

EU Sugar Balance

September 2016 update

AGRI C 4
Civil Dialogue Group - Arable Crops
Sugar sector
14 December 2016

EU Sugar Balance

September 2016 update

2013/2014 *Final*

2014/2015 *Final*

2015/2016 *Provisional*

2016/2017 *Forecast*

2014/2015 2015/2016 Areas

December 2015 Update

*Communication to the
Commission - 2015/2016
Areas: 1 340 000 Ha (estimate)
R 952/2006 Art 22 para 3*

	areas '000 ha 2015/16	areas '000 ha 2014/15	Difference
BE	53.7	59.8	-10.1%
BG			
CZ	58.2	66.2	-12.0%
DK	24.0	35.6	-32.6%
DE	294.7	348.0	-15.3%
EL	4.7	7.4	-36.1%
ES	36.6	38.5	-
FR (Met.)	350.5	371.2	-5.6%
FR (Dom.)			
HR	16.8	37.4	
IT	38.3	52.0	-26.4%
LT	12.3	16.2	-24.1%
HU	14.7	10.9	35.4%
NL	60.5	75.6	-20.0%
AT	45.6	50.6	-9.9%
PL	171.6	197.6	-13.1%
PT (Continent)			
PT (Açores)	0.1	0.1	-
RO	23.9	29.2	-18.1%
SK	21.4	22.3	-4.0%
FI	12.0	13.7	-12.4%
SE	20.0	33.7	-40.7%
UK	77.8	103.0	-24.5%
TOTAL	1 337	1 569	-14.7%

2015/2016 - EU Sugar – Provisional Production (09/2016)

tonnes white sugar equivalent	QUOTA R 183/2009	SUCRE							ISOGLUCOSE	ISOGLUCOSE	SUCRE+ ISOGLUCOSE available QUOTA PRODUCTION
		areas	yield	Production	carry forward	carry forward	Total	PRODUCTION	OUT OF	OUT OF	
		'000 ha	t/ha	of the	from 13/14	from 14/15	Production	under Quota	QUOTA	QUOTA	
		(a)	(b)	(c)	to 14/15	to 15/16	(f) = (c) + (d) - (e)	(h)	(indust. + carry.f.)	(export / release	
					(d)	(e)			(g) = (f) - (h)	EU market)	
BE	676 235	53.7	13.6	749 538	87 605	34 750	802 393	676 235	126 158		790 815
BG					0	0	0	0			89 198
CZ	372 459	53.6	9.3	455 880	65 300	14 669	506 510	372 459	134 051		372 459
DK	372 383	24.8	12.5	310 458	65 000	3 135	372 323	372 323	0		372 323
DE	2 898 256	282.7	11.7	2 942 281	921 094	220 594	3 642 781	2 898 256	744 525	56 638	2 954 894
EL	158 702	4.9	5.1	150 719	6 180	0	156 899	156 899	0	0	156 899
ES	498 480	36.6	15.4	562 630	80 535	122 056	521 110	498 480	22 630	53 810	552 290
FR (Met.)	3 004 811	349.6	12.2	4 034 000	197 310	60 798	4 170 512	3 004 811	1 165 701		3 004 811
FR (Dom)1	432 220			562 959		0	562 959	432 220	130 739		432 220
HR	192 877	16.2	6.7	119 576	74 413	3 613	190 376	190 376	0		190 376
IT	508 379	38.1	7.3	480 399	194 118	166 137	508 380	508 379	1	32 493	540 872
LT	90 252	12.3	8.1	128 018	6 000	0	134 018	90 252	43 766		90 252
HU	105 420	15.0	7.5	128 834	0	4 584	124 250	105 420	18 830	250 266	355 686
NL	804 888	56.9	13.4	765 352	189 000	25 000	929 352	804 888	124 464	0	804 888
AT	351 027	45.4	9.4	411 185	91	80	411 195	351 027	60 167		351 027
PL	1 405 608	171.6	8.5	1 422 821	321 716	90 160	1 654 378	1 405 608	248 769	42 861	1 448 470
PT (Continental)	0			0		0	0	0		12 500	12 500
PT (Açores)	9 953	0.1		371		0	371	371	0		371
RO	104 689	23.6	5.4	119 139	34 593	13 612	140 120	104 689	35 431		104 689
SK	112 320	21.7	9.2	232 408	0	0	232 408	112 320	120 088	68 095	180 414
FI	80 999	12.5	4.8	120 208	11 229	0	131 437	80 999	50 438	0	80 999
SE	293 186	19.0	10.3	257 666	83 000	0	340 666	293 186	47 480		293 186
UK	1 056 474	74.2	13.2	977 882	325 423	168 949	1 134 356	1 056 474	77 882		1 056 474
TOTAL	13 529 618	1 313	10.9	14 932 324	2 662 608	928 139	16 666 793	13 515 672	3 151 121	720 441	14 236 112

