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# Report Name: Sugar Annual

**Country:** Ukraine

**Post:** Kyiv

**Report Category:** Sugar

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**Report Highlights:**

Marketing Year (MY) 2021/22 sugar production is forecast at around 1.4 million metric tons, a 23 percent increase compared to the MY2020/21 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. To stay afloat, sugar producers are working on increasing the quality of sugar produced, as well as putting more effort into diversification and cost-cutting.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

**Commodities:**
Sugar Beets

**Production:**

According to data from the State Statistic Service of Ukraine (SSSU), over 90 percent of the sugar beet production area is owned or operated by agricultural enterprises. According to industry sources, a most of these enterprises are large, vertically integrated agricultural businesses called agro-holdings, which are 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 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 transporting sugar beets prevents shipments to competitive processors located in neighboring regions.

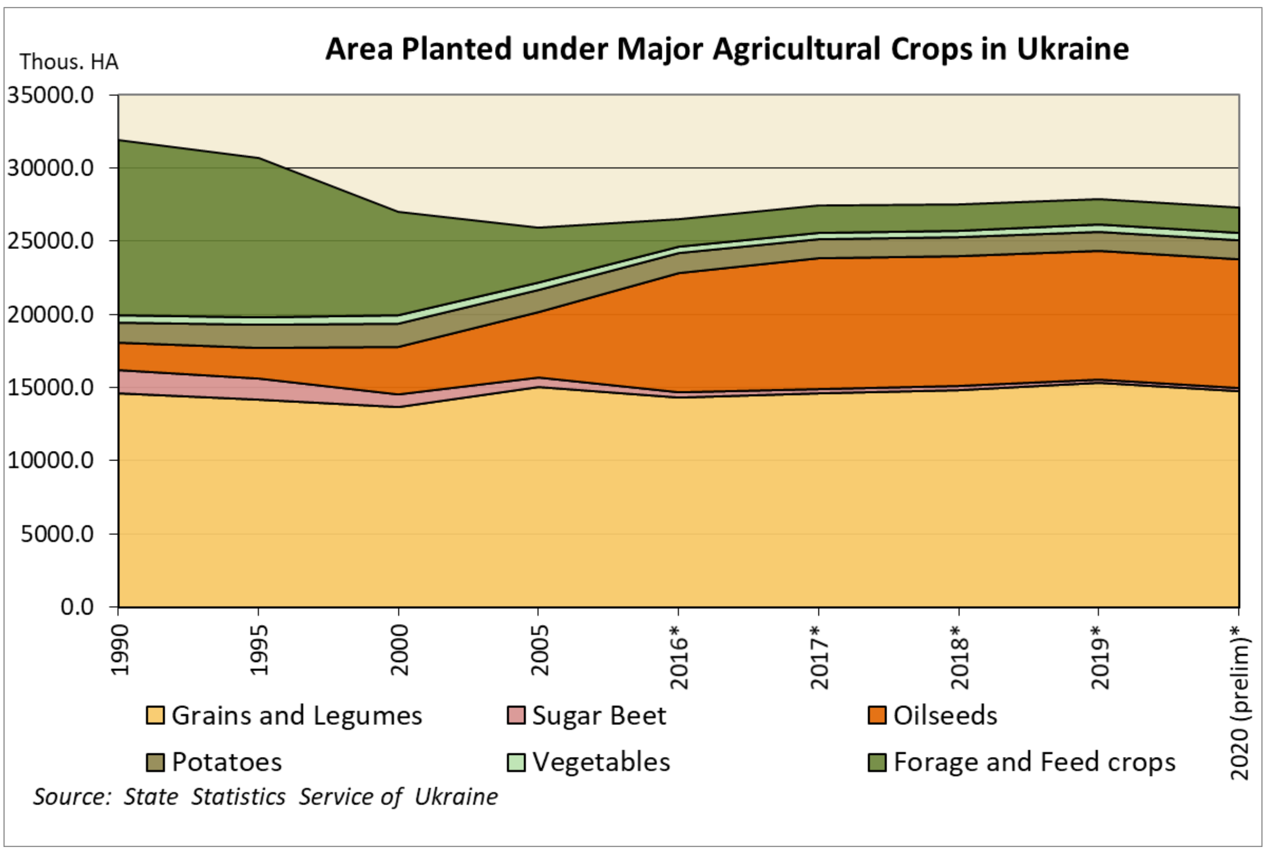
**Profitability and Area Planted under Major Agricultural Crops in Ukraine**
**(thousand hectares, %, Calendar Years)**

| | 1995 | 2000 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020* |
|---|---|---|---|---|---|---|---|---|
| Grains & Pulses Area | 14,152 | 13,646 | 14,728 | 14,349 | 14,602 | 14,839 | 15,318 | 14,759 |
| Grains & Pulses Prof. | 86% | 65% | 43% | 38% | 25% | 25% | 12% | - |
| Soybean Area | 25 | 65 | 2,147 | 1,846 | 1,997 | 1,716 | 1,609 | 1,323 |
| Soybean Prof. | - | - | 39% | 52% | 29% | 21% | 13% | - |
| Sunflower Area | 2,020 | 2,943 | 4,965 | 5,904 | 6,020 | 6,117 | 5,928 | 6,381 |
| Sunflower Seed Prof. | 171% | 52% | 81% | 63% | 41% | 33% | 24% | - |
| Rapeseed Area | 49 | 214 | 684 | 456 | 788 | 1,042 | 1,282 | 1,105 |
| Rapeseed Prof. | - | - | 44% | 45% | 44% | 31% | 9% | - |
| Sugar Beets Area | 1,475 | 856 | 239 | 292 | 316 | 276 | 222 | 202 |
| Sugar Beets Prof. | 31% | 6% | 28% | 24% | 12% | -11% | -15% | - |

*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 2019 was the second year in a row in which sugar beet growers experienced negative profitability. 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 2020 was negative as well, however, official data has not yet been released. Negative profitability effectively means the end of sugar beet production by small and medium farmers, but not for agro-holdings. Large agro-holdings can use their own sugar processing plants and related businesses (e.g., confectionary) to redistribute utilize 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.

