World Association of Beet and Cane Growers

NEWS FROM WABCG

NOVEMBER 2025

EDITO

In a few days, we will all meet again in London for our annual ISO/WABCG consultation. This is an important moment for our profession, for our organizations. It is even part of our rituals — those moments that repeat themselves, bringing comfort and reassurance.

We need that, and we need it even more that the state of the sugar market is on everyone's mind. For if there is one other constant, it is the cyclical volatility of our markets!

Two years ago, around this time, raw sugar was trading at 27 cts/lb… How distant that now seems, with prices having fallen below 15 cts/lb!

I don't think I'm wrong in saying that at today's price levels, no one emerges a winner. We are entering a destructive cycle, one that repeats itself with the market's every breath, magnified by speculation that is almost impossible to quantify!

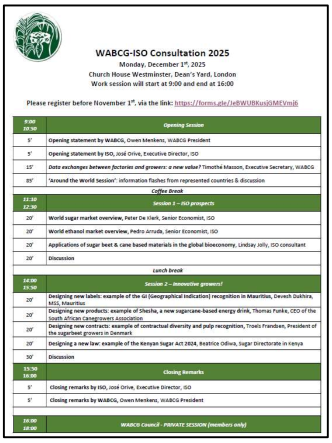
And in such times of concern, if there is one thing to do, it is to come together, to reconnect. In short, to bring together our great family — the WABCG — which I am proud to lead!

See you soon, dear colleagues!

Owen Menkens, President
WABCG

WABCG/ISO Consultation
1st December 2025
London, United-Kingdom

Around the World Session
Session 1: ISO Prospect
Session 2 : Innovative growers!



WABCG-ISO Consultation 2025
Monday, December 1st, 2025
Church House Westminster, Dean's Yard, London
Work session will start at 9:00 and end at 16:00

Please register before November 1st, via the link: https://forms.gle/JeBWUBKusjGMEVmj6

9:00 10:50	*Opening Session*
5'	**Opening statement by WABCG**, Owen Menkens, WABCG President
5'	**Opening statement by ISO**, José Orive, Executive Director, ISO
15'	***Data exchanges between factories and growers: a new value?*** Timothé Masson, Executive Secretary, WABCG
85'	**'Around the World Session'**: information flashes from represented countries & discussion
	Coffee Break
11:10 12:30	*Session 1 – ISO prospects*
20'	**World sugar market overview**, Peter De Klerk, Senior Economist, ISO
20'	**World ethanol market overview**, Pedro Arruda, Senior Economist, ISO
20'	**Applications of sugar beet & cane based materials in the global bioeconomy**, Lindsay Jolly, ISO consultant
20'	**Discussion**
	Lunch break
14:00 15:50	*Session 2 – Innovative growers!*
20'	**Designing new labels: example of the GI (Geographical Indication) recognition in Mauritius**, Devesh Dukhira, MSS, Mauritius
20'	**Designing new products: example of Shesha, a new sugarcane-based energy drink**, Thomas Funke, CEO of the South African Canegrowers Association
20'	**Designing new contracts: example of contractual diversity and pulp recognition**, Troels Frandsen, President of the sugarbeet growers in Denmark
20'	**Designing a new law: example of the Kenyan Sugar Act 2024**, Beatrice Odiwa, Sugar Directorate in Kenya
30'	**Discussion**
15:50 16:00	Closing Remarks
5'	**Closing remarks by ISO**, José Orive, Executive Director, ISO
5'	**Closing remarks by WABCG**, Owen Menkens, WABCG President
16:00 18:00	*WABCG Council - PRIVATE SESSION (members only)*

Last call before boarding:
Contact WABCG of you want to join!

The World Association of Beet and Cane Growers (WABCG) is the international organisation which groups together the national and regional associations of sugar beet and sugar cane growers at international level. WABCG has 37 member associations and unites over 5 million sugar beet and sugar cane growers from the five continents. WABCG is present in over 30 countries, producing 60% of world sugar production.

NEWS FROM THE PHILIPPINES

The 2025-2026 sugarcane campaign marks the transition of the country's milling months from the traditional period of September 1st to August 31st into October 1st of the current year to September 30th of the following year.

Looking back, 2.085 Mt of raw sugar was produced despite the drought in the 2024-25 campaign.

The current period is more challenging due to crop infestation of red striped soft-scale insects (RSSI) which the Sugar Regulatory Administration (SRA) reported in September 2025 to have affected around 6,334 hectares of plantations across sugarcane plantations of the Visayas where Negros island is located.

Negros island is popularly known as the "Sugar Bowl in the Philippines" where it shared no less than 60% of the total sugar production in the country. RSSI infestation has prompted SRA to a forecasted raw sugar production of 1.92 Mt for 2025-2026 campaign.

Besides RSSI infestation, millsite prices of raw sugar on the first milling week of 2025-2026 campaign dipped to a low of 2,262 Philippine peso (≌US$38.34) per 50-kilo bag compared to 2,792 Philippine peso (≌US$49.80) per 50-kilo bag on the first milling week of 2024-2025 that threatens the income of sugar producers, particularly small farmers, as well as the sustainability of the sugarcane industry in the Philippines.

