



# EU Sugar Balance

AGRI G 4

Common Organisation of Agricultural Markets

*25 February 2021 update*

# SUGAR AND ISOGLUCOSE BALANCE SHEET

## February 2021

- 2017/2018 Final
- 2018/2019 Final
- 2019/2020 Final
- 2020/2021 Forecast

# 2019/2020 - Sugar Production – Dec. 2020

Final SUGAR production 2019/20					Final SUGAR production 2019/20				
<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b) = (c) / (a)	Production of the campaign (c)	% increase compared to 2018/2019	<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b) = (c) / (a)	Production of the campaign (c)	% increase compared to 2018/2019
BE	58.6	13.5	792 375	-4%	HU	11.4	7.6	86 401	-22%
BG					NL	80.8	13.5	1 093 722	
CZ	57.5	9.1	522 473	-9%	AT	27.5	11.0	301 738	-8%
DK	29.3	12.4	361 969	3%	PL	240.8	8.6	2 065 979	-6%
DE	382.9	11.3	4 329 568	3%	PT (Continent)				
EL	1.6				PT (Açores)				
ES	32.3	12.6	407 408	3%	RO	22.8	6.1	138 167	28%
FR (Met.)	393.4	12.6	4 969 259	-2%	SK	23.5	6.8	159 597	-5%
FR (Dom.)			217 624		FI	10.6	7.0	74 166	41%
HR	14.0	7.7	107 037	-10%	SE	27.3	10.6	288 014	3%
IT	30.0	6.1	182 167	-16%	<b>TOTAL EU</b>	1 459	11.1	<b>16 264 584</b>	-1.3%
LT	14.8	11.3	166 922	13%	UK	89.0	13.4	1 191 444	
					<b>TOTAL EU + UK</b>	1 548	11.3	<b>17 456 028</b>	-1.0%

Final sugar and isoglucose production communicated by MS,  
Commission Regulation - R 2017/1185 Art. 12(b) - Annex III.2.B  
Commission Regulation - R 2017/1185 Art. 12(b) - Annex III.2.C(a)

# SUGAR BALANCE SHEET

## 2018/19 - 2019/20 – February 2020

Final		Final										
2018/19 (oct-sept)		2019/20 (oct-sept)		x 1000 tonnes wse								
EU 28		EU + UK										
Sugar	Isoglucose	Sugar	Isoglucose									
2 423	27	1 829	18	<b>1 Beginning stocks</b>								
17 631	561	17 456	566	<b>2 Production</b>								
2 489	5	2 434	1	<b>3 Imports</b>								
<table border="0"> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">1 910</td> <td></td> </tr> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">579</td> <td></td> </tr> </table>	1 910		579			<table border="0"> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">1 848</td> <td></td> </tr> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">586</td> <td></td> </tr> </table>	1 848		586			3 1 - as such 3 2 - in processed products
1 910												
579												
1 848												
586												
22 542	592	21 719	585	<b>4 TOTAL AVAILABLE</b>								
				<i>4 = 1 + 2 + 3</i>								

- 2019/20 Final sugar production similar to provisional sugar production (+ 0.05 mt)
- Compared to 2018/19 sugar production decreased by 0.2 mt (-1%)

# SUGAR BALANCE SHEET

## 2018/19 - 2019/20 – February 2020

2019/20  
compared to 2018/19:

Final 2018/19 (oct-sept) EU 28		Final 2019/20 (oct-sept) EU + UK		x 1000 tonnes wse
Sugar	Isoglucose	Sugar	Isoglucose	
17 379	529	16 926	527	<b>5 Consumption/disappearance</b>
800		800		of which industrial use
750		775		of which bioethanol
15 829		15 351		other
3 334	45	2 432	45	<b>6 Exports</b>
1 610		795		6 1 - as such
1 724		1 637		6 2 in processed products
1 829	18	2 360	13	<b>7 Ending stocks</b>
22 542	592	21 719	585	<b>8 TOTAL OUTLETS</b>
				$8 = 5 + 6 + 7 = 4$

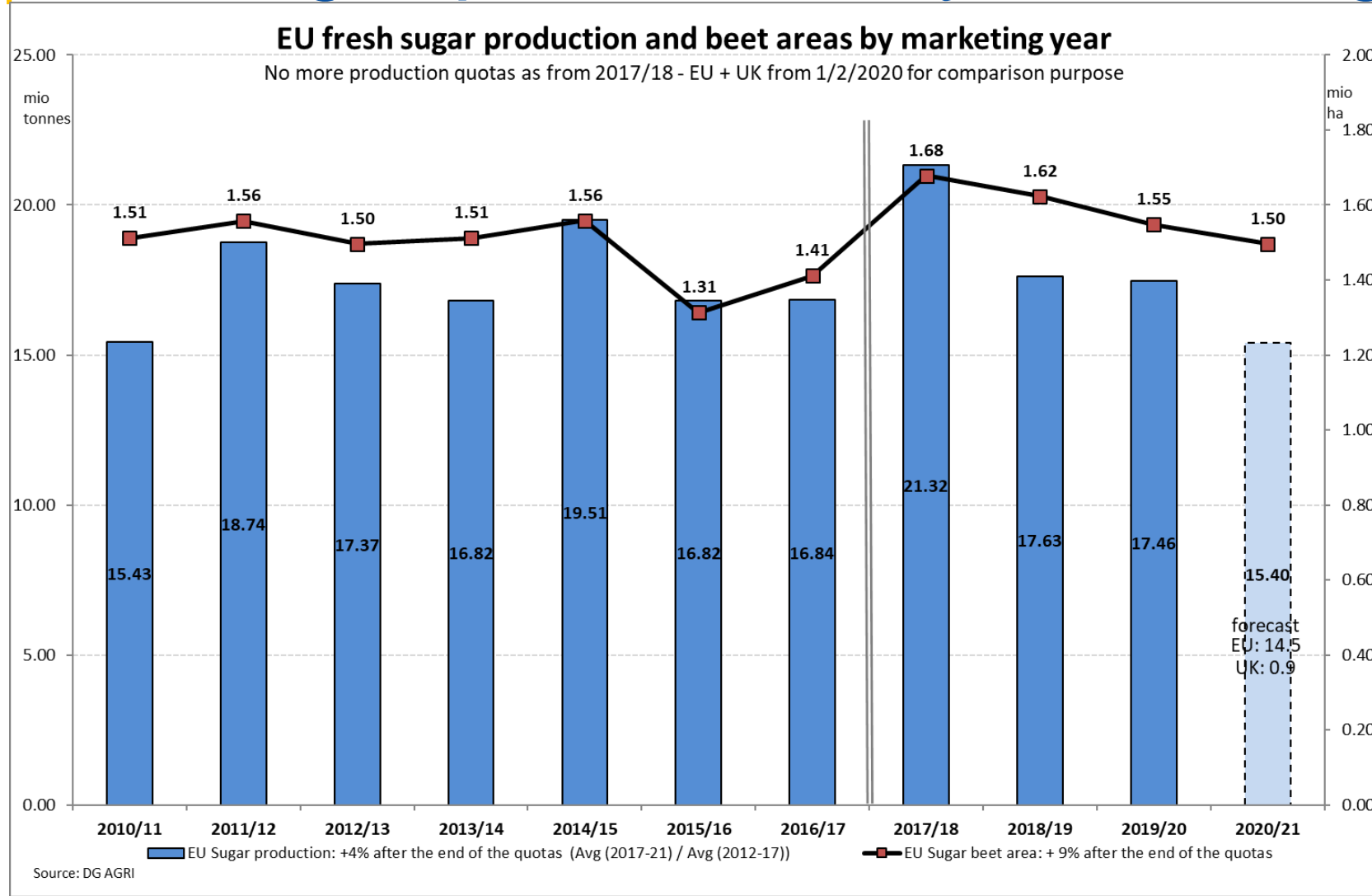
- Consumption reduced by 0.5 mt (-3%)
- Exports reduced by 0.8mt (-50%)
- Reduced sugar exports in processed products (-5%)
- Final stocks increased by 0.5 mt

