

Sugar Market situation

AGRI E 4 - Civil Dialogue Group – Arable Crops Sugar sector

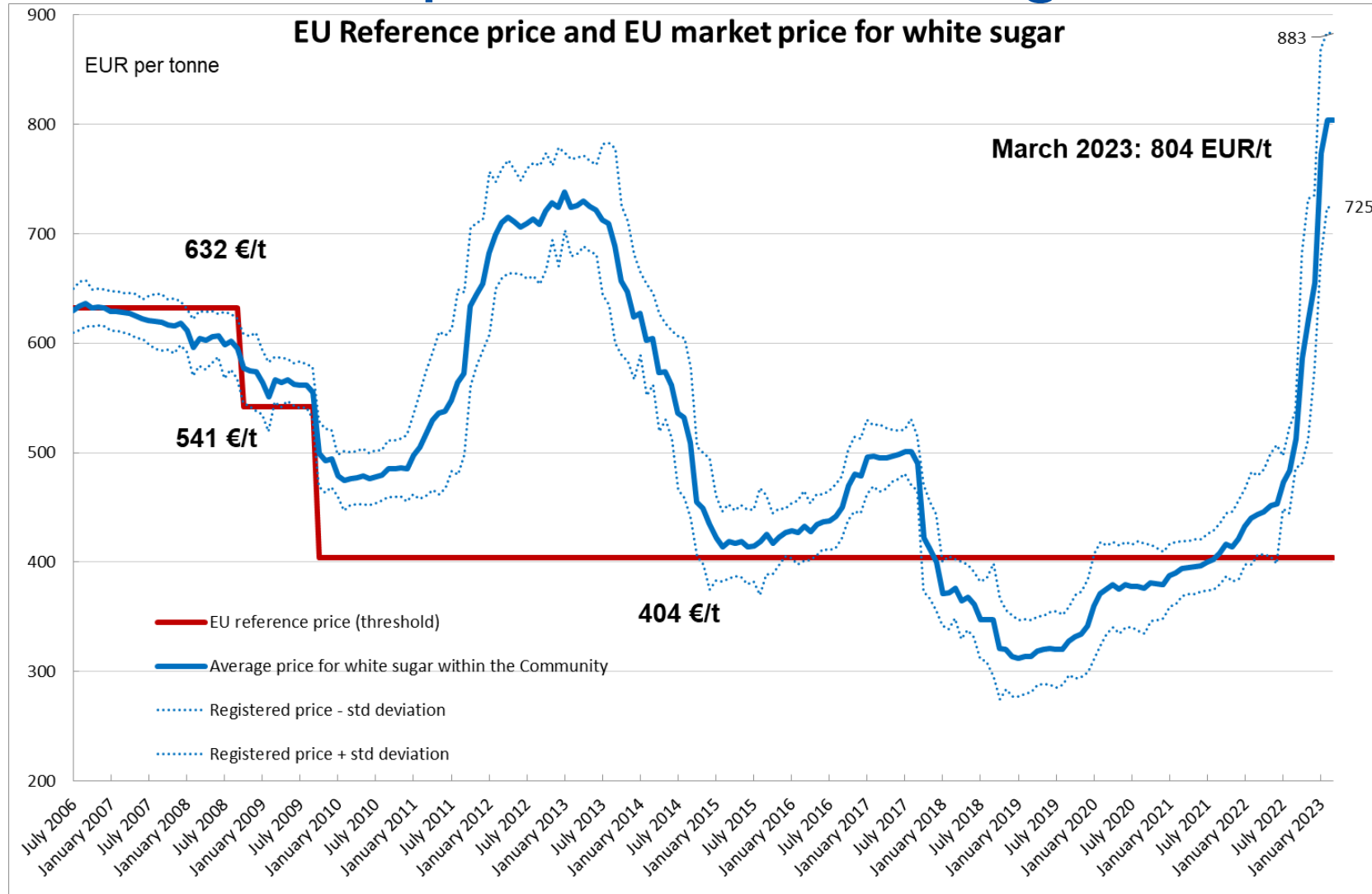
02 May 2023

Sugar Price reporting

AGRI E 4 - Civil Dialogue Group – Arable Crops Sugar sector

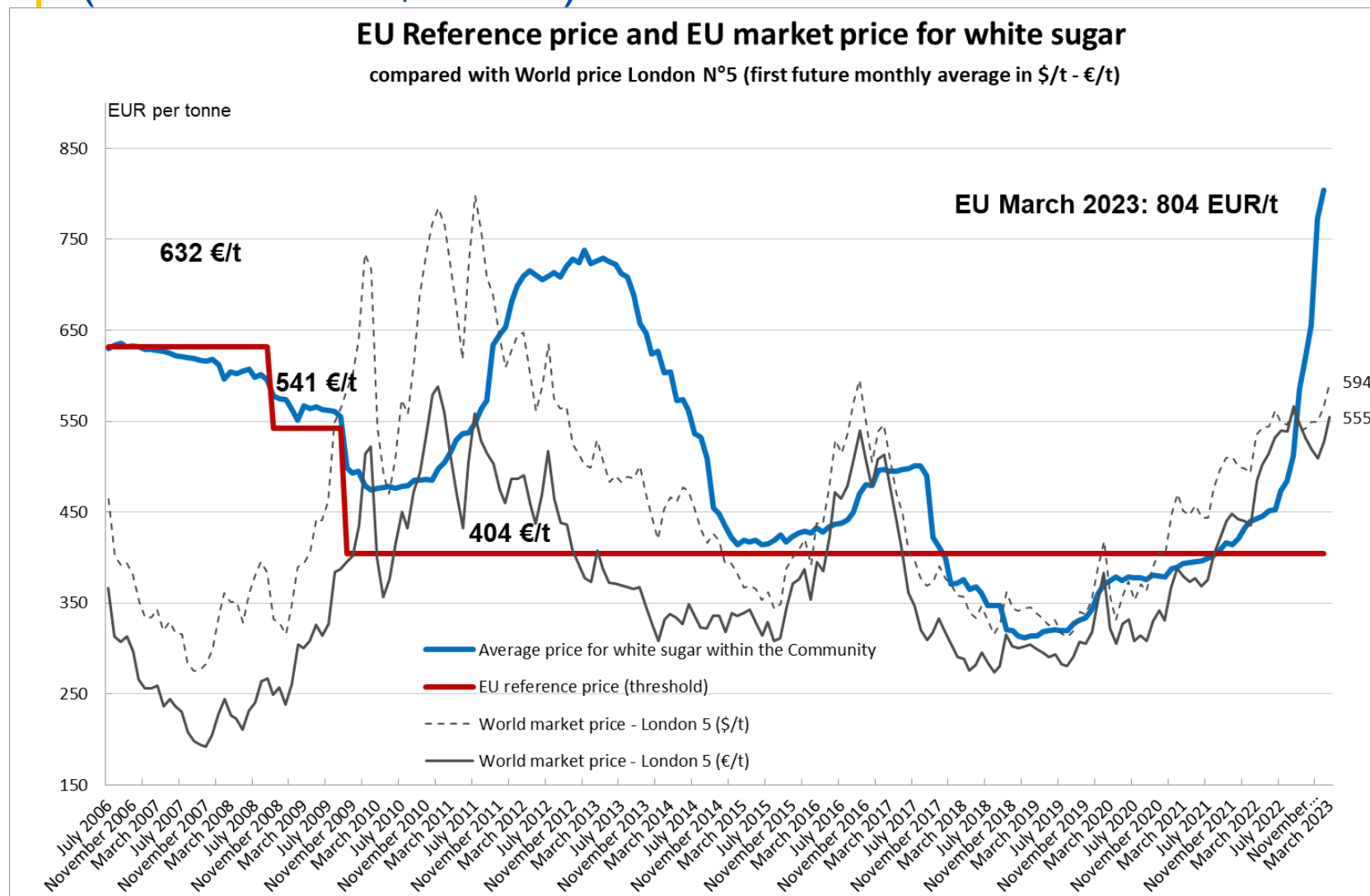
02 May 2023

EU market price for white sugar



- Increase by EUR 361 per tonne compared to March 2022.

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



London N°5 (Mar. 2023):

- + EUR 27 per tonne compared to previous month (+5.1%)
- + EUR 70 per tonne compared to Mar. 2022(+%)

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 – 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)
March 2022	443	36	429	436	522
April 2022	446	39	440	436	526
May 2022	452	47	441	438	548
June 2022	453	54	446	438	561
July 2022	473	24	445	457	584
August 2022	484	39	467	462	623
September 2022	512	26	474	494	669
October 2022	586	96	595	560	711
November 2022	622	110	623	588	815
December 2022	655	80	665	624	845
January 2023	773	96	774	757	873
February 2023	804	80	802	788	894
March 2023	804	79	802	792	877

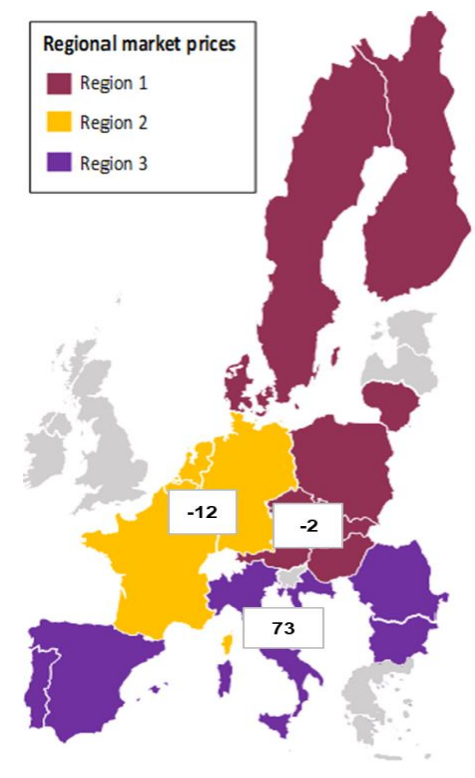
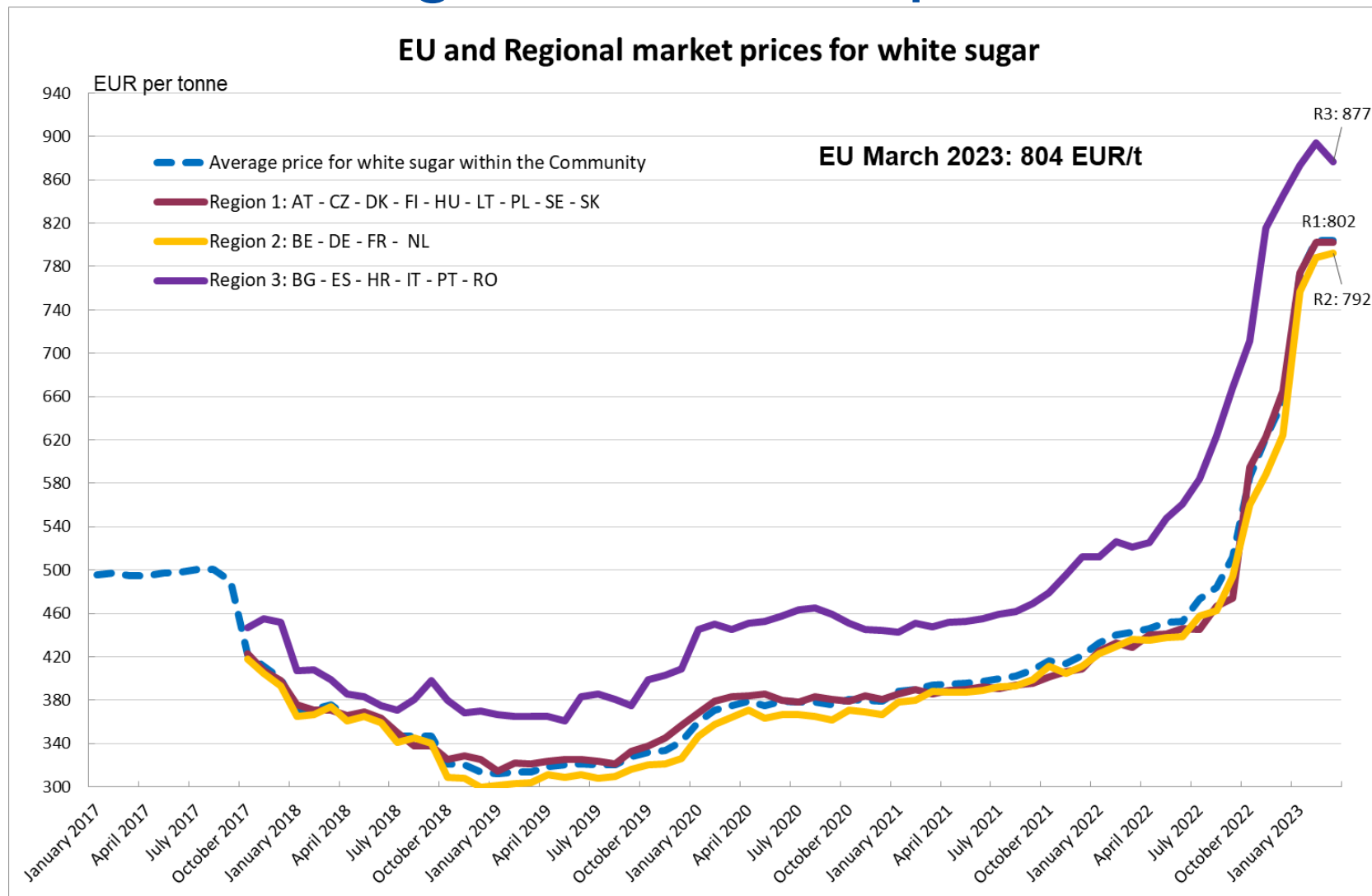
(1) Average weighted by quantities

(2) Standard deviation weighted by quantities

EU (EU27 + UK from Feb. 20 to Nov. 20)

