



Sugar Market situation

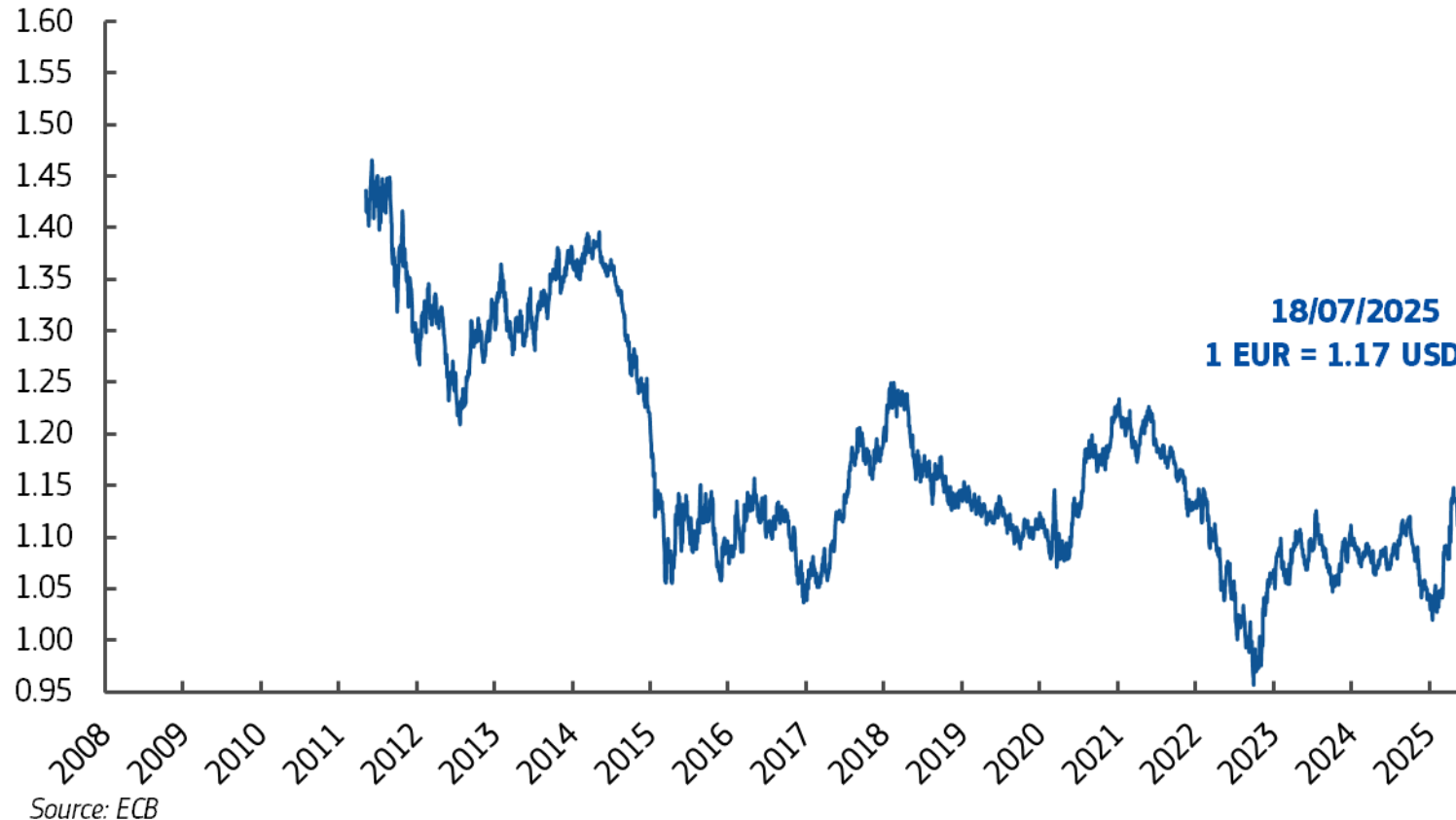
AGRI E 4 - Expert Group Common Market Organisation on
Arable Crops

24 July 2025

World Sugar Market

Exchange rates (18/07/2025)

ECB euro exchange rate to the USD



- Euro – Dollar exchange rate:
1 € = \$ 1.17
- One month ago*
1€ = \$ 1.15

*Figures presented at the previous Committee

Exchange rates (18/07/2025)

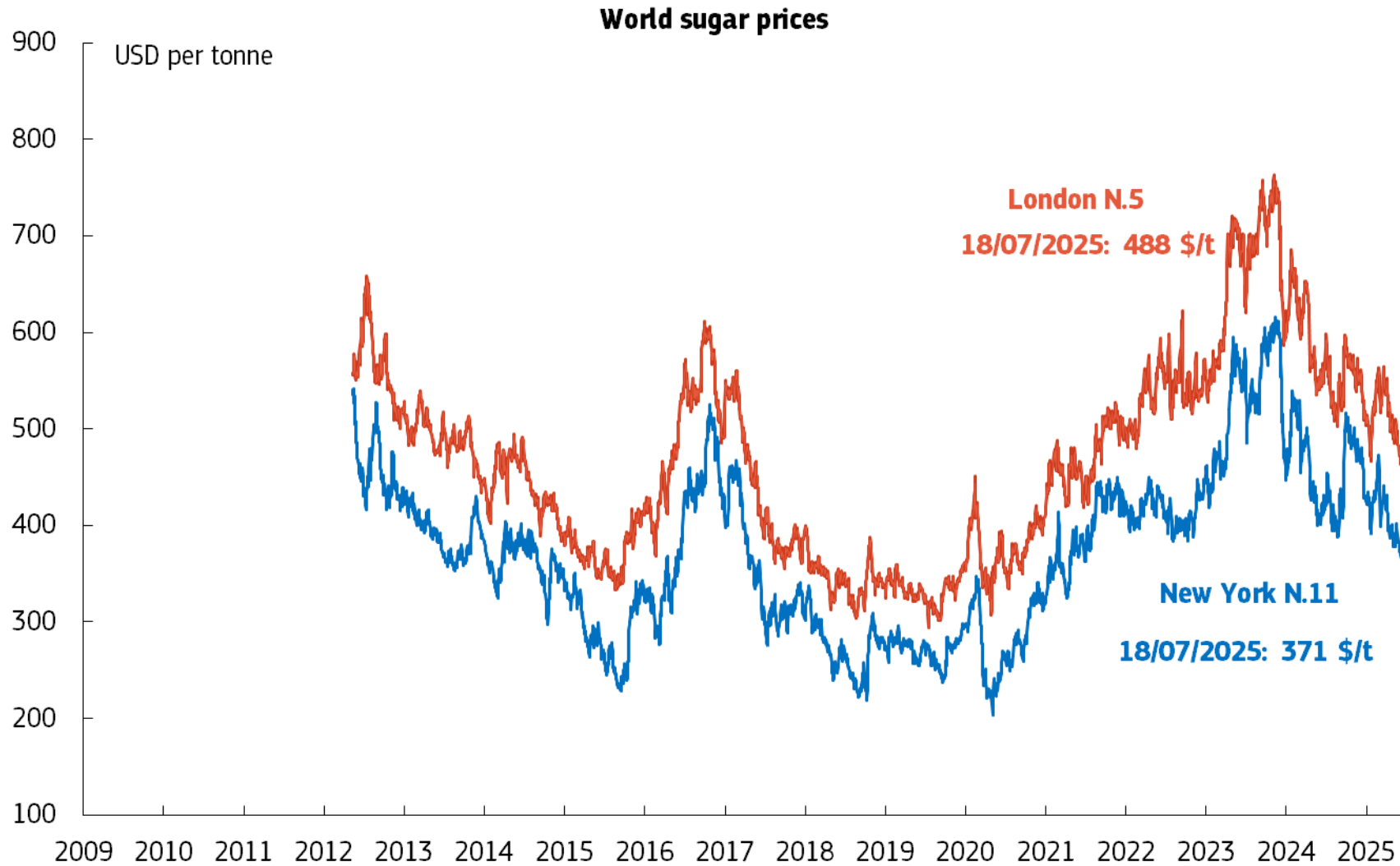
ECB euro exchange rate to the Brazilian real



- Euro – Real exchange rate:
1 € = 6.47 Real
- One month ago*:
1€ = 6.31 Real

*Figures presented at the previous Committee

World prices



Source: ICE

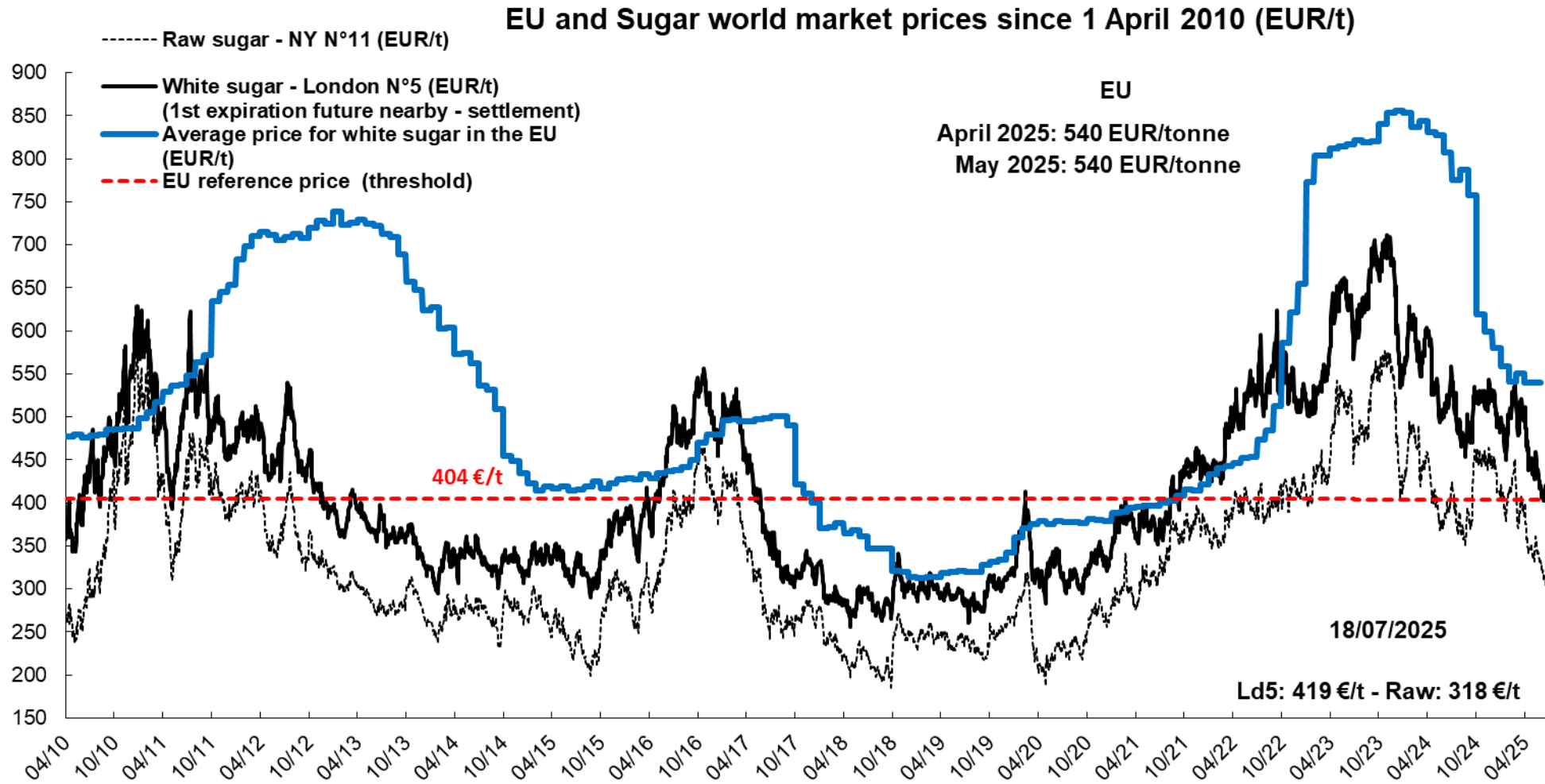
World prices

- **White sugar** (18/07/2025 vs. 20/06/2025)
 - Oct. 25 : 487.7 \$/t (+4.4%; 418.6 €/t)
 - Dec. 25: 476.4 \$/t (+3.3%; 408.9 €/t)
- **Raw sugar** (18/07/2025 vs. 20/06/2025)
 - Oct. 25: 16.82 \$cts/lb (+1.5%; 318.3 €/t)
 - Mar. 26: 17.43 \$cts/lb (+1.5%; 329.8 €/t)

White premium: 116.9 \$/t on Oct./Oct. basis (white/raw).

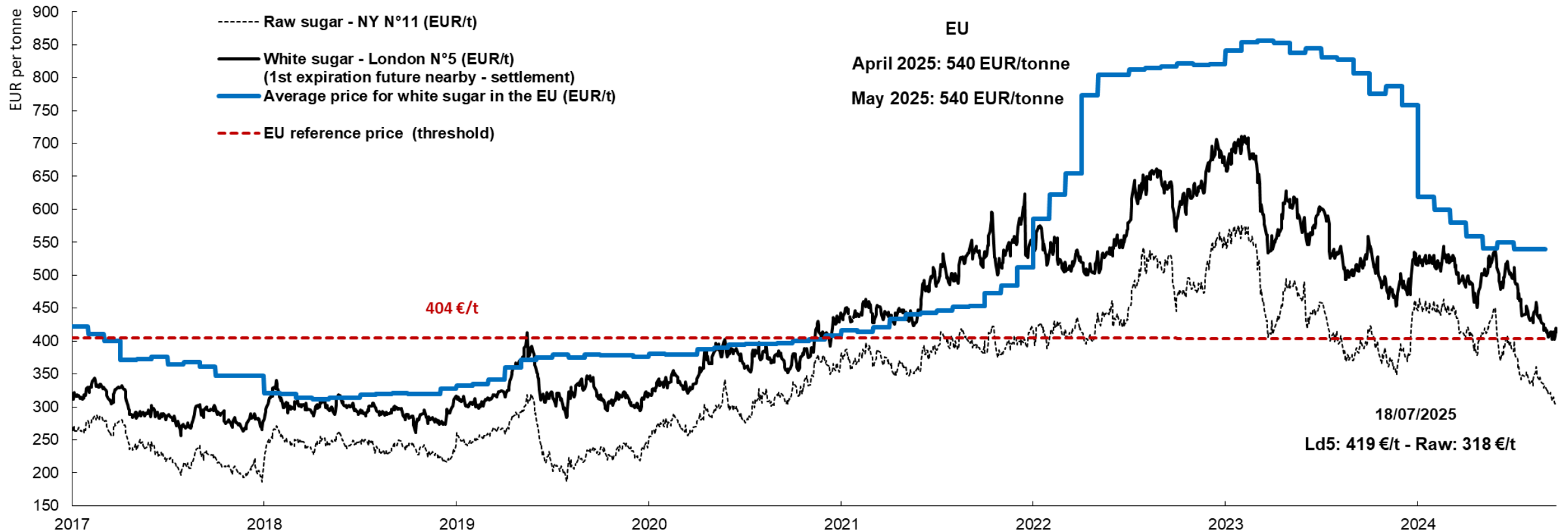
- White sugar hit a contract high of 763.4 \$ per tonne on Monday 6 Nov. 23, its highest since 12 Sep. 2011
- Raw sugar peaked at 27.95 cents on Monday 6 Nov. 23., its highest since 15 Sep. 2011
- White premium –EUR3.3 compared to previous meeting (-2.7%).

