

# Market Observation for Danube Navigation: Results for the period January-September 2024

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|--------------------------------|--|
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## 1 Overview of the Danube navigation market: 9 months in 2024

### 1.1 Initial state of the Danube transport market in 2024

The initial state of the main sectors of the Danube River shipping market during the first nine months of 2024 was determined by the overall results of 2023, the market dynamics of the first half of 2024, and the forecasts of the relative growth of the gross domestic product of the Member States of the European Union and the Eurozone compared to 2023.

The initial state of the shipping market in 2024 was determined by the consequences of Russia's full-scale military invasion of Ukraine, which began in February 2022 and resulted in additional risks and distortions in certain shipping sectors of the Danube shipping market, weak steel consumption, rising prices for energy resources and raw materials, which caused a partial reorientation of the market.

In connection with the blockade of Ukrainian seaports by Russia and to ensure world food security, the Ukrainian Grain Corridor, based on the ports of Odesa, Pivdennyi, and Chernomorsk, was established and is maintained by the Armed Forces of Ukraine. Despite the systematic bombing of port infrastructure by Russia, including adjacent civilian facilities, and targeting of foreign-flagged vessels moored at or en route to these ports for cargo operations, the cargo turnover of Ukrainian ports, including ports of the Danube cluster, amounted to about 80 million tonnes of cargo in the period under review in 2024. Of this volume, over 50 million tonnes are Ukrainian agricultural products.

During the first nine months of 2024, Russia conducted a number of air attacks on Ukraine's port infrastructure on the Danube.

As a result of these attacks, in particular, on the nights of 24-25 July, 26-27 September, and 1-2 October 2024, port infrastructure, grain hangars, warehouses, administrative and civilian buildings were destroyed in the Danube ports of Ukraine. The work of the

"Orlovka" checkpoint and the "Orlovka-Isakcha" ferry was disrupted. In addition, there were casualties among the civilian population.

In fact, Russia's aggressive actions on the Danube River have created conditions of direct security threats not only to the Danube port infrastructure of Ukraine but also to the entire shipping system on the Lower Danube, including the safety of ship crews and personnel. Nevertheless, the ports of the Danube region, despite constant bombing, continue to ensure stable operations, making a significant contribution to global food security.

During the current year, the Danube Commission continued its active work aimed at facilitating the export of Ukrainian products from the agricultural sector, as well as the import of goods needed by Ukraine. This work was carried out 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. The main focus was on supporting and developing logistics schemes for freight transport based on the Danube ports of Ukraine, the Republic of Moldova, and Romania, as well as Danube-Black Sea canal connections.

The work within the *Danube Solidarity Lanes EU-Ukraine* initiative, despite the high activity of the Ukrainian Grain Corridor, is still extremely important. It should be noted that in the structure of cargo turnover of ports of the Ukrainian Danube cluster, along with the export of agricultural products, an increase in cargo flows of iron ore raw materials (exports) and fuel (imports) plays a significant role.

## 1.2 Transportation market dynamics in the first half of 2024

### 1.2.1 Water flow and operating draught of vessels

Snow reserves in the Danube River basin at the beginning of 2024 were estimated to be below the long-term average, while the absence of river freezing and ice phenomena ensured continuous navigation in the first quarter of 2024.

The stable water flow allowed vessels to be loaded to a maximum draught of 2.5 meters (2.7 m) during some periods throughout the first quarter and generally in the first half of 2024, which facilitated efficient navigation.

### 1.2.2 Market dynamics in the first half of 2024

The dynamics of the Danube cargo transport market in the first half of 2024 was formed in the context of the reorientation of certain traditional sectors. This was caused by the negative impact of the Russian aggression in Ukraine on the main industries and the agricultural sector of the economy in the Danube and adjacent basins.

Taking into account the relative stability of navigation conditions and partial market reorientation, cargo transport volumes in the first half of (Q<sub>1</sub>+Q<sub>2</sub>) 2024 are as follows:

- volumes of cargo transported via the Jochenstein lock (cross-border connection Germany/Austria) amounted to 1,485 thousand tonnes, which is 136.1 % of the volumes in (Q<sub>1</sub>+Q<sub>2</sub>) 2023;

- volumes of cargo transport through the Gabčíkovo lock (cross-border connection Hungary/Slovakia) amounted to 2,406 thousand tonnes, which is 115.3% of the volumes in (Q<sub>1</sub>+Q<sub>2</sub>) 2023;
- volumes of cargo transport through Mohács (cross-border connection Hungary/Croatia/Serbia) amounted to 2,109 thousand tonnes, which is 130.3% of the volumes in (Q<sub>1</sub>+Q<sub>2</sub>) 2023;
- transport volumes through the Danube-Black Sea Canal in (Q<sub>1</sub>+Q<sub>2</sub>) 2024 amounted to 10,174 thousand tonnes (96.6 % of the same indicator in 2023).

### 1.2.3 Port cargo turnover

In the first half of the year (Q<sub>1</sub>+Q<sub>2</sub>) 2024 port cargo turnover varied differently (Table 1.1).

