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

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1 General Characteristics of the Danube Shipping Market in the First Half of 2025

1.1 Market conditions until the third quarter of 2025

The initial condition of the Danube shipping market at the beginning of the third quarter (Q_3) of 2025 was shaped by the market dynamics observed in the first half of the year (Q_1+Q_2 2025), as well as by forecasts for its main components for 2025. According to the July 2025 forecast of EUROFER (European Steel Industry Trade Association), no growth in production was expected in the main sectors of the metallurgical industry of the European Union and the Eurozone, including the Danube and adjacent basins (Rhine-Main-Danube system, Black Sea basin). At the same time, the July 2025 forecast of the USDA (United States Department of Agriculture) forecast (July 2025) indicated an increase in key indicators of the agricultural sector and higher transport activity in the current marketing year, including inland waterway transport.

The determining factor influencing market dynamics in the Danube navigation remained the critical situation in the Lower Danube region. During the period under review, the Russian Federation intensified attacks on Ukraine's Danube infrastructure; fragments of Russian unmanned aerial vehicles were also found on the territory of neighboring Romania and the Republic of Moldova. Under these conditions, Romanian authorities were forced to deploy military aviation assets to monitor emerging threats in the Danube border area. As a result, the Danube transport market operated under conditions marked by serious navigation safety challenges and additional risks, leading to a partial reorientation of traffic flows and distortions in certain segments of traditional transport operations.

Starting from January, when the first attack on the Izmail port region in 2025 occurred, and subsequently continuing on an almost monthly basis, Russia carried out air strikes against Ukraine's Danube port infrastructure and adjacent facilities. As a result of these

attacks, grain silos, storage facilities, and administrative buildings were destroyed, and vessels flying the flags of various countries—including Danube countries—were damaged while engaged in cargo operations.

Significant damage was inflicted on the ecosystem of the Lower Danube, including:

- air and soil pollution resulting from fires and the combustion of petroleum products, liquefied gas, and grain;
- pollution of water areas as a result of spills of petroleum products, sunflower oil, and combustion by-products;
- pollution of the Danube Delta with heavy fuel oil following an accident in the Black Sea involving the Russian tankers *Volgoneft-212* and *Volgoneft-239*.

It should be noted that Russia's air and mine attacks created conditions of direct threats to the safety not only of 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. However, despite regular shelling, Ukrainian Danube ports continued to operate. In the structure of their cargo turnover, exports remained primarily oriented towards food commodities, enabling these ports to make a significant contribution to ensuring global food security.

In 2025, the Danube Commission continued its active efforts aimed at comprehensive support for exports—primarily of Ukrainian agricultural products—as well as for imports of goods essential to 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 with Ukraine. The main objective of the initiative was the stabilization and development of logistics schemes for cargo transportation using the Danube ports of Ukraine, the Republic of Moldova, Romania, as well as the Danube–Black Sea Canal connections.

The role and importance of the Danube Solidarity Lanes EU–Ukraine initiative increased following the effective suspension of the Ukrainian Grain Corridor, which had used the ports of Odesa, Pivdennyi, and Chornomorsk (the ports of Greater Odesa). The initiative is aimed at supporting existing logistics schemes and creating new ones for the export of Ukrainian agricultural products based on the cluster of Ukraine's Danube ports. Accordingly, the core objective of the Danube Solidarity Lanes EU–Ukraine initiative remains ensuring the resilience and constant readiness of Danube navigation as a reserve route for transporting agricultural products to and from Ukraine's Danube ports.

1.2 Transport dynamics in the first half of 2025

1.2.1 Water flow and operating draught of vessels

The absence of river freezing and ice phenomena in the first quarter of 2025 ensured uninterrupted navigation on the Danube River during the winter period. Throughout this time, relatively stable water availability was maintained, which made it possible to load vessels to a draught of 2.5–2.7 m when navigating upstream and 2.2–2.3 m when navigating downstream (based on standard vessel draughts on the Middle Danube).

In the second quarter of 2025, water levels on the Danube River, in terms of the absolute values of key indicators (primarily minimum levels), were on average lower than in the second quarter of 2024. On the Upper Danube, during the second half of May and subsequently in June and later periods, water levels episodically fell below the Low Navigable Water Level (LNWL). On the Lower Danube, a sharp decline in water levels was observed from late June onward, leading to a significant reduction in permissible operating draughts and episodic suspensions of navigation on certain river sections.

1.2.2 Market dynamics in the first half of 2025

The state of the Danube cargo transport market in the first half of 2025 (Q_1+Q_2) was shaped by the main factors outlined in Chapter 1, as well as by the continued negative impact of threats to navigation safety resulting from Russia's aggression against Ukraine, and by forecasts for the dynamics of the industrial and agricultural sectors in the Danube basin and adjacent regions.

Taking these factors into account—along with unstable navigation conditions and the partial reorientation of the market—the volumes of cargo transport in (Q_1+Q_2) 2025, according to data from the main checkpoints, were as follows:

- Cargo volumes passing through the Jochenstein lock (cross-border traffic Germany/Austria) in (Q_1+Q_2) 2025 amounted to 1,158.6 thousand tonnes, corresponding to 78% of the volume in (Q_1+Q_2) 2024;
- Cargo volumes passing through the Gabčíkovo lock (cross-border traffic Hungary/Slovakia) in (Q_1+Q_2) 2025 amounted to 2,108 thousand tonnes, corresponding to 89% of the volume in (Q_1+Q_2) 2024;
- Cargo volumes passing through the Mohács checkpoint (cross-border traffic Hungary/Croatia/Serbia) in (Q_1+Q_2) 2025 amounted to 1,961 thousand tonnes, corresponding to 93% of the volume in (Q_1+Q_2) 2024;
- Cargo volumes transported via the Danube–Black Sea Canal in (Q_1+Q_2) 2025 amounted to 6,899 thousand tonnes, corresponding to 68% of the volume in (Q_1+Q_2) 2024, including:
    - international transport: **4,967 thousand tonnes**, representing **62%** of the 2024 level;
    - domestic transport: **1,932 thousand tonnes**, representing **88%** of the 2024 level.

