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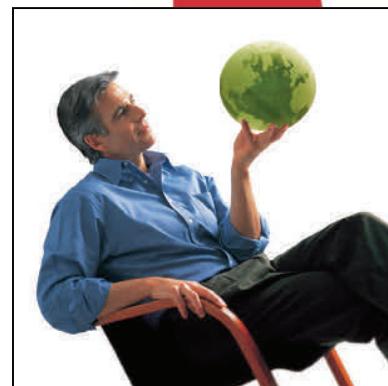
Agriculture et
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**International
Markets
Bureau**

MARKET INDICATOR REPORT | OCTOBER 2012

Consumer Trends Cooking Oils in Russia





► **MARKET SNAPSHOT**

- ▶ The Russian Federation (Russia) has the largest territory in Eurasia, bordering 14 countries. Russia's population was estimated to be 142.9 million in 2011 (Euromonitor, primary data from national statistics and United Nations, 2012). Russia has experienced a continuous population decrease for many years; however, the decline has been more moderate in recent years than in the early 2000's. The major factors contributing to this decrease are increasing emigration and a relatively low fertility rate. The population is expected to maintain a slow contraction through the 2012 to 2016 forecast period (Euromonitor, 2012).
- ▶ Russia has experienced fast economic growth supported by abundant natural resources and a shift to a market economy during the last decade. The country's total gross domestic product (GDP) reached US\$1.48 trillion in 2010, with a current account surplus of US\$70.3 billion (World Bank, 2012).
- ▶ Displaying the strength of the country's economy, Russia's total trade balance was the third-largest in the world over the last five years. Russia is working to become a permanent member of the World Trade Organization (WTO) as an observer country, with its accession packages approved by the WTO in December 2011.
- ▶ Russia's total agri-food and seafood imports from the world accounted for approximately 15% of the country's total imports during the 2006 to 2011 period. In 2011, Russia's total imports of agri-food and seafood exceeded US\$39.6 billion, and the top three import partners were Brazil, Germany and Ukraine. In the same year, Canada was Russia's 18th-largest import partner for agri-food and seafood products.
- ▶ Due largely to the country's economic growth, consumer expenditure increased significantly since 2006. Russia's total consumer expenditure on foods and beverages expanded at a compound annual growth rate (CAGR) of 17.1% during the 2006-2011 period. Consumer expenditure on oils and fats totaled US\$11 billion in 2011, with a CAGR of 20.9% from 2006 to 2011.
- ▶ Russia's oils and fats market showed robust growth during the 2006 to 2011 period. The vegetable and seed oil sub-category showed the fastest growth by value, but only a marginal increase by volume. The shift in consumer preference towards more high quality and healthy oils likely contributed to this value sales expansion.
- ▶ Russian cuisines have evolved and diversified throughout the country's long history, yet there are many common dishes such as Shchi (cabbage soup) and Pelmeni (minced meat dumpling). Oils and fats are important ingredients used in the preparation of these dishes.

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► TRADE



- ▶ Russia is a net importer of oil and fat products, with imports valued at US\$1.48 billion and exports of US\$1.07 billion in 2011. Russia's top import oils were palm oil products, and major import partners were Indonesia and Malaysia, who are the leading producers of palm oil products.
- ▶ Russia is one of the major rapeseed and rapeseed oil producers in the world; however, the country's domestic consumption of these products is relatively low compared to other types of edible oil types such as sunflower seed. Russia exported US\$179 million of rapeseed oils to the world in 2011.
- ▶ Russia's total imports of rapeseed oils accounted for approximately 0.15% of total oils and fats and 0.11% by volume during the 2006 to 2011 period. In 2011, imports of rapeseed oils were valued at US\$2.4 million, and registered a volume of 1.3 million kilograms. The country's major import partners for rapeseed oil products were Germany, with an import share of 63%, Finland (19%) and the Netherlands (6%) in 2011.
- ▶ During the 2006 to 2011 period, Canada's exports of rapeseed/canola oil to Russia were negligible. Canada exported US\$1,078 of rapeseed, colza and mustard oil to Russia in 2007, and US\$32,966 of low erucic acid rapeseed/colza oil and its fractions in 2010 (Global Trade Atlas, 2012).

Russia's Trade of Rapeseed Oils by Value (Historic) in US\$

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR*
Imports from the world	256,884	2,354,230	4,771,452	472,340	1,055,185	2,399,225	56.3%
Exports to the world	32,684,473	22,744,645	82,150,619	71,712,356	86,599,308	178,977,665	40.5%

Russia's Trade of Rapeseed Oils by Volume (Historic) in Kilograms

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR*
Imports from the world	272,113	1,593,479	2,897,902	353,271	709,929	1,345,040	37.7%
Exports to the world	50,305,067	28,111,198	70,406,869	96,510,589	94,932,767	146,427,038	23.8%

Source for both: Global Trade Atlas, 2012. *CAGR: compound annual growth rate.

