

## PECULIARITIES OF LOGISTICS DEVELOPMENT IN GEORGIA

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**Methods.** This study is based on a comprehensive analysis of the National Transport and Logistics Strategy of Georgia (2023–2030), analytical reports prepared by TBC Capital, the World Bank, and other international organizations, as well as recent scientific publications on logistics, transport systems, supply chain management, and regional economic development. The research combines quantitative and qualitative methodological approaches to ensure a comprehensive assessment of Georgia's logistics sector. Statistical analysis was applied to evaluate key logistics performance indicators and transport dynamics, while expert evaluation was employed to identify the main strengths, weaknesses, opportunities, and challenges of the national logistics system. Forecasting methods were used to assess future development trends of the logistics industry, particularly in relation to the Middle Corridor and regional transport integration.

**Results.** The research demonstrates that Georgia possesses substantial potential to strengthen its role as a regional logistics hub owing to its strategic geographical location at the intersection of Europe and Asia. The country's logistics development is supported by ongoing infrastructure modernization, digital transformation of customs procedures, implementation of international transit standards, and increasing integration into global supply chains. At the same time, several challenges remain, including infrastructure capacity constraints, uneven logistics service quality, limited multimodal transport integration, and the need for further digitalization of logistics operations. The study identifies the key factors influencing logistics performance and highlights strategic priorities for improving transport connectivity, enhancing customs efficiency, and increasing the competitiveness of Georgia's logistics sector.

**Novelty.** The scientific novelty of the study lies in the comprehensive evaluation of Georgia's logistics development through the integration of strategic, institutional, operational, and financial perspectives. The research simultaneously examines the implementation of the National Transport and Logistics Strategy (2023–2030), the country's performance according to the Logistics Performance Index (LPI), the adoption of the New Computerized Transit System (NCTS), the development prospects of the Middle Corridor, and the role of management accounting and financial management in improving logistics efficiency.

**Practical value.** The findings confirm that Georgia is steadily reinforcing its position as one of the most important transit countries within the East–West trade corridor and possesses significant opportunities to expand its role in international logistics networks. The recommendations developed in this study may be applied by government institutions, transport authorities, logistics operators, freight forwarding companies, investors, and international organizations to improve logistics infrastructure, optimize transport management, strengthen multimodal transport systems, accelerate digital transformation, and enhance the country's competitiveness in the global logistics market.

**Keywords:** logistics; transport; supply chain management; logistics performance; Middle Corridor; transit infrastructure; transport policy; digital logistics; New Computerized Transit System (NCTS).

**Statement of problem.** In the modern world, supply chain sustainability and its national security implications have become a major concern. These concerns are often related to supply chain security, including cybersecurity, which is a key issue in the highly digitalized and globally connected service industry [2]. According to the National Transport and Logistics Strategy of Georgia for 2023–2030, despite the improvement of transport infrastructure, customs procedures and logistics potential, the country still faces significant challenges, including the modernization of logistics infrastructure, improving service quality, effective supply chain management and the development of qualified human resources [1].

Georgia's geopolitical location has been important for the existence of transport routes since ancient times. The most important caravan routes passed here: from east to west, from north to south. Along with the growth of the economy, Georgia's function as a Transcaucasian corridor has expanded. It is the shortest route connecting East Asia with Europe. Significant railway, road and pipeline transport passes through the territory of Georgia – using them, it is possible to transport goods cheaply and efficiently, from the Caspian to the Black Sea and vice versa. The Georgian maritime corridor was also actively used by Iran in the eighteenth and nineteenth centuries, which, even after the subjugation of the Caucasus by the Russian Empire, retained the possibility and privileges of cargo turnover through the territory of Georgia. It is expected that in the event of an appropriate political climate, the issue of Iran's use of the Georgian transit route will again arise, which will further increase the importance of Georgian seaports. It should be noted that for the countries of Central Asia, cargo turnover is still mostly carried out by Russia, which is determined by many artificial and, rather, natural factors. Such, first of all, is the well-developed pipeline and rail transport network between the countries of Central Asia and Russia [4]. Given the continuous growth of infrastructure investments, transit traffic and our geographical advantages, the transport and warehousing sector is growing every year. Along with the positive results of development, financial management shortcomings are emerging, which are harming thousands of

companies[7]. The field of international transportation is facing fundamental changes in 2026. Changing global trade routes, the introduction of digital technologies and the launch of new railway corridors - all this directly affects the cost, speed and reliability of cargo transportation [3].

