



Deltafina S.p.A.  
Universal Leaf Europe

**CORESTA**  
**Agro/Phyto (AP01) Meeting**

**Brufa di Torgiano, Italy**  
*October, 14, 2013*





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**CORESTA**  
**Agro/Phyto (AP01) Meeting**

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## DHT-Germany

(Cigar Homogenized Wrapper and Binder Operation)

## Deli-HTL – The Netherlands

(Filler Sheet Operation in Eindhoven)

## ULT Poland

(FCV, BU and DAC)

## ULT Hungary

(FCV and BU)



## HQ of Deltafina (Sales, Operations, Admin & Finance)

- Italian Tobaccos processing in Assisi (FCV; BSO) and Francolise (BLY)
- Spanish operations and other EU origins tobacco trade

## HQ of 'European coordination'

A close-up photograph of several large, green tobacco leaves with prominent veins, set against a dark background. The leaves are slightly out of focus, creating a sense of depth.

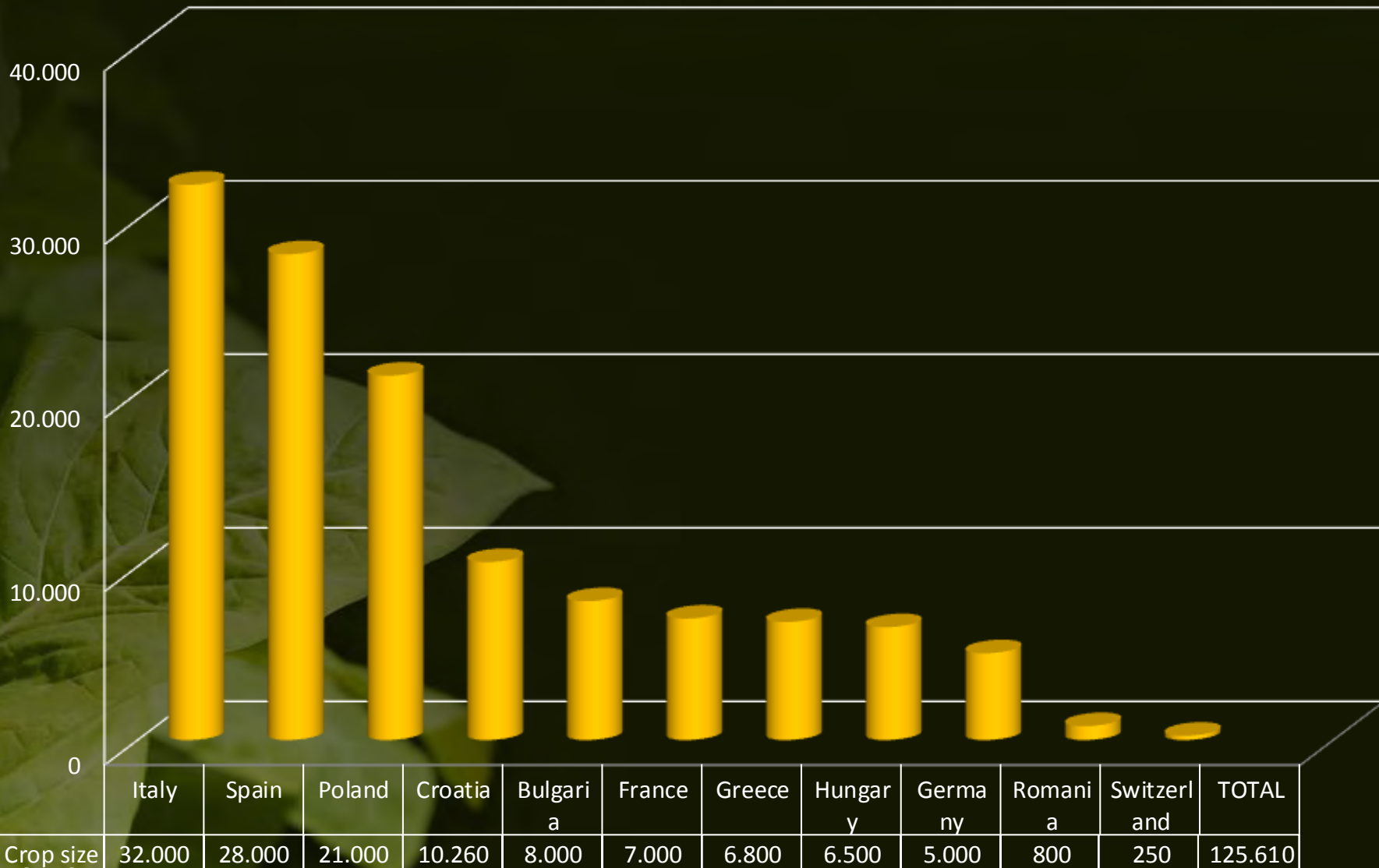
# European Tobacco

## General Information

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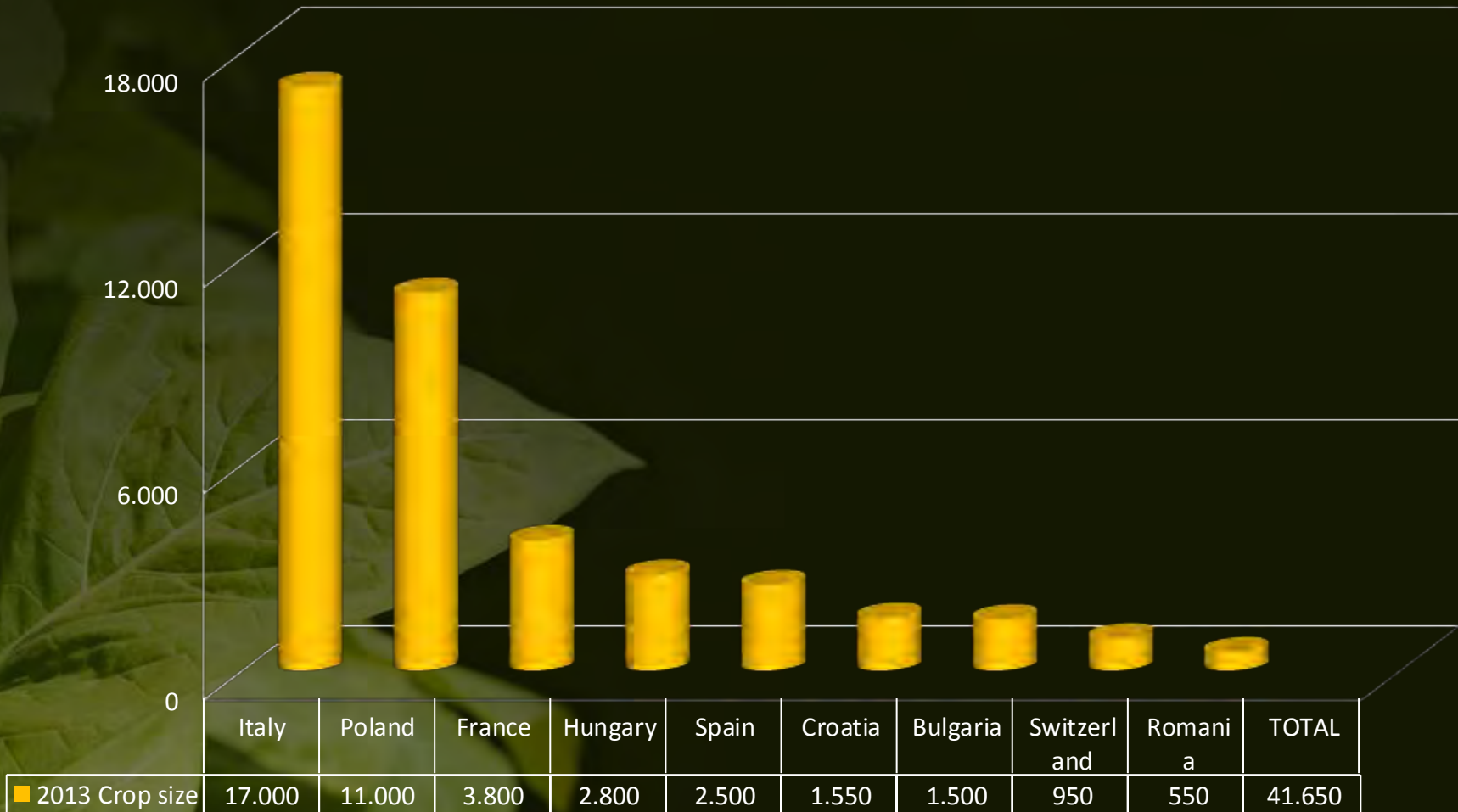


# European Production: FCV 2013E



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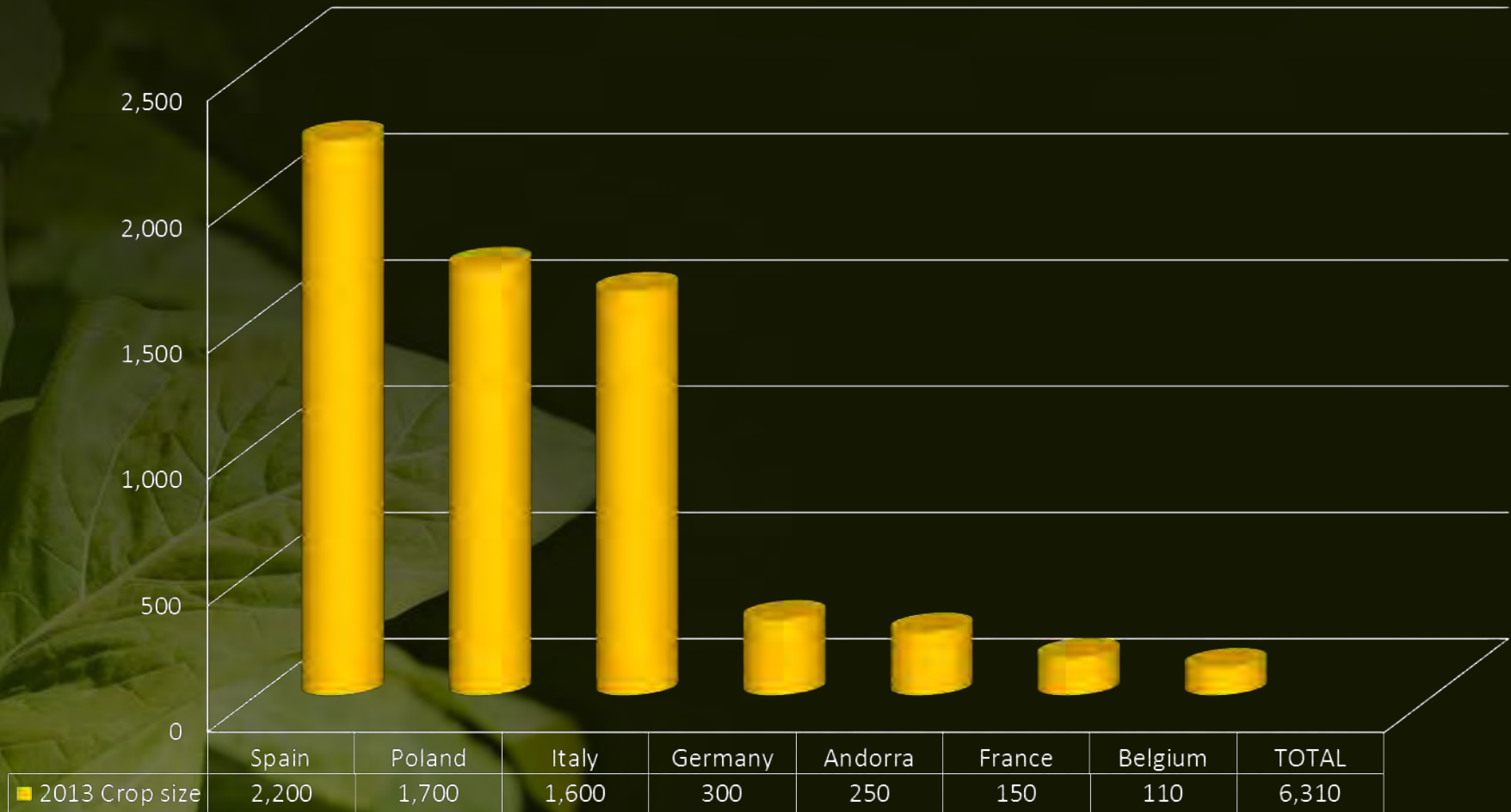
# European Production: BURLEY 2013E



