



RUSSIAN
DAIRY
MARKET
OVERVIEW

APEX BRASIL, 23.06.2020

MINING THE DAIRY MARKET





ESTABLISHED
SIX YEARS AGO
IN 2014

MORE THEN
7000
ENTERPRISES



TOP-100



CREATING A NET

500px





BIG DATA NOW

ARTIFICIAL INTELLIGENCE TOMORROW

BEFORE
COVID





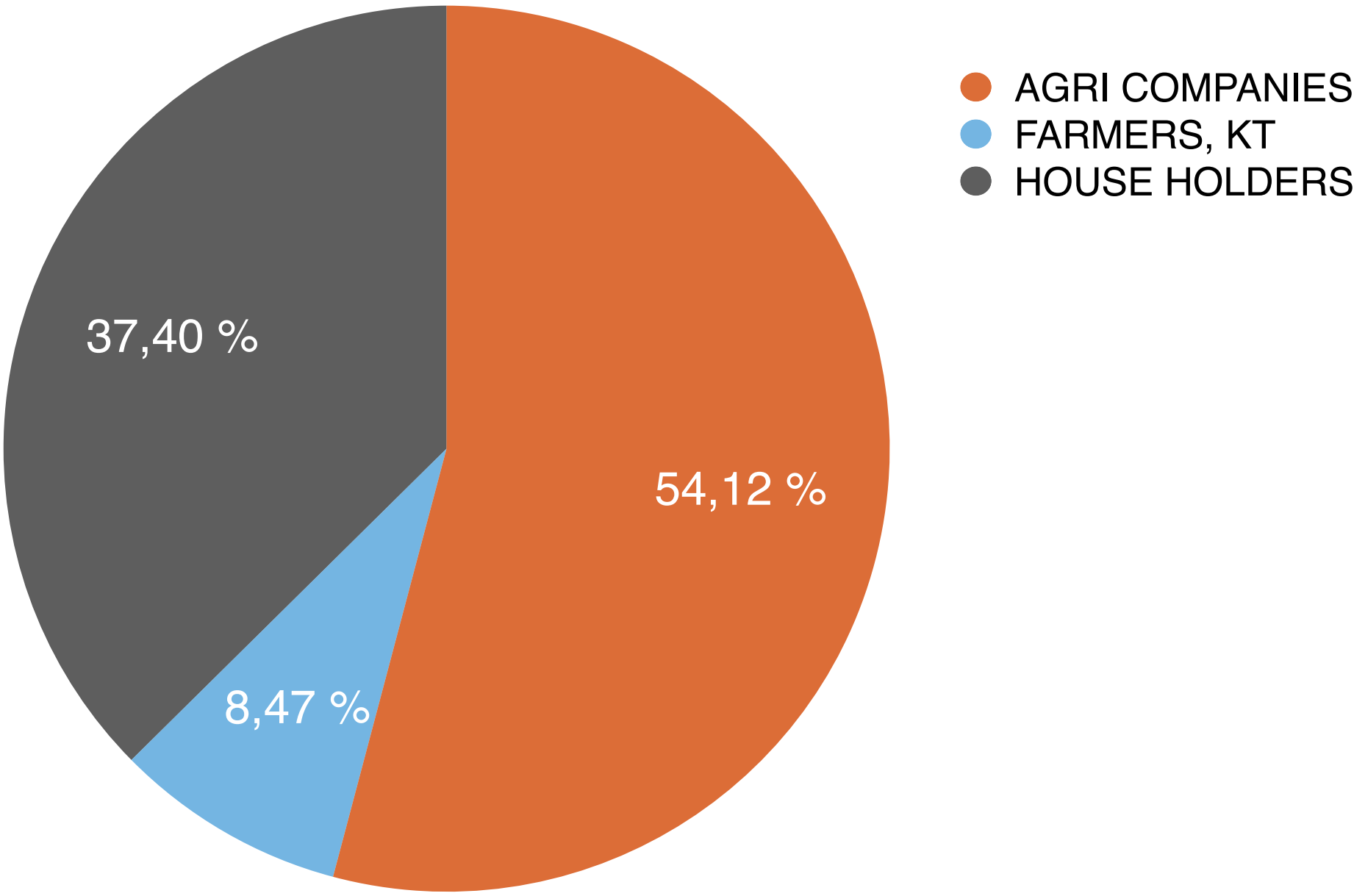
MILK

PRODUCTION



30 506,3 KT

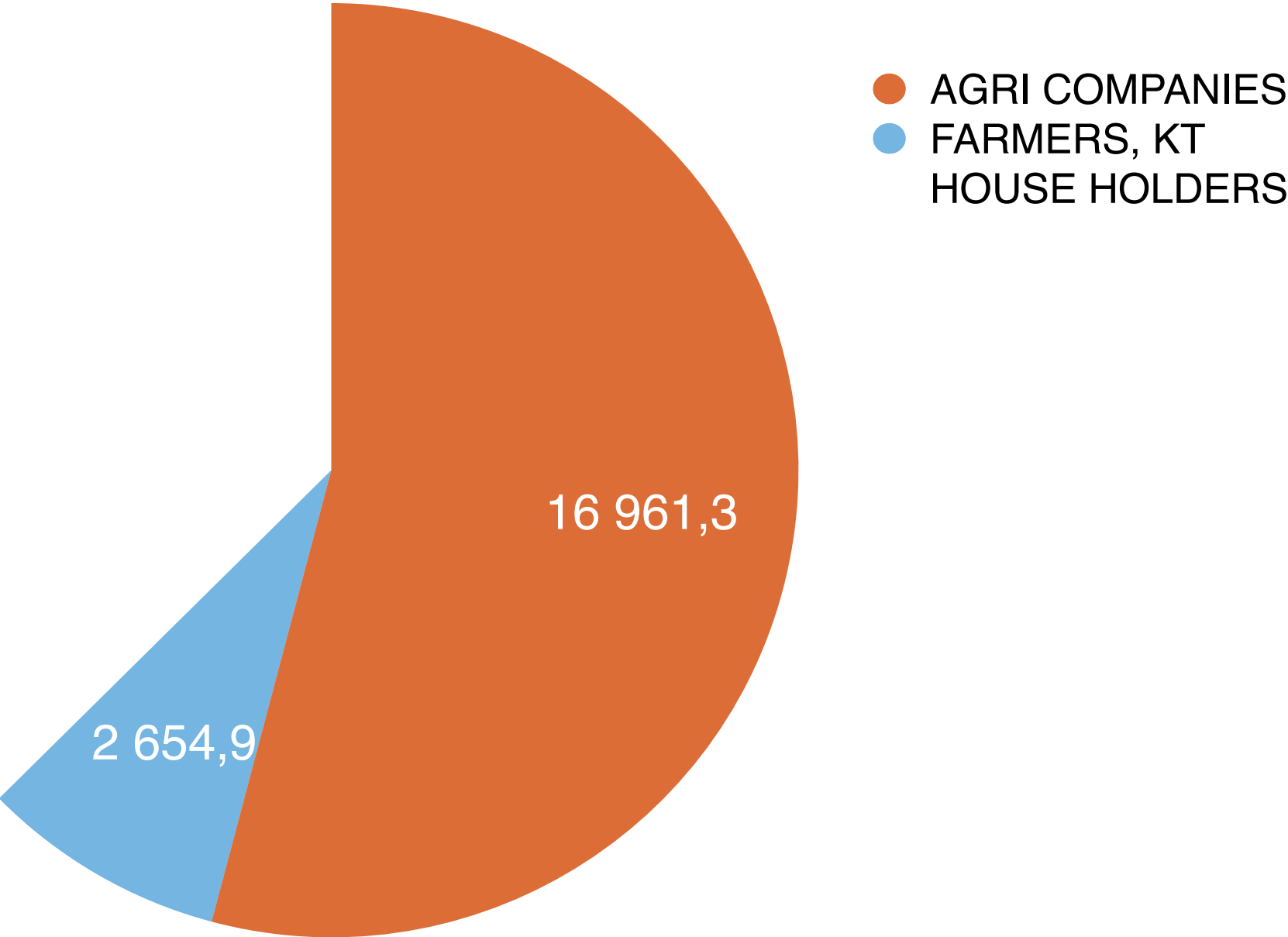
OFFICIAL DATA





19 616,2 KT

REALITY



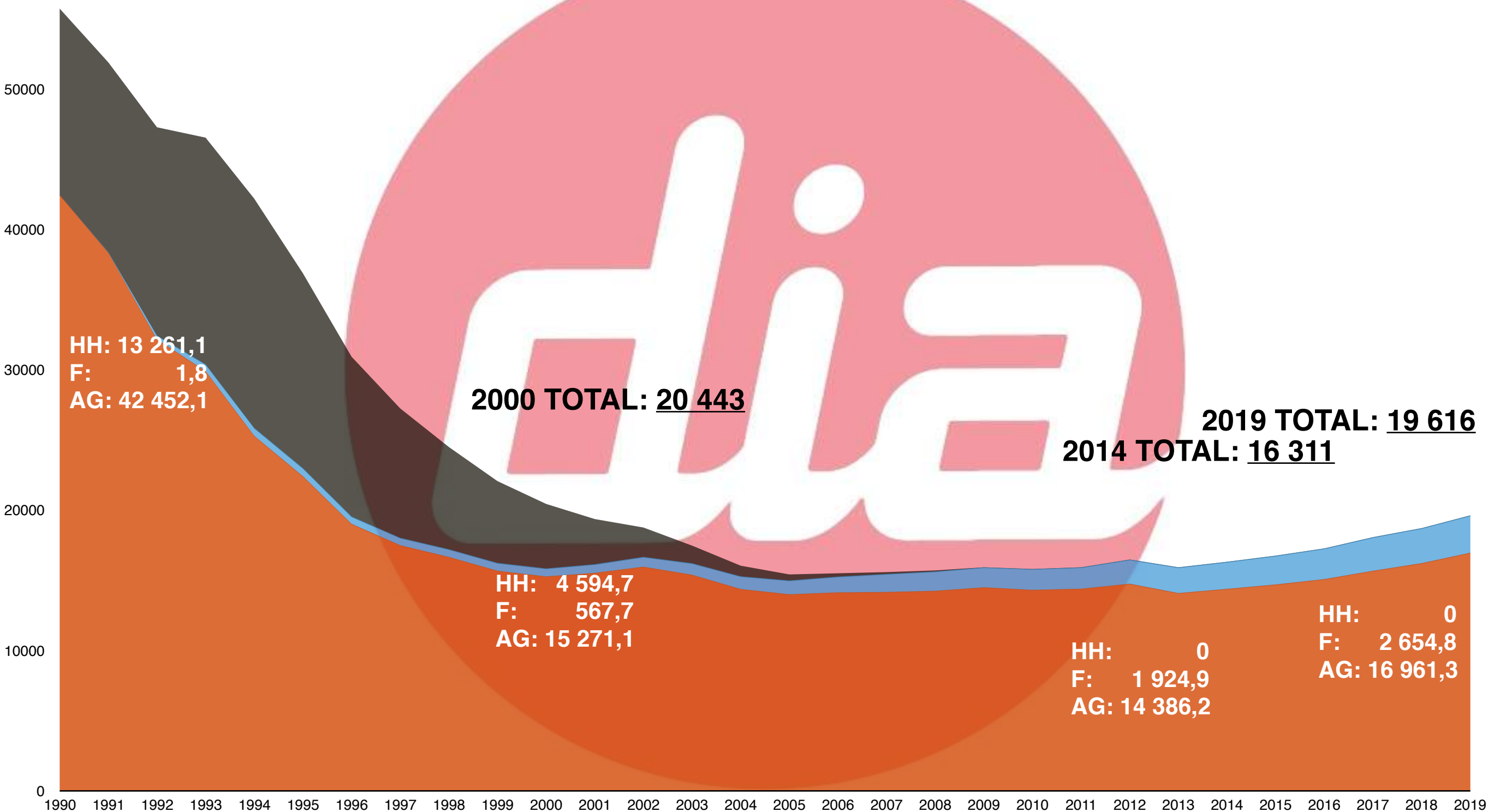


HOW MUCH MILK IS PRODUCED IN RUSSIA

- HOUSE HOLDERS, KT
- FARMERS, KT
- AGRI COMPANIES, KT

60000

1990 TOTAL: 55 715





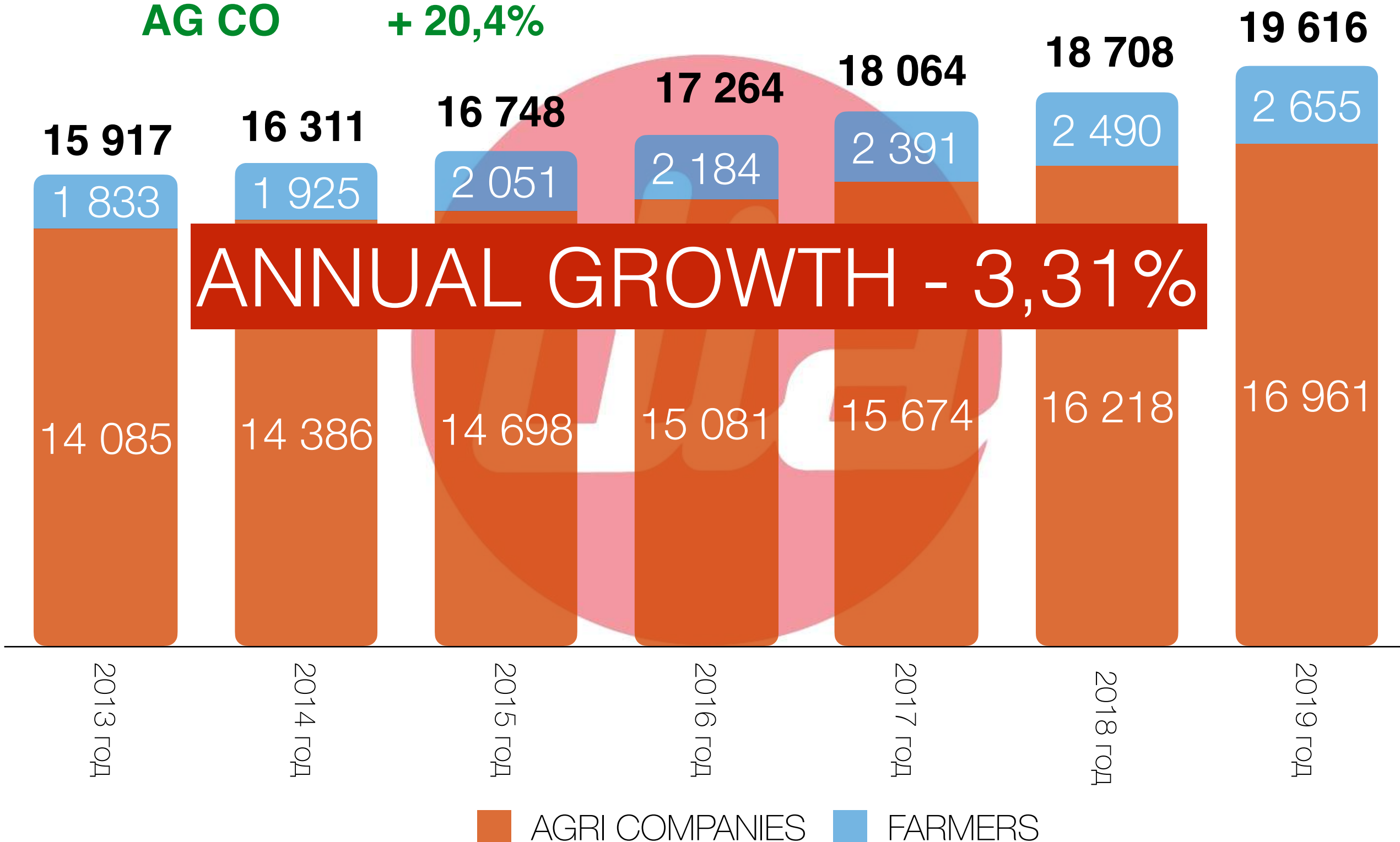
MILK PRODUCTION BY DIFFERENT KINDS OF PRODUCERS

