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Report Name: Sugar Annual

Country: Ukraine

Post: Kyiv

Report Category: Sugar

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Report Highlights:

MY2020/21 sugar production is forecast down to over 1.5 million metric tons, representing another step in a downward trend that has continued over the last three years. Local sugar producers are squeezed between a gradually shrinking domestic market, which represents the lion's share of their consumers, and decreasing world prices making exports less attractive. In order to stay afloat, sugar producers are working on increasing the quality of sugar produced, as well as putting more effort into diversification, selling by-products and moving into biofuels.

In completing this report, FAS Kyiv attempted to weigh possible implications related to the COVID-19 pandemic and its impact on Ukrainian sugar production and trade. Since there are too many unknown factors impacting both the Ukrainian and the global economy, this report is based on a conservative scenario. In completing the report, Post assumed: a drop in Ukrainian economic growth of approximately seven percent for 2020 and a zero growth rate for 2021; an absence of significant disruptions in international trade; and no hike in mortality rates in Ukraine. Since Ukraine predominantly produces sugar to meet domestic demand, with the small excess exported, Post does not envisage a significant impact of COVID-19 on the national sugar industry. Domestic demand for sugar should be inelastic under the assumed decrease in economic growth. Sugar exports as a share of total sugar production dropped from 25 percent in MY2018/19 to around 12 percent forecast for MY2020/21. Ukrainian sugar export volumes are not tied to a specific market, but rather are spread among a number of destinations. Under these conditions it is unlikely that Ukrainian sugar exports in MY2020/21 will be significantly impacted by COVID-19 implications.

According to data from the State Statistic Service of Ukraine (SSSU), over 90 percent of sugar beet production area is attributed to agricultural enterprises. According to industry sources, a major number of these enterprises are large, vertically integrated agricultural businesses called agro holdings, which are also involved in sugar processing. Their business model allows them 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 area is grown under contract with small and medium farmers, who supply raw material (sugar beets) to those large processors.

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 producer, 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 the lowest level of 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. Sugar beet farmers are dependent on the pricing policies of the sugar processing facilities in their region because the logistical costs for sugar beets prevent shipments to competitive processors.

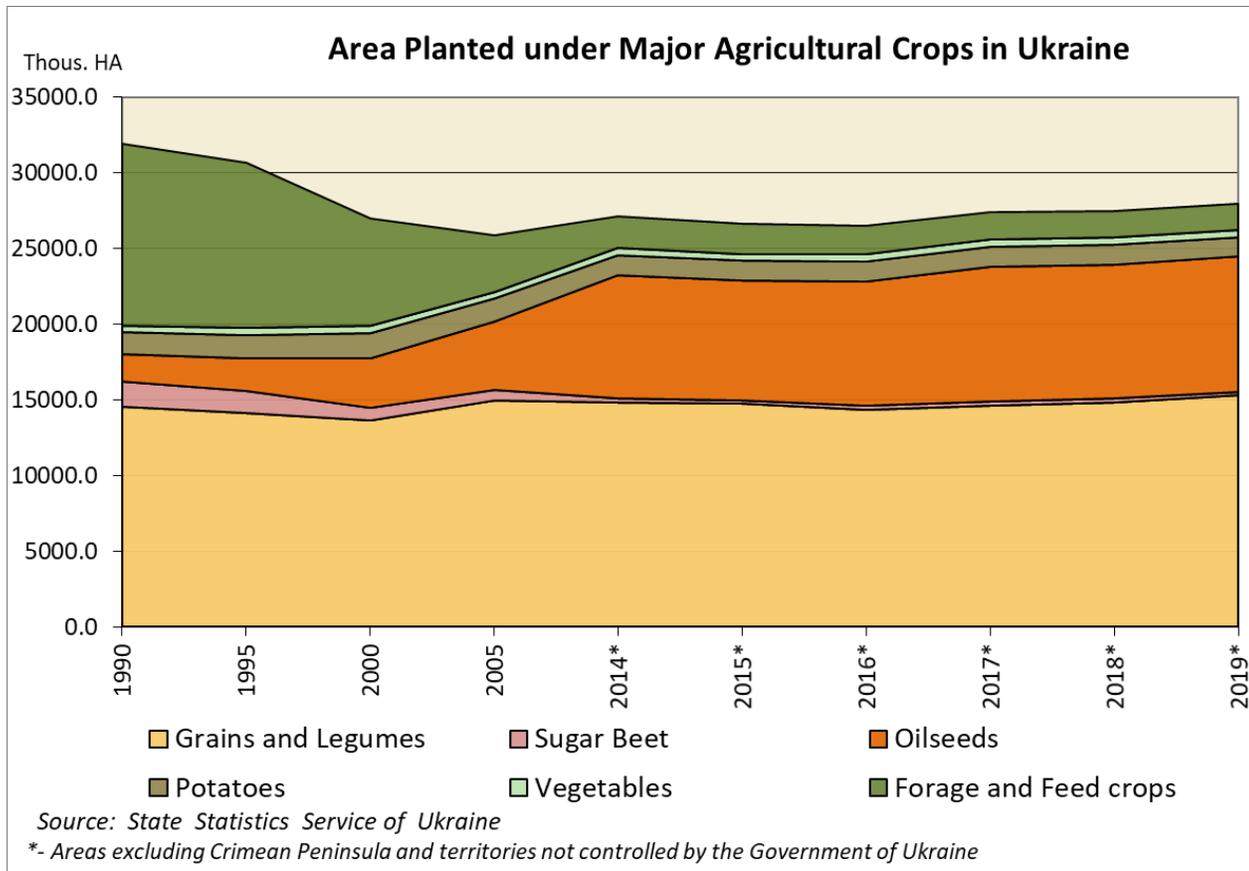
Profitability and Area Planted under Major Agricultural Crops in Ukraine
(thousand hectares, %, Calendar Years)

	1995	2000	2013	2014	2015	2016	2017	2018	2019*
Grains & Pulses Area	14,152	13,646	16,210	14,800	14,728	14,349	14,602	14,839	15,279
Grains & Pulses Prof.	86%	65%	2%	26%	43%	38%	25%	25%	-
Soybean Area	25	65	1,370	1,806	2,147	1,846	1,997	1,716	1,609
Soybean Prof.	-	-	33%	35%	39%	52%	29%	21%	-
Sunflower Area	2,020	2,943	5,051	5,257	4,965	5,904	6,020	6,117	5,928
Sunflower Seed Prof.	171%	52%	28%	37%	81%	63%	41%	33%	-
Rapeseed Area	49	214	1,017	882	684	456	788	1,042	1,278
Rapeseed Prof.	-	-	9%	29%	44%	45%	44%	31%	-
Sugar Beets Area	1,475	856	280	331	239	292	316	276	221
Sugar Beets Prof.	31%	6%	3%	18%	28%	24%	12%	-11%	-

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

The Profitability and Area Planted under Major Agricultural Crops in Ukraine table, above, indicates that 2018 was the first year that sugar beet growers experienced negative profitability. This significantly changed the experience for farmers versus agro holdings. The large agro holdings can use their own sugar processing plants and related businesses (e.g. confectionary) to redistribute the burden of unfavorable market conditions for sugar across various divisions (production of grains, oilseeds, animal farms etc.) and fully utilize the effects of economies of scale. These companies have sufficient financial resources to modernize their processing facilities, as well as invest in higher-yield seeds, further cutting their costs. Agro holdings could also 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.

The economics of sugar beet production make 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).

