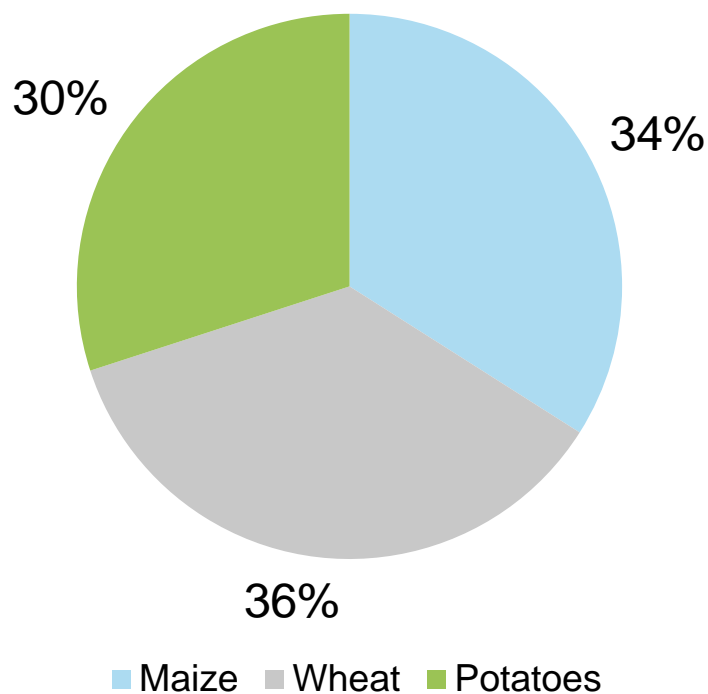


STARCH EUROPE

CDG Sugar & Starch Sectors

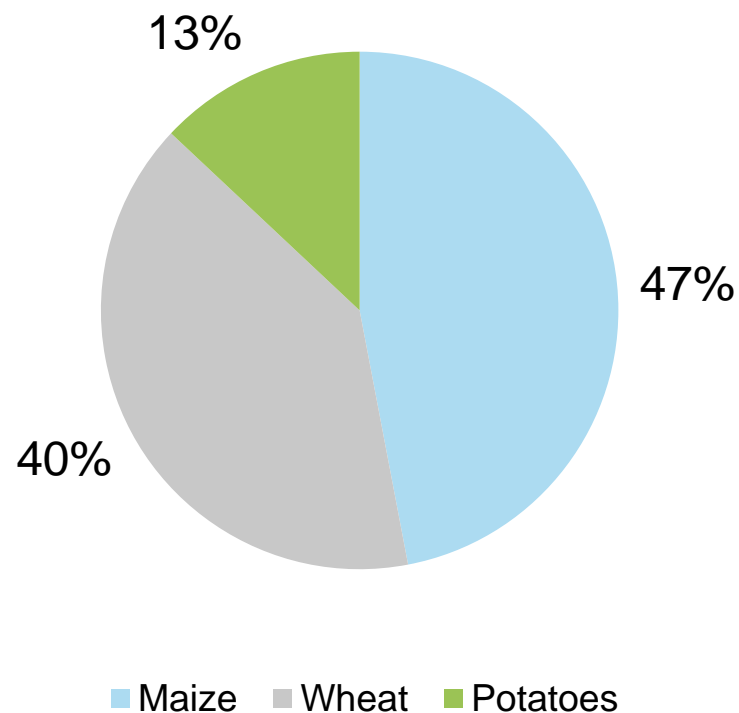
Main Production in EU (2017)