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).

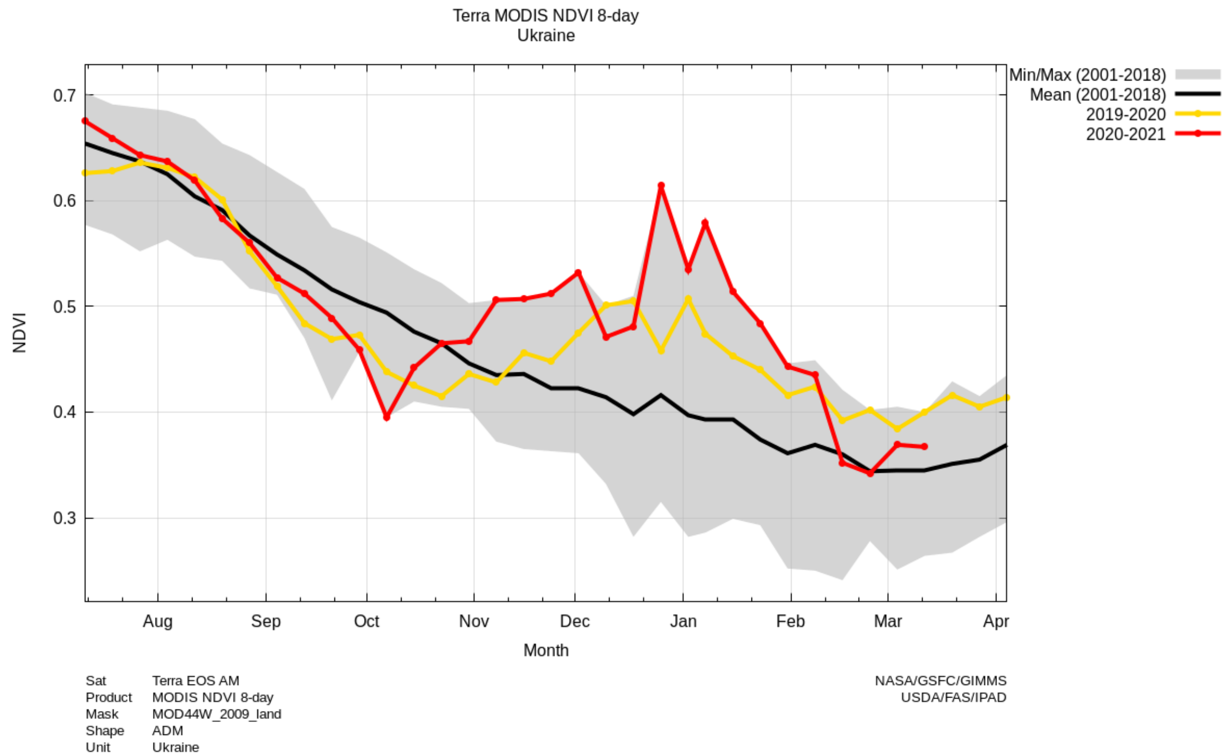


According to the SSSU's preliminary data, MY2020/21 sugar beet harvested area was 202 thousand ha, around a nine percent decrease compared to the previous marketing year. As a result of the decrease in production area, as well as a decrease in yields due to unfavorable climatic conditions in 2020 (please refer to Production section our GAIN Report UP2020-0031 for more information), MY2020/21 sugar beet production volume dropped to 8.2 million metric tons (MMT). This is a 19 percent decrease from the previous marketing year.

Sugar producers indicate that climate change has brought higher temperatures and a subsequent lack of moisture in Northern and North-Western Ukraine (Vinnytsya, Volyn, Lviv, Poltava, Ternopil, Kharkiv, Khmelnytskiy and Chernihiv regions). These regions produce over 85 percent of the Ukrainian sugar beet production volume. According to local media reports, companies are experimenting with available hybrids and growing technologies to mitigate weather changes. Some processors have reportedly sold their processing facilities in the regions that are no longer favorable for sugar beet production.

FAS Kyiv forecasts MY2021/22 production area at 218 thousand ha, an eight percent increase compared to the previous MY. This increase of production area will be driven by the need by large local sugar beet growers/processors to source enough raw material to keep their processing facilities running and produce enough sugar to satisfy the demand of the local market for MY2021/22. Should they fail to do it, the local food industry might start lobbying for a lower import quota (please refer to Policy section) in order to start importing sugar. Additionally, lower MY2020/21 sugar production results in higher sugar prices (please refer to Trade section) that allow producers to sell their accumulated stocks, thus increasing their interest in planting more sugar beets in 2021.

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. At the beginning of March 2021, NDVI was at the 2020 level and slightly better than the average for the period 2001 to 2018. Based on these conditions, FAS Kyiv forecasts 2021 sugar beet yields at the five-year average level.




