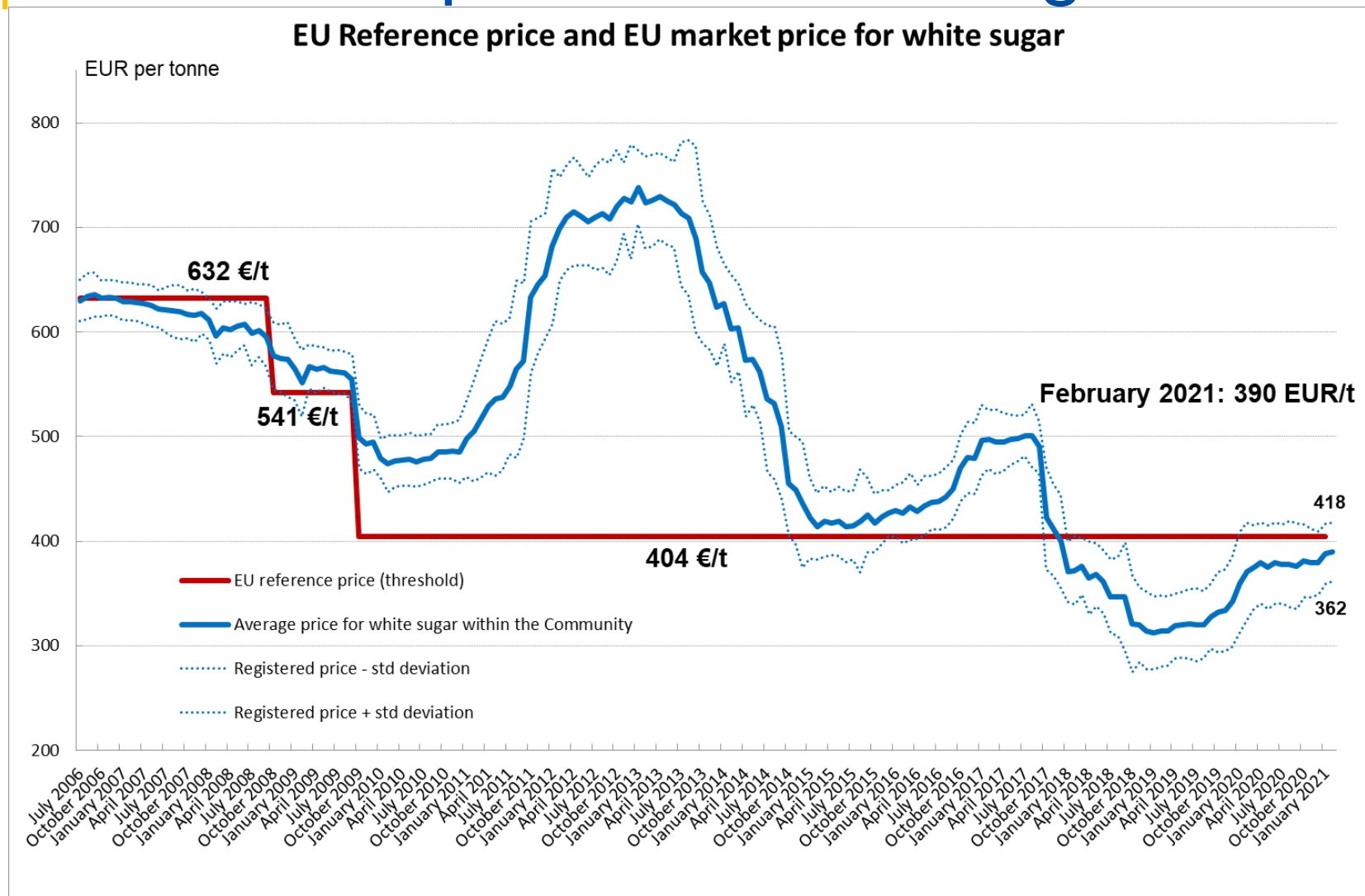


Sugar Price reporting

AGRI G 4 – Civil Dialogue Group – Arable Crops
Sugar sector

19 April 2021

EU market price for white sugar



- Increase by EUR 2 per tonne compared to previous month
- Increase by EUR 19 per tonne compared to Feb. 2020

EU and Regional market prices for white sugar

Commission Regulation - R 2017/1185 Art. 12 (a) - Annex II 1.

Average price for white sugar within the Community

Ex-work prices for homogeneous granulated crystal, standard quality, in bulk or big bags

Region 1: AT – CZ – DK – FI – HU – LT – PL – SE – SK

Region 2: BE – DE – FR – UK – NL

Region 3: BG – ES – GR – HR – IT – PT – RO

in €/t	EU		Region 1	Region 2	Region 3
	average (1)	std dev (2)	average (1)	average (1)	average (1)
February 2020	371	47	379	358	450
March 2020	375	40	383	364	445
April 2020	379	39	384	371	451
May 2020	375	40	386	363	453
June 2020	379	39	380	367	458
July 2020	378	38	378	367	463
August 2020	378	41	383	365	465
September 2020	376	41	381	362	459
October 2020	381	35	378	371	451
November 2020	379	33	382	369	445
December 2020	379	30	380	367	444
January 2021	388	29	386	378	443
February 2021	390	28	391	380	454

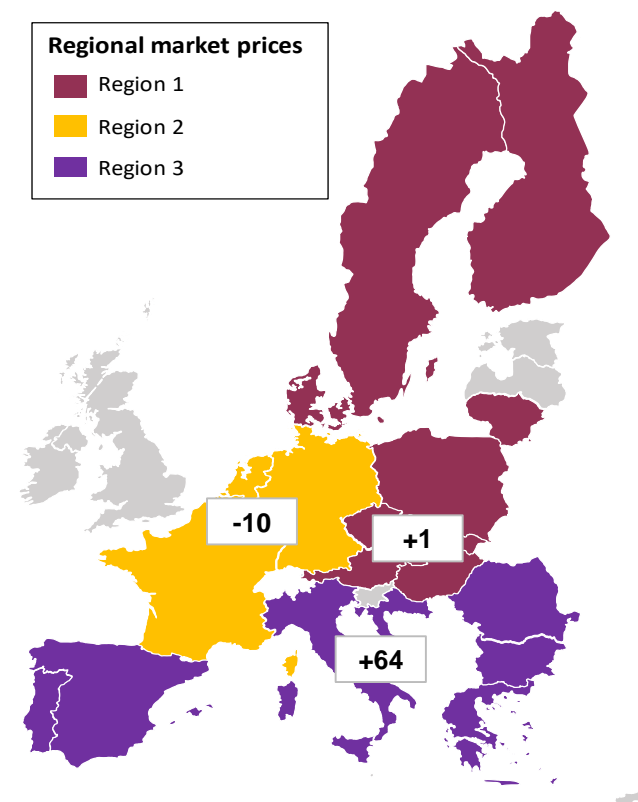
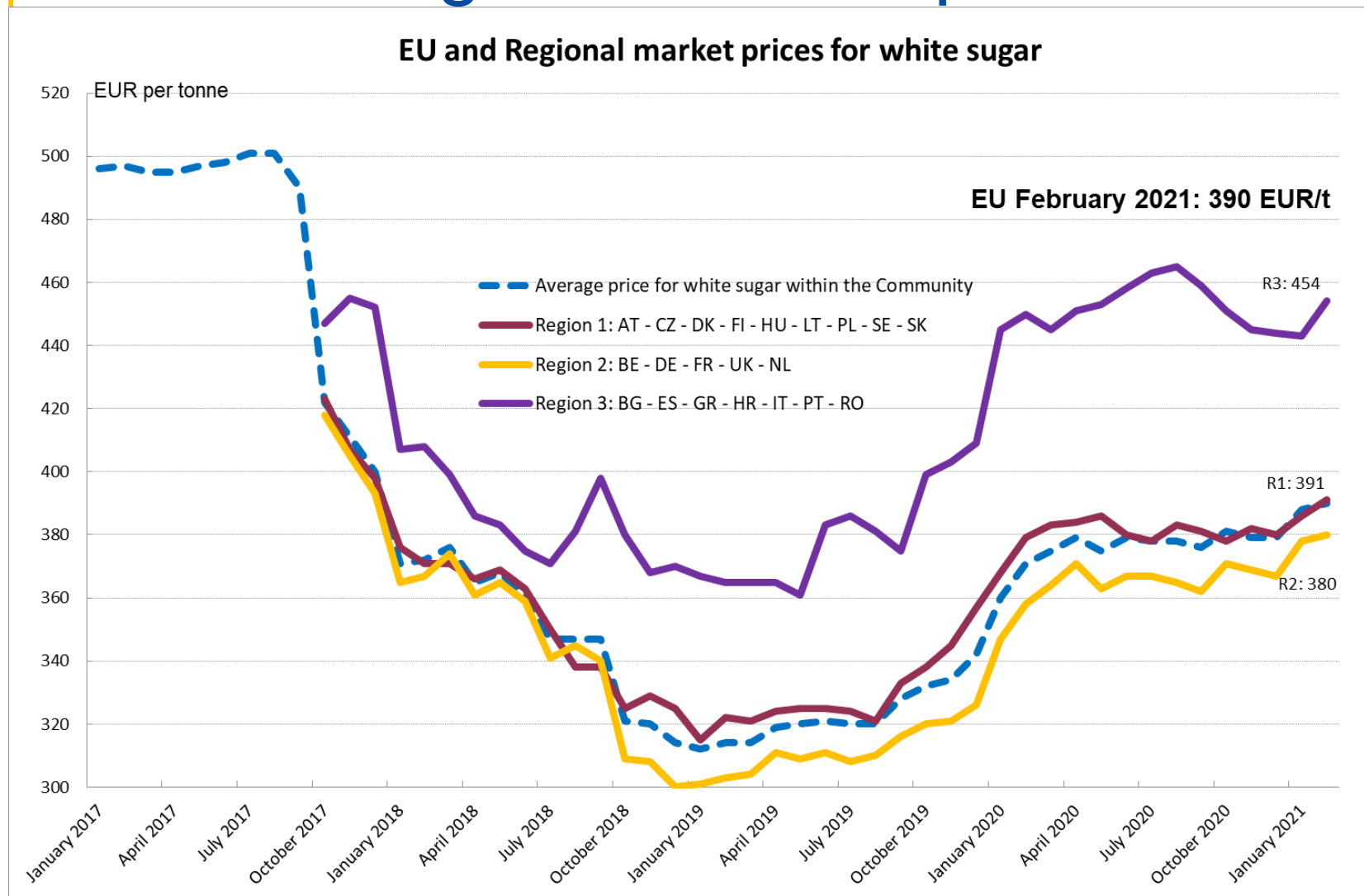
(1) Average weighted by quantities

(2) Standard deviation weighted by quantities

EU (EU27 + UK from Feb. 20 to Nov. 20)				
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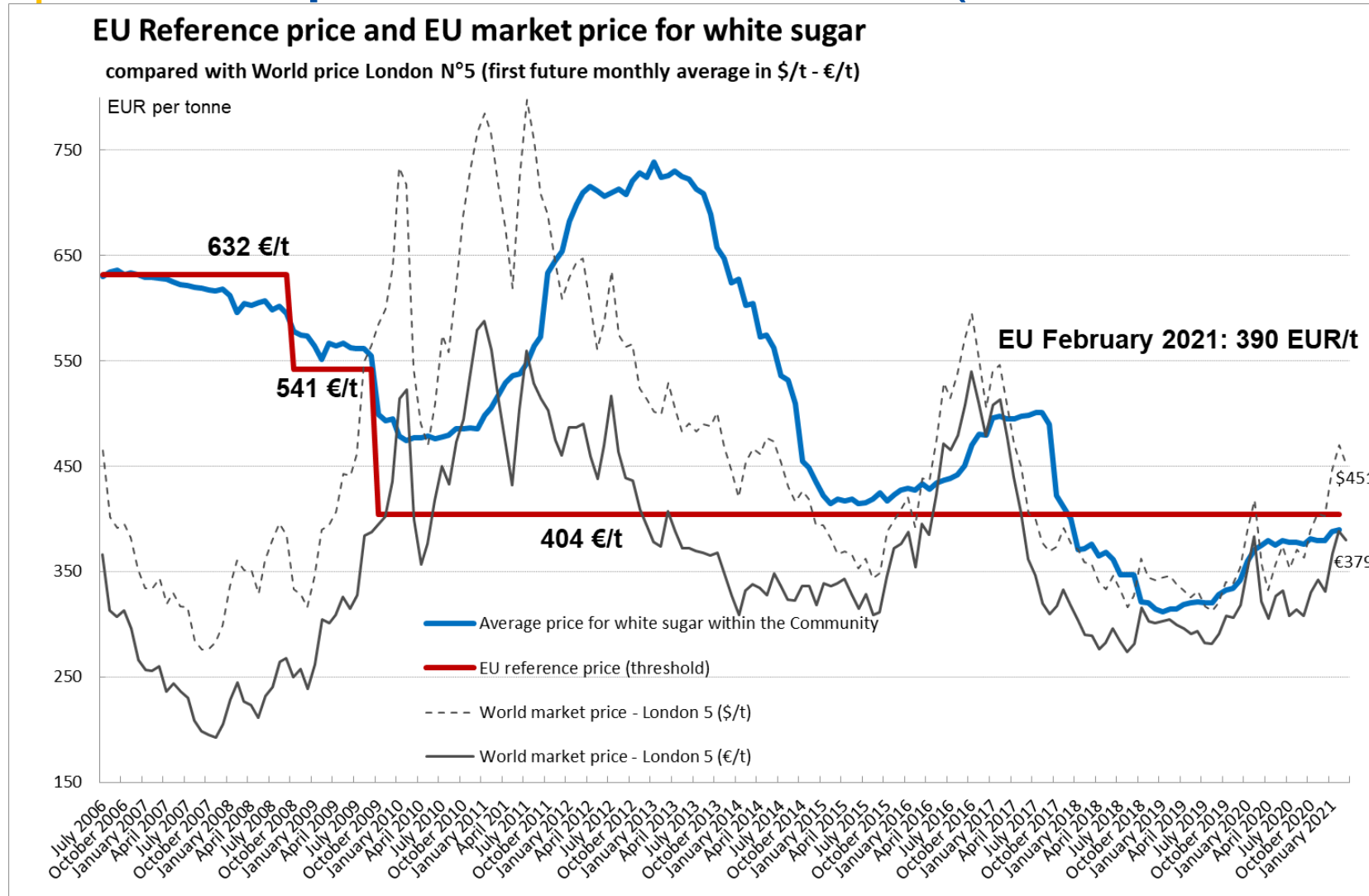
- + EUR 19 / tonne compared to previous year

