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INTRODUCTION

The information in this document is arranged in three parts:

- the "analysis" part describes the market situation and the mechanisms of the market organization in the product;
- the "statistics" part gives most of the tables appearing for the product in the annual report on the agricultural situation in the European Union;
- the Council decisions on the agricultural prices provide a vital illustration of the Community's policy in this sector.

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DESCRIPTION OF THE MECHANISMS OF THE COMMON MARKET ORGANIZATION*

The sugar market organization came into operation on 1 July 1968 and was extended to include isoglucose in 1977 and inulin syrup in 1994. It is governed by Regulation (EEC) No 1785/81 and covers the following products: beet, cane, sugar, pulps, molasses, isoglucose and products of secondary processing. Regulation (EEC) No 133/94 renewed the production arrangements until the 1994/95 marketing year and included inulin syrup in the common market organization with effect from 1 July 1994.

The marketing year runs from 1 July to 30 June.

Expenditure on the sugar sector varies from one year to another, depending largely on the product's widely fluctuating world prices. In 1994, expenditure accounted for 6.3% of total EAGGF Guarantee spending, all borne by producers, except for the part corresponding to preferential imports (see point 2.2).

It should be pointed out that each year the Community imports 1.3 million t of preferential sugar under the agreement with the ACP (African, Caribbean and Pacific) countries, the overseas countries and territories and India, and is required to export an equivalent quantity of Community-produced white sugar, the cost of which is borne by the EAGGF, as is the net expenditure on other imports under special conditions, in particular those pursuant to the system for the preferential supply of raw sugar to Portuguese and Finnish refineries.

1. Economic background

Up to the 1993/94 marketing year, Community sugar production had been satisfactory for some years, with excellent yields and favourable weather conditions. In 1993/94, production rose to 16.2 million t in spite of a slight reduction (-3%) in the area sown, due to particularly favourable growth conditions in all parts of the Community with the exception of Greece, Ireland and Italy. For 1994/95, however, production estimates are down to 14.5 million t, due to irregular climatic conditions during this marketing year and in particular a prolonged drought during the beet growing period.

At world level, the deficit situation forecast for 1994 as a result of poor crops in several major exporting countries took place, which led to higher prices in this market: between 14 and 15 cents/pound raw sugar in February 1995, i.e. 38% higher than in July 1995 when prices were within the 10 to 11 cents/pound range. This tense situation should continue until the arrival of the new harvest.

* Translated from *Avant-projet de budget général des Communautés européennes pour l'exercice 1996*.

Consumption in the Community of Twelve stands at about 11.9 million t, a certain amount of which is used by the chemical industry (215 000 t in 1993/94).

As regards external trade, the Community of Twelve imports about 2 million t of sugar a year and exports some 5.6 million t, including 700 000 t in the form of processed products.

The degree of self-sufficiency for 1993/94 was 137% for all sugar (112% for quota sugar).

The production quotas of 907 186 t for sugar and 11 930 t for isoglucose fixed in the Act of accession for Austria, Finland and Sweden are to be seen in the light of a yearly consumption of 906 000 t for sugar and 12 000 t for isoglucose in these new Member States.

2. Operation of the market

2.1. Production quotas

This system consists of guarantees regarding prices and disposal for limited quantities of sugar production corresponding to the A and B quotas.

A and B sugar represent the quantity of sugar which the undertaking may produce and sell direct to the Community market and/or the world market (with refunds). The quotas are allocated to undertakings by the Member States. The sugar refineries conclude individual contracts with beet growers in accordance with the Community rules (minimum standards) and inter-branch agreements.

Production exceeding quotas, known as C sugar, cannot be marketed in the Community and must therefore be exported onto the world market without a refund before 31 December of the year following that in which the relevant marketing year ends.

However, to cushion the effects of annual variations in production, producers may carry over a quantity of C sugar to the following marketing year¹, up to a maximum of 20% of their A quota. This sugar must be stored for 12 months. This sugar thus forms part of production under the A quota for the following marketing year.

¹ The carryover arrangements are governed by Article 27 of Regulation (EEC) No 1785/81, which lays down that the quantity being carried over must be notified to the Member State concerned by 1 February.

