

Russian collection services market: features and development prospects under economic crisis



Phone: +44 20 8123 2220
Fax: +44 207 900 3970
office@marketpublishers.com
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Main research objectives are:

1. Analysis and estimation of scale and influence depth of crisis processes, appeared in Russia, to collection market.
2. Revealing tendencies on the Russian collection market under effect of external and internal environments, and further development scenarios analysis.

Information sources:

1. Statistical data and forecasting information of the RF Ministry of Economic Development and Trade, Ministry of Finance, and Federal State Statistic Service.
2. Companies press releases, branch and expert estimations of mass-media.
3. Own informational resource and extensive enterprises database of Information Agency «CredInform North-West ».

General conclusions:

Nowdays it is observed the companies quantity growth of collection market in result of increase in percent of not returned debts; propensity of banks to transfer credits debts to specialized agencies; and new markets appearance as well (housing and communal services, cellular communication, growing credit trade whereas sooner or later participants become potential clients of collectors.

However the Russian market is not saturated by collection agencies. In particular there are not enough companies capable to offer wide range of information services, and also complex debts collecting strategy which does not consist at all that a collection agency would be an affiliated item of companies group. Where there is both real estate agency and security firm, and other kinds of business connected just indirectly with collection services.

Among other reasons that resulted to collection market growth during crisis, experts note not only sharp growth of delayed payments by citizens. As for analysts, from approximately 55 billion rubles of debts which are in work at collectors (40 billion rubles was on the beginning of year), 85% were transferred by banks. But the basic supplier of bad debts has recently been a corporate sector. And if up to day banks tried not to spoil the relation with enterprises (especially with large and average) so it seemed not to ceremonies during crisis. 3% of portfolio rating value began to cost debts with delay.

Mass borrowers solvency reduction increases collection business investments, and now it is difficult to involve extra means even by the largest participants of the market. Even quite diligent borrowers in such situation are not able to execute the obligations under credit contracts. Therefore, in spite of fact that the increase in volume of the delayed debts in 1.5-2 times is expected in 2009, to collect money begins much more difficult.

The potential of Russian collection services market is huge. Considering only the bank crediting which volume doubles annually, and also the volume of delayed debts almost proportionally grows together with it, it is possible to assert that demand for collection services is more and more claimed.

The range of collection agencies clients is not limited any banks at all: it includes companies from such various sectors of business, as for example, telecommunications, insurance, finance, trade, services, housing and communal services, so open space for activity is everywhere where there are delayed and problem debts.

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