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OPERATIONS IN 2014/15
BASIC FACTS

- One of leading companies in the food industry
- **Segments:** sugar, special products, CropEnergies, fruit
- World **number 1** in sugar production
- **18,500** employees
- **€ 6.8 bn** of annual turnover in 2014/15
- **5.3 mln t** of total sugar produced
- **Member of the MDAX®** (German stock exchange index)
- **Established** in 1926
- **www.suedzucker.de**
## OPERATIONS IN 2014/15
### SEGMENT OVERVIEW

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sugar Segment</strong></td>
<td>29 sugar factories and 3 refineries across Europe (Austria, Belgium, Bosnia and Herzegovina, Czech Republic, France, Germany, Hungary, Moldova, Poland, Romania and Slovakia)</td>
</tr>
<tr>
<td><strong>Special Products Segment</strong></td>
<td>BENEO Freiberger PortionPack Europe Starch</td>
</tr>
<tr>
<td><strong>CropEnergies Segment</strong></td>
<td>Bioethanol 4 production sites in Belgium, France, Germany and Great Britain</td>
</tr>
<tr>
<td><strong>Fruit Segment</strong></td>
<td>Fruit preserves Fruit juice concentrates 39 production sites worldwide</td>
</tr>
</tbody>
</table>
SUGAR SEGMENT
OVERVIEW

◆ Sugar factories
  ◦ Südzucker AG – Germany (9 sugar factories)
  ◦ Südzucker Polska – Poland (5 sugar factories)
  ◦ Südzucker Moldova – Moldova (2 sugar factories)
  ◦ Raffinerie Tirlemontoise – Belgium (2 sugar factories)
  ◦ Saint Louis Sucre – France (4 sugar factories, 1 refinery)
  ◦ AGRANA:
    ◦ Austria (2 sugar factories)
    ◦ Bosnia and Herzegovina (1 refinery)
    ◦ Czech Republic (2 sugar factories)
    ◦ Hungary (1 sugar factory)
    ◦ Romania (1 sugar factory, 1 refinery)
    ◦ Slovakia (1 sugar factory)

◆ Mauritius Sugar Syndicate
◆ ED&F Man – Great Britain (25% interest)
◆ Agriculture
◆ Soil Health Department
◆ Animal feed
◆ Agrar und Umwelt joint-stock company
◆ Agrana Studen Sugar Trading GmbH – Bosnia and Herzegovina (50% Joint Venture)
SUGAR SEGMENT
SUGAR PRODUCTION AREA AND 2014/15 CAMPAIGN

CORPORATION

- 29 sugar factories and 3 refineries all over Europe
- about 8,100 employees
- 34 million tonnes of beet processed
- 5.3 million tonnes* of sugar produced

*Including raw sugar refining

As of May 2015
SUGAR SEGMENT
2014/15 CAMPAIGN AND BEET YIELD*

Company
- 405,000 ha of cultivation area
- 84 t/ha beet yield

*Beet yield (t/ha) in the 2014/15 campaign (as compared to the 2013/14 campaign)
SUGAR SEGMENT

BEET PROCESSING AND SUGAR PRODUCTION*

<table>
<thead>
<tr>
<th>Year</th>
<th>Beet Processing (million t)</th>
<th>Sugar Production (million t)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011/12</td>
<td>31.3</td>
<td>5.4</td>
</tr>
<tr>
<td>2012/13</td>
<td>28.7</td>
<td>4.9</td>
</tr>
<tr>
<td>2013/14</td>
<td>27.2</td>
<td>4.7</td>
</tr>
<tr>
<td>2014/15</td>
<td>34.0</td>
<td>5.3</td>
</tr>
</tbody>
</table>

*Including raw sugar refining
SUGAR SEGMENT
MAURITIUS SUGAR SYNDICATE

- **Mauritius Sugar Syndicate** is the sole sugar sales and marketing organisation of Mauritian sugar producers.

