

EU Sugar Balance

September 2014 update

AGRI C 4
Civil Dialogue Group - Arable Crops
Sugar sector
30 September 2014

EU Sugar Balance September 2014 update

2012/2013 Final

2013/2014 Estimate

2014/2015 Forecast

Agri C4
8 1 2 / 2010/2011 - PR3

2012/2013 - EU Sugar - Final Production

Final Production of Marketing year 2012/2013 (EU 27)

Dec-13

Source: Communications from Members States (R 952/2006 art 22§4)

tonnes white sugar equivalent	QUOTA R 183/2009	SUGAR								ISOGLUCOSE		SUGAR + ISOGLUCOSE available QUOTA PRODUCTION (k) = (g) + (i)
		Area '000 ha (a)	yield t/ha (b)	"Fresh" Production (c)	carry over from 11/12 to 12/13 (d)	carry forward from 12/13 to 13/14 (e)	Total production (f) = (c) + (d) - (e)	PRODUCTION Quota (g)	OUT OF QUOTA (indust. + export) (h) = (f) - (g)	QUOTA Production (i)	OUT OF QUOTA export (j)	
Be	676 235	63	12.1	761 533	34 015	35 648	759 900	676 235	83 665	114 580	0	790 815
Bg					0	0		0		89 198	0	89 198
Cz	372 459	52	10.9	565 462	9 363	2 649	572 175	372 459	199 716	0	0	372 459
Dk	372 383	41	11.8	480 366	0	9 000	471 366	372 383	98 983	0	0	372 383
De	2 898 256	350	11.5	4 006 872	414 896	401 973	4 019 795	2 898 256	1 121 539	56 638	5 040	2 954 894
ELL (2)	158 702	9	5.9	158 126	576	0	158 702	158 702	0	0	0	158 702
Es	498 480	36	14.8	531 845	23 735	34 530	521 050	498 480	22 570	53 810	1 000	552 290
F (met.)	3 004 811	341	12.4	4 222 847	97 777	18 895	4 301 729	3 004 811	1 296 918	0	0	3 004 811
F (Dom)	432 220			412 164			412 164	412 164	0	0	0	412 164
It (1)	508 379	52	10.4	546 362	42 388	64 782	523 968	508 379	15 589	32 365	170	540 744
Lt (5)	90 252	19	7.6	190 253	53	0	190 306	90 252	100 054	0	0	90 252
Hu	105 420	18	6.4	111 959	0	0	111 959	105 420	6 539	220 266	40 399	325 686
Nl	804 888	73	13.2	968 459	15 000	0	983 459	804 888	178 571	0	0	804 888
At (*)	351 027	49	9.5	469 024	0	0	469 024	351 027	117 996	0	0	351 027
Pl	1 405 608	192	9.4	1 803 332	68 297	48 051	1 823 578	1 405 608	417 970	42 861	561	1 448 470
Pt (continental)	0				0	0	0	0		11 279	0	11 279
Pt (Açores)	9 953	0		358			358	358	0	0	0	358
Ro	104 689	28	9.3	258 621	0	1 459	257 162	104 689	152 473	0	0	104 689
Sk (3)	112 320	19	11.8	228 698	0	0	228 698	112 320	116 379	66 838	0	179 158
Fi (4)	80 999	12	6.2	140 460	9 673	0	150 133	80 999	69 134	0	0	80 999
Swe	293 186	38	9.6	365 869	7 003	14 000	358 872	293 186	65 686	0	0	293 186
Uk	1 056 474	104	11.0	1 143 875	79 160	43 097	1 179 937	1 056 474	123 463	0	0	1 056 474
TOTAL	13 336 741	1 497	11.3	17 366 485	801 934	674 083	17 494 336	13 307 090	4 187 246	687 836	47 170	13 994 926

(*) AT : including sugar from molasses

(1) IT: of which 208 000 t 'travail à façon' ? Vérifier

(4) FI: of which 69 134 t 'travail à façon'

(2) EL: of which 103 427 tonnes 'travail à façon'

(5) LT: of which 42 000 t 'travail à façon'

