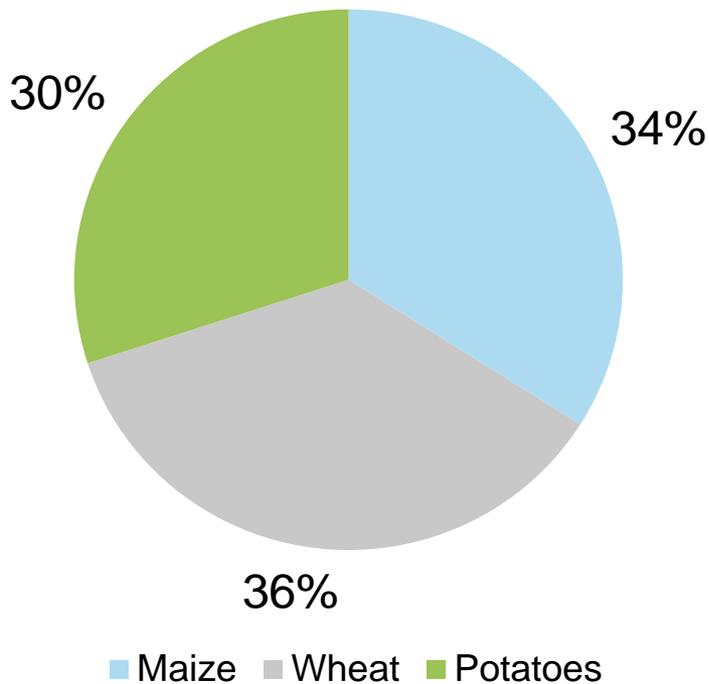


STARCH EUROPE

CDG Sugar & Starch Sectors

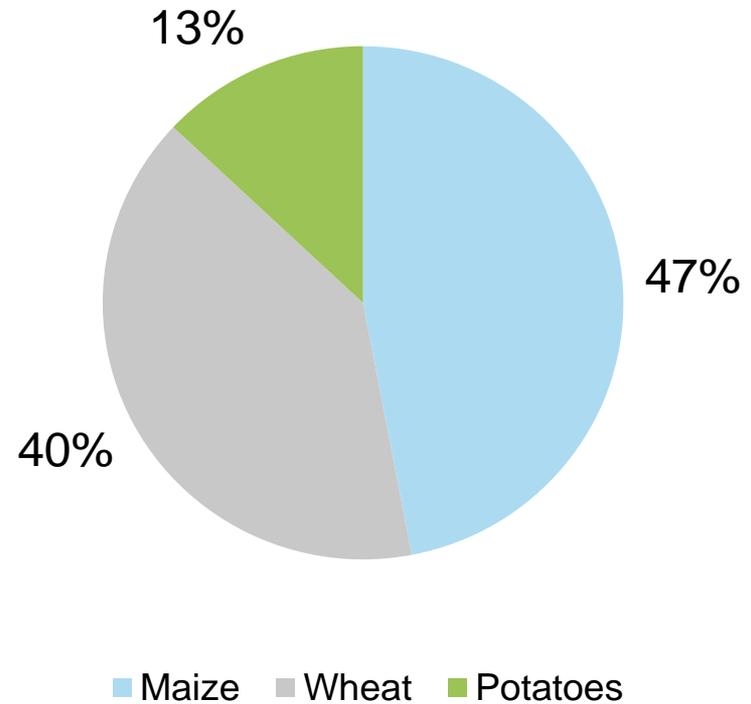
Main Production in EU (2017)

