Donaukommission
Commission du Danube
Дунайская Комиссия

Funded by
the European Union

Market Observation for Danube Navigation: Results for the Period January-March 2026

Work package:	WP 2 Facilitate IWT and Modal Shift
Deliverable:	D5
Deliverable related No.	D 2.2-13 (Q_1 2026)
Deliverable name:	Market Observation Reports and Inputs to European Market Observation Report (January-March 2026)
Project:	101127323 – 22 – HU – TG – GRANT 3 - Danube
Type of document:	Report
Prepared by	PS, Iv
Approved by	MS
Date:	07.2026.

1 Initial State of the Market

The initial state of the main sectors of the transport market in Danube navigation at the beginning of 2026 was determined by the dynamics of the third (Q_3) and fourth (Q_4) quarters of 2025 and the overall results of 2025, as well as by indicative forecasts regarding the gross domestic product of the Member States of the European Union and the Eurozone compared with 2025.

The determining factor that affected the state of the transport market in 2025 was the consequences of Russia's full-scale military invasion of Ukraine, which began in February 2022. This led to additional risks and significant distortions in the Danube market.

In the first quarter (Q_1) of 2026, starting from January — the first attack on the Izmail port region occurred on 1 January 2026 — and virtually every month thereafter, Russia regularly carried out aerial attacks using unmanned aerial vehicles against Ukraine's port infrastructure on the Danube River. As a result of these attacks, warehouse facilities and administrative buildings in Ukraine's Danube ports were damaged, and vessels undergoing cargo operations also sustained damage. Civilian facilities adjacent to the port areas were also affected, endangering the lives of civilians. Significant damage was caused to the ecological system of the Lower Danube region as a result of the destruction of infrastructure facilities and the fires that broke out.

In effect, through these aggressive actions, Russia created conditions of direct security threats not only to Ukraine's Danube port infrastructure, but also to the entire vessel traffic system on the Lower Danube, including the safety of vessel crews and personnel. Under these circumstances, despite regular shelling, Ukraine's Danube ports continue to perform their core operational tasks, including supporting exports from Ukraine's agricultural sector, thereby making a substantial contribution to global food security.

During the first quarter of 2026, the Danube Commission continued its active work aimed at providing comprehensive support for exports of Ukrainian agricultural products, as well as imports of goods needed by Ukraine, under the *Danube Solidarity Lanes EU-Ukraine* initiative.

Navigation conditions on the Danube River in 2025, namely stable water availability, were ensured only during the first half of the year. In subsequent periods, water levels (primarily minimum levels) were lower than in the corresponding periods of 2024.

Considering the instability of navigation conditions, as well as the partial reorientation of the market, cargo transport volumes in 2025 amounted to:

- In cross-border traffic Germany/Austria (DE/AT): **2,193 thousand tonnes**, or **84%** of the 2024 volume;
- In cross-border traffic Hungary/Slovakia (HU/SK): **4,198 thousand tonnes**, or **92%** of the 2024 volume;
- In cross-border traffic Hungary/Croatia/Serbia (HU/HR/RS): **3,745 thousand tonnes**, or **93%** of the 2024 volume;
- Cargo volumes transported via the **Danube–Black Sea Canal** amounted to **14.5 million tonnes**, or **79%** of the 2024 volume;
- Cargo volumes via the **Sulina Canal** amounted to **7,471 thousand tonnes**, or **75%** of the 2024 volume.

According to operational data, a total of **2,708 vessels** passed through the Sulina Canal in 2025. Of these, **1,330 vessels** were outbound from the Danube to the Black Sea, while **1,378 vessels** were inbound from the Black Sea to the Danube.

The total cargo turnover of Danube ports in 2025 amounted to **63 million tonnes** (Table 1.1), which is **81%** of the 2024 volume.

Table 1.1. Cargo turnover of the Danube ports in 2022-2025 (thousand tonnes)

Port/year	2022	2023	2024	2025
Germany	2,410	2,228	2,047	2,266
Austria	5,363	5.123	5,349	5,130
Slovakia*	1,934	1,509	1,473	1,700
Hungary	4,063	3,604	4,019	3,940
Croatia**	582	364	392	319
Serbia**	12,023	12,031	12,816	12,280
Bulgaria	7,104	7,026	7,520	5,997
Romania	24,355	28,857	23,759	19,499
Republic of Moldova	2,144	2,668	2,579	2,626
Ukraine	16,505	32,021	17,396	8,907

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

Despite systematic shelling and constant security threats to port service personnel and the crews of vessels undergoing cargo operations, Ukraine's Danube ports — Reni, Izmail and Ust-Dunaisk — were able to ensure the maximum possible export cargo transshipment volumes under the prevailing conditions (Table 1.2).

Table 1.2. Cargo turnover of Ukrainian Danube (river+sea) ports in export in 2025 (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

At the same time, it should be noted that in the cargo turnover structure of the ports of the Ukrainian Danube cluster, alongside exports of agricultural products, there has been an increase in the transshipment volumes of other types of cargo.

