REBUILD UKRAINE:
CHALLENGES AND OPPORTUNITIES FOR THE INFRASTRUCTURE
**PRODUCE. DELIVER. FEED**

**GRAIN EXPORT, 2021**

<table>
<thead>
<tr>
<th>Country</th>
<th>Export of grain crops from Ukraine to the countries of the world in 2021</th>
<th>thousands tons</th>
<th>mln $</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>10 854.7</td>
<td>2 491.2</td>
<td></td>
</tr>
<tr>
<td>Egypt</td>
<td>5 548.1</td>
<td>1 377.3</td>
<td></td>
</tr>
<tr>
<td>Turkey</td>
<td>3 814.9</td>
<td>833.8</td>
<td></td>
</tr>
<tr>
<td>Indonesia</td>
<td>3 126.1</td>
<td>655.9</td>
<td></td>
</tr>
<tr>
<td>Iran</td>
<td>2 034.6</td>
<td>498.5</td>
<td></td>
</tr>
<tr>
<td>Pakistan</td>
<td>1 349.4</td>
<td>351.4</td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>1 002.4</td>
<td>309.2</td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>1 267.8</td>
<td>304.0</td>
<td></td>
</tr>
<tr>
<td>Libya</td>
<td>1 411.5</td>
<td>299.2</td>
<td></td>
</tr>
<tr>
<td>Israel</td>
<td>1 183.0</td>
<td>267.4</td>
<td></td>
</tr>
</tbody>
</table>

**WORLD FOOD CENTER**

440 000 000 people – Ukraine covers the food needs

- **30,5%** world's sunflower oil production
- **place on barley exports**
- **place on potato producer**
- **place on corn exports**
- **4th** world wheat market
- **5th** largest producer of rye in the world

**AGRICULTURAL PRODUCTS EXPORT, 2022**

- Ferry
- Danube ports
- Railway
- Automobile

https://minagro.gov.ua/
EFFECTIVE LOGISTICS – >
ECONOMIC ADVANTAGES FOR UKRAINE AND PARTNERS

INDUSTRY

- 45% of the world’s neon supply was provided by only 2 Ukrainian companies: Ingas (Mariupol) and Cryoin (Odesa).
- 22 global and regional manufacturers of car parts in Ukraine
- Ukrainian companies account for one-fifth of all European imports of car wires

169.5 thousand km of state highways
22 thousand km of railway tracks
25 international airports
18 ports

THIS GIVES US THE OPPORTUNITY TO MAKE THE MOST OF NATURAL RESOURCES AND FEED THE WORLD

TRANSPORT HUB EU – UA - ASIA

In 2020-2021 Ukraine implemented the largest infrastructure projects during the years of Independence – restoring 37% of state roads, launching programs for railways and airports
Since 2014, Ukraine has restrained the imperial ambitions of the Russian Federation in the European region.

The price of 8 years of war is at least 60k lives of Ukrainians.
INFRASTRUCTURE IS THE NO.2 TARGET OF RUSSIAN AGGRESSORS

305 bridges on the state roads were destroyed

24 700 km of the state roads were damaged

6 500 km railways were damaged, destroyed or out of control

15+ of the largest taxpayers of Ukraine stopped their activities due to the destruction of enterprises and the impact of the war

TOTAL INFRASTRUCTURE DAMAGES: $95 BILLION
SURVIVAL PHASE

TRANSPORTATION IS THE CIRCULATORY SYSTEM OF THE (WAR) ECONOMY

After the liberation of the territories from the Russian occupiers, we restored transport connections on 43 bridges on the roads and 13 rail bridges and 20 railway bridges and overpasses.

EMERGENT NEEDS

Rapid delivery

- Humanitarian aid delivery
- Fuel supply
- Increased border control capacity

RECOVERY PLANS

Rapid recovery of transport infrastructure

- Roads and bridges
- Railway system
- Sea ports
- Aviation

PREVENTING A HUMANITARIAN CATASTROPHE IN UKRAINE:

- Proper Transport to Deliver Cargo to Affected Regions
- Urgent solutions to accommodate people who have lost their homes as a result of Russian invasion

PREVENTION OF THE GLOBAL FOOD CRISIS:

