
Impact analysis of the Port of Gdańsk

on the economy of the city,
region and country



PORT
GDAŃSK



Key figures

Scale of operations

77.4 million tonnes
cargo throughput at the Port
of Gdańsk in 2024

58%
Port of Gdańsk's share of cargo
throughput at Poland's largest seaports
in 2024

1st place
the largest container port
in the Baltic Sea

3,559
merchant ships
served in 2024

21
number of countries with which the Port
of Gdańsk maintains regular shipping links

PLN 7 billion
value of key investments underway
within the Port of Gdańsk
at the date of this report

PLN 1.5 billion
value of capital expenditure
incurred by ZMPG S.A.
between 2015 and 2024

PLN 44.6 billion
total amount of taxes collected
in connection with the handling of cargo
passing through the Port in 2024

approx. 16 thousand
estimated number of people working
at the Port of Gdańsk

approx. 700
businesses operating
within the Port

Economic impact

83,714
jobs secured
in the Polish economy

47,738
jobs created
in the Pomorskie Voivodeship

15,241
jobs created in Gdańsk

69.8 thousand
households supported
by employment at the Port

PLN 8.1 billion
household income of people working
at the Port and in the surrounding area

PLN 20.5 billion
value added generated
in the Polish economy

PLN 3.7 billion
value added
generated in Gdańsk

PLN 8.8 billion
tax revenue generated
nationwide

PLN 614 million
total amount of local taxes generated
in the Pomorskie Voivodeship

PLN 261 million
total amount of local taxes generated
and paid into the City of Gdańsk
budget



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Glossary

ZMPG S.A.

Zarząd Morskiego Portu Gdańsk Spółka Akcyjna (Port of Gdańsk Authority S.A.) was established in 1997 under the Act on Seaports and Harbours as the managing authority of a port of vital importance to the national economy. The company operates in accordance with the provisions of the Commercial Companies Code, unless the Act on Seaports and Harbours provides otherwise. The company's operations are of a public utility nature. Its shareholders are the State Treasury, the Municipality of Gdańsk and the employees. The State Treasury remains the majority shareholder by law.

ZMPG S.A. Group

The ZMPG S.A. Capital Group comprises the parent company and its subsidiaries, which jointly carry out tasks relating to the management and operation of the Port of Gdańsk.

Structure of the ZMPG Group:

- Parent company: Zarząd Morskiego Portu Gdańsk S.A. (ZMPG S.A.)
- Subsidiaries: Port Gdański Eksploatacja S.A. (PGE S.A.), Przedsiębiorstwo Usług Portowych Rezerwa Sp. z o.o. (P.U.P. Rezerwa Sp. z o.o.) and Straż Ochrony Portu Gdańsk Spółka z o.o. (in liquidation)
- Associate: Polski PCS Spółka z o.o.
- Indirect associate (through PGE S.A.): CARGOFRUIT Spółka z o.o.

Port of Gdańsk, Port of Gdańsk Area

The Port of Gdańsk (Port) is situated in Gdańsk Bay, at the mouth of the Martwa Wisła river. It is a general-purpose port, as it handles all types of cargo. The Port consists of two main sections: the inner port and the outer port. The inner port is situated along the Martwa Wisła and the port channel, whilst the outer port is situated directly in the waters of Gdańsk Bay. The outer port includes deep-water terminals capable of receiving and handling all vessels that can navigate through the Danish straits into the Baltic Sea.

The Port of Gdańsk Area covers a total of approximately 15,986 hectares, of which water bodies (including

part of the waters of Gdańsk Bay) account for approximately 13,746 hectares, and land areas for approximately 2,240 hectares. Of this, 691 ha of land is held under perpetual usufruct by the Port of Gdańsk Authority. The boundaries of the Port are defined in the Regulation of the Minister of Transport, Construction and Maritime Economy of 29 May 2012 on the determination of the boundaries of the Port of Gdańsk from the sea, the roadstead and the land (Journal of Laws of 2012, item 650, as amended).

Port sector

The port sector encompasses the use of port infrastructure and the provision of port services within the Port or on the waterway providing access to the Port, including bunkering, cargo handling, mooring, passenger services, the collection of ship-generated waste and cargo residues, pilotage and towing. This sector operates under the supervision of maritime authorities, in particular maritime offices.

AFIR

'AFIR' (*Alternative Fuels Infrastructure Regulation*) refers to Regulation (EU) 2023/1804 of the European Parliament and of the Council of 13 September 2023 on the deployment of alternative fuels infrastructure, and repealing Directive 2014/94/EU. The entry into force of the individual provisions of Regulation 2023/1804 is being phased in between 12 October 2023 and 31 December 2035. It is a directly binding and directly applicable act of EU law, aiming to create a coherent, interoperable and accessible infrastructure for alternative fuels throughout the European Union.

CER

'CER Directive' (*Critical Entities Resilience Directive*) refers to Directive (EU) 2022/2557 of the European Parliament and of the Council of 14 December 2022 on the resilience of critical entities and repealing Council Directive 2008/114/EC. It entered into force on 16 January 2023, and the deadline for its transposition ended on 17 October 2024. The aim of the CER Directive is to reduce the vulnerability to threats and strengthen the physical resilience of critical entities in the European Union, with a view to ensuring the uninterrupted provision of services

that are essential to the economy and society as a whole. Furthermore, the directive promotes the enhancement of the resilience of critical entities providing these services.

GUS

Główny Urząd Statystyczny (Statistics Poland) – the central government agency responsible for collecting, processing, and publishing statistical data in Poland).

NIS2

The 'NIS2 Directive' (*Network and Information Security Directive 2*) refers to Directive (EU) 2022/2555 of the European Parliament and of the Council of 14 December 2022 on measures for a high common level of cybersecurity across the Union, amending Regulation (EU) No. 910/2014 and Directive (EU) 2018/1972, and repealing Directive (EU) 2016/1148. It entered into force on 16 January 2023, and the deadline for its transposition expired on 18 October 2024.

OPS

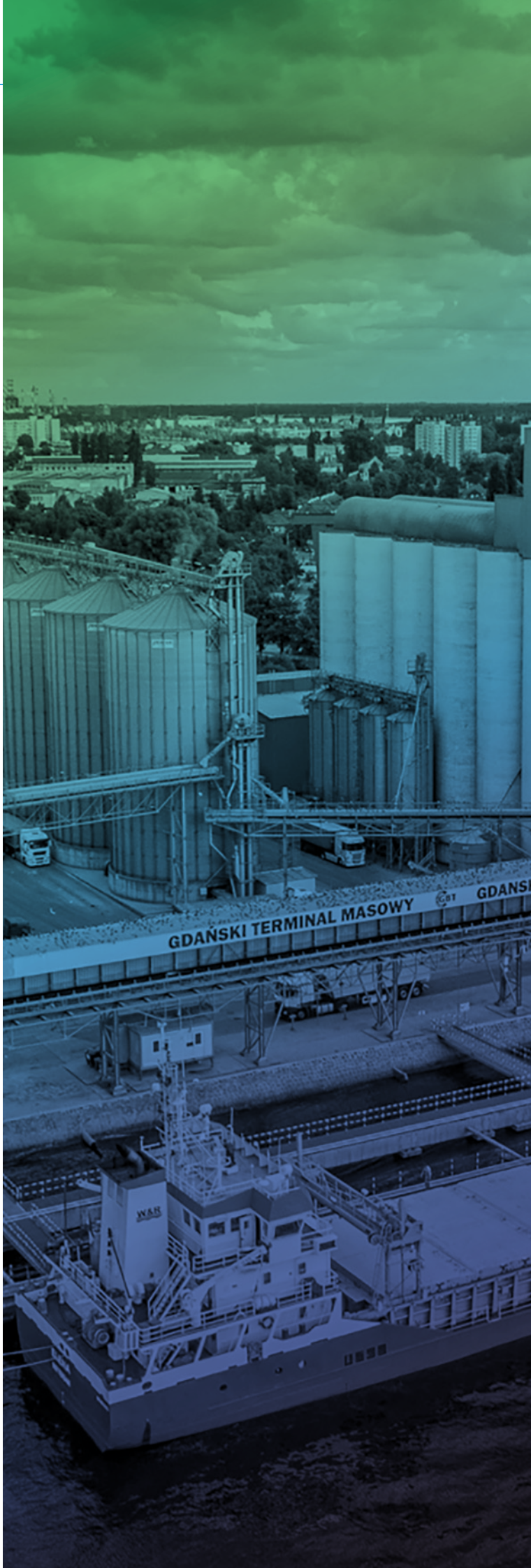
Onshore Power Supply (OPS) is a technology that enables ships to draw electricity from the onshore grid whilst berthed in port, rather than using their own engines. The purpose of the OPS system is to reduce greenhouse gas emissions and improve air quality in seaports.

TEN-T

'TEN-T' (Trans-European Transport Network) refers to the trans-European transport network, which comprises the European transport corridors of the highest strategic importance. The requirements to be met for the development and implementation of the trans-European transport network infrastructure are set out in Regulation (EU) 2024/1679 of the European Parliament and of the Council of 13 June 2024 on Union guidelines for the development of the trans-European transport network, amending Regulations (EU) 2021/1153 and (EU) No 913/2010 and repealing Regulation (EU) No 1315/2013.

TEU

'TEU' (*Twenty-foot Equivalent Unit*) refers to a standard unit of measurement for container capacity in maritime transport, equivalent to a 20-foot container. It is used to determine the throughput of container terminals and the capacity of container ships.



Introduction

Seaports are a key link in the logistics chain, serving as the point where global trade routes meet the national transport infrastructure. Their development is of fundamental importance, both for ensuring energy and food security and for the smooth functioning of entire sectors of the economy that depend on the imports of raw materials and on the ability to export domestic products.

The operation of ports not only facilitates the physical flow of goods but also generates added value and revenue for national and local government budgets, supporting the development of public services and infrastructure. Furthermore, port operations influence the competitiveness of the economy, attract investment and create jobs both within the ports themselves and in related sectors. This is why it is so important to understand the role of ports in the modern world, their significance for the development of the national, regional and local economy, and the links and relationships that ports create throughout the value chain.

In this context, the Port of Gdańsk plays a particularly important role as Poland's largest seaport and one of the key logistics hubs in the Baltic Sea region. Its strategic location, dynamic infrastructure development and growing importance in international trade mean that it is not merely a logistics hub, but also a key growth driver for Gdańsk, Pomorskie and the national economy as a whole. In the face of the changing geopolitical landscape, including the war in Ukraine and the need to diversify the sources of raw material supplies, the Port of Gdańsk is gaining importance as an indispensable component of Poland's trade security and defence. Simultaneously, in the era of the energy transition, the Port is becoming a vital link in building Poland's

sustainable development in the long term. All this means that the Port of Gdańsk is growing in stature, and its role in Poland's economic system is becoming increasingly multifaceted.

This document aims to provide a comprehensive analysis of the Port of Gdańsk's operations and their impact on the national, regional and local economies. The first part of the report describes the methodological approach, including the analysed entities, subject matter and methodology, as well as the research tools and data sources used. The second chapter of the report discusses the Port of Gdańsk and its environment, presents the characteristics of the Port's operations and identifies the key stakeholders involved. The third chapter presents the development of the Port of Gdańsk, including an analysis of cargo turnover and capital expenditure in recent years. The fourth chapter presents the results of an analysis of the Port of Gdańsk's economic impact in three areas: the labour market and employment, value added and GDP, and public finances, carried out using the Leontief model. This chapter also discusses the role of the Port of Gdańsk in facilitating Poland's foreign trade. The fifth chapter contains an analysis of the trends shaping the Port's development and operations, as well as examples of best practice from other countries. The sixth chapter presents a number of recommendations aimed at enhancing the social and economic impact of the Port's activities, based on the research carried out. The report concludes with a summary of the key findings from the analysis.

Methodology



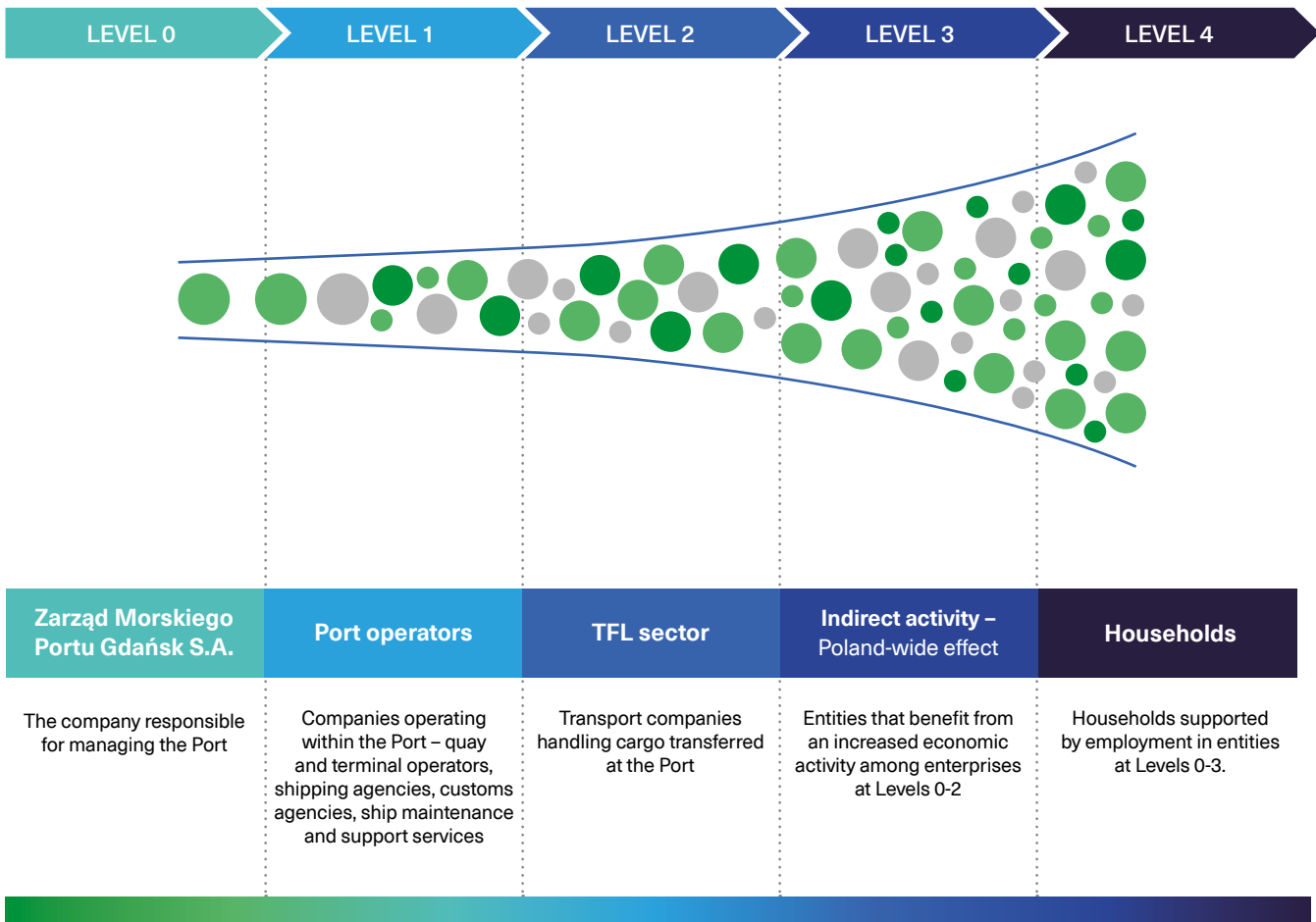
Analysed entities

The analysis is based on a **five-level model of the Port of Gdańsk's impact** and covers stakeholders who are significant from the perspective of logistics flows within the Port of Gdańsk Area.

Within the administrative boundaries of the seaport of Gdańsk, as defined by the Regulation of the Minister of Transport, Construction and Maritime Economy of 29 May 2012 on the determination of the boundaries of the Port of Gdańsk from the sea, the roadstead and the land (Journal of Laws of 2012, item 650, as amended (hereinafter: 'Port of Gdańsk

Area', 'Port of Gdańsk'), a number of other entities (including shipyards, petrol stations and sports clubs) identified in this report also operate, although they do not participate directly in cargo handling operations. Therefore, in the first phase of the study, a database of potential stakeholders was compiled, based on which five stakeholder groups have been defined in terms of the levels of impact, the characteristics of which are presented below.

Fig. 1. Classification groups of entities within the direct area of influence of the Port of Gdańsk



Subject matter of the analysis

The study is focused, on the one hand, on the characteristics of the Port of Gdańsk's operations, including the scale of its activities and the identification of the Port's key stakeholders, and, on the other hand, on the Port of Gdańsk's impact on the economy and the labour market at four territorial levels: the city of Gdańsk, the Tri-City, the Pomorskie Voivodeship and the whole of Poland.

The assessment of the Port of Gdańsk's impact takes into account measurable economic effects – gross value added (impact on GDP), employment, tax revenues and share in foreign trade. The results are presented in terms of levels and avenues of impact, providing a comprehensive picture of the Port's significance within the entire economic ecosystem.

1 Labour market

The analysis examines direct employment at ZMPG S.A. and port operators (Levels 0–1), as well as employment in the transport, storage and logistics sector resulting from the handling of goods handled at the Port (Level 2), and the wider impact of the Port's activities on the labour market across Poland (Level 3). The structure and dynamics of employment during the analysed period have been assessed, along with the relationships between direct, indirect and induced employment. In addition, the number of people in households supported by Port-related work has been determined (Level 4). This made it possible to calculate employment intensity indicators – including the number of jobs generated for every PLN 1 million invested – and to compare the scale of employment at the Port with that of other sectors of the economy.

2 Economic growth

The gross value added and contribution to GDP generated by port operators and related sectors were estimated. The effects were then attributed to specific levels of impact and geographical areas.

Both nominal values and their percentage share of the city's, region's and country's economy are presented.

3 Public finances

The tax revenues and fees associated with the Port of Gdańsk and businesses in its vicinity have been analysed, broken down into the central government budget (VAT on imports, excise duty, PIT, CIT), the voivodeship-level budget and Gdańsk's budget (PIT, CIT, property tax). In this way, the total fiscal contribution of the Port and its surrounding area has been presented, and it is indicated what proportion of the revenue goes to local and regional authorities and what proportion goes to the state budget.

4 Foreign trade and investment

In this area, the Port of Gdańsk's share of Poland's foreign trade has been determined in terms of value and tonnage, broken down into exports and imports. The value of exports and imports has been obtained from the National Tax Administration (KAS) and covers goods subject to customs declarations on import and export.



Research methods and data sources

The basis for quantifying the Port's economic impact was the **input-output**, also known as the **Leontief model**, which allowed three categories of effects to be identified: direct (reflecting the impact of primary expenditure by ZMPG S.A., all port enterprises, or solely entities from the TFL sector on the economic activity of the city of Gdańsk, the Pomorskie Voivodeship and Poland as a whole), indirect (reflecting the impact of increased economic activity among all sub-suppliers to whom the initial expenditure of ZMPG S.A., all port enterprises or exclusively entities from the TFL sector was directed) and induced (demand generated by the income of households maintained throughout the supply chain). Presented below are the research methods used in the preparation of this report.

1 Desk research

This method served as the basis for describing the Port's economic environment and analysing trends in cargo handling, capital expenditure and employment.

As part of the desk research, secondary statistical data (GUS, Eurostat, GUS Statistical Yearbook of the Maritime Economy), industry reports, strategic documents and financial statements of port companies were collected and analysed. The Dun & Bradstreet database, supplemented by the EMIS database, was used to obtain and process the companies' financial data, enabling the effective construction of a comprehensive picture of the performance of enterprises involved in port operations.

The study also draws on data provided by the Port of Gdańsk Authority S.A. regarding the company's financial statements for the years 2015–2024, cargo handling volumes at the Port of Gdańsk in the years 2015–2024, and data obtained from the National Tax Administration concerning the amounts of revenue from customs duties, VAT and excise duty collected in 2017–2024 by the Customs Branches located at the Port of Gdańsk, and regarding customs declarations for imports and exports at the Port of

Gdańsk (including the number of items, gross weight and value of goods in PLN) in 2020–2024.

In order to obtain as comprehensive a picture as possible for the activities of the Port of Gdańsk and its economically linked entities, a dataset obtained from Statistics Poland (GUS) covering data on entities operating, in particular, in sectors classified under Section H – Transport and warehousing, including cargo handling (PKD 52.24), support services for maritime transport (PKD 52.22), warehousing and storage of goods (PKD 52.22), was supplemented with information from publicly available sources, i.e. industry websites, directories of exhibitors at trade fairs and conferences (e.g. the TransLogistica Poland International Transport and Logistics Fair or Transport Logistic in Germany), whilst data on entities operating within the administrative boundaries of the Port of Gdańsk were verified and supplemented using publicly available sources, including location data from Google Maps, as well as data in the address directory on the Port of Gdańsk website.

The information obtained in this way made it possible to determine the structural composition of the port sector and to prepare the input data for the Leontief model.

2 Interviews and consultations by telephone

Conducted with representatives of ZMPG S.A., the Gdańsk Economic Development Agency, the Port's business partners and port-related institutions. These enabled us to fill in gaps in the data, verify quantitative results and gather expert knowledge regarding the cargo handling processes at the Port of Gdańsk and investment projects within the Port Area.

3 The Leontief model (input-output)

Used to quantify the economic impact of the Port of Gdańsk's activities. The input data included, amongst other things, the financial results of port companies (sourced from Dun & Bradstreet, EMIS and sources provided by ZMPG S.A.) and employment data. The model enabled the estimation of direct, indirect and induced effects in terms of value added, GDP, employment and tax revenue. The model's results form the basis for analyses of the Port's contribution to the national, regional and local economies.

Detailed assumptions regarding the economic impact analysis and the Leontief model are described in Annex 1 to this report.



Port of Gdańsk and its surroundings



Overview of the Port of Gdańsk's operations

The Port of Gdańsk is the largest seaport in Poland and one of the most important in Central and Eastern Europe (CEE). Its strategic location on the Baltic Sea and access to global trade routes make it a key logistics hub in the CEE region. It plays a significant role in the national, regional and local economy, contributing to the development of many sectors.

The Port of Gdańsk occupies a total area of approximately 15,986 hectares, of which water bodies (including part of the waters of Gdańsk Bay) account for approximately 13,746 hectares, and land areas for approximately 2,240 hectares. Of this, the Port of Gdańsk currently uses approximately 691 hectares of land for its operations. The length of operational quays in the Port of Gdańsk is approx. 26 km. They are located within the so-called inner port and outer port areas. Within the boundaries of the inner port, situated along the Martwa Wisła and the port canal, there are, amongst other things, quays for the handling of general cargo, bulk goods and vehicles, a ferry and passenger terminal and a Ro-Ro terminal, as well as the quays of the Free Zone. The outer port, on the other hand, comprises the fuel, coal, LPG and ore piers, as well as the container terminal, situated directly in the waters of Gdańsk Bay. **This allows the largest vessels with a draught of up to 15 m, a capacity of over 24,000 TEU, and a length of up to 400 m to call at the Port.** In this section, dredging of the water area is underway to build a terminal intended to serve as an installation base for the construction of offshore wind farms. The outer port area also houses a liquid fuel depot, handling deliveries of raw materials to both Polish and foreign refineries. This is one of the key elements of the infrastructure guaranteeing Poland's energy security.

