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Post: Kyiv

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Report Highlights:

Marketing Year (MY) 2022/23 sugar production is forecast at 1.1 million metric tons (MMT), a 23 percent decrease compared to the previous MY estimate. Local sugar producers are constantly sandwiched between a gradually shrinking domestic market, which represents the lion's share of their consumers, and fluctuating world prices requiring accumulation of stocks. Armed conflict with Russia puts local sugar producers under even more strain in terms of ensuring production and exports.

Commodities:

Sugar Beets

Production:

According to data from the State Statistic Service of Ukraine (SSSU), 93 percent of the sugar beet production area is owned or operated by large agricultural enterprises. According to industry sources, these enterprises are large, vertically integrated agricultural businesses called agro-holdings, which also control sugar processing. This business model allows these agro-holdings to achieve economies of scale by controlling the full production chain starting from planting crops through producing and selling processed sugar, both to domestic and international markets. The remaining sugar beet production area is grown under contract with small and medium farmers, who supply raw material (sugar beets) to large processors that usually are part of large agricultural holding.

At the same time, smaller and mid-size farms that do not have in-house sugar production facilities and/or do not have a contract with a sugar processor, typically opt out of sugar beet production in favor of other crops that are more profitable, such as soybeans, sunflower seed and corn.

Sugar beet production offers negative profitability compared to other crops (please refer to the Profitability and Area Planted under Major Agricultural Crops in Ukraine table below for more details). Please note, for the purposes of this report, the term “profitability” means the ratio between revenues and variable costs for different crops reported by the SSSU and does not necessarily mean that a farmer constantly loses his/her money on this crop. Sugar beet farmers are dependent on the pricing policies of the sugar processing facilities in their region because the logistical costs for transporting sugar beets prevents shipments to competitive processors located in neighboring regions.

Profitability and Area Planted under Major Agricultural Crops in Ukraine
(thousand hectares, %, Calendar Years)

	1995	2000	2016	2017	2018	2019	2020	2021*
Grains & Pulses Area	14,152	13,646	14,349	14,602	14,839	15,318	14,759	15,944
Grains & Pulses Prof.	86%	65%	38%	25%	25%	12%	20%	-
Soybean Area	25	65	1,846	1,997	1,716	1,609	1,323	1,280
Soybean Prof.	-	-	52%	29%	21%	13%	30%	-
Sunflower Area	2,020	2,943	5,904	6,020	6,117	5,928	6,381	6,510
Sunflower Seed Prof.	171%	52%	63%	41%	33%	24%	39%	-
Rapeseed Area	49	214	456	788	1,042	1,282	1,105	1,010
Rapeseed Prof.	-	-	45%	44%	31%	9%	17%	-
Sugar Beets Area	1,475	856	292	316	276	222	202	227
Sugar Beets Prof.	31%	6%	24%	12%	-11%	-15%	-14%	-

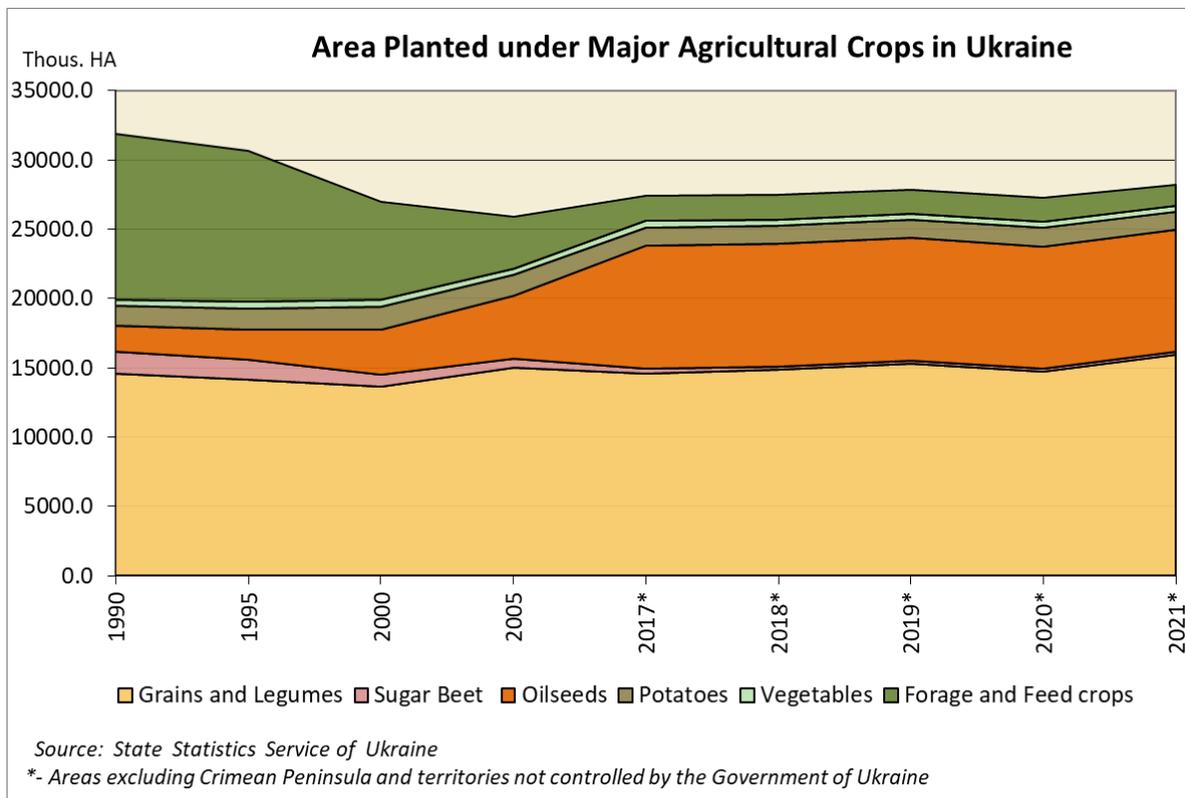
Source: State Statistics Service of Ukraine, (-) data not available, (*) - preliminary data

The Profitability and Area Planted under Major Agricultural Crops in Ukraine table, above, indicates that sugar beet growers are experiencing negative profitability for the third year in the row. The decreased production area in 2020 would seem to indicate that growers see no potential for this crop.

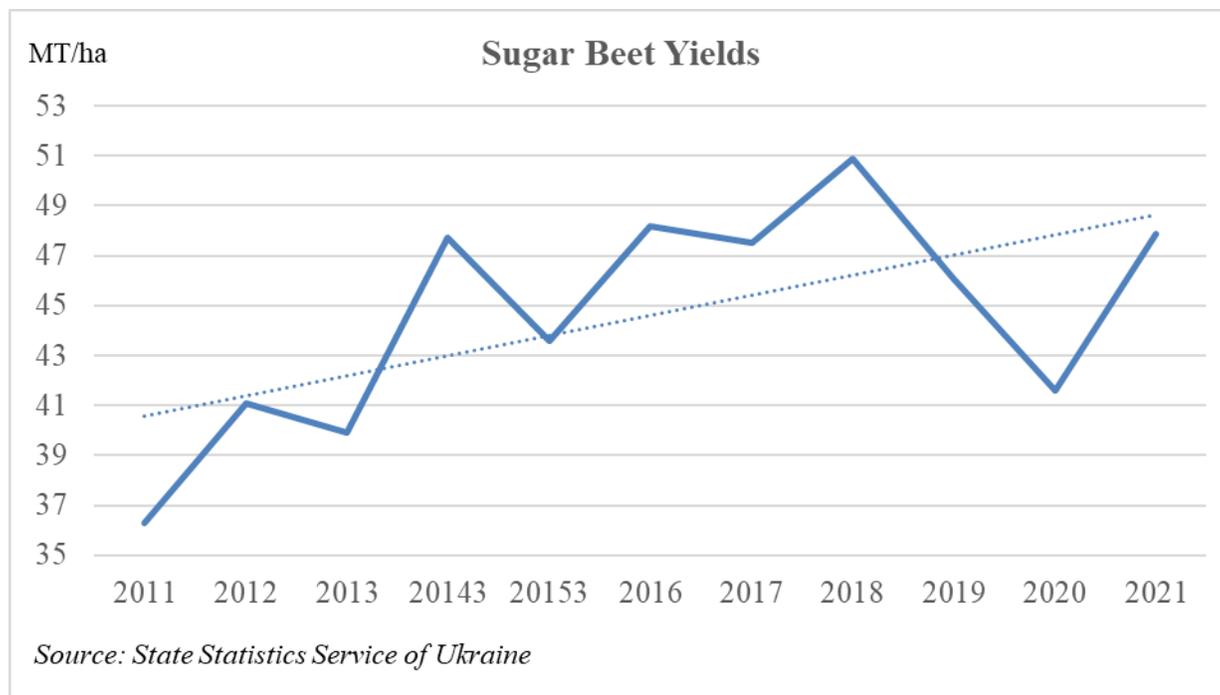
Based on this premise, Post believes profitability in 2021 was negative as well, however, official data has not yet been released. Negative profitability effectively facilitates continued exodus of small and medium farmers from sugar beet production, but not for the agro-holdings.

