of the month and in the middle of the final third of the month.

On the Lower Danube (Figs. 3, 4), minimum water levels were 270-280 cm lower than in January 2024, average levels were 290 cm lower, and maximum levels were 220 cm lower. The lowest levels were observed in the second half of the first third and at the end of the final third of the month.

In February, on the Upper Danube (Fig. 1), minimum water levels were 80 cm lower than in February 2024, average levels were 70 cm lower, and maximum levels were 50 cm lower. The lowest levels were observed at the beginning of the second ten-day period and at the end of the month.

On the Middle Danube (Fig. 2), minimum water levels were 200 cm lower than in February 2024, average levels were 190 cm lower, and maximum levels were 70 cm lower. The lowest levels were observed at the end of the month.

On the Lower Danube (Figs. 3, 4), minimum water levels were 250-270 cm lower than in February 2024, average levels were 260 cm lower, and maximum levels were 230-240 cm lower. The lowest levels were observed in the second half of the final third of the month.

In March, on the Upper Danube (Fig. 1), minimum and average water levels were 80 cm lower than in March 2024, and maximum levels were 70 cm lower. The lowest levels were observed in the first half of the second ten-day period of the month.

On the Middle Danube (Fig. 2), minimum water levels were 140 cm lower than in March 2024, and average and maximum levels were 130 cm lower. The lowest levels were observed at the end of the first and beginning of the second third of the month; in addition, over a period of six days, the water levels reached or dropped below the LNWL value.

On the Lower Danube (Figs. 3, 4), minimum water levels were 200-230 cm lower than in March 2024, average levels were 140-190 cm lower, and maximum levels were 20-90 cm lower. The lowest levels were observed at the beginning of the month.

In the second quarter of 2025, water levels on the Danube were mainly maintained above the LNWL, but the monthly lowest levels were on average lower than in the second quarter of 2024. In addition, on the Upper Danube in the second half of May and June, levels occasionally dropped below the LNWL. It should also be noted that there was a sharp drop in levels below the LNWL on the Lower Danube at the end of June.

In April, minimum, average (MWL), and maximum water levels on the Upper Danube (Fig. 1) were lower than the corresponding values in April 2024 by an average of 90 cm. Maximum levels were observed at the beginning of the month, but they did not even reach the minimum levels in April 2024. The lowest levels were observed in the second half of the second third and at the beginning of the final third of the month.

On the Middle Danube (Fig. 2), minimum water levels were 120 cm lower than the corresponding values in April 2024, and the average levels were 90 cm lower. Maximum levels were observed at the beginning of the month, but they did not reach even the minimum levels in April 2024. The lowest levels were observed in the second half of the second third of the month.

On the Lower Danube (Fig. 3, 4), minimum water levels were 30-40 cm lower than the corresponding values in April 2024, average levels were 50 cm higher (Novo Selo) or 70 cm lower (Silistra), and maximum water levels were 130-140 cm higher than the corresponding values in April last year. Maximum levels were observed during the second half of the first and the first half of the second third of the month. The lowest levels were observed in the second half of the final third of the month.

In May, on the Upper Danube (Fig. 1), minimum water levels were 100 cm lower than in May 2024, average levels were 120 cm lower, and maximum levels were 140 cm lower. Maximum levels were observed in the second half of the first third of the month, but they

did not even reach the minimum water levels in May 2024. Minimum levels were observed during the second half of the second third and the first half of the final third of the month. For 18 days, the levels reached or were below the LNWL value.

On the Middle Danube (Fig. 2), minimum water levels were 130 cm lower than the corresponding values in May 2024, average levels were 120 cm lower, and maximum levels were 110 cm lower. Maximum levels were observed in the second half of the first third of the month, but they did not even reach minimum levels in May 2024. Minimum levels were observed at the end of the second and beginning of the final third of the month.

On the Lower Danube (Figs. 3, 4), minimum water levels were 50 cm lower than in May 2024, average levels were 40 cm lower, and maximum levels were 30 cm lower. Maximum levels were observed at the beginning of the month. Minimum levels were observed in the middle of the final third of the month.

In June, on the Upper Danube (Fig. 1), minimum water levels were 190 cm lower than in June 2024, average levels were 270 cm lower, and maximum levels were 460 cm lower. Maximum levels were observed at the beginning and end of the month, but they did not even reach the minimum levels in June 2024. Lowest levels were observed in the final third of the month. For 14 days, they reached or were below the LNWL value.

On the Middle Danube (Fig. 2), minimum water levels were 230 cm lower than in June 2024, average levels were 290 cm lower, and maximum levels were 370 cm lower. Maximum levels were observed in the second half of the first third of the month, but they did not even reach the minimum levels in June 2024. Lowest levels were observed in the second half of the final third of the month.

On the Lower Danube (Figs. 3, 4), minimum water levels were 210-230 cm lower than the corresponding values in June 2024, average levels were 200-260 cm lower, and the maximum levels were 180-260 cm lower. Maximum levels were observed at the beginning of the month, but they did not even reach minimum levels in June 2024. Lowest levels were observed at the end of the month and dropped below the LNWL value.

