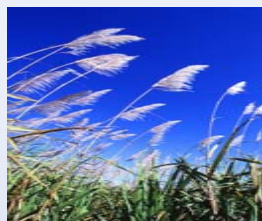


# FAPRI 2006

## Preliminary Baseline

December 15-16, 2005

### INTERNATIONAL SUGAR



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(515)-294-6175

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# FAPRI

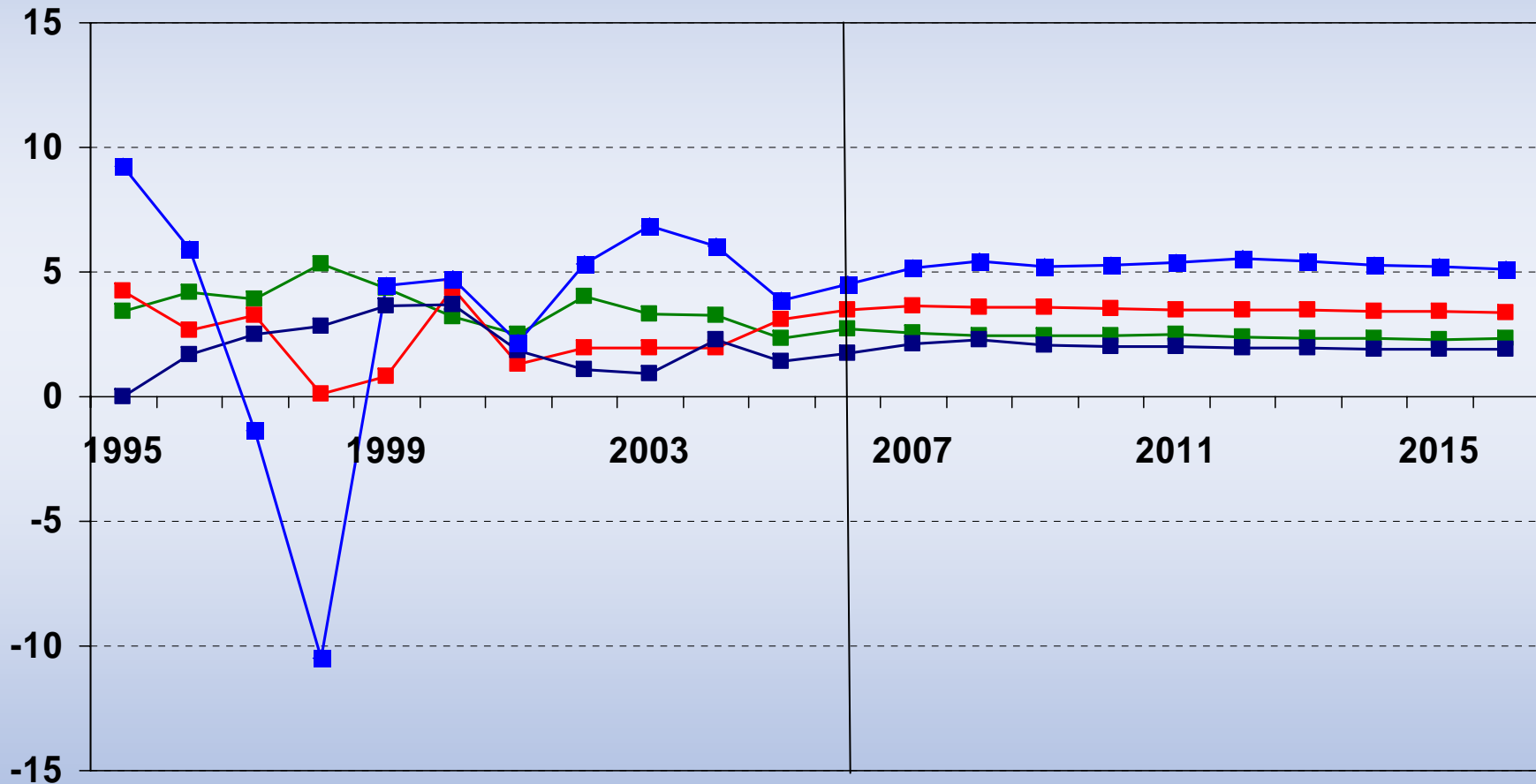
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**Food and Agricultural  
Policy Research Institute**

Center for Agricultural and Rural Development  
Iowa State University, Ames, Iowa 50011-1070  
(515)-294-1183 <http://www.fapri.iastate.edu>

# Real GDP Growth Rate of Major Exporters

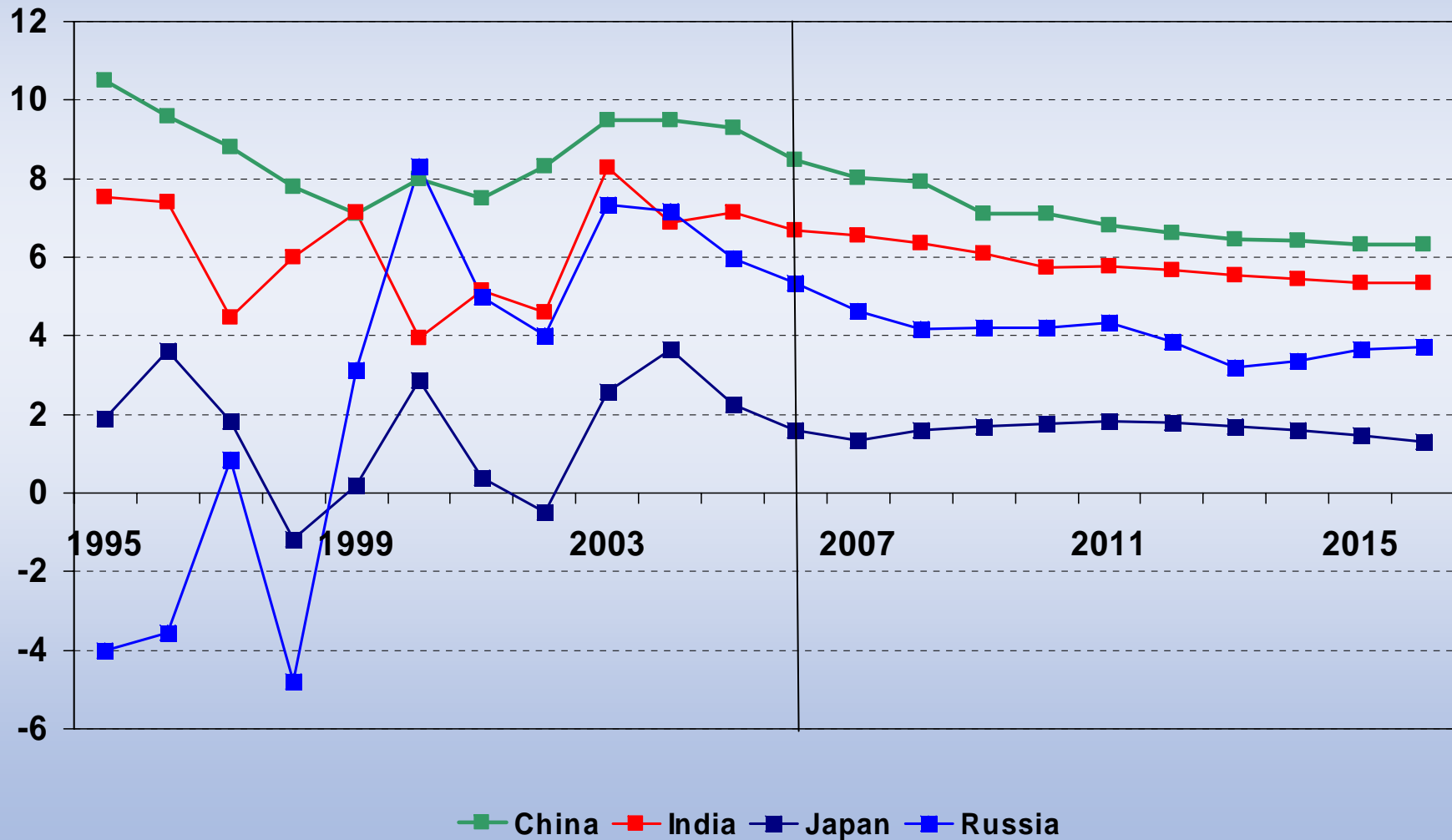
Percent



—■ Australia —■ Brazil —■ EU-15 —■ Thailand

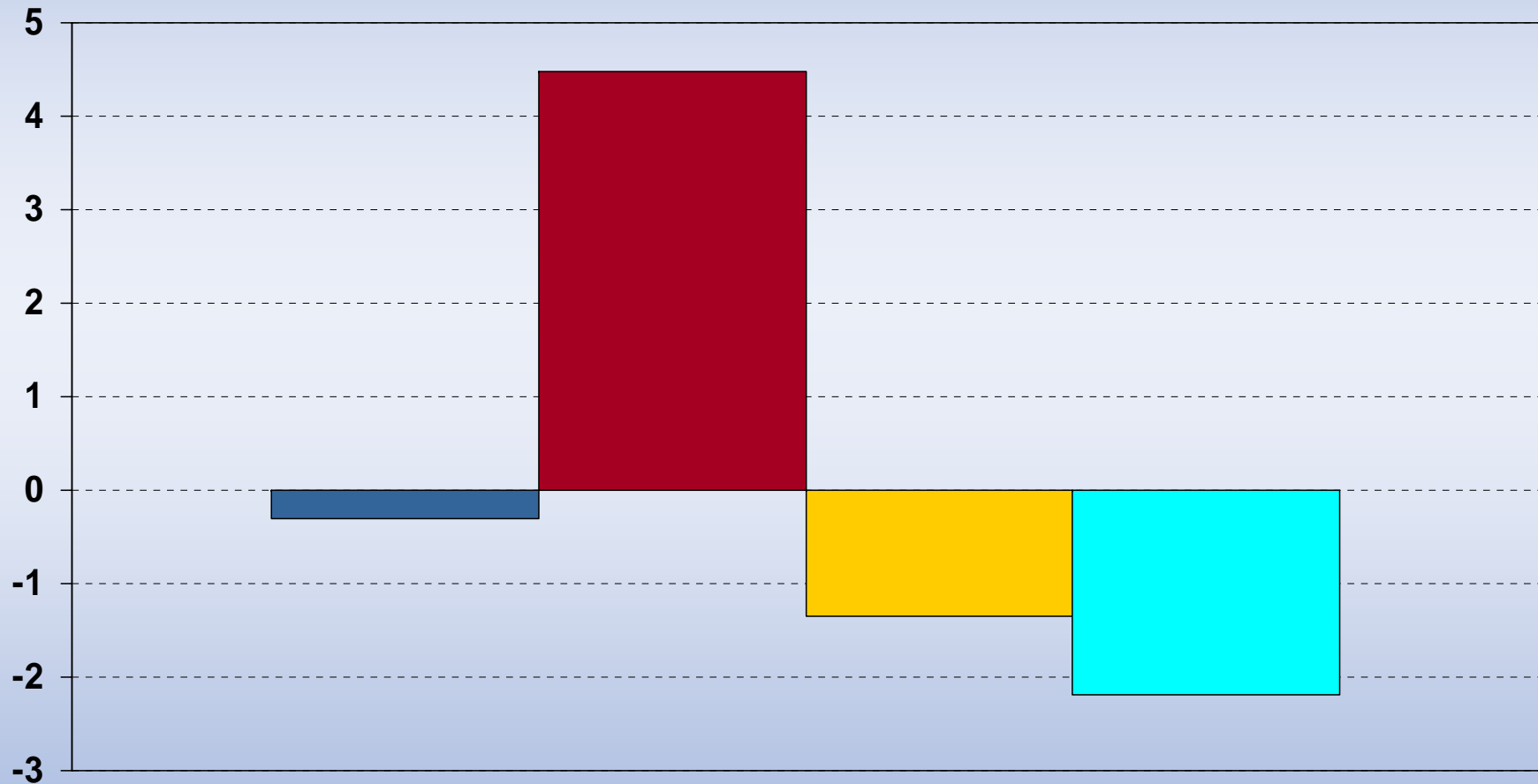
# Real GDP Growth Rate of Major Importers