Zarząd Morskiego Portu Gdańsk S.A. (ZMPG S.A.) has been managing the Port since 1998, continuing the previous management model under a new organisational and legal structure. The Company's shareholders are the State Treasury, the Municipality

The Port of Gdańsk occupies

2,240 ha
of land

13,746 ha

of water (including the waters of Gdańsk Bay)

26 km

length of operational quays in the Port of Gdańsk

of Gdańsk and eligible employees. In this report, in the section analysing the economic impact, ZMPG S.A. is classified as Level 0. It is worth noting here the distinction between ZMPG S.A. and the Capital Group of Port of Gdańsk Authority S.A., which, in addition to ZMPG S.A. (the parent company), also comprises subsidiaries and associates. The subsidiaries include: Port Gdański Eksploatacja S.A. (PGE SA), which provides port services in the field of handling, warehousing and storage of goods; Przedsiębiorstwo Usług Portowych Rezerwa Sp. z o.o. (P.U.P. Rezerwa Sp. z o.o.), responsible for activities supporting the port's operations; and Straż Ochrony Portu Port of Gdańsk Sp. z o.o. currently in liquidation. The Group also comprises the following associates: Polski PCS Sp. z o.o. and CARGOFRUIT Sp. z o.o., the latter being an indirect associate via PGE S.A.

The Port Authority (ZMPG S.A.) is responsible for the maintenance and development of the port infrastructure, including quays, terminals and port transport systems, as well as for coordinating vessel traffic. It also handles customer relations and the acquisition of new clients, including shipping lines and quay operators, and coordinates cooperation between numerous entities which, whilst not always directly involved in cargo handling operations, are an essential part of the port infrastructure. These include entities supplying ships with fuel, provisions and other on-board supplies, all replenished during port calls; those receiving ballast water and waste discharges; and those ensuring fire safety and the physical protection of property within the Port, as well as cybersecurity. The Port Authority is therefore a fundamental element of the logistics and transport operational chain, ensuring the smooth functioning of the entire port system.

Baltic Hub Container Terminal

A deep-water container terminal designed to handle the loading and unloading of the world's largest container ships.

The Baltic Hub terminal is currently being expanded to include

Quay T5,

which will serve as an installation terminal for the construction of offshore wind farms in the Baltic Sea.

The most characteristic aspect of the Port's operations is cargo handling, carried out by terminal and quay operators (operating companies) in collaboration with individuals and entities responsible for moving cargo from the ship to the quay and subsequently to a storage yard or warehouse. Over 30 operating companies are active in the Port of Gdańsk, operating on the quays of the inner and outer port, including Baltic Hub, Naftoport, Gaspol, PPS Port Północny, Port Gdańsk Eksploatacja and Gdańskie Młyny. It is their development that largely determines the Port's cargo handling capacity.

The range of goods handled at the port is very wide, and individual companies specialise in different types of cargo. For example, the Oliwa Quay serves general cargo and roll on / roll off vessels. Grain is also handled there. Located within the inner port, the Nabrzeże Obrońców Polskiej Quay is designed for the unloading of bulk cargo, both dry and liquid. It is equipped with pipeline handling facilities connected to onshore tanks and railway sidings. Passenger and car ferries, in turn, are handled by the Westerplatte Ferry Terminal. It is equipped with both ramps for loading and unloading vehicles and a gangway connecting the ship to the passenger terminal. The quays located in Basen Górniczy (Ore, Coal and Administration) are designed for the handling of coal, coke, scrap metal and steel products, as well as aggregates, timber and bulk materials. The company Port Gdańsk Eksploatacja, which operates at these quays, has at its disposal, among other things, mobile equipment for handling scrap metal, general cargo and bulk goods.

An important and widely recognised part of the Port of Gdańsk is the deep-water container terminal, known as the Baltic Hub Container Terminal (hereinafter: Baltic Hub). The terminal is designed to handle the loading and unloading of the world's largest container ships. The quays at Baltic Hub (T1, T2 and the newly built T3) are used in particular for unloading ships operating on regular ocean-going routes, served by the world's largest shipping lines, including those belonging to the Ocean Alliance (CMA CGM, COSCO, Orient Overseas Container Line [OOCL – a Cosco group company] and Evergreen), Maersk and MSC, as well as the independent CMA CGM FAL 1 service. The quays are equipped with several dozen cranes of various types and connections for reefer containers, and there is also an operational railway siding within the terminal (7 tracks with a total length of 5.25 km¹).

The Baltic Hub terminal is currently being expanded to include Quay T5, which will serve as an installation terminal for the construction of offshore wind farms in the Baltic Sea. Handling quays and a storage and manoeuvring area covering approximately 12 hectares will be built there. Istrana Spółka z o.o. is responsible for the project's implementation; its partners are Baltic Hub Container Terminal Spółka z o.o. and the PFR FIZAN fund.

Crucial to Poland's energy security is the liquid fuel handling facility, which has 5 berths for handling of crude oil and petroleum products. These are located in the waters of Gdańsk Bay and are equipped with spill containment barriers, a mooring line tension monitoring system, installations for measuring and monitoring vessel navigation parameters, and a fire protection system. This section of the Port is connected to a network of pipelines and handling facilities belonging to the Oil Pipeline Operating Company (PERN) and the Gdańsk Refinery, enabling the direct supply of fuels both to domestic refineries and processing plants, as well as to the eastern German states. These facilities are owned by Naftoport Spółka z o.o.

Poland's and the region's energy security is also bolstered by the liquefied petroleum gas (LPG) transfer terminal, located in the outer port on a site occupying approximately 11 hectares. It is designed to receive, store, partially blend and distribute propane-butane gas. It comprises 16 tanks with

¹ Data from the Port of Gdańsk website, Baltic Hub Container Terminal: <https://www.portgdansk.pl/port/terminale-i-nabrzeza/terminal-kontenerowy-baltic-hub/> (accessed: 26 September 2025).

Port of Gdańsk Area map



The map uses dots to indicate the locations of port operators whose activities are essential to the operation of the Port of Gdańsk.



3559

MERCHANT SHIPS
PER YEAR



3287

HEAVY GOODS
VEHICLES
PER DAY



977

WAGONS
PER DAY

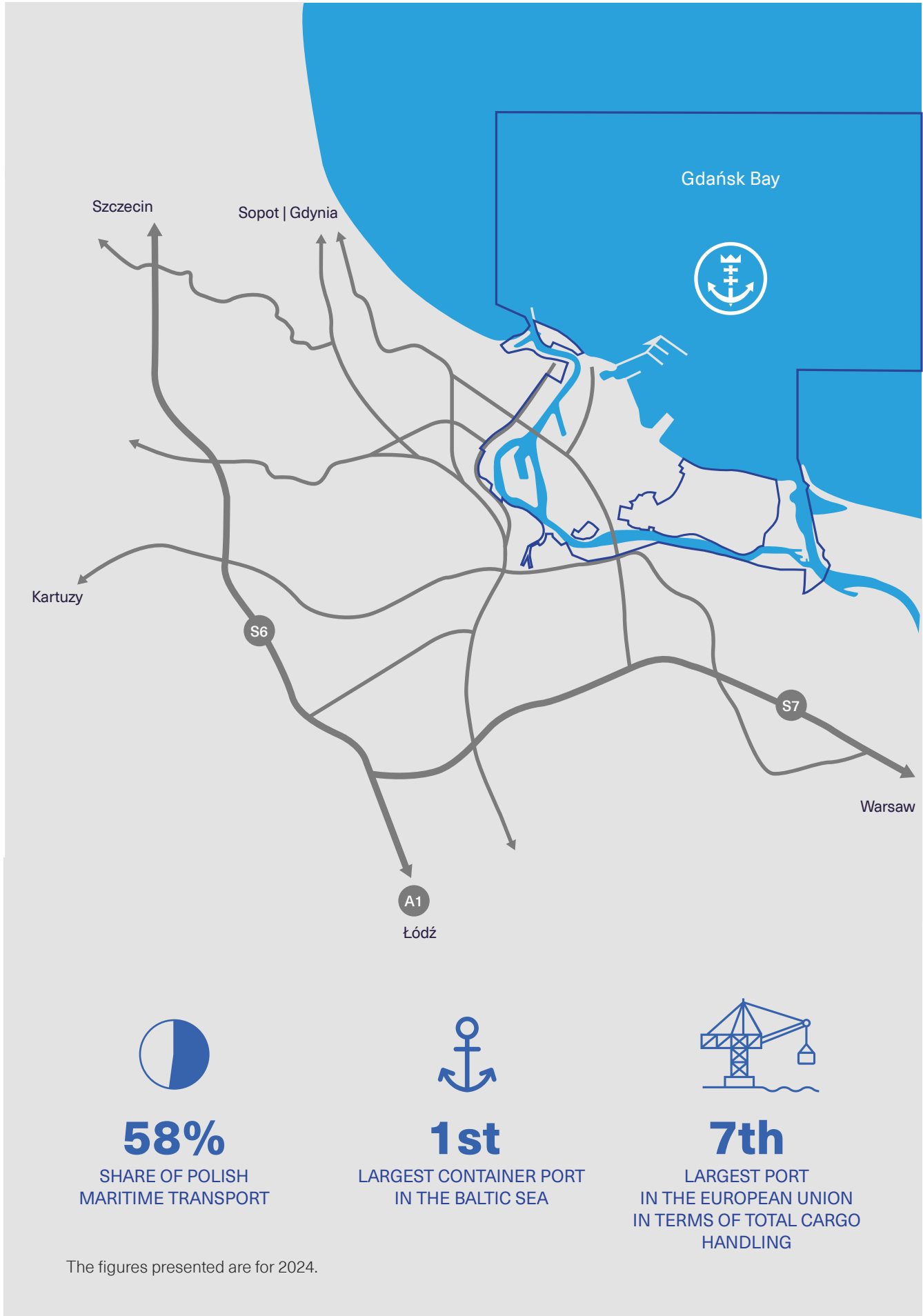


approx.

700

BUSINESSES
OPERATING WITHIN
THE PORT AREA

The figures presented are for 2024.



a storage capacity of approx. 13,200 tonnes, and is maintained by Gaspol S.A. Gdańsk Gas Terminal.

The port also handles the transfer of vehicles delivered by sea (imports) or rail (exports), foodstuffs, sulphuric acid and many other goods.

Another important part of the Port is the Free Zone (WOC), which facilitates the transfer of goods in transit and so-called outward processing, as governed by the provisions of the Union Customs Code and other implementing regulations. Several operators are active within the WOC, supervised by the Port of Gdańsk Authority and the competent customs and tax authorities.

These customs and tax authorities are key stakeholders of the Port, and without their involvement, the current goods turnover would not be possible. Their work is complemented by other services and administrative bodies, such as the Border Guard and the State Sanitary Inspectorate. To gain a better understanding of the number of entities and individuals involved even in basic transfer and logistics operations, it is worth analysing the handling processes for selected cargoes outlined on the following pages. With the rise of the digital economy and modern technologies, certain operations, carried out, for example by shipping agents, freight forwarders, surveyors and insurers, are now conducted remotely. Some of these entities have offices within the Port or in its vicinity and also participate physically in certain processes related to the loading and unloading of goods. The following organisations operate within the Port of Gdańsk: the Border Sanitary and Epidemiological Control Point in Gdańsk (SANEPID), the Border Veterinary Inspectorate in Gdańsk (Inspection Centres IC1 and IC2), the Voivodeship Inspectorate for the Quality of Agricultural and Food Products in Gdańsk (WIJHARS), the Voivodeship Inspectorate for Plant Protection and Seed Inspection in Gdańsk, and the Gdańsk Branch of the Pomorskie Customs and Tax Office. These entities employ over 200 people to handle cargo and passenger traffic at the Port of Gdańsk². It is difficult to determine the total number of people employed at the Port of Gdańsk with certainty. However, it is estimated that as many as 16,000 people work for entities operating within the Port's administrative boundaries (detailed information can be found in the section on the Port of Gdańsk's impact on the economy).

² The data was provided between 29 July and 28 August 2025 by the following institutions: The Border Sanitary and Epidemiological Control Point in Gdańsk (SANEPID), the Border Veterinary Inspectorate in Gdańsk, the Voivodeship Inspectorate for the Quality of Agricultural and Food Products in Gdańsk (WIJHARS), the Voivodeship Inspectorate for Plant Protection and Seed Inspection in Gdańsk, the Pomorskie Customs and Tax Office and the Maritime Authority in Gdynia (Harbour Master's Office of the Port of Gdańsk).

Gaspol S.A Gdańsk Gas Terminal

operates a facility comprising

16 storage tanks
with a capacity of approx.

13.2 thousand tonnes

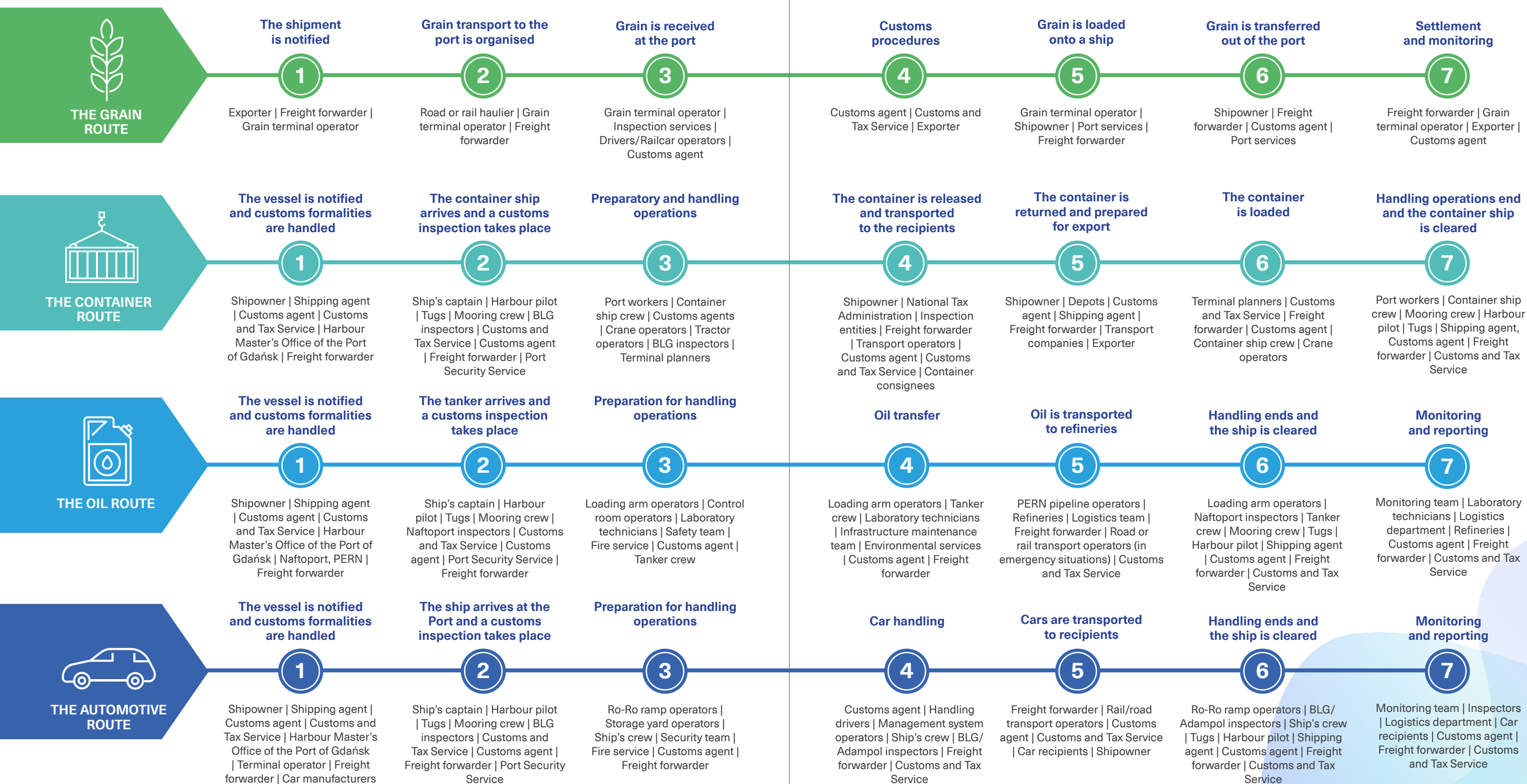
The liquefied petroleum gas (LPG) transfer terminal is located in the outer port, covering an area of approx. 11 hectares

A key stakeholder ensuring the smooth operation of the Port is the Maritime Authority (Urząd Morski), which is responsible for the safety of navigation in all, the roadstead, the fairway leading to the Port, and within the port waters. The operational body of the Maritime Authority in the Port is the Harbour Master's Office, which is responsible for controlling vessel traffic, coordinating the work of pilots assisting with the safe entry and exit of vessels from the Port, companies providing tugboat services to secure mooring operations, and coordinating the work of customs and tax authorities, phytosanitary services, the Border Guard and other units, ensuring not only the safety of vessels but also the safety of food and other products imported into Poland.

A significant group of the operators within the Port area comprises companies providing ship supplies to vessels moored in the Port (ship chandlers), as well as operators responsible for the collection and disposal of waste and bilge water, and for supplying vessels with water, fuel and electricity. While they do not take a direct part in cargo handling, they enable the smooth handling of ships calling at Gdańsk, which generate this cargo throughput. They create further jobs directly linked to the Port of Gdańsk's activities.

As the Port's operations must be adequately secured, security and fire services are also in place on its premises, including Portowa Straż Pożarna Florian Spółka z o.o.

The quays, which constitute the maritime access infrastructure, facilitate the loading and unloading of goods that need to be delivered to their final recipients.



The diversity of cargo handled at the Port of Gdańsk means that each transport route involves different stakeholders and operates under specific conditions. Container transport is the domain of global logistics operators, freight forwarders and multimodal carriers. It is characterised by a high degree of flexibility and requires efficient coordination between terminals, customs authorities and the land transport network.

The interoperability of systems and the availability of infrastructure enabling rapid handling and further distribution of goods are of key importance here. Grain handling relies on seasonality and close cooperation with the agricultural sector. It requires appropriate storage conditions, quality control and access to rail and road infrastructure. The stakeholders include freight forwarders, exporters

and grain terminal operators, who must ensure continuity of supply during peak periods. The oil route involves high technological and safety requirements. Fuel infrastructure operators and technical inspection services play a key role here. The handling of vehicles, whether for import or export, requires precise logistics and the securing of cargo with a high unit value. Key factors here include handling conditions,

the participation of a wide range of stakeholders, the availability of storage facilities, and the punctuality of deliveries, all of which influence the smooth operation of the supply chain in the automotive sector. Each of these routes demonstrates the vast scope of cargo handling operations carried out at the Port and the number of stakeholders involved in these processes.

TFL sector

(transport, freight forwarding and logistics) This sector is crucial to the Port's operations. It comprises businesses classified under Section H of the Polish Classification of Activities: Transport and Warehousing.

Its location near the Tri-City Ring Road, the A1 motorway and exit routes towards Szczecin is particularly attractive to businesses.

Therefore, the TFL sector (transport, freight forwarding and logistics) is crucial to the Port's operations. It comprises businesses classified under Section H of the Polish Classification of Activities Transport and Warehousing. Given the limited availability of land bordering the coastline managed by ZMPG S.A., the Port's dynamic development would not have been possible without the logistics infrastructure being established both within and beyond its administrative boundaries. Given the scale of the Port's development and the road and rail infrastructure that has been expanded over the last 10 years, the Port's immediate area of impact extends beyond its boundaries. The Port's excellent links to major transport routes, in particular the A1 motorway and the S7 (towards Warsaw) and S6 (towards Szczecin) roads, means that some investors from the TFL sector, manufacturers and importers opt to build warehouse facilities outside the Port of Gdańsk Area, but close to these transport routes. TFL sector activity linked to the Port should therefore be analysed and discussed in relation to the metropolitan area, rather than to the Port itself or even Gdańsk. The location in the vicinity of the Tri-City Ring Road, the A1 motorway and the exit routes towards Warsaw and Szczecin is particularly attractive to businesses that also utilise the cargo handling capacity of the Port of Gdynia. This means that both ports are viewed as complementary and attract investment from many entities.

According to data from Statistics Poland (GUS)³ there are over 1,500 businesses based in the

Pomorskie Voivodeship that fall under PKD categories directly related to port activities (in particular: Cargo handling [52.24]; Storage and warehousing of goods [52.10]; Support services for maritime transport [52.22]; Maritime transport agency activities [52.29]; Maritime and coastal passenger transport [50.10]; Maritime and coastal freight transport [50.20]), and the vast majority of these are located in areas surrounding ports and along the transport routes leading to them. Importers also have warehouses there; they pack imported goods and dispatch them to distribution and retail outlets throughout Poland and beyond. A significant proportion of these entities operate and develop within the Port of Gdańsk Area and the facilities located within its boundaries, such as the Pomorskie Logistics Centre, the 'Ku Ujściu' Industrial Park and the Pomorskie Investment Centre (these are described later in this report).

Another area of the Port's impact includes intermodal terminals and manufacturing plants located inland. A significant proportion of the goods handled at the Port of Gdańsk are transported onwards by rail, reaching customers domestically and abroad. There are currently more than a dozen regular rail services operating between the Port of Gdańsk and intermodal terminals across Poland, enabling goods unloaded in Gdańsk to reach their recipients, whilst exporters from inland regions and abroad enjoy convenient access to global markets. These connections facilitate trade for both importers and exporters, creating a seamless distribution chain. The Port's cargo turnover comprises both raw materials and finished products, which reach households via the retail network. Goods handled at the Port include both goods exported abroad and raw materials and supplies ensuring the smooth operation of local businesses. Therefore, the Port's area of impact extends to entities classified as Level 3, as well as to households at the end of the logistics chain, which are not only consumers of some of the goods handled at the Port, but also beneficiaries of the added value generated throughout the logistics chain.

The Port's development involves the deployment of human resources and helps create jobs not only in the port and transport, logistics and storage sectors, but also in construction and renovation firms, among utility providers, and within administrative and inspection control bodies. An analysis of satellite imagery has

identified **approximately 700 businesses operating within the Port of Gdańsk Area**. In addition to entities from the port and port related sectors, the area is home to marine and yacht shipyard s, sports clubs, catering and retail outlets, fuel stations, vehicle repair workshops, wholesalers and many other businesses, which find a market for their products and services

thanks to the development of the entire area and the presence of an increasing number of employees and property owners, as well as a large number of motor vehicles and rolling stock.

