



# Angus

Artimasis ir tolimasis užsienis.

# Angus Lietuvoje

<b>Viso Angusų Lietuvoje:</b>	<b>9791</b>
Buliukai:	2793
Telyčaitės:	3403
Karvės:	3595

# Angus Lietuvoje 2020 (prognozė)

<b>Angus Karvės:</b>	<b>apie 4000</b>
Atsiveda buliukų 1 pusmetį	apie 1000
Atsiveda telyčių 1 pusmetį	apie 1000
Atsiveda buliukų 2 pusmetį	apie 1000
Atsiveda telyčių 2 pusmetį	apie 1000

# Grynaveislių karvių skaičius

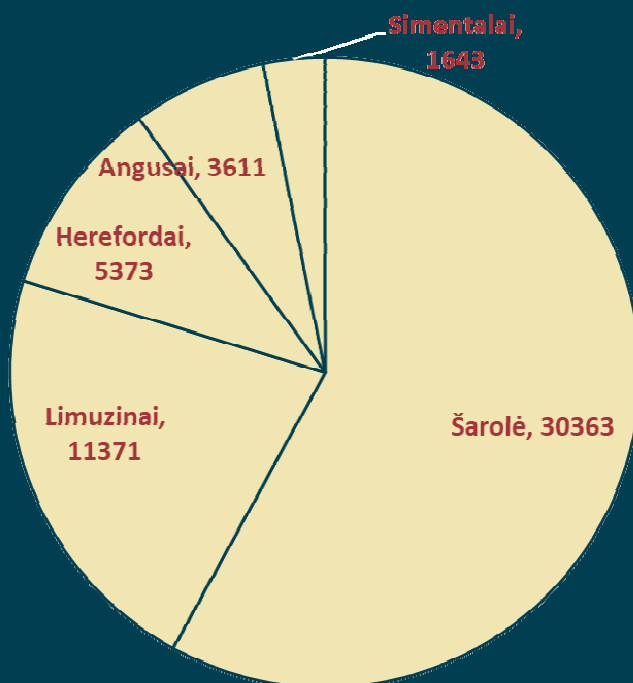
	<b>2018-01-01</b>	<b>2019-10-01</b>	<b>Augimas</b>
<b>Simentalai</b>	1166	1314	12.7%
<b>Herefordai</b>	603	687	13.9%
<b>Šarolė</b>	1834	2162	17.9%
<b>Aubrakai</b>	2163	2715	25.5%
<b>Limuzinai</b>	3045	3928	29.0%
<b>Angusai</b>	2556	3595	40.6%

# Galvijų skaičius Latvijoje

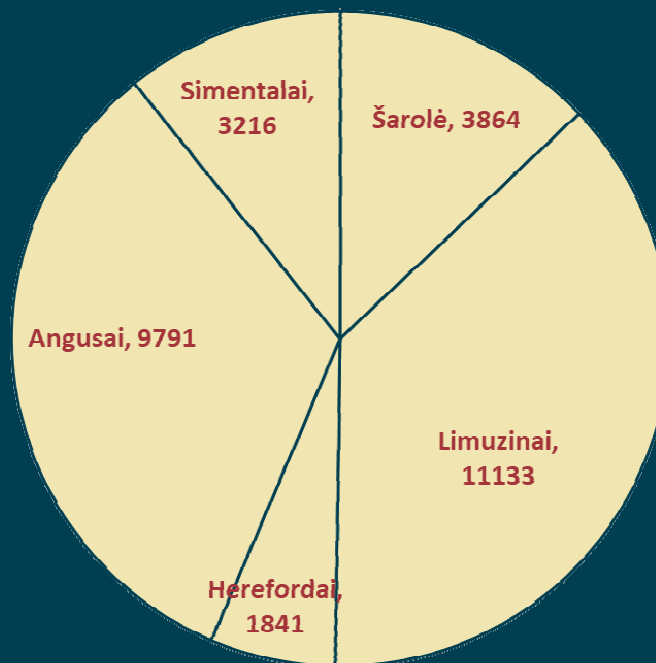
	Karvės/telyčios		Buliai		Augimas (karvių/telyčių)
	2018	2019	2018	2019	
Šarolė	23482	25029	4765	5334	6.6%
Limuzinai	7957	8710	2267	2661	9.5%
Herefordai	4624	4573	914	800	-1.1%
Angusai	2419	2634	749	977	8.9%
Simentalai	1346	1402	297	241	4.2%

