



Livestock breeding in the Republic of Belarus



NATIONAL AGENCY
OF INVESTMENT
AND PRIVATIZATION

REPUBLIC OF BELARUS

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Agriculture in Belarus is a dynamically developing sector, accounting for about 15% of all capital investments. The Republic of Belarus is interested in further modernization of the industry's enterprises, including attraction of foreign investments.

The main branches of animal husbandry in the Republic of Belarus are dairy and meat cattle breeding, pig breeding and poultry farming. The availability of a sufficient number of natural and cultivated forage lands primarily contributes to the cattle breeding industry. From the economic point of view, milk production is more profitable in comparison with other types of livestock production. Due to the targeted selection and breeding efforts and feeding improvement, the efficiency and competitiveness of this sector is constantly increasing.

An increase in gross milk production is associated with further intensification of dairy cattle breeding and its productivity growth, based on genetic potential and improvement of animal feeding and keeping. In recent years, more than half of the milk produced and about 35% of meat have been sold in the foreign market.

We bring to your attention a brief overview of investment opportunities in the field of animal husbandry in the Republic of Belarus for the creation of modern production facilities in this industry.



**Sincerely,
National Agency of Investment and Privatization**

Development of livestock sector in Belarus

The Republic proposes favorable geographical and economic conditions for the development of all livestock section sectors. Livestock breeding in Belarus is the basis for the country's food security; this sector is responsible for over 65% of the gross agricultural output.

From the economic point of view, milk production is more profitable in comparison with other types of livestock production. In 2019, key performance indicators of livestock production, such as livestock and poultry, milk and eggs production demonstrate positive dynamics. Also, the average milk yield from cows in agricultural organizations increased by 39 kg in 2019 compared to 2018 (to 5,043 kg).

Livestock and poultry population in 2019 (of farms of all categories, thousand heads) and livestock sector productivity



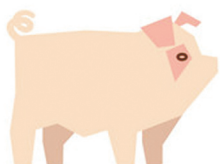
Cattle

4 295 thsd. heads,
productivity:
572 g/day



Cows

1 495 thsd. heads,
productivity:
5043 milk, kg
per cow (+1.6%
compared to 2018)



Pigs

2 882 thsd. heads,
productivity:
608 g/day
(+2.5% comared to 2018)



Poultry

53 mln. heads,
productivity:
268 eggs per
hen (as of 2018)



Horses

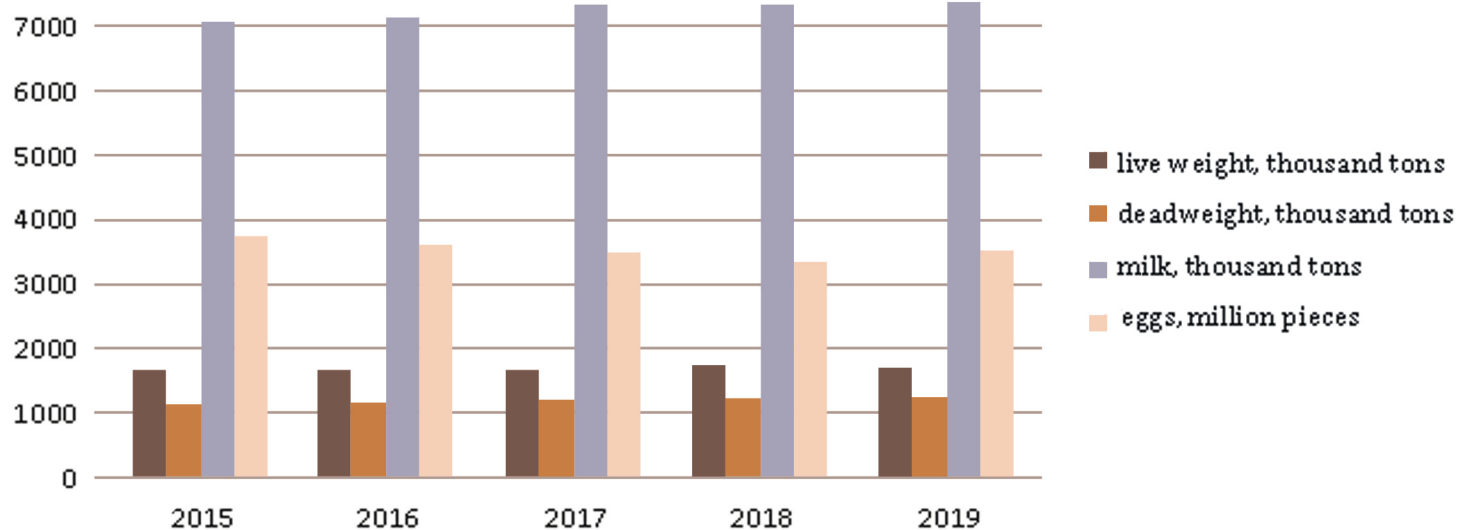
38 thsd. heads



Sheep and goats

149 thsd. heads

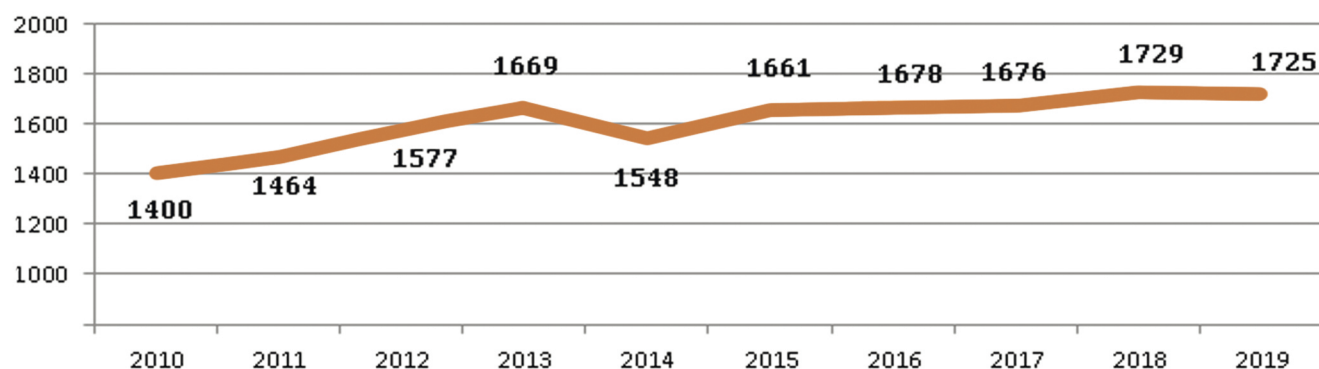
Development of livestock sector in Belarus



**Production of main types of livestock products
(in all categories of farms)**

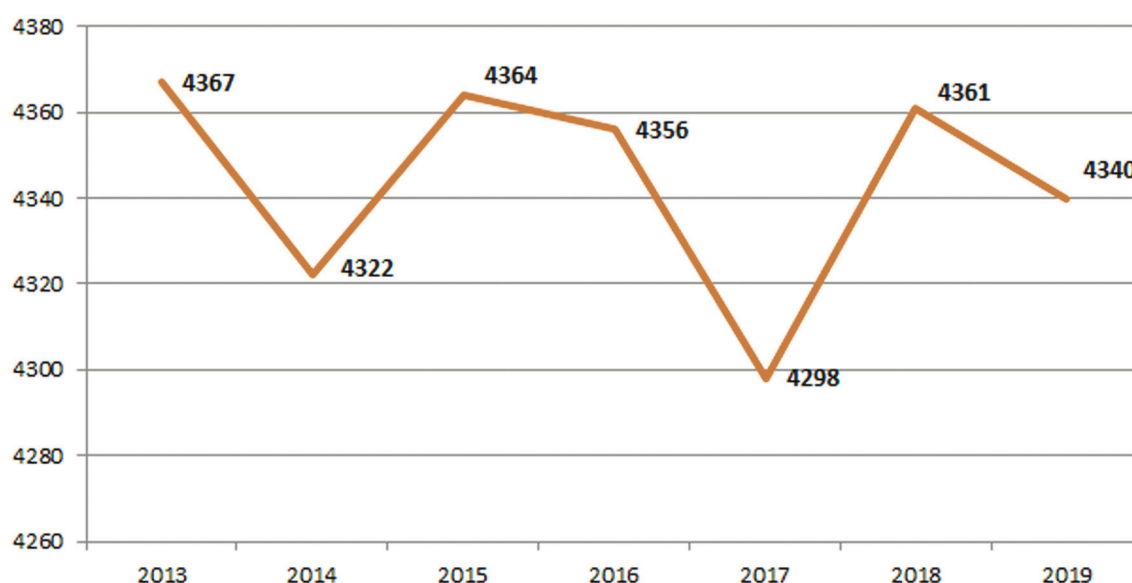
In 2019, sales of livestock and poultry for slaughter (live weight) in agricultural organizations increased by 1.8 thousand tons compared to the previous year (by 0.1%).

The share of cattle sold for slaughter in the total sales volume was 32.7% (in 2018 - 32.4%), pigs - 25.3% (26.5%), poultry - 41.9% (41%).



**Dynamics of cattle and poultry sales for slaughter (in live weight)
by various sales channels, in farms of all categories
(thousand tons) over ten years**

Cattle breeding



Cow population dynamics for ten years, thousand animal units

Due to the renewal of production base of dairy farms and the implementation of modern technologies, dairy cattle breeding have become one of the most dynamic and effective sectors of livestock breeding in the country. In 2019, construction (reconstruction) of 149 dairy farms was completed.

As of January 1, 2020, the number of cows increased by 4.6 thousand heads (by 0.3%). The number of pigs for the period has increased by 68.9 thousand heads (2.8%). The growth of cattle in 2019 was provided by the increase in numbers mainly in Brest and Minsk regions.