Significance of the Port for the functioning and development of industry



The Port of Gdańsk is an attractive location not only for the TFL sector, but also for the development of industrial activity, particularly the shipbuilding industry. There are a number of facilities within the Port of Gdańsk Area where a wide variety of vessels are built and repaired. These include both ships and fishing boats commissioned by foreign shipowners for commercial purposes, as well as warships designed to enhance security in the Baltic Sea. Gdańsk's shipyards are also recognised manufacturers of recreational seagoing yachts and a centre for specialist repairs and inspections, enabling vessels to be certified for navigation.

The Port of Gdańsk is also an important hub for the growing renewable energy sector and the offshore industry in the broadest sense. Among other things, towers for offshore wind turbines are built here. The proximity of maritime infrastructure, access to logistics centres, extensive storage yards and assembly buildings capable of handling the production, assembly and transport of large-scale components, as well as a long-standing shipbuilding tradition, make the Port of Gdańsk a key industrial hub where maritime traditions blend with modern technologies.

Due to its diversified functions, the Port of Gdańsk provides employment for people from a wide range of disciplines from designers and engineers, through mechanical and electrical engineers, welders, fitters and machine operators, to specialists in automation and drive systems. **Entities operating within the Port employ thousands of people and are among the region's key employers, playing a significant role in shaping the local labour market and developing technical and managerial skills, including those needed for the future.**

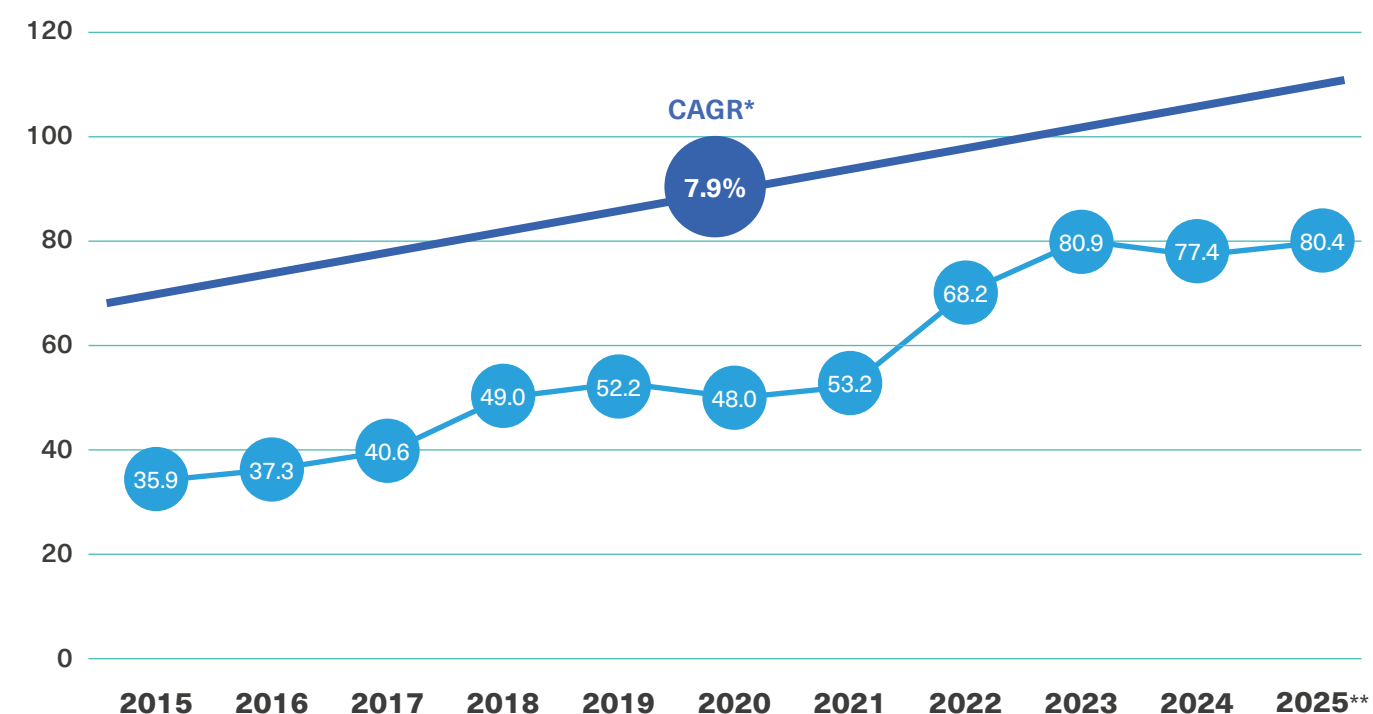
The continued targeted development of the Port of Gdańsk will facilitate the creation of maritime competence centres, which are vital both for the maintenance and development of the Port itself and for sectors linked to its operations, such as the offshore, shipbuilding, automotive, fuel and agri-food processing industries.

³ Database obtained from GUS covering enterprises in the Pomorskie Voivodeship for the relevant PKD sections.

Development of the Port of Gdańsk

Cargo turnover trends and the position of the Port of Gdańsk in Poland and Europe

Chart 1. Cargo throughput at the Port of Gdańsk, 2015–2024 [million tonnes]



*CAGR – *Compound Annual Growth Rate*. This is a measure used to determine the average annual growth of an indicator over a specific period, and it shows what that growth would look like if the value were to increase at the same rate every year.

** Forecast

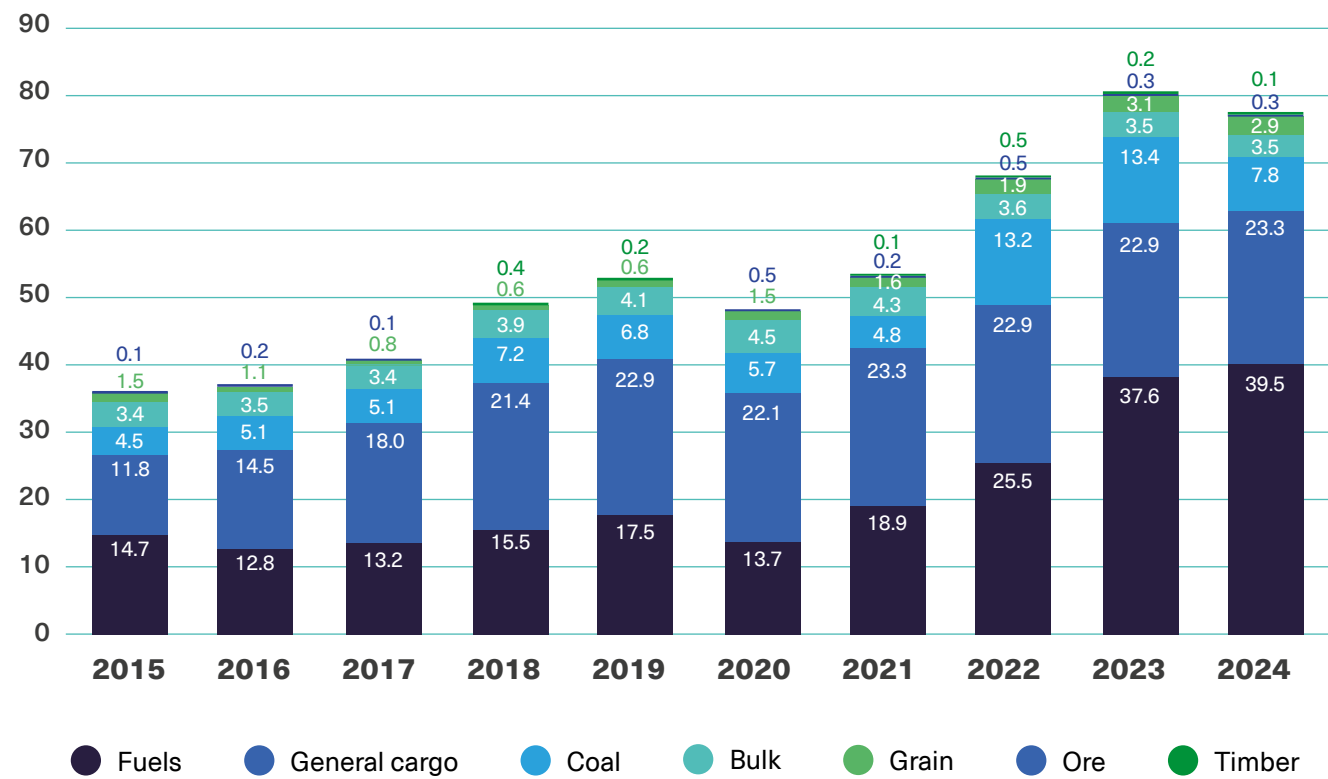
Source: compiled based on ZMPG S.A.'s data

Between 2015 and 2024, the Port of Gdańsk recorded strong growth in cargo throughput the cumulative annual growth rate over this period stood at 7.9% (CAGR for 2015–2024). The highest increase compared to 2015 was achieved in 2023 at 151.8%, meaning that cargo handling volumes were more than 2.5 times higher than in the base year. Growth was particularly strong after 2021, which is, on the one hand, the result of gradually increased capacity and infrastructure development, and on the other, the rapidly growing importance of Gdańsk in the supply chains of the Baltic Sea region, particularly in the fuel sector. In 2023, the Port of Gdańsk handled a record 80.9 million tonnes of cargo, making it the largest Polish port on the Baltic Sea and the fifth largest port in the European Union. A year later, in 2024, cargo throughput at the Port of Gdańsk

stood at 77.4 million tonnes, down by around 4.4% compared with the previous year. This was mainly due to a reduction in coal cargo volumes (a decrease of around 5.5 million tonnes, or over 43%, was recorded in this category), which had reached very high levels in 2022 and 2023 following the energy crisis triggered by Russia's invasion of Ukraine. In order to ensure energy security and fill the coal gap following the decision to ban imports of this raw material from Russia, the Port of Gdańsk had to adapt its cargo handling infrastructure and bring new quays into operation, enabling additional coal unloading.

In 2024, the Port of Gdańsk handled over 4,200 vessels (commercial and non-commercial), representing a decrease of 103 calls compared to the previous year. In the case of commercial vessels, the

Chart 2. Breakdown of cargo throughput at the Port of Gdańsk, 2015–2024 [million tonnes]



Source: compiled based on ZMPG S.A.'s data

Port of Gdańsk handled 3,559 such vessels last year (by way of comparison: in 2023, this figure stood at 3,602 ships). However, at the same time, a much higher average gross tonnage of ships was observed (25,025 GT compared to 24,630 GT in the previous year). This indicates a greater number of large tanker-type vessels, which is a result of the increase in crude oil handling at the Port and the greater number of container ships calling at Gdańsk. In 2024, an average of 10 merchant ships were handled each day.

Liquid fuels dominate the cargo handling structure at the Port of Gdańsk, accounting for over 51% of cargo handled in 2024 (by comparison, this figure stood at 41% in 2015). This is the cargo category in which a record volume was recorded last year, namely 39.5 million tonnes. At the same time, over the last 10 years, the volume of cargo handled in this group has increased by nearly 170%. Thanks to Naftoport's transfer infrastructure, the Port of Gdańsk is able not only to meet the full crude oil requirements of the domestic refineries in Gdańsk and Płock, as well as strategic reserves, but also to supply two German refineries. Together with **coal**, the third largest cargo group by volume, energy carriers accounted for 61% of all cargo handled at the Port in 2024.

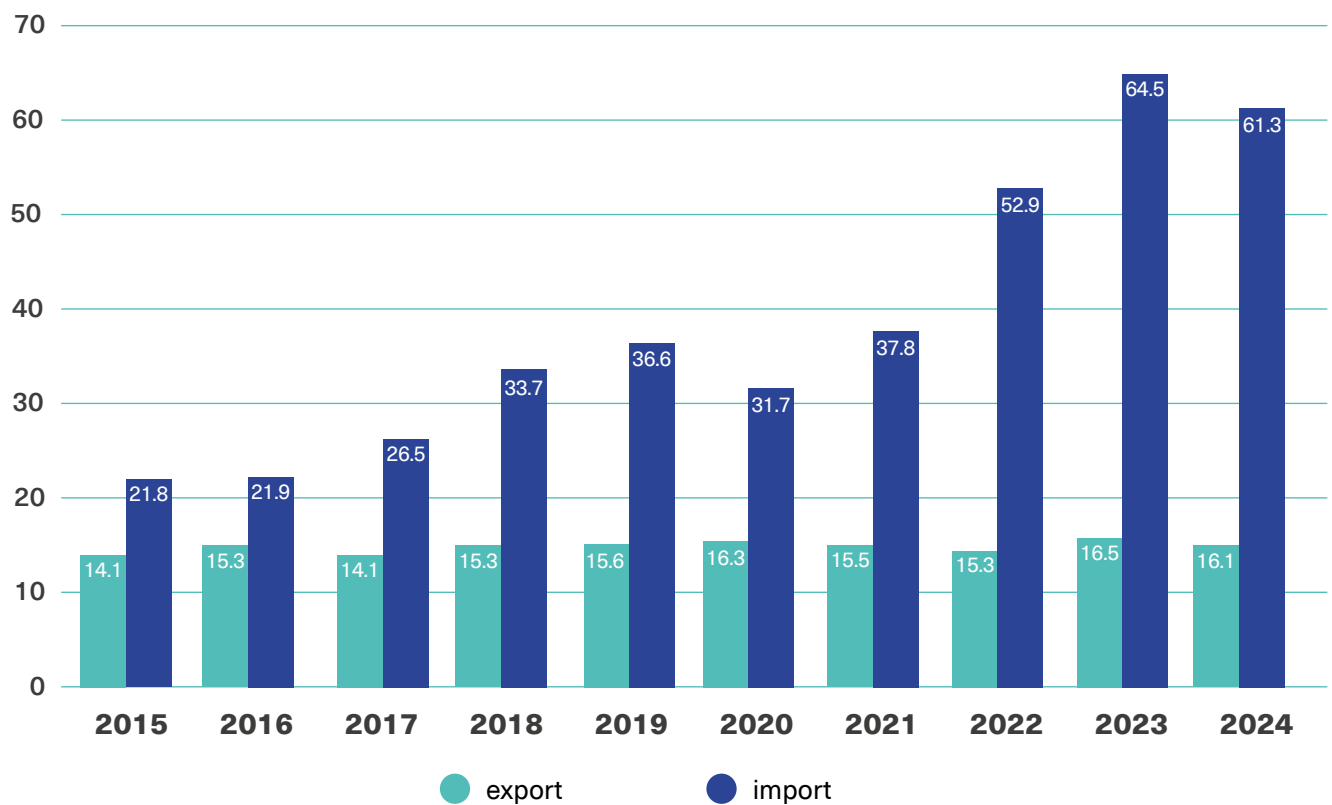
The second largest group in terms of handling volume is **general cargo**, mainly **containers**. In 2024, the volume of cargo in this group reached a record 23.3 million tonnes, accounting for 30.2% of all cargo handled. Over the last 10 years, the volume of general cargo handled has almost doubled. The volume of containers, which accounted for 88% of all general cargo in 2024, amounted to 2.25 million TEU, representing an increase of 9.7% compared to the previous year, and 106% compared to 2015, and was the highest figure recorded to date at the Port. This result marks the fourth consecutive year that the Port of Gdańsk has been ranked as the largest container port in the Baltic Sea (the Port has held the leading position in the Baltic since 2021). Consolidating this position and further growth in container throughput will also be made possible by the operation of the new T3 container terminal at Baltic Hub, which is due to open in June 2025.

Container throughput at the Port of Gdańsk, 2015–2024 [TEU]



Source: compiled based on ZMPG S.A.'s data

Chart 3. Cargo throughput at the Port of Gdańsk, broken down by exports and imports, 2015–2024 [million tonnes]



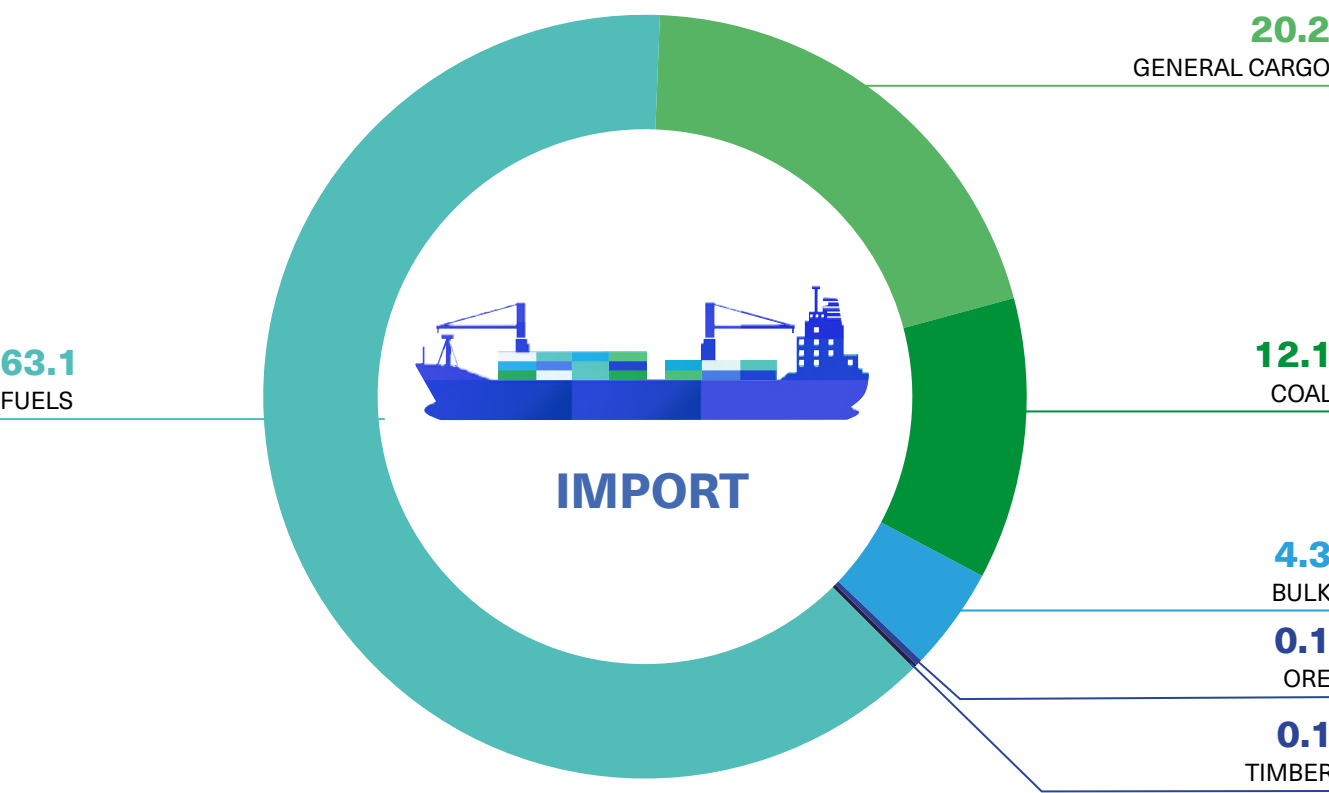
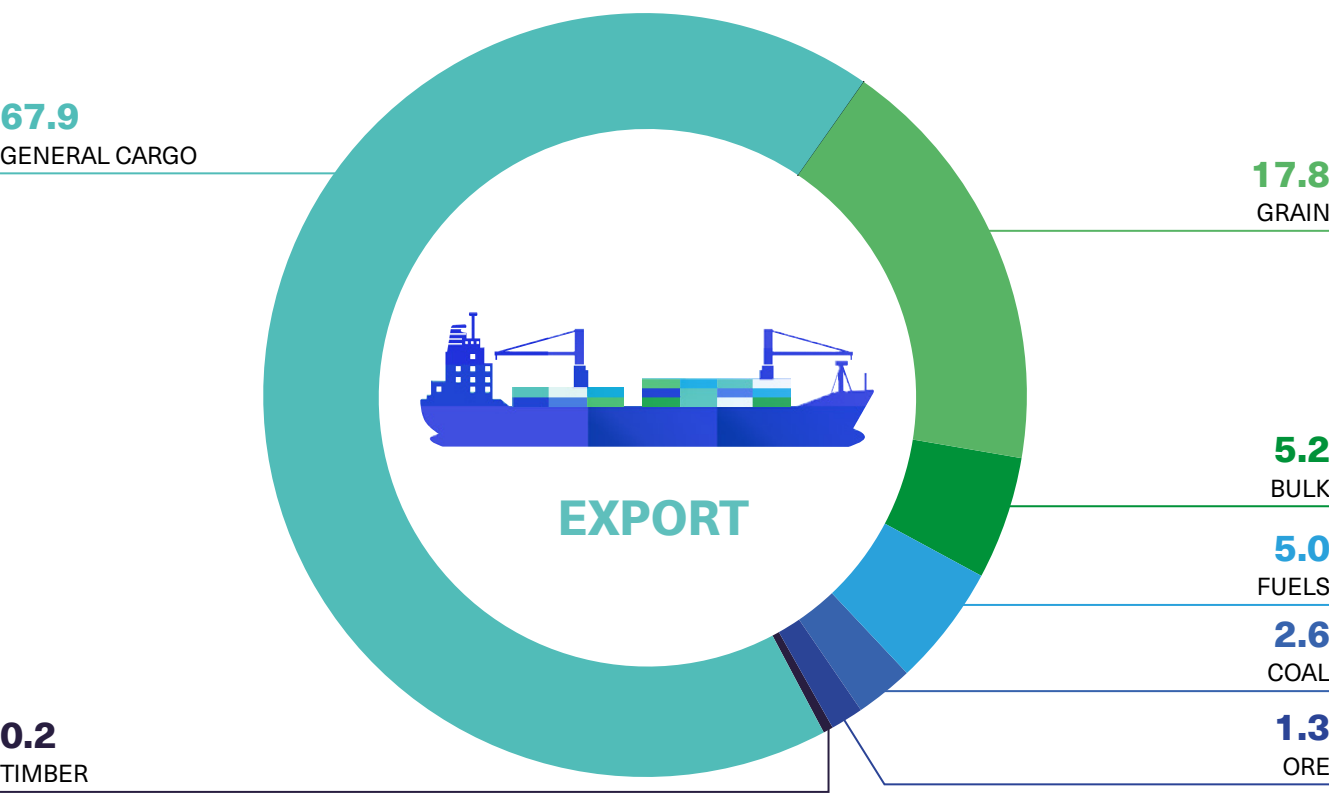
Source: compiled based on ZMPG S.A.'s data

An analysis of the cargo flows handled by the Port of Gdańsk over the last 10 years shows that **exports remained relatively stable during this period**, fluctuating between 14.0 and 16.5 million tonnes, although a gradual upward trend is evident from 14.1 million tonnes in 2015 to 16.1 million tonnes in 2024. Imports, on the other hand, show a significant upward trend. Over the course of ten years, their volume has almost tripled, rising from 21.8 million tonnes in 2015 to a peak of 64.5 million tonnes in 2023, before falling slightly to 61.3 million tonnes in 2024. Growth was particularly dynamic between 2020 and 2023, which may be linked to the rebuilding of supply chains following the COVID-19 pandemic, geopolitical changes and growing import needs for energy carriers following the outbreak of the war in Ukraine.

