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1 Initial State of the Market in the First Quarter of 2026

The initial condition of the key transport market sectors in Danube shipping at the start of 2026 was defined by the dynamics of the third (Q_3) and fourth (Q_4) quarters of 2025, the overall results for 2025, as well as tentative projections regarding the Gross Domestic Product (GDP) volume of European Union and Eurozone member states in 2026 compared to 2025, alongside forecasts concerning the state of the defining freight market segments in Danube navigation. According to the forecast by EUROFER (European Steel Industry Trade Association), no sustained growth was expected in the steel industry of the European Union and Eurozone countries, as well as in the Danube River and adjacent basins (Rhine-Main-Danube system, Black Sea basin), in 2026. According to the forecast by the USDA (United States Department of Agriculture), an unstable recovery in the agricultural sector market was expected in the first half of 2026, accompanied by a relative stabilization of demand.

In the first quarter (Q_1) of 2026, starting in January (the first attack on the Izmail port region occurred on January 1, 2026) and practically monthly thereafter, Russia regularly carried out air attacks using unmanned aerial vehicles on Ukraine's port infrastructure on the Danube River.

As a result of these attacks, berths, utility lines, storage facilities, and administrative buildings were damaged in Ukraine's Danube ports; vessels undergoing cargo operations were also damaged. Civil facilities adjacent to port areas were affected as well, endangering the lives of civilians.

Consequently, the attacks on Ukraine's Danube port infrastructure continued to impact the Danube shipping market, maintaining the risks characteristic of 2025 and heightening safety threats to navigation on the Lower Danube.

Considering the relative stability of navigation conditions, as well as the partial reorientation of the market, cargo transport volumes in Q_1 2026 amounted to:

- Through the Jochenstein lock (German-Austrian cross-border traffic): **392 thousand tonnes**, or **62%** of the Q_1 2025 volume;
- Through the Gabčíkovo lock (Slovakian-Hungarian cross-border traffic): **742 thousand tonnes**, or **72%** of the Q_1 2025 volume;
- Through the Mohács checkpoint (Hungarian-Croatian-Serbian cross-border traffic[1]): more than **688 thousand tonnes**, or **69 %** of the Q_1 2026 volume;
- Cargo volumes transported via the **Danube–Black Sea Canal** amounted to **3,390 thousand tonnes**, or **94%** of the Q_1 2025 volume;
    - international movements: 2,400 thousand tonnes, or **92%** of the Q_1 2025 volume;
    - national movements: 990 thousand tonnes, or **98%** of the Q_1 2025 volume.

The total cargo turnover of Danube ports in the first quarter of 2026 amounted to **2.5 million tonnes** (Table 1.1), which is **93%** of the Q_1 2025 volume.

[1] Since the partial change in Mohács's status within the market observation system (following Croatia's accession to the Schengen Area in January 2023) a minority of cargo vessel passages is missing from the Mohács Border Port administration's statistical reports.

Table 1.1 Cargo turnover of the Danube ports in the first quarter 2023-2026 (thousand tonnes)

Port/year	2023 Q_1	2024 Q_1	2025 Q_1	2026 Q_1
Germany	453	1,276	542	474
Austria	1,232	1,391	1,339	1,088
Slovakia*	371	471	424	338
Hungary	840	1,122	980	728
Croatia**	80	90	51	93
Serbia**	3,426	3,295	3,043	2,726
Bulgaria	2,001	1,606	1,505	1,462
Romania	6,012	7,002	4,653	4,332
Republic of Moldova	610	699	621	807
Ukraine	6,806	5,653	2,311	1,728
Total	21,831	22,605	15,469	13,776

* Only Bratislava and Komarno
**Numbers for Croatia and Serbia also include the countries' transport volumes on the Sava River

The river vessel cargo turnover at the Port of Constanța reached 3,099 thousand tonnes, or 96% compared to the cargo turnover in Q_1 2025; at the same time, 225 thousand tonnes were loaded from Romanian ports bound for Ukraine's Danube ports, and 27 thousand tonnes of cargo arriving from Ukrainian ports were unloaded.

It should be noted that despite systematic shelling and constant security threats to port personnel and ship crews engaged in cargo operations, the Danube ports of Ukraine – Reni, Izmail, and Ust-Dunaisk – were able to ensure the maximum possible cargo handling volumes under the current conditions.

The cargo turnover of Ukraine's Danube ports in Q_1 2026 and its dynamics for 2024–2025 are presented in Table 1.2.

Table 1.2. Cargo turnover of Ukrainian Danube (river+sea) ports in exports in Q_1 2026 (thousand tonnes)

Port/period	Izmail	Reni	Ust-Dunaisk
2024	13,448	3,431	517
2025	7,625	1,098	184
Q_1 2025	1,991	266	54
Q_1 2026	1,474	227	27

The cabin cruise passenger shipping market on the Upper Danube routes (based on statistics from the Gabčíkovo lock) in the first quarter of 2026 showed the following dynamics (Table 1.3).

Table 1.3. Passenger transport at the Gabčíkovo lock in Q_1 2026 (pieces and thousand people)

Period/variable	Number of vessels	Number of passengers
January	19 (51*)	1.1 (5.0*)
February	21 (10*)	2.0 (1.0*)
March	178 (167*)	22 (18*)

* Figures for the corresponding period of 2025 are given in brackets for comparison.

On the Middle Danube, according to statistics from the Mohács checkpoint, passenger ship traffic was insignificant in the first quarter of 2026.

