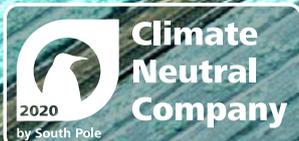




Sourced, secured and shipped

**Our latest range of products for
the food and beverage sectors.**

February 2021



Modern global supply chain service provider

We're a modern provider of global supply chain services, steeped in history and experience, brimming with ideas and passion, and backed by technology and investment. Our purpose is to exert a positive economic and sustainable influence in our food, beverage and energy supply chains. To achieve this, we use our global networks and knowledge to manage the most sustainable, efficient and cost-effective movement of products.

Our global supply chain services

We don't just source products. We create value at every stage of the supply chain and geography that we work in, strategically managing risk and tailoring financing solutions, optimising freight, cutting costs and promoting sustainable practices. Please contact us if you or your team are interested in any of the following services.

Financing solutions

We offer a comprehensive range of complex financial solutions tailored specifically to trade flows, supporting and meeting our clients' requirements and strengthening our long-term partnerships.

Price risk management

We help mitigate financial risk by using derivatives to price in advance of trades and maximise value. This offers all the benefits of managing price risk through the futures market, without complications or constraints.

Corporate finance

With the largest global team of professionals dedicated to the sugar and energy markets, we offer a wide range of solutions through our financial and strategic advisory services to help our customers achieve superior performance.

Logistics and stock management

We identify supply chain efficiencies that can be seamlessly executed by our global teams and we provide a 'one stop shop' for all sugar and ingredient stock management needs, including the clearing, warehousing, financing and delivery of goods.

Market analysis & advisory

Through Czapp, our Analysis team shares their knowledge, news, views and forecasts on the world's sugar and ethanol markets. We now also offer analysis on dairy, freight, PET, wheat, corn and more.

Physical trading

Our deep knowledge of the global sugar and ingredients market enables us to provide strategy, management, and trading solutions to our global partners. We manage the challenges of executing long and complex supply chains so you don't have to.

Sustainability programme

Our sustainability programme VIVE, co-managed with Intellync, helps businesses to measure sustainability performance across their supply chains, and promotes continuous improvement. We measure, monitor and benchmark participant performance against global sustainability standards, fostering change through bespoke plans.

Czapp

At Czarnikow transparency comes as standard, and Czapp brings our expertise, top-class market content and analysis along with live price information and data into the palm of your hand. Available in Apple and Google Play stores, our new app has transformed our relationship with clients.



More information: www.czarnikow.com/services

Year-round, worldwide, high-quality products for the food and beverage sectors

GLOBAL SCALE AND REACH

Our established global network and deep product and market knowledge have earned us a successful track record in managing market volatility, product seasonality (with year-round supply) and supply chain complexities for the food and beverage sectors.

- > Around 80 product lines with a view to expansion
- > Around 5 million metric tonnes of products traded each year
- > Active in over 90 countries
- > Pioneers in sustainably sourced products (VIVE programme)
- > Year-round strategic sourcing expertise
- > Relationships with around 600 companies
- > Over 160 years of experience

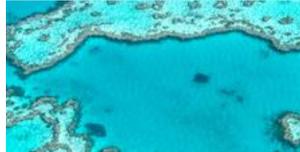
EXPANDING OUR CLIENT AND PRODUCT PORTFOLIO

Driven by our strong service ethos, the strategic sourcing and supply of complementary products is made on behalf of new and existing food and beverage clients. We are currently working on new product lines in flavourings and oils, and are always open to requests. If you don't see a specified product that you're looking for, please get in touch.

+
We also source and supply ethanol and biofuel products for the energy sector. More information: www.czarnikow.com/products/energy

1

Sustainable sugar (VIVE)

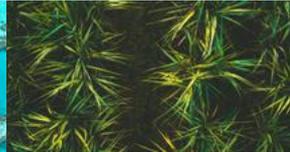


VIVE-verified sugar, fully traceable from farm to industrial user, including logistics and finance partners.

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Sugars



Bulk and packaged sugar products.

