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Re. 148.

THE POLISH SUGAR INDUSTRY

ON OCCASION OF THE ARRIVAL TO POLAND OF
MEMBERS OF THE BRITISH PARLIAMENT, ISSUED BY
ZWIĄZEK ZACHODNIO-POLSKIEGO PRZEMYSŁU CUKROWNICZEGO W POZNANIU
(„THE POLISH OCCIDENTAL SUGAR INDUSTRY ASSOCIATION“ IN POZNAŃ

POZNAŃ 1925
DRUKARNIA ŚW. WOJCIECHA

Re. 148.

Przemysł i Handlowd
w POZNANIU

733.

THE POLISH SUGAR INDUSTRY

ON OCCASION OF THE ARRIVAL TO POLAND OF
MEMBERS OF THE BRITISH PARLIAMENT, ISSUED BY
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4.11.1925
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POZNAŃ 1925
DRUKARNIA ŚW. WOJCIECHA

Re. 148.



35379 III

Izba
Przemysłowo Handlowa
w POZNANIU

D. 1953/106/39

I. ACTUAL POSITION OF THE POLISH SUGAR INDUSTRY.



oland, enjoying excellent natural conditions for the development of agriculture (as regards climate, soil and vegetation) occupies an important position in the worldly output of products of the soil. The considerable quantities of the main agricultural products produced by Poland are evidenced by the following table, stating the relation thereto of the worldly crop (in the year 1923).

	Wheat	Rye	Potatoes	Sugar Beet
Worldly output	103.109	41.767	142.280	39.192
Poland	1.354	5.962	26.494	2.552

thousand metric tons. In the stated year the Polish crop yielded therefore: rye 14,3%, potatoes 18,5%, sugar beet 6,5% of the worldly production. As regards the output of rye and potatoes, Poland occupies at present the second place in the world.

	Rye	Potatoes
1. Germany	7.175.000 tons	31.470.000 tons
2. Poland	5.962.000 "	26.494.000 "
3. U. S. A.	1.645.000 "	11.223.000 "

It is obvious, that Poland, being a decidedly agricultural country, ought to dispose of an important surplus of agricultural products and have a highly developed agricultural industry.

In pre war times on the actual territory of Poland existed 87 sugar factories, yielding about 600 000 tons sugar, about 2000 distilleries, producing something like 2 200.000 hl 100% alcohol, 385 breweries with a production of nearly 3 000.000 hl beer and 110 potato flour factories, transforming round about 1 500.000 tons potatoes into starch, dextrin, syrup and potato flakes.

The foremost position among agricultural industries belongs to the sugar industry, attaining in Poland a very high level of development. As mentioned before, 87 working sugar factories existed in Poland in pre war times. The area of beet plantations amounted to 172.000 ha, the beet crops to round about 4 000.000 tons, the output of sugar to 600.000 tons. Bearing in mind, that the production of beet sugar in Europe in the campaign 1913/14 was represented by the figure of 7 350.000 tons (value white sugar), the output of Poland exceeded 8% of the worldly European production of sugar. The consumption of sugar in Poland equalling about 270.000 tons, considerable quantities (abt 330.000 tons) were available for export.

The development of the sugar industry after the war is as follows:

Campaign	Area of beet plantations	Quantity of beet transformed	Output of sugar
1920/21	69.313 ha	1.053.864 tons	156.100 tons
1921/22	81.880 "	1.042.727 "	160.100 "
1922/23	107.673 "	1.926.198 "	273.600 "
1923/24	140.482 "	2.552.160 "	344.800 "
1924/25	168.347 "	3.137.676 "	439.000 "

The above table speaks for itself with regard to the rapid development of the Polish sugar industry after the war.

In order to fully appreciate the efforts which had to be made by the Polish sugar industry in the way of setting in motion the factories and increasing the output, one must bear in mind, that during the worldly and Polish-Bolchevist war Poland was more than once exposed to the display of hostilities, in consequence of what a good many factories were damaged or even completely destroyed. The work of reconstruction of the damaged factories and the re-erection of those destroyed was carried on at a fast pace; out of the 24 entirely destroyed factories 15 are up till the present moment re-erected and set at work, and it should be specially observed, this work was accomplished entirely at the cost of the owners, without any aid of the State.

On the territory of Poland 75 factories are actually working; this number will be increased in the coming campaign by one recently constructed.

With regard to technical appliances, the position of the Polish factories is quite satisfactory. In connection however with the heavy crisis being undergone by the beet sugar industry and brought about by the strong competition of cane sugar, and considering that Poland, exporting fair quantities of sugar, has to reckon with this crisis, the Polish sugar industry is at present endeavouring to introduce far reaching improvements, respectively substitutions of technical appliances, for the purpose of lowering the cost of production.

The Polish sugar factories vary a good deal with regard to their dimensions, respectively their transforming capacity. Apart from several large factories, equalled by only a few in the rest of Europe, and a couple of small ones, the bulk of the factories is of a medium type, prevailing also in other beet countries.

The Polish factories may be divided in the following groups with regard to their size:

Daily transformation under		400	tons beet		18 factories	
"	"	from	400 to	500	"	" 17 "
"	"	"	500 "	1.000	"	" 22 "
"	"	"	1.000 "	1.500	"	" 11 "
"	"	"	1.500 "	2.000	"	" 4 "
"	"	"	2.000 "	3.000	"	" 2 "
"	"	"	3.000 "	"	"	" 1 "

The factory Chełmża is the largest in Poland, and is provided with technical plant, enabling the transformation of 3000 tons beet in 24 hours; up to date the factory Chełmża is also the largest in Europe.

As regards the grades of sugar yielded by the Polish factories, the bulk of the production is represented by white crystals, introduced at present on the foreign markets as type P. Moreover Poland produces considerable quantities of Raw sugar, which is partly melted in home refineries, the greater part however is an article of export, the more as the sugar factories producing Raw sugars are

all located in Western Poland, i. e. the nearest to export markets; in the current campaign the export of Raw sugar from Poland will be of about 120.000 tons.

Poland has also several excellently equipped refineries, producing Refined sugar of all descriptions (loaves, cubes etc.); in the actual campaign the output of Refined equalled nearly 60.000 tons.

About 25 Polish factories have drying departments for beet pulp. In the last campaign abt 50.000 tons dried pulp were produced and the greater part was exported, Poland disposing of a considerable excess of feeds. Likewise the other by-product yielded by sugar factories — molasses — is in fair quantities exported abroad (the export of molasses from Poland equalled in 1922/23 13.000 tons, 1923/24 18.000 tons, 1924/25 25.000 tons).

In order to complete the characteristic features of Polish sugar factories, it should be mentioned, that in many cases the latter own vast factory settlements (comprising dwelling houses for workmen, infant-schools, schools etc.) Moreover a good many factories have constructed their own narrow-gauge railway lines; the Polish sugar industry owns at present abt 1500 klm narrow-gauge railway lines and proposes constructing a further 750 klm during the 3 years to come. Several factories, situated in the vicinity of waterways, own harbour installations and river boats.

The Polish sugar industry is well organised. There exist at present and are active two territorial Unions: „The Polish Occidental Sugar Industry Association“ in Poznań, uniting the sugar factories of Western Poland (the Poznań and Pomeranian voievodships) and the „Commercial Company of the Associated Sugar Factories“ in Warsaw, comprising the factories of the rest of Poland. The aforementioned Unions have constituted in common a Board called the „Head Council of the Polish Sugar Industry“, which is a representative of the whole industry, entrusted with the carrying out on its behalf of a uniform commercial and economic policy.

For the purpose of securing proper outlets, the Polish sugar industry has established a strong cartel, uniting in the running campaign 67 factories (out of the general number 75) and representing 95% of the total output of Poland. The cartel organisation is based on centralisation of the sale of sugar both for export and home consumption.

