



Sugar Market situation

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

06 December 2024

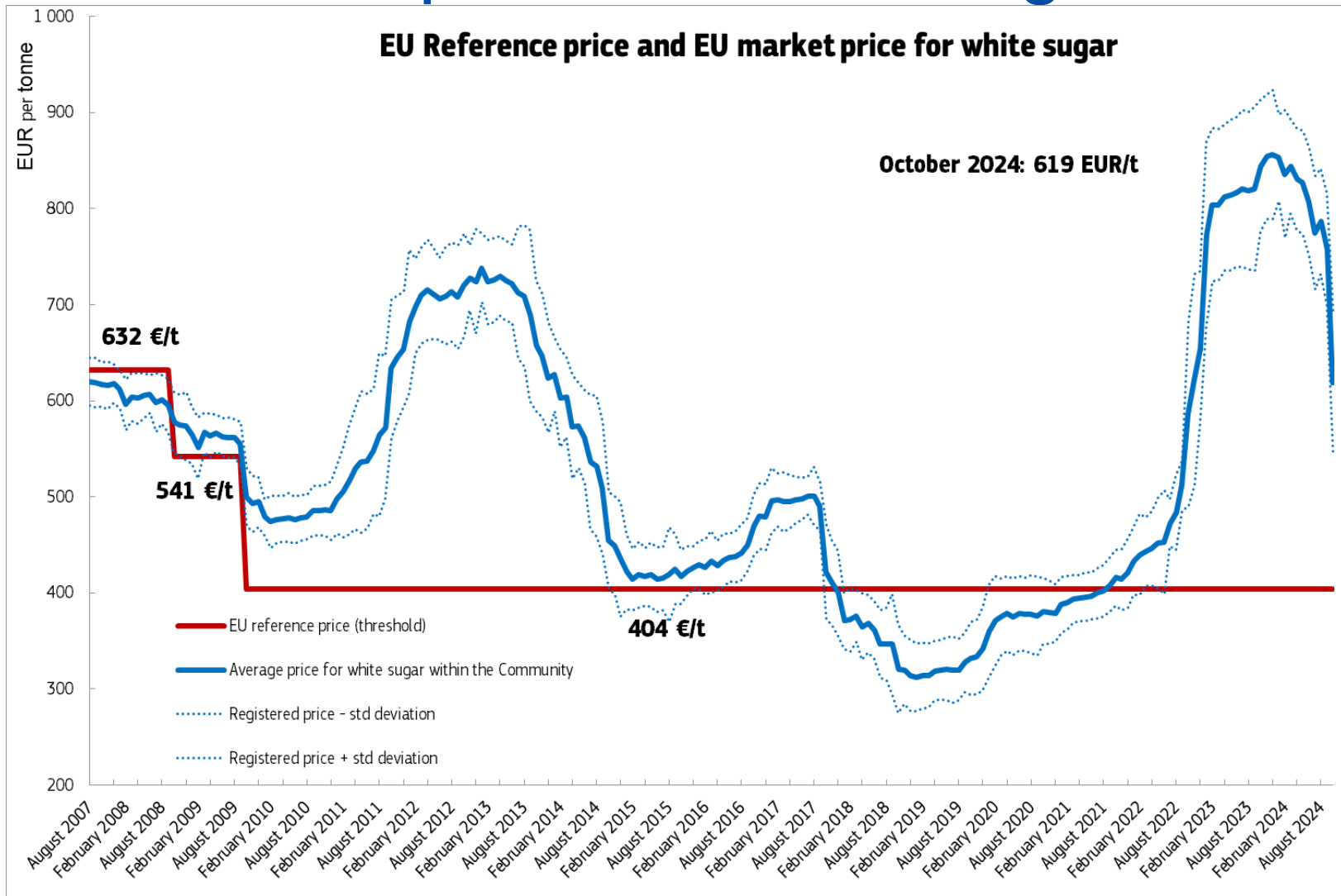


Sugar Price reporting

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

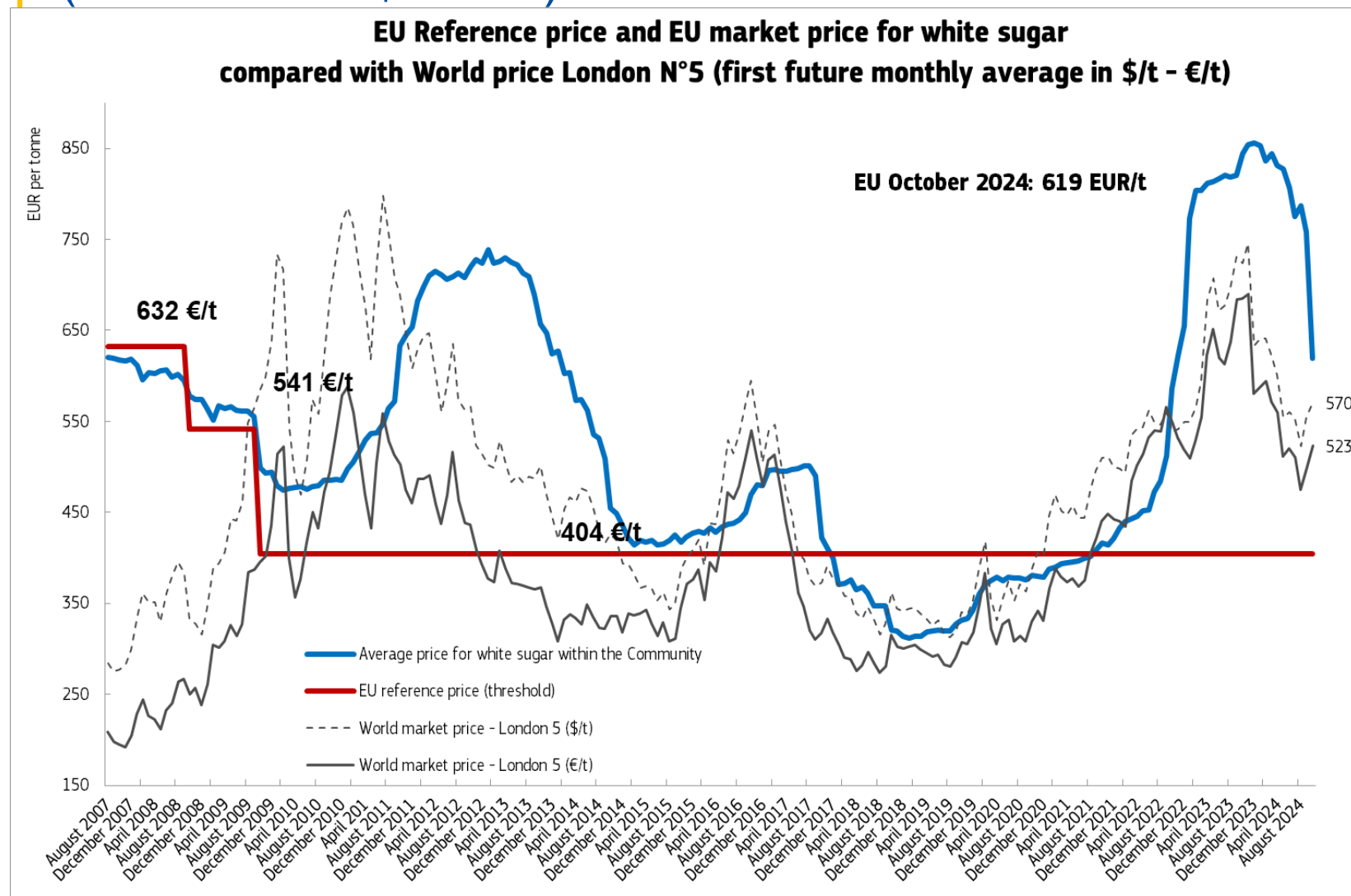
06 December 2024

EU market price for white sugar



- Decreased by EUR 139 per tonne compared to September 2024.

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



London N°5 (Oct.2024):

- + EUR 24 per tonne compared to previous month (+4.8%).
- - EUR 162 per tonne compared to Oct. 2023(-24%)

EU and Regional market prices for white sugar

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

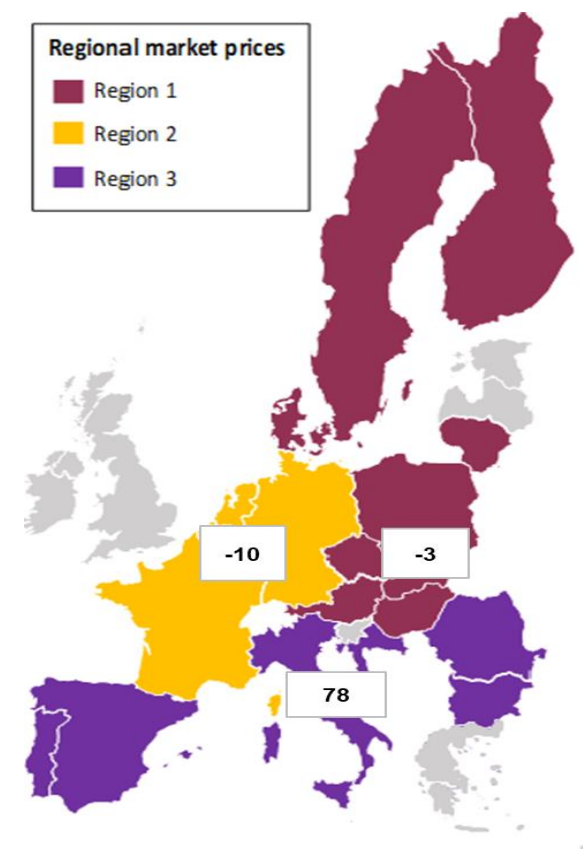
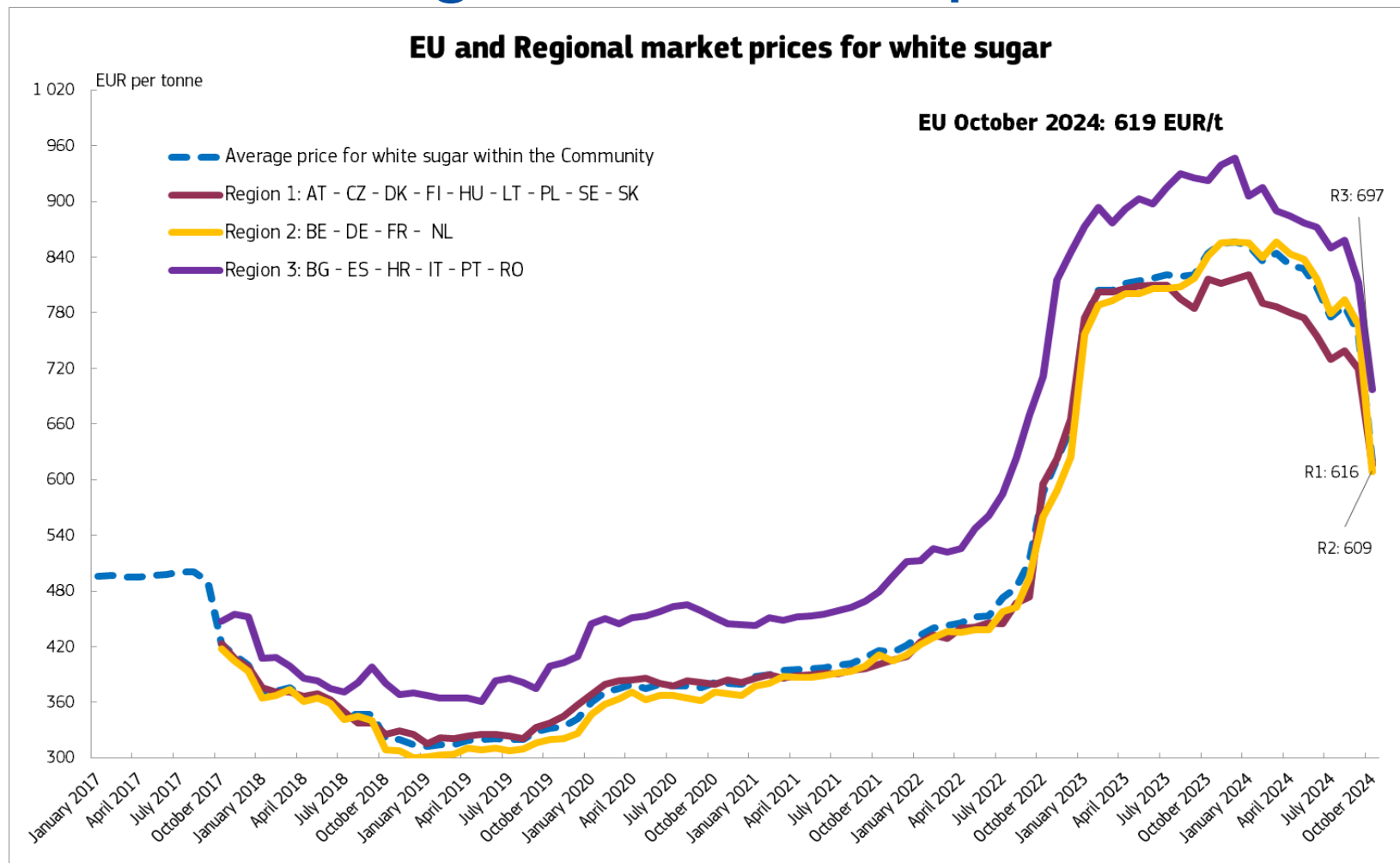
Region 2: BE - DE - FR - NL

Region 3: BG - ES - HR - IT - PT - RO

in €/t	EU		Region 1	Region 2	Region 3
	average (1)	std dev (2)	average (1)	average (1)	average (1)
October 2023	844	69	816	841	922
November 2023	854	65	812	855	939
December 2023	856	67	816	856	947
January 2024	853	45	821	855	906
February 2024	836	67	790	840	915
March 2024	844	49	786	856	890
April 2024	831	53	780	843	884
May 2024	827	54	774	838	877
June 2024	807	56	755	816	872
July 2024	775	59	730	779	850
August 2024	787	55	739	794	858
September 2024	758	58	719	767	813
October 2024	619	74	616	609	697

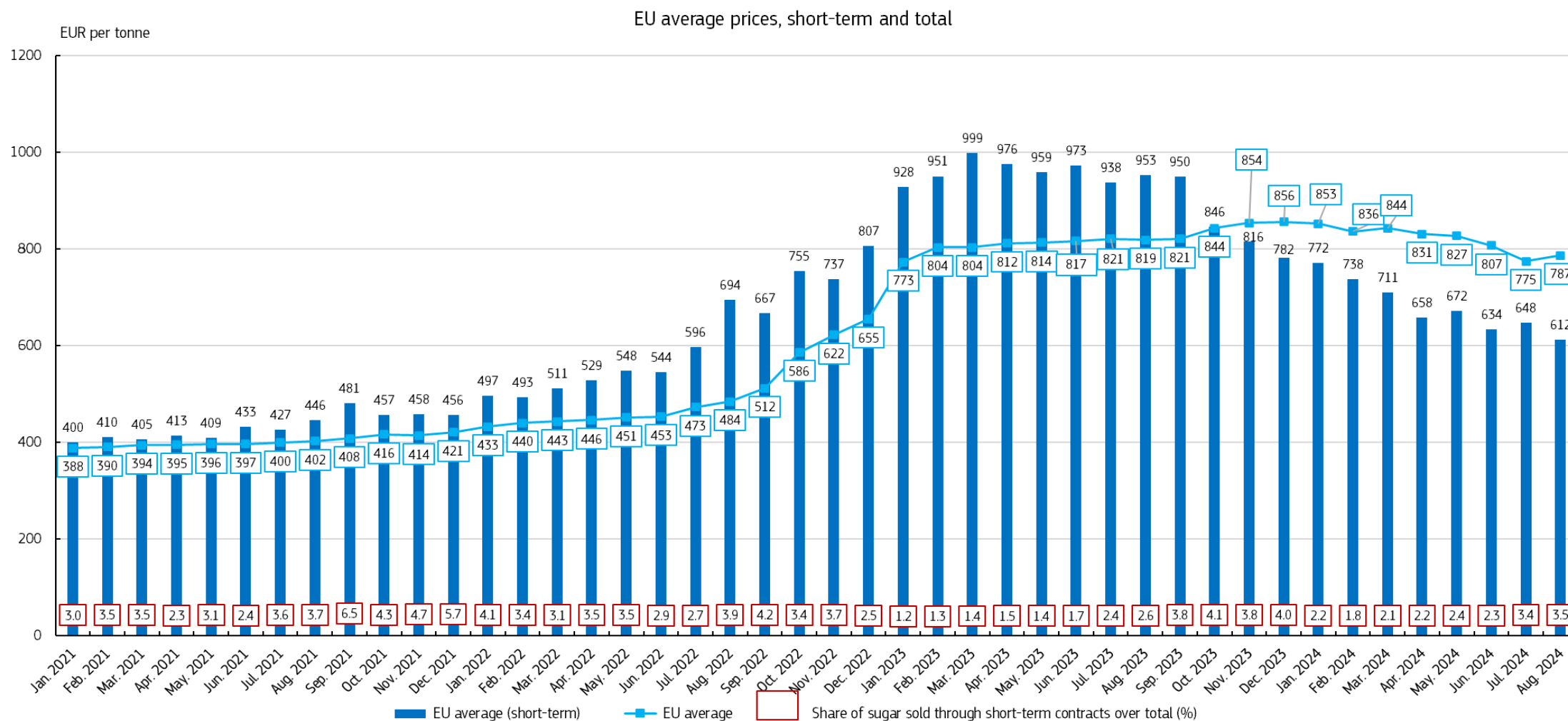
- -225 EUR/tonne compared to previous year

