

MONITORING OF RUSSIA'S ECONOMIC OUTLOOK:

TRENDS AND CHALLENGES OF SOCIO-ECONOMIC DEVELOPMENT

No. 10(166) December 2023

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Monitoring of Russia's Economic Outlook

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1. INDUSTRIAL PRODUCTION DYNAMIC IN Q3 2023

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In Q3 2023, the trend component of industrial production posted 1.28% growth (September 2023 vs. June 2023). The main contribution to the dynamic was made by the industries related to the production of products for the state defense order (manufacture of motor vehicles, fabricated metal products, electrical equipment), and industries with active import substitution (manufacture of equipment, machine building, production of durable goods for households); the extractive sector demonstrated about zero growth rates. The decline in productivity and quality of labor resources may become the risk factors for further growth in the long term.

To provide accurate interpretation of trends in individual industries we decompose their output into calendar, seasonal, non-recurrent and trend components¹. The interpretation of the latter is of particular interest. Experts of the Gaidar Institute have singled out the trend components from all of manufacturing industries indices for 2003–2023² based on statistics released by Rosstat.

The resulting series for the industrial production index on the whole are presented in Fig. 1. Shown in Fig. 2 is the result for aggregate indices of the extractive and manufacturing sectors and production and distribution of electricity, gas and water. The results for the decomposition of other series are presented in Table 1.

In Q3 2023, the trend component of the industrial production index showed a slow growth of 1.28% (September 2023 vs. June 2023). Growth was observed in most manufacturing industries, as well as in the production and distribution of electricity, gas and water. In contrast, the industries related to mining and processing of minerals registered about zero growth rates during this period.

A negative impact on the dynamics of production in the mining sector was caused by the extension by Russia of the voluntary

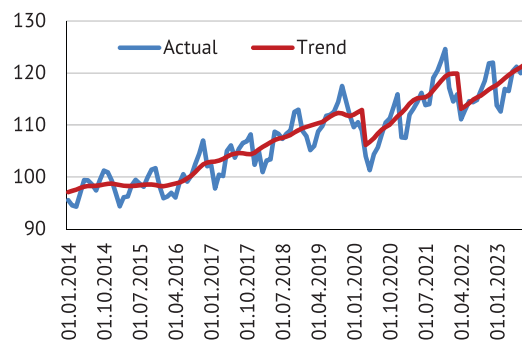


Fig. 1. Industrial Production Index Dynamic in 2014–2023(actual data and trend component), % to the 2916 average annual value

Sources: Rosstat, own calculations.

1 “Trend component” is a well-established term in the literature; however, it is noteworthy that this component is not a “trend” in a strict sense and is used in econometrics for analyzing time series: in this particular case, it is the remainder after the time series have been cleared from calendar, seasonal and non-recurrent components. It is incorrect to use the “trend component” for forecasting time series: for most industrial production indices it is time-varying in levels (and time-invariant in differences), but can be used for interpreting short-term dynamics and for comparison with events that have taken place.

2 The trend component was determined using Demetra package with the X12-ARIMA procedure.

cut in the oil production by 500,000 barrels per day for the third time¹ until the end of 2024 (excluding gas condensate). Coal mining made a positive contribution to the trend component of the mining production index, with a slight rise due to an increased demand from China that intensified its safety inspections at mines due to a number of emergency incidents during the year,² and increased demand from India on the back of a higher steel production.³

At the end of Q3 2023, the trend component of the manufacturing sector demonstrated growth. It was observed in all industries except for pulp and paper production and production of coke and oil products. The decline continued in pulp and paper production due to the issue with the supply of chemicals, spare parts and the ban on the export of wood pulp from Russia to the EU. In production of coke and petroleum products, the near-zero growth rates are very likely related to the expectation of changes in the parameters of tax legislation.

Significant growth of the trend component of the production indices was observed in the manufacture of motor vehicles (in September 2023 against the same period of the previous year, the growth amounted to 65.1%), manufacture of finished metal products (annual growth in September 2023 amounted to 32.2%), manufacture of electrical equipment (30% growth), chemical production (21.2%). The main contribution to the indicators continues to be made by the products directed to the needs of the defense industry followed by related industries (metallurgy and chemistry), in addition growth was noted in the sectors that provide import substitution (equipment manufacturing, machine building, as well as the production of durable goods for households).

