



THE SÜDZUCKER GROUP  
**COMPANY PROFILE**  
**2023/24**



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# 1. The Südzucker Group



© Dennis Möbus/Südzucker

# 1.1 Südzucker Group: Overview



One of the leading food industry companies



Segments sugar, special products, CropEnergies, starch and fruit



About 18,300 employees<sup>1)</sup> worldwide



About € 9.5 billion annual revenues



About 100 production locations worldwide



Formation 1926



Number one supplier of sugar products in Europe in the traditional sugar business



3.7 million tonnes of sugar production in the 2022/23 campaign



Processing of about 30 million tonnes of renewable agricultural raw materials per year



Fiscal year: 1 March to 28/29 February



Legal form: stock corporation under German law












Member of the German SDAX<sup>®</sup>

<sup>1)</sup> Full-time equivalents.



# 1.2 Südzucker Group's segments

*Sugar is our core business, yet Südzucker is more than sugar ...*

	 <b>Sugar segment</b>	 <b>Special products segment</b>	 <b>CropEnergies segment</b>	 <b>Starch segment</b>	 <b>Fruit segment</b>
 <b>Companies</b>	Südzucker, Raffinerie Tirlémontoise, Saint Louis Sucre, Südzucker Moldova, Südzucker Polska, AGRANA	BENEO Freiberger PortionPack	CropEnergies	AGRANA	AGRANA AUSTRIA JUICE
 <b>Products</b>	Sugar, sugar specialties, glucose syrups, animal feed	Functional ingredients Convenience Food Portion packs	Fuel ethanol, neutral alcohol, high-protein food and animal feed, liquid CO <sub>2</sub>	Native and modified starches, saccharification products, ethanol, co-products (animal feed and fertilizers)	Fruit preparations Fruit juice concentrates
 <b>Production</b>	23 sugar factories, 2 refineries, 1 wheat starch plant in Europe	24 production sites worldwide	4 production sites in Belgium, France, Germany and Great Britain	5 production sites in Austria, Hungary and Romania	40 production sites worldwide
 <b>Customers</b>	Food industry, retailers, agriculture	Food, animal feed, pharmaceutical industries Food retailers Hotels, gastronomy, caterers	Oil companies and traders, food and animal feed producers, beverage and cosmetics producers, industrial and pharmaceutical companies	Food, paper, textiles, construction chemistry, pharmaceutical, cosmetics, petroleum, animal feed industries	Dairy, ice cream and baked goods industries, food services Beverage industry

## 1.3 The range of Südzucker products

### Video

As a leading integrated group, we harness the power of plants to produce a wide range of products for many different areas of everyday life, including sugar. But Südzucker does much more in the areas of nutrition and energy, as well as packaging and cosmetics.



That is why our short film takes a look at a day in the life of Sarah. She guides us through the world of Südzucker and shows us the huge variety of products.

[Watch the video on YouTube](#)

Note: We use YouTube for the display of videos. When calling up the link, you will leave the Südzucker environment and be redirected to YouTube. In this way, your personal data is also transmitted to YouTube. Please note [Google's](#) data protection information before calling up. We also take the liberty of referring to our [privacy policy](#).



## 2. GROUP STRATEGY 2026 PLUS



# Get the Power of Plants

GROUP STRATEGY 2026 PLUS



## 2.1 The core of our Group Strategy 2026 PLUS

With Group Strategy 2026 PLUS, Südzucker Group will be even more innovative, customer-focused and consistently aligned to sustainability and profitable growth.

Our aim is to be the leading partner for plant-based solutions for a livable, healthy and sustainable world.

The underlying principle common to all our business units is “Get the Power of Plants”: through the power of plants, we are further expanding our expertise in nutrition, energy and beyond, and strengthening our company’s position.

Our strategy is based on our Purpose, Mission and Vision.



### PURPOSE

Our Purpose is to contribute to an enjoyable, healthy, and sustainable world based on the power of plants.



### MISSION

Our mission is to create value from plants – for nutrition, energy and beyond – being the partner of choice for farmers, customers and consumers.



### VISION

Our Vision is to become the leading integrated group for plant-based solutions – locally, regionally & globally.

## 2.2 Strategic goals and implementation

### Fields of action and focus initiatives

#### Our five strategic fields of action

##### Our employees

Using the skills and passion of our employees to leverage more power from the Group

##### Sustainability

Committed to sustainable business

##### Markets and customers

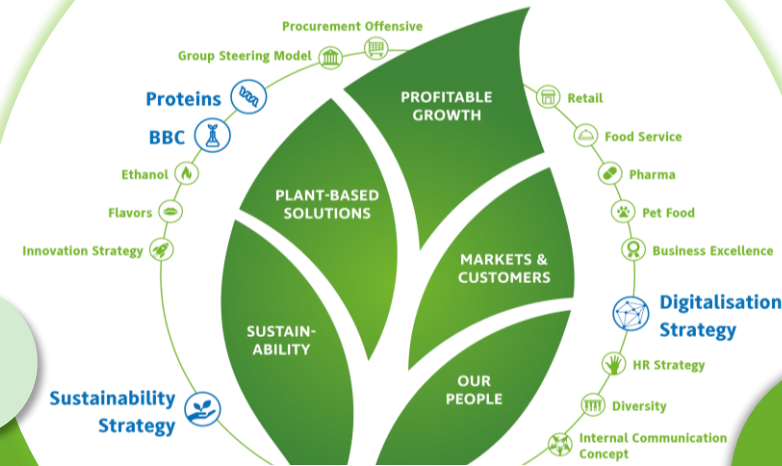
Market and customer access improvement

##### Plant-based solutions

Expansion of technology- and market-driven value creation from plant-based raw materials

##### Profitable growth

Growing more profitably and faster than competitors



These strategic fields of action include numerous focus initiatives.

Material aspects are the combination of economy and ecology, the extension of the value chain, and the expansion and supplementation of our product portfolio.

## 2.3 Four focus initiatives in the spotlight



### Proteins

Changing dietary habits, climate protection and animal welfare considerations continue to drive demand for plant-based protein products. In this context, Südzucker's focus is on the sales market for plant-based meat and fish alternatives.

Our goal is to increase the added value of our existing protein sources as well as to develop new protein sources and establish additional businesses for the application of these proteins.



### Bio-based chemicals

Both the chemical industry and many further processing industries face the challenge of replacing their products with sustainable, bio-based alternatives over the long term.

Südzucker Group sees itself as a natural partner here to support the industry – where decarbonization is not possible – on the path to defossilization.



### Sustainability

Südzucker Group is committed to sustainable business in all areas of the company and its activities.

To this end, we have developed a Group-wide sustainability program and a wide range of sustainability measures

To reduce our energy requirements and switch to other energy sources, we have set ourselves clear goals with a long-term climate strategy.



### Digitalization

For the Südzucker Group digitalization means ensuring and advancing an adequate, efficient IT infrastructure that digitally connects as many areas of the company as possible while supporting both existing and emerging business models.

Networked solutions create a solid foundation for greater resource efficiency, strengthen our position in the competitive environment and make a decisive contribution towards sustainability.



# 3. SUSTAINABILITY

© Sergey Ryumin/Getty Images



## 3.1 “Growing in Balance”: Our understanding of sustainability



For us at the Südzucker Group, “Growing in Balance” means harnessing the passion and expertise of all of our employees in their diverse roles to create value that is in harmony with people and the planet.

In everything we do, we aim to strike a balance between economic, ecological and social issues, as well as the various expectations of our stakeholders, which we proactively include.

Together, we can help create a future worth living in.

## 3.2 The pillars of our sustainability strategy



### PLANET

Protecting and restoring the environment

As we continue to develop, we are taking responsibility for protecting and restoring the environment.

### PEOPLE

Acting in partnership

As we continue to develop, we are taking responsibility for the people around us, with whom we are connected in many ways.

### VALUE

Promoting quality and innovation

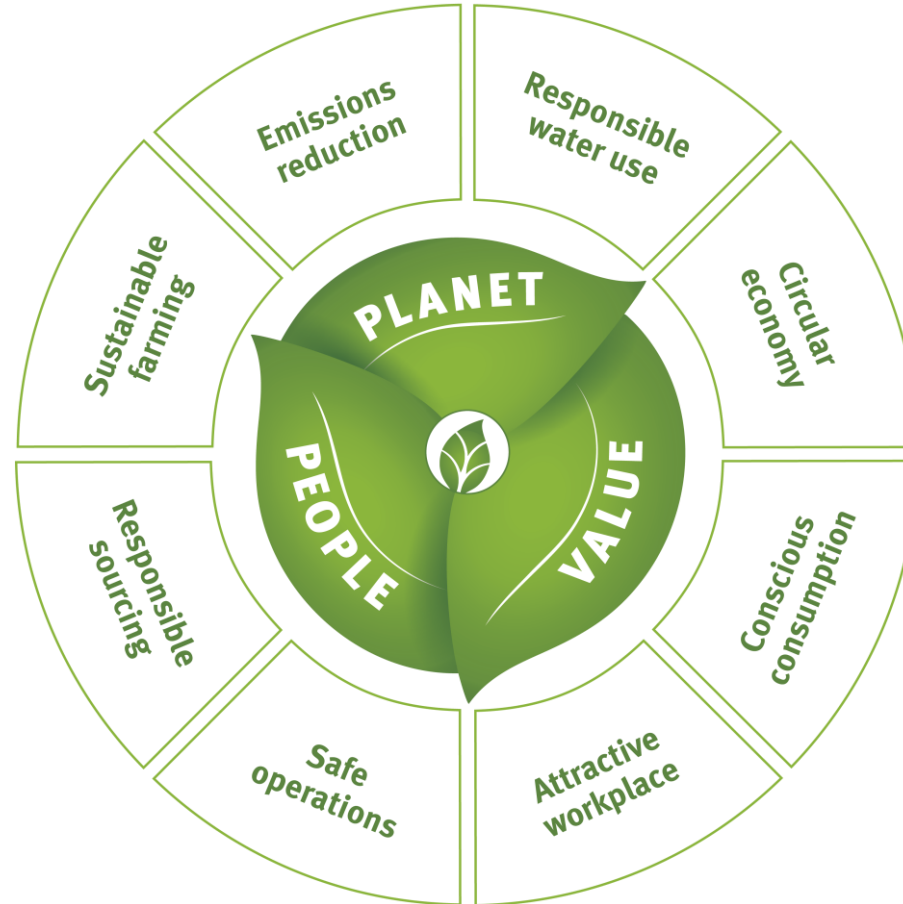
As we continue to develop, we are taking responsibility for high-quality, innovative products and services, which form the foundation of our economic success.



# 3.3 Our sustainability program



At Südzucker Group, we focus on eight impact areas



### Emissions reduction

We strive for net climate neutrality by continuously reducing our greenhouse gas emissions in cooperation with our partners.

### Sustainable farming

Together with farmers, we are committed to develop more sustainable agriculture by focusing on improving soil health, biodiversity, climate and water resources while strengthening family farming.

### Responsible sourcing

We increase the resilience of our supply chains by advocating human rights and environmental concerns and by fostering responsible supplier relationships.

### Safe operations

We create a working environment and safety culture that puts people's health and safety first by continuously optimizing our production facilities and constantly focusing on safe behavior.

### Responsible water use

We use water responsibly by minimizing our consumption and using the water contained in agricultural commodities in our processes.

### Circular economy

We generate value by making full use of agricultural commodities, minimizing waste and packaging, and thereby promoting the circular economy.

### Conscious consumption

We foster responsible consumer behavior by offering innovative, high-quality products and services and encouraging their responsible and enjoyable use.

### Attractive workplace

As an employer of choice, we create an attractive workplace by using diversity as a strength and promoting participation and individual development.

## 3.4 Our emission reduction targets

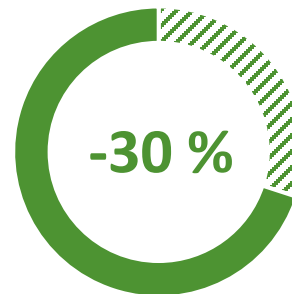
Validated by Science Based Targets initiative (SBTi)

**Südzucker Group is the first European sugar producer with validated emission reduction targets (Scope 1 & 2) in line with the 1.5-degree target**

- The validation of our emission reduction targets by the SBTi is an important milestone in the impact area “emissions reduction” of our sustainability strategy.
- SBTi is a joint initiative of CDP, the United Nations Global Compact, the World Resources Institute and the World Wide Fund for Nature, and an internationally recognized gold standard for corporate climate targets.