1.2.3 Cargo turnover of ports in the first semester of 2025

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

Table 1.1. Cargo turnover of the Danube ports in 2021-2024 and in the first semesters of 2024-2025 (thousand tonnes)

Country/ period	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Germany	2,999	2,410	2,228	2,047	1,244	1,001
Austria	6,356	5,363	5,123	5,349	2,838	2,632
Slovakia*	1,846	1,934	1,509	1,473	721	802
Hungary	5,715	4,063	3,604	4,019	2,163	2,022
Croatia**	697	582	364	392	164	133
Serbia**	13,610	12,023	12,031	12,816	6,463	6,627
Bulgaria	7,111	7,104	7,026	7,520	3,623	3,306
Romania	28,457	24,355	28,857	23,759	13,103	9,049
Republic of Moldova	1,819	2,144	2,668	2,579	1,254	1,078
Ukraine	5,505	16,505	32,021	17,396	10,273	4,464

** 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.

Table 1.2. Cargo turnover* of Ukrainian Danube ports in the first semester of 2025 (thousand tonnes)

Period/port	Izmail	Reni	Ust-Dunaisk
2024	13,448	3,431	517
Q_{1+2} 2024	7,462	2,489	322
Q_{1+2} 2025	3,878	485	101

**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 the first semester of 2025 (thousand tonnes)

Type of good/port	Izmail	Reni	Ust-Dunaisk
Grain	708 (3,238**)	67(906)	0(150)
Other bulk goods	486 (537)	36 (347)	11(60)
Oil (bulk)	84 (456)	12 (363)	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 decline in total cargo turnover of Ukraine's Danube ports, as well as in their export cargo turnover in the first half of 2025 (Q_1+Q_2), clearly reflects the consequences of Russian attacks on port infrastructure. At the same time, Ukraine's Danube ports demonstrate a commitment to restoring their activity and cargo turnover dynamics to the fullest extent possible.

1.2.4 Passenger transport

On the Upper Danube (Gabčíkovo lock statistics), relatively stable passenger transport by cruise ships with cabins began in April; in total, 1,778 vessel passages were recorded in (Q_1+Q_2), carrying 259 thousand passengers (Table 1.4):

Table 1.4. Passenger transport dynamics (in thousand passengers)

Section/Year	2021	2022	2023	2024	2024 Q_1+Q_2	2025 Q_1+Q_2
Upper Danube (Gabčíkovo)	149	469	562	610	209	259
Middle Danube* (Mohács)	34	74	29	9	5	1

**Since Croatia joined the Schengen Area in January 2023, Mohács has partially lost its role as a passport control point. As a result, the majority of passenger vessel movements are no longer reflected in its official statistics.*

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

2 Navigation Conditions in the First Nine Months of 2025

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

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

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

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

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

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

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

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

On the Middle Danube (Fig. 2), minimum water levels were 140 cm lower than in March 2024, and average and maximum levels were 130 cm lower. The lowest levels were observed at the end of the first and 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 (Figs. 3, 4), minimum water levels were 200-230 cm lower than in March 2024, average levels were 140-190 cm lower, and maximum levels were 20-90 cm lower. The lowest levels were observed at the beginning of the month.

In the second quarter of 2025, water levels on the Danube were mainly maintained above the LNWL, but the 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 (Fig. 1) were lower than the corresponding values in April 2024 by an average of 90 cm. Maximum levels were observed at the beginning of the month, but they did not even reach the minimum levels in April 2024. The lowest levels were observed in the second half of the second third and at the beginning of the final third of the month.

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

On the Lower Danube (Fig. 3, 4), minimum water levels were 30-40 cm lower than the corresponding values in April 2024, average levels were 50 cm higher (Novo Selo) or 70 cm lower (Silistra), and maximum water levels were 130-140 cm higher than the corresponding values in April 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 (Fig. 1), minimum water levels were 100 cm lower than in May 2024, average levels were 120 cm lower, and maximum levels were 140 cm lower. Maximum levels were observed in the second half of the first third of the month, but they did not even reach the minimum water levels in May 2024. Minimum levels were observed during the second half of the second third and the first half of the final third of the month. For 18 days, the levels reached or were below the LNWL value.

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

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

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

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

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

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, with the exception of the second ten-day period of August.

In July, on the Upper Danube (Fig. 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 (Fig. 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 (Figs. 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 the 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 periods 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 (Fig. 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 periods of the month; during this time, water levels reached or dropped below the LNWL for 15 days.

On the Middle Danube (Fig. 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 periods of the month.

On the Lower Danube (Figs. 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 periods 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 (Fig. 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 (Fig. 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 (Figs. 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 periods 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.