(3) SK: of which 101 151 tonnes 'travail à façon'

quota disponible

EU Sugar Balance September 2014 update

2012/2013 Final

2013/2014 Estimate

2014/2015 Forecast

2013/2014 - EU Sugar - Provisional Production

tonnes white sugar equivalent	QUOTA R 513/2010	SUGAR							ISOGLUCOSE	ISOGLUCOSE	SUGAR +
		areas	yield	Production	carry forward	carry forward	Total	PRODUCTION	OUT OF	OUT OF	ISOGLUCOSE
		'000 ha	t/ha	of the	from 12/13	from 13/14	Production	under Quota	QUOTA	QUOTA	available
		(a)	(b)	campaign	to 13/14	to 14/15	(f) = (c) + (d) - (e)	(h)	(g) = (f) - (h)	(export / release EU market)	QUOTA PRODUCTION
BE	676 235	61.8	12.6	781 813	35 648	37 700	779 761	676 235	103 526		790 815
BG							0	0			89 198
CZ	372 459	64.6	8.3	539 166	2 649	20 207	521 608	372 459	149 148		372 459
DK	372 383	38.0	12.2	461 997	9 000	31	470 966	372 383	98 583		372 383
DE	2 898 256	334.6	11.1	3 428 298	401 973	188 027	3 642 244	2 898 256	743 989	56 638	2 954 894
EL	158 702	5.8	6.9	160 199		1 497	158 702	158 702	0	0	158 702
ES(**)	498 480	35.2	12.9	455 500	34 530	1 381	488 648	488 648	0	53 810	542 458
FR (met.)	3 004 811	360.7	11.5	4 162 470	18 895	5 712	4 175 653	3 004 811	1 170 842		3 004 811
FR (Dom)	432 220			419 987			419 987	419 987	0		419 987
Hr	192 877	25.8	7.5	192 880		3	192 877	192 877	0		192 877
IT	508 379	40.7	11.2	501 200	64 616	60 211	505 605	505 605	0	32 493	538 098
LT	90 252	17.8	8.6	172 153	10		172 163	90 252	81 911		90 252
HU	105 420	15.6	7.4	115 649	0		115 649	105 420	10 229	250 266	355 686
NL	804 888	73.3	12.9	947 903	0	20 000	927 903	804 888	123 015	0	804 888
AT (*)	351 027	51.0	10.2	482 328	0	277	482 051	351 027	131 024		351 027
PL	1 405 608	184.9	9.6	1 713 105	48 051	47 729	1 713 426	1 405 608	307 818	42 861	1 448 470
PT (contine)	0			0			0	0		12 500	12 500
PT (Açores)	9 953	0.4		1 800			1 800	1 800	0		1 800
RO	104 689	28.6	5.2	245 936	1 459		247 395	104 689	142 706		104 689
SK	112 320	20.1	10.9	218 495	0		218 495	112 320	106 176	68 095	180 414
FI	80 999	12.0	6.1	116 458	0		116 458	80 999	35 459	0	80 999
SE	293 186	35.4	10.7	378 000	14 000	26 000	366 000	293 186	72 814		293 186
UK	1 056 474	106.0	12.5	1 323 519	43 097	89 921	1 276 695	1 056 474	220 221		1 056 474
TOTAL	13 529 618	1 512	11.1	16 818 855	673 928	498 696	16 994 087	13 496 626	3 497 461	720 441	14 217 067

(*) AT : including sugar from molasses
 (**) ES: quota not filled by all undertakers
 EL Travail à façon 120 000 tonnes

CZ Travail à façon 59 230 tonnes
 IT Travail à façon 45 000 tonnes
 LT Travail à façon 20 000 tonnes

AT Travail à façon 3 880 t
 PL Travail à façon 5 600 t
 RO Travail à façon 97 430 t

FR Travail à façon 205 000 t quota disponible
 SK Travail à façon 46 000 tonnes
 FI Travail à façon 42 870 tonnes