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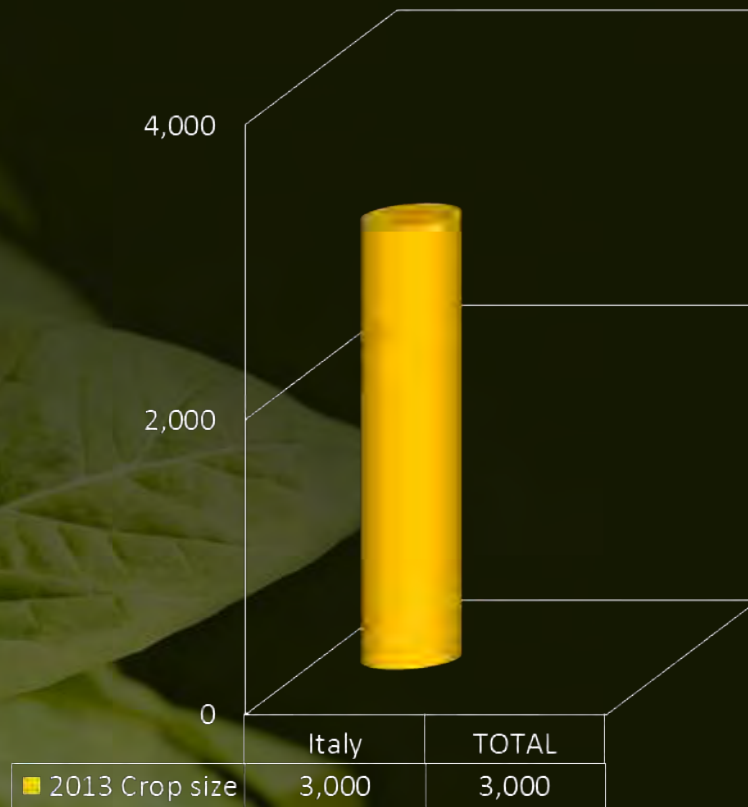


# European Production: DAC 2013E



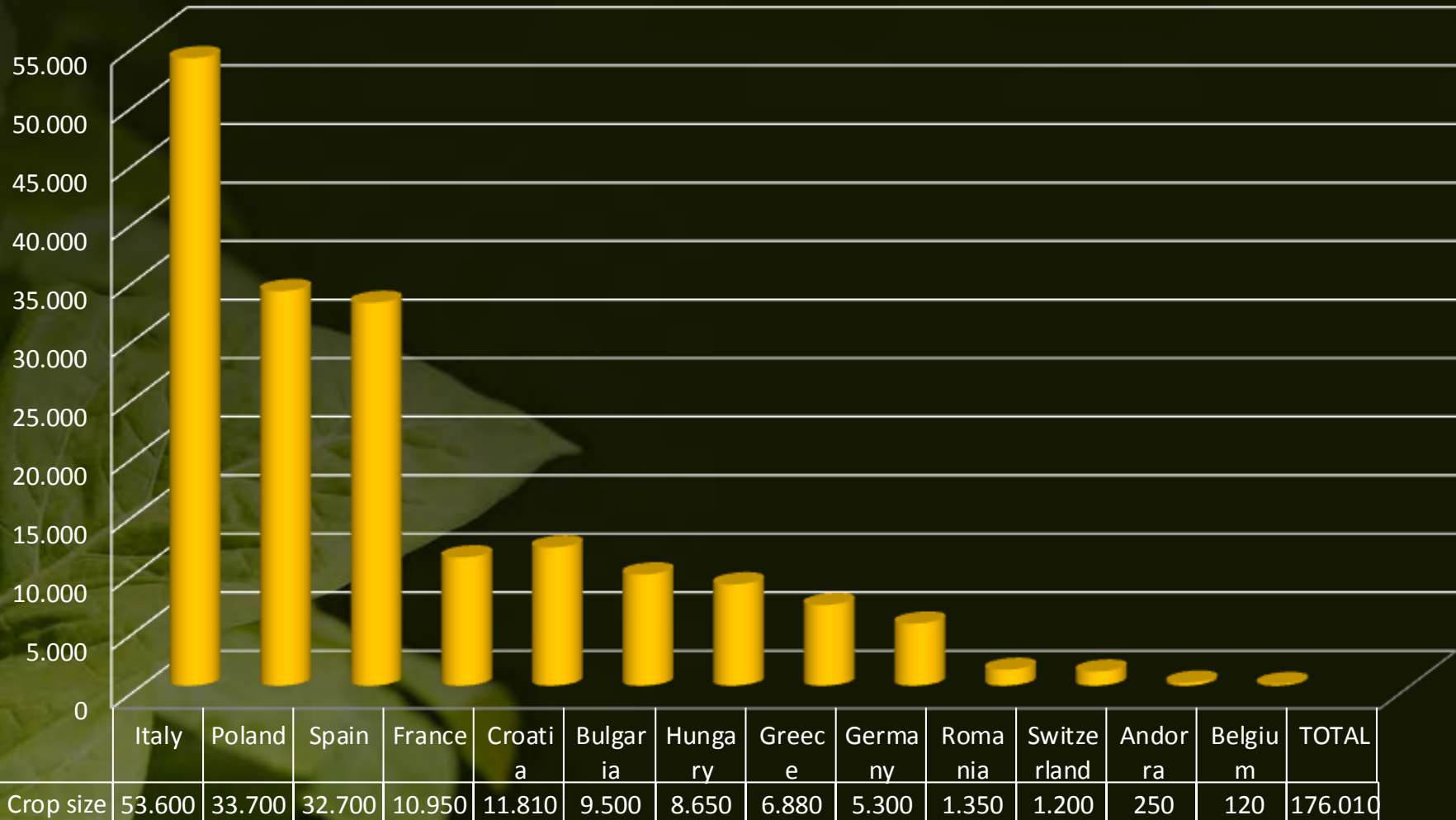
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# European Production: DFC 2013E