Large agro-holdings can use their own sugar processing plants and related businesses (e.g., confectionary) to redistribute economies of scale realized in their other divisions (production of grains, oilseeds, animal farms etc.) to offset the burden of unfavorable market conditions for sugar production. Moreover, the large agro-holdings have sufficient financial resources to modernize their processing facilities, as well as invest in higher-yield seeds, further cutting production costs. Agro-holdings are also able to increase their revenues by selling by-products from processing, including branching out into bioenergy (biogas) and construction of cogeneration facilities for production of electricity from biomass.

Poor economics of sugar beet production makes it a marginal crop compared to grains and oilseeds. Sugar beets comprise only a small share of Ukraine’s total production area (please refer to the Area Planted under Major Agricultural Crops in Ukraine graph below for more information).



Low profitability and a limited number of available processing plants (See Sugar Production Volumes vs Number of Plants graph below) puts a cap on the total area that could be allocated for sugar beet production. Under these circumstances, sugar beet producers are betting on efficiency, which implies maxing up their yields and farming smaller areas (see graph above). The downside of such approach materializes when the yield goes down due to the unfavorable weather conditions (as it happened in MY2020/21), the national volume of sugar beet production (and sugar) plummets as well.



According to the SSSU's data, MY2021/22 sugar beet harvested area was 267 thousand ha, a three percent increase compared to the previous marketing year. A combination of increased production area and higher yields for CY2021 resulted in MY2021/22 sugar beet production volume reaching over 10.8 MMT, a 31 percent increase from the previous MY.

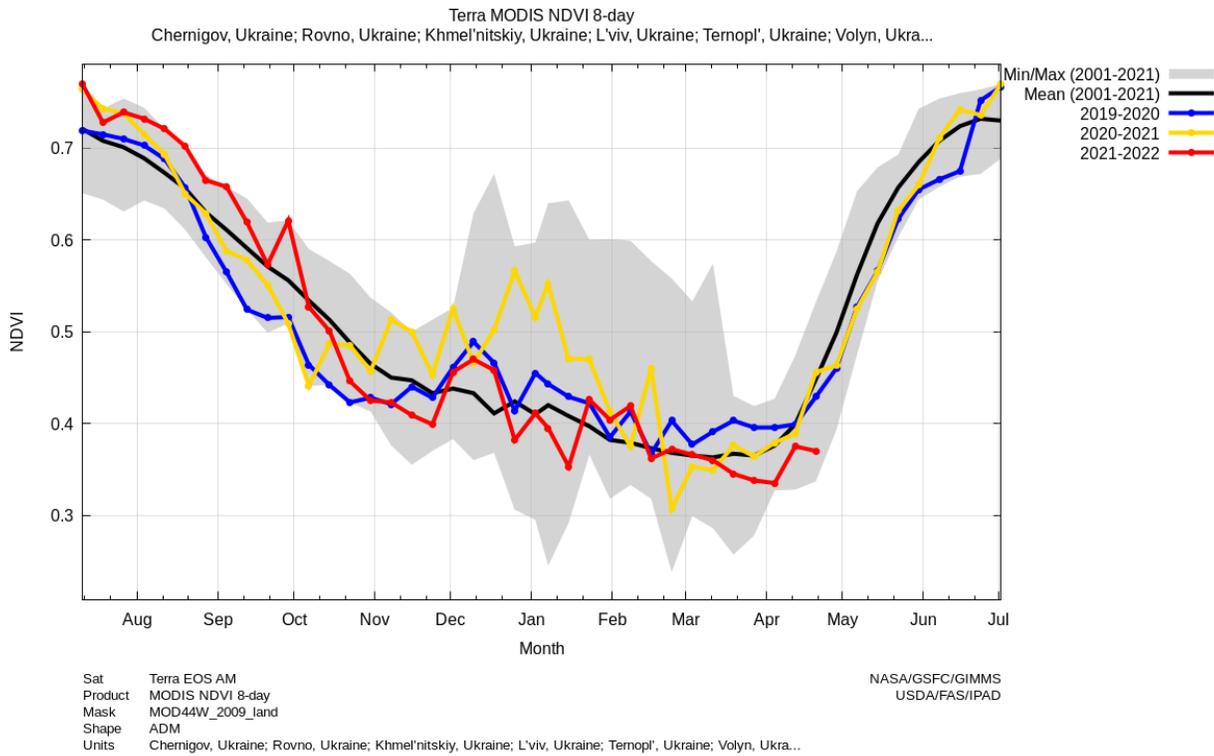
North and North-Western Ukraine (Vinnytsya, Volyn, Zhytomyr, Kyiv, Kirovohrad, Lviv, Poltava, Rivne, Ternopil, Kharkiv, Khmelnytskyi, Cherkasy and Chernihiv, regions) produce over 98 percent of the Ukrainian sugar beet production volume.

It should be noted that since February 23, 2022, Ukraine has been under a military invasion from Russia. The map below reflects the areas impacted by Russian troops while at its apex (end of March 2022) and at the time of the report writing. Post notes that production areas in nine regions may have been impacted by Russian aggression: Donetsk, Zaporizhzhya, Kyiv, Luhansk, Mikolayiv, Sumy, Kharkiv, Kherson, Chernihiv.

