# MARKET OBSERVATION FOR DANUBE NAVIGATION: RESULTS IN 2025

DANUBE COMMISSION
BUDAPEST – 2026

Donaukommission
Commission du Danube
Дунайская Комиссия

Funded by
the European Union

# Market Observation for Danube Navigation: Results in 2025

**Budapest - 2026**

**HU ISSN 3004-0086 (electronic version)**

**The Danube Commission, Budapest 1068, Benczúr utca 25**

Pyotr Semyonovich Suvorov – responsible for compilation and publication

Oana Florescu – responsible for editing

**The activity was funded by European Union CEF funds under Subvention Agreement No.: Nr. 101127323 – 22 – HU – TG – GRANT 3 – Danube**

# Table of Contents

# 1 Initial State and Dynamics of the Danube Transport Market

## 1.1 Initial state of the market

The initial state of the transport market in Danube shipping at the beginning of 2025 was determined by the dynamics and results of the 2024 market, as well as forecasts for its main components for 2025. According to the EUROFER (European Steel Industry Trade Association) forecast (July 2025), in the metallurgical industry of the European Union countries and the Eurozone, as well as in the Danube and adjacent basins (Rhine-Main-Danube system, Black Sea basin), an absence of production growth in its main sectors was assumed. At the same time, the USDA (United States Department of Agriculture) forecast (July 2025) indicated an increase in the main indicators of the agricultural sector and an increase in transport activity in the current market period, including water transport.

The determining factor of the dynamics and final indicators of the market in Danube shipping remained, as before, the critical situation in the Lower Danube region, which arose as a result of the full-scale aggression of Russia against Ukraine. During 2025, Russia intensified systematic attacks on Ukraine's Danube port infrastructure and port-adjacent regions.

Starting from January, when the first attack on the region of the Port of Izmail occurred, and subsequently on an almost monthly basis, Russia has carried out air strikes on the Ukraine's Danube port infrastructure and adjacent facilities. As a result of these attacks, transshipment facilities, energy and transport infrastructure, grain hangars, storage premises, and administrative buildings were destroyed. Vessels flying the flags of various countries and engaged in cargo operations were also damaged.

Strikes were also carried out against other civilian objects, creating a direct threat to the lives of the civilian population. On 23 July 2025, a mine explosion occurred on the dredger "Ingulsky," which was performing maintenance work to ensure shipping conditions on the Kiliya mouth channel. As a result, three crew members died and eight were injured. On 17 November 2025, in the Port of Izmail, the LPG-tanker "ORINDA" (flag of Türkiye) was hit, resulting in the ignition of its cargo (gas).

Significant damage was also caused to the ecosystem of the Lower Danube:

- air and soil pollution in the Danube Delta caused by fires resulting from explosions, as well as the burning of petroleum products, liquefied gas, and grain;
- pollution of the water area as a result of spills of petroleum products, sunflower oil, and combustion products;
- pollution of the Danube Delta by petroleum products following the accident in the Black Sea involving the Russian tankers "Volgoneft-212" and "Volgoneft-239".

It should be noted that the air and mine attacks carried out by Russia have created conditions of direct threat not only for the Danube port infrastructure of Ukraine, but also for the entire system of vessel movement on the Lower Danube, including the safety of vessel crews. As a result, the Danube transport market has faced serious problems, primarily related to ensuring navigation safety and managing increased risks. This

situation has led to a partial reorientation of the market and distortions in individual sectors of traditional transport along the Danube River. At the same time, despite regular shelling, Ukrainian Danube ports continue, to the greatest extent possible, to maintain their core operations. In the structure of their cargo turnover, exports are oriented primarily toward food cargoes, thereby making a significant contribution to ensuring global food security.

In the conditions prevailing in 2025, the Danube Commission continued its active efforts to comprehensively support the export of primarily Ukrainian agricultural products, as well as the import of goods essential for Ukraine, within the framework of the Danube Solidarity Lanes EU-Ukraine Initiative, adopted in May 2022 in support of the European Union's solidarity measures for Ukraine. The main goal of the Initiative was to stabilize logistics schemes for cargo transport using the Danube ports of Ukraine, the Republic of Moldova, and Romania, as well as the "Danube - Black Sea" Canal routes. The role and significance of the Danube Solidarity Lanes EU-Ukraine Initiative significantly increased following the termination of the Ukrainian Grain Corridor, which had previously relied on the ports of Odesa, Pivdennyi, and Chornomorsk (the ports of Greater Odesa) for the export of agricultural products. In the current context, the Initiative is aimed not only at supporting existing logistics schemes, but also at developing new ones for the export of Ukrainian agricultural products via the Danube ports of Ukraine, as well as ensuring the stability and operational readiness of Danube shipping as an alternative route for the transport of goods and for the reconstruction of Ukraine’s transport and energy infrastructure.

## 1.2 Dynamics of the transport market

### *1.2.1 Dynamics of the freight transport market*

The dynamics of the freight transport market on the Danube in 2025 were determined by the negative influence of threats to navigation safety caused by the Russian aggression against Ukraine, the current state of the industrial and agricultural sectors of the economy in the Danube region and adjacent basins, and the prevailing navigational conditions.

Cargo transport volumes in the first half of the year ($Q_1+Q_2$) and for 9 months ($Q_1+Q_2+Q_3$) 2025, according to data from the main market dynamics checkpoints, amounted to:

- cargo transport volumes through the Jochenstein lock[1] (Germany/Austria cross-border traffic) in the first half of the year ($Q_1+Q_2$) 2025 amounted to 1,158 thousand tonnes (78% of the volumes for ($Q_1+Q_2$) 2024); for 9 months ($Q_1+Q_2+Q_3$) 2025 – 1,668 thousand tonnes, equivalent to 81% of the volume in ($Q_1+Q_2+Q_3$) 2024;
- cargo transport volumes through the Gabčíkovo lock[2] (Hungary/Slovakia cross-border traffic) in ($Q_1+Q_2$) 2025 amounted to 2,108 thousand tonnes (89% of the volumes for ($Q_1+Q_2$) 2024); for 9 months ($Q_1+Q_2+Q_3$) 2025 – over 3,188 thousand tonnes, equivalent to 92% of the volume for ($Q_1+Q_2+Q_3$) 2024;

[1] *Source: Generaldirektion Wasserstraßen und Schifffahrt*
[2] *Source: Slovenský Vodohospodársky Podnik*

- cargo transport volumes through the Mohács checkpoint[3] (Hungary/Croatia/Serbia cross-border traffic) in ($Q_1$+$Q_2$) 2025 amounted to 1,961 thousand tonnes (93% of the volumes for ($Q_1$+$Q_2$) 2024); for 9 months ($Q_1$+$Q_2$+$Q_3$) 2025 – 2,828 thousand tonnes, equivalent to 95% of the volume for (Q1+Q2+Q3) 2024;
- transport volumes via the Danube-Black Sea Canal[4] in ($Q_1$+$Q_2$) 2025 amounted to 6,899 thousand tonnes (68% of the volumes for ($Q_1$+$Q_2$)2024); for 9 months ($Q_1$+$Q_2$+$Q_3$) 2025 – 11,121 thousand tonnes[1], equivalent to 77% of the volume for ($Q_1$+$Q_2$+$Q_3$) 2024, of which:
  - international transport accounted for 6,892 thousand tonnes (64% compared to the 2024 indicator);
  - domestic transport accounted for 4,229 thousand tonnes (116% compared to the 2024 indicator).

### *1.2.2 Dynamics of port cargo turnover*

Cargo turnover at Danube ports in the first nine months of the year showed mixed (divergent) trends (Table 1.1).

***Table 1.1.*** Cargo turnover of the Danube ports from 2021 to 2025$_{Q1+Q2+Q3}$ (thousand tonnes)

| **Country/ period** | **2021** | **2022** | **2023** | **2024** | **2024** $Q_1$+$Q_2$+$Q_3$ | **2025** $Q_1$+$Q_2$+$Q_3$ |
|---|---|---|---|---|---|---|
| Germany | 2,999 | 2,410 | 2,228 | 2,047 | 1,578 | 1,714 |
| Austria | 6,356 | 5,363 | 5,123 | 5,349 | 3,102 | 3,587 |
| Slovakia* | 1,846 | 1,934 | 1,509 | 1,473 | 1,103 | 1,249 |
| Hungary | 5,715 | 4,063 | 3,604 | 4,019 | 3,071 | 2,960 |
| Croatia** | 697 | 582 | 364 | 392 | 258 | 215 |
| Serbia** | 13,610 | 12,023 | 12,031 | 12,816 | 9,516 | 9,374 |
| Bulgaria | 7,111 | 7,104 | 7,026 | 7,520 | 5,395 | 4,625 |
| Romania | 28,457 | 24,355 | 28,857 | 23,759 | 18,826 | 14,807 |
| Republic of Moldova | 1,819 | 2,144 | 2,668 | 2,579 | 1,915 | 1,849 |
| Ukraine | 5,505 | 16,505 | 32,021 | 17,396 | 14,181 | 6,773 |

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

Cargo turnover of the main Ukrainian Danube ports (total and exports) is presented in Tables 1.2–1.3.

[3] *Source: Mohácsi Városgazdálkodási és Révhajózási NKft.*
[4] *Source: www.acn.ro*

***Table 1.2.*** Cargo turnover* of Ukrainian Danube ports in 2025$_{Q1+Q2+Q3}$ (thousand tonnes)

| Period/port | Izmail | Reni | Ust-Dunaisk |
|---|---|---|---|
| 2024 | 13,448 | 3,431 | 517 |
| ($Q_{1+2+3}$) 2024 | 10,728 | 3,020 | 433 |
| ($Q_{1+2+3}$) 2025 | 5,777 | 839 | 157 |

**The volumes presented in this table include cargo transported by both river and sea vessels*

***Table 1.3.*** Cargo turnover* of Ukrainian Danube ports in export in 2025$_{Q1+Q2+Q3}$ (thousand tonnes)

| Type of good/port | Izmail | Reni | Ust-Dunaisk |
|---|---|---|---|
| Grain | 903 (4,275**) | 67(1,041) | 3 (175) |
| Other bulk goods | 598 (786) | 42 (455) | 17 (78) |
| Oil (bulk) | 100 (509) | 18 (394) | 0(11) |

**The volumes presented in this table include cargo transported by both river and sea vessels.*
***Indicators for the corresponding period of 2024 are given in brackets for comparison*

The dynamics of the total cargo turnover of Ukraine's Danube ports, as well as their export cargo turnover, clearly reflect the consequences of Russian attacks on the port infrastructure. At the same time, under the prevailing conditions, Ukraine's Danube ports demonstrate a commitment to maximum possible recovery of their activity and cargo turnover dynamics.

### *1.2.3 Dynamics of passenger transport*

On the Upper Danube (Gabčíkovo lock statistics), relatively stable passenger transport on cabin cruise vessels began in April; in total, in ($Q_1$+$Q_2$), 1,778 vessel transits (upstream/downstream) were registered and 259 thousand passengers were transported (124% of the 2024 volume); in the third quarter, there was a significant increase in passenger traffic (Table 1.4).

On the Middle Danube in January–March 2025, according to official statistics from the Mohács checkpoint, there was insignificant movement of passenger vessels. In the third quarter, according to official data, a total of only about 1.5 thousand passengers were transported through the Mohács checkpoint (Table 1.4).

***Table 1.4.*** Passenger transport volumes (in thousand passengers)

| Section/Year | 2021 | 2022 | 2023 | 2024 | 2024 ($Q_1$+$Q_2$+$Q_3$) | 2025 ($Q_1$+$Q_2$+$Q_3$) |
|---|---|---|---|---|---|---|
| Upper Danube (Gabčíkovo lock) | 149 | 469 | 562 | 610 | 449 | 547 |
| Middle Danube (Mohács checkpoint) | 34 | 74 | 29 | 9 | 8 | 1.5 |

# 2 Observation of the Danube Shipping Market: 2025 Results, Fleet and Cargo Movement

## 2.1 Navigation conditions on the Danube in 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 (Figure 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 (Figure 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 (Figure 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 (Figure 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 (Figure 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 (Figure 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 (Figure 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 (Figure 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 the 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 (Figure 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 lowest monthly 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 a sharp decline in levels below the LNWL was observed on the Lower Danube at the end of June.

