



Sugar Market situation

AGRI E 4 - Expert Group Common Market Organisation on
Arable Crops

30 April 2026

World Sugar Market

Exchange rates (24/04/2026)

ECB euro exchange rate to the USD



Source: ECB

- Euro – Dollar exchange rate:
1 € = \$ 1.17
- One month ago*
1€ = \$ 1.16

*Figures presented at the previous Committee

Exchange rates (24/04/2026)

ECB euro exchange rate to the Brazilian real



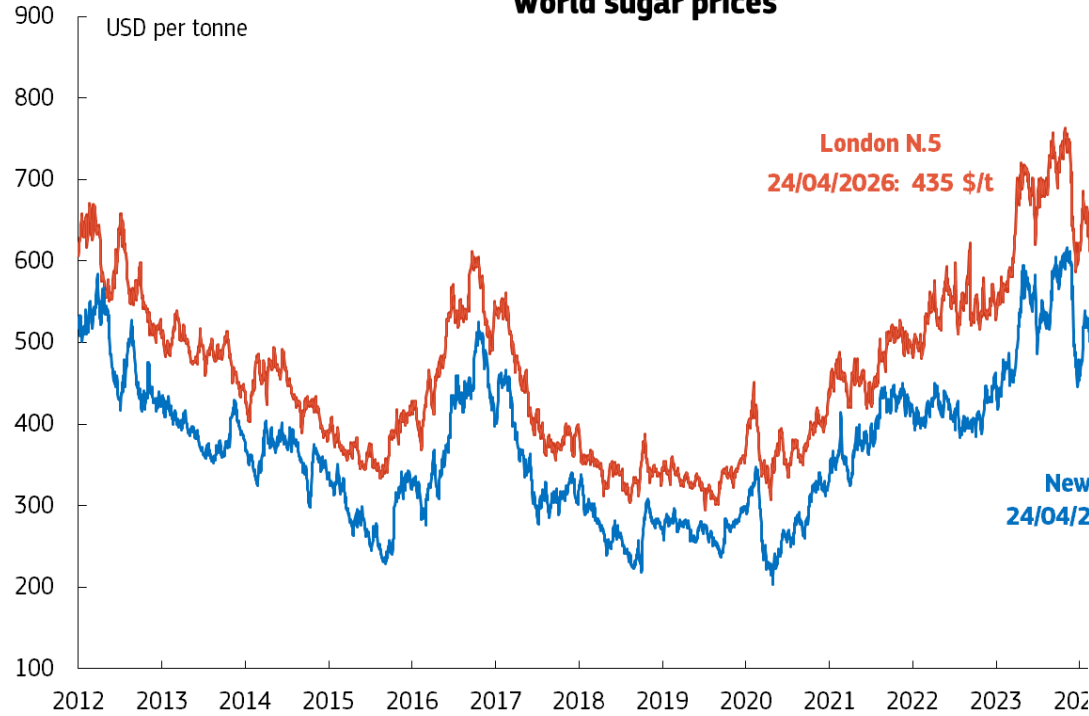
Source: ECB

- Euro – Real exchange rate:
1 € = 5.86 Real
- One month ago*:
1€ = 6.07 Real

*Figures presented at the previous Committee

World prices

World sugar prices



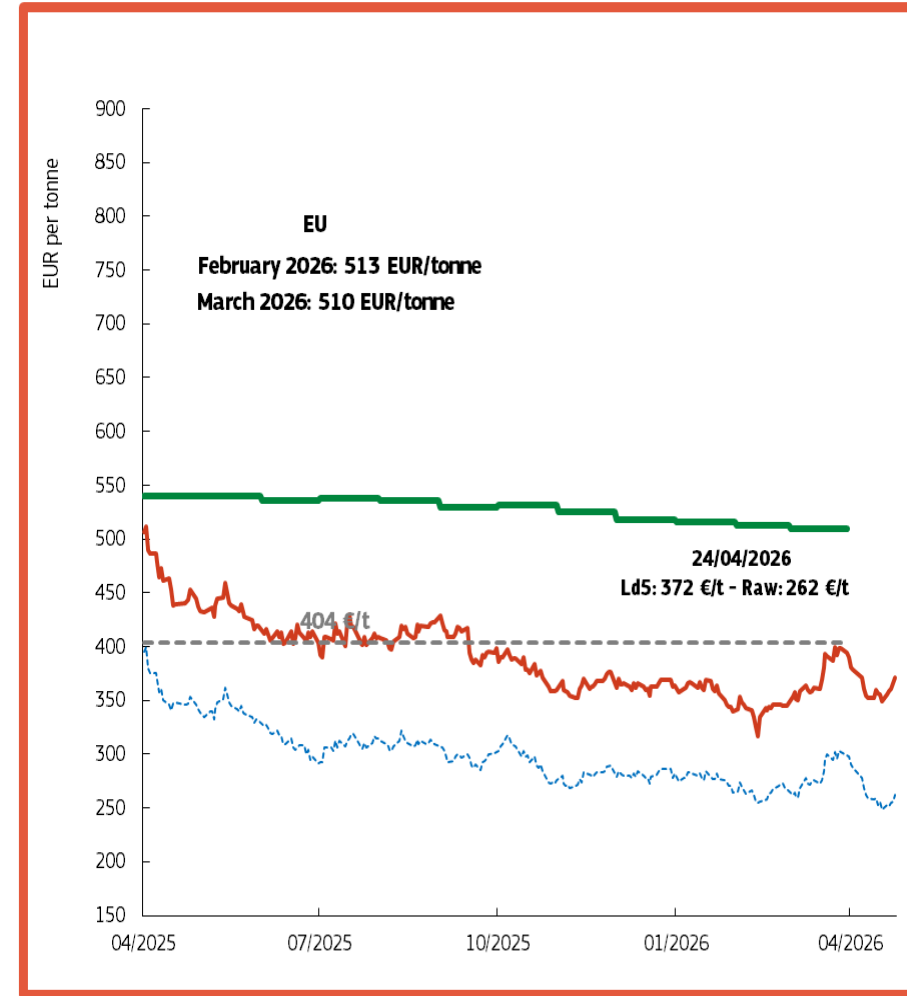
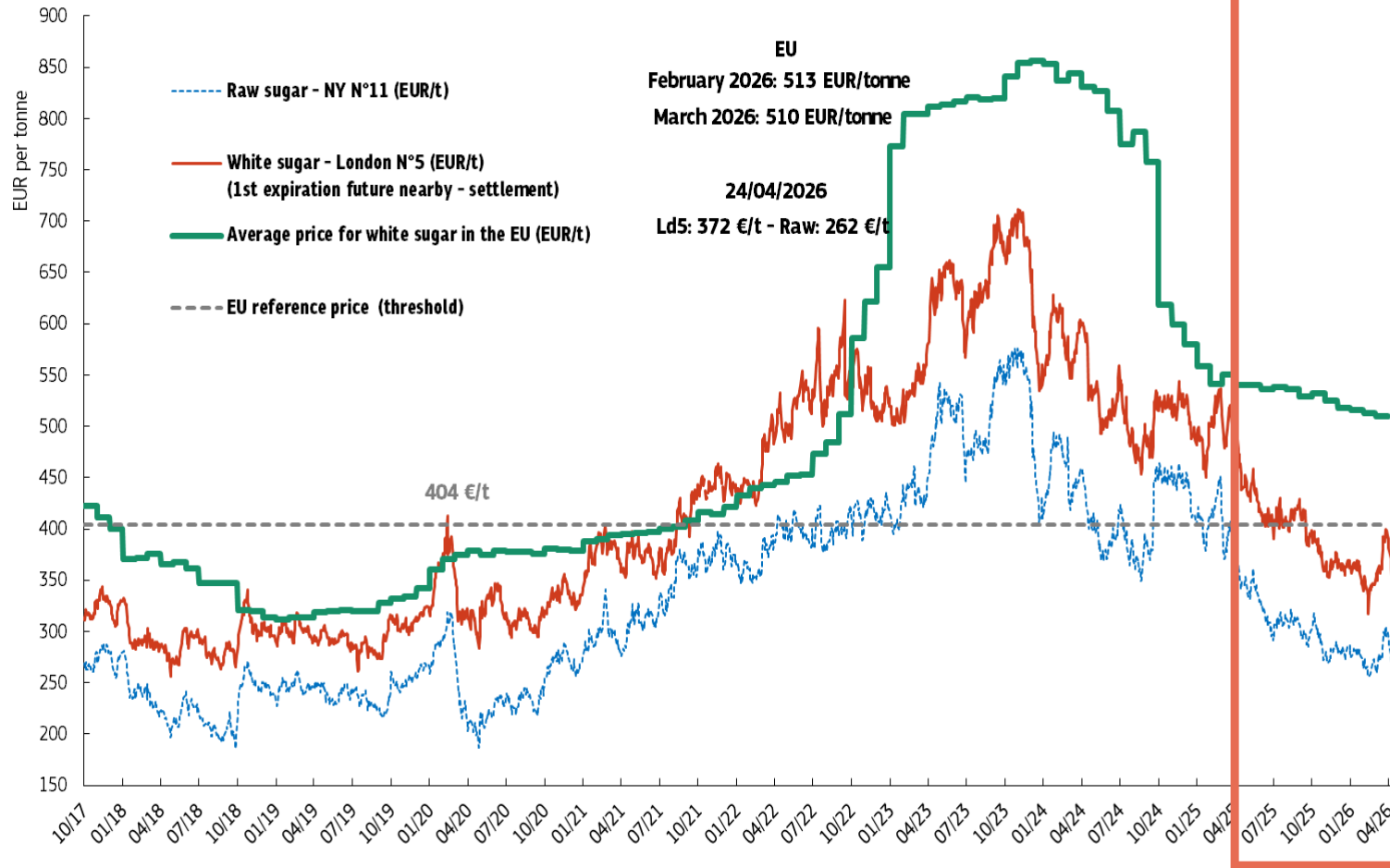
		24/04/2026	in EUR/t	vs. 20/03/2026
White sugar (LD5)	Aug.26	435.3 \$/t	371.7 €/t	-4.2%
	Oct.26	432.2 \$/t	369 €/t	-5.3%
Raw sugar (NY11)	May.26	13.9 \$cts/lb	262.2 €/t	-11.3%
	Jul.26	14.1 \$cts/lb	265.6 €/t	-10.9%

White premium: 128 \$/t on Aug./May. basis (white/raw).



World prices

EU and Sugar world market prices since 1 October 2017 (EUR/t)



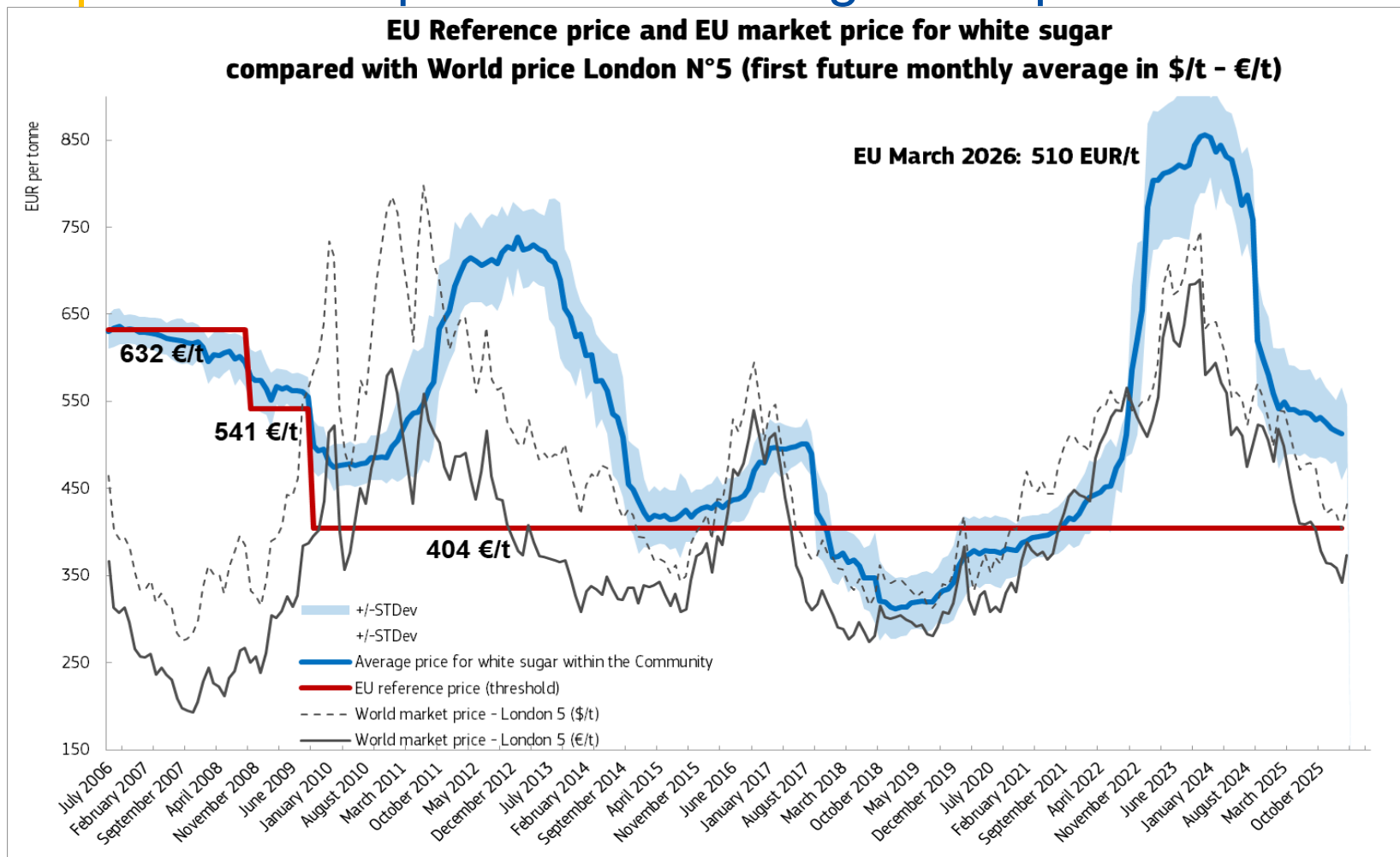


Sugar Price reporting

AGRI E 4 - Expert Group Common Market Organisation on
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30 April 2026