LIVESTOCK BREEDING

production growth against 2018

+5.4%
Brest region

+2.8%
Minsk region

+0.9%
Grodno region



MILK PRODUCTION

regions with the largest shares of production

25.1%
Minsk region

24.5%
Brest region

17.5%
Grodno region

Dairy sector

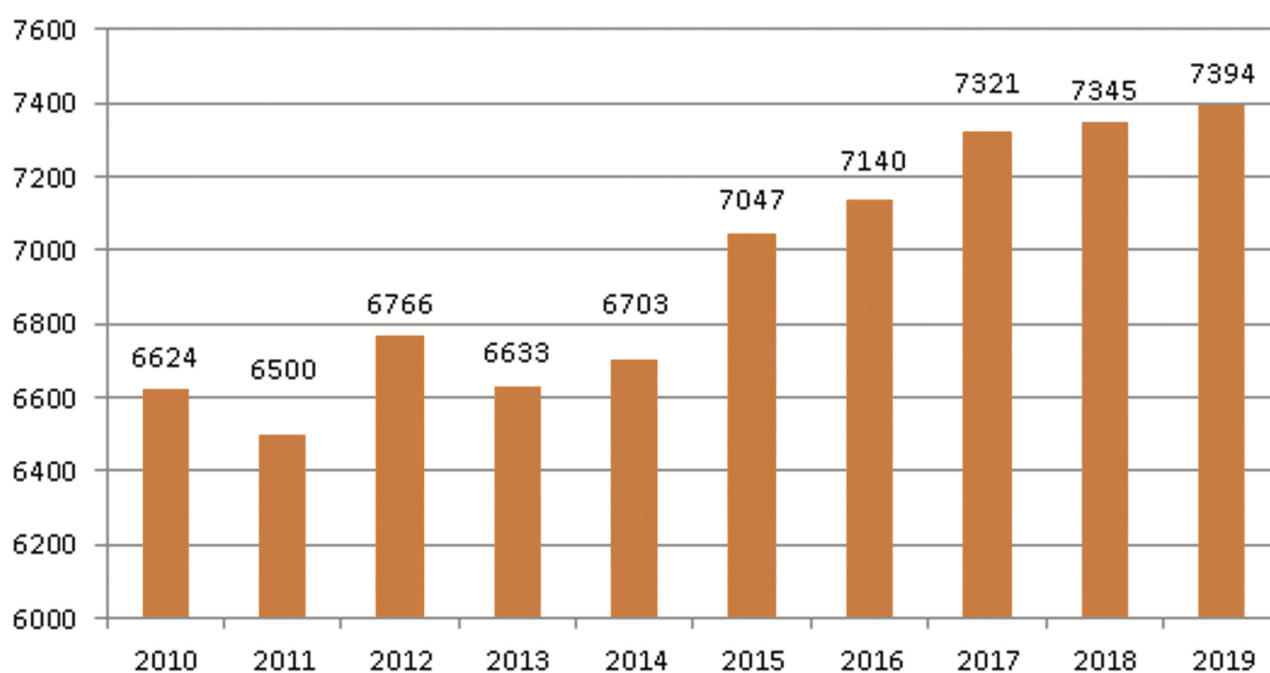
The dairy sector dominates in the production structure of the agricultural sector of Belarus. Milk production growth is mainly caused by higher yield volumes..



28.7%
the share of the dairy complex in the agricultural production

In Belarus, milk is mainly used to produce butter, cheese and whole milk products. The increase in milk production in the last decade has contributed to a significant growth in dairy products output. The highest growth rates were demonstrated by the whole milk and cheese production sectors. Over 10 years, there was an increase by 34.5% and 66.0%, respectively.

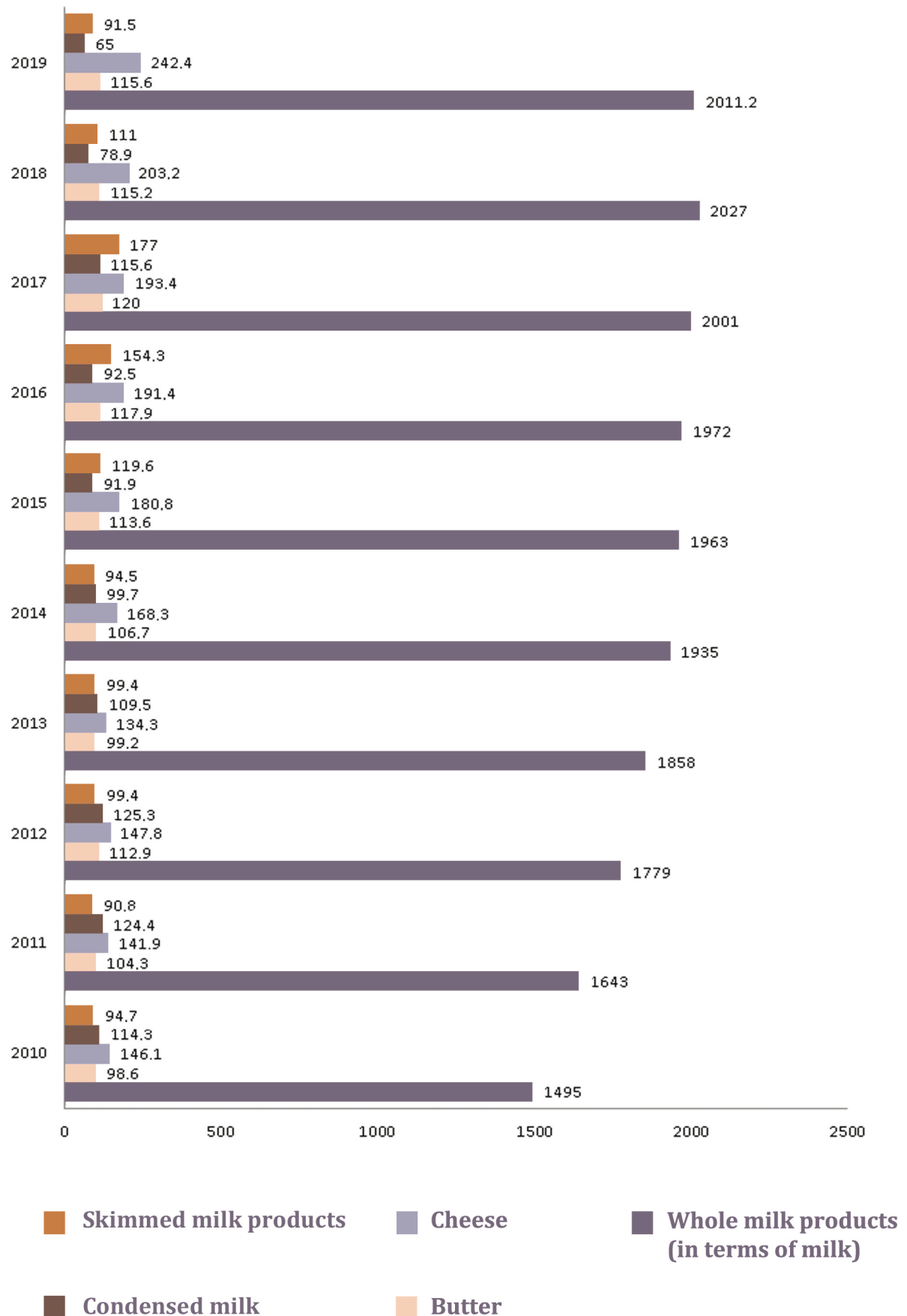
Belarus is remaining a significant player in the dairy market of Russia. The share of Belarus in Russian imports of milk and dairy products exceeded 80%, having doubled in recent years. The Belarusian dairy industry is highly consolidated - since the beginning of the decade, over 140 enterprises have merged into 40 larger holdings.



Milk production dynamics in Belarus on farms of all categories, 2010 - 2019 (thousand tons)

Dairy sector

Dairy production, thousand tons



Dairy sector

Dairy market structure: cheese and milk powder.

The largest milk processors in Belarus are Savushkin Product JSC, Slutsky Cheese Processing Plant JSC, Babushkina Krynka JSC, Danone Belarus JSC, Milkavita JSC.

Dutch varieties of cheese are the most exported cheese species in Belarus. Dutch cheese is also the most popular cheese variety in Belarusian market. Recently, domestic producers have also mastered the production of Finnish cheese and soft Cream Cheese.

Russia is the major export market for Belarusian agricultural and food products due to the absence of tariff barriers. Over the last 5 years, revenues from dairy exports have been fluctuating between USD 1.8-2.4 billion.



there are **330 types**
of cheese in Belarusian retail

there are **over 40**
dairy producers in belarus

JSC "Savushkin Product",
JSC "Berezovsky SK",
JSC "Turovsky MK"
are three leading cheese
producers in Belarus

Russia accounts for about 95% of all Belarusian exports of whole milk, sour milk products and cheese. Russia is also the major export market for milk powder (52.7%) and butter (58.4%). Other important markets are Kazakhstan (milk powder, butter) and China (milk powder and whey). In recent years, the Republic of Belarus has increased its exports of butter and cheese, as well as ryazhenka, common yogurt, cream, yogurt and kefir.

Dairy sector



TOP-5 world exporters of cheese in 2019, thousand tons

Belarus is among

the **TOP-3** world exporters of butter, whey powder and whey-based products

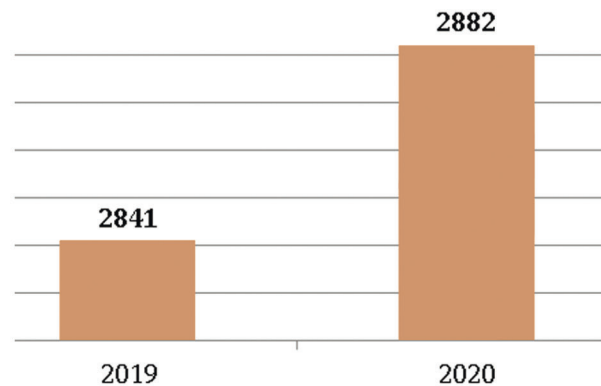
the **TOP-5** the world's leading exporters of skimmed milk powder and condensed milk

the **TOP-10** the world's leading exporters of chilled beef and poultry



Pig breeding

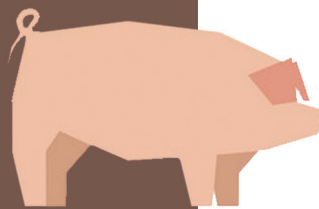
To meet the domestic demand for pork meat in accordance with medical standards (29-30 kg of pork per person per year), it is necessary to produce 400 thousand tons of live weight pork annually.



**Pig stock dynamics,
thousands of heads**

Currently, 450,000-480,000 tons of pork are produced in the country annually. Belarus possesses technological, fodder, and economic resources to increase pork production up to 530-550 thousand tons by 2025, and up to 620-650 thousand tones by 2030, with export value of USD 500-550 million.

A new domestic breed of meat pigs was developed, not conceding to foreign breeds by productivity and meat quality and well-adapted to domestic feed and maintenance conditions.



- ▶ Industrial pig production (rearing) is carried out in **116 complexes** (more than 92 percent of all pig production in Belarus).
- ▶ The average daily pig weight increase was **607 grams** in 2019 (14 grams above the level of 2018).
- ▶ In 2019, **52 pig farms** (45 percent of the total number of farms) reached the average daily weight increase of over 600 grams

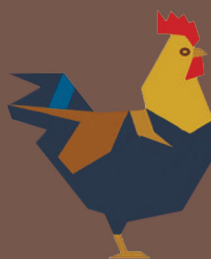
According to the research conducted, pork production in the country can be held mostly on the domestic feed basis. The domestic mixed fodder industry can fully meet the demand of pork breeders for high quality feed.

Poultry industry

The production of meat and milk has been steadily growing over the past ten years in Belarus. Poultry industry was the major contributor to the increase in meat production in the republic. Nowadays poultry meat is equally popular with pork in the domestic market. The annual growth of poultry meat market is 3%. The egg market also increases by 5% year on year. High performance of poultry farming is caused by effective re-equipment, reconstruction and launching new poultry farms. The organization of breeding farms, bringing in the best lines from abroad, the creation of new domestic production allowed to almost completely replace low-productive poultry with linear and hybrid breeds.