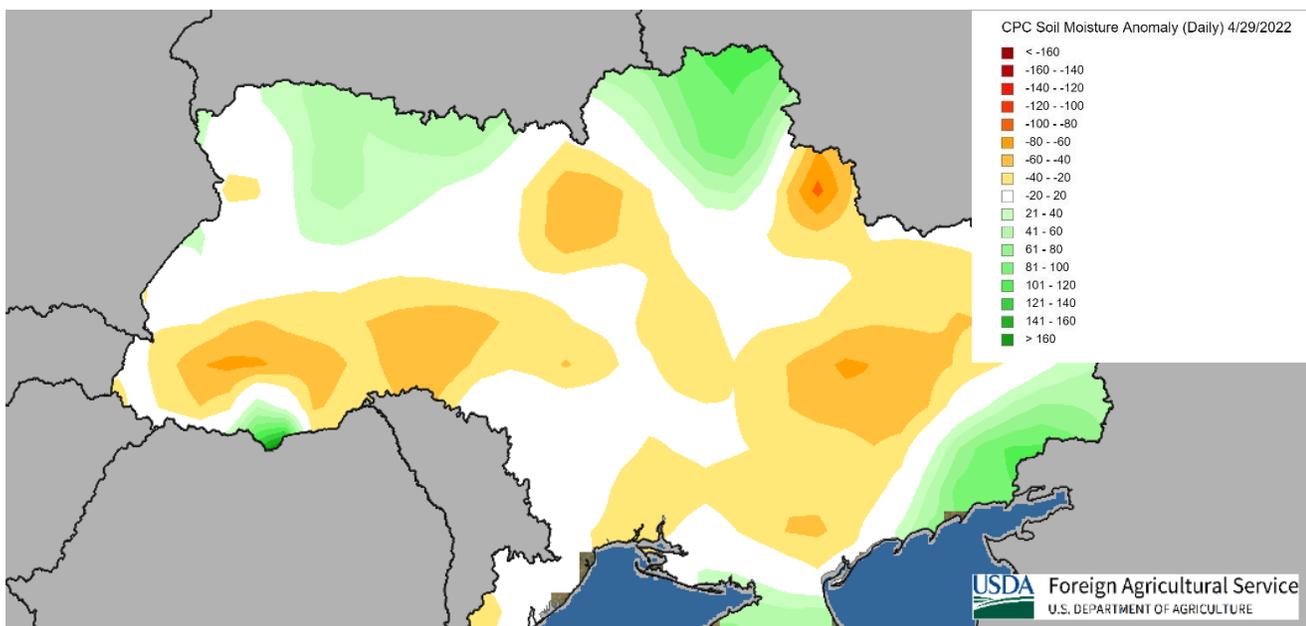


This means that at least some of the sugar beet production areas might not be good for planting for MY2022/23 due to the current or past military activities, including unexploded munitions, minefields etc. There are reported damages on farms that have prevented farmers from normal operations in the regions that have become battlegrounds.

Below is a graph that shows the Normalized Difference Vegetation Index (NDVI) for the abovementioned regions, a standardized measure of healthy vegetation. High NDVI values indicate healthier vegetation. Low NDVI values indicate low or no vegetation.



The NVDI graph for spring 2022 suggests sub-optimal growing conditions in growing regions before and during the period when sugar beets are being planted, thus the forecasted CY2022 yields would be very much dependent on soil moisture availability. Post tried to estimate the MY2022/23 yields based on CPC Soil Moisture Anomaly presented below.



Based on the abovementioned map Post assumes the 6-year average sugar beet yields across Ukraine with upward and downward yield adjustments based on moisture availability for individual regions at the time of the report writing.

FAS Kyiv forecasts MY2022/23 production area at 181 thousand ha, a 19 percent decrease compared to the previous MY. The forecasted decrease of production area will predominantly be the result of the Russian military invasion in Ukraine, as sugar beet growers (especially small and medium farmers) might be unsure about ability of processing facilities to purchase their crop.

Based on the abovementioned area and yield assumptions, FAS Kyiv forecasts the MY2022/23 sugar beet production volume at 8.4 MMT, a 23 percent decrease compared to MY2021/22 production estimate (10.8 MMT).

Consumption:

Sugar beets are not used in Ukraine for alcohol production. Rather, they are fully utilized for sugar production. This information is reflected in the Production, Supply and Distribution Data (PSD) table below.

Trade:

Ukraine has not imported or exported any sugar beets or sugar cane during the last three years.

Production, Supply and Distribution Data:

Post's MY2021/22 estimated harvested area is four percent higher than the official USDA data, based on the available SSSU data.

Post's MY2021/22 estimated production volume is six percent higher than official USDA data, based on available SSSU data.

Post's MY2021/22 estimated utilization for sugar volume is six percent higher than official USDA data, based on MY2021/22 production estimate.

Sugar Beets Market Year Begins Ukraine	2020/2021		2021/2022		2022/2023	
	Sep 2021		Sep 2022		Sep 2023	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	210	210	220	227	0	183
Area Harvested (1000 HA)	202	202	218	227	0	181
Production (1000 MT)	8257	8257	10187	10854	0	8379
Total Supply (1000 MT)	8257	8257	10187	10854	0	8379
Utilization for Sugar (1000 MT)	8257	8257	10187	10854	0	8379
Utilizatn for Alcohol (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	8257	8257	10187	10854	0	8379
(1000 HA) ,(1000 MT)						

Commodities:

Sugar, Centrifugal

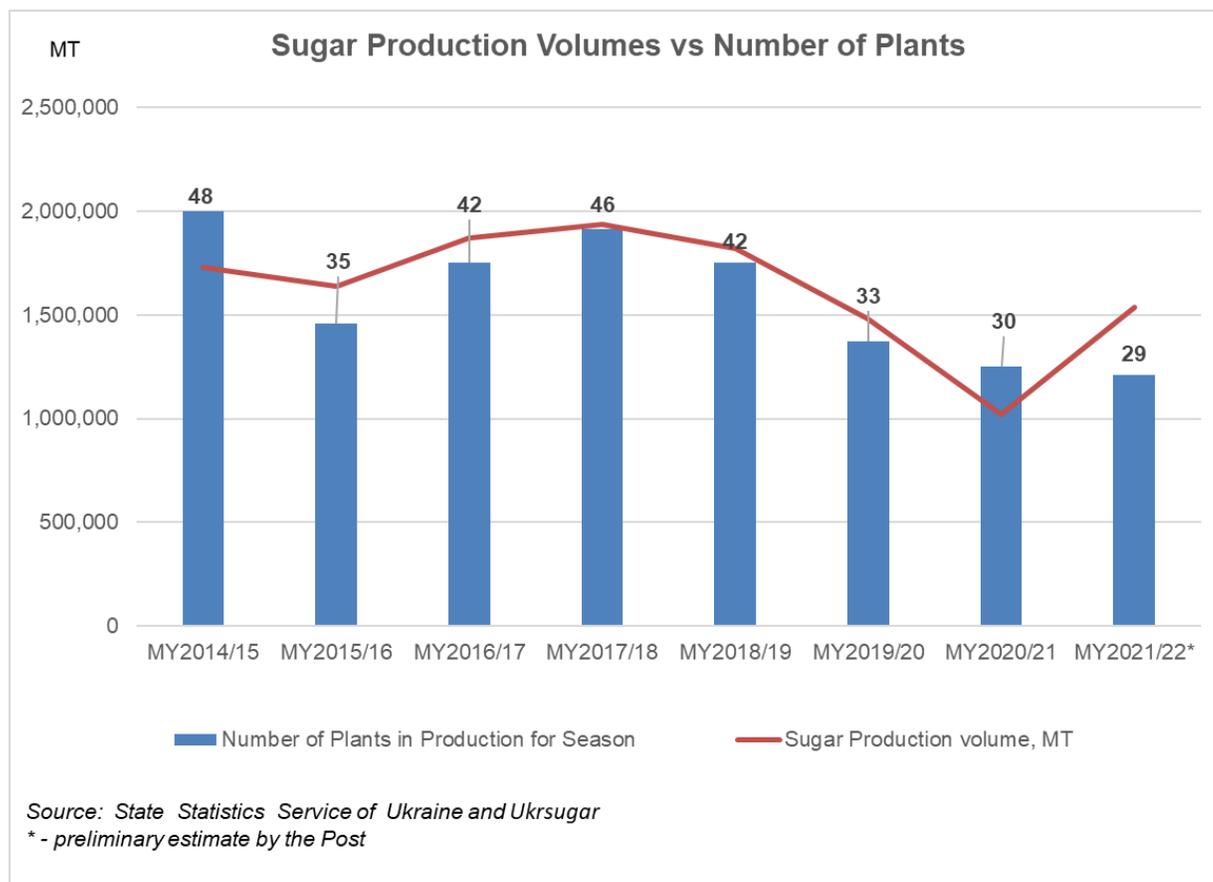
Production:

The Ukrainian National Association of Sugar Producers, "UkrSugar," reported sugar production at 1.2 MMT for CY2021 (September-December 2021) a 23 percent increase compared to the previous CY.