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3

Sweeteners and syrups



A mix of nutritive and high-intensity sweeteners and syrups.

Page 6

4

Fruit



Expanding range of fruit-based ingredients, sourced from all around the world.

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Dairy



Dairy-based powders, concentrates and butter.

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Preservatives and antioxidants



Food processing ingredients to extend shelf-life and retain flavour, colour and nutrients.

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Acidity regulators



Food processing ingredients used to adjust acidity (pH) to enhance food safety and flavour.

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Thickeners



Food processing ingredients used to improve mouth feel, product texture and consistency.

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Packaging



Resins and pre-formed packaging for industrial use.

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2. Sugars

PRODUCT	FORMAT	ORIGIN
REFINED (WHITE) SUGAR	25kg bags, 50kg bags, 1.2mt bags, bulk, bulk container	Worldwide
UNREFINED (RAW) SUGAR	Bulk	Worldwide
CASTER SUGAR	25kg-1mt bags	Worldwide
DARK MUSCOVADO SUGAR	25kg-1mt bags	Worldwide
DEMERARA SUGAR	25kg-1mt bags	Worldwide
DRY DEMERARA SUGAR	25kg-1mt bags	Worldwide
GRANULATED (BEET) SUGAR	50kg-1.2mt bags	Worldwide
GRANULATED (CANE) SUGAR	50kg-1.2mt bags	Worldwide
LIGHT BROWN (CANE) SUGAR	25kg-1mt bags	Worldwide
LIGHT MUSCOVADO SUGAR	25kg-1mt bags	Worldwide
ORGANIC (BROWN) SUGAR	50kg-1.2mt bags	Worldwide
ORGANIC (WHITE) SUGAR	50kg-1.2mt bags	Worldwide
SCREENED SUGAR	25kg-1mt bags	Worldwide



We offer sugar in 25kg bags, 50kg bags, 1mt bags, 1.2 mt bags, bulk tankers and bulk containers



>160
YEARS EXPERIENCE

We have established many long-lasting client relationships, building mutual knowledge and trust. For some clients we are considered an extension of their purchasing team. For others we have set up in new regions to manage bespoke requests. We look for synergies across our network – whether for sugar or brand-new areas – to ensure the correct quality and quantity of product is delivered on time with transparent pricing and service levels.

In the world of sugar we have 160 years of experience, making us a trusted partner of choice. With slow but increasing global demand, sugar exports are likely to increase from countries and regions such as Australia, Europe, and Thailand, which have modernised their sugar industry in recent years. Nonetheless, Brazil is likely to retain its status as the world's major producer and exporter.



More information and sources:
www.czarnikow.com/products/sugar

3. Sweeteners and syrups

PRODUCT	FORMAT	ORIGIN
NUTRITIVE SWEETENERS AND SYRUPS		
CRYSTALLINE FRUCTOSE	25-50kg bags	Asia/Europe
DEXTRROSE ANHYDROUS	25-50kg bags	Asia/Europe
DEXTRROSE MONOHYDRATE	25-50kg bags	Asia/Europe
HIGH FRUCTOSE CORN SYRUP	300kg drums/ flexitanks	Africa/Asia/Europe
LIQUID GLUCOSE	300kg drums/ flexitanks	Africa/Asia/Europe
MALTODEXTRIN	25-50kg bags	Asia/Europe
MALTOSE	300kg drums/ flexitanks	Asia/Europe
MODIFIED STARCH	25-50kg bags	Asia/Europe/N America
HIGH-INTENSITY SWEETENERS AND SYRUPS		
ACESULFAME POTASSIUM (K)	25-50kg bags	Asia/Europe
ASPARTAME	25-50kg bags	Asia/Europe
SODIUM SACCHARIN	25-50kg bags	Asia/Europe
SUCRALOSE	25-50kg bags	Asia/Europe
XYLITOL	25-50kg bags	Asia

1.71%

PROJECTED GLOBAL FOOD SWEETENER MARKET GROWTH (CAGR, 2020-2025)

Sweeteners enhance flavour and/or texture, making them popular in food and beverage products. Czarnikow is working to facilitate global physical trades in this exciting market, supporting clients to select the best options for their manufacturing requirements.