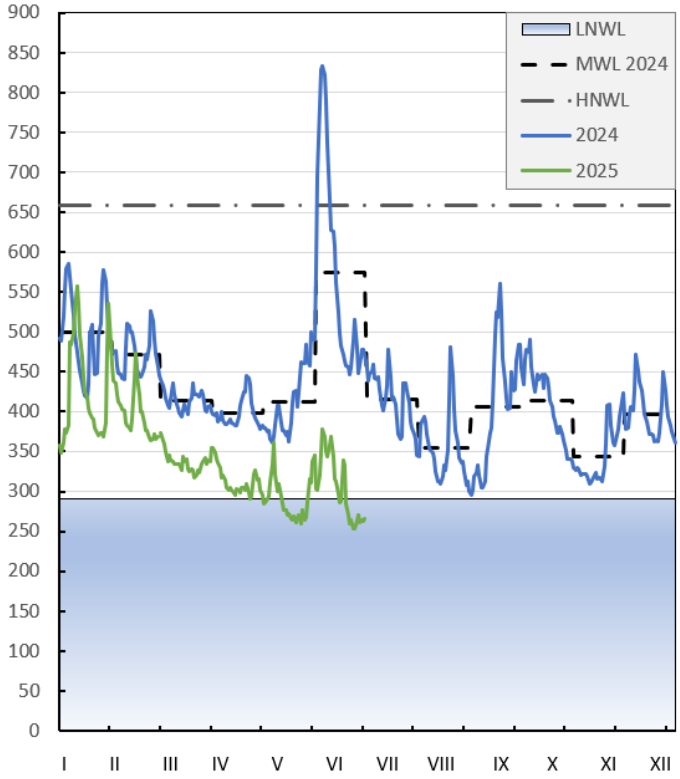

Figure 1. Daily water levels for the Pfelling gauging station (DE), (km 2306+530), in cm

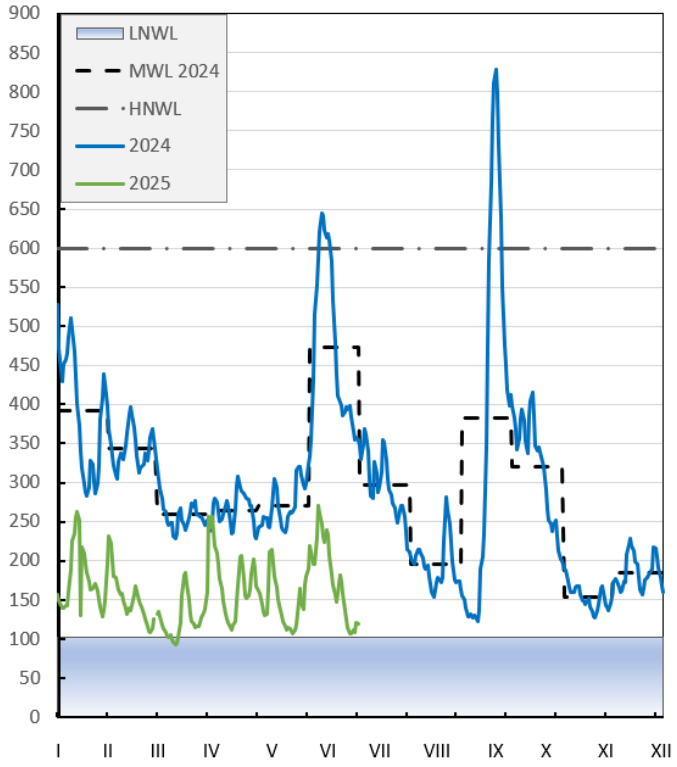

Figure 2. Daily water levels for the Budapest Vigadó station (HU), (km 1646+500), in cm

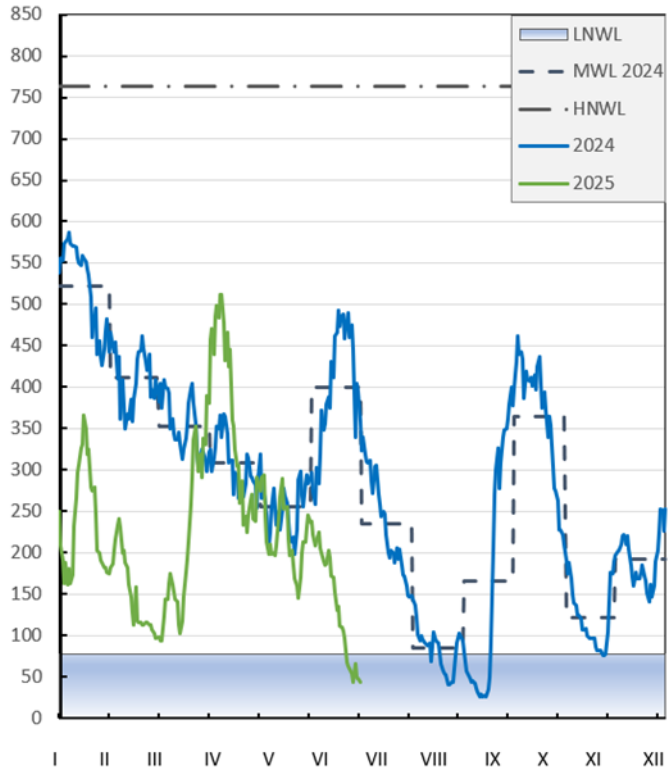

Figure 3. Daily water levels for the Novo Selo gauging station (BG), (km 833+600), in cm