TOTAL + 23,2%

FARMERS + 44,8%

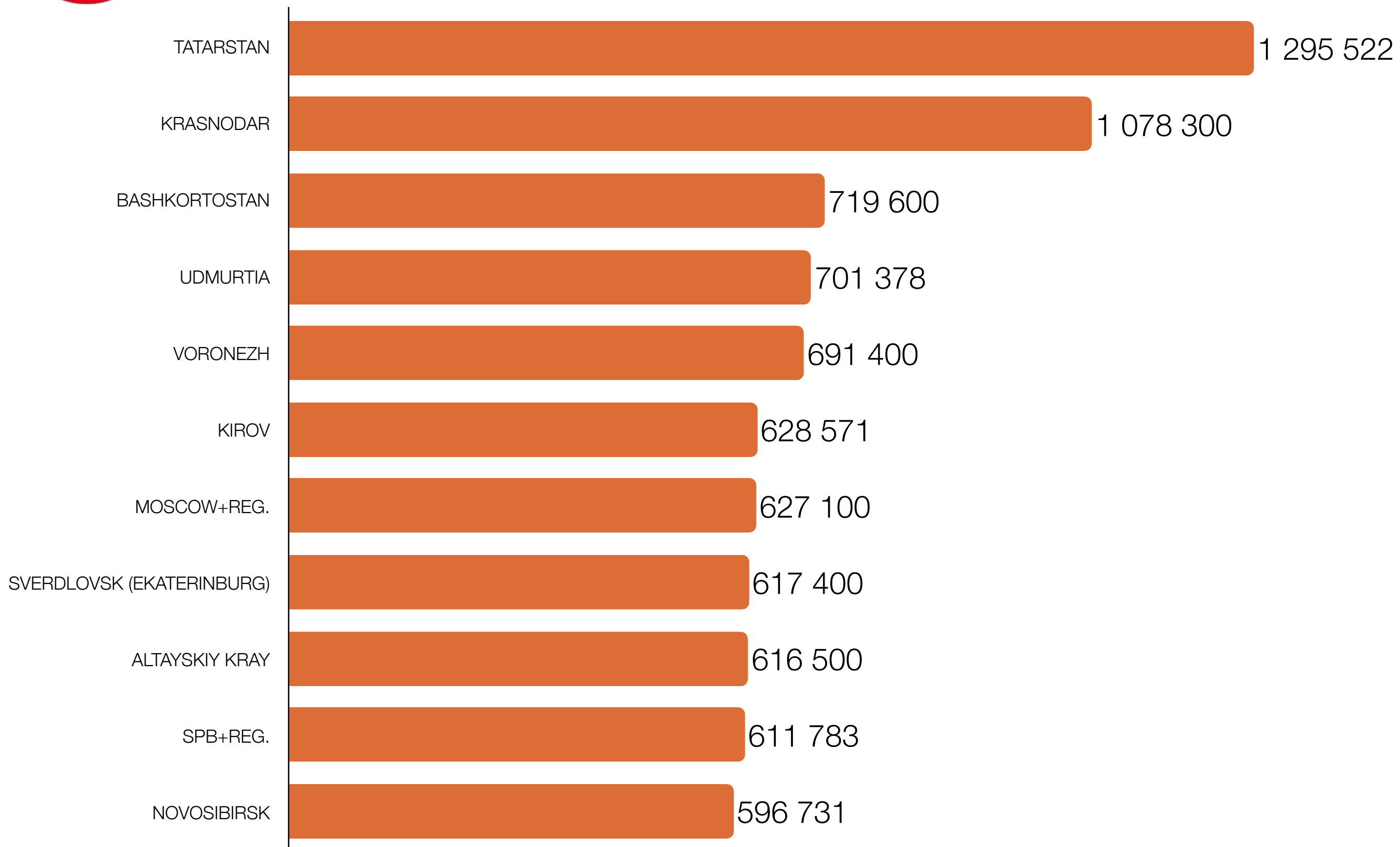
AG CO + 20,4%

ANNUAL GROWTH - 3,31%





TOP-10 REGIONS - MILK PRODUSERS



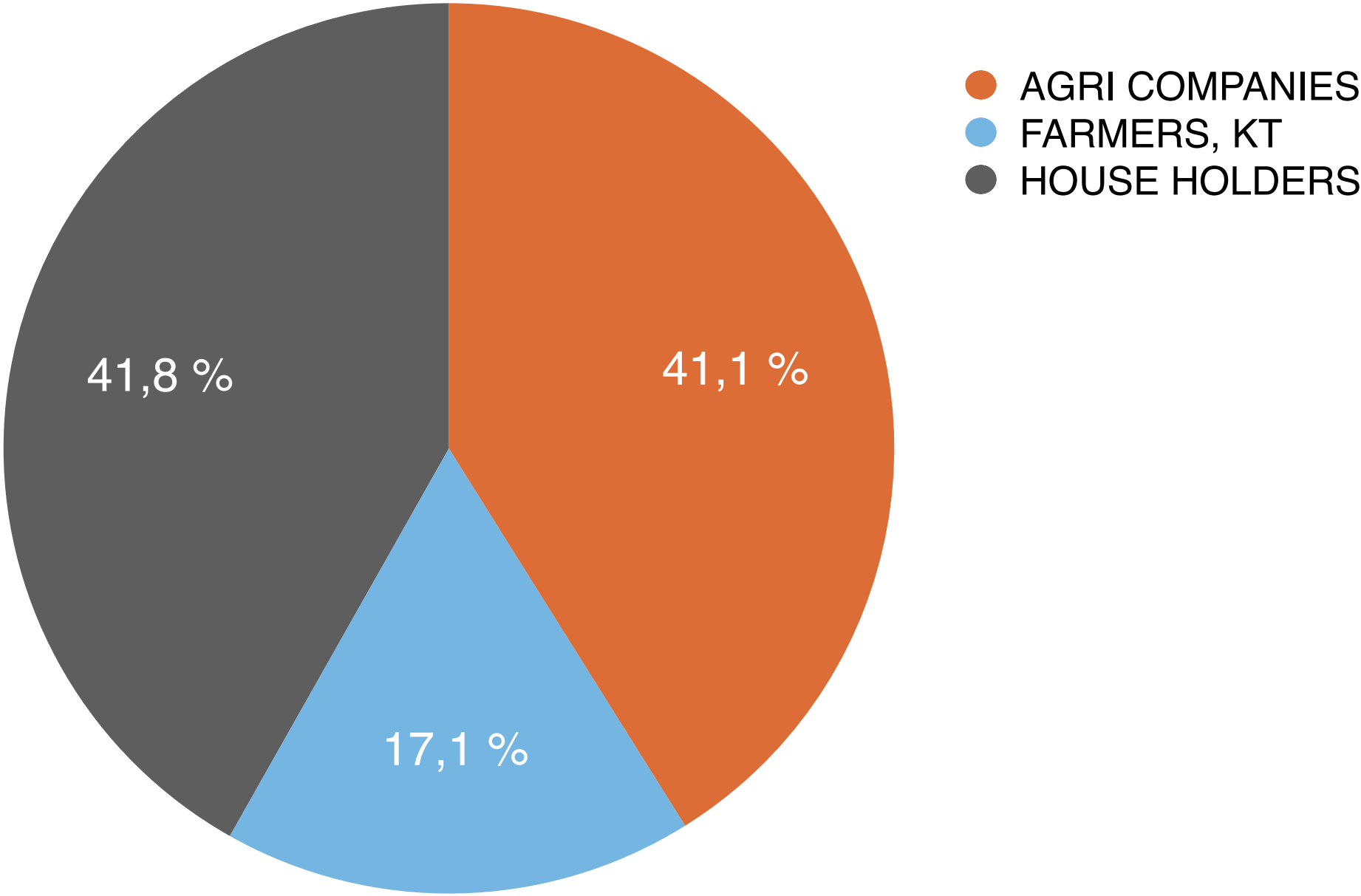


COWS
AMOUNT



7962 K. COWS

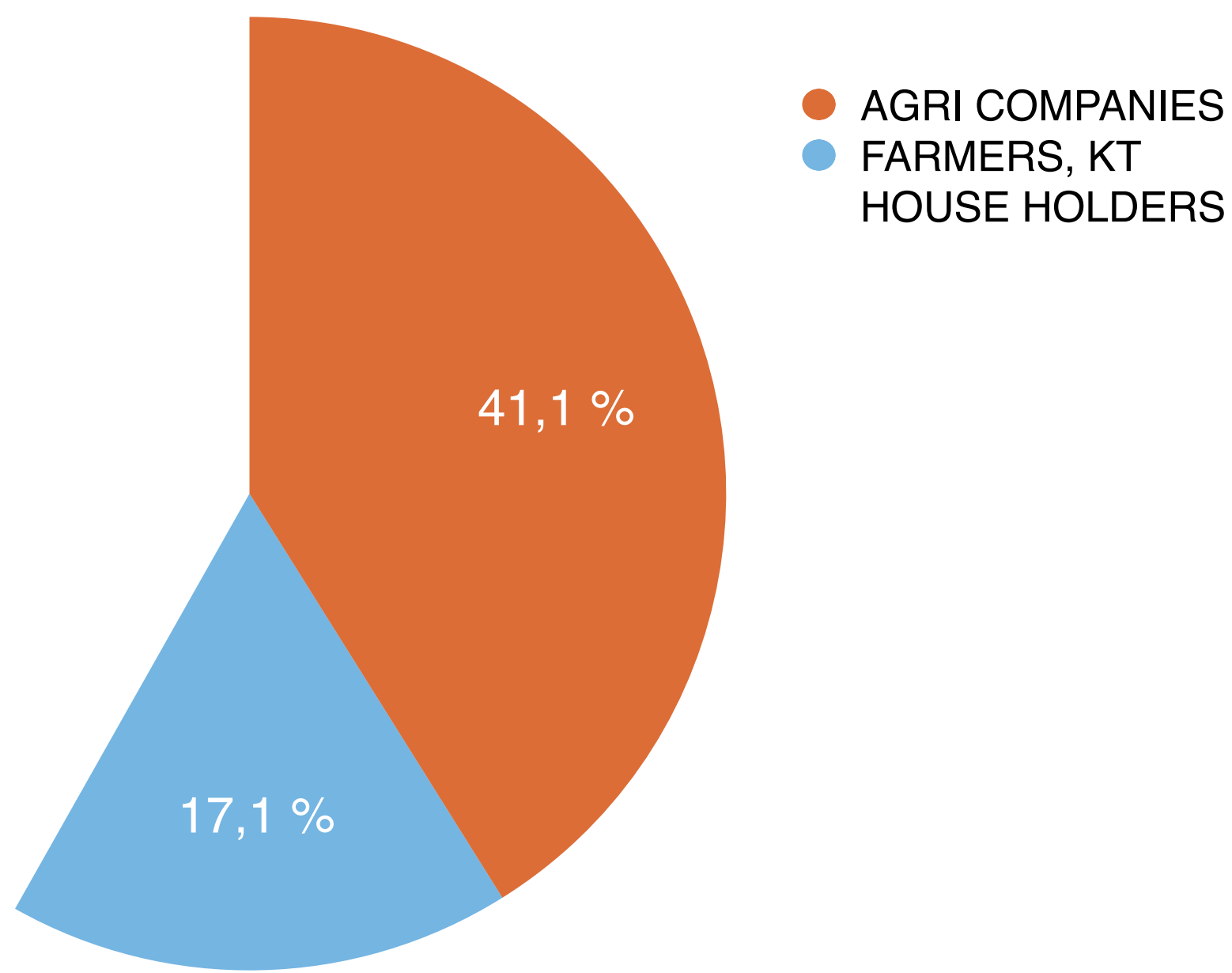
OFFICIAL DATA





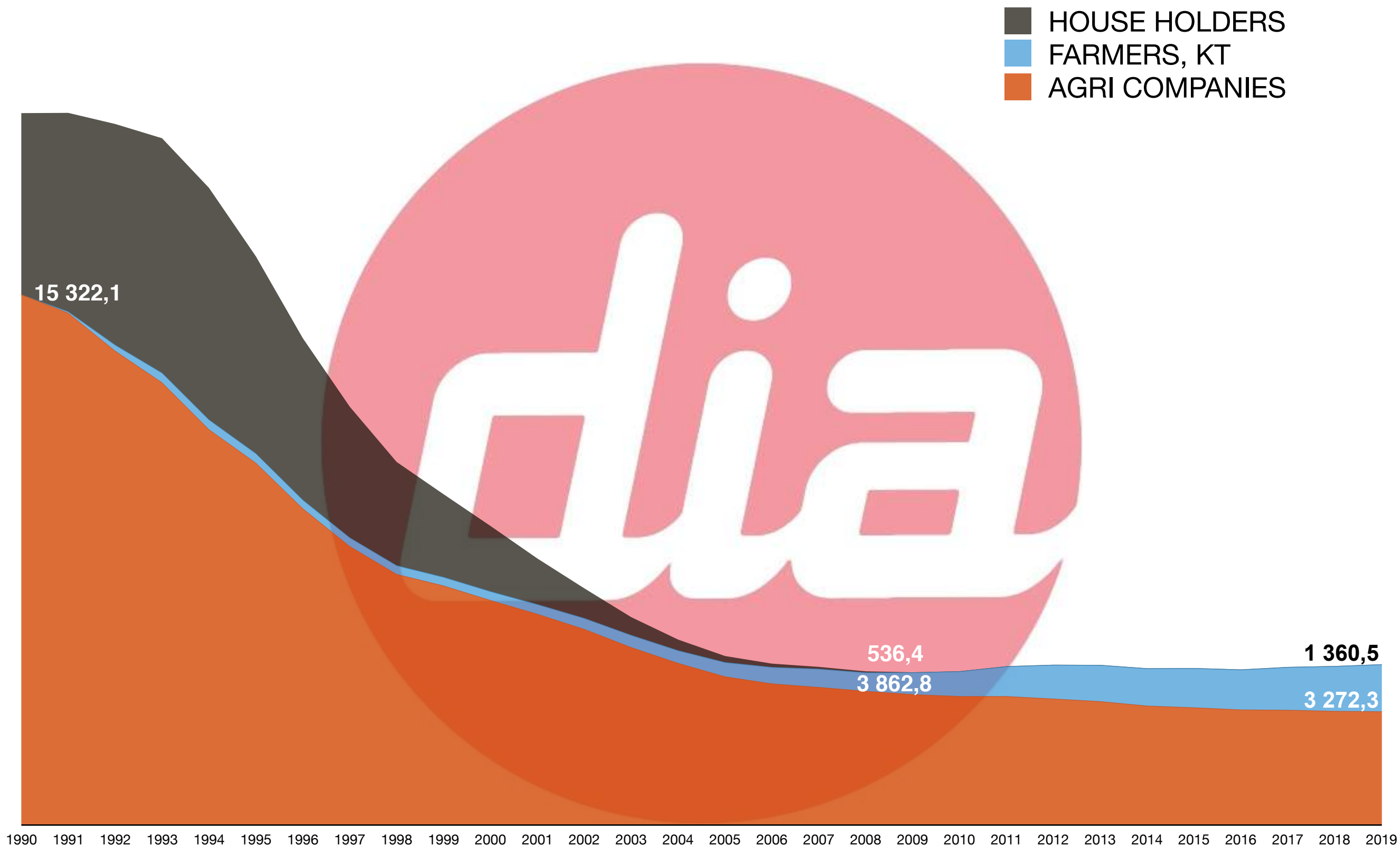
4 632 K. HEADS

REALITY





HOW MANY COWS IN RUSSIA



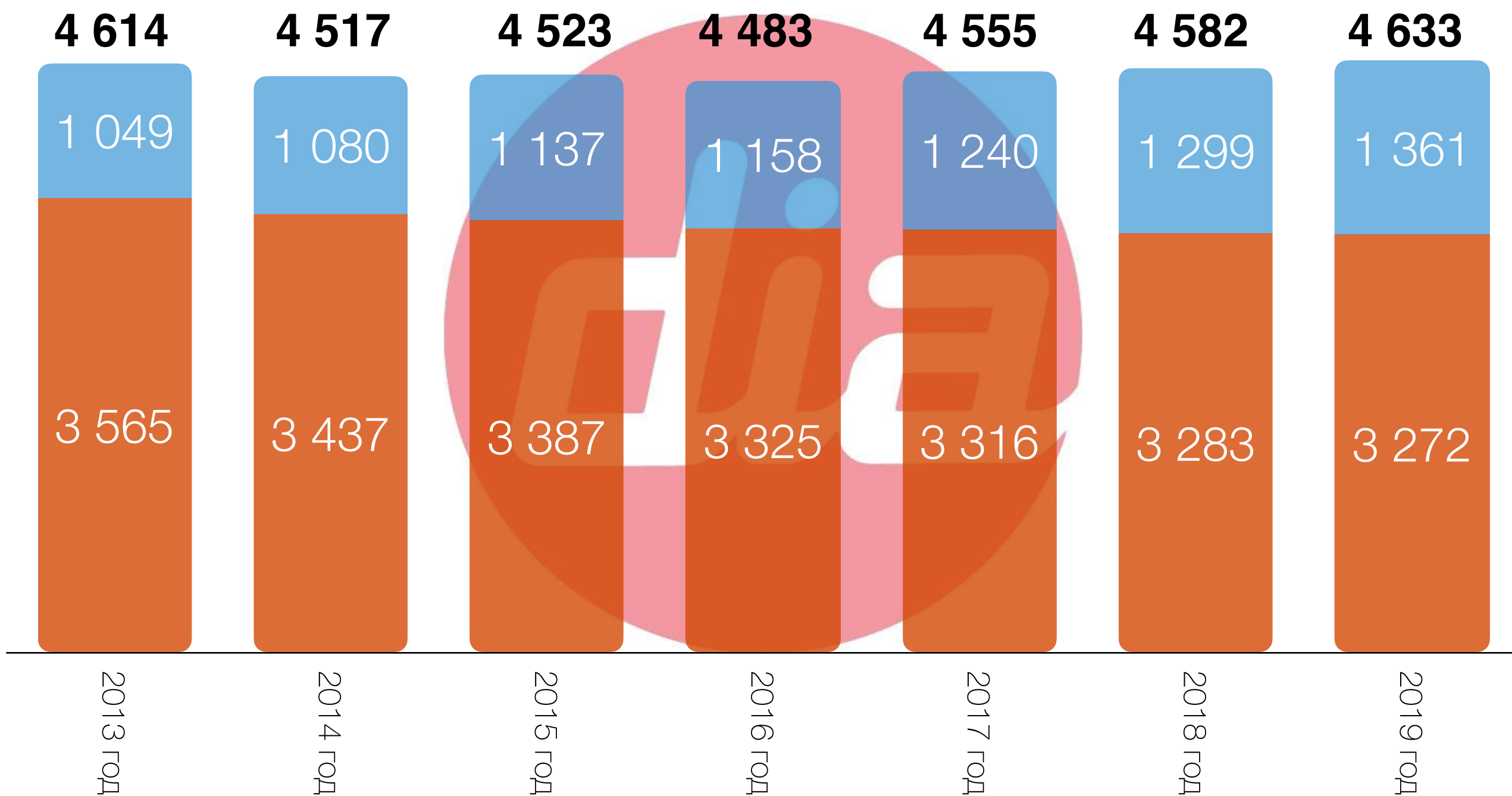


NUMBER OF COWS BY DIFFERENT KINDS OF PRODUCERS

TOTAL - 0,7%

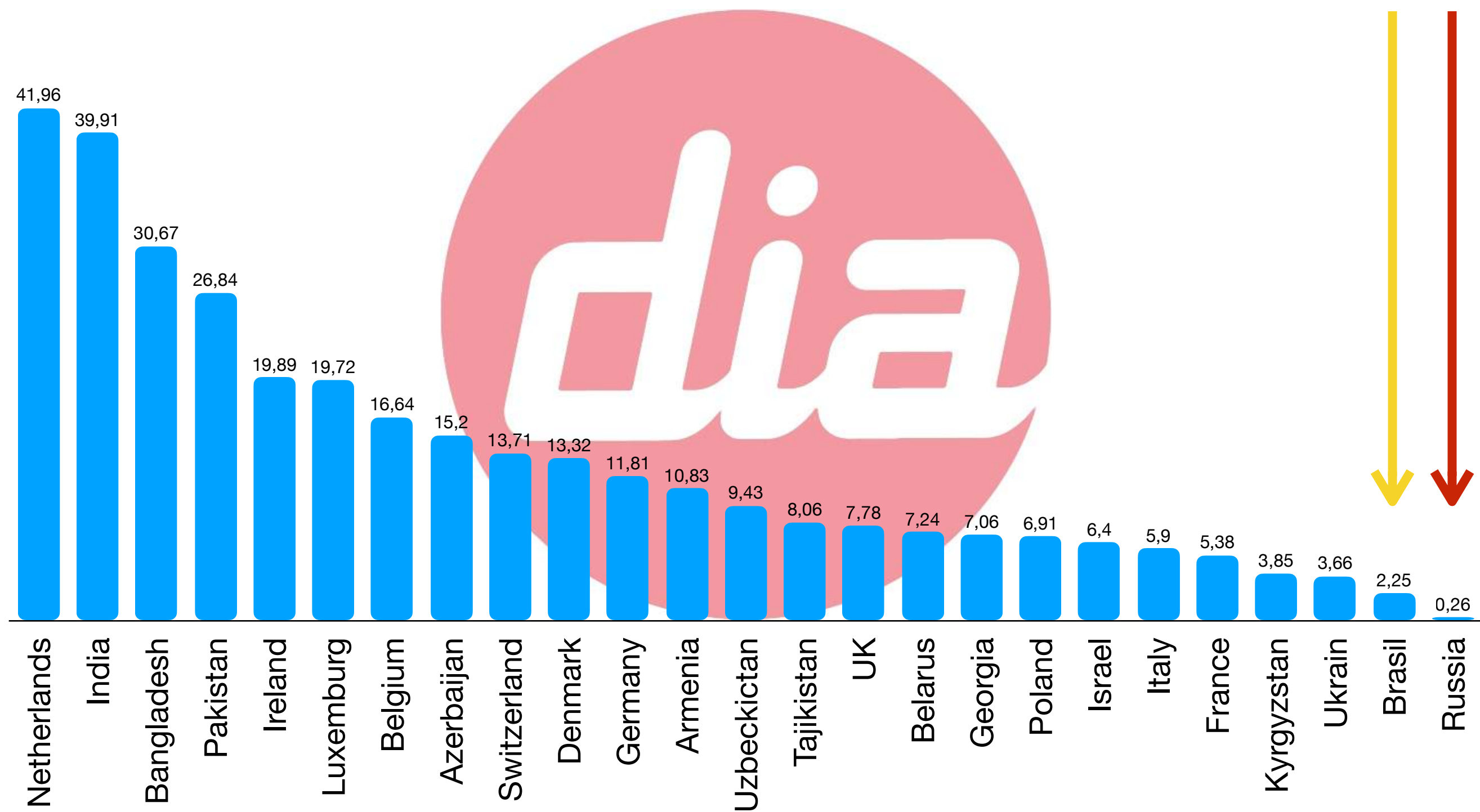
FARMERS + 29,7%

AG CO - 8,2%





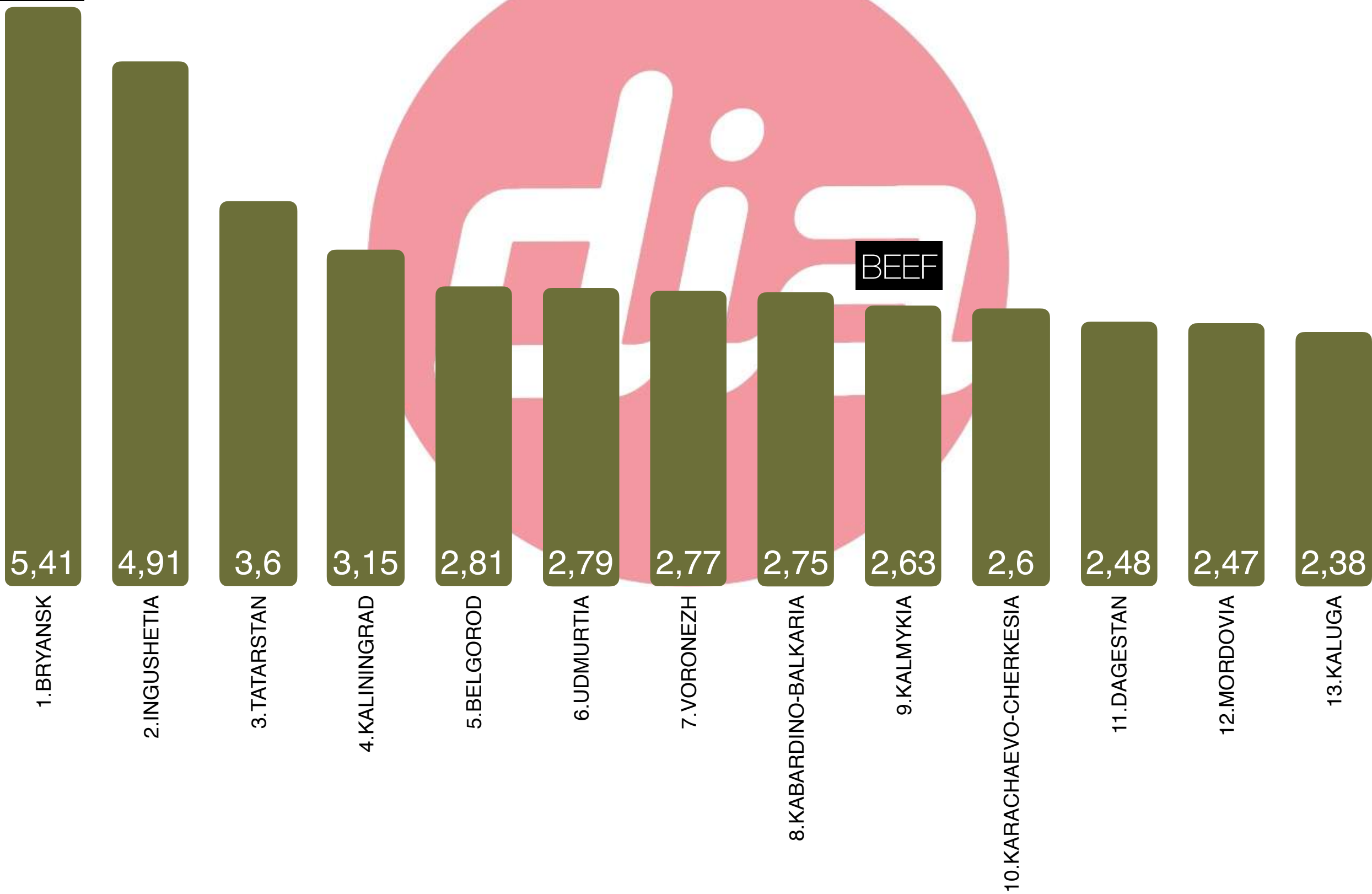
DENSITY OF COWS PER 1 SQ. KM.





DENSITY OF COWS PER 1 SQ. KM.