EU and Regional market prices for white sugar



Differences between EU average price and regional average prices

EU market price for white sugar compared with World price London N°5 (first future - \$/t - €/t)

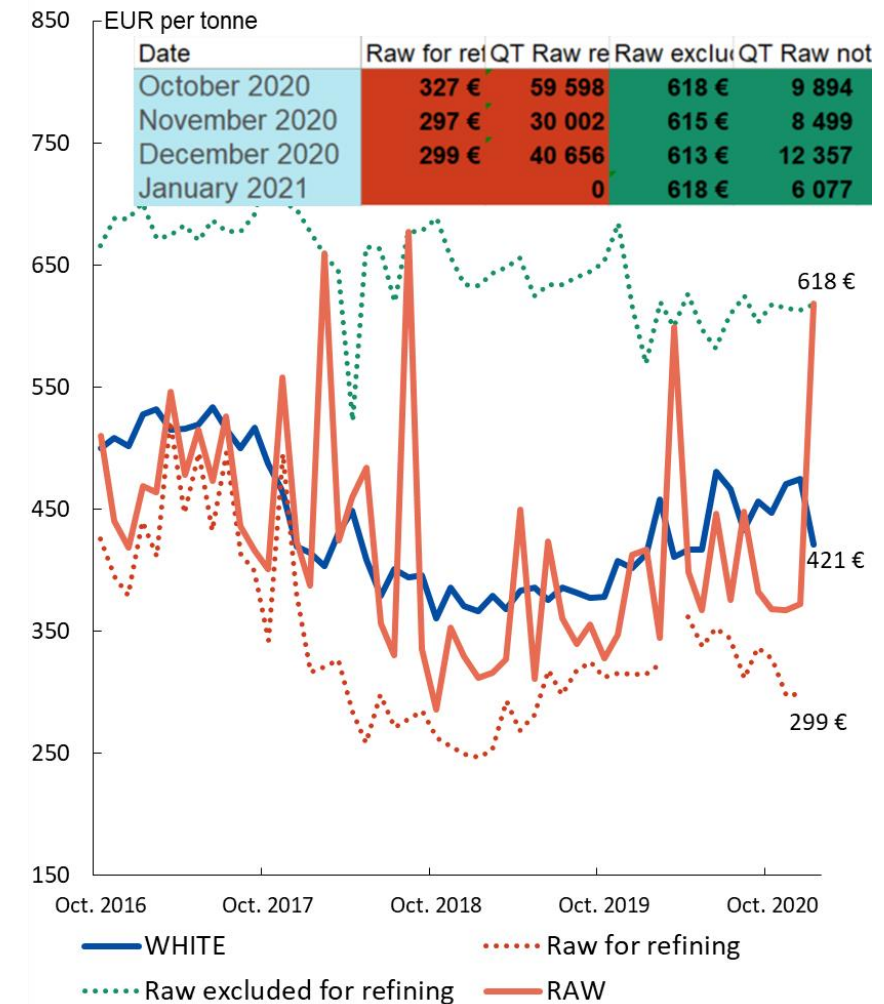
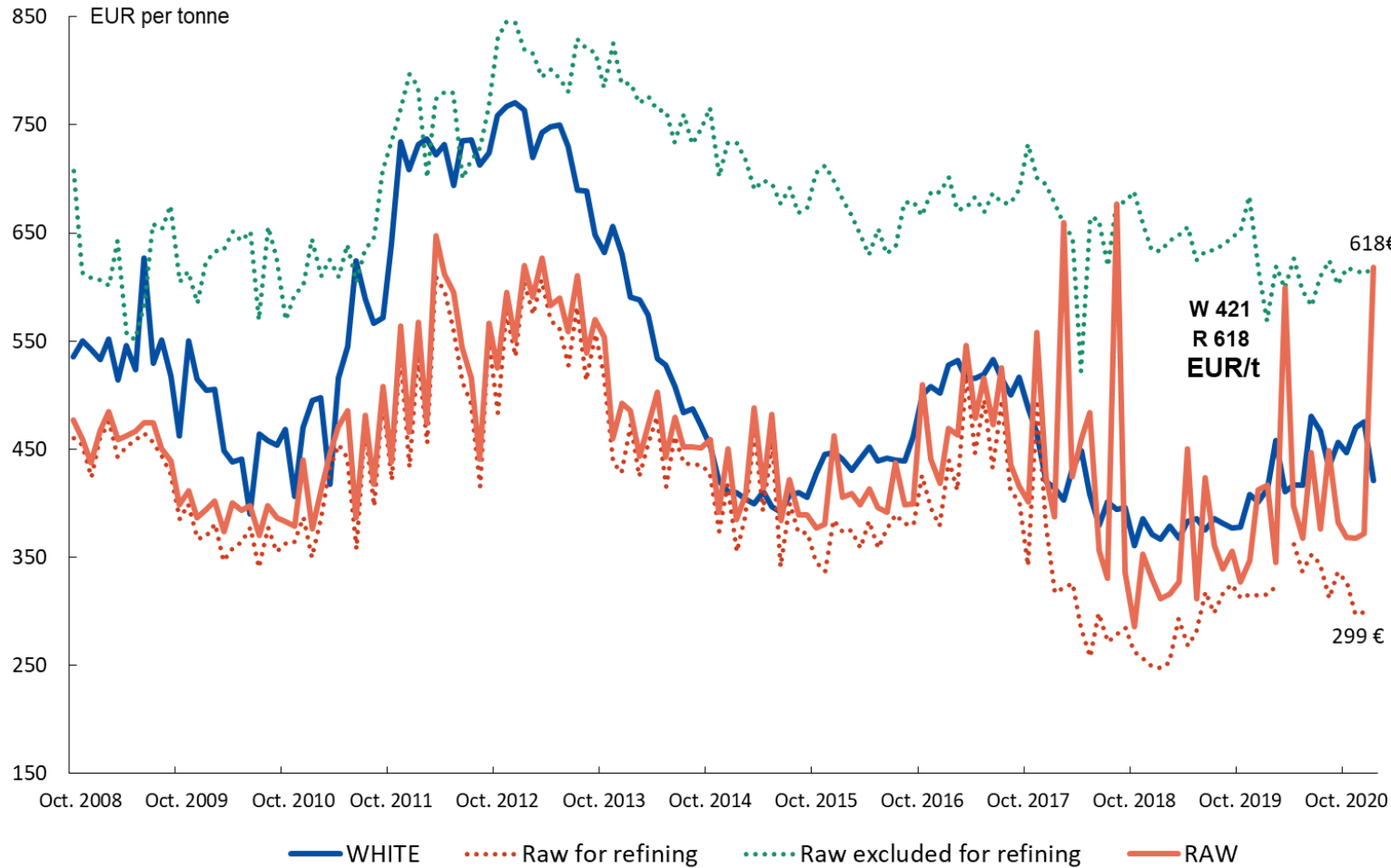


London N°5 (Mar. 2021):

- - EUR 9 per tonne compared to previous month (-2.3%)
- - EUR 4 per tonne compared to March 2020 (-1.0%)

EPA / EBA average import price

Average prices (CAF) for raw and white sugar imported from ACP countries



Sugar Beet Price

Average price for sugar beet

Average price for sugar beet :

R 2017/1185 Art 12 (a) - Annex II 1.

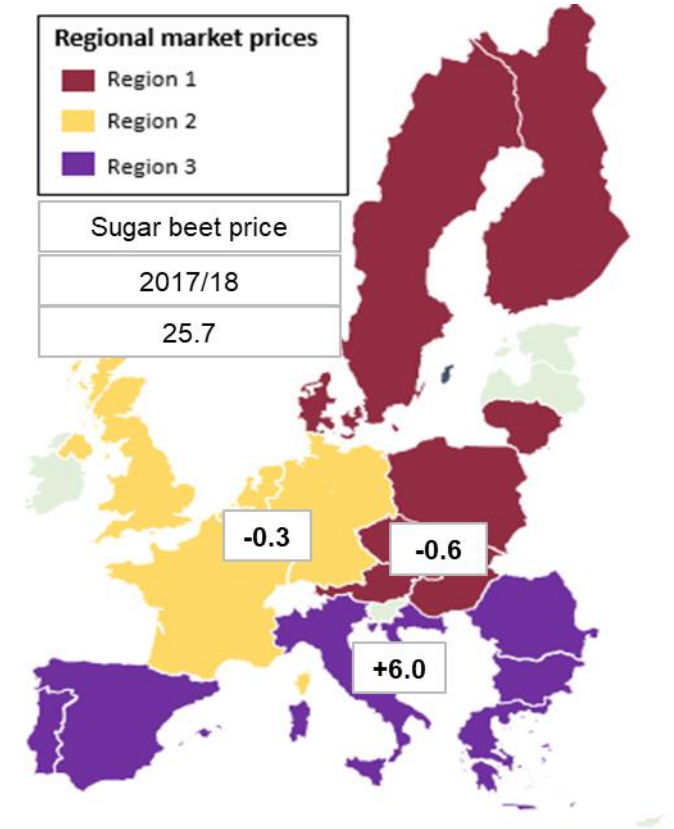
Reference period: 1/10/2017 to 30/09/2018

EU weighted average price: EUR 25.7/t

Region 1: EUR 25.1/t (AT – CZ – DK – FI – HU – LT – PL – SE – SK)

Region 2: EUR 25.4/t (BE – DE – FR – UK – NL)

Region 3: EUR 31.7/t (ES – HR – IT – RO)



Differences between EU average price
and regional average prices

Average price for sugar beet

Average price for sugar beet :

R 2017/1185 Art 12 (a) - Annex II 1.

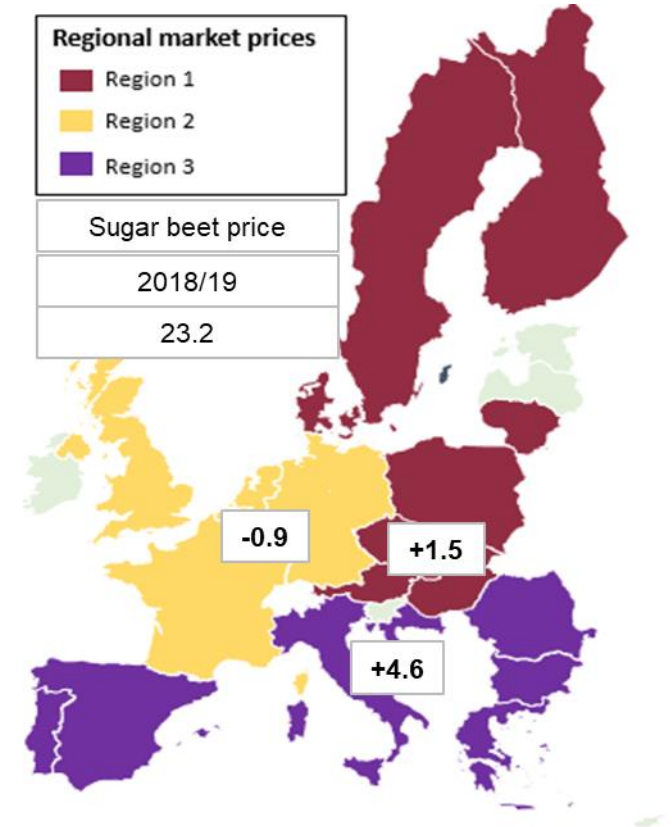
Reference period: 1/10/2018 to 30/09/2019

EU weighted average price: EUR 23.2/t (EUR -2.5/t or -10% compared to 2017/18)

Region 1: EUR 24.7/t (EUR -0.4/t -2%) (AT – CZ – DK – FI – HU – LT – PL – SE – SK)

Region 2: EUR 22.3/t (EUR -3.1/t -12%) (BE – DE – FR – UK – NL)

Region 3: EUR 27.8/t (EUR -3.9/t -12%) (ES – HR – IT – RO)



Differences between EU average price
and regional average prices

Average price for sugar beet

METHODOLOGY FOR THE ESTABLISHMENT OF SUGAR BEET PRICES

- The price shall be notified as follows:
 - one weighted average price per marketing year;
 - in national currency, per tonne;
 - taking account of all of the quantities purchased by sugar beet processors from beet growers in respect of the marketing year for which the price is notified;
 - converted to 16% equivalent sugar content.
- The total corresponding quantity of sugar beet shall be notified in tonnes.



EU Sugar Balance

AGRI G 4

Common Organisation of Agricultural Markets

19 April 2021 update

2020/2021 - Sugar Production – 24 Feb. 2021

Agri G 4
8 2 2

févr-21

Sugar production forecast of the 2020/21 MY (EU + UK)

(based on long term average or MS communications)

SUGAR production forecast 2020/21					SUGAR production forecast 2020/21				
<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b)	Production of the campaign (c) = (a) * (b)	% increase compared to 2019/2020	<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b)	Production of the campaign (c) = (a) * (b)	% increase compared to 2019/2020
BE	57.2	13.3	761 540		HU	11.7	8.9	104 400	
BG					NL	83.5	13.1	1 092 000	0%
CZ	57.1	9.7	555 000	6%	AT	26.3	12.2	320 000	6%
DK	33.3	11.8	392 738	9%	PL	251.9	7.9	2 000 000	-3%
DE	349.8	11.7	4 105 342	-5%	PT (Continent)		0.0	0	
EL			0		PT (Açores)		0.0	0	
ES	28.0	13.6	380 000	-7%	RO	23.1	6.3	144 754	
FR (Met.)	362.5	9.4	3 400 000	-32%	SK	22.3	7.9	177 146	11%
FR (Dom.)		0.0	200 000	-8%	FI	11.5	6.0	69 200	
HR	12.0	10.5	126 000	18%	SE	29.8	10.5	311 161	8%
IT	28.2	7.9	223 000	22%	TOTAL EU	1 403	10.3	14 499 799	-11%
LT	14.7	9.4	137 518		UK	92.0	11.6	900 000	-24%
					TOTAL	1 495	10.3	15 399 799	-12%

Note to the Delegates:

Please check sugar productions and send comments to AGRI-G4@ec.europa.eu Kind Regards.

