



# CEFS STATISTICS 2024/2025

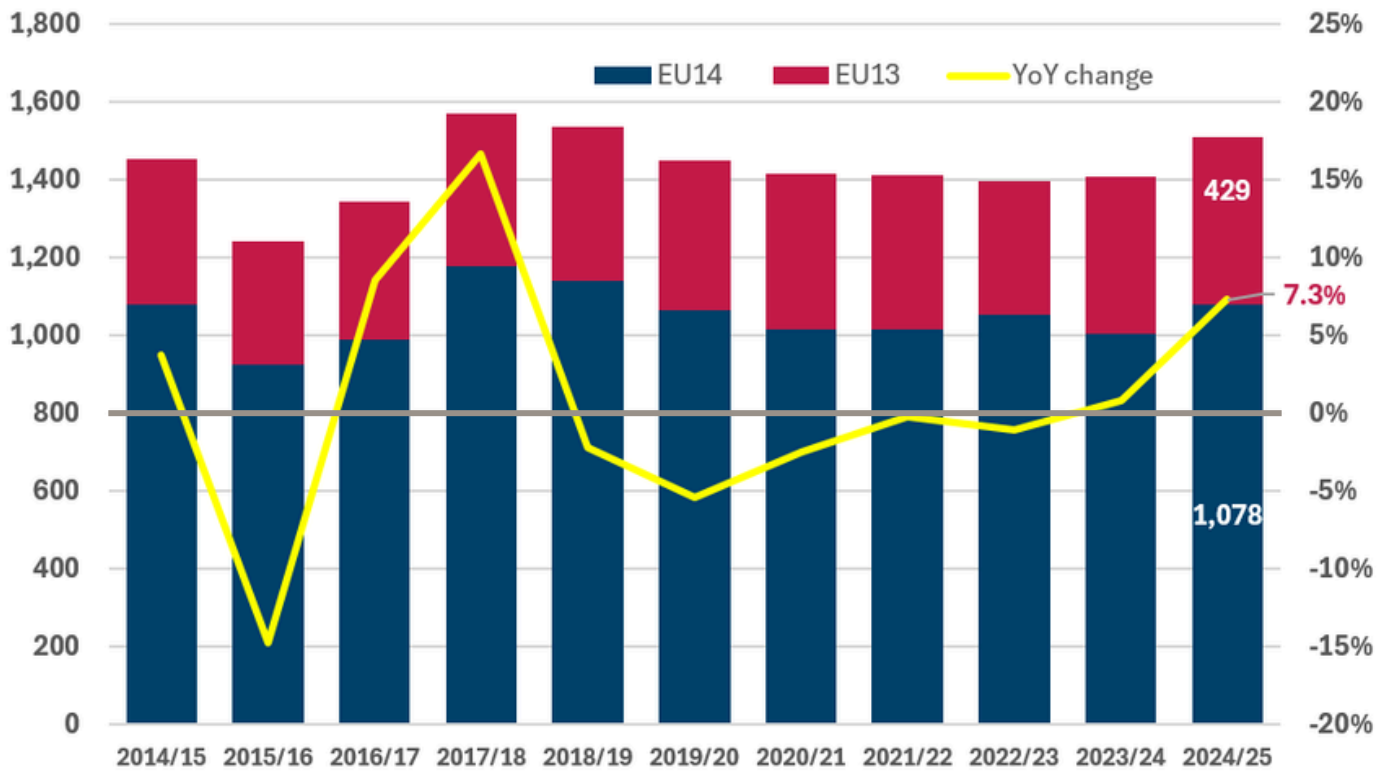
# EXECUTIVE SUMMARY

- The EU produced 16.368 million tonnes of beet sugar during the 2024/25 campaign, an increase of 6.1% from the previous year.
- The EU contracted sugar beet area increased by 7.3% YoY (102,054 ha) in the 2024/25 marketing year to 1.507 million ha, driven largely by a 44,645 ha increase in France and Germany.
- In 2024/25 the average EU sugar content in beets continued its downward trend, falling by 0.18 percentage points (1.25%) to 16.18%. This represents a total decline of approximately 10.2% compared to the highs recorded six years prior.
- The average length of the EU sugar production campaign reached a new high of 135 days in 2024/25.
- The average EU sugar yield decreased by 1% YoY to 11.21 tonnes per ha; since the 2017/18 peak, sugar yields have now declined by more than 13.2%. The EU average sugar content in beets reached a new low of 16.18%.
- The number of beet growers and employees at sugar factories grew slightly in 2024/25.
- For 2025/26 the European Commission expects production to hit 16.029 million tonnes.

# 1. AREAS

EU contracted sugar beet areas grew by 7.1% year-on-year in the 2024/25 marketing year, marking the largest expansion since 2017/18. Overall, the contracted area grew by 99,454 ha. Three-quarters of this growth was concentrated in EU14 countries, with France and Germany together accounting for 44,645 ha.

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



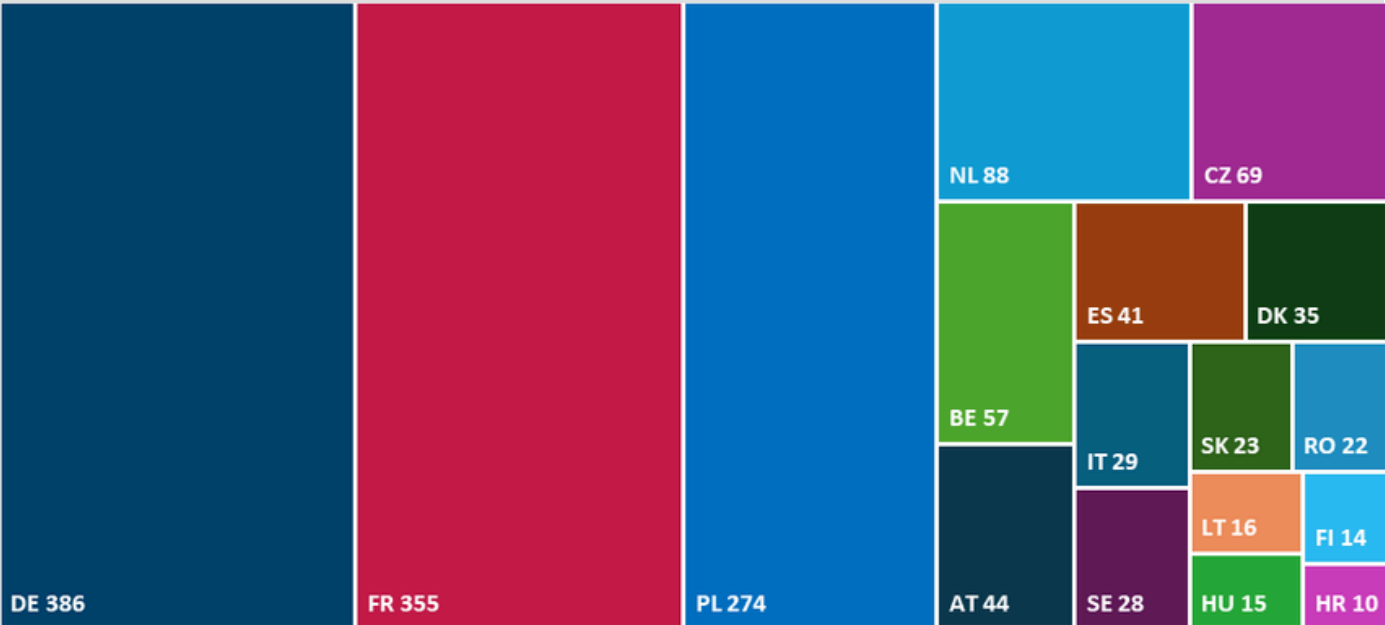
Areas (ha, '000)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
<b>EU27</b>	1,453	1,239	1,344	1,567	1,533	1,449	1,413	1,409	1,394	1,405	1,507
<b>EU14</b>	1,077	925	987	1,175	1,137	1,063	1,016	1,015	1,052	1,002	1,078
<b>EU13</b>	377	314	357	392	395	386	397	394	343	403	429