► RETAIL SALES

Retail Sales Overview

- ▶ The total value sales of Russia's oils and fats market reached US\$6.2 billion in 2011. This market expanded at a CAGR of 14.2% between 2006 and 2011. However, total volume sales contracted at a CAGR of 0.3% over the same period.
- ▶ The unit price per kilogram for oils and fats at the retail level also increased significantly, with a CAGR of 14.5% during the 2006 to 2011 period. The main cause was the increasing price of butter, as well as vegetable and seed oils. The unit price of butter increased at a CAGR of 15%, while vegetable and seed oils grew at a CAGR of 21.5% during this period. However, olive oil recorded the highest unit price throughout this period, at US\$15.60 per kilogram in 2011.
- ▶ The vegetable and seed oil category registered total value sales of US\$3 billion in 2011, with a CAGR of 23.6% over the 2006 to 2011 period. The olive oil category also saw fast sales growth with a CAGR of 20.5% in value terms, and 12.7% in volume. However, olive oil remained the smallest segment in the Russian oils and fats market.

► RETAIL SALES (continued)



- ▶ Sunflower seed oil was the dominant type of vegetable and seed oil during the 2006 to 2011 period. In 2011, sunflower oil represented approximately 86% of the total sales value of vegetable and seed oils, followed by rapeseed oil with a 10.5% share.

Russia's Oils and Fats Market Size by Retail Value Sales (Historic) in US\$ Millions

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR*
Total oils and fats	3,198.7	4,147.3	5,064.3	5,247.3	5,622.6	6,201.6	14.2%
Butter	1,454.4	1,719.0	1,885.8	1,904.9	1,919.9	2,161.4	8.2%
Cooking fats	26.3	25.5	24.6	22.7	21.9	21.9	-3.6%
Margarine	139.4	166.2	141.4	133.3	132.0	135.0	-0.6%
Olive oil	107.1	224.1	226.4	225.7	249.6	272.3	20.5%
Spreadable oils and fats	416.1	486.0	500.7	501.5	539.9	571.1	6.5%
Vegetable and seed oil	1,055.3	1,526.6	2,285.4	2,459.2	2,759.2	3,040.0	23.6%

Russia's Oils and Fats Market Size by Retail Volume Sales (Historic) in Thousands of Tonnes

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR*
Total oils and fats	1,540.4	1,634.2	1,508.8	1,525.2	1,499.6	1,516.7	-0.3%
Butter	315.5	304.9	283.6	252.4	229.2	233.3	-5.9%
Cooking fats	23.0	21.6	20.3	18.4	17.4	16.9	-6.1%
Margarine	68.4	65.4	58.5	55.4	54.6	55.0	-4.3%
Olive oil	9.6	16.3	16.1	15.4	16.6	17.4	12.7%
Spreadable oils and fats	151.1	154.1	133.4	126.8	132.4	136.4	-2.0%
Vegetable and seed oil	972.8	1,072.0	997.0	1,056.8	1,049.4	1,057.8	1.7%

Source for both: Euromonitor International, Oils and Fats in Russia, 2012.

*CAGR: compound annual growth rate

Retail Sales Forecasts

- ▶ Value growth for oils and fats in Russia over the 2011 to 2016 period is expected to slow down compared to the previous five years, at a CAGR of 7% to reach sales of US\$8.7 billion by 2016. According to Euromonitor (2012), value sales expansion will likely be driven by price increases and shifts in consumption to higher quality and more expensive products during this period. In addition, as a result of the maturation of oils and fats consumption and increasing health concerns, volume sales growth will remain marginal or negative for some sub-categories, such as cooking fats.
- ▶ The vegetable and seed oil sub-category will experience continuous value sales growth over the forecast period, which will be driven mainly by higher unit prices, rather than volume consumption increases. The olive oils sub-category traditionally accounted for a small portion of Russia's oils and fats market, but showed a double digit increase over the 2006 to 2011 period, both in value and volume terms. The olive oil sub-category is expected to continue experiencing fast growth over the forecast period, at a CAGR of 14% by value and 8% by volume from 2011 to 2016.