- + 361 EUR/ tonne compared to previous year

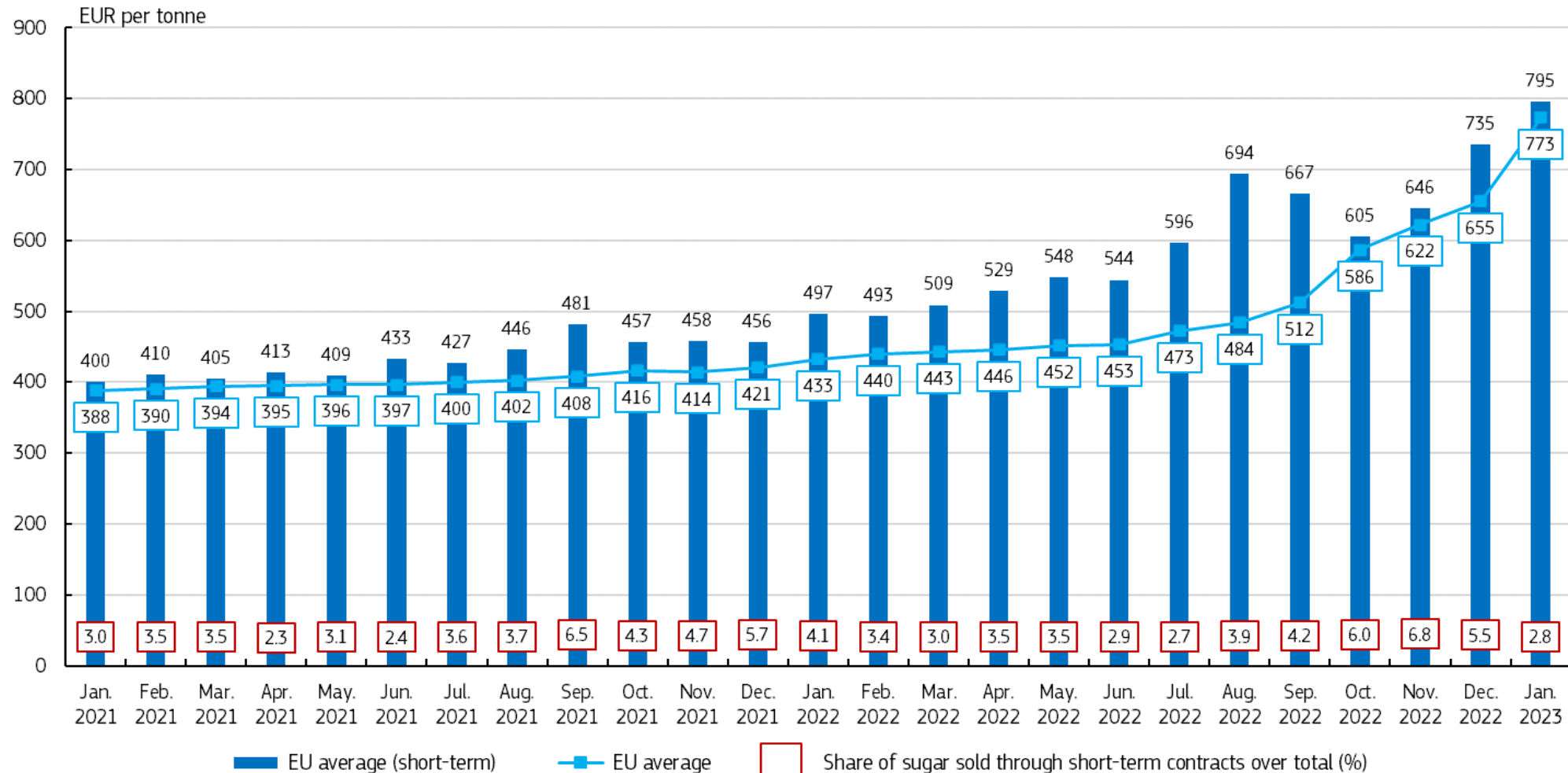
EU and Regional market prices for white sugar



Differences between EU average price and regional average prices

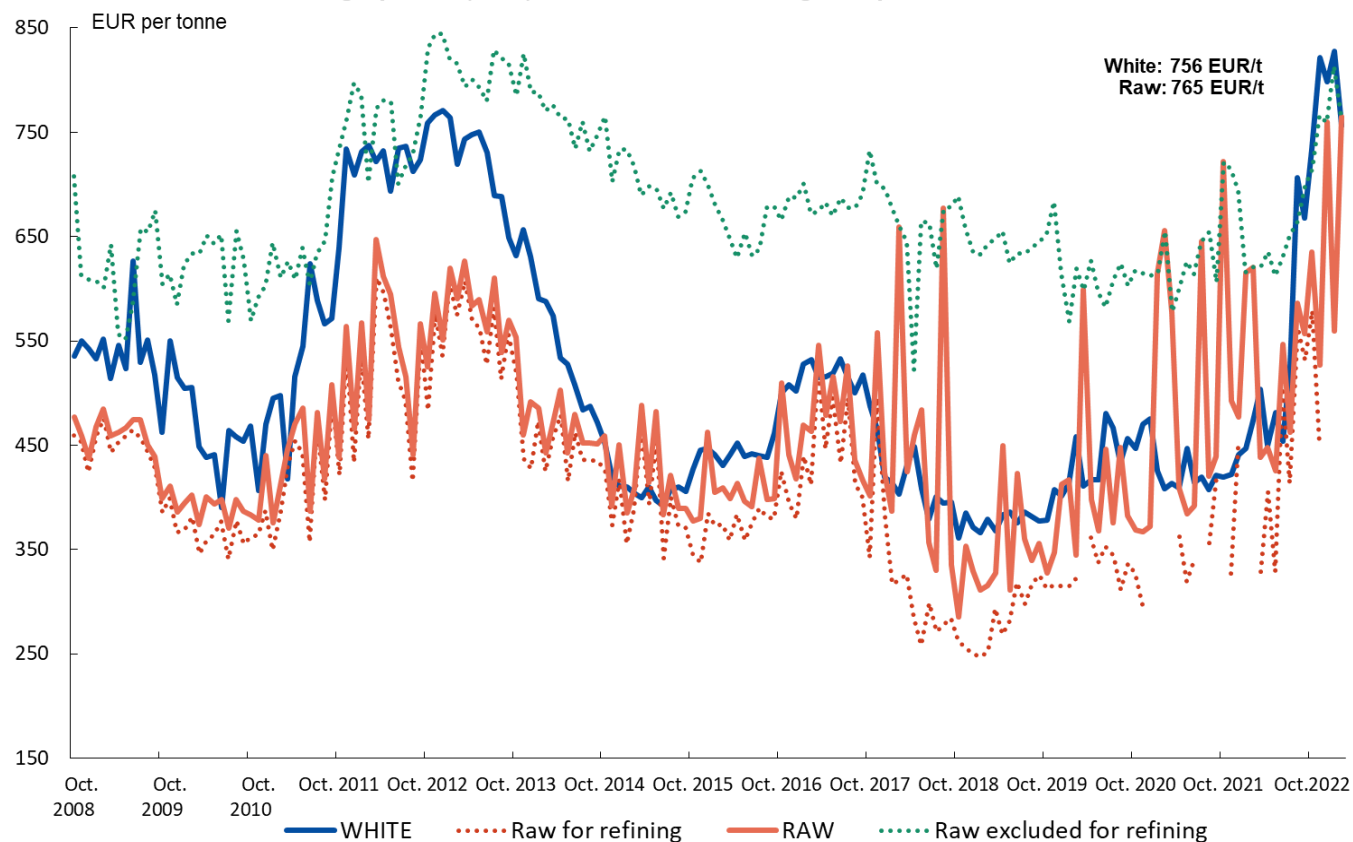
EU short-term prices

EU average prices, short-term and total

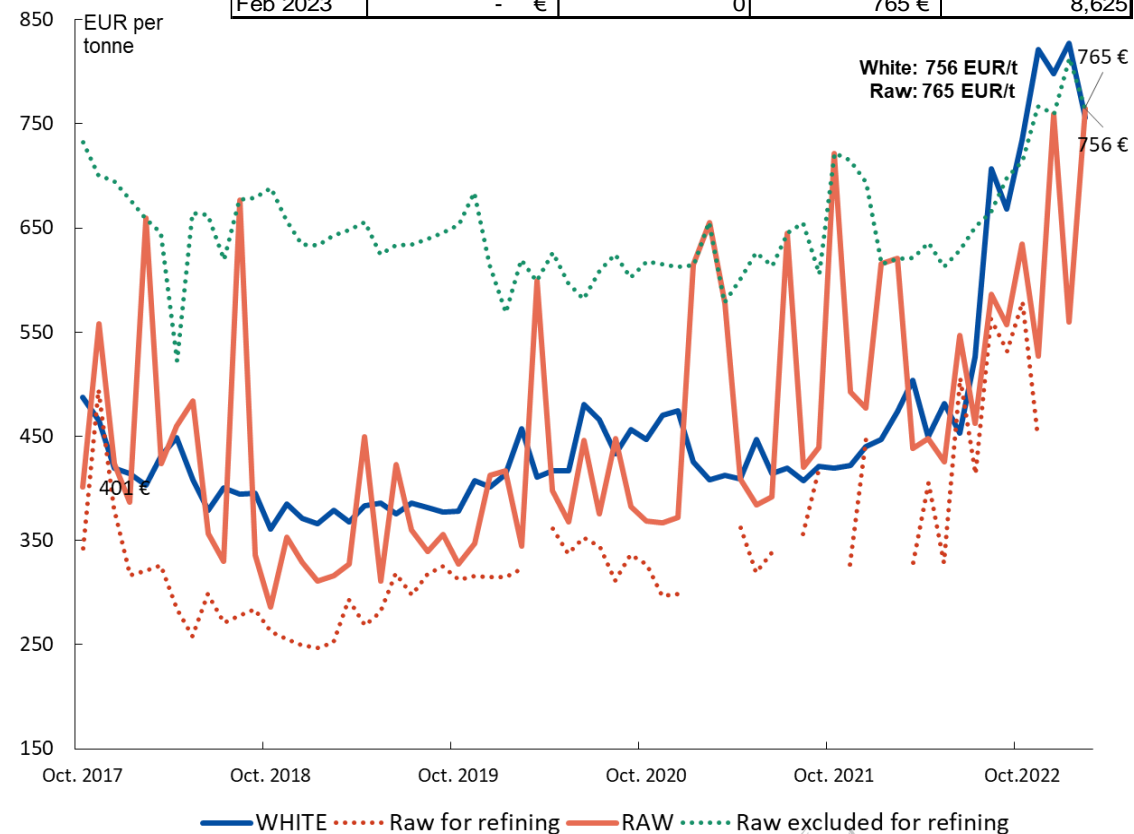


EPA / EBA average import price

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



Date	Raw for refining		Raw excluded for refining	
	(EUR/tonne)	tonnes	(EUR/tonne)	tonnes
Oct.2022	579 €	12,290	714 €	8,624
Nov 2022	450 €	36,391	767 €	11,776
Dec 2022	- €	0	760 €	11,723
Jan 2023	495 €	36,336	813 €	9,268
Feb 2023	- €	0	765 €	8,625

