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OPERATIONS IN 2016/17

Basic Facts

- One of **the leaders** in the food industry
- **Segments:** sugar, special products, CropEnergies, fruit
- World **number 1 in sugar production** in 2016/17
- About **100 plants** worldwide
- Uses **34 m t** of agricultural raw materials
- **4.7 m t** of total sugar production
- About **16,900** employees
- € **6.5 bn** of annual turnover
- Established in **1926**
- Member of the German **MDAX®**
# OPERATIONS IN 2016/17

## Segment Overview

### Sugar Segment
- 29 sugar factories and 2 refineries across Europe (Austria, Belgium, Bosnia and Herzegovina, Czech Republic, France, Germany, Hungary, Moldova, Poland, Romania and Slovakia)

### Special Products Segment
- **BENO**  
  Freiberger  
  PortionPack Europe  
  Starch  
  21 production plants worldwide

### CropEnergies Segment
- Bioethanol  
  4 production plants in Belgium, France, Germany and Great Britain

### Fruit Segment
- Fruit preserves  
  Fruit juice concentrates  
  39 production plants worldwide
SUGAR SEGMENT
Overview

Sugar factories
- Südzucker AG – Germany
- Südzucker Polska – Poland
- Südzucker Moldova – Moldova
- Raffinerie Tirlemontoise – Belgium
- Saint Louis Sucre – France
- AGRANA:
  - Austria
  - Bosnia and Herzegovina
  - Czech Republic
  - Romania
  - Slovakia
  - Hungary

Other domains
- ED&F Man Holdings Ltd.
- Agriculture
- Soil Health Department
- Animal feed and other by-products
- Distribution partnerships in Great Britain, Greece, Israel, Italy and Spain
- Studen Group (including sugar production in Bosnia)
- Maxi S.r.l. (joint venture in Italy)
**SUGAR SEGMENT**

Locations and Campaign

**Group (2016/17)**
- About 385,000 ha of cultivation area
- About 39,370 growers
- 28.6 m t of beet processed
- 29 sugar factories and 2 refineries
- About 7,000 employees
- 4.7 m t* of sugar produced

*Including sugar refining

---

**Share in sugar production (%)**

- Südzucker
- Raffinerie Tirlemontoise
- Saint Louis Sucre
- AGRANA

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**Locations and Campaign**

- Belgium
- France
- Germany
- Poland
-Świdnica
- Warburg
- Brottewitz
- Wabern
- Offstein
- Ochsenfurt
- Plattling
- Warburg
- Zetz
- Opava
- Opava
- Leopoldsdorf
- Tulln
- Ropczyce
- Ropczyce
- Cerekiew
- Cerekiew
- Opava
- Sered
- Kaposvár
- Roman
- Roman
- Buzau
- Buzau
- Brčko
- Brčko
- Hrusovany
- Hrusovany
- Leopoldsdorf
- Leopoldsdorf
- Tulin
- Tulin
- Slovakia
- Slovakia
- Austria
- Austria
- Hungary
- Hungary
- Czech Republic
- Czech Republic
- Croatia
- Croatia
- Austria
Beet yield in t/ha (previous year)
SUGAR SEGMENT
Beet Processing and Sugar Production

<table>
<thead>
<tr>
<th>Year</th>
<th>Beet Processed in m t</th>
<th>Sugar Production in m t (including sugar refining)</th>
</tr>
</thead>
<tbody>
<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>
<tr>
<td>2015/16</td>
<td>23.7</td>
<td>4.1</td>
</tr>
<tr>
<td>2016/17</td>
<td>28.6</td>
<td>4.7</td>
</tr>
</tbody>
</table>
SUGAR SEGMENT
ED&F Man Holdings Ltd.

- Südzucker stake is 35% minus one share
- Based in London
- About 6,900 employees
- Established in 1783
- Business activity in 60 countries
  - Sugar: trading, participation in production and refining
  - Marketing of coffee and molasses
  - Trading in grains, pulses and vegetable oils
  - Shipping and financial services
Managing farms in Chile, Germany, Moldova and Poland
- Cultivation of e.g. wheat, beet, maize, chicory, rapeseed and soybean
- Partly organic cultivation (e.g. organic beet) and organic turkey fattening

New challenges in plant cultivation
- Research and improvement of cultivation methods, production techniques, soil cultivation, etc.