- **Südzucker has signed an exclusive partnership agreement** with the Mauritius Sugar Syndicate to market up to 400,000 tonnes of top-quality sugar per annum in the EU (15,000 containers).

- **Südzucker has established a delivery and distribution infrastructure** between Mauritius and EU end customers.

- **The quantity of imported sugar:**
  - Strengthens the European distribution platform
  - Supports significant regions for Südzucker operations
  - Strengthens the market position in European deficit markets
SUGAR SEGMENT
ED&F MAN HOLDINGS LTD.

- **Südzucker Stake in ED&F Man:**
  25% minus one share

- **ED&F Man**
  - Founded in 1783
  - Over 4,000 employees in 60 countries
  - Headquartered in London

- **Operations**
  - Trading and participation in sugar production and refining
  - Marketing of coffee and molasses
  - Trading in biofuels and vegetable oils, shipping and financial services
SUGAR SEGMENT
AGRICULTURE

- **Managing** agricultural farms in Germany
- **New demands** in plants cultivation (e.g. organic beets)
  ◦ Research and development of cultivation methods, production techniques, soil cultivation, etc.
- **Creating agricultural holdings** in Chile, Moldova and Poland
  ◦ Securing raw material supply, field trials, knowledge transfers
- **Analysis of commodity markets** and development of concepts to secure the raw material supply for own processing facilities (e.g. sugar factories, bioethanol plants)
SPECIAL PRODUCTS SEGMENT
OVERVIEW

**BENEÖ Group**
- Functional ingredients for food applications
  - Fibre (inulin, oligofructose)
  - Rice derivatives (starch, flour, protein, bran)
  - Functional carbohydrates (Isomalt, Palatinose™)
  - Gluten from wheat
- Functional ingredients for non-food applications
  - Animal feed
  - Pharmaceuticals
- Facilities across the world (Belgium x 2, Chile, Germany, Italy)

**Freiberger**
- One of the leading producers of frozen products in Europe
  - Pizzas and snacks
  - Pastas
- 5 production facilities (Austria, Germany x 3, Great Britain)
- 15 production lines and 2.5m of products daily
SPECIAL PRODUCTS SEGMENT

OVERVIEW

**PortionPack Europe**
- Portioning, printing packages and distribution of products (no. 1 in Europe)
- Range of products for food and non-food applications
- 7 production facilities (Austria, Belgium, Czech Republic, Great Britain, Netherlands, Spain)
- Cooperation with Collaborative Packing Solution Ltd in South Africa

**AGRANA**
- Starch and special starch products for food and non-food applications
- One of leading European suppliers in the bio-sector
- Bioethanol and isoglucose production in Hungary
- 5 production facilities (Austria x 3, Hungary, Romania)
CROPENERGIES SEGMENT

OVERVIEW

❖ One of leading European producers
of bioethanol for the fuel sector

❖ The CropEnergies segment consists of:
  ◇ CropEnergies Bioethanol GmbH in Zeitz,
    Germany (annually: 360,000 m³ bioethanol,
    260,000 t ProtiGrain®)
  ◇ BioWanze S.A. in Brussels, Belgium
    (annually: 300,000 m³ bioethanol, 300,000 t
    ProtiWanze, 55,000 t gluten)
  ◇ Ryssen Alcools S.A.S. in Loon-Plage, France
    (annually: dehydration of 100,000 m³
    bioethanol, rectification of 80,000 m³
    bioethanol)
  ◇ Ensus Ltd. in Yarm, Great Britain (annually:
    400,000 m³ bioethanol, 350,000 t DDGS
    – protein animal feed, 250,000 t CO₂ delivered
    to a liquefaction plant)
  ◇ CT Biocarbonic (Joint Venture) in Zeitz, Germany
    (annually: 100,000 tonnes of liquefied CO₂)
  ◇ CropEnergies Inc. in Houston, USA

❖ Annual production capacity:
  ◇ About 1.2 mln m³ bioethanol
  ◇ About 700,000 t dry protein animal feed (DDGS)
  ◇ Over 300,000 t liquid animal feed
    (ProtiWanze®)
  ◇ 55,000 t gluten for food products
    and animal feed