World prices



World prices

EU and Sugar world market prices since 1 October 2017 (EUR/t)



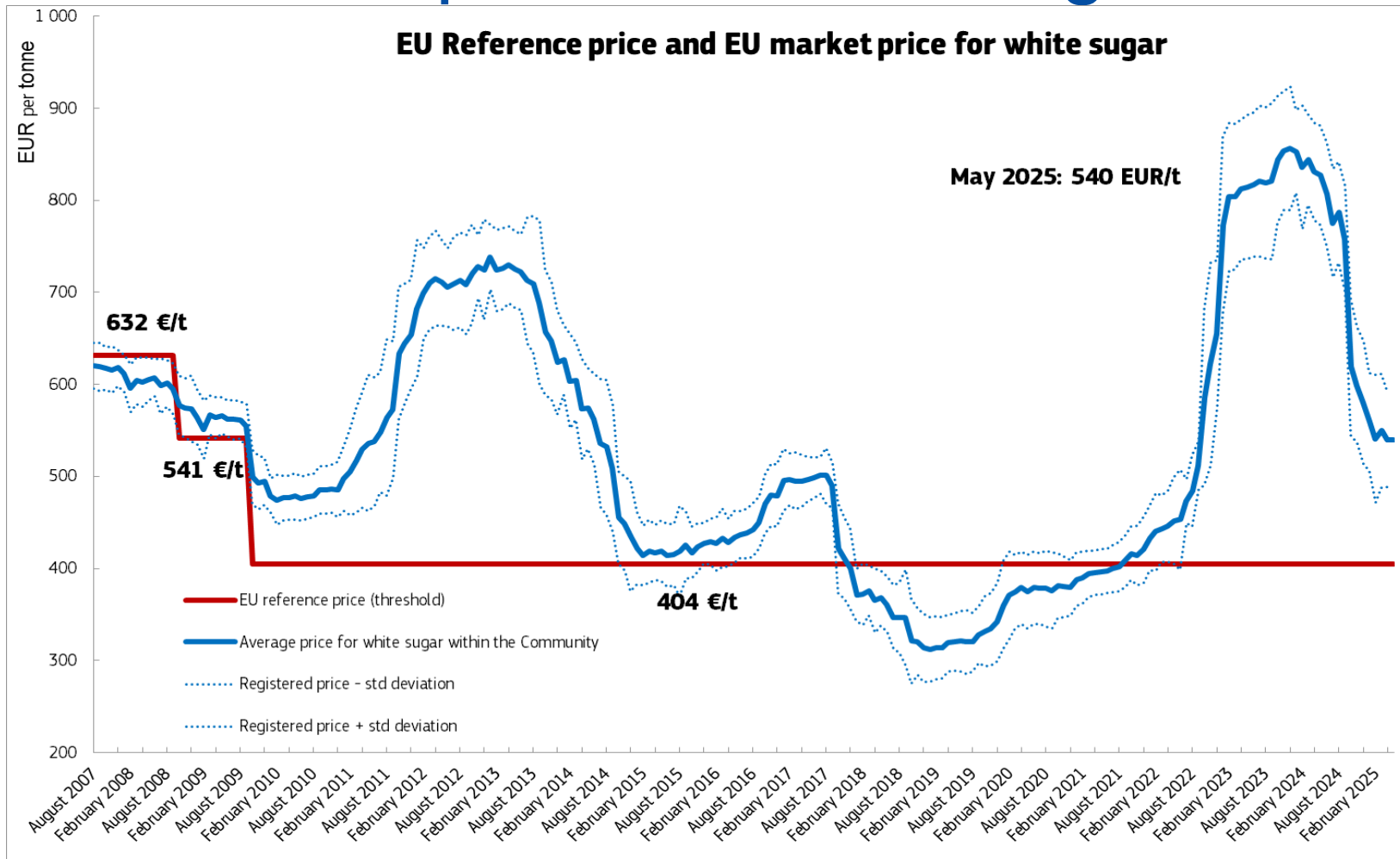


Sugar Price reporting

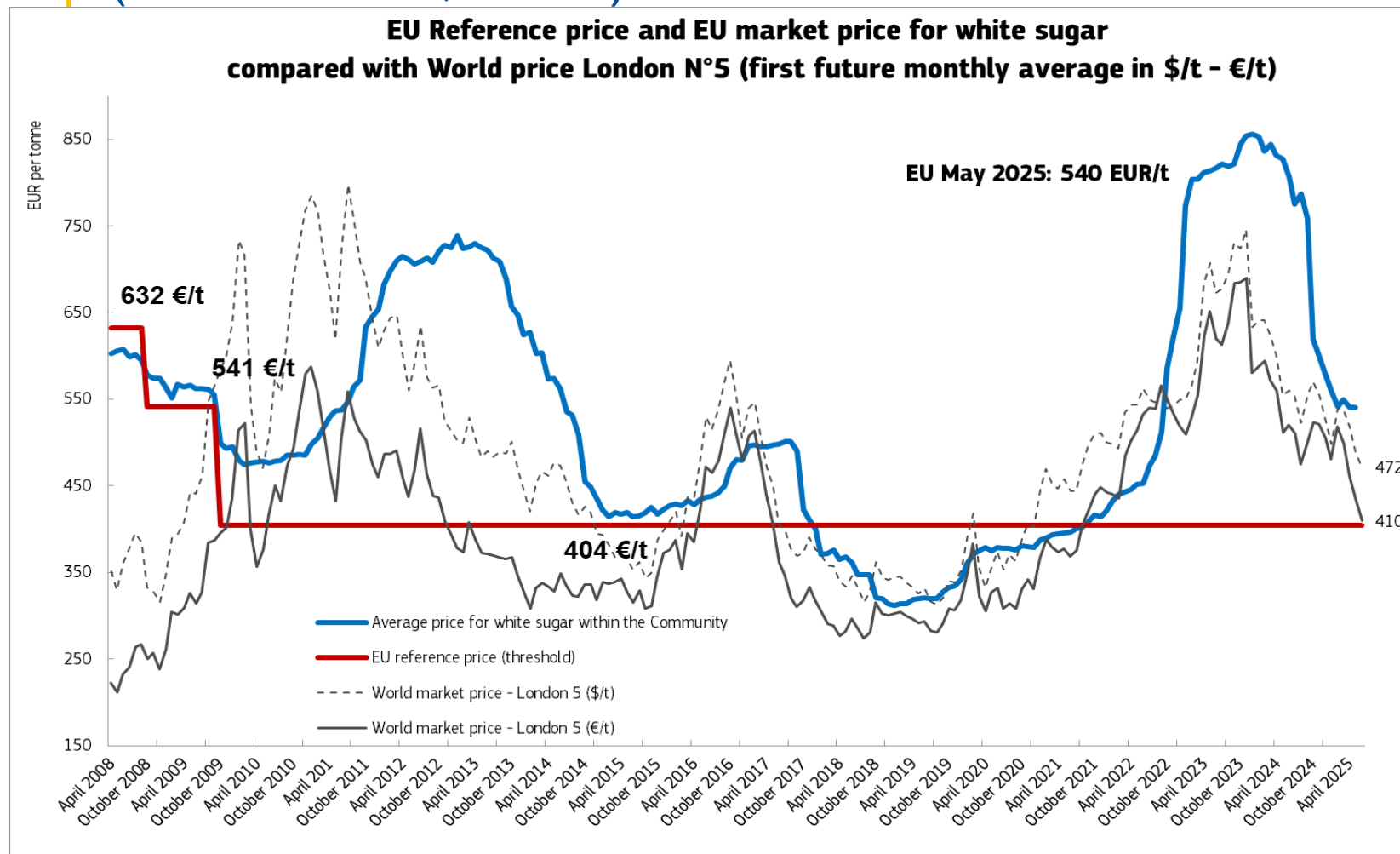
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EU market price for white sugar



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



London N°5 (Jun.2025):

- - EUR 25 per tonne compared to previous month (-5.7%).
- - EUR 111 per tonne compared to Jun. 2024(-21%)

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

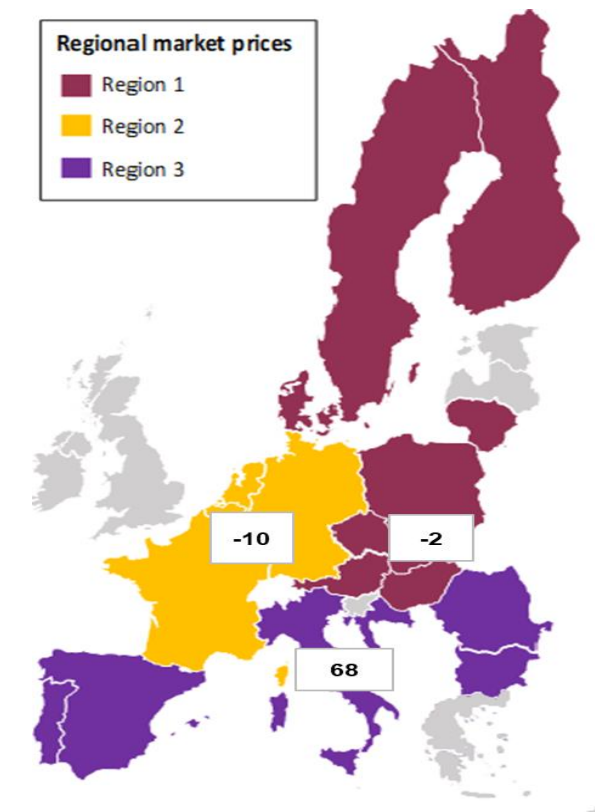
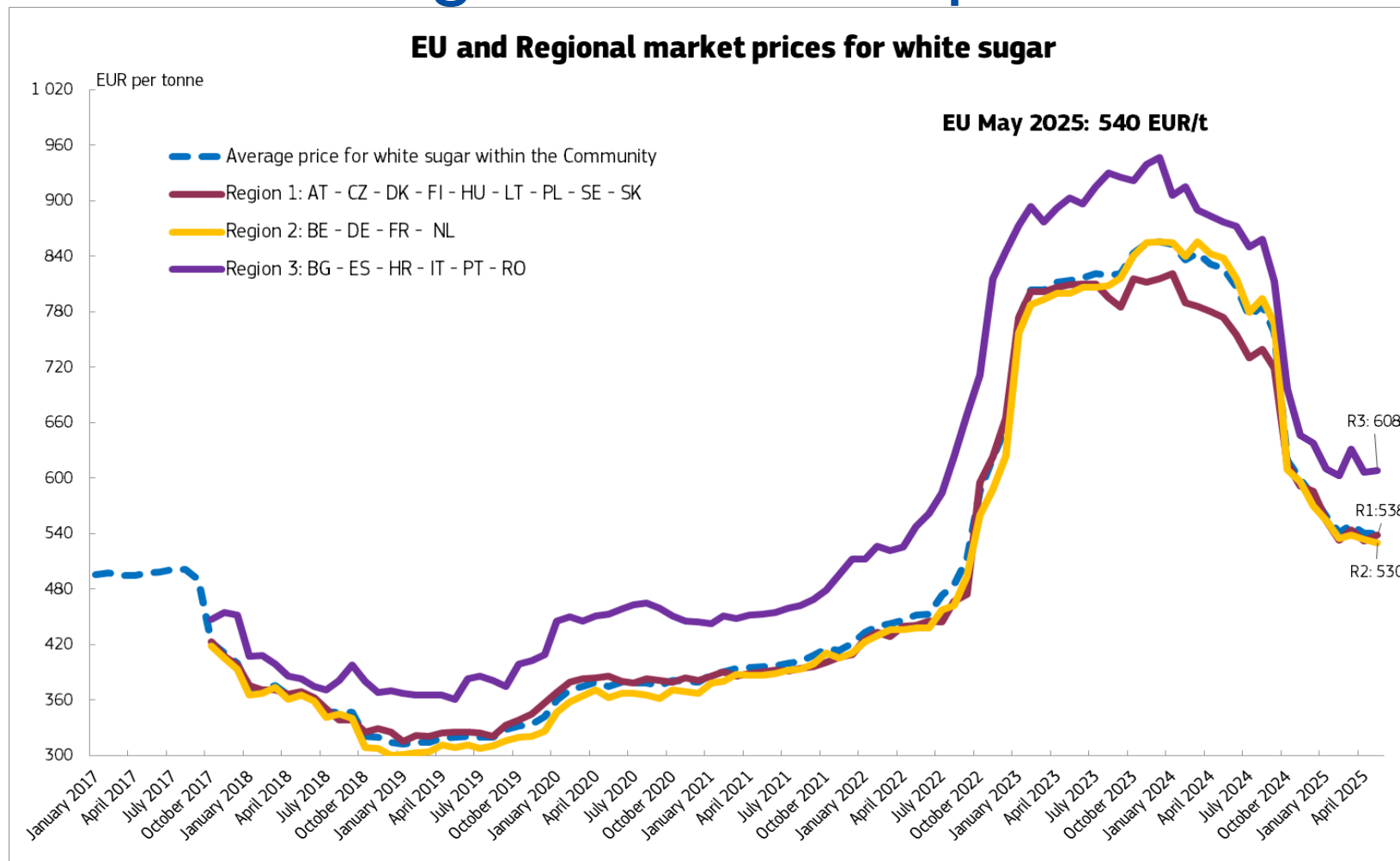
Region 2: BE - DE - FR - NL

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)
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
November 2024	599	63	591	596	646
December 2024	580	67	586	570	638
January 2025	559	53	554	554	610
February 2025	541	69	533	535	603
March 2025	550	62	544	538	631
April 2025	540	51	532	534	606
May 2025	540	51	538	530	608