► RETAIL SALES (continued)

Retail Sales Forecasts (continued)

Russia's Oils and Fats Market Size by Retail Value Sales (Historic/**Forecast**) in US\$ Millions

Category	2011	2012	2013	2014	2015	2016	2011-16 CAGR*
Total oils and fats	6,201.6	6,776.9	7,336.2	7,817.2	8,251.1	8,703.4	7.0%
Butter	2,161.4	2,377.8	2,575.9	2,737.7	2,881.7	3,038.0	7.0%
Cooking fats	21.9	22.1	22.3	22.5	22.8	23.3	1.2%
Margarine	135.0	139.2	144.2	150.0	155.9	163.4	3.9%
Olive oil	272.3	309.1	356.7	407.9	463.5	525.2	14.0%
Spreadable oils and fats	571.1	592.5	613.4	636.9	661.7	688.5	3.8%
Vegetable and seed oil	3,040.0	3,336.1	3,623.8	3,862.2	4,065.6	4,264.9	7.0%

Russia's Oils and Fats Market Size by Retail Volume Sales (Historic/**Forecast**) in Thousands of Tonnes

Category	2011	2012	2013	2014	2015	2016	2011-16 CAGR*
Total oils and fats	1,516.7	1,534.3	1,552.6	1,572.0	1,586.4	1,599.6	1.1%
Butter	233.3	236.8	238.5	237.3	234.9	233.4	0.0%
Cooking ats	16.9	16.6	16.4	16.3	16.2	16.2	-0.8%
Margarine	55.0	56.1	57.6	59.6	61.4	63.1	2.8%
Olive oil	17.4	18.7	20.2	21.8	23.6	25.6	8.0%
Spreadable oils and fats	136.4	138.3	140.4	143.1	145.9	148.3	1.7%
Vegetable and seed oil	1,057.8	1,067.8	1,079.6	1,093.9	1,104.4	1,113.0	1.0%

Source for both: Euromonitor International, Oils and Fats in Russia, 2012.

*CAGR: compound annual growth rate

Distribution

- The oils and fats products sold at independent small grocers accounted for more than 50% of total retail sales through store-based outlets. Supermarkets represented more than 20% of total retail sales for the first time in 2007 and continuously increased during the 2008 to 2011 period, accounting for 29% of total retail sales in 2011. As supermarkets gained more share in distribution, other types of retailers, excluding independent small grocers, experienced a significant decrease in distribution share. In addition, non-store based retailing, such as internet sales, started gaining share at a very marginal level of 0.3% in 2007, reaching 0.7% of oils and fats distribution in 2011.



Cooking oils displayed at a supermarket in Russia (X5 Retail Group)

Source: Planet Retail, 2012

► NEW PRODUCT LAUNCHES



- ▶ According to the Mintel Global New Products Database, there were 68 new cooking oil product launches in Russia between January 2007 and December 2011. This includes one rapeseed oil product. In 2010, new product launches peaked with 35 new products, representing 51.5% of the total launches during the search period, followed by 19 new products in 2011.

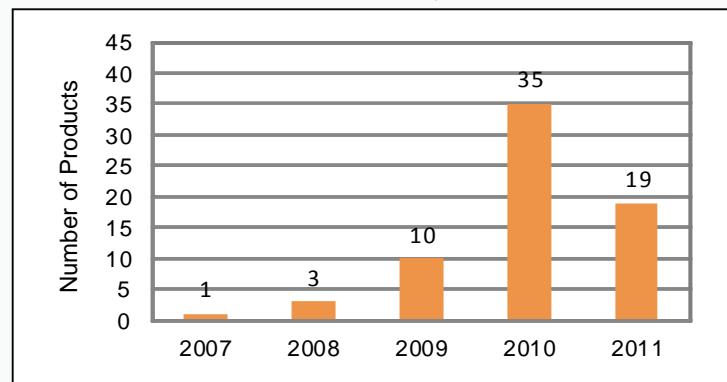
Launch Types

- ▶ Of the 68 launches, 59 products were new products, accounting for 87%. Six products were launched as a new variety/range extension and three products were launched with new packaging.

Major Companies and Brands

- ▶ During the 2007 to 2011 period, most of the major oils and fats companies launched new products across various types of oils. The leading company in the market, Yug Rusi, published the highest number of new products with six releases under the company's four major brands.
- ▶ As a single brand, Zolotaya Semechka (Yug Rusi) launched the highest number of new products with three varieties in total. The Sloboda (Efko), Ogorodnikov (PK Sarepta PomidorProm) and Gloden Kings of Ukraine (Variant) brands released two new products each.

New Cooking Oil Product Launches in Russia from 2007-2011 by Year



Source: Mintel, 2012

New Cooking Oil Product Launches in Russia from 2007 to 2011 by Top Companies and Brands

Company	Brand	Number of Products
Yug Rusi	Zolotaya Semechka	3
	Sto Retseptov	1
	Yug Rusi	1
	Avedov"	1
Efko	Sloboda	2
	Altero Golden	1
	Altero Beauty	1
Bunge	Oleyna + Olive	1
	Maslenitsa	1
	Ideal	1
Aston	Volshebnyy Kray	1
	Svetlitsa	1
	Zateya	1
Nevinnomysskiy Masloekstraktionskiy Zavod	Povar Pyotr Povar Pavel	1
	Rus'	1
PK Sarepta PomidorProm	Ogorodnikov	2
Pietro Coricelli	Pietro Coricelli	1
	Leonero	1
Kompaniya Blago	Zlatoley	1
	Blago	1
Interfood	Iberica	1
	Monini	1
Variant	Golden Kings of Ukraine	2