Other industries also show an increase in the trend component in Q3 2023. The exceptions are freight transportation and agriculture. The trend component of freight turnover shows about zero growth rates in Q3 2023, which is due to the reduction in supplies of minerals, including oil, gas, metals as a result of the

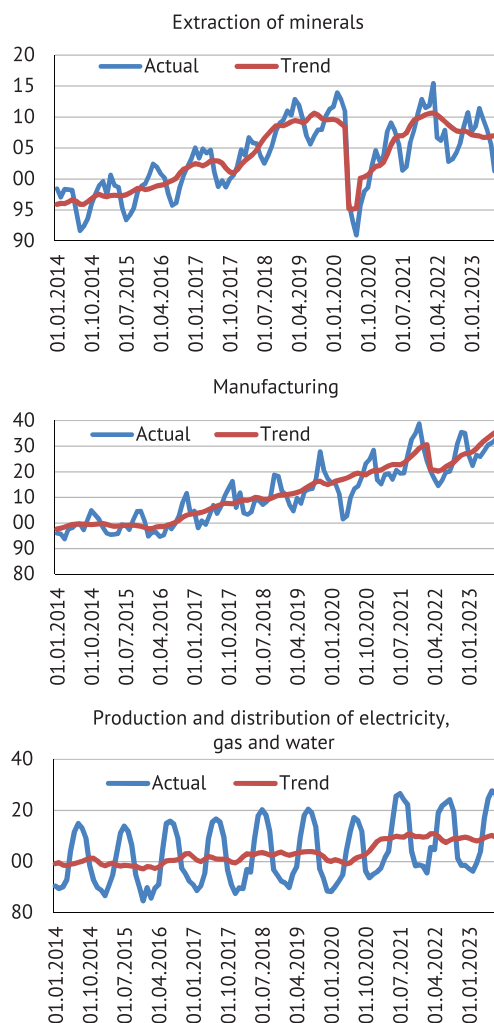


Fig. 2. Production indices dynamic across sectors, 2014–2023 (actual data and trend component), % to the 2016 annual average value

Sources: Rosstat, own calculations.

1 On March 1, 2023, Russia voluntarily cut oil production by 500,000 barrels per day. The first time the decision was extended until June 2023, the second – until the end of 2023 and the third – until the end of 2024. The cut was implemented from the production level agreed on June 4, 2023 (i.e. from 9.8 mln bpd).

2 Milkin V. Russian coal export prices turned to growth in the third quarter // Vedomosti. 25.09.2023. URL: <https://www.vedomosti.ru/business/articles/2023/09/25/996848-eksportnie-tseni-na-rossiiskii-ugol>

3 Milkin V. Russia more than doubles metallurgical coal exports to India // Vedomosti. 23.10.2023. URL: <https://www.vedomosti.ru/business/articles/2023/10/23/1001892-eksport-metallurgicheskogo-uglya-v-indiyu>

1. Industrial production dynamic in Q3 2023

Table 1

Output index change across economic sectors, %

Name of sector	Share of industrial production index	September 2023 on September 2022	September 2023 on June 2023	Change over past months
Industrial production index		105.64	101.28	slow growth
Extraction of minerals	34.54	99.23	100.01	stagnation
Manufacturing, including:	54.91	110.47	102.47	growth
Production of food products, including beverages and tobacco	16.34	113.09	102.98	growth
Textile and garment industry	1.14	110.07	104.45	growth
Manufacturing of leather, articles thereof and footwear	0.27	116.14	102.44	growth
Wood processing and woodware manufacturing	2.02	111.65	102.48	growth
Pulp-and-paper industry	3.35	78.34	95.44	recession
Production of charred coal and petrochemicals	17.25	100.75	100.17	stagnation
Chemical industry	7.56	121.20	105.55	growth
Manufacturing of rubber and plastic articles	2.14	116.09	101.79	growth
Manufacturing of other nonmetallic mineral products	4.02	106.41	99.83	growth
Chemical industry	17.42	132.15	106.07	growth
Manufacturing of rubber and plastic articles	6.97	111.41	103.39	growth
Manufacturing of other nonmetallic mineral products	6.27	130.00	104.38	growth
Chemical industry	6.75	165.07	109.68	growth
Manufacturing of rubber and plastic articles	2.42	121.91	106.78	growth
Electricity, gas and water supply	13.51	99.30	98.52	growth
Wholesale trade		122.50	103.50	growth
Retail trade		111.84	102.35	growth
Cargo turnover		100.87	100.24	stagnation
Construction		108.98	102.02	growth
Agriculture		99.83	99.93	stagnation
Volumes of paid services to households		105.19	100.95	slow growth

