



WABCG/ISO Consultation

25 November 2024

**WIFI :
CHW-GUEST
Westminster1**



WABCG/ISO Consultation
Session 'Around the World'
25 November 2024

WABCG/ISO Consultation

Around the World



Chairman : David Thompson, President, WABCG

Rules :

- Use your own language: you will be translated!
- 20 countries : no more than 3 minutes per speech!





Eswatini

(Former Swaziland)



Eswatini

Eswatini Cane Growers Association





Campaign run from **APRIL** to **NOVEMBER**
47 % of the beet/cane is grown by independent growers
435 independent cane/beet growers
3 factories
On average, a **farmer grows 67 ha of cane/beet**

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	58 840	58 680	-
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	87.6	95.0	-
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	10.0	11.1	-
Total sugar production of the country <i>(metric ton)</i>	587 210	634 751	-
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	-



- Sugar deficit in Southern Africa Customs Union led to better prices
- Extreme weather patterns (floods, hailstorms) frequency in upward trend
- Emerging diseases and pests e.g. yellow sugarcane aphid (YSA)

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Around the World



France



France

Confédération Générale des Planteurs de Betteraves



 Campaign run from **October to September**
23 000 independent beet growers
20 factories (5 entities)
On average, a farmer grows 17 ha of beets

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	379 000ha	410 000 ha	± 0 % ?
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	83 t at 16°	78 ± 1 t at 16°	New 5 ya = 77.2 t/ha <i>(vs. 88.9 in 2019!)</i>
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	12.1	11,3 ± 1 t	New 5 ya = 11.2 t/ha <i>(vs. 13.1 in 2019!)</i>
Total sugar production of the country <i>(metric ton)</i>	4.2 Mt	4.3 Mt	
Total ethanol production of the country, from beet/cane <i>(m³)</i>	Approx. 900,000	Approx. 900,000	

France

Confédération Générale des Planteurs de Betteraves



✓ We are now harvesting sugar beets...

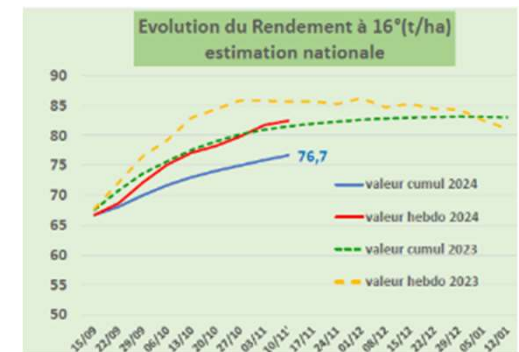
- A disappointing year for sugarbeet
 - *Sowing too late*
 - *Vegetative period too wet*
 - *High Cercospora pressure*
- And still no tools to fight aphids (acetamiprid) + new pests emerging!

✓ Sugar beet Prices:

- Sugar factories did not contract any price for the 2025 sowing: the price risk only relies on growers...
- Cost of production are now > 35 €/t (+10 €/t within the last 10 years!) :
 - *Lower yield (Less PPP, Climate change...)*
 - *Higher cost (Less PPP, Decarb. fertilizers, Ukraine war...)*
- In a context of very low incomes (2024: bad cereals yield with low prices...)

✓ November: new farmers mobilisations:

- Mercosur:
 - *190,000 t of sugar: the equivalent of one French factory to be closed in Europe (already 5 out of 25 closed within the last 5 years).*
 - *82 Ml of bioethanol: the equivalent of the French bioethanol production every year!*
- Ukraine: already 0.9 Mt imported since 2022! *"Farmers can't afford to pay for the war"*



Next speaker : Germany

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Around the World



Germany



Germany

ADR (Working Group of German Beet Growers Associations)



 Campaign run from September to February
100 % of the beet is grown by independent growers
21.700 independent beet growers
18 factories
On average, a farmer grows 18 ha of beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	364.519	385.493	~350.000
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	81,8	85,5	-
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	13,4	14,6	-
Total sugar production of the country <i>(metric ton)</i>	4.223.000	4.950.618	-
Total ethanol production of the country, from beet/cane <i>(m³)</i>	64.000	67.000	-

Germany

ADR (Working Group of German Beet Growers Associations)



- **Growing season 2024:** Long sowing (last beet end of May) because of wet conditions in spring. Growing conditions in summer mostly good. High pressure of leaf diseases from late summer on. Regional problems with Syndrome Basses Richesses and Stolbur. Long campaign is expected because of extended area and high beet yields.
- **Market conditions:** Sugar prices are declining. Beet prices 2024/25 probably lower than last year. Beet area in 2025 will be reduced by about 10 percent to stabilize sugar market situation.
- **What else:**
 - Research projects are initiated to find out more about the new diseases Syndrome Basses Richesses and Stolbur.
 - Since last year the Conviso-System (beet variety + herbicide) is allowed to be used in Germany.
 - Sustainability requirements are one big issue coming towards beet growers.

Next speaker : Mauritius



Mauritius



MAURITIUS

MAURITIUS SUGAR SYNDICATE



 Campaign run from June to December
55 % of the cane is grown by independent growers
8,000 independent cane growers
3 factories
On average, a farmer grows 4.4 ha of cane

	2023/2024	2024/2025 (EST.)	2018-22 Average
Acreage dedicated to cane or beet <i>(ha)</i>	35,863	36,018	43,508
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	68.4	71.1	64.9
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	6.66	6.52	6.50
Total sugar production of the country <i>(metric ton)</i>	238,854	235,000	282,782
Total ethanol production of the country, from beet/cane <i>(m³)</i>	12,500	14,000	-



- Growing impact of climate change on yields: too much or too less rain;
- With less rain, precautionary measures taken to avoid field irrigation, hence double impact;
- Serious shortage of manual labour, including contractors and hauling companies
- Anticipating decrease in net price payable to producers in 2024 (20-25% compared with 2023)

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Around the World



Mexico



MEXICO

UNION NACIONAL DE CAÑEROS, AC CNPR





Campaign run from November to May
>95 % of the cane is grown by independent growers
180,000 independent cane/beet growers
49 factories
On average, a farmer grows 4 to 6 ha of cane

