



**Intesco
Research
Group**

RAPESEED AND RAPESEED OIL. RUSSIAN MARKET OF RAPESEED AND RAPESEED OIL



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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

MARKET OF RAPESEED AND RAPESEED OIL

Goal of research:

ESTIMATION OF MARKET CONDITIONS AND FORECAST OF ITS
DEVELOPMENT FOR 2011-2013

Region of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

VOLUME OF RUSSIAN MARKET OF RAPESEED AND RAPESEED OIL
PRODUCTION OF RAPESEED OIL IN RUSSIA
WORLD MARKET OF RAPESEED AND RAPESEED OIL
ANALYSIS OF IMPORT OF RAPESEED AND RAPESEED OIL
ANALYSIS OF EXPORT OF RAPESEED AND RAPESEED OIL
THE LARGEST PRODUCERS OF RAPESEED AND RAPESEED OIL
FORECAST OF DEVELOPMENT OF THE MARKET FOR 2011-2013

Market is segmented by:

REGIONS OF RAPESEED PRODUCTION
REGIONS OF RAPESEED OIL PRODUCTION
TYPES OF RAPESEED
TYPES OF RAPESEED OIL
THE LARGEST PRODUCERS
THE SHARE OF IMPORT/DOMESTIC PRODUCTION

The largest players of the market with profiles:

"LIBOIL" OJSC

"ASTON" OJSC

SUBSIDIARY "LABINSKY MEZ" "MEZ SOUTH OF RUSSIA" OJSC

"KAZANSKIY MEZ" OJSC

"MEZ SOUTH OF RUSSIA" OJSC

There is information about the main enterprises, such as: volumes of production, financial statement, statement of income and expenditures, cashflow statement, subsidiary enterprises and other information.

Information sources used:

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Custom Service

Federal Tax Service

Appraisal of Experts of the Branch

Reports on retail sales

Data of the main players of the branch

Printed and electronic publications of the branch

The research contains 39 Schedules, 34 diagrams and 53 tables.

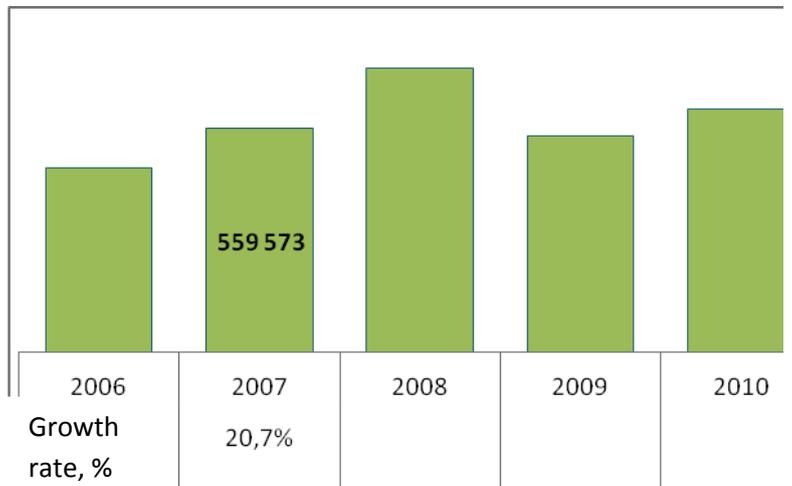
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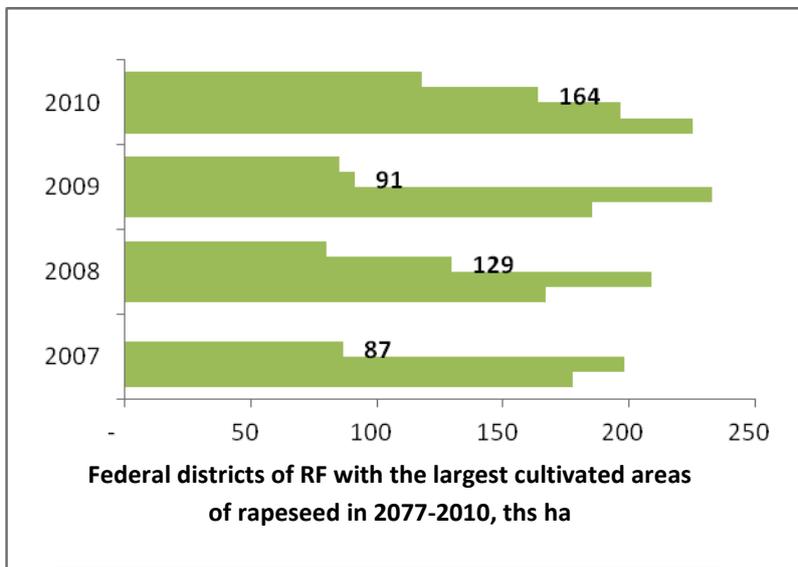
VOLUME OF RUSSIAN MARKET OF RAPE