**Table 1.1.** Cargo turnover of ports in the Danube countries in 2020-2024, (thousand tonnes)

| Ports                  | 2020   | 2021   | 2022   | 2023   | 2023<br>Q <sub>1</sub> +Q <sub>2</sub> | 2024<br>Q <sub>1</sub> +Q <sub>2</sub> |
|------------------------|--------|--------|--------|--------|--|--|
| Germany                | 3,511  | 2,999  | 2,410  | 2,228  | 1,047                                  | 1,252*                                 |
| Austria                | 6,050  | 6,356  | 5,363  | 4,460  | 2,506                                  | 2,642                                  |
| Slovakia               | 1,553  | 1,846  | 1,934  | 1,509  | 810*                                   | 721**                                  |
| Hungary                | 6,742  | 5,715  | 4,063  | 3,604  | 1,746                                  | 2,163                                  |
| Croatia                | 948    | 697    | 582    | 365.5  | 186.4                                  | 163.8                                  |
| Serbia                 | 8,164  | 13,610 | 12,023 | 12,031 | 6,628                                  | 6,463                                  |
| Bulgaria               | 5,431  | 7,111  | 7,104  | 7,026  | 4,004                                  | 3,623***                               |
| Romania                | 27,307 | 28,457 | 24,355 | 28,857 | 13,053                                 | 13,103                                 |
| Republic of<br>Moldova | 1,185  | 1,819  | 2,144  | 2,144  | 1,238                                  | 1,254***                               |
| Ukraine                | 4,055  | 5,505  | 16,505 | 32,021 | 15,146                                 | 10,273***                              |

\* January-April, total cargo turnover on the Bavarian section of the waterway

\*\* Bratislava and Komarno ports

\*\*\* Data obtained from the maritime administrations of Bulgaria, the Republic of Moldova and Ukraine

The cargo turnover of the main Danube ports of Ukraine, as well as their cargo turnover in export, are given in Tables 1.2-1.3.

**Table 1.2.** Cargo turnover of Ukrainian Danube ports in the first half of the year (Q<sub>1</sub>+Q<sub>2</sub>) 2024 (thousand tonnes)\*

| Port/period/%                          | Izmail   | Reni     | Ust-Dunaisk |
|--|----------|----------|-------------|
| 2023                                   | 20,263.0 | 10,071.0 | 1,688.0     |
| % by 2022                              | 227.9    | 147.5    | 214.8       |
| (Q <sub>1</sub> +Q <sub>2</sub> ) 2024 | 7,462.0  | 2,489.0  | 322.1       |

**Table 1.3.** Cargo turnover of Ukrainian Danube ports in exports in the first half of the year (Q<sub>1</sub>+Q<sub>2</sub>) 2024 (thousand tonnes)

| Name of cargo | Izmail  | Reni    | Ust-Dunaisk |
|---------------|---------|---------|-------------|
| Grain         | 3,775.5 | 1,253.0 | 210.0       |
| Bulk (oil)    | 455.8   | 363.1   | 11.2        |

\* Data received from the Administration of Sea Ports of Ukraine

#### 1.2.4 Passenger transport

Relatively stable passenger transport on cruise passenger ships with cabins on the Upper Danube (Gabcikovo lock statistics) started in April: a total of 1,530 ship passages were made (765/795 up/down, respectively). In total, 208.7 thousand passengers were carried (Table 1.4).

**Table 1.4.** Dynamics of passenger transportation<sup>1</sup> (in thousands)

|                     | Year  |        |       |        |  |  |
|---------------------|-------|--------|-------|--------|--|--|
|                     | 2020  | 2021   | 2022  | 2023   | 2023<br>Q <sub>1</sub> +Q <sub>2</sub> | 2024<br>Q <sub>1</sub> +Q <sub>2</sub> |
| Upper Danube        | 56.10 | 149.10 | 469.3 | 561.50 | 209.90                                 | 208.70                                 |
| To the Danube Delta | 5.15  | 34.10  | 74.00 | 28.50  | 17.03                                  | 4.51                                   |

In the direction of the Danube Delta (statistics of the Port of Mohács), in the period January-March 2024, there was no passenger ship traffic, except for single passages without passengers; in total, in the first half of 2024 there were upstream - 32 ship passages, downstream - 3. Total number of passengers transported - 4.5 thousand.

<sup>1</sup> Own calculations of the Danube Commission Secretariat based on the Gabcikovo and Mohács data.

## 2 Market observation for 9 months: fleet and cargo traffic

### 2.1 Navigation conditions on the Danube River in 2024

#### 2.1.1 Navigation Conditions: 9 months 2024

In the first quarter of 2024, sufficiently stable navigation conditions for shipping were ensured throughout the Danube River.

In the second quarter of 2024, water levels on the entire Danube were consistently maintained above the low navigable water levels (LNWL), with reasonably stable navigation conditions for navigation.

In the third quarter of 2024, water levels on the Upper and Middle Danube were held above the LNWL level.

On the Lower Danube, the levels below LNWL were observed in August and the first two ten-day periods of September. The total number of days of not reaching the LNWL at the Novo Selo gauging station has reached 25 days (8-52 cm), and at the Silistra gauging station - 46 days (8-85 cm).

In July, on the Upper Danube (Figure 1), the minimum water level was 100 cm, the mean level 130 cm, and the maximum level 100 cm higher than in July 2023. Maximum levels were observed until half of the third decade of the month. Minimum levels were observed at the end of the month.