**Analysis of recent papers.** In recent years, a number of changes have occurred in developed countries, which are primarily associated with the introduction of new technologies for the delivery of goods into economic practice and are based on the development of material and technical support, transport, as well as the latest technological means. Such a concept of integration using information systems has received the name 'logistics. According to the European Logistics Association (ELA), logistics (in a broad sense) is the planning, organization, implementation and control of the movement of material and its corresponding flows from the moment of purchase, including production and goods movement (transportation and warehousing), to the final consumer, in order to better meet market requirements, with minimal costs and rational use of resources. The use of logistics makes it possible to successfully solve problems of any level related to material and information flows. In particular, these are: the layout and development of a production and warehouse network in the service sector, the development of a rational direction of material flow and the definition of a strategy, the construction and complex management of a logistics chain, the determination of transportation and warehouse volumes, the selection of delivery facilities for raw materials and materials, semi-finished products and finished products, the organization of transport and transport processes, the creation of an information system for their management[8]. In recent years, interest in the sector has increased in line with the increased demand for transportation and warehousing in the country – in response to this trend, TBC Capital has prepared a publication that analyzes the opportunities and challenges created by local and global trends. The study discusses Georgia's transit function and the competitiveness and potential of the Middle Corridor, a transport route connecting the markets of Europe and Central Asia through Georgia.

Georgia's Logistics Sector. According to the study, Georgia's transport and warehousing sector is growing steadily – in 2024, growth of approximately 9% was recorded, and the sector's share in GDP was 5.9%. The logistics sector was positively affected by increased trade flows between Europe, the Caspian region, Central Asia and China. Since 2015, the cargo turnover of the transport sector has also been growing steadily. The positive dynamics will continue in the coming years – TBC Capital predicts a 5.5% growth in 2025–2028, the main factors being the growth of domestic demand and exports, as well as the activation of Central Asian trade flows. The growth of transportation has also increased demand in the warehousing sector. According to TBC Capital, the trend will continue – against the background of the growth of local and transit cargo turnover, the demand for warehousing services will increase by an average of 9% in 2025–2028. Currently, the total area of warehouses in Georgia is 2.2 million sq.m., the main part of which – 90% – is dry, and 10% – is refrigerated warehouses. It is important that 67% of warehouses are used by the owner, and 33% are leased. The average lease price per square meter varies within \$ 3–\$ 6 (excluding VAT and service fees), and in the case of class A warehouses this figure is \$ 7–\$ 8.

Transit corridors – challenges and opportunities. The launch of the Zangezur transit corridor, which creates an alternative route connecting Central Asia and Europe in the Caucasus, will be important for the countries of the region and the logistics sector of Georgia. In the short term, the diversion of cargo flows to the Zangezur corridor is unlikely, but in the medium term, part of the Azerbaijan-Turkey and Turkey-Central Asia cargo flows may be distributed from Georgia to the Zangezur corridor.

The Middle Corridor, which connects the markets of Europe and Central Asia via Georgia, has become more relevant given the geopolitical situation. According to the study, the corridor is strategic, but less competitive than alternative corridors in terms of throughput, time and costs. The main challenge is the insufficient throughput

of the infrastructure and the complexity of administrative and customs procedures. In order to respond to the challenges and improve the potential of the Middle Corridor, various infrastructure projects are planned in the coming years, both in Georgia and in other countries of the corridor. As a result, the throughput capacity of the Middle Corridor is expected to double, increasing from 6 million tons to 12 million tons. According to TBC Capital estimates, by 2030, the economic development of the Middle Corridor countries will almost fully absorb the potential of the corridor [7].

**Materials and methods.** The research methodology is based on an interdisciplinary approach that combines economic theory and economic research. The study uses comparative-analytical and statistical analysis. Materials for the period 2015–2026 are reviewed. The National Transport and Logistics Strategy of Georgia for 2023–2030 is analyzed, where the following steps are performed based on the situational analysis:

- Searching for and processing information on existing studies and reports;
- Statistical analysis;
- Surveying key players in the market;
- Initial identification of challenges;
- Holding discussions with market participants and businesses;
- Analysis of international practices and approaches [1].

