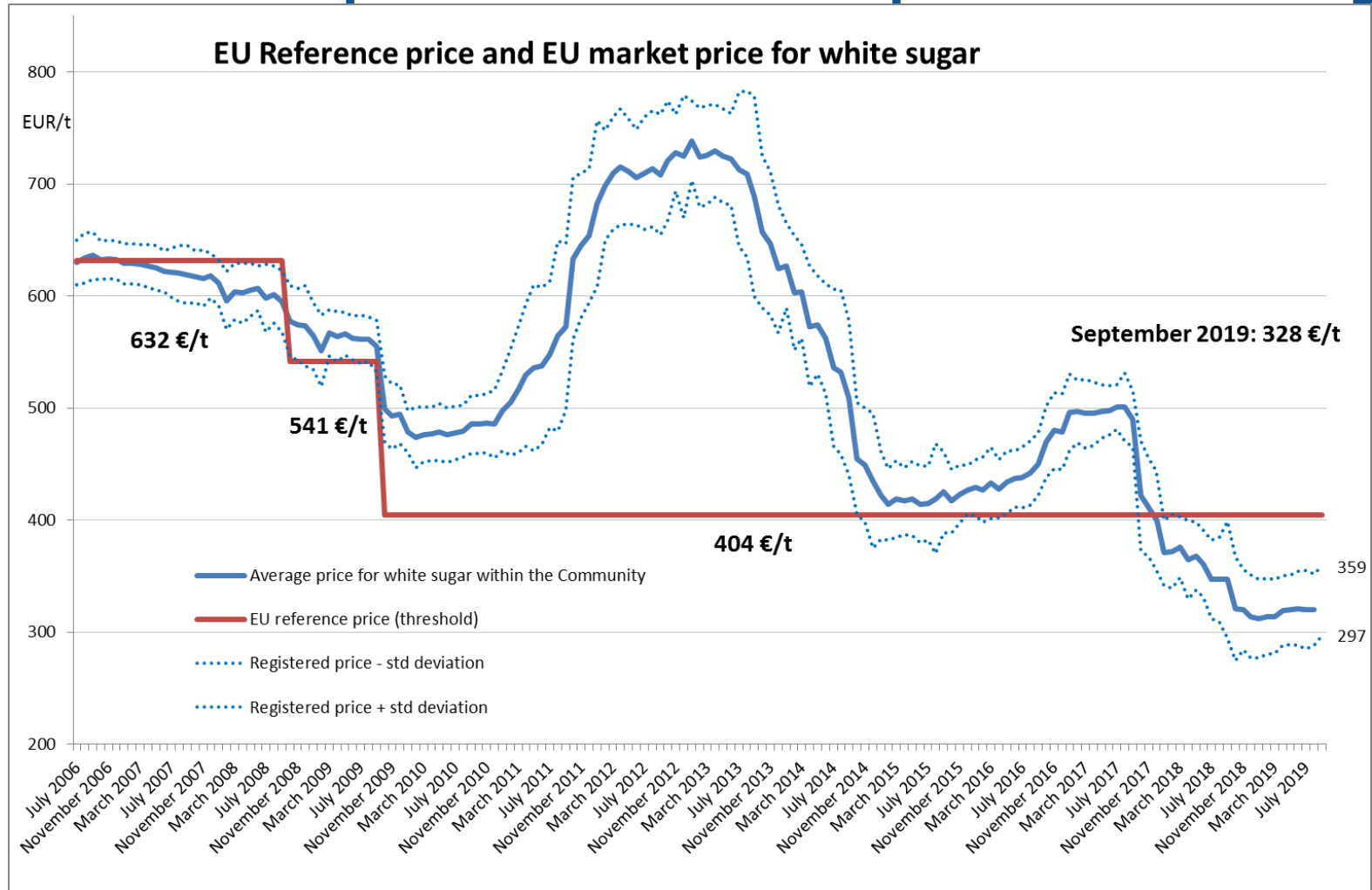


Sugar Price reporting

AGRI G 4
Civil Dialogue Group - Arable Crops
Sugar sector
19 November 2019

EU Reference price and EU market price for white sugar



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

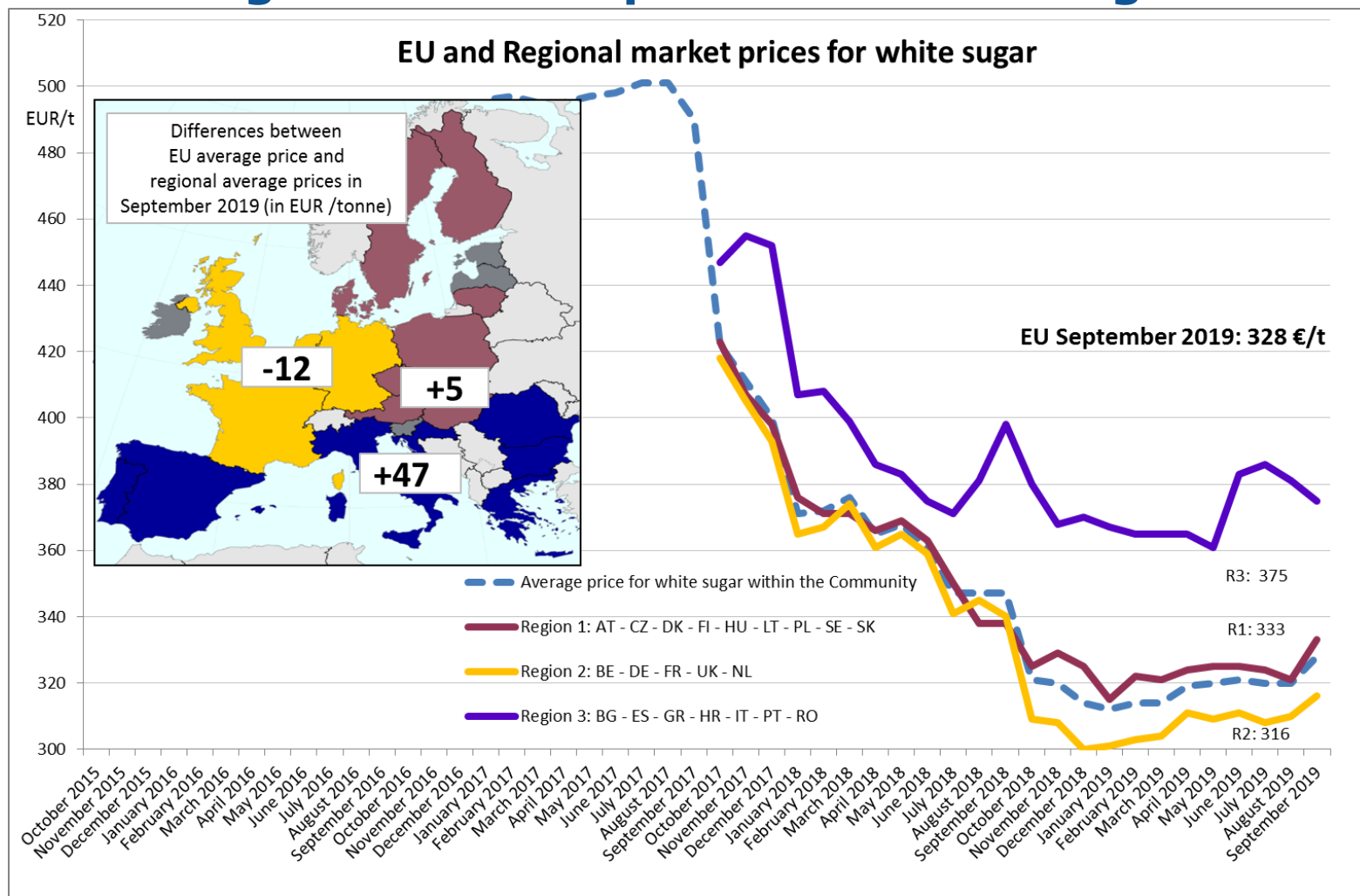
Region 1: AT – CZ – DK – FI – HU – LT – PL – SE – SK

Region 2: BE – DE – FR – UK – NL

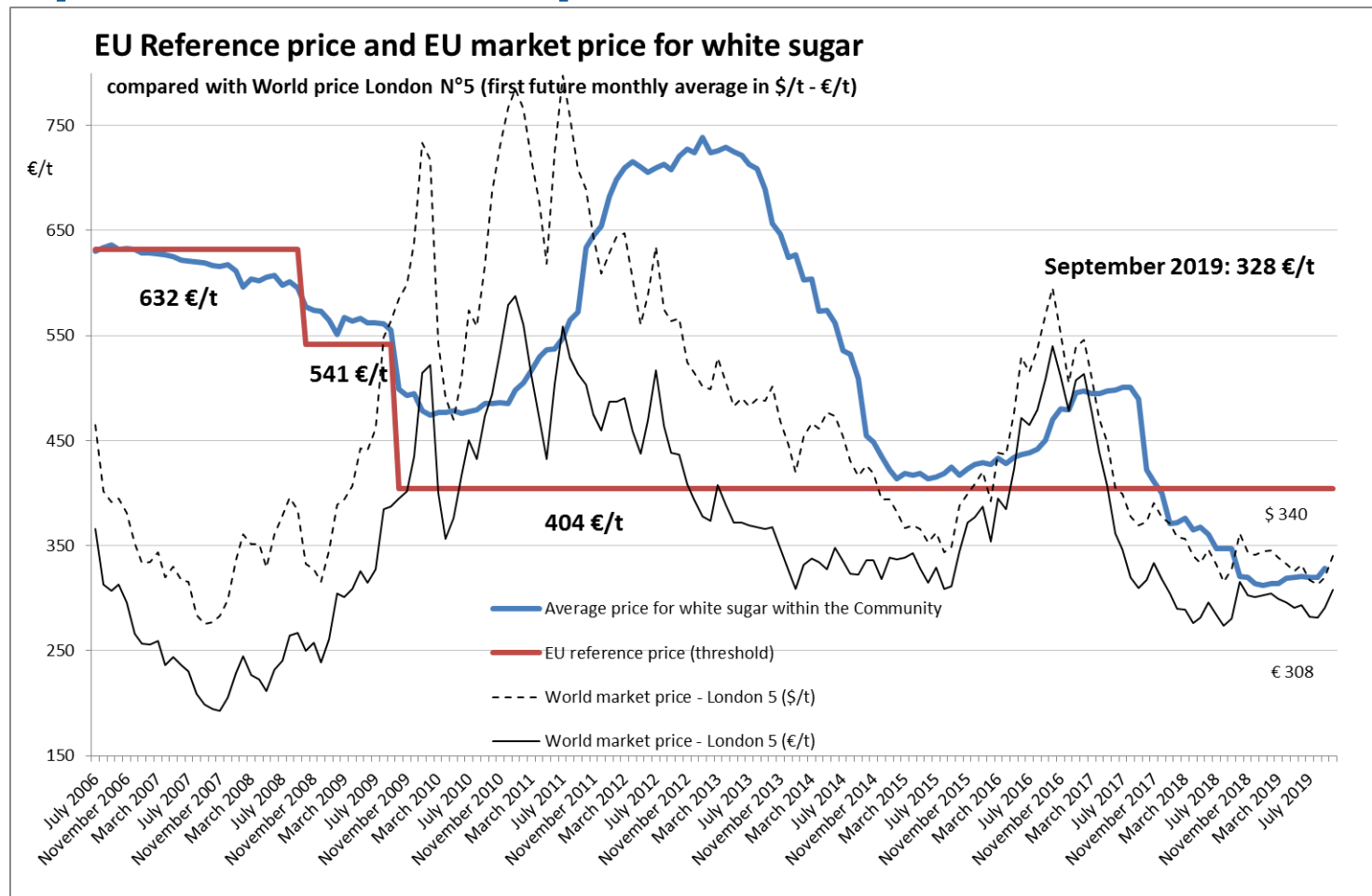
Region 3: BG – ES – GR – HR – IT – PT – RO

in €/t	EU		Region 1	Region 2	Region 3
	average (1)	std dev (2)	average (1)	average (1)	average (1)
September 2018	347	52	338	340	398
October 2018	321	46	325	309	380
November 2018	320	36	329	308	368
December 2018	314	37	325	300	370
January 2019	312	35	315	301	367
February 2019	314	34	322	303	365
March 2019	314	33	321	304	365
April 2019	319	31	324	311	365
May 2019	320	31	325	309	361
June 2019	321	33	325	311	383
July 2019	320	35	324	308	386
August 2019	320	32	321	310	381
September 2019	328	31	333	316	375

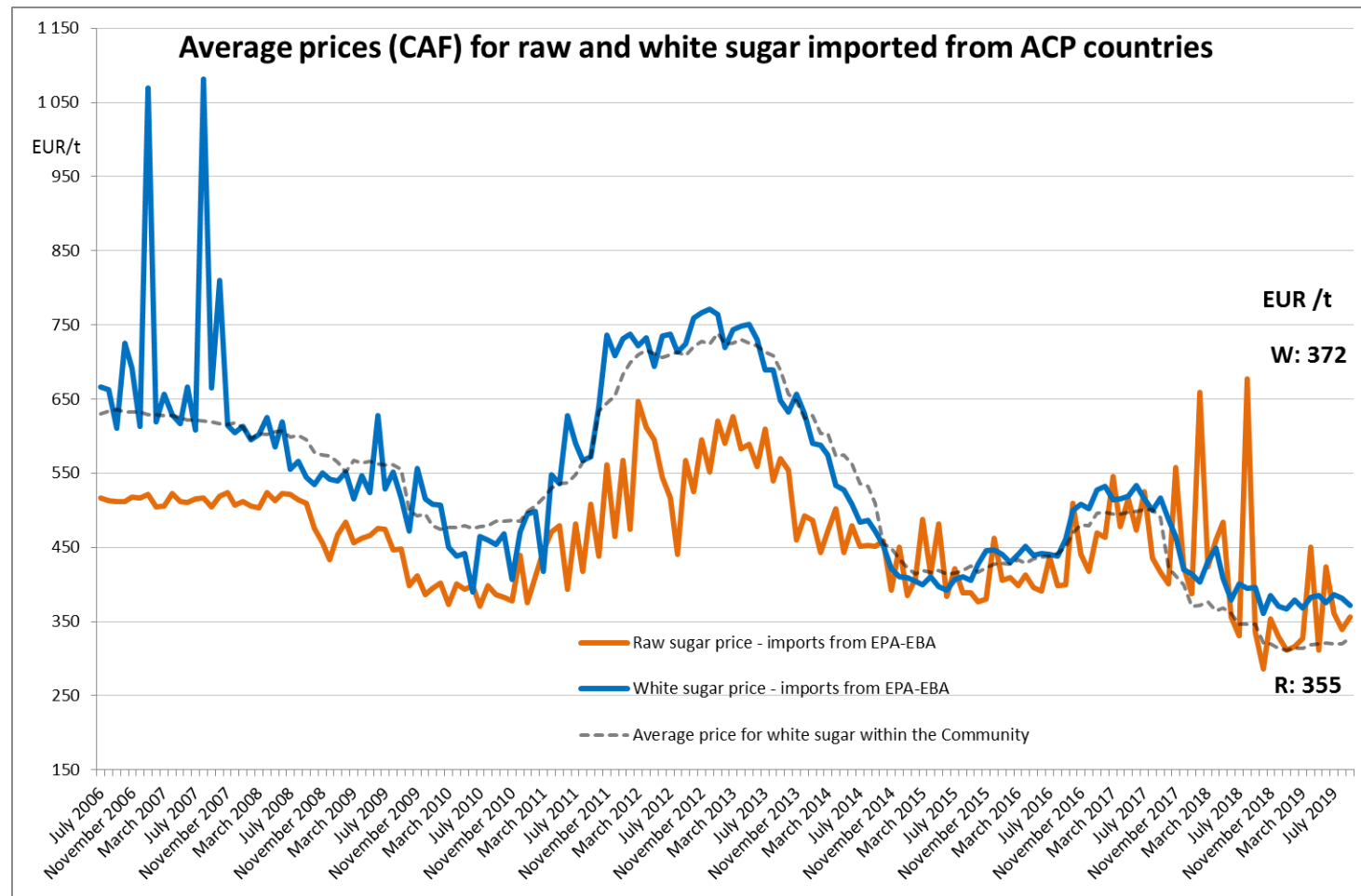
EU and Regional market prices for white sugar



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



ACP average import price



Sugar Beet Price



AGRICULTURE AND RURAL DEVELOPMENT
ISAMM CM

ISAMM CM > Communication Preview

Average price for sugar beet : *R 2017/1185 Art 12 (a) - Annex II 1.*

Reference period: 1/10/2017 to 30/09/2018

EU weighted average price: EUR 25.7/t

METHODOLOGY

FOR THE ESTABLISHMENT OF SUGAR BEET PRICES

The price shall be notified as follows:

- one weighted average price per marketing year;
- in national currency, per tonne;
- taking account of all of the quantities purchased by sugar beet processors from beet growers in respect of the marketing year for which the price is notified;
- converted to 16% equivalent sugar content.