EU market price for white sugar compared with World price London N°5



London N°5 (Mar.2026):

- + EUR 32 per tonne compared to previous month (+9.5%).
- - EUR 145 per tonne compared to Mar.2025(-29%)

EU and Regional market prices for white sugar

Average price for white sugar within the Community

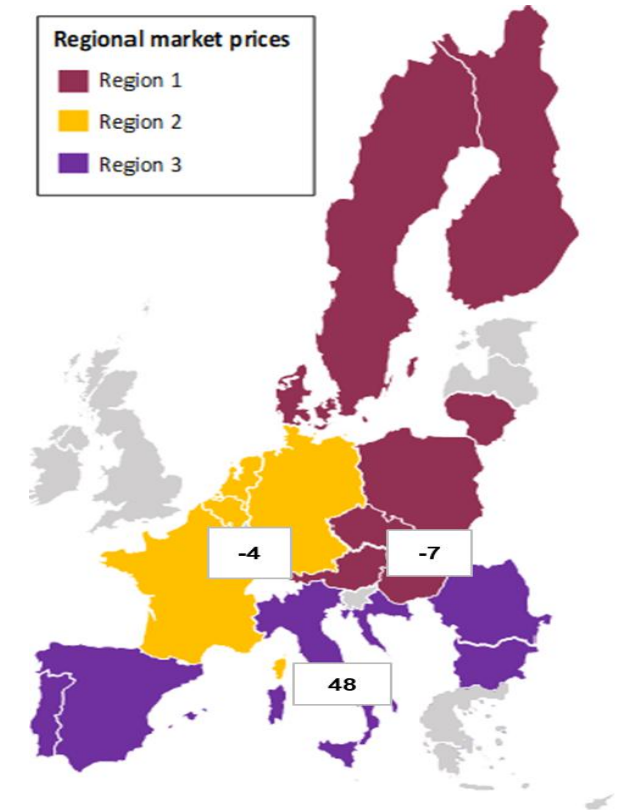
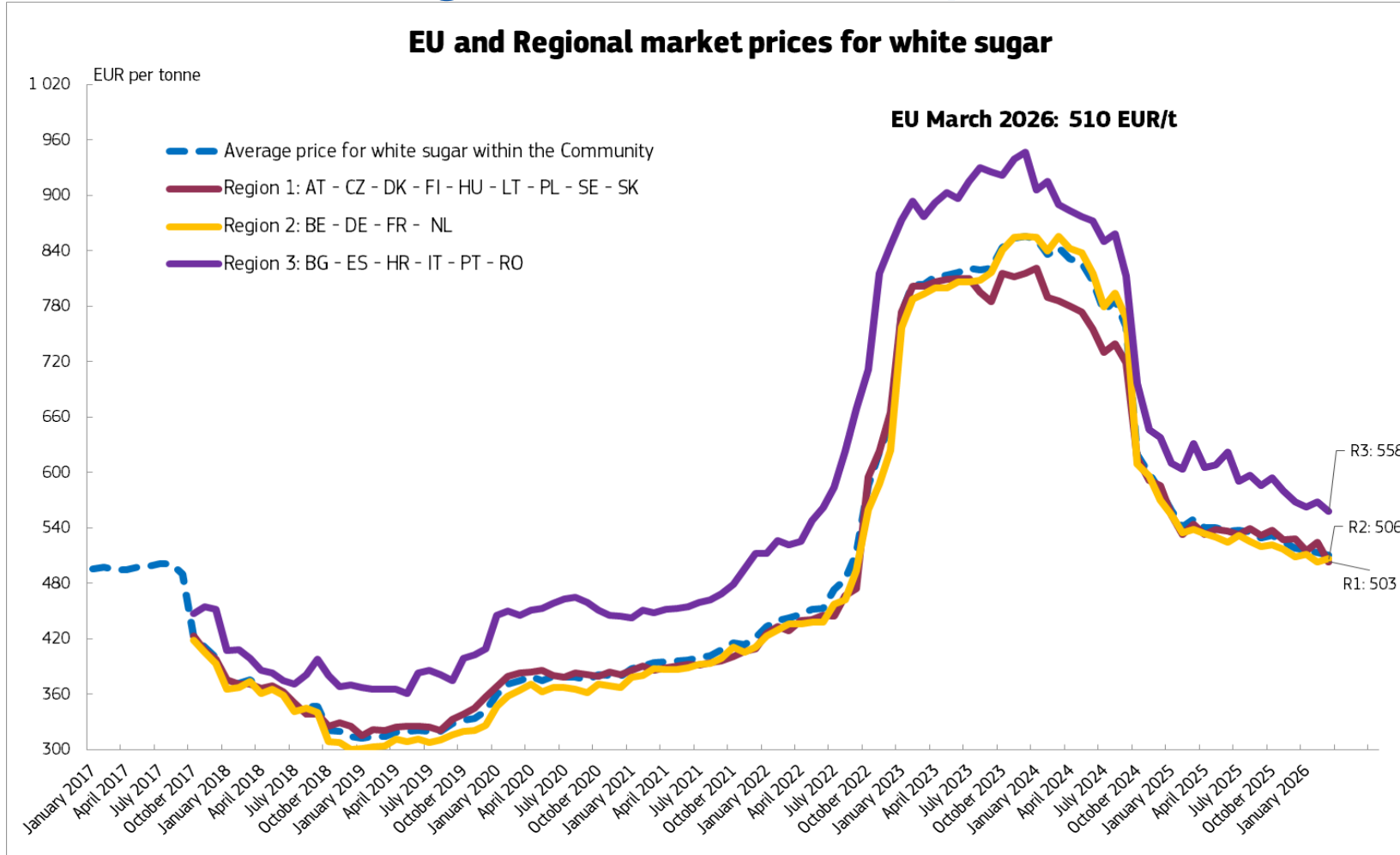
Ex-work prices for homogeneous granulated crystal, standard quality, in bulk or big bags

Region 1: AT - CZ - DK - FI - HU - LT - PL - SE - SK
 Region 2: BE - DE - FR - NL
 Region 3: BG - ES - HR - IT - PT - RO

in €/t	EU		Region 1	Region 2	Region 3
	average (1)	std dev (2)	average (1)	average (1)	average (1)
March 2025	550	62	544	538	631
April 2025	540	51	532	534	606
May 2025	540	51	538	530	608
June 2025	536	49	537	524	622
July 2025	538	48	533	532	591
August 2025	536	51	539	525	597
September 2025	529	45	532	520	585
October 2025	532	46	538	522	594
November 2025	525	41	528	517	580
December 2025	518	40	528	509	568
January 2026	516	35	515	511	563
February 2026	513	53	525	503	568
March 2026	510	36	503	506	558

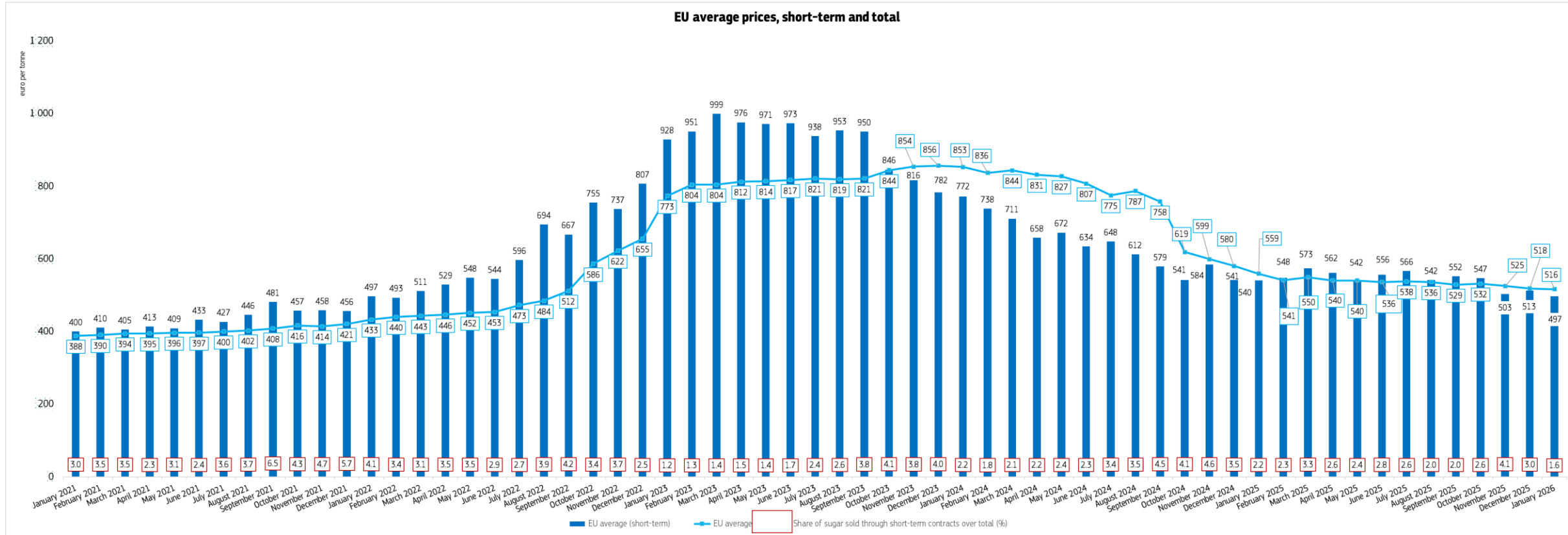
- -40 EUR/tonne compared to previous year

EU and Regional market prices for white sugar



Differences between EU average price and regional average prices

EU short-term prices

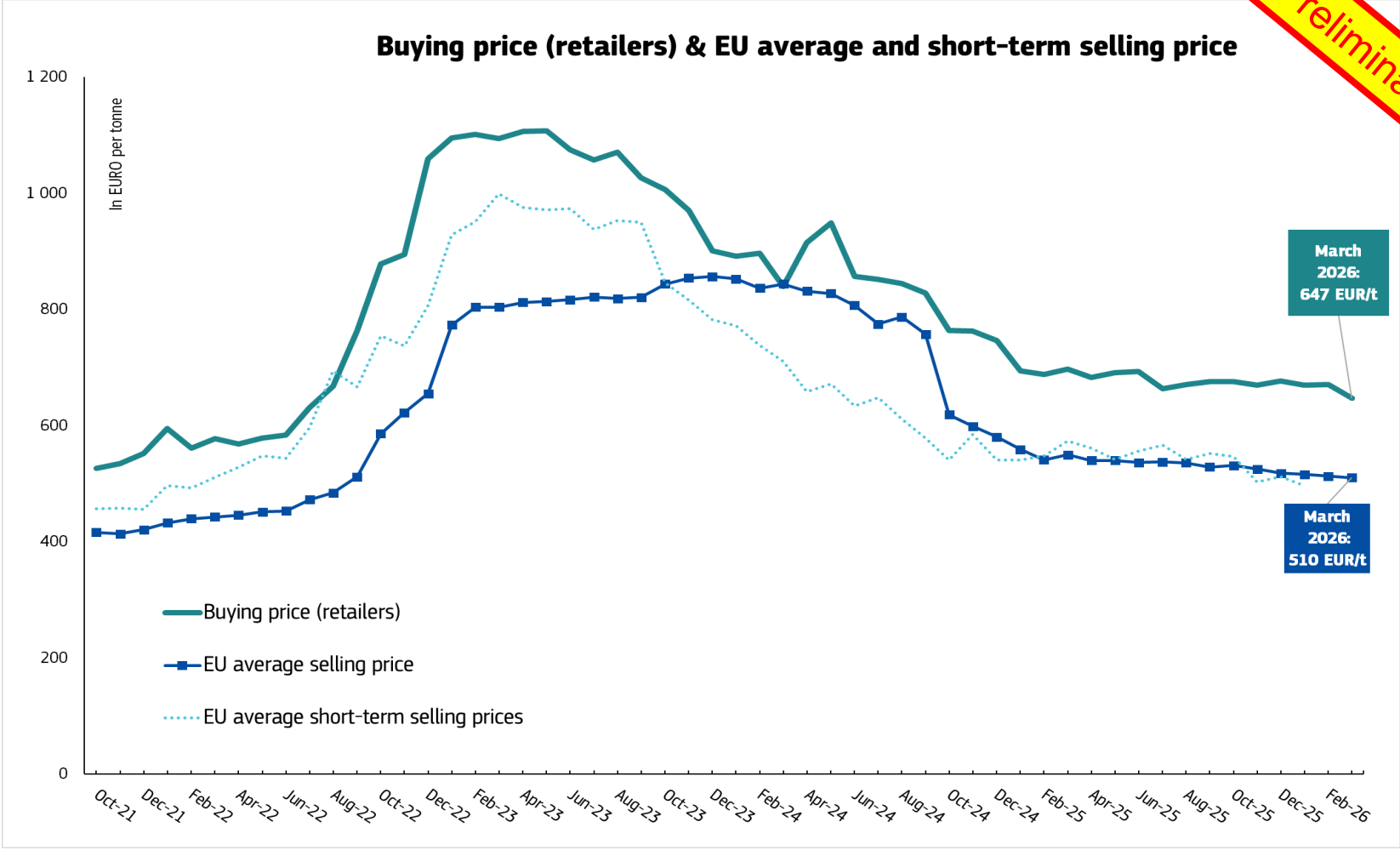


Legal basis: Commission Implementing Regulation (EU) 2017/1185 ANNEX II, point 3a