2.2. Producers' financial responsibility

Since 1986/87 producers have borne the full financial responsibility for the disposal of their production surpluses, on an annual basis. Producers' responsibility covers the costs of disposal of the fraction of their production quota exceeding internal consumption. They are not, therefore, required to bear the cost of Community expenditure relating to exports arising from preferential agreements (ACP protocol on sugar, agreement on cane sugar with India and imports into Portugal) or on the production refunds for sugar used by the chemical industry up to a quantity of 60 000 t, the quantity traditionally established before Council Regulation (EEC) No 1010/86 applied the financial responsibility of producers for quantities exceeding that limit.

2.2.1. Production levy

Producers first of all pay a basic production levy amounting to 2% of the intervention price on their A and B quota and a B levy of up to 37.5% of their B quota. If these standard levies are not sufficient to cover the costs of disposing of the corresponding surpluses during the marketing year, the Commission fixes a supplementary levy by applying a standard coefficient to the basic levies, to establish additional payments to be borne by producers. The standard levies are payable twice a year (May and December) and the supplementary levy together with the final balance, in December. Sugar manufacturers and beet growers share the cost of the levies according to the proportion to which they obtain income from sugar (40% : 60%).

2.2.2. Storage levy and equalization scheme

To ensure a regular flow of sugar from the manufacturer to the consumer at a steady price, the costs of keeping sugar (storage, financing, etc.) are reimbursed monthly at a fixed rate. To keep the system financially neutral as far as the Community budget is concerned, a storage levy is charged at the time of marketing by the manufacturer, calculated to cover the monthly reimbursements. The Council fixes the amount of the reimbursement each year. It currently stands at ECU 0.48/100 kg per month for the 1994/95 marketing year.¹

The storage levy is fixed by the Commission having regard to the quantities of sugar covered by the scheme and the average number of months for which the sugar is stored before release to the retail sector. Manufacturers pass on the storage levy to their customers in such a way that the actual market support price in the Community represents the intervention price plus the storage levy.

¹ Due to falling interest rates, this amount was fixed at ECU 0.45/100 kg for 1995/96.

2.3. Price arrangements

Each year the Council fixes two categories of price:

- beet prices,
- sugar prices.

2.3.1. Beet prices

- (a) **Basic price:** This is fixed in the light of the intervention price for white sugar and standard amounts representing the processing margin, the yield, the undertakings' receipts from sales of molasses and, where appropriate, the cost incurred in delivering beet to undertakings.
- (b) **Minimum price:** Each year, minimum prices are fixed for A beet and B beet (that is, any beet processed into A sugar or B sugar respectively).

The minimum price for A beet is equal to 98% of the basic price for beet, whilst the minimum price for B beet is in principle 68% of the said basic price but may be set as low as 37.5% as required.

For areas for which a derived intervention price for white sugar is fixed, the minimum prices for A beet and B beet are increased by an amount equal to the difference between the derived intervention price for the area in question and the intervention price, such amount being adjusted by the coefficient 1.30.

When purchasing beet intended for processing into sugar, sugar manufacturers are required to pay at least the minimum price, adjusted by price increases or reductions to allow for deviations from the standard quality.

Where agreements within the trade have been approved by the Member State concerned, the two-tier minimum price system may be replaced by a single price (the "mixed price"), which represents a weighted average of the two minimum prices. This option is at present seldom used in the Community, except in Belgium and the Netherlands.

2.3.2. Sugar prices

- (a) **Target price:** This price is fixed each year for white sugar of the standard quality, to which the intervention price applies, unpacked, ex-factory, loaded onto a means of transport chosen by the purchaser. It is about 5% higher than the intervention price.
- (b) **Intervention price:** Each year an intervention price for white sugar of standard quality is fixed for the non-deficit areas and for the deficit areas (currently Spain, Finland, Italy, Portugal and the United Kingdom and Ireland).

An intervention price for raw sugar is also fixed annually on the basis of the intervention price for white sugar, taking account of flat-rate amounts for processing and yield.

- (c) Threshold price: Each year the Council fixes a threshold price for white sugar, raw sugar and molasses.

