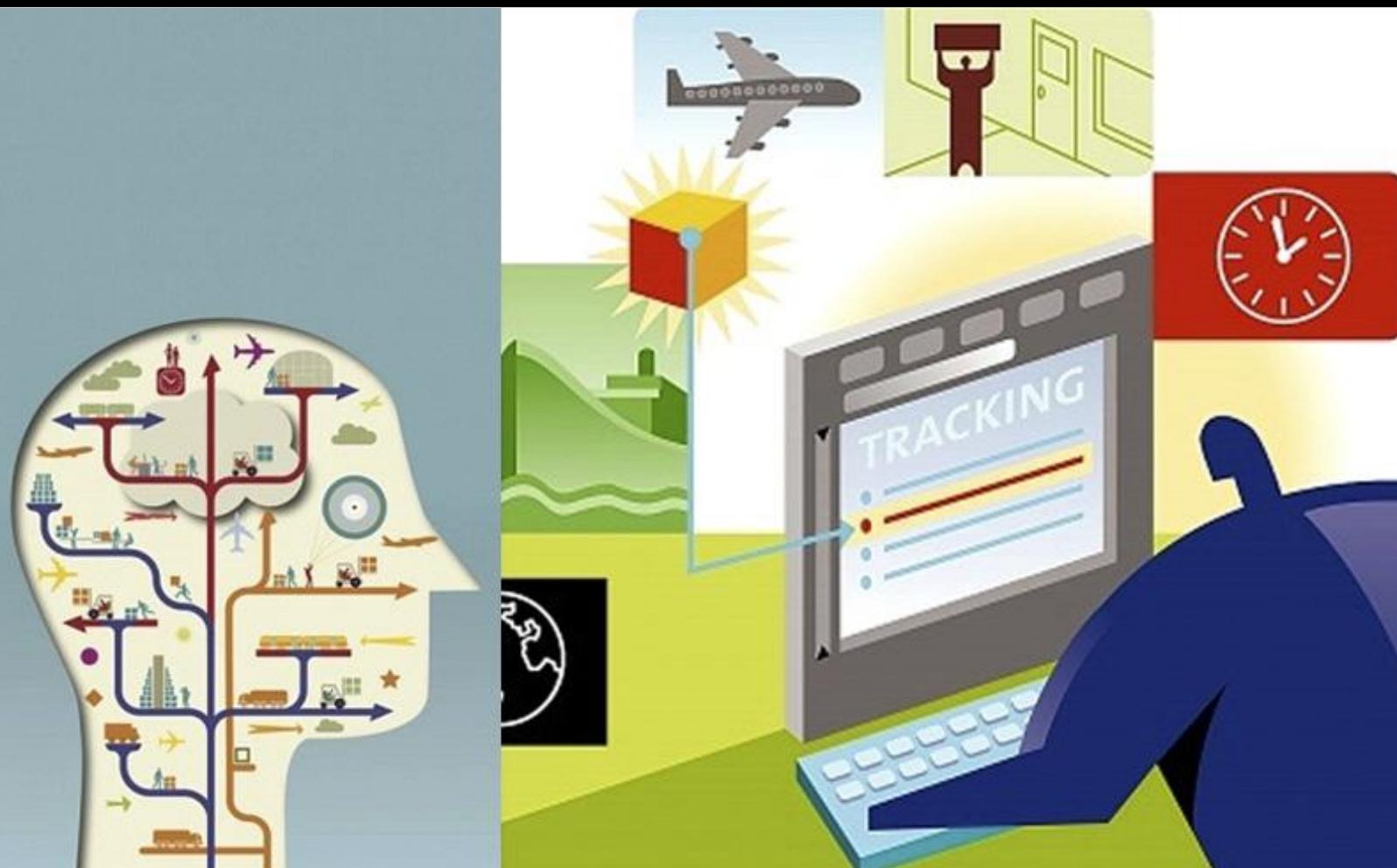




**Intesco
Research
Group**

TRANSPORT AND LOGISTICS SERVICES



MOSCOW 2014

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RESEARCH METHODOLOGY

Subject of research:

RUSSIAN MARKET OF TRANSPORT AND LOGISTICS SERVICES

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT UNTIL 2016

Regions of research:

WORLD, RUSSIA, REGIONS OF RF

Main blocks of research:

WORLD MARKET OF TRANSPORT AND LOGISTIC SERVICES
VOLUME OF THE RUSSIAN TRANSPORT AND LOGISTICS SERVICE MARKET
MAJOR SEGMENTS OF THE RUSSIAN TRANSPORT AND LOGISTICS SERVICE MARKET
TRENDS IN THE RUSSIAN TRANSPORT AND LOGISTICS SERVICE MARKET
STATE REGULATION OF THE RUSSIAN TRANSPORT AND LOGISTICS SERVICE MARKET
FACTORS AFFECTING THE RUSSIAN MARKET OF TRANSPORT AND LOGISTICS SERVICES
CONSUMERS OF TRANSPORT AND LOGISTICS SERVICES
THE LARGEST COMPANIES IN THE MARKET
FREIGHT TARIFFS
FORECAST OF THE RUSSIAN TRANSPORT AND LOGISTICS SERVICE MARKET UNTIL 2016

Profiles are made for the following largest Russian enterprises:

«FIRST FREIGHT COMPANY» OJSC
«GAZPROM UGS» LLC
«LUKOIL-TRANS» LLC
«NPK» OJSC
«PN-Trans» CJSC

Information about the main enterprises' production volume, financials of activity, balance sheet, profit and loss statements, cash flow statements, subsidiaries and some other information is also presented.

The sources of information, which are used in the research:

Federal State Statistics Service

RF Federal Customs Service

Industry experts' estimates

Materials of branch establishments

Printed and electronic publications of the branch

Materials of manufacturing companies and market participants

The research contains 67 schedules, 37 diagrams, 99 tables and 6 schemes

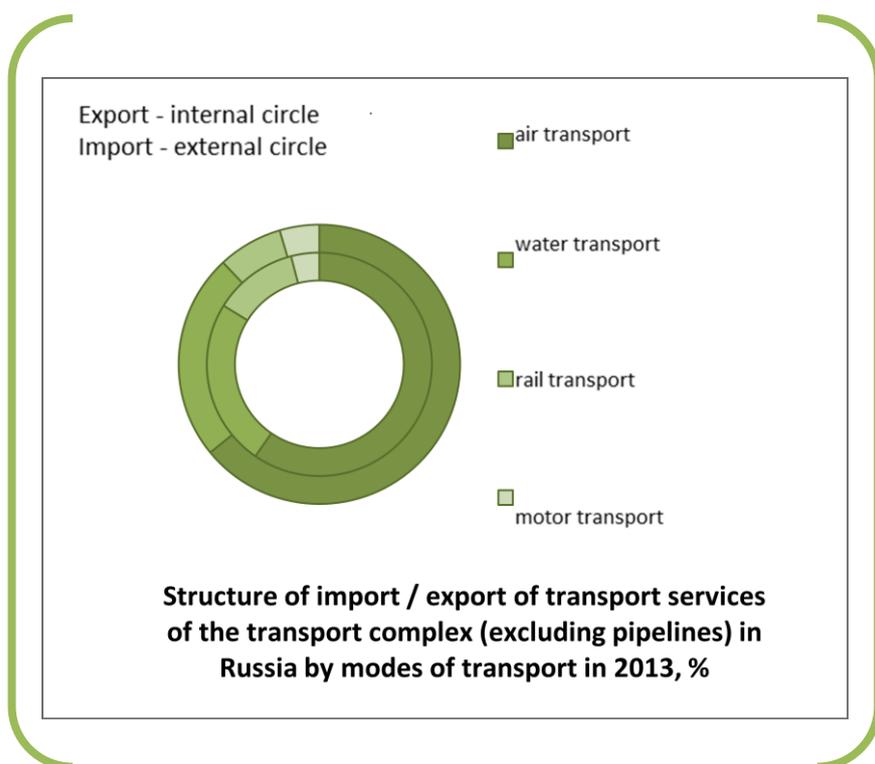
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MAJOR SEGMENTS OF THE RUSSIAN TRANSPORT AND LOGISTICS SERVICE MARKET

Structure of exports and imports of transport services by modes of transport in 2013 was about the same. Thus, the largest part of the import and export of transport services was implemented by air. The share of air and road transport in exports was less than imports by 4 percentage points and 1 percentage point respectively. The presence of water transport was the same in both directions. Only the share of rail transport in exports was higher than in the import - by 5 percentage points.

The factor hindering the development of Russian exports of transport services is the limited capacity of railway lines in Siberia and the Far East. The capacity of the Baikal-Amur Mainline is 12,5 mln. tons annually and it has no reserves of capacity expansion over 280 km, which reduces the possibility of transit traffic from the Far East to Europe.

