

Business processes in oil complex of Russia and Northwest region



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Business processes in oil complex of Russia and Northwest region: market of oil production and refining, petroleum products, combustive-lubricating materials, biofuel and bunker market

Main research objectives are:

1. State estimation and development prospects of business processes in oil complex of Russia and Northwest region from standpoint of investment appeal.
2. Expediency definition and possibilities of investors penetrate to various sectors of the Russia oil complex.

The research period is 2003-2007. The general trends and development forecasts of Russia oil complex production-sales train are considered over near-term outlook.

Information sources:

1. Statistical data and forecasting information of Russian Federal State Statistic Service, Ministry of Economic Development and Trade, and Federal tariffs service; reports of the Russian Ministry of Agriculture; research results of International research projects center and Scientific Research Institute of territorial evolution and transport infrastructure; data of Russian Federal customs service, Saint Petersburg Oil Club, Russian Maritime Register of Shipping, and Energy Information Administration; legislative and legal texts of Russia, Saint-Petersburg and Leningrad region, recommendations of Russian Federal Antimonopoly Service.
2. Companies press releases, branch and expert estimations of mass-media.
3. Own informational resource and extensive enterprises database of Information Agency «CredInform – North-West».

General conclusions:

This marketing report presents business processes in various sectors of Russian oil complex, particularly:

Annually volumes of oil production in Russia grow 2.0% on the average. First of all experts connect this fact with oil export deliveries growth to foreign consumers. At the same time growth rate in oil-producing branch is kept at stably low level and made up 2.1% in 2007.

Manufacture of petroleum products in oil refining branch of Russia grows higher than its production. So, the share of petroleum refining in volume of oil recovery increased up to 46.6%.

The Russian combustive-lubricating materials market is in the stage of progress and differs higher attractiveness (growth in past year was 110.5%). Besides experts note stable growth of export combustive-lubricating materials deliveries from Russia. Also it is observed stable trend to increase of lubricants import to Russia, and to decrease of domestic producers share due to attractiveness of combustive-lubricating materials market, and also increase of foreign brands automobiles in Russia.

Manufacture and consumption of biofuel in Russia is complicated due to lack of corresponding legislative baseline. Today bioethanol and biodiesel market is on the stage of its formation: their manufacture is carried out in experimental purposes; machines working with biodiesel are tested; regional programs including factories construction plans are developed and etc. In addition, in Russia the positive factor of bioethanol and biodiesel manufacture at the first stage of implementation can become export to the EU countries.

Now the Russian bunker market is in the stage of its rapid development and is characterized by positive growth dynamic which main trends are: reinforcing attention to branch by the state; during last decades the ship fuel sales structure has essentially varied because of changes in a global merchant marine; demand and the basic sales volume of low-cost heavy fuel brands have grown; there is a stable growth of the market during last decade (on the average at the level of 4% per year).

There are two oil refining factories in North-West Federal District (NWFD), particularly: Kirishinefteorgsintez (OOO Kinef) located in the Leningrad region, and also Ukhtinskiy NPZ (Komi Republic). General power of two oil refining factories is 23.4 million tons of oil per year.

Today oil products deliveries market development has been resulted to market separate by a territorial principle. So, in North-West region experts choose Saint Petersburg (SPb) and Leningrad region by infrastructure development and fuel trade turnover.

Now refueling stations market of SPb and Leningrad region grows rapidly. During several years it will be still interesting in development of refueling stations along building western high-speed diameter and encircling highway around SPb and in Leningrad region. In feature Leningrad region will have large potential for developing of refueling stations network.

The brief information on the leading companies of the Russian oil complex is presented in the report as well. For more information on participants of the Russian oil complex see created by «CredInform – North-West» Companies Directories in which companies are grouped using main code of Russian National Classifier of Economic Activities (OKVED) and also Branch Enterprises Databases.

More detailed information on any firm can be received on-line at Agency website where in accessible form reference company data is presented not only, but also in comparative form its financial figures, foreign economic activity data and etc.

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