

Market Review

For the Baltic Sea Region

2026

CruiseBaltic 

Introduction

Cruise Baltic is a network of 31 cruise ports and destinations across nine countries in the Baltic Sea region. For the purpose of this market review, two additional ports have been included in the analysis. Kiel is included to provide a more comprehensive picture of the regional cruise market, as it is one of the largest cruise ports in the area and plays a significant role in the region. Malmö is included as it is part of Copenhagen Malmö Port, who are partners in the Cruise Baltic network.

The purpose of this report is to present an updated overview of developments in the cruise sector in the Baltic Sea region, including data on passenger volumes, port calls, and turnarounds.

The report is based on data collected from cruise ports in the Baltic Sea region during November and December 2025. It presents actual developments up to and including 2025, as well as expected figures for 2026.



Summary

In 2025, cruise activity in the Baltic Sea region increased in terms of guests, port calls, and turnarounds. Growth was widely spread across ports and especially calls in Q4 rose sharply.

2025 compared to 2024

- The total number of cruise guests increased by **12.3%**
- The total number of port calls increased by **12.8%**
- The total number of turnarounds increased by **5.6%**

The positive development reflects a stronger-than-anticipated recovery and growing demand for the Baltic Sea region as a cruise destination. Growth in 2025 surpassed the original forecasts, which anticipated increases of 8.3% in guests, 10.1% in port calls, and 2.1% in turnarounds.

Looking ahead, expectations for 2026 remain optimistic.

2026 compared to 2025 - *forecast*

- The total number of cruise guests is expected to increase by **9.2%**
- The total number of port calls is expected to increase by **10.7%**
- The total number of turnarounds is expected to increase by **7%**

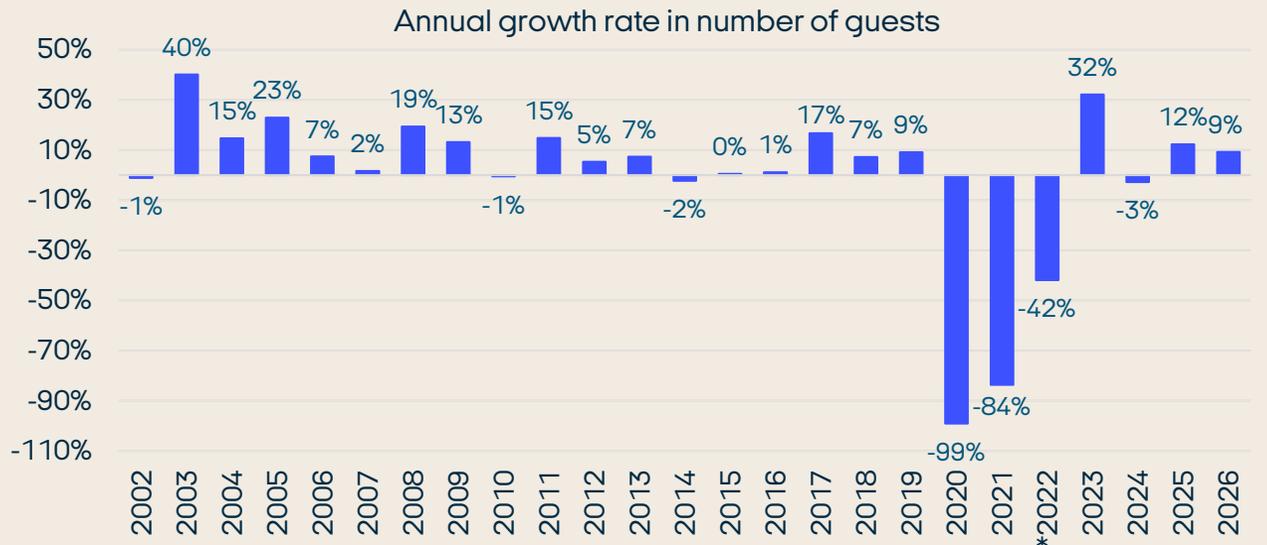
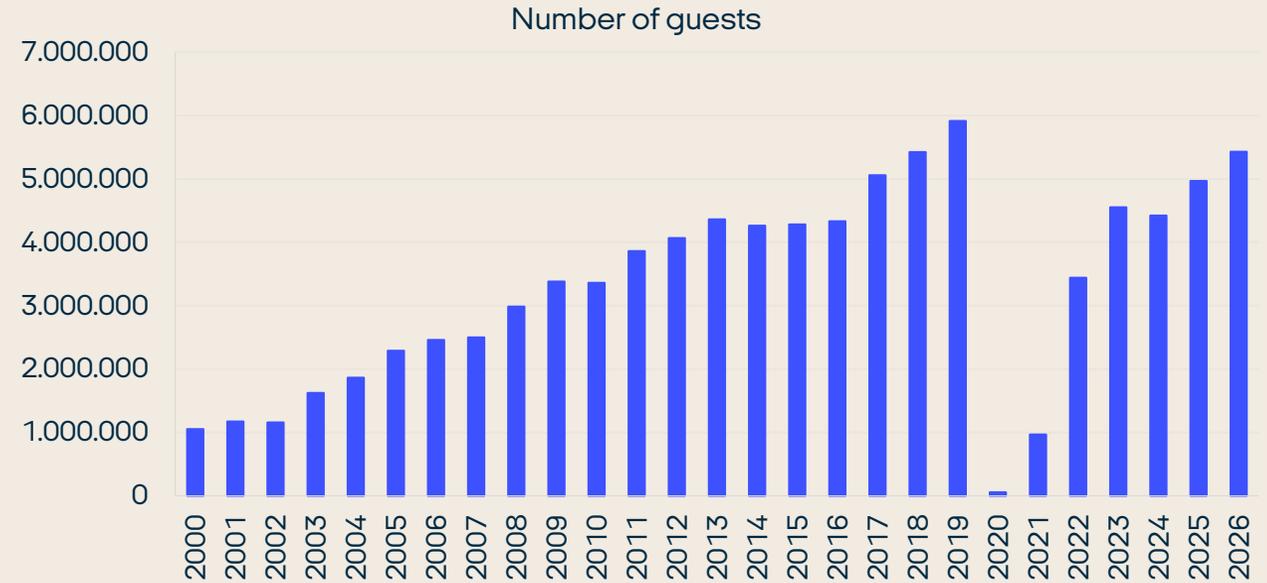