The threshold price for white sugar is equal to the target price plus the costs, calculated at a flat rate, of transport from the Community area having the largest surplus to the most distant deficit consumption area in the Community, with account being taken of the storage levy.

The threshold price for raw sugar is derived from that for white sugar, taking account of flat-rate amounts for processing and yield.

The threshold prices are intended to guarantee Community preference (import levies).¹

2.4. Specific market instruments

2.4.1. Import and export arrangements

Imports are subject to a levy when the world price is lower than the Community threshold price. Imports of preferential sugar cannot attract levies. Certain Portuguese imports of raw sugar are subject to reduced levies.

Refunds may be granted on exports when the world price is lower than the Community price. If the Community price is lower than the world price, as was the case from April 1980 until May 1981, an export levy is charged.

In application of the Uruguay Round GATT agreement in the sugar sector, as from the marketing year 1995/96 levies are replaced by import duties and the existing quantitative and budgetary restrictions for exports with refunds have been strengthened.

2.4.2. Storage

Public storage: the intervention agencies are required to buy in all sugar offered at the intervention price. After being bought in, the sugar remains in storage in the refinery's storerooms and silos, with the offerers assuming responsibility for it. Very little use is made of intervention for sugar as surpluses are exported.

¹ The threshold prices and the levies have been abolished as from 1 July 1995 (see point 2.4.1.).

Specialized traders and manufacturers are reimbursed, at fixed rates, for the cost of storing sugar, such compensation being financed by the levy payable by producers on disposal (see 2.2.2.).

2.4.3. Production refunds

This aid for the manufacture of certain chemical products is designed to put the manufacturers concerned on an equal footing with their counterparts using sugar from the world market.

2.4.4. Measures to aid the disposal of raw sugar

These are subsidies towards the shipping and refining costs incurred in respect of sugar from the French overseas departments refined in "pure" refineries in the Community. They may, in order to ensure that those refineries obtain sufficient supplies, also be granted for raw beet sugar.

2.4.5. Other measures

An adaptation aid was made available for the refining of preferential sugar up to 1994/95, accompanied by additional refining aid for raw sugar from the French overseas departments and some raw beet sugar, with a view to restoring balance between prices for this sugar and preferential sugar, and also for raw sugar imported with a reduced levy and refined in Portugal and Finland. There was a Community contribution of 25% towards the national aid of ECU 0.45 per 100 kg for the refining of preferential raw cane sugar in the United Kingdom authorized for the period up to 1994/95. Lastly, following the early alignment of prices in Spain on 1 January 1993, transitional aids are being granted to beet and cane producers in that Member State for the period 1993/94 to 1994/95, together with a Community contribution of 50% towards the adaptation aid granted to sugar-producing undertakings for the period 1993/94 to 1995/96.

2.5. Reform of the common market organization

In April 1995, the Council decided upon the following amendments of the common market organization for sugar applicable from the 1995/96 marketing year¹:

- implementation of a new system of potential reductions of the production under guarantee of quotas, in order to comply with the commitments entered into under the agricultural agreement resulting from the Uruguay Round multilateral trade negotiations (GATT), by applying coefficients laid down per product, Member State, and A and B quotas;

¹ Regulation (EC) No 1101/95 of 24 April 1995, OJ No L 110 of 17.5.1995.

- strengthening of the system of preferential imports of raw sugar in order to guarantee supply security for all port refineries in the European Union, through an agreement to be negotiated with the APC States and/or other suppliers of raw sugar for six marketing years;
- revision and additional reduction of national aid authorized in Italy, Spain, and the United Kingdom;
- maintenance of the existing level of production quotas for another six marketing years, i.e. up to 2000/2001;
- maintenance of the sector's self-financing scheme for the same period.

Trends of appropriations*

(ECU)

Article	Heading	Appropriations 1995	Appropriations 1996
B1-110	Refunds on sugar and isoglucose	1 225 000 000	1 453 000 000
B1-111	Interventions for sugar	564 000 000	438 000 000
TOTAL OF CHAPTER B11 (Sugar)		1 789 000 000	1 891 000 000

* For 1995, amounts refer to approved appropriations; for 1996, requested appropriations.

