



Market Review 2025

CruiseBaltic

Introduction

Cruise Baltic is a network consisting of 31 cruise ports and destinations in 9 different countries in the Baltic Sea region.

Aalborg and Malmö left the network by the end of 2024, and in 2025 Härnösand became a member. One additional port, Kiel, has been included in the analysis to achieve a better view of the entire region as it is one of the largest cruise ports in the area and plays a significant role on the regional market.

The purpose of the report is to present an updated view of the developments in the cruise sector in the Baltic Sea region, including data on guests, calls, and turnarounds.

The information presented in the report is based on data collection among ports in the Baltic Sea region as of December 2024. Due to lack of data, Aalborg is not included in the report.

The report presents the actual developments until 2024 and the expected numbers for 2025. Härnösand is reflected solely in all expectations for 2025, and not in the data for 2024.



*Members of Cruise Baltic in 2024/2025

*Ports that are not part of the network in 2024/2025

Summary

In 2024, there has been a slight decrease in cruise guests, calls, and turnarounds in the Baltic Sea region. Despite the drop, there was a significant increase in off-season calls, particularly in the first quarter of 2024, which indicates a potential shift towards year-round cruising.

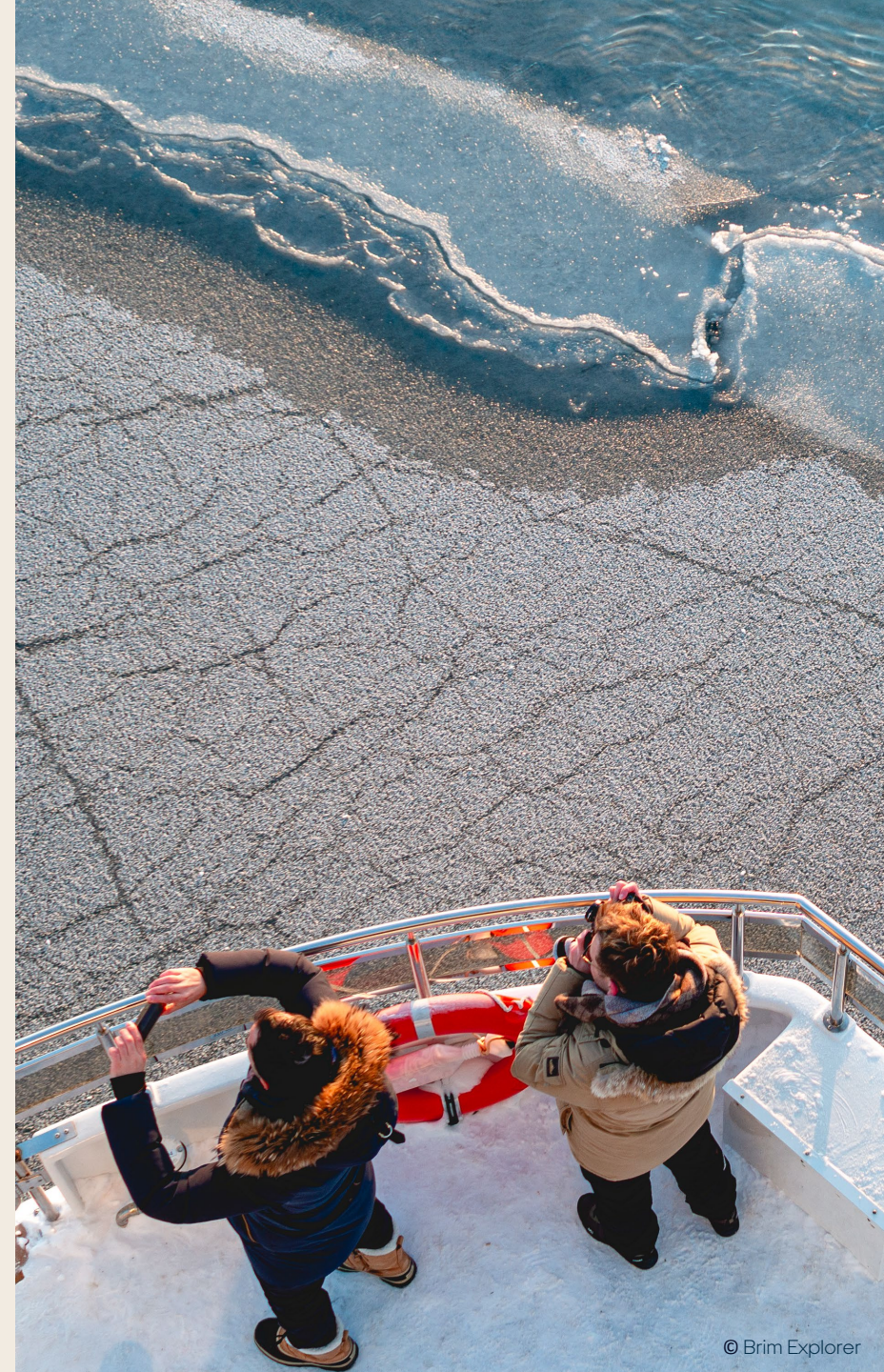
In 2024 (compared to 2023)

- The total number of cruise guests has decreased by -2.8%
- The total number of calls has decreased by -2.8%
- The total number of turnarounds has decreased by -1.6%

Expectations for 2025 are quite optimistic for the Northern European cruise ports.