**In April**, minimum, average (MWL), and maximum water levels on the Upper Danube (Figure 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 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 (Figure 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 even reach 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 (Figure 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 2024. 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 (Figure 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 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 (Figure 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 (Figure 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 (Figure 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 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 (Figure 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 minimum levels in June 2024. Lowest levels were observed in the second half of the final third of the month.

On the Lower Danube (Figure 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 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.

**In the third quarter of 2025**, water levels on certain sections of the Danube River, with the exception of the Middle Danube, systematically dropped below the LNWL (Low Navigable Water Level). On the Upper Danube, water levels fell below the LNWL during the first half of July and again in mid-August. On the Lower Danube, water levels dropped below the LNWL throughout the entire quarter, except for the second ten-day period of August.

**In July**, on the Upper Danube (Figure 1), minimum and average water levels were 100 cm lower than the corresponding values in July 2024, while the maximum water level was 10 cm higher than the corresponding value in July 2024. Maximum levels were observed at the end of the month. Minimum levels were observed during the first ten-day period of the month. During the first half of July, water levels reached or dropped below the LNWL for 15 days.

On the Middle Danube (Figure 2), minimum water levels were 130 cm lower than the corresponding values in July 2024, average levels were 110 cm lower, and maximum levels were 90 cm higher than the corresponding values in July 2024. Maximum levels were observed at the end of the month. Minimum levels were observed at the beginning of the month; during this period, water levels reached or dropped below the LNWL for 5 days.

On the Lower Danube (Figures 3 and 4), minimum water levels were 180–210 cm lower than the corresponding values in July 2024, average levels were 230–260 cm lower, and maximum levels were 260–340 cm lower. Maximum levels were observed at the end of the second ten-day period of the month; however, they did not even reach minimum water levels recorded in July 2024. Minimum levels were observed in the second half of the first and the first half of the second ten-day period of the month; during this time, water levels reached or dropped below the LNWL for 28 days at Novo Selo and 31 days at Silistra.

**In August**, on the Upper Danube (Figure 1), minimum water levels were 40 cm lower than the corresponding values in August 2024, average levels were 30 cm lower, while maximum levels corresponded to those recorded in 2024. Maximum levels were observed at the beginning of the month. Minimum levels were observed in the second half of the second and the first half of the third ten-day period of the month; during this time, water levels reached or dropped below the LNWL for 15 days.

On the Middle Danube (Figure 2), minimum water levels were 20 cm lower than the corresponding values in August 2024. Average water levels were 20 cm higher, and

maximum levels were 170 cm higher than the corresponding values in August 2024. Maximum levels were observed at the beginning of the month. Minimum levels were observed at the end of the second and at the beginning of the third ten-day period of the month.

On the Lower Danube (Figures 3 and 4), minimum water levels were 30–40 cm lower than the corresponding values in August 2024, average levels were 10 cm lower, while maximum levels were 30–70 cm higher than the corresponding values in August 2024. Maximum levels were observed during the second half of the first and the first half of the second ten-day period of the month. Minimum levels were observed at the end of the month; during this time, water levels reached or dropped below the LNWL for 15 days at Novo Selo and 19 days at Silistra.

**In September**, on the Upper Danube (Figure 1), minimum water levels were 40 cm lower than the corresponding values in September 2024, average levels were 90 cm lower, and maximum levels were 150 cm lower. Maximum levels were observed in the second half of the third ten-day period of the month. Minimum levels were observed in the first half of the third ten-day period; during this time, water levels reached or dropped below the LNWL for 10 days.

On the Middle Danube (Figure 2), minimum water levels were 30 cm lower than the corresponding values in September 2024, average levels were 250 cm lower, and maximum levels were 654 cm lower. Maximum levels were observed at the beginning of the month. Minimum levels were observed in the first half of the third ten-day period of the month; during this time, water levels reached or dropped below the LNWL for 2 days.

On the Lower Danube (Figures 3 and 4), minimum water levels were 10 cm lower than the corresponding values in September 2024, average levels were 90–120 cm lower, and maximum levels were 280–310 cm lower. Maximum levels were observed in the third ten-day period of the month. Minimum levels were observed in the second half of the first and the first half of the second ten-day period of the month; during this time, water levels reached or dropped below the LNWL for 26 days at Novo Selo and 30 days at Silistra.

**In the fourth quarter of 2025**, water levels on certain sections of the Danube fell below the LNWL (Established Low Navigable Water Level) in mid-October and at the end of December.

**In October**, on the Upper Danube (Figure 1), minimum water levels were 60 cm lower than the corresponding figures in October 2024, average levels were 90 cm lower, and maximum levels were 60 cm lower. Minimum levels were observed in the middle of the month, during which they reached or were below the LNWL value for 10 days. Maximum levels were observed at the end of the month.

On the Middle Danube (Figure 2), minimum water levels were 120 cm lower than in October 2024, averages were 190 cm lower, and maximums were 200 cm lower. Maximum levels were observed during the first half of the second third (ten-day period) of the month. Minimum levels were observed at the beginning of the final third, reaching or falling below the LNWL value for 6 days.

On the Lower Danube (Figure 3, 4), minimum water levels were 190–240 cm lower than in October 2024, averages were 320–330 cm lower, and maximums were 330–370 cm

lower. Maximum levels were observed in the middle of the second third. Minimum levels were observed at the beginning and end of the month, reaching or falling below the LNWL value for 28 days (Novo Selo) and 31 days (Silistra).

**In November**, on the Upper Danube (Figure 1), minimum water levels were 10 cm lower than in November 2024, averages reached last year's levels, and maximums were 20 cm lower than in November 2024. Maximum levels occurred in the middle of the first third. Minimum levels occurred at the beginning of the final third of the month.

On the Middle Danube (Figure 2), minimum levels were 20 cm lower than in November 2024. Average water levels reached the values of November 2024, and maximums were 30 cm higher. Maximum levels were observed at the end of the month. Minimum levels were observed in the middle of the final third of the month.

On the Lower Danube (Figure 3, 4), minimum water levels were 10 cm higher than in November 2024 (Novo Selo) and 50 cm lower (Silistra). Average levels were 30 cm higher (Novo Selo) and 20 cm lower (Silistra). Maximum water levels were 100 cm higher than in November 2024 (Novo Selo) and 20 cm lower (Silistra). Maximum levels were observed at the end of the month. Minimum levels were observed in the second half of the second third (Novo Selo) and at the beginning of the month (Silistra). Overall, in November, water levels reached or were below the LNWL for 11 days (Silistra).

**In December**, on the Upper Danube (Figure 1), minimum water levels were 80 cm lower than in December 2024, averages were 60 cm lower, and maximums were 50 cm lower. Maximum levels were observed at the beginning of the second third. Minimum levels were observed at the end of the month, reaching or falling below the LNWL for 6 days.

On the Middle Danube (Figure 2), minimum water levels were 90 cm lower than in December 2024, averages were 50 cm lower, and maximums were 20 cm lower. Maximum levels were observed at the beginning of the second third. Minimum levels were observed at the end of the month, reaching or falling below the LNWL for 9 days.

On the Lower Danube (Figure 3, 4), minimum water levels were 20–90 cm lower than in December 2024. Average levels were 50 cm higher than in December 2024, and maximums were 100–120 cm higher. Maximum levels were observed in the first half of the [first] third. Minimum levels were observed at the end of the month, reaching or falling below the LNWL for 4 days (Novo Selo).

