



# FRUIT STARCH SUGAR

The natural upgrade

Walter Schragen  
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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

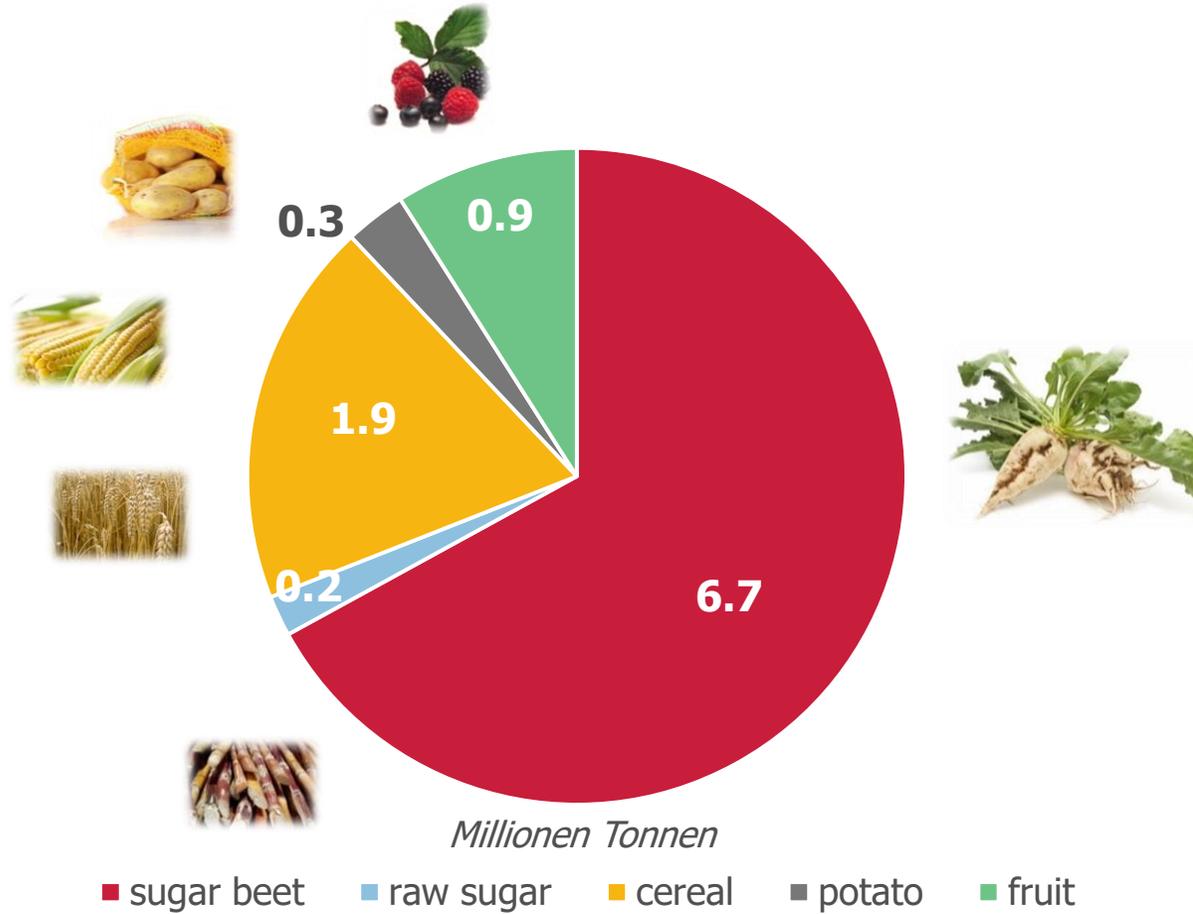
### FRUIT



- 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