Sources: Rosstat, own calculations.

imposed sanctions, and low capacity of railroads in the eastern direction. The trend component of the agriculture sector shows about zero growth rates due to the high base of the previous year (record harvest in 2022 of cereals, oilseeds, vegetables and potatoes).

Possible risks to the unsustainability of industrial growth in the near term include the following¹:


- skilled labor shortages. Among the reasons are: the demographic hole of the 1990s, increased mortality during the coronavirus pandemic, relocation and partial mobilization, which were superimposed on the growing demand for labor in industrial sectors on the back of to the expansion of import-substituting industries. The greatest shortage of personnel is observed in the machine-building and chemical industries, many enterprises are forced to work in several shifts to fulfill orders received from the state.² The inability to provide new production facilities with labor force compels to reduce the requirements to the competencies of

1 Tsukhlo S. More than a third of enterprises called the ruble exchange rate an issue // 24.10.2023. URL: <https://www.iep.ru/ru/kommentarii/sergey-tsukhlo-bolee-treti-predpriyatiy-nazvali-kurs-rublya-problemoy.html>

2 Experts described the strategies of companies in conditions of personnel shortage / How employers adapt to the "job seeker's labor market"// RBC. 06.10.2023. URL: <https://www.rbc.ru/economics/06/10/2023/651e85539a794798a8d17162>

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the personnel, as a result of which the productivity and quality of labor decreases;

- difficulties with access to financing.¹ In particular, the growth of the key rate of the Central Bank of the Russian Federation, which limits many manufacturers in borrowed capital that may affect the reduction of investment in machinery and equipment (in modernization of production). Under the current conditions, only highly profitable producers (enterprises in the following sectors: mining, food industry, services) and those who are subsidized by the state (mainly manufacturers of products for the needs of the military-industrial complex) have the opportunity to borrow at such a rate;
- lack of necessary raw materials and spare parts for manufacturing. For example, in agriculture, there is a shortage of certain types of seeds and a reduction in livestock, which could potentially reduce food industry output and contribute to price increases.² 

1 *Konopliyanikov A.* The Key Rate and the Economic Growth // *Vedomosti*. 20.09.2023. URL: <https://www.vedomosti.ru/opinion/columns/2023/09/20/995996-klyuchevaya-stavka-i-ekonomicheskii-rost>

2 Russians warned of beef price rise by the New Year // *Vedomosti*. 26.11.2023. URL: <https://www.vedomosti.ru/economics/news/2023/11/26/1007736-rossii-predupredili>

2. THE PRELIMINARY RESULTS OF RUSSIA'S FOREIGN TRADE IN 2023. TRADE TURNOVER WITH CHINA

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Based on the results of 2023, Russia's exports are projected at the level of \$420 bn (down 29% relative to 2022), that is, a return to the level of the pre-Covid 2019. Starting from Q1 2023, imports have been declining from the peak values owing particularly to the weakening of the Russian ruble exchange rate; the annual volume of imports of goods is expected to amount to \$285 bn (an increase of 10% relative to 2022). Russia's key trade partner is China whose share in the trade turnover based on the results of January through October 2022 is estimated at 32%: 41% in imports and 26% in exports. Russia's share in China's trade turnover (5.1% in imports and 3.3% in exports) is much smaller than that of the main unfriendly countries and there are risks of declining trade in case of secondary sanctions. The discount on Russian oil on the Chinese market decreased to 4% in autumn 2023 from 9% and 11% in H1 2023 and H2 2022, respectively. Supplies of cars and trucks from China saw large-scale growth (an eightfold increase as compared with 2021).

