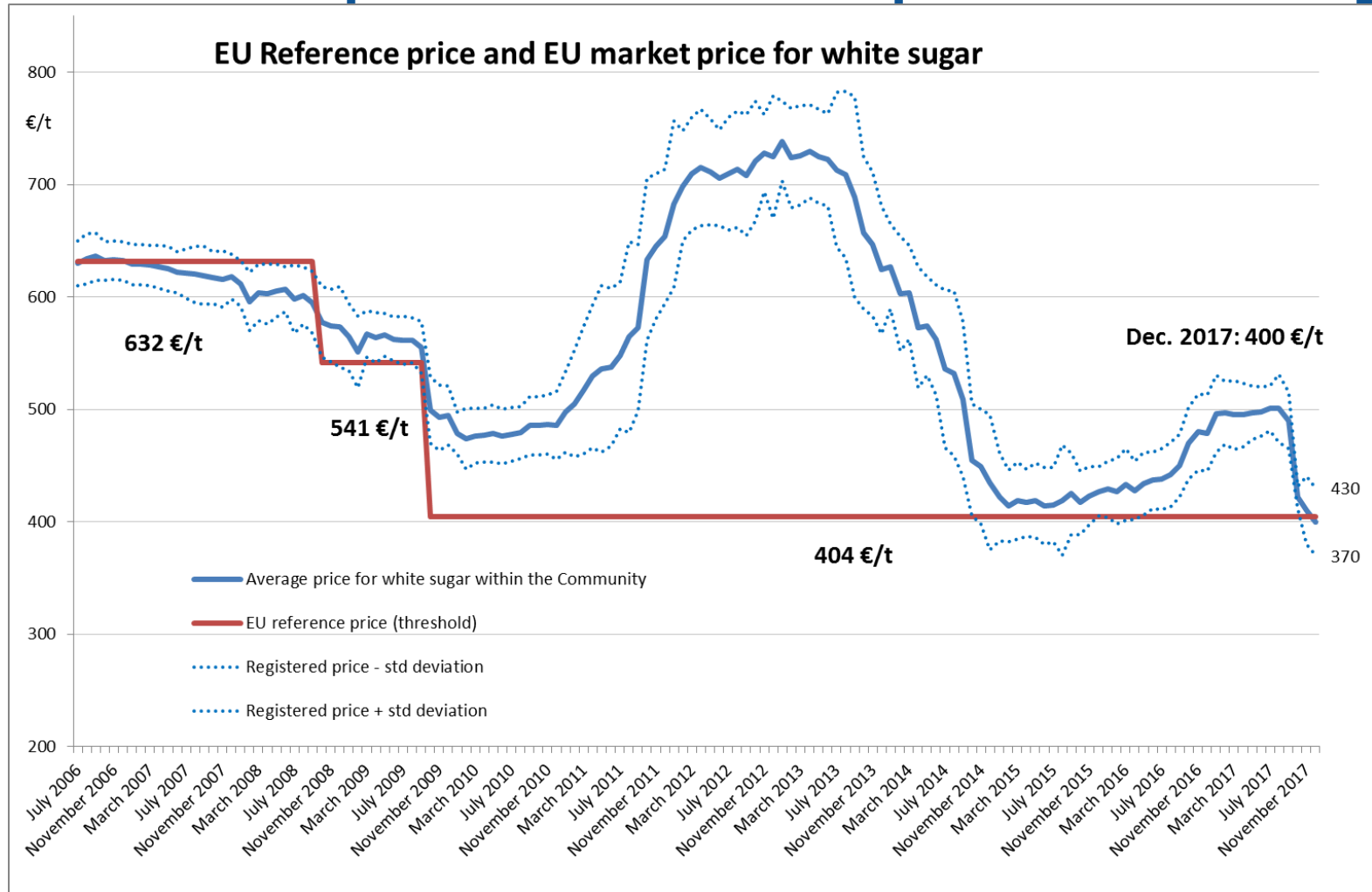


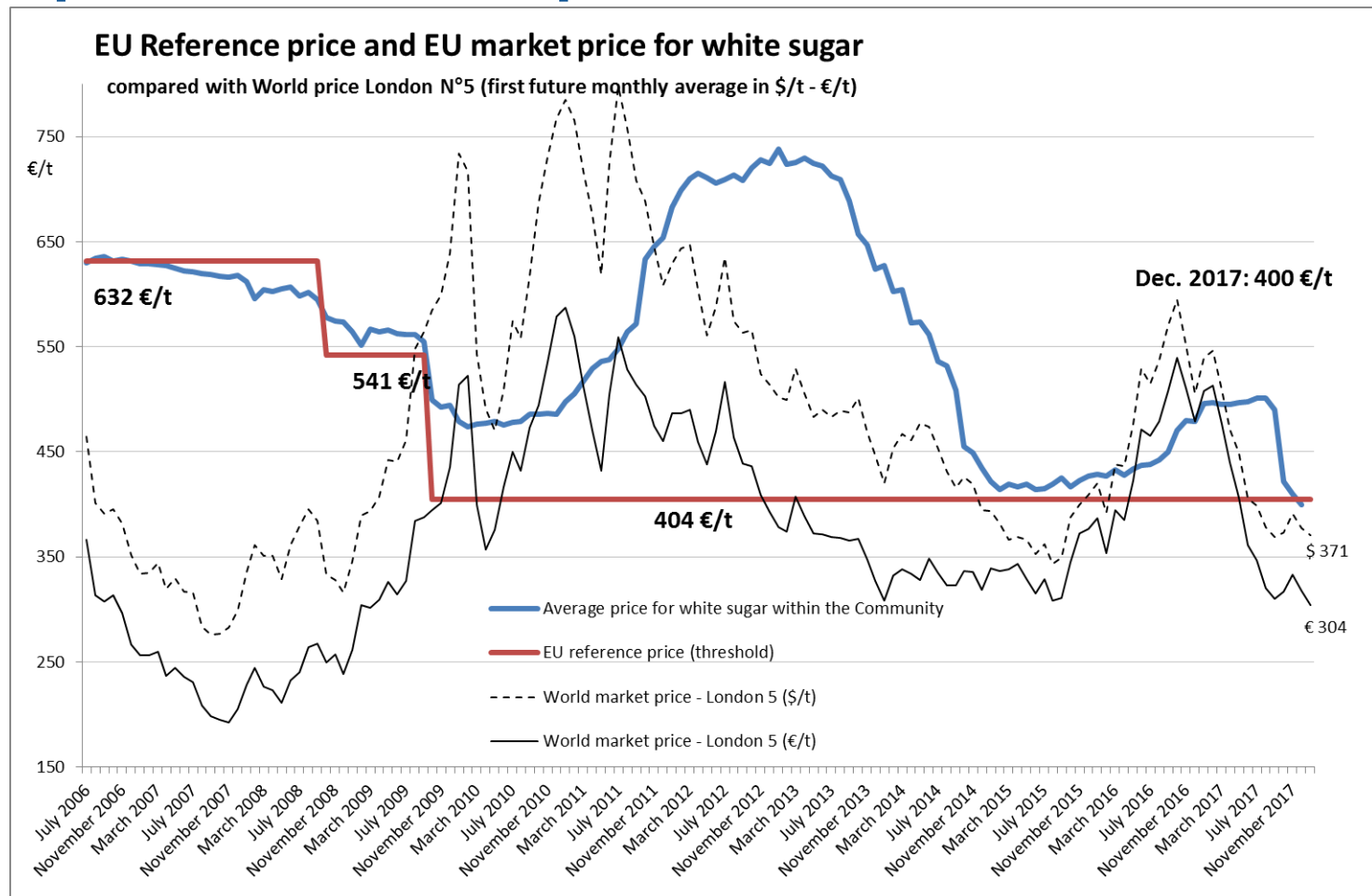
Sugar Price reporting

AGRI G 4
Civil Dialogue Group - Arable Crops
Sugar sector
16 March 2018

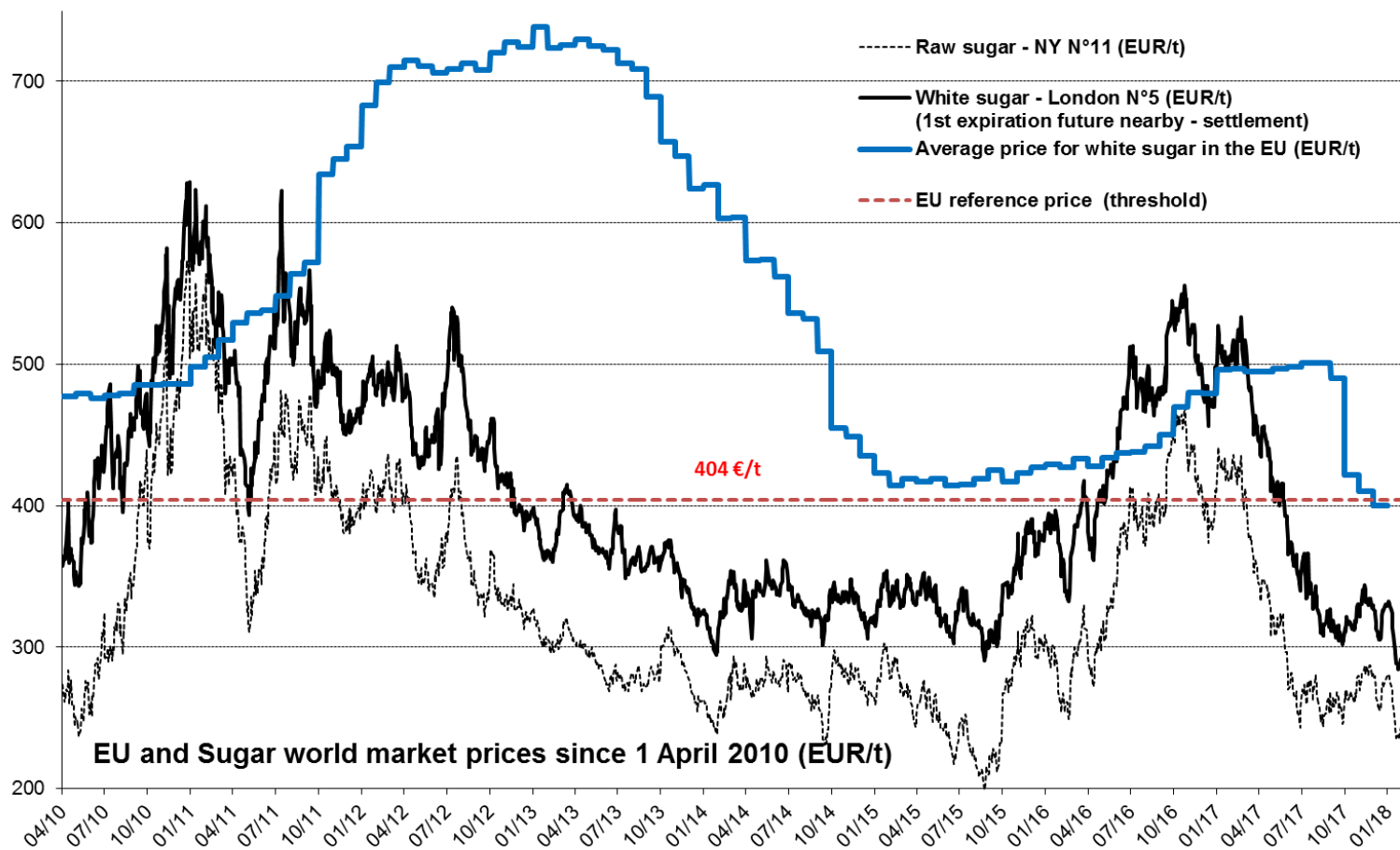
EU Reference price and EU market price for white sugar



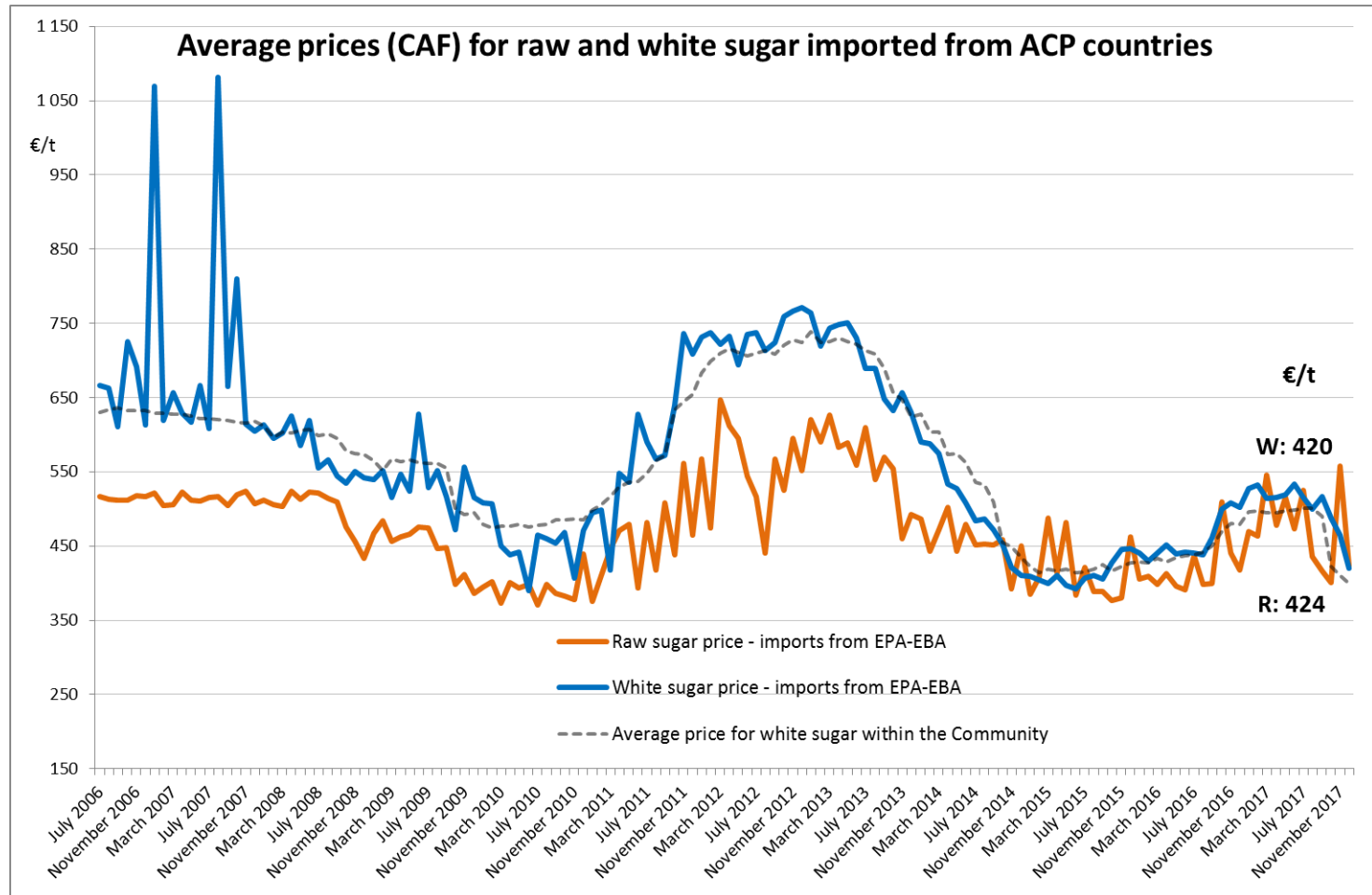
EU Reference price and EU market price for white sugar compared with World price London N°5 (first future - \$/t - €/t)