EU and Regional market prices for white sugar



Differences between EU average price and regional average prices

EU short-term prices



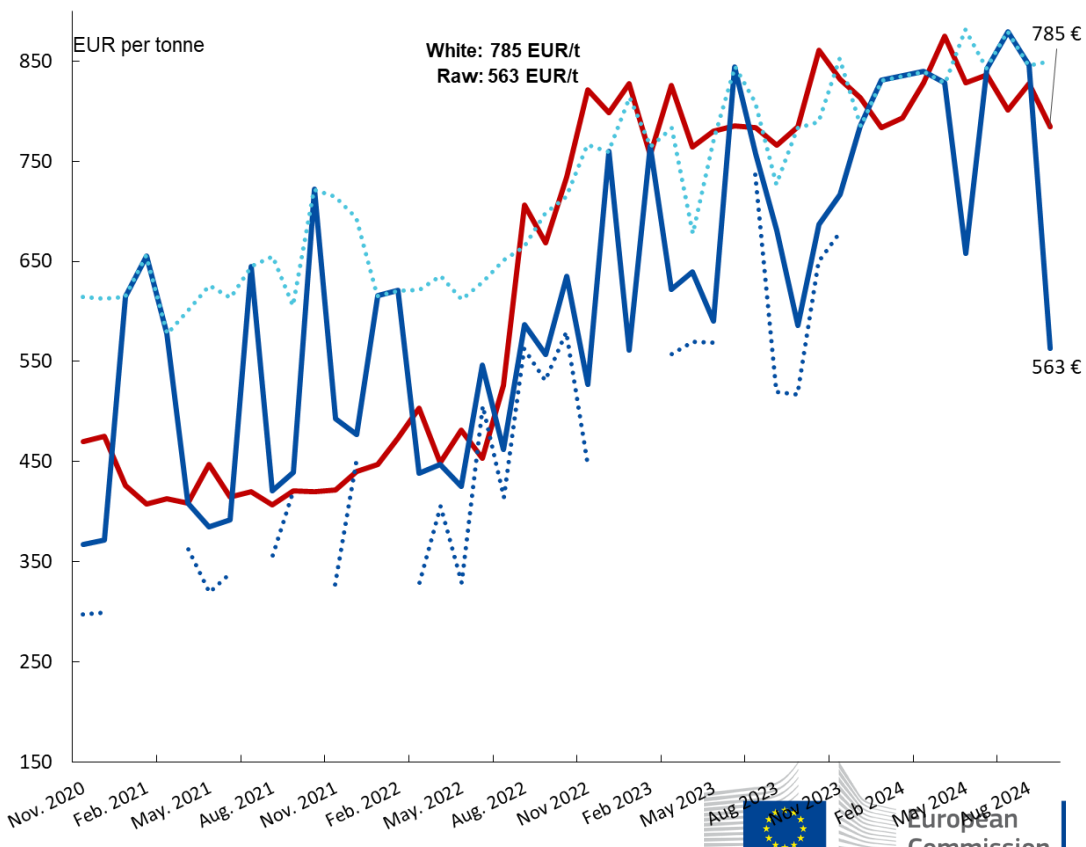
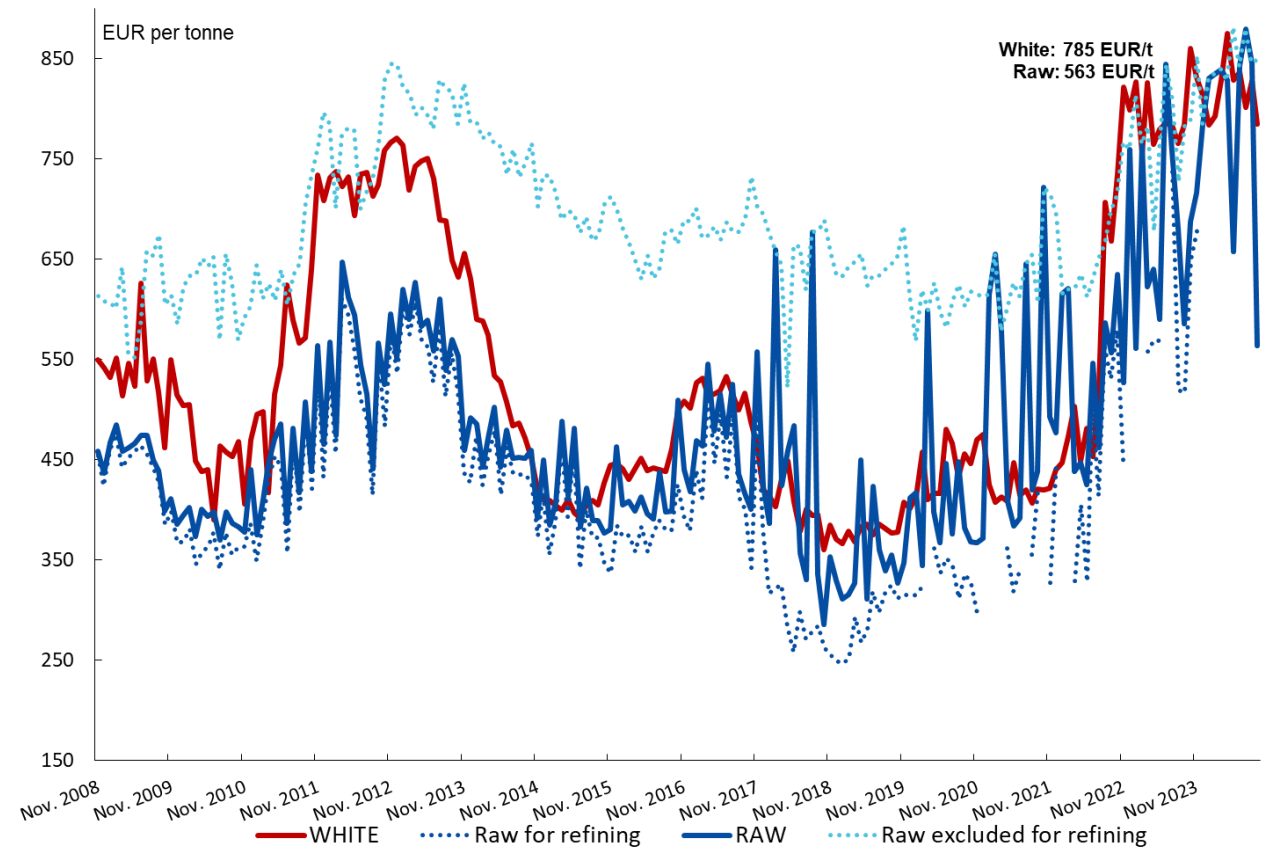
Legal basis: Commission Implementing Regulation (EU) 2017/1185 ANNEX II, point 3a

Source: MS notifications

EPA / EBA average import value

Date	Raw for refining		Raw excluded for refining	
	(EUR/tonne)	tonnes	(EUR/tonne)	tonnes
May 2024	552 €	31,909	882 €	15,080
Jun 2024	- €	0	842 €	8,931
July 2024	- €	0	880 €	9,456
Aug 2024	- €	0	846 €	9,180
Sep 2024	441 €	18,267	850 €	7,827

