

UPDATES ON RUSSIAN DAIRY PRODUCTS MARKET

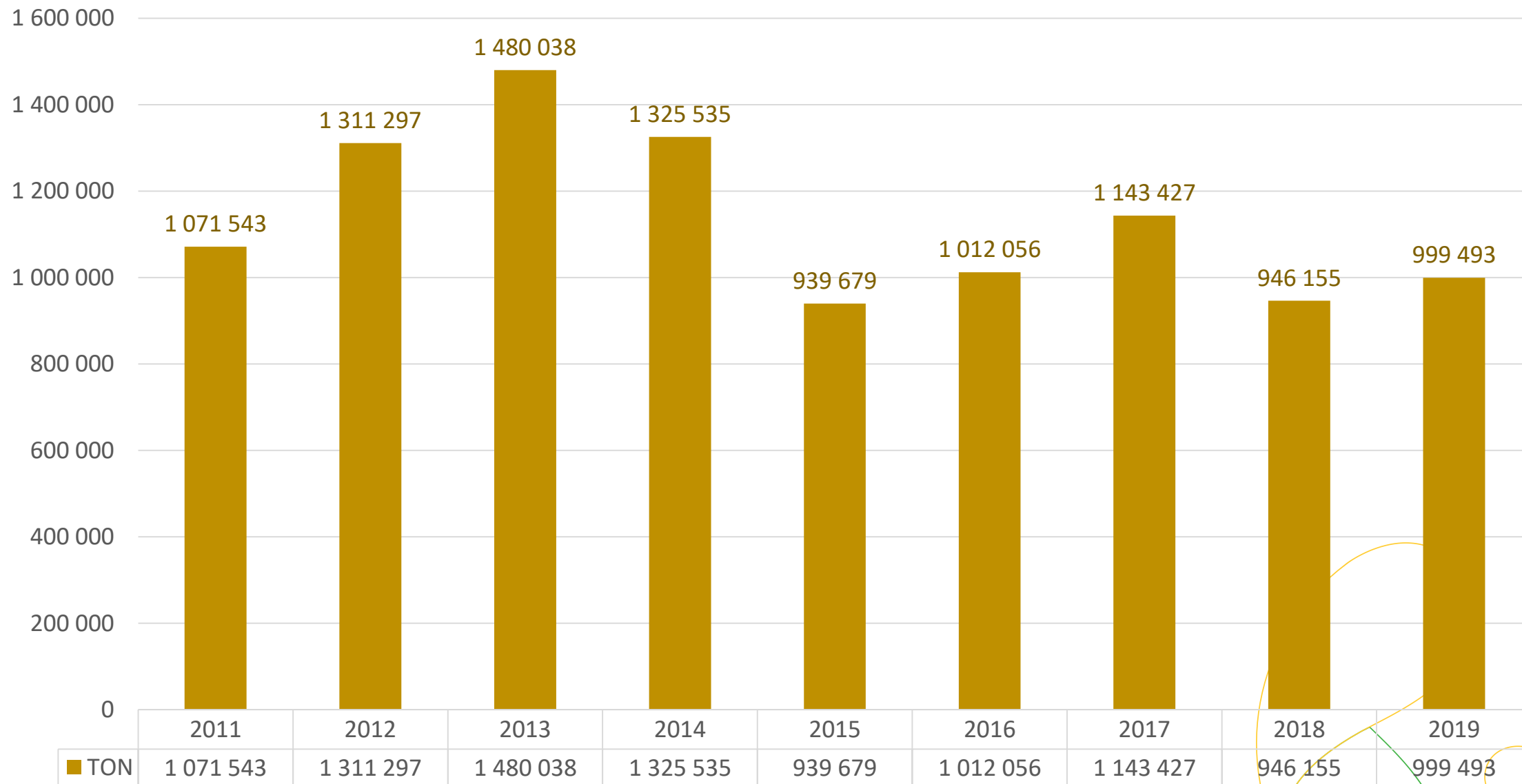


ATUALIZAÇÕES SOBRE O MERCADO RUSSO DE LACTICÍNIOS

23.Jun.2020

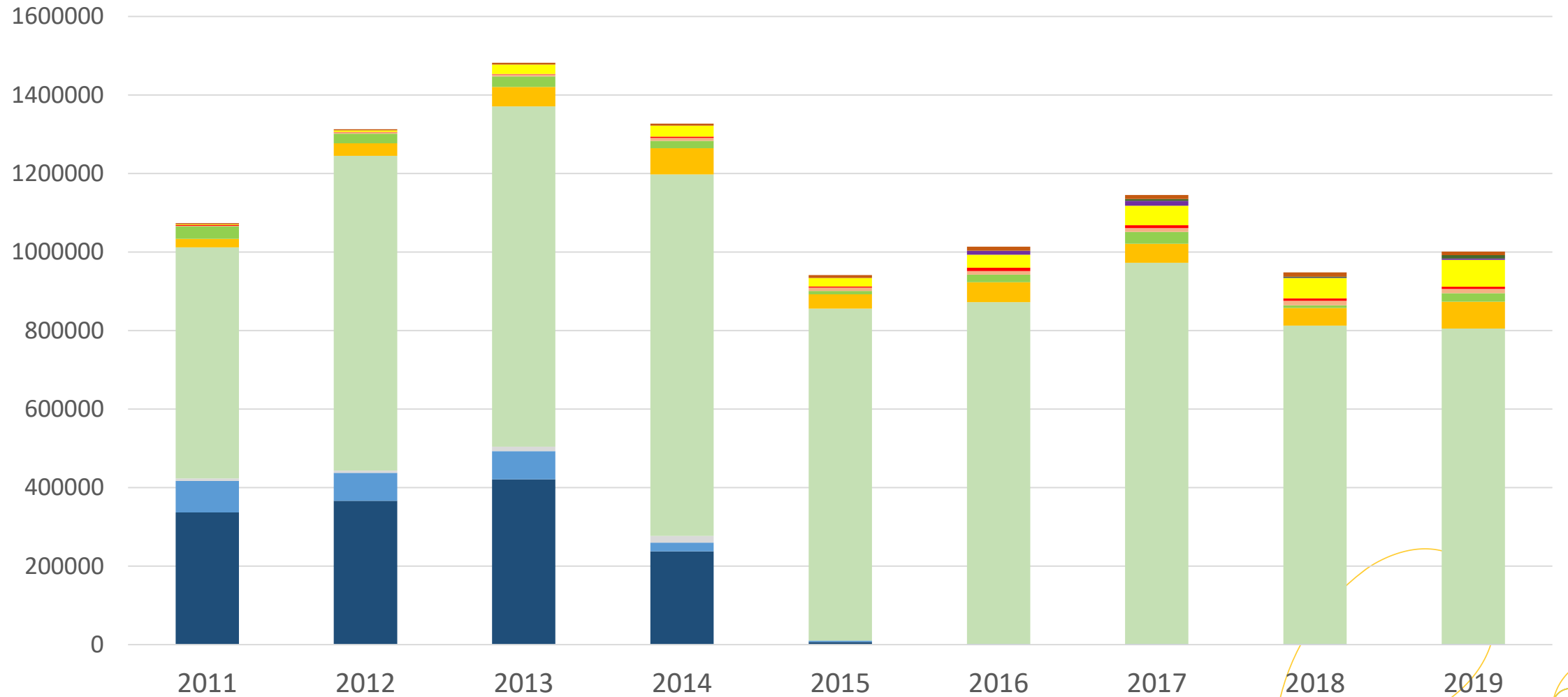


RUSSIAN MILK PRODUCTS IMPORTS (2011-2019, TONS)
IMPORTAÇÕES RUSSAS DE LACTICÍNIOS (2011-2019, TONS)



RUSSIAN MILK PRODUCTS IMPORTS (2011-2019, TONS)

IMPORTAÇÕES RUSSAS DE LACTICÍNIOS (2011-2019, TONS)