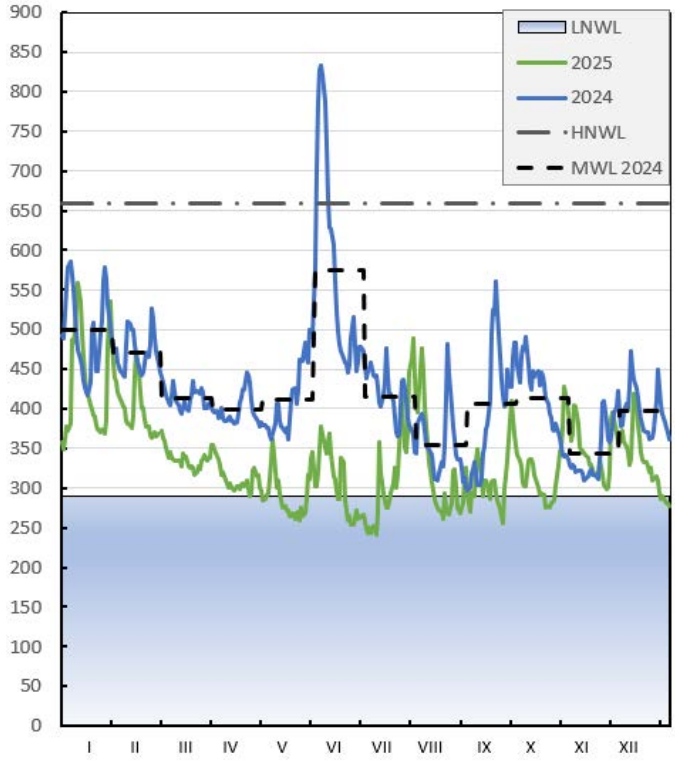


***Figure 1.*** Daily water levels for the Pfelling gauging station (DE), (km 2306+530), in cm

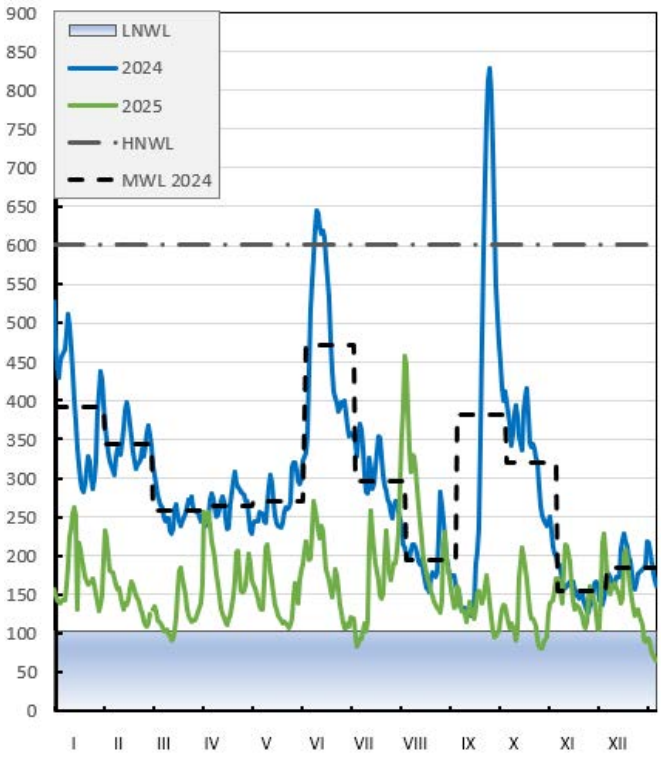


***Figure 2.*** Daily water levels for the Budapest Vigadó station (HU), (km 1646+500), in cm

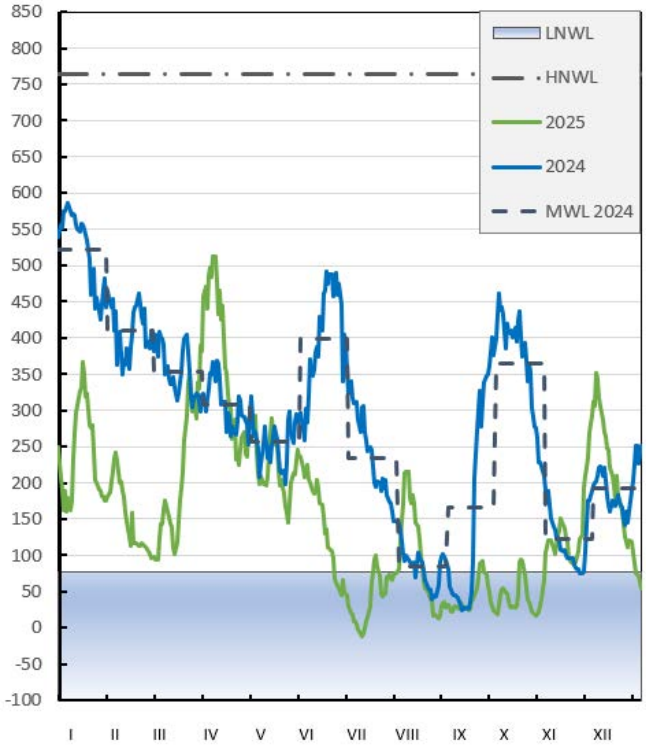


***Figure 3.*** Daily water levels for the Novo Selo gauging station (BG), (km 833+600), in cm

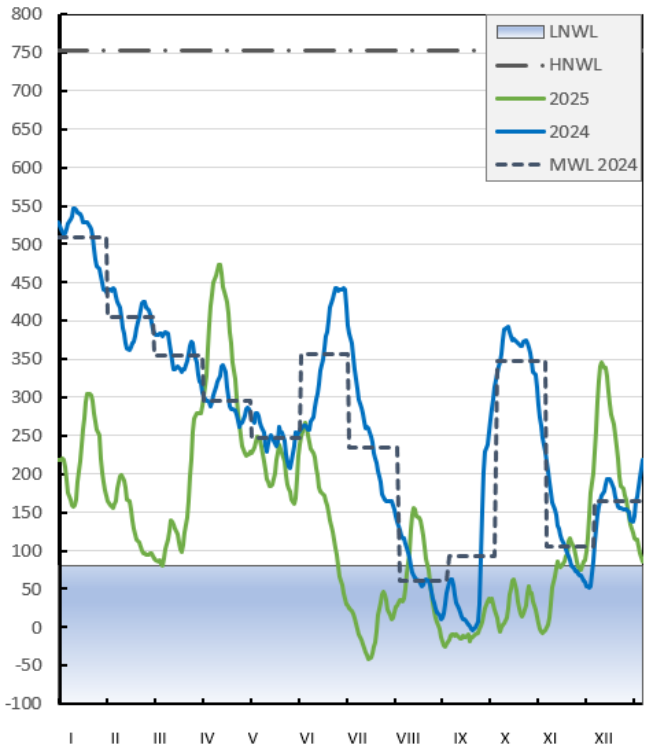


***Figure 4.*** Daily water levels for the Silistra gauging station (BG), (km 375+000), in cm

## 2.2 Water levels and ensuring operational vessel drafts in 2025

Stable water availability, necessary for effective navigation, was maintained only during the first quarter of 2025, which allowed for the loading of vessels to a draft at levels of 2.5-2.7 m when moving upstream (Table 2.1).

In the second quarter of 2025, water levels on the Danube in terms of absolute values of the main indicators (primarily minimum levels) were on average lower than in the second quarter of 2024. On the Lower Danube, a sharp decline in water levels was observed at the end of June and continued thereafter, resulting in a significant reduction in operating drafts (Table 2.1) and temporary suspensions of navigation in certain sections.

In the third quarter of 2025, water levels on certain sections of the Danube, except for the Middle Danube, systematically decreased below the LNWL (RNW) level.

In the fourth quarter of 2025, water levels on the Danube in certain sections decreased below the LNWL level in mid-October and at the end of December.

***Table 2.1.*** Draughts of cargo vessels during the 2025 navigation season (in 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 *) |
| July | 190/180(250*) | 160/180(220/230*) |
| August | 220/230(200*) | 200/210(180*) |
| September | 220/230(250*) | 200/210(230/240*) |
| October | 230/240 (240*) | 200/210 (220/230*) |
| November | 220/230 (230*) | 180/200 (180*) |
| December | 210/220 (230*) | 170/180 (230*) |

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

## 2.3 Observation of fleet movement and cargo flows in 2025

### *2.3.1 Passenger transport*

A relatively stable passenger transport on cruise cabin vessels began in April.

The core of passenger transport on cabin vessels consists of cruises on the Passau - Vienna - Bratislava - Budapest route, voyages from/to the Rhine and Main ports (conventionally referred to as the "Upper Danube," as defined by statistics from the Jochenstein and Gabčíkovo locks), as well as to/from the direction of the Danube Delta (conventionally "Middle Danube," as defined by official statistics from the Mohács checkpoint).

The volumes of passenger transport on these conventional lines in 2025 are presented in Table 2.2.

***Table 2.2.*** Passenger transport volumes (in thousand passengers)

| **Section/ Year** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Upper Danube (Gabčíkovo lock) | 149 | 469 | 562 | 610 | 722 |
| Middle Danube (Mohács checkpoint) | 34 | 74 | 29 | 8.7 | 1.96 |

Through the Jochenstein lock (Austria/Germany cross-border traffic), 389 vessel transits were recorded, representing 98% of the amount in 2024.

For vessels passing through the Gabčíkovo lock (Hungary/Slovakia cross-border traffic, conventionally "Upper Danube") (Figure 5), 4,939 vessel transits were recorded, of which 2,475 were upstream, and 2,464 were downstream (in 2021, total transits – 1,419, in 2022 – 4,040, in 2023 – 4,030, in 2024 – 4,344). In total, 722 thousand passengers were transported in 2025.

The main distribution of passenger transport volumes on the Upper Danube by flag state in 2022-2025 is presented in Table 2.3.

***Table 2.3.*** Distribution of passenger transport volumes on the Upper Danube by vessel flag in % (2022-2025)

| Flag/ Year | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|
| Germany | 17% | 16% | 12% | 14% |
| Bulgaria | 4.2% | 5.1% | 4.2% | 4% |
| Ukraine | 3.9% | 2.9% | 3.2% | 3.8% |
| Countries that are not Member States of DC | 73% | 75% | 76% | 73% |

In total, out of the 4,939 passenger vessel transits through the Gabčíkovo lock in 2025, the following were recorded:

- vessels with a length of 110 m: 1,998 (in 2021 – 676, in 2022 – 1,601, in 2023 – 1,587, in 2024 – 1,650) transits;
- vessels with a length of 135 m: 2,872 (in 2021 – 700, in 2022 – 2,331, in 2023 – 2,354, in 2024 – 2,608) transits, of which 74% were transits of vessels under the flags of countries that are not members of the DC. The average occupancy in June for vessels with a length of:
    - 110 m: 136 passengers (in 2019 – 130);
    - 135 m: 161 passengers (in 2019 – 158).

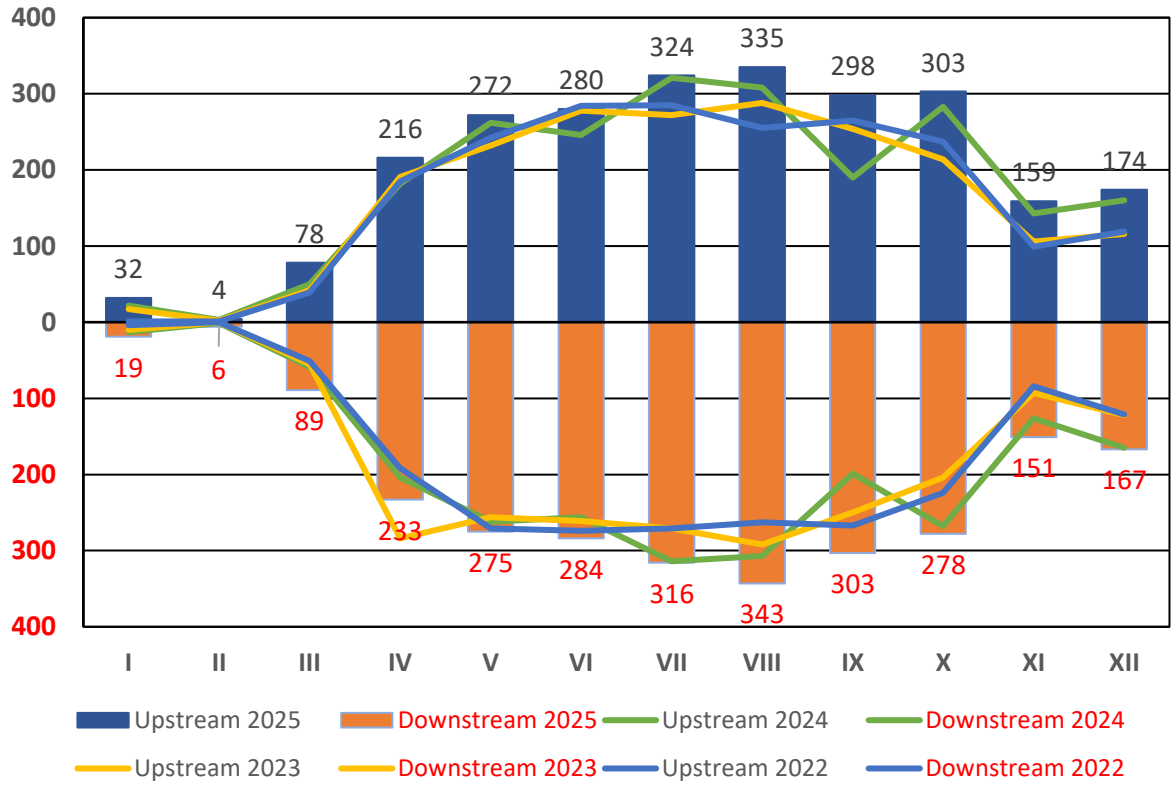


***Figure 5.*** Passages of passenger vessels with cabins upstream/downstream, through the Gabčíkovo lock, by month

On the Middle Danube, according to official data from the Mohács checkpoint, 18 vessel transits were recorded, and a total of 1.96 thousand passengers were transported.

It should be noted that the existing form of using statistics from the Mohács checkpoint will require clarification based on actual data regarding vessel transits and the number of passengers transported, considering the partial change in its status within the market observation system (following Croatia's accession to the Schengen Area in January 2023).

Accordingly, an increase in the number of transits of cabin passenger vessels through the Mohács checkpoint (relative to official statistics) and the Iron Gate 1 (RS) (the Secretariat does not have Statistical data on Iron Gate 2 (RO)) lock on the Middle Danube should be noted.

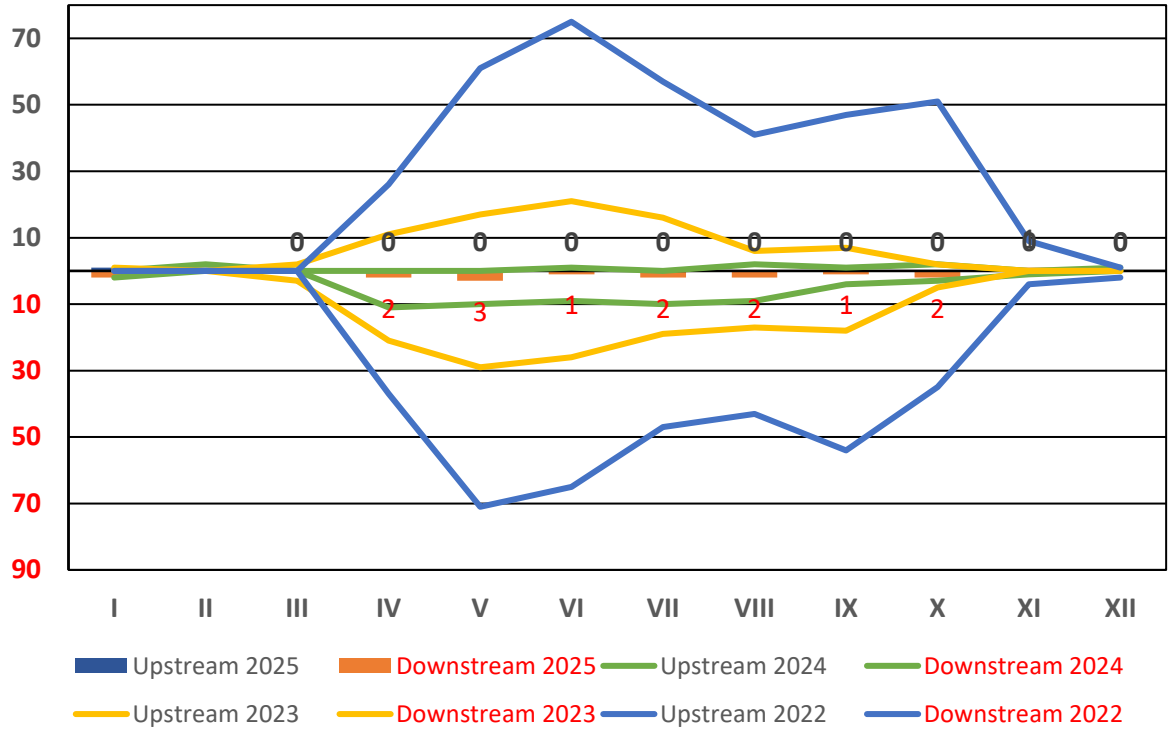


***Figure 6.*** Passages of passenger vessels with cabins upstream/downstream, through the Mohács checkpoint, by month

### 2.3.2 *Freight transport*

Transport volumes

The volume of freight transport through the Jochenstein lock (Germany/Austria cross-border traffic, DE/AT) in 2025 amounted to 2,193 thousand tonnes, which represents 84% of the volume in 2024.

