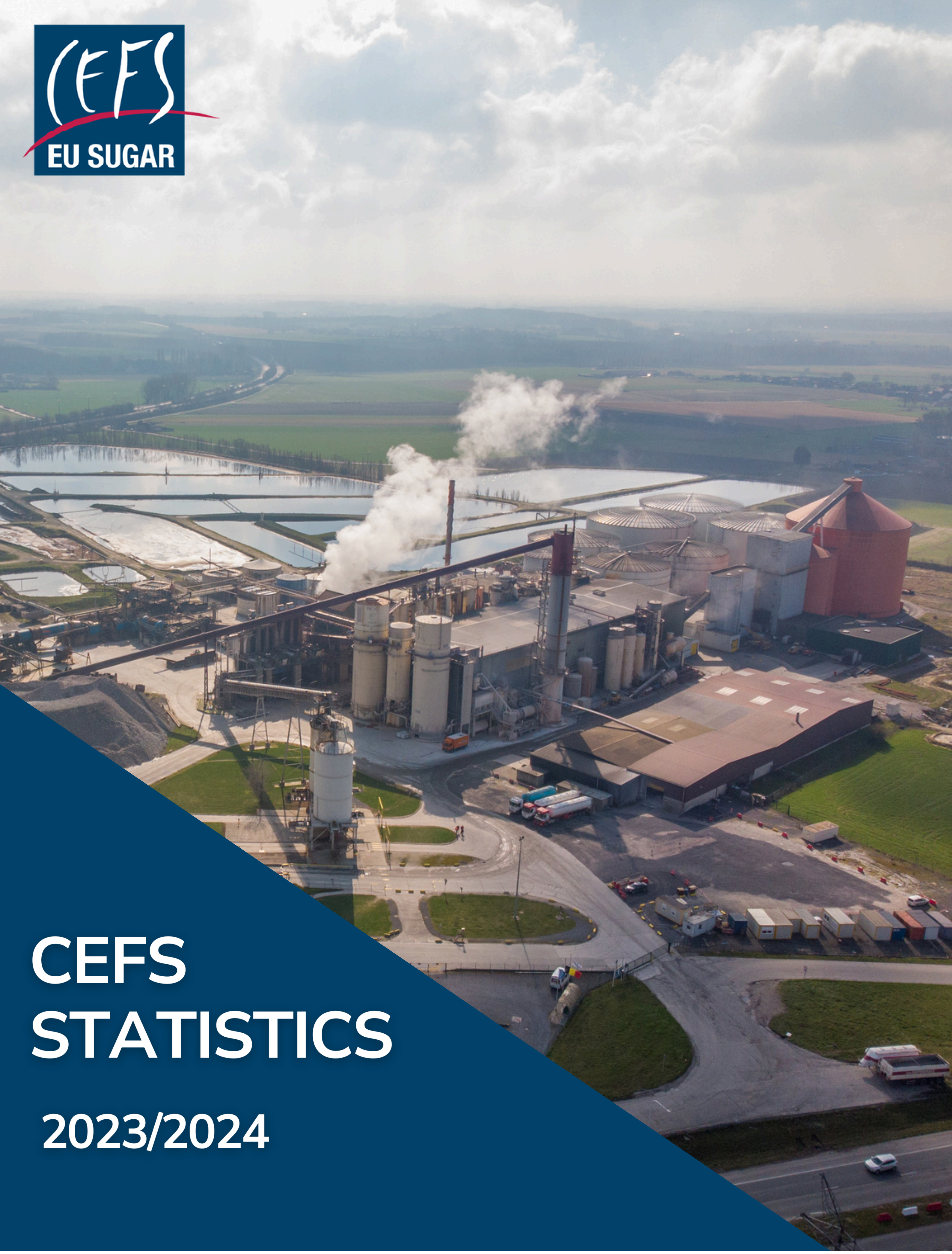

CEFS STATISTICS

2023/2024

Photo Credit: Iscal Sugar

March 2025

EXECUTIVE SUMMARY

- The 2023/24 campaign presented ongoing challenges due to persistently high energy costs, significant imports from Ukraine, and extreme climatic conditions, including droughts and heatwaves in certain regions.

- The EU produced almost 15.3 million tonnes of beet sugar during the 2023/24 campaign, an increase of 6.95% from the previous year, owing in large part to the first increase in sugar beet areas seen since the end of production quotas in 2017.

- One sugar factory closed its doors in advance of the 2023/24 campaign: Escaudoeuvres in France. The Luduș factory in Romania reopened under new ownership. In total 88 EU factories were operational for the 2023/24 beet sugar campaign.

- In 2023/24, the EU average sugar content in beets reached its lowest level in two decades at 16.50%. This is a -4.85% from 17.34% in 2022/23.

- The average length of the EU sugar production campaign in 2023/24 increased significantly to 133 days, the longest in 25 years.

- Production in 2024/25 is expected to be around 16.5 million tonnes, according to the European Commission.

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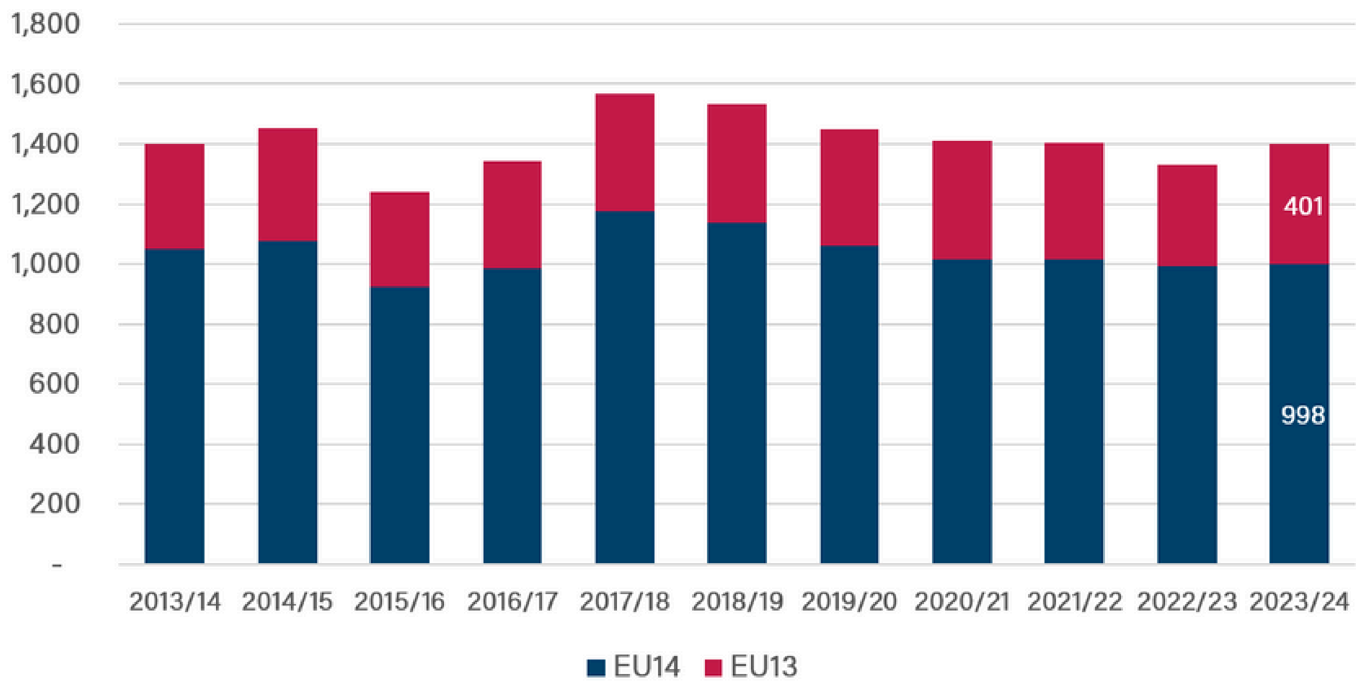
Photo Credit: Nordzucker Polska

1. AREAS

EU contracted sugar beet areas showed an increase of approximately 5% in the 2023/24 period, reversing the trend of consistent year-over-year declines since the end of production quotas in 2017. This growth was primarily driven by an expansion in the EU13 Member States, which saw their contracted areas rise significantly from 341 thousand ha in 2022/23 to 401 thousand ha in 2023/24. Meanwhile, EU14 Member States recorded a slight increase in contracted areas, rising from 990 thousand ha in 2022/23 to 998 thousand ha in 2023/24. The increase in areas reflected the improved market situation at that time.

