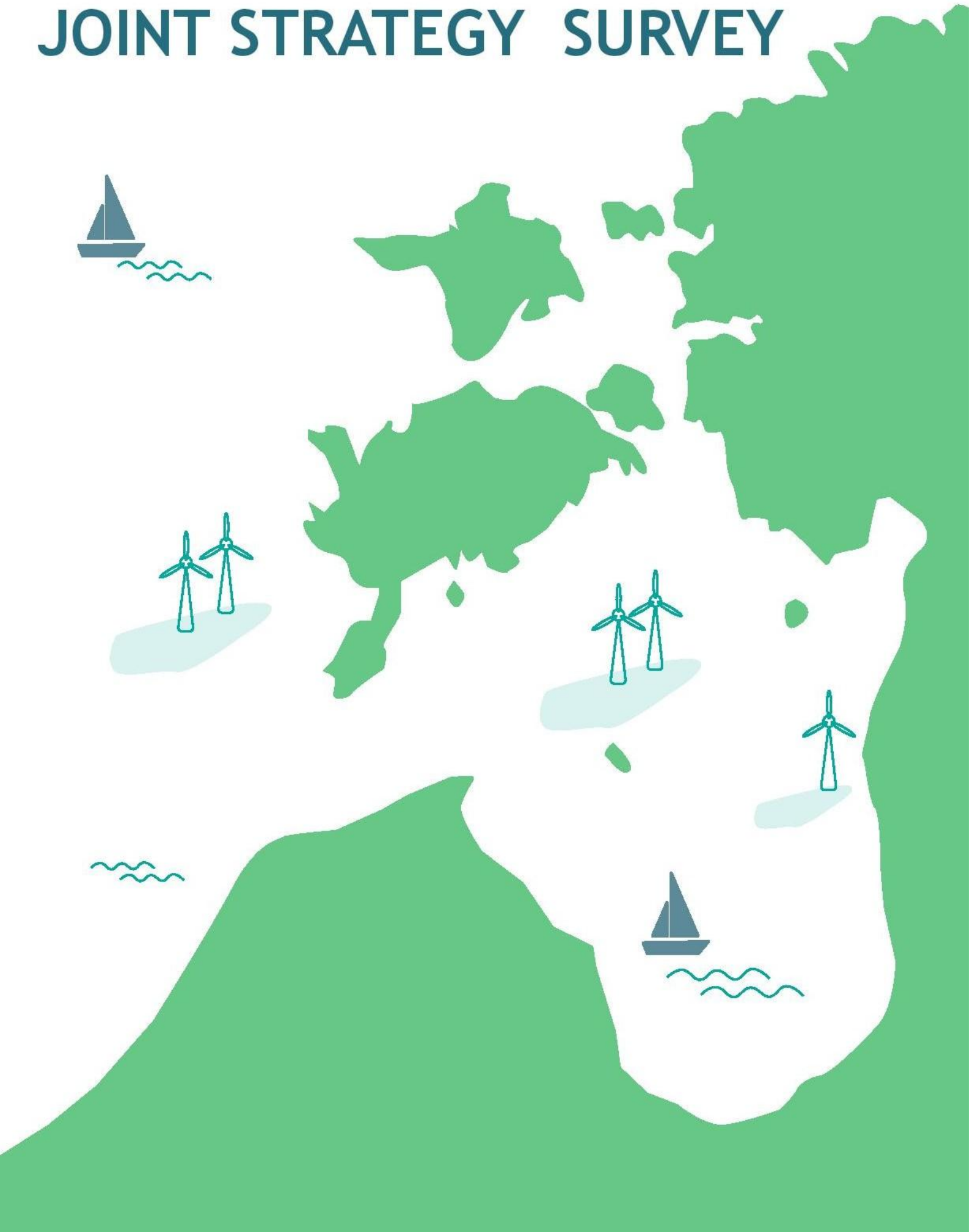
ESTONIAN-LATVIAN HARBOURS JOINT STRATEGY SURVEY



Interreg
Estonia – Latvia

Co-funded by the European Union

THE ESTONIAN-LATVIAN HARBOURS JOINT STRATEGY SURVEY

MONITORING, 2026

COMMISSIONED BY THE ASSOCIATION OF ESTONIAN MARINE INDUSTRIES

EE-LV00063 HARBOURS AND PPP

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KURESSAARE, 2026

CONTENTS

INTRODUCION

The aim of the Estonian-Latvian harbours joint strategy survey was to provide a basis for harbour development plans in the municipalities of Talsi, Saaremaa and Hiiumaa, taking into account the development of offshore wind farms in the Latvian and Estonian marine areas. Based on the survey, harbour development plans were prepared for Saaremaa, Hiiumaa and Talsi.

The objective of monitoring and updating the Estonian - Latvian harbours joint strategy survey is to assess changes in the operating environment of the harbours, their strategic importance, and the potential implications for the harbour development plans prepared within the project. The analysis should determine which components of the baseline analysis require updating and at what frequency.

The monitoring and update process includes:

- Monitoring of the baseline analysis (Estonian - Latvian harbours joint strategy survey), together with updates to analytical and presentation outputs (maps, schemes, lists);
- Categorisation of information, including the expected frequency of change, data sources and anticipated strategic importance.

Monitoring is based mainly on the same indicators that were used in preparing the original baseline analysis.

1. MONITORING INDICATORS

Monitoring should be carried out at least on the basis of the same indicators that formed the basis of the baseline analysis of the harbours, or as agreed by the partners. The objective of monitoring is to observe developments in the Estonian and Latvian maritime areas, rather than to measure harbours performance in terms of tonnage or number of visits. The approach is therefore qualitative in nature.

The purpose of the analysis was to provide guidance for the development of harbours, not to establish quantitative indicators in the classical sense.

1.1. Marine transport

The volumes of cargo transport are determined more by the overall economic situation than by the capacity of the harbours. Therefore, a significant change in cargo transport is not happened. Cargo volumes from the harbours in the region are presented in the table 1.