Source: Mintel, 2012



► NEW PRODUCT LAUNCHES (continued)

Claims

- ▶ The most common claim amongst the 68 new launches was low/no/reduced cholesterol, with 15 products.
- ▶ The next most popular claim with eight products, was free from genetically modified organisms (GMO-free). Economy, premium and kosher claims were also common, each with seven new products.
- ▶ The remaining claims were related to fortified nutrition and health benefit functionality.

Types of Oil and Flavours

- ▶ When classified by the main ingredient, olive oil accounted for 27 of the new launches. Within olive oil, there were 12 products identified as extra-virgin olive oil.
- ▶ Sunflower seed oil also had 27 new products. Within sunflower seed oil, there were 19 refined oil products, including 11 refined deodorized oils. Three products were classified as unrefined sunflower seed oils.
- ▶ The corn oil market is quite small and considered as a niche in Russia. However, during the search period, there were five new corn oil products launched in the market, all as deodorized corn oil products.
- ▶ The dominant flavour across all of the new launches was unflavored/plain. There were two flavoured olive oil products, one with basil and the other with rosemary. The term 'deodorized' was often used in the product names or descriptions for sunflower and corn oil products.

Packaging

- ▶ The most commonly used packaging was a 1 litre plastic Polyethylene terephthalate (PET) bottle (18 products), followed by a 500 ml coloured glass bottle (five products) and 500 ml plain glass (five products). Other types of packaging included metal steel and multilayer board.



Source: Mintel, 2012

New Cooking Oil Product Launches in Russia from 2007 to 2011 by Major Claim

Claim	Number of Products
Low/no/reduced cholesterol	15
GMO-free	8
Economy	7
Premium	7
Kosher	7
All natural product	6
No additives/preservatives	6
Other (functional)	5
Immune system (functional)	3
Cardiovascular (functional)	3

Source: Mintel, 2012

New Cooking Oil Product Launches in Russia from 2007 to 2011 by Major Oil Ingredient

Oil Type	Number of Products
Olive oil	27
Sunflower seed oil	27
Corn oil	5
Mustard seed oil	2
Rapeseed oil	1
Camelina seed oil	1
Sesame seed oil	1
Linseed oil	1
Macadamia nut oil	1
Hazelnut oil	1
Grapeseed oil	1

Source: Mintel, 2012

► NEW PRODUCT EXAMPLES



The following are some examples of the new cooking oil products launched in Russia between January 2007 and December 2011, from the Mintel Global New Products Database (2012).



Rapeseed Oil

Company: ZAO Venevskiy Maslozavod
Brand: Rossiyskie Semena
Category: Sauces and seasonings
Sub-Category: Oils
Date Published: August 2009
Launch Type: New product

Price (US\$): 1.58
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 890 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Rapeseed oil

Product Description: Rossiyskie Semena Rape Oil is said to be directly squeezed and is described as refined and deodorized.

Refined Deodorized Maize Oil

Company: Kompaniya Blago
Brand: Blago
Category: Sauces and Seasonings
Sub-Category: Oils
Date Published: December 2011
Launch Type: New product

Price (US\$): 2.87
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 1 litre
Storage: Shelf stable
Private Label: Branded
Ingredients: Refined deodorized P-grade corn oil

Product Description: Blago Rafinirovannoe Dezodorirovannoe Kukuruznoe Maslo (Refined Deodorized Maize Oil) is now available.



Olive Oil

Company: Pietro Coricelli
Brand: Pietro Coricelli
Category: Sauces and seasonings
Sub-Category: Oils
Date Published: December 2011
Launch Type: New product

Price (US\$): 7.55
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 1 litre
Storage: Shelf stable
Private Label: Branded
Ingredients: Refined olive oil from sanza de olive pomace, olive oil (refined)

Product Description: Pietro Coricelli Olivkovoye Maslo (Olive Oil) is now available at retail. This product is certified kosher.

Source for all: Mintel, 2012

► NEW PRODUCT EXAMPLES (continued)



Sunflower Oil

Company: Efko
Brand: Altero Golden
Category: Sauces and Seasonings
Sub-Category: Oils
Date Published: October 2011
Launch Type: New variety/range extension

Price (US\$): 2.08
Package Type: Bottle
Package Material: Plastic unspecified
Pack Size: 810 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Sunflower seed oil (deodorized, refined), olive oil (refined)

Product Description: Altero Golden Sunflower Oil is made with added olive oil and contains vitamins A, E and F. It is free from cholesterol and is said to be a premium quality product that is perfect with salads or for frying.