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





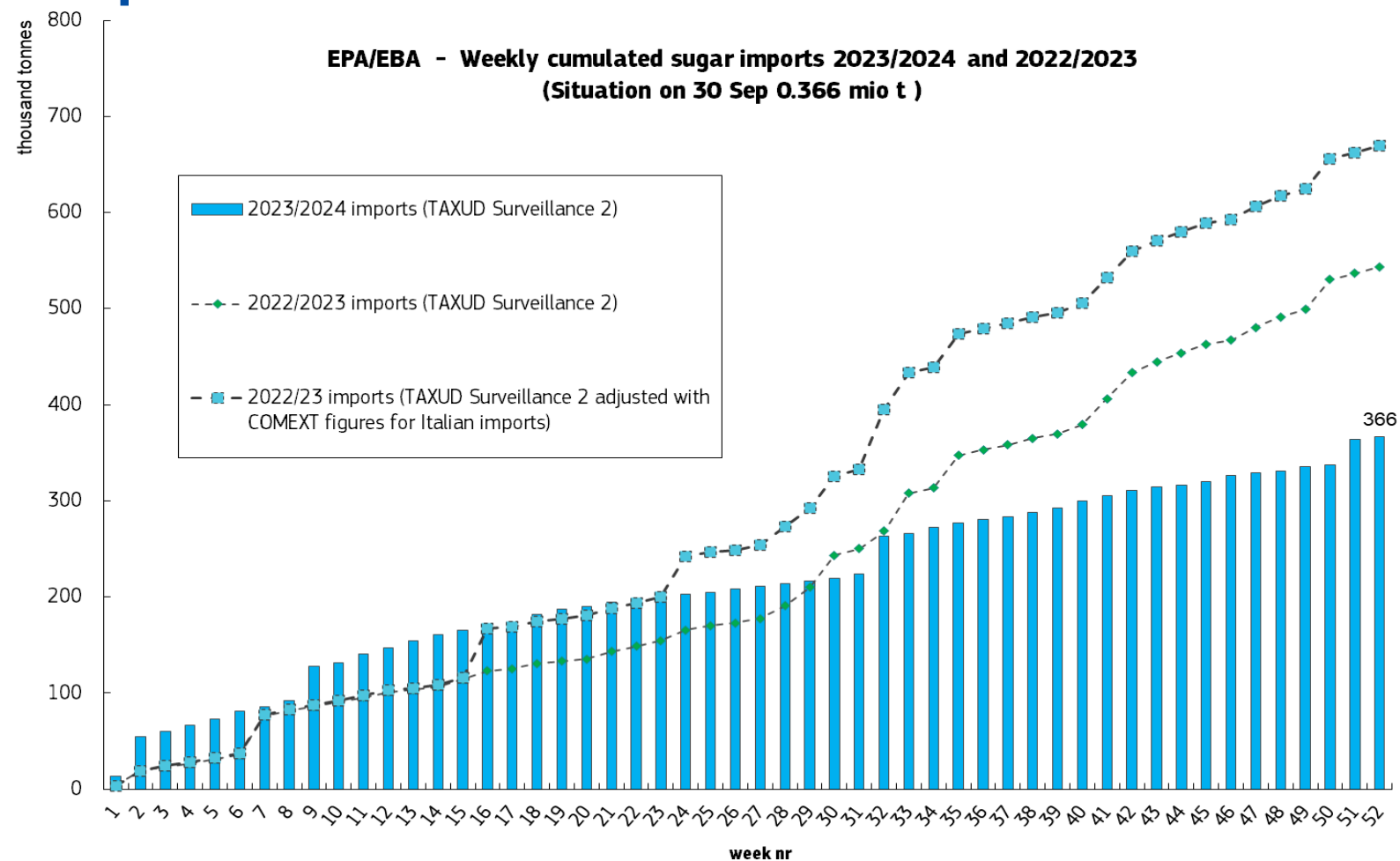
Sugar Trade statistics

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

06 December 2024

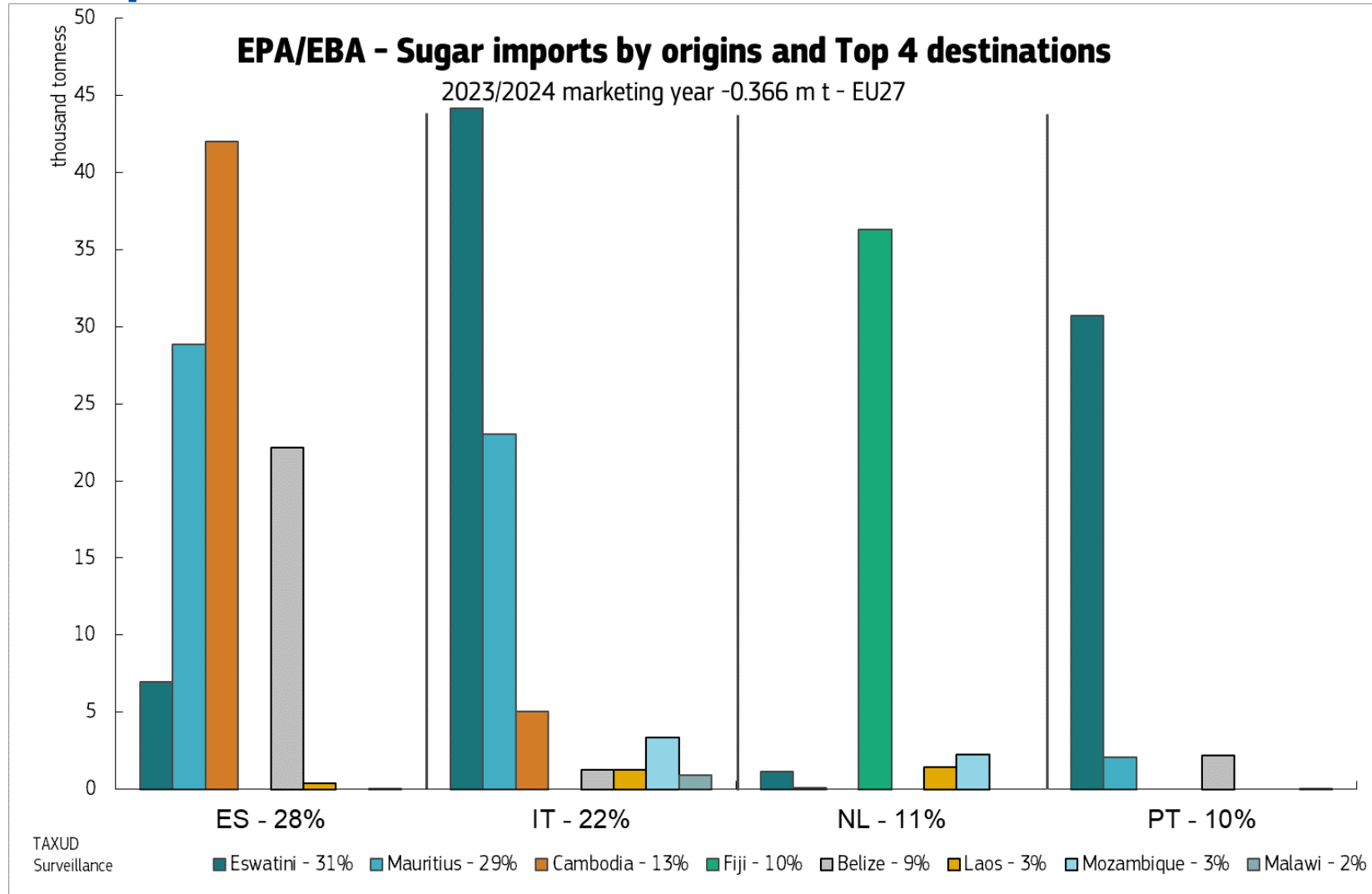
MY 2023-2024

Imports EPA / EBA in 2023/2024

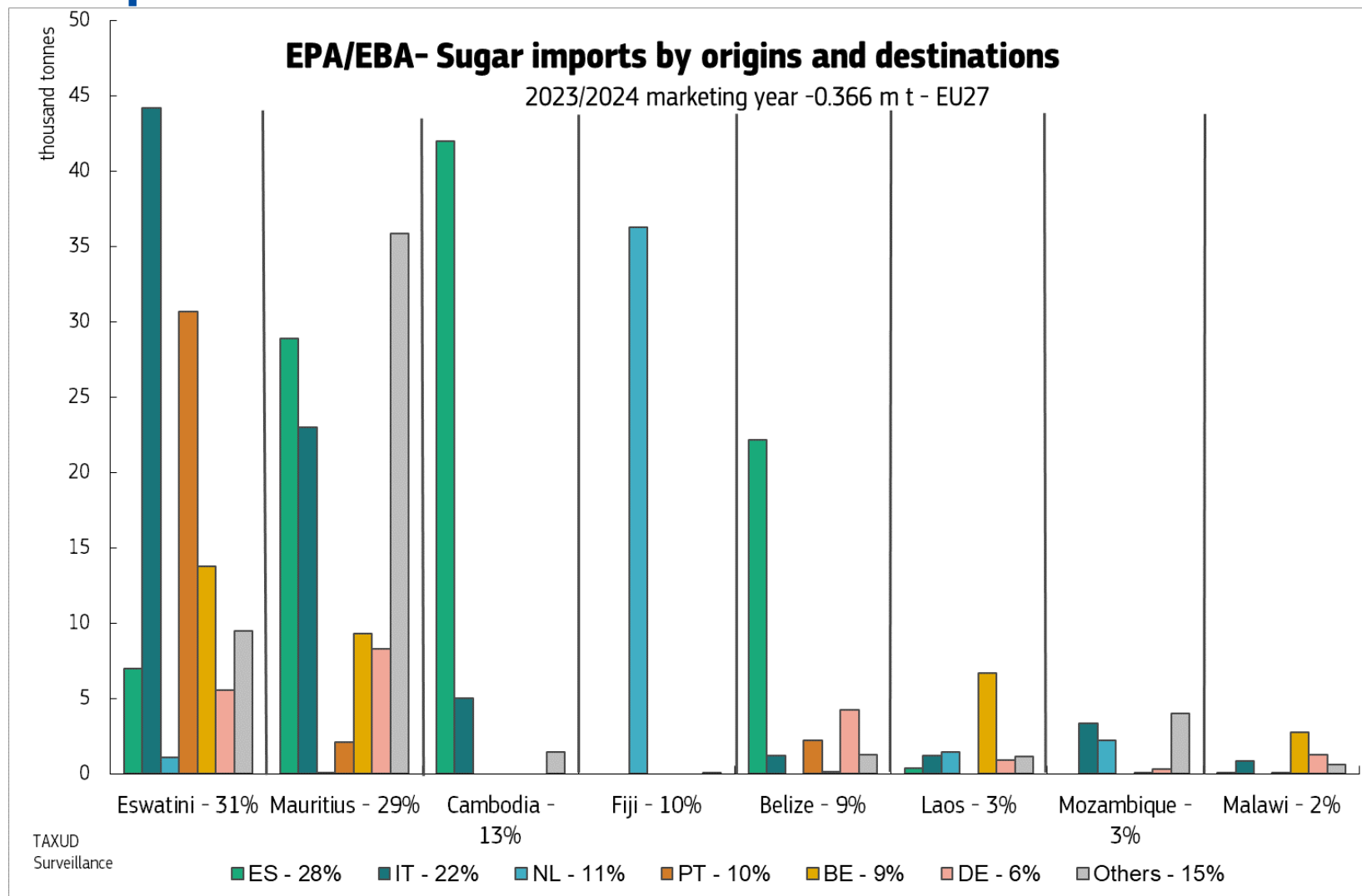


Source: DG TAXUD - DG AGRI,

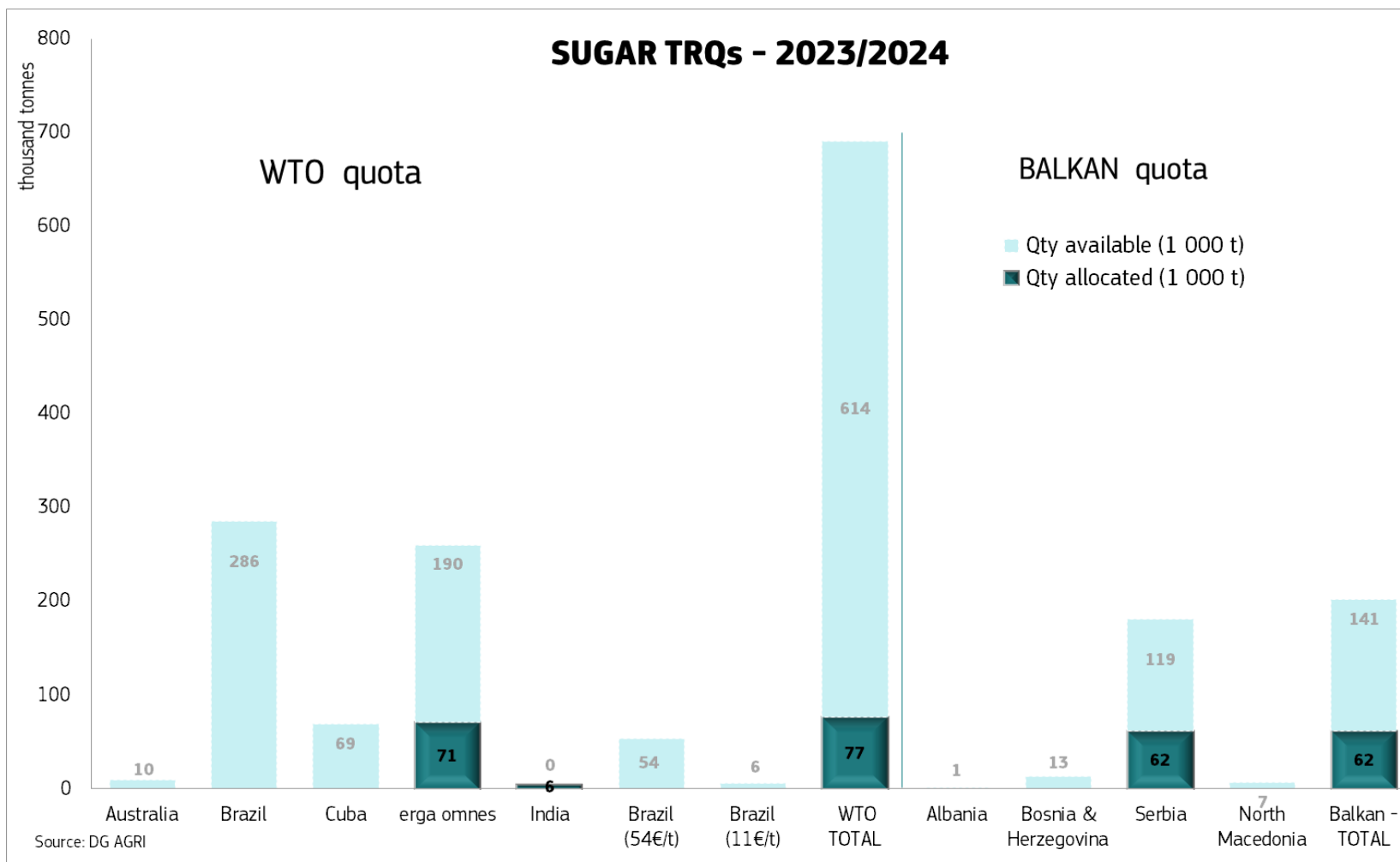
Imports EPA / EBA in 2023/2024



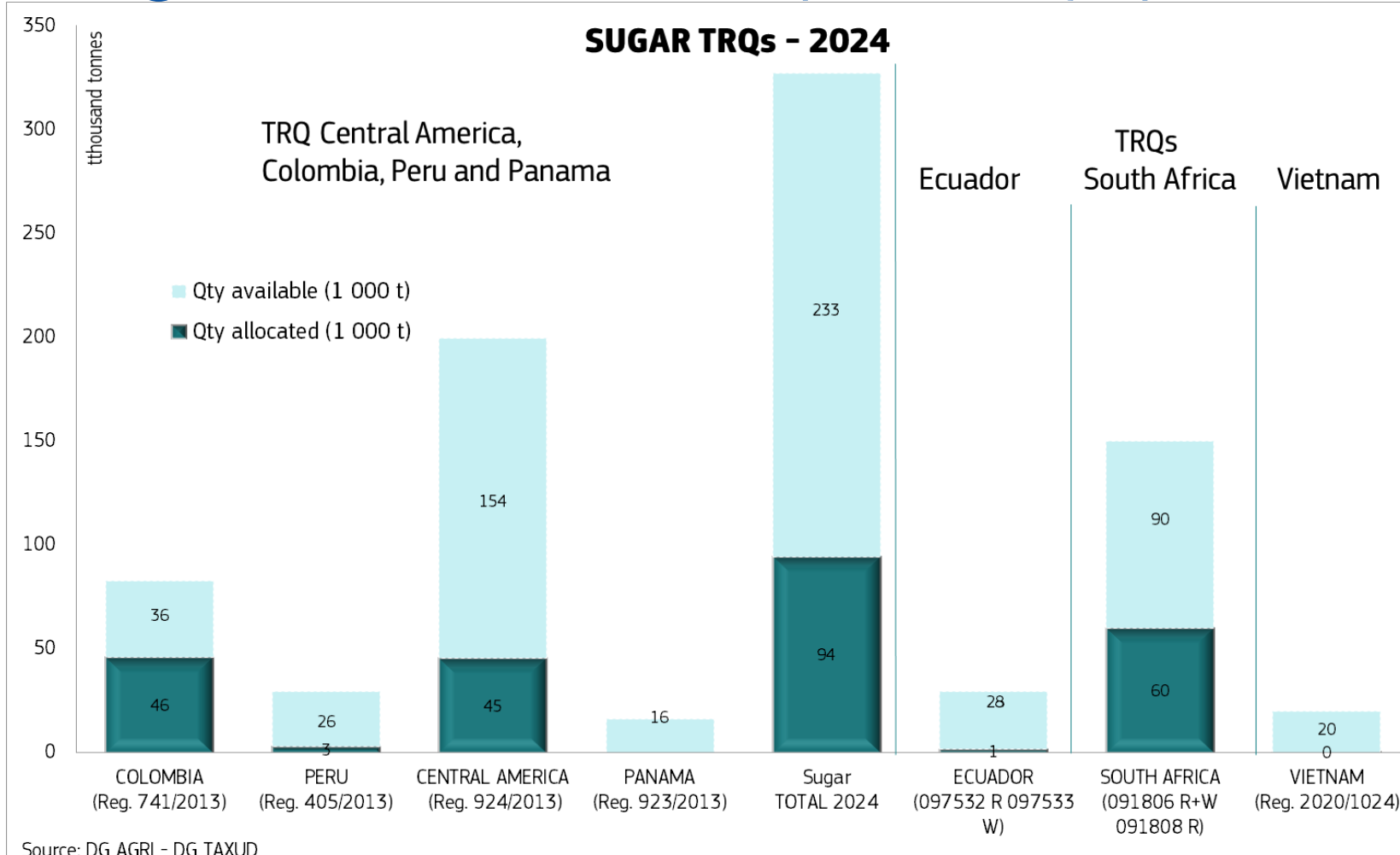
Imports EPA / EBA in 2023/2024



Sugar TRQs 2023-2024 (26/08/2024)



Sugar TRQs 2024 (EU 27) (26/09/2024)



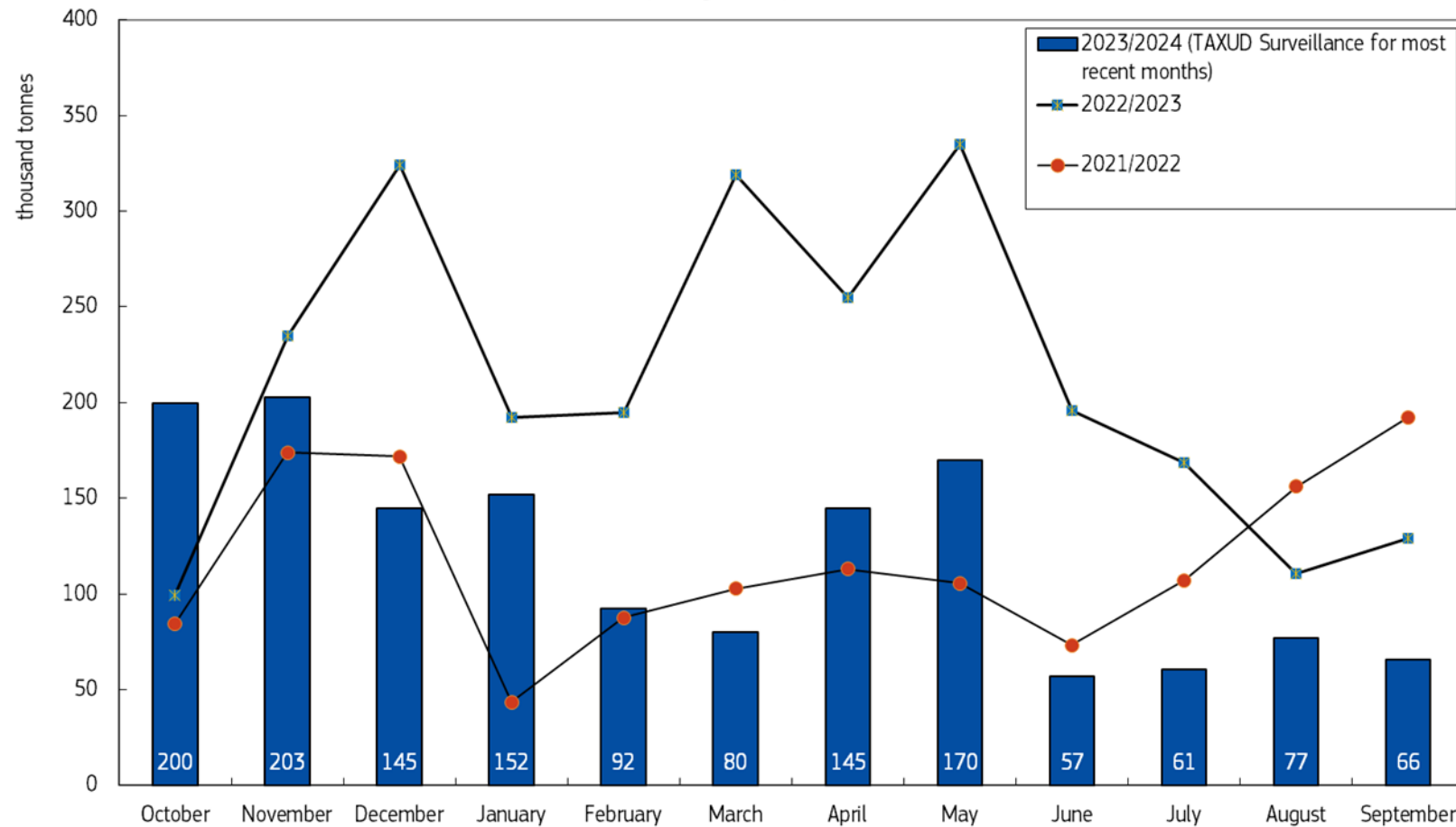
EU Total Sugar Trade Flows

EU Sugar Imports

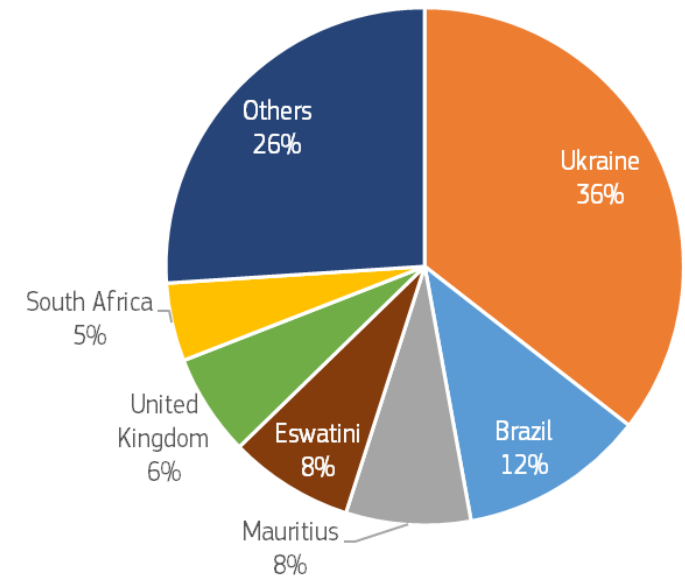
EU Total imports

Figures for 2023 under revision

EU Monthly sugar imports (CN 1701)



Sources: EUROSTAT

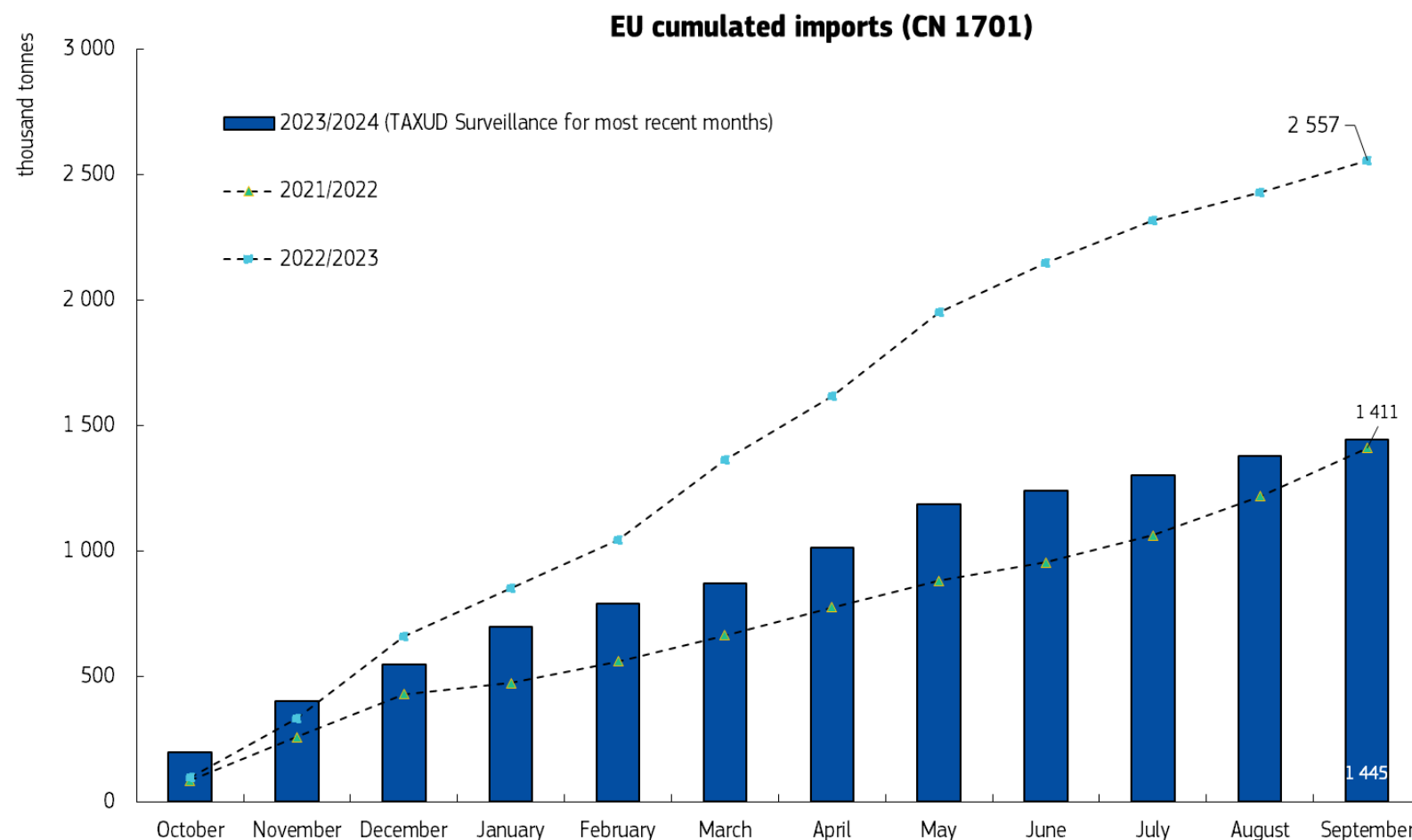


EU imports by main origins in Marketing Year 2023/24 (COMEXT)

UK figures might be revised for September 2024.

EU Total imports

Figures for 2023 under revision



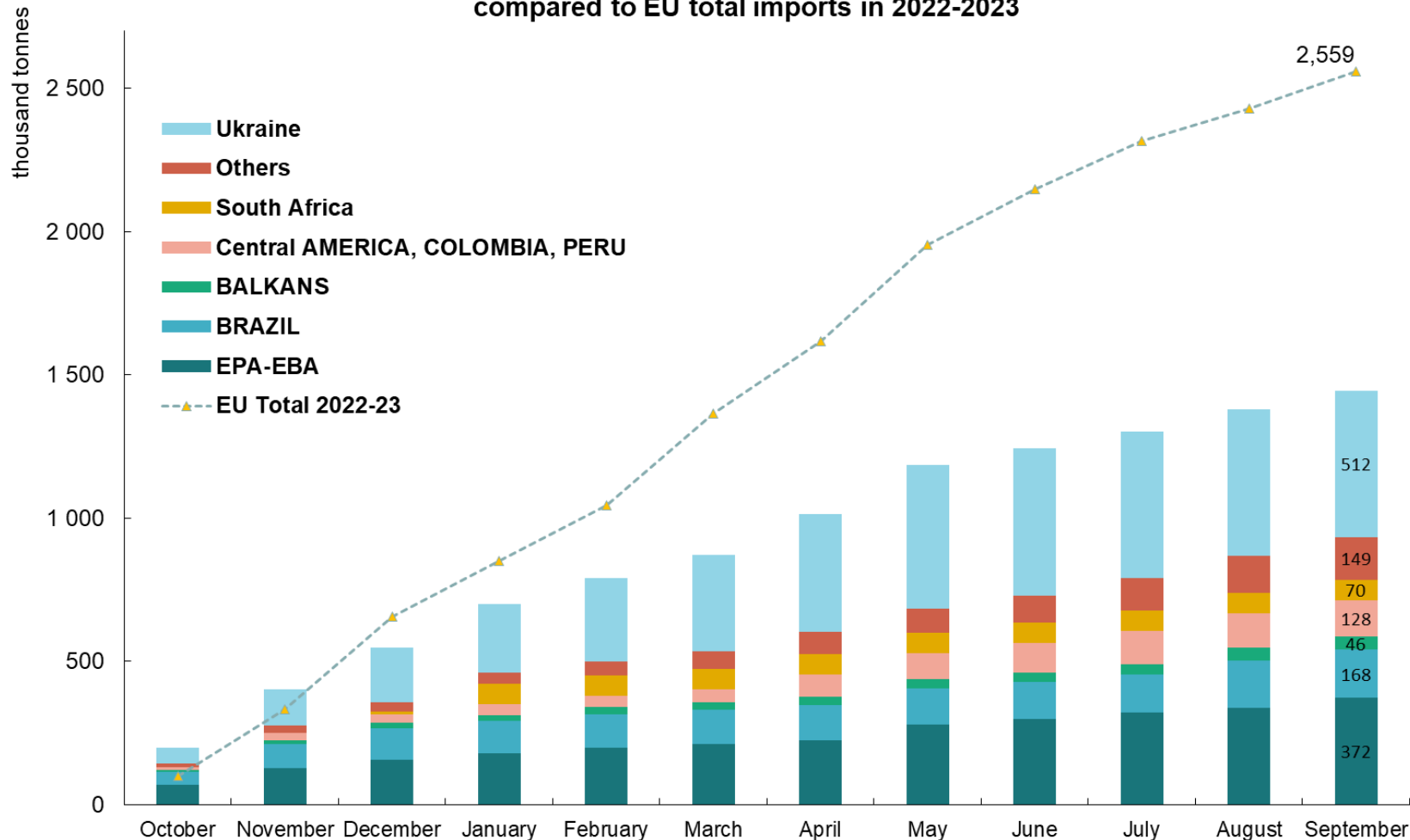
Source: EUROSTAT, Taxud

UK figures might be revised for September 2024.