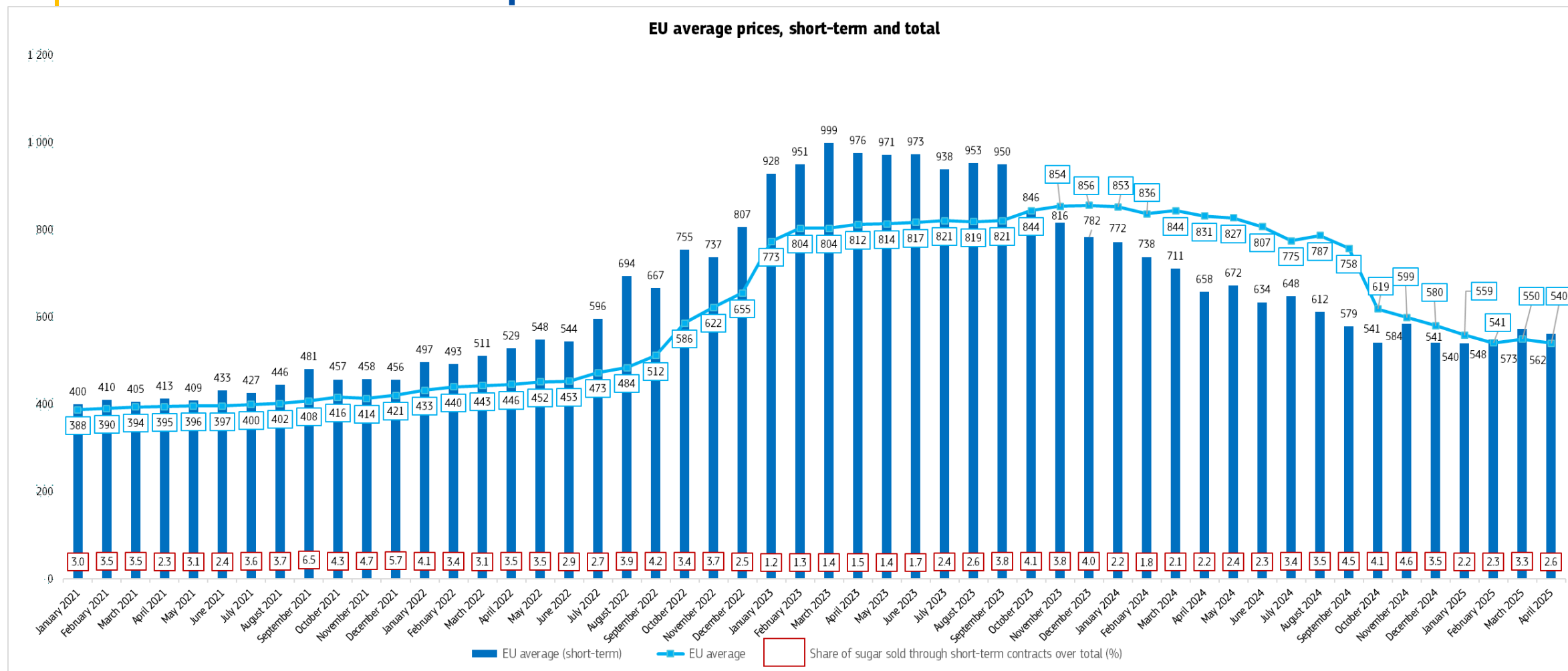
- -287 EUR/tonne compared to previous year