European Union

Ukraine

Australia

Belarus

South America

New Zealand

Serbia

Switzerland

Other CIS countries

Turkey

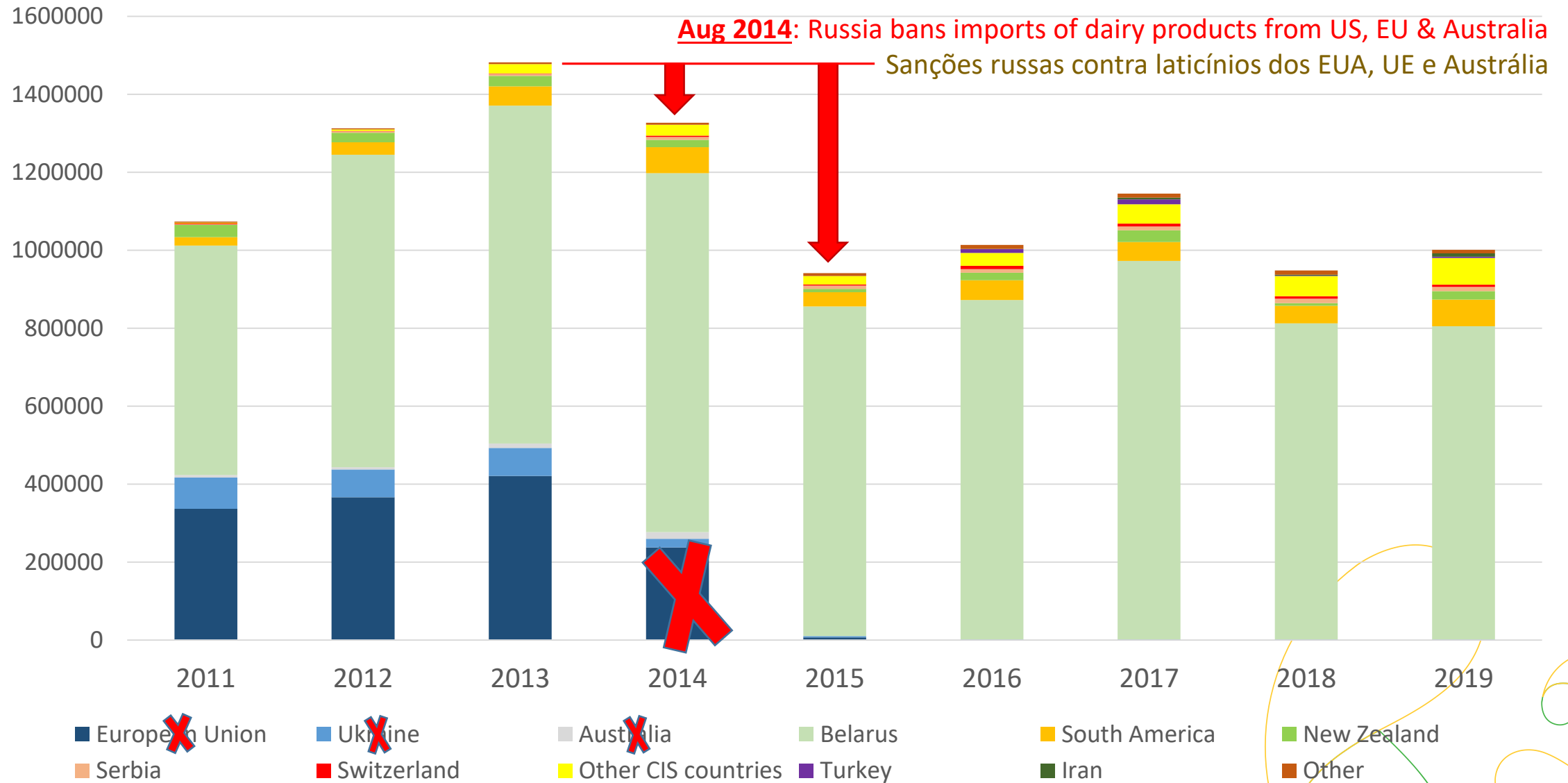