Analysis of commodity markets and design of ideas to secure raw material supply
SPECIAL PRODUCTS SEGMENT

Overview

**BENEO Group**
- Production and marketing of technological and functional/dietetic ingredients for food and non-food applications
  - Natural dietary fibres (inulin, oligofructose)
  - Functional carbohydrates (Isomalt, Palatinose™)
  - Rice derivatives (starch, flour, protein, bran)
  - Gluten from wheat
- Important applications
  - Meat alternatives, beverages, pastry, infant food, grain food, dairy products, sweets, soups and sauces
- 5 production plants (Belgium x 2, Chile, Germany and Italy)
- Business activity in more than 70 countries (Asia, Europe, North and South America) with over 900 employees

**Freiberger Group**
- One of Europe’s leading producers of frozen products (market share: e.g. 17% in frozen pizzas and 18% in chilled pizzas)
- 15 production lines and up to 2.5 m of products daily (pizzas, snacks and pastas)
- New product in 2016/17: gluten-free frozen pizza
- 5 production plants (Austria, Germany x 3, Great Britain)
- Sales markets: international chain stores in Europe, United States and Canada
PortionPack Europe
- No. 1 in Europe - portioning, printing packages and distribution of products
- Product range for food and non-food applications
- 7 localisations, including 5 plants (Austria, Belgium, Czech Republic, Germany, Great Britain, Netherlands, Spain)
- Cooperation (minority share) with Collaborative Packing Solution Ltd (CoSo) in South Africa

Starch (AGRANA and Südzucker)
- Starch and special starch products for food and non-food applications
  - Food, beverage and tobacco industry, infant nutrition, paper-making, textile industry, chemical building materials, pharmaceuticals and cosmetics
- One of leading European suppliers in the bio-sector (products and bioethanol)
- 6 production plants (Austria x 3, Germany, Romania and Hungary with isoglucose production)
- New wheat starch production plant in Zeitz since 2016
- Important supplier of specialty corn and GMO-free corn products
One of leading producers of bioethanol in Europe

Bioethanol production in 2016/17 amounted to 1.0 m m³

Members of the CropEnergies Group:
- CropEnergies Bioethanol GmbH in Zeitz, Germany (400,000 m³ bioethanol, 60,000 m³ alcohol, 300,000 t ProtiGrain® and 100,000 t liquefied CO₂ per year)
- BioWanze SA in Wanze, Belgium (300,000 m³ bioethanol, 350,000 t ProtiWanze® and 55,000 t gluten per year)
- Ryssen Alcools SAS in Loon-Plage, France (dehydration of 100,000 m³ bioethanol (fuel) and rectification of 90,000 m³ bioethanol (technical use) per year)
- Ensus UK Ltd. in Yarm, United Kingdom (400,000 m³ bioethanol, 350,000 t DDGS (protein animal feed) and 250,000 t CO₂ delivered to a liquefaction plant per year)
- CT Biocarbonic (Joint Venture) in Zeitz, Germany (100,000 t liquefied CO₂ for food and non-food applications per year)
- CropEnergies Inc. in Houston, USA

Trading companies in Brazil, Chile and United States
FRUIT SEGMENT
Overview

◆ AGRANA Fruit
  ◦ Production of fruit preserves – no. 1 in the world
  ◦ Integration of all operations in AGRANA Fruit S.A.S. in Mitry-Mory, France
  ◦ 25 production plants in Africa, Asia, Europe, North and South America
  ◦ Innovation and product development centre in Tulln, Austria

◆ AUSTRIA JUICE
  ◦ Production of apple juice concentrates – no. 1 in Europe (also production of direct juices and purées)
  ◦ One of the leading producers of berry juices in the world
  ◦ Integration of all operations in AUSTRIA Juice GmbH in Kröllendorf, Austria
  ◦ 14 production plants in Asia and Europe
RESEARCH AND DEVELOPMENT