2013/2014 EU Sugar Balance Quota – September 2014 update

EU sugar imports forecast: 3.564 mio t

Imports as such: 3 mio t of which

- **ACP/LDC forecast at 2.100 mio t**
- **CXL forecast at 0.677 mio t – 0.325 mio t (CXL BR)**
In wse: (0.656 mio t – 0.315 mio t) = 0.341 mio t
- **Balkan & Moldavia forecast at 0.220 mio t**
- **TRQ Cent. Am., Col., Peru forecast at 0.250 mio t**
- **Transitional measures (Croatia): 0.040 mio t**
- **Others: 0.05 mio t (non-preferential)**

Imports in processed products: 0.564 mio t (2013/14 estimate)

EU Sugar Balance September 2014 update

2012/2013 Final

2013/2014 Estimate

2014/2015 Forecast

2013/2014 2014/2015 Areas

September 2014 Update

*Communication to the
Commission - 2014/2015*

Areas: 1 560 000 Ha

R 952/2006 Art 22 para 3

	areas '000 ha 2014/15	areas '000 ha 2013/14	Difference
BE	59.5	61.8	-3.7%
BG			
CZ	63.0	64.6	-2.5%
DK	35.5	38.0	-6.5%
DE	356.7	334.6	6.6%
EL	7.5	5.8	29.3%
ES	38.1	35.2	-
FR (Met.)	371.7	360.7	3.1%
FR (Dom.)			
HR	26.5	25.8	
IT	49.6	40.7	21.8%
LT	16.2	17.8	-8.8%
HU	15.1	15.6	-3.3%
NL	75.4	73.3	2.9%
AT	50.7	51.0	-0.5%
PL	190.0	184.9	2.8%
PT (Continent)			
PT (Açores)	0.35	0.36	-
RO	29.2	28.6	2.3%
SK	21.8	20.1	8.6%
FI	13.0	12.0	8.3%
SE	34.0	35.4	-4.0%
UK	106.0	106.0	0.0%
TOTAL	1 560	1 512	3.2%

2014/2015 - EU Sugar – Production Forecast

tonnes white sugar equivalent	QUOTA <i>R 513/2010</i>	SUGAR						ISOGLUCOSE	SUGAR + ISOGLUCOSE available QUOTA PRODUCTION
		areas '000 ha (a)	yield t/ha (b)	Production of the campaign (c) = (a) * (b)	carry forward from 13/14 to 14/15 (d)	Total Production (e) = (c) + (d)	PRODUCTION under Quota (f)	OUT OF QUOTA (indust. , carry.f.) (g) = (e) - (f)	
BE	676 235	59.5	13.4	800 000	37 700	837 700	676 235	161 465	790 815
BG							0	89 198	89 198
CZ	372 459	63.0	9.9	621 466	20 207	641 673	372 459	269 214	372 459
DK	372 383	35.5	12.3	437 537	31	437 568	372 383	65 185	372 383
DE	2 898 256	356.7	12.4	4 440 096	188 027	4 628 123	2 898 256	1 729 867	2 954 894
EL	158 702	7.5	6.5	48 538	1 497	50 034	50 034	0	50 034
ES	498 480	38.1	13.7	522 809	1 381	524 190	498 480	25 709	552 290
FR (Met.)	3 004 811	371.7	14.0	5 200 000	5 712	5 205 712	3 004 811	2 200 901	3 004 811
FR (Dom.)	432 220			255 000		255 000	255 000	0	255 000
HR	192 877	26.5	7.5	192 877	3	192 880	192 877	3	192 877
IT	508 379	49.6	9.7	482 313	60 211	542 524	508 379	34 145	540 872
LT	90 252	16.2	8.1	130 463		130 463	90 252	40 211	90 252
HU	105 420	15.1	7.6	115 103		115 103	105 420	9 683	355 686
NL	804 888	75.6	13.3	1 130 000	20 000	1 150 000	804 888	345 112	804 888
AT	351 027	50.7	10.5	530 855	277	531 132	351 027	180 105	351 027
PL	1 405 608	190.0	9.0	1 710 000	47 729	1 757 729	1 405 608	352 121	1 448 470
PT (Contin.)	0			0		0	0	12 500	12 500
PT (Açores)	9 953	0.35		1 800		1 800	1 800	0	1 800
RO	104 689	29.2	7.4	215 313		215 313	104 689	110 624	104 689
SK	112 320	21.8	9.1	198 561	0	198 561	112 320	86 241	180 414
FI	80 999	13.0	6.6	85 587		85 587	80 999	4 588	80 999
SE	293 186	34.0	10.3	348 753	26 000	374 753	293 186	81 567	293 186
UK	1 056 474	106.0	14.2	1 500 000	89 921	1 589 921	1 056 474	533 447	1 056 474
TOTAL	13 529 618	1 560	12.2	18 967 071	498 696	19 465 767	13 235 577	6 230 189	13 956 018