(*) AT : including sugar from molasses

BE Travail à façon 17 300 tonnes

HR Travail à façon 11 000 t

FI Travail à façon 60 000 t quota disponible

1 FR (Dom) : included 63 000 t Antilles + 187 000 t

LT Travail à façon 27 500 tonnes

IT Travail à façon 203 000 t

SE Travail à façon 61 600 tonnes

Réunion + 312 959 TAF from FR (Met)

EL Travail à façon 126 000 tonnes

HU Travail à façon 17 000 t

SK Travail à façon 32 443 tonnes

2015/2016 EU Sugar Balance Quota – September 2016 update

EU sugar imports forecast: 3.37 mio t

Imports as such: 2.82 mio t of which

- **ACP/LDC forecast at 1.625 mio t (- 0.275 miot)**
- **CXL forecast at 0.650 mio t**
- **Balkan & Moldavia forecast at 0.230 mio t**
- **TRQ Cent. Am., Col., Peru forecast at 0.240 mio t**
- **Ukraine: 0.024 mio t**
- **Others: 0.050 mio t (non-preferential)**

Imports in processed products: 0.549 mio t (2014/15 level)

Carry forward 2015/2016 to 2016/2017

September 2016

*Communication to the
Commission - 2015/2016
R 967/2006 Art 17*

Sugar : 928 139 tonnes

Isoglucose: (15/11/2016)

Member State	SUGAR (tonnes)
Belgium	34 750
Bulgaria	0
Czech Republic	14 669
Denmark	3 135
Germany	220 594
Greece	0
Spain	122 056
France	60 798
Croatia	3 613
Italy	166 137
Lithuania	0
Hungary	4 584
Netherlands	25 000
Austria	80
Poland	90 160
Portugal	
Romania	13 612
Slovakia	
Finland	
Sweden	0
United Kingdom	168 949
TOTAL	928 139

EU Sugar Balance

September 2016 update

2013/2014	<i>Final</i>
2014/2015	<i>Final</i>
2015/2016	<i>Provisional</i>
2016/2017	<i>Forecast</i>