Source: MS notifications

EU sugar retailer buying prices

Preliminary data



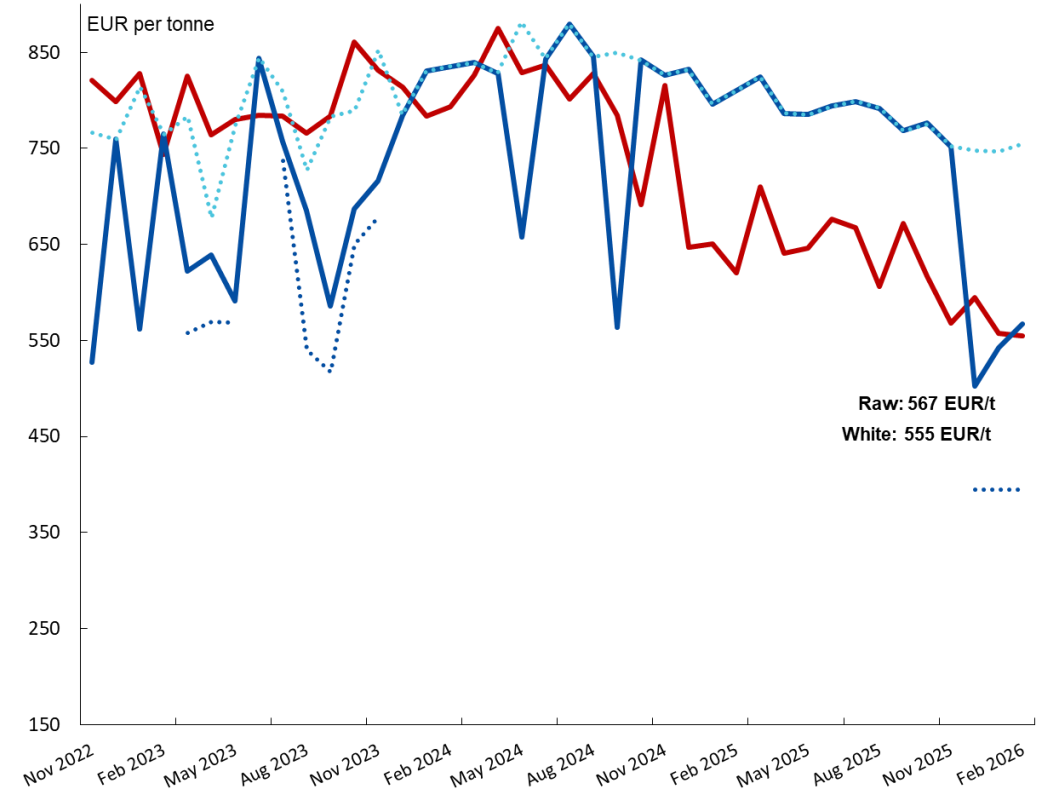
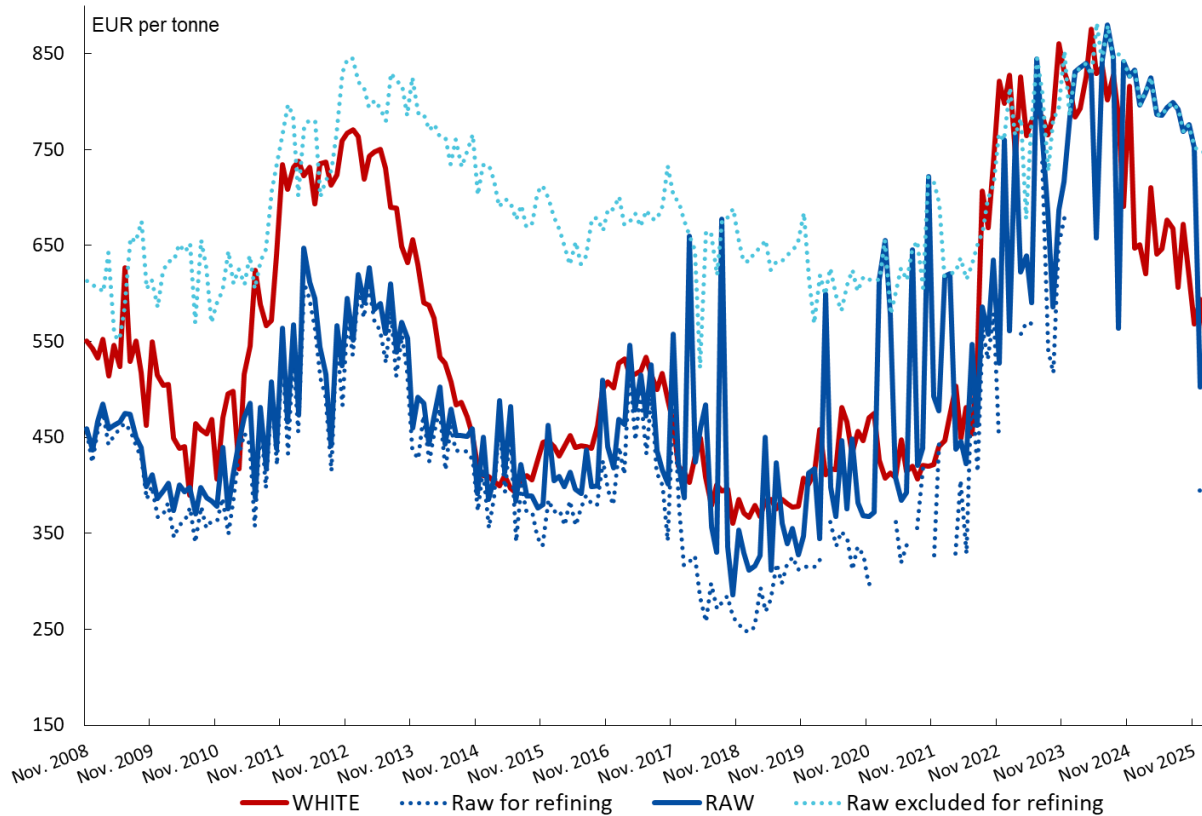
Source: MS communications



EPA / EBA average import value

Date	Raw for refining		Raw excluded for refining	
	(EUR/tonne)	tonnes	(EUR/tonne)	tonnes
Oct 2025	- €	10	775 €	9,439
Nov 2025	- €	22	752 €	8,886
Dec 2025	395 €	15,000	748 €	6,566
Jan 2026	395 €	12,333	747 €	8,873
Feb 2026	395 €	11,167	755 €	10,231