FAS Kyiv's initial estimate for MY 2021/22 sugar production is 1.4 MMT, a 13 percent increase compared to the previous MY. This estimate is based on SSSU's production data for October-December 2021 and Post's own estimates for September 2022 based on estimated sugar beet production for CY2022. *Please note that FAS's estimates are done in raw value basis by multiplying refined sugar volume by 1.087 (see PSD tables for more details).*

MY2022/23 sugar production is forecast at 1.1 MMT, a 23 percent decrease compared to the MY2021/22 estimate, based on the forecast sugar beet production volume discussed in the relevant section above.

Competitive international markets, as well as the varying availability of sugar beets, requires sugar processors to vary which processing facilities are operational at any given time. See Sugar Production Volumes vs Number of Plants graph below demonstrating the correlation between sugar production volume and the number of operating facilities.



Facility owners use a variety of methods to remain competitive, keeping production costs down and revenues up. In the production process they replace natural gas with biogas that is derived from sugar production waste in their factories. They also sell pelleted beet pulp in both domestic and international markets. Most producers have attempted to increase revenues by switching production to top-quality sugar to obtain a better price.

Shrinking production areas of sugar beets may be forcing some of the processors out of business. In 2021 UkrSugar ([in Ukrainian](#)) reported that, on one hand one of the sugar plants has been announced for sale and on the other, a market participant was fined for attempted acquisition of its competitor allegedly due to improper compliance to antimonopoly regulations.

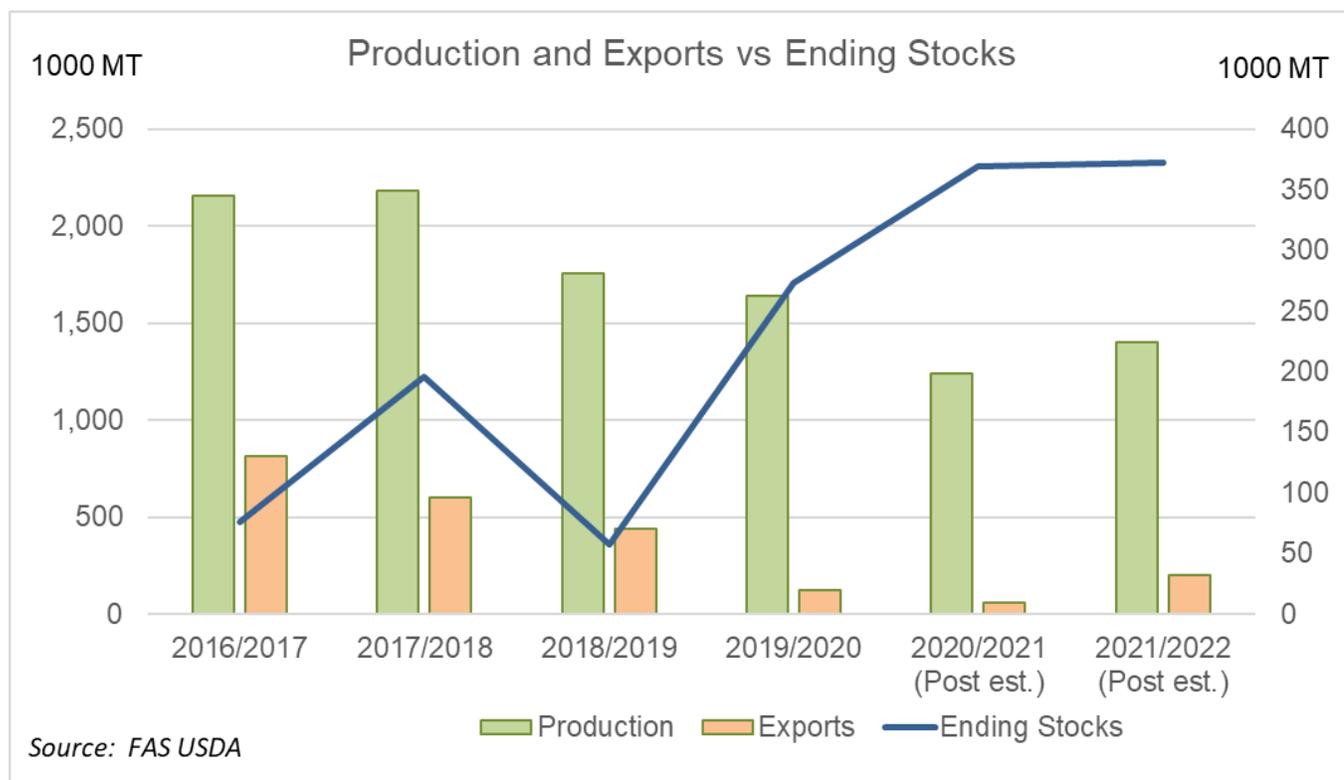
According to UkrSugar, large sugar producers switched to production of high-quality sugar (local I-category). Part of the efforts to ensure product quality was tied to Ukraine’s harmonization of the national sugar quality standards with those of the EU (please refer to the Policy section of this report for more details).

Stocks:

According to Post's estimates, MY2020/21 ending stocks were 1.3-fold higher compared to the previous marketing year (please refer to Production and Exports vs Ending Stocks graph below). This resulted from the combination of two factors:

- low volumes of sugar beet production forced processors to resort to raw sugar imports to keep their facilities running.
- Ukraine started importing processed sugar in response to hiking domestic prices (Domestic Refined Sugar Prices in Ukraine graph in the Consumption section below), which added up to accumulation the stocks.

MY2021/22 ending stocks estimated to be similar to the previous MY as increased production has been offset by higher exports (see Trade section for more details).



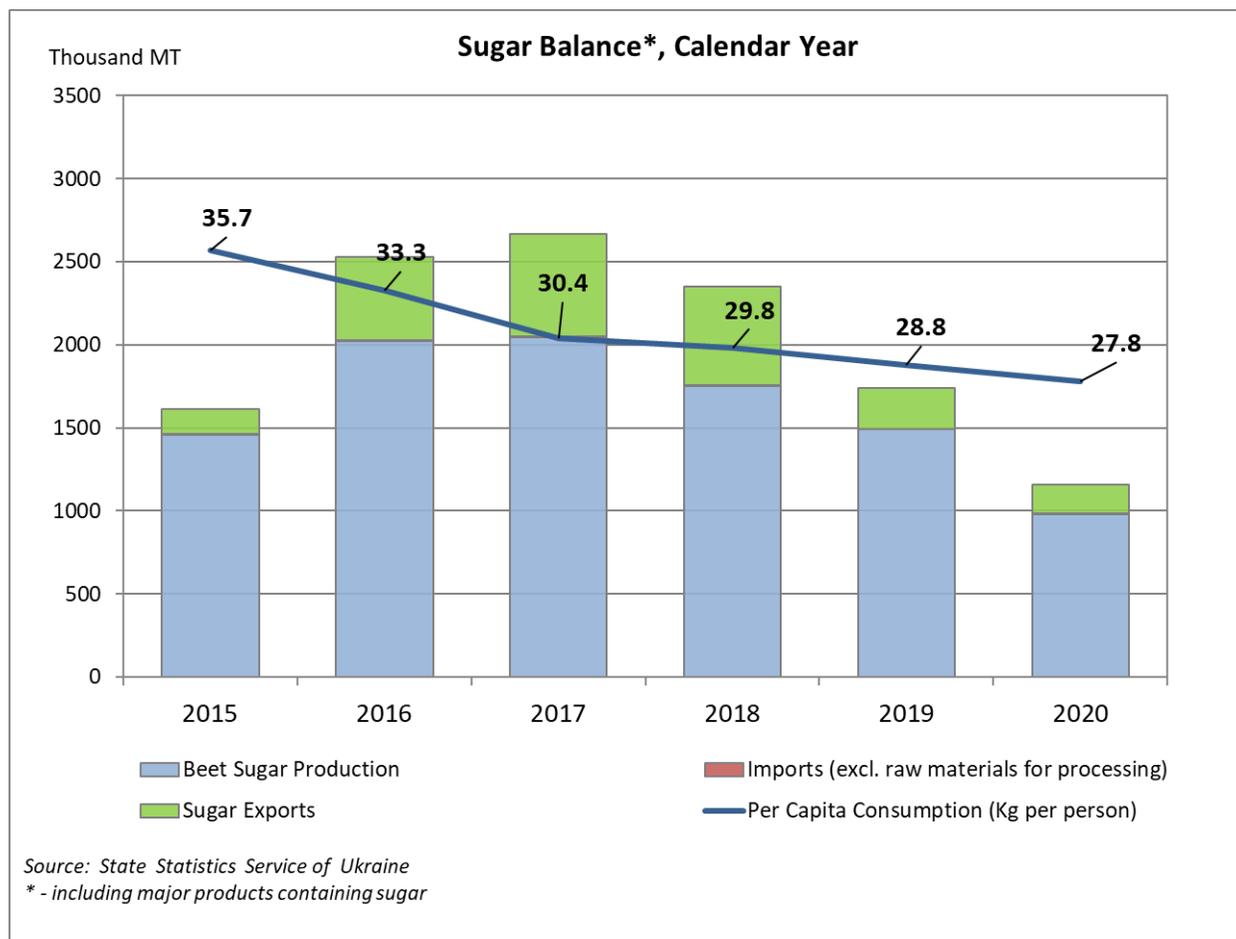
Sugar stocks are predominantly held by sugar producers and wholesalers.