The sale of sugar for home requirements is being effected on joint account, at prices and on terms established by the associated industry; likewise the export of sugar is being conducted on joint account, so that each factory is remunerated for its production at a uniform average price, obtained by the sugar cartel in any one campaign for the total of sales.

For the purpose of ensuring the proper attendance to the commercial and financial side of business, the sugar industry has brought into life a professional institution under the style of „Bank Cukrownictwa S. A. w Poznaniu“ (The Sugar Industry Bank in Poznań), entrusted with the sale of sugar for export and home consumption. The Bank Cukrownictwa is in existence 4 years. Being based on

a powerful sugar industry, the Bank witnesses a rapid progress and is ranked at present among the most important Banks of Poland, having permanently at its disposal and turning over considerable funds, and financing sugar factories to an important extent. The Head Office of the Bank is in Poznań; moreover the Bank has Branches in Warsaw and Lwow, and owns offices in Danzig.

While giving account of the organisation of the Polish sugar industry, it is important to mention the Central Sugar Laboratory located in Warsaw; this laboratory does all the experimental and analytical work, concerning the sugar industry, as well as the cultivation and sugar percentage of beet. The sugar industry owns also a special professional organ of the press called „Gazeta Cukrownicza“ (The Sugar Industry Journal), appearing in Warsaw and existing as long as 32 years. As regards technical and sugar chemistry work, it should be mentioned, that all the managers and technical staff employed in the sugar industry are associated in professional unions of the so called „Koło Cukrowników“ (Sugar Industry Circle), holding regular congresses and meetings, devoted to technical problems.

One of the last enterprises of the Polish sugar industry was the establishment of its own Fire Insurance Company. This institution was formed in the middle of 1923 under the style of „Towarzystwo Wzajemnych Ubezpieczeń Cukrowni w Polsce“ (Mutual Insurance Company of the Sugar Factories in Poland). This Company progresses in a most favourable way.

As mentioned at the beginning, the Polish sugar industry has yielded in the running campaign (1924-25) round about 440 000 tons sugar. The value of this production, considering the fact, that prices of sugar in Poland are higher than those on the worldly market, exceeds the amount of 200 000 000 zloty or the equivalent of over £. 8 000 000. — Out of this year's sugar output Poland will export nearly 200 000 tons worth abt £. 3 400 000. —

It is obvious, that the industry yielding such quantities of sugar and exporting so much must be of paramount importance for the economic life of Poland.

To what extent the export of sugar influences the State balance of trade and that of revenues, is evidenced by the fact, that f. i. in the year 1923 the sugar exported equalled abt 8% of the general value of Polish export, whereas in the last and current year the amount of foreign currency received by the Bank Polski from the export of sugar exceeded £. 3 000 000. —

The State draws considerable profits from the sugar industry also in other respects, in the first line from taxes. The bulk of the revenues of the State Treasury in this connection are derived from the tax on consumption, otherwise called accise, imposed on sugars sold at home and amounting actually to 350 zloty per ton. Bearing in mind, that in the running campaign our country will consume abt 240 000 tons, the revenue of the State from tax on consumption will equal nearly 85 000 000 zloty, or about £. 3 400 000. —

The regulations actually in force in Poland regarding the turnover of sugar, as well as the export and import of same, may be summarised in the following manner:

On all sugars produced at home the State Treasury impose a tax, otherwise called accise, to the extent of 350 zloty per ton; this tax is payable upon forwarding the sugar from storehouse of factory for sale on the home market. Of late the State Treasury grant the sugar factories 6 months credit for payment of accise, at an interest of 6⁰/₁₀₀ per annum.

Sugars exported abroad are free from accise, on the strength of licences, granted by the Government in each special case. The import of sugar to Poland is subject to an import duty of 350 zloty per ton on Raw and Crystals, and 450 zloty per ton on Refined (article 22 p. 1 & 2 of the customs tariff).

In addition to the import duty, imported sugars are, likewise to those produced at home, subject to accise tax of 350 zloty per ton. The export of molasses and beet pulp is free from all fees in favour of the State Treasury.

The extent of Poland's output, as against that of the whole of Europe, shows, that in the current campaign Poland yielded nearly 7⁰/₁₀₀ of the European production, amounting to abt 6.450.000 tons (value white sugar).

While considering the amount of production of particular European countries yielding beet sugar, one may attribute to Poland the fourth place with regard to the volume of output:

1. Germany	about 1.440.000 tons
2. Czechoslovakia	„ 1.314.000 „
3. France	„ 745.000 „
4. Poland	„ 440.000 „

As regards the outlook on the further development of the Polish production of sugar, there is full ground for anticipating a permanent increase of same, since, firstly, the actual output is still by abt 25⁰/₁₀₀ lower than that of pre war times, and, secondly, Poland has vast areas endowed with excellent natural conditions for the cultivation of sugar beet, hitherto insufficiently or quite unexploited for this purpose, (vast regions of Little-Poland and Eastern Borders).

The economic and commercial possibilities for the outlet of an increased production seem to be also favourable. The Polish sugar industry will no doubt find a strong support in the home market.

The up to date consumption of sugar in Poland is so low, that a considerable increase of same in the coming years is more than probable. The home consumption in the campaign 1922/23 amounted to abt 6,6 kilos per head yearly; in the campaign 1923/24 to nearly 7 kilos, which quantity in comparison with other countries is exceedingly small; a consumption below this figure is in the period under review to be noted only in the case of the following countries: Russia (1,36 kilos), Roumania (3,68 kilos) and Jugoslavia (4,99 kilos).

Already the current campaign (1924/25) shows a considerable increase of the consumption, represented by the quantity of 9 kilos per head, or abt 30⁰/₁₀₀ over last year. A further increase of the consumption is to be reckoned with from year to year, the more as, in consequence of the accomplished financial reform,

the general economic conditions are likely to improve and the average standard of living of the wide circles of consumers is apt to trend upwards.

Moreover the sugar transforming industry is becoming more animated and takes a satisfactory development. The sugar industry is on its side conducting a far spreading propaganda, in order to increase the home consumption of sugar; in addition to this, the price of sugar inside the country will in all probability be gradually reduced, in harmony with the systematic efforts, made actually by the sugar industry with a view to lowering the cost of production, which will no doubt also contribute to the extending of outlets inside the country.

The export of Polish sugar before the war equalled about 330.000 tons. After the war the figures were as follows:

Campaign 1920/21	exported abt	43.100 tons
„ 1921/22	„ „	40.100 „
„ 1922/23	„ „	93.400 „
„ 1923/24	„ „	152.800 „
„ 1924/25	will be	„ „ 199.000 „

In the campaign 1924/25 were hitherto exported nearly 185.000 tons; as however the home consumption will not presumably exceed 240.000 tons, there will be a remainder of abt 14.000 tons of the actual crop, which will either be exported towards the end of the campaign, or will be transferred as stock to the coming campaign.

Owing to the cartel organisation centralising the export of sugar, export is being carried on only from those factories, that are situated the nearest to foreign markets.

With regard to the destination of sugars exported, it is to be noted, that apart from small quantities forwarded by land to Roumania, Switzerland, Germany and recently to Russia, the bulk of the export is shipped via Danzig and of late also via Stettin. The United Kingdom is since several years the most important buyer of Polish export sugar, and has purchased direct:

In the campaign 1922/23	34.873 tons
„ „ „ 1923/24	68.567 „
„ „ „ 1924/25	88.625 „

or otherwise in the year 1922/23 abt 37⁰/₀, and in the last two years abt 45⁰/₀ of the whole Polish export of sugar.

The cooperation with the English trade circles took since the very beginning a very successful and friendly turn. To the Polish sugar industry, deprived before the war of a direct touch with foreign markets in consequence of the dismemberment of Poland, the intercourse with English firms versed in sugar trade was very useful and profitable; the English trading spheres communicated readily the results of their experience and supplied various information with regard to the conditions and customs ruling on the sugar markets, enabling thus the Polish sugar industry to accommodate the quality of the sugar produced to the requirements of the market and ensure thereby the ready and profitable sale of their output.

