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Russia Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Russia Freight and Logistics Market size is estimated at USD 88.38 billion in 2024, and is expected to reach USD 108.78 billion by 2029, growing at a CAGR of 4.24% during the forecast period (2024-2029).

Rising infrastructure development improving goods supply in Russia, led by demand from ecommerce market

- The demand for transportation of goods surged in 2021 compared to 2020 from various regions. For instance, in Transbaikalia, it increased by 152%, in Primorye by 134%, in the Amur Region by 111%, and in the Khabarovsk Territory by 79%. In general, the increase in rates across the country was less sharp than the growth in demand, but still quite significant. The main driver of demand was the exponential growth of e-commerce and the delivery segment. Russia's leading e-commerce companies announced impressive results for 2021, continuing their rapid growth since the start of COVID-19. Russia's online retail market expanded by 40% over the year.
- Regarding sea transportation, the loading of cargo in containers continued to pick up the pace. In the first half of 2021, compared to 2020, the growth was almost 12% or 0.2 million tons. In total, 1.7 million tons were shipped during that period. With a slight improvement in the economy and increased production of oil, the domestic road freight market for oil, gas, mining, and quarrying resiliently grew by 12.69% YoY in 2021. However, the international segment declined again by 7.52% YoY.
- Infrastructure development has been improving the supply of goods in the country. In 2020, the total amount of money invested in road transport infrastructure in Russia amounted to approximately USD 9.69 billion. The largest amount of investments in road transport infrastructure was recorded in 2008, at a total of over USD 9.75 billion. The total investment value in inland transport infrastructure in Russia decreased to USD 12.34 billion in 2020. That constitutes a decline of USD 1.12 million from the previous year, when it stood at USD 13.43 billion.

Russia Freight and Logistics Market Trends

Russia's transportation storage dominates road transport, with over 1.1 billion metric tons goods load moved in 2022

- In 2021, land and pipeline transport activities accounted for a major share of GDP (contributed 63%). In contrast, warehousing and auxiliary transport activities contributed to the transport and storage sector's GDP, contributing around 27% in 2021. Water, air, and postal courier activities accounted for 2%, 5%, and 3%, respectively, of the transport and storage sector's GDP in 2021. However, the EU sanctions, which are directed at the Russian economy, negatively impacted Russia's ability to sustain its military operations and impact the European Union. Passenger air travel was significantly impacted by the closure of Ukrainian airspace and the sanctions imposed on Russian aircraft.
- In 2021, Russia's GDP growth was 4.7%. In the same year, production increased in almost all sectors of the economy. In 2022, the manufacturing industry's contribution to GDP was 14.45%. All manufacturers depend on transportation to get the raw materials required for their products. The Russian invasion of Ukraine has also damaged transport infrastructure, causing major transport disruptions and leading to a massive flow of refugees into the European Union and neighboring countries.
- The road transportation sector took the forefront, moving an impressive load of over 1.1 billion metric tons during the first quarter of 2022. In this timeframe, logistic enterprises in the Central Federal District excelled, overseeing the transportation of almost 14.3 million metric tons of goods via roads, securing its position as the primary region for road freight in the initial quarter of 2022. FMCG and small industrial products were the dominant categories of goods transported.

G7 nations have set an oil price cap for crude oil of USD 60 per barrel, enforced from December 2022

- According to the Russian Economy Ministry, prices for Russian natural gas for consumers outside the CIS countries rose by 72% to USD 523.3 per 1,000 cm3 in 2022. Russia's gas exports were 10% lower in 2022, at 185 billion cm3. Russia's gas output fell to 721 billion cubic meters in 2022, down from 764 billion cubic meters in 2021. Over 70% of Russian-produced oil is exported. Around 1,100m barrels of crude oil were exported by ship in 2021 and 1,400m in 2022, with 75% leaving from western and 25% from eastern ports.
- Consumer prices for gasoline in the Russian Federation in 2021 increased by 8.84%, exceeding the rate of general inflation, which was 8.39% at the end of 2021. In December 2021, gasoline prices rose by 0.85% compared to November 2021. Diesel fuel prices increased by 1.9% in December 2021 compared to November. Prices for gas motor fuel decreased by 5.4%. The government aims to raise consumer gasoline prices within the limits of inflation, and the goal is also to be followed by gas station networks across the country. However, wholesale price growth in 2021 set new records, resulting in a yearlong disparity between wholesale and retail prices.
- The G7 nations have set an oil price cap for crude oil of USD 60 per barrel, which occurred in December 2022. The average price for Russian crude oil in January 2023 was USD 49.48 per barrel, down 42% in January 2022 prices and well below the USD 60 per barrel price cap. Russia issued a decree applicable from February 2023 until July 2023, which banned the sale of crude oil and finished oil products to any country or company that, directly or indirectly, referred to the price cap in the contract. The average price of diesel in Russia during May-August 2023 was RUB 59.40 (USD 0.811).

Russia Freight and Logistics Industry Overview

The Russia Freight and Logistics Market is fragmented, with the top five companies occupying 16.36%. The major players in this market are DB Schenker, Delo Group, FESCO Transportation Group, Sovtransavto and Volga-Dnepr Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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