

ZUCK



FACTS AND FIGURES 2013

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FROM BEET TO SUGAR

FACTS AND FIGURES 2013



AGRANA is an internationally active, Austrian-based industrial player which adds value to agricultural commodities to produce a wide range of products for the processing industry. With around 8,500 employees at 56 production sites on five continents, AGRANA maintains a truly global presence. Having been founded as a holding company for the Austrian sugar and starch industry in 1988, AGRANA has successfully developed over the past 25 years from a solely Austrian to a globally active company.

AGRANA products are an intrinsic part of everyday life. The product range extends from sugar in foodstuffs and starch in textiles and paper to bioethanol as an admixture to petrol as well as apple juice concentrate and the fruit in yoghurts.

In the sugar segment, its traditional core business, the Group is active in Austria, the Czech Republic, Hungary, Slovakia, Romania and Bosnia-Herzegovina. AGRANA also markets sugar and starch products in Bulgaria. Through its country-specific sugar brands, such as "Wiener Zucker" in Austria and "Koronás Cukor" in Hungary, AGRANA offers customers a wide range of sugar and speciality sugar products. This product range is particularly popular among consumers due to the consistently high quality levels and the attractive packaging designs.

In the starch segment, AGRANA is represented by production facilities in Austria, Hungary and Romania. The corn and potato starch factories manufacture customer-oriented specialised products for the processing industry. In the food sector, AGRANA's starch products are found in confectionery, bakery products and baby food, for example. Additionally, AGRANA has established itself as an international specialist for organic starch products.

The Group is also active in the commercial area of renewable energy through the production of bioethanol. This bioethanol is produced in Pischelsdorf, Lower Austria, from starch-rich cereal varieties and corn and ultimately used





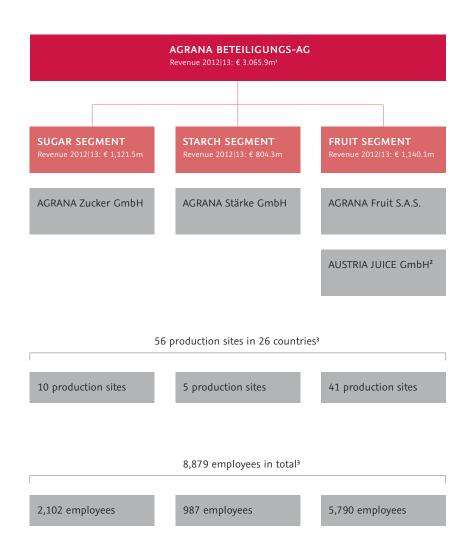


as an admixture to petrol or as the fuel grade SuperEthanol E85. Using a litre of bioethanol saves around 70% in terms of greenhouse gas emissions compared to a litre of petrol.

The fruit segment, focussing on fruit preparations and fruit juice concentrates, plays a major role in the Group's international presence as a result of its numerous facilities worldwide.

Various fruits are carefully processed for use in the dairy, bakery and ice cream industries or supplied to beverage makers as top-quality fruit juice concentrates.

The shareholder structure of AGRANA centres around the strategic link between cooperative-based Austrian shareholders and the German group Südzucker AG Mannheim/Ochsenfurt, which each hold equity interests of around 37.75% in AGRANA. The remaining 24.5% of shares are in free float. AGRANA has been listed on the Vienna Stock Exchange since 1991.



