

# Russia Courier, Express, and Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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## Abstracts

The Russia Courier, Express, and Parcel (CEP) Market size is estimated at 3.11 billion USD in 2024, and is expected to reach 3.76 billion USD by 2030, growing at a CAGR of 3.24% during the forecast period (2024-2030).

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 domestic CEP value in Russia are projected to register a CAGR of 3.24% during 2023-2029.

The growth in domestic and international parcel volumes and values in Russia was largely driven by e-commerce in 2021 due to the pandemic followed by the Russia Ukraine war disruptions. A consumer shift in preference toward online shopping was witnessed as a residual impact of these events. This increased the demand for products from various e-commerce segments which led to domestic segment's share to touch 68.08% in 2021 whereas international segment's share stood at 31.92%.

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.

## Russia Courier, Express, and Parcel (CEP) Market Trends

Russia's transportation storage dominates road transport, with over 1.1 billion metric tons 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 2022, the manufacturing sector accounted for 14.45% of the GDP. The manufacturing industry relies heavily on transportation to acquire the necessary raw materials for its production processes. The transportation and storage sector rose by 11.22% YoY in 2022 recovering from the Russian invasion of Ukraine, which inflicted damage on transport infrastructure. In 2022, the growth in road transit volumes increased by 2.5 times and the growth in popularity in the Russian regions of the express delivery format from warehouse to door will also contribute to the development of road transportation.

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 cm<sup>3</sup> in 2022. Russia's gas exports were 10% lower in 2022, at 185 billion cm<sup>3</sup>. 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 Courier, Express, and Parcel Industry Overview

The Russia Courier, Express, and Parcel (CEP) Market is fairly consolidated, with the top five companies occupying 73.64%. The major players in this market are Delovye Linii Group, Express Tochka Ru, Russian Post, SberLogistics LLC and Yandex (sorted

alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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