Over the past ten years, cargo turnover at or above approximately 1.0 million tonnes per year has been achieved by 10-12 Danube ports, including the Port of Constanța for river vessels (Table 1.3). The highest cargo turnover was recorded in ports specializing in the transshipment of raw materials — ores, coal and bulk fertilizers — as well as grain cargoes and finished products of the ferrous metallurgy industry.

Table 1.3. Cargo turnover of selected ports of the Danube countries in 2022-2025, (thousand tonnes)

Port/year	2022	2023	2024	2025
Regensburg	1,083	1,021	942	1,143
Linz	2,929	2,916	2,820	2,653
Bratislava	1,910	1,414	1,392	1,619
Budapest-Csepel	985	889	965	1,035
Smederevo	3,053	2,823	2,749	3,068
Pancevo	1,589	1,641	2,222	1,290
Novi Sad	979	918	1,374	787
Prahovo	933	1,054	1,360	1,428
Galaţi*	2,302	915	745	469
Giurgiulesti**	2,144	2,668	2,579	2,626
Izmail**	8,893	20,263	13,448	7,625
Reni**	6,826	10,071	3,431	1,098
Constanţa*	15,393	21,698	17,051	12,967

* Cargo turnover by river vessels
** Cargo turnover by river and sea vessels

In the passenger transport market in 2025, stable operation of the main cruise lines on the Upper Danube began in March. Subsequently, an increase was recorded in both the number of voyages and the total number of passengers carried.

In total, 722,000 passengers were carried on the Upper Danube in 2025, according to statistics from the Gabčíkovo Lock for Hungary/Slovakia cross-border traffic. This represented 118% of the 2024 volume.

On the Middle Danube in 2025, according to statistics from the Mohács control point for Hungary/Croatia/Serbia cross-border traffic, there were around 826 cruise vessel passages[1].

[1] Since the partial change in Mohács's status within the market observation system (following Croatia's accession to the Schengen Area in January 2023) the Mohács Border Port administration can only give an estimation for passenger transport results and only for number of vessel passages without number of passengers.

2 Navigation Conditions in the First Quarter of 2026

In January, on the Upper Danube (Figure 1), minimum (LNWL) and mean (MWL) navigable water levels were lower than the corresponding values in January 2025 by 90 cm and 140 cm, respectively, while maximum water levels (HNWL) were higher by 110 cm. The lowest levels were observed in the first ten-day period and in the second half of the third ten-day period of the month. For 20 days, they reached or were below the low navigable water level.

On the Middle Danube (Figure 2), minimum water levels were 80 cm lower than the corresponding values in January 2025, mean levels were 100 cm lower, and maximum levels were 160 cm lower. The lowest levels were observed in the first half of the month. For 28 days, they reached or were below the low navigable water level.

On the Lower Danube (Figs. 3 and 4), minimum water levels were 120 cm lower than the corresponding values in January 2025, mean levels were 50–140 cm lower, and maximum levels were 70–80 cm lower. The lowest levels were observed in the first ten-day period of the month. For 6–9 days, they reached or were below the low navigable water level.

In February, on the Upper Danube (Figure 1), minimum water levels were 80 cm lower than the corresponding values in February 2025. Mean and maximum water levels were higher by 40 cm and 190 cm, respectively. The lowest levels were observed in the first ten-day period of the month. For 6 days, they reached or were below the low navigable water level.

On the Middle Danube (Figure 2), minimum water levels were 30 cm lower than the corresponding values in February 2025. Mean and maximum water levels were higher by 40 cm and 240 cm, respectively. The lowest levels were observed in the first ten-day period of the month. For 8 days, they reached or were below the low navigable water level.

On the Lower Danube (Figs. 3 and 4), minimum water levels were 150–160 cm higher than the corresponding values in February 2025, mean levels were 170–180 cm higher, and maximum levels were 200–240 cm higher. The lowest levels were observed at the beginning of the month and in the second ten-day period.

In March, on the Upper Danube (Figure 1), minimum and mean water levels were 10–40 cm higher than the corresponding values in March 2025, and maximum levels were 130 cm higher. The lowest levels were observed at the end of the month.

On the Middle Danube (Figure 2), minimum water levels were 10 cm higher than the corresponding values in March 2025, while mean and maximum levels were 60–240 cm higher. The lowest levels were observed at the end of the month.

On the Lower Danube (Figs. 3 and 4), minimum water levels were 40–60 cm higher than the corresponding values in March 2025, mean levels were 40 cm higher, and maximum levels were 70–170 cm higher. The lowest levels were observed in the middle of the third ten-day period of the month.