Camellia Extra Virgin Salad Oil

Company: PK Sarepta PomidorProm
Brand: Ogorodnikov
Category: Sauces and seasonings
Sub-Category: Oils
Date Published: November 2010
Launch Type: New variety/range extension

Price (US\$): 2.07
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 690 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Not indicated

Product Description: Ogorodnikov Camelina Extra Virgin Salatnoye Maslo (Camelina Extra Virgin Salad Oil) is made from camelina sativa seeds.



Mustard Oil

Company: Rodos
Brand: Gorlinka
Category: Sauces and Seasonings
Sub-Category: Oils
Date Published: July 2010
Launch Type: New product

Price (US\$): 2.58
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 750 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Mustard seed oil

Product Description: Gorlinka Gorchichnoye Maslo (Mustard Oil) is ideal for salads, sauces, frying and baking. This natural product is made from cold pressed mustard seeds and is rich in phospholipids, pro-vitamins and vitamins A, F and E.

Source for all: Mintel, 2012

► COMPANY SHARES



- ▶ Russia's oils and fats market is highly competitive with many local and international companies. The major local companies, with various product ranges, maintained a leading position during the 2006 to 2010 period with marginal fluctuations. However, some of the oils and fats companies focusing on economy products have experienced sales decreases, as consumers purchase higher quality products or reduce vegetable oil consumption.
- ▶ Yug Rusi APG is the leading oils and fats company in Russia with a strong presence in the vegetable oil market, specifically. The company recorded an average value share of 12.8% during the 2006 to 2010 period. In 2010, Yug Rusi APG's total sales reached US\$713 million, accounting for a 12.7% share of the oils and fats market.
- ▶ Wimm-Bill-Dann Produkty Pitania OAO, the leading company in the Russian butter market, gained greater market share over the 2006 to 2010 period, while maintaining the second position. The company registered a 14% value share in the butter market, and a 7.6% value share in Russia's total oils and fats market. The other major oils and fats companies, with market shares of more than 4% since 2006, were Bunge Ltd. and W J Group.

Russia's Oils and Fats Company Shares by Retail Sales Value (Historic) — % Breakdown

Company (GBO*)	2006	2007	2008	2009	2010
Yug Rusi APG	12.5	12.2	14.4	12.3	12.7
Wimm-Bill-Dann Produkty Pitania OAO	4.8	5.6	6.2	7.2	7.6
Bunge Ltd	4.6	4.4	4.4	4.5	4.6
W J Group	4.4	4.6	4.9	4.6	4.6
Valio Oy	4.4	4.2	3.5	4.1	4.2
Efko ZAO	2.9	3.3	3.5	3.5	3.7
Demiurg ZAO	2.5	2.8	3.1	3.8	3.3
Heinz Co, HJ	4.3	3.9	3.3	3.2	3.0
Solnechnye Produkty Holding ZAO	2.7	2.8	2.7	2.6	2.8
Fonterra Co-operative Group	2.6	3.1	2.2	2.5	2.4
Vologodsky Molkombinat OAO	1.8	2.0	1.9	2.4	2.2
Unilever Group	3.4	2.9	2.4	2.3	2.2
Ostankinsky Molkombinat OAO	1.6	1.9	2.0	2.2	2.0
Aston Group	0.7	1.8	1.8	1.9	1.9
Unimilk Kompania OAO	0.8	0.9	1.2	1.5	1.7
Russkiye Masla GK	1.6	1.9	1.9	1.6	1.6
Aceitera General Deheza SA	1.0	0.9	1.1	1.0	1.3
NMZhK GK	2.2	1.9	1.4	1.3	1.2
Lactalis, Groupe	1.2	1.4	1.2	1.2	1.2
Private Label	0.8	1.1	1.2	1.4	1.6
Others	33.1	29.2	29.3	28.6	27.4

Source: Euromonitor International, Oils and Fats in Russia, 2012

*GBO stands for Global Brand Owner.

Note: At the time of writing this report, 2010 was the latest available company share data.

► BRAND SHARES



- ▶ The Russian oils and fats market has a variety of brands, most with less than a 1% share of the market. According to Euromonitor (2011), the newly launched high quality premium labels will not likely show significant presence in the market, since Russian consumers still tend to choose less expensive products with relatively good quality. In terms of the oils' origin, vegetable oils were mostly domestic brands with a limited number of imported brands, whereas the majority of olive oils were imported.
- ▶ During the 2006 to 2010 period, Zolotaya Semechka (Yug Rusi APG) maintained the leading position in Russia's oils and fats market. The brand experienced a decrease in share in 2007, but showed fast recovery in 2008. Zolotaya Semechka's brand share was 9.1% in 2010.
- ▶ The Milora brand (W J Group) maintained the second position in Russia's oils and fats market from 2006 to 2010. In 2009 and 2010, the brand registered a 3.4% share, a slight decrease from 2008. Other major brands such as Sloboda (Efko ZAO), Zlato (Yug Rusi APG), and 33 Korovy (Wimm-Bill-Dann Produkty Pitania OAO) maintained a consistent share over the 2006-2010 period.

