



Making the sugar world a better place

The EU Sugar Industry
Corporate Social Responsibility Report
2013





About this Corporate Social Responsibility Report

This is the 11th annual implementation report of the CSR Code of Conduct signed in 2003 by the European Federation of Trade Unions in the Food, Agriculture and Tourism sectors (EFFAT) and the European Association of Sugar Producers (CEFS).

The EU Sugar Industry CSR Report is adopted through an extensive consultation process whose purpose is not only to report but also to explore issues of common interest, to disseminate information on best practices while creating a spirit of collaboration and contributing to the capacity building of social partners in the face of current and emerging challenges for the sector.

The procedure for the adoption of this report is as follows: Every year, in September-October, CEFS and EFFAT Secretariats launch a consultation of their respective national delegations regarding the application of the Code of Conduct during that natural year. That consultation takes place first through a questionnaire regarding the application of each of the 8 minimum standards contained in the Code of Conduct. CEFS also convenes a meeting with its members later in the autumn of that year in order to analyse the responses to the questionnaire and eventually complete or update those. That meeting is also an opportunity to analyse the economic and political context in light of its impact on the sugar sector. The CEFS members present at that meeting are either company representatives (most often responsible for personnel matters) or social affairs experts within national sugar associations that collect and coordinate the response of their member companies.

Sugar companies generally use the knowledge drawn from their regular contacts with workers representatives to identify the challenges and best practices that are to be reported under the EU Code of conduct. The collected information is then contrasted with the ones collected by EFFAT and, in the event that inconsistencies would appear, the issue can be discussed at the level of CEFS and EFFAT Secretariats with the involvement, if needed, of the social partners of the company (ies) concerned.

At least two face-to-face meetings between EFFAT and CEFS are generally required in view of coordinating the content of the implementation report and the preparation of the annual plenary meeting of the social partners, where the report is adopted. Just before the plenary meeting (which traditionally takes place the last working day of February) both workers and employers representatives discuss separately the final draft report before the latter is discussed at the plenary. The plenary itself is designed, through presentations from experts on relevant topics, to explore in greater detail some of the topics described in the draft report as well as emerging issues that should be the focus of the social partners' joint work in the coming year.

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A decade implementing the industry CSR Code of Conduct: our joint work strengthens our confidence for the challenges lying ahead

A joint letter from the Chairmen

Welcome to this 11th edition of the EU sugar industry CSR report which celebrates its past 10 years of existence and looks with confidence into the numerous challenges that lie ahead for the sector in the next decade.

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Back in 2003, the sector was a pioneer in establishing a voluntary Code of Conduct for its industry based on an extensive number of principles to be monitored every year through an annual implementation report. Throughout the latest decade, more than 50 company good practices implementing the Code of Conduct have been analysed and made public in the common website of the social partners (www.eurosugar.org). The social dialogue that sustains this process of implementation has been crucial in facing the challenges of the 2006 reform and embracing the opening of the EU market to sugar imports from ACP and least developed countries. It has also been at the origin of various pan-European projects covering issues such as health and safety and employability in our sector.

In the context of social and economic changes, we should not forget that between 2006 and 2009 the sector had to implement a drastic restructuring which led to the closure of almost half our factories and the loss of half our workforce (more on that in section 3).

Last year has been a historic year for our sector. In December 2013 the EU decided to put an end, by 2017, to the quota system that has so far provided a reliable and stable framework for the sector while protecting the EU market against the excessive volatility of the world sugar market. As a result of this new reform, the whole economic organisation of the EU sugar sector will fundamentally change. It will be faced with more volatility and instability caused by a variety of factors. Some of these factors are out of our control, for example greater competition from isoglucose, exchange rate fluctuations, and governmental support to our competitors worldwide. We should continue to

support consistency between the Common Agriculture Policy and the EU's trade policy, and oppose concessions which risk generating market imbalances due to increased imports of non-preferential sugar that the EU market cannot absorb (more on that in section 4).

What lies ahead is the challenge to remain, as a sector, a model of overall sustainability by focusing on the factors we can influence. First, by becoming even more competitive, through improvements in agricultural techniques and plant breeding and, in the factories, through the reduction of energy consumption and developing further the potential of sugar factories as bio-based refineries. Second, by assessing in full our environmental impact, identifying and promoting good environmental practices and ultimately, by further improving our key processes and technologies. Finally, from a social perspective, we aim to further disseminate the good social practices resulting from the European CSR Code of Conduct, and continue our joint work in other areas such as adaptation to socio-demographic changes.