The computation table, stating figures relative to export of sugar in various countries, shows, that in the current campaign Poland will probably occupy in this connection the second place in Europe, Czechoslovakia being on the first.

According to data actually at hand, the excess of export over import equalled: in Czechoslovakia abt 625.000 tons, Germany 186.500 tons, Poland up to date 184.260 tons, which will however be presumably increased to round about 199.000 tons.

In the post war period Poland had to undergo, likewise to a number of other European countries, a heavy inflation crisis with all its disastrous economic symptoms. The consequences of this crisis affected to a great degree the sugar industry, which is an industry of season, transforming its output in a period of several months and delivering it gradually in the course of the whole year. It is obvious, that for the conducting of the campaign and the payment for beet this industry requires yearly ample funds. The Polish money market not being able to provide these funds, the sugar industry was obliged to secure credits abroad, and in this manner business was initiated also with English financial circles. These relations are to be recorded since the spring of 1923, when the Polish sugar industry was granted a first considerable loan by a group of English Banks. In the following year the same Group granted to the Polish sugar industry a further increased credit, and also in the current year the aforementioned industry has secured from the same source a credit for financing the 1925/26 crop, for a still higher amount.

Further to the remarks, made by us above while speaking about the trade relations with England, we must give credit to the highly courteous attitude adopted by the English financial circles, which showed a remarkable understanding of the economic situation of our industry and grasped at once the conditions, in which this industry is developing, moreover were inclined to cooperate and establish close touch with us even during the heavy economic crisis in Poland, when foreign finance treated our country upon the whole with great reserve, respectively attempted to draw excessive profits, to a higher or lower degree, from the critical financial position of Poland.

The English financial spheres, acting in a highly loyal manner, contributed to a great extent in the work of helping the Polish sugar industry out of the post war difficulties, by giving their assistance in critical moments, and have thus laid down a strong basis for permanent cooperation.

Poznań, June 1925.

II. SPECIFICATION AND STATEMENT OF PRODUCTION OF THE SUGAR FACTORIES OF POLAND.

OUTPUT OF SUGAR 1913/14 AND 1924/25 (IN TONS).

A. WESTERN POLAND.

	1913/14	1924/25		1913/14	1924/25
1. Chełmża	32.035	19.934	14. Pelplin	11.327	9.201
2. Gniezno	18.080	9.048	15. Środa	16.664	8.657
3. Gostyń	16.139	11.705	16. Świecie	9.092	4.348
4. Janikowo	17.528	10.845	17. Szamotuły	13.981	7.870
5. Kościan	14.671	14.259	18. Tczew	5.995	— ¹⁾
6. Kruszwica	18.416	13.299	19. Tuczno	12.900	7.577
7. Mątwy	20.974	15.248	20. Unisław	9.897	4.695
8. Mełno	6.612	5.422	21. Wierzchosławice	9.398	7,317
9. Miejska Górka	12.460	12.432	22. Witaszyce	16.618	10.083
10. Nakło	10.390	9.187	23. Września	18.628	12.564
11. Niezychowo	6.761	— ¹⁾	24. Zduny	11.745	7.236
12. Opalenica	30.889	18.513	25. Żnin	18.270	12.372
13. Pakość	16.919	9.202		<u>376.389</u>	<u>241.014</u>

B. FORMER CONGRESS POLAND AND EASTERN BORDERS.

	1913/14	1924/25		1913/14	1924/25
1. Babino-Tomachowo	1.408	2.585	20. Klemensów	3.179	3.410
2. Borowiczki	4.607	3.854	21. Konstancja	3.803	3.839
3. Brześć Kujawski	8.713	10.759	22. Korzec	1.720	1.758
4. Ciechanów	6.578	6.795	23. Krasiniec	3.600	3.605
5. Cielce	2.859	1.797	24. Leśmierz	3.334	2.933
6. Chełmica	2.153	2.834	25. Lublin	5.958	4.652
7. Chocień	1.826	3.819	26. Łanięta	2.595	2.108
8. Czernsk	3.095	2.289	27. Łubna	2.268	3.168
9. Częstocice	4.627	4.428	28. Łyszkowice	1.523	2.179
10. Dobrze	6.610	9.113	29. Mała Wieś	3.377	2.606
11. Dobrzelin	3.732	4.850	30. Marja	2.485	1.431
12. Elżbietów	3.499	1.449	31. Michałów	4.438	4.041
13. Garbów	2.580	2.859	32. Milejów	3.417	3.383
14. Gosławice	4.557	7.898	33. Mircze	2.561	— ²⁾
15. Gucin	3.118	— ²⁾	34. Młodzieszyn	3.815	— ²⁾
16. Guzów	3.902	2.713	35. Młynów	2.463	1.885
17. Izabelin	3.408	4.865	36. Model	1.247	2.961
18. Józefów	9.954	5.285	37. Nieledeu	2.768	2.880
19. Karwice-Ozierany	3.815	4.238	38. Opole Lubelskie	2.113	3.249

39. Ostrowite	3.852	4.234	50. Tomczyn	1.200	2.117
40. Ostrowy	5.470	0.397	51. Trawniki	3.719	2.656
41. Poturzyn	4.735	— ²⁾	52. Walentynów	3.562	— ³⁾
42. Rejowiec	2.448	3.487	53. Wieluń	2.063	2.787
43. Rytwiany	2.019	1.544	54. Włostów	1.701	2.586
44. Sanniki	4.430	— ³⁾	55. Woźuczyn	1.484	3.474
45. Silniczka	1.137	— ³⁾	56. Zagłoba	4.366	— ³⁾
46. Strzelce	1.802	1.700	57. Zakrzówek	3.877	3.318
47. Strzyżów	2.779	2.905	58. Zbiersk	5.470	7.216
48. Szpanów	3.866	2.556	59. Żytyń	—	— ⁴⁾
49. Szreniawa	2.765	— ²⁾		<u>200.459</u>	<u>180.128</u>

C. LITTLE - POLAND.

1. Chodorów	4.333	7.432	3. Przeworsk	<u>12.684</u>	<u>7.653</u>
2. Chybie	350	3.039		17.367	18.124

1) Factory wound up after the war.

