



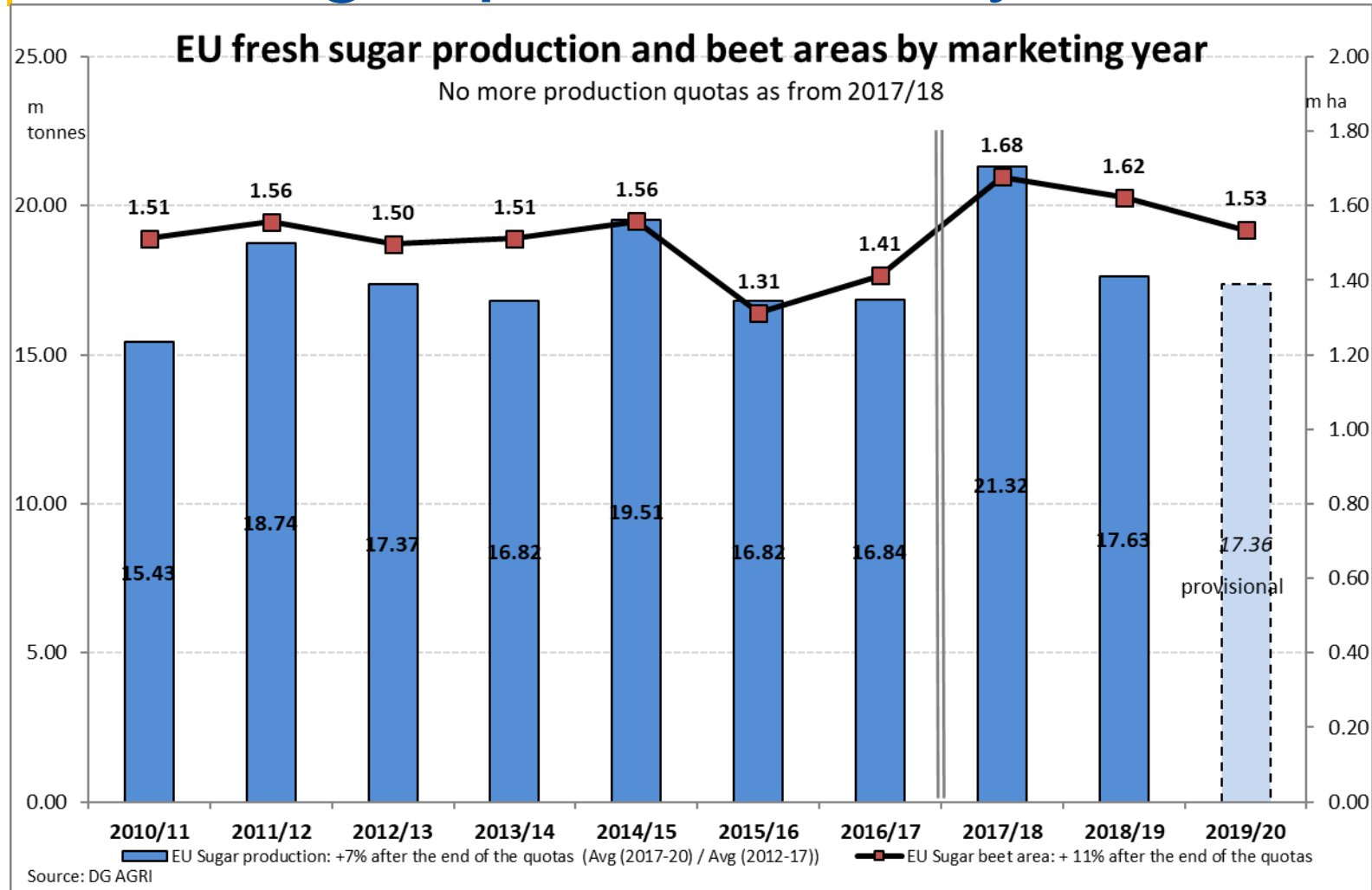
# EU Sugar Balance

AGRI G 4

Economic Board of the Sugar Market Observatory

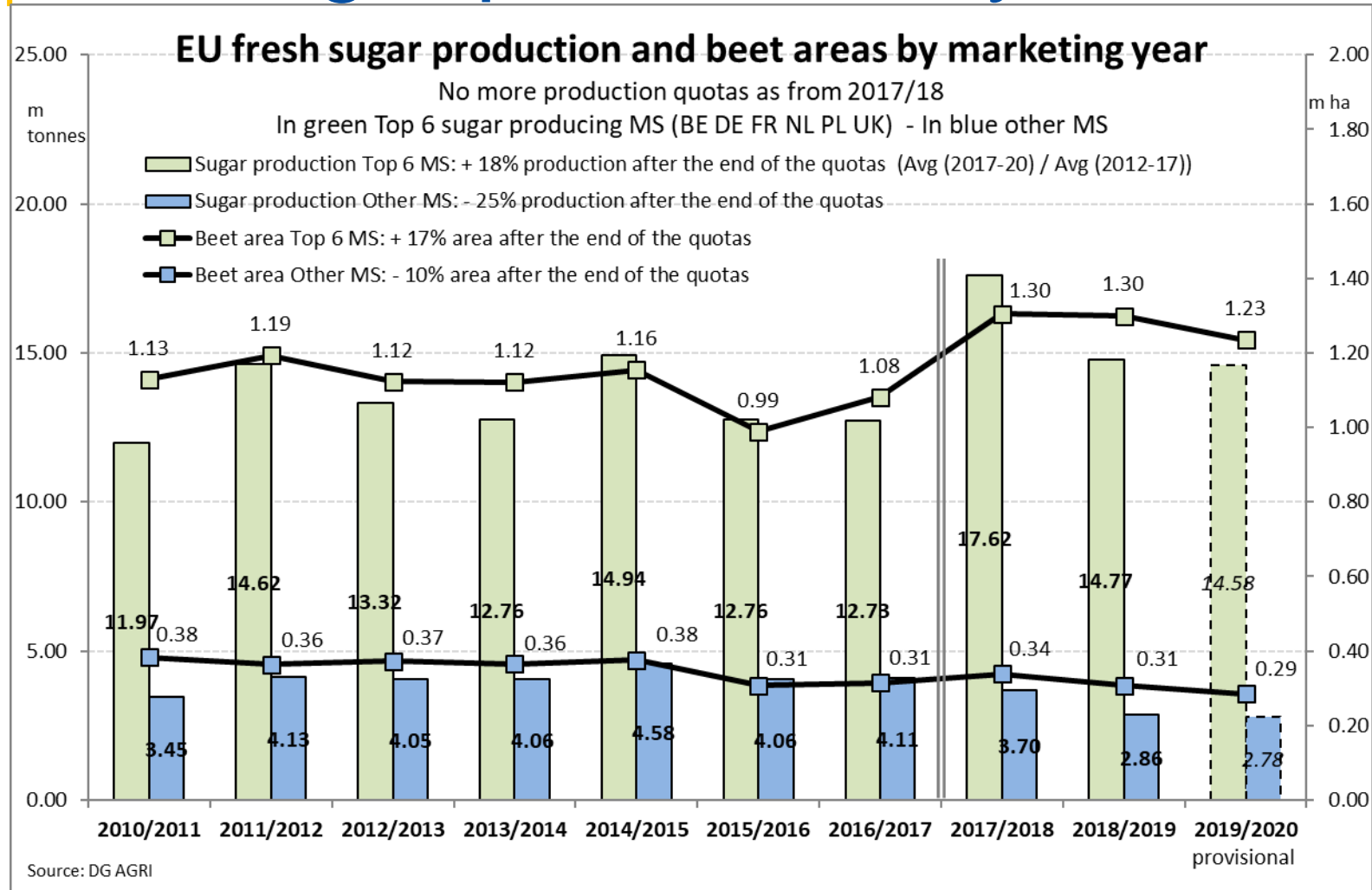
*May 2020 update*

# EU Sugar production by Marketing Year



- 2019/20 (provisional) compared to 2018/19
- Area - 5.5%
- Production - 1.6%

# EU Sugar production by Marketing Year



- Top 6 sugar producing MS in 2019/20 (provisional) compared to 2018/19
- Area - 5%
- Production - 1.3%