# Pasiskirstymas pagal veisles

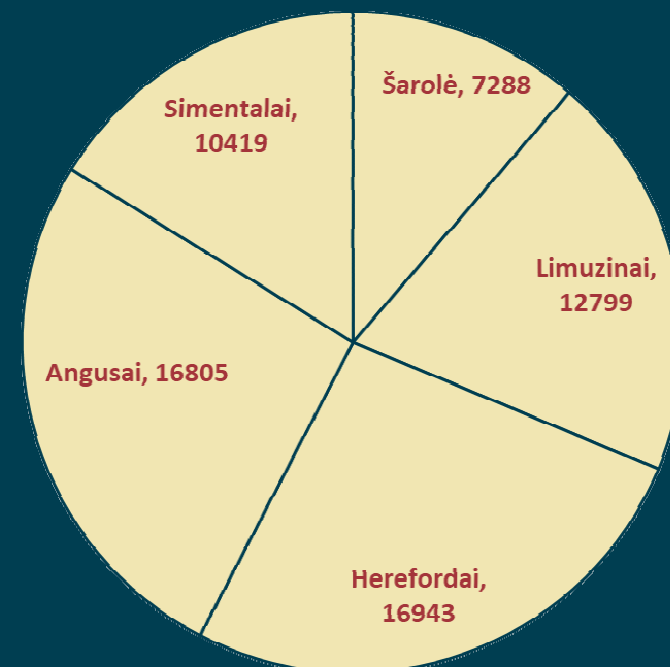
LATVIJA



LIETUVA



ESTIJA



# Liellopu izsoļu nams



# Liellopu izsoļu nams

	Aukcionai tenkanti dalis nuo bendro šalies mėsinių galvijų eksporto
<b>2014m.</b>	45.20%
<b>2015m.</b>	55.40%
<b>2016m.</b>	62.80%
<b>2017m.</b>	72.30%
<b>2018m.</b>	76.30%