EU Total imports

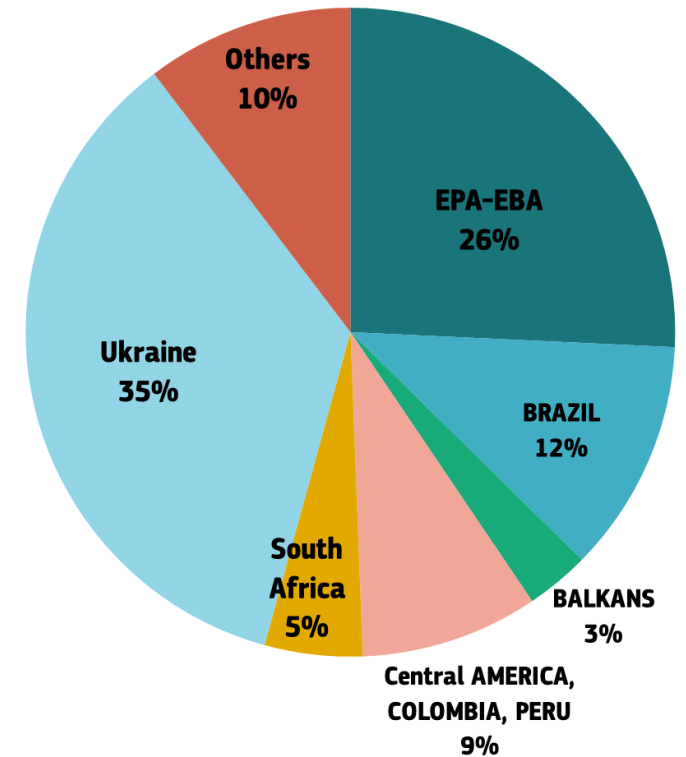
Figures for 2023 under revision

EU Sugar main imports origins in 2023-2024
compared to EU total imports in 2022-2023



Source: EUROSTAT

UK figures might be revised for September 2024.

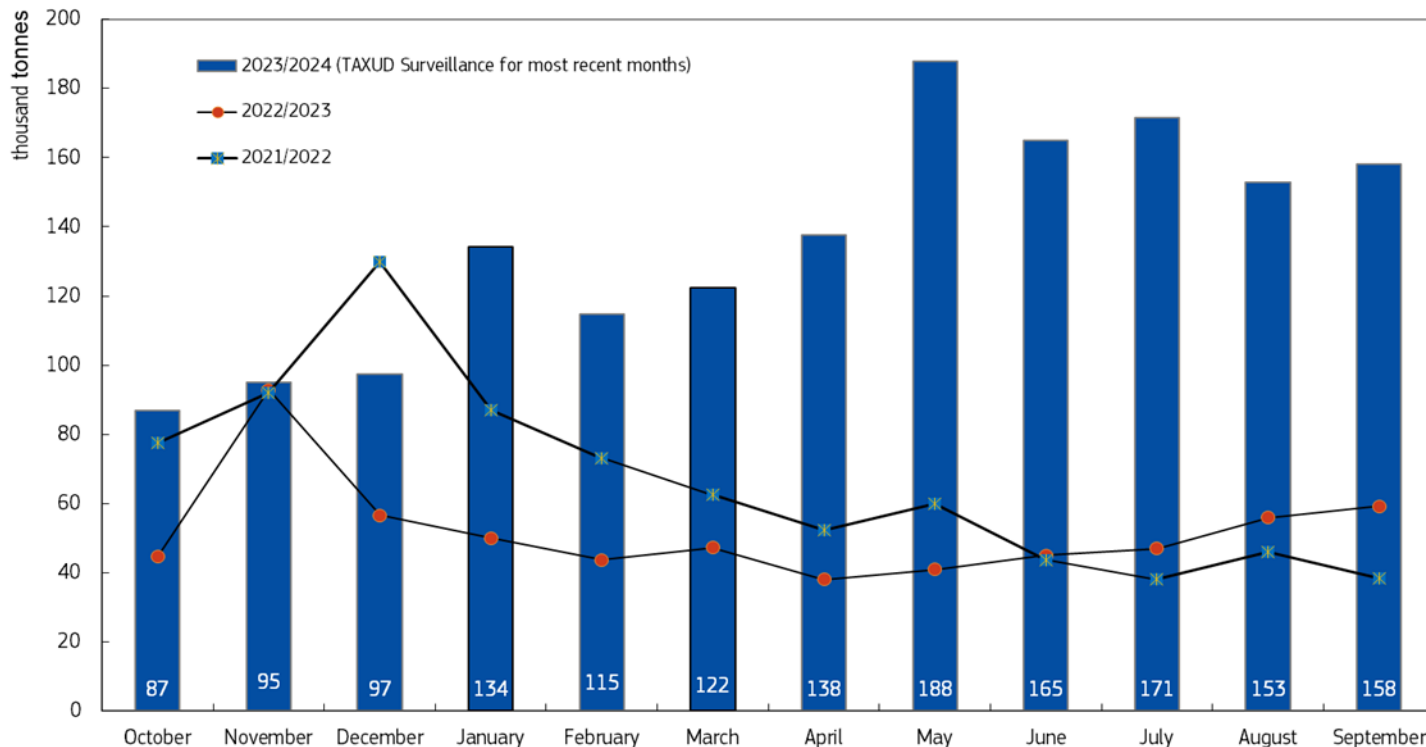


EU Sugar Exports

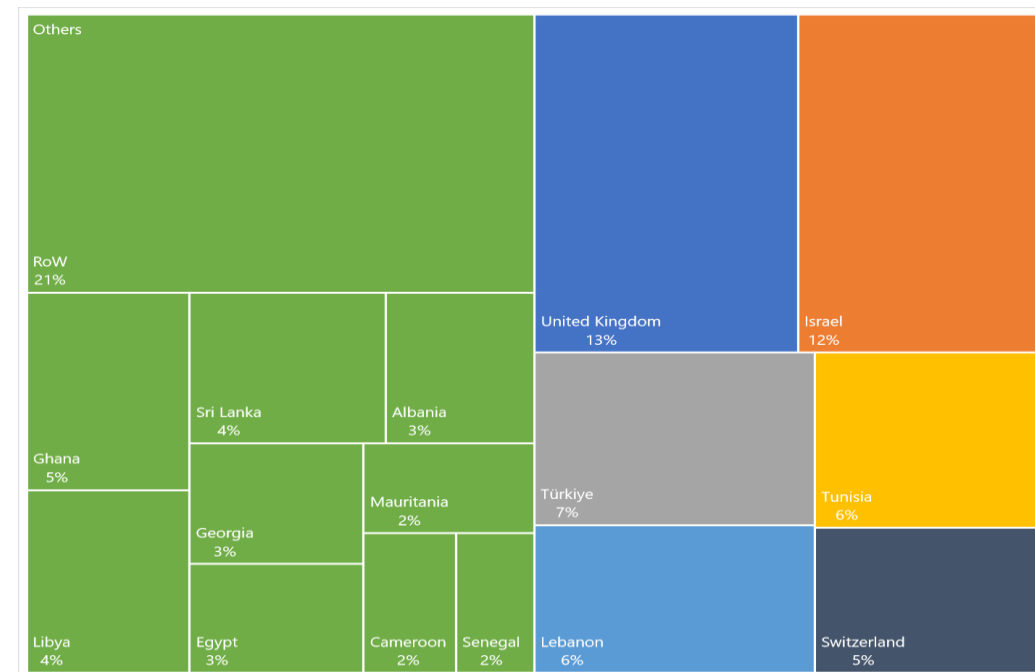
EU Total exports

Figures for 2023 under revision

EU Monthly sugar exports (CN 1701)



Source: EUROSTAT -

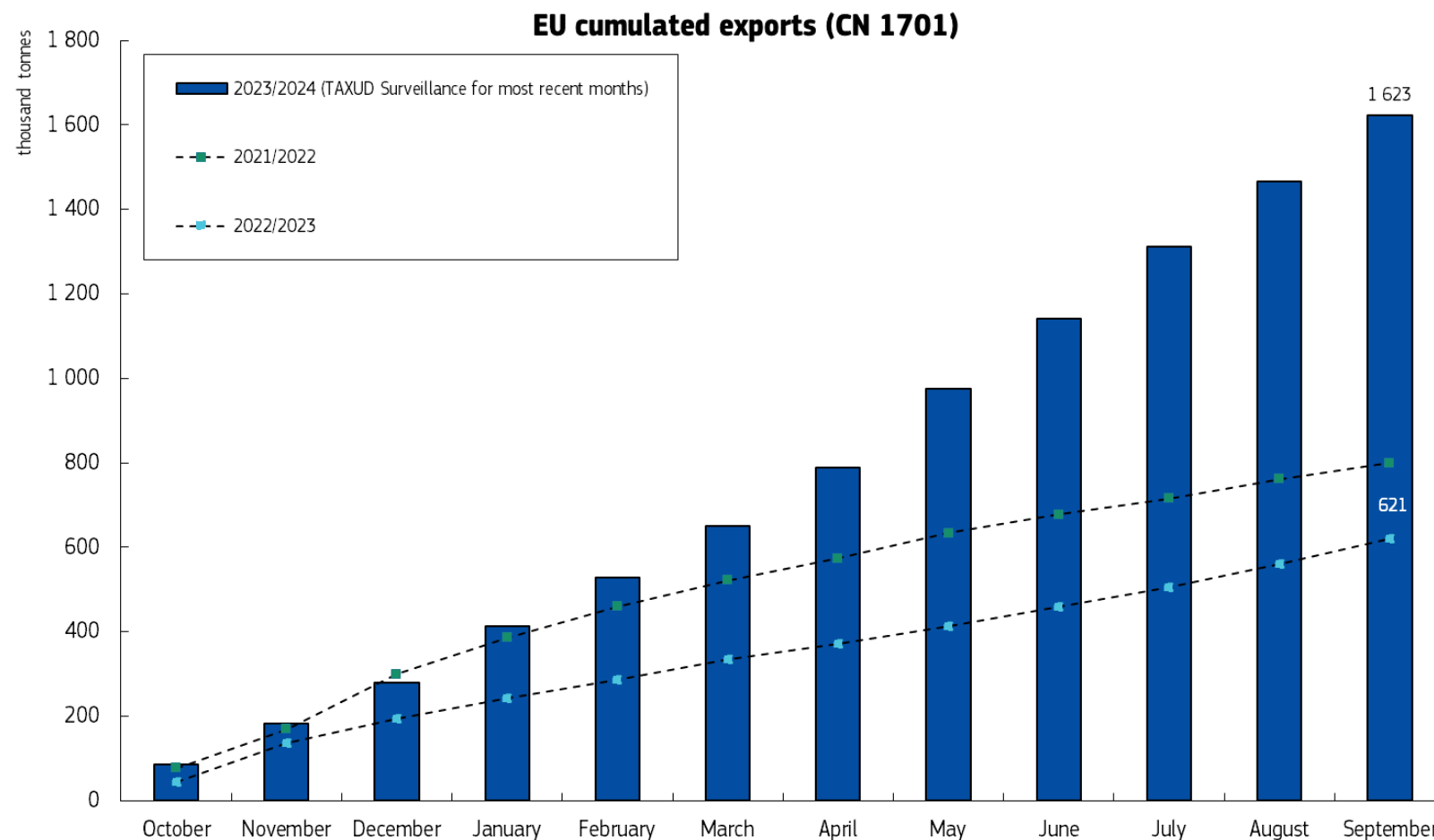


EU exports by main destination in Marketing Year 2023/24 (COMEXT)

UK figures might be revised for September 2024.

EU Total exports

Figures for 2023 under revision



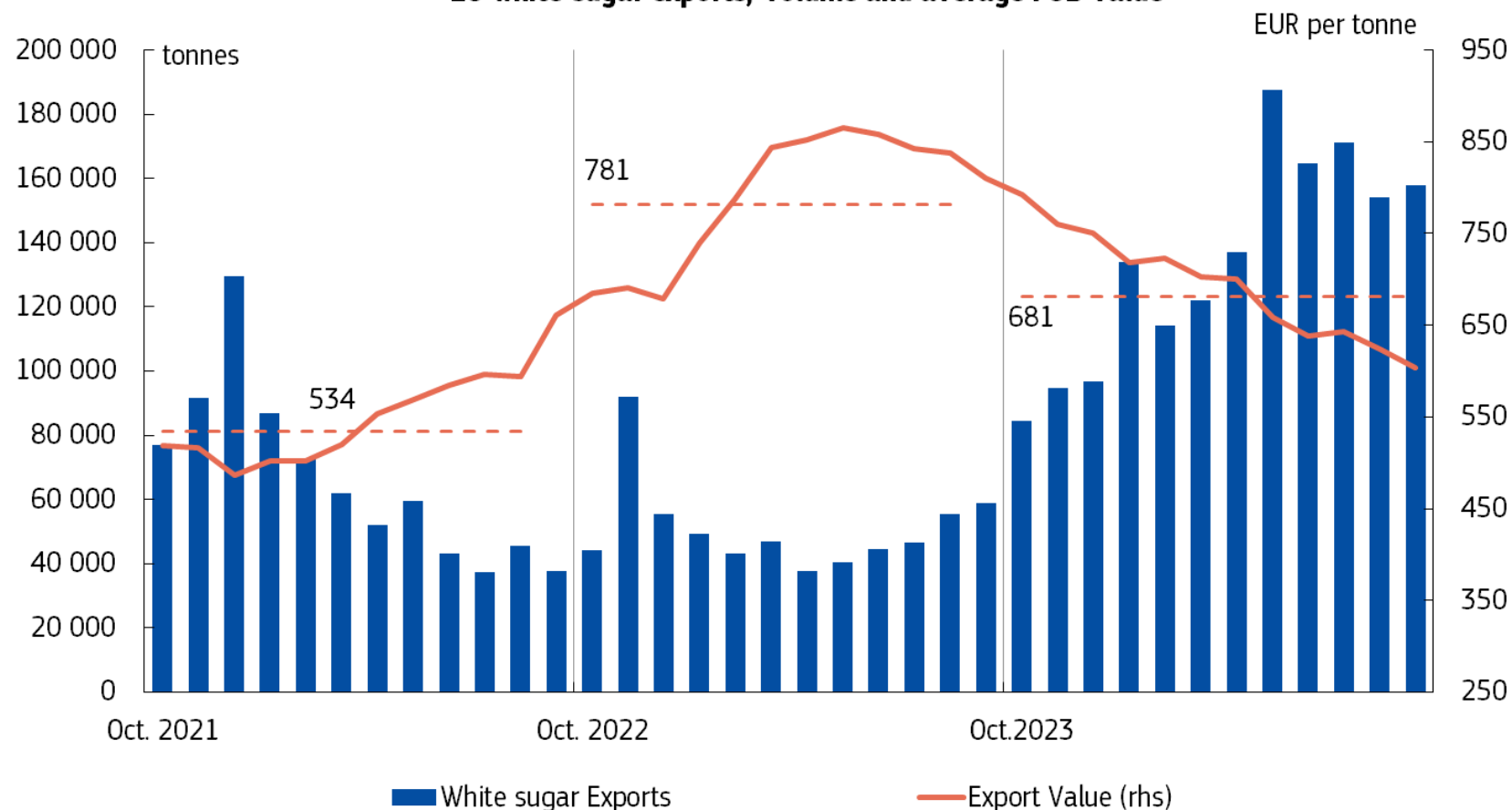
Source: EUROSTAT- DG TAXUD

UK figures might be revised for September 2024.

EU White sugar exports

Figures for 2023 under revision

EU white sugar exports, volume and average FOB value

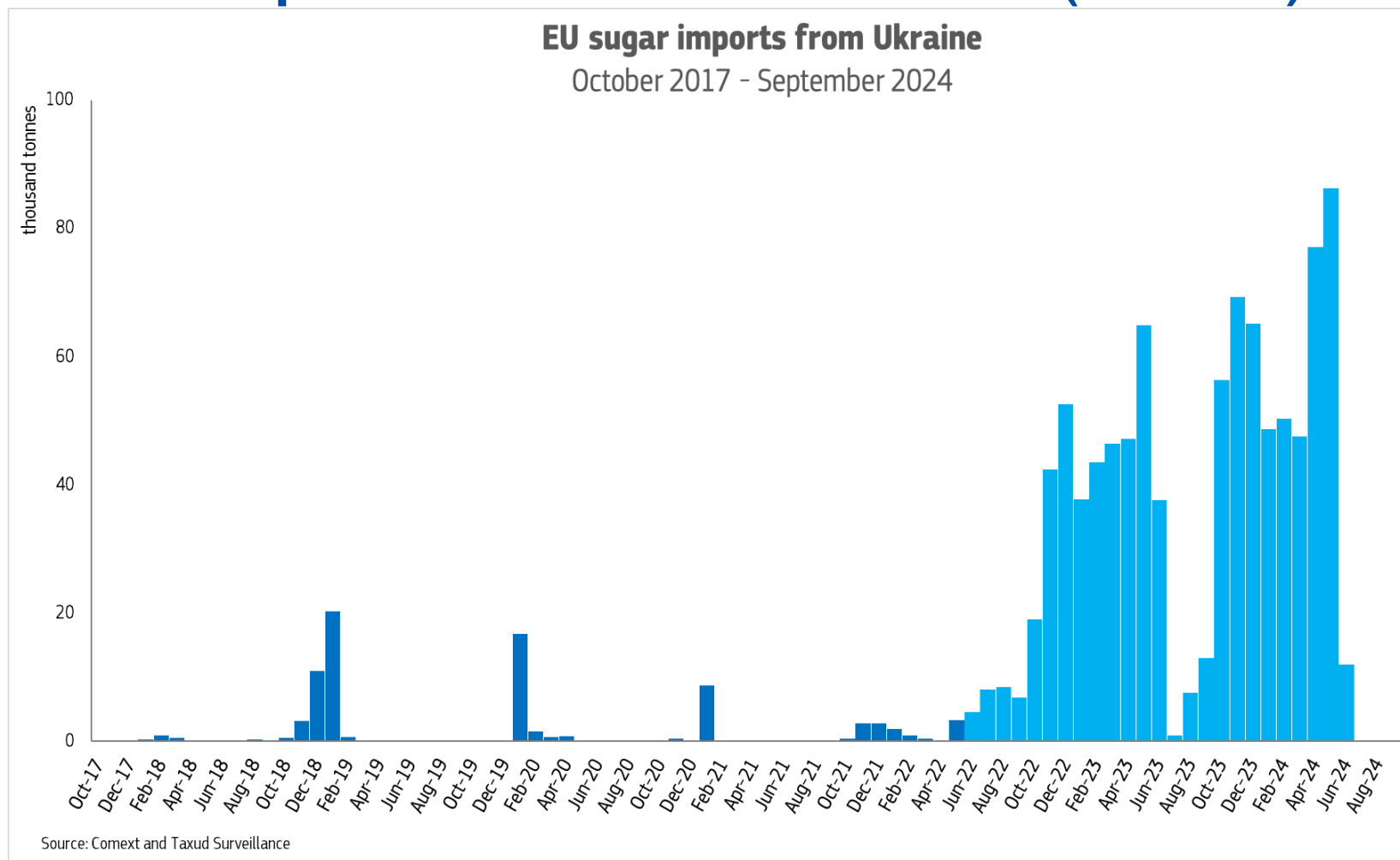


Source: EUROSTAT.

