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The Logistics of Forced Diversification: Preliminary Results of 2026 and the Outlook for 2027

The outgoing year marked a tectonic shift for Russian export logistics. What began as a summer "fine-tuning" escalated into an emergency overhaul of the system, driven primarily by the southern vector; some experts even claimed that the Black Sea hub had effectively broken down. The market was forced into crisis mode to find alternative routes, as Baltic, Caspian, and Far Eastern ports continued to absorb redirected cargo volumes.

September grain export statistics highlight the scale of these changes. According to the Russian Grain Union, Novorossiysk shipped 177.8 thousand tons of grain during the month, compared to nearly 2.4 million tons the previous year. Total exports of key grain types plummeted 3.8-fold to 1.7 million tons. Meanwhile, Ust-Luga handled 530.2 thousand tons, and Vysotsk processed 342 thousand tons—these two Baltic ports combined accounted for roughly half of all September shipments.

These figures illustrate both the market's capacity for rapid adaptation and the inherent limits of such adjustments. Rerouting cargo can be achieved much faster than building new terminal infrastructure, securing additional rolling stock, or establishing stable vessel call schedules. Even when an alternative port possesses available transshipment capacity, the entire supply chain must handle the required volume and timelines at every single stage—from the station of origin to the final buyer.

Therefore, evaluating an alternative route solely by tariff or distance is risky. Today, exporters particularly care about the total

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cost of delivery: the rail tariff, shunting operations (spotting and pulling of railcars), transshipment, storage, freight, insurance, additional operations, and the cost of capital while the cargo is in transit. A longer route increases working capital requirements; a delay can lead to missing the contract window or incurring additional storage costs. For bulk commodities, even a slight increase in the cost per ton can noticeably impact the deal's margin.

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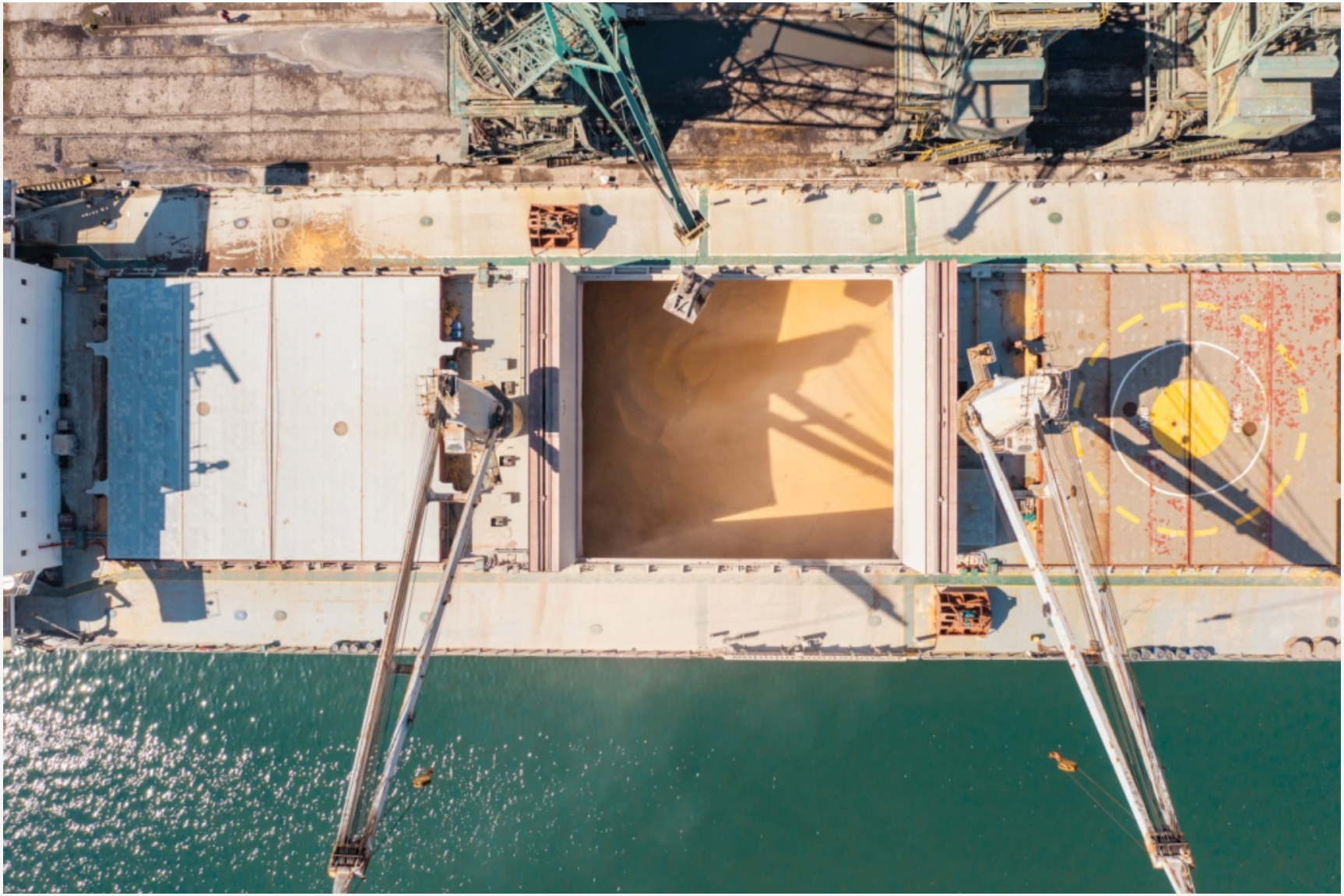