¹ Status: 28 February 2013

² Joint venture

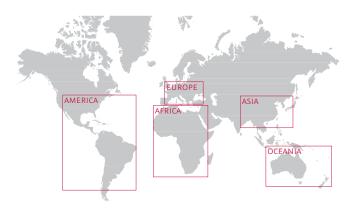
³ Status: July 2013

EUROPE



Sugar

▲ Starch
■ Fruit



AMERICA



AFRICA



ASIA



OCEANIA

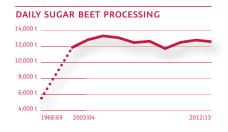




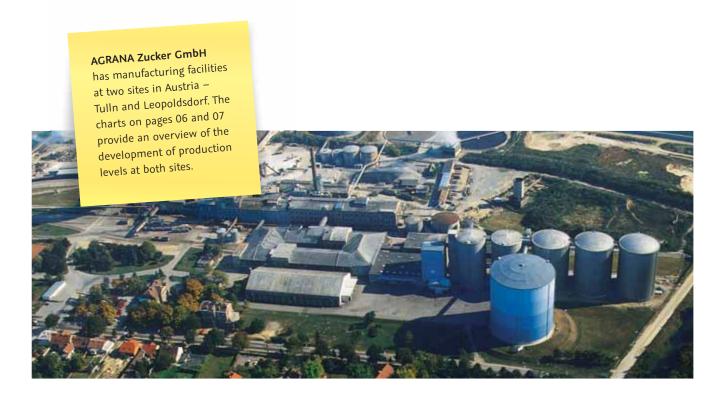
SUGAR FACTORY IN TULLN

The sugar factory in Tulln was founded in 1937 and therefore celebrated its 75th anniversary in 2012. The site in Tulln is nowadays home to the administration department of AGRANA Zucker GmbH as well as the central sugar facility in which all of the products obtainable under the Wiener Zucker brand in Austria are manufactured, packaged and fully automatically stored in and shipped from a high-bay warehouse with a capacity of around 8,000 tonnes of sugar.

A new silo for crystallised sugar was commissioned at the Tulln site in October 2011. With a storage capacity of 70,000 tonnes, this is the second largest sugar storage silo in Europe.



SUGAR SILO STORAGE CAPACITY		
1 silo with	70,000 t	
1 silo with	38,000 t	
2 silos each with 26,000 t	52,000 t	
2 silos each with 11,000 t	22,000 t	
Total capacity	182,000 t	

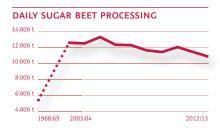


SUGAR FACTORY IN LEOPOLDSDORF

The sugar factory in Leopoldsdorf, built in 1901|02, was originally intended for processing raw sugar. It was converted to a white sugar factory in 1925.

Besides white sugar, this facility is also the only producer of yellow sugar in Austria. This yellow-brownish sugar is responsible for the distinctive aroma of gingerbread, for example. The Leopoldsdorf facility mainly ships sugar in bulk or packaged quantities (50 kg bags) to the food processing industry.

Low-energy dryers have been installed at the sites in Tulln and Leopoldsdorf and have enabled energy consumption in the production of animal feedstuffs at both to be cut by around 60%.



SUGAR SILO STORAGE CAPACITY	•
1 silo with	50,000
3 silos each with 16,000 t	48,000
2 silos each with 11,250 t	22,500
Storage area for palleted goods	2,000
Total capacity	122,500

Besides the two facilities in Austria, AGRANA also maintains seven other sugar production sites in five Central and Eastern European countries. AGRANA also operates a packaging and distribution centre in Bulgaria.

The Group is represented here through a wide range of products under the premium »Zahira« brand.



At its facility in Kaposvár, the AGRANA subsidiary Magyar Cukor Zrt. now operates the only sugar factory in Hungary following the restructuring necessitated by the EU sugar market reform. The processing capacity amounts to around 7,000 tonnes of sugar beet per day. In order to supply the deficit market, the Kaposvár facility also processed raw sugar to make white sugar during the 2012|13 campaign. Kaposvár is also home to one of the largest biogas plants in Europe, one which was able to cover approximately 66% of the primary energy requirements of the sugar factory during the past campaign.

AGRANA is a leading player in the Hungarian food sector with the »Koronás Cukor« brand.



