



XI молочная олимпиада

26–30 мая, Санкт-Петербург

FUTURE

OF THE DAIRY

INDUSTRY



SAINT PETERSBURG, 27.05.2019

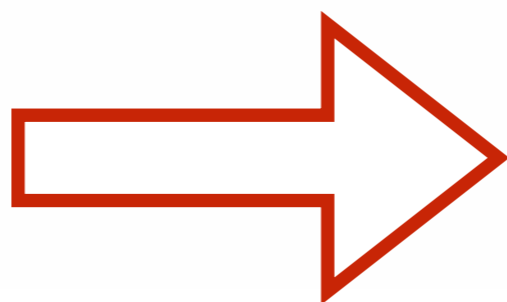


XI молочная олимпиада

26–30 мая, Санкт-Петербург



RUSSIAN
DAIRY
RESEARCH
CENTER



DAIRY
INTELLIGENCE
AGENCY



2014

IMPORT SUBSTITUTION



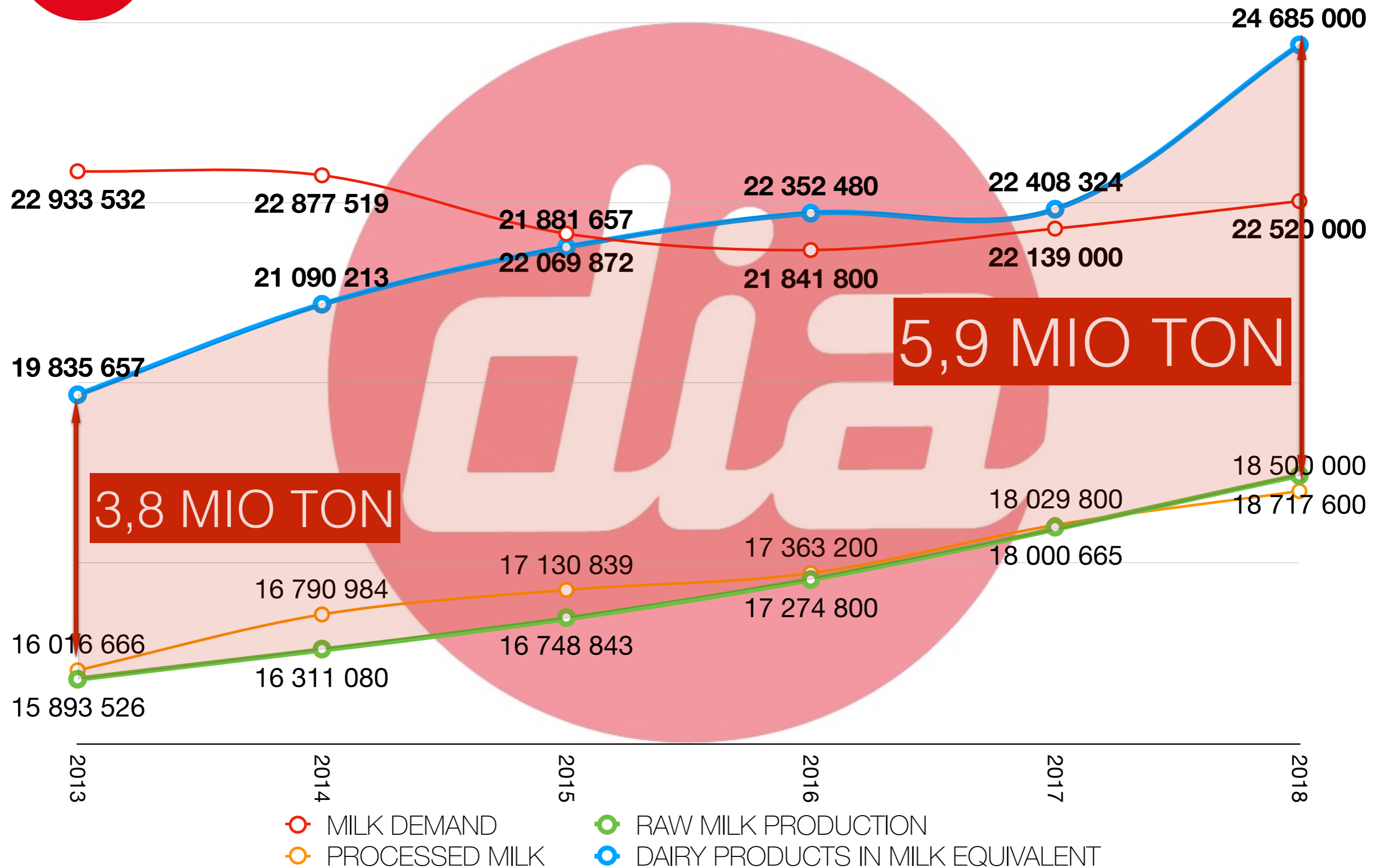
2018

EXPORT





IMPORT SUBSTITUTION DIDN'T TAKE PLACE

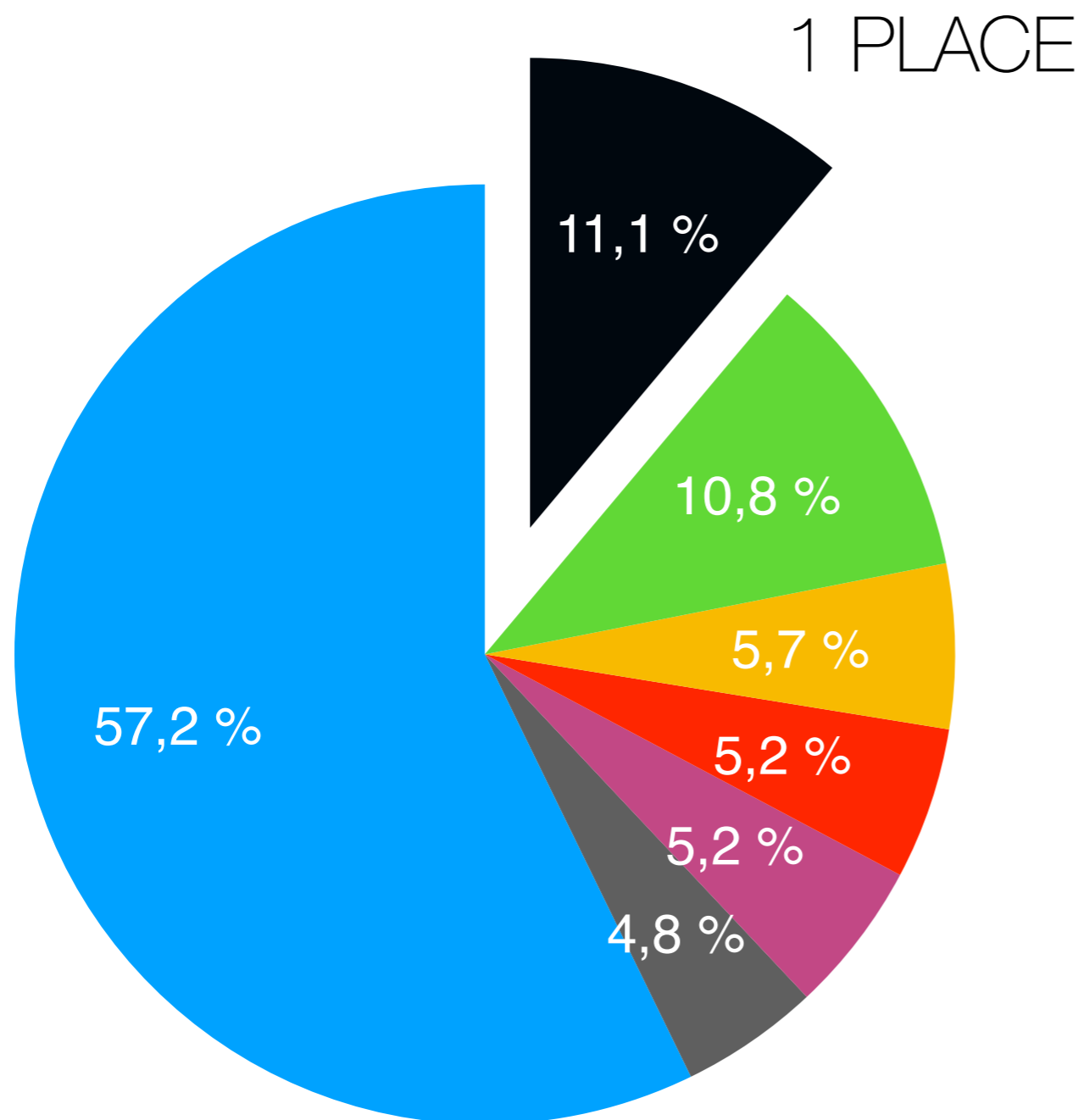




WHY DOES RUSSIA THINK ABOUT EXPORT?



BIGGEST IMPORTERS OF BUTTER



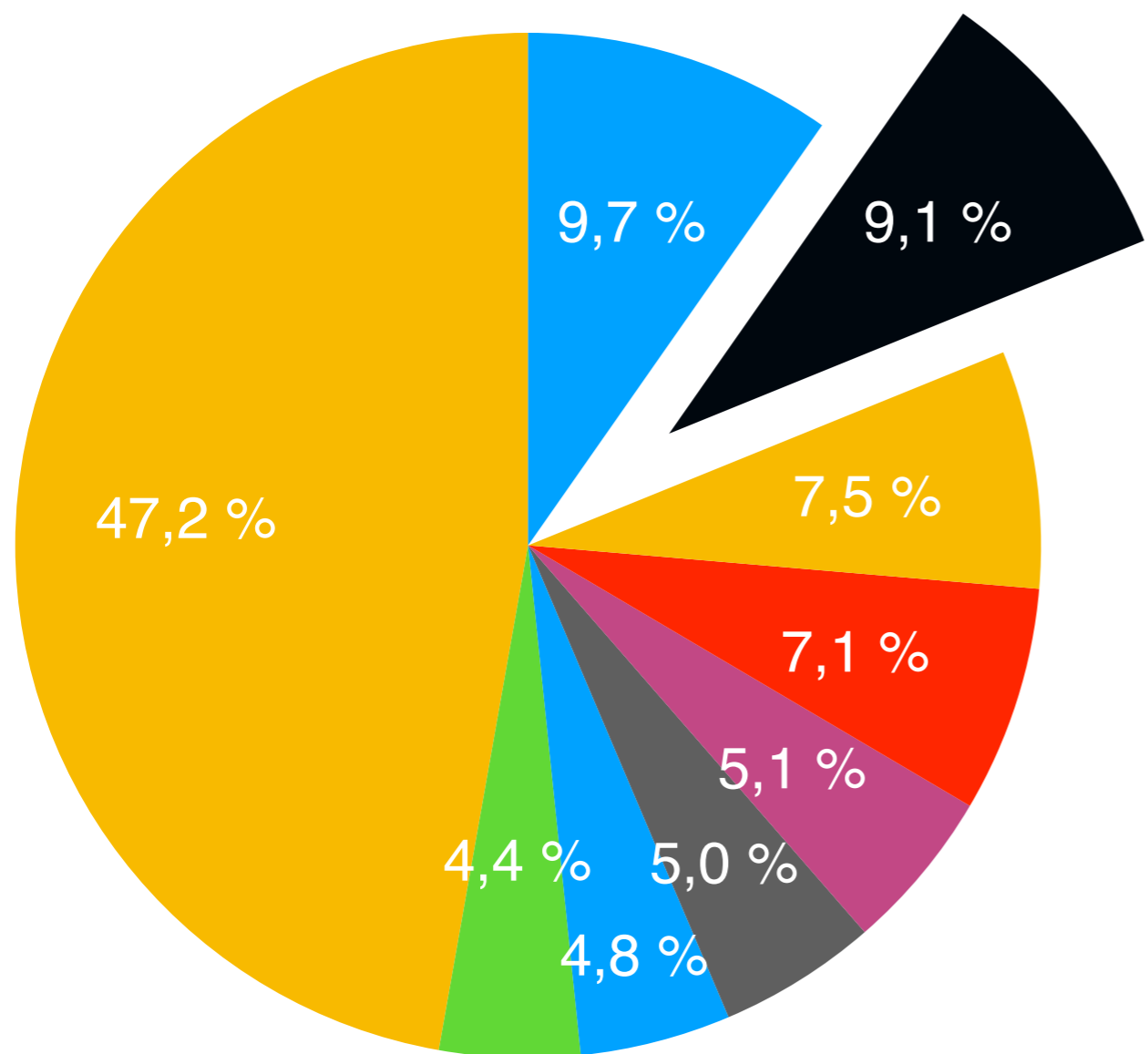
BUTTER IMPORT KTONS

RUSSIA	100
CHINA	97
SAUDI ARABIA	51
MEXICO	47
USA	47
INDONESIA	43
OTHERS	515



BIGGEST IMPORTERS OF CHEESE

2 PLACE



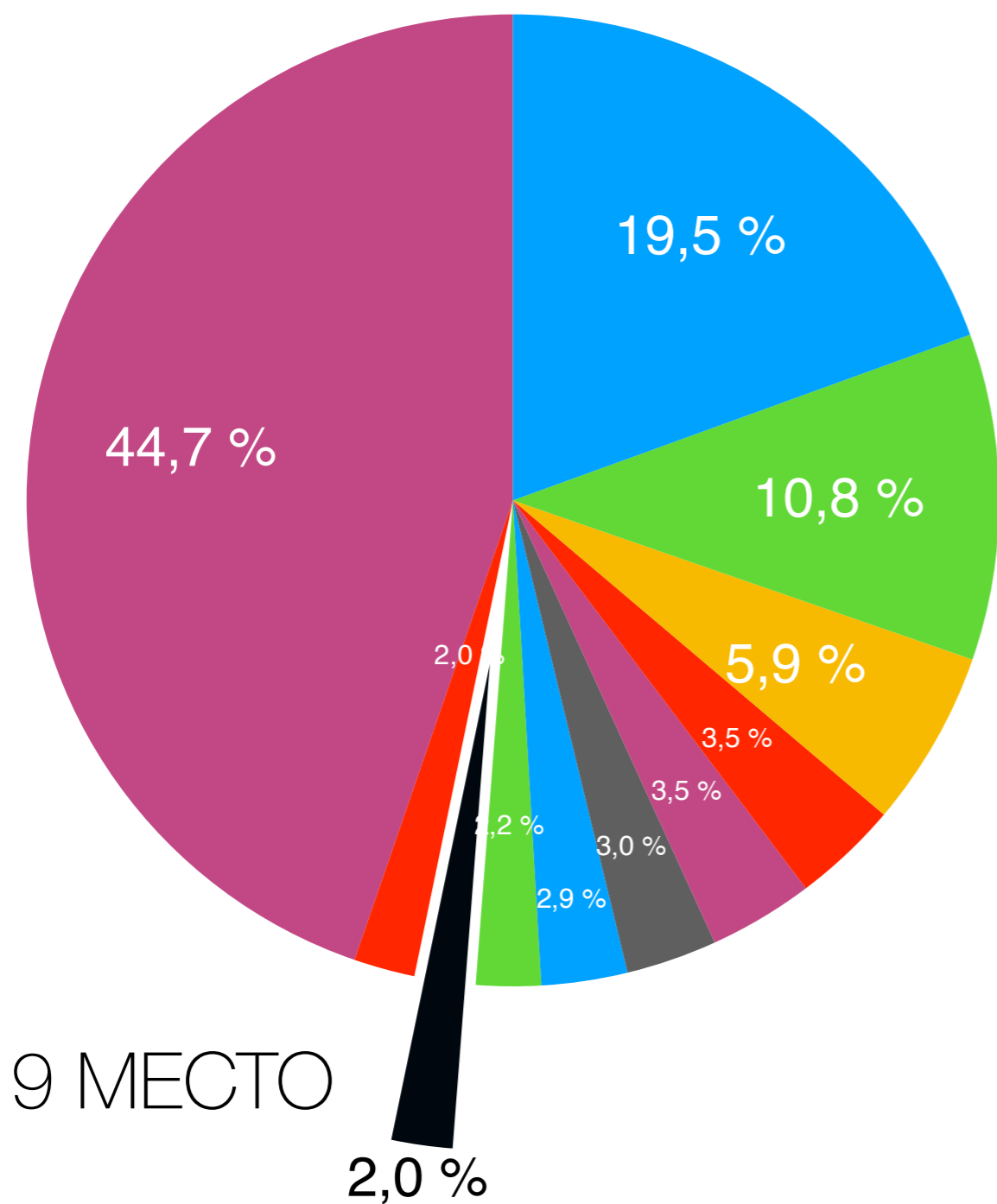
IMPORT OF CHEESE

JAPAN	237
RUSSIA	223
USA	183
SAUDI ARABIA	174
KOREA	125
MEXICO	122
AUSTRALIA	116
CHINA	108
OTHERS	1152



BIGGEST IMPORTER OF WMP

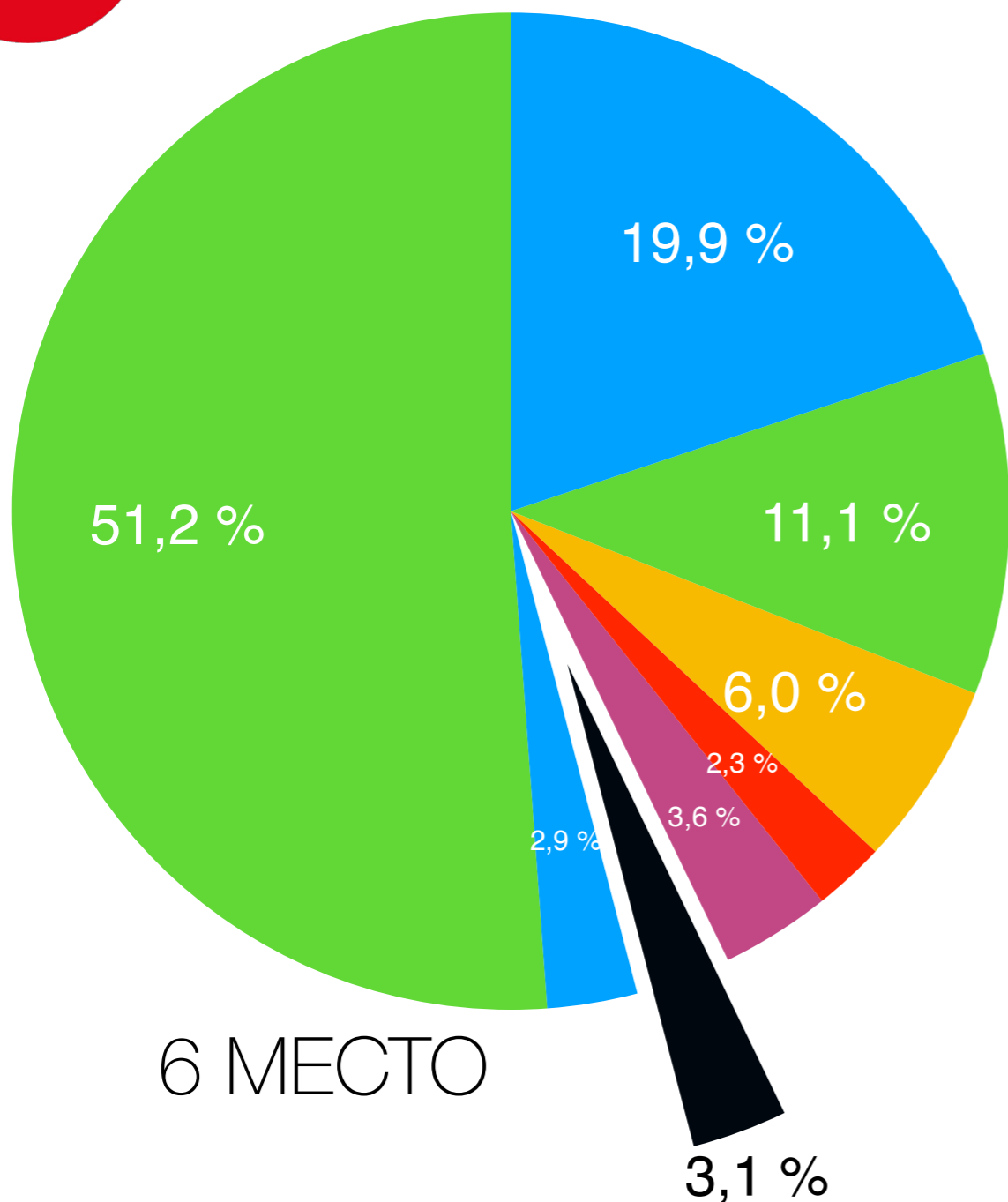
IMPORT OF WMP



CHINA	470
ALGERIA	262
SAUDI ARABIA	142
SRI LANKA	85
NIGERIA	84
BRASIL	73
SINGAPUR	69
INDONESIA	52
RUSSIA	49
MALASIA	49
OTHERS	1080