# SUGAR AND ISOGLUCOSE BALANCE SHEET

## February 2021

- 2017/2018 Final
- 2018/2019 Final
- 2019/2020 Final
- 2020/2021 Forecast

# EU Sugar production by Marketing Year Feb. 20



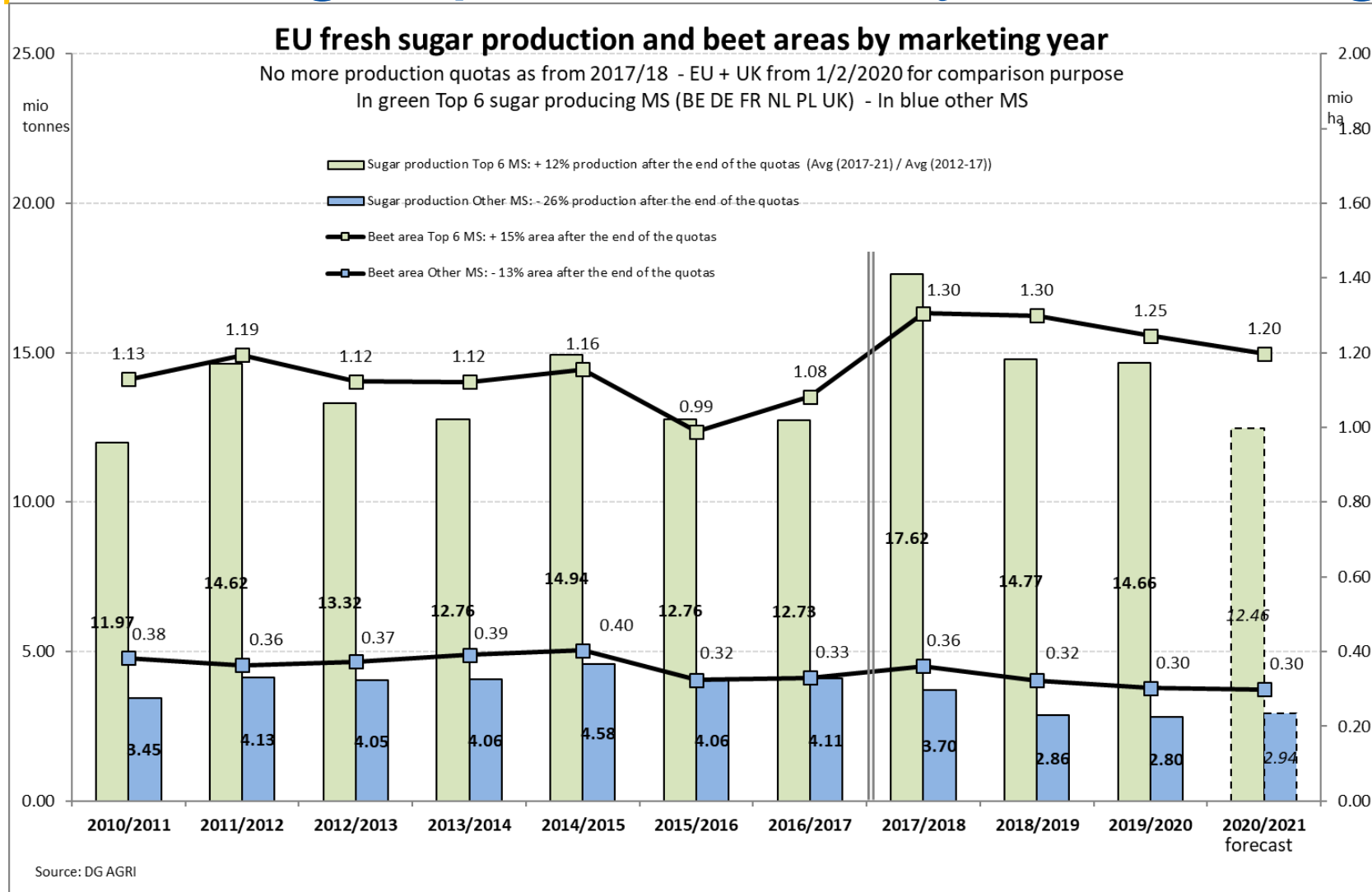
- **2019/20** (final) compared to 2018/19