Consumption:

Refined sugar consumption in Ukraine has been slowly decreasing due to a declining population as well as food processors' ability to substitute sugar with high-intensity sweeteners (please refer to Trade section for more details). Ukrainian consumers' consumption of condensed milk with sugar is declining

as well. Likewise, fewer consumers are making homemade jams out of fresh fruits. These two products – condensed milk with sugar and homemade jams - were two of the traditional pillars of sugar intake in Ukraine.

This trend of decreasing domestic sugar consumption has been confirmed by SSSU data, which indicates that per capita sugar consumption in Ukraine is gradually decreasing (please refer to Sugar Balance graph below).

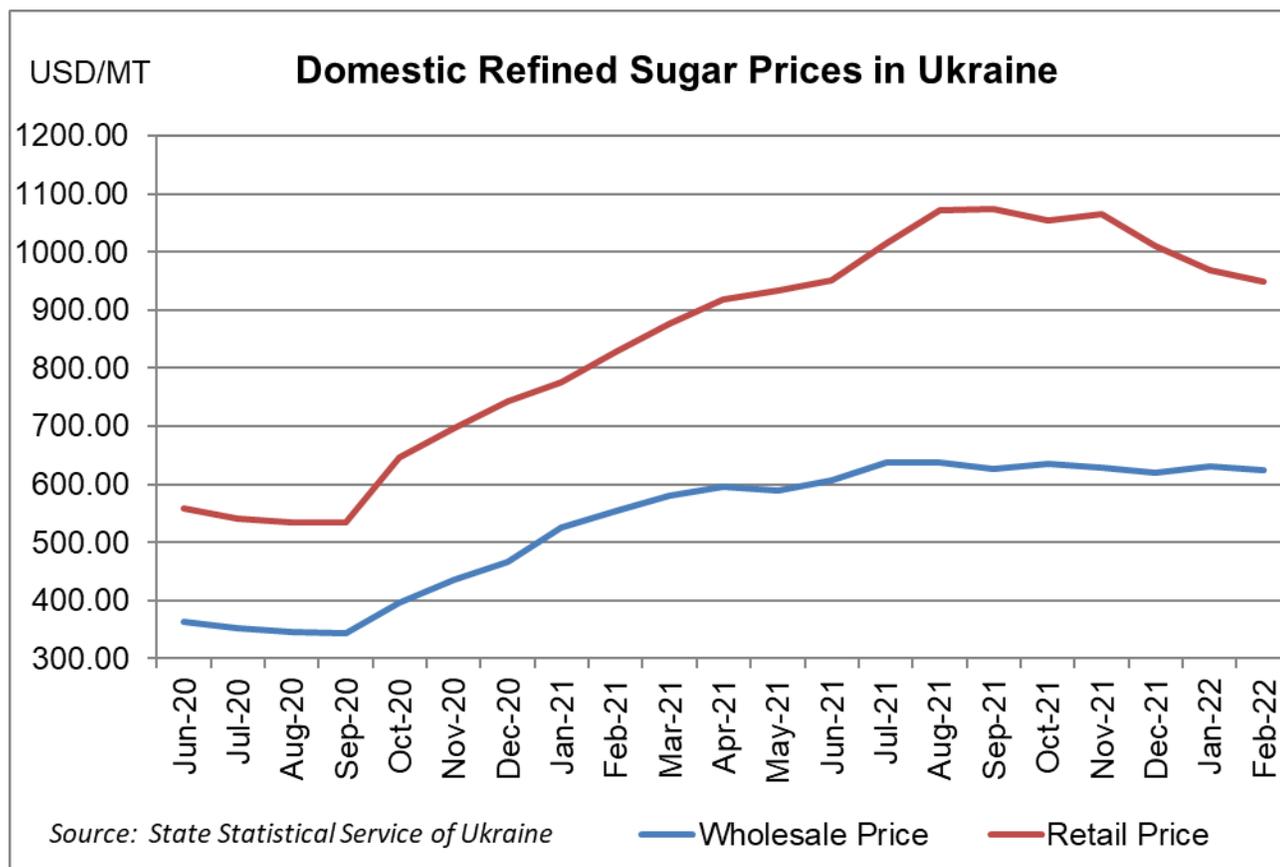


The major products that utilize sugar include sweetened condensed milk, jams, bakery, and confectionary products. According to SSSU’s data, production volumes for all these products (except for bakery) decreased during 2021. At the same time, Ukrainian imports of high-intensity sweeteners (in sugar equivalent) for MY2020/21 increased by around 30 percent in Post-estimated sugar equivalent compared to the previous MY (please refer to Trade Section for more details). These imports create the additional downward pressure towards already decreasing domestic sugar consumption in Ukraine. Based on these facts, Post has decreased MY2020/21 sugar food consumption in Ukraine by four percent compared to the previous MY.

The armed conflict with Russia is the major driver for decreased domestic consumption of sugar due the stream of Ukrainian refugees that have already left the country in CY 2022. According to [UNHCR’s](#)

[data](#) over 5.6 million of Ukrainians, which is around 13 percent of the pre-war population, fled the country. Post decreased sugar food consumption by seven percent for MY2021/22 compared to the previous MY. Post's MY2022/23 estimate for domestic consumption of sugar is four percent higher compared to MY2021/22, based on the assumption that 80 percent of refugees that left Ukraine will return.

In MY2021/22 and early MY2022/23, the wholesale price for domestic refined sugar (please refer to the Domestic Refined Sugar Prices in Ukraine graph, below, for more details) was going up. Scares of product shortage were fueling the spread between retail and wholesale prices. This spread begins to narrow as soon as the market become saturated both in terms of domestic production and imports.



Given the ongoing war, Post has increased other disappearances for MY2021/22 in the relevant PSD to 150 thousand MT. The reduction reflects the estimated destruction of stocks (warehouses, retail shops etc.) in the regions where the military activities are taking place as well as Russian forces' deliberate attempts to target civilian infrastructure in the rest of Ukrainian territory.