2020/2021 - Sugar Production – 24 Mar. 2021

Agri G 4
8 2 2

mars-21

Sugar production forecast of the 2020/21 MY (EU + UK)
(based on long term average or MS communications)

SUGAR production forecast 2020/21					SUGAR production forecast 2020/21				
<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b)	Production of the campaign (c) = (a) * (b)	% increase compared to 2019/2020	<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b)	Production of the campaign (c) = (a) * (b)	% increase compared to 2019/2020
BE	57.2	13.3	761 540		HU	11.7	8.9	104 400	
BG					NL	83.5	13.1	1 092 000	0%
CZ	57.1	9.7	404 000	-23%	AT	26.3	12.2	320 000	6%
DK	33.3	11.8	392 738	9%	PL	251.9	7.9	2 000 000	-3%
DE	349.8	11.7	4 153 654	-4%	PT (Continent)		0.0		
EL					PT (Açores)		0.0		
ES	28.0	13.6	365 924	-10%	RO	23.1	6.3	144 754	
FR (Met.)	362.5	9.4	3 445 417	-31%	SK	22.3	7.9	161 137	1%
FR (Dom.)		0.0	164 505	-24%	FI	11.5	6.0	67 189	
HR	12.0	10.5	126 000	18%	SE	29.8	10.5	315 847	10%
IT	28.2	7.9	223 000	22%	TOTAL EU	1 403	10.3	14 398 362	-11%
LT	14.7	9.4	156 257		UK	92.0	11.6	900 000	-24%
					TOTAL	1 495	10.3	15 298 362	-12%

Note to the Delegates:

Please check sugar productions and send comments to AGRI-G4@ec.europa.eu Kind Regards.

2020/2021 - Sugar Production – 13 Apr. 2021

Agri G 4
8 2 2

avr-21

Sugar production forecast of the 2020/21 MY (EU + UK)
(based on long term average or MS communications)

SUGAR production forecast 2020/21					SUGAR production forecast 2020/21				
<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b)=(c)/(a) (5-y avg.)	Production of the campaign (c)	% increase compared to 2019/2020	<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b)	Production of the campaign (c) = (a) * (b)	% increase compared to 2019/2020
BE	57.2	12.7 (13.3)	726 506	-8%	HU	11.7	7.8 (6.3)	91 065	5%
BG					NL	83.5	13.1 (7.9)	1 092 000	0%
CZ	57.1	9.0 (10.2)	515 429	-1%	AT	26.3	11.7 (5.8)	309 180	2%
DK	33.3	12.7 (11.8)	422 799	17%	PL	251.9	7.9 (10.1)	1 987 127	-4%
DE	349.8	11.9 (11.9)	4 153 654	-4%	PT (Continent)				
EL					PT (Açores)				
ES	28.0	13.1 (14.4)	365 924	-10%	RO	23.1	5.0 (0.0)	115 564	-16%
FR (Met.)	362.5	9.5 (12.8)	3 445 417	-31%	SK	22.3	7.2 (0.0)	161 640	1%
FR (Dom.)			164 505	-24%	FI	11.5	5.8 (10.1)	67 189	-9%
HR	12.0	10.5 (9.1)	125 897	18%	SE	29.8	10.6 (0.0)	315 847	10%
IT	28.2	7.9 (7.1)	223 620	23%	TOTAL EU	1 403	10.3	14 439 619	-11%
LT	14.7	10.6 (9.4)	156 257	-6%	UK	92.0	11.6	900 000	-24%
					TOTAL	1 495	10.3	15 339 619	-12%

Sugar and Isoglucose balance sheet

Marketing year 2020/21 – update 13 Apr. 2021

Final		Final		Final		Forecast		
2017/18 (oct-sept)		2018/19 (oct-sept)		2019/20 (oct-sept)		2020/21 (oct-sept)		x 1000 tonnes wse
EU 28		EU 28		EU + UK		EU (27 MS from 1/10/20 to 30/9/21)		
Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	
2 174	29	2 423	27	1 829	18	2 160	13	1 Beginning stocks
21 317	602	17 631	561	17 456	566	14 440	570	2 Production
1 869 1 287 583	10	2 489 1 910 579	5	2 434 1 848 586	1	2 300 1 600 700	5	3 Imports 3 1 - as such 3 2 - in processed products
25 360	641	22 542	592	21 719	585	18 900	588	4 TOTAL AVAILABLE 4 = 1 + 2 + 3
17 977 850 900 16 227	570	17 379 800 750 15 829	529	16 926 800 775 15 351	527	14 800 800 600 13 400	529	5 Consumption/disappearance of which industrial use of which bioethanol other
4 961 3 353 1 608	45	3 334 1 610 1 724	45	2 432 795 1 637	45	2 950 850 2 100	45	6 Exports 6 1 - as such 6 2 in processed products
2 423	27	1 829	18	2 360	13	1 150	15	7 Ending stocks
25 360	641	22 542	592	21 719	585	18 900	588	8 TOTAL OUTLETS 8 = 5 + 6 + 7 = 4

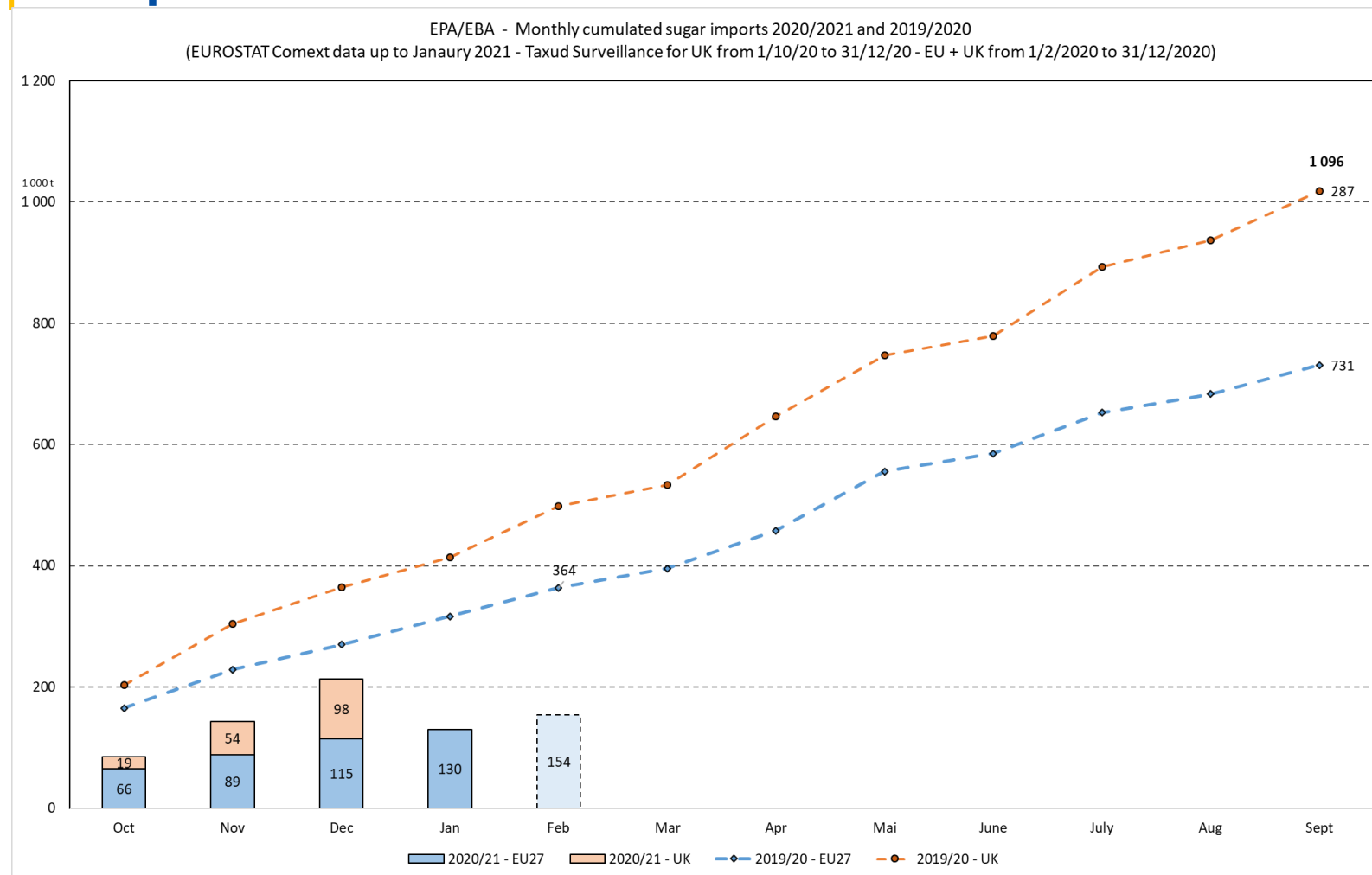


Sugar Trade statistics

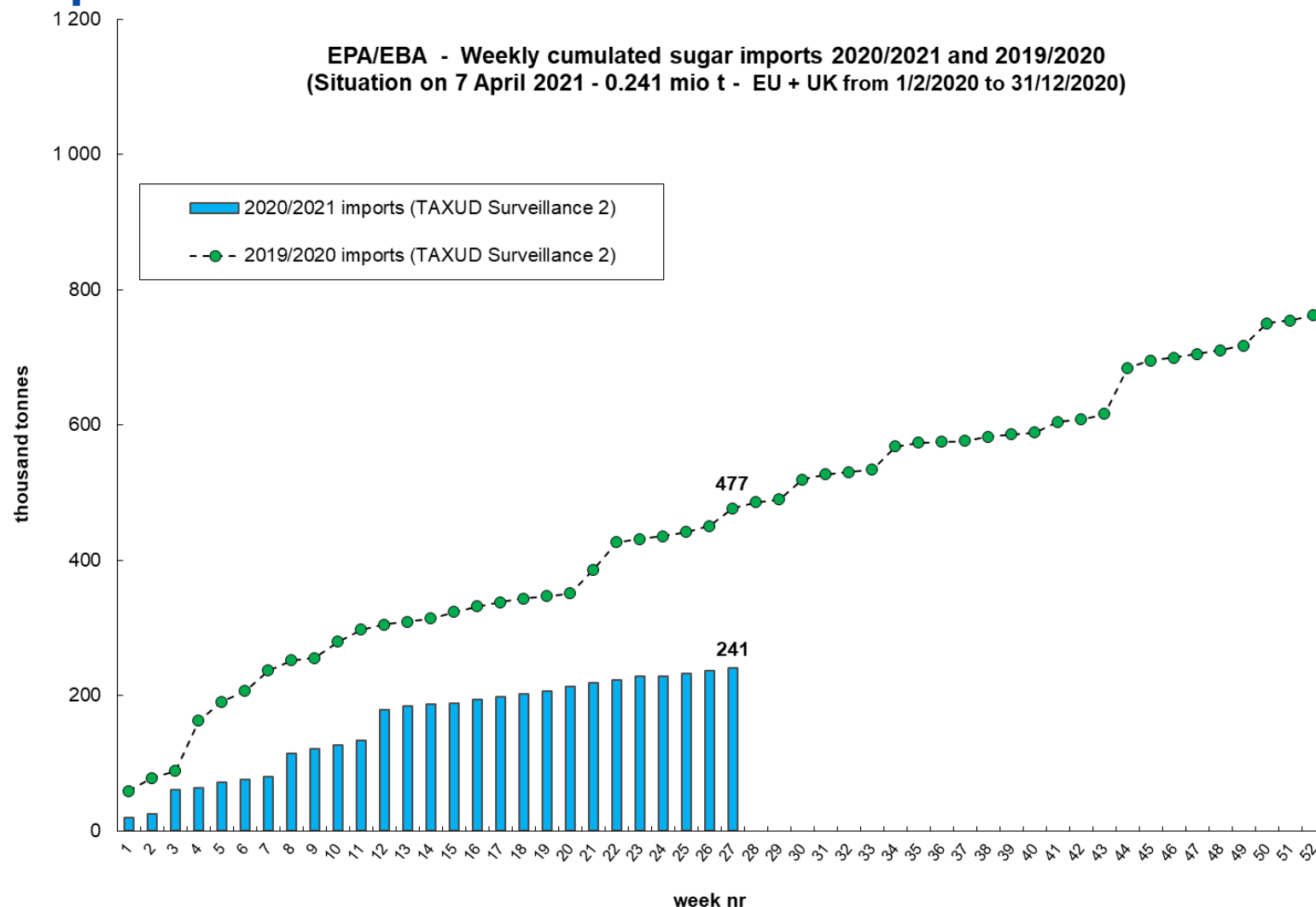
AGRI G 4 - Committee for the
Common Organisation of Agricultural Markets