EU market price and world market prices London 5 and NY 11 - first future - €/t



ACP average import price

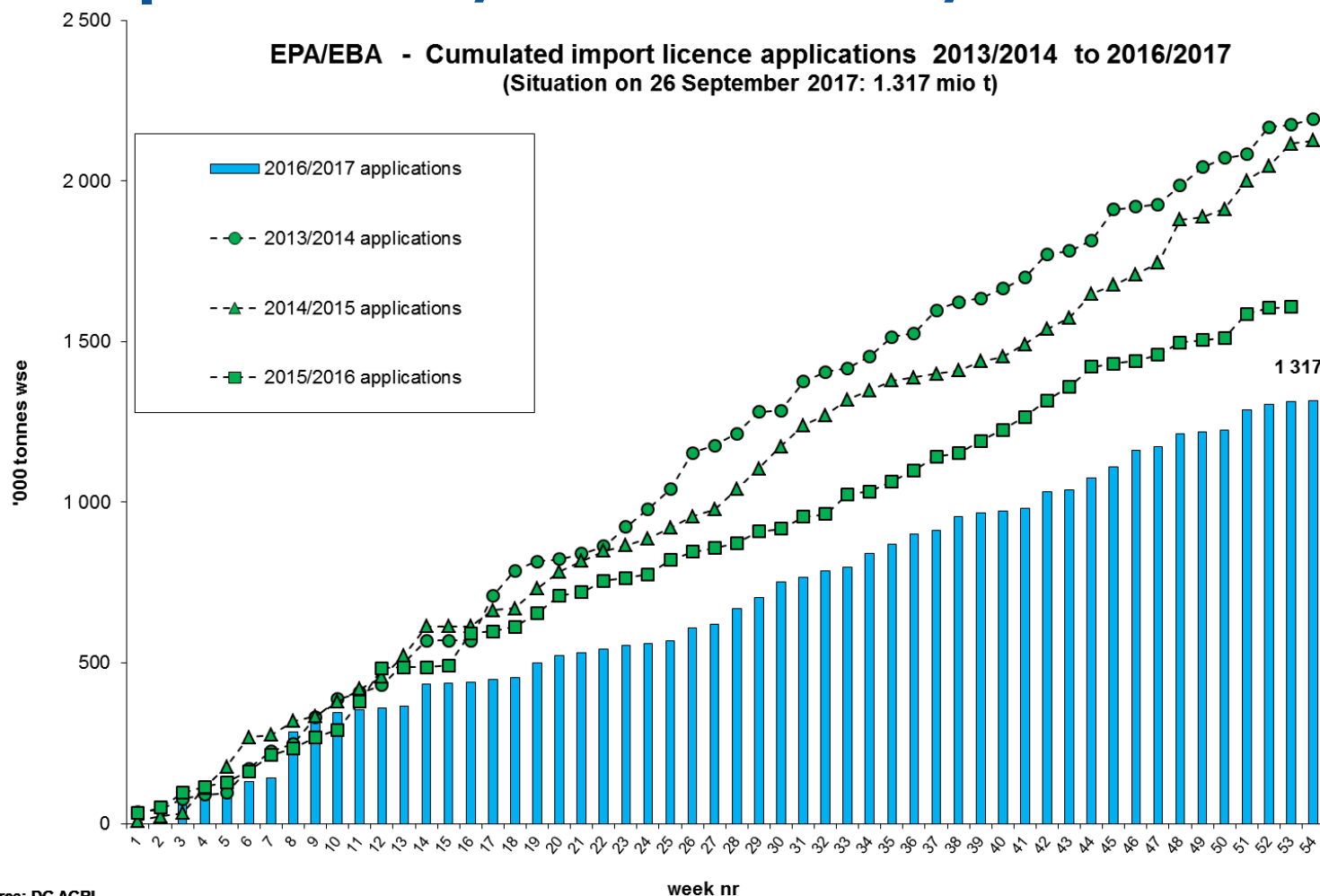


Sugar Trade statistics

AGRI G 4
Civil Dialogue Group - Arable Crops
Sugar sector
16 March 2018

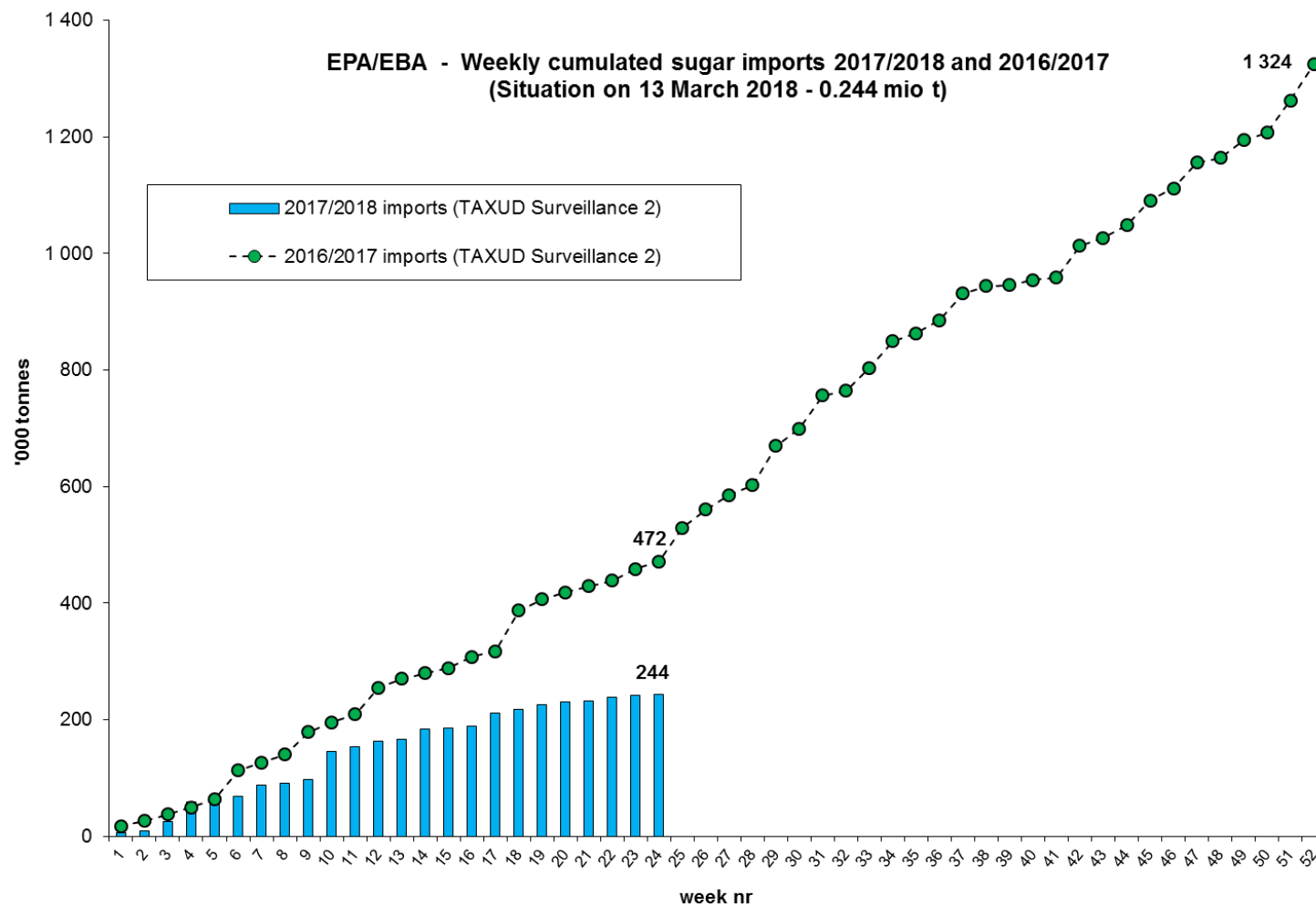
EU Sugar Preferential Imports

1. Imports EPA / EBA in 2016/2017



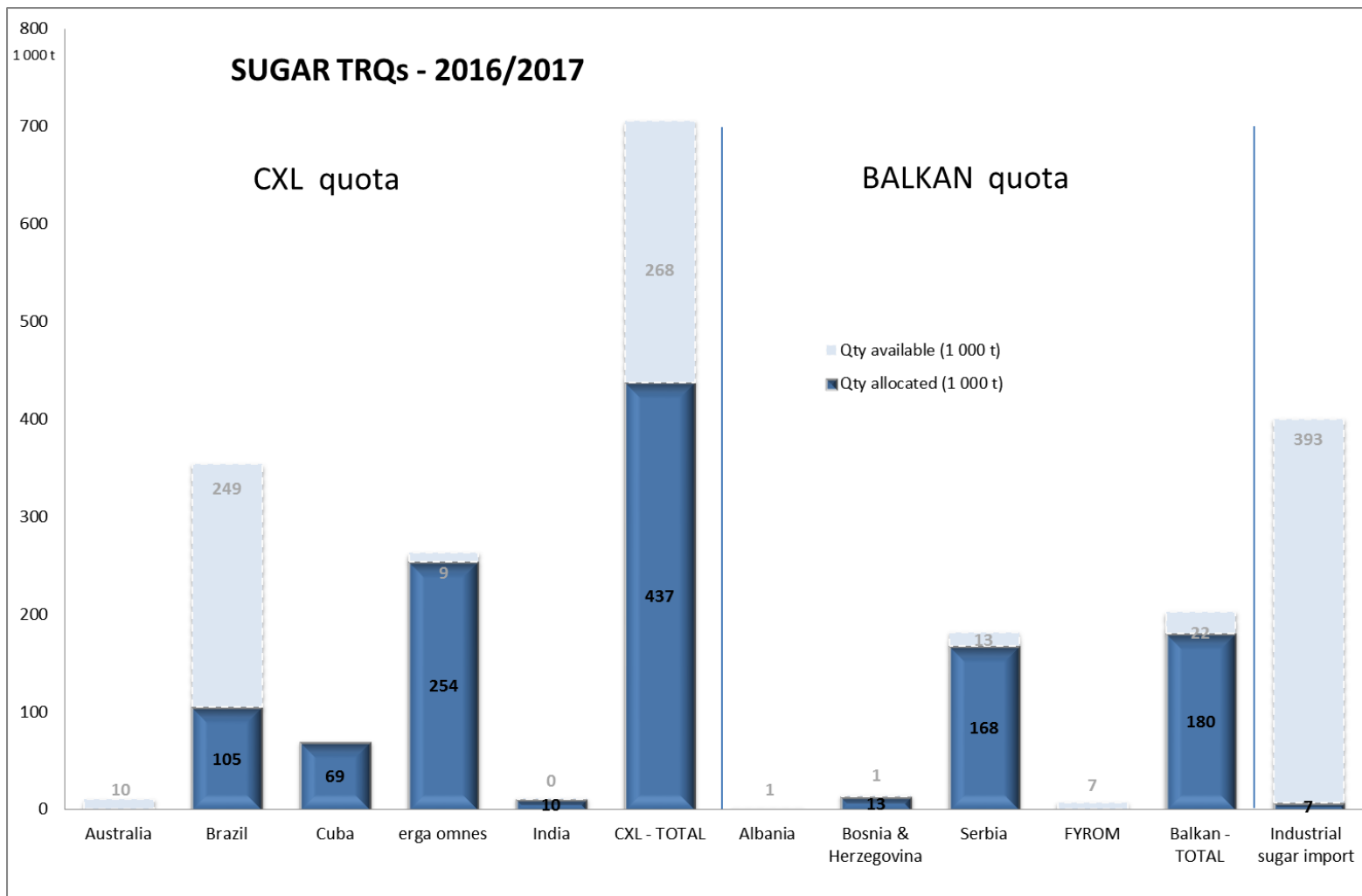
Source: DG AGRI