The volume of recorded freight transport through the Gabčíkovo lock (Hungary/Slovakia cross-border traffic) in 2025 amounted to 4,198 thousand tonnes, which represents 92% of the volume in 2024. Upstream transit amounted to approximately 1,656 thousand tonnes, or 39% (in 2021 – 59%, in 2022 – 55%, in 2023 – 52%, in 2024 – 57%) of the total volume (Figure 7).

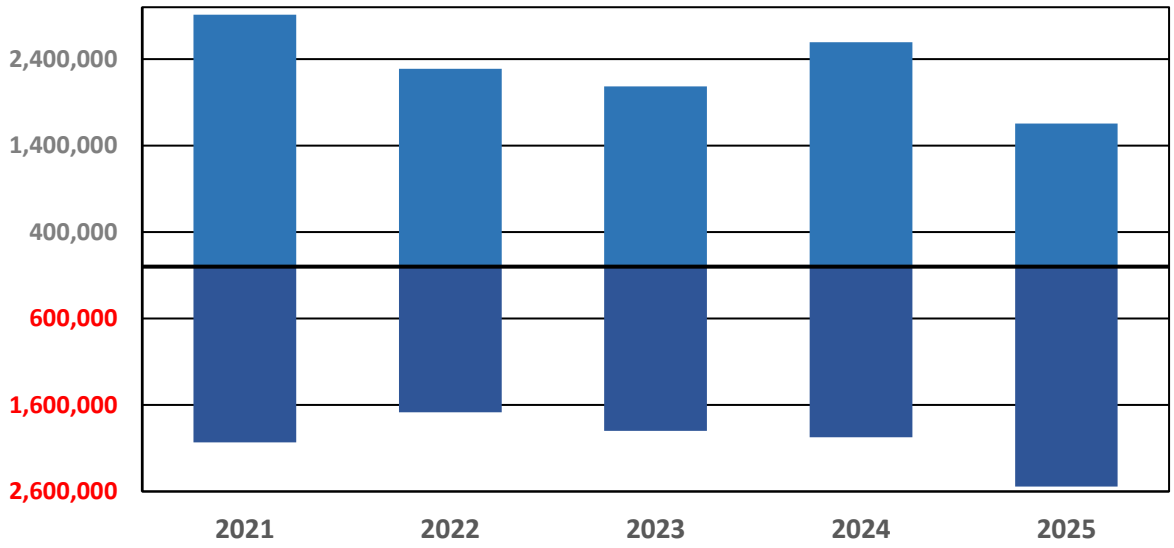


***Figure 7.*** Volumes of cargo transport upstream/downstream, through the Gabčikovo lock, by year, in tonnes

A total of 3,127 thousand tonnes of dry cargo were transported through the Gabčíkovo lock, including:

- upstream: 1,624 thousand tonnes;
- downstream: 1,504 thousand tonnes; i.e., in a ratio of 1.08:1 (in 2021 – 2.4:1, in 2022 – 1.8:1, in 2023 – 1.6:1, in 2024 – 1.9:1).

A total of 1,071 thousand tonnes of liquid cargo were transported, including:

- upstream: 32 thousand tonnes;
- downstream: 1,039 thousand tonnes, i.e., in a ratio of 0.03:1 (in 2021 – 0.1:1, in 2022 – 0.14:1, in 2023 – 0.09:1, in 2024 – 0.12:1).

Transport by non-motorized vessels (Gabčíkovo lock statistics):

In total, 2,008 thousand tonnes were transported by pushed convoys in 2025, which represents approximately 99% of the volume in 2024 and 48% of the total volume of goods passing through the Gabčíkovo lock, including liquid cargo (in 2021 – 50%, in 2022 – 48%, 2023 – 49%, 2024 – 45%).

a) In terms of dry cargo transport volumes, 1,670 thousand tonnes were transported by pushed convoys, of which (Figure 8):

- upstream – 748 thousand tonnes, representing 45% (in 2021 – 50%, in 2022 – 46%, in 2023 – 46%, in 2024 – 44%) of the volume of dry cargo transported upstream;
- downstream – 921 thousand tonnes, representing 36% of the volume of dry cargo transported downstream.

In total, 1,033 non-motorized dry cargo barges passed upstream in pushed convoys (empty + loaded) (in 2021 – 1,250, in 2022 – 1,004, in 2023 – 930, in 2024 – 1,048), of which 30% (in 2021 – 6%, in 2022 – 8%, in 2023 – 14%, in 2024 – 23%) were in ballast. At the same time, out of 1,055 dry cargo barges following downstream in convoys, 8.0% were in ballast (in 2021 – 32%, in 2022 – 17%, in 2023 – 19%, in 2024 – 19%).

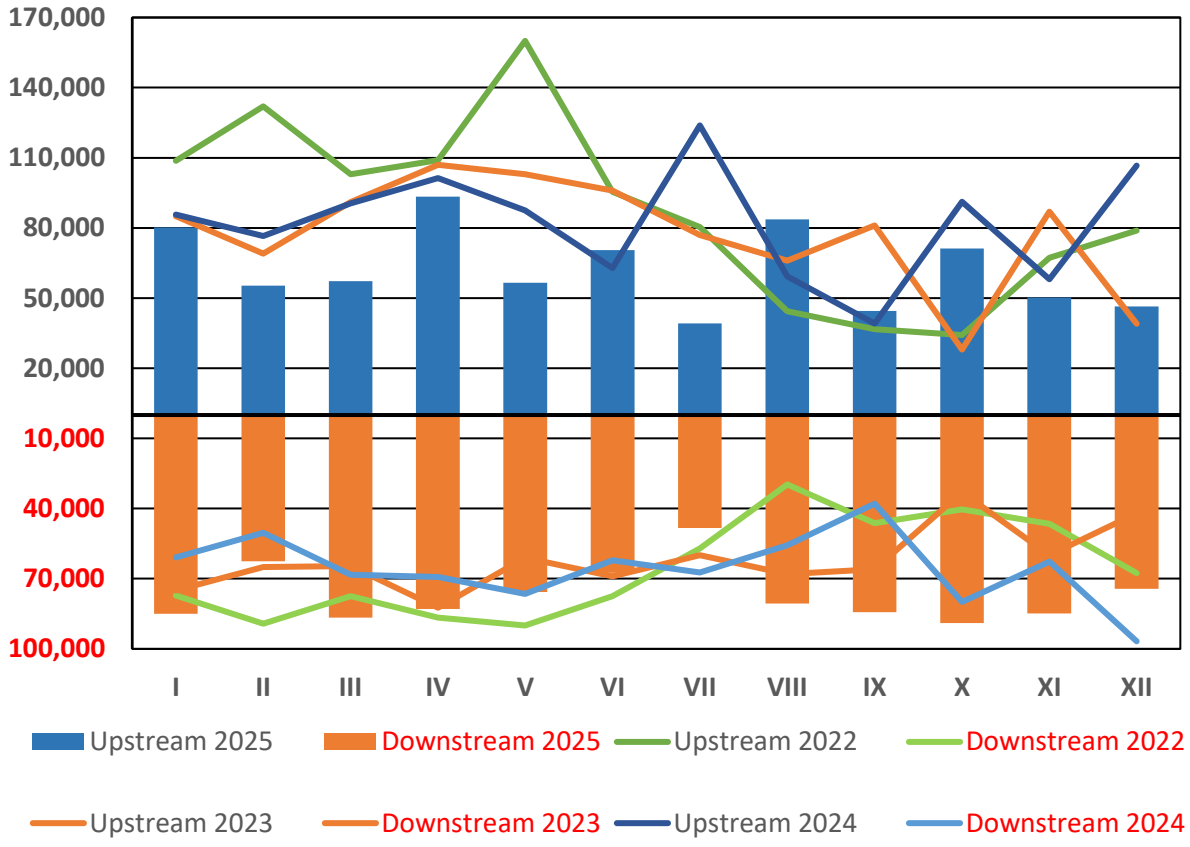


***Figure 8.*** Volumes of cargo transport by non-motorized dry cargo barges upstream/downstream, through the Gabčíkovo lock, by month, in tonnes

b) In terms of liquid cargo transport volumes, 339 thousand tonnes were transported by non-motorized tanker barges within convoys, of which:

- upstream – 16 thousand tonnes;
- downstream – 323 thousand tonnes.

In total, 17 loaded and 327 ballast non-motorized tankers passed upstream in pushed convoys; downstream – 337 loaded and 11 ballast tankers.

Transport by motorized vessels (Gabčíkovo lock statistics):

In total, approximately 2,189 thousand tonnes were transported by motorized vessels in 2025, which represents 52% (in 2021 – 51%, in 2022 – 52%, in 2023 – 52%, in 2024 – 55%) of the total cargo volume and 88% of the volume in 2024.

a) A total of 1,458 thousand tonnes were transported by motorized dry cargo vessels, which amounted to 72% of the volume in 2024, of which:

- upstream – 875 thousand tonnes;
- downstream – 582 thousand tonnes.

In total, 1,244 motorized dry cargo vessels passed upstream in 2025 (empty + loaded) (in 2021 – 1,492, in 2022 – 1,454, in 2023 – 1,217, in 2024 – 1,393), of which 79% were loaded; 1,223 vessels passed downstream (in 2021 – 1,504, in 2022 – 1,597, in 2023 – 1,334, in 2024 – 1,370), of which 60% were loaded.

The movement indicators (ratios) of motorized dry cargo vessels correspond to the data in Table 2.4.a.

***Table 2.4.a.*** Movement indicators of motorized dry cargo vessels on the Upper Danube (Gabčíkovo lock)

| **Variable/year** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Loaded upstream/ downstream | 2.5:1 | 2.0:1 | 1.7:1 | 2.32:1 | 1.4:1 |
| Loaded/empty upstream | 12.0:1 | 8.6:1 | 9.9:1 | 11.0:1 | 3.8:1 |
| Loaded/empty downstream | 0.6:1 | 0.7:1 | 0.9:1 | 0.7:1 | 1.5:1 |

A total of 2,467 motorized dry cargo vessels passed through the Gabčíkovo lock, including:

- vessels with a length of 110 m – 411 loaded units (in 2021 – 330, in 2022 – 289, in 2023 – 343, in 2024 – 271), of which 92 were upstream and 319 downstream; these transported a total of 457 thousand tonnes; and 305 units in ballast;
- vessels with a length of 135 m ("large European vessel") – 111 loaded units (66 upstream), which transported a total of 118 thousand tonnes, and 44 units in ballast;
- specialized vessels ("ro-ro", container vessels, etc.) – 95 vessels in total.

b) A total of 732 thousand tonnes of liquid cargo were transported by motorized tankers, of which: upstream – 16 thousand tonnes; downstream – 715 thousand tonnes. In total, 701 motorized tankers passed upstream in 2025, of which 2.3% were loaded; 697 passed downstream, of which 98% were loaded. Movement ratio indicators for motorized tankers correspond to the data in Table 2.4.b.

***Table 2.4.b.*** Movement indicators of motorized liquid cargo vessels on the Upper Danube (Gabčíkovo lock)

| Variable/year | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Loaded upstream/ downstream | 0.17:1 | 0.18:1 | 0.11:1 | 0.07:1 | 0.02:1 |
| Loaded/empty upstream | 0.18:1 | 0.19:1 | 0.12:1 | 0.08:1 | 0.02:1 |
| Loaded/empty downstream | 9.40:1 | 8.90:1 | 8.60:1 | 17.00:1 | 57.00:1 |

Nomenclature of goods (Gabčíkovo lock statistics):

Market features in 2025 at this transport control section (Figure 9, Tables 2.5 - 2.6) in relation to the corresponding indicators in 2024 consist of:

a) a significant decrease in upstream transport volumes of food and grain cargoes, and iron ore raw materials;
b) an increase in downstream transport volumes of petroleum products (156% of the 2024 volume), fertilizers, and metal products.