19 April 2021

Imports EPA / EBA in 2020/2021



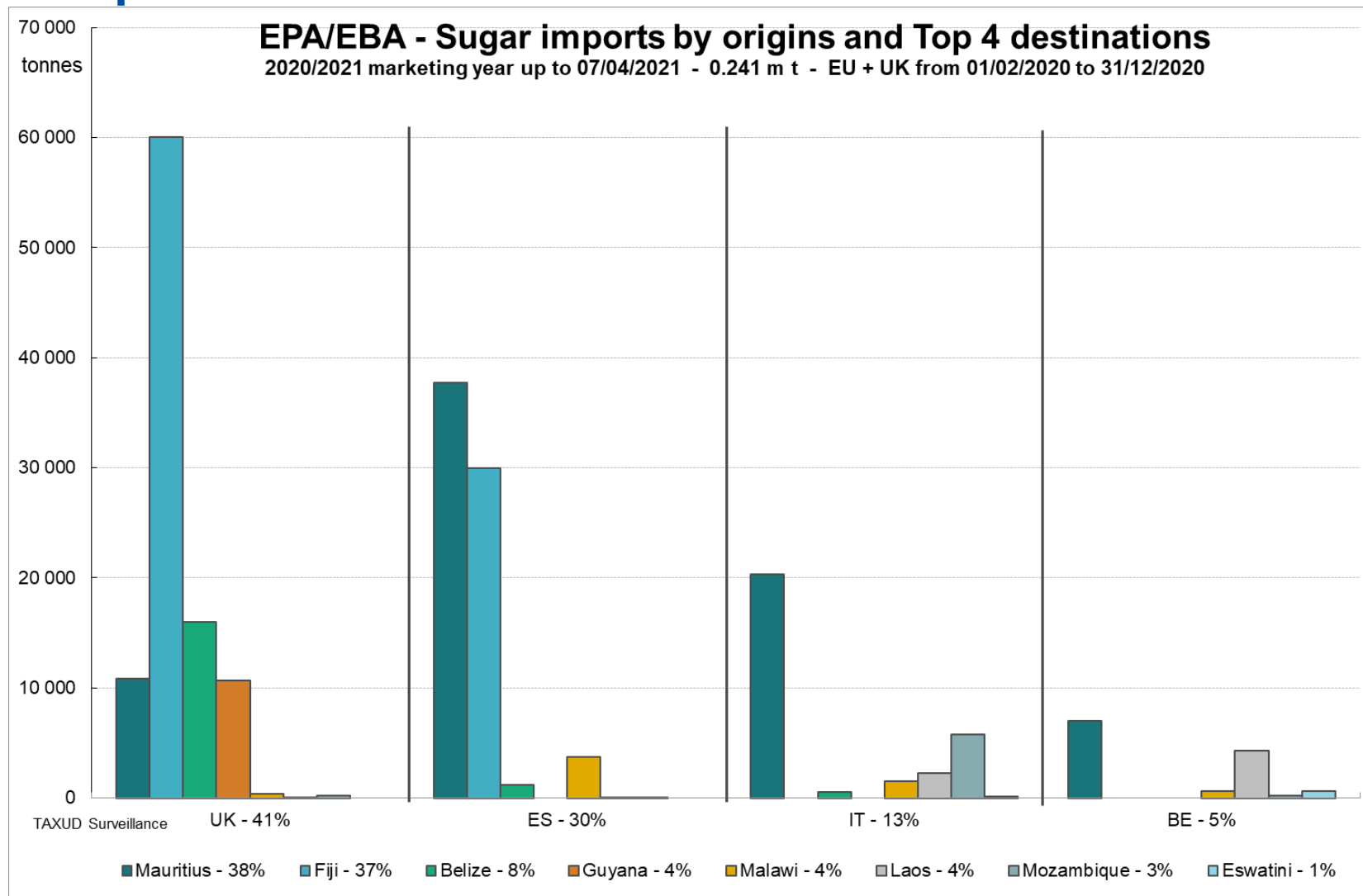
Imports EPA / EBA in 2020/2021



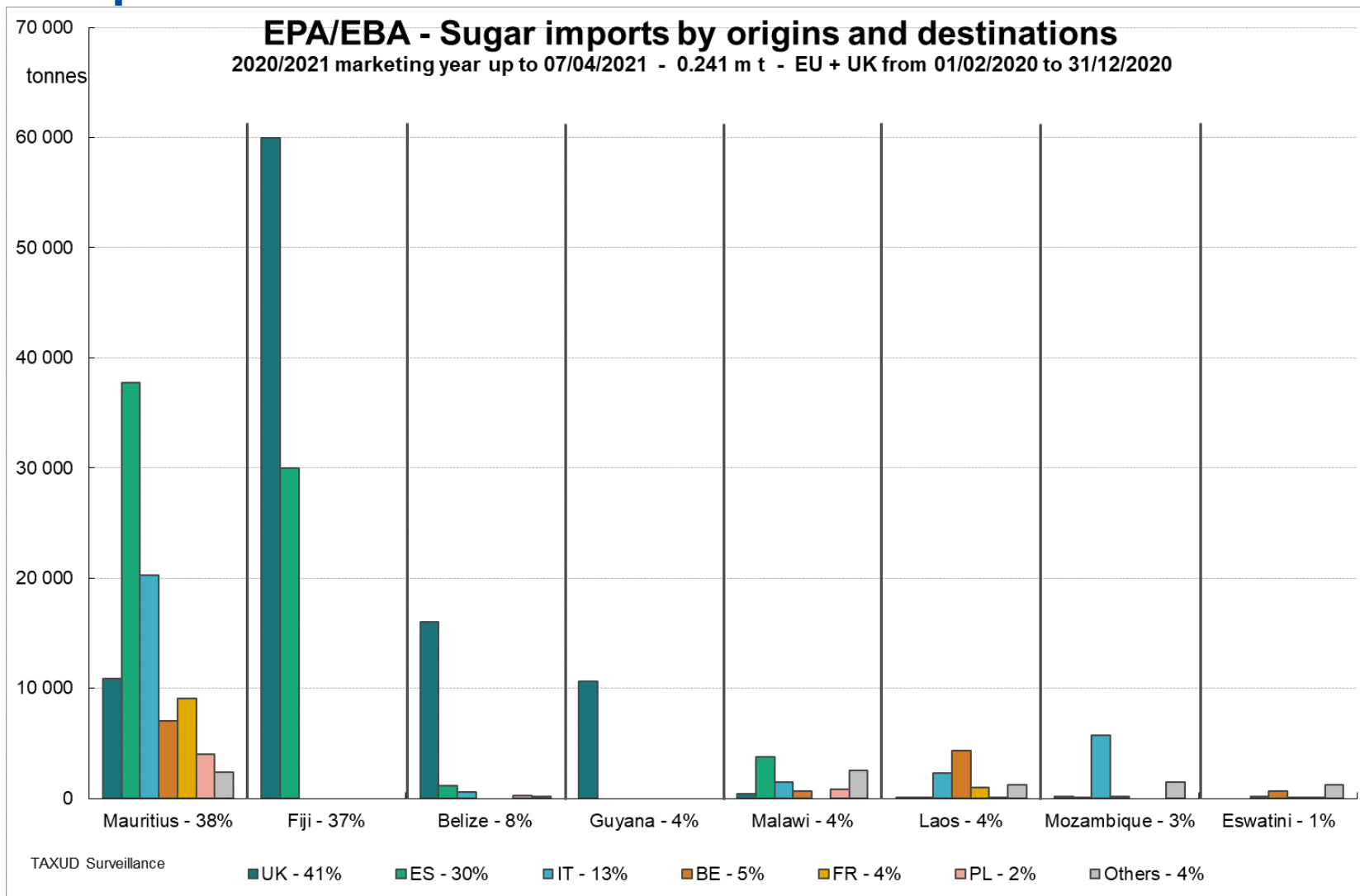
Source: DG TAXUD - DG AGRI.

- EPA /EBA imports are very low compared to last year

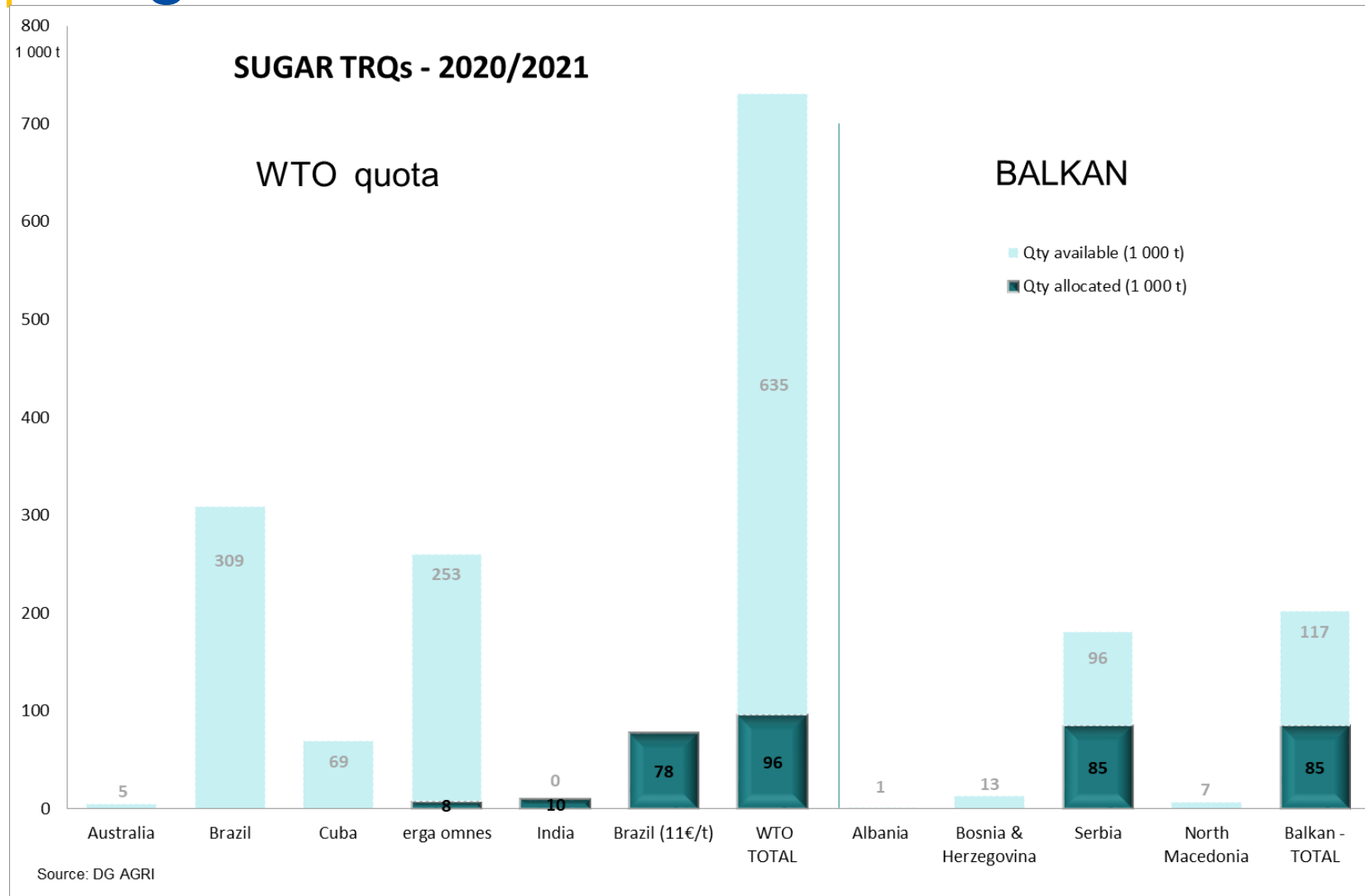
Imports EPA / EBA in 2020/2021



Imports EPA / EBA in 2020/2021

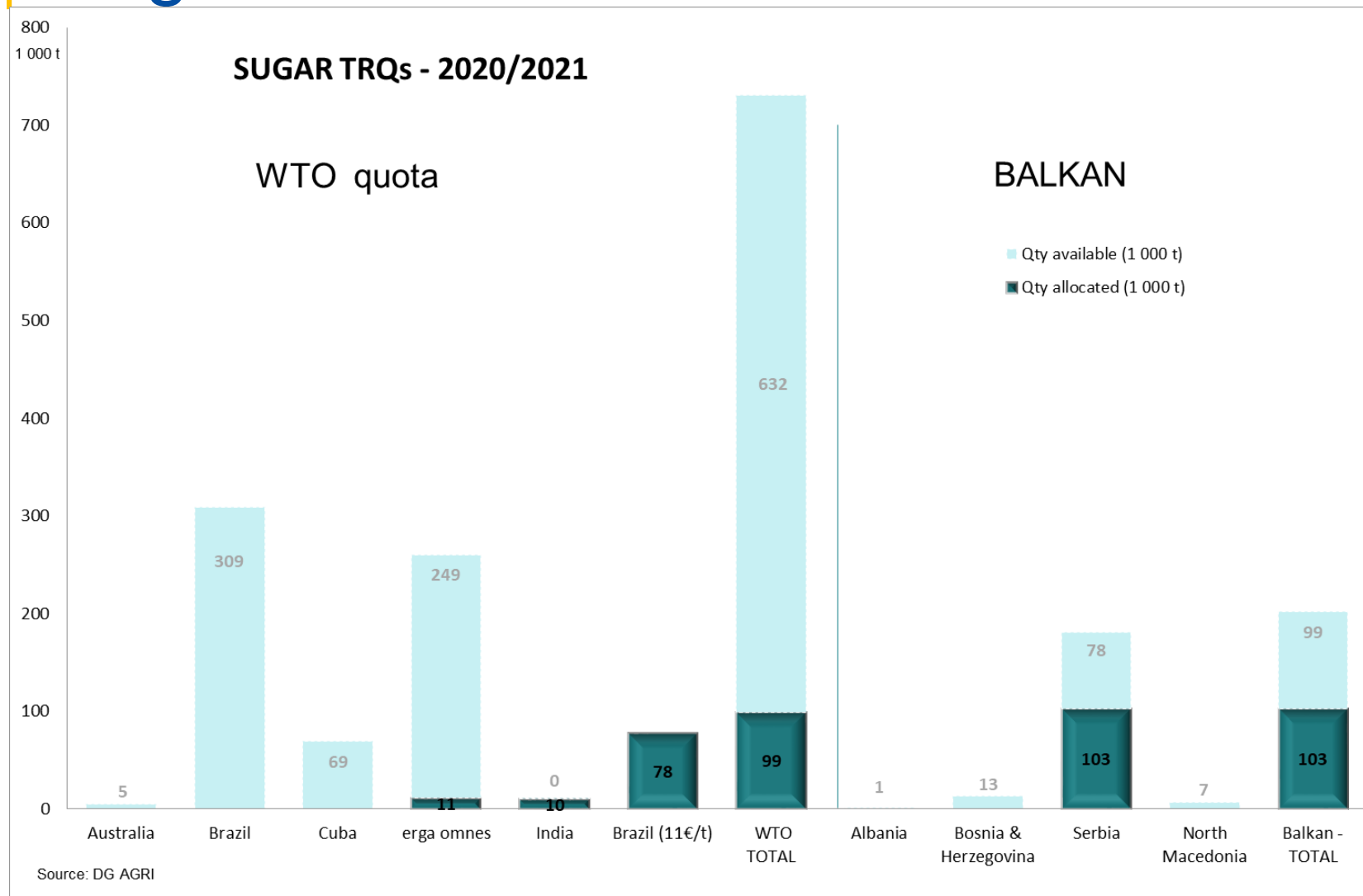


Sugar TRQs 2020-2021 (EU + UK from 1/2/20 to 31/12/20) (22/2/2021)