The existing research and modern theoretical and empirical sources surrounding the work are discussed. The World Bank study is analyzed. Based on the current situation, primary and secondary sources were processed according to the Ministry of Economy and Sustainable Development of Georgia and the European Logistics Association (ELA). The Georgian logistics index is compared with the indices of various countries – for the period before and after 2023. Based on the data, an appropriate forecast is made using the expert assessment method.

**Results and Discussion: Current Situation and Challenges in the Logistics Sector.** The Georgian logistics sector is in the process of transformation. The emergence of new international players in the Georgian market and the expansion of existing players

are observed. The World Bank studies the Logistics Performance Index (LPI) every four years. The LPI is an international rating with six assessment criteria, which covers the most important issues of the efficiency of the logistics of countries. These criteria are:

- Customs – the efficiency of border crossing procedures and customs clearance;
- Infrastructure – the efficiency of the infrastructure related to logistics and transport;
- International shipments – the ease of organizing international transport shipments with competitive prices;
- Logistics competence – the quality and competence of logistics services;
- Traceability and tracking – the ability to track and trace shipments;
- Time – an indicator of the timely delivery of cargo within the planned time.

The Logistics Index reflects the view of international service providers and business operators on how countries are integrated into the global logistics network through their main trade «gateways». Therefore, it reflects not only changes occurring within the country, but also problems related to accessibility outside the country. For example, border crossing issues with neighboring countries. According to recent data, Georgia has improved in all components (customs, international transportation, logistics competence, traceability and time) except for infrastructure. In this regard, it is worth noting that over the past decade, Georgia has made large investments in the development of road infrastructure, however, logistics and intermodal infrastructure remains underdeveloped compared to developed countries, which leads to low efficiency of operation of the logistics system, high cost and relatively low reliability of the system. High costs have a negative impact on international transportation, which is also reflected in the LPI index estimates. According to the 2023 LPI index, Georgia's logistics efficiency index (2.7 points overall) lags behind the average for the Europe and Central Asia region (3.01 points). Thus, despite the progress made, the competitiveness and efficiency of Georgia's

logistics sector still remains low. The current situation is caused by the following main factors:

- Outdated logistics infrastructure and low level of automation of logistics processes;
- Low quality of logistics services
- Insufficient knowledge of supply chain management;
- Weak regulatory framework for the logistics sector.

The Georgian logistics sector is largely unregulated. 3PL service providers, warehouse operators, freight forwarders, inventory management companies, etc. They are created and operate in the complete absence of a regulatory framework. In particular:

- There are no accreditation procedures for the logistics workforce;
- Local spatial development plans are not taken into account in the decision-making process on the selection and placement of logistics facilities.

Technical standards for buildings and warehouses exist, although national legislation considers them similar to production activities; therefore, technical regulations established for warehouse buildings and structures represent general construction standards and do not take into account conditions adapted to logistics processes. Ultimately, the above-mentioned factors lead to the inefficient functioning of the sector, which is also reflected in logistics costs. Logistics costs of Georgian companies average 15-20% of total revenues, which significantly exceeds the benchmark in international practice. For example, in the EU countries, the average logistics costs for the production of consumer goods are 5% of the revenues received, in the automotive industry – 4%, and in the production of electrical equipment – 6%. The increased costs of transportation and distribution in Georgia are due to the lack of consolidation and deconsolidation operations, low productivity of logistics assets and inefficient use of rolling stock. Another reason for high logistics costs is high warehousing costs, which, as mentioned, is the result of

unsatisfactory supply chain management practices.

The attractiveness of the Middle Corridor is determined by the location of large transport and logistics centers throughout the country and the presence of terminals for collecting and distributing transit cargo. In fact, the country has a “2023–2030 Transport and Logistics Strategy”, but the document approved by the government does not contain any specifics about the location, specifics and investment capacity of logistics centers in Georgia. This is the main drawback of the mentioned strategic document. As a result, the country has the ambition to become a logistics center in the region, but so far it has not been able to build large, financially viable logistics infrastructure projects.