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	746,000	747,000	784,000 <i>(5-year average)</i>
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	62	63	63.5 <i>(5-year average)</i>
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	6.3	6.82	6.88 <i>(5-year average)</i>
Total sugar production of the country <i>(metric ton)</i>	4'700,000	5'090,000	5'400,000
Total ethanol production of the country, from beet/cane <i>(m³)</i>	N/A	N/A	N/A

MEXICO

UNION NACIONAL DE CAÑEROS, AC CNPR

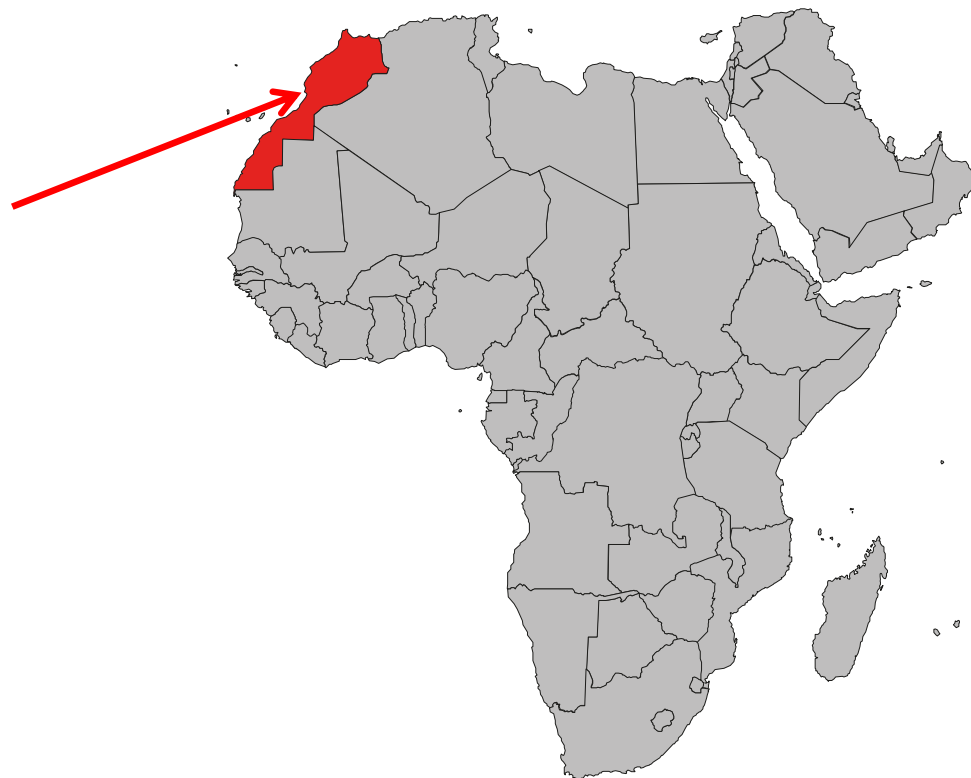


- Zafra 23-24, adverse weather conditions. Poor results, mainly due to less sucrose content. Production fell 10% from previous season. High domestic prices resulted in huge sugar imports (700K tonnes. High Ending Stocks. Domestic Prices Plummeted.
- Zafra 24-25, a better rain season. First estimates preview a mild recovery (10% more sugar), Domestic Prices are still low. Main challenge are being efficient in Domestic Marketing and a well planned displacement of surplus to world market (400k to 600k tonnes), otherwise Sugarcane price may see a huge reduction.
- Challenges: Improve social and economic condition of farmers and workers attending Generational Change; Machinery and Technology to releieve lack of labor; Financing for investment in Irrigation, New planting, Reasearch and Diversified coproducts.

Next speaker : Morocco



Morocco



MOROCCO

COSUMAR



Campaign run from September to July

Almost 100% of the beet/cane is grown by independent grower

8 factories (5 sugar beet factories, 2 sugar cane factories and 1 refinery)

On average, a farmer grows 3,7 ha of cane/beet



	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	- Beet : 22 762 - Cane : 6 000	- Beet : 45 000 - Cane : 6 000	
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	- Beet : 54 - Cane : 71	- Beet : 65 - Cane : 80	
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	- Beet : 8,7 - Cane : 9,0	- Beet : 10,2 - Cane : 10,0	
Total sugar production of the country <i>(metric ton)</i>	190 729	430 800	
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	



- **Drought Issue in Morocco**
- **Increase in Purchase Prices of Sugar Crops**
- **Support for agricultural inputs (fertilizers)**



Netherlands



The Netherlands

Royal Cosun



 Campaign run from September to January
8.000 beet growers in cooperative
2 factories
On average, a farmer grows 12,5 ha of beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	83.500	87.600	80.000
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	86,1	76,5	80
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	13,5	12,5	13,1
Total sugar production of the country <i>(metric ton)</i>	1.127.300	1.095.000	1.050.000
Total ethanol production of the country, from beet/cane <i>(m³)</i>	0	0	0



The Netherlands

Royal Cosun

- Spring 2024 was cold and very wet (after a wet fall and winter). Sowing continued until late June. This campaign, the yield differences within the fields, between the fields and regions are significant. Yields vary between less than 30 tons to more than 100 tons of beets per hectare. The extremely wet conditions in winter and spring had a major impact. In the first period of the campaign, the regrowth is also below average. Therefore, the yield forecast has been lowered by 2 tons. Current estimate is 76,5 tons beets per hectare. With a campaign average of 16,3% sugar content, the expected average sugar yield is 12,5 tons per hectare. This is 0,3 tons sugar per hectare less than previous forecast and 1,3 tons sugar less than five-year average. The campaign is progressing well with good harvesting conditions.
- Virus Yellow: No neonics since 2018! For 2024 we have an authority approval to use Batavia (spirotetramat)! The exemption for use was provided late on May 31 and only for the period June 1 - July 15. Although we have a nation-wide warning system, we can only reduce damage, if we can use plant protection. Impact seems low in 2024.
- Foliar and fungus diseases: in the last couple of years we see an increasing infestation of foliar, especially *Cercospora*. Last 3 years we had less damage of leave diseases. We developed the BAS app and a warning system with 700 sensors in the fields. For 2024 we have seen a higher infestation due to the wet conditions in the first half year and less vital plants.