TABLE 1. CARGO TURNOVER 2018 -2025[1] (THOUSAND TONNES)

Port/harbour	2018	2019	2020	2021	2022	2023	2024	2025
Riga	36431,9	32762,2	23712,1	21498,8	23519,9	18794,4	18062,5	16749,5
Ventspils	20325,9	20456,8	12902,1	11081,4	14746,4	10418,4	8234,1	8533,2
Liepaja	7537,6	7334,2	6603,2	7056,7	7608,6	7232,2	7048,7	6870,5
Pärnu	2100,0	2200,0	1700,0	1800,0	1700,0	2000,0	1900	
Skulte	998,5	1005,6	969,0	1098,1	1204,4	1119,3	1411,6	1016,8
Mersrags	456,8	468,2	402,4	504,1	551,7	556,1	687,3	630,6
Salacgriva	351,0	301,8	303,5	421,3	369,0	456,6	517	432,7
Roomassaare	393,1	320,4	318,6	365,4	351,6	420,0	379,8	398,8

1 Datas: https://www.transport.lv/en/ostas/satistika/, https://www.ts.ee/investor/pohinaitajad/, AS Saarte Liinid, annula reports of AS Pärnu Sadam

Port/harbour	2018	2019	2020	2021	2022	2023	2024	2025
Virtsu	361,8	350,5	398,5	414,9	320,6	281,4	177,1	221,9
Saaremaa	61,7	94,8	144,3	170,6	277,2	62,7	191,9	146,3
Heltermaa	143,8	116,2	95,3	125,5	144,7	91,2	153,1	150,4
Roja	70,2	47,1	58,1	70,3	78,3	78,2	50,8	47,6

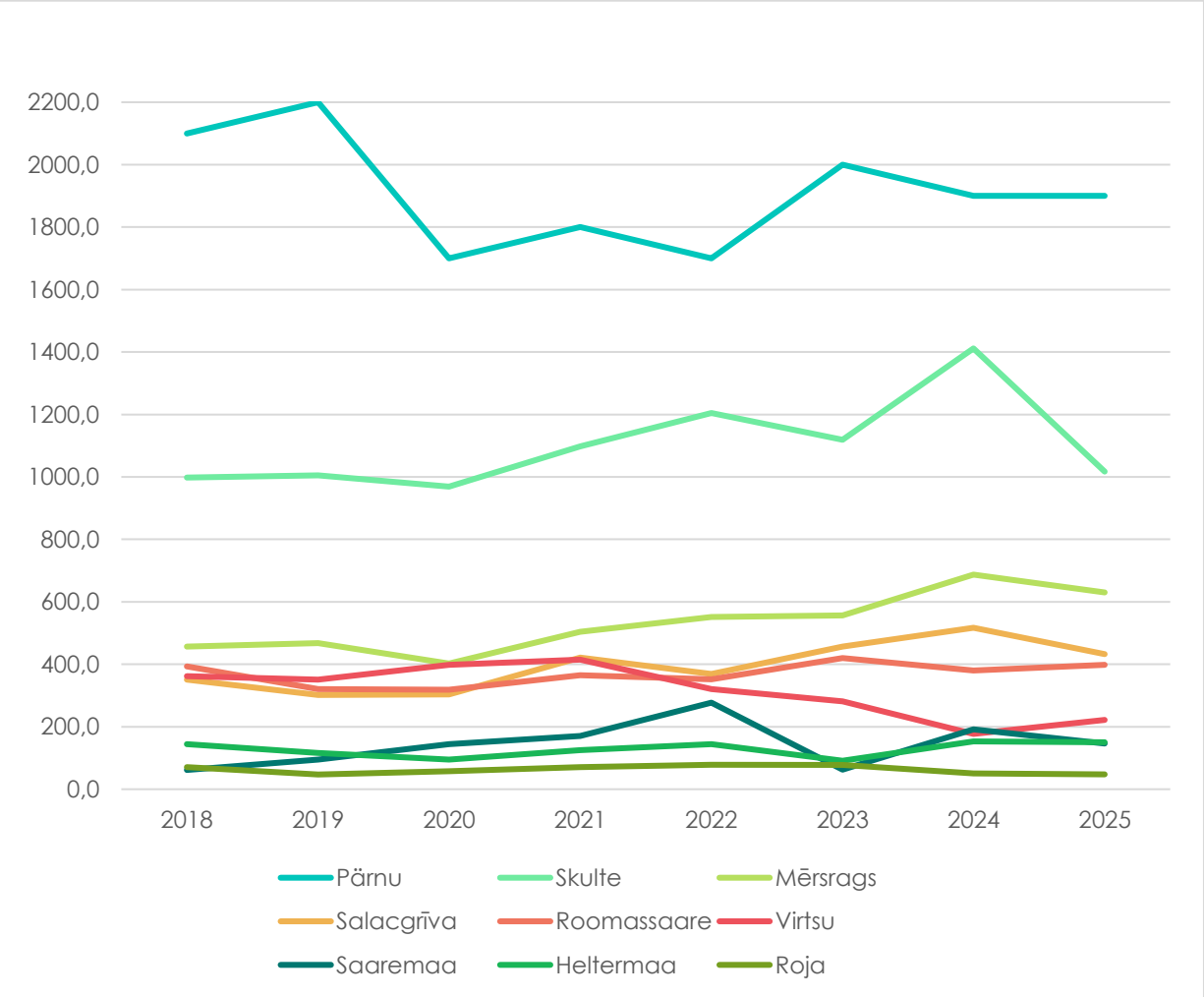

FIGURE 1. CARGO TURNOVER 2018 -2025[2] (THOUSAND TONNES)

2 Datas: *https://www.transport.lv/en/ostas/satistika/, https://www.ts.ee/investor/pohinaitajad/, AS Saarte Liinid, annula reports of AS Pärnu Sadam*

1.2. Fishing

The trawling has been relatively stable in recent years. Since fishing is regulated by quotas, no significant changes are expected. Quotas are generally stable or decreasing. For example, while the total herring quota in the Gulf of Riga was 39,200 tonnes in 2025, it is 34,367 tonnes in 2026. This represents a decrease of approximately 17% compared to 2025. The reduction has occurred at the expense of trawl fishing, which also reduces harbour revenues from fish unloading.

Fish unloading by harbour are presented in figure 2 and table 2.