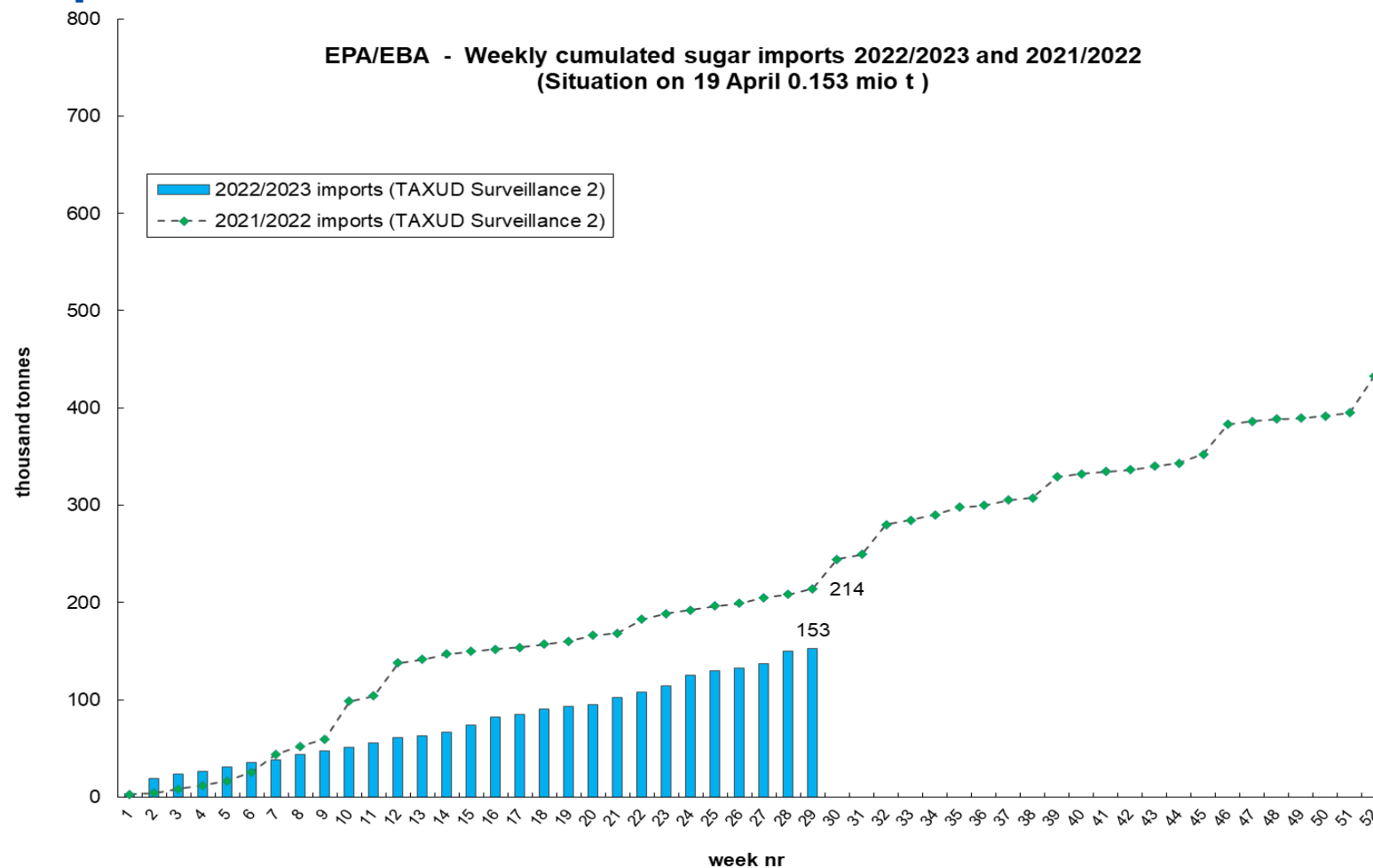


Sugar Trade statistics

AGRI E 4 - Civil Dialogue Group – Arable Crops Sugar sector

02 May 2023

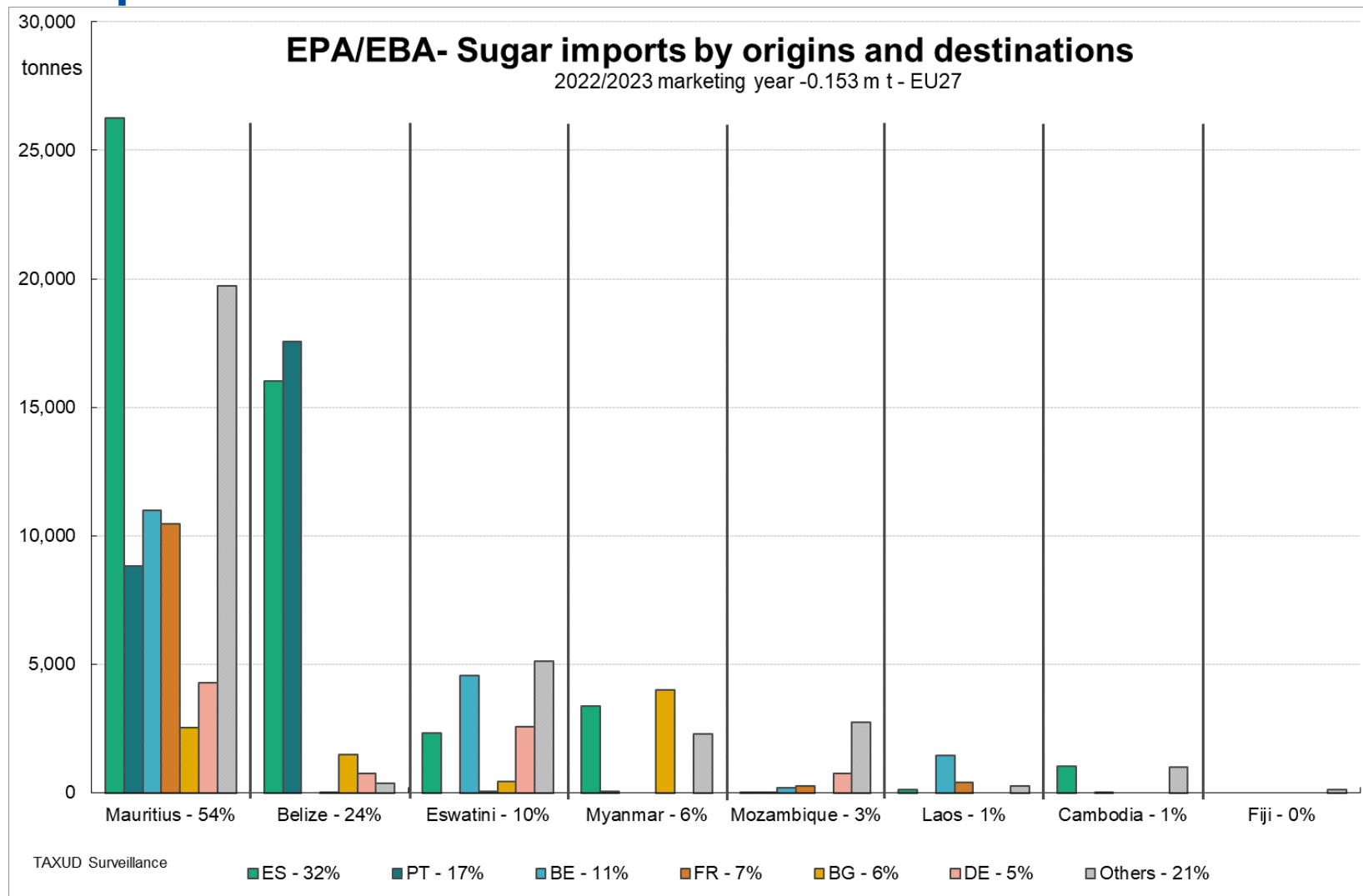
Imports EPA / EBA in 2022/2023 - a



Source: DG TAXUD - DG AGRI,

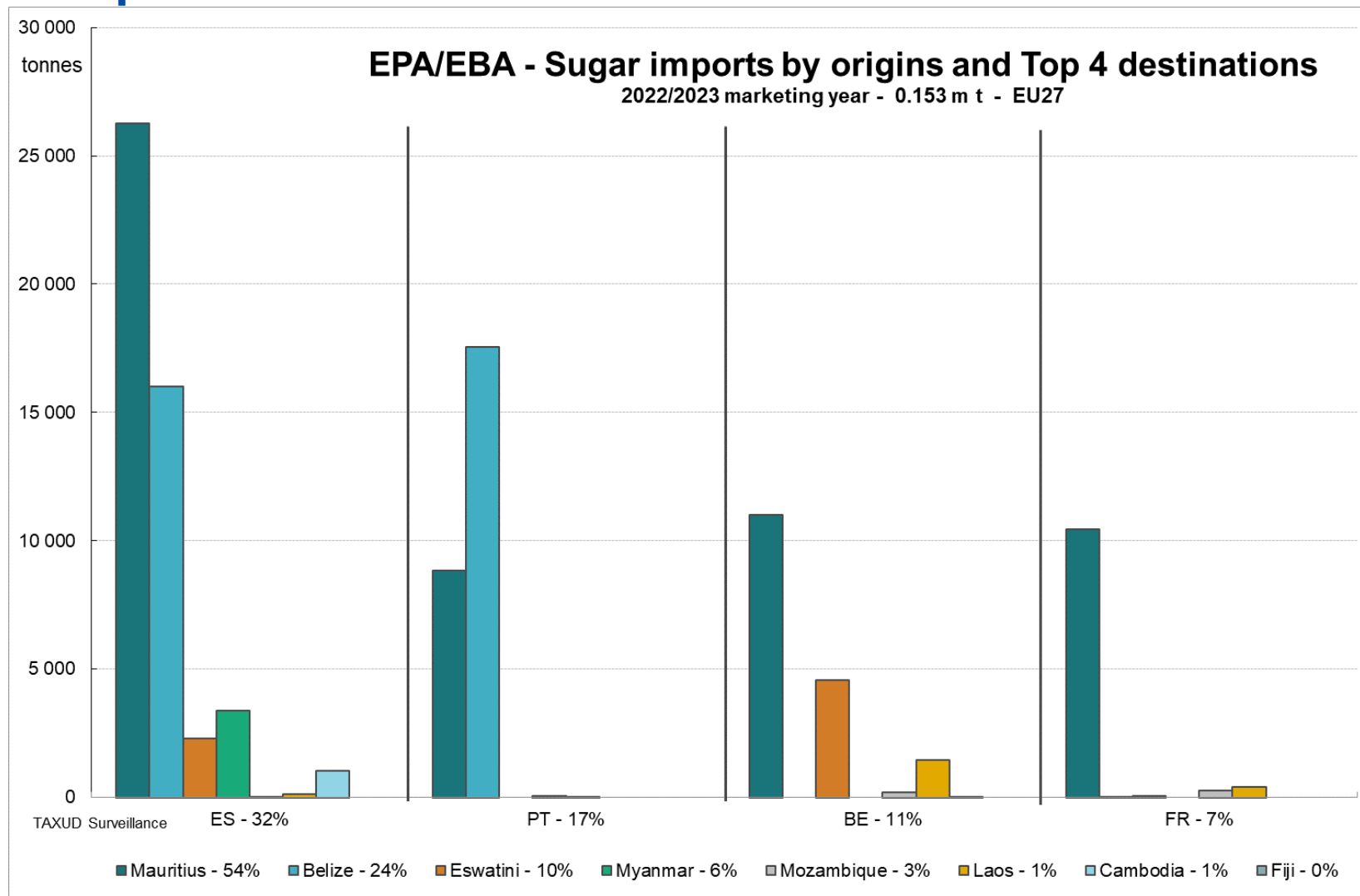
Substantial import data for Italy are missing

Imports EPA / EBA in 2022/2023 - a



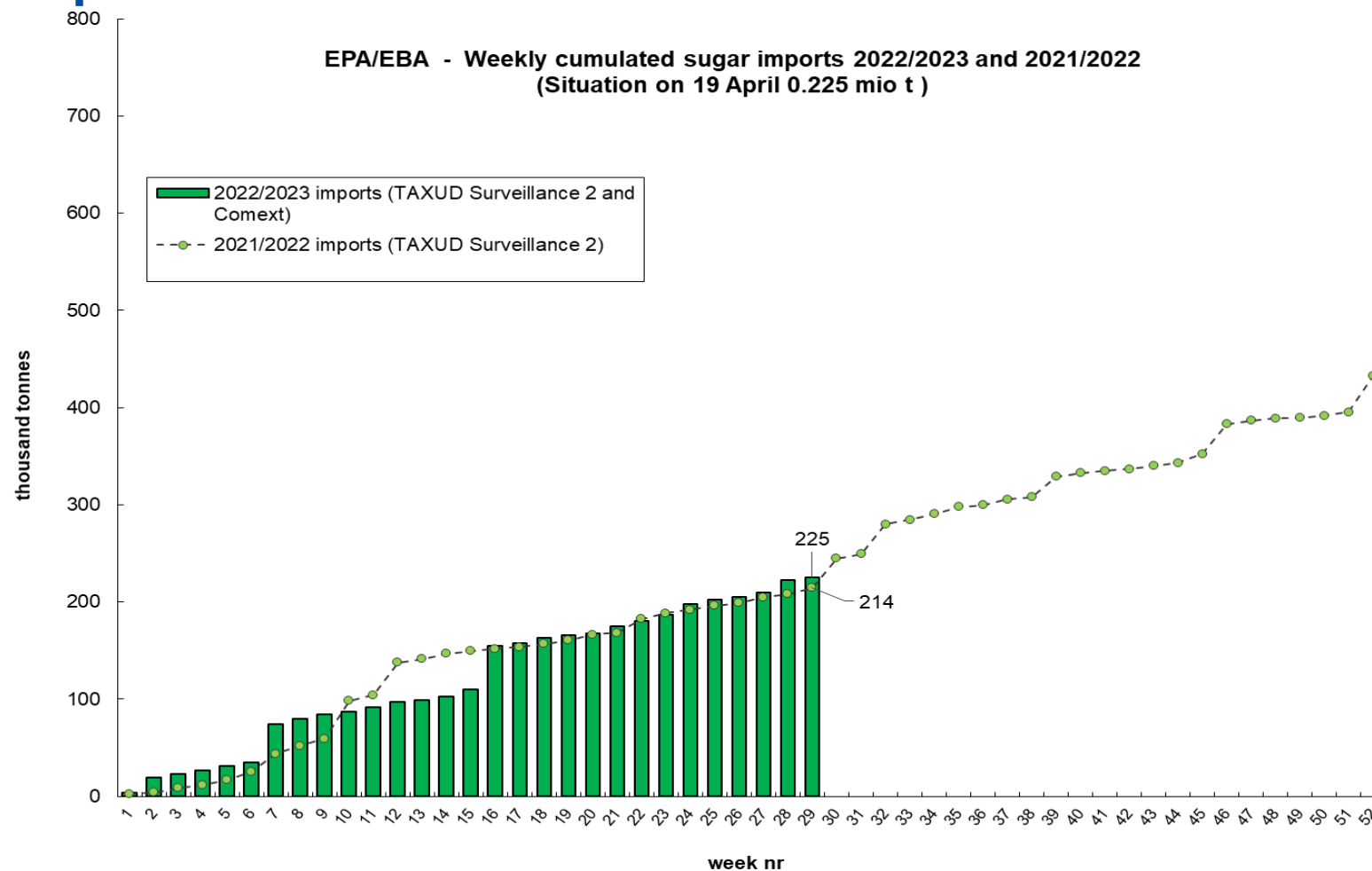
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Imports EPA / EBA in 2022/2023 - a



Substantial import data for Italy are missing

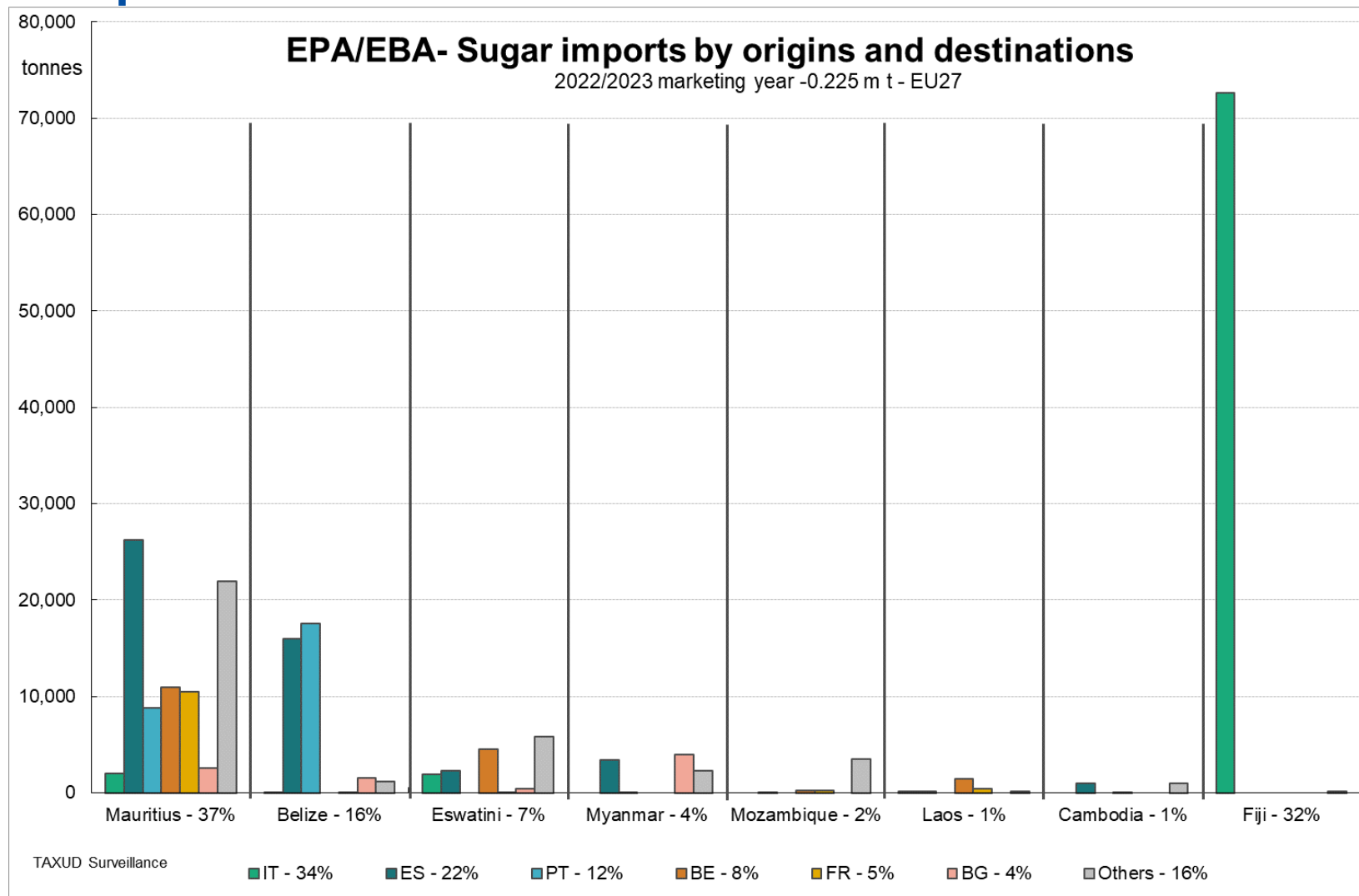
Imports EPA / EBA in 2022/2023 - b



Source: Comext- Taxud Surveillance

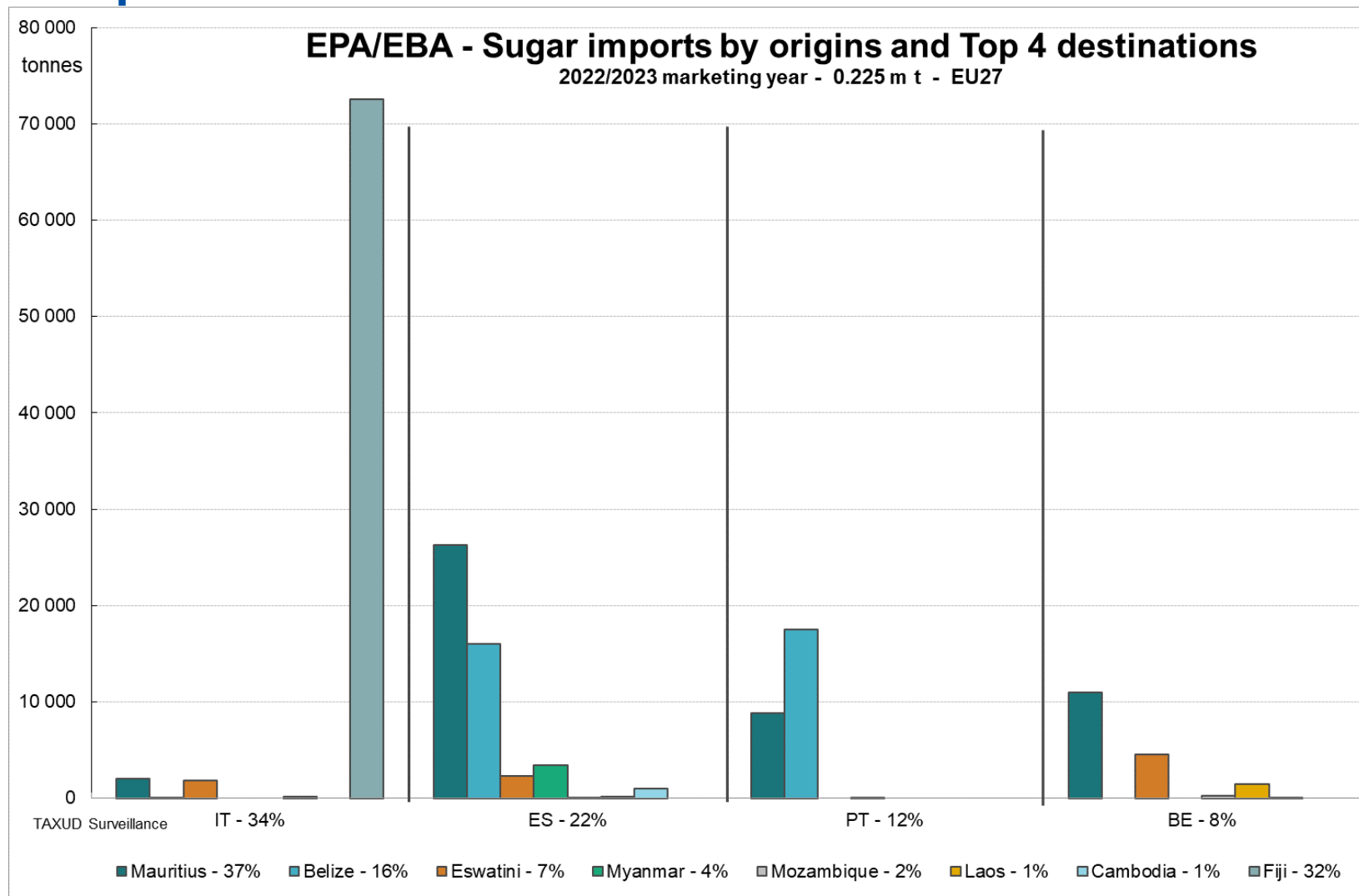
Including Italian import data from EPA/EBA-Fiji (source: COMEXT) recorded in Nov.22 and Jan. 23