Economic, environmental and social sustainability are therefore the three pillars on which we rely to remain an important actor in the local economy, providing quality jobs and business opportunities in the EU rural areas where sugar industries are located.



Johann Marihart
CEFS President



Harald Wiedenhofer
EFFAT General Secretary



What is the EU CSR Code of Conduct ?

EIGHT minimum standards on:

1. Human Rights
2. Education, Vocational and Lifelong Training
3. Health and Safety
4. Relationship Between the Social Partners
5. Fair Pay
6. Working Conditions
7. Restructuring
8. Business Relations and Choice of Suppliers

GOOD PRACTICES in the implementation of the Code of Conduct are monitored every year and a number of them are added to the list of good practices for each of the eight minimum standards.

Companies aim not only to respect those minimum standards but also to implement those principles BEYOND their legal obligations.

The Code of Conduct has been assessed in accordance with ISO 26000 guidance on social responsibility and the 2011 UN framework on business and human rights.

The Code of Conduct and its associated Good Practices are available in the common website of the social partners

www.eurosugar.org

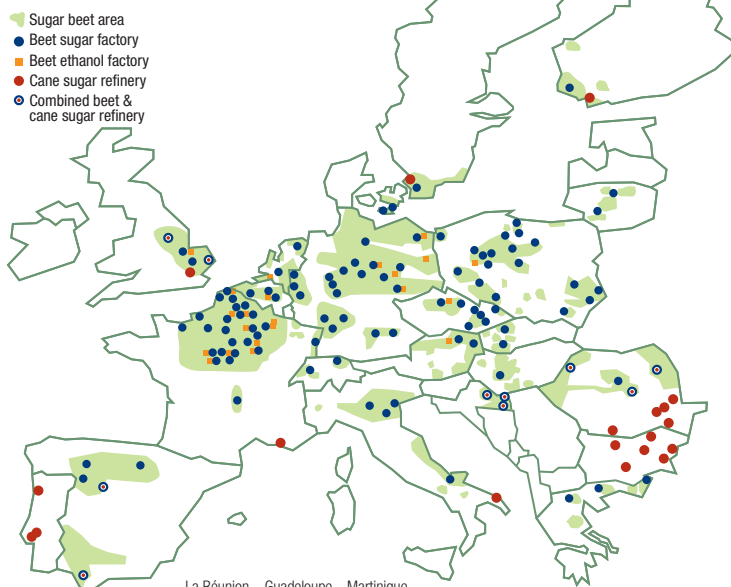
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Where are we coming from: the EU Sugar Reform from 2006 until Today

3

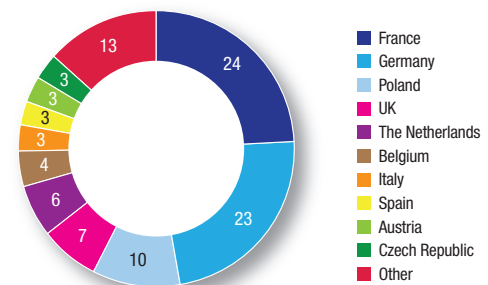
Beet and sugar production in the EU is based on a market organisation, known as the common market organisation of the sugar sector or sugar CMO¹. In 2006, this CMO was thoroughly reformed leading to a large reduction in quota sugar production. Key to the reform was a 36% cut in the reference sugar price and the removal of the intervention mechanism that guaranteed a minimum sugar price. Measures were taken to compensate farmers and a restructuring fund, funded by sugar producers, was set up to encourage less competitive sugar producers to leave the industry.

In the years leading up to and following the adoption of the CMO reform, the number of EU sugar factories has fallen sharply as the industry has undergone major restructuring driven by the need to improve efficiency. Virtually every country and region in the EU has been affected. In the EU-27, beet sugar production was distributed among 18 EU countries, as opposed to 23 before the restructuring, with 70% of the production concentrated in 7 countries.



Source CEFS - CIBE

EU sugar production per country (%)



Since the accession of Croatia to the EU in June 2013, there are 19 beet sugar producing countries in the EU-28.