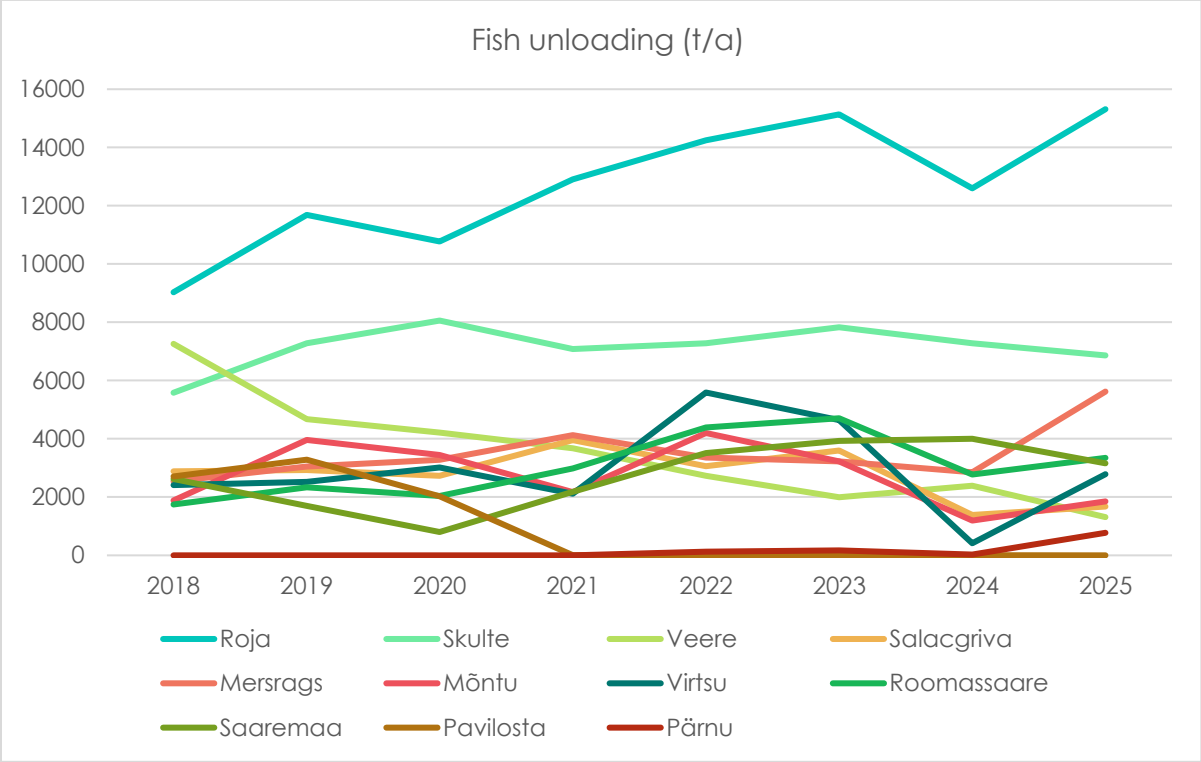

FIGURE 2. FISH UNLOADING BY HARBOURS 2018-2025

TABLE 2. FISH UNLOADING BY ESTONIAN AND LATVIAN FISHING VESSELS (INCLUDING ESTONIAN FISHING VESSELS IN LATVIA)

Harbour	2018	2019	2020	2021	2022	2023	2024	2025
Roja	9030,9	11682,8	10770,7	12907,4	14242,9	15133,0	12595,1	15314,5
Skulte	5582,0	7280,2	8059,5	7077,5	7276,5	7831,8	7281,6	6859,2
Veere	7259,5	4675,8	4217,2	3675,6	2735,6	1989,1	2394,5	1311,8

Harbour	2018	2019	2020	2021	2022	2023	2024	2025
Salacgriva	2887,7	2930,0	2730,7	3954,9	3064,9	3604,0	1386,8	1679,4
Mersrags	2540,7	3044,4	3282,5	4127,8	3359,8	3225,2	2853,8	5621,1
Mõntu	1884,8	3962,4	3442,1	2172,0	4199,5	3220,5	1194,2	1853,3
Virtsu	2415,8	2525,7	3017,6	2110,0	5589,3	4640,8	414,9	2787,1
Roomassaare	1746,3	2337,7	2038,1	2979,1	4388,2	4706,1	2771,7	3343,3
Saaremaa	2616,6	1695,6	801,0	2178,6	3512,0	3927,5	4001,8	3163,8
Pavilosta	2712,0	3283,6	2027,4	0,3	0,2	0,9	0,3	0,1
Lehtma	0,0	0,0	0,0	1457,7	0,0	0	0	0
Pärnu	0,0	0,0	0,0	0,0	131,7	174,2	25,8	773,7
Heltermaa	0,0	0,0	11,6	0,0	0,7	0	0	0
Sõru	0,0	0,0	0,0	0,0	0,6	0	0	0

1.3. Maritime tourism

Monitoring of small harbour visitors for 2023 - 2025 could not be carried out, as data submission by harbours in Estonia is voluntary and the data held by the Transport Administration have been highly incomplete since 2023. For example, data are missing for all harbours operated by Saarte Liinid.

Even if data for Latvian harbours are complete, reliable conclusions cannot be drawn when part of the data is missing.

1.4. Aquaculture

The prospects for aquaculture have become more certain with regard to fish farming. Whereas in 2024 several superficies licence procedures for fish farms were still pending, there are now five valid superficies licences for fish farming in Estonia: three near the Tagamõisa peninsula on Saaremaa and two off the coast of Hiiumaa near the harbours of Sõru and Kalana (Figure 3). In addition, two superficies licence applications have been submitted north of Kõrgessaare harbour on Hiiumaa (approximately 10 km offshore) – by Eesti Sinitaristu OÜ and Nordic Trout AB. To date, fish are cultivated only by Redstorm OÜ in sea cages located near Veere harbour.

