



# Import of dairy ingredients: new rules of play. Who will survive?

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# Content:

-  **Fonterra world wide**
-  **What's going on in Russia ?**
-  **How exporter became importer ?**
-  **Challenge boundaries**
-  **Summary**

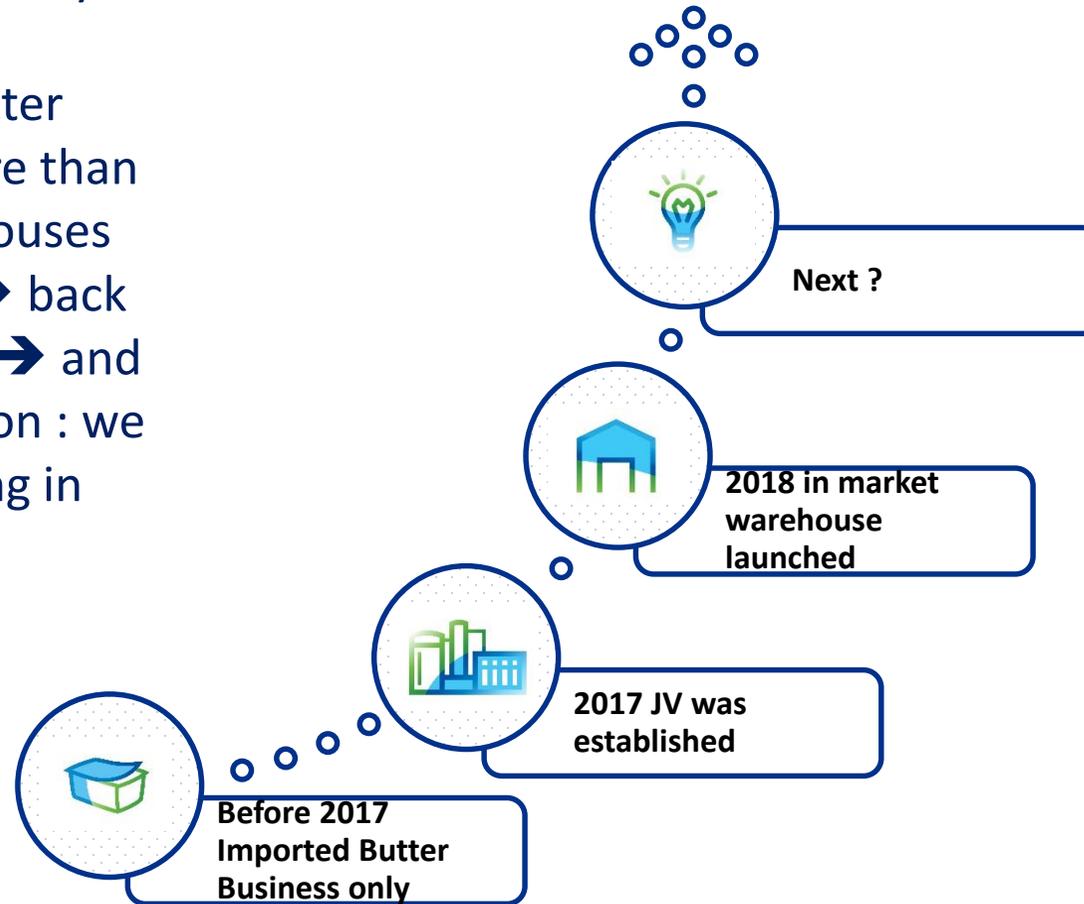
# Fonterra world wide



# What's going on in Russia ?

Long history and long way:

from small office (butter sales only) → to more than 120 staff , few warehouses in different regions → back again to small office → and finally came to decision : we need butter re-packing in Russia and in market warehouse.