This restructuring process has been radical. In the period 2000-2005, 68 factories were closed, an average of 11 per year. Between 2006 and 2008 a further 83 factories were closed. This is almost 28 per year, i.e. more than twice the pace compared to 2000-2005, resulting in an overall reduction of 60% of European processing capacity between 2000 and 2008. At the same time, average factory size has continued to increase, in particular in Western European countries (EU 15) which represent about 85% of the total EU beet sugar production.

The number of employees in the sector has followed suit. Between 2004 and 2009, for example, the number of employees in the sector has fallen by 44%.²

Despite this reduction, the sugar industry retains an important economic function in rural areas, where it guarantees jobs and training positions. As well as processing sugar beet, sugar factories are a partner for numerous small businesses and ancillary suppliers. Taking into account both direct and indirect employment, the beet sugar industry in the EU supports today about 180,000 jobs and contributes to the revenue of 150,000 farms.

(1) The common market organisation (CMO) for sugar was established in 1968 to ensure a fair income to Community sugar producers and self-supply of the Community market. In 2006 a major reform led to simplification and greater market orientation of the EU's sugar policy, which is now part of the Single Common Market Organisation (CMO). EU sugar policy currently concerns three main areas: quota management, a reference price and a minimum guaranteed price to growers, and trade measures. (Source: European Commission's website http://ec.europa.eu/agriculture/sugar/index_en.htm Last accessed on 10 February 2013)

(2) Source for all figures regarding the changes in the sector structure: CEFS Sugar Statistics (<http://www.comitesucre.org/site/statistics>).



Anticipating and preparing for change: the social dimension of the reform of the EU Common Agricultural Policy (CAP) post 2013

Key milestones:

- The Commission presented on 18 November 2010 a Communication on "The CAP towards 2020", which outlined options for the future CAP and launched the debate with the other institutions and with stakeholders.
- On 12 October 2011 the Commission presented a set of legal proposals designed to make the CAP a more effective policy for a more competitive and sustainable agriculture and vibrant rural areas.
- On 26 June 2013 a political agreement on the reform of the CAP has been reached between the Commission, the European Parliament and the Council.
- On 16 December 2013 the Council of EU Agriculture Ministers formally adopted the four Basic Regulations for the reformed CAP as well as the Transition Rules for 2014. This follows on the approval of these Regulations by the European Parliament in November 2013.
- On 20 December 2013 the four Basic Regulations and the Transition Rules were published in the Official Journal of the EU.

EFFAT and the European Committee of Sugar Producers (CEFS) carried out a campaign over 2012 and early 2013 to secure the prolongation of the current sugar CMO until 2020 as the initial proposal from the Commission foresaw the end of the quotas in 2015. They were joined in their efforts by the European beet growers (CIBE) and the African, Caribbean and Pacific (ACP) countries. Despite a major success at the European Parliament, which supported the prolongation of the sugar CMO until 2020, a political compromise was struck under the Irish presidency of the EU on 26 June 2013 and settled for a phase out of the quotas in 2017, 2 years more than the initial Commission proposal.

The end of the current Single CMO for sugar marks a historical moment for the sector. Both social partners CEFS and EFFAT have asked for the prolongation of the Single CMO for sugar until 2020 because (1) it provides the sector with predictability and stability – it counters world market instability, thus securing stable supply, (2) it enables the European sugar sector to continue to optimise its competitiveness and efficiency and (3) it provides, according to EU international commitments, the Least

Developed Countries and ACP developing countries with more time to invest in their infrastructure.

This decision comes soon after the drastic reform carried out in 2006 in which the sector, together with social partners, acted responsibly by restructuring. This saw, as already mentioned, the closure of 83 factories (one in two) and the loss of more than 22,000 direct jobs. Ending the current Single CMO for sugar three years earlier than planned (from 2020 to 2017) without the correct mechanisms in place risks undermining the sector's efforts to become more efficient at a time when it is continuing to optimise its competitiveness in order to compete on the world market on an equal footing after 2017.

As a result of the CAP reform approved in December 2013, the whole economic organisation of the EU sugar sector will fundamentally change. Quotas and market intervention tools will disappear, and the EU sugar sector will face more internal competition with isoglucose. It will become one of the most liberal systems in the world, in contrast to many of its competitors which support their industries



in various forms. For example, State subsidy in the Brazilian sugar and ethanol industries makes it even harder for EU producers to bridge the competitive gap with Brazil.