The total corresponding quantity of sugar beet shall be notified in tonnes.

Sugar Trade statistics

AGRI G 4

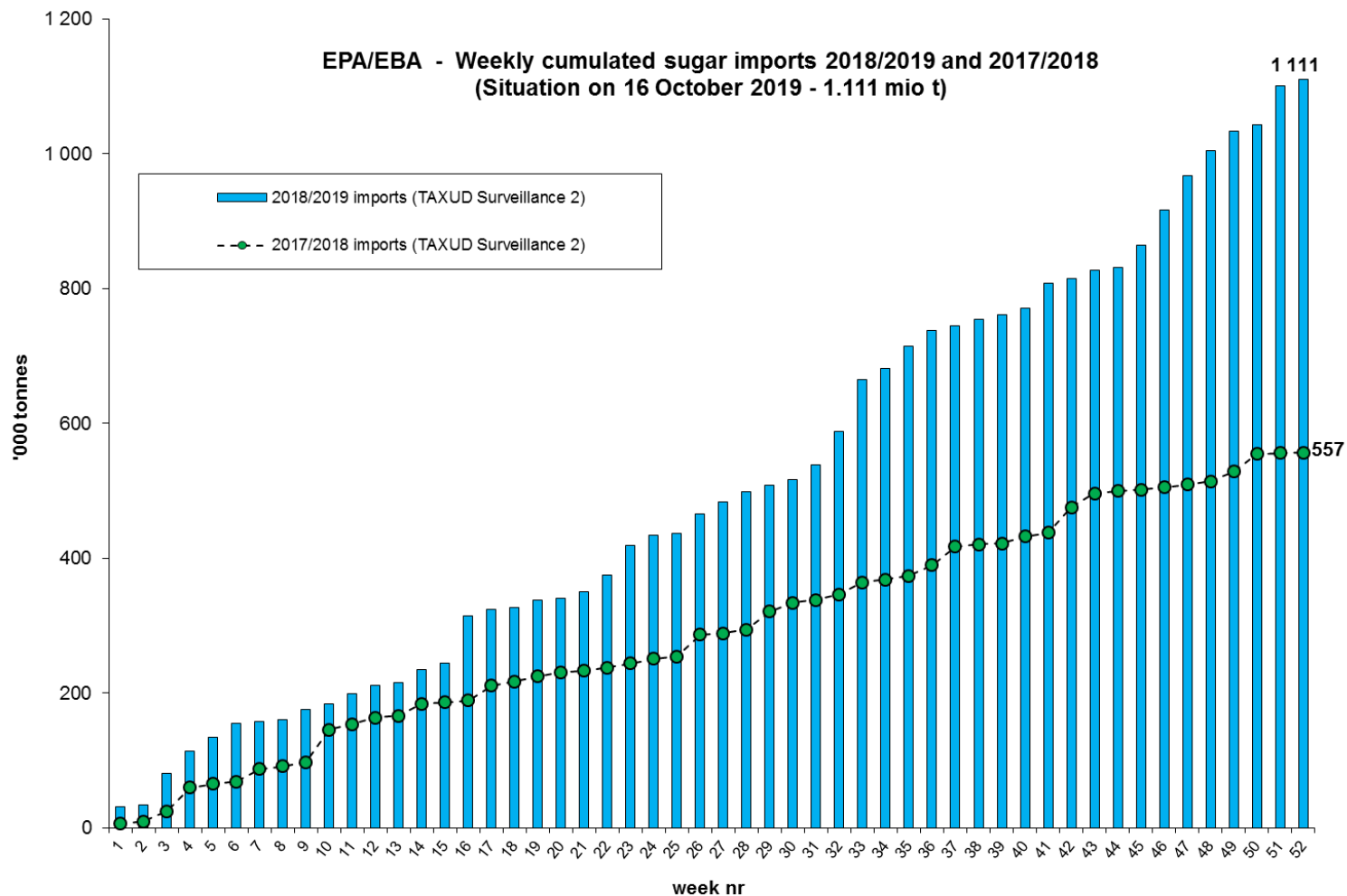
Civil Dialogue Group - Arable Crops

Sugar sector

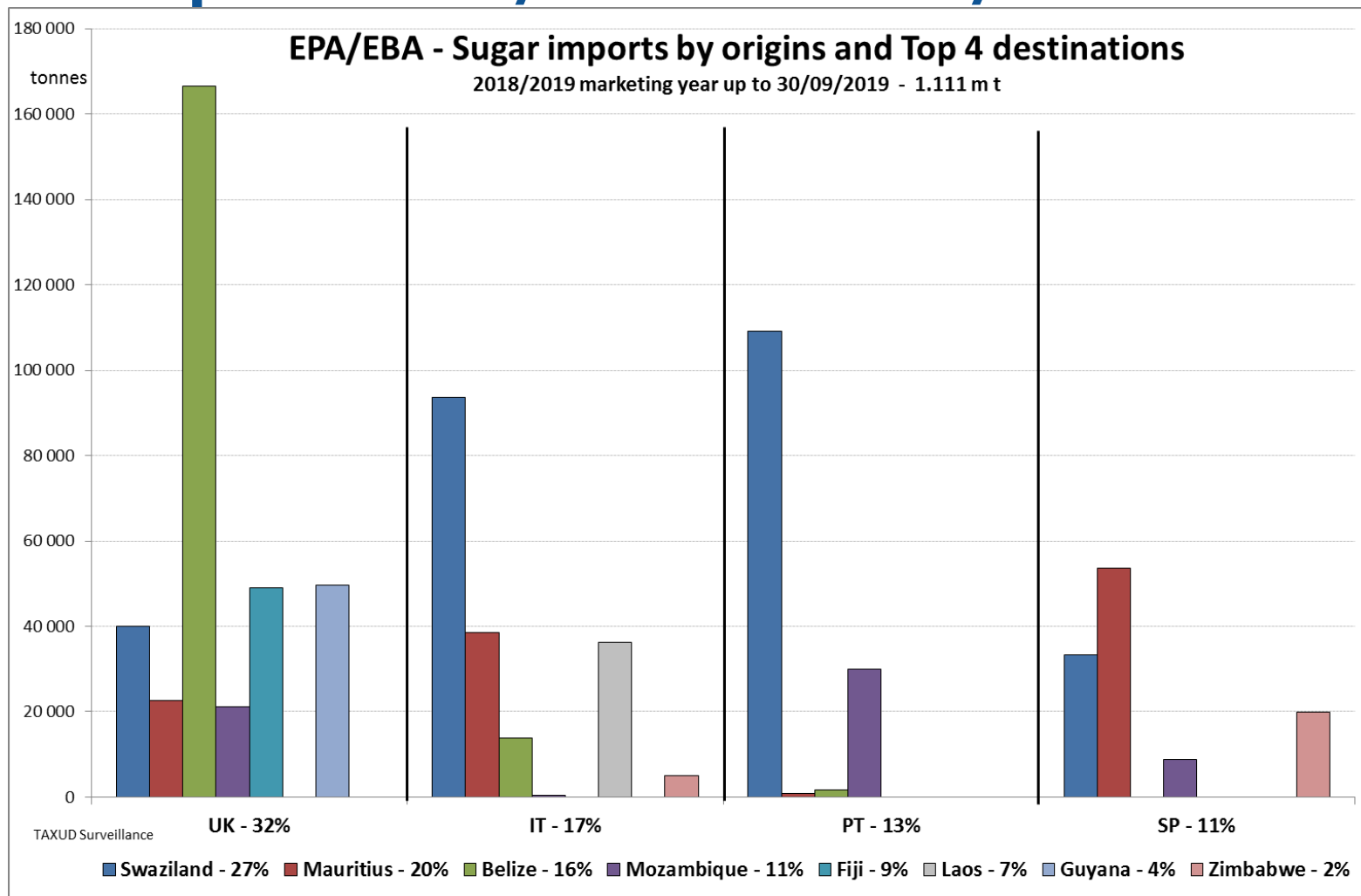
19 November 2019

EU Sugar Preferential Imports

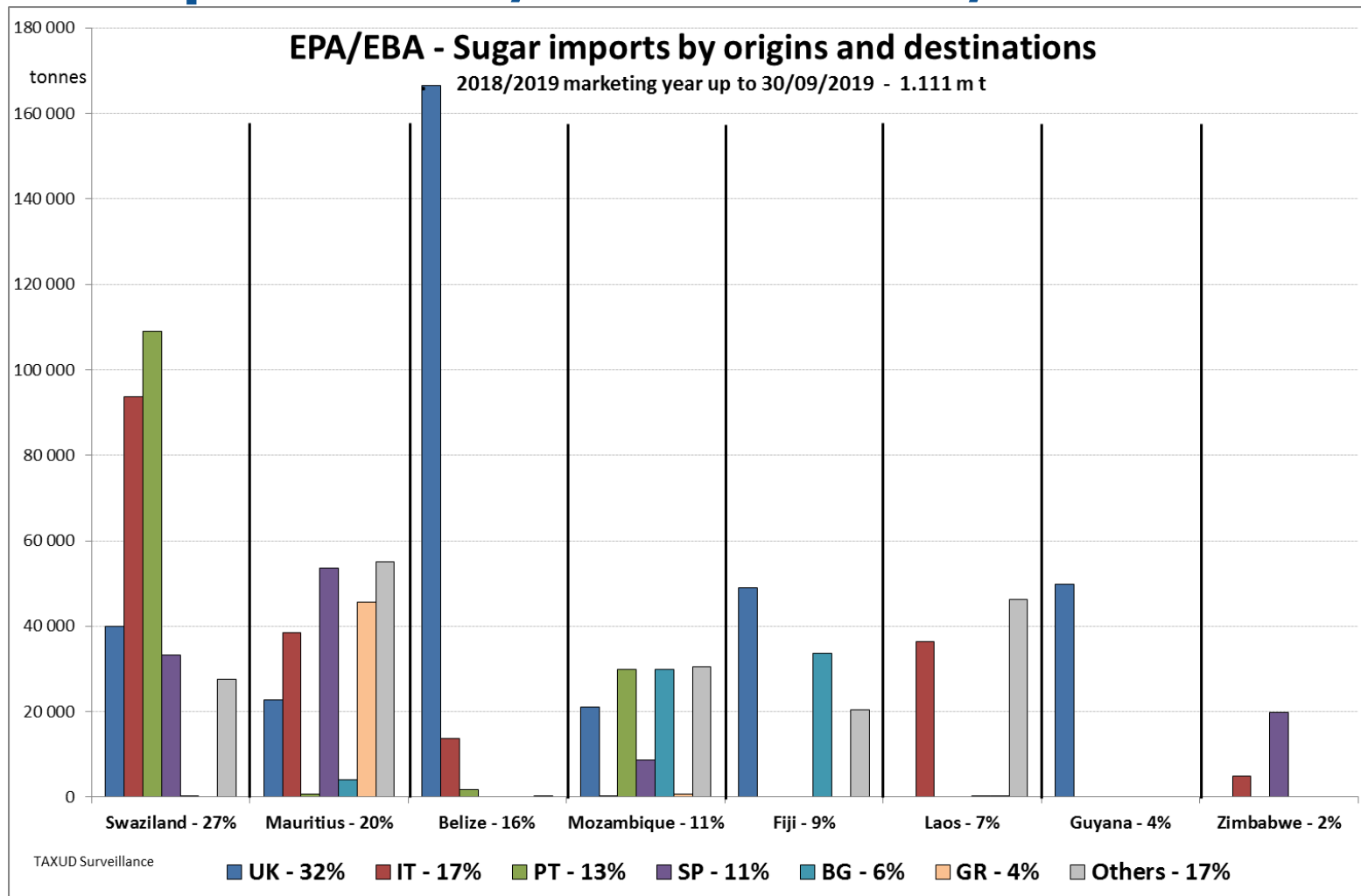
1. Imports EPA / EBA in 2018/2019



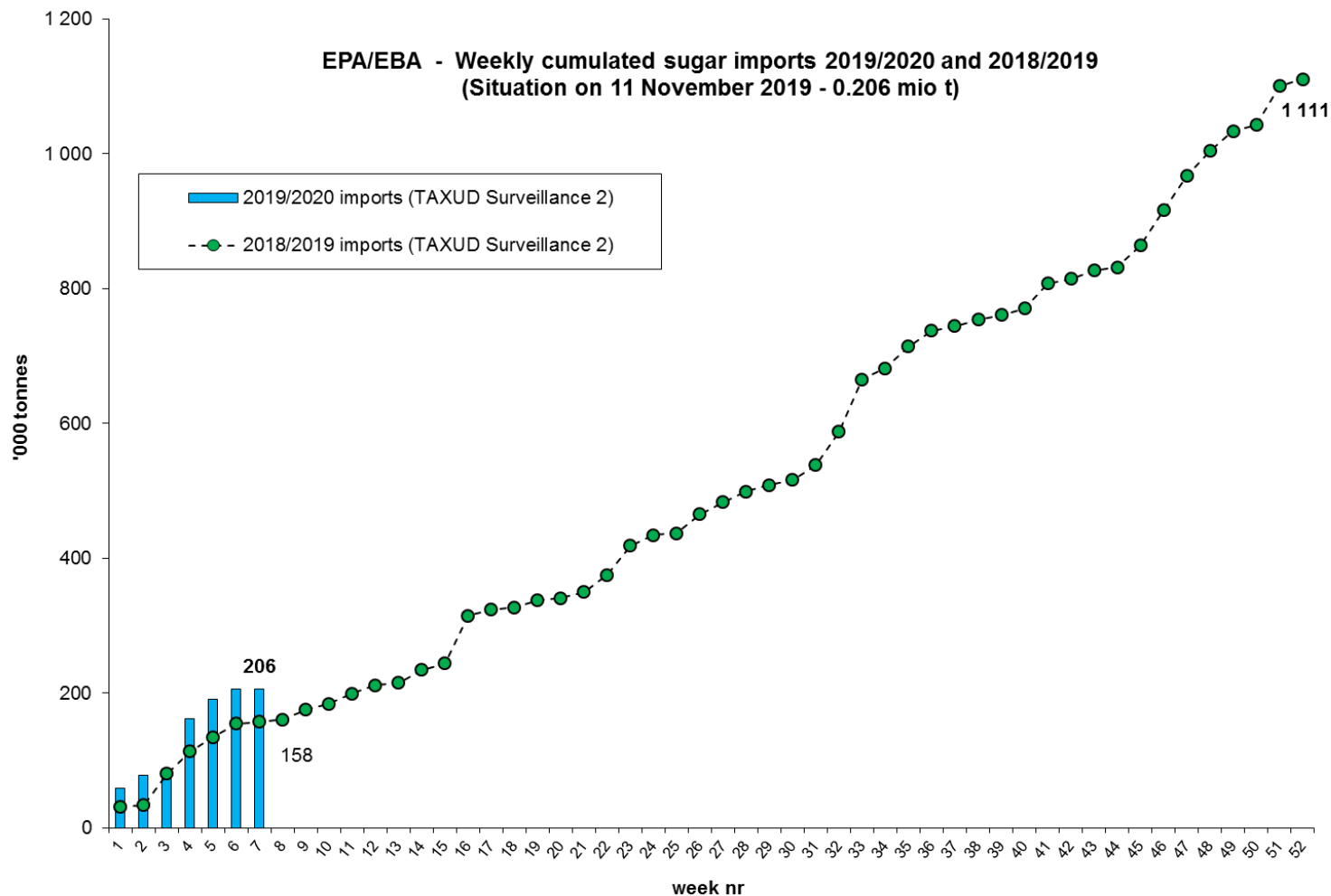
