



**Intesco
Research
Group**

STARCH AND RUSSIAN MARKET OF STARCH



MOSCOW 2012

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ABOUT INTESCO RESEARCH GROUP

RESEARCH METHODOLOGY

Subject of research:

STARCH MARKET

Goal of research:

ASSESSMENT OF STARCH MARKET STATE & FORECAST OF ITS
DEVELOPMENT FOR 2012-2015

Region of research:

RUSSIA AND REGIONS OF RF

Main blocks of research:

RUSSIAN MARKET OF STARCH

STARCH PRODUCTION

ANALYSIS OF STARCH EXPORT

ANALYSIS OF STARCH IMPORT

PRODUCERS' PRICES FOR STARCH

STATE REGULATION ON RUSSIAN MARKET

FACTORS IMPACTING ON RUSSIAN MARKET

FORECAST OF RUSSIAN STARCH MARKET DEVELOPMENT FOR 2012-2015

Information sources used:

Federal State Statistics Service

Ministry of Agriculture of RF

Federal Customs Service

Federal Tax Service

Field expert evaluations

Retail sales reports

Materials of the field's main players

Field print and electronic publications

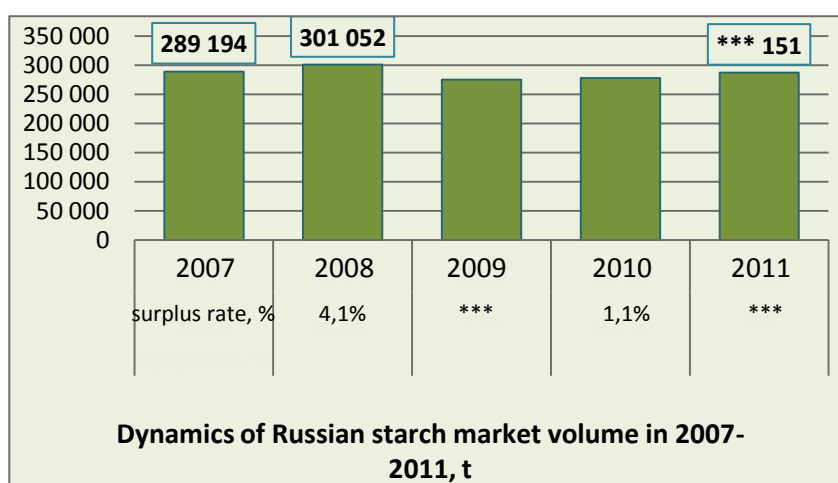
The research contains 77 schedules, 43 diagrams, 87 tables and 1 scheme.

EXTRACTS FROM RESEARCH

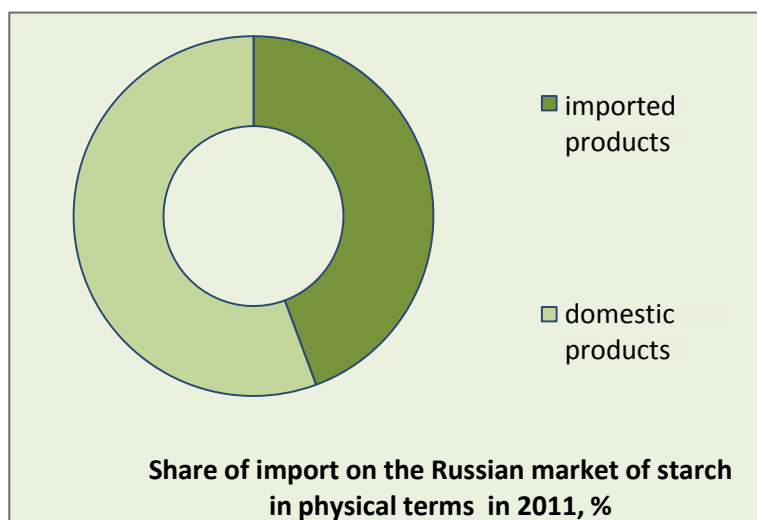
CHAPTER 3

VOLUME OF RUSSIAN STARCH MARKET

In 2008 the volume of Russian starch market was 301 ths. t. – this is the highest value through the period of 2007-2011. There was a decrease of that value in 2009 by *** ths. t. – the slump is caused by decline in production volume of pulp-and-paper sector (major consuming sector). As of 2010 the market volume started gradually increasing and, as per the results of 2011, it amounted to *** ths. t.



A downward trend of foreign products availability on the Russian market has been noticed since 2007. By 2011 the share of imported starch fell down by 13% and accounted for ***% in physical terms.