1. Imports EPA / EBA in 2017/2018

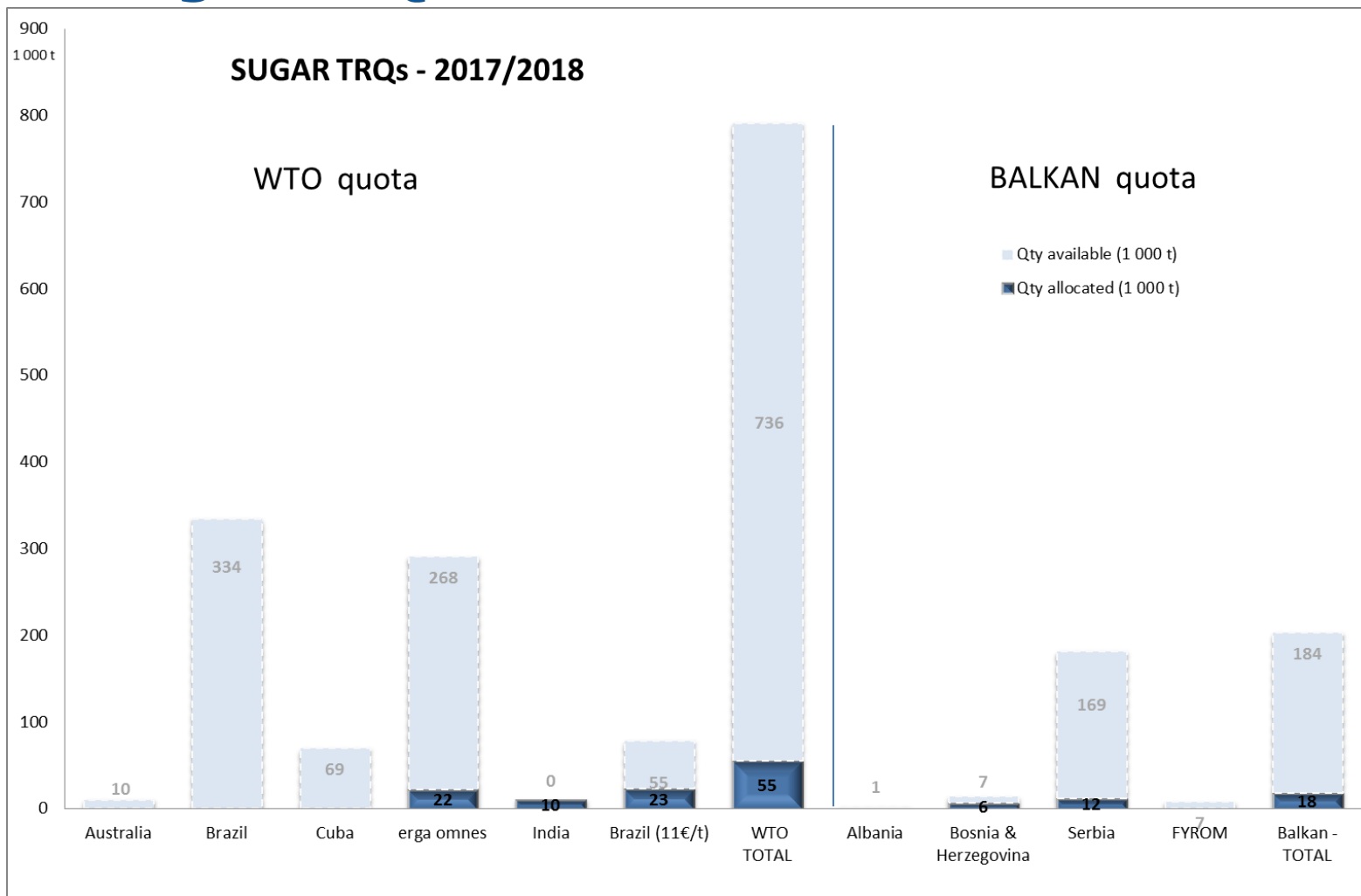


Source: DG TAXUD - DG AGRI

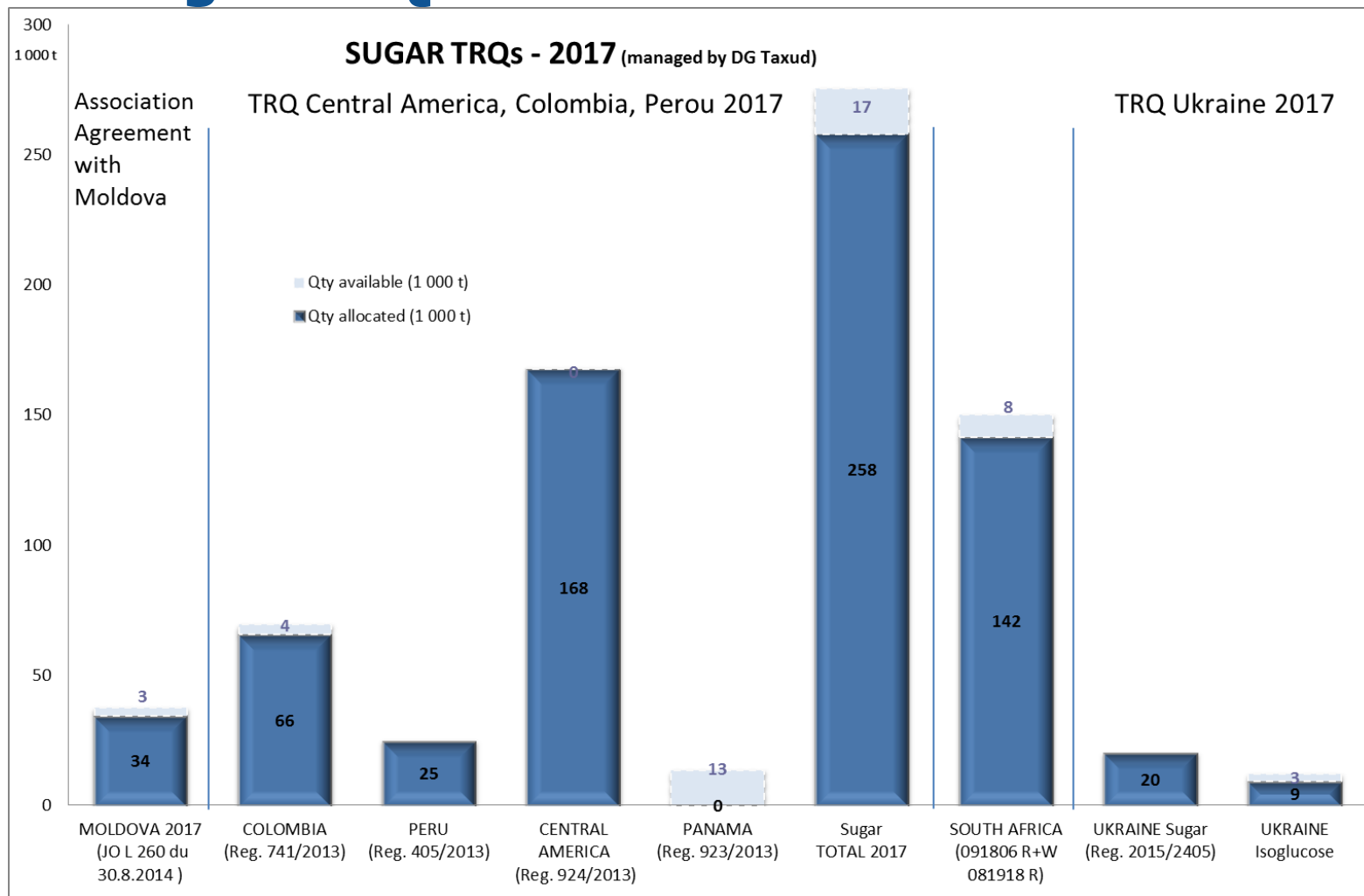
2. Sugar TRQs 2016-2017



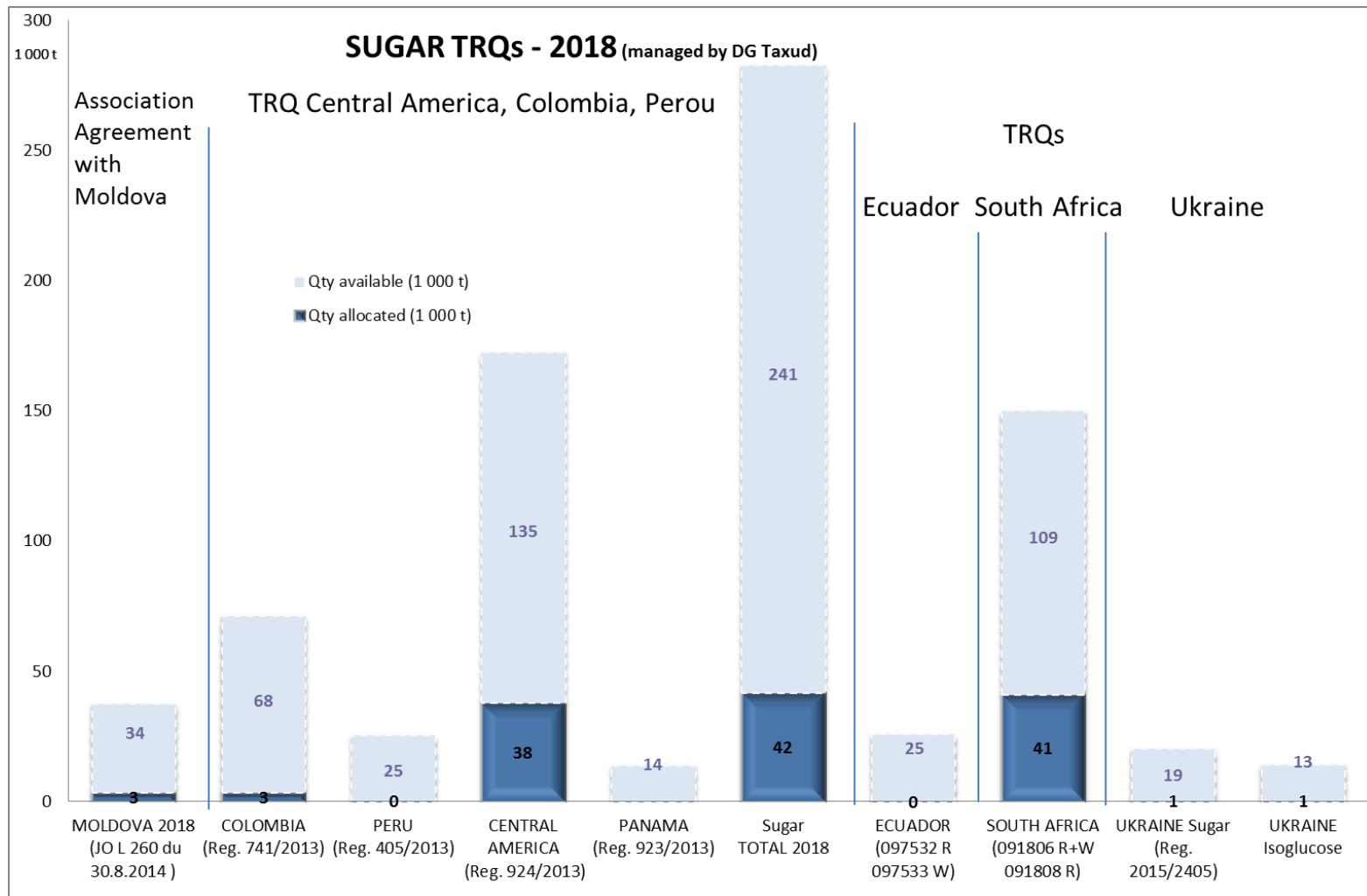
2. Sugar TRQs 2017-2018



2. Sugar TRQs 2017

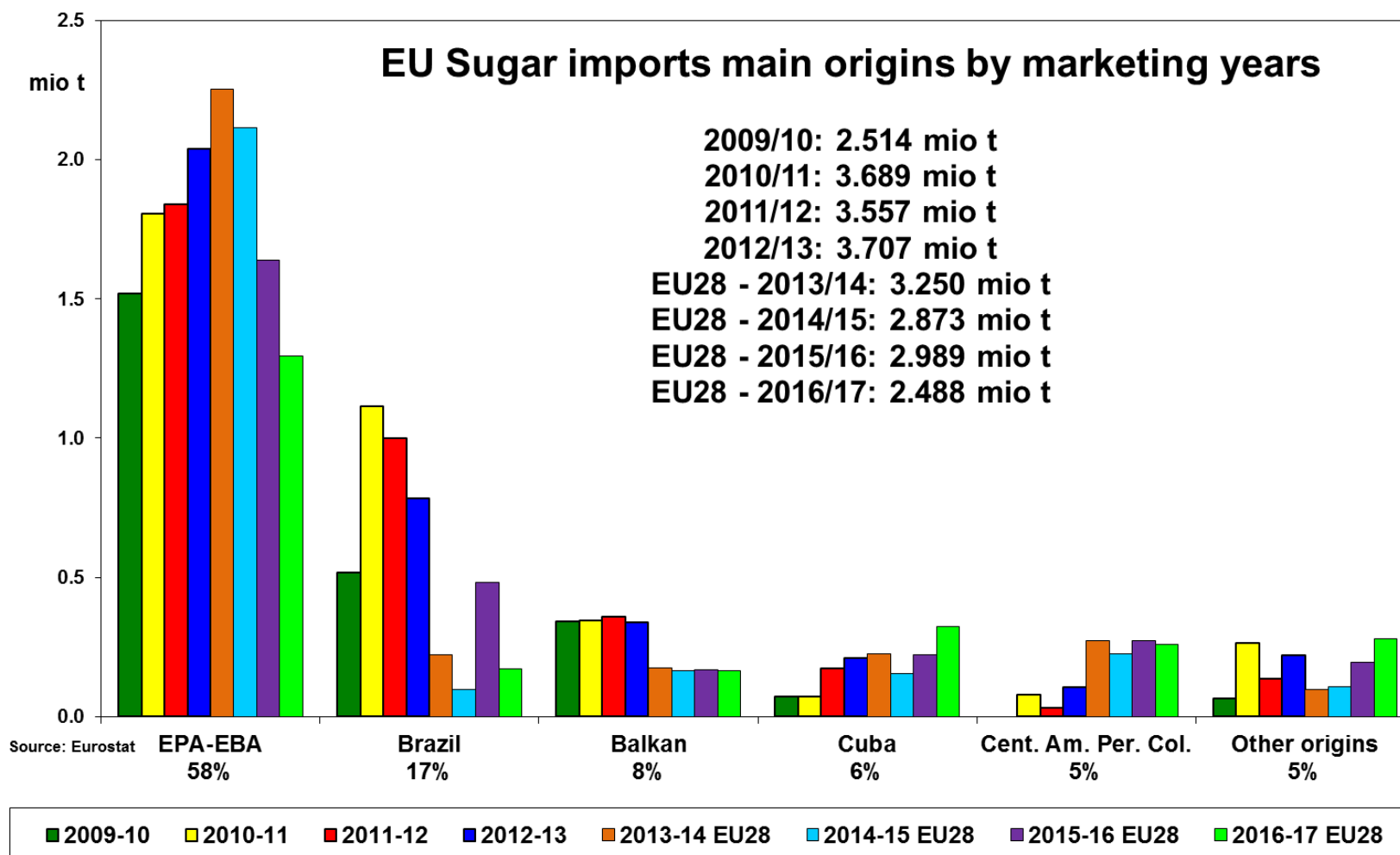


2. Sugar TRQs 2018

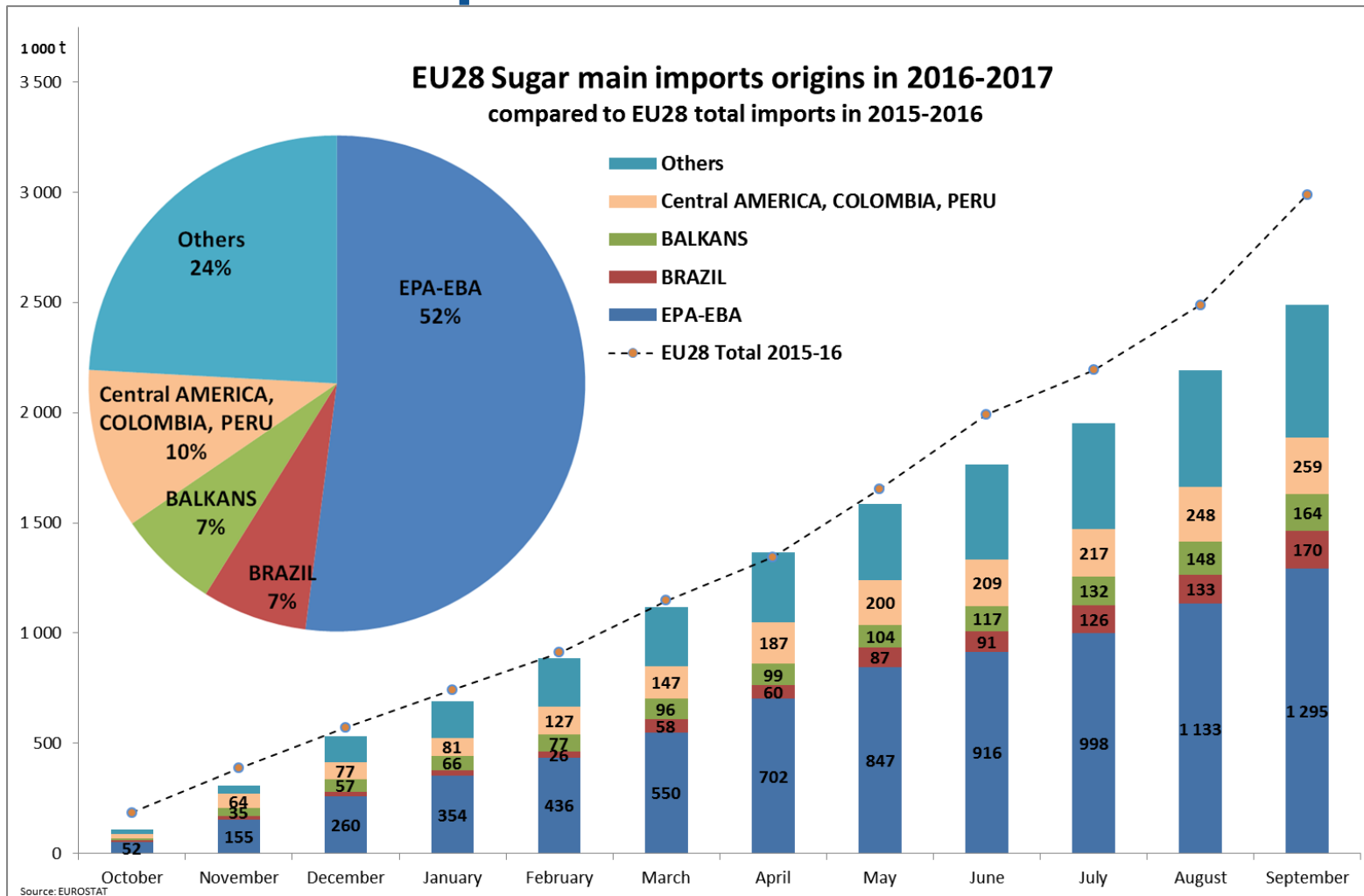


EU Sugar Imports

3. EU Total imports