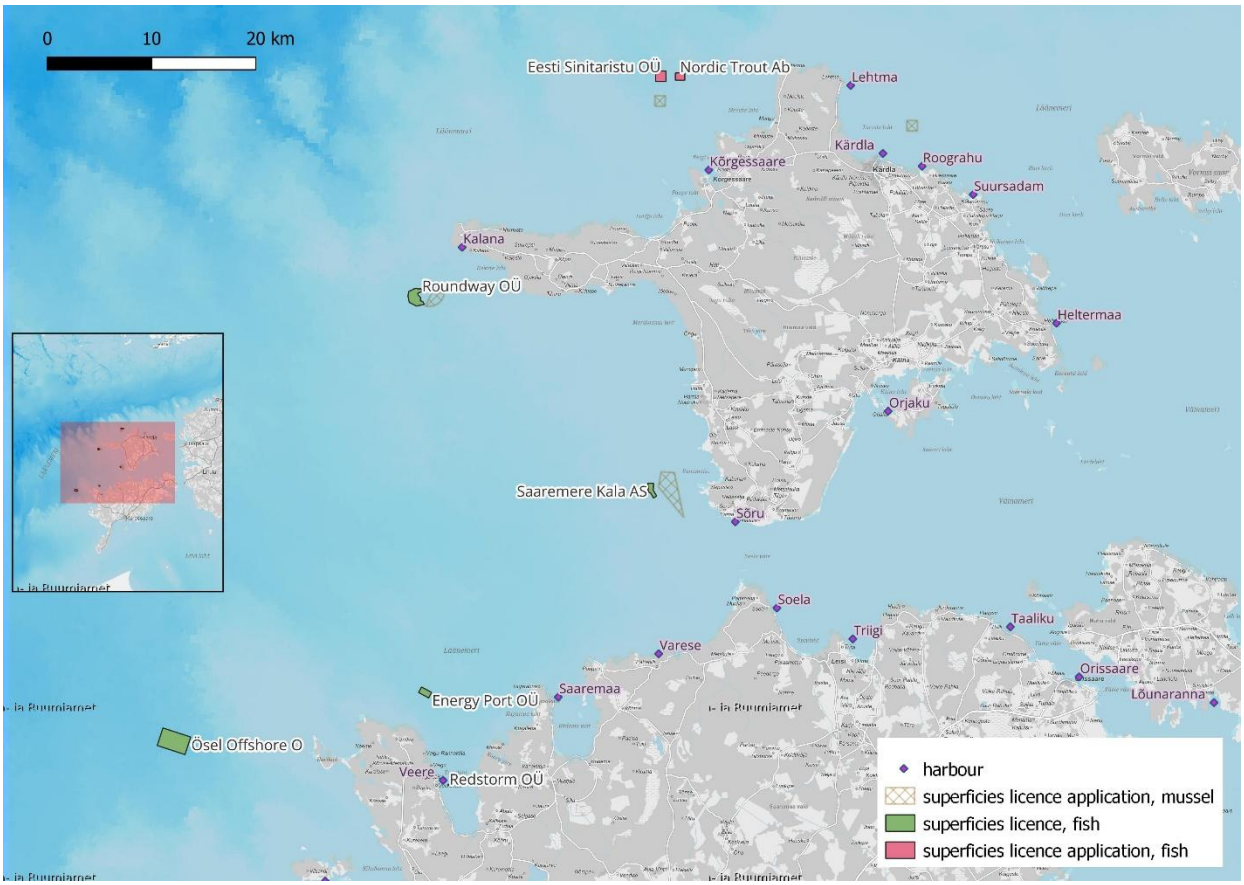

FIGURE 3. AQUACULTURE 2026

For shellfish farming, a superficies licence has been granted in Tagalaht Bay on Saaremaa, where OÜ Agua Verde is experimentally cultivating edible blue mussels. Four additional superficies licence applications for algae and shellfish farming are under consideration along the coast of Hiiumaa. At the same time, Est-Agar AS, which processes the red algae *Furcellaria lumbricalis*, has significantly reduced its production, and the harvest of this species has declined accordingly. While 181 tonnes were harvested in 2024, only 1.8 tonnes were harvested in 2025 – a hundredfold decrease.

The north-western waters of Saaremaa and the western waters of Hiiumaa are clearly emerging as the main aquaculture development areas, creating opportunities in particular for the harbours of Veere, Sõru, Kalana, Kõrgessaare and Saaremaa.

It should be noted that areas suitable for aquaculture were already designated in the Marine spatial plan of Hiiu County[3] approximately ten years ago. While the selection of these areas took into account their distance from potential service harbours, it did not consider whether the harbours had the technical capacity to support aquaculture operations.

Today, as the first superficies licenses have been granted to fish farmers, it has become evident that the potential service harbours: Kalana, Sõru and Kõrgessaare require additional investments for dredging etc. This highlights a similar issue as observed with offshore wind farms, where marine spatial planning tends to overlook the fact that the development of the blue economy critically depends on the readiness of harbours.

A harbour is not merely a point on a map, but should meet the operational needs of its users. Aquaculture is still a relatively new sector, and harbours often lack prior experience in supporting it. Therefore, cooperation between fish farmers and harbours should begin at an early stage of project development in order to identify and secure the necessary investments.

In Latvia, in the aquaculture permit areas "Roja" and "Mērsrags" in the Gulf of Riga, designated by the Cabinet of Ministers on 13 August 2024, no rapid developments have taken place. The Ministry of Agriculture auctioned the designated areas for trout farming, and one company obtained the right of use. The environmental impact assessment is currently being prepared by the company. Public discussions have already emerged regarding potential negative impacts, including effects on water quality and coastal tourism. The company intends to pilot a small plot as part of the EIA process to obtain baseline data; however, the authorities are not prepared to grant permission before completion of the full EIA procedure, as this would be contrary to established procedures.

1.5. Renewable energy

Compared to 2024, developments in offshore wind energy have become more pessimistic. In 2025, reverse auctions for offshore wind capacity of up to 2 TWh per year were expected from the state; however, no auctions were launched and no new support measure has been proposed to date. Both Latvia's National Energy and Climate Plan 2021-2030[4] and

[3] Marine spatial plan of Hiiu County, Artes Terrae, 2016

[4] https://commission.europa.eu/document/download/3e07cbed-22c0-4b69-a8e5-887e0c6aa09e_en?filename=LV_FINAL%20UPDATED%20NECP%202021-2030%20%28English%29_0.pdf

Estonia's Energy Sector Development Plan until 2035[5] foresee 2035 as the initial year for offshore wind farms to enter the market.

Two offshore wind farms have obtained superficies licences: Saare Wind Energy (15 May 2025) and Utilitas Wind OÜ for the Saare-Liivi offshore wind farm (28 January 2026). Nevertheless, this represents only the first stage of development. In order to take final investment decisions, developers require state support, which the government is currently not prepared to provide.