Trade:

Ukraine is a net exporter of refined beet sugar. Exports predominantly serve as a vehicle for removing excess sugar production from the domestic market, thereby preventing an accumulation of stocks (please refer to Stocks Section for more details).

MY2020/21 was the first year when Ukraine reported substantial volumes of sugar imports: 40 thousand metric tons (TMT) for refined sugar and 123 TMT for raw one due to the drop of domestic sugar beet production. MY2020/21 refined sugar exports reached 55 TMT. The major destinations were the EU, Uzbekistan, Armenia, Azerbaijan and Tajikistan.

Post does not expect any substantial sugar imports for MY2021/22 given the high ending stocks, as well as military conflict with Russia decreasing levels of domestic sugar consumption – see the relevant sections above.

Given the excess of sugar on the domestic market, Ukraine will seek to maximize its exports for MY2021/22. Due to the military invasion by Russia, Russian armed forces are targeting Ukrainian transport infrastructure as well as blocking access to all ports both on Black Sea and Sea of Azov (some of ports are now blocked by Russian navy and some destroyed or captured by Russian ground forces).

In CY2022 Ukrainian exporters lost their ability to directly ship eastwards, including to their largest consumers in Uzbekistan, Tajikistan, Armenia and Azerbaijan. The only remaining export route for them is westward, which includes Moldova and the EU. The EU might serve both as a final destination and further transshipment point to other markets through the ports of Romania, Bulgaria, Poland, Germany, Netherlands, Italy and Spain.

Ukraine's exports of refined sugar in the first three months of MY2021/22 reached 23 TMT, a 56 percent decrease compared to the previous marketing year. The London Sugar price (graph below for more details) indicates that sugar prices were on the rise since the beginning of MY2021/22. Post estimates that Ukraine would maximize its sugar exports up to 200 TMT for MY2021/22, a 3.3 fold increase compared to MY2020/21. This estimate is based on the assumption that increased transportation/transshipment costs could be compensated by higher prices and also the fact that export limitations have been dropped by the Government of Ukraine (see Policy section).



Source: markets.ft.com

Due to Ukraine’s developed processing industry as well consumer preferences towards healthy foods, the total volume of imports of high-intensity sweeteners (such as aspartame, sucralose, saccharin, monk fruit, stevia, acesulfame, neotame and cyclamates) was 31 TMT for MY2020/21 (please refer to High-Intensity Sweeteners Table below for more details), an 81 percent increase compared to the previous MY. According to FAS Kyiv estimates, based on FDA’s Multiplier of Sweetness Intensity, the amount of sweeteners imported is equivalent to between 530 and 560 TMT of beet sugar for MY2020/21. This puts an additional cap on the ability of national sugar producers to sell sugar in the domestic market, thus forcing them to export more.

Imports of High-Intensity Sweeteners to Ukraine

HS Code	Description	Unit	Quantity			% Change MY 2020/21 to MY2019/20
			MY 2018/19 (Oct 18-Sept 19)	MY 2019/20 (Oct 19-Sept 20)	MY 2020/21 (Oct 20-Sept 21)	
130219	Vegetable Saps And Extracts, Nesoi	MT	101	96	104	108.33
		Mln. USD	5.31	4.63	5.56	120.10
1702	Sugars Nesoi, Incl Chem Pure Lactose Etc; Caramel	MT	15,048	15,688	28,976	184.70
		Mln. USD	12.64	13.38	17.87	133.54
292429	Cyclic Amides, Derivatives And Salts Of, Nesoi	MT	1,109	953	1,635	171.56
		Mln. USD	13.23	11.37	15.78	138.75
292511	Saccharin And Its Salts	MT	23	59	27	45.76
		Mln. USD	0.19	0.44	0.24	55.66
292990	Compounds Nesoi With Nitrogen Function Nesoi	MT	100	75	53	70.67
		Mln. USD	0.72	0.27	0.49	181.15
293219	Cmpds Cont An Unfused Furan Ring Etc Nesoi	MT	41	24	0	0.00
		Mln. USD	1.68	0.91	0.00	0.00
293499	Nucleic Acids & Salts; Other Heterocyclic Cmp, Nes	MT	308	265	294	110.94
		Mln. USD	24.30	26.31	33.47	127.21
294200	Organic Compounds Nesoi	MT	5	8	8	100.00
		Mln. USD	0.24	0.68	0.13	19.28
Total Estimated Sugar Equivalent for Imported Sweeteners*		MT	432,548	421,088	547,376	129.99

Source: Trade Data Monitor, LLC; *- estimate based on the FDA's data (reference only)

Production, Supply and Distribution Data Statistics:

It should be noted that in the PSD table below all refined beet sugar numbers have been converted to raw value basis by multiplying them by 1.087.

Post's MY2020/21 beet sugar production estimate is nine percent higher than the official USDA estimate based on SSSU's data.

Post's MY2020/21 raw import estimate is 123 TMT higher than USDA's official estimate based on available trade data.

Post's MY2020/21 and MY2021/22 refined import estimates are 22 fold higher and 50 percent lower, respectively, than USDA's official estimates based on available trade data.

Post's MY2020/21 refined export estimate is 37 percent lower than USDA's official estimate based on available trade data.

Post's MY2021/22 refined export estimate is 29 percent higher than USDA's official estimate based on consumption and export estimates discussed in the relevant sections above.

Post's MY2021/22 human domestic consumption estimate is seven percent lower than the official USDA estimate, based on arguments discussed in the Consumption section of this report.

Post's MY2021/22 other disappearance estimate is 3 fold higher than the official USDA estimate, based on factors discussed in the Consumption section of this report.

Post's MY2020/21 and MY2021/22 ending stocks estimates are 5.8 fold and 5.3 fold higher, respectively, than the official USDA estimates, based on arguments discussed in the Stocks section of this report.

Sugar, Centrifugal Market Year Begins	2020/2021		2021/2022		2022/2023	
	Oct 2020		Oct 2021		Oct 2022	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Ukraine						
Beginning Stocks (1000 MT)	273	273	64	369	0	318
Beet Sugar Production (1000 MT)	1134	1240	1399	1415	0	1092
Cane Sugar Production (1000 MT)	0	0	0	0	0	0
Total Sugar Production (1000 MT)	1134	1240	1399	1415	0	1092
Raw Imports (1000 MT)	0	123	0	0	0	0
Refined Imp.(Raw Val) (1000 MT)	2	44	2	1	0	50
Total Imports (1000 MT)	2	167	2	1	0	50
Total Supply (1000 MT)	1409	1680	1465	1785	0	1460
Raw Exports (1000 MT)	0	1	0	0	0	0
Refined Exp.(Raw Val) (1000 MT)	95	60	155	200	0	100
Total Exports (1000 MT)	95	61	155	200	0	100
Human Dom. Consumption (1000 MT)	1200	1200	1200	1117	0	1166
Other Disappearance (1000 MT)	50	50	50	150	0	85
Total Use (1000 MT)	1250	1250	1250	1267	0	1251
Ending Stocks (1000 MT)	64	369	60	318	0	109
Total Distribution (1000 MT)	1409	1680	1465	1785	0	1460
(1000 MT)						

Policy:

In 2018, Ukraine abolished both the minimal price boundary that had been mandated in legislation and the quota regime for domestic sugar production. For more information, please refer to our [GAIN Report UP1827](#) for more details.

Ukraine maintains a 50 percent import duty for all imported sugar both raw and processed (HS Code 1701 and all its subcodes). As a result of WTO accession negotiations, Ukraine introduced a 260 TMT annual tariff quota on imports of raw sugar cane (HS Code 170111) originating from WTO Member States. The quota is allocated among applicants based on a “first come – first serve”. The import quotas are based on import licenses distributed by the Ministry of Economy of Ukraine (MOE). According to the MOE’s notification ([in Ukrainian](#)) CY2022 quota for raw cane sugar was set at 267.8 TMT.