Processed Raw Material



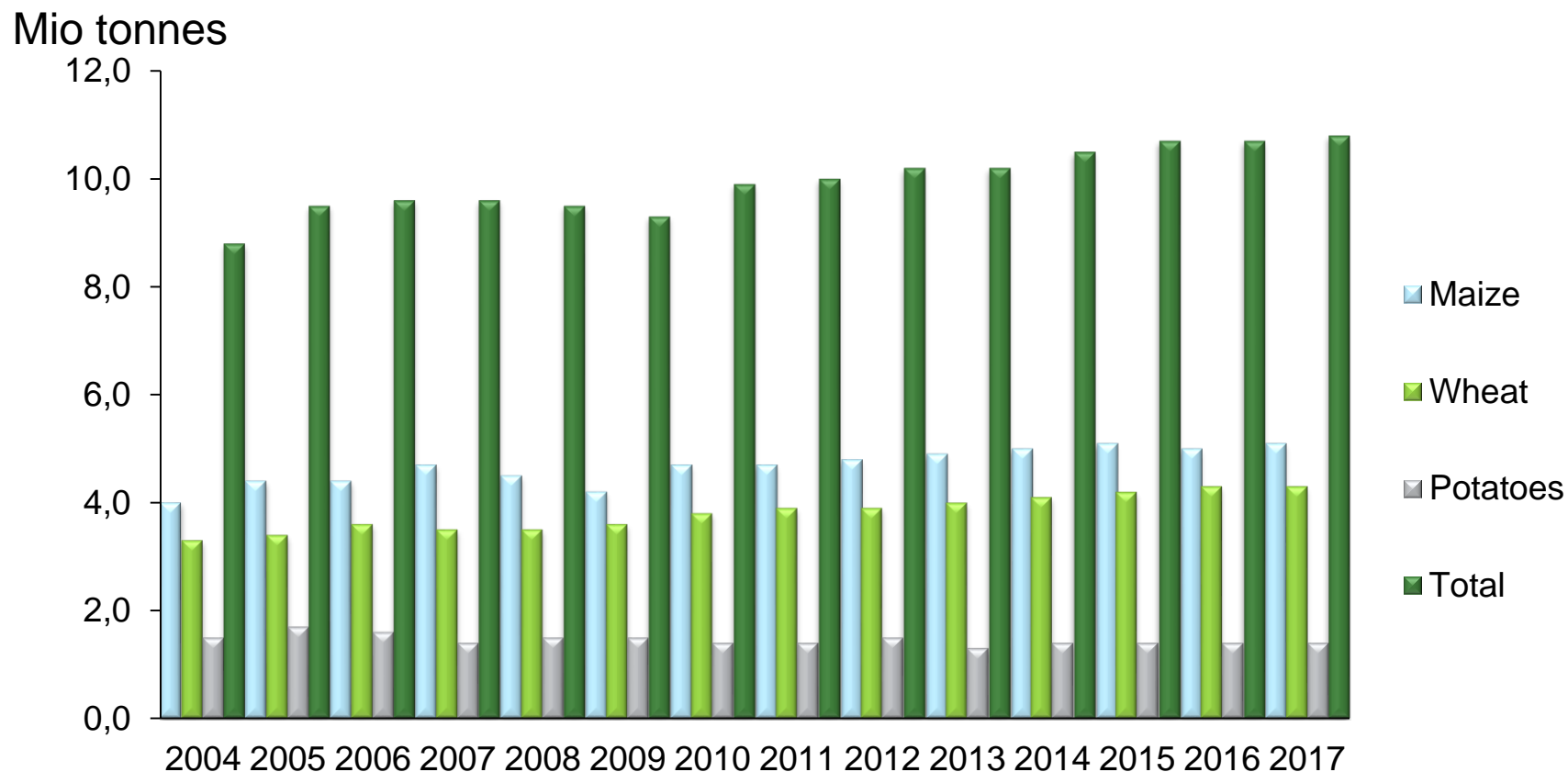
Total: 23,8 mio tonnes

Starch Products in Starch Equivalent



Total: 10,8 mio tonnes

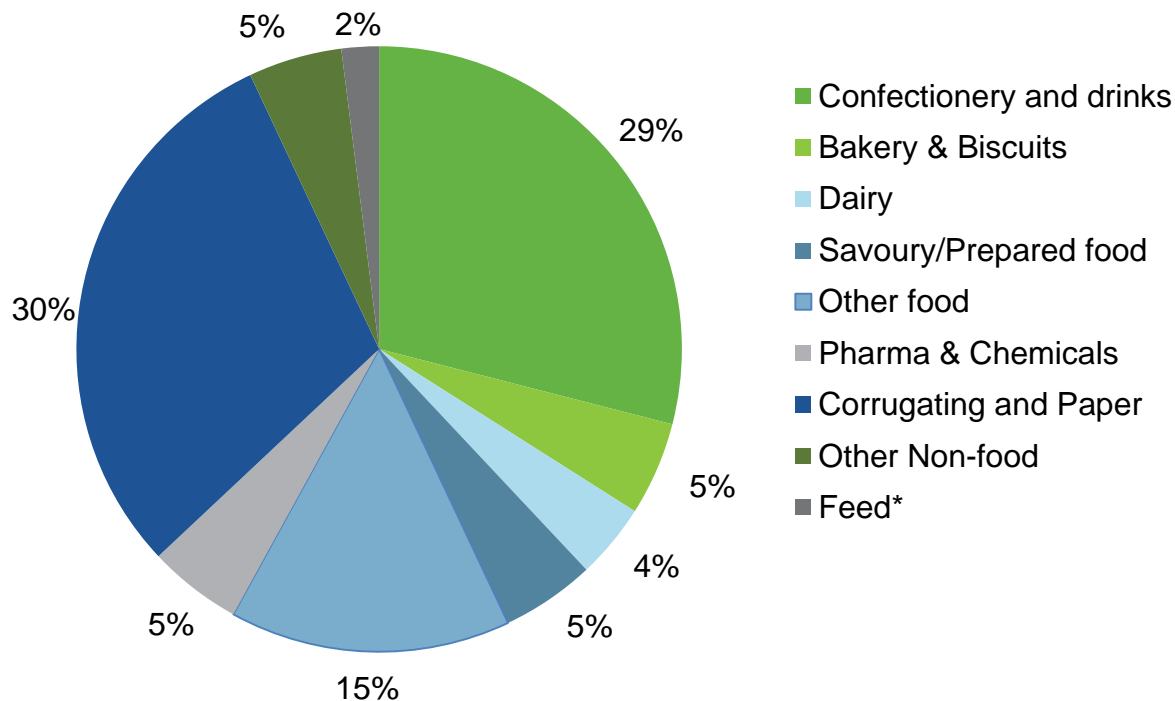
Starch Production in the EU



