



UNITER



Meat-processing industry



MEAT INDUSTRY

In 2013, Belarus produced 991 thsd tons of meat.

Belarus has made more than 1,200 kinds of meat products, including 800 types of sausages, about 250 names of semi-finished products, more than 150 kinds of canned food. Currently existing resource base allows to produce for more than 1 000 thsd tons of meat per year. During 2013 the republic produced 991 thsd tons, which is 8.6% more than in 2012.

About 20% of export/agricultural raw materials and food accounts for meat products

In the structure of exports of agricultural raw materials and food products from the Republic of Belarus on the share of exports of meat products accounts for about 20%. Average annual growth rate of exports of meat and meat products (in real terms) was 22% in the last 6 years. The volume of meat exports in 2013 totaled 402 thsd tons, which is 6% higher than in 2012 (380 thsd tons).

Annual per capita consumption of meat and meat products in Belarus - 75 kg

In terms of meat production per capita Belarus far exceeds all the CIS countries, including Russia (29.3 kg) and Ukraine (24.8 kg). Consumption of meat and meat products by the Belarusians (excluding catering) is growing every year. It is estimated that in 2013 the consumption of meat and meat products per capita compared with 2007 increased by only 4 kg to 75 kg, which corresponds exactly to the recommended norm.

Prices for some meat products in Belarus are regulated administratively

The government regulates prices of meat and "social" meat products in the Republic of Belarus. Set a fixed limit selling prices for meat and lumpy meat intermediates, as well as limiting trade margins for some "social" meat products: changes are usually 2 times a year - in spring and autumn. In order to avoid price regulation meatpacking plants orient to the production of meat products with higher added value, as well as exports. However, the authorities brought administrative tasks to meat plant in terms of production of "social" products.

About 200 enterprises in Belarus are engaged in production of meat and meat products

The Belarusian market today employs about 200 producers of meat and meat products, about 27 of them with the state property from 7 to 100%. JSC "Grodno meat-packing plant", JSC "Vitebsk Meat Packing Plant", JSC AFPK "Zhlobinsky meat plant" - the leaders in production capacity (capacity of each company - more than 3000 tons per month).

Plans for the next few years - rapid growth in production and expansion of markets.

The plans for the development of the sector of meat processing in Belarus - to increase production capacity and expand the resource base. Thus, up to 2015 should be built complexes livestock buildings for young cattle on 480,000 cattle stalls. In addition to increasing the volume of production, the increase in exports, as well as the diversification of its geography, due to the heavy reliance on the Russian market, which accounts for 98% of total exports of meat and meat products.

UNITER Investment Company – financial and investment adviser in Belarus with 14+ years of experience with national and international investors in 40+ industries and markets within the country.

The company's activity is focused on investment banking; support of foreign investors and attraction of financing for national companies; conducting marketing and analytical research; project and asset management.

UNITER



220114 Belarus, Minsk, 117A Nezavisimosti avenue 12 floor (Aleksandrov Passage Business Center)

Office +375 17 385 24 65, Fax +375 17 385 24 64, uniter@uniter.by, www.uniter.by

Disclaimer

This outlook was prepared for informational purpose only and does not constitute an offer or solicitation of a strategic transaction. Points of view, forecasts and evaluations presented in this outlook reflects our opinion as of the publication date and may be changed without notice. Although the information contained herein has been obtained from sources we believe to be reliable and although we ensured their accuracy as of the publication date, we cannot guarantee, expressly or impliedly, practicality of this outlook regarding future events or current or future value evaluation. Any investment decision based on this outlook should be made only at the discretion of the investor and UNITER or its employees or any third party shall not be responsible in any form and in no circumstances for any action of any party taken on the basis of this outlook. Nor UNITER, nor any of its employees, nor any third party shall be responsible for losses that result from such actions.

©2017 CJSC «UNITER Investment Company» is registered entity under Belarusian legislation. All rights reserved.

UNITER and UNITER logo are registered trade marks under Belarusian legislation.

