



EU Sugar Balance

AGRI G 4

Common Organisation of Agricultural Markets

10 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%	TOTAL EU	1 459	11.1	16 264 584	-1.3%
LT	14.8	11.3	166 922	13%	UK	89.0	13.4	1 191 444	
					TOTAL EU + UK	1 548	11.3	17 456 028	-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	1 Beginning stocks								
17 631	561	17 456	566	2 Production								
2 489	5	2 434	1	3 Imports								
<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	4 TOTAL AVAILABLE								
				<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		Final		
2018/19 (oct-sept)		2019/20 (oct-sept)		x 1000 tonnes wse
EU 28		EU + UK		
Sugar	Isoglucose	Sugar	Isoglucose	
17 379	529	16 926	527	5 Consumption/disappearance
800		800		of which industrial use
750		775		of which bioethanol
15 829		15 351		other
3 334	45	2 432	45	6 Exports
1 610		795		6 1 - as such
1 724		1 637		6 2 in processed products
1 829	18	2 360	13	7 Ending stocks
22 542	592	21 719	585	8 TOTAL OUTLETS
				$8 = 5 + 6 + 7 = 4$

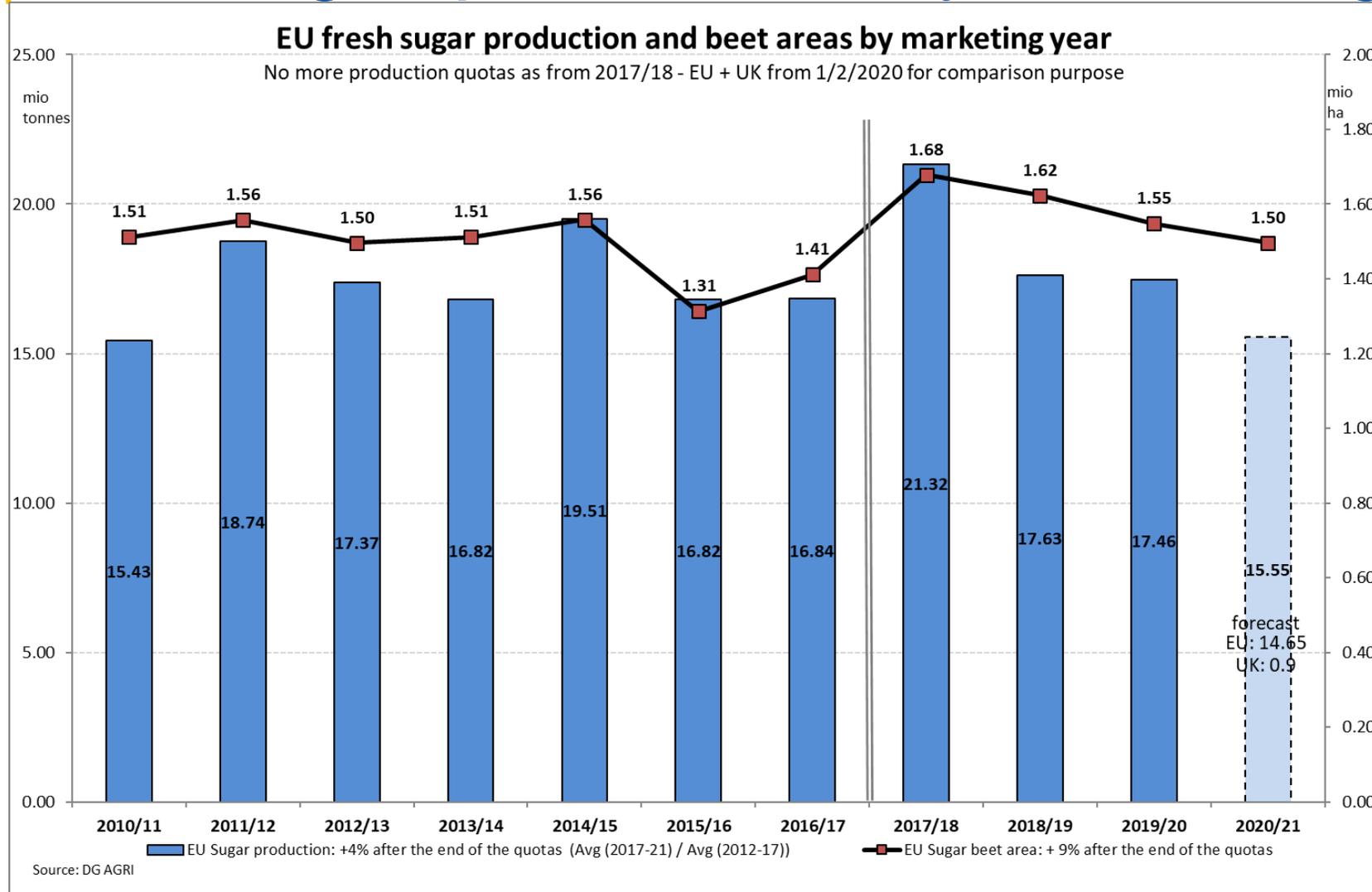
- Consumption reduced by 0.5 mt (-3%)
- Exports reduced by 0.8mt (-50%)
- Reduced sugar exports in processed products (-5%)
- Final stocks increased by 0.5 mt