2 Navigation Conditions in the First Half of 2026

2.1 General Overview of Navigation Conditions in the First Half of 2026

In January, on the Upper Danube (Figure 1), low (LNWL) and mean (MWL) navigable water levels were lower than the corresponding values in January 2025 by 90 cm and 140 cm, respectively, while high water levels (HNWL) were higher by 110 cm. The lowest levels were observed in the first ten-day period and in the second half of the third ten-day period of the month. For 20 days, they reached or were below the low navigable water level.

On the Middle Danube (Figure 2), minimum water levels were 80 cm lower than the corresponding values in January 2025, mean levels were 100 cm lower, and maximum levels were 160 cm lower. The lowest levels were observed in the first half of the month. For 28 days, they reached or were below the low navigable water level.

On the Lower Danube (Figures 3 and 4), minimum water levels were 120 cm lower than the corresponding values in January 2025, mean levels were 50–140 cm lower, and maximum levels were 70–80 cm lower. The lowest levels were observed in the first ten-day period of the month. For 6–9 days, they reached or were below the low navigable water level.

In February, on the Upper Danube (Figure 1), minimum water levels were 80 cm lower than the corresponding values in February 2025. Mean and maximum water levels were higher by 40 cm and 190 cm, respectively. The lowest levels were observed in the first ten-day period of the month. For 6 days, they reached or were below the low navigable water level.

On the Middle Danube (Figure 2), minimum water levels were 30 cm lower than the corresponding values in February 2025. Mean and maximum water levels were higher by 40 cm and 240 cm, respectively. The lowest levels were observed in the first ten-day period of the month. For 8 days, they reached or were below the low navigable water level.

On the Lower Danube (Figures 3 and 4), minimum water levels were 150–160 cm higher than the corresponding values in February 2025, mean levels were 170–180 cm higher, and maximum levels were 200–240 cm higher. The lowest levels were observed at the beginning of the month and in the second ten-day period.

In March, on the Upper Danube (Figure 1), minimum and mean water levels were 10–40cm higher than the corresponding values in March 2025, and maximum levels were 130 cm higher. The lowest levels were observed at the end of the month.

On the Middle Danube (Figure 2), minimum water levels were 10 cm higher than the corresponding values in March 2025, while mean and maximum levels were 60–240 cm higher. The lowest levels were observed at the end of the month.

On the Lower Danube (Figures 3 and 4), minimum water levels were 40–60 cm higher than the corresponding values in March 2025, mean levels were 40 cm higher, and maximum levels were 70–170 cm higher. The lowest levels were observed in the middle of the third ten-day period of the month.

In April, on the Upper Danube (Figure 1), minimum, mean and maximum water levels roughly corresponded to the water levels in April 2025. Maximum levels were observed in the middle of the second ten-day period of the month. Minimum levels were observed at the end of the month. For 5 days, they reached or were below the low navigable water level (LNWL).

On the Middle Danube (Figure 2), minimum water levels were lower than the corresponding values in April 2025 by 30 cm, mean levels by 40 cm, and maximum levels by 80 cm. Maximum levels were observed in the middle of the second ten-day period of the month. Minimum levels were observed at the end of the month. For 4 days, they reached or were below the low navigable water level.

On the Lower Danube (Figures 3 and 4), minimum water levels were 50–100 cm lower than the corresponding values in April 2025, mean levels were 60–80 cm lower, and maximum levels were 70–80 cm lower. Maximum levels were observed at the end of the first and beginning of the second ten-day period of the month. Minimum levels were observed at the end of the month.

In May, on the Upper Danube (Figure 1), minimum and mean water levels roughly corresponded to the water levels in May 2025; maximum water levels were lower by 50 cm. Maximum levels were observed in the middle of the second ten-day period of the month. Minimum levels were observed in the middle of the first and in the middle of the third ten-day period of the month. For 27 days, they reached or were below the low navigable water level.

On the Middle Danube (Figure 2), minimum water levels were lower than the corresponding values in May 2025 by 30 cm, mean levels by 40 cm, and maximum levels by 80 cm. Maximum levels were observed at the end of the second ten-day period and at the end of the month. Minimum levels were observed in the first half of the month. For 15 days, they reached or were below the low navigable water level.

On the Lower Danube (Figs. 3 and 4), minimum water levels were 100–110 cm lower than the corresponding values in May 2025, mean levels were 90–120 cm lower, and maximum levels were 40–100 cm lower. Maximum levels were observed in the first half of the third ten-day period of the month. Minimum levels were observed in the first half of the second ten-day period of the month. For 10 days, they reached or were below the low navigable water level.

In June, on the Upper Danube (Figure 1), minimum and mean water levels were lower than the corresponding values in June 2025 by 20 cm, and maximum levels by 40 cm. Maximum levels were observed in the middle of the second ten-day period of the month. Minimum levels were observed in the third ten-day period of the month. For 16 days, they reached or were below the low navigable water level.

On the Middle Danube (Figure 2), minimum water levels were lower than the corresponding values in June 2025 by 20 cm, mean levels by 30 cm, and maximum levels by 10 cm. Maximum levels were observed in the middle of the second ten-day period of the month. Minimum levels were observed at the end of the month. For 2 days, they reached or were below the low navigable water level.

On the Lower Danube (Figures 3 and 4), minimum water levels were 10 cm lower to 40 cm higher than the corresponding values in June 2025, mean levels were 50–70 cm lower, and maximum levels were 80–130 cm lower. Maximum levels were observed at the beginning of the month and the beginning of the second ten-day period. Minimum levels were observed in the first half and at the end of the month. For 13–14 days, they reached or were below the low navigable water level.