Area - 4.6%  
 Production - 1.0%

- **2020/21** (forecast) compared to 2019/20

Area - 3.5%  
 (EU - 4.0%)  
 Production - 12%  
 (EU - 11%)

# EU Sugar production by Marketing Year Feb. 20



- **2019/20** (final)  
 compared to 2018/19

Area - 4.6%  
 Production - 1.0%

- **2020/21** (forecast)  
 compared to 2019/20

Area - 3.5%  
 (EU - 4.0%)  
 Production - 12%  
 (EU - 11%)



# 2020/2021 - Sugar Production – 24 Feb. 2020

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

(based on long term average or MS communications)

<b>SUGAR production forecast 2020/21</b>				
<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	
BG				
CZ	57.1	9.7	555 000	6%
DK	33.3	11.8	392 738	9%
DE	349.8	11.7	4 105 342	-5%
EL			0	
ES	28.0	13.6	380 000	-7%
FR (Met.)	362.5	9.4	3 400 000	-32%
FR (Dom.)		0.0	200 000	-8%
HR	12.0	10.5	126 000	18%
IT	28.2	7.9	223 000	22%
LT	14.7	9.4	137 518	

<b>SUGAR production forecast 2020/21</b>				
<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
HU	11.7	8.9	104 400	
NL	83.5	13.1	1 092 000	0%
AT	26.3	12.2	320 000	6%
PL	251.9	7.9	2 000 000	-3%
PT (Continent)		0.0	0	
PT (Açores)		0.0	0	
RO	23.1	6.3	144 754	
SK	22.3	7.9	177 146	11%
FI	11.5	6.0	69 200	
SE	29.8	10.5	311 161	8%
<b>TOTAL EU</b>	1 403	10.3	<b>14 499 799</b>	-11%
UK	92.0	11.6	900 000	-24%
<b>TOTAL</b>	1 495	10.3	<b>15 399 799</b>	-12%

# SUGAR BALANCE SHEET

Forecast 2020/21 – February 2021

- Forecast 2020/21 is for EU only:
  - 27 MS and for 12 months from Oct. 20 to Sep. 21  
(UK is also considered as extra EU between Oct. 20 and Dec. 20)
  - rounded figures to estimate  
UK sugar stocks by end of September 20 (0.2 million tonnes) and  
UK sugar consumption in 2019/20 (1.8 million tonnes)

# SUGAR BALANCE SHEET

Forecast 2020/21 – February 2021

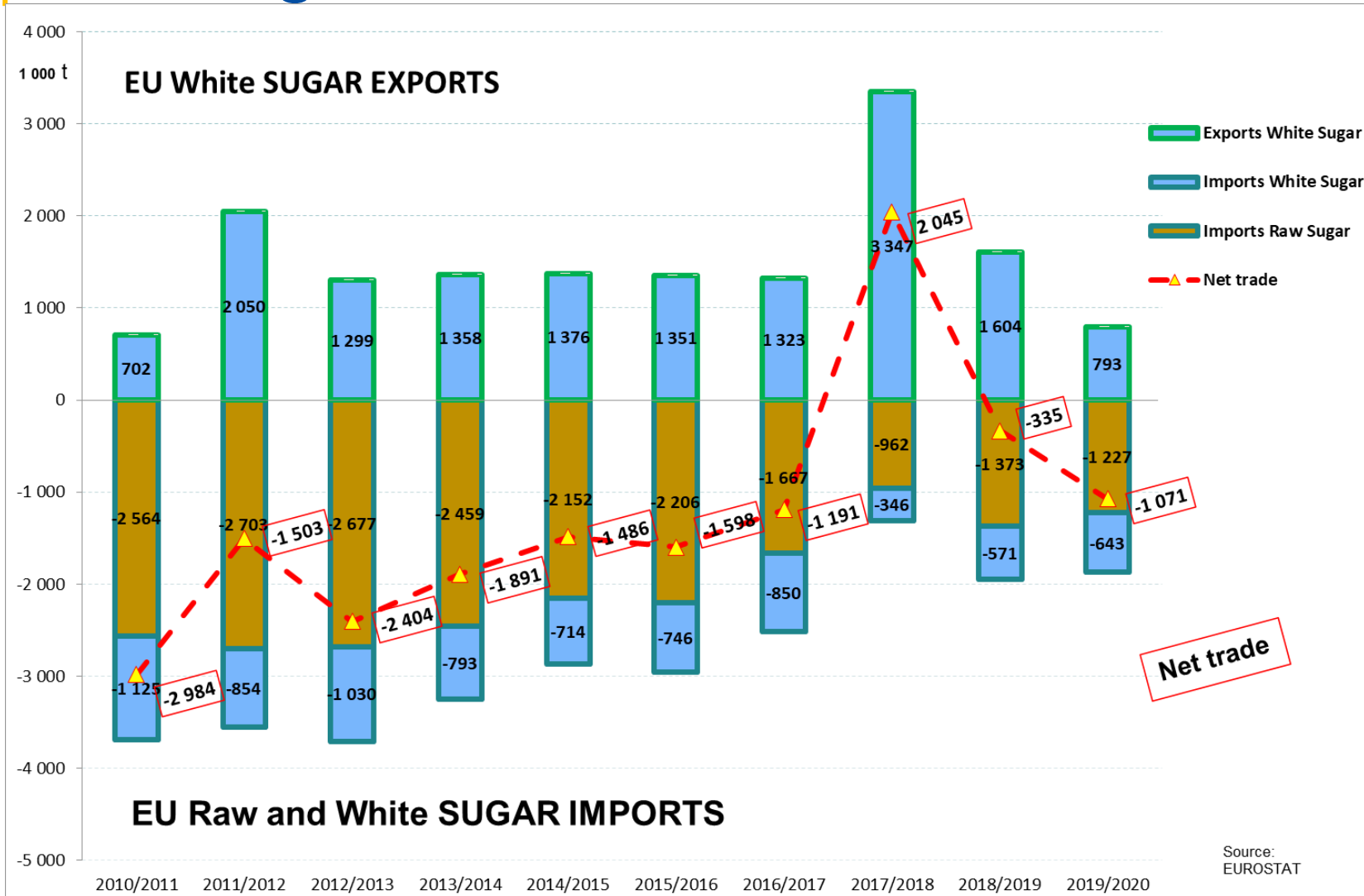
- Impact of Brexit:
  - Duty and quota free trade for agricultural products
  - ‘Rules of Origin’: products exported from the UK that benefit from duty free access to the EU must be produced in the UK
    - White sugar refined from imported raw sugar does not comply to the rules
    - Application of the ‘Rules of Origins’ are likely to impact the flow of traded sugar from UK to EU more than in the other direction.