Next speaker : Nicaragua

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Around the World



Nicaragua



NICARAGUA

ASOCIACION DE PRODUCTORES PRIVADOS
DE OCCIDENTE APRICO



 Campaign run from November to May
50 % of the beet/cane is grown by independent growers
300 independent cane/beet growers
4 factories
On average, a farmer grows 100 ha of cane/beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to sugar cane <i>(ha)</i>	72,656.04 HA	73,520.55 HA	
Plant yield in field <i>(metric ton of cane/ha)</i>	104.35 TM/HA	102.10 TM/HA	-
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	10.66 TM/HA	10.75 TM/HA	-
Total sugar production of the country <i>(metric ton)</i>	774,810.29 TM	790?081.6 TM	-
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	-



NICARAGUA

*ASOCIACION DE PRODUCTORES PRIVADOS
DE OCCIDENTE APRICO*

- Weather conditions: Rainy season Began with a lot of rainfall and high cloudiness, which delayed agricultural activities in the sugar cane plantations.
- The strategy of applying flowering inhibitor was carried out, to reduce the formation of cork in the cane stem, in this way mitigate agricultural and industrial losses
- In the first months of winter, there was the presence of spittlebug, which forced quimical applications to reduce damage.

Next speaker : Romania



Romania



Romania

ROMANIAN SUGAR BEET GROWERS FEDERATION



2024 Campaign run from September to December-January

100 % of the beet is grown by independent growers

566 independent beet growers

2 factories

On average, a farmer grows 40.44 ha of beet



	2023/2024	2024/2025	2025/2026
Acreage dedicated to beet <i>(ha)</i>	15,650ha	22,800ha	18,000ha?
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	45,29t/ha	29t/ha	36.6 <i>(5-year average)</i>
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	7,33	5.7	7 <i>(5-year average)</i>
Total sugar production of the country <i>(metric ton)</i>	92,600t	120,000t	95,000-120,000t
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	-

Romania

ROMANIAN SUGAR BEET GROWERS FEDERATION



- *Macrophomina phaseolina* becomes a problematic disease during heatwaves in the summer; 2000-3000ha might be left in the field.
- The campaign days changed due to *macrophomina*, starting early September and might be up to 15th January,
- We see all over the Romanian market that the Ukrainian imported sugar is still impacting the factories price offer in 2025, thus farmers might reduce naturally the hectares with low price.



Next speaker : South-Africa



South Africa



South Africa

South African Canegrowers Association





Campaign run from April to November/December

95% of the cane is grown by independent growers

25353 independent cane growers

12 factories

On average, a LSG grows 250 ha of cane

On average, a SSG grows 2 ha of cane

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane <i>(ha)</i>	343,638	339,394	No data
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	52.22	53.68	51,48 <i>(5-year average)</i>
Sugar yield in field <i>(metric ton of eq. total sugar/ha)</i>	5.84	5.75	5,63 <i>(5-year average)</i>
Total sugar production of the country <i>(metric ton)</i>	2 005 208	1 950 269	1 955 631 <i>(5-year average)</i>
Total ethanol production of the country, from beet/cane <i>(m³)</i>	Nil	Nil	Nil

South Africa

South African Canegrowers Association

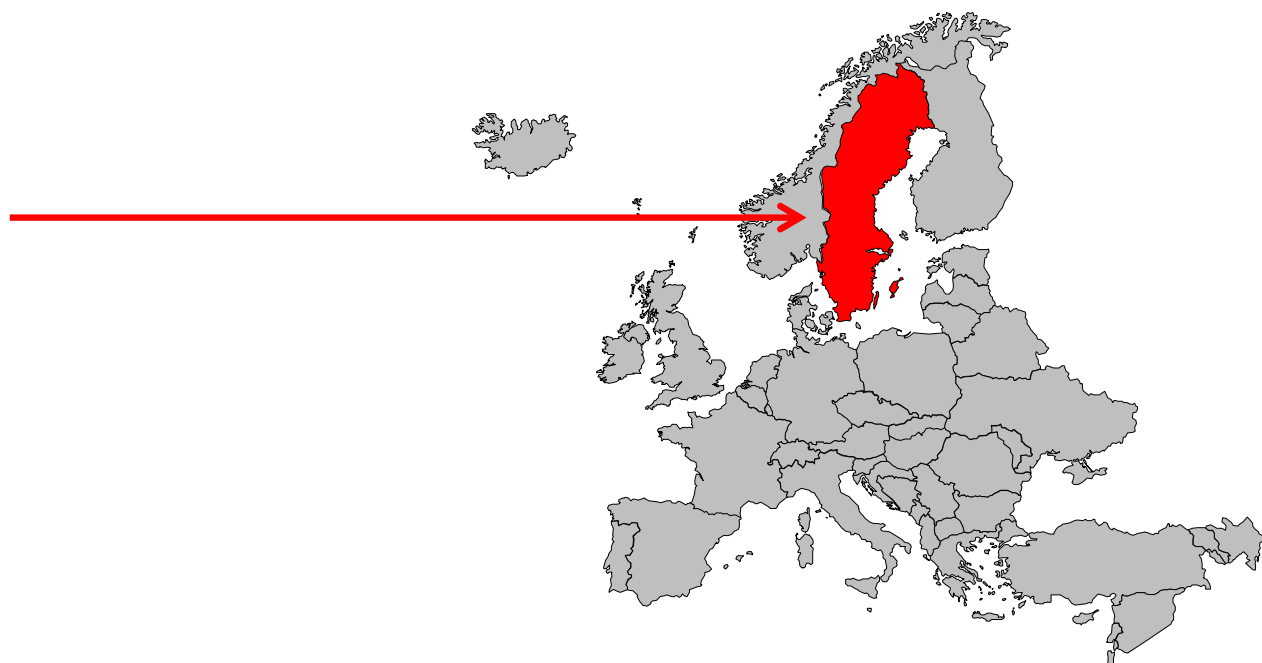


- 2024/25 Season late drop in cane production due to dry, warm winter, leading to early closure of mills
- Business Rescue processes ongoing for two milling companies
- Threat of increase in sugar tax on sugar-sweetened beverages

Next speaker : Sweden



Sweden



Sweden

Betodlarna, Swedish beet growers association





Campaign run from **SEPTEMBER** to **JANUARY**
930 independent beet growers
1 factories
On average, a farmer grows 30 ha of beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	28455	27 700	Est. 24 150
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	60,4	Est. 71	
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	9,84	Est. 12	
Total sugar production of the country <i>(metric ton)</i>	Est. 280 000	Est. 300 000	
Total ethanol production of the country, from beet/cane <i>(m³)</i>	---	---	---