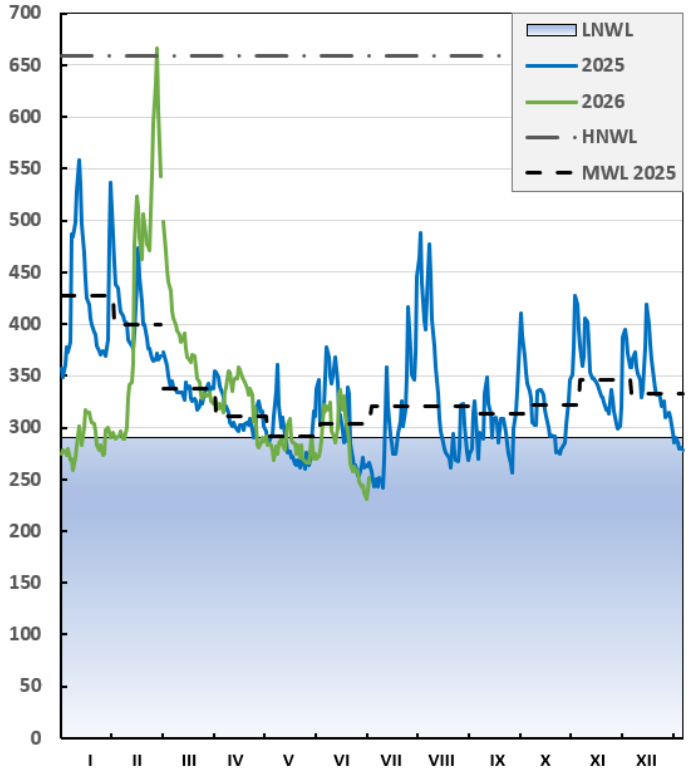


Figure 1. Daily water levels for the Pfelling gauging station (DE), (km 2306+530), in cm

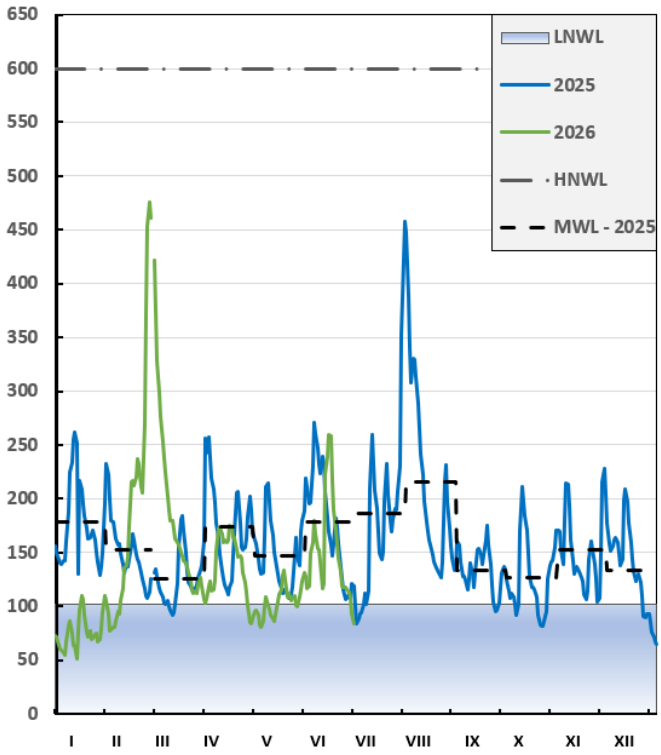


Figure 2. Daily water levels for the Budapest Vigadó station (HU), (km 1646+500), in cm

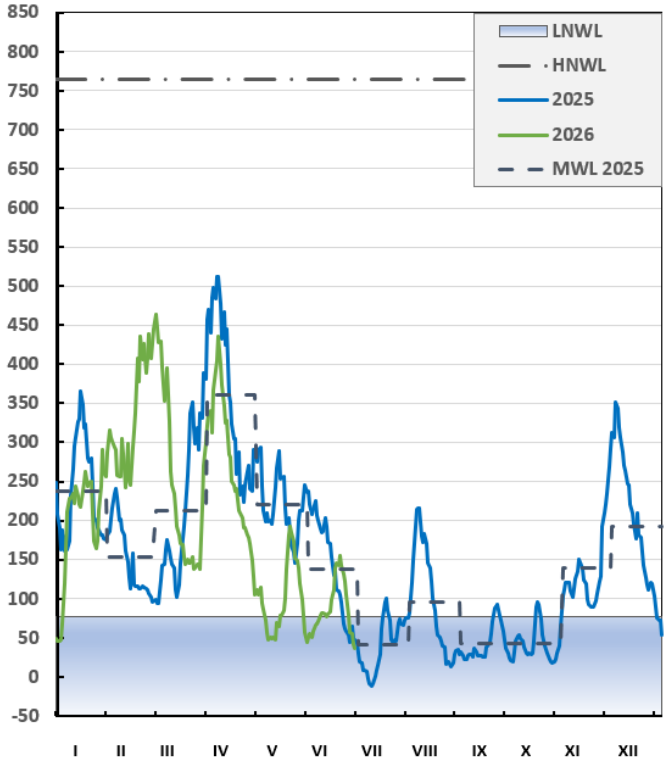


Figure 3. Daily water levels for the Novo Selo gauging station (BG), (km 833+600), in cm