КРУПНЕЙШИЕ ИМПОРТЕРЫ СОМ В 2017 ГОДУ



ИМПОРТ СОМ, ТЫС. ТОНН

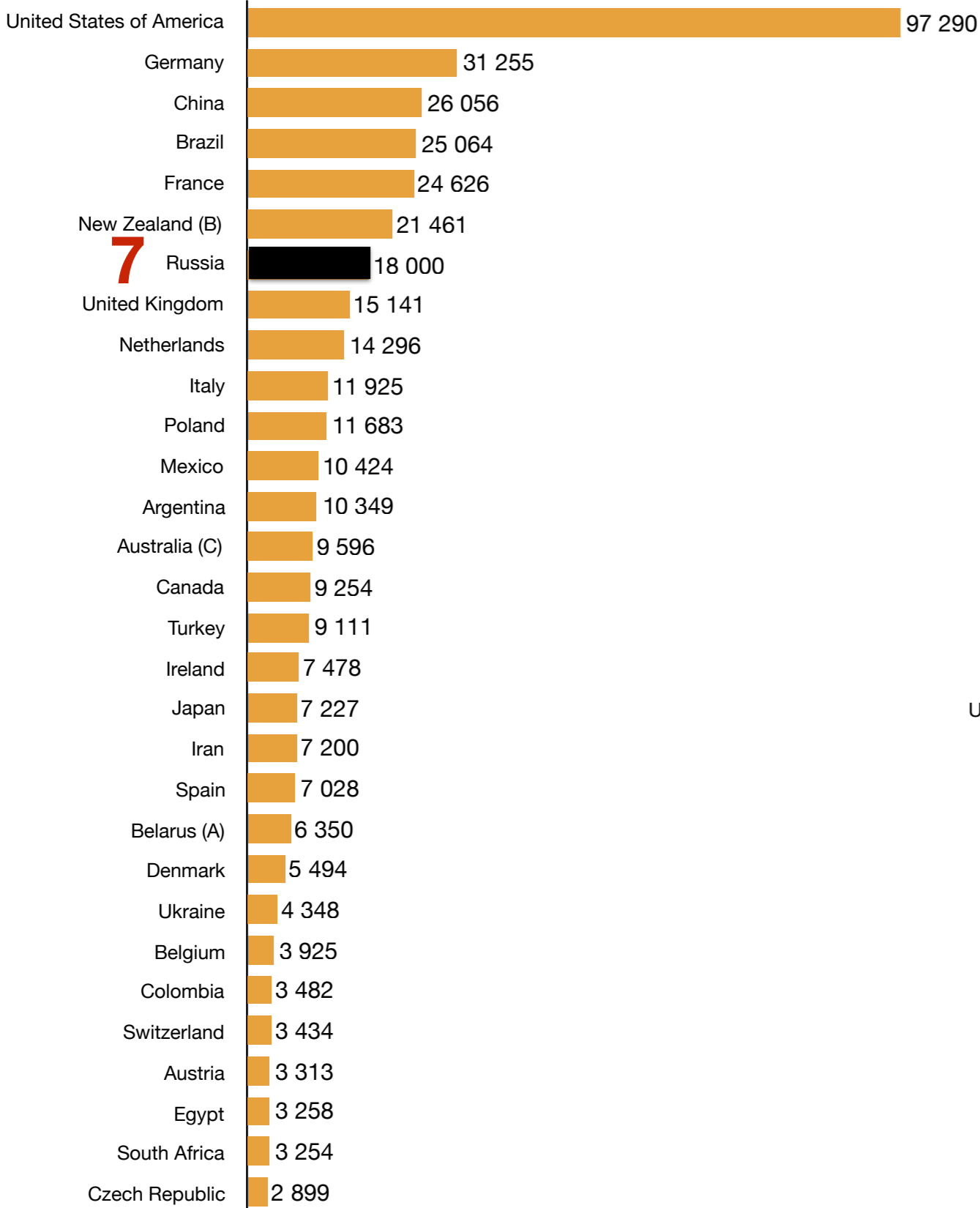
МЕКСИКА	470
КИТАЙ	262
ИНДОНЕЗИЯ	142
АЛЖИР	55
ФИЛИППИНЫ	84
РОССИЯ	73
МАЛАЗИЯ	69
ОСТАЛЬНЫЕ	1210