CZECH REPUBLIC

Moravskoslezské cukrovary a.s., AGRANA's subsidiary in the Czech Republic, refines at total of 9,200 tonnes of sugar beet per day at its facilities in Hrušovany and Opava, sugar which is subsequently distributed under the brand name »Korunní Cukr«. AGRANA has developed to become a key market player in this country.



SLOVAKIA

During the most recent campaign, the sugar factory of AGRANA's Slovakian subsidiary, Slovenské cukrovary, s.r.o., in Sered, processed around 4,600 tonnes of sugar beet per day to make sugar which is sold on the Slovakian market under the »Korunný Cukor« brand.



S.C. AGRANA Romania S.A. operates two sugar factories in Romania which mainly refine raw sugar. The raw cane sugar grown in emerging markets such as Brazil and Thailand is shipped to Romania and processed to make white sugar at the AGRANA facilities. In addition to refining raw sugar, the factory in Roman also processes up to 4,700 tonnes of sugar beet per day.

The factory in Buzău operates exclusively as a raw sugar refinery. The products distributed in the Romanian retail market are sold under the »Mărgăritar Zahăr« brand.



BOSNIA-HERZEGOVINA

AGRANA opened the raw sugar refinery STUDEN-AGRANA Rafinerija Šećera d.o.o. in Brčko in 2008. This is a joint venture in which AGRANA and its long-standing distribution partner in the West Balkan region, Studen & Co Holding GmbH, both hold 50% stakes. This factory has a processing capacity of around 650 tonnes of raw sugar per day.

The sugar produced by STUDEN-AGRANA is marketed throughout the entire West Balkan region and Slovenia under the »AGRAGOLD« brand.



- AGRANA sugar factories
- INSTANTINA Nahrungsmittel Entwicklungs- und Produktionsgesellschaft m.b.H.

SUGAR BEET FARMING IN AUSTRIA

Sugar beet farming in Austria enjoys a long tradition: Sugar production began at a low level in the early 19th century and has since become a highly specialised branch of industry.

In 2013, sugar beet was grown by around 7,480 farmers in Austria. AGRANA enters into contractual relationships with these farmers, largely regulated by the EU sugar market regime, which commit the partners to respectively grow and purchase mutually agreed quantities. The required quantity of this commodity is defined on the basis of a quota agreed between AGRANA and the representatives of the beet growers.

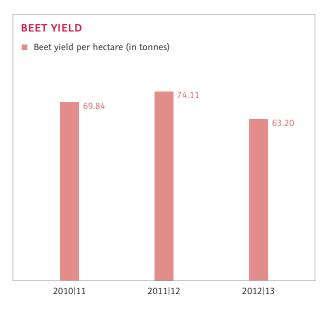
Depending on the weather conditions, sugar beet is planted between the end of March and the middle of April each year. The commodity experts of AGRANA are on hand to provide the farmers support in all growing and harvesting matters during the entire planting, growing and harvesting season.

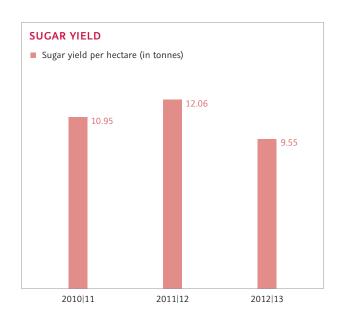
With the aid of a soil investigation method developed by AGRANA, it has been possible to tackle the problem of excessive fertilizer use: The electro-ultrafiltration method (EUF) has been in widespread use for more than two decades and has led to a reduction in the use of nitrogen-based fertilizers by up to two thirds. This method has also resulted in an increase in the sugar yield and improved the quality of Austria sugar beet, which is now among the best both in Europe and worldwide.

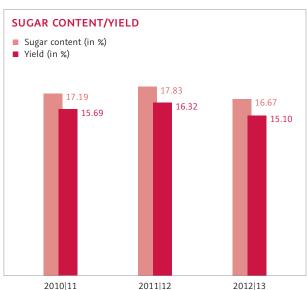
The sugar beet harvest starts between the beginning and the middle of September and is largely finished by the middle of November. The beets are harvested with machinery. These are then delivered by the farmers either to collection points or directly to the sugar factory and stored there until they are processed. Samples are taken from the beets delivered in order to test these for their sugar content and other important constituents.

