

# Business processes in oil complex of Russia and Northwest region

<https://marketpublishers.com/r/BD5A45E5F0AEN.html>

Date: June 2008

Pages: 205

Price: US\$ 5,088.75 (Single User License)

ID: BD5A45E5F0AEN

## Abstracts

Russian version is available for immediate delivery. We offer free translate into English. It will take one week.

**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:

State estimation and development prospects of business processes in oil complex of Russia and Northwest region from standpoint of investment appeal.

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:

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.

Companies press releases, branch and expert estimations of mass-media.

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 a 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.

## Contents

### **1. THE RUSSIAN FEDERATION OIL AND OIL-PRODUCING INDUSTRY**

- 1.1. The Russian crude oil production market
- 1.2. Basic evolution trends in the Russian oil-producing industry
- 1.3. Main participants of the crude oil production market and their short characteristic

### **2. THE RUSSIAN FEDERATION OIL REFINING INDUSTRY**

- 2.1. The Russian oil refining market (gasoline, diesel fuel, kerosene, black oil fuel)
- 2.2. Building, planning and projecting manufactures
- 2.3. Main operators of the oil refining market and their brief characteristic

### **3. THE RUSSIAN COMBUSTIVE-LUBRICATING MATERIALS (CLM) MARKET**

- 3.1. General characteristic of the Russian CLM market in 2007
- 3.2. Russian leading CLM manufacturers and suppliers and their brief characteristic.
- 3.3. Import CLM deliveries to Russia in 2007
- 3.4. Development prospects of the Russian CLM market

### **4. THE RUSSIAN ALTERNATIVE FUEL MARKET: LIQUID BIOFUEL (BIOETHANOL, BIODIESEL), SOLID FUEL (FUEL GRANULES OR FUEL PELLETS), GASEOUS BIOFUEL (BIOGAS)**

- 4.1. Biofuel: concept and its segmentation
- 4.2. State and development trends of the Russian bioethanol market in 2007
- 4.3. State and development trends of the Russian biodiesel market in 2007
- 4.4. The basic features of the Russian solid biofuel market in 2007
- 4.5. The basic features of the Russian gaseous biofuel market in 2007

### **5. THE RUSSIAN BUNKER MARKET**

- 5.1. Russian bunker market state in 2007
- 5.2. Russian ports and oil terminals
- 5.3. Development prospects of the Russian bunker market
- 5.4. Features of the bunker market in North-West basin
- 5.5. Leaders of the Russian bunker market and their characteristic

## **6. THE OIL REFINING MARKET IN NORTH-WEST FEDERAL DISTRICT (NWFD) OF RUSSIA**

- 6.1. State of the oil refining market in NWFD
- 6.2. Development prospects of the oil refining market in NWFD

## **7. REFUELING STATIONS MARKET OF NWFD OF RUSSIA**

- 7.1. NWFD refueling stations market state in 2007
- 7.2. NWFD refueling stations network development prospects
- 7.3. Local authorities policy and regional legislation regarding allocation of refueling stations construction land sites in SPb and Leningrad region
- 7.4. Refueling stations market leaders and their characteristic