**Emissions Scope 1 & 2 by 2030**  
(starting from 3.7m t CO<sub>2</sub> in 2018)



**Emissions Scope 3 by 2030**  
(starting from 9.4m t CO<sub>2</sub>eq in 2018)

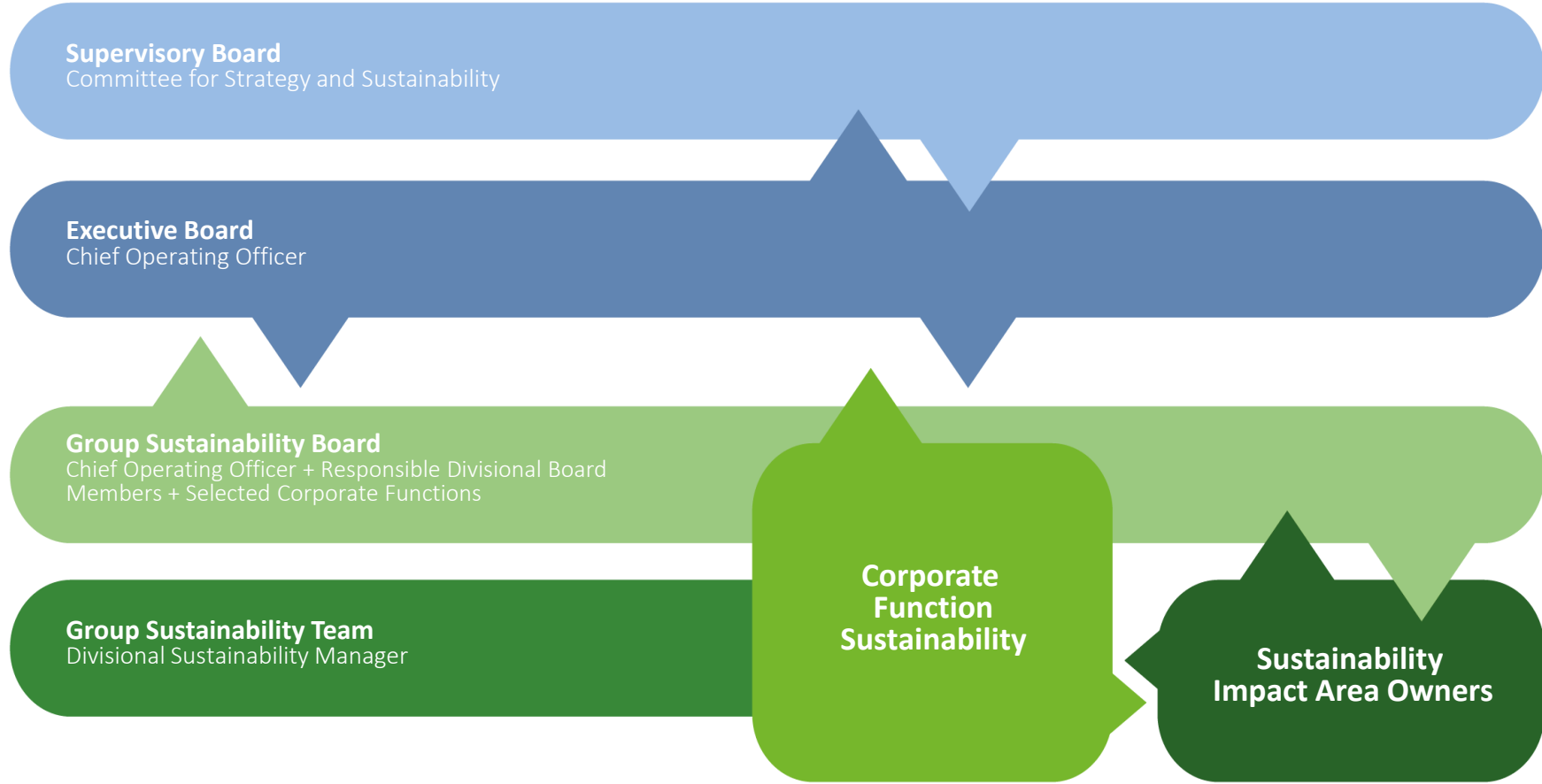


**Climate neutrality of Südzucker Group by 2050**  
(Scope 1, 2 & 3)

# 3.5 Our sustainability organization



*Together, we ensure the development and implementation of our sustainability strategy*





# 4. PEOPLE & FIGURES

AIU  
EJK  
HPL  
KEE  
NAH  
QOP  
TIK  
WIG  
AHD

AIU 1,822 (-35)	HJI 20,369 (+580)	WWE 890 (-20)	PLD 6,350 (-200)
MBC 3,605 (+210)	LJH 9,542 (-128)	MJB 2,609 (+35)	PON 7,654 (+169)
YBV 3,204 (-3)	OMN 5,211 (+156)	MMJ 7,100 (-60)	ITT 7,150 (-150)
HEE 3,320 (-133)	WFF 712 (+12)	HJM 134 (+5)	QLC 2,022 (-18)

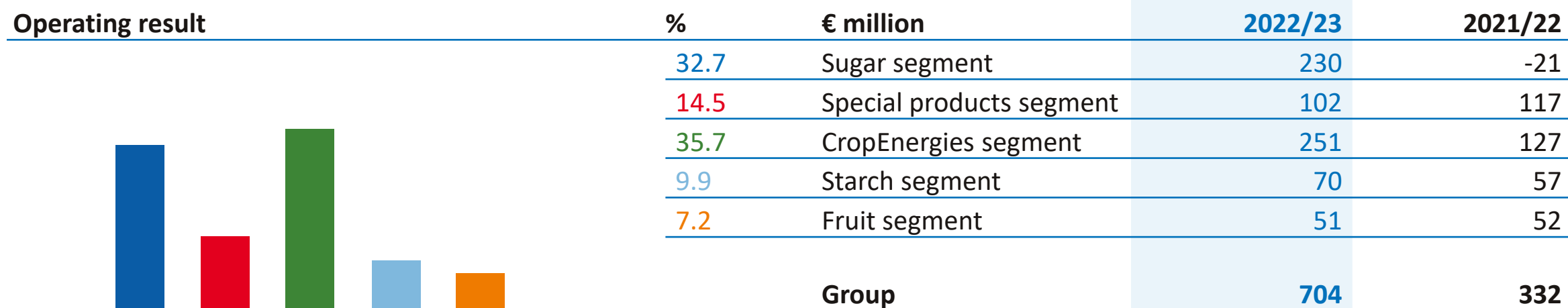
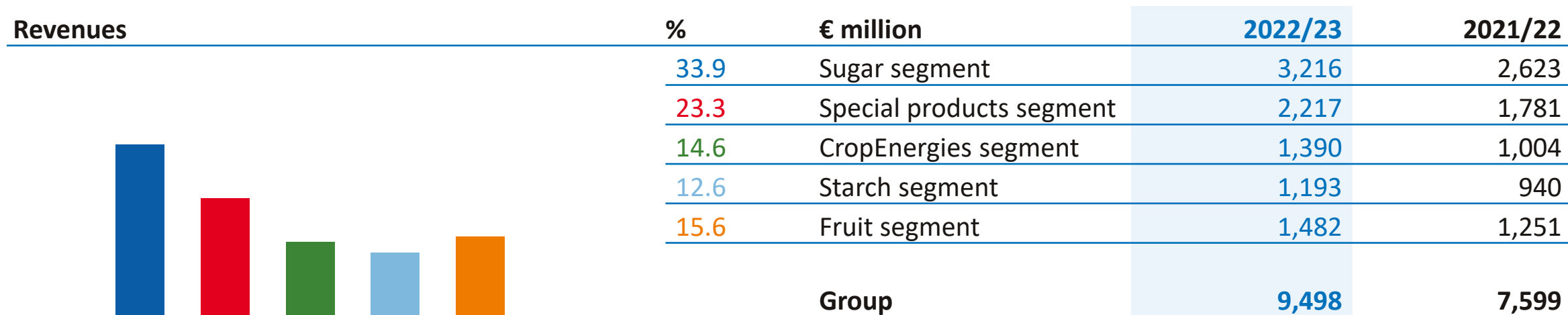


## 4.1 Financial figures: Business development in the Group

*Fiscal year 2022/23*

		2022/23	2021/22
<b>Revenues</b>	€ million	<b>9,498</b>	<b>7,599</b>
<b>EBITDA</b>	€ million	<b>1,070</b>	<b>692</b>
EBITDA margin	%	11.3	9.1
Depreciation	€ million	-366	-360
<b>Operating result</b>	€ million	<b>704</b>	<b>332</b>
Operating margin	%	7.4	4.4
Result from restructuring/special items	€ million	-3	-42
Result from companies consolidated at equity	€ million	30	-49
<b>Result from operations</b>	€ million	<b>731</b>	<b>241</b>
Investments in fixed assets and intangible assets	€ million	400	332
Investments in financial assets/acquisitions	€ million	67	4
<b>Total investments</b>	€ million	<b>467</b>	<b>336</b>
Shares in companies consolidated at equity	€ million	78	77
Capital Employed	€ million	7,095	6,325
Return on Capital Employed	%	9.9	5.3

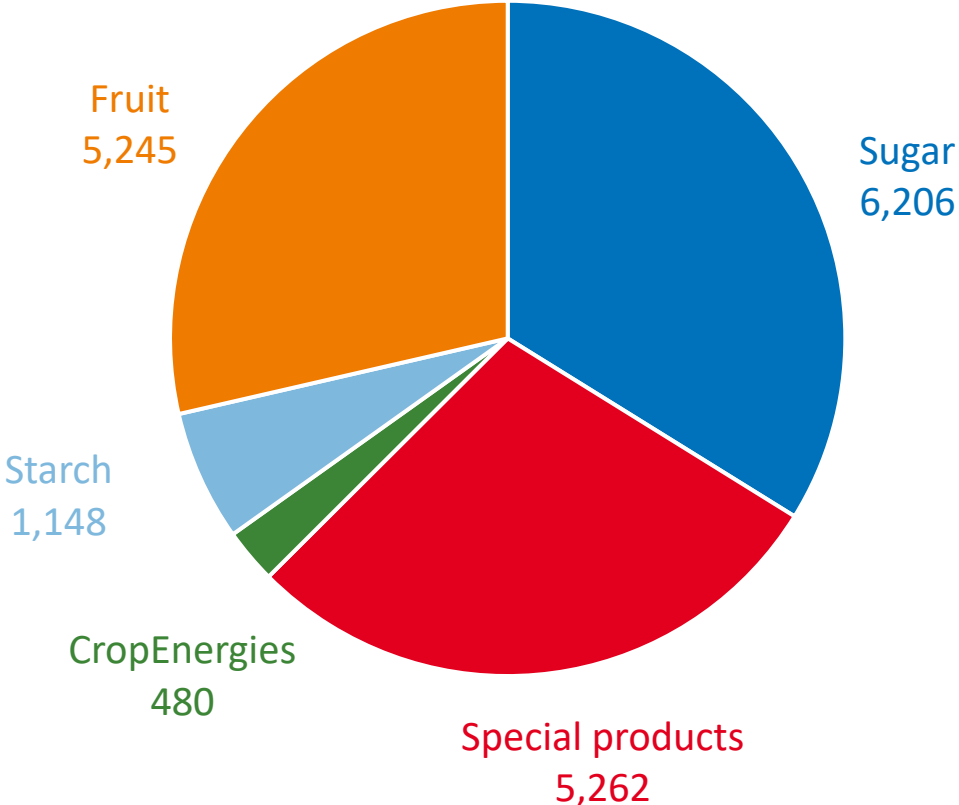
## 4.2 Segment figures, fiscal year 2022/23