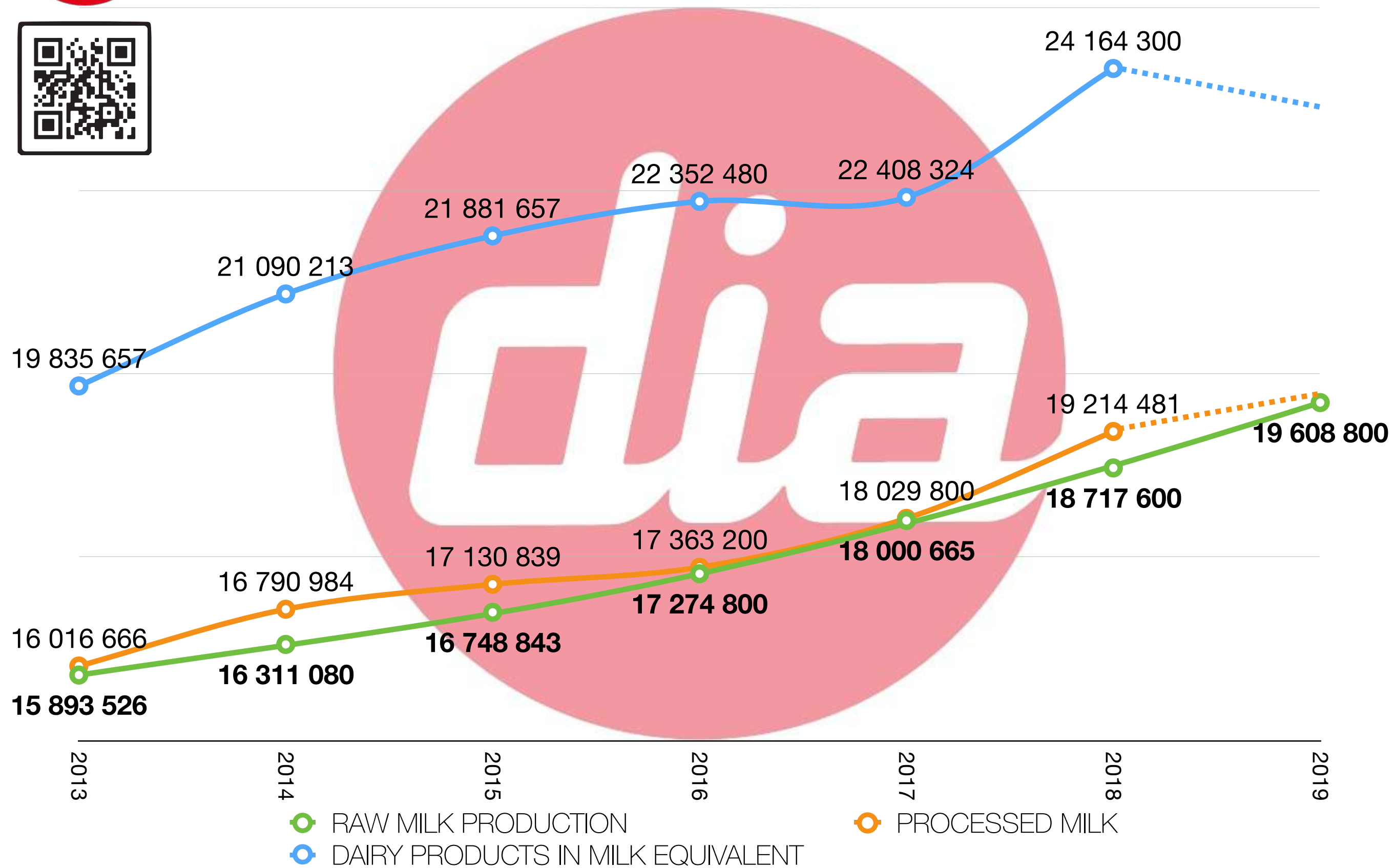
BEEF



BEEF

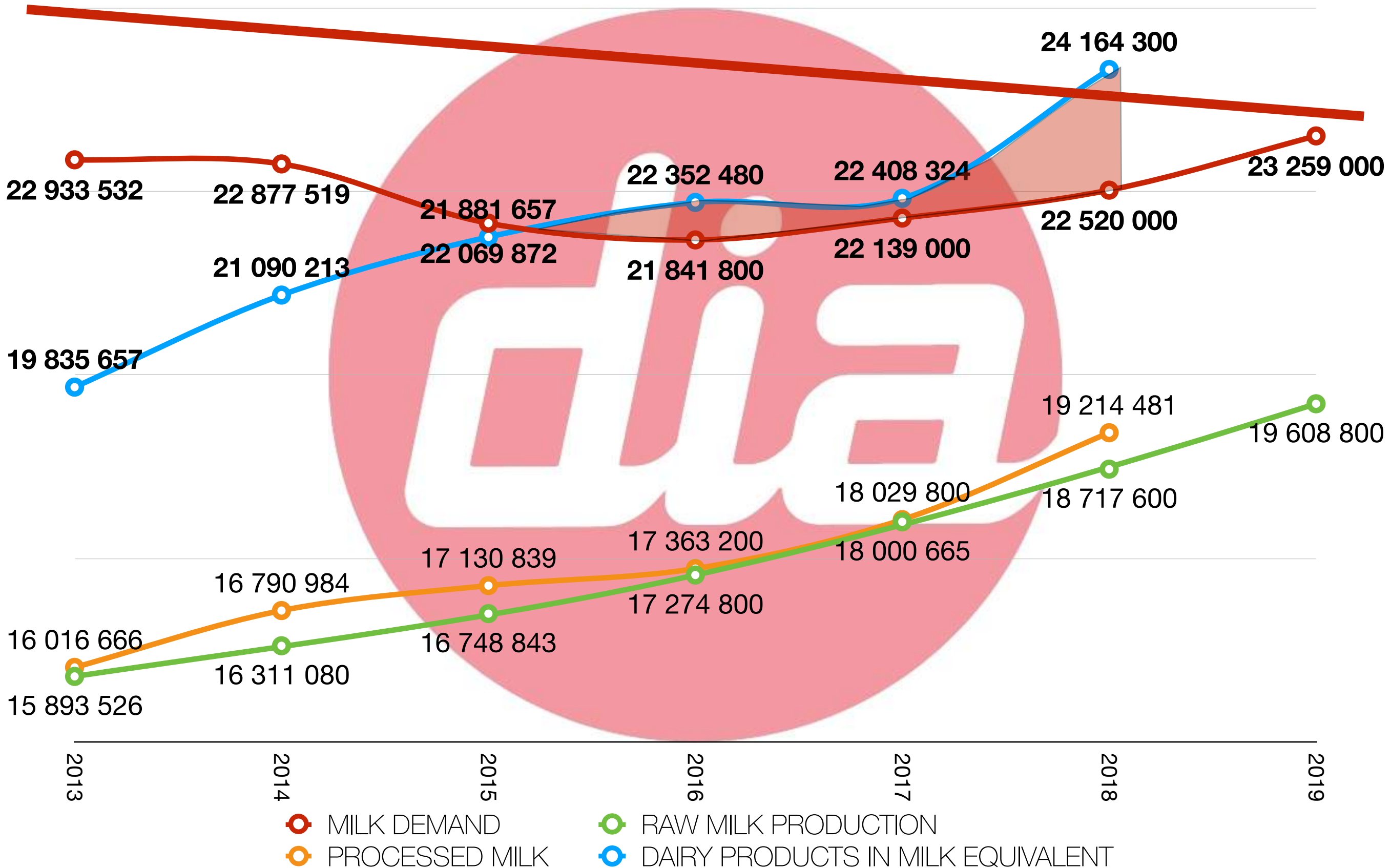


MILK PRODUCTION AND PROCESSING





MILK CONSUMPTION

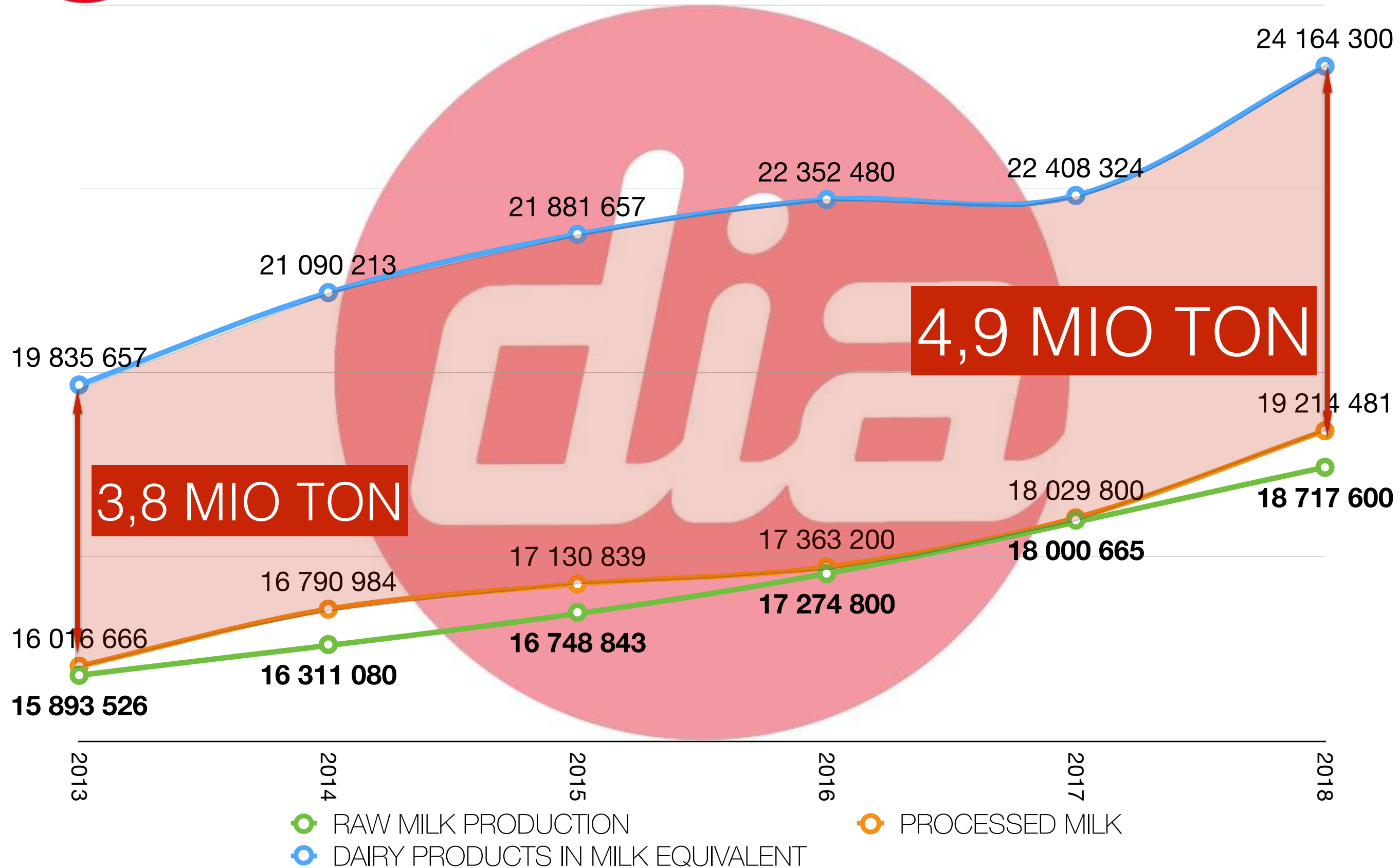




INPORT SUBSTITUTION



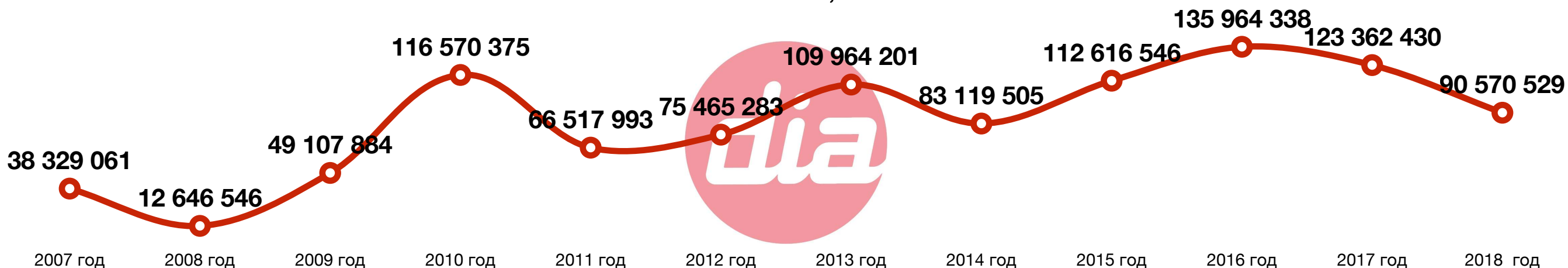
IMPORT SUBSTITUTION DIDN'T TAKE PLACE



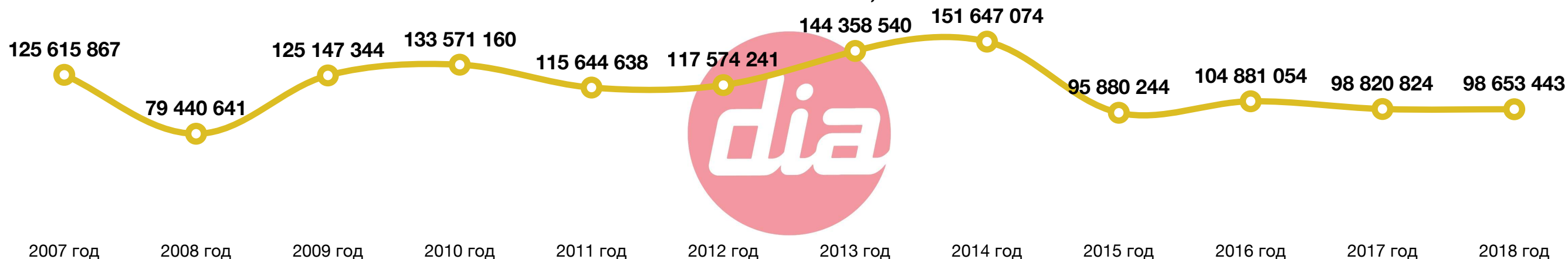


IMPORT SUBSTITUTION DIDN'T TAKE PLACE

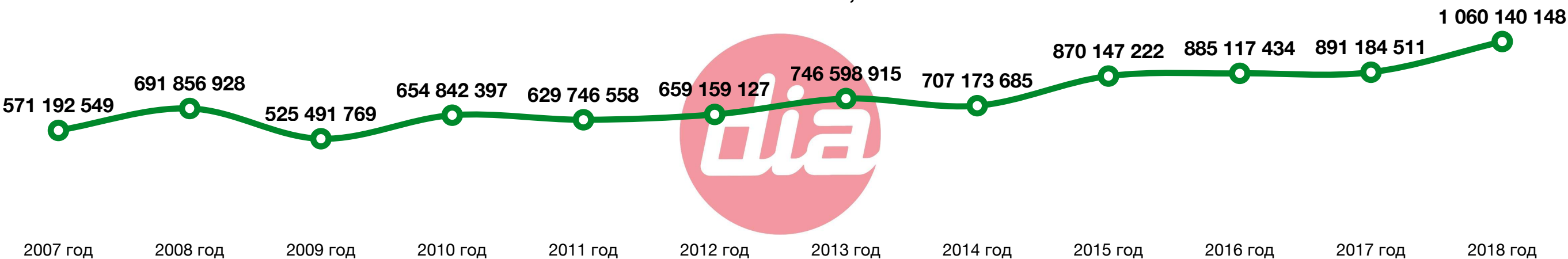
IMPORT SMP, KG



IMPORT DAIRY FATS, KG



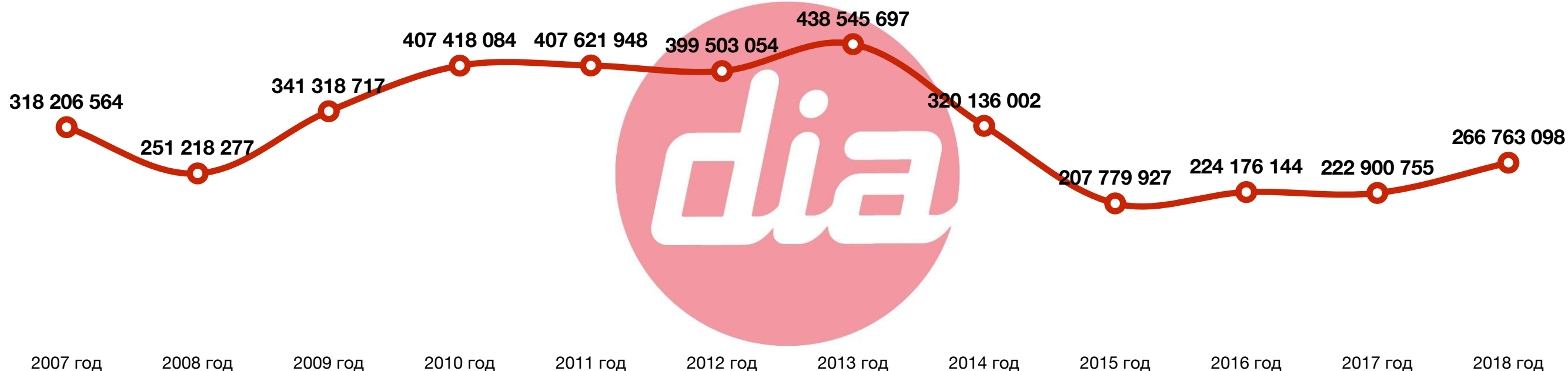
IMPORT PALM OIL, KG



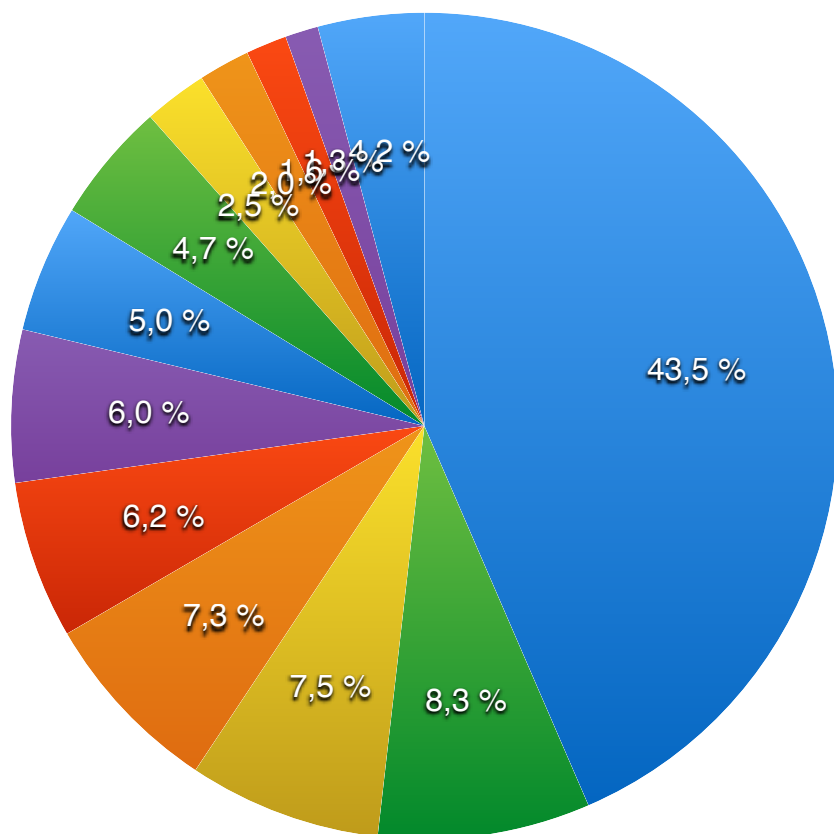


IMPORT SUBSTITUTION DIDN'T TAKE PLACE

IMPORT CHEESE, KG

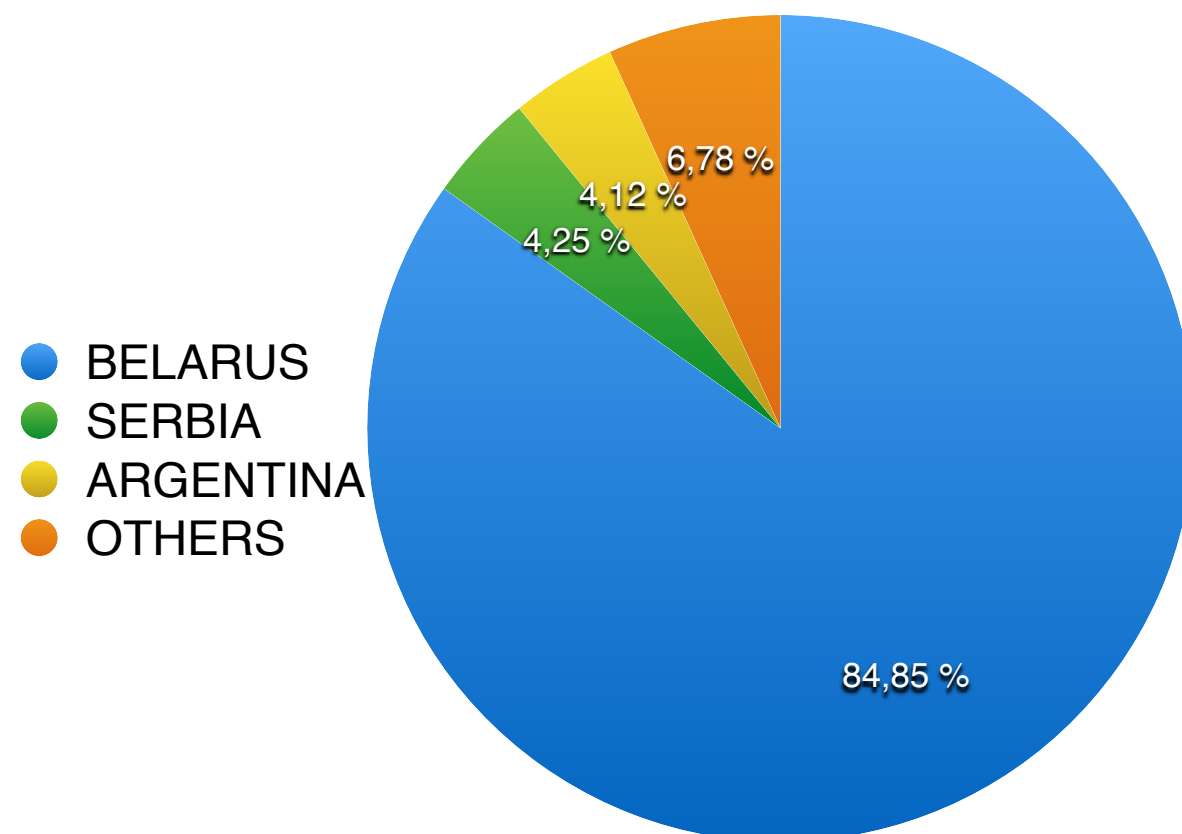


CHEESE SUPPLIERS, 2014



- BY-BELARUS
- NL-NETHERLANDS
- LT-LITUANIA
- FI-FINLAND
- AR-ARGENTINA
- PL-POLAND
- DK-DENMARK
- DE-GERMANY
- RS-SERBIA
- IT-ITALY
- FR-FRANCE
- LV-LATVIA
- OTHERS