Based on the abovementioned area and yield assumptions, FAS Kyiv forecasts the MY2021/22 sugar beet production volume at 10.2 MMT, 23 percent higher than Post's MY2020/21 production estimate (8.2 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 MY2020/21 estimated harvested area is three percent lower than the official USDA data, based on the available SSSU data.

Post's MY2020/21 estimated production volume is 17 percent lower than official USDA data, based on available SSSU data.

Post's MY2020/21 estimated utilization for sugar volume is 17 percent lower than official USDA data, based on MY2020/21 production estimate.

| **Sugar Beets** | **2019/2020** | | **2020/2021** | | **2021/2022** | |
|---|---|---|---|---|---|---|
| **Market Year Begins** | **Sep 2020** | | **Sep 2021** | | **Sep 2022** | |
| **Ukraine** | **USDA Official** | **New Post** | **USDA Official** | **New Post** | **USDA Official** | **New Post** |
| **Area Planted** (1000 HA) | 222 | 222 | 210 | 210 | 0 | 220 |
| **Area Harvested** (1000 HA) | 221 | 221 | 209 | 202 | 0 | 218 |
| **Production** (1000 MT) | 10205 | 10205 | 9886 | 8257 | 0 | 10187 |
| **Total Supply** (1000 MT) | 10205 | 10205 | 9886 | 8257 | 0 | 10187 |
| **Utilization for Sugar** (1000 MT) | 10205 | 10205 | 9886 | 8257 | 0 | 10187 |
| **Utilizatn for Alcohol** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Distribution** (1000 MT) | 10205 | 10205 | 9886 | 8257 | 0 | 10187 |
| | | | | | | |
| (1000 HA) ,(1000 MT) | | | | | | |

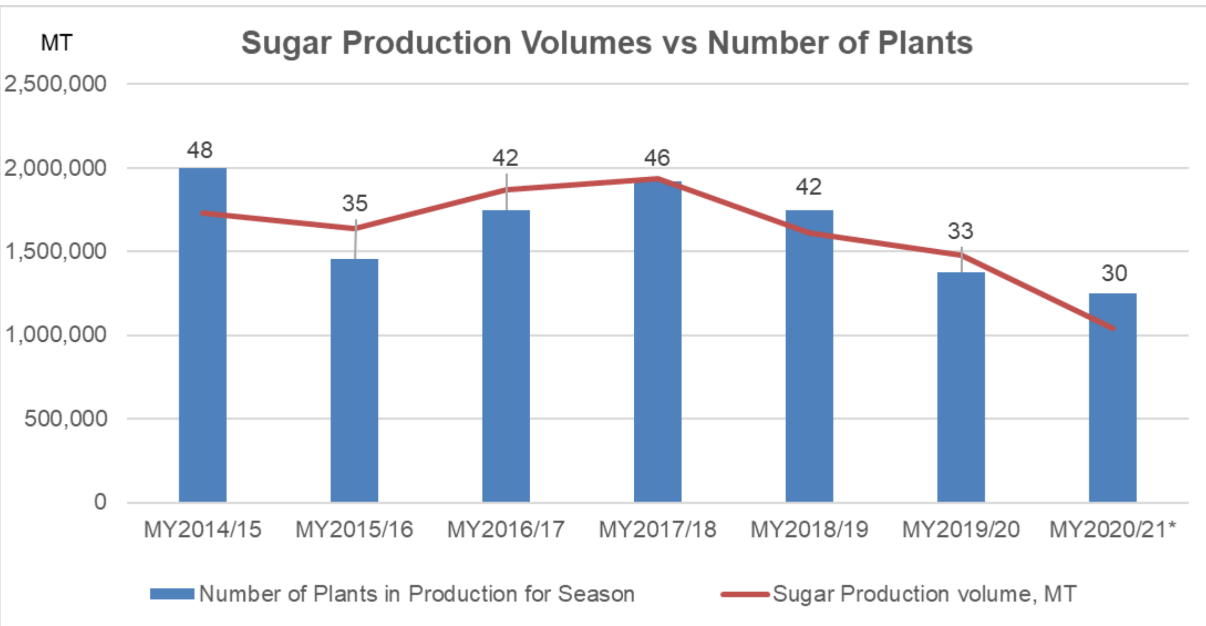
**Commodities:**
Sugar, Centrifugal

**Production:**

The Ukrainian National Association of Sugar Producers, "UkrSugar," reported sugar production at 1.02 MMT for local MY2020/21 (starts September), a 31 percent decrease compared to the previous marketing year. FAS Kyiv's initial estimate for MY 2020/21 sugar production is 1.1 MMT (note that FAS estimates are done in raw value basis, please refer to the PSD Table below for more details).

MY2021/22 sugar production is forecast at around 1.4 MMT, a 23 percent increase compared to the MY2020/21 estimate, based on the forecast sugar beet production volume discussed in the relevant section above.

Competitive international markets, as well as the 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.