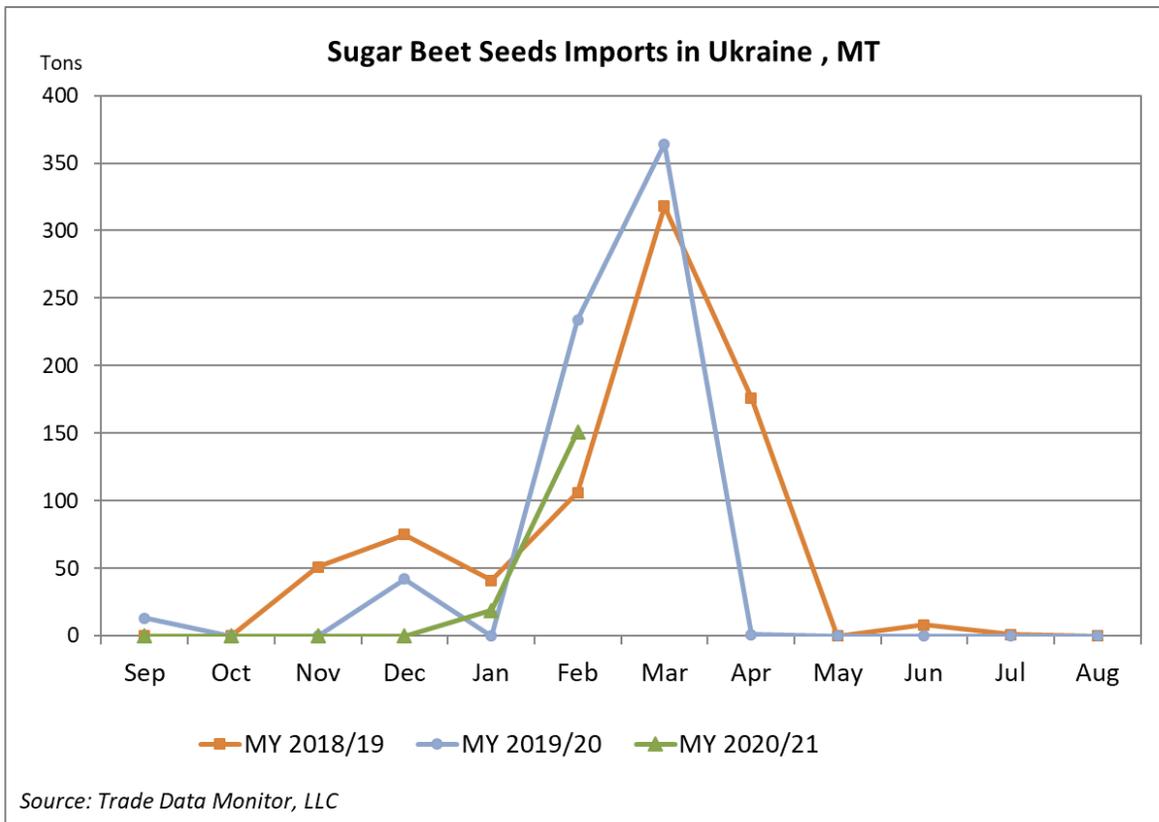


According to the SSSU, MY2019/20 sugar beet harvested area was 221 thousand ha, a 20 percent decrease compared to the previous MY. As a result of the decrease in area, MY2019/20 sugar beet production volume dropped to 10.2 million metric tons (MMT), a 27 percent decrease from the previous MY.

FAS Kyiv forecasts MY2020/21 production area at 210 thousand ha, a five percent decrease compared to the previous MY. Post forecasts a decrease in production area based on a combination of the following factors:

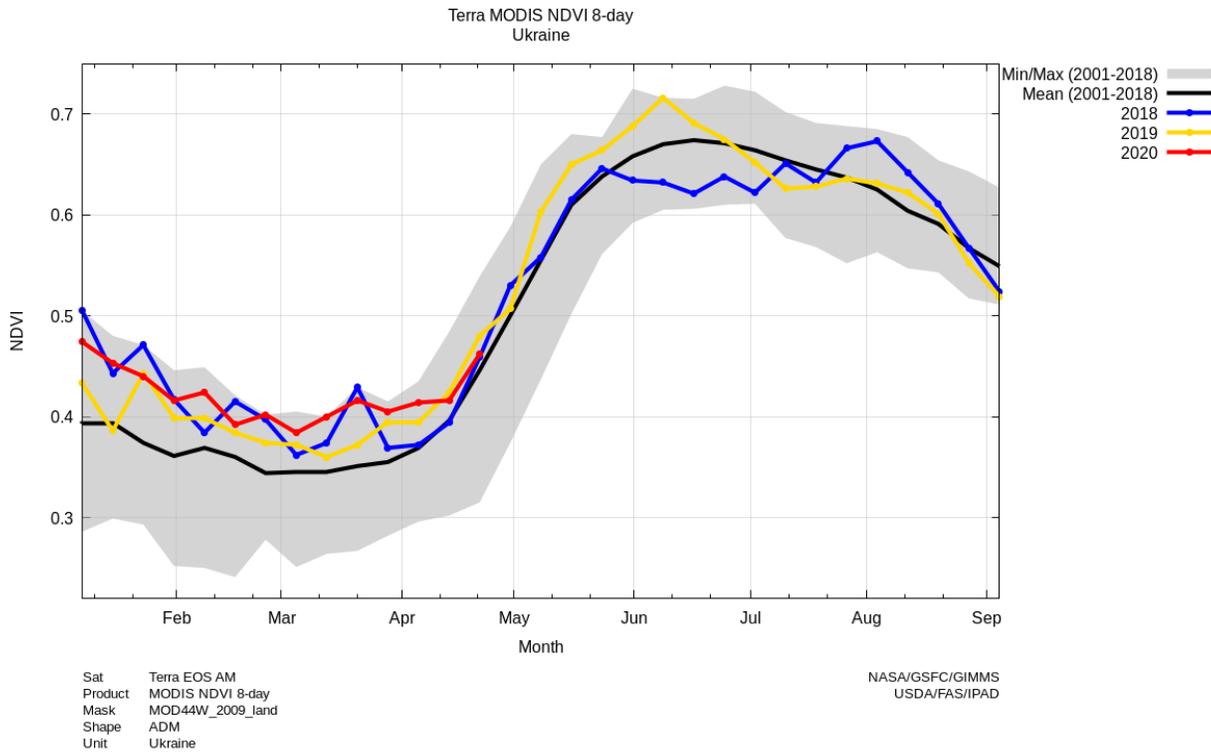
- Sugar production is predominantly oriented toward supplying the domestic market, with any surplus for export kept in stock until international prices allow for profitable exports;
- Sugar-processing capacity is concentrated in the hands of a limited number of market players that have previously experienced a price collapse due to overproduction;
- Negative profitability does not encourage new investment in sugar beet production as a standalone business;
- Domestic sugar prices remain relatively stable (please refer to the Consumption section for more details), which does not suggest any increase in profitability for this crop at the time of the report writing;

- The emergence of a fully functioning land market will likely increase the appetites of agricultural producers for more profitable crops, such as grains and oilseeds (please refer to Policy section for more details); and
- The dynamics of imported sugar beet seeds (please refer to Sugar Beet Seeds Imports graph below) confirms the assertion that sugar beet production area will decrease in 2020 compared to planted area in 2019.



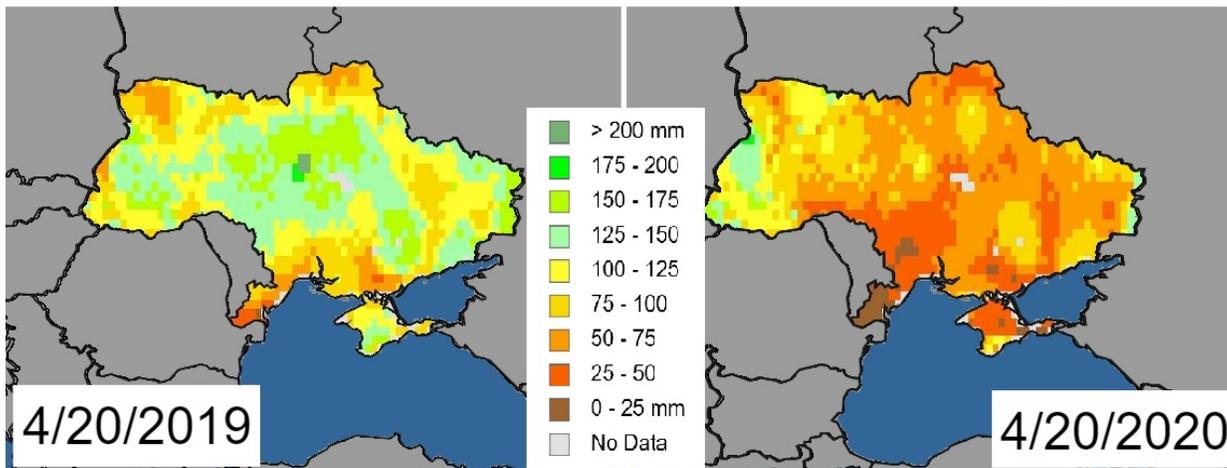
According to data from the Ministry of Economic Development, Trade and Agriculture of Ukraine (MEDTA), national producers have already planted around 200 thousand ha of sugar beets as of April 27, 2020.

Below is a graph that shows the Normalized Difference Vegetation Index (NDVI) for Ukraine, a standardized measure of healthy vegetation. High NDVI values indicate healthier vegetation. Low NDVI values indicate low or no vegetation. As of the end of 2019, the NDVI for Ukraine was at a similar level as it was during the same period in 2018. At the same time, the NDVI level in April 2020 was similar both for 2018 and 2019 levels during this month.