Average value for raw and white sugar imported from EPA/EBA countries



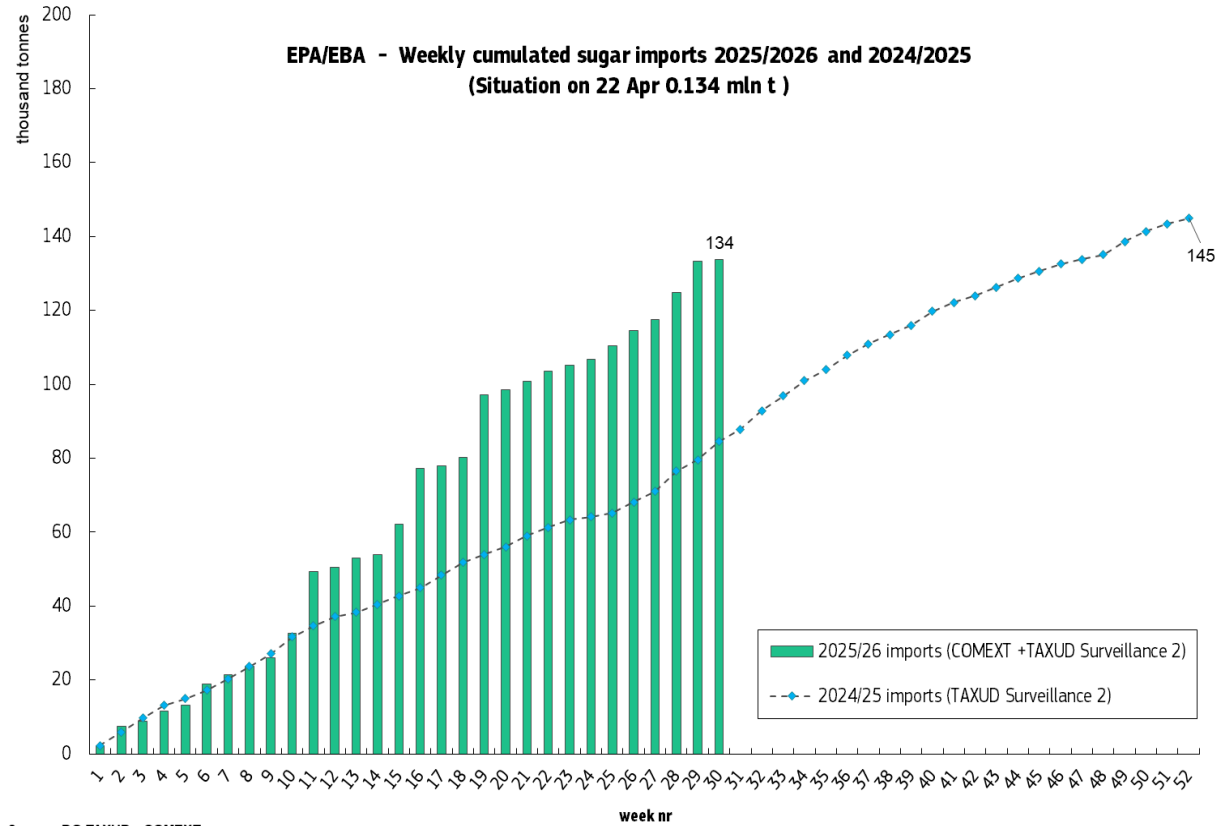


Sugar Trade statistics

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30 April 2026

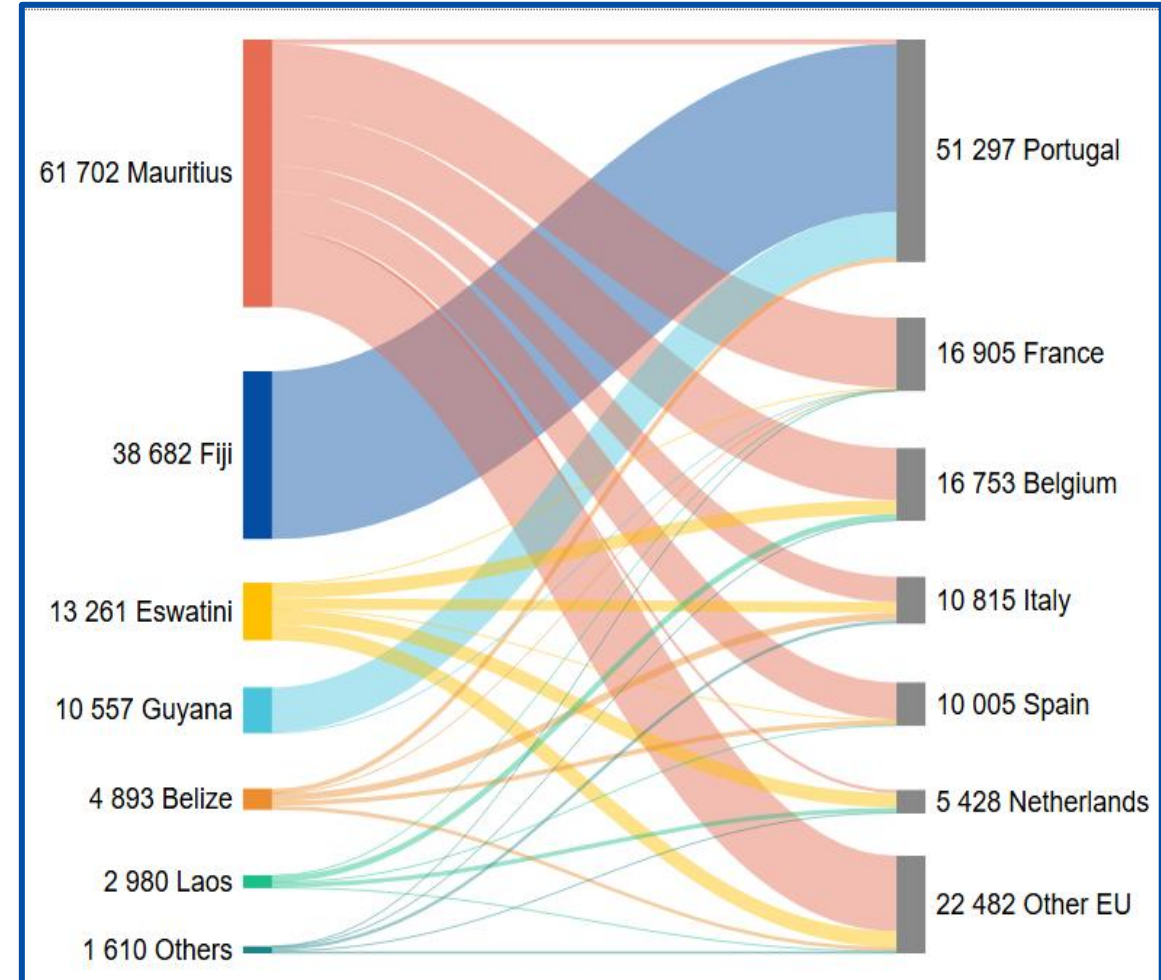
Imports EPA / EBA in 2025/2026



Source: DG TAXUD +COMEXT

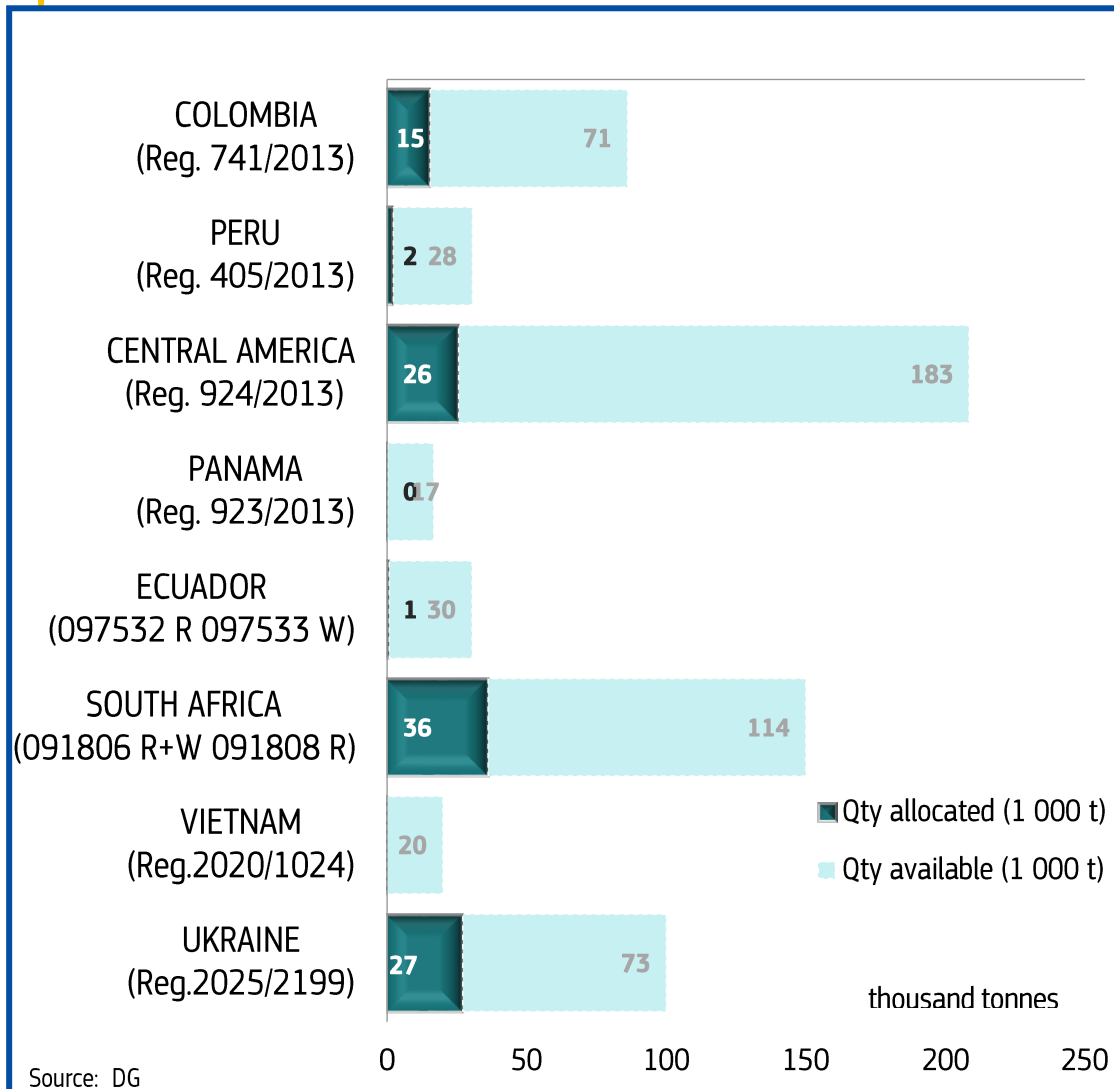
COMEXT (Oct-Feb) and TAXUD Surveillance

Origin and destination of EU imports from EPA/EBA (30 weeks marketing year 2025/26)

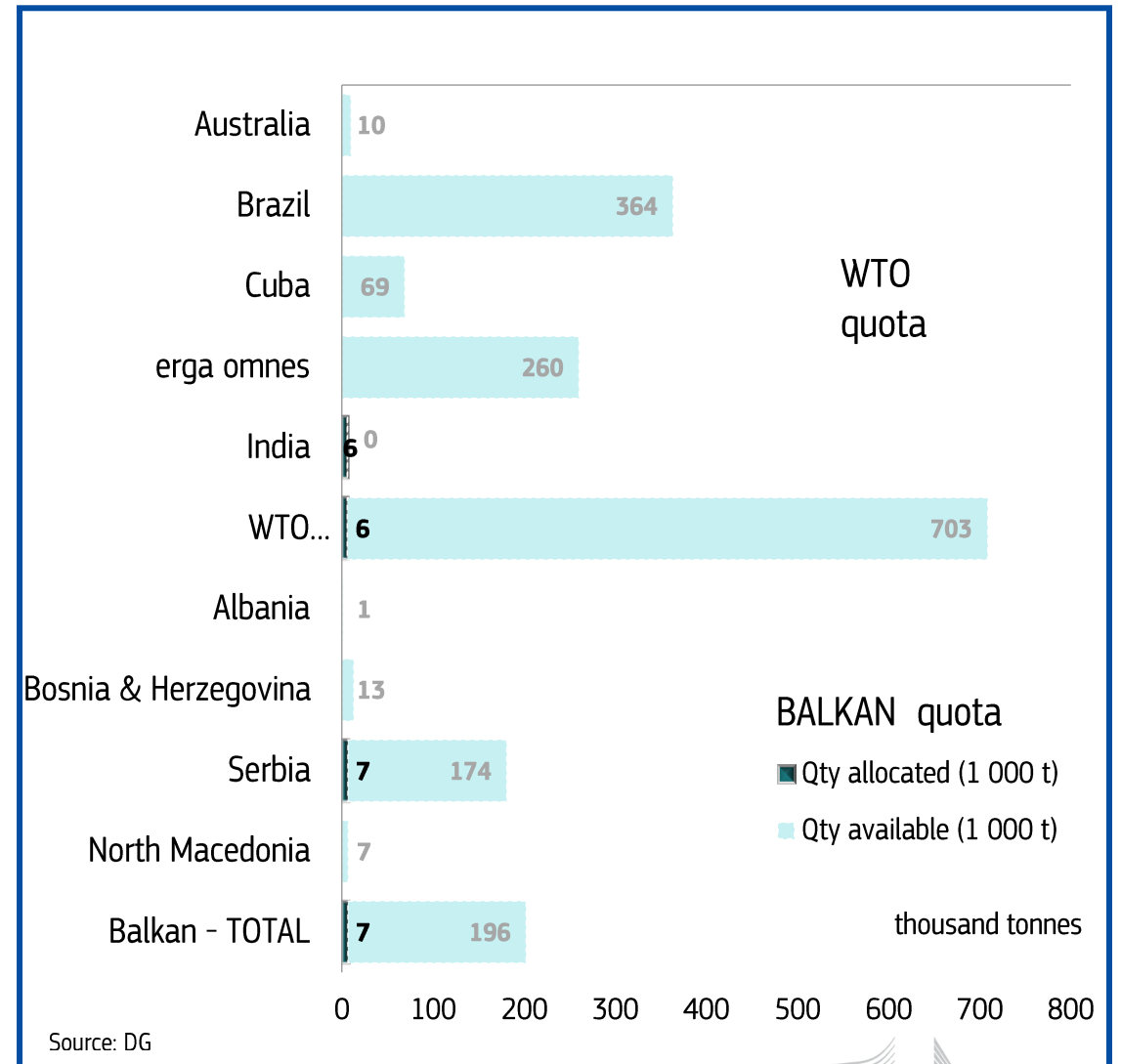


Sugar TRQs (22/04/2026)

SUGAR TRQs 2026



SUGAR TRQs 2025/2026

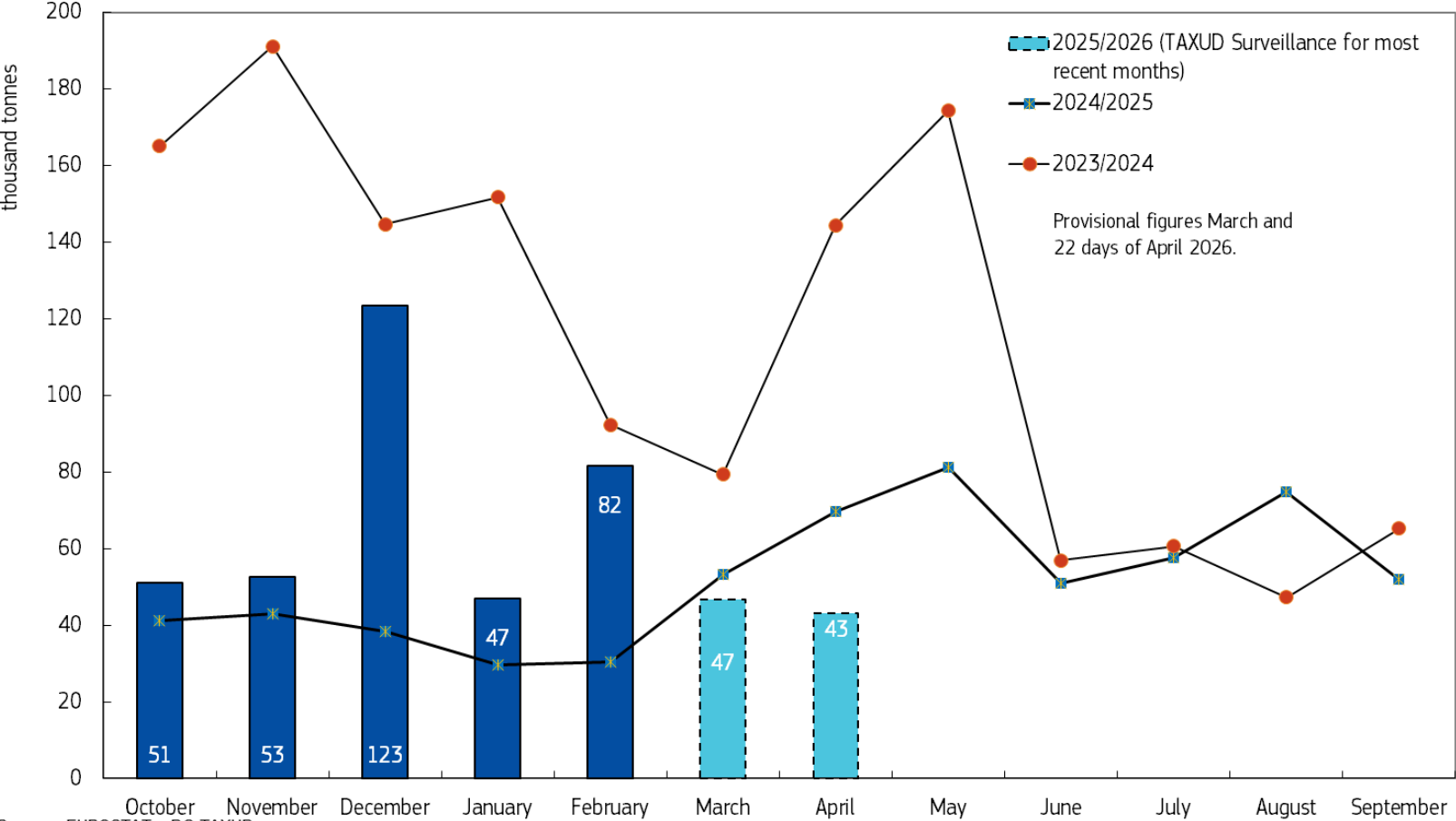


EU Total Sugar Trade Flows

EU Sugar Imports

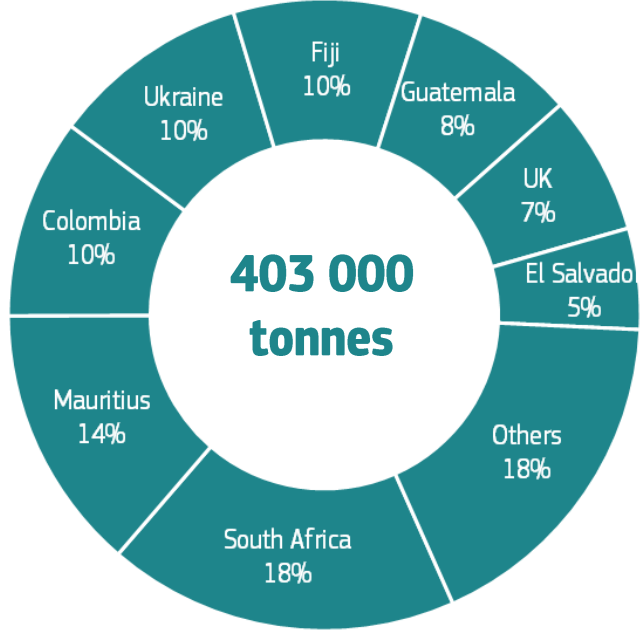
EU Total imports

EU Monthly sugar imports (CN 1701)