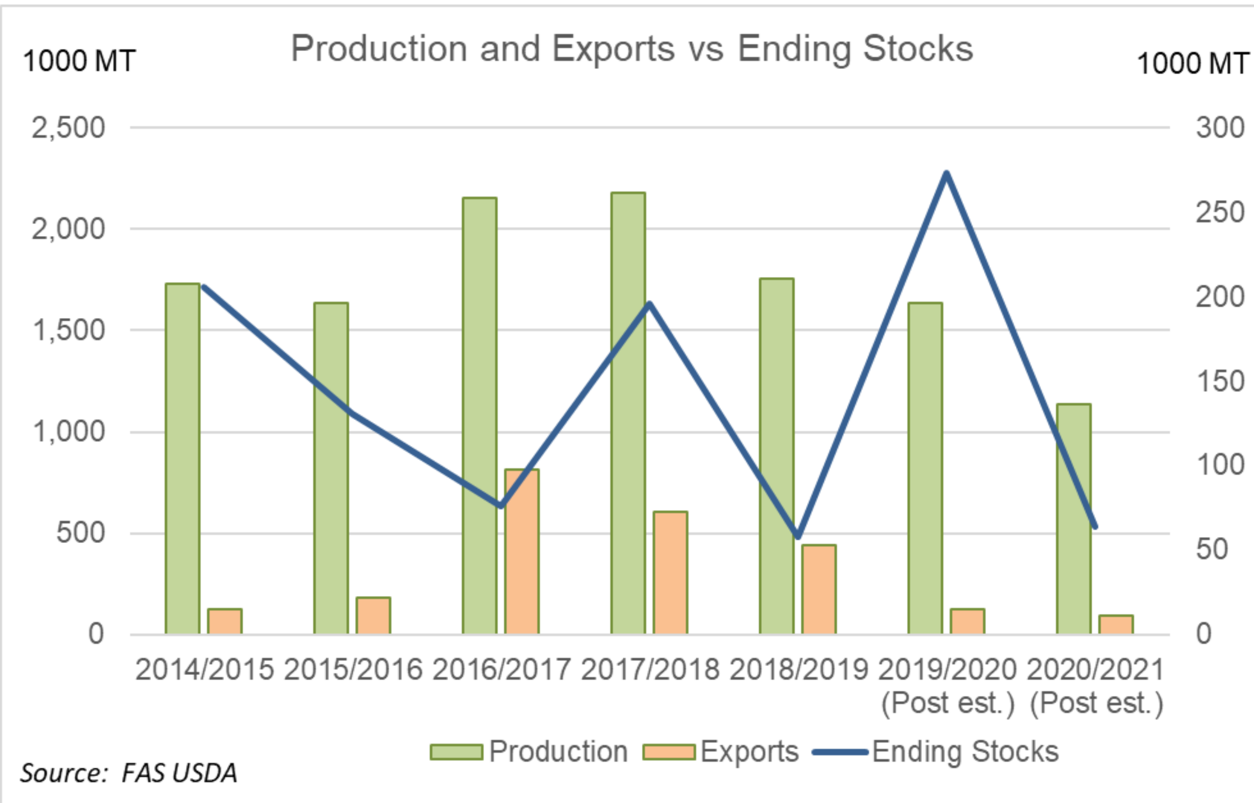


*Source: State Statistics Service of Ukraine and Ukrsugar*
** - Ukrsugar's estimate for sugar production volume*

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 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, MY2019/20 ending stocks were 4.7-fold higher compared to the previous marketing year (please refer to Production and Exports vs Ending Stocks graph below) due to lower MY2019/20 export volumes that may have been associated with the decrease in international sugar demand/prices during that period (please refer to the relevant graph in the Trade section). On the other hand, Post estimates that MY2020/21 ending stocks will decrease to  roughly the MY2018/19 level, taking into account the MY2020/21 rate of exports (please refer to relevant section for more details).