According to the latest World Bank survey of 2023, among 138 countries, Georgia is a country with partial logistics capabilities – its index is 2.7, which is far behind the indices of countries with improved capabilities (3.2 – 3.6). According to the most important sub-component of the logistics index, which determines infrastructure, Georgia ranks 108th among 138 countries with a score of 2.3. Georgia, in the infrastructure subcomponent, lags behind almost all countries in the region, for comparison – Turkey – 43rd level, Armenia – 76th level, Kazakhstan and Tajikistan – 80th level, Belarus and Russia – 68th level, Uzbekistan, Kyrgyzstan and Ukraine – 89th level. One of the reasons is the lack of financial resources and investments in large logistics and infrastructure projects. It should be noted that there were some attempts to create large logistics facilities in the country: in 2017, the Georgian government announced two regional investment projects worth a total of \$153 million – the development of logistics centers in Kumasi and Kutaisi near Tbilisi. According to the pre-prepared feasibility study, the winner was to be identified during 2018, construction was to begin within 18 months of signing the investment contract and be completed within 5 years. One of the reasons for the non-implementation of the logistics center project was the suspension of related large-scale projects, including, first of all, the Anaklia port and railway modernization projects, since only

with the launch of these projects and, accordingly, in the conditions of generating cargo flows, would the development of logistics centers have real prospects. An exception should be made for the Tbilisi Dry Port, which is being built with foreign investments and is considered an important logistics hub. The world-famous port operator AD Ports Group of the United Arab Emirates, together with the company Inveco, purchased a controlling stake in the Tbilisi Dry Port in 2024. The dry port's capacity will reach 300,000 TEU. The total investment package is worth \$50 million, with \$20 million invested in the first phase at the current stage [6]. In 2024, the logistics sector in Georgia is expected to exceed GEL 10 billion (annual growth: 8.5%). The sector employs approximately 64,000 people, and the average monthly wage for those employed is GEL 2,350. Currently, more than 5,200 companies operate in the transport and warehousing sector in Georgia. The sector is highly fragmented and largely represented by micro and small businesses (98.3% of the total), which often lack proper financial accounting and process control.

**The sector is growing, but financial discipline is lagging.** Many small and medium-sized logistics companies still use old methods of financial and management accounting. They do not separate costs into direct and indirect categories, do not assess profitability at the location, route or customer level, do not take into account asset depreciation and/or do not analyze profitability by cargo type. As a result, companies incorrectly determine the price of services, often serve loss-making destinations, or fail to notice the potential of profitable lines. Many companies still rely on basic accounting, which serves only tax compliance. Management accounting – a mechanism that provides detailed analysis of costs, profitability, productivity and operational risks – is either non-existent or poorly developed. Delayed or incomplete financial or management information leads to cash shortages, misinvestments and ultimately – the accumulation of hidden losses.

**Regulations and Compliance: New Challenges for Logistics.**

Increasing regulatory requirements are increasingly burdening companies operating in the sector. One of the most important innovations is the introduction of the NCTS

(New Computerized Transit System), which involves the electronic management of transit operations in accordance with EU standards.

**The implementation of NCTS involves**

- Automation of the processes of transit confirmation, monitoring and completion,
- Synchronized data exchange with customs in real time,
- Detailed accounting of data for each transit shipment and its correct reflection in the NCTS system;
- A sharp increase in insurance and financial costs,
- Strict regulation of compliance control.

This process has significantly increased the demand for accuracy and timeliness of accounting and operational documentation. Examples of low efficiency indicators in the transportation and logistics sector:

**• Inefficient route planning:**

Several vehicles sent to parallel destinations with incomplete loads (for example, vans 40% full), which leads to a waste of fuel and labor resources.

**• Fuel consumption variation:**

Fuel consumption for shipments carried out by different drivers on the same route varies from 23 l / 100 km to 35 l / 100 km, which indicates the lack of control over fuel consumption and financial losses. Management cannot control either the behavior of drivers or the technical condition of trucks.

**• Chaotic management of subcontractors:**

On the same route, one subcontractor carries out shipments for 800 GEL, and another for 1,300 GEL without a clear difference in quality; the lack of contract management leads to losses.