The food sweetener market is segmented by type: sucrose, starch sweeteners and sugar alcohols, and high-intensity sweeteners. We categorise our sweeteners into nutritive (naturally-derived) sweeteners and high-intensity sweeteners.



More information and sources:
[www.czarnikow.com/
products/sweeteners](http://www.czarnikow.com/products/sweeteners)



4. Fruit

PRODUCT	SPECIFICATION	BRIX	FORMAT	ORIGIN	CROP
CONCENTRATES					
APPLE	Deionised	72	Drums/flexitank/IBC	Asia/Europe	March to May & August to October
	Concentrate	70			
BANANA	Concentrate	30-32 & 40	Drums	Asia/S America	All year
BLUEBERRY	Concentrate	68	Drums	N America/ S America	October to January
CARROT	Concentrate	70	Drums	Europe	September to May
CHERRY SOUR	Concentrate	64-66	Drums/flexitank	Europe	June to August
GRAPE	Deionised	68	Drums/flexitank	Africa/Europe/ S America	February to April & September to October
	Concentrate	68 and 65 Colour level from 200-1500 White and red	Drums/flexitank		
LEMON	Concentrate	41.5-52.5	Drums	Europe/S America	All year
MANGO	Concentrate	28 various varieties	Drums	Africa/Asia/ N America	May to June
ORANGE	Concentrate	66-64	Drums/flexitank	Africa/Europe/ S America	August to January
PASSION FRUIT	Concentrate	50	Drums	Asia/S America	All year
PINEAPPLE	Deionised	72	Drums/flexitank	Africa/Asia/ S America	All year with main period April to May & November to January
	Concentrate	68 and 65			
TOMATO	Concentrate	36-38 cold break brix 30-32 hot/cold break 28-30 hot/cold break	Drums	Africa/Asia/Europe/ S America	February to March & August to October
PURÉES					
APPLE	Purée concentrate and purée SS	30-32, 10-12	Drums	Africa/Asia/Europe	March to May & August to October
APRICOT	Purée concentrate and purée SS	30-32, 9-12	Drums	Europe/S America	May to June & December to January
BANANA	Purée concentrate	20-21	Drums	Asia/S America	All year
GUAVA	Purée concentrate and purée SS	18-20, 20-22 and 14-16 Pink and white	Drums	Africa/Asia/ S America	June to August & February to May
MANGO	Purée SS	14-16	Drums	Africa/Asia/ N America	May to June & October to November
PEACH	Purée concentrate and purée SS	30-32 and min. 10	Drums	Africa/Europe/ S America	January to March & July to August
PEAR	Purée concentrate and purée SS	30-32, 10-13	Drums	Africa/Europe/ S America	February to April & July to October
PINEAPPLE	Purée SS	Min. 11	Drums	Africa/Asia/ S America	All year with main period April to May & November to January
ORANGE	Purée SS	11-13.5	Drums	Africa/Europe/ S America	August to January
STRAWBERRY	Purée concentrate and purée SS	16-18, 7-12	Drums	Africa/Europe/ S America	April to August

