



**Intesco  
Research  
Group**

# MARKET OF RIVER AND SEA FREIGHT TRANSPORTATION



MOSCOW 2014

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**ABOUT INTESCO RESEARCH GROUP**



## RESEARCH METHODOLOGY

**Subject of research:**

MARKET OF SEA AND RIVER FREIGHTS TRANSPORTATIONS

**Goal of research:**

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2014-2016

**Regions of research:**

RUSSIA AND WORLD

**Main blocks of research:**

VOLUME OF THE MARKET OF SEA AND RIVER FREIGHTS TRANSPORTATIONS

TRENDS ON RUSSIAN MARKET OF SEA AND RIVER FREIGHTS TRANSPORTATIONS

FACTORS INFLUENCING THE MARKET OF SEA AND RIVER FREIGHTS TRANSPORTATIONS

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ANALYSIS OF RIVER AND SEA FREIGHTS TRANSPORTATIONS IN RUSSIA

ANALYSIS OF TRANSSHIPMENT IN RUSSIAN SEA AND RIVER PORTS

ANALYSIS OF PASSENGER TRANSPORTATIONS BY WATER TRANSPORT OF RUSSIA

ACTIVITY OF SEA PORTS OF RF

FORECAST OF THE MARKET OF SEA AND RIVER FREIGHTS TRANSPORTATIONS FOR 2014-2016

**Largest Russian enterprises with profiles:**

«SAKHMP» JSC



«DVMP» JSC

«MMP» JSC

«YYENISEYSKOE RECHNOE PAROKHODSTVO» JSC

«LORP» JSC

**Information sources used:**

Federal State Statistics Service

Ministry of economic development of RF

Ministry of Transport of RF

Federal Customs Service

Federal Tax Service

Experts' evaluation of the branch

Reports on retail sales

Materials of the main players of the branch

Data of professional associations

Printed and electronic publications of the branch

**The research contains 36 schedules, 32 diagrams and 65 tables**

## EXTRACTS FROM RESEARCH

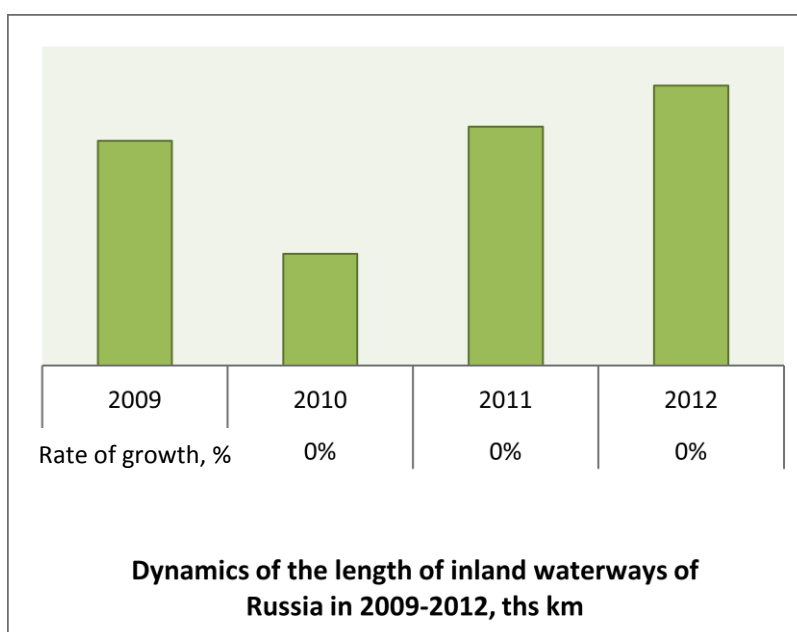
### CHAPTER 5

#### *FACTORS INFLUENCING THE MARKET OF SEA AND RIVER FREIGHTS TRANSPORTATIONS*

Further development of inland water transport should consider inland waterways conditions (IWW).