# SUGAR BALANCE SHEET

Forecast 2020/21 – February 2021

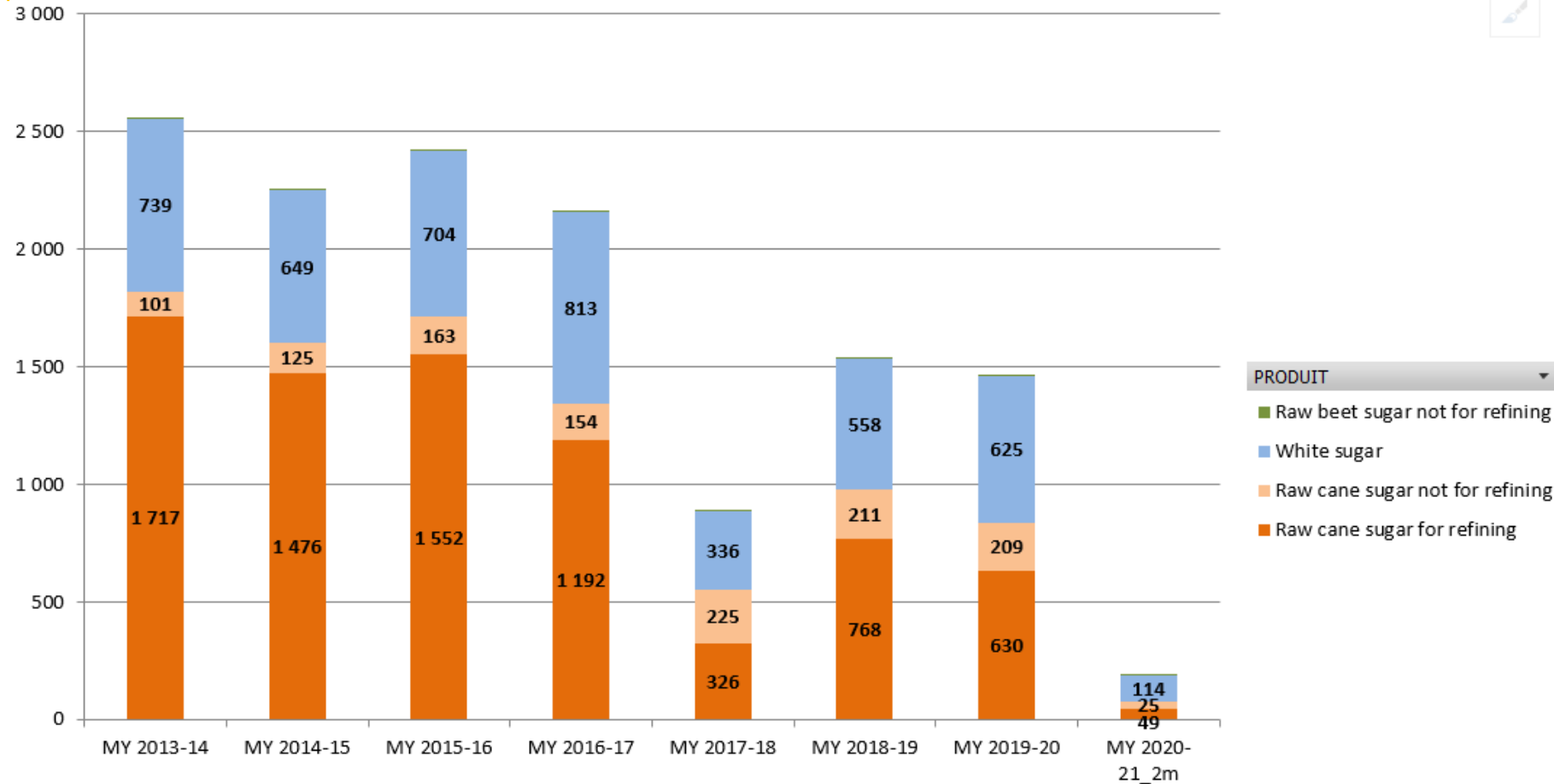
- Forecast 2020/21 for EU based on:
  - Current EU sugar production forecast around 14.65 million tonnes (Jan. 21)
  - EU sugar consumption/disappearance very similar to previous MY
  - EU sugar trade with third countries other than UK similar to previous MY
  - However, EU sugar trade with the UK will be impacted by
    - Non-originating sugar that will no more be exported,
    - EU and UK sugar production forecast from sugar beets very low in 2020/21,
    - Possible impact from additional administrative/logistic burden ...

# EU Sugar trade (EU + UK from 1/2/2020 to 30/9/20)



- By end of September 2020 trade deficit more than 3 times higher than last marketing year:
- More than 1.07 million tonnes compared to -0.335 m t in 18/19