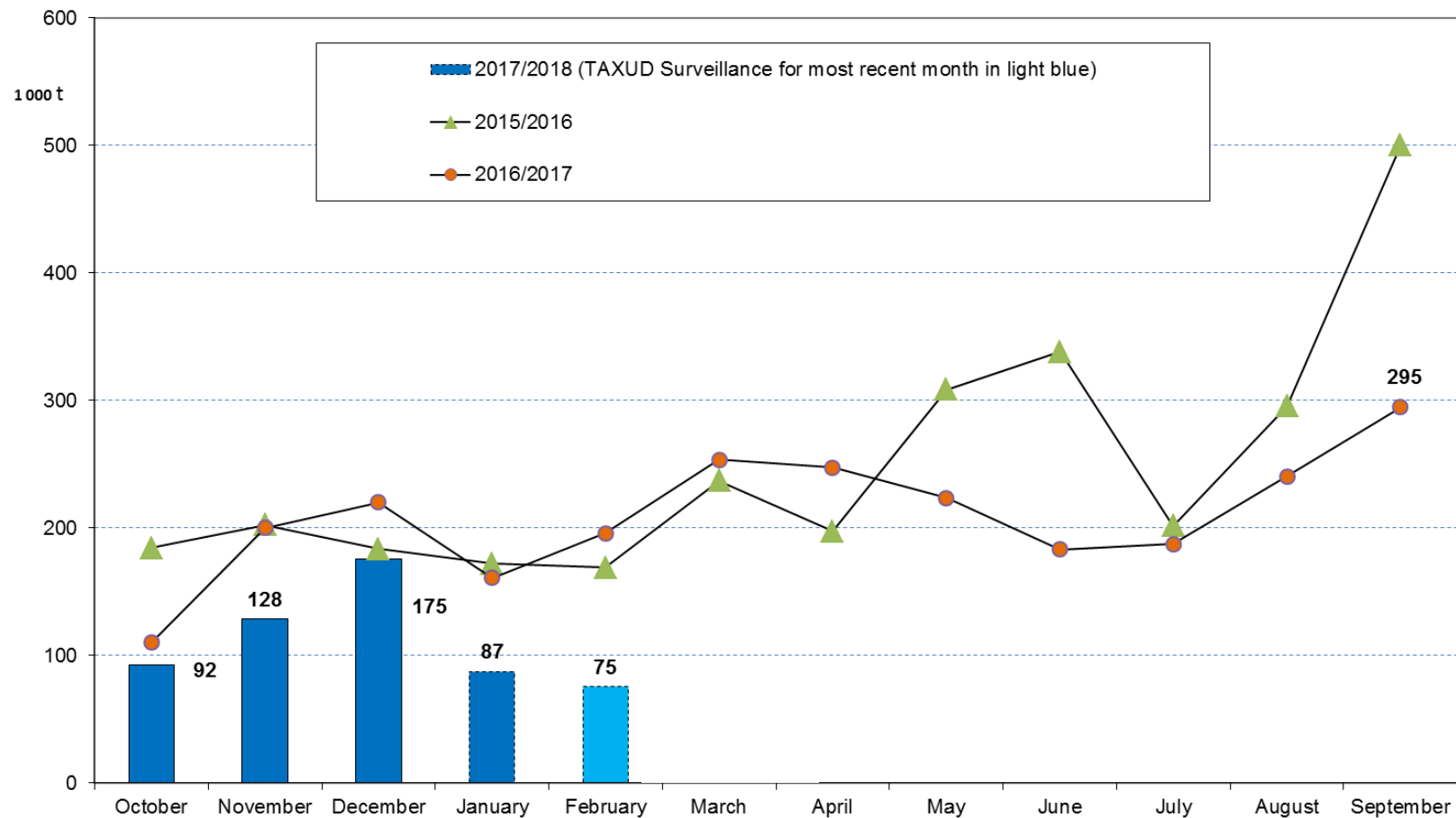


3. EU Total imports



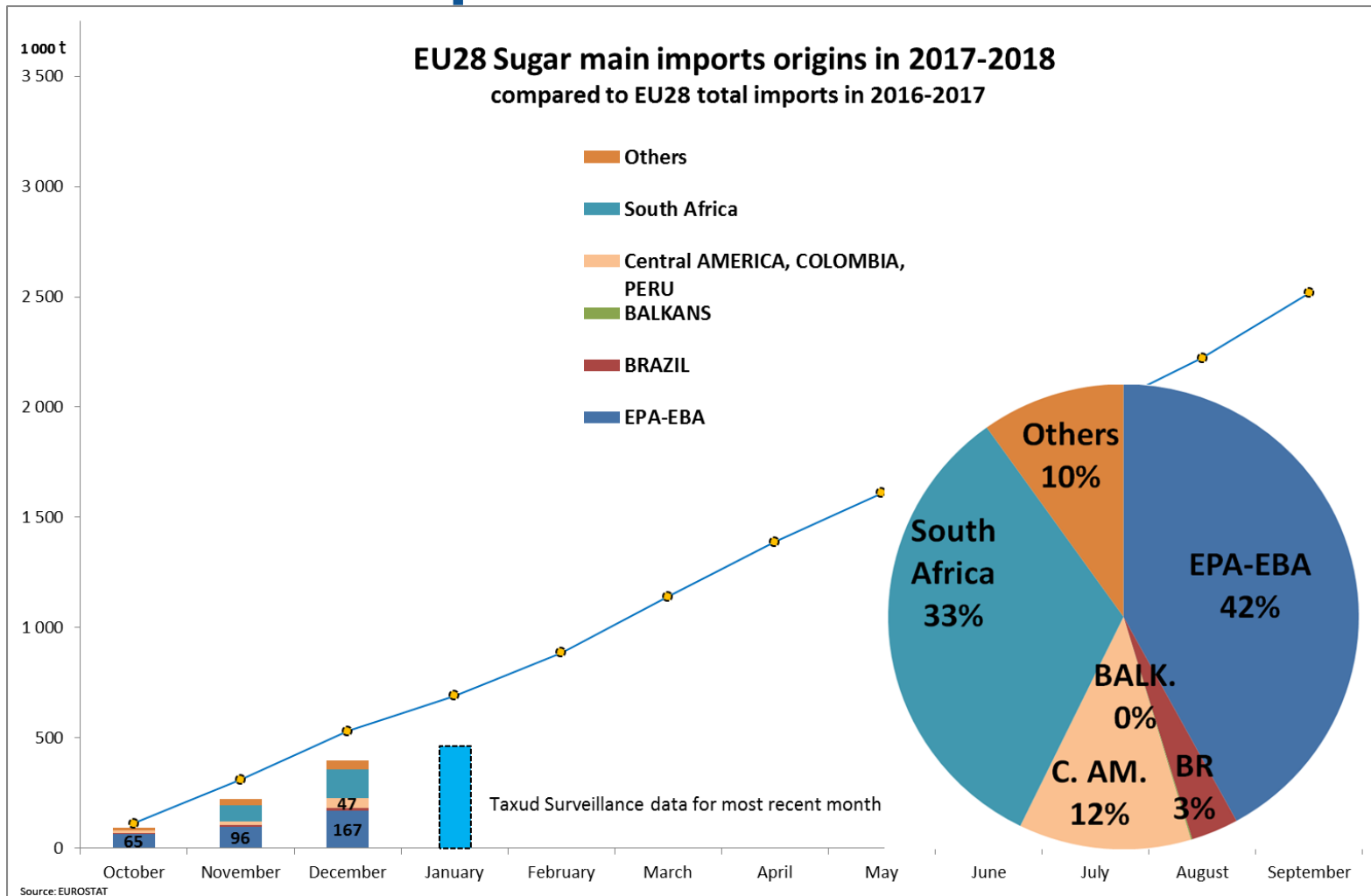
3. EU Total imports

EU27 Monthly sugar imports (CN 1701)



Sources: EUROSTAT - DG TAXUD

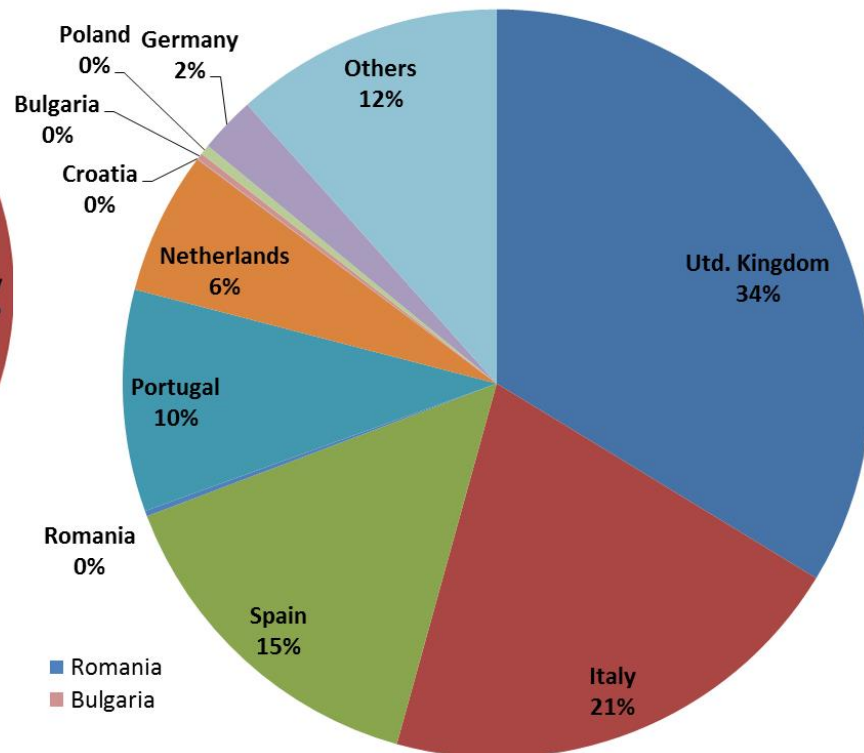
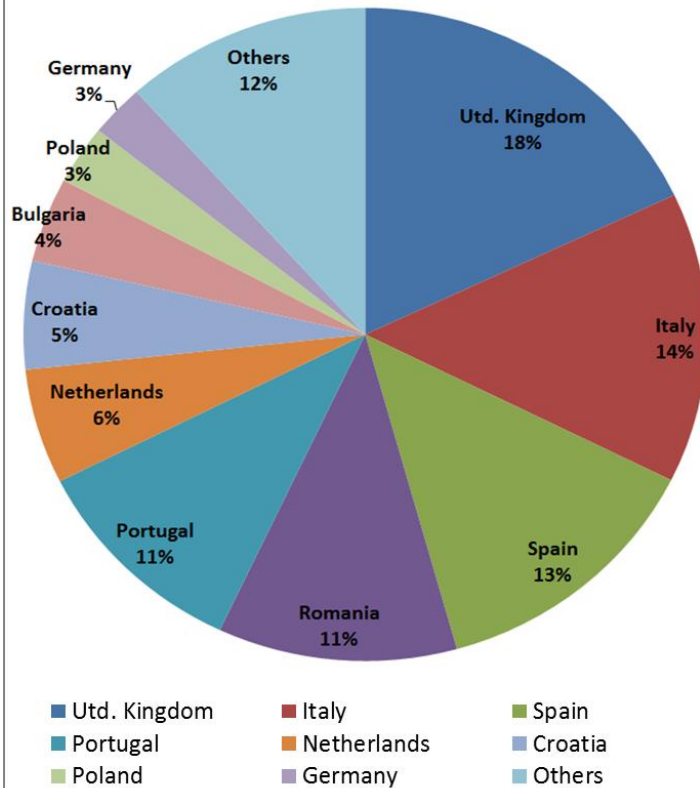
3. EU Total imports



3. EU Total imports

EU28 Top 10 Sugar importers - MY 2017-18 (3months - 0.4 miot - CN code 1701)