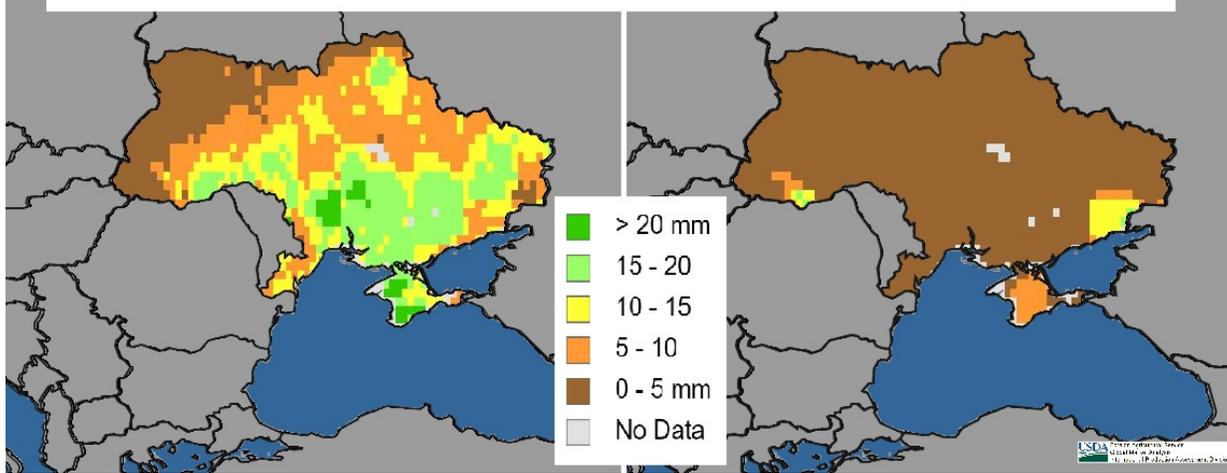


In order to ensure a more accurate forecast for sugar beet yields for MY2020/21, FAS Kyiv analyzed moisture both at the sub-surface and the surface levels as of the end of April 2020 against the moisture levels at the end of April 2019 (please refer to the image below for more details). Both the 2020 surface and sub-surface moisture levels suggest worse growing conditions in 2020 compared to growing conditions in 2019. The third set of images, Number of Days since Rain, suggest that rain occurred recently in Ukraine. These recent rains could potentially replenish soil moisture, especially topsoil which is essential for seed germination. However, the quantity and quality of these rains will only become evident after completion of this report. Based on these contrasting conditions, FAS Kyiv forecasts 2020 sugar beet yields at the five-year average level.

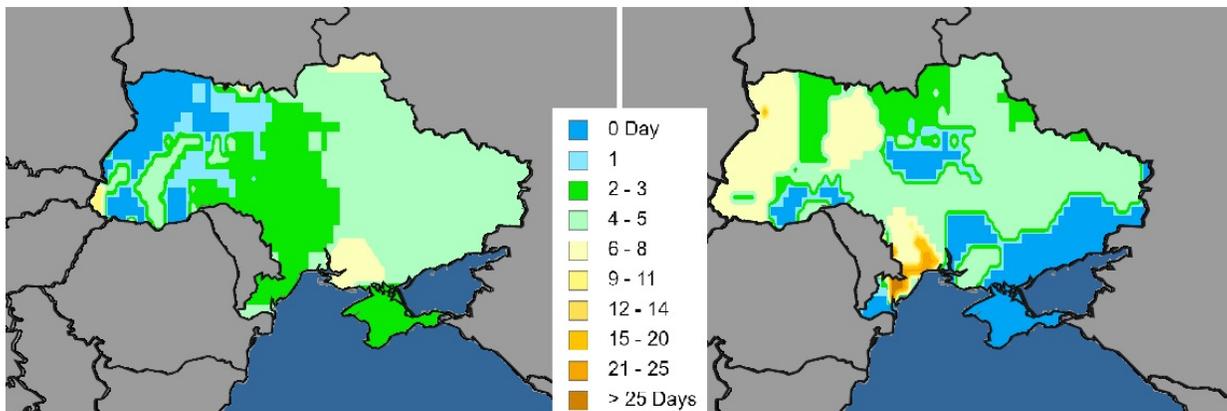
Sub-Surface Soil Moisture USAF 557th WW (Dekad)



Surface Soil Moisture USAF 557th WW (Dekad)



Number of Days Since Rain USAF 557th WW (Week)



Based on the abovementioned area and yield assumptions, FAS Kyiv forecasts the MY2020/21 sugar beet production volume at 9.9 MMT, three percent lower than the MY2019/20 production volume (10.2 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 MY2019/20 estimated harvested area is three percent higher than the official USDA data, based on the available SSSU data.

Post’s MY2018/19 and MY2019/20 estimated production volumes are two and one percent higher, respectively, than official USDA data, based on available SSSU data.

Sugar Beets Market Begin Year	2018/2019		2019/2020		2020/2021	
	Sep 2019		Sep 2020		Sep 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Ukraine						
Area Planted	279	279	218	222	0	210
Area Harvested	276	275	214	221	0	209
Production	13649	13968	10122	10205	0	9886
Total Supply	13649	13968	10122	10205	0	9886
Utilization for Sugar	13649	13968	10122	10205	0	9886
Utilizatn for Alcohol	0	0	0	0	0	0
Total Distribution	13649	13968	10122	10205	0	9886

(1000 HA) ,(1000 MT)

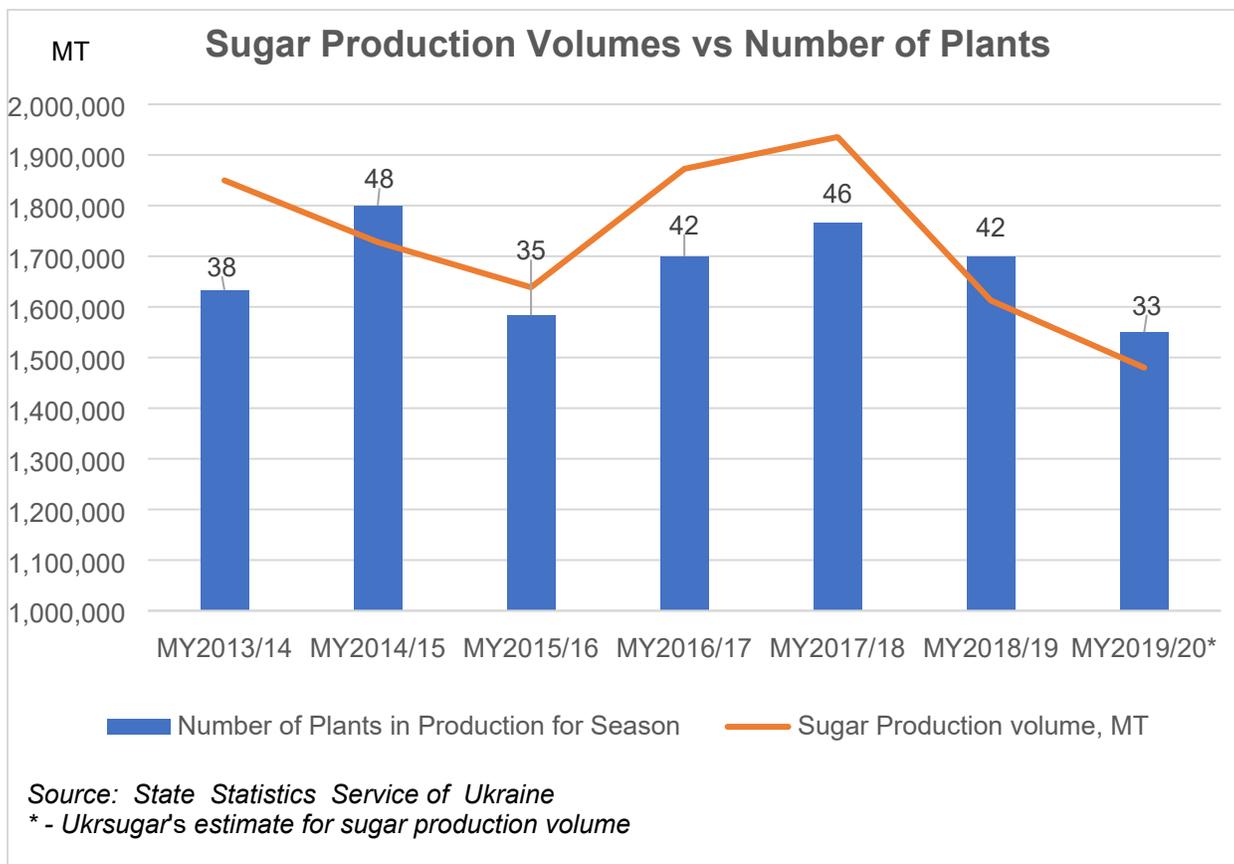
Commodities:
Sugar, Centrifugal

Production:

The Ukrainian national association of sugar producers, “UkrSugar,” reported MY2019/20 sugar production at 1.48 MMT, a 19 percent decrease compared to the previous marketing year. FAS Kyiv accepted this as the initial estimate for MY2019/20 production volume (note that FAS estimates are done in raw value basis, please refer to the PSD Table below for more details).

