



Report

The impact of the geopolitical situation on the largest Baltic Ports in 2024

February 2025

port 
monitor

Total cargo turnover in the Top 10 Baltic ports

The volatile geopolitical situation in Europe, the ongoing war in Ukraine, stricter EU and international regulations, and the increasing demand for investment in innovation and sustainability are all challenging competitiveness and profitability in the current market environment. The maritime industry in the Baltic Sea also adapted to changes in global supply chains, with a focus on enhancing infrastructure and capacity.

In 2024, cargo handling in the ten largest Baltic ports **increased** by **3.5% (+16.9 million tonnes)** compared to the previous year, reaching **506.4 million tonnes** (Table 1).

The **Port of Ust-Luga** remained on its first position among the Baltic ports, **increasing** its turnover by **20%** reaching the level of **135 million tonnes** handled in 2024, while a year before it handled 112.5 million tonnes. This growth was primarily driven by an increase in dry cargo handling, especially fertilizers. The port has invested in new equipment (including reach stackers and inclined spreaders), which has helped boost volume. It was the biggest increase in the throughput among the Top Baltic Ports. In the other Russian ports smaller changes were noted in the total turnover. The **Port of Primorsk decreased** its volume by **3.8%** to the level of **60.7 million tonnes**, while the **Port of Sankt Peterburg increased** by **4.8%** (to the level of **52 million tonnes**). Overall, in 2024 all Russian seaports noted a 2.3% decrease in cargo turnover, especially in the category of coal, metals and liquid cargo, however the cargo turnover of the Baltic basin slightly increased (+0.6%).

In 2024, all major Polish seaports experienced a decline in total turnover. Despite this, the **Port of Gdańsk** maintained its second position in the ranking of the largest Baltic ports. Last year, the port **handled 77.4 million tonnes** of cargo, a **decrease of 4.4%** compared to the previous year. The decline in handled goods was primarily due to a reduced volume of coal and coke (-41.3%), grains (-6.6%), and other dry bulk (-1.8%). Increases were noted in liquid fuel and general cargo category. In 2024, liquid fuels remained the dominant cargo group at the Port of Gdańsk, accounting for 51% of the total turnover.

The **Port of Gdynia** and the **Port of Szczecin-Świnoujście** also noted a **decrease** in the total turnover by **8.5%** and **8.4%** respectively. In the Port of Gdynia, nearly 27 million tonnes were handled (-2.5 million tonnes). The main factor contributing to the decline in total turnover was the reduced handling of coal and coke, which dropped by 60% compared to the previous year. A reduction was also driven by lower grain turnover – the largest grain-handling port in the Baltic region recorded a 17.24% decrease, handling 1.16 million tonnes less than in 2023. The only category that saw an increase was general cargo (+6.29%). The Port of Szczecin-Świnoujście recorded the second-largest percentage drop in total cargo volume among Polish ports. Timber was the only category that increased (+135.78%), while general cargo remained nearly unchanged from 2023 (+0.03%). The most significant impact on the port's performance came from reduced bulk cargo handling, with the largest declines recorded in coal (-48.06%) and ore (-22.98%).

The **Port of Gothenburg** maintained its fifth position in the ranking of the top Baltic ports. In 2024, Sweden's largest port handled **6% more** cargo than the previous year, surpassing **38 million tonnes**. It was noted that imports increased last year, and a trend is expected to continue in 2025, while exports

saw a slight decline. The higher volume in 2024 was primarily driven by increased handling of energy products (+18%) and dry bulk (+6%).

Last year, The **Port of Klaipėda** overtook the Polish port – Szczecin-Świnoujście, handling **35.5 million tonnes** in 2024 - an **8.7% increase** (+2.8 million tonnes) in total turnover. Lithuania's largest port recorded the highest growth due to a more than twofold increase in the throughput of building materials and minerals compared to 2023. These results were driven by the Port Authority's continuous infrastructure investments, as well as companies' decisive efforts to modernize equipment and maintain strong client relationships. Last year, liquefied natural gas (LNG) shipments at the port totaled 319,000 tonnes, a 14% decrease. Analyzing cargo handling by quarter, the second half of 2024 was the most successful for the Port of Klaipėda.