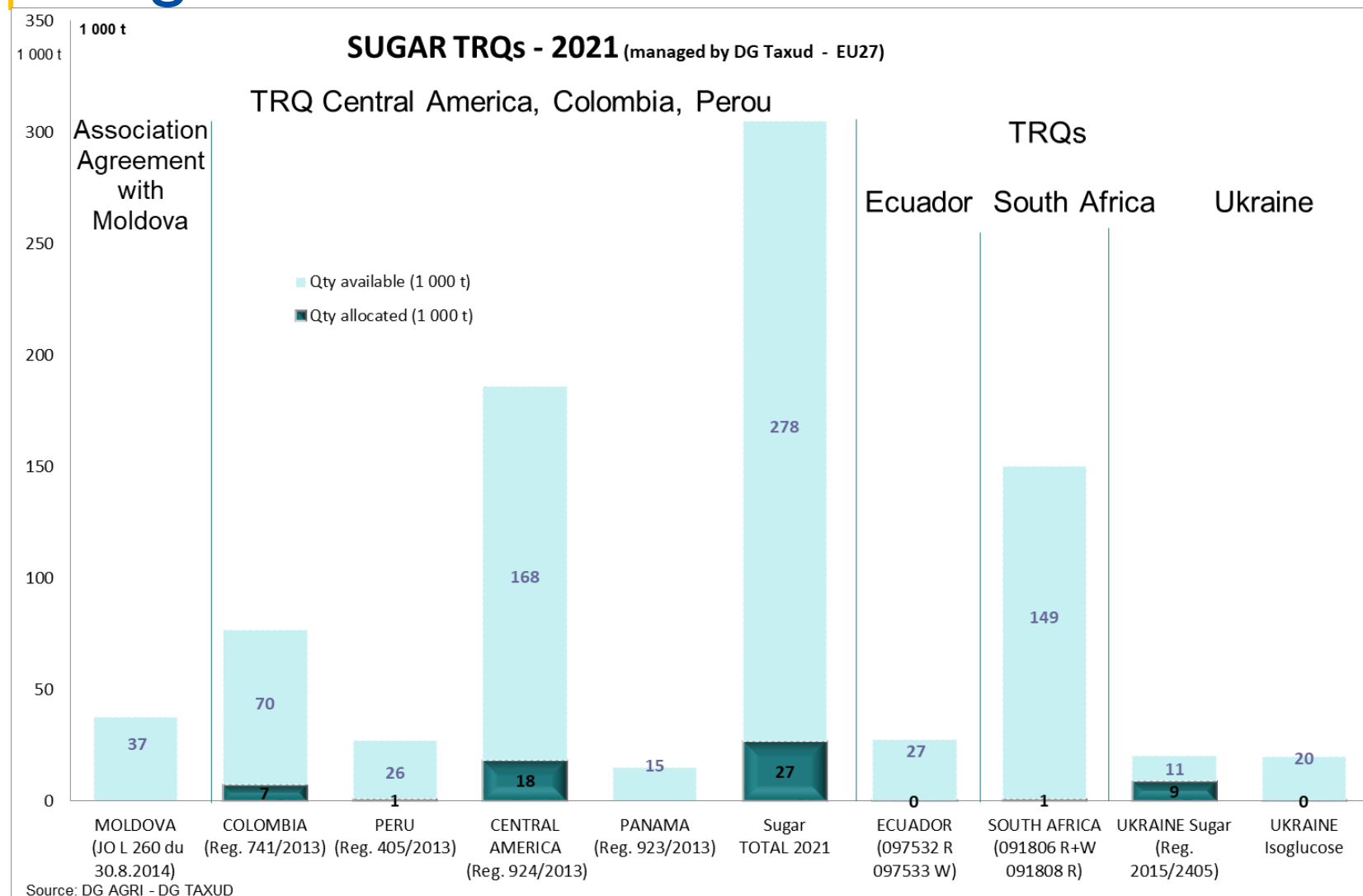
- **Brexit
apportionment:**
- Australia
4 961 t (- 4 964 t)
- Brazil
308 518 (- 25 536 t)
- Erga omnes
260 389 t (- 29 588 t)

Sugar TRQs 2020-2021 (EU + UK from 1/2/20 to 31/12/20) (23/03/2021)

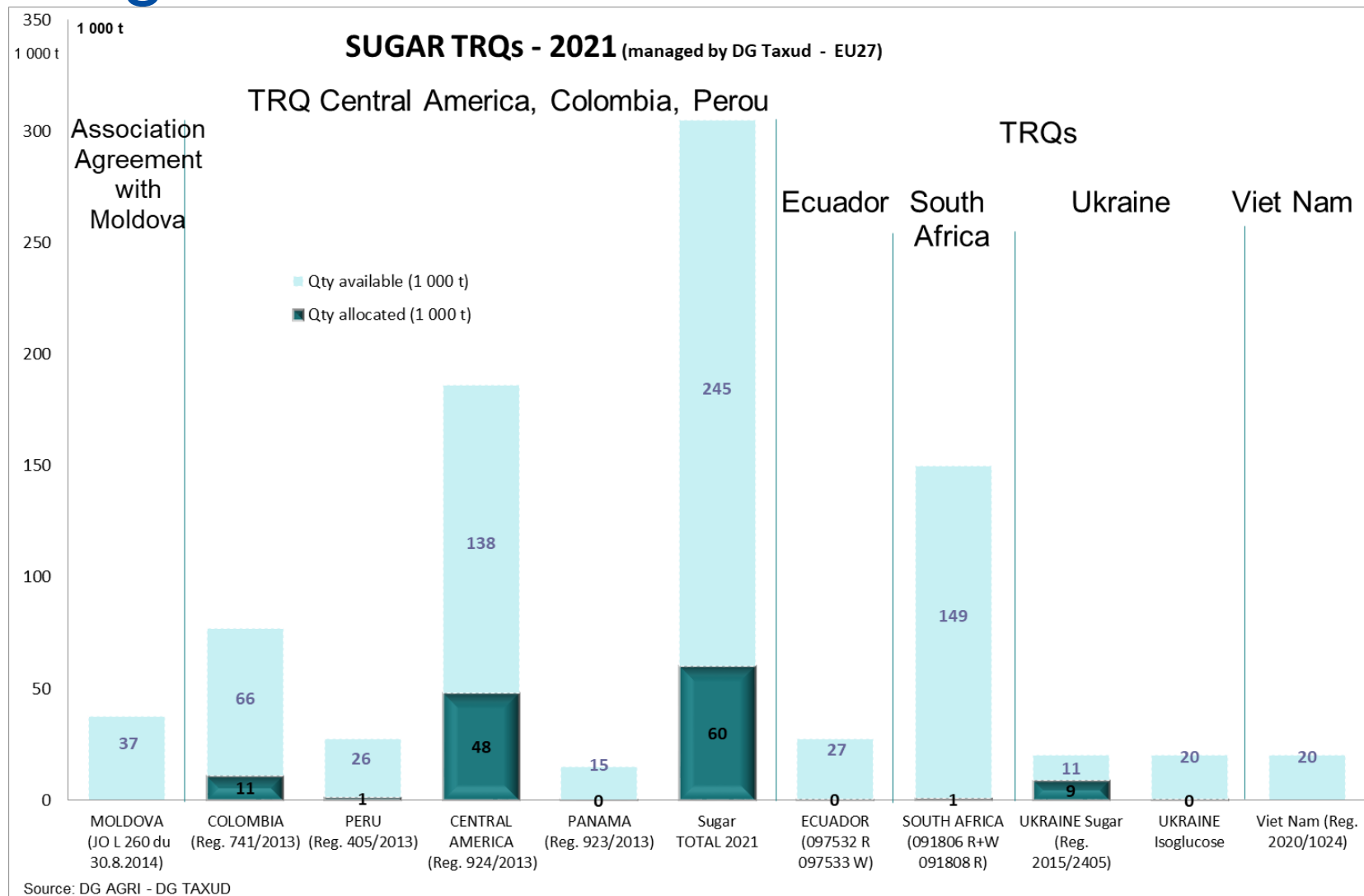


- **Brexit**
apportionment:
- Australia
4 961 t (- 4 964 t)
- Brazil
308 518 (- 25 536 t)
- Erga omnes
260 389 t (- 29 588 t)

Sugar TRQs 2020-2021 (EU 27) (19/2/2021)



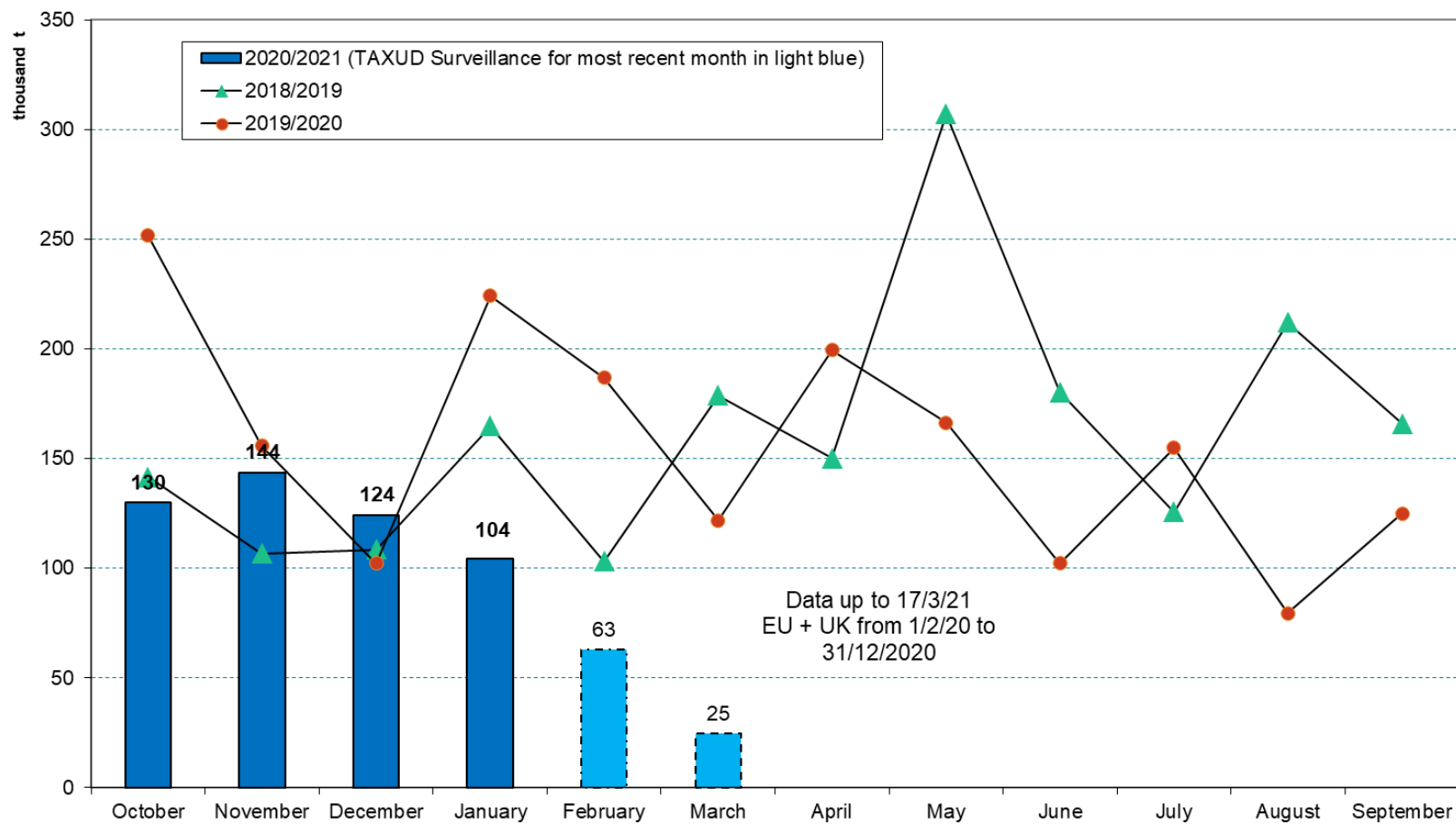
Sugar TRQs 2020-2021 (EU 27) (22/03/2021)



EU Sugar Imports

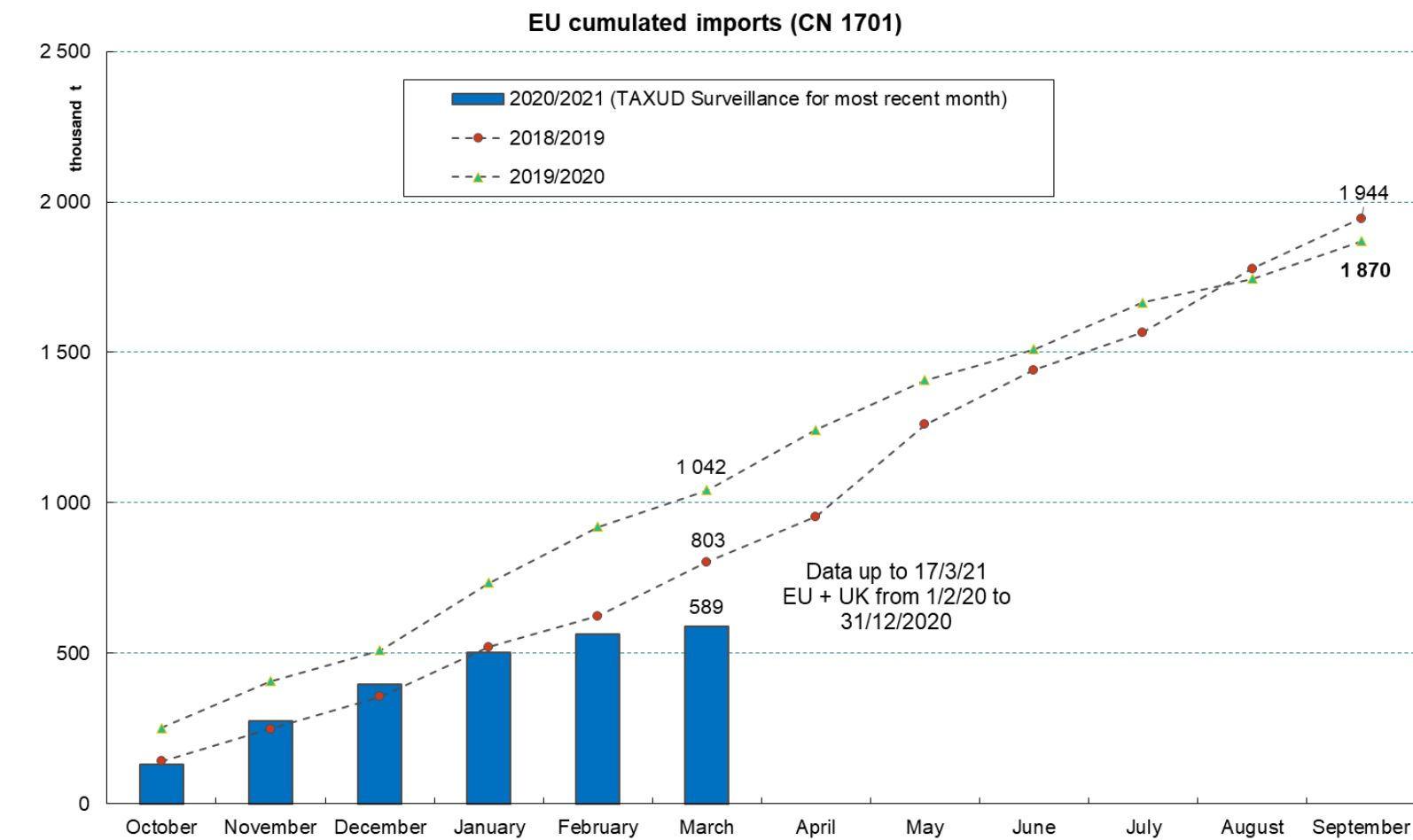
EU Total imports

EU Monthly sugar imports (CN 1701)