CHEESE SUPPLIERS, 2018

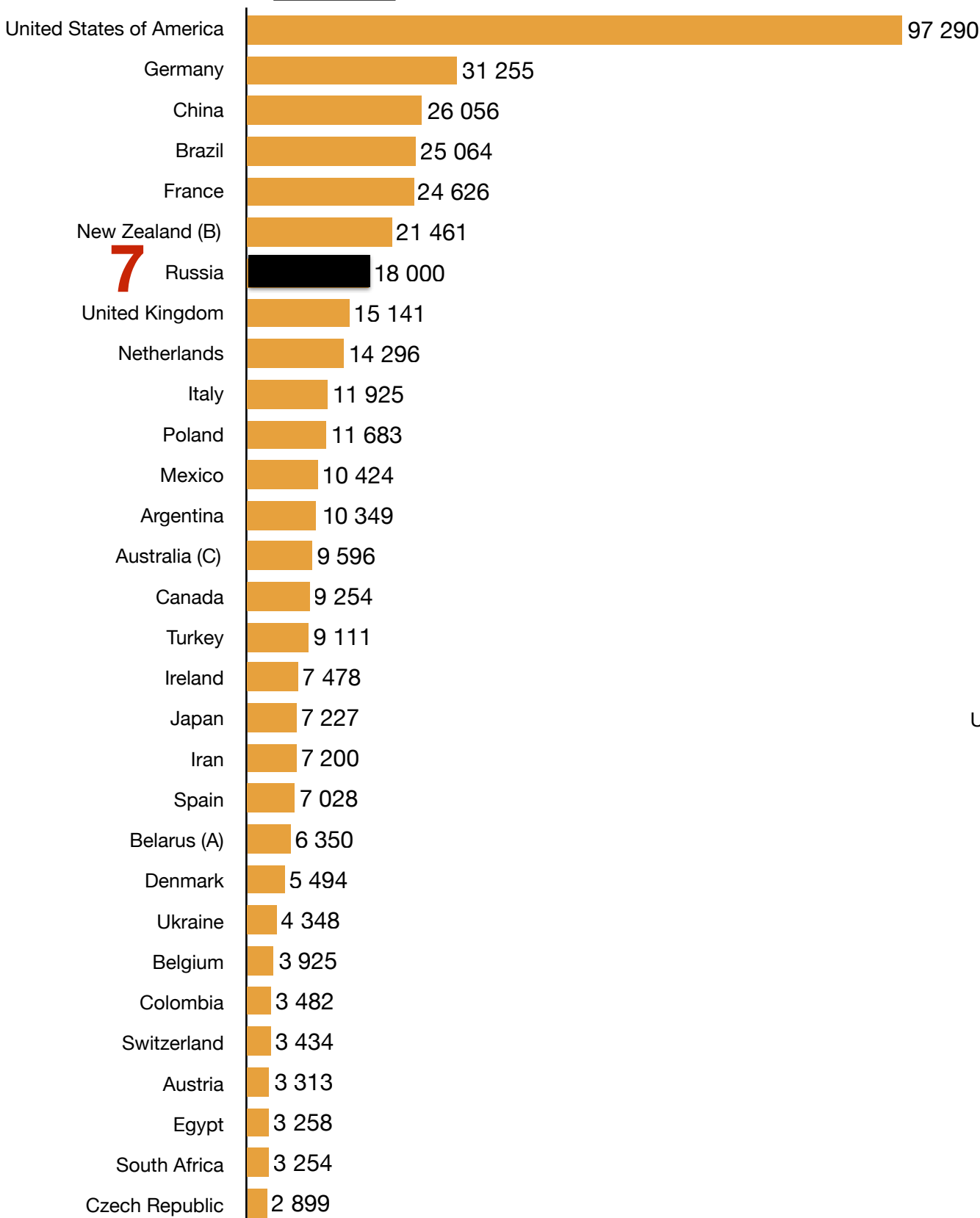


- BELARUS
- SERBIA
- ARGENTINA
- OTHERS

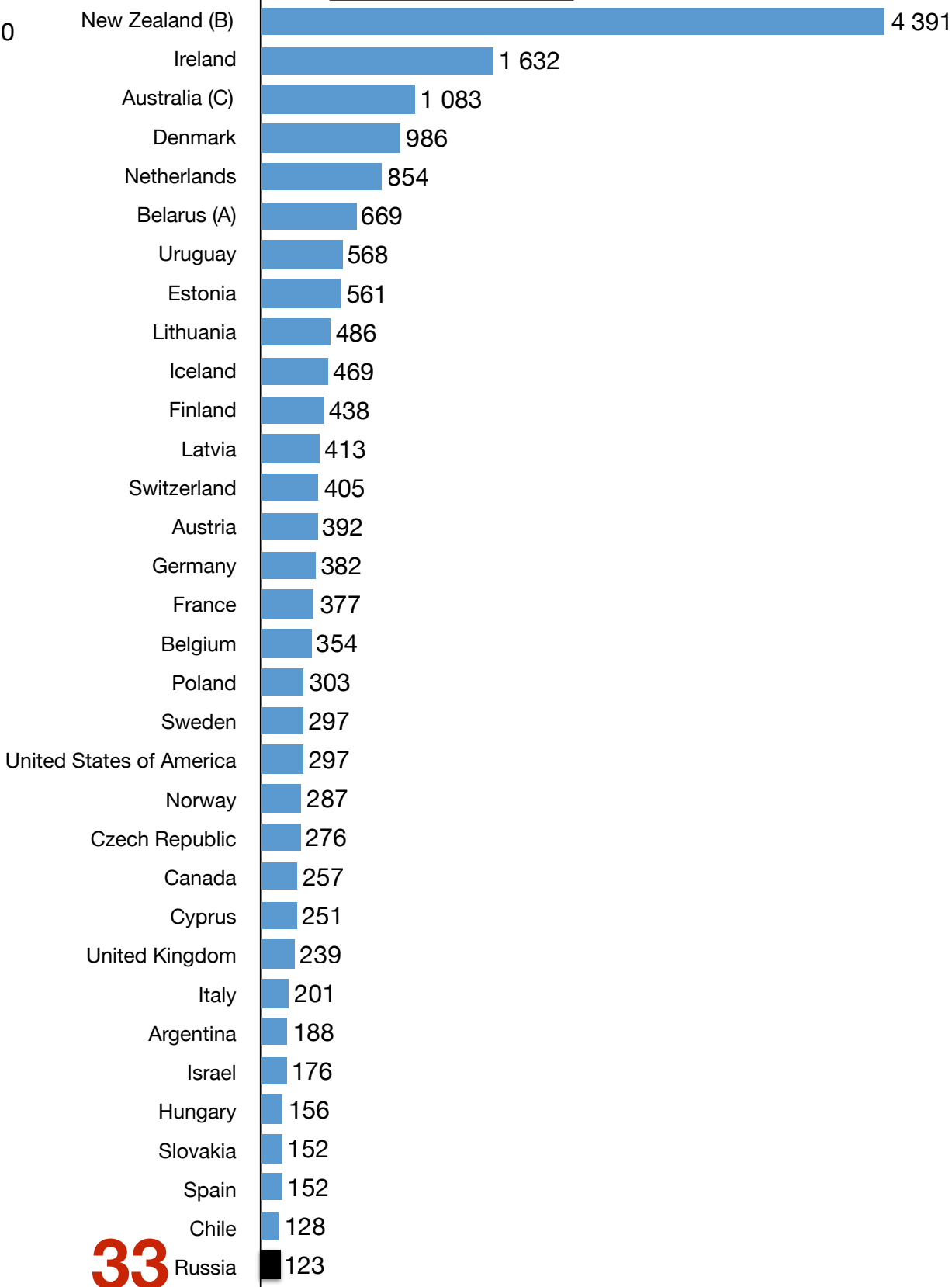


RAW MIL DELIVERY

TOTAL



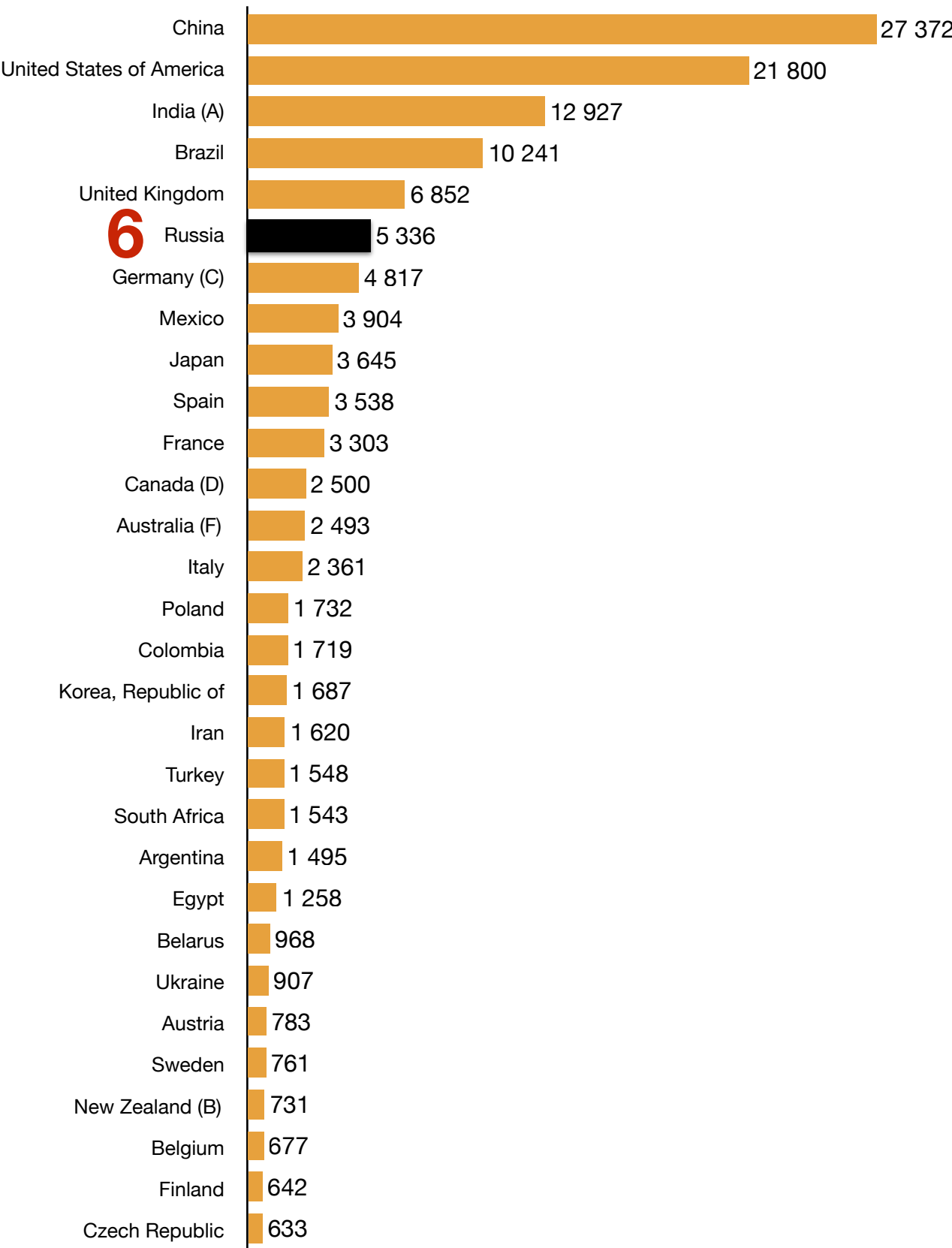
PER CAPITA



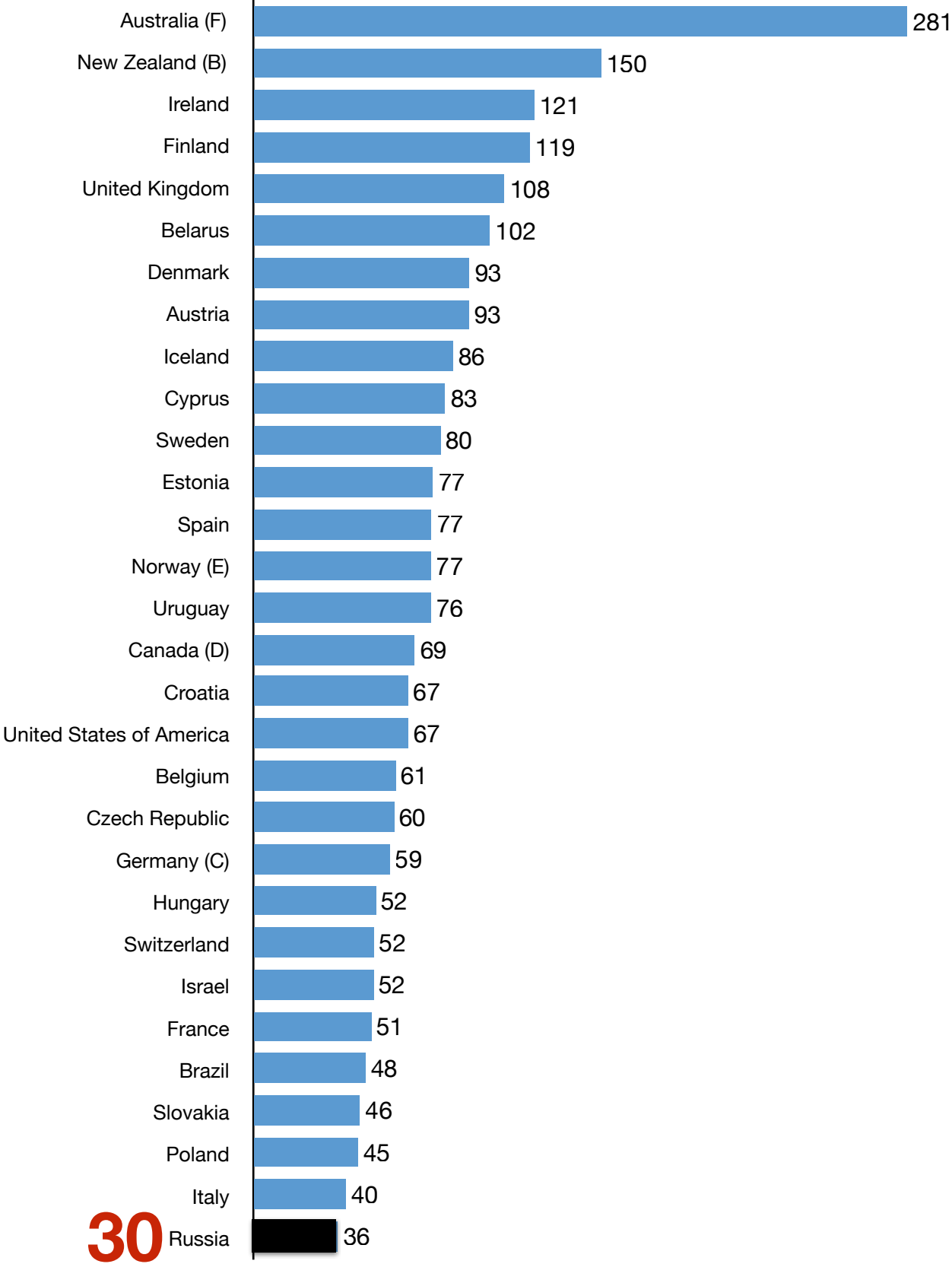


DRINKING MILK PRODUCTION

TOTAL



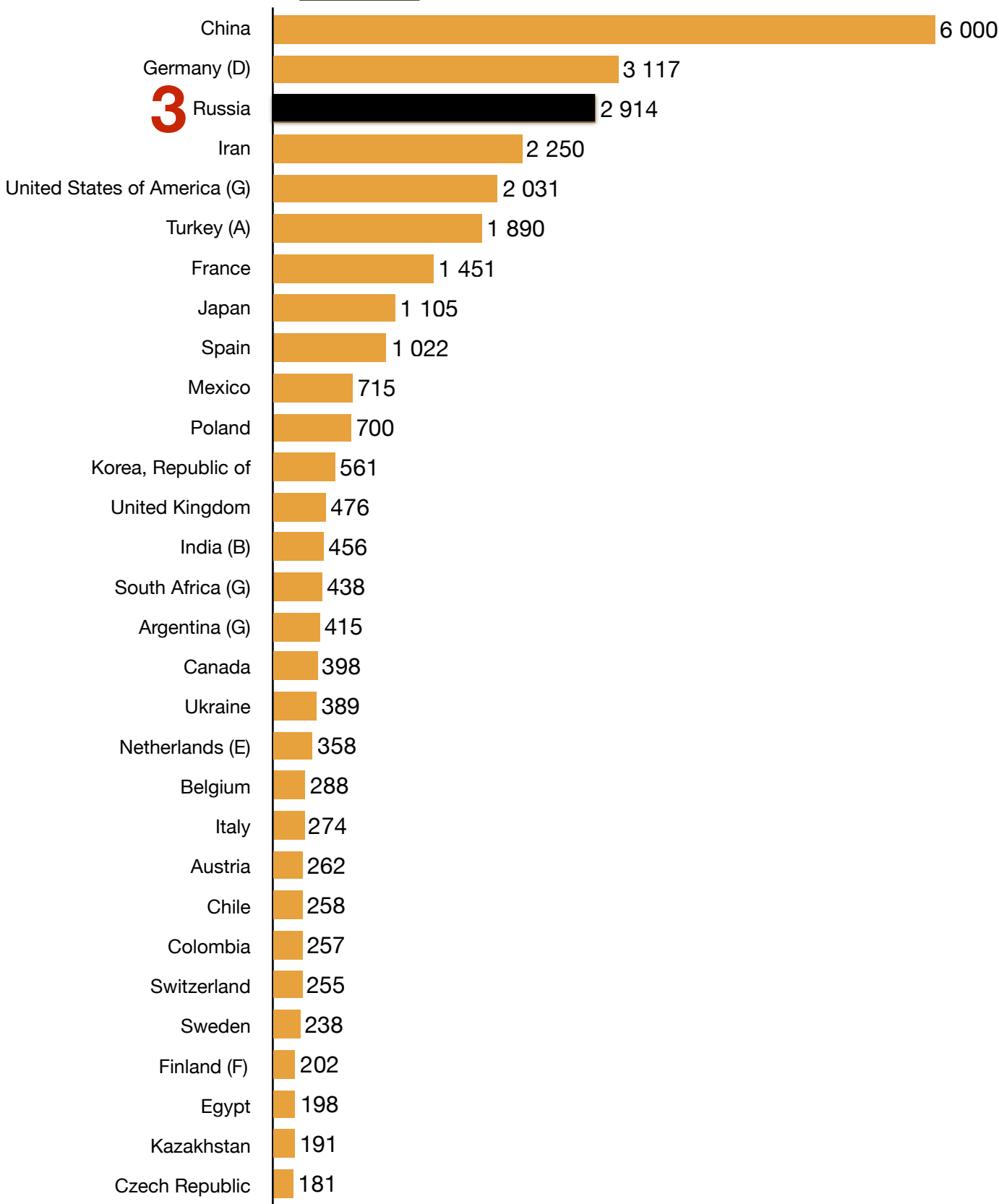
PER CAPITA



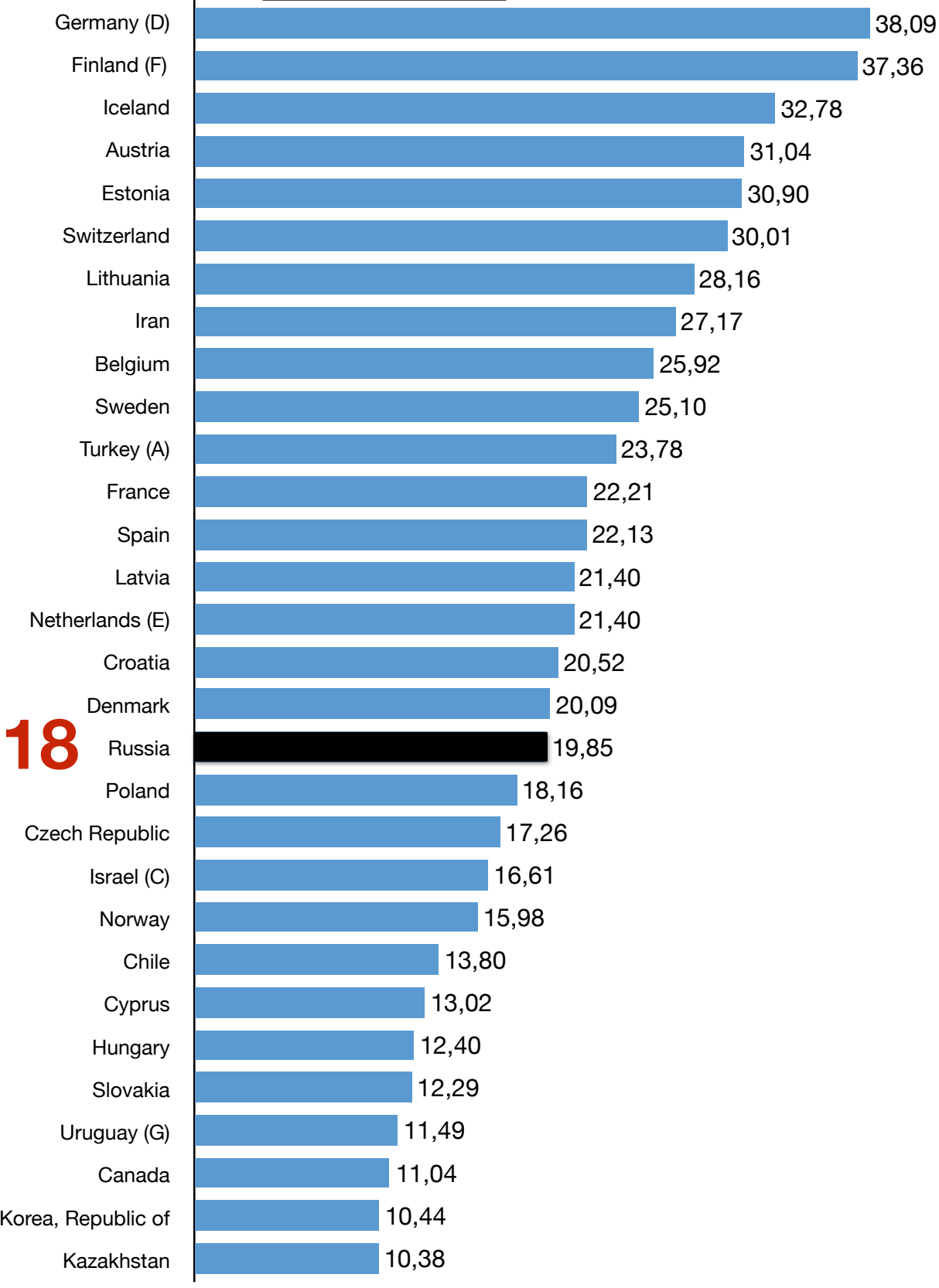


FERMENTED PRODUCTS PRODUCTION

TOTAL



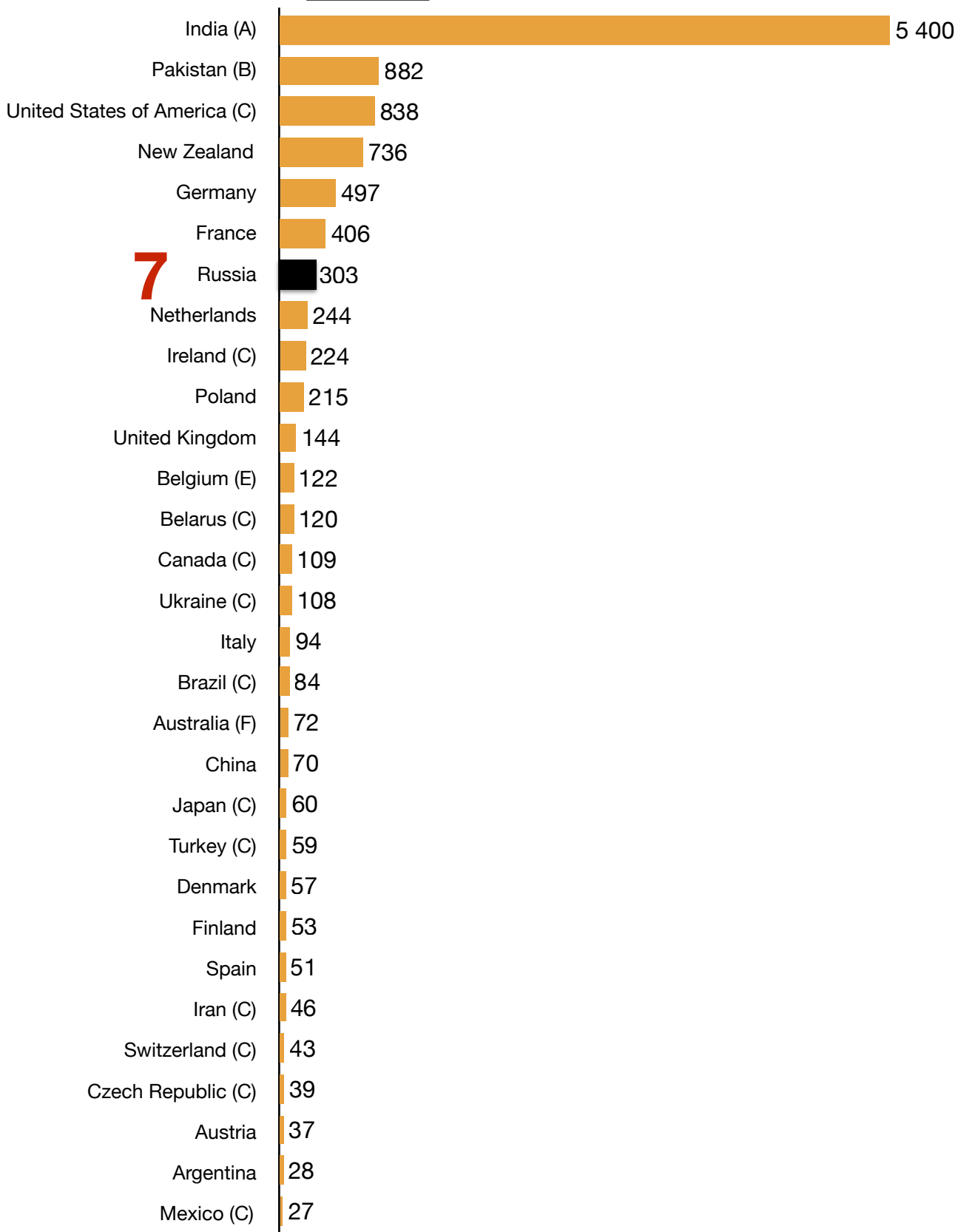
PER CAPITA



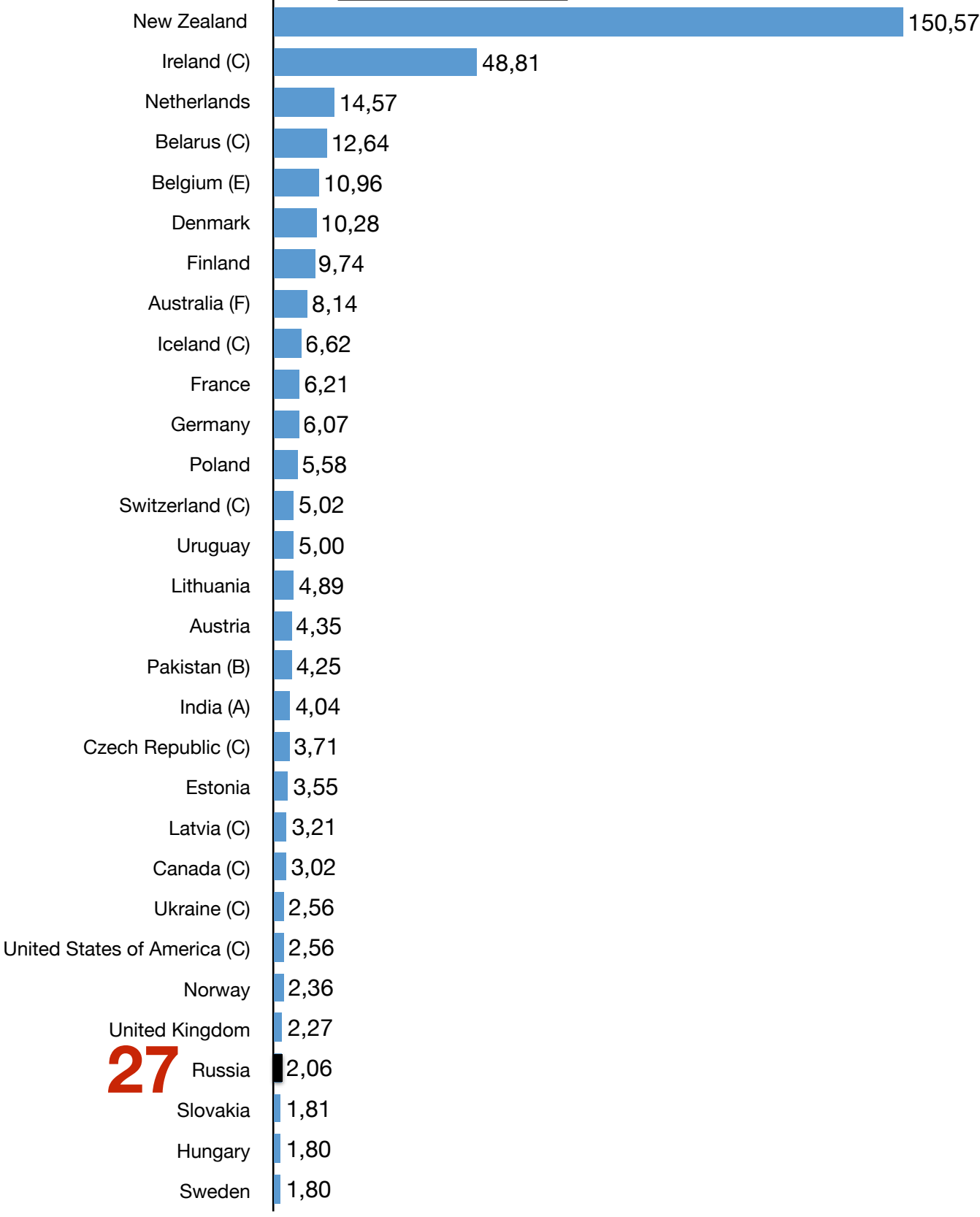


BUTTER PRODUCTION

TOTAL



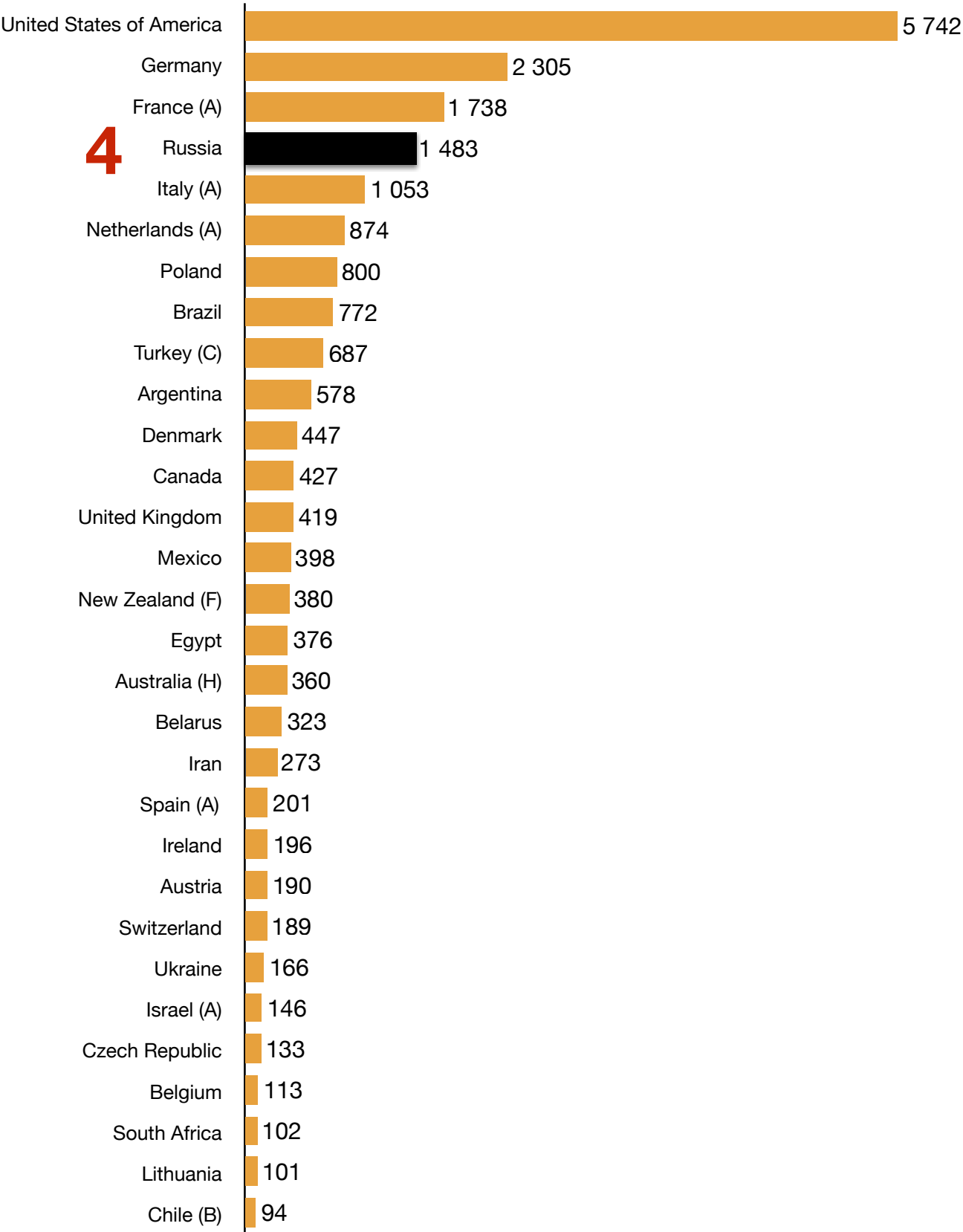