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 Jan. 20



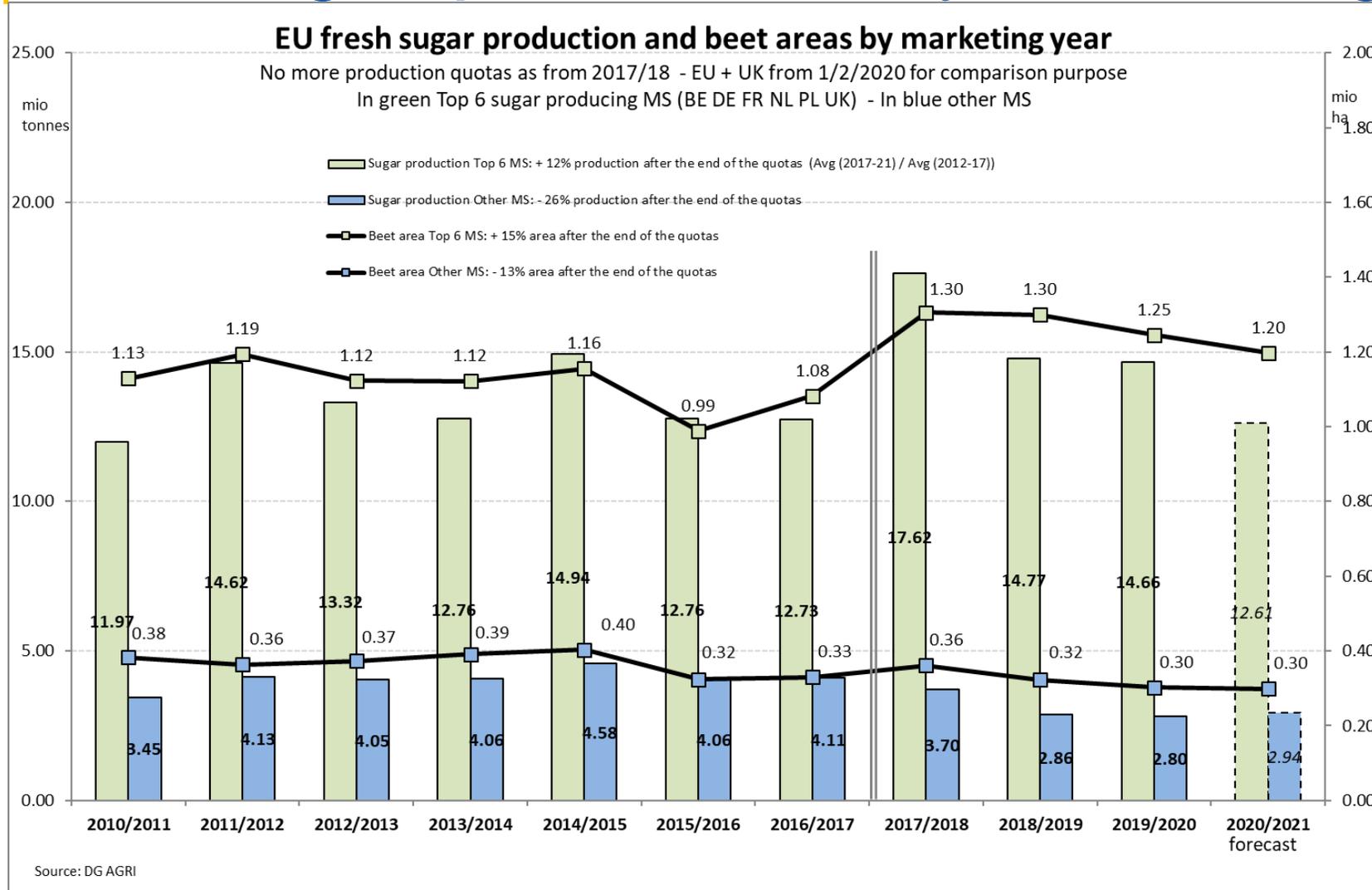
- **2019/20** (final) compared to 2018/19

Area - 4.6%
 Production - 1.0%

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

Area - 3.5%
 (EU - 4.0%)
 Production - 10%
 (EU - 9%)

EU Sugar production by Marketing Year Jan. 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 - 10%
 (EU - 9%)

2020/2021 - Sugar Production – 28 Jan. 2020

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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	13.7	1 140 207	4%
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	8.3	2 100 000	2%
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	10.4	14 648 006	-10%
LT	14.7	9.4	137 518		UK	92.0	11.6	900 000	-24%
					TOTAL	1 495	10.4	15 548 006	-11%