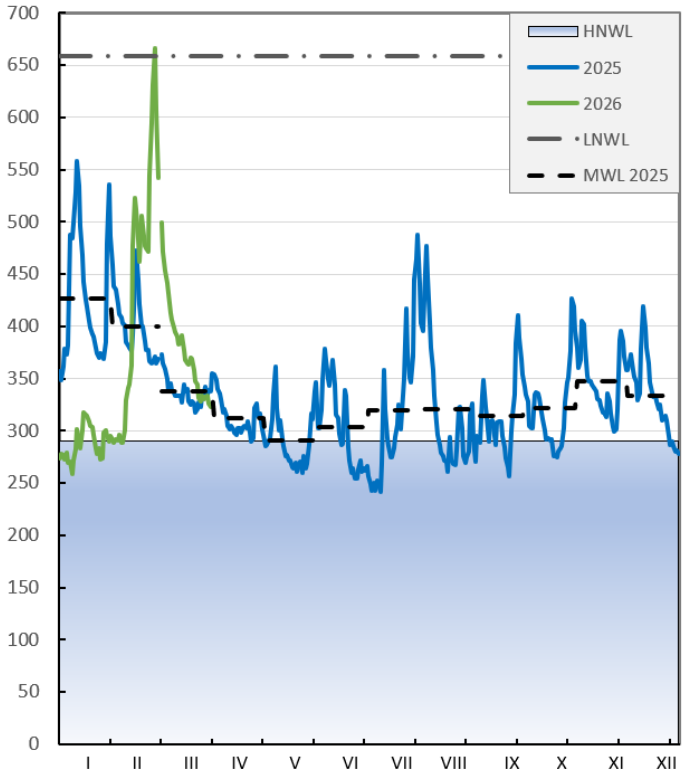

Figure 1. Daily water levels for the Pfelling gauging station (DE), (km 2306+530), in cm

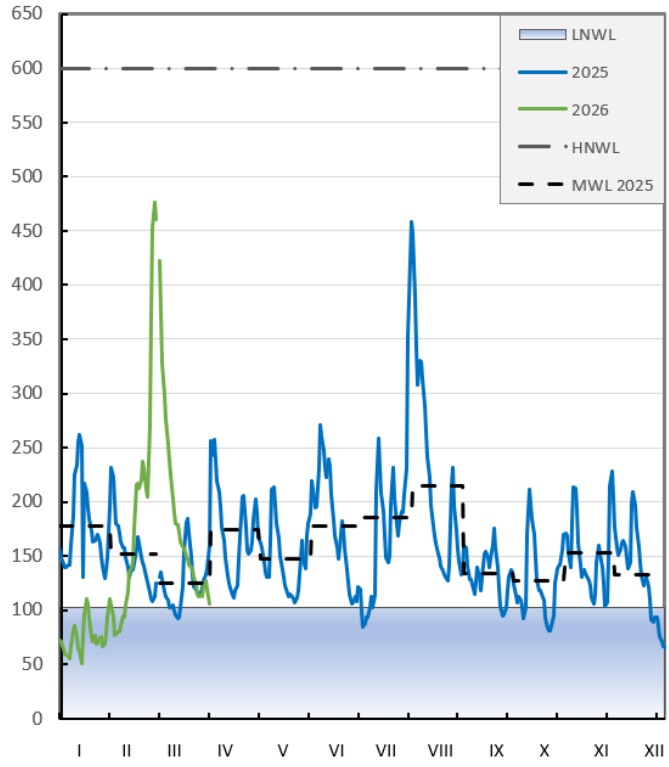

Figure 2. Daily water levels for the Budapest Vigadó station (HU), (km 1646+500), in cm

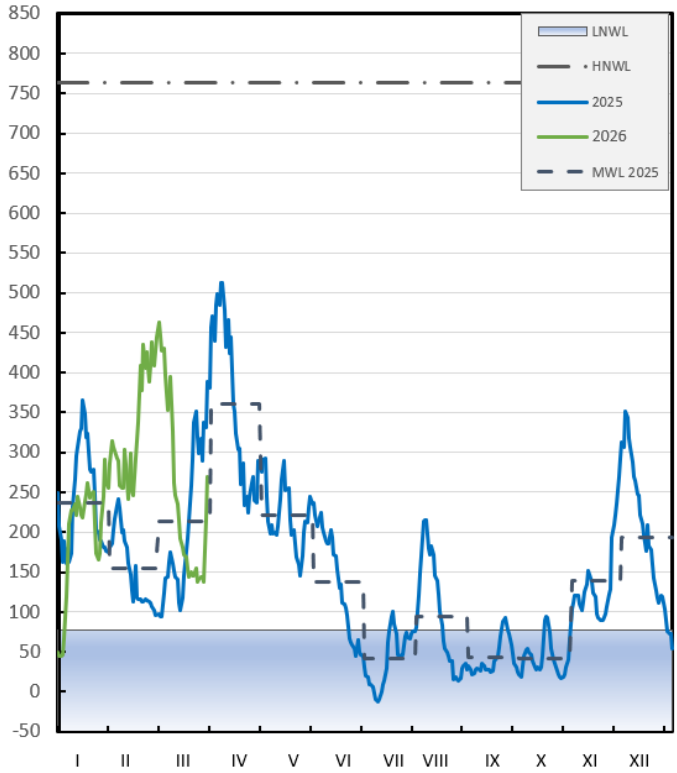

Figure 3. Daily water levels for the Novo Selo gauging station (BG), (km 833+600), in cm

