



## Keeping Upper and Middle Danube goods moving – consequences of the crisis (Ukraine and low water levels)

Danube Ports Day 2022  
04.10.2022, 11:00 – 15:15 (EET), online meeting



# Ukraine crises - overview



Ukraine crises

## 24<sup>th</sup> of February 2022

**Outbreak** Ukraine war  
Withdrawal of fleets from Ukrainian ports  
Agricultural markets react with geographic re-orientation

## March 2022

**Russia** Threatens and decides on restrictions for grain exports to EU  
**Hungary** Export stop  
Relief after intervention (export licenses)  
**Serbia** Export stop  
Relief after intervention (export licenses)  
**Sea mines** Propaganda starting

## April 2022

**Sea mines** Official messages by APK on sea-mines

Novorossiysk station claimed that about 420 sea mines were floating on the water and accused Ukraine of violating the provisions of the 1907 Hague Convention.

COMMODITIES (OLD) APRIL 25, 2022 / 12:13 PM / UPDATED 3 DAYS AGO

### Floating mines hit Danube traffic - APK-Inform

By Reuters Staff 2 MIN READ

KYIV, April 25 (Reuters) - Ukrainian border guards last week closed several shipping lanes at the mouth of the Danube river due to drifting mines in Black Sea, analyst APK-Inform said on Monday.



### Opinion: Is There A Serious Sea Mine Threat In The Black Sea?

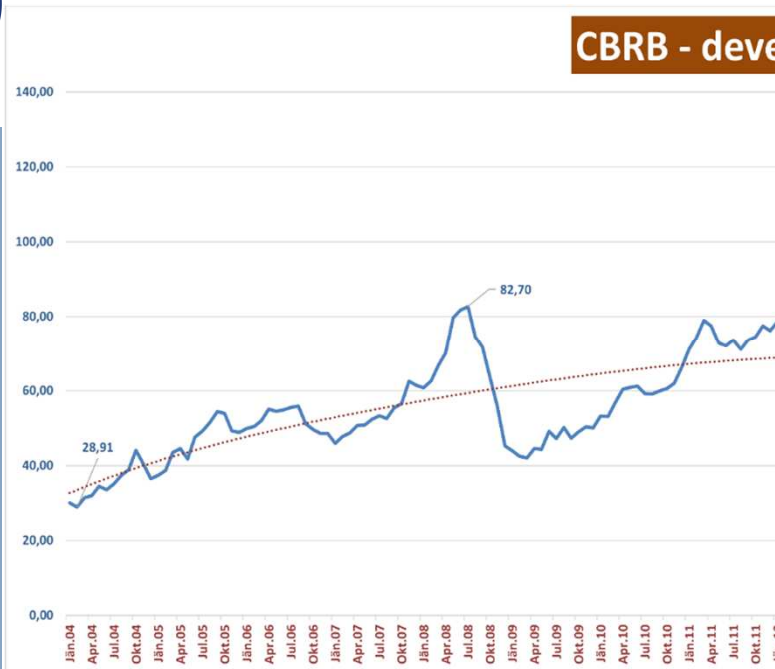
Russia's invasion of Ukraine had a significant impact on the freedom of navigation in the Black Sea. While blockades of areas off the coast of Odessa restricted maritime routes, a NAVTEX message from the Russian station of Novorossiysk revealed a new threat: floating sea mines...