1. Imports EPA / EBA in 2018/2019



1. Imports EPA / EBA in 2018/2019

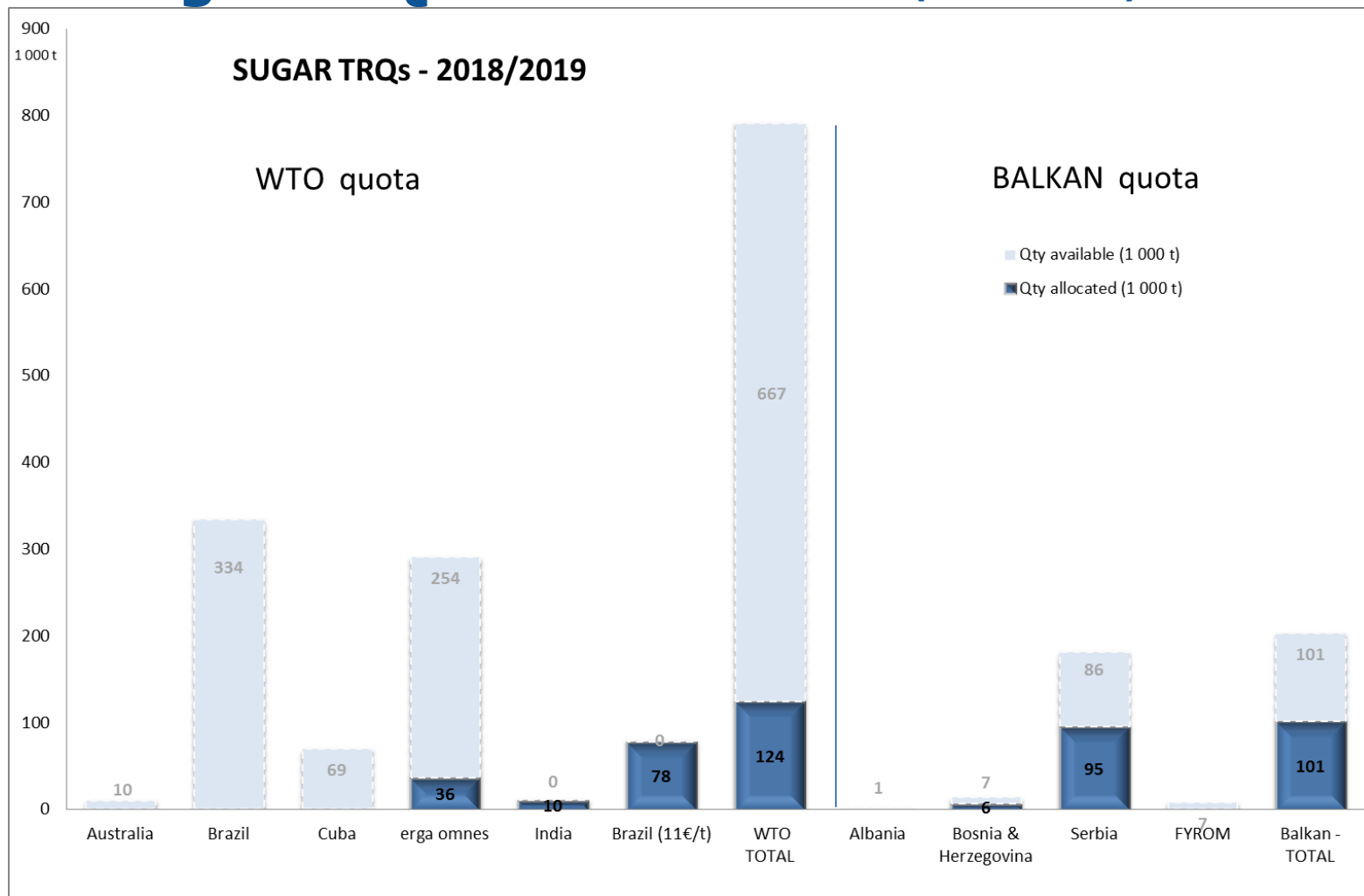


1. Imports EPA / EBA in 2019/2020

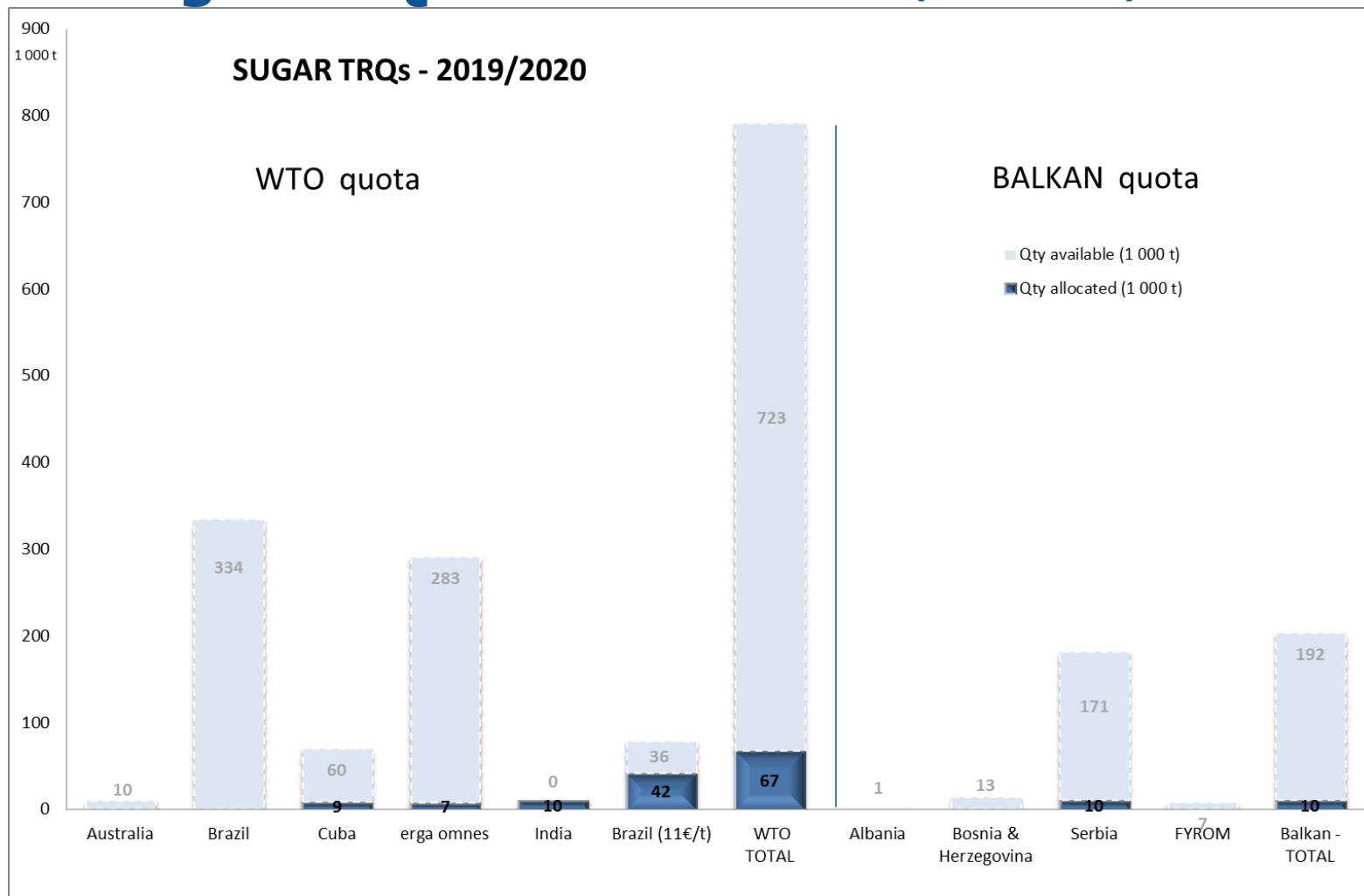


Source: DG TAXUD - DG AGRI

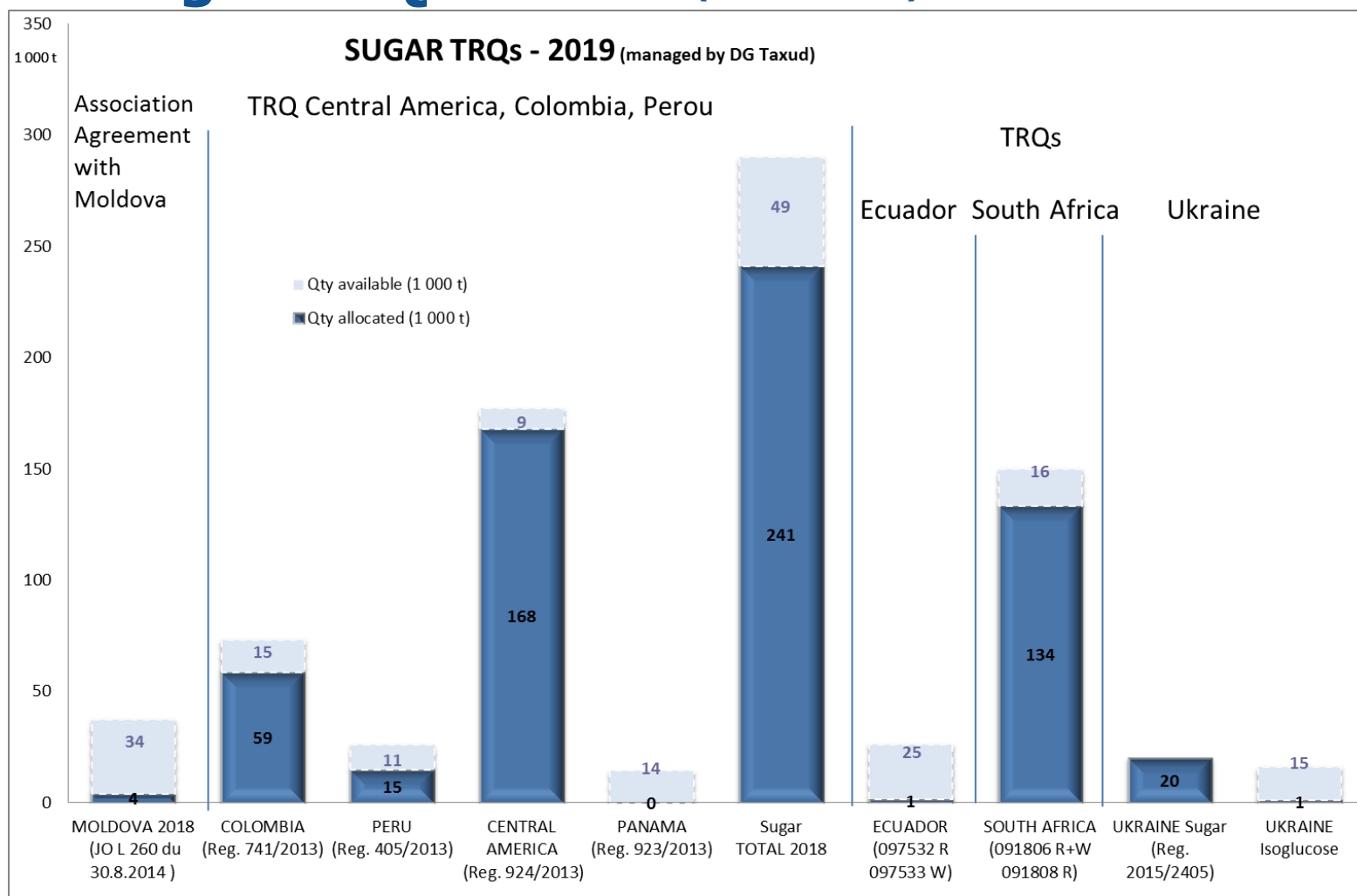
2. Sugar TRQs 2018-2019 (20/10/2019)



2. Sugar TRQs 2019-2020 (20/10/2019)



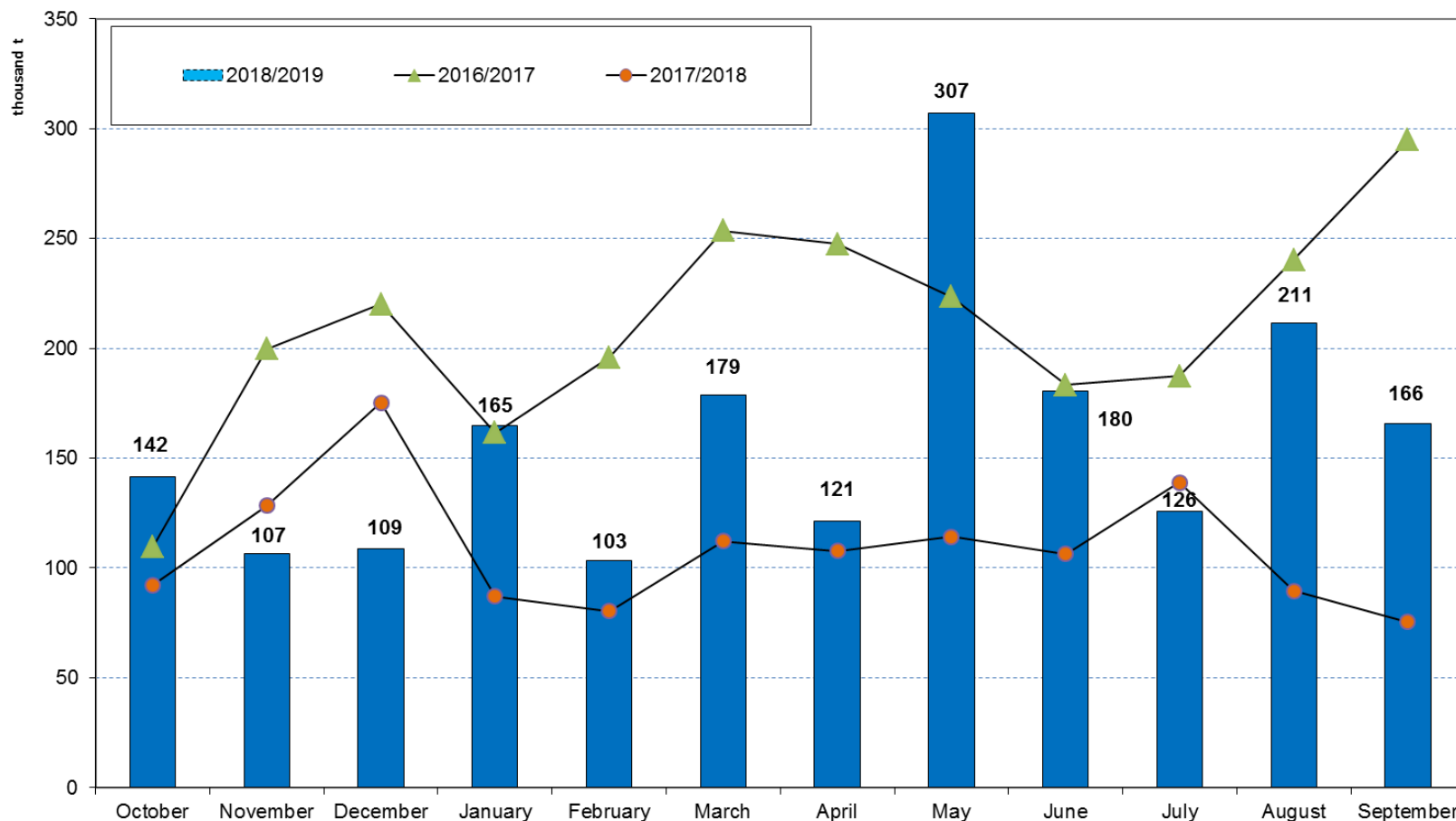
2. Sugar TRQs 2019 (14/11/2019)



