



FRUIT STARCH SUGAR

The natural upgrade

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ABOUT US

AGRANA FACTS

- We refine agricultural raw materials, turning them into a range of different industrial products to supply local producers as well as large multinational companies active in the food processing industry, in particular
- We also serve the end-consumer market in the Sugar segment with country-specific brands such as „Wiener Zucker“ in Austria



8,730
employees



58
production
sites



2.6 €bn
revenue



World market leader in the
production of

FRUIT

SUPPLIER PREPARATIONS



Major manufacturer
of customer-specific

STARCH

PRODUCTS



Leading

SUGAR

SUPPLIER

In Central, Eastern & South-
Eastern Europe



STRATEGIC POSITIONING B2B

WE ALL CONSUME AGRANA (PRODUCTS)

At the beginning there is always agriculture...



AGRANA refines agricultural raw materials...



AGRANA supplies the Big Names...



confectionery, beverage, fermentation industries, food retailers; paper, textile, pharmaceutical industries; feed industry; dairy, ice-cream, bakery industries and many more



We all consume AGRANA every day...





AGRANA-PRODUCTS IN DAILY LIFE *AT A GLANCE*

SUGAR



- for consumers:
„Wiener Zucker“ (20%)
- for food producers:
e.g. for pastries, confectionery, dairy products, preserves, drinks etc. (80%)

STARCH



- as food ingredients, e.g. for sauces, potato products etc.
- as child and infant food
- for cosmetic products
- for technical applications, e.g. for paper finishing
- as animal feeds
- for bioethanol