2014/2015 EU Sugar Balance Quota – September 2014 update

EU sugar imports forecast: 3.79 mio t

Imports as such: 3.225 mio t of which

- **ACP/LDC forecast at 2.000 mio t**
- **CXL forecast at 0.677 mio t**
- **Balkan & Moldavia forecast at 0.220 mio t**
- **TRQ Cent. Am., Col., Peru forecast at 0.260 mio t**
- **Transitional measures (Croatia): 0.040 mio t**
- **Others: 0.05 mio t (non-preferential)**

Imports in processed products: 0.564 mio t (2013/14 level)

SUGAR AND ISOGLUCOSE BALANCE SHEET

2010/11 – 2014/15

AGRI C4

EU SUGAR BALANCE SHEETS

FINAL 2010/2011 to 2012/2013

ESTIMATE 2013/2014

FORECAST 2014/2015

update Sep-14

SUGAR AND ISOGLUCOSE

x 1000 tonnes	Final		Final		Final		Estimate		Forecast	
	2010 /11 (oct-sept)		2011/12 (oct-sept)		2012/13 (oct-sept)		2013/14 (oct-sept)		2014/15 (oct-sept)	
	EU 27		EU 27		EU 27		EU 28		EU 28	
	quota	out of quota	quota	out of quota	quota	out of quota	quota	out of quota	quota	out of quota
AVAILABILITIES										
1 Beginning stocks	1 007	0	1 068	0	1 595	0	2 557	0	2 078	0
1 1 private	1 007		1 068		1 595		2 494		2 078	
1 2 intervention	0		0		0		0		0	
2 Production	14 361	2 370	14 673	4 967	14 597	4 306	14 217	4 046	14 226	270
of which quota / out-of-quota	13 835	2 896	13 998	5 642	13 995	4 908	14 217	4 046	13 956	- 270
release out-of-quota	526	- 526	675	- 675	602	- 602	0	0	0	6 230
3 Imports	4 095	54	4 003	14	4 158	5	3 564	4	3 789	4
3 1 - as such (*)	3 568		3 498		3 635		3 000		3 225	
3 2 - in processed products	528		505		523		564		564	
4 TOTAL AVAILABLE	19 464	2 424	19 744	4 981	20 350	4 312	20 339	4 050	20 093	5 964
4 = 1 + 2 + 3										
OUTLETS										
5 Consumption/disappearance	17 213	1 539	16 915	2 114	16 575	2 302	16 930	2 150	16 967	2 150
		637 indust. 902 bioeth.		626 indust. 1 488 bioeth.		801 indust. 1 501 bioeth.		800 indust. 1 350 bioeth.		800 indust. 1 350 bioeth.
6 Exports	1 183	735	1 234	2 065	1 281	1 335	1 331	1 400	1 331	1 400
6 1 - as such (**)	45		58		63		68		68	
6 2 in processed products	1 138		1 176		1 218		1 263		1 263	
7 Ending stocks	1 068	150 carry forward	1 595	802 carry forward	2 494	674 carry forward	2 078	500	1 796	2 414
7 1- private	1 068		1 595		2 494		2 078		1 796	
(of which stock declared by manufacturers and refiners)	(1 068)									
7 2 - intervention	0		0		0		0		0	
8 TOTAL OUTLETS	19 464	2 424	19 744	4 981	20 350	4 312	20 339	4 050	20 093	5 964
8 = 5 + 6 + 7 = 4										

(*) Imports as such : physical imports for final balance sheet; issued import licences for forecast.

(**) Exports as such: physical exports for final balance sheet; export licences issued during the current and previous MY for estimate



*Thank you
for your attention*