PER CAPITA



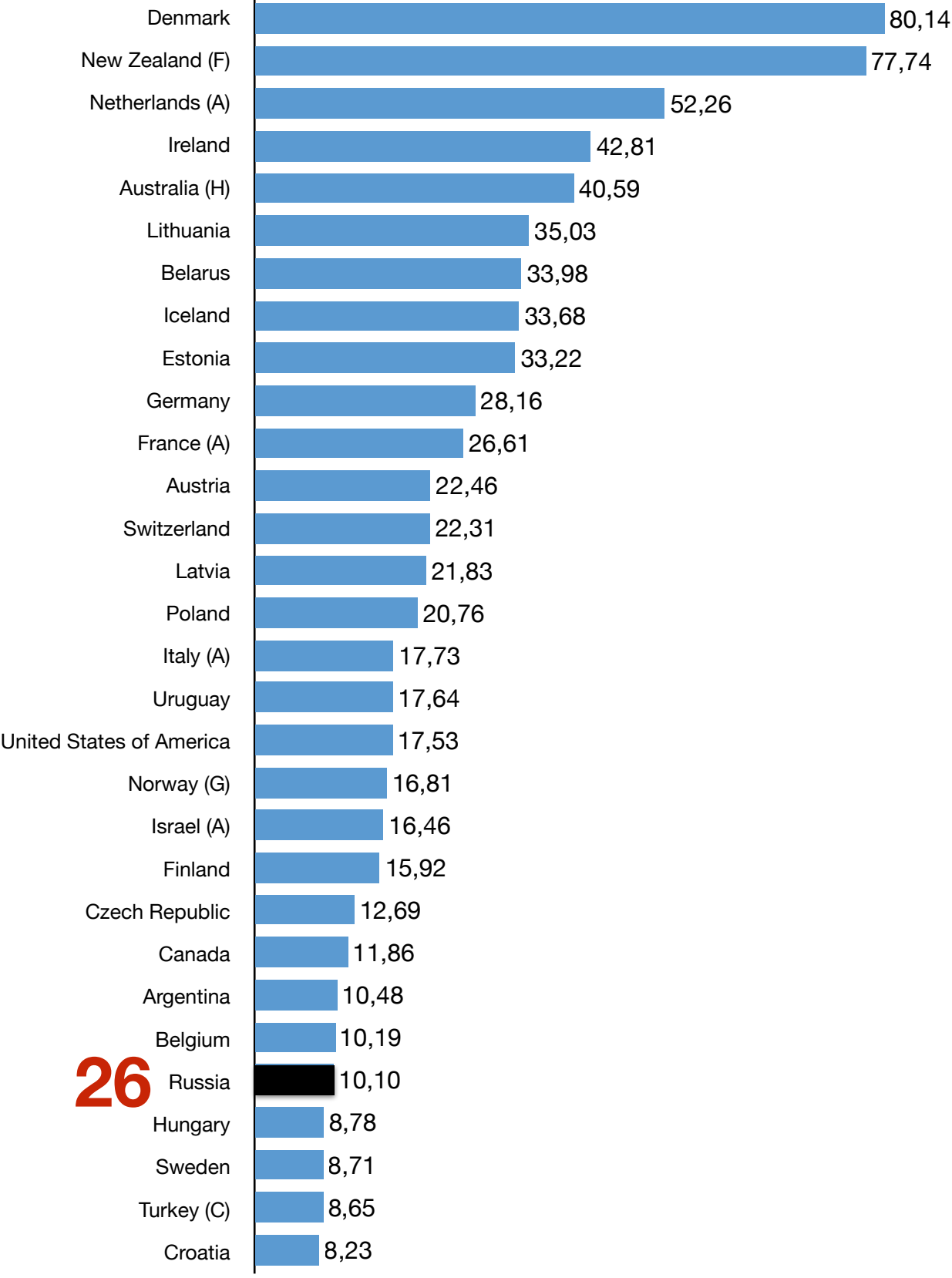


CHEESE PRODUCTION

TOTAL



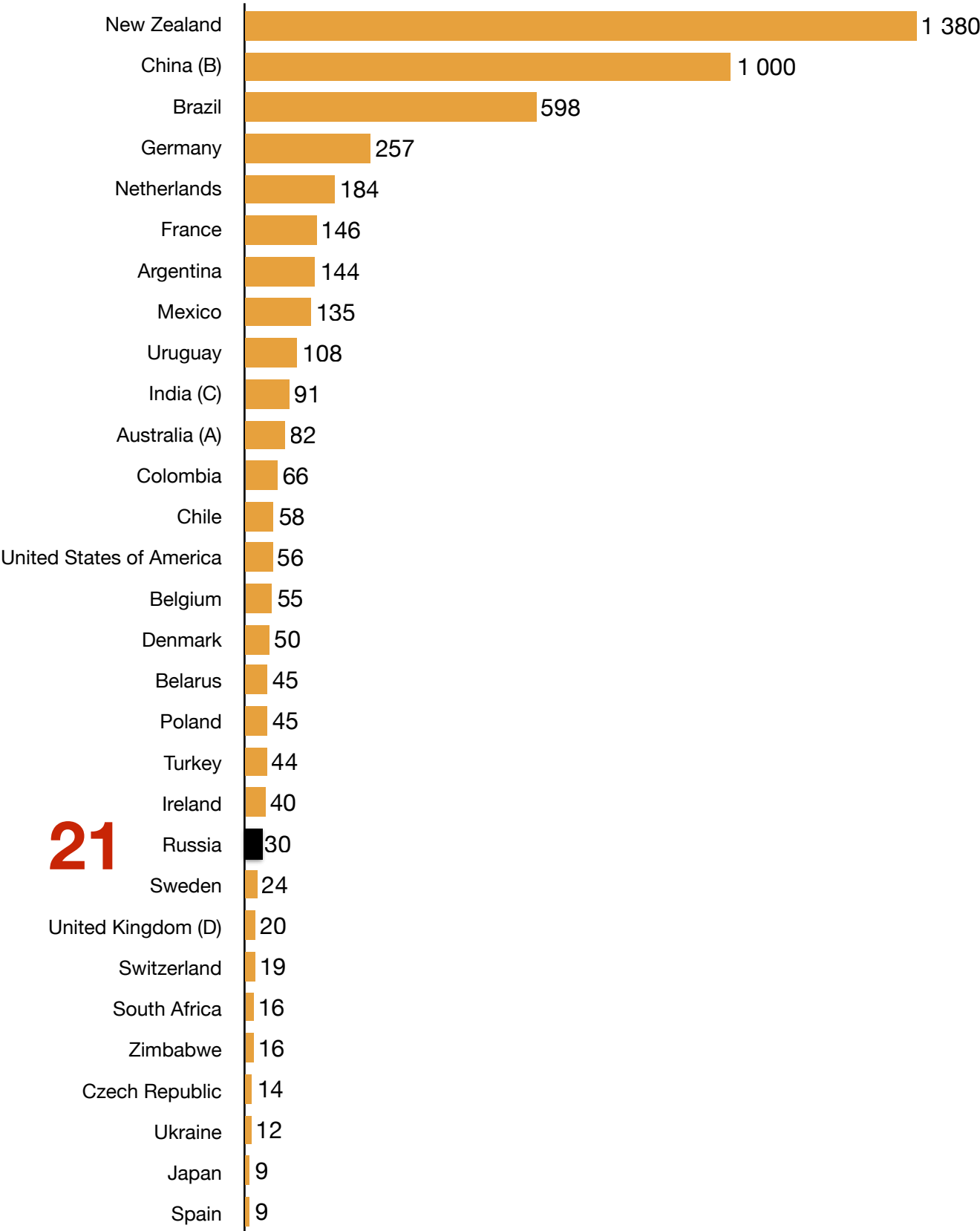
PER CAPITA



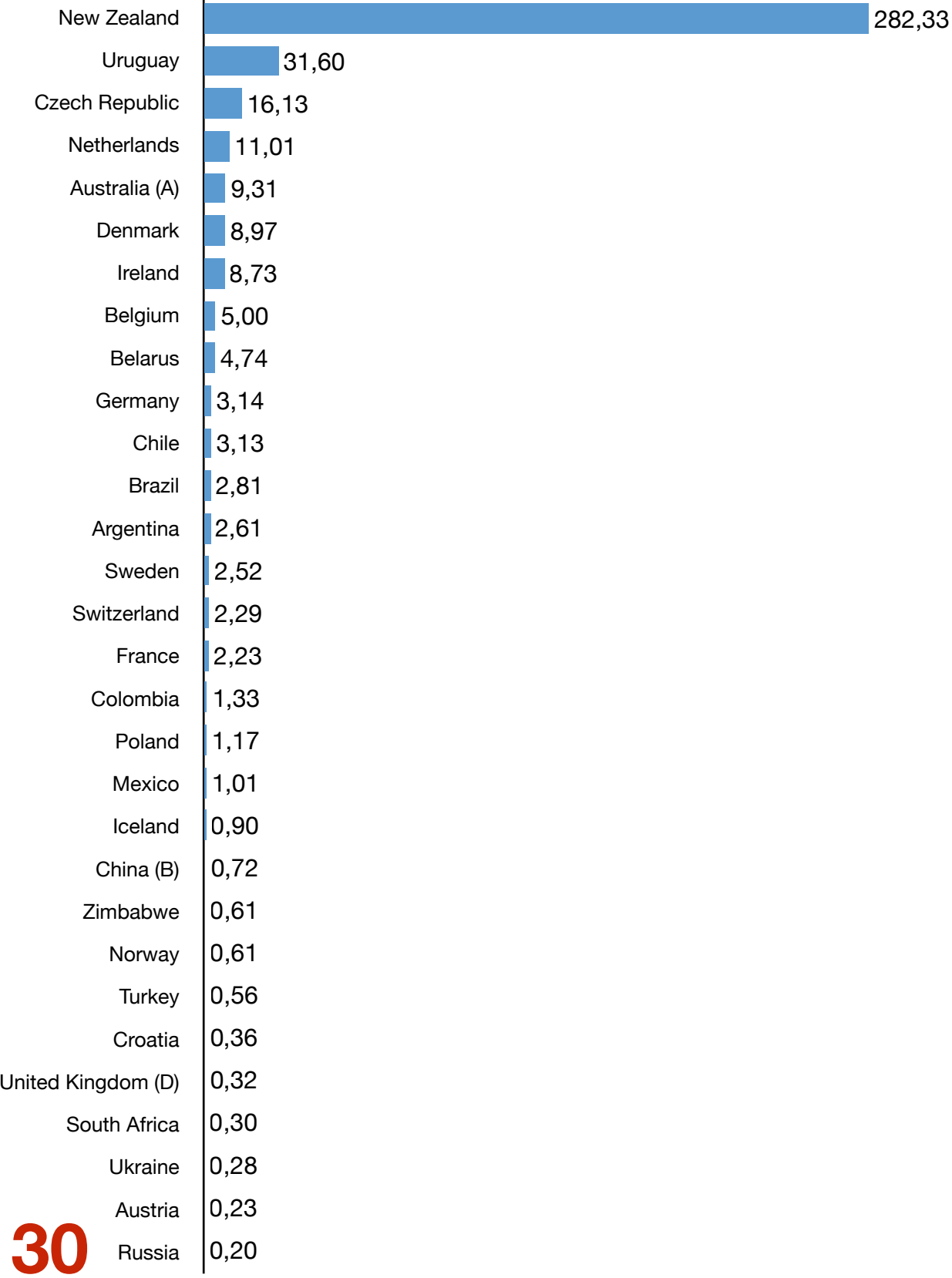


WLP PRODUCTION

TOTAL



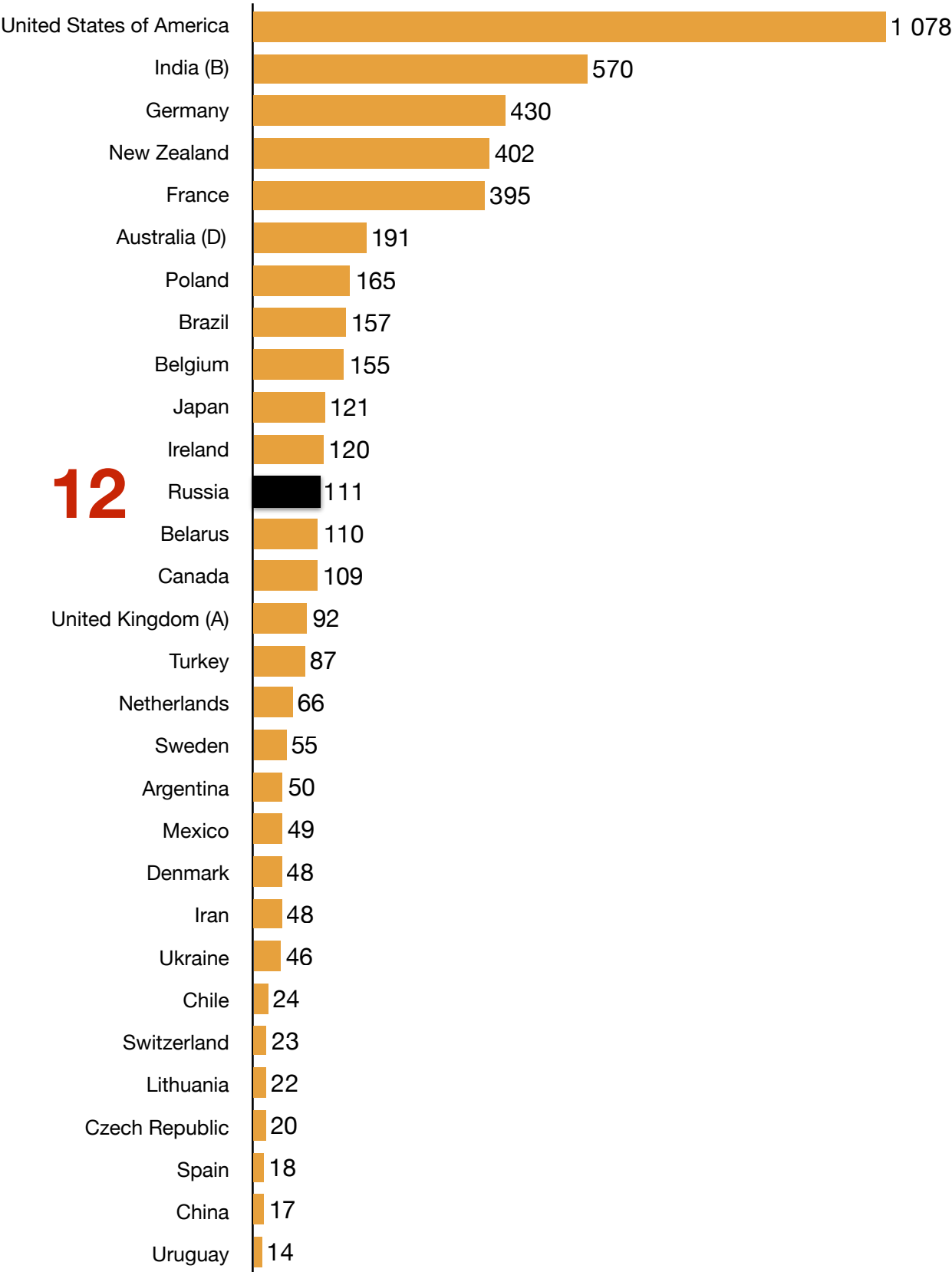
PER CAPITA



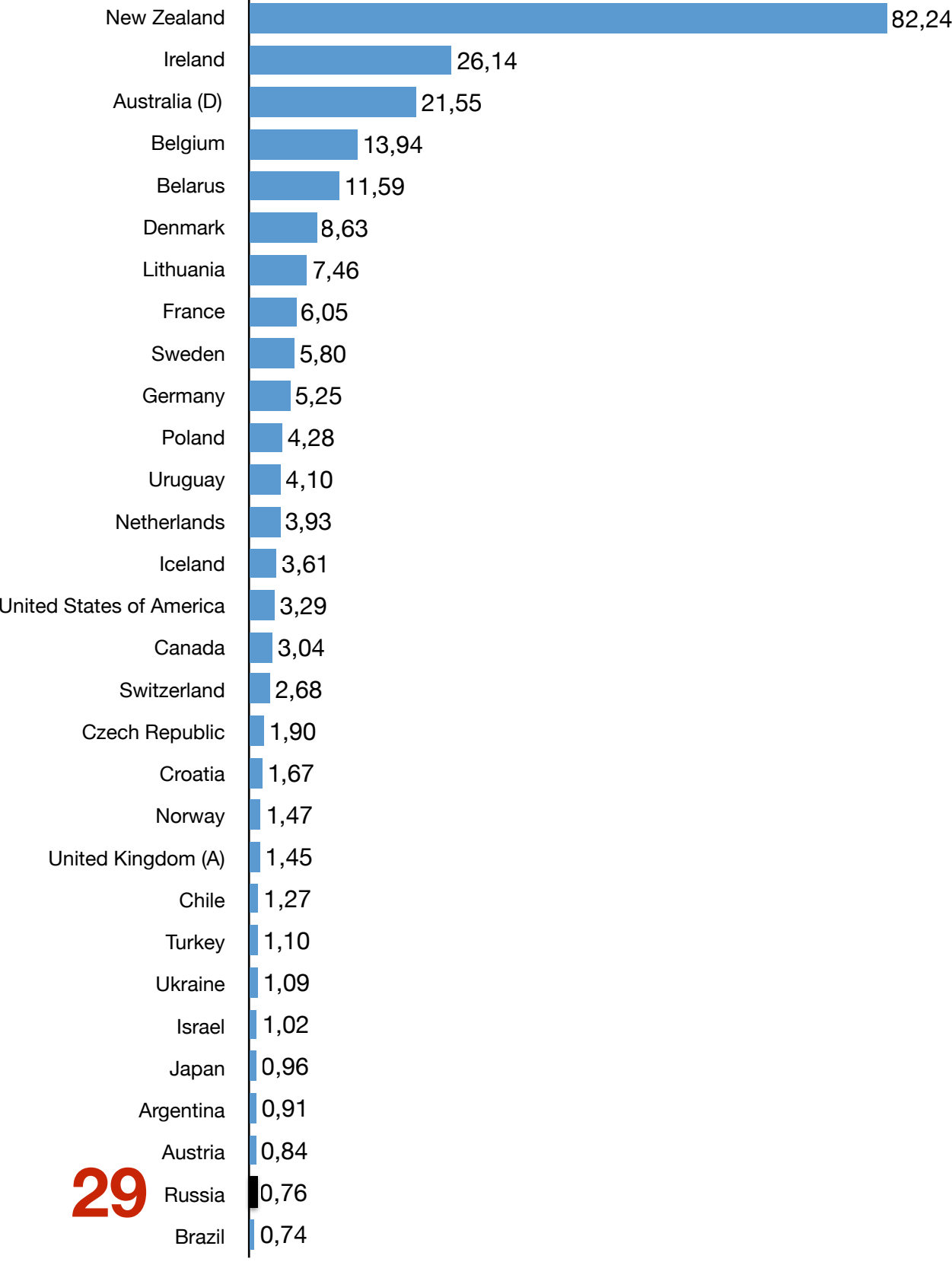


SMP PRODUCTION

TOTAL



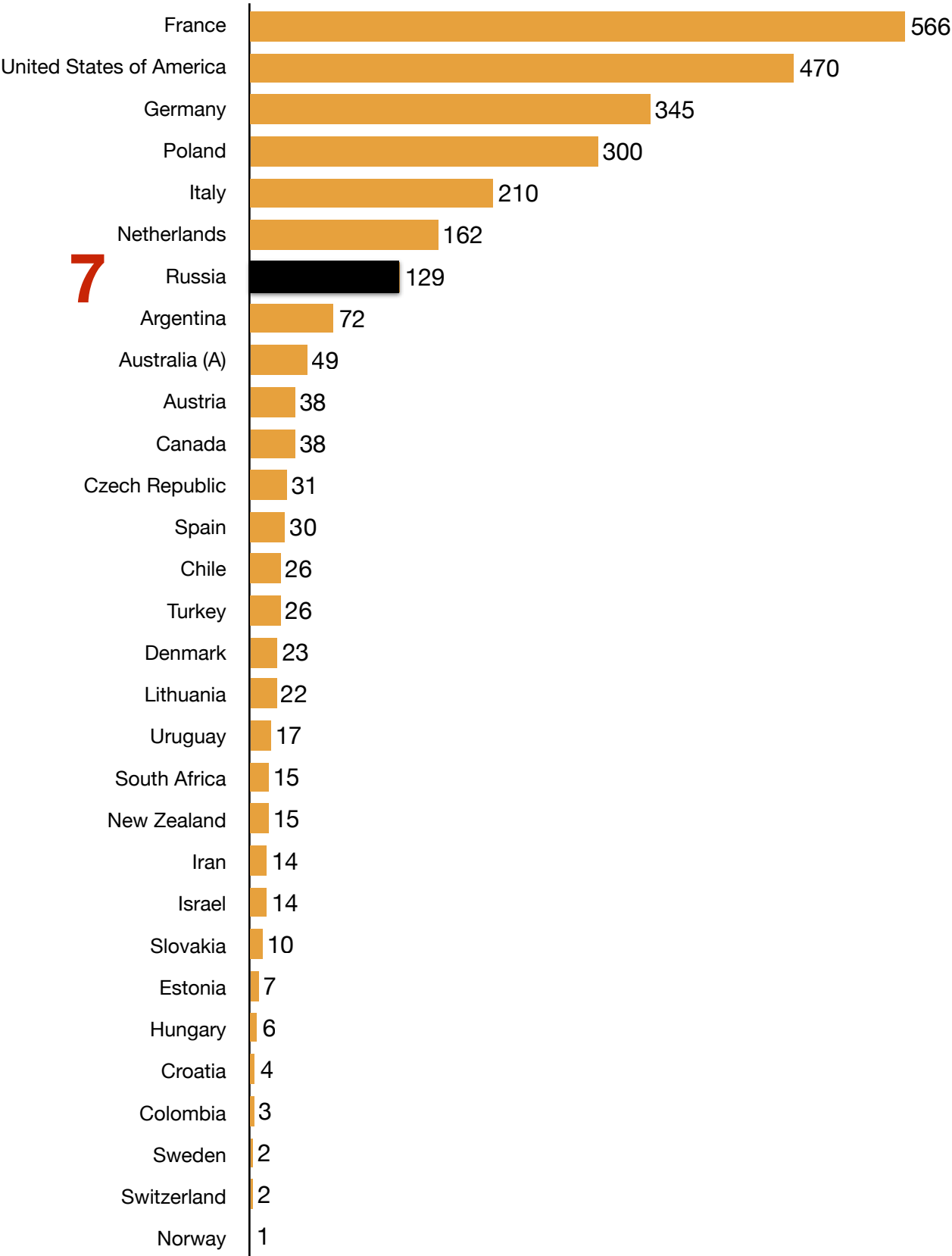
PER CAPITA



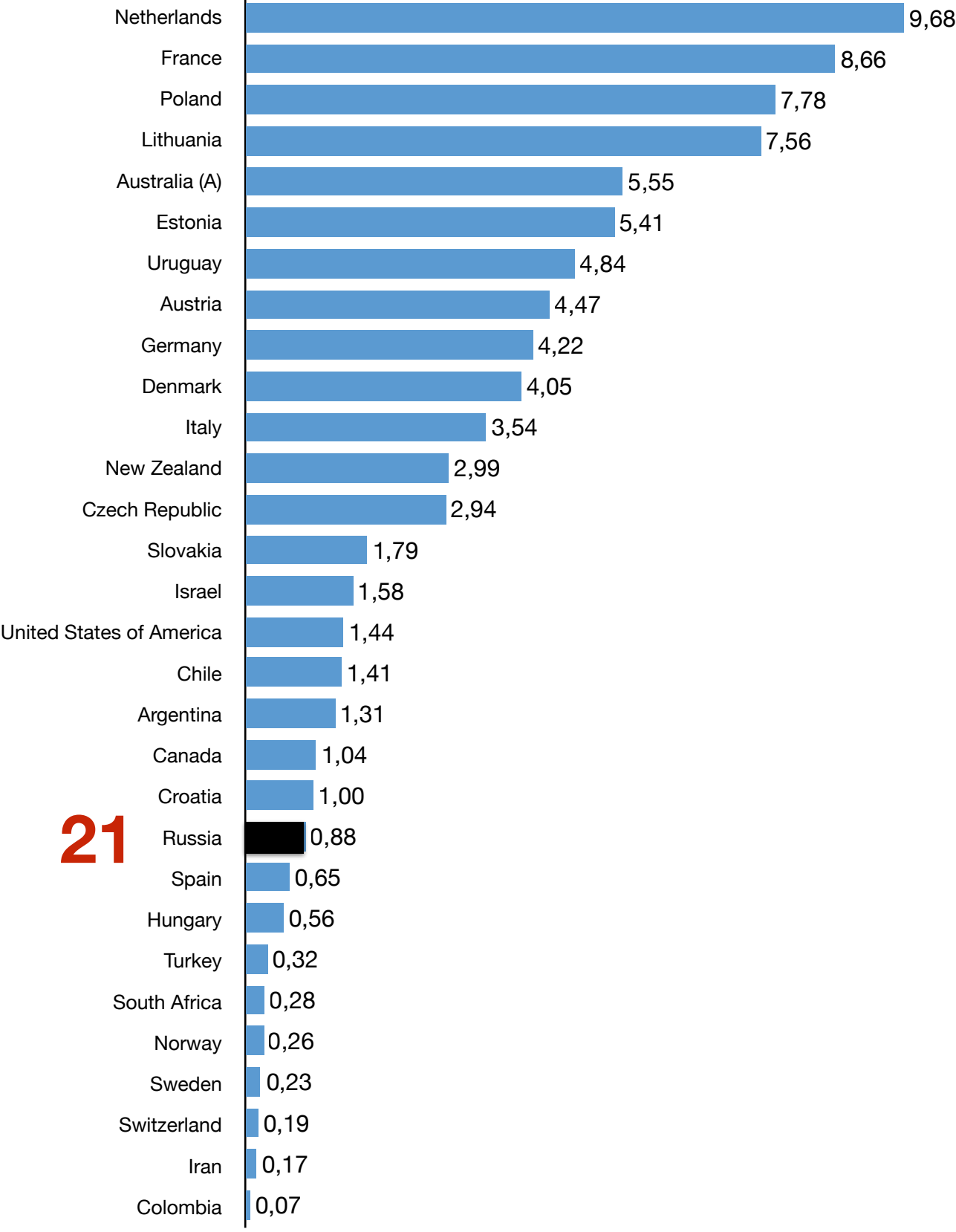


WHEY POWDER PRODUCTION

TOTAL



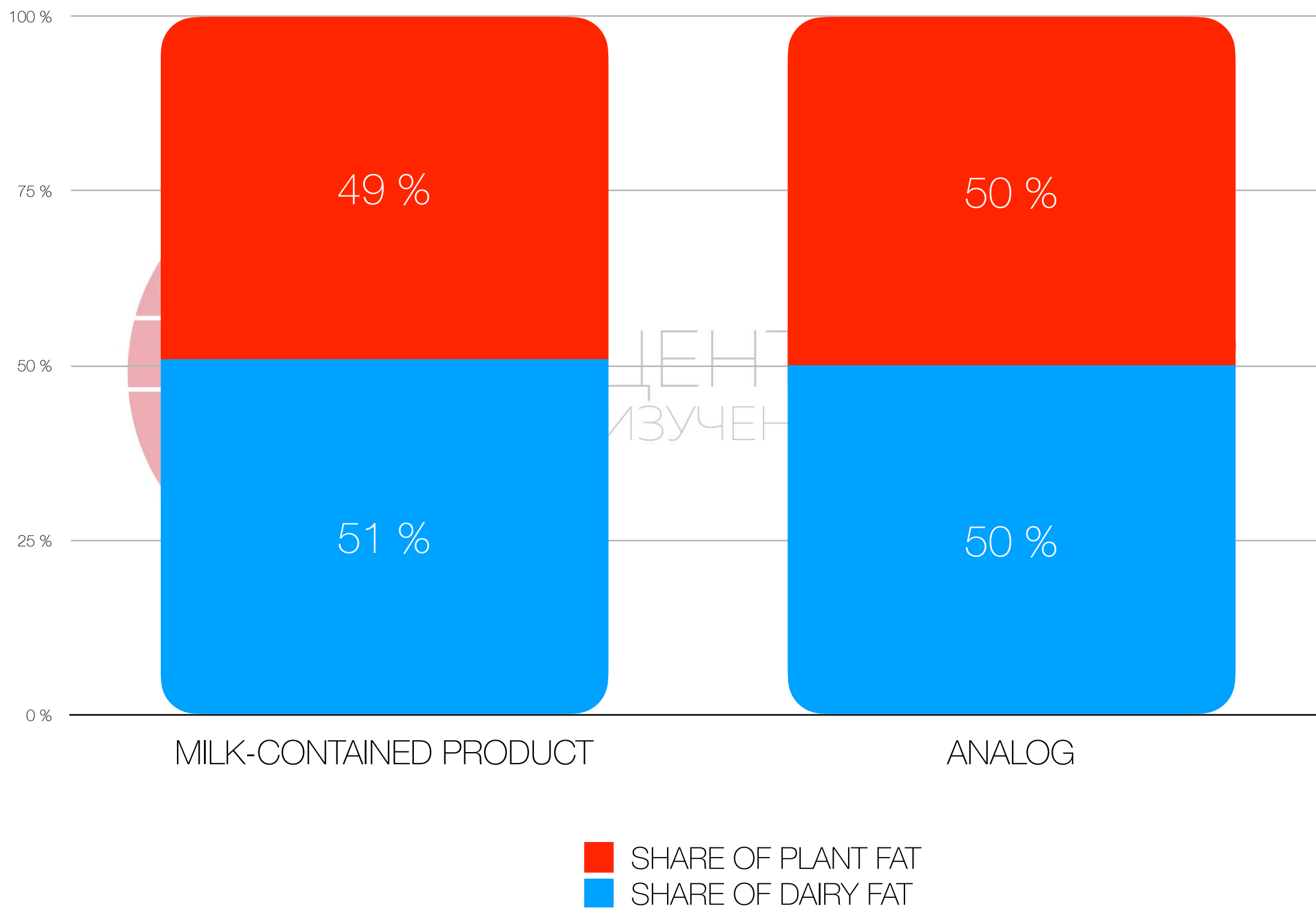
PER CAPITA





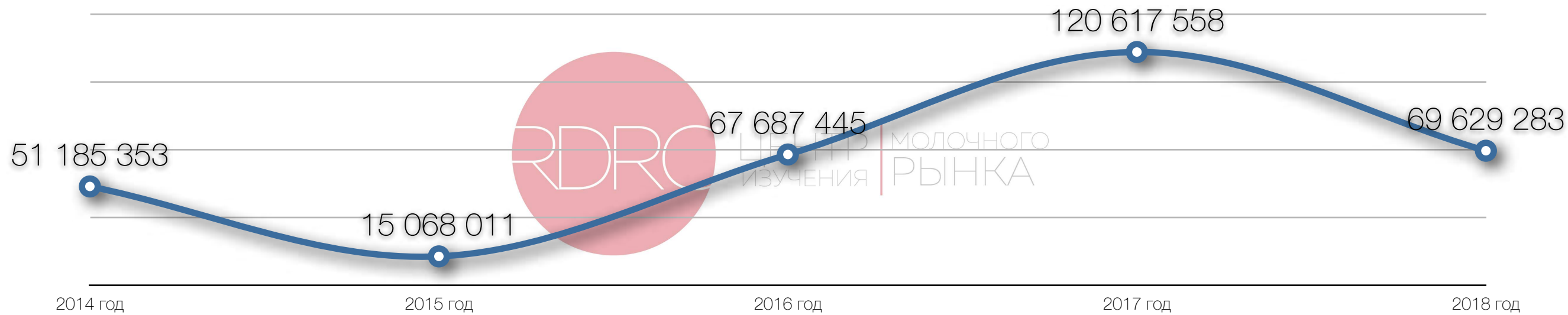
MILK

SUBSTITUTION