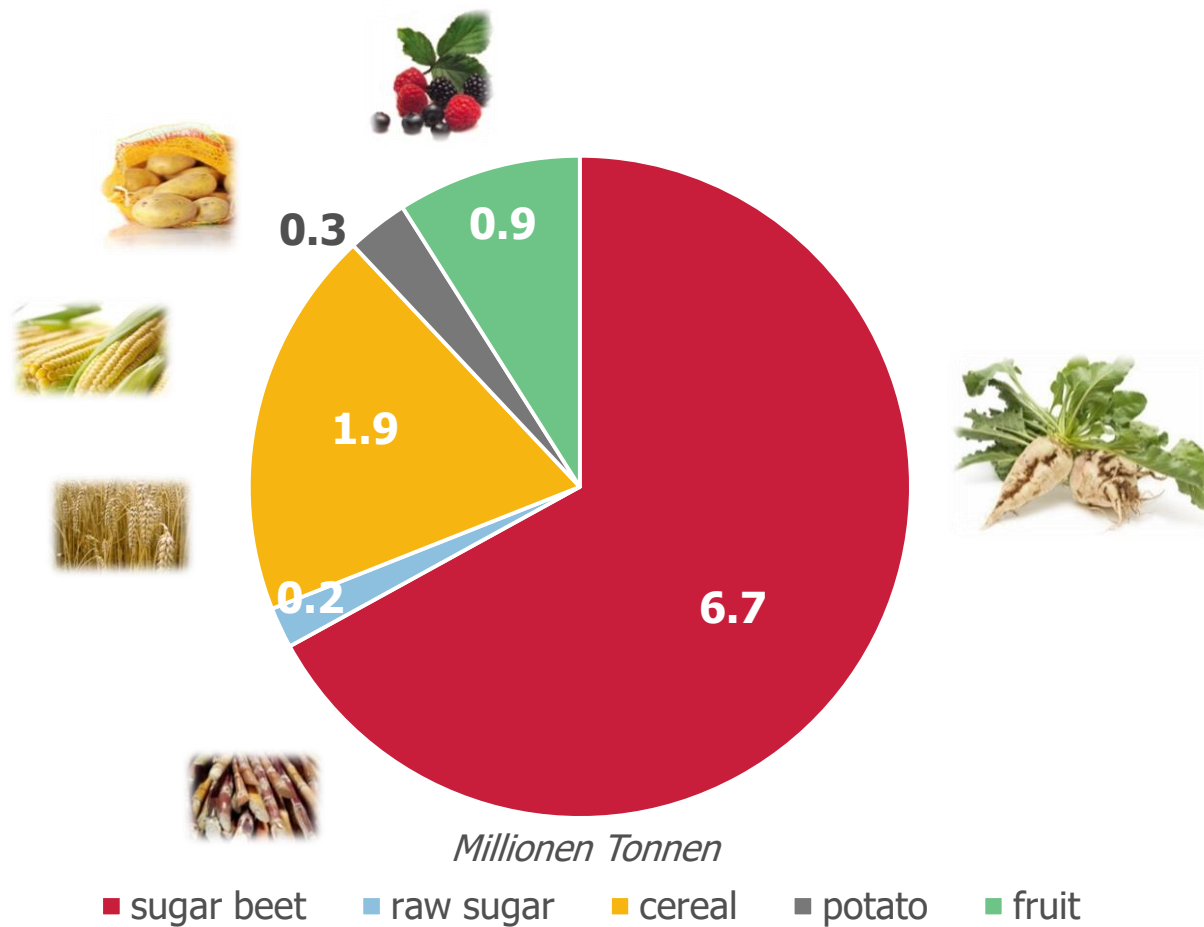
FRUIT



- fruit preparations in dairy products, ice-cream, in baked goods or as fruit decoration
- fruit juice concentrates in soft drinks and alcoholic beverages



10 MILLION TONS OF RAW MATERIALS



incl. 50% of Joint Ventures HUNGRANA und STUDEN



INTERNATIONAL PRODUCTION MEETS INT. CUSTOMERS

PRODUCTION SITES WORLDWIDE

FRUIT

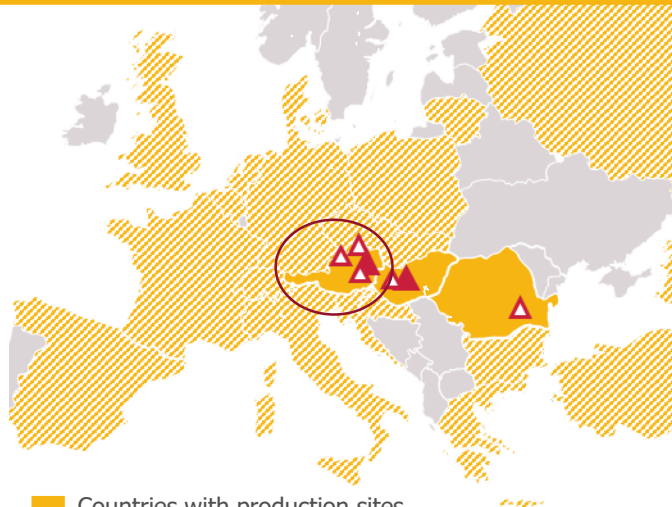
28 fruit preparation plants and
15 fruit concentrate plants



- Countries with production sites
- Potential Growth Regions

STARCH

5 starch plants
(incl. 2 bioethanol plants)



- Countries with production sites
- ▨ Main markets
- ▲ Starch plants
- ▲ Bioethanol plants