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

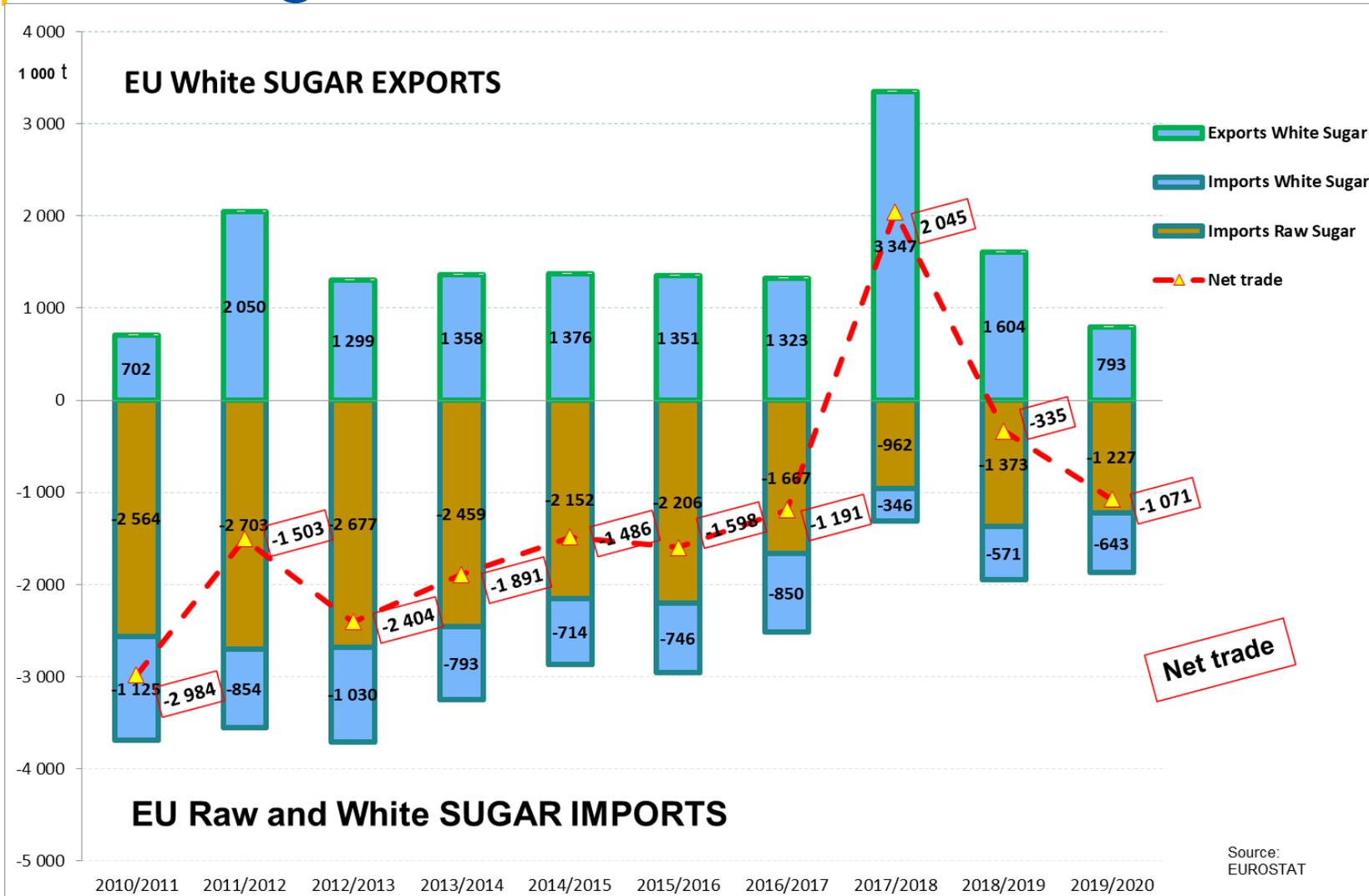
- Impact of Brexit:
 - Duty and quota free trade for agricultural products
 - ‘Rules of Origin’: products exported from the UK that benefit from duty free access to the EU must be produced in the UK
 - White sugar refined from imported raw sugar does not comply to the rules
 - Application of the ‘Rules 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

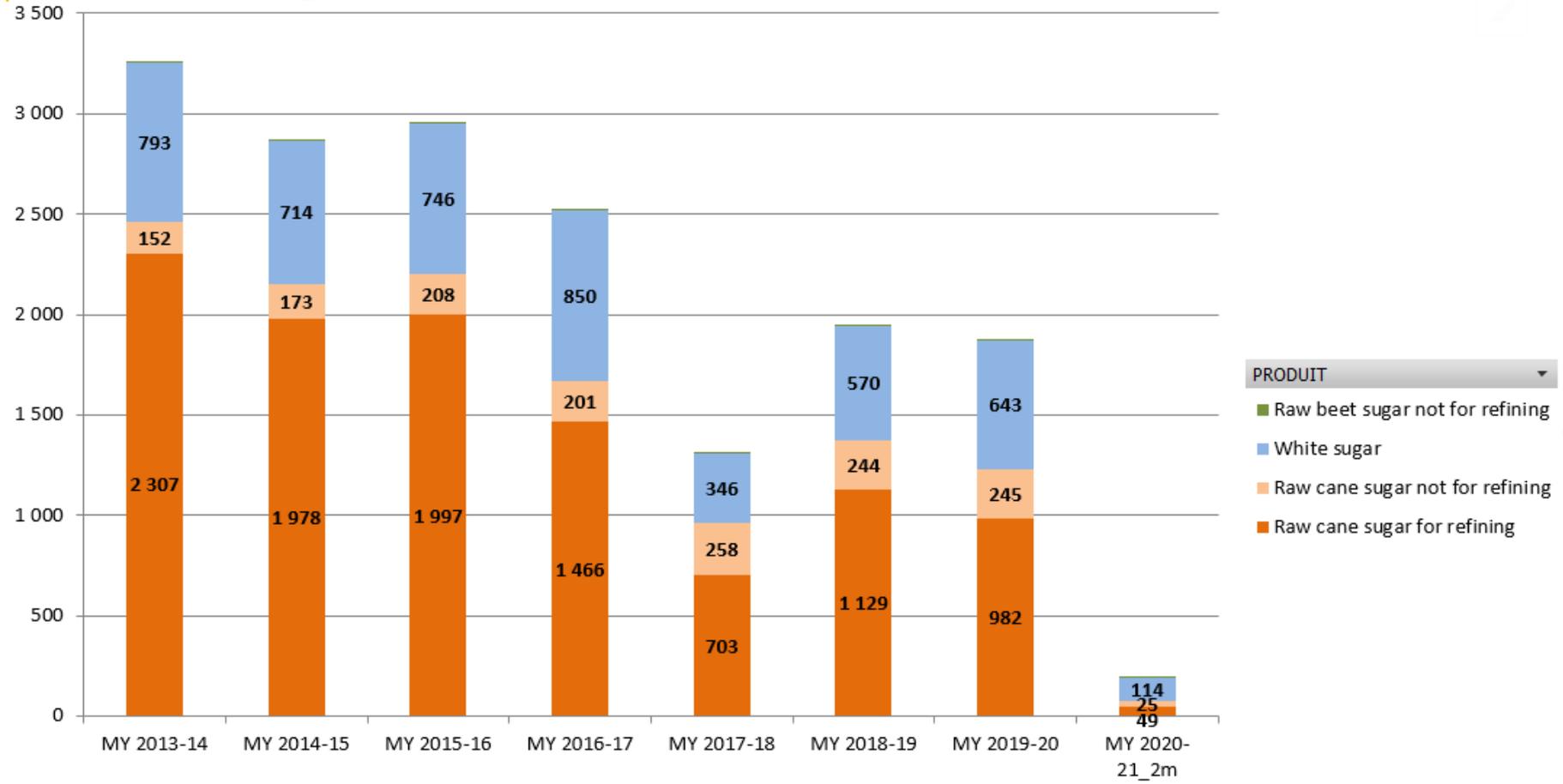
- Forecast 2020/21 for EU based on:
 - Current EU sugar production forecast around 14.65 million tonnes (Jan. 21)
 - EU sugar consumption/disappearance very similar to previous MY
 - EU sugar trade with third countries other than UK similar to previous MY
 - However, EU sugar trade with the UK will be 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