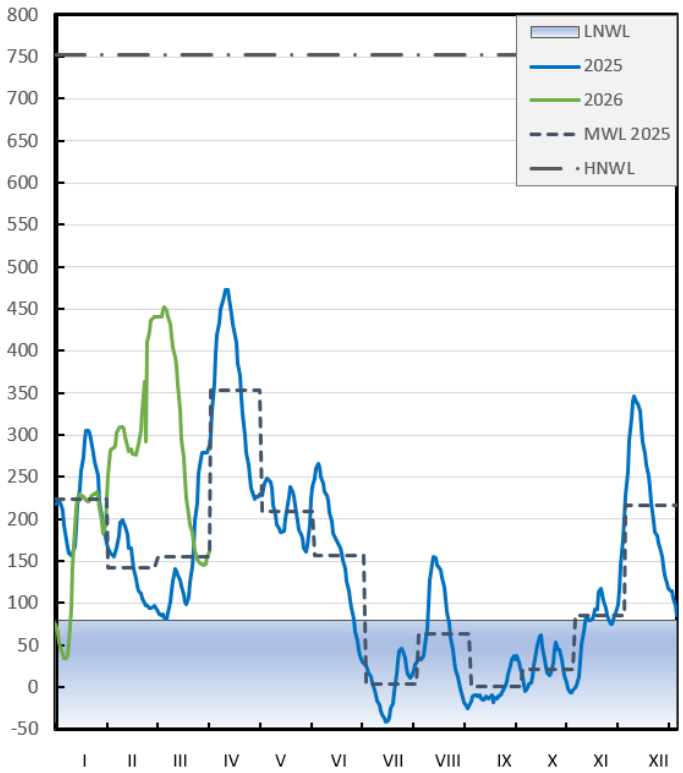

Figure 4. Daily water levels for the Silistra gauging station (BG), (km 375+000), in cm

3 Dynamics of the freight and passenger transport market in the first quarter of 2026

3.1 Hydrological conditions and availability of vessel draughts

In the first quarter of 2026, operating draughts were determined on the basis of the actual values of mean water levels, as set out in Chapter 2 (Table 3.1).

Table 3.1. Draught of cargo vessels in the first three months of 2026 navigation season (cm)

Month	Loaded, going upstream	Loaded, going downstream
January	230/250 (250/270*)	220/230 (220/230)
February	250 (270)	220/210 (230)
March	230 (270)	200/210 (220/240)

* Indicators for the corresponding period of 2025 are given in brackets for comparison.

3.2 Transport volumes, cargo nomenclature and port turnover in the first quarter of 2026

The state of the Danube freight transport market in the first quarter (Q_1) of 2026 was shaped by the main factors listed in Chapter 1, primarily the impact of Russian aggression against Ukraine on the navigation regime on the Danube River and in the adjacent basins (Rhine-Main-Danube system, Black Sea basin).

The volume of cargo transported through the Jochenstein lock (cross-border section Germany/Austria – DE/AT) in Q_1 2026 amounted to 392 thousand tonnes, representing 62% of the volume transported in Q_1 2025.

In the cross-border transport between Hungary and Slovakia (HU/SK):

- The volume of cargo transported through the Gabčíkovo lock in Q_1 2026 was 742 thousand tonnes (72% of the Q_1 2025 volume);
- The volumes of transported cargo by commodity group for Q_1 2025 and Q_1 2026 are shown in Figure 5, while the main groups' volumes for the years 2023–2026 are represented in Tables 3.2 and 3.3.

Table 3.2. Some* cargo volumes on the Upper Danube (HU/SK cross-border point), going upstream, thousand tonnes

Commodity group/year	**2023**	**2024**	**2025**	**2025 (Q_1)**	**2026 (Q_1)**
Food products and animal feed	592	890	359	140	73
Iron ore raw materials	726	720	576	158	62
Grain	427	568	371	93	48
Metal products	56	53	42	13	10
Petroleum products	41	35	20	2	4
Organic and synthetic fertilizers	55	119	114	24	20

** For a more detailed representation of transport volumes, see Figure 5.*

Table 3.3. Some* cargo volumes on the Upper Danube (HU/SK cross-border point), going downstream, thousand tonnes

Commodity group/year	**2023**	**2024**	**2025**	**2025 (Q_1)**	**2026 (Q_1)**
Organic and synthetic fertilizers	418	347	430	141	88
Petroleum products	653	688	1,072	166	178
Metal products	155	169	235	48	64