Several superficies licence procedures have been initiated and EIA programmes prepared, yet studies have been suspended in certain cases. By secondary information this applies, for example, to Estonia Offshore Wind DevCo OÜ (formerly Ignitis Renewables OÜ) for the planned Liivi 1 and 2 offshore wind farm northwest of Ruhnu Island, as well as to the offshore wind project west of Saaremaa by Tuule Energy OÜ. Enefit Green OÜ has requested an extension of the deadline for submitting the EIA programme for compliance review for the Liivi Bay wind farm joint area (areas 1 and 2). The EIA report for the Liivi Bay offshore wind farm, which was expected to be disclosed in spring 2025, has still not been published. Altogether, these developments raise questions regarding the realisation of the projects in the foreseeable future.

Initial EIA procedures also indicate that, by the end of the assessment process, only part of the originally applied superficies licence area may remain suitable for development. This suggests that the wind energy areas designated in maritime spatial plans are oversized. For example, in the case of the Utilitas Wind Saare-Liivi offshore wind farm, only part of the initially applied area is likely to remain feasible (figure 4).

An additional development area, Saare 1 (developer Oxan Energy OÜ), was initiated for superficies licence proceedings with EIA by the Consumer Protection and Technical Regulatory Authority (CPTRA) in 17 June 2025. The Saare 1 area is located approximately 55 km west of Saaremaa, within the wind energy innovation area designated in the Estonian maritime spatial plan. Servicing such a wind farm would be feasible only on the basis of a Service Operation Vessel (SOV) model; therefore, it would not create new opportunities for small harbours. Instead, Ventspils port could benefit.

Consequently, the scenarios (2033, 2033+ and 2033++) developed in the harbours analysis already require revision. At present, only the Saare-Liivi and Saare Wind Energy offshore wind farms can be considered potentially realisable by 2033, creating opportunities respectively for Pärnu and West Saaremaa or for Ventspils. The most significant change is the suspension of the Liivi 1 and 2 offshore wind projects in the Gulf of Riga, which removes the opportunity for the harbours of Roja, Mērsrags, Skulte, Virtsu, Roomassaare and Mõntu

[5] https://kliimaministeerium.ee/sites/default/files/documents/2026-01/ENMAK%202035_1.pdf

to compete as service harbours. The realisation or non-realisation of other projects would have a considerably smaller impact on harbours development prospects.

The updated status of offshore wind farm developments is presented in Figure 5.

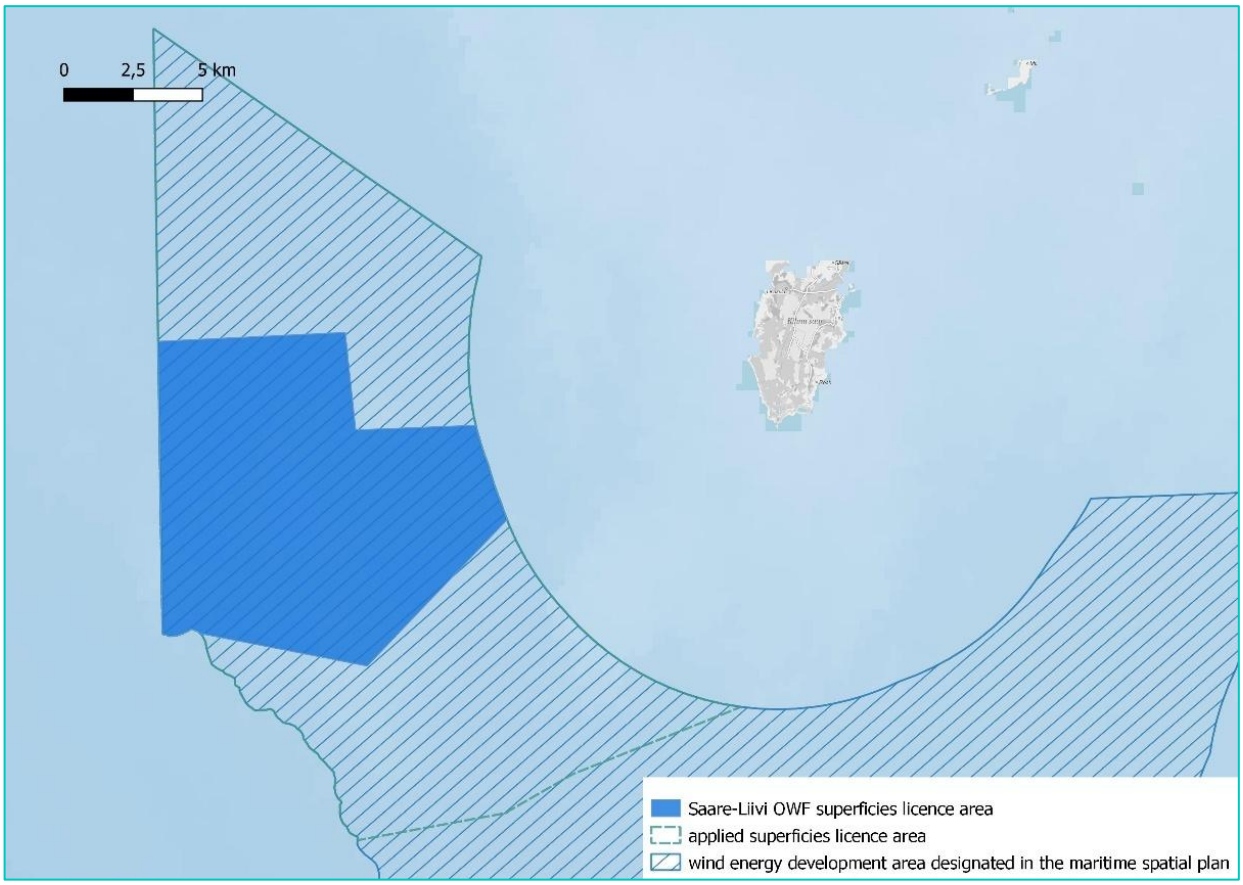

FIGURE 4. REDUCTION OF THE OFFSHORE WIND FARM AREA, BASED ON THE EXAMPLE OF THE SAARE-LIIVI OFFSHORE WIND FARM.