Volume of Russian market of rapeseed in physical terms in 2006-2010 increased by *** ths tons (or by ***%). The annual rate of growth of market volume amounted to ***%.

Share of volume of import on Russian rapeseed market in 2006-2010 was rather insignificant as compared to the volume of yield. The share of export was slightly larger and ranged from *** to ***%.



Dynamics of the Russian rape seeds market volume in 2006-2010, tons

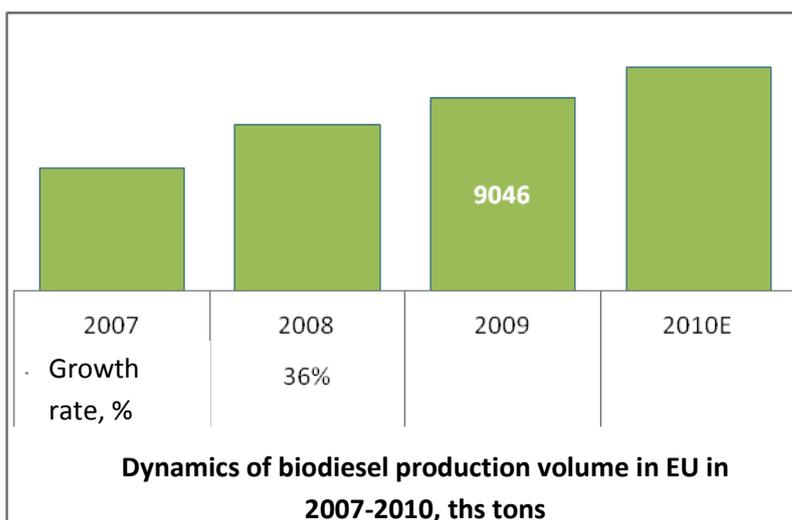


Federal districts of RF with the largest cultivated areas of rapeseed in 2007-2010, ths ha

The federal district with the largest cultivated areas in 2010 was *** FD (*** ths ha.), which was followed by ***FD (*** ths ha) and *** FD (164 ths ha).

CHAPTER 5

WORLD MARKET OF RAPESEED OIL



Volume of rapeseed oil trade among countries of the world increased rapidly during last fifty years. By the end of 1990s and beginning of 2000s the food and industrial market of rapeseed oil was over saturated, which led to a sharp decrease of rates of growth of the market, in average by 2% a year in

1990s. In 2000s after the development of biodiesel production the volume of trade began to grow fast and in 2001-2008 an average rate of growth of trade volume amounted to ***%.