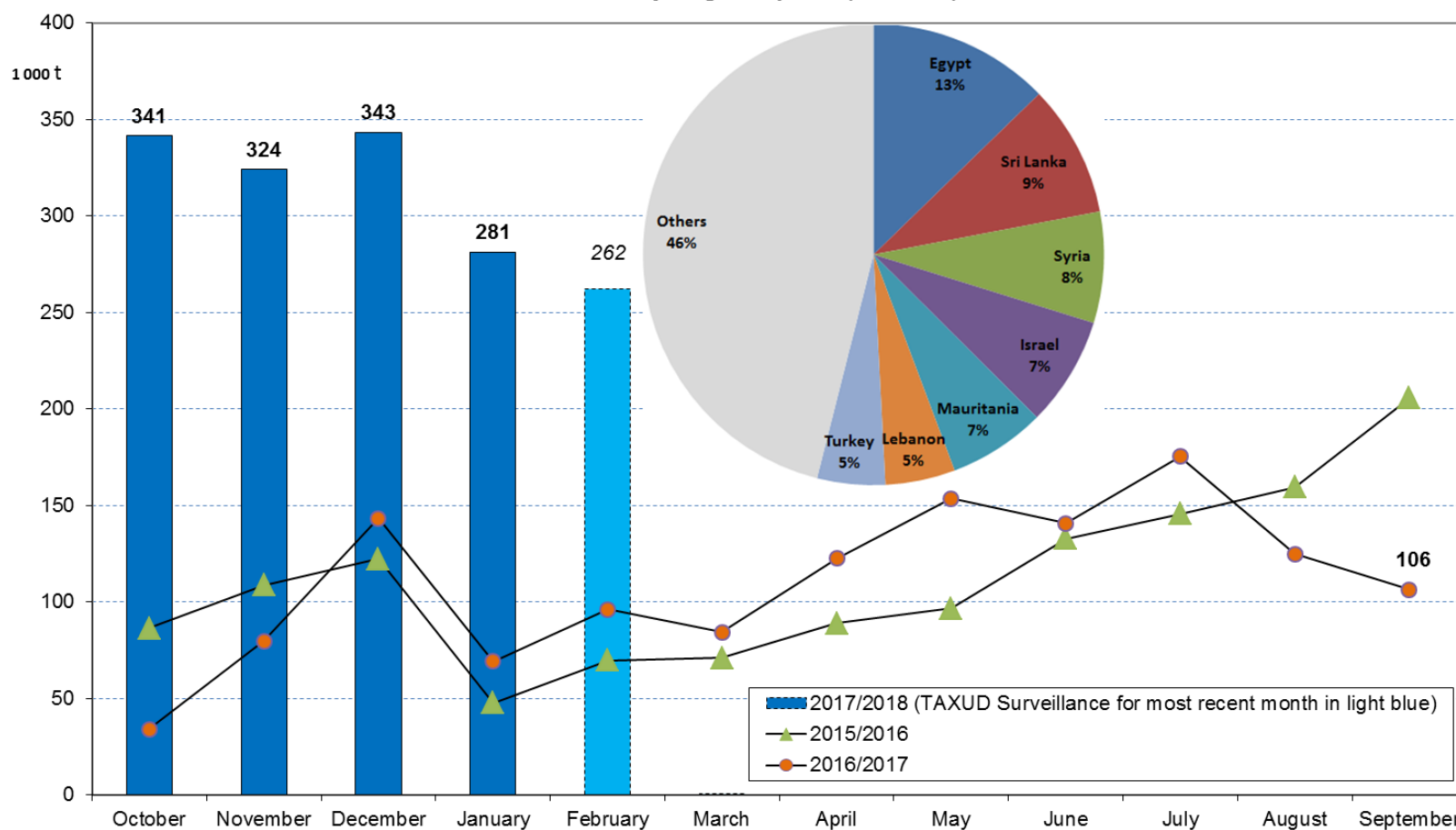
Sugar importers - 3 MY 2014 to 17 - 8.4 miot



EU Sugar Exports

4. EU Total exports

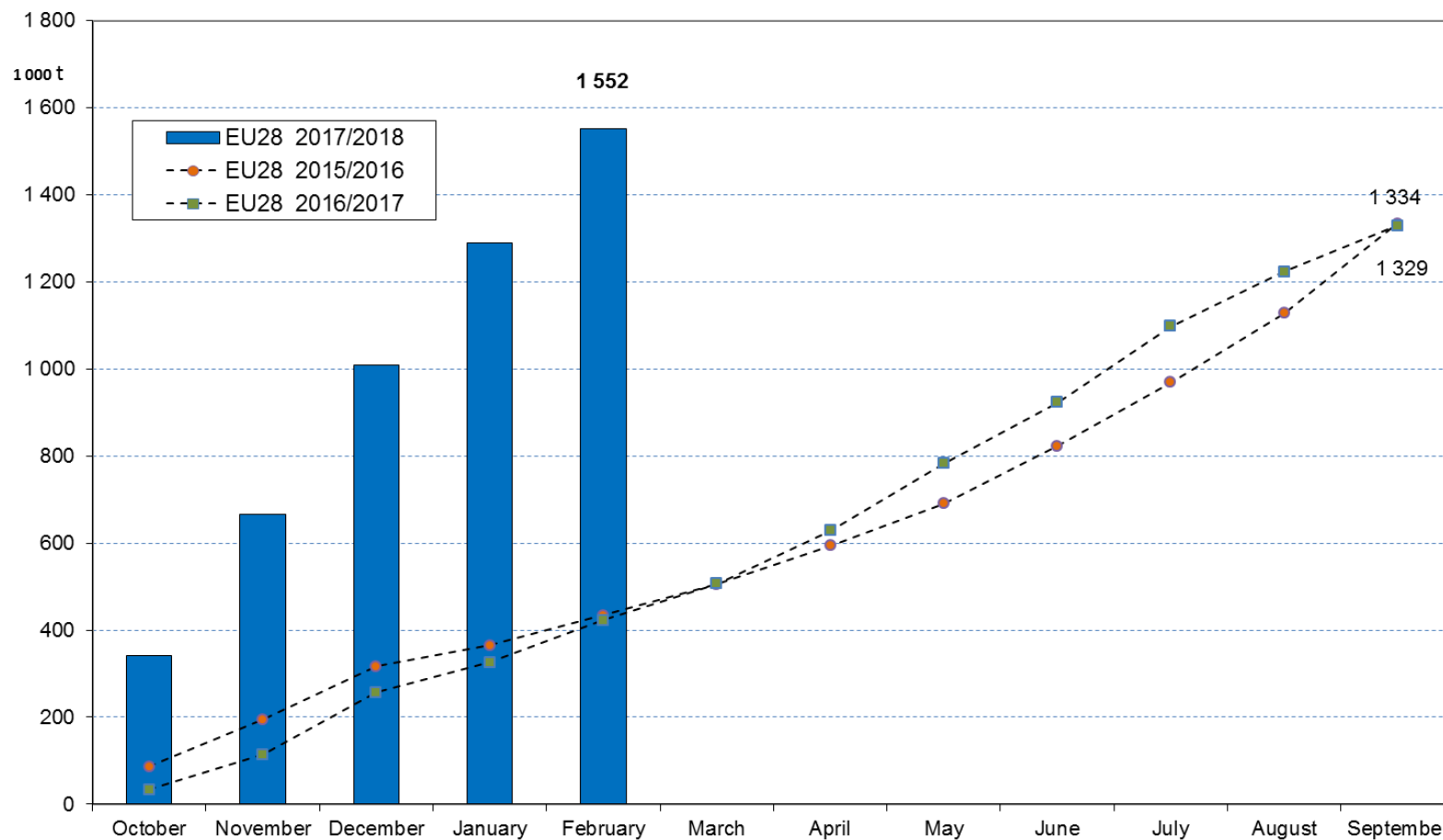
EU27 Monthly sugar exports (CN 1701)



Source: EUROSTAT - DG TAXUD

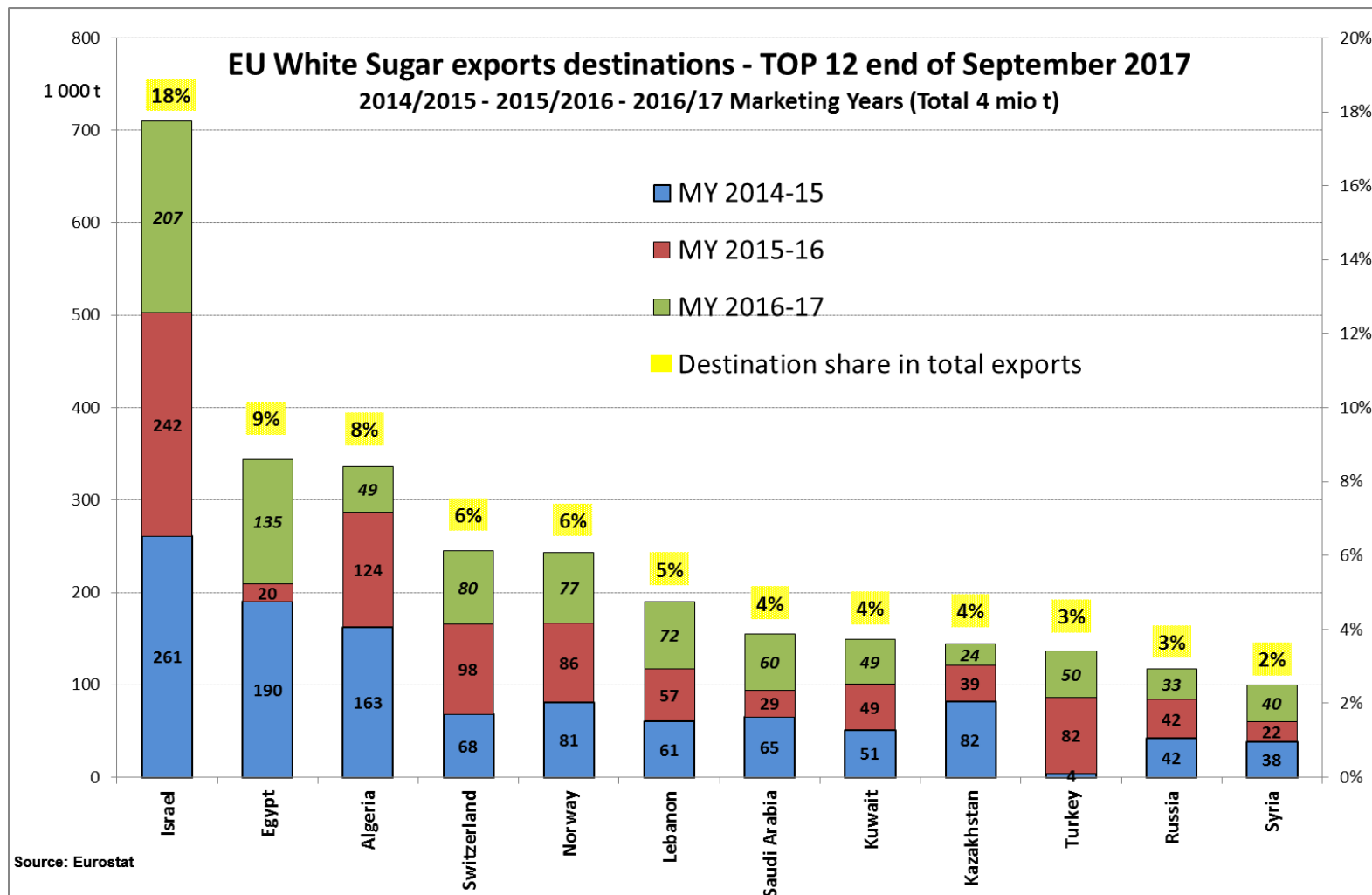
4. EU Total exports

EU cumulated exports (CN 1701)



Source: EUROSTAT

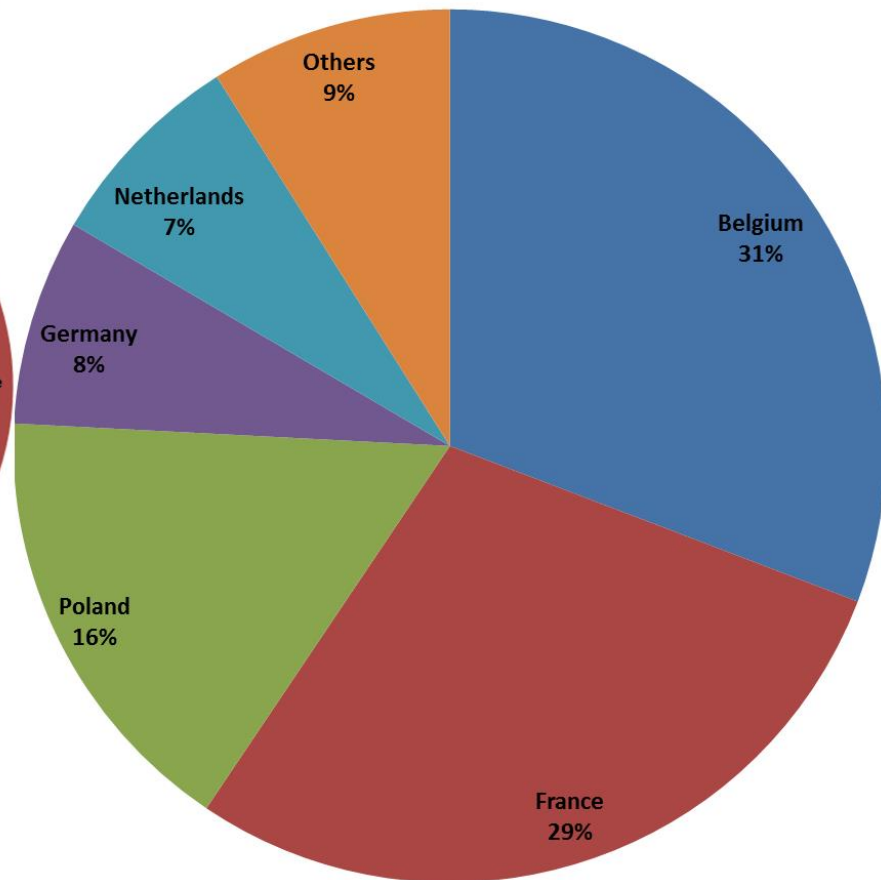
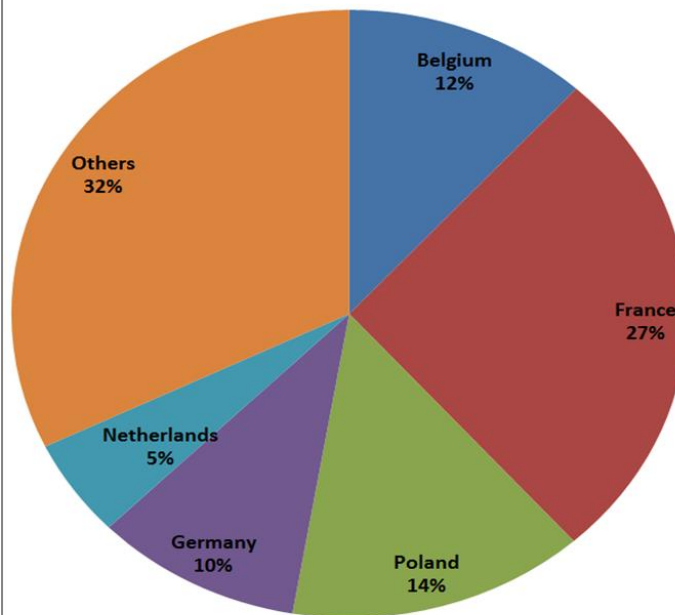
4. EU Total exports