# How Exporter became Importer ?

main drivers – Opportunities



Protein rich products – new trend



Growing foodservice channel



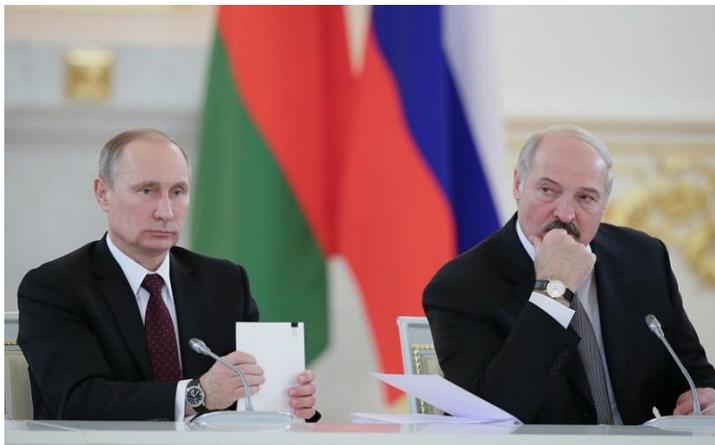
Growing sport nutrition channel



B2b consumers are more demanding

# How Exporter became Importer ?

main drivers – threats



Growing production in Russia and Belarus



Highly competitive offers from South America



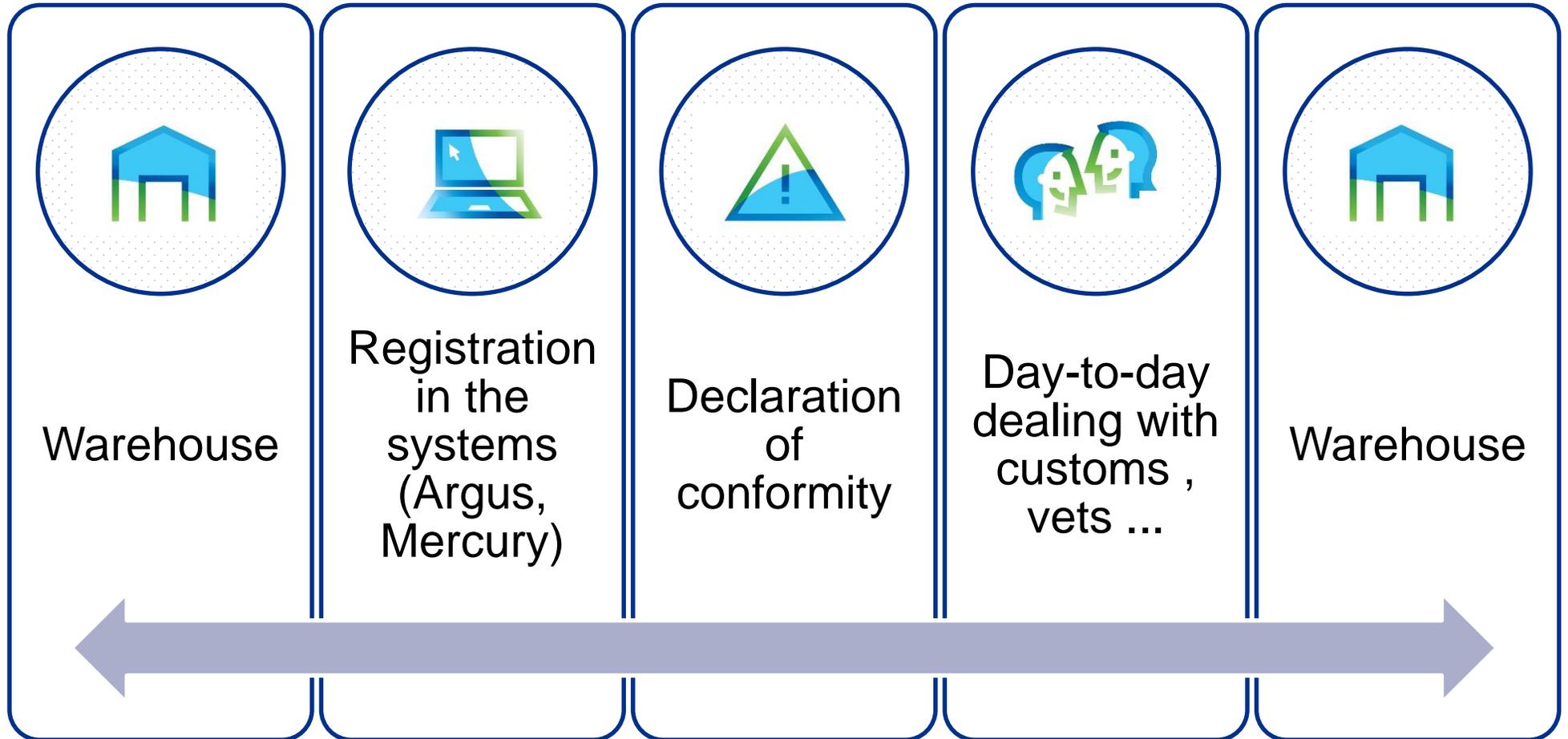
Fat blends – new trend for CIS?



Palm oil imports to Russia significantly grow YOY

# Challenge Boundaries

Administrative barriers and new rules



# Summary:



1. Successful exporter = diversified producer + trader
2. Sell products + services = sell added value
3. New rules of play generate new players

A close-up photograph of a person's hand holding a green plant stem. The hand is positioned on the left side of the frame, with fingers gently gripping the stem. The stem extends from the bottom left towards the top right. The background is a soft, out-of-focus green field. The text "THANK YOU" is centered at the bottom of the image.

**THANK YOU**