Figure 1: Beet areas (thousand ha) in the EU27 (EU14+EU13)

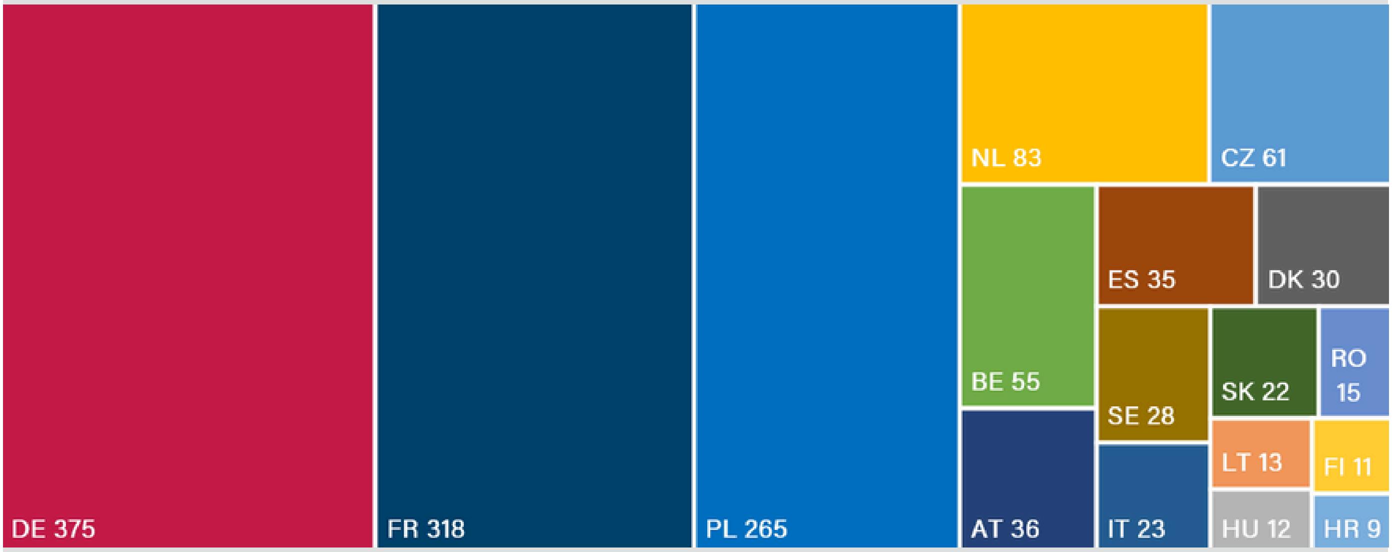


	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
EU27	1,402	1,453	1,239	1,344	1,567	1,533	1,449	1,413	1,405	1,332	1,399
EU14	1,048	1,077	925	987	1,175	1,137	1,063	1,016	1,015	991	998
EU13	354	377	314	357	392	395	386	397	390	341	401

1.4 million ha

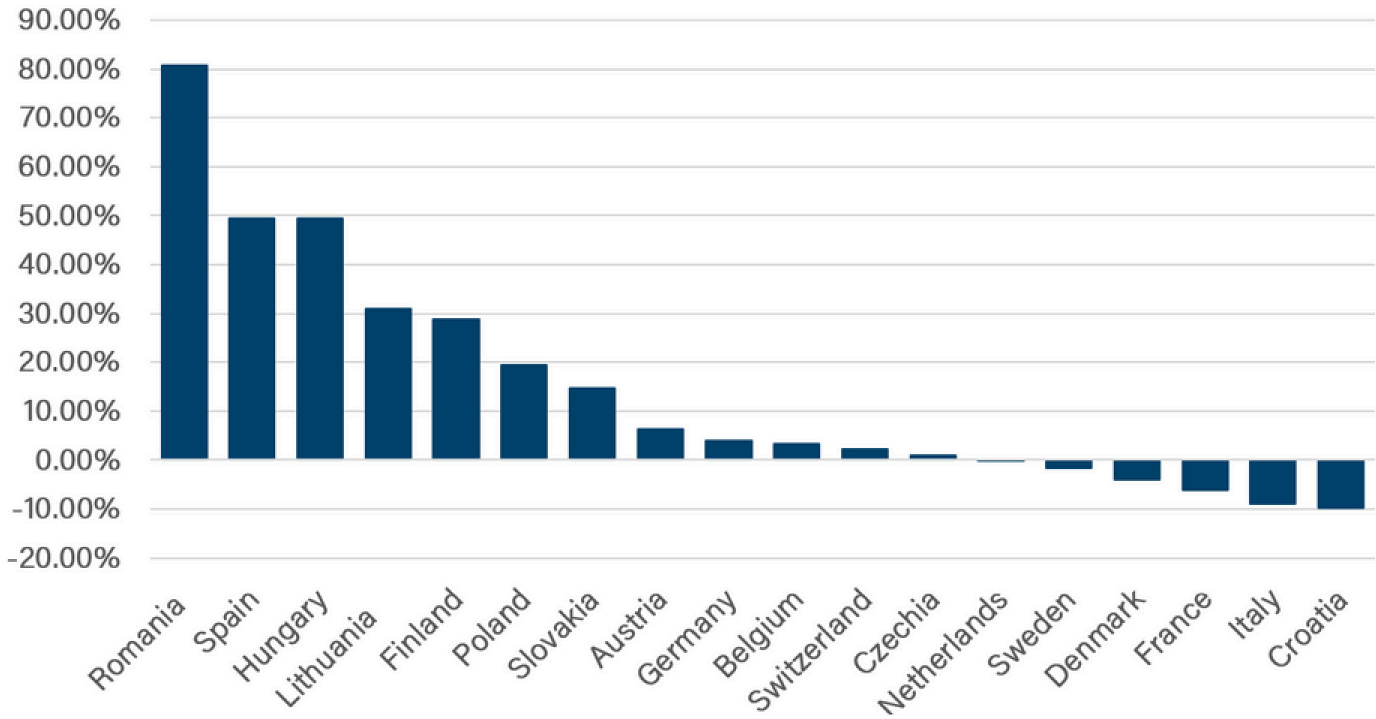
EU average sugar beet areas over the past five years

Figure 2: EU sugar beet areas 2023/24 (000 ha), by Member State

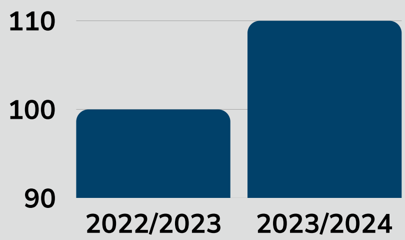


Regarding EU sugar beet areas by Member State for 2023/24, Romania experienced the most substantial increase in contracted areas, rising by 80.73%, driven in part by the reopening of the Luduș factory, which had been non-operational in 2022/23. Spain and Hungary also recorded significant expansions, with 49.44% and 49.36%, respectively. On the other hand, Croatia experienced the most significant decrease, with a reduction of 9.80%, followed by Italy (-8.95%) and France (-6.21%). These changes reflect the diverse regional adjustments within the EU in response to market conditions and climatic factors.