Cruise Guests

In 2025, the cruise guest numbers increased by 12.3% to 4,969,694 with a further 9.2% rise expected in 2026 to 5,427,361.

Over the longer term, the region has experienced solid growth, averaging 6.4% annually since 2000, when just over 1 million guests visited the ports. However, volumes remain slightly below pre-covid levels, down 1.2% compared to 2019.

Following the invasion of Ukraine in 2022, the 2023 season marked a structural rebound as Baltic itineraries were re-established in the Baltic without St. Petersburg. After a small dip in 2024 due to cautious deployment, **2025 and predictions for 2026 shows a return to more stable growth.**



*To show a more accurate development of the growth rate, 2020 and 2021 have been excluded from the calculation above 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

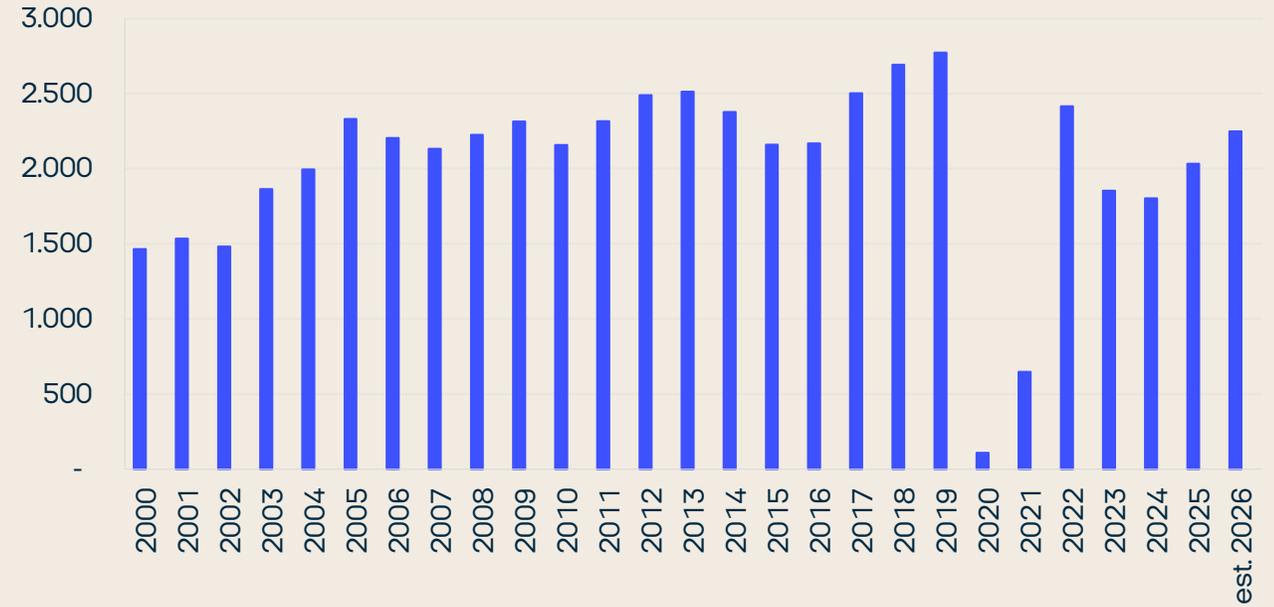
In 2025, the total number of cruise calls increased by 12.8% compared to 2024, reaching 2,049 calls. Baltic ports anticipate a further 10.7% increase in 2026, bringing the total number of calls to 2,249.

The number of calls has grown at an average annual rate of 1.7% since 2000, when there were 1,465 calls. Call numbers remain below pre-COVID levels, with an average annual decline of -4.9% between 2019 and 2025.