Iran

Other



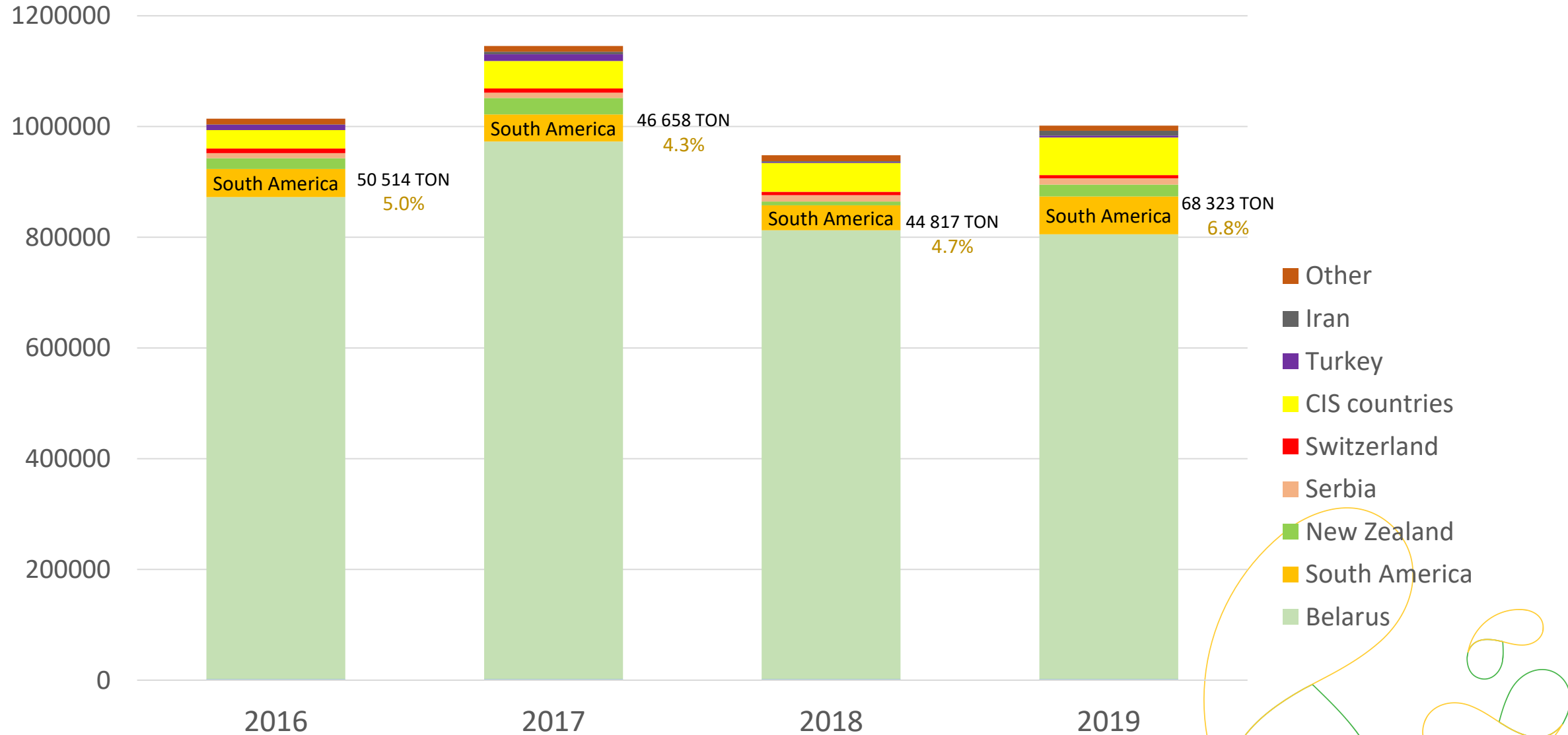
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IMPORTAÇÕES RUSSAS DE LACTICÍNIOS (2011-2019, TONS)



