

## **Russia Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Russia Courier, Express, and Parcel (CEP) Market size is estimated at 3.21 billion USD in 2025, and is expected to reach 3.76 billion USD by 2030, growing at a CAGR of 3.21% during the forecast period (2025-2030).

Shifting consumer preference towards e-commerce largely due to Russia Ukraine war are driving growth

- CEP value in 2022 was affected by residue impacts of the Russia Ukraine war. Demand from various e-commerce segments during H1 2022 created a rise in volumes. For instance, electronics and household appliances accounted for 22% of the total volume, followed by furniture and home goods at 17.7% and fashion at 13.9% in H1 2022. The growth was largely driven by domestic e-commerce, which rose by 50% on a YoY basis. With the country reeling from the impact of the Russia-Ukraine War and the expected increasing demand from e-commerce, the segment registered restrained growth.
- The e-commerce industry is expected to be the major driving force for the domestic and international CEP market. For instance, the number of e-commerce users is expected to reach 75.4 million by 2027 due to a rise in demand. The international CEP market is expected to grow as international retailers aim to capitalize on cross-border e-commerce opportunities. To achieve this, foreign retailers are working on providing localized content via language translations on e-commerce platforms, as English proficiency is low in comparison to Russian.

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### Rising trade with China leading to new infrastructure construction and overall economic development

- In July 2024, the Russian government announced ambitious plans to develop an international transport corridor (INSTC) with a seamless railway connection from the Baltic and Barents Seas to the Indian Ocean. This corridor could reduce transit times from around 45 days (via the Suez Canal) to about 25 days, and cut freight costs by up to 30%. The project aims to create a comprehensive transport network connecting northern Europe to the Persian Gulf and the Indian Ocean, with railway links across Russia and possibly through other countries to reach these key waterways.
- In May 2024, Russia announced plans to open its first liquefied petroleum gas (LPG) terminal on the Pacific Ocean coast, with joint investments from China, by the end of 2025. The Russian Direct Investment Fund (RDIF) partnered with Chinese petrochemical company Haiwei to finance the terminal in Russia's Far East for shipping LPG. The deal involves investing 7 billion roubles (USD 95.61 million) in the terminal, which will have an annual capacity of 1 million metric tons. Overall investments are expected to total around 30 billion roubles (USD 409.74 million).

### Rising Petrol and Diesel prices witnessed after drone strikes by Ukraine on Russia in April 2024

- In April 2024, a series of Ukrainian drone strikes on oil refineries deep within Russia have forced the country to focus on defending its own territory while continuing the war with Ukraine. These attacks have led to an unexpected consequence, Russia, the world's largest oil producer, is now facing a petrol shortage. Diesel prices for Russian consumers surged nearly 10% in the last week of April, and petrol costs have reached a six-month high, rising more than 20% since the start of 2024 as supply tightens and more facilities are forced to halt production.
- Heavy fighting near Sudzha, where Russian gas flows into Ukraine, has raised concerns about a sudden halt to gas transit before the Gazprom deal ends in late 2024. Ukraine does not plan to renew the deal. In 2023, Russian gas transit through Ukraine to Europe dropped by 28.5%, from 20.5 billion cubic meters (bcm) in 2022 to 14.65 bcm. If exports are halted, Russia could lose around USD 4.5 billion annually, based on a projected average gas price of USD 320 per 1,000 cubic meters in 2025. Currently, Russia exports over 40 million cubic meters of gas per day to Europe through Ukraine.

### Russia Courier, Express, and Parcel (CEP) Industry Overview

The Russia Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the major five players in this market being Delovye Linii Group, Express Tochka Ru, Russian Post, SDEK-Global LLC and Yandex (sorted alphabetically).

#### Additional Benefits:

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

#### **Table of Contents:**

##### 1 EXECUTIVE SUMMARY & KEY FINDINGS

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## 2 REPORT OFFERS

## 3 INTRODUCTION

### 3.1 Study Assumptions & Market Definition

### 3.2 Scope of the Study?

### 3.3 Research Methodology

## 4 KEY INDUSTRY TRENDS

### 4.1 Demographics

### 4.2 GDP Distribution By Economic Activity

### 4.3 GDP Growth By Economic Activity

### 4.4 Inflation

### 4.5 Economic Performance And Profile

#### 4.5.1 Trends in E-Commerce Industry

#### 4.5.2 Trends in Manufacturing Industry

### 4.6 Transport And Storage Sector GDP

### 4.7 Export Trends

### 4.8 Import Trends

### 4.9 Fuel Price

### 4.10 Logistics Performance

### 4.11 Infrastructure

### 4.12 Regulatory Framework

#### 4.12.1 Russia

### 4.13 Value Chain & Distribution Channel Analysis

## 5 MARKET SEGMENTATION (includes Market Value in USD, Forecasts up to 2030 and analysis of growth prospects)

### 5.1 Destination

#### 5.1.1 Domestic

#### 5.1.2 International

### 5.2 Speed Of Delivery

#### 5.2.1 Express

#### 5.2.2 Non-Express

### 5.3 Model

#### 5.3.1 Business-to-Business (B2B)

#### 5.3.2 Business-to-Consumer (B2C)

#### 5.3.3 Consumer-to-Consumer (C2C)

### 5.4 Shipment Weight

#### 5.4.1 Heavy Weight Shipments

#### 5.4.2 Light Weight Shipments

#### 5.4.3 Medium Weight Shipments

### 5.5 Mode Of Transport

#### 5.5.1 Air

#### 5.5.2 Road

#### 5.5.3 Others

### 5.6 End User Industry

#### 5.6.1 E-Commerce

#### 5.6.2 Financial Services (BFSI)

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- 5.6.3 Healthcare
- 5.6.4 Manufacturing
- 5.6.5 Primary Industry
- 5.6.6 Wholesale and Retail Trade (Offline)
- 5.6.7 Others

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
  - 6.4.1 Courier Service Express (CSE)
  - 6.4.2 Delovye Linii Group
  - 6.4.3 Express Tochka Ru
  - 6.4.4 Garantpost
  - 6.4.5 Major Express
  - 6.4.6 Pony Express
  - 6.4.7 Russian Post
  - 6.4.8 SberLogistics LLC
  - 6.4.9 SDEK-Global LLC
  - 6.4.10 Ural-Press (Boxberry)
  - 6.4.11 Yandex

## 7 KEY STRATEGIC QUESTIONS FOR CEP CEOS

## 8 APPENDIX

- 8.1 Global Overview
  - 8.1.1 Overview
  - 8.1.2 Porter's Five Forces Framework
  - 8.1.3 Global Value Chain Analysis
  - 8.1.4 Market Dynamics (DROs)
  - 8.1.5 Technological Advancements
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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