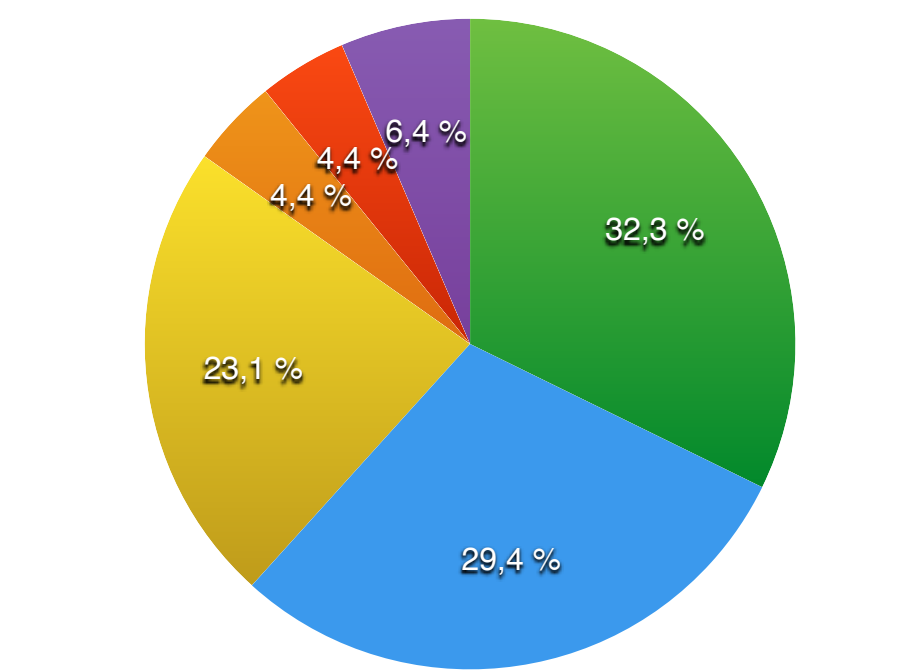




ANALOG CHEESE PRODUCTS IMPORT TO RUSSIA

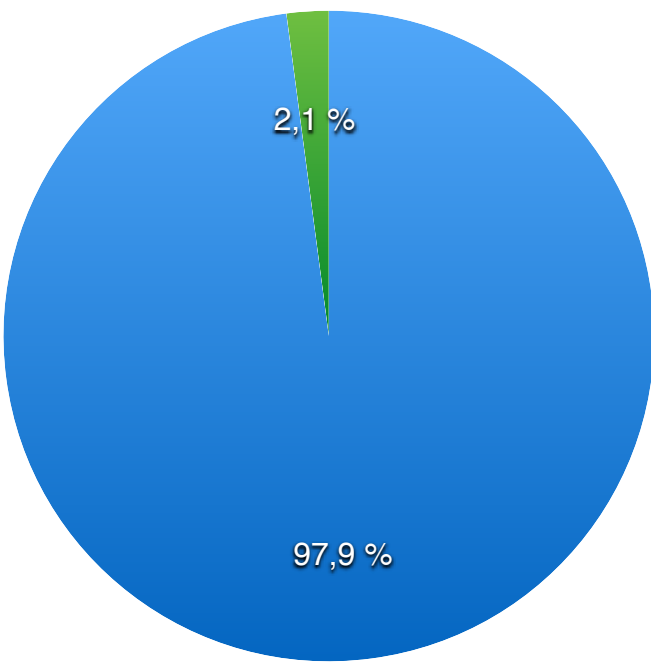


IMPORT 2014



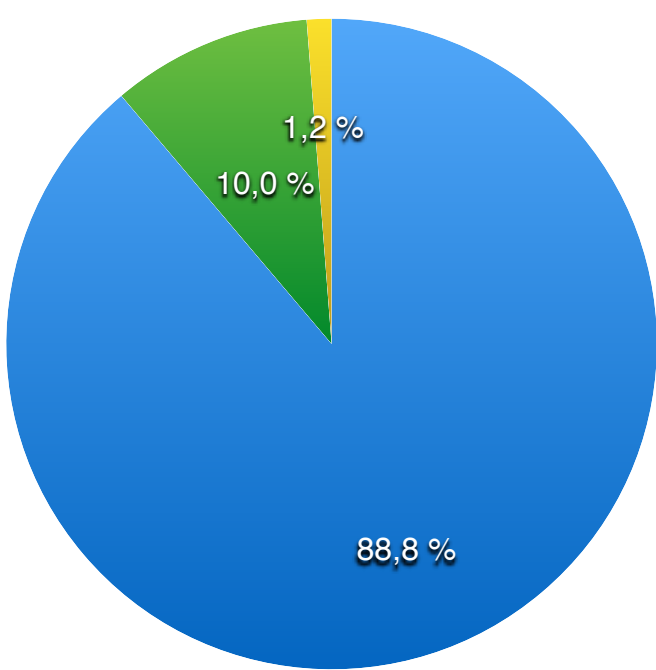
UA-UKRAIN BY-BELARUS PL-POLAND DK-DENMARK
DE-GERMANY OTHERS

IMPORT 2017



BELARUS OTHERS

IMPORT 2018



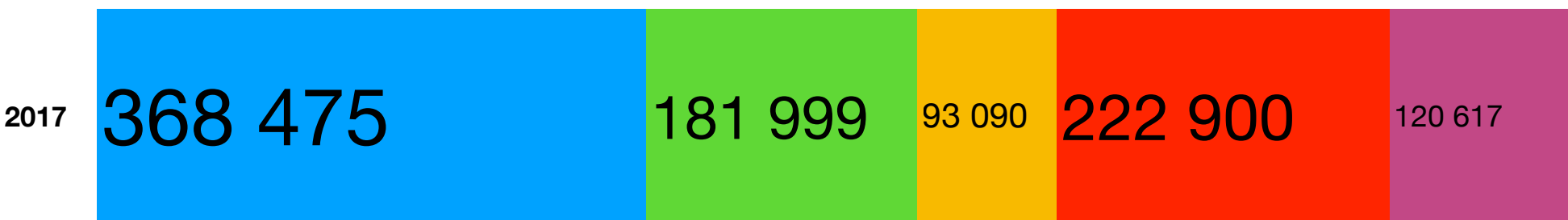
BELARUS SERBIA
OTHERS



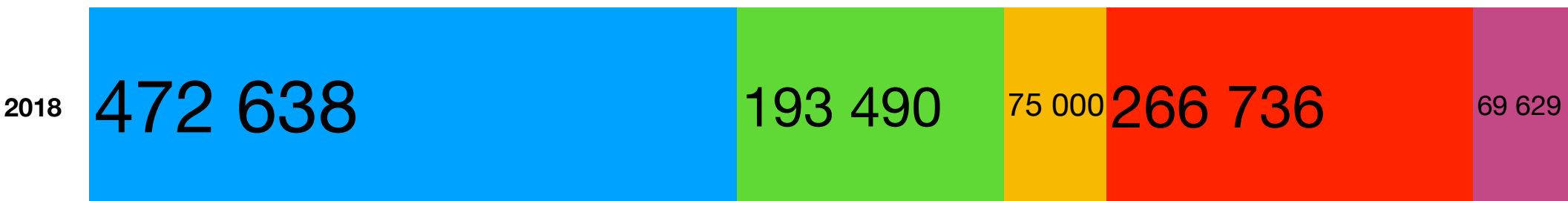
CHEESE SURPLUS



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



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



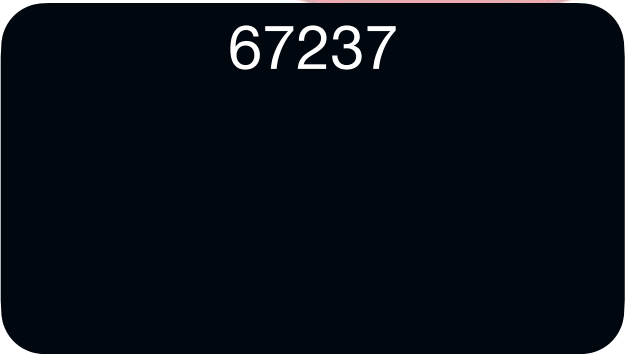
TOTAL: 1 077 493 T,
OR 7,34 KG. PER CAPITA