In 2025 (compared to 2024)

- The total number of cruise guests is expected to increase by 8.5%
- The total number of calls is expected to increase by 10.1%
- The total number of turnarounds is expected to increase by 2.1%

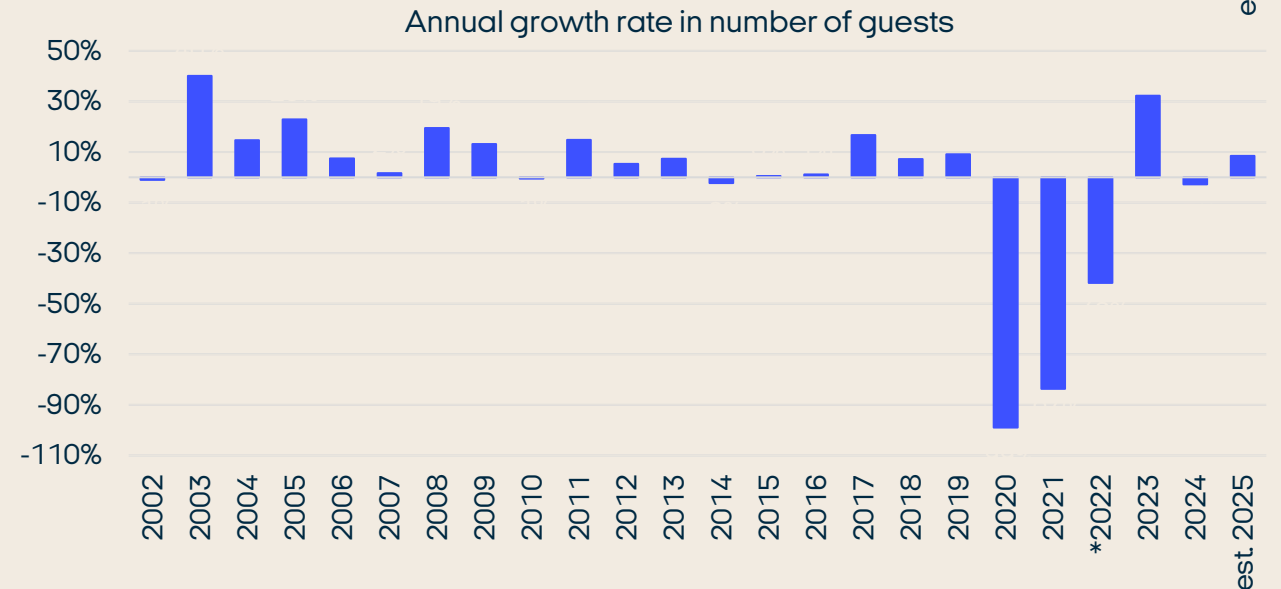
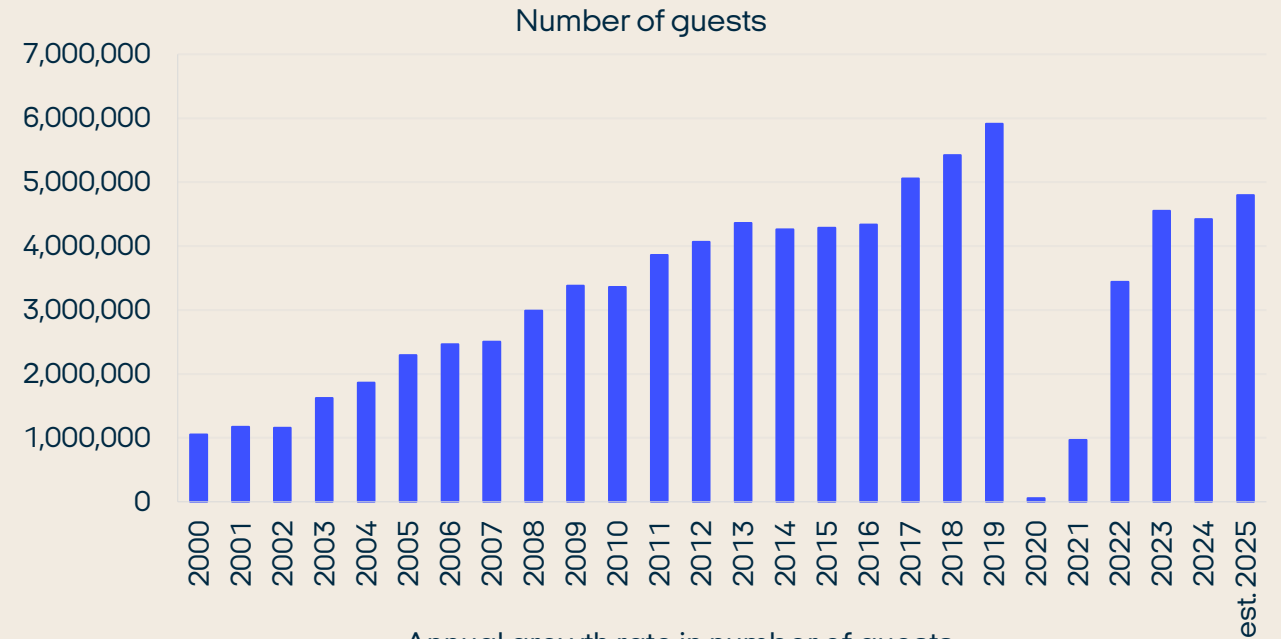


Cruise Guests

The number of cruise guests visiting the Baltic ports in 2024 decreased by -2.8% compared to 2023.

The number of guests is expected to increase by 8.5% in 2025 compared to 2024, to a total of 4,798,357 guests.

From 2018-2024 the number of guests has decreased by an average annual rate of -3.3% per year [from 5,420,927 in 2018 to 4,423,473 in 2024].