General cargo (67.9%), **mainly containers**, accounted for the largest share of the Port of Gdańsk's exports in 2024, reflecting a relative specialisation in the export of higher value added products.

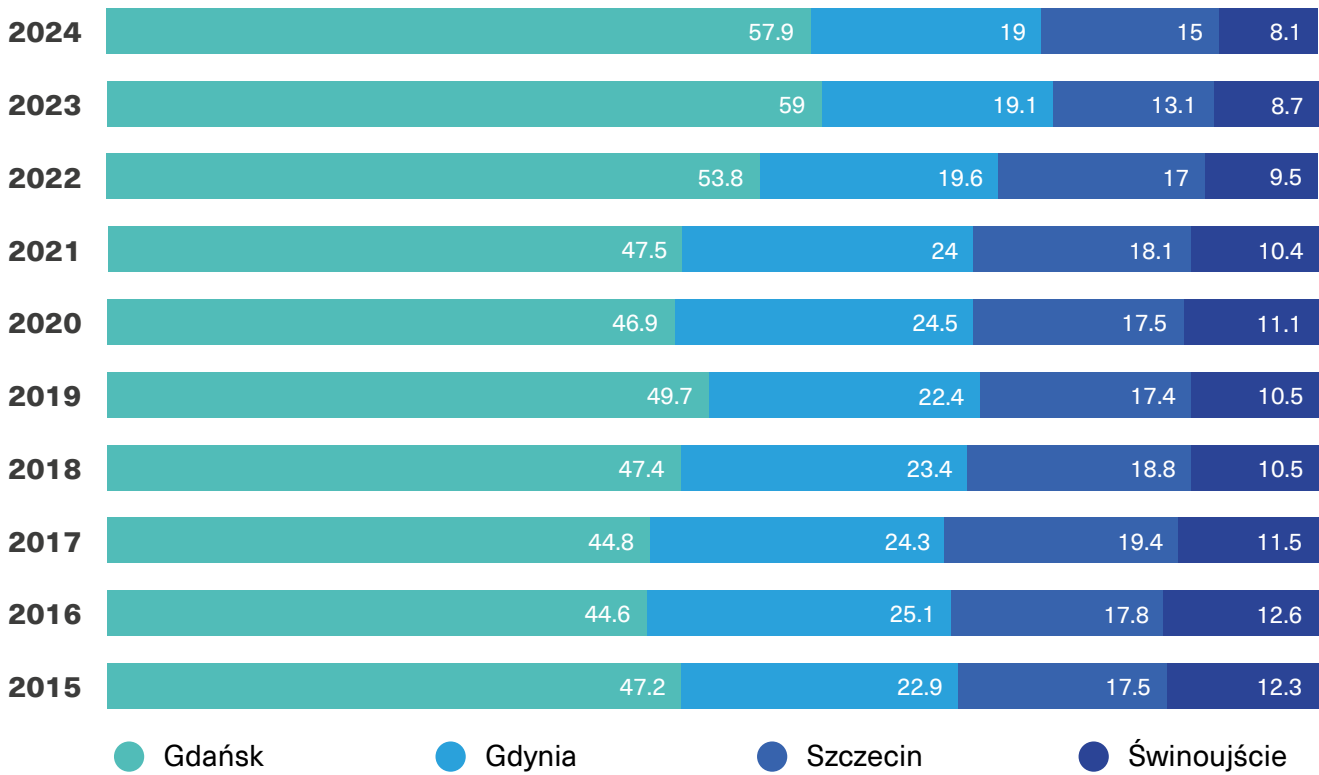
Poland's exports are dominated by processed goods, such as electronics, car parts and furniture, as well as clothing, all of which fall under the category of general cargo. Imports, on the other hand, are dominated by fuels (63.1%), which highlights the significant importance of energy carriers, such as crude oil and gas, and underlines the strategic importance of the Port of Gdańsk for Poland's energy security. The balance indicates a more advanced export structure (a large share of general cargo), with a more raw-material-based nature of the imports (fuels, coal). It also shows the versatility of the port infrastructure, which is adapted on the one hand to handling strategic raw materials and on the other to modern container trade, thus boosting the Port's competitiveness in the Baltic Sea region.

Chart 4. Structure of exports and imports by category of cargo handled in 2024 [%]



Source: compiled based on ZMPG S.A.'s data

Chart 5. Market share of the largest Polish seaports by cargo throughput, 2015–2024 [%]



Source: compiled based on the Statistical Yearbook of the Maritime Economy, 2024, GUS.

The rapid growth of the Port of Gdańsk over the past decade has led to a shift in the market share distribution in terms of cargo throughput across Poland's four main seaports: Gdańsk, Gdynia, Szczecin and Świnoujście. Over the past 10 years, the Port of Gdańsk has gained over 10 percentage points in market share, and **today accounts for almost 58% of cargo throughput at Poland's largest seaports**. This means that the Port of Gdańsk is currently of key importance to Poland's maritime transport, while also serving as a universal logistics hub capable of handling various types of cargo. The growing importance of the Port of Gdańsk is attributable partly to the intensive development of its infrastructure in recent years, including the expansion of deep-water container terminals (the Port of Gdańsk is the only deep-water port in Poland capable of accommodating the world's largest container ships), and the port's successful integration into global supply chains.

As a result, in recent years the Port of Gdańsk has strengthened its position not only in Poland but also in Europe. The high growth rate in cargo throughput in recent years **has placed Gdańsk among the leading European ports**, bringing it close to the throughput levels of ports such as Amsterdam and Hamburg. At the end of Q4 2024⁴, the Port of Gdańsk **ranked 7th among the largest ports in the European Union in terms of cargo throughput volume**. The Port of Gdańsk's growth trends are continuing, thanks in part to the gradual expansion and increase in handling capacity, particularly in the area of the outer port, and effective integration with European transport corridors within the TEN-T core network: ETC⁵ Baltic Sea – Adriatic Sea Corridor and ETC Baltic Sea – Black Sea – Aegean Sea. The Port of Gdańsk has now become one of the main points of access to European Union markets from the Baltic Sea, serving as the maritime gateway to Central and Eastern Europe and a strategic hub for the supply of energy carriers to Poland.

⁴ Eurostat data, Maritime transport - main quarterly results, Top 5 ports - gross weight of goods handled in each port (mar_qg_qm_pwh), https://eo.europa.eu/eurostat/databrowser/view/mar_qg_qm_pwh/default/table?lang=en&category=mar.mar_q (accessed: 26 September 2025).

⁵ ETC (European Transport Corridor).

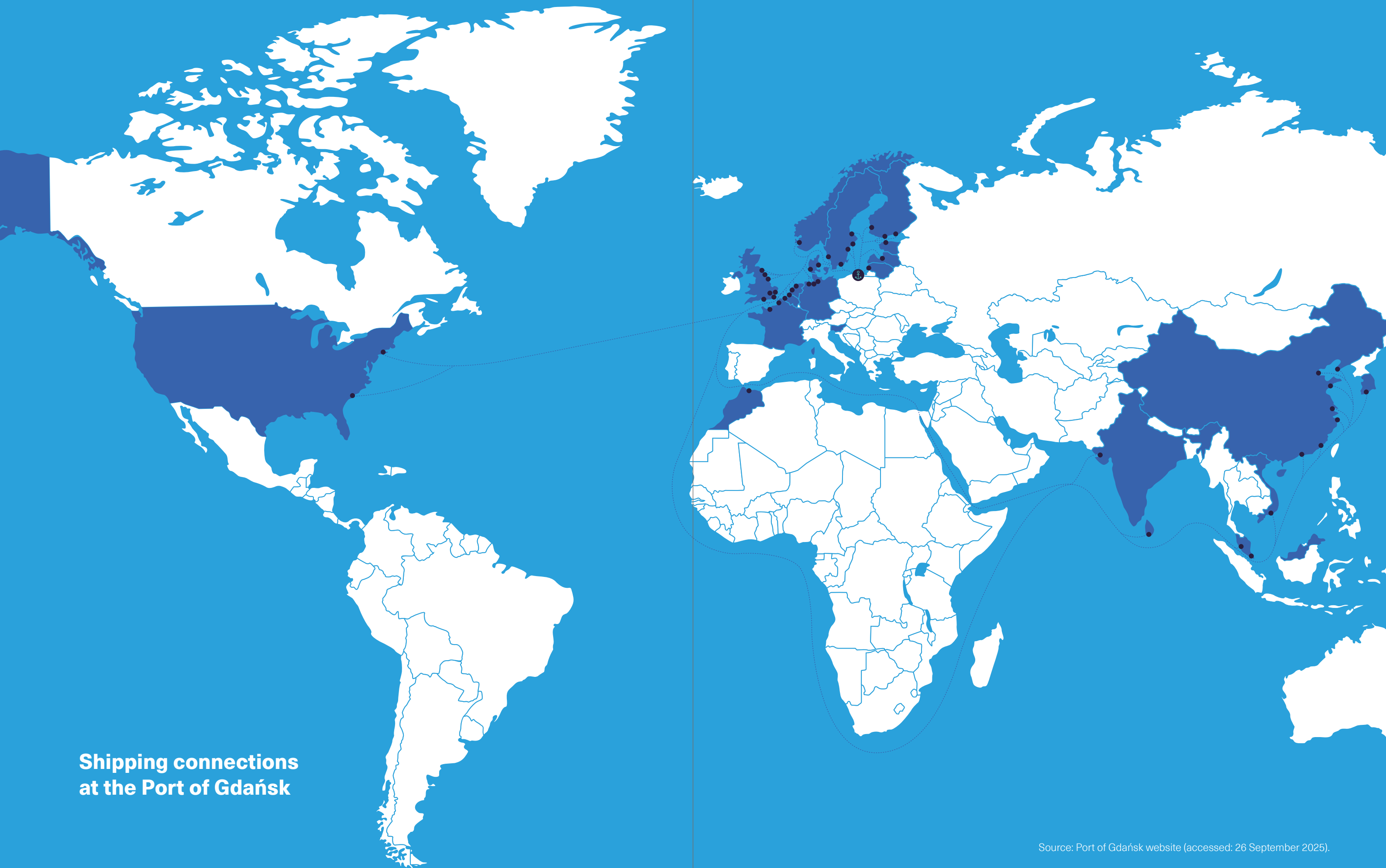
Gross weight of goods handled at the largest EU ports in 2024 [million tonnes]



Source: compiled based on Eurostat's data.

*For Gdańsk, the figures are based on data provided by ZMPG S.A.

Shipping connections at the Port of Gdańsk



Source: Port of Gdańsk website (accessed: 26 September 2025).

As Poland's largest seaport and one of Europe's fastest-growing ports, the Port of Gdańsk has become a key link in supply chains across Central and Eastern Europe and a gateway to a range of markets. Today, the Port operates regular shipping services, connecting Poland with other Baltic ports, the North Sea, North America, Africa and Asia – in total with 21 countries worldwide and over 40 ports. This global connectivity positions the Port of Gdańsk as a key player in international commerce. For Poland, the growing importance of the Port of Gdańsk

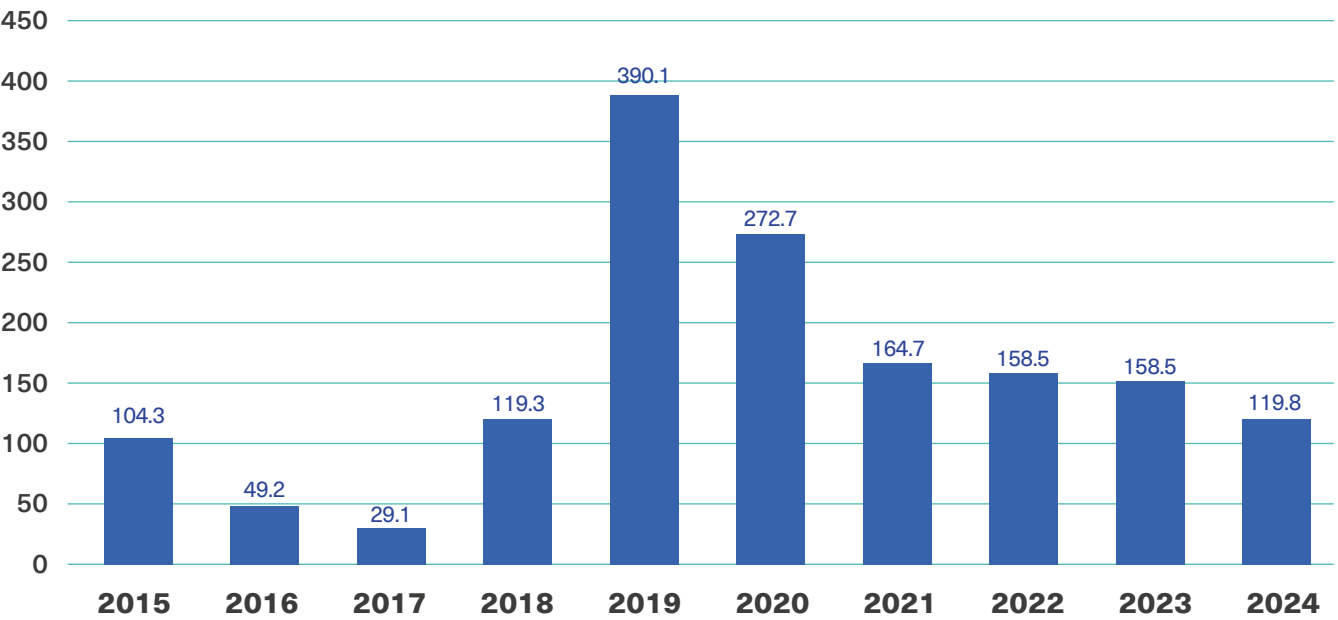
is crucial to further strengthening the country's position as a major logistics hub in the region and to boosting the competitiveness of Polish exports and imports through efficient access to global supply chains. A key focus of the Port's development plans is the continued expansion of its network of connections, in particular the development of regular ocean-going services to ports in South East Asia, North America and South America. Such expansion will enable an increase in cargo handling volumes and the diversification of trade routes⁶.

Capital expenditure at the Port of Gdańsk

The Port's dynamic growth over the last decade would not have been possible without major investments. Between 2015 and 2024, ZMPG S.A.'s capital expenditure alone amounted to over PLN 1.5 billion. However, the investments at the Port of Gdańsk comprise not only the funds committed to its development by ZMPG S.A., the value of which is shown in the chart below, but also expenditure by other entities using the port infrastructure, such

as quays and storage areas, as well as the Maritime Office, which is responsible for maritime access infrastructure and the safety of navigation. Between 2015 and 2024, capital expenditure on the operation of the Port of Gdańsk, including such infrastructure as breakwaters, fairways and navigational aids, incurred by the Maritime Authority, totalled nearly PLN 1 billion.

Chart 6. Capital expenditure of ZMPG S.A., 2015–2024 [PLN million]



Source: compiled based on ZMPG S.A.'s data

⁶ Management report of Zarząd Morskiego Portu Gdańsk S.A. for 2024.

Key investments recently carried out within the Port of Gdańsk include the extension and modernisation of the quays (Bytomskie, Rudowe III, Wiślane and Węglowe with a total value of approx. 0.51 billion), the construction of a new 'W' fuel station in the Outer Port (with a value of approx. PLN 0.5 billion), the development of the Baltic Hub Container Terminal (commissioning of the T3 quay value approx. PLN 2 billion and construction of T5 with a value of approx. PLN 1.2 billion), investment in an FSRU terminal, which will be used for the regasification and transfer of liquefied natural gas

(LNG) (investment value approx. PLN 4.5 billion) as well as the modernisation of road and rail infrastructure and safety systems. These investments aim to increase the Port's cargo handling capacity, improve access from both land and sea, and align with EU environmental requirements (e.g. implementing an onshore power supply (OPS) system). Through these measures, the Port of Gdańsk maintains its competitiveness in the European market and positions itself for further growth in cargo handling and new challenges related to the energy transition and digitisation.

KEY DEVELOPMENT PROJECTS UNDERWAY AT THE PORT OF GDAŃSK

Construction of berth 'W'

The construction of the new handling berth 'W' at Naftoport (Liquid Fuel Handling Facility) will bring the total number of handling berths to 6, enabling the handling of additional vessels with a deadweight tonnage of up to 300,000 DWT, and will increase the terminal's throughput by 9 million tonnes, to 49 million tonnes per annum. The construction of this berth, together with the construction of new quays and the development of Quay I, is a joint project between Naftoport and the Port of Gdańsk Authority. The investment is worth approx. PLN 0.5 billion. The berth is scheduled for completion by 2027.

Floating LNG terminal

The FSRU-type floating LNG terminal (*Floating Storage Regasification Unit*) is a key investment for Poland's energy security, involving the construction of infrastructure capable of receiving, temporarily storing and regasifying over 6 billion m³ of gas per year. The development of this part of the Port is accompanied by the construction of a breakwater, carried out by the Maritime Authority in Gdynia. The investment is estimated to be worth PLN 4.5 billion. The terminal is scheduled for completion by 2028.

Breakwater

The breakwater will primarily protect the FSRU from waves, which is a strategic investment to ensure the security and diversification of natural gas supplies. The breakwater and the FSRU are being funded by the Maritime Authority in Gdynia and by Gaz System, respectively. Once completed, the breakwater will be nearly 1,300 metres long. A new approach fairway and the necessary navigational aids will also be constructed to ensure the safe mooring, unloading and manoeuvring of gas carriers. The investment is worth nearly PLN 800 million, and is scheduled for completion by the end of 2027.

T5 Container terminal

The T5 container terminal – a development covering an area of approximately 21 hectares will initially serve as a base for the installation of offshore wind turbines for offshore wind farms in the Baltic Sea. The construction will include two handling quays and a Ro-Ro berth with dolphins. The investment costs nearly PLN 1.2 billion, and is expected to be completed by the end of 2026.

Implementation of the OPS system

Construction of OPS installations – in accordance with European Union regulations, specifically AFIR (Regulation (EU) 2023/1804), EU Member States must ensure a minimum level of onshore power supply (OPS) at seaports belonging to the TEN-T network. ZMPG SA is currently implementing a project to construct an OPS system at the Port of Gdańsk, which will supply passenger vessels and container ships with electricity whilst they are berthed at the port quays. By 2030, 9 power supply points are planned for the BHCT and 4–5 points at the Obrońców Westerplatte Quay. The project also includes expanding the power grid within the port and constructing a new primary substation, which will enable the port to meet an electricity demand twice that of the current level. The investment is planned to be completed by 2030.

The total value of the investments described above, which are being carried out within the Port of Gdańsk, is PLN 7 billion.

A key aspect of the development of the Port of Gdańsk is to encourage local government investment in the development of onshore access infrastructure and the provision of utilities to sites within the Port of Gdańsk Area. The total amount of funds invested in this area over the last 10 years by the City of Gdańsk and its subordinate bodies is estimated at over PLN 241 million. The works financed with these funds included the construction of road networks, environmental assessments and documentation for the modernisation of road-rail junctions necessary for the implementation of the investment, as well as the resolution of conflicts with existing installations, including the PERN pipeline⁷.

These investments are a consequence of the Port's development, as diversifying its activities and increasing cargo turnover requires not only the construction of a storage and logistics base, but also the integration and expansion of the road, rail and pipeline infrastructure. Another key element is the development of transport corridors into the inland areas to ensure the efficient flow of cargo and the Port's full accessibility within the national and international logistics network.

Modernisation of Sucharski Route

The Sucharski Route (Trasa Sucharskiego), as part of National Road No. 89, provides a vital road link between the Port of Gdańsk (and in particular the Northern Port) and the network of other national roads, including the S7 expressway and the A1 motorway. It allows access to the Port without passing through the centre of Gdańsk. The project's main objective is to improve access to investment sites in the Northern Port area by easing traffic congestion, in view of the intensive development of the logistics and industrial infrastructure. The contractor for the works is Polimex Mostostal. The cost of constructing the flyover and road system at Sucharskiego is PLN 70 million.

⁷ Data from the City of Gdańsk's Development Directorate, provided by the Economic Policy Department of Gdańsk City Council.



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Over the past 10 years, the Port of Gdańsk has gained over 10 percentage points in market share, and today accounts for almost 58% of cargo throughput at Poland's largest seaports.

The leading investor in the Port of Gdańsk Area is the Municipality of Gdańsk, operating here through its company – the Gdańsk Economic Development Agency (InvestGDA), which for many years has been preparing and developing investment sites around the Port and seeking investors interested in the construction and operation of logistics infrastructure in this area, as well as attracting manufacturers of goods that require access to a transport hub, such as the Port, due to how supply chains are structured. Between 2015 and 2024, InvestGDA completed several large-scale projects within the administrative boundaries of the Port of Gdańsk, which were significant for the Port's development.

Pomorskie Logistics Centre (PCL)

The Pomorskie Logistics Centre (PCL) is a modern complex covering an area of **109 hectares**, situated next to the Baltic Hub container terminal. The PCL currently comprises six warehouse, production and office buildings with a floor area of **189,000 m²**, built on a **43-hectare site**. The space is currently used by companies including Eurocash, Americold, DHL, BTL, Leroy Merlin, Langowski Logistics and DSV Solutions.

Pomorskie Investment Centre (PCI)

The Pomorskie Investment Centre (PCI) is an industrial park covering a total area of **67 hectares**, situated in the vicinity of the Port and the PCL, intended for businesses operating in the maritime, offshore and TFL (transport, freight forwarding and logistics) sectors. Currently, six companies have established operations on the site, with CTP leasing space in the **118,000 m²** of production buildings it has built for such entities as Morska Agencja Gdynia, Trichan and MEP. InvestGDA alone has built two storage yards covering 1.7 hectares, an internal road network and storage reservoirs at the PCI.

'Ku Ujściu' Industrial Park

The 'Ku Ujściu' Park is a development site covering a total area of **62 hectares**, intended for investors in the industrial and the TFL sectors. The Balticon and Radunia Containers container depots have been established here, significantly increasing the Port's storage capacity, alongside facilities for other local businesses (including: HydroMarpp, PHU Metal System, Handel i Minerale Nowak). An Intermodal Terminal may be built in the future next to the railway siding located at the border of the site.

KOGA Office Centre

The KOGA Office Centre is an **8,100 m² building** located in the immediate vicinity of the aforementioned Baltic Hub. It serves as an administrative and service hub for the logistics and industrial parks. Tenants at the KOGA Office Centre include border control services (the Tax Administration Chamber in Gdańsk Customs Branch, WIJHARS), customs agencies (Żytkowiak, TFL Silesia) and port-related businesses (Americold, Fabe, Off Dock, FBSerwis). Around 200 people work across the 18 companies leasing space at the Office Centre. It also houses a nursery with a crèche.