- **Main focus**
  - Developing new products and product variants
  - Food and non-food application technology
  - 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, oligofructose and proteins)
  - Pharmaceutical additives
  - Starch and starch derivatives
  - Fruit preserves
  - Bioethanol and green chemicals

- **R&D budget for 2016/17: € 41.8 m**
- **About 400 employees worldwide**
OPERATIONS IN 2017/18

- Founded: 1997
- Share of Poland’s sugar quota: 25%*
- Sugar beet growers: 6,216
- Employees: 620
- Sugar plants: 5
- Our brand: Cukier Królewski

* Quota system abolished from 1st October 2017
OUR MISSION

We sow, produce and sell with passion!

Our goal is to produce high quality sugar on the basis of the highest competence and trust of our employees and growers.
MANAGEMENT BOARD

Piotr Chrobot
- Finance
- Balance Sheet
- Controlling
- Taxes
- Legal
- Sales
- Marketing
- PR/Communication
- Quality Management
- IT

Marek Wójcik
- Raw Materials/Agriculture
- Technology/Production
- Investments/Repairs
- Environmental Protection
- HR
- Work Safety
- Audit
- Procurement
- Archive
ORGANISATION AND LOCATIONS

- Headquarters: Wrocław
- Sales Office: Kraków
- Production plants

Südzucker Polska S.A. Wrocław

Production plants

Cerekiew Sugar plant  Ropczyce Sugar plant  Strzelin Sugar plant  Strzyżów Sugar plant  Świdnica Sugar plant
PRODUCTION PLANTS

- First campaign in 1870

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

Ropczyce Sugar Plant

- First campaign in 1979

Key Investments
- 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 in 1872

Key Investments
- Beet yard
- Central beet laboratory
- Silo of 50,000 t capacity
- Beet end
- 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 PLANTS

Strzyżów Sugar Plant

- First campaign in 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 in 1848

Key Investments

- Beet yard
- Heat management
- Extraction unit
- Boiler house
- Tower extractor
- Modernisation of centrifuges B & C
- Waste water plant
- Beet end
- 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. Cukier Królewski is a multiple winner of the Golden Consumer’s Laurel in the years 2012–2017. The brand was also awarded the elite jubilee title of Consumer’s Laurel – Leader of the Decade (2004–2014).
OUR PRODUCTS

Retail

Cukier Królewski offers a range of products for a variety of applications:

**Sweetening**
- White sugar
- White sugar cubes
- White lucky cubes
- White sugar in sticks
- Crushed candy sugar

**Baking**
- Fine sugar
- Icing sugar
- White fine sugar in a box with a cap

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

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

Industry

- White sugar
  - Unsegregated
  - Segregated
  - Class 1 refined sugar
- Icing sugar
- Liquid sugar
- Nib sugar
- Fondant
  - 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 for 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 offers personalized solutions.
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 boasting a wide range of sweet recipes.

Our video recipes published on our fanpage are also available in our YouTube channel with the same name. Fans who follow us on Instagram are up to date e.g. with our video series “Słodsze niż słowa – przepisy Ani Starmach” (Sweeter than words: recipes of Ania Starmach) by Cukier Królewski’s ambassador.

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

Join us!
All our products are manufactured in accordance with the Good Manufacturing and Hygiene Practices. Certificates issued to SZP confirm compliance with the requirements of:

- **ISO 9001**
- **HACCP Standard**
- **IFS and BRC Standards**
- **REDcert2**
- **GMP+**
- **Kosher and halal laws**
- **Bio sugar distribution and storage**
- **International Sustainability & Carbon Certification**
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

Reduction of negative environmental factors (2003/04 = 100%)

- SO₂ emissions
- CO emissions
- NO₂ emissions
- Water consump.
- Dust emissions

2003/04 campaign
2016/17 campaign
Climate change and reduction of carbon dioxide emissions are two of our priorities. Responsible operation means that we use modern technologies and upgrade our production processes to reduce the consumption of electricity and other resources.

Reduction of the consumption of resources (2003/04 = 100%)
OUR PARTNERS

- We are always in touch with our key partners in beet cultivation — beet growers.

