

MONITORING OF RUSSIA'S ECONOMIC OUTLOOK

trends and challenges
of socio-economic development



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THE CURRENT SITUATION AND SOME KEY TRENDS AND CHALLENGES IN RUSSIA'S TRANSPORTATION SECTOR IN 2025

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By the end of 2025, the Russian transportation system will see a slight decline in transportation volumes. Freight turnover for all modes of transport in January-September 2025 decreased by approximately 1-2% with a slight reduction in freight volumes, reflecting a contraction in demand for logistics against the backdrop of high rates and a slowdown in economic growth. In the meantime, there's been a shift in traffic to the eastern and southern corridors, with seaports in the Far East basin playing a bigger role. The passenger segment is showing mixed dynamics: total passenger traffic for the first nine months of 2025 reached approximately 7.6 billion people, with growth in certain segments, but air traffic is showing a slight decline (2-4%). There is a growing trend towards digitalization (TMS, platforms, AI routing), market consolidation around major players, and the development of regional transport connectivity through large-scale government investment in the transportation industry (approximately Rb1.5 trillion in 2025 and another Rb6 trillion by 2028).

The transportation sector plays a crucial role in Russia's socio-economic development, both in terms of trade and freight transportation, and in terms of ensuring labor mobility, tourism, and agglomeration effects. In his speech at the Transport of Russia forum, Prime Minister Mikhail Mishustin noted that transportation's contribution to Russia's GDP could reach around 6% (more than Rb13 trillion) by 2025.¹ Large-scale investments in transportation development will continue, with a total volume of almost Rb6 trillion over the next three years.

Dynamics of some indicators in the transportation sector

Let us consider the current dynamics of key indicators in the transportation sector that characterize freight and passenger transportation.

¹ Mishustin on the development of transport, driverless taxis, and the queue at Verkhniy Lars // Kommersant. URL: <https://www.kommersant.ru/doc/8213597>

Monitoring of Russia's economic outlook

Freight transportation

By the end of 2025, the Russian transportation system will see a slight decline in transportation volumes.

1. Freight turnover for January-September decreased slightly and amounted to 4,103 billion tons-km, compared to 4,137 for the same period last year, i.e., a decrease of 0.83%.

2. Meanwhile, freight turnover trends vary by mode of transport. Rail and pipeline transport continue to dominate, with each mode accounting for over 45% of the total. A comparison of data for individual modes of transport for January-September 2025 and 2024 shows the following trends:

- Sea transport saw the sharpest decline, falling by 21.4% from 57.86 to 45.5 billion tons-km, which may be due to a combination of factors, including rising costs and sanctions restrictions on maritime shipments.
- There was also a decrease in air transport by approximately 6.5%, from 1.34 billion to 1.25 billion.
- Rail transport decreased by approximately 1.7% from 1,884 billion tons-km to 1,851 billion.
- Pipeline transport showed the greatest stability, with 1,859 billion tons transported, the same as in the same period of the previous year.
- Growth was noted in other modes of transport: inland water transport grew by about 1.4% to 46.8 billion tons-km, and road transport grew by 3.5% to 298 billion tons-km.

3. As for the trend of increasing freight rates, according to official data, in September 2025, prices rose by an average of 7.24%¹ compared to the beginning of the year, but at the same time, the dynamics are uneven depending on the type of transport.

Pipeline transport tariffs rose by more than 8%, road transport by more than 7%, 5.5% for air transport, 2.2% for inland water transport, less than 0.5% for rail transport, which is key in terms of transport volume, and sea transport prices fell by almost 1%. Overall, the trend of slowing price growth continues, with average annual price growth exceeding 22% in 2022, reaching about 16.5% in 2023, and reaching about 13.7% in 2024.

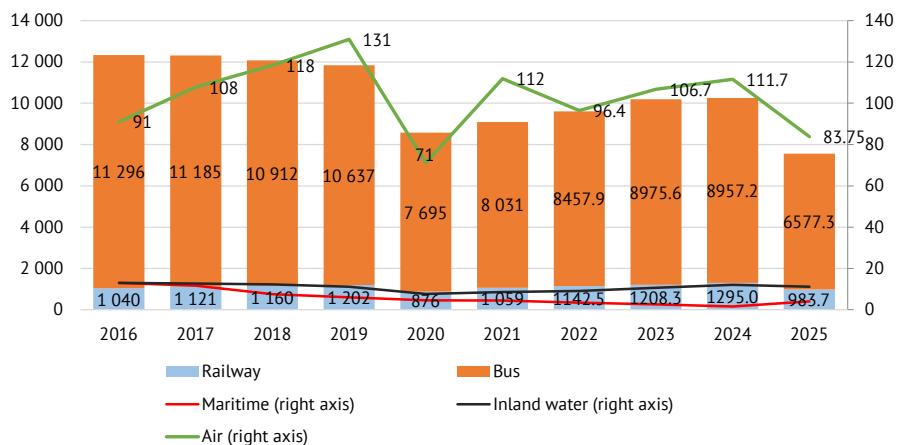
Passenger transportation

In January-September, passenger turnover decreased by approximately 1% compared to the same period in 2024, to 401.7 billion passenger-kilometers. At the same time, the dynamics of passenger turnover for different modes of transport varied:

- Air travel dropped by about 1.55% to 216.8 billion passenger-kilometers.
- Rail travel decreased by about 0.8% from 113.86 billion to less than 113 billion passenger-kilometers.
- Bus transportation remained at the 2024 level, with 71.2 billion passenger kilometers transported.
- Inland water transportation increased significantly, although it accounts for a small share of the total volume of transportation. Thus, inland water transportation carried more than 6% more passengers (0.72 billion passenger-kilometers), while maritime transportation (as of September this year) carried 70% more passengers, with the figure rising from 17.8 to 30.4 million passenger-kilometers.

¹ Freight transportation tariff indices. URL: <https://fedstat.ru/indicator/31076>

The current situation in Russia's transportation sector in 2025



Note. Data for 2025 are given for the period January-September.

Fig. 1. Passenger traffic by mode of transport, million people

Source: calculated on the Rosstat data.

Comparing statistics for January-September 2025 and January-September last year, there has been no significant change overall (approximately 7.66 billion people compared to 7.67 billion last year), and the situation is also stable for many modes of transport. At the same time, growth in inland water transportation exceeded 20%, and maritime transportation increased threefold, from 1.266 million people to 4.032 million.

Some trends and challenges in the development of the transportation industry

The described dynamics of transportation performance indicators are accompanied by certain challenges and risks:

1. An important trend in 2025 was a noticeable increase in wages in the transportation sector, including for drivers, due to the growing demand for personnel. Thus, in the first nine months of 2025, their wages grew by 12% to almost 140,000 rubles, and in just two years, wage growth reached almost 70%¹ making it comparable to wages in other relatively prestigious types of work. At the same time, wage growth is also taking into account the need for higher qualifications (knowledge of digital systems, including navigation, accounting programs, 1C). However, the gradual development of unmanned vehicles is also possible, as Yandex plans to launch the first unmanned taxis in 2026.

2. There's still a lot of debate about taxi regulations. A federal law was passed that's supposed to kick in on March 1, 2026. The law says taxis have to use cars that meet localization requirements. At first, the regulatory changes got experts and the industry worried: According to estimates by the Analytical Center under the Government of the Russian Federation, the taxi industry could lose more than 500,000 drivers, or about 51% of their number, partly because new cars that meet the requirements cost more than twice as much as those purchased earlier, and the price increase could negatively affect the affordability of taxis for the population.² Amendments to ease regulations are

1 Drivers' salaries in Russia have increased by 68% in two years // Kommersant. URL: <https://www.kommersant.ru/doc/8142446>

2 The State Duma has passed a law on the localization of taxis. How it will work. New requirements could deprive the industry of half of its drivers // RBC. URL: <https://www.rbc.ru/life/news/6824878f9a794719d7c65485>

Monitoring of Russia's economic outlook

currently being actively discussed. In particular, a mechanism is being proposed whereby, until January 1, 2033, a quota of at least 25% of the number of entries in the regional taxi register will be established, within which drivers will be able to use their cars that do not meet the localization requirements.¹

3. Industry experts and company representatives note the risks of deterioration in the financial condition of freight carriers,² mainly medium and large firms. There are problems with high credit burdens: while a few years ago the rate for leasing a truck could be around 15%, recently it has reached 30%, which hinders the renewal of the vehicle fleet, where the average age of vehicles owned by carriers is 23 years.

Nevertheless, at the end of 2025, the Russian transportation industry, operating under geopolitical pressure, capacity shortages in certain areas, high demand volatility, and accelerated digitalization of logistics, is showing stable results.▲

1 Authorities support quotas for private non-localized taxi drivers // RBC. URL: <https://www.rbc.ru/politics/24/11/2025/6923483d9a79470026285e8c>

2 Logistics increases costs // Kommersant. URL: <https://www.kommersant.ru/doc/7364615>
Crisis in Russian transport logistics: overview of the situation and regional characteristics in 2025 // URL: <https://логисты-юга.рф/news/tpost/dxflx23221-krizis-v-transportnoi-logistike-rossii-o>