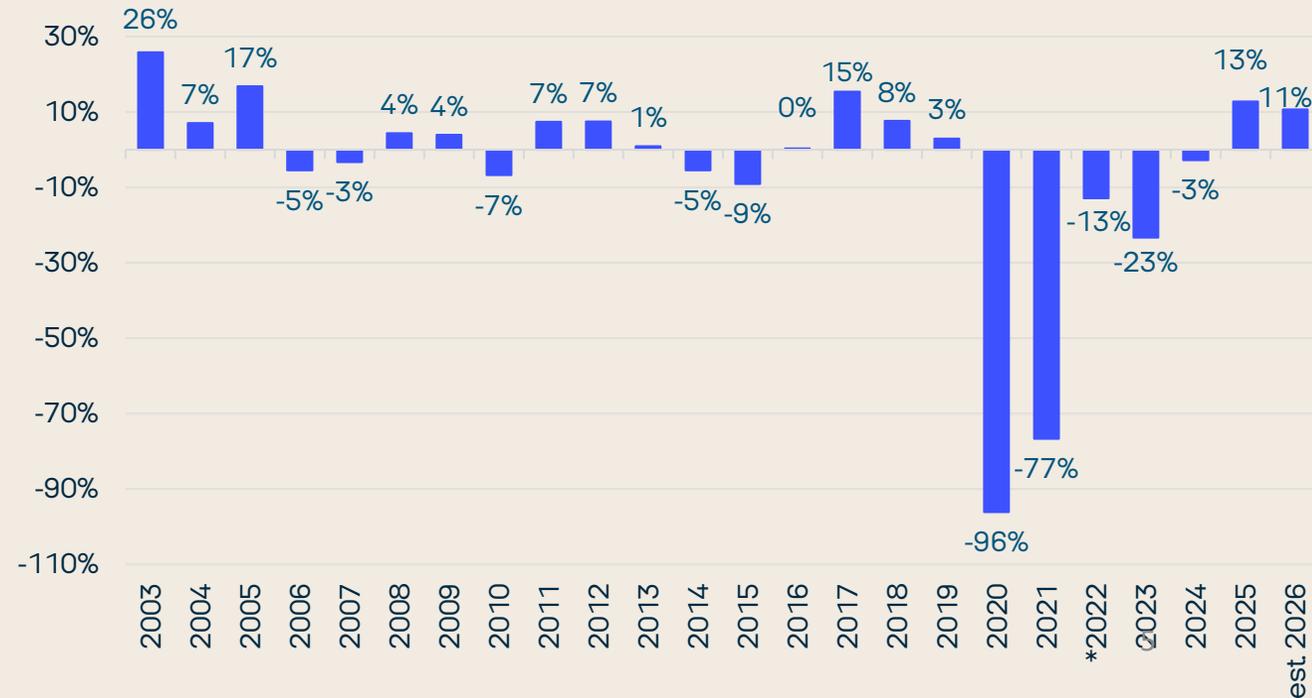
After the rebound in 2022, call numbers eased in 2023 and declined slightly in 2024 as cruise lines adjusted deployment. The rise in 2025 reflects a partial return of capacity, though still below the 2019 peak.

Growth in 2025 is broadly shared across many ports, which means demand is widely spread, many ports are benefiting making the Baltic Sea Region more resilient.

Number of calls



Annual growth rate in number of calls

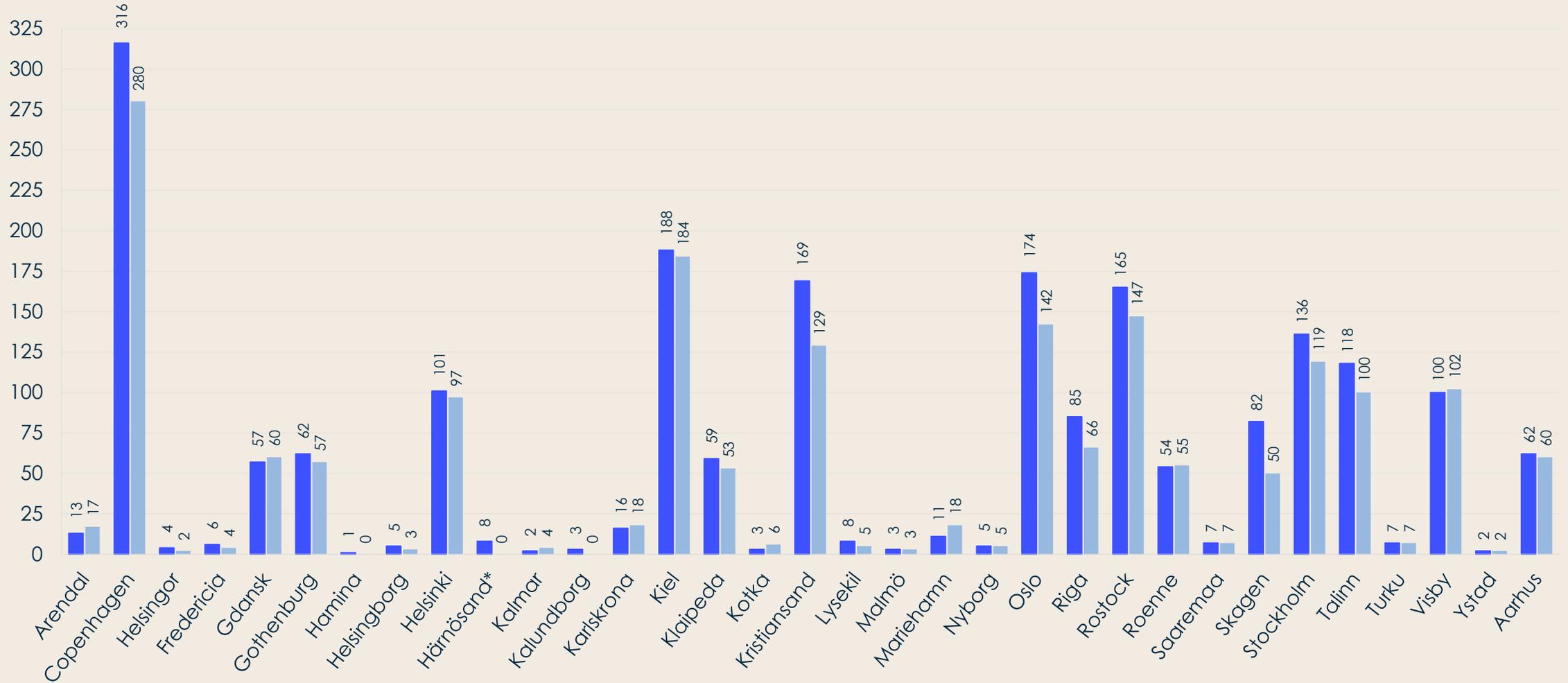


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Calls

■ 2025 ■ 2024

The below provides an overview of the Baltic ports in 2024 and 2025 and the number of cruise calls they each welcomed. In total, all 31 members ports plus Kiel and Malmö, welcomed cruise calls in 2025.