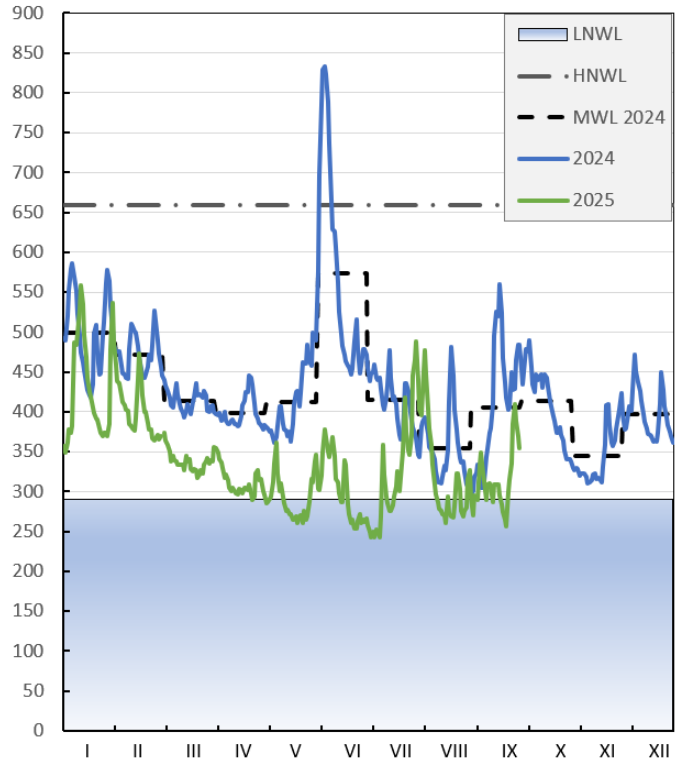

Figure 1. Daily water levels for the Pfelling gauging station (DE), (km 2306+530), in cm

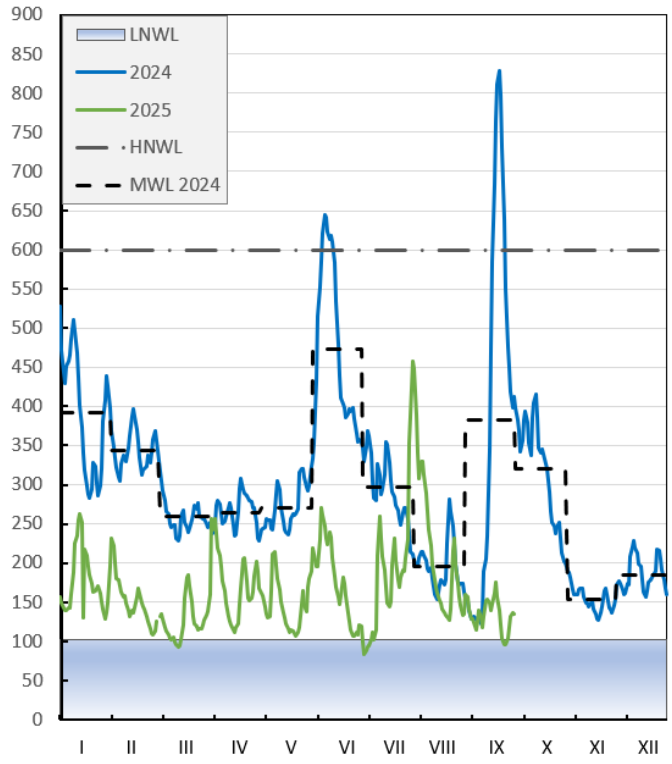

Figure 2. Daily water levels for the Budapest Vigadó station (HU), (km 1646+500), in cm

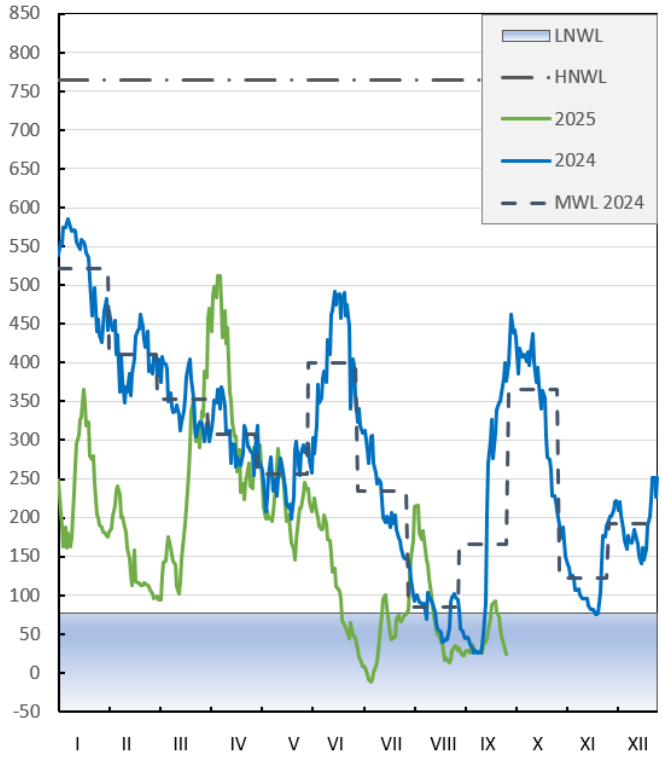

Figure 3. Daily water levels for the Novo Selo gauging station (BG), (km 833+600), in cm