Percent



# Average Exchange Rate Growth for Major Exporters

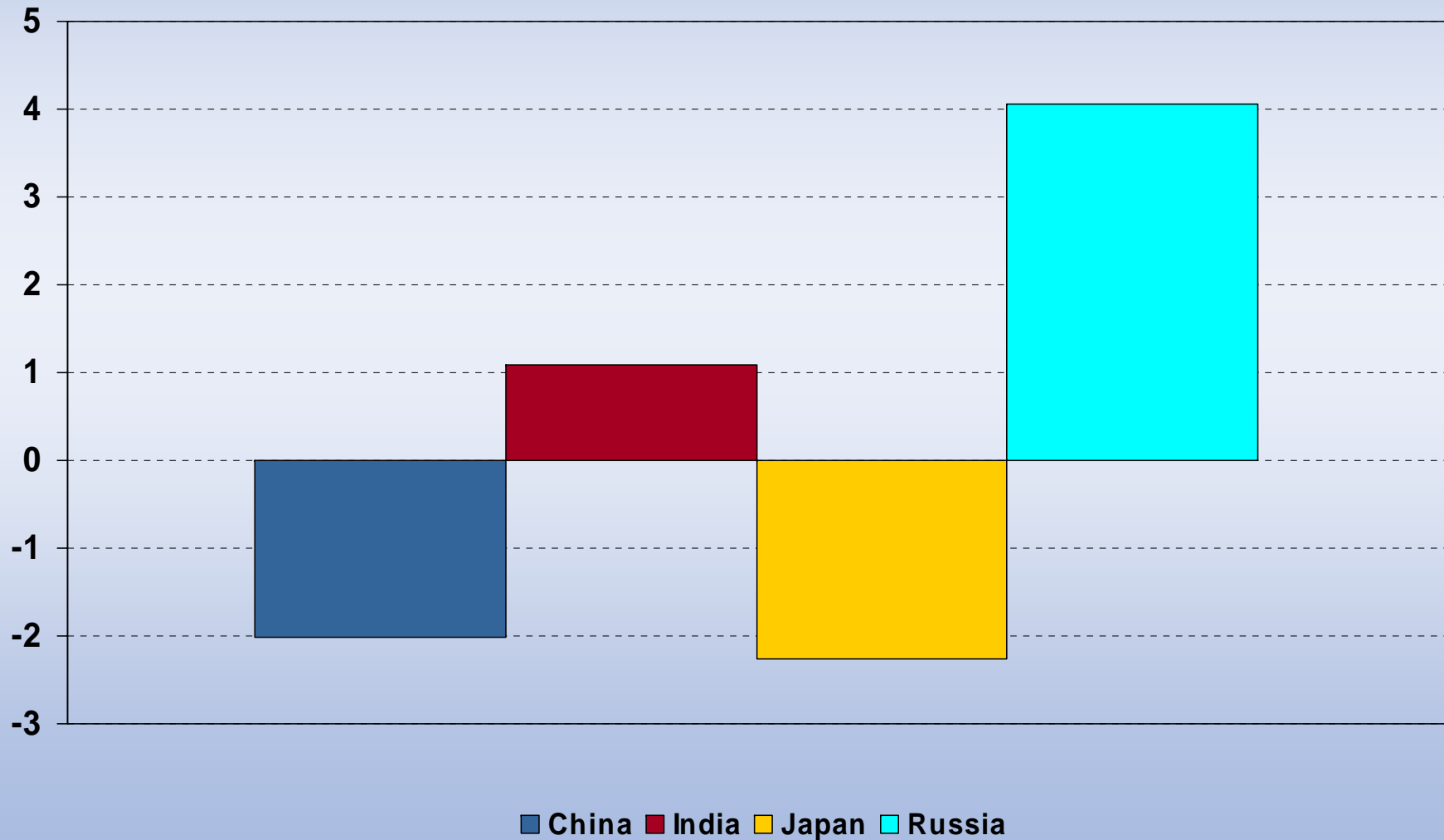
Percent



■ Australia ■ Brazil ■ European Union ■ Thailand

# Average Exchange Rate Growth for Major Importers

Percent



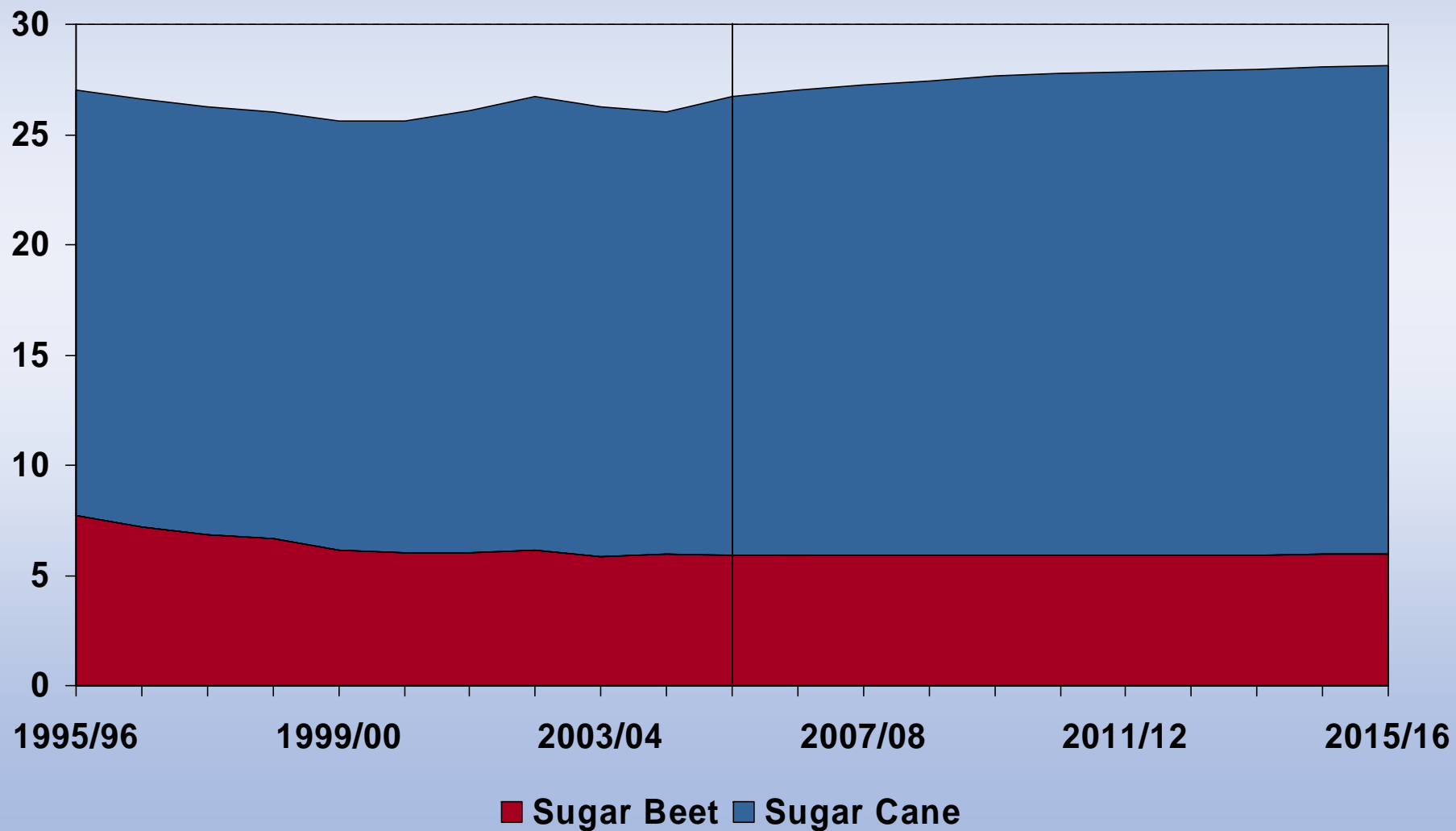
# International Sugar

- World
- Major exporters
- Major importers
- Country coverage

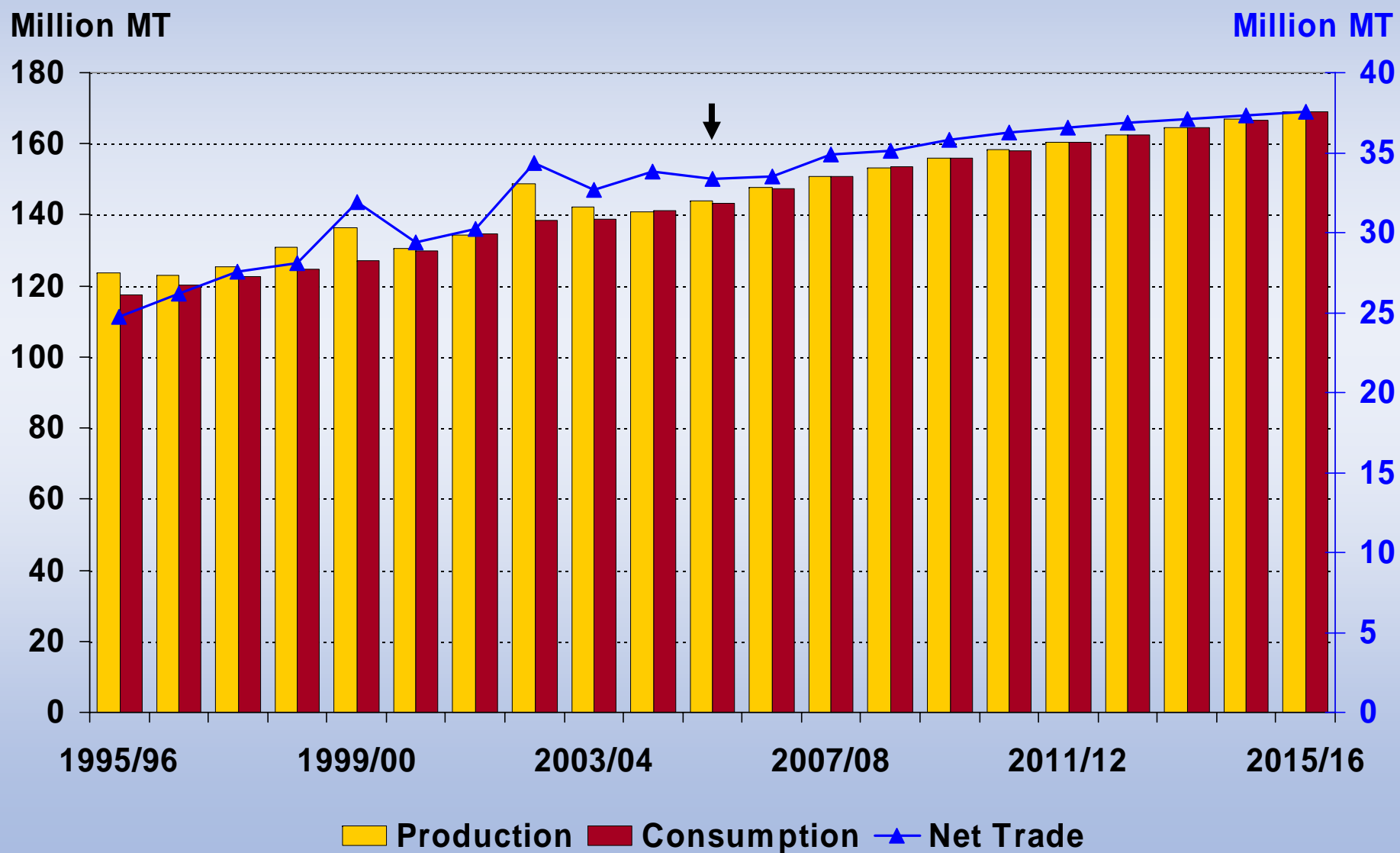


# World Sugarcane and Sugar Beet Area Harvested

Million Hectares



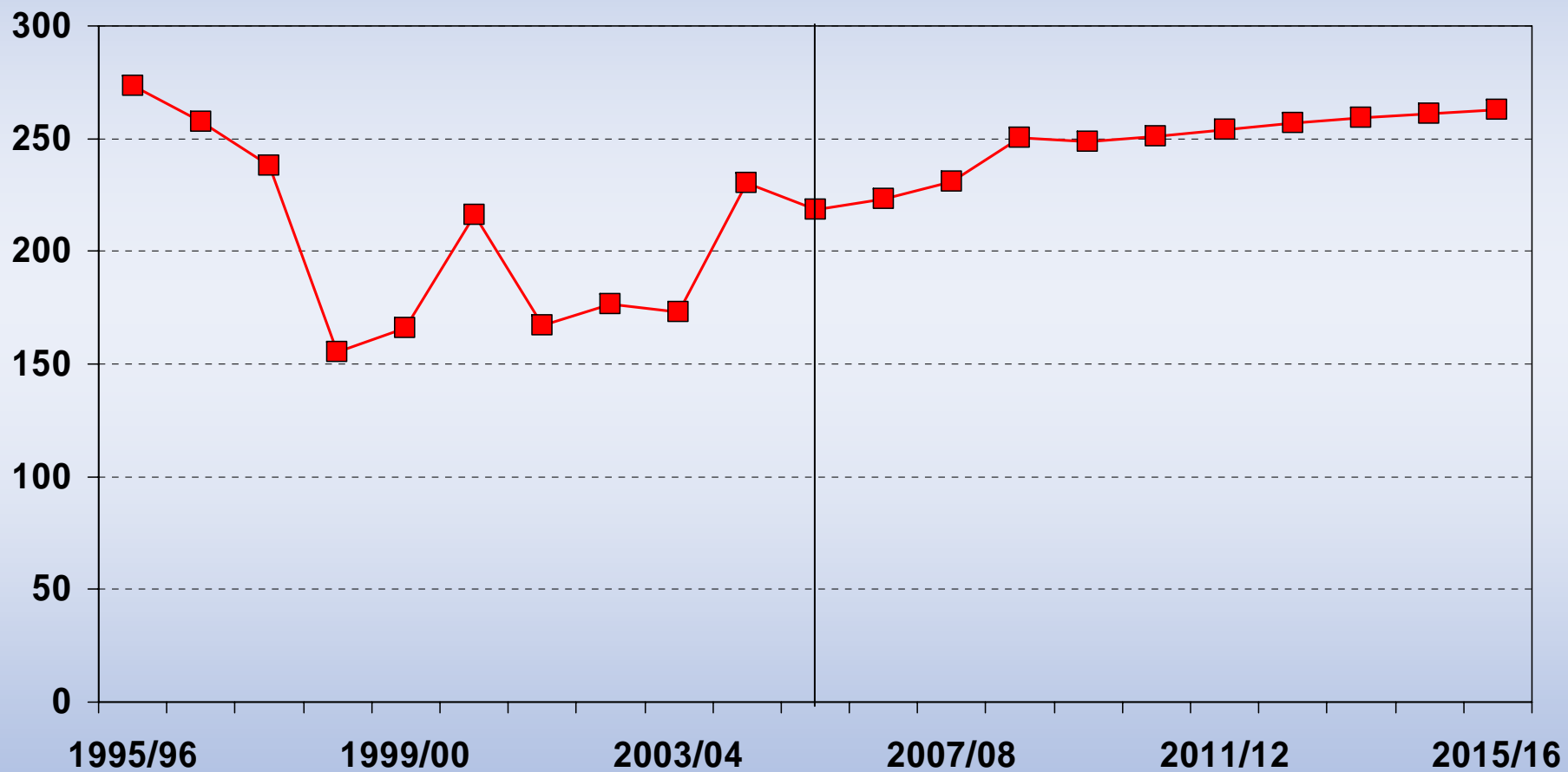
# World Sugar Production, Consumption and Net Trade