Another port that experienced a decline in total turnover in 2024 was the **Port of Rostock**. Last year, the German port handled **30.1 million tonnes**, marking a **2.6% year-on-year decrease**. This result was partially caused by reduced dry bulk handling – primarily coal, cement, and fertilizer – which dropped by 11.4%. Despite this decline, 2024 was the port's second-best year on record in terms of cargo handling. Nearly €18 million was invested in the Overseas Port's infrastructure. At the end of 2024, a contract was awarded for the reconstruction of berths 33 and 34. The project will modernize the last two 1960s-era berths on pier 2's east side, covering 400 meters. With a 12.5m draught and 5t/m² load capacity, they will match berths 31 and 32. The two-year construction is co-funded by Mecklenburg-Vorpommern and the federal government.

2024 was also a challenging year for the **Port of Riga**, which handled just over **18 million tonnes**, a **3.9% decrease** compared to 2023. This decline was primarily due to reduced dry bulk cargo handling (-11.6%), particularly coal and coke (-87%) and ore (-76%). On the other hand, general cargo (+4.8%) and liquid cargo (+10.4%) saw an increase.

Table 1. The volume of cargo handled in the Top 10 Baltic ports in 2022-2024 [thou. tonnes]

No.	Port	2022	2023	2024	Change 2024/2023
1.	Ust-Luga	124 100	112 500	135 000	20.00%
2.	Gdańsk	68 220	80 957	77 391	-4.40%
3.	Primorsk	57 100	63 100	60 700	-3.80%
4.	St. Petersburg	38 800	49 600	52 000	4.84%
5.	Gothenburg	40 492	36 300	38 396	5.77%
6.	Klaipėda	36 100	32 668	35 500	8.67%
7.	Szczecin-Świnoujście	36 810	35 323	32 362	-8.38%
8.	Rostock	28 975	30 900	30 100	-2.59%
9.	Gdynia	28 190	29 399	26 896	-8.52%
10.	Riga	23 500	18 794	18 063	-3.89%
Total		482 287	489 541	506 408	3.45%

Source: Actia Forum based on ports' data

Container Turnover in the Top 10 Baltic Container Ports

In 2024, the Baltic Sea's container market experienced notable developments, with significant growth in key ports and shifts in regional dynamics. The Top Baltic container ports handled over **9 million TEUs**, marking a **7.8% increase** compared to the results achieved in 2023 -Table 2. This result is higher by 648,623 TEUs comparable to the record result after the Covid times in 2021, where the economy had recovered. Most of the top ports improved their results in 2024.

The largest container port in the Baltic Sea region is the **Port of Gdańsk**. In 2024, the port achieved another **record** in container handling, reaching **2,248,764 TEUs**, an **increase of 9.7%** (+198,727 TEUs). The port is investing in a new container terminal, T3, within the Baltic Hub, which is expected to enhance its capabilities and increase its annual capacity to up to 4.5 million TEUs. The first four Ship-to-Shore cranes have safely arrived and were unloaded at the main T3 quay last year. Testing and assembly of the necessary equipment are currently underway, with full operational readiness expected by March 2025.

The **Port of Gdynia** significantly **improved** its container turnover in 2024, reaching **974,586 TEUs** (**+11.5%** or +100,000 TEUs) compared to 2023, securing fourth place among the top container ports. The largest increase was recorded by the GCT terminal (+16.2%), attributed to the launch of the new Poland Express Service (Ipex) to the UK by the shipping company Ellerman City Liners. The neighboring BCT terminal also experienced strong growth (+8.5%). Plans are underway for a new deep-water Outer Port, planned to be an area of approximately 151 hectares. The project includes a container terminal with a yearly throughput capacity of 2.5 million TEUs and deep-water quays totaling around 2.5 km, designed to accommodate the largest vessels entering the Baltic Sea.

