

10.9.2024

# Overview of the European sugar beet crop 2024/25



Sugar Market Observatory– 12 September 2024



# Key features of the 2024 beet crop

- another spring and summer with difficult and complicated weather conditions for many European sugar beet growers. Not enough or too much rain or too much heat
- beet sowing had been delayed by around 2 weeks in many regions
- In large parts of southern-central and south-eastern Europe, June, July and August were exceptionally hot, with several days seeing maximum temperatures above 35°C, which negatively affected summer crops
- water excess persisted in large parts of the Netherlands, western and southern Germany, north and central France, and northern Italy





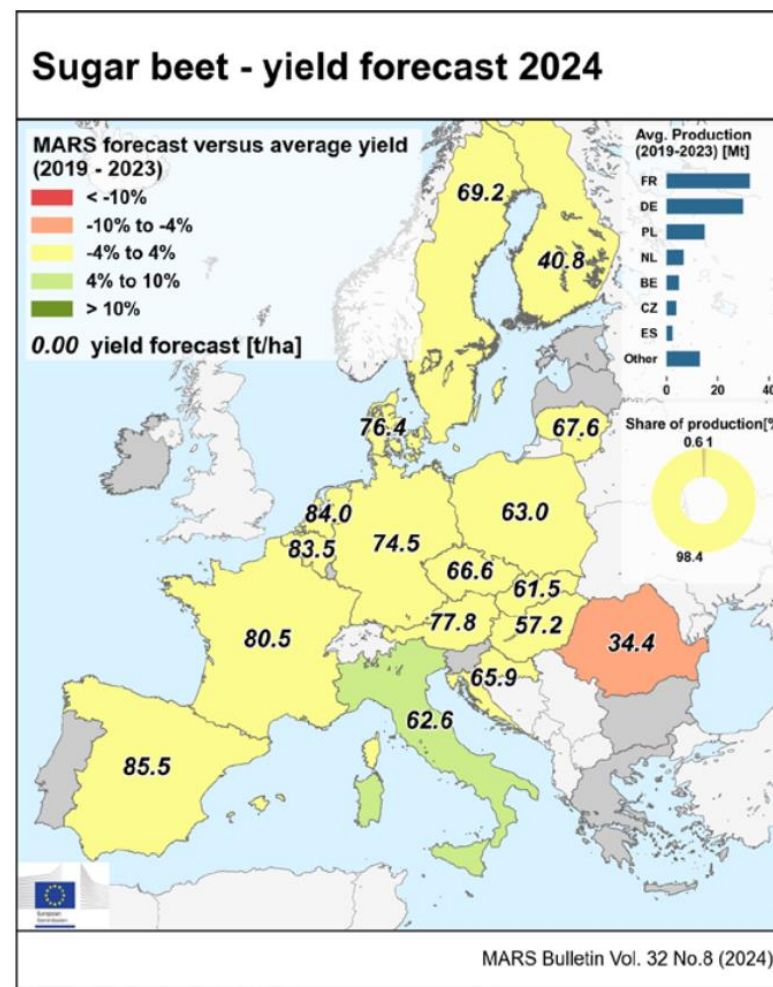
# Key features of the 2024 beet crop

- 🌿 SBR (Syndrome de basse richesse - Low sugar content syndrome) and RTD (rubbery taproot syndrome) remains present, especially in South Germany, making estimate difficult (see last year)
- 🌿 virus yellows also remains present in some regions in France
- 🌿 the presence of foliar diseases, especially mildew and cercospora, on beet is significant in many regions
- 🌿 in these regions, it remains to be seen if better climatic conditions in August and September would allow some recovery and increase in sugar content
- 🌿 better conditions in PL and UK
- 🌿 it looks like a “mixed bag”



# Forecasts 2024/25: caution needed

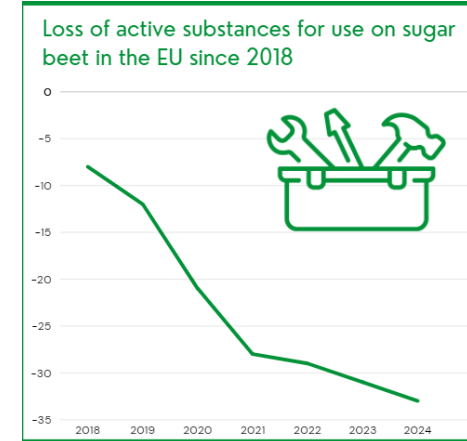
- Increased acreage in the EU (around 7%) could be balanced with possible downside yield
  - According to JRC MARS bulletin dated August, beet yield would be in line with the EU 5-Year average
  - However, these forecasts have raised some concerns among CIBE members. For example, in the Netherlands it seemed clear as from June that the average beet yield would not reach the 84 t/ha indicated. In France, there are also doubts that average beet yield would reach the 80t/ha indicated in August. On the other hand, in Poland, due to good conditions in spring and summer, expectations would be above the forecast indicated in this publication
  - Beet harvest & processing started in IT, PL, SK, RO, DE & more recently in SE, FR & CZ, other countries will follow in coming days/weeks
- CIBE's very first estimate is expected by end of September





# Beet crop forecasts: caution needed in the light of the depleting crop protection toolbox

- Over 30 Active Substances (AS) to protect beet “lost” since 2018
  - Still no real effective alternatives to compensate such loss, despite R&D projects (first results of alternative tools/combined strategies are disappointing)
  - Difficulties to protect the crop up to harvest
  - This leads to difficulties and big uncertainties regarding early estimate of beet and sugar yield
- Over 40 AS are coming up for renewal by the end of 2026 (around half would not be further approved)
  - As from 2026 only a handful of herbicide, insecticide and fungicide ASs will be available (incl. very few new AS coming on stream)
  - These difficulties in early harvest estimate will exacerbate
- It leads to competitiveness issues with competitors in third countries
- In addition, the development of “compensation schemes” (via risk management tools or via sugar companies own schemes) are more and more necessary to avoid risk of abandonment of beet cultivation in the short-term



# Growers' concerns... ahead of the 2025/26 season



- Many R&D projects on crop protection running in EU sugar beet countries
- Hope lies mainly in innovation in breeding, but this takes time (+EU NGTs dossier is stuck in limbo)
- Progress in yield seems over in the short-term
- Grain harvests 2024/25 are disappointing in many EU regions (catastrophic in FR)
- EU average sugar yield per hectare 2024/25 not expected to be higher than 2023/24
- Costs of production/inputs 2024/25 remain high, combined with EU sugar prices decrease → risk of price-costs squeeze with negative consequences on growers' income
- Competitiveness of EU beet is challenged
- Measures are needed (compensation schemes, mirror measures) to avoid risk of withdrawal /abandon of beet cultivation but allow beet area to adjust to markets

# Thank you for your attention!



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