*members from 2025, so no data from 2024

Turnarounds

In 2025, the number of turnarounds increased with 5.6% from 431 in 2024 to 455.

In 2026 the Baltic ports anticipate a further increase of 7%, bringing the total number of turnarounds to an estimated 487.

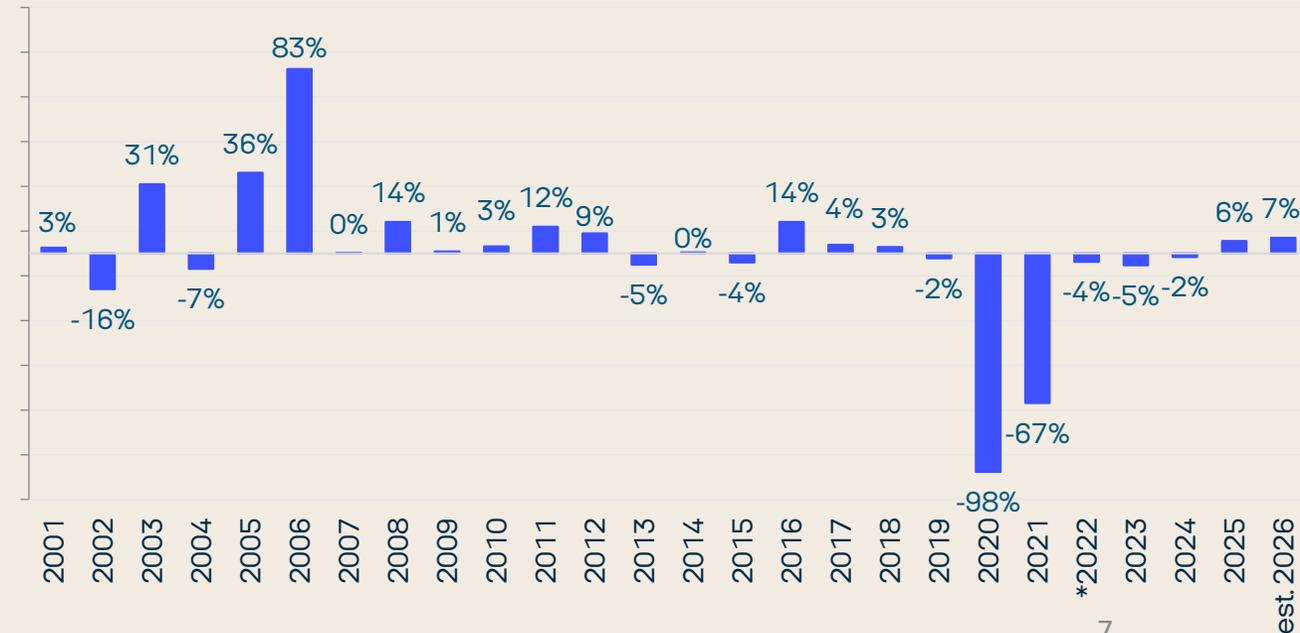
Over the longer term, turnarounds have grown at an average annual rate of 5.6% since 2000, when there were 116 turnarounds.

Between 2019 and 2025, the total number of turnarounds decreased by 0.9%, from 481 in 2019 but with the expected growth in 2026, turnarounds are projected to **exceed pre-COVID levels**.