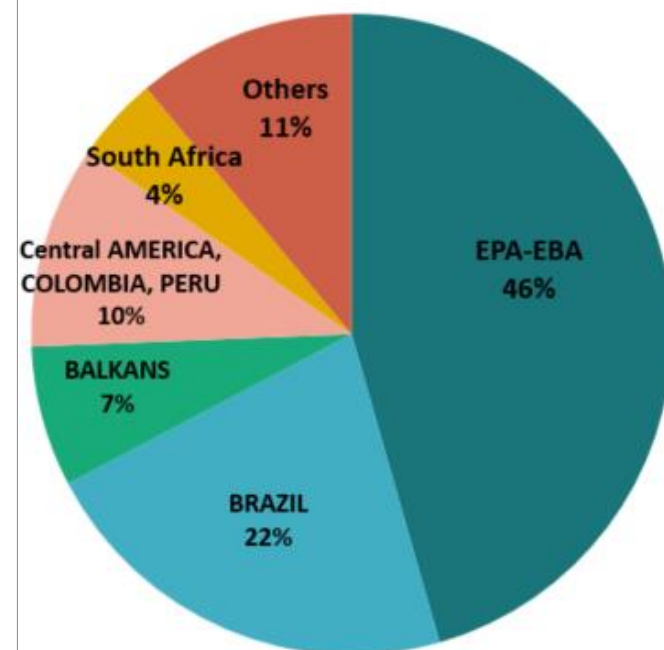
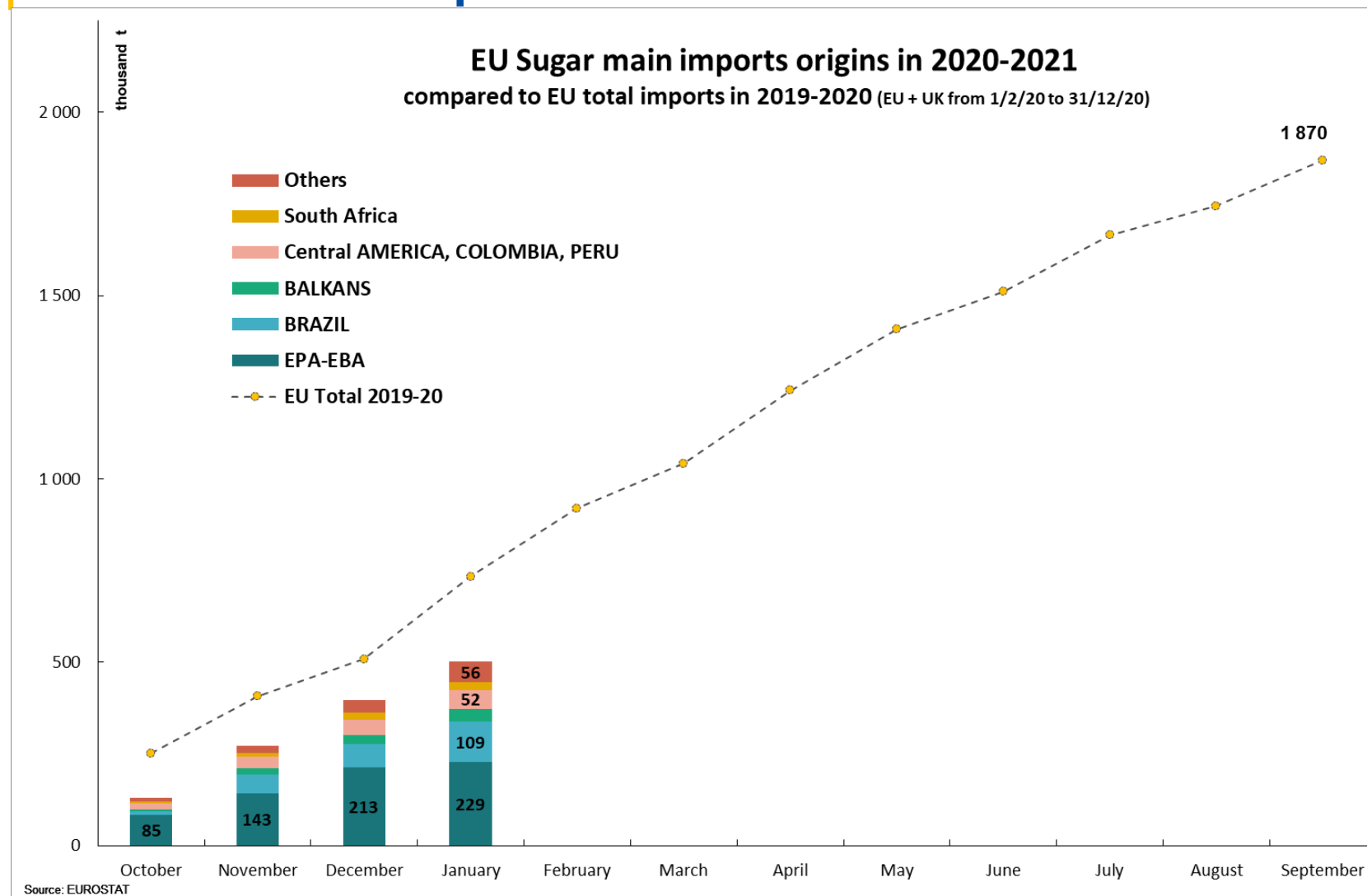
Sources: EUROSTAT - DG TAXUD

EU Total imports



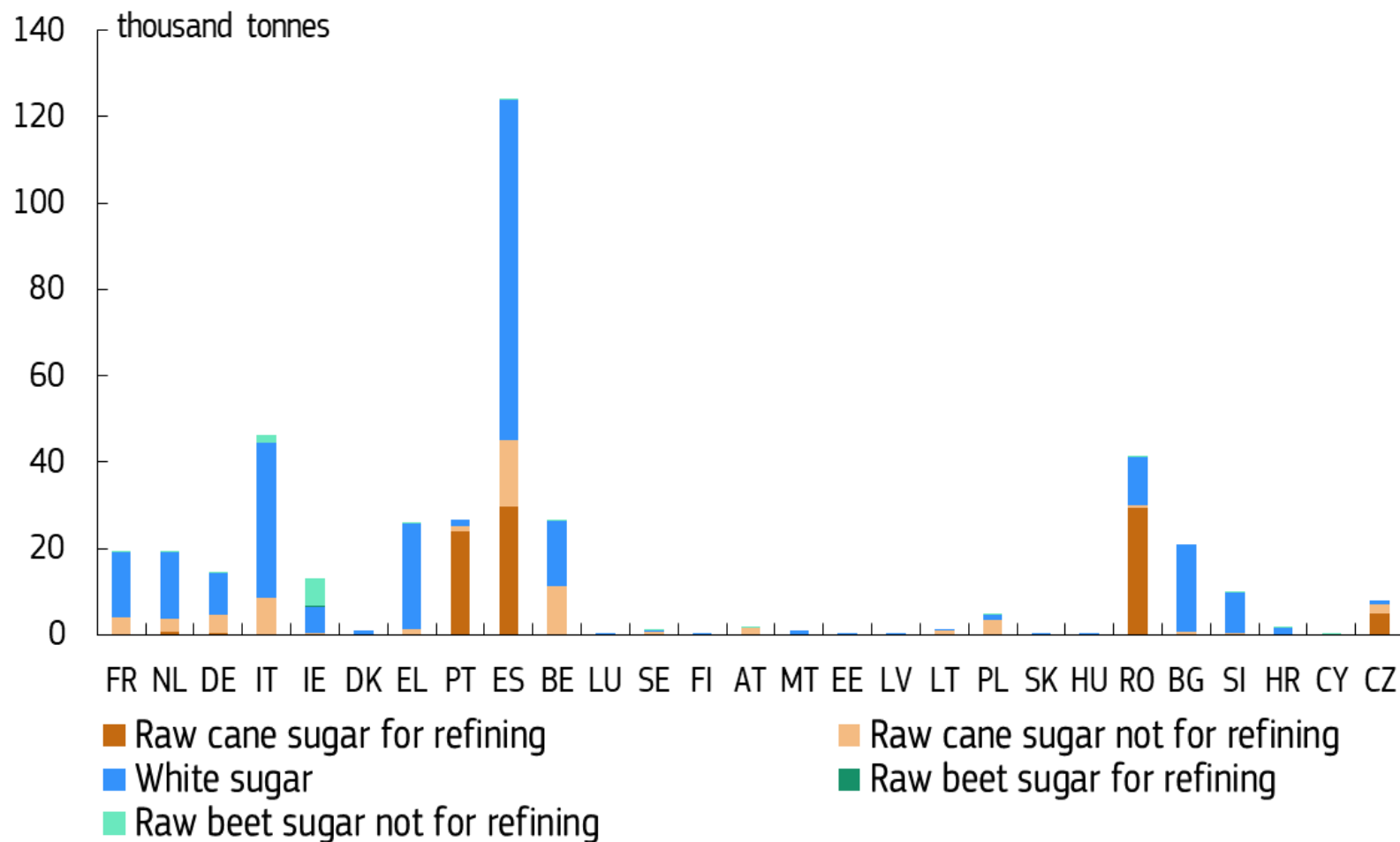
Source: EUROSTAT

EU Total imports



- By end of January 2021 EPA/EBA origins are representing 46% of total imports.

EU Total imports (2020/2021 - 4 m. - 0.407 m t - EU 27 MS)



Top five importers of sugar (65% share)

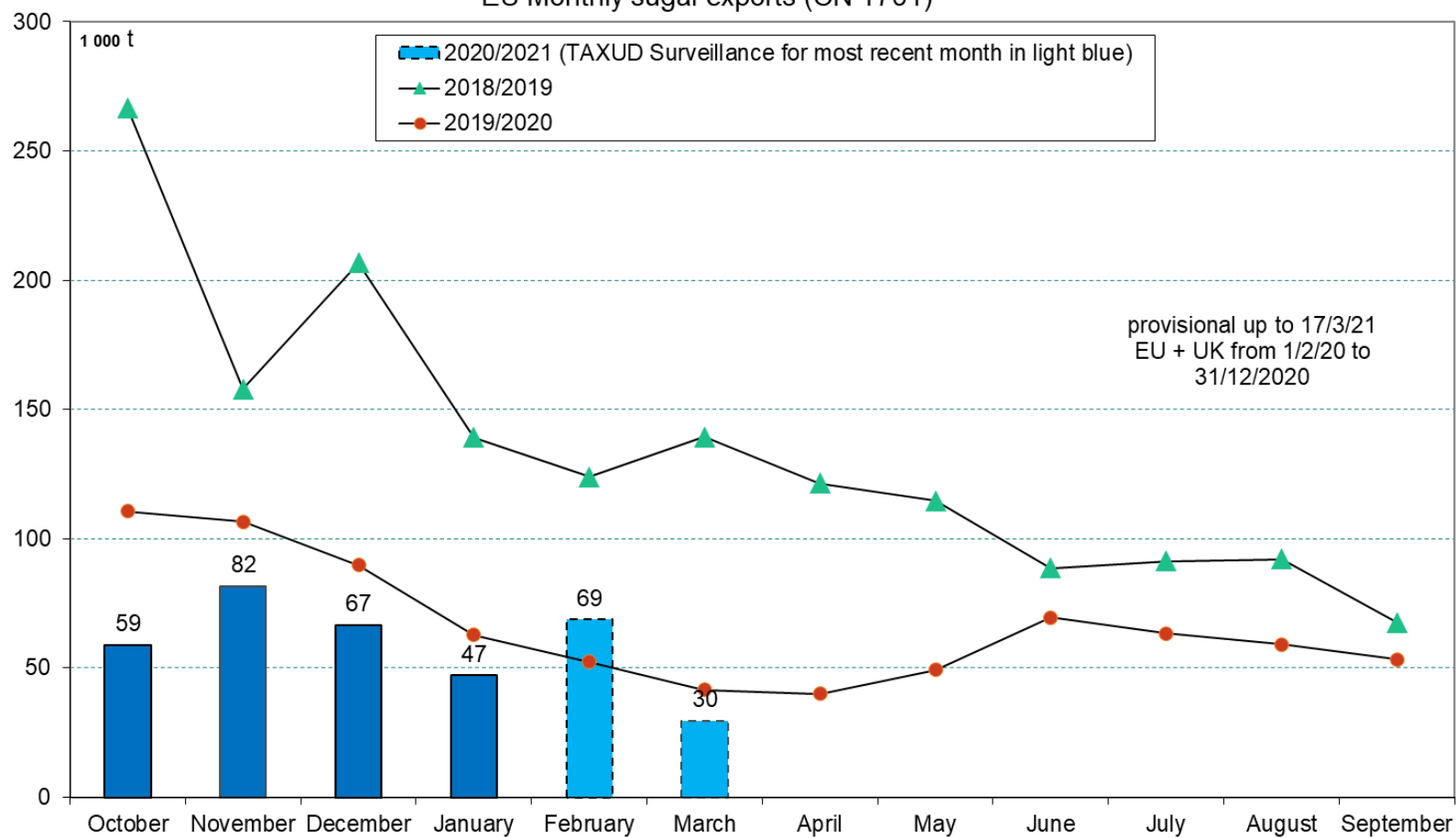
	Volume (^{'000} tonnes)	Share (%)
Spain	124	30
Italy	46	11
Romania	41	10
Portugal	27	7
Belgium	26	6
Total EU	407	

