

# Russia - Transport and Logistics: Economic recovery to drive growth (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

Russia's economy is highly dependent on oil exports, which made it vulnerable to the oil crisis in 2015, where the price of crude oil dropped sharply from a peak value of US\$115.0 per barrel in June 2014 to US\$35.0 per barrel in February 2016. The country's GDP registered a CAGR of -7.7%, from US\$2.2 trillion in 2012 to US\$1.5 trillion in 2017. However, GDP is anticipated to register a CAGR of 3.7% from US\$1.6 trillion in 2018 to US\$1.8 trillion by 2022. Economic growth is anticipated to increase due to improvements in the price of oil, macroeconomic stabilization and business and consumer confidence.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

### Key highlights

Infrastructure projects to improve road transport GVA

Total road transportation GVA in Russia registered a CAGR of -6.3% from US\$69.9bn in 2012 to US\$50.5bn in 2017. It is anticipated to post a CAGR of 4.4% from US\$54.1bn

in 2018 to US\$64.3bn in 2022. The increase can largely be attributed to investment initiatives undertaken by the government towards road infrastructure development. In 2017, Russia and China agreed to establish a US\$10bn Russia-China RMB Cooperation Fund to invest in projects related to China's Belt and Road initiative as well as the Russia-led Eurasian Economic Union initiative.

#### Increase in volume of goods drive freight traffic growth

Total inland water freight volume stood at 117.5 million tons in 2017 and is anticipated to post a CAGR of 4.2% from 118.4 million tons in 2018 to 139.6 million tons in 2022. Increasing volumes, coupled with expansion activities, are likely to drive freight traffic. Total inland water freight traffic recorded a CAGR of 1.2% from 3,739.6 billion ton km in 2012 to 3,978.1 billion ton km in 2017.

#### New railway lines to drive rail freight traffic growth

Rail freight traffic recorded a CAGR of 1.9% from 2,782.6 billion ton km in 2012 to 3,060.5 billion ton km in 2017. It is expected to post a CAGR of 1.8% from 3,119.8 billion ton km in 2018 to reach 3,355.1 billion ton km by 2022. The increase in will primarily be due to more railway infrastructure projects and greater cooperation with trade partners. Improving transport connectivity among major cities through the construction of the high-speed railway (HSR) has been a major focus area.

## SCOPE

**Risk & Reward Index:** The Risk & Reward index compares the position of Russia's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View:** Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

**Industry SWOT Analysis:** Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in Russia's transport and logistics market.

**Industry Benchmarking:** Benchmark how Russia's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet

size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Russia transport and logistics industry compared to other countries in Central and Eastern Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Russia transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Russia transport and logistics industry?

What are the Russia transport and logistics industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Russia transport and logistics industry?

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