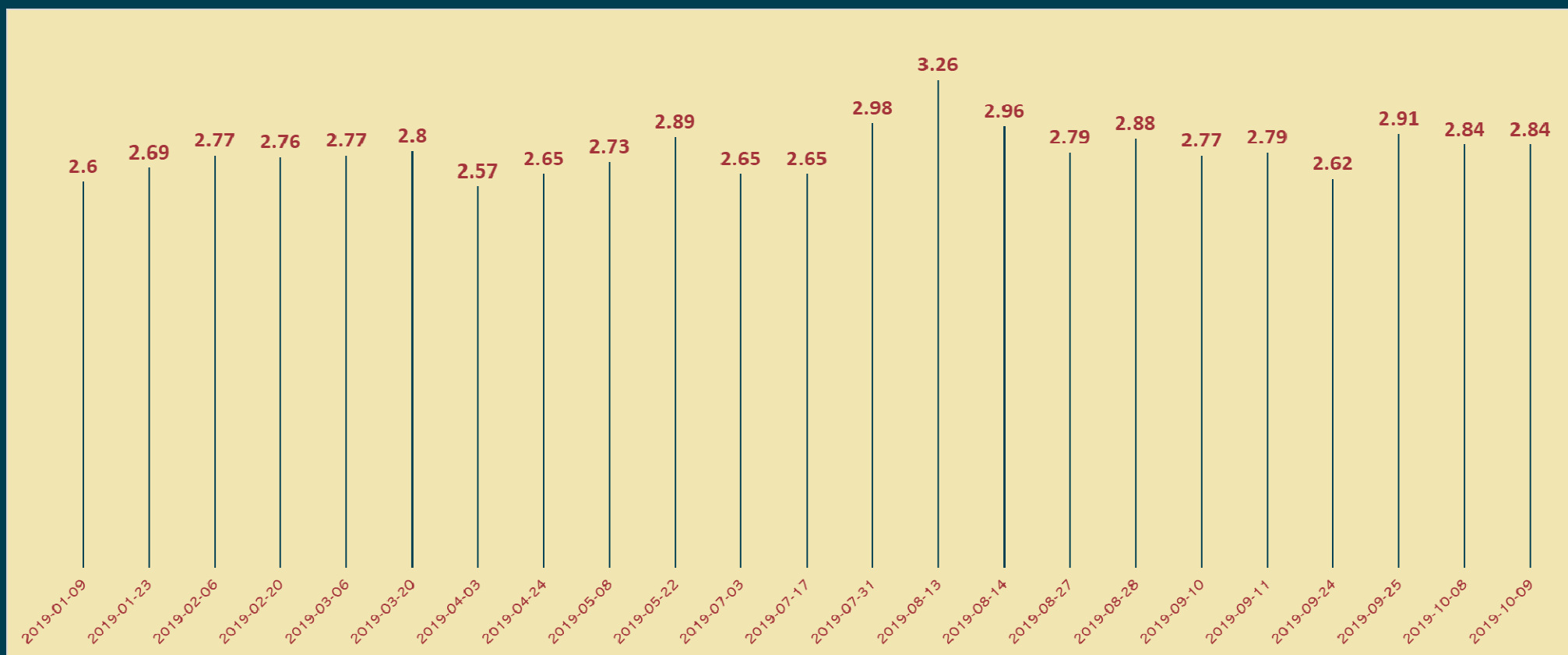


# Cattle Market

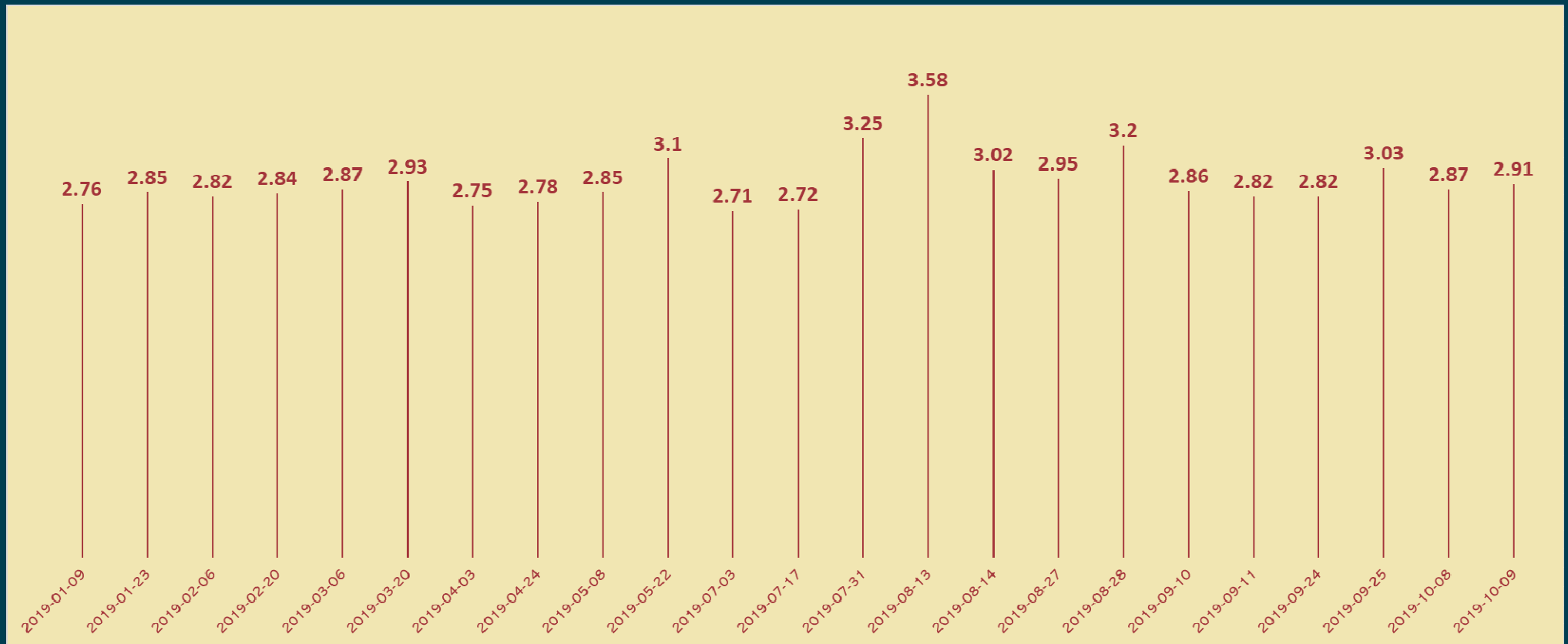




## Vidutinė buliukų pardavimo kaina CATTLE MARKET organizuojamame aukcione (Svorio kategorija – 250-300kg, veislės – šarolė/limuzinai ir šių veislių mišrūnai)



## Didžiausia buliukų pardavimo kaina CATTLE MARKET organizuojamame aukcione (Svorio kategorija – 250-300kg, veislės – šarolė/limuzinai ir šių veislių mišrūnai)





# Kaliningrado mėsos įmonė

# Kaliningrado mėsos įmonė

2012 – pirmieji Angus galvijai ūkyje

2013 – 12000 galvijų iš Kanzaso (USA)

...

2019 – 35000 Angus karvių atsiveda 31000 veršelių.

# Kaliningrado mėsos įmonė

2019 – 35000 Angus karvių atsiveda 31000 veršelių.

8000ha kukurūzų – 330000t siloso

3300ha kvietrugių/avižų/rugių – 18000t grūdų





Žemėlapis

Google



Uliasa Moložanava

Baltagroservis  
Балтагросервіс

Reka Tyrza

Žemėlapis

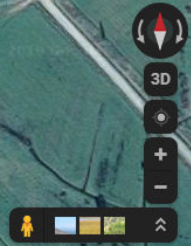
Google

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Žemėlapis

Google

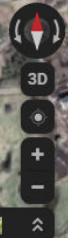




A198

Žemėlapis

Google





Емаhofas  
Богданово

Angrape

Žemėlapis

Google



Žemėlapis

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Žemėlapis

Per metus į apyvarta gražinama nuo 5000 iki 10000ha apleistų žemės plotų





Miratorg

# Miratorg

„There’s no place in the U.S., Australia or anywhere in the world that will have cattle as good as what they are putting together here“ - Anthony Stidham

# Miratorg

1,100,042,791€

94 fermos

2 penėjimo stotys

108000t mėsos per metus

# Miratorg

Aukšto lygio standartai, veterinarinė kontrolė,  
biosauga.

Moderni įranga.

Profesionalūs darbuotojai

# Miratorg

Tikslas:

Daugiau negu 1 000 000 Angus galvijų 2020m.