MY2020/21 sugar production is forecast at around 1.5 MMT, a three percent decrease compared to the MY2019/20 estimate, based on the forecasted sugar beet production volume discussed in the relevant section above.

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



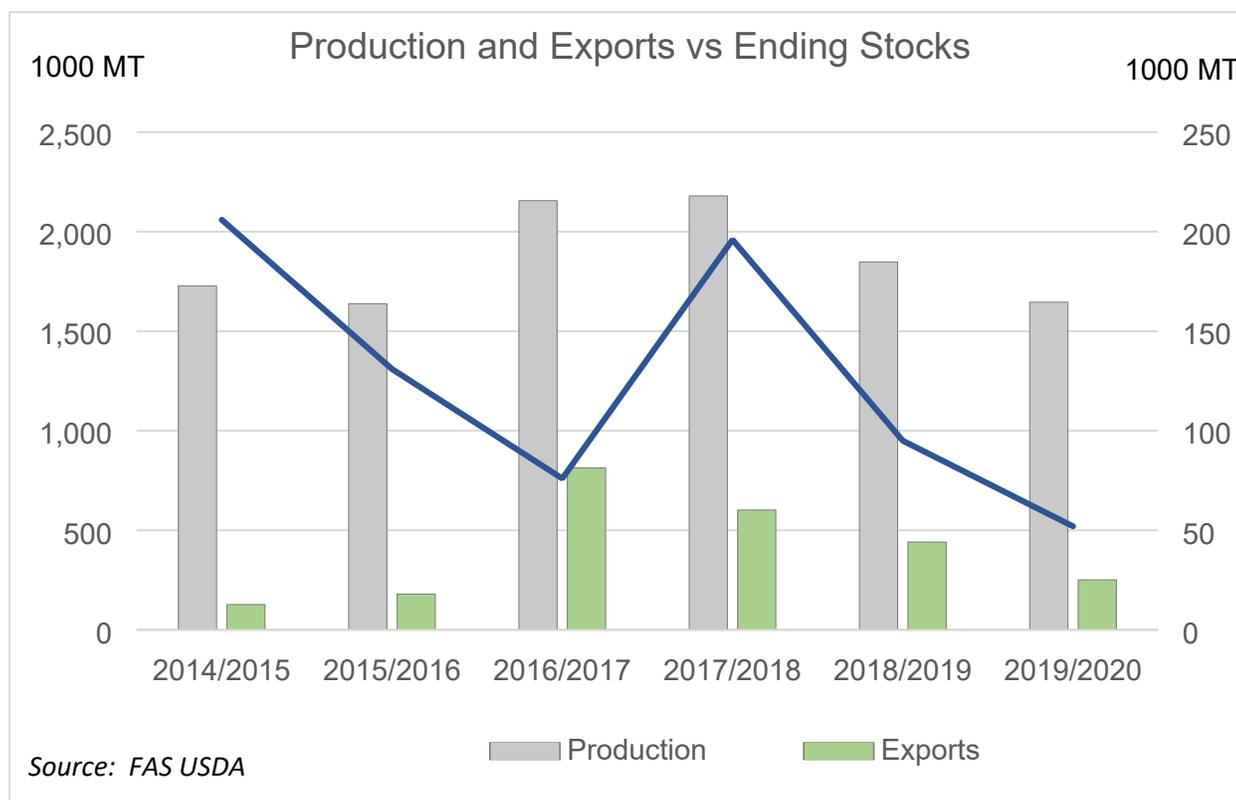
Facility owners use a variety of methods to remain competitive, keeping production costs down and revenues up. In the production process they replace natural gas with biogas that is derived from sugar

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 in order to obtain a better price. According to Ukr sugar, in 2019 large sugar producers' output of high-quality sugar (local I-category) comprised 80 to 90 percent of total sugar output. 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:

Sugar producers are expected to keep their MY2019/20 ending stocks low after they soared at the end of MY2017/18. Please refer to graph Production and Exports vs Ending Stocks below and our previous [Sugar Annual report](#) for more details.

This is not a unique situation. Previously, the industry experienced several years of growing production that reached levels above domestic demand. Weak exports and large stocks then triggered a drop in profitability for the Ukrainian sugar industry. This resulted in a decline in sugar production to the point that available stocks were largely consumed domestically or exported.

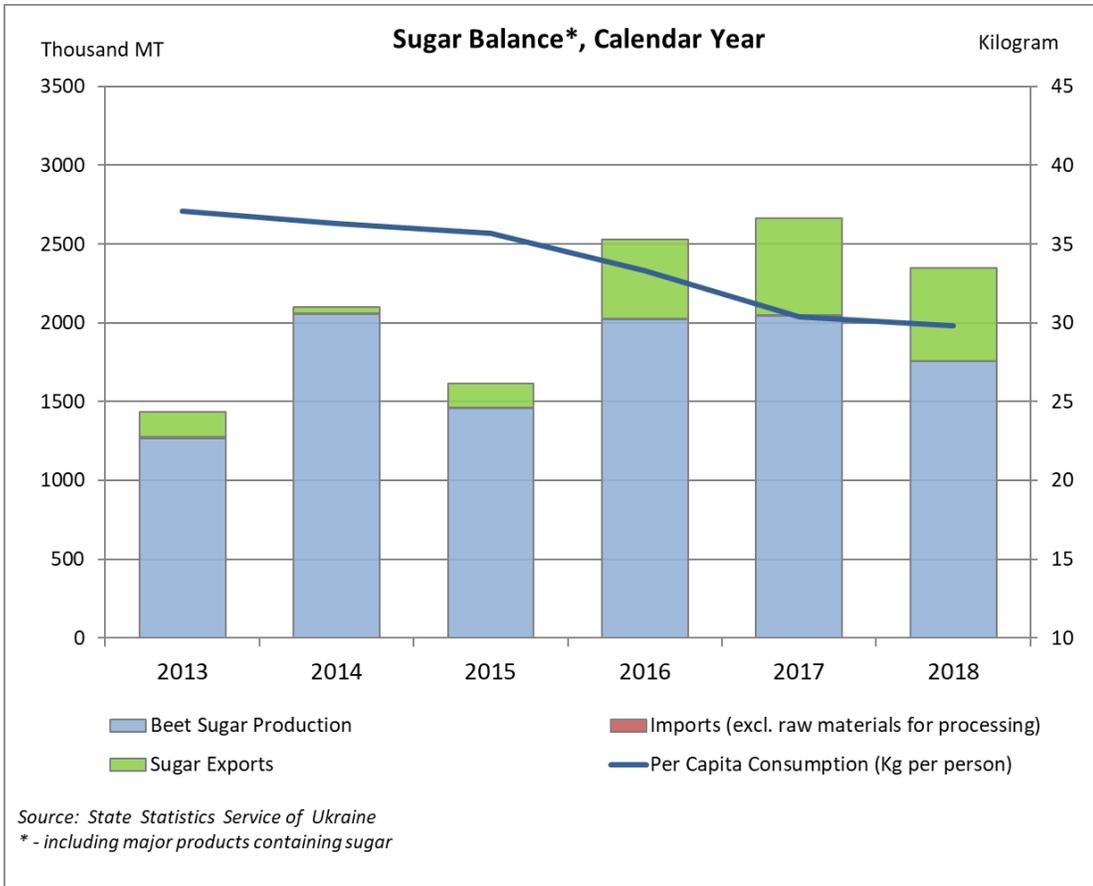


Consumption:

Refined sugar consumption in Ukraine has been slowly decreasing due to a declining population as well as 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 the country has been gradually decreasing (please refer to Sugar Balance Graph below).