EU Sugar Imports

3. EU Total imports

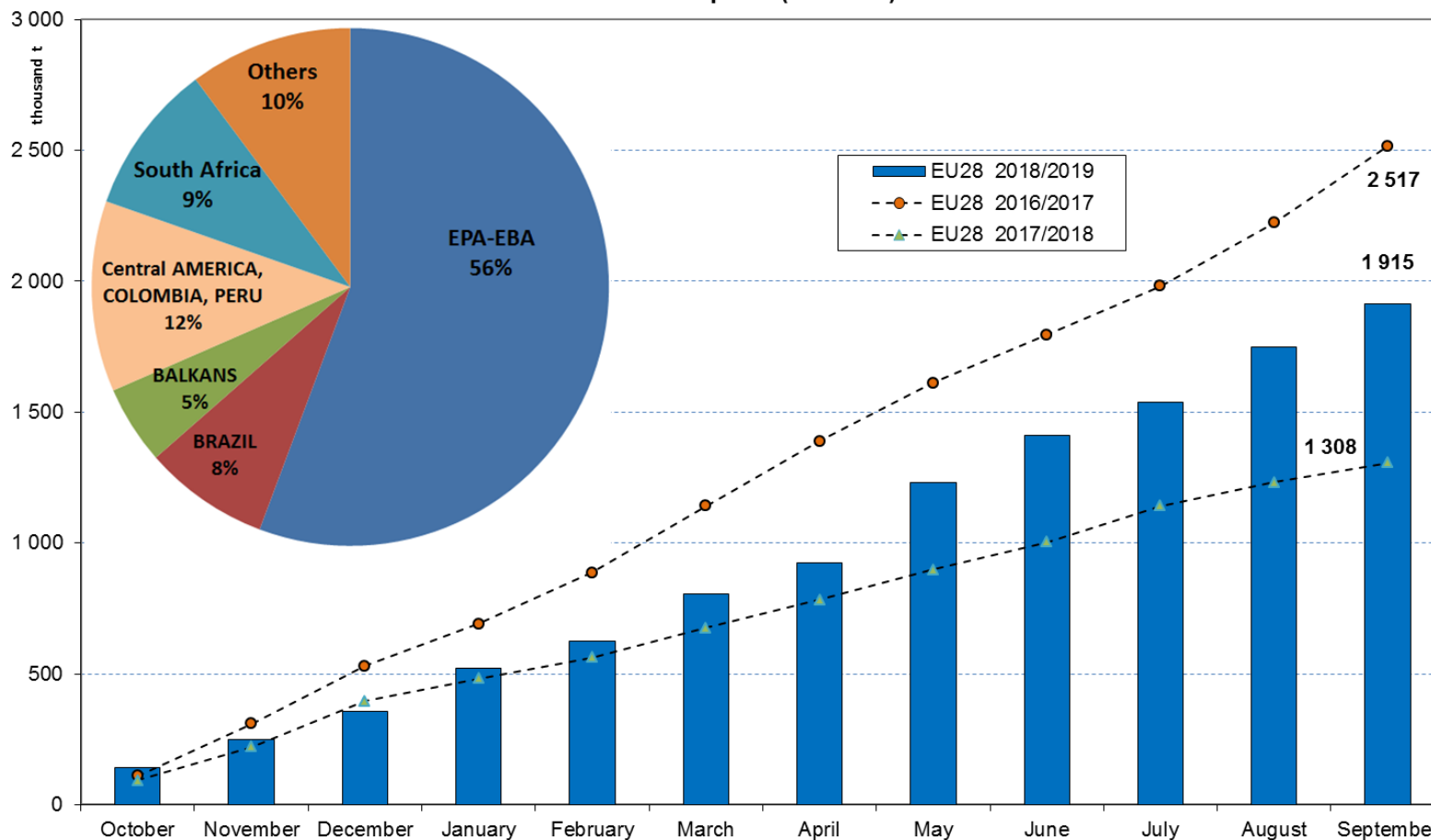
EU Monthly sugar imports (CN 1701)



Sources: EUROSTAT - DG TAXUD

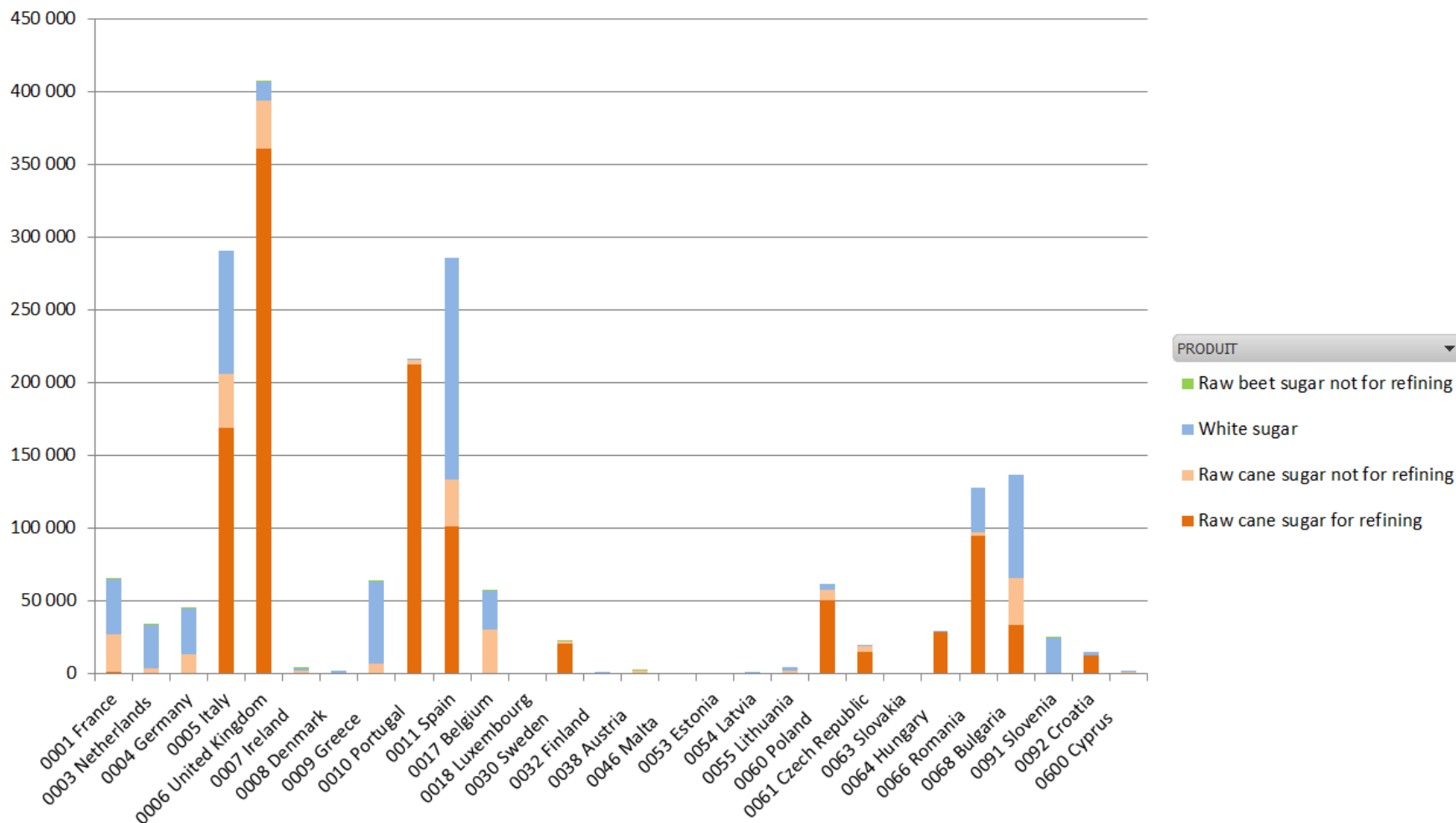
3. EU Total imports

EU cumulated imports (CN 1701)



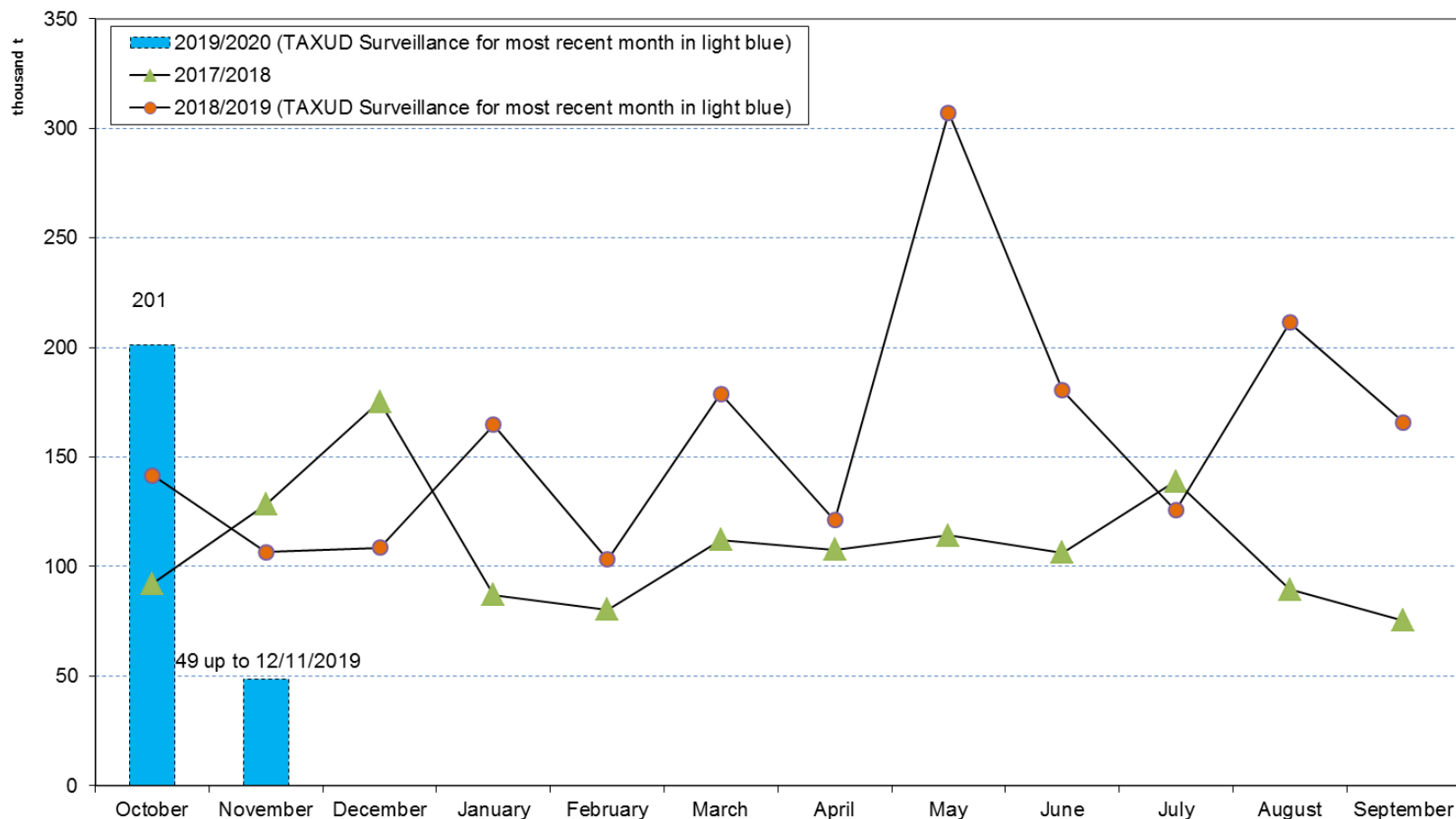
Source: EUROSTAT

3. EU Total imports (2018/2019 – 1.915 m t)



3. EU Total imports

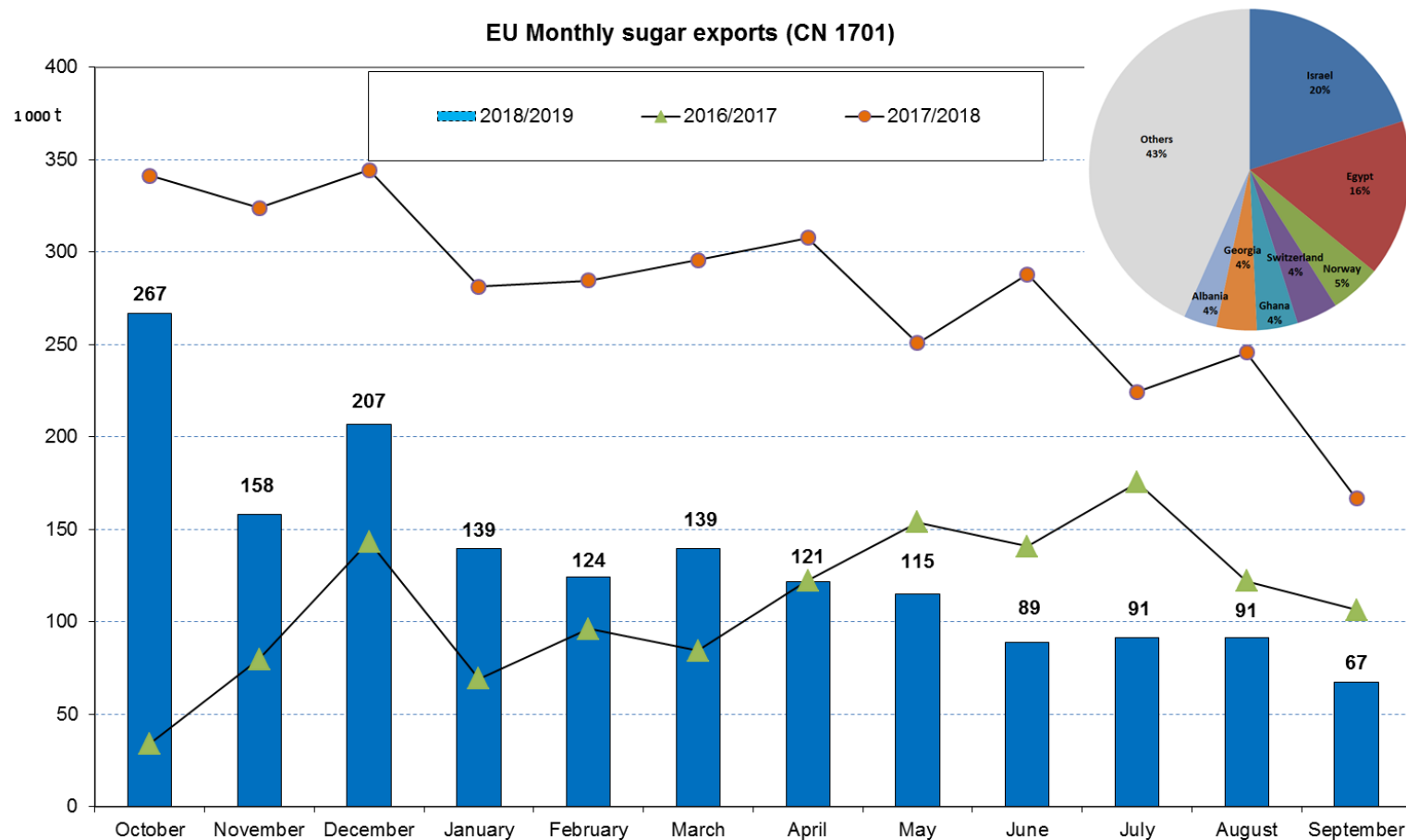
EU Monthly sugar imports (CN 1701)