Žemėlapis

Google



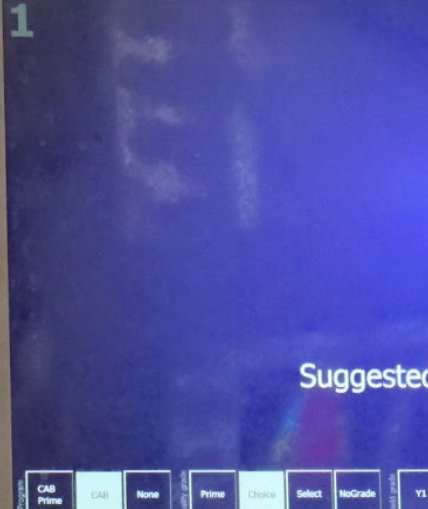
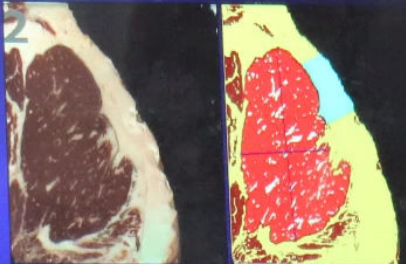


Žemėlapis

Vygonichsky District  
Briansko sritis, Rusija  
53.051423, 33.935026

Operator: M.Yasvarka 8/2/2017 3:02:28 PM

# 258491 ▾ HCW Maturity A

1  2 

**MD65 Choice**

REA 69.6 PYG 3.7 YG 3.75 FT 1.8cm

Suggested Program: CAB

CAB Prime	CAB	None	Prime	Choice	Select	NoGrade	Y1	Y2	Y3	Y4	Y5	NoGrade
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**Carcasses are graded according to USDA standards, with a direct internet link to Certified Angus Beef in Ohio, USA**

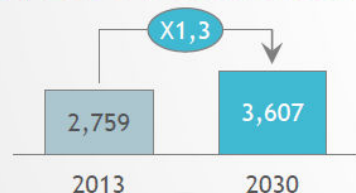
Marbling photo صور MARBLING	MIRATORG	USA		CANADA	JAPAN	AUSTRALIA	
	Miratorg beef grades فئات و أقسام اللحم البقري في ميراتورغ	USA beef grades فئات و أقسام اللحم البقري في الولايات المتحدة الأمريكية	USA marbling grades مستوى الترخيم في الولايات المتحدة الأمريكية	Canada beef grades فئات و أقسام اللحم البقري في كندا	Japan beef grades فئات و أقسام اللحم البقري في اليابان	Australia beef grades فئات و أقسام اللحم البقري في أستراليا	
	Prime	Prime	Extremely Abundant 0-49 بالغ الوفرة	Canada Prime	A 5	MB 8-9	
			Very Abundant 50-99 وفرة جداً			MB 7-8	
			Very Abundant 0-49 وفرة جداً			MB 6-7	
			Abundant وفرة			MB 5-6	
			Moderately Abundant متوسطة الوفرة			A 4	MB 4-5
			Slightly Abundant نادرة الوفرة				
	Top Choice	Choice	Moderate معتدلة	Canada AAA	A 3	MB 3-4	
	Choice		Modest متواضعة			MB 2-3	
			Small قليلة			A 2	MB 1-2
	Select	Select	Slight طفيفة	Canada AA	A 1	MB 0-1	
	—	Standart	Traces حد أدنى	Canada A	—	GF	

# Kazachstanas 2018-2027

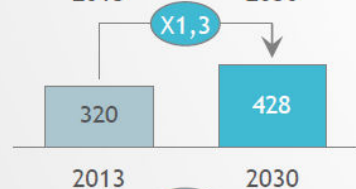
With current trends consumption of agro products will increase x1.3 by 2030 worldwide...



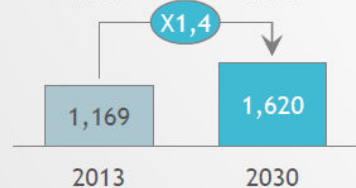
Cereals,  
M tons



Meat,  
M tons



Vegetables,  
M tons



... which will create a big challenge in the view of limited agro lands resources

- In 1980-2010 limited land sources were compensated with increased use of fertilizers and pesticides
- Total agro land area grew slowly with a shift from Europe and North America to Asia and Africa
- Further growth of agro lands is limited in most countries