- Sugar beets are the basic raw material used in sugar production. Together with our beet growers, we do our best to make beet cultivation sustainable and environmentally friendly.

- Thanks to our commitment and good cooperation with beet growers, we pay special attention to soil protection, use of pesticides and fertilisers as required, optimisation of harvest timing and harvesting methods, beet cleaning and transport to sugar plants.
RAW MATERIALS

Average beet area and number of beet growers

- Average beet area in ha
  - Poland
  - SZP

- Number of beet growers, 02/03 = 100%
  - Poland
  - SZP
RAW MATERIALS
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>2003</td>
<td>70.5</td>
<td>100%</td>
</tr>
<tr>
<td>2014</td>
<td>66.5</td>
<td>100%</td>
</tr>
<tr>
<td>2015</td>
<td>70.5</td>
<td>100%</td>
</tr>
<tr>
<td>2016</td>
<td>70.5</td>
<td>100%</td>
</tr>
<tr>
<td>2017</td>
<td>70.5</td>
<td>100%</td>
</tr>
<tr>
<td>2018</td>
<td>70.5</td>
<td>100%</td>
</tr>
<tr>
<td>2019</td>
<td>70.5</td>
<td>100%</td>
</tr>
<tr>
<td>2020</td>
<td>70.5</td>
<td>100%</td>
</tr>
</tbody>
</table>

Legend:
- **Green Bar**: Average beet yield in t/ha
- **Green Line**: Biological sugar yield, 02/03 = 100%
- **Yellow Bar**: Average beet yield in t/ha
- **Yellow Line**: Biological sugar yield, 02/03 = 100%
**PRODUCTION**

**Important production indicators (2001/02 campaign = 100%)**

- Number of sugar plants
- Processing capacity (t/d)
- Campaign duration (d)
- Sugar production/plant (t)

<table>
<thead>
<tr>
<th>Campaign</th>
<th>Number of sugar plants</th>
<th>Processing capacity (t/d)</th>
<th>Campaign duration (d)</th>
<th>Sugar production/plant (t)</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/07</td>
<td>100</td>
<td>250</td>
<td>150</td>
<td>150</td>
</tr>
<tr>
<td>11/12</td>
<td>150</td>
<td>250</td>
<td>150</td>
<td>150</td>
</tr>
<tr>
<td>16/17</td>
<td>200</td>
<td>300</td>
<td>200</td>
<td>200</td>
</tr>
</tbody>
</table>

Legend:
- Red: Number of sugar plants
- Gray: Processing capacity (t/d)
- Light Blue: Campaign duration (d)
- Blue: Sugar production/plant (t)
Polish Sugar Market
SUGAR INDUSTRY

Overview

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

Basic information
- About 38.2 m consumers
- Annual sugar consumption: ca. 38.5 kg per capita
- Sugar quota: 1.4 m t until September 2017 (10.4% of sugar quota in EU_28)
- Poland is the third largest sugar producer in EU_28 after France and Germany
- 18 production plants
### CAMPAIGN RESULTS

<table>
<thead>
<tr>
<th></th>
<th>Unit</th>
<th>00/01</th>
<th>04/05</th>
<th>08/09</th>
<th>12/13</th>
<th>15/16</th>
<th>16/17</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beet area</strong></td>
<td>1,000 ha</td>
<td>311</td>
<td>297</td>
<td>177</td>
<td>193</td>
<td>171*</td>
<td>203</td>
</tr>
<tr>
<td><strong>Number of beet growers</strong></td>
<td>1,000</td>
<td>112</td>
<td>78</td>
<td>41</td>
<td>36</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td><strong>Average plantation area</strong></td>
<td>ha</td>
<td>2.8</td>
<td>3.8</td>
<td>4.3</td>
<td>5.4</td>
<td>5.0</td>
<td>6.0</td>
</tr>
<tr>
<td><strong>Beet yield</strong></td>
<td>t/ha</td>
<td>42.4</td>
<td>42.5</td>
<td>48.0</td>
<td>63.7</td>
<td>54.6</td>
<td>66.5</td>
</tr>
<tr>
<td><strong>Actual sugar yield</strong></td>
<td>t/ha</td>
<td>6.5</td>
<td>6.8</td>
<td>7.2</td>
<td>9.6</td>
<td>7.6</td>
<td>10.3</td>
</tr>
</tbody>
</table>

