GEOGRAPHICAL ASPECTS OF AIR TRANSPORT DEVELOPMENT IN UKRAINE

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Abstract. 21st century brought about significant changes to the way air transport operates in all of the Central and Eastern Europe. The political transformation itself, which took place at the turn of 80s and 90s, opened up a possibility of travel beyond country borders to citizens of Ukraine, Poland and all the other countries of the region. At the same time, air transport was forced to operate under the laws of market economy, which meant exposure to competition. With liberalization and deregulation of this branch of transport sector in majority of European states, begun a period of unprecedented growth dynamics, ended only in 2008.

Introduction. 21st century brought about significant changes to the way air transport operates in all of the Central and Eastern Europe. The political transformation itself, which took place at the turn of 80s and 90s, opened up a possibility of travel beyond country borders to citizens of Ukraine, Poland and all the other countries of the region. At the same time, air transport was forced to operate under the laws of market economy, which meant exposure to competition. With liberalization and deregulation of this branch of transport sector in majority of European states, begun a period of unprecedented growth dynamics, ended only in 2008.

Above factors surfaced in unison with deep changes to the concept of mobility itself. The airplane as a means of travel lost its clout of exclusivity and became accessible for a far greater portion of the society, while frequency of air travel became higher than ever before. Ukraine, along with other emerging markets from the central and eastern part of the continent may be characterized as having the highest air transport growth dynamics. At the same time, it comes face to face with a qualitative and quantitative deficit of infrastructure necessary for maximizing gains from the rapid increase of demand. The main goal of this article is to identify directions which passenger air transport in Ukraine may take, including their spatial preconditions and implications.

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Conditions for growth of air transport in Ukraine. From the demographic standpoint, Ukraine counts among the biggest European aviation markets. Having 45.5 million inhabitants, it holds a great potential, although tapping it is subject to numerous factors. The overall air travel mobility index for Ukraine, defined as the number of passengers to the number of inhabitants amounted to 0.31 in 2011. Both internal and external conditions forecast quick improvement of this result.

While discussing conditions for growth of air transport in Ukraine, one cannot omit the geographical placement of the nation. Thanks to its central location in the Eurasian plane, local airports may serve as transfer hubs of traffic coming from other parts of Europe to Central Asia or to Arab states. A growing international interest in Black Sea tourist resorts and establishment of international economic linkages by Ukrainian cities also positively influence local air transport sector.

Passenger air transport in Ukraine. Following independence of Ukraine, the volume of passenger air transport saw an outright drastic plunge (Figure 1). The lowest figures came at the end of 90’s as a result of an economic crisis Ukraine then experienced. A clear upward trend returned only after 2000. Although it too was hampered by yet another economic crisis resulting in a decrease in number of passengers, momentum was quickly regained and within a short time the volume of air travel saw the best figures to date (at least for the transformation period) and air transport generally returned to the path of dynamic growth.

Figure 1 – Passengers using air transport in Ukraine (1980–2012) in millions
Source: based on data published by http://www.ukrstat.gov.ua/

Geographic aspects of Ukrainian air destinations. Kiev holds a particular potential of being a high ranking Eurasian hub, by having an extensive array of destinations to former republics of the USSR and to the Middle East in its offer, at the same time by being well connected to the western Europe (Figure 2). Thus, it may well function in that role. In the city-centric reality of the world economy (Szymańska 2008), connectivity by air with the most important decision-making
centers is of top priority. Connections with London, Paris, and Frankfurt am Main directly tie Kiev with the network of global-rate cities. Direct connections by air with cities of that status allow for a fast transfer of people and cargo, which in current age of globalization counts among the fundamentals factors of growth.

Figure 2 – Connection grid of selected Ukrainian airports

Source: author’s own elaboration based on timetables published by airports

Further growth of the Zhulhany airport based on extension of its offer to low-fare carriers will translate into inclusion to the list of destinations those from the European network of secondary airports, popular among passengers characterized by different socio-economic behaviors than those choosing traditional carriers. Kiev’s airports are therefore complementing each other and together they form a hub which is open to a wide spectrum of passengers and carriers.
The network of connections offered by Ukrainian airports adopted predominantly a parallel system. A comprehensive offer of flights to Western Europe is counterbalanced by Russian destinations (represented mainly by Moscow, but at the same time to all of its three main airports), connections with Kazakhstan (including its regional airports) and other countries of the region. The meridian system includes flights to the Baltic Republics and Finland; however northern destinations are dominated by flights to the south, such as those to Israel, Lebanon or United Arab Emirates. Egyptian sea resorts gain importance especially during summers, thanks to charter flights.

Regional airports, depending on their location, present a different orientation of their connections. This is well evidenced in cases of Lviv with its domination of western destinations and Donetsk with its domination of north-eastern destinations. In both cases connections with Poland are present – in case of Lviv not only with the central airport in Warsaw, but also with major regional airports.

Expansion of offer with new European Union destinations reflects the demand evidenced by individual destination-country statistics (Figure 3). Most passengers fly on routes to Germany. In the 2001 – 2011 period, the number of passengers travelling between Ukraine, Germany, Poland, Austria and Italy grew at least threefold. Although the global financial crisis had a negative impact on connections with eastern and western parts of Europe, after a short period the volume of travel in majority of destinations returned to their pre-crisis levels. This should also be reflected upon as an indication of their importance.

Figure 3 – Passenger air transport between Ukraine and EU member states

Source: author’s own elaboration based on Eurostat data
Ukraine’s airport system. The growth of air transport does not stop at the overall number of passengers who choose an airplane as a means of travel. It also impacts the necessary infrastructure. The fundamental problem lays not so much in the number of airports, as in their capacity and accessibility.

In Ukraine, three areas of concentration can be distinguished for airports offering regular scheduled flights (Figure 4). Their placement reflects characteristics of the settlement network.

The first area of concentration is created by Kiev’s airports. Reaching the level of 8 million passengers annually, it comes close to volumes of the most important Central European airports such as Warsaw, Prague or Budapest. The second area of concentration is in the eastern and south-eastern part of the country, i.e. regions with the highest urbanization and industrialization. Extending this area towards south-west are the airports servicing the most important cities located on the coast of Black Sea. The third area encompasses western regions of Ukraine, with domination of the dynamically growing Lviv airport which recently saw construction of new terminal in connection with the Euro 2012 football championships.

Capital city’s air transport node dominates Ukrainian structure of passenger air transport (Figure 5). Kiev’s airports handle close to 70% of all passengers. Boryspil’s share has seen a slight decline over the last 8 years. At the same time, in large part due to the presence of low-cost carrier Wizz Air, importance of Kiev–Zhulhany secondary airport grew considerably. This pattern is typical to all multi-airport regions of Europe. Regional airports’ share in passenger air transport does not fluctuate significantly. Experience of Central European countries (e.g. Poland)
shows, that only decisive entry of low-cost carriers on the air transport market may lead to weakening of capital city’s node in favor of regional airports.

Summary. Ukraine’s air transport, due to geographical conditions as well as country’s demographic potential, holds a great promise for further dynamic growth. Country’s location and its socio-economic ambitions are shaping, among other things, geographic characteristics of air transport connections. Continuing rise of interest in air travel will be subject to airline policies and Ukraine’s overall socio economic progress. The fundamental supporting factor should be a further development of infrastructure – including construction of new airports and expansion of those operating currently.

REFERENCES