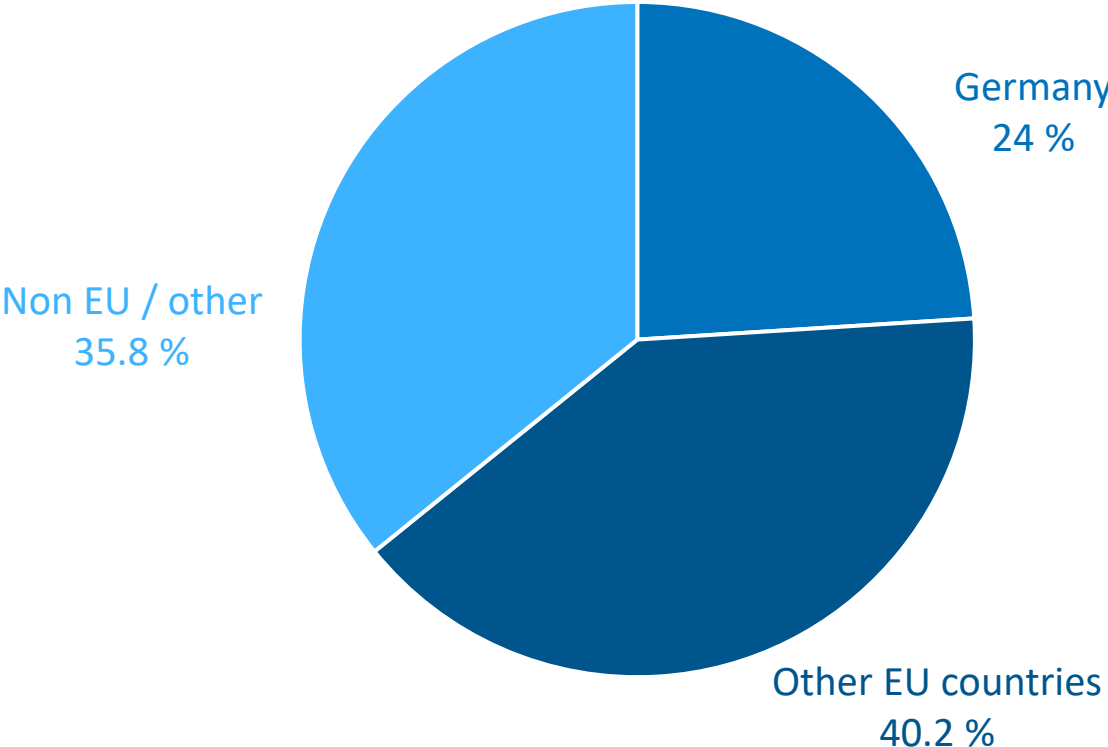
# 4.3 Employees, fiscal year 2022/23

Südzucker Group

Total employees\*: 18,341



Employees by region



\*Full-time equivalents as of 28 February 2023.



## 4.4 Executive board



**Dr. Niels Pörksen**

Chairman / Chief Executive Officer (CEO)  
Labor Director

- Strategy & Transformation
- Human Resources
- Communication
- Data Protection
- Raw Material & Agriculture
- Internal Audit & Compliance
- Sugar (Südzucker)
- Special Products (BENEO)



**Stephan Büttner**

COO (CEO AGRANA)

- Fruit
- Starch
- Sugar (AGRANA)



**Hans-Peter Gai**

Chief Operating Officer (COO)

- Technical & Operations Excellence
- Research, Development & Innovation
- Digitalization & IT
- Sustainability, Environment & Health and Safety
- Quality Management
- Corporate Development
- Special Products (Freiberger, PortionPack Group)
- CropEnergies



**Thomas Kölbl**

Chief Financial Officer (CFO)

- Controlling
- Finance
- Investor Relations
- Legal
- Purchase
- Real Estate & Insurance
- Taxes



**Dr. Stephan Meeder**

## 4.5 Supervisory board

- Chairman: Dr. Stefan Streng<sup>1)</sup>
- 2 Deputy chairmen:  
Rolf Wiederhold<sup>2)</sup> and Erwin Hameseder<sup>1)</sup>
- 8 further shareholders' representatives
- 9 further employees' representatives
- Südzucker largely complies with the recommendations of the Government Commission “German Corporate Governance Code”

<sup>1)</sup> Shareholder representatives; <sup>2)</sup> Employee representatives.





# 5. SÜDZUCKER SHARE & CAPITAL MARKET



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## 5.1 Südzucker share: Overview

*Fiscal year 2022/23*

		2022/23	2021/22
Market capitalization <sup>1)</sup>	€ million	3,278	2,493
Freefloat - market capitalization <sup>1)</sup>	€ million	951	723
Number of shares issued at € <sup>1)</sup>	million shares	204.1	204.2
Xetra® closing price <sup>1)</sup>	€	16.06	12.21
High of the year (Xetra®)	€	17.36	14.52
Low of the year (Xetra®)	€	10.05	11.83
Average trading volume/day <sup>2)</sup>	thousands of shares	539	523
Cumulative trading turnover	€ million	1,894	1,793
SDAX® closing rate <sup>1)</sup>	points	13,383	14,475
Performance Südzucker share (1 Mar. to 28 Feb.) <sup>3)</sup>	%	35.5	-4.8
Performance SDAX® (1 Mar. to 28 Feb.)	%	-7.5	-4.2
Dividend <sup>4)</sup>	€/share	0.70	0.40
Dividend yield	%	4.4	3.3
Earnings per share	€	1.93	0.32

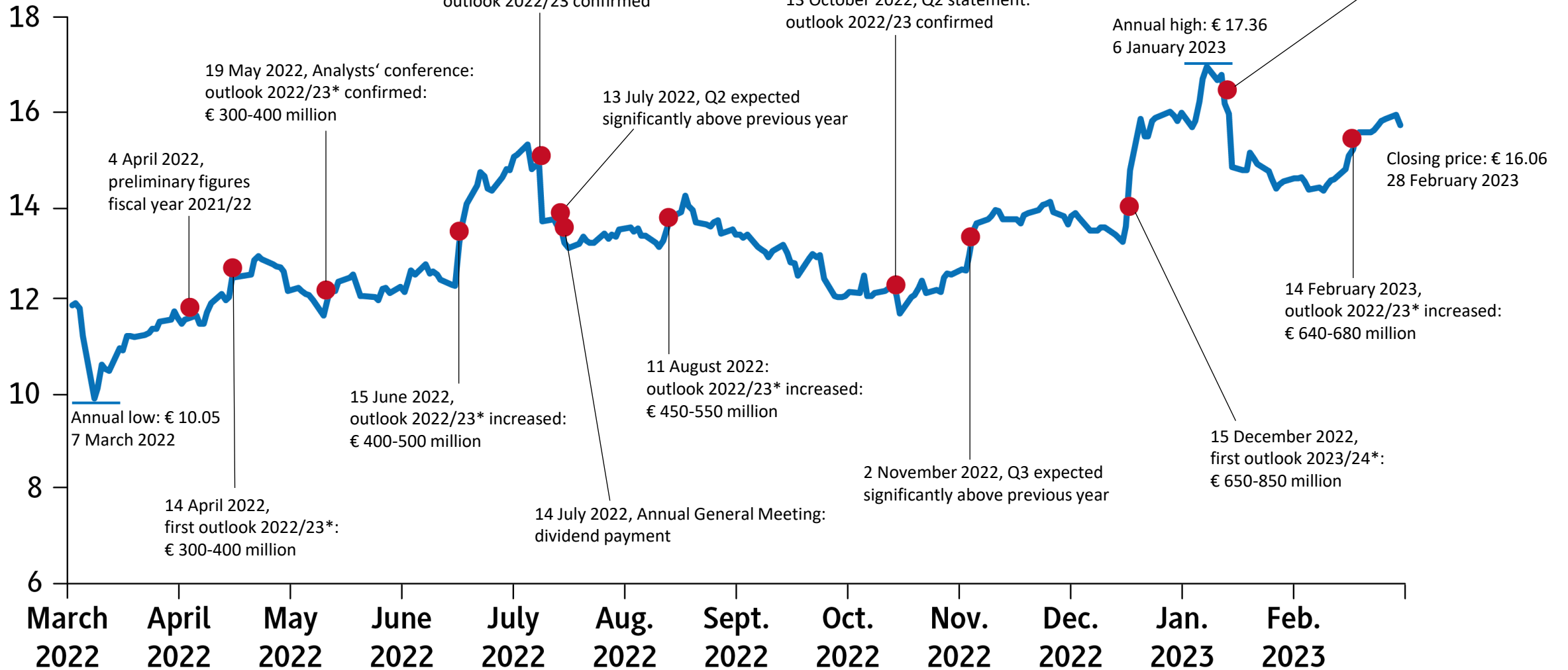
<sup>1)</sup> Balance sheet date. <sup>2)</sup> Total daily trading volume on all German stock exchanges where the share is admitted for trading.

<sup>3)</sup> Südzucker total return index, considers share development and dividend distribution. <sup>4)</sup> 2022/23: proposal.



## 5.2 Südzucker share: Share price movement, fiscal year 2022/23

Share price in €

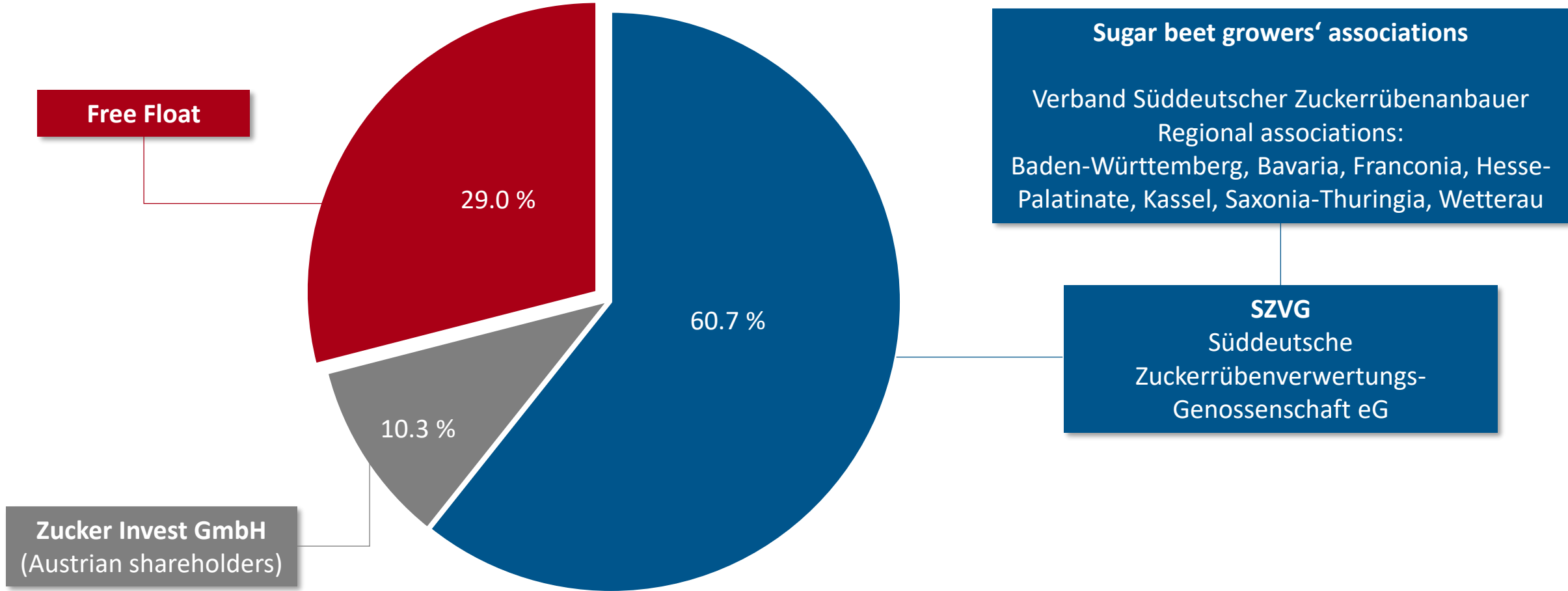


\*Unless explicitly stated otherwise, the outlook relates to the expected consolidated operating result during the respective fiscal year.