# European Production: TOTAL 2013E



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# ITALY

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# Italy - Growing Areas



# Italy – Crop Calendar

Acitivity	FCV												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Seed Beds			█	█	█	█	█	█	█	█	█		
Transplanting					█	█	█						
Harvesting							█	█	█	█	█	█	
Buying	█	█	█	█							█	█	█
Processing		█	█	█	█	█	█	█	█	█	█		

Acitivity	BURLEY												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Seed Beds		█	█	█	█	█	█						
Transplanting				█	█								
Harvesting						█	█	█	█	█	█		
Buying	█	█	█	█								█	█
Processing		█	█	█	█	█	█	█	█	█	█		

## ➤ Farmers

- *Total number of farmers – 3,200 around*
- *3 National Farmers' Unions*
- *8 Regional Producers' Groups*

## ➤ Processors/Tobacco Contractors

- *PMI*
- *Deltafina*
- *TTI*
- *CTV*
- *MST*
- *Some smaller operators (South)*

## ➤ Regulatory / Control Organisations

- *Ministry of Agriculture*
- *AGEA (Agency for Agriculture Payments & Controls)*

# Italy - Crop Volumes Evolution 2011 -2013E



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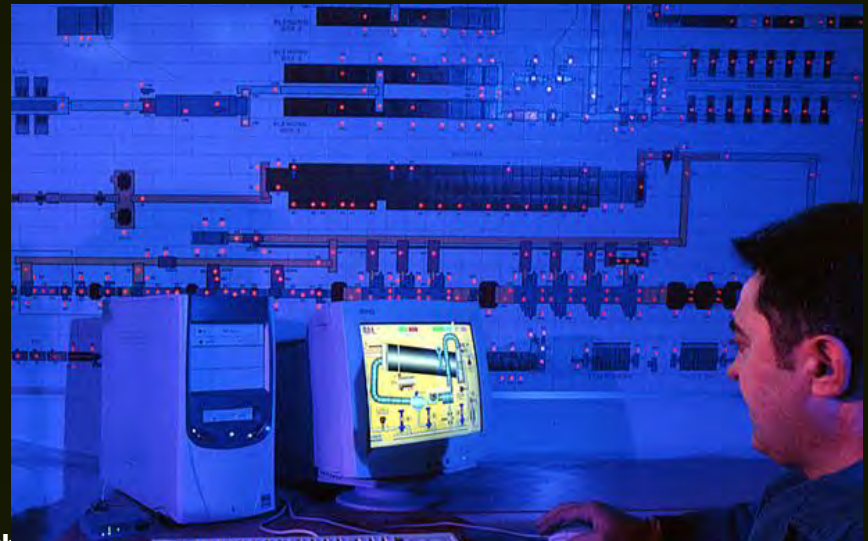


# Italy - Number of Growers Crop 2011-2013



# «Assisi» Factory

- “Assisi” factory operates since 1982
- Indoor area 32,000 sqm
- Average hourly throughput 11,000 kg/h
- Multi-sep technology has been installed
- Wide use of electronics to facilitate plant management
- Devices to remove NTRM along the line
- Main variety processed: Flue Cured
- ISO 9001 and 14001 certified



# «Francolise» Factory

- “Francolise” factory operates since 1971
- Indoor area 24,000 sqm
- Average hourly throughput 8,500 kg/h
- First plant in Europe to have installed Multi-sep technology
- Located in the middle of Burley production area and close to the main southern Italy ports
- Devices to remove NTRM and systems specially designed for strings eradication
- Main variety processed: Burley
- ISO 9001 and 14001 certified





# «BSO» Plant

- The blending facility was established in 1995
- The plant covers 6,600 sqm of processing area
- Synergies with stemmery personnel
- Latest technology is utilized for blending and casing
- Wide use of electronics to assure exact ratios during blending process