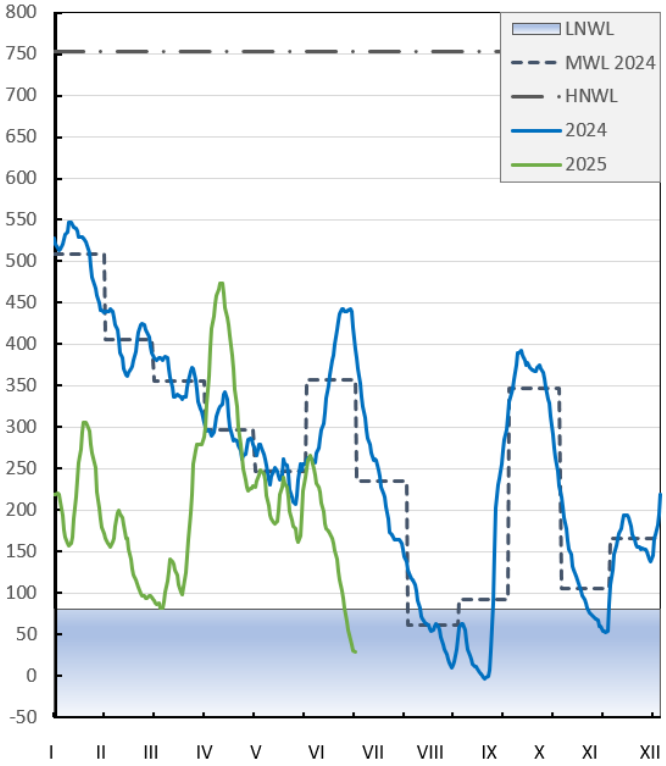

Figure 4. Daily water levels for the Silistra gauging station (BG), (km 375+000), in cm

The stable water flows required for effective navigation were maintained during the first quarter of 2025 (presented already in our previous report), allowing vessels to be loaded to a draught of 2.5-2.7 m when going upstream (Table 2.1).

In the second quarter of 2025, water levels on the Danube were, on average, lower than in the second quarter of 2024 in terms of absolute values of key indicators (primarily minimum levels). On the Upper Danube, water levels dropped below the LNWL value at times in the second half of May, and then in June. On the Lower Danube, a sharp drop in water levels was observed at the end of June, leading to a significant reduction in available draughts (Table 2.1) and occasional stoppages of traffic on certain sections.

Table 2.1. Draughts of cargo vessels during the first half of 2025 navigation season (cm)

Month/draught	Upstream	Downstream
January	250/270 (250*)	220/230 (220/230*)
February	270 (270*)	230 (230*)
March	270 (270*)	230/240 (220/240*)
April	230 (270*)	210/230 (230/240*)
May	230 (270*)	210/230 (230/240*)
June	230 (270*)	220/230 (230/240 *)

* Indicators for the corresponding period of 2024 are given in brackets for comparison

3 Dynamics of the freight and passenger transport market in the first half of 2025

3.1 Passenger transport

3.1.1 Transport on the Upper Danube (statistics from the Jochenstein and Gabcikovo locks)

On the Upper Danube a relatively stable passenger transport on cruise ships with cabins began in April. Passenger transport on cruise ships with cabins is based on "short" trips lasting 5-7-8 days, such as Passau - Vienna-Bratislava-Budapest-Passau, Vienna - Bratislava - Budapest, trips to/from the ports of Rhine and Main, as well as to the Danube Delta (Table 3.1):

- The Jochenstein lock (cross-border traffic Austria/Germany, AT/DE) recorded 1,736 vessel passages, which is 152% of the number in the first half of 2024.
- On the vessels passing through the Gabčíkovo lock (cross-border traffic between Hungary and Slovakia, HU/SK), conditionally referred to as the "Upper Danube", recorded 1,788 (in 2024 – 1,560) ship passages (upstream/downstream ratio – 882/906), of which 31% were in May and 32% in June. A total of 259,000 passengers

(upstream/downstream) were transported in the first half of the year, which exceeds the passenger traffic figure for 2024 by 24%.

Table 3.1. Passenger transport dynamics (in thousands)

Line/ Year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Upper Danube (Gabčíkovo)	149	469	562	610	209	259
Danube Delta (Mohács)	34	74	29	9	5	0.810

3.1.2 Transport on the Middle Danube (statistics of the Mohács checkpoint) (cross-border traffic Hungary/Croatia/Serbia (HU/HR/RS)

The services being represented here are based on routes from Passau and Vienna to the Danube Delta, lasting 14-15-16 days. In the first quarter, there was virtually no passenger ship traffic. A total of 810 passengers were transported in the first half of the year, all downstream. (Table 2.2). It should also be noted that there were occasional passages of passenger ships with cabins through the Iron Gate 1 (SRB) lock (the Secretariat does not have Statistical data on Iron Gate 2 (RO)) towards the Lower Danube.

Due to the extremely low volume of passenger traffic on the Lower Danube (Danube–Black Sea Canal), data for this segment is not included in the current publication.

3.2 Freight transport

3.2.1 Transport on the Upper Danube (statistics from the Jochenstein and Gabcikovo locks)

Transport volume

The volume of freight transport through the Jochenstein lock (cross-border traffic Germany/Austria, DE/AT) in the first half of 2025 amounted to 1,158 thousand tonnes, which is 78% of the volume in 2024.

The volume of registered cargo transported through the Gabcikovo lock (cross-border traffic between Hungary and Slovakia, HU/SK) in the first half of 2025 amounted to over 2,100 thousand tonnes, which is 89% of the volume in 2024. Upstream transit amounted to about 965 thousand tonnes, or about 45% of the total volume in 2024 (Fig. 5).