The current share price movement can be found here: <https://www.suedzucker.com/en/investor-relations/share>

# 5.3 Shareholder structure of Südzucker AG

**Südzucker AG**  
Subscribed capital € 204.1 million



Status at: 28 February 2023

## 6. SUGAR SEGMENT



© SMarina/shutterstock.com



## 6.1 Sugar segment: Overview



### Südzucker Sugar Division

- Sugar factories of
  - Südzucker AG (Germany)
  - Südzucker Polska (Poland)
  - Südzucker Moldova (Moldova)
  - Raffinerie Tirlemontoise (Belgium)
  - Saint Louis Sucre (France)
- Südzucker AG wheat starch plant (Germany)
- Sales companies in Greece, Italy (sales joint venture Maxi S.r.l.), Spain and the United Kingdom
- Bodengesundheitsdienst
- Felix Koch Offenbach Couleur & Karamel GmbH



### AGRANA Sugar Division

- Sugar factories and refineries in Austria, Bosnia and Herzegovina, Czech Republic, Hungary, Romania, Slovakia
- AGRANA-Studen (Bosnia and Herzegovina)
- Beta Pura GmbH (Austria)



### Division Agriculture

- Farming operations in Germany, Poland and Moldova



## 6.2 Sugar segment: Figures

*Fiscal year 2022/23*

		2022/23	2021/22
<b>Revenues</b>	€ million	<b>3,216</b>	<b>2,623</b>
<b>EBITDA</b>	€ million	<b>381</b>	<b>133</b>
EBITDA margin	%	11.8	5.1
Depreciation	€ million	-151	-154
<b>Operating result</b>	€ million	<b>230</b>	<b>-21</b>
Operating margin	%	7.1	-0.8
Result from restructuring/special items	€ million	55	0
Result from companies consolidated at equity	€ million	18	-63
<b>Result from operations</b>	€ million	<b>303</b>	<b>-84</b>
Investments in fixed assets and intangible assets	€ million	144	114
Investments in financial assets/acquisitions	€ million	3	0
<b>Total investments</b>	€ million	<b>147</b>	<b>114</b>
Shares in companies consolidated at equity	€ million	29	21
Capital Employed	€ million	3,201	2,740
Return on Capital Employed	%	7.2	-0.7

## 6.3 Sugar segment: Beet campaign 2022/23

Sugar factories all over Europe



23  
2

Refineries

Total sugar production  
(including raw sugar refining)



3.7 million tonnes

Beet processing



23.3 million tonnes

Cultivated area



325,000 hectares

Beet processing / Sugar production

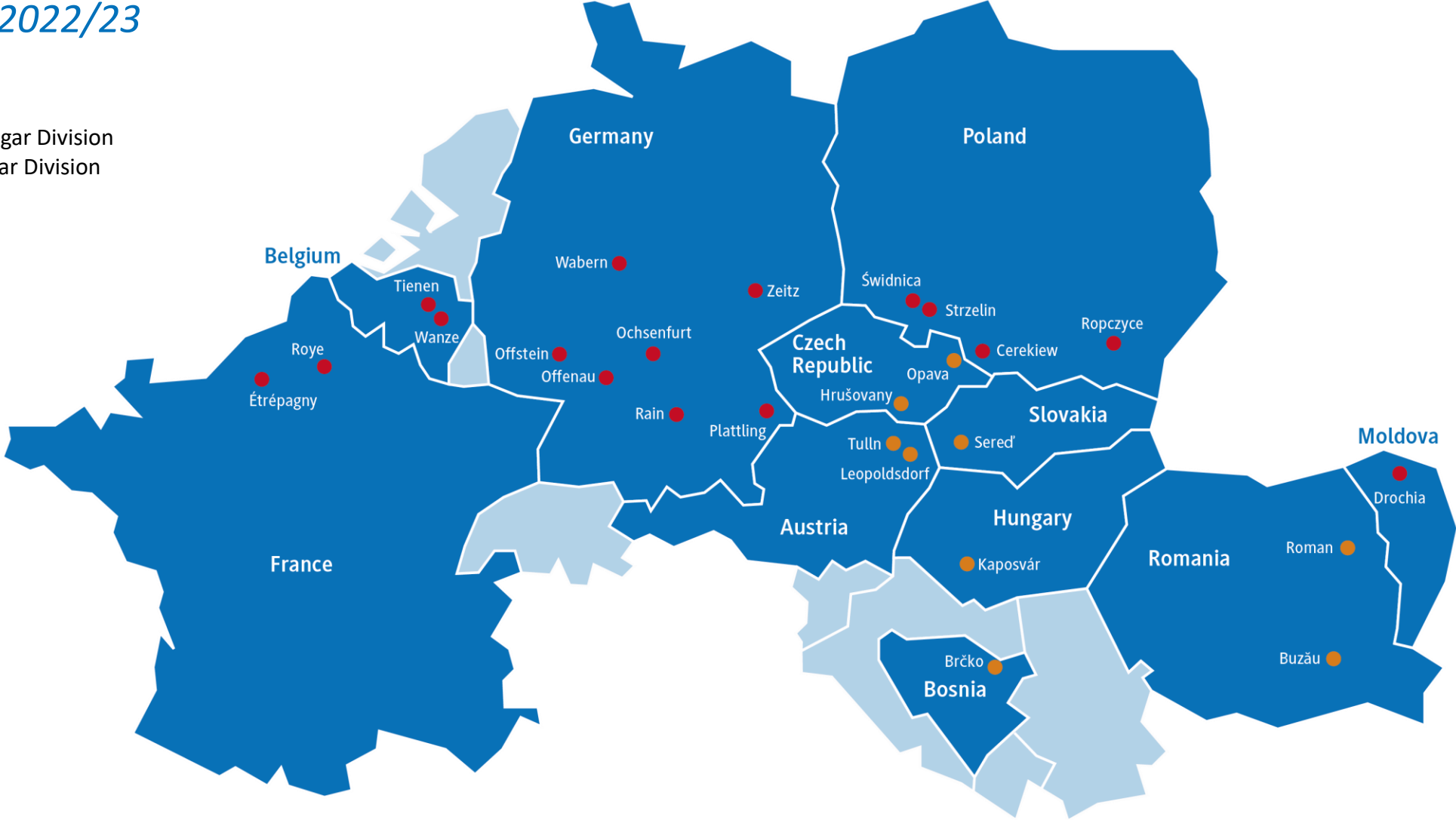


■ Sugar production (incl. raw sugar refining) ■ Beet processing

# 6.4 Sugar segment: Sites of the sugar factories / refineries

Campaign 2022/23

- Südzucker Sugar Division
- AGRANA Sugar Division





# 6.5 Südzucker AG

## Südzucker Sugar Division



Südzucker AG was founded in 1926.  
It operates 7 sugar factories in Germany.



### Assortment for households

- Feiner Rüben Zucker
- Feinster Zucker
- Feinster Back Zucker
- Puder Zucker
- Puder Zucker Mühle
- Hagel Zucker
- Brauner Zucker
- Bio Rüben Zucker
- Zucker Hut
- Kandissorten
- Zucker Sticks
- Sirup Zucker
- Würfel Zucker
- Glücks Zucker
- Gelier Rüben Zucker 1:1
- Gelier Rüben Zucker 2:1
- Gelier Rüben Zucker 3:1
- Einmach Zucker
- Brauner Rohrzucker
- Brauner Würfel Rohrzucker
- Rohrzucker Sticks
- Weisser Rohrzucker



Südzucker's **wheat starch plant** at the Zeitz site produces

- Glucose syrups
- Bran
- Gluten

for the food, animal feed and chemical industries.



## 6.6 Südzucker Polska

### Südzucker Sugar Division



Südzucker Polska produces beet sugar at four factories in Cerekiew, Ropczyce, Strzelin and Świdnica.

The Cukier Królewski brand has been known on the Polish market for over 20 years. Its high quality has been recognized with awards from customers as well as retail and industry specialists.

Cukier Królewski is proud of being the local brand and having a strong connection to the growers who supply their valuable raw material – the beets – to the factories.

Cukier Królewski is a socially responsible brand. As part of its sustainable development, it is taking action in the area of conscious consumption with its 'Bake, Process, Share' campaign.





# 6.7 Südzucker Moldova

Südzucker Sugar Division



Südzucker Group established a foothold in Moldova in the mid-90s and operates two sugar factories there\*.



\*Production stop at one plant since 2020/21.

## 6.8 Raffinerie Tirlemontoise

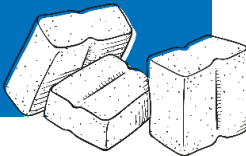
### Südzucker Sugar Division



Raffinerie Tirlemontoise opened its doors in 1836, making it the oldest factory of the Südzucker Sugar Division. It equals tradition: In 1905, the first "Harde Klontjes" were produced in Tirlemont, but it is also the birthplace of numerous other inventions and innovations.

Today, the company is still the market leader in Belgium. Consumers can find the products under two brands, Tiense Suiker – recognizable by the famous "T" logo – and Candico – known for its cassonade and candy sugar. In 2023, a new packaging for Tiense Suiker, focusing on the local sugar beet was launched.

Raffinerie Tirlemontoise operates sugar factories in Tirlemont and Wanze (Belgium) and produces sugar specialties in Antwerp and Oostkamp (Belgium) as well as in Wijchen (Netherlands).





## 6.9 Saint Louis Sucre

### *Südzucker Sugar Division*

SAINT LOUIS  SUCRE

In its two French factories, Saint Louis Sucre produces quality sugar for consumers as well as industrial and commercial customers.

Saint Louis is a famous sugar brand in France since 1865, bringing character and refinement to gourmet moments. Innovative and passionate, the Saint Louis brand is offering authentic beet and cane sugars in recyclable packaging.

Saint Louis Sucre employees are committed to the agro-ecological transition with their partners, the beet farmers. They share the same values and live them every day: commitment, respect and team performance.



# 6.10 Assortment for processing industries

*Südzucker Sugar Division*



## Crystal

- Organic beet sugar
- White sugar (also organic)
- Extra white sugar
- White sugar high-grade
- Pearl sugar
- Icing sugar (also organic) / Raftisnow®
- Candy sugar, candy powder
- Brown sugar
- Cane sugar (also organic & FairTrade)

## Liquid

- Liquid sugar (also organic)
- Invert sugar Syrup (also organic)
- Glucose syrup
- Glucose-Fructose Syrup
- Blends
- Caramels
- Candy Syrup

## Specialities

- Classic Fondants (partly organic & sugar reduced)
- Glazing
- Invert Sugar Paste
- Pharma Sugar / Excipients
  - Crystalline Sucrose
  - Liquid Sugar
  - COMPRI®



# 6.11 Co-products

*Südzucker Sugar Division*



## — Animal feed

- API bee feed
- Sugar beet molasses (also organic)
- Sugar beet pulp pellets (SBPP)
- Pressed sugar beet pulp
- Wheat bran pellets

## — Non-food/fermentation

- Sugar beet molasses
- Pressed sugar beet pulp
- Thick juice

## — Fertilizers

- Carbolime

# 6.12 Future-oriented solutions based on sugar beet

Südzucker Sugar Division

A wide range of sugar beet-based services and products tailored to customers' needs.



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## 6.13 Bodengesundheitsdienst



### BGD Bodengesundheitsdienst GmbH

- EUF soil testing for all important nutrients as well as humus for agriculture and private sector
- Mechanical, GPS-assisted soil sampling; support of site-specific fertilization
- Fertilizer advice and fertilizer requirement determination according to fertilizer ordinance
- Greenhouse gas accounting for agriculture
- Examination of organic fertilizers
- Animal feed testing
- Plant virus testing in plant vines, hops, etc. (ELISA, PCR)
- qPCR analyses of quarantine bacterial pests of seed potatoes and beet nematodes



## 6.14 AGRANA Sugar Division



The sugar division of AGRANA comprises 7 sugar beet factories and 2 raw sugar refineries.