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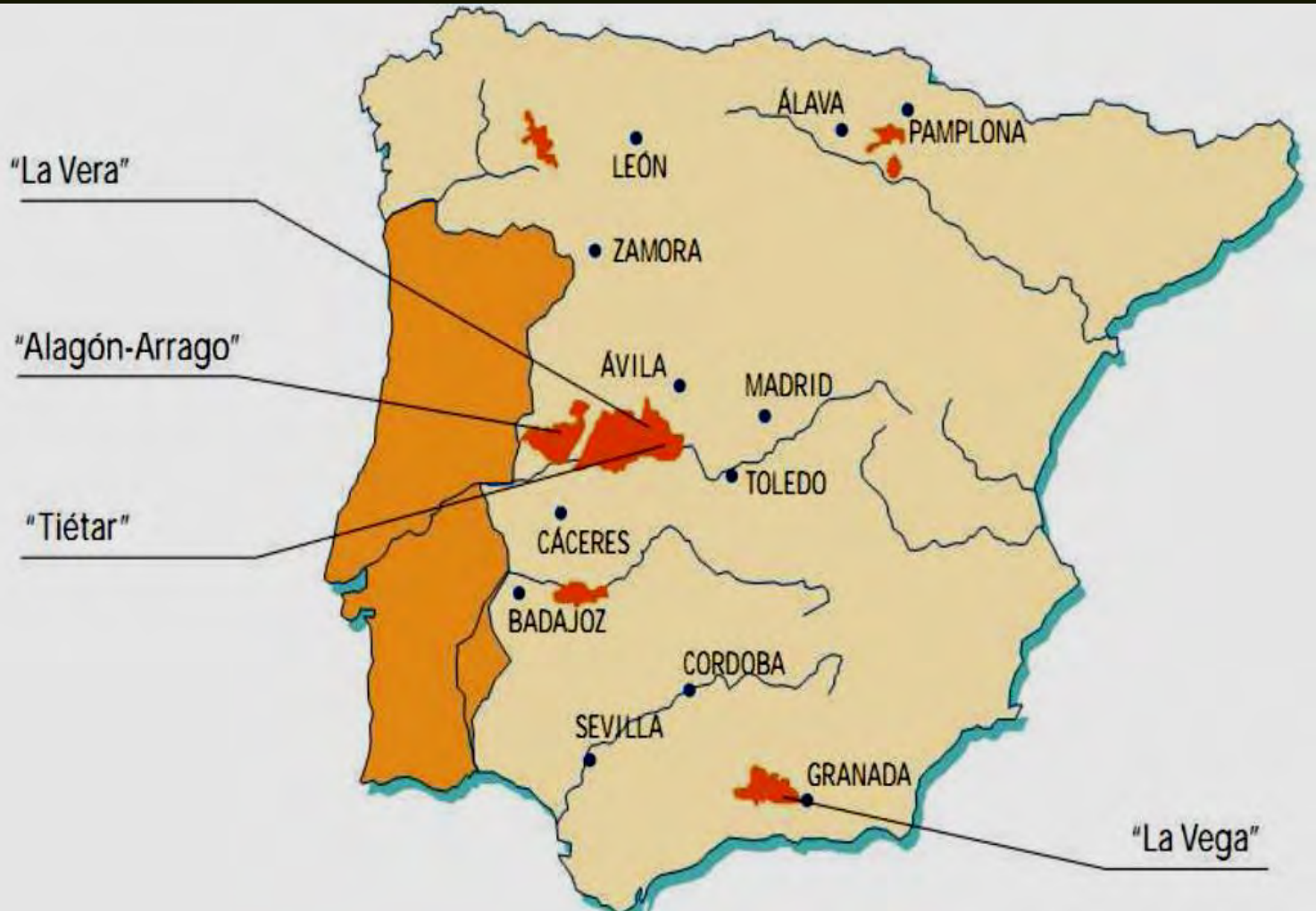
# SPAIN



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# Spain - Growing Areas



# Spain – Crop Calendar

Acitivity	FCV											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Seed Beds			█	█	█	█	█	█	█	█	█	█
Transplanting					█	█	█					
Harvesting								█	█	█	█	█
Buying	█	█	█	█	█					█	█	█
Processing	█	█	█	█	█	█	█	█	█	█	█	█

Acitivity	BURLEY											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Seed Beds		█	█	█	█	█	█					
Transplanting				█	█	█						
Harvesting							█	█	█			
Buying	█	█	█	█	█						█	█
Processing		█	█	█	█	█	█	█	█	█	█	█

## ➤ Farmers

- *Total number of farmers – 2,100 around*
- *2 National Farmers' Unions*
- *5 Regional Producers' Groups*

## ➤ Processors/tobacco contractors

- *Cetarsa*
- *Deltafina*

## ➤ Regulatory / control organisations

- *Ministry of Agriculture*
- *Junta de Extremadura (Regional government organization)*