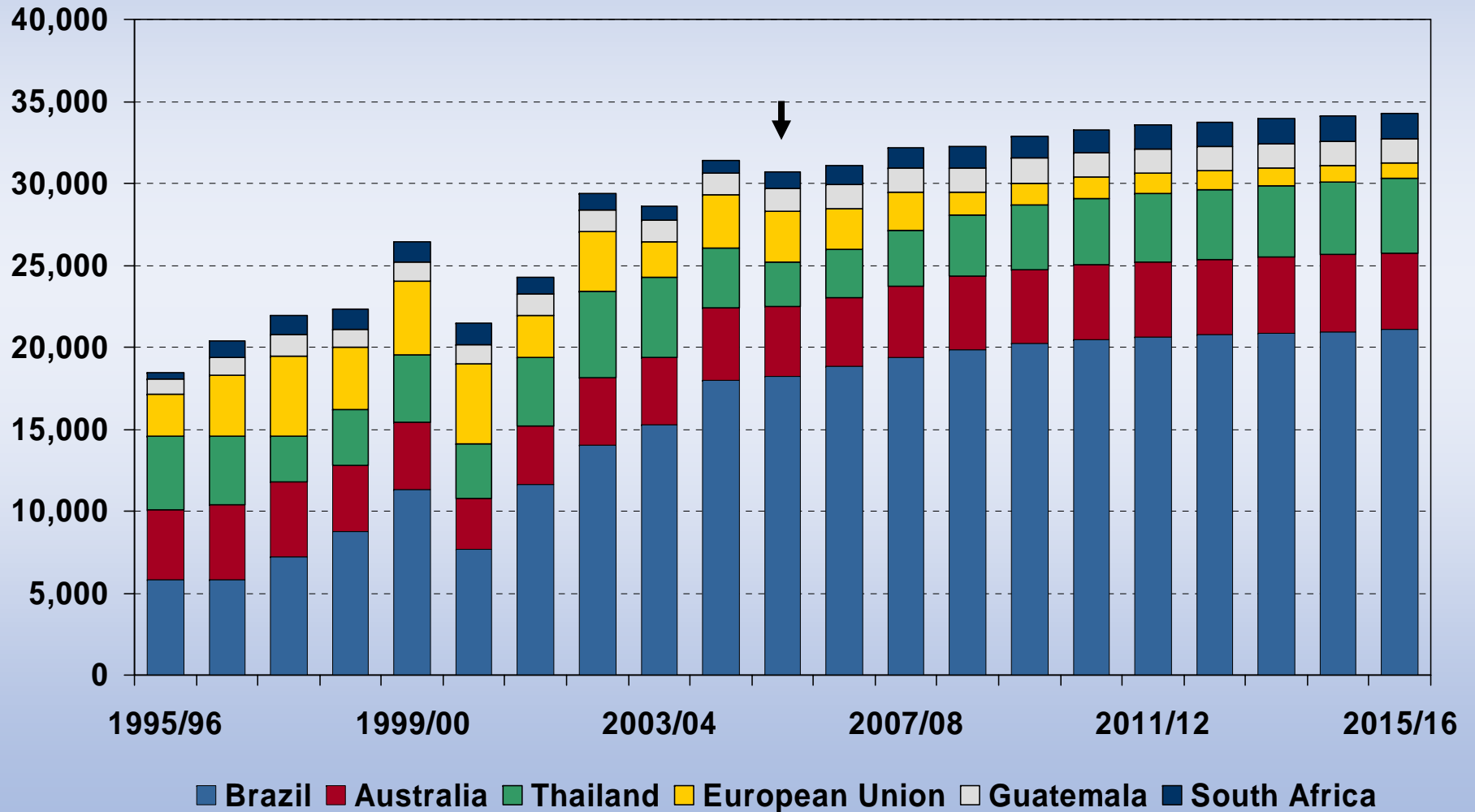
# World Sugar FOB Caribbean Price

Dollars per MT



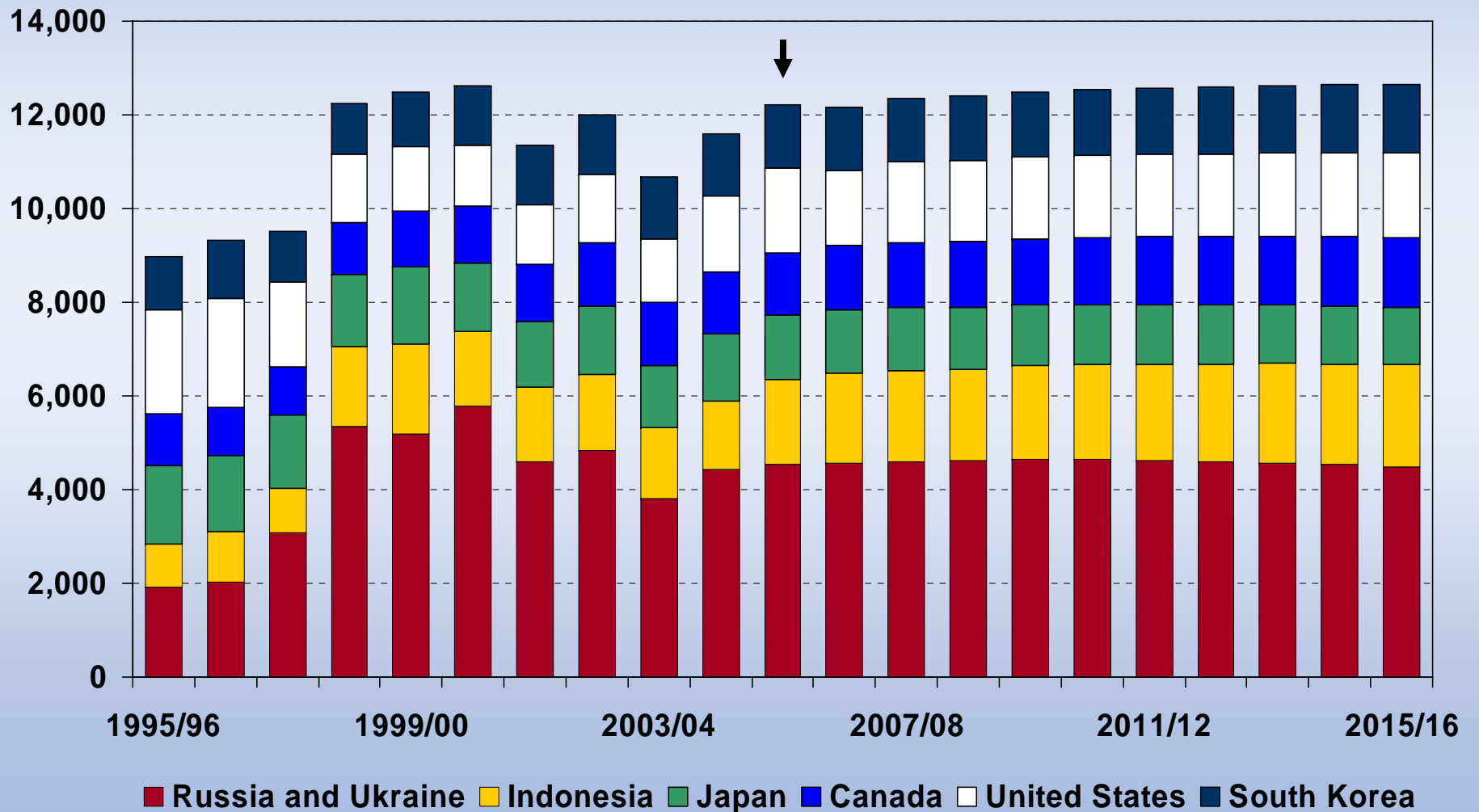
# Major Sugar Exporters

Thousand MT



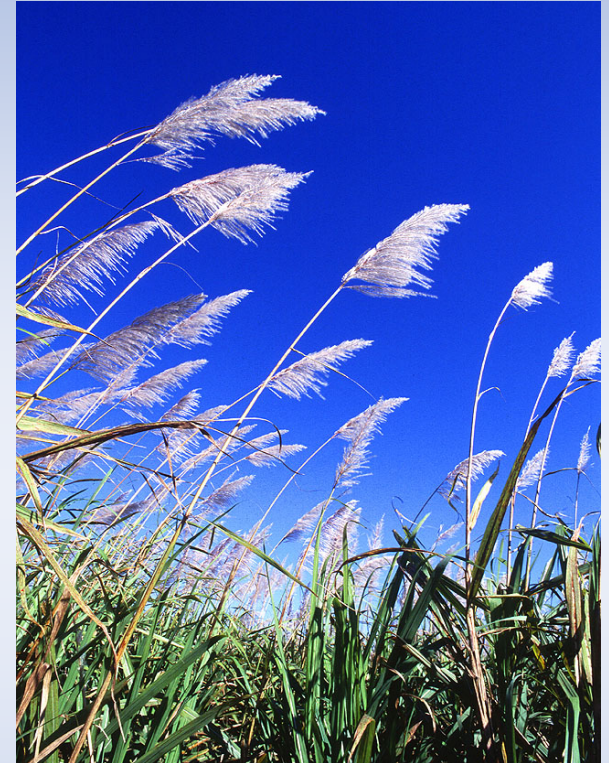
# Major Sugar Importers

Thousand MT



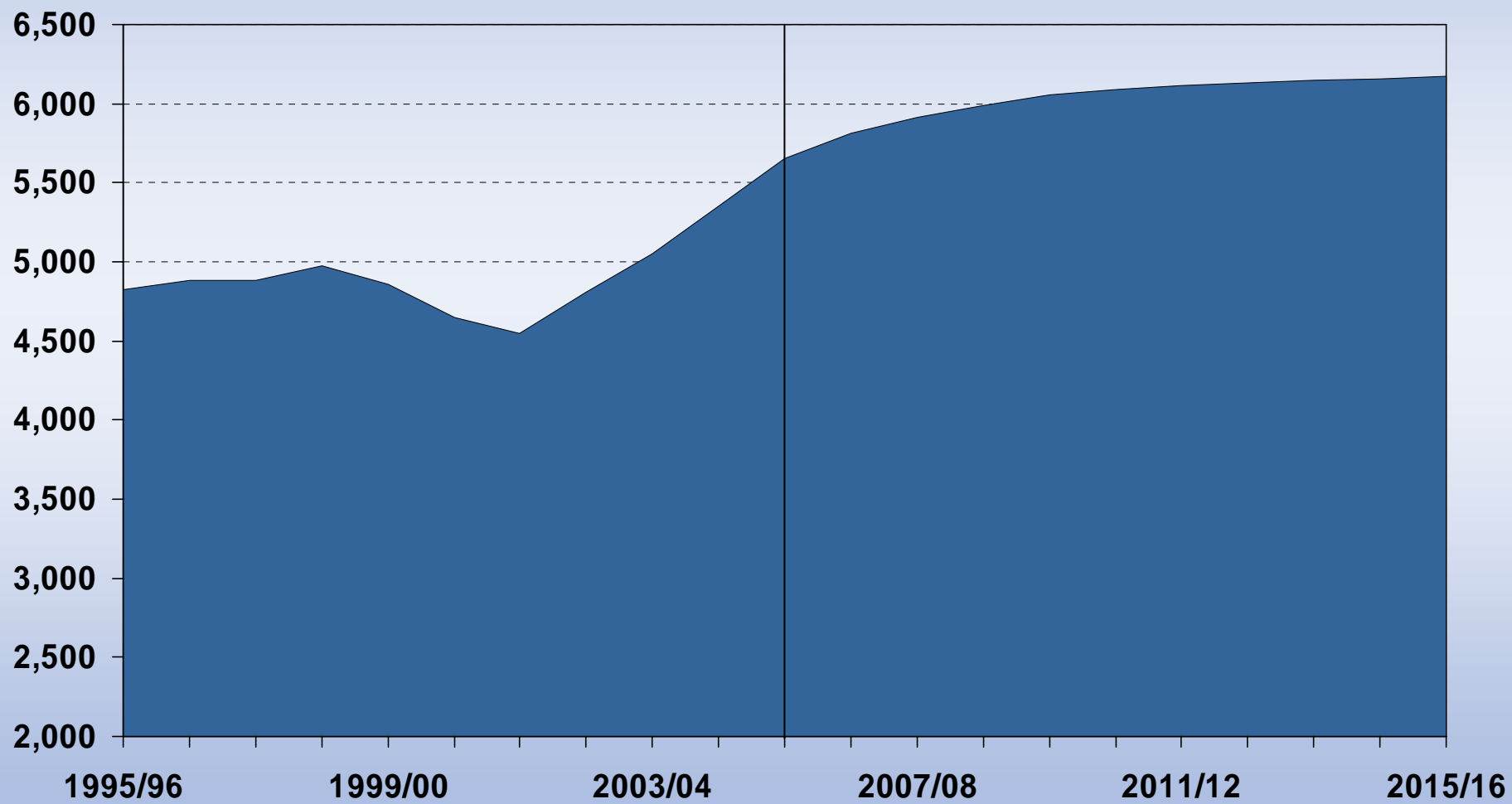
# International Sugar

- Major Exporters
  - Brazil: Continued expansion
  - Reduced production in Thailand
  - Recovery in Australia
  - Sugar for Ethanol (Brazil, Australia, Thailand)