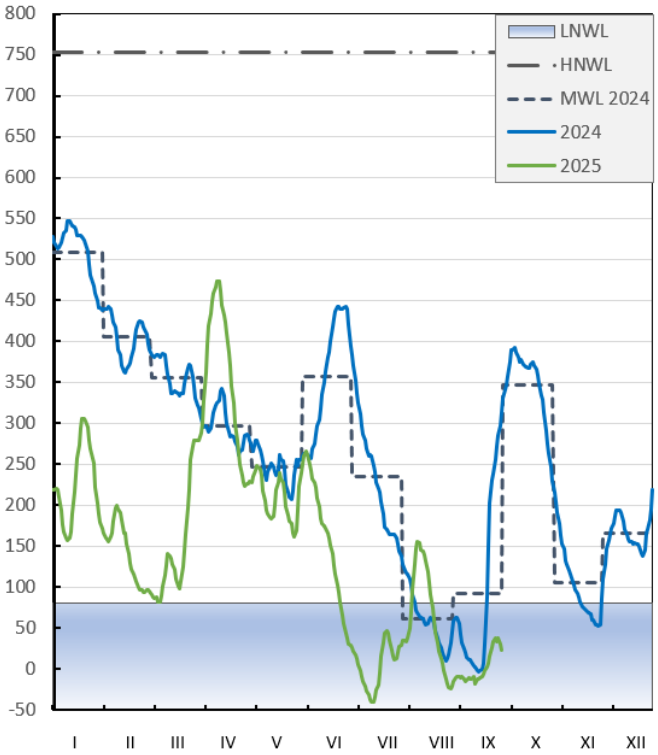

Figure 4. Daily water levels for the Silistra gauging station (BG), (km 375+000), in cm

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

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

Table 2.1. Draughts of cargo vessels during the first nine months of 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*)

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

3 Dynamics of the Freight and Passenger Transport Market in the First Nine Months of 2025

3.1 Passenger transport

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

The core of passenger transport by cruise ships with cabins consists of "short" cruises with a duration of 5–7–8 days, operating on the routes Passau–Vienna–Bratislava–Budapest–Passau, Vienna–Bratislava–Budapest, as well as voyages to and from the ports of the Rhine and Main rivers (conventionally referred to as the "Upper Danube"), and in the direction of the Danube Delta (Table 2.2).

Relatively stable passenger transport by cruise ships with cabins on the Upper Danube began in April.

- At the Jochenstein lock (cross-border traffic Austria/Germany, AT/DE), 348 vessel passages were recorded, representing 109% of the number recorded in the first nine months of 2024.
- On vessels passing through the Gabčíkovo lock (cross-border traffic Hungary/Slovakia, HU/SK), conventionally referred to as the "Upper Danube", 3,707 vessel passages were recorded during the first nine months of 2025 (upstream/downstream ratio: 1,839 / 1,868). In total, 547 thousand passengers were transported (upstream/downstream combined) during the first nine months of 2025, representing 122% of the number recorded in the first nine months of 2024.

Table 3.1. Passenger transport dynamics (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)	149	469	562	610	449	547
Middle Danube (Mohács)*	34	74	29	9	8	2

**Since Croatia joined the Schengen Area in January 2023, Mohács has partially lost its role as a passport control point. As a result. The majority of passenger vessel movements are no longer reflected in its official statistics.*

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

Passenger traffic by cruise ships with cabins (primarily based on routes from Passau and Vienna toward the Danube Delta, with durations of 14–15–16 days) was very limited in the first quarter, with virtually no operations except for isolated passages without passengers. Over the first nine months of 2025, a total of 1.52 thousand passengers were transported, representing 20% of the number recorded in the first nine months of 2024.

It should also be noted that episodic passages of cruise ships with cabins were recorded through the Iron Gate 1 (SRB) lock in the direction of the Lower Danube.

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

3.2 Freight transport

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

Transport volume

The volume of cargo transported through the Jochenstein lock during the first nine months of 2025 amounted to 1,668 thousand tonnes, representing 81% of the volume recorded in (Q_1+Q_2+Q_3) 2024.

The volume of recorded cargo transported through the Gabčíkovo lock during the first nine months of 2025 exceeded 3,188 thousand tonnes, corresponding to 92% of the volume recorded in (Q_1+Q_2+Q_3) 2024. Upstream transit amounted to approximately 1,353 thousand tonnes, or about 42% of the total volume recorded in 2024 (Fig. 5).

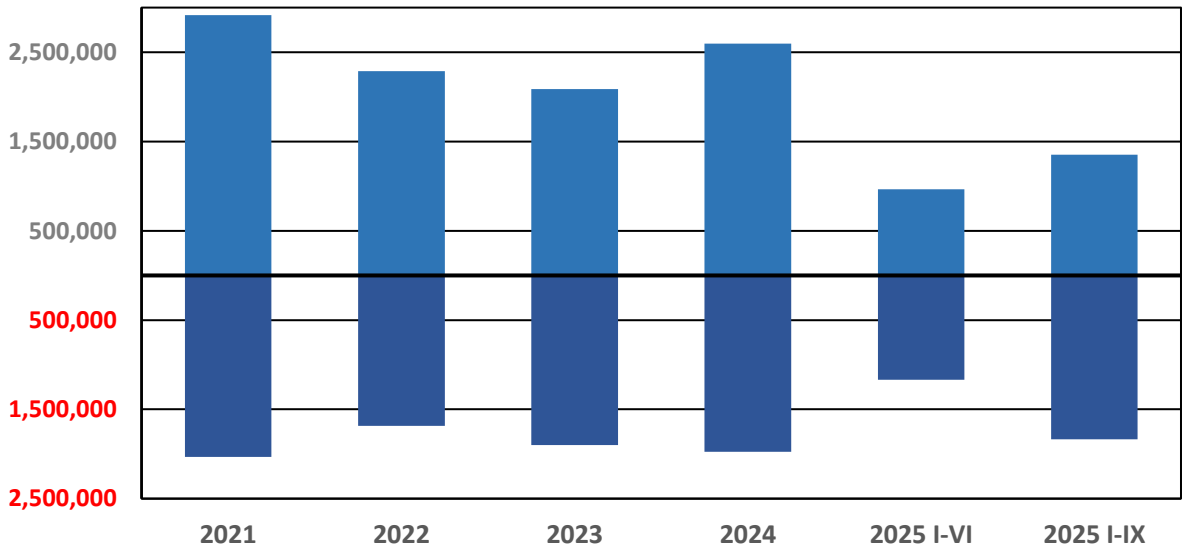

Figure 5. Transport volume at the GABČIKOVO lock in upstream and downstream traffic on the Danube River, per year, in tonnes

A total of 2,410 thousand tonnes of dry cargo were transported through the Gabčíkovo lock, including:

- upstream: 1,288 thousand tonnes;
- downstream: 1,122 thousand tonnes.