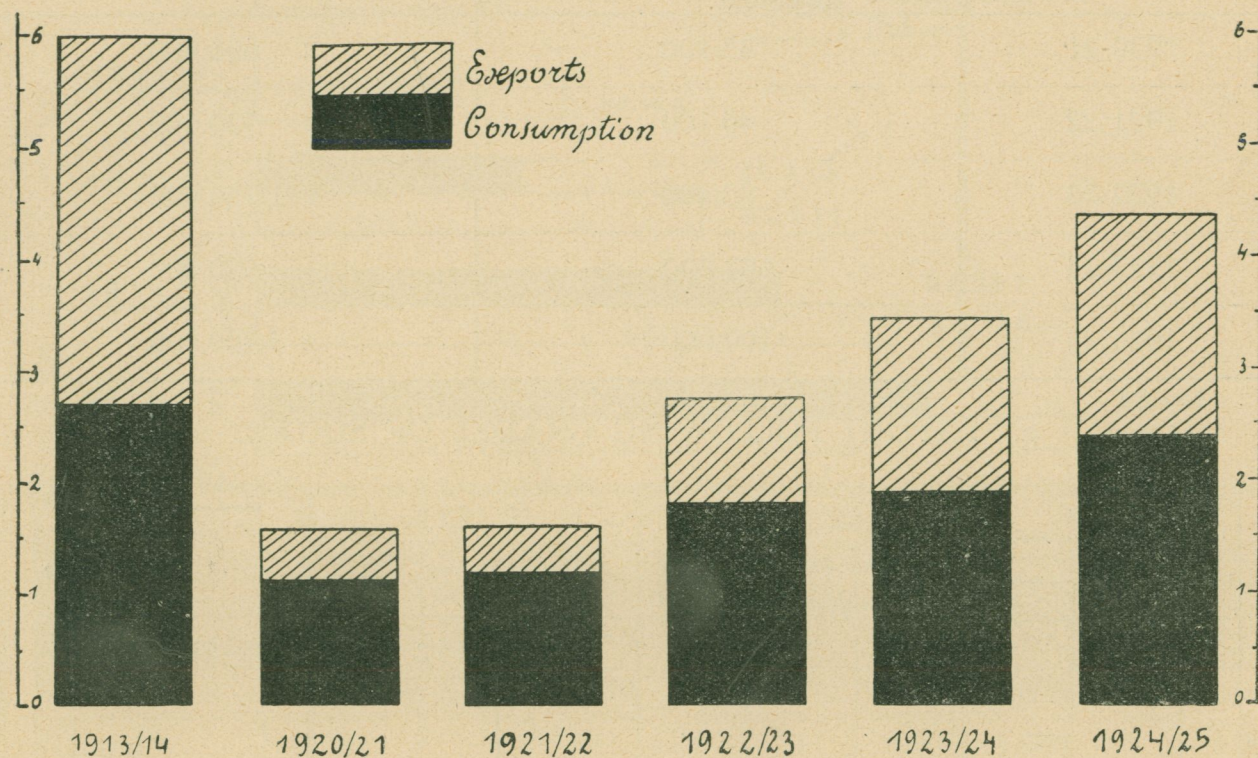
2) Factory destroyed in the year 1914 (resp. 1915).

3) Factory not working since the year 1915.

4) Factory refining sugar from purchased Raw and molasses.

III. GRAPHIC TABLES.

1. PRODUCTION, CONSUMPTION AND EXPORT OF SUGAR.

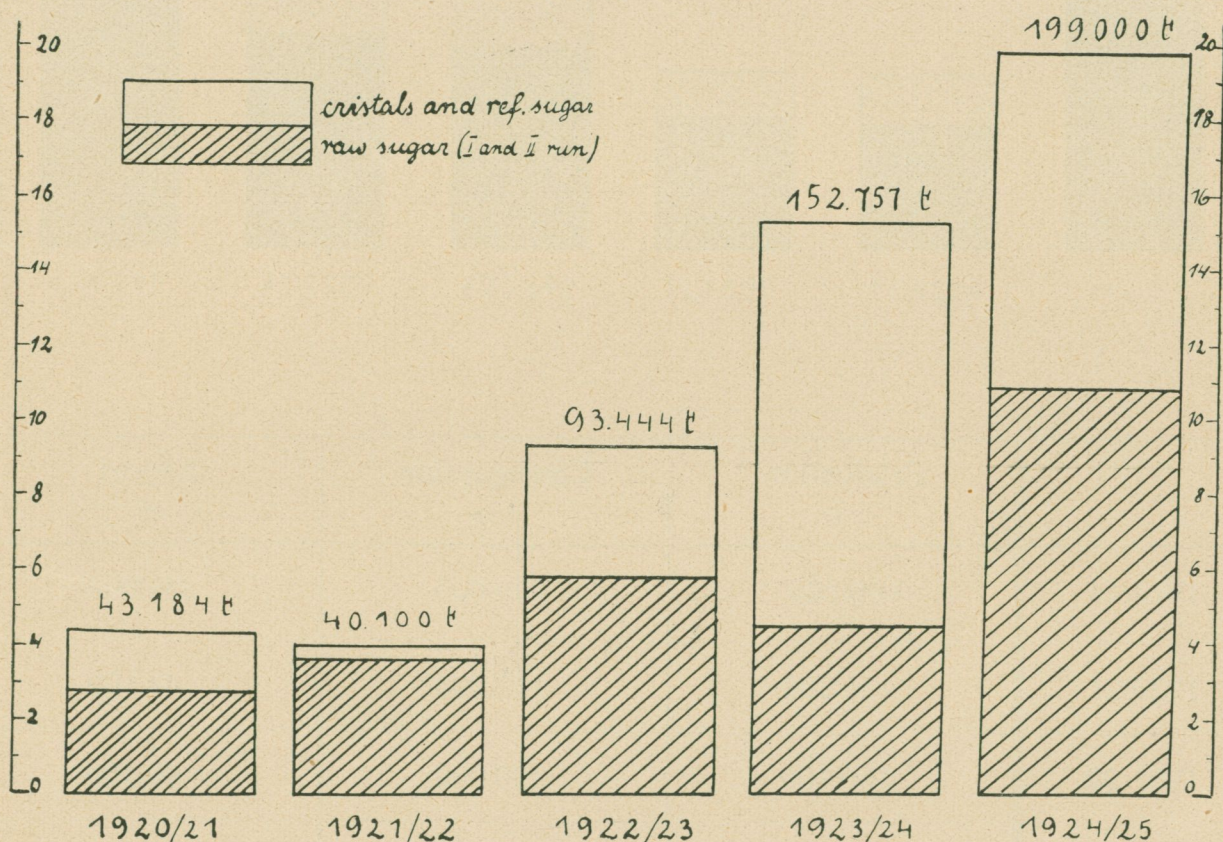


	Production tons	Consumption tons	Export tons
1913/14	600.000	270.000	330.000
1920/21	156.100	113.000	43.100
1921/22	160.100	120.000	40.100
1922/23	273.600	180.200	93.400
1923/24	344.800	192.000	152.800
1924/25	439.000	240.000	199.000

2. POLISH EXPORT OF SUGAR.

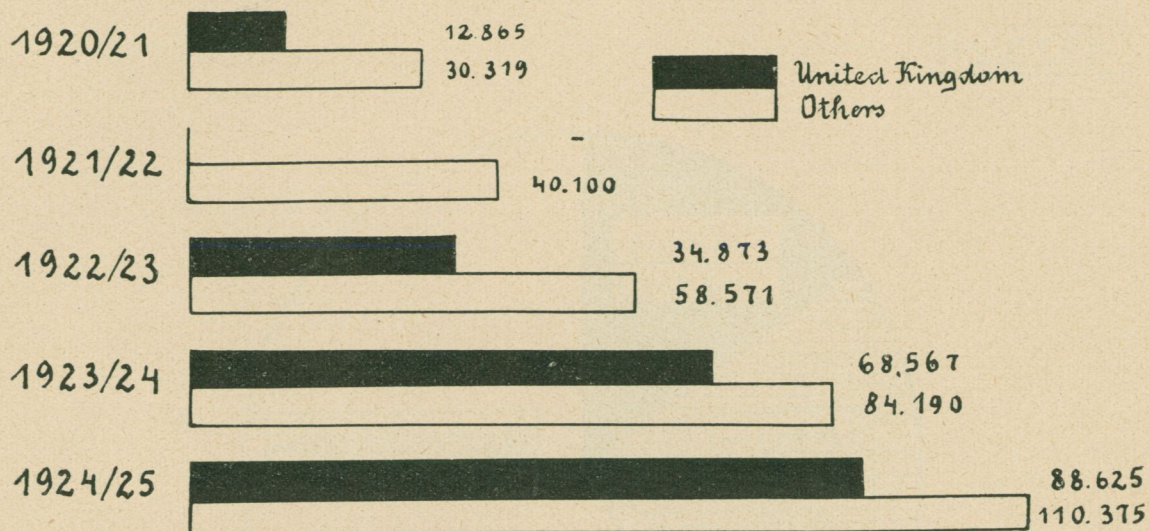
	Quantity in tons	Value of export
1920/21	43.100	£ 605.000
1921/22	40.100	£ 720.000
1922/23	93.400	£ 1.750.000
1923/24	152.800	£ 3.620.000
1924/25	199.000	£ 3.400.000

a. EXPORT FOLLOWING GRADES OF SUGAR.



