

EU Sugar Balance

October 2015 update

AGRI C 4
Expert group
on the future of the sugar market
29 October 2015

EU Sugar Balance October 2015 update

2012/2013 Final

2013/2014 Final

2014/2015 Provisional

2015/2016 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
		Area '000 ha	yield t/ha	"Fresh" Production	carry over from 11/12 to 12/13	carry forward from 12/13 to 13/14	Total production	PRODUCTION Quota	OUT OF QUOTA (indust. + export)	QUOTA Production	OUT OF QUOTA export	(k) = (g) + (i)
		(a)	(b)	(c)	(d)	(e)	(f) = (c) + (d) - (e)	(g)	(h) = (f) - (g)	(i)	(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 (continent)	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 October 2015 update

2012/2013 Final

2013/2014 Final

2014/2015 Provisional

2015/2016 Forecast

2013/2014 - EU Sugar – Final Production

tons white sugar	QUOTA R 183/2009	SUCRE								ISOGLUCOSE	ISOGLUCOSE	SUCRE + ISOGLUCOSE
		Superficie		Production of the campaign (c)	carry forward from 12/13 to 13/14 (d)	carry forward from 13/14 to 14/15 (e)	Total Production (f) = (c) + (d) - (e)	PRODUCTION under Quota (h)	OUT OF QUOTA (indust. + carryf.) (g)= (f) -(h)	QUOTA	OUT OF QUOTA (export)	available QUOTA PRODUCTION
		'000 ha (a)	t/ha (b)									
BE	676 235	61.8	12.7	783 168	35 648	36 289	782 527	676 235	106 292	114 580	0	790 815
BG						0	0	0		89 198	14 386	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	31 000	439 997	372 383	67 614			372 383
DE	2 898 256	334.6	11.1	3 421 767	401 973	188 027	3 635 713	2 898 256	737 458	56 638	0	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	12.8	448 856	34 530	1 381	482 005	482 005	0	53 810	0	535 815
FR (met.)	3 004 811	360.7	11.5	4 140 865	18 895	5 712	4 154 048	3 004 811	1 149 236			3 004 811
FR (Dom)	432 220			432 831		0	432 831	431 134	1 697			431 134
HR	192 877	25.8	6.8	192 880		3	192 877	192 877	0			192 877
IT	508 379	40.7	7.0	507 841	64 782	64 244	508 379	508 379	0	32 493	0	540 872
LT	90 252	17.8	8.6	172 153	10	1 050	171 113	90 252	80 861			90 252
HU	105 420	15.6	7.4	115 649	0	10 229	105 420	105 420	0	250 266	5 395	355 686
NL	804 888	73.3	12.9	947 865	0	20 000	927 865	804 888	122 977	0		804 888
AT (*)	351 027	51.0	10.2	484 279	0	277	484 002	351 027	132 974			351 027
PL	1 405 608	184.9	9.6	1 712 914	48 051	47 729	1 713 236	1 405 608	307 628	42 861	0	1 448 470
PT (contine	0			0		0	0	0		10 562	0	10 562
PT (Açores	9 953	0.4		845		0	845	845	0			845
RO	104 689	28.6	5.8	261 658	1 459	16 381	246 736	104 689	142 047			104 689
SK	112 320	20.1	8.6	219 042	0	0	219 042	112 320	106 722	67 336	0	179 656
FI	80 999	12.0	6.1	116 647	0	0	116 647	80 999	35 648	0		80 999
SE	293 186	35.4	10.7	377 655	14 000	26 000	365 655	293 186	72 469			293 186
UK	1 056 474	106.0	11.6	1 233 598	43 097	89 921	1 186 775	1 056 474	130 301			1 056 474
TOTAL	13 529 618	1 512	11.1	16 731 875	674 093	559 947	16 846 021	13 502 948	3 343 074	717 745	19 782	14 220 692

2013/2014 EU Sugar Balance Quota – January 2015 update

*EU sugar imports : 3.750 mio t wse
based on EUROSTAT Comext data*

*Imports as such: 3.170 mio t wse of which main origins
(quantities rounded in 'tel quel')*

- **ACP/LDC 2.220 mio t tel quel**
- **Brazil 0.215 mio t Cuba 0.220 mio t**
- **Balkan & Moldavia 0.185 mio t**
- **TRQ Cent. Am., Col., Peru 0.270 mio t**
- **Others origins: 0.100 mio t**

Imports in processed products: 0.580 mio t

EU Sugar Balance

October 2015 update

<i>2012/2013</i>	<i>Final</i>
<i>2013/2014</i>	<i>Final</i>
<i>2014/2015</i>	<i>Provisional</i>
<i>2015/2016</i>	<i>Forecast</i>