Russia has the longest IWW network in the world – their length in 2012 made 101 381 thousand km, 6,5 thousand kilometers of them are included into the Single deep-water system having throughout project depth at least 4 meters and allowing to connect all European territory of the Russian Federation into a single transport network, capable to pass all types of river crafts. The Single deep-water system allows to transport freights not only in-Russian directions, but also to deliver freights to ports of the Baltic, Barents, Caspian and Black Sea.

In 2010 secured size of navigable channel on inland waterways decreased by 0,4%. However in 2011-2012 secured size of navigable channel increased by 266 ths km to 48 388 ths km.



**CHAPTER 9****ANALYSIS OF SEA AND RIVER  
FLEET OF RUSSIA**

Total number of water transport of Russia from 2008 to 2013 reduced by 3,6 thousand units. In 2013 water transport number in total number amounted to less than 15 thousand units that was 9% less, than in the previous year. Running forward, it is necessary to specify that abbreviation of fleet is connected with age of sea and river fleet which comes closer to the critical.

In 2013 in the structure of Russian water transport by types of navigation the largest share belonged to inland water navigation. About 10% belonged to the share of sea fleet and combined navigation fleet (“river-sea”) had 4%.

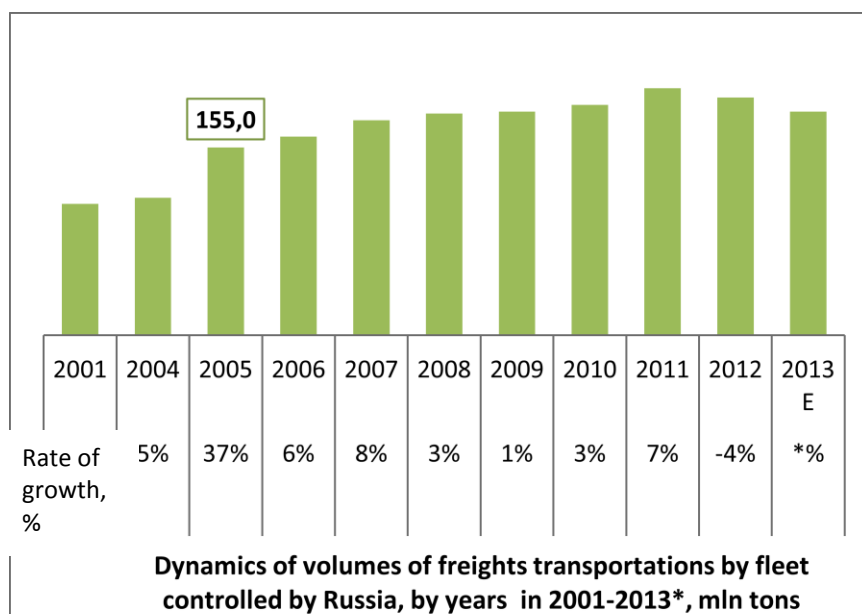
So, in the analysis of Russia water transport it is necessary to consider the fact that the most part of the fleet, controlled by Russia, was registered under the Russian flag (\*\*\*%), however under flags of other states the main part of tonnage (\*\*\*%) was registered.



## CHAPTER 11

ANALYSIS OF RIVER AND SEA  
FREIGHTS TRANSPORTATIONS  
IN RUSSIA

Volume of freights transportation by fleet controlled by Russia, up to 2011 was characterized by positive trend. Thus, during 10 years parameter of freights transportations volumes by fleet controlled by Russia, increased by 88%, or by \*\*,4 mln tons and in 2011 reached the level of 203,9 mln tons. However in 2012 4% decrease of freights



transportations volumes to \*\*,2 mln tons was marked. Such a decrease was due to change of statistics accounting methodology, as a result of which transportations by mixed navigation “river-sea” vessels since 2012 belong to inland waterways transportations.

It should be marked that the main part of freights transportations by fleet controlled by Russia, in 2012 was provided by the fleet under Russian Flag, the share of which in the structure of freights transportations by types of flags during the surveyed period increased from 69% to \*0%, or by \*1 %. At the same time the share of the fleet under Russian flag decreased by 21 %, \* % of which - in 2012.

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## **ABOUT INTESCO RESEARCH GROUP**

## ABOUT INTESCO RESEARCH GROUP

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All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

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IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**

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