Imports EPA / EBA in 2022/2023 - b



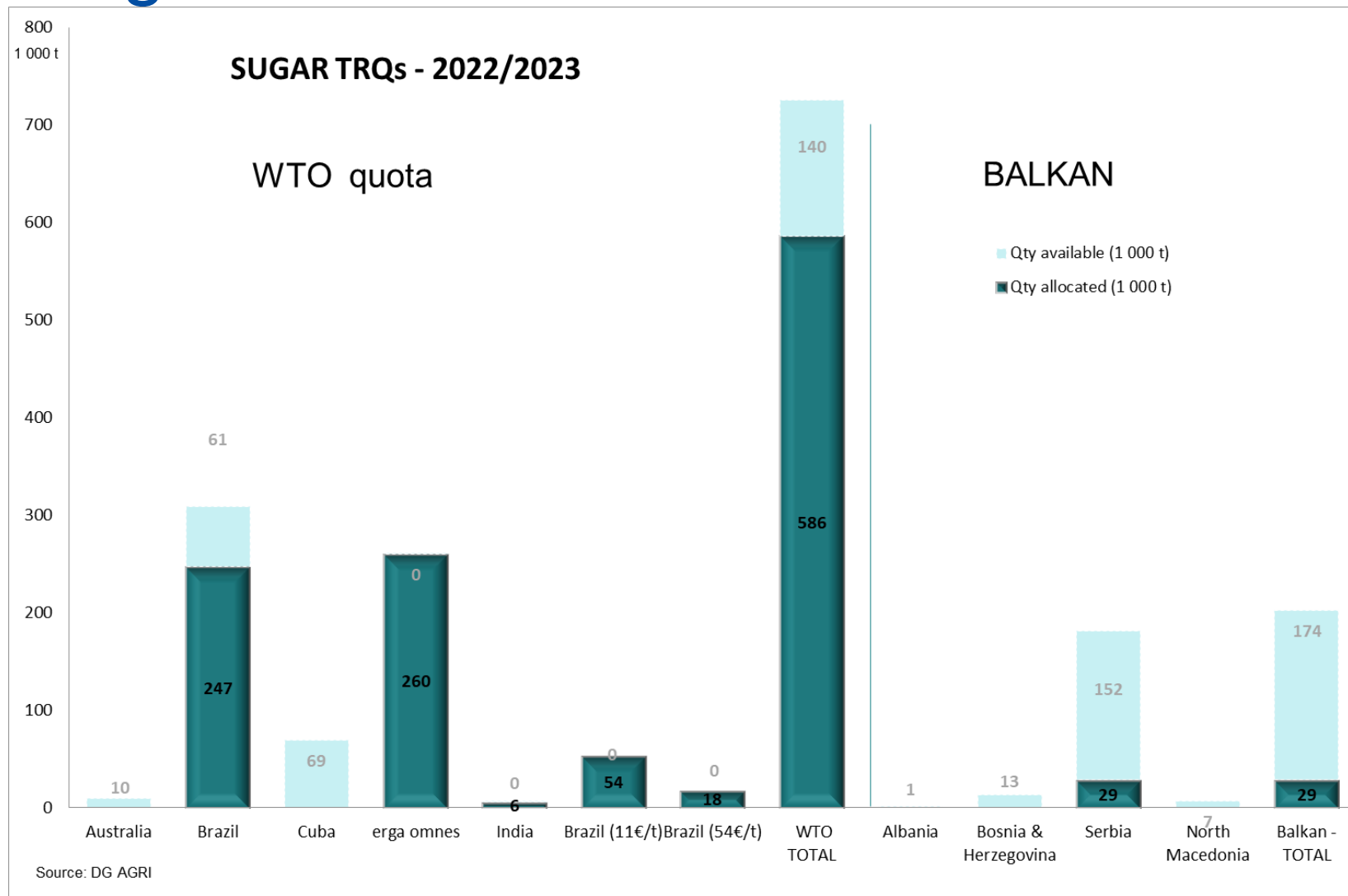
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Imports EPA / EBA in 2022/2023 - b

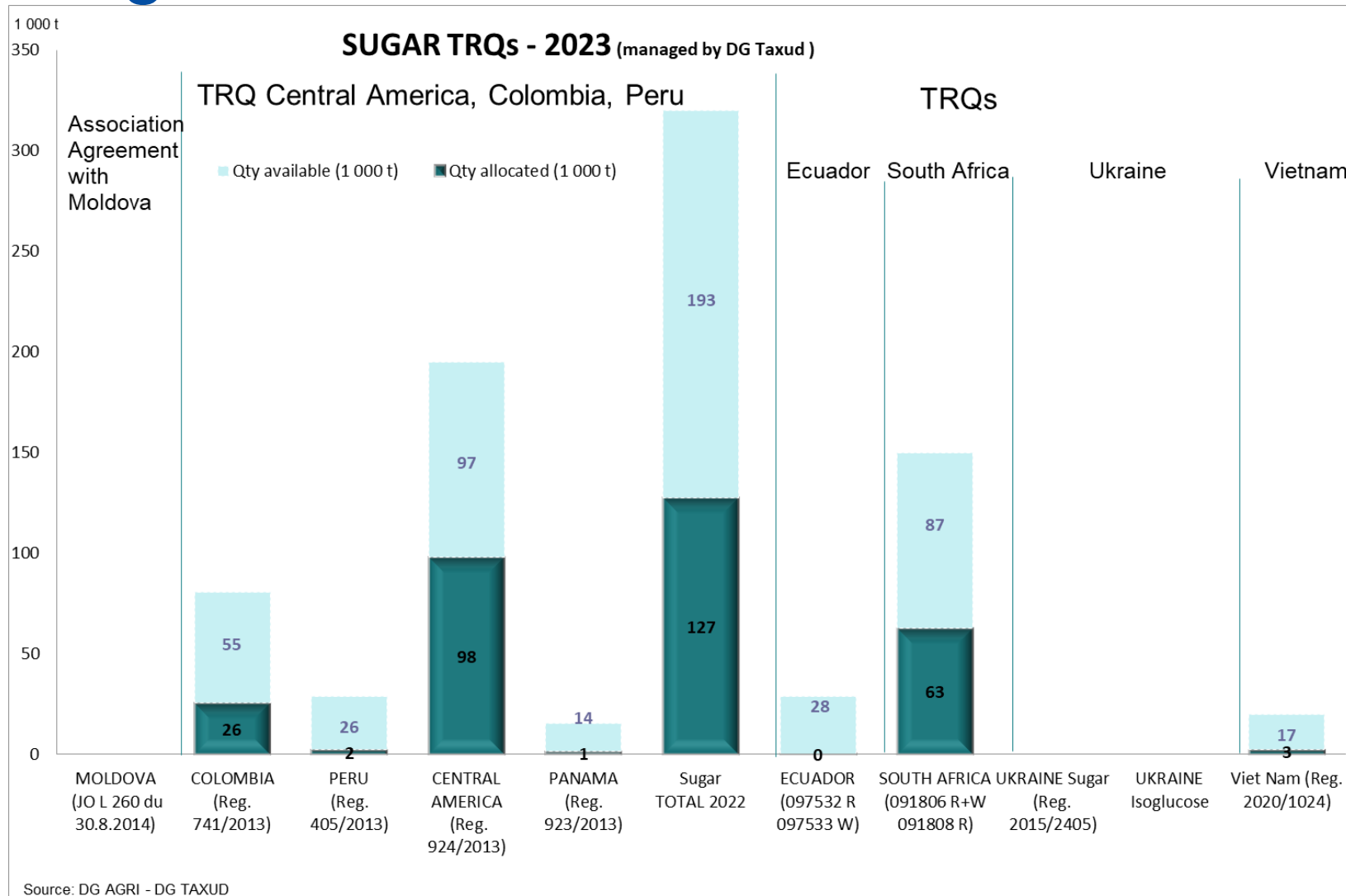


Including Italian import data from EPA/EBA-Fiji (source: COMEXT) recorded in Nov.22 and Jan. 23

Sugar TRQs 2022-2023 (24/04/2023)



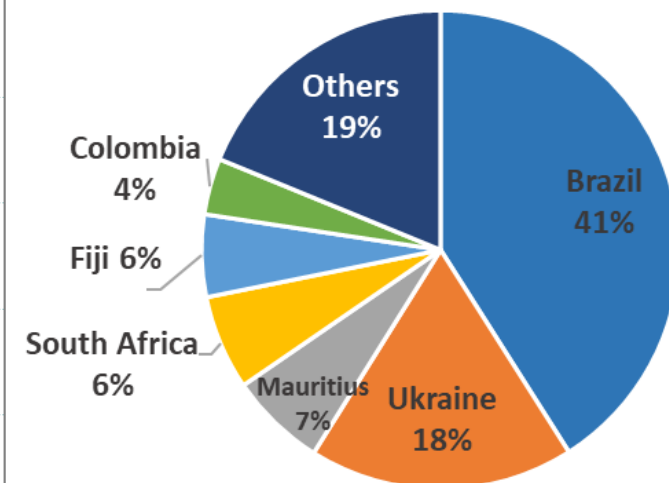
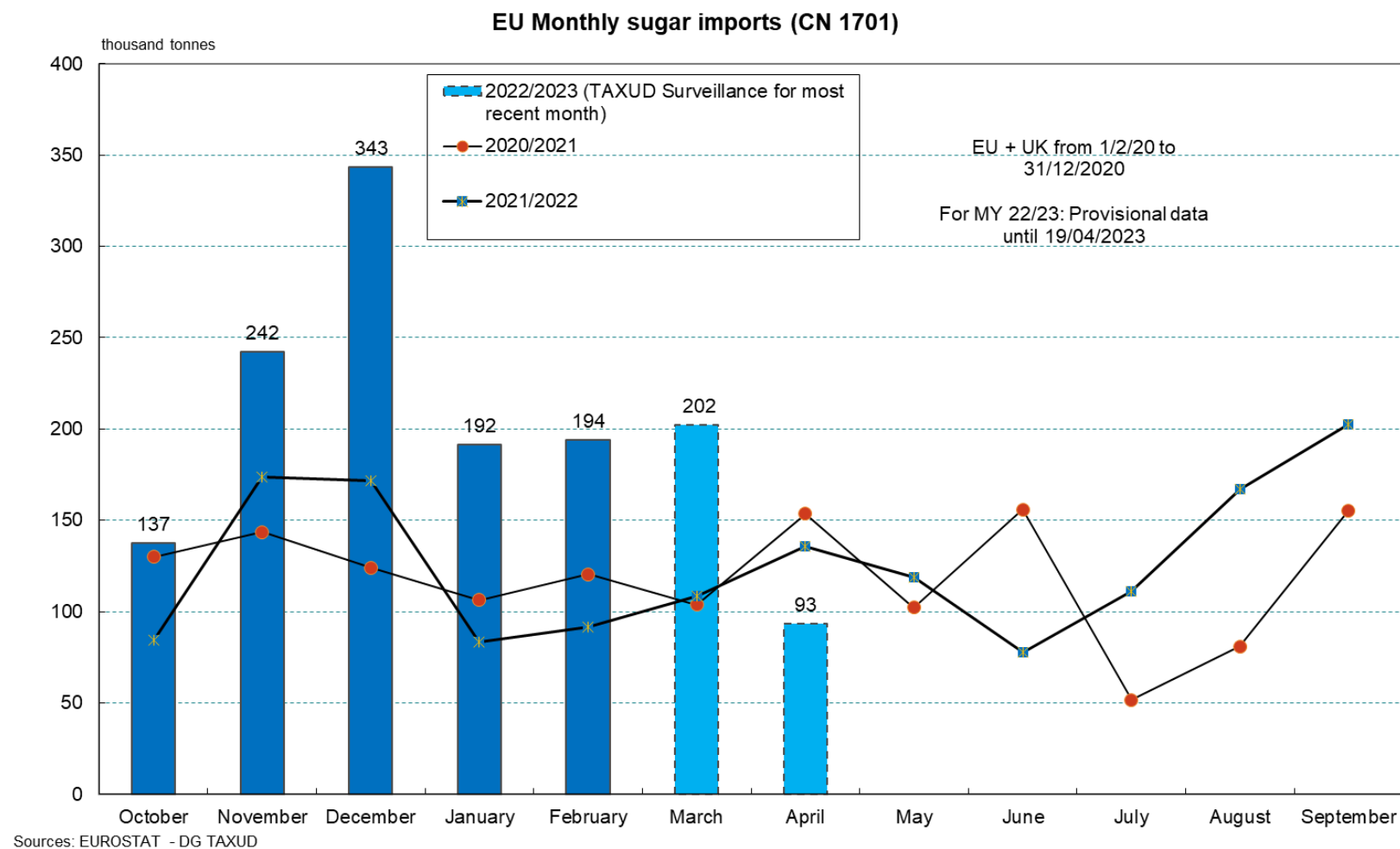
Sugar TRQs 2023 (EU 27) (23/04/2023)