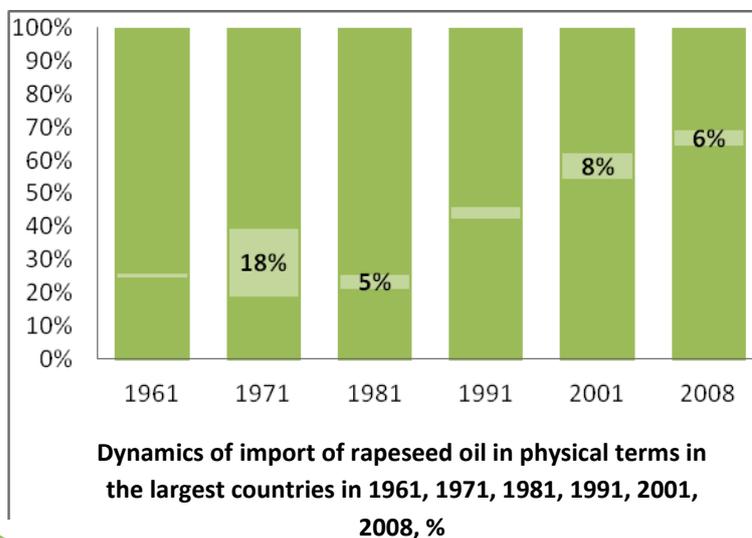
The annual rate of growth in 1961-2008 amounted to ***%, in 1990-2008 – ***%.

In 1991-2008 the largest exporter of rapeseed oil in the world was USA, its share was ***% of all the export and this share was gradually increasing. The second country by the export volume in this period was Germany, which had ***% of export.

It should be marked that the share of the largest ten exporters for 1961-2008 increased from ***% to ***%.

...

Rapeseed oil is the main source of raw material for



biodiesel production in countries of the EU. The growth of biodiesel production led to the significant increase of the demand for rapeseed oil during 2001-2008.

Europe is the main consumer of rapeseed oil for production of biodiesel (in USA for these purposes they use soy, in South Eastern Asia – palm trees).

Volume of production of biodiesel in the EU for 2007-2010 increased by ***. The average annual rate of growth of production was ***%.

Table. Dynamics of production volume of biodiesel in the largest countries of EU in 2007-2010, ths tons

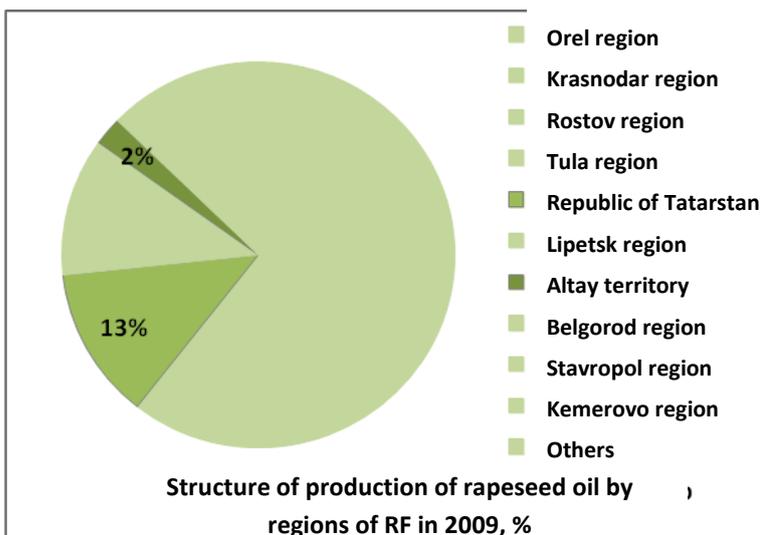
	2007	2008	2009	2010E
EU				
Germany	2662			
France				
Spain				
Italy				
Belgium				
Poland				
Netherland				
Austria	123			
Portugal				
Finland				
Others	1389			