Of the 238 hectares of land prepared for investors by InvestGDA (PCL: 109 ha, PCI: 67 ha, 'Ku Ujściu' Industrial Park: 62 ha), **144 hectares** (60%) were developed by the end of June 2025, comprising: 43 hectares of PCL land (39%), 67 ha of PCI land (100%), and 34 ha of land of the 'Ku Ujściu' Industrial Park (54%). **The total investment made by the Gdańsk Economic Development Agency and its investors over the last 10 years amounts to PLN 1.42 billion.** It is estimated that, with these investments, a total of approx. 1,800 people have found employment in the manufacturing, service and distribution sectors in this area. A significant aspect of InvestGDA's investment activities within the administrative boundaries of the Port of Gdańsk Area is the construction of access infrastructure, including, in particular, internal access roads with increased load-bearing capacity linking the Port to the PCL and PCI logistics and warehousing facilities, as well as storage reservoirs. To date, InvestGDA has co-financed the construction within the Port Area of Prof. W. Andruszkiewicz Street, Capt. Józef Dambek Street and Antoni Grabarczyk Street, with a total length of approximately 3 km.



Economic impact of the Port of Gdańsk

The Port of Gdańsk is one of the most important logistics and trade hubs in the Baltic Sea region. The Port's significance extends far beyond its transport functions; it is a powerful driving force for growth in both the national and regional economies.

It contributes to the gross domestic product by generating added value, as well as to job creation in various sectors of the economy linked to port operations. These have a significant impact on tax revenues, both for the state budget and for regional institutions, thereby supporting the financial stability and development of local communities. Furthermore, the Port affects household incomes by increasing purchasing power and stimulating consumption, which in turn drives further economic growth across many service and retail sectors.

This section aims to analyse the Port of Gdańsk's economic impact by examining its influence on:

- The labour market and employment
- Value added and GDP
- Public finances
- Foreign trade.

Each of these areas is discussed in a separate section. Within each section, the results of an in-depth analysis of the impact of the Port of Gdańsk's activities, based on the Leontief model, are presented, taking into account the broader multiplicative effects (see pages 57-58 for a detailed summary of the results). This makes it possible to demonstrate the full impact of the Port of Gdańsk on the economy at both national and regional levels covering value added, employment and tax revenue.



The Leontief model was used to estimate the impact of the Port of Gdańsk's operations on the economy.

It enables the calculation of the economic impact on GDP (value added) and employment, as well as the tax revenue generated by a given enterprise. The approach involved identifying and selecting over 100 companies linked to the Port's operations and using their financial data as input for the model. The analysis also took into account the Port of Gdańsk's contribution to the economy of the Pomorskie Voivodeship, the Tri-City and Gdańsk. This made it possible to quantify the Port's contribution to the national, regional and local economies. Furthermore, the analysis also identified the effects generated by businesses in the TFL sector and by ZMPG S.A. to highlight their significance in the context of the economic impact of the Port of Gdańsk's operations.

The expenditure and revenue of entities operating in the Port were treated as a demand stimulus that boosts economic activity in Poland, taking into account three separate effects (avenues of impact):

DIRECT IMPACT
reflecting the impact of primary expenditure on the economic activity of the region and the country

INDIRECT IMPACT
reflecting the impact of increased economic activity
across all sub-suppliers

● INDUCED IMPACT

reflecting the additional demand in the economy generated by household expenditure due to wages received, in the proportion corresponding to the increased activity of enterprises as part of the direct and indirect impact.



Impact on the labour market

Direct employment at Port of Gdańsk Authority S.A. alone stood at 374 people in 2024. This is what is known as Level 0 – personnel primarily responsible for managing infrastructure, coordinating port operations, overseeing investments and handling administrative matters. Taking into account the entire ZMPG S.A. Capital Group, this figure rises to 759 employees.

The scale of employment increases significantly when one considers those working within the Port at businesses and institutions involved in operational activities, i.e. Level 1. It is difficult to determine this figure precisely, as many businesses also operate outside the port area in parallel. However, it should be kept in mind that port operations also include the employees of external companies involved in logistics, transport and maintenance, as well as customs, security and administration staff, and other business partners.

The Port of Gdańsk is a vast area where over 16,000 people are employed. However, due to the nature of its operations, this figure varies from month to month. Some of these people work in areas subject to access control coordinated by ZMPG S.A., which means that as of 1 June 2025, approximately 8,500 access passes issued by ZMPG S.A. were active.⁸ In addition, there are over 1,400 Baltic Hub employees who are covered by a separate pass system, bringing the total to approximately 10,000 people.

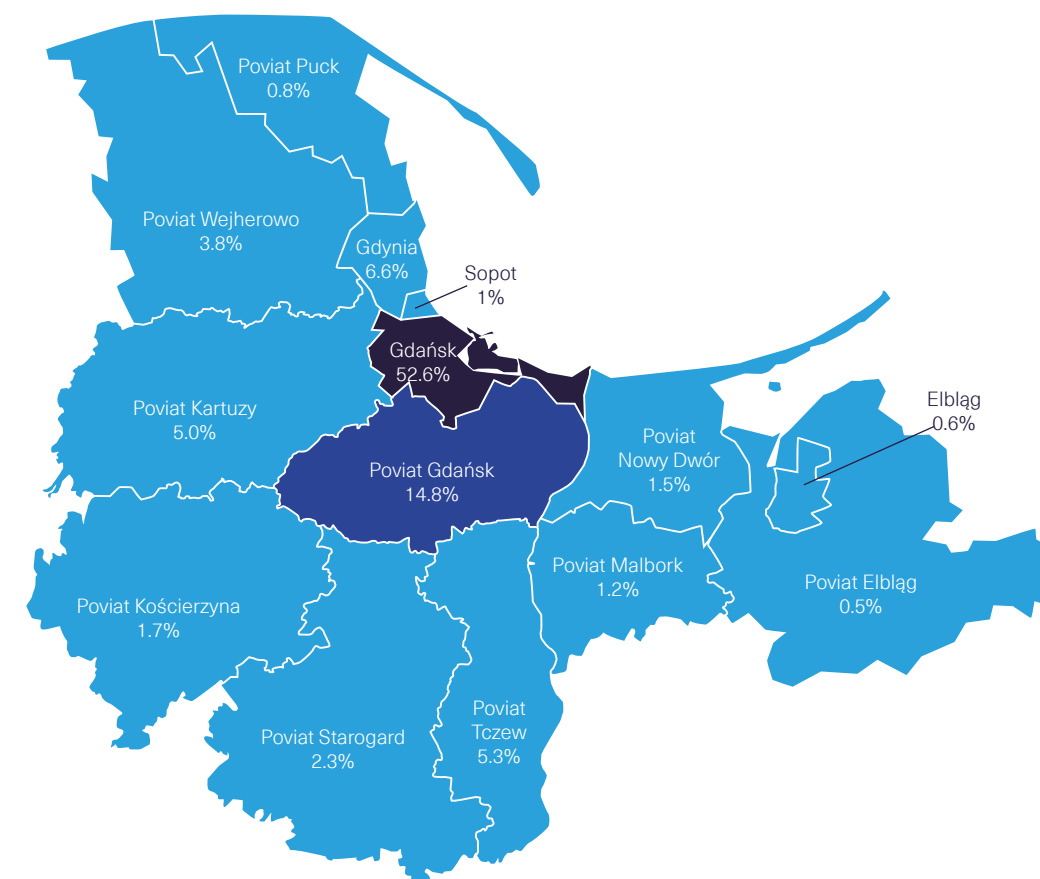
Since some port areas are not covered by the pass system, an additional analysis was performed based on data from mobile phone connections to BTS (Base Transceiver Station). The analysis showed that in the first half of 2025, an average of 15,600 people worked within the Port area, with a peak of 16,200 people recorded in March 2025⁹. Data from SIM cards also made it possible to determine the residential

⁸ This figure includes employees of organisations operating within the area managed by ZMPG S.A., which is used by, amongst others, Naftoport, PERN, Gaspol, Port Północny and Węglukoks, which, although they have their own access systems, require their staff to also hold passes issued by ZMPG S.A. due to the specific nature of the Port's operations.

⁹ The estimates were based on the number of connections made by unique SIM cards within a calendar month and during the period January–June 2025, used in mobile phones and smartphones on the T-Mobile network. The telecommunications

45

Employment structure in the Port of Gdańsk Area by place of residence
(Q1 2025 average)



Source: findings from an analysis of the number of unique SIM card connections within the Port Area.

distribution of employees: over half (an average of 52.6%) live in Gdańsk, 14.8% in the Gdańsk Poviát, and 6.6% in Gdynia. As illustrated by the data on the map above, businesses operating in the Port provide jobs for people from several poviats within the metropolitan area, as well as from the neighbouring Warmian-Masurian Voivodeship.

These findings confirm the Port of Gdańsk's role as a major centre for employment and skills development at local and regional level, and that its activities stimulate demand for other services, including public transport.

Employment generated by the Port's operations and in the surrounding area

The overall impact of the Port's operations on the labour market which is significantly broader than the employment generated within ZMPG S.A.

itself and in the port's immediate vicinity has been estimated using the Leontief model. The analysis takes into account four levels: starting with ZMPG S.A. (Level 0), through port operators within the Port (Level 1), the transport, freight forwarding and logistics sector (Level 2), up to the entire national economy (Level 3).

At Level 0, which includes ZMPG S.A. alone, the company's operations accounted for 2,800 jobs across the country in 2024, of which direct, indirect and induced jobs accounted for 1,700, 400 and 700, respectively. At Level 1, i.e. quay operators and port businesses, it can be estimated that the Port generated 5,900 jobs in 2024, of which direct, indirect and induced jobs accounted for 3,500, 800 and 1,600, respectively. This group of entities generates the basic economic linkages associated with the day-to-day handling of cargo. The greatest impact was observed at Level 2, which includes the transport, freight forwarding and logistics sectors.

operator's extrapolation algorithms were used, which enable the estimation of the total number of people based on connections from a subset of users of a single operator who have given active consent for SIM card geolocation.

Chart 7. Employment at ZMPG S.A., 2015–2024



Source: compiled based on ZMPG S.A.'s reports.

accounting for approximately 73% of the total employment effect. In connection with the activity of the TFL sector, the Port's operations generated 60,800 jobs in 2024, of which direct, indirect and induced impact accounted for 35,800, 8,600 and 16,400 jobs, respectively. **Across Poland (Level 3), the Port's operations accounted for 83,700 jobs**, of which 49,800 were direct, 11,300 were indirect, and 22,600 were induced jobs. This means that around 60% of total employment linked to Port's activities resulted from direct effects, whilst 40% came from indirect and induced effects.

At the regional level, it is estimated that Port's activities generated 15,200 jobs in Gdańsk, 25,500 in the Tri-City and 47,700 across the entire Pomorskie Voivodeship in 2024. The share of employment linked to the Port's activities in the total number of insured persons employed by social insurance payers in the Pomorskie Voivodeship stood at 5.7% (a total of 892,700 people are employed). This means that one in every twenty jobs in the voivodeship is linked to the Port's activities.



Jobs created and sustained as a result of the Port of Gdańsk's operations, broken down by specific areas of impact.

83,714

Poland

47,738

Pomorskie Voivodeship

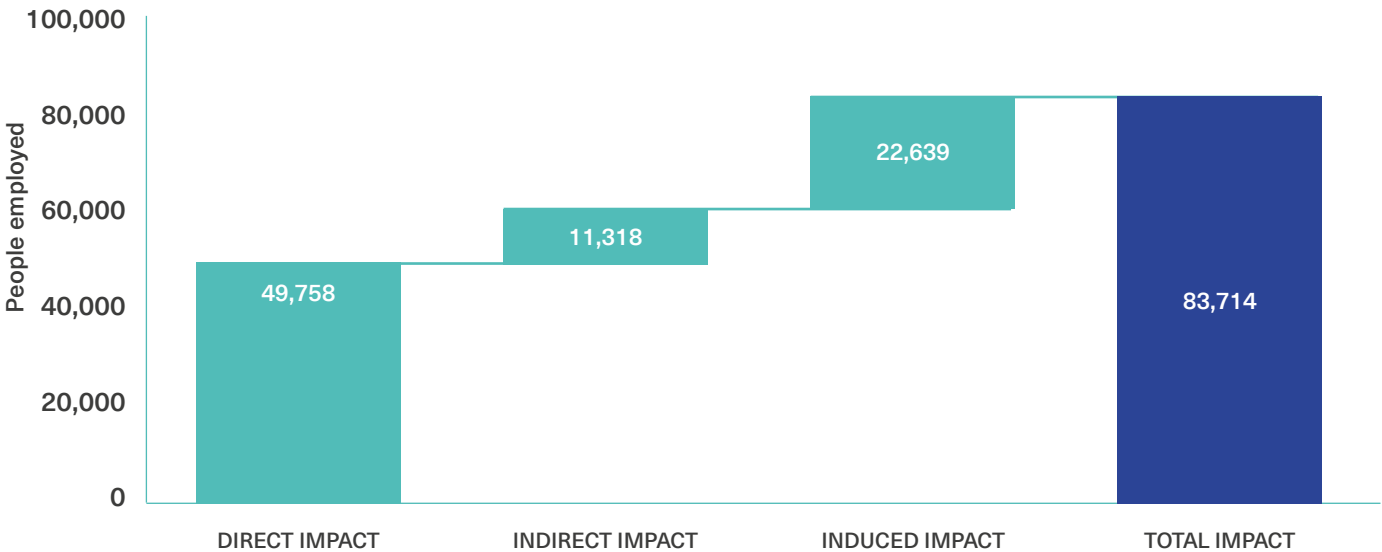
25,494

Tri-City

15,241

Gdańsk

Chart 8. Employment generated by the Port of Gdańsk's operations in 2024



Source: own compilation.

Taking into account the families of those employed thanks to the Port, it can be estimated that the Port of Gdańsk provides a livelihood for over 200,000 people. According to the analysis, around 209,500 people live in households who earn their income from work related to the Port of Gdańsk. This figure includes approx. 69,800 households supported by Port related income comprising single person households, families without children, and families with children (a total of approx. 69,400 dependent children). In 2024 alone, the total value of household income generated as a result of the Port's operations amounted to PLN 8.1 billion¹⁰. This highlights the

Port's significant role as a source of livelihood and, consequently, a stimulus for consumption in many households across the country.

Further indicators confirm the scale of the Port's impact. By comparing the scale of employment generated by the Port's operations with employment in other sectors of the economy, it can be estimated that the number of jobs created through the Port's operations accounts for 64.3% of all jobs in the mining sector in Poland (approx. 130,000 people in 2024)¹¹ and approx. 7.5% of employment in agriculture¹² (1.2 million people).

Impact on economic growth

Added value generated by the Port's activities and in the surrounding area

This section presents an analysis of the Port of Gdańsk's impact on economic growth. The point of reference is gross value added (GVA), which measures the contribution of economic entities to the creation of gross domestic product (GDP). Arithmetically, value added corresponds to total output, less intermediate consumption, i.e. inputs in the form of

goods and services used in the production process. High value added indicates a significant contribution to GDP generation.

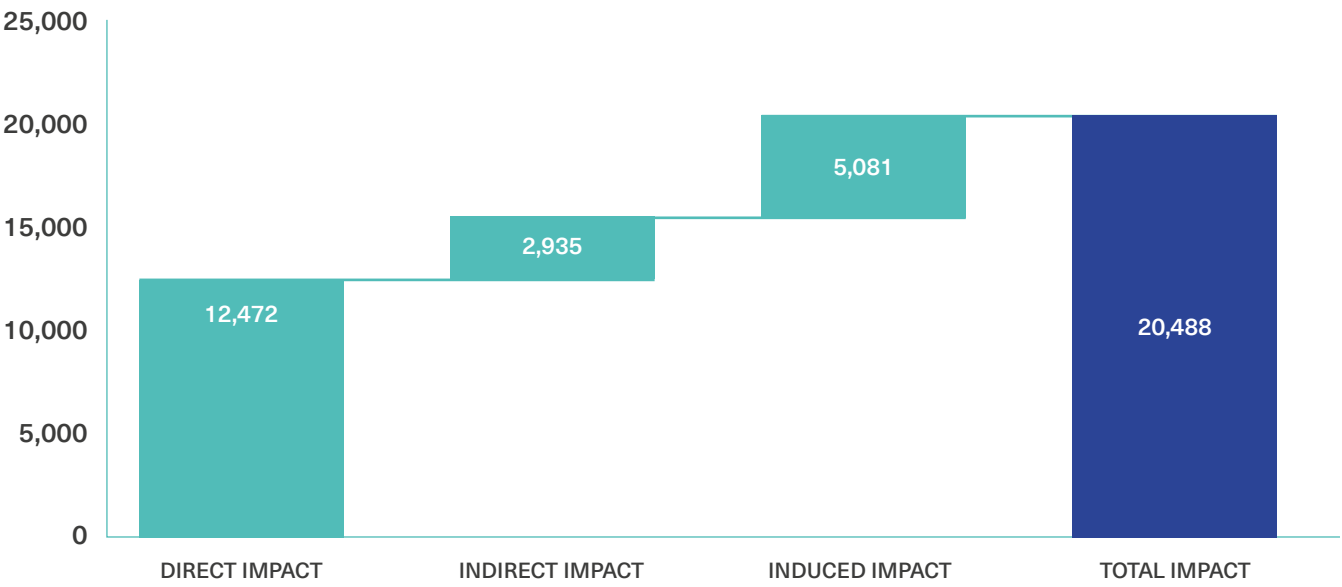
At Level 0, the activities of ZMPG S.A. generated a total of PLN 660 million in value added, of which the direct, indirect and induced effects amounted to PLN 398 million, PLN 103 million, and PLN 159 million, respectively. Port operators (Level 1) accounted for PLN 1.43 billion in value added in

¹⁰ Revenue was estimated using an input-output analysis, by determining the number of jobs created in each PKD (Polish Classification of Activities) section and then applying this figure to the average wages in that section.

¹¹ PKD code, Section B.

¹² PKD code, Section A, part 01

Chart 9. Added value generated as a result of the Port of Gdańsk's operations [PLN million]



Source: own compilation.

2024, of which the direct, indirect and induced effects amounted to PLN 865 million, PLN 211 million and PLN 350 million, respectively. The TFL sector (transport, freight forwarding and logistics) (Level 2) plays the most significant role in the value added structure, with companies in this sector generating as much as 75% of the value added associated with the operations of the Port of Gdańsk; in 2024, this figure amounted to a total of PLN 15.3 billion (of which PLN 9.35 billion resulted from the direct effect, PLN 2.27 billion from the indirect effect, and PLN 3.68 billion from the induced effect).

At the country level (Level 3), the Port's total economic impact in terms of value added amounted to PLN 20.5 billion, which corresponded to 0.63% of the national gross value added in 2024¹³. The scale of the Port's operations is comparable to the added value generated by entire sectors of the economy. To illustrate: the value added generated in connection with the Port of Gdańsk's operations accounts for 47.6% of the value added of the entire mining and quarrying sector (PLN 43 billion) and 22.1% of the value added generated by the agriculture, forestry, hunting and fishing sector (PLN 92.8 billion).

The Port's operations are particularly important for the economy of the Pomorskie region. In 2024, the generated value added amounted to PLN 3.7 billion in Gdańsk, PLN 6.2 billion in the Tri-City and PLN 11.7 billion across the entire Pomorskie Voivodeship. The effect of the Port's contribution to regional GDP stood at just under 6%¹⁴.

Value added generated as a result of the Port of Gdańsk's operations, broken down by specific areas of impact

20,488	Poland
11,683	Pomorskie Voivodeship
6,239	Tri-City
3,730	Gdańsk
PLN million	



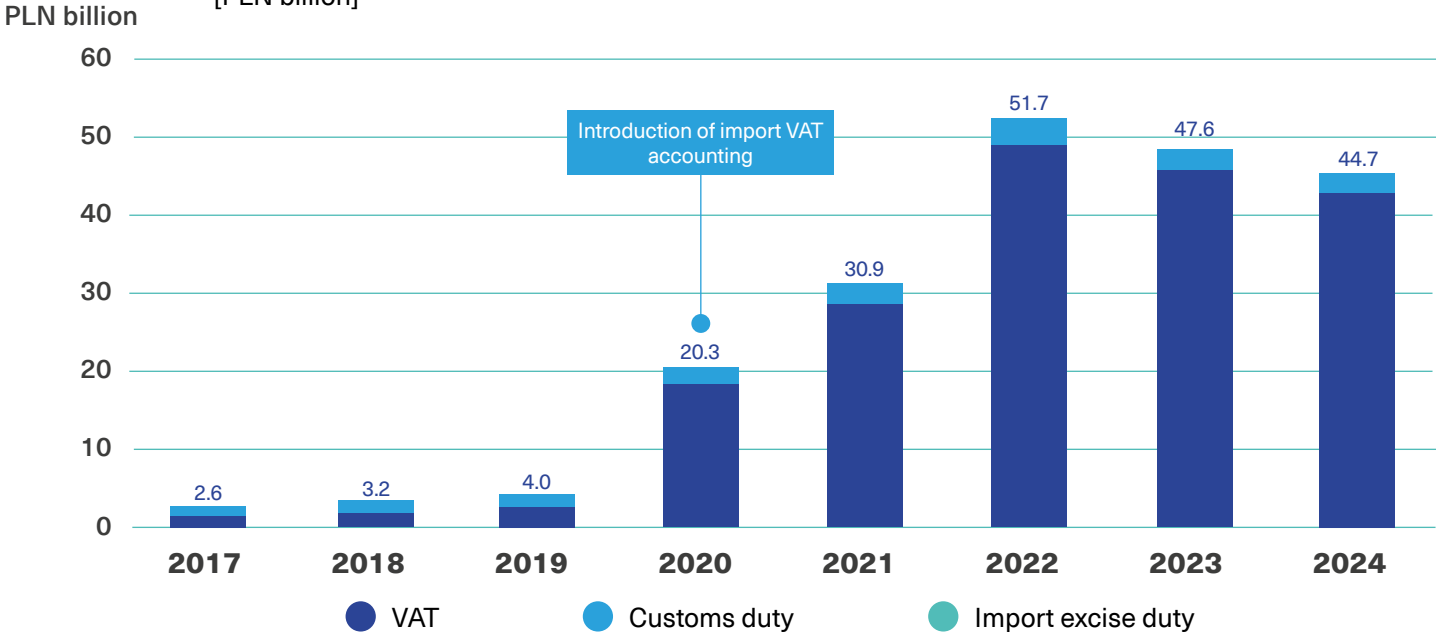
”

At the country level, the Port's total economic impact in terms of value added amounted to PLN 20.5 billion.