** For a more detailed representation of transport volumes, see Figure 5.*

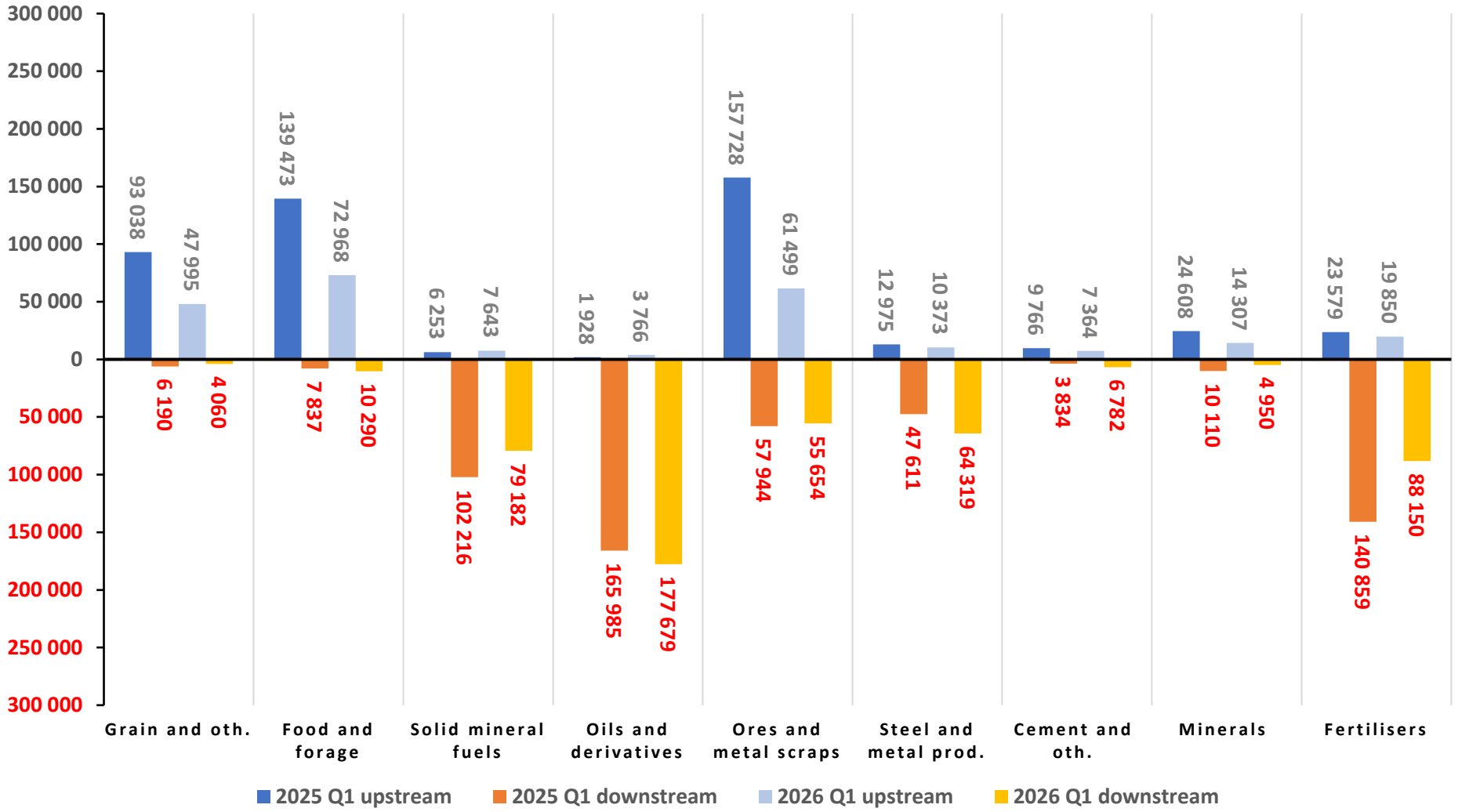

Figure 5. Commodity structure of cargo transport upstream/downstream the Danube River through the Gabčíkovo lock, in tonnes

In the cross-border transport between Hungary, Croatia and Serbia (HU/HR/RS):

- The volume of cargo transported through the Mohács checkpoint in Q_1 2026 was 688 thousand tonnes (69% of the Q_1 2025 volume);
- The volumes of transported cargo by commodity group for Q_1 2025 and Q_1 2026 are shown in Figure 6, while the main groups' volumes for the years 2023–2026 are represented in Tables 3.4 and 3.5.