Sweden

Betodlarna, Swedish beet growers association



- Campaign 2024/25
 - Average yields despite late sowing and early start of the campaign
- The new tare house
 - Modern and « standard » equipped tare house
 - Setup of new routines for the industry and for the growers association
- Beet contracts 2025
 - Decreased sugar production and at the same time a big interest from growers to contract beets to 2025

Next speaker : Türkiye

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Around the World



Türkiye



TÜRKİYE

Ministry of Agriculture and Forestry



Campaign run from September to January
All sugar beets are grown by factories under contract with farmers.
93.283 (under contract) beet growers
33 factories
On average, a farmer grows 3,53 ha of beet

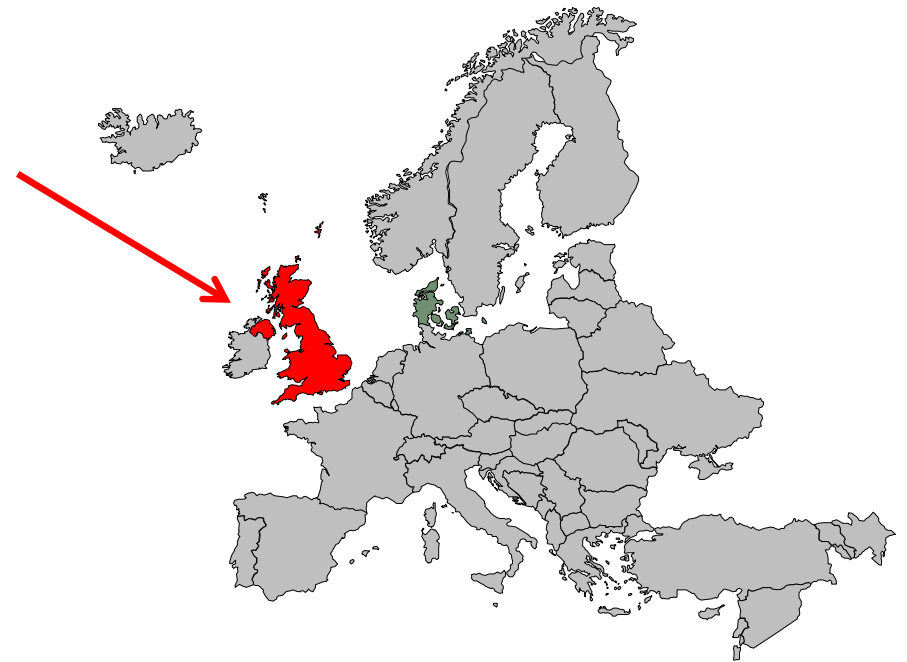
	2023/2024	2024/2025 (Estimated)	2025/2026 (Estimated)
Acreage dedicated to beet (ha)	364.070	329.729	300.000
Plant yield in field (metric ton of beet/ha)	69,0	69,8	70
Sugar yield in field (metric ton of eq. white sugar/ha)	10,86	11,78	12
Total sugar production of the country (metric ton)	3.335.539	3.000.00	3.000.00
Total ethanol production of the country, from beet (m³)	15.414.386	20.000.000	20.000.000



- In Türkiye, there are 33 sugar factories that produce sugar from sugar beet in different areas of the country. In some areas, esp. in Middle Anatolian Region, drought and water shortages have reached levels that may cause problems in the coming years. In this regard, the policies have been developed to overcome this problem.
- As a result of the studies that have been carried out, the first seeds of Turkish origin that are resistant to diseases and pests have been produced in 2024.
- A satellite-based beet tracking system has been set up in 2024, which allows for the inspection of the planting areas and the monitoring the growth of the beet.



United-Kingdom



United Kingdom

National Farmers Union (NFU Sugar)





Campaign run from **SEPTEMBER** to **MARCH**
98% of the beet is grown by independent growers
2323 independent beet growers
4 factories
On average, a farmer grows 44 ha of beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	87,500	91,500	? Lower than 2024
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	90	88 est	-
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	12.2	12 est	-
Total sugar production of the country <i>(metric ton)</i>	1.07Mt	1.1Mt est	-
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	-

United Kingdom

National Farmers Union (NFU Sugar)