A total of 778 thousand tonnes of liquid cargo were transported, including:

- upstream: 65 thousand tonnes;
- downstream: 713 thousand tonnes.

Nomenclature of goods (Gabčíkovo lock statistics):

The specific features of the market on this section during (Q_1+Q_2+Q_3) 2025 (Fig. 6) include:

a) a decline in upstream transport volumes of food stuffs and animal feed, as well as grain cargoes and fertilisers; at the same time, a relative stabilization was observed in upstream transport volumes of iron ore raw materials (449 thousand tonnes, compared with 504 thousand tonnes in (Q_1+Q_2+Q_3) 2024);
b) an increase in downstream transport volumes of petroleum products, fertilisers, metal products, and solid mineral fuels (coal and coke: 327 thousand tonnes, compared with 235 thousand tonnes in (Q_1+Q_2+Q_3) 2024).

The ratio of the main cargo volumes transported upstream and downstream, as well as their absolute values at this checkpoint, are presented in Tables 2.3–2.4 and in Fig. 6.

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

Commodity group/year	**2021**	**2022**	**2023**	**2024**	**2024 Q_1+Q_2+Q_3**	**2025 Q_1+Q_2+Q_3**
Food products and animal feed	879	783	592	890	742	305
Iron ore raw materials	969	735	726	720	504	449
Grain	394	416	427	568	447	296
Metal products	71	101	56	53	39	30
Petroleum products	87	92	41	35	27	16
Organic and synthetic fertilisers	133	75	55	119	90	88

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

Commodity group/year	**2021**	**2022**	**2023**	**2024**	**2024 $Q_1+Q_2+Q_3$**	**2025 $Q_1+Q_2+Q_3$**
Organic and synthetic fertilisers	465	445	418	347	289	323
Petroleum products	870	642	653	688	552	738
Metal products	140	173	155	169	119	171

**Another significant volume consists of coal (coke), amounting to 327 thousand tonnes.*

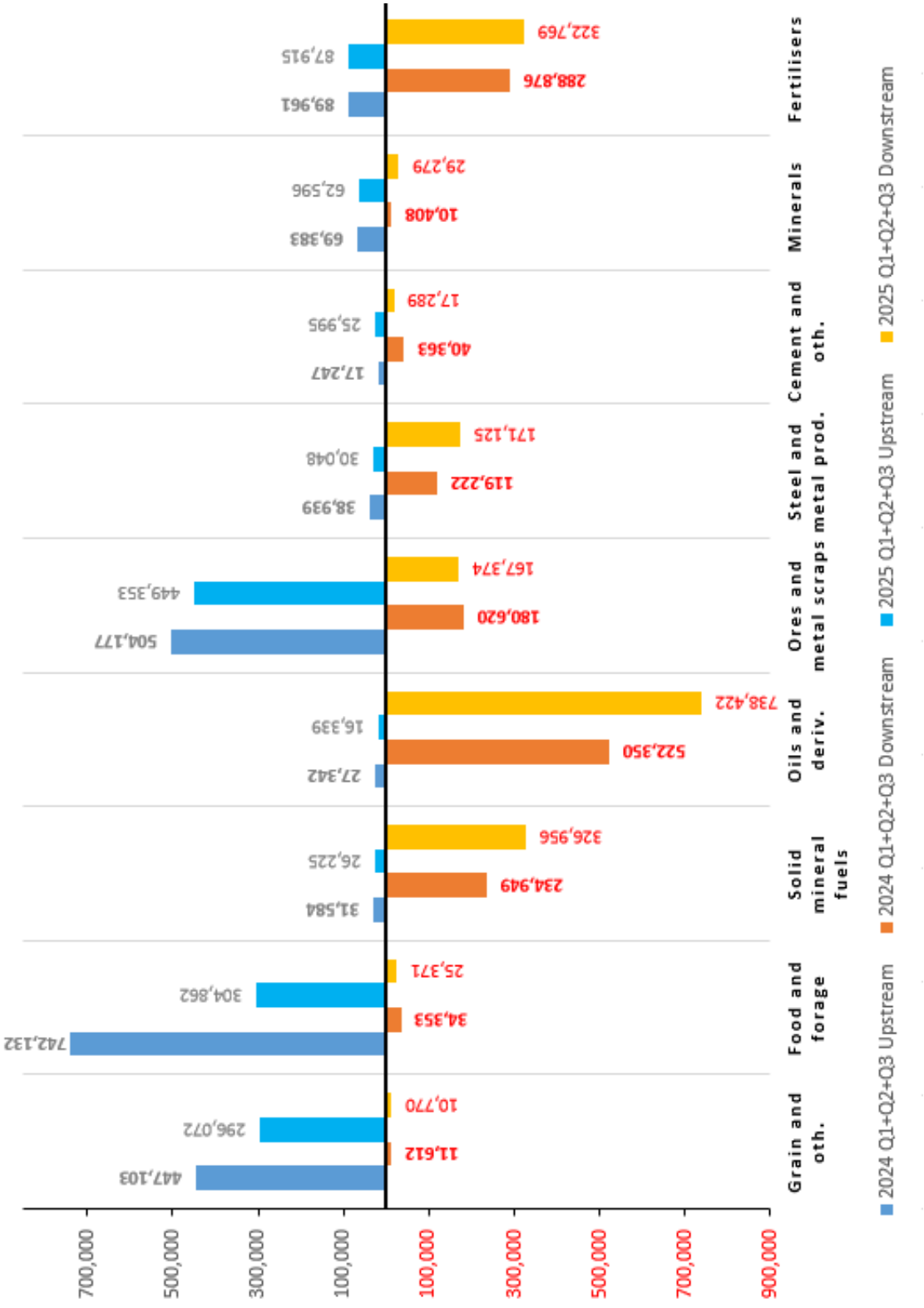

Figure 6. Commodity structure of cargo transport upstream/downstream the Danube River through the Gabčíkovo lock, in tonnes