¹³ GUS, Sectoral Knowledge Bases, Gross value added by PKD section (preliminary data for 2024)

¹⁴ GUS data, Preliminary estimates of gross domestic product by region in 2023, <https://stat.gov.pl/obszary-tematyczne/rachunki-narodowe/rachunki-regionalne/wstepne-szacunki-produktu-krajowego-brutto-w-przekroju-regionow-w-2023-roku,8,7.html> (accessed: 26 September 2025).

Chart 10. Revenue from customs duties, VAT and excise duties collected at the Port of Gdańsk, 2017–2024 [PLN billion]



Source: National Tax Administration

Impact on public finances

The impact of the Port of Gdańsk on public finances can be analysed from two perspectives. The first concerns taxes and charges related to cargo handling, primarily VAT, customs duties and excise duty on goods passing through the Port. The second perspective concerns taxes generated by entities engaged in port operations and related activities throughout the supply chain.

Tax revenue from goods handled

Goods subject to customs duty, VAT and excise duty enter the country via the Port, thereby contributing to the state budget. The Port's dynamic growth is evidenced by the data on taxes and fees collected, obtained from the National Tax Administration (KAS) and the Pomorskie Customs and Tax Office¹⁵. In 2017, customs offices at the Port of Gdańsk contributed a total of approximately PLN 2.6 billion to the budget, of which PLN 1.7 billion (approx. 63%) was from VAT, PLN 0.97 billion (approx. 37%) from

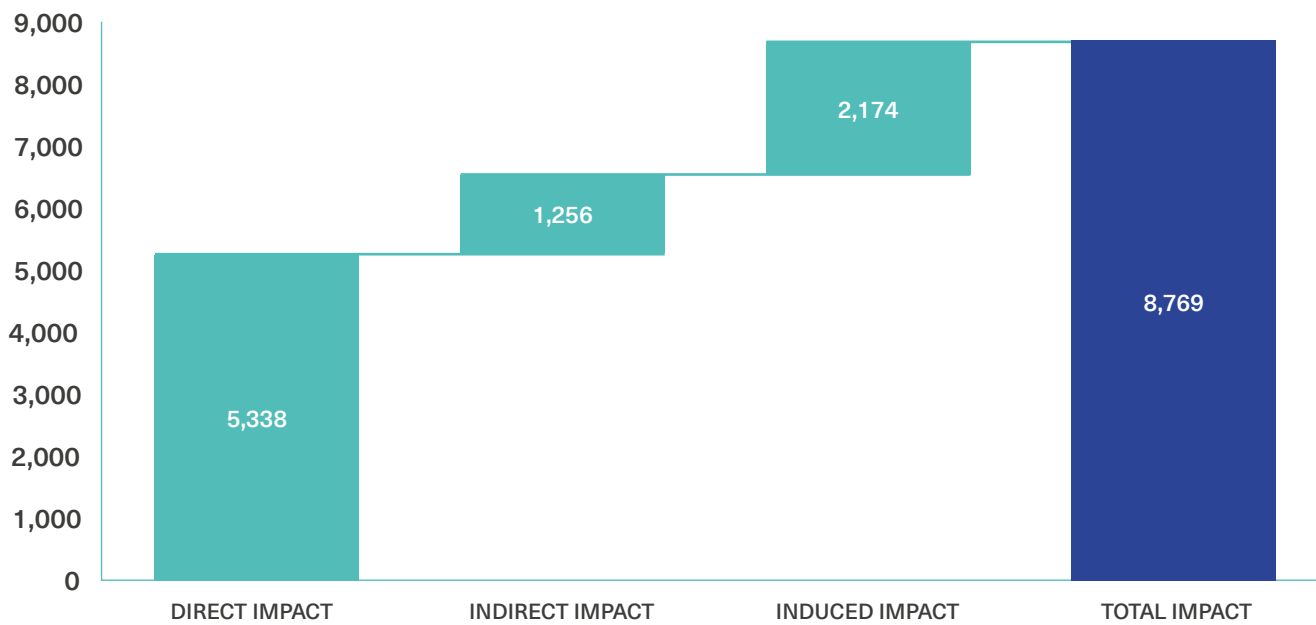
customs duties and PLN 0.6 million (0.02%) from excise duty. At the time, this amount accounted for approx. 0.5% of the state budget revenue. However, with the increase in trade and the introduction of import VAT accounting¹⁶ from 2020 (which reveals the full VAT revenue from imports)¹⁷, these figures have risen significantly. Whilst the increase between 2019 and 2020 is mainly due to regulatory changes, in subsequent years it is directly linked to the Port's rapid growth. In 2022, budget revenues related to the handling of goods at the Port of Gdańsk amounted to over PLN 51.7 billion a figure almost 20 times higher than in 2017. VAT revenues accounted for approx. 94% of total revenues at that time. In 2023 and 2024, however, there was a decline, with revenues reaching approximately PLN 47.6 billion and PLN 44.6 billion respectively (of which approx. 95% was VAT on imports). This was linked to a decrease in the value of imports by 5% in 2023 and 9% in 2024 respectively mainly in the area of coal, which is subject to high tax burdens.

¹⁵ The value of goods (in PLN), as reported by the National Tax Administration, does not take into account the handling of cargo not subject to customs procedures. The difference between the value of cargo handled (in terms of tonnage) according to the data is approximately 15%.

¹⁶ Revenue from VAT accounted for in accordance with Article 33a of the VAT Act.

¹⁷ Until 2020, importers were required to pay VAT at the time of customs clearance, which put a strain on their cash flow. The import VAT accounting scheme introduced in 2020 allowed businesses to account for the tax directly in their VAT return (JPK_V7), rather than paying it to the customs office.

Chart 11. Tax revenue generated as a result of the Port of Gdańsk's operations [PLN million]



Source: own compilation.

Tax revenue generated by the Port's operations and in the surrounding area

When analysing the revenue generated for the public finance sector as a result of the Port's operations, one should consider not only the taxes and charges levied on goods handled, but also those generated by businesses operating within the Port of Gdańsk and its surrounding area. Across Poland as a whole, the total tax revenue generated by the Port of Gdańsk's operations amounted to approximately PLN 8.8 billion in 2024, representing 15% of the state budget's total corporate income tax revenue and 137% of the total bank tax revenue in Poland in 2024¹⁸.

The breakdown of these revenues highlights the dominant role of central government taxes, which amounted to PLN 3.6 billion, or 42% of the total. These primarily comprise CIT, PIT, VAT and customs duties related to foreign trade. The second largest source was social insurance and health insurance contributions, which amounted to PLN 2.78 billion (32% of the total). The third component was local

taxes, which generated PLN 2.35 billion (27% of the total), including, amongst other things, property taxes and local authorities' shares of PIT and CIT.

The Port of Gdańsk is also of vital importance to local government finances. Tax revenue allocated to Gdańsk's budget is estimated at PLN 261 million, accounting for almost 5% of the city's budget, whose total revenue in 2024 is expected to be around PLN 5.4 billion¹⁹. It is worth noting that the total amount of tax revenue linked to port operations exceeds the budget expenditure of the entire Tri-City for 2024, which stood at PLN 7.88 billion²⁰.

The data presented by geographical, institutional and sectoral breakdown demonstrate that the operations of the Port of Gdańsk are an important pillar of public finances at both central and local government levels, while also being a key driver of the Pomorskie economy.

¹⁸ Ministry of Finance, Estimated implementation of the state budget in 2024. (2025), <https://www.gov.pl/web/finanse/szacunkowe-wykonanie-budzetu-panstwa-w-2024-r> (accessed: 26 September 2025).

¹⁹ Public Information Bulletin of the City of Gdańsk, Adopted Budget of the City of Gdańsk for 2024 (2024), <https://www.gdansk.pl/urząd-miejski/sprawozdanie-z-wykonania-budzetu-miasta-gdanska-za-2024-r,a,284155> (accessed: 26 September 2025).

²⁰ Public Information Bulletin of the City of Sopot, Sopot Budget 2024, <https://bip.sopot.pl/a,22357,budzet-sopotu-2024.html> (accessed: 26 September 2025); Data from the Public Information Bulletin of the City of Gdańsk, Adopted Budget of the City of Gdańsk for 2024, <https://www.gdansk.pl/urząd-miejski/sprawozdanie-z-wykonania-budzetu-miasta-gdanska-za-2024-r,a,284155> (accessed: 26 September 2025); Public Information Bulletin of the City of Gdynia, Draft Budget of the City of Gdynia for 2024 and Multi-Year Financial Forecast for the City of Gdynia for 2024–2037, <https://bip.um.gdynia.pl/2024,9028/projekt-budzetu-miasta-gdyni-na-2024-rok-i-wieloletniej-prognozy-finansowej-dla-miasta-gdyni-na-lata-2024-2037,590986> (accessed: 26 September 2025).

Chart 12. Breakdown of taxes generated by the Port of Gdańsk's operations in 2024 [%]



Source: own compilation. Due to rounding, the figures in the chart do not add up to 100%.

Role of the Port of Gdańsk in supporting Poland's foreign trade

The Port of Gdańsk plays a key role as a maritime gateway for Poland's foreign trade. It is Poland's largest seaport in terms of cargo throughput and one of the largest in the Baltic Sea. A significant proportion of Poland's trade in goods, particularly with markets outside Europe, goes by sea. According to data from ZMPG S.A., between 2020 and 2024, a total of approx. 283 million tonnes of cargo (combined exports and imports) passed through the Port. In 2024, the Port of Gdańsk handled a total of 77.4 million tonnes of cargo, which was slightly lower (by approx. 4.4%) than the record 80.9 million tonnes in 2023²¹. This decline was mainly due to a reduction in coal imports following the peak in supplies in 2022–2023. However, if coal is excluded (which was imported in previous years as an emergency measure due to the energy crisis), the overall tonnage handled in 2024 was comparable to, and even slightly better than, the previous year. **The cargo mix shifted clearly towards goods with higher added value**, with liquid fuels (crude oil and petroleum products) accounting for over half of the total tonnage. **In 2024, Naftoport at the Port of Gdańsk, Poland's only oil terminal, handled a record 38.8 million tonnes of crude oil**²²,

underscoring the Port's strategic importance to the country's energy security. At the same time, the volume of containerised general cargo handled continued to rise, with containerised cargo once again reaching record levels. **In 2024, the Port of Gdańsk handled 2.25 million TEU** (20-foot containers), **up by about 10% on the previous year**²³. The Gdańsk container terminal (Baltic Hub) remains the largest in the Baltic Sea and handles nearly 70% of the country's container throughput, making it Poland's main gateway for the import and export of containerised goods. In addition to liquid fuels and containers, the Port also handles significant volumes of bulk cargo (grain, metal ore, chemicals) and Ro-Ro.

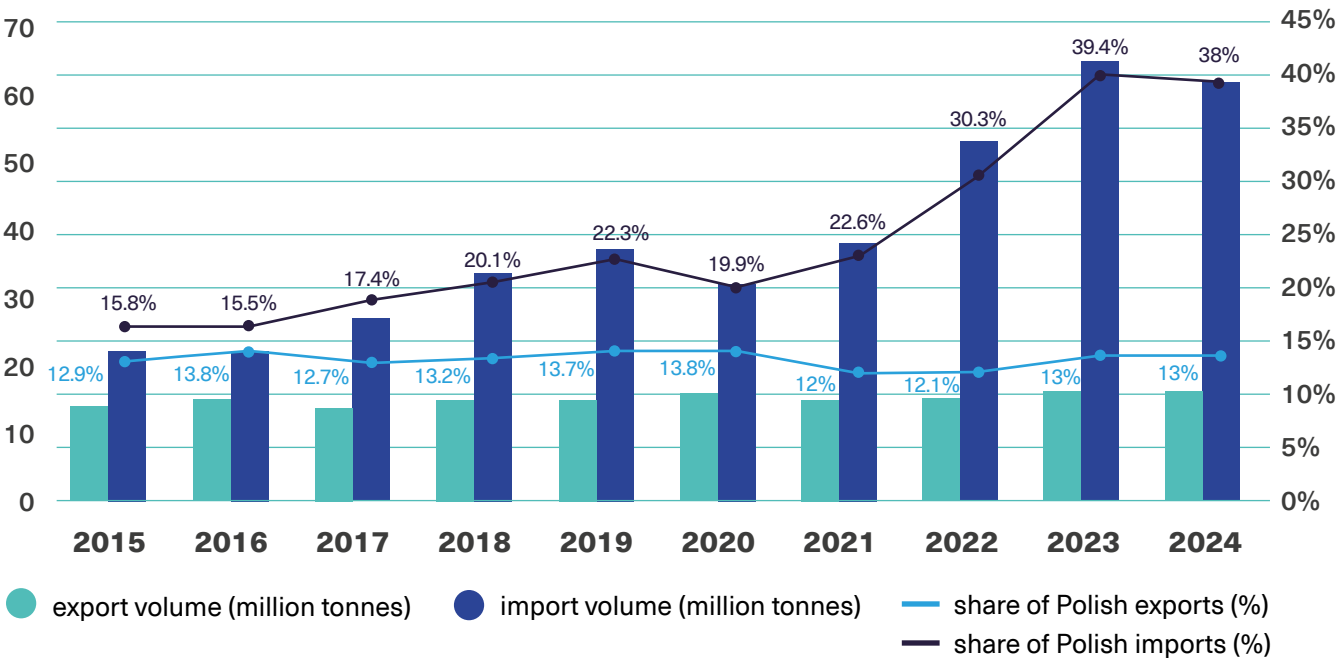
The importance of the Port of Gdańsk is evident not only in the volume but also in the value of the cargo it handles. Data on the value of cargo handled are sourced from the National Tax Administration (KAS). It should be noted that the KAS data on export and import volumes do not correspond to the data on cargo volumes handled (presented in the first chapter) because not all goods passing through the Port are subject to customs procedures within the Port Area.

²¹ Data provided by the Port of Gdańsk Authority S.A.

²² Ibid.

²³ Ibid.

Chart 13. Exports and imports at the Port of Gdańsk, 2015–2024 [million tonnes]



Source: compiled based on data from ZMPG S.A. and GUS

There is also a free zone within the Port²⁴. In 2024, goods with an estimated value of approximately PLN 244 billion passed through the Port, comprising approx. PLN 201 billion in imports and PLN 43 billion in exports (see Annex 2 for detailed figures). For comparison, the total value of Polish foreign trade in 2024 amounted to approx. PLN 3.03 trillion. This means that the Port of Gdańsk handled around 8% of the value of Poland's total trade in goods. This share is particularly high on the import side, with over 13% of the value of Polish imports in 2024 having arrived via the Port of Gdańsk. This is due to the fact that the Port is a key entry point for strategic raw materials such as crude oil, fuels and gas, as well as coal and metal ores. The year 2022 marked a key turning point in the growth of the volume of raw materials handled. At that time, the volume of oil and petroleum products handled at the Port of Gdańsk reached 25 million tonnes (a 35% year on year increase), and coal 13.2 million tonnes (a 175% year on year increase, of which 12.5 million tonnes were imports), which was directly linked to pipeline supplies from the East being replaced by maritime imports. In 2023, the share of energy carriers namely coal and fuels in imports reached a record 76%. In doing so, the Port of Gdańsk

ensured the country's energy security in the face of the crisis in eastern markets. This share continues to steadily increase for fuels, such as crude oil, gas and petroleum products. In 2024, this category accounted for 63% of the tonnage of imports.

The Port of Gdańsk's share of Poland's exports is also growing steadily, although it started from a lower base than Polish imports, which for years have relied largely on imports of energy resources. Historically, Polish exports often reached distant markets indirectly (e.g. via western ports and German intermediaries). Currently, however, an increasing volume of Polish exports is handled directly by the Port of Gdańsk, particularly in the containerised general cargo segment. Container exports (e.g. food and food products) have increased at the Port by approx. 40% over the past 5 years²⁵. The port is becoming increasingly important as a shipping hub for Polish manufacturers of food, chemicals, furniture and industrial products destined for markets outside Europe. For example, a specialised sugar terminal and a large refrigerated export warehouse have been built at the Port of Gdańsk, enabling the efficient shipment of Polish food products²⁶. Such investments by exporters indicate that domestic businesses

²⁴ The free zone at the Port of Gdańsk is used primarily for re-export purposes, allowing goods from outside the European Union to be stored and processed without the need to pay customs duties or other charges at that stage, and subsequently exported outside the EU.

²⁵ Data provided by the Port of Gdańsk Authority S.A.

²⁶ Data from the Port of Gdańsk website – Vistula Quay: <https://www.portgdansk.pl/port/terminale-i-nabrzeza/nabrzeze-wislane/> (accessed: 26 September 2025).

are increasingly keen to use the Port of Gdańsk as a gateway to the world. Although its share of the value of Polish exports currently stands at just a few percent, a clear upward trend is evident. The Port of Gdańsk is rapidly expanding its network of direct oceanic connections, strengthening its role as a key hub for Polish exports. The Port of Gdańsk is already the largest container port in the Baltic Sea, outpacing its regional competitors and consolidating Poland's position within global supply chains. It is also worth noting that in August 2025, the Port of Gdańsk joined the group of European ports offering direct container services to the United States²⁷. The Port also ranks 2nd in the Baltic Sea in terms of total cargo handling (surpassed only by the Russian port of Ust-Luga).

Impact of the investments on the Port of Gdańsk's role in trade

The Port of Gdańsk's significant role in supporting Poland's foreign trade would not have been possible without years of investment in infrastructure and the expansion of handling capacity. The Port entered a period of rapid growth after 2007, following the launch of the DCT (now Baltic Hub). In the years that followed, a number of strategic projects were completed: the fairway was dredged, the quays and storage yards were modernised, and the road and rail network connecting the Port to inland areas was expanded. Between 2009 and 2016, projects included the construction of the Gdańsk Southern Ring Road and Sucharski Route, as well as the modernisation of the railway line to the Northern Port. **In the period 2017–2022 alone, the total value of investments carried out by the Port of Gdańsk Authority and external entities (business partners, the Maritime Authority, PKP PLK) exceeded PLN 4.8 billion²⁸. At the same time, since 2023, further projects worth over PLN 4.2 billion have been completed or are currently underway** (including terminal expansion, new turntables, a grain terminal, infrastructure for offshore wind farms, etc.)²⁹. The effects of these investments are clearly evident in the Port's capacity to handle growing trade volumes. By modernising its infrastructure, the Port of Gdańsk was able to safely take over the import of raw materials in 2022 that had

previously reached Poland via other routes (e.g. coal from the east). The modernised quays and storage yards led to an increase in cargo handling volumes. For example, in the inner part of the Port, the volume of goods handled rose from 9 million tonnes to 15 million tonnes per year following the completion of the modernisation. When comparing the figures, in 2020 the Port of Gdańsk accounted for approx. 5% of the value of Polish foreign trade (calculated globally), and after several years of intensive investment and a favourable economic situation, this share rose to approx. 8% (2022–2023). **Rough estimates suggest that every billion zlotys invested has translated into an increase in the Port of Gdańsk's share of domestic trade by around 1-2 percentage points.** For example, the modernised quays and storage yards led to an increase in cargo handling volumes; in the inner part of the Port, the volume of goods handled rose from 9 million tonnes to 15 million tonnes per year following the completion of the modernisation.

It is worth taking a closer look at the detailed data on the impact of ZMPG S.A.'s investments. These show that the growth rate of the Port of Gdańsk's share of Polish foreign trade has been volatile alongside years of significant growth, such as 2018 (+1.9 p.p.) and, in particular, 2022 (+4.7 p.p.), there were also periods of decline, such as in 2020 (-1.5 p.p.). Despite these fluctuations, the overall trend remains clear: successive investment projects have consistently strengthened the Port's position. Moreover, the return on investment ratio shows that during periods of economic prosperity, even relatively modest expenditure could translate into a significant increase in Gdańsk's share of domestic trade.

Recent increases in cargo handling volumes (driven, among other things, by the geopolitical situation) have occurred without the need for immediate new infrastructure investment. This demonstrated that earlier development projects had created a capacity buffer, enabling the Port to quickly absorb the additional cargo traffic. At the same time, further growth in cargo handling at the Port will require increased handling capacity through the implementation of a number of key infrastructure investments.

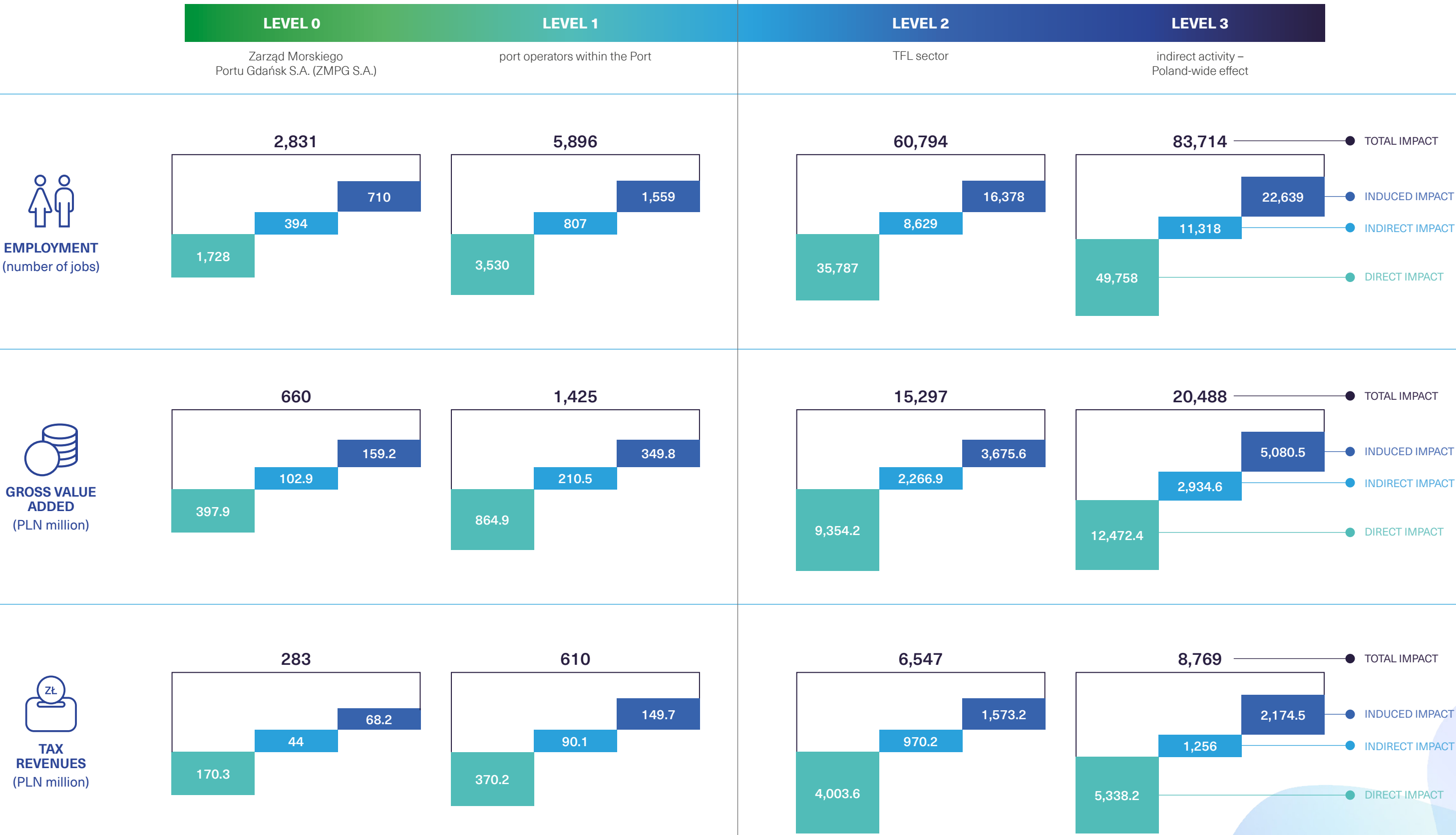
²⁷ Data from the Port of Gdańsk website – Port of Gdańsk launches a new transatlantic service: <https://www.portgdansk.pl/wydarzenia/port-gdansk-z-nowym-serwisem-transatlantyckim-msc-uruchamia-bezposrednie-polaczenie-do-usa/> (accessed: 26 September 2025)

²⁸ Data from the Port of Gdańsk website, 68.2 million tonnes – the Port of Gdańsk has broken yet another record <https://www.portgdansk.pl/wydarzenia/682-mln-ton-port-gdansk-pobil-kolejny-rekord/> (accessed: 26 September 2025).