- МЕКСИКА
- ИНДОНЕЗИЯ
- ФИЛИППИНЫ
- МАЛАЗИЯ
- КИТАЙ
- АЛЖИР
- РОССИЯ
- ОСТАЛЬНЫЕ

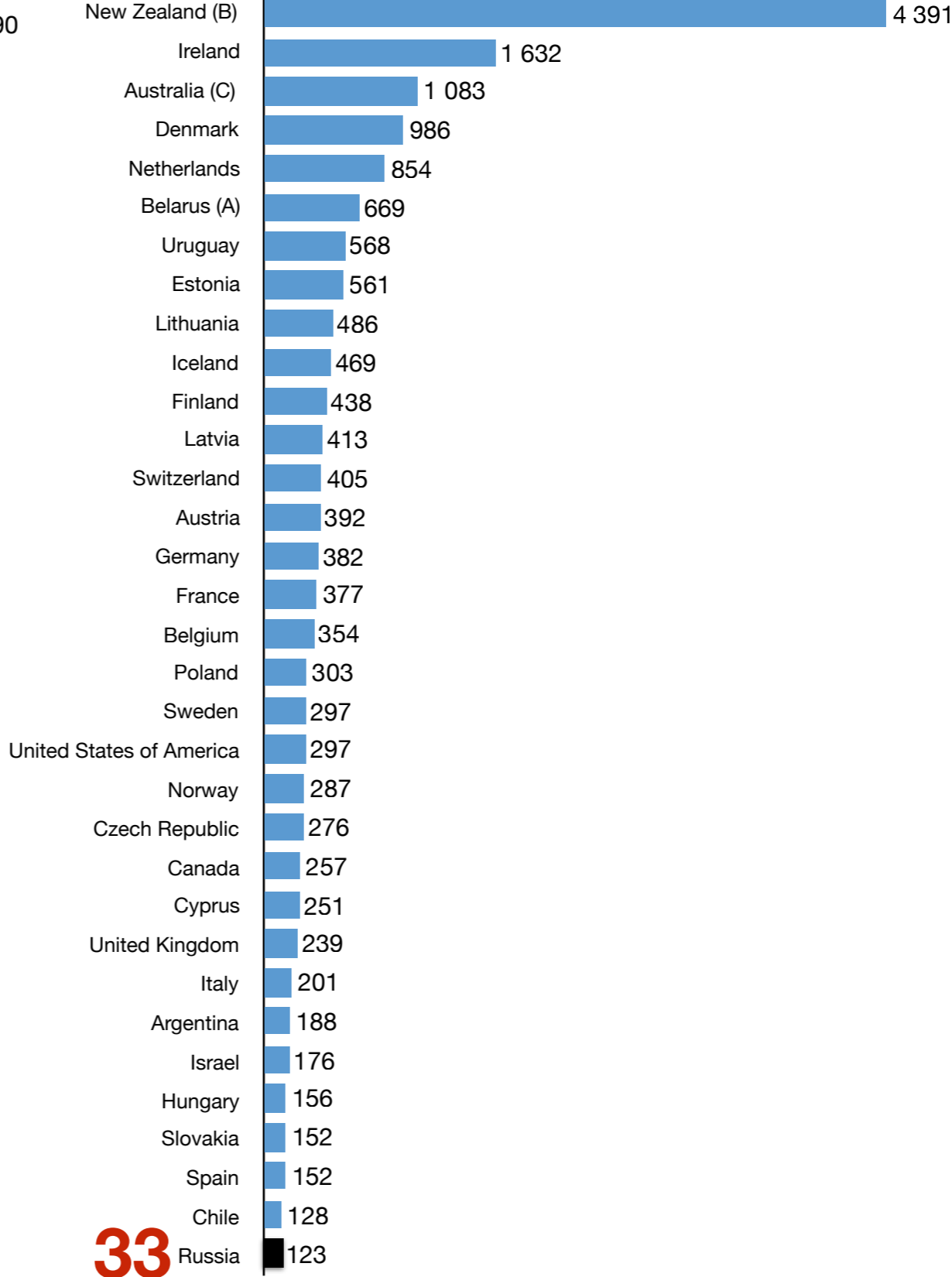


RAW MILK DELIVERY

TOTAL



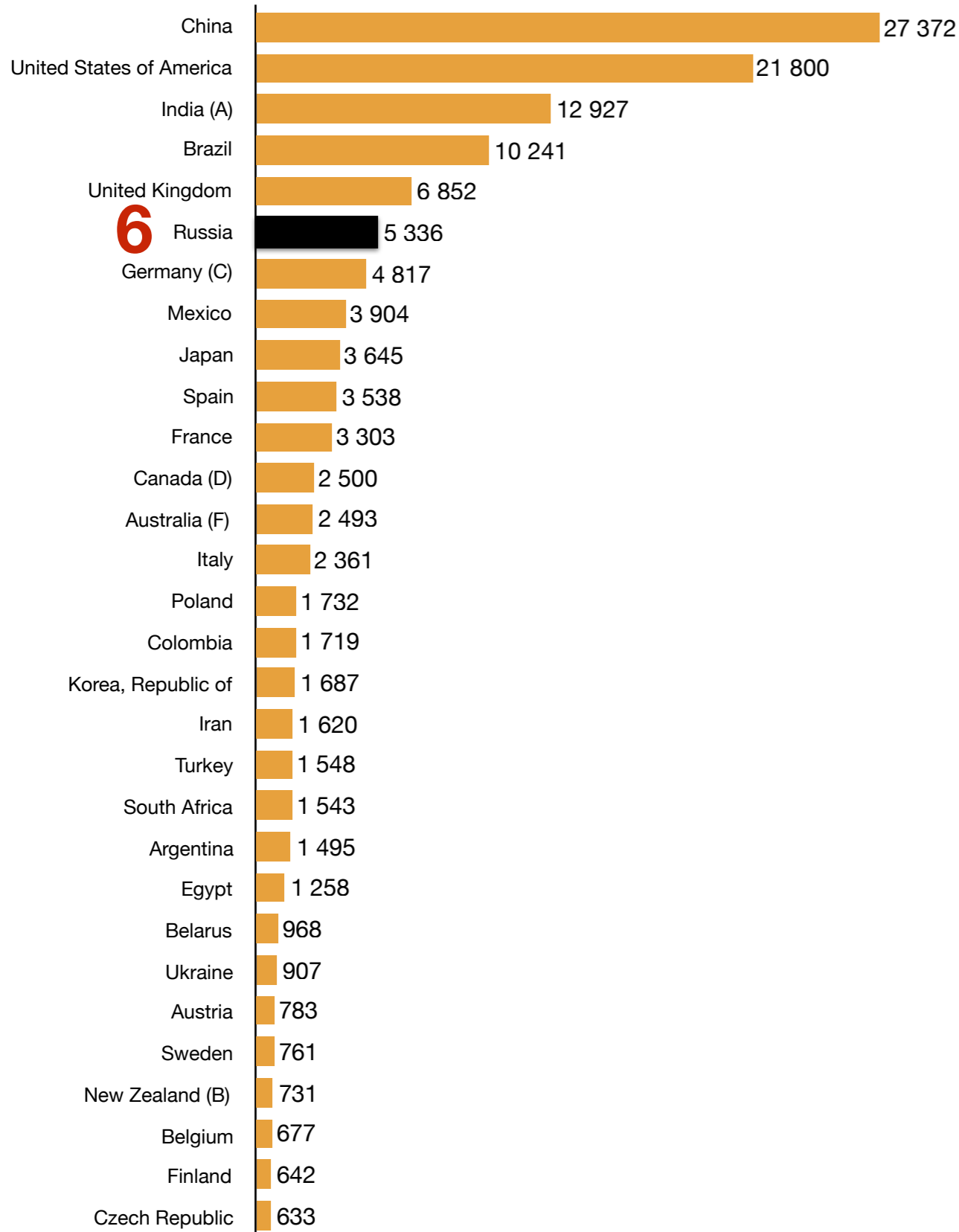
PER CAPITA



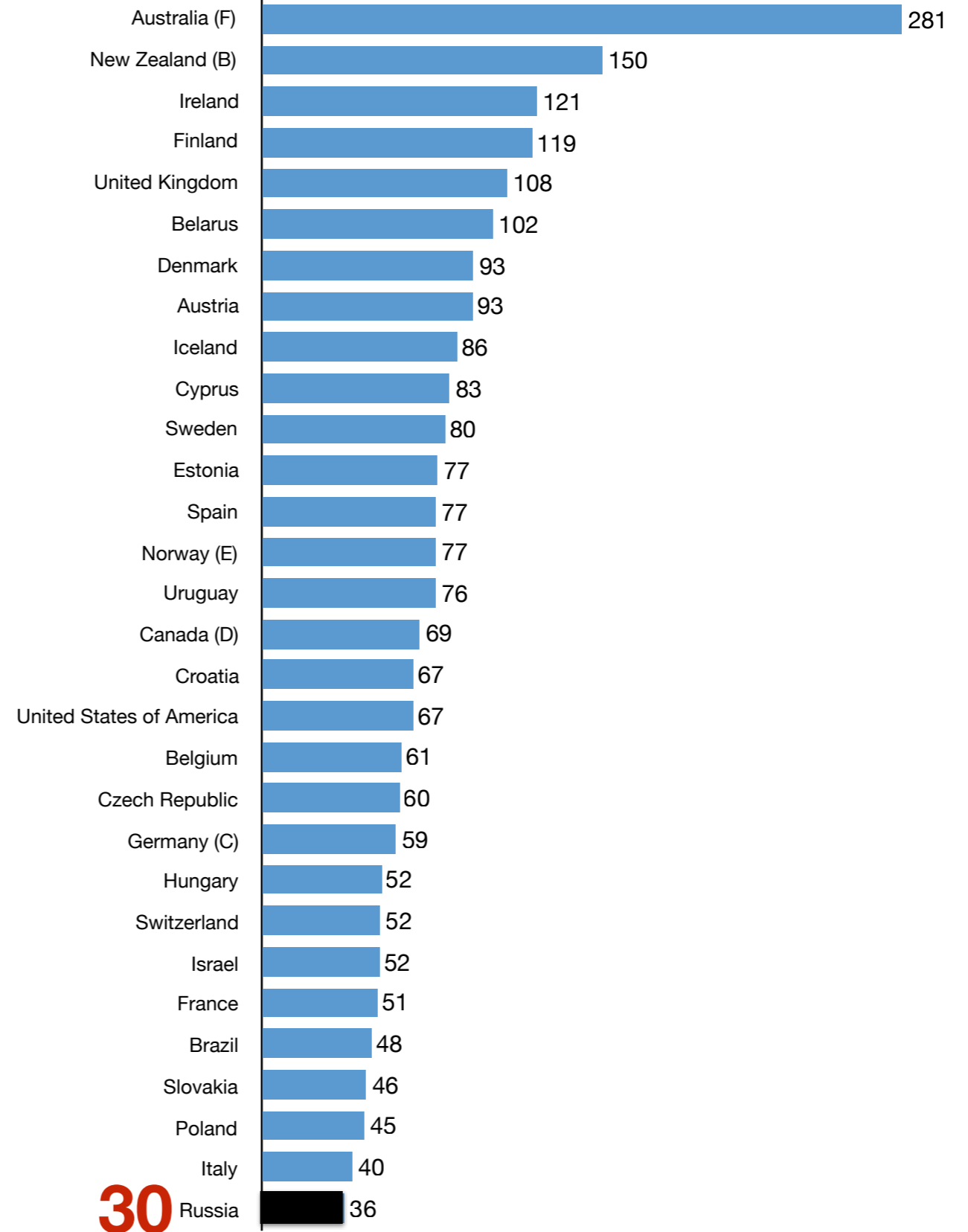


DRINKING MILK PRODUCTION

TOTAL



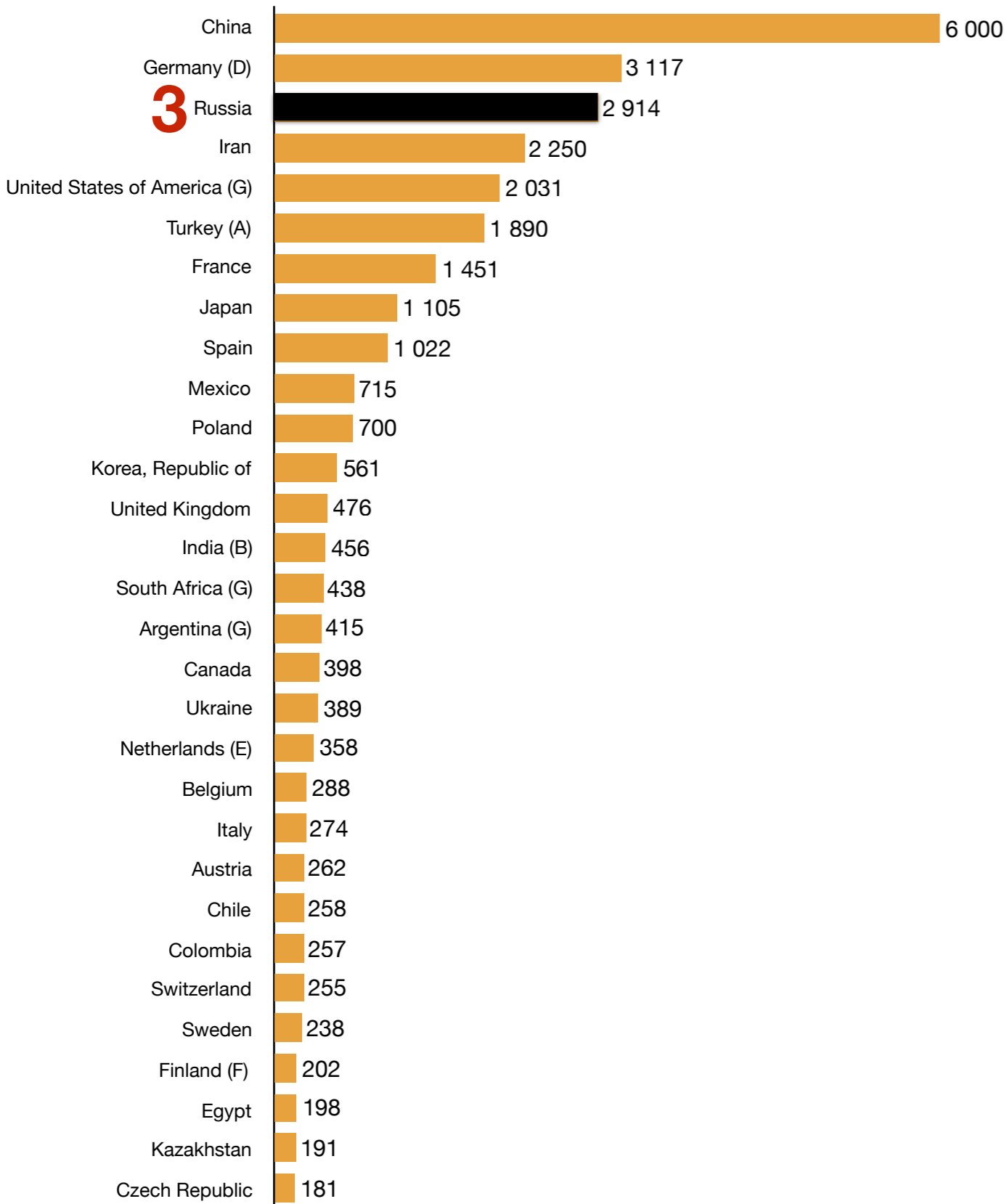
PER CAPITA



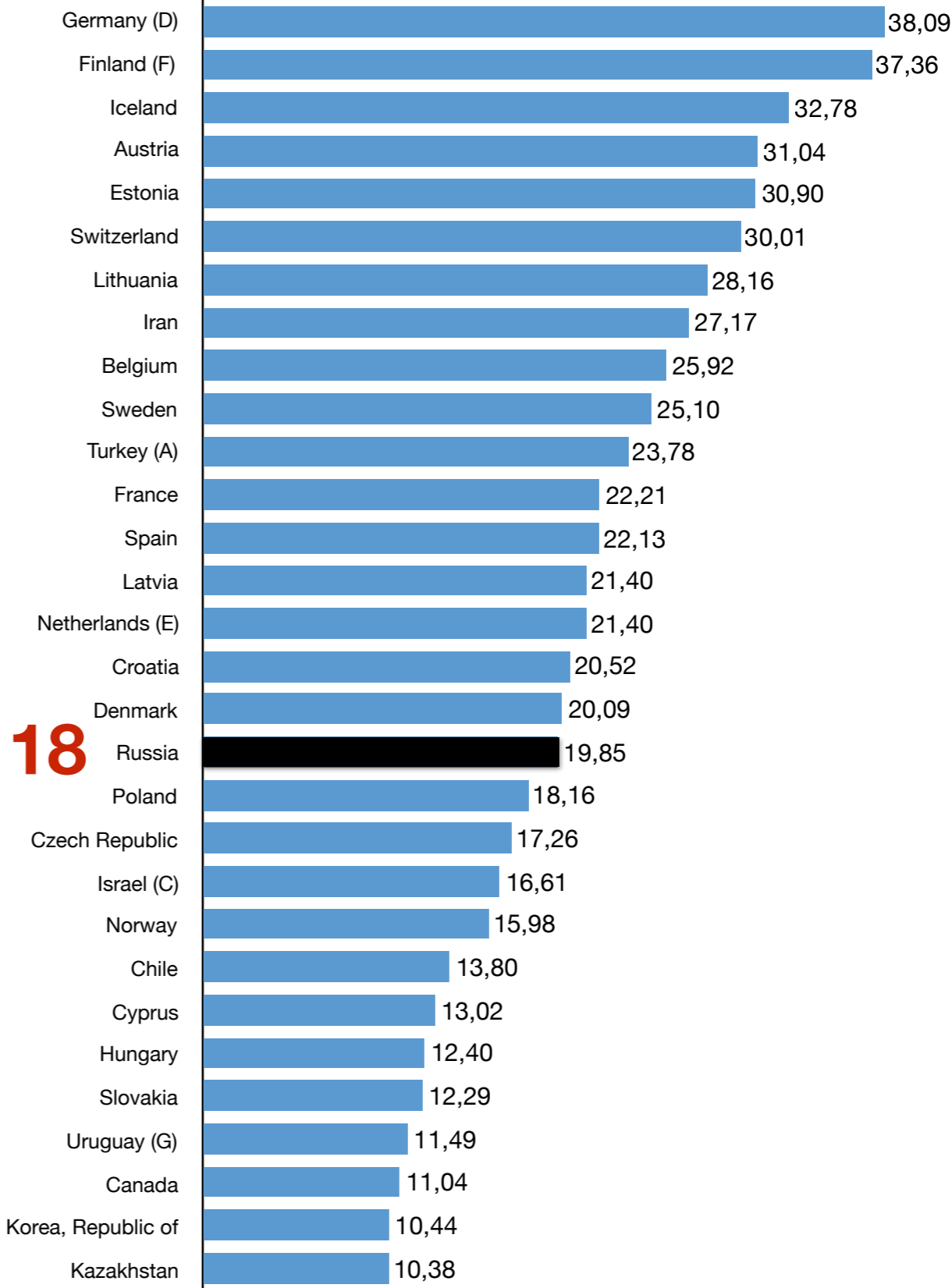


FERMENTED PRODUCTS PRODUCTION

TOTAL



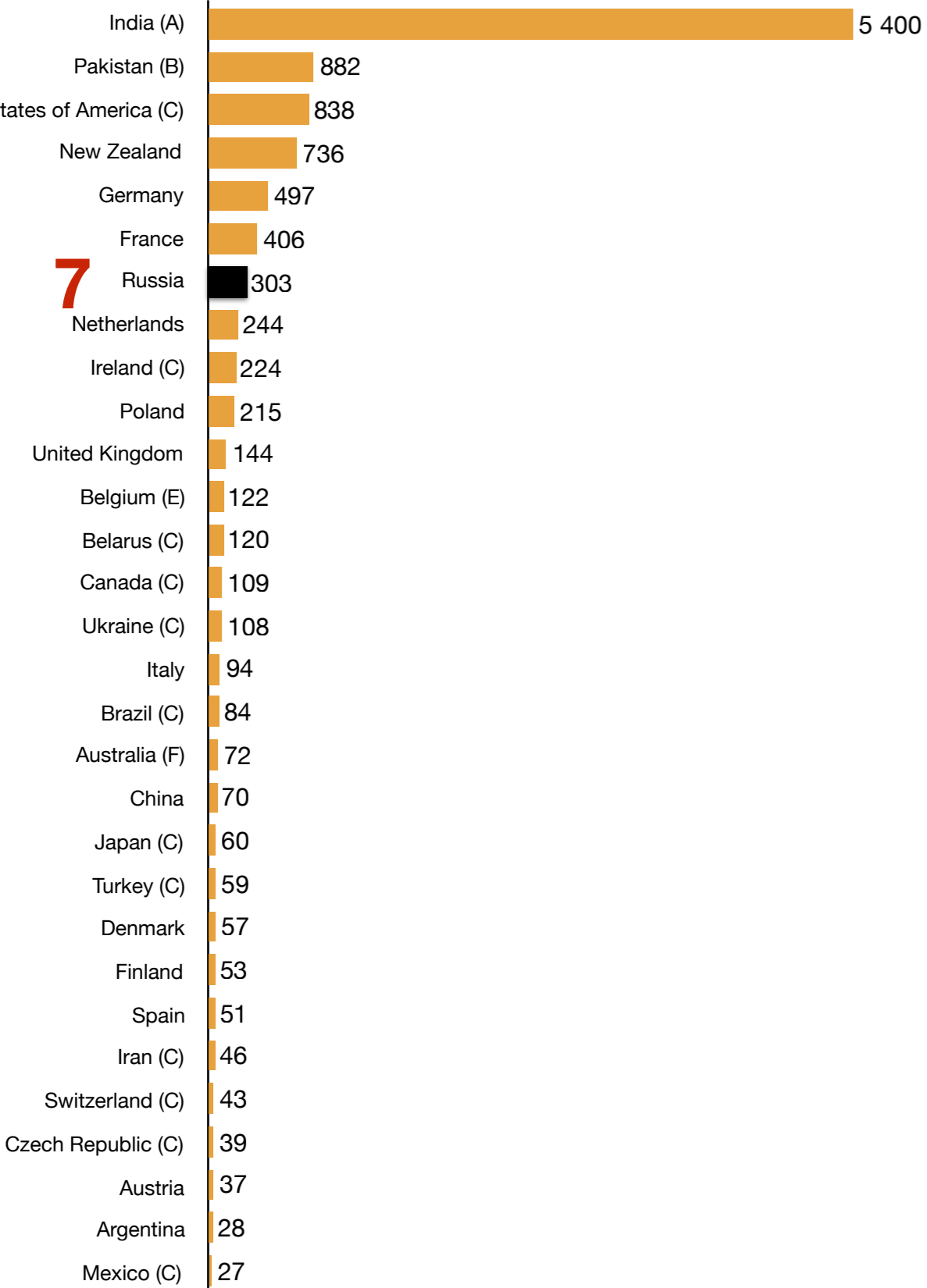
PER CAPITA



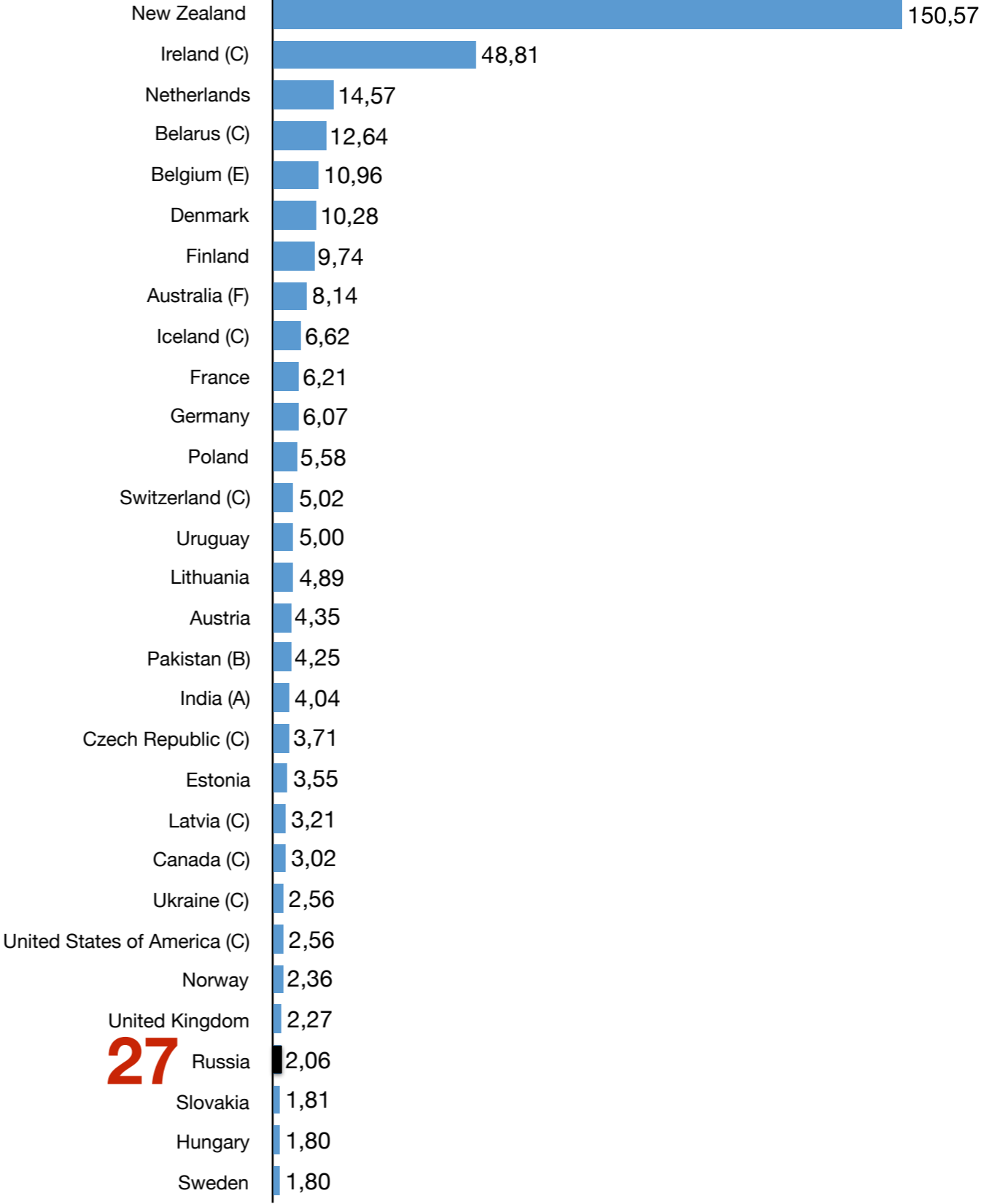


BUTTER PRODUCTION

TOTAL



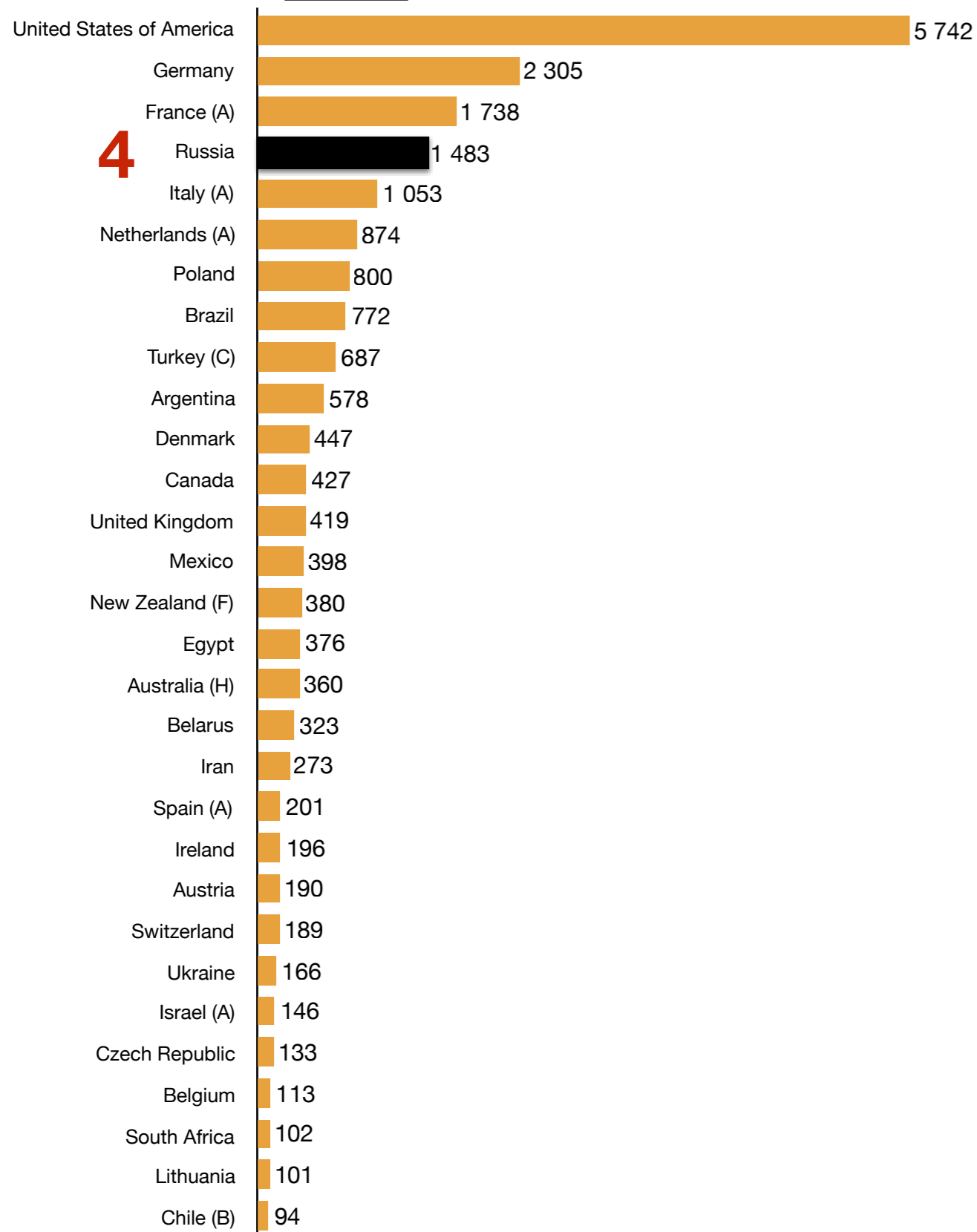