SUGAR

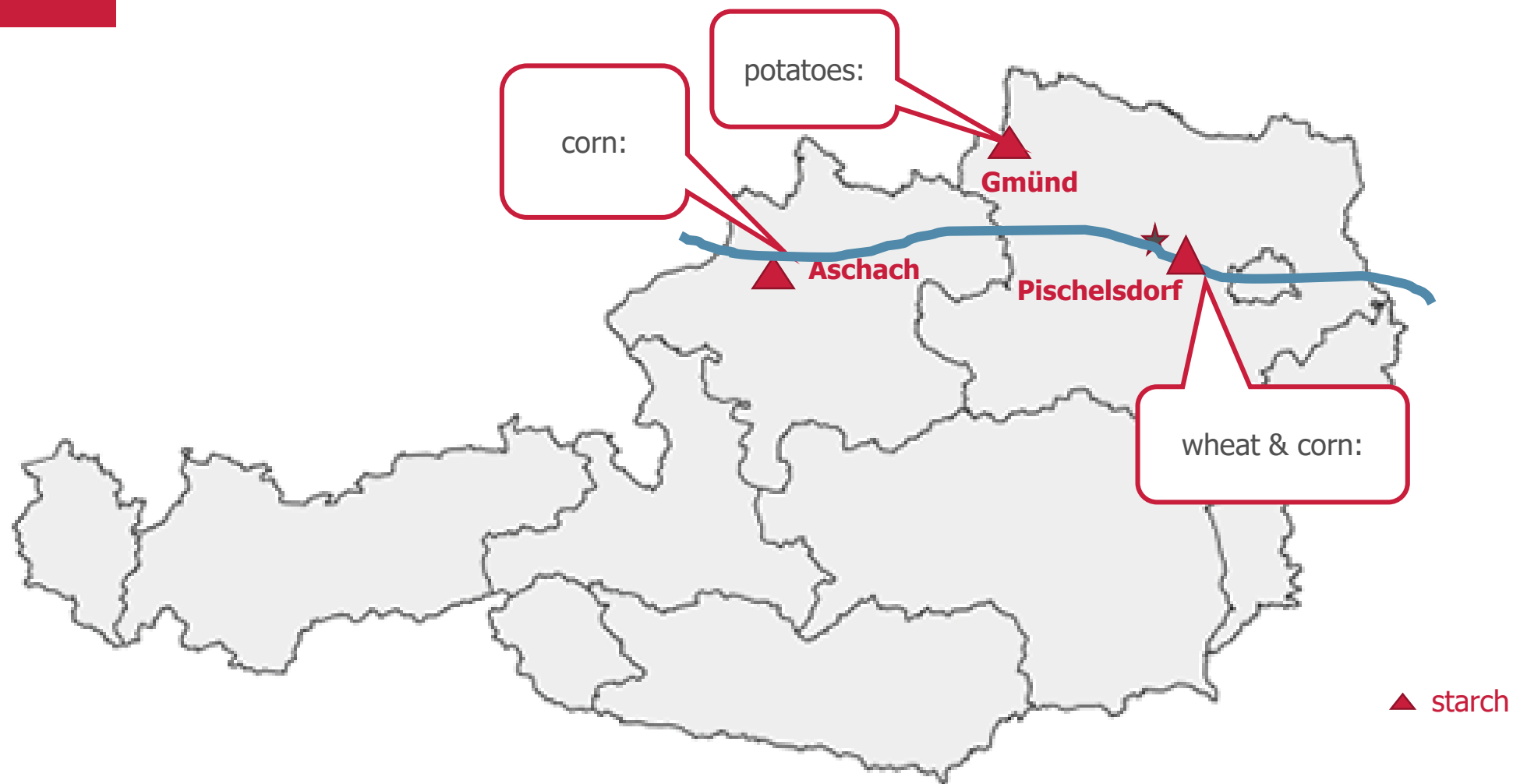
7 sugar beet plants
2 raw sugar refineries &
1 Instantina plant



- Countries with plants
- ▨ Other markets
- Beet sugar plants
- Raw sugar refinery
- Distribution centre
- * Also with refining activities