²⁹ Ibid.



Results of the analysis of the impact of the Port of Gdańsk's activities using the Leontief model



The figures shown in the infographic may not add up due to rounding.

Looking to the future:

An analysis of trends affecting the operations of the Port of Gdańsk



In the face of dynamic economic, technological, regulatory and geopolitical changes, seaports are no longer viewed solely as elements of transport infrastructure.

Their role is becoming increasingly strategic as key actors influencing national security, competitiveness and sustainable development. The Port of Gdańsk, as one of the most important ports in the Baltic Sea region, is facing a number of challenges and opportunities that will shape its future in the coming years. Here we present selected key trends that will determine the direction of the Port's development

and operations, as well as examples of good practice from other countries whose ports have achieved a high level of development and innovation. The trends and examples of good practice described in this section have been identified on the basis of an analysis of strategic documents and legal acts, a review of industry literature, and expert consultations. In preparing this section, we considered, amongst other things, the development directions indicated by EU institutions, national programmes and local government strategies, as well as the experiences of ports regarded as leaders within the European Union.

1

Growing importance of global supply chains and the development of international trade

According to UNCTAD estimates, in 2024 maritime transport handled almost 13 billion tonnes of cargo³⁰. Forecasts for the coming years point to a further increase in this volume, which will result in a greater workload for seaports, including the Port of Gdańsk. **The growing importance of global supply chains and the expansion of international trade mean that seaports are becoming not only cargo-handling points, but also key links in the economic and energy security systems of countries.** Changing consumption patterns, the rise of e-commerce, shorter production cycles and growing expectations regarding the speed and reliability of deliveries mean that ports must invest in automation, digitisation and integration with supply chain management systems.

The current economic situation and changing geopolitical and trade conditions present a unique development opportunity for the Port of Gdańsk.

Being among the largest ports in Europe, the Port of Gdańsk has the potential to fulfil a dual role. On the one hand, it can continue to handle cargo from outside the continent and channel it to Central European countries, such as the Czech Republic, Slovakia, Hungary and Ukraine. Interestingly, in 2024 alone, over 3.2 million tonnes of cargo from Ukraine passed through the Port of Gdańsk, of which as much as 70% was containerised cargo³¹. It is worth noting that the Port of Gdańsk has grown significantly in importance following the reorganisation of European trade routes, a consequence of the sanctions imposed on Russia and geopolitical changes. To fully leverage this potential, **further investment in the Port's infrastructure is essential, including the construction of a new railway line and a second bridge to Port Island, which accounts for over 80% of cargo handled at the Port.** Currently, all rail traffic passes via a single bridge, which poses a risk to the continuity of operations.

³⁰ UNCTAD (2024) Review of Maritime Transport 2024: Navigating maritime chokepoints. https://unctad.org/system/files/official-document/rmt2024_en.pdf (accessed: 26 September 2025).

³¹ Management report of Zarząd Morskiego Portu Gdańsk S.A. for 2024, p. 6.

Expanding rail and intermodal infrastructure is essential for ensuring the efficient transport of containers to their destination markets in Central Europe. By taking action in these areas, the Port

of Gdańsk has a real opportunity to become the region's main cargo-handling hub, strengthening Poland's position within the European logistics and trade system.

2

Development of transport infrastructure and investments in the Port's surrounding area

From the perspective of trading partners, the speed at which goods reach their destination and the quality of available transport links directly affect the total cost of transport, and thus the attractiveness of countries with ports. Currently, rail connections in Poland as in many other countries still rely on infrastructure built in the 19th century, meaning that many elements of the rail system are still not up to modern standards. The railway is being modernised, but there are still limitations on the capacity and efficiency of the connections with the Port of Gdańsk, which may affect the pace at which growing cargo volumes are handled. An opportunity for the Port is the planned construction of the Northern Central Railway Line, which will connect Gdańsk with the Central Transport Hub. The new railway line, designed to accommodate freight trains travelling at speeds of up to 120 km/h, is intended to enable the rapid and efficient transport of containers further inland. Currently in the analysis and consultation phase, the project will complement the existing infrastructure, ensuring better connectivity between regions. It is planned to be completed by 2040. As few countries use high speed lines for freight transport, this investment could significantly boost the Port's competitiveness in the long term.

Europe's largest ports maintain their position due to, among other things, efficient rail links with other countries. From the port of Rotterdam, goods can reach 11 European countries by rail, many of them in less than 24 hours. Such fast transit times are possible for distant locations in neighbouring Germany, such as Munich and Frankfurt (Oder), as well as cities

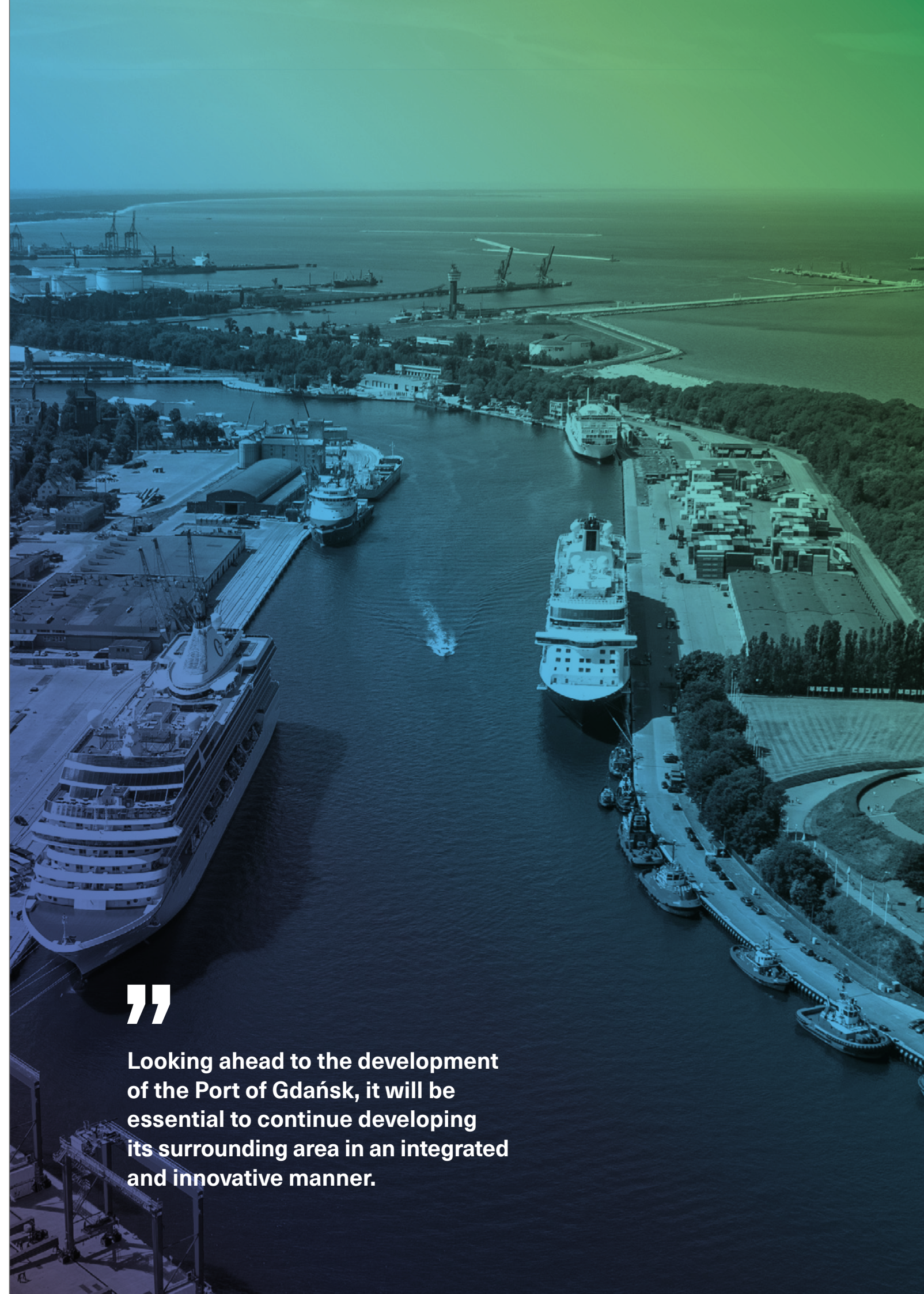
in the Czech Republic and Switzerland. As part of the Rail Connected³² programme, the Dutch port aims to increase the rail share of freight by 50% and to fully digitise logistics processes, aiming to improve the efficiency, transparency and reliability of rail transport. It is now essential not only to invest in physical access to ports, but also to automate the rail and unloading systems in order to fully exploit their potential.

Investments in road and intermodal infrastructure are also crucial for improving the Port's accessibility.

The expansion and modernisation of access roads, including ring roads, flyovers and road junctions, aims to streamline heavy goods traffic and reduce congestion within the Tri-City agglomeration. At the same time, the importance of intermodal terminals is growing, as they enable seamless transloading across sea, rail and road transport. In an era of growing pressure to decarbonise logistics and digitise supply chains, the development of such facilities is becoming not only a response to market needs, but also a key component of a sustainable development strategy.

Looking ahead to the development of the Port of Gdańsk, it will be essential to continue developing its surrounding area in an integrated and innovative manner. Investments are needed in smart industrial parks, automated distribution centres and highly digitised industrial zones, which will support the handling of growing cargo volumes and the development of modern industries. It is worth following the example of the solutions used in such ports as Hamburg or Antwerp, where the

³² **Rail Connected** is a Dutch initiative supported by the Ministry of Infrastructure and Water Management and the Rotterdam Port Authority. It is part of a wider package of measures to develop rail transport in the Netherlands. Its main objective is to improve data exchange between carriers, rail operators and terminals, which translates into greater operational efficiency, improved coordination and more sustainable freight transport. The project focuses on digitising logistics processes, integrating IT systems and promoting rail as a competitive mode of transport within and beyond the port.



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Looking ahead to the development of the Port of Gdańsk, it will be essential to continue developing its surrounding area in an integrated and innovative manner.

ports' surroundings serve as an integrated innovation hub, linking industry, logistics, education and research. In the context of the future of the Port of Gdańsk, it is essential to strengthen cooperation between local authorities, technical universities, investors and port operators in order to create an environment conducive to the implementation of new technologies, process automation and the development of the necessary skills.

In the context of investments, the aforementioned PCI, PCL and the 'Ku Ujściu' Industrial Park, managed by GARG, will play a significant role. It is worth noting that these areas are not intended solely for entities from the TFL sector. They also provide space for industrial investment across a range of sectors. The Port of Gdańsk, a key driver of industrial development in the region, naturally supports the development of these areas, and GARG's efforts to facilitate investment opportunities within the administrative boundaries of the Port of

Gdańsk are part of the long-term strategy to build a comprehensive economic ecosystem for the Port. A key element of this development will be close cooperation between ZMPG S.A. and the City of Gdańsk, as well as thoughtful, long-term investment planning that takes into account the limited availability of land and the need to use it effectively.

Furthermore, in order for the Port of Gdańsk to effectively handle the increasingly frequent heavy and oversized cargoes, it is essential to provide infrastructure that enables their efficient transport. This requires suitably equipped quays, storage yards, cargo handling equipment and logistics facilities that will allow for the safe and efficient execution of such operations. It is also essential to provide and maintain internal roads suitable for the transport of heavy cargo. Such investments will enhance the Port's capacity to handle the most demanding industrial projects.

3

Sustainable development and the greening of maritime transport

The hitherto dominant role of coal and fuel terminals within the Port of Gdańsk is giving way to new solutions that align with the objectives of the energy transition and decarbonisation. In view of dwindling fossil fuel reserves and the implementation of Poland's and the European Union's climate policies, measures are being taken within the Port of Gdańsk to develop infrastructure supporting renewable energy sources. One example is the construction of an installation terminal for offshore wind farms, being carried out by the Istrana special purpose vehicle at Baltic Hub. The investment, worth PLN 1.18 billion, is due to be completed by the end of 2026 and will serve as a key element in supporting offshore projects in the Baltic Sea. The terminal will enable the servicing of installation vessels, the storage of components, and their assembly and transport to sea, supporting the achievement of Poland's energy targets: 5.9 GW of installed offshore capacity by 2030 and 11 GW by 2040.

Decarbonising maritime transport is one of the greatest challenges facing the shipping sector, and its implications also affect the Port of Gdańsk. In accordance with the regulations contained in the FuelEU Maritime³³ regulatory package, from 1 January 2030, all container ships and passenger ships over 5,000 GT calling at ports in the EU core network will be required to use onshore power supply (OPS) or equivalent zero-emission solutions whilst berthed at the quay. At the same time, AFIR³⁴ requires Member States to provide OPS infrastructure in TEN-T ports, which includes the Port of Gdańsk. By the end of 2029, these ports must be equipped to provide onshore power to at least 90% of calls by container ships and passenger ships meeting specific tonnage and call frequency criteria. **Another important aspect is the inclusion of maritime transport in the EU ETS** (European Union Emissions Trading System). From 2024, shipowners will be

³³ Regulation (EU) 2023/1805 of the European Parliament and of the Council.

³⁴ Regulation (EU) 2023/1804 of the European Parliament and of the Council.

required to account for CO₂ emissions from ships calling at EU ports, and this will gradually be extended to other greenhouse gases. The rise in emission costs may negatively impact the competitiveness of maritime shipping relative to other modes of transport, particularly on short-haul routes.

The development of the OPS infrastructure at the Port of Gdańsk is essential not only to meet environmental requirements, but also to maintain the maritime port status within the TEN-T network. The FuelEU Maritime, AFIR and EU ETS regulations directly affect the development strategy for seaports in the European Union, necessitating investment in a zero-emission infrastructure, the modernisation of quays and the adaptation of port services to new environmental standards. Ports that fail to adapt to these requirements may lose their appeal, particularly in the face of growing demands for emissions reductions and the availability of shore power. As a result, implementing green solutions is becoming not only a regulatory obligation but also a key element of a long-term strategy for the competitiveness and sustainable development of ports in the EU.

The Port of Gdańsk is currently carrying out projects to install an OPS system at the Baltic Hub quay, which handles container ships, and the Westerplatte Ferry Terminal (TPW), intended for passenger vessels (ferries and cruise ships). This project aims to prepare the Port's infrastructure to handle modern vessels in accordance with the European Union's climate requirements, aligning the Port of Gdańsk with the standards at other EU ports, such as the Port of Hamburg and the Port of Rotterdam, where the OPS system has already been implemented. Nevertheless, a significant challenge associated with implementing the OPS system remains the high demand for electricity, which may lead to overloading of local transmission networks. Therefore, investment is needed to expand the electricity infrastructure and develop local renewable energy sources, such as renewable energy installations and energy storage facilities.

Importantly, the Port of Gdańsk's plans and ambitions regarding the green transition are in line with the objectives of the EU's Sustainable Blue Economy and the national Programme for the Development

of Polish Seaports by 2030³⁵, which promote their role as key logistics hubs and leaders of the energy transition in the region. These measures are also consistent with the climate objectives of local and regional authorities. The City of Gdańsk, as part of its 'Green City' strategic programme, aims to increase resilience to climate change, improve air quality, develop the circular economy and raise residents' environmental awareness. Meanwhile, the Pomorskie Voivodeship, as part of the 'Pact for Pomorskie', has set itself the role of a leader in the energy transition in Poland. **The region has focused on developing offshore wind energy and increasing energy efficiency.**

The Port of Gdańsk can therefore capitalise on its potential to develop environmentally friendly technologies, including green hydrogen, which could become one of the key fuels of the future in maritime transport. The seaport in Klaipėda serves as an inspiring example, having been the first in the Baltic region to begin constructing infrastructure for the production and refuelling of green hydrogen. The 2.25 MW plant is set to produce 127 tonnes of hydrogen annually, with commissioning planned for 2026. An OPS system, powered by renewable energy, is also being implemented in Klaipėda, which increases the port's competitiveness and reduces its carbon footprint.

**From
1 January 2030,**



all container ships over 5,000 GT and passenger ships calling at EU ports will be required to use OPS technology or equivalent zero-emission solutions whilst berthed.

The Port of Gdańsk is currently carrying out projects to fit the Baltic Hub quay, which handles container ships, and the Westerplatte Ferry Terminal (TPW), intended for passenger vessels, with an OPS system.

³⁵ Resolution No. 100 of the Council of Ministers of 17 September 2019 on the adoption of the programme entitled 'Programme for the Development of Polish Seaports by 2030'.

Growing role of ports in strengthening national resilience

Trade security

Poland's logistics system is based on four main modes of transport: road, rail, sea and air. Road transport dominates domestic freight transport due to the dense road network and operational flexibility. Rail transport is significant in bulk and container freight, particularly over longer distances. Air transport mainly serves express shipments and high-value goods. Sea transport, although less visible in day-to-day domestic trade, is a strategic pillar of Poland's logistics on an international scale, as it is crucial for the import of energy resources, food, timber and industrial goods, as well as for the export of domestic products to global markets.

Access to seaports, especially the Port of Gdańsk, is fundamental to Poland's trade security. Disruptions to its operations could seriously jeopardise the continuity of supply chains and affect price stability on the domestic market. In the face of growing geopolitical uncertainty and trends towards economic isolationism, Poland should strive to increase its trade independence. Although ports in Germany or Lithuania may serve a complementary role, they should not replace Poland's own port infrastructure. Investments in the development of the Port of Gdańsk contribute to Poland's economic sovereignty and resilience to external market turbulence. It is also crucial to integrate all modes of transport road, rail, sea and air into a coherent logistics system that will ensure flexibility and security of supply.

Energy security

Poland's seaports, and in particular the Port of Gdańsk, play a key role in ensuring the country's energy security. Currently, almost all crude oil imported into Poland arrives via Gdańsk's Naftoport. Without it, supplies of crude oil to domestic refineries would be severely disrupted, which could result in limited availability of fuel at petrol stations across the country. In 2024 alone, Naftoport received 489 tankers and handled almost 40 million tonnes of crude oil and liquid fuels, and its operational capacity is being gradually expanded. However, with the ongoing energy transition, the Port's operations are undergoing significant change. One of the observed trends is a decline in coal handling volumes at the Port of Gdańsk by approx. 41% between 2023 and 2024 (from 13.3 million tonnes to 7.8 million tonnes), which may be the result of both market conditions and the changing energy mix, with liquid fuels, LNG,

LPG and biomass gaining in importance. It is worth noting that this phenomenon stems not only from the Europe wide trend towards decarbonisation, but also from administrative decisions, such as the ban on coal imports from abroad announced by the Ministry of Industry, aimed at stabilising the domestic market and utilising surplus stocks.

In light of the growing role of LNG in shipping, the Port of Gdańsk is developing both its bunkering services and strategic investments in gas infrastructure. In addition to traditional fuels, vessels can be bunkered with liquefied natural gas (LNG) using the truck-to-ship method, which employs mobile solutions ensuring operational flexibility and safety. Furthermore, a key project is currently under construction at the Port of Gdańsk the aforementioned floating LNG terminal (FSRU), which will enable the diversification of gas

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Access to seaports, especially the Port of Gdańsk, is fundamental to Poland's trade security.

supplies and significantly increase the resilience of the national energy system.

Another key element in strengthening Poland's energy security is the Orlen Group's maritime transfer terminal, built within the Port of Gdańsk. The investment, worth approximately PLN 500 million, will enable the handling of up to 2 million tonnes of products per year, including bio-components for biofuel production, low-sulphur MGO (*Marine Gas Oil*) and refinery intermediates. The terminal will provide direct access to the sea for the Gdańsk refinery, which will improve logistical efficiency and diversify supply routes.

At the same time, ports are taking on a new role in supporting the development of renewable energy sources, particularly offshore wind power. An installation terminal for offshore wind farms is being built at the Port of Gdańsk, which will handle large-scale turbine components requiring specialist infrastructure, including reinforced quays, assembly yards, mooring systems, as well as power supply facilities, comprising new power stations and high- and medium-voltage lines. These investments are highly complex in terms of technology and logistics, and require the coordination of numerous entities and access to modern energy management systems.

Food security

The Port of Gdańsk is playing an increasingly important role in ensuring Poland's food security, particularly in the context of such global crises as the COVID-19 pandemic and disruptions to supply chains. The importance of the Port of Gdańsk stems from the fact that it is home to a number of entities involved at various stages in the production, distribution and transport of food products. The experience of 2020–2022 has shown how easily shortages of food and essential goods can arise if there are a lack of efficient import and export channels. In response to these challenges, a modern grain terminal (GAT – Gdańsk Agro Terminal) is being built at the Port of Gdańsk, which is set to increase handling capacity to almost 3 million tonnes per year and enable the storage of up to 152,000 tonnes of grain, feed or meal. This investment is of key importance not only for the export of agricultural surpluses, but also for food imports in crisis situations.



GAT (Gdańsk Agro Terminal)

A modern grain terminal is being built at the Port of Gdańsk, which is set to increase handling capacity to almost

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of grain, feed or meal.

Additionally, the Port of Gdańsk is investing in the implementation of an OPS system, which will enable ships to be powered from the shore, reducing emissions whilst at berth. In the context of growing regulatory requirements such as FuelEU Maritime, AFIR and the EU ETS, seaports must not only modernise their infrastructure but also redefine their role from traditional transfer points to strategic energy hubs, supporting decarbonisation, national energy security and the development of modern technologies in the maritime sector.

