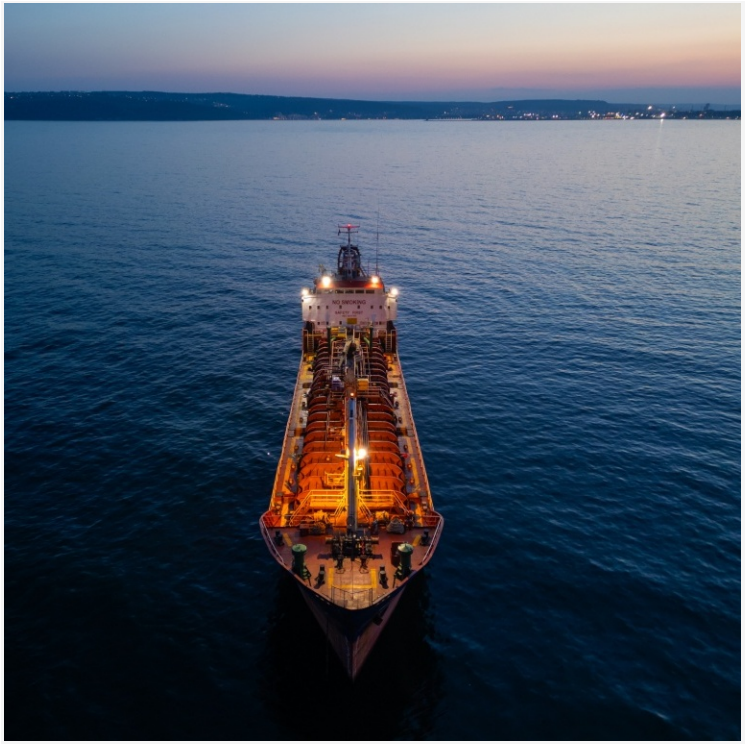


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Russian Export Logistics in the Summer of 2026

It appears that Russian foreign trade logistics in the summer of 2026 entered a mode of constant reconfiguration. For the exporter, the usual operational coordinates have changed: the significance of a specific port, rail leg, or maritime service is now determined by several factors at once — infrastructure availability, route safety, tonnage availability, and the final cost of delivery.

Statistics clearly show that by mid-summer, export shipments of fertilizers, iron ore, coal, chemical cargoes, and grain increased, while the Russian Far East continues to take on an ever-growing share of foreign trade traffic.

In the coal industry, this trend is particularly pronounced. In July, export coal loading on the Russian Railways (RZD) network grew by 13.3% to 16.6 million tons. A total of 9.8 million tons was routed through Far Eastern ports, nearly 4 million through northwestern ports, and 1.6 million tons through southern ports. Exports in the eastern direction totaled 11 million tons. Over the seven-month period, more than 110 million tons of coal were shipped for export—7.2% more than the previous year. Behind these figures lies a major restructuring of the coal business. Large producers, including companies operating at the Elga deposit, are becoming increasingly dependent on the throughput capacity of the Baikal-Amur Mainline (BAM) and the Trans-Siberian Railway, as well as the capabilities of Far Eastern terminals. Under these conditions, the transport component becomes an integral part of the export project's economics: a change in the shipping distance or delivery times can

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significantly alter the final margin.

The container segment is also showing growth, although it is developing under a different model. A significant contribution comes from the redistribution of foreign trade in favor of Far Eastern ports. For Russian exporters, this means expanding opportunities in the Asian direction, primarily the Chinese market. Vladivostok and other Far Eastern hubs are gradually transforming from just one of the delivery options into a crucial pillar of the foreign trade system. Concurrently, requirements for the rail component of the supply chain are increasing: container trains must fit into the dense schedule of the Eastern Range, while ports must ensure the synchronized handling of vessels and land transport.

The situation in the south this summer evolved in a much more complex manner. Black Sea infrastructure faced a series of disruptions that affected grain and oil export flows. Geopolitically driven disruptions in the operations of Russian ports on the Black Sea and the Sea of Azov have led to increased risks for shipowners in the region, while simultaneously raising the cost and complexity of arranging transportation.