Processed Raw Material



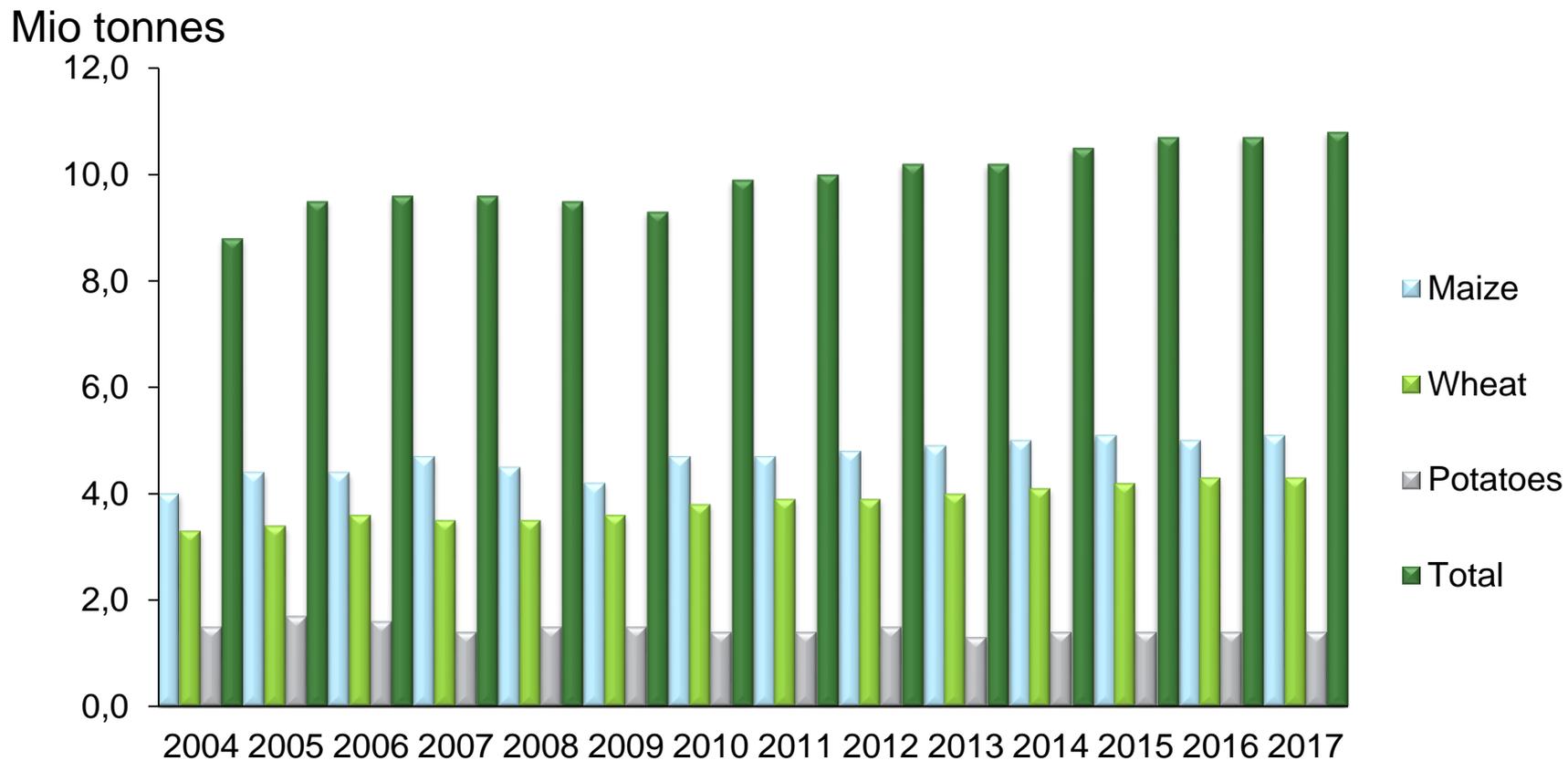
Total: 23,8 mio tonnes

Starch Products in Starch Equivalent



Total: 10,8 mio tonnes

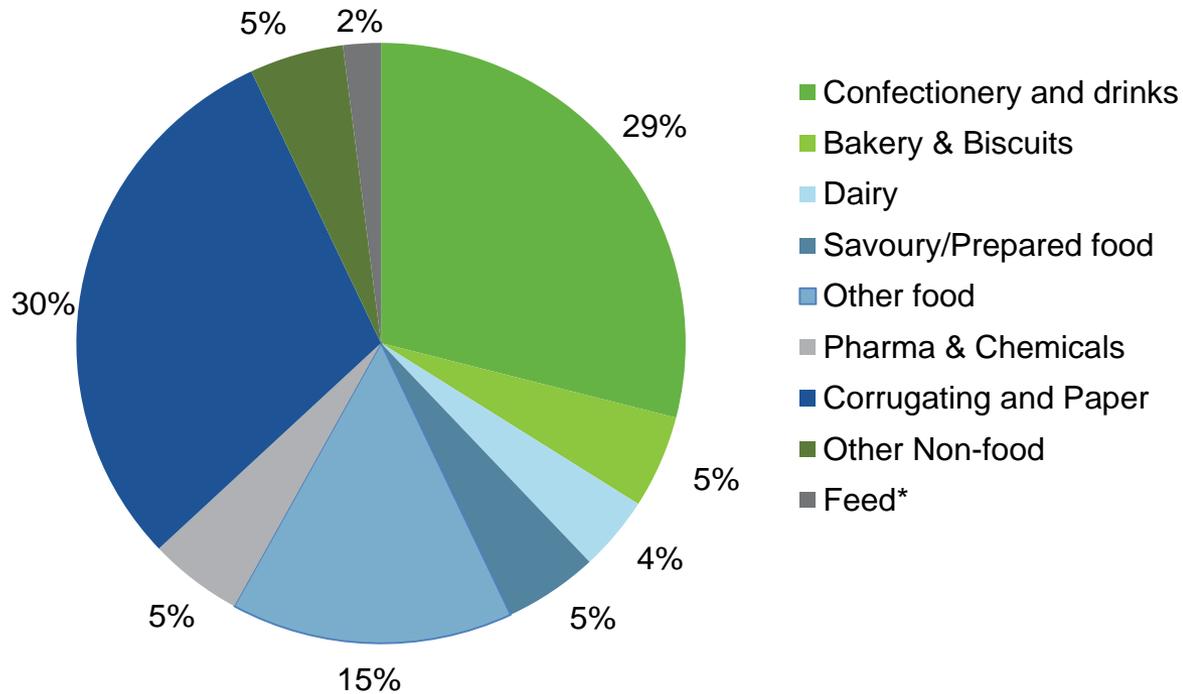
Starch Production in the EU



EU 25 FROM
2004

EU 27 FROM
2007

Main starch applications - 2017



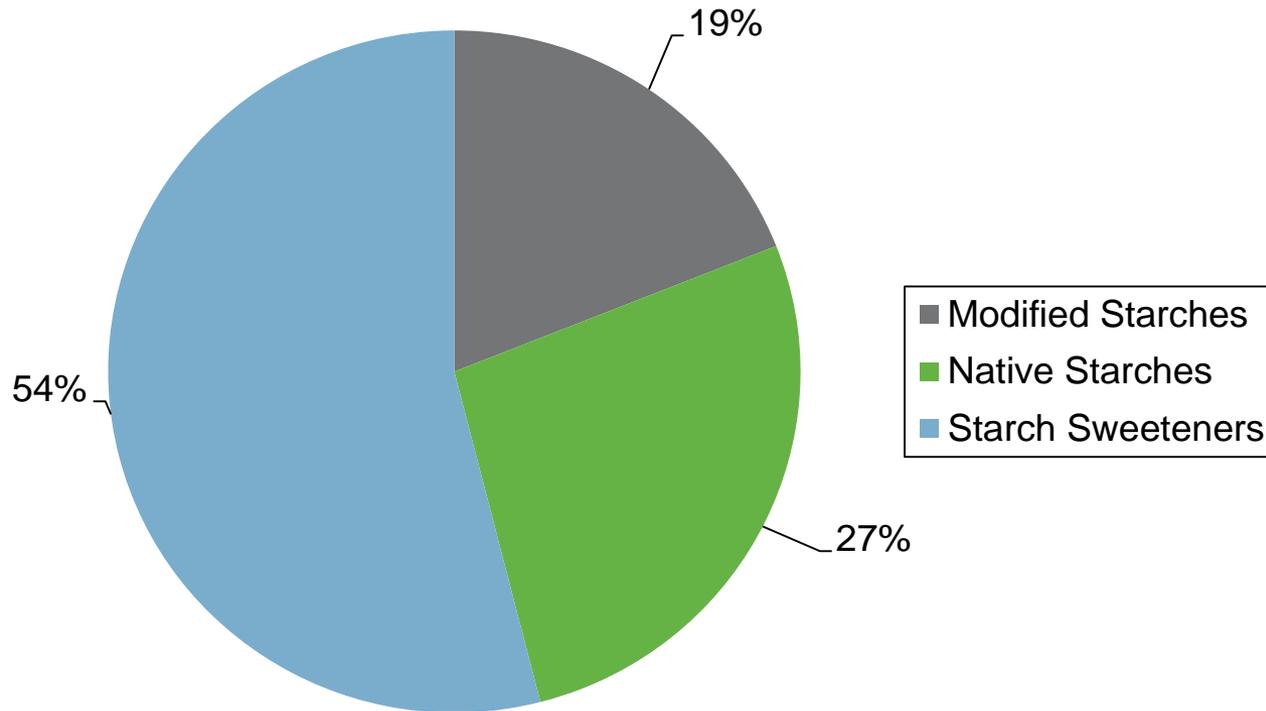
Total Market: 9,4 mio tonnes

* Excluding co-products amounting to about 5 million tonnes

Source: industry statistics compiled and audited by PriceWaterhouseCoopers



EU consumption of starch & starch derivatives - 2017



Total Market: 9,4 mio tonnes

| SALES TO EU CUSTOMERS | January – June 2017 (in thousand tonnes) | January – June 2018 (in thousand tonnes) | % change |
|---------------------------|---|---|----------|
| Isoglucose > 41% fructose | 339 | 295 | -13% |
| Of which isoglucose F42 | 187 | 173 | -8% |
| Of which isoglucose F55 | 138 | 105 | -24% |



Anti-dumping duties on EU exports to China of potato starch