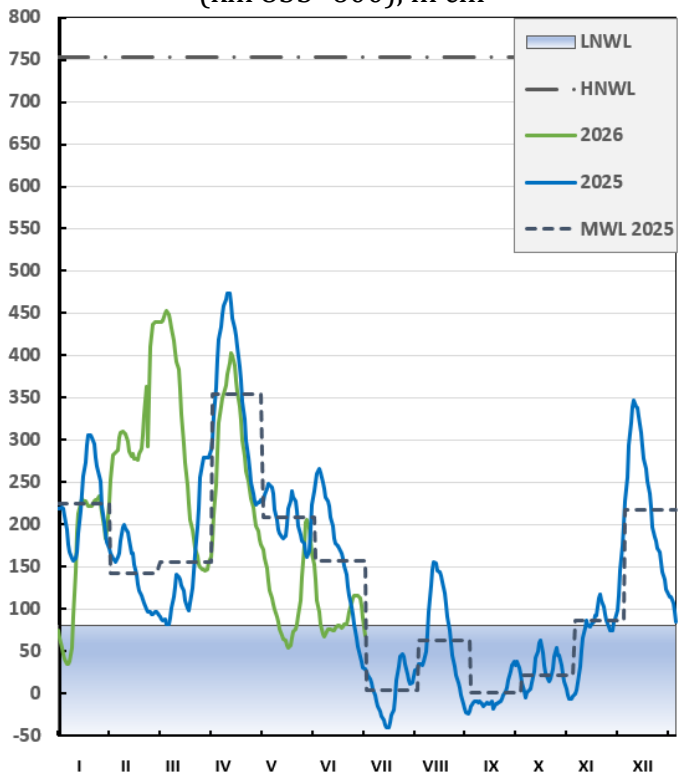


Figure 4. Daily water levels for the Silistra gauging station (BG), (km 375+000), in cm

2.2 Water Flow and Safe Operational Drafts for Vessels

In the first half of 2026, the key feature of the water flow was the virtual absence of the traditional spring flood on the Danube River in period April–May 2026.

Accordingly, as early as May, extremely low water levels were observed on the Upper and Middle Danube during this navigation period. In June and the subsequent months (July–August), extreme temperatures and lack of precipitation led to a critical drop in water levels across the entire Danube (Table 2.1). Moreover, at certain gauging stations, water levels dropped below the values recorded over the past 20–30 years of observation.

Table 2.1. Number of days in 2026 on which the LNWL was not reached

Gauge	rkm	LNWL	2026						
			Jan	Feb	Mar	Apr	May	Jun	Jul*
Kelheim (D)	2,415	250	31	7	3	9	30	19	31
Deggendorf (D)	2,284	210	19	7	0	6	29	17	29
Kienstock (A)	2,015	161	28	9	1	0	0	0	16
Wildungsmauer (A)	1,895	155	31	11	7	10	5	2	27
Nagybaics (HU)	1,801	46	23	10	3	3	9	3	26
Esztergom (HU)	1,719	48	26	8	0	4	13	3	27
Budapest (HU)	1,647	106	28	10	0	5	17	2	27
Dunaföldvár (HU)	1,561	-139	30	9	0	5	16	2	28
Apatin (RS)	1,402	47	31	10	0	3	27	3	31
Backa Palanka (RS)	1,299	47	31	3	0	1	19	3	31
Novo selo (BG)	834	77	6	0	0	0	10	12	31
Calafat (RO)	795	-5	6	0	0	0	16	21	31
Silistra (BG)	376	80	9	0	0	0	10	12	31

* Although the current report is officially intended to cover only the first six months of 2026, the Secretariat is also including the July data here in light of the extreme hydrological conditions on the Danube River.

The consequences of these critical hydrological conditions led to significant disruptions in fleet traffic operations (groundings, inability to safely approach berths, and dangers when meeting and passing pushed convoys), real safety hazards under current navigation conditions, decreased port cargo turnover, and a partial suspension of navigation in certain sectors.

As early as May, working drafts for cargo vessels dropped to 2.0–2.1 m; by July, they fell to under 1.5 m (Table 2.2). Under these conditions—with fleet cargo capacity reduced by 40–50% from nominal capacity—several shipping companies were forced to suspend fleet operations entirely.

Similar problems arose with cabin passenger vessel traffic, where vessels with a nominal draft of 1.5 m were forced to interrupt operations due to emerging navigation safety risks.

Table 2.2. Draught of cargo vessels in Q_1+Q_2 2026 (cm)

Month	Loaded, going upstream	Loaded, going downstream
January	230/250 (250/270*)	220/230 (220/230)
February	250 (270)	220/210 (230)
March	230 (270)	200/210 (220/240)
April	200 (230)	170/160 (210/230)
May	200/210 (230)	180/170 (210/230)
June	200/210 (230)	180/190 (229/230)
July**	170/150 (190)	150/130 (160/180)

* Figures for the corresponding period of 2025 are given in brackets for comparison.

**Although the current report is officially intended to cover only the first six months of 2026, the Secretariat is also including the July data here in light of the extreme hydrological conditions on the Danube River.

It should be noted separately that the special measures taken by the Danube states to ensure the stable operation of national energy facilities (nuclear and hydroelectric power plants) had a significant impact on the fleet's movement regime, which led to the suspension of navigation in certain sections of the Danube River from July 2026.

3 Dynamics of the freight and passenger transport market in the first half of 2026

The state of the Danube cargo and passenger shipping market in the first half of 2026 was shaped by the main factors listed in Section 1, primarily the impact of Russian aggression against Ukraine on the Danube navigation regime.