STARCH: AGRANA SITES IN AUSTRIA





AGRANA PISCHELSDORF

BIOREFINERY PISCHELSDORF

INVESTMENTS

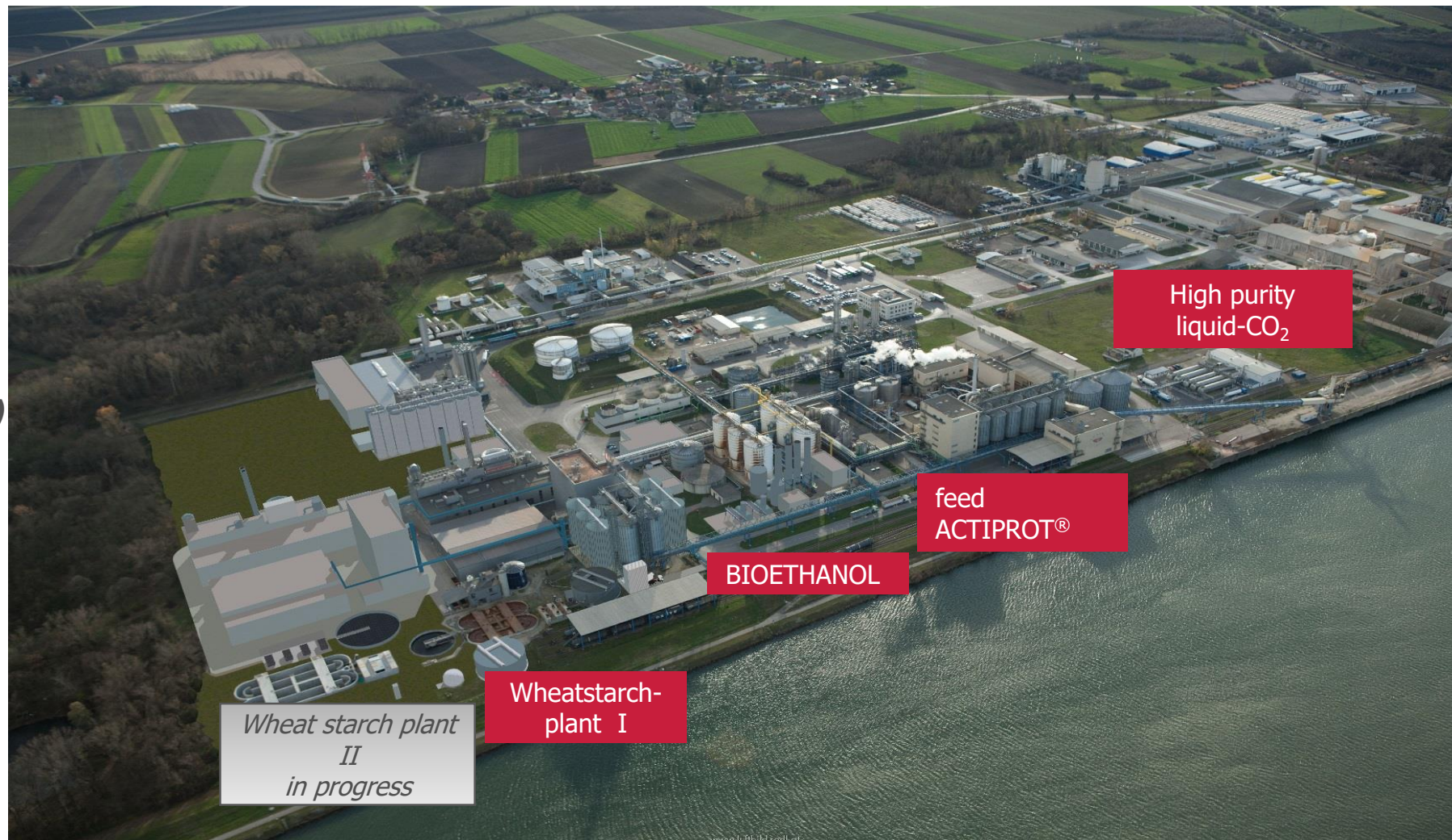
Bioethanol plant (2007)

Wheat starch plant I (2013)

Wheat starch plant II (2020)