2014/2015 - EU Sugar – Provisional Production

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.) (g) = (f) - (h)	(export / release EU market)	
BE	676 235	60	13.6	845 729	36 289	88 685	793 332	676 235	117 097	114 580	790 815
BG					0	0	0	0		89 198	89 198
CZ	372 459	66	8.9	586 185	20 207	65 300	541 091	372 459	168 632		372 459
DK	372 383	36	13.4	476 517	31 000	65 000	442 517	372 383	70 134		372 383
DE	2 898 256	348	13.4	4 491 076	188 027	921 094	3 758 009	2 898 256	859 753	56 638	2 954 894
EL	158 702	7	7.2	193 535	1 497	6 180	188 852	158 702	30 150	0	158 702
ES	498 480	39	15.1	610 544	1 381	81 173	530 753	498 480	32 272	53 810	552 290
FR (Met.)	3 004 811	371	13.7	4 695 153	5 712	197 310	4 503 555	3 004 811	1 498 743		3 004 811
FR (Dom.)	432 220			491 823		0	491 823	429 223	62 600		429 223
HR	192 877	27	8.6	319 891	3	74 413	245 481	192 877	52 604		192 877
IT	508 379	52	8.9	586 128	64 244	194 118	456 254	456 254	0	32 493	488 747
LT	90 252	16	6.8	130 463	1 050	6 000	125 513	90 252	35 261		90 252
HU	105 420	11	9.8	105 889	10 229	0	116 118	105 420	10 698	250 266	355 686
NL	804 888	76	14.5	1 093 909	20 000	189 000	924 909	804 888	120 021	0	804 888
AT	351 027	51	10.2	398 971	277	91	399 158	351 027	48 130		351 027
PL	1 405 608	198	10.3	1 985 024	47 729	321 716	1 711 037	1 405 608	305 429	42 861	1 448 470
PT (Continental)	0			0		0	0	0		12 500	12 500
PT (Açores)	9 953	0		800		0	800	800	0		800
RO	104 689	29	7.1	223 987	16 381	34 593	205 776	104 689	101 087		104 689
SK	112 320	22	9.3	206 983	0	0	206 983	112 320	94 663	68 095	180 414
FI	80 999	14	6.7	138 228	0	11 229	126 999	80 999	46 000	0	80 999
SE	293 186	34	11.2	382 000	26 000	83 000	325 000	293 186	31 814		293 186
UK	1 056 474	103	14.0	1 446 549	89 921	325 423	1 211 047	1 056 474	154 573		1 056 474
TOTAL	13 529 618	1 558	12.1	19 409 384	559 947	2 664 325	17 305 005	13 465 343	3 839 662	720 441	14 185 784

2014/2015 EU Sugar Balance Quota – October 2015 update

EU sugar imports forecast: 3.35 mio t

Imports as such: 2.80 mio t of which

- **ACP/LDC forecast at 2.126 mio t**
- **CXL forecast at 0.147 mio t** (before 0.50 mio t)
- **Balkan & Moldavia forecast at 0.200 mio t**
- **TRQ Cent. Am., Col., Peru forecast at 0.240 mio t**
- **Transitional measures (Croatia): 0.040 mio t**
- **Others: 0.050 mio t (non-preferential)**

Imports in processed products: 0.55 mio t (11 m 14/15)

EU Sugar Balance October 2015 update

<i>2012/2013</i>	<i>Final</i>
<i>2013/2014</i>	<i>Final</i>
<i>2014/2015</i>	<i>Provisional</i>
<i>2015/2016</i>	<i>Forecast</i>

Carry forward 2014/2015 to 2015/2016 October 2015

*Communication to the
Commission - 2013/2014
R 967/2006 Art 17*

Total : 2 664 325 tonnes

Member State	SUGAR (tonnes)
Belgium	88 685.3
Bulgaria	0.0
Czech Republic	65 300.2
Denmark	65 000.0
Germany	921 094.1
Greece	6 179.9
Spain	81 172.9
France	197 310.0
Croatia	74 413.1
Italy	194 117.7
Lithuania	6 000.0
Hungary	0.0
Netherlands	189 000.0
Austria	90.5
Poland	321 716.5
Portugal	
Romania	34 592.7
Slovakia	0.0
Finland	11 229.0
Sweden	83 000.0
United Kingdom	325 423.1
TOTAL	2 664 325.2