# Sugar imports (EU without UK)

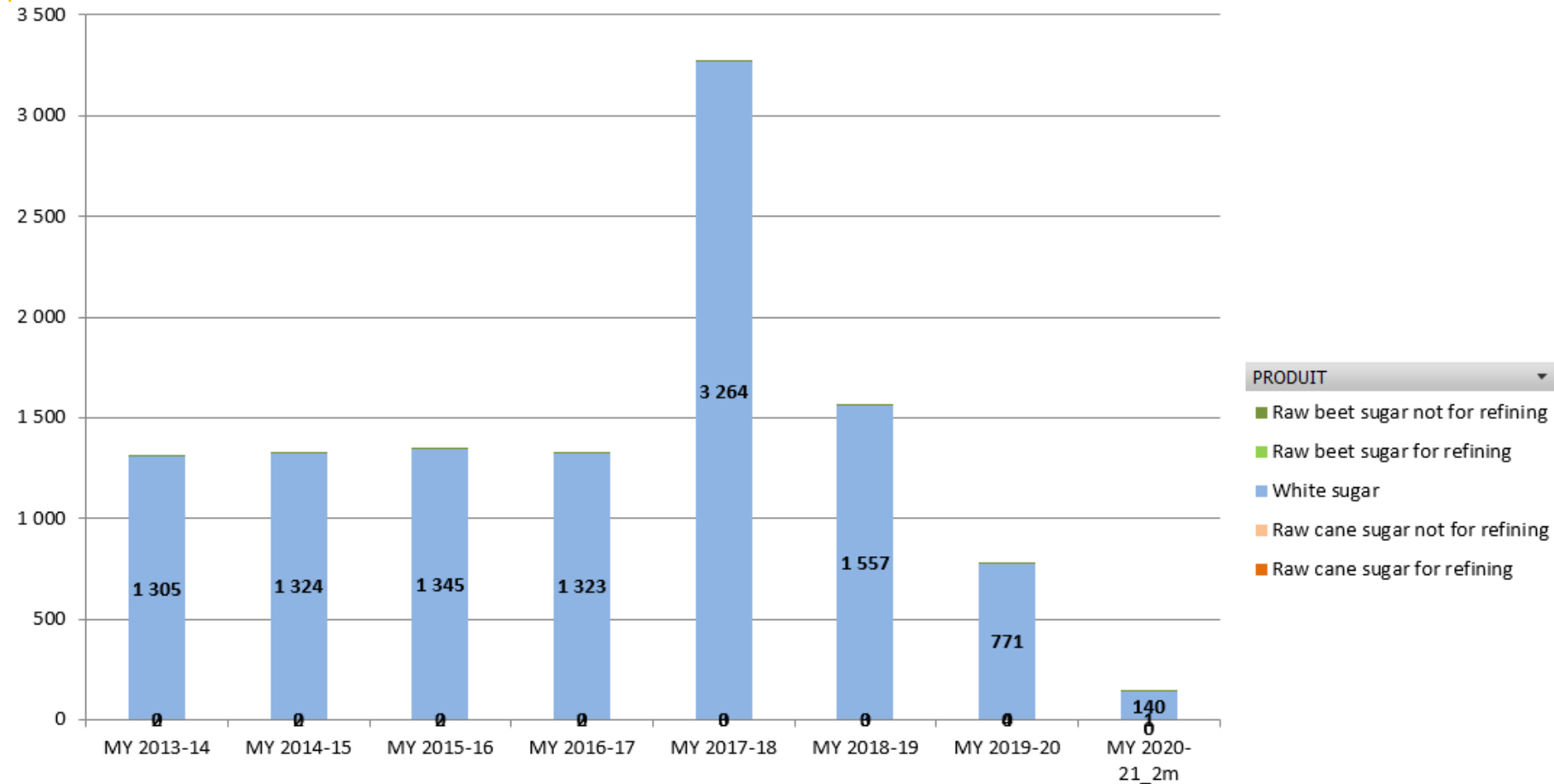


- EU without UK total sugar imports from third countries in 1 000 tonnes split by

- Raw sugar for refining
- Raw sugar not for refining
- White sugar

Source: EUROSTAT

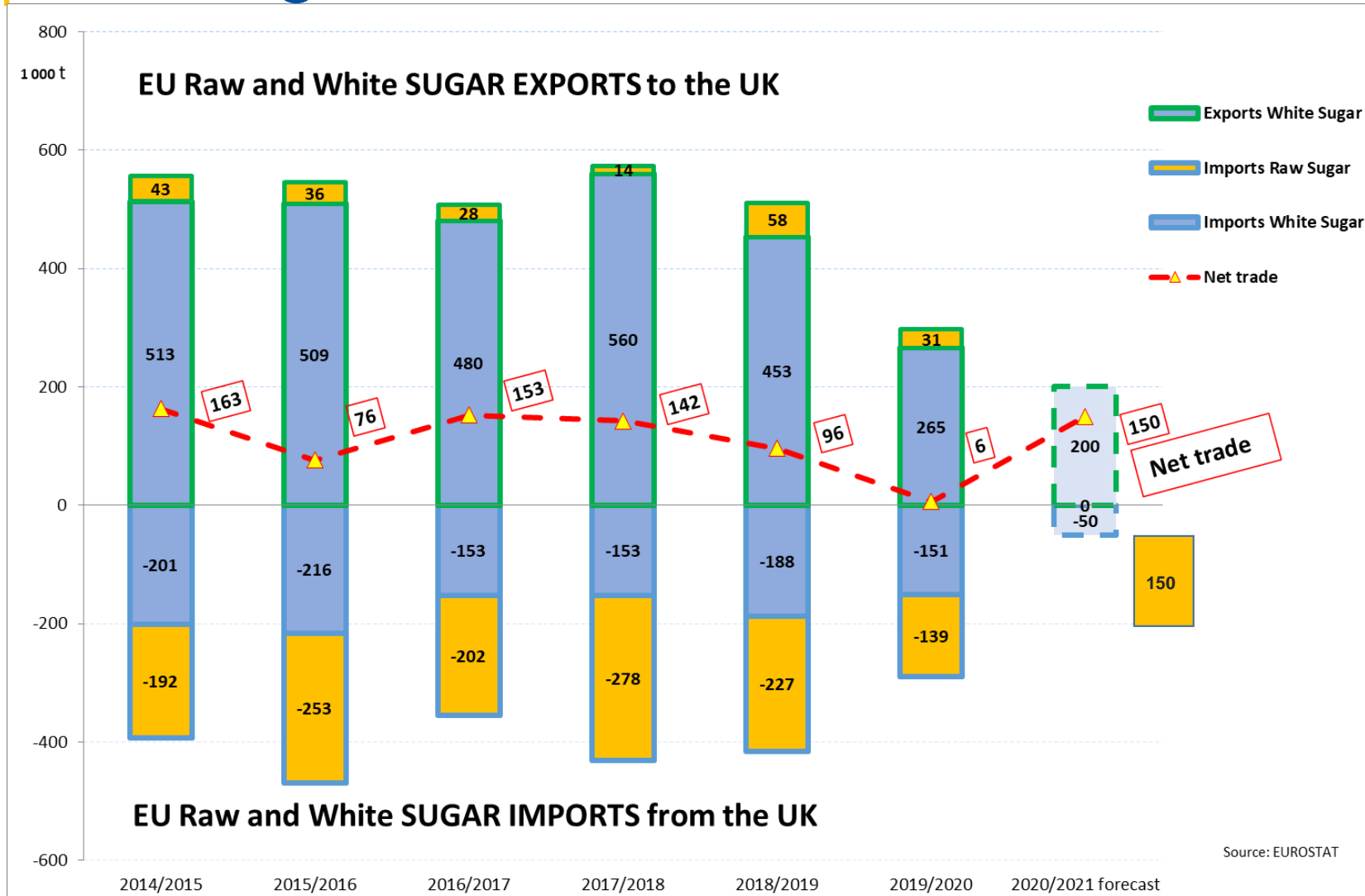
# Sugar exports (EU without UK)