Tayfun Ozberk © 27 Mar 2022

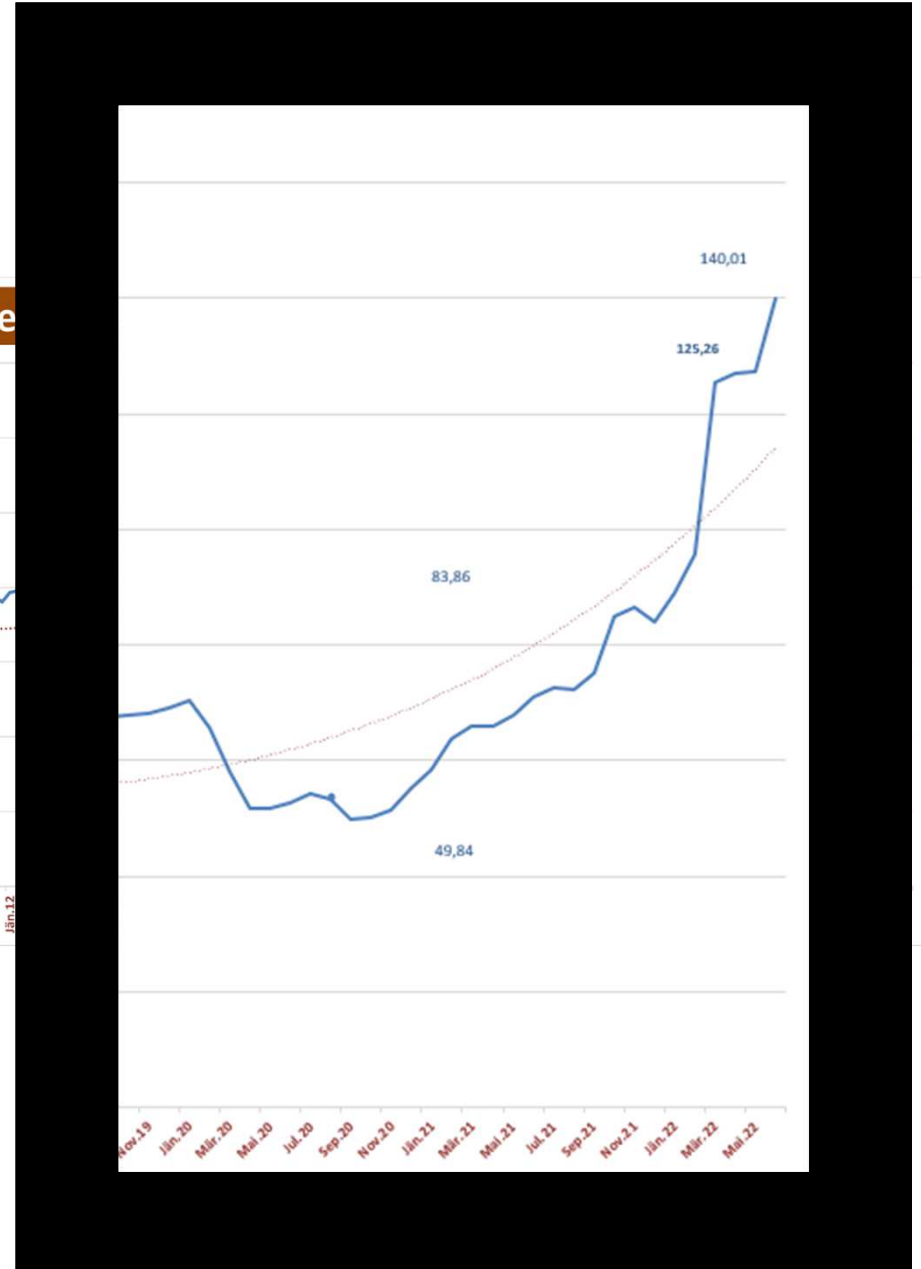
# Ukraine crises – impact 1



Ukraine crises



Source: TTS (Transport Trade Services) GmbH., Austria

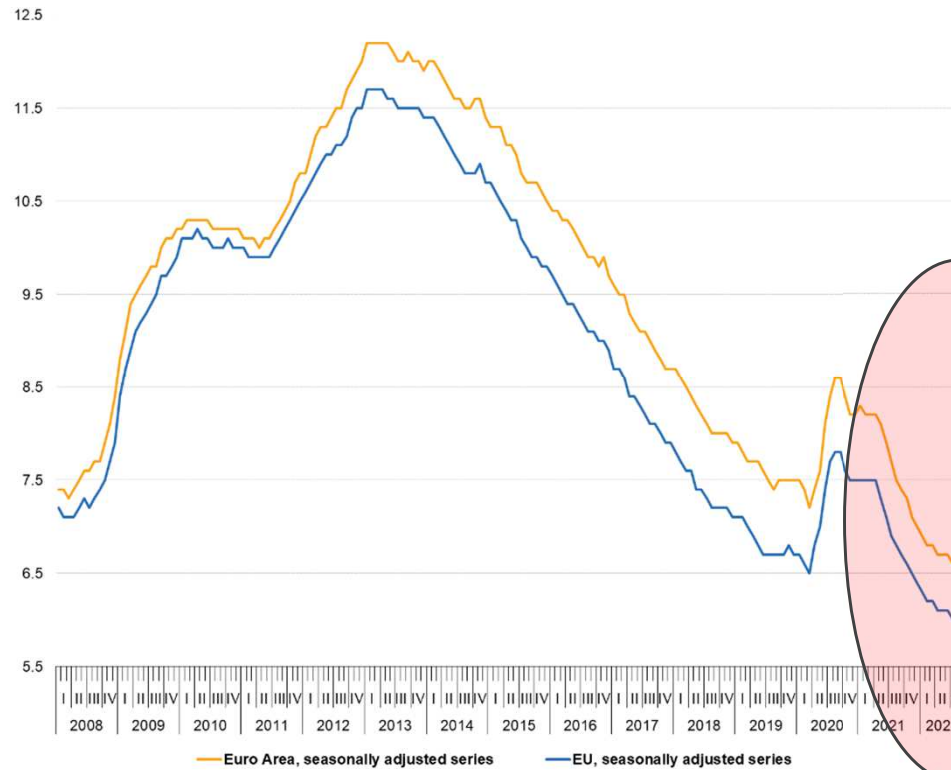


# Ukraine crises – impact 2



Ukraine crises

Unemployment rates, EU and EA, seasonally adjusted, January 2008 - August 2022



Source: Eurostat (online data code: une\_rt\_m)