**• Delayed delivery of cargo:**

A delay of 18 hours or more is recorded in every 5th shipment, which leads to customer dissatisfaction, sanctions or customer outflow

**• Warehouse losses:** Due to improper warehouse accounting, 5–6% of the warehouse balance is regularly lost or damaged per quarter, which is also a generator of losses.

**• Negative depreciation strategy for equipment:** Maintaining an old fleet with high repair costs (e.g., repair costs for 2 years exceed the market value of the asset and its replacement cost), but the right decision cannot be justified

because the profitability analysis of the vehicles has not been conducted. **Low productivity of labor resources:** One employee processes only 4 deliveries per week, while the industry average is 6–7. Since the productivity indicator is not measured, decisions are made intuitively. **Inaccurate profitability assessment:** The company believes that a particular route is profitable because its turnover is high, but a detailed management analysis shows that the route's costs exceed its profitability. **Why accounting and management accounting play a decisive role in the logistics business.**

In modern business, especially in the logistics sector, where the operational process is complex and daily costs are high, accounting and management accounting perform not only a technical task, but also a function of implementing a competitive strategy. It is necessary for management not only to know the company's total profit or annual turnover, but also to accurately determine. Which service is actually profitable. Which route relies on subsidies. What profit is generated by each lari spent on warehouse space. Where money is lost [ 7 ].

Effective logistics are crucial for the growth and success of any business. Logistics is closely related to business, as it involves the management of information flows related to procurement, processing, and exchange. Service logistics is a key element that affects the quality of supply chain operations. As businesses expand, the need for well-organized delivery and advanced logistics becomes more vital.

The global economy is largely powered by logistics, which faces challenges such as high transportation costs, time management, improved customer service, and supply chain visibility. Translive is a digital logistics platform developed by Kairos Logistics, Bene Group, and Lemondo in partnership with Georgia to address these challenges. The main focus of its creation was on creating a simple, fast, streamlined logistics process with an efficient supply chain [ 9 ].

It is important that today, despite the existing contradictions, the Georgian government is trying to resolve the problems of the Middle Corridor and establish partnership relations with neighboring countries. The projects implemented in Georgia recently are an

example of this. Georgia and Turkey closely cooperate in the field of transport and logistics, which is of particular importance in the context of the development of the Middle Corridor. «Today, Georgia and Turkey are not only neighbors, but also partners who actively cooperate for regional development, stability and economic progress. Turkey is one of the most important trading partners for Georgia – in 2024, bilateral trade turnover exceeded 3 billion USD, which clearly indicates the close integration of our economies».

«The Georgian government pays significant attention to the development of the private sector, improving transport and renewable energy capabilities, maintaining a predictable business environment, and promoting the attraction of foreign direct investment. It is worth noting that over the past five years, Turkey has been regularly increasing its investments in Georgia, and in general, our countries have very close trade and economic relations» – (Minister of Economy and Sustainable Development, Mariam Kvrivishvili) [10].

On June 3, 2026, an agreement was signed to open the Baku-Tbilisi-Kars railway, which was initially opened in 2017 and, according to officials, has been operating in «test mode» to this day, covering approximately 850 kilometers, of which 180 kilometers pass through Georgia. After full operation, its annual throughput capacity will increase from 1 million to 5 million tons. The Georgian government attaches great importance to the Baku-Tbilisi-Kars project: «The Central Corridor is of particular importance in the connectivity of Europe and Asia and brings Europe and Asia closer together, strengthens the strategic importance of our region in the global trade and logistics network, and further enhances the competitiveness of the Central Corridor» [11].

**Conclusions.** The study showed that Georgia has a high potential for logistics development. There are problems that can be solved with the right strategy. The basis for this is the high interest in Georgia as a strategic logistics partner. The issues discussed in the study showed that logistics is one of the most important directions of Georgia's economic development, international trade and regional integration. The favorable geographical location

of the country, which serves as a transit corridor between Europe and Asia, creates important prerequisites for the development of the logistics sector.

The study revealed that the infrastructure projects implemented in Georgia in recent years, the modernization of the transport network, the simplification of customs procedures and the strengthening of international cooperation have a positive impact on the efficiency of the logistics system. At the same time, challenges still remain, such as:

- Lack of modern warehouses;
- Insufficient introduction of digital technologies;
- Shortage of qualified personnel;
- The need for further development of transport infrastructure.

