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AB Sugar at a glance

Over £89 million in total capital investment across the group in 2016/17



Sugar production capacity of up to

4.5 million tonnes

30,000

23% of senior management are female

25,000
growers
worldwide

reduction in greenhouse gas emissions across the Group since 2015

13% reduction in total water abstracted across the Group since 2015

A message from our CEO, **Dr Mark Carr**

"Our commitments are ambitious but represent the next step of our journey towards becoming the world's leading sustainable sugar business."



As one of the leading industry players, our commitment to creating long-term stakeholder value remains steadfast.

With operations in 10 countries across three continents, our value commitment extends across our end-to-end supply chain and into all the communities in which we operate. Our 'Global Mind, Local Champions' sustainability framework enables us to respond to the emerging demands that we face, to lessen our footprint as a responsible business and

to grow a sustainable future for those around us. Each of our businesses plays a part in delivering this framework within their local markets and our annual review features case studies highlighting our progress and achievements to the year ending 2017.

Our ambition to be the world's leading sugar business means we must be bold in our approach. As an **industry first**, we have set a series of Group commitments for how we and our supply chain will continually

improve our sustainability performance by 2030. These commitments are ambitious but represent the next step of our journey towards becoming the world's leading sustainable sugar business. While we have made great progress against our framework: there is still more to do and I am confident we and our partners will rise to this challenge and help grow a sustainable future for our Group and all our key stakeholders.

Dr Mark Carr, AB Sugar



Global Mind, Local Champions

Global Mind, Local Champions is AB Sugar's sustainability framework which ensures our future development supports both our longterm success and the sustainability of the local communities where we operate. Global Mind, Local
Champions sets out our
global principles and
priorities for how to address
the emerging challenges
we face across three broad
pillars; economic, social and
environment. The delivery
of this approach is then
implemented on the ground

by each of our businesses. This approach not only ensures our framework is central to everything that we do but also recognises the various challenges and demands each business faces in their countries of operation.

Our three pillars of sustainability



Our 2030 ____commitments_

To help us achieve our vision of being the world's leading sustainable sugar business, we have taken the decision to integrate Group-wide commitments into our Global Mind, Local Champions framework.

These industry-leading goals sit within our three pillars which we and our businesses aim to collectively achieve across the supply chain by 2030:



Building rural economies

Build vibrant, diverse value chains that increase the prosperity of our communities



communities

Provide access to objective scientific advice on sugar, the diet and health to over 25 million people around the world



Reduce our end-toend supply chain water and CO₂ footprints by 30% and ensure all our plastic packaging is reusable, recyclable, biodegradable or compostable

Designed to support the UN's Sustainable Development Goals (SDGs) and their objectives for 2030, these aspirations will frame our sustainability work for the next decade and will involve work across the supply chain to improve both our direct and indirect impact across the three pillars. In keeping to our Global Mind, Local Champions framework, they will be delivered in different ways by our businesses. This reflects the bespoke challenges each business faces as well as the different opportunities that exist in their operations and countries where they can make the biggest impact.



The following two pages show how our businesses are collectively working towards these commitments this year within the economic, social and environmental pillars of our Global Mind, Local Champions framework.





Promoting sustainable agriculture and creating social economic impact

A sustainable agricultural supply chain is paramount to the future growth and success of our business as well as the prosperity of the more than 25,000 growers we partner with worldwide.

Food security and safety are perennial concerns while economic growth of rural communities, especially in the poorest parts of the world, is increasingly hindered by rising urbanisation.

Across each of our businesses, we engage with growers and others in our supply chain to focus on producing sugar as efficiently and responsibly as possible.

We primarily do this through improving productivity, discarding outdated ways of working, sharing best practice between businesses, and utilising technology and innovation to create a more modern sugar industry.

This ultimately results in improved crop yields, helping farmers create more from less, as well as providing our factories with a more robust and productive crop supply year-on-year.





Tackling modern slavery and Making Sense of Sugar

Modern Slavery

As a subsidiary of Associated British Foods (ABF), AB Sugar and its businesses are each committed to ABF's Modern Slavery Policy.