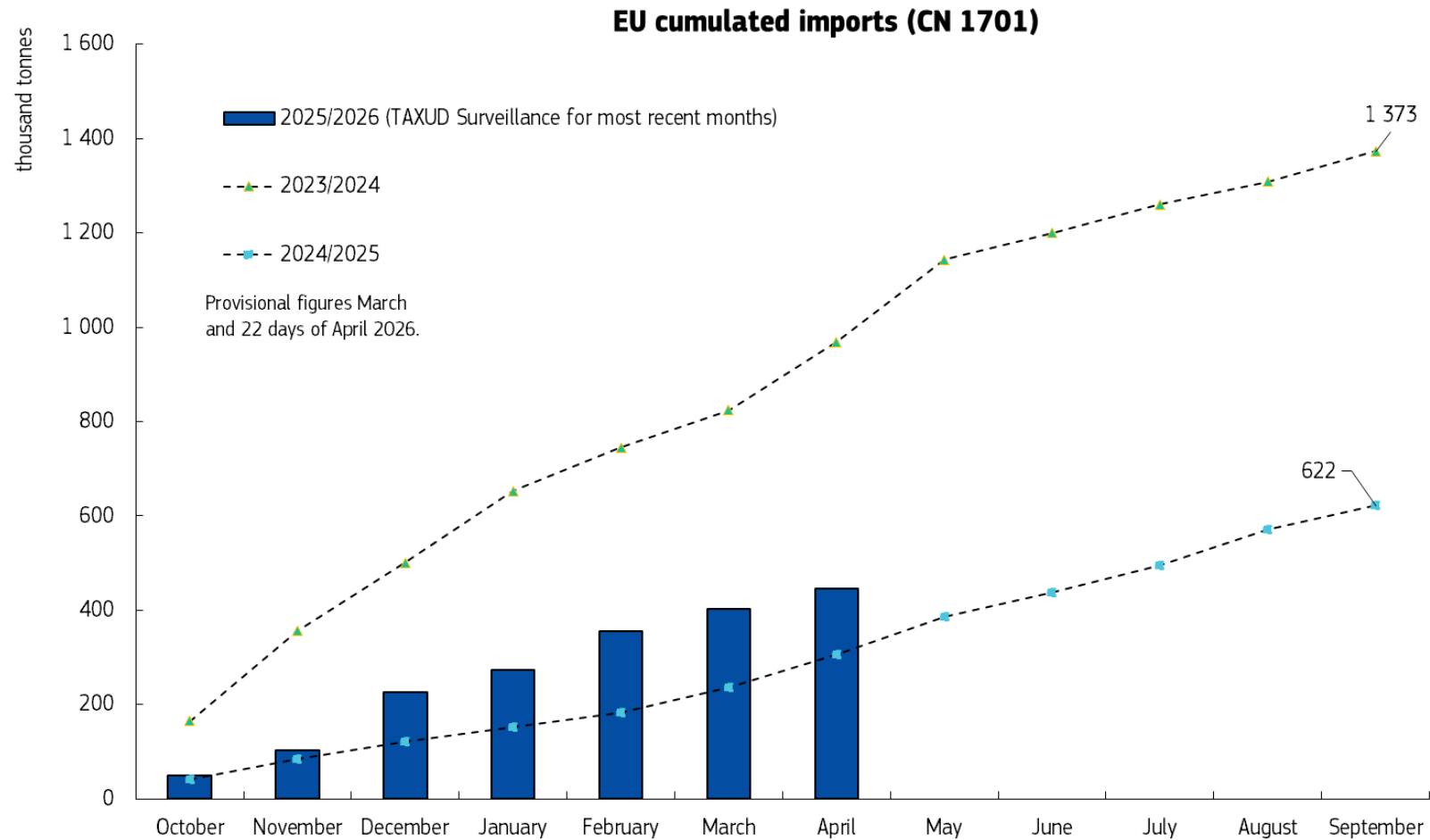
Sources: EUROSTAT - DG TAXUD

Source: TAXUD Surveillance and COMEXT.



EU imports by main origin
6 months MY 25/26
(COMEXT and TAXUD Surveillance)

EU Total imports

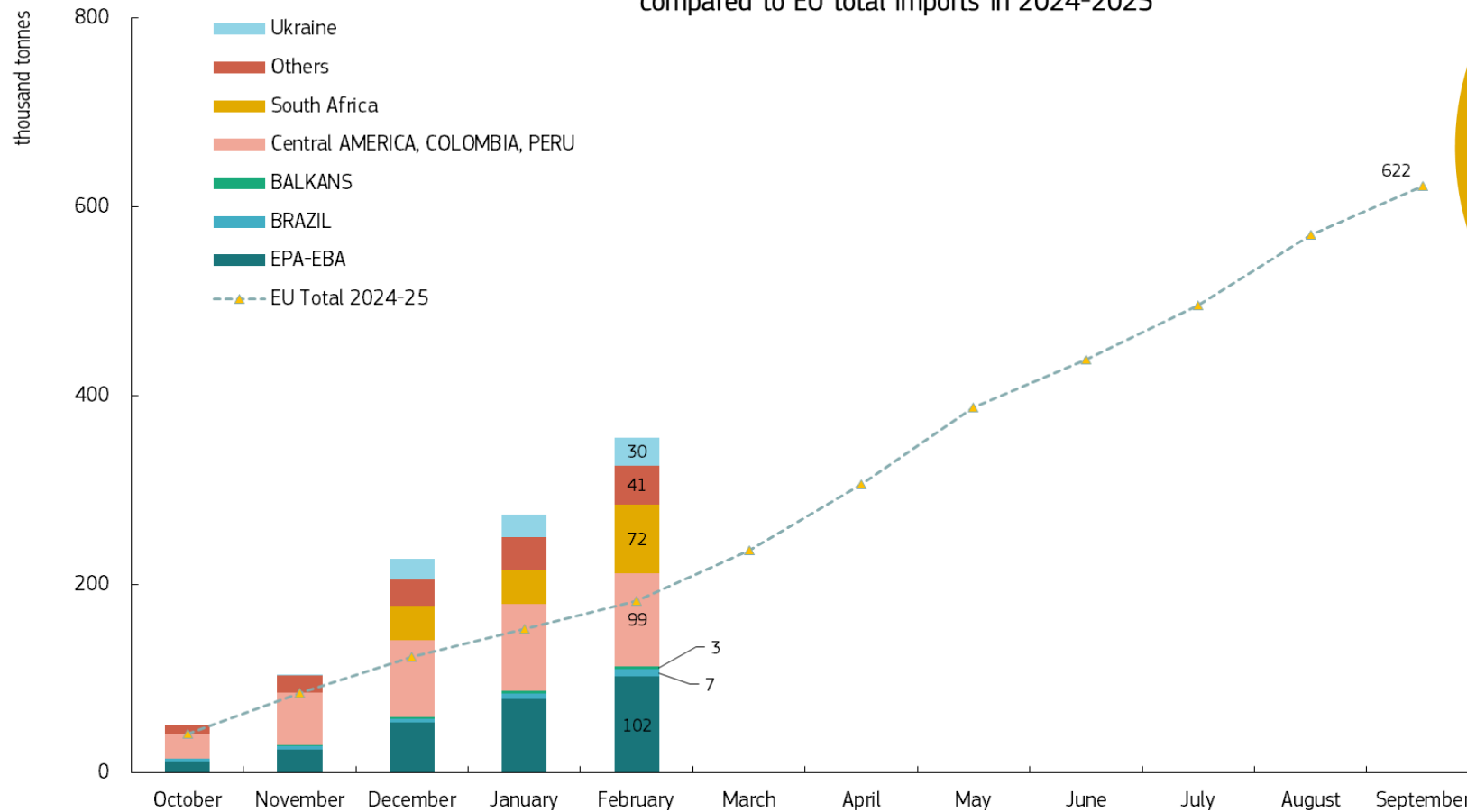


Source: EUROSTAT, Taxud

NOTE: trade figures under Normal regime
Source: TAXUD Surveillance and COMEXT.

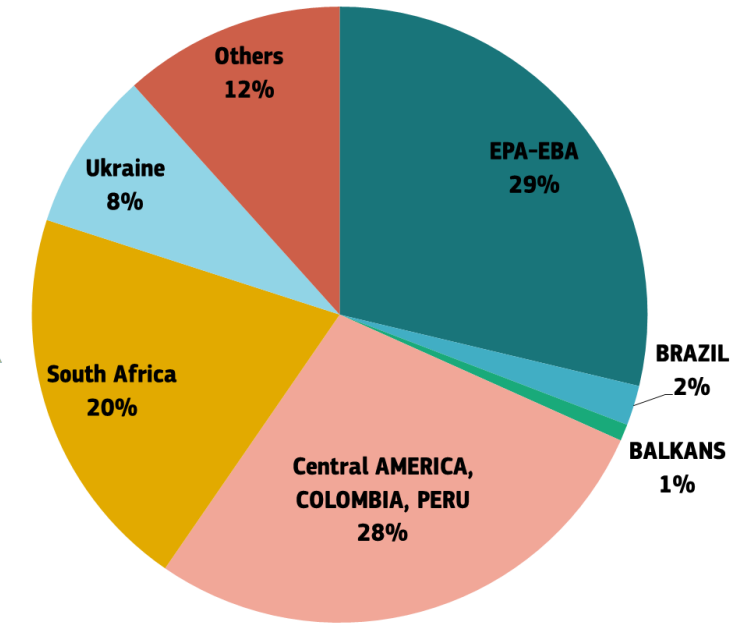
EU Total imports

EU Sugar main imports origins in 2025-2026
compared to EU total imports in 2024-2025



Source: EUROSTAT

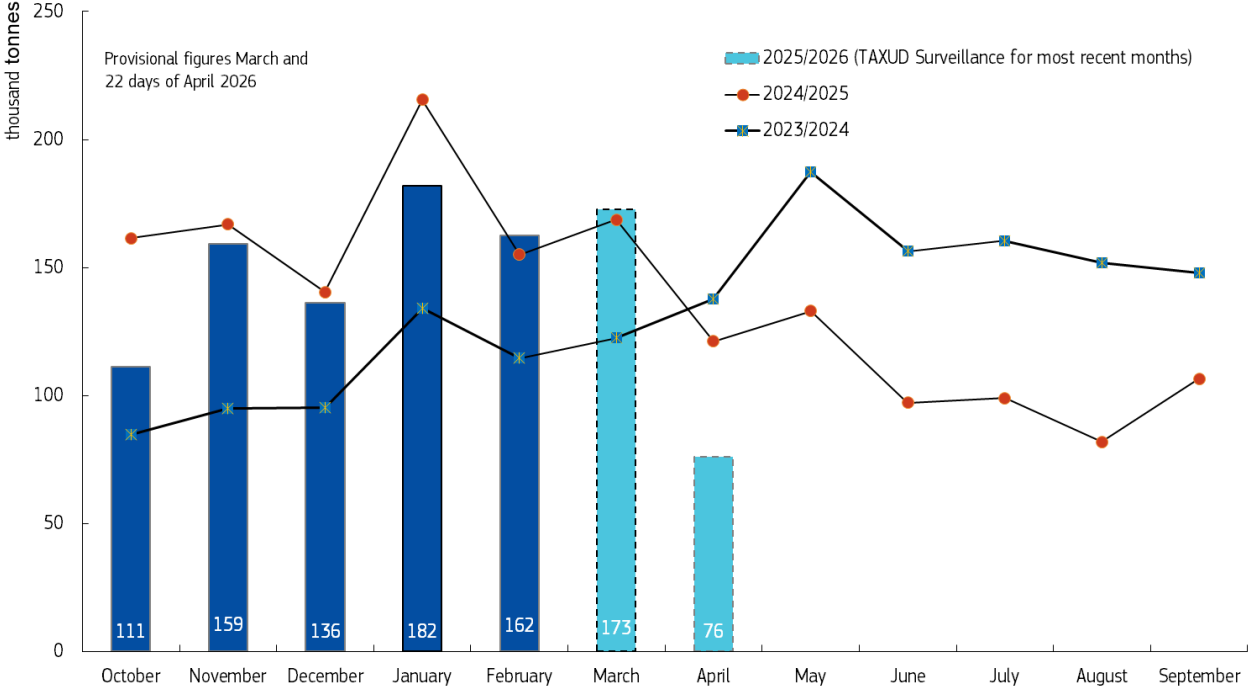
NOTE: trade figures under Normal regime
Source: COMEXT.



