



F.O.LICHTS

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HIGHLIGHTS

Russia	614
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Sugar campaign's gap to previous season grows	
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HOW TO SHARE THE VALUE OF BEET AND CANE BETWEEN GROWERS AND FACTORIES

By *Timothé Masson, WABCG¹*

Introduction

The aim of this study is to illustrate how the value of sugar is shared between the beet and cane growers and the factories/mills throughout the world. It has been compiled from 27 replies received from WABCG (World Association of Beet and Cane Growers) members during the summer of 2015.

Information was provided by the following countries:

- **Central and South America:** Belize, Colombia, Guatemala, Honduras, Nicaragua and El Salvador;
- **North America:** Mexico and USA;
- **Africa:** South Africa, Ivory Coast, Kenya, Morocco, Mauritius, Swaziland and Tanzania;
- **Asia:** India, Japan and Thailand;
- **Europe:** European Union (of which Germany, Belgium, France (incl. Réunion Island), Denmark, Romania and Turkey);
- **Oceania:** Australia and Fiji.

The study only deals with the independent grower. Generally speaking,

¹World Association of Beet and Cane Growers. The views expressed in this article are solely its author's; they do not represent the views of F.O. Licht.

it can be said that the share of the sugar value to the beet grower is usually in a range of 40 to 60%, and of 50 to over 70% to the cane grower. In most cases, this value is fixed *a priori*. But there are so many rules for fixing the price so there are countries and there is no sense in comparing these situations without looking in very precise detail at the different sugar policies and local sectors.

However, from the diversity observed, three fundamentals are systematically brought to light and will be addressed in turn:

- How and according to what rules is the beet/cane price fixed?
- What market segmentation is used to obtain this price? In how much detail and which products/co-products are taken into consideration?
- And finally, what guarantees does the grower have and to what extent can he be involved in the sharing and controlling system?

1. How is the price of beet/cane decided and fixed?

Government-fixed prices

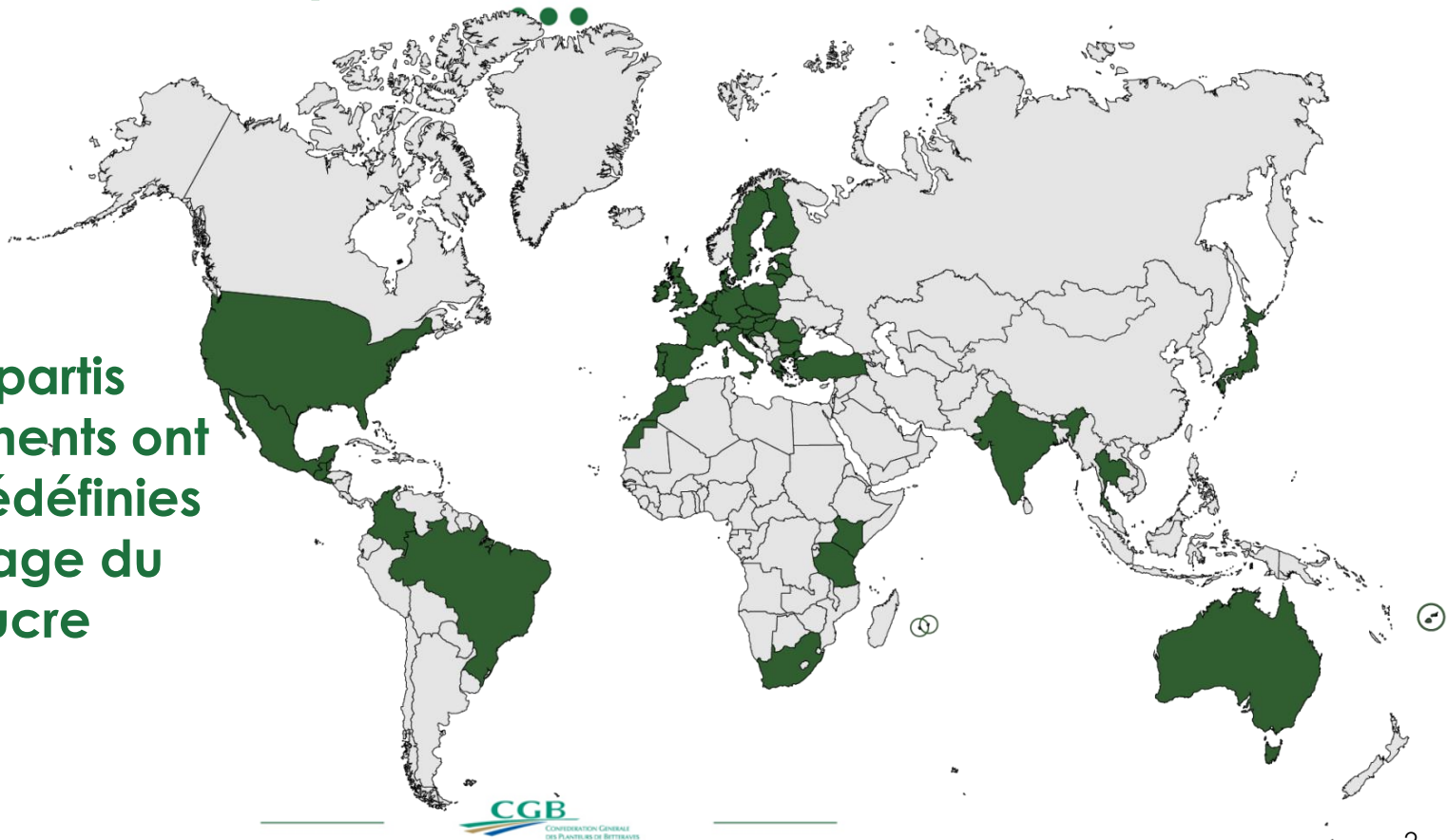
In some countries the beet/cane price is more or less directly imposed by government states in order to protect the growers. In such cases, the