Number of turnarounds

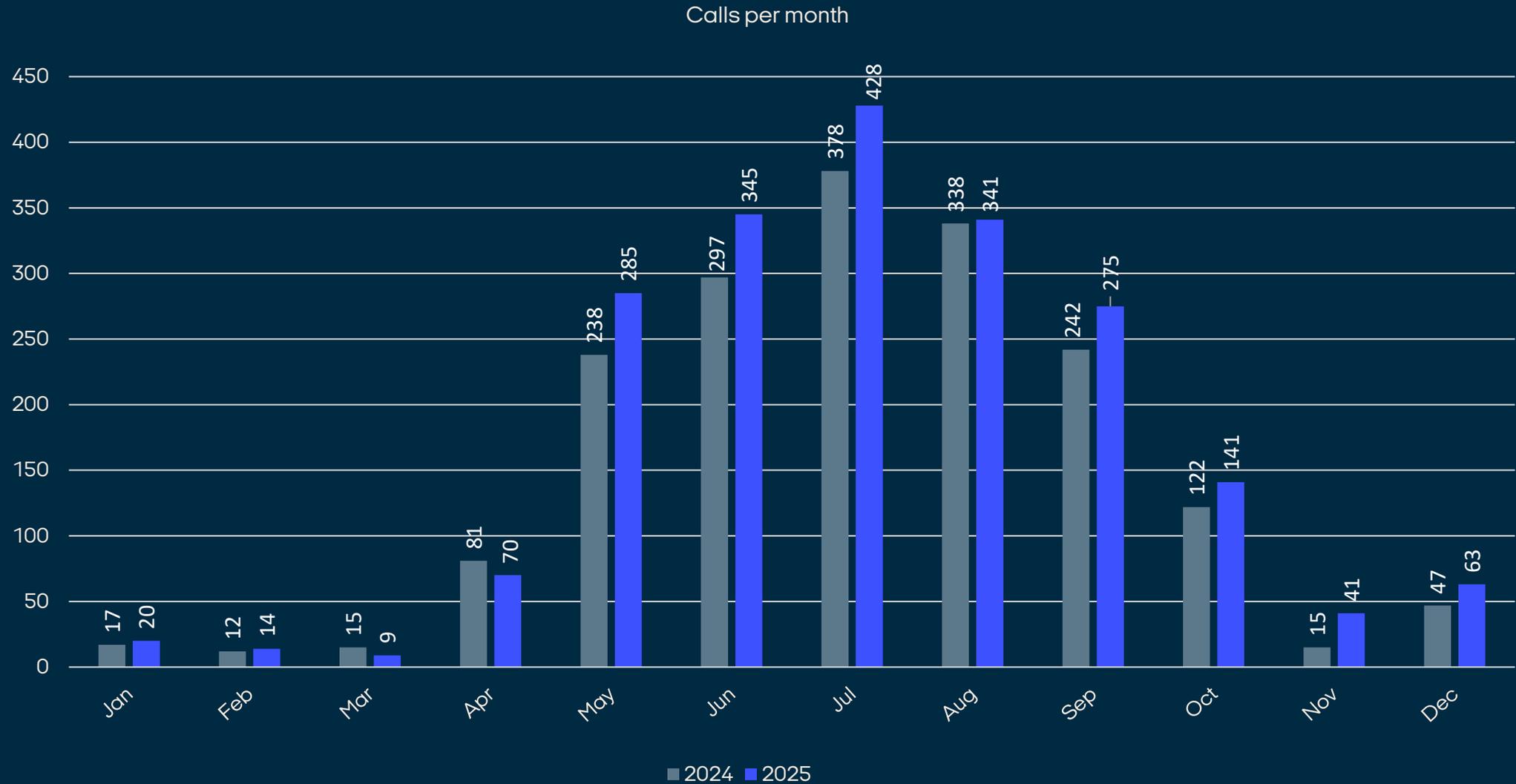


Annual growth rate in number of turnarounds



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Number of calls per month in 2025



Number of calls per month in 2025 - *continued*

The purpose of monitoring the number of cruise calls per month is to identify emerging trends across the Baltic ports.

Peak season remains stable

July was again the busiest month in 2025 [428 calls], followed by June [345] and August [341]. June increased slightly year-on-year, while August remained stable.

Shoulder season continues to strengthen

May and September together accounted for 560 calls, confirming sustained demand outside the core summer months.

The biggest change: Strong growth in the off-season

Q4 calls rose sharply to 245 in 2025, up from 184 in 2024 [+33.2%].

“Christmas Calls” continued to expand: 63 in December 2025, up from 47 in 2024 and 44 in 2023.

Q1 remains stable – but dramatically changed from earlier years

Q1 2025 matched the level of 2024.

Compared with 2023, when only 3 calls were recorded during Q1, the shift in seasonal distribution is significant.

The Baltic cruise season is becoming more evenly distributed across the year, with especially **strong growth in Q4** and solid performance in the shoulder months.