Sources: EUROSTAT - DG TAXUD

EU Sugar Exports

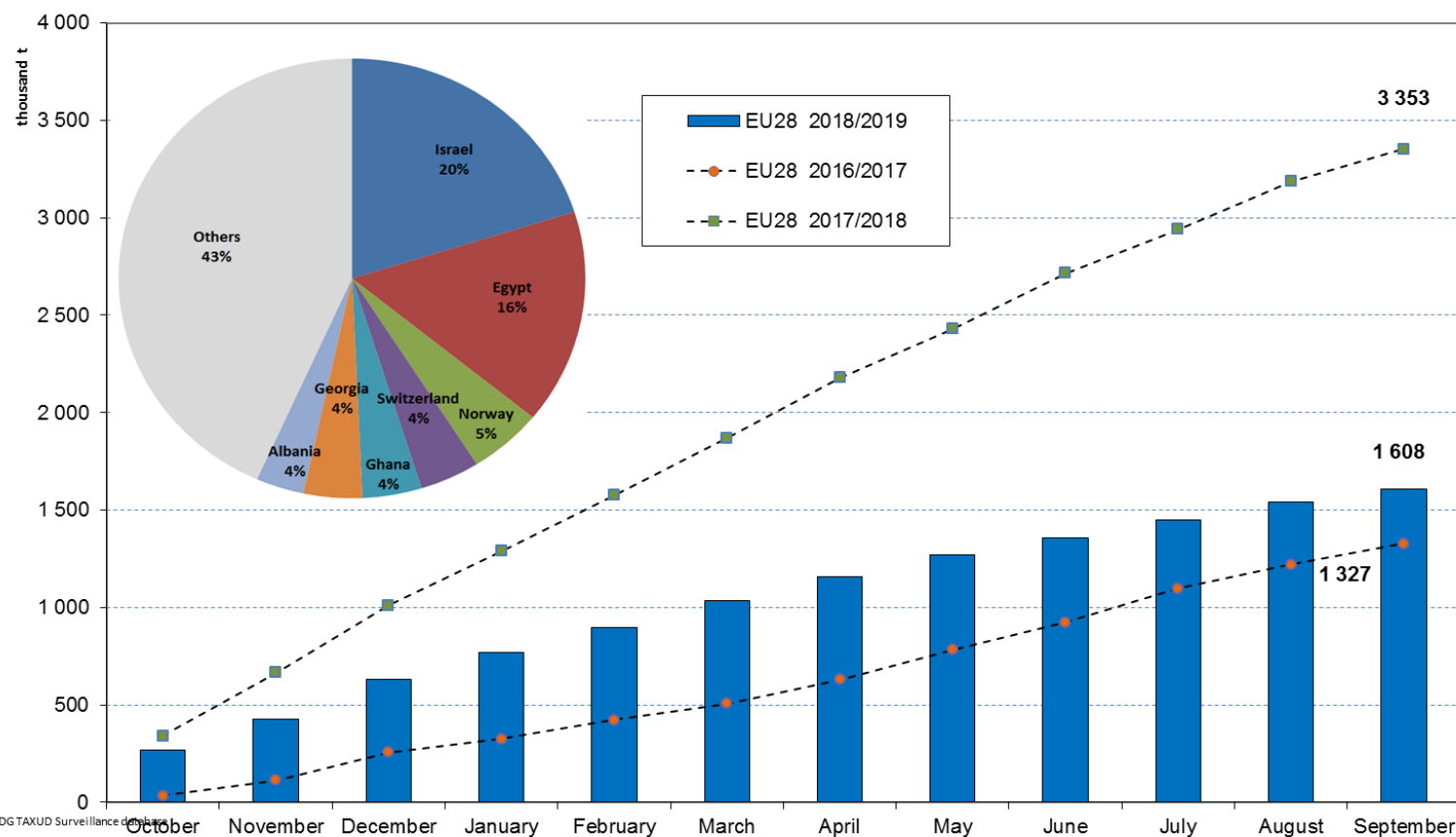
4. EU Total exports



Source: EUROSTAT - DG TAXUD

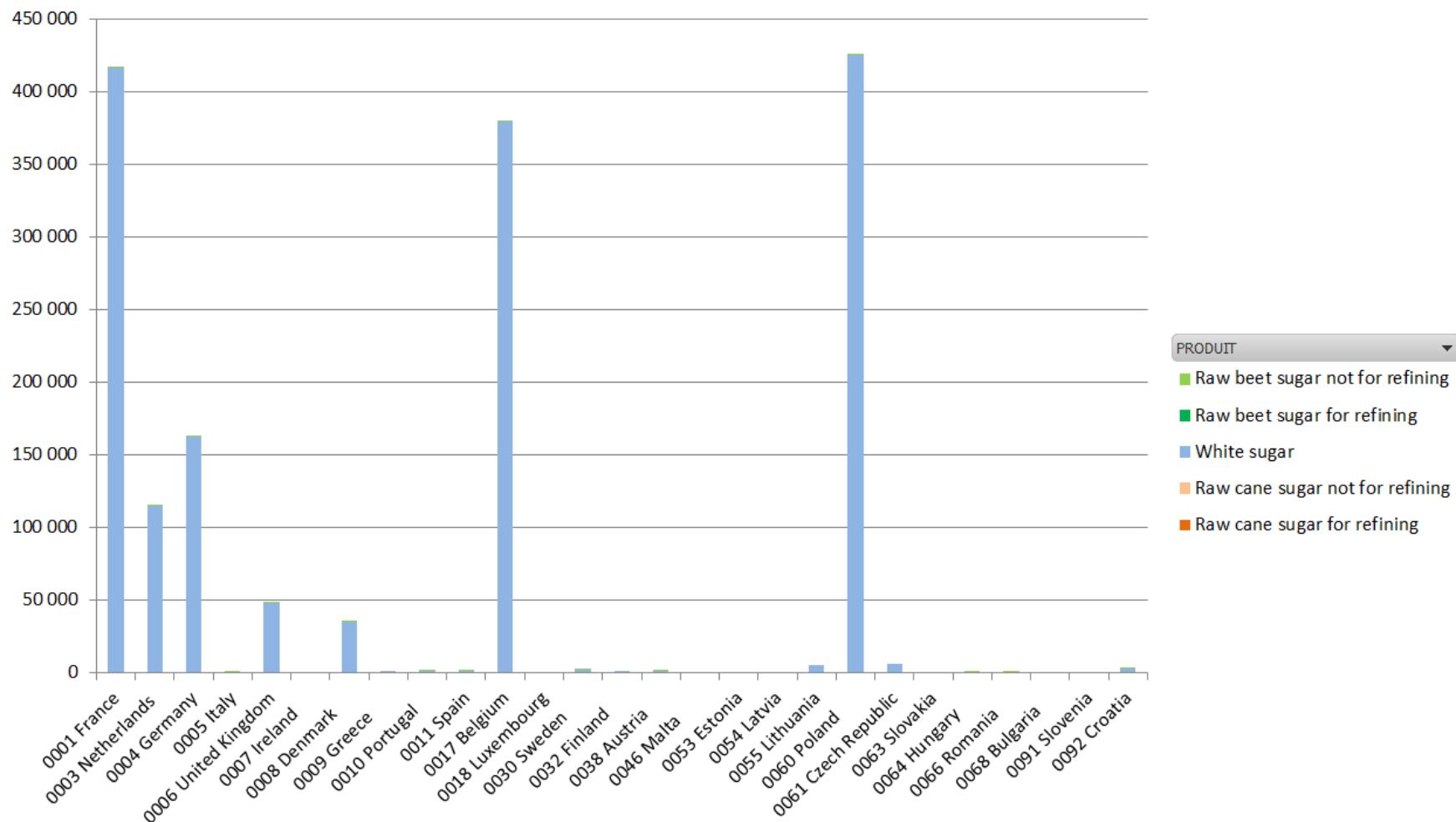
4. EU Total exports

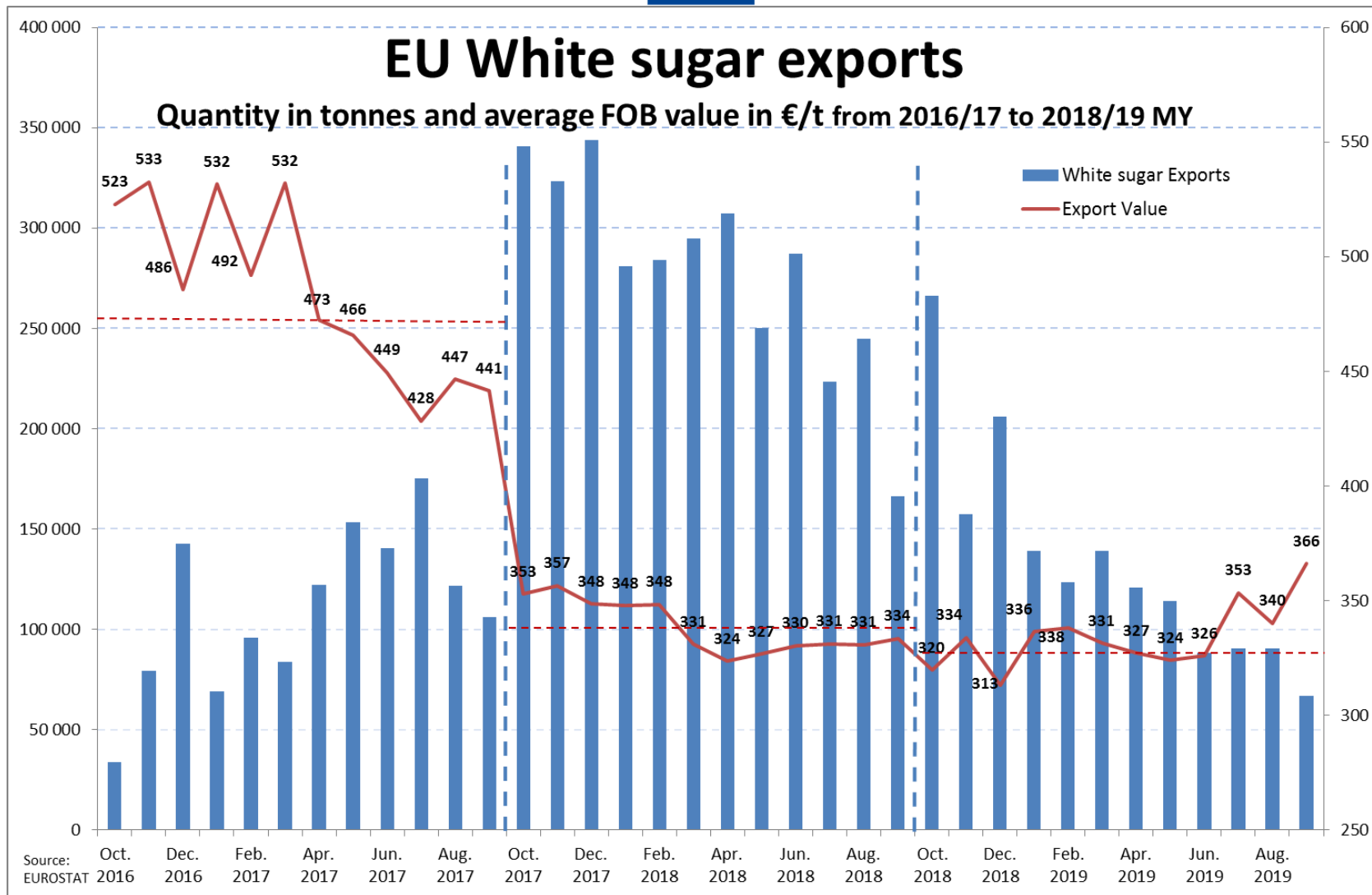
EU cumulated exports (CN 1701)



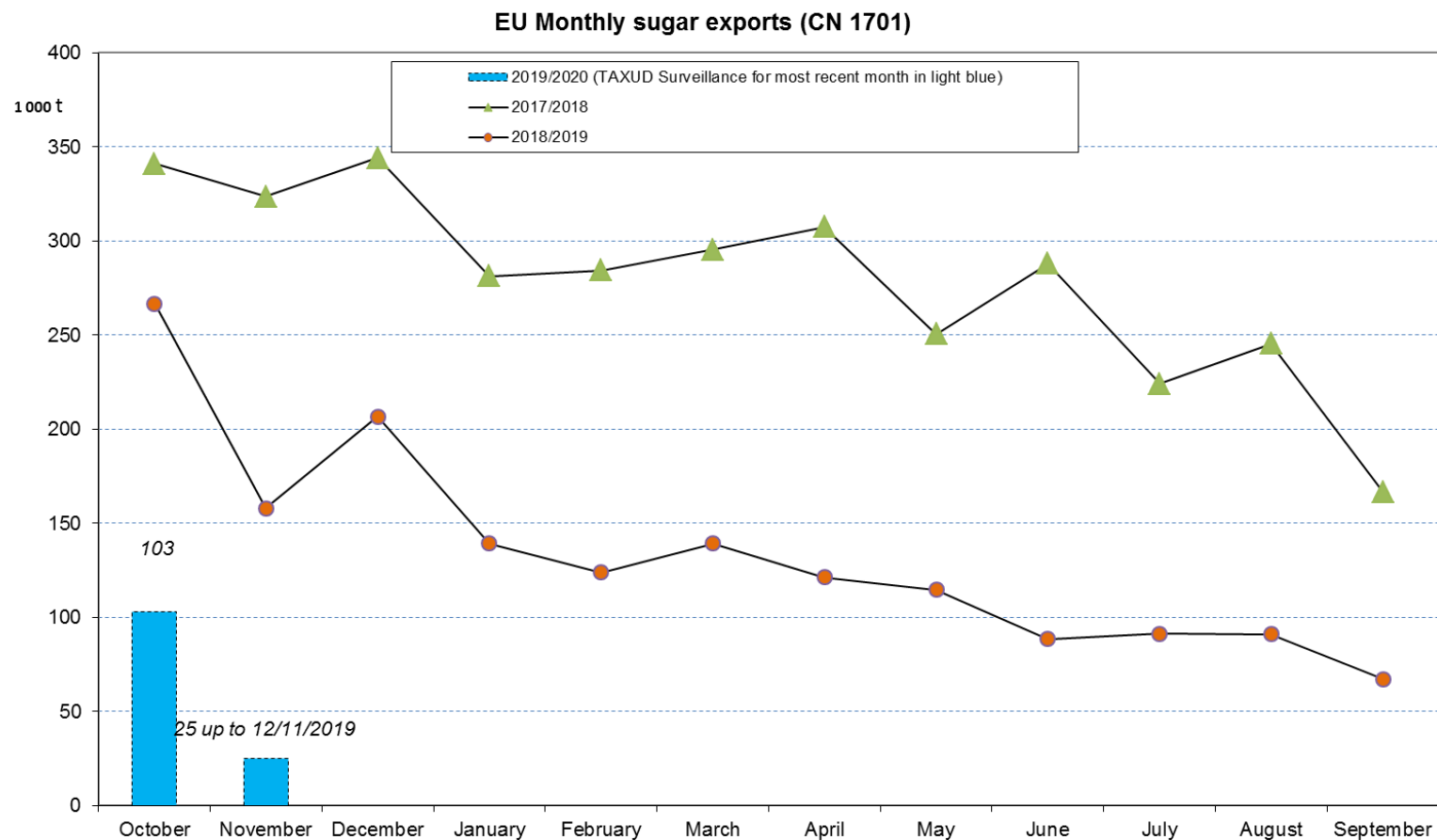
DG TAXUD Surveillance des marchés
Source: EUROSTAT