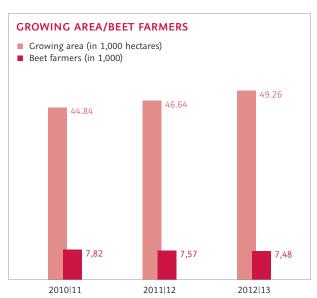
This analysis and determining the percentage of soil and any leaf or other plant material form the basis for the price paid to the farmer, which is calculated separately for every single farmer. Good cooperation between the sugar industry and the farmers is the key to achieving optimal returns in sugar beet farming under environmentally sensitive conditions.













FROM BEET TO SUGAR

Depending on the quantity of beet harvested, the sugar beet processing campaign in Austria lasts an average of around 130 days.

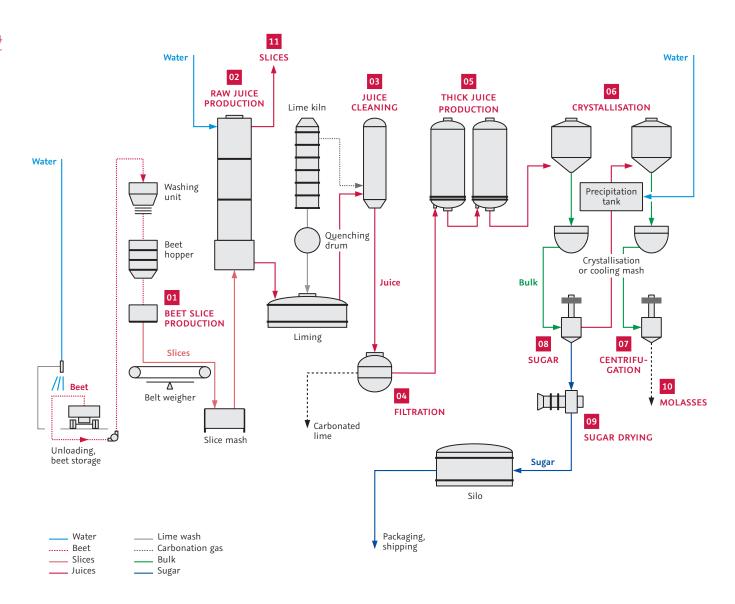
During the campaign, an average of around 814 personnel work at the sugar factories in Tulln and Leopoldsdorf, many of them around the clock in shifts. Calculated across an entire year, i.e. also at times other than during the sugar beet processing campaign between January and September, the average headcount is around 490.

SOME KEY SUGAR BEET PROCESSING FIGURES

- Around 80,000 sugar beets are harvested from a single hectare. In an average year, a sugar beet weighs between 0.7 and 0.8 kg. The yield per hectare is therefore between 69 and 72 tonnes. Depending on the sugar content, around six kilograms of sugar beet are needed to produce one kilogram of sugar.
- On the basis of an average processing volume, around 11,500 tonnes of sugar are produced from approximately 15 million beets per day at the two Austrian factories.
- 11,500 tonnes is equivalent to around 230 railway trucks each loaded with 50 tonnes.
- Flume water is needed in the factory in order to unload and clean the sugar beets. This water is circulated in a flume water system, i.e. it is cleaned and used again. A small quantity of it is cleaned in entirely biological water treatment plants so that only biologically cleaned waste water is fed into the outlet channel.

■ Around 1,100 kWh of energy is needed to produce one tonne of sugar. This energy is obtained from natural gas. Before the steam is supplied to the sugar production facility it is fed to the site's own power generation plant to be used for the purposes of generating electricity. The sugar factories in Tulln and Leopoldsdorf produce the electrical energy they require (13 MW) themselves.