❖ Bioethanol production in 2014/15
amounted to more than 1 mln m³

❖ Divisions in Brazil, Chile and USA
FRUIT SEGMENT

OVERVIEW

♦ AGRANA Fruit – production of fruit preserves
  ◦ Integration of all operations in AGRANA Fruit S.A.S. in Mitry-Mory, France
  ◦ World No. 1
  ◦ Fruit preserves for international food groups (dairy, ice-cream and baked goods industries)
  ◦ 25 production sites (Africa, Asia, Europe, North and South America)
  ◦ Innovation and product development centre in Tulln, Austria

♦ AUSTRIA JUICE – production of juice concentrates
  ◦ Integration of all operations in AUSTRIA JUICE GmbH in Kröllendorf, Austria
  ◦ No. 1 in Europe
  ◦ Production and marketing of high-value apple and berry juice concentrates, direct juices and purees
  ◦ 14 production sites (Asia, Europe)
RESEARCH AND DEVELOPMENT

♦ **Main focus**
  ◇ Developing new products and product variants
  ◇ Applicating technology in the food and non-food areas
  ◇ Optimizing production processes
  ◇ Testing new process technologies
  ◇ Sales and production support

♦ **Scope**
  ◇ Sugar and special sugars production technology
  ◇ Functional food ingredients (Isomalt, Palatinose™, rice derivatives, inulin and oligofructose, proteins)
  ◇ Pharmaceutical additives
  ◇ Starch and starch derivatives
  ◇ Fruit preserves
  ◇ Bioethanol

♦ **R&D budget in 2014/15: € 40.4 million**

♦ **About 400 employees worldwide**
SÜDZUCKER POLSKA S.A.

SÜDZUCKER POLSKA S.A.
OPERATIONS IN 2015/16

- Founded: 1997
- Share of Poland’s sugar quota: 25%
- Sugar plants: 5
- Sugar beet growers: 6,440
- Our brand: Cukier Królewski
OUR MISSION

We sow, produce and sell with passion!

Our goal is to produce sugar based on the highest competences and trust of our employees and beet growers.
We care for long-lasting relationships with our customers.
We act in harmony with the environment.
Piotr Chrobot
- Finance
- Balance Sheet
- Controlling
- Taxes
- Legal
- Sales
- Marketing
- PR / Communication
- Quality Management
- IT

Marek Wójcik
- Raw Materials / Agriculture
- Technology / Production
- Investments / Maintenance
- Locations
- Environmental Protection
- Bio-energy
- HR
- Work Safety
- Audit
- Procurement
- Archive
**ORGANIZATION**

- Headquarters: Wrocław
- Sales Office: Kraków
- Regional Sales Offices: Cerekiew, Ropczyce
- Production facilities

**Südzucker Polska S.A. Wrocław**

- Production facilities
  - Cerekiew Sugar Plant
  - Ropczyce Sugar Plant
  - Strzelin Sugar Plant
  - Strzyżów Sugar Plant
  - Świdnica Sugar Plant

**Map: Südzucker Polska S.A. Production Facilities**
PRODUCTION FACILITIES

First campaign: 1870

Key Investments
- Sugar end
- Beet yard
- Silo of 40,000 t capacity
- Waste water plant
- Sugar storage
- Boiler houses
- Massecuite III mixer
- Tank for thick juice and molasses
- Improved environmental standards
- Raw material room
PRODUCTION FACILITIES

Key Investments

- First campaign: 1979

Ropczyce Sugar Plant

- Separation unit
- Silo of 40,000 t capacity
- Packing unit
- Sugar end
- Beet yard

- Boiler house
- Sugar storage
- Tower extractor
- Improved environmental standards