EU Total Sugar Trade Flows

EU Sugar Imports

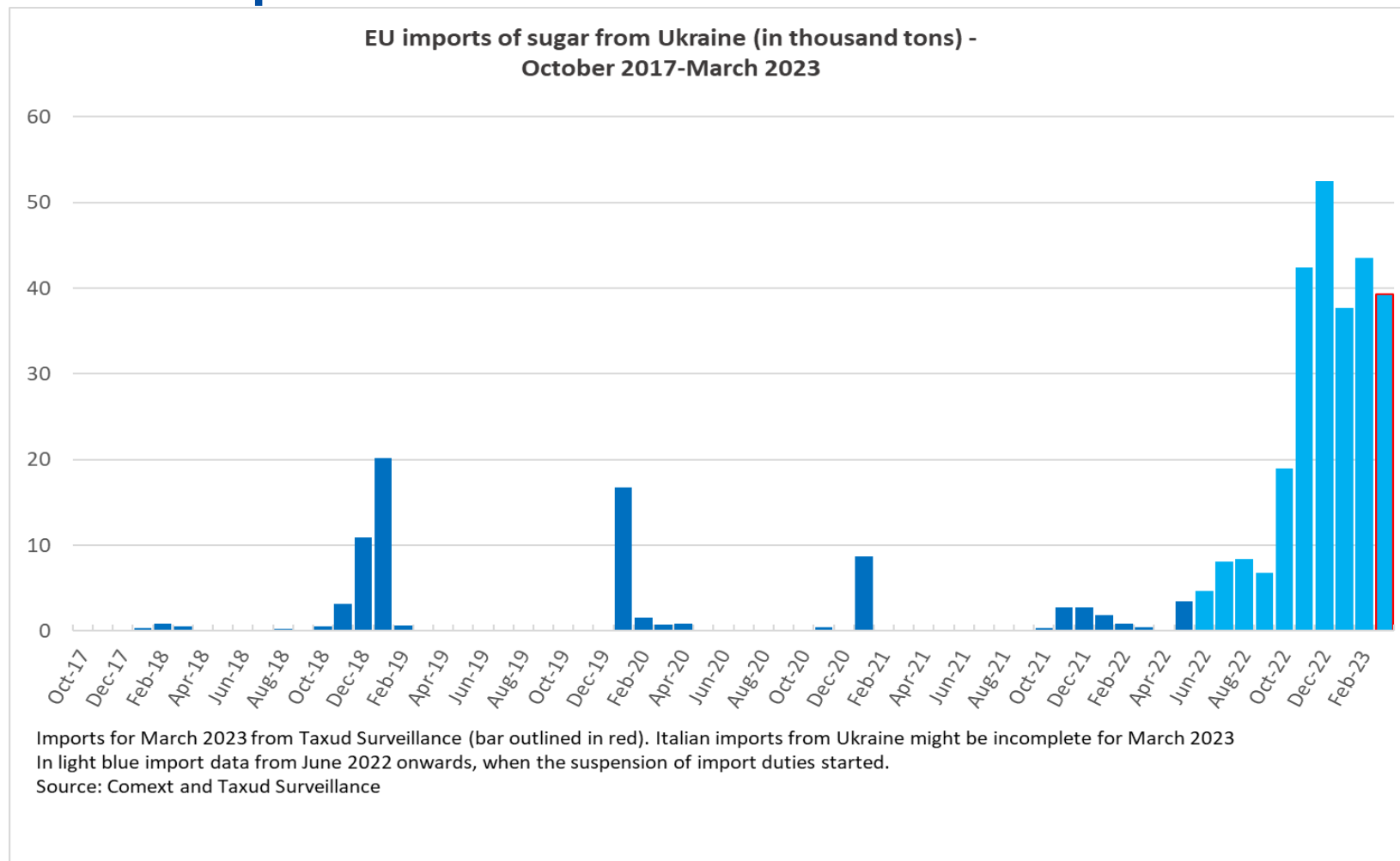
EU Total imports



EU imports by origin in the six months of the current Marketing year 202/23 (Comext and Taxud data)

Provisional figures for UK for February 2023. Incomplete Italian import data for Taxud Surveillance (March and 19 days of April 2023)

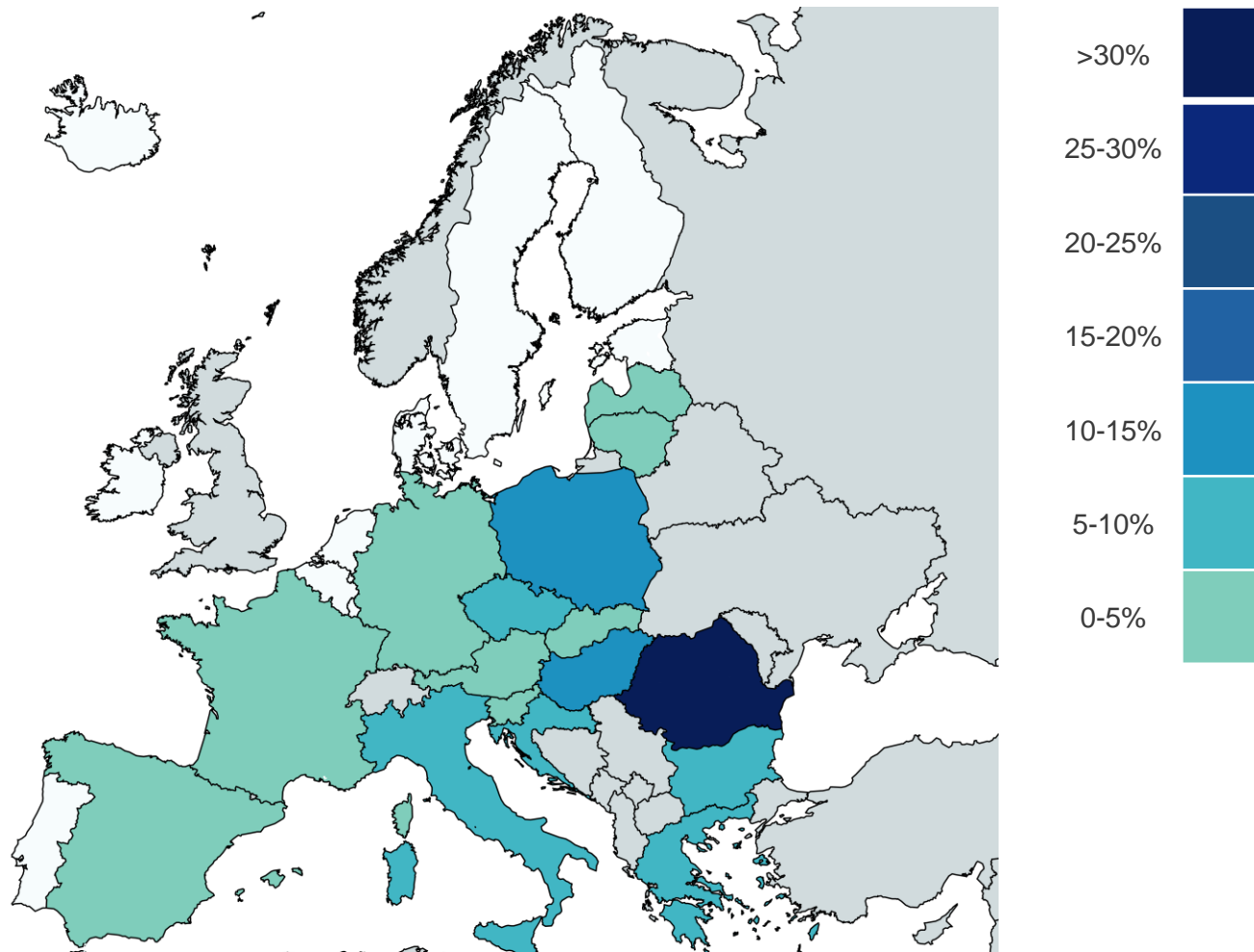
EU imports from Ukraine



Incomplete italian import data for Taxud Surveillance (March 2023)

EU imports from Ukraine

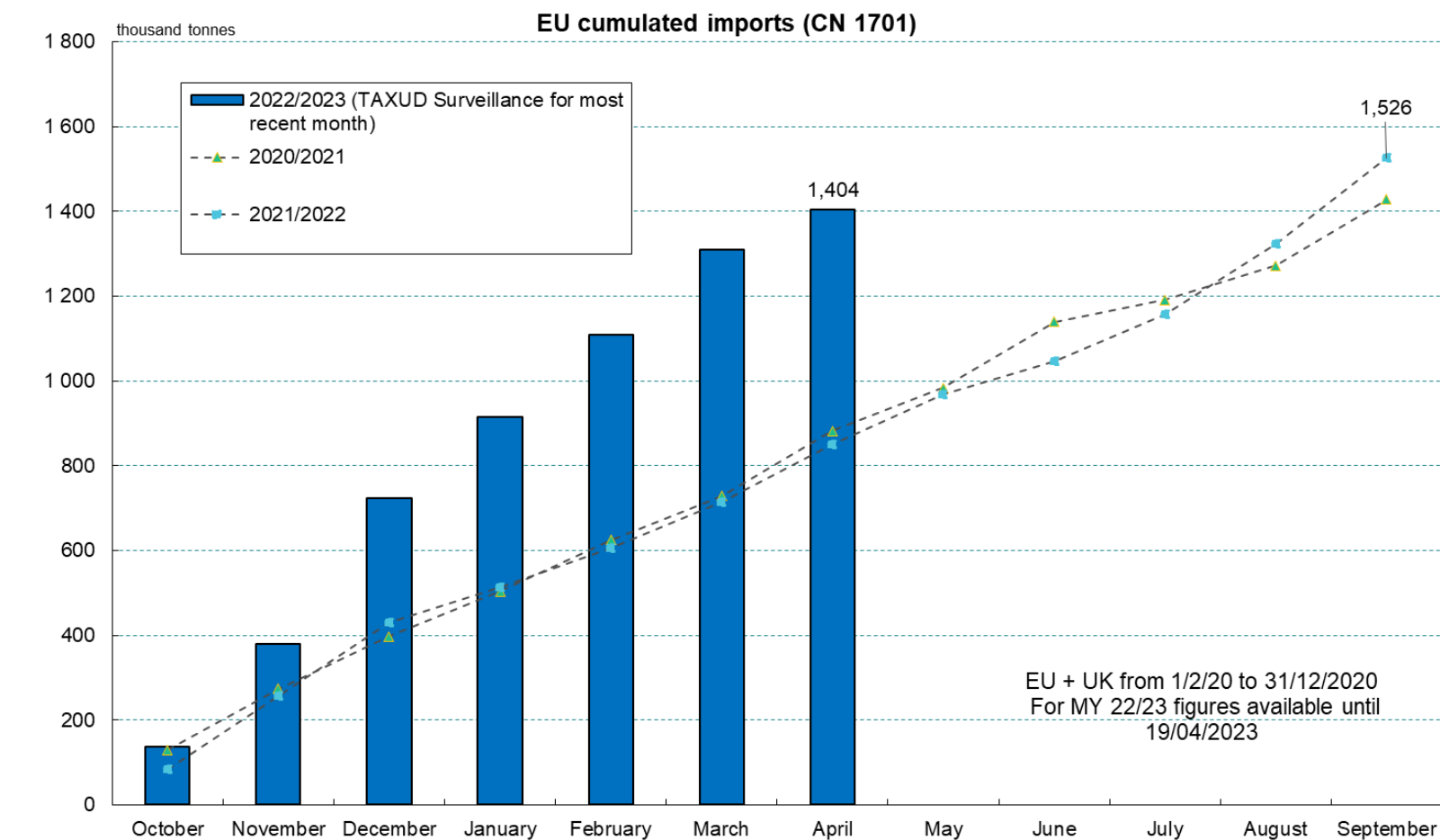
(in tonnes)	Oct.21-Mar.22	Oct. 22-Mar.23	Share
Total	9,119	234,478	
Romania	3,161	73,425	31.3%
Poland	0	34,796	14.8%
Hungary	0	24,145	10.3%
Italy	1,427	20,877	8.9%
Greece	260	18,874	8.0%
Bulgaria	1,987	16,848	7.2%
Croatia		14,923	6.4%
Czechia		11,986	5.1%
Slovenia		5,028	2.1%
Spain	2,284	4,151	1.8%
Lithuania		4,011	1.7%
Latvia		1,946	0.8%
Slovakia		1,525	0.7%
France		1,334	0.6%
Germany		476	0.2%
Austria	0	132	0.1%



Share of total EU imports from Ukraine Oct 22-Mar 23

(Source: Comext-Taxud)

EU Total imports

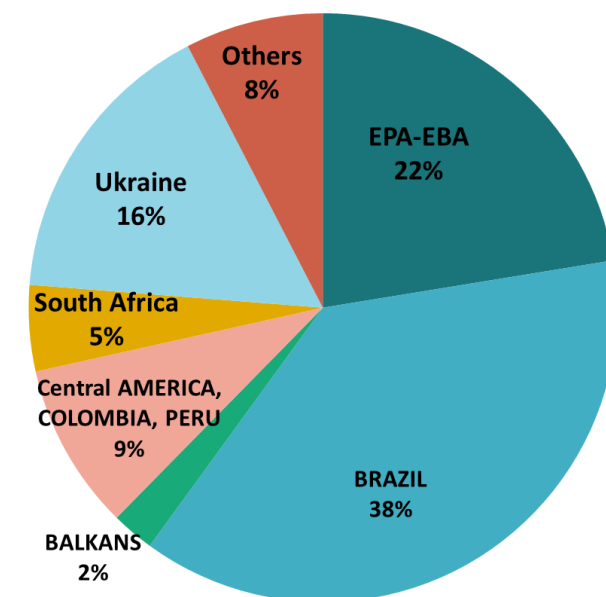
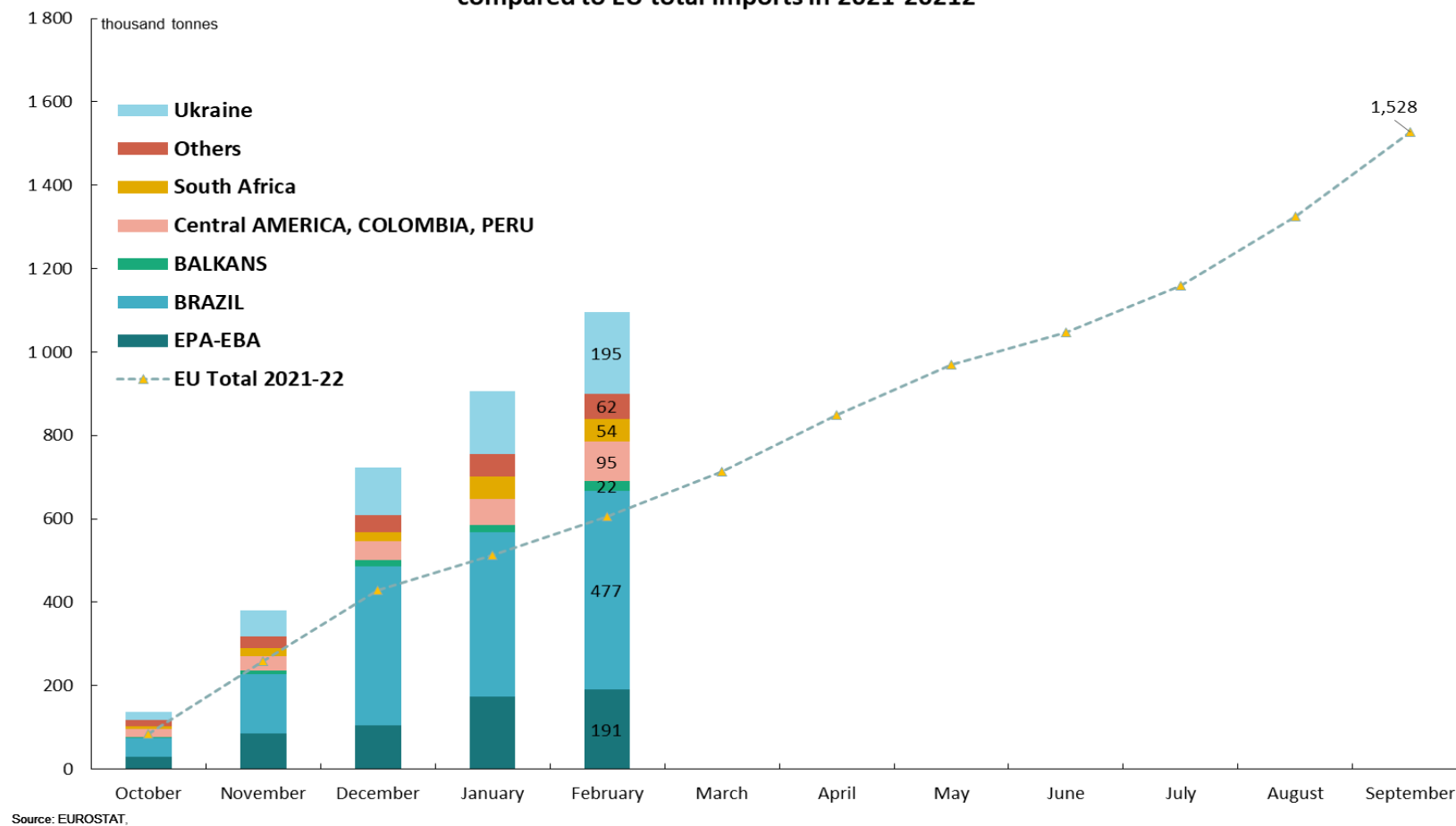