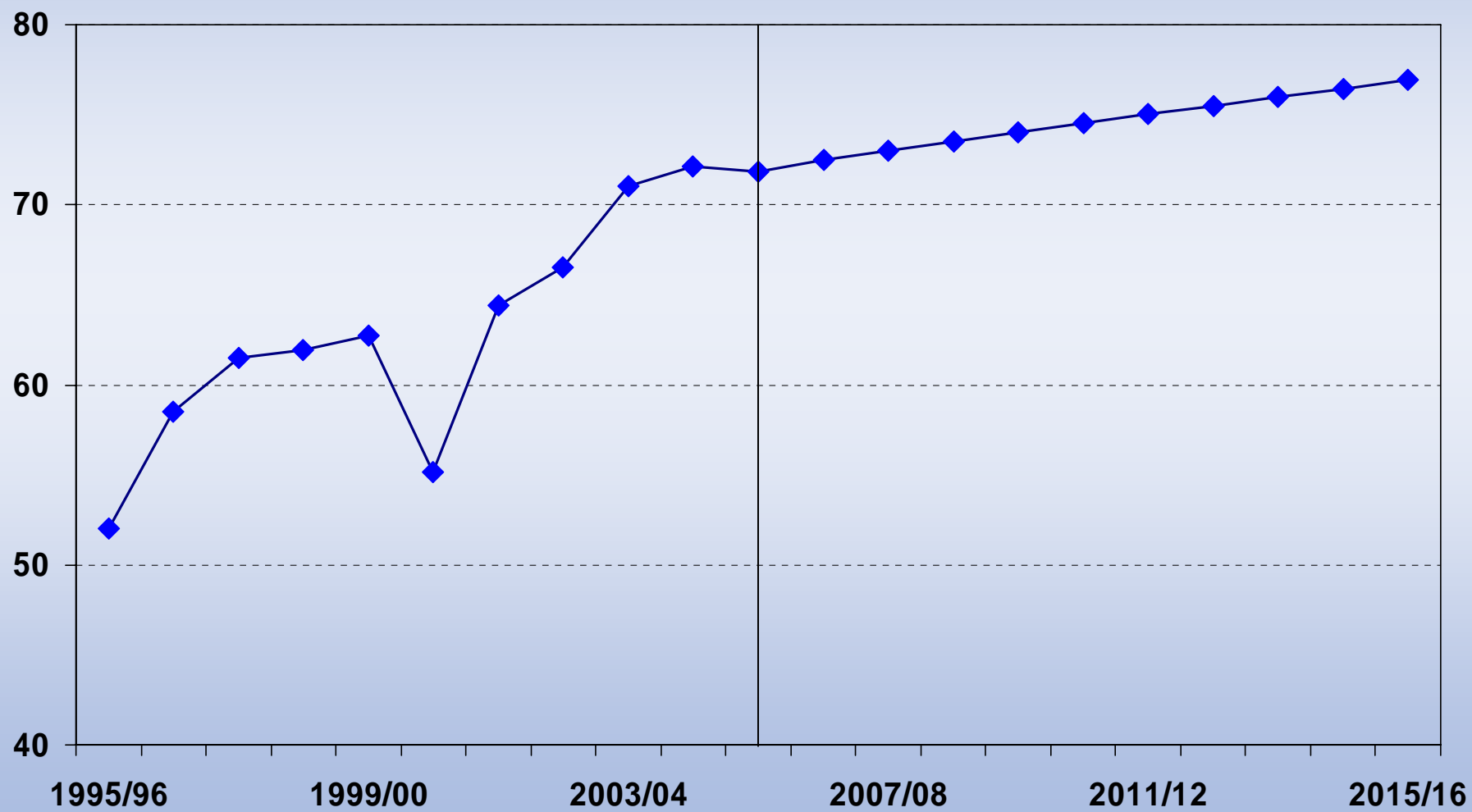
# Brazilian Sugarcane Area Harvested

Thousand  
Hectares

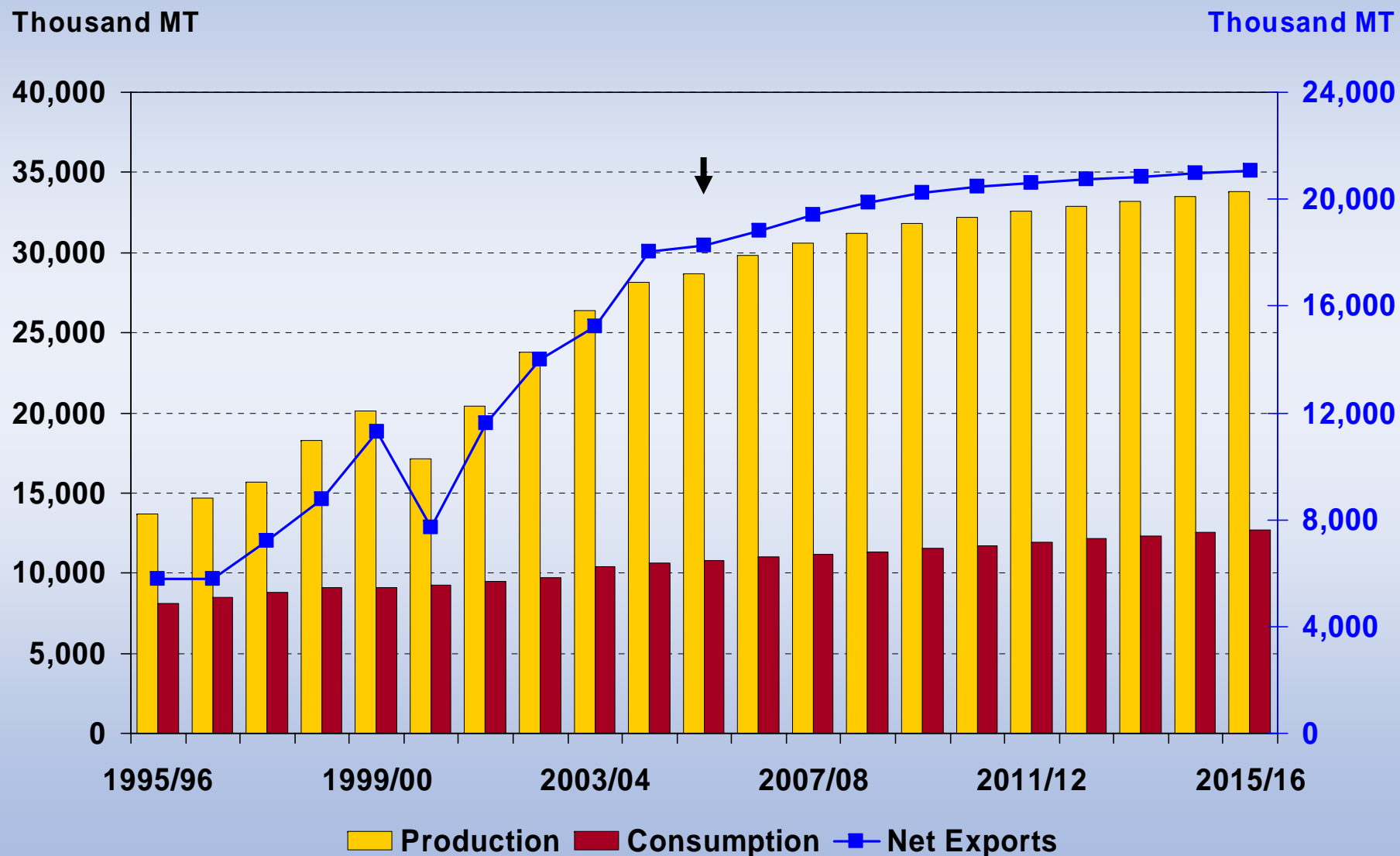


# Brazilian Yield

MT per Hectare

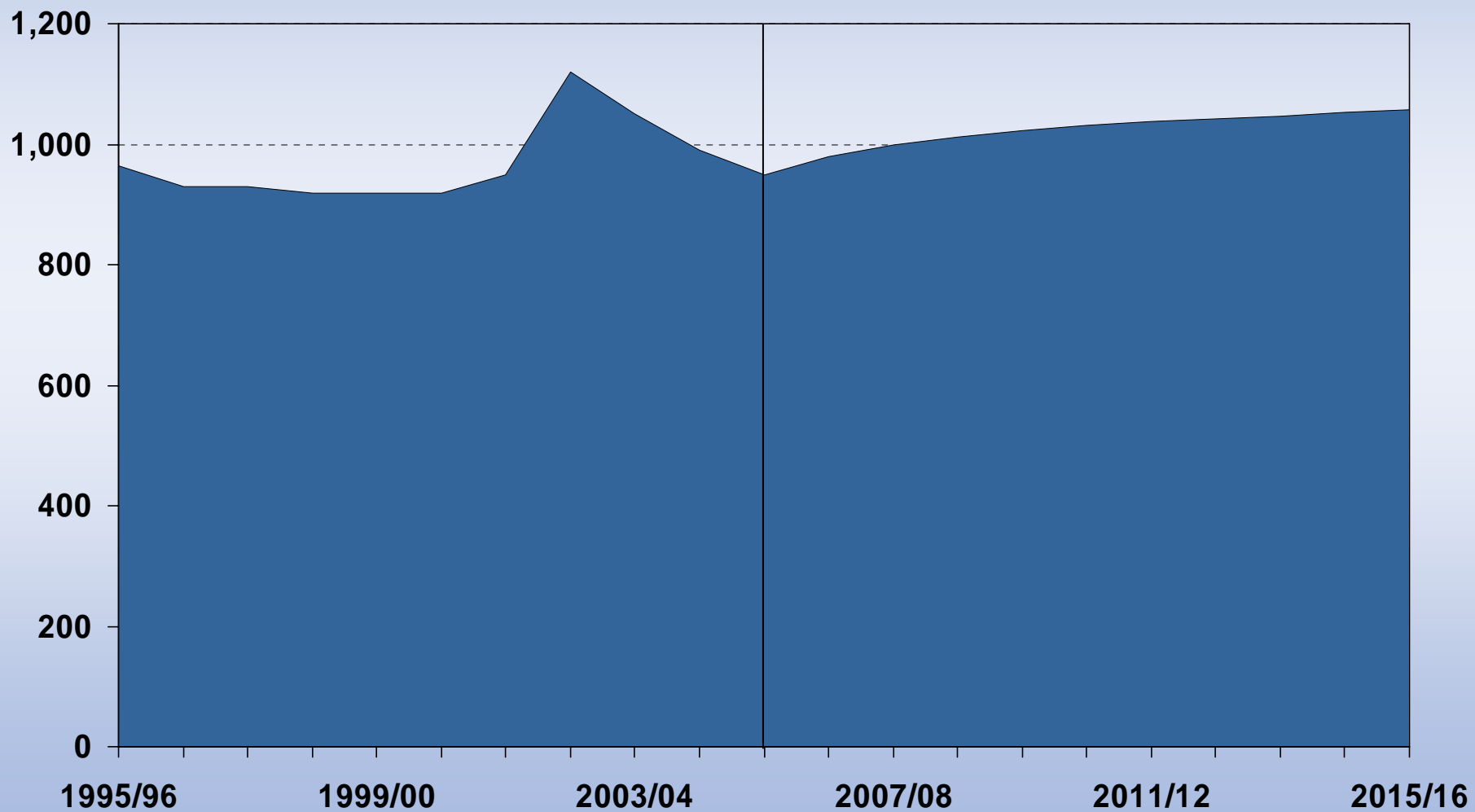


# Brazilian Production, Consumption and Net Exports



# Thai Sugarcane Area Harvested

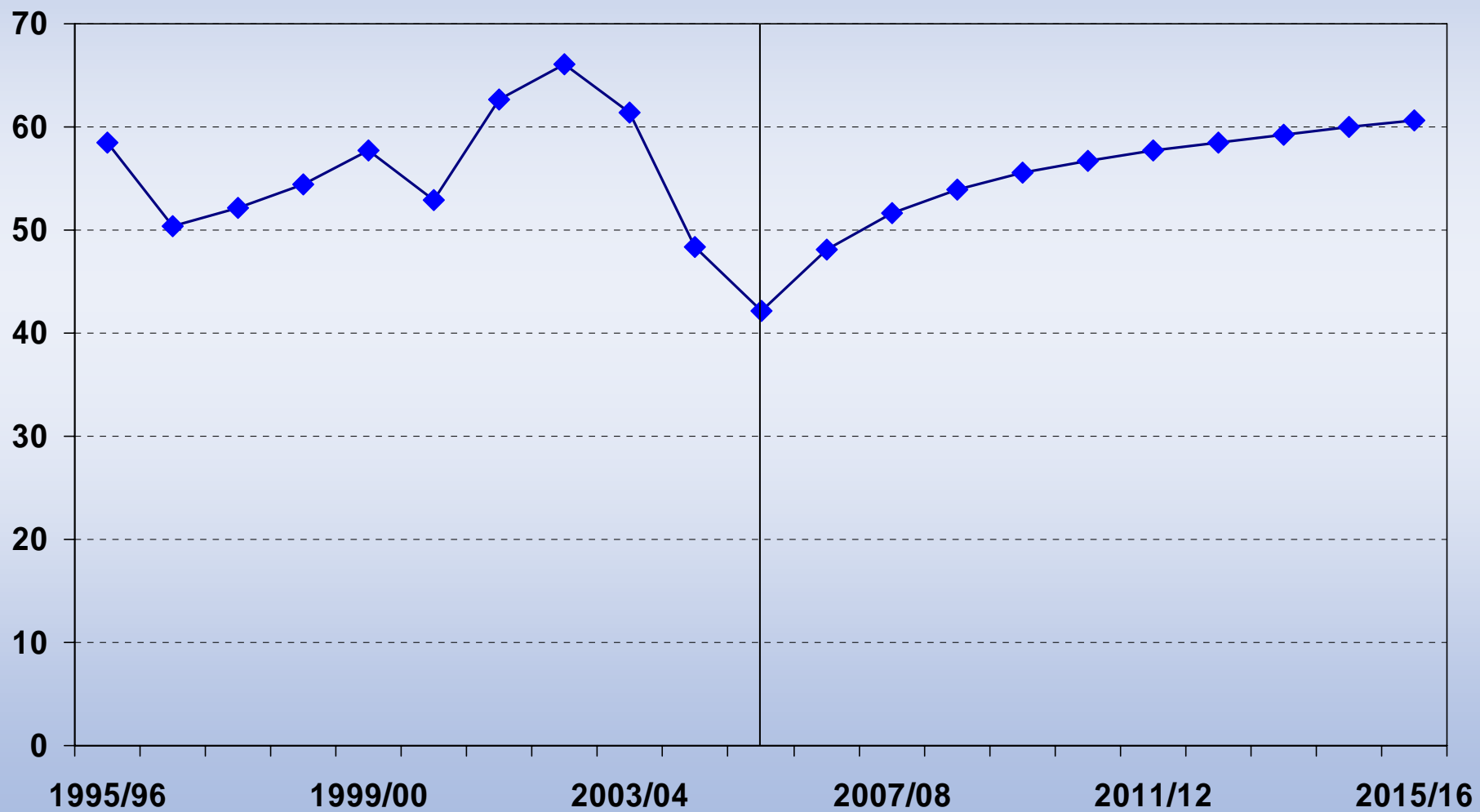
Thousand  
Hectares





# Thai Yield

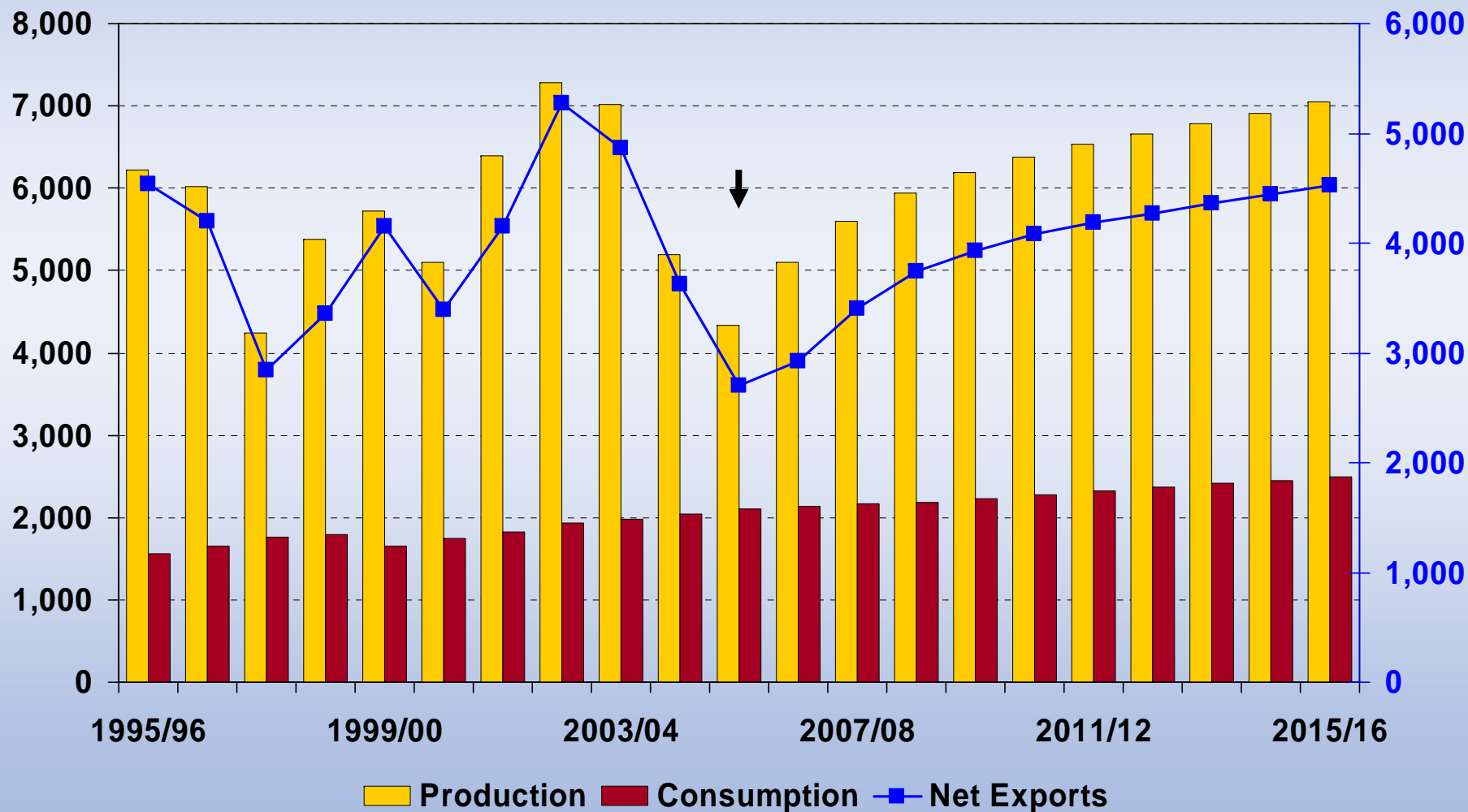
MT per Hectare



# Thai Production, Consumption and Net Exports

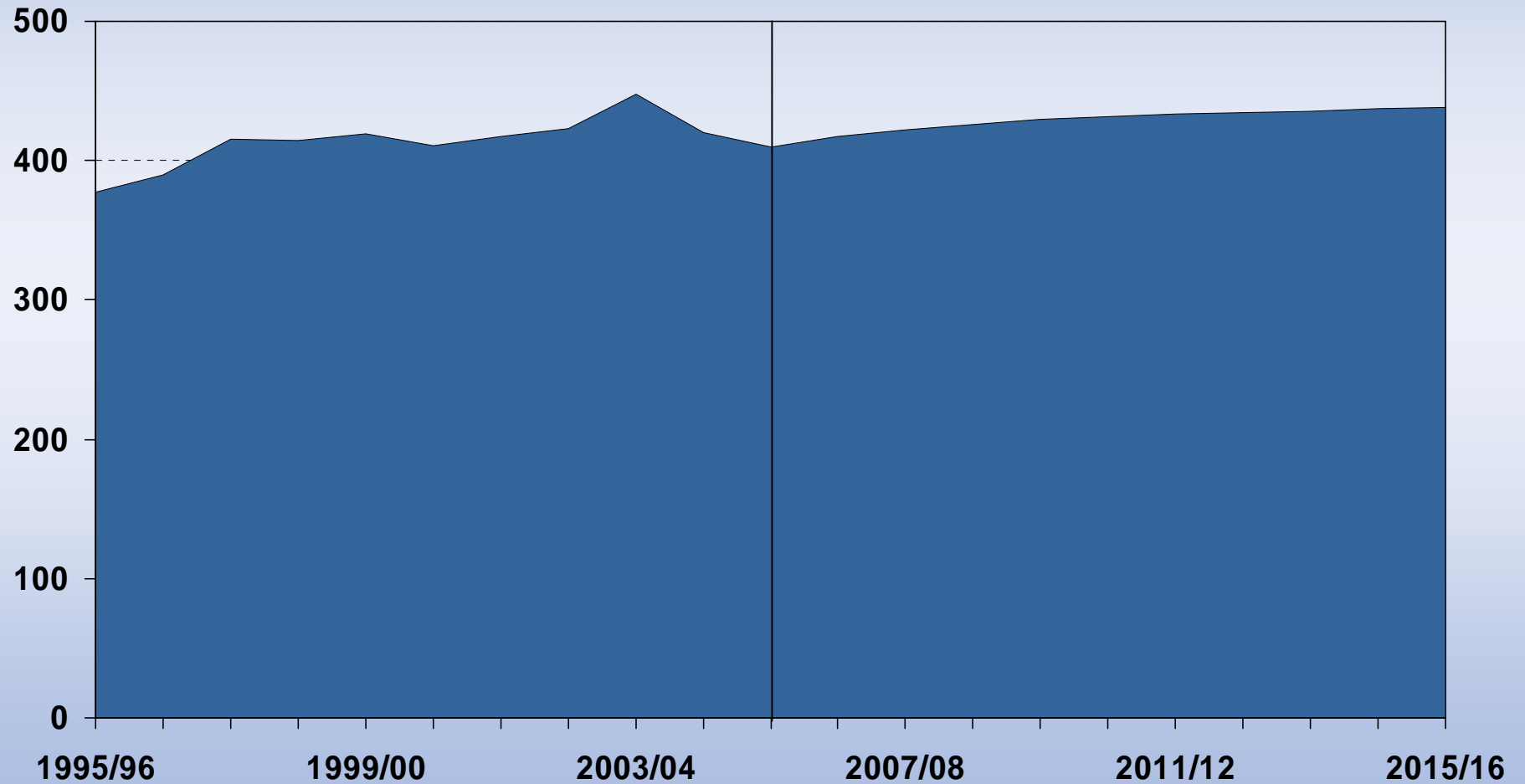
Thousand MT

Thousand MT



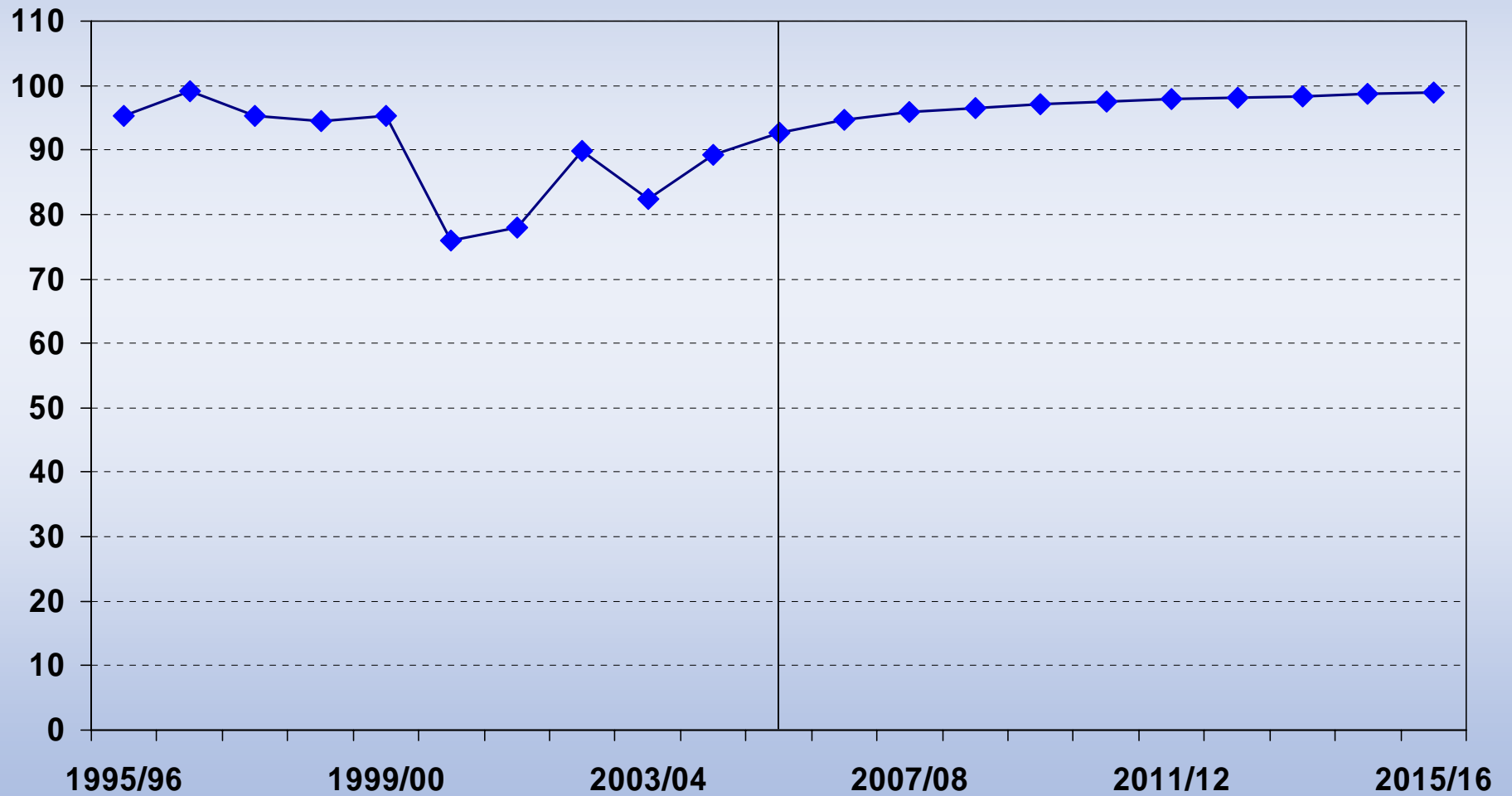
# Australian Sugarcane Area Harvested

Thousand  
Hectares



# Australian Yield

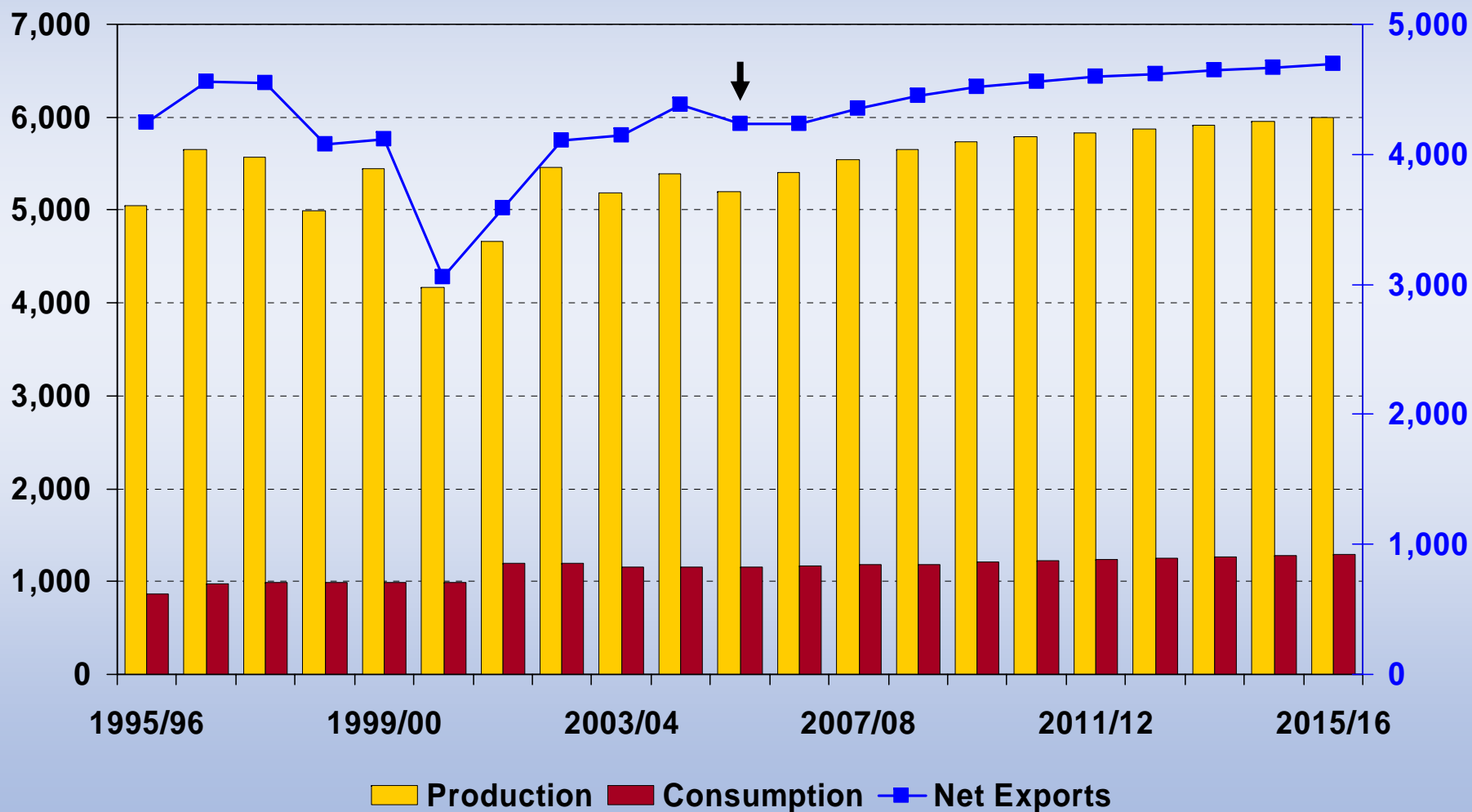
MT per Hectare



# Australian Production, Consumption and Net Exports

Thousand MT

Thousand MT



# International Sugar

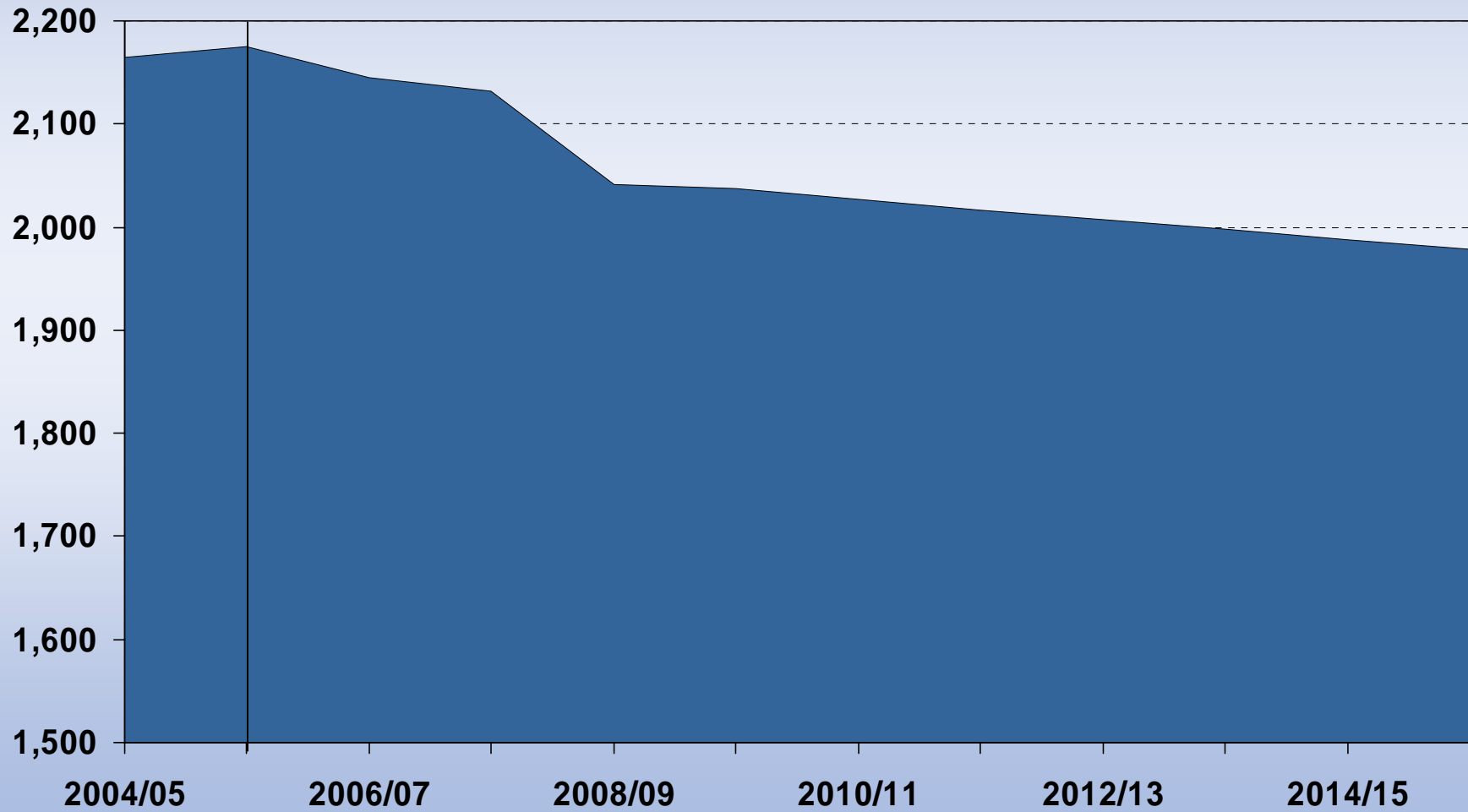


## ■ EU-25

- Implementation of new sugar reforms will change the picture in the EU
  - A 36% cut in the institutional white sugar price over 4 years from 2006
  - Reduction in the minimum beet price by 39.5%
  - A and B quotas merged into one production quota
  - Additional 1.1 million tons of “C” sugar against one-off payment
  - Voluntary restructuring buy-up scheme