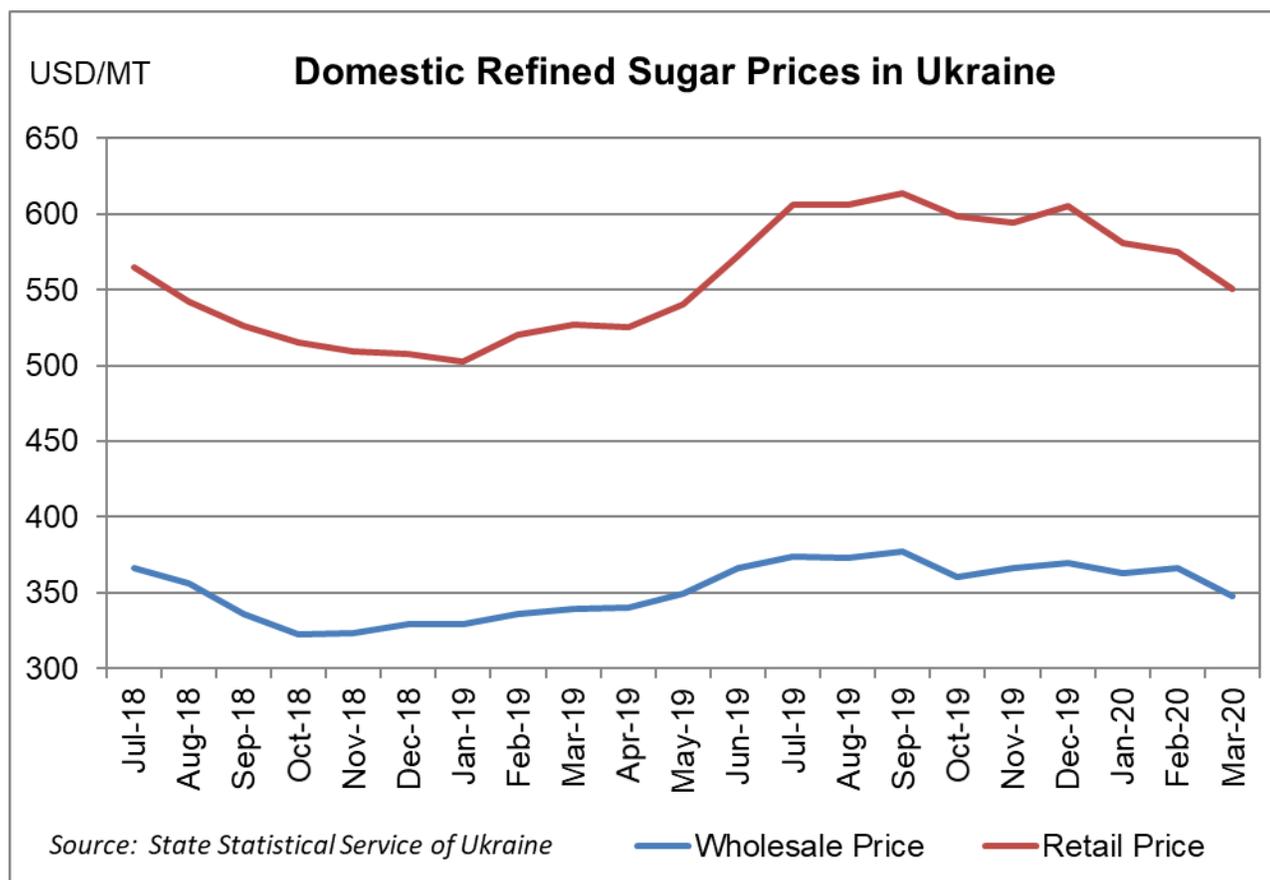


Post estimates that per capita consumption decreased in 2019 and in early 2020. Major processors that utilize sugar in their production process include bakery, condensed milk and confectionary products. According to SSSU’s data, production volumes for these processors decreased in 2019. However, a decrease in Ukrainian imports of high-intensity sweeteners (in sugar equivalent) in both MY2017/18 and MY2018/19 (please refer to Trade Section for more details), helped support domestic sugar consumption.

FAS Kyiv considers that this downward trend seen in 2019 and early 2020 will continue through 2020 and into 2021.

FAS Kyiv believes that domestic sugar consumption will decrease around three percent in both MY2019/20 and MY2020/21. Post’s assumption remains valid unless: there are significant changes in domestic economic policy that result in an increase in disposable incomes, and/or new export markets open for Ukrainian confectionary products. Another factor that could trigger immediate changes in domestic sugar consumption is a change in imports of high-intensity sweeteners.

In MY2018/19 and early MY2019/20, the wholesale price for domestic refined sugar (please refer to the Domestic Refined Sugar Prices in Ukraine graph, below, for more details) was relatively stable with only slight fluctuations induced by variations in the exchange rate. However, retail prices had more of an upward trend at the beginning of the summer of 2019, which could be associated with people making home-made jams out of the fresh fruits widely available during this period.



Trade:

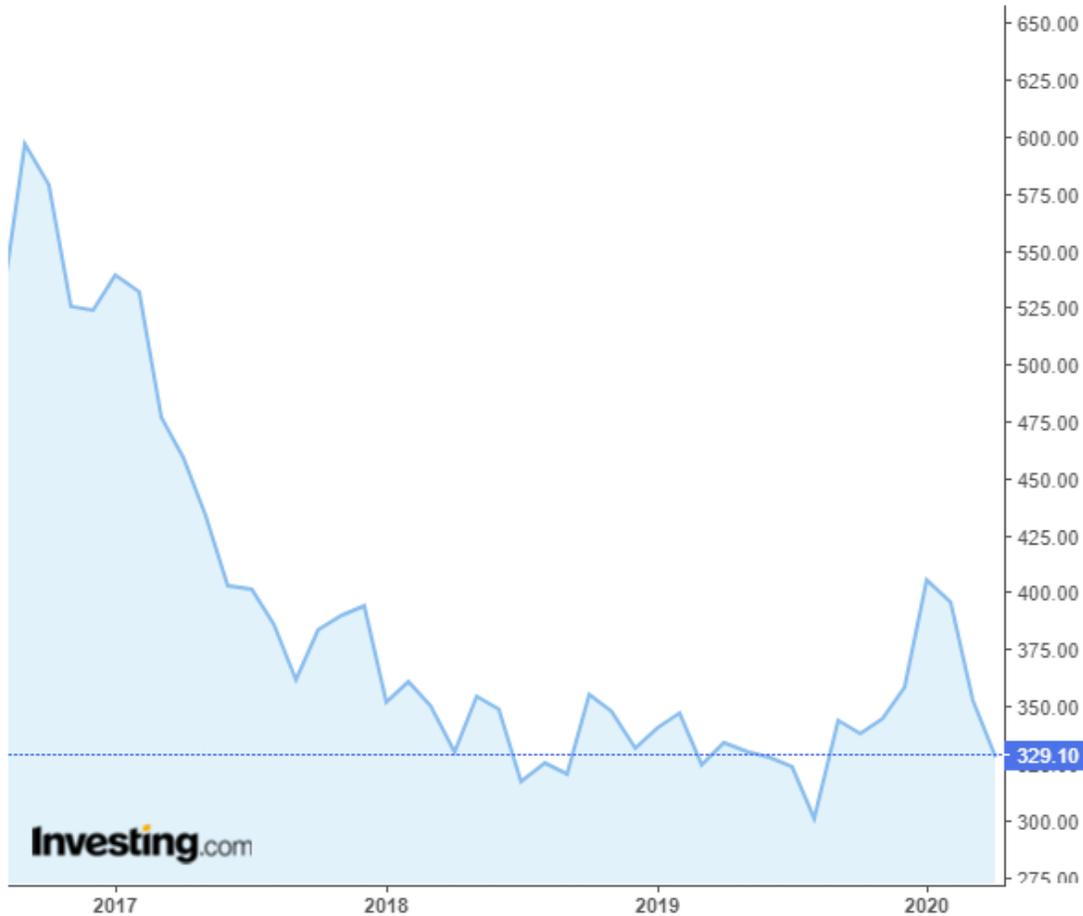
Ukraine is a net exporter of refined beet sugar. Exports predominantly serve as a vehicle for removing excess sugar production from the domestic market, thereby preventing an accumulation of stocks (please refer to Production Section for more details).

Exports are highly reliant on international prices, which were volatile for two consecutive marketing years (MY2018/19 and the beginning of MY2019/20). However, international prices were significantly

lower than they were in MY2017/18 (please refer to London Sugar Futures graph below for more details).

Published on Investing.com, 21/Apr/2020 - 16:37:12 GMT, Powered by TradingView.

London Sugar Futures, United States, ICE:LSU, M



Ukraine's exports of refined sugar in MY2018/19 were 403 thousand metric tons (TMT), a 27 percent decrease compared to the previous marketing year. This decrease was the result of reduced production volumes triggered by falling sugar prices in international markets, discussed earlier. Ukrainian sugar exporters pulled out of a number of African countries (a 71 percent decrease in export volumes). However, at the same time, Ukraine regained a foothold in some of their traditional markets like Azerbaijan and Tajikistan and reclaimed their position in EU markets with exports of 52 TMT, compared to just over three TMT in the previous marketing year. It should be noted that exports to the EU well exceeded the 20 TMT Tariff Rate Quota (TRQ) offered to Ukraine by the EU under the Deep and Comprehensive Free Trade Area (DCFTA).

Refined sugar exports dropped to 42 TMT at the beginning of MY2019/20 (October 2019 - February 2020), a 17 percent decrease over the same period of the previous year. The EU became the largest

destination (around 17 TMT), followed by Russia (five TMT) and the United Kingdom (around seven TMT). Lebanon became a new market, receiving more than five TMT.