The second-largest container port in the Baltic Sea in 2024 was the **Port of St. Petersburg**. Last year the container turnover **increased** in this port by **31.3%** compared to 2023, allowing it to overtake the Lithuanian port, ranked second in 2023. The Russian port handled **1,374,000 TEUs** (+327,512 TEUs). Last year highlighted the growing importance of and recovering demand for container flow in Russia. The main factor behind this growth was the service provided by Chinese shipping companies and MSC, while many European shipping lines withdrew from the Russian market after the invasion of Ukraine. This trend may continue, depending on geopolitical dynamics and global trade policies.

The **Port of Klaipeda** ended 2024 with a **1.8% increase** in container turnover compared to 2023. Despite the growth, the port dropped one position in the ranking. In 2024, Klaipeda handled over 1 million TEUs for the third time in its history, reaching **1,069,678 TEUs** (+18,874 TEUs). Container handling ranked second in terms of tonnage growth last year, with an increase of 859,000 tonnes, or 9% more than in 2023. In total, just over 10 million tonnes of containerized cargoes were handled, accounting for 28% of the port's total cargo volume.

Container handling at the **Port of Gothenburg** in 2024 remained at a similar level to 2023, totaling **909,000 TEUs** (**-0.6%** or -5,000 TEUs). Despite this slight decline, the tonnage of containerized cargo increased, indicating a reduction in the number of empty containers passing through the port. This improvement enhances efficiency, reduces environmental impact, and lowers supply chain costs. The number of containers transported to and from the port by rail increased by 7% in 2024, marking the second year in history in which more than 500,000 TEUs were moved by rail.

At the **Port of Aarhus**, the decline in container handling continued. In 2024, the port handled **659,886 TEUs, a 2% year-on-year decrease**. Denmark's largest port accounts for over 70% of the country's container market. In September 2024, the Port of Aarhus signed an agreement with global shipping company MSC to lease a land for the new container terminal. Terminal Investment Limited (TiL), MSC Group's terminal operator, will develop the Omniterminal, with full completion expected by 2027. Additionally, at the start of 2025, the Port of Aarhus joined the Zero Emission Port Alliance, which promotes sustainable container handling practices.

Table 2. Container turnover in the Top 10 Baltic container ports in 2022-2024 [TEUs]

No.	Port	2022	2023	2024	Change 2024/2023
1.	Gdańsk	2 072 122	2 050 037	2 248 764	9.69%
2.	St. Petersburg	925 196	1 046 488	1 374 000	31.30%
3.	Klaipėda	1 047 941	1 050 804	1 069 678	1.80%
4.	Gdynia	914 448	873 892	974 586	11.52%
5.	Gothenburg	884 900	914 000	909 000	-0.55%
6.	Aarhus	759 000	673 781	659 886	-2.06%
7.	Hamina-Kotka	629 332	617 181	571 097	-7.47%
8.	Riga	460 689	465 391	501 851	7.83%
9.	Helsinki	491 793	451 760	444 000	-1.72%
10.	Tallinn	267 752	221 405	261 822	18.25%
Total		8452 952	8 368 085	9 016 708	7.75%

Source: Actia Forum based on the ports' data

A decline in container turnover was also recorded at the Finnish ports of **Hamina-Kotka** and **Helsinki**, where **7.5% and 1.7% fewer** containers were handled in 2024 than in 2023, respectively. Finland's largest container port handled over **571,000 TEUs**, while the second-largest – **444,000 TEUs**. The Port of Hamina-Kotka also experienced a decline in total cargo turnover across most cargo categories (both exports and imports), as well as in containerized cargo, in 2024 compared to 2023. The Port of Helsinki, despite handling fewer TEUs, noticed increased tonnage of containerized cargo by 0.7%.