4. EU Total exports (2018/2019 – 1.608 m t)





4. EU Total exports

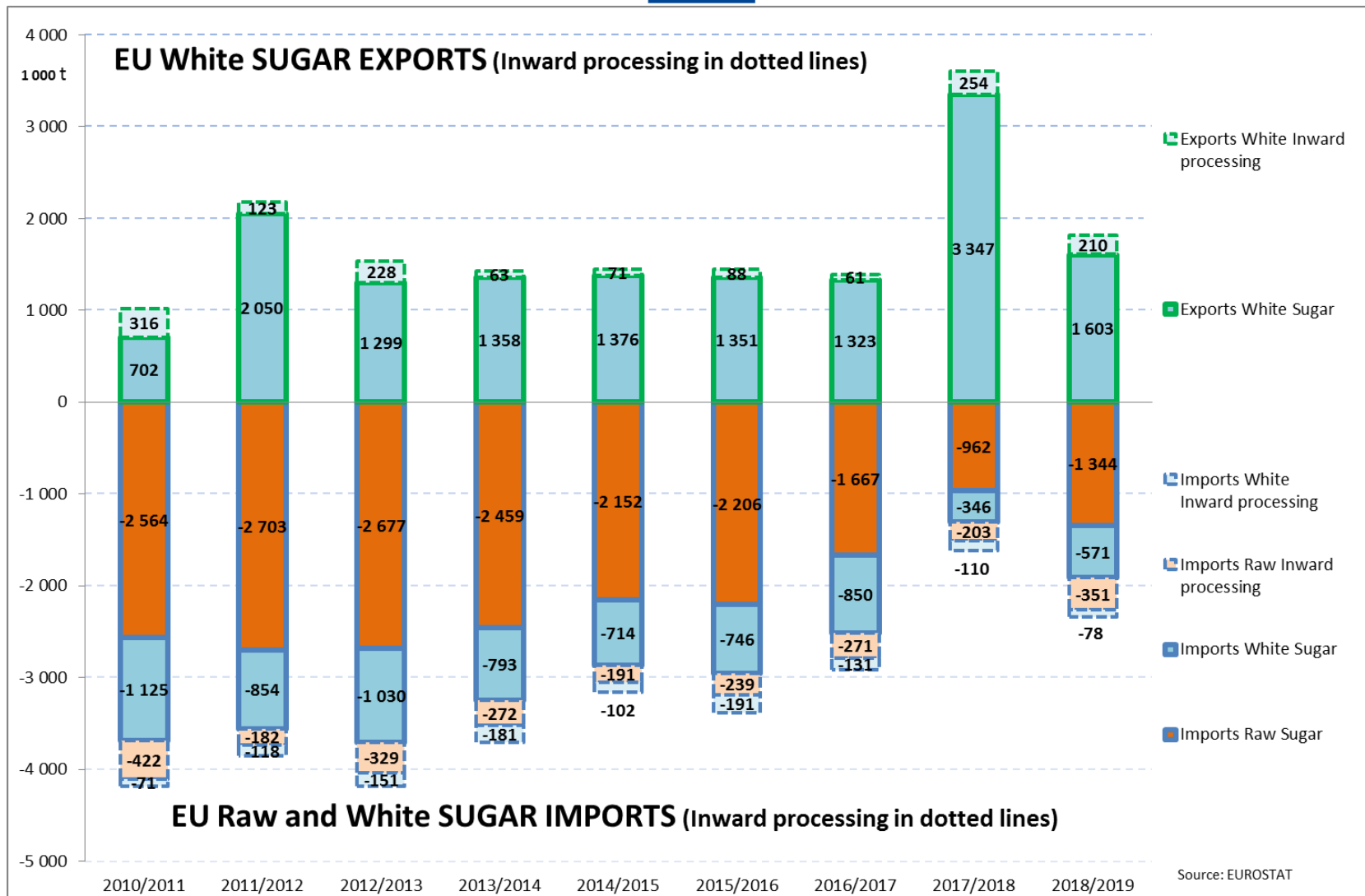


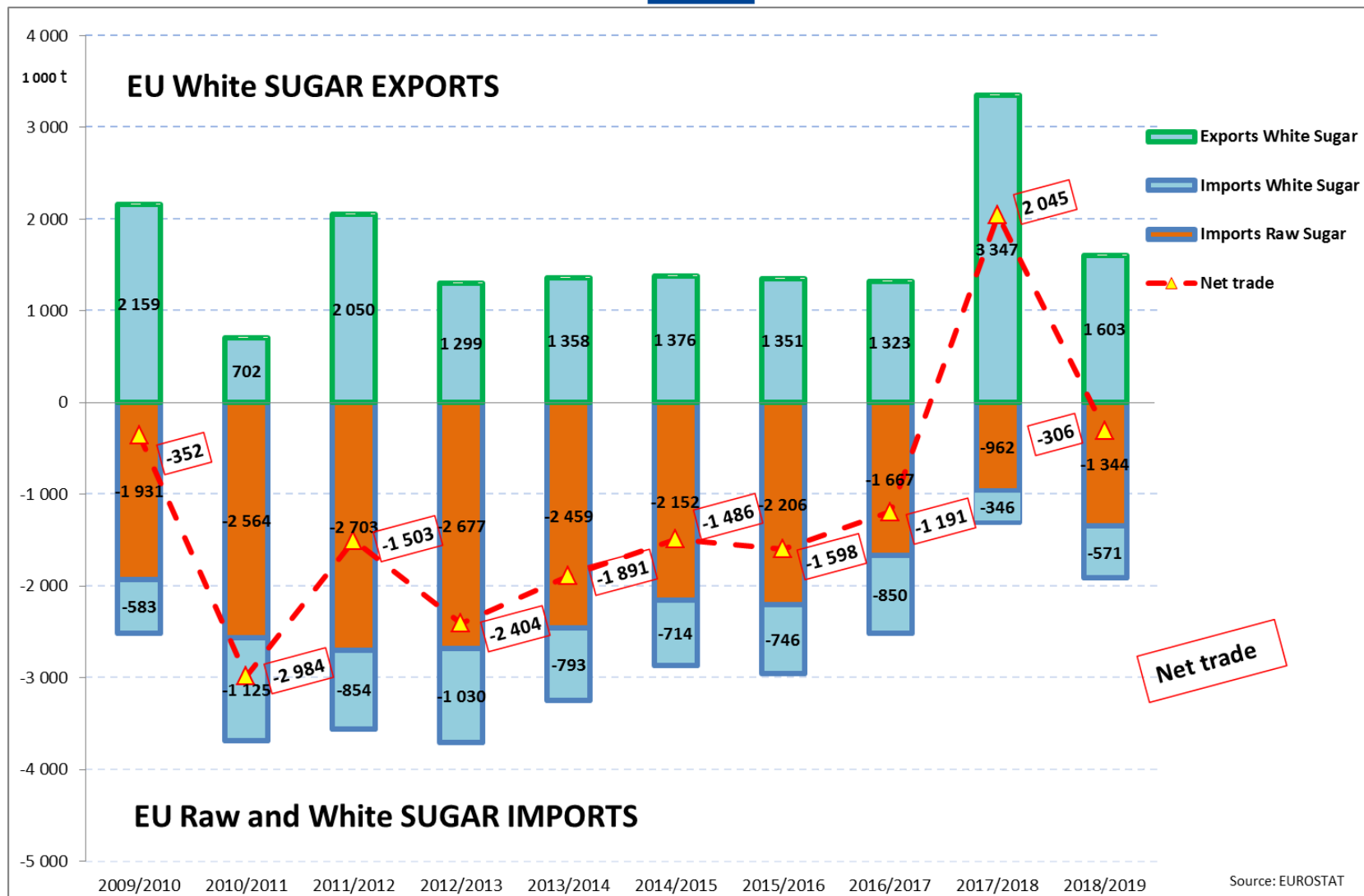
Source: EUROSTAT - DG TAXUD

EU Sugar Trade



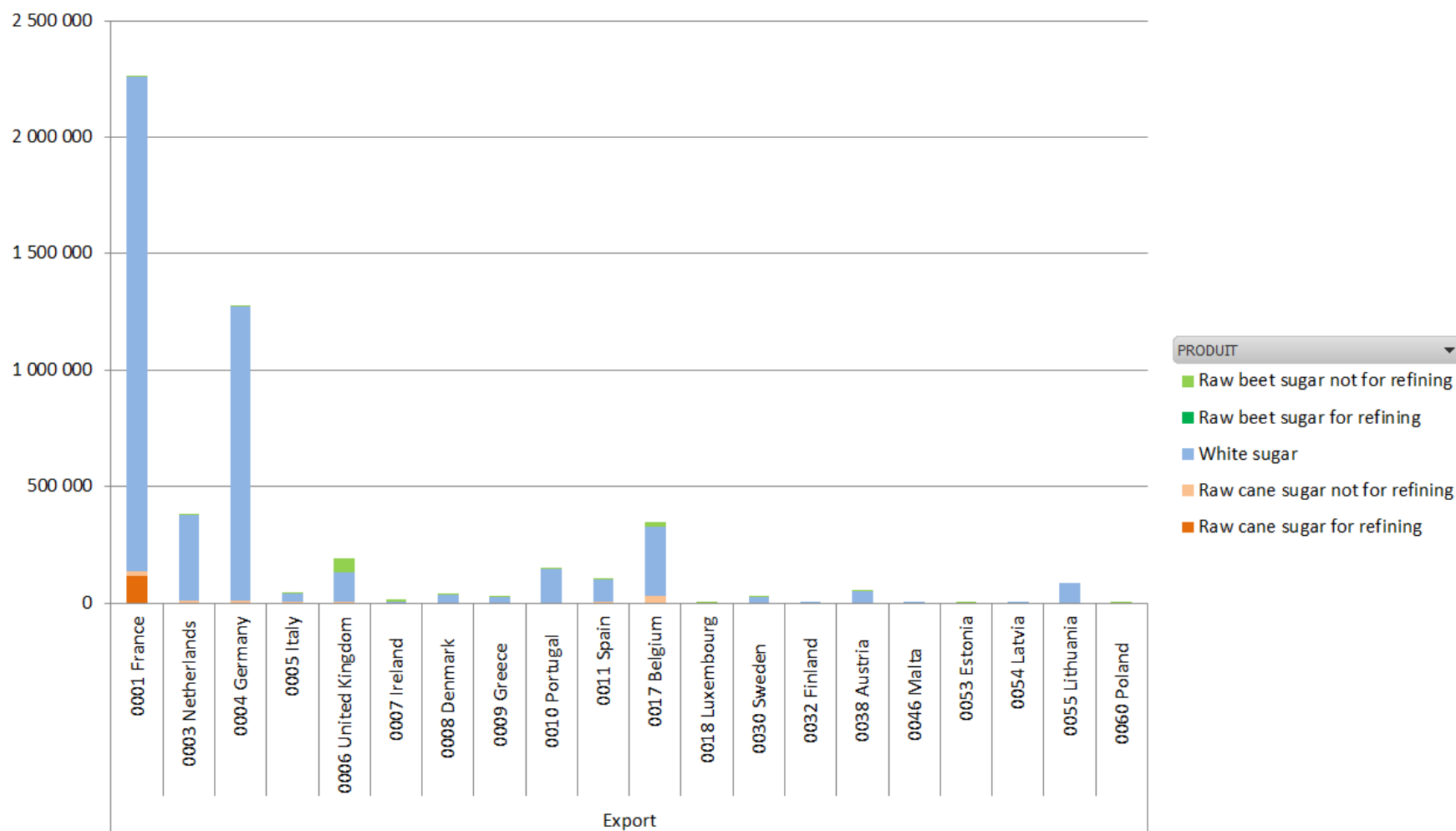
European
Commission



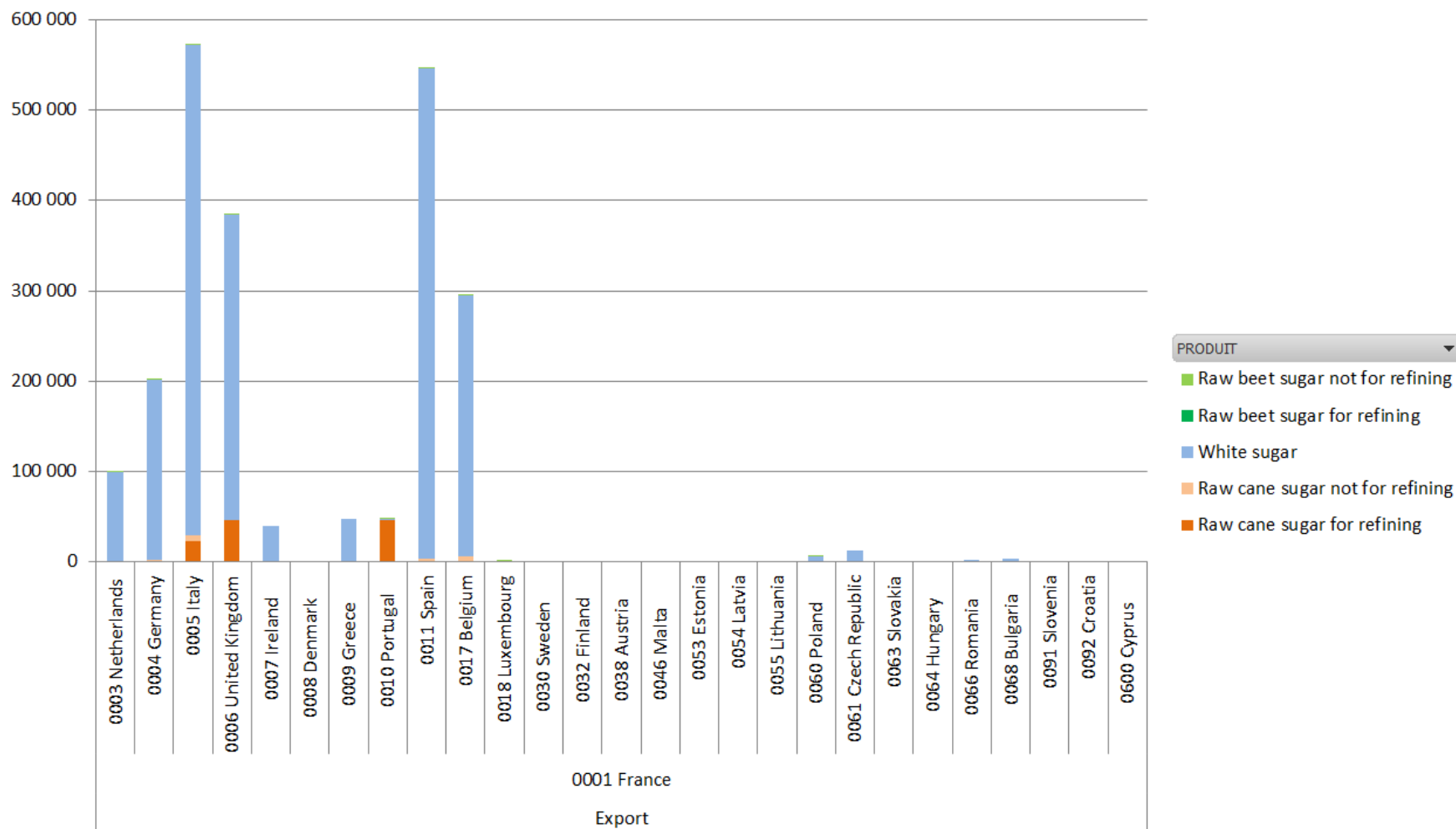


Intra - EU trade Sugar

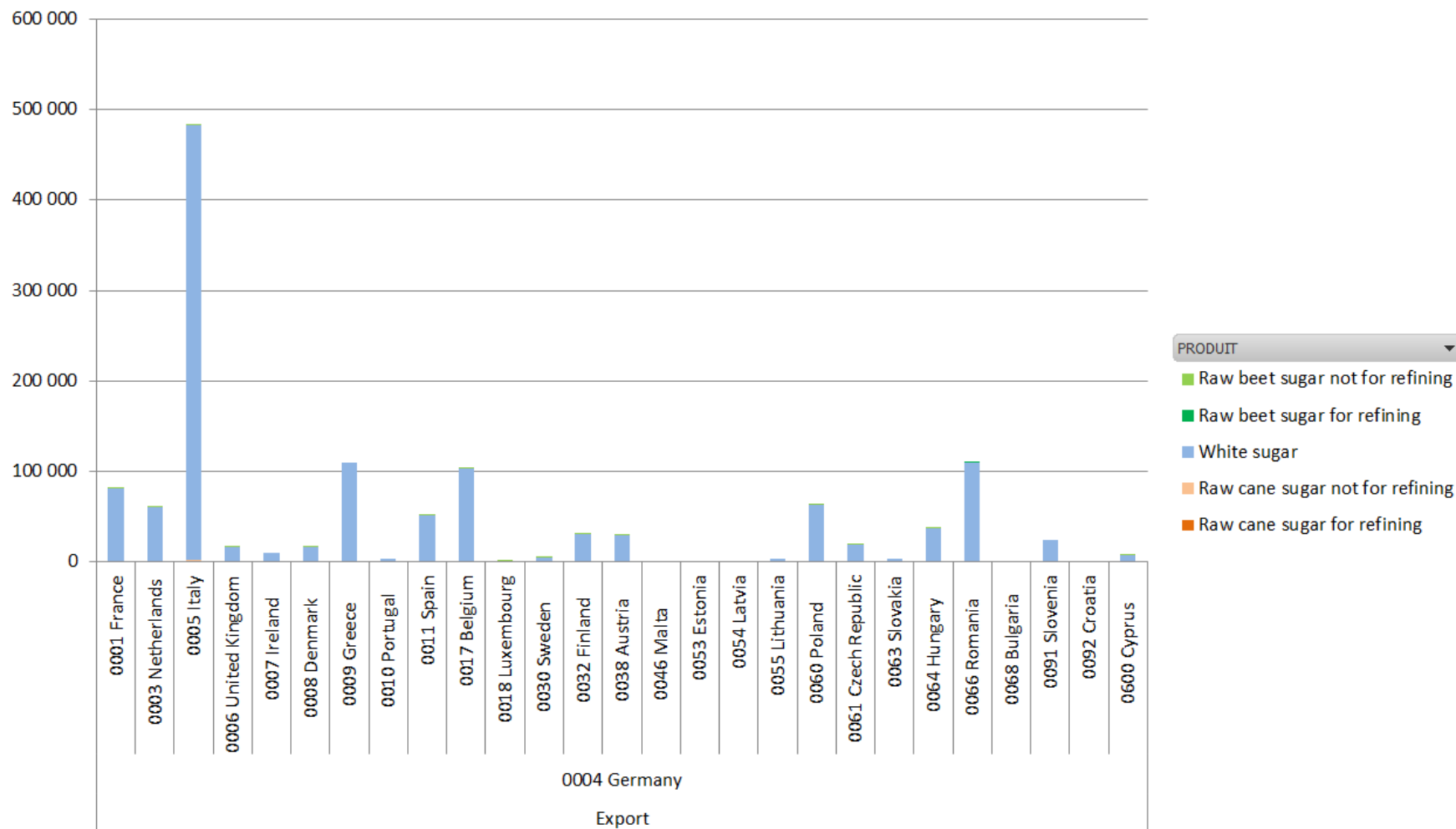
Intra-EU trade for Sugar (Exp 2018/19 – 5 m t)



Intra-EU trade for Sugar (FR Exp 2018/19 – 2.3 m t)



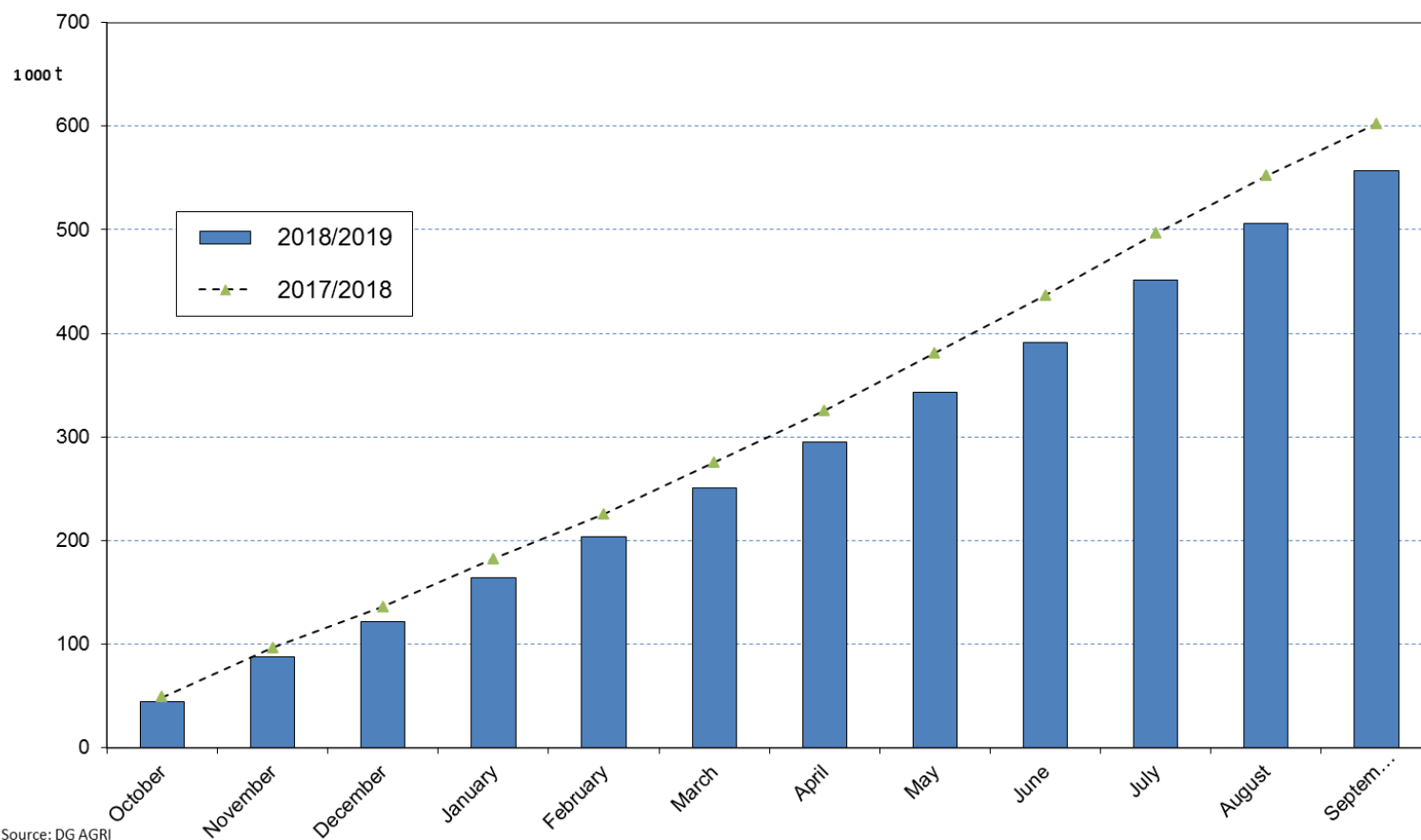