In an era of climate change and increasingly frequent extreme weather events, local food production is becoming more vulnerable, and ports are an essential component of crisis management. **With an expanded infrastructure and integration with the rail network, the Port of Gdańsk can serve as a food security buffer for Poland and the Central and Eastern European region.** Furthermore, the development of the Gdańsk Agro Terminal aligns with a broader strategy to strengthen the country's resilience in the event of disruptions to global trade. In this way, the Port of Gdańsk not only supports agricultural production and exports in Poland and the region, but also protects consumers from the effects of product shortages and rising food prices.

Defence

The Baltic ports, including the Port of Gdańsk, are becoming increasingly important strategically for the defence of Poland and the entire region. **The risk of sabotage or disruption to the supply of energy or military equipment means that seaports must be treated not merely as elements of transport infrastructure, but as facilities of critical importance to national and allied security.** In addition to the physical protection of infrastructure, this also requires advanced cybersecurity systems and the ability to respond rapidly to hybrid threats to be developed.

The Port of Gdańsk already plays a supporting role in NATO operations. In April 2025, 11 warships from 7 NATO member states called at the port as part of Operation Baltic Sentry, with the aim of protecting the underwater energy and telecommunications infrastructure in the Baltic Sea. NATO vessels carry out rotational missions, patrolling areas particularly vulnerable to sabotage, including those near gas pipelines and power cables. The Port of Gdańsk also plays a key role in the logistics of delivering support to Ukraine. It is through this port that shipments of military and medical equipment, as well as humanitarian aid, are carried out, making the Port a vital link in the regional security system. The war in Ukraine has clearly demonstrated the importance of efficient military logistics and the ability to rapidly deploy resources. As a frontline NATO country, Poland must have ports capable of handling large volumes of military and civilian cargo.

Amid the growing geopolitical and hybrid threats, the role of dual-use infrastructure that is, civilian facilities adapted for defence purposes is becoming particularly important. In practice, this means planning the development and modernisation of the Port of Gdańsk in such a way that it can effectively support both commercial and military operations without disruption to its core activities. In particular, the Port of Gdańsk should consistently strengthen its capacity to move troops, equipment and supplies quickly and safely as part of national and allied operations, in line with the concept of military mobility. This term refers to the capacity of transport infrastructure to provide efficient and interoperable support for defence activities, including exercises, NATO missions and crisis response. This encompasses both the physical parameters of the Port (e.g. quay load-bearing capacity, ramp availability, storage facilities) as well as organisational and digital

aspects. Of key importance is also the development of cooperation with the Alliance through mechanisms, such as HNS (Host Nation Support), i.e. support provided by the host nation to allied forces operating on its territory. In parallel, investment is needed in infrastructure that complies with the requirements of European regulations, such as TEN-T, AFIR, CER and NIS2. These frameworks not only define ports as sites of strategic importance, but also facilitate access to funding for projects that enhance their resilience, interoperability and security both physical and digital. Ports in Western Europe, such as Rotterdam and Antwerp, are already implementing contingency plans. They are reserving space for military vessels, planning the diversion of goods and cooperating within NATO to ensure the continuity of supplies in the event of a conflict. The Port of Rotterdam, despite lacking a dedicated military quay, is coordinating its activities with the Port of Antwerp, which regularly handles shipments for US forces stationed in Europe. Given Poland's geopolitical position, it is essential that the Port of Gdańsk has a comprehensive contingency plan in the event of an armed conflict. This involves both developing logistical support facilities for the armed forces and integrating with NATO systems.

The Port's readiness to fulfil a military role is crucial for ensuring allied support and the defence of the Alliance's eastern flank.

Recommendations

for enhancing the social and economic impact of the Port of Gdańsk's operations



1



Development of the Port's operations

Investments aimed at expanding the Port of Gdańsk's operations are a response to growing market demand and the Port's strategic development objectives. The Port's area is being gradually expanded, and a number of infrastructure projects are being carried out within it, with the aim of enhancing its operational and logistical capabilities. One example is the T3 terminal, which opened in June 2025 and has enabled the Port's handling capacity to be increased to 4.5 million TEU per year. At the same time, construction of the PLN 1.18 billion T5 terminal is underway, intended to serve as an installation base for offshore wind farms being built in the Baltic Sea in response to growing market demand, whilst ensuring that the infrastructure meets the requirements of sustainable development and efficient land use. These are examples of sound investments, the completion of which directly translates into increased competitiveness for the Port and greater appeal to international partners. Such measures should be continued and coordinated in the long term, taking into account both environmental requirements and the limited availability of land, as well as the stakeholders' expectations. It is recommended that further investments be made in the expansion of the Port's infrastructure, including terminals, quays and operational facilities, which will enable a further increase in the scale of cargo handling operations and the development of the Port of Gdańsk's logistics functions.

2



Diversification of trade routes

The Port of Gdańsk currently operates regular shipping services to over 40 ports in 21 countries around the world. Despite this impressive reach, further expansion of trade routes particularly to include regular ocean services to ports in Asia and the Americas is crucial to enhancing the competitiveness of Poland's exports and imports. To effectively achieve this goal, it is recommended that promotional and networking activities on the international stage be intensified. The Port of Gdańsk should take part in the most important trade fairs, conferences and business events that provide opportunities for direct contact with shipowners, terminal

operators and representatives of foreign ports. The Port's representatives should focus on events where the latest technological solutions are showcased and the future of the maritime economy is discussed. It is also worth organising trade missions and B2B meetings, and collaborating with institutions that support export promotion and the development of international relations, such as regional development agencies, chambers of commerce and industry organisations.

3



Resilience and strategic security

In light of the ongoing geopolitical tensions, the Port of Gdańsk, as critical infrastructure of national and international importance, should strengthen its capabilities in the areas of security and operational resilience. Its role as a point of entry for NATO logistical support and a potential base for military operations makes it a strategic component of the national defence system. For this reason, there is a growing need to invest in dual-use infrastructure. It is particularly important to adapt quays, manoeuvring areas, terminals and technical facilities to the requirements of military mobility. Close cooperation with NATO in the areas of planning, exercises and joint projects is also recommended. Alongside physical investments, it is essential to strengthen the Port's cybersecurity, as logistics infrastructure is increasingly becoming a target for cyberattacks. This means that the protection of facilities, access control and the monitoring of port areas should go hand-in-hand with the security of traffic management, communication and operational data systems, which must be treated as a strategic priority. Also of key importance is the development of human-capital-building teams of experts in security, military logistics and crisis management, as well as investing in training, the transfer of know-how and the exchange of experiences with foreign partners.

4



Green transition

Against the backdrop of the trends described above relating to the energy transition, increasingly stringent environmental regulations and growing pressure to decarbonise the transport sector the Port of Gdańsk faces a strategic challenge: to transform itself into a modern, low-carbon energy hub. As a key point for Poland's supply of energy carriers, the Port plays a vital role in ensuring the country's energy security. Projects in line with these trends are already underway, such as the implementation of the OPS system and the planned FSRU-type LNG terminal. To fully exploit the potential of the Port of Gdańsk as an energy hub, further investment in low-carbon infrastructure is recommended, including terminals for handling alternative fuels, energy storage facilities, renewable energy installations and energy management systems. International cooperation with technological, energy and logistics partners will also be important, as it will enable the transfer of know-how, the implementation of innovative solutions and integration with energy networks. The implementation of these projects will largely depend on the stability of the regulatory environment, including EU climate policy, and on the availability of financing mechanisms.



Development of access infrastructure

5

In order to further strengthen the position of the Port of Gdańsk, a comprehensive approach to the development of land-based infrastructure is essential. The Port's efficiency depends not only on its handling capacity, but also on the quality, throughput and integration of the road and rail networks that connect it to the national and regional logistics infrastructure. Investments such as the construction of a second bridge to Port Island and the development of the Northern Central Railway Line are crucial for increasing the Port's accessibility, reducing delivery times and improving competitiveness relative to other European terminals. Equally important is the expansion of the entire transport corridor to ensure the smooth flow of traffic further inland. Building the bridge itself is an important step, but it must be accompanied by coordinated investment planning within the wider logistics network, so that transport flows smoothly and without bottlenecks further along the route. To effectively improve the efficiency of the transport system serving the Port, close cooperation with regional and national authorities is also necessary in the areas of spatial planning, investment coordination and ensuring infrastructural coherence.



Automation and digitisation of port operations

6

In the face of growing competition from Western European ports and the dynamic development of technology, the Port of Gdańsk should treat automation and digitisation as strategic areas of development. The automation of cargo handling processes, traffic management and internal logistics, supported by solutions based on artificial intelligence, machine learning and predictive systems, can significantly increase operational efficiency, safety and the resilience of infrastructure to disruptions. It is recommended that modern technologies be implemented not only in terminal operations but also in monitoring and surveillance systems for technical infrastructure. Developing human capital and digital skills among the Port's staff is also of key importance. In this regard, it is recommended to strengthen cooperation with technical universities, research institutes and start-ups, and to support R&D (research and development), which will enable knowledge transfer, the testing of innovative solutions and the building of an expert base in the field of state-of-the-art port technologies.



Tightening cooperation with stakeholders

7

The findings of the analysis presented in this report highlight the large number and diversity of entities linked to the Port of Gdańsk. These include both commercial entities, such as customs agencies, companies from the TFL sector, and shipowners, as well as institutions within the Port's wider environment, including the Maritime Authority and the Border Sanitary and Epidemiological Control Point in Gdańsk.

The Port of Gdańsk ecosystem is highly complex, and its efficient operation requires the integration and cooperation of many entities. The role of the Port of Gdańsk Authority, as the company responsible for managing the Port, is to strengthen relations within these stakeholders and to build a platform for dialogue and cooperation. To this end, it is recommended that comprehensive communication and coordination measures be implemented to enable the strengthening of relations within the port ecosystem. Such initiatives should involve entities, such as the Pomorskie Development Agency, the Gdańsk Economic Development Agency, the Gdańsk International Fair, employers' organisations and the voivodeship government. These institutions possess not only expert knowledge and experience in implementing development projects, but also extensive networks of business and international contacts. It is worthwhile to undertake joint actions aimed at promoting the Port, public education and the economic development of the region. Such partnerships can significantly strengthen the position of the Port of Gdańsk as a strategic transport hub and a centre for cross-sectoral cooperation.

8



Promoting the Port and its importance for the region's development

According to the analyses conducted, the Port of Gdańsk's operations generate significant benefits for the region by creating jobs, providing a stable income for households and contributing to the growth of local businesses. The operations of entities linked to the Port contribute to creating added value in the economy and to the growth of public revenue at local, regional and national levels. Despite the Port's significant impact on the development of Pomorskie and the whole of Poland, awareness of its importance remains low. Information, promotional and educational initiatives are needed to raise awareness among the region's residents and other stakeholders regarding the Port's role in economic and social life, as well as to strengthen the Port's brand as a dynamic centre of regional development. A better understanding of the Port's role could translate into greater support for its initiatives and investments.



Summary

Today, the Port of Gdańsk stands out as one of the key hubs on Poland's economic map – not only because of the scale of its cargo handling operations, but above all due to the wide-ranging impact it has on the local socio-economic environment.

Its operations contribute to the growth of local businesses, increased employment and investment, and the stabilisation of public finances. The Port not only responds to the needs of modern trade, but also shapes new directions for development from the digitisation and automation of processes, through the green transition, to building the country's resilience to energy and geopolitical crises.

Faced with global challenges, the Port of Gdańsk is not standing idly by; it is actively investing, modernising its infrastructure and developing its capabilities to become a paragon of modern and sustainable development. Its role as a logistics, energy and strategic hub will only grow in the coming years, and the effects of its operations will be felt ever more strongly at local, regional and national levels. By supporting the development of the Port of Gdańsk, we are contributing not only to strengthening the foundations of the Polish economy and raising the standard of living of its residents, but also to building Poland's position as a competitive player on the international stage both economically and geostrategically.

For the Port of Gdańsk to continue to develop and contribute to the local, regional and national economy, coordinated cooperation is essential with authorities at all levels local, regional and central as well as with other key stakeholders involved in its operations. Only through joint efforts, coherent actions and a long-term strategy will it be possible to maintain the pace of development, increase operational efficiency and fully leverage the Port's potential.

Annex 1.

Note on methodology

Methodology for estimating the impact of the Port of Gdańsk's operations on the local, regional and national economy (Leontief model).

1 Purpose and scope of the analysis

The study aims to estimate the total economic impact of the activities of the Port of Gdańsk and its linked enterprises on: (I) the city of Gdańsk, (II) the Tri-City, (III) the Pomorskie Voivodeship, and (IV) the Polish economy as a whole for the period 2015–2024. The measures used to assess this impact are output, the number of people in employment, household income and public finance revenues generated as a result of the activities of enterprises linked to the operation of the Port or enabling its operation, taking into account inter-sectoral linkages within the Polish economy. The total effects have been disaggregated into direct, indirect and induced effects.

2 Theoretical framework: Leontief's demand model

The analysis employed the Leontief inter-industry flow model. In this model, a demand impulse (the final demand vector) contributes to output generation across economic sectors as described by the inverse Leontief matrix $L = (I - A)^{-1}$, where A is the matrix of technical (domestic) coefficients. Value added, employment and other aggregates are obtained by multiplying the production vector by the relevant sectoral coefficients.

The following effects were identified among the model's results:

- **Direct effect** – the result of primary expenditure by ZMPG S.A. and other businesses linked to the operations of the Port of Gdańsk.

- **Indirect effect** – the result of increased purchases from suppliers in the inter-industry linkages chain.
- **Induced effect** – the result of additional household consumption financed by wages linked to direct and indirect effects.
- **Total effect** – the combined effect being the sum of direct, indirect and induced effects.

Interpretation note: the magnitude of tax effects presented in the direct effect should not be equated solely with the amount of taxes actually paid by a given entity or group of entities. The direct effect takes into account taxes paid by entities receiving the initial flow of expenditure (e.g. suppliers in direct-stage production) and tax and social insurance contributions related to wages.

3 Analysed entities and analysis levels

The economic effects outlined above have been estimated for the following groups of entities:

- **Level 0** – Port of Gdańsk Authority (ZMPG S.A.);
- **Level 1** – port operators within the Port;
- **Level 2** – TFL sector (transport, freight forwarding and logistics), which encompasses road and rail transport, freight forwarding companies and operators of logistics centres handling goods reloaded in the Port of Gdańsk Area;
- **Level 3** – indirect activity – Poland-wide effect;
- **Level 4** – households supported by employment in entities at levels 0–3.

4 Source data and time horizon

- **Sample:** 146 businesses linked to the Port (both within the Port of Gdańsk and outside Gdańsk), 2015–2024. The analysis utilised financial data for these businesses from the Dun & Bradstreet database, which was subsequently verified for consistency and completeness, taking into account financial data from the EMIS database as well. Where financial data for selected companies in specific years was not available, data imputation was applied using a satellite, expert estimate of changes in the economic activity of businesses in the sector under analysis and changes in the volume of cargo handled at the Port of Gdańsk. The financial database compiled on the basis of the combined Dun & Bradstreet and EMIS databases for the years 2022-2023 covered 128 businesses out of 146 entities identified as being directly linked to the operations of the Port of Gdańsk (88% coverage). Due to delays in the collection of financial data in the source databases, this coverage rate was only 65% for 2024. The missing financial information was supplemented on the basis of average changes in financial results within the group of selected businesses for which relevant data was available, taking into account sectoral breakdown, and on the basis of aggregated changes in the economic activity of the Port of Gdańsk measured by the volume of cargo handled in individual years.
- **Financial results of businesses**, whose economic activities are linked to the operations of the Port of Gdańsk. The main source of financial data was information retrieved from the Dun & Bradstreet database for the years 2015-2024. Where the most recent financial data for the selected businesses was not available, the data was supplemented where available using the EMIS database. The scope of financial data included in the analysis covers the following expenses: consumption of materials and energy, cost of third-party services, taxes and charges, gross payroll costs, social insurance and health insurance contributions, other costs by type, other operating expenses, financial expenses, income tax, net profit, amortisation and depreciation. For each business, its economic activity profile was determined on the basis of the primary PKD code and location. The proportion of each enterprise's

activities related to the operations of the Port of Gdańsk was determined by an expert based on their location and analysis of their economic activity profile.

- **Inter-industry flow balance** for Poland at current basic prices in 2020, covering 77 economic sectors (GUS, publication of 27 June 2024). These data show the flow of goods within the Polish economy, broken down into domestic production and imports, and illustrate the use of these resources, broken down into intermediate consumption, consumption by households, central and local government, and non-profit institutions, gross capital expenditure on fixed assets, changes in inventories, and exports. The data present the national economy by homogeneous groups of goods and services, as well as the interrelationships involved in the creation and distribution of gross domestic product. As the inter-industry flow balance is published by GUS every 5 years, the latest available matrices from 2020 have been updated to 2024 price levels, taking into account changes in the value of GDP and its components at current prices between 2020 and 2024.
- **Information on the volume and structure of production and the number of people in employment at the regional level** (the city of Gdańsk, the Pomorskie Voivodeship) were sourced from the ARDECO database (the European Commission's Annual Regional Database).
- **Data on the volume and structure of cargo handled and capital expenditure at the Port of Gdańsk** for the years 2015-2024 were provided by ZMPG S.A.

5 Demand impulse streams included in the analysis

The model distinguishes four parallel flows, calculated separately and subsequently summed:

- **Direct operating expenses** (consumption of materials and energy, third-party services, other cost categories): converted into a demand flow consistent with the aggregated expense structure of businesses engaged in transport and storage.
- **Employee remuneration** (gross labour costs): converted into households' consumer demand

in line with the structure of household spending in Poland.

- **Profit/owners' result** (the portion reinvested in Poland): converted into investment demand in line with the structure of capital expenditure by businesses engaged in transport and storage
- **Taxes paid in Poland** (corporate income tax, personal income tax, social insurance contributions, VAT, local taxes and charges): converted into public finance sector demand with a structure consistent with the sector's spending.

6 Regionalisation of economic effects

In order to estimate the regional (local) economic effects of the Port of Gdańsk's operations, it was assumed that:

- direct effects are concentrated in Gdańsk (for ZMPG S.A. and quay side operators);
- indirect and induced effects materialise in Gdańsk, the Pomorskie Voivodeship and the rest of the country;
- the scale of the impact decreases with increasing distance from the Port.

At the same time, for businesses whose port-related activities account for only a part of their overall operations (e.g. large railway, logistics and transport companies), the Port's share (expert fraction) was applied, proportionally reducing all demand flows attributed to the Port.

Regional estimates (e.g. effects for the city of Gdańsk and the Pomorskie Voivodeship) carry greater uncertainty than calculations for Poland as a whole. This is due to several reasons:

- Inter-sectoral input-output matrices are published for Poland as a whole. The breakdown of results into regional levels requires the prior application of expert allocation methods utilising, amongst other things, available regional data on gross value added, the number of people in employment, and distances between regions. Consequently, the smaller the administrative unit covered by the analysis, the greater the risk of error in the estimate presented.
- No data is available on the regionalisation of the supply chain and jobs; some purchases of goods and services are made outside

the region, and the full flow routes are not observable in the statistical data.

- The accuracy of the estimates of the regional effects on tax revenue carries uncertainty due to discrepancies between the place of work and the place of residence, the place of business and an enterprise's registered office, and, as a result, the place where taxes are paid. Despite the detailed consideration of the registered offices of the businesses included in the analysis, the regionalisation of tax effects carries uncertainty.
- The proportion of individual businesses, activities related to the Port's operations has been estimated by an expert and may differ from the actual figure, which has a greater impact at the regional level than in the case of national-level effects.
- The procedure for supplementing missing financial data and the need to update the input-output matrices to the 2024 price levels introduces additional uncertainty regarding the magnitude of regional economic effects.
- Given the above limitations and, consequently, the need to make numerous modelling assumptions, the regional results presented should be treated as order-of-magnitude estimates, and certainly with greater caution than in the case of aggregates for Poland.

7 Main limitations of the model

The Leontief model is a demand-side model, describing the impact of a demand impulse under conditions of constant prices and technology. It does not take into account the supply response to changes in the volume and structure of individual components of the final demand in the economy, changes in relative prices, technological substitution or production capacity constraints.

Absence of supply side effects and general equilibrium: the Leontief model does not capture effects related to competition for resources (e.g. labour, capital), possible shifts in economic activity from other sectors, or general equilibrium effects.

Stability of sectoral structures: in the absence of sufficiently detailed statistical data, the model assumes that the inter-industry relationships observed at the national level also accurately reflect inter-

sectoral relationships at the regional and local levels. In particular, it was assumed that the intersectoral structure of intermediate consumption, household consumption, business investment and public expenditure presented in the latest available input-output matrices from 2020 could be applied to the analysis and assessment of economic effects in subsequent years as well. It was assumed that structural changes in the economy are minor and do not significantly affect the results.

Investment demand: it was assumed that the financial results generated by businesses which are linked to the Port's operations or enable its functioning are entirely converted into investment demand in Poland. In reality, part of the profit may be transferred abroad (dividends to foreign owners) or consumed in ways other than investment.

Financial data on businesses and their significance for the Port's operations: in the absence of sufficiently detailed data, the shares attributed to port operations in the case of businesses that are not directly or exclusively linked to the Port's operations have been estimated by an expert, which may account for the imperfections in the presented estimate. It was also assumed that the financial data of the companies identified as representing entities linked to the Port's operations was complete and accurate. It was assumed that the scale of economic activity of entities linked to the Port's operations but not directly included in the analysis has an insignificant impact on the scale of the estimates presented.

Absence of dynamic and long-term effects: the model does not account for the impact of port investments on productivity and competitiveness in the longer term, nor for the effects of endogenous growth.

Annex 2.

Tables on exports and imports at the Port of Gdańsk

Exports and imports at the Port of Gdańsk, 2020–2024, tonnes

	2020	2021	2022	2023	2024
Export volume (million tonnes)	7.28	9.24	7.42	9.40	9.90
Share of Polish exports (%)	6.2%	7.3%	6.0%	7.5%	8.1%
	2020	2021	2022	2023	2024
Import value (million tonnes)	32.15	36.22	53.01	61.05	57.35
Share of Polish imports (%)	20.2%	21.9%	30.8%	36.7%	35.9%

Exports and imports at the Port of Gdańsk, 2020–2024, millions of PLN

	2020	2021	2022	2023	2024
Export value (PLN million)	22 444.4	35 845.5	37 611.0	43 632.8	43 328.9
Share of Polish exports (%)	2.1%	2.7%	2.3%	2.7%	2.8%
	2020	2021	2022	2023	2024
Import value (PLN million)	88 346.7	145 265.5	233 024.1	220 507.4	200 536.3
Share of Polish imports (%)	8.7%	11%	13.6%	14.1%	13.2%



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