THE SITUATION OF THE MARKETS*

The basic situation on the world sugar market changed completely during the course of the 1994/95 marketing year. Initial harvest estimates for the year indicated a production shortfall in relation to consumption of around 2 million tonnes but this finally turned into a surplus which is currently estimated at 1.5 million tonnes. Stocks, which at the beginning of the marketing year were hovering around the level considered as the point of equilibrium (30% of consumption), were 33.3% of estimated consumption for the marketing year.

World market trends

(million tonnes of raw sugar)

	Production	Consumption	Surplus or deficit	Stocks as % of consumption
	(1)	(2)	(3) = (1) - (2)	(4)
1985/86	98.6	100.5	- 1.7	38.4
1986/87	104.2	105.9	- 1.7	33.8
1987/88	104.7	107.2	- 2.5	31.1
1988/89	104.6	107.0	- 2.4	29.1
1989/90	109.1	109.4	- 0.3	28.2
1990/91	115.7	110.3	+ 5.4	32.0
1991/92	116.8	111.0	+ 5.8	36.3
1992/93	112.6	111.5	+ 1.1	36.2
1993/94	110.9	113.0	- 2.1	32.7
Forecast 1994/95	116.1	114.6	+ 1.5	33.3

Source: F.O. Licht

Nevertheless, and despite an increase of 1.3 million tonnes in the world level of stocks at the end of the marketing year, world market prices increased in 1994/95 compared with 1993/94. These price trends were the result of the slow reaction, particularly on the part of India, to this development in the world supply balance, the pressure on the world markets for white sugar caused by the reduction of around 1 million tonnes in supplies compared with the previous marketing year and, finally, the delivery problems encountered by Brazil as a result of the delay in determining its export policy and the small capacity of its ports.

AVERAGE SPOT PRICE:	
Paris Exchange (white sugar) =	ECU 26.79/100 kg in 1993/94
	ECU 30.94/100 kg in 1994/95 (+15.5%)
New York Exchange (raw sugar) =	ECU 20.37/100 kg in 1993/94
	ECU 23.68/100 kg in 1994/95 (+16.2%)

* Extract from *The agricultural situation in the European Union. 1995 report.*

The big harvests in Brazil (12.5 million tonnes), Thailand (5.5 million tonnes) and, in particular, in India (15.8 million tonnes) were the cause of the change in the world supply balance in 1994/95. These high production levels were the result of increases in the area sown and/or good growing conditions. India again became an unpredictable factor on the world market. Despite excellent prospects of a good harvest, it was only at the end of the 1994/95 marketing year that the Indian Government stopped imports.

For the third successive year, there were poor harvests in Cuba and China. Cuba was again around 240 000 tonnes short of planned deliveries (1.0 million tonnes) under its barter agreement with Russia but that did not prevent the signing of a new protocol between the two countries for the 1995/96 marketing year involving a quantity of sugar similar to that for 1994/95. In China, sugar production is falling as crops other than cane and beet offer a better income to farmers. China has become a big buyer of sugar on the world market over the past two marketing years and should remain so, although to a lesser extent, in 1995/96.

World import demand remained practically the same as in 1993/94. The current estimate of 32.9 million tonnes for 1994/95, however, only represents 28.30% of total production compared with 29.0% the previous marketing year. Despite the stability in the volume of world trade, the downward trend in import demand since 1988/89 (33% of total production) was confirmed in 1994/95. World consumption, as in 1993/94, increased by around 1% over the previous marketing year but this is still weak compared with the 1.5% annual growth in world population and indicates a fall in per capita consumption.

Attention should be drawn to the role played by the continuing reduction in domestic demand in Eastern Europe and particularly in the CIS which imported around 2.5 million tonnes in 1994/95 compared with 5.0 million tonnes in 1992/93. Following large imports of white sugar during that marketing year, prices on the world market and the introduction in Russia of a 25% duty on imports of white sugar virtually put an end to exports of white sugar to Russia. The exhaustion of stocks and the prospects for prices on the world market during 1995/96 could reopen the Russian market for Community deliveries.