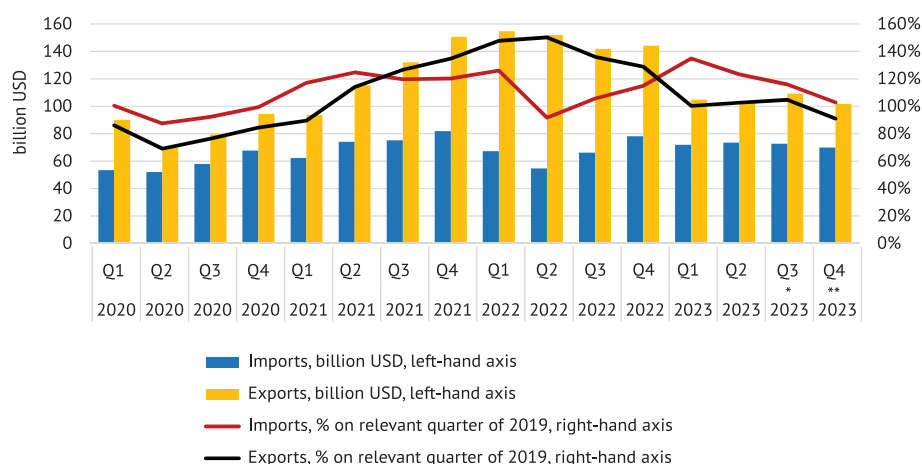
Dynamics of Russia's trade turnover

In the past few years, dynamics of exports were unstable. After shrinking considerably during the pandemic (relative to the base 2019), exports in value terms saw sustainable growth owing to appreciation of prices for energy commodities on the back of recovery of global demand. Lack of stability in 2022 consolidated the effect of the price factor which led to the record values of exports in the mid-year followed by a correction phase. Starting from Q1 2023, Russian export volumes have been at the level seen in 2019 (Fig. 1). Overall, in 2023 the volume of exports is expected¹ at the level of \$420 bn, a decrease of 29% and 15% as compared with 2022 and the pre-crisis 2021, respectively.

During the pandemic, imports were declining in a similar way below the baselines (2019). After the easing of anti-Covid restrictions, in 2021 the volumes of imports of goods to Russia surpassed the baseline level owing in particular to global inflation growth and the effect of pent-up demand. After the start of hostilities and introduction of sanctions and logistic constraints, imports fell dramatically, but started to recover as early as Q3 2022, partly owing to a considerable appreciation of the ruble during this period. As a result, in Q1 2023 imports set a record (135% relative to the level seen in 2019), but on the back of depreciation of the ruble exchange rate and exhaustion of the effect of pent-up demand they returned to the baseline levels of 2019. A large portion of goods, including those brought in within the scope of parallel imports are still

¹ The estimate for 2023 was received on the basis of the Federal Customs Service's data for Q3 and the Central Bank of Russia's data on monthly volumes of exports and imports in January-November 2023. The projected volumes of December are calculated on the basis of the values for October-November with historical seasonality taken into account (an average share of December in the volumes of imports and exports in Q4 2012–2021). Additionally, an average excess (by 5.2%) of the imports estimate according to the methodology of the Central Bank of Russia over that of the Federal Customs Service is counted in.

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Note: It is taken into account that the Central Bank of Russia's data on imports are 3.9% higher than those of the Federal Customs Service (2019–2021);

* based on the Central Bank of Russia's estimate;

** based on the Central Bank of Russia's estimate for October and November with average shares of December in imports and exports in Q4 of the previous years taken into account.

Fig. 1. Dynamics of exports and imports in 2020–2023, % on the relevant period of 2019

Source: own calculations based on the data of the Federal Customs Service (till Q4 2021) and the Central Bank of Russia.

supplied at higher prices because of additional logistics and transaction costs and sanctions risks, that is, physical volumes of imports are currently lower than those in 2019. Yet, we can say that the crisis is overcome as regards most goods items, while weak current dynamics can be explained by depreciation of the ruble exchange rate. Based on results of 2023, imports are projected at the level of \$285 bn, an increase of 10% in imports of goods as compared with 2022.