Ukraine plans to harmonize its quality requirements for sugar intended for human consumption ([in Ukrainian](#)) with the EU standards stated in the Council Directive [2001/111/EC](#). The relevant amendments to Ukrainian legislation are scheduled to come into force on September 1, 2022.

The Law #1115 “On Amendments to the Tax Code of Ukraine Concerning the Value Added Tax Rate on Transactions for the Supply of Certain Types of Agricultural Products,” hereinafter, Law #1115 ([in Ukrainian](#)), was signed on February 22, 2021. Law #1115 decreases the VAT rate to 14 percent from the previous rate of 20 percent for several commodities intended for processing, including sugar beets. One may consider that sugar processors have been beneficiaries of Law #1115, because farm-gate prices for sugar beets will be 6 percent lower for processors.

In early May 2022, the Government of Ukraine abolished ([in Ukrainian](#)) the de-facto export ban for sugar that was established in the wake of Russian invasion in form of zero-volume export quotas for a number of agricultural commodities.

**Author Defined:
Trade Data**

Refined Sugar Exports from Ukraine by Destination, MY, MT (HS 170191, 170199)

Origin	MY 2018/19 (Oct 18-Sept 19)		MY 2019/20 (Oct 19-Sept 20)		MY 2020/21 (Oct 20-Sept 21)		% Change MY 2020/21 to MY 2019/20
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	402,942.0	100.0	114,881.0	100.0	55,171.0	100.0	-52.0
EU 27 Brexit	52,518.0	13.0	20,353.0	17.7	9,676.0	17.5	-52.5
Eurasian Economic Union	45,695.0	11.3	8,417.0	7.3	7,000.0	12.7	-16.8
Middle East	30,202.0	7.5	45,923.0	40.0	6,081.0	11.0	-86.8
South Asia	0.0	0.0	1,714.0	1.5	742.0	1.4	-56.7
East and Southeast Asia	371.0	0.1	273.0	0.2	92.0	0.2	-66.2
Africa	19,525.0	4.9	8,546.0	7.4	1.0	0.0	-100.0
Uzbekistan	91,967.0	22.8	4,916.0	4.3	13,042.0	23.6	165.3
Tajikistan	33,967.0	8.4	3,646.0	3.2	8,176.0	14.8	124.3
Armenia	10,248.0	2.5	3,219.0	2.8	6,928.0	12.6	115.2
Azerbaijan	73,149.0	18.2	224.0	0.2	6,903.0	12.5	∞
Spain	8,989.0	2.2	0.0	0.0	5,658.0	10.3	0.0
Israel	13,929.0	3.5	3,204.0	2.8	3,480.0	6.3	8.6
Moldova	11,626.0	2.9	7,037.0	6.1	3,033.0	5.5	-56.9
Romania	21,008.0	5.2	10,591.0	9.2	2,990.0	5.4	-71.8
Gaza Strip and West Bank	1,560.0	0.4	8,684.0	7.6	1,300.0	2.4	-85.0
Turkey	8,966.0	2.2	24,987.0	21.8	780.0	1.4	-96.9
Afghanistan	0.0	0.0	1,688.0	1.5	742.0	1.4	-56.0
Cyprus	676.0	0.2	1,249.0	1.1	573.0	1.0	-54.1
Lebanon	0.0	0.0	8,580.0	7.5	520.0	0.9	-93.9
Germany	310.0	0.1	500.0	0.4	451.0	0.8	-9.9
Montenegro	827.0	0.2	91.0	0.1	369.0	0.7	305.9
South Korea	266.0	0.1	169.0	0.2	92.0	0.2	-45.5
Belarus	1,811.0	0.5	178.0	0.2	53.0	0.1	-69.9
Georgia	13,889.0	3.5	5,216.0	4.5	46.0	0.1	-99.1
Russia	10,493.0	2.6	4,973.0	4.3	18.0	0.0	-99.6
United States	24.0	0.0	13.0	0.0	4.0	0.0	-68.4
Marshall Islands	1.0	0.0	1.0	0.0	1.0	0.0	-35.2
Liberia	2.0	0.0	1.0	0.0	1.0	0.0	-49.2
United Kingdom	17,631.0	4.4	7,434.0	6.5	1.0	0.0	-100.0
Unidentified	1.0	0.0	0.0	0.0	1.0	0.0	201.3
Austria	2.0	0.0	2.0	0.0	1.0	0.0	-25.5
Italy	5,980.0	1.5	0.0	0.0	1.0	0.0	∞
Other	75,619.0	18.8	18,053.0	15.7	0.0	0.0	-100.0

Source: Trade Data Monitor, LLC

Refined Sugar Exports from Ukraine by Month and Destination, MT (HS 170191, 170199)

Origin	Subtotal Oct-Dec 2020	MY 2020/21	Oct-21	Nov-21	Dec-21	Subtotal Oct -Dec 2021	% Change Oct -Dec 2021 to Oct -Dec 2020
World	52,580	55,172	7,442	13,554	1,942	22,938	-56.38
EU 27 Brexit	9,220	9,673	1,703	4,418	833	6,954	-24.58
Eurasian Economic Union	6,988	6,999	676	3,380	11	4,067	-41.80
Middle East	4,805	6,080	1,743	3,224	0	4,967	3.37
Africa	0	0	1,681	208	208	2,097	∞
South Asia	742	742	0	0	0	0	-100.00
East and Southeast Asia	0	92	0	0	0	0	∞
Uzbekistan	13,042	13,042	0	0	2	2	-99.98
Armenia	6,928	6,928	676	3,380	0	4,056	-41.45
Azerbaijan	6,890	6,903	0	2,237	882	3,119	-54.73
Tajikistan	7,837	8,176	1,017	0	0	1,017	-87.02
Spain	5,658	5,658	766	1,518	0	2,284	-59.63
Israel	2,205	3,480	1,197	3,224	0	4,421	100.50
Romania	2,990	2,990	463	1,257	662	2,382	-20.33
Moldova	2,719	3,033	551	9	4	564	-79.26
Gaza Strip and West Bank	1,300	1,300	520	0	0	520	-60.00
Uganda	0	0	1,456	0	0	1,456	∞
Bulgaria	0	0	213	655	148	1,016	∞
Italy	0	2	0	988	23	1,011	∞
Other	3,007	3,645	582	285	221	1,088	-63.82

Source: Trade Data Monitor, LLC

Refined Sugar Imports to Ukraine by Origin, MY, MT (HS 170191, 170199)

Origin	MY 2018/19 (Oct 18-Sept 19)		MY 2019/20 (Oct 19-Sept 20)		MY 2020/21 (Oct 20-Sept 21)		% Change MY 2020/21 to MY 2019/20
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	1,410	100	1,466	100	40,732	100	2,679
EU 27 Brexit	1,004	71	1,151	79	40,452	99	3,414
Africa	25	2	27	2	67	0	148
Middle East	4	0	2	0	3	0	63
East and Southeast Asia	2	0	2	0	1	0	-58
South Asia	0	0	0	0	0	0	0
Poland	126	9	142	10	27,177	67	19,006
Belgium	1	0	2	0	4,080	10	224,898
Germany	131	9	113	8	3,203	8	2,735
Lithuania	0	0	0	0	2,913	7	0
France	149	11	263	18	2,238	6	753
Sweden	72	5	20	1	348	1	1,637
Denmark	380	27	460	31	339	1	-26
Switzerland	45	3	44	3	103	0	135
United States	309	22	229	16	75	0	-67
Romania	56	4	75	5	71	0	-4
Reunion	0	0	0	0	50	0	0
Austria	8	1	9	1	30	0	242
Finland	14	1	22	1	27	0	25
United Kingdom	10	1	8	1	24	0	200
Mauritius	22	2	25	2	9	0	-66
Other	85	6	55	4	42	0	-24