- Proper Logistics for Ukraine’s Agriculture inside the country
- Proper Logistics for Ukraine’s Export of Agricultural Products and Critical Imports for Ukraine’s Agriculture
- Restoration of transport corridors destroyed by the war
- Construction of temporary housing for temporarily displaced persons
- Building the infrastructure needed to expand export opportunities across the western borders
DEVELOPMENT OF LOGISTICS CAPACITY

DYNAMICS OF FREIGHT TRANSPORTATION IN THE CONDITIONS OF WAR, THOUSAND TONS PER MONTH

<table>
<thead>
<tr>
<th>Month</th>
<th>Railway</th>
<th>Danube ports</th>
</tr>
</thead>
<tbody>
<tr>
<td>March</td>
<td>3,045</td>
<td>390</td>
</tr>
<tr>
<td>April</td>
<td>3,894</td>
<td>893</td>
</tr>
<tr>
<td>May</td>
<td>3,869</td>
<td>1,327</td>
</tr>
<tr>
<td>June</td>
<td>3,212</td>
<td>1,447</td>
</tr>
<tr>
<td>July (plan)</td>
<td>3,800</td>
<td>1,500</td>
</tr>
<tr>
<td>August (plan)</td>
<td>3,900</td>
<td>1,500</td>
</tr>
</tbody>
</table>

IN THE CONDITIONS OF WAR WE ARE SIGNIFICANTLY INCREASING THE LOGISTICS POTENTIAL OF THE WESTERN BORDERS AND THE DANUBE PORTS

CARGO CIRCULATION IN THE CROSS-SECTION OF AUTOMOBILE CHECKPOINTS IN MARCH-JUNE 2022 (THOU. TONS)
REBUILD UKRAINE: INFRASTRUCTURE

STRATEGIC GOAL AFTER THE VICTORY

- recovery of infrastructure and full-fledged work of all transport sectors
- integration of the Ukrainian transport system into the EU transport system
- harmonization of legal and organizational aspects of functioning

QUANTITATIVE INDICATORS UNDER THE RECOVERY PLAN:

- Reconstruction and construction of new rail tracks: **1412,8 km** (incl. 585 km - HSR)
- Purchase, repair and modernisation of over **7,000** rolling stock units
- Reconstruction/ construction of **5** international airports
- Restoration of passenger traffic in Ukrainian airports up to the 2021 level: **16.2 million** passengers
- Modernisation of **3 sea ports** in the Danube Region
- Modernisation of **6** navigation locks and construction of **1** lock
- Recovery/ construction of **51,2 thousand km** of public motor roads
- Construction of over **1,4 thousands bridges** (taking account of the NATO standards)
- Construction/ modernisation of **17 BCPs** Institutional support for the tourism and recreation sector and postal sector
INDEPENDENT RECOVERY MANAGEMENT

PREVENTION OF CORRUPTION RISKS

1. Separate Agency to manage the recovery with the Donors and Partners involvement and leadership

2. Public control over digital management processes (planning, procurement, and implementation of projects)

3. "User's office" for international partners who finance the reconstruction of the country, where they will be able to monitor the progress of projects, in particular to generate their own analytical reports

4. Harmonization of the quality management system with modern world anti-corruption standards, in particular ISO, CIPS certification, etc.

DIGITAL MANAGEMENT TOOLS

UNIFIED PROJECT QUALITY MANAGEMENT SYSTEM AT ALL STAGES OF THE INFRASTRUCTURE CYCLE

- The system will prevent possible corruption risks in the use of budget and donor funds, as well as provide the state with tools to apply the most effective solutions at each stage of the reconstruction process

GEOANALYTICAL MODULE

- A multi-level database that will be the basis for making decisions regarding the feasibility and priority of reconstruction of certain objects. It is based on a register of damaged infrastructure, which is corresponded and integrated with other private and public databases

DIGITAL MANAGEMENT TOOLS

- Creation of the complete register of damaged infrastructure with the ability to adjust it
- Formation of databases on socio-economic activity in the regions based on cooperation with private data operators
- Formation of interactive zones of economic and social activity based on updating data on the work of Ukrainian enterprises, business surveys, data collection
- Creation of an interactive map of areas that remain at risk of potential attack
- Development of a separate tool for multifactor analysis of reconstruction
- Integration of data into a single geoanalytical module and adjustment of regional reconstruction plans
STRONGER UKRAINE
STRONGER EUROPE