Strzelin Sugar Plant

- First campaign: 1872

Key Investments

- Beet yard
- Central beet laboratory
- Silo of 50,000 t capacity
- Raw material room
- Tanks for thick juice and molasses
- Boiler house
- Waste water plant
- Modernisation of centrifuges: A, B, C
- Biogas plant
- Improved environmental standards
- Packing unit
- Sugar storage
PRODUCTION FACILITIES

Strzyżów Sugar Plant

- First campaign: 1901

**Key Investments**

- Beet yard
- Biological waste water plant
- Settling basin
- Boiler house
- Heat management
- Extraction unit
- Packing unit
- Improved environmental standards

Świdnica Sugar Plant

- First campaign: 1848

**Key Investments**

- Beet yard
- Heat management
- Extraction unit
- Boiler house
- Tower extractor
- Modernisation of centrifuges: B, C
- Waste water plant
- Modernisation of raw material room
- Improved environmental standards
OUR BRAND: CUKIER KRÓLEWSKI

AWARDS

The Cukier Królewski brand has long been trusted and popular among consumers. Its high quality has been recognised with awards from both retail customers and industry specialists.
OUR PRODUCTS
RETAIL

Cukier Królewski offers products for a variety of applications:

Sweetening
- White sugar
- White sugar cubes
- White lucky cubes
- White sugar in sticks
- Fine candy sugar

Decorating
- Icing sugar mill
- White coarse sugar crystals
- Nib sugar

Cane
- Cane sugar
- Cane fine sugar in a box with a cap
- Cane sugar cubes
- Bio cane sugar
- Cane sugar in sticks
OUR PRODUCTS
INDUSTRY

- White sugar
- Icing sugar
- Liquid sugar
- Nib sugar
- Basic fondant
- Specialist fondant
- Brown sugar
- Bio sugar
- Bee feed
  - Apiinvert
  - Apifonda
  - Apipuder
- Sugar beet molasses
- Beet pulp pellets
In 2014, Südzucker Polska S.A. expanded its business by including sales to the Foodservice sector. The company’s portfolio now includes a wide range of portion packed products for the out-of-home market.

- Breakfast products
- Sweets
- Hot drink condiments
- Spices
- Hotel items

At customer’s request, Südzucker Polska can accept private label orders.
Cukier Królewski corporate fan page ‘Życie jest słodkie’ (Life is sweet) has been launched on the social networking site facebook.com. It is a culinary profile that boasts a wide range of sweet recipes.

By joining our group of sweet life lovers, fans can share photos, links, photographs of their culinary adventures and inspirations.

Join us!
QUALITY

All our products are manufactured in accordance with the Good Manufacturing and Hygiene Practices as confirmed by certificates issued to SZP which confirm compliance with the requirements of:

- ISO 9001
- HACCP - Codex Alimentarius
- IFS Standard
- BRC Standard
- Kosher law
- Bio sugar marketing and storing
- ISCC (International Sustainability&Carbon Certification)
ENVIRONMENT
FACTS AND FIGURES

- Minimizing our adverse environmental impact by reducing:
  - Water and fuel consumption
  - Air pollution emissions
  - Waste produced
  - Noise emissions

- Preventing the risk of environmental accidents
- Improving existing environmental protection measures in accordance with relevant applicable laws

**Reduction of environmental nuisance in 2014 as compared with 2002 (in %)**

- Coal consumption: 64%
- Coke and anthracite consumption: 55%
- Dust emissions: 89%
- Water consumption: 75%
- NO₂ emissions: 66%
- SO₂ emissions: 44%
- CO emissions: 47%
Average beet yield and biological sugar yield