- EU without UK total sugar exports to third countries in 1 000 tonnes

Source:  
EUROSTAT

# EU Sugar trade with the UK



- Forecast 2020/21:
- No more EU/UK trade of raw sugar
- EU sugar exports to the UK estimated to 0.2 million tonnes
- EU sugar imports from the UK estimated to 0.05 million tonnes
- EU raw sugar imports from other Third Countries estimated to 0.15 million tonnes



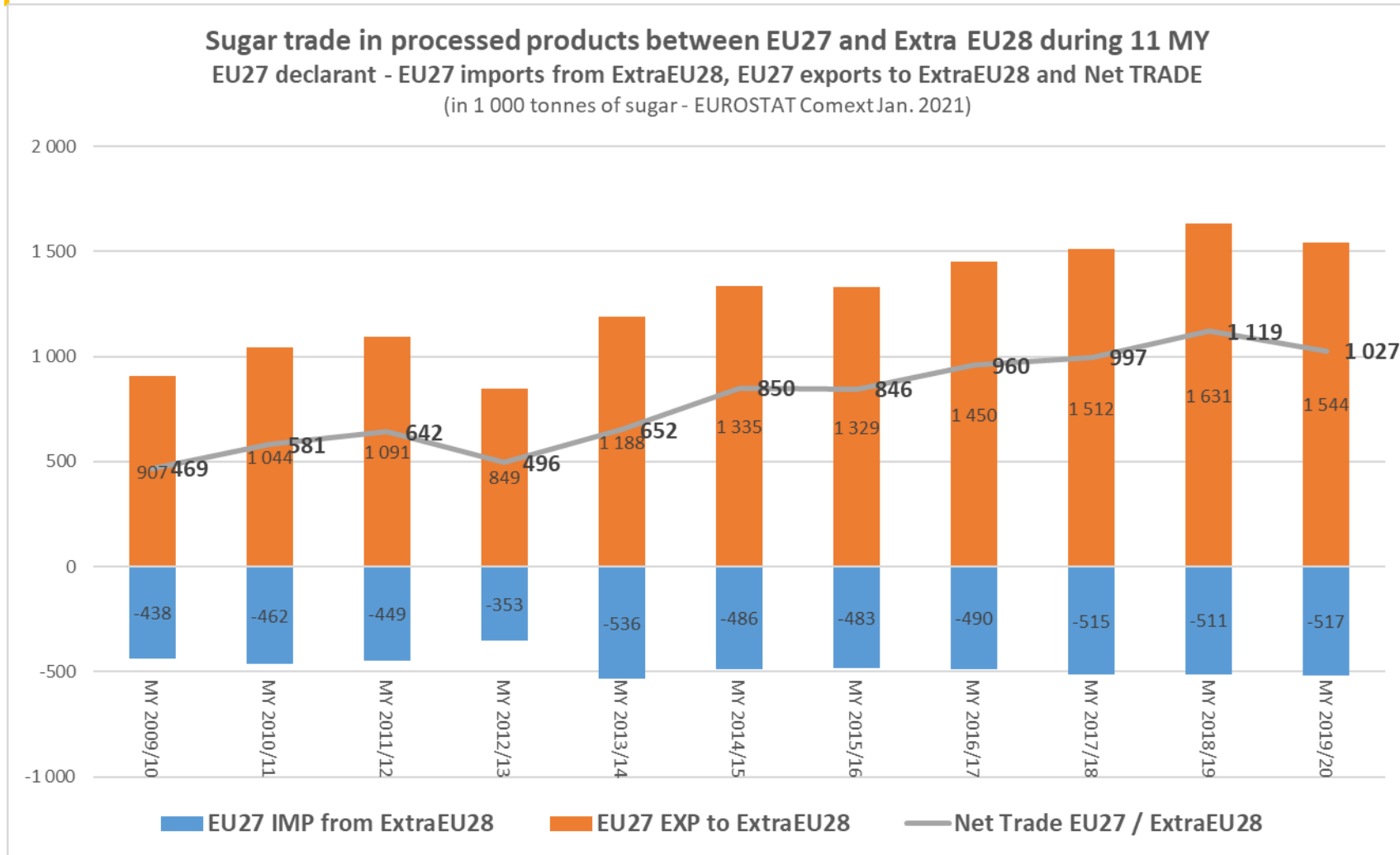
# SUGAR BALANCE SHEET

Forecast 2020/21 – February 2021

- Trade of sugar as such with the UK:
  - EU sugar imports from the UK estimated to 0.05 million tonnes of white sugar mainly to Ireland (0.15 – 0.20 million tonnes of raw sugar usually imported from the UK will be replaced by direct EU imports from third countries)
  - EU sugar exports to the UK estimated to 0.20 million tonnes of white sugar (compared to 0.27 million tonnes in 2019/20 and 0.5 million tonnes before)
- Trade of sugar in processed products with the UK could also be slightly reduced