01 BEET SLICE PRODUCTION

Cutting machines slice the beets into strips which have a sugar content of between 16 and 20%.

02 RAW JUICE PRODUCTION

The sugar is extracted from the slices by means of hot water (around 70° C) in a diffuser, with the slices moving in the opposite direction to the water flow, in a process known as extraction. The result is raw juice. This contains around 98% of the sugar contained in the sugar beet as well as organic and inorganic constituents (so-called non-sugars) from the beet.

03 JUICE CLEANING

The non-sugars in the raw juice are bound and extracted by means of the natural substances lime and carbonic acid gas which are produced in the site's own lime kiln.

04 FILTRATION

The flocculatable insoluble non-sugars and the lime are filtered off in filter units. The filtrate is known as thin juice and the filter residue as carbonated lime. This is an important soil improver which is spread on the fields.

05 THICK JUICE PRODUCTION

The thin juice is thickened in the course of a multi-stage evaporation process. The result is the so-called think juice. The operation of on-site power plants provides the considerable quantities of energy needed for sugar production. The steam produced in the high-pressure boilers is used in the turbo generators to produce electricity. The waste steam from the turbines is used as process heat (cogeneration) in order to heat the evaporator station.

06 CRYSTALLISATION

The thick juice is thickened further in the evaporators under vacuum. The crystallisation process is triggered by adding (spiking) the thick juice with finely ground sugar. Further evaporation allows the crystals to grow to the desired size.

07 CENTRIFUGATION

The sugar crystals are separated from the syrup by means of centrifuging. The separated syrup is subjected to a further two crystallisation steps.

08 SUGAR

The pure, crystal-clear sugar appears white when subjected to white light. White sugar contains at least 99.7% sucrose. The remainder is in effect moisture.

09 SUGAR DRYING

White sugar is dried in an air stream, cooled and stored in silos. In its many forms and packaged in numerous different household and industrial volumes, sugar is an important nutritional and semi-luxury foodstuff which then makes its way to the end consumer.

10 MOLASSES

The syrup separated off during the final crystallisation step is known as molasses. Molasses contains the non-crystallised sugar (6 to 9% of the sugar in the sugar beet) and the soluble non-sugars from the sugar beet. This represents a valuable foodstuff for the baking yeast and animal feed sectors as well as being used in the production of alcohol.

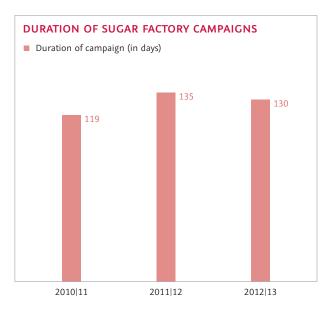
11 SLICES

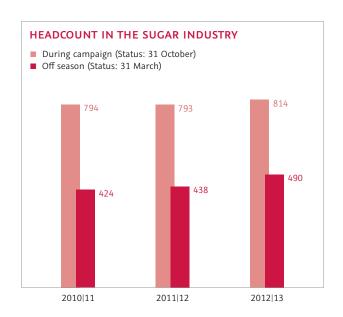
The slices from which the sugar juice is extracted in the extraction tower are mechanically pressed and, following the addition of the molasses, dried in a drying tunnel before being pelleted and sold as animal feed.

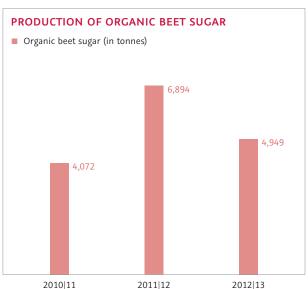


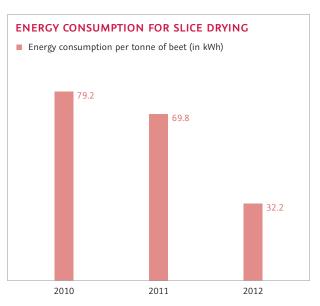
Organic raw sugar is made from organically grown sugar beet using the process of spray drying. This preserves the typically malty, natural aroma. Organic raw sugar adds a special aroma to pastries and mixtures with fruit, nuts, chocolate and spices and can also be used to sweeten muesli, fruit yoghurts and hot beverages such as coffee and tea.