A total of 1,666 thousand tonnes of dry cargo was transported, of which:

- upstream – 911 thousand tonnes;
- downstream – 756 thousand tonnes.

The liquid cargo volume transported amounted to 467 thousand tonnes, of which:

- upstream – 55 thousand tonnes;
- downstream – 413 thousand tonnes.

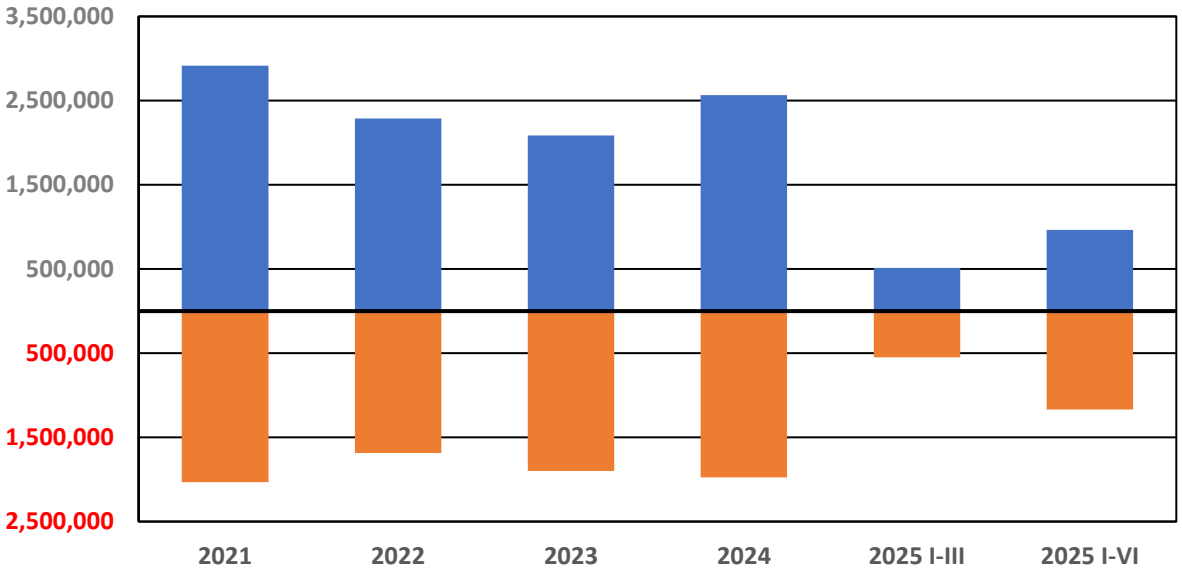

Figure 5. Transport volume at the GABČIKOVO lock in upstream and downstream traffic on the Danube River, per year in tonnes

Fleet traffic

Transport by pushed convoys (statistics from the Gabchikovo lock)

In the first half of 2025, a total of 1,055 thousand tonnes were transported by pushed convoys, which is 104% of the volume in 2024 and 49% of the total volume of cargo passing through the Gabchikovo lock, including bulk cargo. Of these:

- upstream – 424 thousand tonnes;
- downstream – 631 thousand tonnes.

In terms of dry cargo volumes, 873 thousand tonnes were transported by pushed convoys, of which:

- upstream – 413 thousand tonnes, which is 45% of the volume of dry cargo transported upstream;
- downstream – 460 thousand tonnes, which is 61% of the volume of dry cargo transported downstream.

In terms of liquid cargo volumes, 182 thousand tonnes were transported by non-motorized barge-tankers as part of convoys, of which:

- upstream – 11 thousand tonnes;
- downstream – 171 thousand tonnes.

Transport by motorized vessels

In total, in the first half of 2025, motorized vessels transported about 1,079 thousand tonnes, of which:

- upstream – 541 thousand tonnes;
- downstream – 537 thousand tonnes.

Motorized dry cargo vessels transported a total of 793 thousand tonnes, which amounted to 68% of the volume in 2024, of which:

- upstream – 497 thousand tonnes;
- downstream – 296 thousand tonnes.

Motorized tankers carried a total of 286 thousand tonnes of liquid cargo, of which:

- upstream – 44 thousand tonnes;
- downstream – 242 thousand tonnes.

Nomenclature of goods:

The market features for the first half of 2025, as shown in this section (Fig. 6), are characterized by:

a) decrease in the volume of upstream transport of food and forages, as well as grain and fertilizers, while the volume of both upstream and downstream transport of iron ore raw materials has remained relatively stable – 115 thousand tonnes (Q_1+Q_2) 2024 – 131 thousand tonnes);

b) an increase in the volume of downstream transport of petroleum products, fertilizers, metal products, and solid mineral fuels – 204 thousand tonnes (Q_1+Q_2) 2024 – 143 thousand tonnes);

The ratio of the main cargo volumes in upstream and downstream transport, as well as their absolute values at this control point (cross-border traffic Hungary/Slovakia, HU/SK) are presented in Tables 3.2-3.3.