## 1.426 million ha

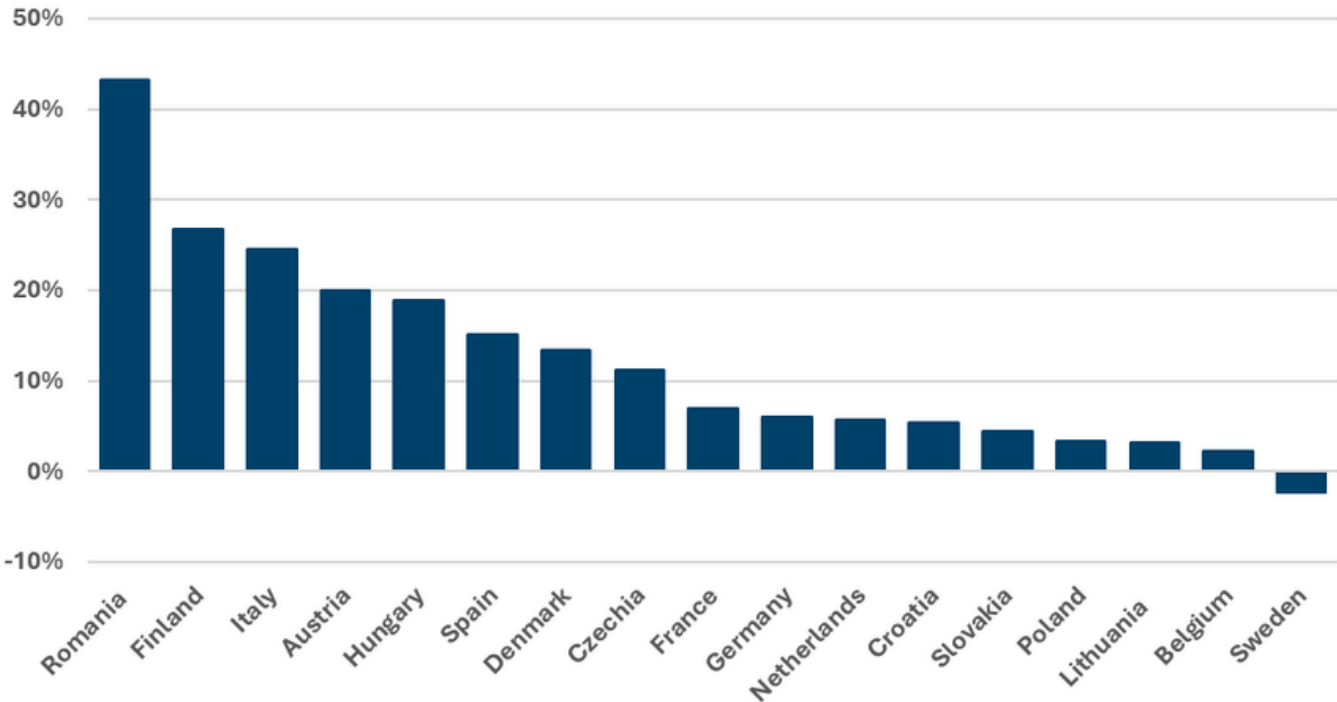
EU average sugar beet areas over the past five years

**Figure 2:** EU sugar beet areas 2024/25 (000 ha), by Member State

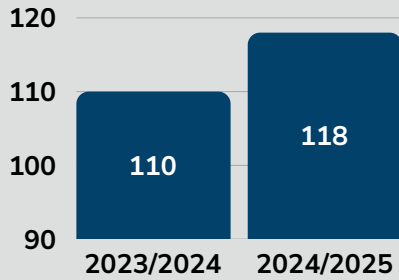


Mirroring the previous marketing year, Romania recorded the largest relative increase in contracted sugar beet areas (43.3%), reaching 21.5 thousand ha, presumably due to the reopening of the Ludus factory. Despite this growth, the contracted sugar beet area in Romania remains approximately 10% smaller than the pre-quota average. With a 26.7% increase, Finland’s areas have returned to levels not seen for nearly 15 years. Conversely, area decreases were recorded only in Sweden.

**Figure 3:** EU sugar beet area change YoY (%), 2024/25 vs 2023/24, by Member State



## 2. PAID BEET

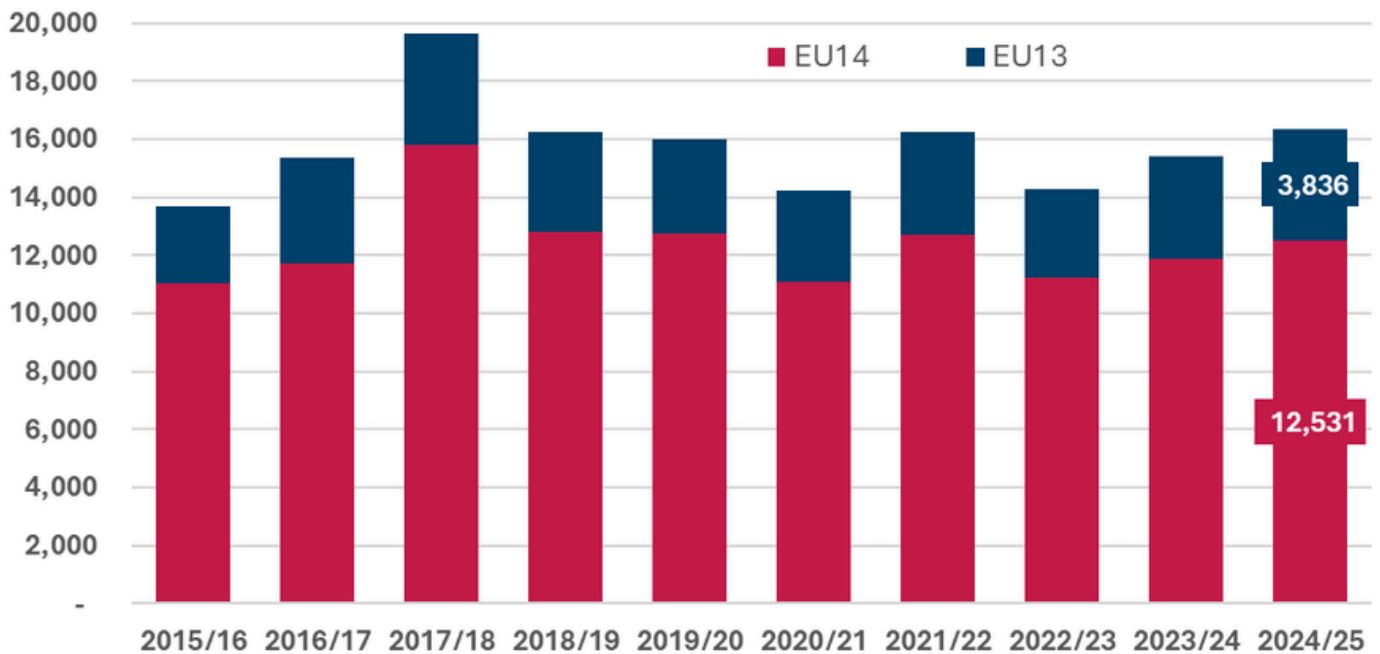


The total EU paid beet for 2024/25 was 118 million tonnes. This represents an increase of 6.7% compared to 2023/24.