# 2019/2020 - Sugar Production – April 2020

Provisional SUGAR production 2019/20					Provisional SUGAR production 2019/20				
<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b) = (c) / (a)	Production of the campaign (c)	% increase compared to 2018/2019	<i>tonnes white sugar equivalent</i>	areas '000 ha (a)	yield t/ha (b) = (c) / (a)	Production of the campaign (c)	% increase compared to 2018/2019
BE	58.8	13.4	790 555	-4%	HU	13.5	7.5	101 550	-8%
BG					NL	80.7	13.6	1 099 278	
CZ	56.2	9.3	522 473	-9%	AT	28.0	10.7	300 196	-8%
DK	29.3	11.4	332 678	-5%	PL	240.9	8.6	2 065 252	-6%
DE	375.6	11.5	4 326 702	2%	PT (Continent)				
EL	1.3	0.0			PT (Açores)				
ES	27.6	15.0	414 183	5%	RO	23.1	6.0	138 167	
FR (Met.)	388.4	12.8	4 956 641	-3%	SK	22.7	7.1	159 717	
FR (Dom.)			171 333		FI	10.7	7.0	74 550	
HR	14.5	7.4	107 037	-10%	SE	26.6	10.8	288 014	3%
IT	30.2	6.0	182 167	-16%	<b>TOTAL EU</b>	1 443	11.2	<b>16 186 550</b>	
LT	15.5	10.1	156 057	6%	UK	90.2	13.0	1 170 000	2%
					<b>TOTAL EU + UK</b>	1 534	11.3	<b>17 356 550</b>	-2%

Provisional sugar production communicated by MS,  
except for DK (production forecast based on areas and long term production);  
and for UK (production estimate).

# SUGAR BALANCE SHEET

## 2019/20 – May 2020

Provisional				
2019/20 (oct-sept)		x 1000 tonnes wse		
EU + UK				
Sugar	Isoglucose			
1 829	18	1 <b>Beginning stocks</b>		
17 357	570	2 <b>Production</b>		
2 550	5	3 <b>Imports</b>		
<table border="0"> <tr> <td style="border-right: 1px solid black; padding-right: 5px;">2 000</td> <td>550</td> </tr> </table>	2 000	550		3 1 - as such 3 2 - in processed products
2 000	550			
21 735	593	4 <b>TOTAL AVAILABLE</b>		
		<i>4 = 1 + 2 + 3</i>		

May 20 update compared to Dec. 19:

- Provisional production similar to forecast.
- Imports stable at 2 mt
- Reduced sugar imports in processed products
- Reduced isoglucose production

# SUGAR BALANCE SHEET

## 2019/20 – May 2020

Provisional		
2019/20 (oct-sept)		x 1000 tonnes wse
EU + UK		
Sugar	Isoglucose	
17 051	530	<b>5 Consumption/disappearance</b>
800		of which industrial use
650		of which bioethanol
15 601		other
2 700	45	<b>6 Exports</b>
1 000		6 1 - as such
1 700		6 2 in processed products
1 985	18	<b>7 Ending stocks</b>
21 735	593	<b>8 TOTAL OUTLETS</b>
		$8 = 5 + 6 + 7 = 4$

May 20 update compared to Dec. 19:

- Consumption reduced by 0.25 mt
- Exports reduced by 0.2mt
- Reduced sugar exports in processed products
- Final stocks increased by 0.45 mt