- AGRANA Sales & Marketing GmbH as central sales platform with local implementation and customer support
- Wide range of products from conventional or organic farming for B2B, B2C (e.g., “Wiener Zucker”, “Koronas Cukor”, ...) and gastronomy

### Joint venture AGRANA-Studen-Group

- Responsible for trading, processing and distributing sugar and sweeteners in Eastern Europe

### Joint venture Beta Pura GmbH

- Production of crystalline betaine for the food, feed and cosmetics sectors





## 6.15 Farms



Since Südzucker was founded, the company has operated its own farms in Germany, and later also in Poland and Moldova, in the vicinity of the processing locations:

- Cultivation of wheat, sugar beets, corn, chicory, rapeseed and soybeans among others
- Partly organic farming of the areas (e.g., organic sugar beets) and organic turkey production
- Steady enhancement of modern farming methods and transfer of knowledge into practice
- Kirschgartshausen experimental farm: further development of sugar beet cultivation methods, biodiversity

# 7. SPECIAL PRODUCTS SEGMENT

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## 7.1 Special products segment: Overview



**beneo**  
connecting nutrition and health

- Plant-based ingredients with additional benefits for food, animal feed and pharmaceuticals
- 6 production sites worldwide



The Convenience Food Group  
**Freiberger**

- Deep-frozen and chilled pizza, as well as deep-frozen pasta dishes and snacks, sauces and dressings
- 10 production sites worldwide (6 in Europe, 4 in the USA)



**PORTIONPACK**  
GROUP

- Production and distribution of portion packs
- 8 production sites worldwide

## 7.2 Special products segment: Figures

*Fiscal year 2022/23*

		2022/23	2021/22
<b>Revenues</b>	€ million	<b>2,217</b>	<b>1,781</b>
<b>EBITDA</b>	€ million	<b>183</b>	<b>190</b>
EBITDA margin	%	8.2	10.7
Depreciation	€ million	-81	-73
<b>Operating result</b>	€ million	<b>102</b>	<b>117</b>
Operating margin	%	4.6	6.6
Result from restructuring/special items	€ million	-10	0
Result from companies consolidated at equity	€ million	0	0
<b>Result from operations</b>	€ million	<b>92</b>	<b>117</b>
Investments in fixed assets and intangible assets	€ million	145	124
Investments in financial assets/acquisitions	€ million	60	0
<b>Total investments</b>	€ million	<b>205</b>	<b>124</b>
Shares in companies consolidated at equity	€ million	0	0
Capital Employed	€ million	1,979	1,740
Return on Capital Employed	%	5.2	6.7

## 7.3 BENE0 – Connecting Nutrition & Health

*A contribution to better nutrition*



- BENE0 produces and markets functional ingredients from plant-based raw materials that have nutritional and technological benefits.
- Main market segments: food, animal feed, pharmaceutical products
- Additionally, BENE0 offers its customers extensive consulting in the areas of nutritional science and application technology to support the successful development of innovative foods.
- Sales offices in the United States, Asia, South America and Europe as well as a coordinated sales team in more than 80 countries for worldwide tailor-made customer support and a strong market position
- 6 production sites in Belgium, Chile, Germany, Italy and the Netherlands
- About 1,000 employees

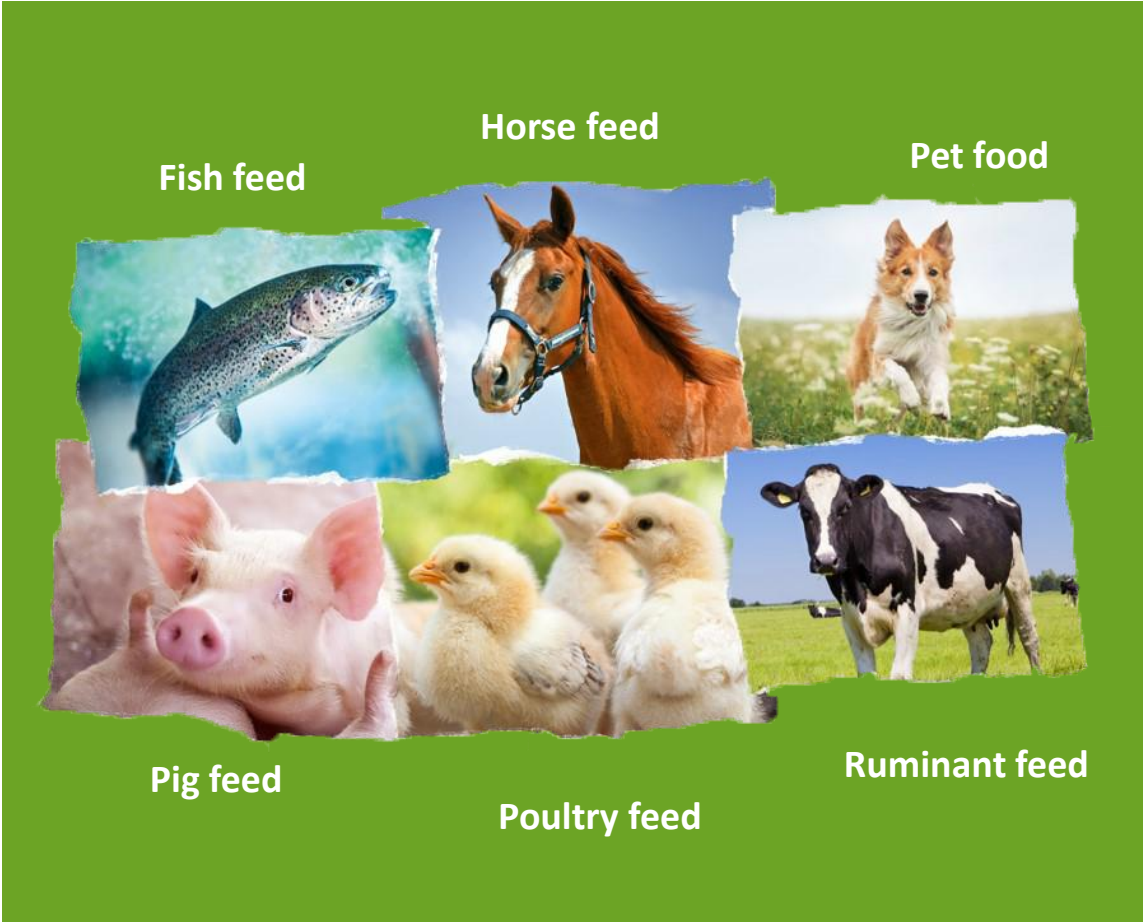


# 7.3.1 BENEQ: Application focus

## Human Nutrition







## Animal Nutrition





## 7.3.2 BENE0: Product portfolio and benefits

Products	Natural fibres: Inulin and Oligofructose	Functional carbohydrates	Rice starches, flours, proteins	Plant proteins
Natural Sources	Chicory root	Sugar beet	Rice	Wheat, Faba bean etc.
				
Benefits	<ul style="list-style-type: none"> <li>— Digestive health</li> <li>— Fibre enrichment</li> <li>— Better calcium absorption</li> <li>— Weight management</li> <li>— Fat and sugar replacement</li> <li>— Improved texture</li> <li>— Support of the body's immune system</li> </ul>	<ul style="list-style-type: none"> <li>— Toothfriendly</li> <li>— Weight management</li> <li>— Sugar/calorie reduction</li> <li>— Optimized sweetness and improved stability</li> <li>— Blood sugar management</li> <li>— Optimized energy</li> </ul>	<ul style="list-style-type: none"> <li>— Clean Label</li> <li>— Lactose-, gluten-free</li> <li>— Texture optimization</li> <li>— Optimized viscosity</li> <li>— Dairy and meat substitution</li> <li>— Hypoallergenic</li> </ul>	<ul style="list-style-type: none"> <li>— Milk and meat alternatives</li> <li>— Quality improvement</li> <li>— Texture optimization and stability</li> <li>— Neutral taste profile</li> </ul>

## 7.3.3 BENE0: More than ingredients with added benefits

- With expert services from R&D as well as the areas regulatory affairs and market intelligence, BENE0 supports its customers' successful product development and marketing.
- BENE0 offers solutions that provide answers to current consumer trends on the market.
- Research activities focus on nutritional science and application technology topics relevant to the food industry.
- Based on the research results, BENE0 was able to reach several positive evaluations by the European Food Safety Authority (EFSA).
- The BENE0 Institute, an initiative of BENE0, provides the expert knowledge for:
  - Gut health
  - Controlling blood sugar
  - Weight management
  - Dental health
  - Bone health
  - Physical performance



## 7.4 Freiberger (I)



- Freiberger Group is one of the three largest manufacturers of frozen and chilled pizza worldwide
- Production sites: Berlin, Muggensturm, Osterweddingen, Burg, Oberhofen/Austria, Westhoughton/Great Britain and 4 in the USA (in Wisconsin, Ohio and Illinois)
- 21 production lines in Europe, 9 in the USA; daily output of up to 4.5 million products
- Products: deep-frozen and chilled pizza as well as deep-frozen pasta dishes and snacks; sauces and dressings; products for bakery stations





## 7.4 Freiburger (II)

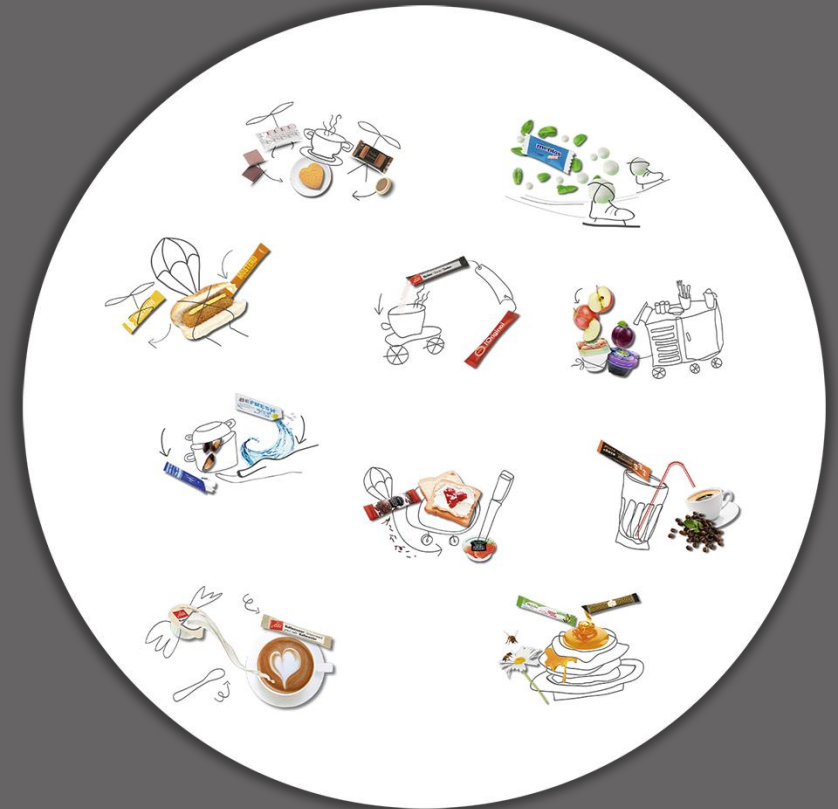
- Specialist for private labels, supplier of many leading food retailers in Europe and North America
- Further target markets: South Africa, Korea
- Brands: Alberto, al Forno, Pizzatainment
- Innovations 2022/23: Pinsa, premium pizza, microwave pizza snack



## 7.5 PortionPack



- Printing, packing and distribution of portion packed products
- Product range:
  - Food (sugar portions, toppings, pastries, snacks, sweets, etc.)
  - Non-food (shower gel, shampoo, refreshing towels, etc.)
- European market leader
- Major market: Gastronomy/large-scale consumers (hotels, catering, restaurants and canteens)
- Affiliates in 7 countries: Belgium, Czech Republic, Germany, Great Britain, Netherlands, South Africa and Spain



## 8. CROPENERGIES SEGMENT



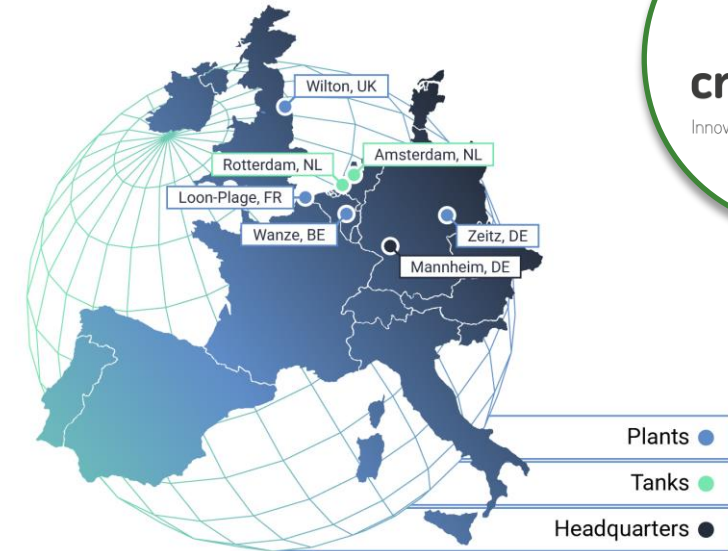
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## 8.1 CropEnergies segment: Overview

- The CropEnergies Group produces sustainable products from biomass
- The CropEnergies Group includes:
  - CropEnergies Bioethanol GmbH, Zeitz/Germany
  - BioWanze SA, Wanze/Belgium
  - Ryssen Alcools SAS, Loon-Plage/France
  - Ensus UK Ltd., Wilton/Great Britain
  - CT Biocarbonic, Zeitz/Germany (joint venture)
- 4 production sites in Belgium, France, Germany and Great Britain with an annual production capacity of about 1.3 million m<sup>3</sup> ethanol
- Construction of a plant for renewable ethyl acetate from sustainable ethanol at Zeitz Chemical and Industrial Park; start of operation: summer of 2025