It should be noted that upstream transport volumes of mineral raw materials remained stable at 91 thousand tonnes (93.6 thousand tonnes in 2024), as well as significant downstream transport volumes of coal (coke) - 435 thousand tonnes (370 thousand tonnes in 2024) and iron ore raw materials – 237 thousand tonnes (236 thousand tonnes in 2024).

***Table 2.5.*** Cargo volumes at the Upper Danube HU/SK cross-border point (going upstream, thousand tonnes)

| **Commodity group/year** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Food products and animal feed | 879 | 783 | 592 | 890 | 359 |
| Iron ore raw materials | 969 | 735 | 726 | 720 | 576 |
| Grain | 394 | 416 | 427 | 568 | 371 |
| Metal products | 71 | 101 | 56 | 53 | 42 |
| Petroleum products | 87 | 92 | 41 | 35 | 20 |
| Organic and synthetic fertilisers | 133 | 75 | 55 | 119 | 114 |

**The proportions of all types of cargo moved up and down this control section are presented in Tables 2.9 and 2.10.*

***Table 2.6.*** Cargo volumes at the Upper Danube HU/SK cross-border point (going downstream, thousand tonnes)*

| **Commodity group/year** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Organic and synthetic fertilisers | 465 | 445 | 418 | 347 | 430 |
| Petroleum products | 870 | 642 | 653 | 688 | 1,072 |
| Metal products | 140 | 173 | 155 | 169 | 235 |

**The proportions of all types of cargo moved up and down this control section are presented in Tables 2.9 and 2.10.*

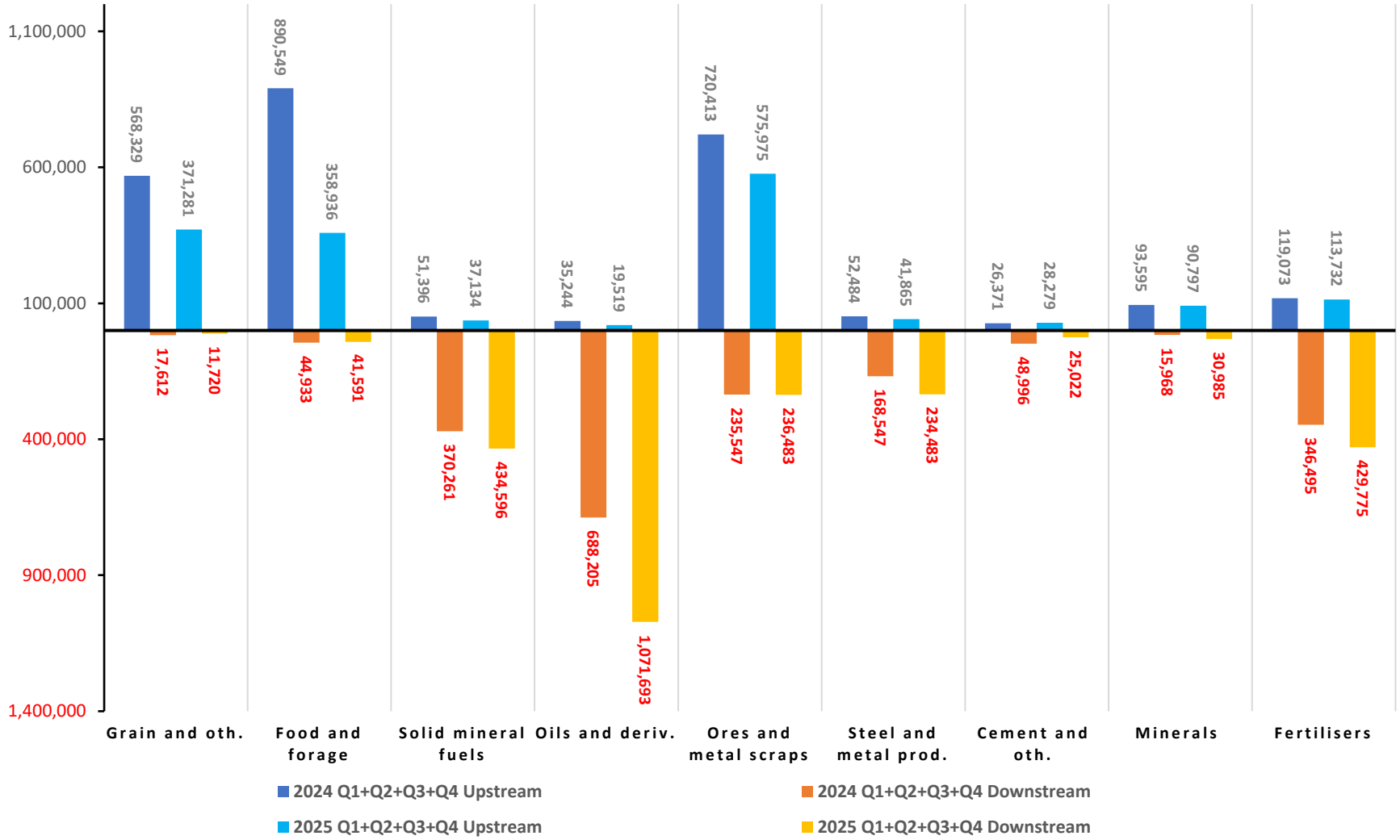


***Figure 9.*** Commodity structure of cargo transport upstream/downstream, through the Gabčíkovo lock, in tonnes

Transport volume

The volume of recorded freight transport through the Mohács checkpoint in 2025 amounted to 3,745 thousand tonnes (Figure 10), or 93% of the cargo volume transported in 2024, of which upstream transit accounted for 1,618 thousand tonnes; i.e., 43% (in 2021 – 50%, in 2022 – 58%, in 2023 – 43%, in 2024 – 47%).

Dry cargo transported amounted to 3,131 thousand tonnes, of which:

- upstream – 1,530 thousand tonnes;
- downstream – 1,601 thousand tonnes.

Liquid cargo transported amounted to 610 thousand tonnes, of which:

- upstream – 88 thousand tonnes;
- downstream – 522 thousand tonnes.

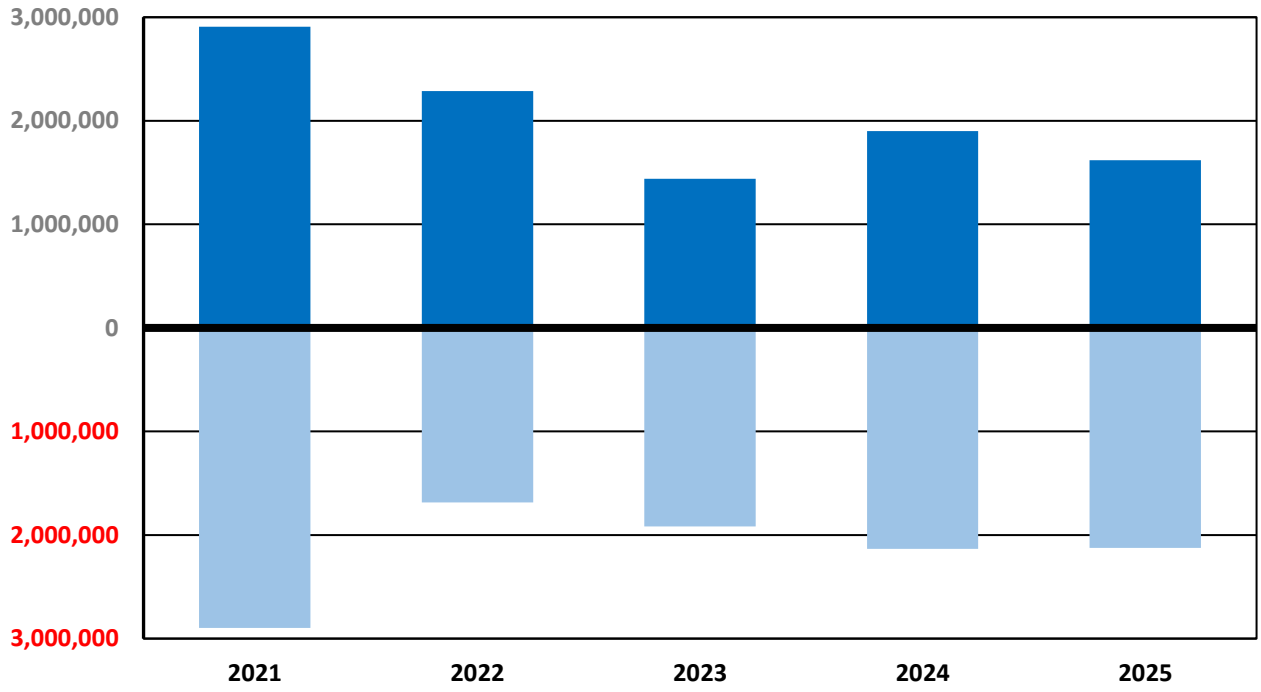


***Figure 10.*** Volumes of cargo transport upstream/downstream, through the Mohács checkpoint, by year, in tonnes

Fleet Movement

Transport by non-motorized vessels (Mohács statistics):

In total, in 2025, over 2,622 thousand tonnes were transported by pushed convoys through the Mohács checkpoint, which represents 70% of the total cargo volume, including liquid cargo (in 2021 – 78%, in 2022 – 73%, in 2023 – 70%, in 2024 – 68%).

a) In terms of dry cargo transport volumes, 2,497 thousand tonnes were transported by pushed convoys (Figure 11), representing 96% of the 2024 volume, of which:

- upstream – 1,203 thousand tonnes, representing 79% (in 2021 – 83%, in 2022 – 78%, in 2023 – 78%, in 2024 – 76%) of the dry cargo volume transported upstream;
- downstream – 1,294 thousand tonnes, representing 81% (in 2021 – 85%, in 2022 – 83%, in 2023 – 77%, in 2024 – 76%) of the dry cargo volume transported downstream.

In total, in 2025, 1,528 (in 2024 – 1,521) non-motorized dry cargo barges passed upstream in pushed convoys, of which 31% (in 2021 – 35%, in 2022 – 19%, 2023 – 32%, in 2024 – 33%) were in ballast. At the same time, of the 1,519 (in 2024 – 1,462) dry cargo barges moving downstream in convoys, 17% (in 2024 – 17%) of the units descended in ballast.

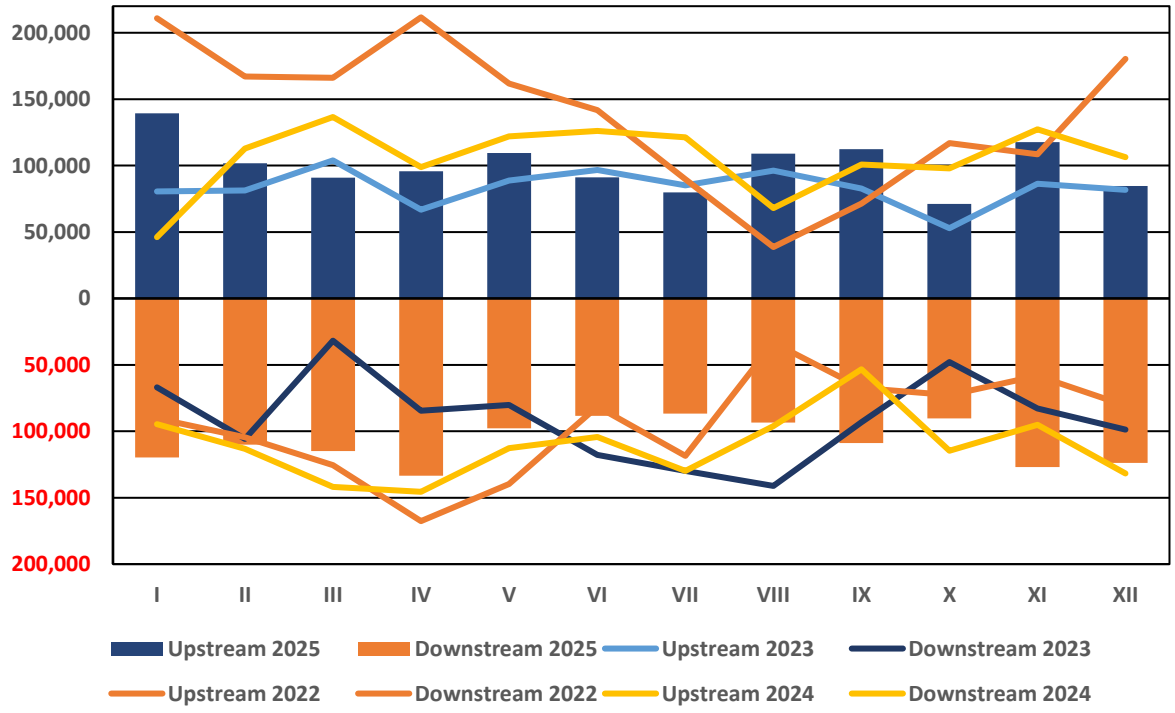


***Figure 11.*** Volumes of cargo transport by non-motorized dry cargo barges upstream/downstream, through the Mohács checkpoint, by month, in tonnes

b) In terms of liquid cargo volumes, 125 thousand tonnes were transported by non-motorized tanker barges within convoys, of which:

- upstream – 3 thousand tonnes;
- downstream – 122 thousand tonnes.