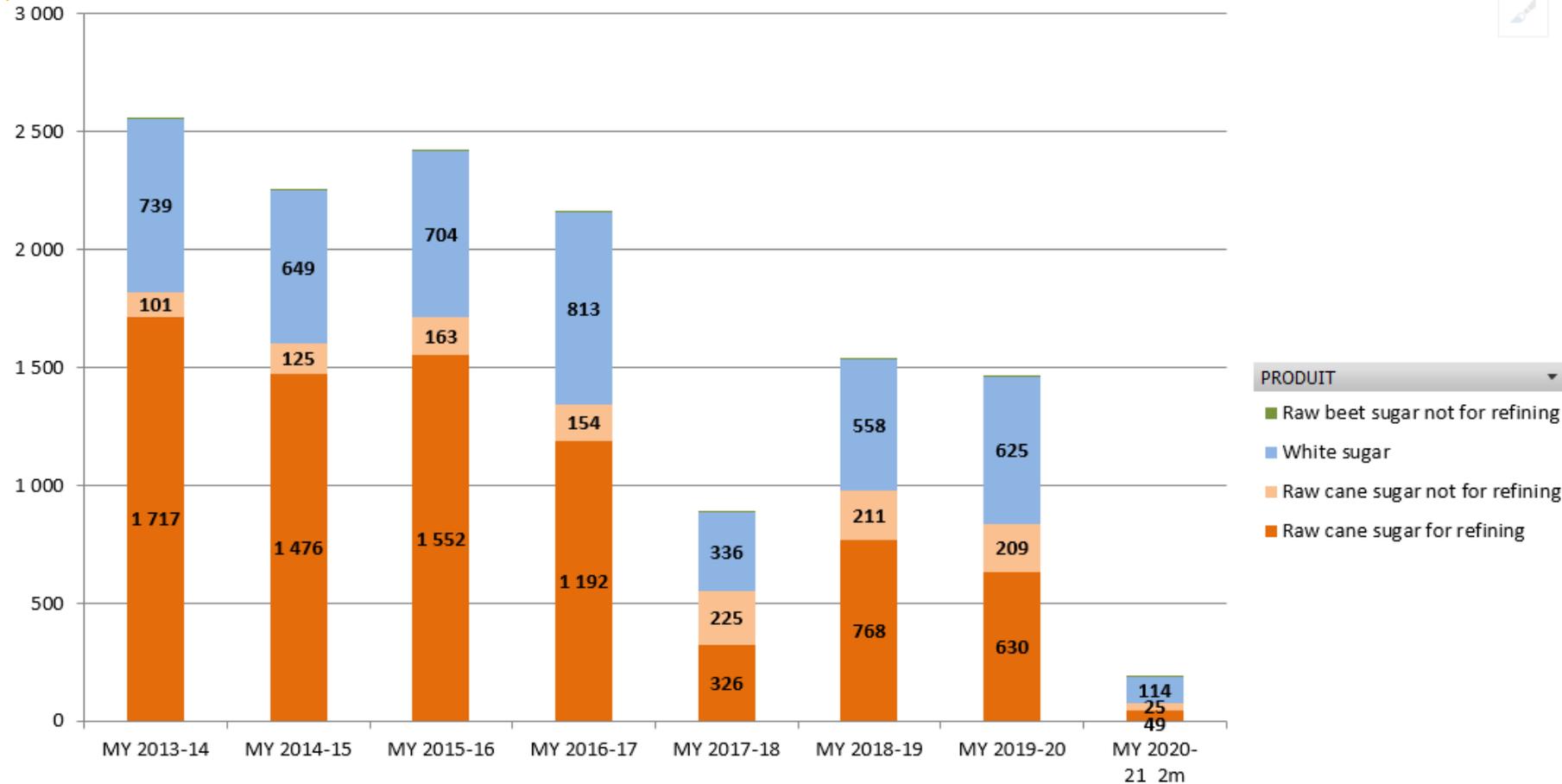
EU Sugar imports (EU + UK from 1/2/2020 to 30/9/20)