2014/2015 2015/2016 Areas

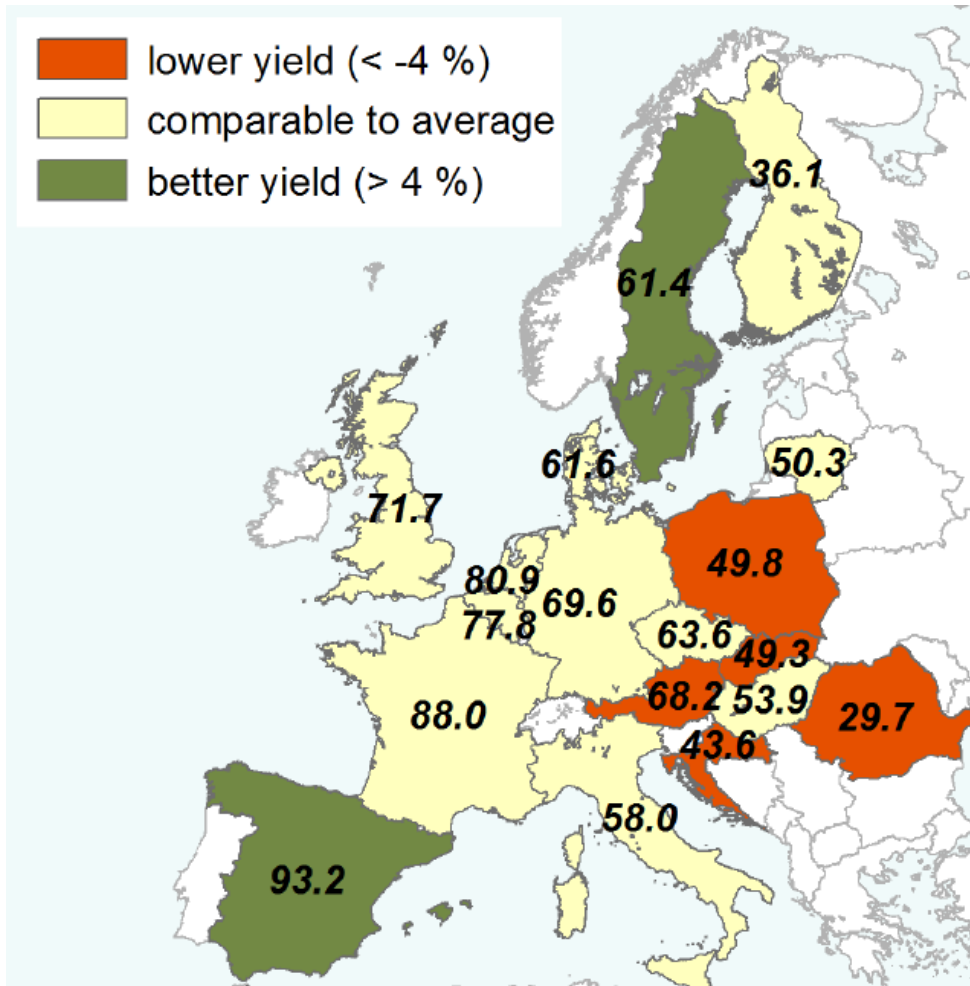
May 2015 Update

*Communication to the
Commission - 2015/2016
Areas: 1 338 000 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	NA	38.5	
FR (Met.)	350.5	371.2	-5.6%
FR (Dom.)			
HR	16.8	26.5	-36.7%
IT	38.3	52.0	-26.4%
LT	NA	16.2	
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	0.2%
RO	23.9	29.2	-18.1%
SK	21.4	22.3	-4.0%
FI	12.0	13.7	-12.4%
SE	19.3	33.7	-42.8%
UK	77.8	103.0	-24.5%
TOTAL	(1 338 *)	1 558	-14.1%