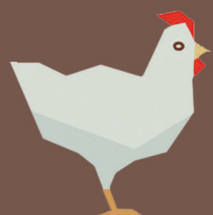


In 2019, poultry production (rearing) on farms of all categories amounted to **708.4 thousand tons** (+2.6% to 2018).



Minsk region is a current leader in poultry meat production.

Over 60 enterprises in Belarus produce poultry meat and eggs



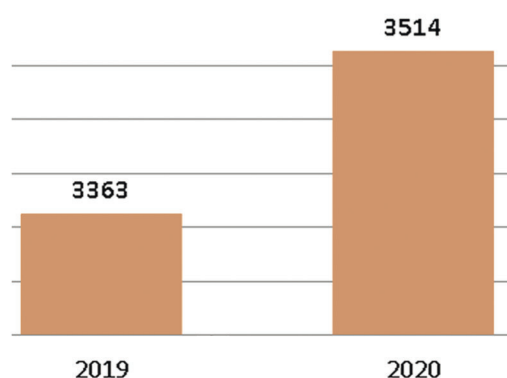
In 2019, the profitability of poultry meat sales in the republic amounted to **7%** (+ 3 % to 2018)



Egg production on farms of all categories amounted to **3514 million eggs** in 2019 (+5% to 2018).

Key players : JSC "Poultry Plant" Druzhba", JSC "Vitebsk broiler poultry factory", JSC "Smolevichi broiler", JSC "Agrokombinat" Dzerzhinskiy", CJSC "Servolux"

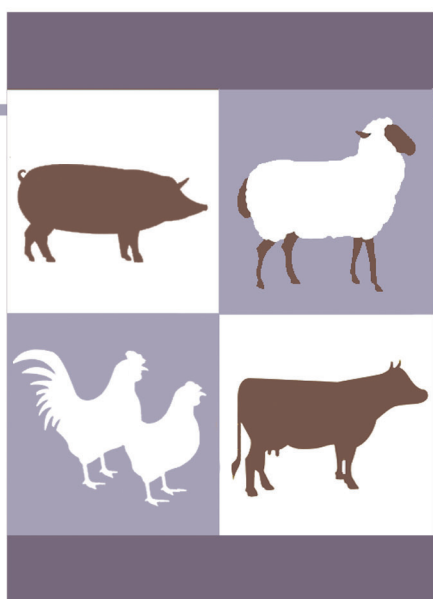
The world market of chicken meat and eggs is growing. As a result, exports of poultry and chicken eggs are growing. Production of eggs enriched with selenium, iodine and vitamins is growing. The major importer of Belarusian poultry products is Russia. Export also goes to Kazakhstan, Armenia, Mongolia, Uzbekistan, and Ukraine.



Egg production dynamics on farms of all categories from all types of poultry, including eggs used for reproduction (hatching) and production of egg powder (million pieces)

Selection and breeding

The main goal of all tribal animal breeding activities is to create, preserve and improve genetic diversity of agricultural animals as well as to obtain tribal material to increase the genetic potential of animals.



In the Republic of Belarus tribal work in animal breeding is currently carried out by

56 farms on dairy cattle breeding,
29 - on meat cattle breeding,
14 - on pig breeding,
19 - on horse breeding,
11 - on poultry breeding,
10 - on fur animal breeding,
14 - on sheep and goat breeding,
8 - on fish breeding,
5 - on tribal beekeeping.

There are 8 organizations of tribal animal husbandry, which are engaged in recording productivity of tribal animals and tribal herds, assessment of phenotypic and genotypic traits of tribal animals. There are also 7 breeding and genetic centers involved in breeding of tribal animals and production of tribal material for the reproduction of livestock and artificial insemination of farm animals.

Breeding organizations annually produce

860 thousand doses
of boar breeding products

about 6 million doses
of bull breeding products

435 thousand heads
of cattle replacements

more than 18 million heads
of ancestral, parental and hybrid young poultry
and other breeding products

235 thousand heads
of store pigs

Selection and breeding

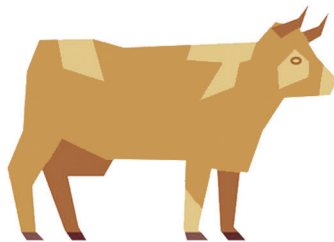
Owing to the thorough breeding work on the breeding farms, the genetic potential has been created, which allows to:

- yield 8-9 thousand kilograms of milk per cow per year in dairy cattle breeding; reach daily weight gain in meat cattle breeding up to 1 kilogram, in pig breeding - up to 750 grams, in broiler breeding - 60-63 grams;
- produce up to 320 eggs per year.

daily weight gain of seed bulls of special meat breeds at aliveries and breeding farms amounted to **1,200-1,500 grams**

weight gain of breeding boars used for artificial insemination of pigs reached **more than 1,000 grams**

the countrywide average productivity of bull dams used in artificial insemination of breeding stock is **11,340 kilograms per year**



dairy cattle breeding involve **25 breeding farms** and **6 breeding and genetics centers.**

13 breeding farms are involved in specialized meat cattle breeding

In 2019, export sales of breeding products and materials exceeded 1.3 million US dollars (major destination countries were Georgia, Uzbekistan, Kazakhstan, Russia). On the basis of Grodno Agrarian University a laboratory for genomic analysis of breeding animals was established.

As of the end of 2019, these farms were keeping 16,375 heads of highly productive milk cows, the average productivity of which exceeded 9,500 kg of milk with 3.6 percent fat content and 3.1 percent protein content. As a result of targeted selection work with best seed bulls, breeding farms sold to aliveries 712 genotype-rated repair bulls, including an assessment of the breeding value based on genomic analysis in 50 bulls. All of the replacement bulls were examined for genetic diseases (abnormalities) and confirmed for the reliability of origin.

Provision of farms with purebred animals

Currently, the number of cows in agricultural organizations involved in the breeding of specialized meat cattle is 27.7 thousand, 19.2 thousand of which are purebred and mixed meat breed cows. As of January 1, 2020, the total number of thoroughbred sows, including gene pool sows, was 11,486 heads on all breeding stock-rearing farms (+1,142 for 5 years). The number of thoroughbred sows increased by 504 heads in 2019 as compared to 2018.

The gene pool of 148 heads of Belarusian black-and-white sows and 1595 heads of Belarusian meat breed has been preserved on breeding farms.

In 2019, breeding farms sold 4,414 heads of pig replacements, including 438 heads of breeding boars, in order to renew the breeding herd of commercial pig complexes of the republic.

As of January 1, 2020, the number of pedigree horses in breeding farms was 1,915 heads. OAO SSC Vikhra in Mstislavsky district and KSUP Teplichnoye in Gomel district managed to preserve the gene pool of pedigree horses in the amount of 80 and 20 heads, accordingly. Breeding farms sold 220 heads of breeding young horses in 2019.



Provision of farms with purebred animals

KSUP Plemptitzzavod Byeloruskij has preserved the gene pool of poultry of domestic crosses in gene pool flocks in the amount of 30,0 thousand heads. The cost of keeping the original lines of breeding poultry (turkey and duck) 6685 heads was also reduced.

The number of purebred sheep ewes grew up to 5,150, which is an increase by 138 percent as compared with 2015. Breeding farms have sold 1,520 heads of repair young sheep to peasant farms and citizens.

The state information system for dairy cattle breeding, pig breeding, horse breeding is currently developed. The system allows recording and assessing breeding (genetic) value of animals. Further development and stage-by-stage implementation of a complex of software and technical means of the state information system in the field of pedigree beef cattle breeding, sheep breeding, fish breeding, and fur farming is being carried out.



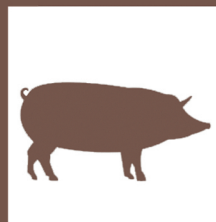
Provision of farms with purebred animals



The use of DNA-technologies will allow for increasing considerably animal productivity through breeding process and thus accelerate raising the economic efficiency of production.

For selection and breeding purposes, in 2019, genetic studies were carried out for 2,160 heads of pedigree animals concerning the reliability of origin and for 800 heads – concerning deterministic diseases.

In the genetic laboratory of the Grodno State Agrarian University, DNA-expertise of tribal animals was cheapened due to the use of the system of high-performance scanning of SNP-biochips. In the future, the results of genetic laboratory research will be used to create a DNA bank and a database of reference populations for dairy cattle breeding.



Foreign trade

The agro-industrial complex makes a significant contribution to the foreign economic activity of the Republic of Belarus.

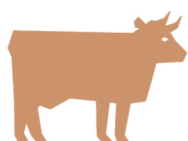
Belarus is one of the 30 leading countries in global meat exports.

In 2019, Belarusian exports of agricultural products and foodstuffs amounted to USD 5.5 billion, 5.7% up from 2018.

16.8 % - the share of agricultural products in the country's total exports (an increase by 1.2% as compared to 2018)

In 2019, exports of meat and meat by-products to the countries outside CIS grew up **3.6 times** in volume terms as compared to 2018 (by 71.8% in value terms).

In 2019, exports increased over the previous year as follows.



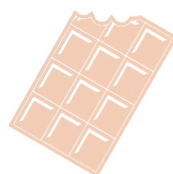
export of **boneless beef** increased by USD 88.9 million



canned fruits and vegetables export – by USD 15.5 million



export of **milk and dairy products** grew by USD 309.4 million



export of chocolate and other prepared foods containing cocoa – by USD 10.8 million



rapeseed oil export – by USD 35.3 million



poultry export – by USD 14.5 million



soybean oil export – by USD 15.5 million



egg export – by USD 7.2 million

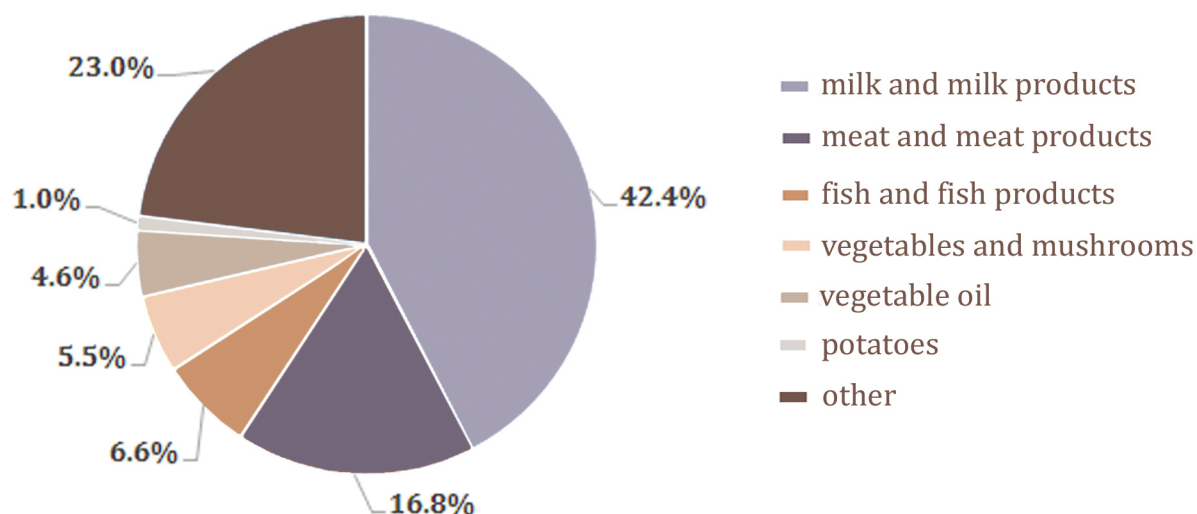
export of **potatoes** – by USD 4.3 million



fish and fish products export – by USD 27.7 million

The agricultural products as listed traditionally account for the major share in the structure of exports of agricultural products and foodstuffs. Their exports grow both due to the increase in physical volume and export prices.

