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## Black Sea descends into danger zone territory again

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The Black Sea has descended into a severe danger zone for merchant shipping with Russian military forces piling into the region and targeting Ukraine's exports.

Having gone all year without any merchant ships coming under attack, another strike yesterday marks the fourth commercial vessel to be hit by Russian forces in the Black Sea in less than a month.

Moreover, the number of Russian naval ships in the Black Sea has doubled in recent days as the full-scale invasion of Ukraine – now approaching its 1,000th day anniversary – enters a new phase at sea.

Ukrainian foreign minister Andrii Sybiha on Monday denounced Russian missile attacks on two vessels in its southern ports as a “deliberate terrorist tactic”.

“In just two days, Russian ballistic attacks damaged two civilian cargo vessels in Odesa.....” Sybiha wrote on X.

“This is a deliberate terrorist tactic. We must join forces of all responsible states and organisations to...ensure freedom of navigation in the Black Sea and global food security.”

Russia targeted a ship loaded with Ukrainian grain with a ballistic missile yesterday killing one person and injuring five, according to the infrastructure ministry in Kyiv.

The *Optima*, which sails under the flag of Palau, was damaged in an Odesa regional port shortly after it docked for loading

Ukraine’s deputy prime minister Oleksiy Kuleba said Russia “is attempting to destroy shipping in the Black Sea guaranteeing food security.”

Another bulker loaded with Ukrainian grain for export was damaged Sunday during a Russian missile barrage in the Odesa region. The *Paresa*, sailing under the flag of Saint Kitts and Nevis, was struck with Russia’s claims it was carrying ammunition to Ukraine refuted by Kyiv. The ship had 6,000 tons of corn on board, Ukrainian authorities said yesterday.

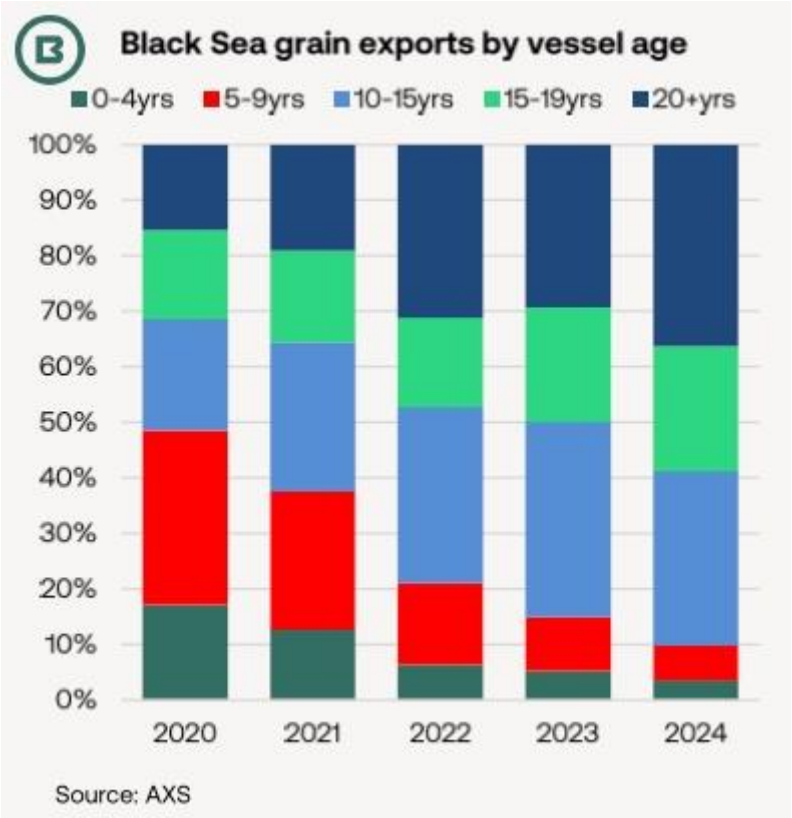
Two other strikes damaged merchant ships last month, including one near Romania’s shoreline which earned a stiff rebuke from Bucharest.

Since July 2023, when the United Nations-brokered Black Sea Grain Initiative fell apart, Ukraine has managed to create an export corridor that sees vessels leave the ports of Odesa, Chornomorsk and Yuzhny to go either via the Danube or hugging the coastlines of Bulgaria and Romania to head to international markets.

Prior to these recent strikes, Ukraine’s grain exports had been running at their fastest pace since the beginning of the conflict with Russia.

Through to September 11 this year there had been no strikes on merchant ships in the region all year, with volumes along this export channel surpassing the volumes of the earlier UN version.

Analysis from broker Braemar shows that grain exports from the Black Sea have seen a considerable shift in age profile, with older vessels predominating.



The share of bulkers aged 20+ years has expanded to more than a third this year from around 15% in 2020, the majority small handysizes of 20,000 to 34,900 dwt and older panamaxs.

Conversely, bulkers of less than 10 years of age have seen their market share in this trade slump from almost half in 2020 to just 10% over the last five years.

Also of note in dry bulk trades in the region, having disappeared off the map for the first year and a half of the full-scale invasion, Ukrainian seaborne iron ore exports, primarily on capesizes, have shown a notable rebound in 2024. Ukraine's exports in the first nine months of the year stood at approximately 11.27m tonnes, already representing almost 424% of the total figures for 2023 and 315% of the total for 2022.

While Russia has been far more aggressive in the Black Sea in recent weeks, Ukraine is not holding back, however, continuing its own maritime campaigns. In recent days, Ukraine has managed to sabotage a Russian minesweeper based in the exclave of Kaliningrad, while also setting an oil depot on fire in Crimea's Feodosia region. The Feodosia terminal, which also came under attack in March this year, is the largest in Crimea for handling oil products, with only one other terminal of its kind located in Sevastopol.