Based on the aforementioned information, FAS Kyiv estimates MY2019/20 refined sugar exports at around 200 TMT. Post's exports forecast for MY2020/21 is 185 TMT, an eight percent decrease compared to the previous MY estimate.

Ukraine's exports of raw sugar in MY2018/19 hiked to over five TMT, a threefold increase compared to the previous marketing year. This increase in exports is primarily due to exports to four countries: Azerbaijan (2.1 TMT), Tajikistan (around 1.9 TMT), Kyrgyzstan and Uzbekistan (around 0.5 TMT each). Trade dynamics observed during the period October 2019 to February 2020 suggest that this surge in exports was a one-time event, thus Post's estimate of raw sugar exports in MY2019/20 is one TMT.

Ukraine's imports of refined sugar were low – 1,410 metric tons (MT) for MY2018/19. These were predominantly premium-class products mostly brought from Denmark (380 MT), the United States (309 MT), France (149 MT) and Germany (131MT). Import volumes for this product remained relatively stable over the last three years. Trade dynamics during the period October 2019 to February 2020 suggest that the same trend would stretch into MY2019/20.

Imports of raw sugar were low: 401 MT for MY2018/19, despite the availability of an import tariff quota for raw cane sugar (please refer to Policy Section for more details). According to the sugar industry, Ukrainian imports of raw sugar were no longer economically feasible due to technological advances in both sugar beet production and processing that resulted in cost cutting (please refer to Production Section for more details).

Based on available import trends, FAS Kyiv sets refined sugar imports at two TMT both for MY2019/20 and MY2020/21.

Due to Ukraine's developed processing industry, the total volume of imports of high-intensity sweeteners (such as aspartame, sucralose, saccharin, monk fruit, stevia, acesulfame, neotame and cyclamates) was around 17 TMT for MY2018/19 (please refer to High-Intensity Sweeteners Table below for more details). According to FAS Kyiv estimates, based on FDA's Multiplier of Sweetness Intensity, the amount of sweeteners imported is equivalent to 400-500 TMT of beet sugar. 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 2018/19 to MY2017/18
			MY 2016/17 (Oct. 16- Sept. 17)	MY 2017/18 (Oct. 17- Sept. 18)	MY 2018/19 (Oct. 18- Sept. 19)	
130219	Vegetable Saps And Extracts, Nesoi	MT	115	108	101	93.52
		Mln. USD	3.60	4.42	5.31	120.12
1702	Sugars Nesoi, Incl Chem Pure Lactose Etc; Caramel	MT	11,833	25,930	15,048	58.03
		Mln. USD	10.10	15.67	12.64	80.66
292429	Cyclic Amides, Derivatives And Salts Of, Nesoi	MT	1,579	728	1,109	152.34
		Mln. USD	11.40	12.18	13.23	108.56
292511	Saccharin And Its Salts	MT	74	22	23	104.55
		Mln. USD	0.54	0.21	0.19	91.70
292990	Compounds Nesoi With Nitrogen Function Nesoi	MT	91	67	100	149.25
		Mln. USD	0.52	0.72	0.72	99.65
293219	Cmpds Cont An Unfused Furan Ring Etc Nesoi	MT	36	47	41	87.23
		Mln. USD	1.58	1.91	1.68	87.77
293499	Nucleic Acids & Salts; Other Heterocyclic Cmp, Nes	MT	357	256	308	120.31
		Mln. USD	23.89	29.05	24.30	83.66
294200	Organic Compounds Nesoi	MT	2	16	5	31.25
		Mln. USD	0.04	0.12	0.24	200.67
	Total Estimated Sugar Equivalent for Imported Sweeteners*	MT	522,933	465,530	432,548	92.92

Source: Trade Data Monitor, LLC; *- based on the FDA's estimates

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 MY2018/19 and MY2019/20 beet sugar production estimates are approximately five and two percent lower, respectively, than the official USDA estimates based on SSSU's data.

Post's MY2018/19 raw export estimate is fivefold higher than USDA's official estimate based on available trade data.

Post's MY2019/20 refined export estimate is 20 percent lower than USDA's official estimate based on trade dynamics.

Post's MY2018/19 and MY2019/20 human domestic consumption estimates are four and two percent lower than the official USDA estimates, based on factors discussed in the Consumption section of this report.

Sugar, Centrifugal Market Begin Year Ukraine	2018/2019		2019/2020		2020/2021	
	Oct 2018		Oct 2020		Oct 2021	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	196	196	95	58	0	58
Beet Sugar Production	1848	1753	1646	1609	0	1559
Cane Sugar Production	0	0	0	0	0	0
Total Sugar Production	1848	1753	1646	1609	0	1559
Raw Imports	0	0	0	0	0	0
Refined Imp.(Raw Val)	2	2	2	2	0	2
Total Imports	2	2	2	2	0	2
Total Supply	2046	1951	1743	1669	0	1619
Raw Exports	1	5	1	1	0	1
Refined Exp.(Raw Val)	440	438	250	200	0	185
Total Exports	441	443	251	201	0	186
Human Dom. Consumption	1430	1370	1360	1330	0	1300
Other Disappearance	80	80	80	80	0	80
Total Use	1510	1450	1440	1410	0	1380
Ending Stocks	95	58	52	58	0	53
Total Distribution	2046	1951	1743	1669	0	1619
(1000 MT)						

Policy:

On April 30, 2020, the Ukrainian Parliament adopted the Land Law 2178-10 ([in Ukrainian](#)) opening the way for the buying and selling of agricultural lands in Ukraine, although with some limitations at the initial stage. Upon land titling and consequent privatization of collective farms that started in late 1999, Ukraine imposed a temporary ban on land sales in 2001. This ban lasted for almost 20 years. Private individuals who received land titles during privatization were limited in their ownership rights and land plots could only be inherited.

Ukraine's new President Volodymyr Zelensky, assumed office in May 2019 with land reform set as the number one priority. Although Zelensky's party, Servant of the People, held a majority leadership in Ukraine's Parliament (the Rada), passage of the law has been fraught with controversy. Ukrainian officials had to compromise between the opinions of different stakeholder groups (farmers, large agricultural producers and the general public) while fine-tuning a land tenure model. Law #2178-10 ([in Ukrainian](#)) is still to be signed by President Zelensky at the time of the report writing.

A final draft of the law has not yet been made available. Post notes below some of the key parameters of the legislation based on local media reports and comments from Ukrainian officials:

- The Land Market will become functional on July 1, 2021.
- Land can be owned by private individuals, business entities established solely by Ukrainian residents, or by state and local municipalities. If received as collateral, the land must be sold by banks within a two-year period.
- Initially, in July 2021, the land market will be open to private individuals. The maximum ownership is 100 ha per person. Legal entities will be allowed to purchase land in 2024 and the ownership limit for legal entities is set at 10 thousand hectares.
- State lands and lands owned by local municipalities will not be allowed for sale.
- The decision whether foreign business entities will be allowed to buy land will be based on the results of a public referendum that will most likely be held later this year. However, should foreign ownership be approved, no foreign business entities will be allowed to purchase land within 50 km of the border of Ukraine.
- Only non-cash payments will be allowed for the purchase of land.
- The selling price of farmland plots shall not be lower than the set normative monetary value. FAS Kyiv note: normative monetary value is identified by the state for the purposes of taxation and renting out of state-owned lands. It should be reviewed at least once in five to seven years. It reflects nominal rent income from a land plot. It varies by region and type of land use (perennial plantations, arable lands, grasslands, etc.) and these numbers are available here ([in Ukrainian](#)).

FAS Kyiv believes that in the long-term, the land market will lead to a gradual transformation of Ukrainian agriculture. Traditional, large scale production of bulk commodities (grains and oilseeds) may slightly decrease, giving way to more diversified production with the emergence of an increase in production of products that require a substantial investment in land. Such products could include horticulture (fruit and nuts), berries, vegetables etc. with the target destination market in the EU.

The emergence of a land market in Ukraine will have a limited impact towards farmers' planting decisions in spring 2020. However, some of them (predominantly small farmers) may increase their oilseed area in order to pocket more funds for the purchase of land in 2021, which they are currently renting.

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.

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 on a "first come – first served" principle between applicants. The import quotas are based on import licenses distributed by MEDTA. According to the WTO notification [G/AG/N/UKR/35](#) by the Government of Ukraine, the 2019 quota for raw cane sugar remained unallocated.

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 will come into force on September 1, 2022.