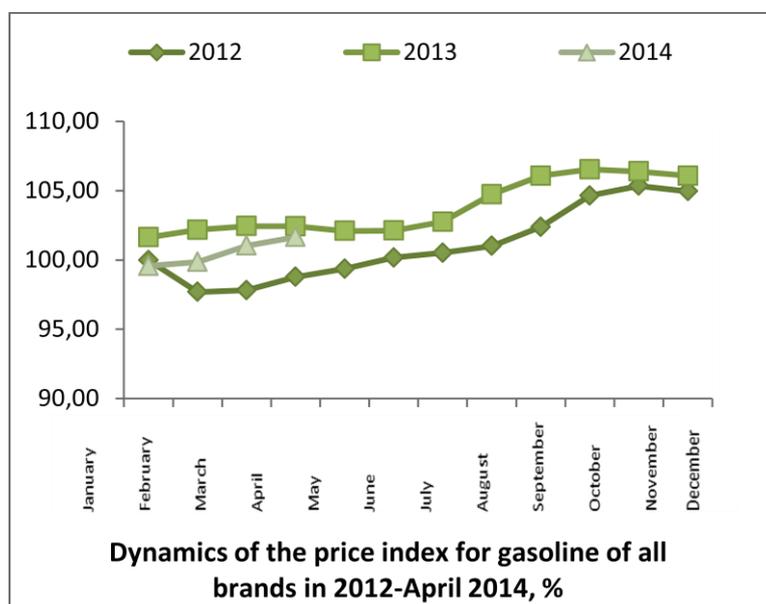


CHAPTER 8***FACTORS AFFECTING THE RUSSIAN MARKET OF TRANSPORT AND LOGISTICS SERVICES***

Transport and logistics services are influenced by many factors. One of the most significant factors was the downturn in the construction industry last year.

Another significant factor in the Russian market of transport and logistics services is the dynamics of fuel prices. Starting from February 2012 the price indices for gasoline of all brands was increasing steadily except for December, when for two consecutive years in December this figure declined. It should be noted that the slowdown occurred in the summer. An active growth occurs in July-October.

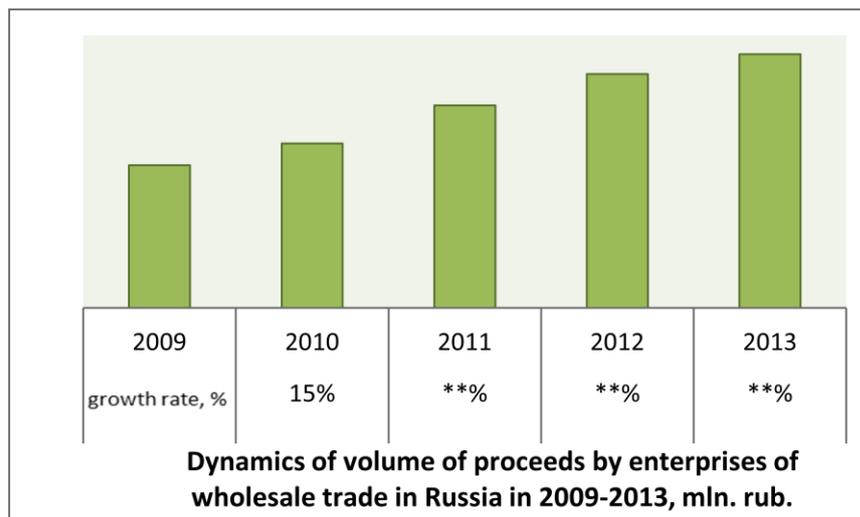
In 2013 dynamics of the price index for diesel fuel was markedly different from the curve of the previous year. So, in February there was a decrease of indices up until July 2013. However, in August the character development of the dynamics of price indices for diesel fuel in 2013 coincided with the dynamics of 2012 - a sharp increase.



CHAPTER 9

CONSUMERS OF TRANSPORT
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Dynamics of volume of proceeds by enterprises of wholesale trade in Russia for 2009-2013 was positive. The highest growth rate, according to Rosstat, occurred in 2011* and amounted to **%. By 2013 there was *** of growth rate: in 2012 by *%, in 2013 by *%. Thus, in 2013 revenues from sales by enterprises of wholesale trade in Russia amounted to ** trln. rub.



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