

ASSESSMENT OF THE STATE OF TRANSPORT LOGISTICS IN UKRAINE UNDER MARTIAL LAW

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Анотація

Мета статті полягає в аналізі сучасного стану логістичної системи на ринку України. Аналізуючи статистичні дані дослідити сучасний стан транспортної логістики на вітчизняному ринку.

Ключові слова: вантажні перевезення, логістика, вантажообіг.

Abstract

The article is aimed at analyzing the current state of the logistics system in the Ukrainian market. Analyzing statistical data, the article investigates the current state of transport logistics in the domestic market.

Keywords: freight transport, logistics, cargo turnover.

Introduction

The international logistics services market is currently developing incredibly fast. The growth of the logistics services market in Ukraine, unfortunately, is not as rapid. There are a number of problems that slow down the development of the logistics services market, including: lack of a proper state approach to logistics issues; escalation of conflicts between logistics market players amid increased competition; breach of contractual terms; and low level of logistics services. The military aggression of the Russian Federation against Ukraine, the blockade of Ukrainian ports at the Black Sea, large-scale destruction and damage to enterprise assets, roads, bridges, warehousing and transshipment infrastructure (especially in the eastern and southern industrial regions of Ukraine) have provoked large-scale energy and food crises at the national, regional and global levels. This has led to the destruction of the existing global economic order and the need to address the security of cargo transportation logistics as a matter of priority. In times of war, the country's transport and logistics system has a decisive impact on the humanitarian, social, food, energy and, above all, military security of Ukraine. The slow pace of development of the national market of logistics services compared to international trends in this industry, insufficient use of potential, and loss of competitive positions make it necessary to assess the real state of development of Ukraine's logistics and transport infrastructure.

Research Results

A study of the volume of freight transported by various modes of transport showed that almost all modes of transport have seen a decline in recent years.

According to the State Statistics Service (Table 1), the volume of road transport traffic grew by 7.5% in 2017-2018, decreased by 4.89% in 2019, increased by 7.4% in 2020, and decreased by 9% again in 2021.

The volume of rail traffic decreased in 2017-2020, but in 2021, the volume of traffic increased by 2.6% compared to 2020.

There has also been a downward trend in pipeline transportation volumes in 2017-2021.

In 2017-2021, aviation accounted for 0.007% of the total volume of cargo transported.

Only the volume of cargo transported by river and sea transport remained at the same level in 2017-2020, and as of the end of 2021, it decreased by 25%.

The summary data on the volume of freight traffic in Ukraine for 2017-2021 by type of transport is presented in Table 1 [1].

Table 1. Volume of freight transported in Ukraine in 2017-2021 by type of transport.

| Transport | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------|------|------|------|------|------|
| Mln.t | | | | | |
| rail | 339 | 322 | 313 | 306 | 314 |

| | | | | | |
|----------|-------------|-------------|-------------|-------------|-------------|
| road | 1122 | 1206 | 1147 | 1232 | 1121 |
| water | 6 | 6 | 6 | 6 | 5 |
| sea | 2 | 2 | 2 | 2 | 2 |
| river | 4 | 4 | 4 | 4 | 3 |
| air | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| pipeline | 115 | 109 | 113 | 97 | 78 |
| | 1582 | 1643 | 1579 | 1641 | 1518 |

As a result of the large-scale invasion of Ukraine by Russian troops, there has been a significant decline in freight traffic. Let's take a closer look at the volume of freight traffic and cargo turnover in Ukraine in 2022-2023.

According to GMK Center data (Figure 1), in 2022 the volume of freight traffic decreased by 49.8% compared to 2021. In 2022, rail freight volumes totalled 150 million tonnes, down 52.1% compared to 2021. Road freight volumes decreased by 22% to 175 million tonnes. Port transshipment volumes decreased by 61% to 59 million tonnes [2].

The volume of freight traffic in Ukraine in 2022 is shown in Figure 1.