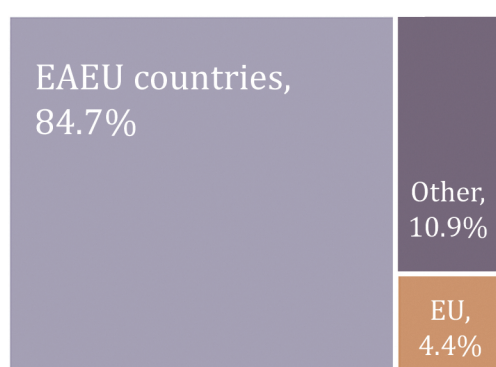
Foreign trade



Structure of Belarusian export of agricultural products and foodstuff in 2019, %

Exports of milk and dairy products amounted to 978.3 thousand tones, exports of these products in value terms increased by 15.5%, while supplies to the CIS countries grew by 16.5% as compared to 2018. Export of cheese and cottage cheese (+22.7% versus 2018), of condensed and dried milk and cream (+11.7% versus 2018) demonstrated the most significant increase in value terms.

In 2019, the products with the largest growth in value of exports to the Russian Federation were as follows: cheese and cottage cheese (+23.4% compared to 2018), butter (+46.9% compared to 2018), condensed milk and cream and dried cream (+20.4 compared to 2018).



The export geography of Belarusian agricultural products and foodstuff by country

Geographic diversification of exports is being constantly developed. In 2019, agricultural products and foodstuff from Belarus were supplied to 104 countries.

There were new markets as follows: Afghanistan in the Asian region; Angola, Benin, Burkina Faso, Guinea, Kenya, Mauritania, Mozambique, Niger, Sudan, Uganda in Africa; Belize, Cuba, Uruguay in the Americas and the Caribbean; Luxembourg, Finland in the European Union; and Albania and Bosnia and Herzegovina.

Belarus in the EAEU market

The major products in the structure of supplies to the common market of the Eurasian Economic Union from the Republic of Belarus are: dairy products, meat and by-products, finished products from meat and fish, vegetables, sugar and finished products from cereals (80%).

External supplies of food products and agricultural raw materials from the Republic of Belarus increased mainly on the account of dairy products by 2.8 times to USD 170.3 million, meat of all types by 42.0% to USD 29.7 million, animal or vegetable fats and oils by 75.6% to USD 110.3 million, and finished meat and fish products by 22.0% to USD 26.4 million.

Structure of production (by volume) on the EAEU market, %	Cattle and poultry at slaughter (live weight)	Milk	Eggs
Armenia	1.0	1.4	1.3
Belarus	8.9	15.8	6.4
Kazakhstan	10.1	12.4	10.0
Kyrgyzstan	2.1	3.5	1.0
Russia	77.9	66.9	81.3

In 2019, Belarus ranked second (behind Russia) in milk production and third (behind Russia and Kazakhstan) in livestock, poultry and eggs production.

By milk production per person, as well as by egg production per person, Belarus is steadily ahead of the EAEU partners.

The gap between the leader and the outsider by egg production in the EAEU, i.e. Belarus and Kyrgyzstan, is 6.4 times. As of the beginning of 2019, cattle and poultry production per capita in Belarus exceeded 1.2-3.3 times the level of EAEU partners. Seasonal fluctuations in meat production in Belarus, unlike Armenia, Kazakhstan and Russia, are minimal.

In Belarus, the inner demand for dairy and meat products is fully met by domestic production. Belarusian meat and dairy producers provide a wide range of high quality products.

Belarus has the highest rate of self-sufficiency with beef and dairy products among the member countries of the Union.

Certification of processed livestock products

For Belarusian enterprises, the halal industry opens up new opportunities for developing their export potential.

Among the food industry enterprises that hold Halal certificates: PUP Bobruiskmoloko, Scientific and Production Center Himmedsintez LLC, Babushkina Krynka OJSC - the managing company of the Babushkina Krynka Mogilev Milk Company Holding, Turov Dairy Plant OJSC, UPE Polotsk Dairy Plant, CJSC ESTKO, JV CJSC Bigan, OJSC Mozyrsol, Smorgon Dairy Products, a branch of OJSC Lida Milk Canning Plant.

The certificates allows Belarusian enterprises to expand their export geography due to the possibility of supplying their products both to the UAE market and to the countries of the Persian Gulf. Products certified by the Belarusian certification body BelHalal LLC are recognized as compliant with halal requirements in the UAE. 10 milk processing organizations have export permits to the European Union. The enterprises on a permanent basis carry out certification of their production according to the quality systems "Halal" and "Kosher".

The right to supply products to China was accredited for:

55 dairy factories,
13 meat processing plants,
8 poultry factories,
7 fish processing organizations.



Investment projects for implementation in the Republic of Belarus



ESTABLISHMENT OF AN ENTERPRISE FOR BREEDING AND PROCESSING GOOSE MEAT

ABOUT THE PROJECT

The investment project involves the creation of an enterprise for growing and processing goose meat.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Increase in export supplies;
- ✓ Increasing demand for 'healthy' products.

PRODUCED GOODS

- Meat in carcasses and half carcasses;
- Semi-finished meat products;
- By-products: goose down and egg.

PROJECT EFFICIENCY



\$ 10 MLN

Project implementation cost



2 YEARS

Term of reaching the design capacity



7 YEARS

The dynamic payback period



\$ 2 MLN

Annual revenue

SETTING UP A TURKEY MEAT BREEDING AND PROCESSING PLANT

ABOUT THE PROJECT

The investment project involves setting up a Turkey meat breeding and processing plant.

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume "healthy" products;
- ✓ Decrease in the share of imports and increase in the share of exports;
- ✓ The development of own production of Turkey meat.

ADVANTAGES OF THE IMPLEMENTATION

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot;
- ✓ Increasing demand for environmentally friendly products.

PRODUCED GOODS:

- Meat in carcasses and half-carcasses;
- Semi-finished meat products;
- Byproducts.

INVESTMENT ATTRACTIVENESS OF THE PROJECT

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Lack of high competition.

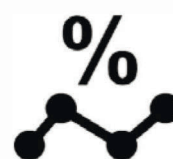
DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 20%

EU – 10%

Southeast Asia– 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

GORODOK DISTRICT

COST — \$ 3,5 MLN
INFRASTRUCTURE:



KRUGLYANSKY DISTRICT

COST — \$ 5,5 MLN
INFRASTRUCTURE:



KOBRIN DISTRICT

COST — \$ 0,5 MLN
INFRASTRUCTURE:



BARANOVICHI DISTRICT

COST — \$ 0,5 MLN
INFRASTRUCTURE



SETTING UP OF THE RABBIT MEAT PRODUCTION COMPANY

ABOUT THE PROJECT

The investment project involves the creation of a high-tech enterprise for processing rabbit meat using modern technologies for keeping animals.

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume "healthy" products;
- ✓ Decrease in the share of imports and increase in the share of exports;
- ✓ The development of own production of rabbit meat.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot and developed infrastructure.

PRODUCED GOODS:

- Rabbit meat in carcasses and half-carcasses;
- Byproducts;
- Pelts;

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Lack of industrial production of rabbit meat in the Republic of Belarus.

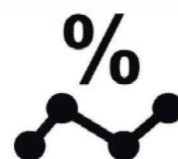
DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 70%

Belarus – 40%

EU – 20%

Southeast Asia– 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

BRASLAV DISTRICT

COST – \$ 0,5 MLN

INFRASTRUCTURE:



DRIBINSKY DISTRICT

COST – \$ 14 MLN

INFRASTRUCTURE:



KRASNOPOLSKY DISTRICT

COST – \$ 3,4 MLN

INFRASTRUCTURE:



SETTING UP A DAIRY CATTLE FARM

ABOUT THE PROJECT

The investment project involves the creation of high-tech farms for breeding dairy cattle for 3000 - 5000 heads with the aim of producing at least 15 000 tons of milk per year.

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume 'healthy' products;
- ✓ Increase in export supplies;
- ✓ Development of own production of dairy farming.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot and developed infrastructure.

PRODUCED GOODS:

- Milk;
- Dry milk;
- Other dairy products.

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Increasing demand for environmentally friendly products.

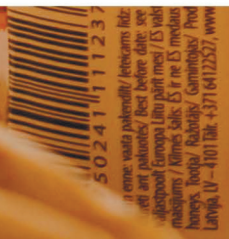
DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 40%

EU – 10%

Southeast Asia – 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

BRASLAV DISTRICT

COST – \$1 MLN
INFRASTRUCTURE:



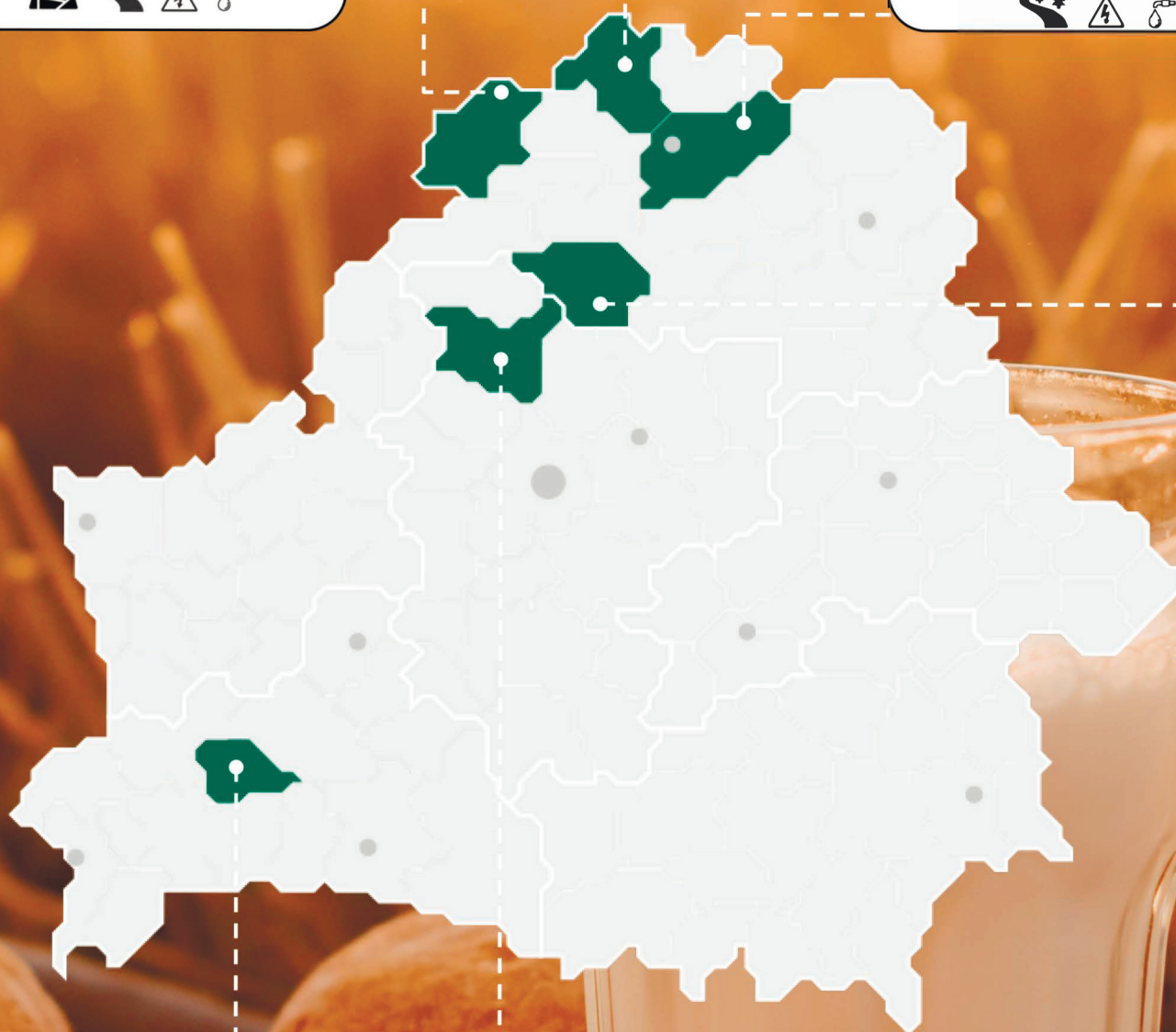
VERKHNEDEVINSKY DISTRICT

COST – \$31 MLN
INFRASTRUCTURE:



POLOTSK REGION

COST – \$33 MLN
INFRASTRUCTURE:



BEREZOVSKY DISTRICT

COST – \$2 MLN
INFRASTRUCTURE:



VILEYSKY DISTRICT

COST – \$2,4 MLN
INFRASTRUCTURE:



DOKSHITSKY DISTRICT

COST – \$2,5 MLN
INFRASTRUCTURE:





SETTING UP AN ENTERPRISE FOR GROWING AND PROCESSING GRAPE SNAILS

ABOUT THE PROJECT

The investment project involves the creation of an enterprise for the cultivation of grape snails, the production of snail caviar, as well as their industrial re-production.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences in the implementation of an investment project;
- ✓ Availability of land plot.
- ✓ Increasing demand for exotic products

PRODUCED GOODS:

- Grape snail;
- Snail (white) caviar.

PROJECT EFFICIENCY



\$ 1,5 MLN

Project implementation cost



1 YEAR

Term of reaching the design capacity



3 YEARS

The dynamic payback period



\$ 0,8 MLN

Annual revenue

SETTING UP AN ENTERPRISE FOR GROWING AND PROCESSING DUCK MEAT

ABOUT THE PROJECT

The investment project involves the creation of an enterprise for growing and processing duck meat.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot.

PRODUCED GOODS:

- Meat in carcasses and half-carcasses;
- Semi-finished meat products;
- Byproducts;
- Egg incubation.

PROJECT EFFICIENCY



\$ 15 MLN

Project implementation cost



2 YEARS

Term of reaching the design capacity



8 YEARS

The dynamic payback period



\$ 2,5 MLN

Annual revenue

SETTING UP A FARM ON CULTIVATION OF CATTLE OF MEAT DIRECTION

ABOUT THE PROJECT

The investment project involves the creation of high-tech farms for breeding cattle of the meat direction for 3 000 - 5 000 heads for the purpose of its further processing and production of meat products

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume 'healthy' products;
- ✓ Increase in export supplies;
- ✓ Development of own production of dairy farming.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot and developed infrastructure.

PRODUCED GOODS:

- Meat in carcasses and half-carcasses;
- Semi-finished meat products;
- Byproducts.

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Increasing demand for environmentally friendly products.

DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 40%

EU – 10%

Southeast Asia – 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

KRUGLYANSKY DISTRICT

COST – \$ 8 MLN

INFRASTRUCTURE:



KLIMOVICHI DISTRICT

COST – \$ 2.5 MLN

INFRASTRUCTURE:



SETTING UP AN ENTERPRISE FOR BREEDING MEAT-TYPE CHICKENS

ABOUT THE PROJECT

The investment project involves creation of the enterprise for the industrial breeding of the parent herd of meat chickens and their subsequent processing.

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume 'healthy' products;
- ✓ Increase in export supplies;
- ✓ Development of own production of meat type chicken.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot and developed infrastructure.

PRODUCED GOODS:

- Meat breed chickens;
- Poultry meat;
- Semi-finished meat products;
- Eggs;
- Byproducts.

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Availability of product sales channels.

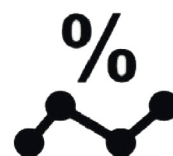
DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 30%

EU – 10%

Southeast Asia – 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

NOVOGRUDOK DISTRICT

COST – \$ 2 MLN

INFRASTRUCTURE:



GORODOK DISTRICT

COST – \$ 3,5 MLN

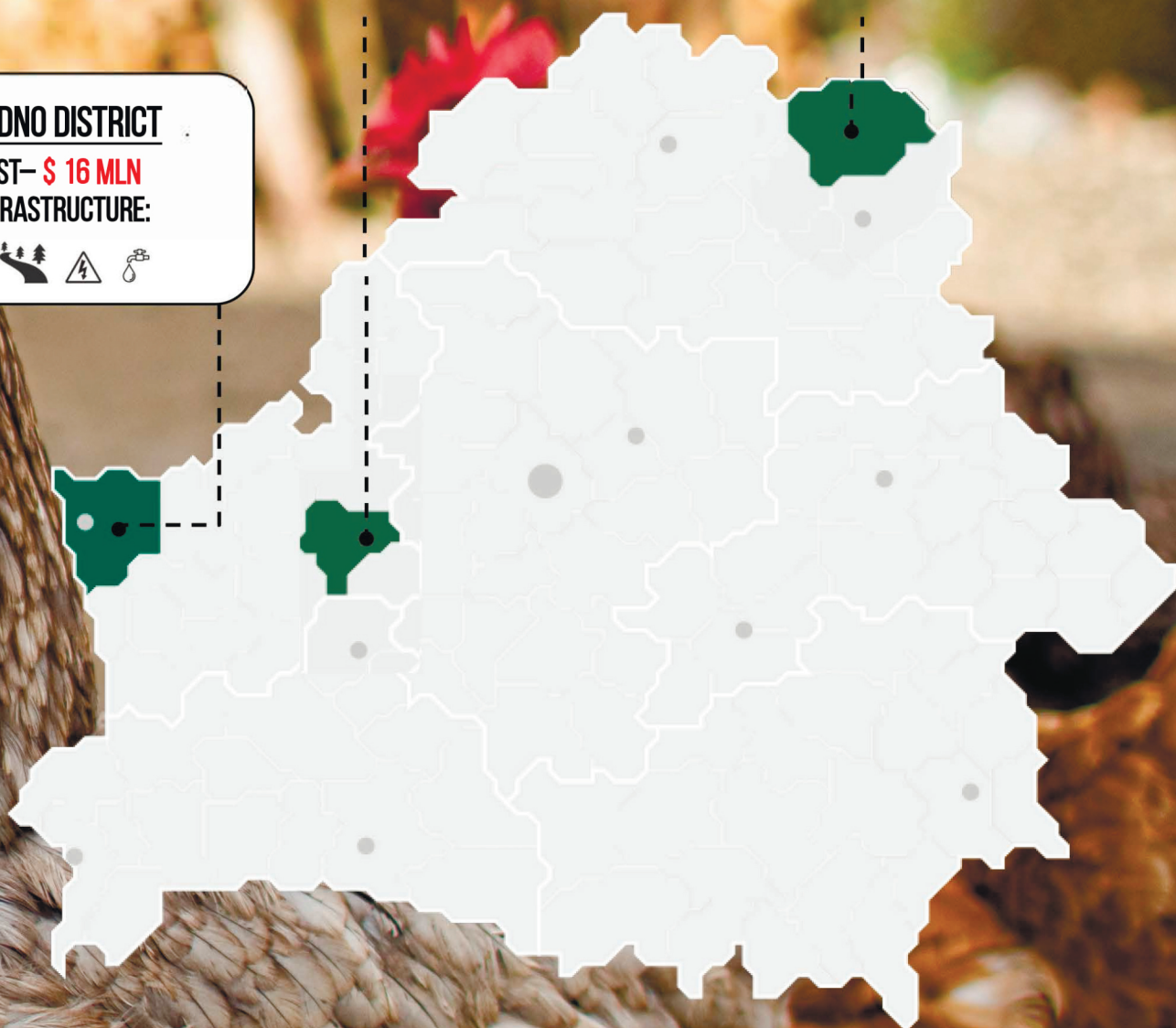
INFRASTRUCTURE:



GRODNO DISTRICT

COST – \$ 16 MLN

INFRASTRUCTURE:



SETTING UP AN ENTERPRISE FOR BREEDING EGG-TYPE CHICKENS

ABOUT THE PROJECT

The investment project involves creation of the enterprise for industrial breeding of the parent flock of egg-bearing hens and egg production.

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume 'healthy' products;
- ✓ Increase in export supplies;
- ✓ Development of own production of egg-type chickens.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot and developed infrastructure.

PRODUCED GOODS:

- Egg chickens;
- Eggs;
- Poultry meat;
- Semi-finished meat products;
- Byproducts.

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Availability of product sales channels.