- EU 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 imports (EU without UK)

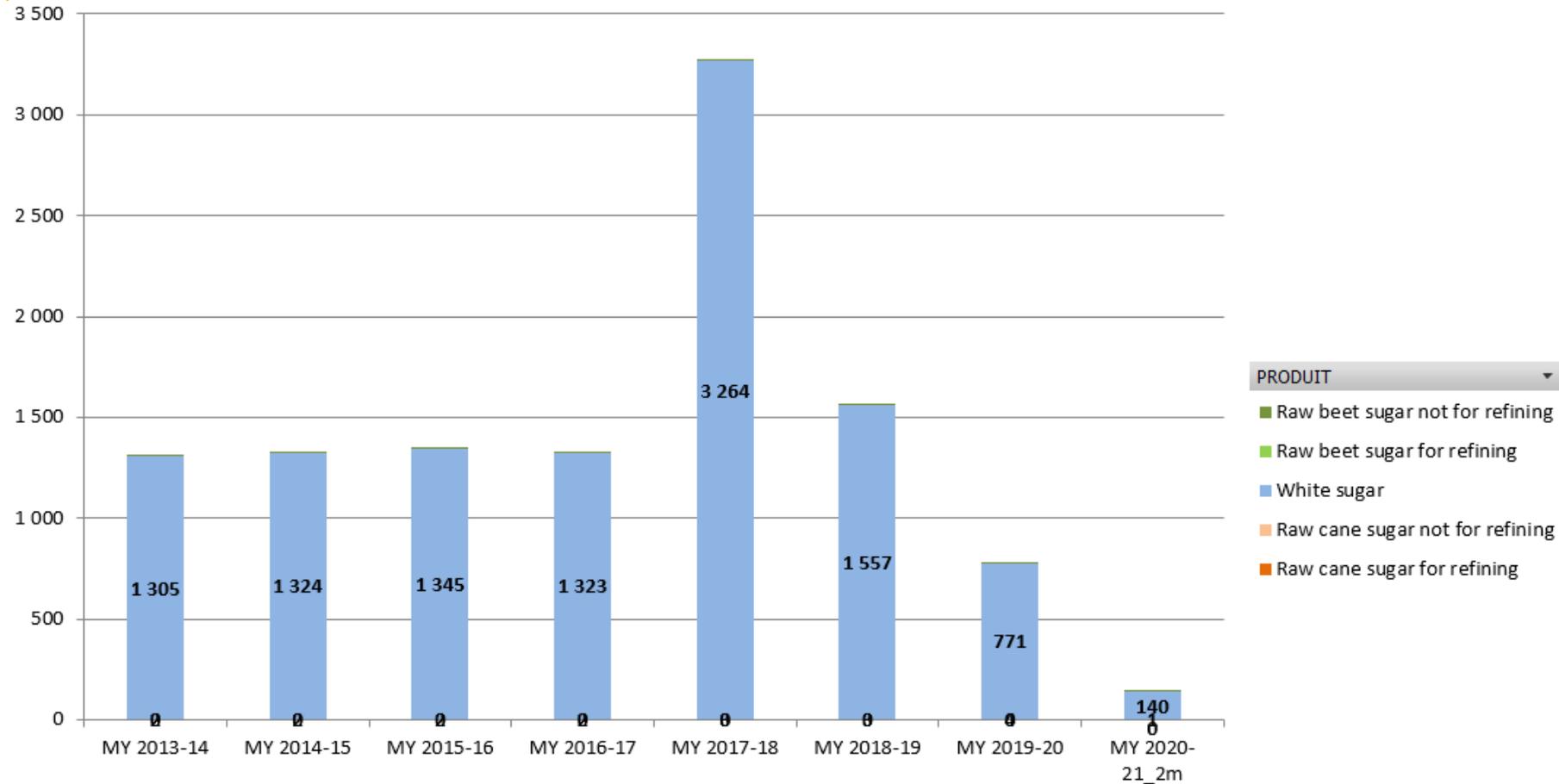


- EU without UK total sugar imports from third countries in 1 000 tonnes split by