EU and Regional market prices for white sugar



Differences between EU average price and regional average prices

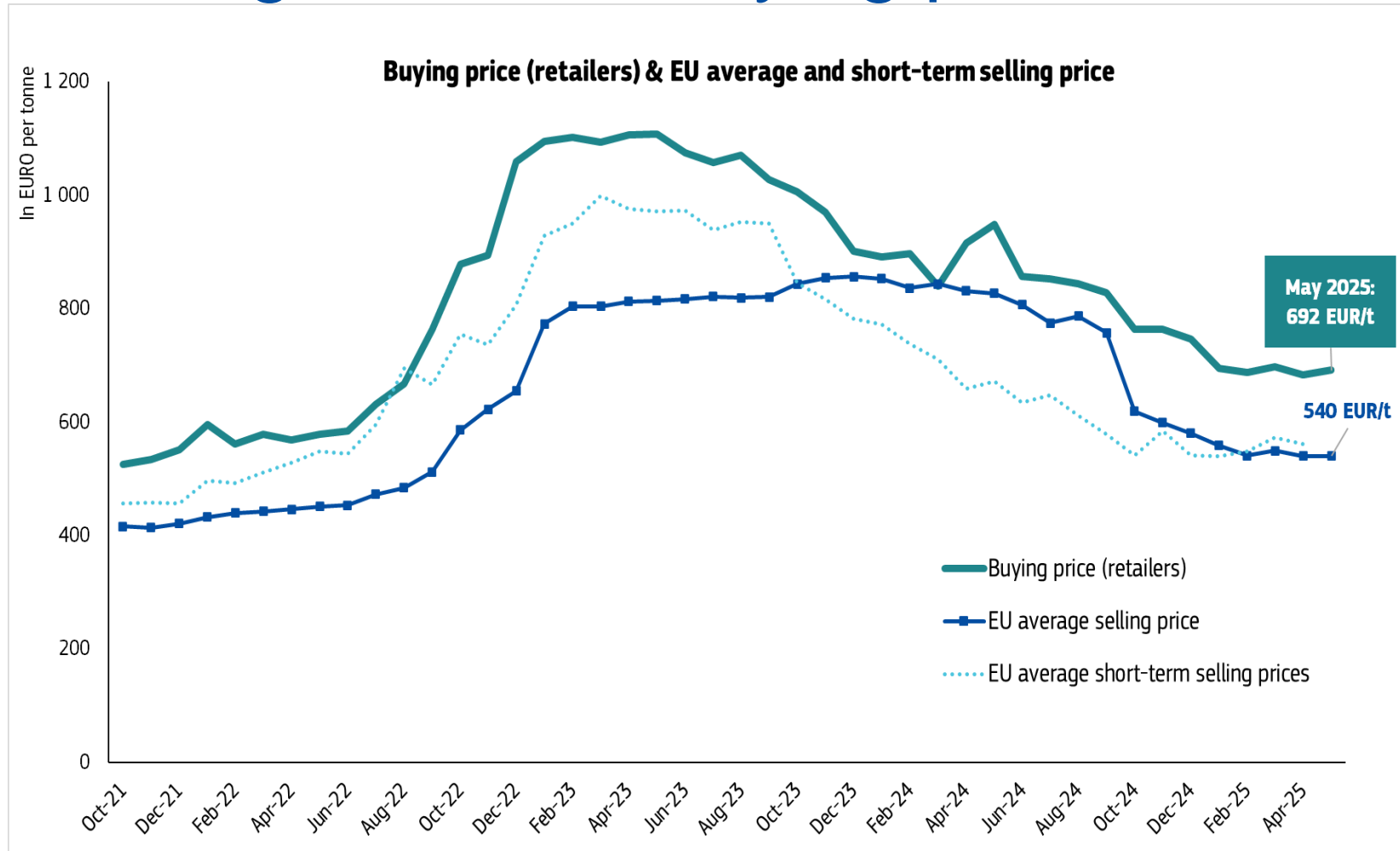
EU short-term prices



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

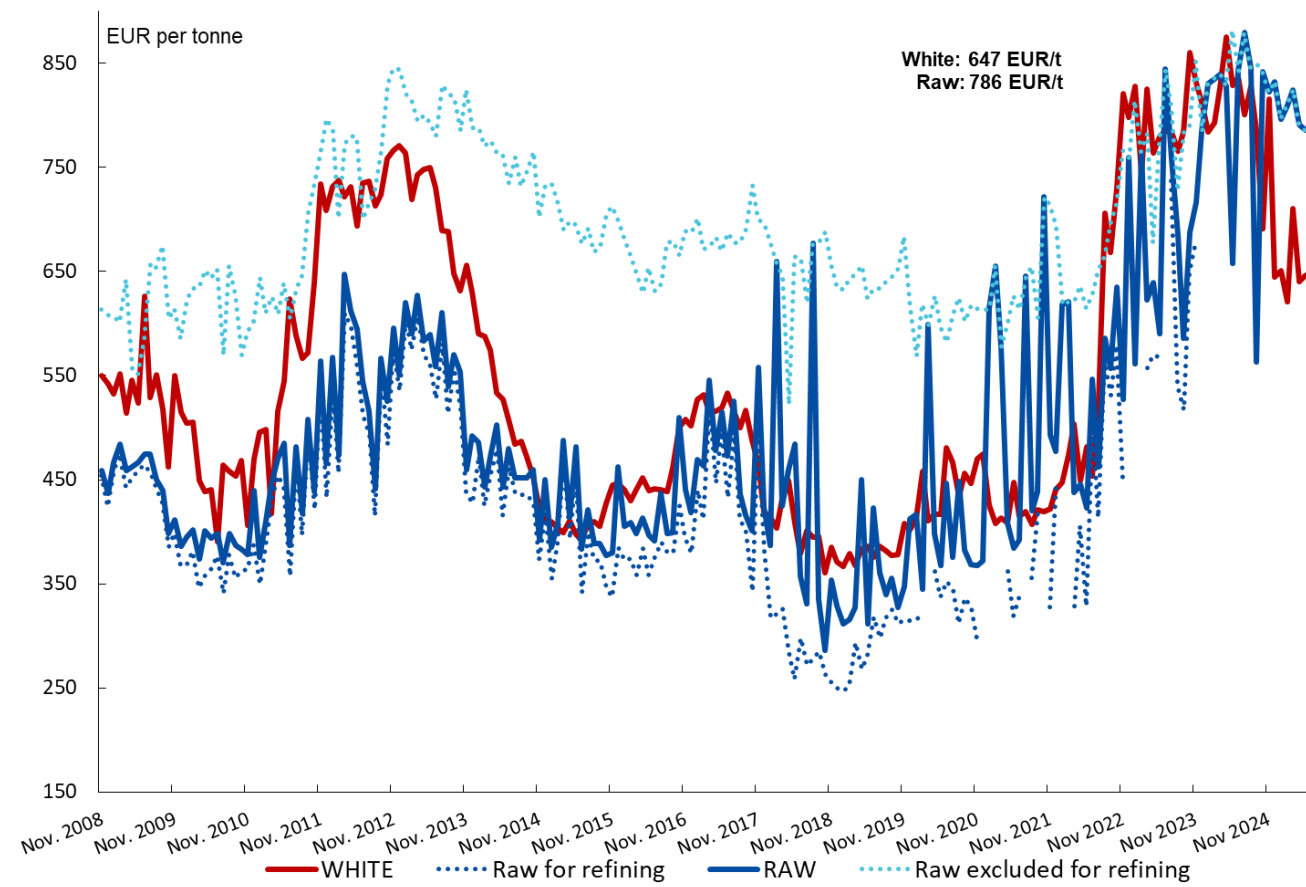
Source: MS notifications

EU sugar retailer buying prices



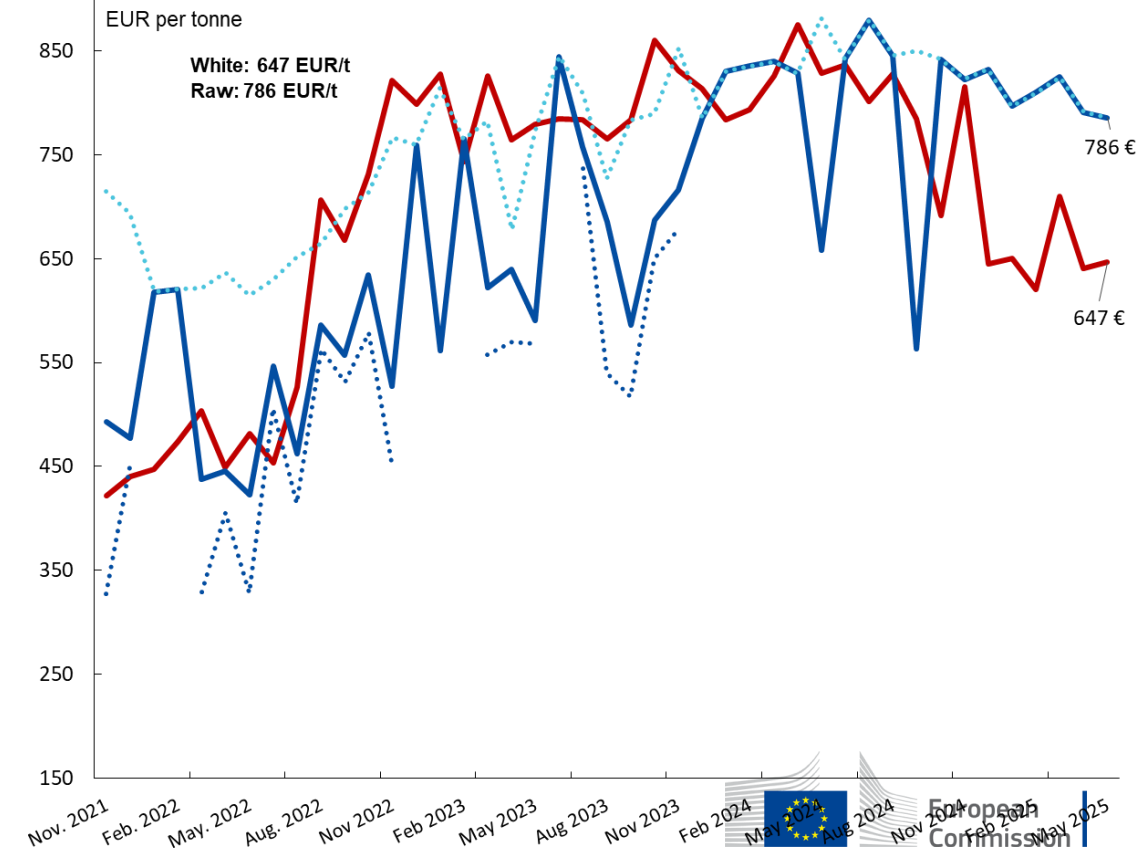
EPA / EBA average import value

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



Source: COMEXT

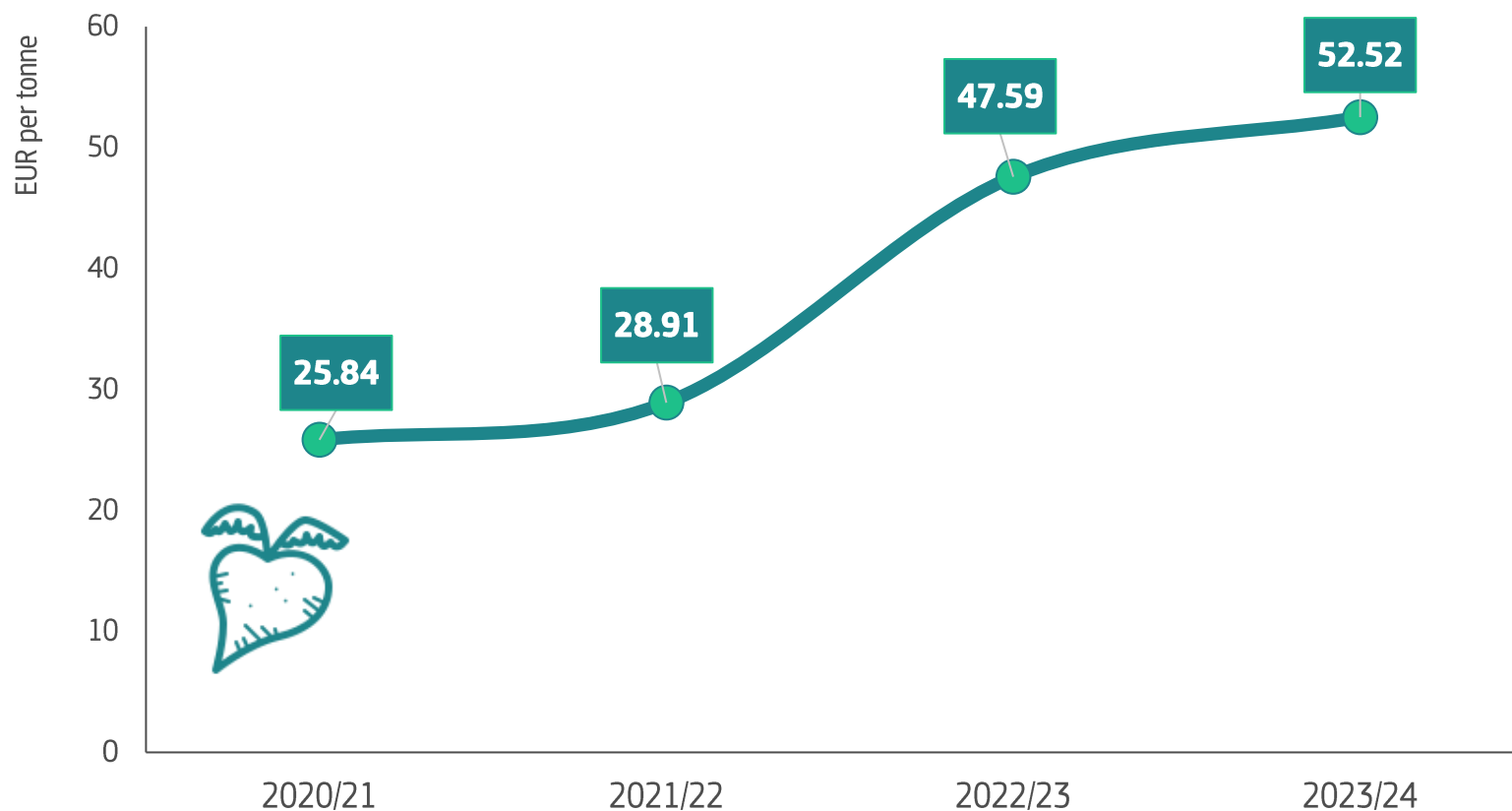
Date	Raw for refining		Raw excluded for refining	
	(EUR/tonne)	tonnes	(EUR/tonne)	tonnes
Jan 2025	- €	0	796 €	9,201
Feb 2025	- €	0	810 €	7,464
Mar 2025	- €	0	825 €	6,051
Apr 2025	- €	0	791 €	12,903
May 2025	- €	0	786 €	12,978



Sugar Beet Price

Average price* for sugar beet

EU sugar beet price



Preliminary
data

NOTE: R 2017/1185 Art 12 (a) - Annex II 1.

*weighted average price

About preliminary data: for marketing year 2023/24, one notification from a MS is missing.

Source: MS notifications

Average price for sugar beet

METHODOLOGY FOR THE ESTABLISHMENT OF SUGAR BEET PRICES

- The price shall be notified as follows:
 - one weighted average price per marketing year;
 - in national currency, per tonne;
 - taking account of all of the quantities purchased by sugar beet processors from beet growers in respect of the marketing year for which the price is notified;
 - converted to 16% equivalent sugar content.
- The total corresponding quantity of sugar beet shall be notified in tonnes.

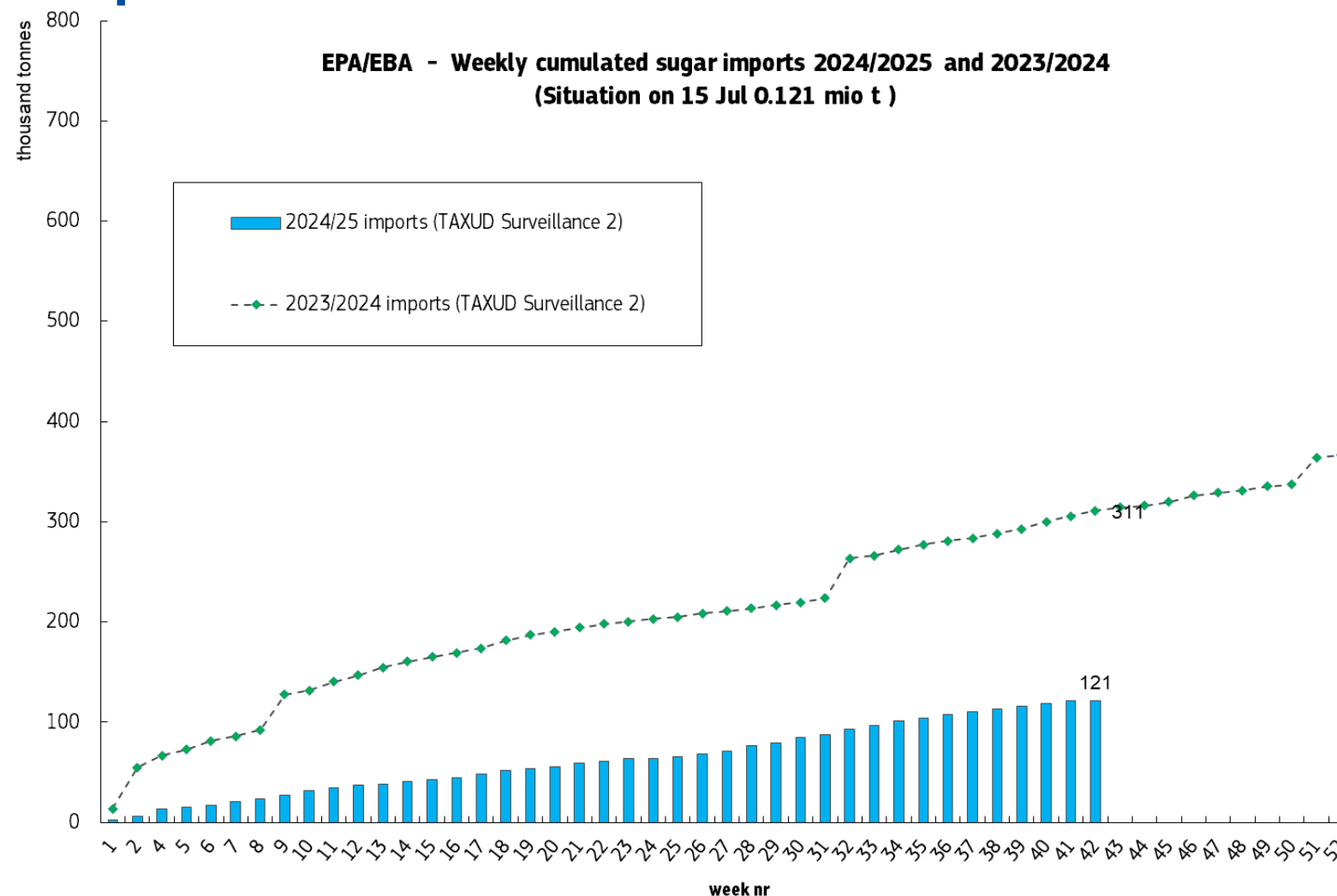


Sugar Trade statistics

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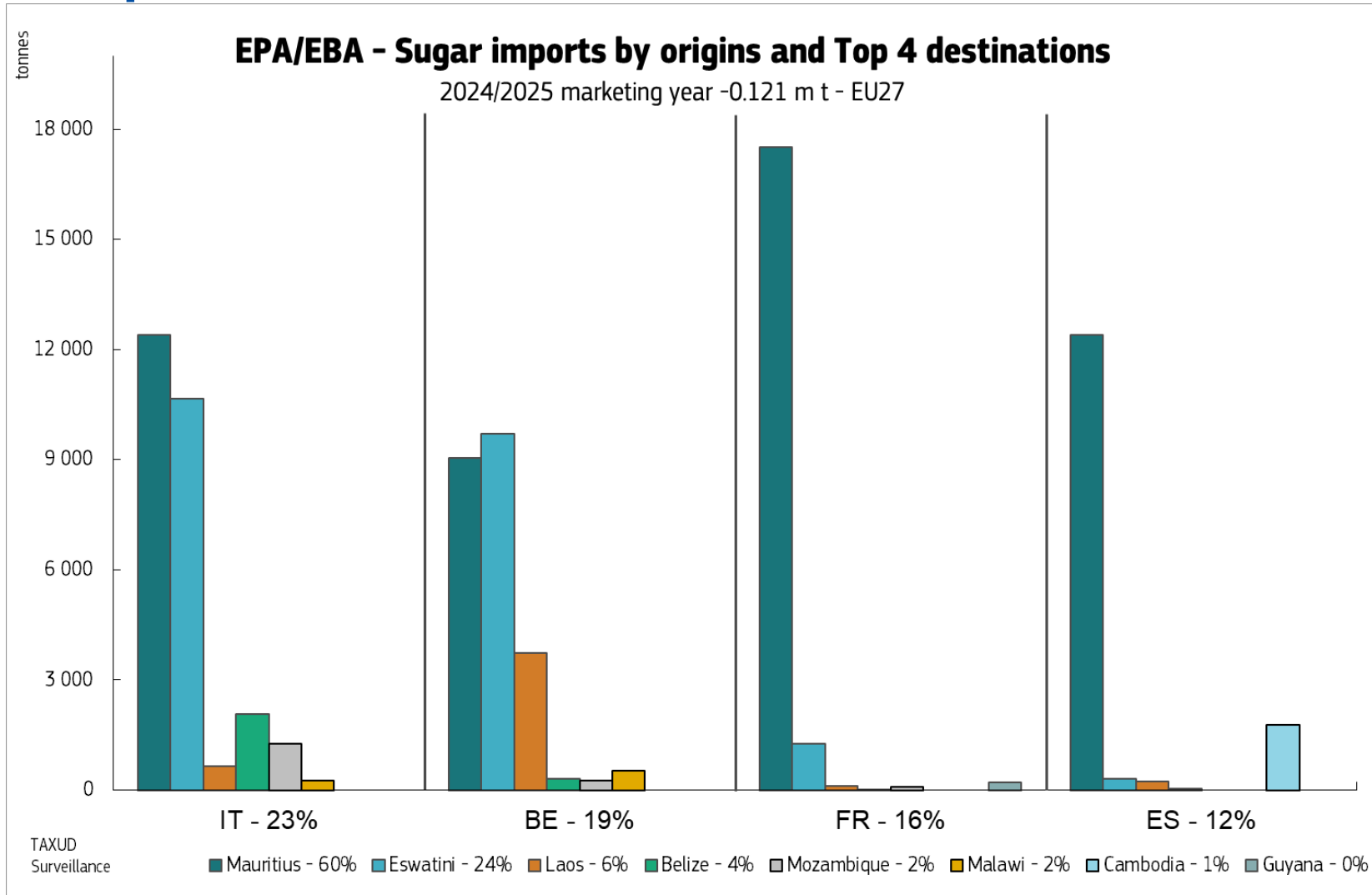
24 July 2025