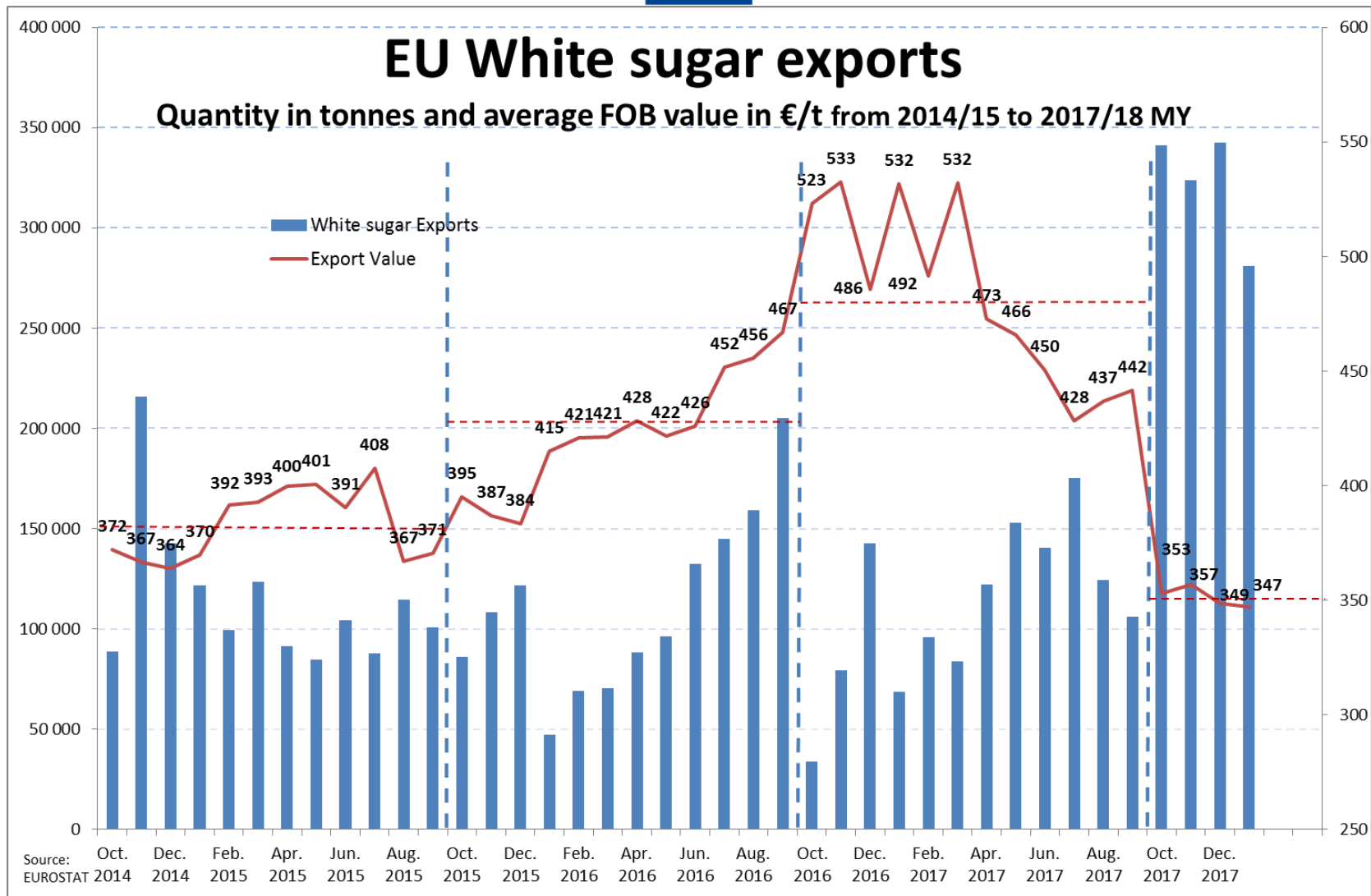
4. EU Total exports

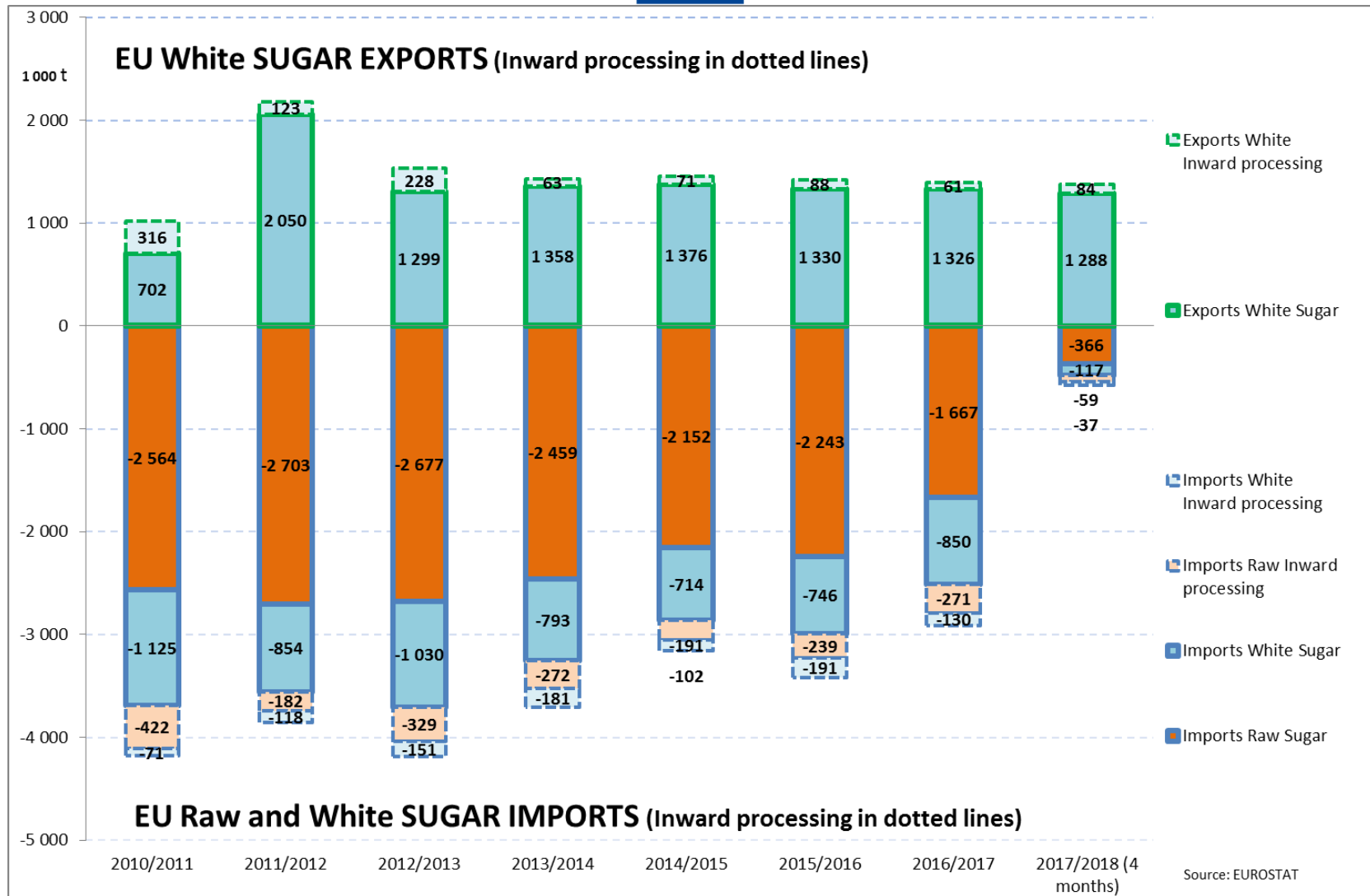
EU28 Top 5 Sugar exporters - MY 2017-18 (3 months - 1 miot - CN code 1701)

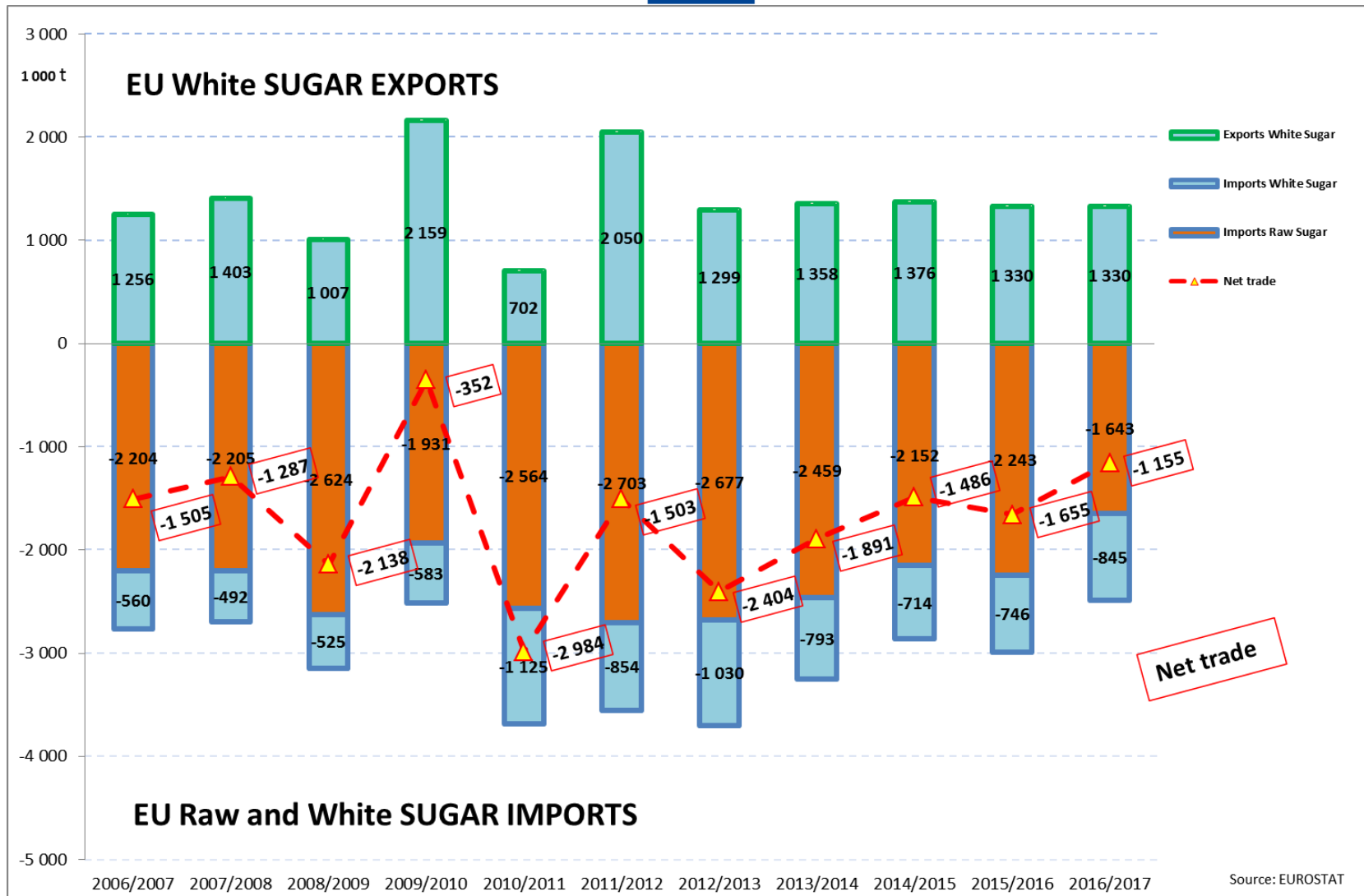
Sugar exporters - 3 MY 2014 to 17 - 4 miot