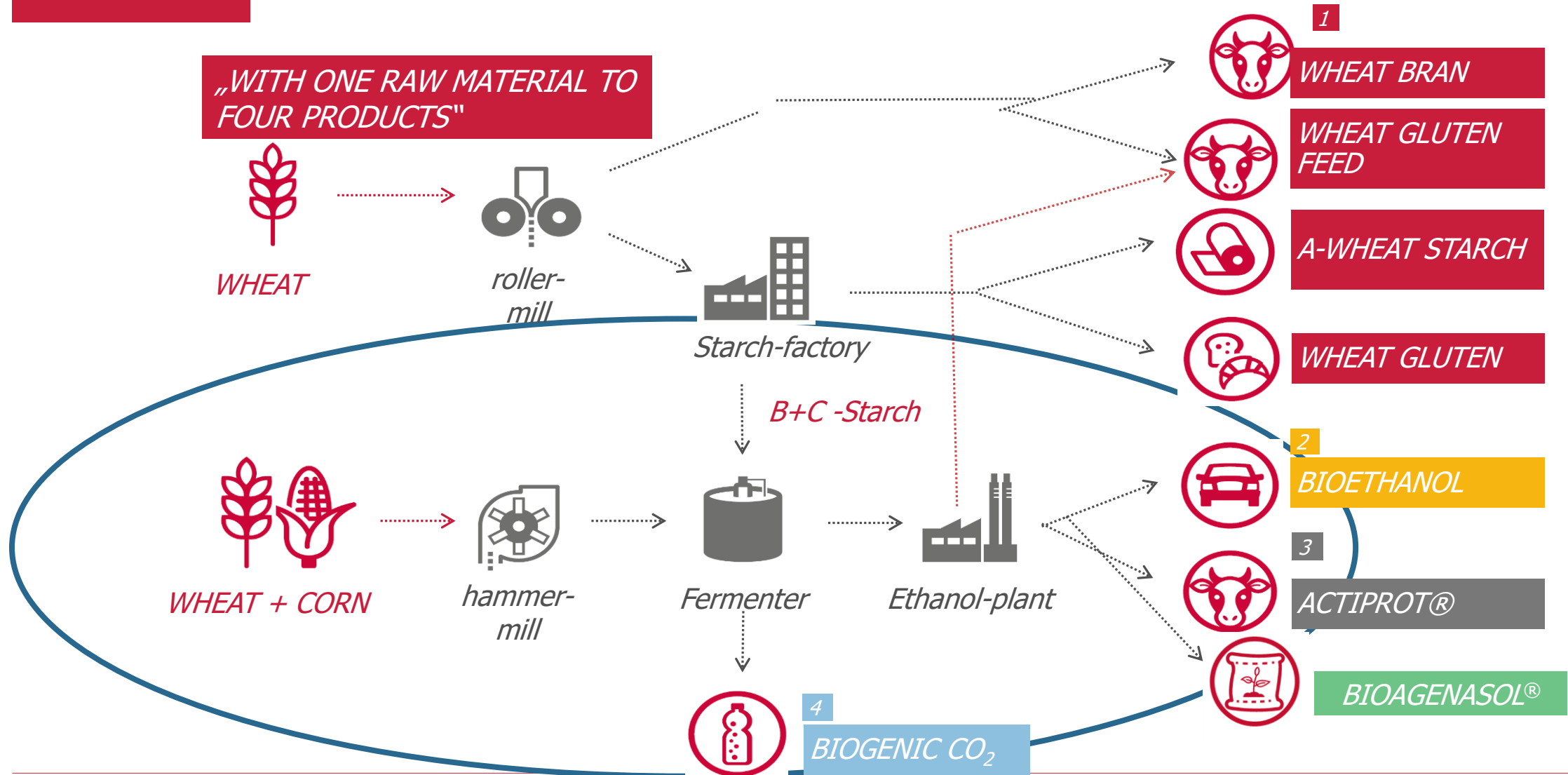
WORKINGPLACES

DIRECTLY EMPLOYED:
195 EMPLOYEES





100% UTILISATION OF RAW MATERIALS





AGRANA PISCHELSDORF WHY PISCHELSDORF

positive facts for the site:

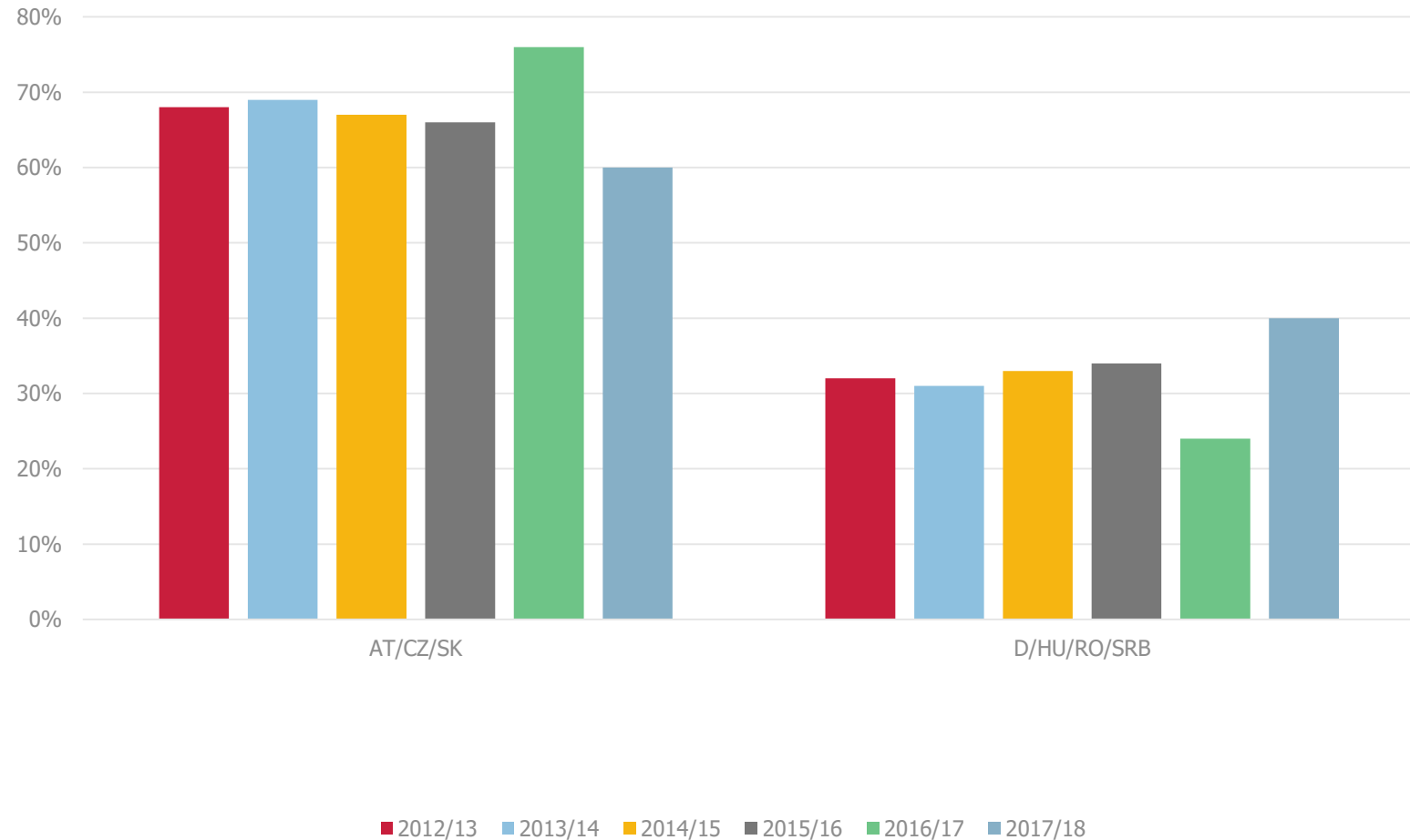
- **Good availability** of regional **raw materials**
- **Infrastructure**
 - danube
 - rail way connection
 - business-park
- **Steam** from a **waste treatment plant** (3km)