PER CAPITA



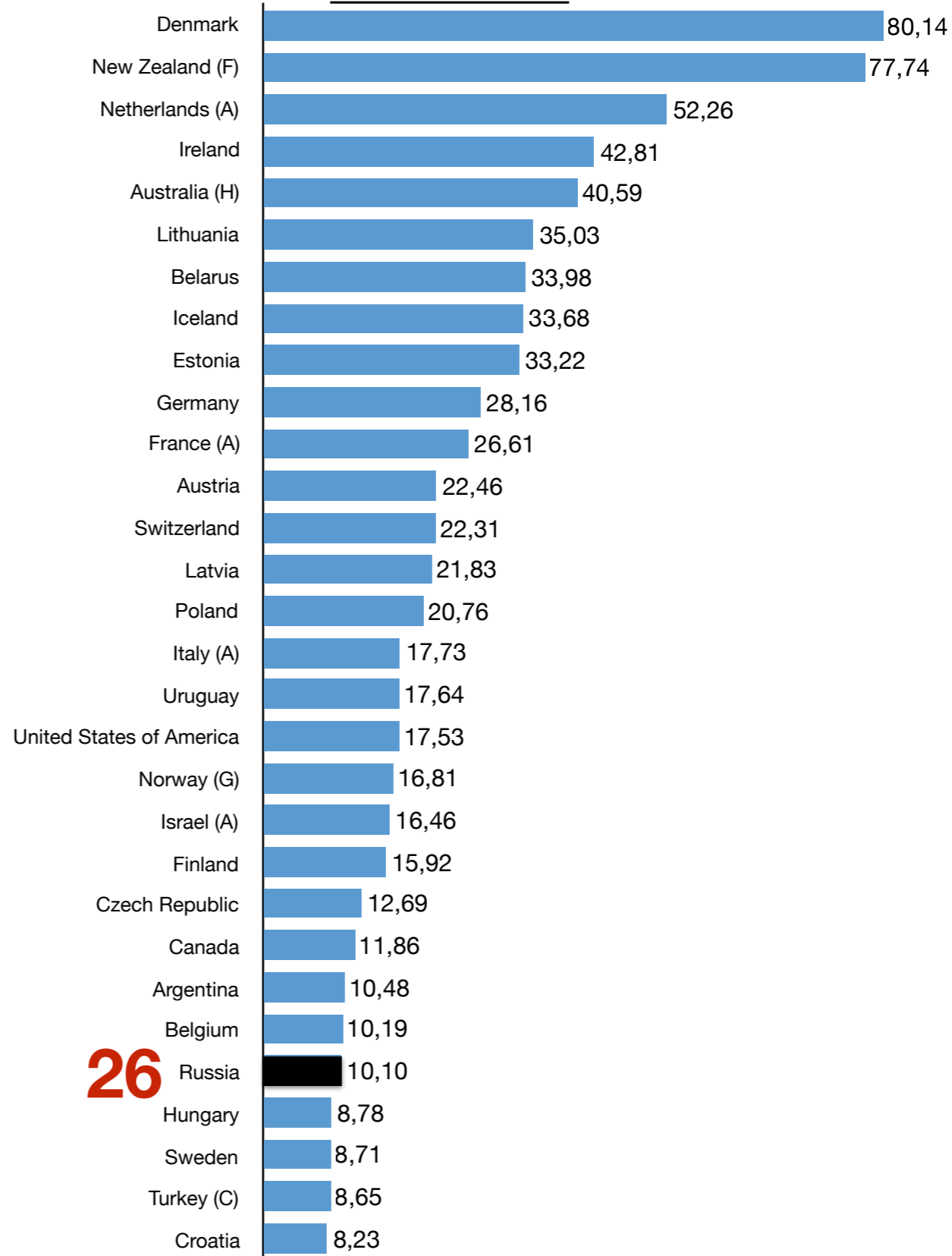


CHEESE PRODUCTION

TOTAL



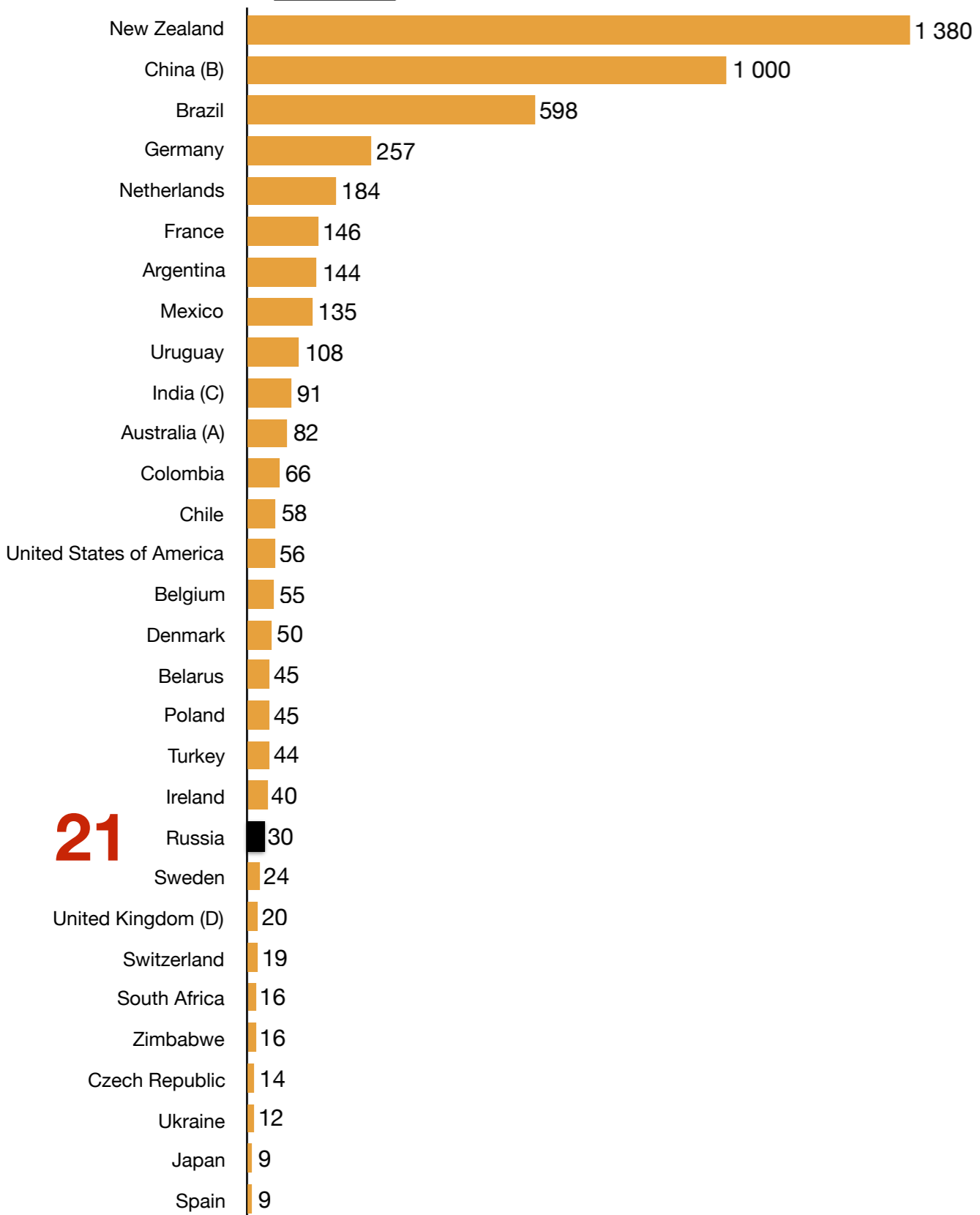
PER CAPITA





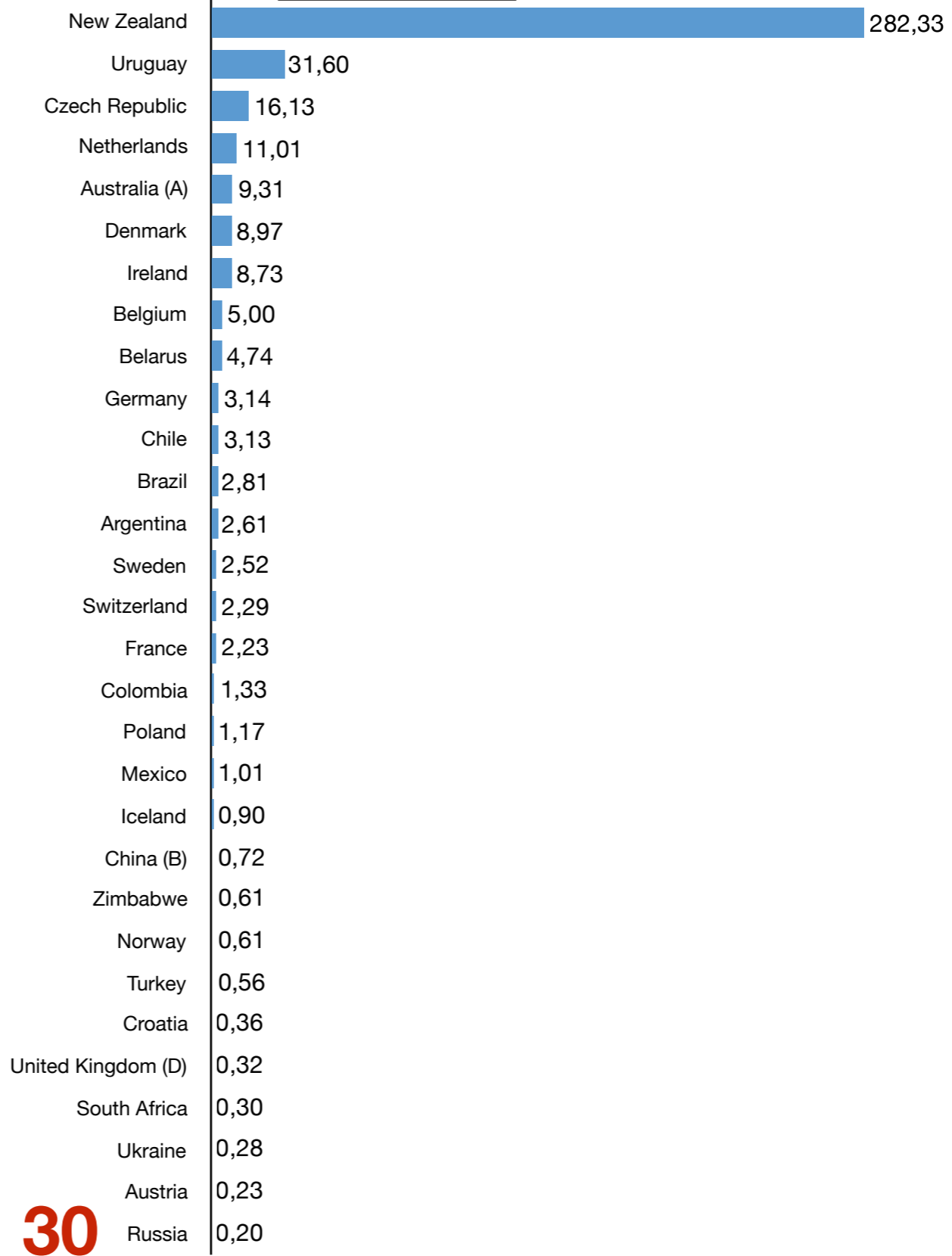
WLP PRODUCTION

TOTAL



21

PER CAPITA

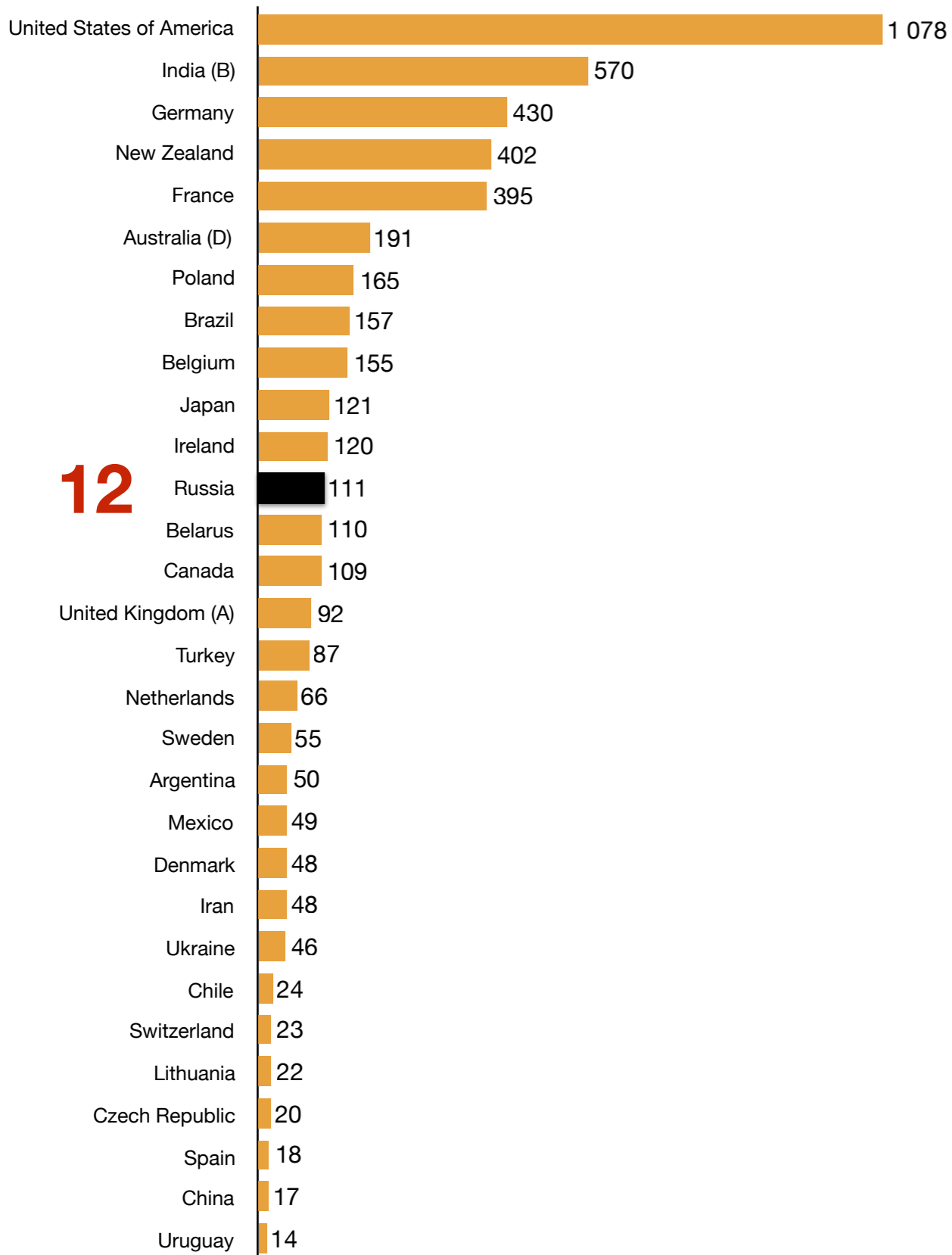


30

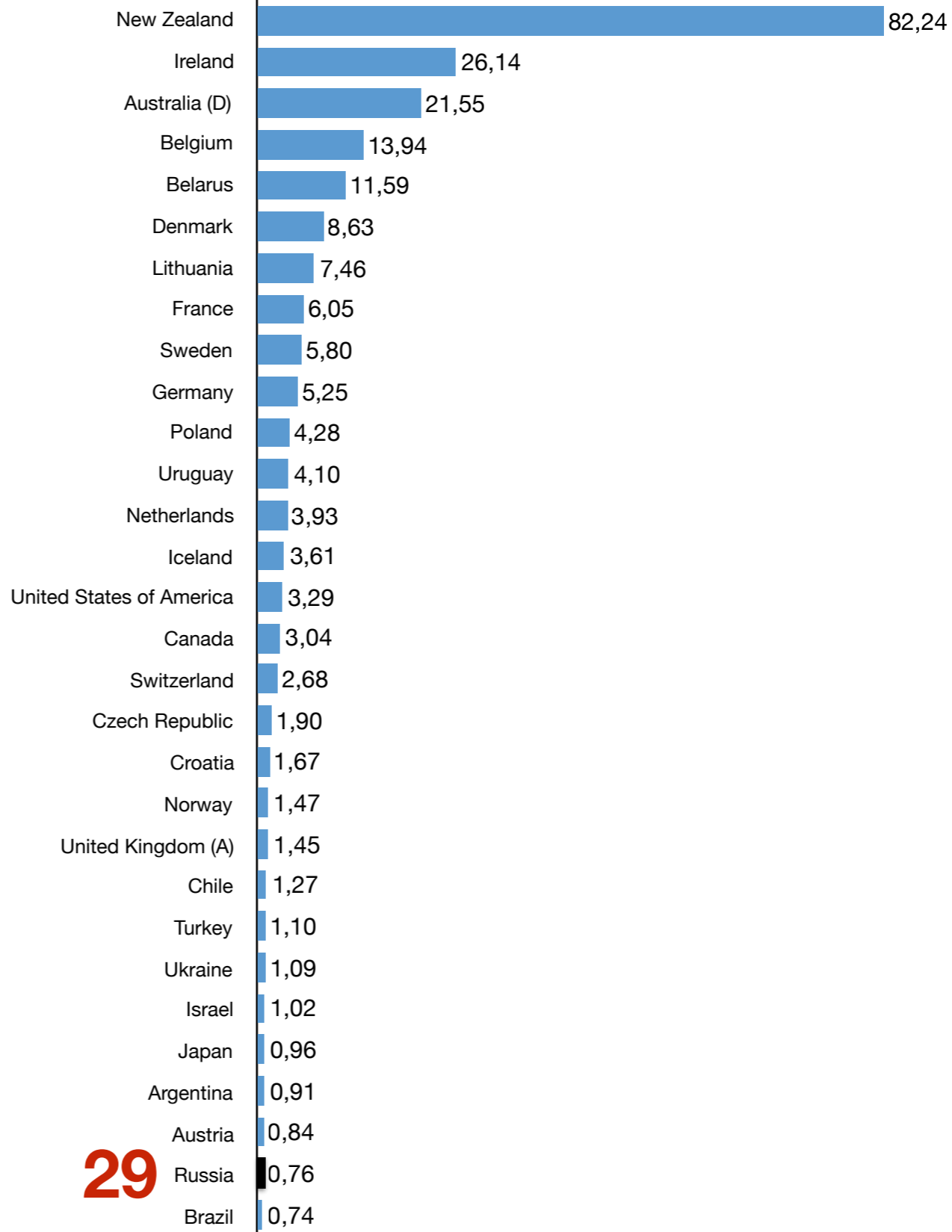


SMP PRODUCTION

TOTAL



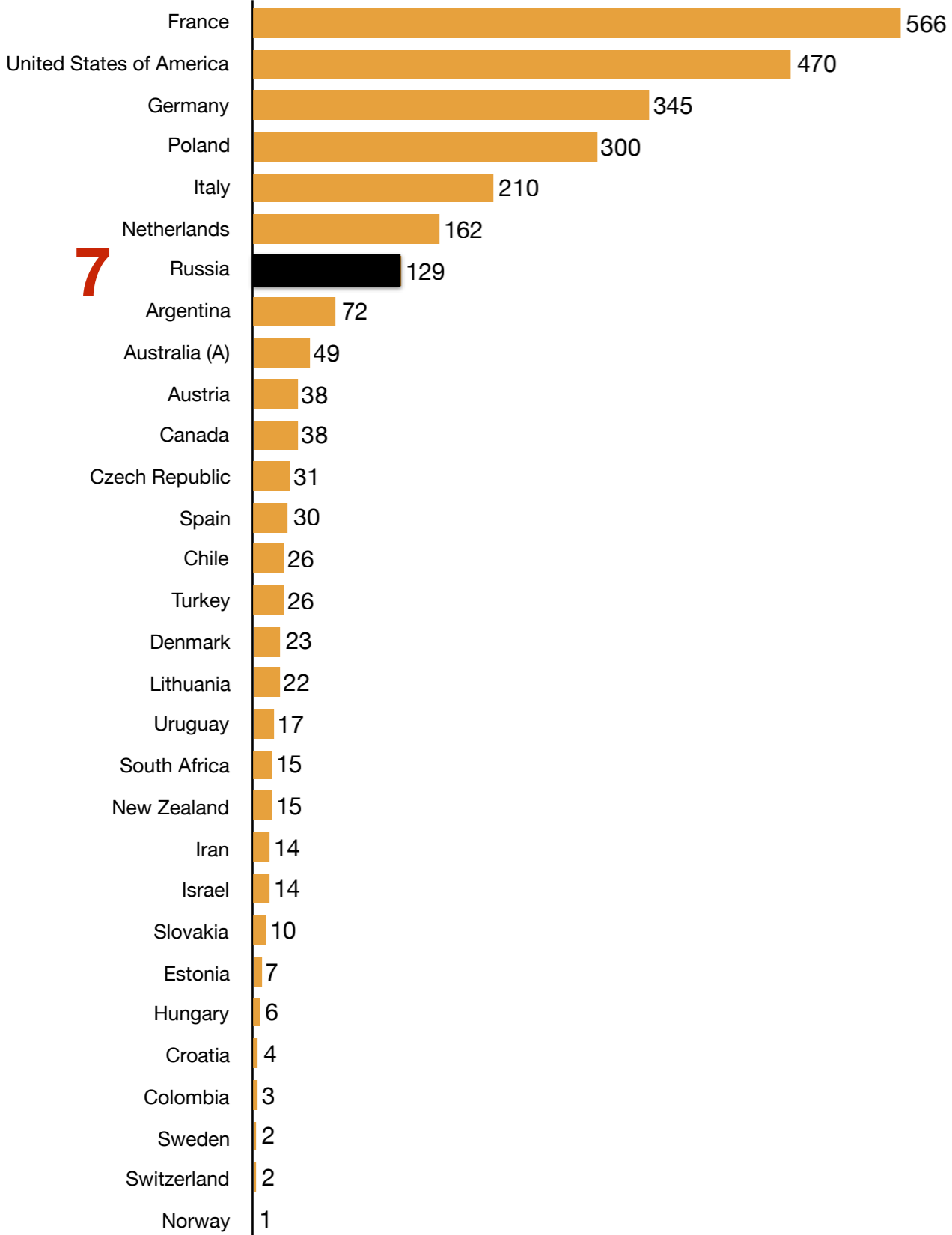
PER CAPITA



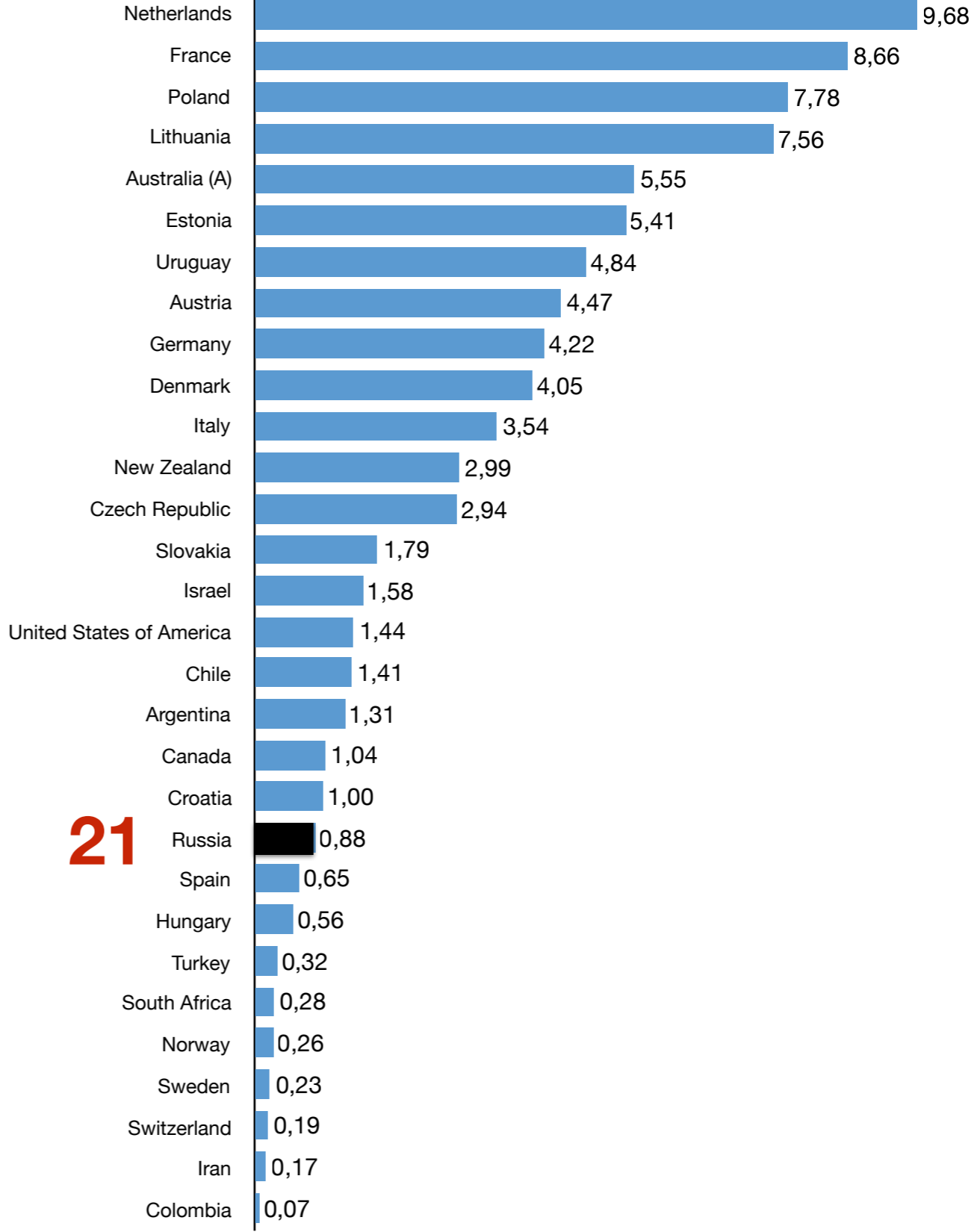


WHEY POWDER PRODUCTION

TOTAL



PER CAPITA



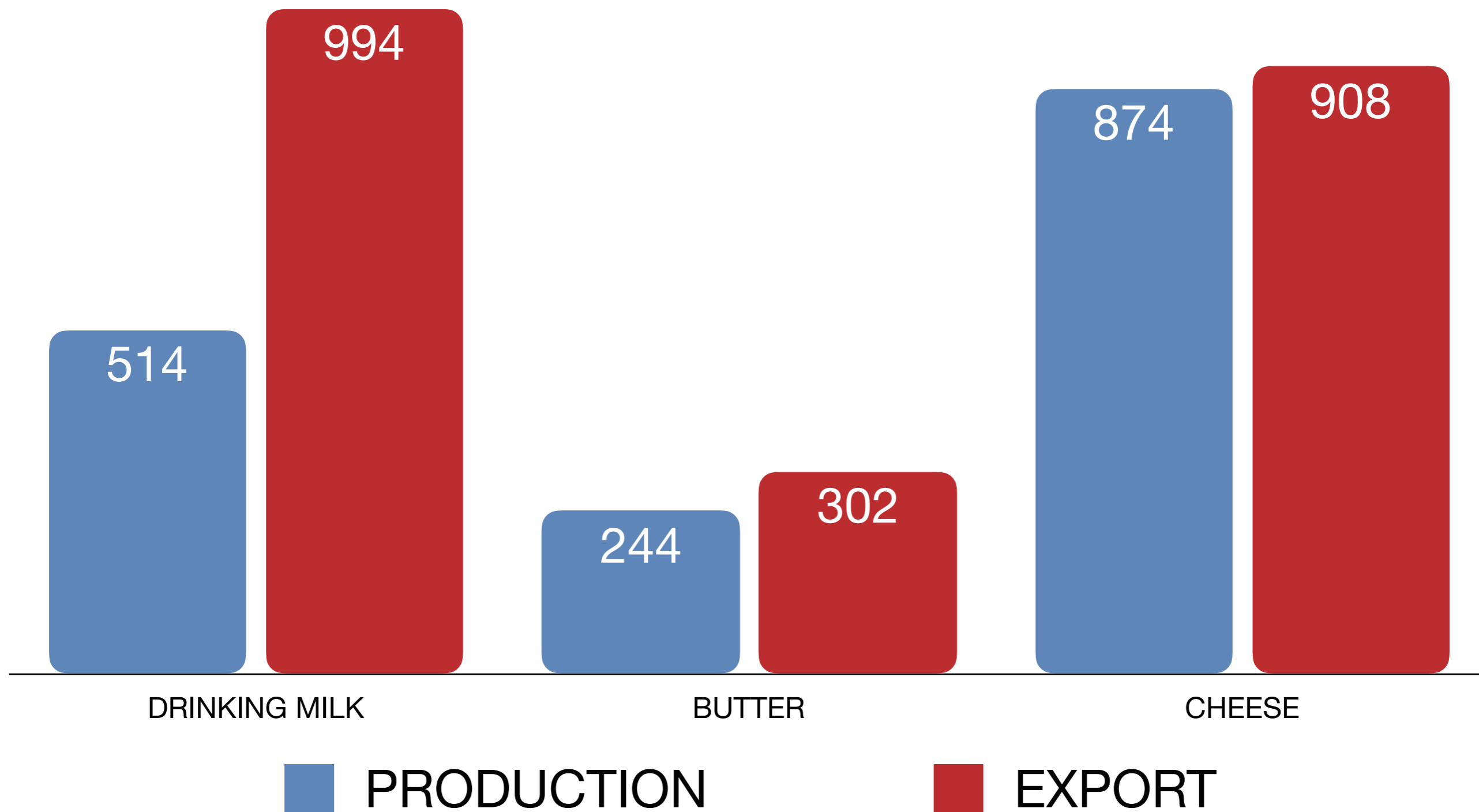


WHY DOES RUSSIA THINK ABOUT EXPORT?



