



**Intesco
Research
Group**

MARKET OF RIVER AND SEA PASSENGER TRANSPORTATION



MOSCOW 2014

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

MARKET OF RIVER AND SEA PASSENGER TRANSPORTATIONS

Goal of research:

MARKET CONDITIONS EVALUATION

Regions of research:

RUSSIA

REGIONS OF RF

Main blocks of research:

PARAMETERS OF RIVER AND SEA PASSENGER TRANSPORT ACTIVITY

CONDITIONS OF SEA AND RIVER TRANSPORT FLEET

PASSENGER TRANSPORTATIONS ON SEA TRANSPORT

PASSENGER TRANSPORTATIONS ON RIVER TRANSPORT

LARGEST COMPANIES BY PASSENGER TRANSPORTATION ON WATER
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TRENDS OF PASSENGER TRANSPORTATIONS DEVELOPMENT

STATE REGULATIONS OF PASSENGER TRANSPORTATIONS

FACTORS INFLUENCING DEVELOPMENT OF PASSENGER TRANSPORTATIONS

FORECAST OF PASSENGER TRANSPORTATIONS DEVELOPMENT

Largest Russian enterprises with profiles:

«KANAL IMENI MOSKVY» FSUE

«PASSAZHIRSKIY FLOT» LLC

«MORTRANS» LLC

«TANIRA» LLC

«CHERNOMORSKIE SKOROSTNYE LINII» LLC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

USSIWO (Single national system concerning situation in the world ocean)

Federal Marine and River Transport Agency

Ministry of Transport of RF

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Tax Service

Experts' evaluation of the branch

Federal target programs and sub-programs

Printed and electronic publications of the branch

Data of state ministries (ministries and authorities), industry unions, specified in construction development and construction industry

Identification code used in research:

E – evaluation

P – forecast

* - forecast or evaluation

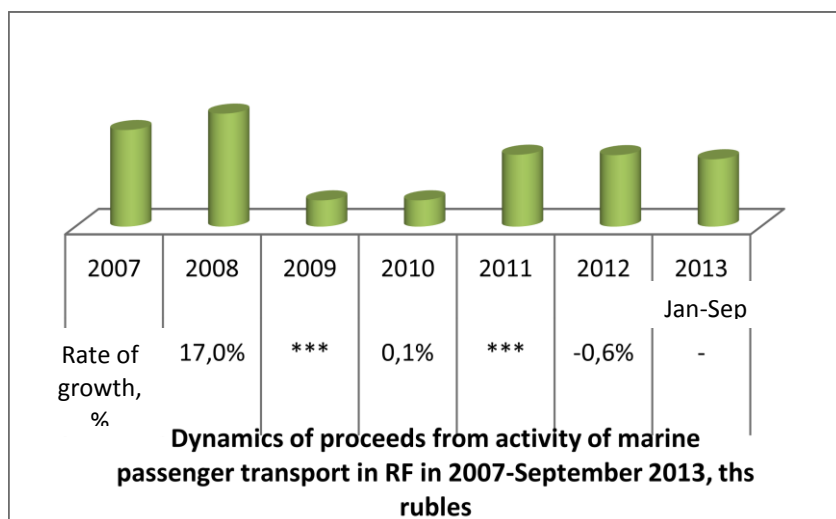
Research contains 28 schedules, 10 diagrams, 49 tables.

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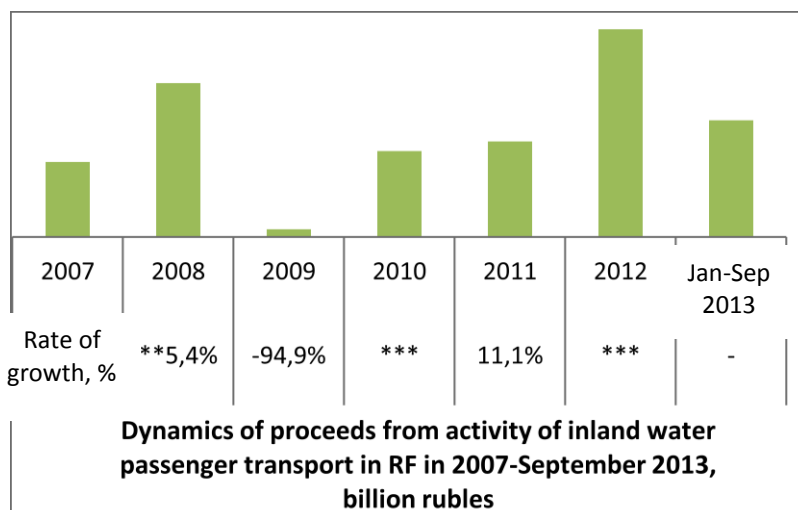
PARAMETERS OF RIVER AND SEA
PASSENGER TRANSPORT ACTIVITY

Proceeds from activity of inland water passenger transport during 9 months of 2013 amounted to *,94 billion dollars. Annual parameter of 2012 was equal to *,19 billion dollars. It was 0,6% less, than in 2011. The most unprofitable years for passenger river transport were 2009-2010, when proceeds of the branch did not exceed *,5 billion dollars.