Kazakhstan has a clear global advantage with its free agro lands

# Kazachstanas 2018-2027

## Key success factors for the industry



## Advantages of of Kazakhstan



Natural pastures



**5th place** in the world by pasture lands  
**30%** are used currently



Water at pastures



**110M ha** of pastures had ground and surface water

**6M** ha were supplied with wells & windmills in 5 years via the pastures irrigation program



Irrigation of crops



**11KM<sup>3</sup>** of water from rivers and melt-water might be used for crop irrigation on additional **2M ha**



Workforce

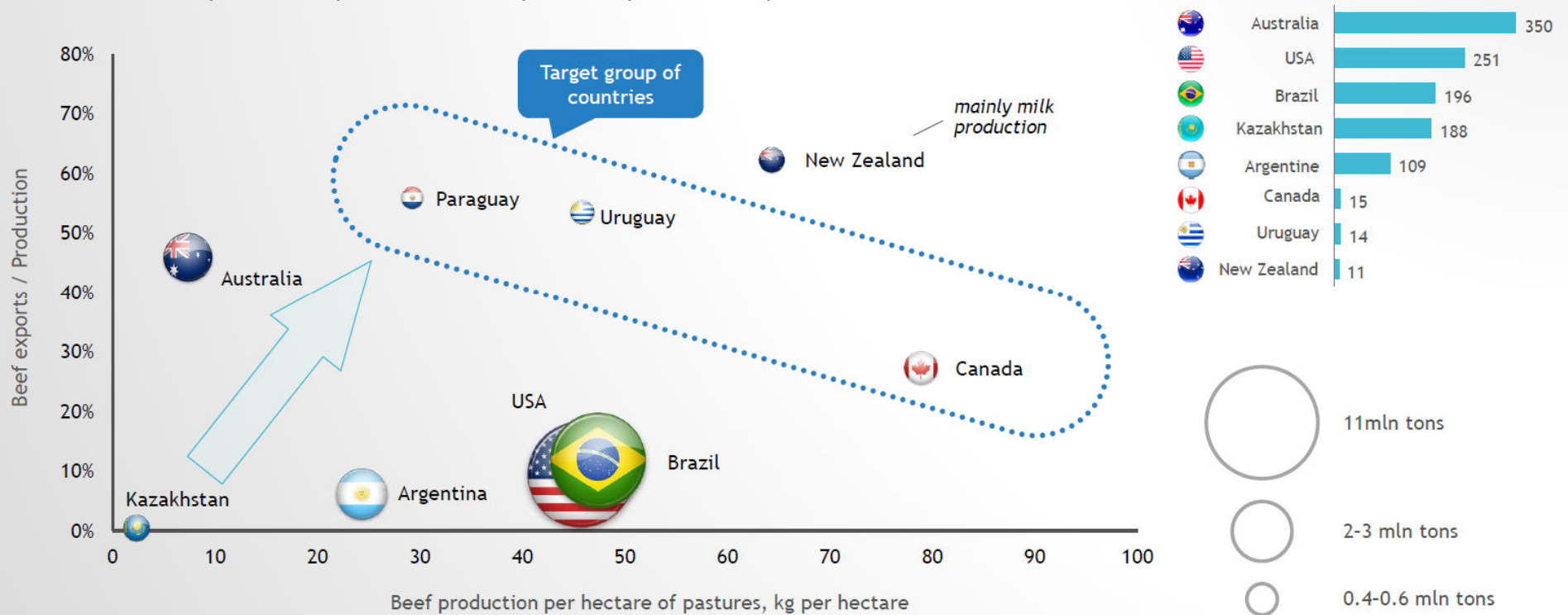


**45% population** live in rural areas

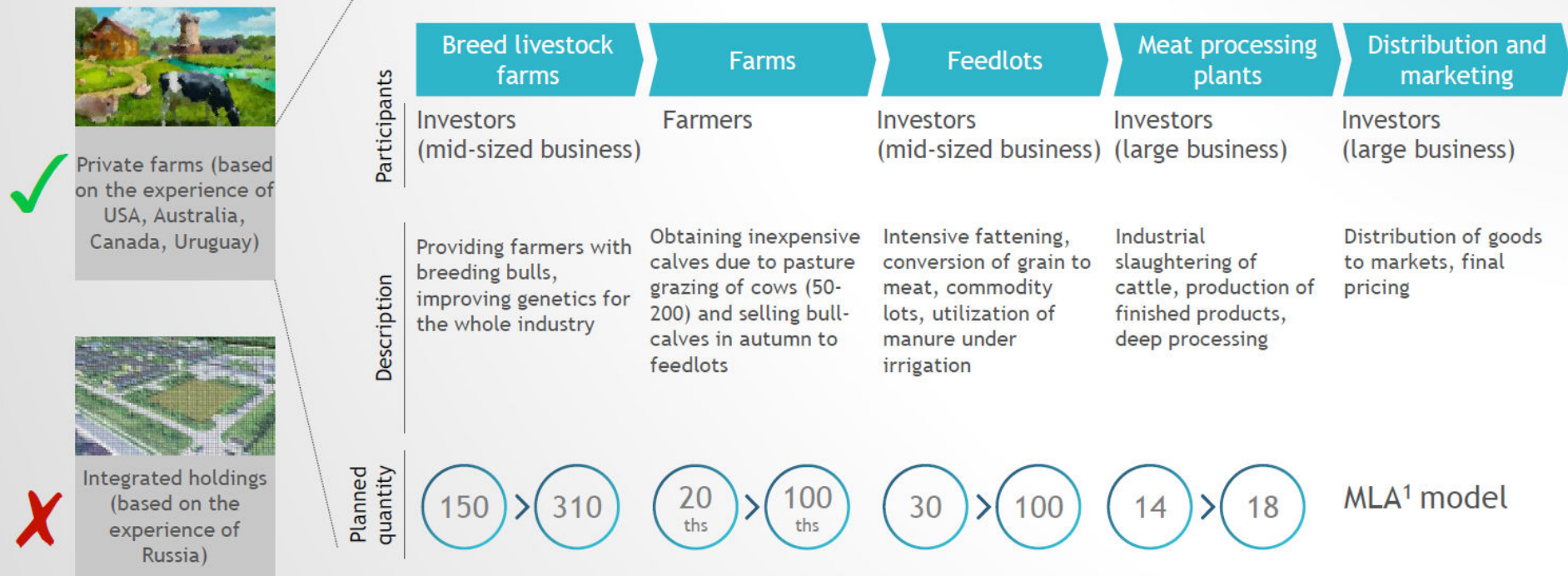
**2.5M people** are self-employed or unemployed

