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**Northern Periphery and
Arctic Programme**
2014–2020



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Baltic Sea and the Arctic Seas – current shipping volumes and future trends

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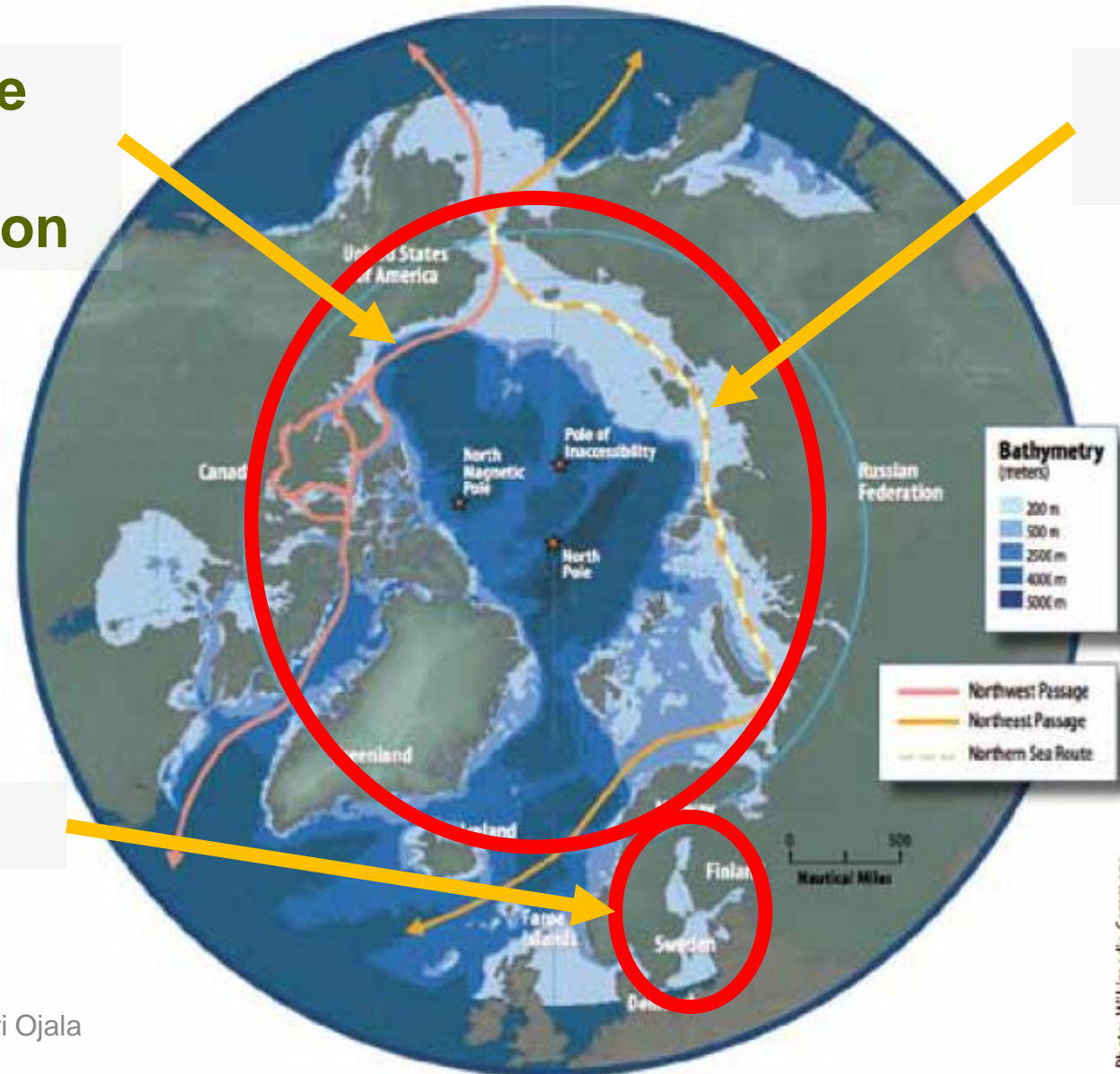


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This presentation focuses on commercial shipping in the Baltic Sea and the Arctic Seas

North West Passage (NWP)
Not in this presentation

Northern Sea Route (NSR)