However, we know there is more to do to embed this policy throughout our supply chain and enhance our commitments to reflect the specific challenges in the sugar sector. We have taken

significant strides forward in recent years to tackle some of the biggest challenges facing human rights internationally, including land rights and forced labour in southern Africa. We are now working to clearly articulate these principles to our workforce, growers and the wider supply chain as well as offering routes in reporting potential abuses and other grievance mechanisms.







continued

Making Sense of Sugar

In 2014, AB Sugar launched its 'Making Sense of Sugar' campaign in the UK, which provides factual information based on robust science to help inform and educate people about sugar and the role it can play as part of a healthy balanced diet.

To date, our campaign has had over 1.6 million views but with the debate on sugar and health taking a bigger profile internationally, we are now aiming to expand 'Making Sense of Sugar' to a more international audience.

This work will look to incorporate the bespoke challenges and cultures of the different countries we operate in but with a continued focus on providing science-based information. These efforts and the continuing campaign in the UK will help us reach our commitment to inform and educate 25 million people worldwide by 2030.







Reducing our environmental footprint

Water and energy are the most vital resources to all of AB Sugar's businesses and each are increasingly under risk in a world facing climate change, population rises and increasing constraints and depletion of natural resources.

This provides a clear business case for reducing our environmental impact, not only for our businesses but for the growers we support and their local communities.

Many of our sugar factories already operate to high environmental standards through a circular economy model where outputs from the sugar making process are turned into co-products; such as energy, animal feed and bioethanol. Yet our energy and water usage are nonetheless substantial, especially in relation to agriculture and logistics in our supply chains.

That is why our Global Mind, Local Champions framework prioritises reducing our greenhouse gas emissions and ensuring responsible water stewardship.

We also recognise the need to take action to reduce the amount of plastic we use for packaging, both for industrial and consumer use.

Ensure
all our
plastic
packaging
is reusable,
recyclable or
biodegradable
by 2030

AB Sugar China



AB Sugar China is a thriving sugar beet processing industry, producing up to 200,000 tonnes of sugar from two factories in Zhangbei and Qianqi as well as coproducts such as animal feed and molasses. The company employs over 2,000 people and partners with 11,000 growers.

Transforming beet sugar agriculture in China

As one of the youngest sugar companies in the group, AB Sugar China has seen a dramatic transformation over the past 10 years to make its sugar making process more efficient and sustainable as well as providing support to the growers it partners with.

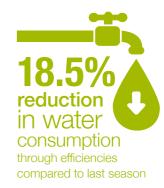
Since 2007/08, AB Sugar China has made a concerted effort 166%
growth in growers'
net income 5%
over the last 5%
due to mechanisation and plantation technical evolution

to modernise growers' agricultural businesses, both in terms of mechanisation and best farming practices. The company has invested over RMB200m on agricultural machinery to help growers be more efficient and reduce intensive manual labour.

AB Sugar China has worked extensively with growers to educate them on how to best grow their crop sustainably, through its Sustainable Agriculture Programme. Whereas

previously this knowledge sharing was basic with minimum research and development, today, the business offers a multichannel, targeted approach which focuses on delivering simplified content supported by comprehensive research and development to growers over various channels, including social media.

This modernisation through technology and the evolution of plantation techniques has seen tremendous results.



¥190m in co-product sales last year including animal feed & molasses

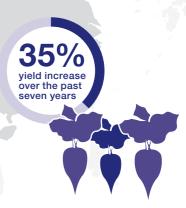
Over 70% of the farming area is now mechanised whereas there was none a decade ago in 2007/08. In the same period, growers have doubled their beet volume to 1.2 million tonnes and have improved their average yield by 67%. As well as benefiting the business, this has also meant growers' net incomes from beet have

risen by 166% in the last five vears alone.

Training the beet growers of the future

A key challenge for AB Sugar China is ensuring there is a sufficient pipeline of well-trained beet growers to deliver a sustainable growth in the crop for the future. With this in mind, the company set up the 'Beet and Technical Academy' which looks to train professionals, village leaders and growers in agricultural best practices.

Of the total large growers¹. AB Sugar China partners with each year, 40% are new growers who are given the confidence by the Academy to choose the crop despite never having grown it before.





Azucarera (Spain)



Azucarera is the leading sugar producer in Iberia, supplying industrial customers in Spain and Portugal primarily through its operating sites across the north and south.
Azucarera supports over 3,000 growers, employs approximately 900 people and can produce up to 800,000 tonnes of sugar per year.

Enhancing employee safety and well being

Azucarera has made improving employee safety a top priority amongst its factories and supply chain through a programme designed to deliver greater safety awareness across all of its sites. Critical to this has been shifting the perspective on safety away from just measuring 'absence of injury' and towards measuring the 'presence of safety'.