eurostat

**Mobilization of army in Ukraine**  
- leading to lack of captains, sailors on the Danube

# Ukraine crises – impact 3



## Solidarity Lanes – 12<sup>th</sup> of May 2022

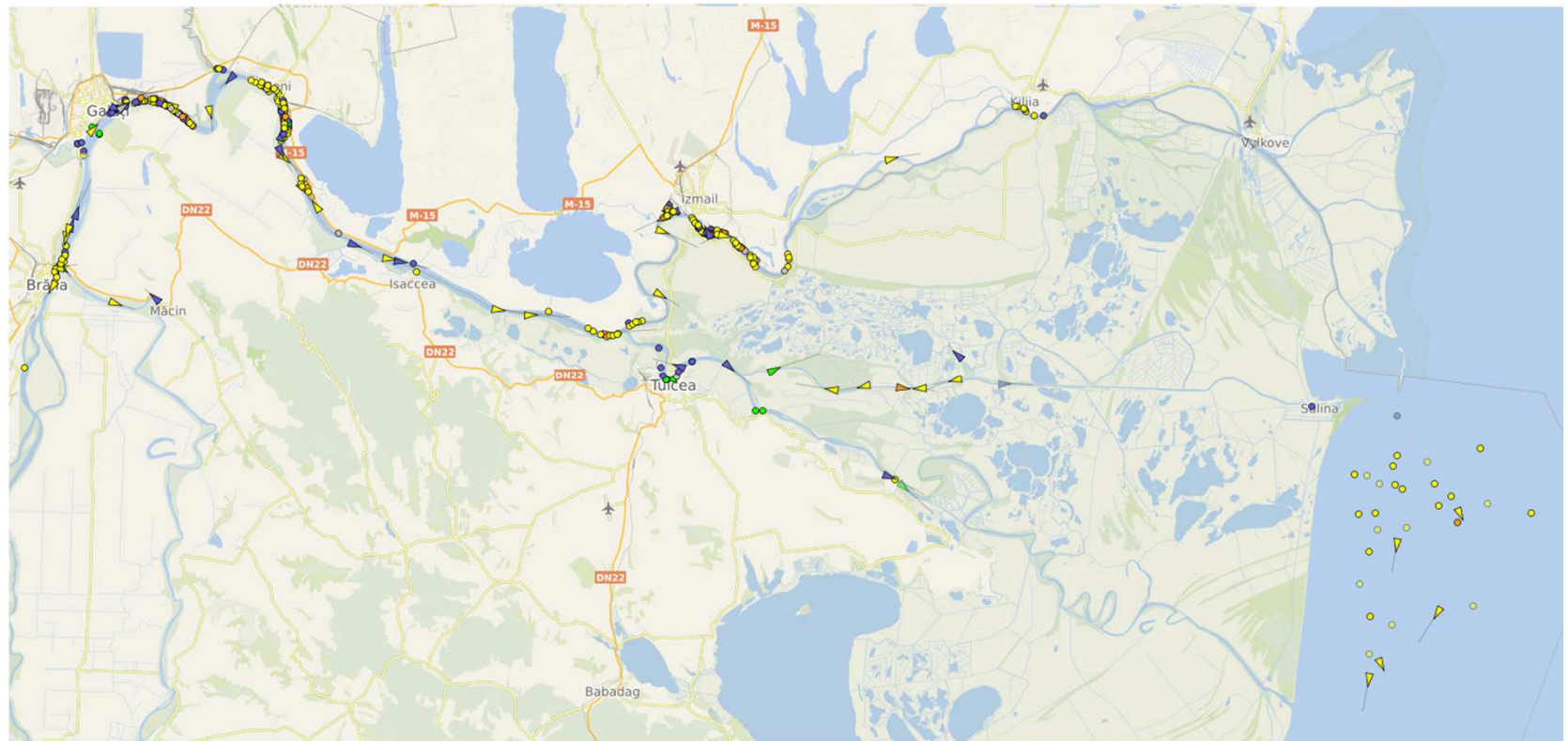
 EUROPEAN COMMISSION

Brussels, 12.5.2022  
COM(2022) 217 final

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**An action plan for EU-Ukraine Solidarity Lanes to facilitate Ukraine's agricultural export and bilateral trade with the EU**

Ukraine crises





Bottleneck - problematic



# Belene & Pfelling – bottlenecks on the Danube

## Pro Danube International

Addressing missing depth on 3rd of February 2022 to authorities

## Force Majeure - situation

06<sup>th</sup> of July 2022





# Summary – Upper Danube



## Spring:

Business benefited from outbreak Ukraine crises – as volumes being re-directed

## Summer:

War & opening of Solidarity Lanes - lead to

- a. higher freight rates (cost of energy)
- b. missing vessel capacity
- c. higher freight rates (supply & demand)

Bottleneck at Pfelling and Belene – lead to

- d. even higher pressure on vessel capacities
- e. serious supply problems for industries
- f. higher freight rates due to LWS & trucking

Ukraine crises

# Summary – Upper Danube



Ukraine crises

## Autumn/Winter:

- a. Industries currently refiling their stocks
- b. Agri business will sourced geographically different due to bad harvest
- c. Freight rates will stay on higher side, as
  - Ukraine war continues
  - Ukraine volumes transported via Danube
  - Germany binding massive capacity for coal
- d. Vessel capacities are balanced with demands (except Danube – Rhine – Danube connection)





Thanks for your time & attention !!!

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