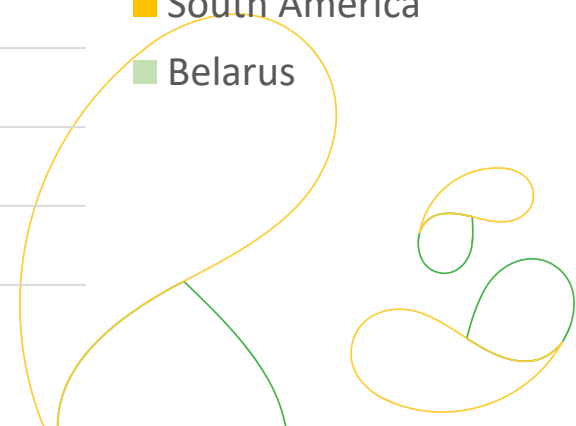
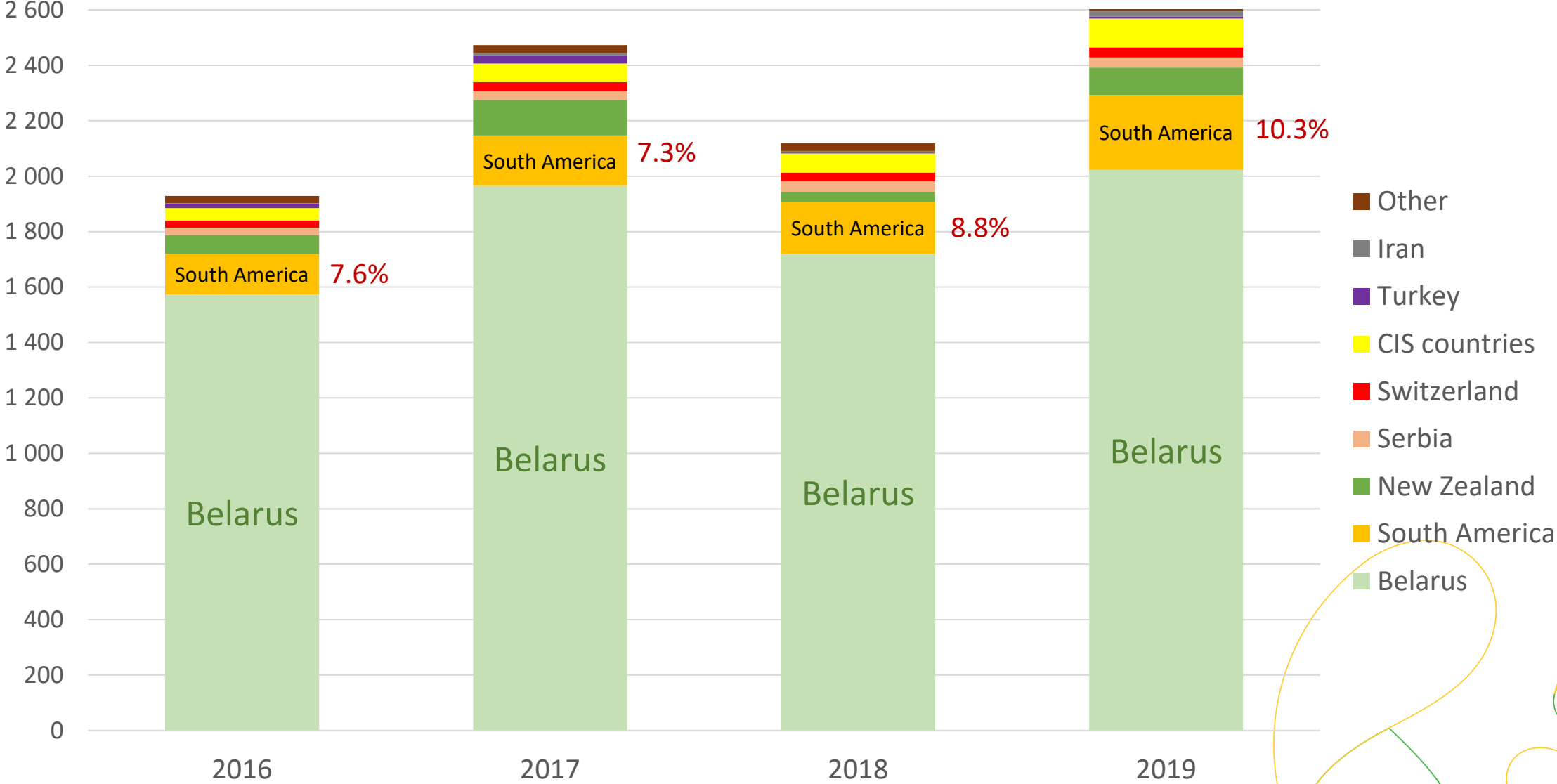
RUSSIAN MILK PRODUCTS IMPORTS (2011-2019, TONS)