The Philippines produced enough raw sugar for its domestic market and a modest excess production to cater with its sugar US Tariff Rate Quota (TRQ) but a net importer of refined sugar. On the point of view of sugar producers like the Confederation of Sugar Producers Association (CONFED), the government importation policy of refined sugar should be well calibrated so as not to flood the domestic market with imported sugar which displaced the demand of raw sugar for the domestic sugar refining factories.

CONFED is currently studying the effect to cane sugar demand the use of alternative sweeteners by sugar-based domestic products which include HFCS, aspartame, saccharin, sucralose, acesulfame and others. In 2018, pursuant to the Tax Reform for Acceleration and Inclusion Law (TRAIN), HFCS-sweetened beverages are taxed with 12 pesos (≌20 US Cents) per liter while cane sugar-sweetened beverages are taxed with 6 pesos (10 US Cents) per liter.

Aurelio Gerardo J. Valderrama, Jr, President,
Confederation of Sugar Producers Association (CONFED),
The Philippines

News from India

The Indian sugar industry is having opening stock of 13.32 million tonnes of sugar for the season 2024-25. The sugar production (white value) was 26.10 million tonnes in the season 2024-25 which was 18.77% less than the past season (32.13 million tonnes). This drop in production can be attributed to the decrease in sugar production of major states viz. Maharashtra (26.67%), Karnataka (21.66%) and Uttar Pradesh (10.94%). The country's sugar production is likely to 27.90 million tonnes (white value) in forthcoming season 2025-26.

The sugarcane production is expected to be 450.16 million tonnes during season 2024-25 as compared to previous season's production of 423.50 million tonnes.

Under the Ethanol Blending Program (EBP) of India, total 9 048.00 million liters of ethanol were supplied to OMC for 2024-25 (Nov.-Oct.) out of that contribution from sugar mills was 3 067.00 million liters with 19.00% achieved blending percentage. Around 1 620.00 million liters has been produced from sugarcane syrup, 1 298.00 million liters from B heavy molasses, 149.00 million liters from C molasses, 687.00 million liters from damaged food grains, 4 199.00 million liters from maize and 1 095.00 million liters from subsidized rice. During season 2024-25, around 3.4 million tonnes of equivalent sugar is likely to be diverted for production of ethanol.

Sambhaji Kadupatil, Director General,
Vasantdada Sugar Institute, Pune, India

Indian Sugar Balance

(In Million tons)

Sugar	2024-25	2023-24	2022-23	2021-22	2020-21
Number of mills in operation	534	535	534	524	506
Opening stocks	13.32	10.02	11.81	14.60	15.11
Production	26.10	32.20	32.79	35.53	31.23
Imports	2.30	3.32	1.37	0.34	1.26
Consumption	28.70	28.50	27.85	27.22	25.90
Exports	3.00	3.72	8.10	11.43	7.09
Closing stocks	10.02	13.32	10.02	11.81	14.60
Stock % Consumption	34.91	46.74	35.98	43.39	56.37

Source: ISO Quarterly Market Outlook

News from United Kingdom

The first eight months of 2025 were characterised by a lack of rainfall in the UK. The spring was one of the driest on record and the summer was not much better, with the East of England, where the UK's sugar beet is grown, receiving only 50-60% of its average summer precipitation. While rain did arrive at timely

moments after hot spells of weather, it was often poorly distributed, meaning that while some areas got some relief from the dryness, others did not.

The dry conditions have resulted in mixed fortunes for this year's beet crop. On the positive side, the dry weather in March allowed farmers to plant earlier than normal. At the same time, a cool winter has meant that aphid pressure has been relatively low; beet has been grown without neonicotinoid seed coating this year, but virus yellows have not been a significant problem. In areas where rain was received at the right time and soils were sufficiently heavy to retain water, the sunny conditions were very supportive for the crop; above-average yields are expected in these areas. However, in many cases, beet in lighter soils have suffered badly from the dryness. The stark differences make estimating this year's crop particularly difficult.

Looking ahead to next year, the beet price for 2026/27 was announced in mid-August. With sugar prices in the EU and UK remaining depressed, the beet price offered for 2026/27 is lower than for the current crop year. As part of the deal, growers have been given the opportunity to take a contract '*holiday*'. This allows them to reduce their beet area in 2026/27 without losing their right to grow in subsequent years. At the time of writing, contracting is not yet complete, but it is clear that beet area will be lower than in 2025/26.

The lower beet price is not the only reason why area is expected to be lower next year. A much kinder autumn has created unexpected opportunities for farmers. An early wheat harvest allowed rapeseed to be drilled early and to become established before it could be damaged by flea beetle. Similarly, good planting conditions have encouraged others to plant a bit more winter wheat. Along with the lower price, both these factors are counting against beet area in 2026/27.

The broader farming situation in the UK remains extremely difficult. Direct support to farmers is in the process of being phased out with payments ending in 2027, and taxation on farming is set to increase. A poor wheat harvest, coupled with low wheat prices, has added to the challenges facing arable farmers this year. In this context, financial pressures continue to build, with some choosing to exit the sector altogether. The trend towards consolidation looks set to continue in the next few years.

Gareth Forber, Commercial, Market Insight Manager
NFU Sugar, United Kingdom

The good and the bad: dry conditions have resulted in a wide range of results this year