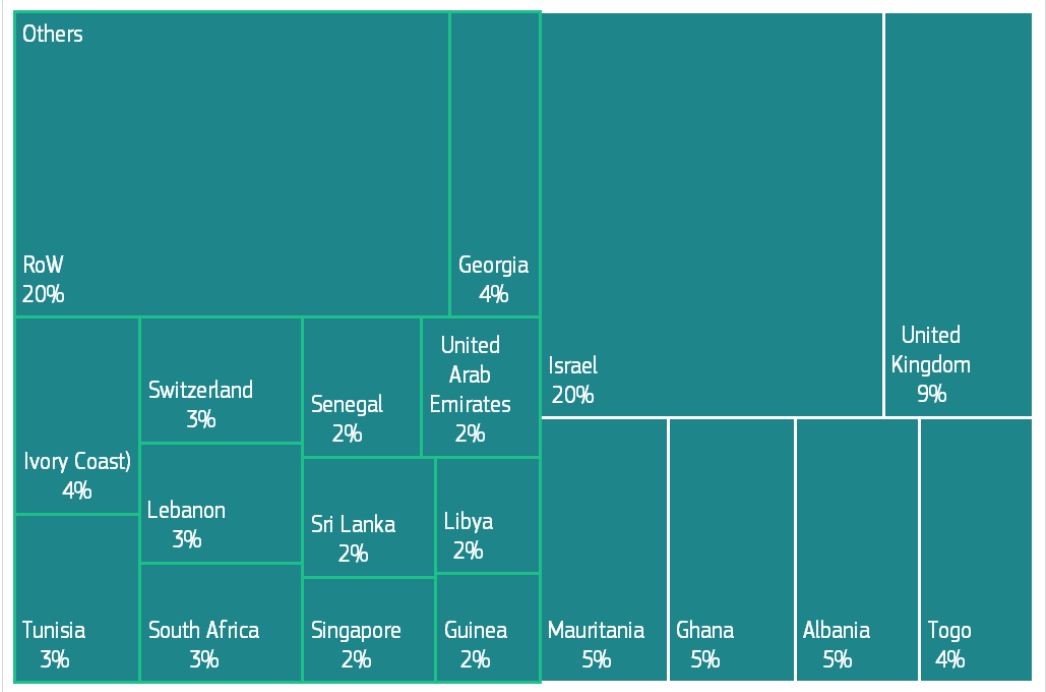
EU Sugar Exports

EU Total exports

EU Monthly sugar exports (CN 1701)



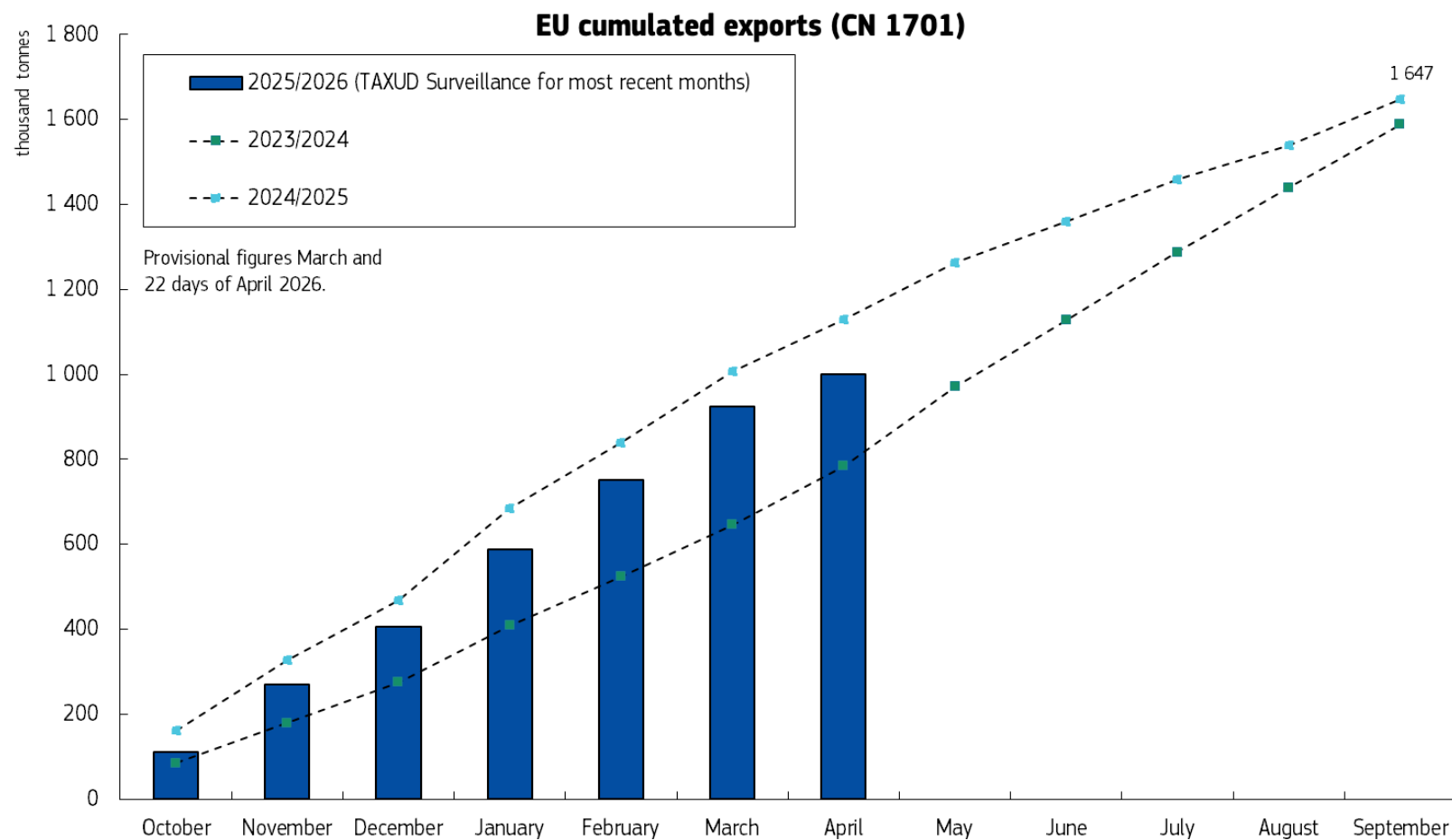
Source: EUROSTAT - DG TAXUD



EU exports (924 000 tonnes) by main destination
6 months MY 25/26
(COMEXT and TAXUD Surveillance)

Source: TAXUD Surveillance and COMEXT.

EU Total exports

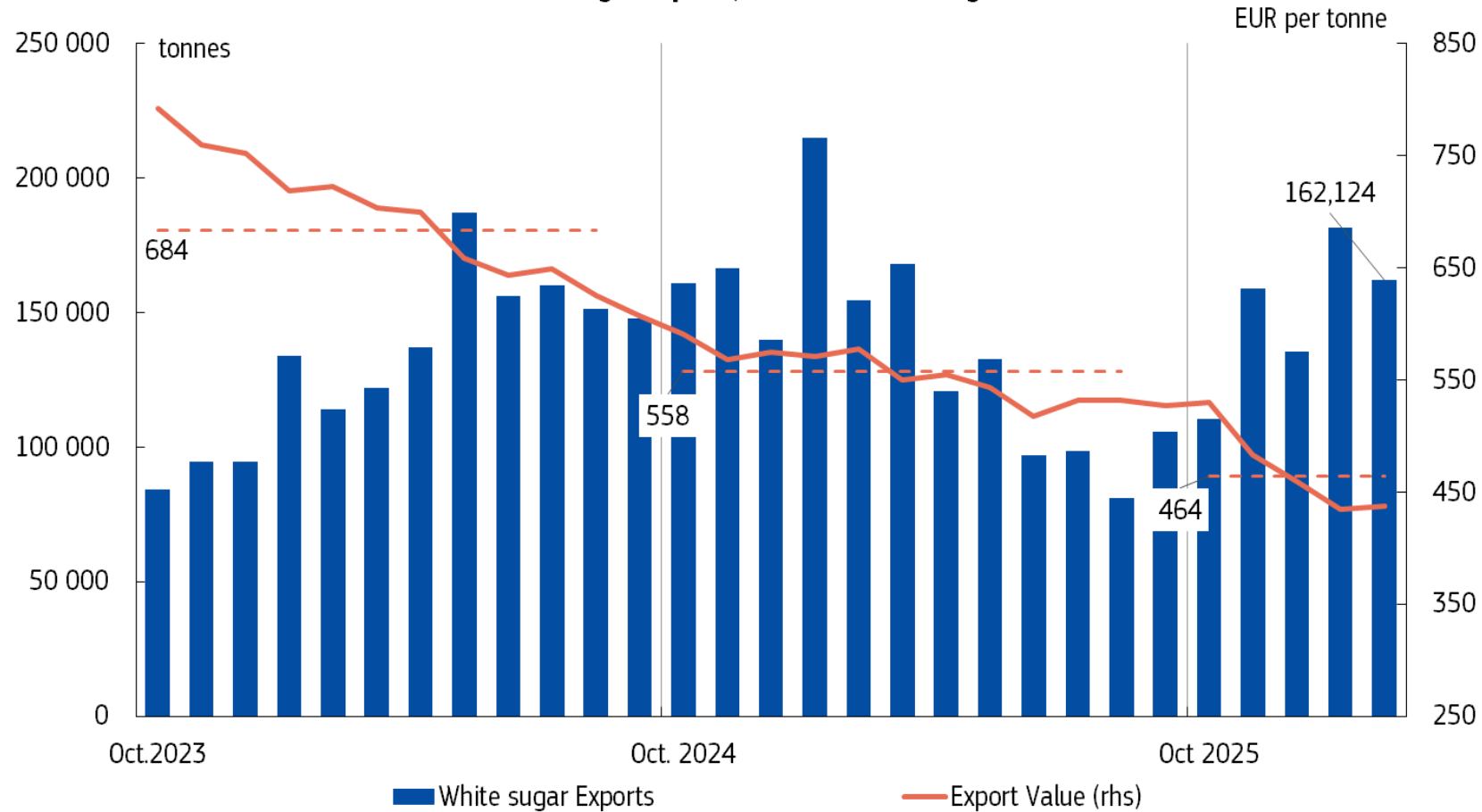


Source: EUROSTAT- DG TAXUD

NOTE: trade figures under Normal regime
Source: TAXUD Surveillance and COMEXT.

EU White sugar exports

EU white sugar exports, volume and average FOB value

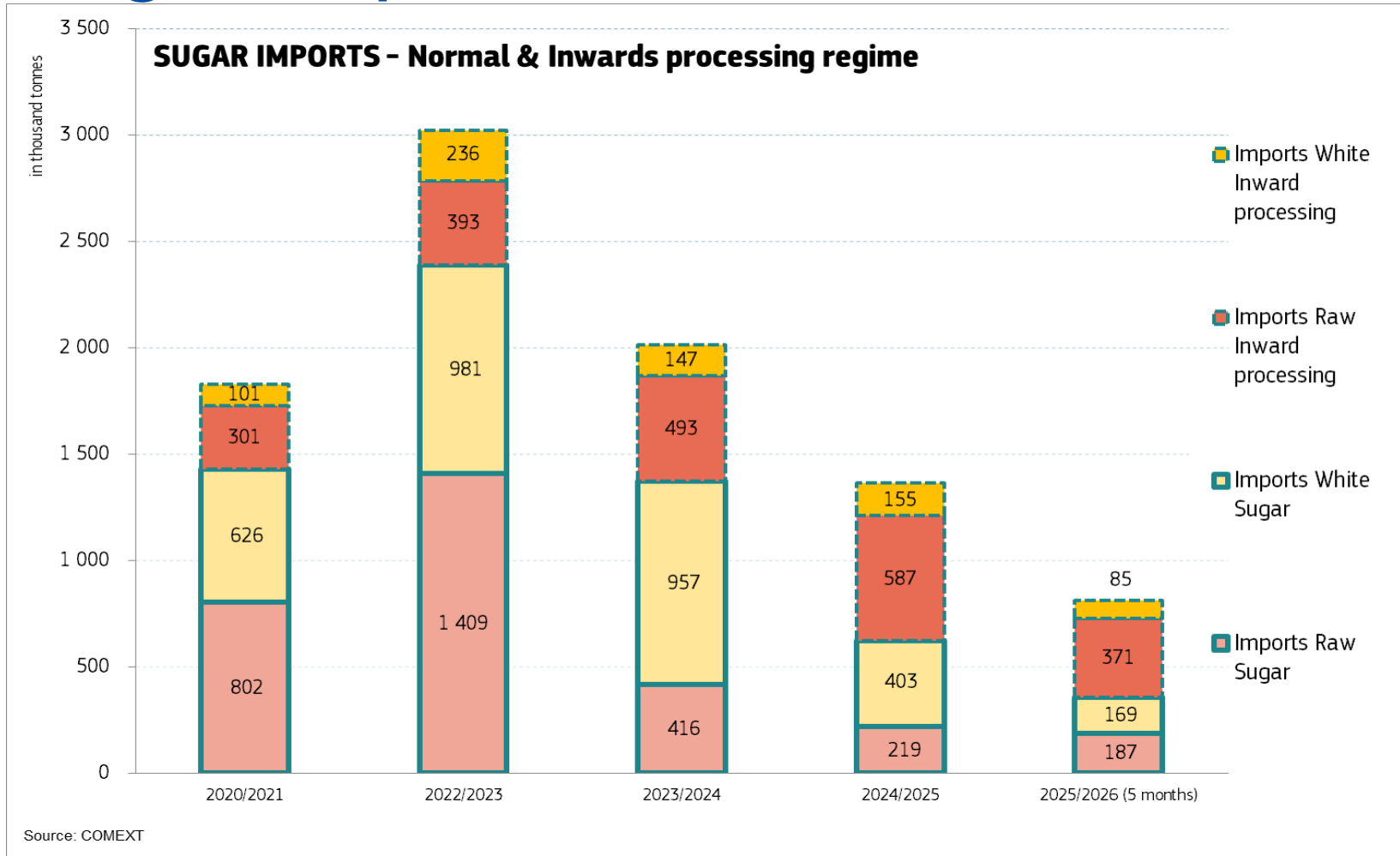


Source: EUROSTAT.