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

Source:
EUROSTAT

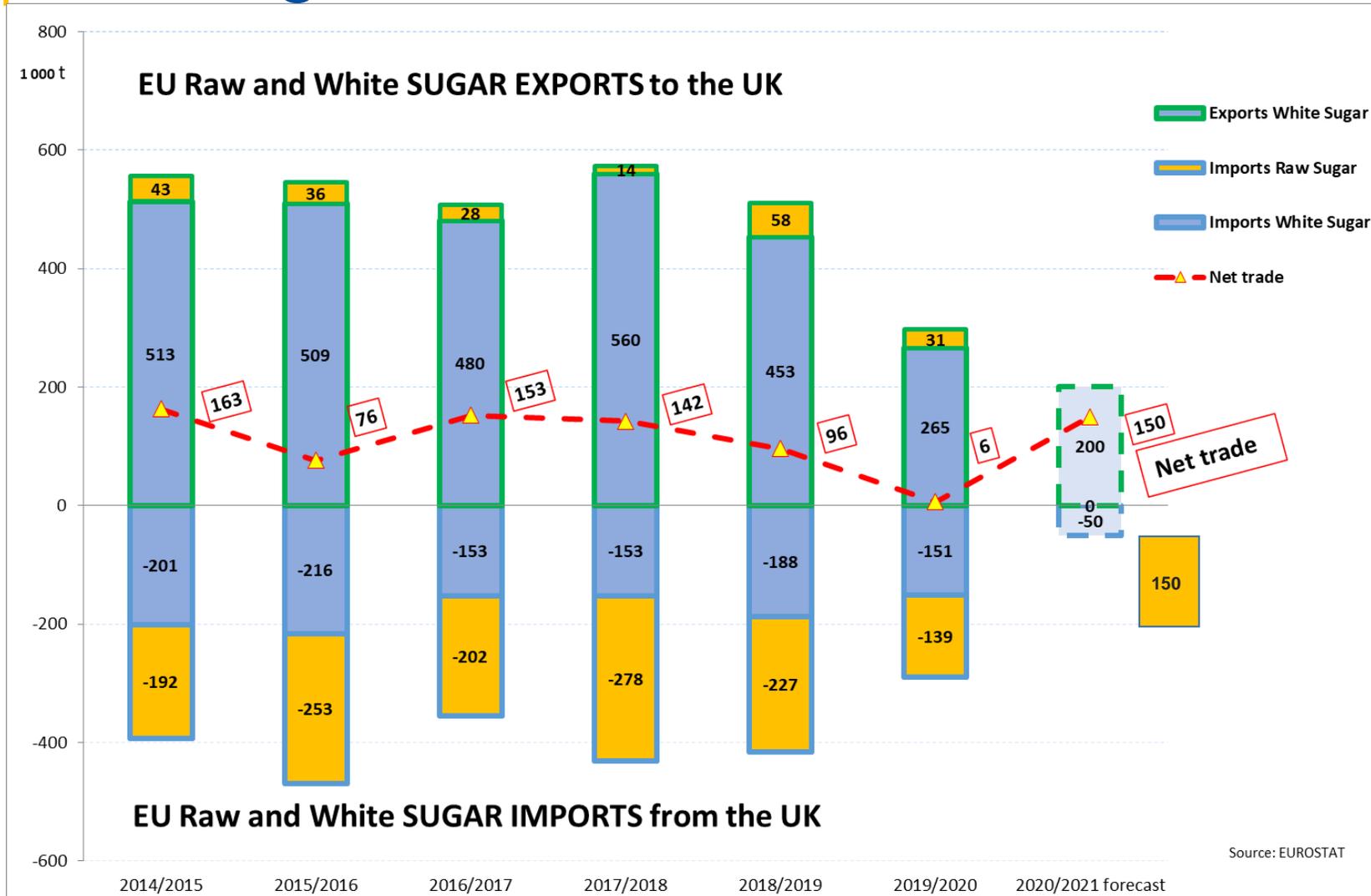
Sugar exports (EU without UK)



