

## **Состояние автомобильного рынка России: тенденции и пути развития**

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**Аннотация.** В статье проведен ретроспективный анализ состояния автомобильного рынка в России в последние 10 лет, выделены основные причины роста и падения авторынка и автопрома в России в разные периоды. Сформулированы основные тенденции на авторынке, характерные началу 2022 года. Систематизированы основные проблемы в сфере отечественного автопрома и экспорта автомобилей. Предложены пути развития отечественного автомобильного рынка.

**Ключевые слова:** Автомобильный рынок, российский автопром, импортозамещение, Covid-19, санкции.

## **The State of the Russian Automotive Market: Trends and Ways of Development**

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**Abstract:** The article provides a retrospective analysis of the state of the automotive market in Russia in the last 10 years, highlights the main reasons for the

growth and decline of the car market and the automotive industry in Russia in different periods, identifies the main trends in the car market characteristic at the beginning of 2022, systematizes the main problems in domestic automotive industry and the car export, proposes the ways of development of the domestic automobile market.

**Keywords:** Automotive market, Russian automotive industry, import substitution, Covid-19, sanctions.

The automotive industry is one of the key sectors of the Russian economy. According to the automotive industry, it is possible to judge the country's economic development, the quality and development of the domestic and foreign automotive market. Thus, by the end of 2021, the automotive industry accounted for 1.5% of Russia's GDP. At the same time, the entire GDP of the country for 2021 amounted to 130.8 trillion rubles (+4.7%) [1]. In the world ranking of automotive production, Russia took the 11th place with China, the USA, Japan, India and South Korea topping the rating. Despite the leadership of other countries in the automotive industry, the car market is significantly developed in Russia. Thus, millions of people work in areas related to the automotive industry, car sales, transport and logistics services provision. The Russian automotive market is very promising, which is proved by the rise of the Russian automotive market in 2011 – 2013.

Many Russian scientists, including V.A. Vertogradov [2], N.P. Kiseleva [3], I.B. Leyzin [4], etc., were engaged in research on the state and prospects of the domestic car market. The works of D.V. Nelin [5], Yu.A. Hegai are devoted to the analysis of the way out of crises in the automotive industry and the car market. [6], Pasko A.V. [7], etc.

There are four segments in the Russian automotive industry:

- Passenger cars and passenger commercial vehicles segment;
- Truck segment;
- Bus segment;
- Special-purpose vehicles segment (vehicles that perform non-standard functions for vehicles or are engaged in the transportation of non-standard goods) [3].

The Russian passenger car market developed in 2011-2013 due to the successful recovery after the global economic crisis of 2008. The country's economy began to grow rapidly; the population income began to recover, and in some cases even increased. The anti-crisis measures introduced for business, among other things, determined acceleration of the automotive industry recovery. The refinancing rate of the Central Bank of Russia in 2012 was about 8.5%, which provided relatively easy access to cash for businesses and the public. The indicator of economic growth at the end of 2011 was 4.3%, at the end of 2012 – 3.4%, which significantly exceeded the indicators of many developed countries, including the United States (2011 – 1.8%, 2012 – 2.8%) [8].

The next sharp change in the domestic automotive market was the crisis of 2014 (Fig.1). According to the results of 2014, not only the decline in car production in Russia, but also the domestic passenger cars sales became a record.

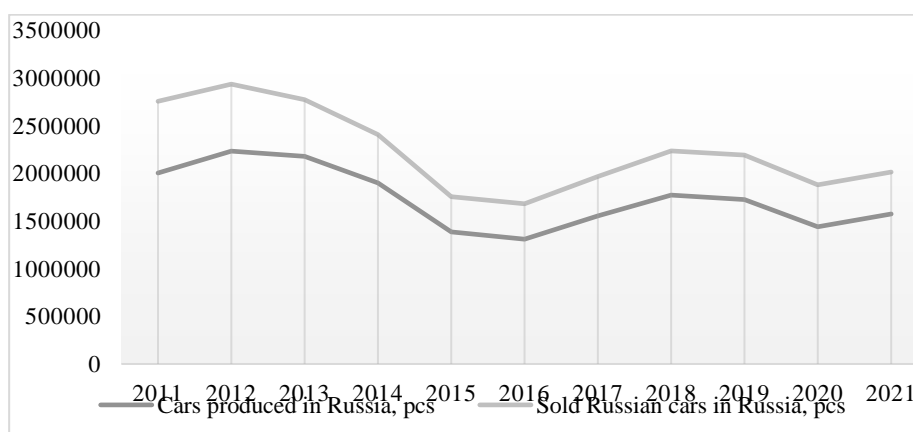


Figure 1 – The number of domestic passenger cars produced and sold in Russia in the period from 2011 to 2021 [9].

In the period from 2015 to 2016, demand for domestic cars in Russia began to recover, despite the fact that it still remained at a low level. So, according to the results of 2016, a minimum was recorded immediately for the production and sale of domestic cars in Russia. First of all, this was due to the stagnation in the economy, including the population incomes growth in Russia in 2015-2016. After the crisis, households switched to economy mode, which significantly reduced the demand for cars in general. However, car sales figures would be significantly lower if it were not for the

state support programs aimed at stabilizing the economy, including the automotive market. Programs focused on recycling and trade-in had an effective impact on maintaining balance in the market.

Since 2017, growth has begun in the Russian automotive industry, supported by the active sale of domestically produced cars. However, it is worth noting that the domestic auto industry is almost constantly working primarily to meet the domestic market needs, the size of exports has not changed practically throughout the analyzed period.