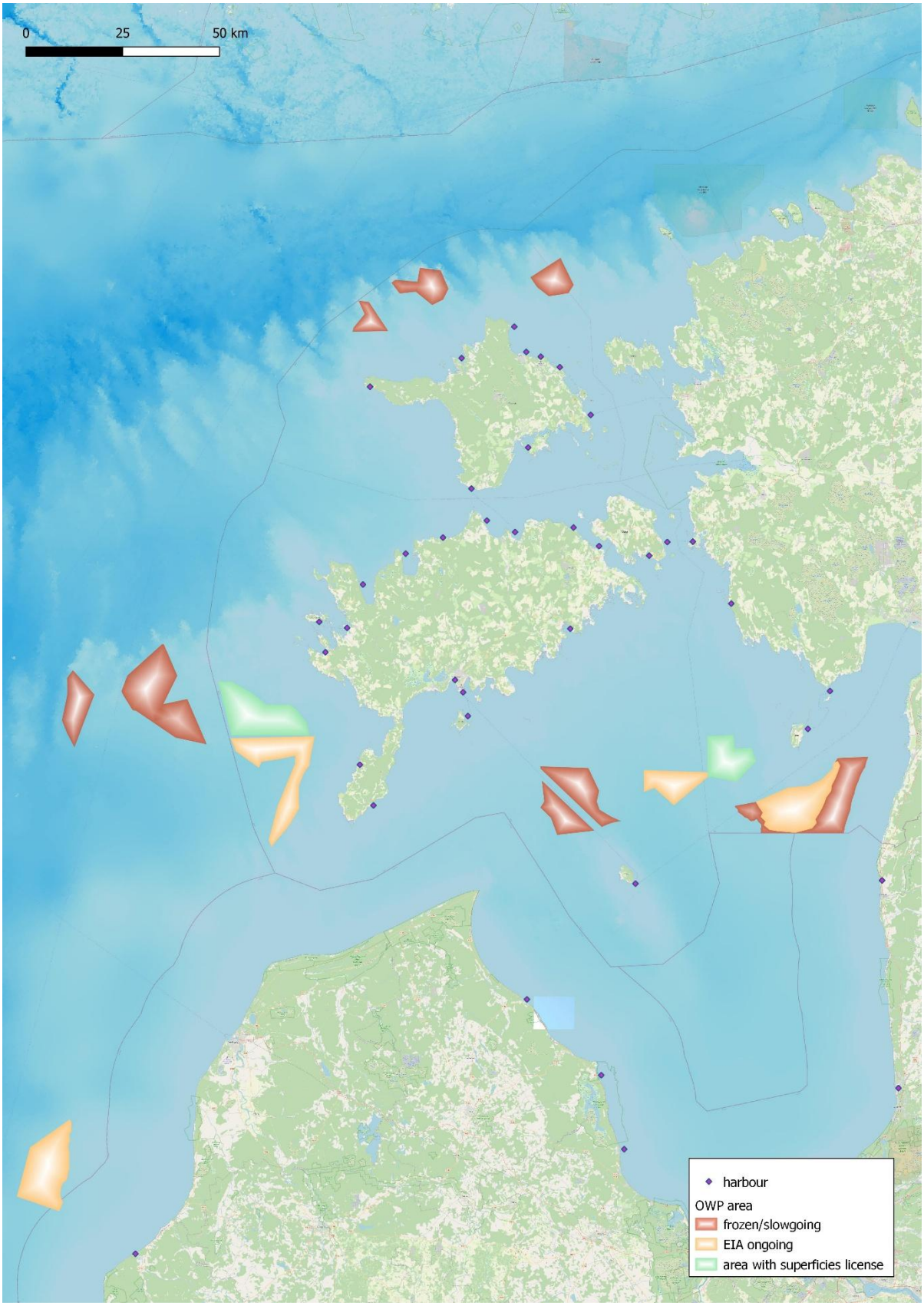

FIGURE 5. THE UPDATED STATUS OF OFFSHORE WIND FARM DEVELOPMENTS

At the same time, the development of onshore wind farms in Estonia has slowed down significantly due to both community opposition and biodiversity protection constraints. Over the past two years, only two onshore wind farm plans, with a total capacity of 223 MW[6], have been approved, while the Estonian Energy Sector Development Plan[7] sets a target of 1300 - 1800 MW of onshore wind capacity by 2035.

As a result, both developers and biodiversity experts have increasingly pointed out that offshore wind farms could be considered a realistic alternative to onshore wind. For example, this perspective was highlighted at the conference "*Mutual Impacts of Onshore Wind Farms and Biodiversity*" held in Tartu from 16 - 17 March 2026[8]. Offshore projects already hold superficies licences and have undergone Environmental Impact Assessment (EIA) procedures demonstrating that their construction is feasible without significant environmental impact.

In the case study[9] of the European Spatial Planning Observation Network (ESPON), it is also highlighted that, so far, the prevailing assumption has been that offshore wind is considerably more expensive than onshore wind. However, one 1500 MW offshore wind farm is roughly equivalent to 25 average onshore wind farms (with 10 -12 turbines each). It has not been systematically assessed whether constructing 25 separate onshore wind farms would ultimately be more socially feasible - considering cumulative environmental and social impacts, than developing a single offshore project. In addition, offshore wind farms would contribute to diversifying and decentralising renewable energy production.

As Connie Hedegaard, former EU Commissioner for Climate Action (2010 - 2014), has noted[10], societal acceptance is rarely achieved through the cheapest technological option. Offshore wind, although more expensive, may generate fewer local conflicts than onshore projects, particularly in visually or ecologically sensitive areas. Achieving acceptance therefore requires a willingness to balance cost efficiency with societal preferences.

At present, there is insufficient evidence on the full life-cycle, spatial and socio-economic impacts of different renewable energy technologies. Comparative assessments, such as offshore wind versus multiple onshore wind farms, are essential for making informed and socially acceptable investment decisions[11].

[6] https://keskkonnaportaal.ee/et/tuuleenergeetika-voimsus-eestis
[7] https://kliimaministeerium.ee/sites/default/files/documents/2026-01/ENMAK%202035_1.pdf
[8] https://www.youtube.com/watch?v=G30eltuyusI
[9] ESPON, 2025. Making space for the renewable energy transition. MAK-RES. Case studies.
[10] ESPON, 2025. Making space for the renewable energy transition. MAK-RES. Final Report.
[11] ESPON, 2025. Making space for the renewable energy transition. MAK-RES. Final Report.