Intra-EU trade for Sugar (DE Exp 2018/19 – 1.3 m t)



EU Isoglucose

Isoglucose production in 2018/19

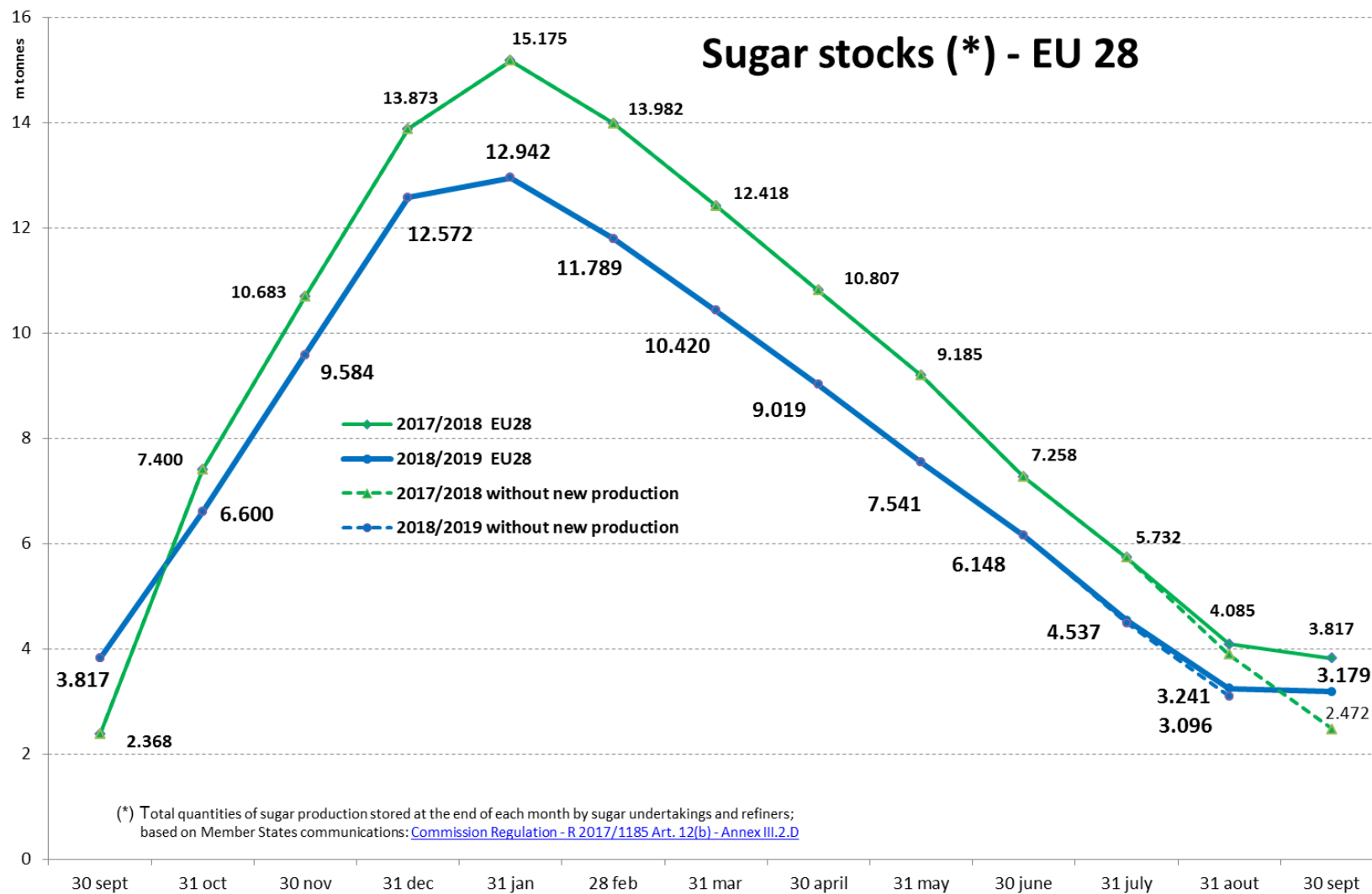
ISOGLUCOSE - EU monthly cumulated production for 2018/2019



Source: DG AGRI

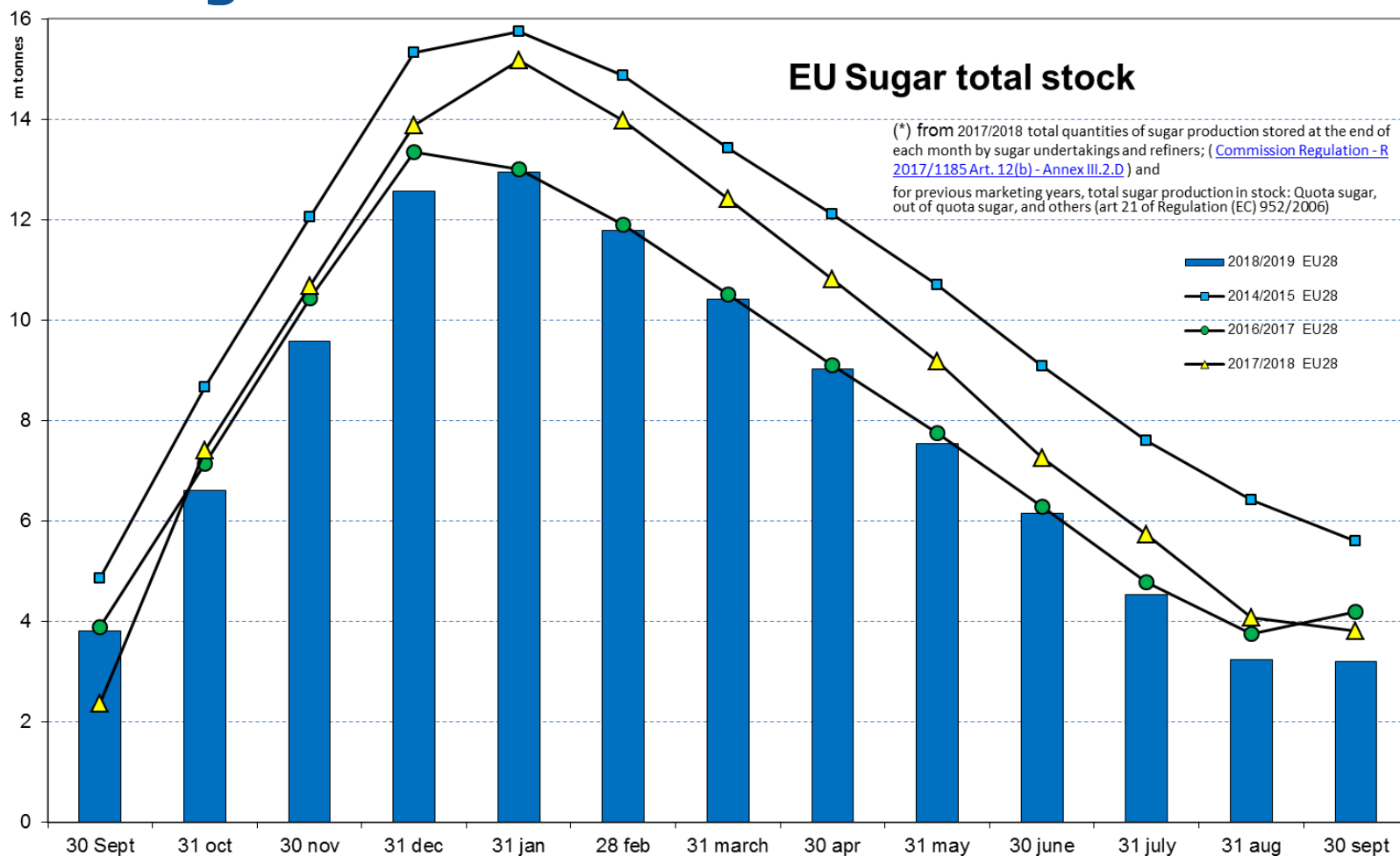
EU Sugar Stocks

Sugar stocks (*) - EU 28



(*) Total quantities of sugar production stored at the end of each month by sugar undertakings and refiners;
based on Member States communications: [Commission Regulation - R 2017/1185 Art. 12\(b\) - Annex III.2.D](#)