February 2006

- Launch of the anti-dumping investigation on imports of potato starch from the EU into China

February 2012

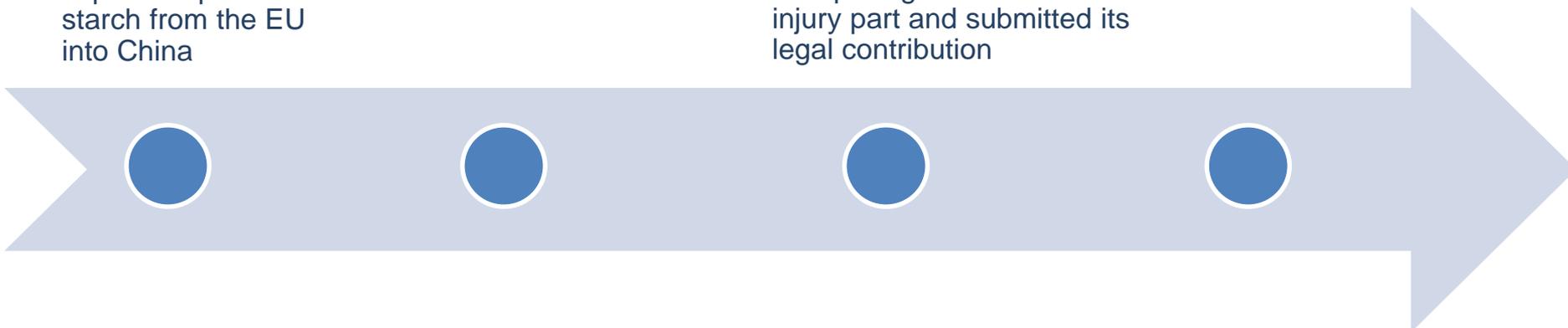
- Sunset review launched by the MOFCOM: duty was extended

February 2018

- MOFCOM launched the **expiry review** of the anti-dumping duties: Starch Europe registered as an injury part and submitted its legal contribution

February 2019

- MOFCOM decision to be notified



Duties applied: - 12,6% for Avebe and
- 56,7% for all the others companies

Anti-subsidy duties on EU exports to China of potato starch

May 2010

- Launch of the anti-subsidy procedure by the MOFCOM

August 2011

- Notification on final margins applying to EU potato starch imported into China

September 2017

- On 21 September 2017 the MOFCOM notified the extension of the anti-subsidy duties for another 5 years, i.e. until September 2022.



Duties applied: - 7.5% for Roquette and
- 12.4% for all the others companies

Starch Europe assessment

- EU import of potato starch in China do not prevent the development of the domestic potato starch industry:
 - A growing Chinese potato starch industry (30% growth between 2013 and 2016)
 - Diversified EU outlet markets: at 30 000 T p.a. China = 9% of EU potato starch exports
- Structural factors other than alleged dumped imports are responsible for the alleged injury:
 - EU and Chinese potato starch industries rely on different raw materials, impacting profitability
 - China can increase use of domestic production capacity to meet demand

Product Reputation 2018-2019



WHAT WE HAVE DONE

- Set up of Twitter account (May 2018)
- Regular activity: 176 tweets posted (incl. RTs)



WHAT WE WILL DO

- Twice-weekly posts on industry and products – informative/educational content
- Promotion of StarchinFood.eu
- Two thematic campaigns
- Promoted tweets (paid) with defined “Action”