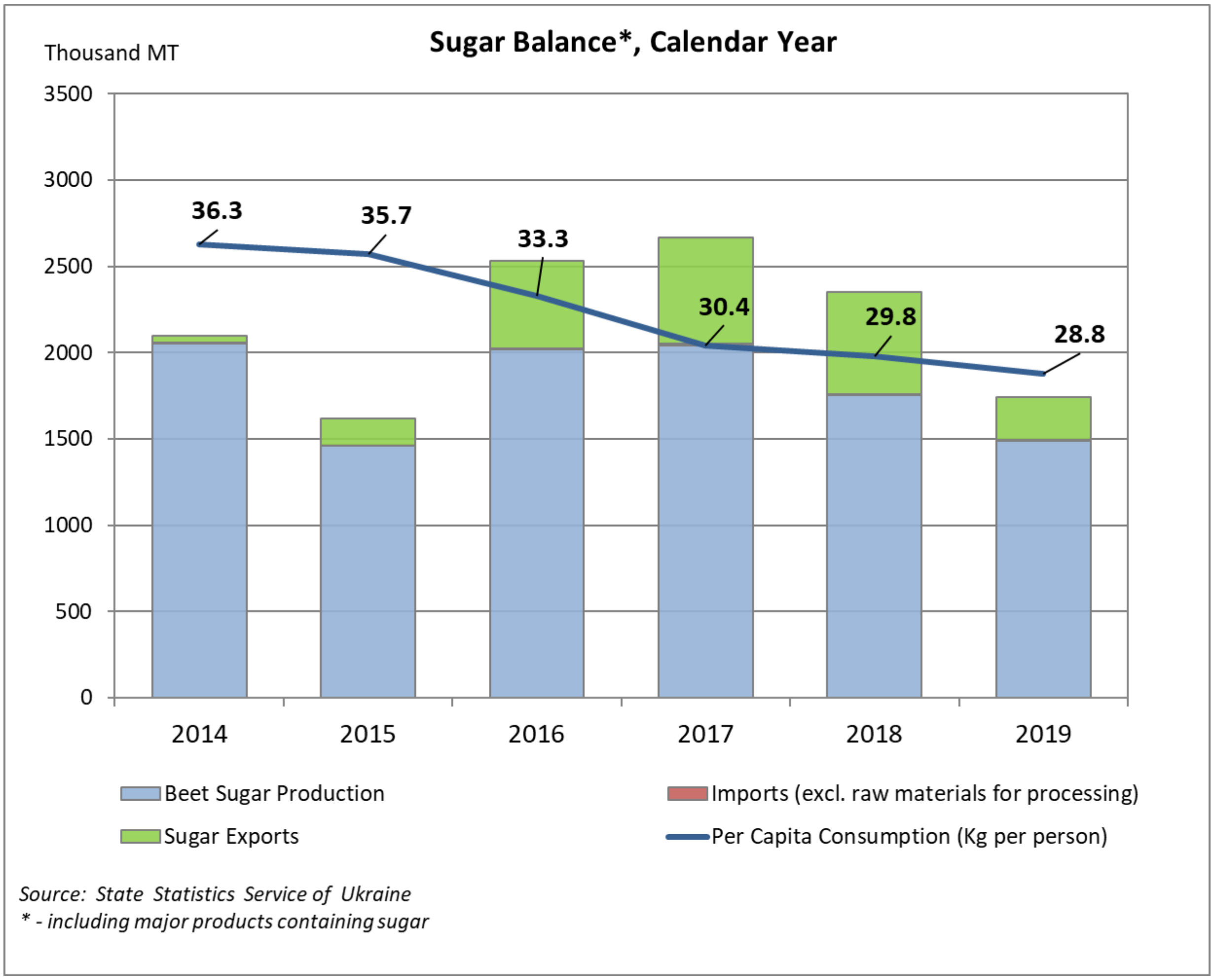



Sugar stocks are predominantly held by sugar producers and wholesalers.

**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.

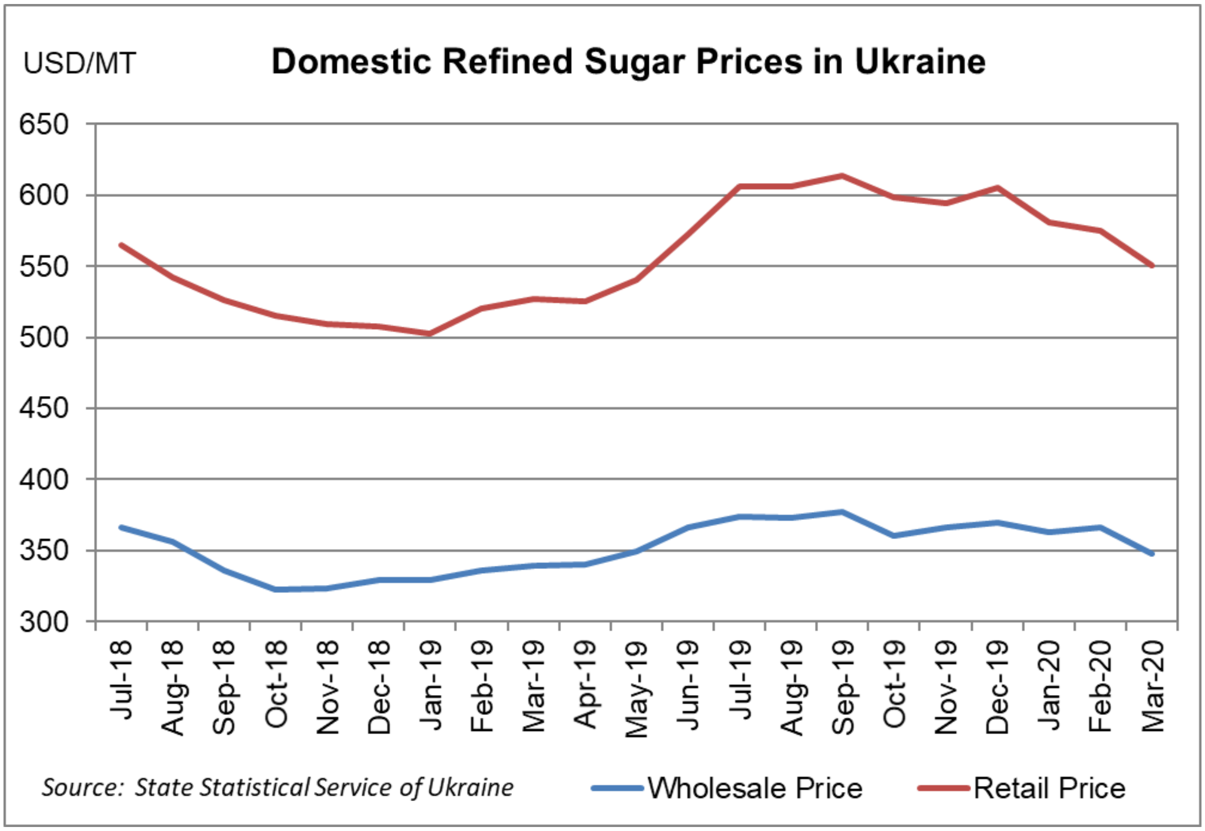
This trend of decreasing domestic sugar consumption has been confirmed by SSSU data, which indicates that per capita sugar consumption in Ukraine is gradually decreasing (please refer to Sugar Balance graph below).