Table 3.4. Some* cargo volumes at the Middle Danube (HU/HR/RS cross-border point), going upstream, thousand tonnes

Commodity group/ year	**2023**	**2024**	**2025**	**2025 (Q_1)**	**2026 (Q_1)**
Iron ore raw materials	692	747	497	162	73
Coal (coke)	2	24	0	0	0
Fertilizers	121	209	406	123	117
Petroleum products	154	243	87	23	18
Metal products	111	186	129	27	17

** For a more detailed representation of transport volumes, see Figure 6.*

Table 3.5. Some* cargo volumes at the Middle Danube (HU/HR/RS cross-border point), going downstream, thousand tonnes

Commodity group/year	**2023**	**2024**	**2025**	**2025 (Q_1)**	**2026 (Q_1)**
Grain	317	441	274	84	112
Petroleum products	405	376	520	152	40
Metal products	381	357	388	79	75
Food products and animal feed	216	47	41	16	6
Fertilizers	186	280	306	103	75

** For a more detailed representation of transport volumes, see Figure 6.*

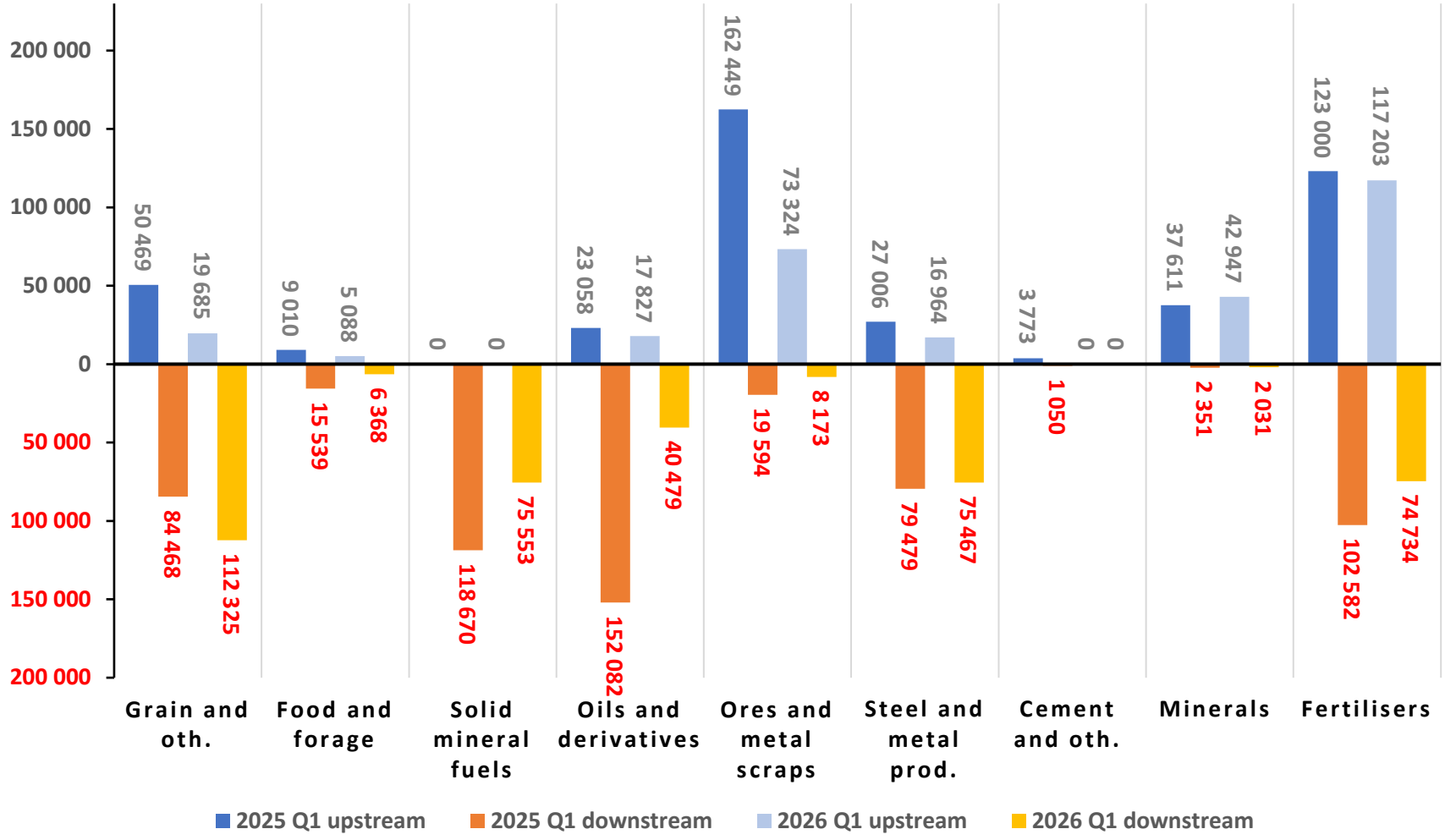

Figure 6. Commodity structure of cargo transport upstream/downstream the Danube River through Mohács, in tonnes

Transport via the Danube – Black Sea Canal

The volume of cargo transported via the Danube – Black Sea Canal in Q_1 2026 (Figure 7) amounted to 3.39 million tonnes, which is 94% of the corresponding figure for Q_1 2025, including:

- International transport accounted for 2.40 million tonnes, or 92% of Q_1 2025;
- Domestic transport accounted for 0.99 million tonnes, or 98% of Q_1 2025.