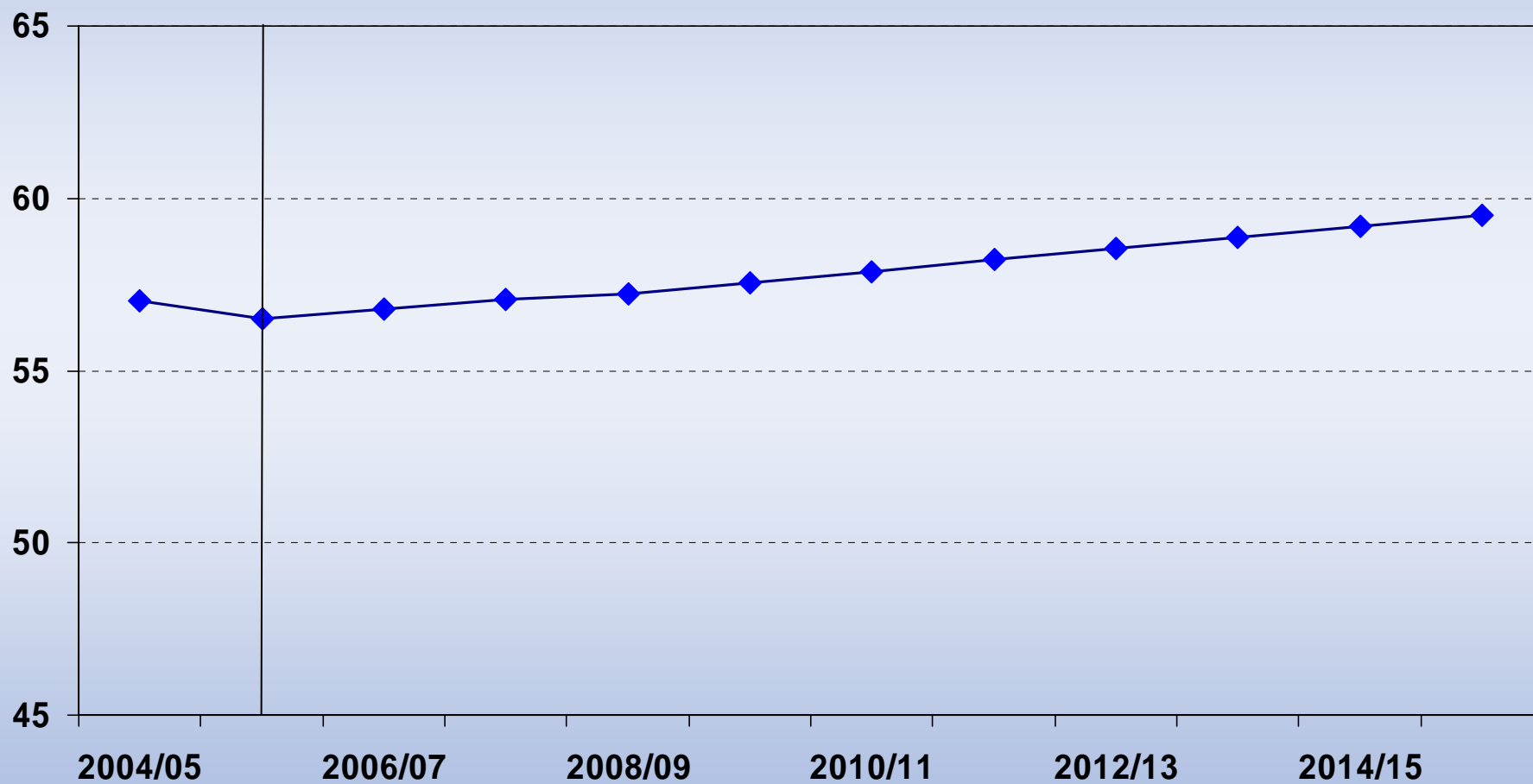
# EU-25 Sugar Beet Area Harvested

Thousand  
Hectares



# EU-25 Yield

MT per Hectare

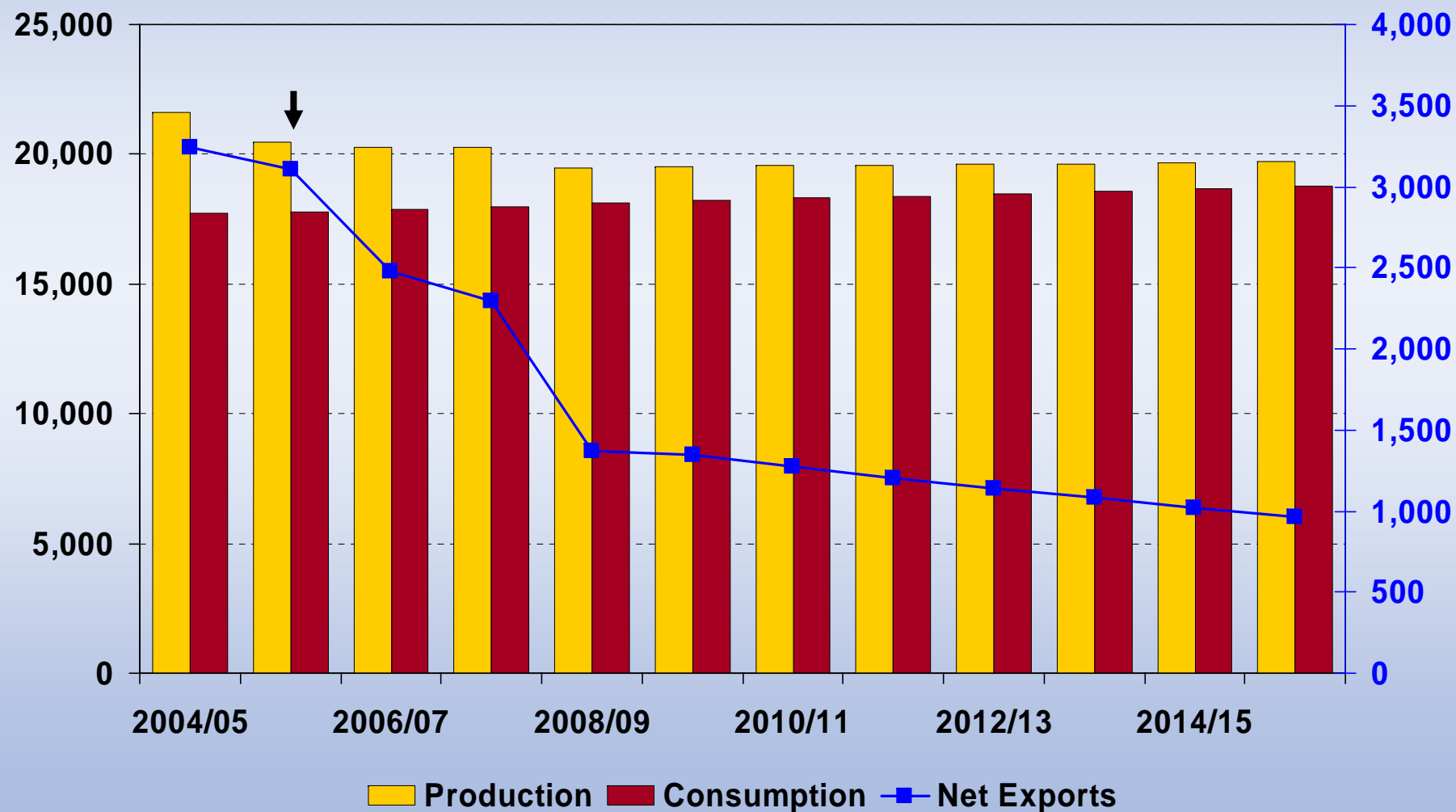




# EU-25 Production, Consumption and Net Exports

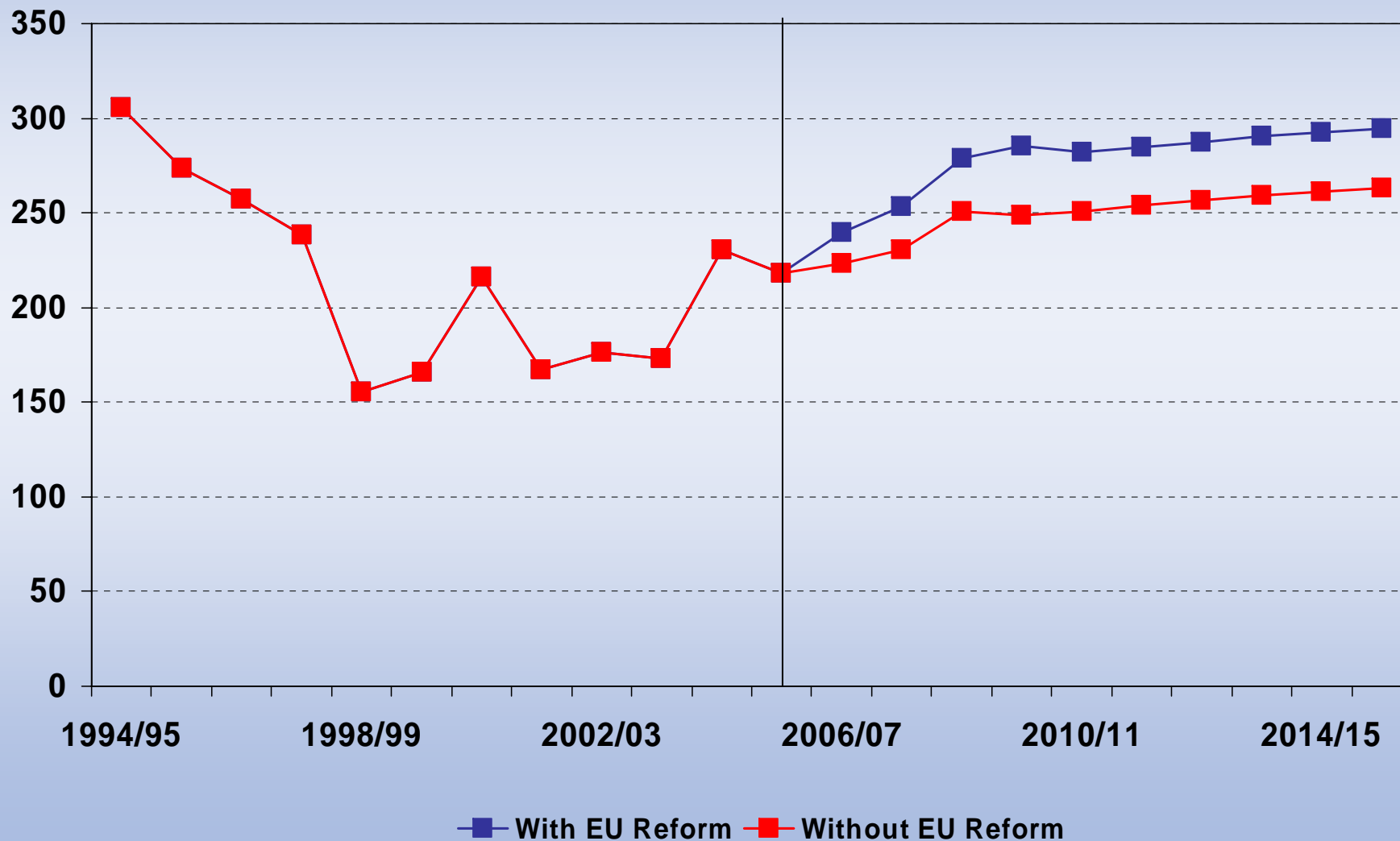
Thousand MT

Thousand MT



# World Sugar FOB Caribbean Price

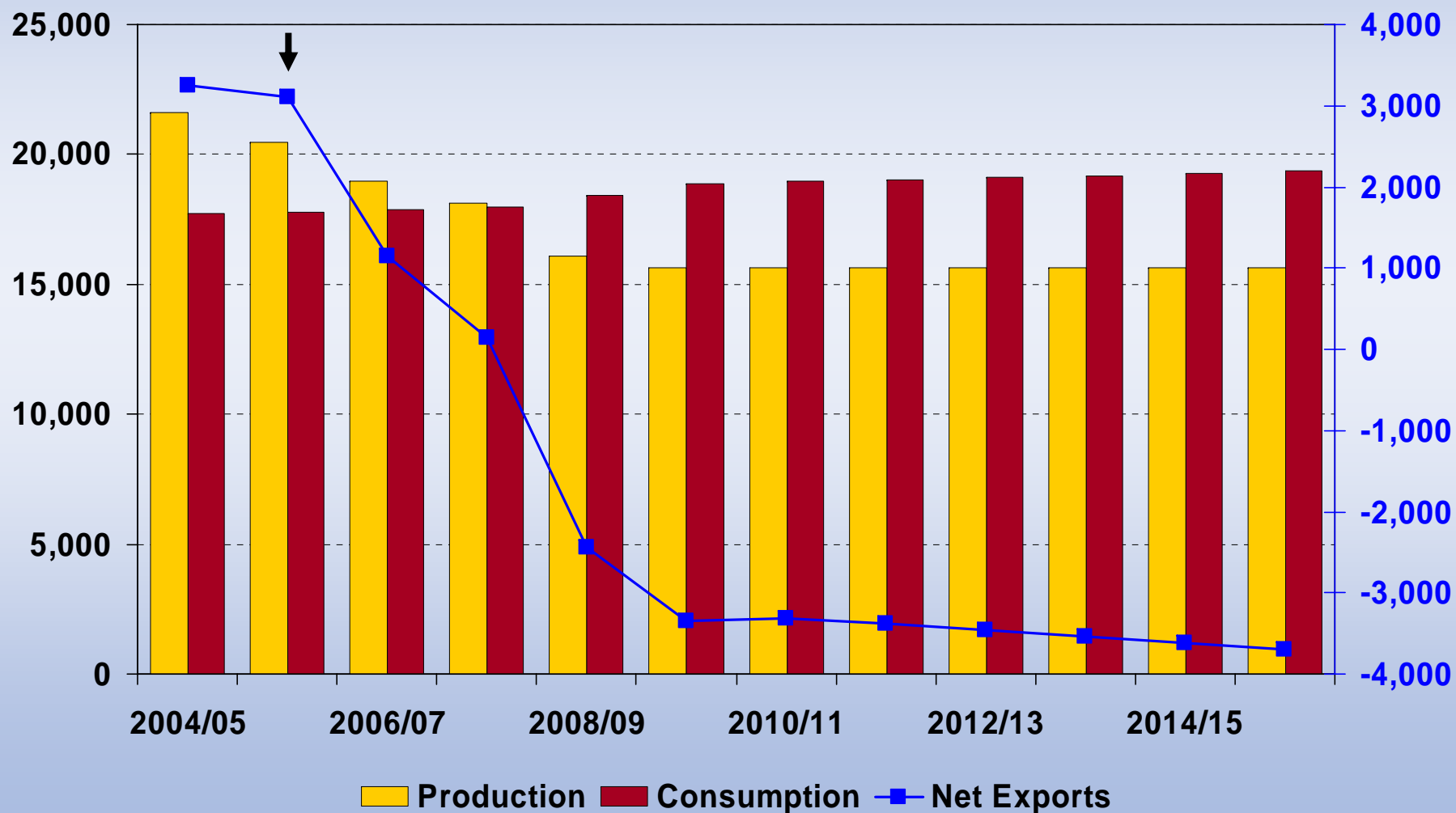
Dollars per MT



# EU-25 Production, Consumption and Net Exports

Thousand MT

Thousand MT



# International Sugar

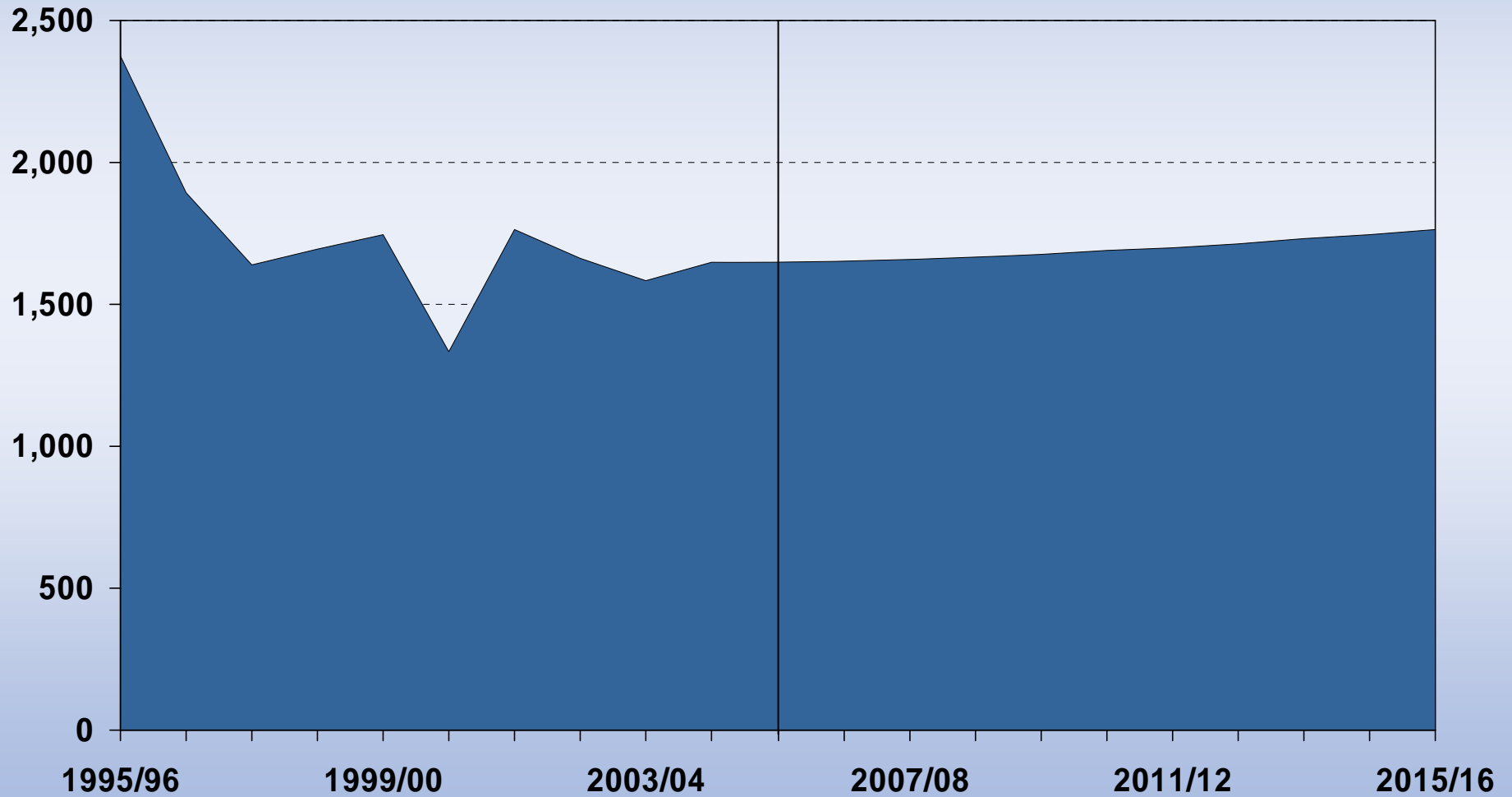
## ■ Major Importers

- Russia and the Ukraine continue to be major importers
- Recovery in China and India
- Japanese imports continue to decline