|                        |           |       |       |       |       |       |       |
| **Number of active sugar plants** |         | 76    | 43    | 19    | 18    | 18    | 18    |
| **Average daily beet processing** | 1,000 t/d | 176.0 | 160.7 | 102.2 | 104.6 | 116.3 | 121.1 |
| **Per sugar plant**     | t/d       | 2,270 | 4,330 | 5,175 | 5,810 | 6,460 | 6,730 |
| **Campaign duration**   | d         | 61    | 78    | 86    | 118   | 80    | 112   |
| **Sugar production**    | 1,000 t   | 2,013 | 2,002 | 1,275 | 1,864 | 1,294 | 2,084 |

* In 2015, there was a long drought; the sown area was ca. 200,000 ha.
The campaign is designed to restore equilibrium in the public debate
- Reaction to a variety of advertisements against products with sugar
- Increasing public awareness of the role of sugar in human diet
- Clarification of the most popular myths related to sugar consumption
- Pro-sugar advertising and professional press conferences
- Campaign support by famous food experts and dietitians

2017 campaign: How to use sugar, www.uczymyjakslodzic.pl
## 2016/17 Campaign

<table>
<thead>
<tr>
<th></th>
<th>2015/16</th>
<th>2016/17*</th>
<th>Δ w %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultivation area</td>
<td>1.31 m ha</td>
<td>1.41 m ha</td>
<td>-8%</td>
</tr>
<tr>
<td>Number of growers</td>
<td>137,000</td>
<td>136,000</td>
<td>-1%</td>
</tr>
<tr>
<td>Beet yield</td>
<td>67.9 t/ha</td>
<td>75.0 t/ha</td>
<td>10%</td>
</tr>
<tr>
<td>Beet amount</td>
<td>89 m t</td>
<td>106 m t</td>
<td>19%</td>
</tr>
<tr>
<td>Technical sugar yield</td>
<td>10.9 t/ha</td>
<td>11.9 t/ha</td>
<td>9%</td>
</tr>
<tr>
<td>Number of active sugar plants</td>
<td>109</td>
<td>108¹</td>
<td>-1%</td>
</tr>
<tr>
<td>Daily processing capacity</td>
<td>0.93 m t/d</td>
<td>1.04 m t/d</td>
<td>12%</td>
</tr>
<tr>
<td>Sugar production</td>
<td>14.9 m t</td>
<td>16.8 m t</td>
<td>13%</td>
</tr>
<tr>
<td>Sugar carried forward from previous campaign</td>
<td>2.66 m t</td>
<td>0.93 m t</td>
<td>-65%</td>
</tr>
<tr>
<td>Sugar production under quota</td>
<td>13.53 m t</td>
<td>13.53 m t</td>
<td>0%</td>
</tr>
</tbody>
</table>

* Initial data
¹ In Greece
# BEET CULTIVATION

<table>
<thead>
<tr>
<th>Quota share</th>
<th>Area in 1,000 ha</th>
<th>Technical sugar yield in t/ha</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 biggest producers</td>
<td>FR, DE, PL, GB, NL, BE</td>
<td>1,157</td>
</tr>
<tr>
<td>Share and difference to average yield</td>
<td>74.3%</td>
<td>75.2%</td>
</tr>
<tr>
<td>6 medium producers</td>
<td>IT, ES, CZ, DK, AT, SE</td>
<td>271</td>
</tr>
<tr>
<td>Share and difference to average yield</td>
<td>17.4%</td>
<td>16.7%</td>
</tr>
<tr>
<td>7 smallest producers</td>
<td>HR, GR, SK, HU, RO, LT, FI</td>
<td>129</td>
</tr>
<tr>
<td>Share and difference to average yield</td>
<td>8.3%</td>
<td>8.1%</td>
</tr>
<tr>
<td><strong>EU</strong>&lt;sub&gt;28&lt;/sub&gt; *</td>
<td>1,557</td>
<td>1,337</td>
</tr>
</tbody>
</table>