Russia's share in the trade turnover with China

In 2022 China became Russia's main trade partner, leaving behind the European Union. According to the data of China's Customs Head Office (CCHO),¹ based on the results of January through October 2023 China's share in trade with Russia can be estimated at 32%, 41% in imports and 26% in Russian exports. At year-end, trade turnover with China is estimated at \$225 bn (+22% relative to 2022 and +60% relative to 2021) with roughly equal imports and exports.

For China, Russia is a less important partner in trade turnover (3.9% in January–November 2023): Russian goods account for 5.1% of China's overall imports, while the Russian sales market, for 3.3% of China's exports. The leading positions in China's trade turnover are held firmly by countries which are unfriendly to Russia: the EU (13.2%), the US (11.2%), Japan (5.4%), South Korea (5.2%), Taiwan (4.5%) and Australia (3.9%). Taking into account their shares in the trade turnover and a higher extent of substitutability of primary commodities as compared with manufactured goods, it can be said that China's dependence on supplies of manufactured goods from unfriendly countries surpasses considerably its dependence on imports of Russian raw materials. So, there are risks of secondary sanctions affecting the mutual trade between China and Russia, particularly, if imposed against individual companies.

¹ The data provided by CCHO are adjusted with taking into account the fact that in 2019–2020 the data on imports of Russian goods were on average 14% higher than those of the Federal Customs Service, while the data on China's exports to Russia were on the contrary 8% lower.

2. The Preliminary Results of Russia's Foreign Trade in 2023



Fig. 2. Russian exports to China in 2019–2023

Source: own calculations based on the data of China's Customs Head Office.

Export supplies to China¹

In January through October 2023, China's imports of Russian goods amounted to \$106.3 bn (+13% on the relevant period of 2022 and +69% relative to 2021 r.) of which fuel accounted for 70%, that is, \$81.8 bn (+11% and +78%, respectively) (Fig. 2).

The main growth driver of exports to China was the reorientation of Russian fuel exports from unfriendly countries' markets. Russia's share in the overall volume of China's fuel imports increased to 18.4% (+2.3 p.p. relative to January-October 2022). In January-October 2023, Russia accounted for a considerable share in imports of coal (37%, +1.5 p.p.), petrochemicals (26.8%, +10.6 p.p.), crude oil (17.6%, +1.3 p.p.), aluminum (23.4%, +12.7 p.p.), wood (10.6%, -0.2 p.p.), nickel (9.2%, +1.4 p.p.) and copper (5.1%, +1.0 p.p.). So, we can say that the presence of Russia's main export goods on China's commodity markets has increased.

It is noteworthy that physical volumes of exports of all types of fuel have increased.² In January through October 2023, export supplies of coal amounted to 86 mn tons (+72% on the relevant period of 2022 and +93% relative to 2021). Average prices for Russian coal deviated from average prices for coal supplies from other countries in 2022, but no significant deviations have been observed since Q2 2023. LNG supplies amounted to 7.11 mn tons (+39% and +87% relative to 2022 and 2021, respectively), light distillates supplies (CN FEA 271012) grew to 3.0 mn tons (a 2.4-fold growth relative to 2022 and a 4.6-fold growth relative to 2021) and other petrochemicals (CN FEA 2710 except 271012) increased up to 8.5 mn tons (a 3.3-fold growth and a 7.5-fold growth, respectively).

The supplies of main metals saw mixed trends. China's imports of ferrous metals (CN FEA 72 and 73) from Russia shrank to 1,048 mn tons (-68% on January-October 2022 and -38% on the relevant period of 2021). The supplies of copper (320,000 tons, +18% on January-October 2022 and +6% on January-October 2021) and nickel (42,000 tons, +29% and -0.8%) returned to the level of the pre-sanctions period, while supplies of Russian aluminum increased to 1.0 mn tons (a 2.6-fold growth on the relevant period of 2022 and a 3.4-fold growth on 2021).

¹ Further based on the data of CCHO without adjustment to average differences between the data of CCHO and the Federal Customs Service in the previous years.