EU 25 FROM
2004

EU 27 FROM
2007

Main starch applications - 2017

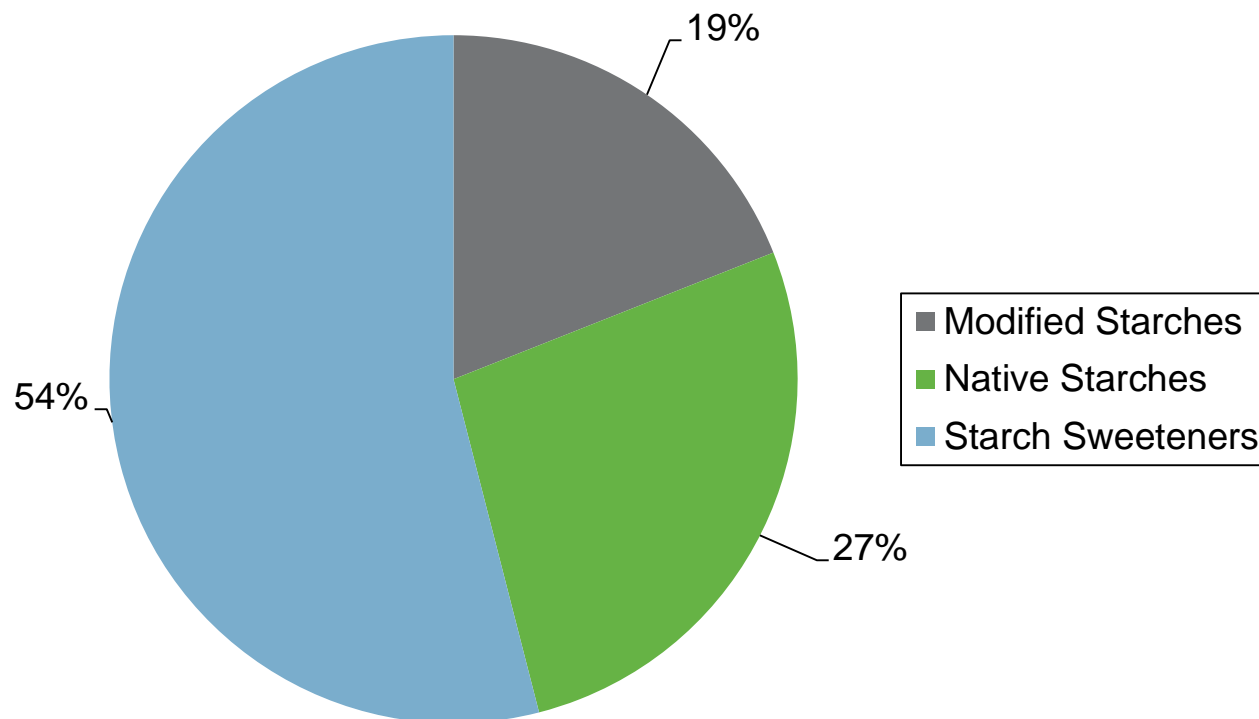


Total Market: 9,4 mio tonnes

* 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”