* Excluding FR (DOM = département d’outre-mer) and PT (the Azores)
### SUGAR PRODUCTION

<table>
<thead>
<tr>
<th></th>
<th>Sugar production in m t</th>
<th>Sugar quota in 1,000 t</th>
<th>Sugar carried forward from 2015/16 in 1,000 t</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2014/15</td>
<td>2015/16</td>
<td>2016/17</td>
</tr>
<tr>
<td><strong>6 biggest producers</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FR</td>
<td>4.58</td>
<td>4.01</td>
<td>4.24</td>
</tr>
<tr>
<td>DE</td>
<td>4.49</td>
<td>2.95</td>
<td>3.57</td>
</tr>
<tr>
<td>PL</td>
<td>1.98</td>
<td>1.42</td>
<td>1.96</td>
</tr>
<tr>
<td>GB</td>
<td>1.09</td>
<td>0.98</td>
<td>0.92</td>
</tr>
<tr>
<td>NL</td>
<td>1.45</td>
<td>0.77</td>
<td>0.87</td>
</tr>
<tr>
<td>BE</td>
<td>0.85</td>
<td>0.75</td>
<td>0.73</td>
</tr>
<tr>
<td>Share</td>
<td>70.0%</td>
<td>72.9%</td>
<td>72.9%</td>
</tr>
<tr>
<td><strong>6 medium producers</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT, ES, CZ, DK, AT, SE</td>
<td>3.15</td>
<td>2.47</td>
<td>2.73</td>
</tr>
<tr>
<td>Share</td>
<td>16.1%</td>
<td>16.5%</td>
<td>16.2%</td>
</tr>
<tr>
<td><strong>9 smallest producers</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Share</td>
<td>1.93</td>
<td>1.59</td>
<td>1.83</td>
</tr>
<tr>
<td><strong>EU28</strong></td>
<td>19.51</td>
<td>14.94</td>
<td>16.84</td>
</tr>
</tbody>
</table>

* Quota share in EU28  ** Including FR (DOM = département d’outre-mer) and PT (the Azores)
SUGAR PRICES
Average monthly price in EUR/t

White sugar, ex-works in the EU (excl. VAT and delivery)
Industrial white sugar, ex-works in the EU
Reference price
EU SUGAR MARKET POLICY
Market Framework to/from 10/2017

Sugar market policy until 30th 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 1.35 m t/year

New market framework from 1st 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
<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total EU28 quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>France*</td>
<td>25.4</td>
</tr>
<tr>
<td>Germany</td>
<td>21.4</td>
</tr>
<tr>
<td>Poland</td>
<td>10.4</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>7.8</td>
</tr>
<tr>
<td>Netherlands</td>
<td>6.0</td>
</tr>
<tr>
<td>Belgium</td>
<td>5.0</td>
</tr>
<tr>
<td>Italy</td>
<td>3.8</td>
</tr>
<tr>
<td>Spain</td>
<td>3.7</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>2.8</td>
</tr>
<tr>
<td>Denmark</td>
<td>2.8</td>
</tr>
<tr>
<td>Austria</td>
<td>2.7</td>
</tr>
<tr>
<td>Sweden</td>
<td>2.2</td>
</tr>
<tr>
<td>Croatia</td>
<td>1.4</td>
</tr>
<tr>
<td>Greece</td>
<td>1.2</td>
</tr>
<tr>
<td>Slovakia</td>
<td>0.8</td>
</tr>
<tr>
<td>Romania</td>
<td>0.8</td>
</tr>
<tr>
<td>Hungary</td>
<td>0.8</td>
</tr>
<tr>
<td>Lithuania</td>
<td>0.7</td>
</tr>
<tr>
<td>Finland</td>
<td>0.6</td>
</tr>
<tr>
<td>Portugal**</td>
<td>0.1</td>
</tr>
</tbody>
</table>

*Including DOM (départements d’outre-mer)  **Including the Azores
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