Figure 3: EU sugar beet area variation (%), 2023/24 vs 2022/23, by Member State



2. PAID BEET

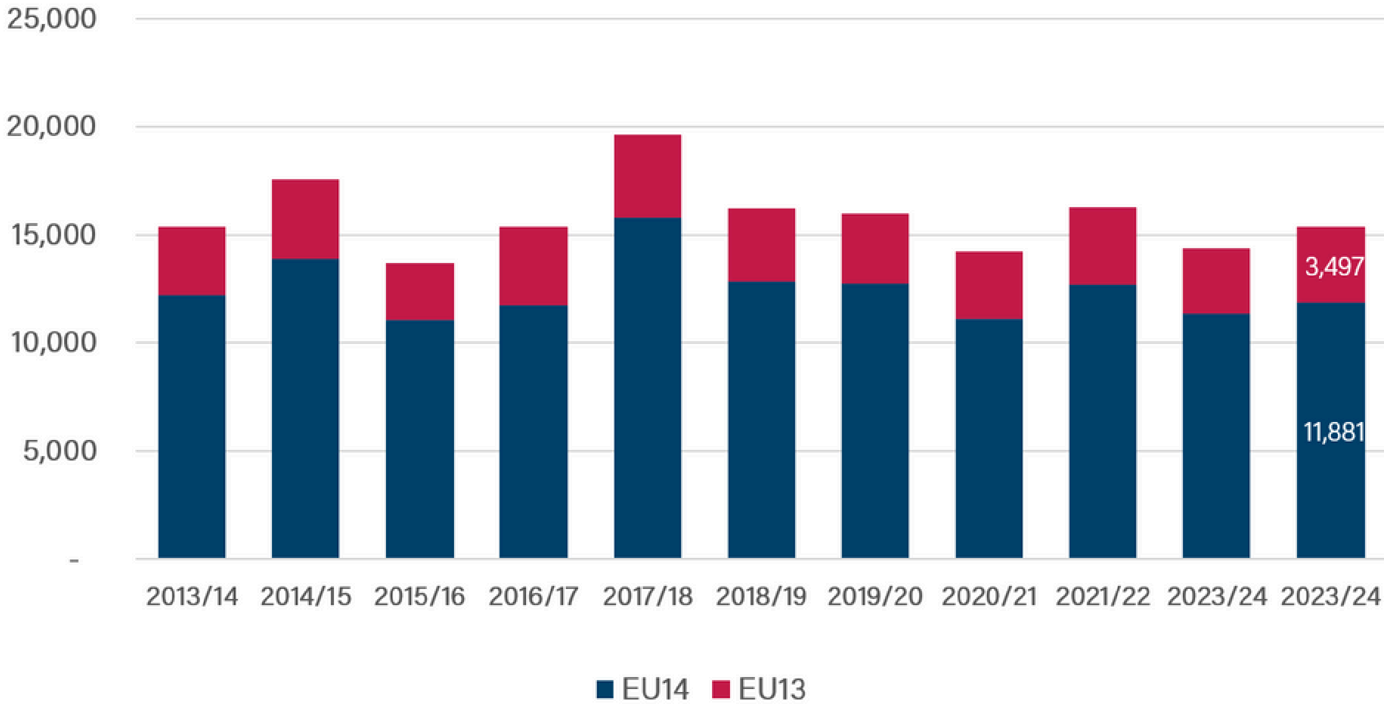


The total EU paid beet for 2023/24 was 110 million tonnes. This is an increase of 10.7% compared to 2022/23.

3. PRODUCTION

Total EU beet sugar production reached 15.3 million tonnes during the 2023/24 campaign. This is an increase of 6.95% compared to 2022/23.

Figure 4: Total sugar production (thousand tonnes) in the EU27 (EU14 + EU13)

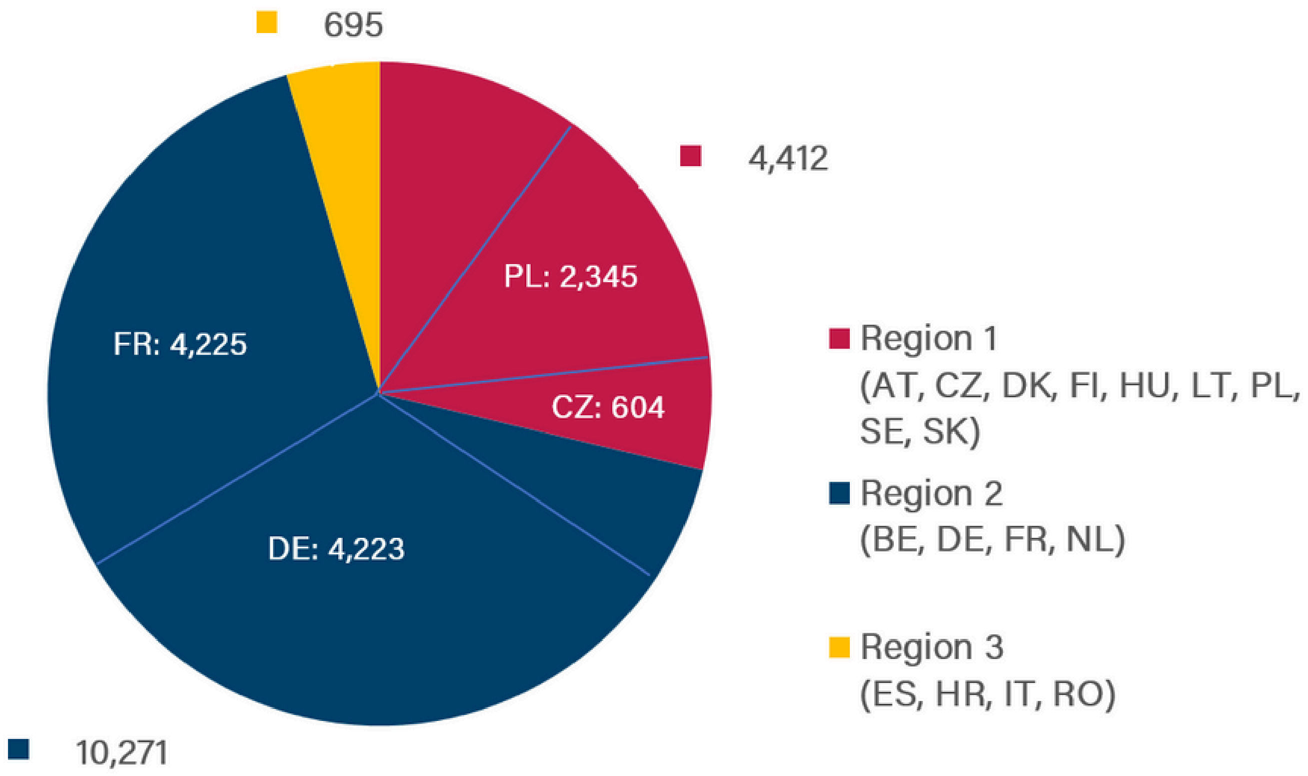


	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
EU27	15,356	17,588	13,709	15,358	19,638	16,230	15,988	14,230	16,255	14,379	15,378
EU14	12,200	13,877	11,048	11,717	15,796	12,820	12,743	11,086	12,685	11,321	11,881
EU13	3,155	3,711	2,661	3,641	3,842	3,410	3,245	3,143	3,570	3,058	3,497

Regarding beet sugar production among EU Member States, Hungary saw the most significant increase, with production rising by 70.30%, followed by Romania with 69.40% and Spain with 61.18%. Poland and Slovakia also recorded notable increases, with growth of 16.66% and 19.36%, respectively. Among other member states, France and Germany experienced moderate growth of 6.61% and 6.91%, respectively.