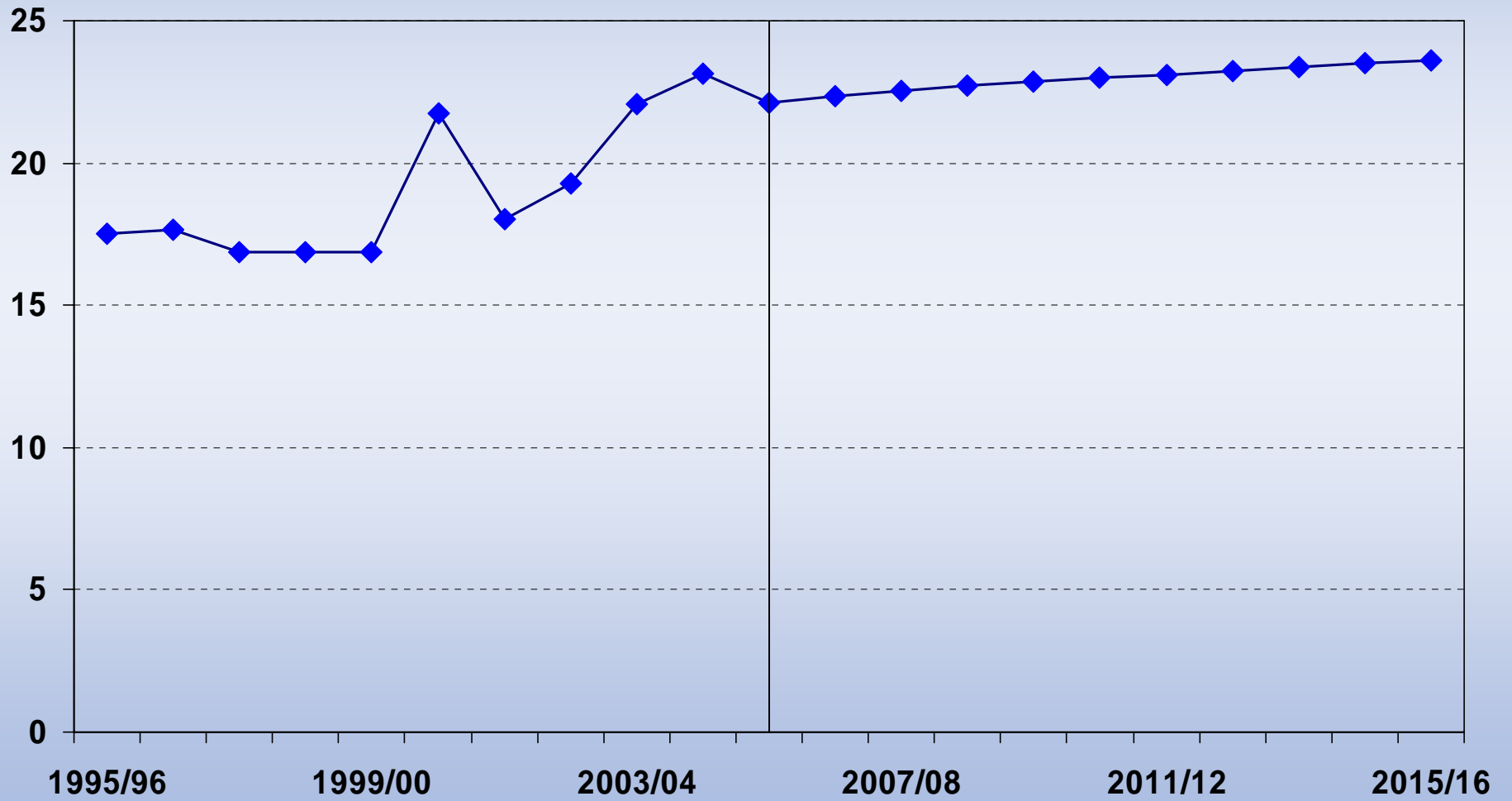
# Russian and Ukrainian Sugar Beet Area Harvested