In addition, having already fully opened its borders (duty free – quota free) to all its preferential suppliers i.e. Least Developed Countries (LDCs) and ACP countries, the EU has recently granted additional concessions to Ukraine, Colombia, Peru, Central American Countries and Canada. Unfortunately, the EU sugar sector is no longer in a position to absorb any further imports which would concede market share on a permanent basis to the EU's main competitors, to the detriment of EU domestic production and the EU's traditional preferential trade patterns, particularly those with ACPs and LDCs.

Furthermore, the Commission's recent report 'The Prospects for Agricultural Markets and Incomes in the EU 2013-2023' suggests that the EU sugar price could fall to €408/t in 2017 when the market is liberalised. At this price, the average EU sugar production costs will not be

covered, and storage aid funded by the EU budget is highly likely to be triggered. This would also force the EU sugar sector to have to restructure again, jeopardizing jobs in Europe. Those changes would no doubt produce long-wave social consequences that social partners need to anticipate very quickly and that will require extra efforts to elaborate and organize socially acceptable responses.

Legal clarity, market stability and a responsible market management by the Commission, particularly towards the end of sugar quotas, is of the utmost importance for the industry. Workable and reliable technical provisions need to be implemented to guarantee the sector's future. Additional market measures like new imports or the release of out of quota sugar on the EU market need to be used only if they are necessary and if market conditions so require it.





Focus on some good practices reported in 2013 under the CSR Code of Conduct



- Training on leadership, communication and conflict management



Nordzucker

- 
- ➔ **CSR standards concerned:** Education & Training.
 - ➔ **Place and time of implementation:** Germany, 2013.
 - ➔ **Theme:** Leadership, communication and conflict management for engineers and foremen.

The context:

Nordzucker has a large number of engineers and foremen who have been in management positions for many years, and the company needs to find successors. The challenge is to update the current knowledge of the people in management positions and at the same time to allow young, higher-education engineers and foremen to take over management positions in the future. The idea is to develop a concept for employees who already have some leadership knowledge to get an “update” and to get employees with less leadership knowledge to help them with the transfer from theory to practice.

The goals of the initiative:

- Upgrading leadership competences.
- Creating a common leadership concept.
- Creating a sustainable education process.
- Increase employee satisfaction.
- A learning scenario where several generations are “learning together”.
- Increasing networking between the sites.

The project in practice:

The target group was composed of approximately 100 engineers and foremen. The training workshop took place over two days

and included networking opportunities in the evening. Practical education, with simulation from examples of the everyday life of the person being trained, played a large role in identifying the participants’ training needs in terms of leadership, communication and conflict management. The training workshop itself was preceded by intensive preparation (interviews between participants and their closest managers) and follow-up activities (feedback interviews and agreement on education goals) with adequate record-keeping throughout the process.

Results and evaluation:

Concerning the social responsibility of the company the following positive results were identified from the initiative:

- Assisted the management with an appropriate action plan to take their leadership tasks seriously.
- Improved the cooperation and handling of conflicts.
- Made the employees more satisfied.
- Contributed to the motivation of the employees.
- Supported the employees at a time when the company is developing.
- Allowed the company to be at the forefront of demographic changes.

Contact:

If you would like to know more about this good practice please contact:

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B - Dealing with longer campaigns: workplace health promotion project



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- ➔ **CSR standards concerned:**
Restructuring, Working Conditions, Education & Training...
- ➔ **Place and time of implementation:**
Austria, 2012-2013.
- ➔ **Theme:** Dealing with longer campaigns: Workplace Health Promotion Project.

The context:

The restructuring of sugar factories due to the EU sugar reform that started in 2006 and lasted until 2009 has led to a progressive concentration of production from closed factories into the remaining ones. In practice this means longer processing campaigns for the factories which can be a source of stress-related issues.

The goals of the initiative:

In August 2012 AGRANA Sugar (plants in Tulln & Leopoldsdorf) and the Zuckerforschung Tulln started with the implementation of the Project "Workplace Health Promotion". The purpose of the Project is to secure the needs of our employees regarding health care, social welfare and better working conditions during the shift and in general.