STARCH EUROPE

| Tweets | Following | Followers | Likes | Lists | Moments |
|--------|-----------|-----------|-------|-------|---------|
| 176 | 251 | 167 | 232 | 0 | 0 |

Starch Europe
@StarchEurope

Starch Europe is the trade association representing the European #starch industry both at EU and International level. #Europe starch.eu

Brussels, Belgium
starchinfood.eu
Joined May 2018
60 Photos and videos

Tweets Tweets & replies Media

Pinned Tweet

Starch Europe @StarchEurope · Jul 25
Want to know more about the starch-based ingredients used in food? What products are they, why are they used? Visit starchinfood.eu to find answers to any questions you might have. If its not already posted there, simply ask. #starch #theindispensibleingredient

STARCH IN FOOD: YOUR QUESTIONS ANSWERED ASK YOUR QUESTION HERE

| Starch | New ingredients are made | Watermarks | Modified starch | Resistant | Sugars and sweeteners |
|--|----------------------------|--------------------|------------------------------|---------------------------|-----------------------|
| IS THERE ANY LIMITATION ON THE USE OF ISOLUCULOSE/PPCS IN THE FOOD INDUSTRY? | DOES STARCH CONTAIN FIBRE? | WHAT IS MAIZE OIL? | IS STARCH ONLY USED IN FOOD? | WHAT IS RESISTANT STARCH? | |

Product Reputation 2018-2019



WHAT WE HAVE DONE

- Regular activity, promoting Starch in Food, Starch Europe Conference, etc

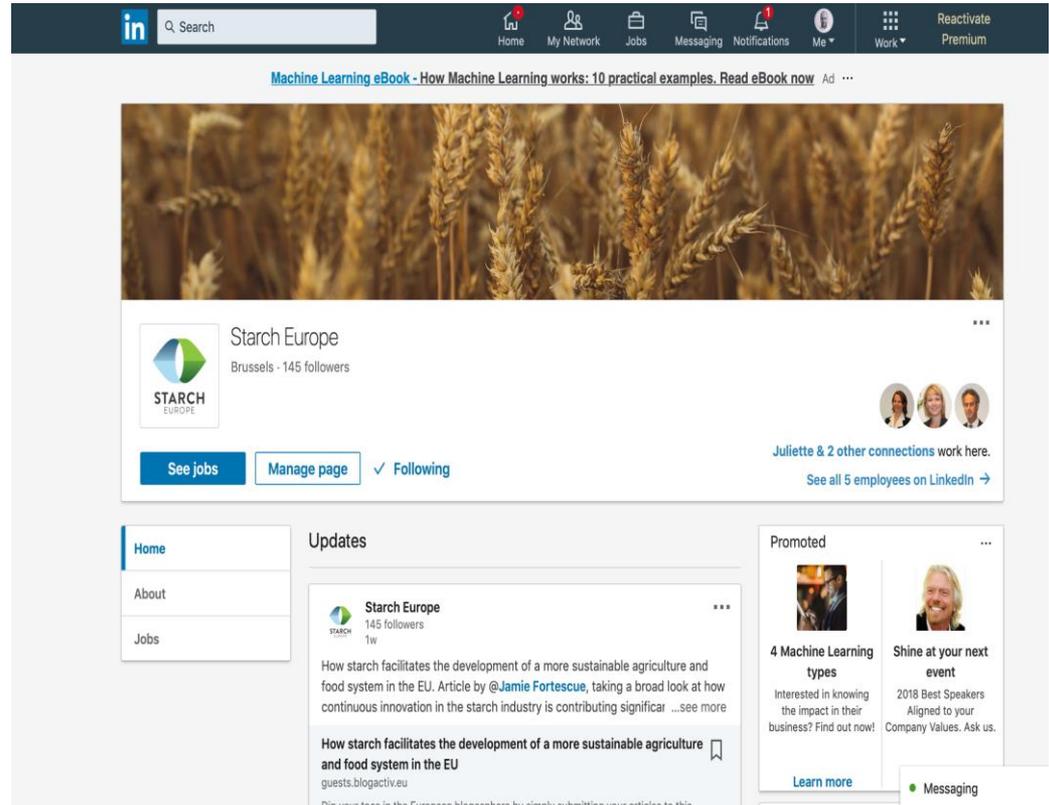


145
Followers

65 (↑54%)
PageViews
(last 30 days, compared to previous 30 days)

WHAT WE WILL DO

- Twice-monthly posts on industry and products
- Promotion of StarchinFood.eu
- Promoted Posts (paid) with defined “Action” surrounding launch of new Starch In Food



The screenshot shows the LinkedIn profile for Starch Europe, located in Brussels with 145 followers. The page is set to 'Following'. A recent update from Starch Europe (posted 2 weeks ago) features a post titled 'How starch facilitates the development of a more sustainable agriculture and food system in the EU'. The post includes a link to an article by @Jamie Fortescue and a 'Learn more' button. To the right, there is a 'Promoted' section with two ads: '4 Machine Learning types' and 'Shine at your next event'.