Conversely, Croatia experienced the most significant decrease, with a decline of 27.61%, followed by Sweden with a reduction of 23.29% and the Netherlands with a decrease of 6.57%.

Figure 5: Total sugar production by region (thousand tonnes rounded)



Production in 2024/25 is expected to be around

16.5 million tonnes

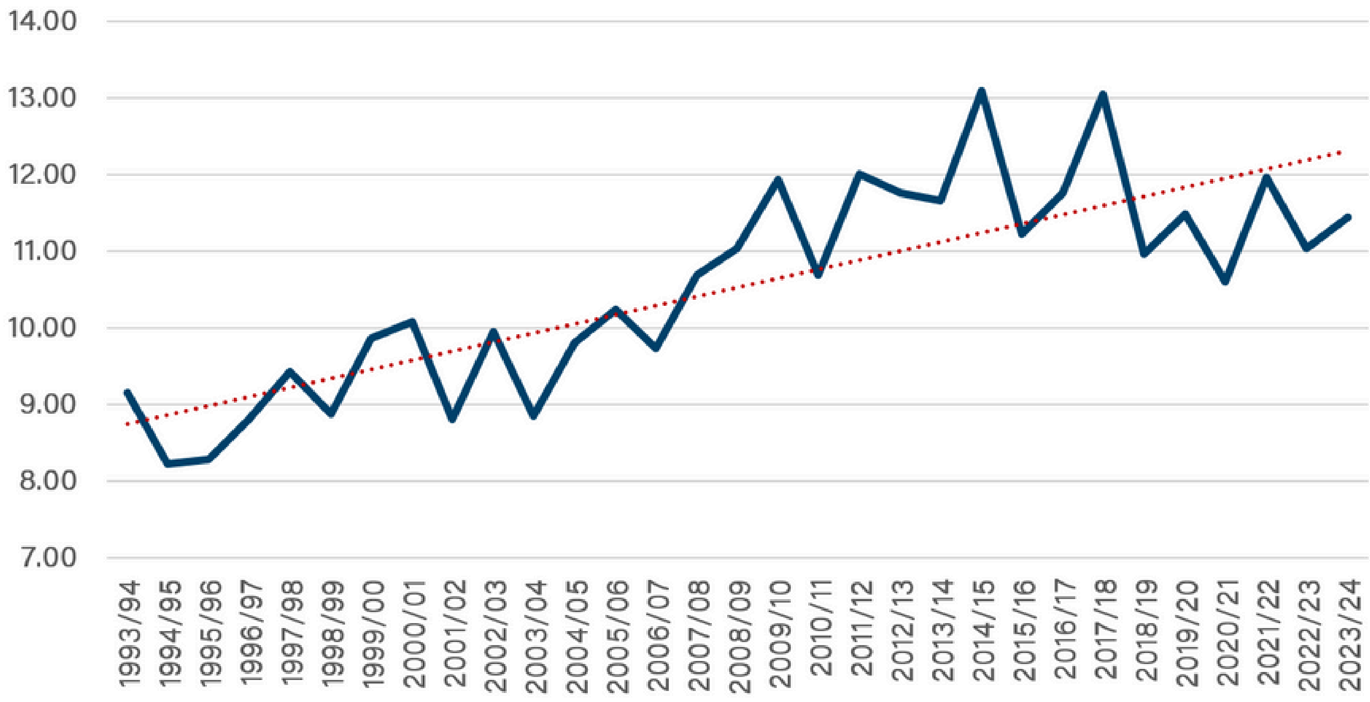
Source: European Commission

4. SUGAR YIELDS

Sugar yield is a function of sugar production divided by contracted beet areas. After a prolonged period of progress, boosting yields has proven increasingly complex over the past ten years due to the decreasing availability of plant protection products and volatile weather conditions.

As observed in the figure 6, the 2023/24 campaign showed a partial recovery from the previous year's low sugar yield. While 2022/23 recorded the second lowest level in the last five years at 11.04 t/ha, the 2023/24 yield improved slightly above the five-year average at 11.43 t/ha. This trend highlights the ongoing volatility in sugar yields since 2018/19, influenced by weather variability and projecting restrictions on plant protection products.