	1920/21	1921/22	1922/23	1923/24	1924/25
crystals and refined sugar	15.550	3.320	35.427	107.006	89.970
raw sugar (I & II run) white value	27.634	36.780	58.017	45.751	109.030

b. EXPORT FOLLOWING COUNTRIES OF DESTINATION.

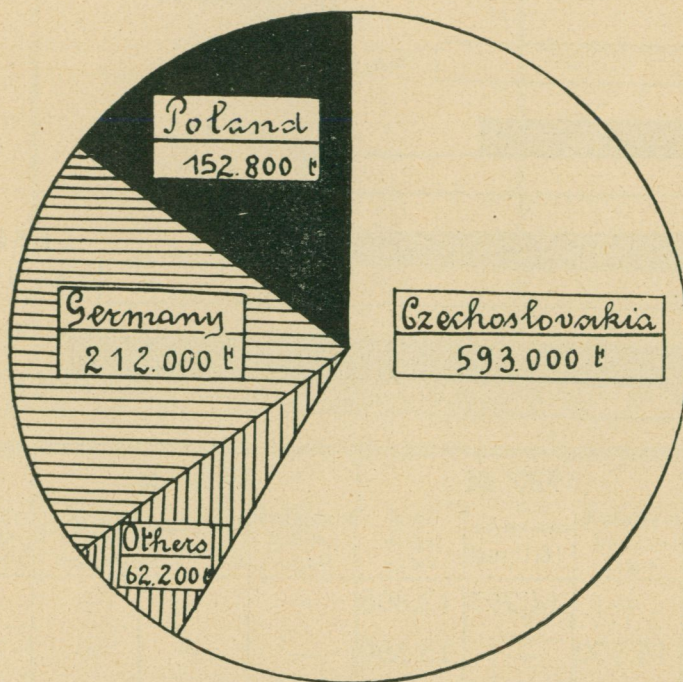


	1920/21			1921/22			1922/23		
	crystals & refined sugar	raw sugar (I & II run)	total white value	crystals & refined sugar	raw sugar (I & II run)	total white value	crystals & refined sugar	raw sugar (I & II run)	total white value
United Kingdom	—	14.295	12.865	—	—	—	7.100	30.859	34.873
France	15.550	—	15.550	—	—	—	3.000	—	3.000
Finland	—	—	—	2.500	—	2.500	4.400	—	4.000
Germany	—	3.500	3.150	—	4.000	3.600	—	—	—
Holland	—	—	—	—	—	—	50	3.000	2.750
Switzerland	—	—	—	—	—	—	5.905	—	5.905
Others	—	12.910	11.619	820	36.867	34.000	14.972	30.604	42.516
Total	15.550	30.705	43.184	3.320	40.867	40.100	35.427	64.463	93.444

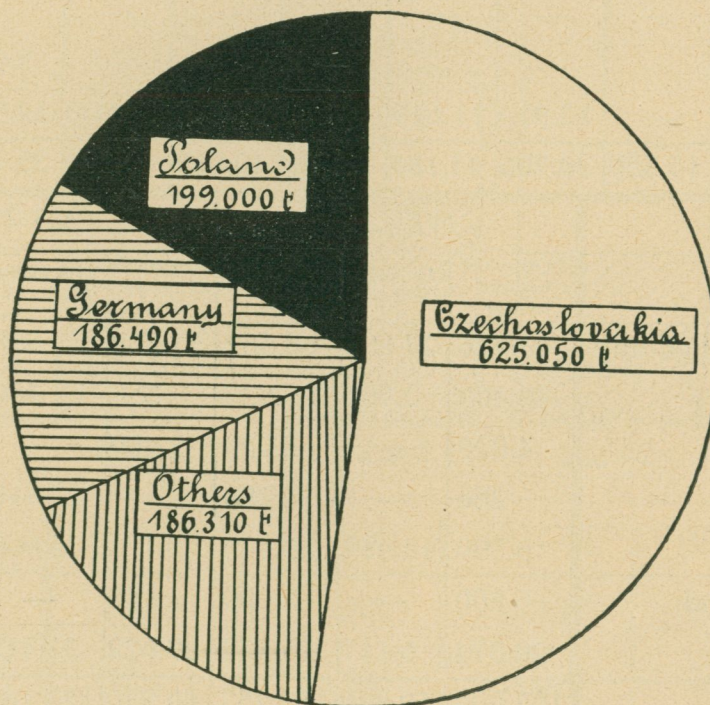
	1923/24			1924/25		
	crystals & refined sugar	raw sugar (I & II run)	total white value	crystals & refined sugar	raw sugar (I & II run)	total white value
United Kingdom	43.726	27.602	68.567	57.568	34.508	88.625
France	26.400	2.700	28.830	350	200	530
Finland	4.020	—	4.020	2.400	—	2.400
Germany	286	—	286	—	22.718	20.446
Holland	6.500	14.417	19.475	—	32.000	28.800
Switzerland	6.000	—	6.000	30	—	30
Others	20.074	6.117	25.579	29.622	31.718	58.169
Total	107.006	50.836	152.757	89.970	121.144	199.000