5. Sugar stocks



EU Sugar Balance

September 2019 update

AGRI G 4
Committee for the
Common Organisation of Agricultural Markets
26 September 2019

2018/2019 - Sugar Production

Provisional sugar production - July 2019

SUGAR Provisional production 2018/19					SUGAR Provisional production 2018/19				
<i>tonnes white sugar equivalent</i>	<i>areas '000 ha</i>	<i>yield t/ha</i>	<i>Production of the campaign</i>	<i>% increase compared to 2017/2018</i>	<i>tonnes white sugar equivalent</i>	<i>areas '000 ha</i>	<i>yield t/ha</i>	<i>Production of the campaign</i>	<i>% increase compared to 2017/2018</i>
(a)	(b) = (c) / (a)	(c)			(a)	(b) = (c) / (a)	(c)		
BE	63.7	13.0	830 316	-15%	HU	14.0	7.8	110 143	-22%
BG					NL	86.2	13.2	1 138 018	-14%
CZ	60.2	9.5	572 797	-13%	AT	31.1	10.5	324 845	-31%
DK	34.2	10.3	351 849		PL	238.9	9.2	2 191 294	-5%
DE	391.7	10.7	4 195 019	-19%	PT (Continent)			0	
EL (forecast)	1.3	6.7	8 424		PT (Açores)			0	
ES	27.6	14.1	390 685		RO	24.6	4.4	107 744	-51%
FR (Met.)	421.9	12.1	5 104 556	-18%	SK	21.9	7.6	166 228	-8%
FR (Dom.)			181 926		FI	10.3	5.2	53 228	
HR	16.6	7.2	119 487	-48%	SE	30.7	9.1	279 488	-9%
IT	34.4	6.3	216 244		UK	97.2	11.7	1 133 456	-17%
LT	16.2	9.1	147 085	5%	TOTAL	1 623	10.9	17 622 833	-17%

SUGAR BALANCE SHEET

2018/19 – September 2019

Provisional		
2018/19 (<i>oct-sept</i>) EU 28		x 1000 tonnes wse
Sugar	Isoglucose	
2 423	27	1 Beginning stocks
17 623	600	2 Production
2 433	10	3 Imports
1 850		3 1 - as such (*)
583		3 2 - in processed products
22 479	637	4 TOTAL AVAILABLE
		$4 = 1 + 2 + 3$

SUGAR BALANCE SHEET

2018/19 – September 2019

Provisional		
2018/19 (oct-sept) EU 28		x 1000 tonnes wse
Sugar	Isoglucose	
17 500	560	5 Consumption/disappearance
800		of which industrial use
1 000		of which bioethanol
15 700		other
3 250	50	6 Exports
1 600		6 1 - as such (**)
1 650		6 2 in processed products
1 729	27	7 Ending stocks
22 479	637	8 TOTAL OUTLETS
		$8 = 5 + 6 + 7 = 4$

2018/2019 2019/2020 Areas

September 2019

*Communication to the
Commission - 2019/2020*

Areas: 1533 Ha (provisional)

R 2017/1185 Art 12(b) - Annex III 2. A.

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Communication to the Commission

Areas - June 2019

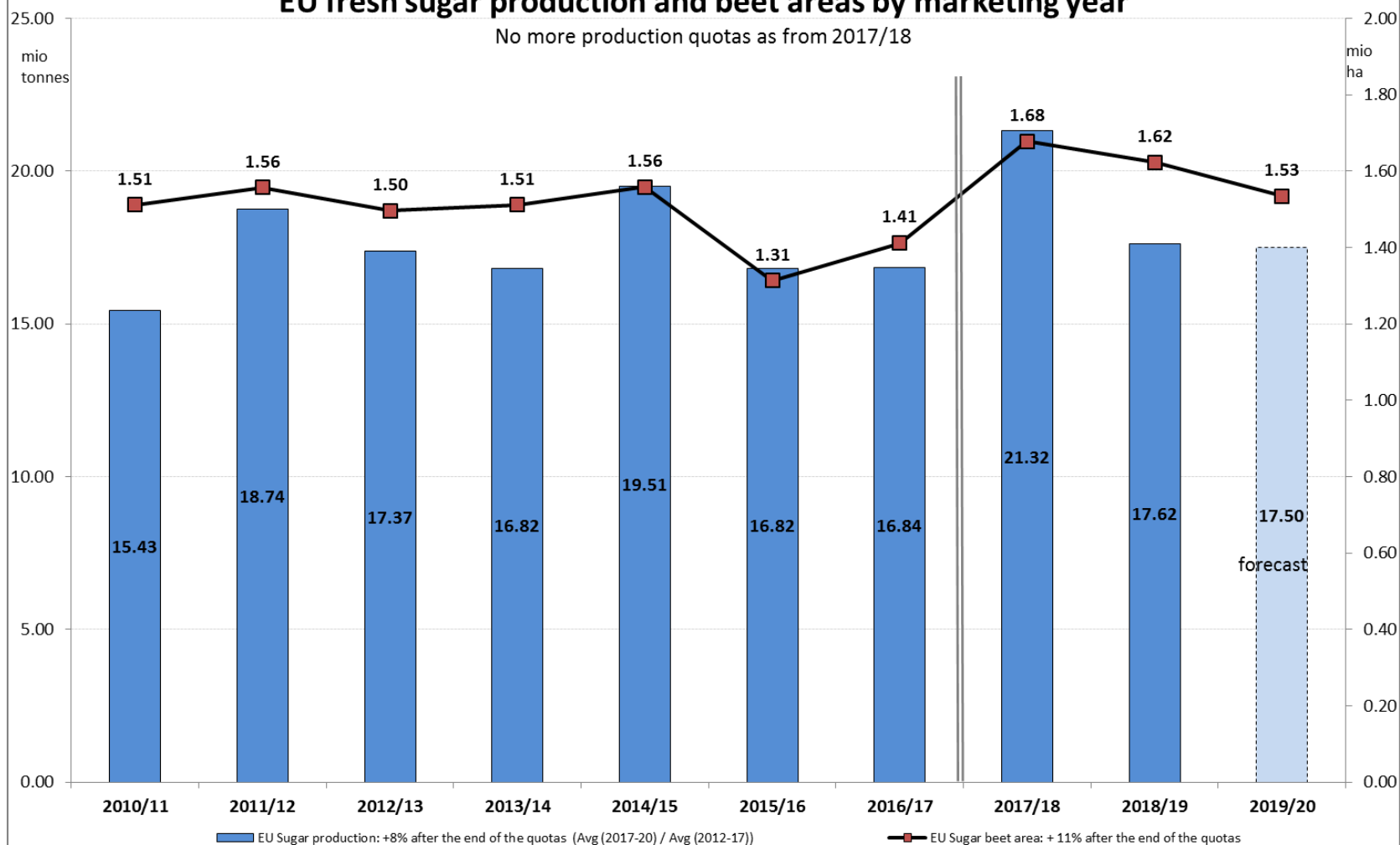
Commission Regulation - R 2017/1185 Art. 12(b) - Annex III.2.A

	areas (thousand ha) 2019/20	areas (thousand ha) 2018/19	Difference
BE	58.8	63.7	-7.6%
BG			
CZ	56.2	60.2	-6.6%
DK	29.3	34.2	
DE	375.4	391.7	-4.2%
EL	1.3	1.3	
ES	27.6	27.6	
FR (Met.)	388.4	421.9	-7.9%
FR (Dom.)			
HR	14.5	16.6	-12.6%
IT	30.2	34.4	-12.2%
LT	15.5	16.2	-4.5%
HU	13.5	14.0	-3.9%
NL	80.7	86.2	-6.4%
AT	28.0	31.1	-9.9%
PL	240.9	238.9	0.8%
PT (Continent)			
PT (Açores)			
RO	23.1	24.6	-6.3%
SK	22.7	21.9	3.2%
FI	10.7	10.3	4.4%
SE	26.6	30.7	-13.3%
UK	90.2	97.2	-7.2%
TOTAL	1 533	1 623	-5.5%

EL ES: Commission estimates

EU fresh sugar production and beet areas by marketing year

No more production quotas as from 2017/18



2019/2020 - Sugar Production

Sugar production forecast - 26 September 2019

SUGAR production forecast 2019/20					SUGAR production forecast 2019/20				
<i>tonnes white sugar equivalent</i>	<i>areas '000 ha</i>	<i>yield t/ha</i>	<i>Production of the campaign</i>	<i>% increase compared to 2018/2019</i>	<i>tonnes white sugar equivalent</i>	<i>areas '000 ha</i>	<i>yield t/ha</i>	<i>Production of the campaign</i>	<i>% increase compared to 2018/2019</i>
(a)	(b)	(c) = (a) * (b)			(a)	(b)	(c) = (a) * (b)		
BE	58.8	12.8	751 000	-10%	HU	13.5	7.8	105 000	-5%
BG					NL	80.7	14.0	1 129 800	-1%
CZ	56.2	10.3	576 569		AT	28.0	11.4	319 000	-2%
DK	29.3	12.0	351 516		PL	240.9	9.3	2 228 447	2%
DE	375.4	11.4	4 264 190	2%	PT (Continent)				
EL	1.3	6.2	7 737		PT (Açores)				
ES	27.6	14.8	408 280		RO	23.1	6.5	149 773	
FR (Met.)	388.4	12.4	4 820 447	-6%	SK	22.7	8.0	180 894	
FR (Dom.)			180 000		FI	10.7	7.0	75 000	
HR	14.5	9.0	130 000	9%	SE	26.6	11.2	297 920	7%
IT	30.2	7.7	231 358		UK	90.2	12.7	1 150 000	1%
LT	15.5	9.2	142 366		TOTAL	1 533	11.4	17 499 297	-1%

Production forecast based on areas and long term average yield per MS
for CZ, DK, EL, ES, IT, LT, RO, SK;
MS estimates for others

SUGAR BALANCE SHEET

2019/20 – September 2019

Forecast		
2019/20 (<i>oct-sept</i>) EU 28		x 1000 tonnes wse
Sugar	Isoglucose	
1 729	27	1 Beginning stocks
17 499	600	2 Production
2 583	10	3 Imports
2 000		3 1 - as such (*)
583		3 2 - in processed products
21 811	637	4 TOTAL AVAILABLE
		$4 = 1 + 2 + 3$

SUGAR BALANCE SHEET

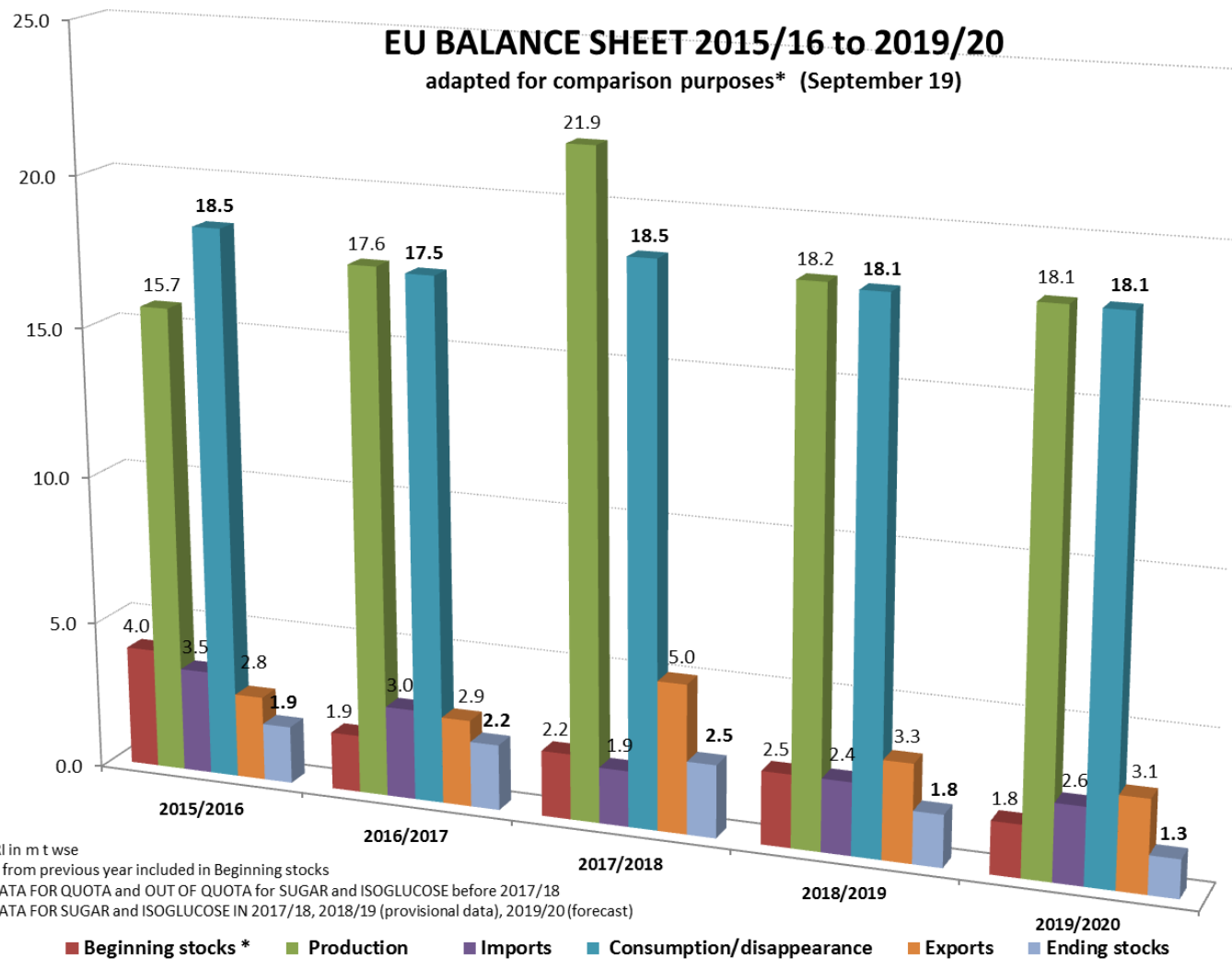
2019/20 – September 2019

Forecast		
2019/20 (oct-sept) EU 28		x 1000 tonnes wse
Sugar	Isoglucose	
17 500	560	5 Consumption/disappearance
800		of which industrial use
1 000		of which bioethanol
15 700		other
3 050	50	6 Exports
1 400		6 1 - as such (**)
1 650		6 2 in processed products
1 261	27	7 Ending stocks
21 811	637	8 TOTAL OUTLETS
		$8 = 5 + 6 + 7 = 4$

SUGAR AND ISOGLUCOSE BALANCE SHEET

2017/18 – 2019/20 September 2019

Final		Provisional		Forecast		
2017/18 (oct-sept)		2018/19 (oct-sept)		2019/20 (oct-sept)		x 1000 tonnes wse
EU 28		EU 28		EU 28		
Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	
2 174	29	2 423	27	1 729	27	1 Beginning stocks
21 317	602	17 623	600	17 499	600	2 Production
1 869	10	2 433	10	2 583	10	3 Imports
1 286		1 850		2 000		3 1 - as such (*)
583		583		583		3 2 - in processed products
25 360	641	22 479	637	21 811	637	4 TOTAL AVAILABLE
						$4 = 1 + 2 + 3$
17 978	569	17 500	560	17 500	560	5 Consumption/disappearance
850		800		800		of which industrial use
900		1 000		1 000		of which bioethanol
16 228		15 700		15 700		other
4 960	45	3 250	50	3 050	50	6 Exports
3 353		1 600		1 400		6 1 - as such (**)
1 607		1 650		1 650		6 2 in processed products
2 423	27	1 729	27	1 261	27	7 Ending stocks
25 360	641	22 479	637	21 811	637	8 TOTAL OUTLETS
						$8 = 5 + 6 + 7 = 4$





*Thank you
for your attention*