## 3. PRODUCTION

Total EU beet sugar production reached 16.368 million tonnes during the 2024/25 campaign. This is an increase of 6.1% compared to 2023/24.<sup>1</sup>

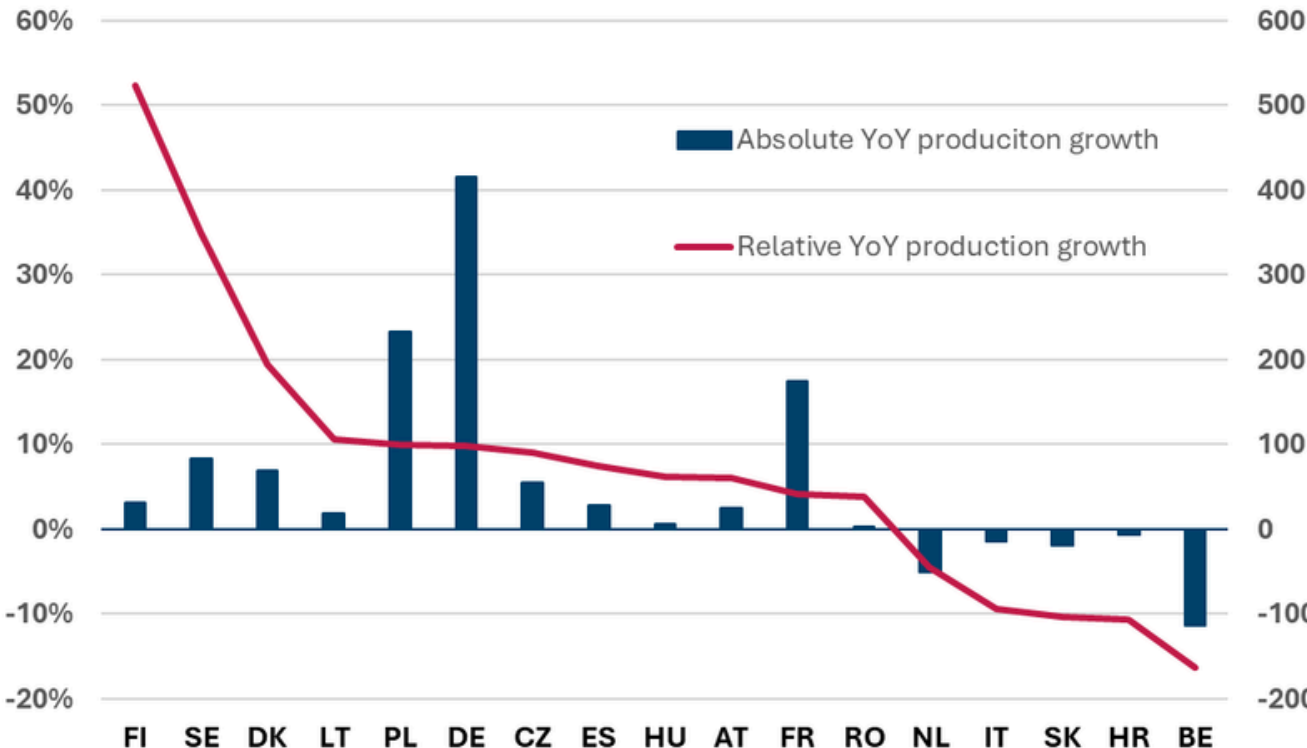
**Figure 4:** Total sugar production (thousand tonnes) in the EU27 (EU14 + EU13)



Production (tonnes, '000)	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
<b>EU27</b>	17,588	13,709	15,358	19,638	16,230	15,988	14,230	16,255	14,294	15,427	16,368
<b>EU14</b>	13,877	11,048	11,717	15,796	12,820	12,743	11,086	12,685	11,236	11,881	12,531
<b>EU13</b>	3,711	2,661	3,641	3,842	3,410	3,245	3,143	3,570	3,058	3,546	3,836

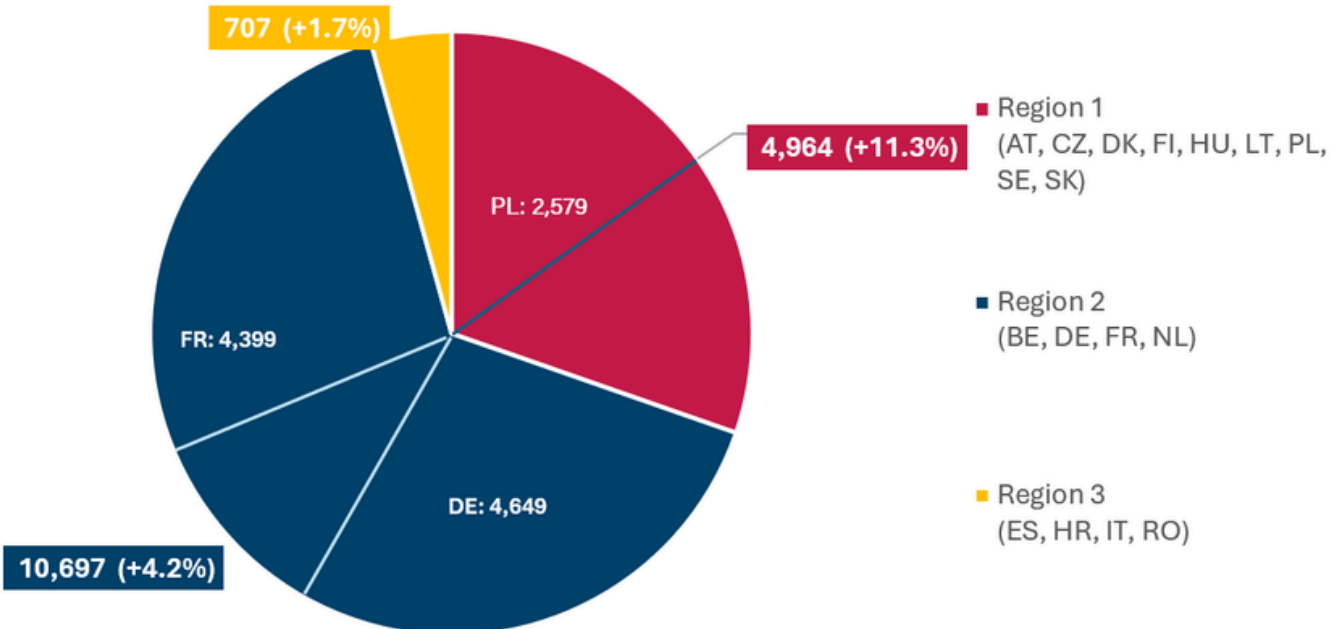
<sup>1</sup> Production in the Marijampolė Sugar Factory (Lithuania) estimated at 43,000 tonnes.