## Tables

### TABLES

- 1.1. The proved world oil reserves as of the beginning next years during 2003-2007
- 1.2. Distribution of basic high-viscosity oil stocks in Volgo-Ural and Western - Siberian oil and gas basins
- 1.3. Oil consumption volumes in Russia during 2003-2007
- 1.4. Oil production volumes in Russia during 2006-2007
- 1.5. Operational drilling volumes of the Russian oil companies
- 1.6. Oil production in Russia for the period of January - March 2008
- 1.7. Average actual export oil prices change of Russia and world detailed on months 2007-2008 (3)
- 1.8. Rosneft oil production geography
- 1.9. Rosneft key figures in 2007
- 1.10. Lukoil oil stocks in 2003-2007
- 1.11. Lukoil key figures in 2007
- 1.12. TNK-BP oil stocks in 2003-2007
- 1.13. TNK-BP key figures in 2007
- 1.14. Surgutneftegaz oil stocks increase in 2003-2006
- 1.15. Surgutneftegaz key figures in 2007
- 1.16. Gazprom-neft oil stocks in 2003-2007
- 1.17. Gazprom-neft key figures in 2007
- 1.18. Tatneft key figures in 2007
- 1.19. OAO NGK Slavneft oil stocks in 2003-2007
- 1.20. OAO NGK Slavneft key figures in 2007
- 1.21. NK Russneft key figures in 2007
- 1.22. ANK Bashneft key figures in 2007
- 2.1. Oil refining volumes of main operators in 2006-2007
- 2.2. Russian leading oil products manufactures detailed on the annual turnover (TOP-10)
- 2.3. Rosneft oil products manufacture volumes in 2007
- 2.4. Lukoil oil products manufacture volumes in 2007
- 2.5. TNK-BP oil products manufacture volumes in 2007
- 2.6. Surgutneftegaz oil products manufacture volumes in 2007
- 2.7. Bashneftehimzavod companies group oil products manufacture volumes in 2007
- 2.8. Gazprom-neft oil products manufacture volumes in 2007
- 2.9. Slavneft oil products manufacture volumes in 2007
- 2.10. MTK-Moscow NPZ oil products manufacture volumes in 2007

- 2.11. TAIF-NK oil products manufacture volumes in 2007
- 2.12. Salavatnefteorgsintez oil products manufacture volumes in 2007
- 2.13. Gazprom oil products manufacture volumes in 2007
- 2.14. Russneft oil products manufacture volumes in 2007
- 2.15. Alliance Group oil products manufacture in 2007
- 2.16. Afipsky NPZ oil products manufacture volumes in 2007
- 2.17. Krasnodarekoneft oil products manufacture volumes in 2007
- 2.18. Mini-NPZ oil products manufacture volumes in 2007
- 3.1. Foreign brands automobiles sales in Russia during 2006-2007
- 3.2. The summary table of Russian motor oils market in 2005-2007
- 3.3. Combustive-lubricating materials output indicators on Rosneft factories
- 3.4. TN foreign economic activity codes characteristic of commodity group “Combustive-lubricating materials”
- 3.5. Foreign trade turnover volumes and trend of combustive-lubricating materials in Russia during 2005-2007
- 3.6. Combustive-lubricating materials deliveries volumes to Russia detailed on consignor countries in 2007
- 3.7. Combustive-lubricating materials import volume to Russia in 2007 detailed on consignee (TOP – 10, in kind)
- 4.1. Grain and basic agricultural crops sowing in all classes farming in 2007
- 4.2. Gross grain yields in Russia during 2003-2007 and forecast on 2008
- 4.3. Grain export and import in July – June of 2005-2007
- 4.4. Declared investment bioethanol manufacture places in Russia at the beginning of 2008
- 4.5. Comparative estimate indicators of investments required for oil refining factories (NPZ) and biofuel plants construction in Russia
- 4.6. Bioethanol output counting upon 1 ground area hectare of basic cereal crops
- 4.7. Spirit manufacture efficiency of various agricultural raw material
- 4.8. Comparative table of some physical and chemical diesel and biodiesel fuel properties
- 4.9. Set terms regarding transition to Euro-3, Euro-4 and Euro–5 standard diesel fuel
- 4.10. Declared investment biodiesel manufacture places in Russia at the beginning of 2008
- 4.11. The list of the oil-extraction plants equipped for raps processing
- 4.12. Comparative characteristics of fuel types
- 4.13. Initial raw material influence to biogas output in mesophilic fermentation regime
- 4.14. The biopower installations made in Russia, and their brief technical data
- 5.1. The Russian marine transport fleet detailed on ships of registration regions in 2007
- 5.2. Composition of the marine transport fleet controlled by Russia, and detailed on



purposes in 2007

5.3. Trends of the marine transport fleet controlled by Russia, and detailed on purposes, 1992 and 2007

5.4. Availability of the marine transport fleet controlled by Russia for the period of 2004-2007

5.5. Availability of Russian shipping companies marine carries operated under the Russian flag for the period of 2004-2007