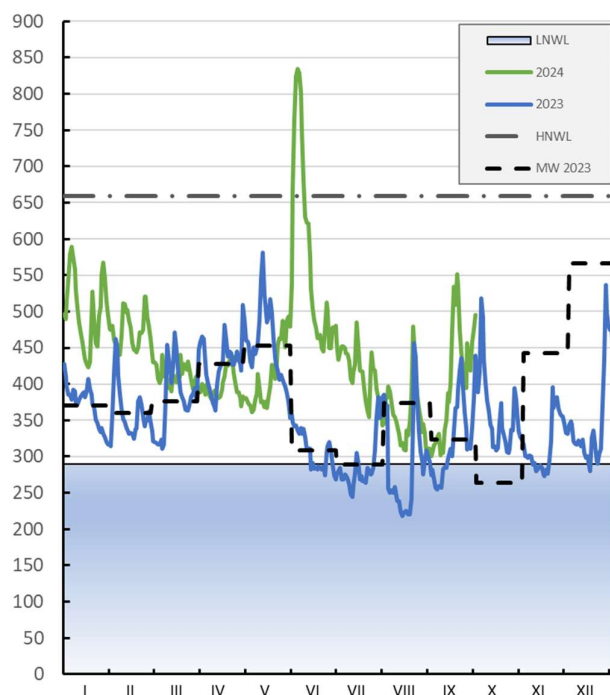
In the Middle Danube (Figure 2), the minimum water level was 90 cm, the mean water level 140 cm, and the maximum water level 170 cm higher than in July 2023. The maximum levels were observed until the end of the second ten-day period of the month. Minimum levels were observed at the end of the month.

In the Lower Danube (Figures 3 & 4), the minimum water level was 30-140 cm above the same value in July 2023; the mean by 30-220 cm and the maximum by 0 - 230 cm. The maximum levels were observed in the first decade of the month. Minimum levels were observed at the end of the month.

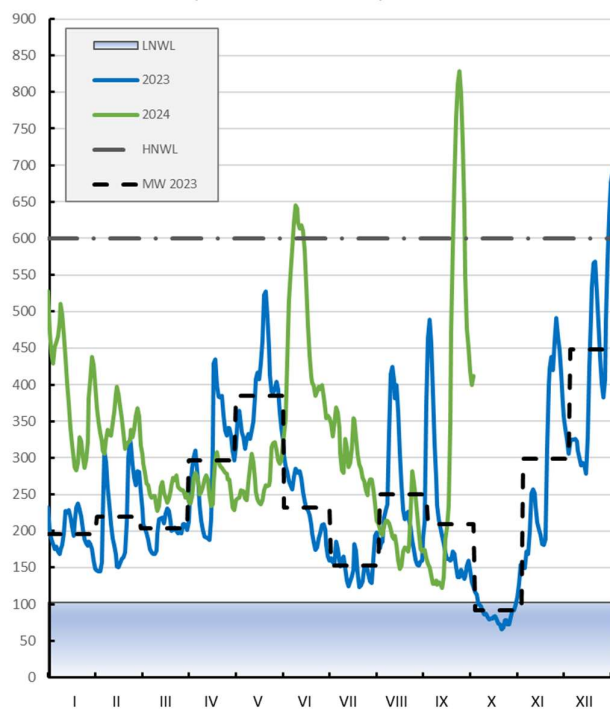
In August on the Upper Danube (Figure 1), the minimum water level was 40 cm above the same value in August 2023. The mean water level was 20 cm, and the maximum water level was 160 cm below the same value in August 2023. Maximum levels were observed at the beginning of the third decade of the month. Minimum levels were observed in the half of the first ten-day period and at the end of the month.

On the Middle Danube (Figure 2), the minimum water level was lower by 5 cm of the same value in August 2023, the mean by 50 cm, and the maximum by 140 cm. The maximum levels were observed at the beginning of the third decade of the month. Minimum levels were observed in the half of the first ten-day period and at the end of the month.

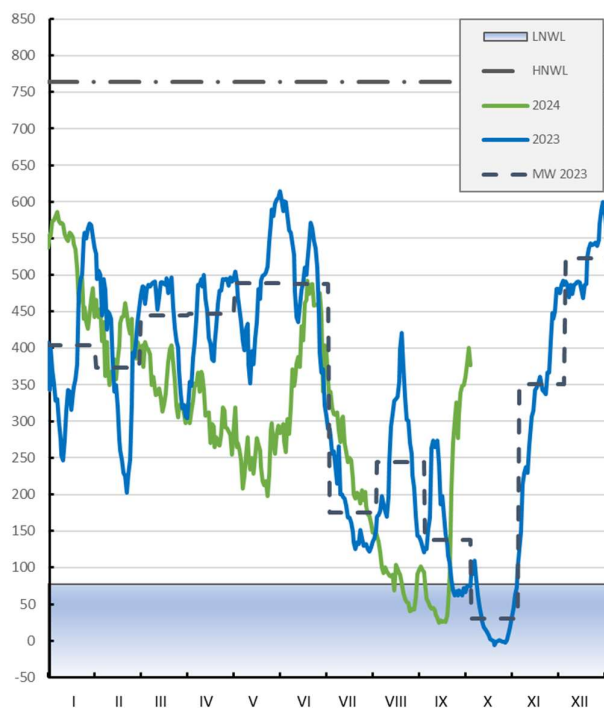
On the Lower Danube (Figure 3 & 4), the minimum water level was 10-110 cm lower than the same value in August 2023, the mean water level was 160 cm lower, and the maximum water level was also 220 cm lower. The maximum levels were observed at the beginning of the month. The minimum levels were observed in the third decade of the month.