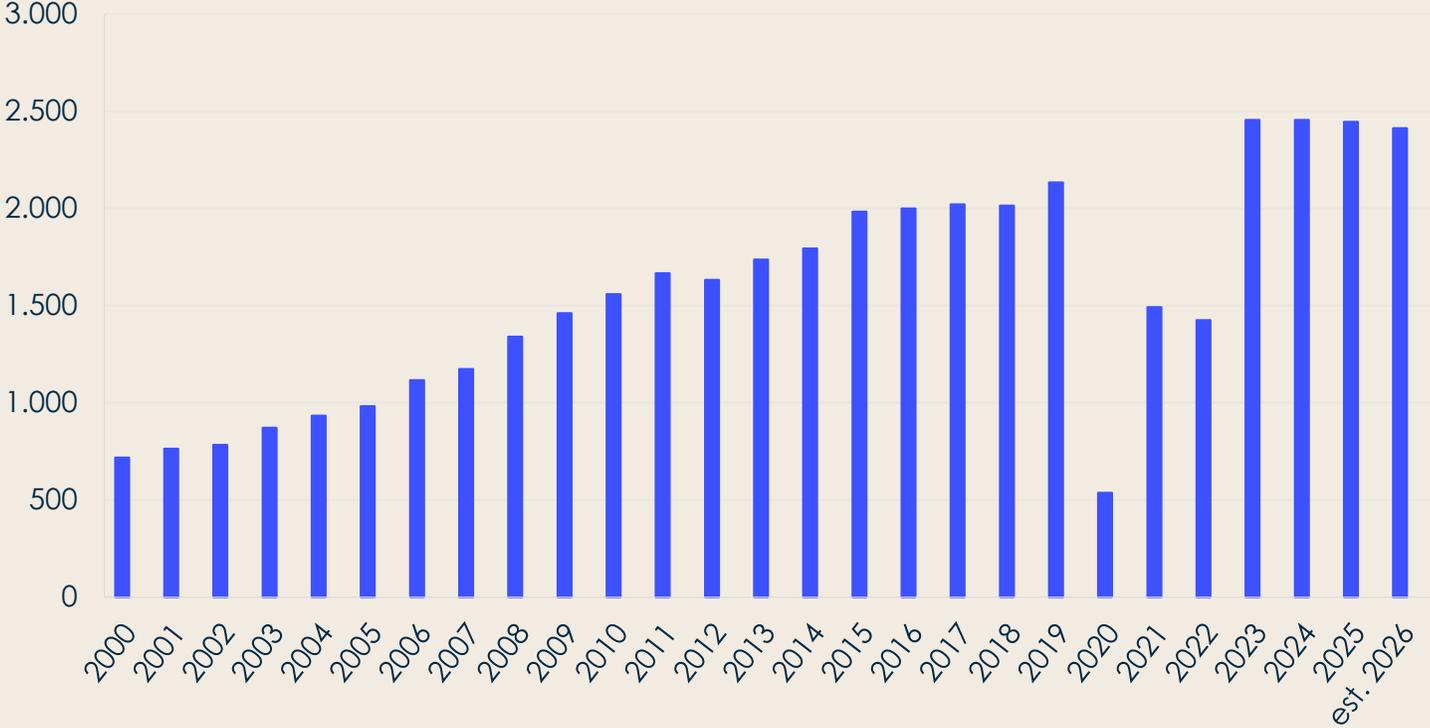
Number of guests per call

The average number of cruise guests is expected to decrease slightly in 2026 compared to 2025. In 2025, the average number of guests per call was 2,446 and is expected to decrease to 2,413 in 2026.

In the last 10 years [from 2015 to 2025], the average number of cruise guests per call has increased from 1,983 to 2,446. An increase of cruise guests per call, equivalent to 23.3%.

The growth from 2015 to 2025 is presumably a result of more larger vessels being built and deployed in the region.

Despite the rise in both calls and passenger numbers, the slight decrease in guests per call anticipated for 2026 may be the result of more smaller cruise lines visiting the region.



Number of overnights in 2025

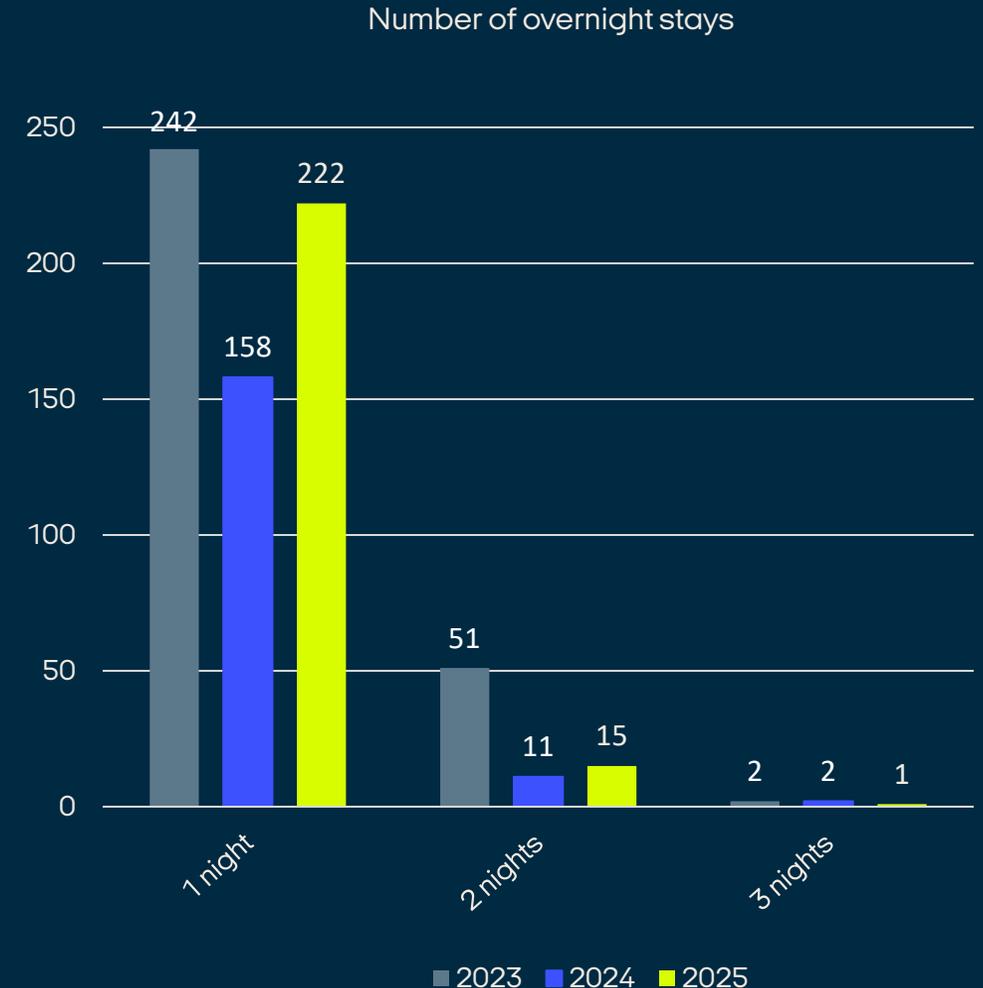
Since 2017, overnight calls in the Baltic Sea region have been monitored to identify trends in extended port stays.

One-night calls continue to far outnumber two-night calls, a pattern consistent since 2018.

In 2025, the region recorded 238 overnight stays, up from 171 in 2024, but still below the 295 registered in 2023 and concentrated across fewer destinations. In 2025, six destinations hosted one-night calls, while only two destinations received calls of two nights or more [down from 13 and 5 destinations respectively in 2024].

Most overnight stays in 2025 were concentrated in **Oslo**, **Stockholm** and **Tallinn**, with additional volume in Rostock and Riga. By contrast, Copenhagen and Helsinki saw notable overnight activity in 2024, a trend not repeated in 2025.

