

pro DANUBE

ANNUAL REPORT

2025

& OUTLOOK

2026





FOREWORD



HERFRIED LEITNER

CHAIRMAN

Pro Danube is dedicated to advancing sustainable growth, innovation and collaboration within the Danube Inland Waterway Transport sector. These guiding principles shape our initiatives and support the development of efficient and forward-looking activities.



RÓBERT RAFAEL

GENERAL SECRETARY

Our goal is to transform challenges into opportunities while strengthening a resilient and dynamic Danube Inland Waterway Transport sector that is prepared to meet the demands of the future.





DISCLAIMER

This document is intended for informational purposes only. The association shall not be held liable for any decisions or actions taken based on the information provided. References to specific organizations or services do not constitute endorsement.





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REFLECTIONS ON 2025

In 2025, Pro Danube continued to advance its mission of strengthening the role of inland waterway transport along the Danube corridor, while contributing to the broader European objectives of sustainable, efficient and resilient transport systems. Throughout the year, the organisation continued to serve as a key platform connecting stakeholders across the Danube region, fostering dialogue, innovation, and practical solutions aimed at enhancing the efficiency and resilience of inland navigation.

MEMBERSHIP EXPANSION

We are delighted to welcome Frequentis AG, Aditya Birla Global Trading (Austria) GmbH and YES Marine Group to our association. Their inclusion brings diverse perspectives, expertise and a shared commitment to the sustainable development of the Danube Inland Waterway Transport sector. Together, we strengthen the foundation of our community and amplify our collective impact.

VOICE OF THE SECTOR

Pro Danube actively engaged in expert group meetings such as the DINA and NAIADES Expert Groups Meetings, the EUSDR and the Rhine-Danube Corridor Forum Meetings as well as the FAIRway Danube II Stakeholder Forum Meetings and Advisory Committee meetings. Pro Danube conveyed the sector's messages to the new European Coordinator of the TEN-T Rhine-Danube Corridor.

HIGH LEVEL EVENTS

A notable highlight of the year has been the organisation of the 2025 edition of the Danube Ports Days.

The event streamlined actual topics including innovative solutions to foster energy efficiency, to further enhance digitalisation and to improve the quality of service and reliability of inland waterway transport and port operations.

COOPERATION

Pro Danube has consistently demonstrated its commitment to fostering cooperation by maintaining strong ties with European sector organisations.

A strategically important development in the fairway-related topics has been the initiation of a dialogue between the Romanian waterway administration AFDJ, the Bulgarian waterway administration APPD and the sector, in which PDI and several of its members have participated and will continue to participate. This process reflects an initiative strongly supported by PDI and represents a positive outcome, as the Romanian and Bulgarian waterway managers have taken up this call for action, further strengthening cooperation within the sector.





ADVANCING INNOVATION AND DIGITALISATION IN INLAND PORTS

Inland ports play a strategic role in advancing collaboration and innovation across Europe's transport and logistics networks. Serving as multimodal hubs that integrate waterways, rail and road, they facilitate efficient cargo flows while supporting sustainable and climate-neutral transport solutions. By fostering knowledge exchange, supporting digitalisation and investing into smart infrastructure development, while promoting energy efficiency and paying attention to their environmental performance, inland ports contribute directly to the objectives of the European Green Deal, the TEN-T Core Network Corridors and the EU Strategy for Sustainable and Smart Mobility.

Pro Danube and some of its members advocated and made substantial progress in port-focused projects like MultiRELOAD and the Green Inland Ports Study (GRIP), emphasising the pivotal role of ports in shaping a resilient, sustainable and smart logistics network. Pro Danube has also followed closely the progress of the PIONEERS project and the Innovation Action SYNERGETICS. The GRIP study is set to play a crucial role in shaping policies and strategies to enhance the sustainability of inland navigation, addressing the growing need for eco-friendly practices within the industry. Pro Danube plays a crucial role in the Green Inland Ports Study, particularly focusing on the digitalisation of ports.