Comment est partagée la valeur des produits issus de la canne à sucre / betterave à travers le monde ?



Un partage du prix quasi systématique entre planteurs et fabricants

25 pays répartis sur les 5 continents ont des règles prédéfinies pour le partage du prix du sucre





Part planteur dans le prix du sucre

...

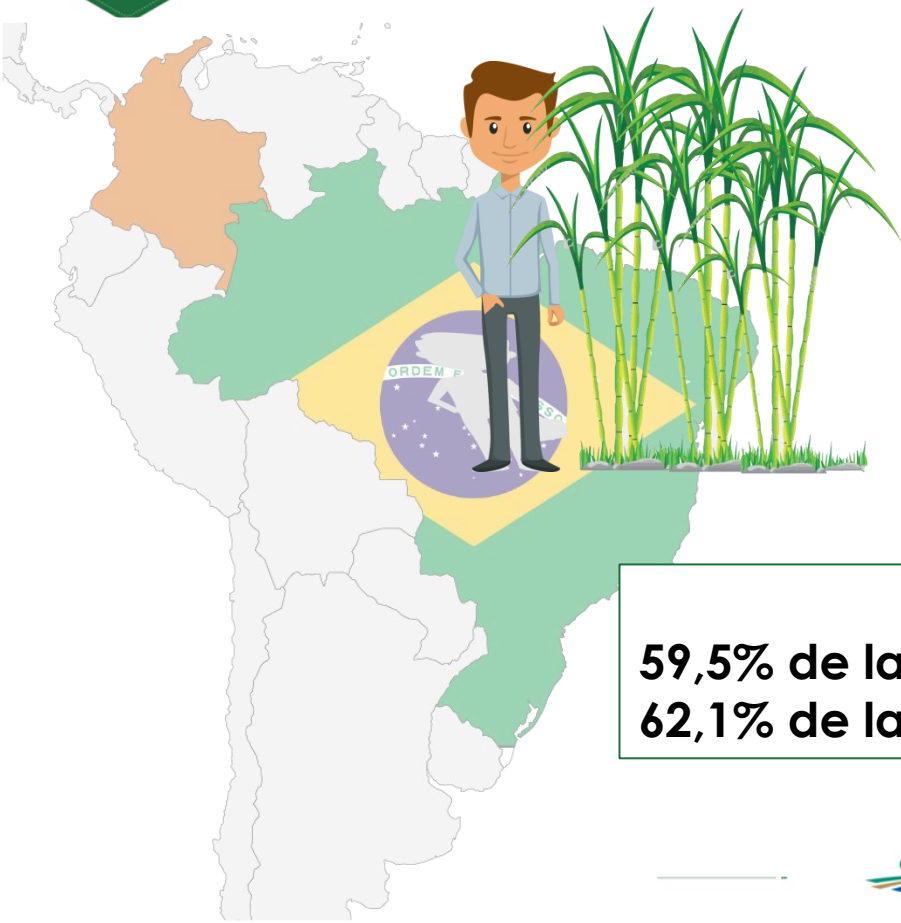