The major products that utilize sugar include bakery, condensed milk and confectionary products. According to SSSU's data, production volumes for all these products decreased during 2020. At the same time, Ukrainian imports of high-intensity sweeteners (in sugar equivalent) for MY2019/20 stayed roughly the same as for MY2018/19 (please refer to Trade Section for more details) and had no impact on domestic sugar consumption in Ukraine.

According to UkrSugar's data, annual domestic sugar consumption is estimated at1.2 MMT for 2020 and Post accepts this number as the estimate for domestic consumption for both MY2020/21 and MY2021/22. Post's assumption remains valid unless: there are significant changes in domestic economic policies 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 MY2019/20 and early MY2020/21, 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 exchange rate variations. However, both retail and wholesale prices were on an upward trend at the beginning of summer 2020. This upward trend could be associated with both individual and food processor production of jams from fresh fruit widely available during the summer period.




Given the decrease in both production of sugar and the domestic consumption of sugar, Post has decreased other disappearances in the relevant PSD table for three consecutive marketing years in a row: from 2019/20 through MY2021/22.

**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).

Ukraine's exports of refined sugar in MY2019/20 were 115 thousand metric tons (TMT), a 71 percent decrease compared to the previous marketing year. This decrease in exports may be associated with both the decrease in production volume (please refer to the relevant section) and the dynamics of international prices that were at their lowest in MY2019/20 (please refer to London Sugar Futures graph below for more details). The mentioned decrease in Ukrainian exports resulted in an accumulation of higher-than-usual stocks (please refer to the Stocks Section for more details).


The major export markets for Ukraine's refined sugar exports in MY2019/20 included: Turkey – 25 TMT; the EU – 20 TMT; the Gaza Strip and the West Bank, Lebanon, and Libya – each with 8 TMT. It should be noted that exports to the EU are supported by a 20 TMT Tariff Rate Quota (TRQ) offered to Ukraine by the EU under the Deep and Comprehensive Free Trade Area Agreement (DCFTA).

Refined sugar exports hiked up to over 52 TMT at the beginning of MY2020/21 (October – December 2020), a three-fold increase over the same period of the previous year. The major destinations behind this growth were: Uzbekistan – 13 TMT; Tajikistan – 8 TMT; Armenia and Azerbaijan – 7 TMT each.

Ukraine's exports of raw sugar were non-existent in both MY2019/20 and the first three months of MY2020/21. This may have been an indication that sugar processors were more interested in the production and export of deep-processed products during a time of low prices and low production volumes, in an attempt to support revenues.

Based on the above-mentioned trade data, as well as the MY2020/21 sugar production estimates, Post estimates MY2020/21 sugar exports will drop to 95 TMT, a 24 percent decrease compared to the previous marketing year estimate. MY2021/22 sugar export forecast is 115 TMT, a 63 percent increase compared to Post's MY2020/21 estimate.

Ukraine's MY2019/20 imports of refined sugar were the same as the imports in the previous MY – around 1.4 TMT. These imports were predominantly premium-class products, mostly imported from Denmark (460 metric tons (MT)), France (263 MT) and the United States (229 MT). Import volumes for this product have remained relatively stable over the last three years. Trade data during the period October-December 2020 suggest that the volume of Ukraine's in imports will likely follow the same trend into MY2020/21.

MY2019/20 imports of raw sugar were 320 MT, despite the application of an import tariff quota for raw cane sugar (please refer to Policy Section for more details). According to industry sources, due to technological advances in both sugar beet production and processing in Ukraine imports of raw sugar are no longer economically feasible. These advances have resulted in a decrease in Ukrainian cost of production (please refer to Production Section for more details).

Based on available import trends, FAS Kyiv sets refined sugar imports at two TMT both for MY2020/21 and MY2021/22.

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 MY2019/20 (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 between 410 and 450 TMT of beet sugar for MY2019/20. 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 2019/20 to MY2018/19 |
| | | | MY 2017/18 (Oct 17-Sept 18) | MY 2018/19 (Oct 18-Sept 19) | MY 2019/20 (Oct 19-Sept 20) | |
| 130219 | Vegetable Saps And Extracts, Nesoi | MT | 108 | 101 | 96 | 95.05 |
| | | Mln. USD | 4.42 | 5.31 | 4.63 | 87.20 |
| 1702 | Sugars Nesoi, Incl Chem Pure Lactose Etc; Caramel | MT | 25,930 | 15,048 | 15,688 | 104.25 |
| | | Mln. USD | 15.67 | 12.64 | 13.38 | 105.90 |
| 292429 | Cyclic Amides, Derivatives And Salts Of, Nesoi | MT | 728 | 1,109 | 953 | 85.93 |
| | | Mln. USD | 12.18 | 13.23 | 11.37 | 85.97 |
| 292511 | Saccharin And Its Salts | MT | 22 | 23 | 59 | 256.52 |
| | | Mln. USD | 0.21 | 0.19 | 0.44 | 230.63 |
| 292990 | Compounds Nesoi With Nitrogen Function Nesoi | MT | 67 | 100 | 75 | 75.00 |
| | | Mln. USD | 0.72 | 0.72 | 0.27 | 37.42 |
| 293219 | Cmpds Cont An Unfused Furan Ring Etc Nesoi | MT | 47 | 41 | 24 | 58.54 |
| | | Mln. USD | 1.91 | 1.68 | 0.91 | 54.05 |
| 293499 | Nucleic Acids & Salts; Other Heterocyclic Cmp, Nes | MT | 256 | 308 | 265 | 86.04 |
| | | Mln. USD | 29.05 | 24.30 | 26.31 | 108.27 |
| 294200 | Organic Compounds Nesoi | MT | 16 | 5 | 8 | 160.00 |
| | | Mln. USD | 0.12 | 0.24 | 0.68 | 281.31 |
| | Total Estimated Sugar Equvalent for Imported Sweeteners* | MT | 465,530 | 432,548 | 421,088 | 97.35 |

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

**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 27 percent lower than the official USDA estimate based on SSSU’s data.