Container throughput at the **Port of Riga increased by 7.8%**, reaching **501,851 TEUs**. The Latvian port achieved a significant milestone by handling over 5 million tonnes of containerized cargo and surpassing the half-million TEU mark for the first time in its history. The Port of Riga remains Latvia's sole provider of regular container traffic. In 2024, two new container shipping operators added Riga to their routes, followed by another in early 2025. Currently, the port is served by eight major container lines: CMA CGM, MSC, Penta Maritime Agencies (as agent for COSCO), Sea Consortium, Unifeeder, Samskip, Reel Shipping, and Ocean Network Express (ONE). In September 2024, the first so-called "green cargo transportation route" (Riga-Rotterdam-Antwerp Bruges-Klaipėda-Riga-Rotterdam) was inaugurated, using container ships powered exclusively by green methanol. These developments highlight the Port of Riga's strategic efforts to strengthen its position in the Baltic container market, focusing on diversifying cargo types and expanding international partnerships.

In 2024, the **Port of Tallinn** returned to the Baltic Top 10 container ports list, with container throughput **growing by** an impressive **18.3% year-on-year**, reaching **261,822 TEUs**. The total tonnage of containerized cargo also increased by 12.3%, up to 2.11 million tonnes. The second half of 2024 saw significant growth in container turnover, which was the primary driver of this increase. In July, the Eco Maestro, a container vessel powered by green methanol, arrived at the Estonian port for the first time, operating on the Green Finland X-PRESS (GFX) route. This route starts in Rotterdam, passes through Antwerp, Kotka, and Helsinki (Vuosaari), before docking at Muuga Harbour and returning to Rotterdam. Shifts in regional trade routes due to geopolitical tensions and supply chain disruptions may have contributed to increased container traffic at the Port of Tallinn.

Ro-Ro and ferry market in 2024

In 2024, the Baltic Sea's ro-ro market exhibited mixed performance across various ports, influenced by economic conditions, infrastructure developments, and geopolitical events. The available throughput statistics from several key Baltic ro-ro ports are presented in Table 3. Despite challenging times, most of the eleven ports analyzed experienced an increase in freight units handled in 2024 compared to the previous year.

The largest Ro-Ro port in the area of the Baltic Sea is the **Port of Trelleborg**. In 2024, the port handled **750,037 freight units**, representing a **6.3% decline** compared to 2023. There are many expansions and ongoing investments in the Port of Trelleborg. The "Green FIT 2025" project includes works implemented during 2021-2024. The port builds two new large berths for next-generation Ro-Pax vessels and installs shore-side electricity connections. Enercon has installed two 120-meter-high wind turbines, while Skanska has completed the side ramp, which is now operational. The side ramp at the ferry berth No.13, approximately 100 meters long with two lanes, consists of four parts weighing a total of 200 tonnes. Work is also in progress on extending the reverse track to the intermodal terminal. The Port of Trelleborg has seen a very strong increase in intermodal rail traffic in recent years and volumes continue to increase.

In 2024, the **Port of Helsinki** handled **671,645 freight units**, marking a **4.4% increase** compared to 2023. Cargo traffic rose as anticipated during the summer and early autumn, reinforcing Helsinki's strong position in lorry and trailer traffic. Logistics operators value the port's prime location for imports and its flexible solutions for both container and ro-ro traffic in export flows. Although travel seasons were busy in 2024, a slump in domestic housing construction led to lower commuter traffic between Helsinki and Tallinn. Additionally, fluctuating fuel prices, VAT increases in both Estonia and Finland, and a 100% increase in Finnish fairway charges starting in 2025 are expected to put pressure on shipping companies.

The **Port of Tallinn** also saw a positive trend in Ro-Ro throughput in 2024, handling approximately **565,000 freight units** (6.6 million tonnes), reflecting a **2.6% increase** compared to 2023. Vessel calls and passenger numbers also rose, with the Tallinn-Helsinki route remaining the most popular, experiencing 3.3% passenger growth. Future growth in this sector may be supported by EU funding through the Twin Port VI project. This four-year initiative focuses on reducing the environmental impacts of shipping between Estonia and Finland while enhancing transportation opportunities. According to this project, the Port of Tallinn will build shore power connections at Muuga Harbour for ro-ro and container ships, while the Port of Helsinki will advance developments at Vuosaari Harbour.