Imports EPA / EBA in 2024/2025

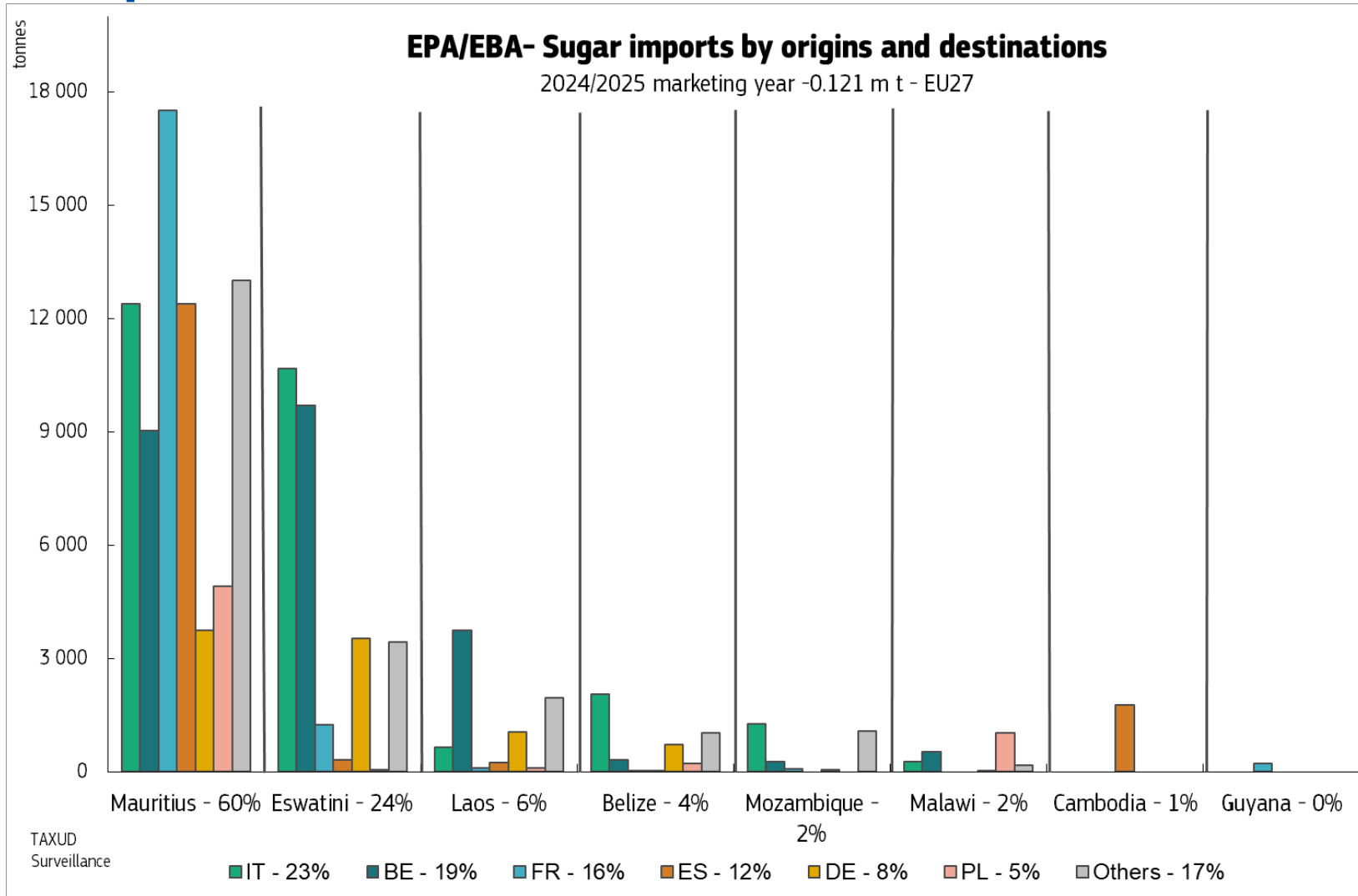


Source: DG TAXUD

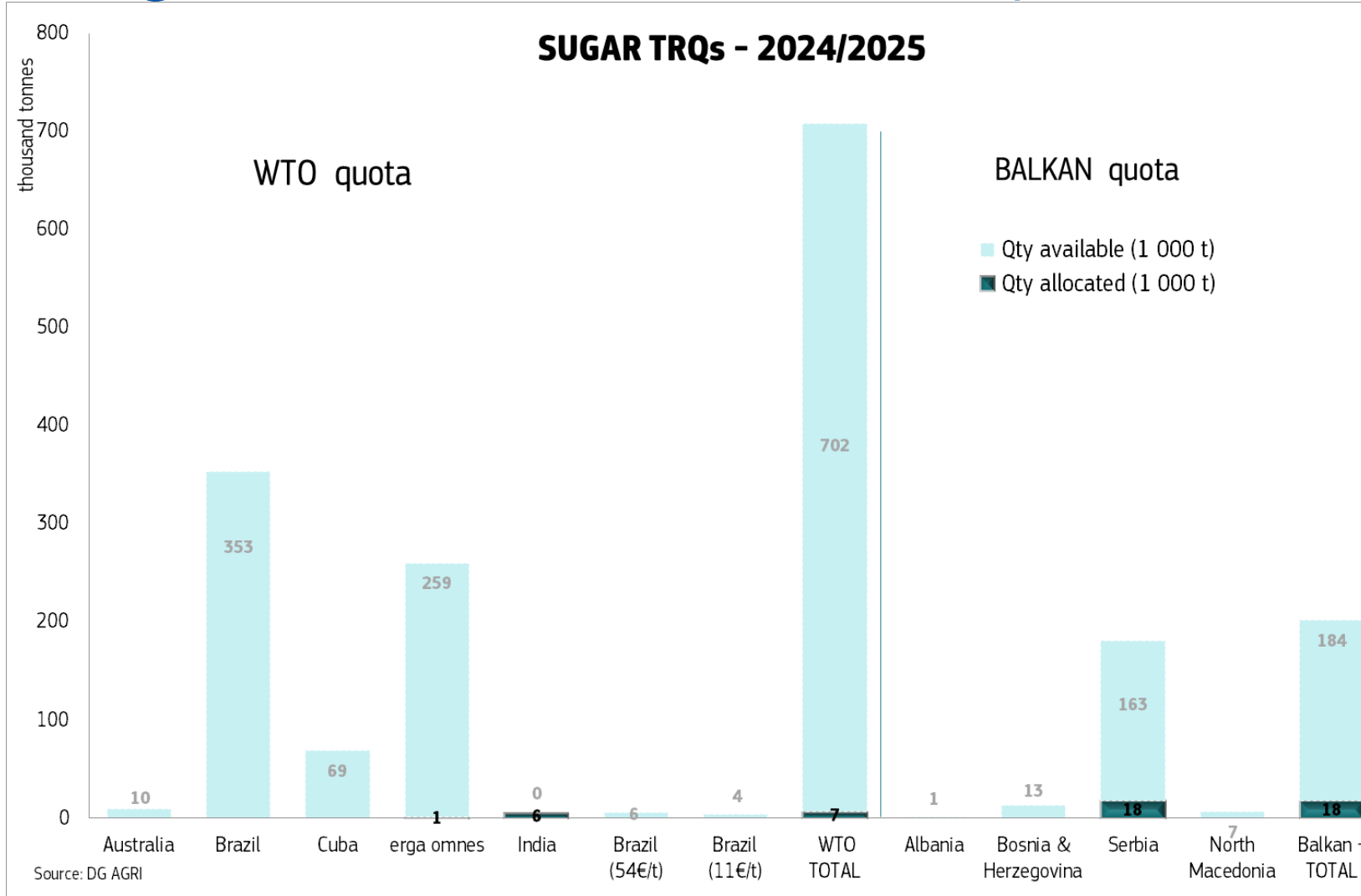
Imports EPA / EBA in 2024/2025



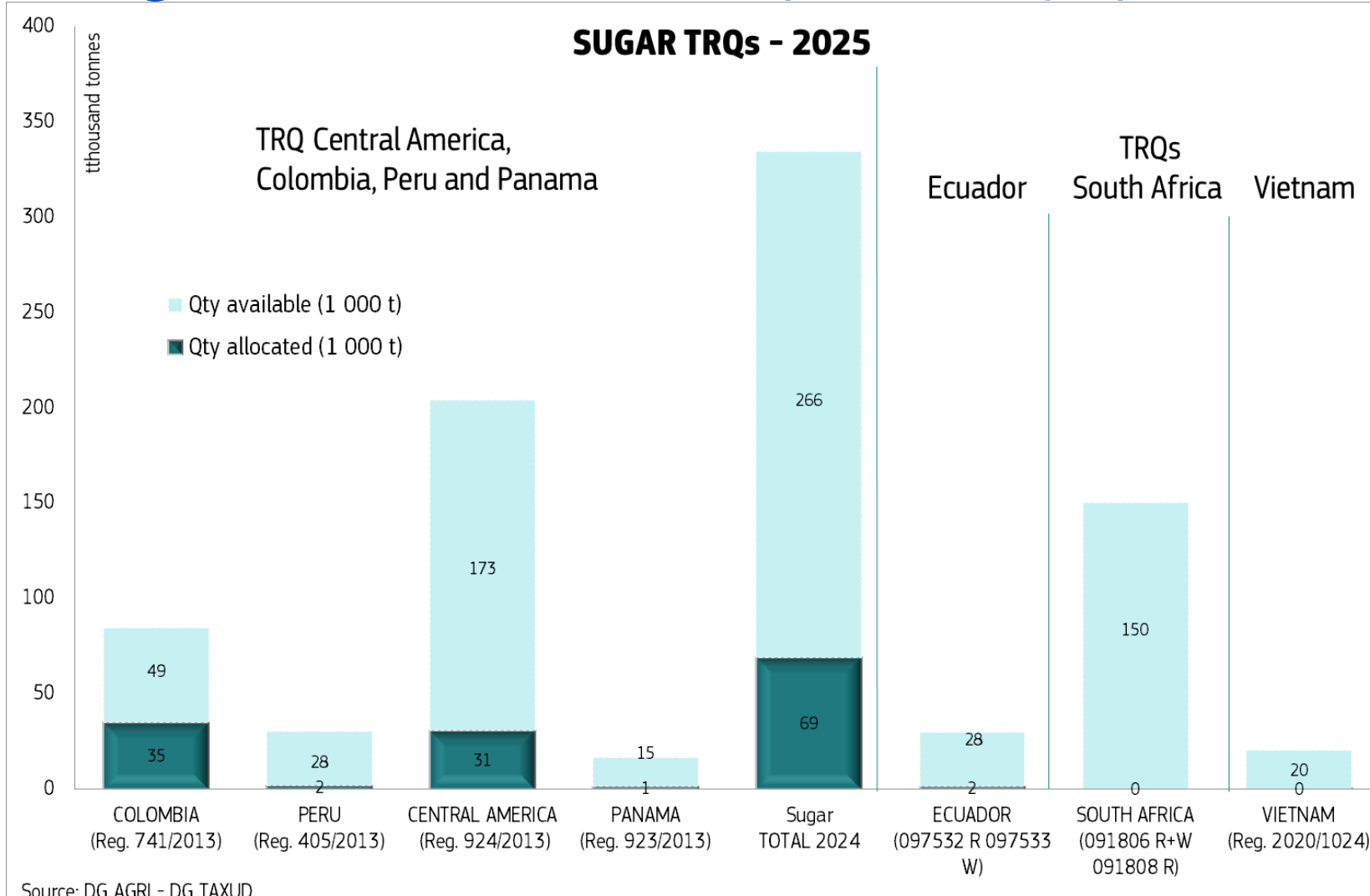
Imports EPA / EBA in 2024/2025



Sugar TRQs 2024-2025 (22/07/2025)



Sugar TRQs 2025 (EU 27) (22/07/2025)

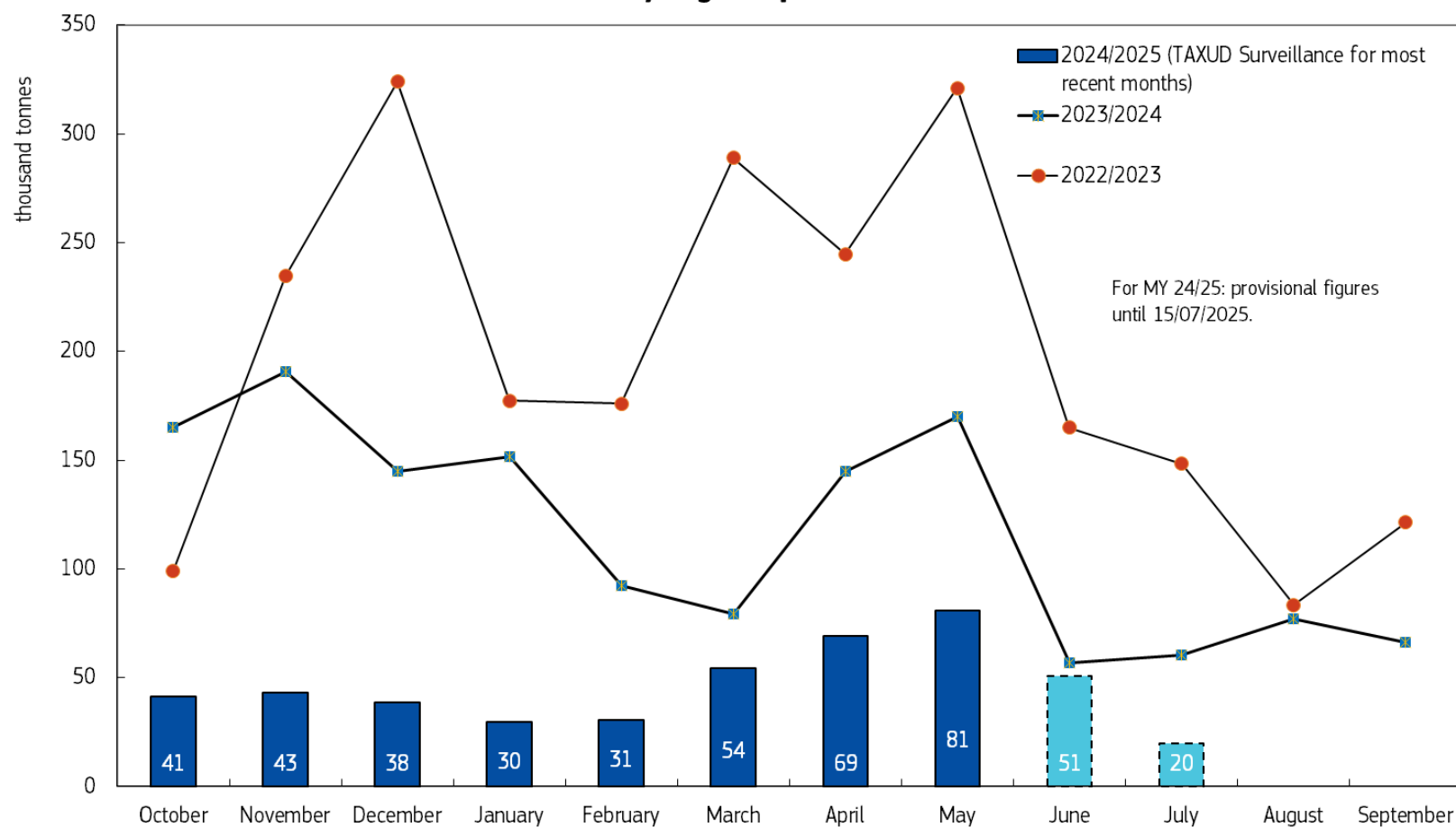


EU Total Sugar Trade Flows

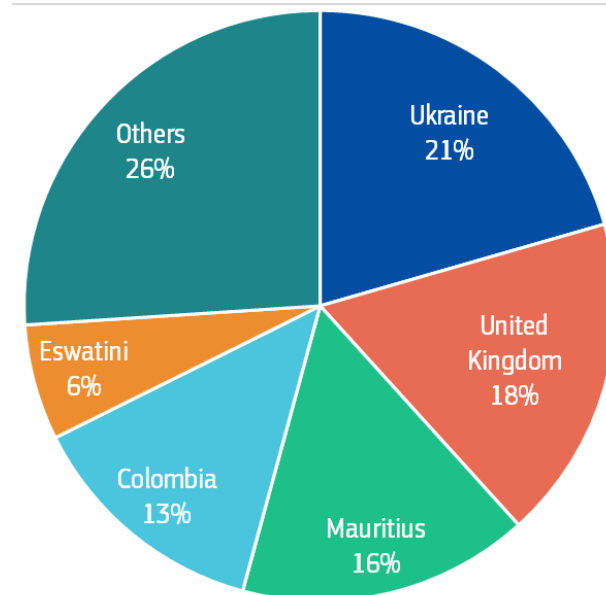
EU Sugar Imports

EU Total imports

EU Monthly sugar imports (CN 1701)

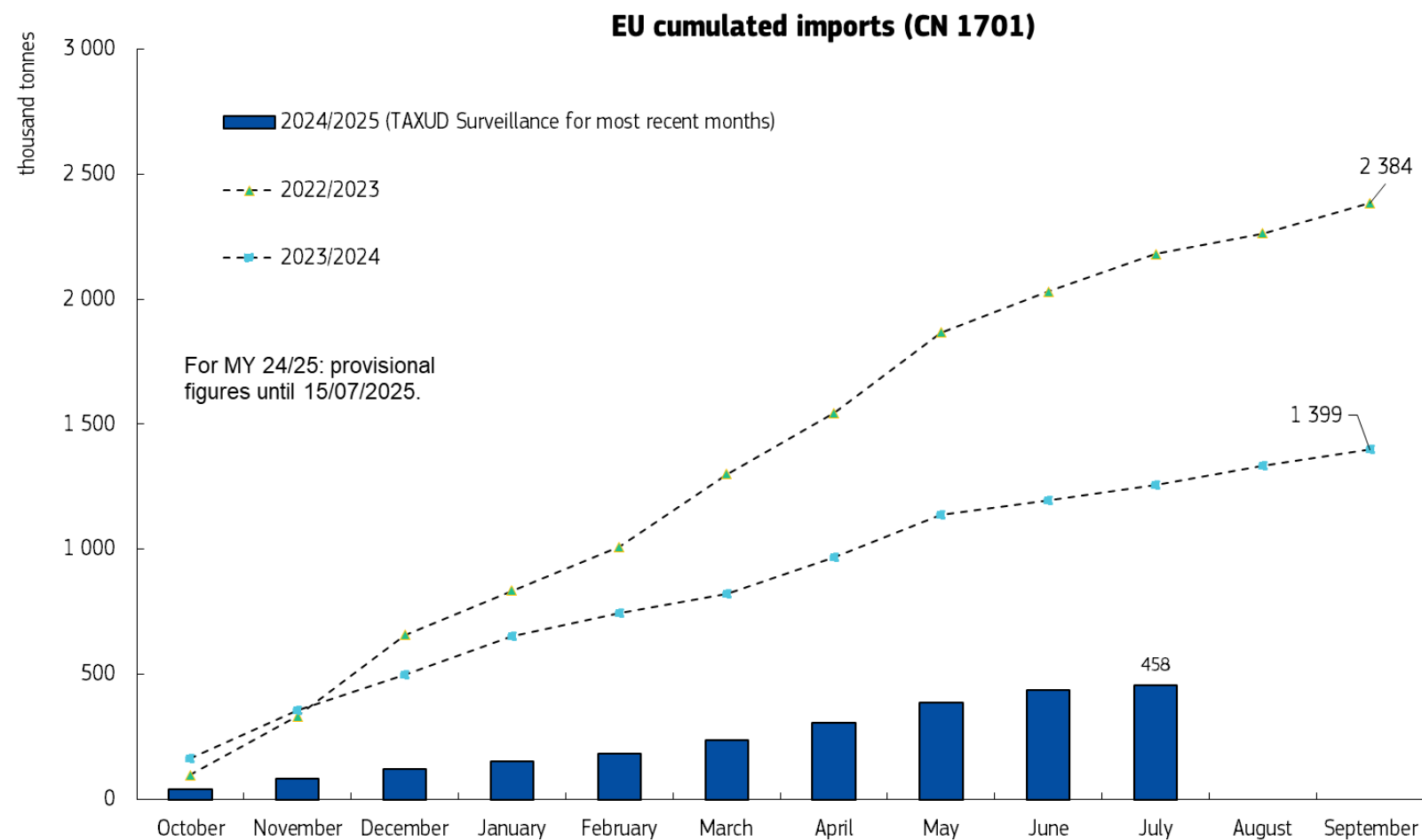


Sources: EUROSTAT - DG TAXUD



EU imports by main origins in Marketing Year
2024/25
(Oct.-Jun)
(COMEXT and TAXUD)