4. Fruit continued

PRODUCT	SPECIFICATION	BRIX	FORMAT	ORIGIN	CROP
NFCS					
APPLE	NFC	10-12	Drums	Europe	March to May & August to October
BLUEBERRY	NFC	10-11	Drums/flexitank	S America	October to January
CARROT	NFC	Min. 7	Drums/flexitank	Asia/Europe	September to May
MANGO	NFC	Min. 14	Drums	Africa/Asia/S America	May to June
ORANGE	NFC	Min. 10	Drums	Africa/Europe/S America	August to January
PASSION FRUIT	NFC	Min. 9-12	Drums	Asia/S America	All year
PEAR	NFC	Min. 11	Drums	Africa/Europe/S America	February to April & July to October
PINEAPPLE	NFC	Min. 11.2	Drums	Africa/Asia/S America	All year with main period April to May & November to January
STRAWBERRY	NFC	Min. 7	Drums	Europe/S America	April to August
CELLS AND SACS					
LEMON	Cells	Min 6.5-9.5	Drums	Europe/S America	All year
MANDARIN ORANGE	Sacs	2-4, 4-6, 6-8, 8-12 Drain weight 60% and 70%	Drums/18 kg tins	Asia	All year with main crop November to January
ORANGE	Cells	Min 8.1	Drums	Africa/Europe	November to January
PIECES, DICES, CRUSH AND SACS					
ALOE VERA	Crush	Aseptic 3-6 mm and 5-8 mm	Various	Asia	All year
APRICOT	Dices	Aseptic 6x6, 10x10	Drums	Europe	May to June
BANANA	Whole, halves, slices, dices	IQF	Drums	S America	All year
MANGO	Dices	Aseptic 10x10	Various	Asia/N America	May to August
NATA DE COCO	Crush and dices	Aseptic 10x10	Various	Asia	All year
PEACH	Dices	Aseptic 6x6, 10x10	Drums	Europe	June to August
PINEAPPLE	Dices	Aseptic 10x10	Various	Asia	All year with main period April to May & November to January
	Crush	Aseptic min. 11	Various	Asia	
	Fine crush	Min. 11 DW 70%, min. 4-7 mm	Various	Asia	



We are also able to source a full variety of compounds, emulsion/base and essential oils, tailored to your requirements

4. Fruit continued

FRUIT CALENDAR

MAIN FRUITS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
ORANGE	■							■	■	■		
APPLE			■	■	■	■			■	■		
TOMATO		■	■					■	■	■	■	
PINEAPPLE	■	■	■	■	■	■	■	■	■	■	■	■
MANGO					■							
LEMON	■	■	■	■	■	■	■	■	■	■	■	■
GRAPE		■	■	■					■	■		

OTHER FRUITS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
ALOE VERA	■	■	■	■	■	■	■	■	■	■	■	■
APRICOT	■				■							■
BANANA	■	■	■	■	■	■	■	■	■	■	■	■
BLUEBERRY	■									■	■	■
CARROT	■	■	■	■	■				■	■	■	■
CHERRY SOUR						■	■	■				
GUAVA		■	■	■	■	■	■	■				
MANDARIN ORANGE	■	■	■	■	■	■	■	■	■	■	■	■
NATA DE COCO	■	■	■	■	■	■	■	■	■	■	■	■
PASSION FRUIT	■	■	■	■	■	■	■	■	■	■	■	■
PEACH	■	■	■			■	■	■				
PEAR		■	■	■	■		■	■	■	■		
STRAWBERRY				■	■	■	■	■	■			

■ MAIN CROP PERIOD ■ SHORT SUPPLY

Calendar based on typical crop seasons.