The project in practice:

The Project duration is two years. Starting with an employee survey, the employees have the possibility to work within quality circles on their topics and find critical solutions. After presenting these solutions to a steering

committee, the implementation starts. At the end of two years, there will be a new employee survey to measure the progress. First stage of the project:

- Learning how to deal with stress.
- Personal health and safety trainings for seasonal campaign workers.
- Trainings to maintain the work-life balance; feeling responsible and keeping a balanced nutrition when working in shift.
- Workshops about 'acting more than reacting'.

Second stage:

- Groups are working on special solutions for people which are working in shifts.
- Employee survey to measure the success of the project.

Results and evaluation:

The training activities and group work started in 2013. First solutions, which had been worked out by the employees, are already implemented. The main success of the project so far is that the employees improved and developed their own resources in a more active way and ensured that when a problem occurs they will find together a common solution.



C - Burn-out training and conciliation of family life in Südzucker Germany



SÜDZUCKER

- ➔ **CSR standards concerned:** Restructuring, Working Conditions, Education & Training...
- ➔ **Place and time of implementation:** Germany, 2013.
- ➔ **Theme:** More Success by active Self-Management: How to realize, use and develop own resources.

The context:

A successful career, a fulfilled life, health and the feeling of living a meaningful life - a nice imagination, a longing desire, an unrealistic utopia? Instead of that: "I am stressed!" is the omnipresent cry in our time.

But how do we get the many necessities of life and working obligations in a good balance? How can we make sense when dealing with stress? How can we make good use of our own energy, to exploit our own resources and reduce energy blockages and finally achieve our goals, instead of living with them in a state of war?

The goals of the initiative:

- To help participants get an insight into their own behaviour
- Learn to deal with their stress,
- Learn to maintain their work-life balance in a better and productive way, through the use of their own resources
- Learn to act more and react less.
- To help employees in achieving their goals with more serenity and joy.

The project in practice:

The learning project was divided into two modules. Module 1 covered the topics of:

- Work-life balance, including a personal life balance check and the issue of permanent accessibility due to new technologies,
- 'Access to your own resources' through the LIFO method to identify behavioral strengths under (un-)/favorable circumstances as well as how our own behavior can be perceived by others.
- Everyday stress (in general), focusing on stress triggers, identifying behavioral responses to stress, good and bad levels of stress, etc.

Under Module 2, participants worked on the following:

- Everyday stress, with a more individual focus, linking individual strength profiles analysed under the LIFO method and stress situations. It also introduced participants to different relaxation methods and their adequateness for different individual profiles.
- 'Between success and burn-out' covered the burn-out signals, the phases of burn-out and measures for its prevention.
- 'Self-Management – live better and more relaxed': this section aimed to put together all the knowledge gained during module 1 and 2 putting it in the context of daily practice and providing tips for greater awareness and mood management.

Results and evaluation:

The training activities started in 2013 and the first feedback shows that the participants have learnt to know better their own patterns of behaviour, their individual stress factors and especially the need to develop their own resources in a more active way in order to avoid burn out problems.

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Joint projects developed in 2013 involving the social partners

A - The EU beet sugar sustainability partnership

In October 2013, The European beet growers (CIBE), sugar producers (CEFS) and trade unions of the food and agriculture sector (EFFAT) publicly announced a landmark agreement to jointly highlight and report on representative Good Practices of sustainable production of beet sugar in the EU.

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EFFAT



Why sustainability?

Sustainability is a multidimensional concept that encompasses economic viability, environmental protection and social responsibility. With its flagship '**Europe 2020 strategy**' the EU has put sustainability at the heart of the European project with the purpose of creating conditions of **growth that is 'smarter, more sustainable and more inclusive'**.

This partnership agreement between European beet growers, sugar producers and trade unions in the beet sugar sector aims to report on **good agricultural, industrial, social and environmental practices for the sector** while taking into account the relevant elements of economic viability needed for stable and reliable beet sugar production in the EU.

Why now?