# Kazachstanas 2018-2027

Share of beef exports in total production vs. beef production per hectare of pastures



# Kazachstanas 2018-2027



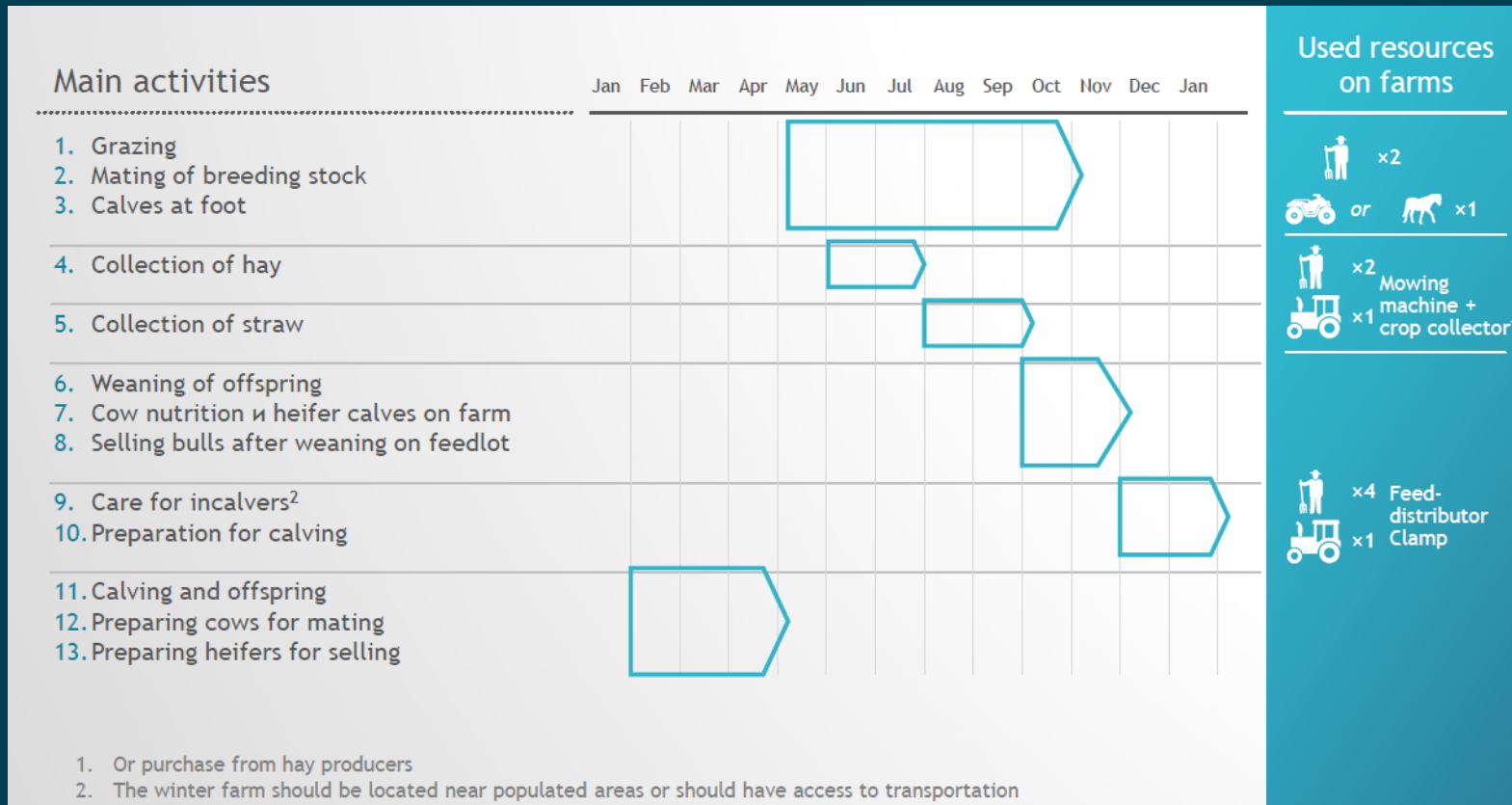
1. MLA - Meat and Livestock Australia. Business association of meat producers, which has representatives in the main export markets, where it promotes Australian products

# Kazachstanas 2018-2027





# Kazachstanas 2018-2027



# Kazachstanas 2018-2027

Centre of the cluster of 1000 farmers with 50.000 cows, buying 20 000 weaned bulls annually