Note: Due to a correction of a partner's number of pax for 2022, the data shown slightly vary from the 2023 Market Review

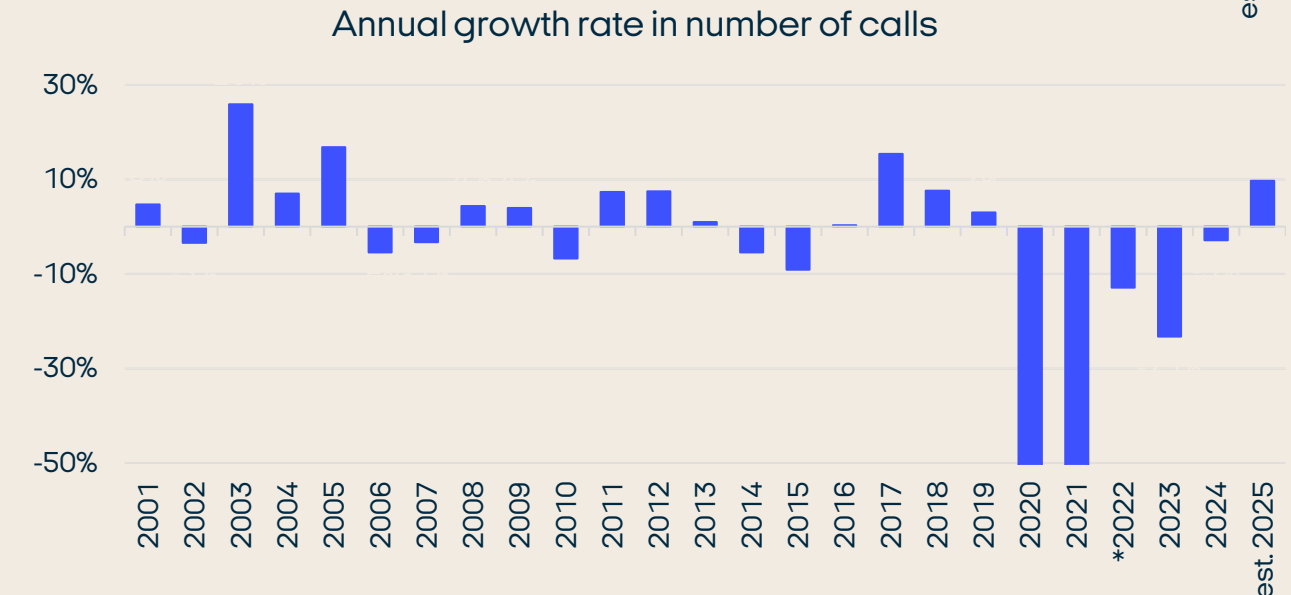
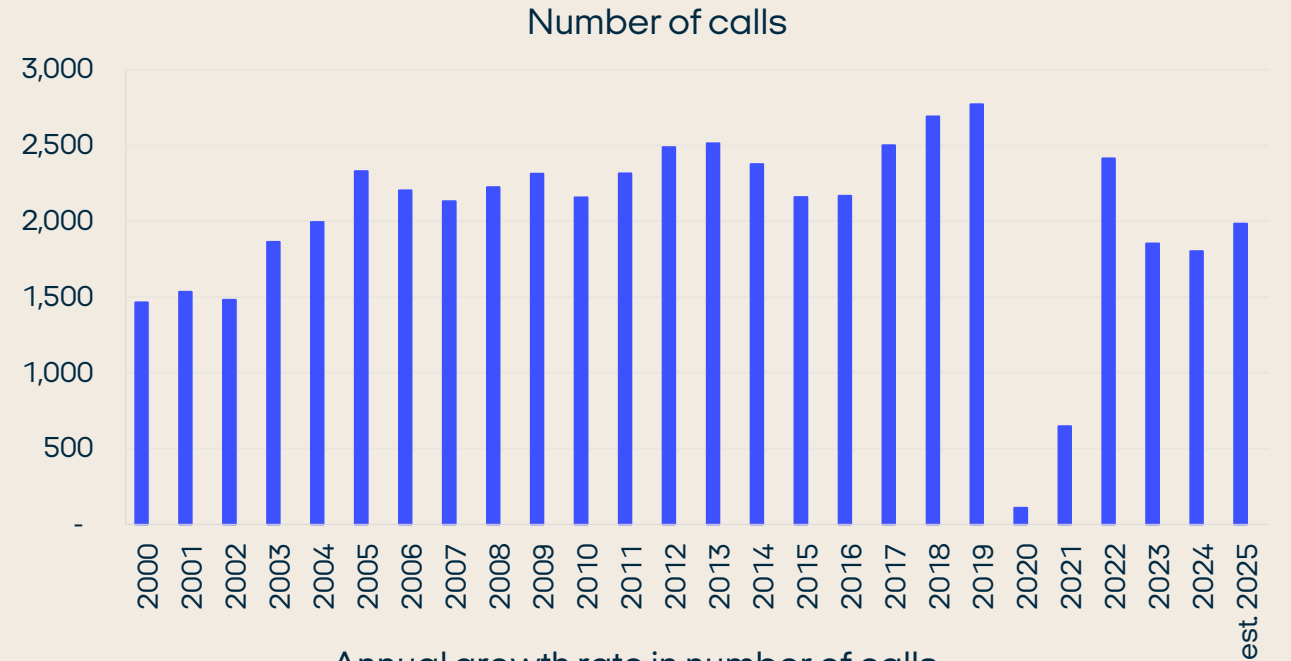
*To show a more accurate development of the growth rate, 2020 and 2021 have been excluded from the calculation due to the effect of the pandemic. The growth rate for 2022 is, therefore, related to 2019. From 2023 and onwards, this no longer applies.

Calls

The number of calls in 2024 decreased compared to 2023 and resulted in 1,802 calls, which is a decrease of -2.8%.

The Baltic ports anticipate an increase of 10.1% in the total number of calls and expect 1,984 calls in 2025.

From 2018-2024 the number of calls has decreased by an average annual rate of -6.5% per year (from 2,692 in 2018 to 1,802 in 2024).



*To show a more accurate development of the growth rate, 2020 and 2021 have been excluded from the calculation due to the effect of the pandemic. The growth rate for 2022 is, therefore, related to 2019. From 2023 and onwards, this no longer applies.

