

# Maritime Transport in the Candidate Countries 1995-2000

*Cargo mostly loaded on the Baltic coastline while mostly unloaded on the other coastlines*

Georgios Xenellis

Figure 1: Tonnage handled by Candidate Countries' major ports in 2000 - share by country

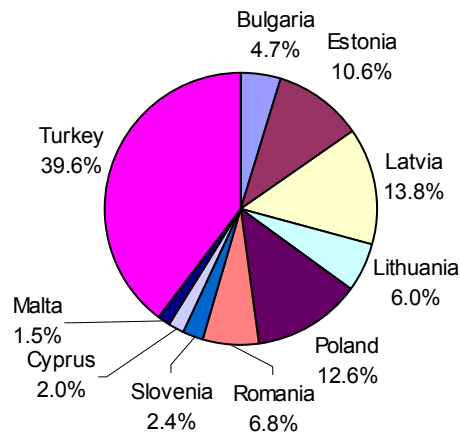


Table 1: TOP-15 maritime ports in the Candidate Countries, 2000 on the basis of total tonnage handled - in million tonnes

1	Ventspils / LV	34.8
2	Izmit / TR	31.4
3	Tallinn / EE	29.2
4	Aliaga / TR	24.6
5	Constantza / RO	22.9
6	Klaipeda / LT	22.7
7	Istanbul / TR	17.5
8	Gdansk / PL	16.5
9	Riga / LV	13.3
10	Mersin / TR	12.8
11	Iskenderun / TR	11.8
12	Szczecin / PL	10.9
13	Koper/Capodistria / SI	9.0
14	Swinoujscie / PL	8.9
15	Gdynia / PL	8.4

Note: Bulgaria did not report.

## Highlights

The 41 major ports of the Candidate Countries handled over 376 million tonnes of cargo by sea in 2000. The three MED CCs accounted for 43% of the overall maritime transport with 22 major ports, most of which located in Turkey.

The tonnage of cargo transported by sea grew from 305 million in 1995 to 382 million in 2000, with an average increase of about 3.3% per year in the PHARE region and 6.4% per year in the MED region. However, not all countries enjoyed a positive development and annual average growth rate varied from 20.4% in Estonia to -7.7 in Romania.

Estonia and Poland accounted for the largest share of passenger transport by sea (excluding cruises), followed by Turkey and Cyprus.

Countries with a Baltic Sea coastline (Estonia, Latvia, Lithuania, and Poland), handled more outward than inward cargo, while those with a Black Sea, Adriatic or Mediterranean coastline (Bulgaria, Slovenia, Cyprus, Malta and Turkey) processed more inward than outward cargo.

In 2000, Ventspils (Latvia) was the leading port having handled 34.8 million tonnes, closely followed by Izmit (Turkey) with 31.4 million tonnes and Tallin (Estonia) with 29.2 million.

*The content of this "Statistics in Focus" is based on the results from activities carried out in the framework of the PHARE Multi-Country Statistical Co-operation - Management of Pilot Projects financed by the European Commission.*

*The Pilot Project on Aviation and Maritime transport statistics was carried out to assist the PHARE Candidate Countries in adjusting their statistical system to gradually comply with the EC requirements in this field. The first step in this process was an analysis the existing system and an assessment of its degree of comparability with EU standards and data transmission requirements.*

*Information relating to Candidate Countries other than the PHARE group (Cyprus, Malta and Turkey) has been mainly extracted from the MED-TRANS database which is updated yearly within the framework of the European Commission's statistical co-operation with Mediterranean countries. A more extensive analysis of the major trends in maritime transport in the Candidate Countries is available in Eurostat's Detailed Tables Series under the title "Aviation and Maritime Statistics in the Candidate Countries".*

## Statistics in focus

### TRANSPORT

THEME 7 – 7/2002

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## General developments

In 2000, 41 major ports (with a throughput of over 1 million tonnes a year) in the Candidate Countries handled over 376 million tonnes of cargo by sea. The three MED CCs accounted for 43% of the overall maritime transport with 22 major ports. The Turkish ports handled alone about 39.6% of the total tonnage (149 million tonnes), proving its leading role as a maritime nation. Thanks to the hefty contribution of Ventspils, Latvia operated the largest share of maritime transport within the PHARE Candidate Countries and covered about 13.8% of the total, followed by Poland (12.6%) and Estonia (10.6%). Only seven PHARE Candidate Countries have direct access

to the sea. In passenger figures, Estonia and Poland were the major countries, Estonia handling some 7.5 million passengers in 2000 and Poland some 4.5 million, both substantially larger figures than for any other Candidate Country. Excluding cruises, Turkey handled about 1.2 million passengers and Cyprus 1 million.

There were over 70 thousand vessels calling at ports in the PHARE Candidate Countries in 2000, nearly half of which were accounted for by Poland and another quarter by Estonia. The MED Candidate Countries had about 32 thousand vessels calling at ports.