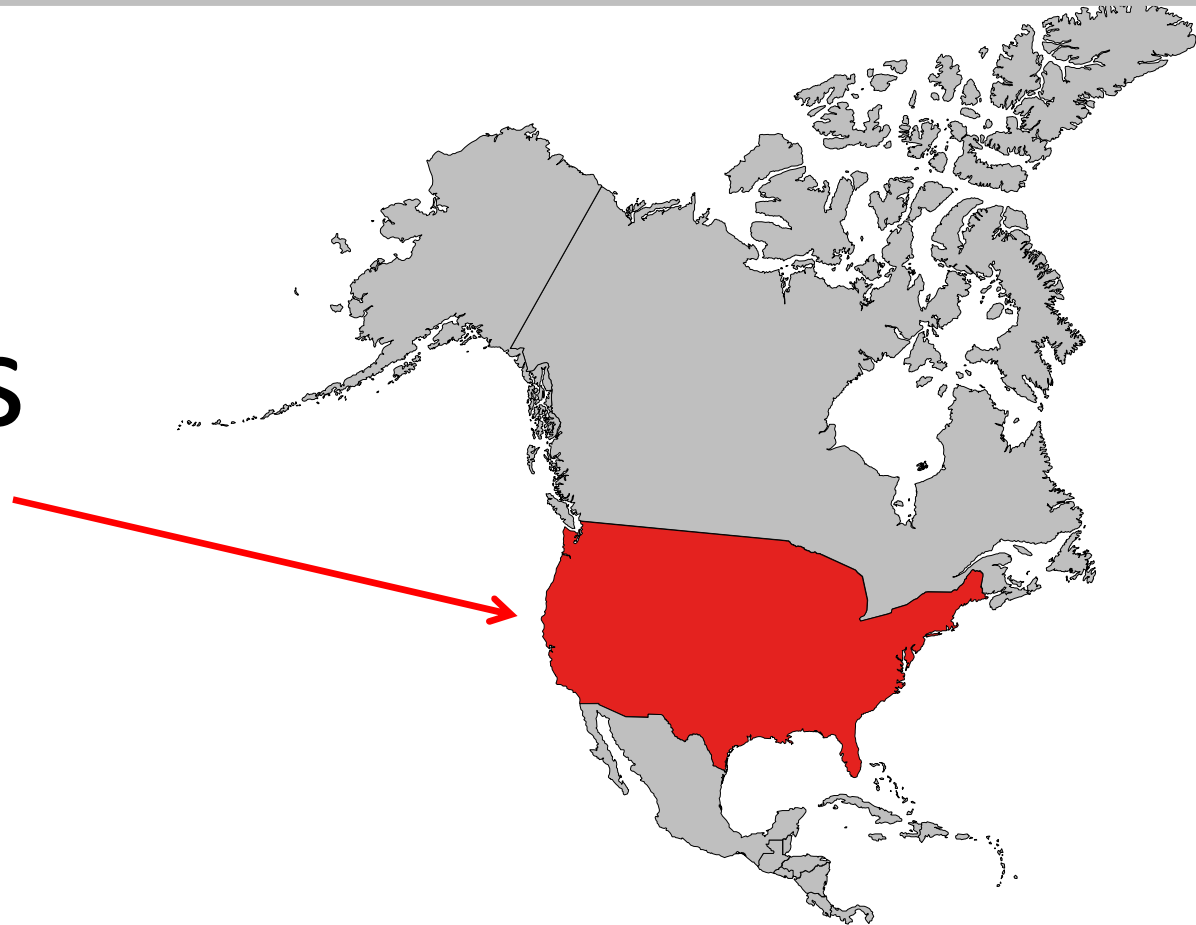


- Beet area expected to drop in 2025 with lower prices agreed.
- NFU has facilitated pilot project to secure incentive payments from Nestlé for growers to reduce the carbon footprint of beet by placing nitrogen at drilling.
- New Government has announced major tax changes that could lead to the break up of family farms.

Next speaker : USA



United States
of America



USA

Red River Valley Sugarbeet Growers Association



 Campaign run from April to October
2,800 independent beet growers
5 factories
On average, a farmer grows 64 ha of beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	Planted : 175 119 Harvested : 161 110	167 468	167 950 Est
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	69.8	72.3	69.0 Est
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	13.0	13.4	13.0 Est
Total sugar production of the country <i>(metric ton)</i>			
Total ethanol production of the country, from beet/cane <i>(m³)</i>			

USA

Red River Valley Sugarbeet Growers Association



- Farm Bill / New Congress
- EPA / Regulations
- Nutrition

Next speaker : Australia



Australia



Australia

Australian Cane Growers Council



Campaign run from June to May
3663 independent cane growers
22 factories
On average, a farmer grows 94 ha of cane



	2022/2023	2023/2024	2024/2025
Acreage dedicated to cane <i>(ha)</i>	328,111	341,084	345,000
Plant yield in field <i>(metric ton cane/ha)</i>	99.33	88.00	87.00
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	13.1	12.12	12.15
Total sugar production of the country <i>(metric ton)</i>	4,297,609	4,128,392	4,191,750
Total ethanol production of the country, from cane <i>(m³)</i>	+/- 60 million	+/- 60 million	+/- 60 million

Australia

Australian Cane Growers Council



- Cane quality is average to above average, with CCS ranging from 11.7 to 14.7. Growers are achieving prices of between AU\$43/t - AU\$69/t of cane and locking in sugar prices of between AU\$500 and AU\$800/t.
- Industrial action and poor mill performance, and the associated increasing season lengths, continues to be of real concern for the industry.
- Challenges persist around workforce availability and risk on the harvesting and logistics sector
- Work continues to progress the traceable sustainable sugar supply chain work
- The industry continues to do a lot of work around the future prospects for an emerging bioenergy and sustainable aviation fuel industry in Australia
- CANEGROWERS is establishing a joint project with the milling sector to investigate ways of improving the overall viability of the industry

Next speaker : Austria



Austria



Austria

Association of Austrian Beet Growers





Campaign run from September to February
100 % of the beet is grown by independent growers
5000 independent cane/beet growers
2 factories
On average, a farmer grows 8.5 ha of beet

	2023/2024	2024/2025*	2025/2026*
Acreage dedicated to beet <i>(ha)</i>	36,150	43,000	35,000
Plant yield in field <i>(metric ton of beet/ha)</i>	74.00	78.00	78.00
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	11.30	10.50	11.30
Total sugar production of the country <i>(metric ton)</i>	407,730	451,500	395,000
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	-

* estimate

Austria

Association of Austrian Beet Growers



- 2024 significant increase of beet area
 - ✓ *good price of beets, bad price of other crops*
- small losses by the weevil
 - ✓ *just 750 hectares*
- 50 % Conviso
- Perfect conditions after sowing and enough rainfalls until June
- Hot an dry summer
 - ✓ *beets were suffering*
- September rainfall with up to 450 mm within 3 days
 - ✓ *some flooded areas around one sugar factory (Tulln)*



Austria

Association of Austrian Beet Growers



Austria

Association of Austrian Beet Growers



- start of campaign one week later (last week of September)
- 500 hectares damaged totally due to the flood
- 75 tonnes per hectare, 15 % sugar content
- beet price maybe the half of 2023
- reduction of beet area for 2025

Next speaker : Belgium



Belgium



Belgium

CBB - Confédération des Betteraviers Belges



 Campaign run from Oct to Sep
100 % of the beet/cane is grown by independent growers
+- 6000 independent cane/beet growers
3 factories – 2 sugar groups
On average, a farmer grows 7/8 ha of cane/beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	55 037 ha	55 500 ha	48 000
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	89 T / ha (16°)	-	-
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	11,89 T / ha	-	-
Total sugar production of the country <i>(metric ton)</i>	654.117 T	-	-
Total ethanol production of the country, from beet/cane <i>(m³)</i>	-	-	-