Calls – *continued*

The map on the right provides an overview of the Baltic ports in 2024 and the number of cruise calls they each welcomed.

In total, 29 ports – including Kiel, welcomed cruise calls in 2024.

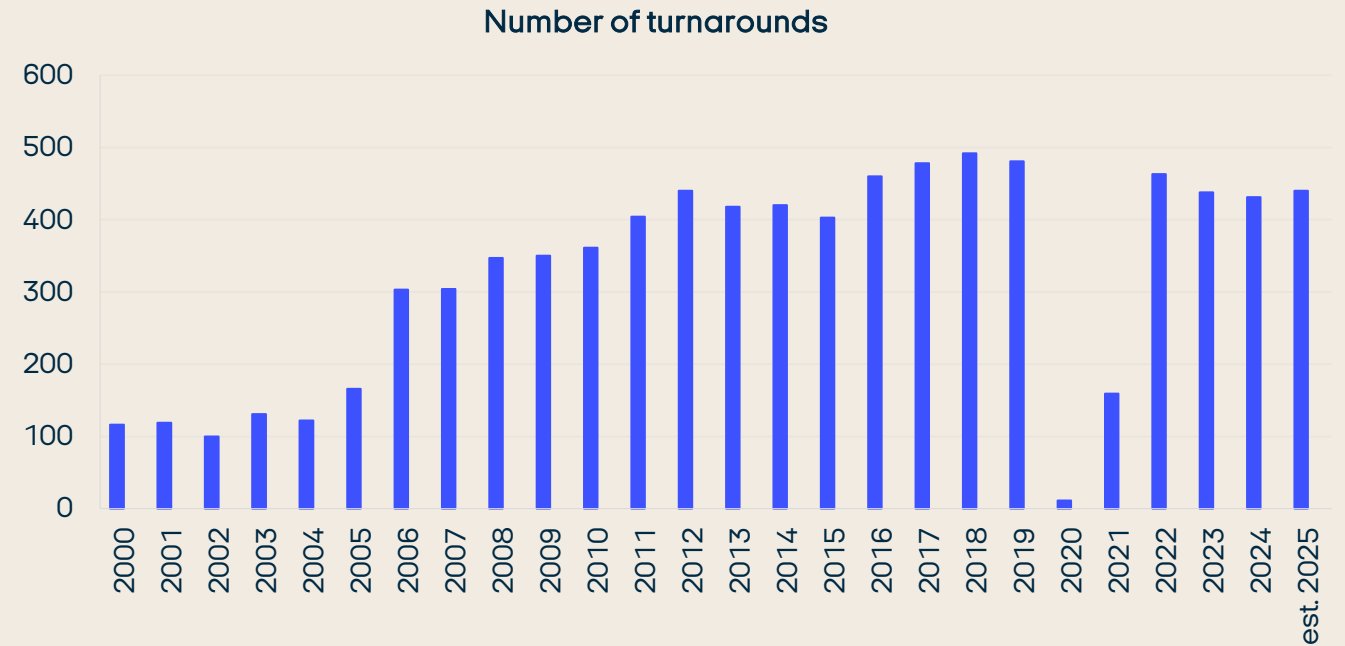


Turnarounds

The number of turnarounds decreased from 2023 to 2024, from 438 to 431.

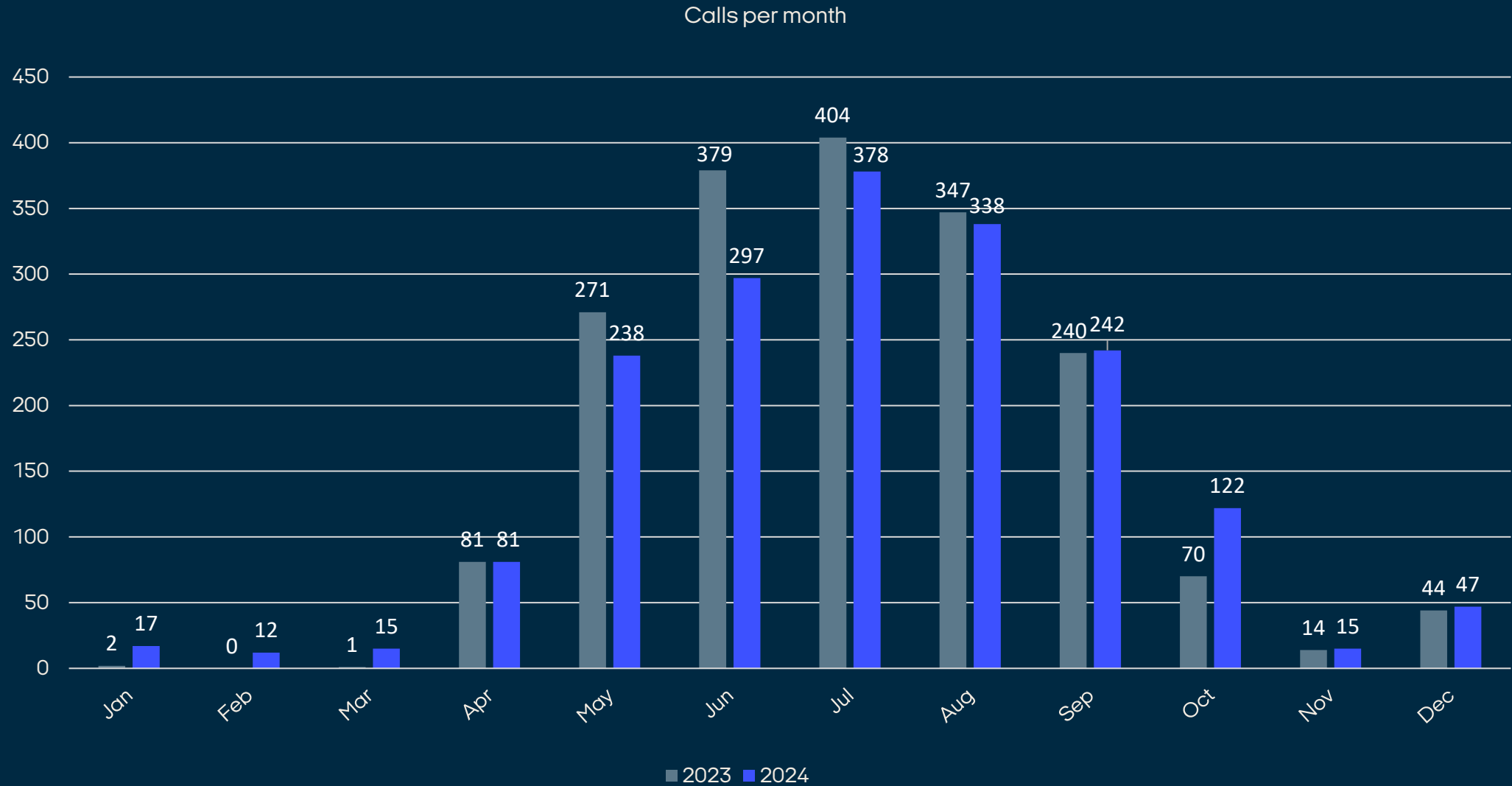
In 2025, the Baltic ports anticipate an increase of 2.1%, from 431 turnarounds to an estimated number of 440.