Russia's Oils and Fats Brand Shares by Retail Sales Value (Historic) — % Breakdown

Brand	Company (GBO*)	2006	2007	2008	2009	2010
Zolotaya Semechka	Yug Rusi APG	8.2	7.7	9.0	8.9	9.1
Milora	W J Group	2.9	3.1	3.6	3.4	3.4
Sloboda	Efko ZAO	2.3	2.4	2.6	2.7	2.8
Zlato	Yug Rusi APG	2.1	2.5	3.0	2.6	2.8
33 Korovy	Wimm-Bill-Dann Produkty Pitania OAO	1.7	2.0	2.3	2.9	2.8
Oleina	Bunge Ltd	2.7	2.5	2.5	2.6	2.6
Smolenskoye	Demiurg ZAO	1.6	1.9	2.0	2.5	2.2
Vologodskoe	Vologodsky Molkombinat OAO	1.8	2.0	1.9	2.4	2.2
Ideal	Bunge Ltd	1.9	1.9	1.9	2.0	2.0
Ostankinskoe	Ostankinsky Molkombinat OAO	1.6	1.9	2	2.2	2.0
Valio	Valio Oy	2.3	2	1.7	1.9	2.0
Zateya	Aston Group	0.5	0.7	1.8	1.9	1.9
Rama	Unilever Group	2.9	2.4	2.1	2.0	1.9
Rossianka	Solnechnye Produkty Holding ZAO	1.1	1.4	1.6	1.7	1.9
Anchor	Fonterra Co-operative Group	1.8	2.1	1.6	1.7	1.7
Domik v Derevne	Wimm-Bill-Dann Produkty Pitania OAO	1.0	1.2	1.3	1.7	1.6
Fin	Valio Oy	1.1	1.2	0.9	1.3	1.4
Moya Semya	Heinz Co, HJ	1.7	1.6	1.4	1.3	1.3
Avon Natura	Aceitera General Deheza SA	1.0	0.9	1.1	1.0	1.3
Razdolye	W J Group	1.5	1.4	1.3	1.2	1.2
Krestyanskoye	Wimm-Bill-Dann Produkty Pitania OAO	0.7	0.8	0.8	1.1	1.2
Private label		0.8	1.1	1.2	1.4	1.6
Others		49.3	46.3	44.4	41.4	41.3

Source: Euromonitor International, Oils and Fats in Russia, 2012

*GBO stands for Global Brand Owner.

Note: At the time of writing this report, 2010 was the latest available company share data.

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Sunflower seed oils displayed at a hypermarket (O'Key) in Russia
Source: Planet Retail, 2012



Cooking oils displayed at a supermarket (O'Key) in Russia
Source: Planet Retail, 2012



Olive oils at a supermarket (X5 Retail Group) in Russia
Source: Planet Retail, 2012

► ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL



- ▶ According to Mintel, there were 45 new food product* launches containing canola/rapeseed oil in Russia between January 2007 and December 2011.

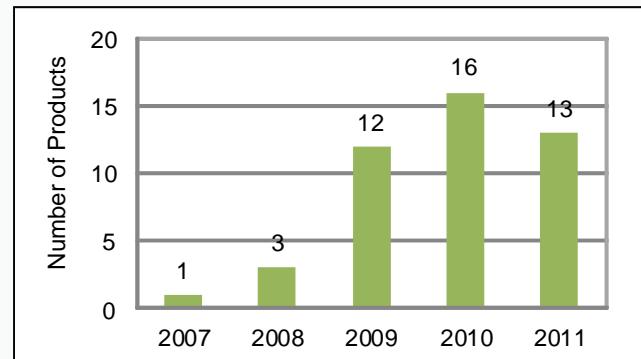
Launch Type

- ▶ Of the 45 launches, 26 products were new products, representing 58% of the total sample. The other major launch type was new variety/range extension with 14 products. There were three products with new packaging and two with a new formulation.

Product Categories

- ▶ Bakery was the most common category for the new products with canola/rapeseed oils, with 13 of the launches. Within the bakery category, there were five products in the cakes, pastries and sweet good sub-category, and five under the sweet biscuits/cookies sub-category.
- ▶ The next most popular category was sauces & seasonings with eight products, including seven mayonnaise products and one dressing and vinegar product. Other major categories include savoury spreads, chocolate confectionery, and meals and meal centers, each with four products.