Initial estimates for the 1995/96 harvest again indicate a surplus of production over world consumption. Current estimates point to an increase of around 2.0 million tonnes in stock levels. At first sight, given the close link between stock levels and world prices, the prospects for prices do not appear good. Nevertheless, the growth of demand in Russia and China, Indian export policy and storage capacity within the EU could help maintain the stability of world market prices, at least during the first half of the 1995/96 marketing year.

Areas under beet in the Union (EUR 12) in 1994 (1 890 000 ha) again fell (-2.2%) compared with the previous marketing year. Average sugar yield was 7.56 tonnes per hectare, a fall of 8.4% compared with 1993 caused by particularly bad growing conditions during the season. These low yields resulted in a total production, in white sugar equivalent, of 14.512 million tonnes, of which 14.281 million tonnes came from beet, 0.212 million tonnes from cane and 0.019 million tonnes from molasses.

Of that production, around 2.8 million tonnes of unprocessed Community sugar was exported with a refund, a figure similar to that for the previous marketing year. On the other hand, with total production down compared with 1993/94, exports of C sugar fell by around 1.0 million tonnes to approximately 1.98 million tonnes. The carryover of C sugar was also sharply down (-57%) on the previous marketing year at 0.54 million tonnes.

Community sugar production and the Community sugar market are subject to a system of production quotas which the Council, by Regulation (EC) No 1101/95, extended, with only minor changes, for six marketing years, i.e. until 2000/2001. Special arrangements for the supply of raw sugar to Community refineries in Finland, France, Portugal and the United Kingdom were also introduced for that same period. Finally, special measures on production quotas were introduced to permit fulfilment of the commitments made in the Agreement on Agriculture concluded during the Uruguay Round multilateral trade negotiations.

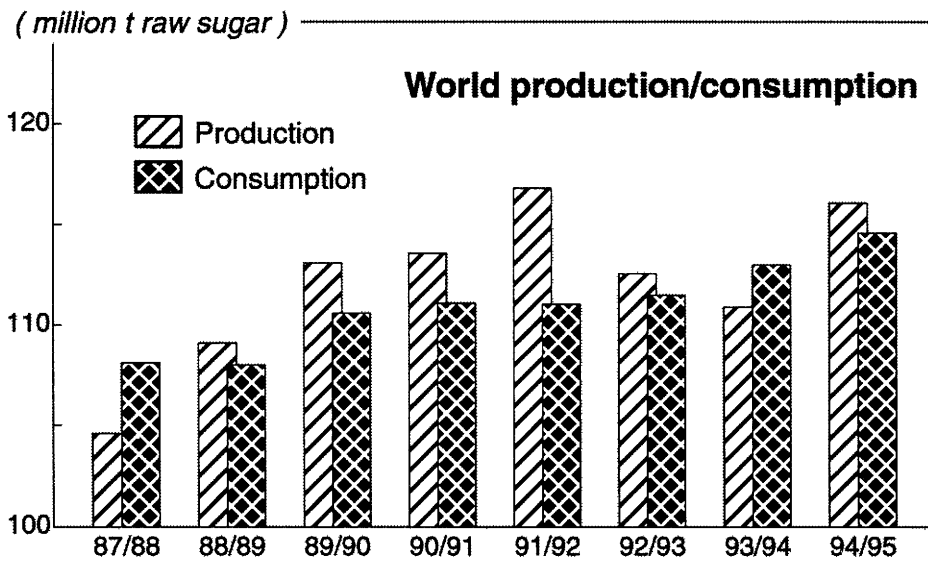
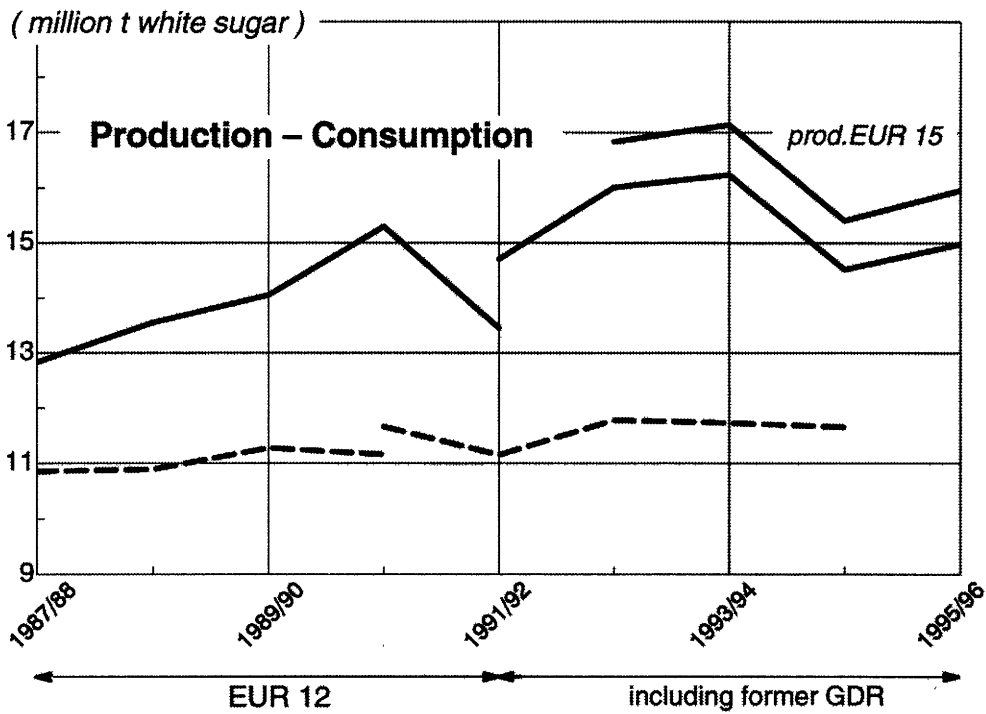
Following the new enlargement of the Union on 1 January 1995, the three new Member States (Austria, Finland and Sweden) received the following production quotas for sugar and isoglucose:

Member State	Basic quantity A		Basic quantity B	
	Sugar (1)	Isoglucose (2)	Sugar (1)	Isoglucose (2)
Austria	316 529.0	-	73 881.0	-
Finland	133 433.0	10 845.0	13 343.0	1 085.0
Sweden	336 364.0	-	33 636.0	-

(1) in tonnes of white sugar

(2) in tonnes of dry matter

Sugar



Source: European Commission, DG for Agriculture.

COUNCIL PRICE DECISIONS

The Council decided to freeze the basic price for beet, the intervention price for white sugar and the manufacturing margin.

This proposal relates to the basic price for beet and to the minimum prices for A beet and B beet, which depend ultimately on the ceiling fixed for the basic production levy and for the B levy, the latter subject to a subsequent increase in the ceiling in accordance with Article 28 of Regulation (EEC) No 1785/81.

Of the three new Member States, only Finland can be considered a deficit area within the meaning of Article 3(1)(b) of Regulation (EEC) No 1785/81. The Council therefore decided to fix a derived intervention price for that country. In order to fix this price, the Council decided to use the same derivation factor it used to determine the derived intervention price for the deficit areas of the United Kingdom, Ireland and Portugal. On this basis, the derived intervention price for white sugar for Finland will be set at ECU 64.65/100 kg.

As far as the reimbursement of storage costs is concerned, the Council decided that the amount of the monthly refund be reduced from ECU 0.48/100 kg to ECU 0.45/100 kg, to take account of the drop in interest rates.

Price decisions in ecus

		1994/95	1995/96
1. Basic price for beet	t	47.67	47.67
2. Minimum price for A beet (1)	t	46.72	46.72
3. Minimum price for beet (2)	t	32.42	32.42
4. Intervention price for white sugar	q	63.19	63.19
5. Target price for white sugar	q	66.50	66.50
6. Intervention price for raw sugar	q	52.37	52.37
7. Monthly reimbursement of storage costs	q	0.48	0.45

- (1) 98% of the basic price for beet
- (2) 68% of the basic price for beet, except where Article 28(5) of Regulation (EEC) No 1785/81 is applied.