100% of energy used in the cane refinery is selfgenerated

during the 2016/17 campaign 116,563 MWh of electricity exported to the national grid

A key highlight of this work this year has been Azucarera's new Health and Safety Global Index which focuses on seven main areas of work regarding the safety of staff (contractors; management of actions; commitment and participation; preventative culture; task procedures; health and safety conversations; and accidents). Key to this approach is a strong

emphasis on the importance of management, integration and leadership which are embedded in safety cultural practices across the working environment.

These efforts have reaped significant benefits for the business and its staff. In a new record for safety at the company, three out of five production centres completed a year without a single Lost-Time Injury (LTI). Overall, Azucarera reduced the number of total accidents by 21% and met its target to have fewer than three LTIs in 2016/17.



Azucarera has also focused on supporting staff well being, launching last year the 'Healthy Stand' where nurses spent two weeks at each site offering information and advice related to awareness campaigns on heart attack prevention and factory noise protection.

Inspiring the next generation

Azucarera has a strong relationship with its local communities including close engagement with schools. This year, the business ran a student awareness campaign in the La Bañeza

region called 'Azucarera Classroom'. This initiative looked to inspire the next generation of growers and engineers in the sugar industry as well as creating awareness of the contribution sugar makes to growing rural economies. The campaign reached nine institutes and 300 students. including 100% of 4th grade students in public schools. Azucarera has also made considerable investment in its own training programmes, investing over €870,000 in 51 apprenticeships and 15 graduate training programmes.





British Sugar



British Sugar is the sole processor of sugar beet grown in the UK, predominantly across East Anglia and the East Midlands. It has the capacity to produce 1.4 million tonnes of sugar from 8 million tonnes of beet supplied by on average over 3,500 growers.

A home grown industry, British Sugar contributes £700m per year to the UK economy, supporting up to 9,500 jobs throughout the UK, in addition to the 1,400 skilled people it employs at its four advanced manufacturing plants.

One of the most efficient sugar processors in the EU

Following the removal of EU domestic quotas in October 2017, British Sugar now operates in a highly



competitive environment and as such British Sugar has undergone enormous efforts over the past decade to become one of the most efficient sugar processors in the EU².

British Sugar has spent over £300 million in the past six years to increase efficiency and productivity in its advanced manufacturing plants. In the last year, it invested £35m in capital expenditure alone, including a Warehouse Optimisation project at its Wissington

site to improve warehouse efficiency via increased automation. These types of efficiencies are the reasons why British Sugar can operate at a high productivity rate and process the same amount of beet as they were 20 years ago but with six fewer factories.

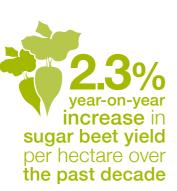
This efficiency is also reflected in British Sugar's research and support for growers which have had their beet yields increase by 2.3% year-on-year over the past decade, from 60 to 84 tonnes per hectare³.

A leading circular economy in the UK

Part of what makes British Sugar so efficient is its circular economy approach which aims to make the most out of every root of sugar beet to produce over a dozen co-products extracted from the sugar making ³ British Sugar beet bought and grower declared hectares planted

⁴ As reported to Ofgem under the non-domestic RHI scheme

⁵ British Sugar own data for internal reporting



process. These co-products include: animal feed, topsoil, bioethanol, horticulture among many more.

Some of the co-products are also used by British Sugar itself, such as renewable energy. For example, in 2016/17 the £15m anaerobic digestion plant at Bury St Edmunds produced and used 35,675 MWh of heat⁴.

This circular economy model and the investment in productivity also has clear environmental benefits. The range of co-products means British Sugar recycles 99% of its non-hazardous waste and this equates to less than 200 grams of waste for every tonne of sugar produced. The company's carbon emissions have also fallen by 4%⁵.





Illovo Sugar Africa (Pty) Ltd





is provided from renewable sources primarily bagasse

R3 billion Total paid in salaries, wages and

benefits⁷

Illovo Sugar Africa (Pty) Ltd (Illovo) is the continent's largest sugar and downstream products manufacturer, with 18 manufacturing plants across Malawi, Mozambique, South Africa, Swaziland, Tanzania and Zambia, processing 14 million tonnes of sugar cane from a combined 180,000 hectares of its own land and of independent growers to produce almost two million tonnes of sugar.