Table 3.2. Cargo volumes at the Upper Danube HU/SK cross-border point (going upstream, thousand tonnes)

Commodity group/year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Food products and animal feed	879	783	592	890	560	227
Iron ore raw materials	969	735	726	720	346	335
Grain	394	416	427	568	313	211
Metal products	71	101	56	53	23	15
Petroleum products	87	92	41	35	25	12
Organic and synthetic fertilizers	133	75	55	119	80	39

Table 3.3. Cargo volumes at the Upper Danube HU/SK cross-border point (going downstream, thousand tonnes)

Commodity group/year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Organic and synthetic fertilizers	465	445	418	347	220	229
Petroleum products	870	642	653	688	300	422
Metal products	140	173	155	169	74	124

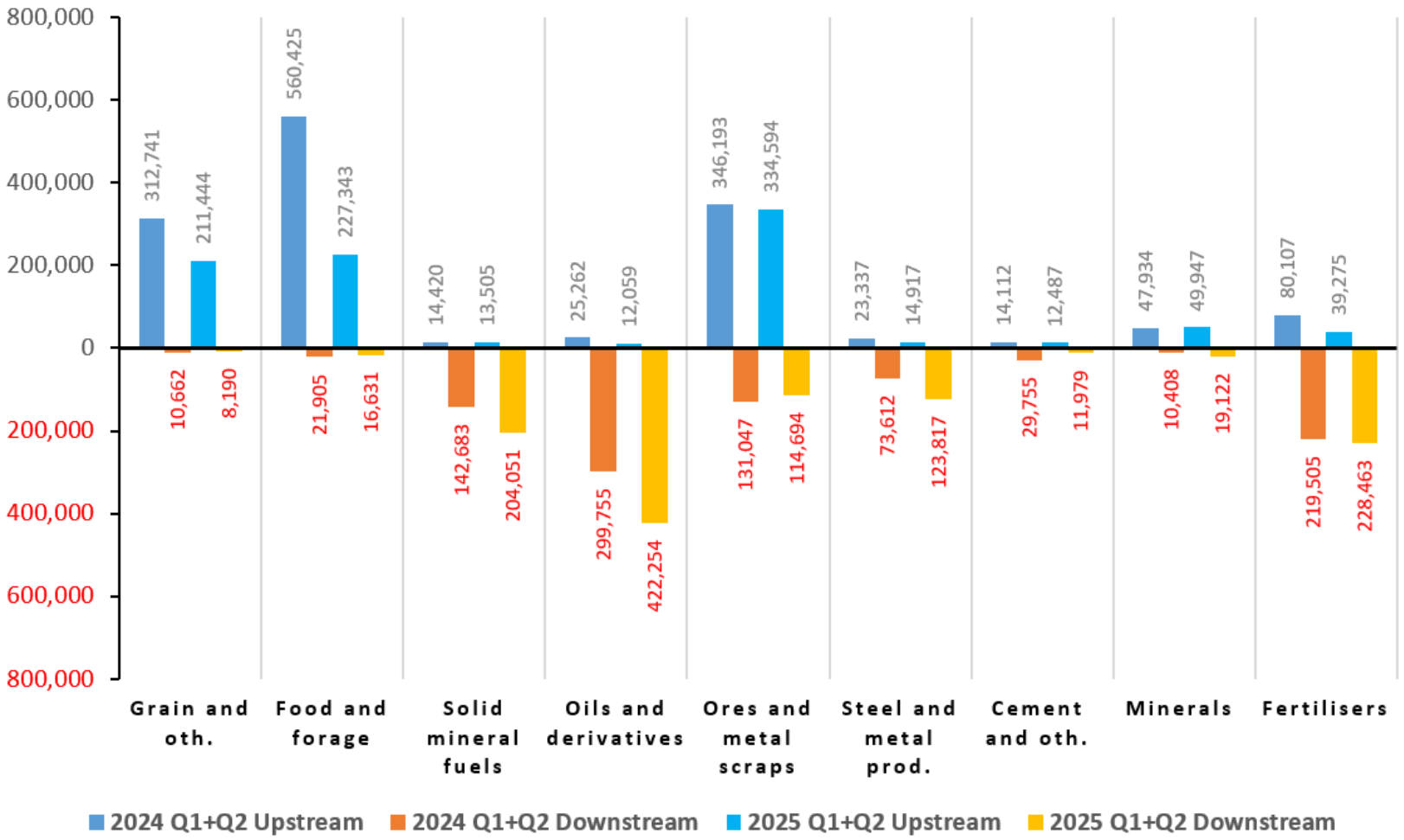

Figure 6. Commodity structure of cargo transport upstream/downstream the Danube River through the Gabčíkovo lock, in tonnes

3.2.2 Transport on the Middle Danube (statistics of the Mohács checkpoint) (cross-border traffic Hungary/Croatia/Serbia (HU/HR/RS)

Transport volume

The volume of registered cargo transported through Mohács in the first half of 2025 amounted to 1,961 thousand tonnes (Fig. 7), or 93% of the volume of cargo transported in 2024, of which transit upstream amounted to 845 thousand tonnes, i.e. 43% (in 2024 – 45%).

1,618 thousand tonnes of dry cargo were transported, of which:

- upstream – 797 thousand tonnes,
- downstream – 821 thousand tonnes.

343 thousand tonnes of liquid cargo were transported, of which:

- upstream – 48 thousand tonnes,
- downstream – 295 thousand tonnes.