UK figures might be revised for September 2024

Focus on Ukraine

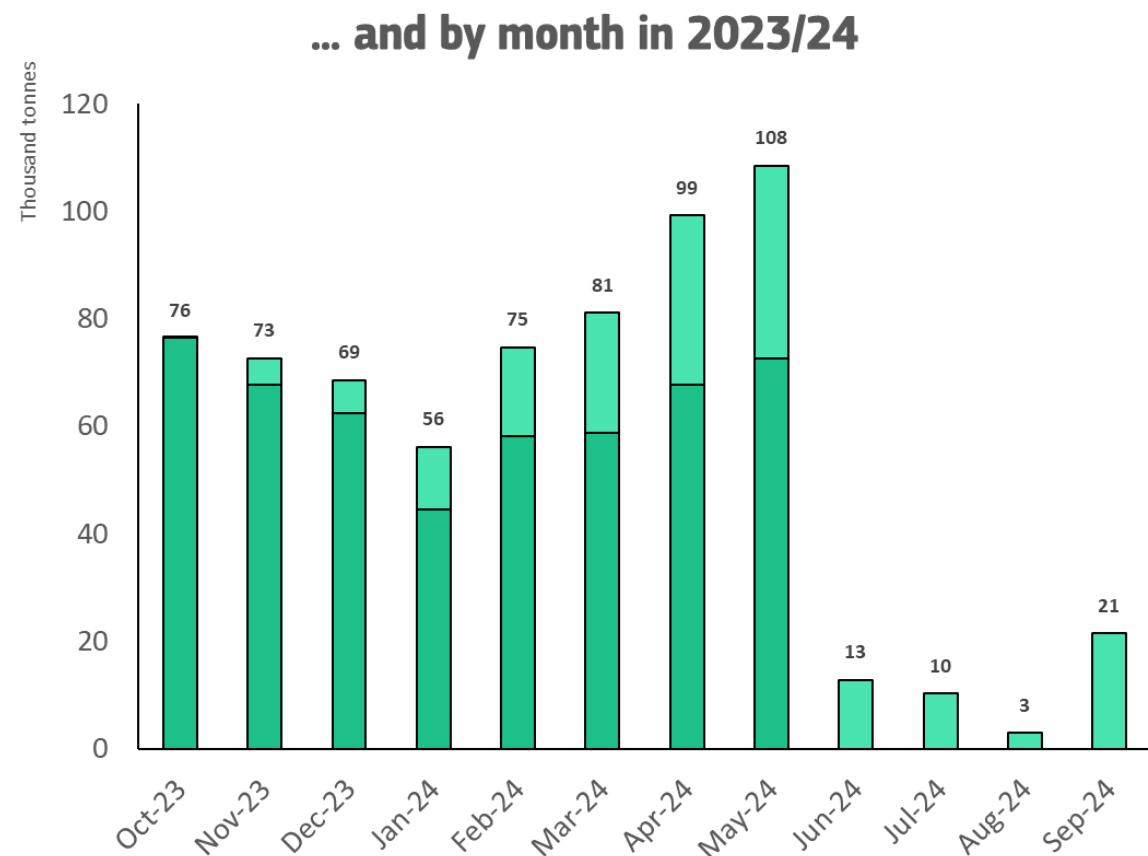
EU imports from Ukraine (1701)



Imports for September 2024 from TAXUD Surveillance at zero. In light blue import data from June 2022 onwards, when the suspension of import duties started. 5/06/2023 -15/09/2023 Ukrainian sugar export ban in force.

Zero quota for UA sugar exports to the EU, according to the Resolution of the Cabinet of Ministers of Ukraine of 30 May 2024, in force as from 1 June 2024. As of 2nd July 2024 the tariff rate quotas from the Deep and Comprehensive Free Trade Area (DCFTA) are reintroduced for EU imports of sugar from Ukraine.

Ukrainian sugar exports (CN 1701)



Zero quota for UA sugar exports to the EU, according to the Resolution of the Cabinet of Ministers of Ukraine of 30 May 2024, implemented as from 1 June 2024.

UA exports to the EU at zero since June 2024

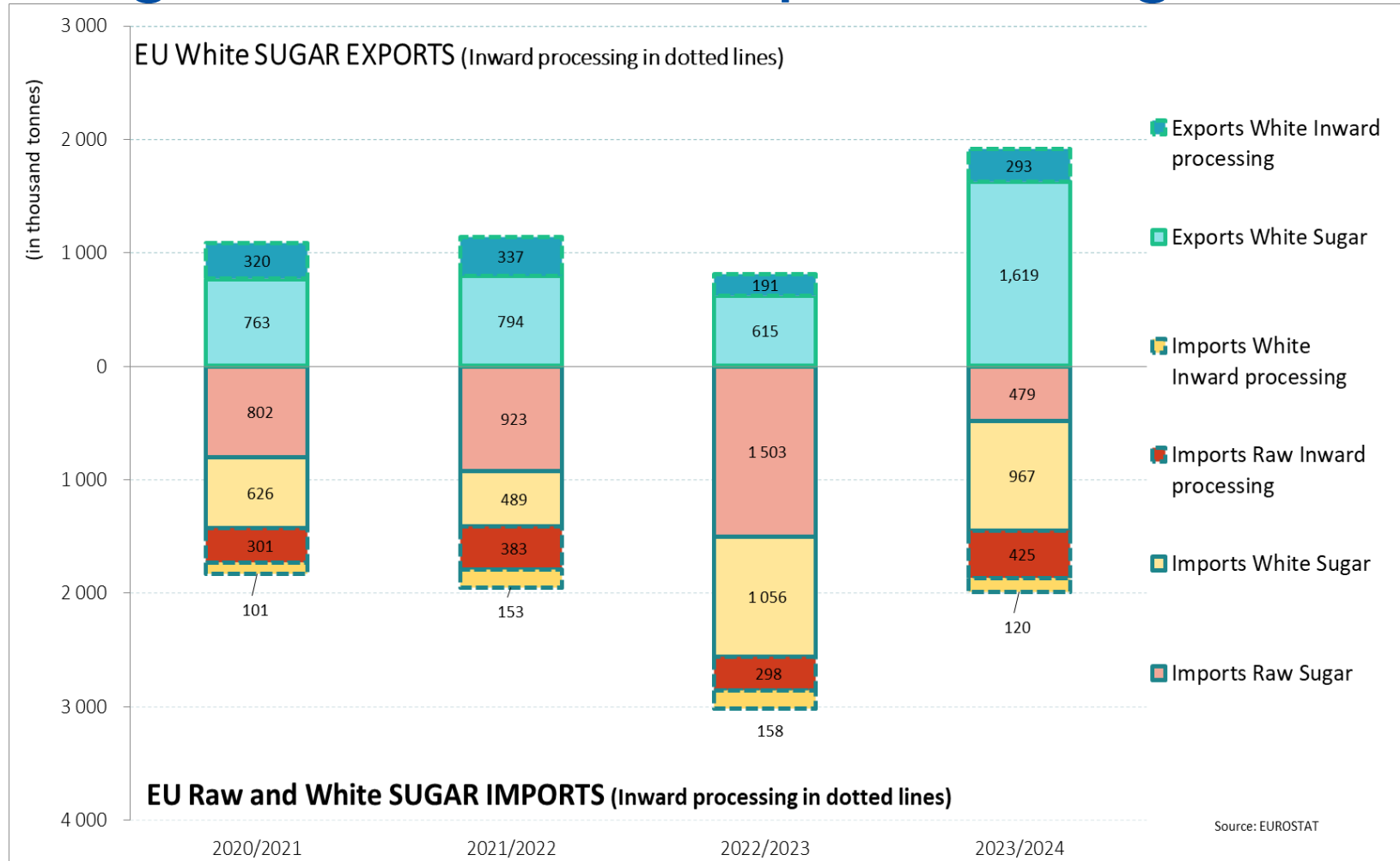
Marketing year: October- September.

Source: GTA, ITC and Ukrainian customs.