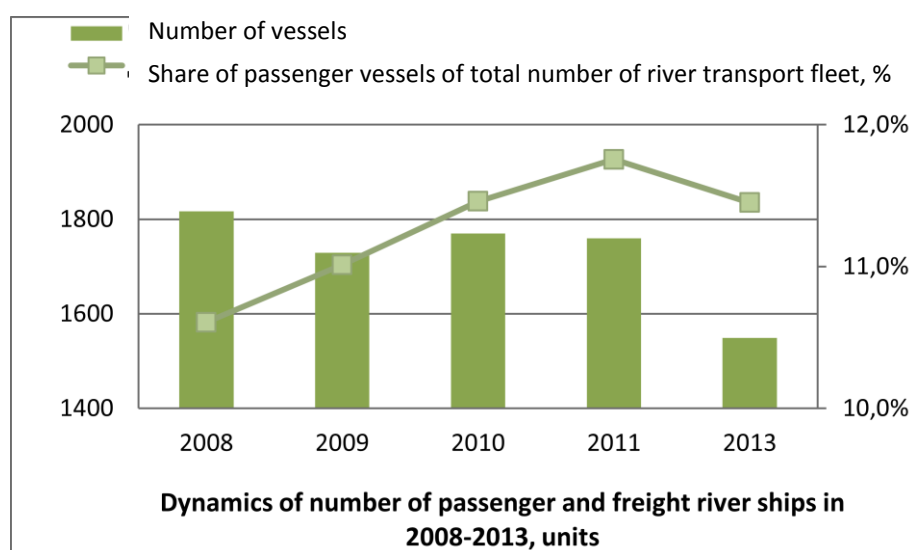
In 2012 the largest volume of investments into activity of inland water passenger transport was marked – 554,2 mln rubles. It was 2,2 times more than in 2011.

Investments into activity of river passenger transport of Leningrad Region in January-September 2013 amounted to **3,5 mln rubles. The share of regions in all-Russian volumes of financial investments into the fixed capital made 88%. About 6,8% belonged to Republic of Tatarstan.



CHAPTER 4**CONDITIONS OF SEA AND RIVER
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The share of passenger and passenger-and-freight vessels in the structure of river transport fleet in 2013 amounted to 11,5%. It was 0,3 less than in the previous year. Number of vessels during the same period decreased by 12%: from 1760 to 1549.



One of the problems of domestic river fleet is high degree of vessels wear. Almost a half of river fleet vessels is aged 31-50 years – 46%. Other relatively great segments of vessels as for beginning of 2013 were vessels aged 21-25 and 26-30 years – 15% and 19% respectively. Besides, Russian river fleet is represented by vessels aged from 51– 1845 vessels or 10% of the fleet. Relatively new vessels (up to 10 year) had 5% of the Russian river fleet.

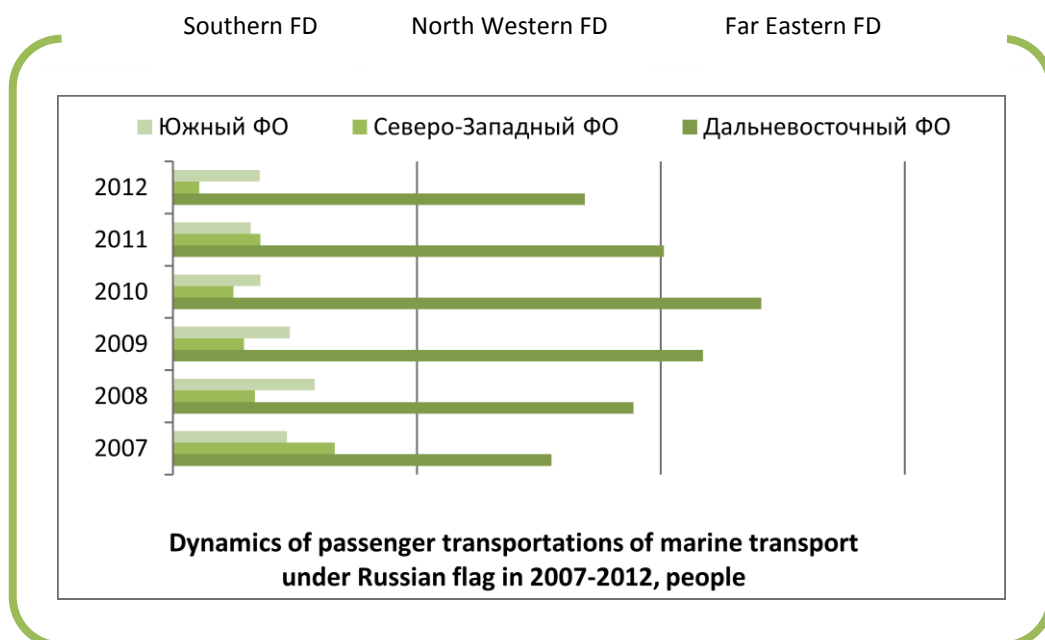
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The largest number of passengers was transported by sea transport under the Russian flag by Far Eastern FD. According to data for 2010 enterprises of sea transport transported **9,7 ths people that was *5% more than in 2007. After 2010 volume of passengers turnover of this district decreased gradually compared to the previous year: in 2011 – by *7%, and in 2012 – by 16%.

Compared to 2007 parameter of passenger transportations volume in Far Eastern FD in 2012 was 9% more.

North Western FD ranked second by number of transported passengers. In 2008 volume of transportations increased by 49%. Up to 2010 inclusive dynamics was negative and in 2011 45% growth was marked. In 2012 volume of transportations of enterprises of North Western FD decreased by *0% compared to the previous year.

Volume of passenger transportations of Southern FD in 2012 amounted to ***,5 ths people that was *4% less than in the beginning of the surveyed period.



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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP

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