## Inwards and outwards tonnage and volume handled in the major ports

One noticeable feature was that there was more outward than inward tonnage for countries with a Baltic Sea coastline (Estonia, Latvia, Lithuania, and Poland), while those with a Black Sea, Adriatic or Mediterranean coastline (Bulgaria, Slovenia, Cyprus, Malta and Turkey) processed more inward than outward tonnage. Romania is the only country where the quantities exported by sea (12.3 million tonnes) are more or less the same as the quantities imported (11.6 million tonnes). In some countries the imbalance between the direction of cargo handled can reach as much as 1 to 20. This is the case in Latvia where 49.2 million tonnes were loaded against only 2.5 unloaded. On the other hand, in Turkey 103.7 million tonnes were unloaded against 45.3 million loaded.

Estonia and Lithuania reported substantial volumes of transit tonnage (mostly from Russia and the CIS), over

27 million tonnes for Estonia and almost 16 million tonnes for Lithuania; and it is likely that Latvia also has substantial transit volumes as well although no details were available. Indeed, operations in the ports of the three Baltic States were parallel to those of Belgium and the Netherlands, both sets serving an economic hinterland well beyond the borders of their own countries. Leaving aside Bulgaria, where no information is available at the individual port level, on average, the major port in each PHARE Candidate Country accounted for 69% of total freight tonnage, ranging from 100% for Klaipeda in Lithuania and Koper/Capodistria in Slovenia to 35% for Gdansk in Poland. The concentration of maritime transport in the MED Candidate Country ports was much lower with an average 23%, ranging from 51% for Marsaxlokk in Malta to 21% for Izmit in Turkey.

**Table 2: Maritime transport in the Candidate Countries, 2000**

	Goods (mio tonnes)				Vessels Inward movements	Passengers 1000		Main Port		Number of major ports: More than 1 mio t per year
	Total	Loaded (Exports)	Unloaded (Imports)	Transit		Embarked	Disem- barked	Name	Share of total freight (%)	
Bulgaria	17.8	7.2	10.2	0.4	2 412	:	:	Burgas	:	2
Estonia <sup>(1)</sup>	39.8	9.4	3.3	27.1	14 159	2 683	3 509	Tallinn	73	5
Latvia <sup>(2)(3)</sup>	51.8	49.2	2.5	:	6 801	13	13	Ventspils	67	3
Lithuania	22.7	4.9	2.3	15.5	7 253	52	54	Klaipeda	100	1
Poland <sup>(2)(4)</sup>	47.3	31.5	15.8	:	35 238	2 205	2 260	Gdansk	35	5
Romania	25.5	12.3	11.8	1.4	4 874	:	:	Constantza	90	2
Slovenia <sup>(2)</sup>	9.0	2.4	6.7	:	2 368	18	19	Koper / Capodistria	100	1
<b>All PHARE CCs<sup>(5)</sup></b>	<b>213.9</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>73 105</b>	<b>:</b>	<b>:</b>		<b>69</b>	<b>19</b>
Cyprus	7.4	1.6	5.3	0.5	5 289	517	518	Limassol	47	3
Malta <sup>(2)(4)</sup>	5.7	0.6	5.1	:	5 372	:	:	Marsaxlokk	51	2
Turkey <sup>(6)</sup>	149.0	45.3	103.7	:	21 737	617	626	Izmit	21	17
<b>All MED CCs</b>	<b>162.1</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>32 398</b>	<b>:</b>	<b>:</b>		<b>23</b>	<b>22</b>
<b>All CCs</b>	<b>376</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>105 503</b>	<b>:</b>	<b>:</b>		<b>48</b>	<b>41</b>

<sup>(1)</sup> The passenger figures for Estonia are for international passengers only.

<sup>(2)</sup> The figures for goods loaded and unloaded for Latvia, Poland, Slovenia, and Malta include transit traffic.

<sup>(3)</sup> For Latvia, the figures for vessel movements are for the three major ports Riga, Ventspils and Liepaja only while those for passengers are for Riga only.

<sup>(4)</sup> For Poland and Malta the number of inwards vessels is estimated (total divided by two) and for Malta this is 1999 data.

<sup>(5)</sup> The all PHARE countries figure for the share of total freight accounted for by the main ports excludes Bulgaria.

<sup>(6)</sup> The figures provided here for Turkey concern only the major ports.

## The top-15 ports in the Candidate Countries

The list of the top-15 ports in terms of cargo turnover (Table 1) features six ports which handled more than 20 million tonnes of cargo in 2000. The leading port is Ventspils (Latvia) with 34.8 million tonnes, closely followed by Izmit (Turkey) with 31.4 million tonnes and Tallinn (Estonia) with 29.2 million. The performance reached by these ports is strongly characterised by an important volume of oil products.

Latvia is represented by two ports (Ventspils and Riga) while Poland has four (Gdansk, Szczecin, Swinoujscie and Gdynia) and Turkey has five (Izmit, Aliaga,

Istanbul, Mersin and Iskenderun). Each PHARE country's major port for maritime transport is included in the top-15 list, with the exception of Burgas in Bulgaria where no port level information is available. On the other hand, the largest port in terms of cargo transport in Cyprus (Limassol with 3 million tonnes) and in Malta (Marsaxlokk with 2.9 million tonnes) do not appear within the top-15.

