

A photograph of a sugarcane field at sunset. The sky is a mix of orange, pink, and blue, with the sun low on the horizon. The sugarcane stalks are in the foreground, some in sharp focus and others blurred. The overall mood is serene and agricultural.

# SUGARCANE INDUSTRY TRANSFORMATION

## **RAIZEN**

JULY 2023

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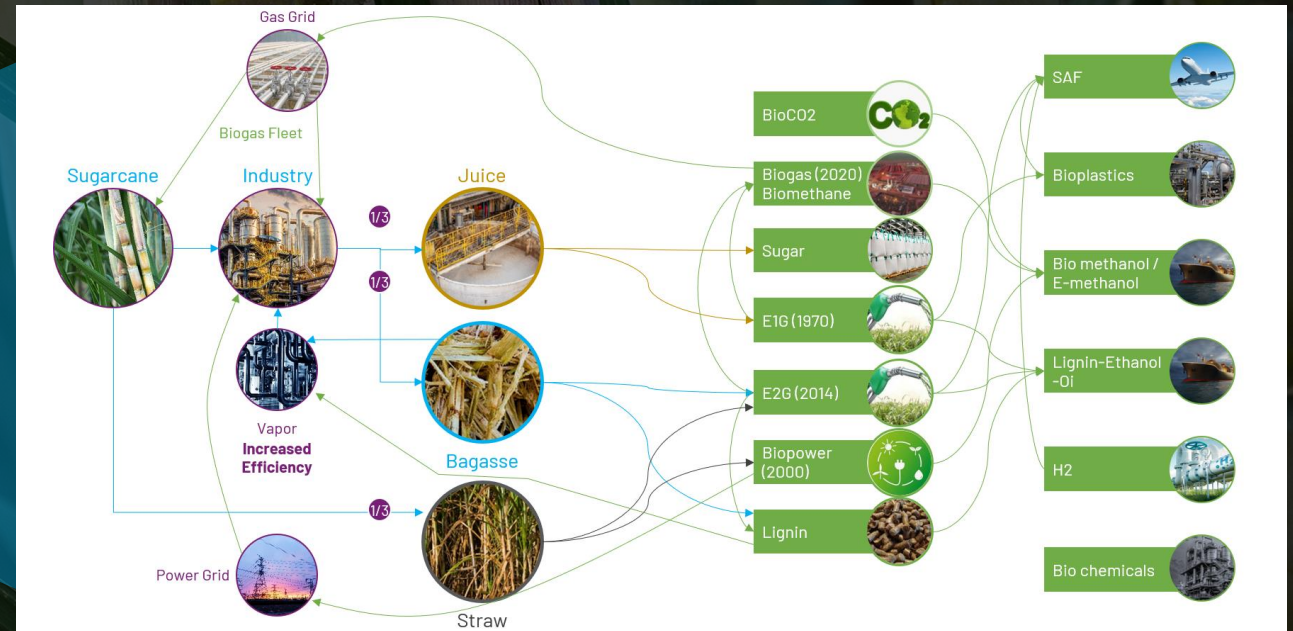
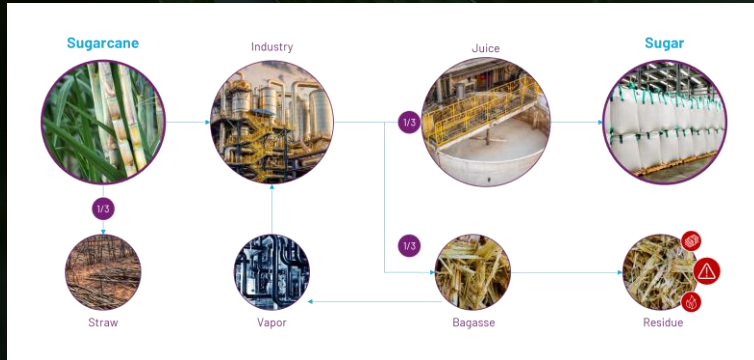
# Sugarcane Industry Transformation