In total, 128 non-motorized tankers passed upstream in pushed convoys, of which 2% were loaded; 129 tankers passed downstream, of which 95% were loaded.

Transport by motorized vessels (Mohács checkpoint statistics):

Motorized Vessel Transport In total, in 2025, 1,120 thousand tonnes were transported by motorized vessels, representing 30% (in 2021 – 22%, in 2022 – 27%, in 2023 – 31%, in 2024 – 33%) of the total volume transported through the Mohács checkpoint, of which:

a) Motorized dry cargo vessels (931 transits, 71% of which were loaded) transported 634 thousand tonnes, of which:

- upstream – 327 thousand tonnes;
- downstream – 307 thousand tonnes.

b) Motorized tankers (total of 789 transits, 59% of which were loaded tankers) transported 485 thousand tonnes of liquid cargo (Figure 12), of which:

- upstream – 85 thousand tonnes;
- downstream – 401 thousand tonnes.

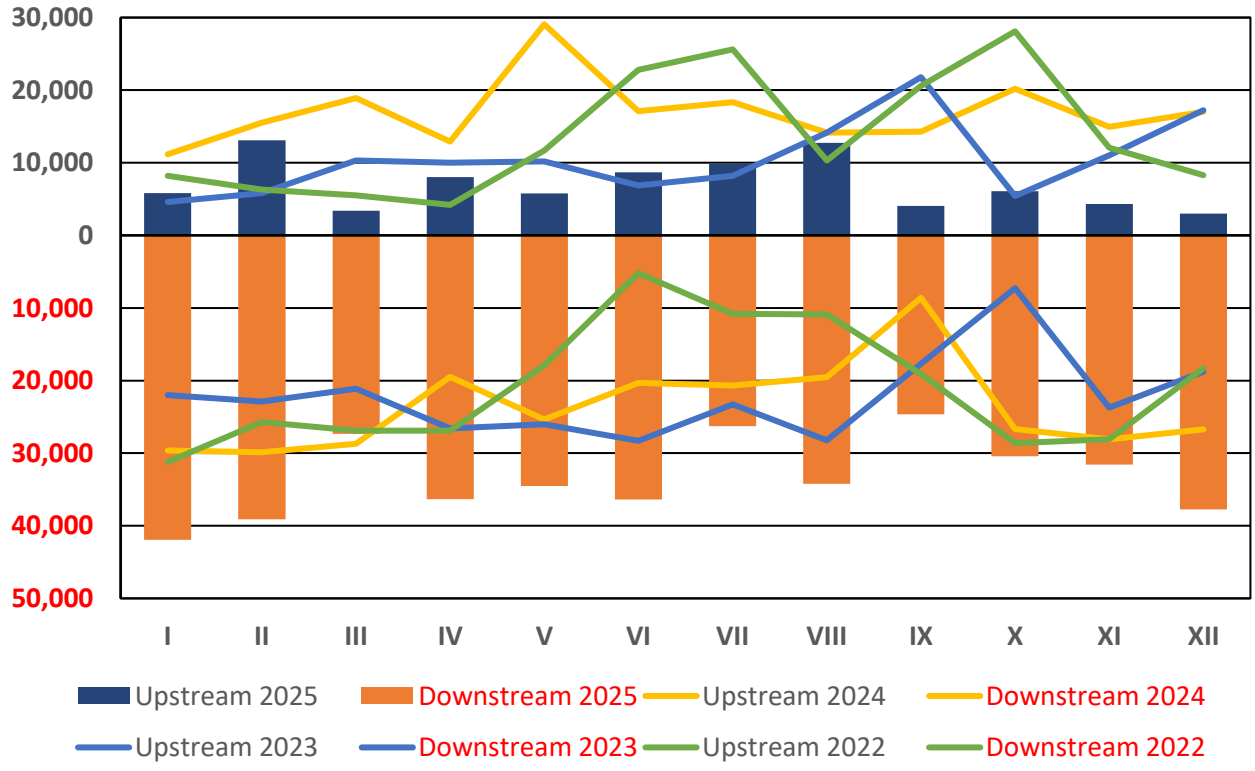


***Figure 12.*** Volumes of cargo transport by motorized liquid cargo barges upstream/downstream, through the Mohács checkpoint, by month, in tonnes

Nomenclature of goods:

Market features in 2025 at this transport control section (Figure 13, Tables 2.7-2.8) in relation to the corresponding indicators of 2024 consist of the following:

a) a decrease in upstream transport volumes of iron ore raw materials and petroleum products, and a decrease in downstream volumes of grain cargoes;
b) the practical absence of upstream coal (coke) transport (a downward trend in these volumes has been observed since 2022);
c) an increase in upstream transport volumes of fertilizers and downstream volumes of petroleum products;
d) the stabilization of downstream transport volumes of metal products.

Significant volumes should be noted for upstream grain cargoes – 241 thousand tonnes (329 thousand tonnes in 2024), mineral cargoes – 229 thousand tonnes (91 thousand tonnes in 2024), as well as downstream coal (coke) – 503 thousand tonnes (447 thousand tonnes in 2024).

***Table 2.7.*** Cargo volumes at the Middle Danube HU/RS cross-border point (upstream, thousand tonnes)*

| **Commodity group/year** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Iron ore raw materials | 991 | 741 | 692 | 747 | 497 |
| Coal (coke) | 281 | 200 | 2 | 24 | 0 |
| Fertilisers | 385 | 256 | 121 | 209 | 406 |
| Petroleum products | 117 | 252 | 154 | 243 | 87 |
| Metal products | 249 | 205 | 111 | 186 | 129 |

**The proportions of all types of cargo moved up and down this control section are presented in Tables 2.9 and 2.10.*

***Table 2.8.*** Cargo volumes* at the Middle Danube HU/RS cross-border point (downstream, thousand tonnes)*

| **Commodity group/year** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| **Grain** | 1,002 | 239 | 317 | 441 | 274 |
| **Petroleum products** | 591 | 322 | 405 | 376 | 520 |
| **Metal products** | 254 | 310 | 381 | 357 | 388 |
| **Food products and animal feed** | 219 | 65 | 216 | 47 | 41 |
| **Fertilisers** | 316 | 316 | 186 | 280 | 306 |

**The proportions of all types of cargo moved up and down this control section are presented in Tables 2.9 and 2.10.*

***Table 2.9.*** Cargo transported through the Gabčíkovo lock

| **Commodity group** | **Total** | **Upstream** | **Downstream** |
|---|---|---|---|
| Grain cargo | 9.1 % | 8.8 % | 0.3 % |
| Food and feed cargo | 10 % | 8.5 % | 1.0 % |
| Solid fuel | 11 % | 0.9 % | 10 % |
| Petroleum products | 26 % | 0.5 % | 25 % |
| Iron ore | 19 % | 14 % | 5.6 % |
| Metal products | 6.5 % | 1.0 % | 5.5 % |
| Cement | 1.3 % | 0.7 % | 0.6 % |
| Minerals | 2.9 % | 2.1 % | 0.7 % |
| Natural and artificial fertilizers | 13 % | 2.7 % | 10 % |
| Others | 1.8 % | 0.7 % | 1.1 % |
| **Total** | **100 %** | **39.4 %** | **60.6 %** |

***Table 2.10.*** Cargo transported through the Mohács checkpoint

| **Commodity group** | **Total** | **Upstream** | **Downstream** |
|---|---|---|---|
| Grain cargo | 14 % | 6.4 % | 7.3 % |
| Food and feed cargo | 1.7 % | 0.6 % | 1.1 % |
| Solid fuel | 13 % | 0.0 % | 13 % |
| Petroleum products | 16 % | 2.3 % | 14 % |
| Iron ore | 15 % | 13 % | 1.9 % |
| Metal products | 14 % | 3.4 % | 10 % |
| Cement | 0.5 % | 0.1 % | 0.4 % |
| Minerals | 6.4 % | 6.1 % | 0.3 % |
| Natural and artificial fertilizers | 19 % | 11 % | 8.2 % |
| **Total** | **100 %** | **43 %** | **57 %** |

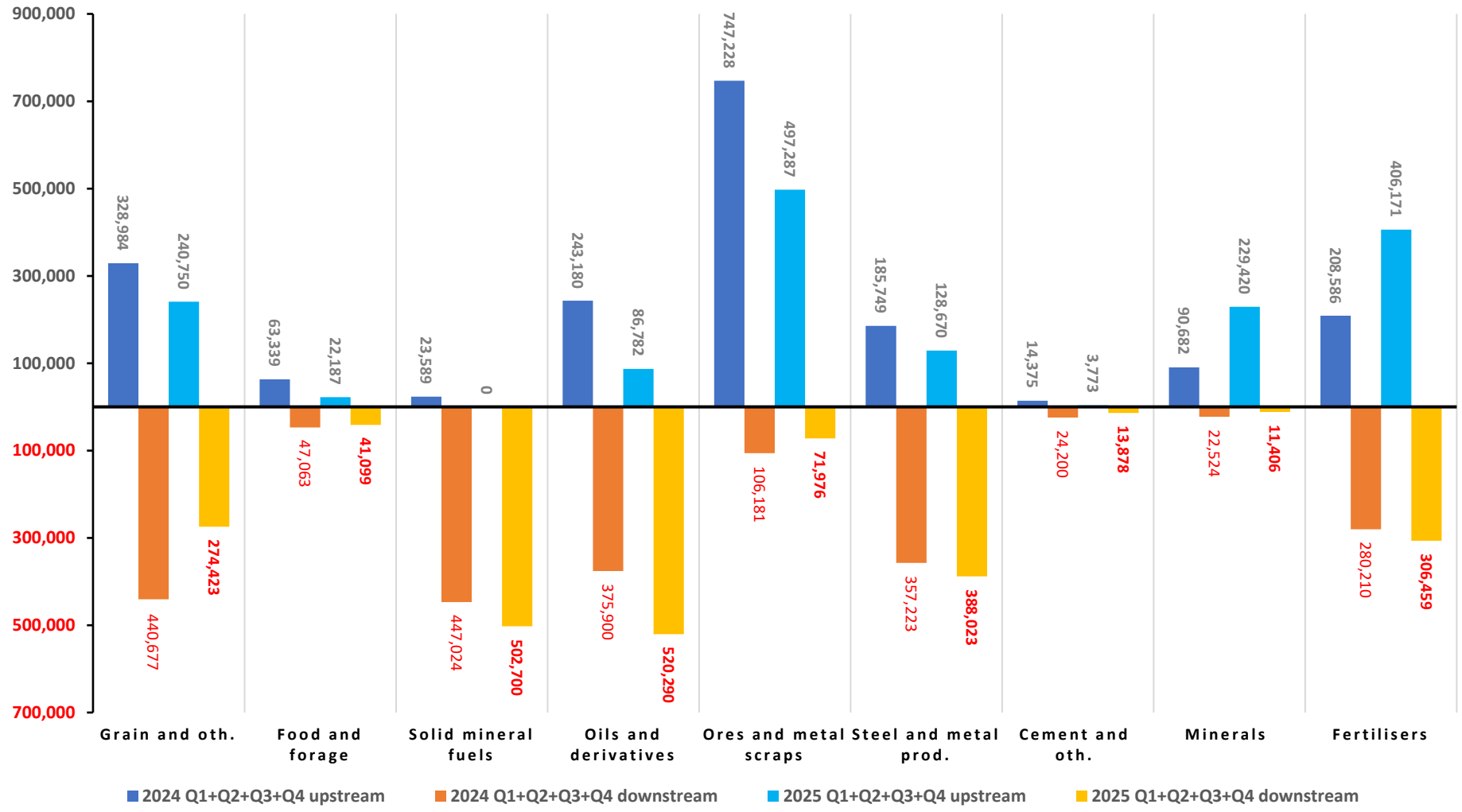


***Figure 13.*** Commodity structure of cargo transport upstream/downstream through the Mohács checkpoint, in tonnes

### 2.3.3 *Inter-basin transport*

The volume of transport via the Danube-Black Sea Canal in 2025 amounted to 14.5 million tonnes, which represents 79% of the same indicator in 2024, of which:

- international transport: 9 million tonnes (64% in comparison to 2024);
- domestic transport: 5.6 million tonnes (124% in comparison to 2024).