Post’s MY2020/21 refined export estimate is 49 percent lower than USDA’s official estimate based on trade dynamics.

Post’s MY2019/20 and MY2020/21 human domestic consumption estimates are six and eight percent lower, respectively, than the official USDA estimates, based on factors discussed in the Consumption section of this report.

Post’s MY2019/20 and MY2020/21 other disappearance estimates are both 38 percent lower than the official USDA estimates, based on factors discussed in the Consumption section of this report.

Post’s MY2019/20 and MY2020/21 ending stocks estimates are two-fold higher and 50 percent lower, respectively, than the official USDA estimates, based on factors discussed in the Stocks section of this report.

| Sugar, Centrifugal | 2019/2020 | | 2020/2021 | | 2021/2022 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Oct 2020 | | Oct 2020 | | Oct 2021 | |
| Ukraine | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Beginning Stocks** (1000 MT) | 58 | 58 | 133 | 273 | 0 | 64 |
| **Beet Sugar Production** (1000 MT) | 1609 | 1638 | 1559 | 1134 | 0 | 1399 |
| **Cane Sugar Production** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Sugar Production** (1000 MT) | 1609 | 1638 | 1559 | 1134 | 0 | 1399 |
| **Raw Imports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Refined Imp.(Raw Val)** (1000 MT) | 2 | 2 | 2 | 2 | 0 | 2 |
| **Total Imports** (1000 MT) | 2 | 2 | 2 | 2 | 0 | 2 |
| **Total Supply** (1000 MT) | 1669 | 1698 | 1694 | 1409 | 0 | 1465 |
| **Raw Exports** (1000 MT) | 1 | 0 | 1 | 0 | 0 | 0 |
| **Refined Exp.(Raw Val)** (1000 MT) | 125 | 125 | 185 | 95 | 0 | 155 |
| **Total Exports** (1000 MT) | 126 | 125 | 186 | 95 | 0 | 155 |
| **Human Dom. Consumption** (1000 MT) | 1330 | 1250 | 1300 | 1200 | 0 | 1200 |
| **Other Disappearance** (1000 MT) | 80 | 50 | 80 | 50 | 0 | 50 |
| **Total Use** (1000 MT) | 1410 | 1300 | 1380 | 1250 | 0 | 1250 |
| **Ending Stocks** (1000 MT) | 133 | 273 | 128 | 64 | 0 | 60 |
| **Total Distribution** (1000 MT) | 1669 | 1698 | 1694 | 1409 | 0 | 1465 |
| | | | | | | |
| (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 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 MEDTA. According to the WTO notification G/AG/N/UKR/40 by the Government of Ukraine, the 2020 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 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.