WHY DOES RUSSIA THINK ABOUT EXPORT?

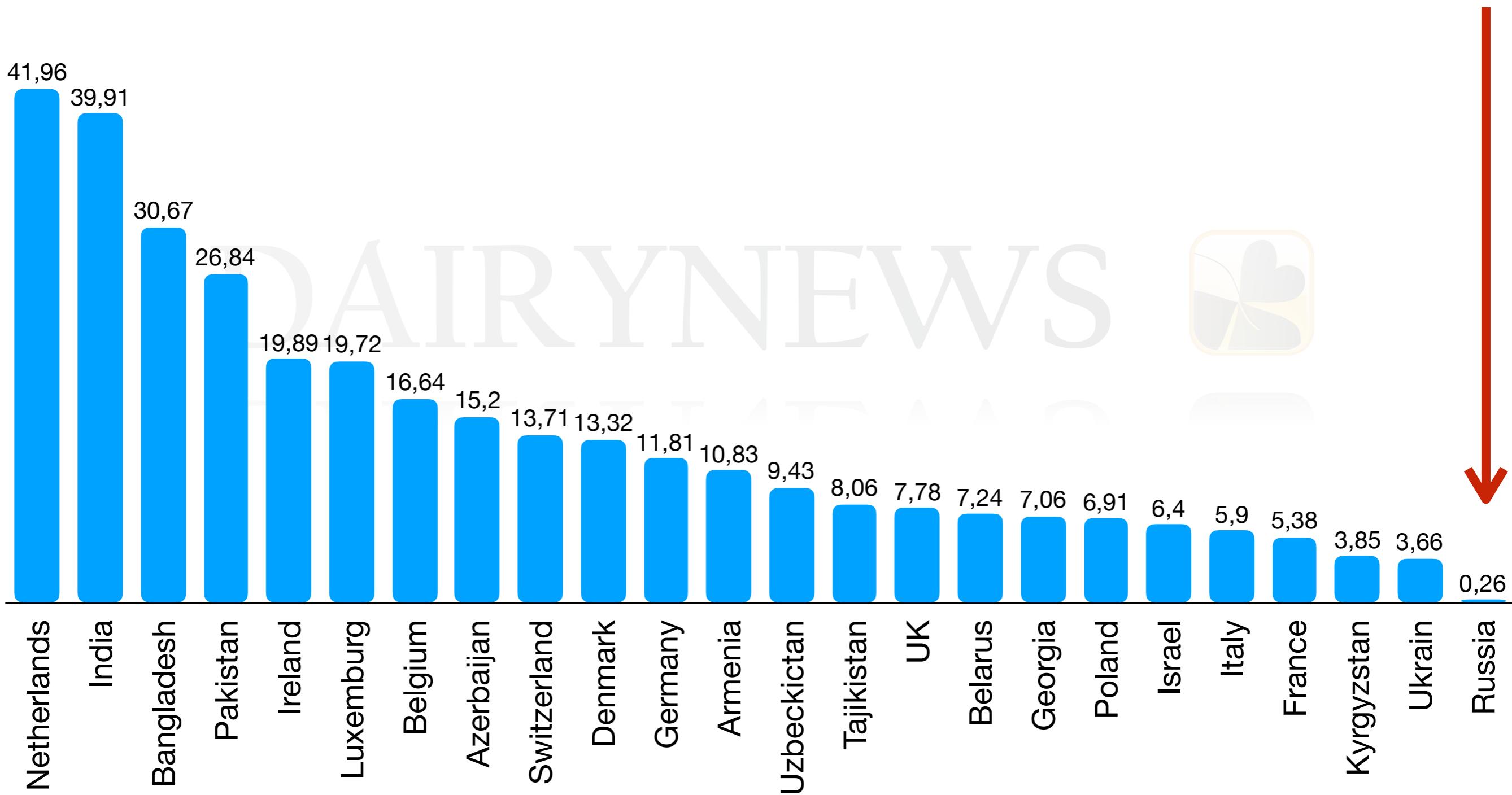
NETHERLANDS IS THE EXAMPLE OF RE-EXPORTER





WHY DOES RUSSIA THINK ABOUT EXPORT?

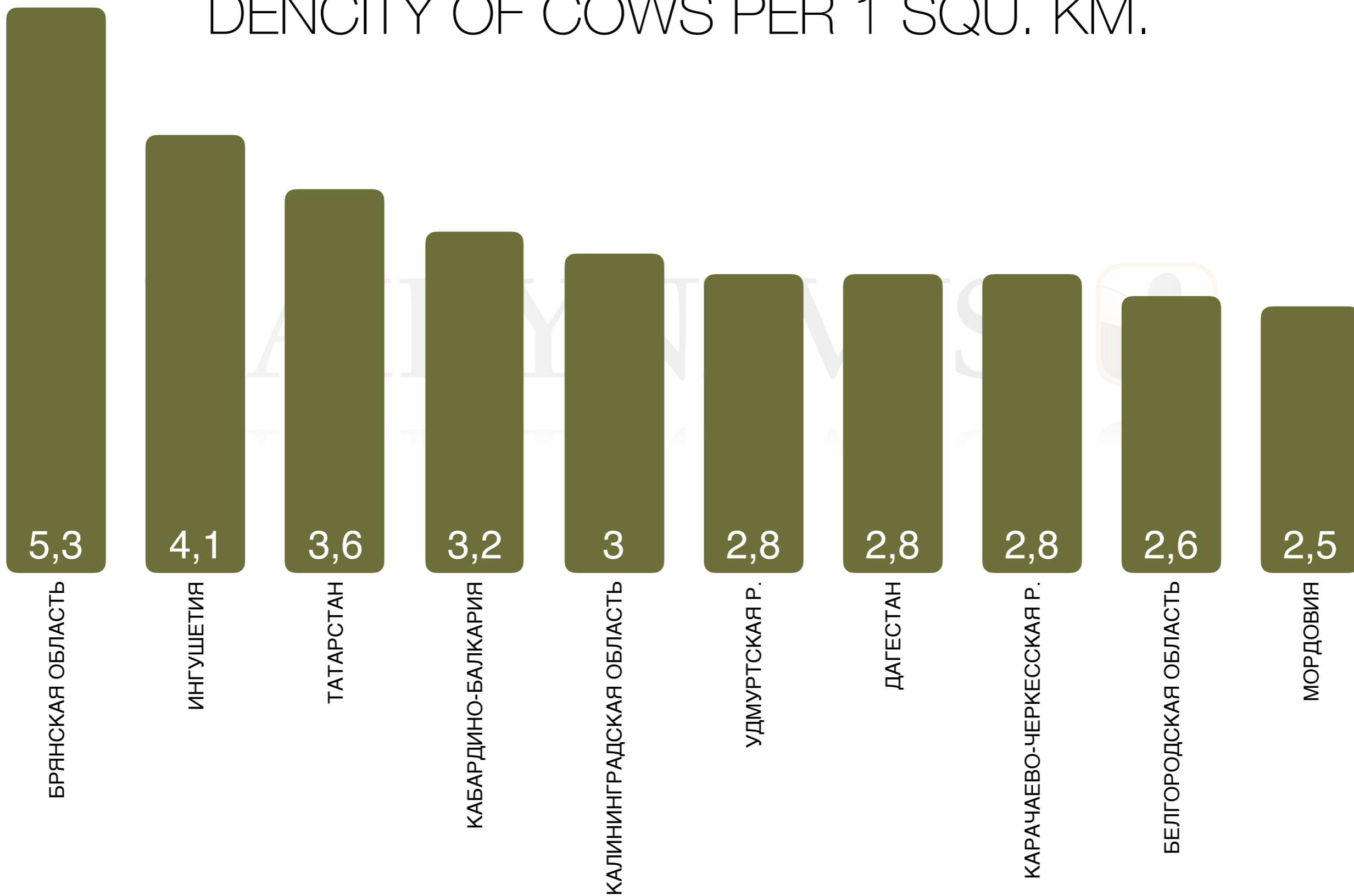
DENSITY OF COWS PER 1 SQU. KM.

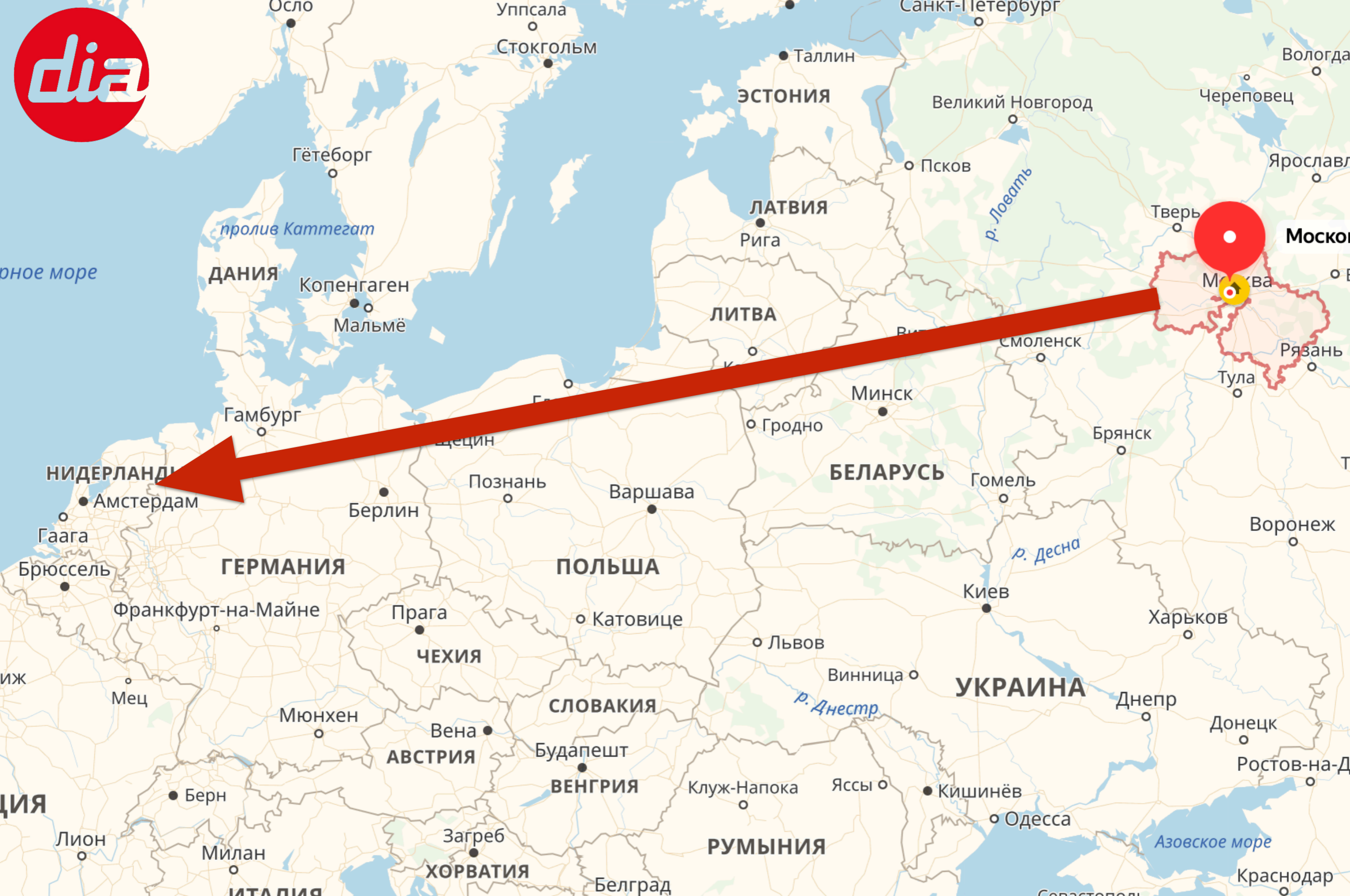




WHY DOES RUSSIA THINK ABOUT EXPORT?

DENCITY OF COWS PER 1 SQU. KM.





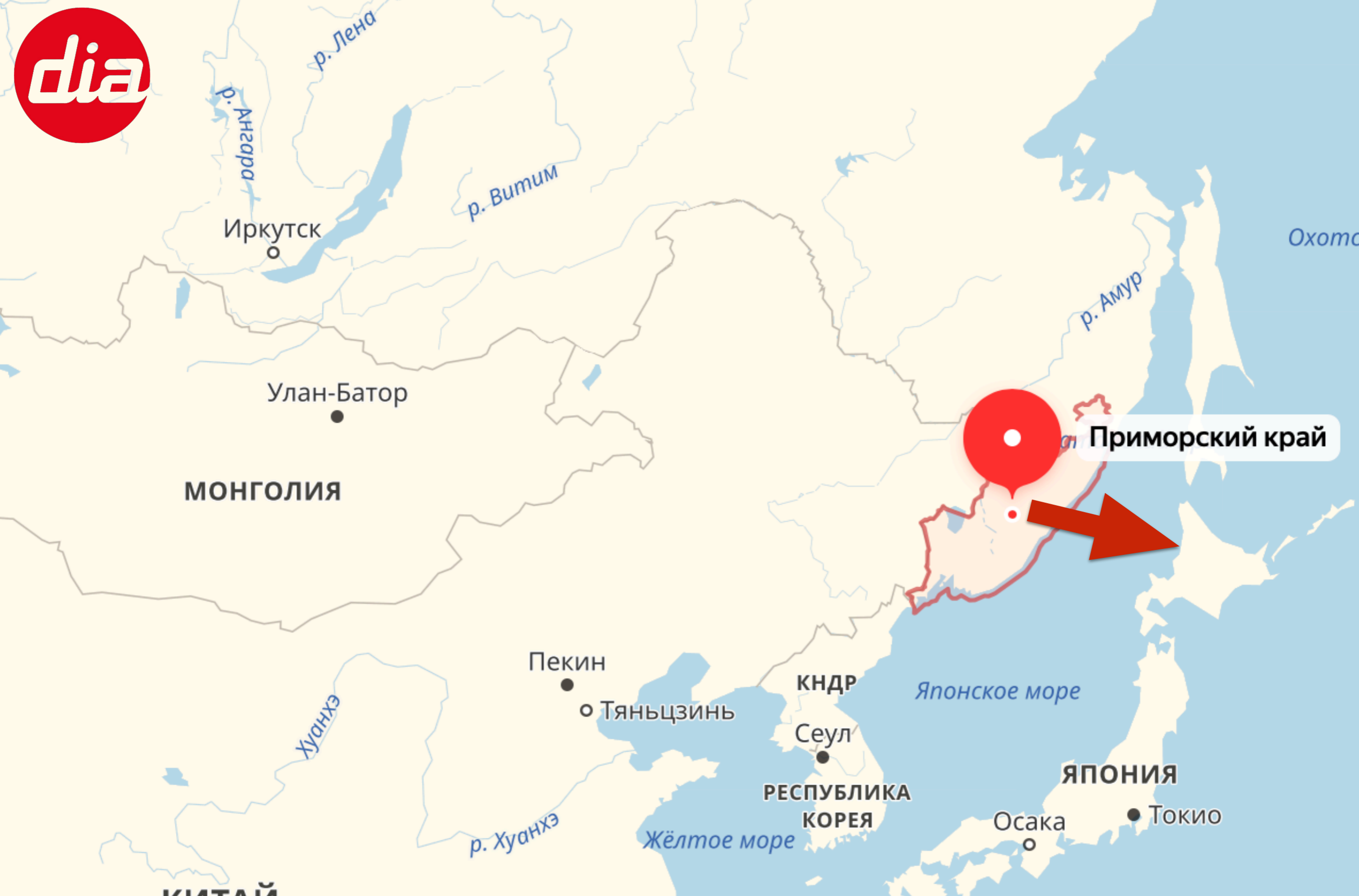


MOSCOW REG.



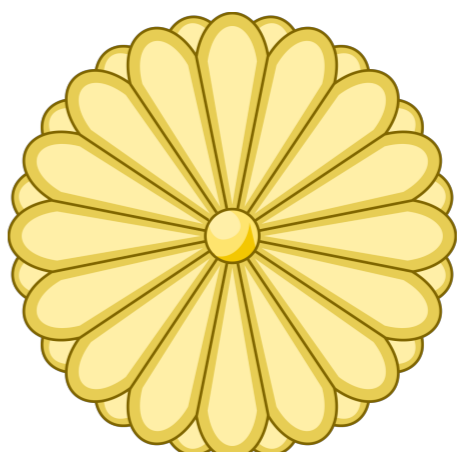
NETHERLANDS

AREA	46 890	41 543
POPULATION	20 009 853	17 208 088
DENSITY	426,74	414,22
AMOUNT OF DAIRY COWS	94 500	1 694 000
MILK PRODUCTION	624 300	14 501 000
COWS PER 1 SUQARE KM	2,02	40,78
YIELD, TONS	6,606	8,560



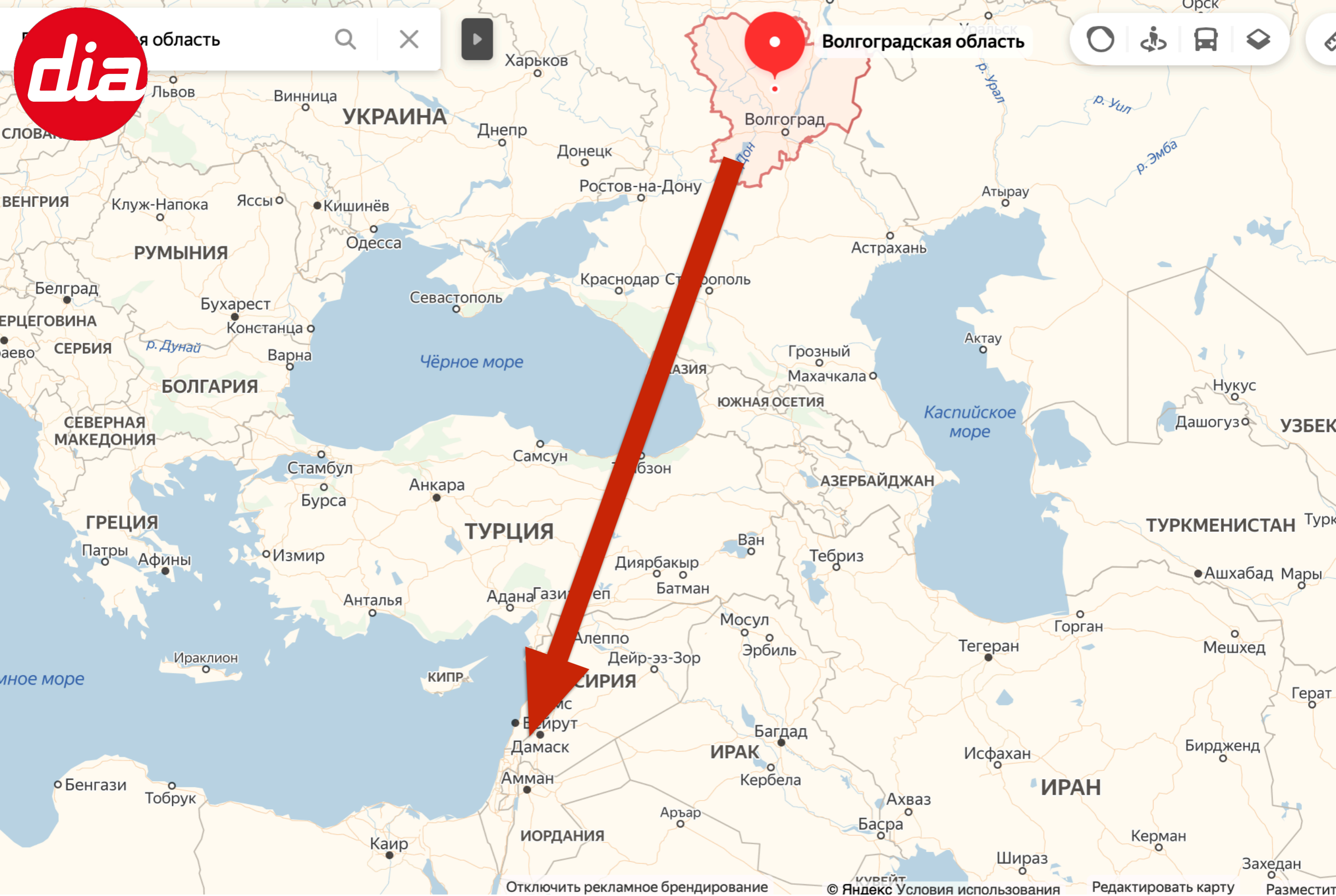


PRIMORSKIY KRAY



HOKKAIDO

AREA	164 673	83 400
POPULATION	1 902 719	5 500 000
DENSITY	11,55	65,95
DENSITY OF DAIRY COWS	15 800	852 000
MILK PRODUCTION	67 100	7 240 000
COWS PER 1 SUQARE KM	0,10	10,22
YIELD, TONS	4,247	8,498