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

Transport volume

The volume of recorded cargo transported through Mohács during the first nine months of 2025 amounted to 2,828 thousand tonnes (Fig. 7), representing 95% of the cargo volume transported in (Q_1+Q_2+Q_3) 2024. Of this total, upstream transit accounted for 1,262 thousand tonnes, or 45% (compared with 47% in (Q_1+Q_2+Q_3) 2024).

A total of 2,358 thousand tonnes of dry cargo were transported, including:

- upstream: 1,187 thousand tonnes;
- downstream: 1,171 thousand tonnes.

A total of 470 thousand tonnes of liquid cargo were transported, including:

- upstream: 74 thousand tonnes;
- downstream: 395 thousand tonnes.

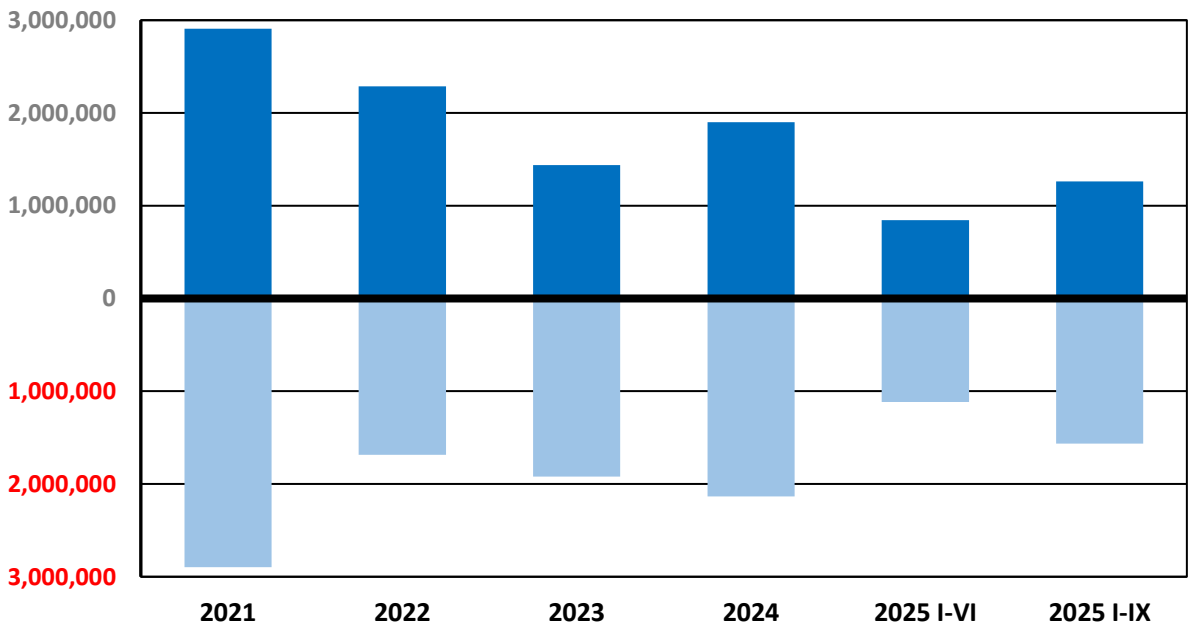

Figure 7. Transport volume in MOHÁCS in upstream and downstream traffic on the Danube River per year in tonnes

Nomenclature of goods:

The main features of the market during (Q_1+Q_2+Q_3) 2025 (Fig. 8) include:

a) a decline in upstream transport volumes of iron ore raw materials (74% of the volume recorded in (Q_1+Q_2+Q_3) 2024 and 54% of that recorded in (Q_1+Q_2+Q_3) 2023), as well as a decline in metal products and petroleum products;
b) the near absence of upstream transport of solid mineral fuels (coal), accompanied by an increase in downstream transport volumes to 375 thousand tonnes (compared with 247 thousand tonnes in (Q_1+Q_2+Q_3) 2024);
c) a decline in downstream transport volumes of grain cargoes (48% of the volume recorded in (Q_1+Q_2+Q_3) 2024), alongside an increase in upstream grain transport volumes to 212 thousand tonnes (compared with 150 thousand tonnes in (Q_1+Q_2+Q_3) 2024); a similar pattern was observed for metal products, with increasing downstream volumes and declining upstream volumes;
d) an increase in upstream transport volumes of fertilisers and a rise in downstream transport volumes of petroleum products.

The ratio of the main cargo volumes transported upstream and downstream, as well as their absolute values at this checkpoint, are presented in Tables 2.5–2.6 and Fig. 8.