**Figure 5:** Absolute and relative production growth by Member State (in % and thousand tonnes)



The most significant relative growth in production occurred in Northern Europe, led by Finland (52.3%), Sweden (35%), and Denmark (19.5%). Production in Poland and Germany grew by 9.9%, translating to an additional 233 and 416 thousand tonnes, respectively. In five Member States, production decreased YoY, ranging from a 4% drop in the Netherlands to a 16% decline in Belgium, where output fell by more than 113 thousand tonnes compared to the previous campaign.

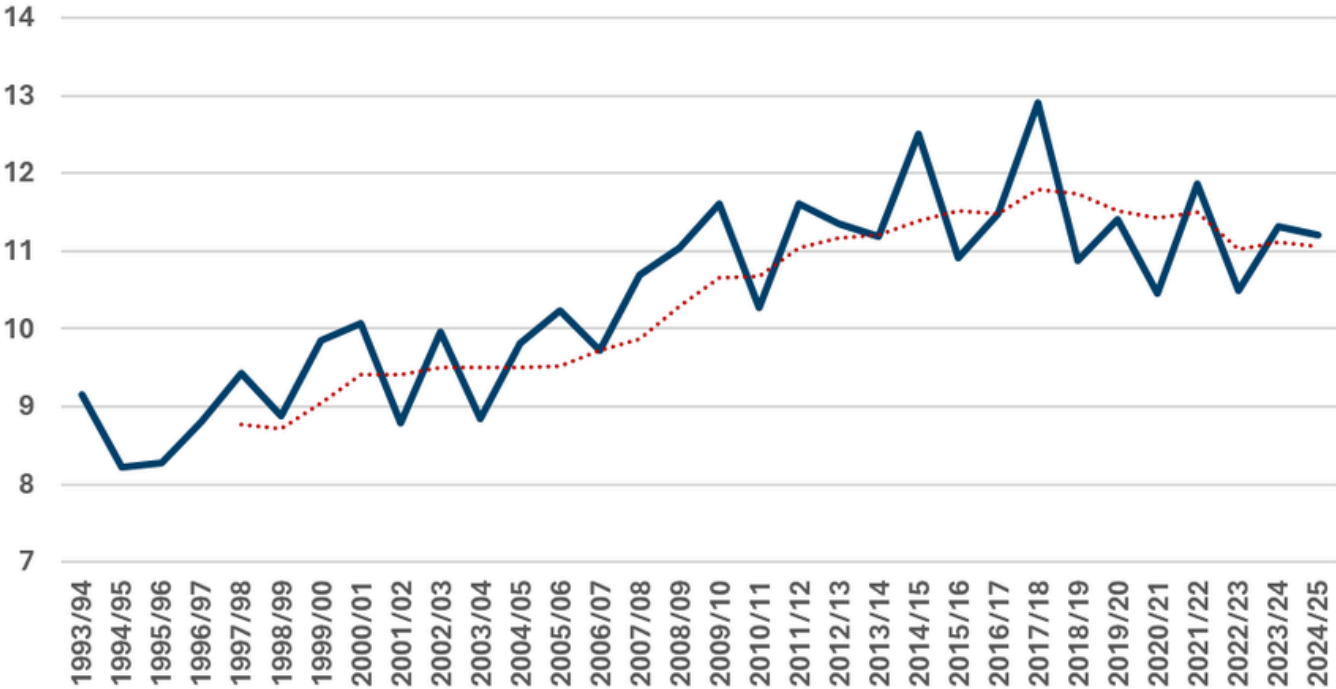
**Figure 6:** Total sugar production by region (in thousand tonnes), with YoY change in brackets



# 4. SUGAR YIELDS

Year-on-year, the sugar yield in Europe decreased by 1% to 11.21 tonnes of sugar per ha. Since the 2017/18 peak sugar yields have declined by over 13.2%.

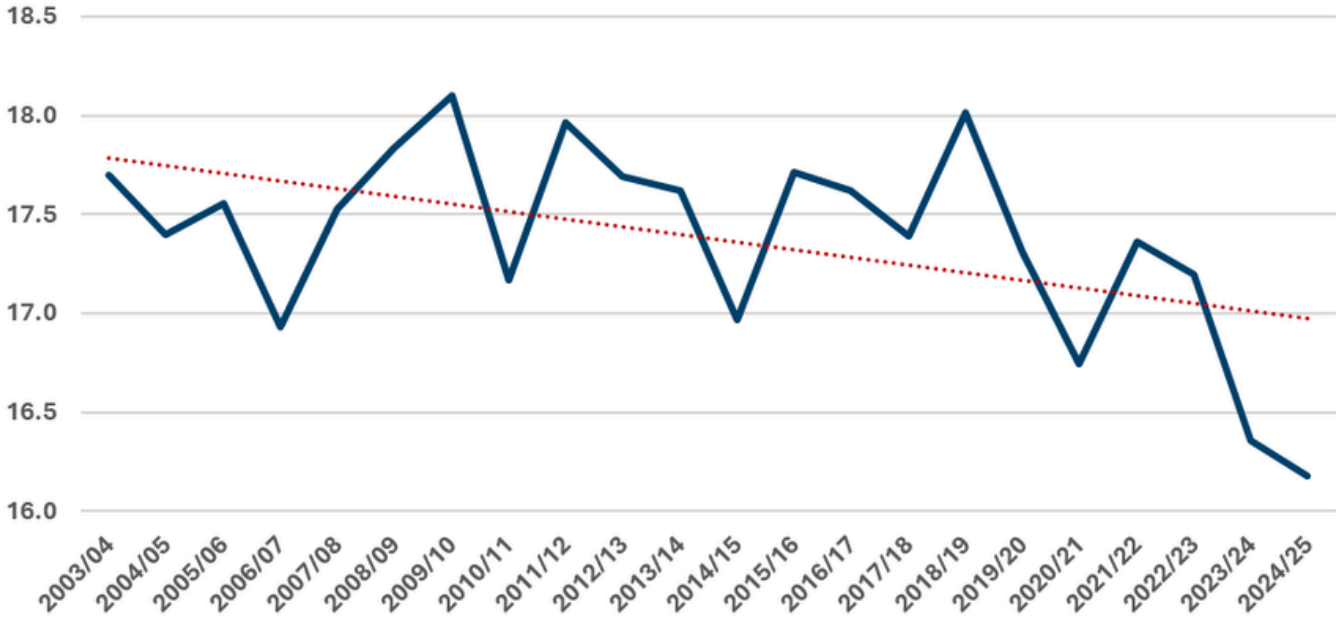
**Figure 7:** Sugar yields EU27 (in tonnes/ha) with a 5-year moving average



# 5. SUGAR CONTENT

The downward trend in sugar content persists, with a slight decrease (1.12%, or 0.18 p.p.) to 16.18% in 2024/25. Sugar content has dropped approximately 10.2% from the highs recorded six years ago.

**Figure 8:** Average sugar content in beet when delivered (%) in EU27



**1.83 p.p.**

**drop in sugar content from the highs recorded six years ago**

Sugar content in Regions 1 and 3 fell by around 2%, while the decrease in Region 2 was notably smaller at only 0.63%.