■ Belgium ■ France ■ Poland
■ Germany ■ Netherlands ■ Others

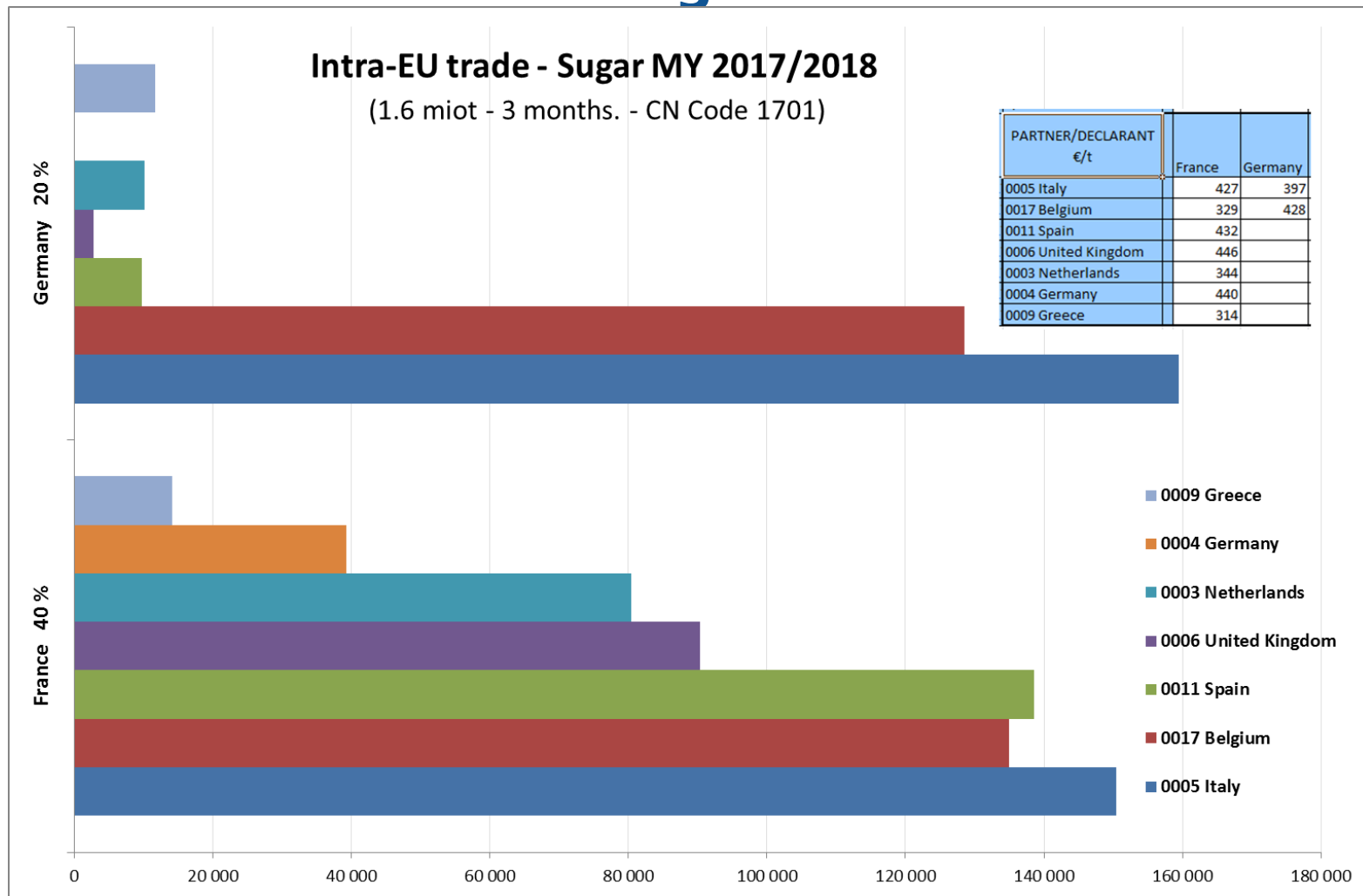






Intra - EU trade Sugar

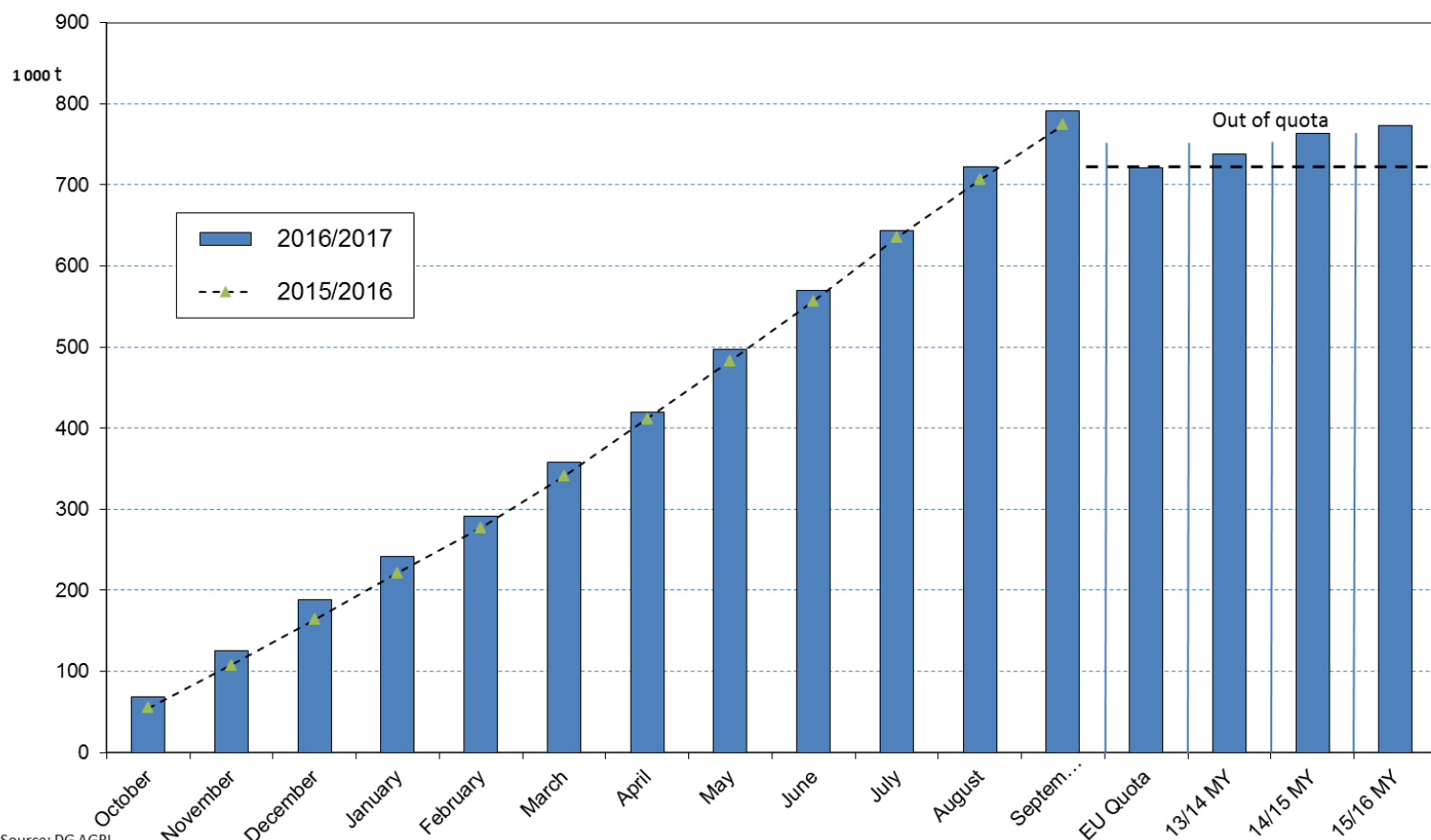
Intra-EU trade for Sugar



EU Isoglucose

Isoglucose production in 2016/17

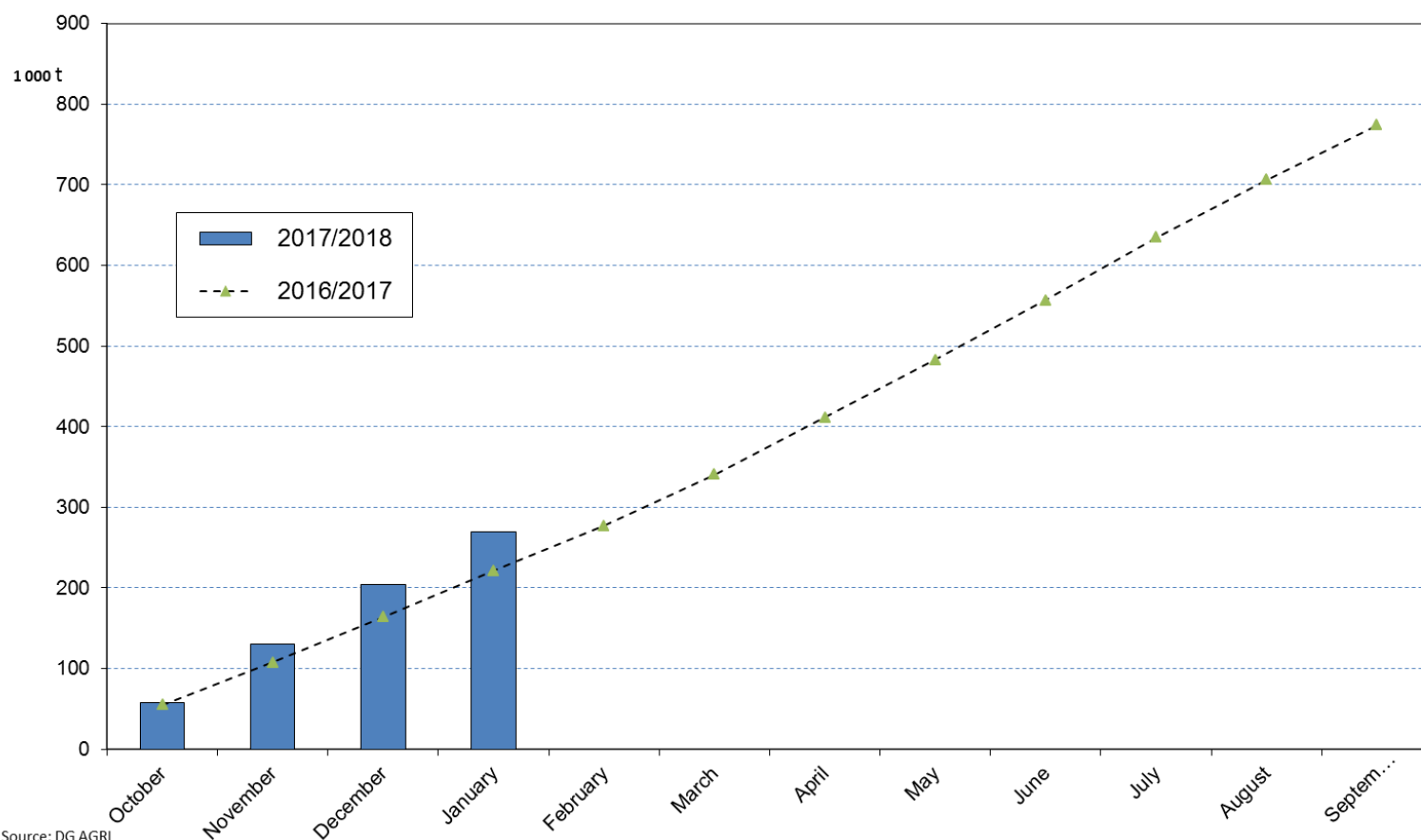
ISOGLUCOSE - EU monthly cumulated production for 2016/2017



Source: DG AGRI

Isoglucose production in 2017/18

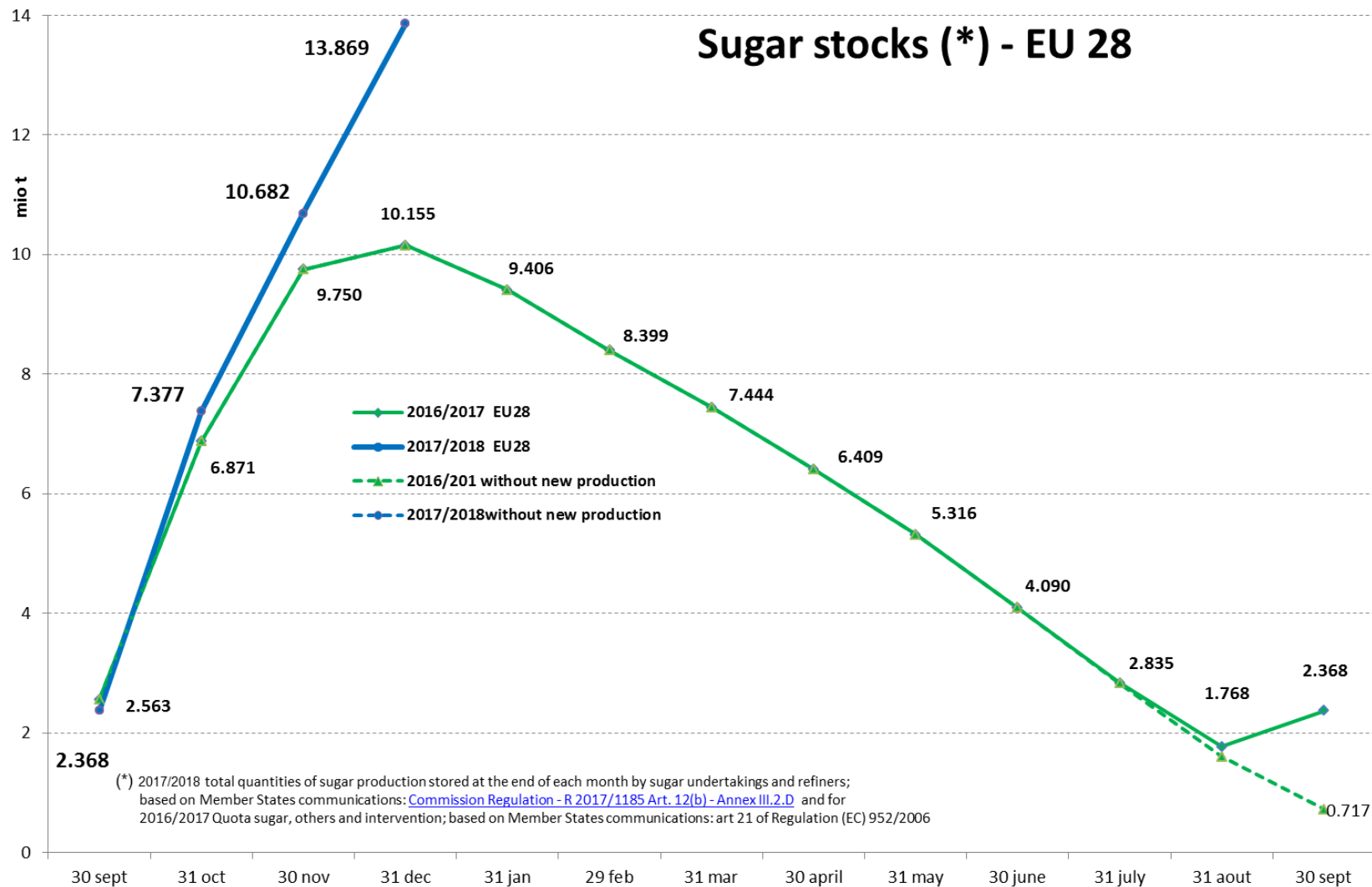
ISOGLUCOSE - EU monthly cumulated production for 2017/2018



Source: DG AGRI

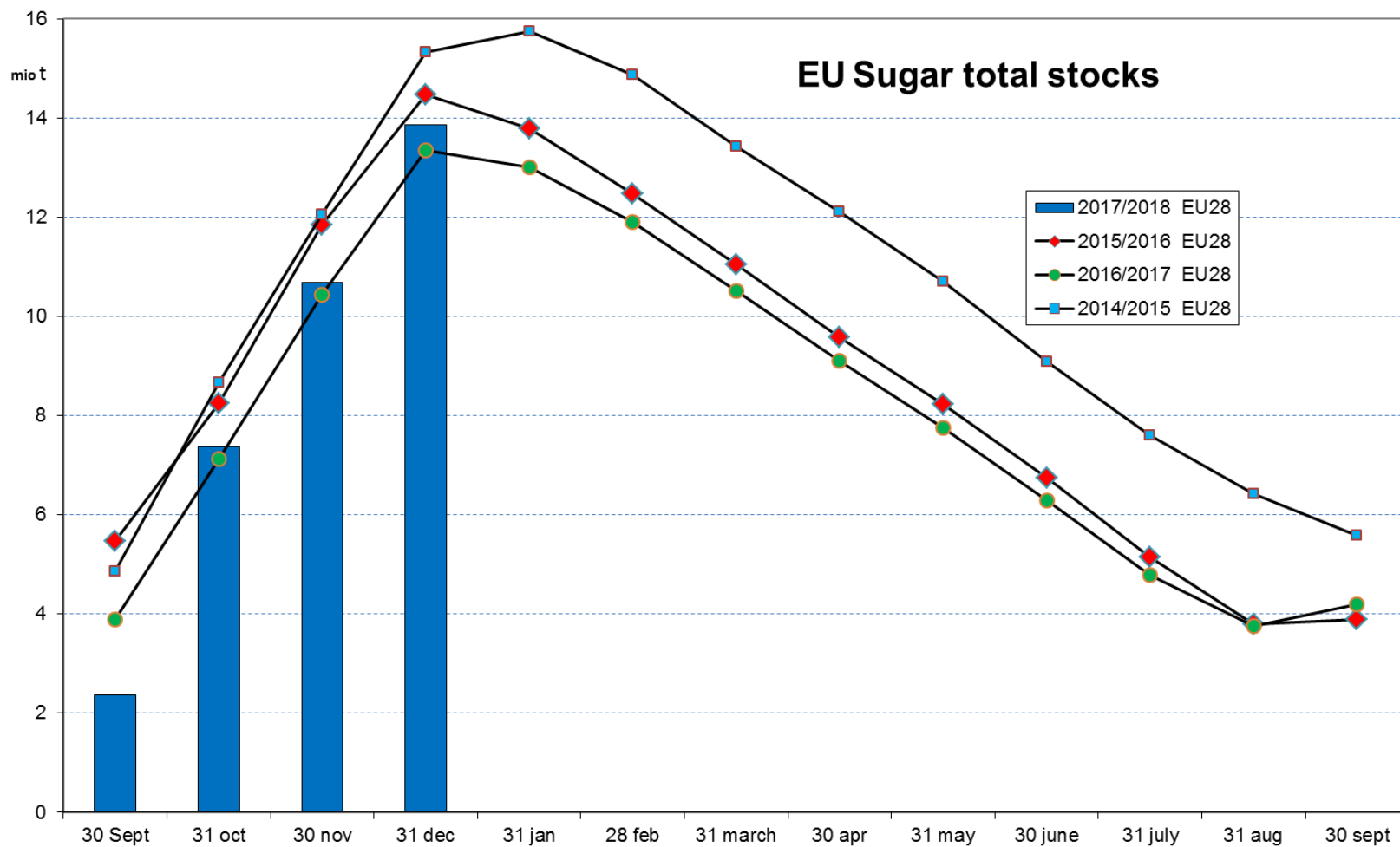
EU Sugar Stocks

Sugar stocks (*) - EU 28



(*) 2017/2018 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](#) and for 2016/2017 Quota sugar, others and intervention; based on Member States communications: art 21 of Regulation (EC) 952/2006