IMPORTAÇÕES RUSSAS DE LACTICÍNIOS (2011-2019, TONS)



RUSSIAN MILK PRODUCTS IMPORTS (2011-2019, USD MILLION)

IMPORTAÇÕES RUSSAS DE LACTICÍNIOS (2011-2019, MILHÕES DÓLARES)



Russian Imports of Dairy Products in 2019

Importações Russas de Laticínios em 2019

Main exporting countries / Principais Países Exportadores

	TON	%	USD	%
Rep. Belarus	803 290	80.4%	2 023 059 771	77.4%
Argentina	31 917	3.2%	126 288 376	4.8%
Uruguay	29 232	2.9%	110 718 941	4.2%
New Zealand	21 507	2.2%	99 103 161	3.8%
Kazakhstan	51 536	5.2%	45 045 024	1.7%
Serbia	11 179	1.1%	36 060 541	1.4%
Kyrgystan	8 885	0.9%	29 938 491	1.1%
Iran	8 878	0.9%	19 065 894	0.7%
Switzerland	5 802	0.6%	35 868 732	1.4%
Turkey	3 385	0.3%	6 873 125	0.3%
Azerbaijan	3 284	0.3%	16 530 523	0.6%
Chile	2 908	0.3%	16 451 792	0.6%
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Moldavia	1 338	0.1%	5 630 559	0.2%
Brazil	725	0.1%	4 753 376	0.2%
Colombia	700	0.1%	2 325 200	0.1%
Outros	7 539	0.8%	18 863 632	0.7%
TOTAL:	999 493		2 614 505 591	

Principais
países
fornecedores

Source: Russian Customs Statistics

Eurasian Economic Union Statistics

(for Belarus, Armenia, Kazakhstan and Kyrgystan)



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Russian Imports of Dairy Products in 2019

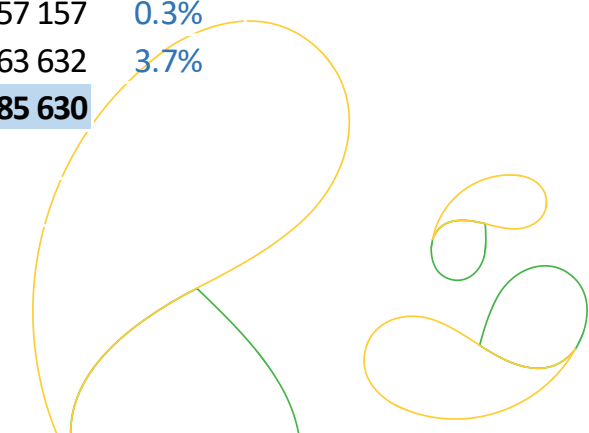
Main exporting countries from outside the EEU (*)