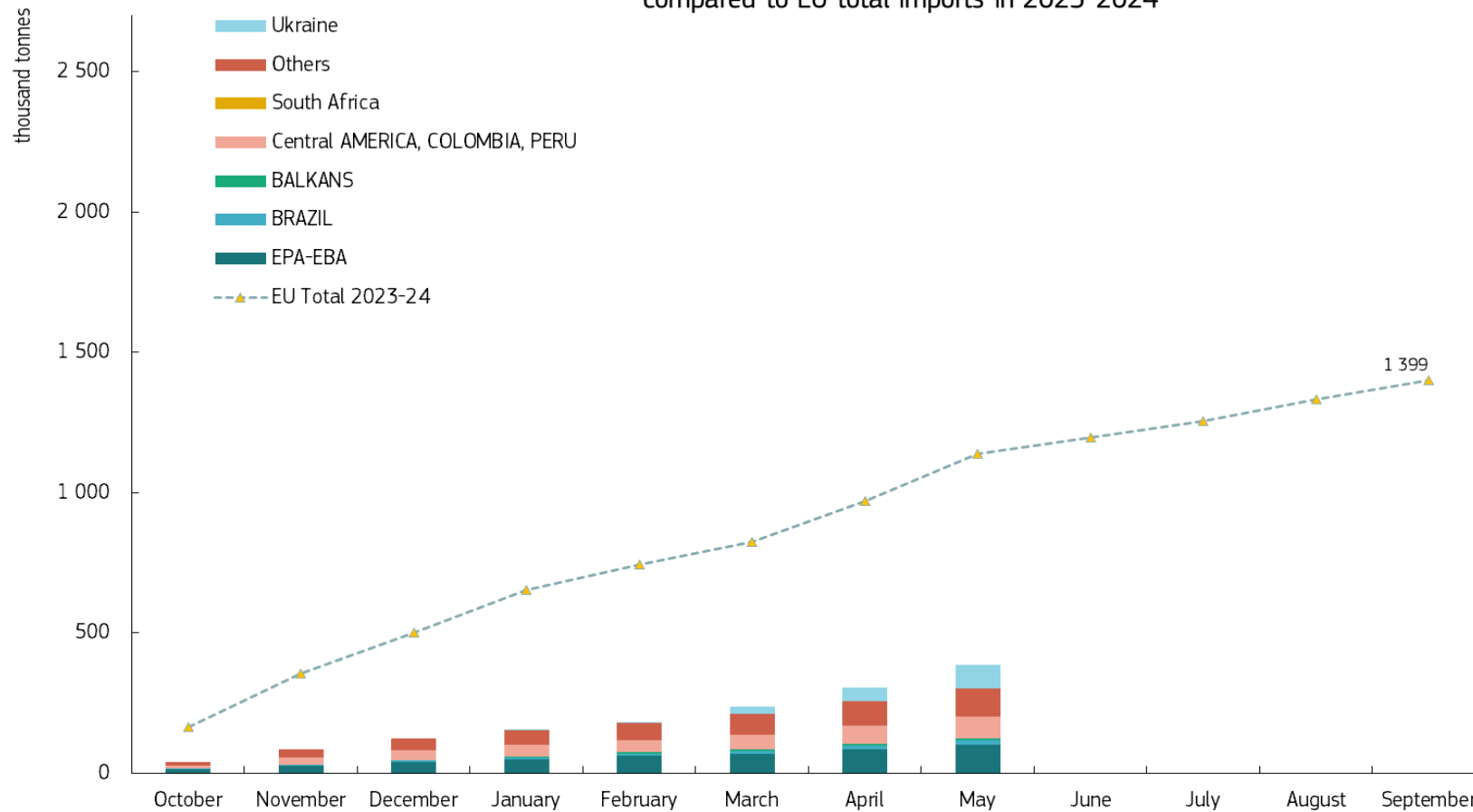
EU Total imports



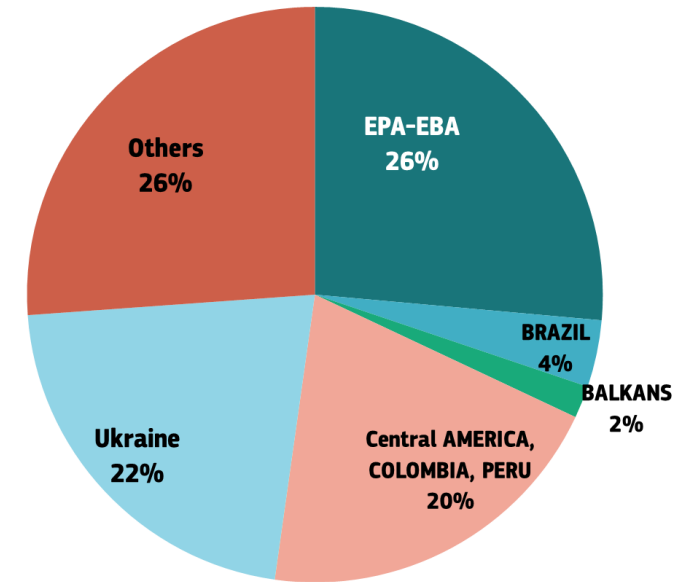
Source: EUROSTAT, Taxud

EU Total imports

EU Sugar main imports origins in 2024-2025
compared to EU total imports in 2023-2024



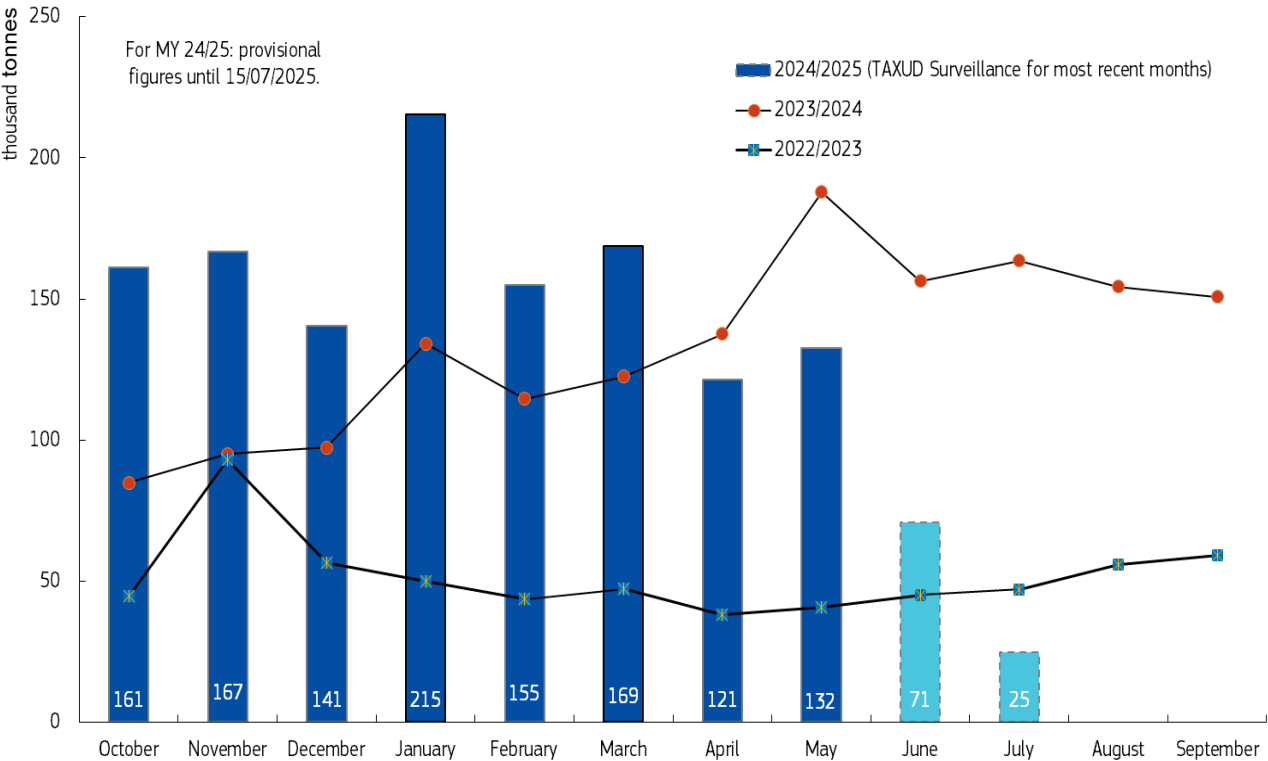
Source: EUROSTAT



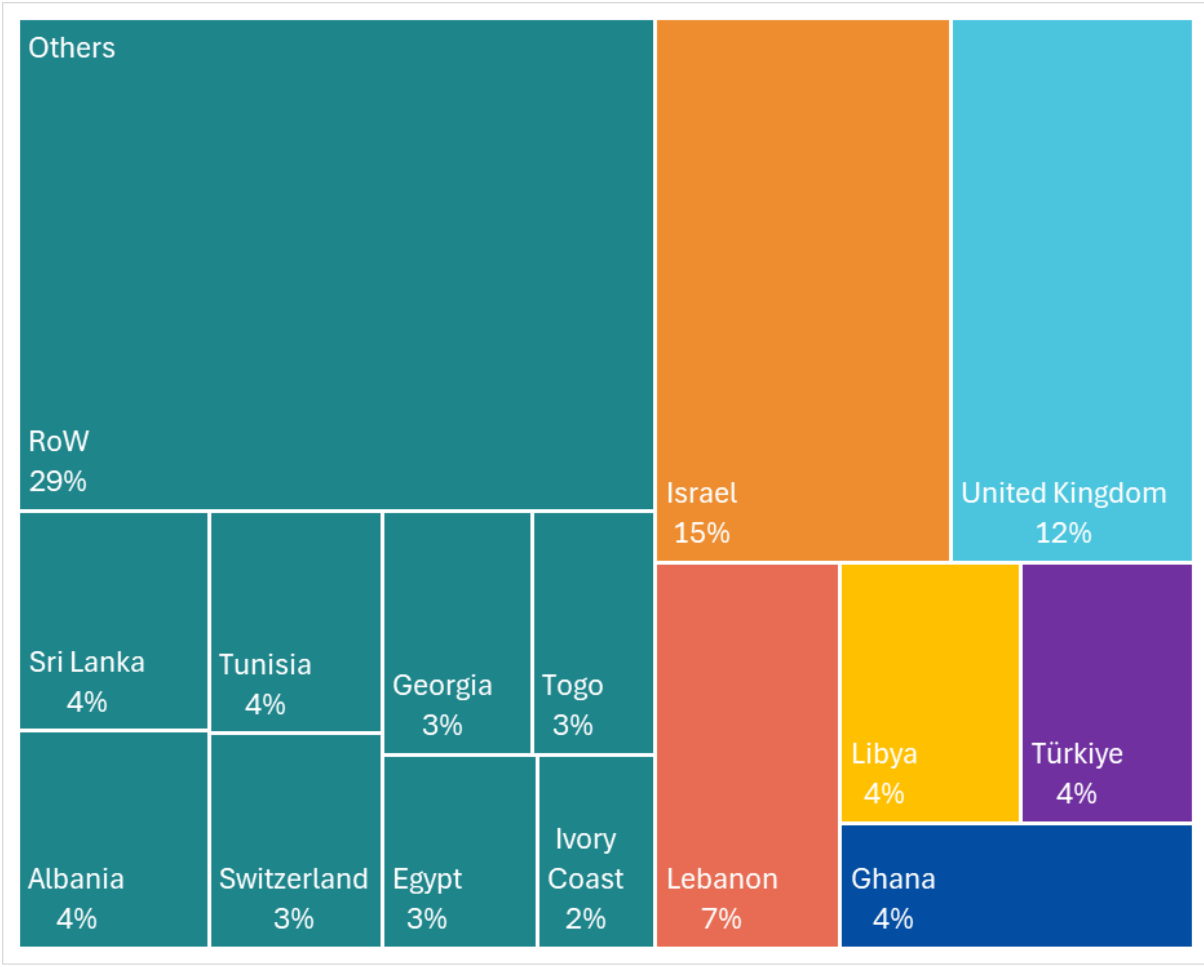
EU Sugar Exports

EU Total exports

EU Monthly sugar exports (CN 1701)