Figure 6: Sugar yields EU27, tonnes/ha



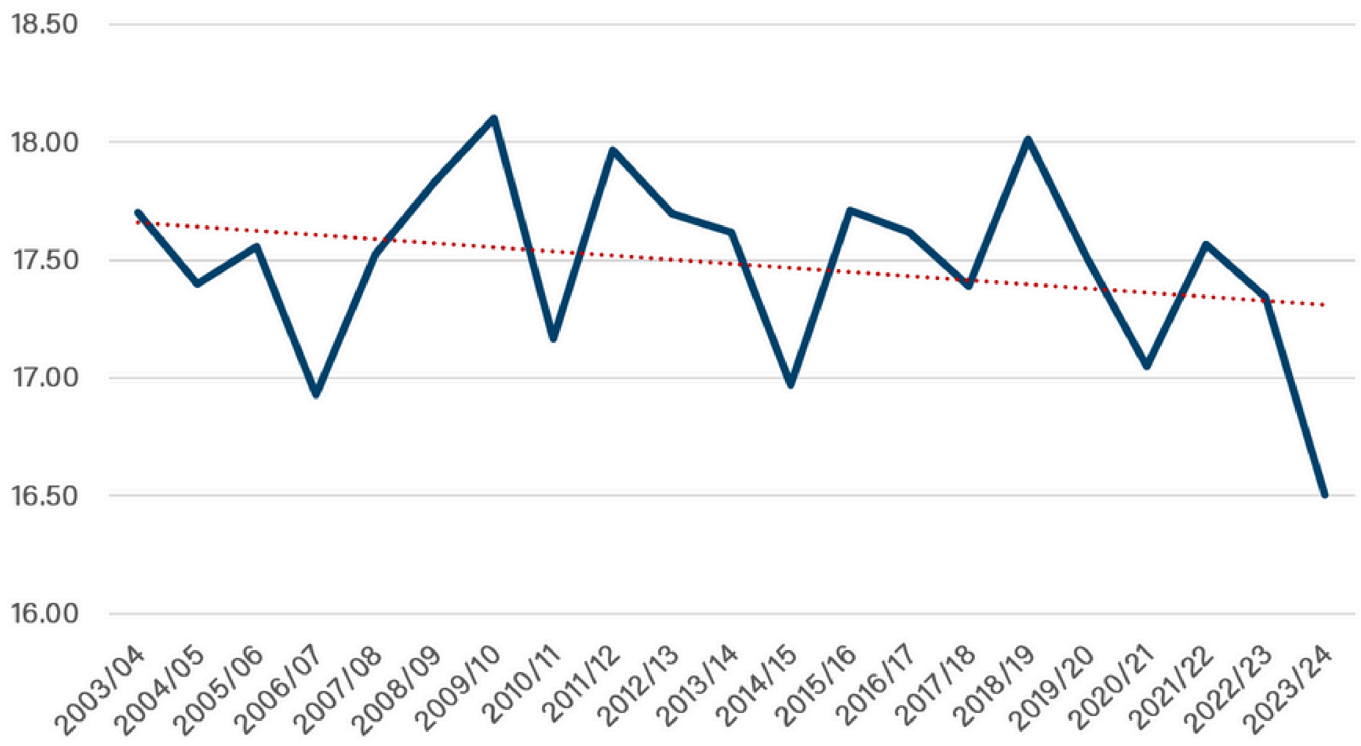
11.31 t/ha

Average sugar yield in EU over the past five years

5. SUGAR CONTENT

Sugar content is highly dependent on the weather; sunshine increases the sugar content in beets. In 2022/23 the EU average sugar content decreased to 17.34%, and in 2023/24, it declined further to reach its lowest level in two decades at 16.50%. This significant drop underscores the impact of unfavourable weather conditions and the challenges posed by climate variability.

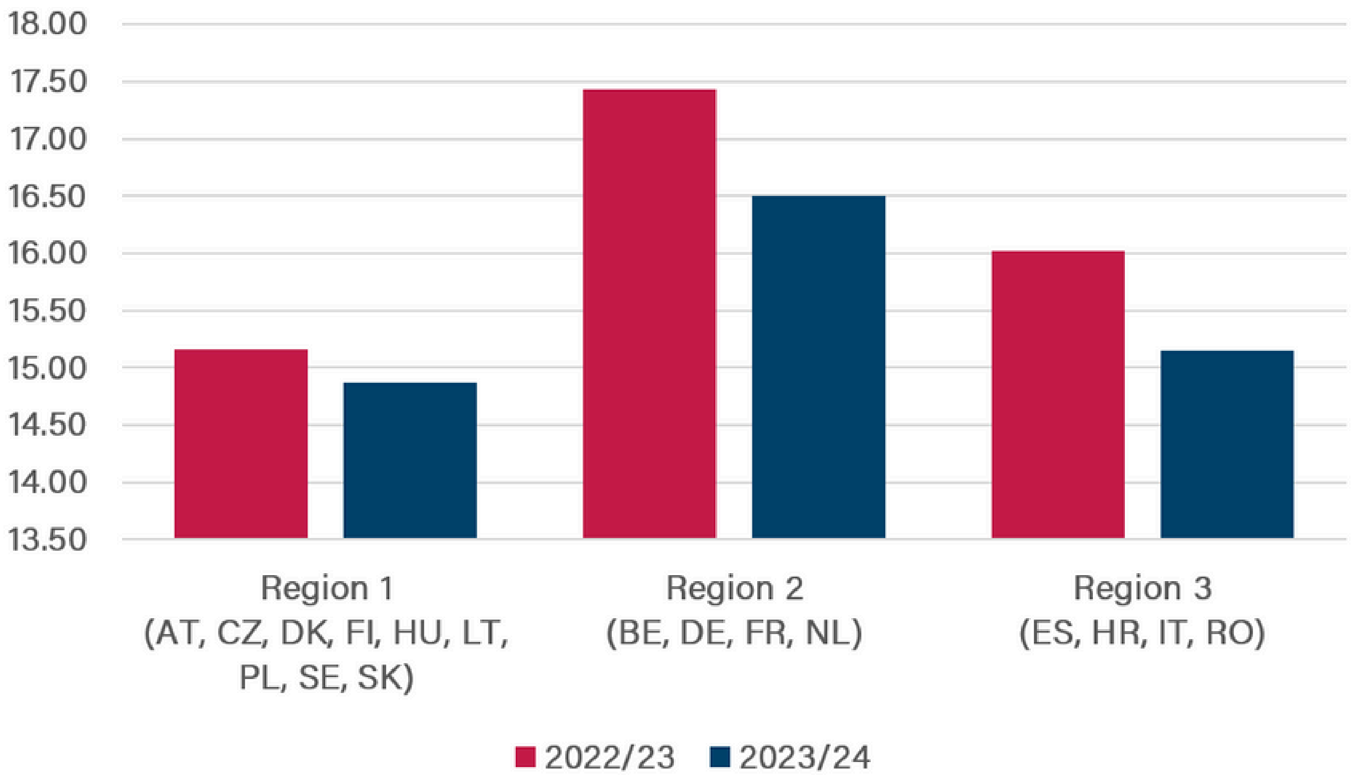
Figure 7: Average sugar content in beet when delivered (%) in EU27



Region 2 recorded the highest average sugar content, at 16.5%, down from 17.4% in 2022/23.

Region 3 also saw a substantial drop, at 15.15% from 16.02%.

Figure 8: EU sugar content in beet (%), 2023/2024 and 2022/2023, by region



Average sugar content in beet when delivered over the past five years (EU27)

17.20 %

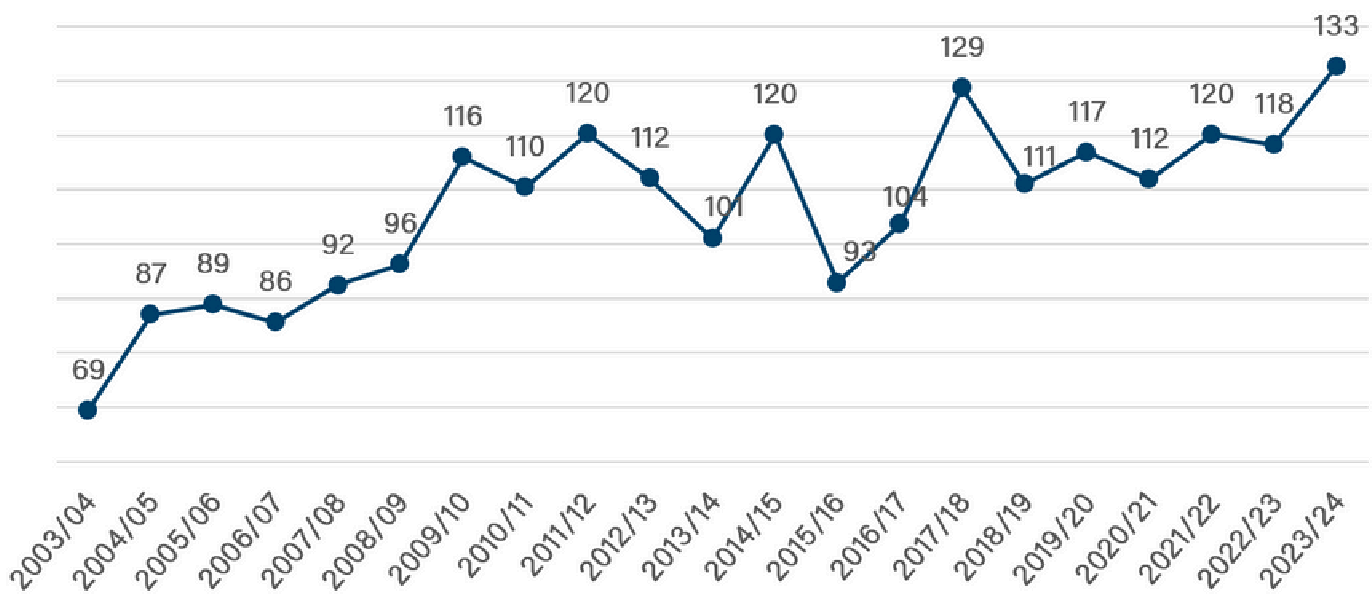
6. CAMPAIGN LENGTH

In most European countries, sugar is produced during a processing campaign of around 100 days. Since it is not possible to store sugar beets for long periods, year-round production of beet sugar is not possible.