Until ~70's

70's → Current → Future

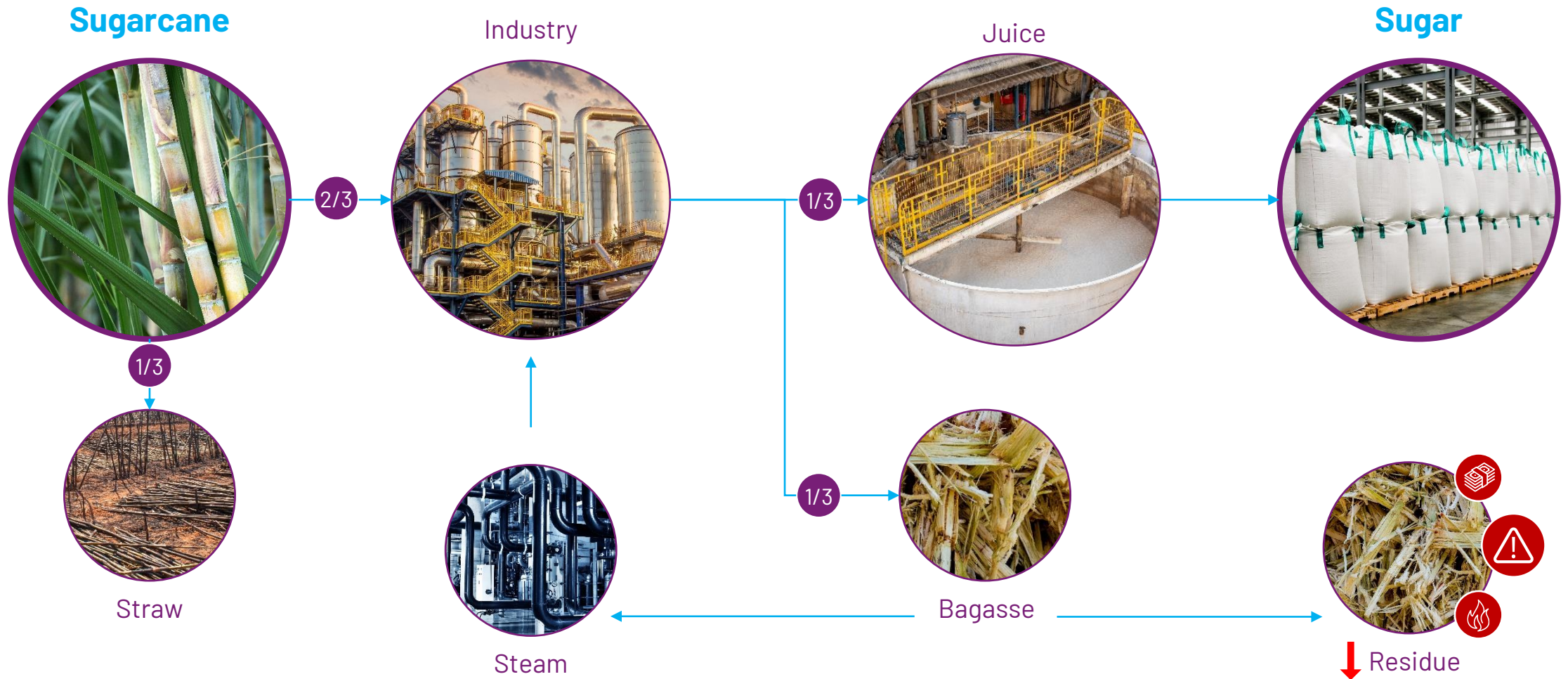
## Sugar Producer

## Bioenergy Complex



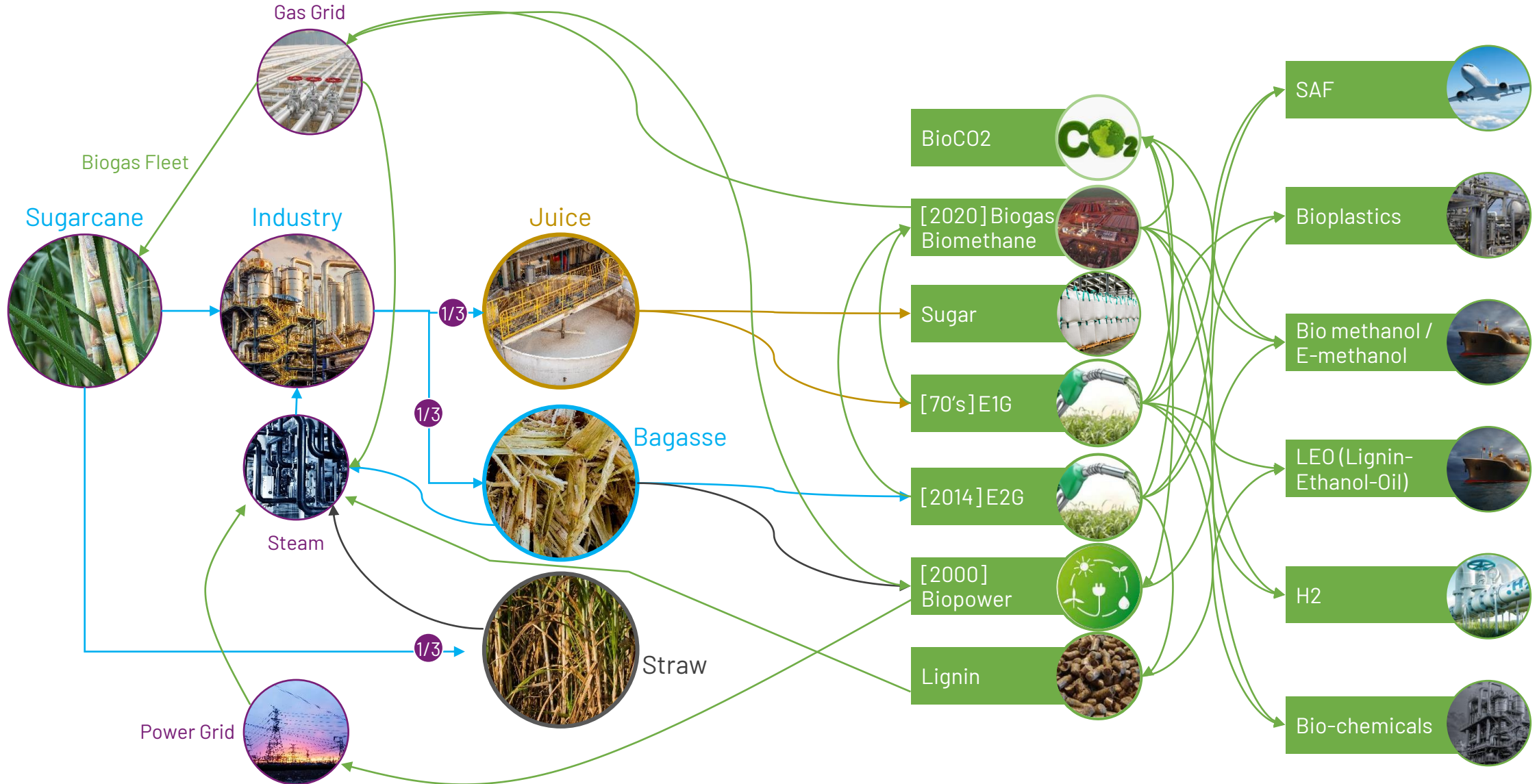
# Sugar Mill

Until ~70's