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Furthermore, alternative destinations are not interchangeable. The Baltic region can absorb a portion of grain exports, but its capacity depends on terminal specialization, rail connectivity, and vessel availability. The Far East is crucial for trade with Asian markets; however, the rail infrastructure is already operating under conditions where different types of cargo compete for throughput capacity. The Caspian route is suitable for specific flows to Iran and neighboring countries, but it cannot replace the southern seaports for all commodity groups and markets. The Northern Sea Route (NSR) is developing: in September, the head of Rosatom estimated the potential traffic volume for 2026 at over 40 million tons. However, the total tonnage of the NSR by itself does not mean the route is accessible to any exporter: the commodity mix, seasonality, ice conditions, fleet availability, and schedules all matter.

The container shipping market requires a tailored approach. In August, FESCO reported on the expansion of rail and intermodal services via Vladivostok and St. Petersburg to deliver cargo to southern Russia, as well as the organization of shipments from southern regions to Asia via Vladivostok. This is an example of an operator creating additional cargo transit options without waiting for large-scale infrastructure construction. However, the mere availability of a service does not guarantee the necessary shipping frequency, competitive pricing, or sufficient capacity during peak periods. Before switching, shippers should request confirmed timelines, available volumes, the list of restrictions, and liability terms for delays from the operator.

Similar caution is needed when evaluating new international opportunities. In October, US President Donald Trump announced an agreement on Russian diesel fuel supplies to the global market: the initial volume exceeds 300,000 tons, followed by a projected 500,000 tons in November, and up to 1 million tons in subsequent months. Reuters noted that actual deliveries depend, among other things, on the condition of Russian oil refining capacities and logistical constraints. For exporters, this is currently a reason to monitor changing conditions rather than treating the entire announced volume as a guaranteed freight flow. The political decision, fuel availability, refinery readiness, tanker fleet, insurance, and payment schemes must all align simultaneously.

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Thus, the main outcome of 2026 is the forced shift in export geography. Volume growth has taken a back seat, while logistics has emerged as an independent factor of competitiveness.

It appears that Russian export logistics will enter 2027 with a new set of restrictions. The primary question for businesses now is how much this restructuring will cost and how reliably it can ensure the execution of export contracts. In 2027, infrastructure projects may expand route options, but commissioning deadlines and actual carrying capacity require independent verification. For instance, the Institute for Economy and Transport Development previously forecasted that container shipments across the Russian Railways (RZD) network could reach 8 million TEU in 2027. However, this is a network-wide forecast rather than a guarantee of available capacity on any specific route. Planning an export transaction requires data on the specific section, station, terminal, and shipping window.

What should exporters do right now? First, map out the critical points along the route and identify which of them have the potential to halt shipments. Second, secure a backup option with the operator, terminal, and carrier well in advance. Third, compare routes based on total cost and transit time, factoring in inventory financing and potential penalties. Fourth, incorporate procedures into contract management for changing the point of shipment, allocating additional expenses, and resolving delays. Finally, regularly recalculate route economics: tariffs, rolling stock availability, and insurance terms are changing faster than new infrastructure is being built.

It should be added that diversification in itself does not eliminate logistics risk. It helps manage it only if a backup route is actually available, its cost is known in advance, and switching to it does not require rebuilding the entire supply chain from scratch. In 2027, the advantage will go to those Russian companies that evaluate logistics as an integral part of the export contract economics: maintain several workable scenarios, understand the price of each, and make decisions before a constraint turns into a supply disruption.

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