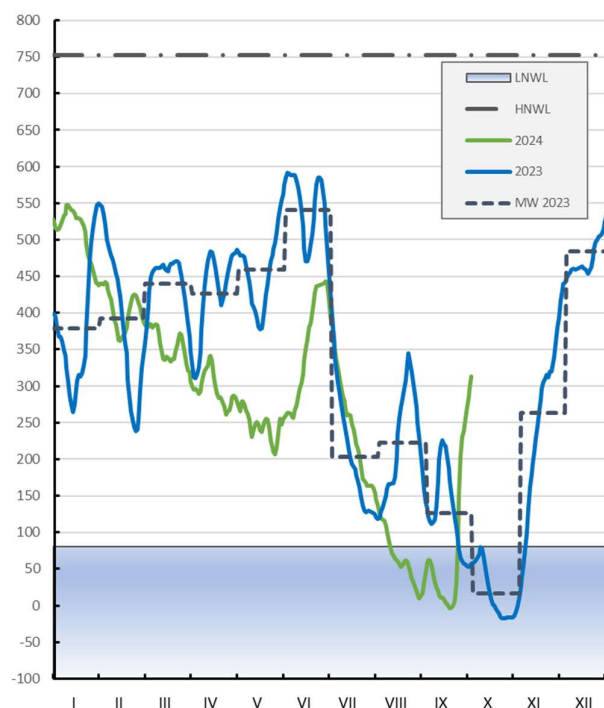
**Figure 1.** Daily water levels for the Pfelling gauging station (DE),  
(km 2306+530), in cm



**Figure 2.** Daily water levels for the Budapest Vidago gauging 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



**In September**, on the Upper Danube (Figure 1), the minimum water level was 30 cm above the same value in September 2023, and the mean water level was 20 cm above the same value in September 2023. The maximum water level in September was lower than the same value in September 2023 by 20 cm. Maximum levels were observed in the second half of the second ten-day period of the month. The minimum levels were observed at the beginning of the month.

On the Middle Danube (Figure 2), the minimum water level was similar to the values for the same month of 2023. The maximum levels were observed at the end of the first and beginning of the second decade of the month when they exceeded the LNWL by 40-230 cm, which in some areas caused the suspension of navigation. The minimum levels were observed in the second half of the first ten-day period of the month.

On the Lower Danube (Figure 3 & 4), the minimum water level was 20-50 cm below the same value in September 2023, the mean - 40-50 cm, and the maximum - 130 cm. The maximum levels were observed at the end of the month. Minimum levels were observed in the second decade of the month.

### 2.1.2 Water flow and operating draught of vessels

The stable water flows, required for efficient navigation, were ensured throughout the first half of the year and the third quarter of 2024, allowing for vessel loading to a relatively high draught for this navigation period (Table 2.1).

**Table 2.1.** Draughts of cargo vessels in the 2024 navigation season, in cm

| Month     | Draught in cm,<br>going upstream | Draught in cm,<br>going downstream |
|-----------|----------------------------------|------------------------------------|
| January   | 250 (250*)                       | 220/230 (220/230*)                 |
| February  | 270 (270)                        | 230 (230)                          |
| March     | 270 (270)                        | 230/240 (230/240)                  |
| April     | 270 (270)                        | 230/240 (230/240)                  |
| May       | 270 (270)                        | 230/240 (230/240)                  |
| June      | 270 (270)                        | 230/240 (230/240)                  |
| July      | 250 (270)                        | 220/230 (220/230)                  |
| August    | 200 (190)                        | 180 (170)                          |
| September | 250 (270)                        | 230/240 (230/240)                  |

\* Indicators for the corresponding period of 2023 are given for comparison

## 2.2 Observation of fleet traffic and cargo flows

### 2.2.1 Passenger transport

#### Transport on the Upper Danube

Relatively stable passenger transport on cruise passenger ships with cabins started in April.



The majority of passenger transport on ships with cabins are "short" voyages of 5-7-8 days. Most of those voyages are on the Upper Danube: Passau - Vienna - Bratislava - Budapest, voyages from/to the ports of Rhine and Main, as well as in the direction of the Danube Delta.

The dynamics of passenger transport on those lines, for 9 months ( $Q_1 + Q_2 + Q_3$ ) of 2024 is shown in Table 2.2.

**Table 2.2.** Passenger transport trends<sup>2</sup> (in thousands)

| Lines           | Year  |        |        |        |                       |                       |
|-----------------|-------|--------|--------|--------|-----------------------|-----------------------|
|                 | 2020  | 2021   | 2022   | 2023   | 2023<br>$Q_1+Q_2+Q_3$ | 2024<br>$Q_1+Q_2+Q_3$ |
| Upper Danube    | 56.10 | 149.10 | 469.30 | 561.50 | 443.60                | 448.50                |
| To Danube Delta | 5.15  | 34.10  | 74.00  | 28.50  | 27.50                 | 7.54                  |

- 531 ship passages were recorded through the Jochenstein lock (Austria/Germany cross-border connection, AT/DE), which is 113% of the number in ( $Q_1 + Q_2 + Q_3$ ) in 2023.
- Vessels passing through the Gabčíkovo locks (cross-border connection Hungary/Slovakia, HU/SK, conventionally "Upper Danube") recorded 1,584 upstream and 1,515 downstream passages. A total of 448.5 thousand passengers (upstream/downstream) were transported in the first 9 months of 2024, which corresponds to the level of passenger traffic in 2023.

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

- in the first quarter there were no passenger vessels, except for single passages without passengers;
- for 9 months in 2024 there were 6 upstream and 55 downstream ship passages. Accordingly, 7.538 thousand passengers were carried (downstream) (Table 2.2).

### 2.2.2 Freight transport

#### Transport on the Upper Danube

##### Transport volumes

- The volume of freight transported via the Jochenstein lock (cross-border connection Germany/Austria (DE/AT)) in 9 months ( $Q_1 + Q_2 + Q_3$ ) 2024 was 2,064 thousand tonnes, which is 124 % of the volume in 2023.
- The volume of registered cargo transported through the Gabčíkovo locks (cross-border connection Hungary/Slovakia (HU/SK)) in the first 9 months of 2024 amounted to more than 3,478 thousand tonnes, which is 144.4 % of the 2023 volume. The upstream transit amounted to about 2.006 thousand tonnes, or 57.9 % of the total volume (Figure 5).