**Recommendations:** To increase the competitiveness of the logistics sector, it is important to:

- Introduction of international standards and support for the development of human resources;
- Development of intermodal logistics centers;
- Introduction of ERP/WMS/TMS systems;
- Use of AI in routing;
- Development of green logistics;
- Expansion of PPP projects;

These measures will contribute to the full use of Georgia's transit potential, increased competitiveness in international markets and the country's economic development.

In summary, it can be said that the effective development of logistics for Georgia is an important factor not only in the development of the transport sector, but also in economic growth, attraction of investments and deepening of international trade relations. Accordingly, the implementation of a consistent state policy in this direction and the active involvement of the private sector are one of the necessary conditions for the sustainable development of the country. The results of the study can be used as a basis for state strategic planning, managerial decisions of logistics companies, and future academic research.

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**ОСОБЛИВОСТІ РОЗВИТКУ ЛОГІСТИКИ В ГРУЗІЇ**

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**Методологія дослідження.** Це дослідження базується на комплексному аналізі Національної транспортно-логістичної стратегії Грузії (2023–2030), аналітичних звітах, підготовлених TBC Capital, Світовим банком та іншими міжнародними організаціями, а також нещодавніх наукових публікаціях з логістики, транспортних систем, управління ланцюгами поставок та регіонального економічного розвитку. Дослідження поєднує кількісні та якісні методологічні підходи для забезпечення комплексної оцінки логістичного сектору Грузії. Статистичний аналіз було застосовано для оцінки ключових показників ефективності логістики та динаміки транспорту, тоді як експертна оцінка була застосована для визначення основних сильних і слабких сторін, можливостей і викликів національної логістичної системи. Методи прогнозування були використані для оцінки майбутніх тенденцій розвитку логістичної галузі, зокрема стосовно Середнього коридору та регіональної транспортної інтеграції.

**Результати.** Дослідження демонструє, що Грузія має значний потенціал для посилення своєї ролі як регіонального логістичного центру завдяки своєму стратегічному географічному розташуванню на перетині Європи та Азії. Розвиток логістики країни підтримується постійною модернізацією інфраструктури, цифровою трансформацією митних процедур, впровадженням міжнародних транзитних стандартів та зростаючою інтеграцією у глобальні ланцюги поставок. Водночас залишається кілька проблем, зокрема обмеження потужностей інфраструктури, нерівномірна якість логістичних послуг, обмежена інтеграція мультимодальних перевезень та необхідність подальшої цифровізації логістичних операцій. У дослідженні визначено ключові фактори, що впливають на ефективність логістики, та висвітлено стратегічні пріоритети для покращення транспортного сполучення, підвищення ефективності митниці та підвищення конкурентоспроможності логістичного сектору Грузії.

**Новизна.** Наукова новизна дослідження полягає у комплексній оцінці розвитку логістики Грузії шляхом інтеграції стратегічних, інституційних, операційних та фінансових перспектив. У дослідженні одночасно розглядається впровадження Національної транспортно-логістичної стратегії (2023–2030), показники країни згідно з Індексом ефективності логістики (LPI), впровадження Нової комп'ютеризованої транзитної системи (NCTS), перспективи розвитку Середнього коридору та роль управлінського обліку та фінансового менеджменту у підвищенні ефективності логістики.

**Практична значущість.** Результати дослідження підтверджують, що Грузія неухильно зміцнює свої позиції як одна з найважливіших транзитних країн у торговельному коридорі Схід-Захід та має значні можливості для розширення своєї ролі в міжнародних логістичних мережах. Рекомендації, розроблені в цьому дослідженні, можуть бути застосовані державними установами, транспортними органами, логістичними операторами, експедиторськими компаніями, інвесторами та міжнародними організаціями для покращення логістичної інфраструктури, оптимізації управління транспортом, зміцнення мультимодальних транспортних систем, прискорення цифрової трансформації та підвищення конкурентоспроможності країни на світовому ринку логістики.

**Ключові слова:** логістика; транспорт; управління ланцюгами поставок; логістична ефективність; Середній коридор; транзитна інфраструктура; транспортна політика; цифрова логістика; Нова комп'ютеризована транзитна система (NCTS).

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