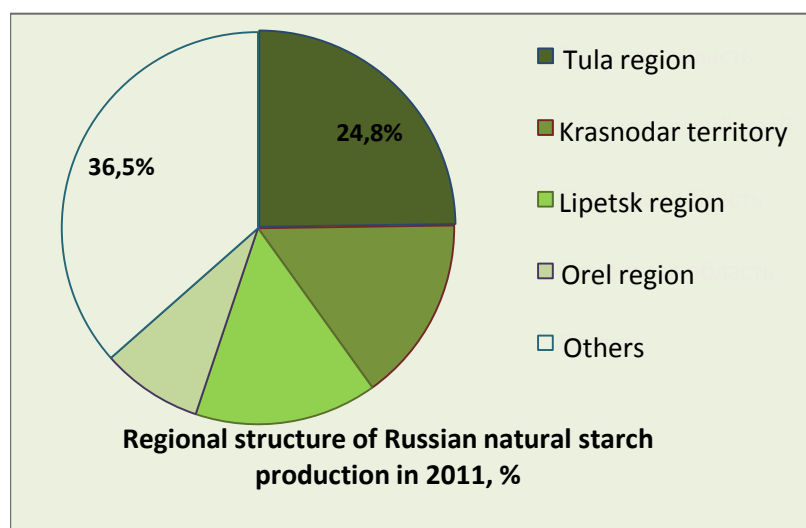
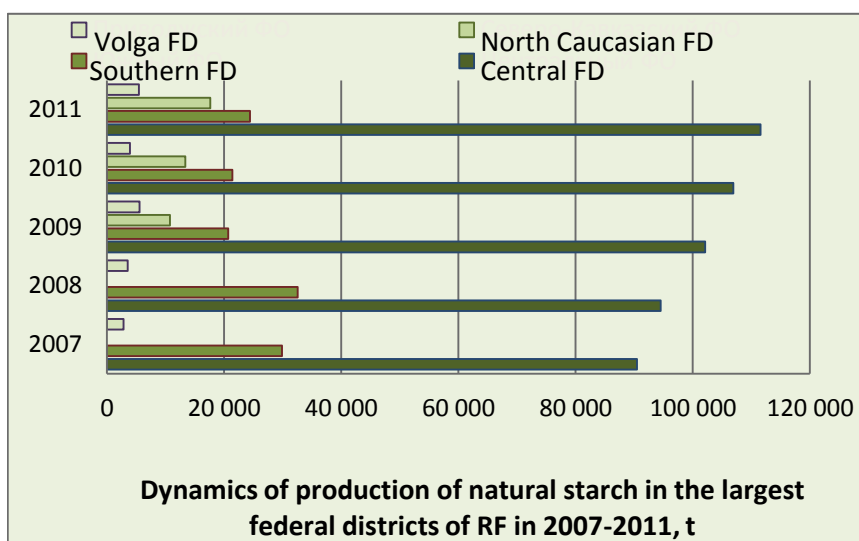
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Throughout the observed period from 2007 to 2011, the enterprises of Volga FD showed the most positive dynamics – the output of products was increased by 2 times. The enterprises of Central FD are stably growing their volume of output products. Through the period from 2007 till 2011 the growth was 23%. The producers of North Caucasian FD increased also production volume by ***%.

Industrial output of natural starch was significantly reduced in Southern FD (-**%).

In 2011, ¼ part of domestic starch was made in Tula region. The share of Krasnodar territory amounted to **%,



Lipetsk region - **, 1%. More than half of domestic production is focused in those 3 regions.

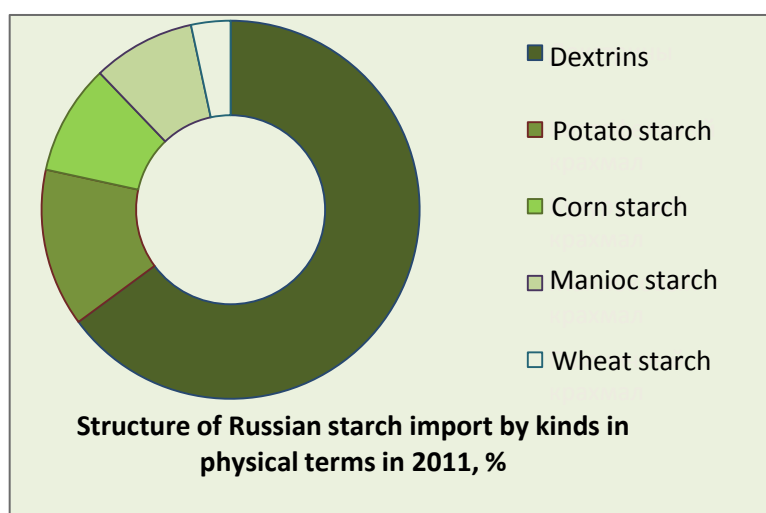
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Russian import of starch amounted to *** ths. t. in 2011. With the increase of import volumes of starch to the territory of Russia in 2011, the volume of imported starch reduced rapidly as of 2009. According to the results of 2011, there were imported by $\frac{1}{4}$ less starch to the territory of Russia compared to 2008 (or by *** ths. t. in physical terms).



Dextrin is a main category of Russian starch import. It occupies the share of almost 2/3 of



all volume of imported starches in the general structure of import for this type of product. Potato and corn starches have much less shares in this structure (**% and ***% respectively). Wheat starch is imported the least (**%).

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ABOUT INTESCO RESEARCH GROUP

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