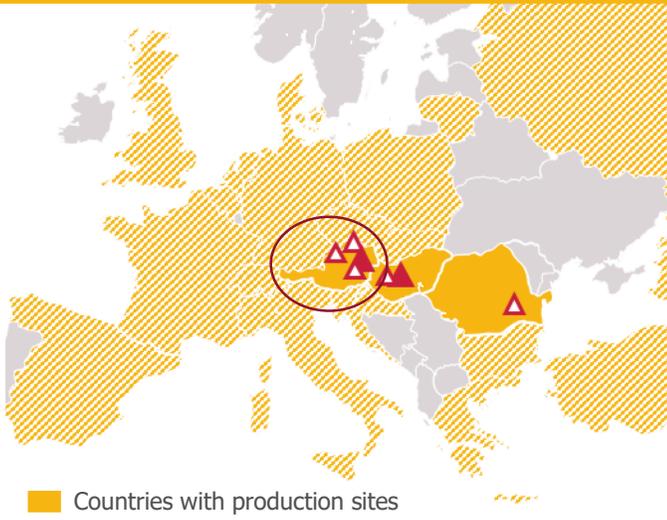
28 fruit preparation plants and  
15 fruit concentrate plants



- 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

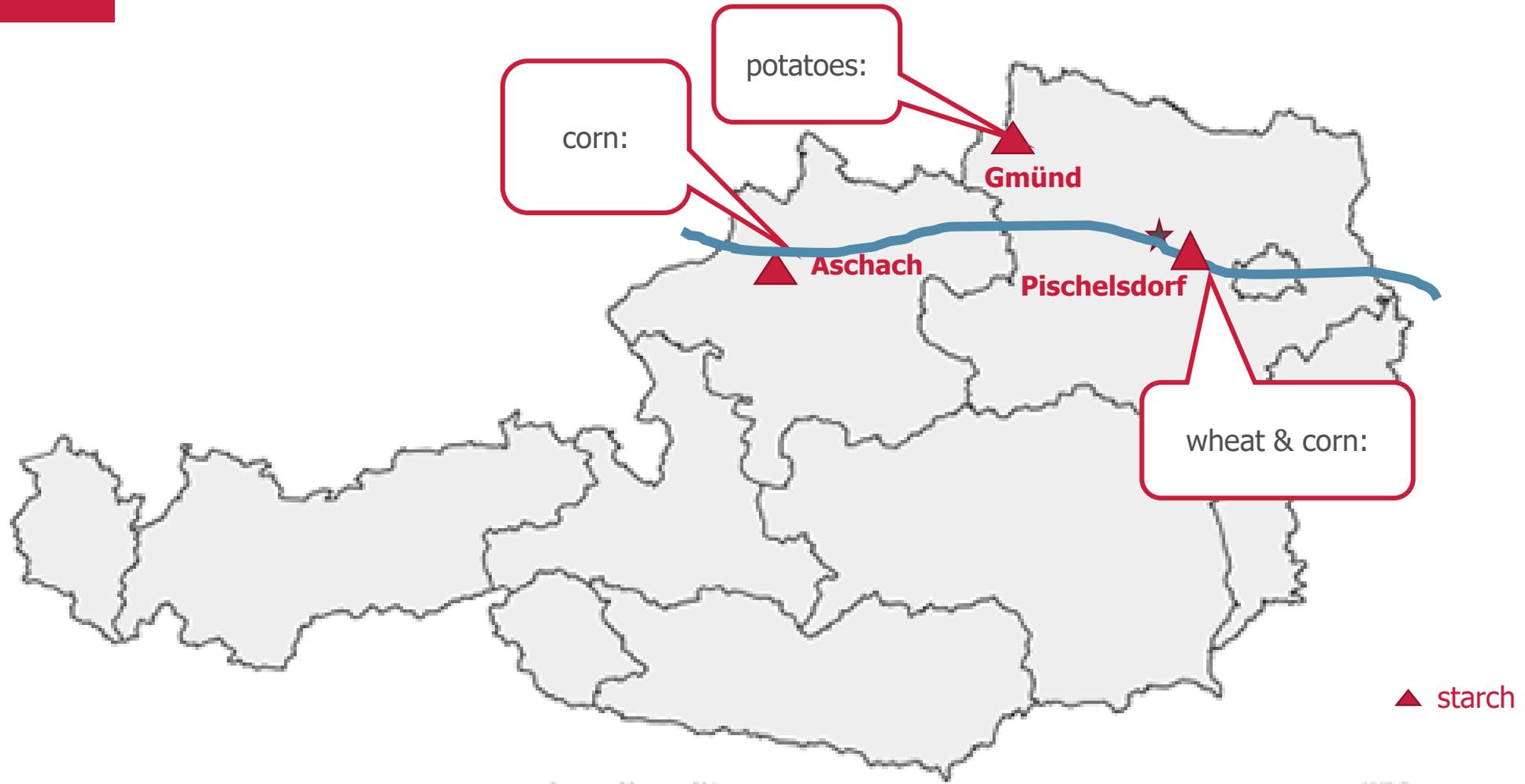
7 sugar beet plants  
2 raw sugar refineries &  
1 Instantina plant