<table>
<thead>
<tr>
<th>Year</th>
<th>Average Beet Yield (t/ha)</th>
<th>Biological Sugar Yield (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/04</td>
<td>40.6</td>
<td>100%</td>
</tr>
<tr>
<td>04/05</td>
<td>42.1</td>
<td>100%</td>
</tr>
<tr>
<td>05/06</td>
<td>68.3</td>
<td>100%</td>
</tr>
<tr>
<td>06/07</td>
<td>79.7</td>
<td>100%</td>
</tr>
<tr>
<td>07/08</td>
<td>40.6</td>
<td>100%</td>
</tr>
<tr>
<td>08/09</td>
<td>42.1</td>
<td>100%</td>
</tr>
<tr>
<td>09/10</td>
<td>68.3</td>
<td>100%</td>
</tr>
<tr>
<td>10/11</td>
<td>79.7</td>
<td>100%</td>
</tr>
<tr>
<td>11/12</td>
<td>40.6</td>
<td>100%</td>
</tr>
<tr>
<td>12/13</td>
<td>42.1</td>
<td>100%</td>
</tr>
<tr>
<td>13/14</td>
<td>68.3</td>
<td>100%</td>
</tr>
<tr>
<td>14/15</td>
<td>79.7</td>
<td>100%</td>
</tr>
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</table>
## CAMPAIGN RESULTS

<table>
<thead>
<tr>
<th></th>
<th>Unit</th>
<th>10/11</th>
<th>11/12</th>
<th>12/13</th>
<th>13/14</th>
<th>14/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of beet growers</td>
<td></td>
<td>7,590</td>
<td>6,770</td>
<td>6,800</td>
<td>6,760</td>
<td>6,670</td>
</tr>
<tr>
<td>Beet amount</td>
<td>1,000 t</td>
<td>2,499</td>
<td>2,960</td>
<td>2,900</td>
<td>2,514</td>
<td>3,513</td>
</tr>
<tr>
<td>Beet yield</td>
<td>t/ha</td>
<td>56.7</td>
<td>67.0</td>
<td>66.1</td>
<td>64.8</td>
<td>79.7</td>
</tr>
<tr>
<td>Polarization</td>
<td>%</td>
<td>16.2</td>
<td>18.0</td>
<td>17.2</td>
<td>17.7</td>
<td>16.4</td>
</tr>
<tr>
<td>Campaign start</td>
<td></td>
<td>10.09.</td>
<td>10.09.</td>
<td>11.09.</td>
<td>18.09.</td>
<td>06.09.</td>
</tr>
<tr>
<td>Campaign duration</td>
<td>d</td>
<td>108</td>
<td>126</td>
<td>122</td>
<td>101</td>
<td>134</td>
</tr>
</tbody>
</table>
POLISH SUGAR MARKET
POLISH SUGAR MARKET

FACTS

Producers
- Krajowa Spółka Cukrowa
- Pfeifer & Langen Polska
- Südzucker Polska
- Nordzucker Polska

Locations
- Gdańsk
- Szczecin
- Poznań
- Wrocław
- Warszawa
- Kraków

Basic information
- Approximately **38.2m** consumers
- Annual sugar consumption: **ca. 38.5 kg** per capita
- Total sugar quota: 1,406m t (10.4% of sugar quota in EU₂₈)
- Poland is the **third largest** sugar producer in EU₂₈, after France and Germany

Share of sugar quota (%)
- 39.1%
- 26.4%
- 25.0%
- 9.4%
### POLISH SUGAR MARKET
#### FIGURES

<table>
<thead>
<tr>
<th></th>
<th>Unit</th>
<th>2004</th>
<th>2008</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beet area</td>
<td>1,000 ha</td>
<td>297</td>
<td>177</td>
<td>193</td>
<td>185</td>
<td>198</td>
</tr>
<tr>
<td>Number of beet growers</td>
<td>1,000</td>
<td>78</td>
<td>41</td>
<td>36</td>
<td>36</td>
<td>35</td>
</tr>
<tr>
<td>Beet yield</td>
<td>t/ha</td>
<td>42.5</td>
<td>48.0</td>
<td>63.7</td>
<td>60.8</td>
<td>68.3</td>
</tr>
<tr>
<td>Actual sugar yield</td>
<td>t/ha</td>
<td>6.8</td>
<td>7.2</td>
<td>9.6</td>
<td>9.6</td>
<td>10.4</td>
</tr>
</tbody>
</table>