* estimate

2015/16 Sugar beet yield forecast



*Actual yield versus
average yield 2010 –
2014*

*Avg 5yrs = 70.44 t/ha
MARS = 70.48 t/ha*

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tonnes white sugar equivalent	QUOTA R 513/2010	SUGAR							ISOGLUCOSE QUOTA	SUGAR + ISOGLUCOSE available QUOTA PRODUCTION
		areas	yield	Production of the	carry forward	Total	PRODUCTION	OUT OF		
		'000 ha (a)	t/ha (b)	campaign (c) = (a) * (b)	from 14/15 to 15/16 (d)	Production (e) = (c) + (d)	under Quota (f)	QUOTA (indust. , carry f.) (g) = (e) -(f)		
BE	676 235	53.7	13.0	700 144	88 685	788 830	676 235	112 595	114 580	790 815
BG					0		0		89 198	89 198
CZ	372 459	58.2	9.5	555 513	65 300	620 813	372 459	248 354		372 459
DK	372 383	24.0	12.5	298 906	65 000	363 906	363 906	0		363 906
DE	2 898 256	294.7	11.0	3 234 268	921 094	4 155 362	2 898 256	1 257 106	56 638	2 954 894
EL	158 702	4.7	6.7	31 567	6 180	37 747	37 747	0		37 747
ES	498 480	35.0	13.5	473 817	81 173	554 990	498 480	56 509	53 810	552 290
FR (Met.)	3 004 811	350.5	13.2	4 607 690	197 310	4 805 000	3 004 811	1 800 189		3 004 811
FR (Dom.)	432 220		0.0	280 000		280 000	280 000	0		280 000
HR	192 877	16.8	7.9	131 905	74 413	206 319	192 877	13 442		192 877
IT	508 379	38.3	9.0	343 292	194 118	537 410	508 379	29 031	32 493	540 872
LT	90 252	15.0	7.7	116 240	6 000	122 240	90 252	31 988		90 252
HU	105 420	14.7	7.8	115 206	0	115 206	105 420	9 786	250 266	355 686
NL	804 888	60.5	13.5	815 026	189 000	1 004 026	804 888	199 138		804 888
AT	351 027	45.6	9.8	445 991	91	446 082	351 027	95 054		351 027
PL	1 405 608	171.6	7.8	1 339 997	321 716	1 661 714	1 405 608	256 106	42 861	1 448 470
PT (Continental)	0		0.0	0			0	0	12 500	12 500
PT (Açores)	9 953	0.1	0.0	800		800	800	0		800
RO	104 689	23.9	7.0	167 629	34 593	202 221	104 689	97 532		104 689
SK	112 320	21.4	8.7	187 091	0	187 091	112 320	74 772	68 095	180 414
FI	80 999	12.0	6.0	71 791	11 229	83 020	80 999	2 021		80 999
SE	293 186	19.3	9.6	185 000	83 000	268 000	268 000	0		268 000
UK	1 056 474	74.2	12.8	949 760	325 423	1 275 183	1 056 474	218 709		1 056 474
TOTAL	13 529 618	1 334	11.3	15 051 633	2 664 325	17 715 959	13 213 627	4 502 331	720 441	13 934 068

2015/2016 EU Sugar Balance Quota – October 2015 update

EU sugar imports forecast: 3.73 mio t

Imports as such: 3.18 mio t of which

- **ACP/LDC forecast at 2.000 mio t**
- **CXL forecast at 0.650 mio t**
- **Balkan & Moldavia forecast at 0.220 mio t**
- **TRQ Cent. Am., Col., Peru forecast at 0.240 mio t**
- **Ukraine: 0.020 mio t**
- **Others: 0.05 mio t (non-preferential)**

Imports in processed products: 0.551 mio t (2013/14 level)

SUGAR AND ISOGLUCOSE BALANCE SHEET

2012/13 – 2015/16 October 2015

SUGAR AND ISOGLUCOSE

	Final		Final		Provisional		Forecast	
x 1000 tonnes	2012/13 (oct-sept) EU 27		2013/14 (oct-sept) EU 28		2014/15 (oct-sept) EU 28		2015/16 (oct-sept) EU 28	
	quota	out of quota	quota	out of quota	quota	out of quota	quota	out of quota
1 Beginning stocks	1 595	0	2 557	0	2 013	0	1 045	0
1 1 private	1 595		2 494		2 013		1 045	
1 2 intervention	0		0		0		0	
2 Production	14 597	4 306	14 221	3 923	14 186	6 544	14 224	4 252
of which quota / out-of-quota	13 995	4 908	14 221	3 923	14 186	6 544	13 934	4 542
release out-of-quota	602	- 602	0	0	0	0	0	0
3 Imports	4 180	5	3 753	4	3 353	4	3 731	4
3 1 - as such (*)	3 656		3 170		2 802		3 180	
3 2 - in processed products	523		583		551		551	
4 TOTAL AVAILABLE	20 371	4 312	20 531	3 927	19 552	6 548	19 000	4 256
<i>4 = 1 + 2 + 3</i>								
5 Consumption/disappearance	16 596	2 302	17 203	2 011	16 997	2 493	17 000	2 150
		801 indust. 1 501 bioeth.		810 indust. 1 201 bioeth.		800 indust. 1 693 bioeth.		800 indust. 1 350 bioeth.
6 Exports	1 281	1 335	1 316	1 356	1 509	1 390	1 455	690
6 1 - as such (**)	63		75		129		75	
6 2 in processed products	1 218		1 241		1 380		1 380	
7 Ending stocks	2 494	674 carry forward	2 013	560 carry forward	1 045	2 664	545	1 416
7 1- private	2 494		2 013		1 045		545	
(of which stock declared by manufacturers and refiners)								
7 2 - intervention	0		0		0		0	
8 TOTAL OUTLETS	20 371	4 312	20 531	3 927	19 552	6 548	19 000	4 256
<i>8 = 5 + 6 + 7 = 4</i>								

(*) 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*