All businesses make considerable investment in their communities, primarily in education, healthcare, housing and other general infrastructure. In 2016/17, this community investment totalled R10 million⁹.

Respecting and enhancing land rights

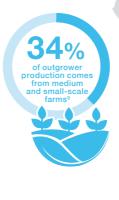
Land rights are a material risk for Illovo and it has been working towards developing a transparent and comprehensive approach to the issue. Illovo has designed comprehensive guidelines on land and human rights as well as established and trained 'Land Champions' at its operations in each country. More recently, Illovo has partnered with international NGOs, such as Landesa, and government donors (including the UK's Department for International Development - DFID) to commence building a comprehensive understanding of the local challenges and complexities around land in each of Illovo's countries of



- Total Economic Impact' includes direct impacts (e.g. tax payments, direct employment), indirect impacts in the value chain (e.g. sourcing sugar and paying suppliers) and induced impacts through spending by direct and indirect employees, The Impact of Illovo in Africa', Corporate Citizenship (2017)
- The Impact of Illovo in Africa: Socio-economic impact assessment by Corporate Citizenship, October 2017

operation. This work will help avoid complicated disputes in the communities which surround the Group's cane estates and proactively find equitable resolutions for competing land claims more efficiently.

Illovo's land rights strategy has been internationally recognised and is already seeing significant changes to its business practices and mind set with regards to new developments. While there is still a long road ahead, the past year has seen another significant step forward towards an ethical and sustainable sugar cane supply.



R23.8bn – total economic impact across all businesses¹⁰

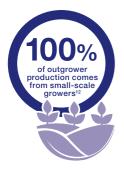
The following pages show just some of the ways each Illovo business contributes to the Group's total economic impact of R23.8bn across its six operating countries¹¹.

Illovo Sugar (Malawi) plo



Illovo Sugar (Malawi) plc (Illovo Malawi) is Malawi's primary sugar producer and miller. It operates two sugar estates in the country; Dwangwa and Nchalo, together producing raw and refined sugar, as well as a range of speciality sugars.

In 2016/17, Illovo Malawi produced 240,000 tonnes of sugar, more than half of which was sold into the domestic market. The company's total economic



impact represents 11% of Malawi's agricultural sector and 3.6% of the country's total GDP¹³.

A vital employer in Malawi

Illovo Malawi plays a vital economic role as one of the biggest employers in the country, with almost 10,000 direct employees and supporting another 2,000 jobs indirectly. Many of these jobs benefit the rural populations, (with all of the outgrower sugar cane supplied by 2,700 smallholder farmers), as well as the small local businesses that have grown around the sugar estates (e.g. transportation, security services, retail, etc.). Illovo Malawi has been recognised as an 'Employer of Choice' by the Employers Consultative Association of Malawi. The company is also involved in a project that female employees attended managerial/ leadership training in 2016/17 14

supports outgrowers through the Phata Sugarcane **Outgrowers Cooperative** which is funded through EU, UK and Scottish aid in partnership with Agricane. Illovo Malawi buvs the cane grown from this smallholder farmer-owned organisation as well as helping it to attain Fairtrade accreditation. The cooperative is now thriving and debt-free, producing approximately 56,000 tonnes of sugar cane in 2017, which is helping give uplifts in income to its 1,130 farmers and improve food security¹⁵.

Maragra Açúcar SA (Mozambique)



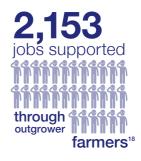
Maragra Açúcar SA (Maragra) is one of four major sugar producers in Mozambique with a combined industry production capacity of more than 380,000 tonnes of sugar per annum.

In 2016/17, 61% of sales of sugar were in the domestic market and Maragra's total economic impact was equivalent to approximately 2.7% of Mozambique's agricultural sector¹⁶.



Support for smallholder farmers

Following the devastating floods in 2000, Illovo has invested heavily to rehabilitate the land and support smallholder farmers. Maragra is responsible for implementing the Maragra Smallholder Sugarcane Development Project (MSSDP) - an EU funded initiative which is rehabilitating marginal, flood-prone land through better flood defences and drainage, so it can be made available for smallholder farming. In order to ensure that sugar cane fields do not reduce households' food security, the MSSDP is also helping establish 460 hectares of land for food crops. The project has recently introduced the 'MoneyMaker Max' treadle foot-pump to demonstrate



how technologies can help farmers increase their productivity as well as rely less on rainfall. Maragra has also partnered with the UK's DFID backed Climate Resilience Infrastructure Development Facility (CRIDF) to reduce flood vulnerability along the Incomati floodplain. CRIDF's expertise has helped enable more holistic flood risk management and improve resilience to climate change for both outgrowers and their communities.