### Sites



### Ethanol production 2022/23



**1,057** thousand m<sup>3</sup>

### Production of food and animal feed 2022/23



over **1** million tonnes

## 8.2 CropEnergies segment: Figures

*Fiscal year 2022/23*

		2022/23	2021/22
<b>Revenues</b>	€ million	<b>1,390</b>	<b>1,004</b>
<b>EBITDA</b>	€ million	<b>294</b>	<b>169</b>
EBITDA margin	%	21.1	16.8
Depreciation	€ million	-43	-42
<b>Operating result</b>	€ million	<b>251</b>	<b>127</b>
Operating margin	%	18.1	12.6
Result from restructuring/special items	€ million	0	0
Result from companies consolidated at equity	€ million	1	0
<b>Result from operations</b>	€ million	<b>252</b>	<b>127</b>
Investments in fixed assets and intangible assets	€ million	47	36
Investments in financial assets/acquisitions	€ million	4	0
<b>Total investments</b>	€ million	<b>51</b>	<b>36</b>
Shares in companies consolidated at equity	€ million	5	3
Capital Employed	€ million	535	486
Return on Capital Employed	%	46.9	26.1

## 8.3 CropEnergies Bioethanol GmbH

- One of Europe's biggest ethanol plants in Zeitz/Saxony-Anhalt
- Annual capacity:
  - about 400,000 m<sup>3</sup> ethanol, 60,000 m<sup>3</sup> can be refined to neutral alcohol
  - more than 300,000 tonnes ProtiGrain<sup>®</sup> (protein animal feed)
  - 100,000 tonnes liquefied CO<sub>2</sub>
- Renewable ethanol: mainly as additive to petrol in the form of E5 and E10
- High quality neutral alcohol e.g., for beverage, cosmetics and pharmaceutical industries
- ProtiGrain<sup>®</sup>: high protein animal feed distributed all over Europe
- Purification and liquefaction of CO<sub>2</sub> from fermentation, among others for the food sector
- Flexibility in processing raw materials (cereals and sugar syrup)





## 8.4 BioWanze SA

- Since December 2008, BioWanze operates a plant in Wanze/Belgium producing ethanol, gluten and ProtiWanze<sup>®</sup> (liquid protein animal feed), as well as liquefied CO<sub>2</sub> in cooperation with the SOL Group
- Raw materials: wheat and sugar syrups
- Annual capacity:
  - 300,000 m<sup>3</sup> ethanol
  - more than 400,000 tonnes ProtiWanze<sup>®</sup>
  - up to 60,000 tonnes gluten
  - 65,000 tonnes liquefied CO<sub>2</sub>
- Innovative production process: additional biomass power plant is scheduled to come on stream in 2023 and enable largely climate-neutral production



## 8.5 Ryssen Alcools SAS

- Production site in Loon-Plage/France
- Part of the CropEnergies Group since June 2008
- Annual capacity:
  - more than 100,000 m<sup>3</sup> ethanol for fuel applications
  - up to 90,000 m<sup>3</sup> ethanol for traditional and technical applications
- Specialized in flexible customer fulfilment in view of product specifications and delivery quantity
- Customers: fuel industry, beverage, cosmetic, pharmaceutical and chemical industries



## 8.6 Ensus UK Ltd.

- One of the largest ethanol plants in Europe in Wilton/Great Britain
- Member of CropEnergies Group since July 2013
- Production of ethanol and high-quality protein animal feed (DDGS)
- Annual capacity:
  - 400,000 m<sup>3</sup> ethanol
  - 350,000 tonnes DDGS
- Supply of a CO<sub>2</sub> liquefaction plant with an annual capacity of 250,000 tonnes for the production of food-grade CO<sub>2</sub>





## 8.7 CT Biocarbonic

- Joint venture to liquefy the CO<sub>2</sub> generated at the ethanol facility
  - Partner: SOL Gruppe
  - Largest biogenic CO<sub>2</sub> liquefaction plant in Germany
  - Site: Zeitz/Saxony-Anhalt
  - Start-up: end of 2010
- CO<sub>2</sub> marketing for use as carbonic acid in the food industry, as a cooling and freezing agent, and for the production of dry ice as a cleaning agent
- Production capacity: 100,000 tonnes of liquefied CO<sub>2</sub>/year
- Shares the existing ethanol plant's infrastructure, such as water/wastewater, energy, CO<sub>2</sub>



# 9. STARCH SEGMENT



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# 9.1 Starch segment: Overview



- 4 production sites in Austria and Romania, one 50% joint venture in Hungary
- Raw materials: potatoes, corn and wheat
- Starch and special starch products for the
  - Food and luxury food industries
  - Infant and child food industries
  - Paper and paper converting industries
  - Textile industry
  - Construction chemicals industry
  - Pharmaceutical and cosmetic industries
  - Bio-plastics industry
- One of the leading suppliers for business-to-business solutions in the organic sector
- Provider of products from special corn e.g., waxy corn and GMO-free corn
- Important supplier of environmentally friendly ethanol
- Next to ethanol, additional production of isoglucose in Hungary





## 9.2 Starch segment: Figures

*Fiscal year 2022/23*

		2022/23	2021/22
<b>Revenues</b>	€ million	<b>1,193</b>	<b>940</b>
<b>EBITDA</b>	€ million	<b>118</b>	<b>106</b>
EBITDA margin	%	9.9	11.2
Depreciation	€ million	-48	-49
<b>Operating result</b>	€ million	<b>70</b>	<b>57</b>
Operating margin	%	5.9	6.1
Result from restructuring/special items	€ million	0	0
Result from companies consolidated at equity	€ million	11	14
<b>Result from operations</b>	€ million	<b>81</b>	<b>71</b>
Investments in fixed assets and intangible assets	€ million	28	24
Investments in financial assets/acquisitions	€ million	0	0
<b>Total investments</b>	€ million	<b>28</b>	<b>24</b>
Shares in companies consolidated at equity	€ million	44	53
Capital Employed	€ million	552	488
Return on Capital Employed	%	12.7	11.7

# 10. FRUIT SEGMENT



## 10.1 Fruit segment: Overview

- Segment with a global reach and 40 production facilities
- Global market leader in fruit preparations (AGRANA Fruit)
- One of the most significant producers of fruit juice concentrate worldwide (AUSTRIA JUICE)
- Refining agricultural raw materials to high-value intermediate products for the food industry, above all for the drinks, dairy, bakery and ice cream industries
- Market presence on all five continents





## 10.2 Fruit segment: Figures

*Fiscal year 2022/23*

		2022/23	2021/22
<b>Revenues</b>	€ million	<b>1,482</b>	<b>1,251</b>
<b>EBITDA</b>	€ million	<b>94</b>	<b>94</b>
EBITDA margin	%	6.4	7.5
Depreciation	€ million	-43	-42
<b>Operating result</b>	€ million	<b>51</b>	<b>52</b>
Operating margin	%	3.5	4.1
Result from restructuring/special items	€ million	-48	-42
Result from companies consolidated at equity	€ million	0	0
<b>Result from operations</b>	€ million	<b>3</b>	<b>10</b>
Investments in fixed assets and intangible assets	€ million	36	34
Investments in financial assets/acquisitions	€ million	0	4
<b>Total investments</b>	€ million	<b>36</b>	<b>38</b>
Shares in companies consolidated at equity	€ million	0	0
Capital Employed	€ million	828	870
Return on Capital Employed	%	6.2	6.0

## 10.3 Fruit preparations

### AGRANA Fruit



- Producer of fruit preparations, brown flavors, inclusions and savory preparations
- World market leader in fruit preparations
- 1,400 new product launches per year
- 26 production sites worldwide
- Bundling of all operating business activities in the company AGRANA Fruit S.A.S., Mitry-Mory/France
- Production plants next door to industrial customers to ensure freshness and high quality
- Research center for fruit preparations in Tulln/Austria and “Innovation Hubs” in 21 countries
- Conception and production of fruit preparations in close cooperation with customers (mainly international groups from the dairy, ice cream and bakery industries as well as food service companies) in research and development

## 10.4 Fruit juice concentrates

### AUSTRIA JUICE

**AUSTRIA  
JUICE**

- Production and business-to-business distribution of high-quality apple juice and berry juice concentrates, flavors, fruit wines, direct juices and customized food & beverage solutions
- Global market presence: 14 production sites worldwide; exports to more than 750 customers in 65 countries worldwide
- Direct access to global raw materials and focus on a holistic value chain
- International team of experts at the research and development center
- Bundling of all operational business activities in the company AUSTRIA JUICE GmbH, Kröllendorf/Austria





# 11. RESEARCH & DEVELOPMENT

# 11. Research & development (I)

## *Main focus*

- Development of new products and product variants
- Examination of cooperation opportunities with start-ups
- Application technology in the food and non-food areas
- Development and optimization of production processes
- Testing of new process technologies
- Evaluation and monitoring of key equipment
- Support of the sales and production departments