EU Sugar Trade –Normal & Inward processing regimes

Sugar trade- Inward processing

Figures for 2023 under revision

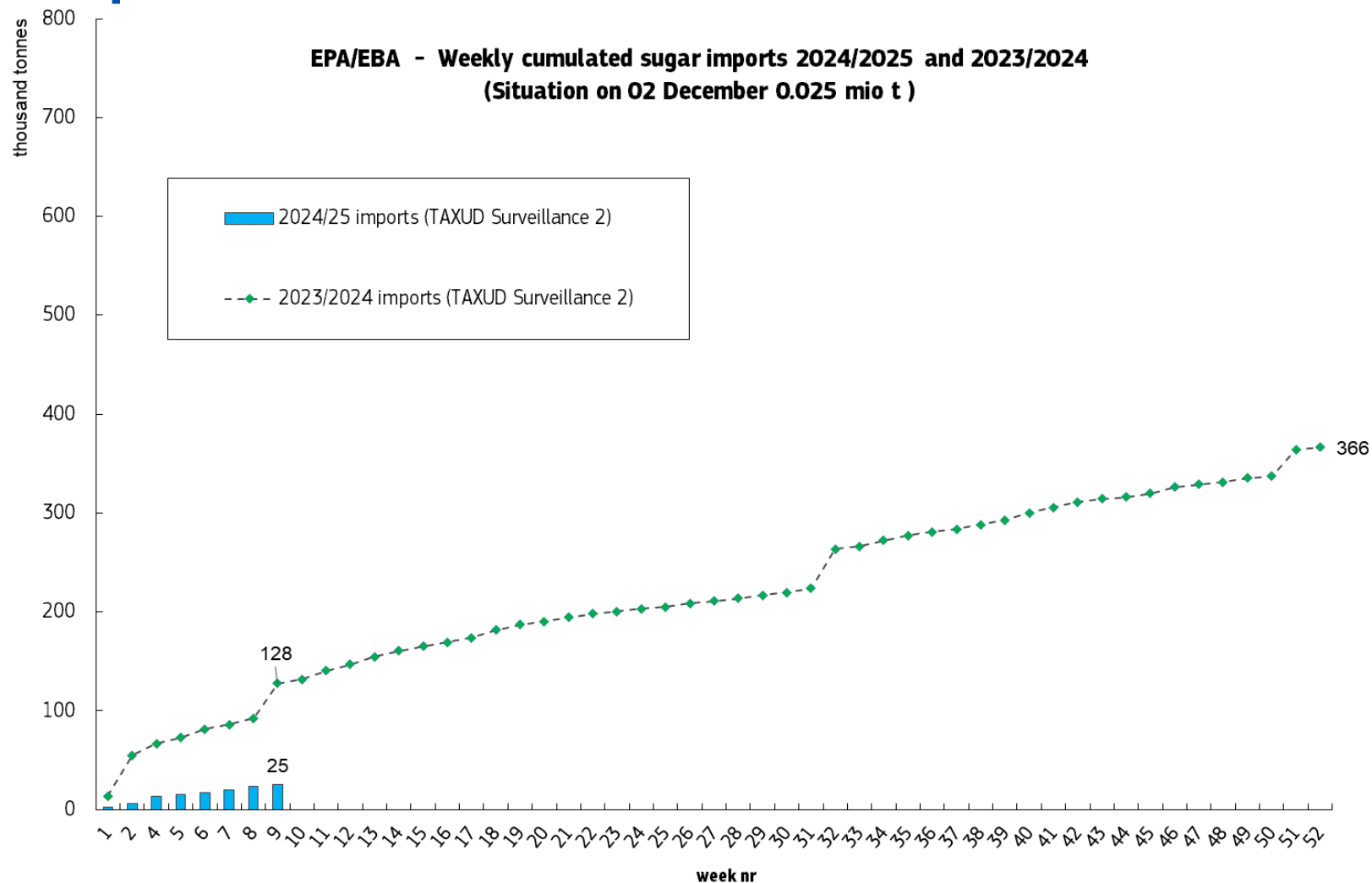


UK figures might be revised for September 2024

Source: Comext

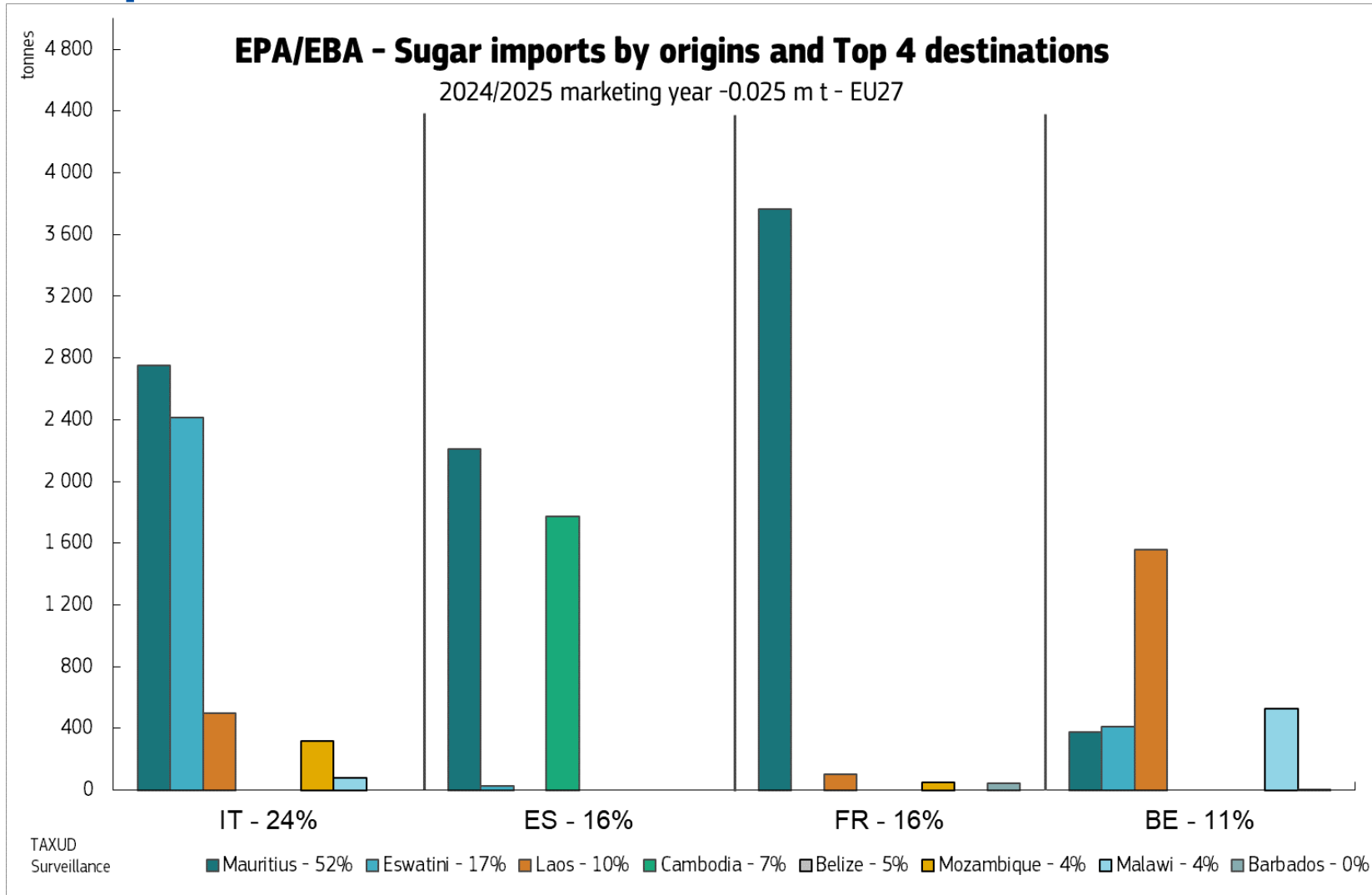
MY 2024-2025

Imports EPA / EBA in 2024/2025

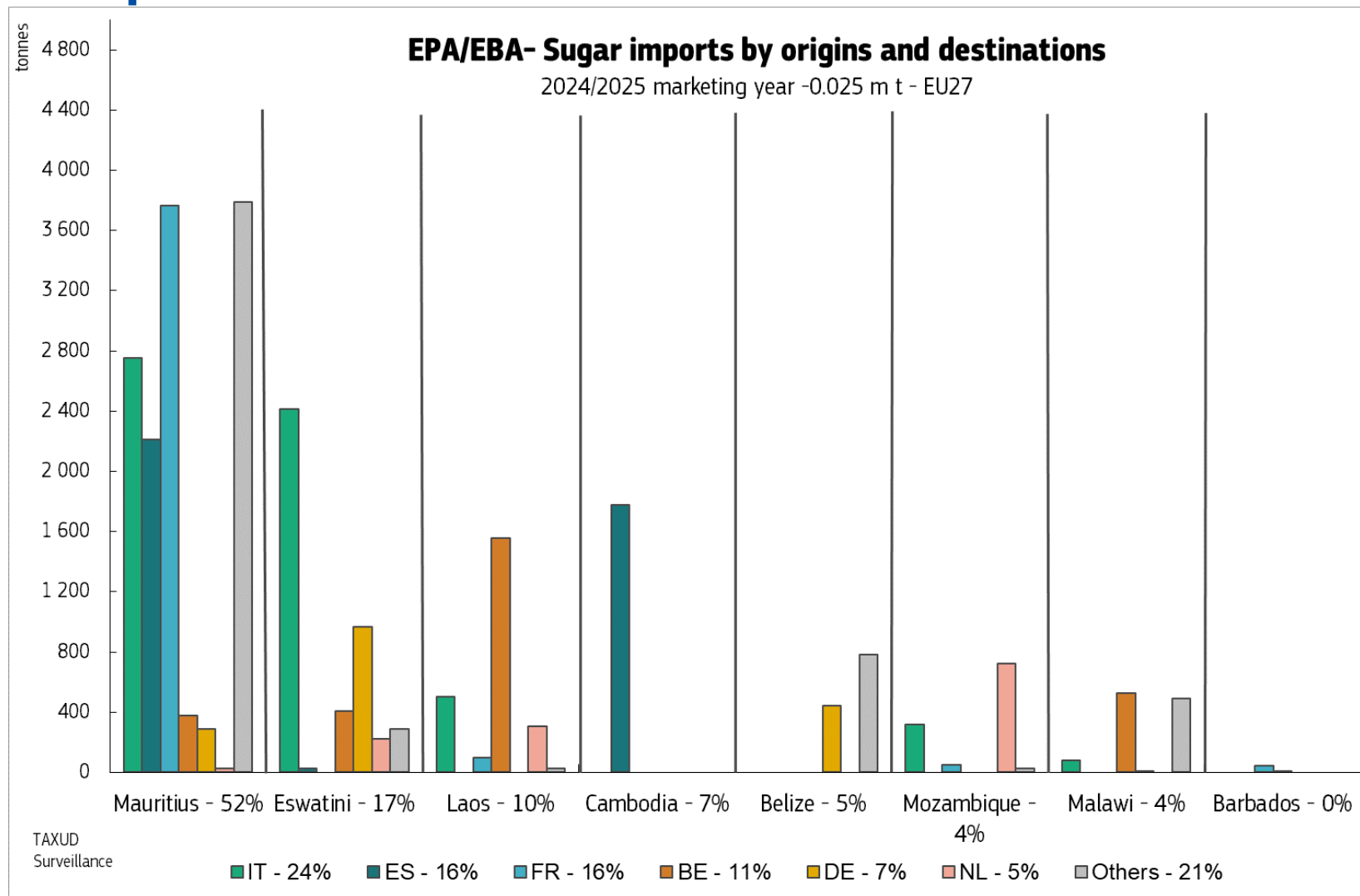


Source: DG TAXUD - DG AGRI,

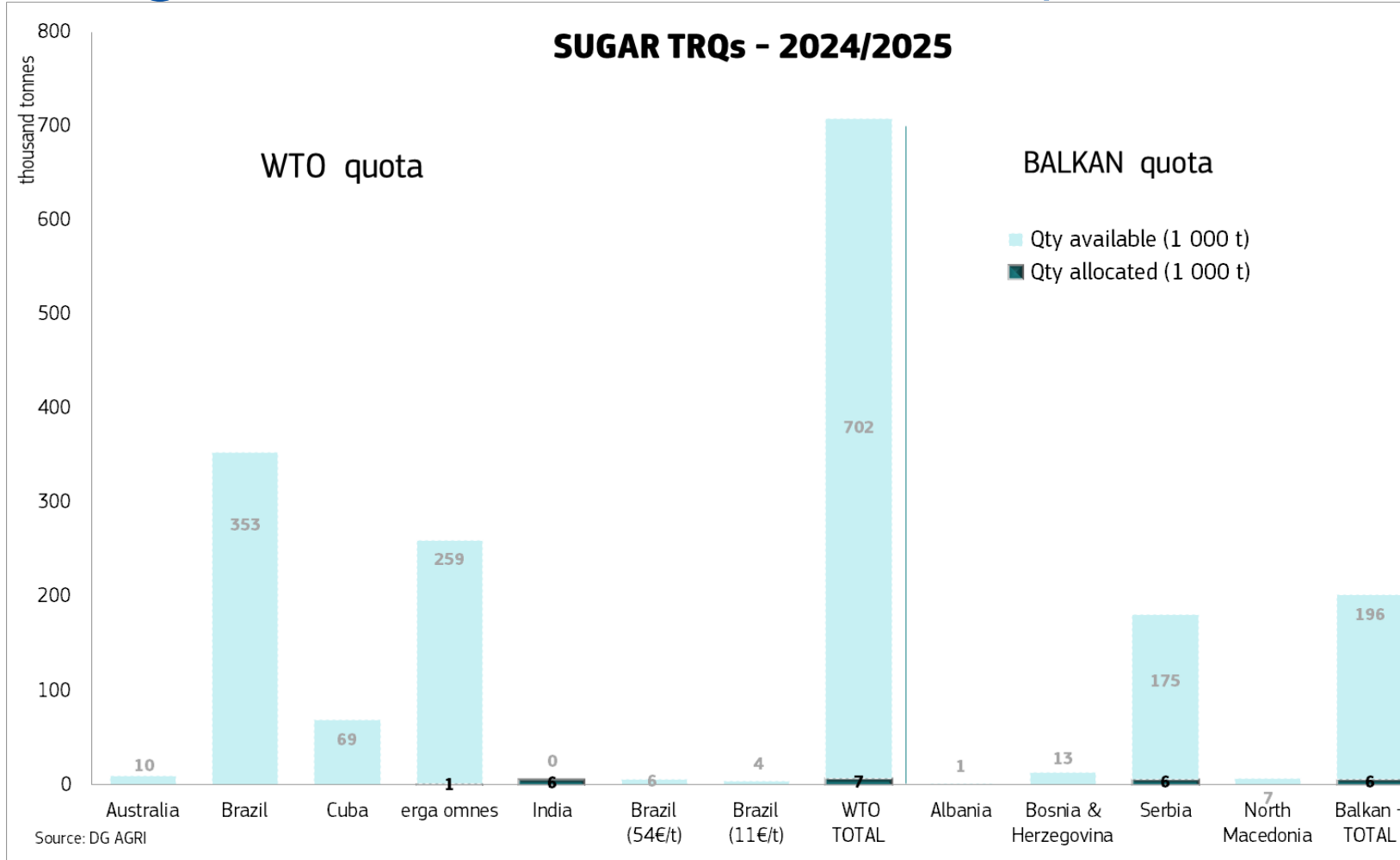
Imports EPA / EBA in 2024/2025



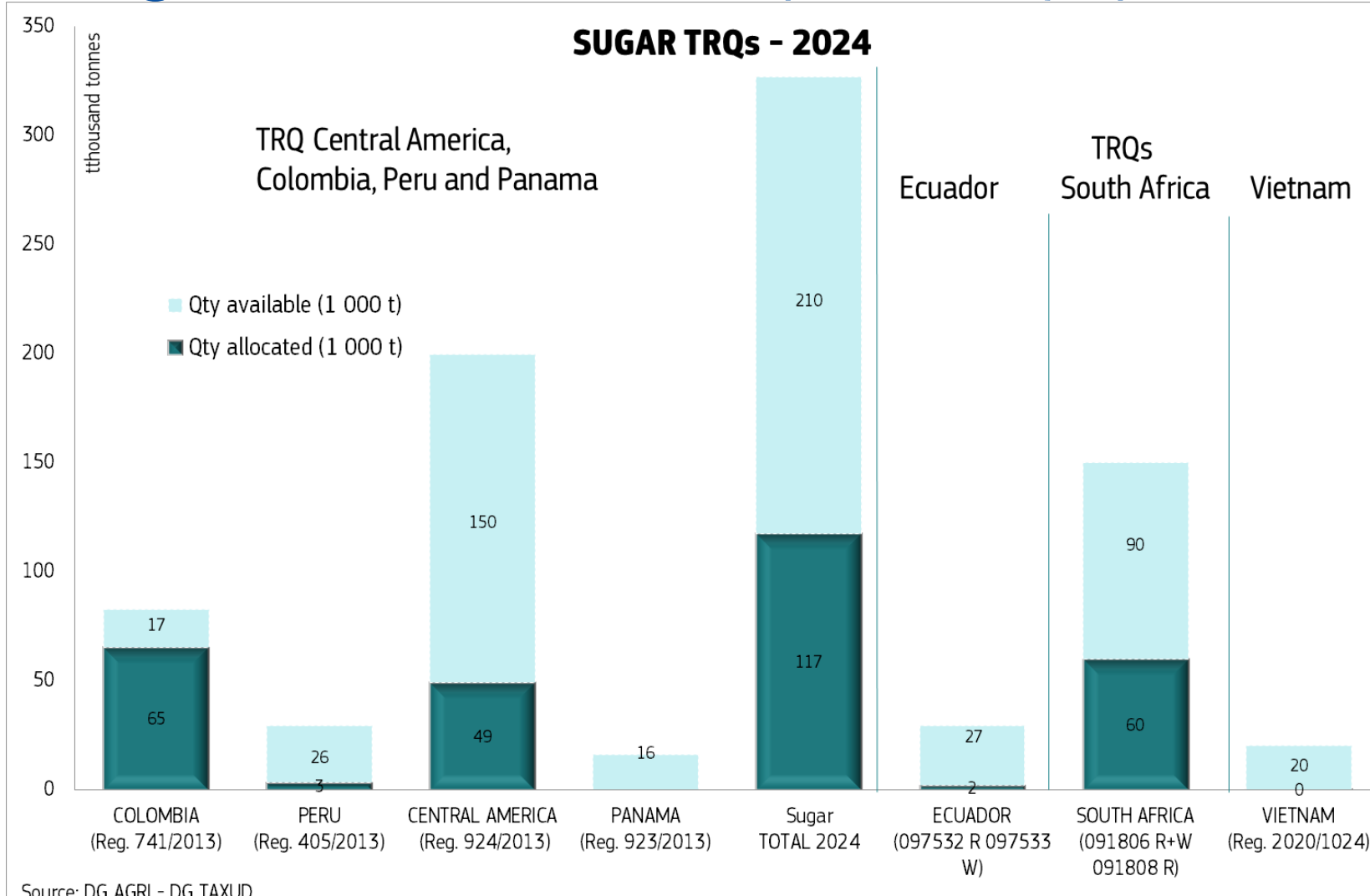
Imports EPA / EBA in 2024/2025



Sugar TRQs 2024-2025 (22/11/2024)



Sugar TRQs 2024 (EU 27) (25/11/2024)

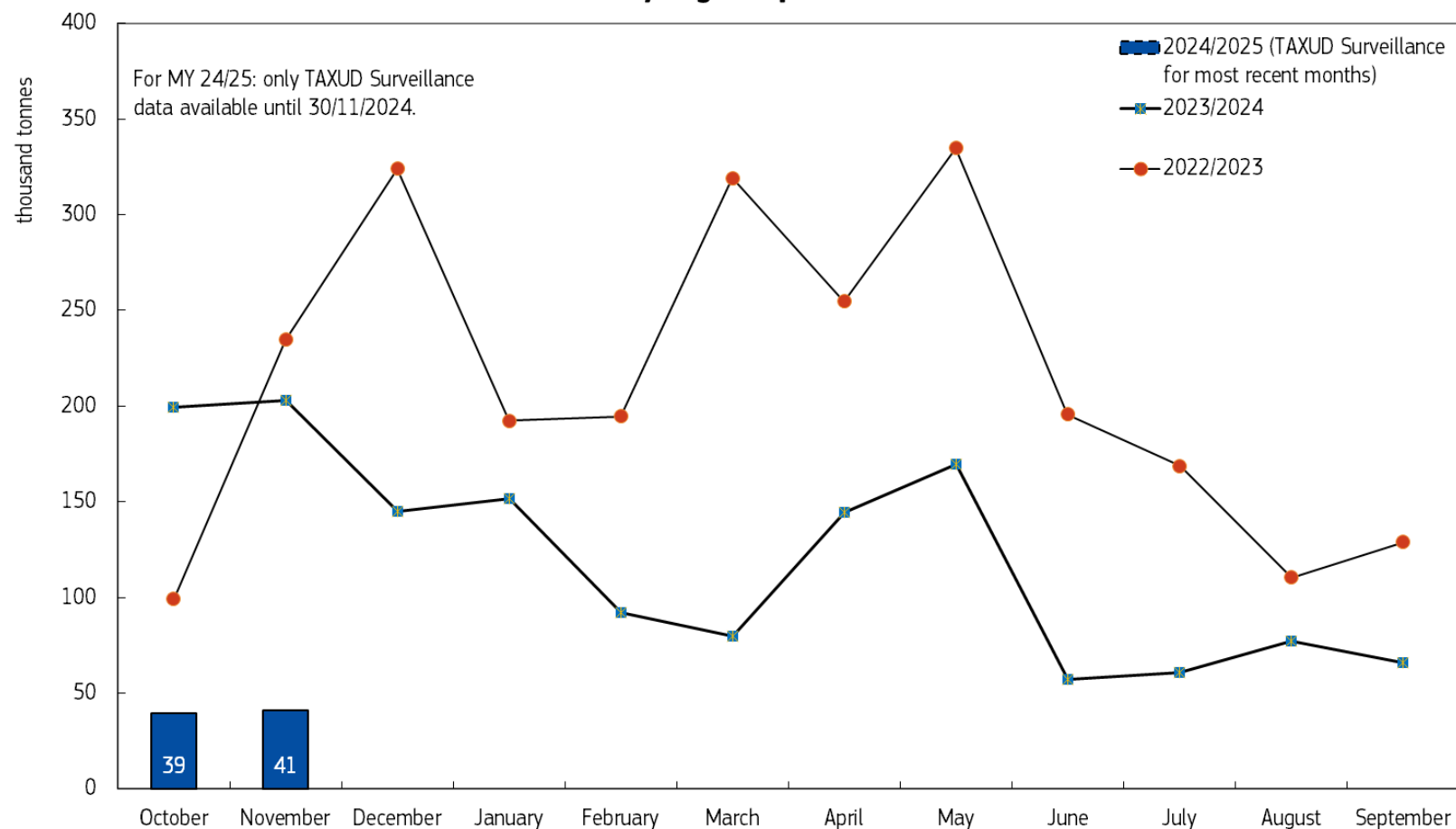


EU Total Sugar Trade Flows

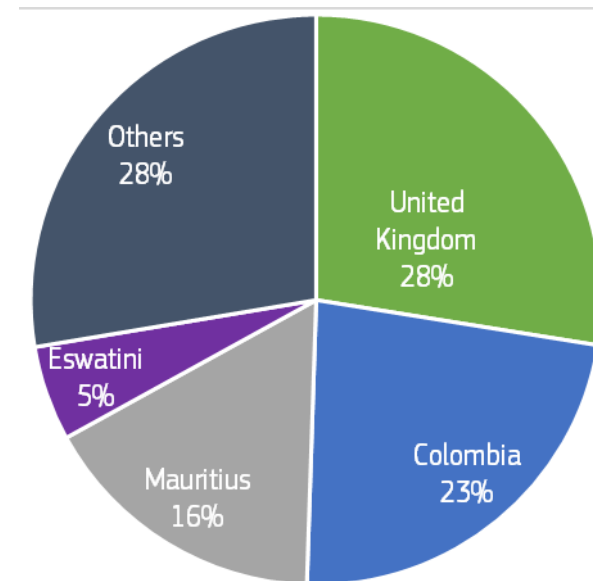
EU Sugar Imports

EU Total imports

EU Monthly sugar imports (CN 1701)

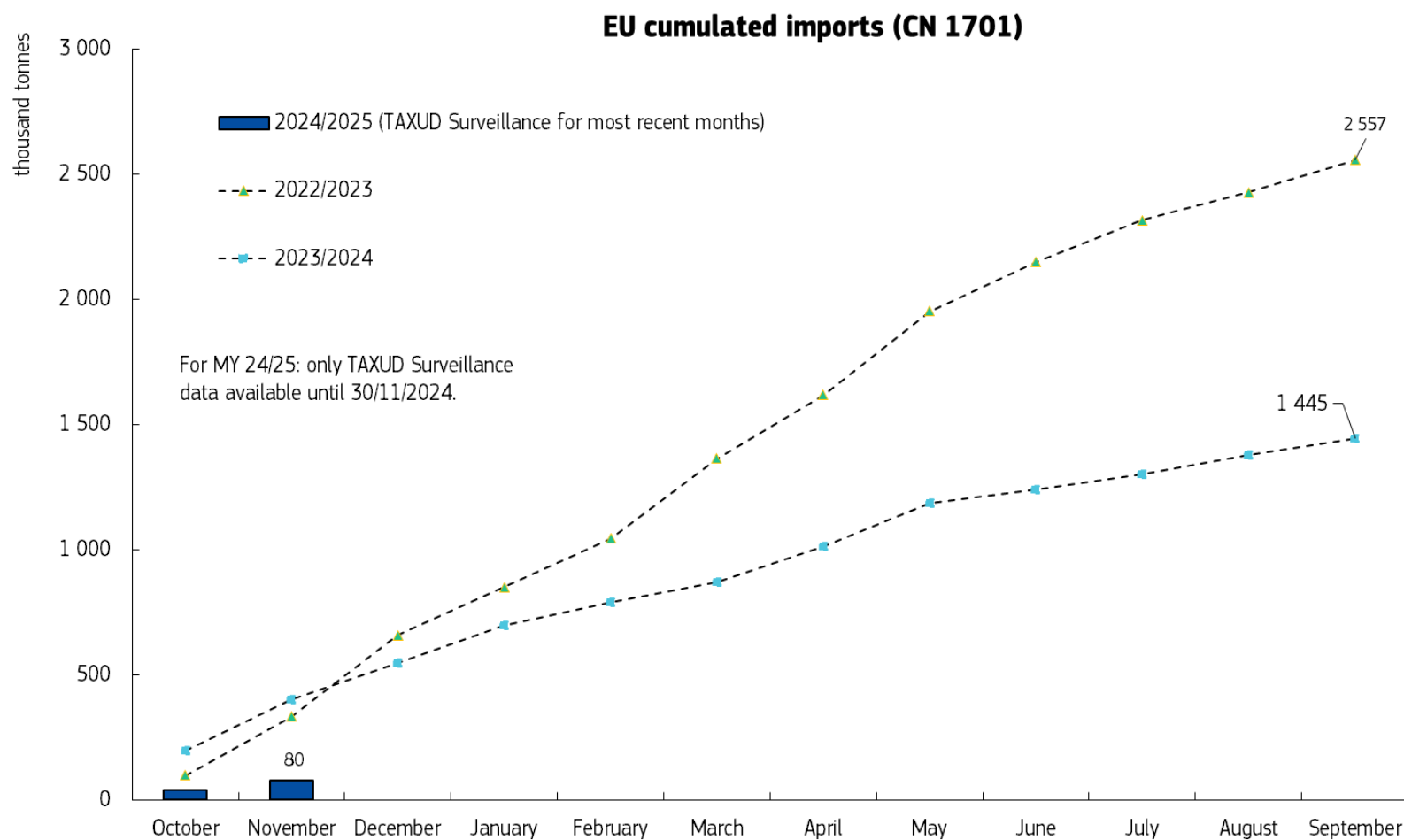


Sources: EUROSTAT - DG TAXUD



EU imports by main origins in Marketing Year 2024/25 (October and November) (TAXUD)