Illovo South Africa (Pty) Ltd

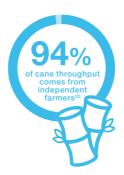


Illovo South Africa (Pty) Ltd (Illovo SA) is South Africa's largest sugar producer, producing approximately 30% of the country's total sugar production.

The company owns and operates three agricultural estates, four sugar mills, one sugar refinery, six off mill-site warehouses, three downstream processing plants and holds a 50% share in an alcohol distillery. 99% of sugar sales were to the domestic market in 2016/17¹⁹.

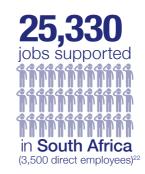
Supporting indigenous farmers and Fairtrade

Illovo SA has worked hard to address some of the country's greatest national challenges; namely, rural poverty and the development of indigenous growers. Illovo SA offers



comprehensive technical, financial and capacitybuilding support to farmers on restituted land returned to previously dispossessed indigenous farmers. It also commits to meeting or exceeding the target score in the Broad-Based Black **Economic Empowerment** (BBBEE) categories of Land Ownership, Enterprise Development and Socio-Economic Development. In its BBBEE assessment, Illovo SA

scored the maximum points on Enterprise Development, in part due to its dedicated resources to help indigenous arowers become sustainable sugar cane farmers. Illovo SA also supports the set-up of outgrower co-operatives, encouraging and helping them to acquire Fairtrade accreditation, and helping with the day-to-day management of their farms. Of the seven co-operatives that Illovo SA supports. two to date have received Fairtrade accreditation²¹.



Ubombo Sugar Limited (Swaziland)

Ubombo Sugar Limited (Ubombo) is one of three sugar producers in Swaziland and accounts for 38% of the country's sugar production, producing 215,000 tonnes of sugar in 2016/17.

The company operates an agricultural estate, factory and sugar refinery, and produces raw and refined sugar. Ubombo Sugar's total economic impact is the equivalent of roughly 6.1% of Swaziland's GDP



is provided from renewable sources primarily bagasse²³

and a significant percentage of Swaziland's agricultural sector²⁴.

Partnering to create economic and social value

Ubombo's Outgrower Project in partnership with the St Phillips Catholic Mission is a good example of the shared value approach that Illovo has adopted in its socioeconomic investments. Ubombo leased 450 hectares of land from the Catholic Church to set up a viable greenfield irrigated cane farming enterprise. Despite a tight timescale, Ubombo delivered this project on time and within budget to create an irrigated farm which supplied roughly 45,000 tonnes of cane in the 2016 season. Not only did this deliver value for the business but there were also significant benefits to



the community: 95% of employees came from the surrounding community; a reliable and clean water supply was created for residents, schools and a clinic; while the re-establishment of a vegetable garden now feeds children at the local orphanage and school as well as making fresh vegetables available to the local community²⁶.



30-33 "Kilombero Sugar Company Socio-Economic Impact Assessment", Corporate Citizenship (2017)

Kilombero Sugar Company Limited (Tanzania)

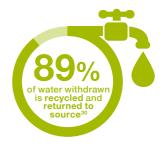
Kilombero Sugar Company Limited (Kilombero) is the largest sugar and agro-industrial company in Tanzania, contributing 42% of the country's sugar production.

The company operates two agricultural estates and sugar mills, as well as an ethanol plant, located in the Kilombero Valley. Kilombero produced more than 130,000 tonnes of sugar in 2016/17²⁷.

12.5 million
litres of ethanol produced,
accounting for
11%
of revenue

Safeguarding employee and grower well being

Kilombero has invested significantly in safety training over the past year. in line with Illovo's overall objective to provide a safe working environment for all employees and stakeholders. Kilombero's safety record measured against the frequency rate of Lost-Time Injuries (LTI) has fallen significantly by 30% as a result29. In the community, Kilombero's investment objectives are largely directed at growers but also benefit wider communities. The company co-founded the Kilombero Community Charitable Trust, which invests in outgrower infrastructure, water, health and education. Approximately 3,500 outgrower employees are estimated to benefit from the hospital on the



company's estate which also benefits over 35,000 paving community members³¹. The company provides housing, benefitting 1,864 employees and 5,750 dependents in 2016/1732. Other investments include two health clinics, a 90-bed hospital, two police stations and two primary court buildings in the townships surrounding Kilombero's two sugar factories. These are estimated to benefit 20,000 people, both in and outside the estate community³³.