1.6. New developments

Commissioned by the Ministry of Climate, the concept "Testing Areas for New Sustainable Technologies in Estonian Marine Areas" (Consultare, 2025) has been prepared. According to the concept, the network of marine test areas could be divided into three types:

- Spatially undefined pop-up test areas;
- Spatially defined test areas;
- Existing national defence special areas.

No spatially defined test areas are proposed in the concept for the marine areas of Saaremaa and Hiiumaa. Practically the entire Estonian marine area is designated as a pop-up test area (Figure 6).

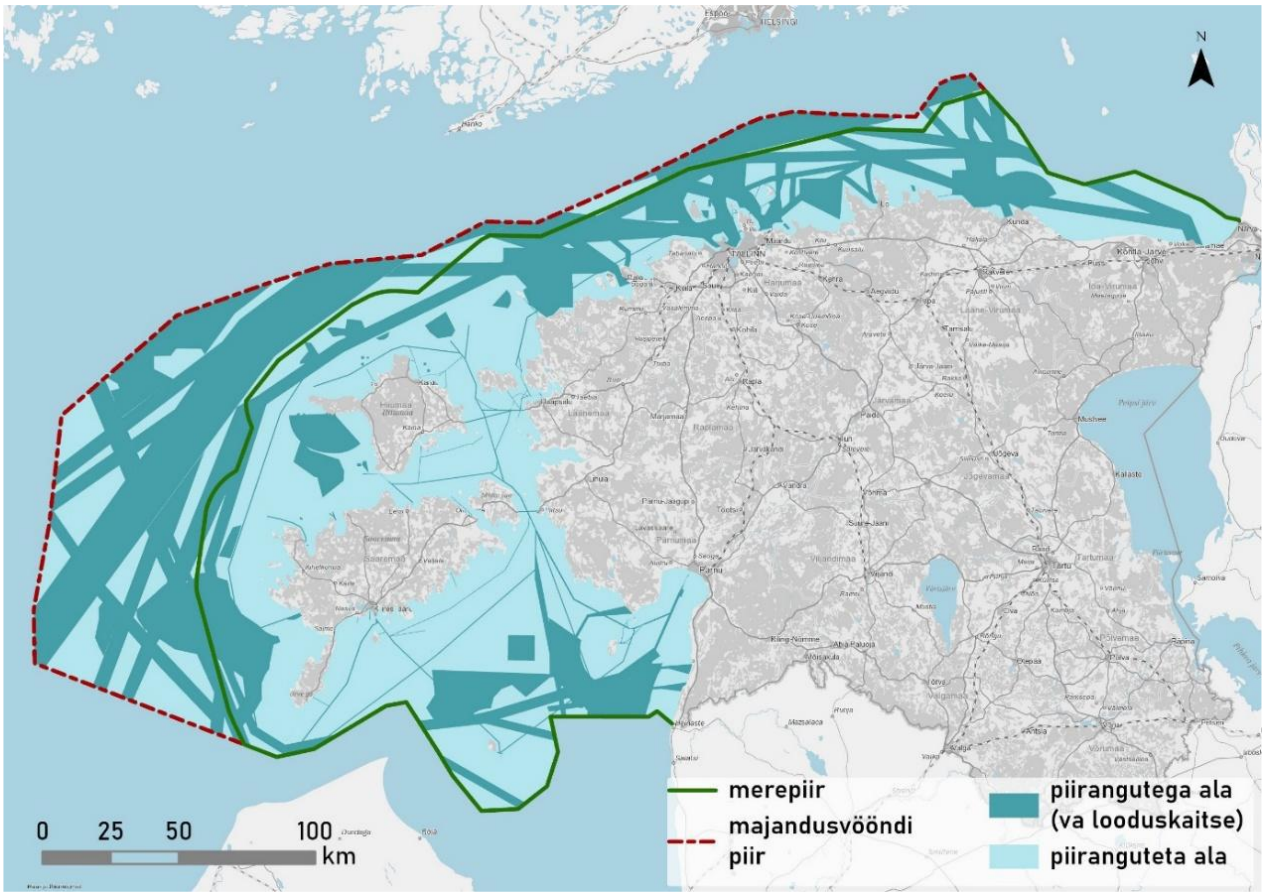

FIGURE 6. POP-UP TEST AREA (FIGURE: CONSLUTARE OÜ, 2025).

Within this pop-up test area, potential test areas for large autonomous vessels in the Gulf of Riga have been identified as a recommended preliminary selection (Figure 7). These are largely associated with the harbour of Nasva, where shipbuilding activities take place.