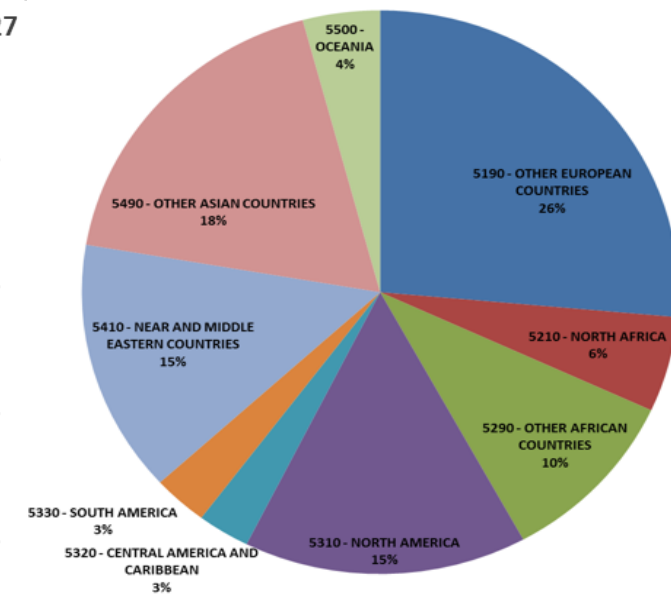
# Sugar in processed products

## Trade between the EU 27 MS and Third countries (UK excluded)



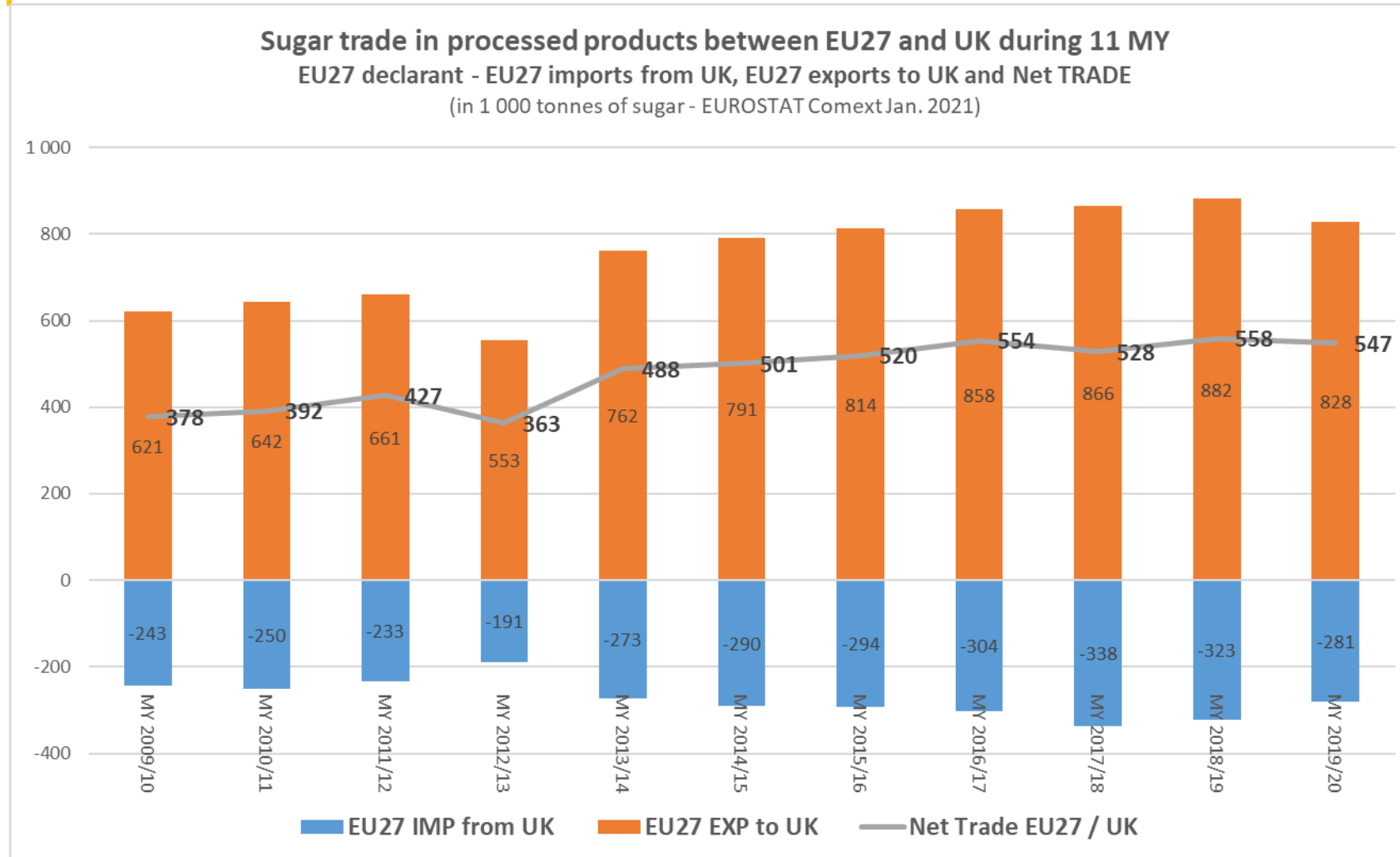
## EU exports of sugar in processed products

### Main destinations during MY 2017/18



# Sugar in processed products

## Trade between EU 27 MS and the UK



- Nearly 70% of EU exports to the UK are covered by 5 MS (DE BE NL IE FR)
- Nearly 50% of EU imports from the UK are going to Ireland

# SUGAR BALANCE SHEET

## Forecast 2020/21 – 25 February 2021

Forecast						
2020/21 (oct-sept)		x 1000 tonnes wse				
EU (27 MS from 1/10/20 to 30/9/21)						
Sugar	Isoglucose					
2 160	13	1 <b>Beginning stocks</b>				
14 500	570	2 <b>Production</b>				
2 300	5	3 <b>Imports</b>				
<table border="0"> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">1 600</td> <td></td> </tr> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">700</td> <td></td> </tr> </table>	1 600		700			3 1 - as such 3 2 - in processed products
1 600						
700						
18 960	588	4 <b>TOTAL AVAILABLE</b>				
		<i>4 = 1 + 2 + 3</i>				

- Rounded UK stocks deducted (- 0.2 million tonnes)
- EU 27 MS sugar production forecast (14.5 million tonnes)
- Imports as such  
EU 1.4 million tonnes +  
0.05 million tonnes from UK +  
0.15 million tonnes raws from  
third countries
- Imports in processed products  
EU 0.5 million tonnes +  
0.2 million tonnes from UK  
(-25% compared to long-term average)