NOTE: trade figures under Normal regime
Source: COMEXT.

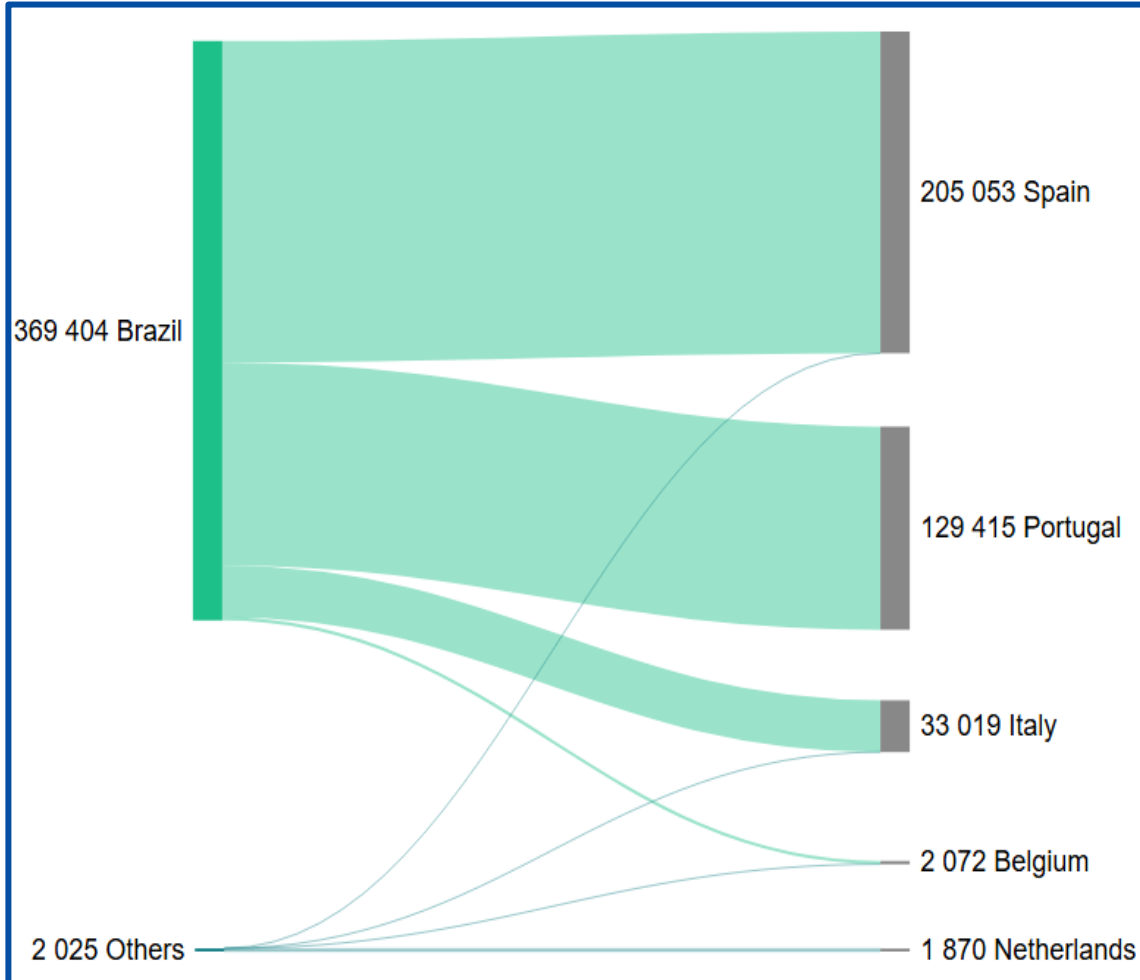
EU Sugar Trade – Inward processing regime

Sugar imports - CN1701

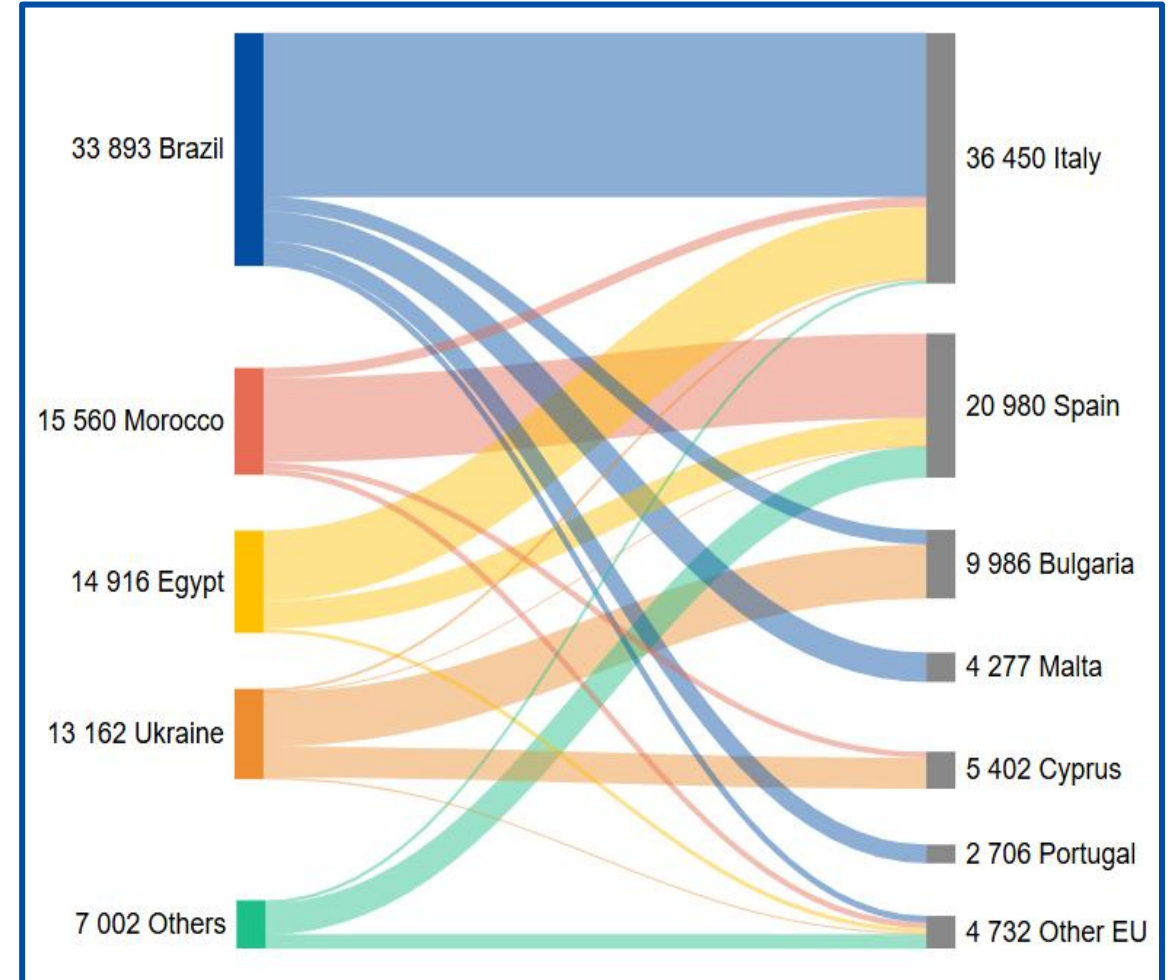


EU imports under inward processing (IP)

Origin and destination of EU raw sugar imports IP (5 months 2025/26)

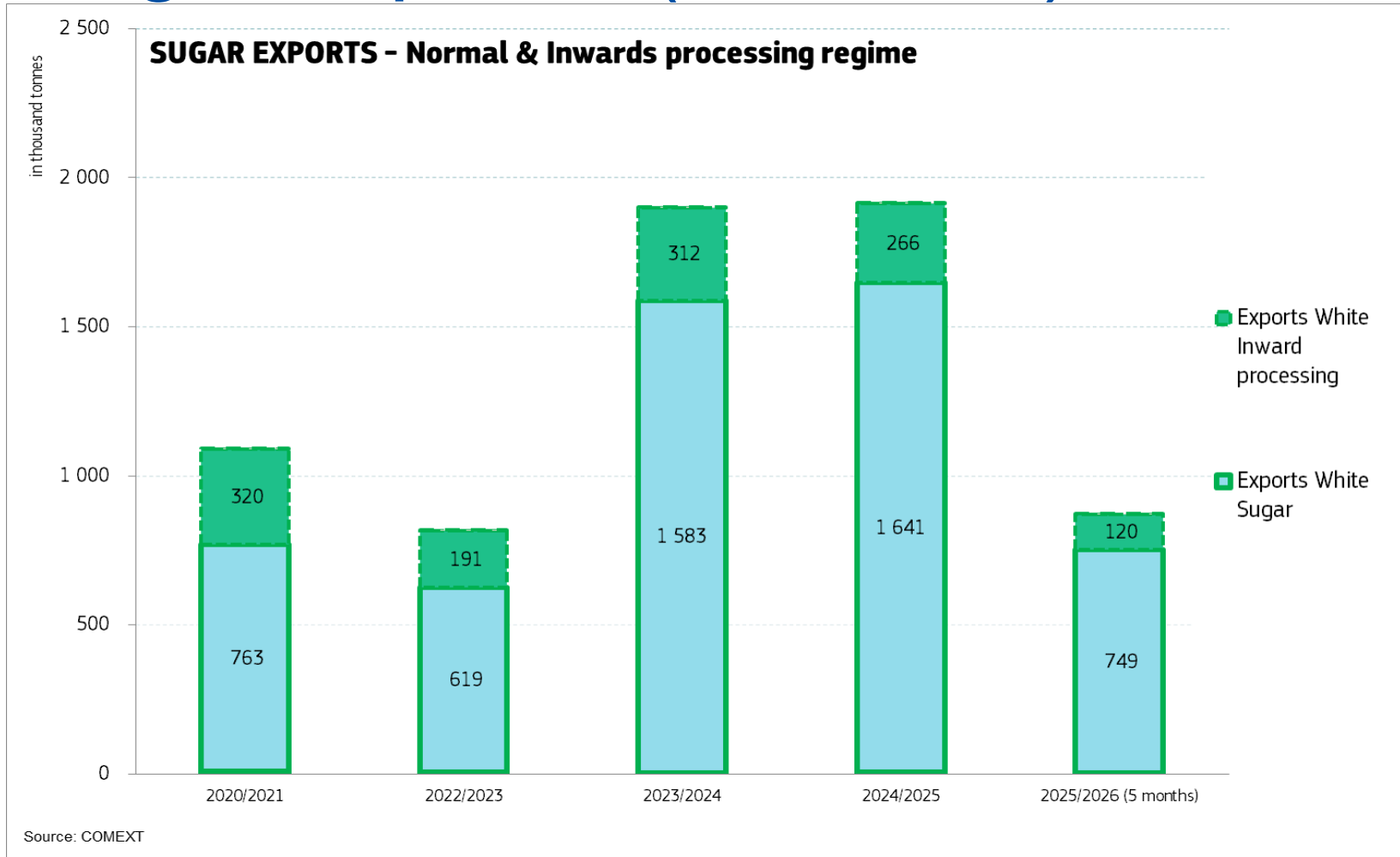


Origin and destination of EU white sugar imports IP (5 months 2025/26)