3. EXPORT OF PARTICULAR EUROPEAN COUNTRIES.

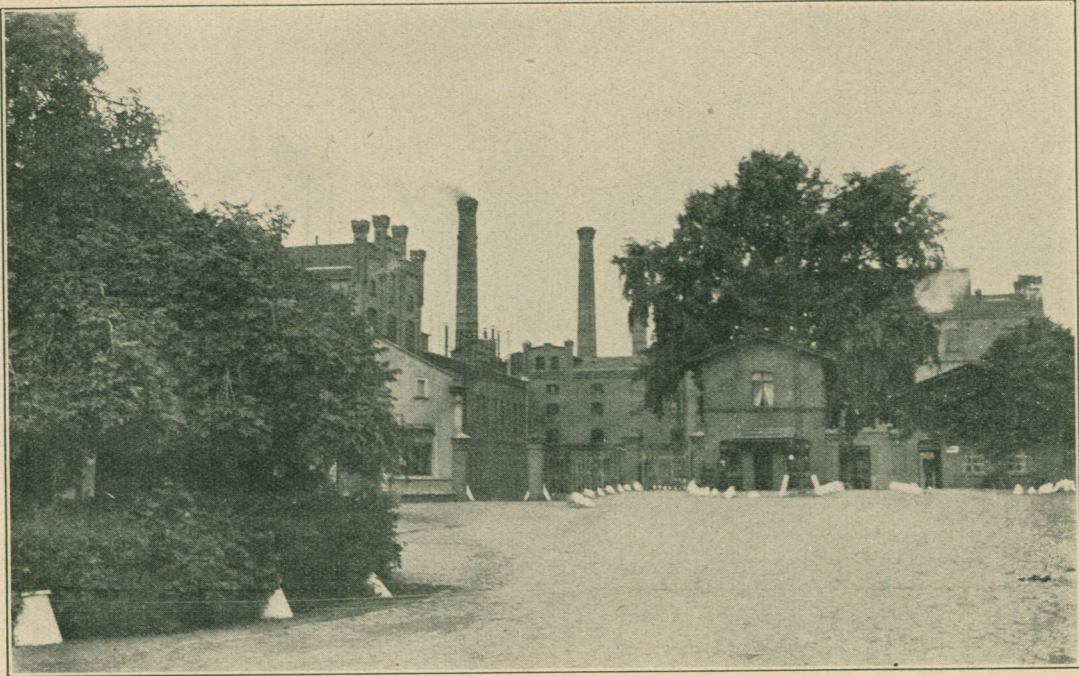
1923/24



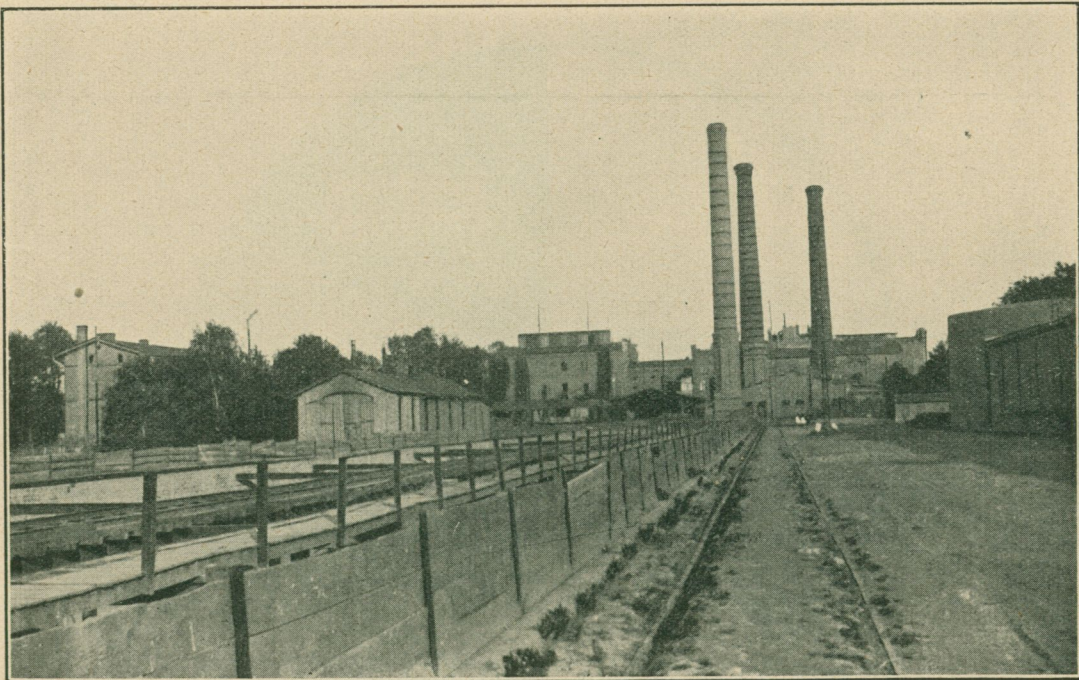
1924/25



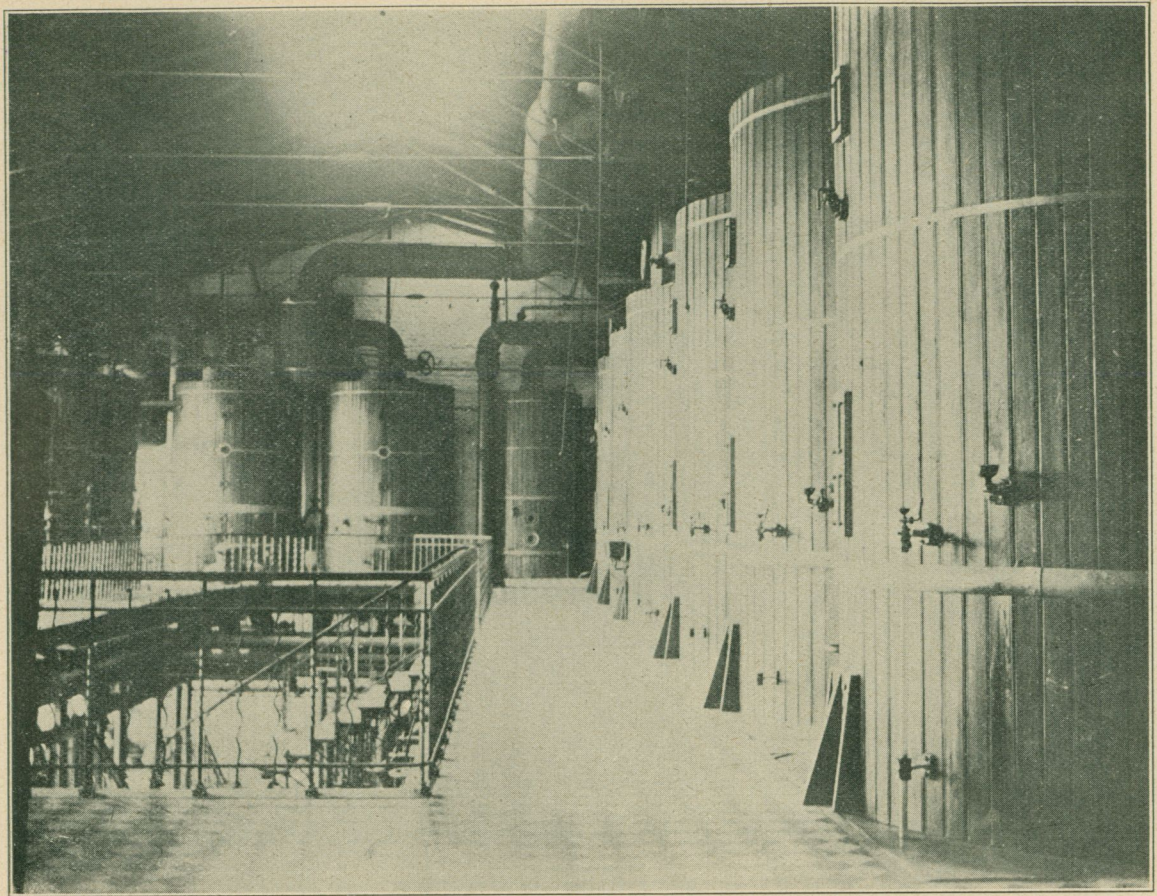
IV. PHOTOGRAPHS.



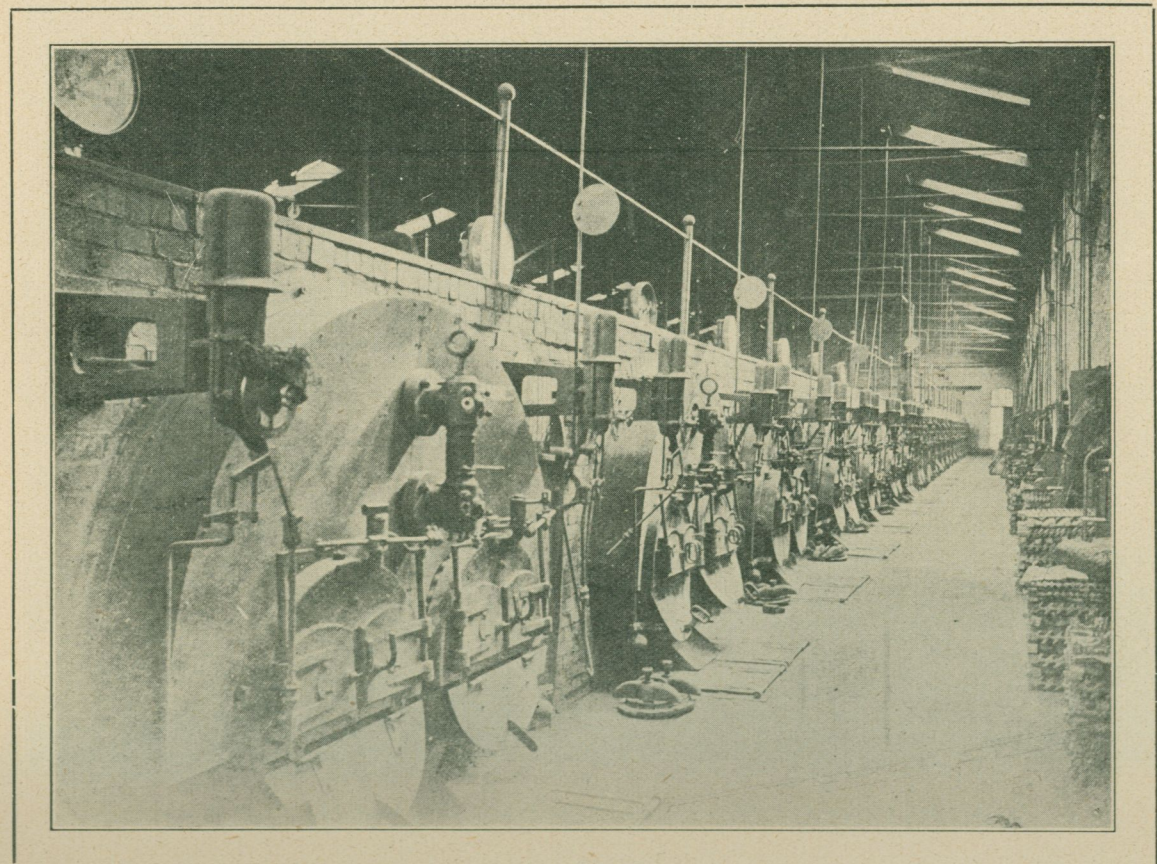
Chelmza, the largest sugar-factory in Poland and in Europe (transforming capacity 3000 tons beet in 24 hours).