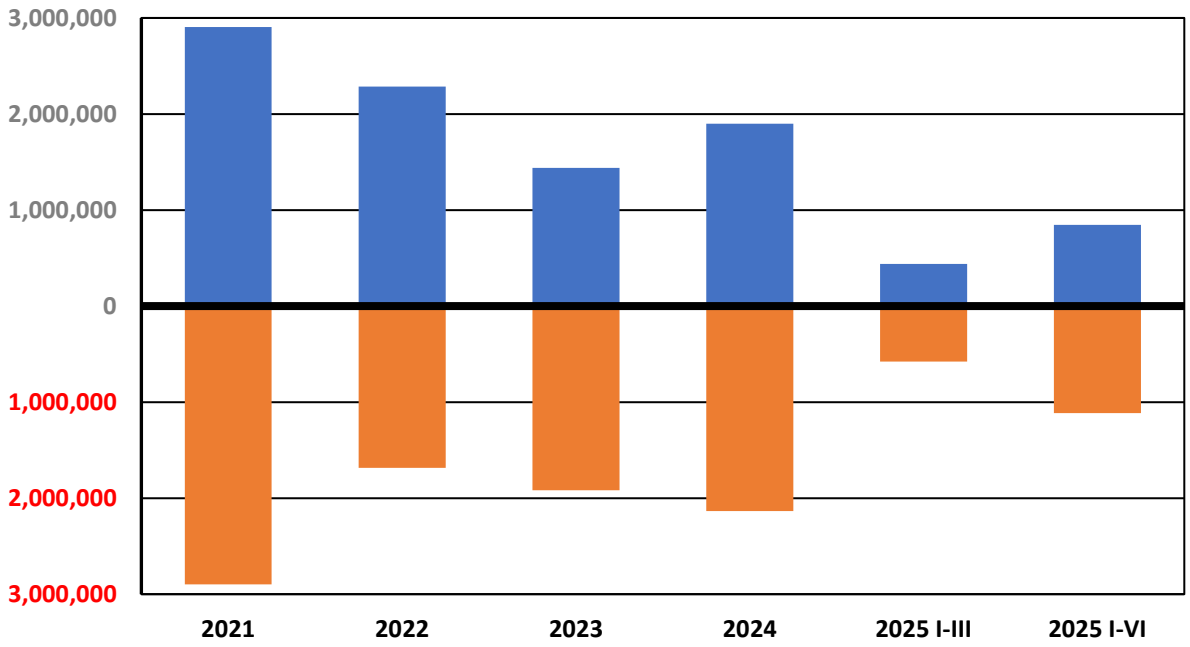

Figure 7. Transport volume in MOHÁCS in upstream and downstream traffic on the Danube per year in tonnes

Fleet traffic

Transport by pushed convoys

In total, in the first half of 2025, over 1,375 thousand tonnes of dry cargo were transported by pushed convoys through the Mohács checkpoint, which is 70% (in 2024 – 68%) of the total volume of cargo, including bulk cargo.

• upstream – 628 thousand tonnes;

• downstream – 664 thousand tonnes.

In terms of liquid cargo volumes, 82 thousand tonnes were transported by non-motorized tanker barges as part of convoys, of which:

• upstream – 3 thousand tonnes;

• downstream – 80 thousand tonnes.

Transport by motorized vessels

In total, 586 thousand tonnes were transported by motorized vessels in the first half of 2025, which is 30% of the total volume transported through the Mohács checkpoint, of which:

Motorized dry cargo vessels transported 326 thousand tonnes, of which:

• upstream – 169 thousand tonnes;

• downstream – 157 thousand tonnes.

Motorized tankers transported 260,000 tonnes of liquid cargo, of which:

• upstream – 45 thousand tonnes;

• downstream – 216 thousand tonnes.

Nomenclature of goods:

The market features for the first half of 2025 (Fig. 8) are as follows:

- a decrease in the volume of iron ore raw materials upstream (74% of the volume in (Q_1+Q_2) in 2024 and 71% of the volume in (Q1+Q2) in 2023), metal products, and petroleum products;
- the virtual absence of solid mineral fuel (coal) shipments upstream; and an increase in these shipments downstream – 247,000 tonnes (in 2024 – 203,000 tonnes);
- a decrease in the volume of grain cargoes downstream (48% of the volume in 2024) and stable volumes of grain cargoes upstream – 150 thousand tonnes (in 2024 – 167 thousand tonnes), as well as metal products downstream;
- stabilization of fertilizer and metal product transport volumes upstream and growth in petroleum product volumes downstream.

The ratio of the main volumes of cargo transported upstream and downstream and their absolute values at this checkpoint (cross-border traffic Hungary/Croatia/Serbia) are presented in Tables 3.4 and 3.5, and Figure 8.

Table 3.4. Cargo volumes at the Middle Danube HU/RS cross-border point (upstream, thousand tonnes)

Commodity group/ year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Iron ore raw materials	991	741	692	747	364	271
Coal (coke)	281	200	2	24	12	0
Fertilizers	385	256	121	209	74	185
Petroleum products	117	252	154	243	126	47
Metal products	249	205	111	186	136	58

Table 3.5. Cargo volumes at the Middle Danube HU/RS cross-border point (downstream, thousand tonnes)

Commodity group/year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Grain	1,002	239	317	441	284	137
Petroleum products	591	322	405	376	215	294
Metal products	254	310	381	357	189	184
Food products and animal feed	219	65	216	47	13	26
Fertilizers	316	316	186	280	190	177