CHAPTER 8

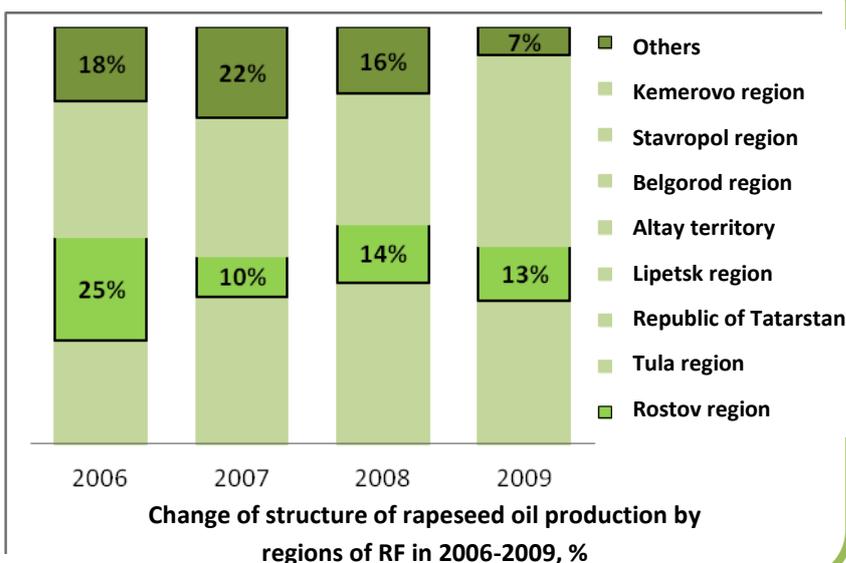
PRODUCTION OF RAPESEED OIL IN RUSSIA

In 2009 the largest shares of production were in Orel region (***%), Krasnodar territory (***%) and Rostov region (***%). These three regions produced ***% of all Russian rapeseed oil.

Shares of *** region and Krasnodar territory were relatively stable during 2006-2009 although showed the trend to gradual and unstable increase. Shares of other regions changed significantly: there was a



sharp increase of shares of: Tatarstan (by ***) and Lipetsk region (by ***) in 2008-2009, the share of Tula region significantly decreased during 2006-2008, but it increased again in 2009.



The shares of regions not included into ten largest regions were also gradually decreasing.

CHAPTER 10

ANALYSIS OF RUSSIAN IMPORT
OF RAPESEED

In monthly dynamics of rapeseed oil import there are no patterns of behavior – either the volume of import was too small to reveal any or purchases of oil were too high, but made at a time, which did not allow to show any periodic fluctuations.

In the first quarter of 2011 the volume of import amounted to 192 tons, that was two times more than in the same period of the previous year (99,3 tons).

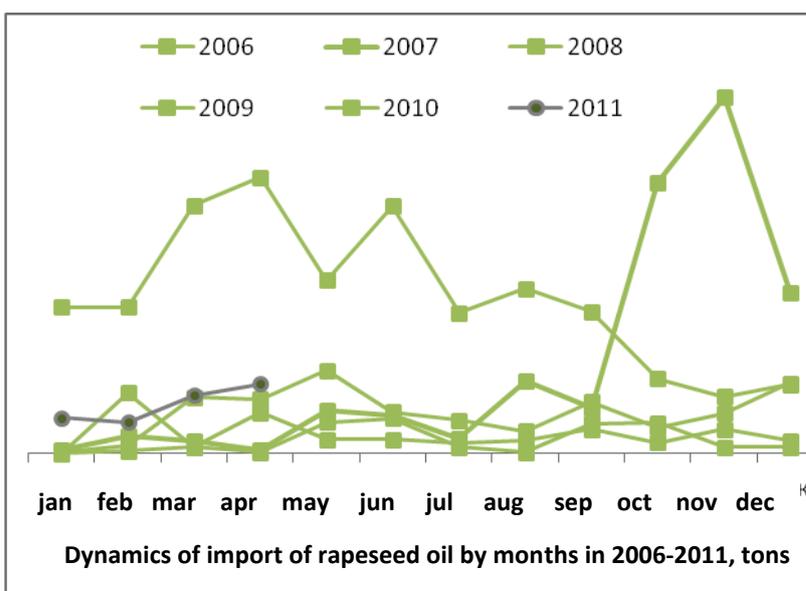


Table 17. Dynamics of rapeseed oil import in RF by months in 2006-2011, tons

	2006	2007	2008	2009	2010	2011
jan	0,8					
feb	3,9					
mar	9,7					
apr				62,5		
may				21,7		
jun				21,6		
jul						
aug						
sep						
oct			115,2			
nov			87,4			
dec			106,4			

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ABOUT INTESCO RESEARCH GROUP

ABOUT INTESCO RESEARCH GROUP COMPANY

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Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

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IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**