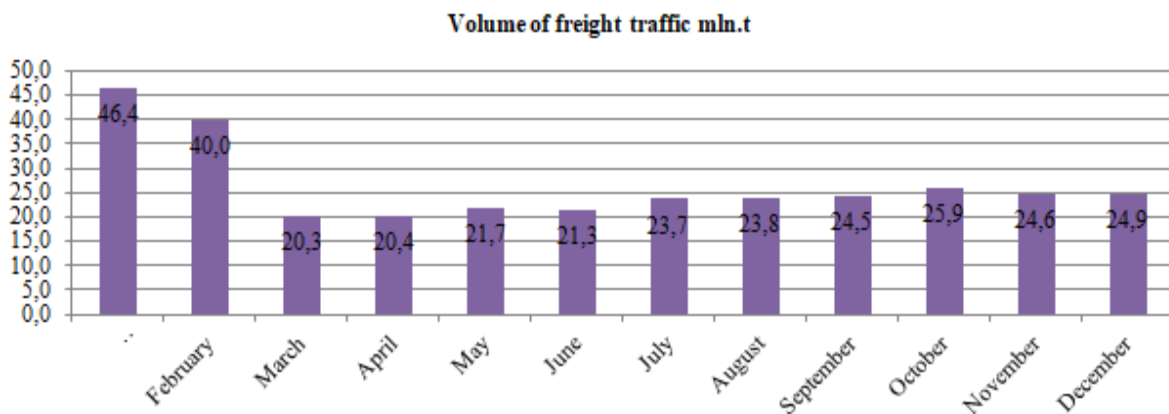


Figure 1. Freight traffic in Ukraine in 2022 [3].

Over time, according to Viktor Berestenko, President of the Association of International Freight Forwarders of Ukraine, the business adapted and reoriented itself and began to develop new export routes. In particular, via land corridors through European countries, which can be divided into two global directions: the western transport corridor to Poland, Germany, and the Baltic countries and the southern transport corridor, mainly to Romania [2].

Ukraine's cargo turnover in 2022 is shown in Figure 2.

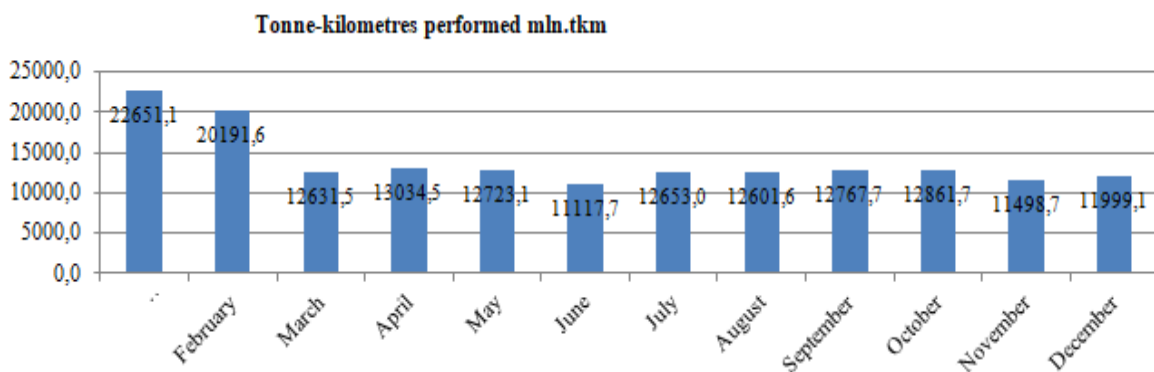


Figure 2. Ukraine's cargo turnover in 2022 [3]

Analyzing the data in Figure 2, it was established that cargo turnover in Ukraine in 2022 amounted to 166,731.3 million tkm. Since March 2022, cargo traffic has decreased by 39% compared to the data before the large-scale invasion.

Railway transport of Ukraine is considered a leading industry in the road and transport complex. In the course of 2023, 148.4 million tons of cargo were transported by rail transport in all types of connections.

From March to December of last year, the Ukrzaliznytsia company transported on average 23% more cargo per month than during the same period in 2022 – after a large-scale invasion.

Currently, unfortunately, due to the temporary occupation of the territories, Ukrzaliznytsia cannot reach the indicators of freight transportation before a large-scale invasion. But after the opening of the Ukrainian sea corridor and ports, it was possible to increase transportation for export. Thus, in 2023, 22.3 million tons of all cargo was transported through sea ports, and 34.4 million tons through land crossings.

In general, during the year, Ukrzaliznytsia transported an average of more than 12 million tons of cargo every month. November was a record-breaking month, when 14.1 million tons of cargo were transported by rail.

The indicators of domestic transportation increased most noticeably last year. Compared to 2022, they increased by 11.4% - up to 84.8 million tons [4].

The volume of freight transportation of Ukraine in 2023 is presented in Figure 3.