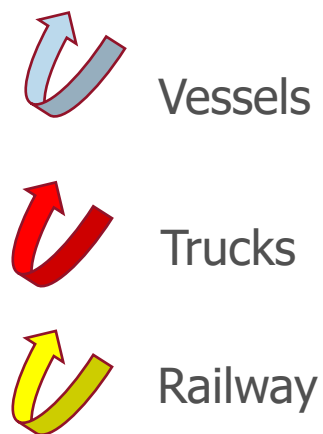
COUNTRIES OF ORIGIN RAW MATERIAL

- Weather conditions
- Crop yields
- Availability of biomass
- Worldmarkets / prices for cereals
- Capacity of transporting





LOGISTICS TO THE PLANT PISCHELSDORF





AGRANA PISCHELSDORF
LOGISTICS



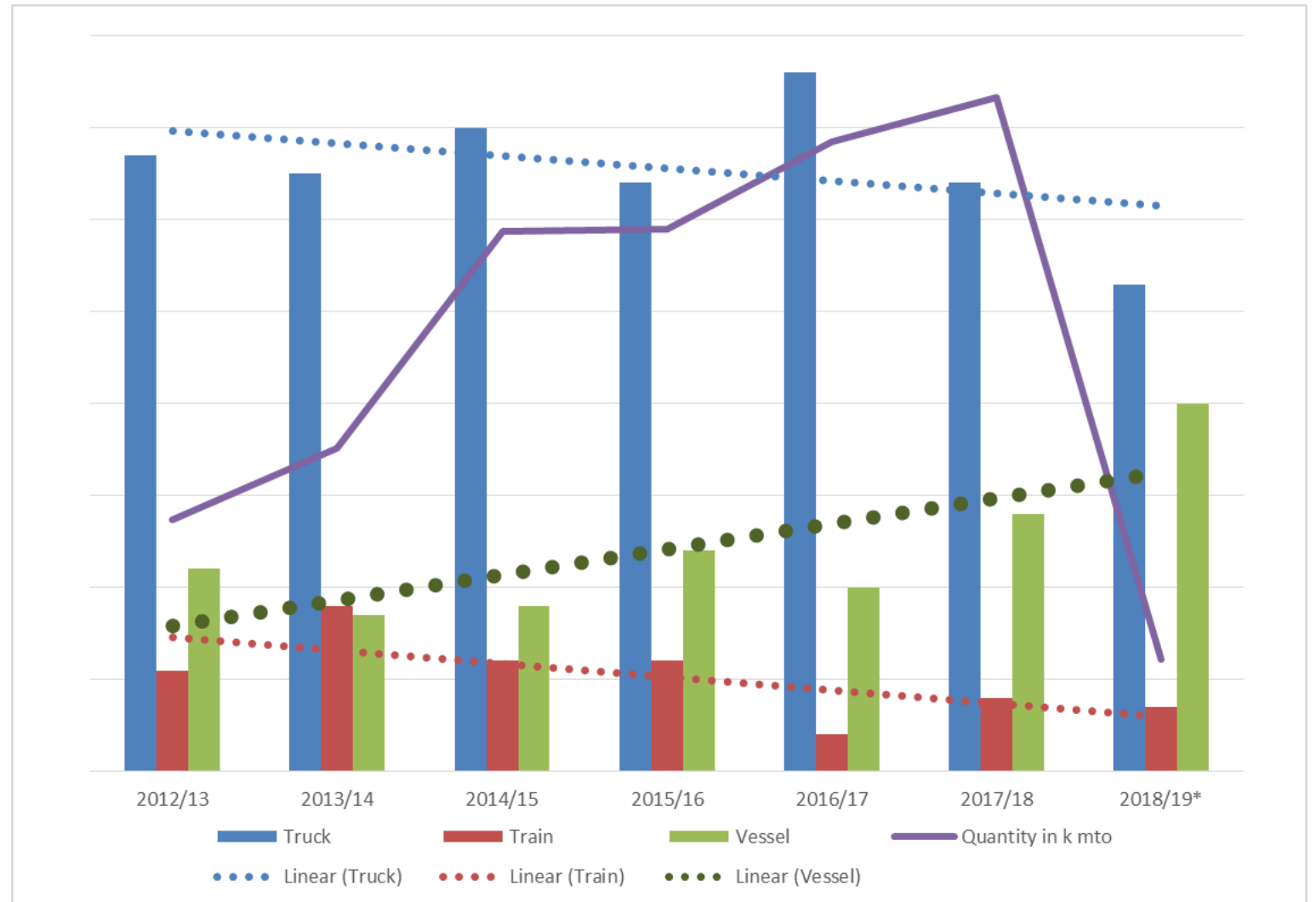
Trucks/Train/Vessel
Co-products &
Raw-material



Truck/Train
Bioethanol

Discharging capacity
up to 280/300 to/h

Loading rate
150 to/h





REQUIREMENTS FOR SUPPLYING AND TRANSPORTING

**Bulk products – Cereals and co-products:
we are also producing animal feed as a co-product of
the bioethanol production:**

A lot of inspections are done by authorities, clients and different certification schemes (vessels / silos / warehouses / truck / railway):

- to guarantee product safety in terms of:
cleanness and dryness, no living bugs, vermin or rattles etc.
- using grids to sieve biomass in case of loading truck cargos into vessels
- to have a certain loading rate (good performance of loading quantity per day)
- Transparency (first come – first serve) in terms of loadings





REQUIREMENTS FOR SUPPLYING AND TRANSPORTING

- The port is able to load truck cargos quick and efficient (adequate weighing bridges, loading ramps, grids...)
- **Vessel/barge**
wooden floors are not adequate – discharging problems and problem of cleanness and dryness
watertightness (rain – mold)
for discharging: the less partitions in a vessel so much the better

Vessel/ship/barge/truck/train

- **Co-products (DDGS – animal feed)**
GMP or an adequate certification is needed





OUTLOOK FOR THE BIOENERGY AND BIOMASS SECTOR

- To fulfil environmental targets (under the Kyoto Protocol)!
- There are existing Bioethanol plants alongside the Danube (AT, HU) – new plants? Biorefinery (Wheat starch plant II – expansion in Pischelsdorf)
- Always a matter of profit or loss (plants are shut down and restarted – markets (Biomass and Bioenergy) are working independent in Europe)
- New Biofuel Directive is in the pipeline (conventional and advanced biofuels – depending on the used biomass) → where will we go in future (frame conditions, NGOs, stakeholders, politics...)
- Don't forget the availability of the biomass and the profit of new projects at the end of the day



EINDRINGLICHE WARNUNG

Letzte Chance für Weltklima

Die nächsten Jahre sind die letzte Chance, in Sachen Klimawandel drohende katastrophale Entwicklungen zu verhindern. Zu diesem Schluss kommt der Sonderbericht des UNO-Weltklimarates (IPCC). Macht die Politik weltweit nicht dramatische Schritte, drohe etwa das Aus für Korallen und viel mehr Naturkatastrophen als schon jetzt.





SEGMENT

STARCH

THANKS FOR LISTENING!



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