- 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

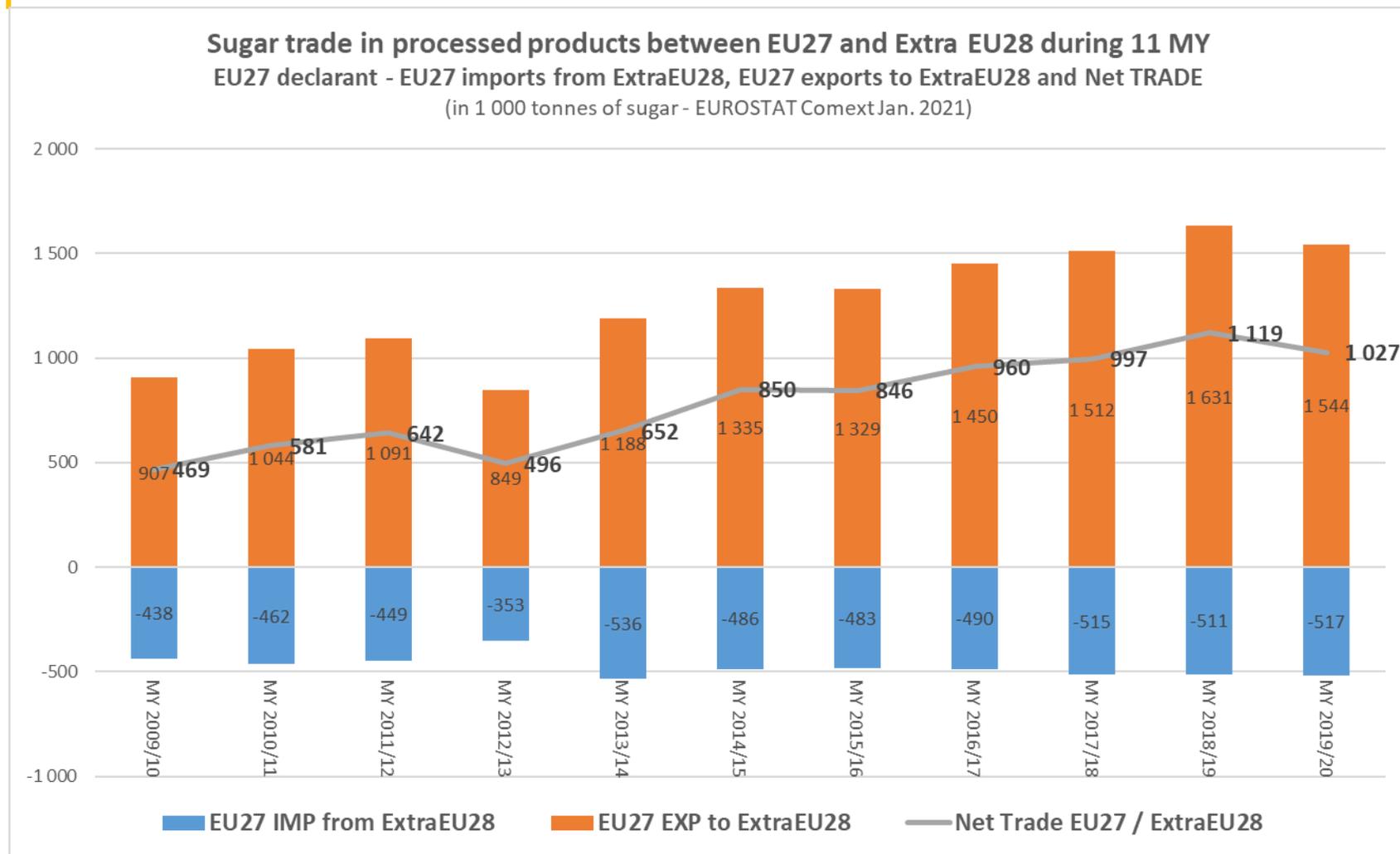
SUGAR BALANCE SHEET

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

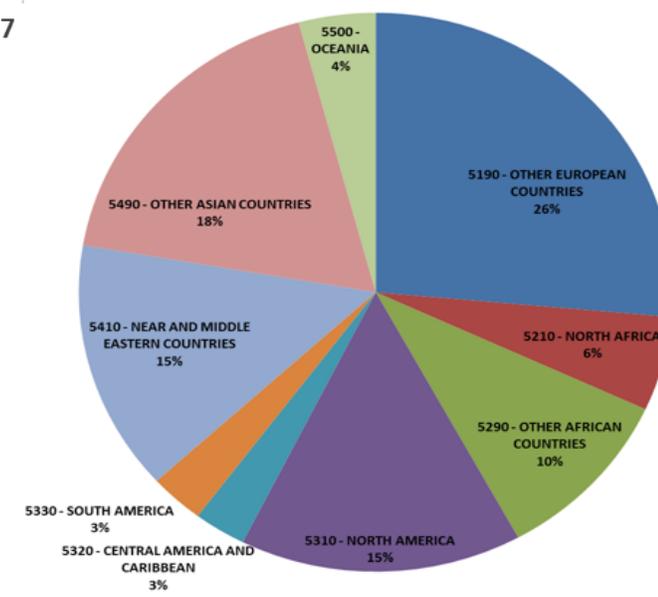
Sugar in processed products

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



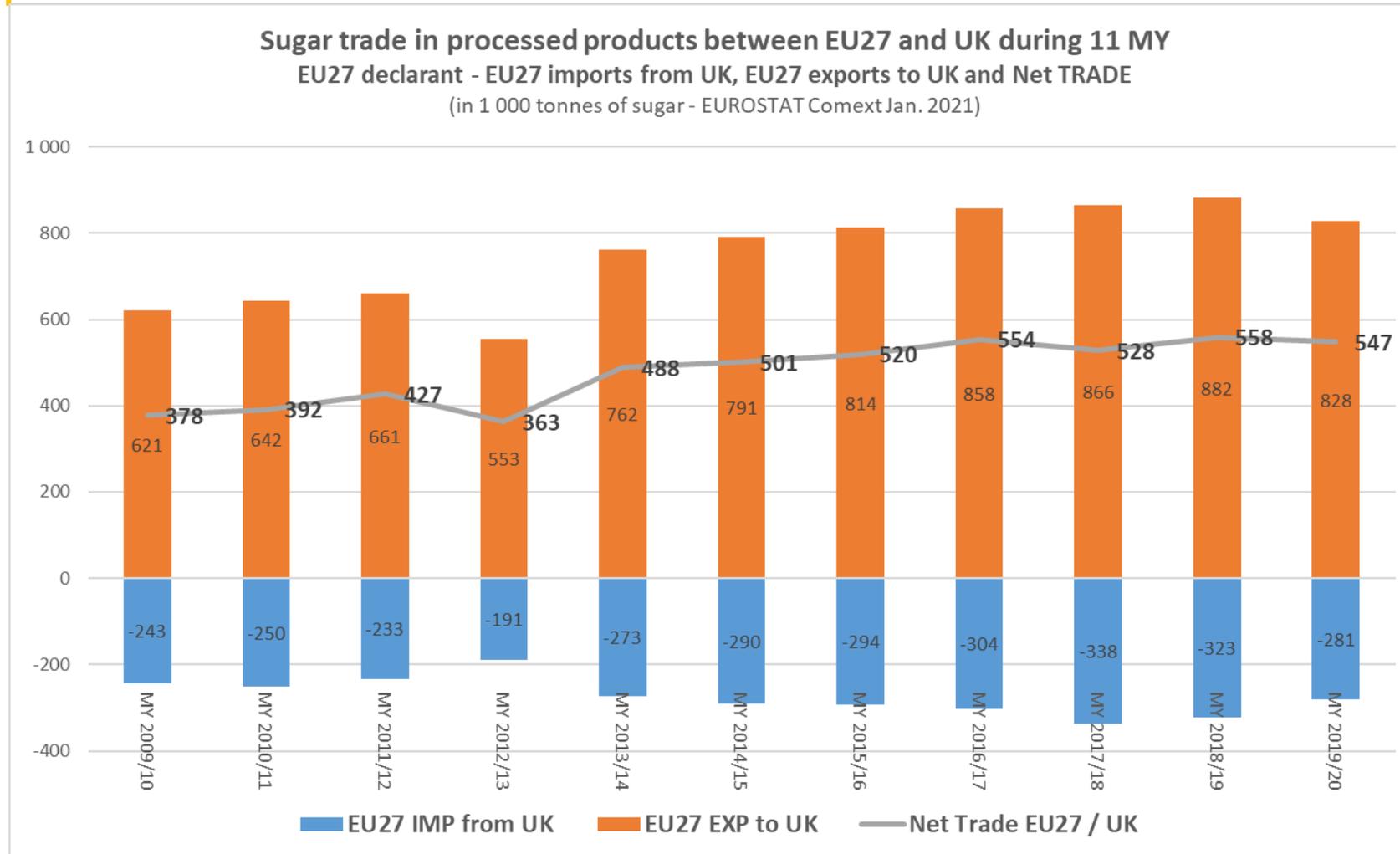
EU exports of sugar in processed products