**Figure 9:** EU sugar content in beet (%), 2024/2025 and 2023/2024, by region

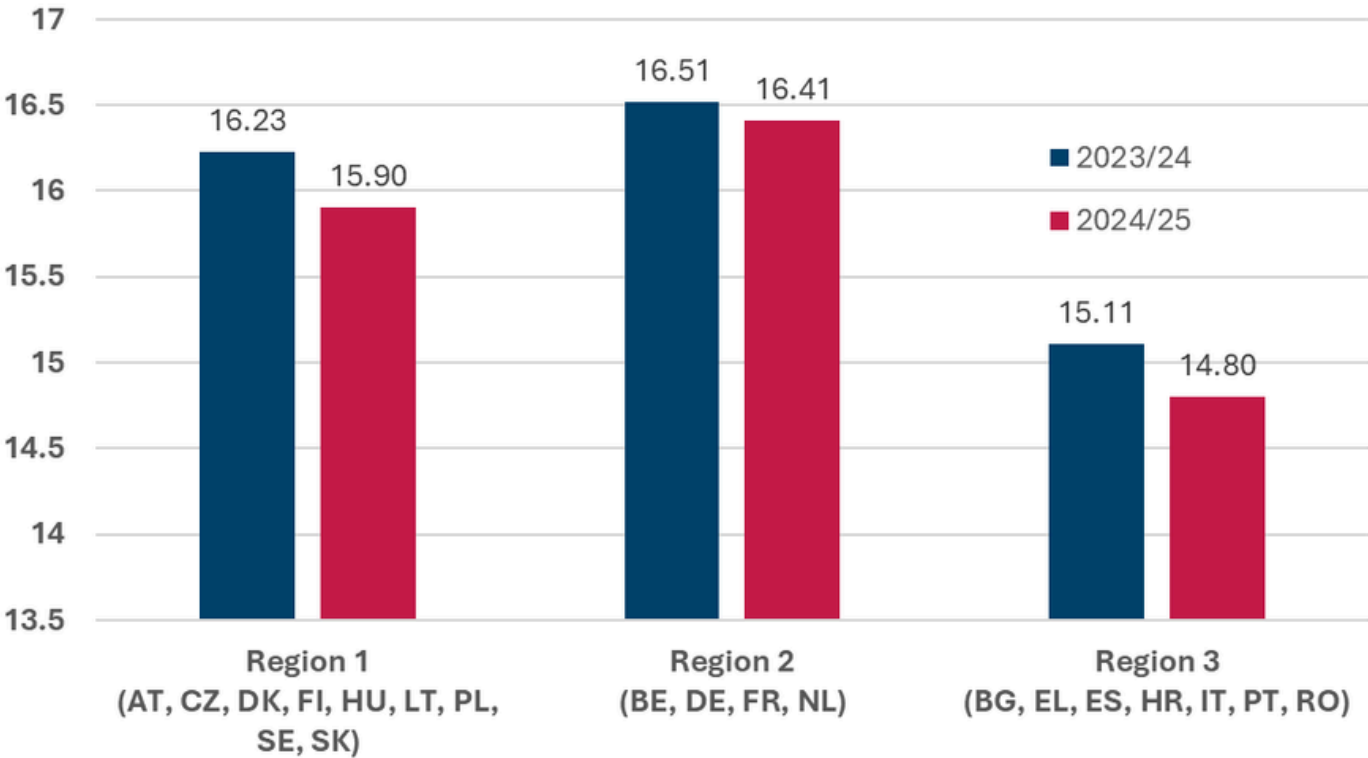
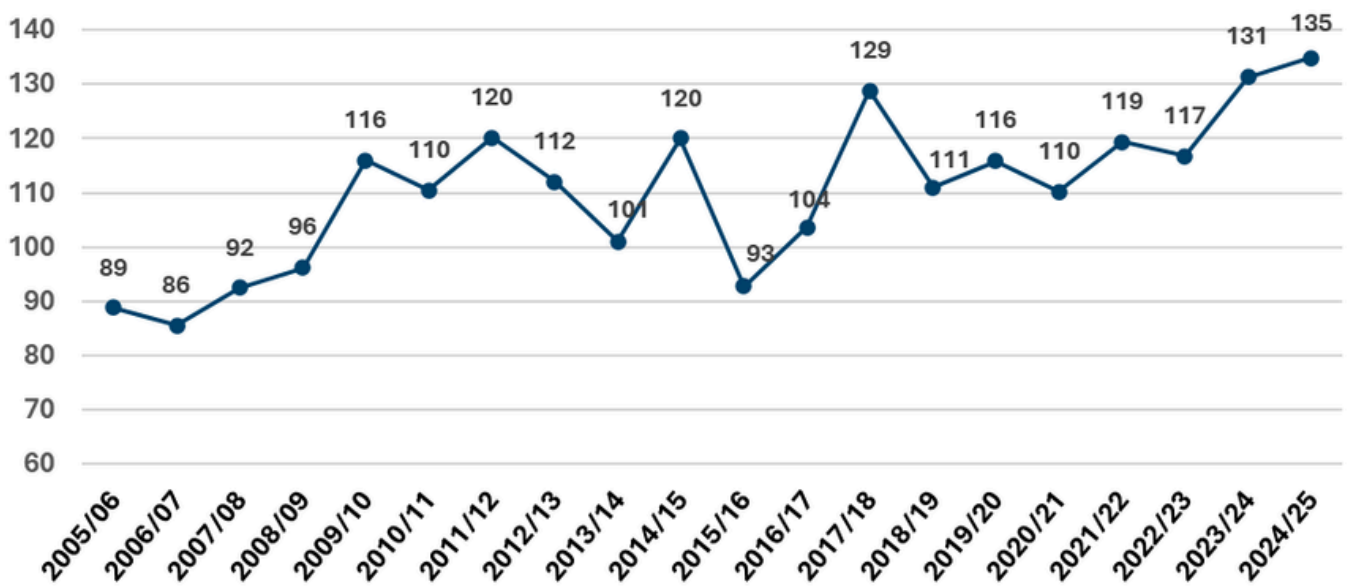


Photo Credit: Pfeifer & Langen GmbH & Co. KG

## 6. CAMPAIGN LENGTH

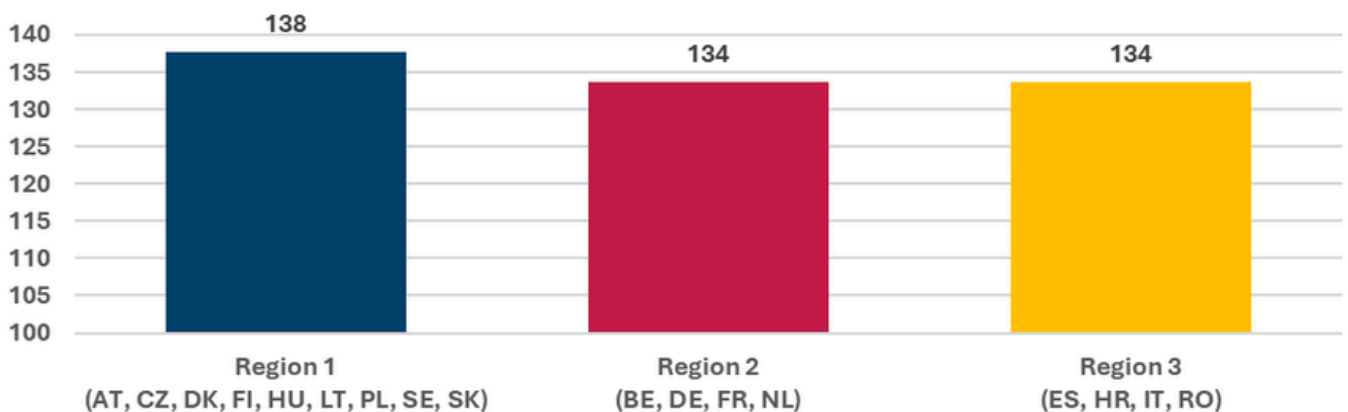
The processing campaign has lengthened significantly over recent decades as European sugar producers seek to strengthen competitiveness. In 2024/25 the average campaign length reached 135 days. Longer campaigns allow for more efficient factory capacity utilisation, leading to better fixed-cost distribution.