5.6. Structure of marine fleet controlled by Russia in 2007

5.7. Average age of the fleet controlled by Russia detailed on purposes in 2007.

5.8. Average age of global and Russian fleet ships in 2007

5.9. Bunker fuel prices trend in Saint-Petersburg port against world in 2007

5.10. Export of oil and petroleum products from Russia in 2007

5.11. Initial petroleum refining and manufacture of principal types of oil products in Russia in 2007

5.12. The Russian leading companies engaged in storage and warehousing of oil and their processing products (TOP-10, detailed on annual turnover)

5.13. The Russian leading companies engaged in oil products transportation, (TOP-10, detailed on an annual turnover)

5.14. The Russian leading companies in the shipping sector (TOP-10, detailed on an annual turnover)

5.15. Wholesale trade leading enterprises (TOP-10, detailed on annual turnover)

5.16. Marine oil-terminals in Russia

5.17. Freight turnover of the Big Sea Port of Saint Petersburg and Primorsk for 12 months of 2007

5.18. Cargo processing volumes of oil-loading products in seaports of the Russian Northwest basin in 2003-2007

5.19. Delivery of oil products to Far North regions and such localities (as of January, 1 2008)

5.20. Volume of oil-loading products shipped by water transports to Far North in 2007

6.1. TN foreign economic activity codes characteristic of commodity group « Oil and petroleum products »

6.2. Volumes and export trend of PO Kirishinefteorgsintez in 2005-2007

6.3. Oil products derivatives volumes of OOO "Kinef" in 2007 detailed on consignees countries

6.4. Export volumes of OOO Kirishinefteorgsintez in 2007 detailed on consignees

6.5. Oil products manufacture structure of Ukhtinskiy NPZ in 2003-2007

7.1. Consumer prices trend of automobile gasoline and diesel fuel in March 2008

7.2. Average consumer prices of automobile gasoline and diesel fuel across Russia in March 2008



- 7.3. Average consumer prices of automobile gasoline and diesel fuel in NWFD in March 2008
- 7.4. Retail prices changes of automobile gasoline and diesel fuel in Saint Petersburg and Leningrad region in March 2008
- 7.5. Wholesale prices for principal fuel types detailed on the Russian factories as of April 16, 2008
- 7.6. The main oil products suppliers on the Saint Petersburg fuel market detailed on annual turnover
- 7.7. The Russian leading motor fuel retail trade companies detailed on annual turnover (TOP-20)
- 7.8. Leading fuel market operators of Saint Petersburg and Leningrad region
- 7.9. Share distribution of Saint Petersburg fuel market operators detailed on launching refueling stations in 2007
- 7.10. Quantity of refueling stations in Saint Petersburg as of the end of 2007
- 7.11. Quantity of refueling stations in Leningrad region as of the end of 2007
- 7.12. Land sites purchased as one lot by LUKOIL during the auction on March 10, 2006
- 7.13. Land sites purchased as one lot by TNK-BP during the auction on December 26, 2005

