



**Intesco  
Research  
Group**

# WORLD MARKET OF TRANSPORT AND LOGISTICS SERVICES. RUSSIAN MARKET OF TRANSPORT AND LOGISTICS SERVICES



MOSCOW 2012

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**ABOUT INTESCO RESEARCH GROUP**

## RESEARCH METHODOLOGY

**Subject of research:**

MARKET OF TRANSPORT AND LOGISTICS SERVICES

**Goal of research:**

EVALUATION OF THE RUSSIAN MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2012-2015

**Regions of research:**

RUSSIA AND WORLD

**Main blocks of research:**

VOLUME OF THE WORLD MARKET OF TRANSPORT AND LOGISTICS SERVICES

VOLUME OF THE RUSSIAN MARKET OF TRANSPORT AND LOGISTICS SERVICES

FREIGHT TRANSPORTATIONS VOLUME

PASSENGER TRANSPORTATIONS VOLUME

THE LARGEST COMPANIES BY MARKET SECTORS

TRENDS ON THE MARKET

STATE REGULATIONS

PROFILES OF THE LARGEST COMPANIES IN THE MARKET SEGMENTS

FORECAST OF THE MARKET DEVELOPMENT FOR 2012-2015

**The market is segmented:**

BY TYPES OF SERVICES

BY PRODUCERS

BY REGIONS OF RUSSIA

BY YEARS

**The largest companies with profiles**

«RZHD» JSC

«AK «TRANSNEFT» JSC

«PKT» JSC

«MMP» LLC  
«AEROFLOT» JSC  
«AK «TRANSAERO» JSC  
«PGK» JSC  
«UTS» JSC  
«POCHTA ROSSII» FSUE  
«ROSPECHAT» AGENCY 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  
Field expert evaluations  
Reports on retailing  
Materials of the field's main players  
Data of professional associations  
Field print and electronic publications

**The research contains 65 schedules, 28 diagrams and 76 tables.**

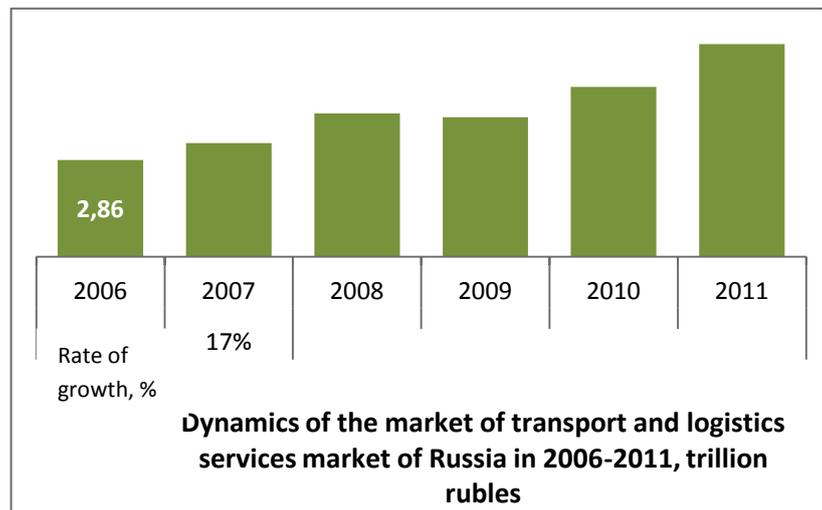
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#### *VOLUME OF THE RUSSIAN TRANSPORT AND LOGISTICS SERVICES MARKET*