- 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

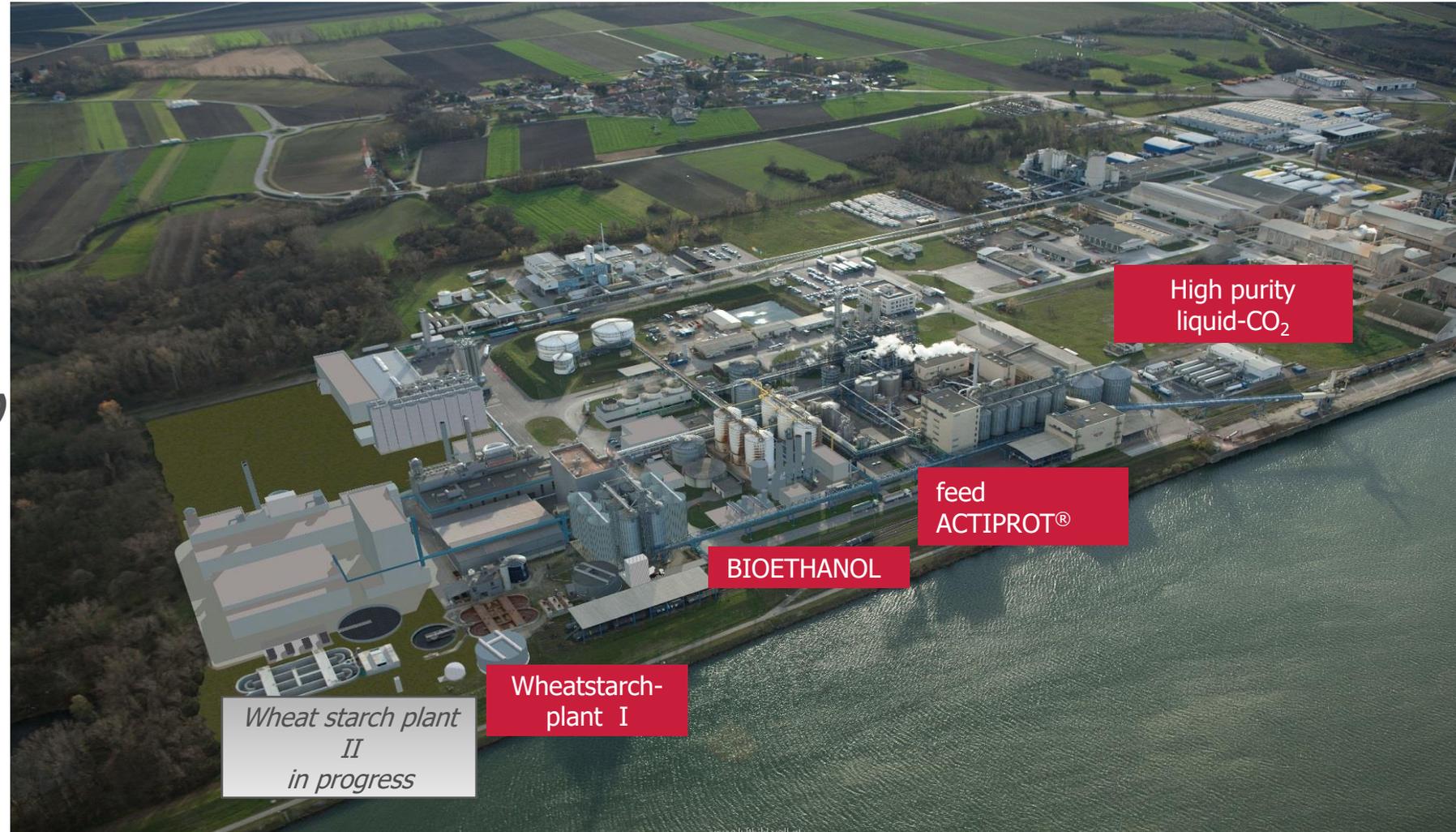
Bioethanol plant (2007)