46.3 BN LITRES

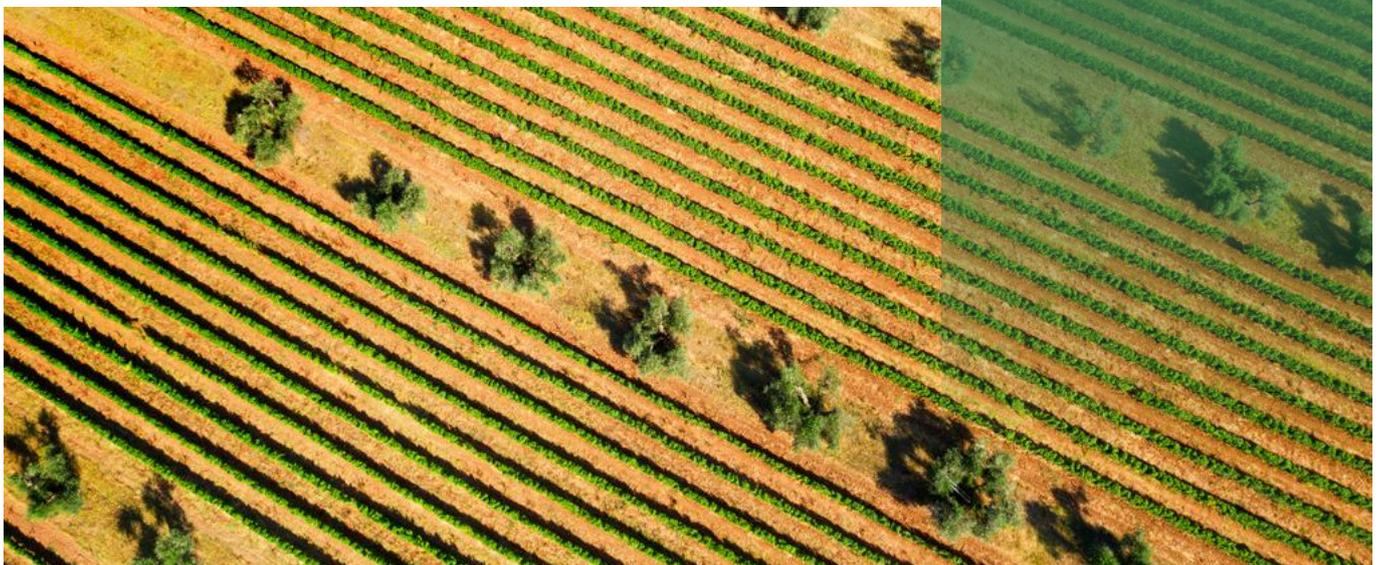
GLOBAL FRUIT JUICE MARKET IN 2019

In 2019, the global fruit juice market reached a volume of 46.3 billion litres and is forecast to grow steadily over the next five years. The industry is transforming, driven by more natural products as end-consumers recognise the health benefits from drinking a daily glass of juice.

With fruit commodities markets experiencing greater volatility year by year and large-scale supply chain disruption, Czarnikow's goal is to provide tools to make better informed choices, driving value through flexible and innovative commercial structures across the global market.



More information and sources:
www.czarnikow.com/products/fruit



5. Dairy products

PRODUCT	FORMAT	ORIGIN
ANHYDROUS MILK FAT	210kg drums, 1mt spacecrafts (IBC)	Europe/Oceania
BUTTER	25kg blocks	Europe/Oceania
FULL CREAM MILK POWDER	25kg bags	Europe/Oceania
SKIMMED MILK POWDER	25kg bags	Europe/Oceania



>US\$10 BILLION
GLOBAL POWDERED MILK MARKET SIZE

This multi-billion dollar market includes many types of dried milk such as skimmed milk powder, whole milk powder, and milk protein.

Czarnikow is involved in the supply chains of dairy powders, ensuring that the nutrition of dairy can be reached in countries and regions that do not have sophisticated chill-chain logistics, or the capacity to meet their dairy needs locally.

+
More information and sources:
www.czarnikow.com/products/dairy



6. Preservatives and antioxidants

PRODUCT	FORMAT	ORIGIN
ASCORBIC ACID	25-50kg bags	Asia/Europe
MONOSODIUM GLUTAMATE	25-50kg bags	Asia/Europe
POTASSIUM SORBATE	25-50kg bags	Asia/Europe
SODIUM BENZOATE	25-50kg bags	Asia/Europe
CALCIUM PROPIONATE	25-50kg bags	Asia