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of sugar plants</td>
<td></td>
<td>43</td>
<td>19</td>
<td>18</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Average daily beet processing</td>
<td>1,000 t/d</td>
<td>160.7</td>
<td>102.2</td>
<td>104.6</td>
<td>109.9</td>
<td>110.4</td>
</tr>
<tr>
<td>Per sugar plant</td>
<td>t/d</td>
<td>4,330</td>
<td>5,175</td>
<td>5,810</td>
<td>6,105</td>
<td>6,130</td>
</tr>
<tr>
<td>Campaign duration</td>
<td>d</td>
<td>78</td>
<td>86</td>
<td>118</td>
<td>102</td>
<td>122</td>
</tr>
<tr>
<td>Sugar production</td>
<td>1,000 t</td>
<td>2,002</td>
<td>1,275</td>
<td>1,864</td>
<td>1,778</td>
<td>2,046</td>
</tr>
</tbody>
</table>
POLISH SUGAR MARKET FACING CHANGES IN 2017

**Strengths**
- Very good conditions for beet growing
- Good raw material supply
- Great production and export potential
- Very strong concentration in the sugar industry
- Economies of scale
- High business effectiveness of factories
- Low production costs
- Oligopolistic market structure

**Weaknesses**
- Lower technical and business effectiveness compared with major EU sugar producers
- Lower beet yield compared with major EU sugar producers
- Fragmentation and location of some plantations
- Lower competitiveness compared with cane sugar producers

Source: Polish Association of Sugar Producers
POLISH SUGAR MARKET FACING CHANGES IN 2017

Opportunities

♦ Freedom to produce sugar without administrative volume limits
♦ No volume limits on exports
♦ Entire production may be used for consumption
♦ Innovation growth
♦ Increased global demand for sugar
♦ Improved business effectiveness of factories
♦ Increased raw material production yield
♦ Continued optimisation of raw material supply

Threats

♦ Possible oversupply
♦ Increased competition among sugar producers
♦ Further trade agreements providing preferential market access
♦ Competition from producers of other sweeteners (isoglucose)
♦ Increased imports by major EU sugar producers
♦ Greater production volatility
♦ Greater price volatility
♦ Unfavourable trend of reducing sugar consumption

Source: Polish Association of Sugar Producers
EU SUGAR MARKET
EU SUGAR MARKET

FACTS

- **2014/15 beet campaign**
  - Very high sugar beet crops
  - High sugar production again
  - In some countries, sugar prices went down to production cost levels or less
- High sugar production and import regulations give rise to worrying sugar market conditions (dramatic decrease in sugar prices)
- The European Commission rejected sugar producers’ proposals on how to address the current sugar market conditions
- Each major sugar producer announces its intention to increase sugar production after 2017

- **Current market forecast in respect of possible developments after 2017**
  - Sugar exports to rise to 3.0 million t (currently 1.3 million t)
  - Sugar imports to fall to 0.5 million t (currently 3.2 million t)
  - Sugar production at 19 million t (today’s sugar quota and out-of-quota sugar amount)
EU SUGAR MARKET
SUGAR QUOTAS

France
Germany
Poland
Great Britain
Netherlands
Belgium
Italy
Spain
Czech Republic
Denmark
Austria
Sweden
Croatia
Greece
Slovakia
Hungary
Romania
Lithuania
Finland
France DOM,*
Portugal Açores**