Order your free recipe book now at www.wiener-zucker.at









OUR COMMITMENT TO THE ENVIRONMENT



Our responsibility vis-a-vis the environment has been defined in our mission statement.

The resource-sensitive and sustainable use of energy and raw materials is a commitment incumbent on the current and future generations. AGRANA invests considerable amounts every year in the areas of transport, energy supply, production and packaging in order to achieve reductions in terms of costs, and does so taking environmental protection measures into account.

- In terms of raw materials, the electroultrafiltration (EUF) method has been continuously further developed since the middle of the 1970s. This method makes it possible to determine the nutrient reserves of the soil and, as a result, to reduce the use of fertilisers. For example, the use of nitrogenbased fertilisers has been cut by up to two thirds in the past 40 years.
- The gypsum absorber block method ensures that neither too little (risk to the yield) nor too much (waste

- of water, negative impact on soil and plants) irrigation is used.
- 55% of beet transport is now based on environmentally sensitive rail-based services
- Hygiene is an absolute must for food producers. AGRANA Zucker GmbH works in compliance with the EU food hygiene directive based on the HACCP concept (Hazard Analysis and Critical Control Points), which is regularly updated to reflect the latest findings.

- The reduction and optimisation of the use of processing aids during production is particularly important for us. AGRANA therefore relies on hop extracts and resins in order to disinfect the extraction facilities. This process was developed by our R&D division (Zuckerforschung Tulln GmbH) and corresponding patents have been filed internationally.
- In as far as this is commercially viable, we have switched from the use of heavy heating oil to nearly SO₂ and particle-free natural gas.
- Due to the installation of wet dust separation systems, the steam emitted by the slice drying plant is practically free of dust
- The introduction of chromatography means that a physical process is now used to extract sugar from molasses rather than processes which contaminate waste water.
- The process heat and electrical energy needed to process the sugar beets is generated by cogeneration plants (steam and gas turbines). The high utilisation rate of the energy consumed means that fewer fossil fuel sources are necessary and lower specific emission levels are achieved.

- Despite the rising production volumes, it has been possible as a result of energy-saving investments to cut the CO₂ emissions during the sugar beet campaign by more than 40% since 1990. AGRANA therefore makes a significant contribution to reducing the burden on the environment and achieving Austria's Kyoto target.
- Both Austrian sites have been equipped with low-energy dryers. The use of waste heat has enabled the use of natural gas to dry the slices to be cut by more than half.
- All facilities within the AGRANA Group are equipped with organic waste water treatment plants.
- Every site also sells the carbonated lime used to clean the beet juice, a valuable source of calcium rich in many nutrients, so that it can be spread on the beet fields as a fertiliser.
- Extensive noise protection measures have been introduced at both facilities in Austria in order to significantly reduce noise emissions.

■ The new sugar silo in Tulln has reduced the need to ship sugar to external storage facilities and therefore led to a considerable reduction in annual CO₂ emissions. In addition, previously unused waste heat from the production of sugar is now used to heat and condition the silo, which also reduces CO₂ emissions.





SUGAR: A PURE, NATURAL PRODUCT

Sugar is produced from sugar beet without the addition of any additives and is therefore a carbohydrate in its purest form. Carbohydrates are particularly important in our lives due to the fact that they are our body's preferred source of energy. A balanced diet should rely on 50 to 55% of energy from carbohydrates, with a further 10 to 15% obtained from proteins and between 30 and 35% from fats.