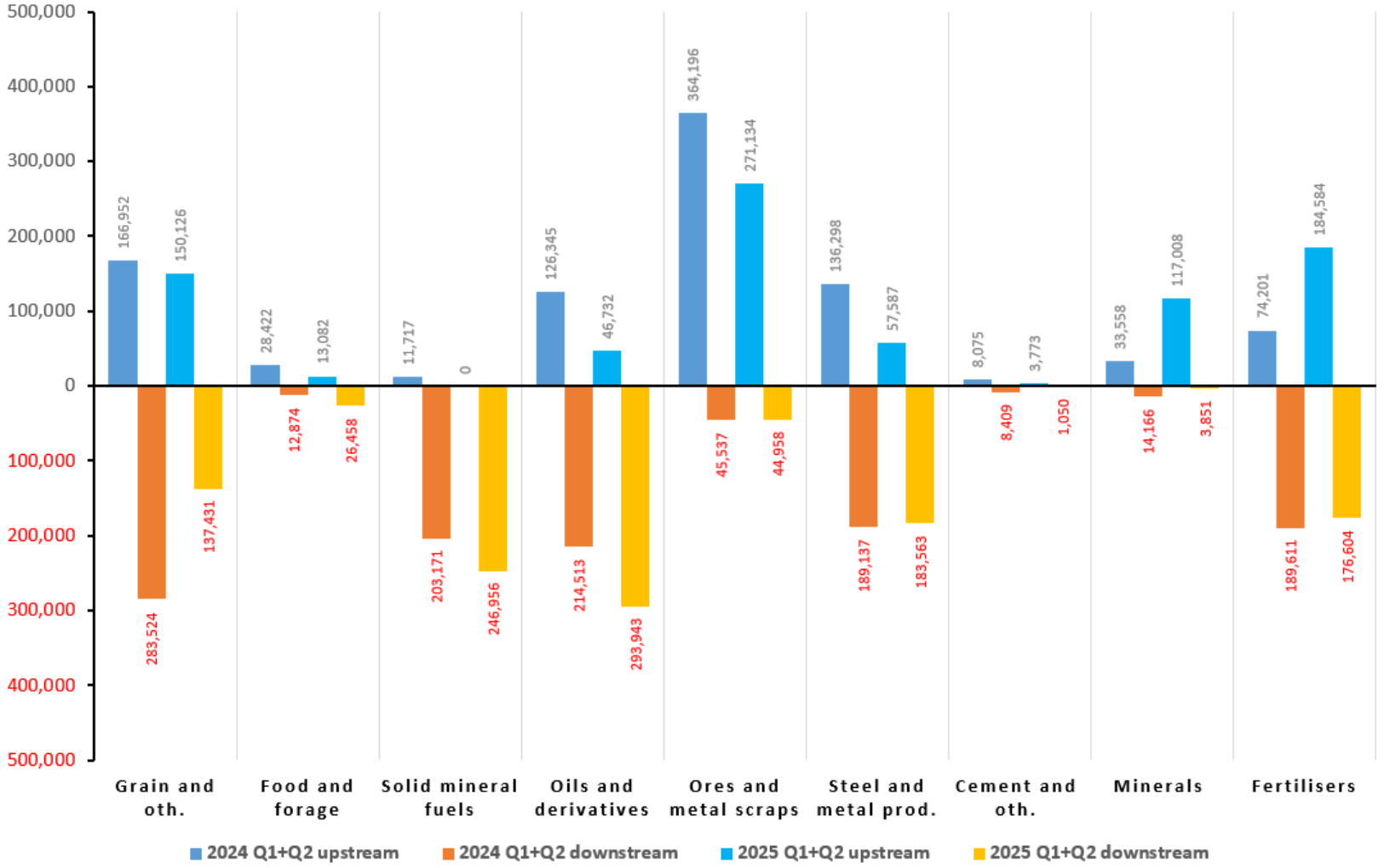

Figure 8. Commodity structure of cargo transport upstream/downstream the Danube River through Mohács, in tonnes

3.2.3 Transport on the Lower Danube (statistics of the Danube-Black Sea Canal)

The volume of transport on the Danube-Black Sea Canal in the first half of 2025 amounted to 6,899 thousand tonnes, which is 68% of the same indicator in 2024, of which:

• international transport: 4,967 thousand tonnes (62% of the 2024 figure);

• domestic transport: 1,932 thousand tonnes (88% of the 2024 figure).

Transport volumes by month are shown in Fig. 9.