EU Total imports

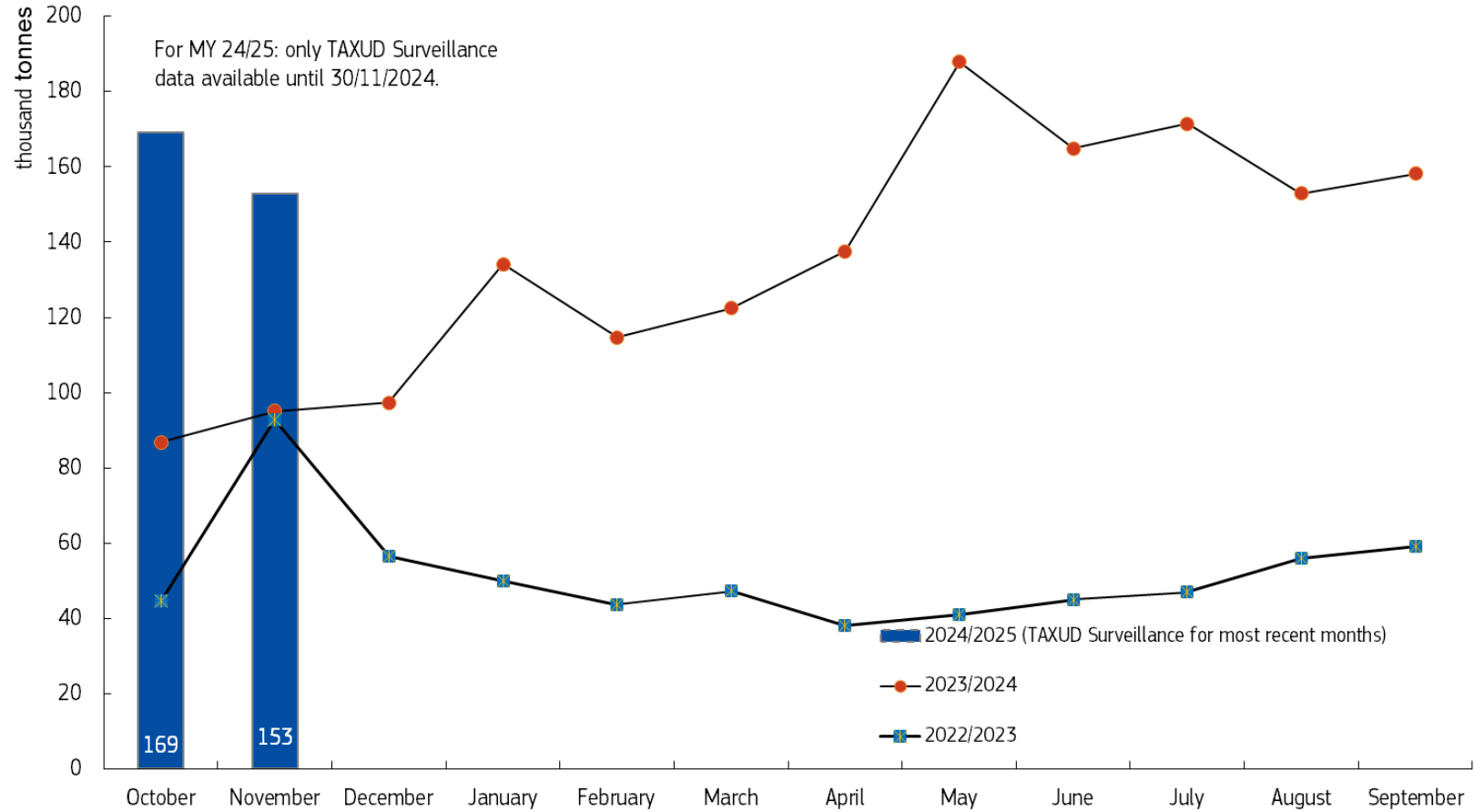


Source: EUROSTAT, Taxud

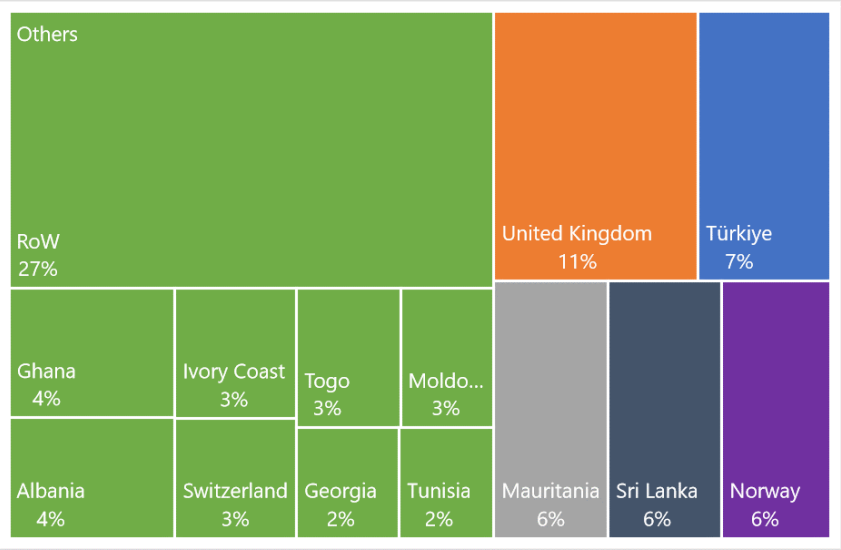
EU Sugar Exports

EU Total exports

EU Monthly sugar exports (CN 1701)



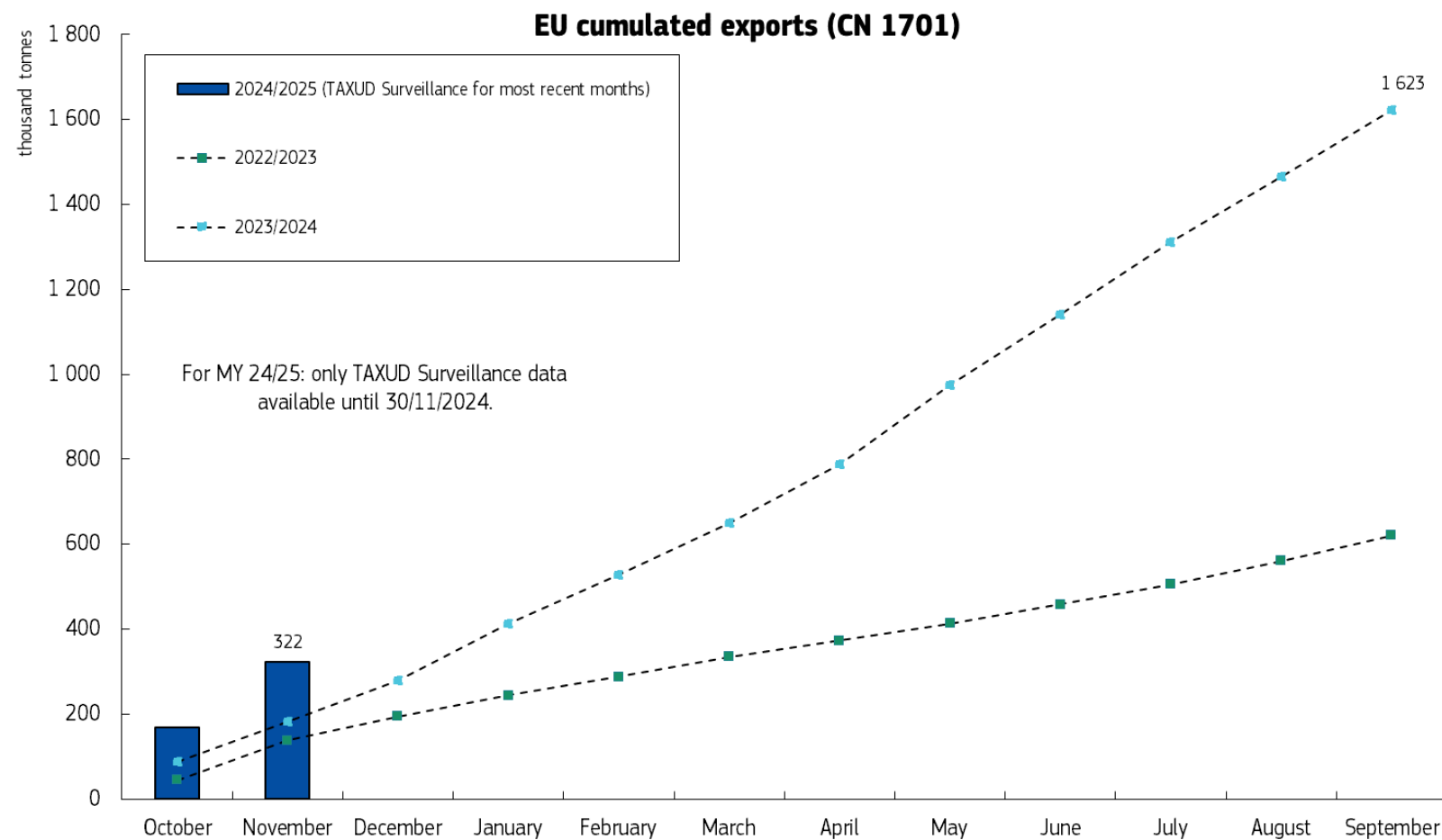
Source: EUROSTAT - DG TAXUD



EU exports by main origins in Marketing Year 2024/25 (October and November) (TAXUD)

RoW: rest of the world.

EU Total exports




Source: EUROSTAT- DG TAXUD

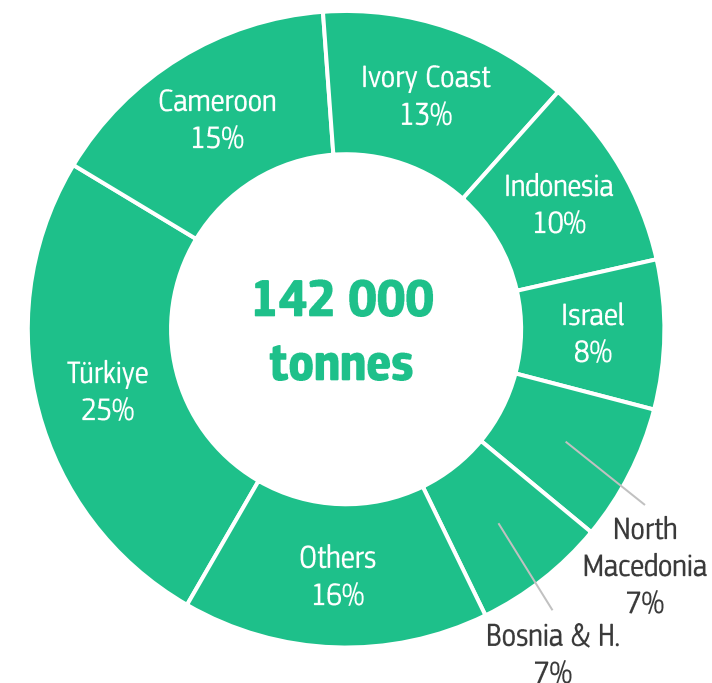
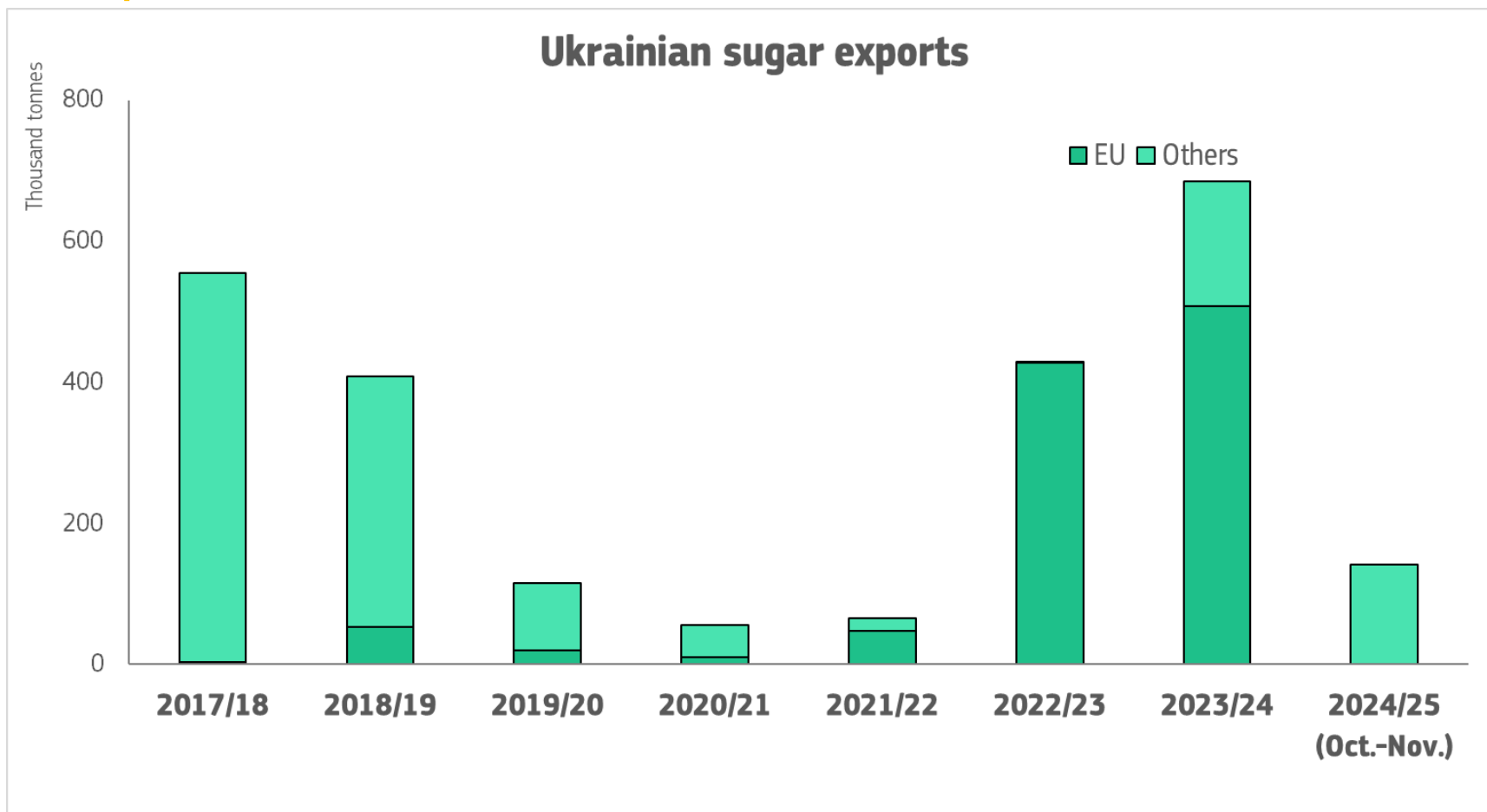
Focus on Ukraine

MY 2024/25

Update -sugar beet in 2024/25 in Ukraine

	2024/25 (until 28/11/2024)	2023/24
	253 400 ha	250 000 ha
	12.09 million tonnes	11.9 million tonnes

Ukrainian sugar exports (CN 1701)

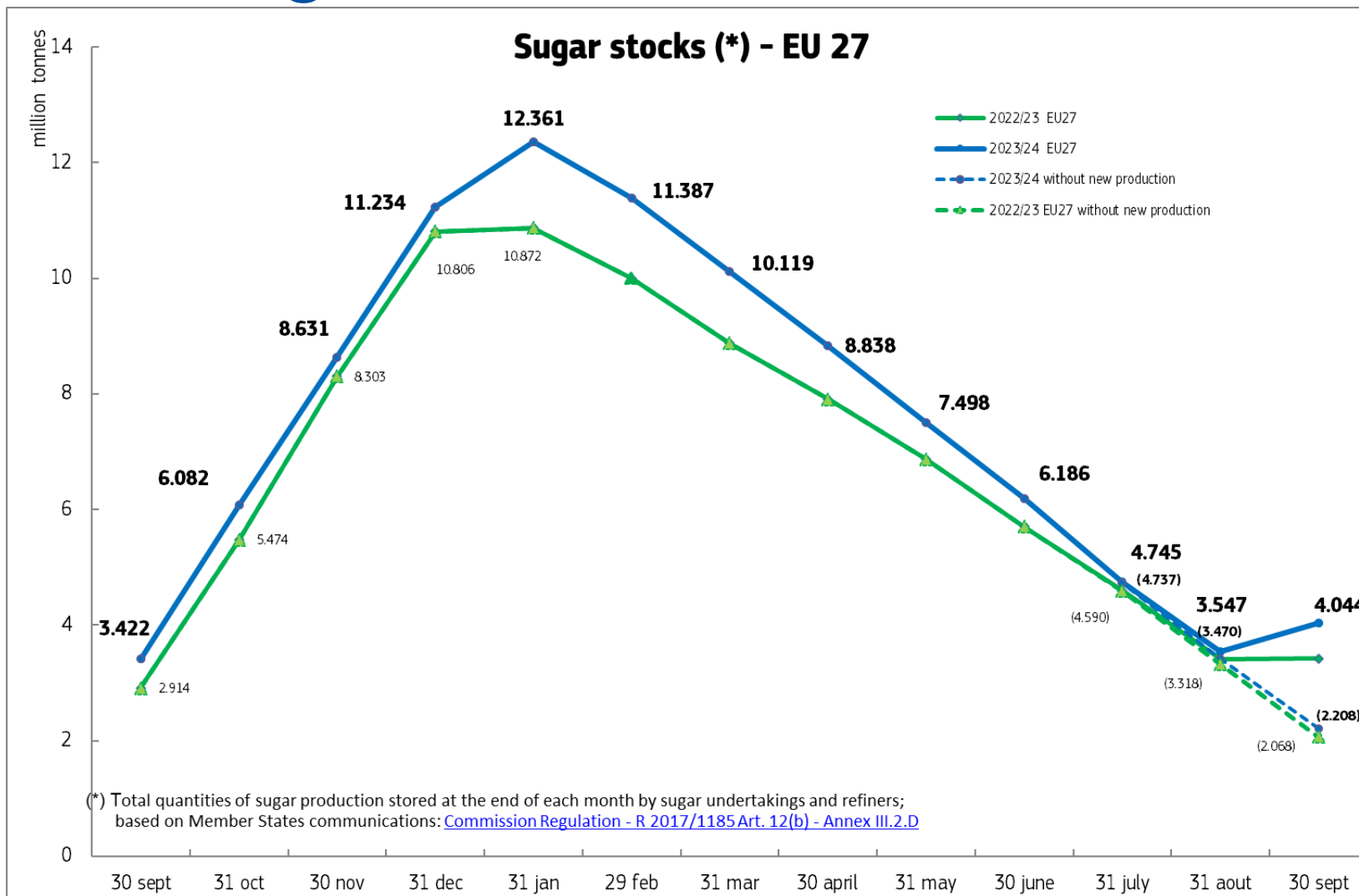


Top-destinations for
Ukrainian sugar exports
(Oct.-Nov. MY 2024/25)

EU Sugar stocks

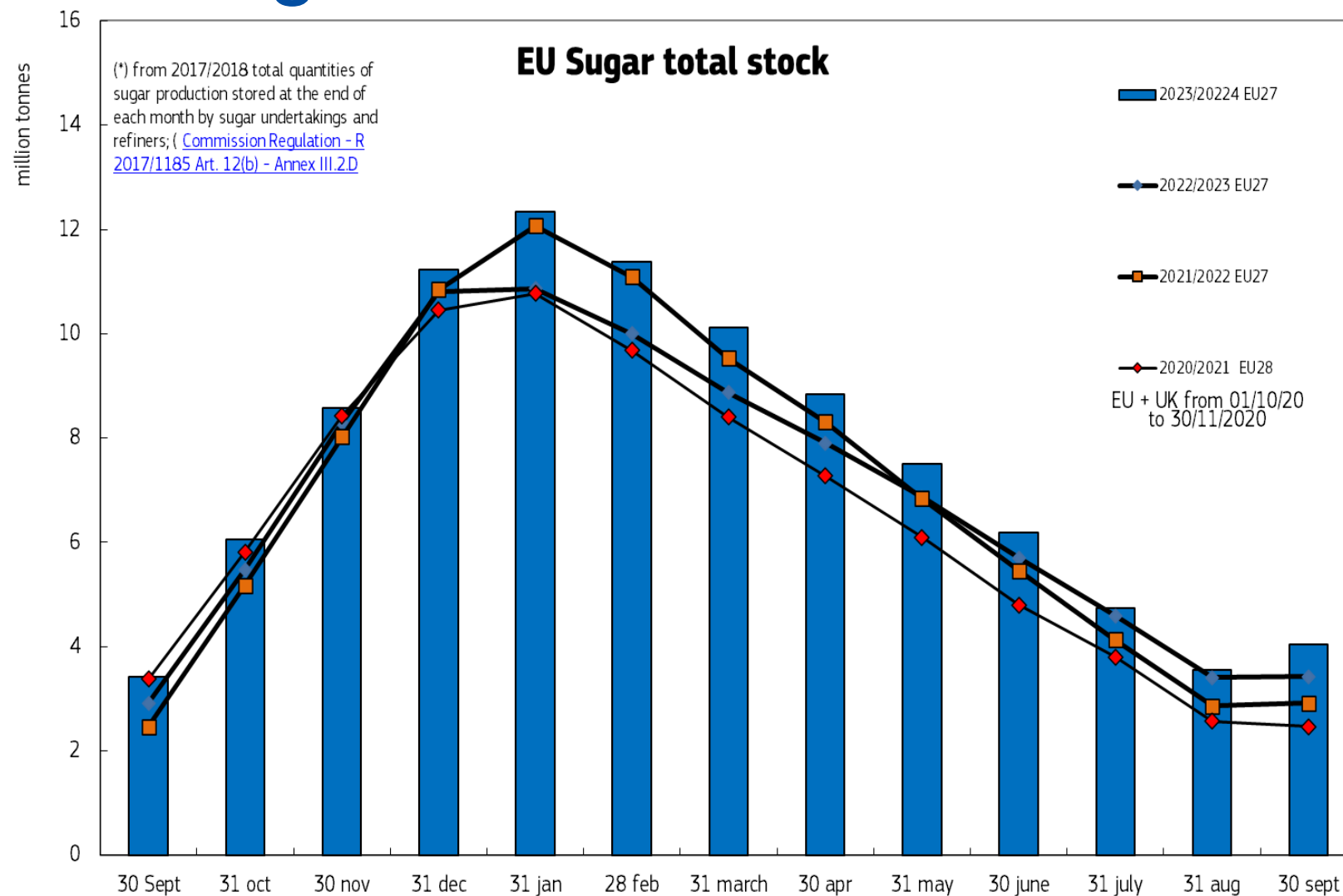
MY 2023-2024

EU Sugar stocks



Preliminary data for September 2024!

