



Transport Intelligence

Market Intelligence for the Transport and Logistics Industry



Russia Transport & Logistics 2009

An analysis of the Russian Transport and Logistics industry including market sizing, forecasts, trends, trade flows and profiles of the key market players

Price: £995
Pages: 153
TIRTL0903

Understand the Russian logistics industry

Russia entered 2008 with its economy looking strong based on exports of commodities, particularly energy, which were at all time high prices. With the onset of the economic downturn the situation in 2009 has deteriorated rapidly.

In addition to macro-economic worries, the Russian business environment is one of the most challenging in the world. Inefficiency, bureaucracy and corruption are rife. Within the transport and logistics sector, lack of investment has resulted in weak infrastructure compared with international standards.

Systemic structural problems combine with the vast geography of the country; mountainous and desert regions as well as an inhospitable climate to make the challenges facing the transport industry unique.

However despite these problems, the Russian market continues to offer some of the best long term prospects in Europe for logistics and express companies.

Not only is the country a major source of oil, gas and minerals, but it has a fast growing consumer society. The wealth generated in the past few years has meant that there has been high demand for West European and global products, particularly high value and luxury.



Foreign direct investment has been poured into industries, such as the automotive, by multinationals keen to take advantage of the growth in levels of disposable income.

International logistics and express companies have followed their clients into the market, piggybacking on their expansion, and at the same time creating international and domestic networks to facilitate the flow of commerce.

What does the report contain?

Russia Transport & Logistics 2009 contains a comprehensive overview of all the key transport modes including:

- air
- sea and ports
- road
- rail
- Inland waterways

In addition the report provides:

- Key trends and developments in both the supply and demand-side
- information on the major ports and airports

- a guide to the problems of doing business in the country; the realities of importing goods and the strategies employed to overcome government bureaucracy.
- market sizes and 5 year forecasts for express and logistics sectors
- numerous company profiles of the leading international and Russian-owned companies
- Information on the main transport corridors utilised by shippers and logistics companies for bringing goods into the country
- An assessment of future prospects for the transport and logistics industry.
- Locations of the major distribution sites

International transport corridors

Which are the best routes to move goods to and from Russia? The report details the main transport corridors highlighting the major challenges which exist as well as the main infrastructure developments that will facilitate trade.

The corridors which the report profiles include overland routes from Germany; connections through Russian and Baltic Ports; the Trans-Siberian Railway as well as some of the more problematic routes such as the Arctic and Black Sea Routes.

The report also contains information on the key airports and ports, and includes information on the Russian domestic road network as well as a detailed analysis of Russian Railways.



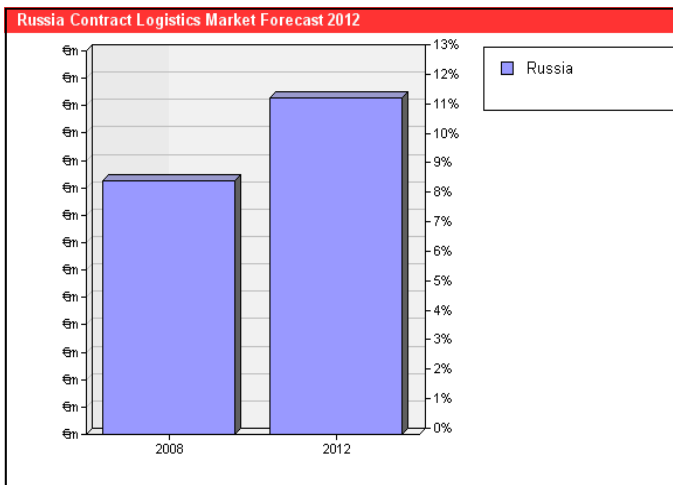
Pan-European Transport Corridors

Logistics and express analysis, company profiles and sizing

Russia Transport and Logistics 2009 contains analysis of the key market sectors including third party logistics and express. It looks in detail at the automotive logistics industry, which up until the global economic slowdown, was a key growth area.

As well as market analysis the report contains market sizing and forecasts for the Contract Logistics industry and Domestic and International Express sectors.

In addition, all the main international and domestic express and logistics players are profiled within the report providing an insight into their development and operations.



Contract Logistics market forecasts

Why should you buy Russia Transport & Logistics 2009?

Russia has been one of the fastest growing express and logistics markets over the past five years. Despite the slowdown, the market has huge potential and with its huge natural resources will play an important role in the global economy. Russia Transport & Logistics 2009 will help you to become better cognisant of:

- Russia's importance to the world's economy and global supply chain strategies
- The specific challenges of doing business in the market
- Market trends in the transport and logistics industry
- The major transport and logistics companies present in the market
- Market size and growth rates
- Potential investment opportunities
- The challenges which threaten higher rates of growth

How to buy Russia Transport & Logistics 2009

Russia Transport & Logistics 2009, price £995, can be purchased from the Transport Intelligence website: <http://www.transportintelligence.com> or by contacting Sarah Smith on +44 (0)1666 519900.