Transport volumes by month are shown in Figure 14.

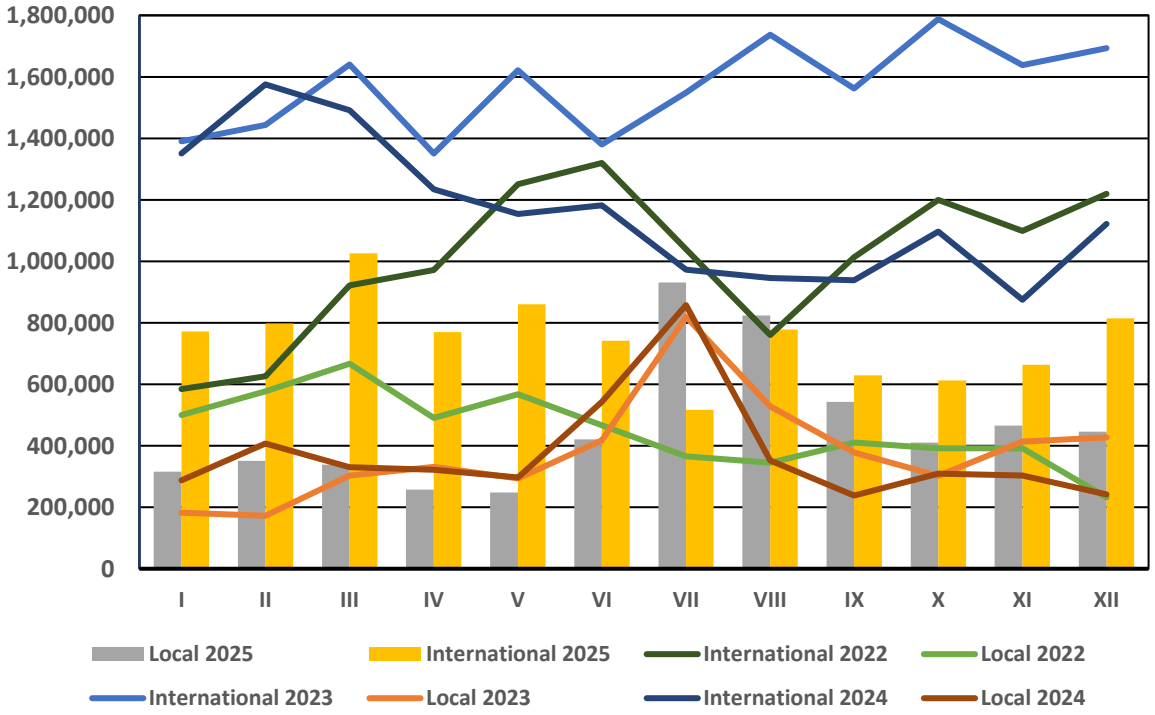


***Figure 14.*** Volumes of international and national cargo transport through the Danube – Black Sea Canal, by month, in tonnes

***Table 2.11.*** Volumes of cargo transport through the Danube-Black Sea Canal

| **Year, mil. tonnes** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Total cargo turnover | 17.3 | 17.3 | 23.4 | 18.4 | 14.5 |
| International transport | 9.1 | 12.0 | 18.8 | 13.9 | 9.0 |
| Domestic transport | 8.2 | 5.3 | 4.6 | 4.5 | 5.6 |

Transport on the Sulina Canal

Transport on the Sulina[5] Canal in 2025 amounted to only 7,471 thousand tonnes, *i.e.* 75% of the same indicator in 2024 (Table 2.12).

***Table 2.12.*** Cargo transport volumes through the Sulina Canal

| Year, thousand tonnes | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Cargo turnover | 5,070 | 10,568 | 16,446 | 9,902 | 7,471 |
| Danube – Black Sea | 3,389 | 7,217 | 12,836 | 3,456 | 3,530 |
| Black Sea - Danube | 1,681 | 3,351 | 3,610 | 6,446 | 3,942 |

A total of 2,708 vessels passed through the Sulina Canal in 2025 (3,141 in 2024), of which:

- Upstream (Black Sea to Danube) - 1,330 vessels (in 2024 - 1,697 units);
- Downstream (Danube to Black Sea) - 1.378 vessels (in 2024 – 1,444 units).

# 3 Overview of the Cargo Turnover of the Danube Ports in 2025

## 3.1 Ports in Germany

In 2025, the total cargo turnover of German Danube ports[6] amounted to 2,266 thousand tonnes, or 107% of the cargo turnover in 2024 (Table 3.1).

***Table 3.1.*** Total cargo turnover of the Danube ports in Germany

| Year (thousand tonnes) | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Cargo turnover | 2,999 | 2,410 | 2,228 | 2,124 | 2,266 |

The cargo turnover of individual Danube ports in Germany in 2025 is represented in Table 3.2.

***Table 3.2.*** Cargo turnover of individual Danube ports in Germany (in thousand tonnes)

| Ports | Kelheim | Regensburg | Deggendorf | Straubing-Sand | Passau |
|---|---|---|---|---|---|
| 2021 | 356 | 1.303 | 132 | 663 | 251 |
| 2022 | 302 | 1.083 | 83 | 552 | 229 |
| 2023 | 252 | 1.021 | 48 | 516 | 218 |
| 2024 | 386* | 944 | 64 | 600 | 130 |
| 2025 | 361* | 1,143 | 102 | 532 | 128 |

**Riedenburg also included*

[5] *Source: www.afdj.ro*
[6] *Source: www.statistik.bayern.de*

The highest cargo volumes in the cargo turnover of Kelheim, Regensburg, and Straubing-Sand in 2025 by group are:

agricultural products (group 01)

- Straubing-Sand - 210 thousand tonnes, Regensburg - 145 thousand tonnes, Kelheim - 93 thousand tonnes.

metal ores (group 03)

- Straubing-Sand - 6 thousand tonnes, Regensburg - 180 thousand tonnes, Kelheim - 90 thousand tonnes.

food (group 04)

- Straubing-Sand - 248 thousand tonnes, Regensburg - 246 thousand tonnes, Kelheim - 69 thousand tonnes.

chemicals and products (group 08)

- Straubing-Sand – 46 thousand tonnes, Regensburg - 117 thousand tonnes. tonnes, Kelheim - 68 thousand tonnes.

fabricated metal products (group 10)

- Straubing-Sand – 0,3 thousand tonnes, Regensburg - 187 thousand tonnes, Kelheim - 10 thousand tonnes.

secondary raw materials and other waste (group 14)

- Straubing-Sand - 13 thousand tonnes, Regensburg - 153 thousand tonnes, Kelheim - 0 thousand tonnes.

## 3.2 Ports in Austria

The total cargo turnover of Austrian ports[7] in 2025 was 5,130 thousand tonnes; i.e., 96% of the cargo turnover in 2024 (Table 3.3).

***Table 3.3.*** Total cargo turnover of Austrian ports

| **Year, thousand tonnes** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Loaded:<br>- export | 2,425 | 1,897 | 2,018 | 1,942 | 2,359 |
| Unloaded:<br>- import | 3,931 | 3,466 | 2,742 | 3,023 | 2,361 |
| Cargo turnover, including transport within the country* | 7,112 | 5,483 | 5,123 | 5,349 | 5,130 |

**The total volume of cargo transported within the country amounted to 410 thousand tonnes; represents 8% of the total cargo turnover of the country's ports.*

The cargo turnover of the main Austrian ports in 2025 is shown in Table 3.4.

[7] *Source: www.statistik.at*

***Table 3.4.*** International cargo turnover of main Austrian ports in 2025

| **Ports (thousand tonnes)** | **Vienna** | **Linz** | **Krems** | **Enns** |
|---|---|---|---|---|
| Cargo turnover 2021 | 927 | 3,482 | 286 | 672 |
| Cargo turnover 2022 | 583 | 2,929 | 298 | 554 |
| Cargo turnover 2023 | 633 | 2,916 | 196 | 416 |
| Cargo turnover 2024 | 683 | 2,820 | 246 | 494 |
| Cargo turnover 2025 | 808 | 2,653 | 242 | 365 |
| Loaded 2025 | 761 | 1,389 | 61 | 51 |
| Unloaded 2025 | 47 | 1264 | 181 | 314 |

The largest volumes of cargo sent to the ports of other countries are shown in Table 3.5.

***Table 3.5.*** Volumes of cargo sent to the ports of other countries

| **Country (thousand tonnes)** | **DE** | **HU** | **RO** | **NL** | **BE** | **RS** | **SK** | **BG** |
|---|---|---|---|---|---|---|---|---|
| 2021 | 400 | 896 | 413 | 123 | 257 | 105 | 111 | 86 |
| 2022 | 270 | 589 | 452 | 109 | 177 | 94 | 96 | 66 |
| 2023 | 232 | 642 | 498 | 78 | 219 | 85 | 180 | 51 |
| 2024 | 323 | 578 | 415 | 74 | 245 | 111 | 114 | 45 |
| 2025 | 314 | 738 | 465 | 141 | 186 | 179 | 238 | 44 |

The largest volumes of cargo received from the ports of other countries are shown in Table 3.6.

***Table 3.6.*** Volumes of cargo received from the ports of other countries

| **Country (thousand tonnes)** | **DE** | **HU** | **RO** | **NL** | **BE** | **RS** | **SK** | **UA** |
|---|---|---|---|---|---|---|---|---|
| 2021 | 295 | 574 | 244 | 467 | 52 | 196 | 1.225 | 847 |
| 2022 | 249 | 539 | 427 | 374 | 67 | 225 | 1.165 | 383 |
| 2023 | 265 | 431 | 757 | 278 | 50 | 110 | 822 | 10 |
| 2024 | 218 | 498 | 581 | 296 | 209 | 222 | 697 | 270 |
| 2025 | 258 | 336 | 239 | 369 | 38 | 69 | 625 | 398 |

## 3.3 Ports in Slovakia

The total cargo turnover of public ports in Slovakia[8] is determined by the cargo turnover of the Port of Bratislava and Komarno (Table 3.7), which amounted to 1,700 thousand tonnes in 2025, or 115% of the cargo turnover in 2024.

***Table 3.7*** Total cargo turnover of public ports in Slovakia

| Year, thousand tonnes | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Loaded | 1,674 | 1,769 | 1,310 | 1,316 | 1,419 |
| Unloaded | 172 | 165 | 199 | 157 | 281 |
| Cargo turnover | 1,846 | 1,934 | 1,509 | 1,473 | 1,700 |

Main cargo volume:

- about 25% - iron ore raw materials;
- about 20% - petroleum products;
- about 15% - coke.

## 3.4 Ports in Hungary

The total cargo turnover of Hungarian ports[9] in 2025 was 3,940 thousand tonnes, or 98% of the 2024 volume (Table 3.8).

***Table 3.8.*** Total cargo turnover of Hungarian ports

| Year, thousand tonnes | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Loaded | 3,109 | 1,924 | 2,062 | 2,385 | 1,698 |
| Unloaded | 2,606 | 2,139 | 1,542 | 1,633 | 2,242 |
| Cargo turnover | 5,715 | 4,063 | 3,604 | 4,019 | 3,940 |

The cargo turnover of the main Hungarian ports is shown in Table 4.9.

***Table 3.9.*** Cargo turnover of the main Hungarian ports

| Ports, thousand tonnes | Baja | Csepel | Győr - Gönyü | Others |
|---|---|---|---|---|
| 2021 | 581 | 1,199 | 267 | 3,668 |
| 2022 | 306 | 985 | 271 | 2,501 |
| 2023 | 350 | 889 | 217 | 2,149 |
| 2024 | 339 | 965 | 248 | 2,466 |
| 2025 | 259 | 1,035 | 187 | 2,459 |

[8] *Sources: Port administrations of Bratislava and Komarno*
[9] *Source: www.ksh.hu*

## 3.5 Ports in Croatia

The total cargo turnover of Croatian river ports (incl. Sava ports)[10] in 2025 was 319 thousand tonnes, or 81% of the volume in 2024 (Table 3.10).