Source: Trade Data Monitor, LLC

Refined Sugar Imports to Ukraine by Month and Origin, MT (HS 170191, 170199)

Origin	Subtotal Oct-Dec 2020	MY 2020/21	Oct-21	Nov-21	Dec-21	Subtotal Oct -Dec 2021	% Change Oct -Dec 2021 to Oct -Dec 2020
World	481	40,733	111	85	65	261	-45.74
EU 27 Brexit	328	40,454	61	50	27	138	-57.93
Africa	0	67	50	0	4	54	∞
Middle East	2	3	0	0	0	0	-100.00
Switzerland	67	103	0	35	29	64	-4.48
Germany	32	3,204	21	8	21	50	56.25
Romania	29	73	7	11	6	24	-17.24
Belize	0	0	0	0	5	5	∞
Mauritius	0	9	0	0	4	4	∞
Netherlands	0	3	0	0	0	0	∞
Poland	89	27,176	0	0	0	0	-100.00
Reunion	0	50	50	0	0	50	∞
Israel	0	1	0	0	0	0	∞
Lithuania	0	2,914	0	0	0	0	∞
Malawi	0	8	0	0	0	0	∞
Costa Rica	1	4	0	0	0	0	-100.00
Colombia	0	3	0	0	0	0	∞
Croatia	1	2	0	0	0	0	-100.00
Czech Republic	4	6	0	1	0	1	-75.00
Denmark	119	339	0	0	0	0	-100.00
Finland	9	26	5	7	0	12	33.33
France	31	2,239	27	21	0	48	54.84
Slovakia	2	8	0	0	0	0	-100.00
Spain	4	4	0	0	0	0	-100.00
Sweden	5	348	0	0	0	0	-100.00
Turkey	2	2	0	0	0	0	-100.00
United Kingdom	8	24	0	0	0	0	-100.00
United States	75	75	0	0	0	0	-100.00
Austria	2	30	1	0	0	1	-50.00
Belgium	0	4,080	0	0	0	0	∞

Source: Trade Data Monitor, LLC

Raw Sugar Exports from Ukraine by Destination, MY, MT (HS 170111, 170112, 170113, 170114)

Origin	MY 2018/19 (Oct 18-Sept 19)		MY 2019/20 (Oct 19-Sept 20)		MY 2020/21 (Oct 20-Sept 21)		% Change MY 2020/21 to MY 2019/20
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	5,147	100	25	100	1	100	-98
Middle East	0	0	0	0	0	21	167
Eurasian Economic Union	543	11	0	0	0	0	0
Africa	0	0	0	0	0	0	-100
EU 27 Brexit	0	0	22	88	0	10	-100
East and Southeast Asia	0	0	0	0	0	4	-43
Antigua and Barbuda	0	0	0	0	0	0	0
Azerbaijan	2,101	41	0	0	0	0	0
China	0	0	0	0	0	0	0
Comoros	0	0	0	0	0	0	-100
Cyprus	0	0	0	0	0	5	-70
Dominica	0	0	0	0	0	0	0
Georgia	136	3	0	0	0	0	0
Germany	0	0	0	0	0	0	0
Greece	0	0	0	0	0	0	-100
Hong Kong	0	0	0	0	0	4	0
Italy	0	0	0	0	0	2	0
Kyrgyzstan	543	11	0	0	0	0	0
Latvia	0	0	22	87	0	0	-100
Liberia	0	0	0	0	0	0	0
Malta	0	0	0	0	0	4	0
Moldova	0	0	3	12	0	34	-94
Panama	0	0	0	0	0	5	0
Sierra Leone	0	0	0	0	0	0	0
Singapore	0	0	0	0	0	0	-100
Switzerland	0	0	0	0	0	0	0
Tajikistan	1,896	37	0	0	0	0	0
Tanzania	0	0	0	0	0	0	0
Turkey	0	0	0	0	0	21	167
United Kingdom	0	0	0	0	0	26	0
Uzbekistan	471	9	0	0	0	0	0

Source: Trade Data Monitor, LLC

Raw Sugar Exports from Ukraine by Month and Destination, MT (HS 170111, 170112, 170113, 170114)

Origin	Subtotal Oct-Dec 2020	MY 2020/21	Oct-21	Nov-21	Dec-21	Subtotal Oct -Dec 2021	% Change Oct -Dec 2021 to Oct -Dec 2020
World	0	0	0	0	0	0	∞
Moldova	0	0	0	0	0	0	∞

Source: Trade Data Monitor, LLC

Raw Sugar Imports to Ukraine by Origin, MY, MT (HS 170111, 170112, 170113, 170114)

Origin	MY 2018/19 (Oct 18-Sept 19)		MY 2019/20 (Oct 19-Sept 20)		MY 2020/21 (Oct 20-Sept 21)		% Change MY 2020/21 to MY 2019/20
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
<u>World</u>	401.0	100.0	320.0	100.0	123,197.0	100.0	38,432.0
EU 27 Brexit	37.0	9.2	121.0	37.9	279.0	0.2	130.2
Africa	304.0	75.8	142.0	44.5	116.0	0.1	-18.1
South Asia	0.0	0.0	1.0	0.3	1.0	0.0	-2.4
Middle East	37.0	9.1	0.0	0.0	0.0	0.0	0.0
East and Southeast Asia	1.0	0.2	2.0	0.5	0.0	0.0	-92.5
Brazil	0.0	0.0	0.0	0.0	122,705.0	99.6	136,338,288.9
France	0.0	0.0	65.0	20.3	190.0	0.2	192.2
Mauritius	304.0	75.8	142.0	44.4	115.0	0.1	-19.1
Germany	21.0	5.3	43.0	13.6	82.0	0.1	87.9
Costa Rica	0.0	0.0	0.0	0.1	41.0	0.0	17,815.3
United Kingdom	14.0	3.5	11.0	3.4	30.0	0.0	172.7
Switzerland	1.0	0.2	1.0	0.3	22.0	0.0	2,646.8
Austria	4.0	1.0	8.0	2.4	5.0	0.0	-30.6
Colombia	7.0	1.8	18.0	5.7	2.0	0.0	-91.7
Mauritania	0.0	0.0	0.0	0.1	2.0	0.0	947.3
Spain	0.0	0.0	1.0	0.3	2.0	0.0	98.8
India	0.0	0.0	1.0	0.3	1.0	0.0	-2.4
Cuba	0.0	0.0	1.0	0.3	1.0	0.0	-34.5
Canada	0.0	0.0	0.0	0.0	1.0	0.0	0.0
China	0.0	0.0	0.0	0.1	0.0	0.0	-100.0
Czech Republic	0.0	0.0	0.0	0.0	0.0	0.0	-97.1
Belgium	0.0	0.0	0.0	0.0	0.0	0.0	11.4
Israel	37.0	9.1	0.0	0.0	0.0	0.0	0.0
Italy	3.0	0.8	0.0	0.0	0.0	0.0	0.0
Guatemala	0.0	0.0	22.0	6.9	0.0	0.0	-100.0
Netherlands	5.0	1.3	0.0	0.0	0.0	0.0	0.0
Paraguay	0.0	0.1	1.0	0.2	0.0	0.0	-31.0
Philippines	0.0	0.0	1.0	0.2	0.0	0.0	-82.7
Poland	0.0	0.0	0.0	0.2	0.0	0.0	-100.0
Slovakia	4.0	0.9	4.0	1.1	0.0	0.0	-95.2
Argentina	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Thailand	1.0	0.2	1.0	0.2	0.0	0.0	-97.5
Turkey	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Vietnam	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Trade Data Monitor, LLC

Attachments:

No Attachments