Longer campaigns allow for more efficient factory capacity utilisation, leading to better fixed-cost distribution. Campaign lengths have increased substantially over the past twenty years as European sugar producers have worked to increase their competitiveness.

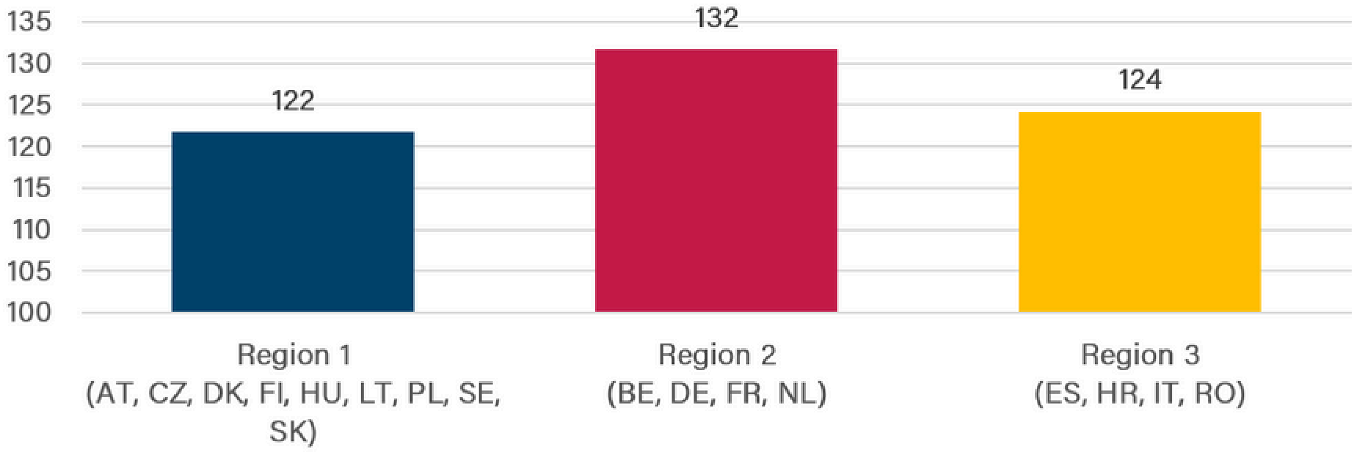
The length of an average EU sugar production campaign in 2023/24 increased to 133 days, the longest recorded over the past 20 years. This represents a significant increase compared to the 118 days in 2022/23 and the 120 days in 2021/22 (see chart below).

Figure 9: Average campaign length in the EU27 over the last 20 years (days)



In 2023/24, the shortest campaigns in the EU were found in Central and Eastern Europe, with an average duration of 122 days, reflecting a considerable increase compared to 2022/23's 100 days. The length of the campaign in Southern Europe (Region 3) increased to 124 days from 101 days in 2022/23. And Region 2 (Western Europe) registered the longest average campaign length recorded at 132 days.

Figure 10: Average campaign length in EU regions in 2023/24 (days)