European beet sugar production has achieved high levels of sustainability through continuous **improvement in all three dimensions of sustainability (economic, environmental and social) in recent decades**. Their more recent sustainability performance is recorded in the joint environmental and social projects set up in the last decade and still ongoing (see 'further

reading' section at the end of this document). The three partners of the European beet sugar sector acknowledge that in order to ensure the long-term sustainability of their sector they must continue to develop and disseminate good practices that support the consolidation of sustainable practices in EU beet growing and processing. Hence, through a common understanding of what constitutes sustainable production of beet sugar in Europe, **the partners' aims are:**

1. To facilitate the **access to and dissemination of knowledge** regarding sustainable practices in the sector.
2. To help **consolidate sustainable practices in EU beet growing and processing**.
3. To provide a **platform for future dialogue** in the field of sustainability with other sector stakeholders.

How will the project be carried out?

The partners have agreed to create a working platform, including a **steering committee and three technical working groups**, covering notably agriculture, industrial and social aspects of beet sugar production in Europe. In addition, partners intend to involve **external expertise** to provide independent advice for this partnership.

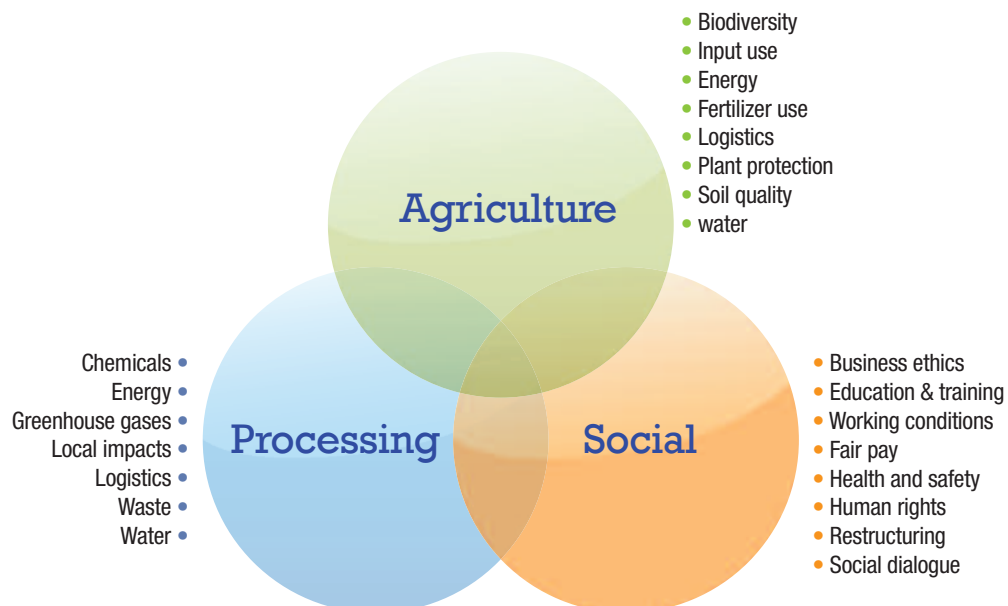
The partners will be working together, engaging in a **constructive dialogue and exchange with other stakeholders**, while managing the overall

process to deliver a **concrete outcome** for the sector within the following **timeline**:



What topics will be dealt with in this sustainability partnership?

Although only the joint work of the partners and, later on, the consultation of stakeholders will determine the final outcome of this joint work, the partners have agreed that as many topics as possible should be looked at, including at least the following:



B - Socio-demographic mapping of the industry

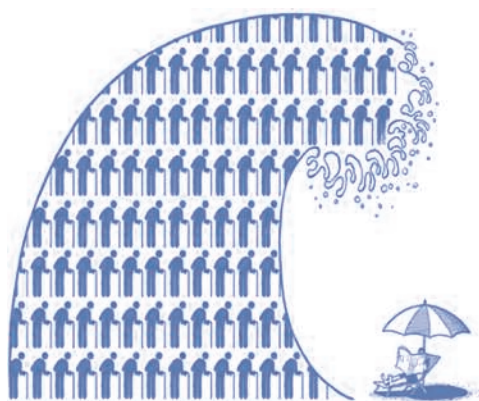
Background

One of the key topics that emerged during the discussions in the Social Dialogue Plenary in the EU sugar sector in 2012 were the concerns regarding succession planning and the increasing age of the sugar industry's workforce.

As in most manufacturing sectors and in the EU population in general, the **increase in life expectancy and retirement age** in most EU 27 countries is calling on social partners in various sectors to reflect upon new ways to ensure **successful succession planning** (involving a smooth transition and the transmission of know-how to the new generation of workers) as well as **health-related management issues**, in particular for older workers.