Wheat starch plant I (2013)

*Wheat starch plant II (2020)*

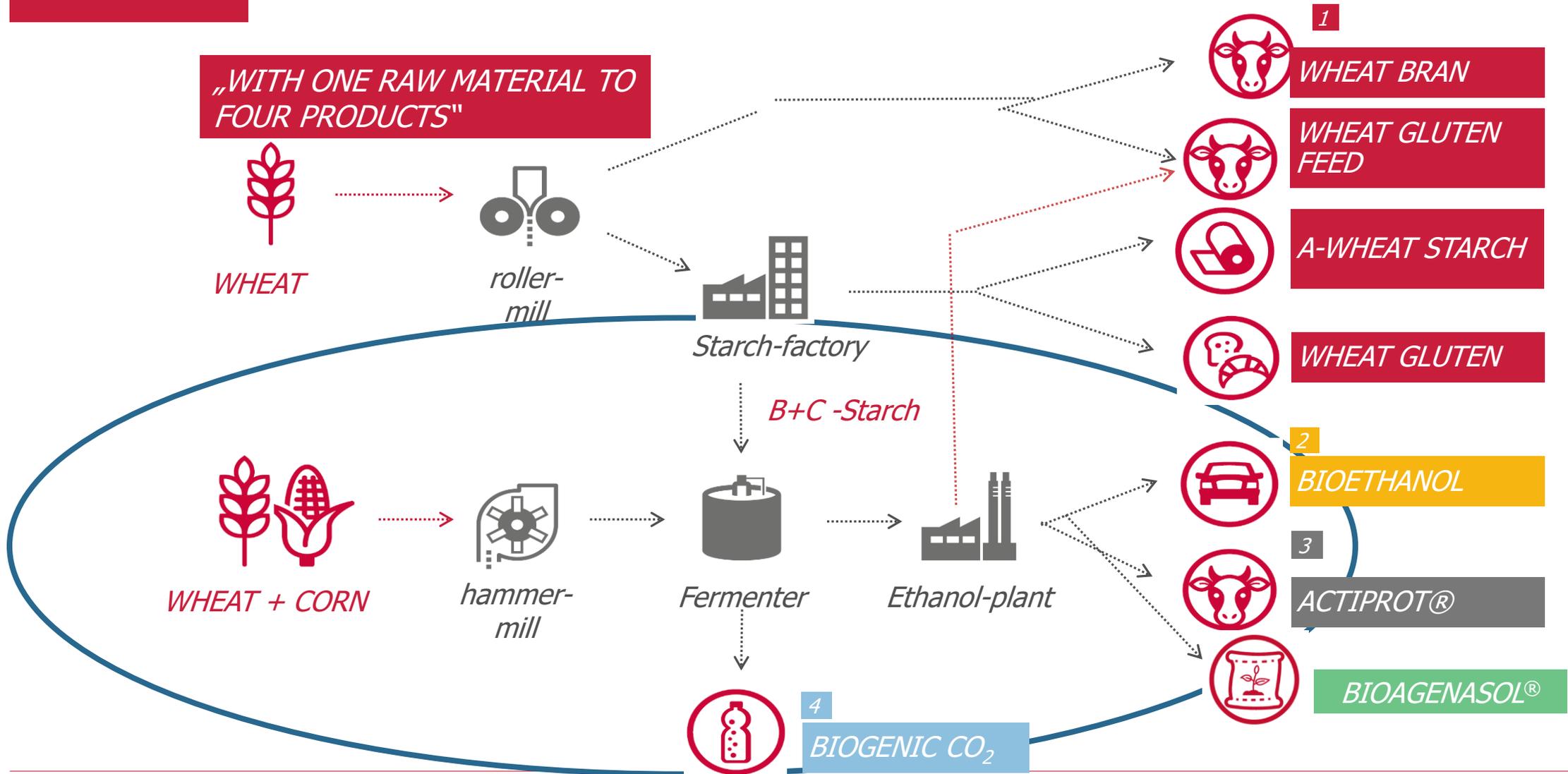
## WORKINGPLACES

**DIRECTLY EMPLOYED:**  
195 EMPLOYEES





# 100% UTILISATION OF RAW MATERIALS





*AGRANA PISCHELSDORF*  