In May–June, and subsequently in the following months of 2026, fleet traffic and, consequently, the transport market began to be significantly impacted by critical shallow water conditions occurring across virtually the entire navigable Danube.

3.1 Passenger transport in the first half of 2026

In April, a relatively stable passenger transport began on cabin cruise vessels. The core of cabin passenger shipping consists of Passau – Vienna – Bratislava – Budapest cruises, itineraries to/from ports on the Rhine and Main (conventionally referred to as the "Upper Danube", defined by statistics from the Jochenstein and Gabčíkovo locks), as well as

services to/from the Danube Delta direction (conventionally referred to as the "Middle Danube", defined by official statistics from the Mohács control point[2]).

- A total of 1,671 vessel transits were recorded through the Jochenstein lock, representing 98% of the volume in Q_1+Q_2 2025.
- A total of 1,958 vessel transits were recorded through the Gabčíkovo lock, of which 959 were upstream and 999 were downstream passages (Figure 5). In total, 284,000 passengers were carried in Q_1+Q_2 2026, reaching 110% of the volume recorded in Q_1+Q_2 2025.

Passenger transport volumes through Gabčíkovo lock in the first half (Q_1+Q_2) of 2026 compared to volumes in (Q_1+Q_2) 2025, alongside passenger traffic dynamics for 2023–2025, are presented in Table 3.2.

Table 3.1. Number of transported passengers through the Gabčíkovo lock in Q_1+Q_2 2026 (thousand passengers)

Control point/ period	**2023**	**2024**	**2025**	**2025 Q_1+Q_2**	**2026 Q_1+Q_2**
Upper Danube (Gabčíkovo lock statistics)	562	610	722	259	284

- On the Middle Danube, according to statistics from the Mohács control point, approximately 398 vessel transits were recorded, amounting to 108% of the level seen in Q_1+Q_2 2025.

It should be noted that in this period of time and in the future, passenger traffic statistics on the Middle Danube will be compiled based on data received from the competent authorities of Croatia.

It should also be noted that there were occasional passages of passenger ships with cabins through the Iron Gate 1 lock (RS) and on the Lower Danube at the Danube-Black Sea Canal (RO).

[2] Since the partial change in Mohács's status within the market observation system (following Croatia's accession to the Schengen Area in January 2023) the Mohács Border Port administration can only provide a reliable estimation for passenger transport results and only for number of vessel passages without number of passengers. Starting with the current report, the Secretariat will be publishing these data.

3.2 Transport volumes, cargo nomenclature and port turnover in the first half of 2026

The volume of cargo transported through the Jochenstein lock in Q_1+Q_2 2026 amounted to 891 thousand tonnes, representing 77% of the volume transported in Q_1+Q_2 2025.

In the cross-border transport between Hungary and Slovakia (HU/SK):

- The volume of cargo transported through the Gabčíkovo lock in Q_1+Q_2 2026 was 1,629 thousand tonnes (76% of the Q_1+Q_2 2025 volume);
- The volumes of transported cargo by commodity group for Q_1+Q_2 2025 and Q_1+Q_2 2026 are shown in Figure 5, while the main groups' volumes for the years 2023–2026 are represented in Tables 3.2 and 3.3.

Table 3.2. Some* cargo volumes on the Upper Danube (Gabčíkovo lock), going upstream (thousand tonnes)

Commodity group/year	**2023**	**2024**	**2025**	**2025 Q_1+Q_2**	**2026 Q_1+Q_2**
Food and forage	592	890	359	227	71
Iron ore raw mat.	726	720	576	335	118
Grain	427	568	371	211	43
Metal products	56	53	42	15	12
Petroleum prod.	41	35	20	12	9
Organic and synthetic fertilizers	55	119	114	39	17

** For a more detailed representation of transport volumes, see Figure 5.*

Table 3.3. Some* cargo volumes on the Upper Danube (Gabčíkovo lock), going downstream (thousand tonnes)

Commodity group/year	**2023**	**2024**	**2025**	**2025 Q_1+Q_2**	**2026 Q_1+Q_2**
Organic and synthetic fertilizers	418	347	430	229	103
Petroleum products	653	688	1,072	422	229
Metal products	155	169	235	124	94

** For a more detailed representation of transport volumes, see Figure 5.*

The largest decrease in volume was recorded in the transport of food and grain cargoes, as well as iron ore raw materials upstream, along with fertilizers and petroleum products downstream.