² Data on pipeline gas are not available.

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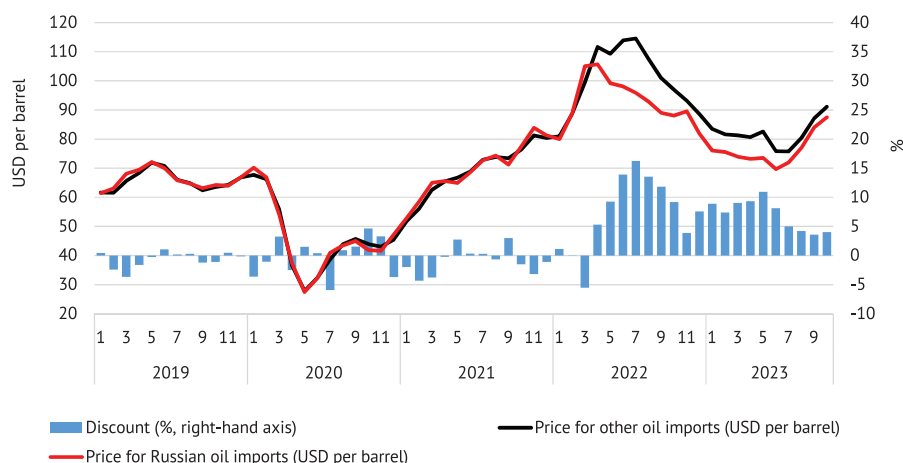


Fig. 3. Prices for and discount on Russian oil supplied to China in 2019–2023

Source: own calculations based on the data of China's Customs Head Office.

Discount on oil

Crude oil is the main commodity of China's imports from Russia: over 46% of Russia's oil supplies go to China (\$49.2 bn out of \$106.4 bn). In January-October 2023, Russia supplied 88.5 mn tons of oil (+22.9% on the relevant period of 2022 and +34.7% on 2021). Insignificant deviations of the average price for oil supplied from Russia and other countries did happen during the periods of high volatility of prices for oil and can be explained by time unevenness of oil imports during a monthly period. Before April 2022, there were no systematically sustainable deviations of average prices for Russian oil from those for oil supplies from other countries. But since March 2022 Russian oil has been supplied to China with a discount which amounted to 16% in summer 2022, while by the end of the year it decreased to 4%–9%. With the embargo on Russian oil supplies to the EU introduced, the discount increased again to 11% in May 2023. The discount on Russian oil has been evenly decreasing since June 2023, amounting to 4% in September-October (Fig. 3). As a result, we estimate the overall discount for January-October 2023 at \$3.7 bn, while that for March-December 2022 at \$5.3 bn.

Supplies from China

After the turbulent H1 2022, supplies of Chinese goods to Russia were steadily increasing till the mid-2023 and then stabilized at the level of 3.3% of China's exports (Fig. 4).

In January-October 2023, China's exports to Russia increased to \$90.1 bn (+51% on the relevant period of 2022 and +71% on 2021), of which machinery, equipment and transport vehicles accounted for \$54.9 bn (+81% and +100%, respectively).

Machinery, equipment and transport vehicles

This category of goods (without counting in classified commodity groups) accounts for over a half of imports from China (61%). One can see multiple growth up to \$8.7 bn in supplies of cars with an engine capacity of 1–3 liters (CN FEA 870322 and 870323), an 8-fold increase in car supplies as compared with the relevant periods of 2022 and 2021. Also, a substantial increase up to \$1.86 bn is evident in supplies of trucks (CN FEA 870423), a 2.2-fold growth and an 8-fold growth as compared with the relevant periods of 2022 and 2021, respectively).