From 2018-2024 the number of turnarounds decreased by an average annual rate of -2.2% per year [from 492 in 2018 to 431 in 2024].



*To show a more accurate development of the growth rate, 2020 and 2021 have been excluded from the calculation due to the effect of the pandemic. The growth rate for 2022 is, therefore, related to 2019. From 2023 and onwards, this no longer applies.

Number of calls per month in 2024



Number of calls per month in 2024 - *continued*

The purpose of monitoring the number of calls per month is to identify possible new trends in the Baltic ports.

As in 2023, July was the busiest cruise month in 2024 [378 calls] followed by August [338 calls] and June [297 calls]. May and September were also busy, with 480 cruise calls in total.

The most remarkable change in number of calls per month from 2023 to 2024 is the increase in calls in the off-season months especially in Q1 [Jan, Feb, Mar]. In Q1 2024 the Baltic ports welcomed a total of 44 cruise calls compared to a total of 3 in 2023 equivalent to an increase of 1366.7%.

October has also grown in popularity as the number of calls has increased from 70 in 2023 to 122 in 2024.

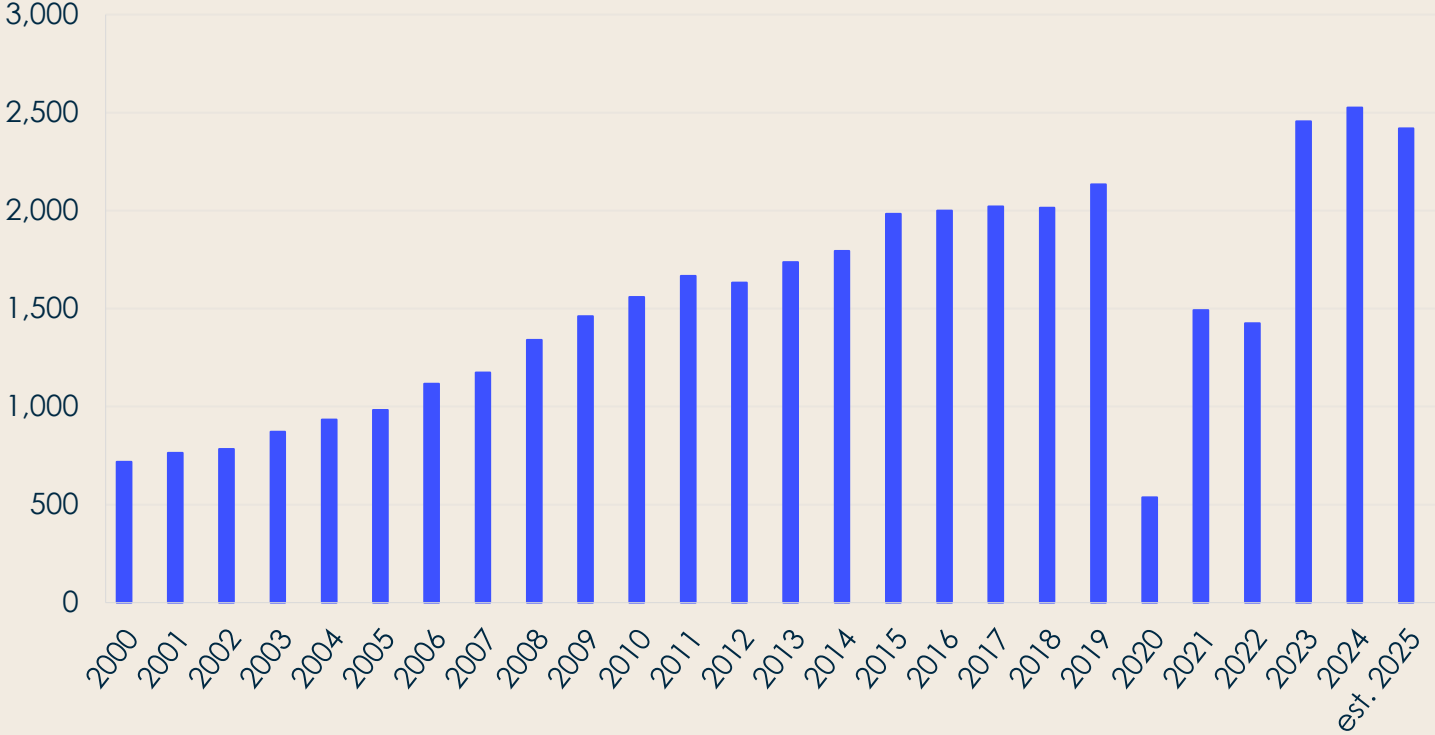
The so-called 'Christmas Calls' during December reached a total of 47 calls in 2024, which is 3 more than in 2023.