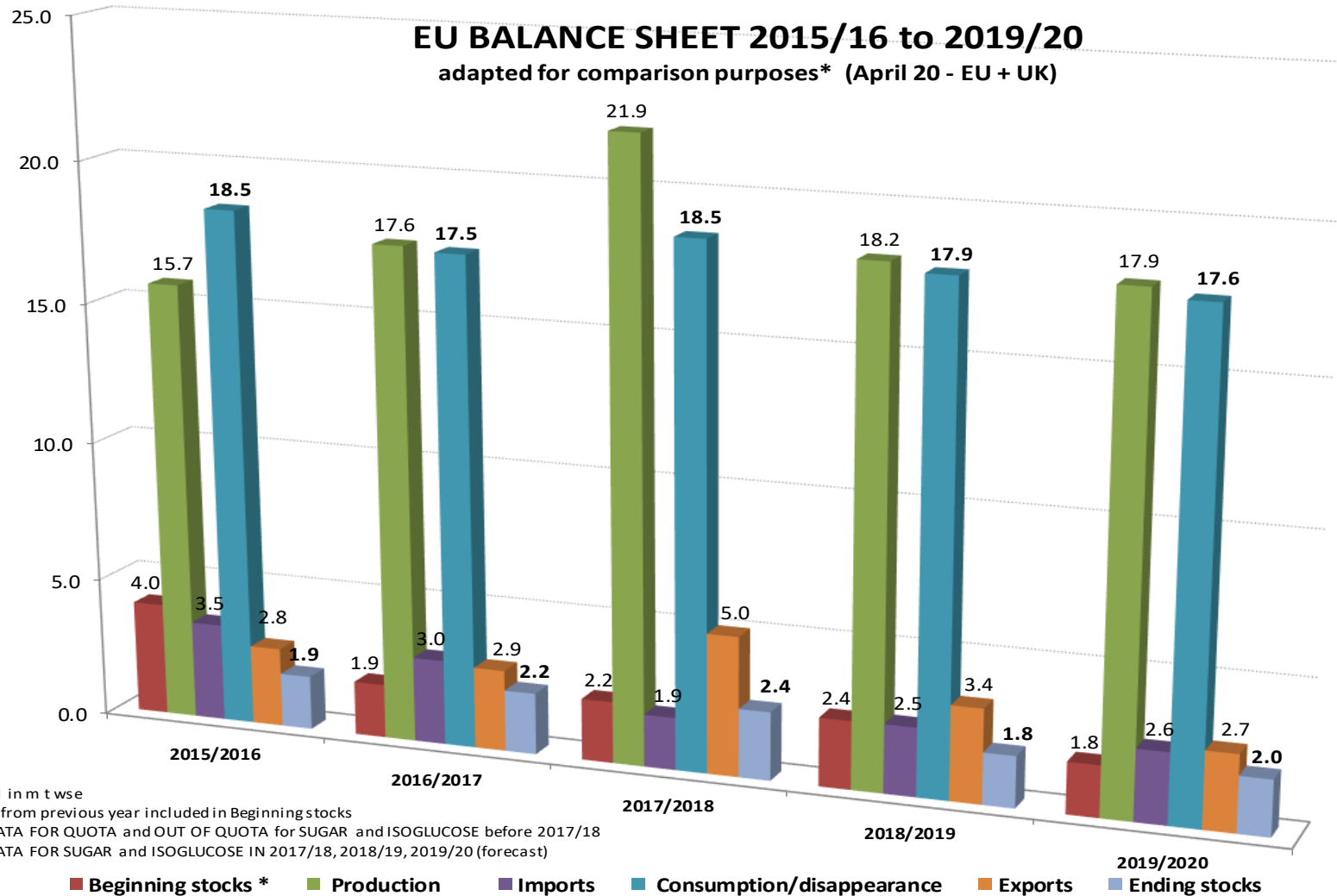
# SUGAR AND ISOGLUCOSE BALANCE SHEET

## 2017/18 – 2019/20 May 2020

Final		Final		Provisional		x 1000 tonnes wse
2017/18 (oct-sept) EU 28		2018/19 (oct-sept) EU 28		2019/20 (oct-sept) EU + UK		
Sugar	Isoglucose	Sugar	Isoglucose	Sugar	Isoglucose	
2 174	29	2 423	27	1 829	18	<b>1 Beginning stocks</b>
21 317	602	17 631	561	17 357	570	<b>2 Production</b>
1 869   1 287   583	10	2 461   1 882   579	5	2 550   2 000   550	5	<b>3 Imports</b> 3 1 - as such 3 2 - in processed products
25 360	641	22 515	592	21 735	593	<b>4 TOTAL AVAILABLE</b> $4 = 1 + 2 + 3$
17 977   850   900   16 227	570	17 351   800   750   15 801	529	17 051   800   650   15 601	530	<b>5 Consumption/disappearance</b> of which industrial use of which bioethanol other
4 961   3 353   1 608	45	3 335   1 610   1 725	45	2 700   1 000   1 700	45	<b>6 Exports</b> 6 1 - as such 6 2 in processed products
2 423	27	1 829	18	1 985	18	<b>7 Ending stocks</b>
25 360	641	22 515	592	21 735	593	<b>8 TOTAL OUTLETS</b> $8 = 5 + 6 + 7 = 4$