# Spain - Crop Volumes Evolution 2011 -2013E



# Spain - Number of Growers Crop 2011-2013



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# HUNGARY

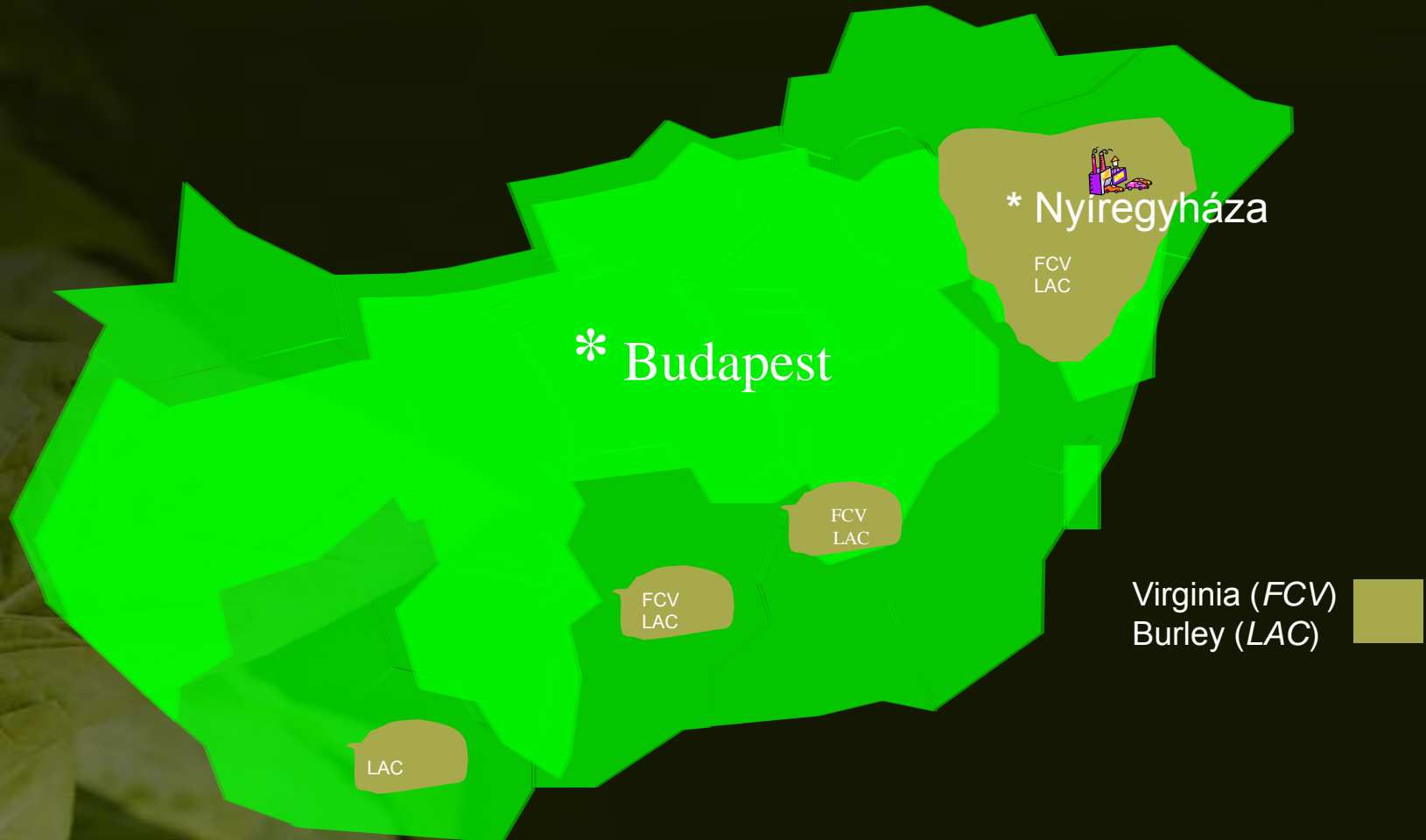


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# Hungary - Growing Areas





# Hungary – Crop Calendar

Acitivity	FCV												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Seed Beds			█	█	█	█	█	█	█	█	█	█	
Transplanting					█	█	█	█					
Harvesting							█	█	█	█	█	█	
Buying									█	█	█	█	█
Processing	█	█	█	█							█	█	█

Acitivity	BURLEY												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Seed Beds		█	█	█	█	█	█	█	█	█			
Transplanting				█	█	█							
Harvesting							█	█	█	█	█	█	
Buying	█	█	█	█								█	█
Processing				█	█	█	█						

# Hungary - Green Tobacco Sector

## ➤ Farmers

- *Total number of farmers – 1100 around*
- *1 Hungarian Tobacco Farmers' Association*
- *1 Producers' Groups (for ULT Hungary)*

## ➤ Processors/tobacco contractors

- *ULT Hungary Pte. Ltd.*
- *Dofer Pte. Ltd.*

## ➤ Regulatory / control organisations

- *Ministry of Agriculture*
- *ARDA (Agency for Rural Development & Agriculture)*

# Hungary - Crop Volumes Evolution 2011 -2013E



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# Hungary - Number of Growers Crops 2011-2013E





# ULT Hungary Factory NYREGYAZA

- **Site area**  
**105,000 sqm**
- **Storage area**  
**25,000 sqm**
- **Processing area**  
**6,200 sqm**
- **Yearly processing**  
**8,300 tons**
- **Average hourly throughput**  
**9,400 kg/h**
- **Varieties processed**  
**FC – Burley**