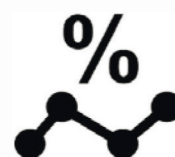
DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 30%

EU – 10%

Southeast Asia – 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

NOVOGRUDOK DISTRICT

COST – \$ 2 MLN

INFRASTRUCTURE:



GORODOK DISTRICT

COST – \$ 3,5 MLN

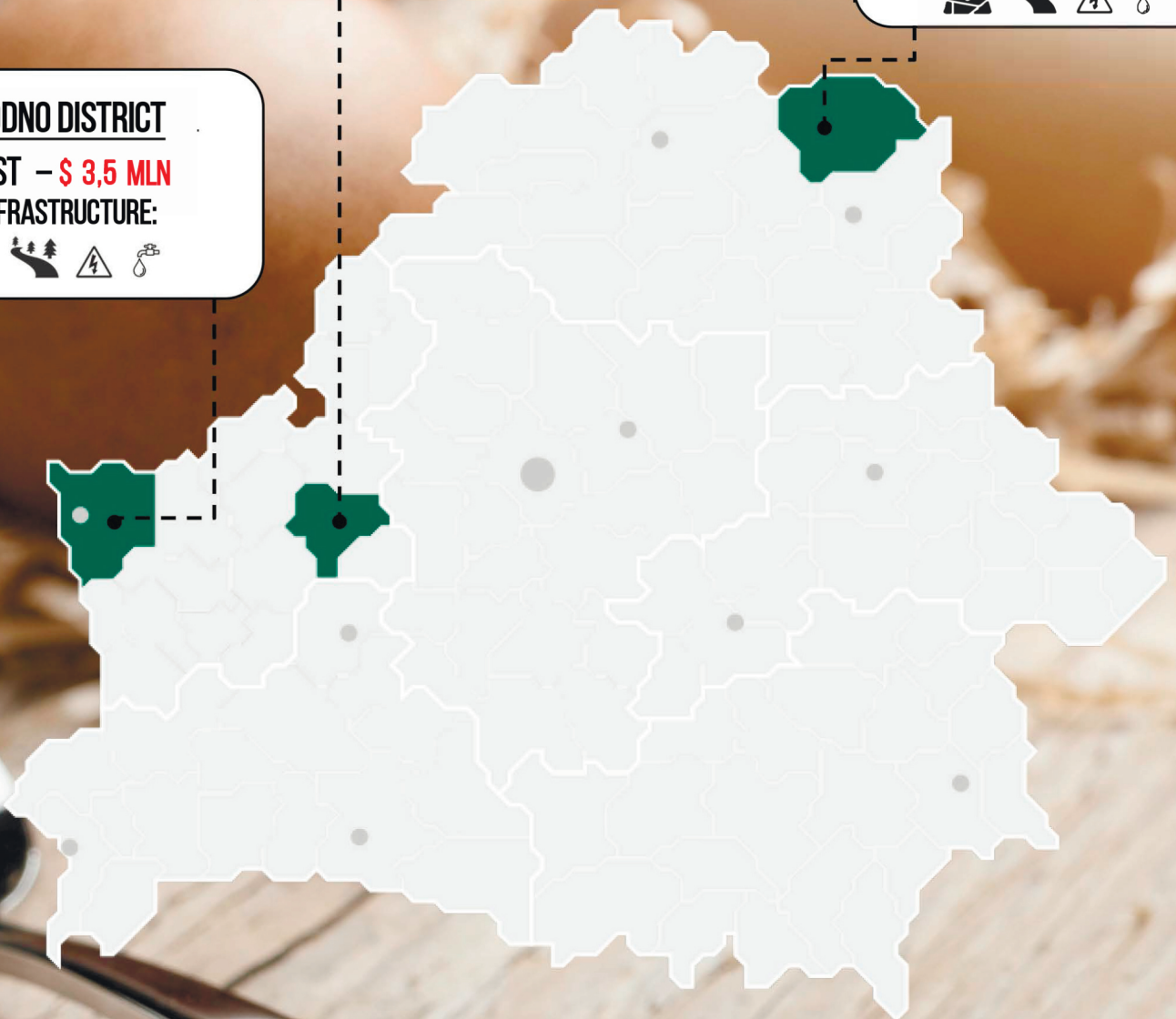
INFRASTRUCTURE:



GRODNO DISTRICT

COST – \$ 3,5 MLN

INFRASTRUCTURE:



SETTING UP A SHEEP FARMING ENTERPRISE

ABOUT THE PROJECT

The investment project involves the creation of an enterprise for breeding sheep and processing them.

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume 'healthy' products;
- ✓ Increase in export supplies;
- ✓ The development of domestic production sheep's meat.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot;
- ✓ Increasing demand for eco-friendly products.

PRODUCED GOODS:

- Meat in carcasses and half-carcasses;
 - Semis;
 - Byproducts;
 - Wool.

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Availability of product sales channels.

DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 30%

EU – 10%

Southeast Asia – 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

BARANOVICH DISTRICT

COST – \$ 0,9 MLN
INFRASTRUCTURE:



IVATSEVICH DISTRICT

COST – \$ 0,2 MLN
INFRASTRUCTURE:



LYAKHOVICH DISTRICT

COST – \$ 2,5 MLN
INFRASTRUCTURE:



SALE OF SHARES OF THE MULTI-PROFILE AGRICULTURAL ORGANIZATION JSC 'OZERITSKY-AGRO'

ABOUT THE PROJECT

The investment project involves the purchase of the blocking shares (25% + 1 share or by agreement with the owner - more than 90%), as well as joint activities to develop the enterprise and improve the efficiency of operations.

ABOUT THE ORGANIZATION

- ✓ Located on the territory of the Minsk region, Smolevichi district;
- ✓ Area of the territory – 8,830 ha;
- ✓ Specialization:
 1. Livestock (dairy and beef direction);
 2. The production of canned products;
 3. Tourism.

PROJECT EFFICIENCY



Cost of purchasing the blocking shares

MAIN ACTIVITY:

1. JSC 'Ozeritsky-agro'. Animal husbandry – dairy production, cultivation of meat breeds. The total number of livestock is 6,343. Crop production – cultivation of cereals, legumes, forage and industrial crops. The land area is 8,241 ha.
2. Agroecotourist Park "Dubrova"
Beach holidays and fishing
3. Wellness centre "Sosnovaya".

THE SALE OF SHARES OF A DIVERSIFIED AGRICULTURAL ORGANIZATION - JSC "TUROVSHCHINA"

ABOUT THE PROJECT

The investment project involves the purchase of the blocking shares (25% + 1 share or by agreement with the owner – more than 90%), as well as joint activities to develop the enterprise and improve the efficiency of operations.

ABOUT THE ORGANIZATION:

- ✓ Located on the territory of Gomel region, Zhitkovichi district;
- ✓ Territory area – 26,396 ha;
- ✓ Specialization:
 1. Animal husbandry: dairy and meat production;
 2. The production of canned products;
 3. Crop Production (forage grains).

PROJECT EFFICIENCY



\$ 7 MLN

Cost of purchasing the blocking shares

MAIN ACTIVITY:

1. JSC Turovshchina". Animal husbandry dairy production, cultivation of meat breeds. The total number of livestock is 11,992. Crop production – cultivation of cereals, legumes, forage and industrial crops. The total land area is 18,094 ha.
2. Branch 'Turov cannery'. Processing of products, production of canned food.
3. Branch 'Elk island'. Tourism, hunting and fishing. The land area is 128,400 ha.

CREATION OF A PIG BREEDING COMPLEX

ABOUT THE PROJECT

The investment project involves creation of a high-tech and highly efficient pig breeding and processing enterprise

PREREQUISITES FOR IMPLEMENTATION:

- ✓ The desire of the population to consume 'healthy' products;
- ✓ Increase in export supplies;
- ✓ Development of own production of meat type chicken.

ADVANTAGES OF THE IMPLEMENTATION:

- ✓ Availability of qualified and cheap labor resources;
- ✓ Guaranteed sales markets in the Republic of Belarus and abroad;
- ✓ Benefits and preferences attached to the implementation of the investment project;
- ✓ Availability of land plot and developed infrastructure.

PRODUCED GOODS:

- Meat in carcasses and half-carcasses;
- Semi-finished meat products;
- Byproducts.

INVESTMENT ATTRACTIVENESS OF THE PROJECT:

- Expanding the range of products;
- Stable demand for products in Belarus and abroad;
- Increasing demand for environmentally friendly products.

DISTRIBUTION OF SALES BY MAJOR REGIONS

CIS – 80%

Belarus – 40%

EU – 10%

Southeast Asia – 10%



POSSIBLE LOCATIONS TO IMPLEMENT THE PROJECT:

MIORSKY DISTRICT

COST – \$ 42 MLN
INFRASTRUCTURE:



POLOTSK DISTRICT

COST – \$ 42 MLN
INFRASTRUCTURE:



ORSHA DISTRICT

COST – \$ 42 MLN
INFRASTRUCTURE:



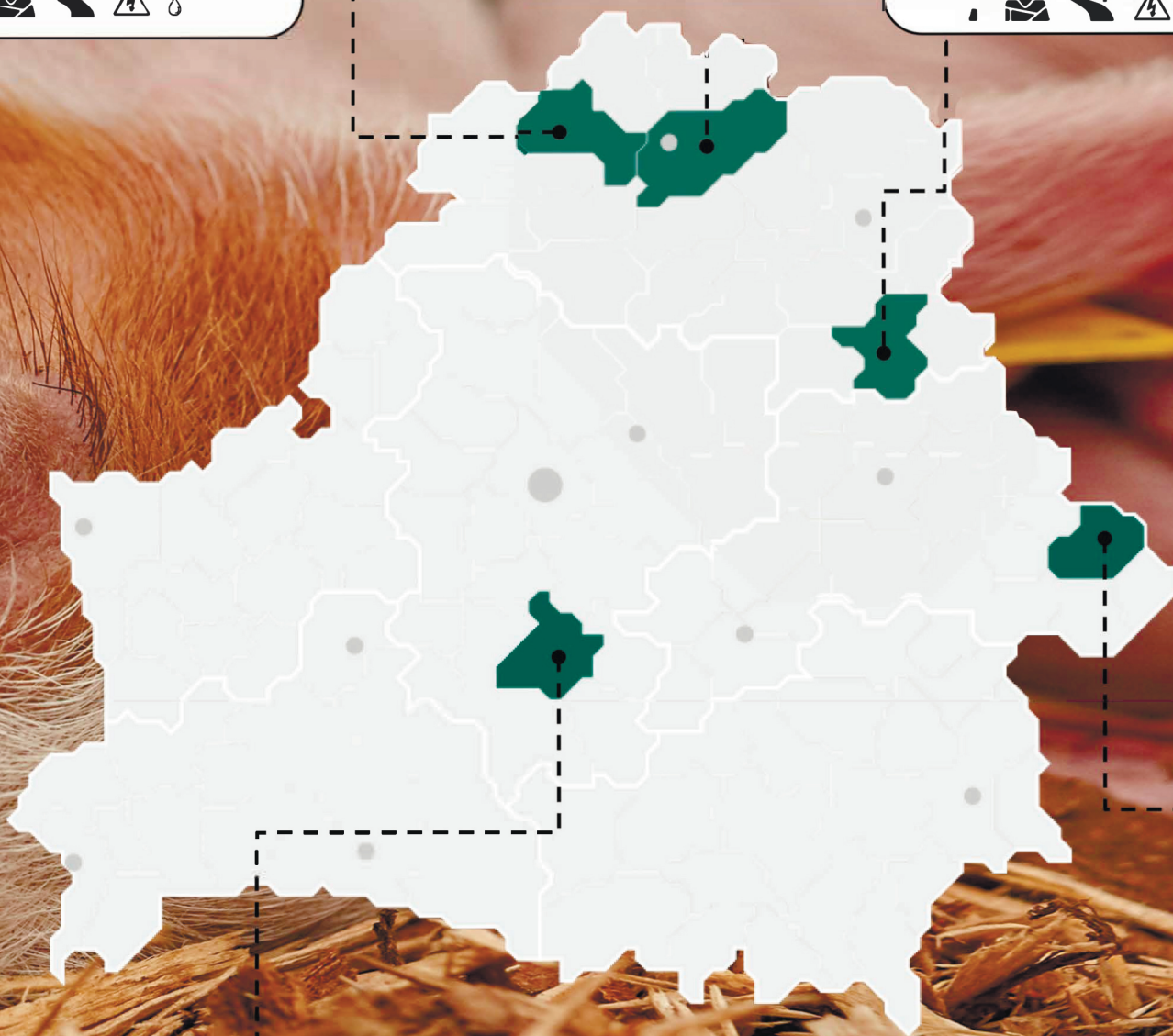
SLUTSK DISTRICT

COST – \$ 17 MLN
INFRASTRUCTURE:

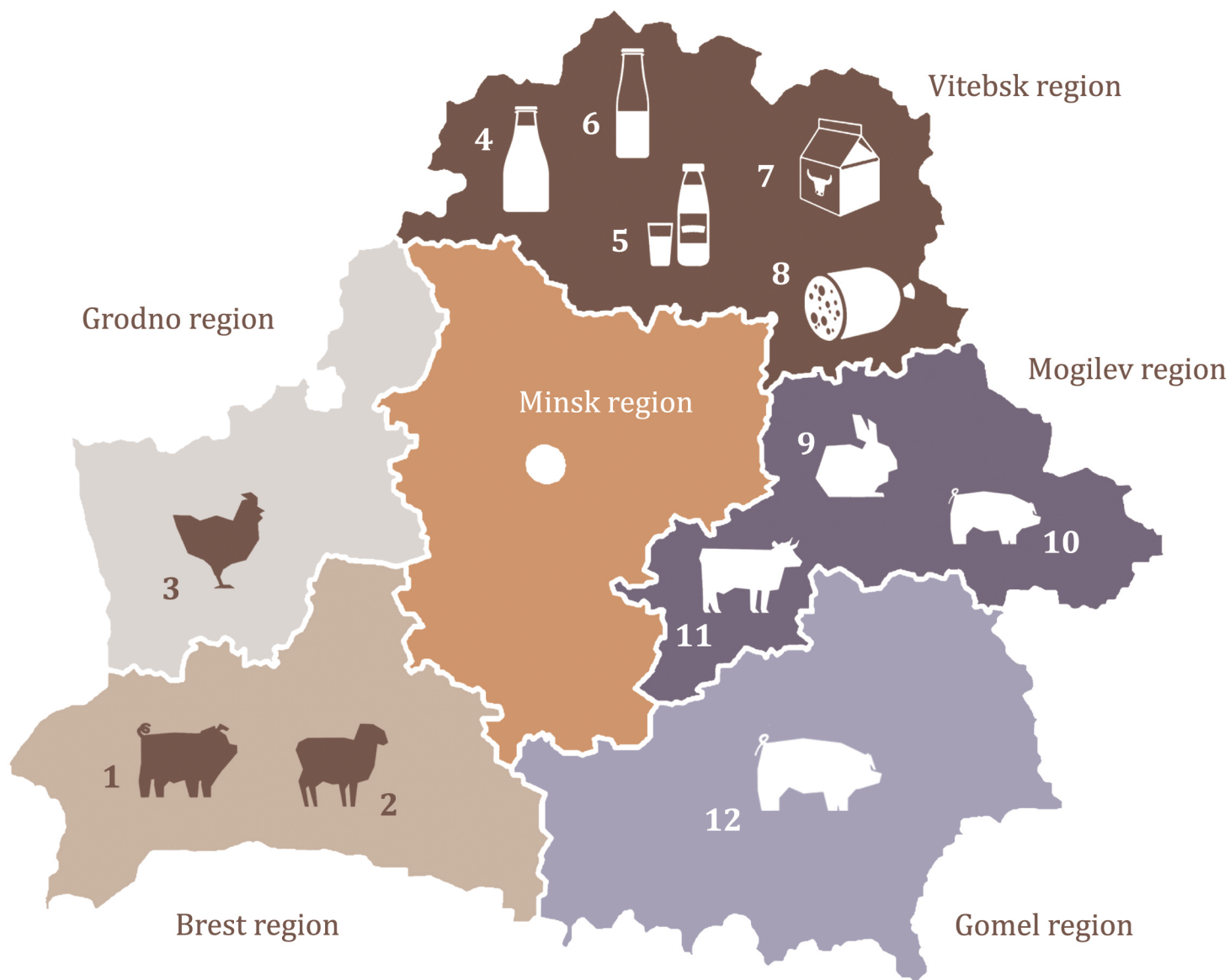


KLIMOVICHI DISTRICT

COST – \$ 20 MLN
INFRASTRUCTURE:



Projects for the livestock breeding are represented at the interactive portal "Investor's Roadmap"



map.investinbelarus.by

More investment projects and ideas, as well as land plots and real estate objects for the implementation of investment projects can be found on the interactive portal "Investor's Roadmap"

Projects for the livestock breeding are represented at the interactive portal "Investor's Roadmap"

Name of the investment project		Project cost	Form and expected participation of the investor
Brest region			
1	Construction of a full-cycle pig breeding complex for 3,600 sows	60.5 mln USD	Making a contribution to the authorized capital of the new enterprise.
2	Establishment of production facilities for raising and fattening sheep	1 mln USD	Setting up a new enterprise
Grodno region			
3	Construction of a poultry farm with the organization of production of poultry products marked "Halal"	200 thsd USD	Setting up a new enterprise
Vitebsk region			
4	Establishment of dairy-commodity farm	46 mln USD	Setting up a new enterprise
5	Construction of a 2000-head robotic MTF	8.5 mln USD	New enterprise with the participation of a local partner, creation of a new production facility (enterprise)
6	Construction of a milk processing plant	2 mln USD	Setting up a new enterprise
7	Construction of a dairy complex for 5,000 heads and a factory for the production of milk powder with 100% export delivery	80 mln USD	New enterprise with the participation of a local
8	Construction of pig reproducers for 5000 heads	42 mln USD	Setting up a new enterprise
Mogilev region			
9	Livestock complex for the production of rabbit meat	14 mln USD	Setting up a new enterprise
10	Construction of a pig breeding complex	20 mln USD	Setting up a new enterprise
11	Development of beef cattle breeding	2.5 mln USD	Setting up a new enterprise
Gomel region			
12	Construction of a pig farm for 24 thousand heads	4 mln USD	Setting up a new enterprise

The Republic of Belarus

The Republic of Belarus is a state in the center of Europe. The shortest transport communications that connect the CIS countries with the states of Western Europe run through the territory of Belarus. By area Belarus surpasses such European countries as Austria, Belgium, Greece, the Netherlands, Portugal, and the Czech Republic.

Agricultural land makes up 41% of the territory of Belarus, forest land -42%.

The Republic of Belarus is an export-oriented state with a developed industry, services sector and agriculture.

Belarus maintains trade relations with almost all countries of the world.



Key indicators, 2019



Population

9.48 mln (45.7 people/km²)



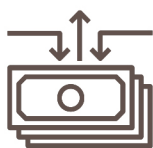
Territory

207.600 km²



Foreign trade in goods and services

~84.2 bln \$ (2019)



Nominal GDP

~63.2 bln \$ (2019)



GDP per capita

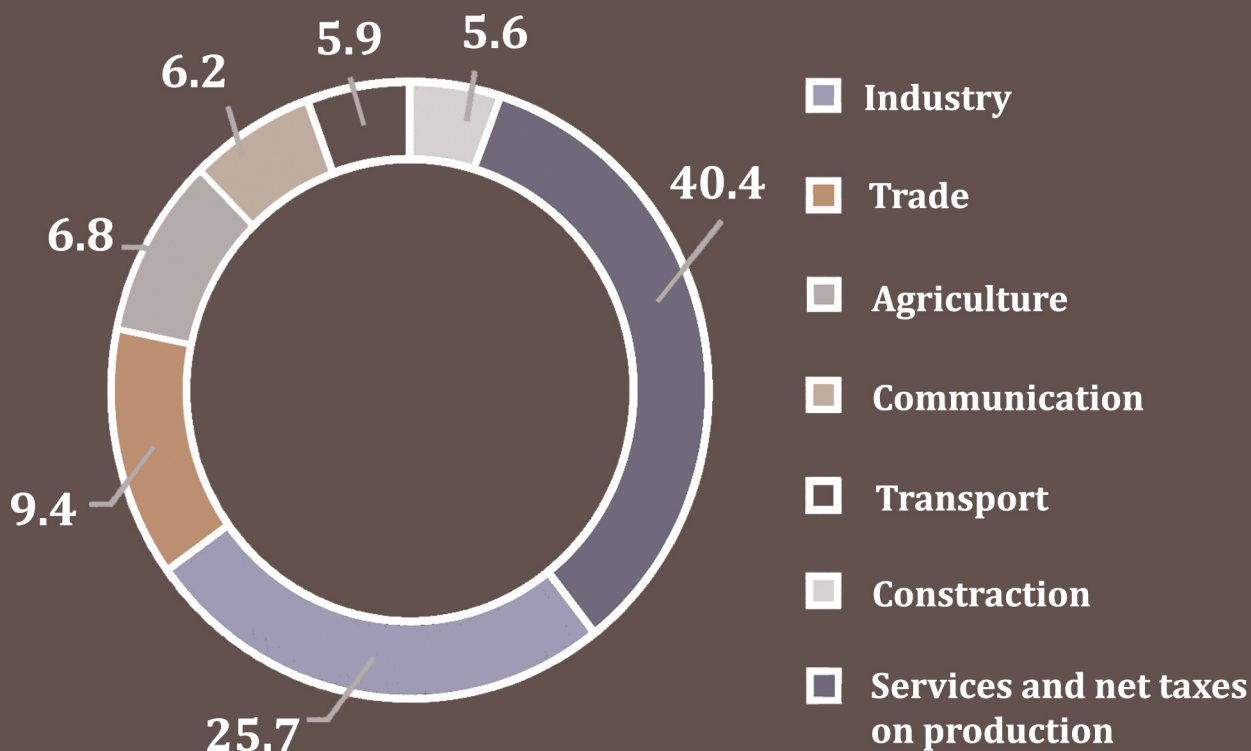
~20.1 thsd \$ (2019)



Net FDI

~1.3 bln \$ (2019)