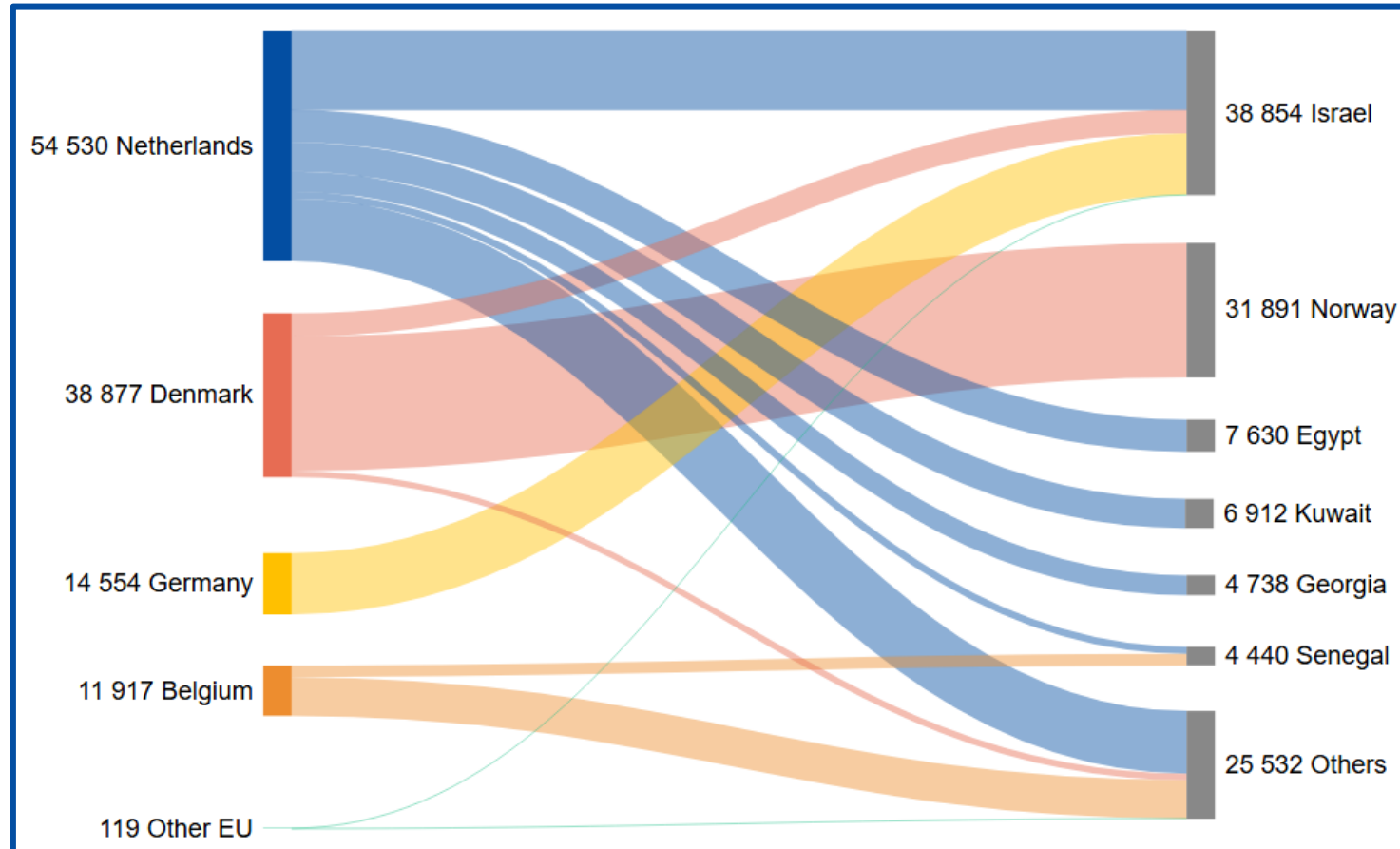
Source: Comext

Sugar exports- (CN 1701)



EU exports under inward processing- White sugar

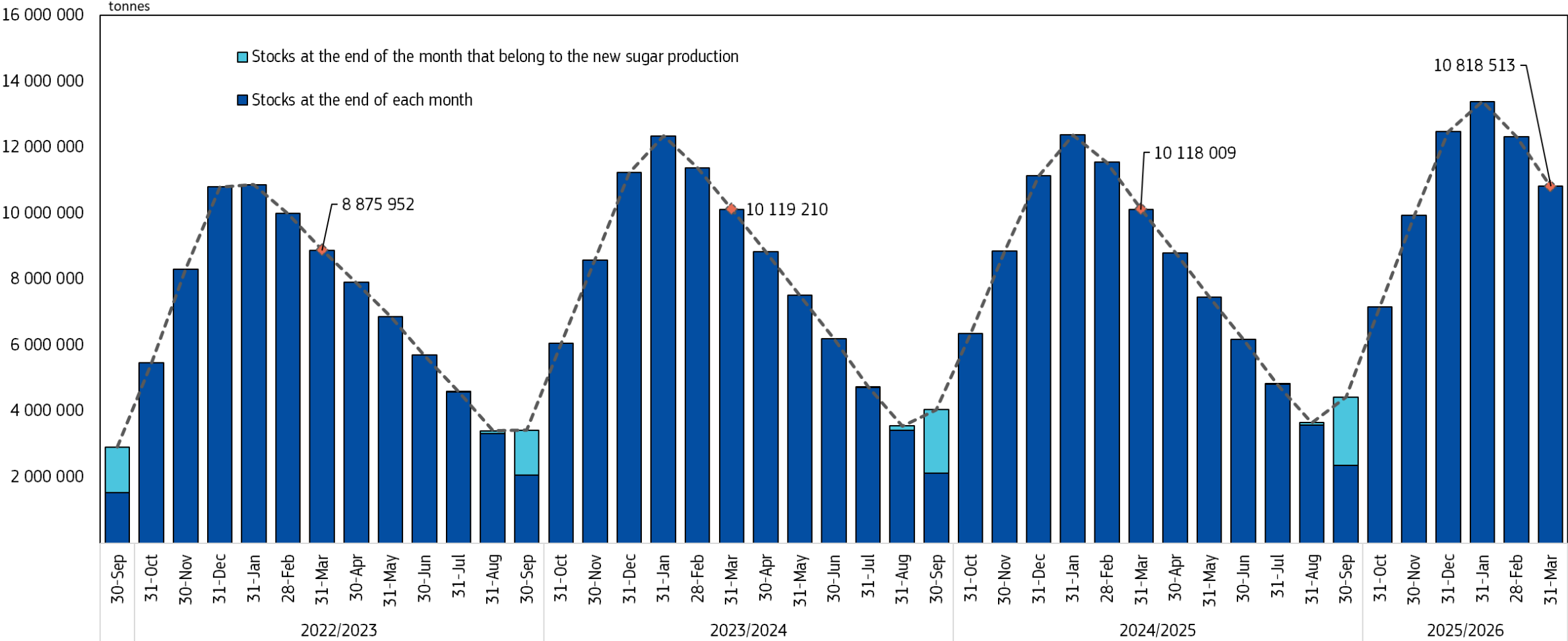
Origin and destination of EU white sugar IP exports (5 months 2025/26)



EU Sugar stocks

EU Sugar stocks

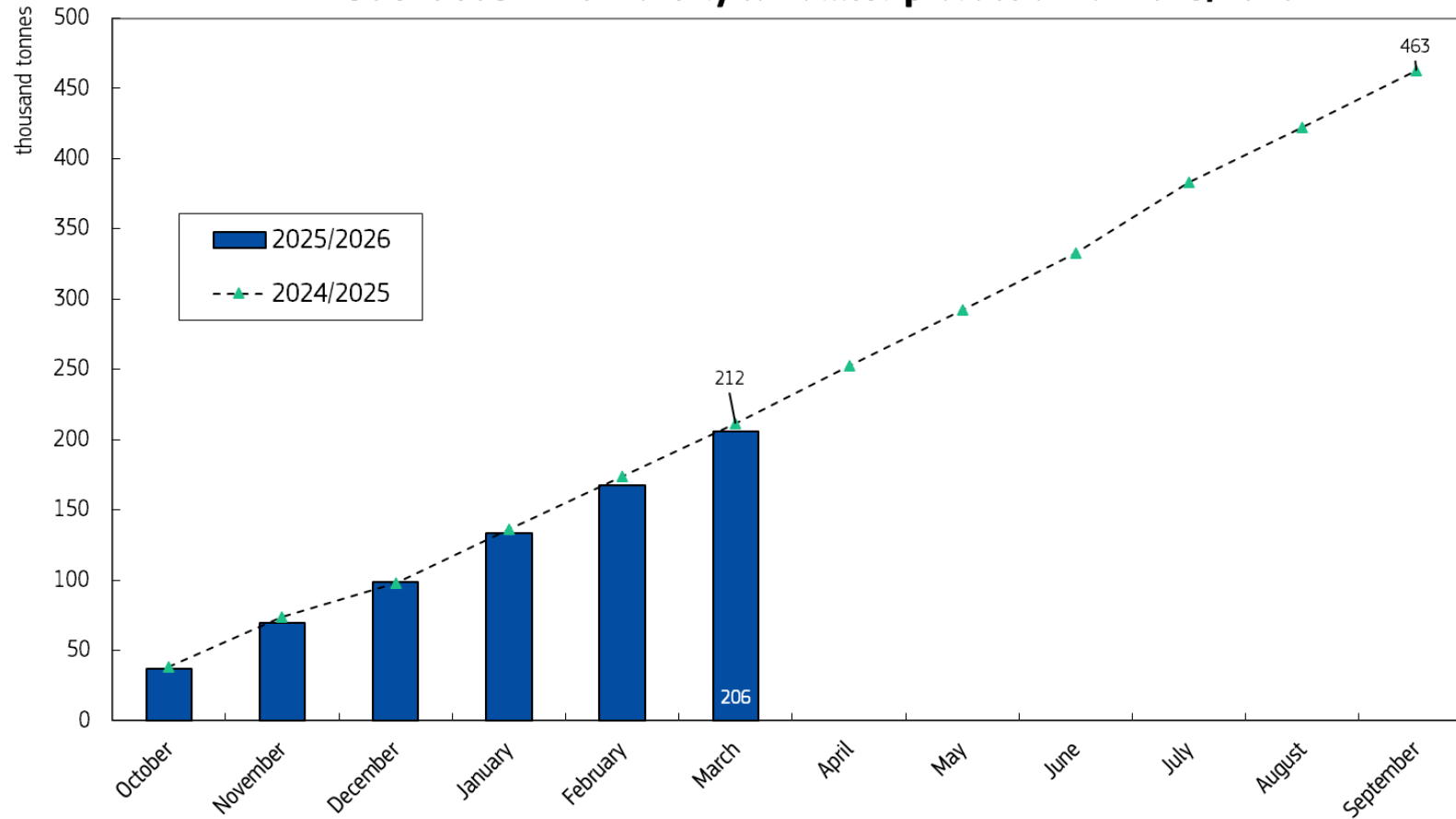
EU sugar stocks



EU Isoglucose

EU Isoglucose production

ISOGLUCOSE - EU monthly cumulated production for 2025/2026



Source: DG AGRI.

Balance sheet

Estimates 2025/26

Area and sugar production

Estimates MY 2025/26

Marketing year 2025/26 (Oct-Sep) <i>upd April 2026</i>		SUGAR			ISOGLUCOSE
		Areas (1000 ha)	Yield (t/ha)	Production (in tonnes wse)	Production (in tonnes wse)
Region 1		459	10.2	4695328	
of which:	CZ	56	10.5	589 474	
	PL	259	9.9	2 575 832	
Region 2		824	13.7	11 429 449	
of which:	DE	345	13.0	4 482 672	
	FR (Met.)	344	13.8	4 737 279	
	FR (Dom.)			124 923	
Region 3		72	6.6	475 096	
TOTAL		1 355	12. 2	16 599 872	463 000

Sugar production- Estimates reported by MS or latest estimates available.
 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

Estimates for MY 2025/26

(in 1000 tonnes wse) <i>Latest update Apr 2026</i>	Final 2022/23 (Oct-Sep)		Final 2023/24 (Oct-Sep)		Final 2024/25 (Oct-Sep)		Estimates 2025/26 (Oct-Sep)	
	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose
Beginning stocks	1 519	15	2 068	19	2 115	24	2 302	17
Production	14 604	433	15 558	496	16 565	463	16 600	463
Imports	3 119	4	2 121	3	1 454	2	1 530	2
as such	2 348		1 303		616		700	
in processed products	771		819		838		830	
Total availabilities	19 243	452	19 747	518	20 133	489	20 431	482
Consumption/disappearance	14 008	384	13 564	448	13 614	424	13 800	422
of which industrial use	1 090		447		521		750	
of which bioethanol	713		752		934		950	
other	12 204		12 364		12 159		12 100	
Exports	3 167	48	4 069	46	4 218	48	4 000	45
as such	625		1 588		1 647		1 450	
in processed products	2 542		2 481		2 571		2 550	
Ending stocks	2 068	19	2 115	24	2 301	17	2 631	15
Total outlets	19 243	452	19 747	518	20 133	489	20 431	482

Sugar production: For MY 2025/26 sugar production estimates provided by MS or latest estimates available.

Source: DG Agri, COMEXT

Thank you