Number of guests per call

The average number of cruise guests is expected to decrease in 2025 compared to 2024. In 2024, the average number of guests per call was 2,455 and is expected to decrease to 2,419 in 2025.

From 2013 to 2024, the average number of cruise guests per call has increased from 1,734 to 2,455. An increase of cruise guests per call, equivalent to 41.6%.

The growth from 2013 to 2024 is presumably a result of the larger vessels that have been deployed in the region over the last eleven years.



Number of overnights in 2024

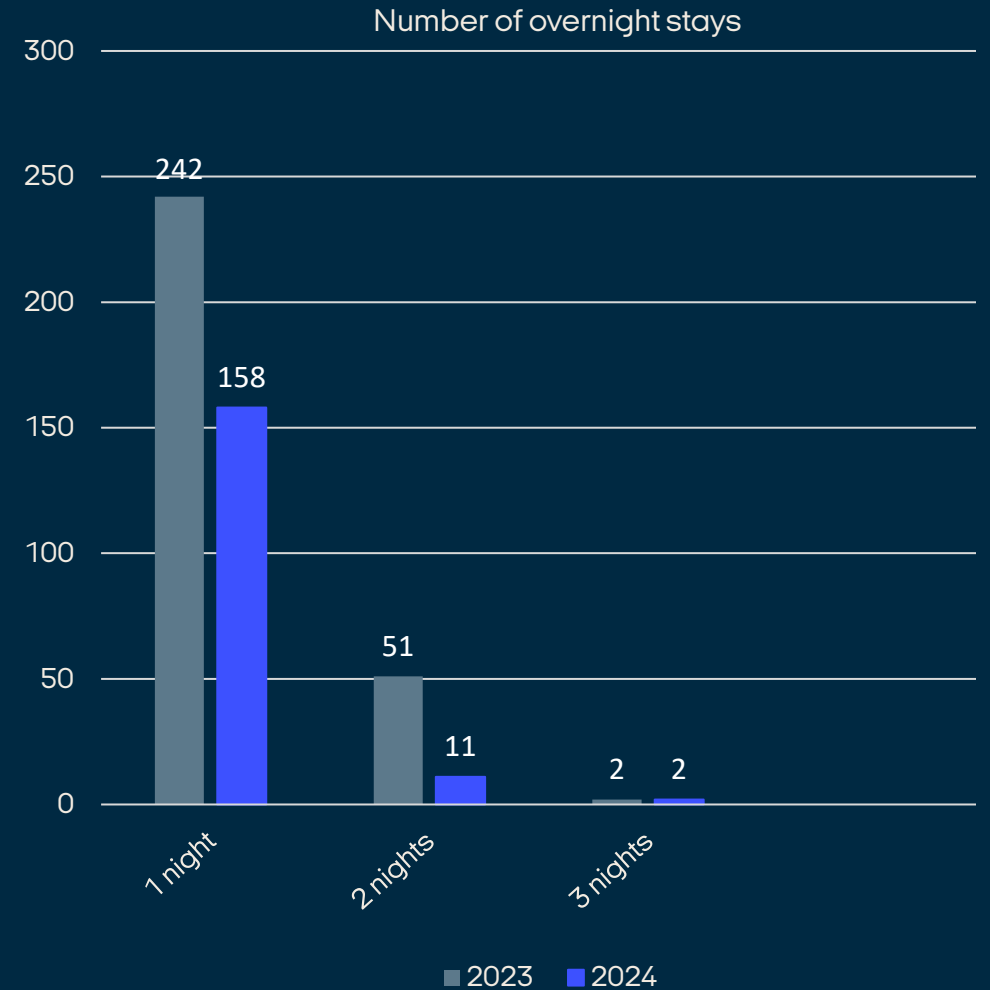
Since 2017, the number of overnight stays in the Baltic Sea has been monitored.

The purpose of monitoring the number of overnights is to identify possible new trends in overnight stays in the Baltic ports.

The 1-night stays far exceed the 2-night stays as it has done since 2018.

The total number of overnight stays in the region in 2024 was 171. In 2023, the number was 295, which is a decrease of -42.03%.

In 2024, 13 destinations welcomed calls with one overnight stay, and 5 destinations welcomed calls with two or more overnight stays. In 2023, 15 destinations welcomed calls with one overnight stay, and 7 destinations welcomed calls with two or more overnight stays.



Cruise Baltic Segments

Small [0-24 calls]	Hamina [0], Kalundborg [0], Sassnitz [1], Helsingor [2], Ystad [2], Helsingborg [3], Malmö [3], Kalmar [4], Fredericia [4], Lysekil [5], Nyborg [5], Kotka [6], Saaremaa [7], Turku [7], Arendal [17], Mariehamn [18], Karlskrona [18]
Medium [25-49 calls]	-
Large [50-199 calls]	Skagen [50], Klaipeda [53], Roenne [55], Gothenburg [57], Aarhus [60], Gdansk [60], Riga [66], Helsinki [97], Tallinn [100], Visby [102], Stockholm [119], Kristiansand [129], Oslo [142], Rostock [147], Kiel [184]
X-Large [200+ calls]	Copenhagen [280]

The above is based on 2024 calls.