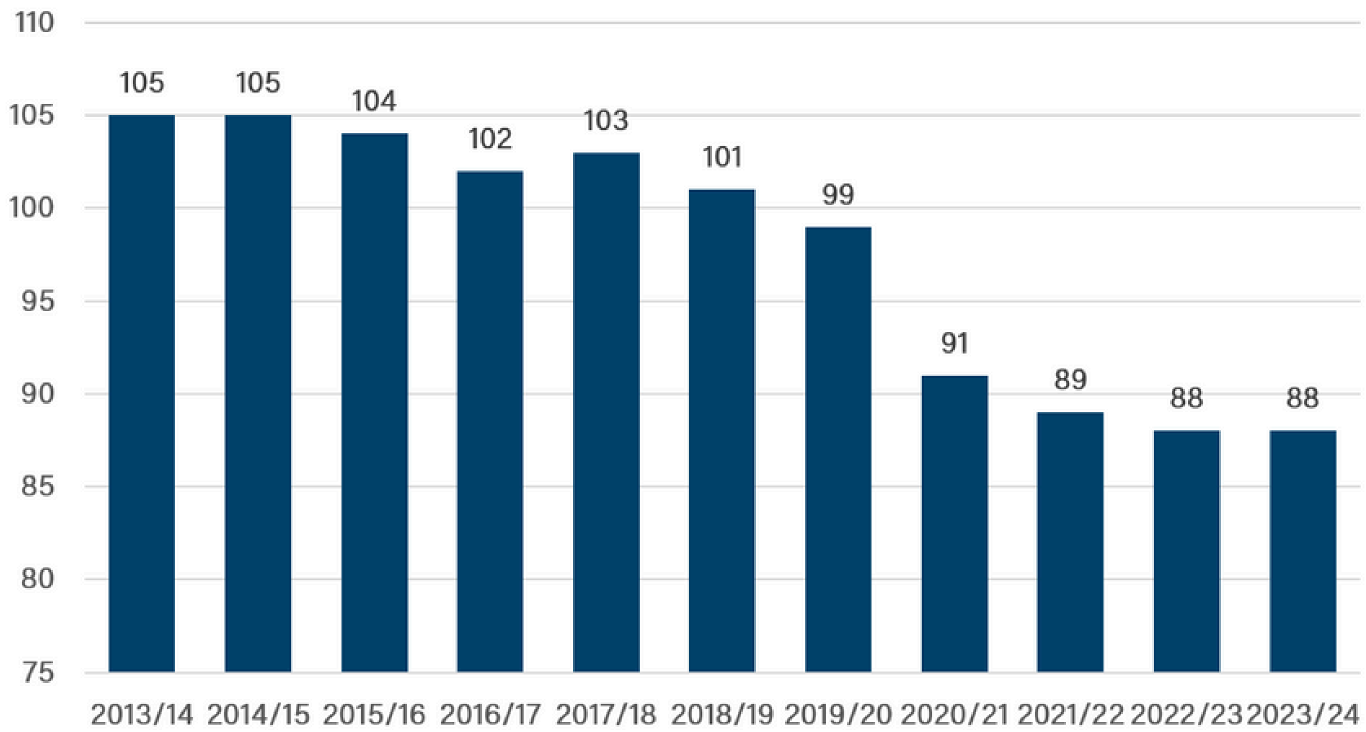
120

days Average campaign length across EU27 over the past five years

7. FACTORIES

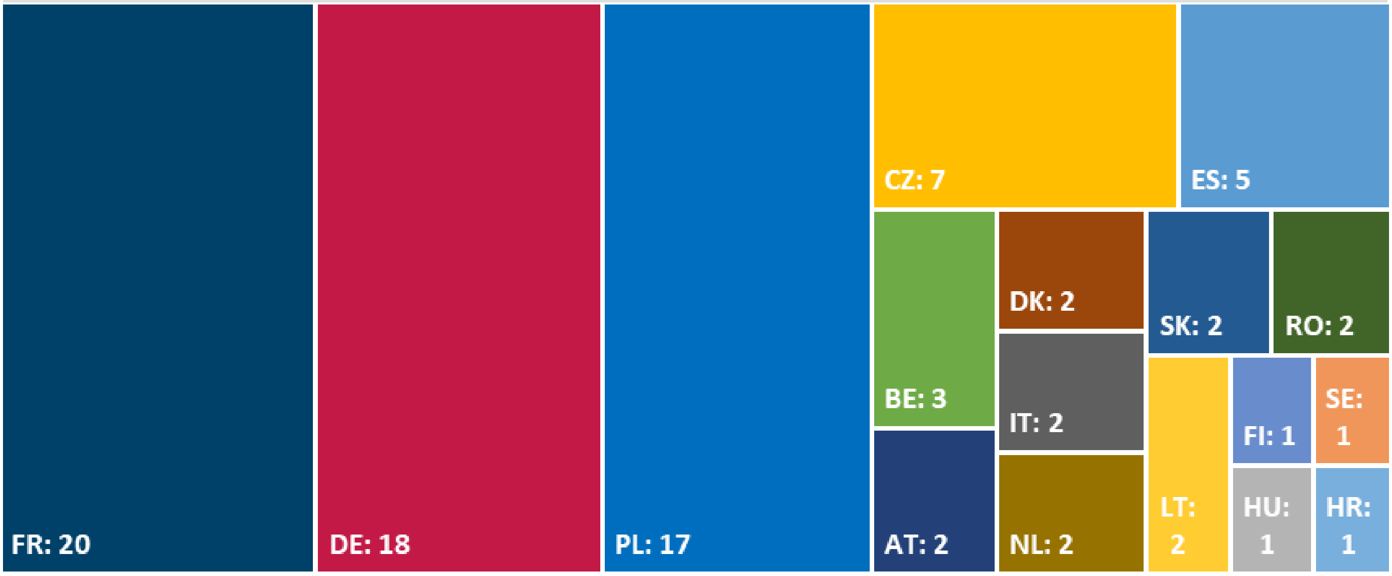
During the 2023/24 campaign, the number of operational factories across the EU remained at 88, with the closure of one factory in France compensated by the reopening of another in Romania.

Figure 11: Number of EU beet sugar factories over the last ten years



Most EU beet sugar factories are located in 3 countries – namely France, Germany and Poland.

Figure 12: Number of EU beet sugar factories per Member State

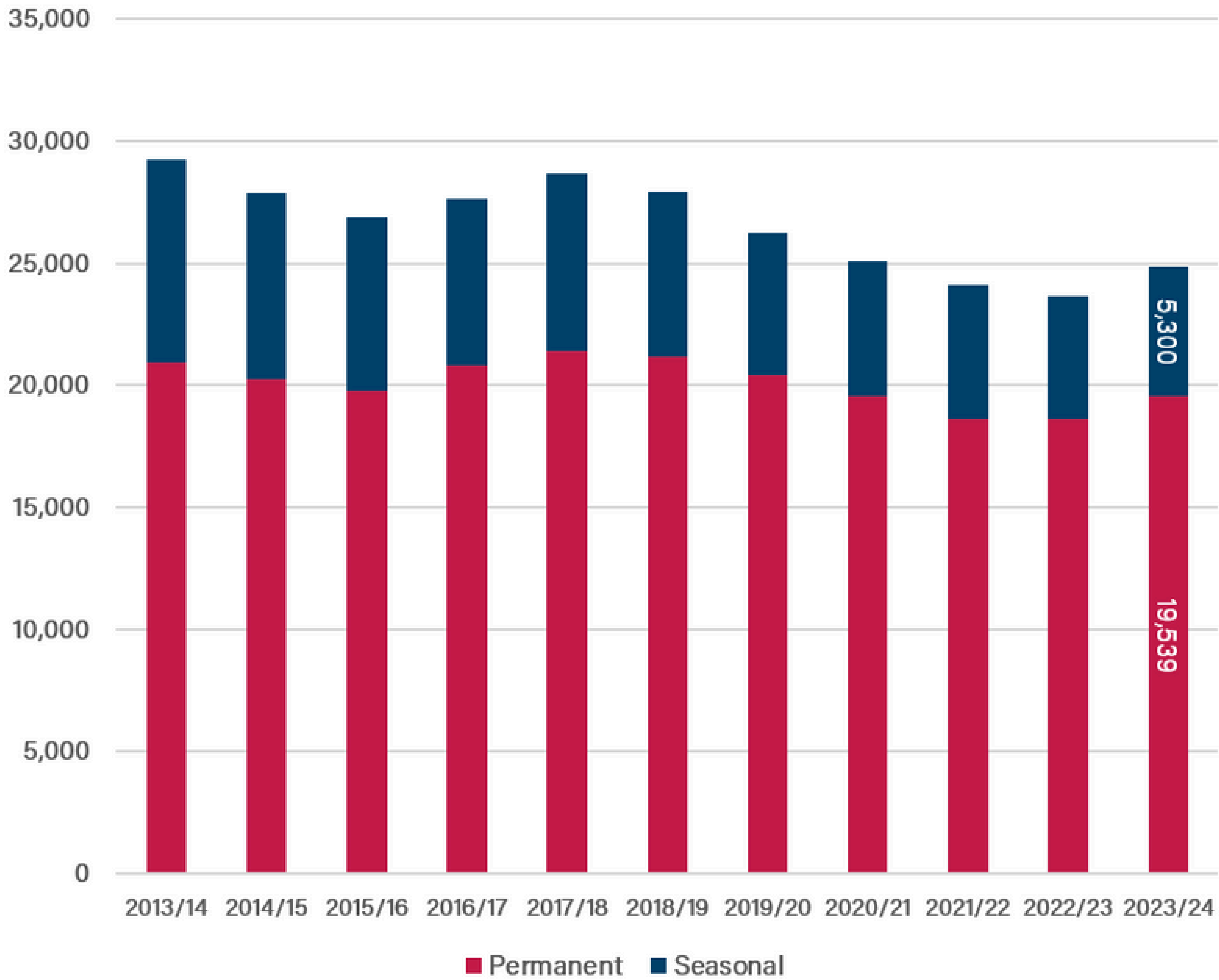


8. EMPLOYMENT

During the 2023/24 campaign, almost 24,839 workers were directly employed in sugar production, 5.16% more than in the 2022/23 MY. This rise can be attributed to several factors, including a longer campaign, adjustments to shift systems, a growing workforce to meet climate neutrality goals and higher regulatory requirements, greater demand for IT specialists driven by digitisation, and job creation from expansion into alternative business areas.