Отключить рекламное брендрование

© Яндекс Условия использования

Редактировать карту

Разместит



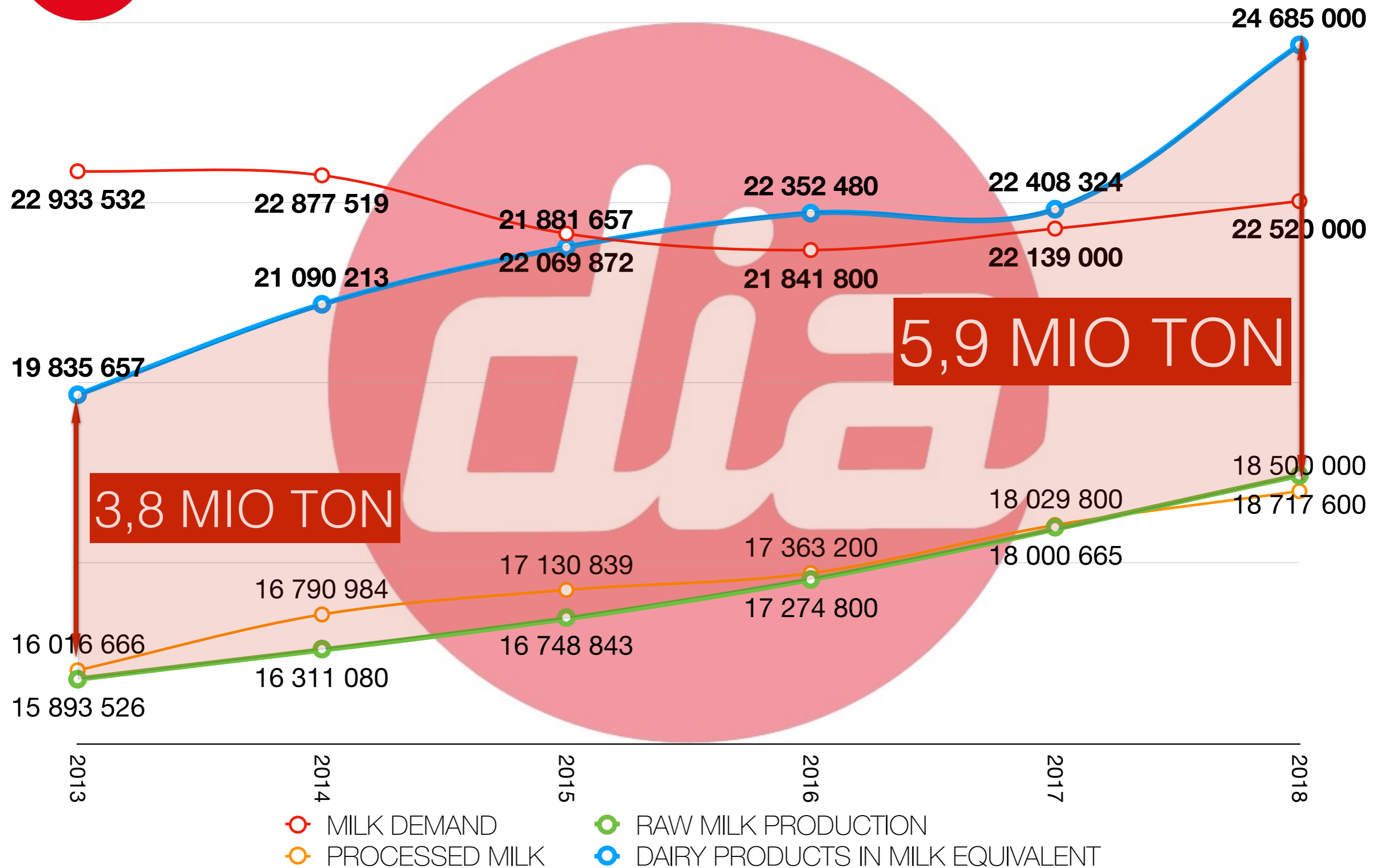
AREA	112 877	20 770
POPULATION	2 507 831	8 972 000
DENSITY	22,22	431,97
AMOUNT OF DAIRY COWS	46 800	131 000
MILK PRODUCTION	68 000	1 504 000
COWS PER 1 SUQARE KM	0,41	6,31
YIELD, TONS	1,453	11,481



SO, WHY DOES RUSSIA THINK ABOUT EXPORT?



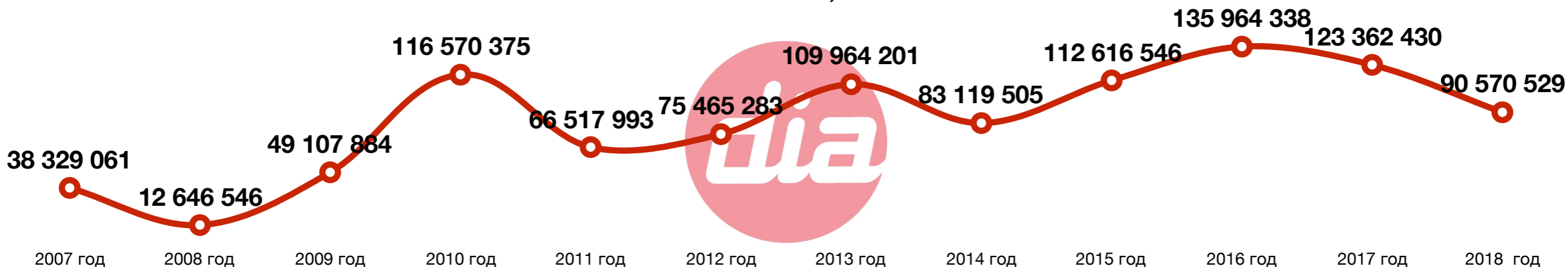
IMPORT SUBSTITUTION DIDN'T TAKE PLACE



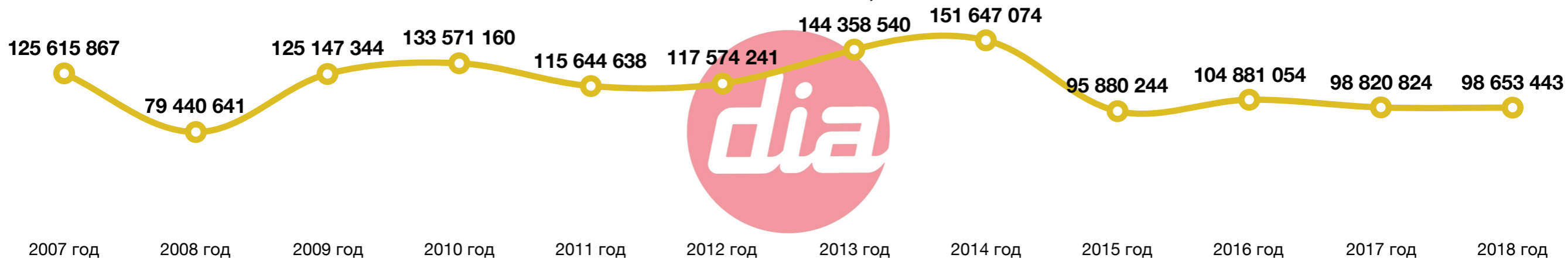


IMPORT SUBSTITUTION DIDN'T TAKE PLACE

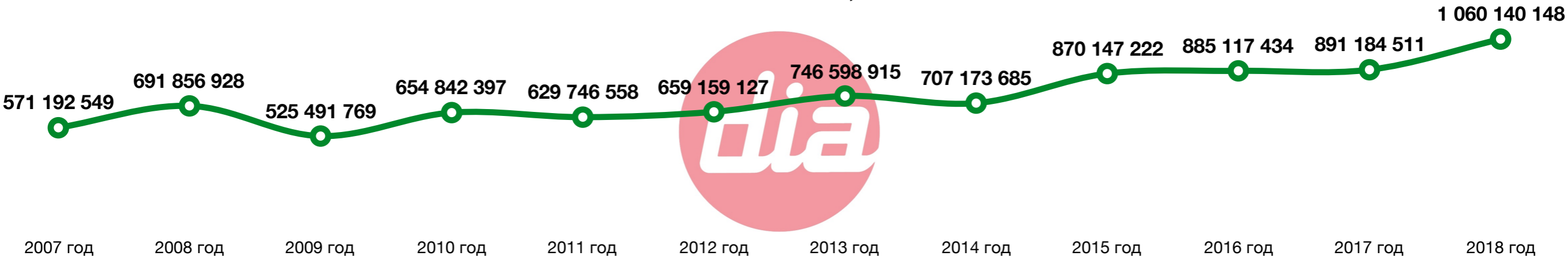
IMPORT SMP, KG



IMPORT DAIRY FATS, KG



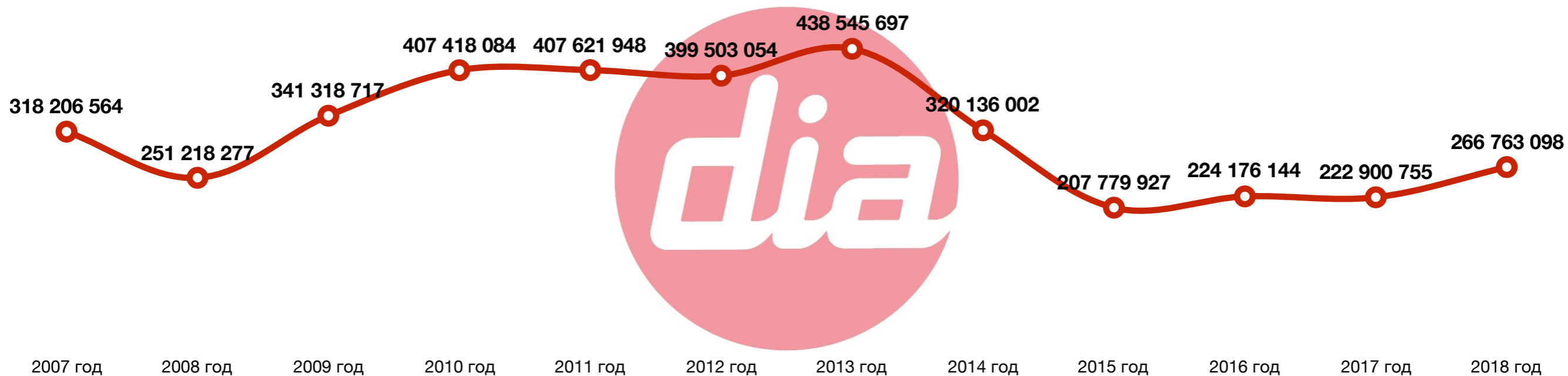
IMPORT PALM OIL, KG





IMPORT SUBSTITUTION DIDN'T TAKE PLACE

IMPORT CHEESE, KG



ANALOG CHEESE PRODUCTS IMPORT TO RUSSIA, KG

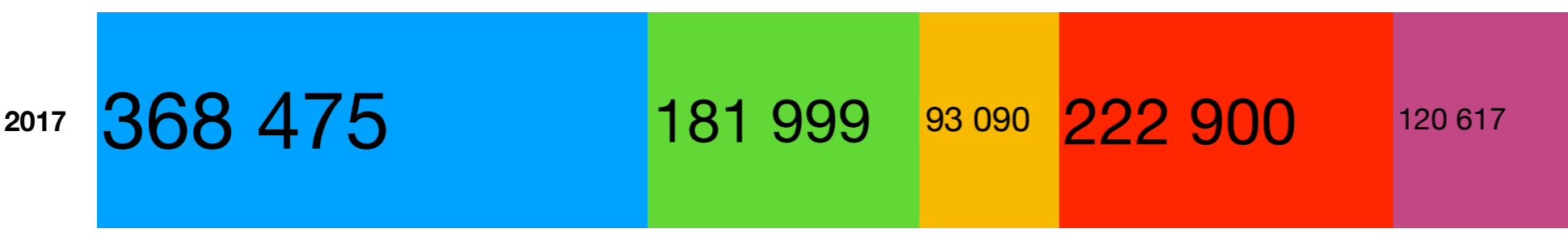




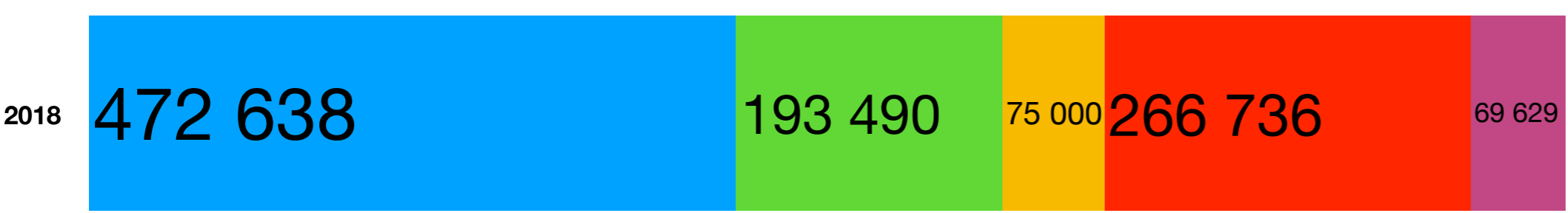
SURPLUS OF CHEESE



TOTAL: **902 542 T**,
OR **6,15 KG. PER CAPITA**



TOTAL: **987 081 T**,
OR **6,72 KG. PER CAPITA**



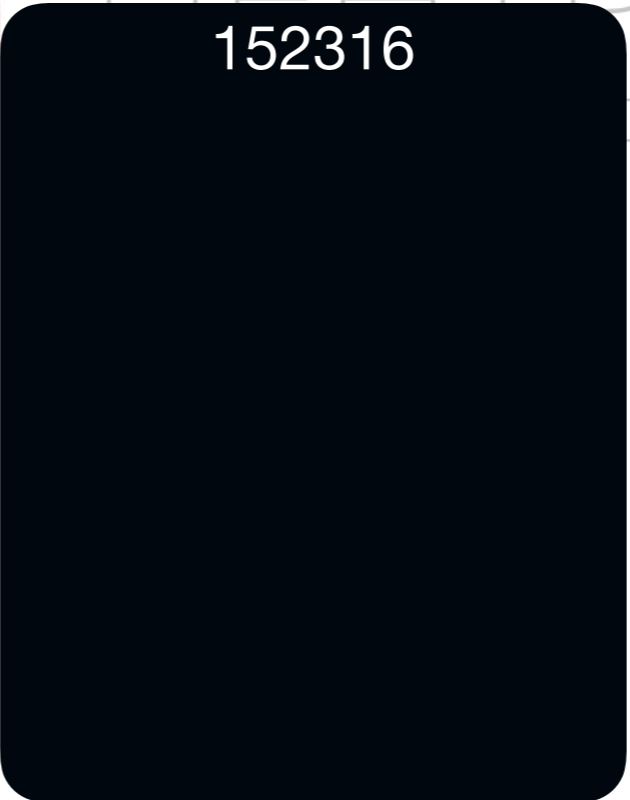
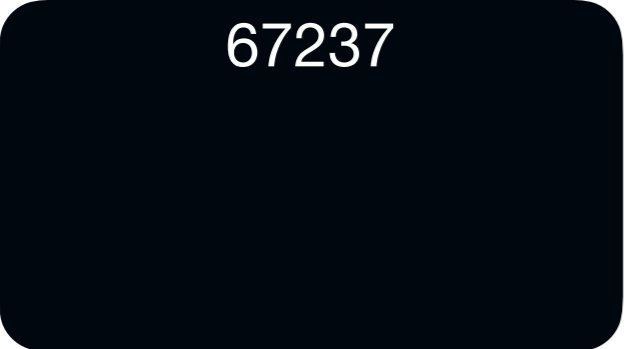
TOTAL: **1 077 493 T**,
OR **7,34 KG. PER CAPITA**

- NATURAL CHEESE
- CHEESE WITH FAT SUBSTITUTION
- PROCESSED CHEESE
- IMPORTED CHEESE
- IMPORT OF ANALOG



CHEESE SURPLUS

■ EXPORT
■ SUPLUS



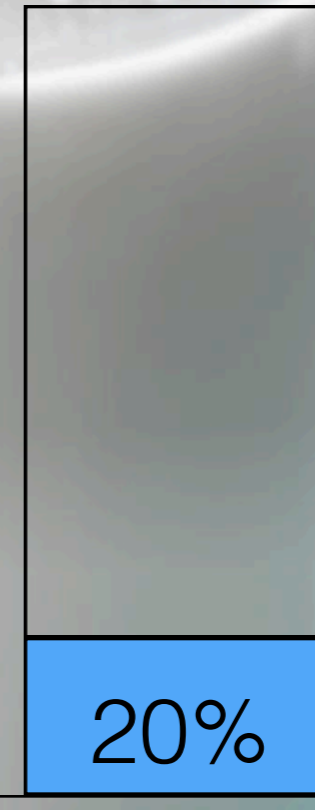
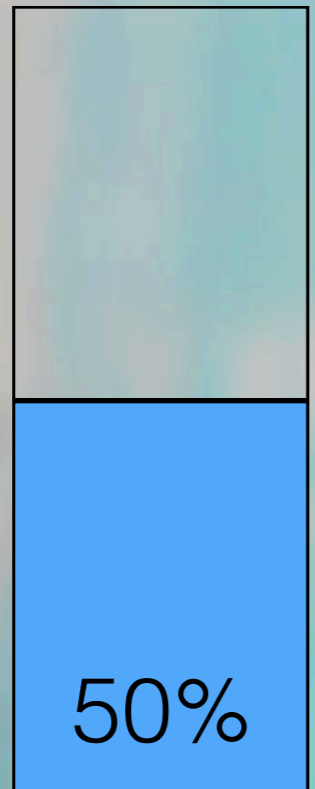
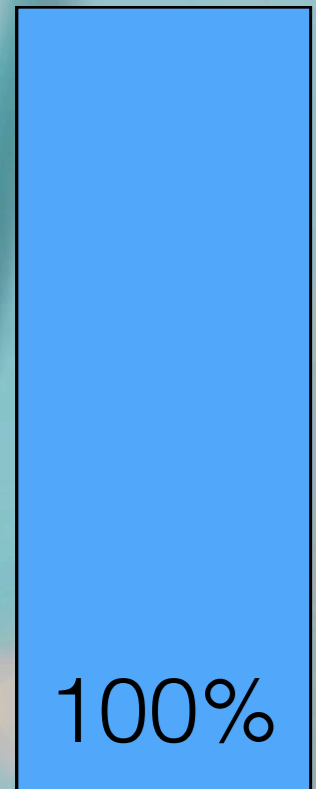