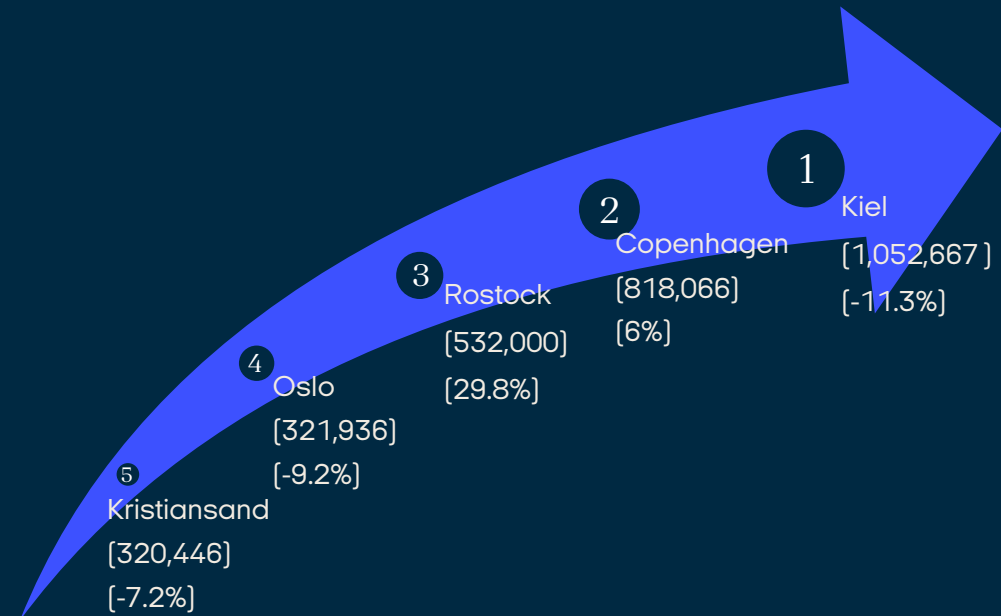
Since 2023 Klaipeda, Gdansk and Roenne moved from Medium to Large whereas Kiel moved from X-Large to Large.

Top 5: Amount of guests in 2024

Despite that Kiel has seen a decrease on -11.3% in cruise guests from 2023 to 2024, they are still the largest port in terms of this.

Rostock had the highest growth rate. Growing from 410,000 guests in 2023 to 532,000 in 2024 which is equivalent to an increase of 29.8%.

Since 2023, there has been no change in the Top-5, which matches the expectations from last year. Expectations for the Top-5 in 2025 also show no change in the listing.



Top 5: Calls in 2024

In 2024, the number of calls decreased in the Top-5 ports except for Rostock and Kristiansand. Rostock increased by 13.1% calls and Kristiansand stayed unchanged compared to 2023.

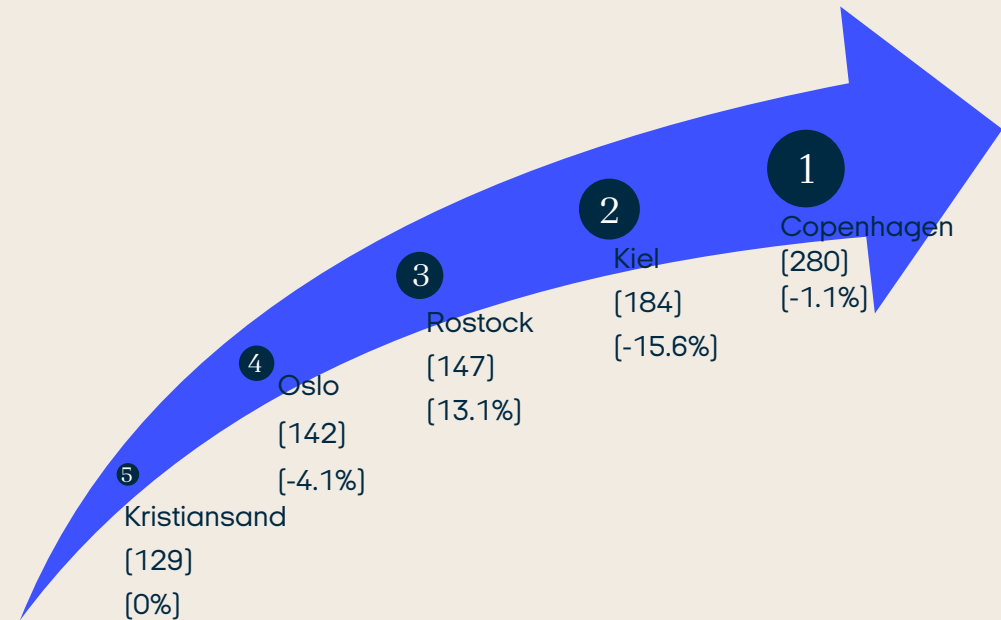
The increase of calls in Rostock in 2024 results in the port moving from 4th to 3rd place in the Top-5, whereas the listing looked like this in 2023:

1) Copenhagen, 2) Kiel, 3) Oslo, 4) Rostock, and 5) Helsinki.

All the following ports expect an increase in calls in 2025:

Arendal, Copenhagen, Helsingor, Gothenburg, Hamina, Helsingborg, Kalundborg, Klaipeda, Kristiansand, Lysekil, Oslo, Riga, Rostock, Roenne, Skagen, Stockholm, Tallinn, Visby and Aarhus.

In 2025, Oslo is expected to take back the 3rd place in the Top-5 listing.