THERE ARE SUGARS AND SUGARS

The beet sugar produced at the AGRANA sites consists of nearly 100% pure sucrose. Sucrose is a disaccharide which is formed from the chemical building blocks of fructose and glucose. All forms of sugar, also including maltose and lactose besides sucrose, are converted by our bodies into glucose, which is a valuable source of energy. Sugar is therefore a valuable source of energy and new strength which organisms need, particularly after physical exercise.

SUGAR AND CARIES

It is not sugar but a lack of oral hygiene which is responsible for tooth decay (caries)! All carbohydrates, regardless of whether from apples, bread or rice, encourage the formation of acid in the mouth. The type of carbohydrates plays a less important role in the formation of caries than the frequency carbohydrates are consumed and how long these carbohydrates are in contact with the teeth. If you clean your teeth regu-

larly (that means at least twice a day) with toothpaste containing fluoride, you can avoid tooth problems.

SUGAR - A CAUSE OF OBESITY?

Sugar has no particular characteristics which justify labelling it as a primary cause of obesity. On the contrary: The conversion of carbohydrates, and therefore also sugar, into body fat is a process which requires more energy than the conversion of fats from food into body fat. The only people who become fat are those who eat too much as a whole and who take too little exercise. One gram of sugar has the same number of calories as one gram of protein, i.e. 4 kcal, and therefore less than half that of one gram of fat (9 kcal). A sugar cube, for example, doesn't have more than 15 kcal (63 kJ).

SUGAR AND NUTRIENTS

Due to its high degree of purity, nearly 100% sucrose, sugar is often referred to as a source of 'empty calories' and a vitamin depletory. The concern that sugar consumption will reduce the uptake of nutrients such as vitamins and minerals is unfounded. Sugar rarely or never

is consumed in isolation but always as a sweetening agent with different foods. With its sweet taste, sugar also often contributes to nutrient-rich products with an unattractive taste becoming more accepted by consumers. The accusation of vitamin depletion is not justified. Vitamin B1 in our metabolism ensures

that sugar is utilised. However, this also applies to other carbohydrates, i.e. from bread, potatoes and noodles. Our body sources vitamin B1 from a mixed diet. One more reason to ensure a balanced and moderate diet with carbohydrates, fats and protein as well as vitamins and minerals.

THE HISTORY OF SUGAR

Everything started with sugar cane in East India, where syrup was produced exclusively from sugar cane. On his second voyage of discovery, Christopher Columbus planted sugar cane on Hispaniola (the Dominican Republic and Haiti) in 1493. Besides the global market leader Cuba, this island is today still a key cane sugar producer.

In our latitudes, however, it wasn't sugar cane but sugar beet which became established. The first state-supported attempt at producing sugar from beets was undertaken in 1810.

In 1843, the first sugar cubes were introduced to the market, invented by sugar plant director Jakob Christoph Rad based on a suggestion made by his wife. Since around 1850, sugar has been produced industrially and the production processes continuously improved.

As a result of this, the price of sugar fell and sugar become a daily food item. Since the middle of the 1980s, however, consumers have been gradually reducing their consumption of sugar. Despite this, AGRANA has been ultimately been successful in re-establishing 'sweet gold' as a foodstuff with a positive image. Thought was given to creating an impression of quality by means of different products and packaging units. The result has been a wide range of sugar varieties, carefully tailored to the different intended uses and the users.

Our brand, Wiener Zucker, is now a part of the Austrian pastries culture and therefore an intrinsic part of the sweet side of life in Austria. With its numerous sugar varieties, AGRANA offers a degree of product diversity which is unique – worldwide.

OUR BRAND - WIENER ZUCKER

The sugar produced at the sites in Tulln and Leopoldsdorf is sold to consumers under the Wiener Zucker brand.

Both attractive packaging designs and consistently high quality levels are the keys to the success of Wiener Zucker.

With 33 different varieties, consumers are spoilt for choice.