2. The Preliminary Results of Russia's Foreign Trade in 2023

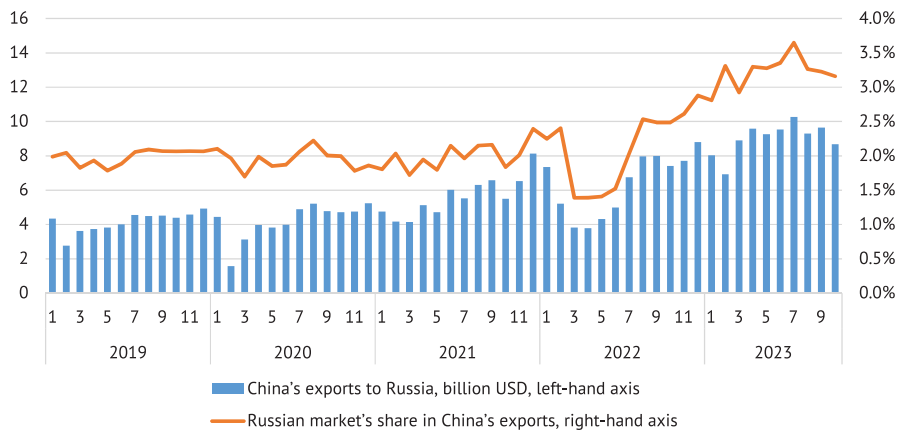


Fig. 4. Supplies of Chinese goods to Russia in 2019–2023

Source: own calculations based on the data of China's Customs Head Office.

As a result, based on the results of January through October 2023 the Russian market accounts for 32% of China's exports of cars (+20 p.p. to the share seen in 2021) and 45% of exports of trucks (+33 p.p. to the share in 2021), while as regards other large commodity groups the share of Russia in China's exports does not exceed 5%. As regards the automotive market, Chinese suppliers have taken advantage of the opportunities which opened up on the Russian market because of the exit of western brands, which situation led to a considerable appreciation of imports from unfriendly countries and shutdown of automobile plants in Russia.

Also, supplies of electrical machinery and equipment increased up to \$13.3 bn (+27% on 2022 and 2021) and those of mechanical equipment and devices, up to \$20.3 bn (+54% and +79%, respectively). ▀

3. TRENDS IN INTERNATIONAL MIGRATION IN RUSSIA IN Q1–3 2023

Igor Efremov, Researcher, the International Research Department of Political Demography and Macrodynamics, Gaidar Institute

In Q1–3 2023, the registered migration growth rate of the Russian population in long-term international migration declined by about half (or by 90,000) relative to the values of similar periods preceding the pandemic COVID-19. The number of arrivals in Russia from almost all countries, the main migration partners of Russia, decreased. The number of participants of the resettlement program also continued to decrease.

Statistics on permanent and long-term international migration, published by Rosstat, take into account permanent registration of migrants (and deregistration), as well as temporary registration of migrants for a period of 9 months or more. Thus, the data do not include immigrants who have been registered in Russia for less than 9 months, as well as emigrants from among the permanent residents of Russia who did not deregister when leaving the country.

The number of registered arrivals in the long-term international migration amounted to 412,000 in Q1–3 2023, having significantly reduced (more than by 20%) compared to a similar period of 2022, when 524,000 have been registered. At the same time, in Q1–3 2023 the number of registered arrivals decreased from all the CIS countries compared to the same period of 2022, except for Turkmenistan with the number of arrivals remaining virtually unchanged (*Table 1*).

In Q1–3 2023, statistics of international long-term migration accounted for 324,000 departures from Russia, however, it is difficult to compare them with indicators of 2022. In H2 2021, the Executive Order by the President of Russia¹ was in effect, extending deadlines for registration of foreign citizens in Russia (due to the consequences of the pandemic COVID-19). As a result, automatic registration of such departures took place already in 2022, thus actually overestimating the number of departures and reducing migration growth in H1 2022 (*Table 1*).

Due to the same reason the figures showing registered migration population growth in Russia in the statistics of long-term international migration in 2023 cannot be compared with 2022. The registered growth of the Russia population in the long-term migration exchange evidenced 89,000 in H1 2023 (*Table 1*). In the recent years preceding the pandemic COVID-19 the registered migration growth (calculated according to comparable methodology) accounted on the average for nearly 180,000 for the same period. Thus, migration growth in H1

1 Executive Order of the President of the Russian Federation of 15.06.2020 No.392 “On amendments to the Executive Order of the President of the Russian Federation of April 18, 2020 No. 274 “On temporary measures to regulate legal situation of foreign citizens and stateless persons in the Russian Federation due to risk of further spread of new coronavirus infection (COVID-19)”.