The Baltic Sea

First, the Northern Sea Route

NWP and NSR potential transcontinental shortcuts

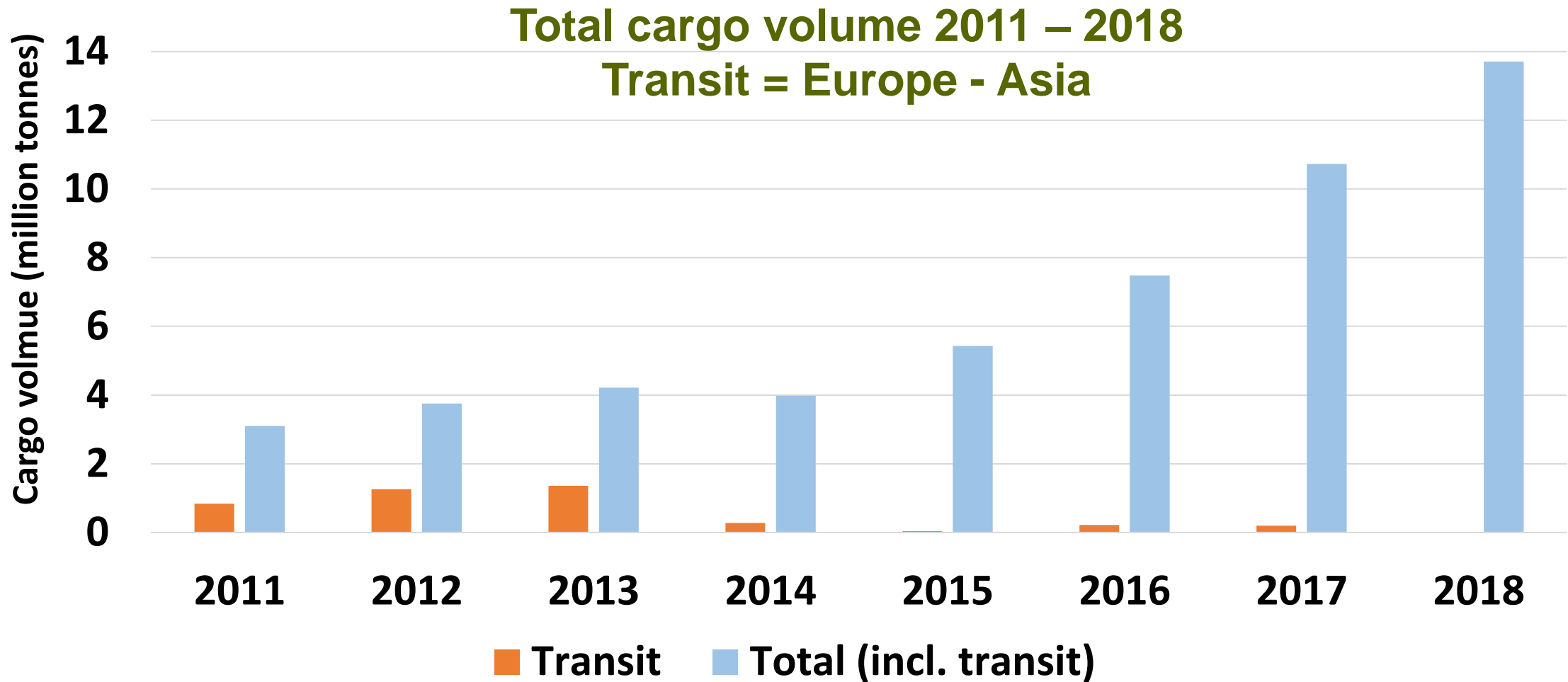


Potential of the NSR; in principle, it provides:

- **A substantially shorter nautical distance between several Asian and Continental European ports**
 - *E.g. b/w Yokohama and Hamburg \approx 40 % shorter*
- **Arctic shipping options circumventing e.g. the Suez Canal, if the ice coverage continues to diminish**
 - *This timeframe is decades rather than years*
- **Recent growth in cargo volumes**
 - *But exclusively for Russian destination cargoes*

The NSR: almost exclusively Russian cargoes

Total volumes very small, < 20 million tonnes



The Baltic Sea: One of the busiest seas in the World

- Close to 10 % of worldwide shipping in:
 - Vessel movements
 - Cargoes
- >20 % of international passengers in shipping (before COVID-19)
- Worldwide shipping volume 2021 10.7 billion tonnes
 - ~0.9 billion tons in the Baltic Sea (~ 9 %)
 - NSR < 20 million tonnes (< 0.2 %)



Source: [HELCOM](#)

Future trends of shipping volumes

- Russia's attack on Ukraine has changed the scene significantly
- NSR even less likely a conduit for cargo movements
- Cargo flows in the Baltic Sea heavily affected
 - The total cargo volumes may not change that much
 - Shipping to and from Russia dramatically less in the short term
 - Longer routes on main dry and liquid commodities

Conclusion, the next 10 to 20 years

- Shipping activity in the Baltic Sea remains high
 - Probability of a major shipping accident is relatively high especially in crossing shipping lanes (e.g. Gulf of Finland, Danish straits)
- Shipping activity in Arctic waters going down
 - Likelihood of an event low, but if something happens, the impact on the natural environment could be significant
- Arctic routes (NWP and NSR) remain marginal for decades



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