5. Sugar stocks



EU Sugar Balance

January 2018 update

AGRI G 4
Committee for the
Common Organisation of Agricultural Markets
25 January 2018

SUGAR AND ISOGLUCOSE PRODUCTION 2016/17

Final production of Marketing Year 2016/2017 (EU 28)

Source: Communications from Members States (R 952/2006 art 22§2)

| 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 15/16 | from 16/17 | Production | under Quota | QUOTA | QUOTA | |
| | | (a) | (b) | (c) | to 16/17 | to 17/18 | (f) = (c) + (d) - (e) | (h) | (indust. + carry.f.) | (export / release EU market) | |
| | | | | | (d) | (e) | | | (g) = (f) - (h) | | |
| BE | 676 235 | 56.4 | 11.4 | 729 058 | 34 750 | 29 786 | 734 022 | 676 235 | 57 787 | | 790 815 |
| BG | | | | | 0 | 0 | 0 | 0 | | 11 581 | 89 198 |
| CZ | 372 459 | 52.3 | 11.9 | 593 684 | 14 669 | 47 872 | 560 481 | 372 459 | 188 022 | | 372 459 |
| DK | 372 383 | 32.7 | 12.2 | 400 284 | 3 135 | 8 600 | 394 819 | 372 383 | 22 436 | | 372 383 |
| DE | 2 898 256 | 310.4 | 12.3 | 3 567 861 | 220 594 | 233 312 | 3 555 144 | 2 898 256 | 656 888 | 56 638 | 2 954 894 |
| EL | 158 702 | 5.3 | 6.0 | 221 421 | 0 | 13 519 | 207 902 | 158 702 | 49 200 | 0 | 158 702 |
| ES | 498 480 | 32.8 | 14.6 | 468 244 | 120 762 | 90 526 | 498 480 | 498 480 | 0 | 53 810 | 552 290 |
| FR (Met.) | 3 004 811 | 375.0 | 12.4 | 4 132 626 | 60 798 | 351 619 | 3 841 805 | 3 004 811 | 836 994 | | 3 004 811 |
| FR (Dom) ¹ | 432 220 | | | 547 674 | | | 547 674 | 432 220 | 115 454 | | 432 220 |
| HR | 192 877 | 18.8 | 11.0 | 362 990 | 3 613 | 60 213 | 306 390 | 192 877 | 113 513 | | 192 877 |
| IT | 508 379 | 32.4 | 7.8 | 377 838 | 166 137 | 35 785 | 508 190 | 508 190 | 0 | 30 256 | 538 446 |
| LT | 90 252 | 14.7 | 9.7 | 163 229 | 0 | 38 076 | 125 153 | 90 252 | 34 901 | | 90 252 |
| HU | 105 420 | 13.7 | 10.5 | 158 250 | 4 584 | 22 582 | 140 253 | 105 420 | 34 833 | 225 239 | 330 659 |
| NL | 804 888 | 66.8 | 13.1 | 872 805 | 25 000 | 27 500 | 870 305 | 804 888 | 65 417 | 0 | 804 888 |
| AT | 351 027 | 43.6 | 12.0 | 486 518 | 80 | 81 270 | 405 328 | 351 027 | 54 301 | | 351 027 |
| PL | 1 405 608 | 202.9 | 10.3 | 1 960 739 | 90 160 | 265 840 | 1 785 060 | 1 405 608 | 379 452 | 42 861 | 1 448 470 |
| PT (Continental) | 0 | | | 0 | | 0 | | | | 3 740 | 3 740 |
| PT (Açores) | 9 937 | 0.1 | | 9 937 | | 0 | 9 937 | 9 937 | 0 | | 9 937 |
| RO | 104 689 | 23.7 | 7.0 | 170 995 | 13 612 | 21 320 | 163 287 | 104 689 | 58 598 | | 104 689 |
| SK | 112 320 | 21.7 | 9.5 | 221 046 | 0 | 52 127 | 168 919 | 112 320 | 56 599 | 68 095 | 180 414 |
| FI | 80 999 | 11.6 | 6.1 | 137 953 | 0 | 27 842 | 110 111 | 80 999 | 29 112 | 0 | 80 999 |
| SE | 293 186 | 30.1 | 10.8 | 336 477 | 0 | 27 000 | 309 477 | 293 186 | 16 291 | | 293 186 |
| UK | 1 056 474 | 70.6 | 12.7 | 917 064 | 168 949 | 22 510 | 1 063 503 | 1 056 474 | 7 029 | | 1 056 474 |
| TOTAL | 13 529 618 | 1 416 | 11.5 | 16 836 694 | 926 845 | 1 457 299 | 16 306 240 | 13 529 413 | 2 776 827 | 684 417 | 14 213 830 |

(*) AT : including sugar from molasses

BE Travail à façon 87 000 tonnes

HR Travail à façon 155 000 tonnes

SK Travail à façon 16 000 t quota disponible

¹ FR (Dom) : included 59 354 t Antilles + 191 940 t

LT Travail à façon 20 000 tonnes

IT Travail à façon 124 000 tonnes

FI Travail à façon 67 000 t HU: TàF 15 000 tonnes

Réunion + 296 380 TAF from FR (Met)

EL Travail à façon 190 000 tonnes

RO Travail à façon 5 000 tonnes:

SE Travail à façon 12 000 t UK: TàF 20 000 tonnes

SUGAR AND ISOGLUCOSE BALANCE SHEET

2016/17 – January 2018

SUGAR AND ISOGLUCOSE

| | Final | |
|-------------------------------|---------------------------|---------------------|
| x 1000 tonnes wse | 2016/17 (oct-sept) | |
| | EU 28 | |
| | quota | out of quota |
| 1 Beginning stocks | 1 001 | 0 |
| 1 1 private | 1 001 | |
| 1 2 intervention | 0 | |
| 2 Production | 14 214 | 4 338 |
| of which quota / out-of-quota | 14 214 | 4 338 |
| release out-of-quota | 0 | 0 |
| 3 Imports | 3 034 | 7 |
| 3 1 - as such (*) | 2 480 | |
| 3 2 - in processed products | 555 | |
| 4 TOTAL AVAILABLE | 18 249 | 4 345 |
| $4 = 1 + 2 + 3$ | | |

SUGAR AND ISOGLUCOSE BALANCE SHEET

2016/17 – January 2018

SUGAR AND ISOGLUCOSE

| | Final | |
|--|---------------------------|---------------------|
| x 1000 tonnes wse | 2016/17 (oct-sept) | |
| | EU 28 | |
| | quota | out of quota |
| 5 Consumption/disappearance | 15 874 | 1 571 |
| | | indust. 800 |
| | | bioeth. 726 |
| | | isoglucose 45 |
| 6 Exports | 1 639 | 1 307 |
| 6 1 - as such (**) | 77 | |
| 6 2 in processed products | 1 562 | |
| | | carry forward |
| 7 Ending stocks | 737 | 1 467 |
| 7 1- private (of which stock declared by manufacturers and refiners) | 737 | |
| 7 2 - intervention | 0 | |
| 8 TOTAL OUTLETS | 18 249 | 4 345 |
| $8 = 5 + 6 + 7 = 4$ | | |

Forecast of the 2017/2018 production (EU 28)

2017/2018 Sugar Production

Forecast January 2018

Carry forward to 17/18
1 457 299 tonnes

Sugar Production
20.6 mio t

| tonnes white sugar equivalent | SUGAR | | | | |
|-------------------------------------|----------------|-------------|---------------------------------------|-------------------------------|--|
| | areas | yield | Production | carry forward | Total |
| | '000 ha (a) | t/ha (b) | of the campaign (c) = (a) * (b) | from 16/17 to 17/18 (d) | available Production (e) = (c) + (d) |
| BE | 64.5 | 13.1 | 843 946 | 29 786 | 873 732 |
| BG | | | | | |
| CZ | 58.3 | 10.1 | 587 124 | 47 872 | 634 996 |
| DK | 33.0 | 12.7 | 419 610 | 8 600 | 428 210 |
| DE | 374.8 | 13.2 | 4 972 011 | 233 312 | 5 205 323 |
| EL | 6.4 | 7.0 | 44 925 | 13 519 | 58 444 |
| ES | 32.8 | 15.4 | 505 601 | 90 526 | 596 128 |
| FR (Met.) | 450.8 | 13.2 | 5 955 846 | 351 619 | 6 307 465 |
| FR (Dom.) | | | 240 000 | | 240 000 |
| HR | 23.8 | 9.3 | 220 160 | 60 213 | 280 373 |
| IT | 37.0 | 8.1 | 298 107 | 35 785 | 333 892 |
| LT | 16.3 | 9.3 | 151 822 | 38 076 | 189 898 |
| HU | 15.4 | 9.6 | 147 523 | 22 582 | 170 105 |
| NL | 86.1 | 15.0 | 1 290 000 | 27 500 | 1 317 500 |
| AT | 42.8 | 10.0 | 427 466 | 81 270 | 508 736 |
| PL | 231.9 | 10.1 | 2 336 333 | 265 840 | 2 602 173 |
| PT (Continent) | | | | | |
| PT (Açores) | 0.1 | 0.0 | 10 000 | | 10 000 |
| RO | 27.2 | 4.7 | 128 217 | 21 320 | 149 537 |
| SK | 22.6 | 8.6 | 194 882 | 52 127 | 247 009 |
| FI | 12.0 | 6.0 | 71 598 | 27 842 | 99 440 |
| SE | 30.8 | 10.8 | 333 114 | 27 000 | 360 114 |
| UK | 94.3 | 14.8 | 1 400 000 | 22 510 | 1 422 510 |
| TOTAL | 1 661 | | 20 578 284 | 1 457 299 | 22 035 583 |

2017/2018 - Sugar Production

Forecast January 2018

| tonnes white sugar equivalent | SUGAR | | | | |
|-------------------------------------|-------------------------|----------------------|---|--|---|
| | areas '000 ha (a) | yield t/ha (b) | Production of the campaign (c) = (a) * (b) | carry forward from 16/17 to 17/18 (d) | Total available Production (e) = (c) + (d) |
| BE | 64.5 | 13.1 | 843 946 | 29 786 | 873 732 |
| BG | | | | | |
| CZ | 58.3 | 10.1 | 587 124 | 47 872 | 634 996 |
| DK | 33.0 | 12.7 | 419 610 | 8 600 | 428 210 |
| DE | 374.8 | 13.2 | 4 972 011 | 233 312 | 5 205 323 |
| EL | 6.4 | 7.0 | 44 925 | 13 519 | 58 444 |
| ES | 32.8 | 15.4 | 505 601 | 90 526 | 596 128 |
| FR (Met.) | 450.8 | 13.2 | 5 955 846 | 351 619 | 6 307 465 |
| FR (Dom.) | | | 240 000 | | 240 000 |
| HR | 23.8 | 9.3 | 220 160 | 60 213 | 280 373 |
| IT | 37.0 | 8.1 | 298 107 | 35 785 | 333 892 |
| LT | 16.3 | 9.3 | 151 822 | 38 076 | 189 898 |

Production forecasts communicated by Member States in yellow, other forecasts based on area and average yield

2017/2018 - Sugar Production

Forecast January 2018

| tonnes white sugar equivalent | SUGAR | | | | |
|-------------------------------------|---------|-------|--------------------|------------------------|-------------------------|
| | areas | yield | Production | carry forward | Total |
| | '000 ha | t/ha | of the campaign | from 16/17 to 17/18 | available Production |
| | (a) | (b) | (c) = (a) * (b) | (d) | (e) = (c) + (d) |
| HU | 15.4 | 9.6 | 147 523 | 22 582 | 170 105 |
| NL | 86.1 | 15.0 | 1 290 000 | 27 500 | 1 317 500 |
| AT | 42.8 | 10.0 | 427 466 | 81 270 | 508 736 |
| PL | 231.9 | 10.1 | 2 336 333 | 265 840 | 2 602 173 |
| PT (Continent) | | | | | |
| PT (Açores) | 0.1 | 0.0 | 10 000 | | 10 000 |
| RO | 27.2 | 4.7 | 128 217 | 21 320 | 149 537 |
| SK | 22.6 | 8.6 | 194 882 | 52 127 | 247 009 |
| FI | 12.0 | 6.0 | 71 598 | 27 842 | 99 440 |
| SE | 30.8 | 10.8 | 333 114 | 27 000 | 360 114 |
| UK | 94.3 | 14.8 | 1 400 000 | 22 510 | 1 422 510 |
| TOTAL | 1 661 | | 20 578 284 | 1 457 299 | 22 035 583 |

Production forecasts communicated by Member States in yellow, other forecasts based on area and average yield

SUGAR BALANCE SHEET

2017/18 – January 2018

| Forecast | |
|-----------------------------|-----------------------------|
| 2017/18 (oct-sept) EU 28 | |
| x 1000 tonnes wse | |
| Sugar | |
| 2 174 | 1 Beginning stocks |
| 20 578 | 2 Production |
| 1 855 | 3 Imports |
| 1 300 | 3 1 - as such (*) |
| 555 | 3 2 - in processed products |
| 24 607 | 4 TOTAL AVAILABLE |
| | $4 = 1 + 2 + 3$ |

| Forecast | |
|-----------------------------|-----------------------------|
| 2017/18 (oct-sept) EU 28 | |
| x 1000 tonnes wse | |
| Sugar | |
| 17 650 | 5 Consumption/disappearance |
| 800 | of which industrial use |
| 1 350 | of which bioethanol |
| 15 500 | other |
| 4 800 | 6 Exports |
| 3 200 | 6 1 - as such (**) |
| 1 600 | 6 2 in processed products |
| 2 158 | 7 Ending stocks |
| 24 607 | 8 TOTAL OUTLETS |
| | $8 = 5 + 6 + 7 = 4$ |

ISOGLUCOSE BALANCE SHEET

2017/18 – January 2018

| Forecast | |
|------------------------------------|--|
| 2017/18 (oct-sept) EU 28 | x 1000 tonnes wse |
| Isoglucose | |
| 29 | 1 Beginning stocks |
| 900 | 2 Production |
| 10 | 3 Imports 3 1 - as such (*) 3 2 - in processed products |
| 939 | 4 TOTAL AVAILABLE $4 = 1 + 2 + 3$ |

| Forecast | |
|------------------------------------|---|
| 2017/18 (oct-sept) EU 28 | x 1000 tonnes wse |
| Isoglucose | |
| 860 | 5 Consumption/disappearance of which industrial use of which bioethanol other |
| 50 | 6 Exports 6 1 - as such (**) 6 2 in processed products |
| 29 | 7 Ending stocks |
| 939 | 8 TOTAL OUTLETS $8 = 5 + 6 + 7 = 4$ |



*Thank you
for your attention*