DAIRY
PRODUCTS

DAIRY
COMPOUND
PRODUCTS

MILK-CONTAINING
PRODUCTS

MILK-CONTAINING
PRODUCTS
WITH DAIRY FAT
SUBSTITUTION



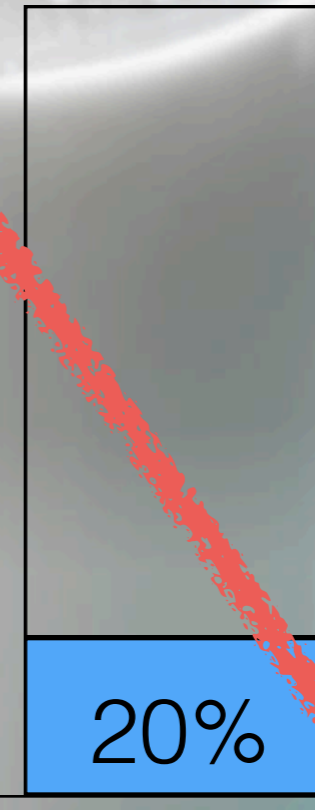
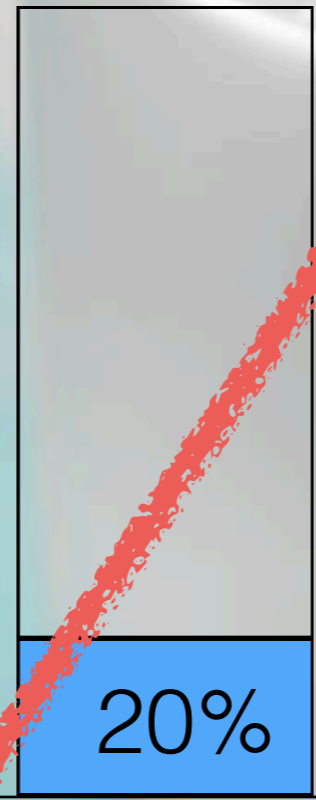
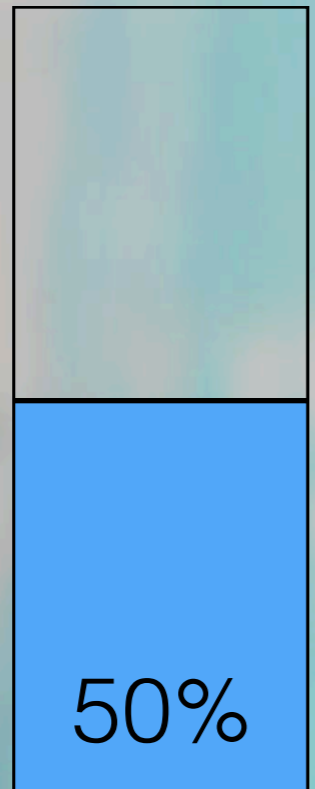
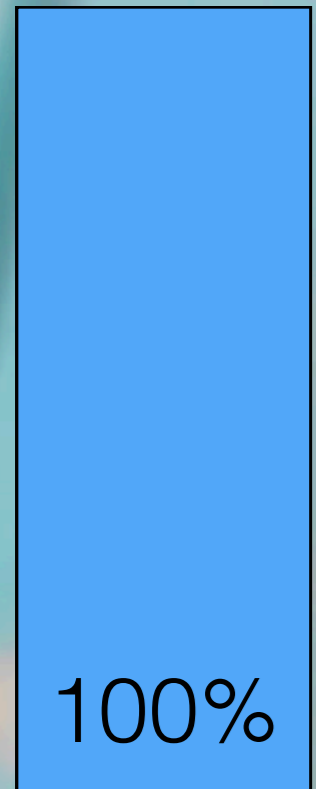


DAIRY PRODUCTS

DAIRY COMPOUND PRODUCTS

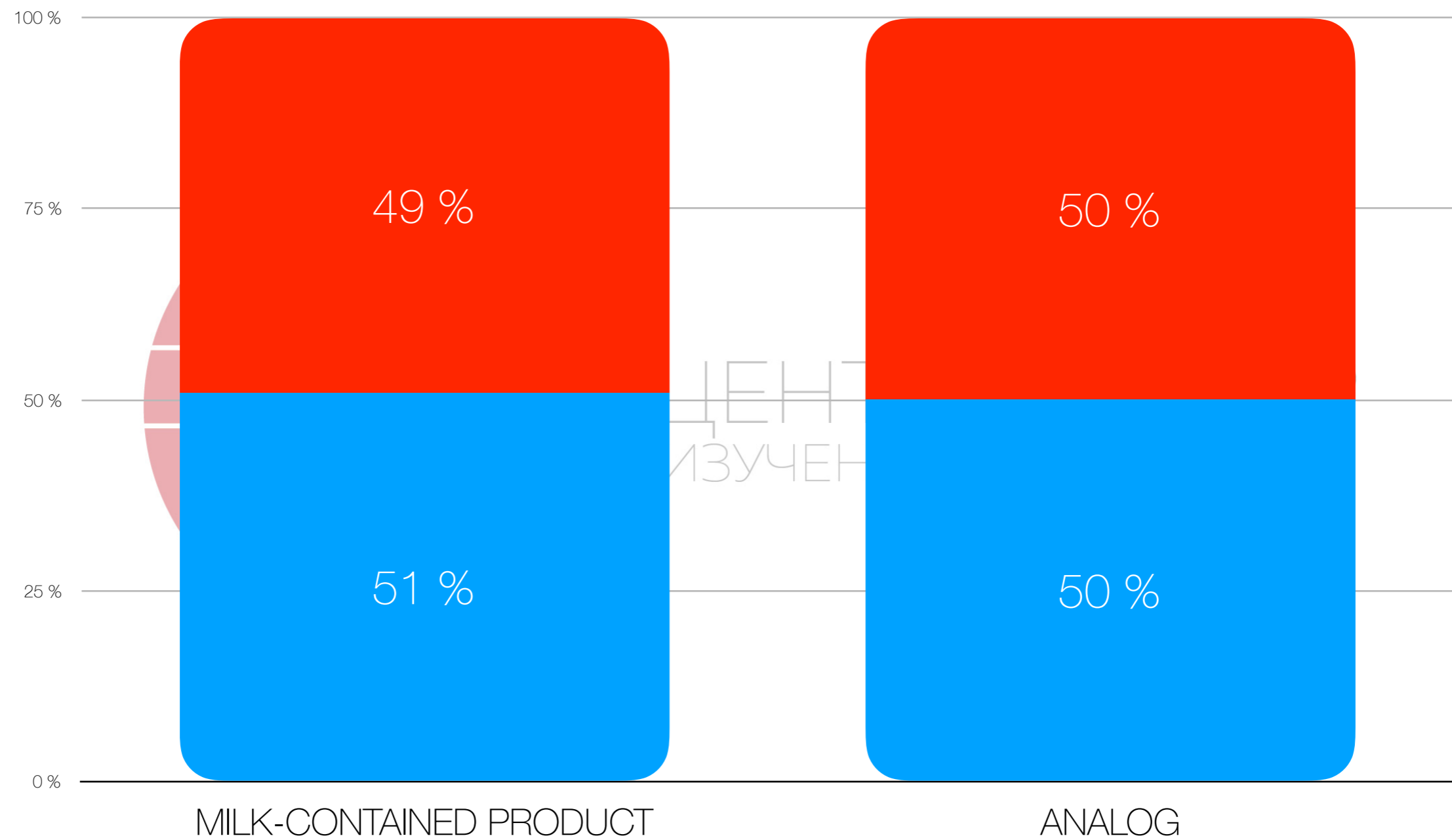
MILK-CONTAINING PRODUCTS

MILK-CONTAINING PRODUCTS WITH DAIRY FAT SUBSTITUTION





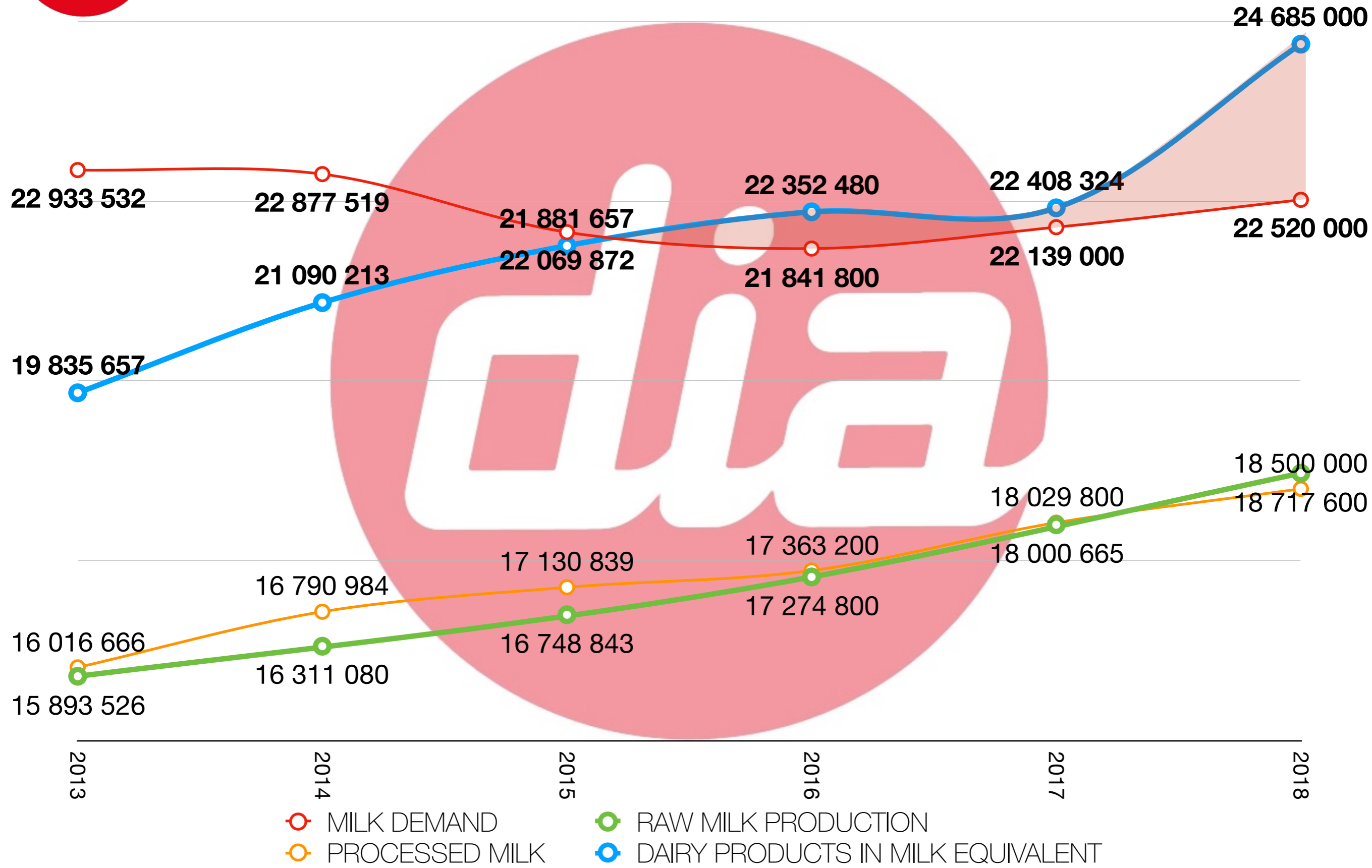
DIFFERENCE BETWEEN **MILK-CONTAINED PRODUCT** AND **ANALOG OF DAIRY PRODUCT**



■ SHARE OF PLANT FAT
■ SHARE OF DAIRY FAT

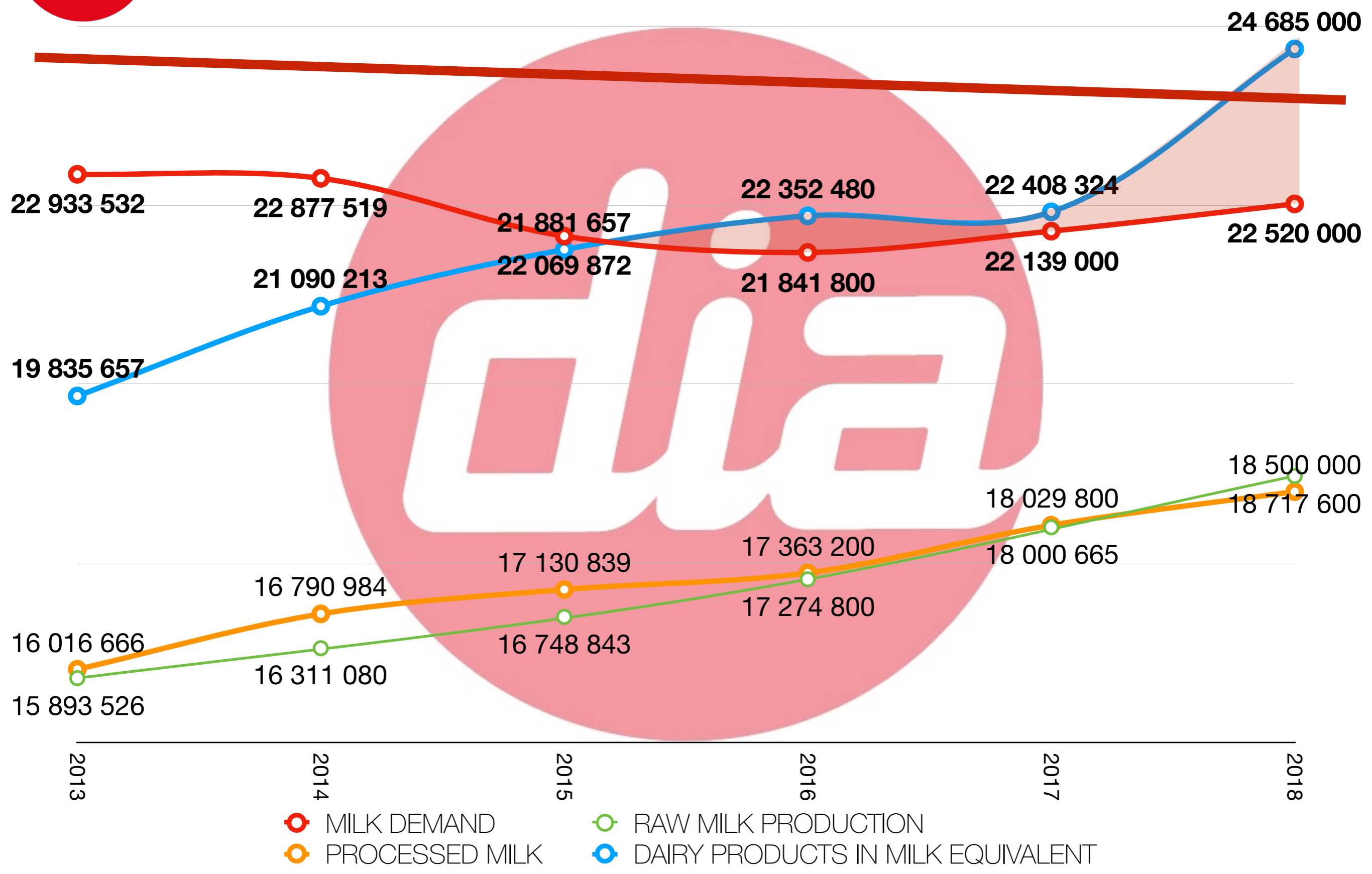


SO, WHY DOES RUSSIA THINK ABOUT EXPORT?





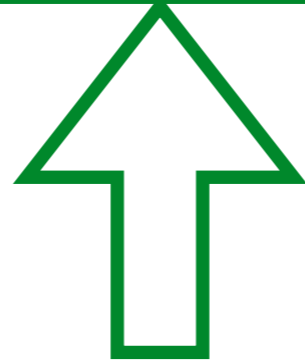
SO, WHY DOES RUSSIA THINK ABOUT EXPORT?





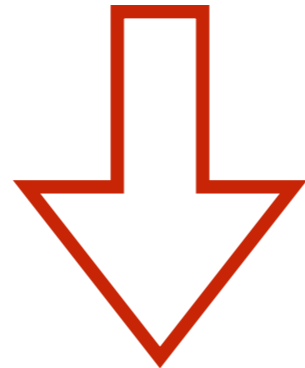
BACK TO USSR?

FOR EXPORT



BEST QUALITY

ALL THE REST



FOR DOMESTIC MARKET



SO, WHY DOES RUSSIA THINK ABOUT EXPORT?

dia BECAUSE

dia DECLINING OF POPULATION (-100 000 PEOPLE).

dia DECLINING OF DOMESTIC MARKET.

dia DECLINING EFFECTIVE DEMAND.

dia INCREASING OF TAXES (ESP. VAT FROM 18 TO 20%).



POTENTIAL EXPORT DIRECTIONS




ЧТО ДЕЛАЕТ ЕВРОПЕЙСКИЙ СОЮЗ?

eda european dairy association

Trade for All - 16 October 2018 - IDF | 14

“By 2025, the EU will have FTAs with all countries of this world, but three....”





ЧТО ДЕЛАЕТ НОВАЯ ЗЕЛАНДИЯ?

NZ market access pipeline.

FTAs or EPAs concluded with:

- Australia (1983) Singapore (2001) P4-Singapore, Chile, Brunei Darussalam (2005) Thailand (2005) China (2008) ASEAN & Australia (2010) Malaysia (2010) Hong Kong (2011) Chinese Taipei (2013) Korea (2015), Pacific Islands Pacer Plus (2017)

Negotiations concluded, awaiting ratification:

- **Immediate priority - CPTPP**, Gulf Cooperation Council (Kuwait, Oman, UAE, Bahrain, Qatar, Saudi Arabia,)

Negotiating with:

- Europe, Pacific Alliance, RCEP (Japan, India, Korea, China, Australia, ASEAN), India.

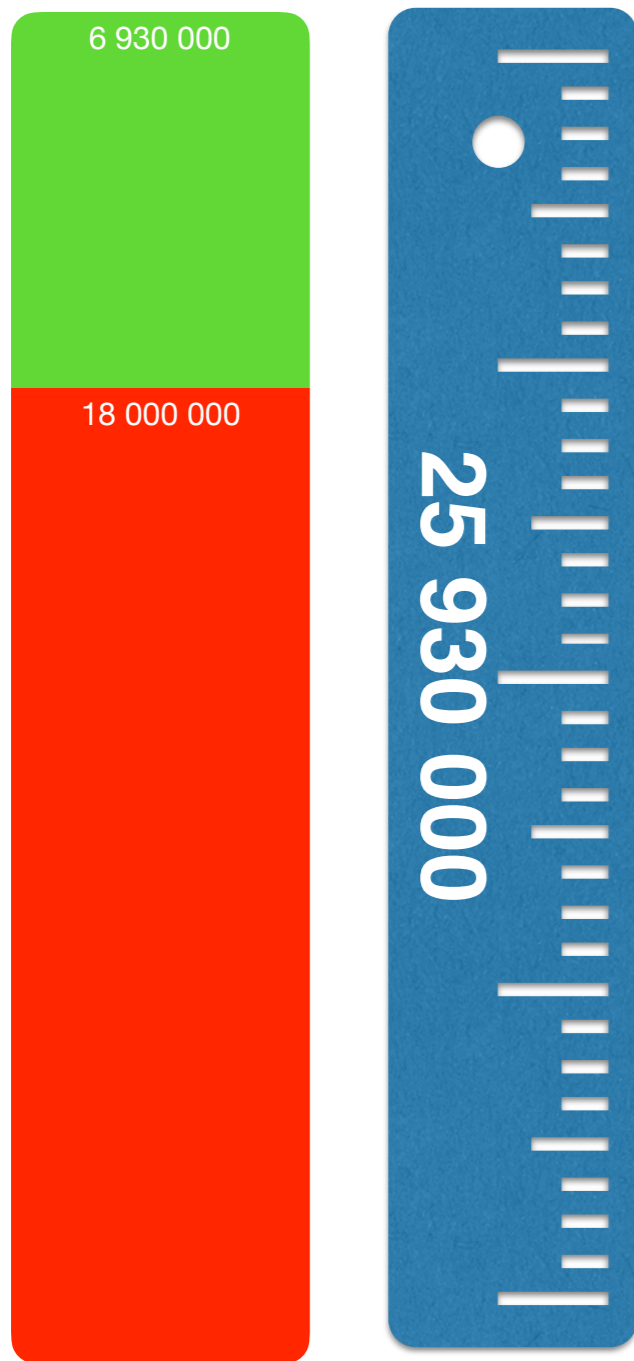
Future priorities:

- UK (following Brexit), Mercosur.