**Author Defined:
Trade Data**

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

Origin	MY 2016/17 (Oct. 16-Sept. 17)		MY 2017/18 (Oct. 17-Sept. 18)		MY 2018/19 (Oct. 18-Sept. 19)		% Change MY 2018/19 to MY2017/18
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	747,676.0	100.0	553,228.0	100.0	402,942.0	100.0	-27.2
Middle East	170,552.0	22.8	125,999.0	22.8	127,487.0	31.6	1.2
EU 27 Brexit	41,075.0	5.5	3,403.0	0.6	52,518.0	13.0	∞
Eurasian Economic Union	2,577.0	0.4	15,087.0	2.7	45,695.0	11.3	202.9
Africa	293,156.0	39.2	68,201.0	12.3	19,525.0	4.9	-71.4
East and Southeast Asia	43,221.0	5.8	363.0	0.1	371.0	0.1	2.2
South Asia	100,712.0	13.5	38,925.0	7.0	0.0	0.0	-100.0
Uzbekistan	0.0	0.0	214,017.0	38.7	91,967.0	22.8	-57.0
Azerbaijan	30,619.0	4.1	37,918.0	6.9	73,149.0	18.2	92.9
Tajikistan	11,039.0	1.5	14,874.0	2.7	33,967.0	8.4	128.4
Romania	13,813.0	1.9	1,072.0	0.2	21,008.0	5.2	∞
United Kingdom	6,645.0	0.9	30,343.0	5.5	17,631.0	4.4	-41.9
Kyrgyzstan	2,572.0	0.3	0.0	0.0	16,247.0	4.0	0.0
Israel	22,252.0	3.0	3,137.0	0.6	13,929.0	3.5	344.0
Georgia	43,993.0	5.9	17,358.0	3.1	13,889.0	3.5	-20.0
Libya	42,500.0	5.7	39,351.0	7.1	13,700.0	3.4	-65.2
Moldova	10,537.0	1.4	15,892.0	2.9	11,626.0	2.9	-26.8
Russia	1.0	0.0	1.0	0.0	10,493.0	2.6	∞
Armenia	0.0	0.0	15,082.0	2.7	10,248.0	2.5	-32.1
Spain	9,000.0	1.2	92.0	0.0	8,989.0	2.2	∞
Turkey	49,598.0	6.6	46,755.0	8.5	8,966.0	2.2	-80.8
Kazakhstan	0.0	0.0	0.0	0.0	6,897.0	1.7	∞
Lithuania	105.0	0.0	0.0	0.0	6,174.0	1.5	∞
Italy	99.0	0.0	0.0	0.0	5,980.0	1.5	0.0
Switzerland	18,629.0	2.5	23,911.0	4.3	5,972.0	1.5	-75.0
Saudi Arabia	6,240.0	0.8	260.0	0.1	5,720.0	1.4	∞
Bulgaria	0.0	0.0	0.0	0.0	4,592.0	1.1	∞
Turkmenistan	8,194.0	1.1	14,269.0	2.6	4,402.0	1.1	-69.2
Poland	4,959.0	0.7	440.0	0.1	3,422.0	0.9	677.2
Montenegro	11,984.0	1.6	2,265.0	0.4	827.0	0.2	-63.5
Greece	11,244.0	1.5	0.0	0.0	781.0	0.2	∞
Cyprus	1,716.0	0.2	728.0	0.1	676.0	0.2	-7.1
Togo	25,000.0	3.3	0.0	0.0	520.0	0.1	0.0
Myanmar	33,652.0	4.5	0.0	0.0	0.0	0.0	0.0
Lebanon	8,381.0	1.1	3,900.0	0.7	0.0	0.0	-100.0
Mauritania	16,500.0	2.2	0.0	0.0	0.0	0.0	0.0
Albania	21,924.0	2.9	260.0	0.1	0.0	0.0	-100.0
Sudan	40,368.0	5.4	13,883.0	2.5	0.0	0.0	-100.0
Egypt	30,650.0	4.1	0.0	0.0	0.0	0.0	-66.7
Somalia	24,190.0	3.2	9,194.0	1.7	0.0	0.0	-100.0
Sri Lanka	100,712.0	13.5	38,925.0	7.0	0.0	0.0	-100.0
Cote d'Ivoire	34,520.0	4.6	0.0	0.0	0.0	0.0	0.0
Ethiopia	3,900.0	0.5	0.0	0.0	0.0	0.0	0.0
Tunisia	33,740.0	4.5	0.0	0.0	0.0	0.0	0.0
South Africa	6,058.0	0.8	2,132.0	0.4	0.0	0.0	-100.0
Guinea	25,000.0	3.3	0.0	0.0	0.0	0.0	0.0
Other	37,338.0	0.0	7,166.0	0.0	11,169.0	0.0	55.86

Source: Trade Data Monitor, LLC

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

Origin	Subtotal Oct 2018- Feb 2019	MY 2018/19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Subtotal Oct 2019- Feb 2020	% Change Oct 2019-Feb 2020 to Oct 2018-Feb 2019
World	259,386	402,943	6,787	3,177	6,892	17,290	8,443	42,589	-83.58
EU 27 Brexit	49,223	52,518	0	500	5,108	11,504	332	17,444	-64.56
Middle East	57,555	127,488	1,115	136	143	159	6,901	8,454	-85.31
Eurasian Economic Union	22,661	45,697	3,262	1,487	542	16	18	5,325	-76.50
East and Southeast Asia	25	370	154	0	0	0	48	202	708.00
Africa	8,780	19,523	0	0	0	0	0	0	-100.00
Romania	19,996	21,008	0	0	4,475	4,706	322	9,503	-52.48
Russia	3,709	10,495	3,179	1,351	407	1	0	4,938	33.14
United Kingdom	14,042	17,630	0	416	988	4,885	520	6,809	-51.51
Poland	3,422	3,422	0	0	633	6,078	10	6,721	96.41
Lebanon	0	0	0	0	0	0	5,460	5,460	∞
Moldova	6,037	11,627	1,509	772	246	727	96	3,350	-44.51
Uzbekistan	80,394	91,967	813	0	0	0	0	813	-98.99
Georgia	2,289	13,889	1,020	1	6	2	9	1,038	-54.65
Turkey	1,794	8,965	0	0	0	0	1,040	1,040	-42.03
Germany	0	310	0	500	0	0	0	500	∞
Israel	6,040	13,930	0	0	0	156	312	468	-92.25
Armenia	4,337	10,248	68	136	136	0	0	340	-92.16
Tajikistan	15,645	33,967	0	0	0	0	0	0	-100.00
Azerbaijan	39,455	73,151	1	0	1	0	2	4	-99.99
Kyrgyzstan	13,877	16,247	0	0	0	0	0	0	-100.00
Libya	6,700	13,700	0	0	0	0	0	0	-100.00
Spain	8,943	8,989	0	0	0	0	0	0	-100.00
Lithuania	5,323	6,174	0	0	0	0	0	0	-100.00
Italy	5,980	5,980	0	0	0	0	0	0	-100.00
Switzerland	5,972	5,972	0	0	0	0	0	0	-100.00
Other	15,429	35,267	196	0	0	734	671	1,601	-89.62

Source: Trade Data Monitor, LLC

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

Origin	MY 2016/17 (Oct. 16-Sept. 17)		MY 2017/18 (Oct. 17-Sept. 18)		MY 2018/19 (Oct. 18-Sept. 19)		% Change MY 2018/19 to MY2017/18
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	1,617	100	1,452	100	1,410	100	-3
EU 27 Brexit	857	53	858	59	1,004	71	17
Africa	12	1	22	1	25	2	18
Middle East	29	2	1	0	4	0	209
East and Southeast Asia	0	0	0	0	2	0	573
Eurasian Economic Union	4	0	3	0	0	0	-100
South Asia	0	0	0	0	0	0	0
Denmark	340	21	360	25	380	27	6
United States	642	40	491	34	309	22	-37
France	71	4	105	7	149	11	41
Germany	193	12	206	14	131	9	-37
Poland	66	4	18	1	126	9	585
Sweden	75	5	43	3	72	5	69
Netherlands	56	3	64	4	60	4	-5
Romania	45	3	48	3	56	4	17
Switzerland	52	3	63	4	45	3	-28
Mauritius	12	1	20	1	22	2	11
Finland	1	0	5	0	14	1	164
United Kingdom	1	0	3	0	10	1	203
Brazil	20	1	10	1	10	1	0
Austria	5	0	6	0	8	1	35
Turkey	0	0	1	0	4	0	173
Mozambique	0	0	1	0	3	0	122
Croatia	0	0	0	0	3	0	992
Czech Republic	0	0	2	0	2	0	34
Italy	0	0	1	0	1	0	47
Cambodia	0	0	0	0	1	0	0
Belgium	2	0	0	0	1	0	230
China	0	0	0	0	1	0	166
Canada	0	0	1	0	0	0	-100
Spain	0	0	0	0	0	0	0
Madagascar	0	0	0	0	0	0	-100
Paraguay	0	0	0	0	0	0	0
India	0	0	0	0	0	0	0
Hungary	2	0	0	0	0	0	0
Slovakia	0	0	0	0	0	0	0
Estonia	0	0	0	0	0	0	291
Belarus	4	0	3	0	0	0	-100
Israel	29	2	0	0	0	0	0
Swaziland	0	0	0	0	0	0	0
Vietnam	0	0	0	0	0	0	0