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 – 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 Beginning stocks				
14 648	570	2 Production				
2 300	5	3 Imports				
<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						
19 108	588	4 TOTAL AVAILABLE				
		<i>4 = 1 + 2 + 3</i>				

- Rounded UK stocks deducted (- 0.2 million tonnes)
- EU 27 MS sugar production forecast (14.55 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 – 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	5 Consumption/disappearance
800		of which industrial use
600		of which bioethanol
13 550		other
3 000	45	6 Exports
900		6 1 - as such
2 100		6 2 in processed products
1 158	15	7 Ending stocks
19 108	588	8 TOTAL OUTLETS
		$8 = 5 + 6 + 7 = 4$

- 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)

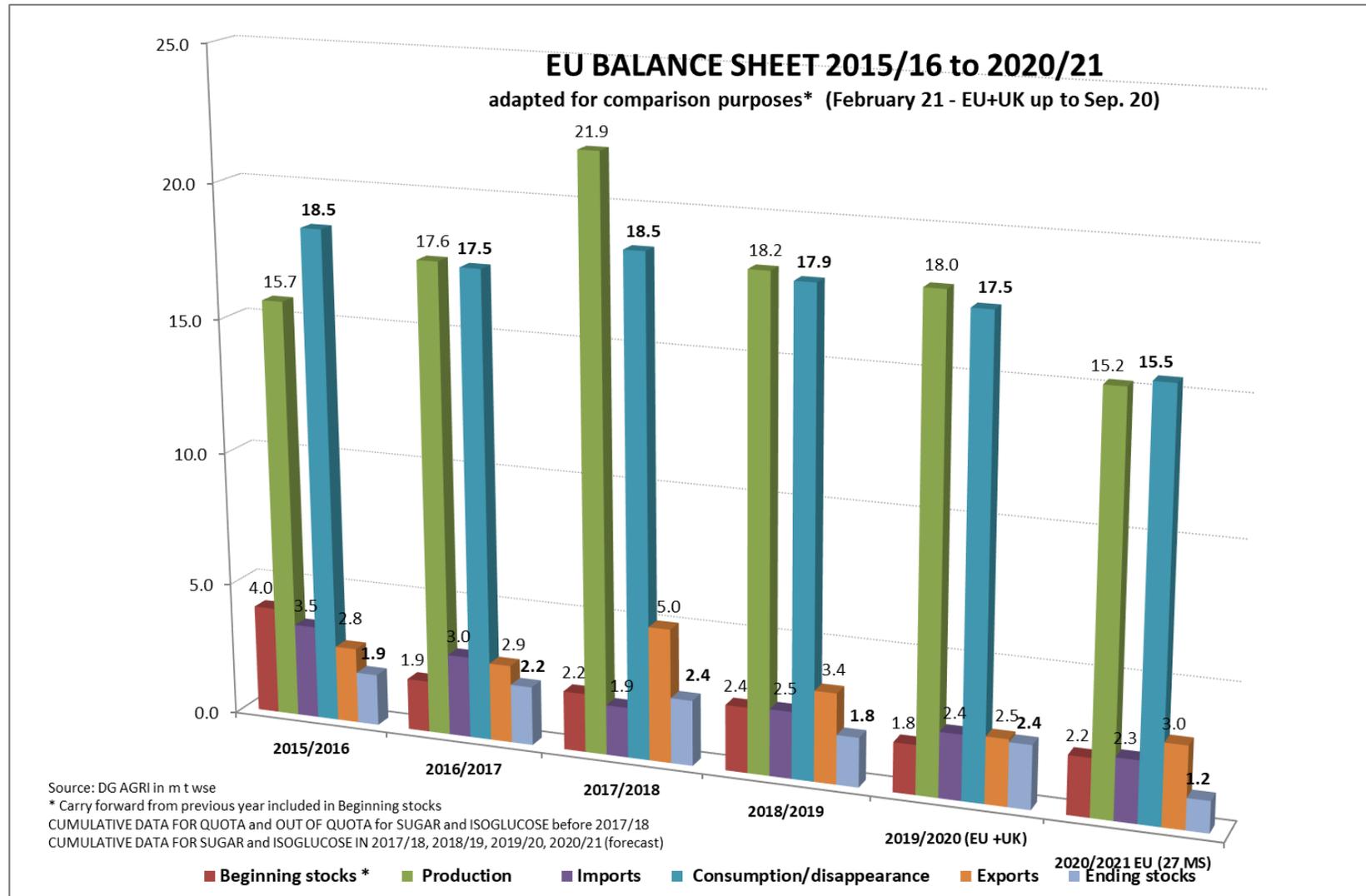
SUGAR AND ISOGLUCOSE BALANCE SHEET

2017/18 – 2020/21 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	14 648	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	19 108	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	1 158 	15	7 Ending stocks
25 360	641	22 542	592	21 719	585	19 108	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.”