3. Trends in international migration in Russia in Q1–3 2023

Table 1

Indicators of long-term international migration in Russian, Q1-3 2022 and 2023, number of people

	Arrived in Q1-3		Departed in Q1-3		Migration growth in Q1-3	
	2023	2022	2023	2022*	2023	2022*
Total	412 206	523 964	323 534	545 103	88 672	-21 139
including:						
Azerbaijan	18 211	24 306	15 275	29 003	2 936	-4 697
Armenia	37 368	45 824	28 283	59 506	9 085	-13 682
Belarus	9 335	14 630	9 363	15 325	-28	-695
Kazakhstan	35 717	49 028	28 122	57 859	7 595	-8 831
Kyrgyzstan	40 892	43 811	33 229	55 738	7 663	-11 927
Moldova	16 525	18 332	10 259	17 230	6 266	1 102
Tajikistan	128 207	132 983	64 935	79 235	63 272	53 748
Turkmenistan	7 813	7 764	5 945	13 632	1 868	-5 868
Uzbekistan	32 246	39 818	30 296	51 519	1 950	-11 701
Ukraine	40 206	101 155	57 265	100 410	-17 059	745

* The figures for 2022 were distorted due to postponement of the deadline of registration of a large part of foreign nationals (and their departures, respectively) from 2021 to 2022.

Source: Rosstat. Socio-economic situation in Russia. January-October 2023. IV. Demography. Indicators of international migration. URL: <https://rosstat.gov.ru/storage/mediabank/osn-10-2023.pdf>

2023 has reduced approximately twice compared to previous years. At the same time, Russia retains growth in the migration exchange with the CIS countries, except for Ukraine and Belarus. The decline in the migration exchange with Ukraine is probably due, among other things, to the automatic attrition of migrants whose temporary registration was executed en masse last year and expired in the reporting period of 2023.

The registered migration decline in the exchange with Belarus was close to zero during this period. In the meantime, the number of participants in the resettlement program for those people, who have accounted for a significant part of the migration growth of the permanent population of Russia in recent years, continues to decline.

In Q1–3 2023, 34,400 participants of the resettlement program have been registered, while in the same period of 2022 there figures were 52,600, 60,200 in 2021 and 82,900 in pre-COVID 2019.¹

In autumn 2023, the Ministry of the Interior of the Russian Federation, responsible for migration records, has changed the form and frequency of statistical publication on migration. Instead of monthly, such publications became quarterly and contain less information. The latest quarterly publication reports that from January to October 2023 compared to the same period of 2022 the number of temporary residence permits issued to foreigners dropped by 54%, accounting for 72,000 and 12% of residence permits to stay in Russia, amounting to 228,000.

At the same time, the number of issued work permits increased by 29% (to 81,000) and by 4.5% (to 2 mn) the number of patents.² However, this information does not allow a full assessment of the evolution of these indicators,

1 Ministry of the Interior of the Russian Federation. Monitoring of the State program to assist the voluntary resettlement of Russians living abroad to the Russian Federation. URL: mvd.rf/mvd/structure1/Glavnie_upravlenija/guvm/compatriots/monitoring

2 Ministry of the Interior of the Russian Federation. Analytical brief on the performance of migration units of the territorial bodies of the Ministry of the Interior of Russia for January-October 2023. URL: mvd.rf/dejatelnost/statistics/migracionnaya/item/44633859/

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as the number of documents valid at the end of the reporting period was not published.

Overall, in Q1-3 2023, long-term registered international migration in Russia continues to show a downward trend in migration growth due to a marked decline in arrivals.

The internal distribution of long-term international migrants continues to shift primarily to Tajik nationals. The share of migrants from Tajikistan among those arriving in Russia is about 31%, while their share in the migration growth exceeds 70%. It should also be taken into consideration that a significant proportion of migrants are not accounted for in long-term international migration. This happens because some immigrants live in Russia for a long time, but possess a registration for less than 9 months, while other emigrants, do not deregister leaving Russia. 