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



CHEESE SURPLUS

EXPORT
SUPLUS





THE BIGGEST PLAYERS



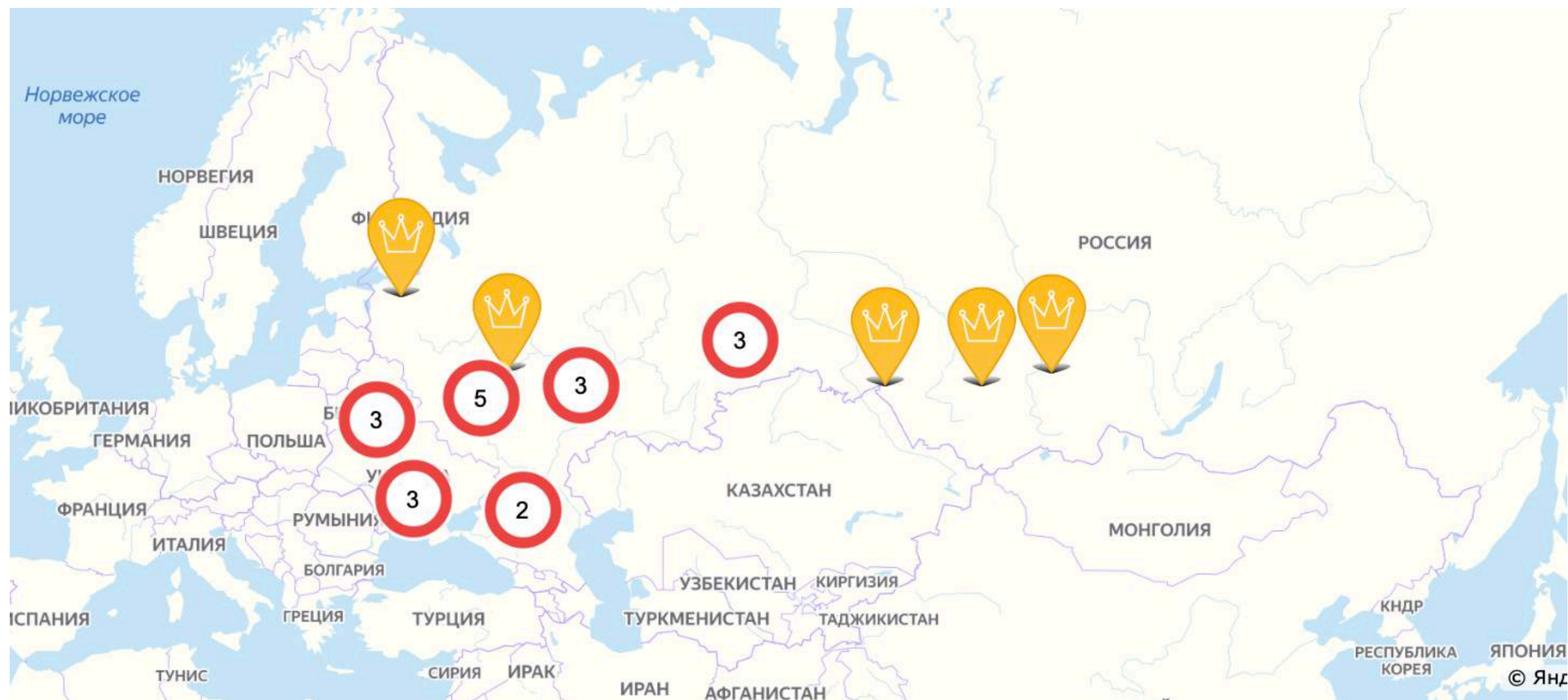
DANONE
ONE PLANET. ONE HEALTH

1 place

1 474 197 tons of milk processed

17 dairies

1 farm





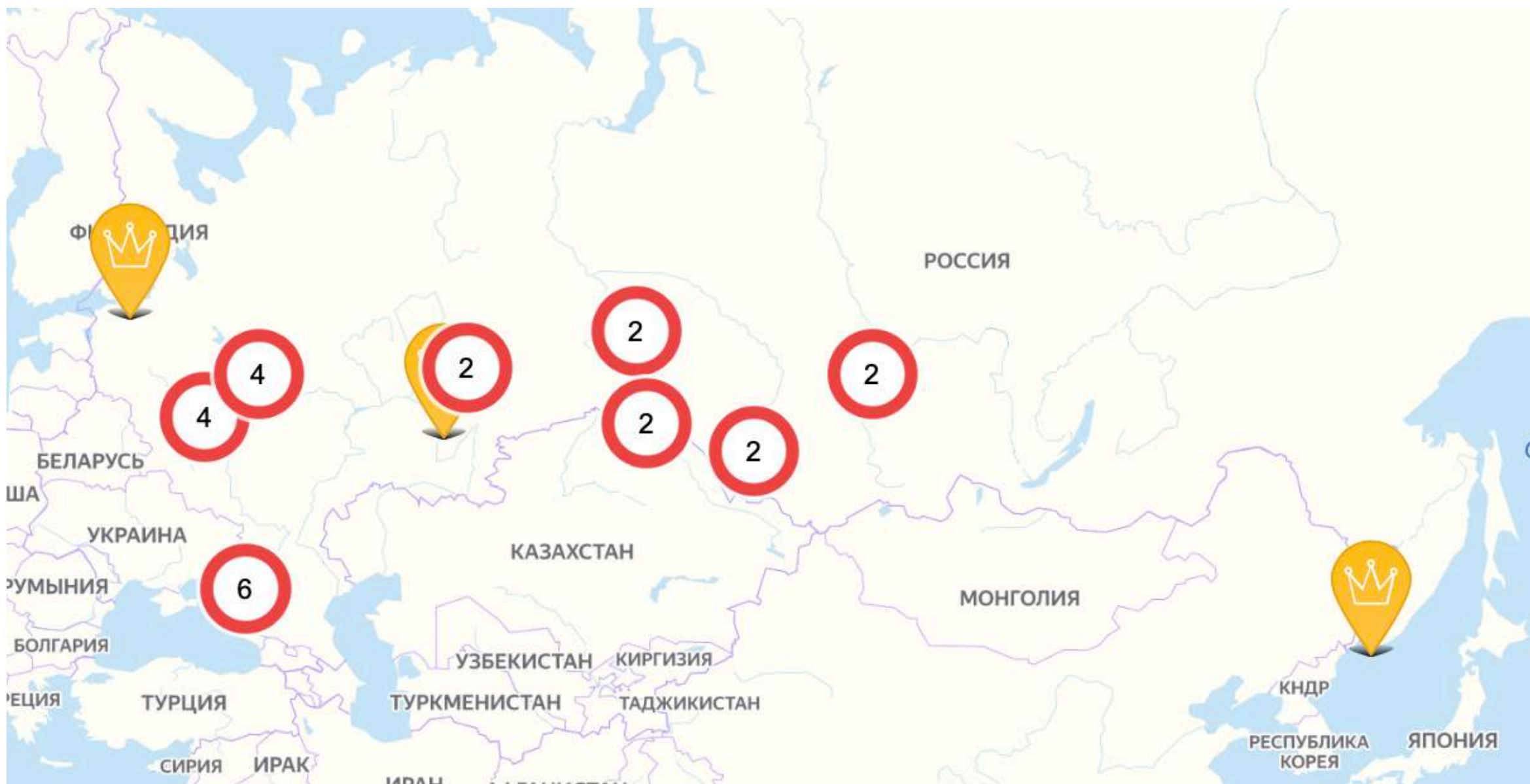
PEPSICO

2 place

1 313 319 tons of milk processed

14 dairies

2 farms





MOLVEST

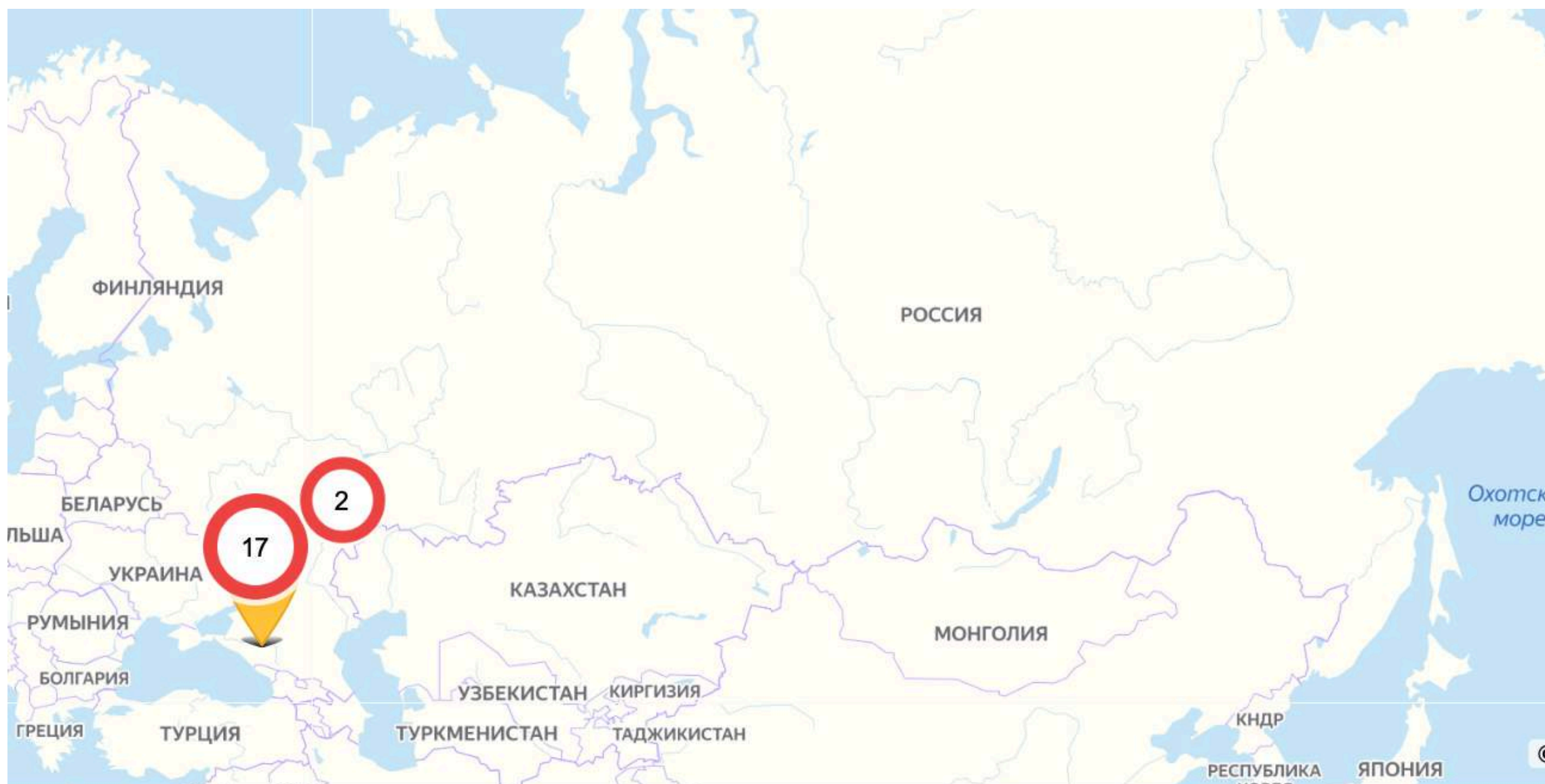
3 place

494 130 tons of milk processed

10 dairies

7 farms

72 642 tons of milk produced





**KOMOS
GROUP**

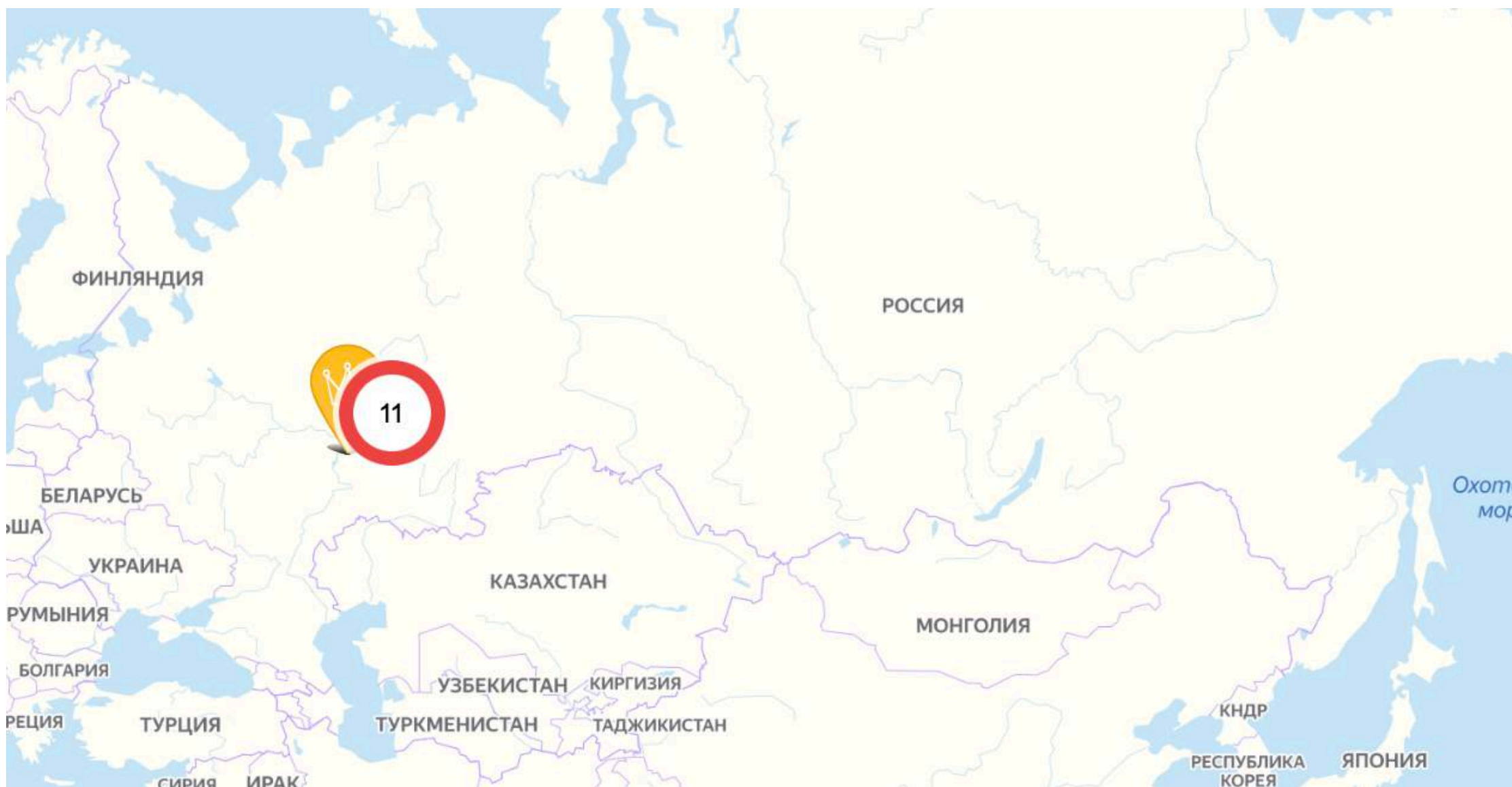
4 place

428 010 tons of milk processed

7 dairies

5 farms

42 484 tons of milk produced





**STATE
PROPERTY**

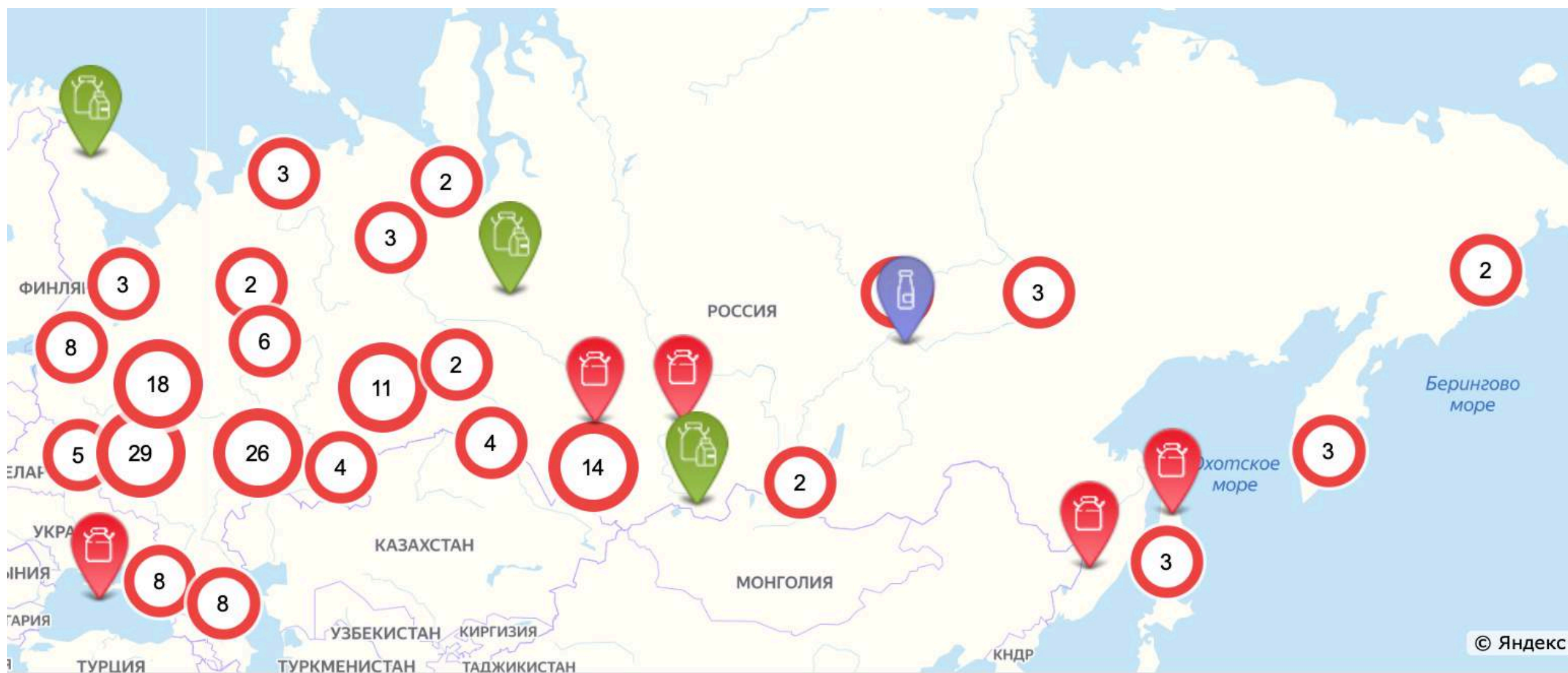
5 place

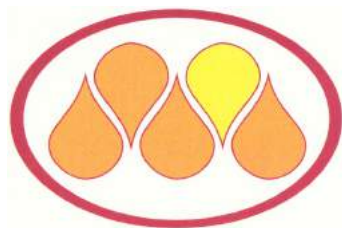
340 622 tons of milk processed

55 dairies

155 farms

**474 560 tons of milk
produced**





UKMP

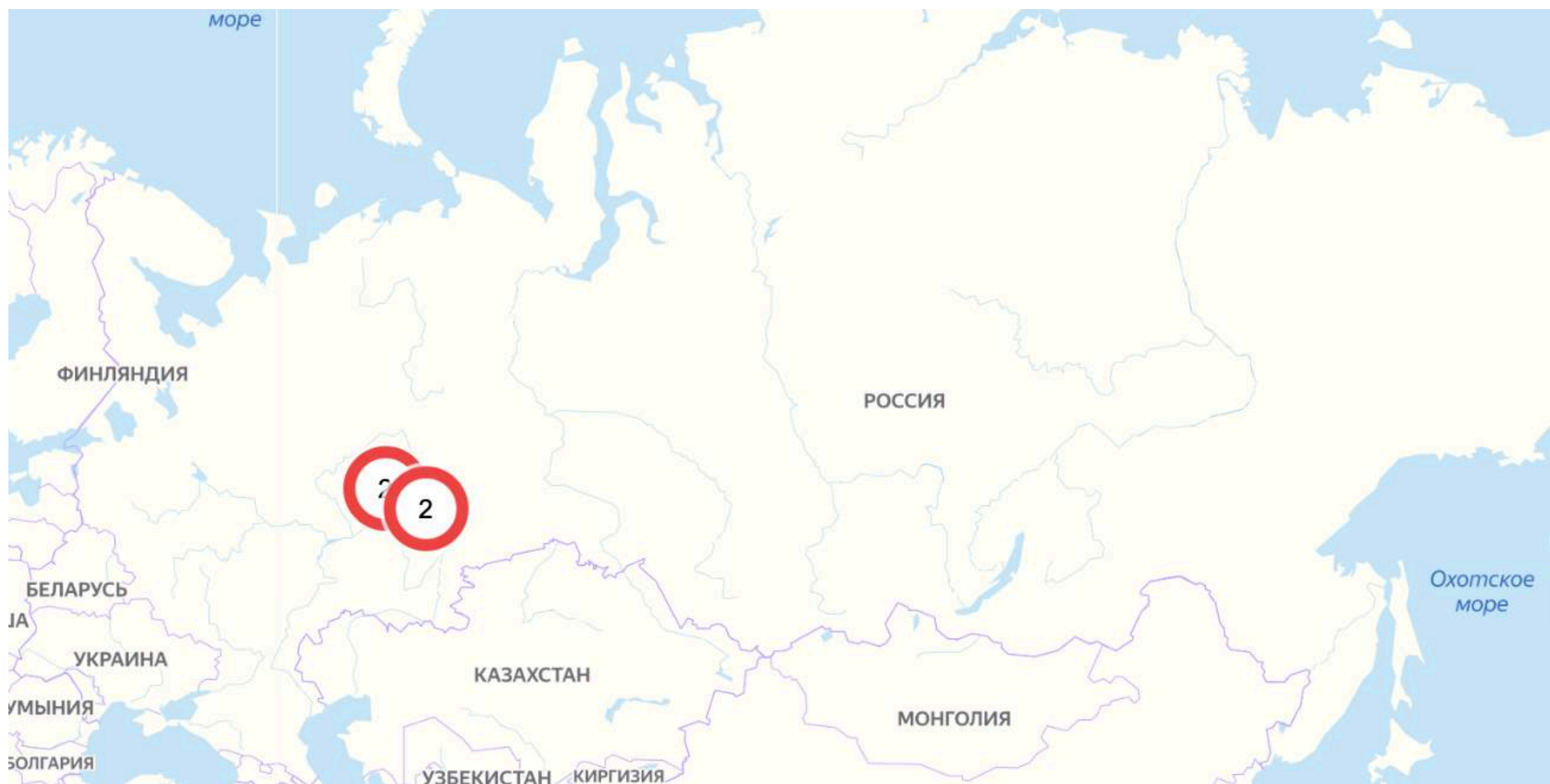
6 place

317 351 tons of milk processed

3 dairies

1 farm

7 250 tons of milk produced





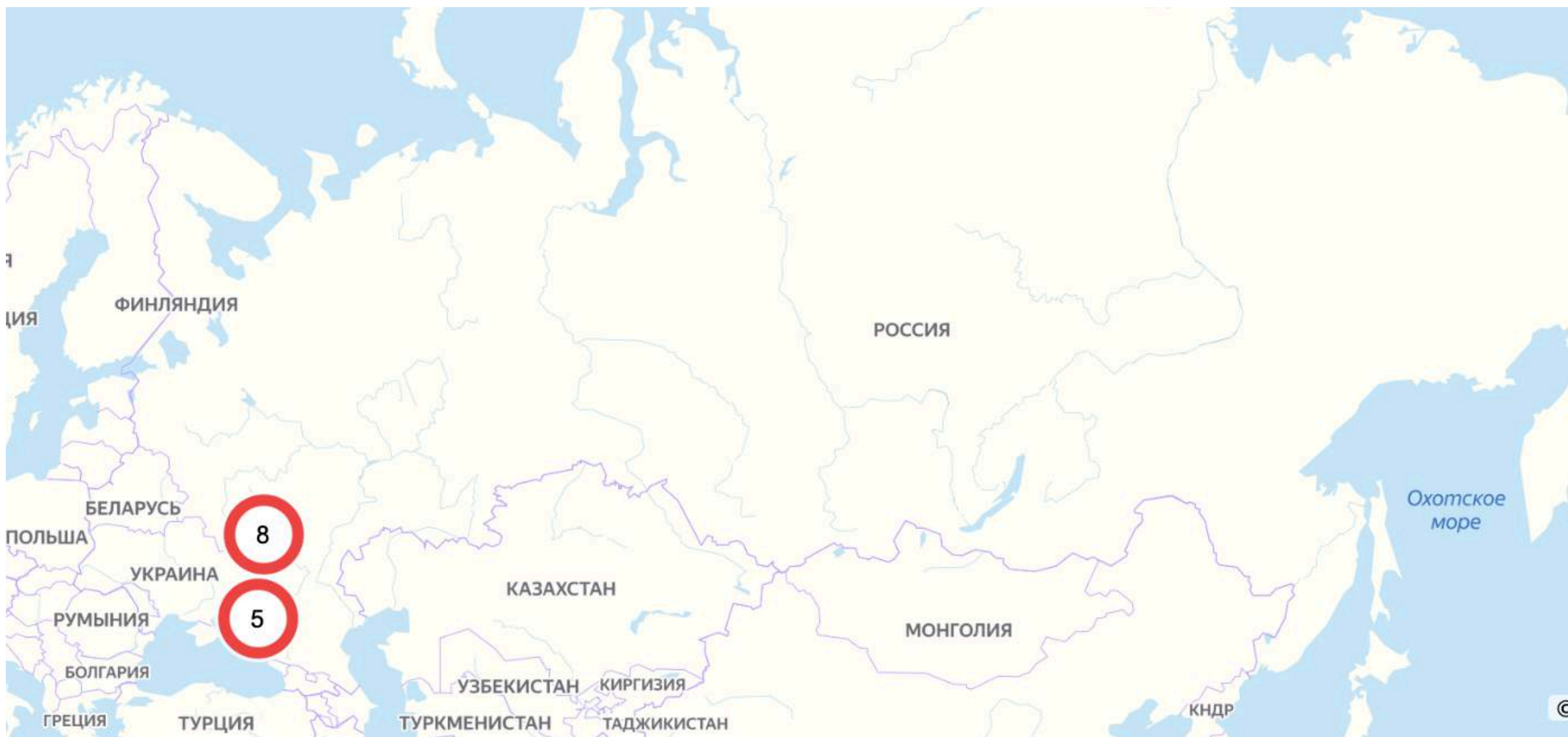
7 place

275 043 tons of milk processed

2 dairies

8 farms

70 875 tons of milk produced





8 place

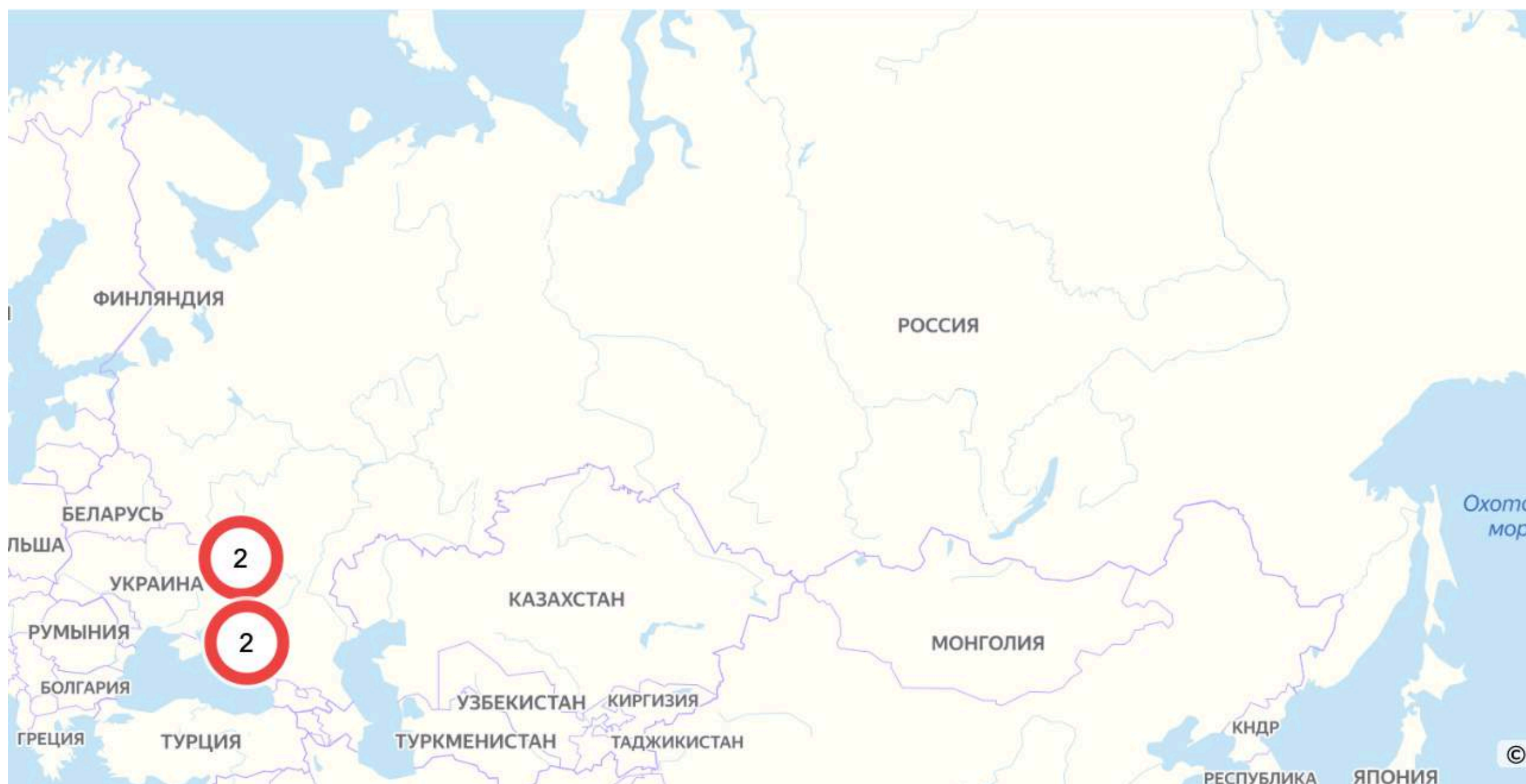
260 284 tons of milk processed

3 dairies

1 farm

5 835 tons of milk produced

RENNA





9 place

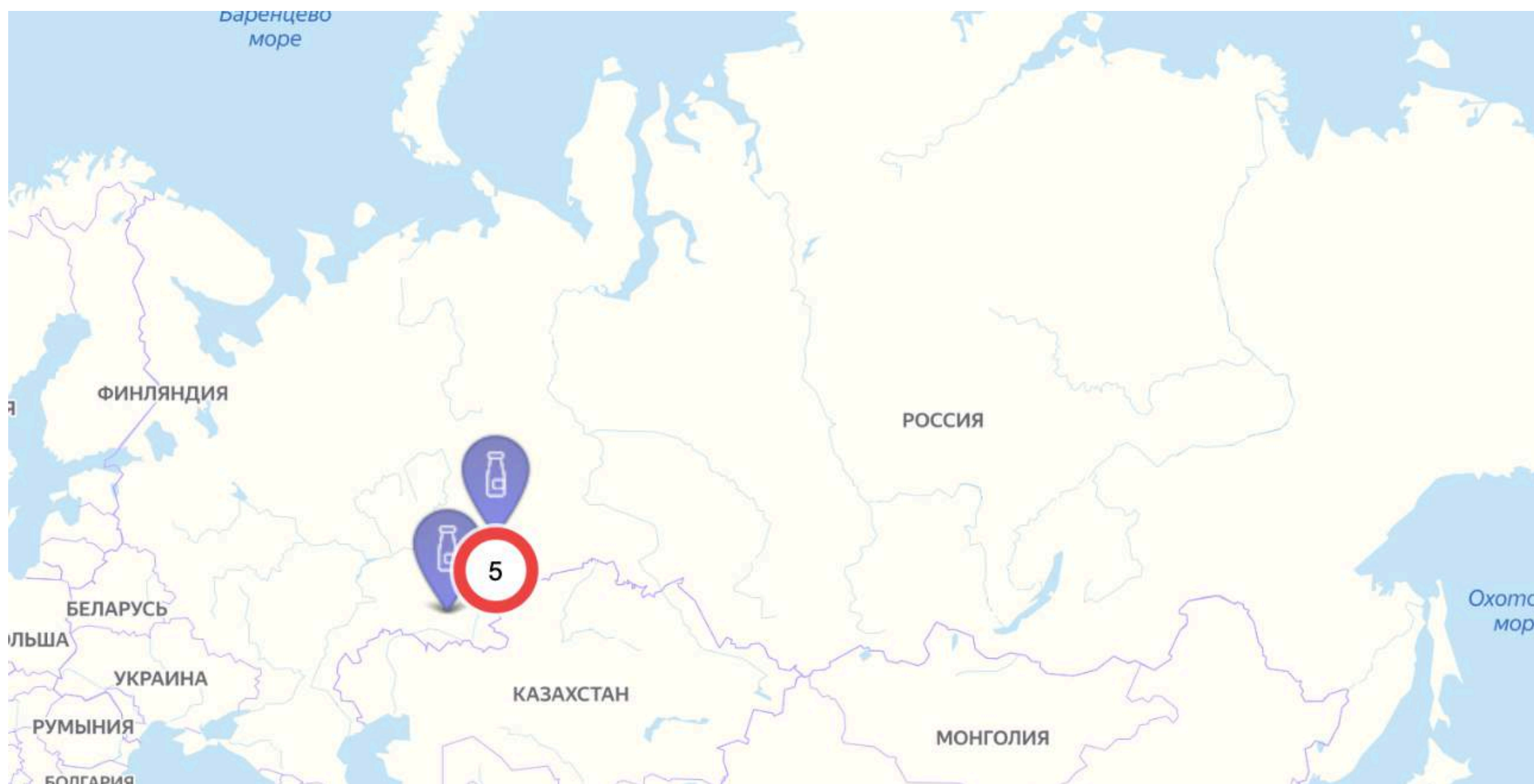
256 612 tons of milk processed

6 dairies

1 farm

5 500 tons of milk produced

ROSMOL





**BARNAULSKIY
DAIRY**

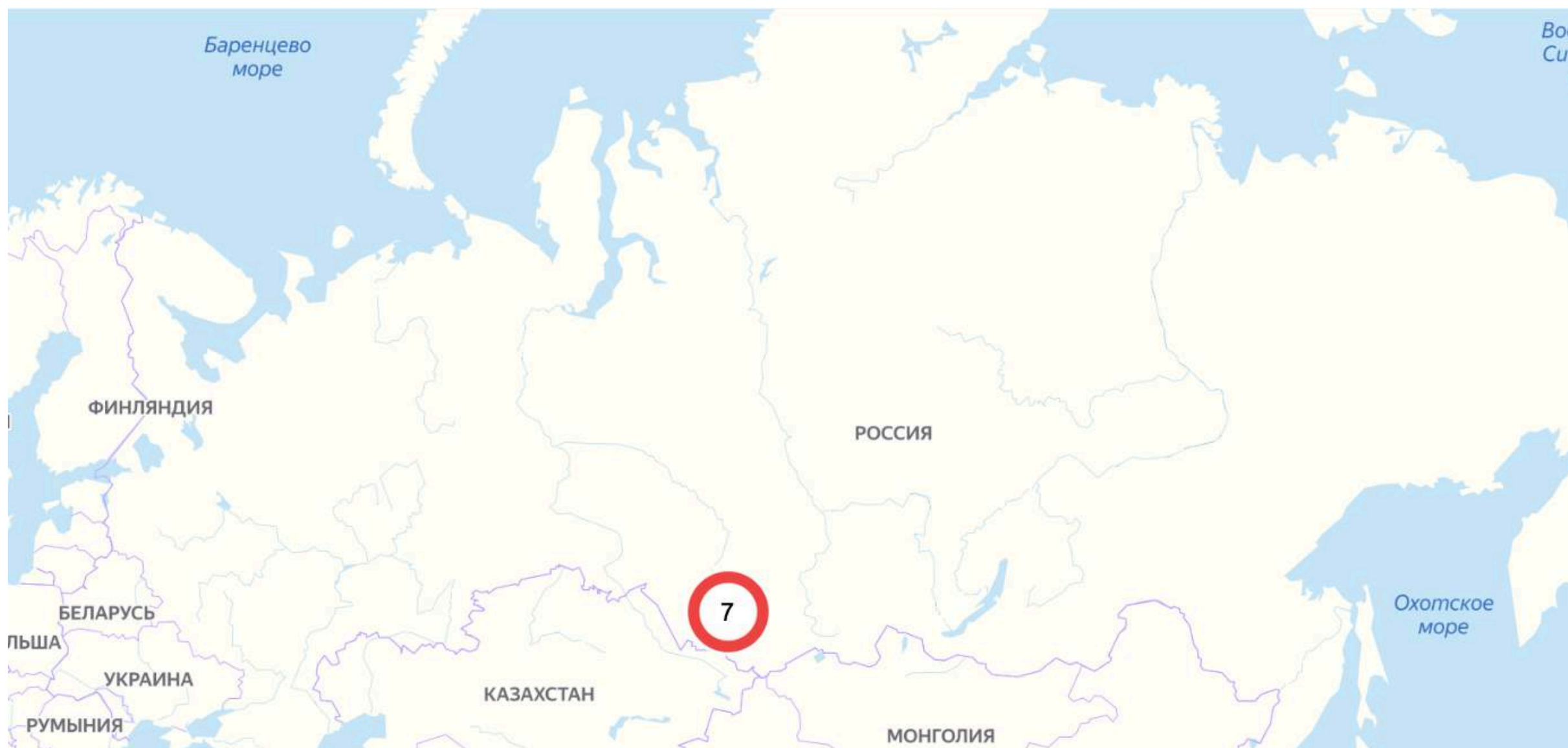
10 place

229 725 tons of milk processed

6 dairies

1 farm

5 500 tons of milk produced





THE BIGGEST
MILK PRODUCER



ЕКОНІВА
ЭКОНІВА

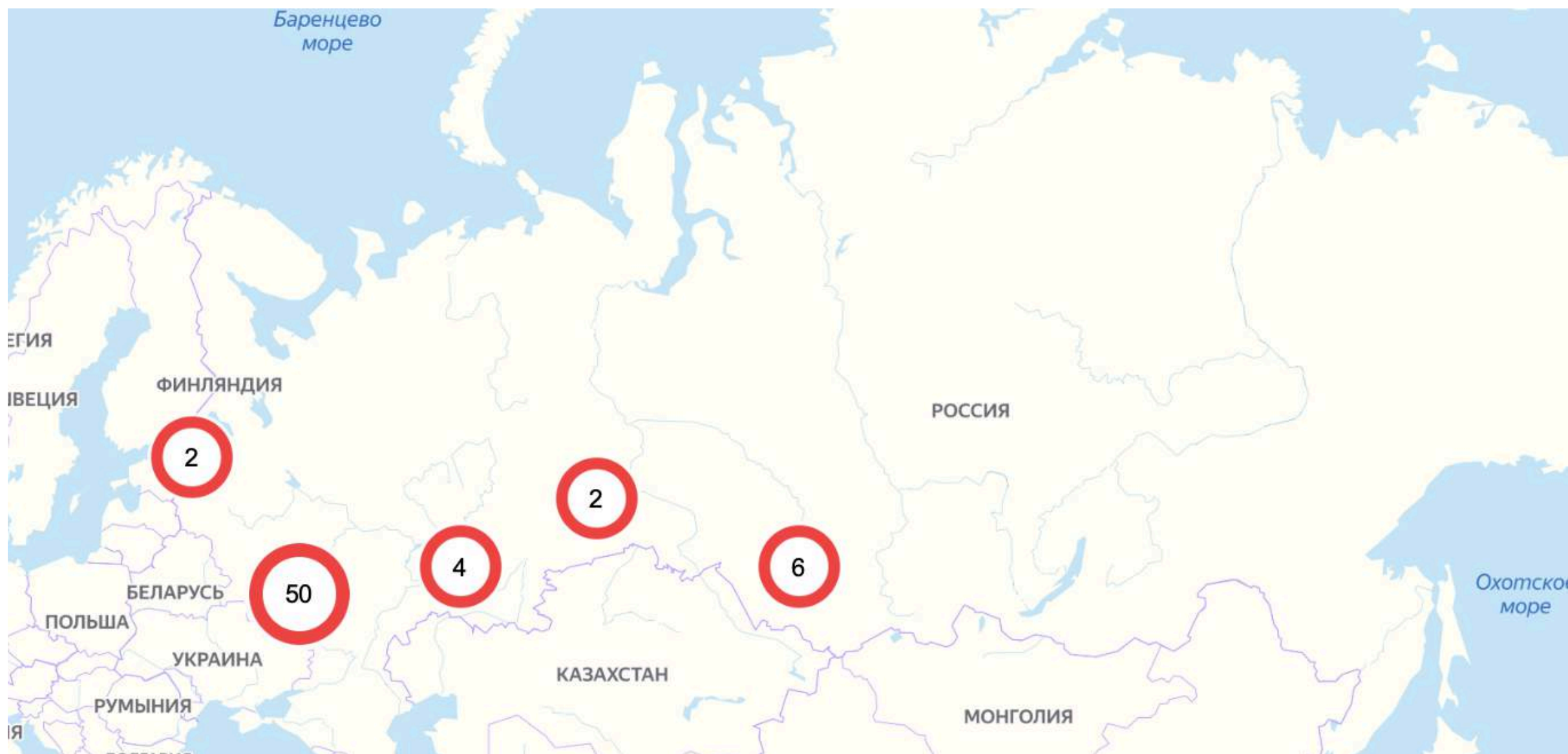
758 574 tons of milk produced in 2019

Plan for 2020: 1 million ton

60 dairy farms

4 dairies

57 633 tons of milk processed





13.06.19

WHAT HAPPENS

TODAY





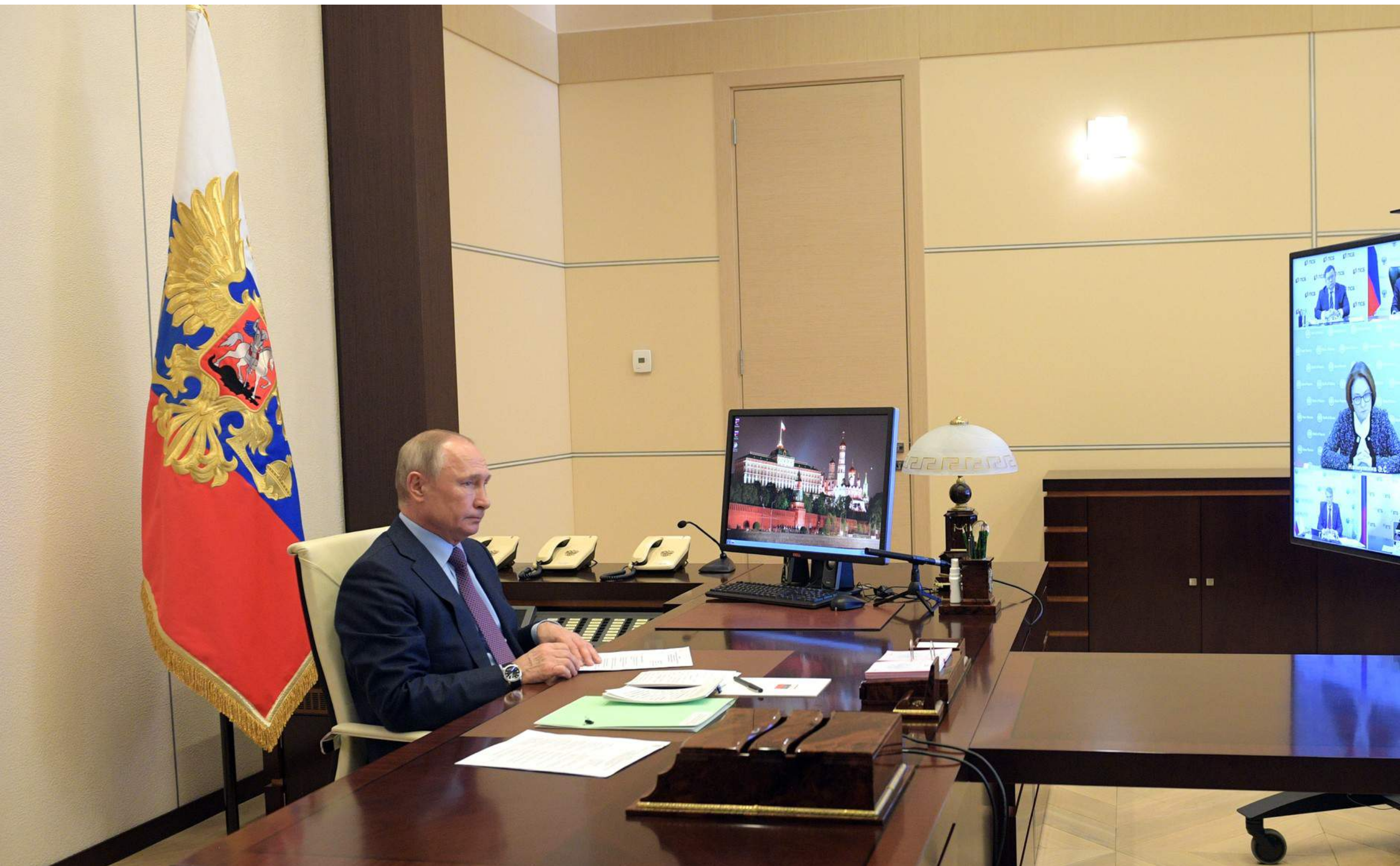
IN RUSSIA COVID PROCEEDS WITH COMPLICATIONS