Over the past 10 years, the sugar sector has also been particularly hit by a massive wave of **restructurings**. One of the challenges has been to manage such changes and the consequences those changes can have for the mood of employees and its health impacts, including **socio-psychological risks**. Social partners would therefore like to continue their exploration of the issue to draw lessons from the experience of the sugar sector in this field and to encourage their members to mainstream the topic of health at the workplace (including psychosocial risks).

Youth employment also enters the picture as it has now clearly become a major social and economic problem in the EU. Despite the difficult restructurings it has faced over the years, the EU sugar industry has a role to play in providing young people with access to the labour market, in particular in rural areas.



Project description

The study includes the following dimensions:

1. Socio-demographic features of the EU sugar industry workforce.
2. Measures to promote active ageing.
3. Measures specifically addressing succession planning and transmission of know-how.
4. Measures promoting access of young workers to the EU sugar industry.
5. Job profiles in high demand in the EU sugar industry.
6. Conclusions and recommendations for further social partners' actions.

Data has been gathered through a survey of EU sugar companies and trade unions in the sugar sector between October 2013 and February 2014. Partial results were discussed during a joint technical group meeting on 24 October 2013. A final draft report is expected to be adopted in the first half of 2014. Results will be reported in greater detail in next year's CSR Report.

Our CSR objectives for 2014 and beyond

Objectives	Timing	Status
For good social practices		
Monitor the implementation of the EU Code of Conduct in 2014-15	2014-15	■
Update the Good Social Practices in the social partners' website www.eurosugar.org	2014-15	■
Identify and further develop issues resulting from the demographic analysis conducted in 2013-14	2014-15	■
For competitiveness & fair competition		
Monitor the evolution of the EU Sugar Regime with a special focus on its economic and social impact for the sector.	2014-2015	■
Monitor the evolution of the EU Industrial and Trade Policy with a special focus on their economic and social impact of bilateral trade agreements.	2014-2015	■
For the environment		
Support the technical work of the EU Sustainability Partnership on Beet Sugar.	2014-15	■
Set up Partnership formal communication with other stakeholders.	2014-16	■
For transparency and communication		
Continue to develop the accessibility of the CSR report to a broader public.	2014-16	■
Update the current social partner's website.	2015-16	■

■ On track

■ Project yet to be set up

7

ANNEX - Company CSR Reports Published in 2013*



AB Sugar – partial report within Associated British Foods CSR report 2013.

Geographical coverage within the EU: UK, ES.

Time coverage: until 2013

Topics: Selection of CSR topics.

Remarks:

E-source: <http://www.abf.co.uk/responsibility>



Agrana Group – CSR/Sustainability report 2012/13

Geographical coverage within the EU (sugar): AT, CZ, HU, RO, SK.

Time coverage: until 2012.

Topics: Selection of CSR topics.

Remarks: Selection of indicators based on Global reporting Initiative (GRI), G3.1.

E-source: <http://www.agrana.com/en/pr/downloads/>



Nordzucker Group – CSR/Sustainability report 2012/13

Geographical coverage within the EU: DE, DK, FIN, LITH, SVE, PL.

Time coverage: until 2012.

Topics: Overall sustainability (economic, environmental, social)

Remarks: Broad selection of indicators based on Global reporting Initiative (GRI), G3.1.

Includes materiality analysis and matrix (AccountAbility).

E-source: <http://www.nordzucker.de/en/company/downloads.html>



Suiker Unie Group – Sustainability report 2012/13

Geographical coverage within the EU: NL.

Time coverage: 2012.

Topics: Overall sustainability (economic, environmental, social)

Remarks: Broad selection of indicators based on Global reporting Initiative (GRI).

E-source: <http://www.suikerunie.com/Sustainability.aspx>

(*) This includes all reports known to us and/or communicated to us by sugar companies.

**CEFS**

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CEFS, founded in 1953 represents all European beet sugar manufacturers and cane sugar refiners, covering sugar production in 21 EU countries plus Switzerland.

**EFFAT**

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Trade Unions

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EFFAT, results from the merger of two European federations (ECF-IUF and EFA) in 2000. It represents 120 national trade unions from 35 European countries, defending the interests of more than 2.6 million members in the food, agriculture and tourism sectors.