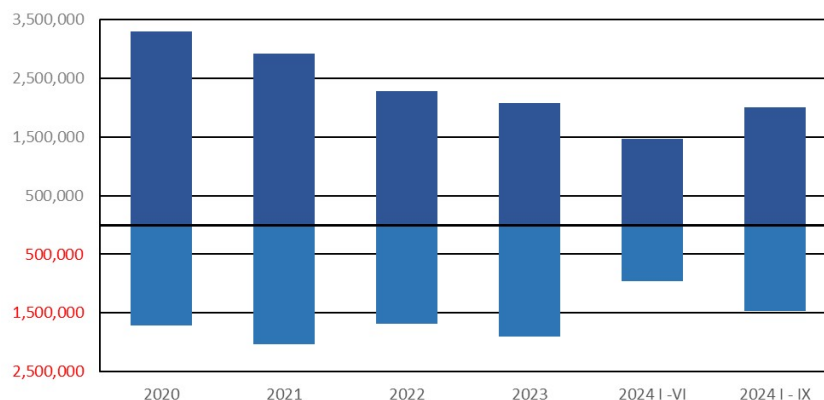
<sup>2</sup> Own calculations of the Danube Commission Secretariat based on the Gabčíkovo and Mohács data

Dry cargo – 2,883 thousand tonnes transported, of which:

- upstream – 1,929 thousand tonnes, and
- downstream – 954 thousand tonnes.

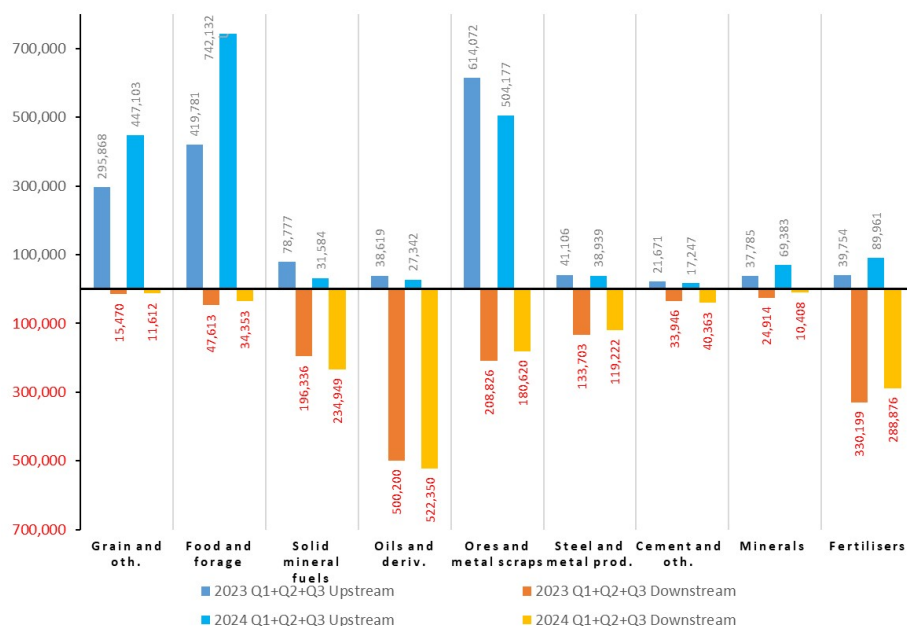
Bulk cargo 595.3 thousand tonnes transported, including:

- upstream – 76.3 thousand tonnes;
- downstream – 519 thousand tonnes.



**Figure 5.** Cargo transport volumes upstream/downstream the Danube River through the Gabčíkovo locks by year, in tonnes

The nomenclature of cargo in transit at a given monitoring section – conditionally on the Upper Danube (statistics of the Gabčíkovo locks) is given in Figure 6.



**Figure 6.** Commodity structure of cargo transport upstream/downstream the Danube through the GABČIKOVO locks, in tonnes

The market characteristics ( $Q_1+Q_2+Q_3$ ) 2024 in this transport segment (Figure 6) compared to the respective figures in 2023 are as follows:

- a) decrease in the volume of upstream transport of iron ore raw materials, as well as downstream transport of steel products;
- b) increasing upstream transport of grain, food and feed cargo, and downstream transport of oil products;
- c) stable downstream trend in petroleum product transport volumes.

The absolute ratio of the main cargo volumes in upstream and downstream traffic at this monitoring section (cross-border traffic Hungary/Slovakia (HU/SK)) is presented in Tables 2.3 and 2.4.

**Table 2.3.** Cargo volumes (by nomenclature), transported in cross-border traffic HU/SK: upstream

| Year, thousand tonnes<br>Commodity group | 2020  | 2021  | 2022 | 2023 | 2023<br>$Q_1+Q_2+Q_3$ | 2024<br>$Q_1+Q_2+Q_3$ |
|--|-------|-------|------|------|-----------------------|-----------------------|
| Food and feed cargoes                    | 1,321 | 879   | 783  | 592  | 420                   | 742.1                 |
| Iron ore                                 | 948   | 969   | 735  | 726  | 614                   | 504.2                 |
| Grain                                    | 352   | 394   | 416  | 427  | 296                   | 447.1                 |
| Metal products                           | 117   | 71    | 101  | 55.6 | 41.1                  | 38.9                  |
| Petroleum products                       | 212   | 86.7  | 92.1 | 40.5 | 38.7                  | 27.3                  |
| Fertilizers                              | 75.2  | 132.8 | 74.5 | 54.9 | 39.8                  | 90                    |