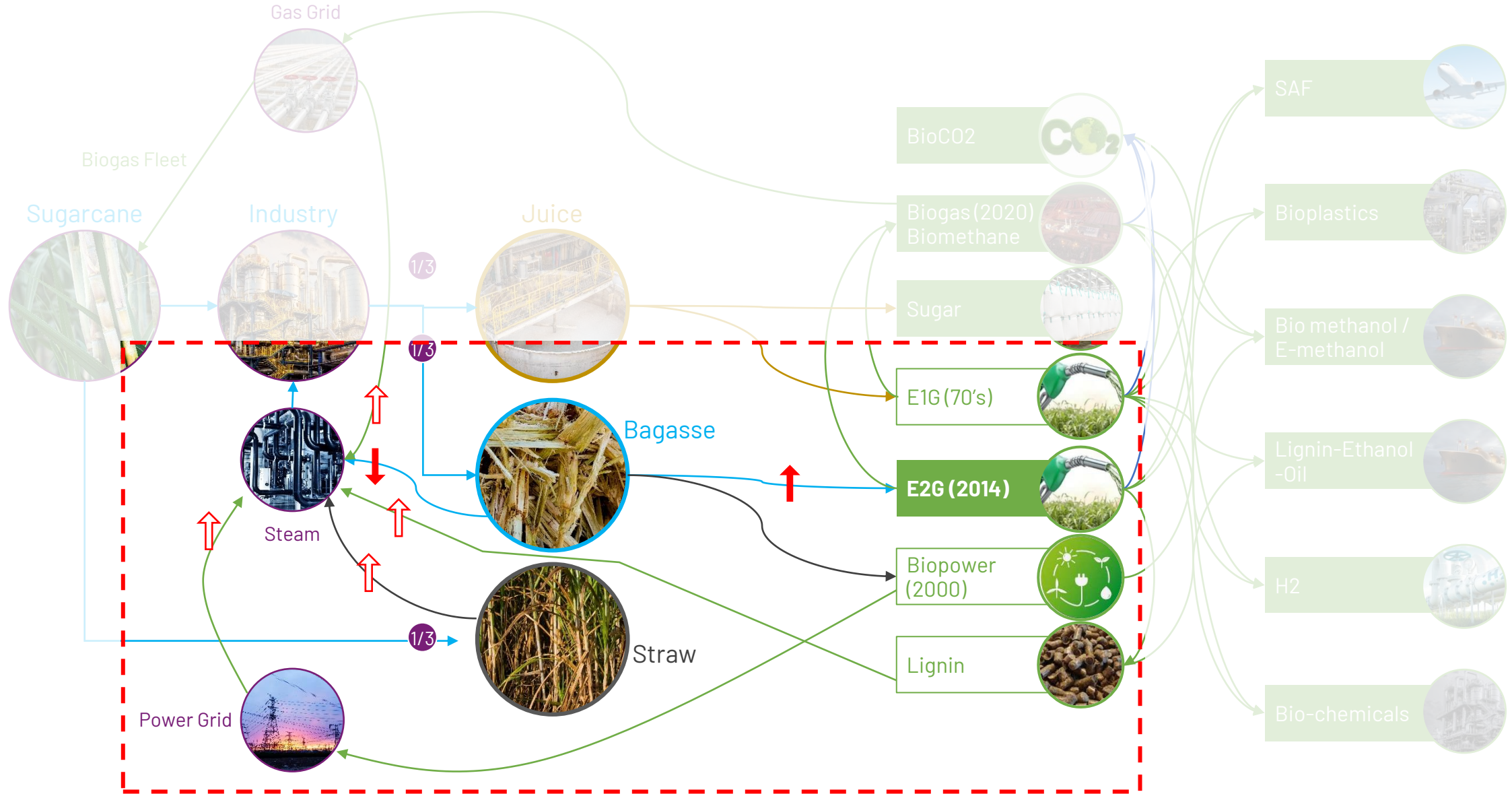
# Bioenergy Complex

70's → Current → Future



# Bioenergy Complex – Energy Balance

70's → Current → Future



# Final Messages

Transformation: more **ENERGY**, same land  
Diverse portfolio: **Flexibility + Optionality**  
**Decarbonization** of multiples sectors

Not covered today: **area expansion + agri yield**

Our belief:  
Collaboration **Public + Private, Japan + Brazil**



**Thank You!**