Russia Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 150 pages | Mordor Intelligence

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Report description:

Russia Freight And Logistics Market Analysis

The Russia freight and logistics market was valued at USD 72.96 billion in 2025 and estimated to grow from USD 74.87 billion in 2026 to reach USD 85.17 billion by 2031, at a CAGR of 2.61% during the forecast period (2026-2031). This steady trajectory mirrors the sector's recalibration toward Asia-Pacific trade corridors, the Northern Sea Route, and the INSTC. Sanctions-prompted fleet localization, rapid e-commerce penetration, and warehouse automation initiatives underpin demand resilience, while rail bottlenecks to Far East ports, elevated Bank of Russia interest rates, and driver shortages restrain near-term capacity addition. Competitive intensity rises around Moscow, St. Petersburg, and Far East gateways where infrastructure modernization is most pronounced. Technology adoption-spanning digital freight platforms, GosLog procurement, and robotics-differentiates providers that can navigate compliance complexities and deliver end-to-end visibility. Despite macro headwinds, the Russia freight and logistics market continues to leverage commodity exports, defense procurement, and consumer-driven parcel volumes to sustain incremental growth.

Russia Freight And Logistics Market Trends and Insights

E-Commerce Boom and Last-Mile Expansion

Russia's e-commerce turnover hit RUB 11.2 trillion (USD 125 billion) in 2024-scaling 39% year on year and reshaping parcel density, cut-off times, and micro-fulfillment strategies. CDEK grew to 4,754 pickup points and logged RUB 70 billion (USD 785 million) net profit, proving that diversified pickup, PUDO, and locker formats lower failed-delivery costs and compress lead times. The surge forces traditional freight forwarders to bundle last-mile services or cede share to vertically integrated marketplaces. Temperature-controlled urban warehouses rise in tandem with online grocery adoption, especially in Moscow and St. Petersburg, where parcel volumes exceed proportional population share. As same-day expectations normalize, route-optimization algorithms and crowd-sourced couriers become central to cost containment.

Pivot-to-Asia Trade Corridors (INSTC, Eastern Polygon)

Russian Railways allocated RUB 3.7 trillion (USD 41.5 billion) through 2030 to lift Eastern Polygon capacity toward 210 million tons, while INSTC volumes via Caspian ports grow as exporters bypass EU checkpoints. FESCO's EUR 40 million (USD 44 million) Zabaikalsk terminal upgrade with Xi'an partners aligns private capital to state corridor policy. Gauge-change nodes at Zabaikalsk and Dostyk remain chokepoints, yet double-tracking and electrification projects on the Trans-Siberian reduce dwell times. The pivot cuts door-to-door lead times to India by 10-12 days and opens new break-bulk, agro, and machinery flows through Astrakhan and Makhachkala. However, shippers must still manage insurance premiums, customs harmonization, and rolling-stock certification across multi-country legs.

Rail Capacity Bottlenecks to Far East Ports

Container tonnage on the Russian Railways network dipped 1.7% in the first five months of 2025, underscoring chronic line saturation despite multi-year upgrades. Eastern Polygon electrification and double-tracking projects disrupt traffic during construction, causing a 7-day average dwell at key marshaling yards. Vladivostok and Vostochny ports handle seasonal spikes in coal and fertilizer exports that clash with container vessel windows, forcing carriers to divert to Busan or Dalian at added transshipment cost. Synchronizing port hinterland rail slots with vessel ETAs remains critical to unlock corridor potential.

Other drivers and restraints analyzed in the detailed report include:

Warehouse Automation and Robotics AdoptionYear-Round Northern Sea Route TargetsHigh Central Bank Rates Inflating Lease/Credit Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Manufacturing retained a 31.10% share of the Russia freight and logistics market in 2025, driven by defense, machinery, and import-substitution programs demanding robust inbound component flows. Wholesale and Retail Trade, however, posts a 2.9% CAGR (2026-2031), mirroring consumers' pivot to omnichannel commerce and frequent SKU rotations.

Defense output growth elevates oversized and hazardous-materials movements that command premium rates. Retailers pursue regional fulfillment models, spawning demand for micro-fulfillment hubs near Kazan and Yekaterinburg. Agricultural processors expand cold-chain capacity for export-oriented protein lines, while construction materials ride domestic infrastructure spending. Providers able to flex between pallet-based and parcel-level services capture wallet share across industries.

Freight Transport accounted for 73.55% of the Russia freight and logistics market size in 2025 as bulk commodity exports, defense shipments, and intercity replenishment anchored demand. CEP, though smaller, is pacing at 3.09% CAGR (2026-2031) thanks to online retail and B2B express spare-parts flows. Businesses integrate API-driven booking across segments, bundling truckload, warehousing, and parcel services to smooth seasonality.

Investment shifts toward vehicle telematics, cross-dock automation, and unified control towers. CEP operators embed AI-assisted route planning, squeezing delivery windows to sub-24 hours in top metros. Freight Transport players confront higher tolls and emissions norms, incentivizing Euro-6 substitution and LNG tractor pilots. Sector convergence widens M&A appetite as incumbents hunt for e-commerce logistics capabilities.

The Russia Freight and Logistics Market Report is Segmented by End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others) and by Logistics Function (Courier, Express, and Parcel (CEP), Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

A2 Cargo Business Lines CDEK Delko Transport Company Delo Group DPD Group Eurosib FESCO Transportation Group Freight One (PGK) Globaltrans Investment PLC ID Logistics Vostok PEC R-Line Ruscon (Delo) RZD Logistics Sovtransavto Group STS Logistics TransContainer Volga Shipping Volga-Dnepr Group

Additional Benefits:

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

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