Thousand Hectares



# Russian and Ukrainian Yield

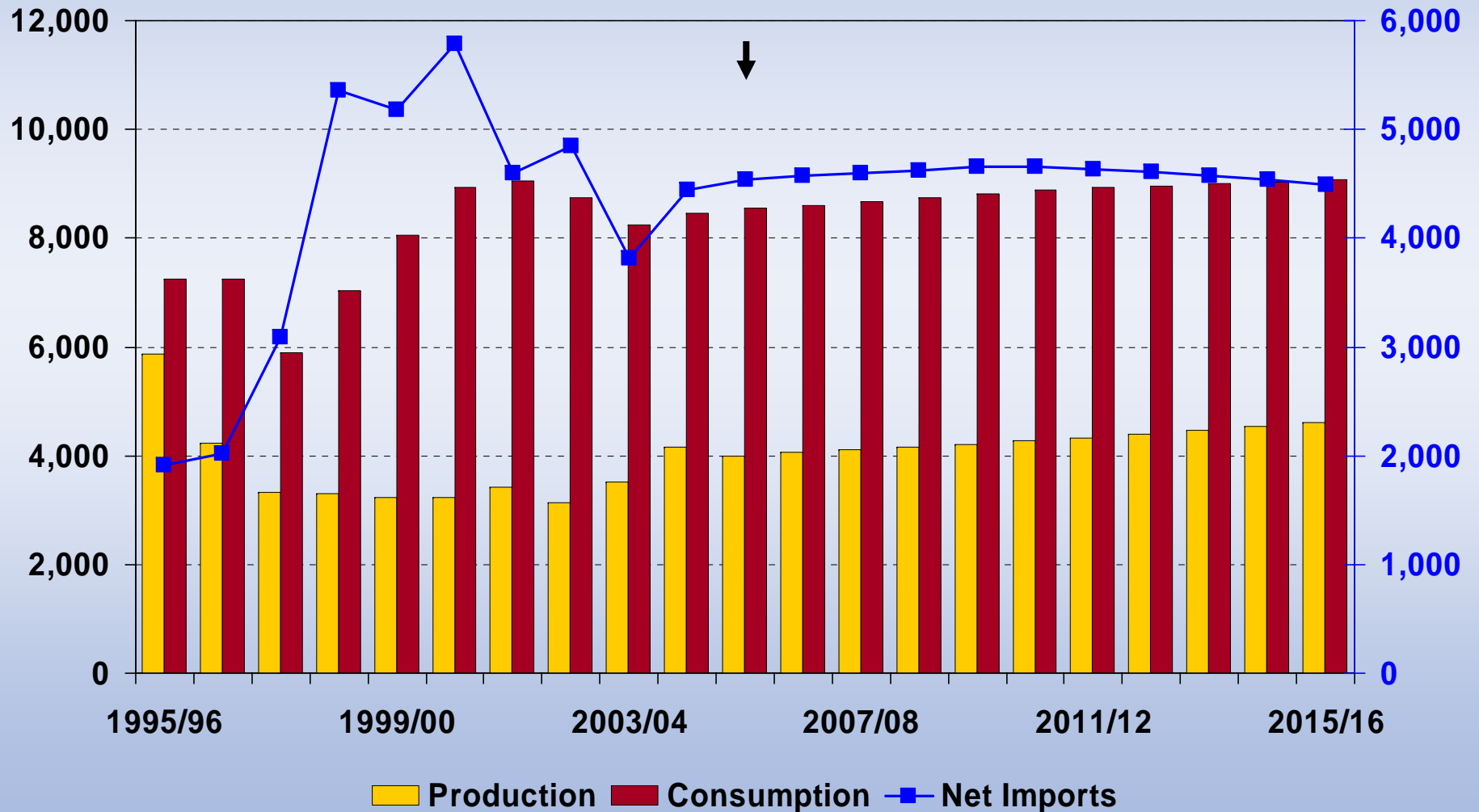
MT per Hectare



# Russian and Ukrainian Production, Consumption and Net Imports

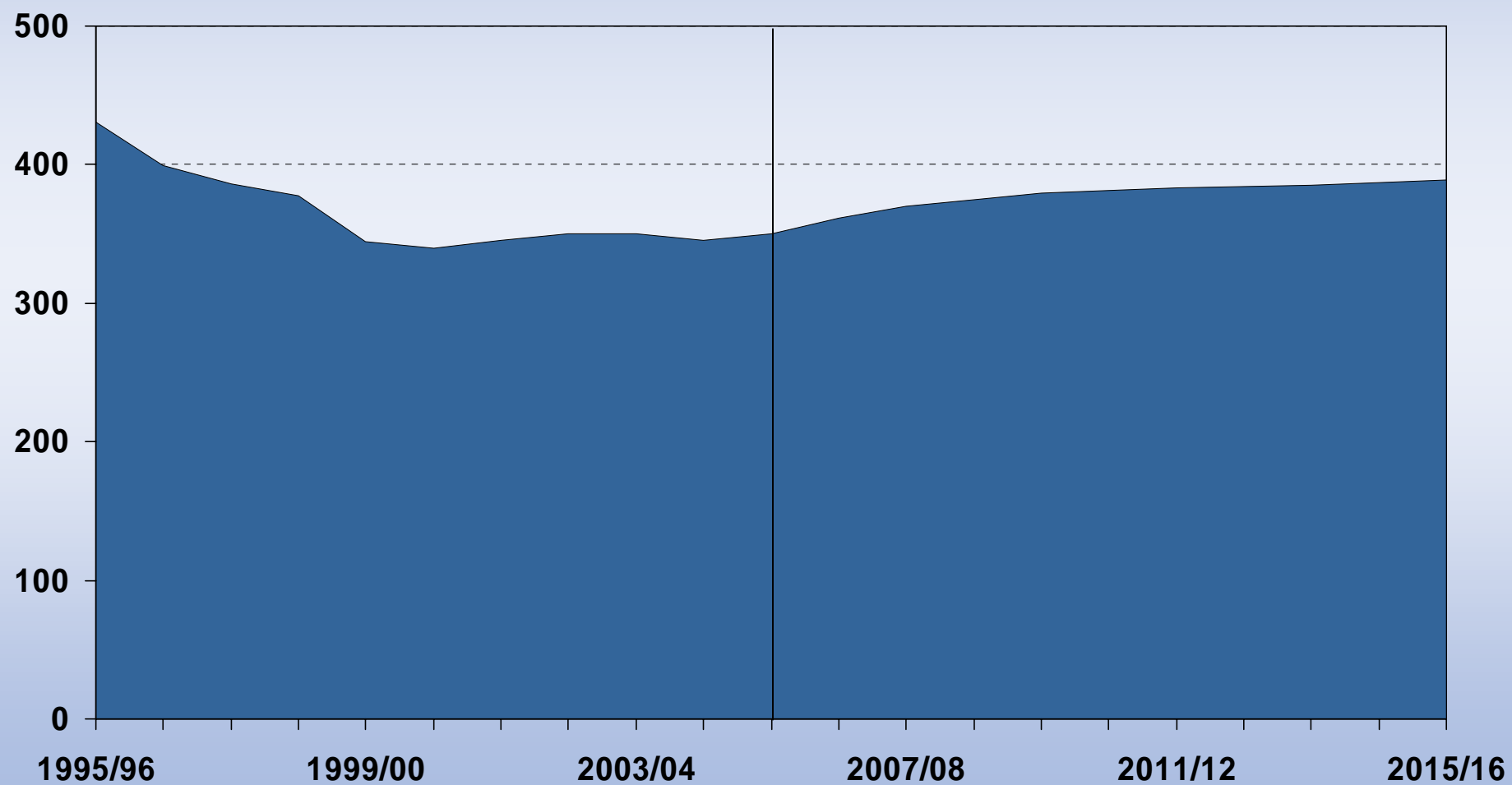
Thousand MT

Thousand MT



# Indonesian Sugarcane Area Harvested

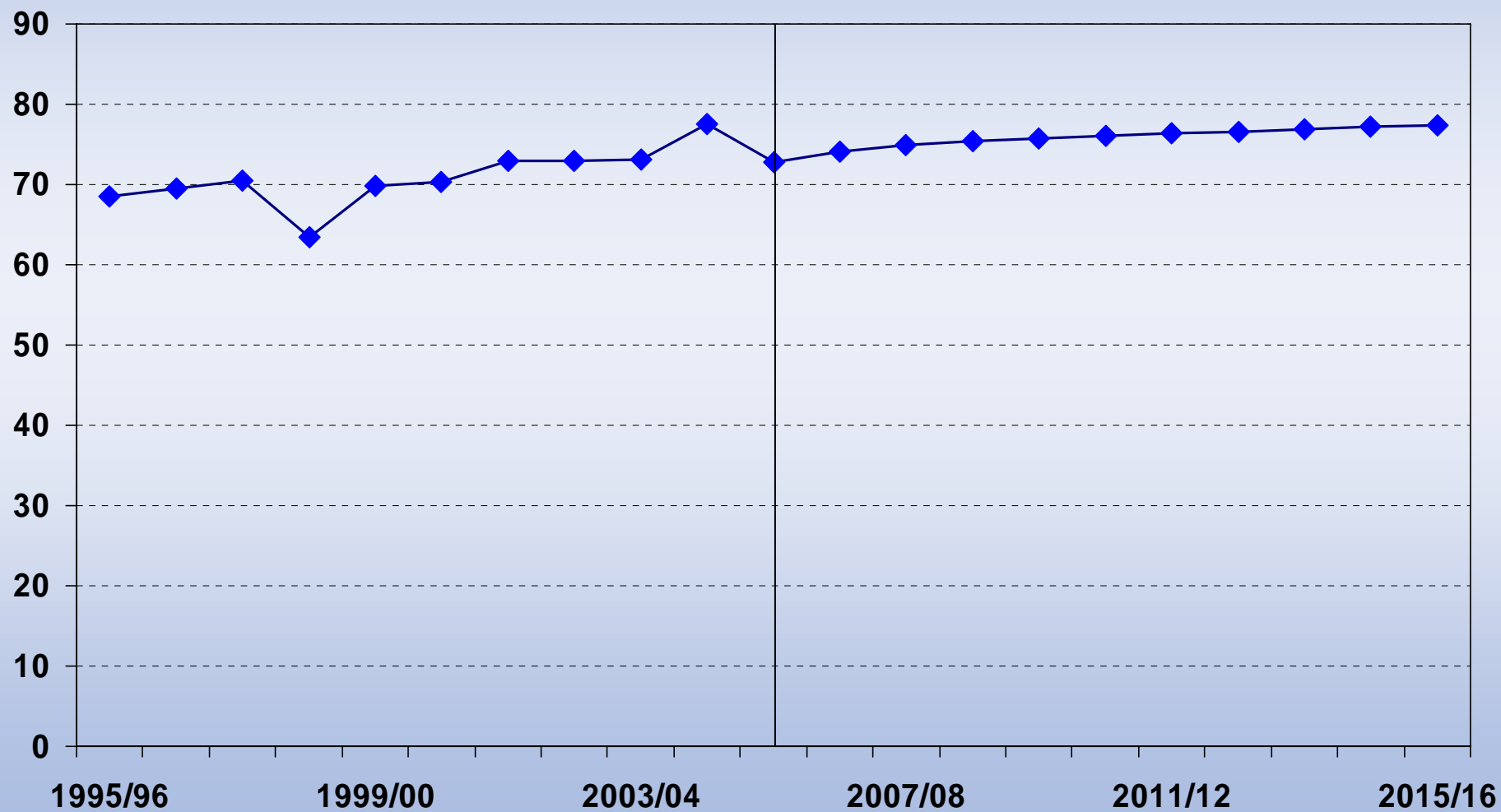
Thousand Hectares



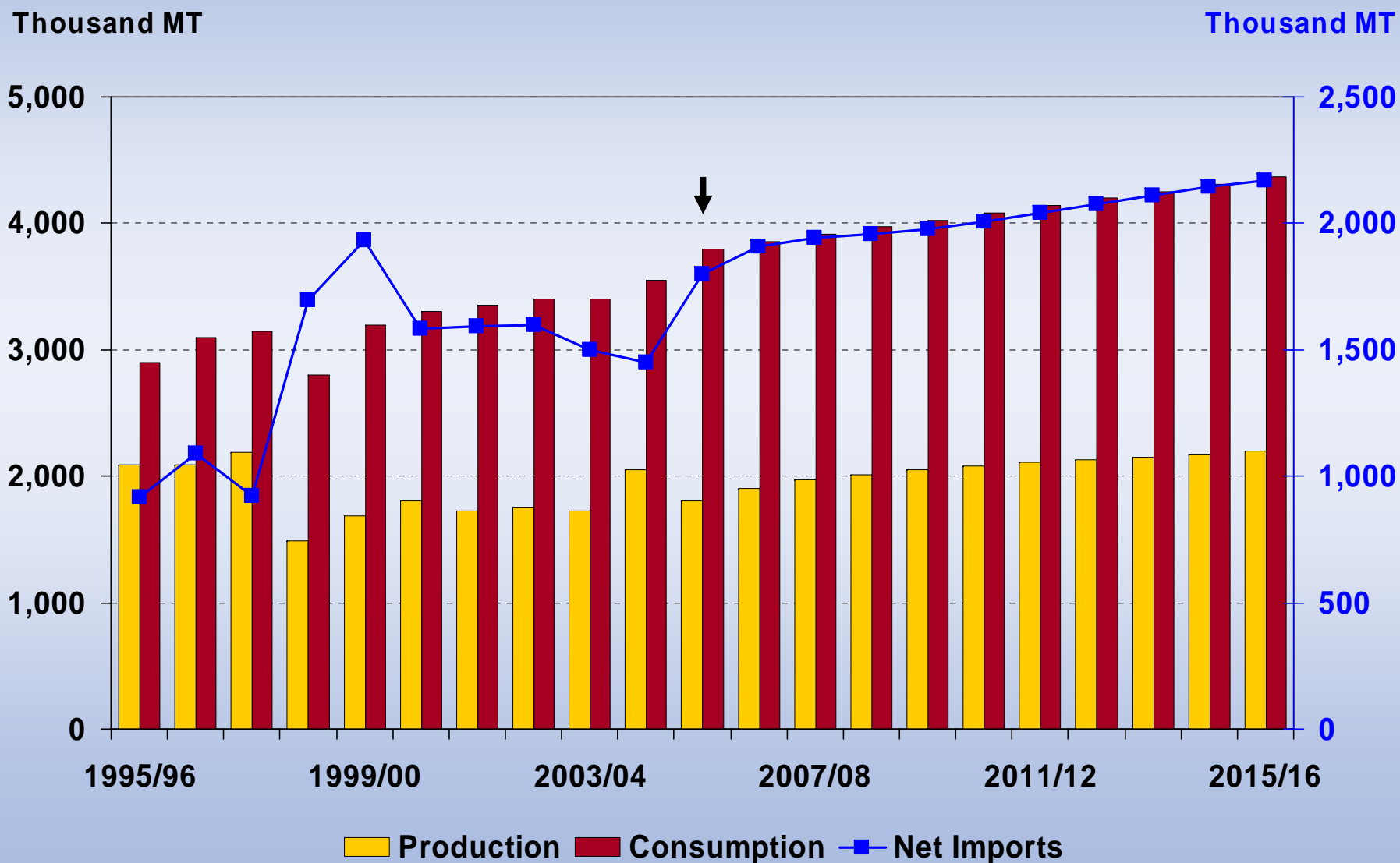


# Indonesian Yield

MT per Hectare

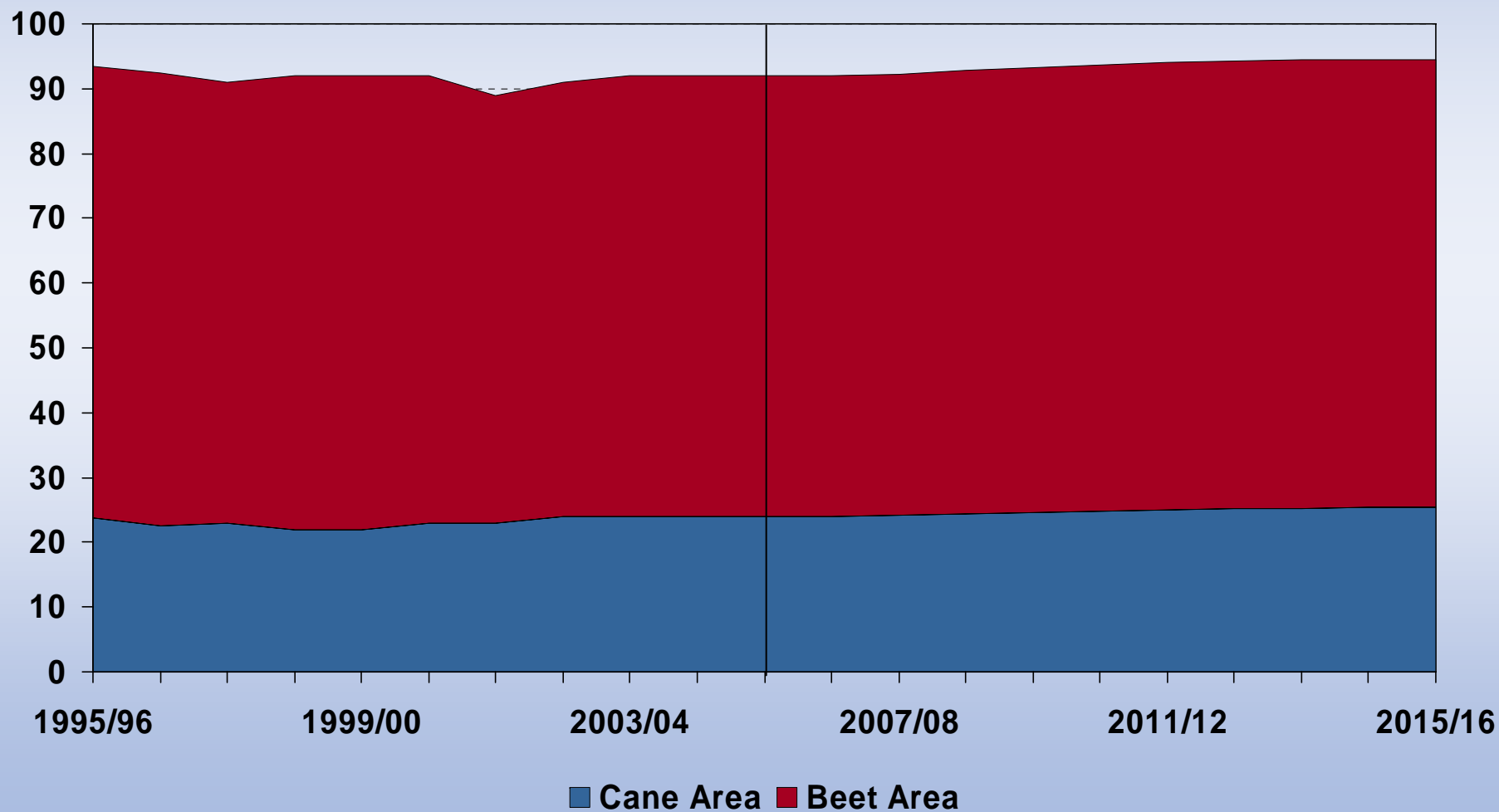


# Indonesian Production, Consumption and Net Imports



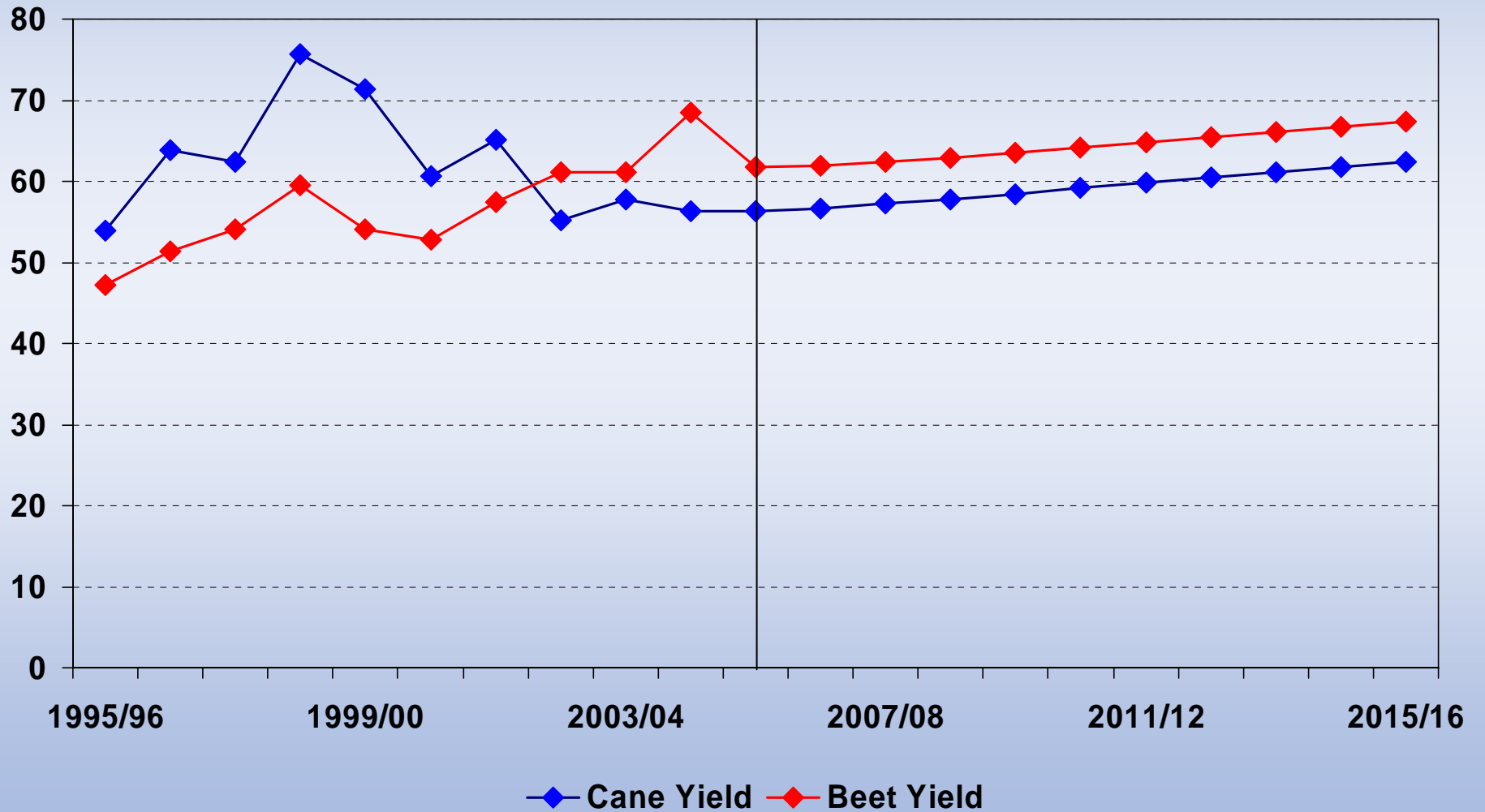
# Japanese Sugarcane and Sugar Beet Area Harvested

Thousand  
Hectares

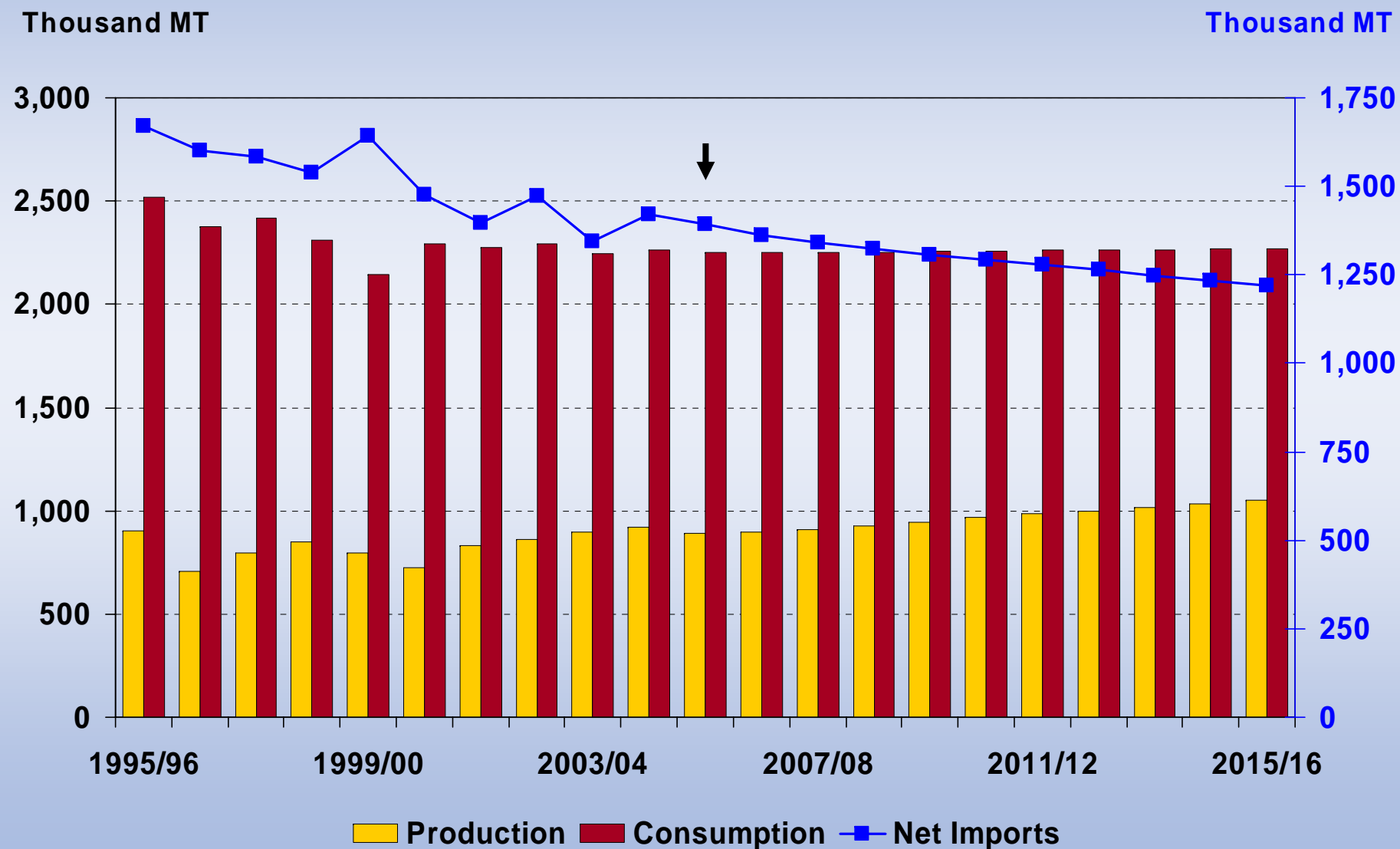


# Japanese Yield

MT per Hectare

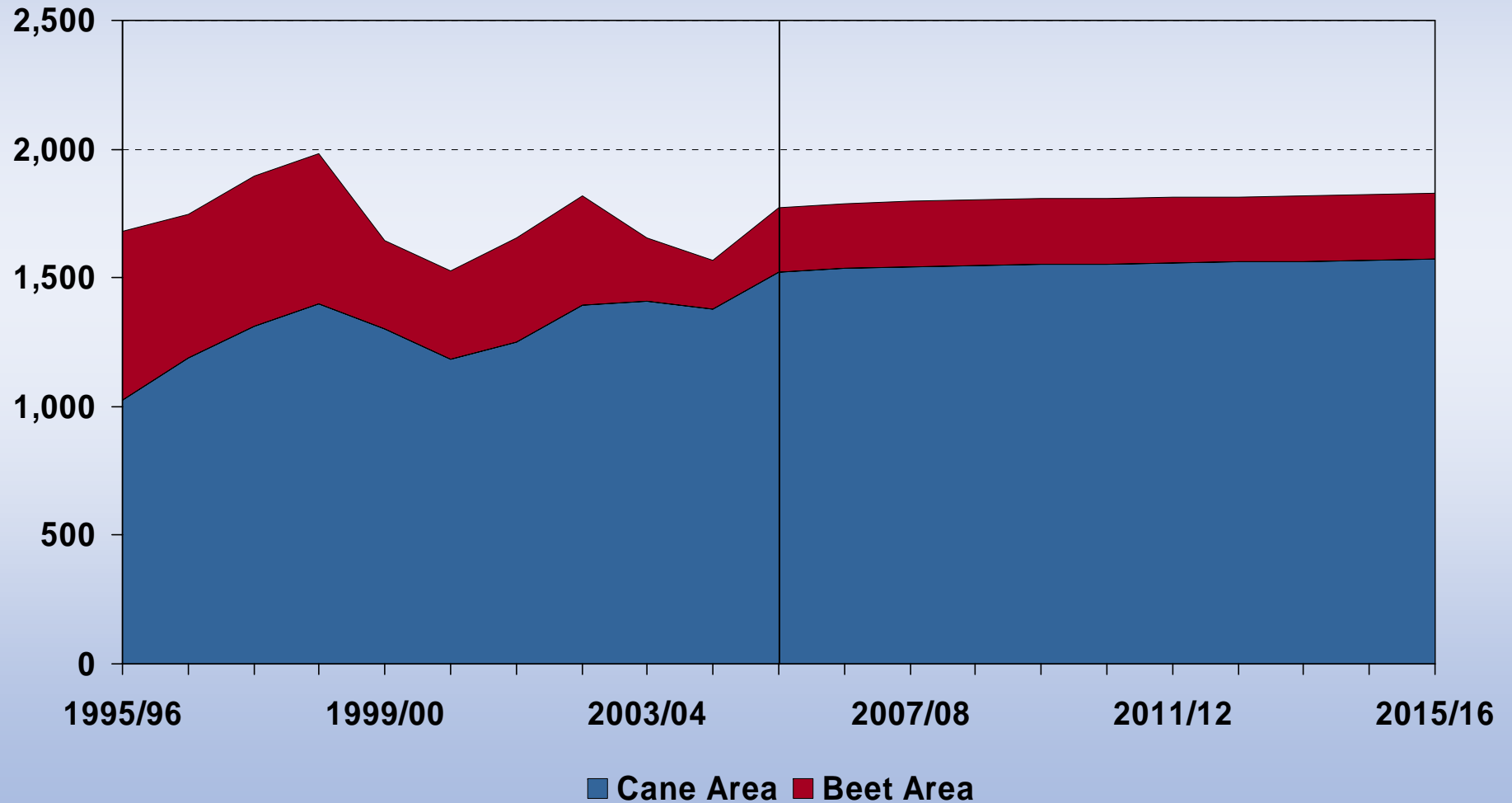


# Japanese Production, Consumption and Net Imports



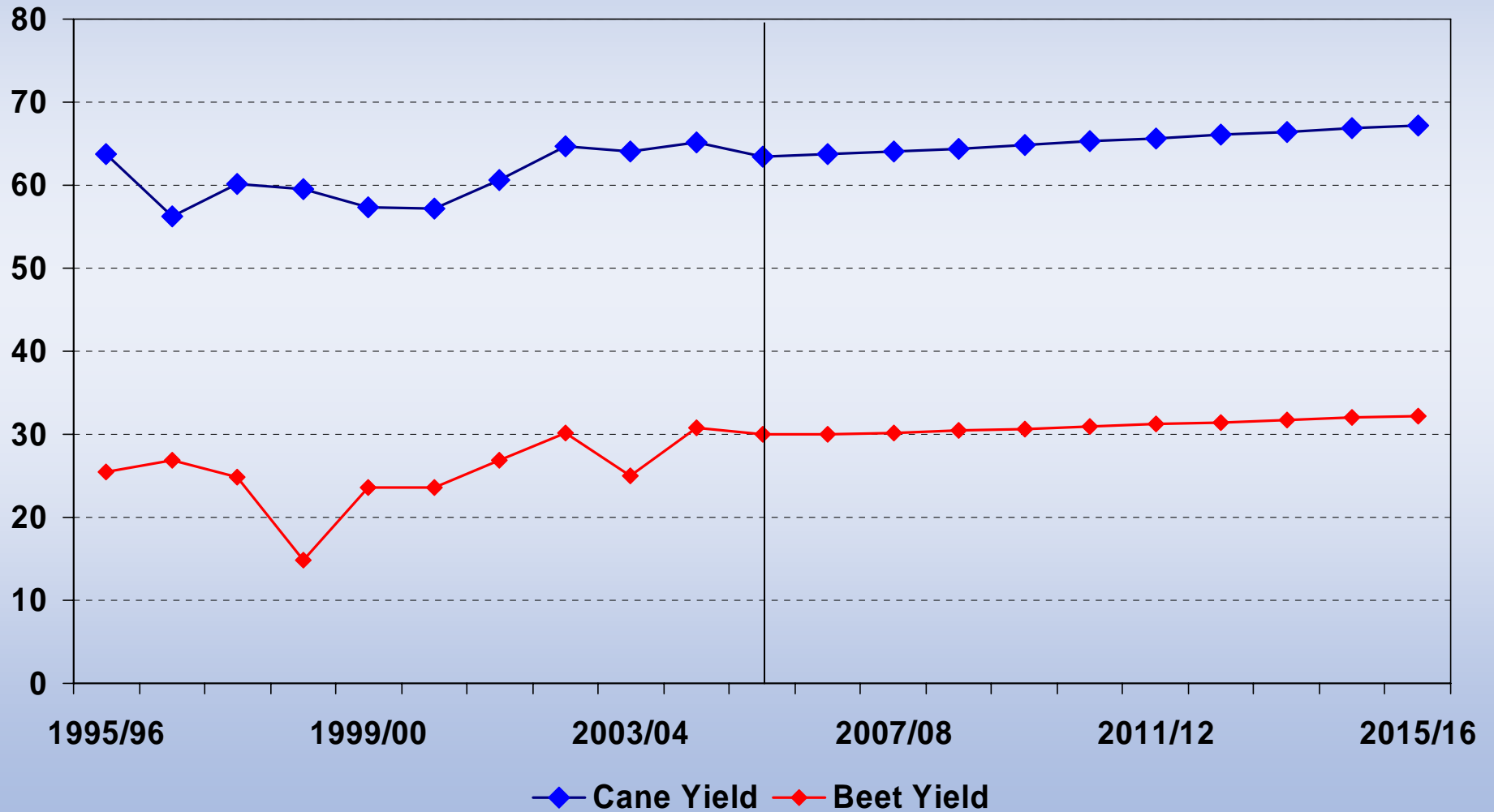
# Chinese Sugarcane and Sugar Beet Area Harvested