**Figure 10:** Average campaign length in the EU27 over the last 20 years (in days)



On average, campaigns were longer in Region 1 (Northern, Central, and Eastern Europe), while the remaining two blocs averaged 134 days.

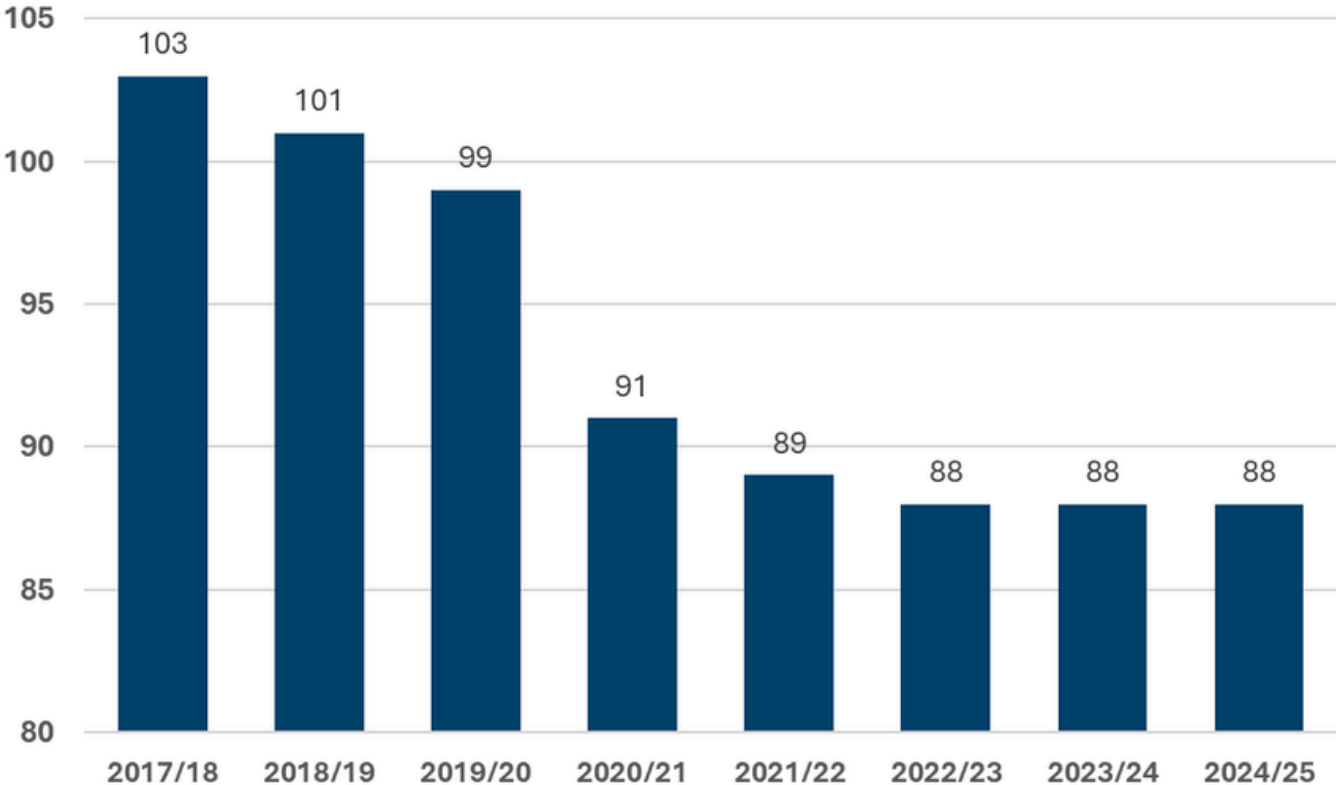
**Figure 11:** Average campaign length in EU regions in 2024/25 (in days)



# 7. FACTORIES

The post-quota decline in the number of EU beet sugar factories slowed from 2021/22. During 2024/25 the total number of operational factories remained stable at 88.

**Figure 12:** Number of EU beet sugar factories since the end of quotas



More than two-thirds of EU beet sugar factories are located in Germany, France and Poland.

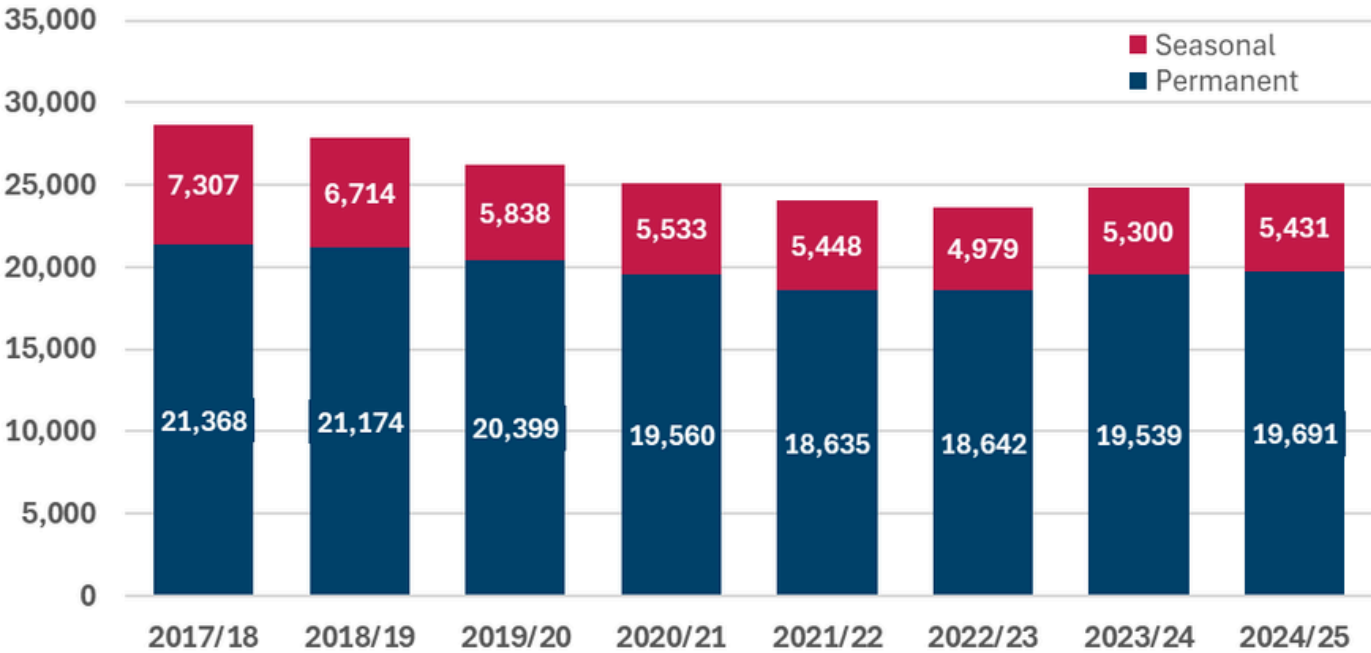
**Figure 13:** Number of EU beet sugar factories per Member State



# 8. EMPLOYMENT

Employment grew by 283 year-on-year. The last two campaigns have reversed the trend of a diminishing workforce observed since the end of quotas. Overall, a larger increase (2.5%) was seen in seasonal employment, though regional data makes it difficult to attribute this solely to longer campaigns. Seasonal employment grew by 30.8% in Region 1 but fell by 30.7% in Region 3, despite the latter recording the greatest increase in campaign length. As for permanent employment, it decreased in Region 1 (-1%), while growing in the two other regions (1.8% in Region 2 and 1.4% in Region 3).