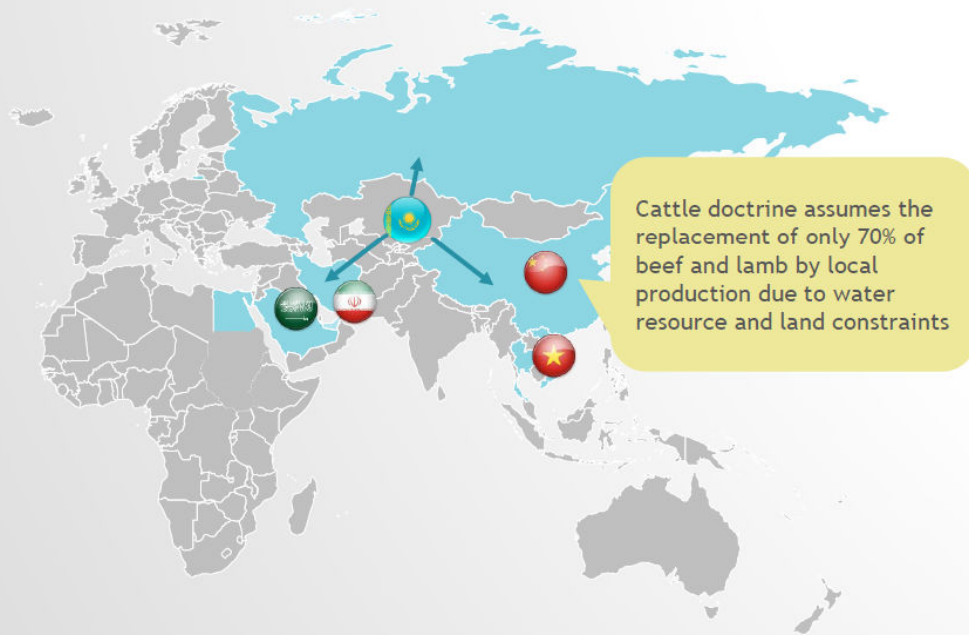
Sever-Agro feedlot for 14 000 heads,  
Kostanai region

## REFERENCE: DETAILED BEEF PRODUCTION IMPLEMENTATION PLAN

	Unit	1 step: Farms and land			2 step: Technologies and production			3 step: Leadership in exports			10 years	2028	
		2018	2019	2020	2021	2022	2023	2024	2025	2026			2027
New farms	ths	1	2	4	5	7	8	9	11	14	18	80	
Total farms	ths	1	3	7	13	20	28	37	48	62	80	80	80
Demand for broodstock	ths heads	50	100	220	260	348	402	451	549	716	901	3 997	
Cattle imports by years	ths heads	50	100	200	200	200	150	60			0	960	
<b>Total number of broodstock</b>	ths heads	<b>50</b>	<b>150</b>	<b>370</b>	<b>630</b>	<b>978</b>	<b>1 380</b>	<b>1 831</b>	<b>2 380</b>	<b>3 096</b>	<b>3 997</b>		<b>5 931</b>
Bulls from feedlots / capacity	ths heads		20	60	148	252	391	552	732	952	1 239	4 346	3 198
Beef export	ths tons	15	+6	+18	+44	+76	+117	+166	+220	+286	+372	1 304	879
Revenues from exports	USD mln	70	+30	+90	+222	+378	+587	+828	+1 099	+1 428	+1 858		4 397
Feedlots (x20.000 heads)	quantity	0	1	2	4	5	7	8	9	11	14	62	
Meat processing plants (x120.000 heads)	quantity	1			1			1		1		4	