PORT DIGITALISATION

Port digitalisation involves the application and integration of digital technologies to enhance various port processes, aiming to improve efficiency, streamline operations, reduce risks, lower costs, minimise environmental impact and provide better services throughout the port industry and supply chain. As part of the GRIP study, PDI offered expertise to the development of the **Digitalisation Masterplan** which provides a structured approach to help ports in

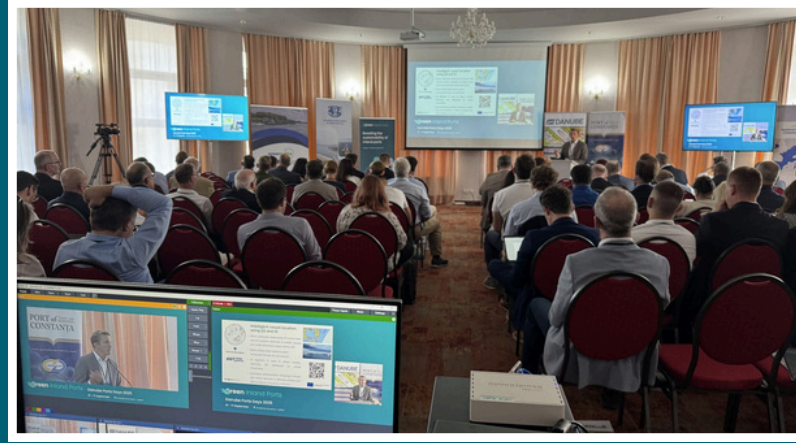
their digitalisation process, offering guidance suitable for all levels of digital maturity. With tailored recommendations, phased actions and a clear roadmap, the Masterplan helps ports become smarter and more connected.

PORT INNOVATION & LOGISTICS EXCELLENCE

Moreover, Pro Danube brought in its expertise to the MultiRELOAD project, which aims to facilitate a significant shift to sustainable transport, improve supply chain efficiency and encourage capacity-sharing in crucial TEN-T corridors, with a specific focus on the Rhine-Alpine and Rhine-Danube Corridors. Pro Danube actively contributed to the organisation of the **2026 Inland Ports Innovation Days**, participating in discussions on innovative solutions, digitalisation and sustainable development for inland ports. The event provides a valuable platform for exchange with key stakeholders and for promoting collaborative approaches to enhance the performance and resilience of inland port operations.



BUILDING ON A STRONG LEGACY



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Organised on 16 and 17 September by Pro Danube and hosted by the National Company Maritime Ports Administration SA Constanta, the Danube Ports Days 2025 event brought together policymakers, industry leaders and experts to discuss and evaluate innovative solutions aimed at achieving sustainability and digitalisation within inland ports and inland waterway transport.

Welcoming the largest number of participants so far - around 150 participants - for rich discussions and valuable networking, the 2025 edition provided a valuable platform to gather insights from regional stakeholders, looking into innovative solutions to foster energy efficiency, to further enhance digitalisation and to improve the quality of service and reliability of inland waterway transport and port operations.



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WELCOME ON BOARD



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The progress achieved during the year of 2025 reflects the collective efforts of Pro Danube's members, whose cooperation and expertise remain essential for advancing the sector. Throughout the year, Pro Danube has recorded a number of important milestones and achievements. Most importantly, the continued growth of our membership has further strengthened the association and reinforced our shared commitment to the development of the sector.

MEMBERSHIP EXPANSION

A notable highlight of 2025 was the expansion of the Pro Danube network through the welcoming of several new members: Frequentis AG, Aditya Birla Global Trading (Austria) GmbH and YES Marine Group. This steady growth further strengthens the association and reflects the increasing engagement of stakeholders across the Danube region. The new members bring valuable expertise, broaden the diversity of perspectives within the network and share a common commitment to supporting the sustainable development of the Danube IWT sector.