# SUGAR BALANCE SHEET

## Forecast 2020/21 – 25 February 2021

Forecast		
2020/21 (oct-sept)		x 1000 tonnes wse
EU (27 MS from 1/10/20 to 30/9/21)		
Sugar	Isoglucose	
14 950	529	<b>5 Consumption/disappearance</b>
800		of which industrial use
600		of which bioethanol
13 550		other
3 000	45	<b>6 Exports</b>
900		6 1 - as such
2 100		6 2 in processed products
1 010	15	<b>7 Ending stocks</b>
18 960	588	<b>8 TOTAL OUTLETS</b>
		$8 = 5 + 6 + 7 = 4$

- EU 27 MS consumption stable  
(1.8 million tonnes for UK consumption deducted)
- Stable industrial use  
Reduced bioethanol production  
(EU production -0.1 million tonne and deduction of -0.075 million tonnes for UK)
- Exports as such  
EU 0.7 million tonnes +  
0.2 million tonnes to UK  
(compared to 0.27 million tonnes in 2019/20 and 0.5 million tonnes before)
- Exports in processed products  
EU 1.5 million tonnes +  
0.6 million tonnes to UK  
(-25% compared to long-term average)

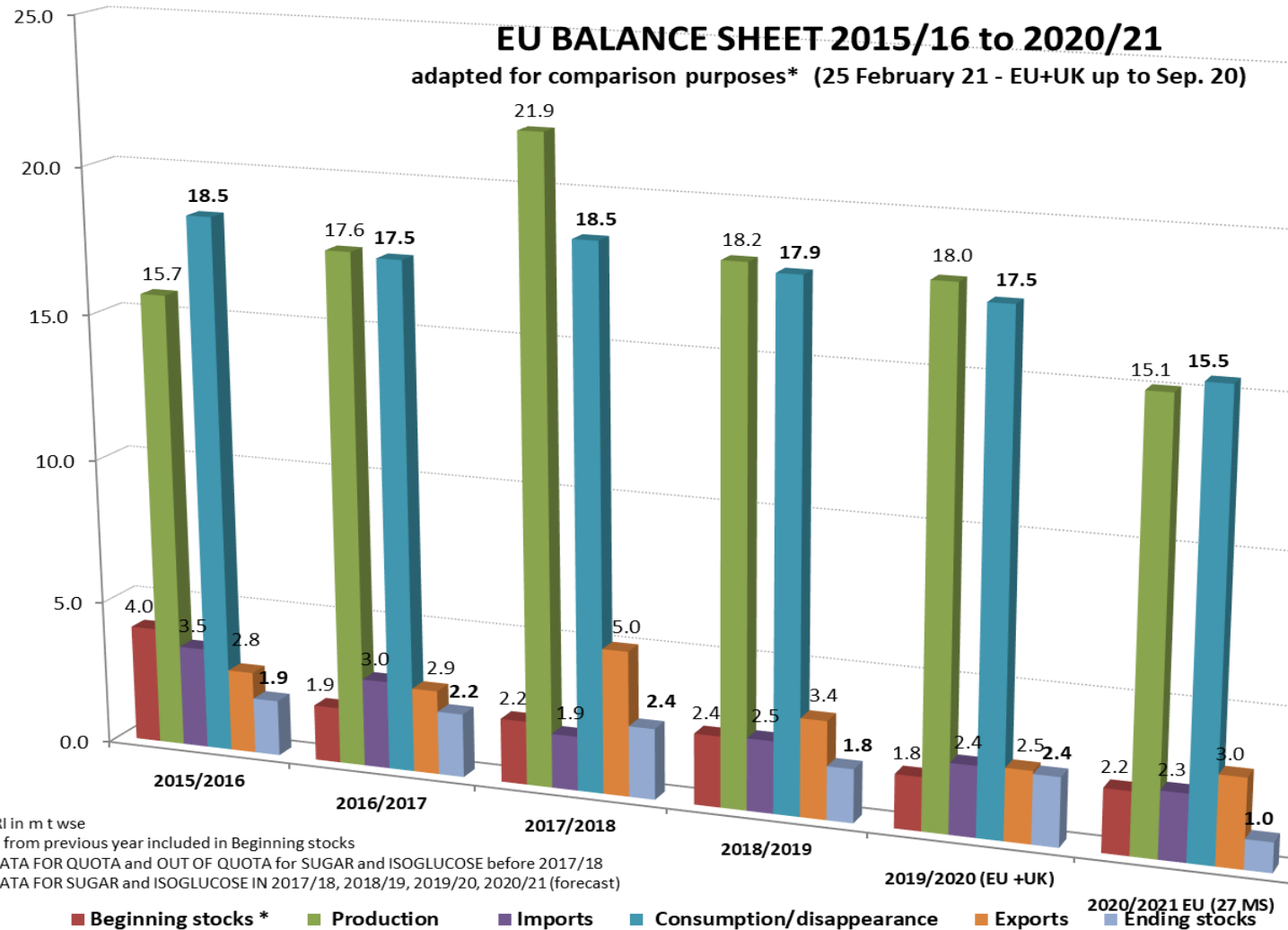
# SUGAR AND ISOGLUCOSE BALANCE SHEET

## 2017/18 – 2020/21 25 February 2021

Final 2017/18 (oct-sept) EU 28		Final 2018/19 (oct-sept) EU 28		Final 2019/20 (oct-sept) EU + UK		Forecast 2020/21 (oct-sept) EU (27 MS from 1/10/20 to 30/9/21)		x 1000 tonnes wse
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	14 500	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	18 960	588	4 TOTAL AVAILABLE <i>4 = 1 + 2 + 3</i>
17 977   850   900   16 227	570	17 379   800   750   15 829	529	16 926   800   775   15 351	527	14 950   800   600   13 550	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	3 000   900   2 100	45	6 Exports 6 1 - as such 6 2 - in processed products
2 423 	27	1 829 	18	2 360 	13	1 010 	15	7 Ending stocks
25 360	641	22 542	592	21 719	585	18 960	588	8 TOTAL OUTLETS <i>8 = 5 + 6 + 7 = 4</i>

# SUGAR BALANCE SHEET

## 2015/16 to 2020/21 – February 2021



# 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.”