Product Reputation 2018-2019



WHAT WE HAVE DONE

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

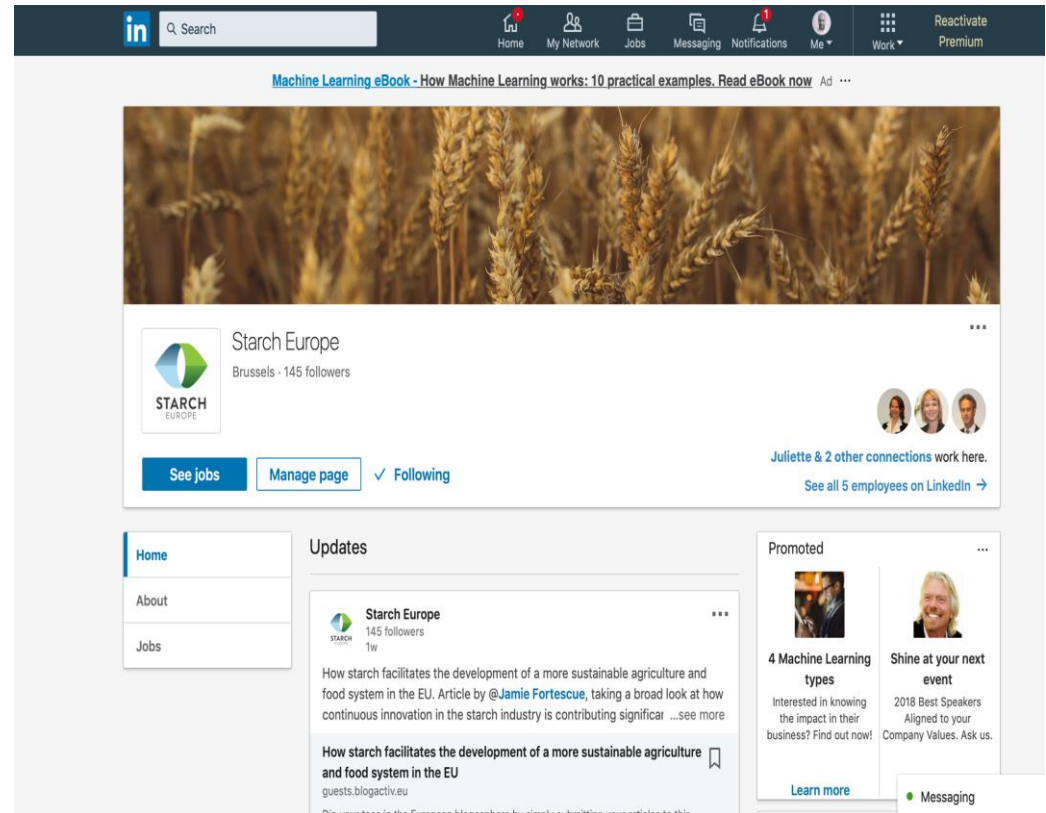
LinkedIn

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



Product Reputation 2018-2019

WHAT WE HAVE DONE

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



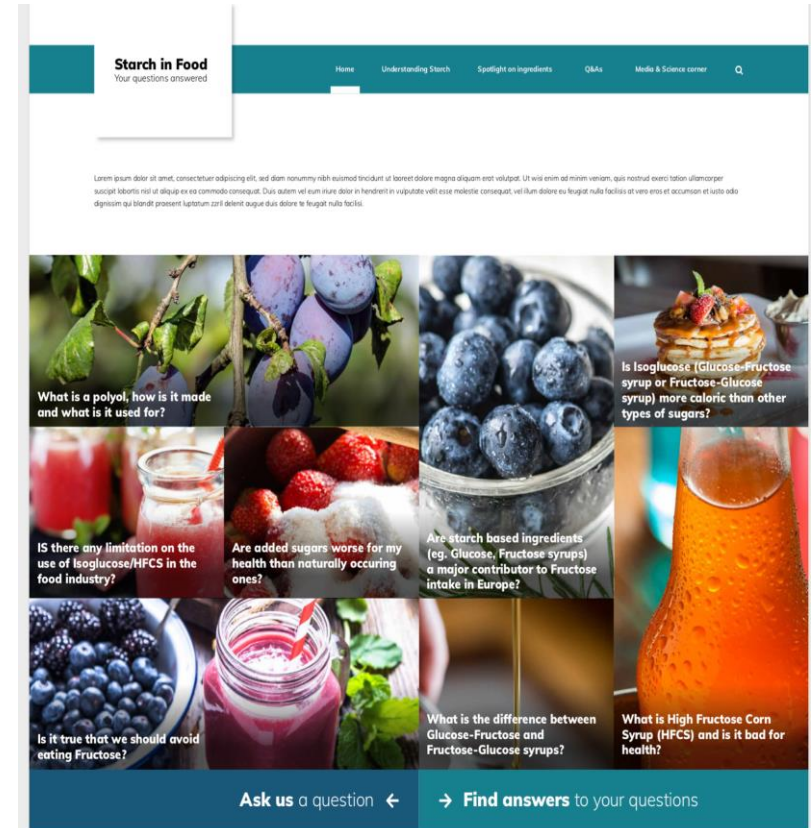
>800 Visits
October 2018

↑50%
(vs Oct 2017)

WHAT WE WILL DO

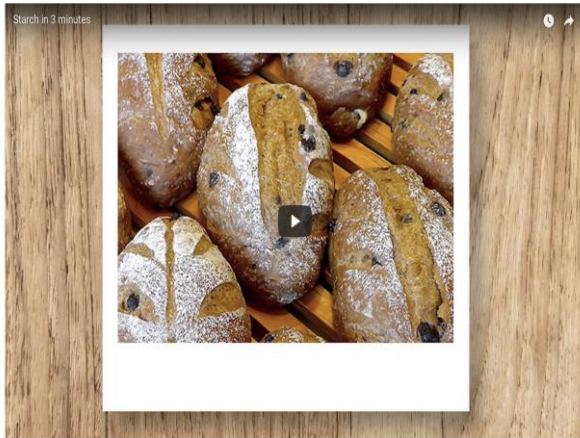
- Redevelopment currently being finalised
 - Broader content
 - Deeper content
 - Science Library/Corner
- Regular posting of material
- Sustained Social Media Promotion (Paid promotion on Social Media)

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)



43 Avenue des Arts – B-1040 Brussels
Phone +32 2 289 67 60 info@starch.eu
www.starch.eu