**Table 2.4.** Cargo volumes (by nomenclature), transported in cross-border traffic HU/SK: downstream

| Year, thousand tonnes<br>Commodity group | 2020  | 2021  | 2022  | 2023  | 2023<br>$Q_1+Q_2+Q_3$ | 2024<br>$Q_1+Q_2+Q_3$ |
|--|-------|-------|-------|-------|-----------------------|-----------------------|
| Fertilizers                              | 505.0 | 464.5 | 444.9 | 417.5 | 330.3                 | 289.0                 |
| Petroleum products                       | 578.0 | 870.0 | 642.0 | 653.0 | 500.3                 | 552.0                 |
| Metal products                           | 96.5  | 140.0 | 173.0 | 155.0 | 133.7                 | 119.2                 |

## Transport on the Middle Danube

(statistics of the Mohács checkpoint) – cross-border traffic Hungary/Croatia/Serbia (HU/HR/RS)

### Transport volumes

The volume of registered cargo transported through the Mohács checkpoint in first nine months of 2024 was 2,991 thousand tonnes (Figure 7), or 141.8 % of the volume of cargo transported in 2023, of which upstream transit was 1,401 thousand tonnes, *i.e.*, 46.8 %.

2,547 thousand tonnes of dry cargo were transported, of which:

- upstream – 623 thousand tonnes;
- downstream – 1,924 thousand tonnes.

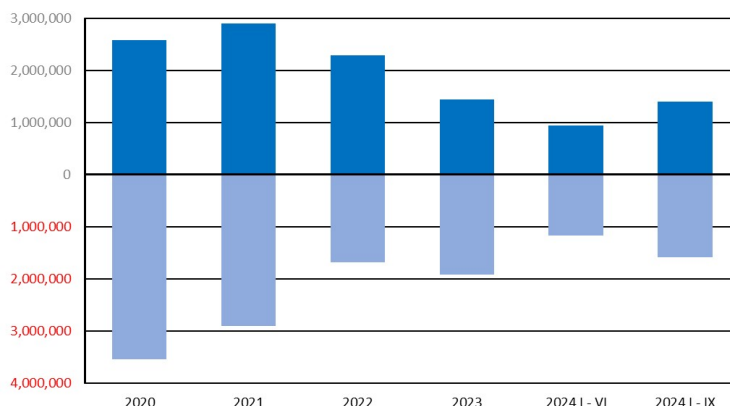
444.3 thousand tonnes of bulk cargo were transported, including:

- upstream – 174.7 thousand tonnes;
- downstream – 269.6 thousand tonnes.

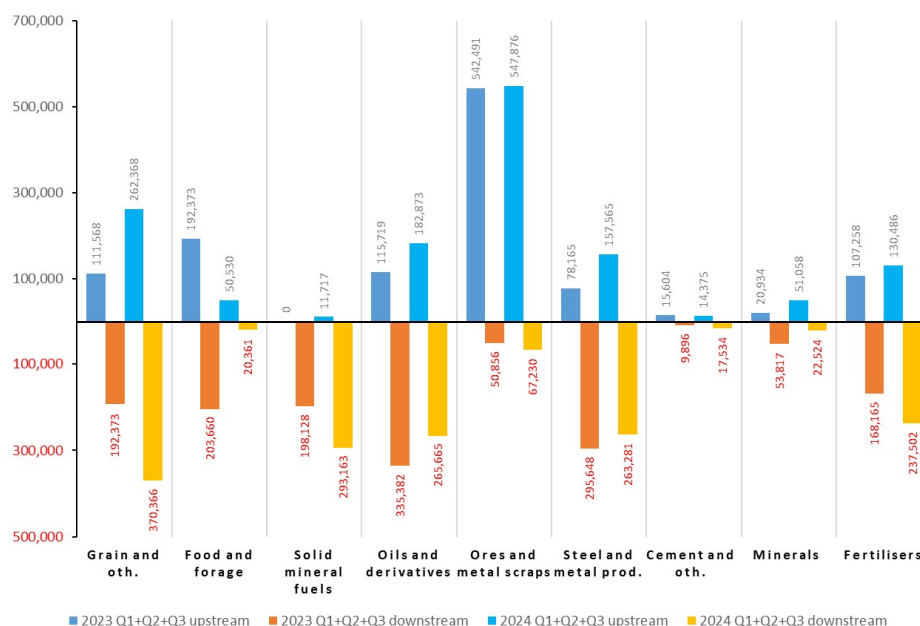
### Nomenclature of goods in transit at a given monitoring section (statistics of the Mohács checkpoint)

The market characteristics in Q<sub>1</sub>+ Q<sub>2</sub>+ Q<sub>3</sub> 2024 in this transport section (Figure 8) compared to the corresponding 2023 figures are as follows:

- continuing relatively low volumes of upstream transport of iron ore raw materials and a sharp decline in downstream transport of food commodities;
- maintaining the minimum for the last three years volumes of coal transport upstream;
- significant growth of grain cargo and fertilizer transport volumes downstream;
- stabilization of downstream and upstream transport volumes of steel products and oil products, as well as upstream/downstream growth of fertilizer transport volumes.



**Figure 7.** Cargo transport volumes upstream/downstream the Danube River through Mohács by year, in tonnes



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

The absolute ratio of the main cargo volumes in upstream and downstream traffic (cross-border traffic Hungary/Croatia/Serbia (HU/HR/RS)) is presented in Tables 2.5 and 2.6.