Factory Chelmza — exterior view.

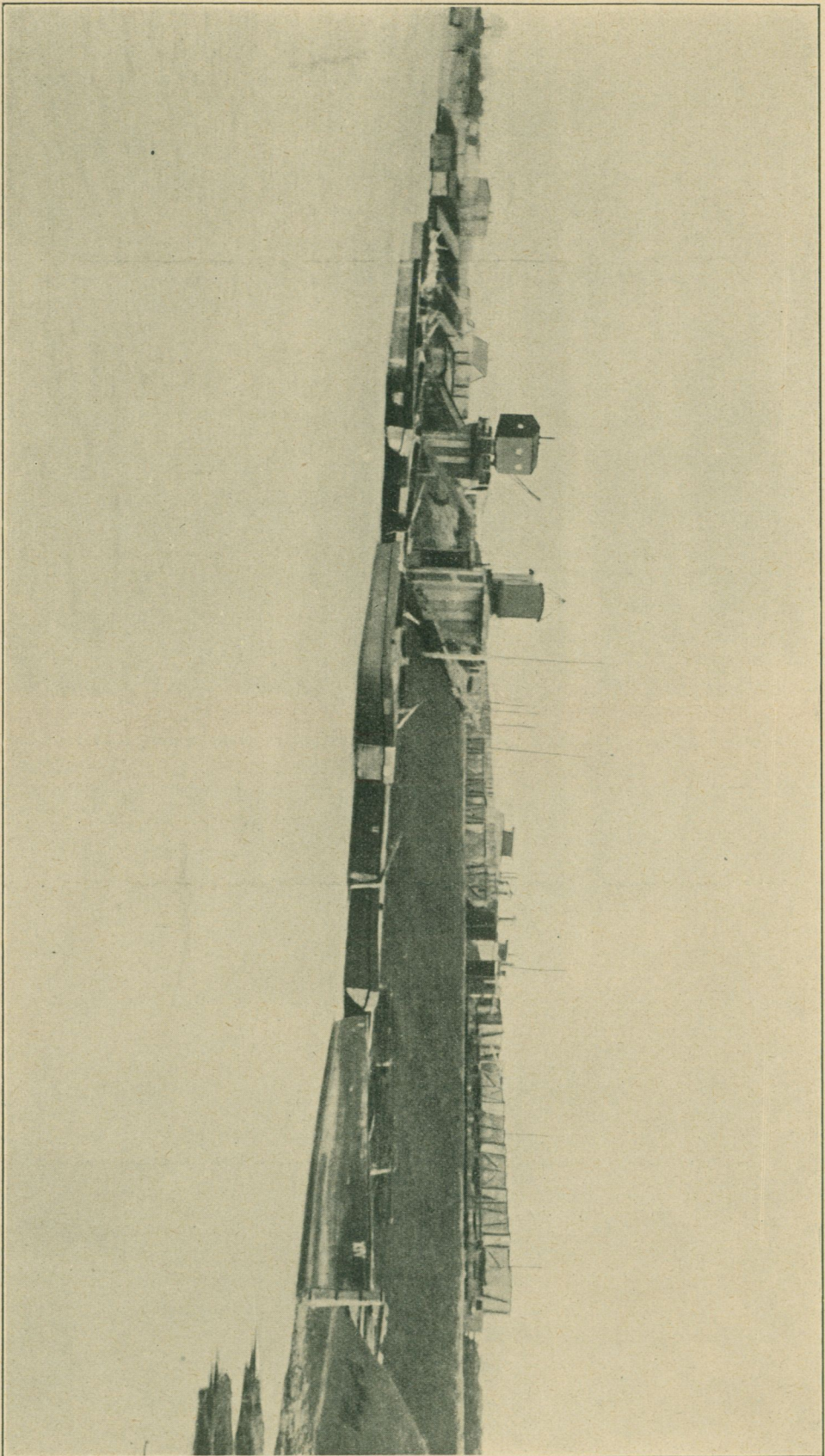


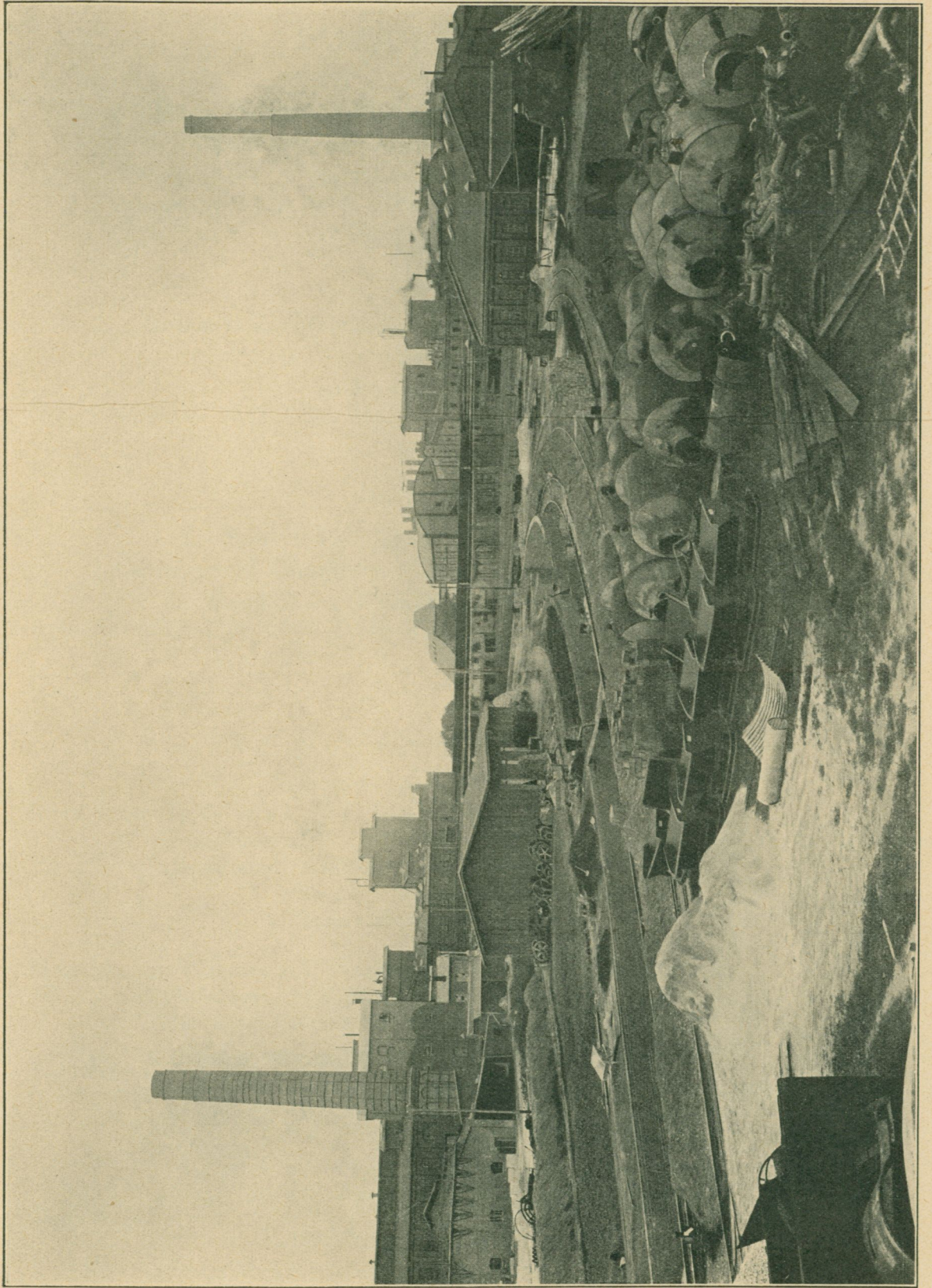
Evaporation station of the sugar-factory Chełmża.