Alternatively you can email her on ssmith@transportintelligence.com

Contents Page

About Transport Intelligence.....	2
Contents Page	3
1.0 Introduction	6
1.1 Country Overview.....	6
2.0 Economic Analysis	8
2.1.1 General	8
2.1.2 Growth in Output.....	8
2.1.3 Foreign Trade.....	9
2.1.4 Economic Development	13
2.1.5 FDI	13
2.1.6 The Effect of the Current Downturn	14
2.1.7 Business Risks in Russia.....	15
2.1.8 Economic Forecast for Russia.....	15
3.0 Transport infrastructure	16
3.1 Summary.....	16
3.1.1 Rail infrastructure.....	16
3.1.2 Road Infrastructure	16
3.1.3 Air Transport	17
3.1.4 Ports.....	17
3.2 Overview	19
3.3 Transport Activity	20
3.4 Individual Transport Modes.....	21
3.4.1 Rail infrastructure.....	21
3.4.2 Road Infrastructure	25
3.4.3 Air Transport	30
3.4.4 Ports.....	36
3.4.5 Inland Waterways	43
3.4.6 Warehousing & Location of Logistics Hubs	44
3.4.7 Customs Procedures	48
4.0 International Trade Routes	50
4.1 Trade routes.....	50
4.1.1 Overland Route from Germany.....	52
4.1.2 Route through the Finnish Ports	55
4.1.3 Routes through Baltic Ports	60
4.1.4 Route through Russian Ports.....	64
4.1.5 Trans-Siberian Route.....	66
4.1.6 Arctic Sea Route	68

4.1.7	The North-South corridor of Russia	69
4.1.8	The Black Sea route	69
4.1.9	TRACECA	70
5.0	Russian 3PL Market	71
5.1	Market Characteristics	71
5.1.1	Consumer Goods	71
5.1.2	Spare Parts	72
5.2	Automotive Logistics	72
5.3	Contract Logistics Market Size	75
6.0	Main Logistics / Transport Companies	78
6.1	Agility	78
6.1.1	Operations	78
6.2	FM Logistic	83
6.2.1	Finances	83
6.2.2	Operations	83
6.3	GEFCO	85
6.3.1	Finances	85
6.3.2	Operations	85
6.3.3	Recent News	86
6.4	Kuehne +Nagel	88
6.4.1	Operations	88
6.4.2	Recent News	89
6.5	Maersk Logistics	91
6.5.1	Operations	91
6.6	DB Schenker Logistics	95
6.6.1	Operations	95
6.6.2	Recent News	97
6.7	Deutsche Post DHL	101
6.7.1	Finances	101
6.7.2	Operations	101
6.7.3	Recent News	106
6.8	Russian Logistic service (RLS) Group	108
6.8.1	Operations	108
6.8.2	Recent News	110
6.9	Gruzovozoff	111
6.9.1	Operations	111
6.10	National Logistic Company	112
6.10.1	Finances	112
6.10.2	Operations	112
6.10.3	Recent News	113
6.11	Russian Railways RZD	115
6.11.1	Finances	115

6.11.2	Operations.....	115
6.11.3	Recent News.....	120
6.12	Russian Post.....	125
6.12.1	Operations.....	125
6.12.2	Recent News.....	126
7.0	Other Logistics Providers News and Developments	127
7.1	Cat Logistics.....	127
7.2	Dachser.....	127
7.3	DSV.....	128
7.4	FIEGE Logistik.....	128
7.5	Itella Corporation.....	129
7.6	NYK Logistics.....	129
7.7	Panalpina.....	130
8.0	The Russian Express Sector	131
8.1	Introduction.....	131
8.2	Regional Specialists.....	133
8.3	Market Size.....	133
9.0	Main Integrators / Express Carriers	136
9.1	DHL Express.....	136
9.1.1	Operations.....	137
9.2	UPS.....	142
9.2.1	Operations.....	142
9.3	TNT Express.....	143
9.3.1	Operations.....	143
9.3.2	Recent News.....	144
9.4	Pony Express.....	145
9.4.1	Operations.....	145
9.4.2	Recent News.....	146
9.5	CPCR / SPSR.....	146
9.5.1	Operations.....	146
9.6	EMS Garantpost.....	147
9.6.1	Operations.....	147
9.7	DPD (Formerly Armadillo).....	148
9.7.2	Operations.....	149
9.8	Consulate cargo.....	150
9.8.1	Operations.....	150
9.9	City Express.....	152
	Contact Transport Intelligence	153