**Table 2.5.** Cargo volumes (by nomenclature), transported in cross-border traffic HU/HR/RS: upstream

| Year, thousand tonnes<br>Commodity group | 2020  | 2021  | 2022  | 2023  | 2023<br>Q1+Q2+Q3 | 2024<br>Q1+Q2+Q3 |
|--|-------|-------|-------|-------|------------------|------------------|
| Iron ore                                 | 954.0 | 991.0 | 741.0 | 692.0 | 542.0            | 548.0            |
| Coal (coke)                              | 323.0 | 281.0 | 200.0 | 2.2   | 0.0              | 11.7             |
| Fertilizers                              | 436.0 | 385.0 | 255.6 | 121.0 | 107.3            | 130.5            |
| Petroleum products                       | 106.0 | 117.0 | 252.0 | 153.7 | 115.7            | 182.4            |
| Metal products                           | 243.0 | 249.0 | 205.0 | 111.1 | 78.2             | 157.6            |

**Table 2.6.** Cargo volumes (by nomenclature), transported in cross-border traffic  
HU/HR/RS: downstream

| <b>Year, thousand tonnes</b><br><b>Commodity group</b> | <b>2020</b> | <b>2021</b> | <b>2022</b> | <b>2023</b> | <b>2023</b><br><b>Q<sub>1</sub>+Q<sub>2</sub>+Q<sub>3</sub></b> | <b>2024</b><br><b>Q<sub>1</sub>+Q<sub>2</sub>+Q<sub>3</sub></b> |
|--|-------------|-------------|-------------|-------------|---|---|
| Grain  | 1,471       | 1,002       | 238.9       | 317.4       | 192.4   | 370.4   |
| Petroleum products                                     | 528.0       | 591.0       | 322.3       | 405.4       | 335.2   | 265.7   |
| Metal products   | 295.0       | 254.0       | 310.0       | 381.0       | 295.6   | 263.3   |
| Food products and animal feed                          | 520.0       | 218.5       | 65.0        | 216.4       | 203.7   | 20.3  |
| Fertilizers  | 364.0       | 316.0       | 315.5       | 185.7       | 168.2   | 237.5   |

### 2.2.3 Inter-basin transport

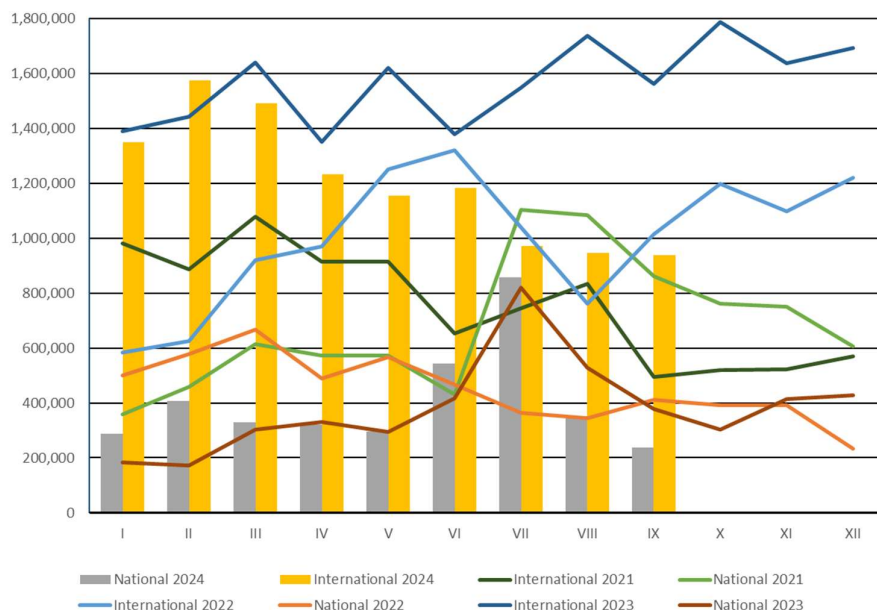
#### Transport on the Danube-Black Sea Canal

The volume of transport through the Danube-Black Sea Canal amounted to 14. 48 million tonnes<sup>3</sup> , which is 84.7% of the same figure for 2023, of which:

- international transport: 10.85 mln. tonnes (79.4% vs. 2023);
- domestic transport: 3.63 mln. tonnes (105.8% vs. 2023).

Transport volumes by month along the Danube-Black Sea channel are shown in Figure 9.

<sup>3</sup> [www.acn.ro](http://www.acn.ro)



**Figure 9.** Cargo transport volume upstream/downstream through the Cernavoda-Constanta Canal by month, in tonnes

### 3 Overview of cargo turnover in the Danube ports

The cargo turnover in the Danube ports for 9 months (Q<sub>1</sub>+ Q<sub>2</sub>+ Q<sub>3</sub>) of 2024 compared to the same indicators in 2023 varied differently (Table 3.1).

**Table 3.1.** Cargo turnover of ports in the Danube countries in 2020-2024

| Ports<br>(thousand<br>tonnes) | 2020   | 2021   | 2022   | 2023   | 2023<br>Q <sub>1</sub> +Q <sub>2</sub> +Q <sub>3</sub> | 2024<br>Q <sub>1</sub> +Q <sub>2</sub> +Q <sub>3</sub> |
|-------------------------------|--------|--------|--------|--------|--|--|
| Germany                       | 3,511  | 2,999  | 2,410  | 2,228  | 1,712  | 1,865*   |
| Austria                       | 6,050  | 6,356  | 5,363  | 4,460  | 3,766  | 3,102  |
| Slovakia                      | 1,553  | 1,846  | 1,934  | 1,509  | 1,214*   | 1,1037**   |
| Hungary                       | 6,742  | 5,715  | 4,063  | 3,604  | 2,748  | 3,071  |
| Croatia                       | 948    | 697    | 582    | 365.5  | 273.3  | 257.8  |
| Serbia                        | 8.164  | 13.610 | 12.023 | 12.031 | 9.330  | 9.516  |
| Bulgaria                      | 5.431  | 7.111  | 7.104  | 7.026  | 5.518  | 5.395 ***  |
| Romania                       | 27.307 | 28.457 | 24.355 | 28.857 | 21.097   | 18.826   |
| Republic of<br>Moldova        | 1.185  | 1.819  | 2.144  | 2.144  | 1.954  | 1.915***   |
| Ukraine                       | 4.055  | 5.505  | 16.505 | 32.021 | 24.705   | 14.181***  |

\* January-August, total cargo turnover on the Bavarian section of the waterway

\*\* Bratislava and Komarno ports

\*\*\* Data obtained from the maritime administrations of Bulgaria, the Republic of Moldova and Ukraine



Cargo turnover of the Port of Constanța, by river vessels, amounted to 13,597 thousand tonnes.