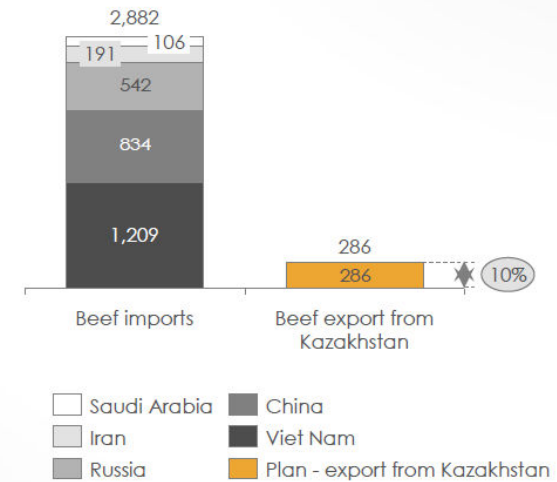
# Kazachstanas 2018-2027

## Targeted flows of cattle meat products



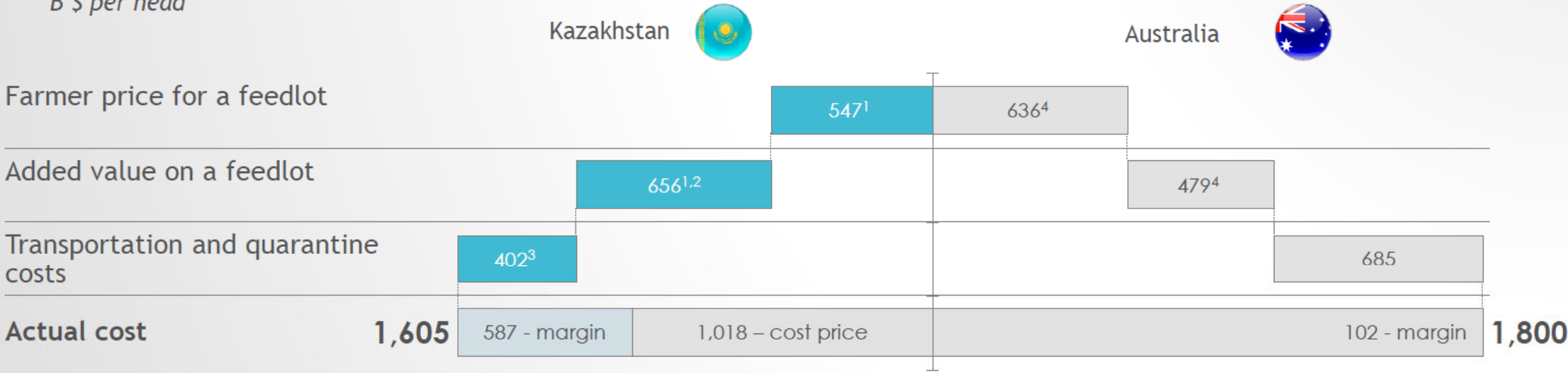
Kazakhstan can gain a 10% market share of beef imports

Beef import market of 5 targeted countries-importers in 2026, ths tons



# KAZAHSTAN HAS PRICE ADVANTAGE IN COMPARISON WITH AUSTRALIA IN BEEF SUPPLY TO CHINA 195\$/ HEAD

Price comparison on beef production stages (with delivery to China)  
*B \$ per head*



### Competitive advantages

- Free land
- Low labor costs
- Low taxes
- Low costs for irrigation feed
- High income of calves - 93% (Kazakhstan - 80%)
- Daily weight gain at feedlots - 1.7 kg (Kazakhstan - 1.4 kg)
- Developed transport infrastructure

• Kazakhstan has price advantages in delivery to China (195 USD per head)  
 • There is an additional margin stock in comparison with Australian beef at the expense of current high margin of Kazakhstan suppliers (587 USD per head, or 37%, versus 6% of Australian farmers)

1. Cost price 374, Depreciation (15 years, 4%) included. 2. Actual cost based on current price - 700 KZT/kg of live weight 3. Based on contract price with CITIC 4. According to MLA.COM.AU

## COST AND COMPETITIVENESS (EXAMPLE: EXPORTS TO CHINA)

#	USD
1. The cost price of a bull Angus (270 kg 205 days), 50 cows	374
1.0. Rate of return	80%
1.1. Cost of land	0
1.2. Wells in pastures (20 years) (subsidies 80%)	2,2
1.3. Farms for 50 cows (20 years)	16
1.4. Cost of a cow (10 years)	110
1.5. Costs for feed & operating costs	152
1.6. Interest & Tax & Amortization (15 years, 4%)	6,7%
1.7. The selling price of the feedlot (270 kg 205 days)	547
Profit and profitability	173 (46%)
<b>Cost per 1 kg of live weight</b>	1,38
The selling price from farmers to the feedlot for 1 kg of live weight	2,03
2. The cost of feeding a bull (280 kg to 550 kg, 210 days 1.3 kg)	444 (on top of 547)
2.1. Feeding area per head (including irrigation) (15years)	50
2.2. Feed & operating costs per head (210 days)	328
2.3. Interest & Tax & Amortization (15 years, 8%)	14%
2.4. Losses	3%
2.5. The selling price of live bulls (550 kg +), per head	1203
Profit and profitability	212 (48%)
<b>Cost per 1 kg of live weight</b>	1,8
The selling price from the feedlot for 1 kg of live weight	2,2

#	USD
3. Export of live bulls (China)	300
3.1. Quarantine (feeding area), per head	50
3.2. Transportation cost per head (Uch-Aral)	100
3.3. Quarantine, food and care in Uch-Aral	90
3.4. Transport costs to Alashankou, for the head	60
<b>Cost per 1 kg for logistics and export</b>	0,55
4. Net price in Alashankou, for 1 kg of live weight	2,73
Contract price (KMTIC) in <u>Alashankou</u> , for 1 kg of live weight	3,3
Contract price (KMTIC) in Alashankou, 550 kg bull	1815
The price for quarantine and processing	100
The selling price of the skin, offal, fat, bones, etc., behind the head	500

# Kazachstanas 2018-2027

Grynaveislių galvijų įsigijimas (Australia, USA, Canada and Europe) – 225000kzn (~525€)

Grynaveislių galvijų įsigijimas (Commonwealth of Independent States) – 225000kzn (~350€)

Kasmetinė išmoka už mėsinius galvijus – 10000kzn (~23€)

Kasmetinė išmoka už grynaveislius mėsinius galvijus – 20000kzn (~46€)

Parduodant buliukus didesnėms negu 1000 vietų penėjimo stotims – 200kzn/kg (~0,46€/kg)

Penint buliukus didesnėse negu 1000 vietų penėjimo stotyse už priesvorį 200kzn/kg (~0,46€/kg)