Importações Russas de Laticínios em 2019

Principais países exportadores de fora da UEE (*)

	TON	%	USD	%
Argentina	31 917	24.0%	126 288 376	24.8%
Uruguay	29 232	22.0%	110 718 941	21.7%
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Outros	7 539	5.7%	18 863 632	3.7%
TOTAL:	132 828		509 385 630	

Source: Russian Customs Statistics



Russian Imports of Dairy Products in 2019

Importações Russas de Laticínios em 2019

Main exporting countries / Principais Países Exportadores

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América
do Sul

6,8%
TON

10,3%
USD

Source: Russian Customs Statistics

Eurasian Economic Union Statistics
(for Belarus, Armenia, Kazakhstan and Kyrgyzstan)

Russian Imports of Dairy Products in 2019

Main exporting countries from outside the EEU (*)

Importações Russas de Laticínios em 2019

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América
do Sul

51,4%
TON

53,0%
USD

Source: Russian Customs Statistics

(*) EEU Euroasian Economic Union
UEE União Econômica Euroasiática



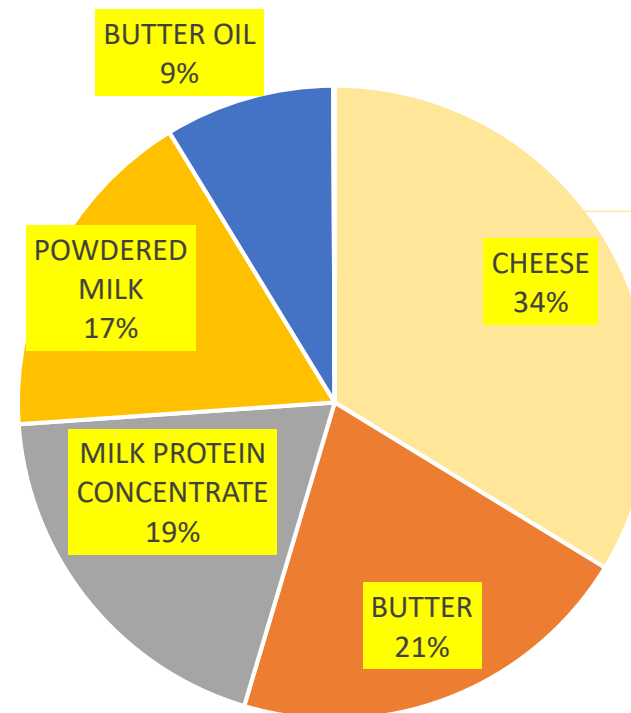
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Argentina



10 766 Ton

Mozzarella	32.0%
Goya	21.3%
Cheddar	12.1%
Parmesan	11.4%
Gouda	10.8%
Blue Cheese	7.0%
Edam	2.3%
Reggianito	2.2%
Other	1.0%

ENTERPRISES LICENCED TO EXPORT MILK & MILK PRODUCTS TO RUSSIA

- 26 enterprises (36 factories)
- 20 exported in 2019

Source: Russian Customs Statistics

Eurasian Economic Union Statistics

(for Belarus, Armenia, Kazakhstan and Kyrgystan)