**Figure 13:** Sugar industry employment during the beet processing campaign

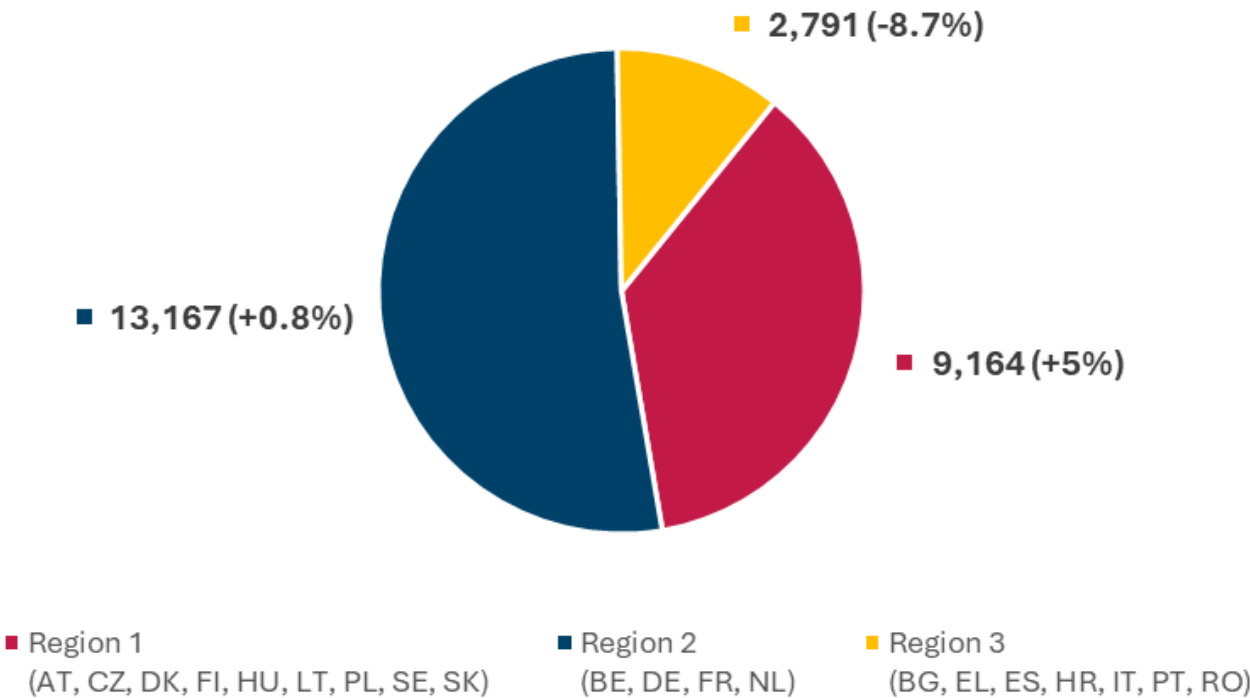


**Increase in the total number of employees year-on-year**

**283**

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
<b>Permanent</b>	21368	21174	20399	19560	18635	18642	19539	19691
<b>Seasonal</b>	7307	6714	5838	5532	5448	4979	5300	5431
<b>Total</b>	28675	27888	26237	25093	24083	23621	24839	25122

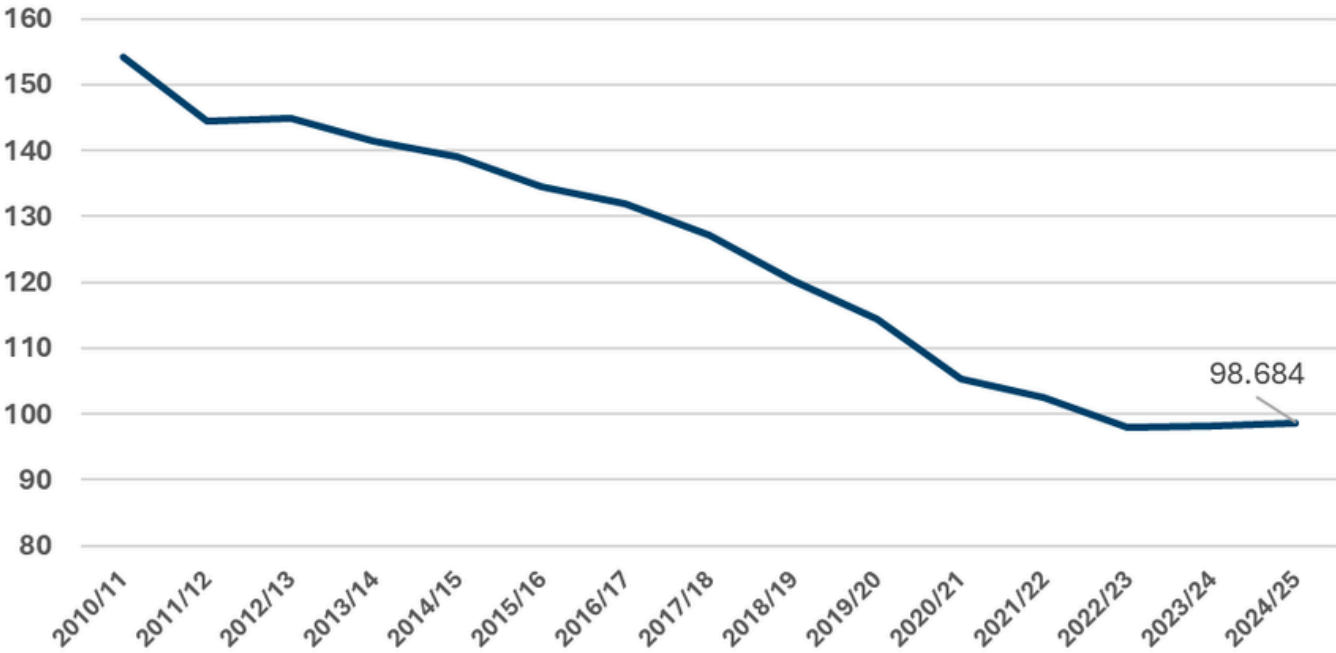
**Figure 15:** Sugar industry employment during the beet processing campaign by Region (and change YoY in brackets)



# 9. BEET GROWERS

In 2024/25 98,684 growers supplied beets to EU sugar factories, a slight increase from 98,070 in 2023/24. Region 1 and 2 saw a small change in the number of growers (+1.5% and -1.1% respectively), while this number rose significantly in Southern Europe (+12.3% in Region 3).