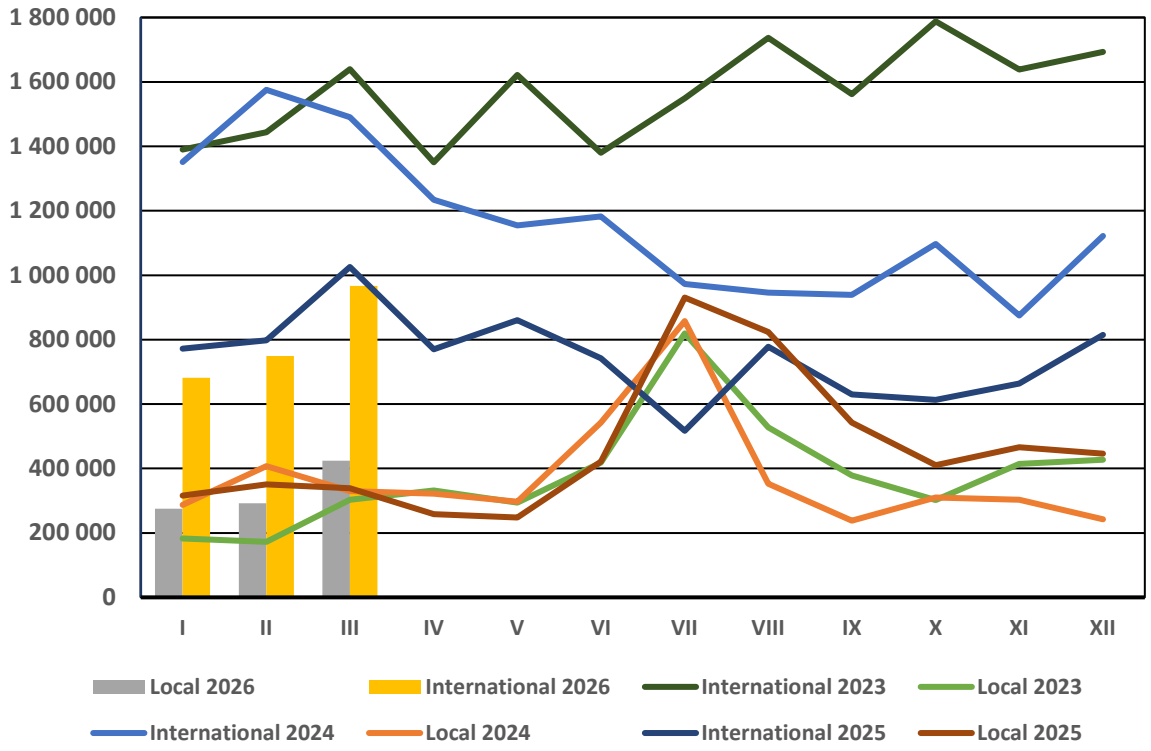

Figure 7. Volumes of international and national cargo transport through the Danube – Black Sea Canal, by month, in tonnes

Cargo turnover of Danube ports in Q_1 2026 (data for Q_1 2022–2025 are provided for comparison) showed divergent trends (Table 3.6).

Table 3.6. Cargo turnover of the ports of the Danube countries in the first quarters of recent years, (thousand tonnes)

Country/year	2022 (Q_1)	2023 (Q_1)	2024 (Q_1)	2025 (Q_1)	2026 (Q_1)
Germany	615	453	1,276	542	474
Austria	1,669	1,232	1,391	1,339	1,088
Slovakia*	502	371	471	424	338
Hungary	1,222	840	1,122	980	728
Croatia**	180	80	90	51	93
Serbia**	3,055	3,426	3,295	3,043	2,726
Bulgaria	1,724	2,001	1,606	1,505	1,462
Romania	6,096	6,012	7,002	4,653	4,332
Republic of Moldova	486	610	699	621	807
Ukraine	1,431	6,806	5,653	2,311	1,728

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

The cargo turnover of the Port of Constanţa by river vessels amounted to 3.1 million tonnes, which is 96% of the cargo turnover in Q_1 2025. During this period, 225 thousand tonnes were loaded in Romanian ports for shipment to Ukrainian Danube ports, while 27 thousand tonnes of cargo were unloaded, arriving from Ukrainian ports.

The cargo turnover of the Ukrainian Danube ports for 2024–2025 and Q_1 2026 is presented in Tables 3.7–3.9.

Table 3.7. Cargo turnover of Ukrainian Danube ports (river+sea), (thousand tonnes)*

Period/port	Izmail	Reni	Ust-Dunaisk
2024	13,448	3,431	517
2025	7,625	1,098	184
2025 Q_1	1,991	266	54
2026 Q_1	1,474	227	27

* Data received from the Administration of Sea Ports of Ukraine

Table 3.8. Cargo turnover of Ukrainian Danube ports (river+sea) in the first quarter of 2026 (thousand tonnes, exports)

Type of good/port	Izmail	Reni	Ust-Dunaisk
Cereals	191 (426)	7 (48)	0.0 (0.0)
Other bulk goods	98 (221)	3 (32)	2.6 (6.0)
Mineral oil products (bulk)	26 (53)	0 (10)	0.0 (0.0)

* Figures in parentheses represent cargo turnover data for Q_1 2025.