# POLAND

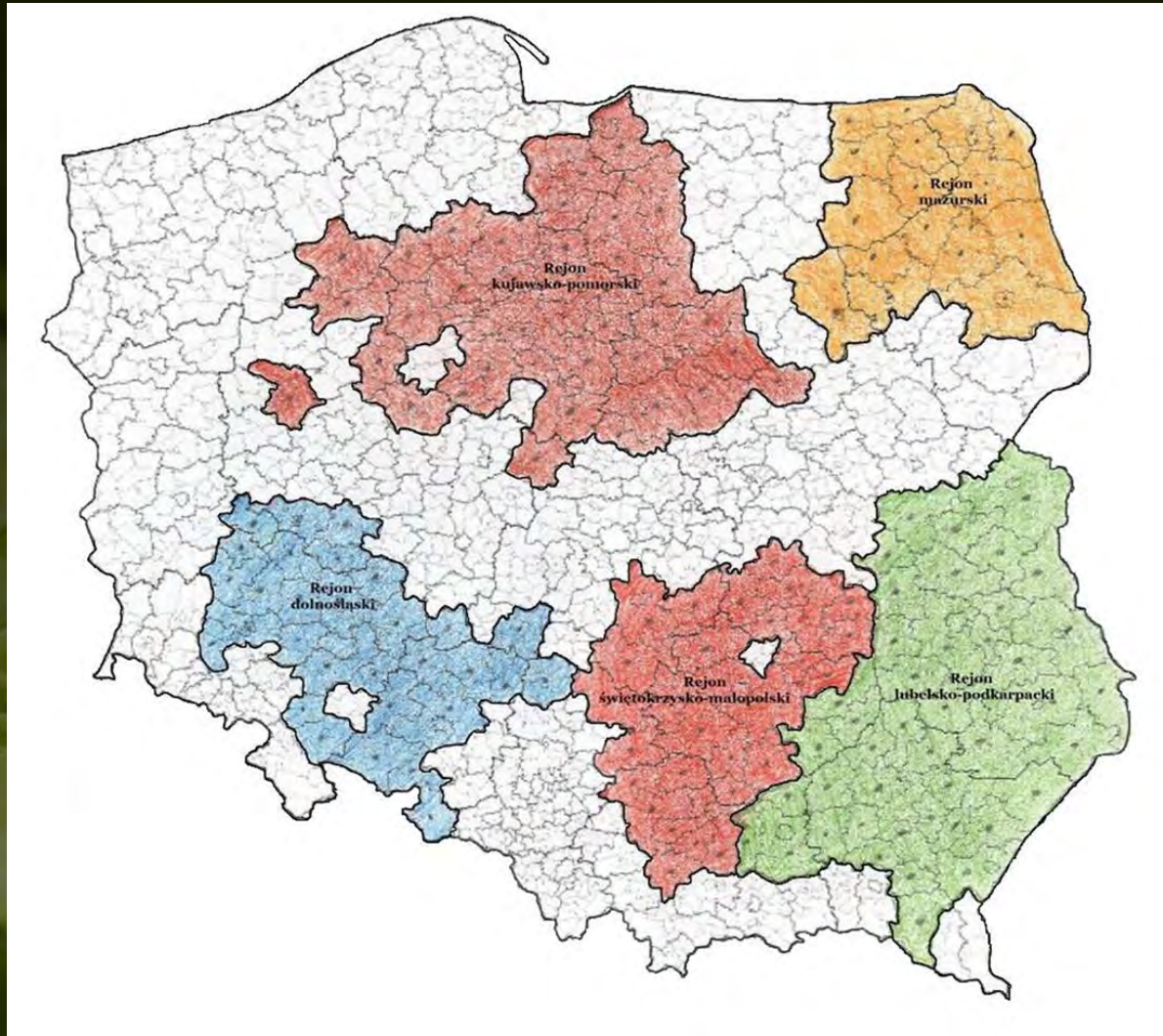


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# Poland - Growing Areas



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# Poland – Crop Calendar

Acitivity	FCV											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Seed Beds		█	█	█	█	█	█	█	█	█		
Transplanting				█	█	█						
Harvesting						█	█	█	█	█	█	
Buying	█	█	█	█	█			█	█	█	█	█
Processing	█	█	█							█	█	█

Acitivity	BURLEY											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Seed Beds		█	█	█	█	█	█	█	█			
Transplanting				█	█	█						
Harvesting						█	█	█	█	█	█	
Buying	█	█	█	█	█			█	█	█	█	█
Processing	█	█	█	█	█						█	█



## ➤ Farmers

- *Total number of farmers – 14,000 around*
- *3 National farmer unions*
- *9 Regional tobacco growers association*
- *11 Tobacco Producer Groups*

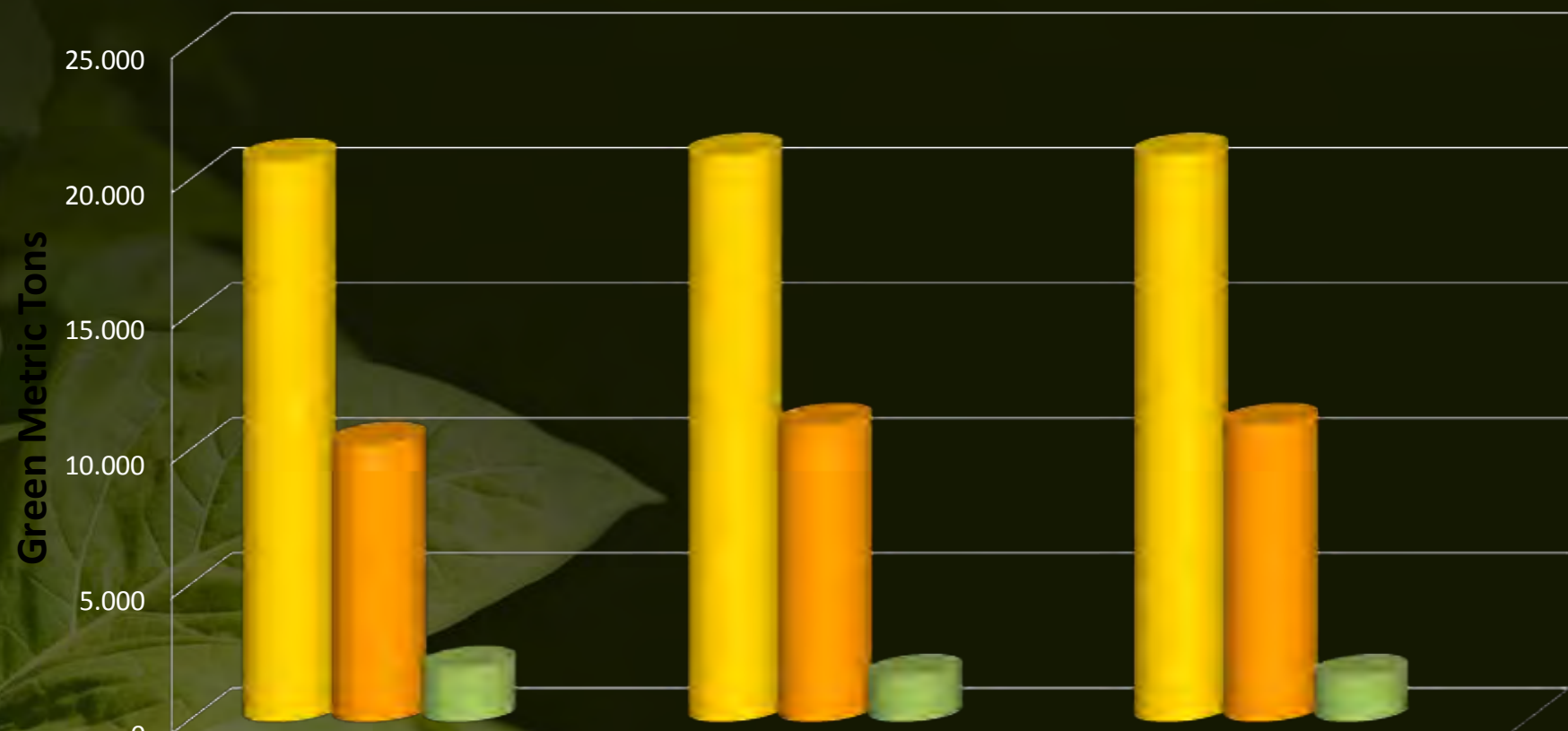
## ➤ Processors/tobacco contractors

- *ULTP*
- *PM Poland*
- *FTK*
- *Luxor*

## ➤ Regulatory / control organisations

- *Ministry of Agriculture*
- *Agricultural Market Agency (HQ in Warsaw + 16 Regional Offices)*
- *Agency for the Restructuring and Modernisation of Agriculture*
- *Agricultural Commission of the Polish Parliament*