The weakened European economy continued to impact ro-ro volumes at several ports, including the **Port of Gothenburg**, where total Ro-Ro traffic **declined by 3%** to **524,000 freight units** in 2024. The handling of cars also declined by 4%, in line with a decrease in new car registrations in Sweden. However, Gothenburg Ro-Ro Terminal, the port's largest facility with routes to key hubs in Belgium and the UK, recorded an increase in volume.

Germany's largest Baltic port, the **Port of Rostock**, handled **517,000 freight units** in 2024, reflecting a **slight increase of 0.2%** compared to 2023. The handling of rolling cargo, ferry and Ro-Ro goods, remained at the previous year's high level of 16.5 million tonnes. The import and export of new vehicles saw significant growth, increasing from a total of 32,000 to over 122,000 units, largely driven by the Autolink terminal – a first German car terminal on the Baltic Sea. Another ongoing project in the port involves infrastructure upgrades on the south of Harbor Basin A. Last year, extensive demolition of old

hall complexes began on an area of around 10 hectares, with completion expected by 2026. The cleared space will support the expansion of the ferry and Ro-Ro terminal.

In 2024, the **Port of Hanko** handled **158,758 freight units**, representing a **6.3% decrease** compared to 2023. Despite this decline, total cargo throughput grew by 12.5%, with container traffic increasing by 2.9%.

Table 3. Ro-Ro cargo throughput in selected Baltic ports in 2023-2024 [freight units]

Port	2023	2024	Change 2024/2023
Trelleborg	800 117	750 037	-6.26%
Helsinki	643 629	671 645	4.35%
Tallinn*	551 000	565 192	2.58%
Gothenburg	540 000	524 000	-2.96%
Rostock	516 000	517 000	0.19%
Szczecin-Świnoujście	460 456	468 346	1.71%
Klaipeda	316 008	336 587	6.51%
Gdynia**	192 790	201 566	4.55%
Ystad	208 042	189 939	-8.70%
Hanko	169 462	158 758	-6.32%
Gdańsk	24 556	28 212	14.89%

Source: Actia Forum based on ports' data

**estimated data, based on the ro-ro throughput in million tonnes*

*** data on freight units for the Port of Gdynia are not comparable with the data presented in previous editions of the Port Monitors due to a different method of counting and presenting data by the Port of Gdynia in previous years. Currently, the data includes trucks and their trailers, semi-trailers, trailers in regular traffic to Karlskrona, Hanko and Södertälje.*

All **Polish ports** recorded growth in ro-ro throughput in 2024 compared to 2023, handling a combined total of **698,000 freight units (+2.99%)**. The largest Polish ro-ro port, **Szczecin-Świnoujście**, handled **468,346 freight units (+1.7% y/y)**. The **Port of Gdynia** followed with **201,566 freight units (+4.6%)**, while the **Port of Gdańsk** handled **28,212 freight units (+14.9%)**.

The Port of Gdańsk operates a regular ferry service to Nynäshamn (Polferries) and includes also other ro-ro traffic in its cargo statistics. In Gdynia, in addition to Stena Line and Finnlines' regular services to Karlskrona and Hanko, Lakeway Link (a joint venture between Wallenius and Greencarrier) launched a new service in May 2024, connecting Gdynia with Södertälje in Sweden. In the second quarter, Finnlines also introduced a new route from Świnoujście to Malmö. Additionally, in July 2024, Polferries introduced the new vessel Varsovia on the Ystad route. A significant development at the Świnoujście ferry terminal was the introduction of an intermodal service, allowing rail cars to be loaded onto the Polonia ferry (Unity Line) thanks to infrastructure improvements.