Source: EUROSTAT

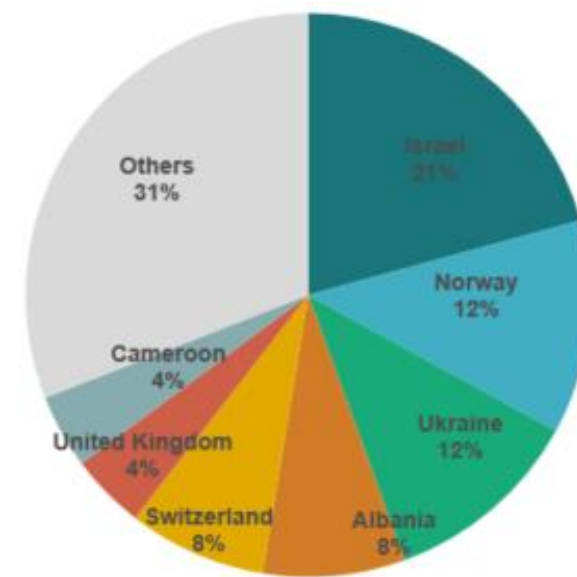
EU Sugar Exports

EU Total exports

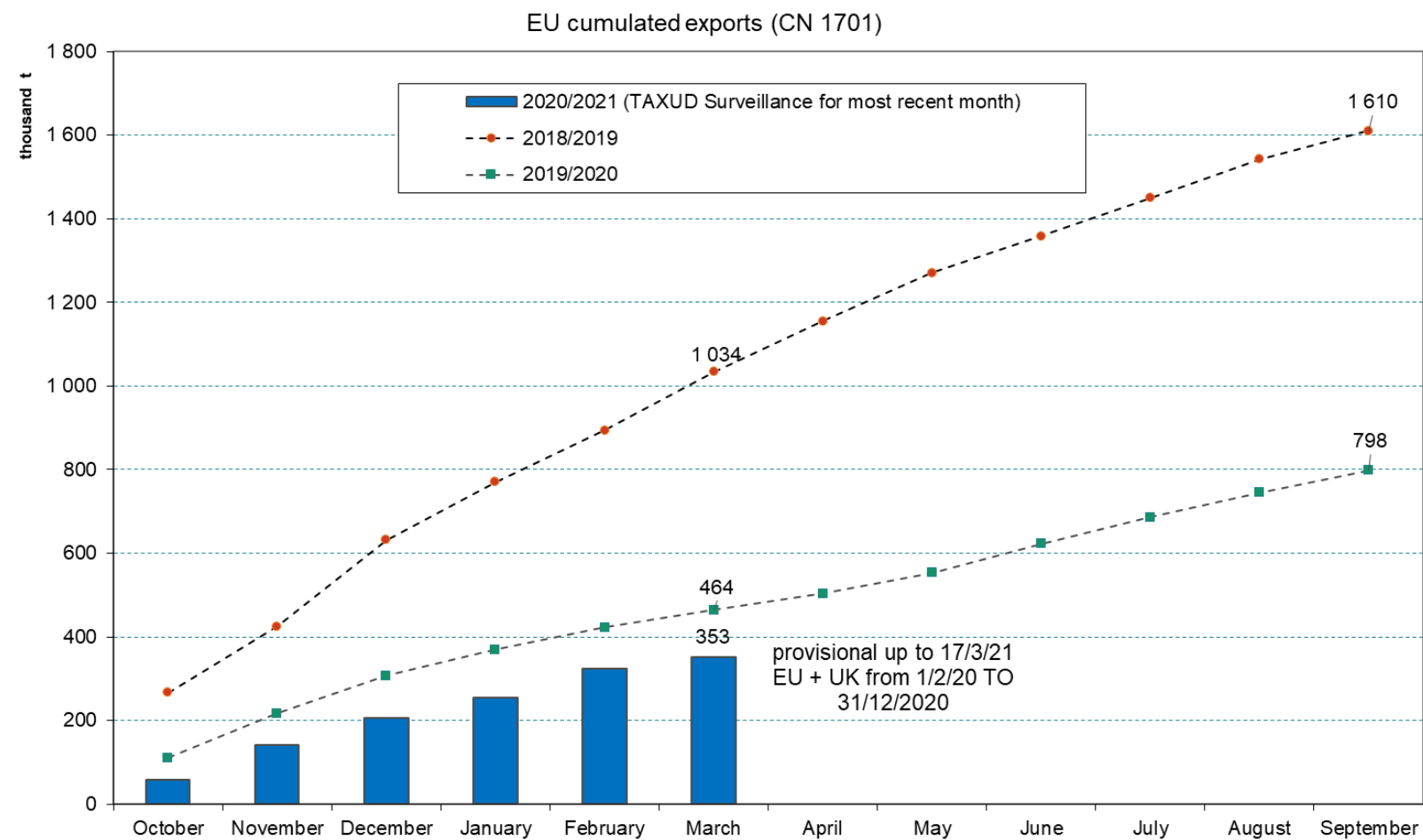
EU Monthly sugar exports (CN 1701)



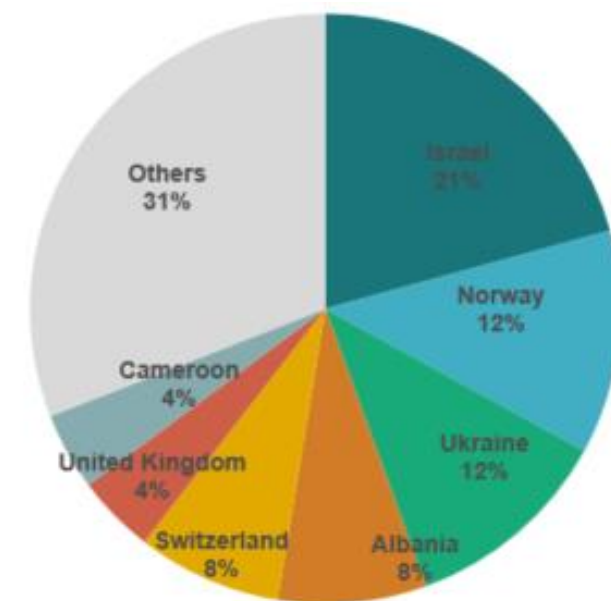
Source: EUROSTAT - DG TAXUD



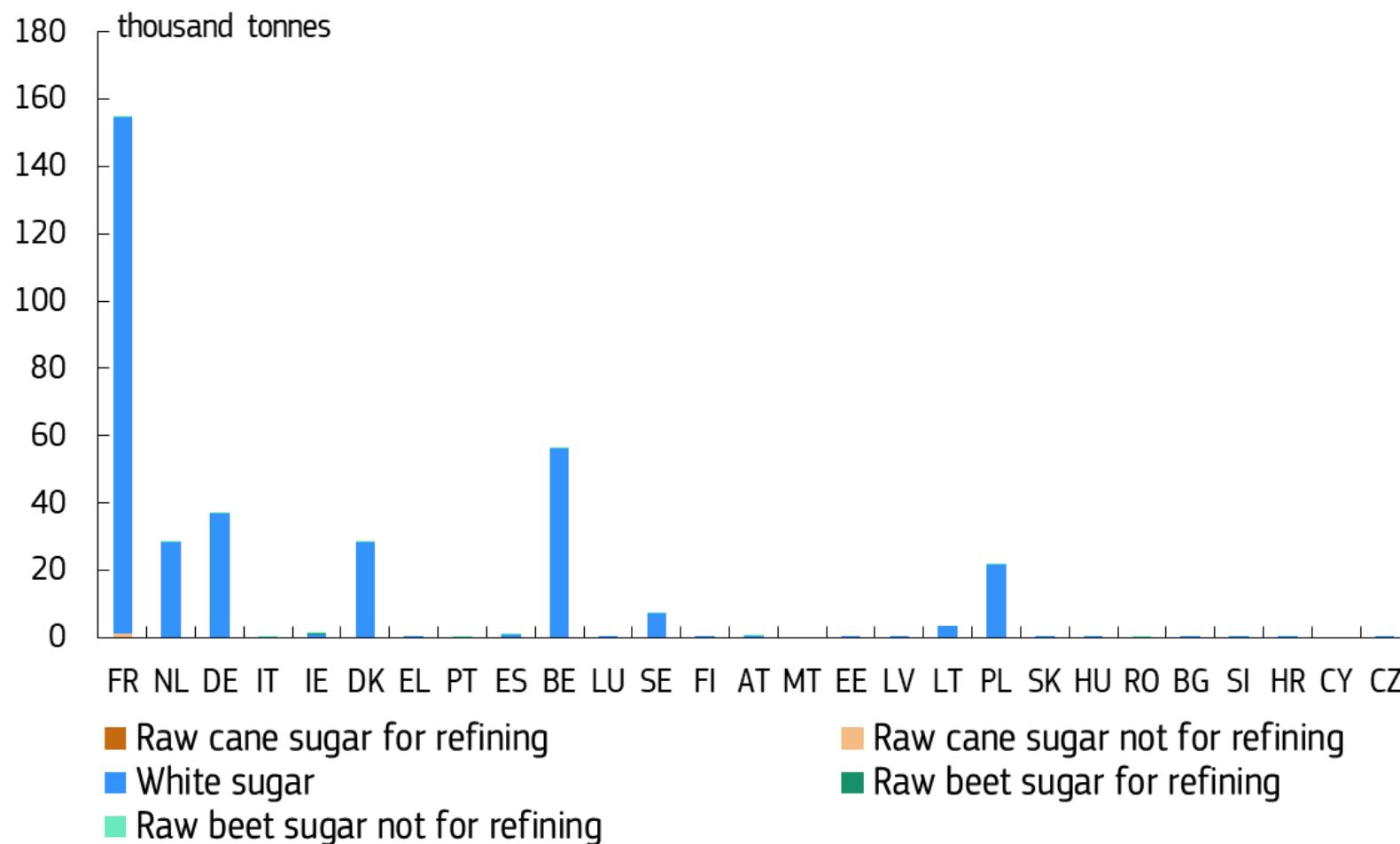
EU Total exports



Source: EUROSTAT- DG TAXUD



EU Total exports (2020/2021 - 4 m. - 0.341 m t - EU 27 MS)



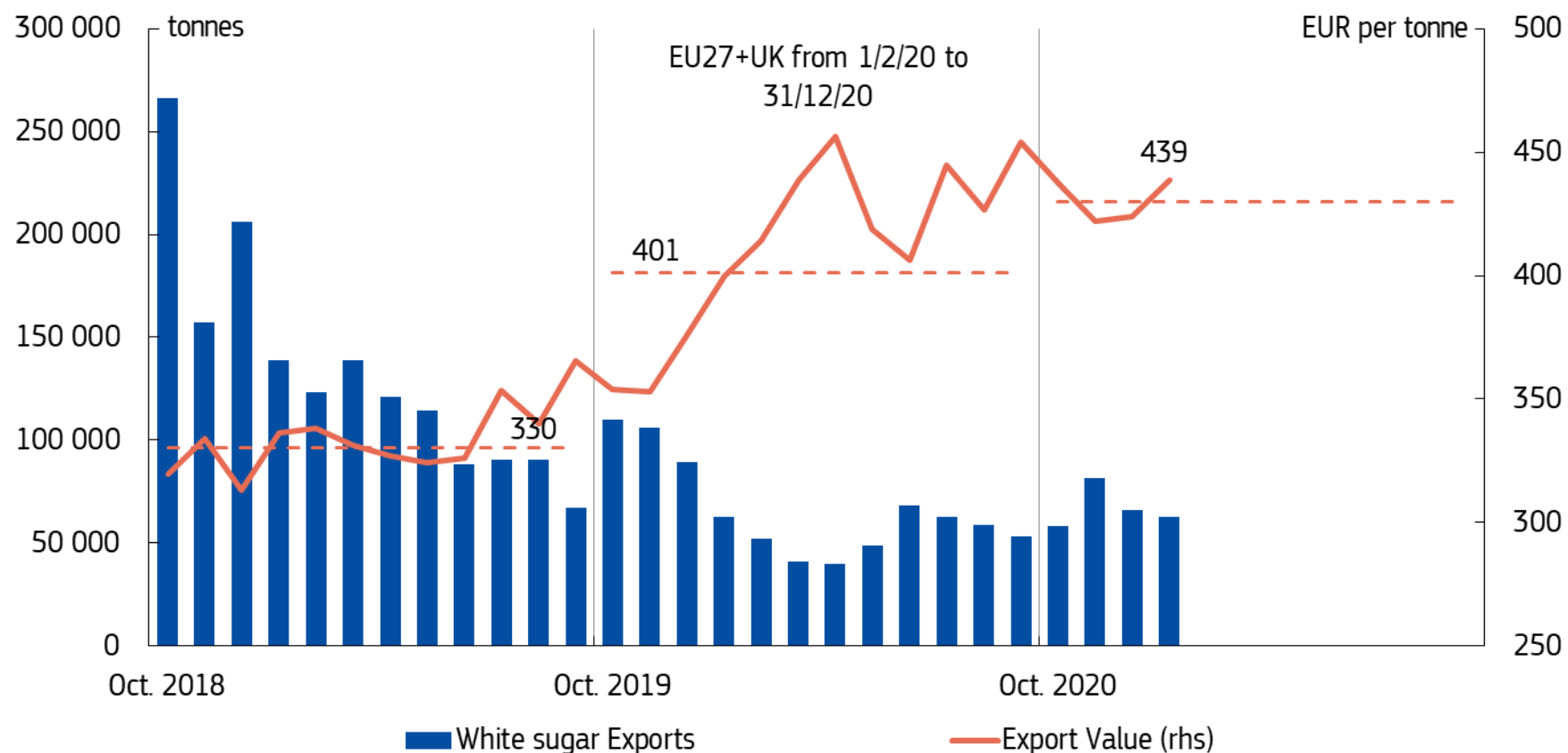
Source: EUROSTAT

Top five exporters of sugar (89% share)

	Volume ('000 tonnes)	Share (%)
France	154	45
Belgium	56	16
Germany	37	11
Netherlands	29	8
Denmark	29	8
Total EU	341	