Table 3.9. Main components of the total cargo turnover of Ukrainian Danube ports (river+sea) in some recent periods, (thousand tonnes, total)

Period/type of good	Cereals	Other bulk goods	Mineral oil products (bulk)
2023	15,192	4,883	2,920
2024	6,435	1,871	1,030
2025	1,437	882	167
2024 (Q_1)	2,497	667	556
2025 (Q_1)	495	270	67
2026 (Q_1)	284	146	26

3.3 Passenger transport

On the Upper Danube (Gabčíkovo lock statistics), passenger transport on cruise vessels with cabins at the beginning of 2026 showed the following dynamics (Table 3.10).

Table 3.10. Passenger transport at Gabčíkovo in the first months of 2026

Month/indicator	Number of vessel passages (upstream/downstream)	Number of passengers (thousand ppl.)
January	19 (51*)	1.1 (5.0*)
February	21 (10*)	2.0 (1.0*)
March	178 (167*)	22 (18*)

* Indicators for the corresponding period of 2025 are given in bracket for comparison

On the Middle Danube in the first quarter of 2026, according to statistics from the Mohács control point for Hungary/Croatia/Serbia cross-border traffic, there were around 21 cruise vessel passages[2].

4 Conclusions

In the first quarter of 2026, Russia's full-scale aggression against Ukraine continued to affect the Danube navigation market, maintaining the risks characteristic of 2025 and intensifying security threats to navigation on the Lower Danube.

Navigation conditions on the Danube in the first quarter of 2026 were characterized by sharp water level fluctuations, with the average working drafts of cargo vessels during this period being lower than the corresponding figures recorded in the first quarter of 2025. Subsequently, a sharp deterioration in navigation conditions and a decrease in vessel working drafts were observed.

Taking into account a certain market distortion and current navigation conditions, cargo traffic volumes according to data from major checkpoints were lower than the corresponding figures recorded in the first quarter of 2025:

• Upper Danube (conventionally) – Jochenstein lock: 62% of the volume in the first quarter of 2025; Gabčíkovo lock: 72%

• Middle Danube (conventionally) – Mohács control point: 69%

• Traffic volumes through the Danube–Black Sea Canal – 94% of the volume in the first quarter of 2025

At the same time, a drop in volumes was recorded in the transport of cargo types that form the main base of the Danube shipping market: ores, grains, foodstuffs, and chemicals (fertilizers).

The total cargo turnover of Danube ports amounted to 13,776 thousand tons (89% of the volume in the first quarter of 2025). Active passenger transportation by cabin vessels on the Upper Danube began in late March. On the Middle Danube, only an estimation for the number of passages of passenger vessels were noted.

Taking into account available water availability forecasts, navigation conditions on the Danube in the second quarter of 2026 will severely deteriorate. This will require stepping up the efforts of the water administrations of the Danube Commission member states to ensure fleet traffic safety under extreme hydrological conditions, without diminishing attention to the safety issues of fleet and port operations on the Lower Danube.

[2] Since the partial change in Mohács's status within the market observation system (following Croatia's accession to the Schengen Area in January 2023) the Mohács Border Port administration can only give an estimation for passenger transport results and only for number of vessel passages without number of passengers.

On March 4, 2026, the DC Secretariat and the EU Danube Region Strategy, Priority Area 1a (EUSDR PA 1a) organized a joint workshop on the topic of the "*Review of Fairway Conditions on the Danube River in 2025 and Measures to Improve Resilience*". The main topic of the meeting was the introduction of the "deep fairway channel" concept for the entire Danube, aimed at ensuring transport resilience under extreme low-water conditions. On March 05, 2026, the Expert Meeting on Hydrotechnical Matters (EM HYDRO) was held, where waterway administrations presented their plans to fulfill minimum navigation conditions in 2026.

Fulfilment of maintenance plans of waterway administrations will be discussed during the Working Group Meeting on Technical Matters, which will be held November 10-12, 2026.

The special measures undertaken by the Danube Commission jointly with the European Commission under *the Danube Solidarity Lanes EU-Ukraine* initiative helped maintain the transport of export products from Ukraine's agricultural sector and other types of cargo, as well as to stabilize the operation of the Lower Danube ports and ensure the stable use of the Danube–Black Sea Canal connections.

In 2026, the Danube Commission continues to actively support the tasks arising in the implementation of *the Danube Solidarity Lanes EU-Ukraine* initiative by carrying out special coordination activities and, considering new international initiatives in support of Ukraine, by helping to develop positions on preparing Danube navigation for the transport of cargo needed for the restoration and reconstruction of Ukraine's energy and transport infrastructure.