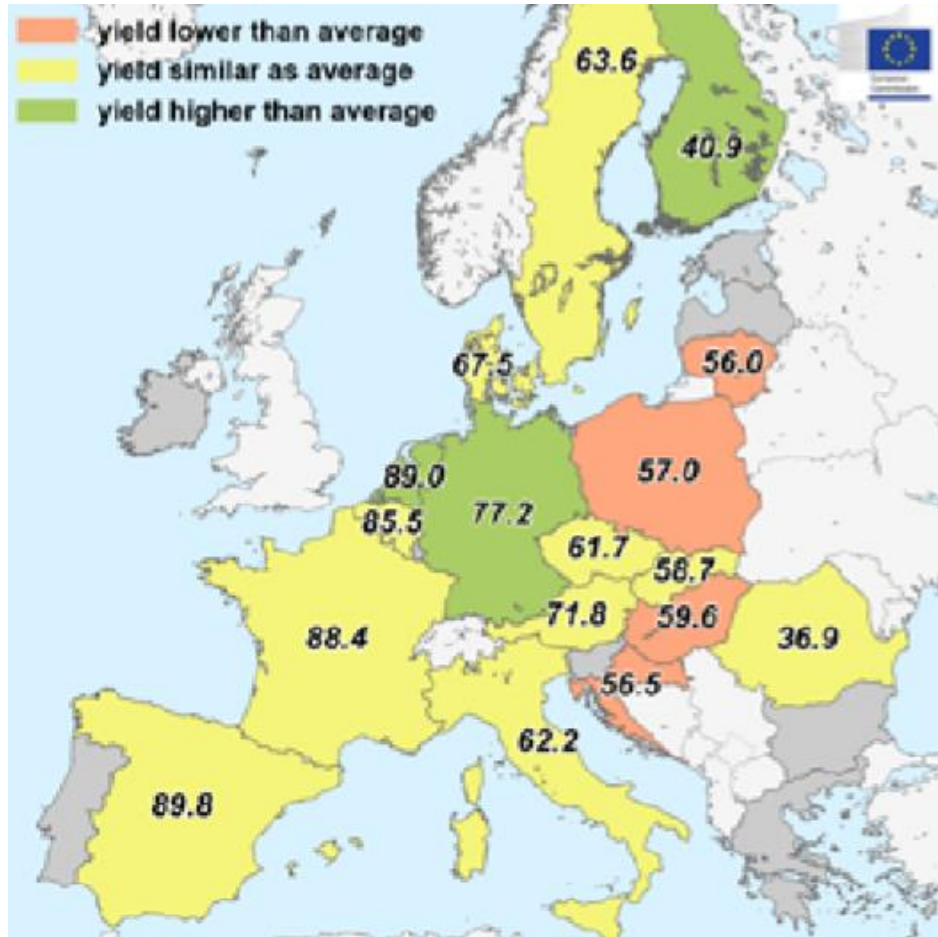
# SUGAR BALANCE SHEET

## 2019/20 – May 2020





# 2020/21 Sugar beet yield forecast



- Actual yield versus average yield 2015 – 2019
  - Avg 5yrs = 77.7 t/ha
  - MARS = 75.4 t/ha
  - (+0.9% 20/5yrs)
  - (68.9 t/ha in 2018)
- MARS Bulletin Vol 28 No 5 (2020) May 2020

# Thank you

Disclaimer:

“The United Kingdom is no longer a Member State of the European Union, however where it is deemed relevant (e.g. for comparison purposes) an EU+UK aggregate may still be displayed.”