If the ports were ordered in terms of passenger figures, Tallinn in Estonia and Swinoujscie in Poland would certainly figure at the top of the list.

## Trends in maritime transport 1995-2000

In terms of maritime cargo, the PHARE Candidate Countries as a whole registered an average annual increase of 3.3%, growing from 182 million tonnes handled in 1995 to 214 million tonnes in 2000. However, not all countries enjoyed a positive development. Estonia recorded the highest rise over the five years with an average annual growth rate of 20.4%, while Lithuania recorded 12.3% and Latvia and Slovenia around 6%. In contrast, cargo volumes for Poland remained stable while Bulgaria (-3.7) and Romania (-7.7) suffered declines. The buoyant performance of the three Baltic States owed much to the strong developments in the Russian economy while Slovenia benefited from the progress of Koper/Capodistria as a point of entry for many Central European countries. The problems faced by Bulgaria and Romania reflect in part the difficulties in neighbouring Balkan states and, in the case of Romania, the consequential disruption of traffic on the Danube.

Looking at the situation for passengers, the major

passenger PHARE Candidate Countries, Poland and Estonia, achieved growth. In the case of Poland, this reached an average of 35% per year over the period, probably reflecting Poland's success in capitalising on the end of 'duty free' on intra-EU routes. This may also help to explain the continued growth in Estonian figures. The surprise was the growth of 12.7% per year achieved by Lithuania although this was from a very low base. The limited information for vessel movements shows that Poland recorded an annual average rise of 19.4% over the period while Estonia achieved 11% and Slovenia 8.7%.

Among the MED Candidate Countries, Turkey and Malta saw their volume of maritime cargo grow over the five years recording respectively a 7.2% and 1.5% annual average rise. Cyprus experienced a negative trend at an average rate of -3.2% per year. At the same time, Turkey and Malta saw their passenger numbers decline, while Cyprus benefited from a 5.6% average annual increase mostly induced by the expansion of tourism-related activities.

**Table 3: Development of maritime transport in the CC's between 1995 and 2000 (major ports only)**

	Total of gross weight of goods			Total number of passengers excl. cruise (1000)			Number of vessel movements (inwards)		
	1995	2000	Average Annual Growth %	1995	2000	Average Annual Growth %	1995	2000	Average Annual Growth %
Bulgaria <sup>(1)(2)</sup>	21.5	17.8	-3.7	:	:	:	3 652	2 412	-8.0
Estonia <sup>(2)</sup>	15.7	39.8	20.4	5 343	7 432	6.8	8 405	14 159	11.0
Latvia <sup>(3)</sup>	38.9	51.8	5.9	33	26	-5.7	:	6 801	:
Lithuania	12.7	22.7	12.3	58	106	12.7	6 931	7 253	0.9
Poland	48.2	47.3	-0.4	989	4 465	35.2	14 541	35 238	19.4
Romania	38.0	25.5	-7.7	-	-	-	:	4 874	:
Slovenia	6.8	9.0	5.8	40	38	-1.3	1 557	2 368	8.7
<b>All PHARE CCs <sup>(5)</sup></b>	<b>181.8</b>	<b>213.9</b>	<b>3.3</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>73 105.0</b>	<b>:</b>
Cyprus <sup>(4)</sup>	8.7	7.4	-3.2	787	1 035	5.6	4 743	5 289	2.2
Malta <sup>(5)(6)</sup>	5.2	5.7	1.5	228	217	-0.8	:	5 372	:
Turkey <sup>(7)</sup>	109.5	155.1	7.2	1 848	1 280	-7.1	:	21 737	:
<b>All MED CCs</b>	<b>123.4</b>	<b>168.3</b>	<b>6.4</b>	<b>2 863</b>	<b>2 531</b>	<b>-2.4</b>	<b>:</b>	<b>32 398</b>	<b>:</b>
<b>All CCs</b>	<b>305</b>	<b>382</b>	<b>4.6</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>:</b>	<b>105 503</b>	<b>:</b>

<sup>(1)</sup> 1996 data for gross weight of goods and vessel movements for Bulgaria instead of 1995. <sup>(2)</sup> Bulgarian and Estonian figures for gross weight of goods include the tare weight of containers and ro-ro units. <sup>(3)</sup> Latvia: 1996 figures for passengers and for the port of Riga only. <sup>(4)</sup> For Cyprus the number of passengers includes cruise passengers. <sup>(5)</sup> Malta: 1999 vessel data. <sup>(6)</sup> For Malta 1994 data instead of 1995 and the data excludes cruise passengers. The number of cruise passengers is nevertheless relevant for Malta (for the year 2000 = 167810). <sup>(7)</sup> Figures on gross weight of goods and passengers concern all Turkish ports in this table.

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