The **Port of Klaipeda** ended 2024 with **336,587 freight units** handled, a **6.5% increase** compared to 2023. Ro-ro cargo ranked third in terms of tonnage growth, reaching 6.1 million tonnes (+16% y/y), marking the second-highest handling result for this segment in the port's history. Passenger traffic also increased, with ferry travellers rising by 0.8% (370,700 passengers). To enhance sustainability, the Port of Klaipeda is launching a project to implement onshore power supply (OPS) technology for ro-ro vessels.

The €11 million project, partially funded by €8.6 million from the EU's CEF program, will see the installation of three ro-ro power stations at Klaipeda's Central Terminal and one at the Container Terminal. Work is set to begin immediately after contract signing, with completion scheduled for 2028.

The **Port of Ystad** handled **189,939 freight units** in 2024, an **8.7% decline** compared to 2023. One reason for the drop in ro-ro traffic was the railway yard reconstruction, which was completed in April 2024, allowing the first train ferry to operate. In July, a higher-capacity ferry was added to the Ystad-Świnoujście route. Despite these investments, freight unit throughput declined in the second half of 2024.

Outlook for 2025

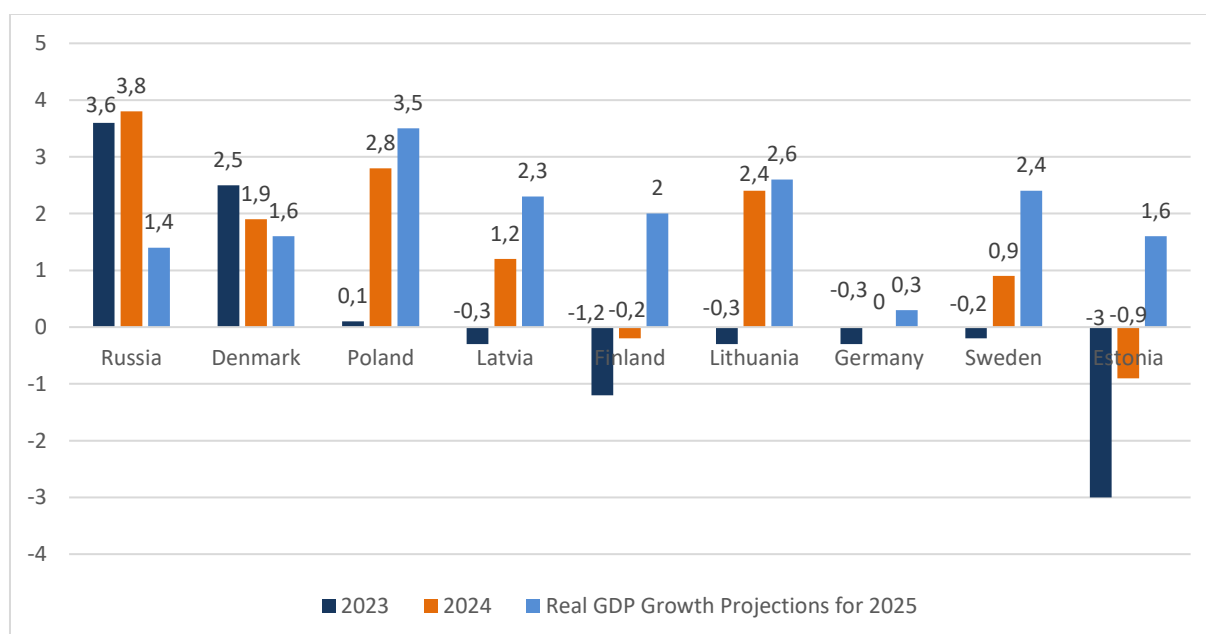
In 2025, the Baltic maritime industry may face geopolitical, environmental, and economic shifts. The Baltic countries have increased security to protect critical infrastructure and disconnected from Russia's Brell energy system, boosting energy independence. Stricter EU emissions regulations and declining fish stocks are driving sustainability efforts. Russia is expanding Baltic ports to increase agricultural exports, potentially altering trade flows. Global trade volatility adds uncertainty, but the region is focused on infrastructure improvements and adapting to evolving market demands.