For oil exports, the consequences turned out to be quite measurable. In the first half of August, oil shipments from western Russian ports were approximately 15% below the planned level (with the bulk of the decline occurring in Novorossiysk). For major oil companies such as Rosneft, Gazprom Neft, and Surgutneftegas, the problem has several dimensions. Restrictions at a single hub force them to restructure their port programs, search for tonnage, change cargo accumulation schedules, and factor in additional insurance costs.

The summer events manifested most dramatically in grain exports. Russian suppliers had grown accustomed to a high concentration along the southern route: in the export season from July 2025 to June 2026, about 90% of maritime grain exports passed through the Azov-Black Sea basin. When the Black Sea infrastructure faced restrictions, the market almost immediately began searching for alternatives. By mid-August, requests for rail transportation of grain to Baltic ports had reached 5 million tons. Russian exporters began to look more actively at the Baltic, Caspian, and overland routes. However, their combined capacity is still significantly lower than the volume that has traditionally passed through the southern ports.

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In this regard, the ports of Astrakhan and Olya are illustrative. In the first seven months of 2026, their exports grew by 54%. Overall, the trans-Caspian route saw an increase of 29.2%. The figures for Astrakhan are particularly interesting from a long-term logistical strategy perspective. Just a few years ago, the Caspian was perceived primarily as a niche route with a limited range of goods and relatively small volumes. Now, significantly more cargo passes through it, and this growth is driven by

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exports as well.

The logic of diversification also extends to the North. The Northern Sea Route (NSR) is gradually transitioning from an infrastructure project into a functional element of the transport system. Container operators are already testing regular services connecting Russian and Asian ports. For instance, on August 19, a "pilot" container ship arrived at the Port of Murmansk carrying cargo for the automotive industry. Of course, the scale is not yet comparable to traditional maritime routes, but the Arctic direction is clearly becoming an additional delivery option.

On the whole, it is difficult to call Russian export logistics completely stable today. The eastern direction is growing, but its infrastructure is operating at high capacity. Southern ports are capable of handling large volumes, but this summer they bore a significant portion of infrastructural and insurance risks. The Caspian route is developing rapidly, but it is still smaller in scale. The Baltic region has free capacity for certain types of cargo; however, its potential is limited by port specialization and railway infrastructure links. This is precisely why the very logic of route selection changed in the summer of 2026. Previously, the calculations centered on the lowest shipping cost. Today, businesses must evaluate multiple scenarios simultaneously: the base route, alternative routes, switching costs, additional time buffers, and total logistics costs.

This shift is particularly evident for major exporters. Oil companies must, quite literally, manage port and tanker operations while accounting for the risks associated with specific maritime areas. Coal companies remain tied to the Eastern Range and Far Eastern transshipment hubs. Fertilizer producers utilize several port routes at once. Agricultural holdings have to factor in seasonal peaks and the readiness of infrastructure to quickly handle large shipments of grain. Meanwhile, metallurgical companies work with a combined mix of rail, port, and container services.

The summer season of 2026 revealed another important characteristic. The Russian export system possesses a significant amount of flexibility, but this flexibility comes at a cost. Shifting cargo to a different port requires time and additional transport resources, and it often increases the shipping distance. Therefore, developing alternative routes is essential not only during periods of large-scale disruptions. A reserve capacity must exist in advance and have a clear economic rationale.

For businesses, the main takeaway is quite pragmatic. Russian exports continue to handle large volumes, geographies are gradually expanding, and new corridors are gaining traffic. At the same time, the cost and reliability of a route are becoming independent competitive factors. An exporter capable of quickly rerouting cargo flows between ports, railway networks, and international corridors gains extra resilience and more opportunities when securing foreign trade contracts. In this sense, the

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summer of 2026 served as a unique test for Russian international logistics. The next stage of development will be defined not so much by the search for a single efficient route, but by the creation of a system capable of supporting multiple routes simultaneously.

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