Belgium

CBB - Confédération des Betteraviers Belges



- 2023: very wet, low sugar content (15.5) – 2,000 ha not harvested
*Année 2023 très humide beaucoup d'eau, richesse très basse 15,5
2000 hectares non récoltés*
- 2024 : still very wet, with late sowing until early July and lot of pests :
Cercosporia, despite 3-4 treatments. Low sugar content and yield below average
*Toujours très humide, semis tardif jusqu'à début juillet, beaucoup de maladie : cercosporiose malgré 3-4
traitements, basse richesse et rendement en dessous de la moyenne*
- 2025: bad year, with lower acreage and unattractive prices. Resistant weeds
linked to fewer available herbicides. Cercosporia is a challenge.
*2025 sont mauvaises, réduction de surface et prix très bas, résistance des mauvaises herbes plus
importantes à cause de la réduction de plusieurs matières actives, challenge : cercosporiose*





Brazil



Brazil

ORPLANA - ORGANIZATION OF CANE GROWERS ASSOCIATIONS IN BRAZIL

 Campaign run from april to March
41% of sugarcane comes from independent cane growers and 59% factories
On average, a farmer grows 71,1 ha of cane



	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	8,333,929	8,627,922	8,561,685
<i>Crushed sugarcane (Brazil), Mt</i>	712.9	652.9	644.0
<i>Crushed sugarcane (Center-South), Mt</i>	654.4	590.0	582.0
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	85.5	75.6	75.2 <i>(5-year average-75,976)</i>
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	11.9	10.6	10.5 <i>(5-year average-10.8)</i>
Total sugar production of the country <i>(metric ton)</i>	45,918,957	42,840,000	42,668,640
Total ethanol production of the country, from beet/cane <i>(m³)</i>	35,976,743	33,586,667	33,452,320

Brazil



ORPLANA - ORGANIZATION OF CANE GROWERS ASSOCIATIONS IN BRAZIL

- Low rainfall and high temperatures, combined with fires that also burned areas of regrowth, generating losses for the next seasons.
- Failure to sprout and delayed germination can also favor a greater infestation of weeds, further damaging the yield of sugarcane fields.
- The urgent need for more seedlings requires the expansion of production areas.
- Updating the sugarcane pricing model, implementing a good practices seal for growers and integrating it into the RenovaBio program to increase its value.
- Recognition and inclusion of sugarcane growers in the face of the narratives imposed on the sector.

Next speaker : Côte d'Ivoire



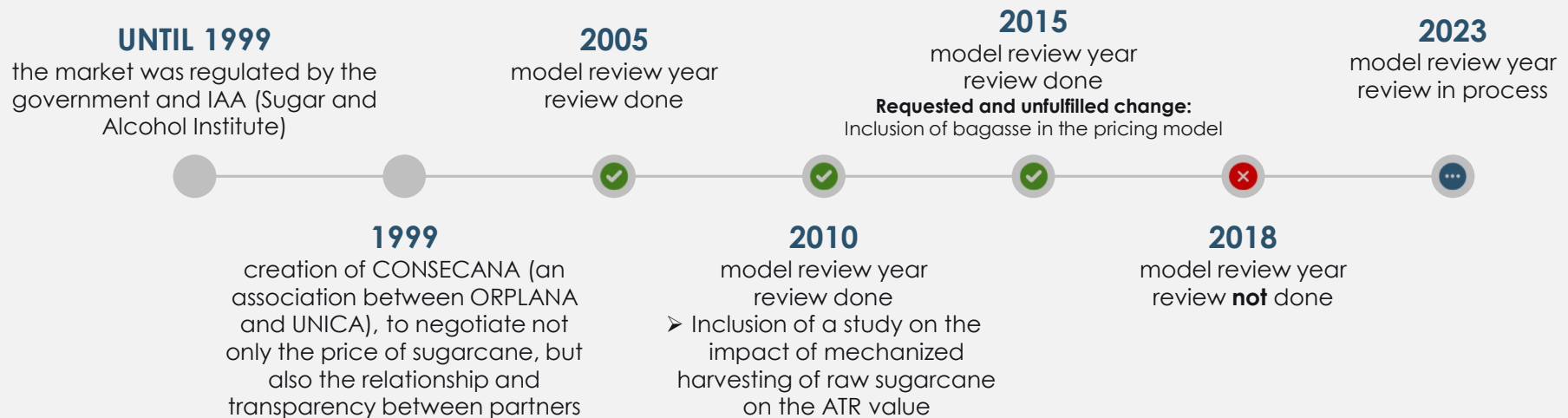
Sugarcane, Sugar and
Ethanol Producers Council
of São Paulo State

ABOUT CONSECANA

the model is based on a cost-to-cost ratio, where 03 types of sugar and 06 types of ethanol are considered

the defined participation is 62.1% of ethanol and 59.5% of sugar

Article 27 – every 5 (five) years, the Board of Directors must review the technical and economic aspects, as well as the recommendations for contracting sugarcane purchase and sale transactions, as defined in the Regulation and its Annexes.



THE PRESSURE FROM SUGARCANE GROWERS TO REVIEW CONSECANA MODEL

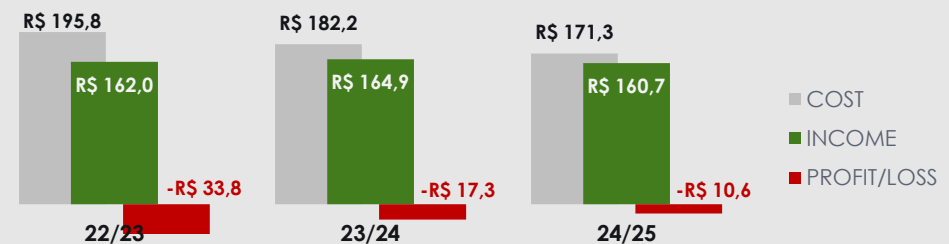
Review not carried out in the last scheduled year (2018)



Dissatisfied sugarcane growers



High sugarcane growing costs and drop in profitability in recent harvests (R\$/ton)