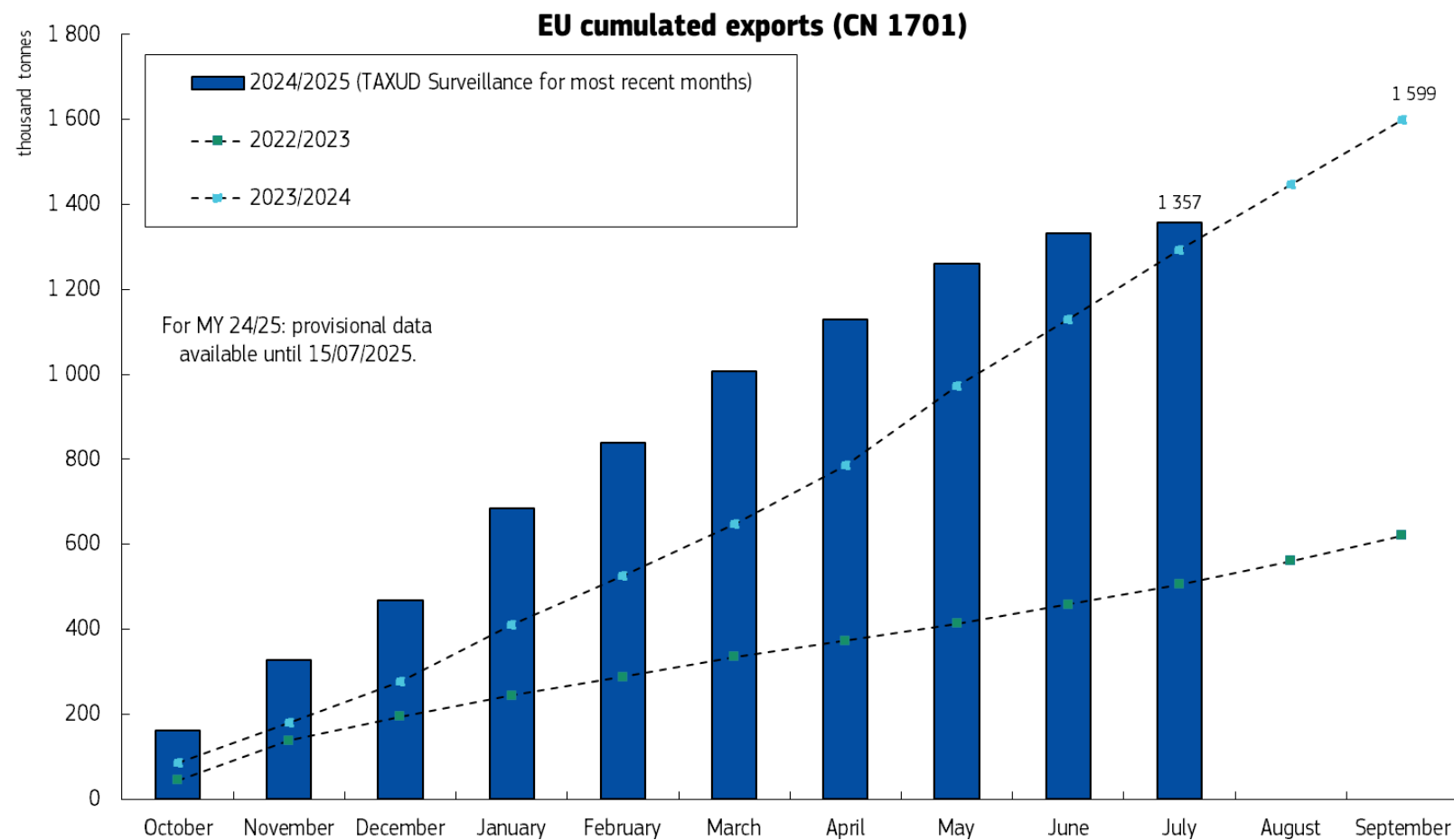


Source: EUROSTAT - DG TAXUD



EU exports by main origins in Marketing Year 2024/25 (Oct.- Jun)
(COMEXT and TAXUD)

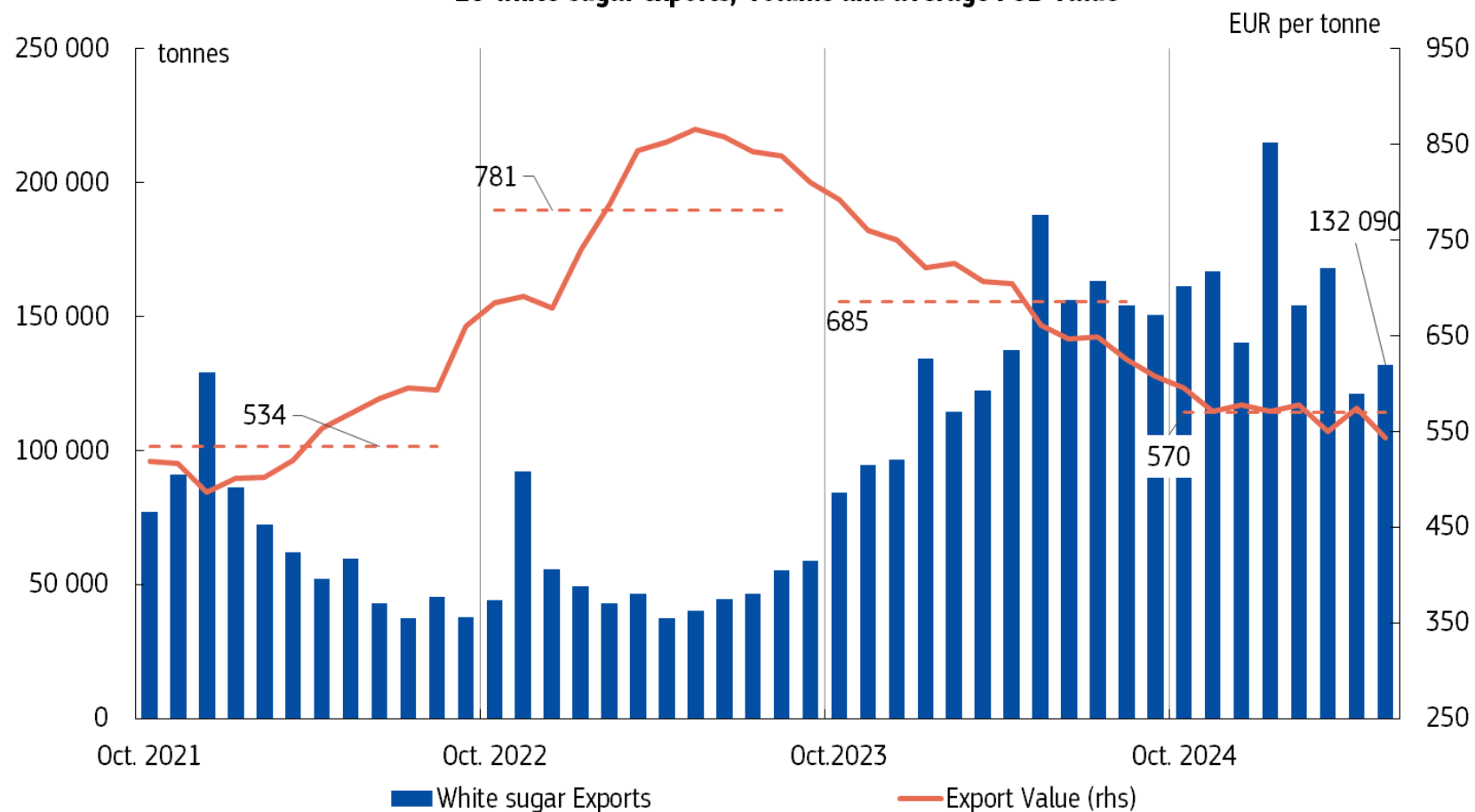
EU Total exports



Source: EUROSTAT- DG TAXUD

EU White sugar exports

EU white sugar exports, volume and average FOB value





Source: EUROSTAT.

Focus on Ukraine

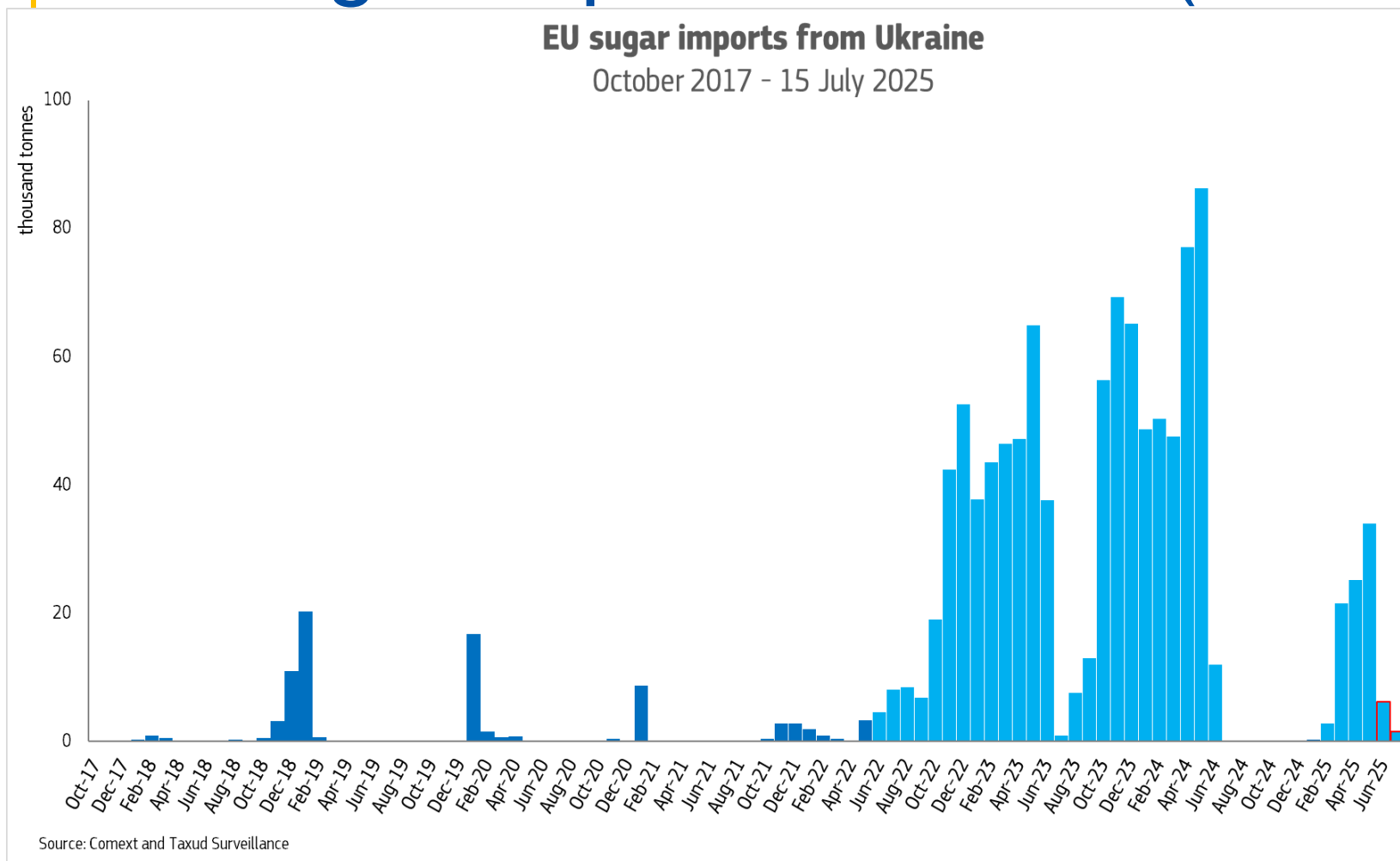
MY 2024/25

Update -sugar beet in Ukraine

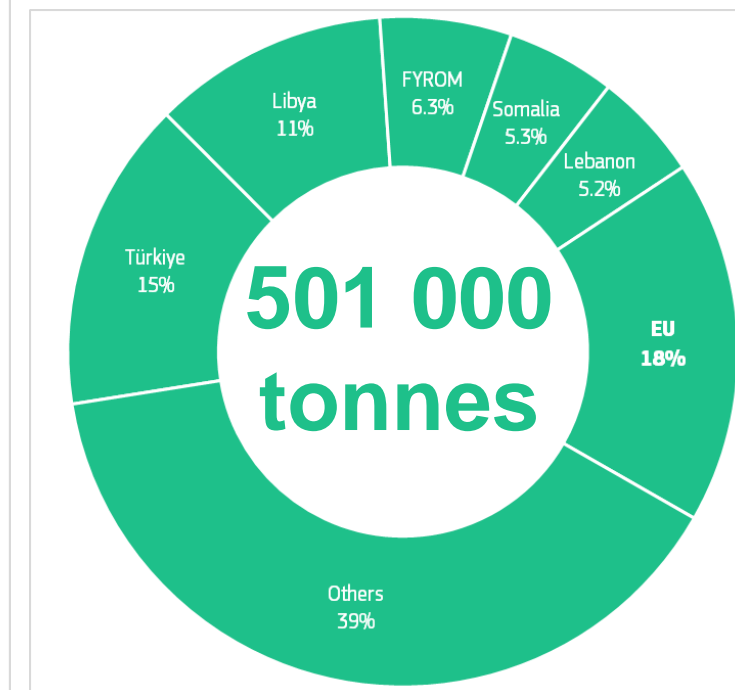
	2023/24	2024/25	2025/26
	250 000 ha	253 400 ha	217 100 ha
	11.8 million tonnes	12.09 million tonnes	

Source: European Union Delegation to Ukraine. Information sent until 12/06/2025

EU sugar imports from UA (CN 1701)



Ukrainian sugar exports (CN 1701)

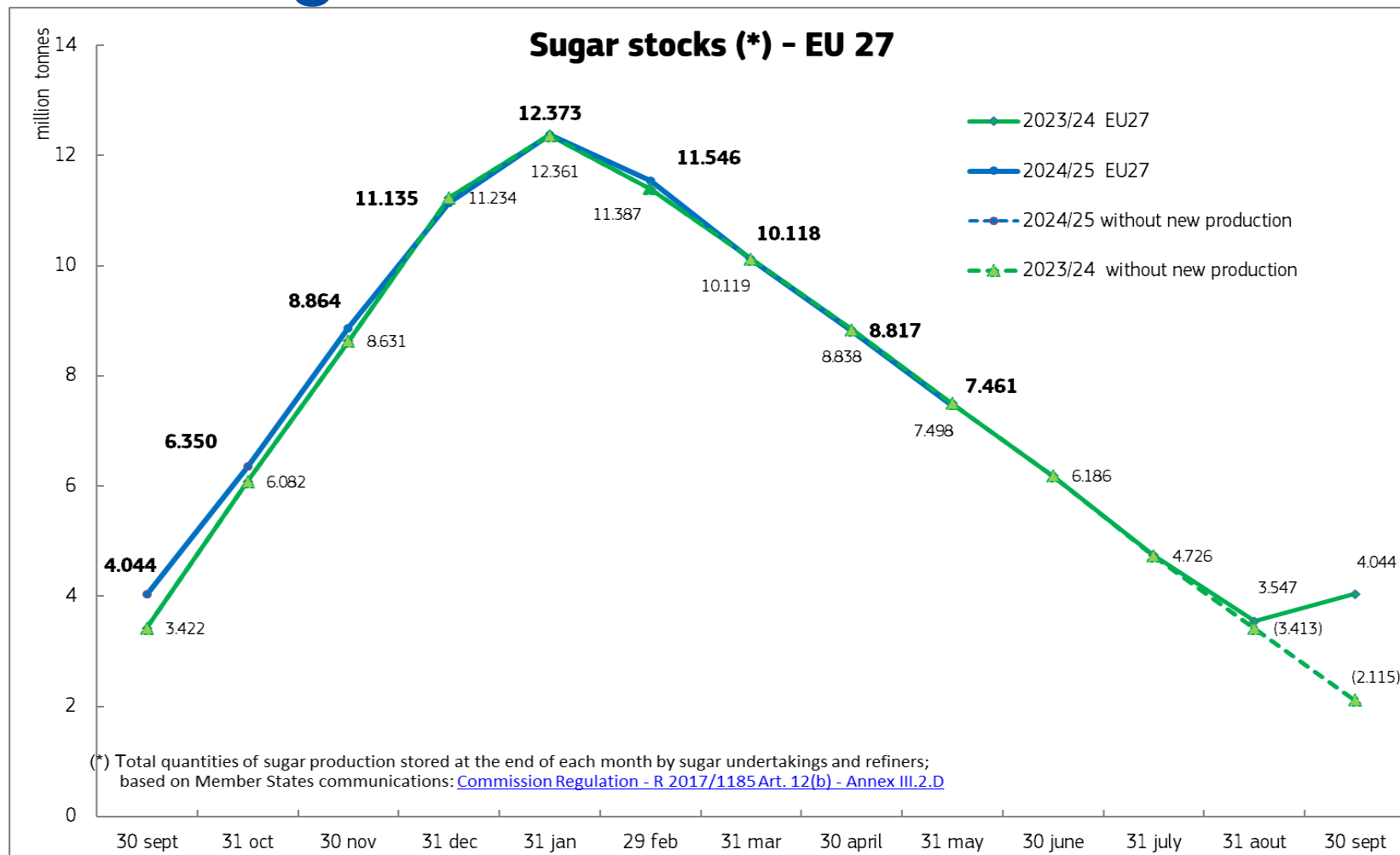


Top-destinations for
Ukrainian sugar exports
(Oct.-Jun. MY 2024/25)