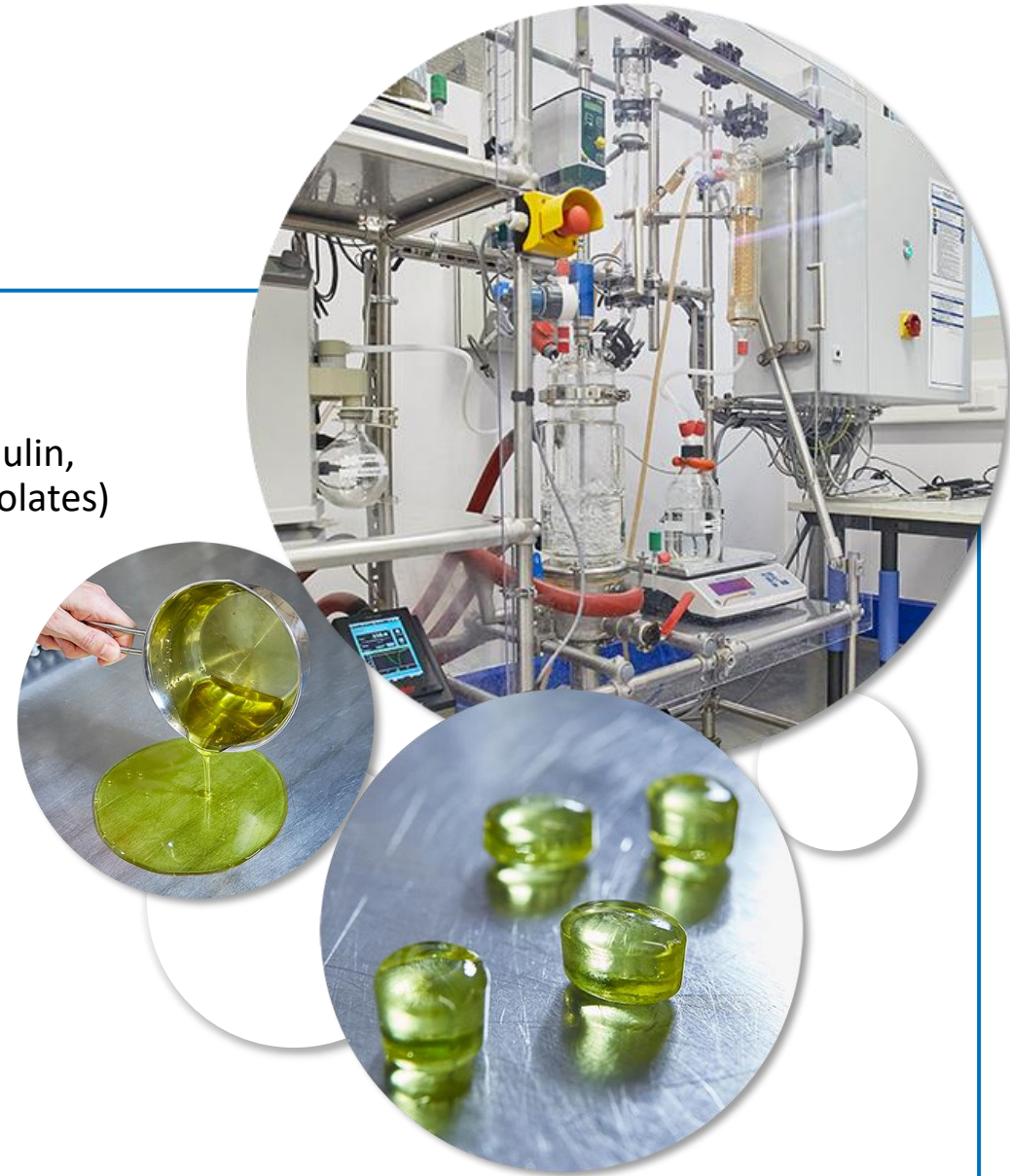


# 11. Research & development (II)

## Facts & Figures

### — Assignments:

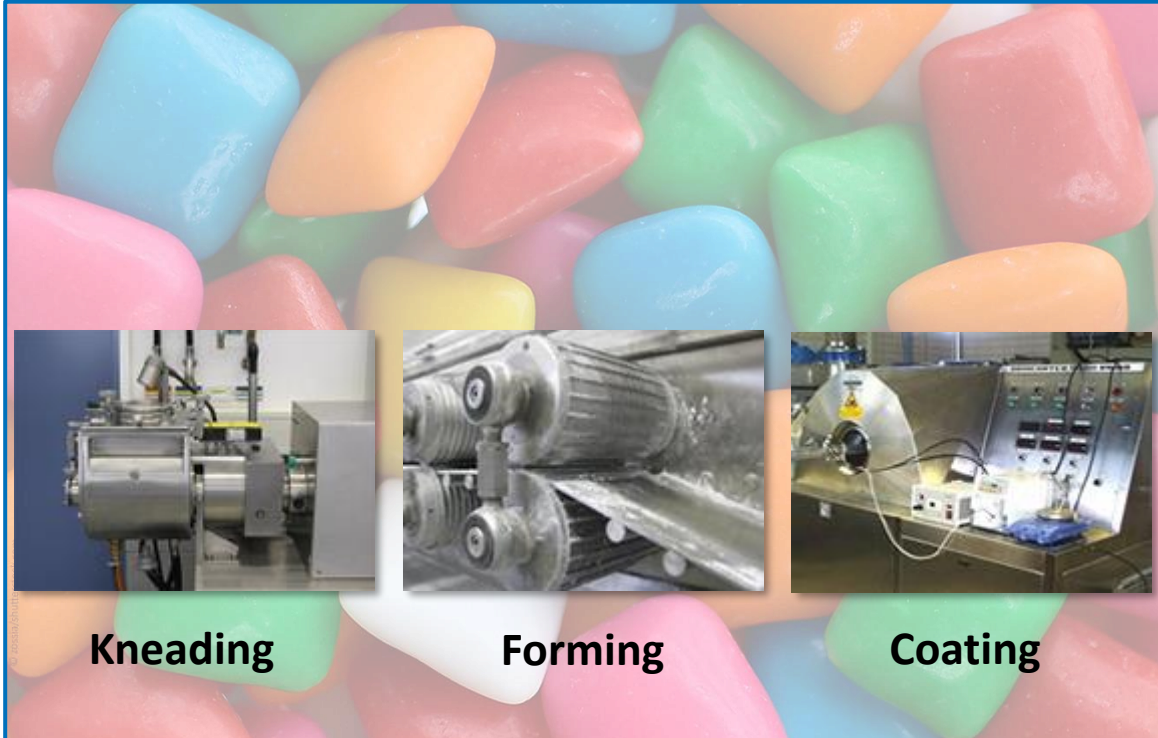
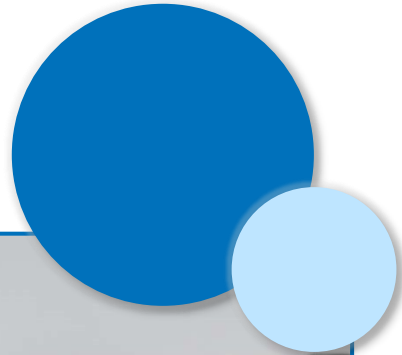
- Sugar technology and sugar specialties
  - Functional food ingredients (Isomalt, Palatinose™, rice derivatives, inulin, oligofructose, dietary fibers, plant-based protein concentrates and isolates)
  - Pharmaceutical additives
  - Starch and starch derivatives
  - Fruit preparations
  - Fruit juice concentrates
  - Renewable ethanol
  - Fibres
  - Bio-based chemicals
  - Biodegradable plastics
- Expenditure for R&D in 2022/23: € 58.2 million
- 534 employees worldwide





# 11. Research & development (III)

*Application technology and infrastructure in the field of confectionery*



**Kneading**

**Forming**

**Coating**

**Production of chewing gum and coated products in the "Chewing gum Lab" in Offstein/Germany**



**Production of chocolate samples with Südzucker ingredients in the "Choco Lab" in Tienen/Belgium**

# 11. Research & development (IV)

*Product development in the areas of baked goods and meat alternatives*



**Production of bakery products (bread, biscuits, waffles, cakes) for application technology evaluations in Tienen/Belgium**



**Production of textured proteins in the pilot extruder for meat substitute products in Offstein/Germany**



# 11. Research & development (V)

*Product development in the areas of dairy-based and plant-based alternatives*



**Production of dairy-based and plant-based alternatives (vegan) for application technology evaluations in Tienen/Belgium.**

Examples of dairy- and plant-based product development:

- Beverages
- Yogurt & fermented products
- Desserts & frozen desserts
- Cream cheese





## 12. SÜDZUCKER HISTORY



© Südzucker

# 12. Südzucker history (I)

More than 175 years of tradition

1837 Formation of the first sugar company of the later Südzucker



1926 1st merger: Süddeutsche Zucker-Aktiengesellschaft, Mannheim/Germany

1951 Formation of Zuckerfabrik Franken GmbH, Germany

1988 2nd merger: Südzucker Aktiengesellschaft Mannheim/Ochsenfurt

1989 Investment in AGRANA Beteiligungs-AG, Vienna/Austria

1989 Investment in Raffinerie Tirlemontoise S.A., Brussels/Belgium

1991 Formation of Südzucker GmbH, Zeitz/Germany

1995 Formation of Schöller Holding GmbH & Co. KG, Nuremberg/Germany

1996 Acquisition of majority interest in Freiberger, Berlin/Germany

1996 Beginning investments in sugar division in Poland

1998 Acquisition of outstanding minority interests in Freiberger



## 12. Südzucker history (II)

*More than 175 years of tradition*

2001	Acquisition of Saint Louis Sucre S.A., Paris/France; Sale of Schöller Holding
2003	Acquisition of 14 Silesian sugar factories
2003	Establishment of fruit division by AGRANA
2004	Worldwide expansion of fruit division
2005	Start of ethanol production in Zeitz/Germany
2006	BENEO-Orafti factory in Chile starts production
2006	IPO for the Südzucker subsidiary CropEnergies (ethanol) and European-wide expansion of the ethanol division
2006	First joint venture with a leading apple juice concentrate producer in China
2007	Fruit preparations factory in Brazil starts production
2007	BENEO Group founded: Orafti, Palatinit and Remy functional food activities merged
2008	Ethanol plant in Wanze/Belgium with an annual capacity of 300,000 m <sup>3</sup> starts production
2008	Ethanol plant in Pischelsdorf/Austria with an annual capacity of 240,000 m <sup>3</sup> starts production
2009	Freiberger takes over the pizza production site in Osterweddingen/Germany
2010	New pizza factory starts up in Westhoughton/Great Britain

SAINT LOUIS  SUCRE

**beneo**  
connecting nutrition and health

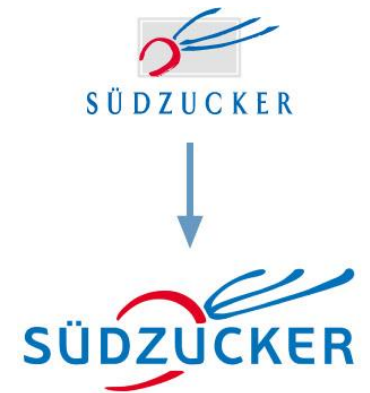


## 12. Südzucker history (III)

*More than 175 years of tradition*

2010	CO <sub>2</sub> production facility starts up in Zeitz/Germany (joint venture)
2012	Joint venture AUSTRIA JUICE GmbH
2012	CropEnergies builds a facility at the Zeitz site which will produce high-end food-grade rectified spirit
2013	CropEnergies acquires UK ethanol producer Ensus
2013	AGRANA opens wheat starch plant at site in Pischelsdorf/Austria
2014	Südzucker and Austrian shareholders increase participation in AGRANA Beteiligungs-AG
2014	AGRANA starts up fruit preparations plant in Lysander, New York/USA
2014	Introduction of new logo
2015	Change of the company's name to Südzucker AG
2015	Completion of renovation and new construction of headquarters in Mannheim/Germany
2016	Wheat starch factory in Zeitz starts operations
2016	AGRANA acquires Argentinian fruit preparations producer MAIN PROCESS S.A.
2017	Freiberger acquires German frozen pizza producer HASA GmbH
2017	AGRANA acquires fruit processing plant in India

**AUSTRIA  
JUICE**



## 12. Südzucker history (IV)

*More than 175 years of tradition*

2017	Freiberger acquires U.S. frozen and deli pizza producer Richelieu
2018	AGRANA acquires stake in Algerian fruit preparations producer Elafruits SPA
2018	PortionPack acquires British single portion items producer CustomPack Ltd.
2018	AGRANA signs joint venture agreement with US sugar producer The Amalgamated Sugar Company
2019	AGRANA opens new fruit preparations plant in Changzhou/China
2019	BENEO opens production plant for vegetal protein in Wanze/Belgium
2019	AGRANA: ground-breaking ceremony for betaine plant at Tulln/Austria
2019	AGRANA opens second wheat starch plant in Pischelsdorf/Austria
2020	PortionPack: Single Source and Custom Pack becomes Portion Solutions
2020	AGRANA starts production of crystalline betaine in Tulln/Austria
2020	Südzucker launches strategy project 2026 PLUS
2021	AGRANA starts fruit preparations production in Japan
2021	CropEnergies presents new corporate design and logo
2021	Adjustment of Südzucker Group's segment structure, new starch segment



## 12. Südzucker history (V)

*More than 175 years of tradition*

2021	BENEO invests in capacity expansions in Pemuco/Chile and Oreye
2022	BENEO invests in a plant for processing pulses at the Offstein site in Germany
2022	BENEO acquires the Dutch company Meatless B.V.
2022	CropEnergies acquires stake in Brandenburg-based biotech start-up LXP Group GmbH
2022	PortionPack acquires Orange Nutritionals Group B.V., Zaandam/Netherlands
2022	CropEnergies acquires stake in renewable energy start-up East Energy GmbH, Rostock/Germany
2022	CropEnergies acquires stake in Syclus B.V., a Dutch start-up for biobased chemicals
2022	CropEnergies invests in a plant for renewable ethyl acetate in Zeitz/Germany



# 13. SUGAR MARKET



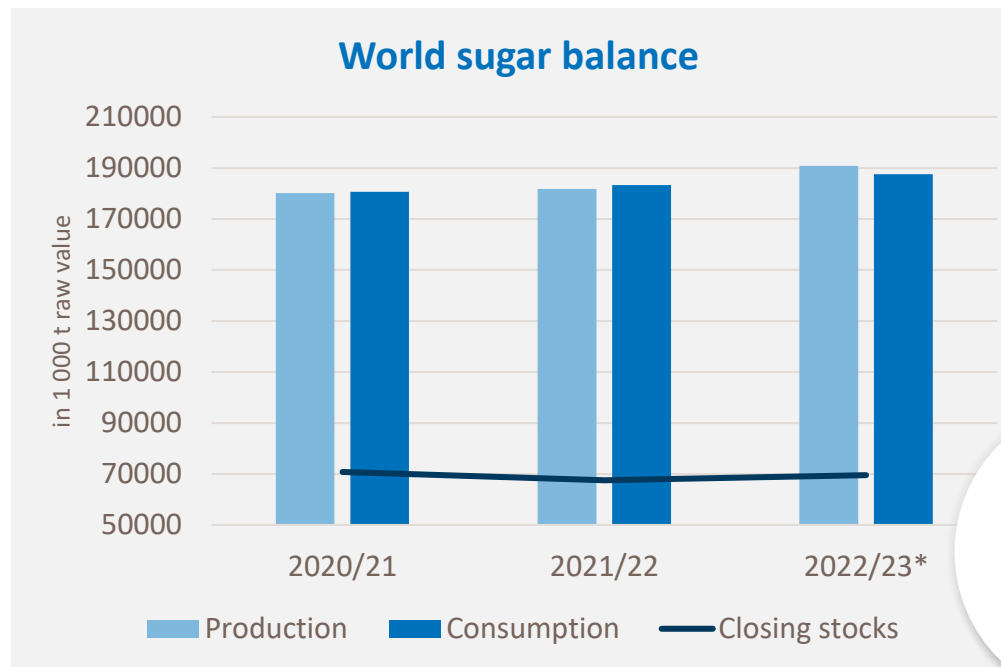
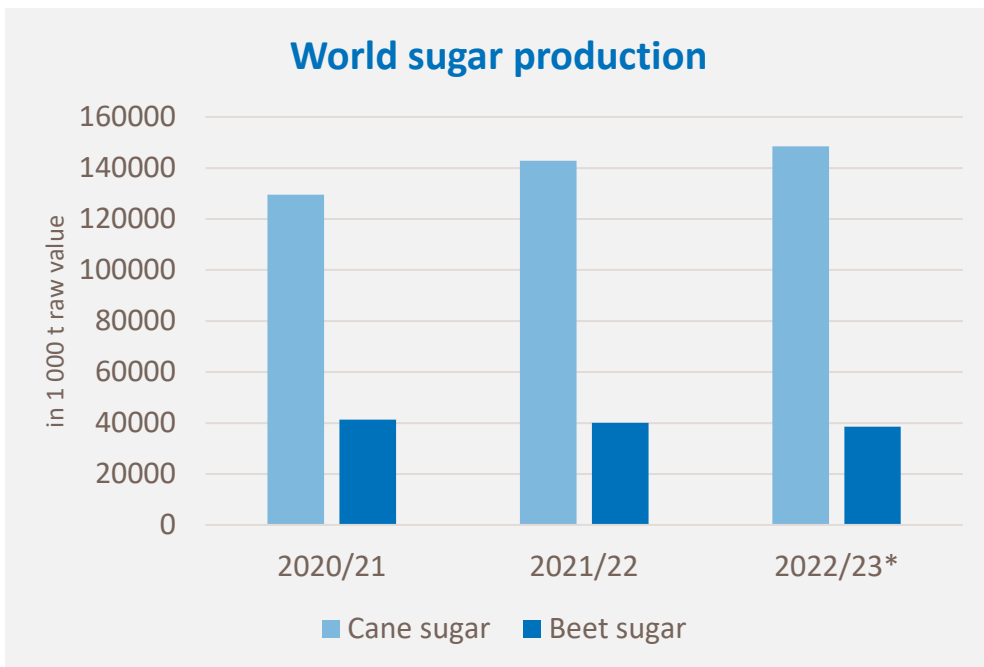
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# 13.1 Sugar Market - Germany & World