**WHY PISCHELSDORF**

**positive facts for the site:**

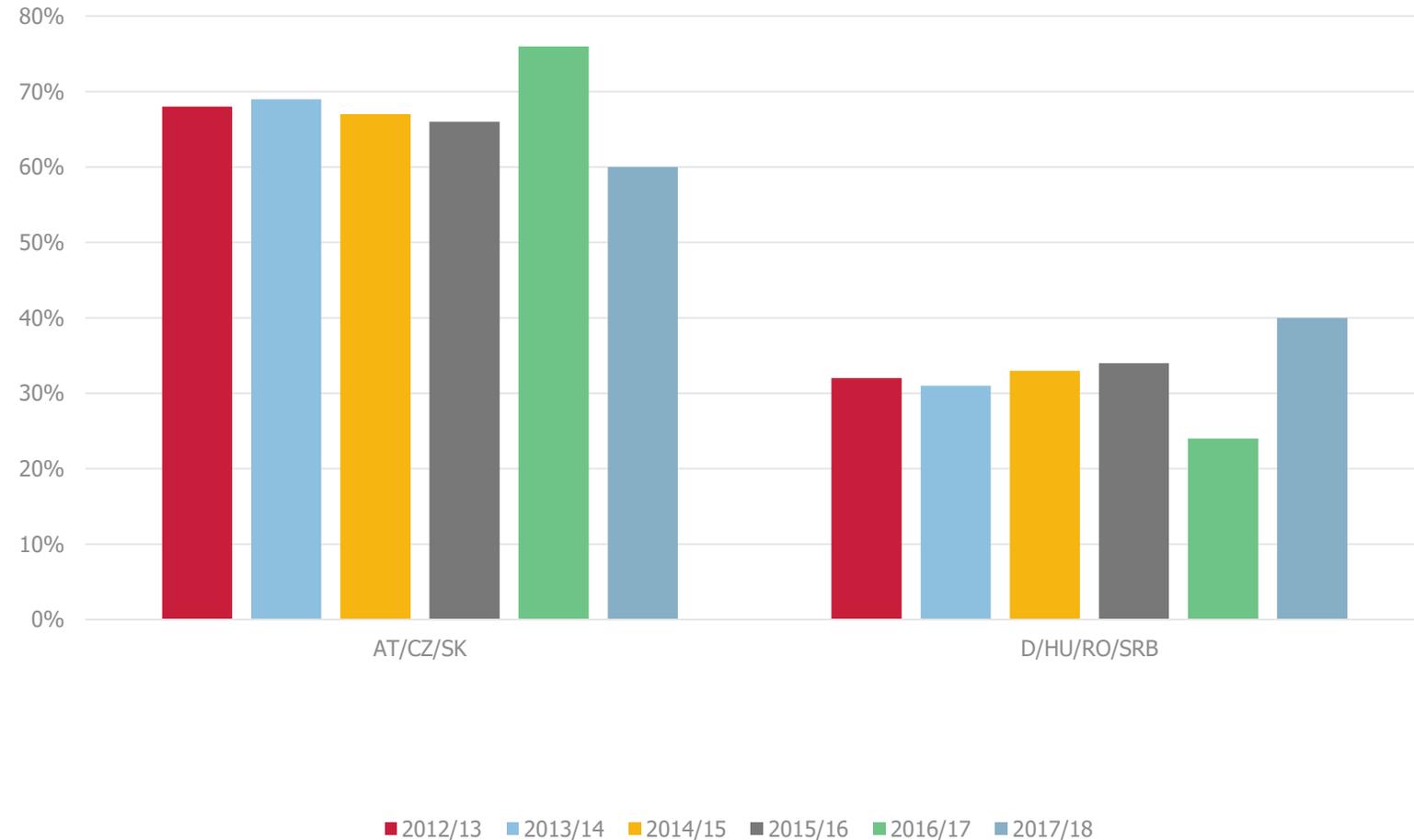
- **Good availability** of regional **raw materials**
- **Infrastructure**
  - danube
  - rail way connection
  - business-park
- **Steam** from a **waste treatment plant** (3km)