>US\$20 BILLION
**COMBINED GLOBAL
 MARKET VALUE OF
 LEADING
 PRESERVATIVES/
 ANTIOXIDANTS**

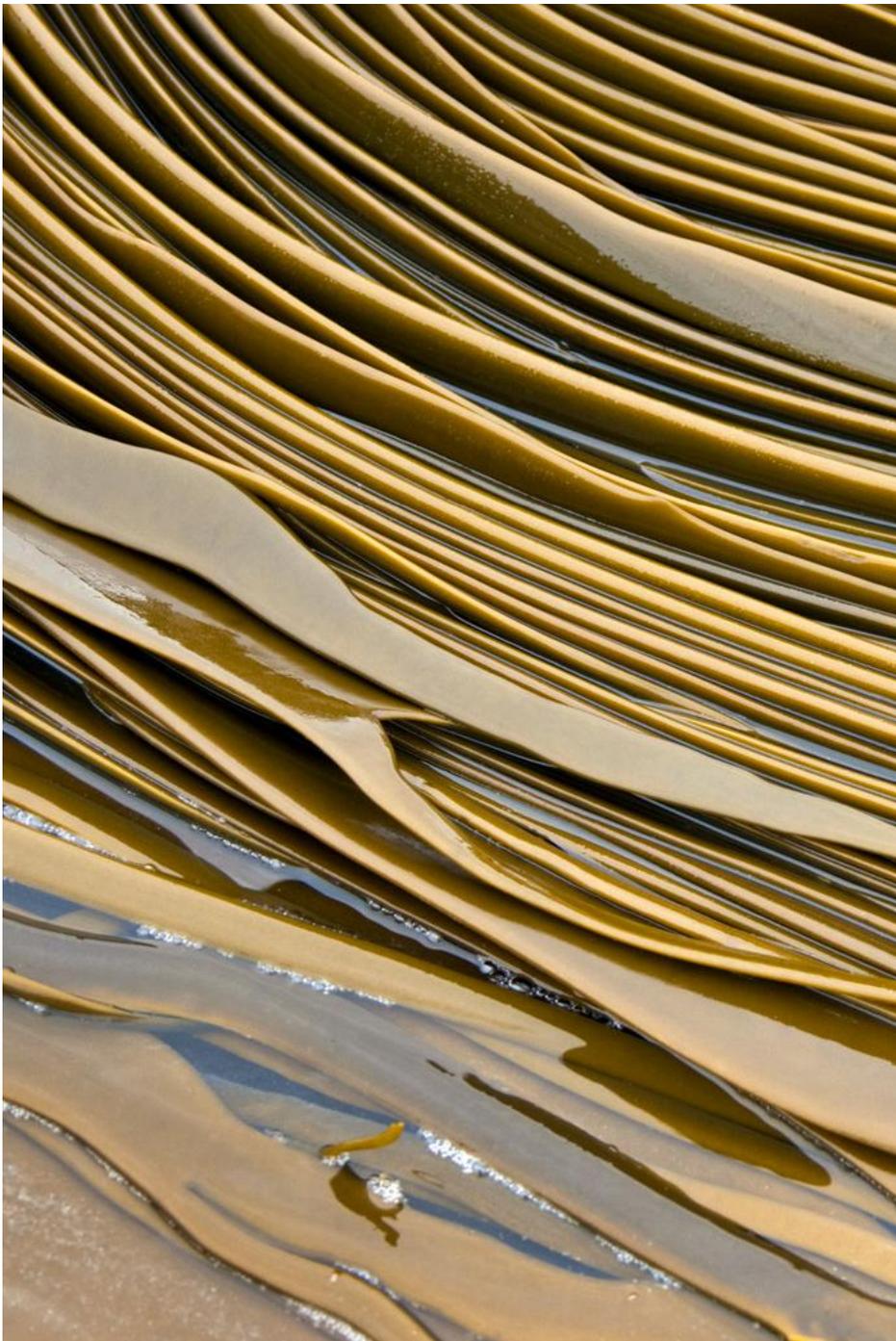
The ascorbic acid market is the second largest by value in our current range, estimated to be worth US\$8.97 billion. Growth has been influenced by the increasing inclusion of vitamin C in food and beverages for fortification, as well as developments in the pharmaceutical industry. The Asia-Pacific region also dominates this market with over a 40% global share.

FUN FACT

Monosodium Glutamate (MSG) was first prepared in isolation in 1908 by Japanese biochemist Kikunae Ikeda, who was trying to isolate and duplicate the savoury taste of kombu, the edible seaweed used as a base for many Japanese soups. He described its flavour as 'umami', which is now one of the five major tastes.