**Figure 16:** Number of beet growers in the EU over the last 15 years (in thousands)



**98,684**



**growers supplied beets to EU  
sugar factories in 2024/25**

# 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.





## ANNEX

Harvested areas for beet sugar production (thousand ha)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	1,239	1,344	1,567	1,533	1,449	1,413	1,409	1,394	1,405	1,507	1,426	7.3%
EU14	925	987	1,175	1,137	1,063	1,016	1,015	1,052	1,002	1,078	1,033	7.5%
EU13	314	357	392	395	386	397	394	343	403	429	393	6.6%
Region 1 (AT, CZ, DK, FI, HU, LT, PL, SE, SK)	376	424	462	463	444	463	473	428	486	519	473	6.8%
Region 2 (BE, DE, FR, NL)	745	798	976	962	905	862	849	898	836	887	866	6.1%
Region 3 (ES, HR, IT, RO)	118	123	130	108	100	89	87	68	84	102	86	21.7%

Paid beet (million tonnes)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
EU27	85.0	98.4	126.6	102.0	104.1	95.8	110.4	100.0	110.7	118.0

Beet sugar production (thousand tonnes)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	13,709	15,358	19,638	16,230	15,988	14,230	16,255	14,294	15,427	16,368	15,315	6.10%
EU13	2,661	3,641	3,842	3,410	3,245	3,143	3,570	3,058	3,546	3,836	3,431	8.19%
EU14	11,048	11,717	15,796	12,820	12,743	11,086	12,685	11,236	11,881	12,531	11,884	5.48%
Region 1	3,465	4,529	4,672	4,175	4,016	4,015	4,545	4,041	4,461	4,964	4,405	11.28%
Region 2	8,767	9,300	13,695	11,213	11,099	9,377	10,920	9,738	10,271	10,697	10,201	4.15%
Region 3	1,477	1,529	1,271	842	873	838	791	516	695	707	709	1.68%

Average sugar yield (t/ha)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	10.91	11.48	12.92	10.88	11.40	10.46	11.87	10.50	11.31	11.21	11.07	-0.96%
EU13	8.46	10.26	9.91	8.74	8.49	8.05	9.23	8.95	8.90	9.19	8.86	3.28%
EU14	11.58	11.98	13.66	11.45	12.15	11.14	12.62	10.92	12.03	11.82	11.71	-1.76%
Region 1	7.93	9.54	9.23	8.22	8.13	7.67	8.81	8.51	8.43	8.72	8.43	3.43%
Region 2	11.90	12.28	14.06	11.71	12.32	11.08	12.87	11.02	12.33	12.09	11.88	-1.94%
Region 3	9.95	10.11	10.75	8.72	9.89	10.48	9.74	8.12	8.89	7.94	9.03	-10.64%



Average sugar content (%)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	17.71	17.62	17.39	18.01	17.31	16.74	17.36	17.20	16.36	16.18	16.77	-1.12%
EU13	17.19	16.99	17.02	17.33	16.72	15.59	17.32	16.49	15.93	15.72	16.21	-1.30%
EU14	17.84	17.83	17.48	18.21	17.47	17.11	17.37	17.39	16.49	16.32	16.94	-1.04%
Region 1	17.51	17.34	17.13	17.53	16.76	15.93	17.42	16.72	16.23	15.90	16.44	-1.99%
Region 2	18.04	18.01	17.67	18.49	17.68	17.19	17.38	17.46	16.51	16.41	16.99	-0.63%
Region 3	15.89	15.74	15.49	14.93	15.58	16.01	16.76	16.03	15.11	14.80	15.74	-2.05%

Campaign length (days)	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	92.82	103.63	128.79	110.93	115.87	110.26	119.37	116.79	131.34	134.81	122.51	2.63%
EU13	89.82	112.74	122.86	114.37	107.59	114.97	120.16	108.44	133.44	138.98	123.20	4.15%
EU14	94.72	102.12	131.60	111.48	118.02	108.92	119.14	119.06	130.72	133.53	122.27	2.15%
Region 1	91.86	115.44	123.00	112.29	109.35	117.16	119.89	111.88	131.76	137.61	123.66	4.44%
Region 2	96.32	101.25	134.42	112.87	120.31	108.65	120.30	119.64	131.65	133.58	122.76	1.47%
Region 3	74.33	83.11	89.38	78.98	89.96	95.11	103.55	101.33	124.18	133.59	111.55	7.58%

Factories	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
EU27	104	102	103	101	99	91	89	88	88	88
EU13	37	37	37	36	35	34	32	31	33	33
EU14	67	65	66	65	64	57	57	57	55	55
Region 1	36	36	36	36	35	35	35	35	35	35
Region 2	50	50	50	50	50	44	44	44	42	42
Region 3	18	16	17	15	14	12	10	9	11	11

Growers	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	134,601	131,864	127,147	120,179	114,393	105,374	102,528	97,909	98,070	98,684	100,513	0.63%
EU13	37,776	37,350	37,765	36,338	33,474	31,945	29,805	26,443	28,481	28,975	29,130	1.73%
EU14	96,825	94,514	89,382	83,841	80,919	73,429	72,723	71,466	69,589	69,709	71,383	0.17%
Region 1	46,319	45,504	44,898	42,203	39,129	37,242	36,120	32,585	34,265	34,764	34,995	1.46%
Region 2	70,078	69,715	67,907	67,057	65,927	60,920	59,697	59,469	57,420	56,769	58,855	-1.13%
Region 3	17,843	16,292	13,989	10,670	9,119	7,041	6,558	5,716	6,216	6,982	6,503	12.32%



Employment during the processing campaign	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	26,904	27,637	28,675	27,888	26,237	25,093	24,083	23,621	24,839	25,122	24,552	1.14%
EU13	8,598	9,472	9,561	9,481	8,461	8,404	7,912	7,572	8,039	7,872	7,960	-2.08%
EU14	18,306	18,165	19,114	18,407	17,776	16,689	16,171	16,049	16,800	17,250	16,592	2.68%
Region 1	9,046	8,980	9,151	9,126	8,337	8,469	8,433	8,509	8,725	9,164	8,660	5.03%
Region 2	12,958	12,783	13,939	13,936	13,644	12,848	12,555	12,563	13,058	13,167	12,838	0.83%
Region 3	4,900	5,874	5,585	4,826	4,256	3,776	3,095	2,549	3,056	2,791	3,053	-8.67%

Employment between processing campaigns	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	5 year average	YoY change
EU27	19,808	20,797	21,368	21,174	20,399	19,560	18,635	18,642	19,539	19,691	19,213	0.78%
EU13	6,077	6,985	7,030	7,049	6,635	6,534	6,183	6,009	6,316	6,253	6,259	-1.00%
EU14	13,732	13,812	14,338	14,125	13,764	13,026	12,452	12,633	13,223	13,438	12,954	1.63%
Region 1	6,714	6,750	6,903	6,946	6,680	6,693	6,691	6,958	7,074	7,005	6,884	-0.98%
Region 2	10,706	10,875	11,147	11,015	10,734	10,412	9,859	9,922	10,371	10,562	10,225	1.84%
Region 3	2,389	3,172	3,318	3,213	2,985	2,455	2,085	1,762	2,094	2,124	2,104	1.43%