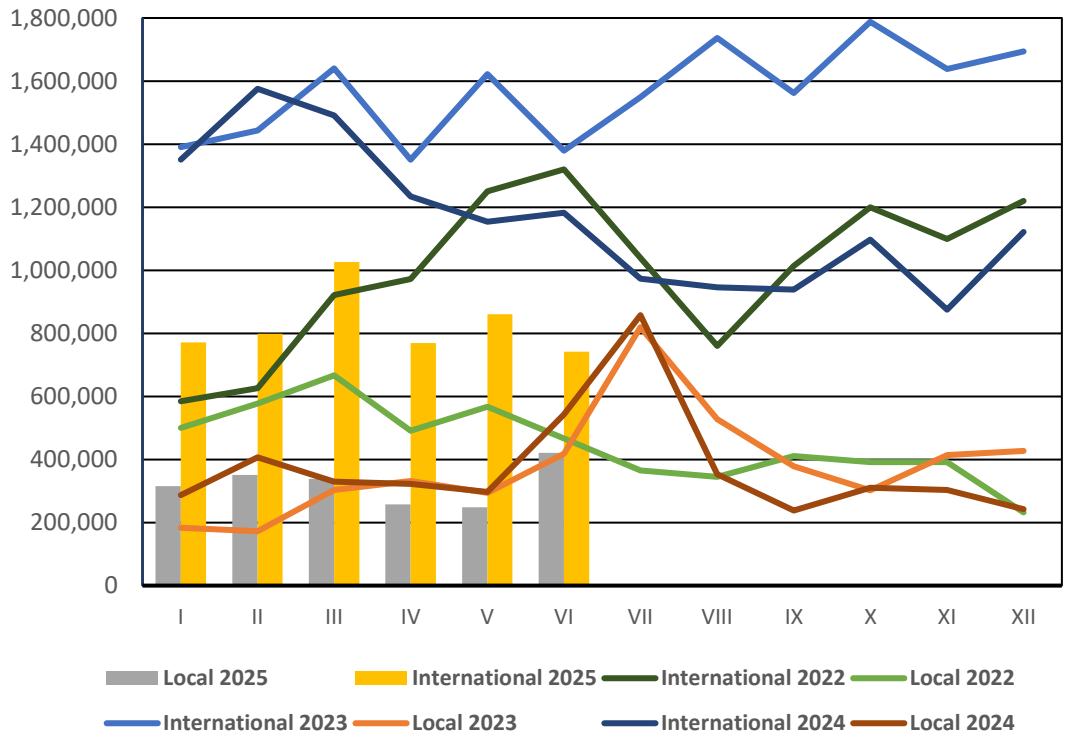

Figure 9. Volumes of international and national cargo transport through the Danube – Black Sea Canal, by month, in tonnes

4 General characteristics of cargo turnover at Danube ports

Cargo turnover at Danube ports in the first half of 2025 (Q_1+Q_2) compared to (Q_1+Q_2) in 2024 varied in different directions (Table 4.1).

Table 4.1. Cargo turnover of the ports of the Danube countries in recent years, (thousand tonnes)

Country/year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Germany	2,999	2.410	2.228	2.047	1,244	1,001
Austria	7,112	5,484	5,123	5,349	2,838	2,632
Slovakia*	1,846	1,934	1,509	1,473	721	802
Hungary	5,715	4,063	3,604	4,019	2,163	2,022
Croatia**	697	582	364	392	164	133
Serbia**	13,610	12,023	12,031	12,816	6,463	6,627
Bulgaria	7,111	7,104	7,026	7,520	3,623	3,306
Romania	28,457	24,355	28,857	23,759	13,103	9,049
Republic of Moldova	1,819	2,144	2,668	2,579	1,254	1,078
Ukraine	5,505	16,505	32,021	17,396	10,273	4,464

* Only Bratislava and Komarno
** The rows for Croatia and Serbia also include the countries' transport volumes on the Sava River

The decline in the total cargo turnover of Ukraine's Danube ports, as well as their export cargo turnover in the first half of 2025 (Q_1+Q_2), clearly reflects the consequences of Russian attacks on port infrastructure (Tables 4.2 - 4.3). At the same time, under the current circumstances, Ukraine's Danube ports are demonstrating their desire to restore their activity and cargo turnover dynamics as much as possible by implementing a set of decisive measures taken by the Ukrainian government with the support of the European Union and the Danube Commission. These measures are aimed at ensuring the export of agricultural products and other cargoes through the ports of Reni, Izmail, and Ust-Dunaysk, as well as the import of goods necessary for the country.

Table 4.2. Cargo turnover of Ukrainian Danube ports (river+sea), (thousand tonnes)*

Period/port	Izmail	Reni	Ust-Dunaisk
2024	13,448	3,431	517
2024 (Q_1+Q_2)	7,462	2,489	322
2025 (Q_1+Q_2)	3,878	485	101

* Data received from the Administration of Sea Ports of Ukraine

Table 4.3. Cargo turnover of Ukrainian Danube ports (river+sea) in the first quarter of 2025 (thousand tonnes, export)*

Type of good/port	Izmail	Reni	Ust-Dunaisk
Cereals	708 (3,238)	67 (906)	0 (150)
Liquids (oil)	84 (456)	12 (363)	0
Other bulk goods	486 (537)	36 (347)	11

* Data received from the Administration of Sea Ports of Ukraine

**Figures in parentheses represent cargo turnover data for (Q_1) 2024

5 Conclusions

In the first half of 2025, the full-scale Russian military aggression against Ukraine continued to pose real threat to the safety of navigation on the Lower Danube. Frequent attacks on the infrastructure of Ukraine's Danube ports further increased the economic risks that had emerged in 2024. These developments had a negative impact on virtually all major sectors of the Danube shipping market and influenced its overall dynamics during the first half of 2025.

Taking into account the security threats outlined in Section 1, as well as the unfavorable navigation conditions in the first half of 2025 (particularly, at the end of the second quarter), changes occurred in the passenger transport market for ships with cabins. Changes were also observed in both the absolute values and relative ratios of the cargo nomenclature, affecting both transport volumes and port cargo turnover.

The Danube Commission continues to work on special coordination measures within the framework of the *Danube Solidarity Lanes EU-Ukraine* initiative, adopted in May 2022, in support of the European Union's solidarity measures with Ukraine. These measures aim to maximize the potential of Danube navigation for stabilizing transport to/from Ukraine's Danube ports, ensuring the operation of the Danube-Black Sea Canal connections, and enhancing navigation safety.

In the short term, the Danube Commission is prioritizing market stabilization and the safety of navigation, including the coordination of cargo shipments to support the restoration of Ukraine’s transport and energy infrastructure.