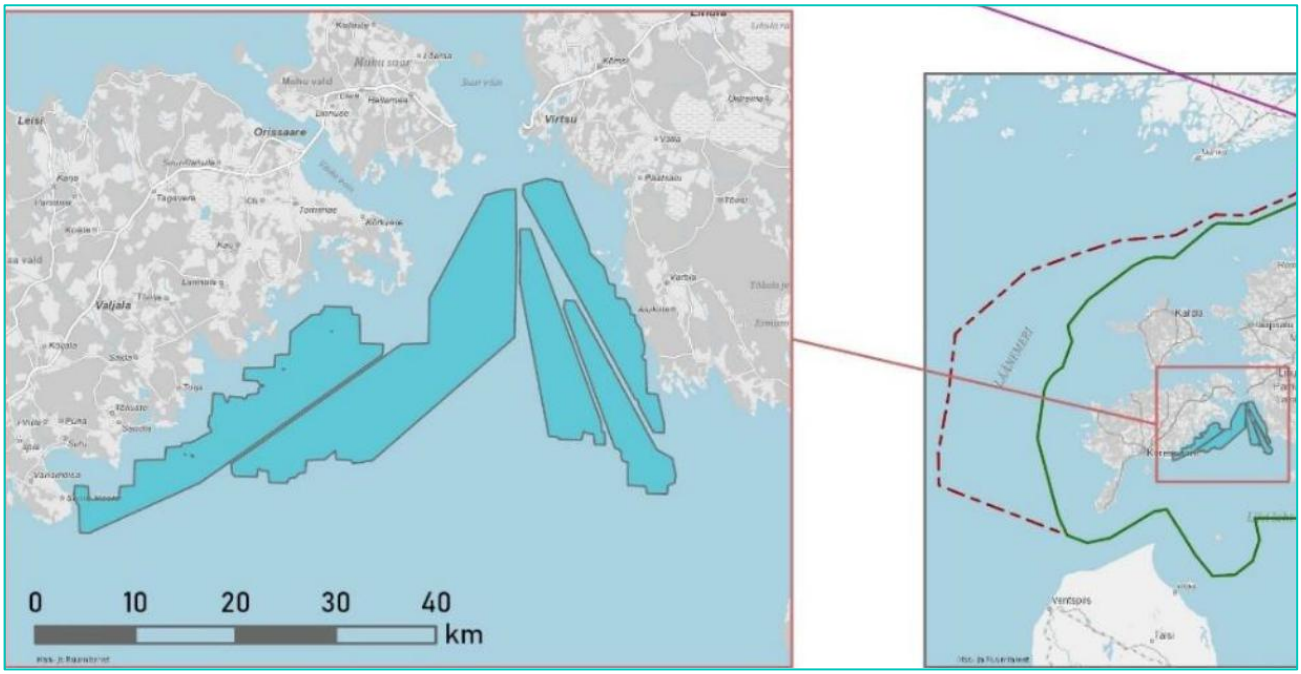

FIGURE 7. POTENTIAL TEST AREAS FOR LARGE AUTONOMOUS VESSELS IN THE GULF OF RIGA (FIGURE: CONSLUTARE OÜ, 2025).

During the preparation of the concept, the needs of entities conducting maritime testing were also examined. The most important factors identified were proximity to a port, communication connections, and access to support infrastructure. Although it is emphasised that infrastructure needs depend on the type of testing, a minimum baseline should be ensured to enable safe and efficient operations. Users consider the following requirements to be the most important:

- Proximity to a harbour (slipway, berth, storage facilities, lifting capacity);
- Reliable communications: mobile network and internet (including the need for 5G or cable connections);
- Meteorological and marine data (real-time access);
- Electricity connection (at sea primarily for monitoring platforms rather than the entire area);
- Support vessel or maintenance boats;
- Monitoring and measurement technology;
- Temporary work or storage areas, including the possibility of field offices or containers if needed;
- Safety and controlled area (ability to restrict access and provide surveillance if necessary).

Thus, if the marine test areas concept is implemented, it will create new functions for harbours.

2. MONITORING AND EVALUATION SCHEDULE

Changes in traditional sectors: maritime transport, fisheries and maritime tourism, are relatively slow and do not require continuous monitooring, a 3 - 5 years interval is sufficient. In contrast, in emerging blue economy sectors such as renewable energy and aquaculture, new developments may occur every year, making annual monitoring essential. It is also important to follow strategic documents and participate in their preparation.

TABLE 3. MONITORING SCHEDULE

Indicator	Strategic importance	Data collection schedule	Data source
Maritime transport	**Medium**	3-5 years	**Ministry of Transport/Port authorities (Latvia); Port authorities (Estonia)**
Fishing	**Medium**	3-5 years	**Ministry of Agriculture (Latvia); Ministry of Agriculture (Estonia)**
Tourism	**Medium**	3-5 years	**Central Statistical Bureau (Latvia); Transport Administration (Estonia)**
Marine renewable energy	**High**	1 year	**Ministry of Climate and Energy / Ministry of Economics (Latvia); CPTRA (Estonia)**
Aquaculture	**Medium**	1 year	**Ministry of Agriculture (Latvia); CPTRA (Estonia)**
New developments	**High**	1 year	**Ministry of Smart administration and Regional Development / Ministry of Climate and Energy (Latvia); Ministry of Climate /CPTRA (Estonia)**
Strategic documents (marine spatial plan, thematic action plans etc)	**High**	1 year	**Ministry of Smart administration and Regional Development / Ministry of Climate and Energy /Ministry of Agriculture (Latvia); Ministry of Climate / Ministry of Economic Affairs and Communications (Estonia)**

3. MONITORING FINDINGS

Data availability and comparability. Developments in traditional maritime sectors remain relatively stable, while emerging sectors show rapid change. A key challenge is the limited availability and comparability of data, particularly for small harbours, due to differing methodologies and incomplete datasets.

Harbour readiness as a bottleneck. In aquaculture, the main constraint is not the availability of suitable marine areas, but the readiness of harbours to service operations. In Hiiumaa, insufficient harbour capacity may hinder planned developments, highlighting uncertainties related to required depth and infrastructure.

Mismatch between planning and investments. There is a structural mismatch between marine spatial planning and harbour investment capacity. While marine areas are state-managed, harbours are largely municipal or private. Current funding schemes do not sufficiently support harbour development linked to new maritime uses, such as aquaculture.

Renewable energy development and uncertainty. Offshore wind development has progressed more slowly than expected due to the lack of state support, delays in EIA processes and suspension of several projects. At the same time, the slowdown of onshore wind development has increased the strategic importance of offshore wind.

Implications for harbours and energy planning. The uncertain realisation of offshore wind projects limits development opportunities for harbours, particularly smaller ones, as more distant projects rely on SOV-based solutions. At the same time, offshore wind may offer advantages in terms of lower social conflict compared to onshore developments, despite higher costs.

Need for comparative and integrated approach. There is insufficient evidence on the full life-cycle, spatial and socio-economic impacts of renewable energy technologies. More integrated and comparative assessments are needed to support informed decisions and better align marine planning, harbour development and sectoral policies.

Need for integrated planning approach. Overall, the monitoring results emphasise the need for a more integrated approach to maritime and coastal development, where marine planning, harbour development and sectoral policies are better aligned.

4. PROPOSALS FOR THE PROCESS OF UPDATING THE ESTONIAN–LATVIAN JOINT STRATEGY

For the Estonian - Latvian joint strategy to remain effective, it is essential to keep it up to date and to carry out regular monitoring. One possible approach is to establish a cooperation agreement or memorandum of understanding between the project partners (the municipalities of Hiiumaa, Saaremaa and Talsi). This would support continuous information exchange, enable the identification of new strategic priorities when needed, and facilitate the sharing of relevant information for harbour-related investments, as well as allow partners to allocate resources as needed and where possible.

In addition, a structured cooperation framework would help ensure consistency in data collection and improve the comparability of results over time. It would also strengthen cross-border collaboration, allowing partners to respond more effectively to changes in the maritime sector and to better align local development plans with broader regional and European policy objectives.