The number of overnight stays is rising again, but ships are still reluctant to stay longer than one night.



Cruise Baltic Segments

Extra Small [0-4 calls]	Hamina [1], Ystad [2], Kalmar [2], Kalundborg [3], Malmö [3], Kotka [4], Helsingor [4]
Small [5-24 calls]	Nyborg [5], Helsingborg [5], Fredericia [6], Turku [7], Saaremaa [7], Härnösand [8], Lysekil [8], Mariehamn [11], Arendal [13], Karlskrona [16]
Medium [25-49 calls]	-
Large [50-199 calls]	Roenne [54], Gdansk [57] Klaipeda [59], Aarhus [62], Gothenburg [62], Skagen [82], Riga [85], Visby [100], Helsinki [101], Tallinn [118], Stockholm [136], Kristiansand [161], Rostock [165], Oslo [174], Kiel [188]
X-Large [200+ calls]	Copenhagen [316]

The above is based on 2025 calls.

Since 2024 Sassnitz are no longer part of the small segment since they are no longer part of Cruise Baltic.

We have introduced a new segment Extra Small for 0-4 calls, who were previously in the Small category. No other changes since 2024.

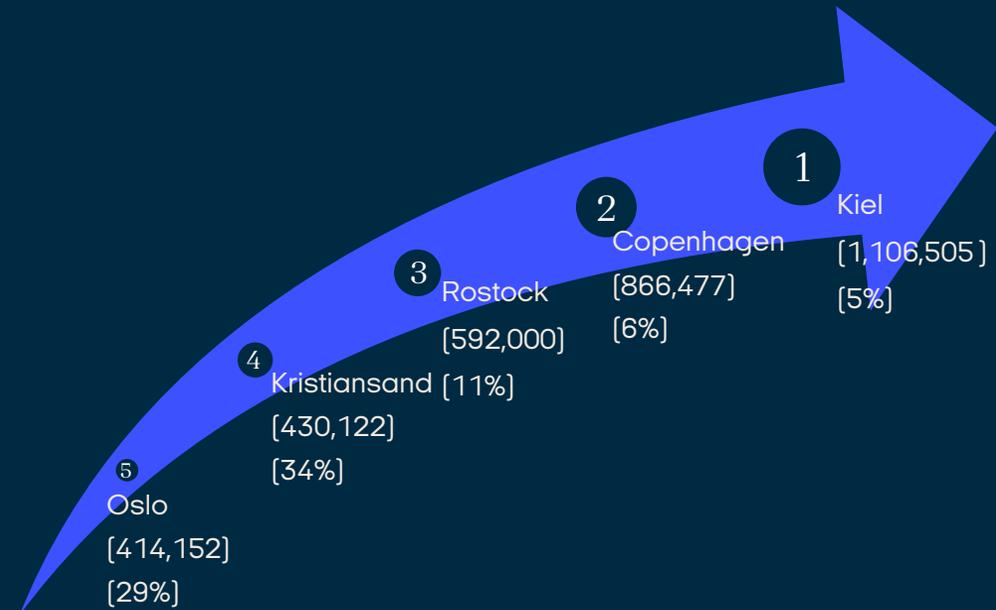
Top 5: Amount of guests in 2025

Kiel is still the largest port in terms of guests followed by Copenhagen.

Kristiansand had the highest growth rate. Growing from 320,446 guests in 2024 to 430,122 in 2025 which is equivalent to an increase of 34.2%.

Since 2024, there has been no change in the Top-5 which matches the expectations from last year, except Kristiansand now exceeds the levels of guests in Oslo.

Expectations for the Top-5 in 2026 also show no change in the listing except Oslo is expected to exceed Kristiansand again.

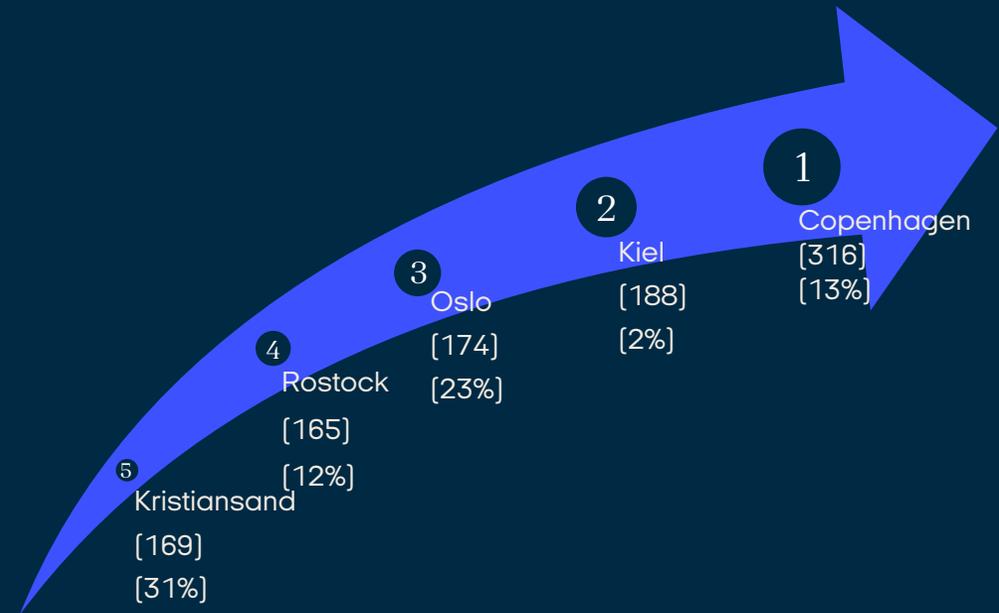


Top 5: Calls in 2025

In 2025, calls increased across the current Top-5 ports, with Oslo moving from 4th to 3rd place.