# Poland - Crop Volumes Evolution 2011 -2013E



	2011	2012	exp. 2013
FCV	20.800	21.000	21.000
Burlay	10.300	11.000	11.000
DAC(M.Skr)	2.000	1.700	1.700
<b>TOTAL</b>	<b>33.100</b>	<b>33.700</b>	<b>33.700</b>

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# Poland - Number of Growers Crops 2011-2013E



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# ULT Poland Factory JEDRZEJOW

- **Site area**  
66,000 sqm
- **Storage area**  
11,000 sqm
- **Processing area**  
6,200 sqm
- **Yearly production**  
12,000 tons
- **Average hourly throughput**  
6,500 kg/h
- **Varieties processed**  
FC - Burley – Dark Air Cured





# The Complete Tobacco Cycle ....







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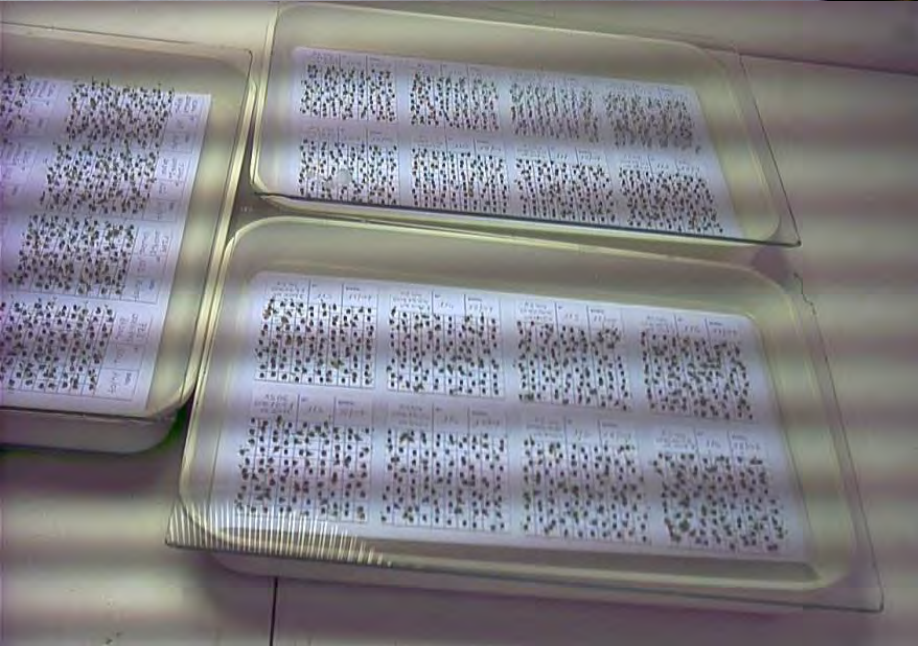
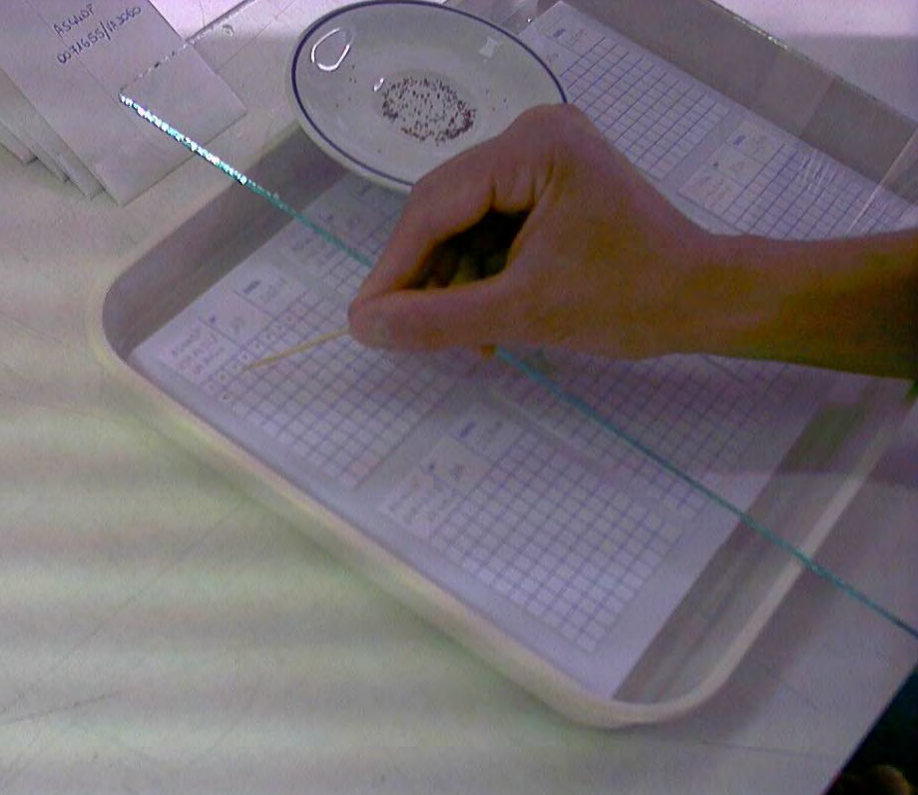
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# VIRGINIA BRIGHT

































# BURLEY







14 7 2005















**Thank You  
&  
Goodbye !**

**Grazie  
e  
Arrivederci!**