Significant reasons for the market decline in 2020 were the cancellation of state programs for recycling and trade-in [10], the suspension of production due to the Covid-19 pandemic. Firstly, with the successful implementation of state programs, the cost of domestic cars became more attractive for customers, and in case of their cancellation, the population went to the market of foreign passenger cars. Secondly, the Covid-19 pandemic had had an impact on all sectors of the world economy. Almost all markets were affected, including automotive and related ones. At the end of 2021, the Russian car market was again in demand among customers and restored its supply, thanks to state support, including preferential lending programs, anti-crisis measures.

By 2022, the car market in Russia has achieved stable sales, which makes it possible to plan future market results, though for 10 years it has not been possible to achieve record sales figures of 2012 (Fig.2). By the end of 2021, a total of 1.7 million cars were sold in Russia, about 26% of those were domestic. At the same time, during all the analyzed periods, this share does not change significantly, that is, it remains within 30%. Meeting the main demand of Russian customers occurs at the expense of the foreign automotive industry.

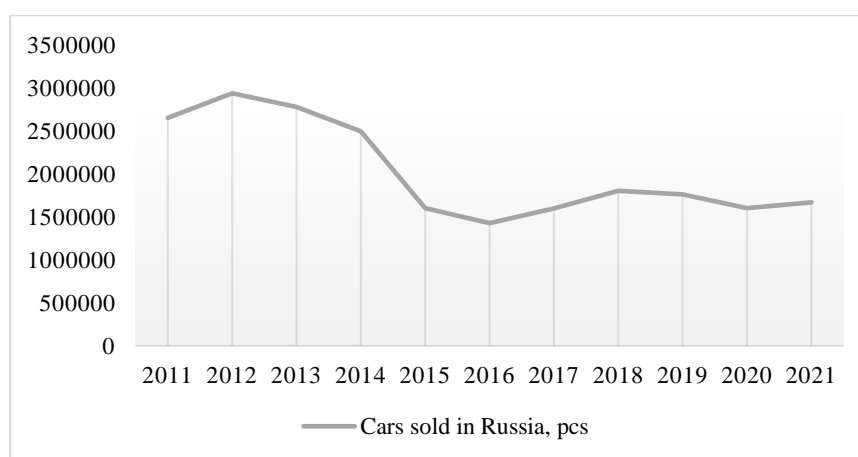


Figure 2 – The number of cars sold in Russia from 2011 to 2021[9].

The following trends in the passenger car market can be observed at the beginning of 2022:

- *Decrease in demand for cars in Russia.* In the first quarter of 2022, almost half as many cars were sold in Russia as in the same period of the previous year. Taking into account the fact that the economy was recovering in the first quarter of 2021, the indicator of the beginning of 2022 leaves much to be desired. At the same time, the number of domestically produced cars sold in Russia is also almost two times less than at the beginning of 2021 (Table 1).

Table 1 – The main indicators of the Russian automotive market in the 1st quarter of 2021, 2022 [9].

Indicator	Beginning of 2021 (January-March)	Beginning of 2022 (January-March)
Production of new cars, pcs.	35 507	30 835
Share of imported cars sold, %	74.34	75.79
The share of Russian cars sold, %	25.66	24.21
Results of car sales in Russia, pcs.	387 322	206 011
Results of sales of Russian cars in Russia, pcs.	99 396	49 883

The reasons for the decline in demand for cars in Russia were, first of all, the tightening of monetary policy, sanctions against domestic companies, as a result, buying a car became not prior for households. The real incomes of the population fell, a strong increase in prices for essential goods began, which led to a decrease in purchasing power.

- *Decrease in the number of passenger cars produced in Russia.* The Russian automotive industry primarily responds to the demand. As the population demand for the automotive industry resumed its decline, the automotive industry responded by reducing the number of passenger cars produced. So, the difference between the beginning of 2021 and 2022 was about 5,000 cars produced. If the demand for cars continues to fall, the decline in the new cars production may continue.

- *Increased sanctions against domestic automobile manufacturers.* These market restrictions affect the export market of Russian cars and the import of parts.

- *Suspension of production in Russia of foreign companies.* The following companies have suspended production and import on the territory of Russia: Volvo, Audi, Renault, General Motors, Jaguar Land, BMW, Ford, Scania, Toyota, Honda, Suzuki, Mercedes-Benz, Volkswagen, Skoda, Porsche, Rolls-Royce [11]. At the same time, some domestic automakers were forced to suspend work due to the lack of supplies of components and parts for production.

- *Increase in the cost of passenger cars.* According to the results of the first quarter of 2022, the price increase in the car market turned out to be insignificant, but there was already a shortage of some components and parts, which would soon lead to an even greater increase in car prices.

- *Import substitution of components and equipment in the automotive industry.* The introduction of sanctions contributed to the Russian automotive industry transition to the import substitution policy. At the moment, there is an active re-equipment of Russian automotive industries with domestic equipment, the search for new components and parts.

Tightening external conditions definitely slows down the Russian automotive market growth, but gives many opportunities for its development. The extended

experience of previous overcoming allows us to apply various measures and methods that were the most effective in the past, and therefore this crisis in the Russian automotive market will not be long. Besides, it is worth noting that practice shows, the market shows the greatest growth after the crisis moments, which again gives hope for early stabilization and adaptability to new market conditions. The main development directions of the Russian car market at the moment should be aimed at import substitution and the search for new suppliers and partners. The suspension of foreign car brands deliveries may accelerate the increase in demand for domestic cars. However, for the healthy development of the economy, the market should not be monopolized, which can be achieved by engaging new collaborations.

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