THE SWEET SIDES OF AUSTRIA

The sugar produced from Austrian sugar beets is top in terms of its purity due to its consisting almost entirely of sucrose as a result of the controlled farming methods used and the continuously quality tests it is subjected to. The Wiener Zucker brand has long been synonymous with top quality and therefore is firmly trusted by Austrian consumers.

The unparalleled range of Wiener Zucker varieties is inextricably linked to the sugar culture of Austria and its tradition of cakes and pastry delicacies: Whether 'Sachertorte', pancakes, semolina or 'Salzburger Nockerl' – one ingredient makes all of these famous desserts unmistakeable: Wiener Zucker!

SUGAR AND ITS MANY FORMS

Presses are used to create the various sugar cube varieties and the so-called

'Zuckerhut'. Grinding is used to make icing and baking sugar. Caster sugar is particularly fine icing sugar which doesn't form lumps and doesn't melt even on warm pastries and cakes. Besides sugar, gelling sugar also contains apple pectin, as a gelling aid, and citric acid. White and brown rock sugar is made from a top quality sugar solution by means of a slow crystallisation process. Brown sugar is crystallised sugar improved with sugar cane syrup. Fructose plays a role in calorie-controlled nutrition. Glucose is perfect for everyone who urgently needs extra energy. A wide range of sugar specialities are also made for the food processing industry.

ORGANIC SUGARS

It was not long ago that Wiener Zucker launched the first 'white' organic granulated sugar. This product highlighted that careful and sustainable nutrition can be combined with pleasure.



Besides organic granulated sugar and organic gelling sugar 2:1, organic raw sugar is now also available. Whatever you are looking for, we have it: organic granulated sugar – the classic variety, organic raw sugar – the aromatic

option, organic caster sugar for cakes and pastries and to sweeten muesli, yoghurts and beverages, organic gelling sugar 2:1 – the ideal solution for preparing delicious jams.

WIENER SYRUP SUGAR FOR HERBS AND BERRIES

Wiener Zucker launched two varieties of syrup sugar in May 2011: These products, one for herbs and the other for berries, are proving to be a sales success.



The syrup sugar for herbs, fine crystallised sugar mixed with citric acid, is ideal for quickly and easily making home-made syrups (cordials) from elderflower and herbs.

For lovers of fruit cordials, there is also a syrup sugar for berries and stone fruit. The added pectinase prevents excessive gelling as a result of the fruit's own pectin.







Sugar syrup for herbs Sugar syrup for berries Rock candy sticks

Sachets Gelling sugar 3:1 Organic gelling sugar 2:1 White rock candy

Bridge sugar cubes Gelling sugar 2:1 Gelling sugar 1:1 Brown rock candy Cone sugar Fine crystallised sugar Sugar cubes Icing sugar

Crystallised sugar Glucose Fructose Yellow sugar

Sugar-cinnamon dispenser Sugar-vanilla dispenser Baking sugar Organic crystallised sugar Caster sugar jar Crystallised brown cane sugar Brown sugar

Sugar crystals Demerara sugar cubes Brown sugar sachets Organic cane sugar

Icing sugar dispenser Espresso sugar cubes Caster sugar refill pack

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President: Ernst KARPFINGER

Associations and organisations

Verband der Zuckerindustrie (Sugar Industry Association) – a member of Fachverband der Nahrungs- und Genussmittelindustrie (Food and Luxury Food Professional Association)

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Chairman: Johann MARIHART Deputy Chairman: Walter GRAUSAM General Manager: Bruno MAYER Fachverein der Zuckerindustrie Österreichs (Professional Association of the Austrian Sugar Industry)

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Phone: +43-2272-602-11237 Chairman: Martin DOPPLER

Austrian sugar museum

A-3430 Tulln, Minoritenplatz 1, top floor

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Visits possible during the opening hours of the Tulln citizen's service (Bürgerservice);

Phone: +43-2272-690-600: Mon-Wed: 7:00-15:30 Thu: 8:00-19:00

Fri:

7:00-12:00



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