Top 5: Turnarounds in 2024

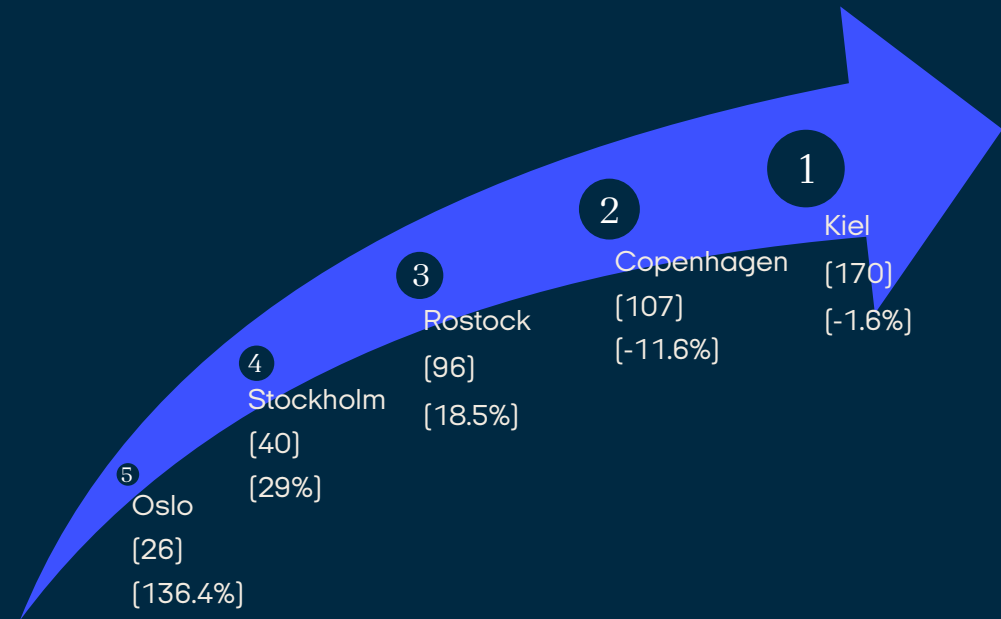
In the Top-5 listing, Oslo experienced the highest increase in turnarounds from 2023 to 2024, going from 11 to a total of 26. Stockholm and Rostock also increased.

The two destinations in top, Kiel and Copenhagen, decreased in the number of turnarounds compared to 2023.

Since 2019, Kiel has been the largest turnaround port in the Baltic Sea region and is expected to continue like that in 2025.

Since cruise lines removed St. Petersburg from their itineraries, Copenhagen lost many turnarounds from the US market. The German market has been increasing their German brand's turnarounds in the meantime, which explains that Kiel has been a larger turnaround port than Copenhagen since 2019.

Expectations for the Top-5 in 2025 show no change in the listing.



The X-Large Ports

[200+ Calls]

In 2024, the X-Large Ports consist solely of Copenhagen [280]. In 2023 both Copenhagen and Kiel were part of the segment.

The X-Large Port [Copenhagen] had 280 calls in 2024, which is a decrease of -1.1% since 2023. The segment is expected to increase in 2025.

Copenhagen had 106 turnaround calls in 2024 and expects 107 in 2025.

The Large Ports

[50-199 Calls]

The Large Ports consist of Skagen [50], Klaipeda [53], Roenne [55], Gothenburg [57], Aarhus [60], Gdansk [60], Riga [66], Helsinki [97], Tallinn [100], Visby [102], Stockholm [119], Kristiansand [129], Rostock [147], Oslo [142], and Kiel [184].

Since 2023, Kiel moved from the X-Large to the Large segment whereas Roenne, Klaipeda and Gdansk moved from the Medium to the Large segment, which means that no ports are in the Medium segment.

The Large ports had 1.421 calls in total in 2024, which is an increase of 30.7% since 2023. The segment is expected to stay status quo in 2025.

In 2024, Helsinki [5], Oslo [24], Stockholm [37], Rostock [95], and Kiel [164] had turnaround calls.

In 2025, all five ports are once again expected to receive turnaround calls: Helsinki [1], Oslo [26], Stockholm [40], Rostock [96], and Kiel [170].

The Small Ports

[0-24 Calls]

The small ports consist of Kalundborg [0], Hamina [0], Ystad [2], Helsingor [2], Helsingborg [3], Kalmar [4], Fredericia [4], Nyborg [5], Malmö [3], Lysekil [5], Kotka [6], Saaremaa [7], Turku [7], Arendal [17], Mariehamn [18], and Karlskrona [18].

The Small segment had 109 calls in 2024, which is a decrease of -14.2% from 2023. The segment is expected to be reduced with one port in total in 2025 as Härnösand has joined the network, whereas Aalborg and Malmö is no longer a part of it in 2025.

In 2024 no ports in the small segment had turnaround calls and status quo is expected in 2025.

In 2025, the number of calls in the Small segment is expected to decrease by -10.1% to 98.

Definitions and Terminology

What is a cruise?

A Cruise is a voyage of at least 60 hours by a seagoing vessel, mainly for pleasure. No cargo/rolling stock will be transported but only passengers with tickets that should include accommodation and all meals. The Cruise voyage must include at least two visiting ports apart from the starting and ending port.

This definition is based on Cruise Europe's definition.

Number of cruise guests

Counted according to Cruise Europe's definition, i.e. turnaround passengers count double and stopovers count single.

Terminology

A "call"

When a ship enters a port, it "calls". The number of calls in a port is, hence, the number of ships visiting that port.

"Turnaround"

A call is called a turnaround if the passengers leave the ship at the port and new passengers board the ship. Turnarounds also include part-turnarounds. A call is defined as a part-turnaround if at least 25 % but not all of the passengers leave the ship and new passengers board.

"Cruise guest"

A cruise guest is a person buying a cruise trip. A cruise includes visits to several cities/ports; each time, the guest is counted as a passenger in that city/port [one passenger visit]. If the cruise guest stays on the ship for 7 nights and visits 5 cities/ports, he or she is counted as 1 guest, but as a passenger 5 times with 7 bed-days [on board the ship].

"Overnight stay"

An overnight stay is when a cruise ship spends the night in port. This allows for the cruise guest to spend more time exploring the city they are visiting.

CruiseBaltic



Cruise Baltic

Nørregade 7B

DK-1165 Copenhagen K

Phone +45 40 70 83 65 [Klaus Bondam, Director, Cruise Baltic]

cruisebaltic@woco.dk