Source: EUROSTAT, Taxud

Provisional figures for UK for February 2023. Incomplete Italian import data for Taxud Surveillance (March and 19 days of April 2023)

EU Total imports

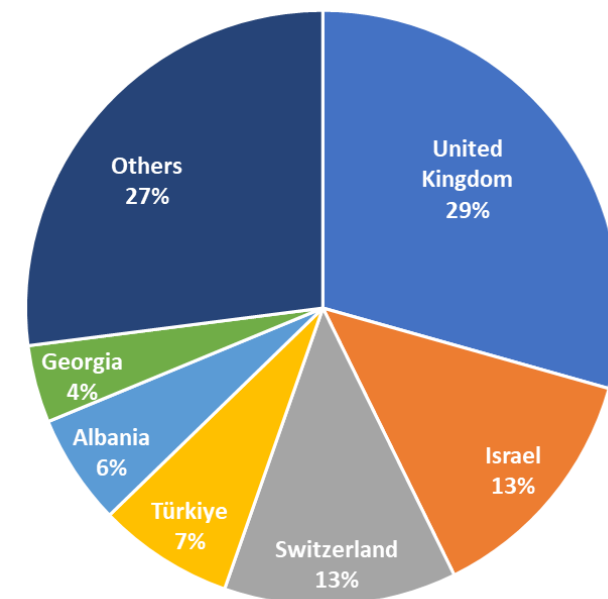
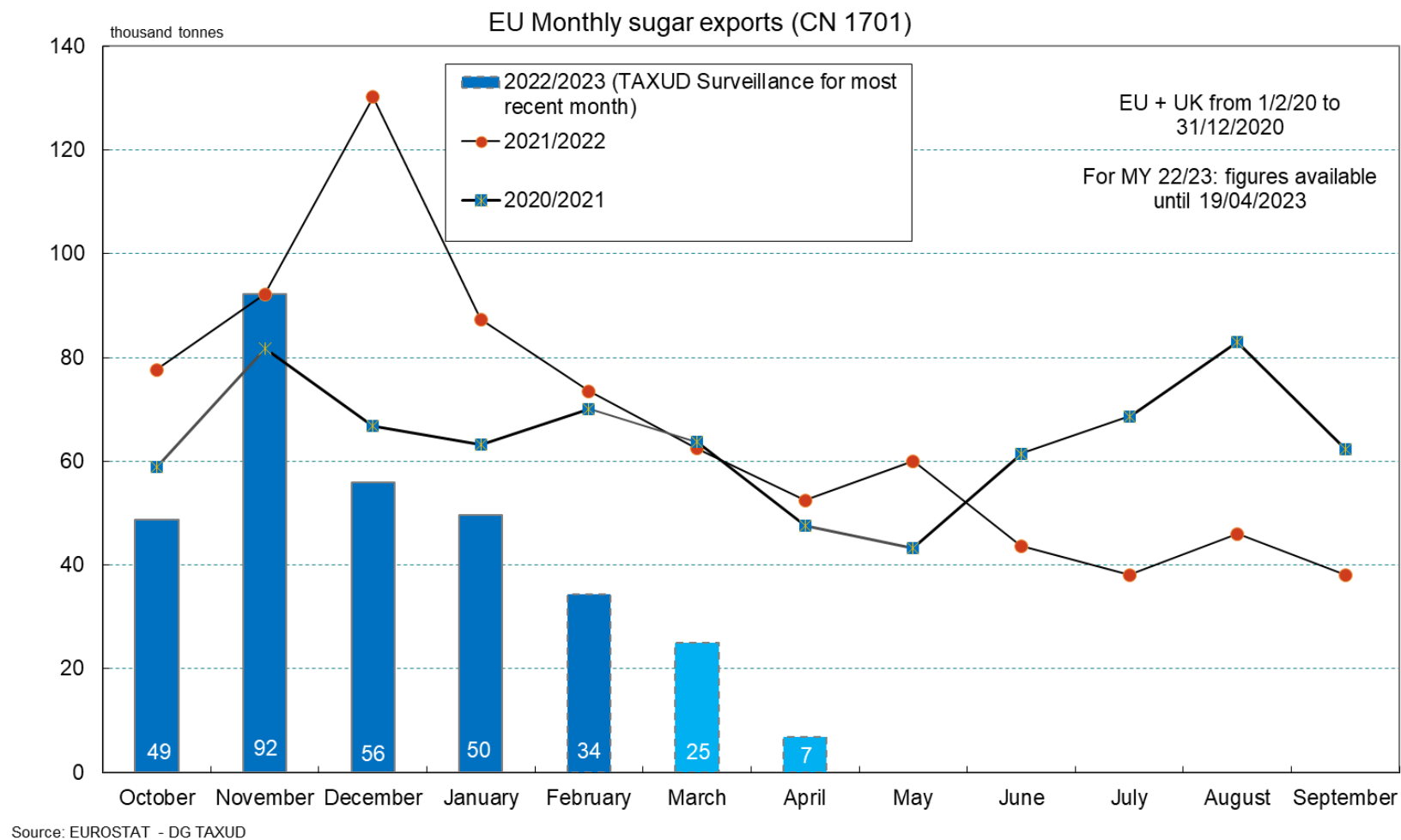
EU Sugar main imports origins in 2022-2023
compared to EU total imports in 2021-2022



Provisional figures for UK for February 2023.

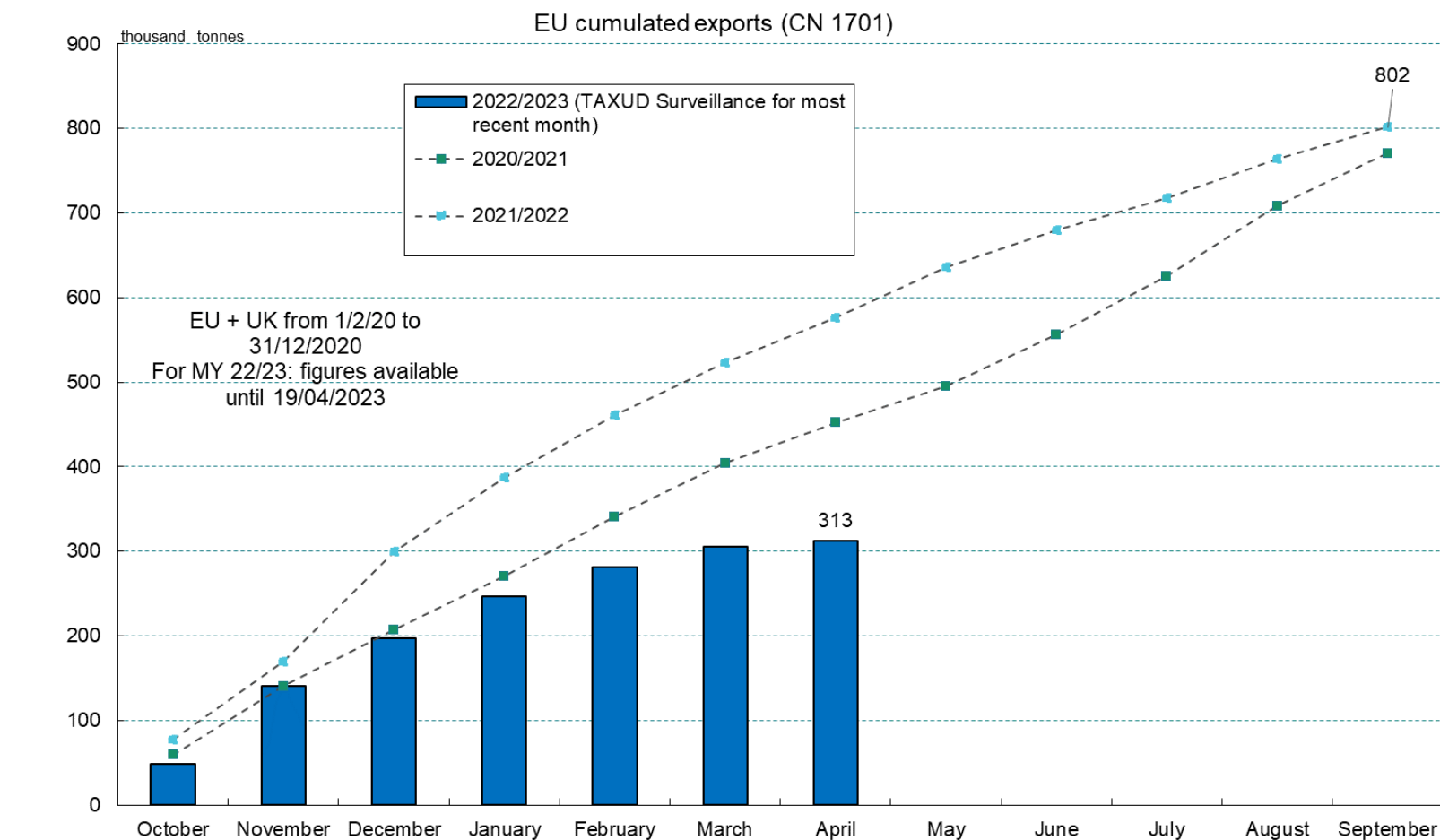
EU Sugar Exports

EU Total exports



EU exports by destination
for six months of the
current Marketing Year
2022/23
(Comext and Taxud)

EU Total exports

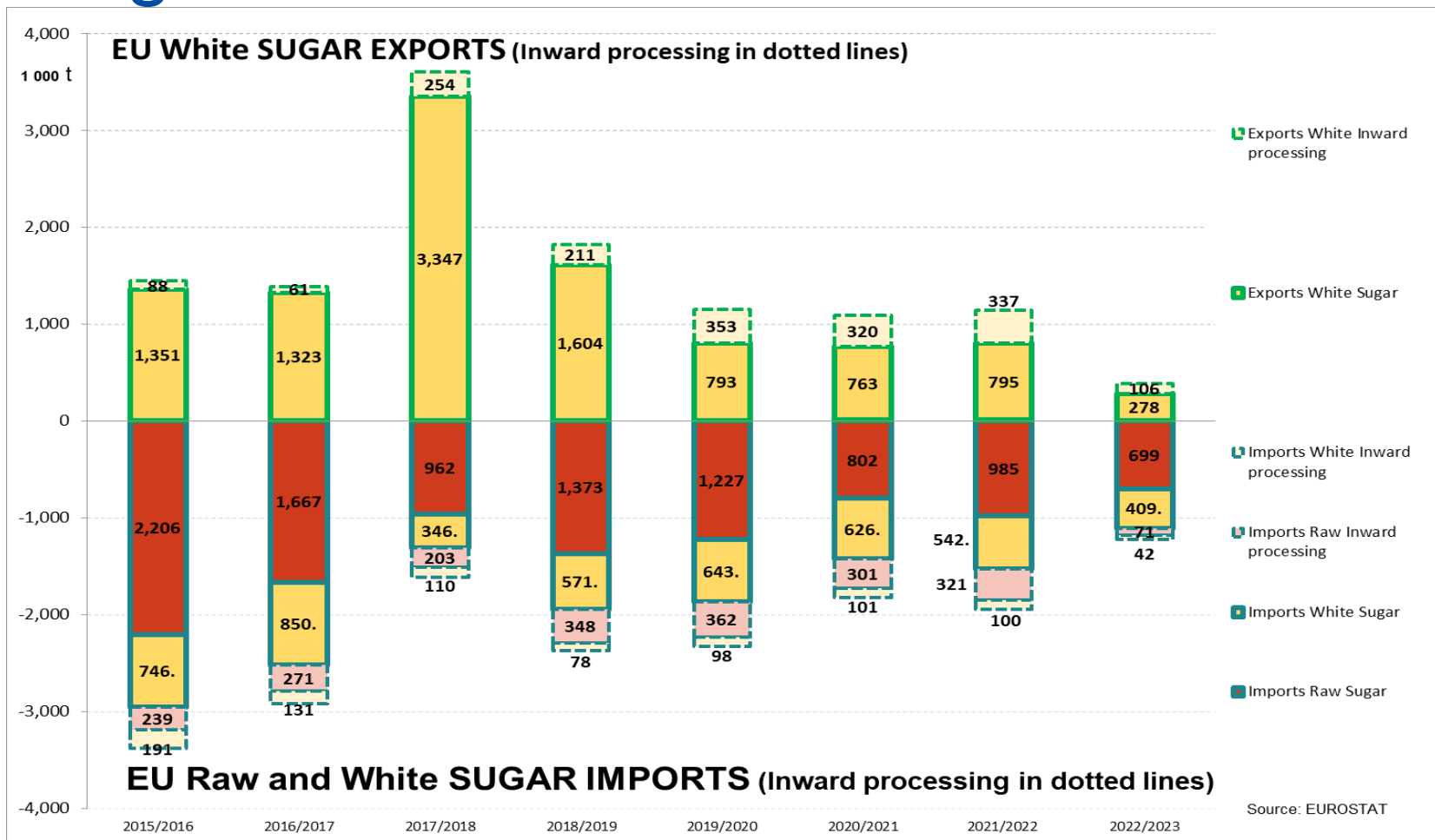


Source: EUROSTAT- DG TAXUD

Provisional figures for UK for February 2023.