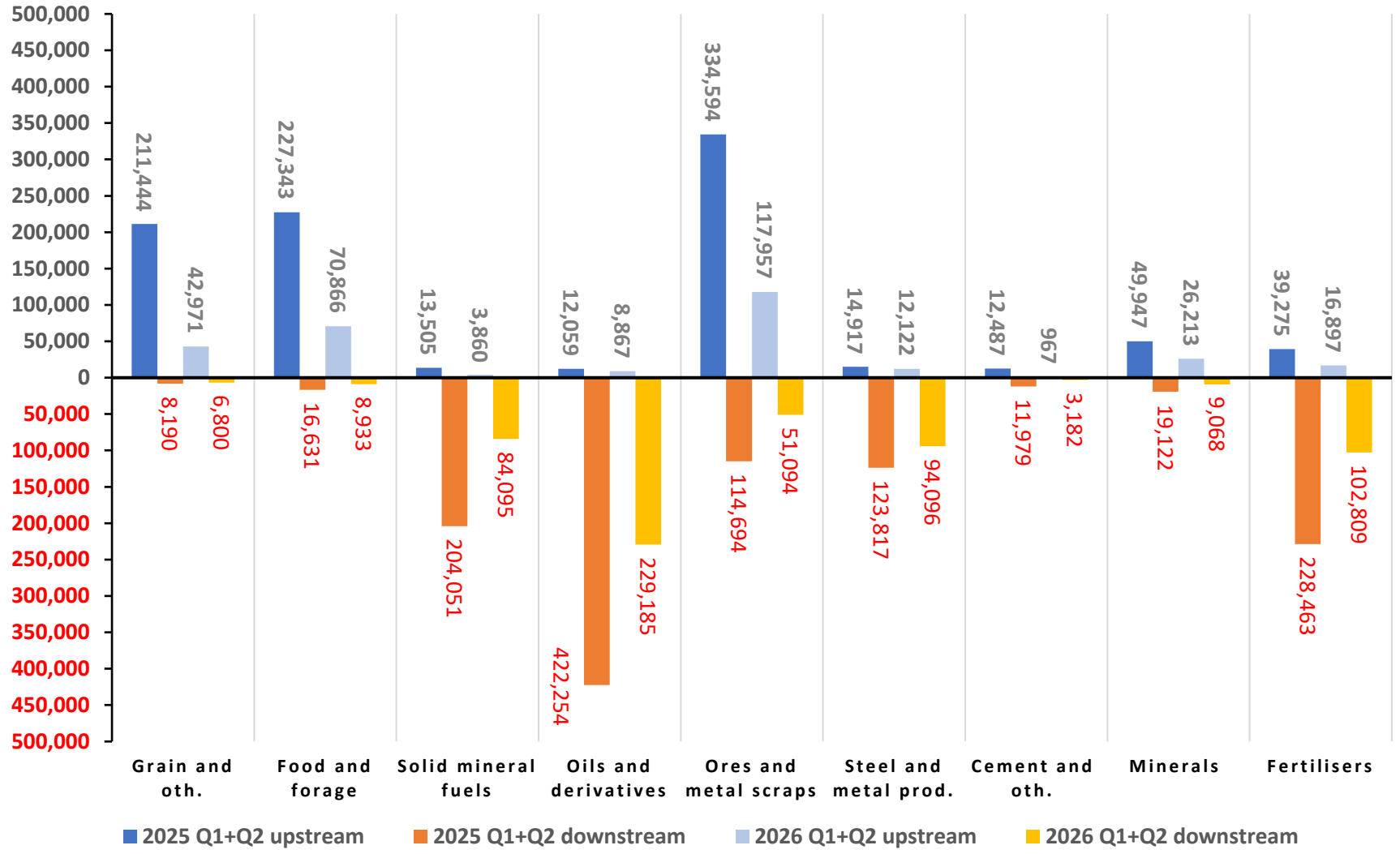


Figure 5. Commodity structure of cargo transport upstream/downstream the Danube River through the Gabčíkovo lock, in tonnes

In the cross-border transport between Hungary, Croatia and Serbia (HU/HR/RS):

- The volume of cargo transported through the Mohács checkpoint in Q_1+Q_2 2026 was 1,490 thousand tonnes (76% of the Q_1+Q_2 2025 volume);
- The volumes of transported cargo by commodity group for Q_1+Q_2 2025 and Q_1+Q_2 2026 are shown in Figure 6, while the main groups' volumes for the years 2023–2026 are represented in Tables 3.4 and 3.5.

Table 3.4. Some* cargo volumes at the Middle Danube (Mohács checkpoint) going upstream (thousand tonnes)

Commodity group/ year	**2023**	**2024**	**2025**	**2025 Q_1+Q_2**	**2026 Q_1+Q_2**
Iron ore raw mat.	692	747	497	271	207
Coal (coke)	2	24	0	0	0
Fertilizers	121	209	406	185	179
Petroleum products	154	243	87	47	36
Metal products	111	186	129	58	33

** For a more detailed representation of transport volumes, see Figure 6.*

Table 3.5. Some* cargo volumes at the Middle Danube (Mohács checkpoint), going downstream (thousand tonnes)

Commodity group/year	**2023**	**2024**	**2025**	**2025 Q_1+Q_2**	**2026 Q_1+Q_2**
Grain	317	441	274	137	225
Petroleum products	405	376	520	294	65
Metal products	381	357	388	184	184
Food products and animal feed	216	47	41	26	13
Fertilizers	186	280	306	177	151

** For a more detailed representation of transport volumes, see Figure 6.*

The largest volume decreases were recorded in the transport of iron ore raw materials upstream and petroleum products downstream.