Product Reputation 2018-2019

WHAT WE HAVE DONE

- New content posting (Q&As)
- Frequent Promotion on Social Media



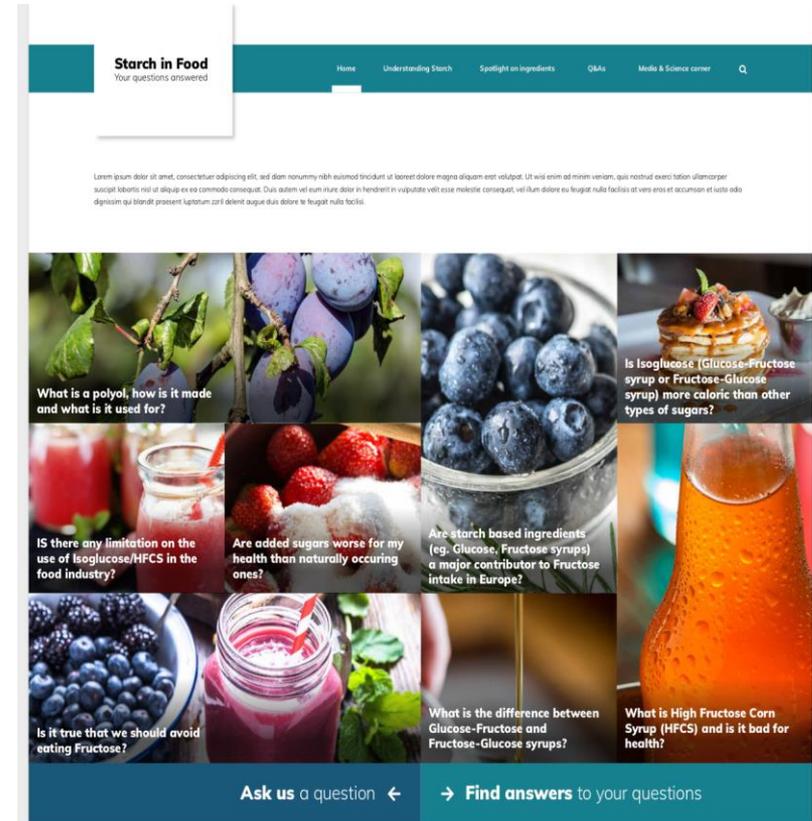
>800 Visits
October 2018

↑50%
(vs Oct 2017)

WHAT WE WILL DO

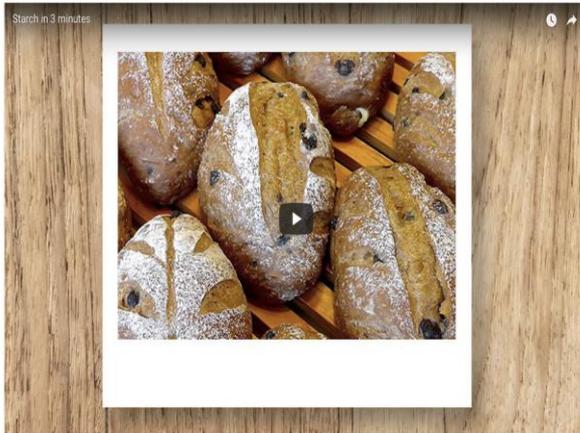
- Redevelopment currently being finalised
 - Broader content
 - Deeper content
 - Science Library/Corner
- Regular posting of material
- Sustained Social Media Promotion (Paid promotion on Social Media)

www.starchinfood.eu (mock-up)



Product Reputation 2018-2019

OTHER ACTIVITIES



- Creation of new general product reputation material
 - “What is Starch?” presentation created in 2018
 - 2 New Brochures in 2019: Dextrose and Proteins
- Media Briefings and Site Visits

A.O.B

- Autonomous Tariff Suspension: Request on Dextrose (CN 1702 30 50)



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