STATISTICAL TABLES*

Sugar supply balance (October/September)

EUR 15

	1 000 t white sugar				% TAV
	1991/92 (4)	1992/93 (4)	1993/94 (4)	1994/95	<u>1994/95</u> 1993/94(4)
1	2	3	4	5	6
Total production	14703	16012	16216	15402	-5,0
of which: C sugar production for export	1573	2265	2918	1995	-31,6
Usable production (1)	13130	13747	13298	13407	0,8
Change in stocks	-321	223	78	-856	x
Imports (2)	1922	1979	2077	2288	10,2
Exports (1) (2)	3407	3564	3674	3834	4,4
Intra-EU trade	(1591)	(1240)	(1432)	(1450)	1,3
Internal use	11966	11939	11623	12717	9,4
of which :					
- animal feed	10	10	11	10	-9,1
- industrial use	179	174	213	182	-14,6
- human consumption	11777	11755	11410	12525	9,8
Human consumption (kg/head) (3)	34,2	33,9	32,8	33,8	3,0
Self-sufficiency (%) (1)	109,7	115,1	119,8	112,9	-5,8

Source : European Commission, Directorate-General for Agriculture.

(1) Excl. C sugar.

(2) Excl. sugar traded for processing.

(3) Ratio of human consumption to resident population at 1 January.

(4) EUR 12.

* Extract from *The agricultural situation in the European Union. 1995 report.*

Area under sugarbeet (1), yield (2) and production (2) of sugar

	Area						Yield						Production						
	1 000 ha		t/ha		% TAV		t/ha		% TAV		1 000 t		% TAV						
	1993/1994	1994/1995	1995/1996	1994/1995	1995/1996	1994/1995	1995/1996	1992/1993	1993/1994	1994/1995	1995/1996	1992/1993	1993/94	1994/1995	1995/1996	1994/1995	1995/1996	1994/1995	1995/1996
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16				
EUR 15	2102	2067	2027	2068	2,0	8,01	8,29	7,48	7,60	1,6	16831	17133	15402	15958	3,6				
Belgique/België	106	104	101	104	3,0	8,42	10,00	8,58	8,75	2,0	893	1043	867	910	5,0				
Danmark	65	67	67	67	0,0	6,32	7,77	6,69	7,25	8,4	411	521	448	486	8,5				
BR Deutschland (3)	552	530	506	520	2,8	7,30	8,18	7,21	7,28	1,0	4049	4352	3666	3803	3,7				
Eládá	50	46	40	44	10,0	7,10	6,65	6,25	6,82	9,1	354	307	250	300	20,0				
España (5)	162	179	170	188	-1,2	5,83	6,85	6,53	5,71	-12,6	955	1234	1118	970	-13,2				
France (4)	439	410	405	423	4,4	9,90	10,60	9,92	9,85	-0,7	4634	4589	4223	4365	3,8				
Ireland	32	32	36	35	-2,8	6,97	5,52	5,92	6,11	3,2	223	177	213	214	0,5				
Italia	283	280	280	275	-1,8	6,60	5,07	5,32	5,87	6,6	1868	1419	1492	1580	4,6				
Nederland	121	116	115	116	0,9	9,51	9,76	8,40	9,00	7,1	1150	1133	966	1044	8,1				
Osterreich	51	54	52	52	0,0	7,88	8,15	7,52	8,04	6,9	402	440	391	418	6,9				
Portugal (5)	0	0	0	1	x	-	-	-	7,00	x	2	4	6	7	16,7				
Suomi/Finland	32	32	32	35	9,4	4,75	4,50	5,00	4,49	-10,2	152	144	160	157	-1,9				
Sverige	39	48	53	53	9,4	6,97	7,09	6,40	6,97	8,9	265	333	339	404	19,2				
United Kingdom	170	169	170	170	0,0	8,66	8,50	7,43	7,65	3,0	1473	1433	1263	1300	2,9				
EUR 12	1980	1933	1890	1923	1,7	7,89	8,25	7,68	7,79	1,4	16012	16216	14512	14979	3,2				

Source : European Commission, Directorate-General for Agriculture.

(1) Area planted with sugarbeet exclusive of area planted for distillery supply.

(2) In terms of white-sugar value.

(3) Including production of molasses.

(4) Area and yield, metropolitan France only; including the French overseas departments.

(5) Including production of sugar from sugar cane.

European Commission

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