In summary, while the Baltic maritime industry is poised for growth through infrastructure development and increased trade, it must concurrently address environmental sustainability and navigate geopolitical complexities to ensure long-term resilience and prosperity.

Many Baltic ports, such as the Port of Gdańsk or the Port of Klaipėda, have been investing in developing their areas, adapting to market demand and innovations. It is expected to help improve their annual throughput, encouraging other port operators to include them in their calling chains.

The year 2025 will continue to be shaped by geopolitical factors affecting the Baltic transport market and economy. The conflict in Ukraine and embargoes on raw materials such as LPG, oil, and coal may drive growth in bulk cargo handling at ports. Trade and energy disruptions caused by instability in the Middle East will impact the Baltic market. At the same time, increasing demand for alternative transport routes and diversified raw material sources could strengthen the logistics sector. Improved consumer sentiment at the end of 2024 and GDP growth forecasts offer prospects for a recovery in general cargo handling.

Figure 1. The GDP growth forecast for the analyzed Baltic countries in 2024 [%].



Source: Actia Forum based on World Economic Outlook, January 2025

Most of the Baltic countries can expect GDP growth in the coming year. In 2024, the Baltic countries experienced mixed economic performances. Estonia saw a slight growth of 0.5%, while Latvia's GDP

stagnated with a growth of 1%. Lithuania, however, had a stronger year with a 2.7% growth driven by exports in IT services and manufacturing. Looking ahead to 2025, Estonia and Latvia are expected to see modest growth, with projections of 1.6% and 2.3%, respectively, supported by rebounding exports and private consumption. Lithuania's economy is projected to grow by 2.6%, driven by external demand and favorable financing conditions.

In 2024 Russia's economy grew by 3.8% surpassing the previous forecast. However, inflation stood at 9.5%, prompting the central bank to maintain the benchmark interest rate at 21% to curb rising prices. Looking ahead, the International Monetary Fund (IMF) projects Russia's GDP growth to slow to 1.4% in 2025, with inflation expected to decrease to 7.0-8.0%.

In Denmark, the economy is projected to slow down and grow by 1.6% in 2025, driven by robust exports, particularly in the pharmaceutical and sea freight sectors. Private consumption is expected to recover gradually, supported by rising real household disposable incomes. The unemployment rate is projected to stabilize at 5.8%. Inflation is anticipated to average 1.3% in 2024, with a slight increase to 1.9% in 2025.

In recent years, Poland has experienced economic growth, and according to predictions, this trend may continue. In 2024, GDP growth was 2.8%, and the forecast for 2025 is 3.5%. This is the highest growth among the analyzed countries, indicating that economic growth is expected to rebound. Compared to the largest European economies and Russia, the Polish economy maintains a stable growth rate.

The forecast for the Scandinavian countries is quite optimistic. In 2025, GDP growth for Sweden is expected to be 2.4%, and for Finland 2%. The Swedish economy has underperformed in recent quarters, primarily due to stagnating domestic demand, although exports remained steady. Both households and businesses have faced rising interest burdens and high price increases, which have impacted spending and investment. Finland is making a slow recovery from recession. The economy is expected to contract by 0.5% in 2024. Uncertainty in the global economic outlook is slowing export growth, while the recovery in private consumption remains sluggish due to weak economic confidence and rising unemployment.

Germany, after a period of economic decline, is gradually seeing improvements, although growth remains moderate. The GDP growth in 2025 is expected to be 0.3%. According to Kiel Institute's winter forecast - there are currently no signs of a noticeable economic upturn. High uncertainty has been weighing on consumption and investment, and the trade outlook has worsened as global demand for industrial goods weakened.

These projections indicate mostly a positive trajectory for the Baltic economies in 2025, contingent upon global economic stability and effective domestic policies.

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The Port Monitor is a series of periodic reports regarding the seaports market in the Baltic Sea, as well as on the European and global scale. This reports has been prepared by the Consulting Department at the Actia Forum, specializing in the market analysis in transport, tourism and environment, as well as European projects and business counselling.

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