1,000 t 0 200 400 600 800 1000 1200 1400 1600 1800 2000 2200 2400 2600 2800 3000

* DOM = département d'outre-mer  ** Açores = the Azores
## EU CAMPAIGN 2014/15

<table>
<thead>
<tr>
<th></th>
<th>2013/14*</th>
<th>2014/15**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beet area</strong></td>
<td>1.51m ha</td>
<td>1.56m ha</td>
</tr>
<tr>
<td><strong>Number of beet growers</strong></td>
<td>145,000</td>
<td>144,000</td>
</tr>
<tr>
<td><strong>Beet yield</strong></td>
<td>69.0 t/ha</td>
<td>81.0 t/ha</td>
</tr>
<tr>
<td><strong>Beet amount</strong></td>
<td>104m t</td>
<td>129m t</td>
</tr>
<tr>
<td><strong>Technical sugar yield</strong></td>
<td>11.1 t/ha</td>
<td>12.1 t/ha</td>
</tr>
<tr>
<td><strong>Sugar quota</strong></td>
<td>13.53m t</td>
<td>13.53m t</td>
</tr>
<tr>
<td><strong>Sugar production</strong></td>
<td>16.73m t</td>
<td>19.41m t</td>
</tr>
<tr>
<td>– Of which cane sugar</td>
<td>0.43m t</td>
<td>0.49m t</td>
</tr>
<tr>
<td><strong>Sugar carried forward from the previous campaign</strong></td>
<td>0.67m t</td>
<td>0.56m t</td>
</tr>
<tr>
<td><strong>Out-of-quota sugar</strong></td>
<td>3.34m t</td>
<td>6.41m t</td>
</tr>
<tr>
<td><strong>Isoglucose production</strong></td>
<td>0.72m t</td>
<td>0.72m t</td>
</tr>
</tbody>
</table>

* Figures: European Commission, CEFS, Bartens

** European Commission and SZP calculations preliminary figures
## EU CAMPAIGN 2014/15

DATA FROM COUNTRIES WITH THE LARGEST SHARE IN THE SUGAR QUOTA

<table>
<thead>
<tr>
<th>Country</th>
<th>Beet area in 1.000 ha</th>
<th>Actual sugar yield in t/ha</th>
<th>Sugar production in 1.000 t</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2013/14</td>
<td>2014/15*</td>
<td>2013/14</td>
</tr>
<tr>
<td>France**</td>
<td>361</td>
<td>371</td>
<td>12.6</td>
</tr>
<tr>
<td>Germany</td>
<td>335</td>
<td>348</td>
<td>11.1</td>
</tr>
<tr>
<td>Poland</td>
<td>185</td>
<td>198</td>
<td>9.6</td>
</tr>
<tr>
<td>Great Britain</td>
<td>106</td>
<td>103</td>
<td>11.6</td>
</tr>
<tr>
<td>Netherlands</td>
<td>73</td>
<td>76</td>
<td>12.9</td>
</tr>
<tr>
<td>Belgium</td>
<td>62</td>
<td>60</td>
<td>12.7</td>
</tr>
<tr>
<td>EU28</td>
<td>1,512</td>
<td>1,558</td>
<td>11.1</td>
</tr>
</tbody>
</table>

| Share of largest six | 74% | 74% | 105% | 108% | 73% | 75% |

* European Commission preliminary figures  
** Excl. overseas departments
PRICES DEVELOPMENT ON EU SUGAR MARKET

Figures: June 2015

London, white sugar world price  EU white sugar ex-work  Raw sugar EU import  Referential price
EU SUGAR MARKET POLICY
MARKET FRAMEWORK TO/FROM 2017

Sugar market policy until 30 September 2017
- Quota system for sugar and isoglucose remains
- Quota sugar: minimum sugar beet price
- Mandatory arrangements between the industry and growers
- Temporary market measures:
  ◦ Intervention purchases, replacement of out-of-quota sugar with quota sugar, import auctions
- Exports limited to 1.35m t/year

New market framework from 1 October 2017
- Quota system for sugar and isoglucose abolished
- Minimum sugar beet price abolished
- Mandatory agreements between the industry and growers
- Temporary market measures:
  ◦ Obligations: private storage of sugar, special assumptions in case of crisis
- Export limits lifted

Access to EU market for non-EU countries remains unchanged
- Import duties for non-preferred countries from EUR 419/t for white sugar and EUR 339/t for cane sugar
- Existing preferential access FTAs with LDC/ACP countries with no volume limit
- Existing preferential access imports free from or with reduced tariffs, with a volume limit
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