GDP structure, 2019



Global rankings

FDI Intelligence, 2020

Minsk	2
Sofia	3
Bucharest	4
Kiyev	5

*among the cities of Europe, division «The Financial Times», category "Cost Effectiveness doing business "

Global Food Security Index, 2019

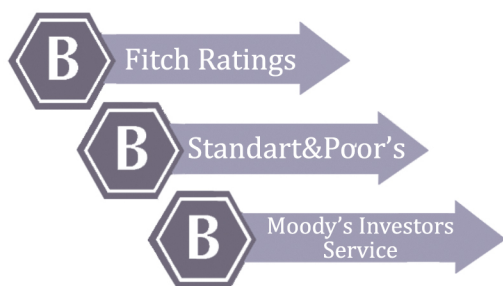
Belarus	36
Romania	38
Russia	42
Kazakhstan	48

* country performance by food indicator security, 2019

Human Development Index, 2019

Belarus	50
Bulgaria	52
Georgia	70
Ukraine	88

*Belarus belongs to the group of countries with high level of human development



*«B» - stable outlook



5.7
Dentists
per 10 000
population



Belarus
in **top 10**
of Lonely Planet
Best in Travel 2019



Belarus
in **top 25**
countries
favorable for
motherhood



BelAZ
450-ton
dump truck
twice entered into
the Guinness Book
of Records



Belarus is
world's
3rd largest
exporter
of potash
fertilizers

10 mln customers of EAEU



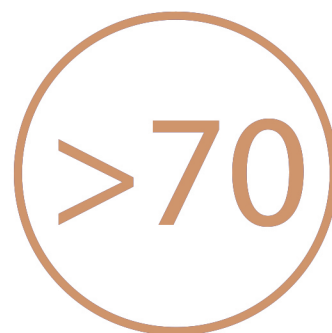
184 mln customers of Belarus

Investment agreement

Investment agreement with Belarus provides certain other benefits and additional governmental support.



agreements for promotion and mutual protection of investments



agreements on avoidance of double taxation

Visa-free regime

Visa-free travel to Belarus for 30 days for citizens of 70 + countries through the national airport. Visa-free travel to Brest and Grodno regions for 15 days for citizens of 70 + countries through 12 international checkpoints on the EU border.

Preferential Investment Regimes

Free Economic Zones

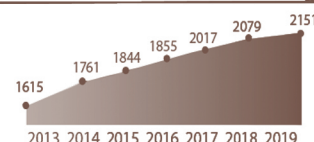
1. Exemption from income tax upon sale for export and to other residents of FEZ
2. Exemption from real estate tax on objects in the territory of FEZ for three years from the date of registration
3. Exemption from land tax and lease of land for the period of design and construction, but not more than 5 years from the date of registration. Exemption irrespective of the direction of their use (when sold for export and (or) to other residents of the FEZ)
4. Exemption from payment for the right to conclude a land lease agreement

*Minimum investment amount 0.5 million EUR

Investment agreement

1. VAT deduction in full
2. Exemption from import customs duties and taxes upon import into the Republic of Belarus of technological equipment, raw materials
3. Exemption from compensation for losses of forestry and agricultural production

Number of concluded investment agreements



Small towns

1. Exemption from income tax for 7 years from the date of registration, in the sale of goods (works, services) of own production
2. Real estate tax exemption for 7 years from the date of buildings registration
3. Exemption from import customs duties in respect of imported goods contributed to the authorized capital, from the date of manufacture of which no more than 5 years have passed on some commodity items
4. Exemption from income tax in respect of profit derived from the sale of goods of own production
5. Income tax exemption for 7 years

Southeastern region of the Mogilev region

1. Income tax - 10% for 7 years from the date of commencement of business
2. Pension insurance for entities - 24%, within 7 years from the start of business
3. Financing the costs of creating engineering and transport infrastructure for the implementation of projects in agriculture and industry

Industrial park "Great Stone"

1. Exemption from income tax for 10 years, and subsequently at a rate of 50% of the current in the republic
2. Real estate tax exemption
3. Land tax exemption
4. Rent exemption
5. Exemption from compensation for losses of forestry and agricultural production
6. Income tax for employees of residents of the park - 9% until 01/01/2027

Orsha district

1. VAT deduction in full when constructing and equipping facilities in the territory of Orsha district
2. Exemption from state duties for issuing special permits for the right to engage in labor activities in the Republic of Belarus to foreign citizens and stateless persons
3. Exemption from compensation for losses of forestry and agricultural production during the implementation of projects to create (expand) the production of goods (works, services)
4. Pension insurance for entities - 24%
5. Financial support of medium-sized enterprises at the expense of the regional budget

Preferential business terms for agricultural enterprises

1. Exemption from income tax, real estate tax, land tax, land rent, ecological tax
 2. Single tax for agricultural producers – 1% of the gross revenue
 3. Value added tax - 10%
 4. Payments to the Social Protection of Population Fund 30% instead of 34%
- *at least 50% of the revenue for the previous year was received from the sale of agricultural products



Favorable geographical location



103
thsd km
motorway total
length



6
international
airports,
9 airfields



5480
km
railway total
length



2067.4
km
length of inland
waterways



8
river ports

Belarus is crossed by the main Trans-European Transport Corridors (II West-East and IX North-South, with branching Corridor IXB). The country's beneficial geographical location determines its advanced transport infrastructure.

The Trans-European Transport Corridor with its branching opens direct access to the specialized sea ports of Klaipeda, Ventspils and Kaliningrad for cargo owners from Central Russia and Eastern Ukraine.

Distance to the ports of the Baltic Sea

- Riga-600 *km*
- Klaipeda-700 *km*
- Ventspils-760 *km*
- Tallinn-760 *km*
- Gdansk-900 *km*

20-foot container delivery charge (from Minsk)



State educational institutions of Belarus providing education in the field of animal breeding

Currently, higher education in animal breeding is provided by 4 higher education institutions subordinate to the Ministry of Agriculture and Food (33 specialties), secondary education - by 26 agricultural colleges subordinate to regional executive committees (26 specialties).

In total, 27,100 students are studying in higher education institutions, including 8,900 full-time and 3,400 part-time students at the expense of the budget. Every year, 1,800 specialists with higher education and 3,300 with specialized secondary education are sent to work in agricultural organizations.

The education system in Belarus is aimed at increasing the number of agricultural specialists with higher or specialized secondary education.

**Belarusian State
Agricultural Academy**

**Vitebsk State Academy
of Veterinary Medicine**

**Belarusian State Agrarian
Technical University**

**Grodno State
Agrarian University**



Research and practice centers in the field of animal breeding in Belarus

- **Republican unitary enterprise "Research and Practical Center of National Academy of Sciences of the Republic of Belarus for livestock"** - is the only scientific center in the country that conducts research in the field of selection, reproduction, keeping technology and effective rations for feeding farm animals.



- **Republican unitary enterprise "S.N. Vishelessky Institute of Experimental Veterinary Medicine"** – engaged in conducting fundamental and applied research in the field of veterinary medicine; developing methods for prevention and treatment of infectious, parasitic and non-communicable diseases of farm animals, birds, fish and bees.

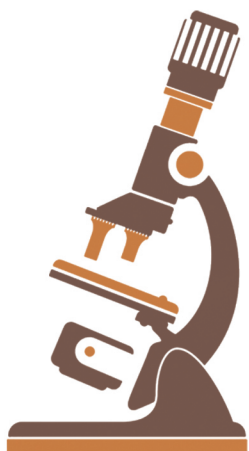


- **Republican unitary enterprise "Fisheries Institute"** - is a leading research center that leads and coordinates research work on fish farming in the Republic of Belarus.

- **Republican unitary enterprise "Experimental poultry science station"**. The poultry station was established in 1968 on the basis of the Zaslavsky poultry farm in the Minsk region. The purpose of its activity is the creation of new and improvement of existing lines and crosses of egg chickens, ducks and turkeys, the development of resource-saving technologies for the production of eggs and poultry meat, as well as norms, diets and methods of its feeding, participation in the creation of machines and equipment for poultry farming, implementation and maintenance advances in science and excellence in breeding and industrial poultry farming.

- **SE "ZhodinoAgroPlemElita"** is a large industrial agro-industrial complex of a new type, the basic economy of RUE "Scientific and Practical Center of the National Academy of Sciences of Belarus on Animal Husbandry". On the basis of high-tech innovative facilities of the enterprise, an agricultural scientific and technological polygon for animal husbandry and feed production has been formed and operates. Its specialists are working on bringing the latest scientific developments to the level of practical application and on actively introducing already completed advanced breeding and resource-saving technologies into agricultural production.

Innovations in animal husbandry



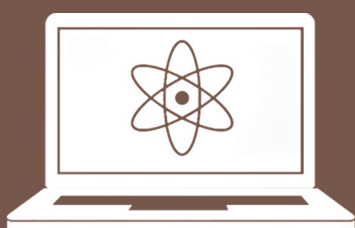
The Scientific and Practical Center of the National Academy of Sciences of Belarus on animal husbandry on the basis of cell and genetic engineering has developed: the technology of embryo transplantation in dairy and meat cattle breeding, which provides an increase in the number of quality embryos by 20-22% and yield of 55% of calves per 100 embryo transplants; the technology of cattle breeding using the fertilization outside the oocytes of highly productive cows, which allows reducing the cost of embryos by 2 times compared to obtaining them by the transplantation method.

Due to the use of modern methods of reproduction there have been developed and improved: the technology of reproduction of high-yielding cows, providing the reduction of gynecological diseases; the technology of pigs production, which allows the live weight gain of piglets 800 g per day; a complex program of forecasting the effect of selection of created pig genotypes and their combination ability, which allows to reduce by half material and labor costs in the selection work.

A number of technologies and project proposals for animal breeding facilities, for growing, fattening and producing animal products have been developed.

As a result, new competitive breeds and types of farm animals were developed. The achievements in animal breeding (breeds, types, lines) are not only a means of obtaining high quality animal products, but also an asset of the industry.

Digitalization in animal breeding



When receiving milk in milking parlors using computer technology, it is possible not only to find out how much milk a cow gives, but also to regulate the delivery of compound feed. In some new complexes, a responder is installed for each cow - a sensor that transmits information about the animal's activity to the computer. A special program provides information about the state of health and readiness for fertilization.

National Agency of Investment and Privatization

The Agency provides assistance for foreign investors interested in launching a business in Belarus:

- ▶ provision of information about investment opportunities, preferential regimes and benefits granted, economic sectors and legislation
- ▶ provision of up-to-date information about investment projects
- ▶ assistance in selection of sites and premises
- ▶ search for prospective partners for investment projects, arranging meetings and negotiations for establishing cooperation
- ▶ providing a platform for negotiations and support during negotiations
- ▶ organization of visits to the Republic of Belarus (schedule development, visa support)
- ▶ representation of investor's interests during negotiations with governmental representatives concerning implementation of investment projects, as well as improvement of doing business in the Republic of Belarus
- ▶ aftercare



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