Source: Trade Data Monitor, LLC

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

Origin	Subtotal Oct 2018- Feb 2019	MY 2018/19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Subtotal Oct 2019- Feb 2020	% Change Oct 2019-Feb 2020 to Oct 2018-Feb 2019
World	694	1,410	145	110	201	96	121	673	-3.03
EU 27 Brexit	445	1,004	119	81	147	57	98	502	12.81
Africa	9	26	0	0	6	0	0	6	-33.33
Middle East	2	5	0	0	0	0	0	0	-100.00
East and Southeast Asia	0	1	0	1	0	0	0	1	∞
Denmark	140	380	60	40	20	40	40	200	42.86
United States	190	309	26	27	27	29	1	110	-42.11
France	81	148	25	15	37	3	30	110	35.80
Germany	75	131	15	4	61	5	7	92	22.67
Poland	55	126	6	11	18	0	8	43	-21.82
Switzerland	45	45	0	0	21	1	21	43	-4.44
Romania	24	56	6	5	7	4	8	30	25.00
Sweden	28	72	0	0	0	0	0	0	-100.00
Netherlands	28	60	0	0	1	1	0	2	-92.86
Finland	7	14	5	4	0	3	3	15	114.29
Mauritius	7	23	0	0	6	0	0	6	-14.29
United Kingdom	3	10	0	0	0	8	0	8	166.67
Austria	2	7	1	1	1	0	1	4	100.00
Brazil	0	10	0	0	0	0	0	0	∞
Croatia	0	3	0	0	1	0	0	1	∞
Turkey	2	4	0	0	0	0	0	0	-100.00
Italy	0	2	0	1	0	0	0	1	∞
Mozambique	2	3	0	0	0	0	0	0	-100.00
Cambodia	0	1	0	1	0	0	0	1	∞
Belgium	0	0	0	0	0	1	0	1	∞
Czech Republic	1	1	0	0	0	0	0	0	-100.00

Source: Trade Data Monitor, LLC

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

Origin	MY 2016/17 (Oct. 16-Sept. 17)		MY 2017/18 (Oct. 17-Sept. 18)		MY 2018/19 (Oct. 18-Sept. 19)		% Change MY 2018/19 to MY2017/18
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	6.0	100.0	1,250.0	100.0	5,147.0	100.0	311.6
Middle East	0.0	0.3	1,040.0	83.2	2,237.0	43.5	115.1
Eurasian Economic Union	0.0	0.3	0.0	0.0	543.0	10.6	0.0
Africa	0.0	0.8	0.0	0.0	0.0	0.0	13.3
East and Southeast Asia	0.0	0.2	0.0	0.0	0.0	0.0	-65.3
EU 27 Brexit	0.0	2.9	208.0	16.7	0.0	0.0	-100.0
Azerbaijan	0.0	0.0	0.0	0.0	2,101.0	40.8	0.0
Tajikistan	0.0	0.0	0.0	0.0	1,896.0	36.8	0.0
Kyrgyzstan	0.0	0.0	0.0	0.0	543.0	10.6	0.0
Uzbekistan	0.0	0.0	0.0	0.0	471.0	9.2	0.0
Georgia	0.0	0.0	520.0	41.6	136.0	2.6	-73.9
Panama	0.0	0.0	0.0	0.0	0.0	0.0	-73.9
Israel	0.0	0.0	520.0	41.6	0.0	0.0	-100.0
Cyprus	0.0	1.1	208.0	16.6	0.0	0.0	-100.0
Bahamas	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Singapore	0.0	0.0	0.0	0.0	0.0	0.0	-61.5
Italy	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Norway	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Dominica	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Switzerland	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Turkey	0.0	0.3	0.0	0.0	0.0	0.0	0.0
Liberia	0.0	0.4	0.0	0.0	0.0	0.0	-60.0
Turkmenistan	6.0	93.5	0.0	0.0	0.0	0.0	0.0
Germany	0.0	0.0	0.0	0.0	0.0	0.0	-50.0
Malta	0.0	1.6	0.0	0.0	0.0	0.0	400.0
Comoros	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Belize	0.0	0.8	0.0	0.0	0.0	0.0	-100.0
Moldova	0.0	0.0	2.0	0.2	0.0	0.0	-100.0
Antigua and Barbuda	0.0	0.0	0.0	0.0	0.0	0.0	0.0
China	0.0	0.0	0.0	0.0	0.0	0.0	0.0
United Kingdom	0.0	0.4	0.0	0.0	0.0	0.0	-100.0
Tanzania	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sierra Leone	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gibraltar	0.0	0.2	0.0	0.0	0.0	0.0	0.0
Philippines	0.0	0.0	0.0	0.0	0.0	0.0	-100.0
Russia	0.0	0.3	0.0	0.0	0.0	0.0	0.0
Hong Kong	0.0	0.2	0.0	0.0	0.0	0.0	-58.3

Source: Trade Data Monitor, LLC

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

Origin	Subtotal Oct 2018- Feb 2019	MY 2018/19	Oct-19	Nov-19	Dec-19	Jan-20	Feb-20	Subtotal Oct 2019- Feb 2020	% Change Oct 2019-Feb 2020 to Oct 2018-Feb 2019
World	4,131	5,147	0	0	3	22	0	25	-99.39
EU 27 Brexit	0	0	0	0	0	22	0	22	∞
Eurasian Economic Union	543	543	0	0	0	0	0	0	-100.00
Middle East	1,221	2,237	0	0	0	0	0	0	-100.00
Azerbaijan	1,085	2,101	0	0	0	0	0	0	-100.00
Georgia	136	136	0	0	0	0	0	0	-100.00
Kyrgyzstan	543	543	0	0	0	0	0	0	-100.00
Latvia	0	0	0	0	0	22	0	22	∞
Moldova	0	0	0	0	3	0	0	3	∞
Tajikistan	1,896	1,896	0	0	0	0	0	0	-100.00
Uzbekistan	472	472	0	0	0	0	0	0	-100.00

Source: Trade Data Monitor, LLC

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

Origin	MY 2016/17 (Oct. 16-Sept. 17)		MY 2017/18 (Oct. 17-Sept. 18)		MY 2018/19 (Oct. 18-Sept. 19)		% Change MY 2018/19 to MY2017/18
	Quantity	% Share	Quantity	% Share	Quantity	% Share	
World	251.0	100.0	233.0	100.0	401.0	100.0	72.2
Africa	160.0	63.8	186.0	79.6	304.0	75.8	63.8
Middle East	0.0	0.0	0.0	0.0	37.0	9.1	0.0
EU 27 Brexit	16.0	6.6	7.0	3.1	37.0	9.2	419.5
East and Southeast Asia	16.0	6.5	21.0	9.2	1.0	0.2	-95.6
South Asia	1.0	0.3	1.0	0.4	0.0	0.0	-92.7
Mauritius	160.0	63.8	184.0	79.1	304.0	75.8	65.0
Israel	0.0	0.0	0.0	0.0	37.0	9.1	0.0
Germany	11.0	4.3	2.0	1.0	21.0	5.3	780.5
United Kingdom	9.0	3.6	17.0	7.3	14.0	3.5	-17.7
Colombia	42.0	16.7	0.0	0.1	7.0	1.8	5,091.1
Netherlands	0.0	0.0	0.0	0.0	5.0	1.3	0.0
Slovakia	3.0	1.1	1.0	0.4	4.0	0.9	300.0
Austria	0.0	0.0	2.0	0.8	4.0	1.0	135.8
Italy	0.0	0.0	0.0	0.0	3.0	0.8	15,003.8
Switzerland	3.0	1.2	0.0	0.0	1.0	0.2	0.0
Thailand	16.0	6.4	21.0	9.1	1.0	0.2	-96.9
Spain	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Belgium	3.0	1.2	2.0	0.8	0.0	0.0	-99.9
Philippines	0.0	0.1	0.0	0.1	0.0	0.0	-19.1
Cuba	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Mexico	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Poland	0.0	0.0	0.0	0.1	0.0	0.0	-95.5
Costa Rica	0.0	0.0	0.0	0.0	0.0	0.0	16.6
Paraguay	0.0	0.1	1.0	0.4	0.0	0.1	-56.3
Argentina	3.0	1.2	0.0	0.0	0.0	0.0	0.0
India	1.0	0.3	1.0	0.4	0.0	0.0	-92.7
France	0.0	0.0	0.0	0.0	0.0	0.0	-88.5
Sri Lanka	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Reunion	0.0	0.0	1.0	0.6	0.0	0.0	-100.0
Vietnam	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Trade Data Monitor, LLC

Attachments:

No Attachments