Non-signature of the price document by ORPLANA



Carrying out studies on the balance sheets of plants



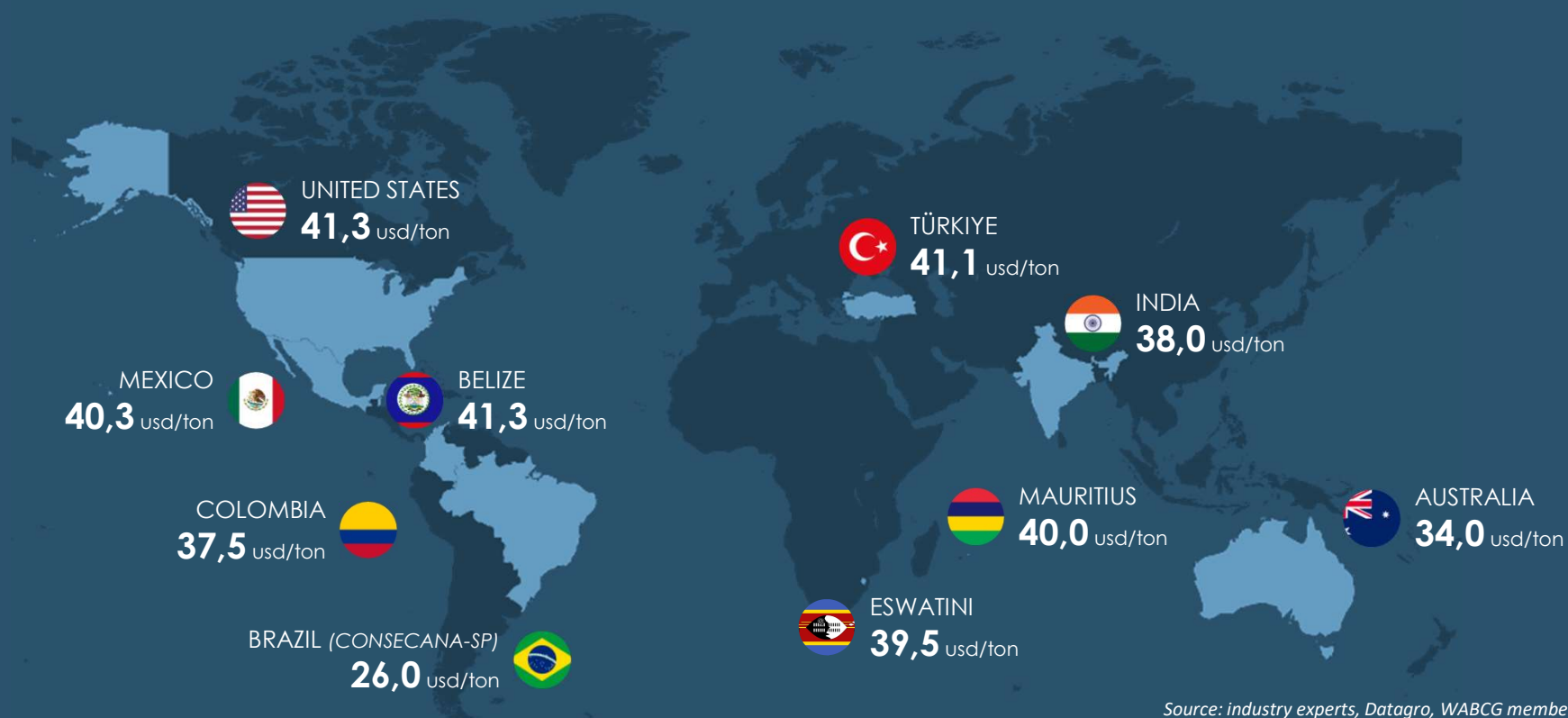
Signing of the agreement for review of the CONSECANA model



Hiring a specialized company to carry out the review:

1. Review of technical and economic parameters (participation and inclusion of bagasse as a product);
2. Improvements and effectiveness in capturing prices;
3. Governance.

AVERAGE SUGARCANE PRICES AROUND THE WORLD



ANALYSIS OF INDUSTRIAL PLANT BALANCE SHEETS

INDICADORES POR TONELADA

INDICADORES POR TONELADA														
INDICADORES	Conceição	Alcobaça	Colombo	Dama	Isoroba	Kalen	Santa I. S. Manoel	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho
Produção/Moagem Flocos	275,48	281,60	301,71	210,00	491,38	961,81	283,25	312,43	306,81	313,68	257,57	310,28	373,31	287,45
Custo Caixa/Moagem Flocos	184,68	183,57	255,28	153,17	345,28	602,38	218,14	208,41	255,43	184,87	153,15	201,61	324,32	185,32
LULI/Moagem Flocos	134,34	132,27	180,44	95,48	245,32	360,55	107,30	209,61	106,25	128,17	144,66	189,30	192,23	270,92
PRIMA Ajustada por CAF/Moagem Flocos	54,42	55,90	75,38	25,45	-12,62	38,47	37,33	97,62	98,10	14,75	31,62	92,94	85,55	-80,01
CMda Orosia Buta/Moagem Flocos	346,82	287,54	444,41	271,88	642,46	361,64	288,52	354,64	515,04	384,88	254,17	421,68	120,21	354,05
ICLL/Moagem Flocos	21,81	79,10	-21,10	-51,94	-19,64	-23,21	2,29	12,80	66,10	-70,32	84,62	48,80	31,20	-17,33
CAF/Moagem Flocos	80,13	79,28	105,08	89,15	268,11	51,48	73,81	112,30	68,13	139,42	-79,94	98,96	78,85	213,77
ICPV/CAPEX/Moagem Flocos	265,11	253,15	560,34	220,52	610,44	655,86	288,70	320,70	527,58	203,20	213,06	207,87	403,17	375,50
LULI/Moagem Flocos	103,10	95,90	116,45	114,73	193,24	41,18	27,57	148,70	124,62	122,20	95,57	134,42	131,16	131,72
FOOF/Moagem Flocos	150,18	113,46	152,82	91,00	253,23	67,64	87,38	178,88	168,27	45,71	122,81	174,57	115,52	113,05
FCLM/Moagem Flocos	57,28	38,02	105,82	-85,35	115,08	70,72	-6,74	22,58	174,48	-1,75	180,57	75,55	55,65	-16,71
Resultado Financeiro/Moagem Flocos	-19,64	-20,51	-27,90	-18,92	-49,11	-13,61	24,03	-22,91	-9,66	-29,84	-12,43	-19,68	-1,47	-22,79
Despesa Financeira/Moagem Flocos	33,68	33,67	58,88	53,71	86,18	21,04	28,75	44,46	34,80	35,61	17,41	36,27	19,55	37,27

INDICADORES POR TONELADA														
INDICADORES	Alcobaça	Colombo	Dama	Isoroba	Kalen	Santa I. S. Manoel	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho	S. Martinho
Produção/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Custo Caixa/Moagem Flocos	2	2	2	2	2	2	2	2	2	2	2	2	2	2
LULI/Moagem Flocos	2	2	2	2	2	2	2	2	2	2	2	2	2	2
PRIMA Ajustada por CAF/Moagem Flocos	2	2	2	2	2	2	2	2	2	2	2	2	2	2
CMda Orosia Buta/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
ICLL/Moagem Flocos	1	1	1	1	1	1	1	1	1	1	1	1	1	1
CAF/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
ICPV/CAPEX/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
LULI/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
FOOF/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
FCLM/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Resultado Financeiro/Moagem Flocos	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Despesa Financeira/Moagem Flocos	5	5	5	5	5	5	5	5	5	5	5	5	5	5

There are many resources available with industrial plants that are not being made available to growers.