## Germany

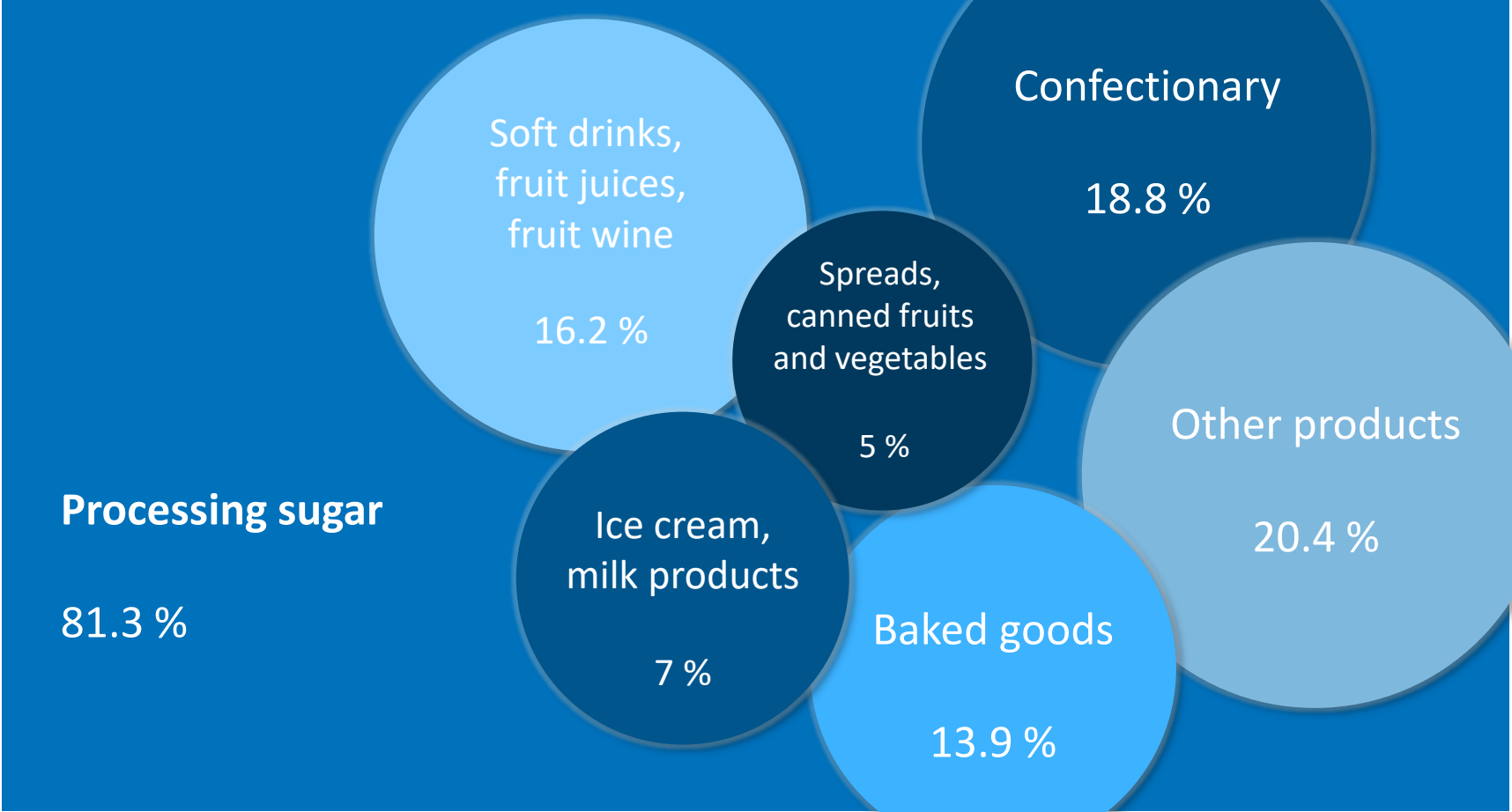
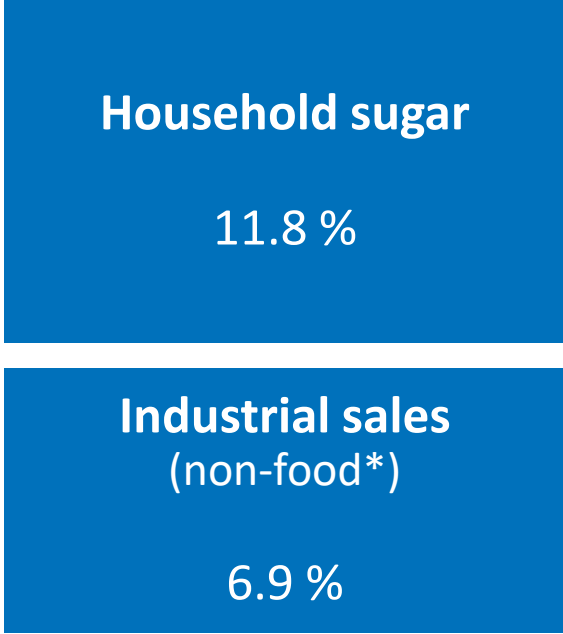
		2022/23	2021/22
Sugar factories		18	18
Beet growers		22,302	22,822
Area under beet cultivation	hectares	360,691	355,164
Sugar production	million tonnes	3.86	4.55
Domestic sugar sales	million tonnes	3.1*	2.9**

Sources: WVZ/BLE.  
\*2021/22; \*\*2020/21



Source: S&P Global (as of December 2022/February 2023; \*preliminary)

# 13.2 German sugar sales



\* e.g., alcohol production, chemical and pharmaceutical products

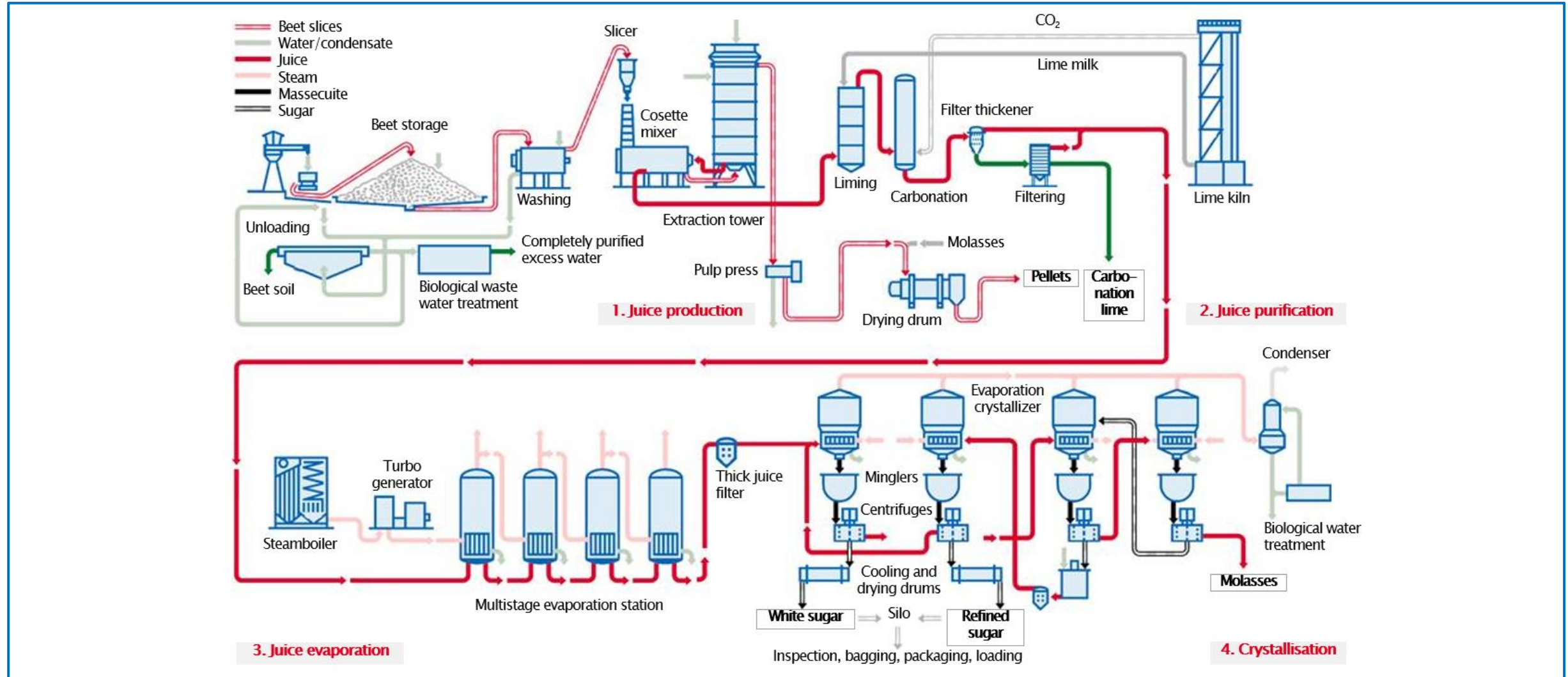
Source: BLE, Data 2021/22



# 14. SUGAR PRODUCTION

# 14. Sugar production

## Scheme of operation of a beet sugar factory





# Links

## SÜDZUCKER GROUP



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[facebook.com/suedzuckerkarriere](https://facebook.com/suedzuckerkarriere)  
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## SUGAR SEGMENT



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[sucre-saintlouis.com](https://sucre-saintlouis.com)



[agrana.com](https://agrana.com)  
[wiener-zucker.at](https://wiener-zucker.at)



[bodengesundheitsdienst.de](https://bodengesundheitsdienst.de)



[bisz.suedzucker.de](https://bisz.suedzucker.de)

## SPECIAL PRODUCTS SEGMENT



[beneo.com](https://beneo.com)



[freiberger-pizza.com](https://freiberger-pizza.com)



[portionpack.group](https://portionpack.group)

## CROPENERGIES SEGMENT



[cropenergies.com](https://cropenergies.com)  
[biowanze.be](https://biowanze.be)  
[ryssen.com](https://ryssen.com)  
[ensus.co.uk](https://ensus.co.uk)

## STARCH SEGMENT



[agrana.com](https://agrana.com)

## FRUIT SEGMENT



AUSTRIA  
JUICE

[agrana.com](https://agrana.com)  
[austriajuice.com](https://austriajuice.com)

## INITIATIVES



[schmecktrichtig.de](https://schmecktrichtig.de)



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