En betterave : 40 à 60%

En canne à sucre : 50 à 70%



Exemple du Brésil

...



L'usine vend le
sucre et
l'éthanol

Le planteur reçoit
59,5% de la valeur moyenne du sucre
62,1% de la valeur moyenne de l'éthanol



Ce pourcentage de la valeur s'applique à :

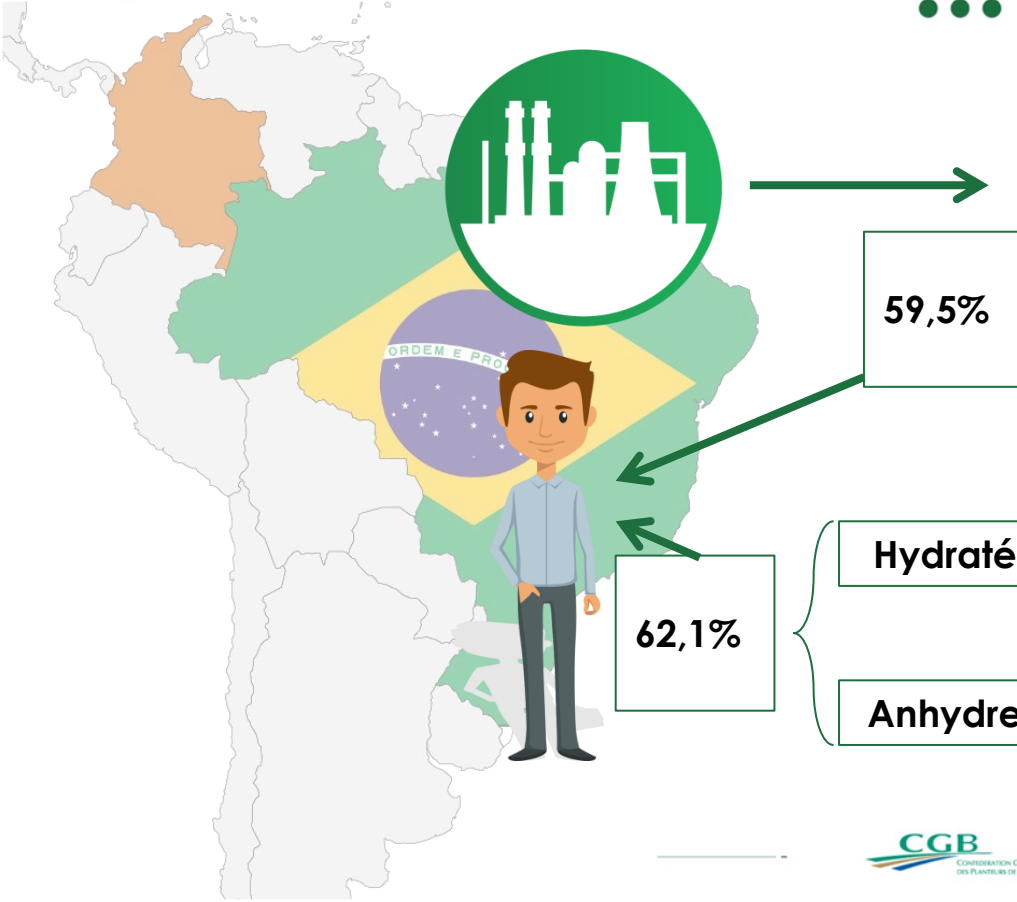
Quel prix du sucre ?