VOICE OF THE SECTOR



Pro Danube actively engaged in key expert and stakeholder platforms, including the DINA and NAIADES Expert Group meetings, the EUSDR and Rhine-Danube Corridor Forum sessions, as well as the FAIRway Danube II Stakeholder Forum and Advisory Committee meetings. These engagements supported the implementation of EU policy frameworks for inland waterway transport, contributing to the objectives of the European Green Deal, the EU Strategy for Sustainable and Smart Mobility and the coordinated development of the European Transport Corridors.

COOPERATION FOR THE BENEFIT OF THE SECTOR

All these engagements enabled Pro Danube to contribute with technical expertise, share operational data and provide practical insights into the challenges and opportunities of inland waterway transport. By participating in these high-level forums, the organisation ensured that the perspectives of the Danube navigation sector were reflected in EU policy discussions and decision-making processes.

Through active participation, Pro Danube contributed to harmonised approaches to navigation safety, environmental protection and infrastructure planning. These initiatives are critical to achieving EU objectives for decarbonisation, digitalisation and increased resilience in the transport networks, while also fostering interoperability and connectivity across the Danube and broader European inland waterways.





INFORMED MEMBERS, STRONGER NETWORK

Ensuring that our members remain fully informed about emerging industry trends, regulatory developments and new opportunities is a cornerstone of Pro Danube's work. By maintaining a proactive dialogue and closely monitoring the evolving Danube Inland Waterway Transport landscape, we aim to enable our members to make informed decisions and collectively unlock the sector's full potential.

PRO DANUBE NEWSLETTER

At Pro Danube we are committed to foster progress and innovation in our industry. We believe in keeping our community informed and engaged and for this, we publish a monthly newsletter. Additionally, we offer exclusive broadcasts of hot topics in "**Have Your Say**" and "**Important Information**", a feature reserved for our valued members.



PRO DANUBE LINKEDIN PAGE

With its interactive features, networking capabilities, and content-sharing options, Pro Danube's LinkedIn presence is a central hub for IWT professionals and enthusiasts alike seeking real-time insights into the latest developments within the Danube IWT sector and well beyond.





PATH FORWARD



2026 promises continued collaboration, innovation and progress. Together, we will sail the path to a greener, more resilient inland waterway transport sector in the Danube Region. Building on the achievements of the past years, Pro Danube and its members will continue to advance a greener, more resilient and sustainable inland waterway transport sector across the Danube Region.

CONCRETE SOLUTIONS

Advocacy alone will not be sufficient to meet the sector's decarbonisation objectives. In 2026, we will continue to actively contribute to European initiatives that deliver concrete and scalable solutions in support of the inland waterway transport sector's transition towards climate neutrality, in line with the objectives of the European Green Deal and the Fit for 55 package.

In parallel, we will continue to advocate for the effective implementation of the TEN-T Regulation, with a particular focus on ensuring adequate fairway maintenance and advancing sustainable port development. These elements are essential to strengthening the resilience, efficiency, and modal shift potential of inland waterways, thereby contributing to a well-functioning and future-proof transport system within the EU.

Looking ahead to 2026, the dialogue established between the Romanian waterway administration AFDJ, the Bulgarian waterway administration APPD and the sector is expected to continue and further consolidate, contributing to improved cross-border coordination and more effective implementation of fairway maintenance measures in line with the TEN-T Regulation.

Also, crewing-related harmonisation initiatives in the IWT sector will be a key focus of PDI in 2026, with continued efforts expected to enhance workforce mobility, strengthen safety standards and support the efficient functioning of the European inland navigation market.

CLOSER TO OUR MEMBERS

Since its launch in May 2024, the Pro Danube Coffee Break has established itself as a valuable platform for continuous dialogue with our members. Looking ahead to 2026, this initiative is expected to remain an important tool for addressing key developments and emerging challenges within the IWT sector. By fostering informal yet focused discussions on priority topics, it supports timely exchange and alignment within the industry.





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