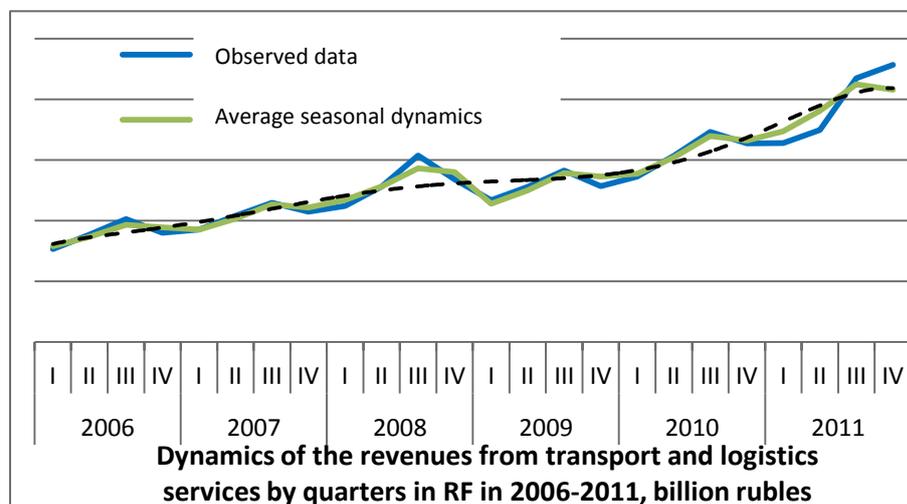
Volume of the Russian transport and logistics services market in 2006-2011 increased \*\*\* times, the average rate of growth amounted to \*\*\*% at that, besides 2009, the market volume was increasing by about \*\*\*% annually.

The decrease of 2009 was caused by the all-Russian market decline, due to the crisis of 2008. But unlike the majority of manufacturing industries the market volume remained almost the same and continued to grow in the following year at the same level that was before the crisis.



...

It should be marked that up to 2011 the seasonal dynamics was stable and did not change neither during the economic gap of 2009, nor during the summer fires of 2010. As we mentioned above, the significant deviation was marked on the schedule in 2011 only.