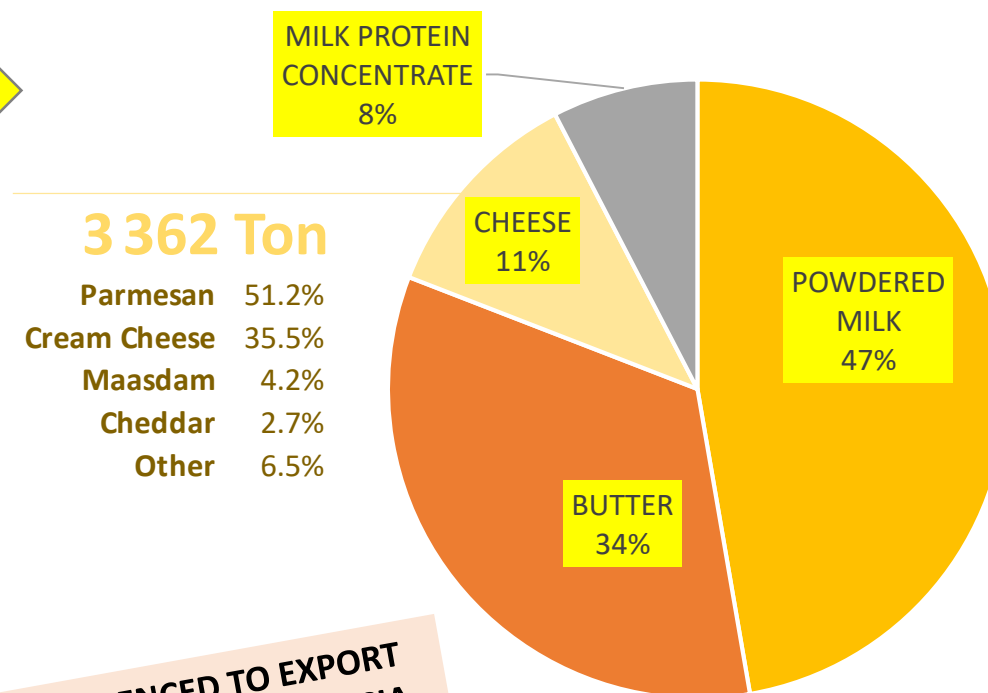


Russian Imports of Dairy Products in 2019

Importações Russas de Laticínios em 2019

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ENTERPRISES LICENCED TO EXPORT MILK & MILK PRODUCTS TO RUSSIA

- 11 enterprises (14 factories)
- 8 exported in 2019

Source: Russian Customs Statistics

Eurasian Economic Union Statistics

(for Belarus, Armenia, Kazakhstan and Kyrgystan)

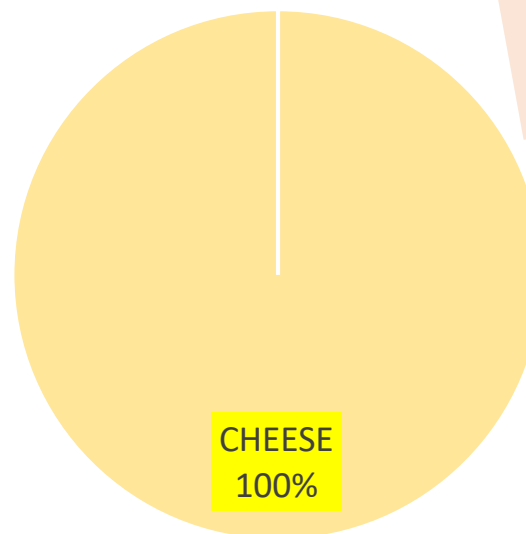


Russian Imports of Dairy Products in 2019

Importações Russas de Laticínios em 2019

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ENTERPRISES LICENCED TO EXPORT MILK & MILK PRODUCTS TO RUSSIA

- 6 enterprises (9 factories)
- 2 enterprises exported in 2019

Parmesan 51.9%
Gouda 31.0%
Other 17.1%



Source: Russian Customs Statistics

Eurasian Economic Union Statistics
 (for Belarus, Armenia, Kazakhstan and Kyrgystan)

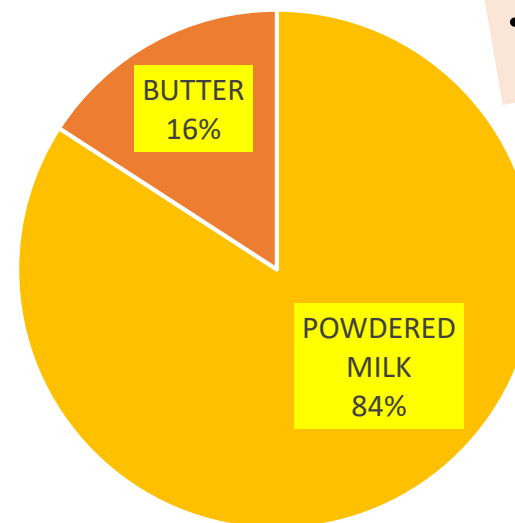


Russian Imports of Dairy Products in 2019

Importações Russas de Laticínios em 2019

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- ENTERPRISES LICENCED TO EXPORT MILK & MILK PRODUCTS TO RUSSIA**
- 3 enterprises (3 factories)
 - 2 enterprises exported in 2019



Source: Russian Customs Statistics

Eurasian Economic Union Statistics

(for Belarus, Armenia, Kazakhstan and Kyrgystan)

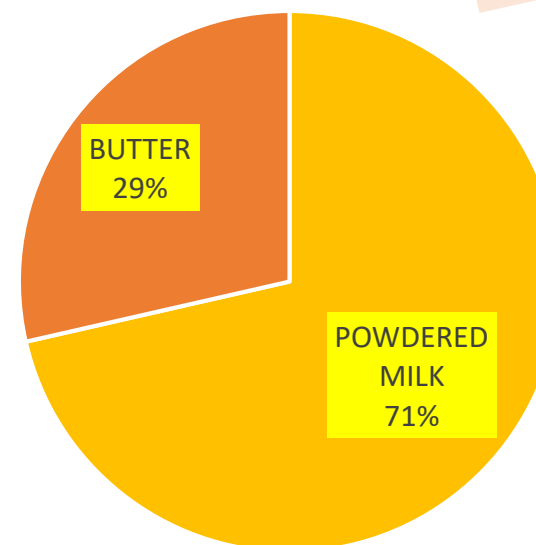


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Colombia

ENTERPRISES LICENCED TO EXPORT MILK & MILK PRODUCTS TO RUSSIA

- 16 enterprises (24 factories)
- 1 enterprise exported in 2019

Source: Russian Customs Statistics

Eurasian Economic Union Statistics

(for Belarus, Armenia, Kazakhstan and Kyrgystan)