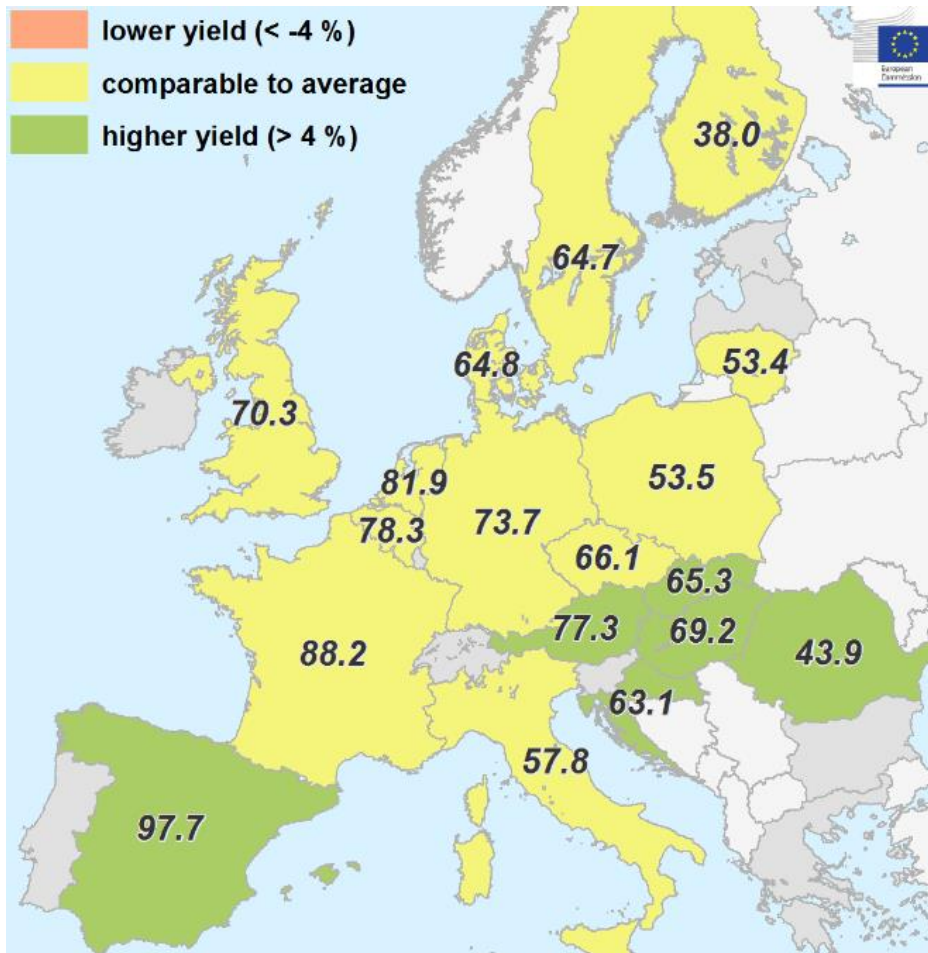
2015/2016 2016/2017 Areas

July 2016 Update

*Communication to the
Commission - 2016/2017
Areas: 1 413 000 Ha (estimate)
R 952/2006 Art 22 para 3*

	areas '000 ha 2016/17	areas '000 ha 2015/16	Difference
BE	56.3	53.7	4.8%
BG			
CZ	61.0	53.6	13.8%
DK	32.7	24.8	31.9%
DE	299.3	282.7	5.9%
EL	5.1	4.9	5.1%
ES	36.6	36.6	-
FR (Met.)	366.6	349.6	4.9%
FR (Dom.)			
HR	18.8	16.2	16.4%
IT	33.1	38.1	-13.3%
LT	14.7	12.3	19.2%
HU	13.7	15.0	-8.8%
NL	70.1	56.9	23.2%
AT	43.6	45.4	-4.0%
PL	203.0	171.6	18.3%
PT (Continent)			
PT (Açores)	0.1	0.1	-
RO	24.0	23.6	1.8%
SK	22.1	21.7	1.7%
FI	11.0	12.5	-12.0%
SE	30.0	19.0	57.9%
UK	70.8	74.2	-4.6%
TOTAL	1 413	1 313	7.6%

2016/17 Sugar beet yield forecast



*Actual yield versus
average yield 2011 –
2015*

*Avg 5yrs = 71.83 t/ha
MARS = 73.76 t/ha*

**MARS Bulletin vol 24 No 11 (2016)
November 2016**

2016/2017 - EU Sugar – Production forecast 09/2016

tonnes white sugar equivalent	QUOTA R 513/2010	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 15/16 to 16/17 (d)	Total Production (e) = (c) + (d)	PRODUCTION under Quota (f)	OUT OF QUOTA (indust., carry f.) (g) = (e) - (f)	QUOTA	
BE	676 235	56.3	12.1	682 572	34 750	717 322	676 235	41 087	114 580	790 815
BG							0		89 198	89 198
CZ	372 459	61.0	8.9	541 453	14 669	556 122	372 459	183 663		372 459
DK	372 383	32.7	12.7	414 978	3 135	418 114	372 383	45 731		372 383
DE	2 898 256	299.3	12.6	3 758 439	220 594	3 979 033	2 898 256	1 080 777	56 638	2 954 894
EL	158 702	5.1	7.3	37 336	0	37 336	37 336	0		37 336
ES	498 480	36.6	14.7	537 830	122 056	659 886	498 480	161 405	53 810	552 290
FR (Met.)	3 004 811	366.6	12.5	4 578 735	60 798	4 639 533	3 004 811	1 634 722		3 004 811
FR (Dom.)	432 220			280 000		280 000	280 000	0		280 000
HR	192 877	18.8	7.8	192 877	3 613	196 490	192 877	3 613		192 877
IT	508 379	33.1	9.2	303 431	166 137	469 568	469 568	0	32 493	502 061
LT	90 252	14.7	8.9	131 270	0	131 270	90 252	41 018		90 252
HU	105 420	13.7	8.9	122 327	4 584	126 911	105 420	21 491	250 266	355 686
NL	804 888	70.1	13.2	925 142	25 000	950 142	804 888	145 254		804 888
AT	351 027	43.6	9.4	408 953	80	409 033	351 027	58 006		351 027
PL	1 405 608	203.0	10.3	2 100 604	90 160	2 190 764	1 405 608	785 156	42 861	1 448 470
PT (Continental)	0			0	0	0	0	0	12 500	12 500
PT (Açores)	9 953	0.1		1 800		1 800	1 800	0		1 800
RO	104 689	24.0	4.9	118 310	13 612	131 922	104 689	27 234		104 689
SK	112 320	22.1	9.1	200 784	0	200 784	112 320	88 464	68 095	180 414
FI	80 999	11.0	6.0	65 659	0	65 659	65 659	0		65 659
SE	293 186	30.0	10.8	323 441	0	323 441	293 186	30 255		293 186
UK	1 056 474	70.8	13.2	937 137	168 949	1 106 086	1 056 474	49 612		1 056 474
TOTAL	13 529 618	1 413	11.8	16 663 076	928 139	17 591 215	13 193 728	4 397 488	720 441	13 914 169