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

Commodity group/ year	**2021**	**2022**	**2023**	**2024**	**2024 Q_1+Q_2+Q_3**	**2025 Q_1+Q_2+Q_3**
Iron ore raw materials	991	741	692	747	548	404
Coal (coke)	281	200	2	24	12	0
Fertilisers	385	256	121	209	131	299
Petroleum products	117	252	154	243	182	73
Metal products	249	205	111	186	158	90

**Since Croatia joined the Schengen Area in January 2023, Mohács has partially lost its role as a passport control point. As a result, a minority of cargo vessel movements are no longer reflected in its official statistics.*

***Two other significant cargo categories are grain and minerals (212 and 163 thousand tonnes).*

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

Commodity group/year	2021	2022	2023	2024	2024 $Q_1+Q_2+Q_3$	2025 $Q_1+Q_2+Q_3$
Grain	1,002	239	317	441	370	177
Petroleum products	591	322	405	376	266	394
Metal products	254	310	381	357	263	280
Food products and animal feed	219	65	216	47	20	31
Fertilisers	316	316	186	280	238	237

**Since Croatia joined the Schengen Area in January 2023, Mohács has partially lost its role as a passport control point. As a result, a minority of cargo vessel movements are no longer reflected in its official statistics.*
***Another significant cargo category is coal (coke) (375 thousand tonnes).*

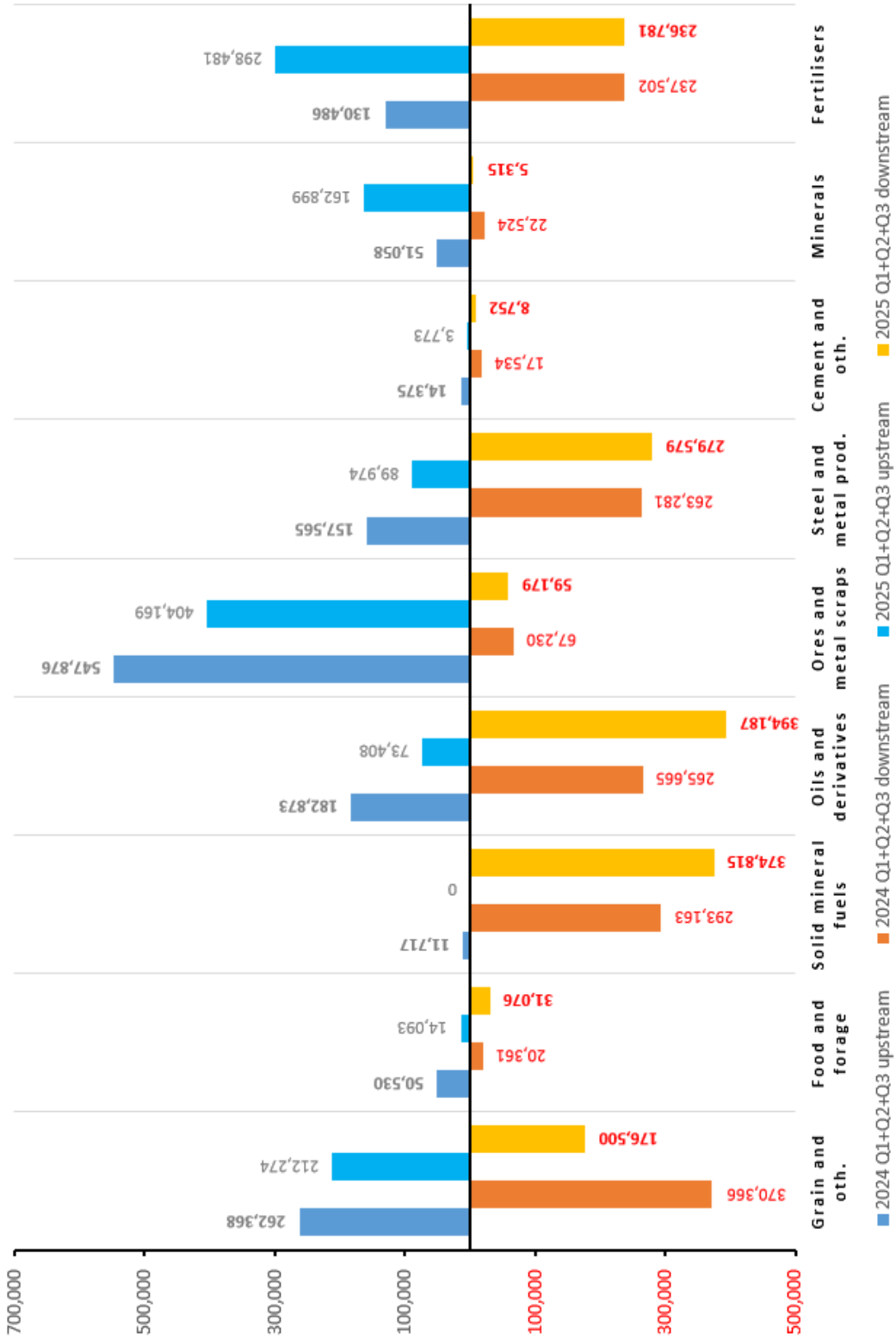

Figure 8. Commodity structure of cargo transport upstream/downstream the Danube River through Mohács, in tonnes

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

The volume of transport on the Danube-Black Sea Canal in the first nine months of 2025 amounted to 11,121 thousand tonnes, which is 77% of the same indicator in 2024, of which:

• international transport: 6,892 thousand tonnes (64% of the 2024 figure);

• domestic transport: 4,229 thousand tonnes (116% of the 2024 figure),

Transport volumes by month are shown in Fig. 9.