More information and sources:
www.czarnikow.com/products/preservatives-antioxidants



7. Acidity regulators

PRODUCT	FORMAT	ORIGIN
CITRIC ACID ANHYDROUS	25-50kg bags	Asia/Europe/S America
CITRIC ACID MONOHYDRATED	25-50kg bags	Asia/Europe/S America
MALIC ACID	25-50kg bags	Asia/Europe/S America
SODIUM CITRATE	25-50kg bags	Asia/Europe/S America

>2 MMT*
OF CITRIC ACID MANUFACTURED EVERY YEAR

Citric acid holds an impressive 57% of market share in the acidity regulators category. The citric acid market is directly influenced by increased use of food additives in the processed food industry, driven by the popularity of ready meals, concerns over food waste and high consumer demand for safe ingredients in food and beverage products. Increasing application in the pharmaceutical and personal care industries is also augmenting market demand for citric acid products.

The Asia-Pacific region leads the production of citric acid, with Europe and North America driving demand due to their love of snacks and processed foods. Demand is set to increase in China, Eastern Europe and Brazil.

*Million metric tonnes (MMT)

+
 More information and sources:
www.czarnikow.com/products/acidity-regulators



8. Thickeners

PRODUCT	FORMAT	ORIGIN
CARBOXYMETHYL CELLULOSE (CMC)	25-50kg bags	Asia/Europe
NATIVE CORN STARCH	25-50kg bags, 1,000kg bags	Asia/Europe
PECTIN	25-50kg bags	Asia/Europe
TAPIOCA STARCH	25-50kg bags, 1,000kg bags	Asia/Europe
XANTHAN GUM	25-50kg bags	Asia/Europe



47.3 MMT*

EXPECTED GROWTH OF WORLDWIDE STARCH MARKET

Corn starch currently accounts for 80% of global starch production, with around 41% used in the food and beverage sector. With an estimated market size in 2019 of US\$17.02 billion, and a CAGR of 8.2%, it is forecast to reach US\$29.39 billion by 2026. This stellar expansion is underpinned by a demand for sweeteners, for which corn starch is a fundamental ingredient. North America is the largest corn starch producer and, equally, commands the largest market share with a forecast CAGR of 8.57%. The Asia-Pacific region is also expected to see growth, owing to the increase in demand for snack products.

*Million metric tonnes (MMT)



More information and sources:
www.czarnikow.com/products/thickeners

9. Packaging

PRODUCT	FORMAT	ORIGIN
PET RESIN	1.1mt bags, Bulk	Asia
PAPER	Jumbo rolls	Africa/Asia
PP RESIN	Jumbo bags	Asia



70%

OF SOFT DRINKS* ARE PACKAGED IN PET PLASTIC BOTTLES

PET (Polyethylene terephthalate) resin is the most common polymer resin of the polyester family. Most global PET production (60%) goes to the textile industry, with around 30% of it being used to create plastic bottles. PET is the most widely recycled plastic across the world, and is also supplied in recycled format (rPET).

*Carbonated drinks, still and dilutable drinks, fruit juices and bottled water



More information and sources:
www.czarnikow.com/products/packaging



About the images

COVER

Micro view of agricultural landscape.

PAGE 2

Macro image of aloe vera.

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Micro view of the Great Barrier Reef.

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Micro view of sugar cane field.

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Stevia leaf.

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Micro view of fruit trees.

PAGE 10

Micro view of grazing cows.

PAGE 11

Macro image of seaweed.

PAGE 12

Macro image of orange slice.

PAGE 13

Micro view of corn seedlings.

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Macro image of empty mineral water bottles for recycling.

PAGE 15

Macro image of tomato pulp.

Macro trends and micro markets

Images and case studies used in the document symbolise the depth and quality of our market understanding as well as our ability to stand back and look at the bigger picture. We combine both to enhance client service and recommendations.



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**REGIONAL OFFICES AND A
LOCAL PRESENCE IN:** Bahrain,
Bangkok, Dar Es Salaam, Dubai,
Guangzhou, Hyderabad, London,
Mexico City, Miami, Milan, Nairobi,
São Paulo, Singapore, Tel Aviv,
Trinidad and Vietnam.

15 COUNTRIES

We are represented in 15 countries around the world and operate in all key sugar-producing regions, trading around 10% of global sugar volumes.



More information:
www.czarnikow.com/contact