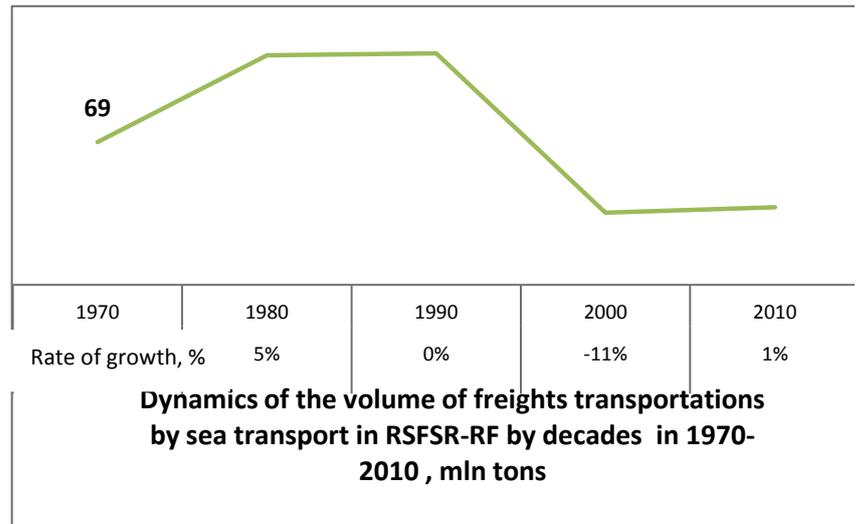


**CHAPTER 5**

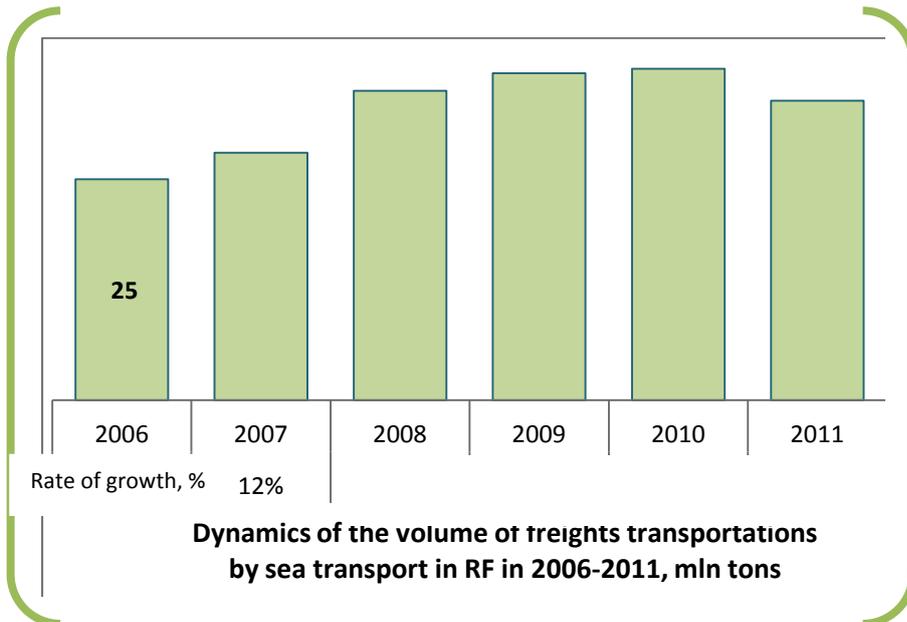
**FREIGHTS TRANSPORTATION VOLUME**

**5.4. Freight transportations volume of sea transport**

Freight transportations volume of sea transport reached its maximum in the beginning of 1980-s and up to 1990 did not change. The collapse of the USSR led to almost four times decrease – the minimum was reached in 2005-2006, then a slight increase was observed.



Freight transportations volume reached the minimum in 2006 and increased up to 2010 inclusive, having increased one and a half times – to \*\*\* mln tons. In 2011 \*\*\*, decrease of transportations was observed, caused by the decrease of international supplies due to the global decrease of the demand.



*Structure of transported goods*

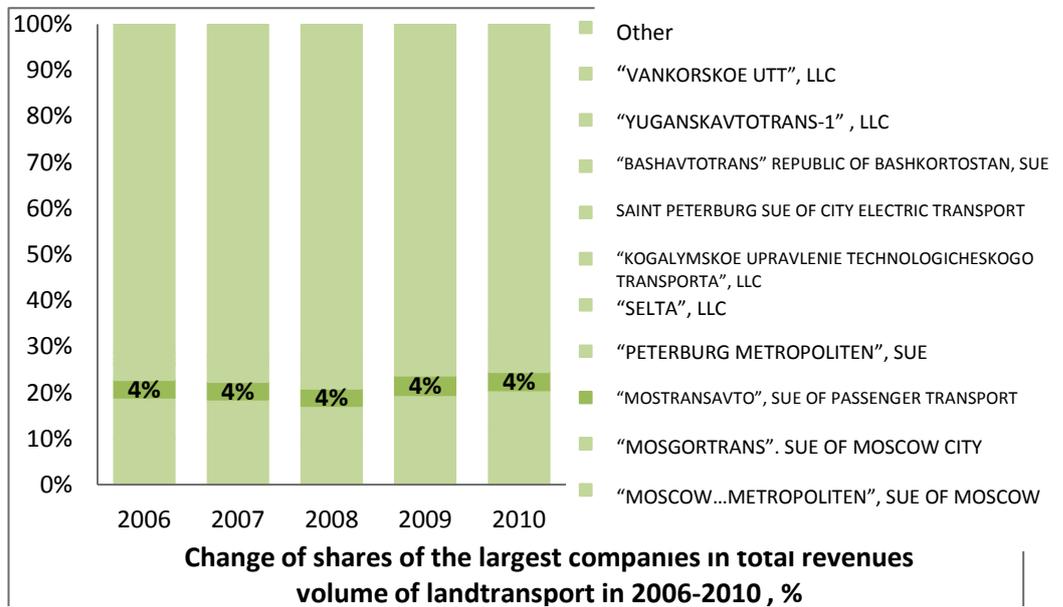
Freights transportation structure in 2009-2011 differed with stability – oil products had about \*\*\*% of all the transported goods, gas – about \*\*%, oil – remaining \*\*%. The fluctuations did not exceed \*\*%.



Dynamics of the freight transportation volume

## CHAPTER 7

## THE LARGEST COMPANIES



The market of other land (not rail transport and pipelines) transport was decentralized very much. Even the largest companies of the market - «MOSGORTRANS» and «MOSKOVSKIY METROPOLITEN ORDENA LENINA AND ORDENA KRASNOGO ZNAMENI IMENI LENINA» had only 10% on the market. «MOSTRANSAVTO» and «PETERBURGSKIY METROPOLITEN» had 3-4% of the revenues, other companies had insignificant shares.

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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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**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**