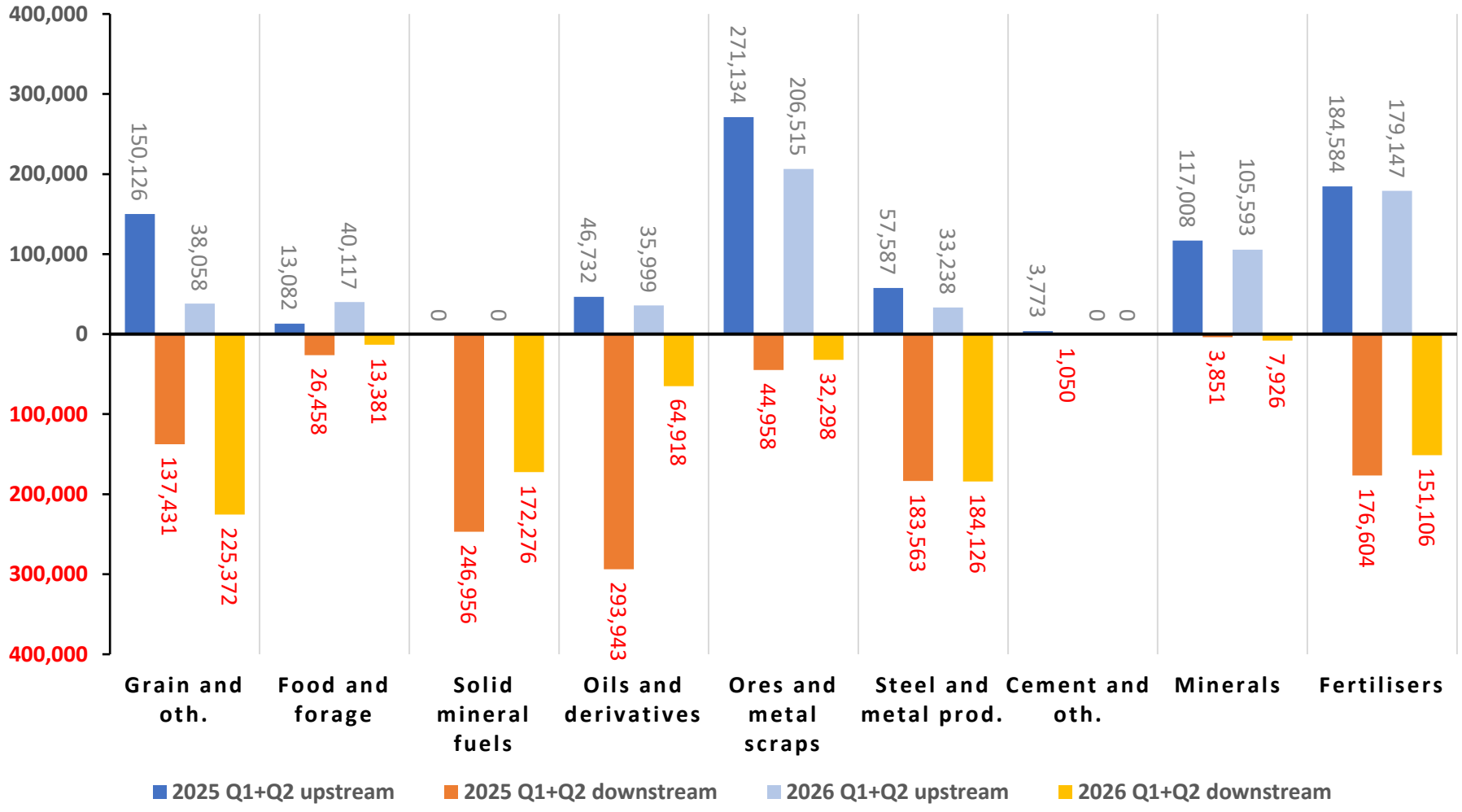


Figure 6. Commodity structure of cargo transport upstream/downstream the Danube River through Mohács, in tonnes

Transport via the Danube – Black Sea Canal

The volume of cargo transported via the Danube – Black Sea Canal in Q_1+Q_2 2026 (Figure 7) amounted to 7.24 million tonnes, which is 105% of the corresponding figure for Q_1+Q_2 2025, including:

- International transport accounted for 5.31 million tonnes, or 107% of Q_1+Q_2 2025;
- Domestic transport accounted for 1.93 million tonnes, or almost 100% of Q_1+Q_2 2025.

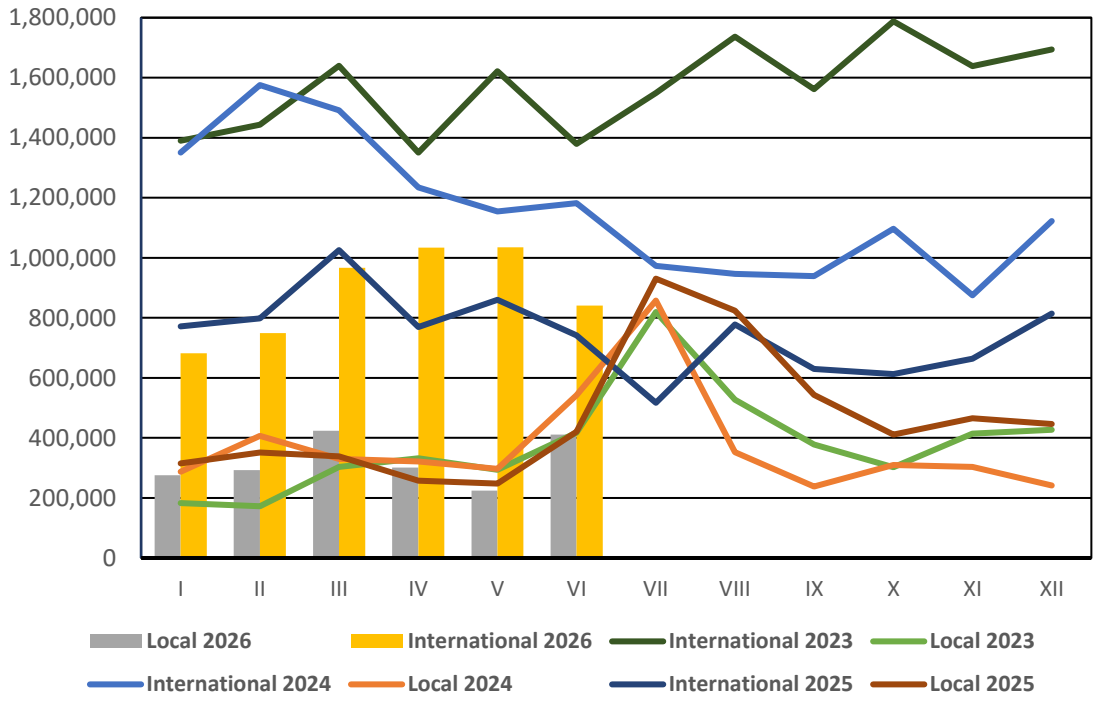


Figure 7. Volumes of international and national cargo transport through the Danube – Black Sea Canal, by month, in tonnes