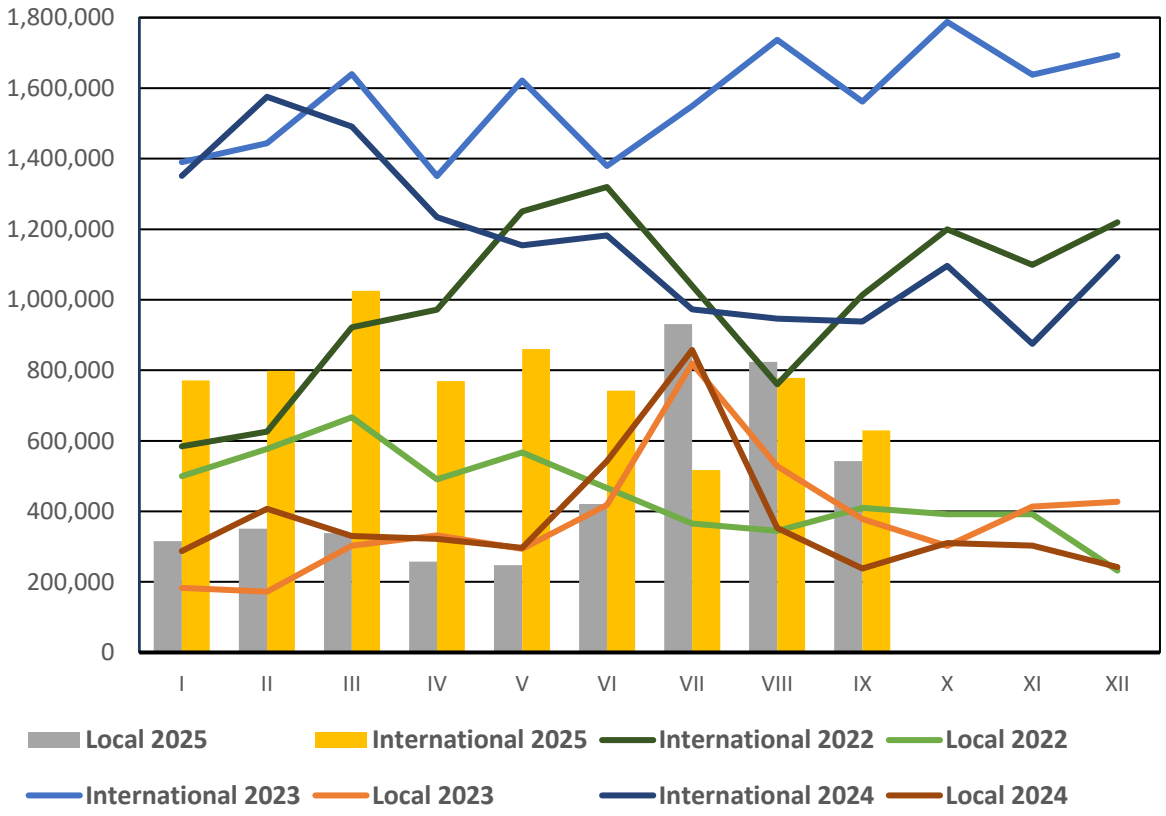

Figure 9. Volumes of international and national cargo transport through the Danube – Black Sea Canal, by month. in tonnes

4 General Characteristics of Cargo Turnover at Danube Ports

Cargo turnover at Danube ports in the first nine months of 2025 ($Q_1+Q_2+Q_3$) compared to ($Q_1+Q_2+Q_3$) in 2024 varied in different directions (Table 41),

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

Country/year	2021	2022	2023	2024	2024 $Q_1+Q_2+Q_3$	2025 $Q_1+Q_2+Q_3$
Germany	2,999	2,410	2,228	2,047	1,578	1,714
Austria	7,112	5,484	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	215,3
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

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

The decline in total cargo turnover at Ukraine's Danube ports, as well as in their export cargo turnover during the first nine months of 2025, clearly reflects the consequences of Russian attacks on their infrastructure (Tables 3.2–3.3). At the same time, Ukraine's Danube ports demonstrate a strong commitment to restoring their activity to the maximum extent possible by implementing a set of decisive measures undertaken by the Government of Ukraine, with the support of the European Union and the Danube Commission, aimed at ensuring the export of agricultural products and other cargoes through the ports of Reni, Izmail, and Ust-Dunaisk, as well as the import of goods essential for the country.

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

Period/port	Izmail	Reni	Ust-Dunaisk
2024	13,448	3,431	517
2024 ($Q_1+Q_2+Q_3$)	10,728	3,020	433
2025 ($Q_1+Q_2+Q_3$)	5,777	839	157

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

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

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

*The volumes presented in this table include cargo transported by both river and sea vessels
** Data received from the Administration of Sea Ports of Ukraine
***Figures in parentheses represent cargo turnover data for first nine months of 2024

5 Conclusions

During the first nine months of 2025, Russia's full-scale military aggression against Ukraine continued to pose real threats to the safety of navigation on the Lower Danube. Systematic attacks on the infrastructure of Ukraine's Danube ports intensified these risks, negatively affecting virtually all major sectors of the Danube shipping market and its overall dynamics in 2025.

Taking into account the security threat factors outlined in Section 1, as well as unfavorable navigation conditions in the first half of 2025 (particularly at the end of the second quarter), certain distortions have been observed in both cargo transport and passenger transport by cruise ships with cabins. Changes were also recorded in the absolute volumes and relative proportions of cargo categories, both in vessel traffic and in the cargo turnover of Danube ports.

The Danube Commission continues its work on implementing special coordination measures within the framework of the Danube Solidarity Lanes EU–Ukraine initiative, adopted in May 2022 in support of the European Union's solidarity measures with Ukraine. These measures are aimed at actively utilizing the potential of Danube navigation to stabilize transport operations on the Lower Danube, especially to and from Ukraine's Danube ports, as well as at ensuring the stable functioning of the Danube–Black Sea Canal connections.

In the short term, the Danube Commission is focusing on market stabilization, including the preparation of cargo transport operations for the restoration of Ukraine's transport and energy infrastructure, as well as on ensuring the safety of navigation on the Danube River.