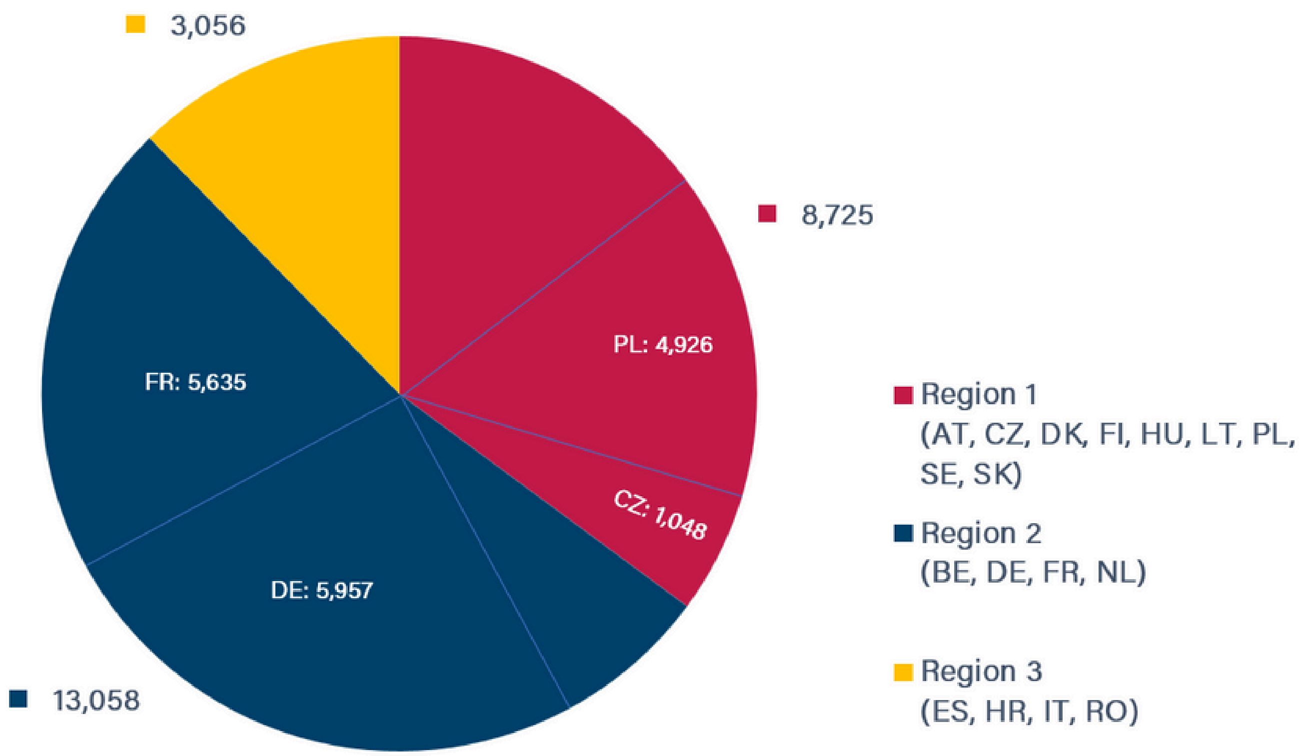
A substantial proportion of employment is seasonal. Around 900 more permanent workers were employed in the sector in 2023/24. Since 2017/18, the first year after the end of production quotas, 3,800 fewer people have been directly employed by the EU sugar sector.

Figure 13: Sugar industry employment during the beet processing campaign



	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Permanent	20,922	20,243	19,808	20,797	21,368	21,174	20,399	19,560	18,635	18,642	19,539
Seasonal	8,334	7,637	7,095	6,840	7,307	6,714	5,838	5,533	5,448	4,979	5,300
Total	29,256	27,880	26,904	27,637	28,675	27,888	26,237	25,093	24,083	23,621	24,839

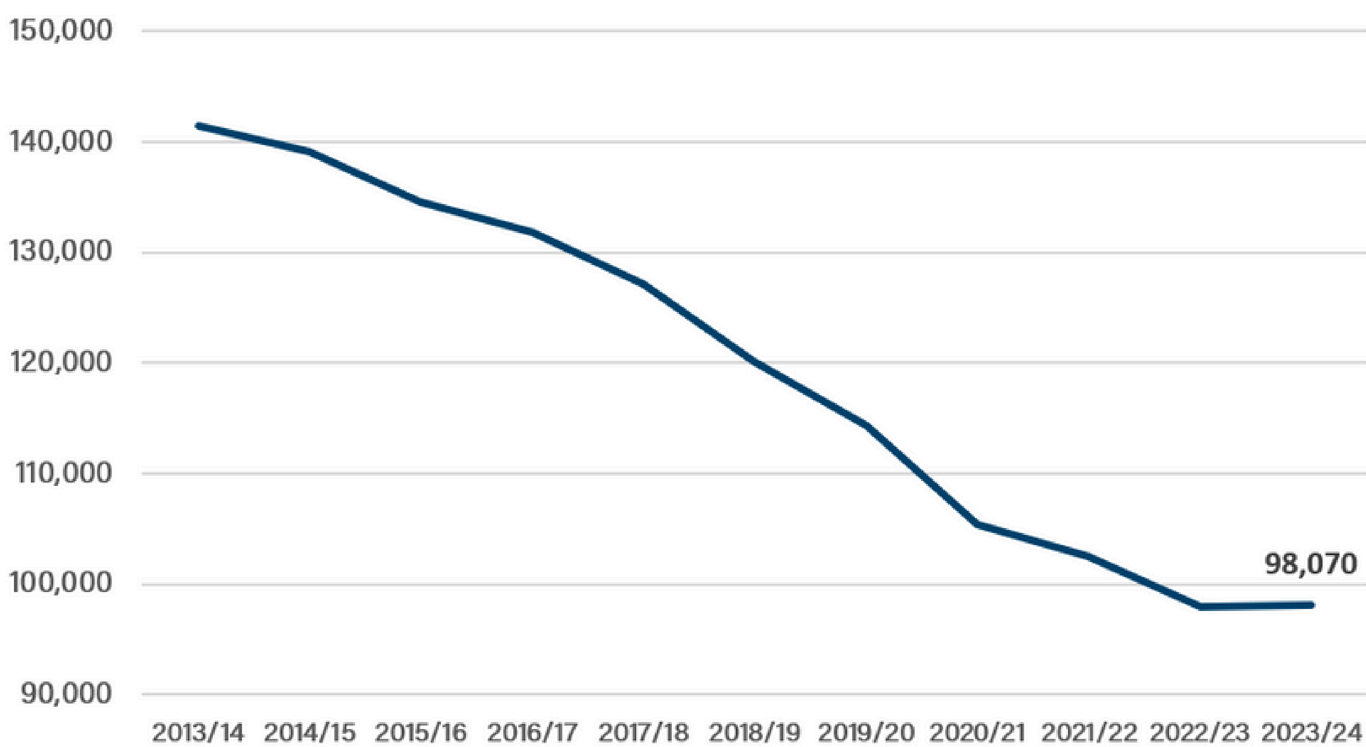
Figure 14: Sugar industry employment during the beet processing campaign by region



9. BEET GROWERS

In 2023/24 98,070 growers supplied beets to EU sugar factories, marking a slight increase from 97,909 in 2022/23. This stabilises the downward trend seen in recent years, though the total number of beet growers has declined significantly over the past decade: over 43,300 growers have exited sugar beet cultivation since 2013/14.

Figure 15: Number of beet growers in the EU over the last ten years



98,070

Growers supplied beets to EU sugar factories in 2023/24

10. METHODOLOGY

- The information contained in this report is collected from CEFS members on a confidential basis.
- 'EU' refers to the 27 current Member States of the European Union. This grouping is used as a consistent basis for the historical EU data series in the annex.
- 'EU14' refers to the following EU Member States: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Portugal, Spain and Sweden.
- 'EU13' refers to the following EU Member States: Bulgaria, Croatia, Czechia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia.
- 'Region 1' covers the following EU Member States: Austria, Czechia, Denmark, Finland, Hungary, Lithuania, Poland, Slovakia and Sweden.
- Region 2' covers the following EU Member States: Belgium, France, Germany and the Netherlands.
- 'Region 3' covers the following EU Member States: Bulgaria, Croatia, Greece, Italy, Portugal, Romania and Spain (please note that Bulgaria, Portugal and Greece are not sugar producing countries).
- A sensitivity analysis is conducted on the basis of the final production and areas figures published by the European Commission: where member areas/production data are found to diverge by more than 5% from the final figures of the European Commission, the Commission's figures are used.
- Aggregated averages for sugar content are weighted by paid beet production.
- Aggregated averages for campaign length and sugar yield are weighted by sugar production.