Russian Imports of Dairy Products in 2019

Importações Russas de Laticínios em 2019

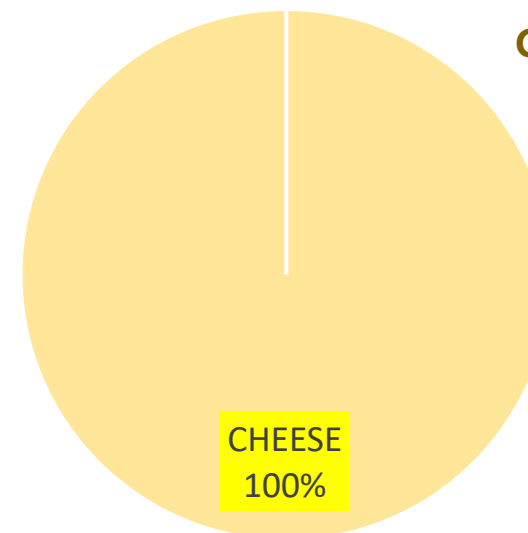
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ENTERPRISES LICENCED TO EXPORT MILK & MILK PRODUCTS TO RUSSIA

- 16 enterprises (22 factories)
- 2 enterprises exported in 2019



Gorgonzola 78.2%
Cheddar 14.9%
Other 6.9%

Source: Russian Customs Statistics

Eurasian Economic Union Statistics

(for Belarus, Armenia, Kazakhstan and Kyrgystan)



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RUSSIAN MILK PRODUCTS IMPORTS* IN 2019 (IN TON)
*** from countries outside the Eurasian Economic Union**

product	TON	%	USD	%
Cheese	40 228	30.3%	186 970 378	36.7%
Butter	30 893	23.3%	147 272 291	28.9%
Powdered Milk	30 371	22.9%	85 490 461	16.8%
Butter Oil	8 533	6.4%	48 638 607	9.5%
Milk Protein Concentrate	9 735	7.3%	17 458 693	3.4%
Milk Cream	7 904	6.0%	16 104 873	3.2%
Milk	1 850	1.4%	1 694 493	0.3%
Yogurt	908	0.7%	1 496 922	0.3%
Sour Cream	678	0.5%	1 067 399	0.2%
Kefir (sour milk product)	766	0.6%	516 646	0.1%
Ryazhenka (sour milk product)	429	0.3%	348 812	0.1%
Buttermilk powder	29	0.0%	71 536	0.0%
Consensed Milk	37	0.0%	55 871	0.0%
Other products	465	0.4%	2 198 647	0.4%
TOTAL:	132 828		509 385 630	

Source: Russian Custom Statistics

**Principais
produtos
importados**



Sales of Cheese by Category: Volume 2014-2019 (Thousand Tonnes)

Category	2014	2015	2016	2017	2018	2019
Processed Cheese	153.9	137.9	133.5	126.4	123.5	122.3
Unprocessed Hard Cheese	396.8	390.2	396.2	407.0	421.1	432.5
Unprocessed Soft Cheese	58.1	58.4	60.6	65.8	70.4	74.4
Total:	608.8	586.5	590.3	599.2	615.0	629.2

fonte: Euromonitor



Sales of Unprocessed Cheese by Type: % Value 2014-2019

% retail value rsp

type	2014	2015	2016	2017	2018	2019
Gollandskiy	42.8	45.0	44.6	44.6	44.5	44.6
Gouda	8.0	8.6	8.9	8.9	8.9	9.0
Edam	7.3	7.7	7.8	7.8	7.9	7.9
Maasdamer	7.7	7.7	7.8	7.8	7.8	7.8
Feta	4.8	5.2	5.6	5.8	5.9	6.1
Brynza	5.3	5.1	5.0	4.9	5.0	5.5
Mozzarella	2.0	2.3	2.6	2.8	2.9	3.2
Brie	1.6	0.4	0.1	0.5	0.6	0.6
Camembert	3.2	0.5	0.0	0.4	0.5	0.5
Others	17.3	17.5	17.6	16.5	16.0	14.8

fonte: Euromonitor