RUSSIAN GOVERNMENT CREATED FINANCIAL CRISIS,
DROPPING OIL PRICES

PANDEMIC DISCOVERED ALL SOCIAL, POLITICAL
ECONOMIC PROBLEMS



HOW DID GOVERNMENT SUPPORT?





HOW DOES GOVERNMENT SUPPORT?



In the end of March Putin announced **self-isolation regime**, and **not working days**.

It is NOT quarantine, NOT emergency, NOT Lockdown

This «regime» allows government not to have responsibility and it doesn't mean Force Majeure.

Putin announced **tax holydays**.

It means: you can not to pay some of taxes right now but will have to pay all amount after quarantine cancellation

Putin announced that national banks will give loans for salary for employees with **0% rate**.

But most of employers are not able to get this kind of loans.

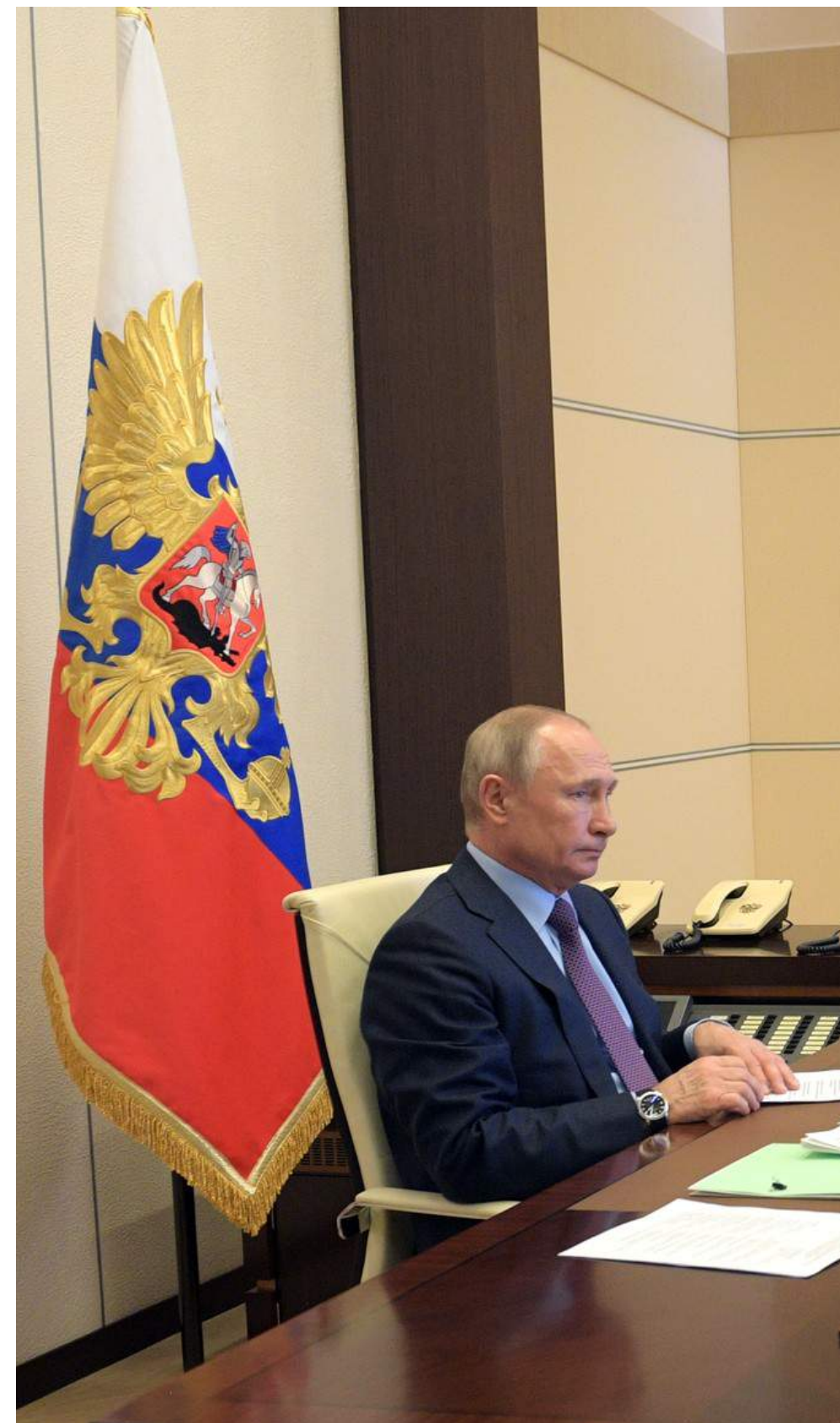
In the middle of April (after 1 month of «not working days») Putin announced that Government will **deliver about 200\$** to business for each not fired employee.

Business will have to pay taxes for this amount: 13% Personal Income Tax + 30,2% Insurance Premiums = **43,2%**.

Putin announced announced direct support:

just for children 3-16 YO: lump sum payment **140\$**.

Almost direct support to citizens.



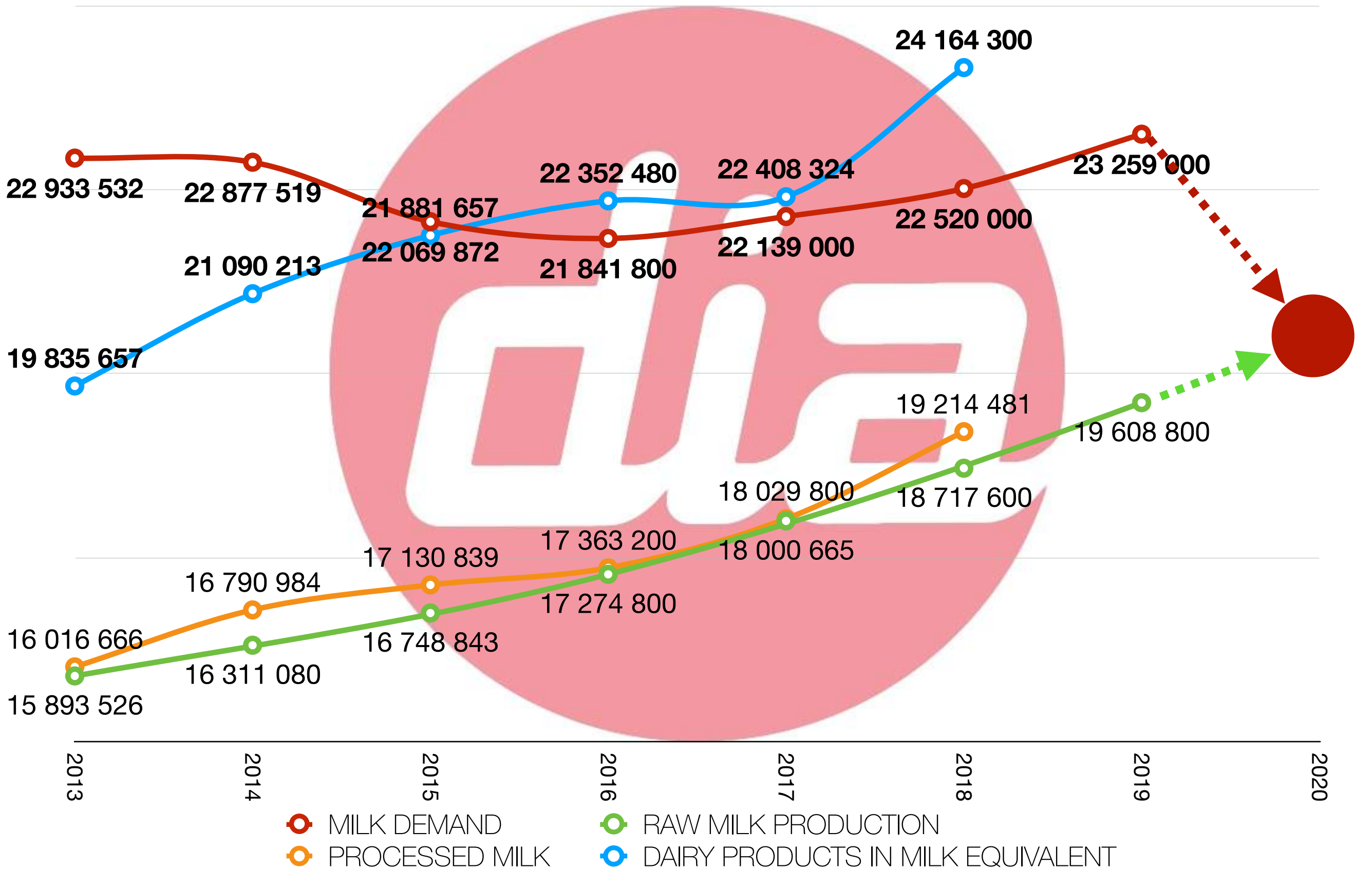


NO MONEY

NO CONSUMPTION



MILK CONSUMPTION

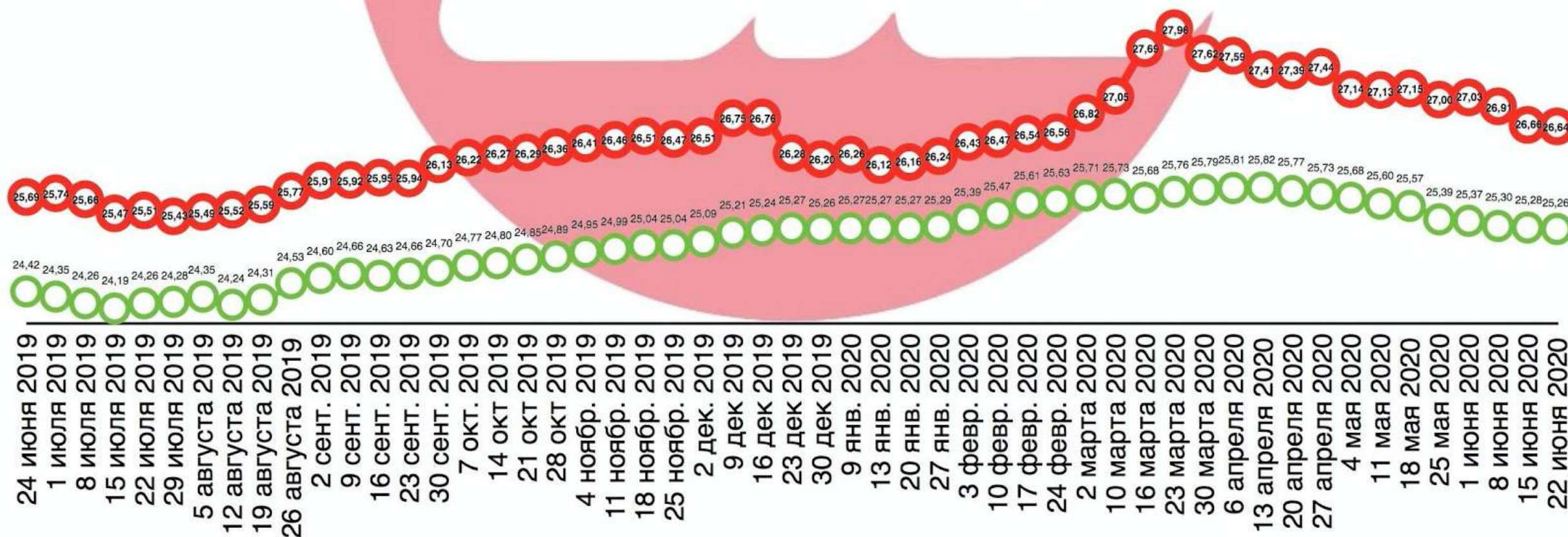




DROPPED OIL PRICES IS THE **HAPPINESS** FOR RUSSIAN DAIRY INDUSTRY



36,68\$ PER 100 KG



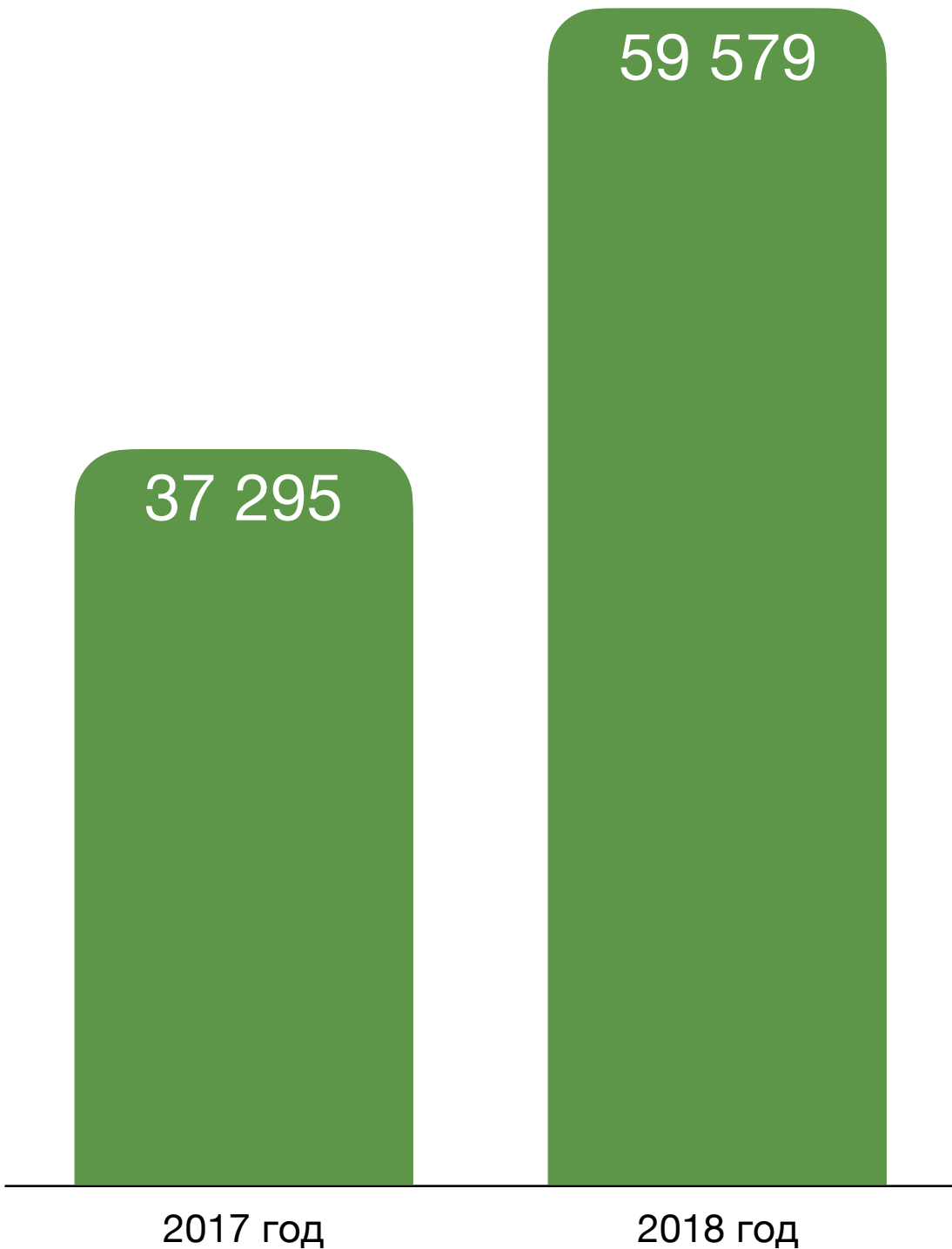


WINNER 2020



ЕКОНИВА
ЭКОНИВА

№60 IN TOP-100





ЕКОНИВА
ЭКОНИВА

VS





DEGLOBALISATION



WINNERS:

BIGGEST FARMERS WHO HAVE PROCESSING FACILITIES / COOPS

TRADITIONAL AND DAIRY PRODUCTS PRODUCERS.

LOCAL FARMERS WHO CAN PROCESS AND SELL THEIR PRODUCTS LOCALLY.

LOSSERS

TRADERS / IMPORTERS

SUPPLIERS FOR HORECA AND SOCIAL INSTITUTIONS

DARIES WHO HAVE NOT ITS OWN RAW MILK BASE



THE MAIN
LOOSER
BELARUS



THE END

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