Zambia Sugar Plc



Zambia Sugar Plc (Zambia Sugar) is the country's leading sugar producer, accounting for about 83% of the country's sugar production.

From the 360,000 tonnes of sugar it produced in 2016/17, about half of the sales were in the domestic market, with other African and international markets accounting for the remainder. Zambia Sugar operates the largest



capacity factory within the Illovo Sugar Africa Group, and across the continent, based at Nakambala. Zambia's total economic impact is the equivalent of approximately 18.6% of the size of Zambia's agricultural sector³⁵.

Boosting rural economies

Approximately 85% of Zambia's rural population rely on agriculture for their livelihoods³⁶. As the largest agricultural producer in the country, Zambia Sugar is working with partners on a number of shared value programmes that aim to tackle some of the key issues faced by local communities. Examples of these programmes include: partnering with a global bank on developing the capacity building skills of smallholder farmers; developing skills of individuals on estates for income generating activities



such as tailoring and carpentry; and a programme to improve financial literacy among employees. Zambia Sugar provides agronomy extension services to smallholders, including training on Fairtrade and the SusFarMS environmental management system. It also provides outgrowers with resource mobilisation, such as the provision of water supply infrastructure.

Germains Seed Technology

Germains Seed
Technology develops
innovative industryleading conventional and
organic seed solutions.
Specialising in seed
priming, pelleting,
film coating, seed
health and polymers,
Germains offers over 70
conventional and organic
seed treatments.

The company has 200 employees operating out of six manufacturing units and four research and development facilities in

sugar beet and horticulture distributed seeds processed by Germains

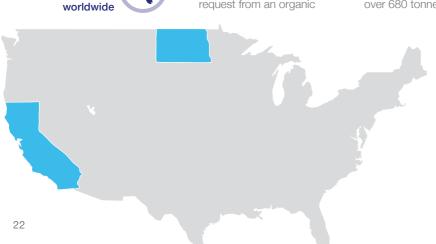
North America and Europe. Most notably, Germains revolutionised how sugar beet was planted by introducing one of the first seed pellet technologies to the agriculture industry.

Organically combating bacterial disease

A key recent success for Germains has been around the increasing need to supply organic seed technology solutions. As the largest single organic market in the world, the USA is seeing increasing consumer demand for organic produce. However, organic farmers face significant challenges in keeping their crop infestation free. In particular, an infection of bacterial leaf spot can cause complete crop failure in organic baby leaf crops. In response to a bespoke request from an organic

28% reduction in greenhouse gas emissions in EU operations since 2014

grower, Germains' Research and Development team in California developed ProBio® gopure® – a new organic process to remove seed borne pathogens from beet, Swiss chard and coriander seeds. This product has been very successful since it was commercially launched with Germains having treated over 680 tonnes.



Vivergo Fuels

Vivergo Fuels is the UK's largest and Europe's second largest producer of bioethanol; a low-carbon renewable transport fuel which is blended with petrol.

Operating from its plant in East Yorkshire, Vivergo processes 1.1 million tonnes of feed wheat sourced from nearly 900 UK farms to produce up to 420 million litres of bioethanol as well as 500,000 tonnes of animal feed.

Reducing the UK's vehicle carbon footprint

Bioethanol plays a key role in the de-carbonisation of the transport sector and offers the UK immediate opportunities to reduce carbon emissions from vehicles. Vivergo's bioethanol represents approximately





60% of greenhouse savings against standard petrol, the equivalent of taking 180,000 cars off the road.

Supporting British farmers

As the largest single production site for protein rich animal feed, Vivergo's domestic supply to dairy farmers reduces their reliance on imports; offering

them a reliable, traceable and high quality supply of animal feed. Vivergo is also the single biggest buyer of feed wheat in the UK, which provides a ready domestic market for the UK's wheat surplus. Without Vivergo, wheat farmers would need to export up to 3 million tonnes per year, at a £10 per tonne loss.

AB Sugar

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