quota disponible

2016/2017 EU Sugar Balance Quota – September 2016 update

EU sugar imports forecast: 3.49 mio t

Imports as such: 2.94 mio t of which

- **ACP/LDC forecast at 1.625 mio t**
- **CXL forecast at 0.650 mio t**
- **Balkan & Moldavia forecast at 0.225 mio t**
- **TRQ Cent. Am., Col., Peru forecast at 0.240 mio t**
- **Ukraine: 0.020 mio t, South Africa : 0.075 mio t**
- **Ecuador: 0.025 mio t, 'Croatia WTO': 0.029**
- **Others: 0.050 mio t (non-preferential)**

Imports in processed products: 0.549 mio t (2015/16 level)

SUGAR AND ISOGLUCOSE BALANCE SHEET

2016/17 – September 2016

SUGAR AND ISOGLUCOSE

	Forecast	
x 1000 tonnes	2016/17 (oct-sept)	
	EU 28	
	quota	out of quota
1 Beginning stocks	715	0
1 1 private	715	
1 2 intervention	0	
		Estimate 'Travail à façon'
2 Production	14 214	4 137
of which quota / out-of-quota	13 914	- 300
release out-of-quota	0	4 437
3 Imports	3 489	5
3 1 - as such (*)	2 940	
3 2 - in processed products	549	
4 TOTAL AVAILABLE	18 418	4 142
$4 = 1 + 2 + 3$		

SUGAR AND ISOGLUCOSE BALANCE SHEET

2016/17 – September 2016

SUGAR AND ISOGLUCOSE

	Forecast	
x 1000 tonnes	2016/17 (oct-sept)	
	EU 28	
	quota	out of quota
5 Consumption/disappearance	16 730	2 150
		800 indust.
		1 350 bioeth.
6 Exports	1 480	690
6 1 - as such (**)	75	
6 2 in processed products	1 405	
7 Ending stocks	207	1 302
7 1- private	207	
(of which stock declared by manufacturers and refiners)		
7 2 - intervention	0	
8 TOTAL OUTLETS	18 418	4 142
$8 = 5 + 6 + 7 = 4$		

SUGAR AND ISOGLUCOSE BALANCE SHEET

2013/14 – 2016/17 September 2016

SUGAR AND ISOGLUCOSE

	Final		Final		Provisional		Forecast	
x 1000 tonnes	2013/14 (oct-sept) EU 28		2014/15 (oct-sept) EU 28		2015/16 (oct-sept) EU 28		2016/17 (oct-sept) EU 28	
	quota	out of quota	quota	out of quota	quota	out of quota	quota	out of quota
1 Beginning stocks	2 557	0	2 013	0	1 331	0	715	0
1 1 private	2 494		2 013		1 331		715	
1 2 intervention	0		0		0		0	
2 Production	14 220	4 013	14 234	6 603	14 236	4 129	14 214	300
of which quota / out-of-quota	14 220	4 013	14 234	6 603	14 236	4 129	13 914	Estimate 'Travail à façon'
release out-of-quota	0	0	0	0	0	0	0	- 300
3 Imports	3 778	4	3 370	4	3 369	34	3 489	4 137
3 1 - as such (*)	3 194		2 821		2 820		2 940	
3 2 - in processed products	584		549		549		549	
4 TOTAL AVAILABLE	20 556	4 017	19 617	6 607	18 936	4 163	18 418	4 142
<i>4 = 1 + 2 + 3</i>								
5 Consumption/disappearance	17 199	2 092	16 752	2 604	16 736	1 835	16 730	2 150
		814 indust. 1 278 bioeth.		870 indust. 1 734 bioeth.		800 indust. 1 035 bioeth.		800 indust. 1 350 bioeth.
6 Exports	1 344	1 365	1 535	1 341	1 485	1 400	1 480	690
6 1 - as such (**)	75		129		80		75	
6 2 in processed products	1 269		1 405		1 405		1 405	
7 Ending stocks	2 013	560 carry forward	1 331	2 663 carry forward	715	928 carry forward	207	1 302
7 1- private	2 013		1 331		715		207	
(of which stock declared by manufacturers and refiners)								
7 2- intervention	0		0		0		0	
8 TOTAL OUTLETS	20 556	4 017	19 617	6 607	18 936	4 163	18 418	4 142
<i>8 = 5 + 6 + 7 = 4</i>								



*Thank you
for your attention*