EU Sugar stocks

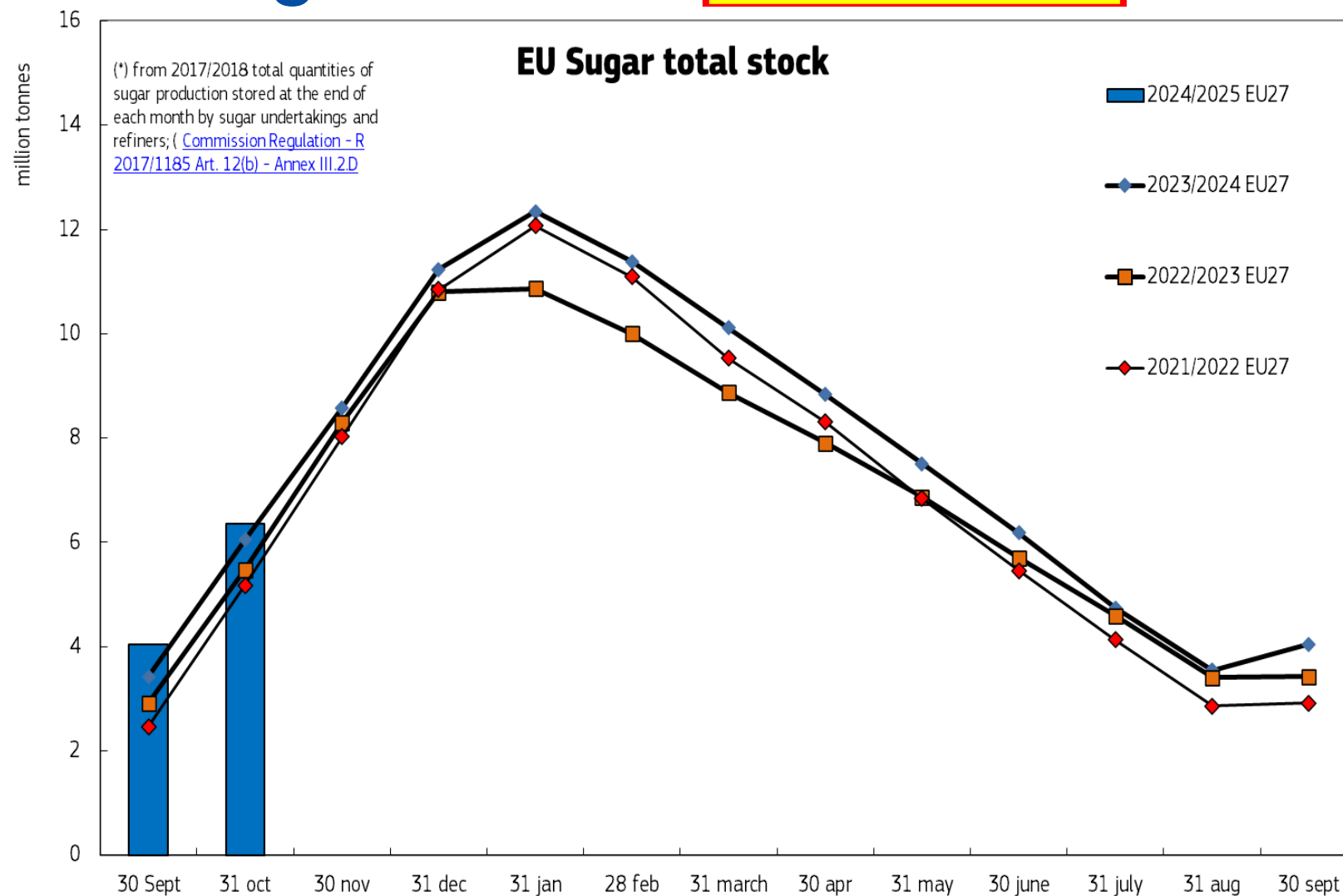


**Preliminary data for
September 2024!**

MY 2024-2025

EU Sugar stocks

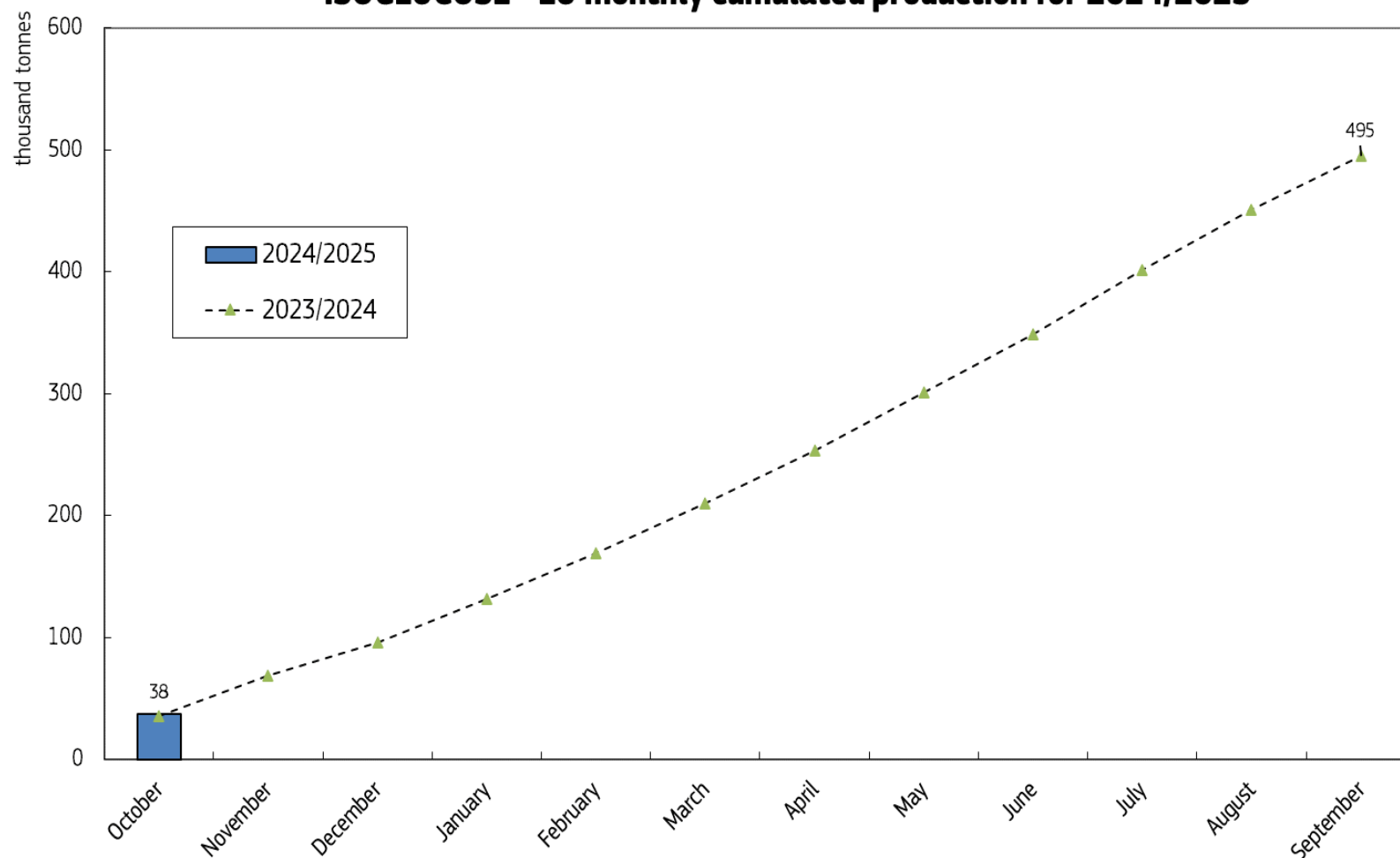
**Preliminary data for
September 2024!**



EU Isoglucose

EU Isoglucose production

ISOGLUCOSE - EU monthly cumulated production for 2024/2025



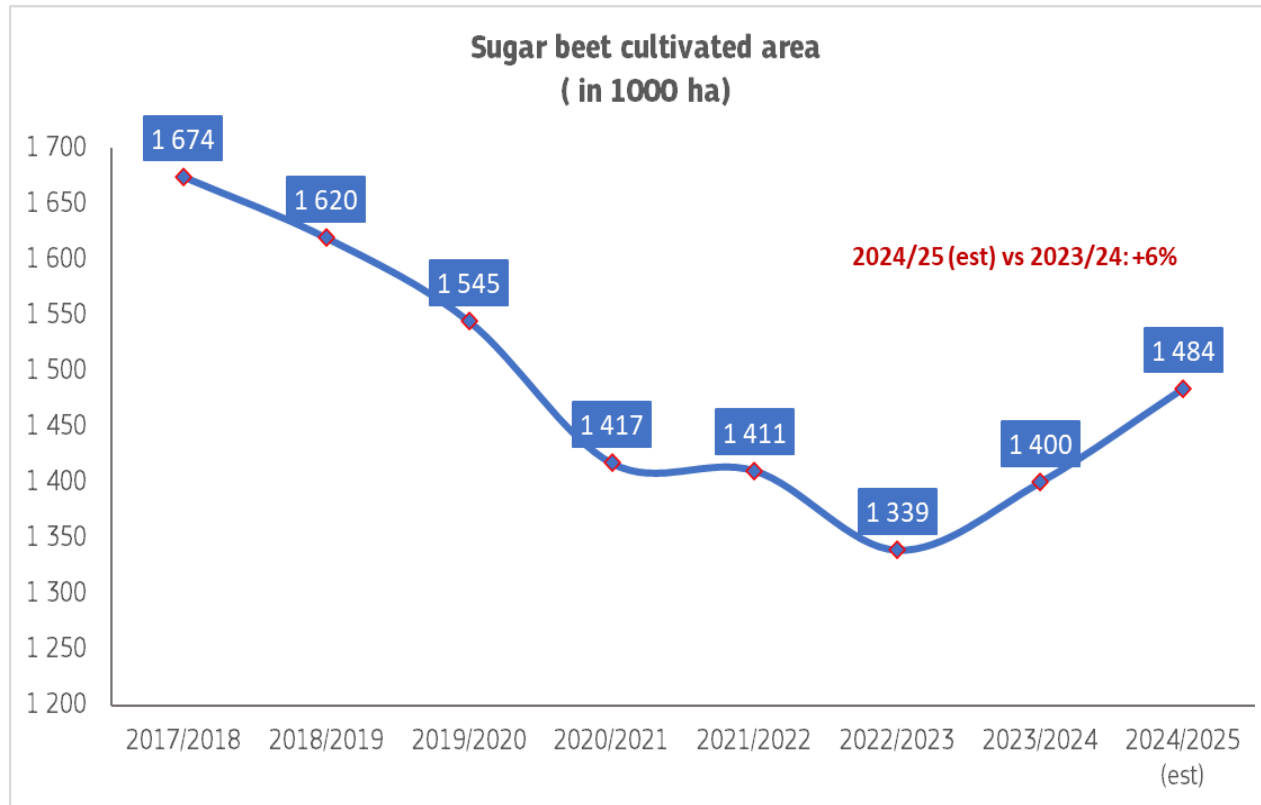
Source: DG AGRI.

Balance sheet

Update 2023/24 and 2024/25

Cultivated area

Final 2022/23, estimates MY 2023/2024 (update September 2024)



	Final Areas 000 ha 2023/24	Provisional Areas 000 ha 2024/25	Difference 2024/25 compared to 2023/24
BE	55.9	57.4	2.7%
CZ	60.1	63.6	5.8%
DK	31.1	33.0	6.2%
DE	375.3	379.0	1.0%
ES	35.7	43.2	21%
FR (Met.)	317.7	341.3	7.4%
FR (Dom.)			
HR	9.2	11.7	27%
IT	23.5	30.0	28%
LT	15.9	15.5	-2.5%
HU	12.9	15.3	19%
NL	83.5	86.5	3.5%
AT	36.2	44.5	23%
PL	265.7	274.2	3.2%
RO	15.6	22.9	47%
SK	21.7	23.2	7.3%
FI	11.5	14.4	25%
SE	28.8	28.6	-0.6%
TOTAL EU	1400	1484	6.0%

Sugar production

Estimates MY 2023/2024 (update September 2024)

Marketing year 2023/34 (Oct-Sep) (upd Sep 2024)	SUGAR			ISOGLUCOSE
	Areas (1000 ha)	Yield (t/ha)	Production (in tonnes wse)	Production (in tonnes wse)
Region 1	484	9.2	4 448 934	
<i>of which:</i>				
CZ	60	10.4	622 978	
PL	266	8.8	2 335 175	
Region 2	832	12.4	10 459 202	
<i>of which:</i>				
DE	375	11.5	4 302 313	
FR (Met.)	318	13.3	4 224 893	
FR (Dom.)			147 863	
Region 3	84	8.21	689 388	
TOTAL	1 400	11.2	15 624 361	490 000
Sugar production- estimates communicated by MS in March (or latest complete estimates available)				
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)				

Reminder:

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

Region 2: BE - DE - FR – NL

Region 3: ES - HR - IT - RO

Sugar production

Initial estimates MY 2024/2025 (update September 2024)

Estimates calculated by DG Agri

Marketing year 2024/25 (Oct-Sep) (upd Sep 2024)	SUGAR			ISOGLUCOSE
	Areas (1000 ha)	Yield (t/ha)	Production (in tonnes wse)	Production (in tonnes wse)
BE	57.4	9.9	570 696	
CZ	63.6	10.1	644 206	
DK	33.0	12.3	407 070	
DE	379.0	12.1	4 581 963	
ES	43.2	11.3	488 583	
FR (Met.)	341.3	12.7	4 345 789	
FR (Dom.)			147 863	
HR	11.7	7.8	91 234	
IT	30.0	7.5	223 716	
LT	15.5	10.1	157 222	
HU	15.3	7.2	110 273	
NL	86.5	13.0	1 124 500	
AT	44.5	11.2	496 649	
PL	274.2	9.1	2 500 814	
RO	22.9	5.7	130 605	
SK	23.2	7.9	183 227	
FI	14.4	5.6	80 904	
SE	28.6	10.5	300 604	
TOTAL	1 484	11.1	16 585 916	506 000

Sugar production- estimates calculated by the DG Agri (or latest estimates available)

Estimates for production for MY 2024/2025 at MS level calculated by DG Agri (or latest estimates available), using data on cultivated area for sugar production, JRC Mars forecast for sugar beet yields (or five-year Olympic average sugar beet yields) and an average sugar content and information provided by Member States and the press.

Sugar balance sheet

Estimates MY 2023/2024 and initial estimates for MY 2024/25
(update September 2024)

(in 1 000 tonnes wse)	2020/21 (Oct-Sep)		2021/22 (Oct-Sep)		2022/23 (Oct-Sep)		Estimates 2023/24 (Oct-Sep)		Estimates 2024/25 (Oct-Sep)	
Latest update Sep 2024	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose
Beginning stocks	2 160	13	1 225	13	1 519	15	2 068	19	1 726	26
Production	14 546	620	16 618	577	14 603	433	15 598	490	16 586	506
Imports	2 075	4	2 168	3	3 284	4	2 240	3	2 050	3
as such	1 313		1 384		2 514		1 440		1 250	
in processed products	762		784		770		800		800	
Total availabilities	18 780	637	20 010	593	19 406	452	19 906	512	20 362	535
Consumption/disappearance	14 145	536	15 051	505	14 150	384	14 180	442	14 180	464
of which industrial use	480		1 070		1 095		1 080		1 080	
of which bioethanol	726		840		713		800		800	
other	12 940		13 141		12 342		12 300		12 300	
Exports	3 410	88	3 440	73	3 188	49	4 000	44	4 250	45
as such	860		800		620		1 550		1 800	
in processed products	2 550		2 640		2 568		2 450		2 450	
Ending stocks	1 225	13	1 519	15	2 068	19	1 726	26	1 932	26
Total outlets	18 780	637	20 010	593	19 406	452	19 906	512	20 362	535

Downward revisions were applied to imports of sugar as such in 2021/22 and 2022/23, which were reflected in a decrease in consumption/disappearance "other" (after some adjustments also in the exports of sugar in processed products). The revision of imports was due to a change in the trade regime (from Normal to Inward processing).

2021/22: from 1.5 to 1.38 mln tonnes wse*
2022/23: from 2.58 to 2.51 mln tonnes wse*

*wse - white sugar equivalent.

Sugar production: estimates for MY 23/24 provided by Member States in March 2024 (or latest estimate available used). For MY 2024/25 sugar production calculated by DG Agri (or latest estimate available used).

Disappearance: industrial use data brought in line with sugar use (non-food industry); bioethanol brought in line with bioethanol production; other remains a balancing figure until MY 2022/23.

Thank you