Cargo turnover of Danube ports in Q_1+Q_2 2026 (data for 2023-2025 and Q_1+Q_2 2025–2026 are provided for comparison) showed divergent trends (Table 3.6).

Table 3.6. Cargo turnover of the ports of the Danube countries in several periods of recent years, (thousand tonnes)

Country/year	**2023**	**2024**	**2025**	**2025 Q_1+Q_2**	**2026 Q_1+Q_2**
Germany	2,228	2,047	2,266	1,001	1,109
Austria	4,760	5,349	5,130	2,632	2,288
Slovakia*	1,509	1,473	1,700	802	832
Hungary	3,604	4,019	3,940	2,022	1,445
Croatia**	364	392	319	133	271
Serbia**	12,931	12,816	12,280	6,627	5,733
Bulgaria	7,026	7,520	5,997	3,306	2,916
Romania	28,857	23,759	19,499	9,049	9.314
Republic of Moldova	2,668	2,579	2,626	1,078	1,654
Ukraine	32,021	17,396	8,907	4,464	3,401
Total	95,968	77,350	62,664	31,114	28,963

* Only Bratislava and Komarno
** The figures for Croatia and Serbia also include the countries' transport volumes on the Sava River

The cargo turnover of the Port of Constanţa by river vessels amounted to 6.6 million tonnes, in Q_1+Q_2 2026. During this period, 463 thousand tonnes were loaded in Romanian ports for shipment to Ukrainian Danube ports, while 53 thousand tonnes of cargo were unloaded, arriving from Ukrainian ports.

The cargo turnover of the Ukrainian Danube ports for 2024–2025 and Q_1+Q_2 2025-2026 is presented in Tables 3.7–3.8.

Table 3.7. Cargo turnover of Ukrainian Danube ports (river+sea), (thousand tonnes)*

Period/port	**Izmail**	**Reni**	**Ust-Dunaisk**
2024	13,448	3,431	517
2025	7,625	1,098	184
Q_1+Q_2 2025	3,837	485	101
Q_1+Q_2 2026	2,884	477	40

* Data received from the Administration of Sea Ports of Ukraine

Table 3.8. Export volumes of Ukrainian Danube ports (river+sea) in Q_1+Q_2 2026 (thousand tonnes)

Type of good/port	Izmail	Reni	Ust-Dunaisk
Cereals	410 (708*)	13 (67)	6 (0)
Other bulk goods	166 (486)	6 (36)	4 (11)
Mineral oil products (bulk)	65 (84)	0 (12)	0.0 (0.0)

* Figures in parentheses represent cargo turnover data for Q_1 2025.

4 Conclusions

In the first half of 2026, Russia's full-scale aggression against Ukraine continued to impact the Danube shipping market, maintaining the risks characteristic of 2025 and heightening threats to navigation safety on the Lower Danube.

In accordance with the Decision of the 104th Session of the Danube Commission, the Secretariat of the Danube Commission publishes on its website a summary of the *Register of Damage in the Lower Danube Region caused by Russian Military Actions*. Corresponding information regarding violations of the fundamental principles of the 1948 Belgrade Convention, compiled on the basis of the *Register of Damage*, was submitted to the leadership of the UN General Assembly, the European Commission, and the Council of Europe.

Throughout the first half of 2026, the Danube Commission continued its active efforts aimed at fully facilitating the export of Ukrainian agricultural products, as well as the import of goods vital to Ukraine. This work is conducted within the framework of the EU-Ukraine *Danube Solidarity Lanes* initiative, adopted in May 2022 in support of the European Union's solidarity measures with Ukraine.

The importance of this initiative becomes particularly critical amid the effective blockade of shipping through the Ukrainian Maritime Corridor in July 2026, caused by massive strikes on the infrastructure of Ukrainian seaports and on vessels bound to and from the ports of Odesa, Pivdennyi, and Chornomorsk.

In May–June, and in the following months, fleet movement and, consequently, the transport market began to be significantly impacted by critical shallow water conditions occurring across virtually the entire navigable Danube.

The consequences of these critical hydrological conditions along the Danube River led to substantial disruptions in fleet traffic operations, gave rise to severe navigation safety risks (groundings, inability to safely approach berths, dangers when meeting and passing pushed convoys), decreased port cargo turnover, and caused a partial suspension of navigation in certain sectors.

Cargo transport volumes during the first half of 2026, according to data from key control points used in analyzing the Danube shipping market, were significantly lower than the corresponding figures for the first half of 2025.

According to operational data, due to the critical low water conditions that set in during July and continue into the subsequent period of 2026, cargo and passenger transport volumes will also be reduced in the third quarter of 2026 compared to the corresponding figures in 2025. Under these conditions, the Danube Commission is taking a number of special measures to ensure the safety of fleet operations and to stabilize the Danube shipping market.