## **DIAGRAMS**

- 1.1. A share of Russia in the universal proved oil stocks as of the beginning 2007
- 1.2. Time history in distribution of the proved oil stocks in Russia during 2003-2007
- 1.3. The water basins, used for crude oil production, taken into account
- 1.4. Hydrocarbons Stocks
- 1.5. Crude oil production volumes trend in Russia during 2003-2007
- 1.6. Crude oil production volumes growth rates in Russia during 2003-2007
- 1.7. Crude oil production in Russia for the period of 2003-2007
- 1.8. Oil-producing companies in Russia as of the first quarter of 2008
- 1.9. Mid-annual prices for Urals brand oil in 2003-2007
- 1.10. Russian oil prices for Urals brand oil during the first half-year of 2008
- 2.1. Principal oil products manufacture in 2007
- 2.2. Initial petroleum refining in 2007 detailed on the main oil-and-gas companies
- 3.1. Total volumes of export combustive-lubricating materials deliveries from Russia in 2007 detailed in value terms
- 3.2. The largest motor oils manufacturers in Russia
- 3.3. The Russian motor oils market structure for automobile motor transport
- 3.4. Motor oils manufacture volumes of NK LUKOIL in 2004-2007
- 3.5. Packed motor oils manufacture volumes of NK LUKOIL in 2004-2007

- 3.6. Motor oils manufacture volumes of NK LUKOIL in 2007 detailed on factories
- 3.7. Combustive-lubricating materials import and export ratio in Russia during 2005-2007
- 3.8. Consignors countries geography of combustive-lubricating materials to Russia in 2007 in kind
- 3.9. Consignors countries geography of combustive-lubricating materials to Russia in 2007 (in value terms)
- 4.1. Cereal crops export trend from Russia in 2003-2007
- 4.2. The comparative data detailed on bioethanol manufacture expenses
- 4.3. Lorries market trend in Russia during 2003-2007
- 4.4. Raps manufacture trend for 2003 – 2007
- 4.5. The main methanol producers in Russia in 2007
- 5.1. Average prices for Russian Urals brand oil in 2003-2007
- 5.2. Prices for the Russian Urals brand oil in 2007-2008(5) on months
- 5.3. Prices trend for bunker fuel in Saint-Petersburg port in 2002-2007
- 5.4. Prices trend for bunker fuel in Saint-Petersburg port in 2007-2008(4) detailed on months
- 5.5. Volumes trend of Russian cargoes reloading through Russian seaports in 2004-2007
- 5.6. Leading enterprises shares of initial petroleum refining in Russia in 2007 (TOP-10)
- 6.1. Oil deliveries trend of KINEF in 2003-2007
- 6.2. Oil refining volumes trend of KINEF in 2003-2007
- 6.3. Consignees countries geography of oil products from KINEF in 2007 in kind
- 6.4. Consignees countries geography of oil products from KINEF in 2007 in value terms
- 6.5. Oil deliveries trend to Ukhtinskiy NPZ in 2003-2007
- 6.6. Initial oil refining trend of Ukhtinskiy NPZ in 2003-2007
- 6.7. Oil products manufacture trend of Ukhtinskiy NPZ in 2003-2007
- 6.8. Light oil products manufacture of Ukhtinskoy NPZ in 2003-2007
- 6.9. High-octane agsoline share of Ukhtinskiy NPZ in 2003-2007
- 7.1. Automobile fuel sales trend in Saint Petersburg and Leningrad region in 2006-2008
- 7.2. Vehicle park development trend of Saint Petersburg in 2004-2012
- 7.3. Fuel operators share distribution on Saint Petersburg market in 2007
- 7.4. Fuel operators share distribution on Leningrad region market in 2007
- 7.5. Share distribution of independent traders and vertically-integrated companies on Saint Petersburg fuel market in 2007
- 7.6. Share distribution of independent traders and vertically-integrated companies on of Leningrad region fuel market in 2007
- 7.7. Share distribution of vertically-integrated companies on Saint Petersburg fuel market in 2007

## 7.8. Share distribution of vertically-integrated companies on Leningrad region fuel market in 2007

## Figures

### FIGURES

1. Example of the brief supplemental information on a company
2. Analysis of financial figures of firm "X"
3. Analysis of foreign trade activities of a firm "X"

## I would like to order

Product name: Business processes in oil complex of Russia and Northwest region

Product link: <https://marketpublishers.com/r/BD5A45E5F0AEN.html>

Price: US\$ 5,088.75 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/BD5A45E5F0AEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970