

Russian North-West Federal District refueling station market: state and development trends

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Abstracts

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Main research objectives are:

1. State estimation and development prospects of North-West Federal District (NWFD) refueling station market in Russia from standpoint of investment appeal.
2. Expediency definition and possibilities of investors penetrate to the NWFD refueling station market.

The research period is 2003-2007. The general trends and development forecasts of the NWFD refueling station market are considered over near-term outlook.

Information sources:

1. Statistical data of the Russian Federal State Statistic Service, results of researches of Scientific Research Institute of territorial evolution and transport infrastructure, Saint Petersburg Oil Club, legislative and legal texts of Russia, Saint-Petersburg and Leningrad region, recommendations of Federal Antimonopoly Service, data of Federal Customs Service of Russia.
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:

The experts select Saint Petersburg and Leningrad region in North-West area due to infrastructure development and fuel trade turnover. So, according to experts' estimations in 2007 the Saint Petersburg fuel market capacity was about 5,475

thousand tons, and Leningrad region – 3,285 million tons.

Today the refueling station market of Saint Petersburg and Leningrad region grows rapidly. During several years it will be interesting in development of refueling station along the building western high-speed diameter and encircling highway around Petersburg and in Leningrad region. In the future Leningrad region will have large potential for developing of refueling station network.

The specialists note that for the last decade existing territorial principle of oil products deliveries market development has resulted actually to origination of monopolies in most country regions and partition of the market by a territorial principle. At the same time according to expert's opinion Moscow and Saint Petersburg markets are completely demonopolized in comparison with other regions of Russia.

Federal Antimonopoly Service (FAS) of the Russian Federation is going to limit growth of fuel monopolist's influence in regions. So, FAS suggests to make an amendment to the Land laws which will prohibit the allocation of land sites for refueling station to those companies whose share exceeds 50% in the local retail oil products market.

Experts consider that in Petersburg the situation with allocation of land sites is relatively transparent as the Property Fund of Saint Petersburg offering land sites for advertised bidding requires to show general location and cadastral plans, specify address and plottage, asking lot price, auction steps, deposit size, requests reception terms and other things.

In Leningrad region the land sites for construction can be received either through tenders or on the investment contracts basis. The Property Fund of Leningrad region, or metropolitan region local government, or specialized organization acting on the contract basis with local government can act as a tender's organizer.

Market participants consider that the large enterprises such as LUKOIL, TNK-BP, SIBNEFT, ROSNEFT, and etc. can permit themselves to buy up land sites on the city fuel market aside from demands for refueling stations quantity. Moreover, independent company's penetration to the Petersburg refueling stations market is possible but due to competent marketing policy using as for example Faeton did it on Moscow refueling station market.

The brief information on the leading companies of the NWFD refueling station market in Russia is presented in the report as well. For more information on participants of the

NWFD refueling station market in Russia see created by «CredInform – North-West» Companies Directories in which companies are grouped using main code of Russian National Classifier of Economic Activities (OKVED).

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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