EU White sugar exports

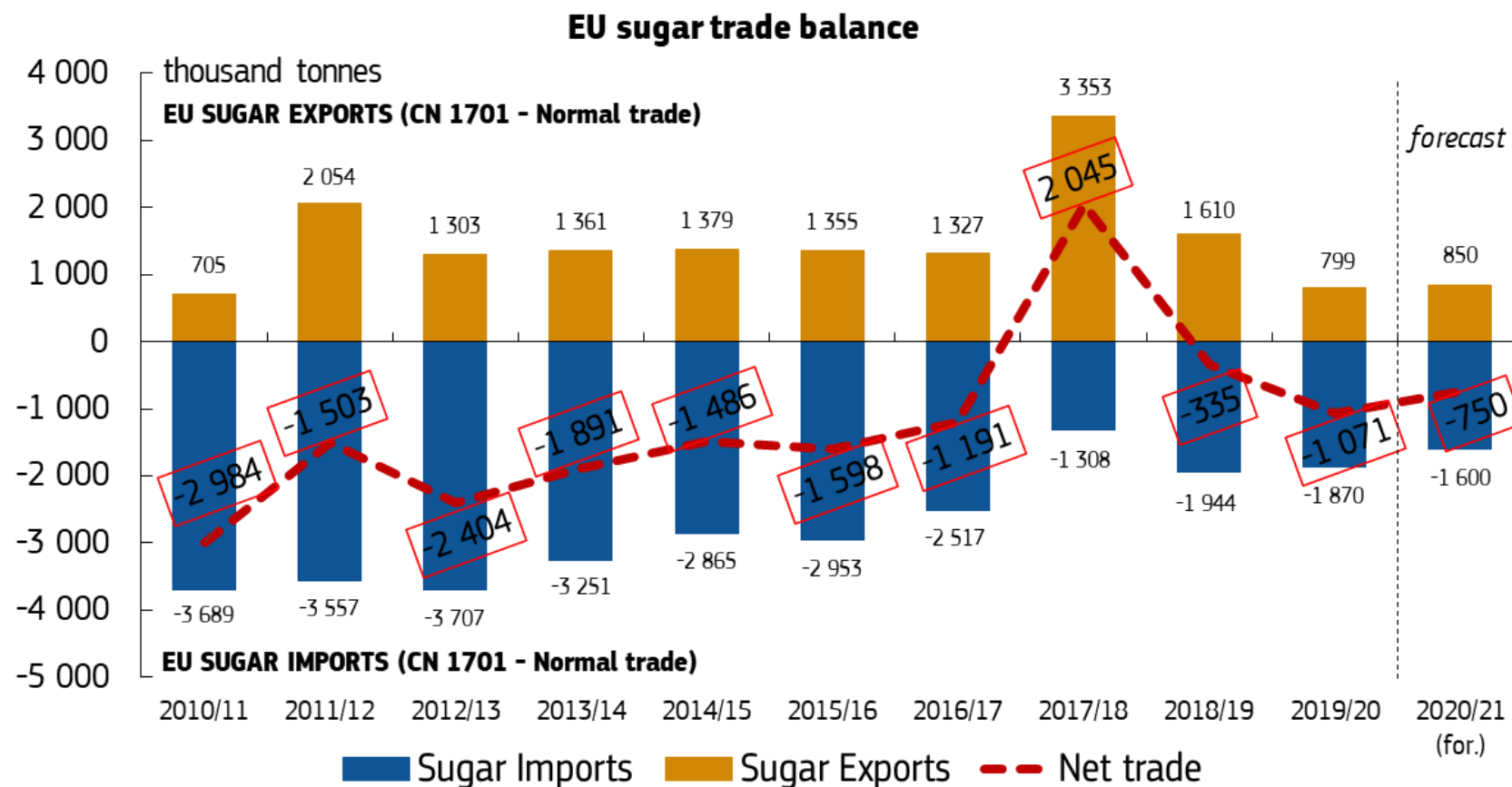
EU white sugar exports, volume and average FOB value



Source: EUROSTAT.

EU Sugar Trade

EU Sugar trade (EU27+UK from 1/2/2020 to 30/12/2020)



Source: EUROSTAT. Note: EU27 for marketing year 2020/21.

- 2019/20 trade deficit more than 3 times higher than the previous marketing year:

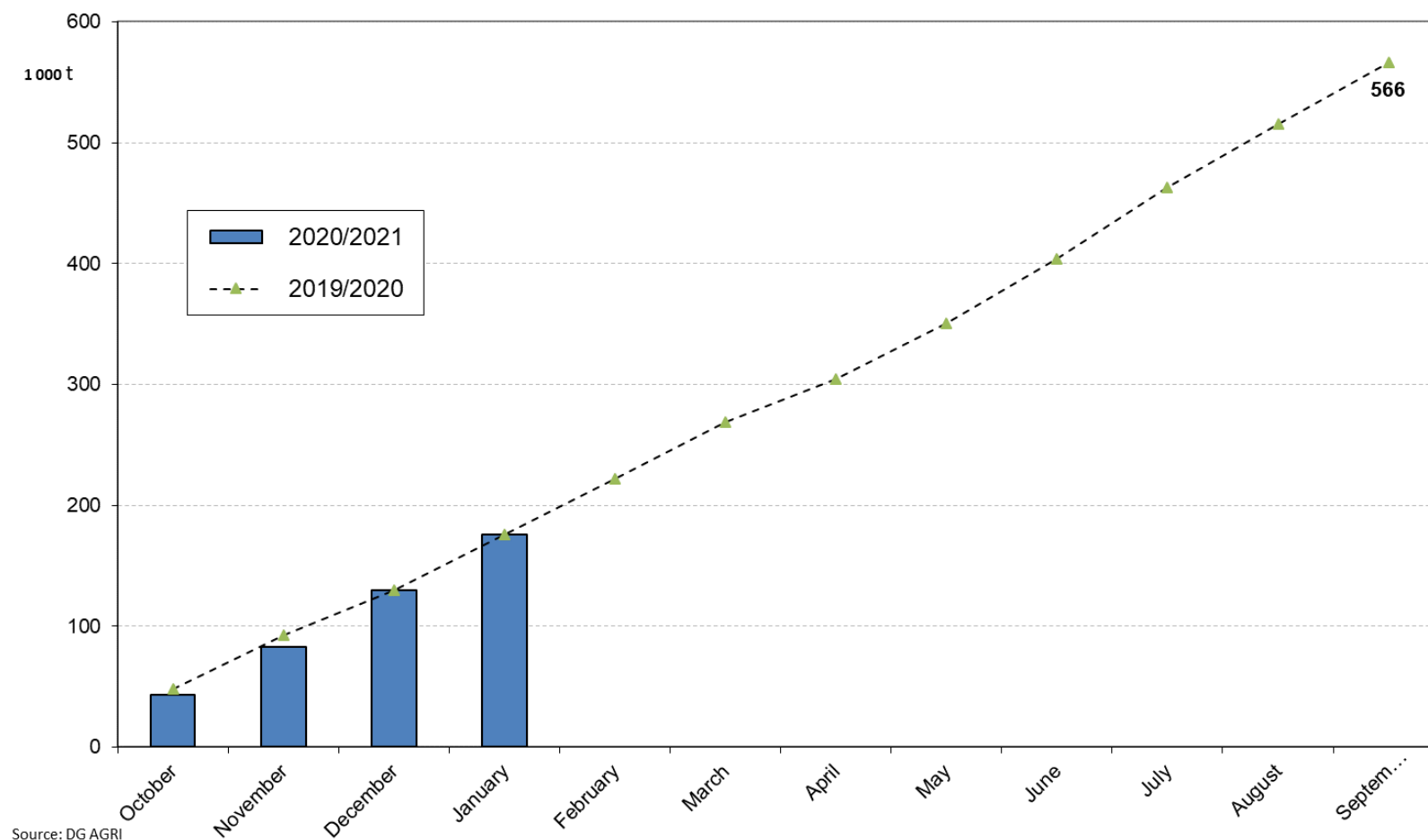
1.071 m t compared to 0.335 m t

- 2020/21 trade deficit forecast for EU27 at 0.750 m t

EU Isoglucose

EU Isoglucose production

ISOGLUCOSE - EU monthly cumulated production for 2020/2021

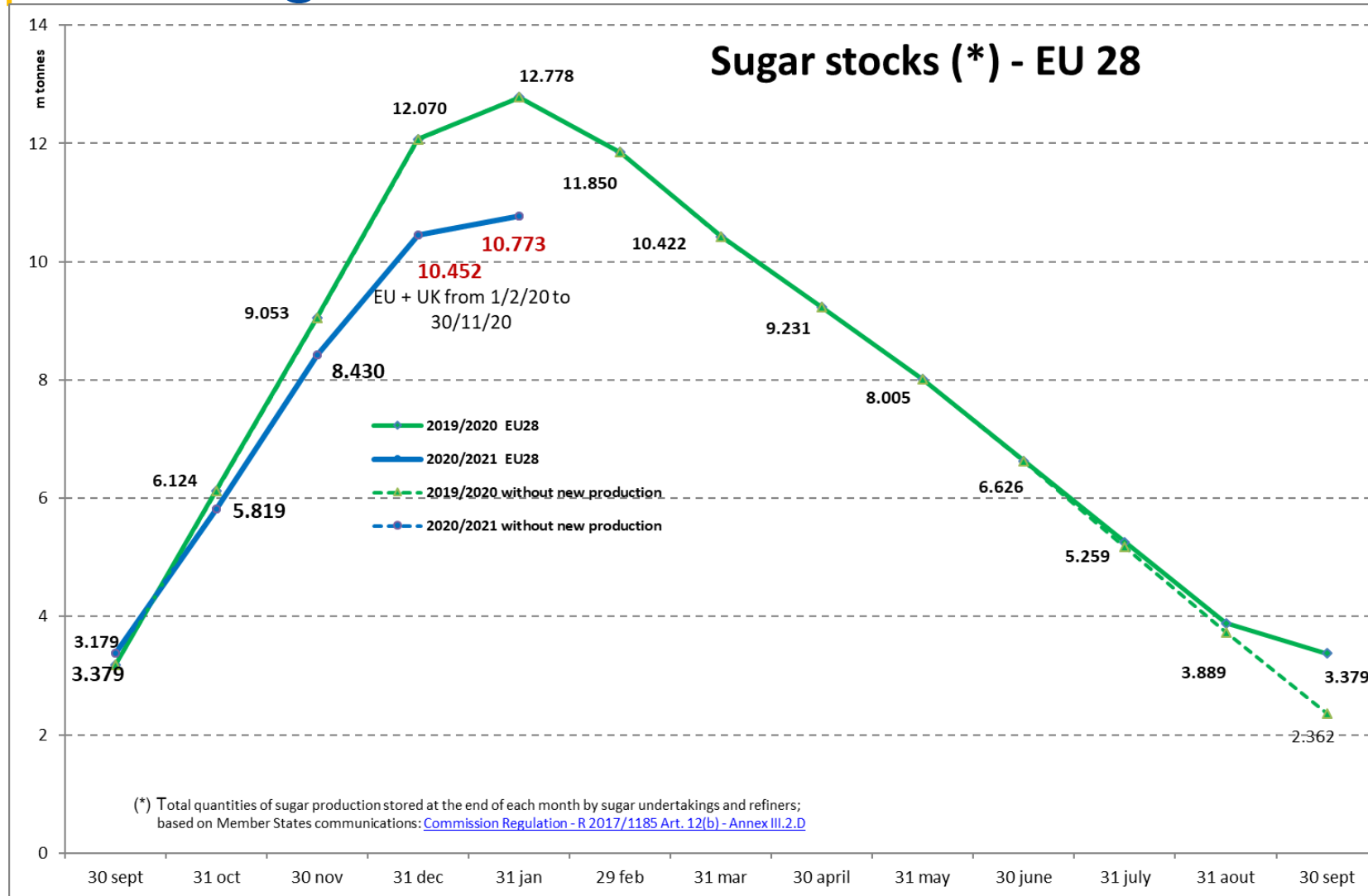


Source: DG AGRI

- Isoglucose production in line with previous marketing year

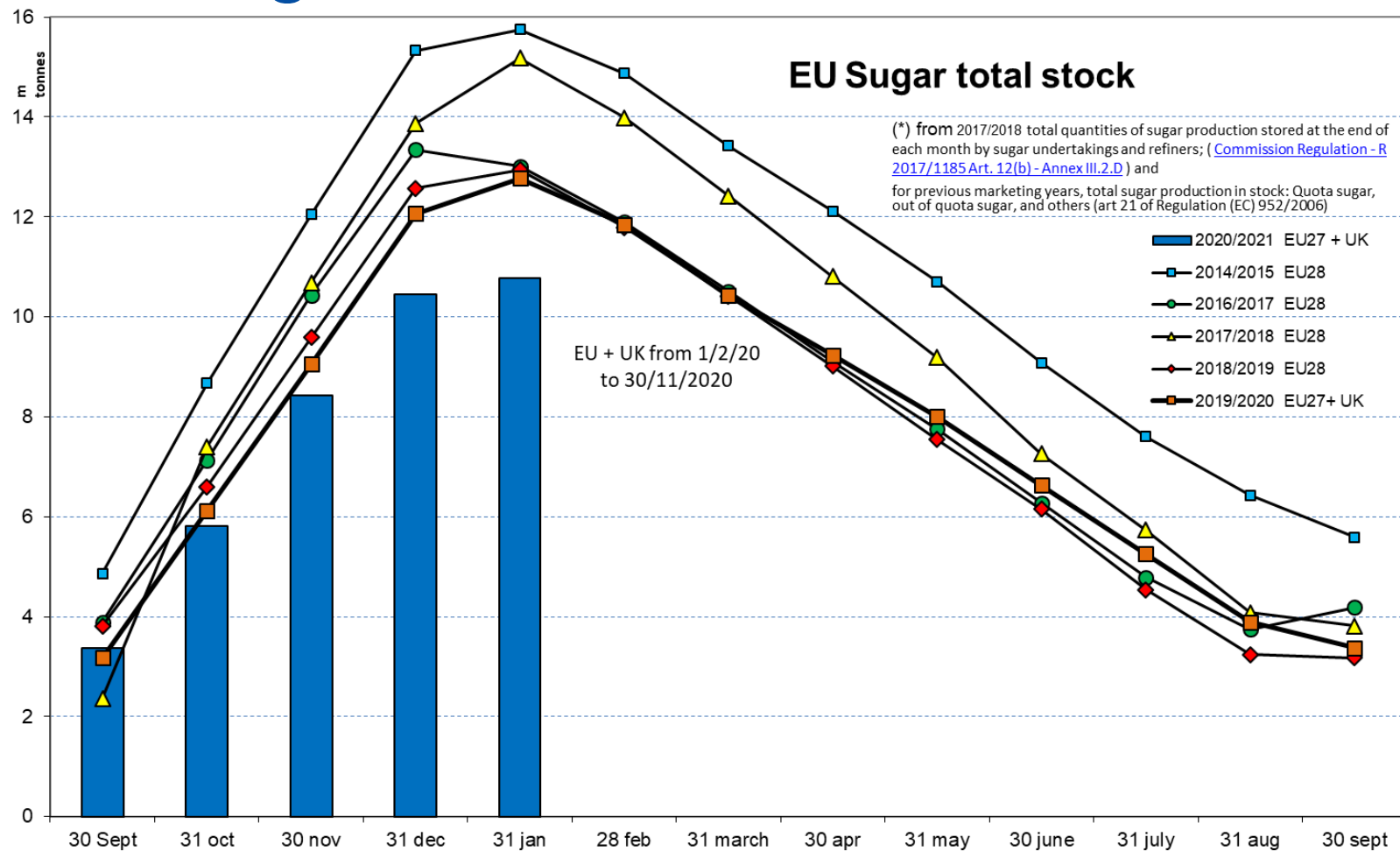
EU Sugar stocks

EU Sugar stocks



- By end of September total sugar stocks were 200 000 t above last year.
- By end of October 2020 sugar stocks are 300 000 tonnes lower than last MY
- Stocks in December 2020 and January 2021 correspond to EU27

EU Sugar stocks



Thank you

Disclaimer:

“The United Kingdom is no longer a Member State of the European Union, however where it is deemed relevant (e.g. for comparison purposes) an EU+UK aggregate may still be displayed.”