Thousand  
Hectares



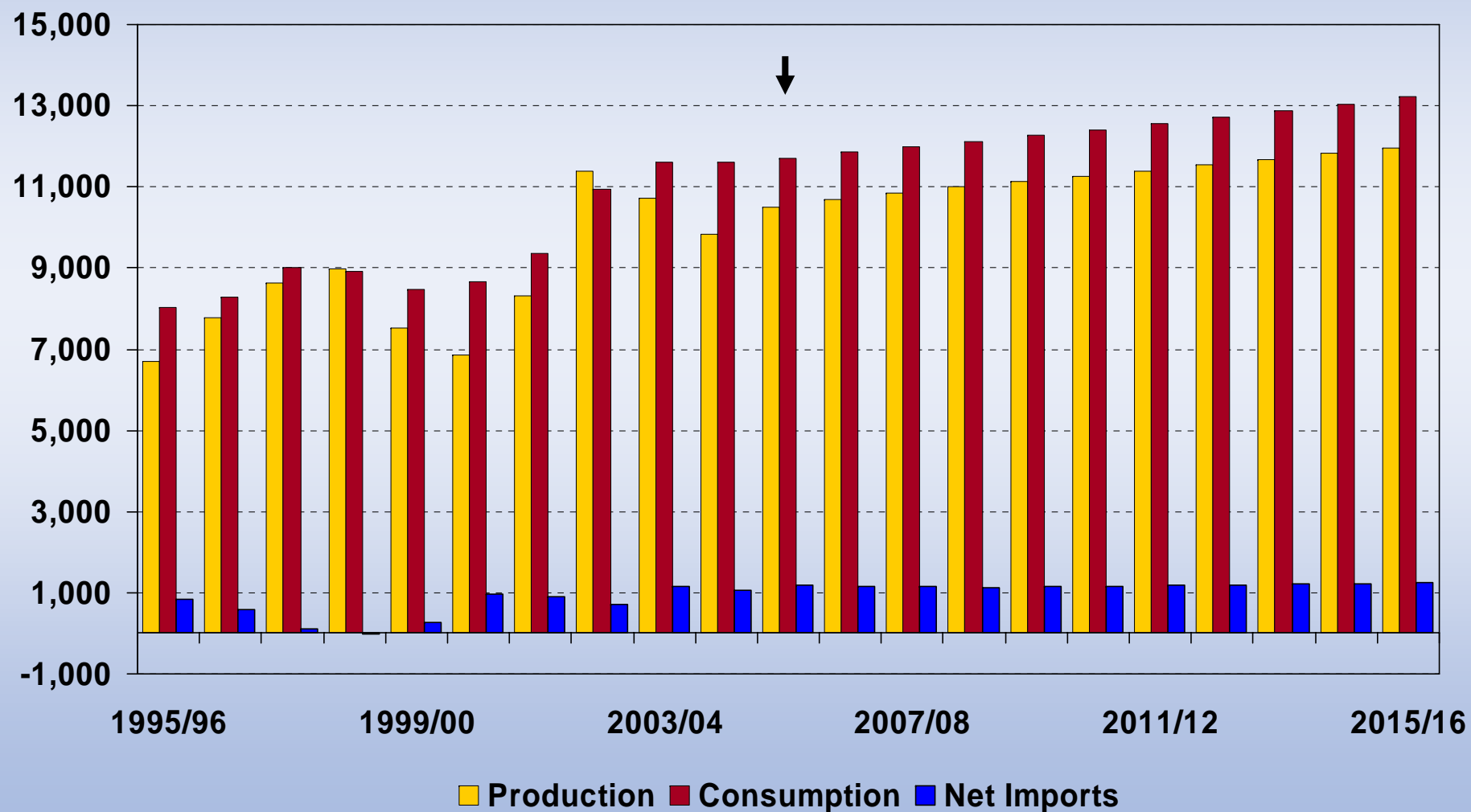
# Chinese Sugarcane and Sugar Beet Yield

MT per Hectare



# Chinese Production, Consumption and Net Imports

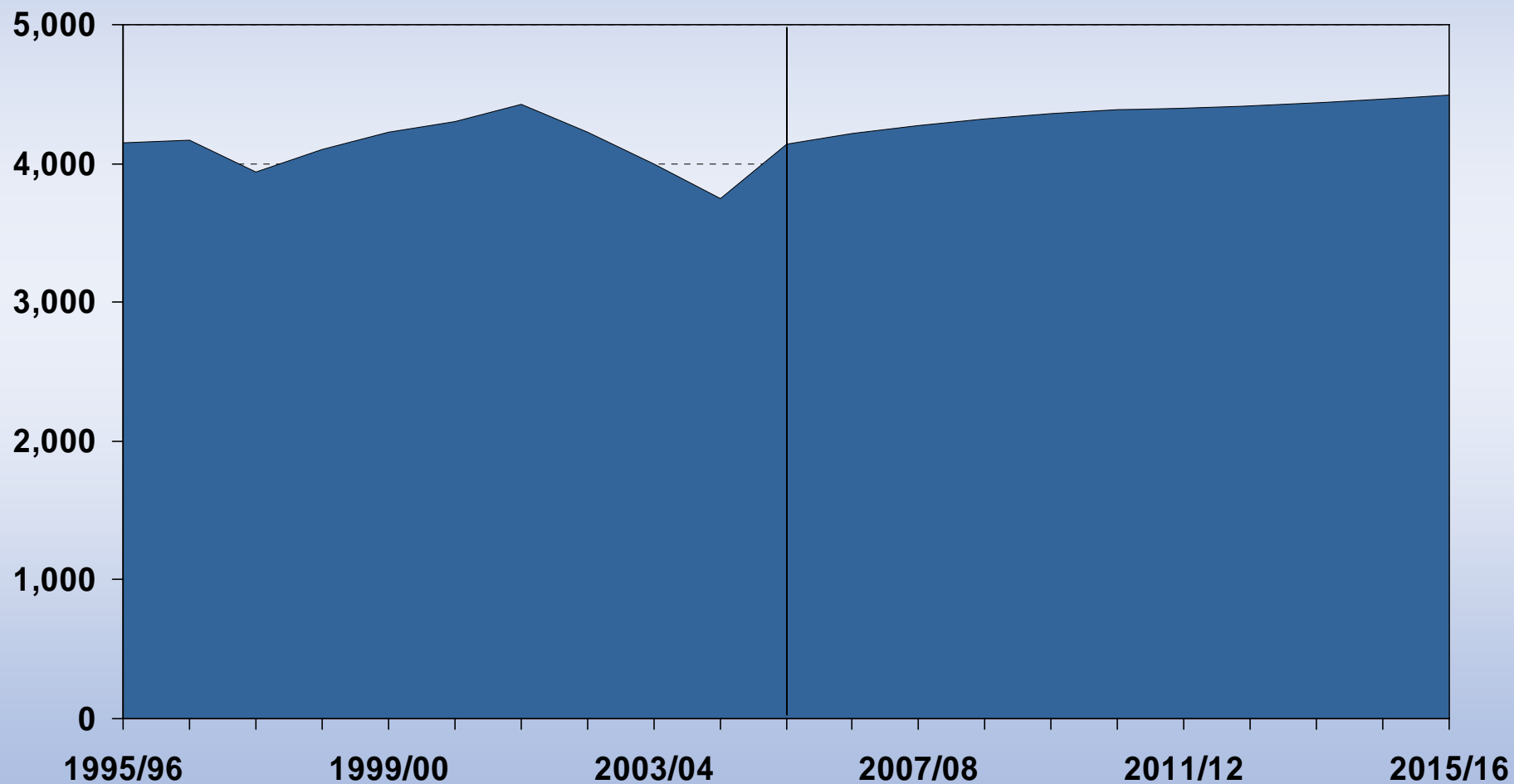
Thousand MT





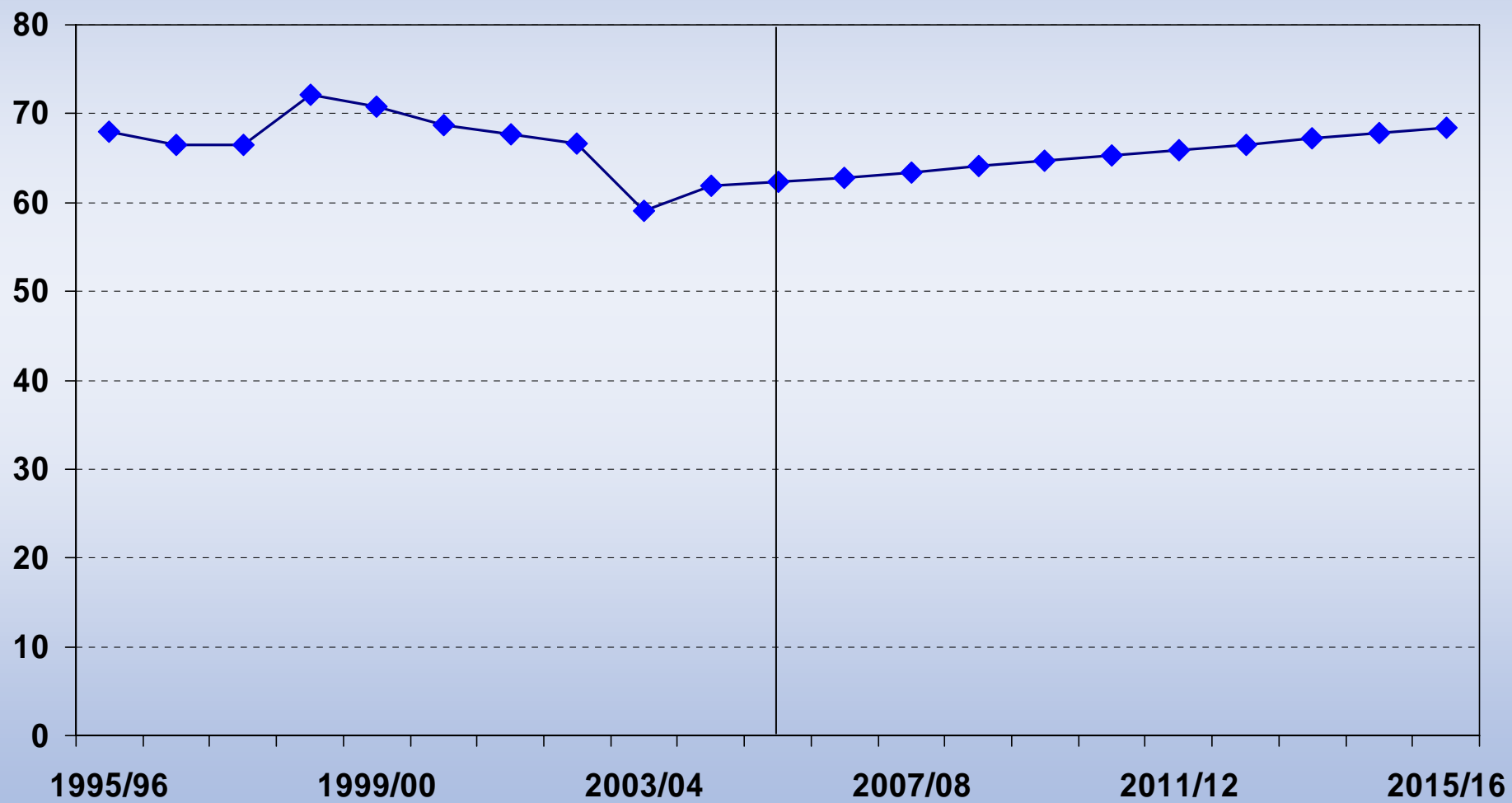
# Indian Sugarcane Area Harvested

Thousand Hectares



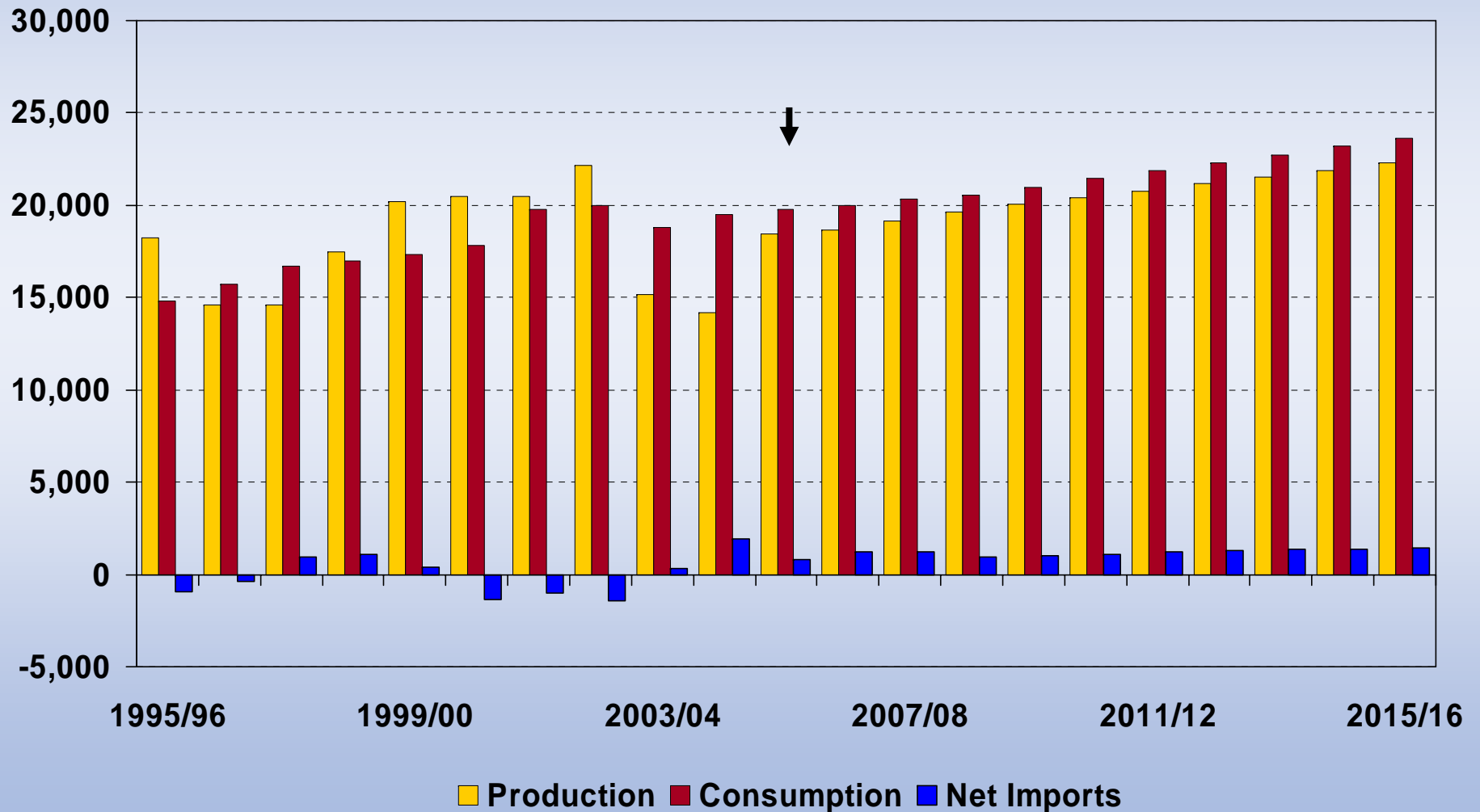
# Indian Yield

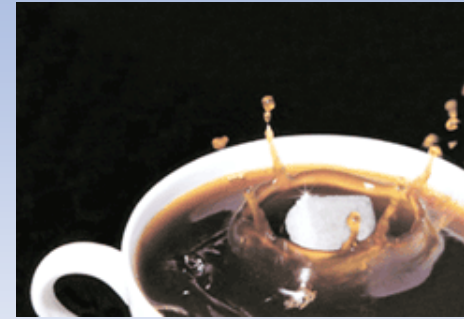
MT per Hectare



# Indian Production, Consumption and Net Imports

Thousand MT





*THANK YOU*