Boiler-shop of the sugar-factory Chełmża.

Harbour installations of the sugar-factory Kruszwica.





General view of the sugar-factory Opalenica (daily transformation 2 400 tons beet).

V. ADDRESSES OF ORGANISATIONS OF THE POLISH SUGAR INDUSTRY:

1. Rada Naczelna Polskiego Przemysłu Cukrowniczego
(„Head Council of the Polish Sugar Industry“)
in Poznań, Skarbowa 16.
Telephones: 2252, 2272. Telegraphic address: „Cukrorada“ Poznań.

2. Związek Zachodnio-Polskiego Przemysłu Cukrowniczego
(„The Polish Occidental Sugar Industry Association“)
in Poznań, Skarbowa 16.
Telephones: 2252, 2272, 3561. Telegraphic address: „Cukropol“ Poznań.

3. Spółka Handlowa Cukrowni Związkowych
(„Commercial Company of the Associated Sugar Factories“)
in Warszawa (Warsaw), Krakowskie Przedmieście 7.
Telephones: 5543, 5707, 8499, 11119. Telegraphic address: „Cukrozwiązek“ Warszawa.

4. Bank Cukrownictwa Sp. Akc.
(„Sugar Industry Bank Ltd.“)
Head office: in Poznań, Sew. Mielżyńskiego 2.
Telephones: 1217, 3648, 5406, 5459. Telegraphic address: „Bacukro“ Poznań.
Codes used: ABC Code 6th Edition,
Bentleys Complete Phrase Code,
Rudolf Mosse Code.

Branches: in Warszawa (Warsaw), Krakowskie Przedmieście 55.
Telephones: 6813, 6827, 6858, 6887.
Telegraphic address: „Bacukro“ Warszawa;
in L w ó w, Kopernika 9.
Telephones: 242, 617. Telegraphic address: „Bacukro“ Lwów.

5. Gazeta Cukrownicza.
(„The Sugar Industry Journal“)
Editor's office and Administration: Warszawa (Warsaw), Mazowiecka 13.
Telephone: 7320.

6. Centralne Laboratorium Cukrownicze
(„Central Sugar Industry Laboratory“)
in Warszawa (Warsaw), Krakowskie Przedmieście 7.
Telephone: 30430.

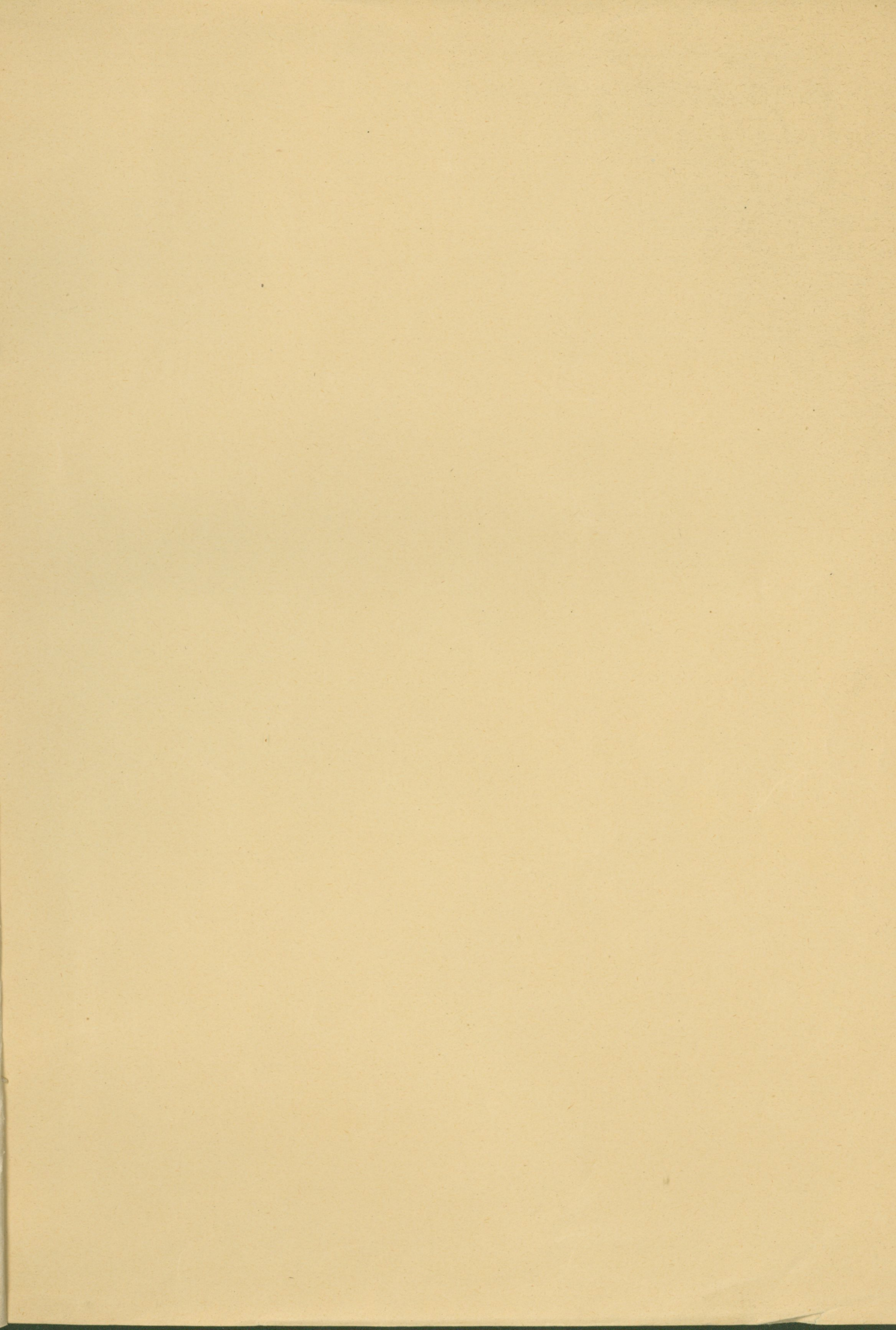
7. Towarzystwo Wzajemnych Ubezpieczeń Cukrowni w Polsce
(„Mutual Insurance Company of the Sugar Factories in Poland“).
Head office: in Warszawa (Warsaw), Krakowskie Przedmieście 7.
Telephone: 3370.
Branch: in Poznań, Skarbowa 16.
Telephone: 1497.

Izba
Przemysłowo Handlowa
w POZNANIU

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