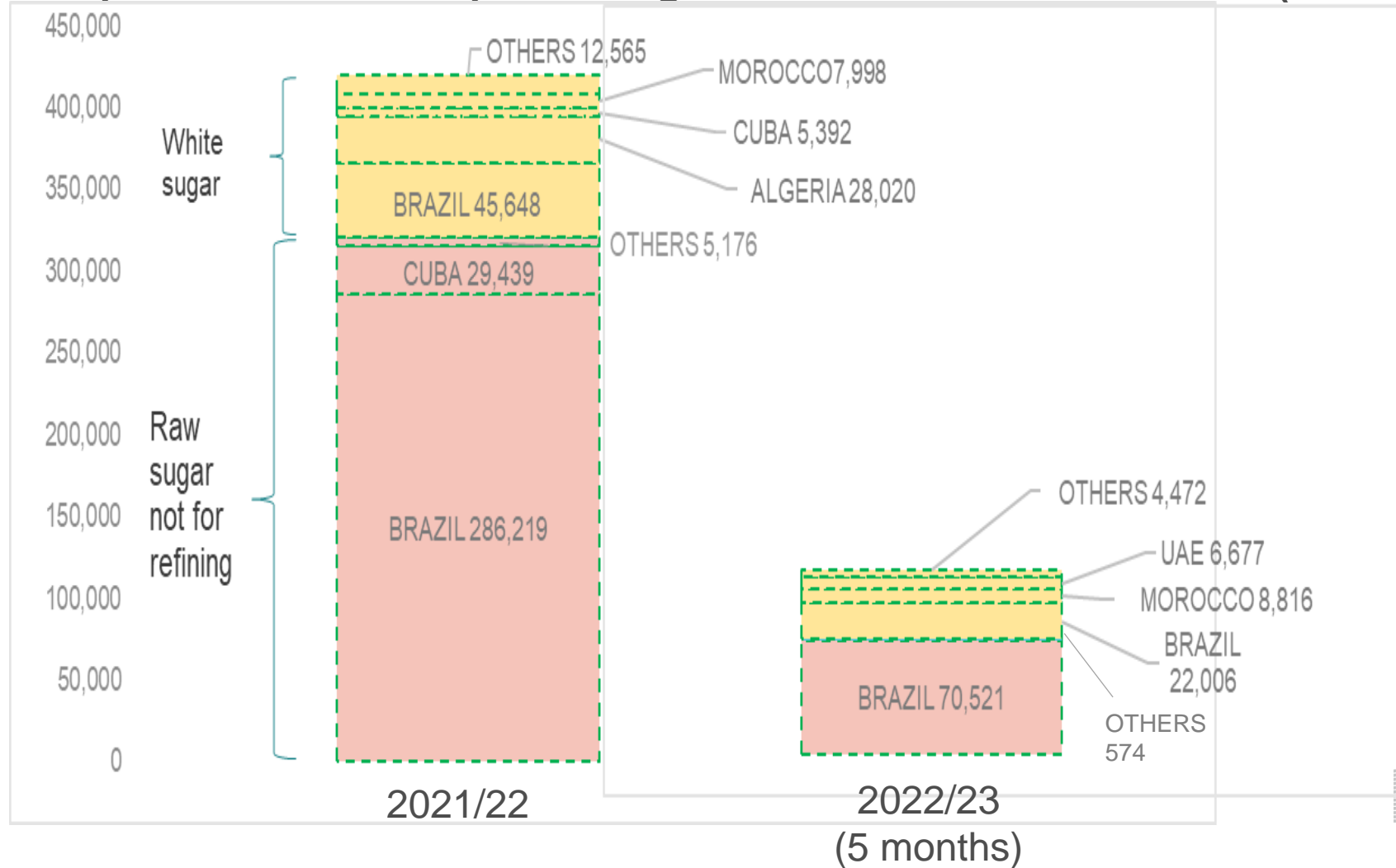
EU Sugar Trade - Inward processing regimes

Sugar trade



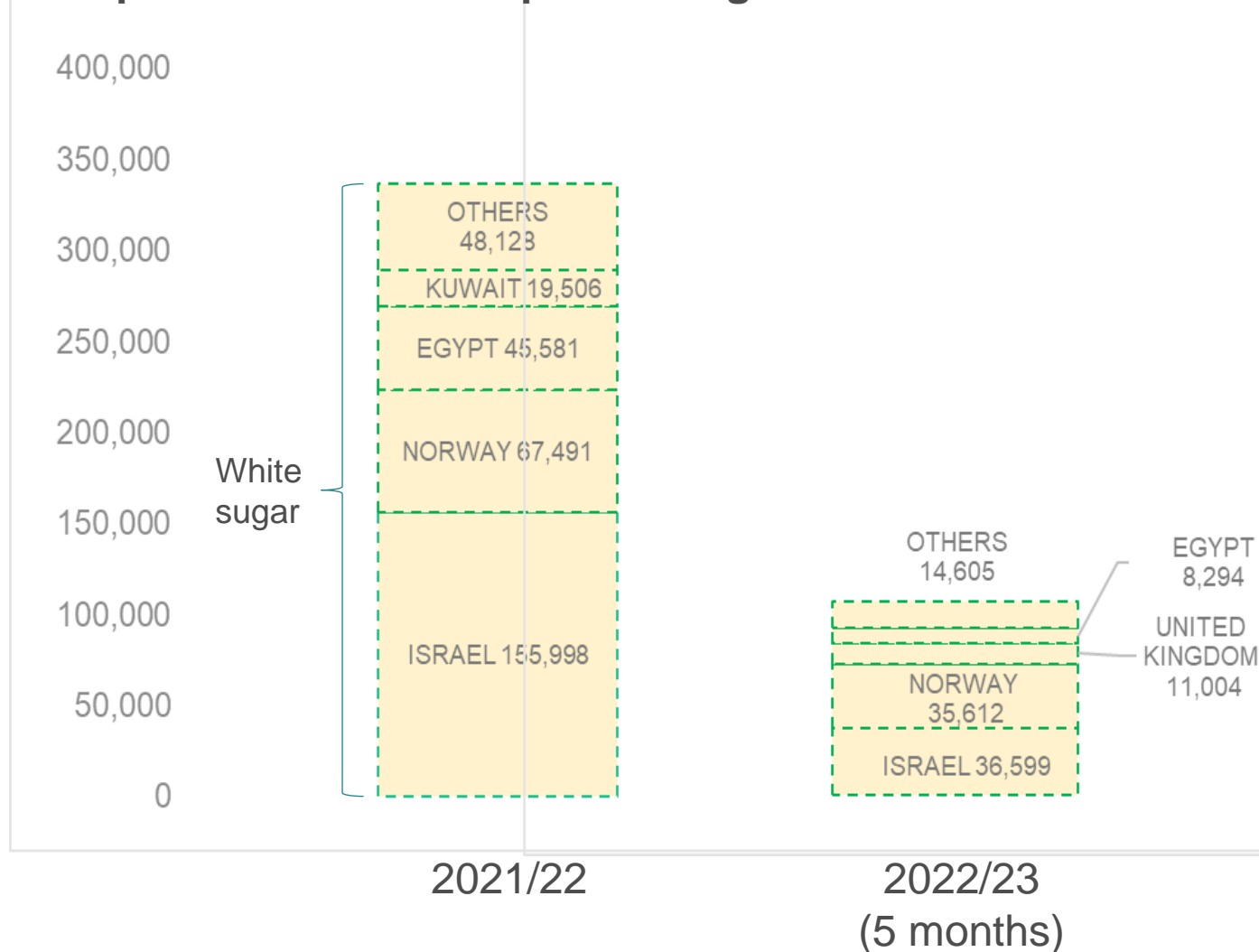
Sugar trade- Imports under inward processing

EU imports under inward processing 2021/22 & 5 months of 2022/23 (in tons)



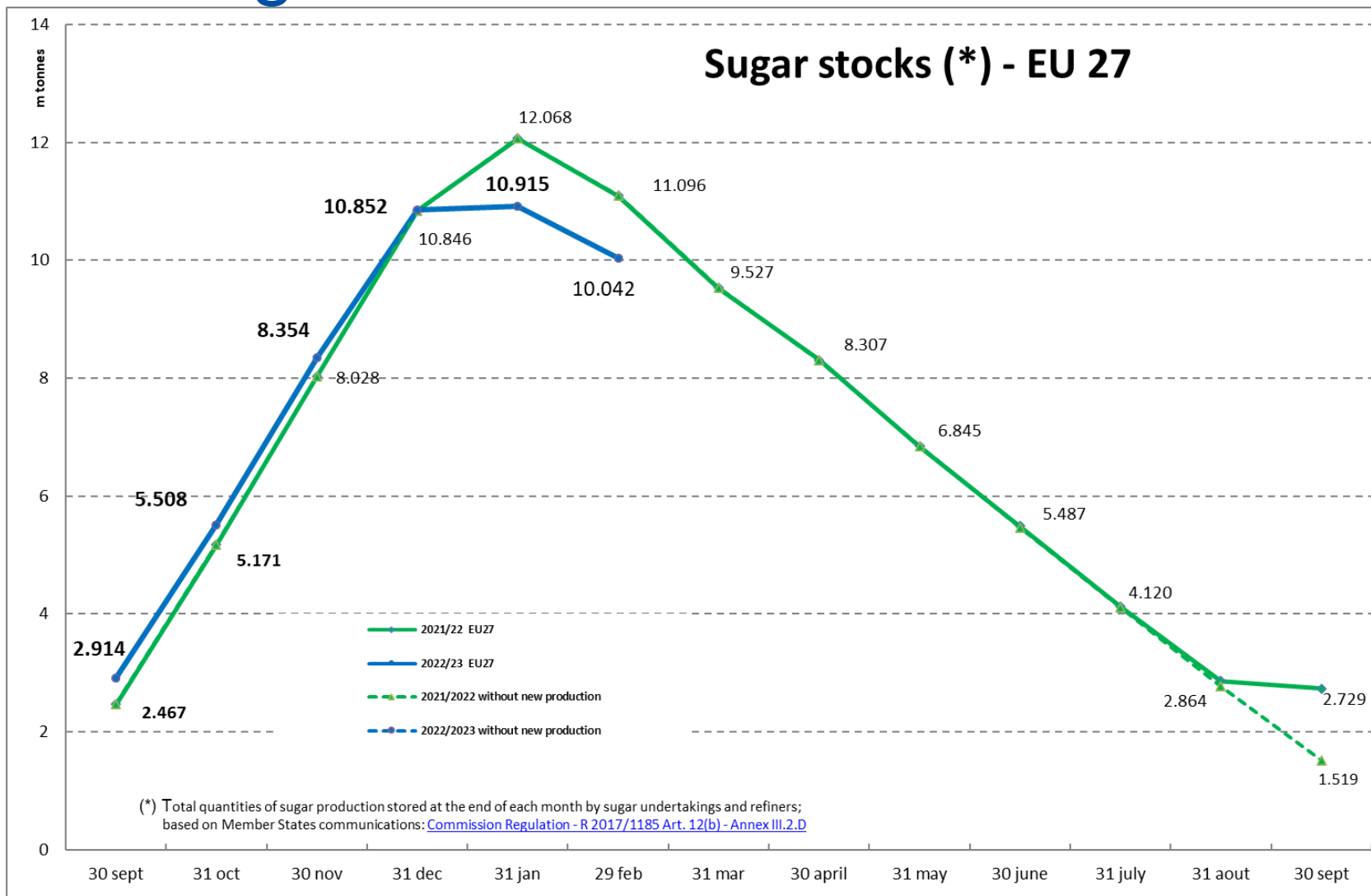
Sugar trade- Exports under inward processing

EU exports under inward processing 2021/22 & 5 months of 2022/23 (in tons)