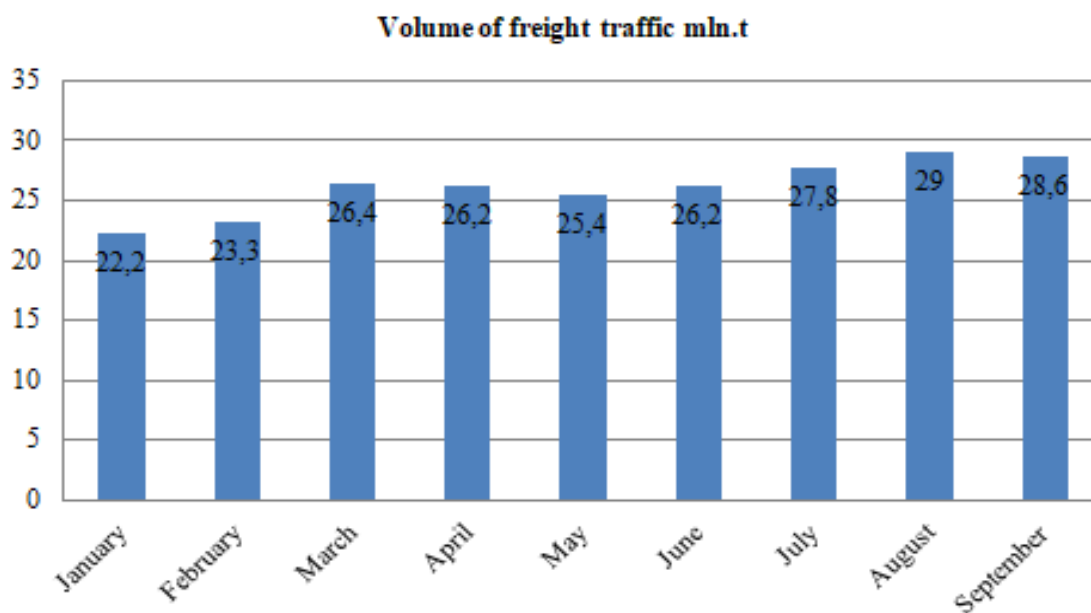


Figure 3. Volume of transported goods in 2023 [5]

In general, according to the results of 2023 (Figure 3), the volume of cargo transportation decreased by 26% compared to 2022 and by 75.8% compared to 2021.

The results of the analysis of freight turnover from January to September 2023 (Figure 4) showed that compared to the same period in 2022, the volume of freight turnover for January-February decreased by 41.8%.

The freight turnover of Ukraine in 2023, according to the State Statistics Service, is shown in Figure 4.

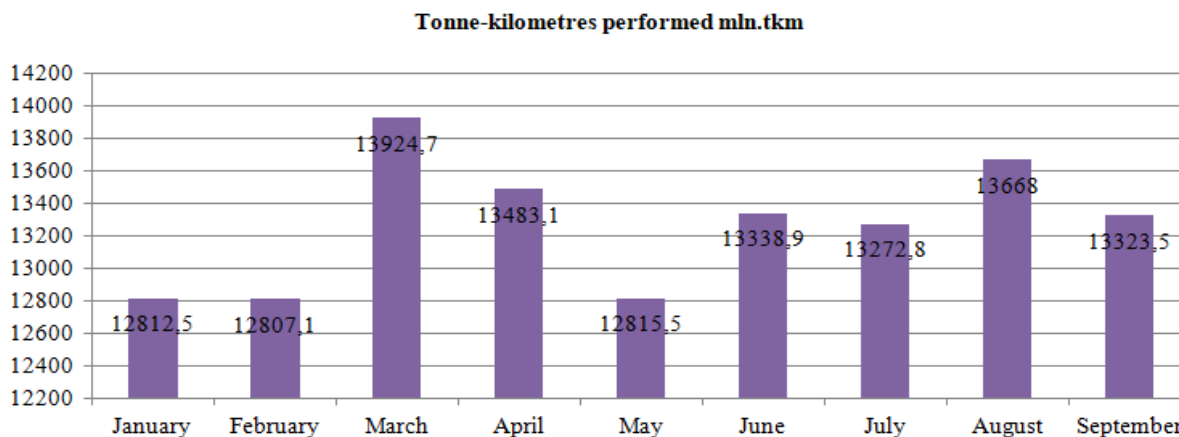


Figure 4. Freight traffic of Ukraine in 2023 [5]

Starting from March 2023, there is an increase in the dynamics of freight traffic: in March – by 10.2%, in April – by 3.4%, in May at almost the same level, in June – by 20%, in July – by 4.9%, in August – by 8.5%, in September – by 4.4%. But in general, for the period from January to September in 2023, freight turnover decreased by 8.4% compared to 2022.

Conclusions

Due to the difficult situation in the country, logistics development processes have slowed down. Using the statistical information of the State Statistics Service, it was established that the volume of transportation and freight turnover in Ukraine has decreased in recent years. This is due to a shortage of personnel, partly due to mobilization, partly due to migration. This is the key factor. Difficulties in the organization of transportation are related to problematic access to our seaports, and the closure of the grain corridor also contributed to this. This redirected carriers to routes through European countries. Road transport will not be able to cope with the entire volume of cargo due to possible blocking of the western borders. Therefore, there is a need to open additional border crossing points, and this will only partially solve the problem.

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