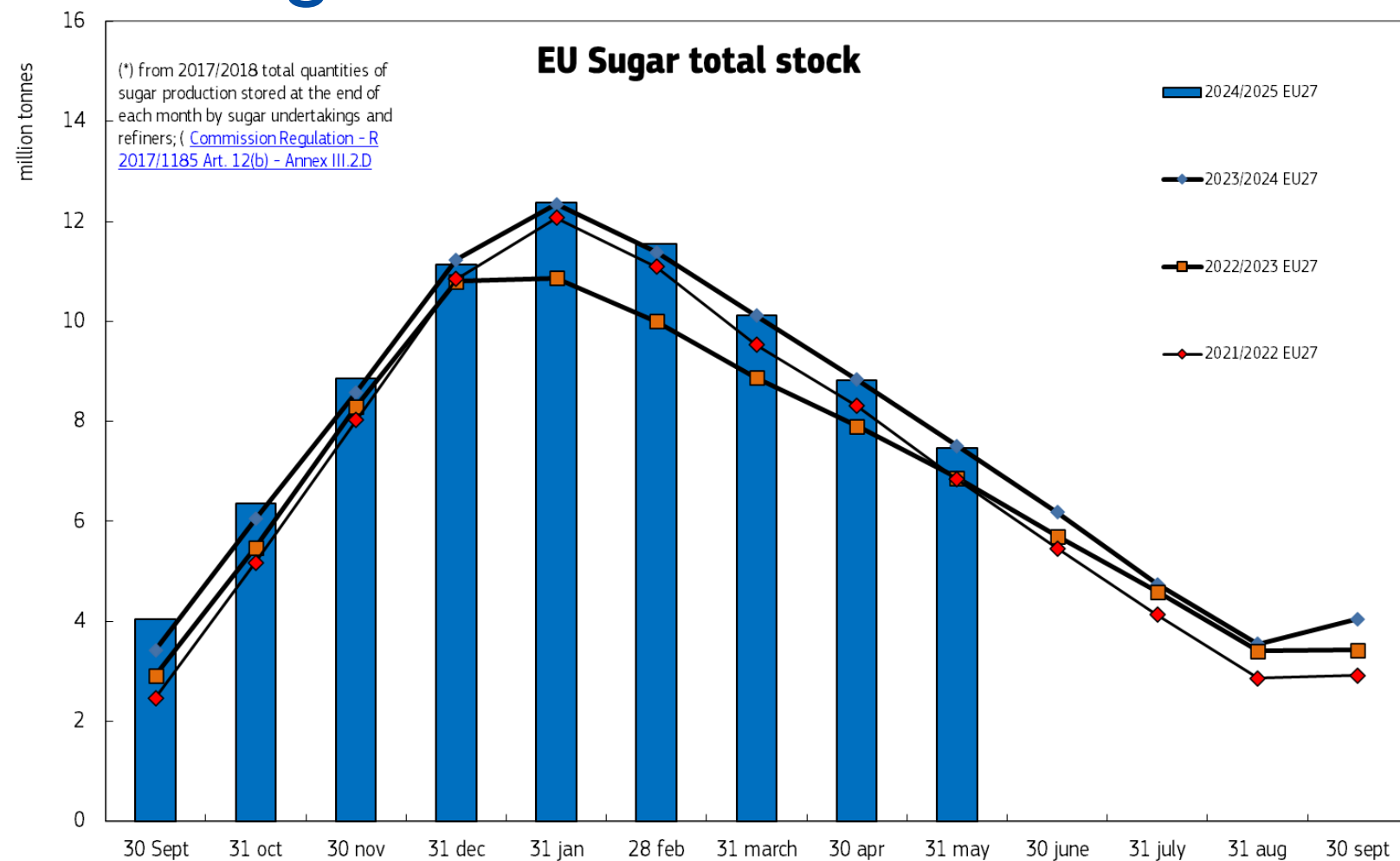
Marketing year: October- September.
Source: ITC, Ukrainian customs.

EU Sugar stocks

EU Sugar stocks



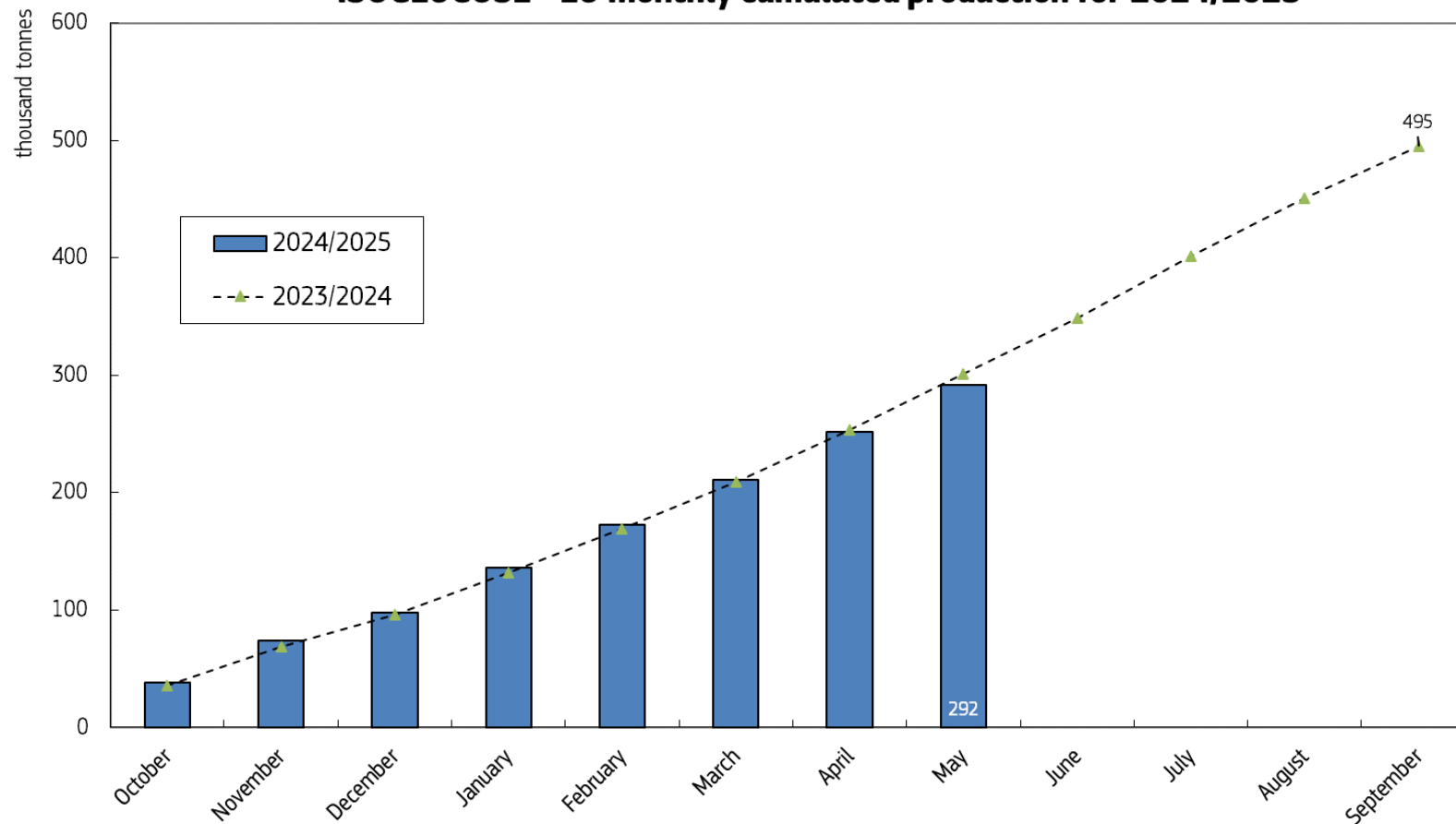
EU Sugar stocks



EU Isoglucose

EU Isoglucose production

ISOGLUCOSE - EU monthly cumulated production for 2024/2025

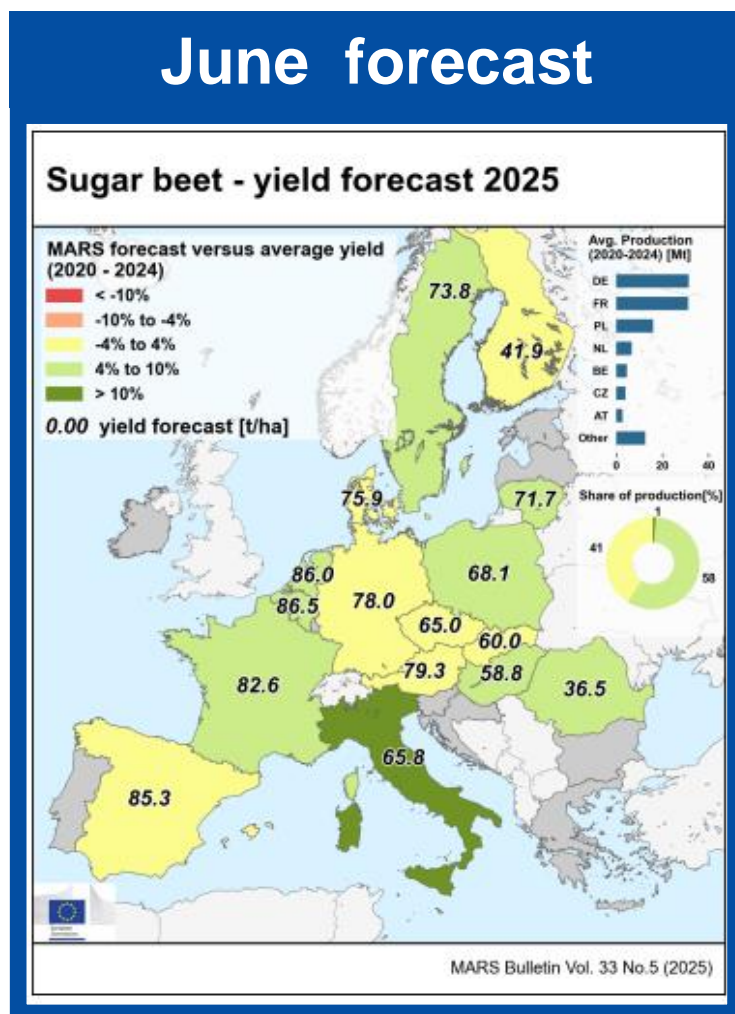


Source: DG AGRI.

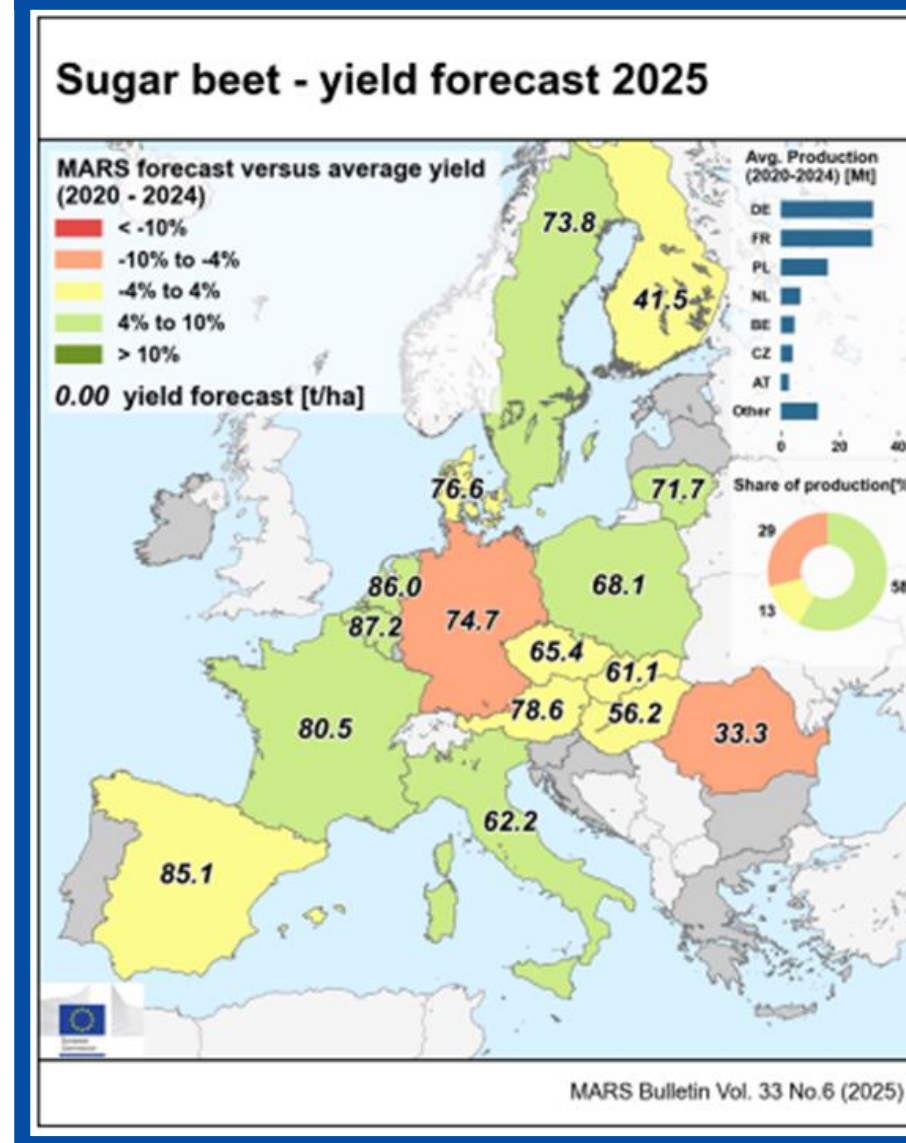
Sugar Beet Yields 2025/26

Sugar beet yields

June forecast



July forecast



Thank you