***Table 3.10.*** Total cargo turnover of Croatian river ports (incl. Sava ports)

| Year, thousand tonnes | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Loaded (export): | 274 | 124 | 65 | 85 | 74 |
| Uploaded (import): | 394 | 420 | 272 | 307 | 246 |
| Total (incl. within) | 697 | 583 | 364 | 392 | 319 |

12% of cargo turnover was agricultural products (group 01), 65% - iron ore (group 03), 15% - hard and brown coal (group 02).

## 3.6 Ports in Serbia

The total cargo turnover of Serbian ports[11] (incl. Sava ports) in 2025 was 13,313 thousand tonnes, or 104% of the 2024 volume (Table 3.11).

***Table 3.11.*** Total cargo turnover of Serbian ports (incl. Sava ports)

| Year, thousand tonnes | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Loaded<br>- export | 3,707 | 1,918 | 1,926 | 3,741 | 2,591 |
| Unloaded<br>- import | 5,182 | 4,992 | 6,193 | 5,392 | 6,643 |
| Import/export within the country | 4,721 | 5,113 | 3,912 | 3,683 | 3,046 |
| Cargo turnover | 13,610 | 12,023 | 12,031 | 12,816 | 12,280 |

- 31% of cargo volumes are construction materials (gravel and sand)[12];
- 10% - iron ore;
- 4,8% - grain cargo;
- 18% - crude oil and petroleum products;
- 10% - coal.

Cargo turnover of the main ports in Serbia is presented in Table 3.12[12].

[10] *Source: www.dzs.gov.hr*
[11] *Source: www.stat.gov.rs*
[12] *Source: Port Governance Agency of Serbia (aul.gov.rs)*

***Table 3.12*** Cargo turnover of the main ports in Serbia

| Ports (thousand tonnes) | Pancevo | Smederevo | Belgrade | Novi Sad | Prahovo |
|---|---|---|---|---|---|
| 2021 | 935 | 3,176 | 206 | 1,435 | 1,049 |
| 2022 | 1,589 | 3,053 | 112 | 979 | 933 |
| 2023 | 1,641 | 2,823 | 89 | 918 | 1,054 |
| 2024 | 2,222 | 2,749 | 101 | 1,374 | 1,360 |
| 2025 | 1,290 | 3,068 | 142 | 787 | 1,428 |

## 3.7 Ports in Romania

Total cargo turnover of Romania's Danube ports[13] form:

- ports located on the Maritime Danube,
- ports located on the river section of the Danube,
- ports located on the Danube - Black Sea Canal and the Port of Constanţa.

The total cargo turnover of the main Romanian ports located on the maritime section of the Danube River is presented in Table 3.13.

***Table 3.13.*** Total cargo turnover of the main Romanian ports located on the maritime section

| Ports (thousand tonnes) | Braila | Tulcea | Galati |
|---|---|---|---|
| Freight turnover - riverboats | | | |
| 2021 | 512 | 1,329 | 3,350 |
| 2022 | 825 | 479 | 3,054 |
| 2023 | 364 | 167 | 1.956 |
| 2024 | 132 | 122 | 3,184 |
| 2025 | 208 | 100 | 469 |
| - maritime | | | |
| 2021 | 340 | 3 | 2,496 |
| 2022 | 278 | 10 | 2,119 |
| 2023 | 162 | - | 1,431 |
| 2024 | 134 | - | 1,296 |
| 2025 | 436 | 9 | 1,333 |

[13] *Source: www.insse.ro*

Cargo turnover by maritime vessels forms a part of the Sulina Canal transport volume. In 2025, transport through the Sulina Canal amounted to 7,471 thousand tonnes, or 75% of the 2024 volume.

The total cargo turnover of Romanian ports, including the Port of Constanța (12,967 thousand tonnes) by river going vessels, amounted to 19,499 thousand tonnes, or 82% of the 2024 volume (Table 3.14).

***Table 3.14.*** Total cargo turnover of Romanian ports

| **Year (thousand tonnes)** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Loaded: | | | | | |
| – international transport | 5,203 | 5,641 | 7,003 | 6,719 | 6,966 |
| – domestic transport | 7,108 | 3,857 | 3,059 | 3,297 | 2,293 |
| Unloaded: | | | | | |
| – international transport | 7,121 | 8,900 | 13,463 | 9,004 | 3,329 |
| – domestic transport | 9,025 | 5,957 | 5,331 | 4,738 | 6,911 |
| Freight turnover: | 28,457 | 24,355 | 28,857 | 23,759 | 19,499 |

Highest cargo volumes by groups in % of cargo turnover:

- metal ores (group 03) - 18%;
- agricultural products (group 01) - 40%;
- chemicals (group 08) - 12%
- coke and refined products (group 07) - 14%
- finished metal products (group 10) – 3.5%
- hard and brown coal (group 02) – 5.1%

Structure of cargo turnover by destination in export (loaded):

- to Austria - 424 thousand tonnes;
- to Bulgaria - 470 thousand tonnes;
- to Hungary - 347 thousand tonnes;
- to the Republic of Moldova - 558 thousand tonnes;
- to Serbia – 3,787 thousand tonnes;
- to Ukraine – 1,239 thousand tonnes;

Structure of cargo turnover in import (unloaded):

- from Austria - 214 thousand tonnes;
- from Bulgaria - 986 thousand tonnes;
- from Hungary - 320 thousand tonnes;
- from the Republic of Moldova - 137 thousand tonnes;
- from Serbia – 1,378 thousand tonnes;
- from Ukraine - 269 thousand tonnes.

## 3.8 Ports in Bulgaria

The total cargo turnover of Bulgaria's ports[14], including all terminals and Ro-Ro traffic in 2025, amounted to 5,997 thousand tonnes, which is 80 % of the 2024 volume (Table 3.15).

***Table 3.15.*** Total cargo turnover of Bulgaria's ports

| Year (thousand tonnes) | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Loaded: export | 3,707 | 3,354 | 3,839 | 3,667 | 2,535 |
| Unloaded: import | 2,666 | 2,979 | 2,215 | 2,815 | 2,381 |
| Domestic transport | 738 | 771 | 972 | 1,038 | 1,081 |
| Cargo turnover | 7,111 | 7,104 | 7,026 | 7,520 | 5,997 |

Composition of export:

- bulk cargo - 37%,
- general – 6,7%,
- liquid – 5,9%,
- "Ro-Ro" transport - 50%.

Composition of import:

- bulk cargo - 36%,
- general, 18%,
- liquid – 12%,
- "Ro-Ro" transport - 34%.

## 3.9 Ports in the Republic of Moldova

The total cargo turnover of Giurgiulești port[15] in 2025 was 2,626 thousand tonnes, or 102% of the 2024 volume (Table 3.16).

***Table 3.16.*** Total cargo turnover of Giurgiulești port

| Year (thousand tonnes) | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Cargo turnover | 1,819 | 2,144 | 2,668 | 2,579 | 2,626 |

54% of the port's cargo turnover (1,425 thousand tonnes) consists of export cargo (grain, vegetable oils, petroleum products, mineral fertilizers). In imports (1,198 thousand tonnes), 46% consists of petroleum products, fertilizers, grain, sand, gravel, and coal.

According to the general cargo nomenclature, the main commodity groups are: grains – 48%, sand and gravel – 17%, petroleum products – 12%, coal – 5.8%, mineral fertilizers – 7.5%, and vegetable oils – 3.6%.

[14] *Source: Bulgarian Maritime Administration*
[15] *Source: Water Transport Agency of the Republic of Moldova*

## 3.10 Ports in Ukraine

Total cargo turnover of the Danube ports of Ukraine[16], including cargo turnover by sea vessels in 2025, amounted to 8,907 thousand tonnes, or 51% of the volume in 2024 (Table 3.17).

***Table 3.17.*** Total cargo turnover of the Danube ports of Ukraine

| Year (thousand tonnes) | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| Cargo turnover | 5,505 | 16,505 | 32,021 | 17,396 | 8,907 |

Cargo turnover of the main Danube ports of Ukraine is given in Table 3.18.

***Table 3.18.*** Cargo turnover of the Danube ports of Ukraine in 2025 (thousand tonnes)

| Port* | Izmail | Reni | Ust-Dunaisk |
|---|---|---|---|
| 2025 | 7,625 | 1,098 | 184 |
| % by 2024 | 57% | 32% | 36% |

* Data obtained from the Administration of Sea Ports of Ukraine

***Table 3.19.*** Cargo turnover of Ukrainian ports by main types of goods (thousand tonnes)

| Year/type of goods | Cereals | Other bulk goods | Oil (bulk) |
|---|---|---|---|
| 2025 | 1,437 | 882 | 167 |
| 2024 | 6,435 | 1,871 | 1,030 |
| % by 2024 | 22% | 47% | 16% |

***Table 3.20.*** Cargo turnover of Ukrainian Danube ports in export (thousand tonnes)

| Type of goods/port | Izmail | Reni | Ust-Dunaisk |
|---|---|---|---|
| Cereals | 1,063 | 83 | 3 |
| Other bulk goods | 706 | 43 | 21 |
| Mineral oil products (bulk) | 144 | 18 | 0 |

[16] *Source: Sea Port Administration of Ukraine*

## 3.11 Overview of the cargo turnover of Danube ports

***Table 3.21.*** Cargo turnover of the Danube ports from 2021 to 2025 (thousand tonnes)

| **Country/ period** | **2021** | **2022** | **2023** | **2024** | **2025** |
|---|---|---|---|---|---|
| Germany | 2,999 | 2,410 | 2,228 | 2,047 | 2,266 |
| Austria | 6,356 | 5,363 | 5,123 | 5,349 | 5,130 |
| Slovakia* | 1,846 | 1,934 | 1,509 | 1,473 | 1,700 |
| Hungary | 5,715 | 4,063 | 3,604 | 4,019 | 3,940 |
| Croatia** | 697 | 582 | 364 | 392 | 319 |
| Serbia** | 13,610 | 12,023 | 12,031 | 12,816 | 12,280 |
| Bulgaria | 7,111 | 7,104 | 7,026 | 7,520 | 5,997 |
| Romania | 28,457 | 24,355 | 28,857 | 23,759 | 19,499 |
| Republic of Moldova | 1,819 | 2,144 | 2,668 | 2,579 | 2,626 |
| Ukraine | 5,505 | 16,505 | 32,021 | 17,396 | 8,907 |

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

# 4 Conclusions

Throughout 2025, Russia's full-scale military aggression against Ukraine continued to create serious threats to navigation safety on the Lower Danube. Systematic attacks on the infrastructure of Ukrainian Danube ports increased the risks to fleet movement and cargo operations on the Danube, while also endangering the lives of vessel crews. This had a negative impact on virtually all major sectors of the Danube shipping market in 2025 and on its overall dynamics.

Taking into account the actual navigation safety threats outlined in Chapter 1, as well as the generally unfavorable navigational conditions in 2025, significant distortions were observed in the freight market and the market for passenger transport on cabin vessels. At the same time, changes occurred in the absolute values and relative ratios of the cargo nomenclature, both in vessel transport and in the cargo turnover of Danube ports.

The Danube Commission continues its work on special coordination activities within the framework of the EU-Ukraine Danube Solidarity Lanes Initiative, adopted in May 2022, in support of the European Union's solidarity measures for Ukraine. The work of the Danube Commission under this Initiative is aimed at making use of the potential of Danube shipping to stabilize transport on the Lower Danube, especially to and from Ukrainian Danube ports, as well as ensuring the reliable operation of the Danube-Black Sea Canal links.

In the short term, the Danube Commission's efforts – considering new major international initiatives in support of Ukraine – will focus on ensuring navigation safety on the Danube and stabilizing the market, including the preparation of new logistical schemes for cargo transport to restore Ukraine's transport and energy infrastructure.

Prepared by the Secretariat of the Danube Commission

Cover photo: @kelly
https://www.pexels.com/@kelly/
Printing: Multiszolg Bt.
http://www.multiszolgbt.hu
Publisher: Danube Commission
https://www.danubecommission.org/dc/en/extranet/e-library/