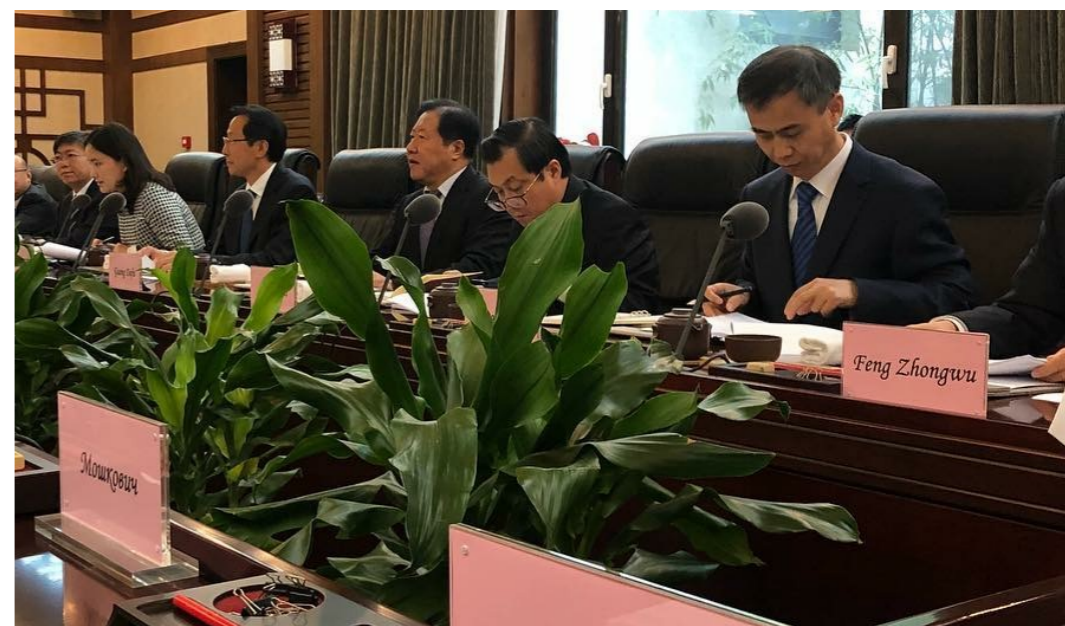


RUSSIA AND BELARUS IN CHINA



■ RUSSIA

■ BELARUS



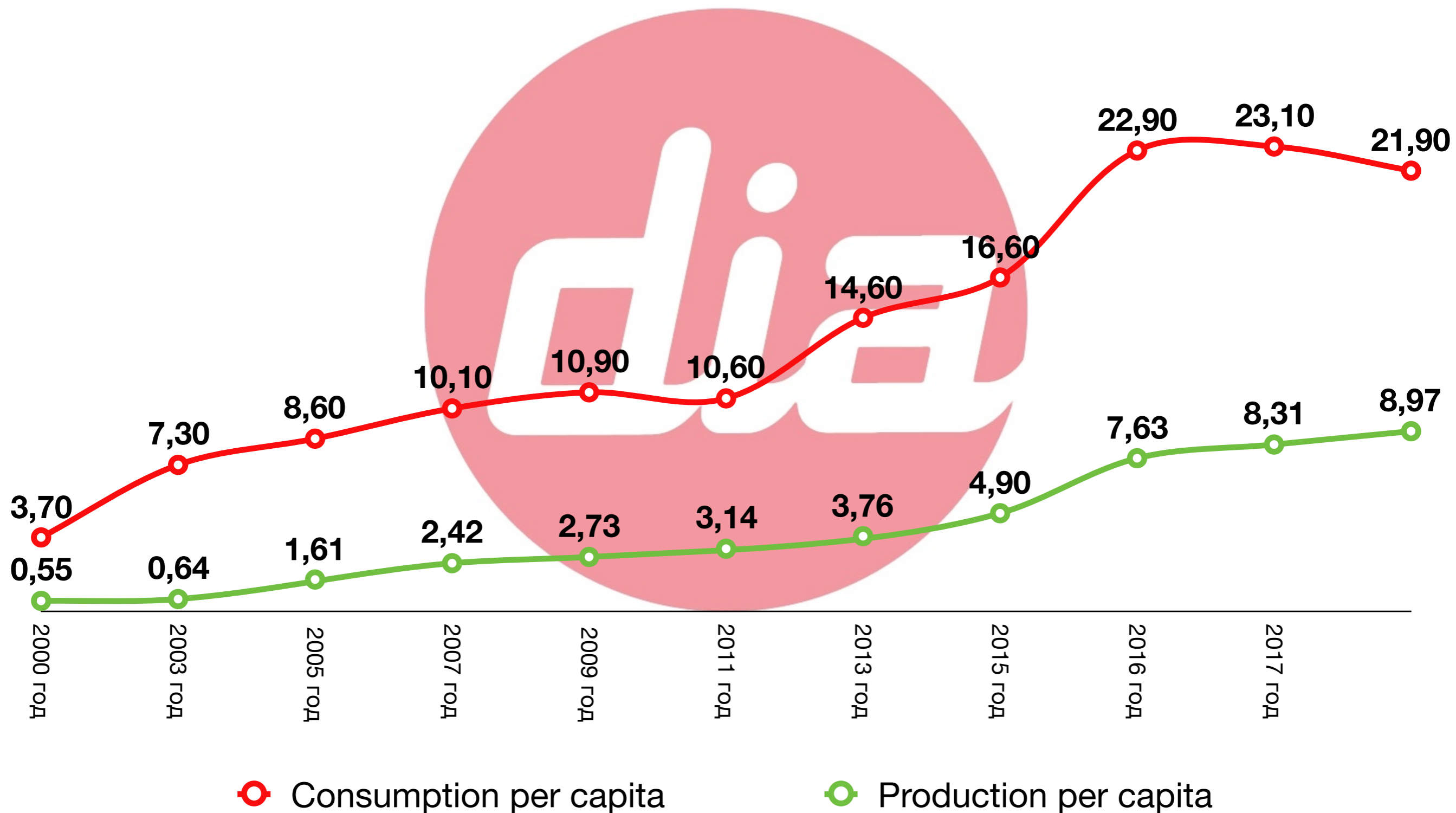


VIETNAM

ЦЕНТР | МОЛОЧНОГО
ИЗУЧЕНИЯ | РЫНКА



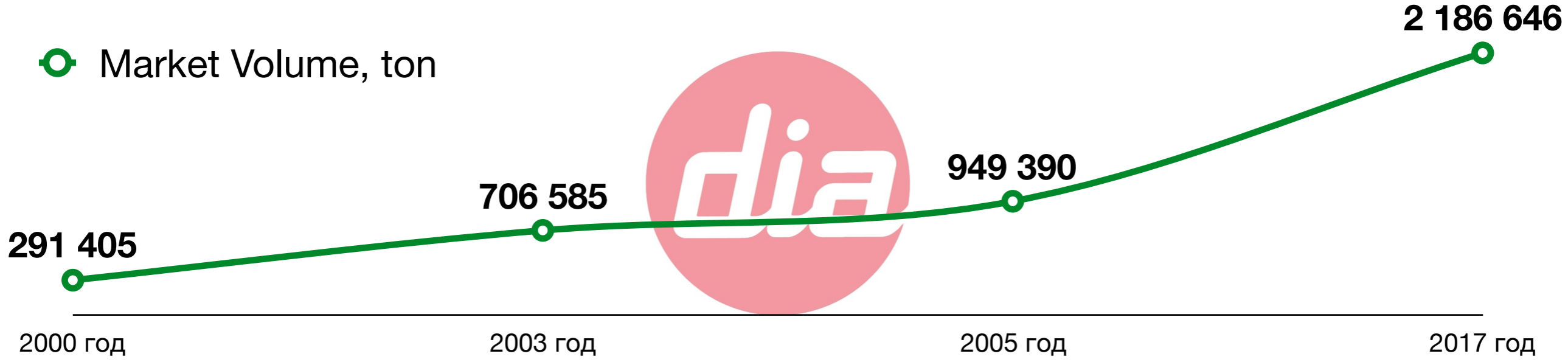
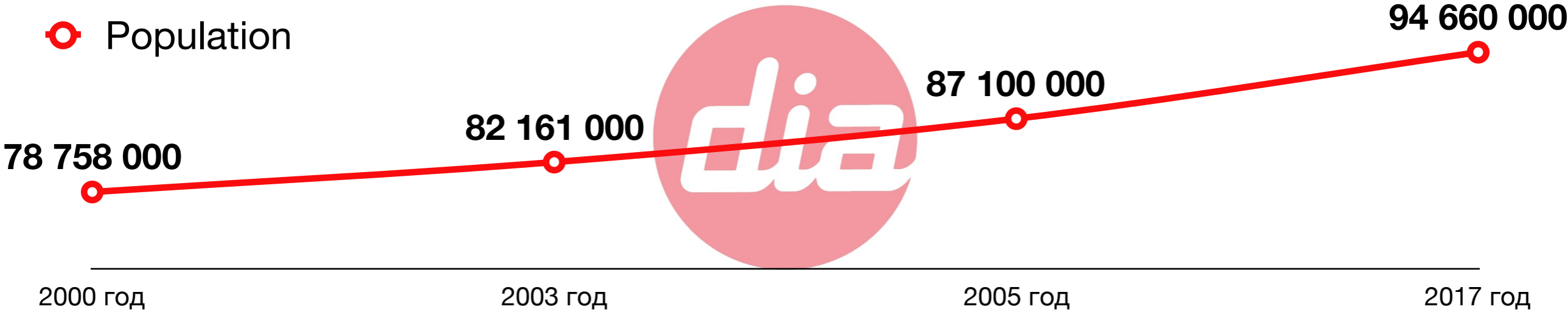
VIETNAM



SOURCE: IFCN, RDRC



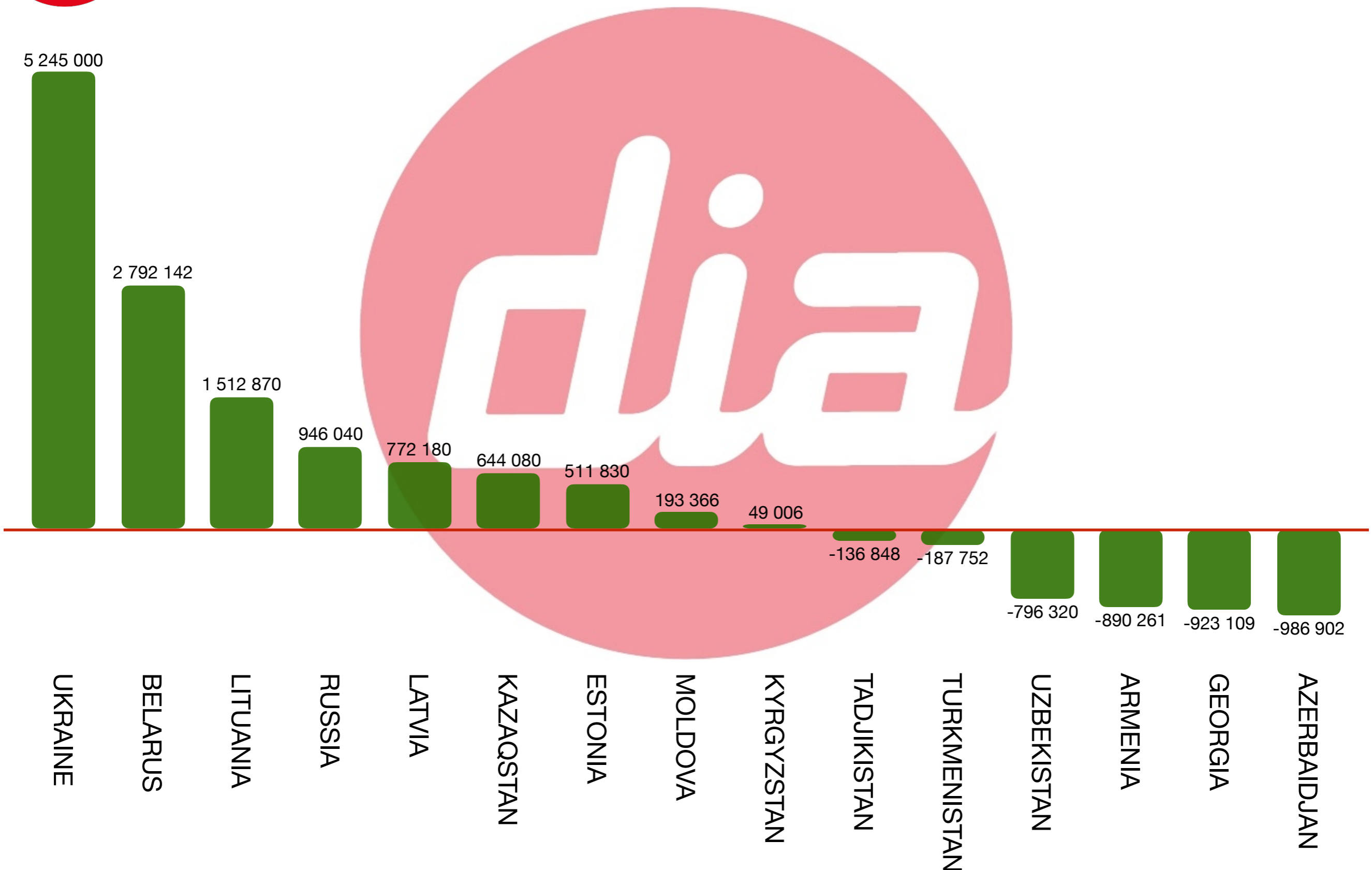
VIETNAM



SOURCE: IFCN, RDRC



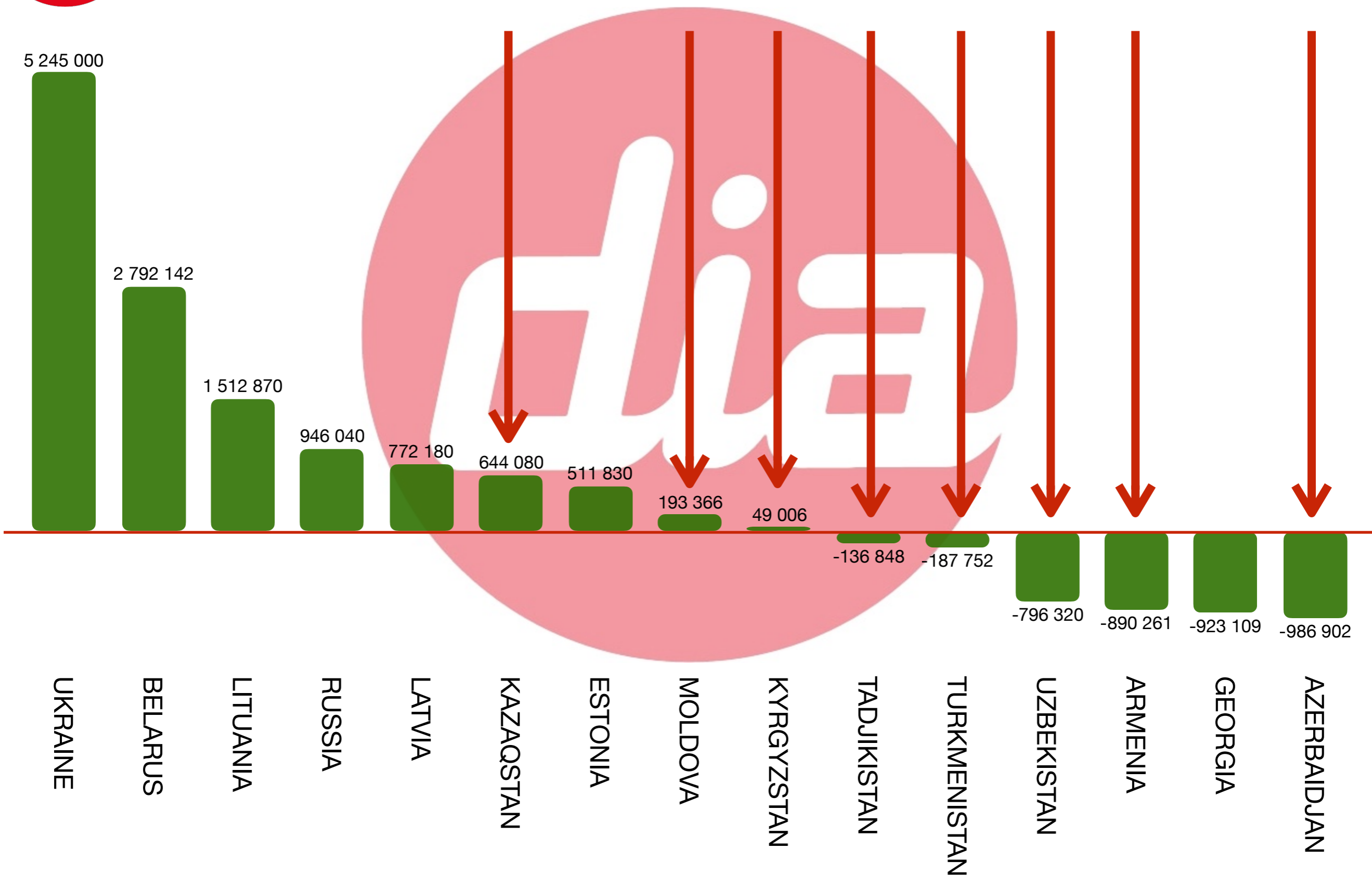
DAIRY BALANCE IN USSR



SOURCE: DIA



DAIRY BALANCE IN USSR

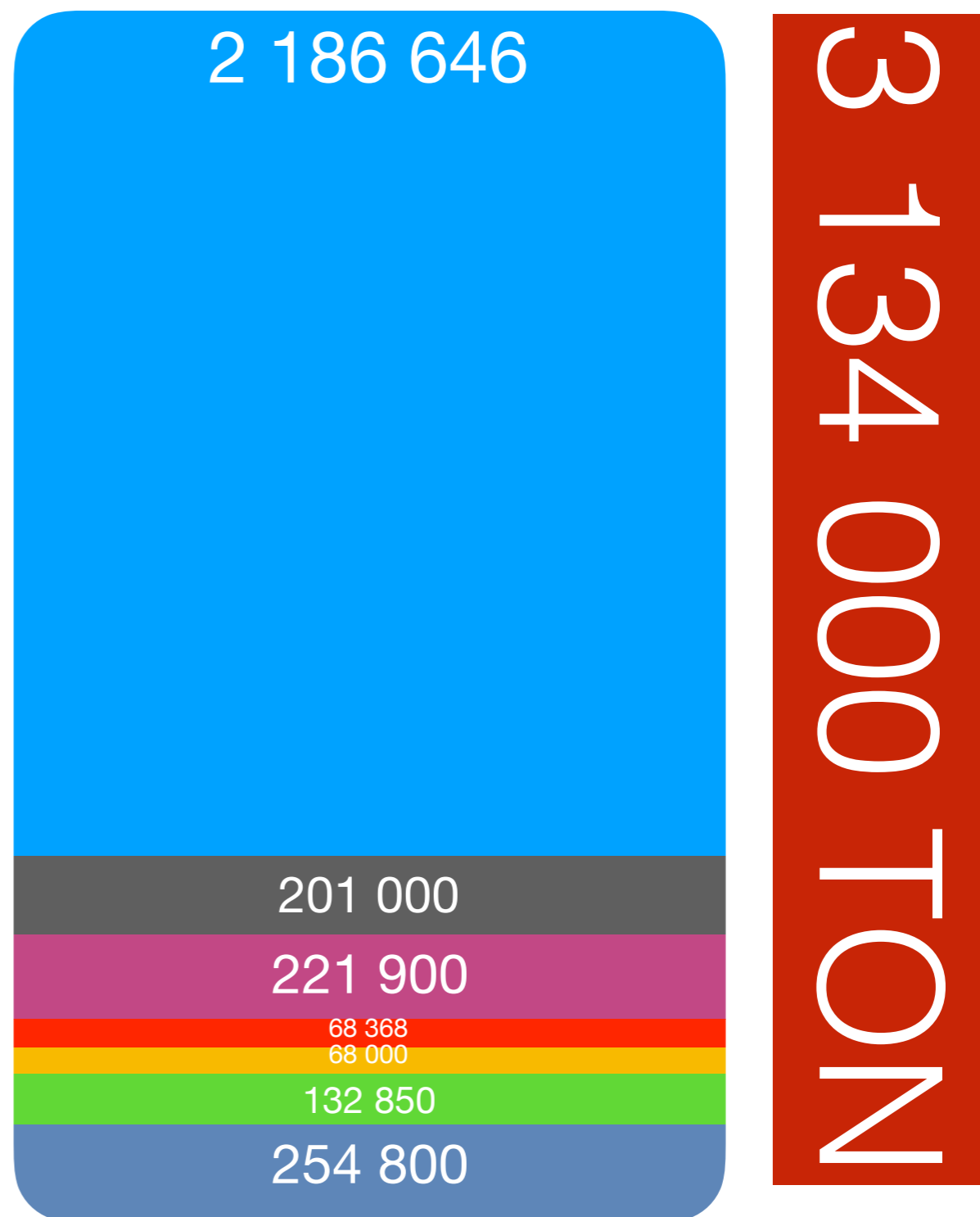


SOURCE: DIA



DAIRY BALANCE IN USSR

- VIETNAM
- ARMENIA
- UZBEKISTAN
- TAJIKISTAN
- KYRGYZSTAN
- MOLDOVA
- KAZAKHSTAN





RESUME

dia FIRST RUSSIA NEEDS TO DEVELOP DOMESTIC CONSUMPTION

dia SECOND: DEVELOP TRADITIONAL MARKETS: IT IS EASIER AND CLOSER.

dia THE BASR GOVERNMENT SUPPORT IS GETTING OUT FROM POLITICAL ISOLATION + FTO.

dia SOLVING LOGISTIC PROBLEMS

THANK YOU

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