# COUNTRIES OF ORIGIN RAW MATERIAL

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





# LOGISTICS TO THE PLANT PISCHELSDORF

-  Vessels
-  Trucks
-  Railway





AGRANA PISCHELSDORF

# LOGISTICS



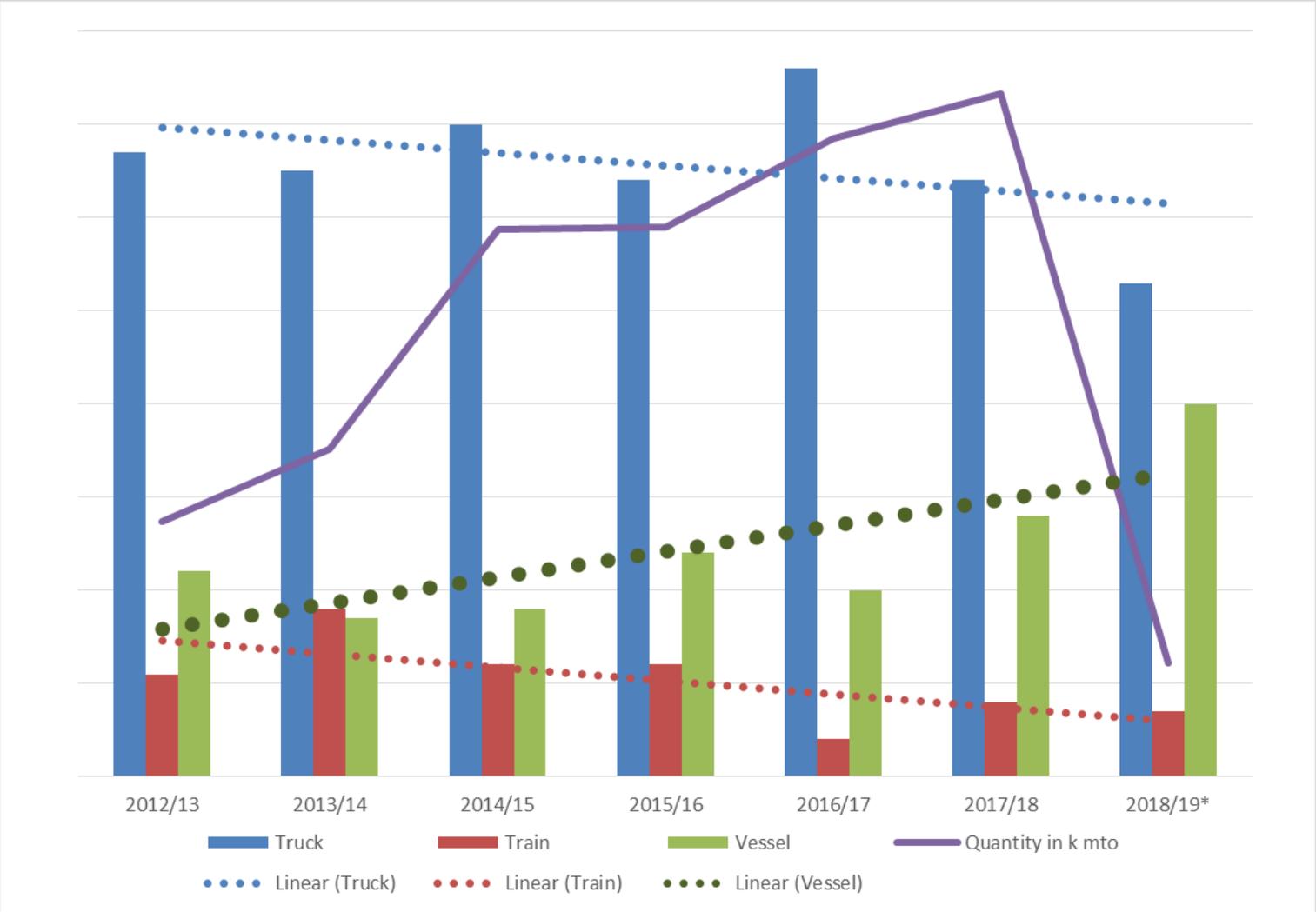
Trucks/Train/Vessel  
Co-products & Raw-material