Quel prix de l'éthanol ?



Segmentation des marchés : Exemple du Brésil

...



59,5%

62,1%

Hydraté

Anhydre

9 Segmentations

Sucre

Prix
Domestique
x volume

Prix
Brut Export
x volume

Prix
Raffiné export
x volume

Ethanol

Prix
Carburant
Domestique
x volume

Prix
Carburant
Exporté
x volume

Prix pour
l'industrie
x volume

Prix
Carburant
Domestique
x volume

Prix
Carburant
Exporté
x volume

Prix pour
l'industrie
x volume



Segmentation régionale des marchés : le cas du Mexique

•••

Six zones, six prix distincts.

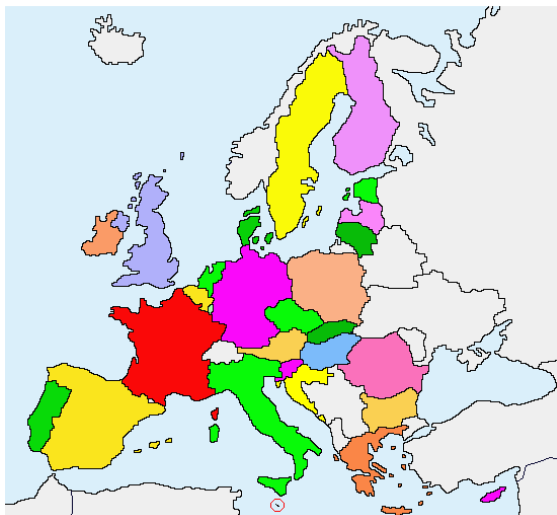




Segmentation régionale des marchés : le cas de l'Union européenne



Observatoire des prix du sucre
Autant de prix que de pays





Contrôle à posteriori



- Soit par un tiers privé
 - USA, Salvador
- Soit par l'interprofession elle-même
 - Afrique du Sud, Colombie, Australie, Maurice, Swaziland
- Soit par la puissance publique
 - Brésil, UE, Thaïlande, Mexique



Gestion du risque en Australie

...



Le planteur fixe le prix du sucre
et donc de sa canne, grâce
aux marchés à termes

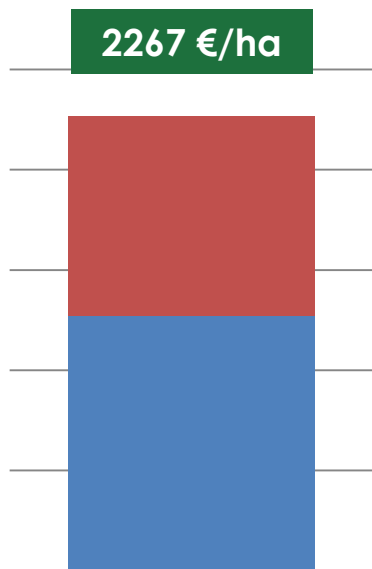
2/3 de sa production





Coût de production par hectare de betterave

...



Charges Opérationnelles

Charges Fixes + MSA

Avec un rendement de **89 t/ha**
on obtient un cout de
production de
25,5€/t de betterave à 16° soit
170€/t de sucre

89t/ha rdt moyen 5 ans
1 tonne de sucre = 6,7 tonnes de betteraves



Coût de production = recette

...