EXPECTATIONS OF ORPLANA AND GROWERS



Studies being carried
out by FGV
(Getulio Vargas Foundation)



End of studies in
December 2024



Application still in this
harvest
(until 03/31/2025)



SAVE THE DATES!

APRIL 2nd and 3rd 2025

 BRASILIA - BRAZIL

CANA 
SUMMIT



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Côte d'Ivoire

Ivory Coast



CÔTE D'IVOIRE

Fédération des Producteurs de Cannes Villageoise de Côte d'Ivoire (FEPCANVICI)



Campaign run from **November** to **May**
3,000 independent cane/beet growers
4 factories
On average, a farmer grows 1 to 3 ha of cane/beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	28 175		
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	74 t/ha		
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	7,0 t/ha		
Total sugar production of the country <i>(metric ton)</i>	202 323		
Total ethanol production of the country, from beet/cane <i>(m³)</i>			

CÔTE D'IVOIRE



Fédération des Producteurs de Cannes Villageoise de Côte d'Ivoire (FEPCANVICI)

- **Sugar price rose by 30 % in Ivory Coast**

Augmentation de 30% du prix du sucre au niveau national

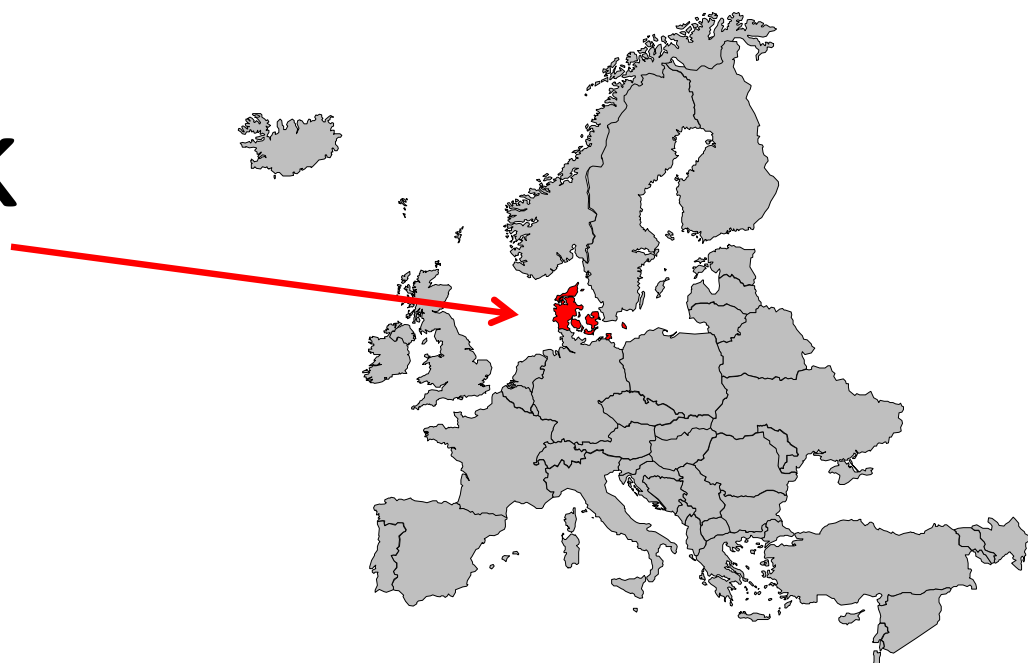
- **A meeting took place between growers and Agriculture ministry in order to review price of sugarcane (unchanged for 10 years, and only based on tonage, independantly of its sugar content), and to implement a dialogue within the industry**

Une rencontre d'échanges et d'informations a eu lieu entre les producteurs et le ministre de l'agriculture en vue de l'actualisation du prix de la tonne canne et mise en place d'un cadre concertation.

Next speaker : Denmark



Denmark



Denmark

Danske Sukkerroedyrkere (Danish Beet Growers)



 Campaign run from September to January
100 % of the beet/cane is grown by independent growers
650 independent cane/beet growers
2 factories
On average, a farmer grows 47 ha of cane/beet

	2023/2024	2024/2025	2025/2026
Acreage dedicated to cane or beet <i>(ha)</i>	31 006	App. 34 500 ha	App. 30 000 ha
Plant yield in field <i>(metric ton of beet or cane/ha)</i>	74.8	Exp. 71.0	Exp. 75.0
Sugar yield in field <i>(metric ton of eq. white sugar/ha)</i>	11.6	Exp. 11.6	Exp. 12.5
Total sugar production of the country <i>(metric ton)</i>	360 000	Exp. 400 000	Exp. 375 000
Total ethanol production of the country, from beet/cane <i>(m³)</i>	0	0	0

Denmark



Danske Sukkerroedrykere (Danish Beet Growers)

- Our campaign started in the second half of September.
Rainfall has been moderate and the conditions in the field for lifting beet have been very good until now.
Yield is little below average because of a very late sowing – 1 month later than normal because of a wet April.
The sugar factories are basical running well.
- But – and there is unfortunately a huge ”But”.
Our sugar processor has before the start of the campaign changed to a new sampling system, where they have gone from a Cocksedge system to a Rupro system.
And it is not working well
 - The software system has not worked properly, so the growers are missing a lot of samples from their loads
 - Even though the conditions for lifting beet have been very good, the measured percentage of dirt in the loads are much higher than expected

* We are in process to find a solution together with our sugar processor but is not an easy task for us to come to an agreement!



WABCG/ISO Consultation