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



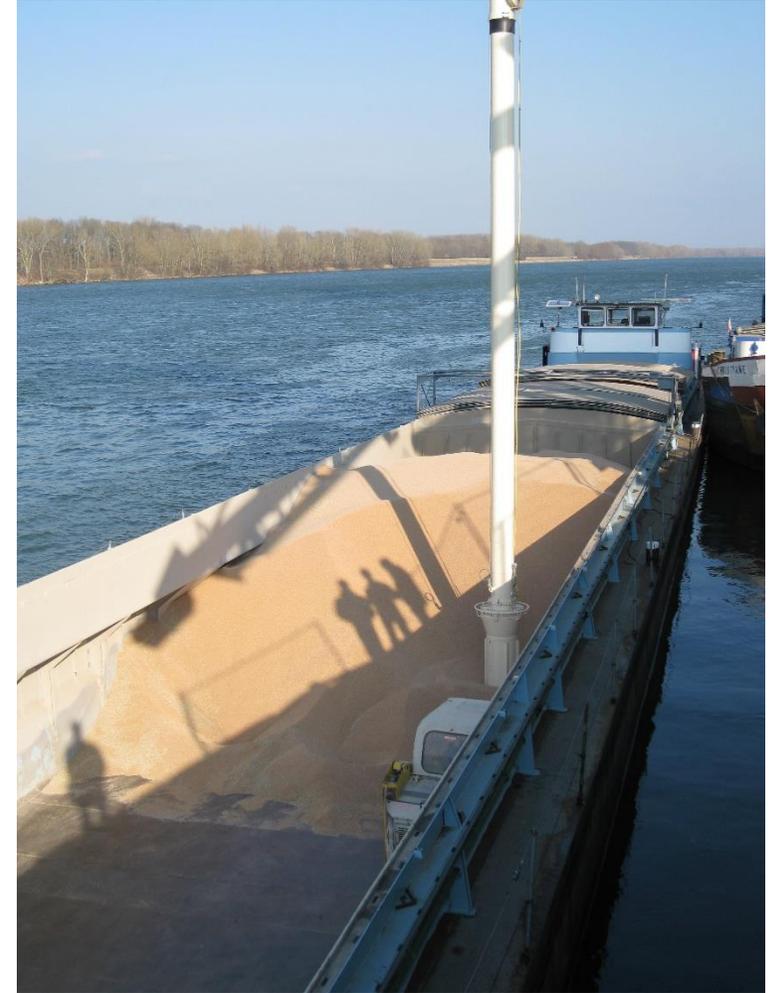


# REQUIREMENTS FOR SUPPLYING AND TRANSPORTING

- 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 transport 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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