New Food Products with Canola/Rapeseed Oil Launched in Russia from 2007 to 2011 by Year



Source: Mintel, 2012

New Food Products with Canola/Rapeseed Oil Launched in Russia from 2007 to 2011 by Category

Category	Number of Products
Bakery	13
Sauces and seasonings	8
Baby food	5
Savoury spreads	4
Chocolate confectionery	4
Meals & meal centers	4
Processed fish, meat and egg	3
Breakfast cereals	2
Snacks	1
Dairy	1
Total	45

Source: Mintel, 2012



*Gerber's Italian Style Delicacy by Nestlé
(contains rapeseed oil)*
Source: Mintel, 2012



*Milka's I Love Milka by Kraft Foods
(contains canola oil)*
Source: Mintel, 2012



*Nestlé Fitness' Wholegrain Wheat Flakes with Strawberry by Cereal Partners
(contains rapeseed oil)*
Source: Mintel, 2012

* Note: The search results excludes cooking oil products.



► ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL (continued)

Major Companies and Brands

- ▶ Kazanskiy Zhirovoy Kombinat launched six new food products with canola/rapeseed oils, all of which were mayonnaise products published under four brands. Kazanskiy Zhirovoy Kombinat's Mr. Rocco brand saw the most canola/rapeseed oil launches with three products.
- ▶ Nine companies each launched two products with canola/rapeseed oils, and 34 companies with one product each, across various types of the product categories.

Claims

- ▶ The most common claim for new food products with canola/rapeseed oil was GMO-free, with 10 products. The next most popular claim was no additives/preservatives with seven products. Other major claims were: for babies and toddlers, age 0-4 (5 products); functional (3 products); and ethical-environmentally friendly packages (3 products). The rest of the claims focused on health benefits and nutrient properties.

Major Fat Ingredients Used with Canola/Rapeseed Oil

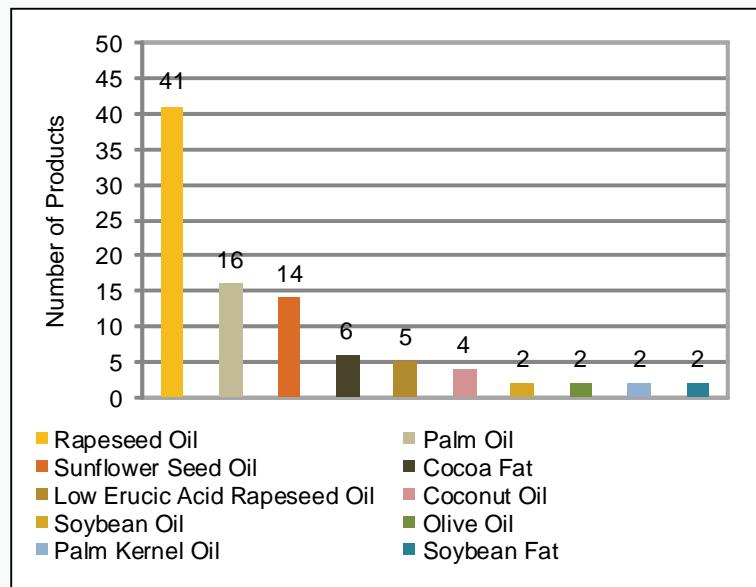
- ▶ Canola/rapeseed oils were identified as either rapeseed oil or low erucic acid rapeseed oil in the ingredient description. There were 41 products identified as rapeseed oil, and five low erucic acid rapeseed oil products.
- ▶ The most common fat ingredient used with canola/rapeseed oil was palm oil (16 products) followed by sunflower seed oil (14 products).

New Food Products with Canola/Rapeseed Oil Launched in Russia from 2007-2011 by Top 10 Companies

Company	Number of Products
Kazanskiy Zhirovoy Kombinat	6
AFK-Logistics	2
Auchan	2
Delic-Pol	2
Khlebnyy Dom	2
Kraft Foods	2
Lu	2
Nutricia	2
Tago	2
Wagner Tiefkühlprodukte	2

Source: Mintel, 2012

Major Fat Ingredients Used in New Food Products with Canola/Rapeseed Oil*



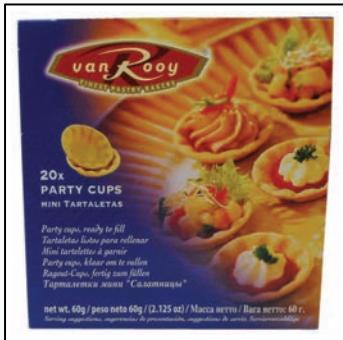
Source: Mintel, 2012

* Note: The total number of products exceeds 46 products since many products use more than one type of oil and fat ingredient.



► ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL (continued)

The following are some examples of new products containing canola/rapeseed oils as ingredients, launched in Russia between January 2007 and 2011, from the Mintel Global New Products Database (2012).



Mini Party Cups

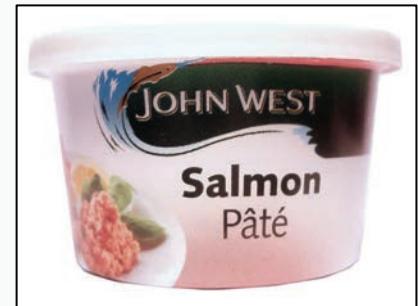
Company: Van Rooy
Brand: Van Rooy
Category: Bakery
Sub-Category: Cakes, pastries and sweet goods
Price (US\$): 4.54
Date Published: December 2011

Ingredients: Wheat flour, vegetable fats and oils (vegetable based), palm kernel stearin, palm oil, low erucic acid rapeseed oil, lupin flour (sweet), salt

Product Description: Van Rooy Tartaletki Mini (Mini Party Cups) are free from GMO. The product is available in a 60 gram pack.

Salmon Pâté

Company: John West
Brand: Maruesu
Category: Savoury spread
Sub-Category: Meat pastes and pâtés
Price (US\$): 3.91
Date Published: December 2011



Ingredients: Pink salmon, tuna, rapeseed oil, waters, dried egg whites (dry), milk proteins, potato fibre (source of dietary fibre), salt, herbal extracts (extract), flavouring substances, stabilisers (carrageenan, carob bean gum)

Product Description: John West Pashtet iz Lososya (Salmon Pâté) is free from artificial colours or preservatives. This product retails in a 125 gram recyclable pack.



Prosciutto Mini Pizzas

Company: Wagner Tiefkühlprodukte
Brand: Buitoni Piccolinis
Category: Meals and meal centres
Sub-Category: Pizzas
Price (US\$): 5.16
Date Published: November 2011

Ingredients: Wheat flour, tomato (chopped), edam cheese (food colours), beta-carotene, waters, ham (cooked, ham, salt, sodium nitrite (preservatives)), glucose, herbal extracts (extract), vitamin C (food acids, antioxidants), smoke extract), rapeseed oil, whole milk powder (whole, powdered), yeast, salt, lecithin (emulsifiers), white sugar, herbs and spices, glucose

Product Description: Buitoni Piccolinis Prosciutto Mini Pizzas are now available. The product retails in a 270 gram pack containing nine pieces.

Source for all: Mintel, 2012

► ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL
(continued)



Mayonnaise with Extra Virgin Olive Oil

Company: Kazanskiy Zhirovoy Kombinat

Brand: Mr. Ricco

Category: Sauces and seasonings

Sub-Category: Mayonnaise

Price (US\$): 2.24

Date Published: July 2011

Ingredients: Sunflower seed oil (refined), rapeseed oil (refined), olive oil (refined), white sugar, stabiliser (stabiimpul's), salt, acetic acid (food acids), extra virgin olive oil (extra virgin), egg yolks, preservatives (potassium sorbate, sodium benzoate), nature identical mustard flavour, antioxidant, natural colourant

Product Description: Mr. Ricco Olivkovyy Mayonez (mayonnaise with extra virgin olive oil) is free from GMOs and contains 67% fat. The product retails in 420 gram pack.

Cheese Balls in Rape Oil

Company: Baltä Majä

Brand: Hermis

Category: Dairy

Sub-Category: Soft cheese and semi-soft cheese

Price (US\$): 3.63

Date Published: February 2011



Ingredients: Cheese and cheese products (pasteurised milk), salt, calcium chloride, milk-clotting ferment, mesophilic cultures, paprika, garlic, rapeseed oil

Product Description: Hermis Syrnye Snezhki (cheese balls in rapeseed oil) contain soft cheese pieces with paprika in rape oil. This product retails in a 240 gram pack.



Sour Milk Baby Formula for Healthy Children

Company: Blédina

Brand: Nutricia Nutrilon

Category: Baby food

Sub-Category: Baby formula (0-6 months)

Price (US\$): 9.78

Date Published: December 2010

Ingredients: Skim milk (skimmed), demineralized whey (demineralised), maltodextrin, vegetable oils (mixed, vegetable based), palm oil, coconut (coconut derived), low erucic acid rapeseed oil, sunflower seed oil), lactose, taurine, ferment (lactic bacteria, bifidobacterium), inositol, lecithin, vitamins (complex), minerals, micro elements

Product Description: Nutricia Nutrilon Kislomolochnyy Sukhaya Molochnaya Smes' dlya Zdorovykh Detey (sour milk baby formula for healthy children) is made with bifidus bacteria to help improve digestion and maintain healthy intestinal flora. The product is suitable for babies from birth and retails in a 400 gram pack.

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

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