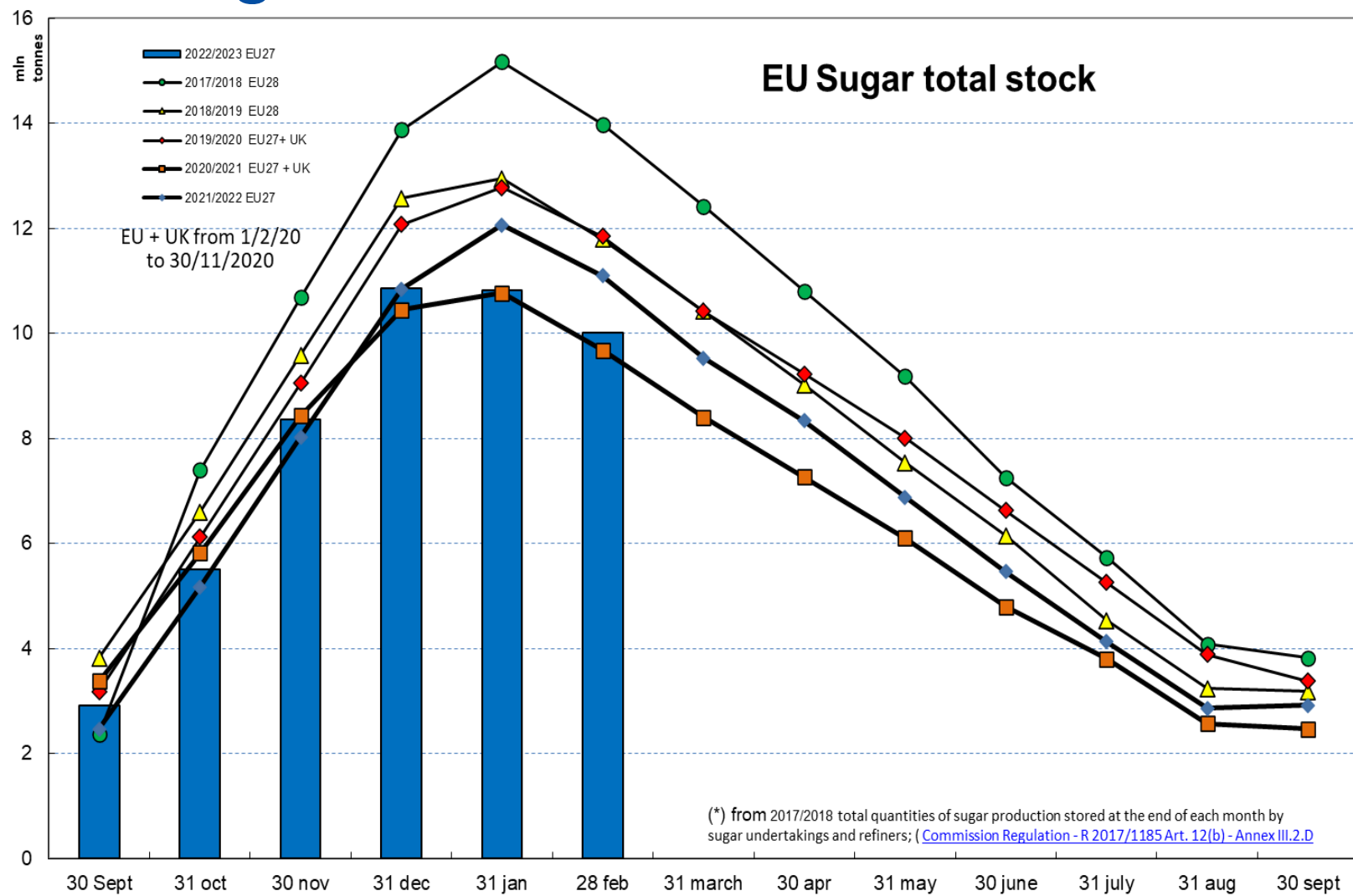


EU Sugar stocks

EU Sugar stocks



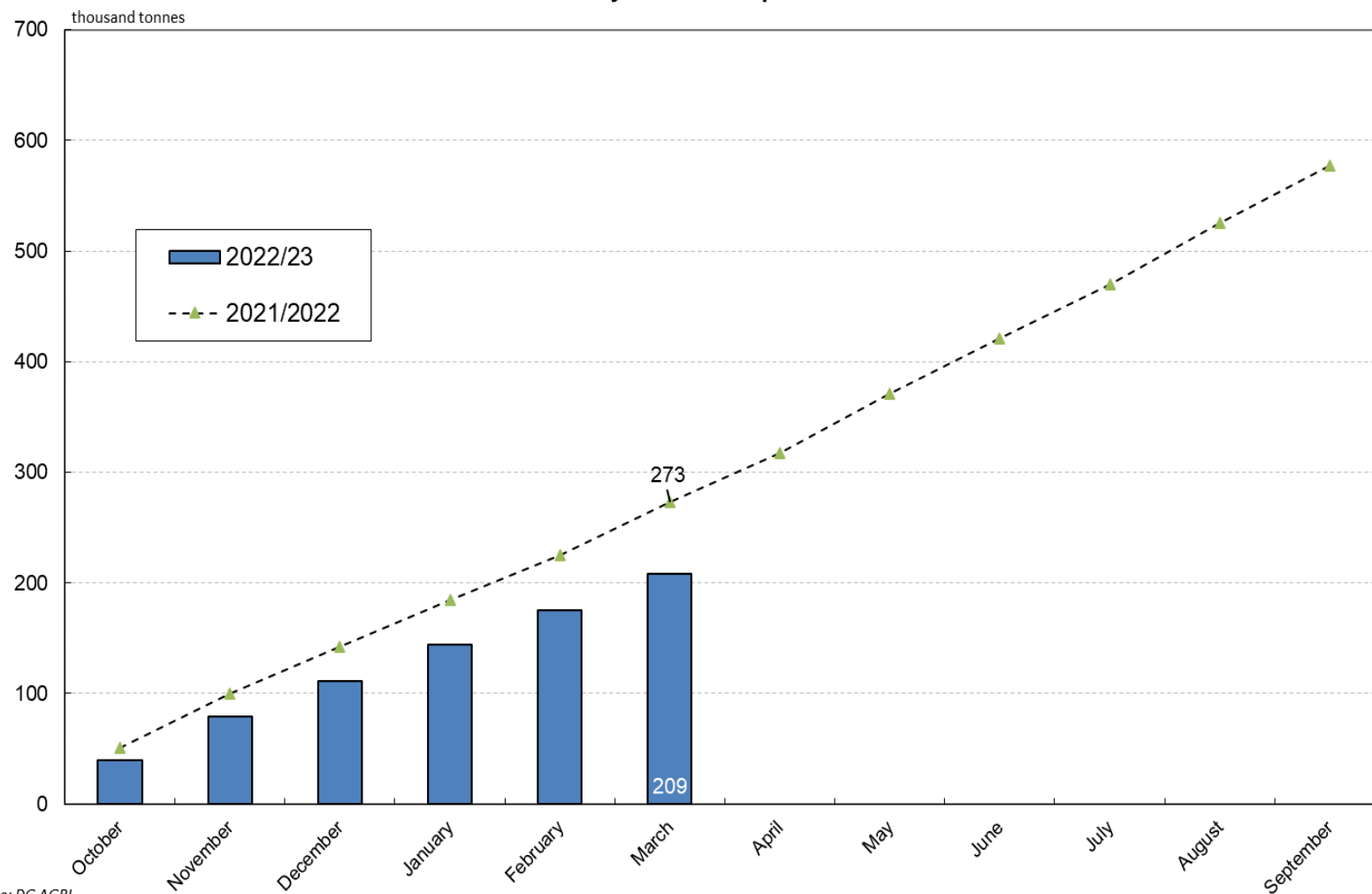
EU Sugar stocks



EU Isoglucose

EU Isoglucose production

ISOGLUCOSE - EU monthly cumulated production for 2022/2023



Source: DG AGRI.

EU Sugar Balance

Sugar production

Estimates MY 2022/2023

DG AGRI E4 8 1 2				
Apr-23				
Estimates sugar production of the 2022/2023 MY (EU27)				
<div> Region 1: AT - CZ - DK - FI - HU - LT - PL - SE - SK Region 2: BE - DE - FR - NL Region 3: BG - ES - HR - IT - RO </div>				
tonnes white sugar equivalent	SUGAR			ISOGLUCOSE
	Areas (1000 ha) (a)	Yield (t/ha) (b) = (c) / (a)	Production of the marketing year (c)	Production of the marketing year
Region 1	431	9.5	4,095,771	
of which: CZ	55	10.9	599,080	
PL	225	8.9	2,007,608	
Region 2	837	11.7	10,014,952	
of which: DE	352	11.2	3,948,850	
FR (Met.)	348	11.4	3,963,055	
FR (Dom.)			203,200 *	
Region 3	71	7.7	546,290	
TOTAL	1,338	10.8	14,657,012	478,000
Sugar production- estimates 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)				
* Estimates from November 2022 (complete estimates).				

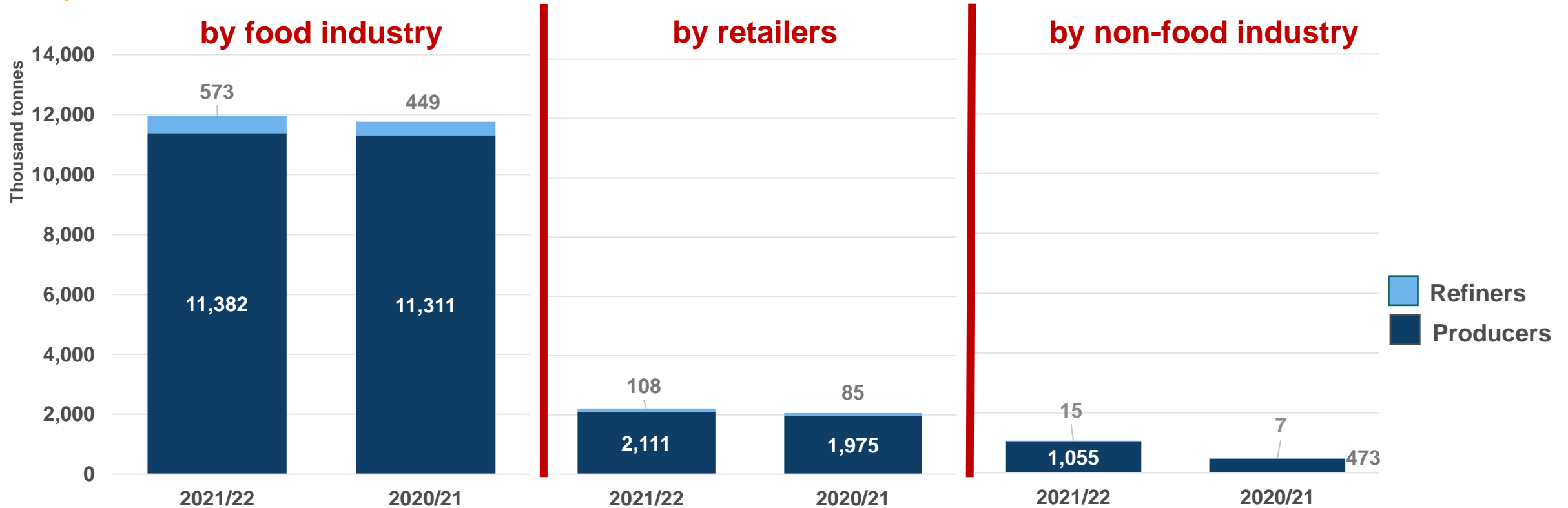
Sugar balance sheet

Estimates MY 2022/2023

Retail sales		Final		Final		Final		Final		Estimates		
2017/18 (Oct.-Sep.) EU 28		2018/19 (Oct.-Sep.) EU 28		2019/20 (Oct.-Sep.) EU + UK		2020/21 (Oct.-Sep.) EU 27		2021/22 (Oct.-Sep.) EU 27		2022/23 (Oct.-Sep.) EU27		x 1000 tonnes wse
Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	
2 174	29	2 423	27	1 829	18	2 160	13	1 225	13	1 519	15	1 Beginning stocks
21 317	602	17 631	561	17 456	566	14 546	620	16 618	577	14 657	478	2 Production
1 869 1 287 583	10	2 489 1 910 579	5	2 434 1 848 586	1	2 073 1 313 760	4	2 278 1 498 780	3	2 980 2 200 780	3	3 Imports 3 1 - as such 3 2 - in processed products
25 360	641	22 542	592	21 719	585	18 779	637	20 120	593	19 156	496	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	14 144 750 600 12 794	536	15 147 750 650 13 742	505	14 800 650 550 13,600	448	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	3 410 860 2 550	88	3 459 801 2 658	73	3 120 520 2 600	36	6 Exports 6 1 - as such 6 2 - in processed products
2 423	27	1 829	18	2 360	13	1 225	13. 0	1 519	15	1 236	12	7 Ending stocks
25 360	641	22 542	592	21 719	585	18 779	637	20 120	593	19 156	496	8 TOTAL OUTLETS 8 = 5 + 6 + 7 = 4

EU Sugar Use

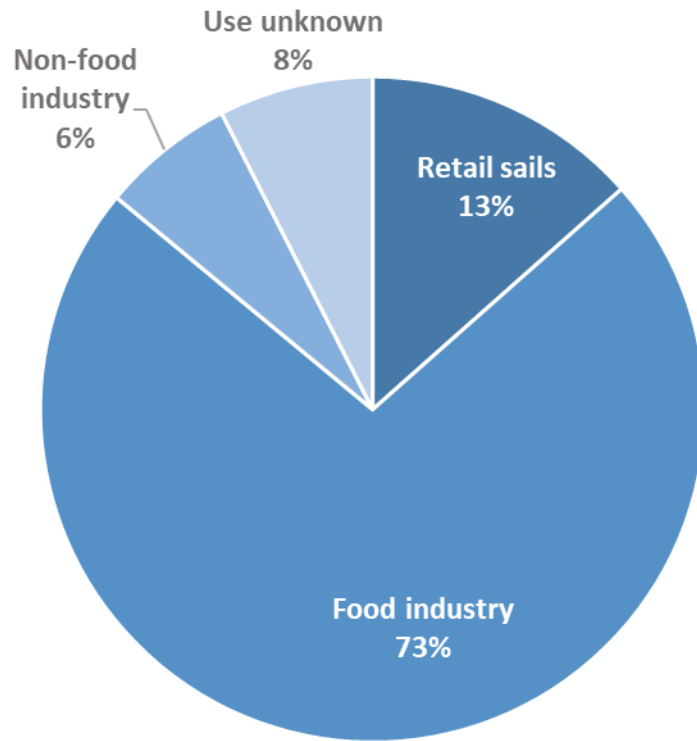
Sugar Use



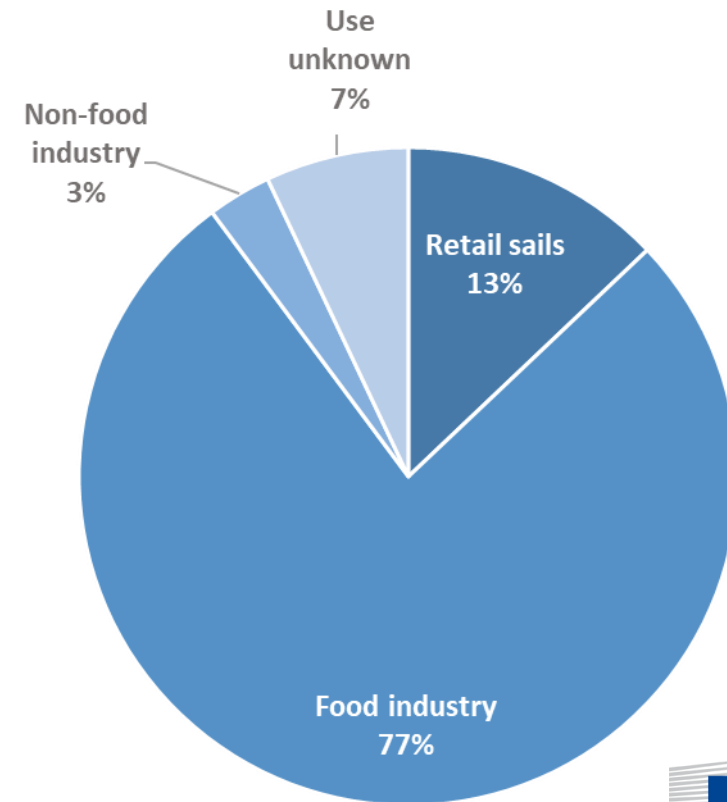
(in tonnes)		2021/22	2020/21	Variation	% variation
Food industry	Producers	11,382,028	11,311,383	70,645	1%
	Refiners	572,819	449,451	123,367	27%
Retail sales	Producers	2,110,939	1,974,559	136,380	7%
	Refiners	108,448	84,833	23,615	28%
Non-food industry	Producers	1,054,810	472,552	582,259	123%
	Refiners	15,412	6,971	8,441	121%

Sugar Use

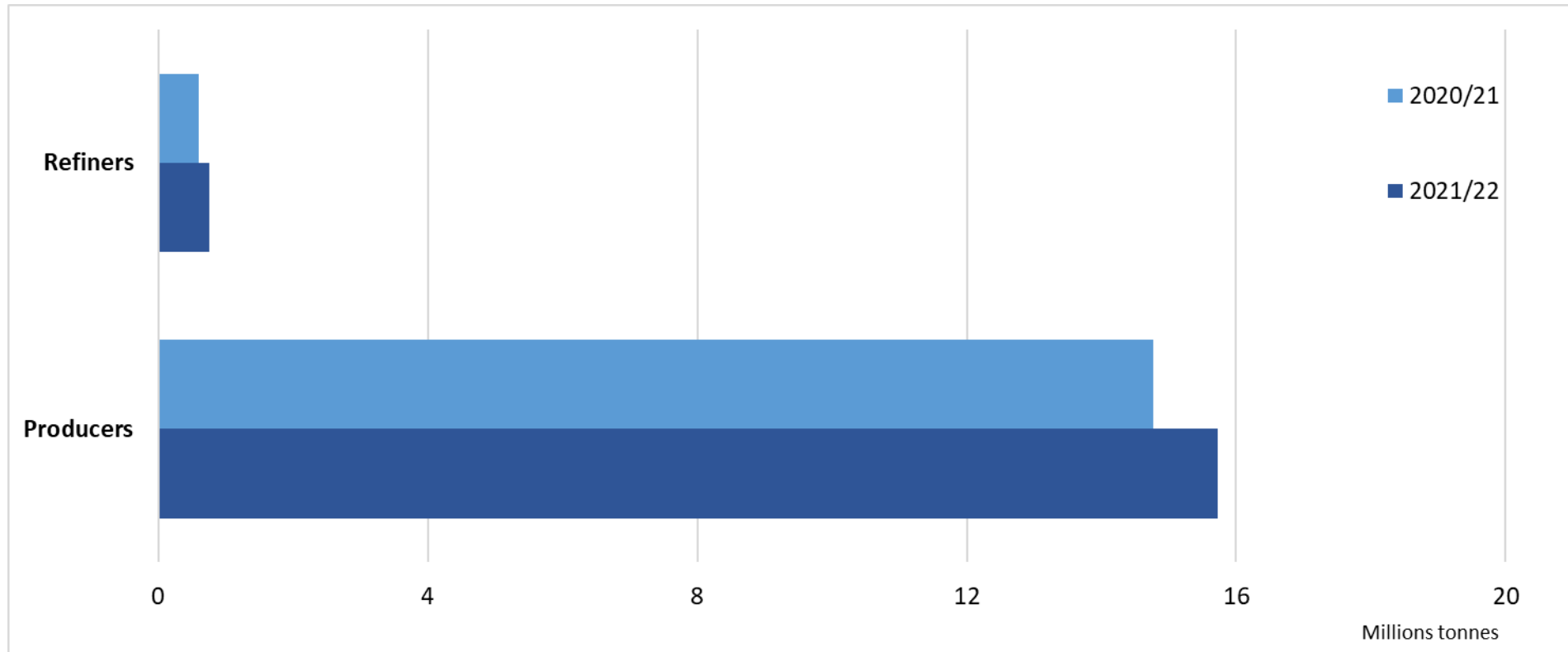
In MY 2021/2022:
16,482,422 tonnes



In MY 2020/2021:
15,374,512 tonnes



Sugar Use



Thank you