Separately, it should be noted that in spite of a significant overall decrease in the volume of cargo handled in the Lower Danube ports, as well as a significant decrease in the freight rates for the transport of grain from the Lower Danube ports, the Danube ports of Ukraine (Tables 3.2 - 3.4) have generally maintained stable market positions, which is an indicator of the effectiveness of the decisive measures taken by the Government of Ukraine, with the support of the European Union and the Danube Commission, to organise the export of agricultural and other products through the ports of Reni, Izmail and Ust-Dunaisk.

**Table 3.2.** Cargo turnover of the Danube ports of Ukraine in 2024 (thousand tonnes)\*

| Port/period  | Izmail | Reni  | Ust-Dunaisk |
|--|--------|-------|-------------|
| (Q <sub>1</sub> +Q <sub>2</sub> +Q <sub>3</sub> ) 2023 | 15,299 | 7,986 | 1,419       |
| (Q <sub>1</sub> +Q <sub>2</sub> +Q <sub>3</sub> ) 2024 | 10,728 | 3,020 | 433         |

\* Data obtained from the Administration of Sea Ports of Ukraine

**Table 3.3.** Cargo turnover of the Danube ports of Ukraine in export in 2024 (thousand tonnes)

| Port/period<br>Q <sub>1</sub> +Q <sub>2</sub> +Q <sub>3</sub> 2024 | Izmail                 | Reni                   | Ust-Dunaisk        |
|--|------------------------|------------------------|--------------------|
| Grain  | 7,274.94<br>(7,182.75) | 1,040.77<br>(4,314.21) | 175.30<br>(713.06) |
| Other dry bulk cargo   | 786.21<br>(1,717.29)   | 454.56<br>(1,276.45)   | 78,0<br>(454.23)   |
| Liquid bulk cargo (oil)  | 509,70<br>(1,302.00)   | 393.90<br>(840.52)     | 11.20<br>(0)       |

\* In parentheses are data on cargo turnover for the first nine months of Q<sub>1</sub>+Q<sub>2</sub>+Q<sub>3</sub> 2023

The volumes of the main components of Ukrainian ports' cargo turnover in 2022-2024 are shown in Table 3.4.

**Table 3.4.** Main components of cargo turnover of Ukrainian ports in 2022-2024 (thousand tonnes)

| Period/year<br>(Q <sub>1</sub> +Q <sub>2</sub> +Q <sub>3</sub> ) | Grain     | Other dry bulk cargo | Liquid bulk cargo (oil) |
|--|-----------|----------------------|-------------------------|
| 2022   | 4,113.72  | 2,390.21             | 714.55                  |
| 2023   | 12,353.10 | 3,499.42             | 2,173.18                |
| 2024   | 5,571.49  | 1,393.40             | 938.33                  |

## 4 Conclusions

During the first 9 months of 2024 and in the following months, the impact of full-scale Russian aggression in Ukraine continued to pose real threats to the security of shipping on the Lower Danube. The ongoing attacks on the infrastructure of Ukraine's Danube ports pose significant risks to the Danube shipping market, which has affected almost all major market sectors and their trends in 2024.

Despite relatively favorable navigational conditions during the first 9 months of 2024, there are changes in the absolute values and relative ratios of the nomenclature of cargo in Danube transport as well as in passenger traffic.

The Danube Commission continues to work on special coordination activities within the *Danube Solidarity Lanes EU-Ukraine* initiative adopted in May 2022.

The role and importance of the *Danube Solidarity Lanes EU-Ukraine* initiative has not changed, despite the increased activity of the *Ukrainian Grain Corridor*, established in the fall of 2023 on the basis of the ports of Odessa, Pivdennyi and Chernomorsk (ports of Greater Odessa).

In the third quarter of 2024, about 75% of Ukrainian grain exports were carried out through the ports of Greater Odessa.

About 500 000 tonnes of grain were exported on a monthly basis in the third quarter of 2024 via the Danube ports of Ukraine. Ukraine's Danube ports also saw an increase in the transshipment of other cargoes, such as iron ore and metal products (exports) and liquid bulk fuel (imports).

The development of the Danube Commission's activity within the *Danube Solidarity Lanes EU-Ukraine* initiative is considered in the following directions:

- continuous monitoring and improvement of administrative procedures to enhance the efficiency of cross-border freight flow logistics in the region;
- ensuring the sustainability and permanent readiness of Danube navigation as a reserve route to support traffic to/from Ukrainian ports, as well as the stabilization of the Danube-Black Sea channel connections;
- developing a position on preparing Danube navigation for the transport of cargoes necessary for the restoration and reconstruction of Ukraine's energy and transport infrastructure.

The Danube Commission's short-term priority actions within the *Danube Solidarity Lanes EU-Ukraine* initiative to ensure navigation safety are coordinated with the administrations of Ukraine, Romania and Moldova, the DC Member States and the European Commission.