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Економіка

## PARAMETRIC FEATURES OF THE DEVELOPMENT OF THE WATER TRANSPORT SYSTEM OF UKRAINE

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Ukraine's transport system is a multifunctional and complex system in which maritime transport is an important element that ensures the sustainability and development of the country's economy, helping to increase the export opportunities of national enterprises.

Ukraine's seaports play a key role in the export of Ukrainian products. Before the war, 75% of Ukraine's foreign trade turnover was transported by sea. During the war, the sea route, the functioning of the port infrastructure and inland waterway transport also ensured food security in the world. In the national transportation system, sea transport is the leader in cargo exports.

In 2024, Ukraine's economy continued to recover despite the challenges of martial law. According to the Ministry of Economy of Ukraine, in the first nine months of 2024, Ukraine's GDP grew by 4.5% compared to the same period in 2023 [1]. This dynamic was positively influenced by the stable functioning of the Ukrainian sea corridor. At the same time, the revival of industry contributes to an increase in the volume of transportation work and cargo turnover of Ukrainian commercial seaports.

Russia's full-scale military aggression against Ukraine has changed the transportation system. Ukraine's transport system includes 18 sea trade ports, but due to the temporary occupation of the territory and military operations on the territory of Ukraine, 6 sea trade ports are operating as of the beginning of January 2025: Odesa Sea Port, Pivdenny Sea Port, and Chernomorsk Sea Port, and the Danube cluster sea ports - Reni Sea Trade Port, Izmail Sea Trade Port, and Ust-Dunaisk Sea Port.

In 2016, the annual cargo turnover of Ukrainian seaports reached 131,745.2 thousand tons, and in 2019, the cargo turnover of Ukrainian commercial seaports reached a record high of 160,001.21 thousand tons. In 2022, as a result of Russia's military aggression against Ukraine, the annual cargo turnover amounted to 51,185 thousand tons (Fig. 1). The main reasons for the decline in cargo turnover: from July 2022 to the present, six seaports have been operating as a result of the temporary occupation of the territory of Ukraine and hostilities; mining of the Black Sea; periodic shelling of the infrastructure of seaports by Russia, which leads to the destruction and/or damage to port assets, requiring significant investments to restore port and logistics infrastructure.

The waters of the Black and Azov Seas are mined, making it difficult to navigate and restore transport infrastructure. To make navigation in the Black Sea safer, in January 2024, an agreement was signed between Turkey, Bulgaria and Romania and the Black Sea Naval Mine Action Group was established to maintain security in the Black Sea by strengthening mine action capabilities. The group was created for three years with an automatic renewal period if none of the participating countries declares a desire to terminate the agreement [2].

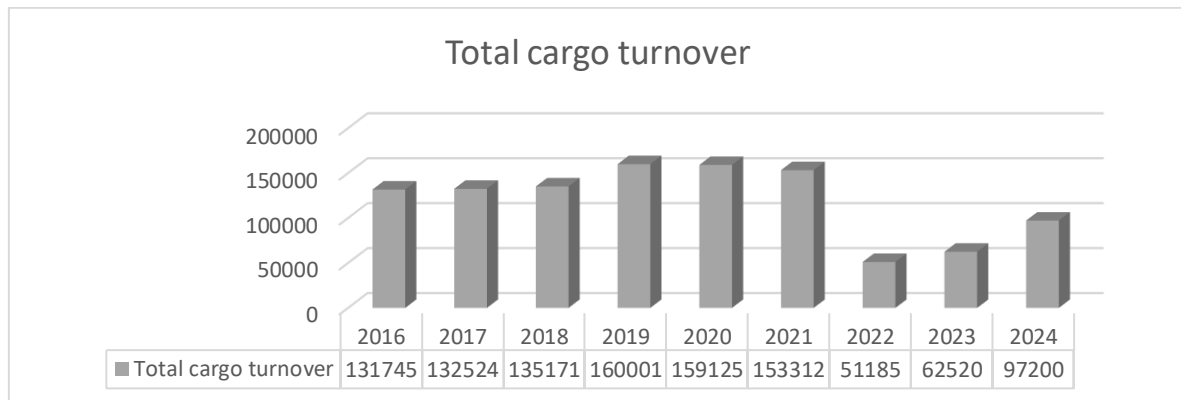


Fig. 1. Dynamics of total cargo turnover of Ukrainian seaports in 2016-2024, thousand tons

Source: from the Ports of Ukraine magazine (2016-2022); Ministry of communities, territories and infrastructure development of Ukraine (2023, 2024)

At the beginning of the war in Ukraine, the ports of the Danube cluster were the only way to ship cargo by sea. As you know, maritime and inland water transport is more economical, which reduces transportation costs.

In 2024, the cargo turnover of stevedoring operators of the ports of Greater Odesa (Odesa, Chernomorsk, Pivdenny) amounted to 79.9 million tons, which is 2.6 times more than in 2023 (30.62 million tons of cargo turnover in 2023).

The Danube River, after Russia's full-scale invasion of Ukraine, is a strategically important waterway in Ukraine, with full navigation and high traffic intensity. As for the Dnipro River, there are only a few voyages now and with the permission of the military administration. One of the main conditions for the resumption of navigation on the Dnipro River is to ensure safe passage of ships. The resumption of navigation on the Southern Bug River will be feasible when the port of Mykolaiv, which served as a transportation hub before the war, resumes operations. Unfortunately, it is currently impossible to use Mykolaiv district due to the proximity of military operations.

The ports of the Danube Cluster play a key role in the export of Ukrainian products. The seaports of Ust-Dunaisk, Reni, and IZMAIL are logistics hubs for the transportation of agricultural cargo by sea. In 2024, the cargo turnover of the seaport of IZMAIL was dominated by grain cargo, meal, sunflower and oil.

In 2024, 9061 vessels sailed through the Ukrainian Sea Corridor, of which 4651 vessels arrived in Ukraine and 4410 vessels went to other ports, allowing for the export of 74.4 million tons of cargo [3]. Most of the exported goods that passed through the Ukrainian sea corridor are agricultural products.

By early 2025, the French company SMA CGM plans to launch a new container route connecting the ports of Odesa, Piraeus, and Istanbul. Two container ships will serve the route, which will run weekly. The Turkish carrier Medkon Lines also plans to resume liner transportation in Ukrainian seaports [4].

It should be noted that UNCTAD forecasts that global container traffic will grow by 2.7 percent between 2025 and 2029. Growth forecasts are driven by trends in the global economy and some easing of unfavorable economic factors, such as inflation. Currently, there is an increase in global cargo transportation by sea. In 2023, the global volume of sea freight reached 12,292 million tons, an increase of 2.4 percent over the year. The growth is attributed to the recovery of the global economy, as well as an increase in demand caused by the redirection of ships [5].

To ensure the competitiveness of water transport enterprises in Ukraine, it is important to introduce flexible management models that take into account the challenges of martial law, current operating conditions and economic risks.

Investment decision-making in the activities of water transport enterprises requires taking into account the balance of supply and demand in the global maritime trade market.

Improving the efficiency of managing the competitive sustainability of national maritime transport enterprises requires an integrated approach and active participation of all participants in the transportation process.

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