Following the pandemic and the closure of St. Petersburg to cruise traffic, the Top-5 has shifted. Prior to this, ports such as Stockholm, Tallinn and Helsinki were consistently among the Top-5 ports alongside Copenhagen and St. Petersburg. While these ports are now seeing increasing call numbers [with the exception of St. Petersburg], they have not yet returned to pre-pandemic levels.

The current ranking therefore reflects a structural shift in deployment patterns in the Baltic Sea region. Looking ahead to 2026, the Top-5 ports are expected to remain unchanged. However, Stockholm is projected to come very close to Kristiansand in number of calls, potentially leading to another change in the ranking, with Tallinn not far behind.



Top 5: Turnarounds in 2025

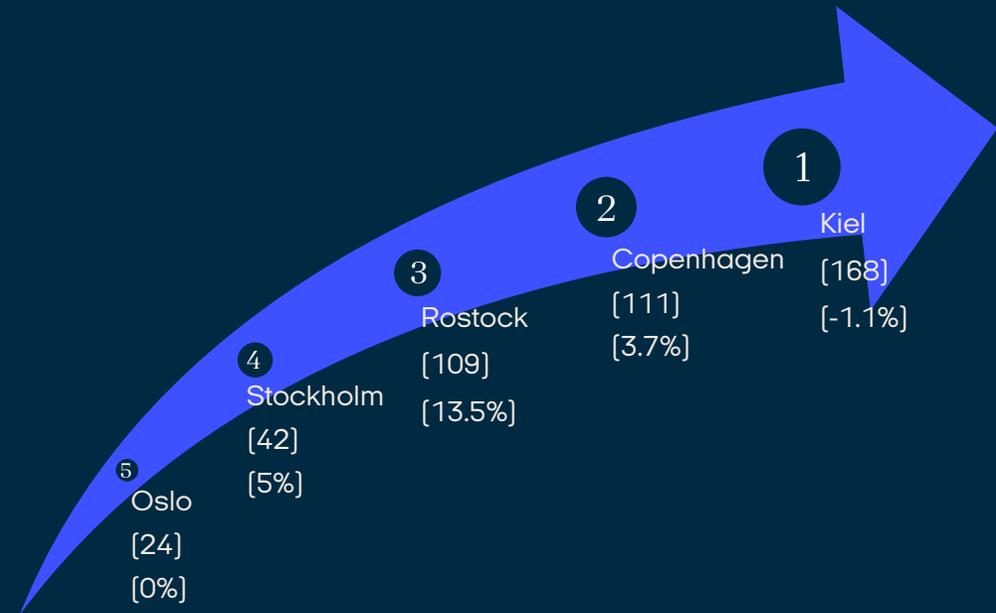
In the Top-5 listing, Rostock experienced the highest increase in turnarounds from 2024 to 2025, going from 95 to a total of 109. Stockholm and Copenhagen also increased slightly.

The destination in top, Kiel, decreased slightly in the number of turnarounds compared to 2024.

Since 2019, Kiel has been the largest turnaround port in the Baltic Sea region and is expected to continue like that in 2026.

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 2026 show no change in the listing, although it is projected that Helsinki again will be welcoming turnaround calls at the same level as in 2019 and Malmö will have 10 turnarounds which they haven't had since 2014.



The X-Large Ports

[200+ Calls]

In 2025, the X-Large Ports consist solely of Copenhagen [316]. In 2023 both Copenhagen and Kiel were part of the segment.

The X-Large Port [Copenhagen] remains at par with calls in 2025 while increasing the number of pax overall by 2% [from 866,477 in 2025 to an estimated 880,000 in 2026], while turnaround have increased significantly by 10% [111 in 2025 to 122 estimated in 2026].





The Large Ports

[50-199 Calls]

The Large Ports consist of Roenne [54], Gdansk [57] Klaipeda [59], Aarhus [62], Gothenburg [62], Skagen [82], Riga [85], Visby [100], Helsinki [101], Tallinn [118], Stockholm [136], Kristiansand [169], Rostock [165], Oslo [174], Kiel [188]

The Large ports had 1,612 calls in total in 2025, which is an increase of 13.4% since 2024. The segment is expected to increase in 2026.

In 2025, Oslo [24], Stockholm [42], Rostock [109], and Kiel [168] had turnaround calls. Kristiansand had one turnaround call.

In 2026, Oslo [28], Stockholm [32], Rostock [95] and Kiel [187] are expected to receive turnaround calls again and Helsinki [13] is expected to receive some as well.

The Extra Small & Small Ports

[0-4 & 5-24 Calls]

The Extra Small and Small ports consist of Hamina [1], Ystad [2], Kalmar [2], Kalundborg [3], Malmö [3], Kotka [3], Helsingor [4], Nyborg [5], Helsingborg [5], Fredericia [6], Turku [7], Saaremaa [7], Härnösand [8], Lysekil [8], Mariehamn [11], Arendal [13], Karlskrona [16]

This segment had 104 calls in 2025, which is a decrease of -4.6% from 2024. Karlskrona is expected to move to the medium segment in 2026 as the only port in the Cruise Baltic Network in this segment.

In 2025 no ports in the extra small or small segment had turnaround calls and status quo is expected in 2026.

In 2026, the number of calls in the extra small and small segment is expected to increase by 10.6% to 115 calls, despite Karlskrona moving segment.



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.

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