# Author Defined:
# Trade Data

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

| Origin | MY 2017/18 (Oct 17-Sept 18) | | MY 2018/19 (Oct 18-Sept 19) | | MY 2019/20 (Oct 19-Sept 20) | | % Change MY 2019/20 to MY 2018/19 |
|---|---|---|---|---|---|---|---|
| | Quantity | % Share | Quantity | % Share | Quantity | % Share | |
| _World | 553,228.0 | 100.0 | 402,942.0 | 100.0 | 114,881.0 | 100.0 | -71.5 |
| Middle East | 125,999.0 | 22.8 | 127,487.0 | 31.6 | 54,582.0 | 47.5 | -57.2 |
| EU 27 Brexit | 3,403.0 | 0.6 | 52,518.0 | 13.0 | 20,353.0 | 17.7 | -61.3 |
| Africa | 68,201.0 | 12.3 | 19,525.0 | 4.9 | 8,546.0 | 7.4 | -56.2 |
| Eurasian Economic Union | 15,087.0 | 2.7 | 45,695.0 | 11.3 | 8,417.0 | 7.3 | -81.6 |
| South Asia | 38,925.0 | 7.0 | 0.0 | 0.0 | 1,714.0 | 1.5 | ∞ |
| East and Southeast Asia | 363.0 | 0.1 | 371.0 | 0.1 | 273.0 | 0.2 | -26.3 |
| Turkey | 46,755.0 | 8.5 | 8,966.0 | 2.2 | 24,987.0 | 21.8 | 178.7 |
| Romania | 1,072.0 | 0.2 | 21,008.0 | 5.2 | 10,591.0 | 9.2 | -49.6 |
| Gaza Strip and West Bank | 0.0 | 0.0 | 1,560.0 | 0.4 | 8,684.0 | 7.6 | 456.7 |
| Lebanon | 3,900.0 | 0.7 | 0.0 | 0.0 | 8,580.0 | 7.5 | ∞ |
| Libya | 39,351.0 | 7.1 | 13,700.0 | 3.4 | 8,000.0 | 7.0 | -41.6 |
| United Kingdom | 30,343.0 | 5.5 | 17,631.0 | 4.4 | 7,434.0 | 6.5 | -57.8 |
| Poland | 440.0 | 0.1 | 3,422.0 | 0.9 | 7,159.0 | 6.2 | 109.2 |
| Moldova | 15,892.0 | 2.9 | 11,626.0 | 2.9 | 7,037.0 | 6.1 | -39.5 |
| Georgia | 17,358.0 | 3.1 | 13,889.0 | 3.5 | 5,216.0 | 4.5 | -62.5 |
| Russia | 1.0 | 0.0 | 10,493.0 | 2.6 | 4,973.0 | 4.3 | -52.6 |
| Uzbekistan | 214,017.0 | 38.7 | 91,967.0 | 22.8 | 4,916.0 | 4.3 | -94.7 |
| Tajikistan | 14,874.0 | 2.7 | 33,967.0 | 8.4 | 3,646.0 | 3.2 | -89.3 |
| Armenia | 15,082.0 | 2.7 | 10,248.0 | 2.5 | 3,219.0 | 2.8 | -68.6 |
| Israel | 3,137.0 | 0.6 | 13,929.0 | 3.5 | 3,204.0 | 2.8 | -77.0 |
| Afghanistan | 0.0 | 0.0 | 0.0 | 0.0 | 1,688.0 | 1.5 | 0.0 |
| Cyprus | 728.0 | 0.1 | 676.0 | 0.2 | 1,249.0 | 1.1 | 84.6 |
| Serbia | 0.0 | 0.0 | 118.0 | 0.0 | 564.0 | 0.5 | 380.0 |
| Sudan | 13,883.0 | 2.5 | 0.0 | 0.0 | 520.0 | 0.5 | 0.0 |
| Germany | 0.0 | 0.0 | 310.0 | 0.1 | 500.0 | 0.4 | 61.2 |
| United Arab Emirates | 1,352.0 | 0.2 | 0.0 | 0.0 | 416.0 | 0.4 | ∞ |
| Hungary | 0.0 | 0.0 | 0.0 | 0.0 | 396.0 | 0.4 | 0.0 |
| Turkmenistan | 14,269.0 | 2.6 | 4,402.0 | 1.1 | 281.0 | 0.2 | -93.6 |
| Latvia | 415.0 | 0.1 | 385.0 | 0.1 | 235.0 | 0.2 | -39.0 |
| Venezuela | 0.0 | 0.0 | 0.0 | 0.0 | 225.0 | 0.2 | 0.0 |
| Azerbaijan | 37,918.0 | 6.9 | 73,149.0 | 18.2 | 224.0 | 0.2 | -99.7 |
| Belarus | 4.0 | 0.0 | 1,811.0 | 0.5 | 178.0 | 0.2 | -90.2 |
| South Korea | 50.0 | 0.0 | 266.0 | 0.1 | 169.0 | 0.2 | -36.5 |
| Lithuania | 0.0 | 0.0 | 6,174.0 | 1.5 | 132.0 | 0.1 | -97.9 |
| Singapore | 1.0 | 0.0 | 104.0 | 0.0 | 104.0 | 0.1 | -0.3 |
| Other | 97,750.0 | 17.7 | 70,265.0 | 17.4 | 354.0 | 0.3 | -99.5 |

*Source: Trade Data Monitor, LLC*

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

| Origin | Subtotal Oct-Dec 2019 | MY 2019/20 | Oct-20 | Nov-20 | Dec-20 | Subtotal Oct -Dec 2020 | % Change Oct -Dec 2020 to Oct -Dec 2019 |
|---|---|---|---|---|---|---|---|
| _World | 16,856 | 114,880 | 19,159 | 22,899 | 10,522 | 52,580 | 211.94 |
| Middle East | 1,394 | 54,580 | 7,948 | 7,355 | 3,328 | 18,631 | 1236.51 |
| EU 27 Brexit | 5,608 | 20,351 | 3,894 | 5,326 | 0 | 9,220 | 64.41 |
| Eurasian Economic Union | 5,291 | 8,417 | 5,056 | 1,931 | 1 | 6,988 | 32.07 |
| Turkey | 0 | 24,986 | 780 | 0 | 0 | 780 | ∞ |
| Uzbekistan | 813 | 4,916 | 2,296 | 6,966 | 3,780 | 13,042 | 1504.18 |
| Romania | 4,475 | 10,591 | 0 | 2,990 | 0 | 2,990 | -33.18 |
| Tajikistan | 0 | 3,646 | 3,310 | 1,825 | 2,702 | 7,837 | ∞ |
| Armenia | 340 | 3,220 | 5,012 | 1,916 | 0 | 6,928 | 1937.65 |
| Gaza Strip and West Bank | 0 | 8,684 | 0 | 988 | 312 | 1,300 | ∞ |
| Moldova | 2,527 | 7,038 | 1,502 | 1,187 | 30 | 2,719 | 7.60 |
| Lebanon | 0 | 8,580 | 520 | 0 | 0 | 520 | ∞ |
| Africa | 0 | 8,544 | 0 | 0 | 0 | 0 | ∞ |
| Libya | 0 | 8,000 | 0 | 0 | 0 | 0 | ∞ |
| United Kingdom | 1,404 | 7,433 | 0 | 0 | 0 | 0 | -100.00 |
| Poland | 633 | 7,159 | 0 | 0 | 0 | 0 | -100.00 |
| Azerbaijan | 2 | 223 | 1,634 | 3,023 | 2,233 | 6,890 | 344400.00 |
| Spain | 0 | 0 | 3,634 | 2,024 | 0 | 5,658 | ∞ |
| Israel | 0 | 3,204 | 0 | 1,424 | 781 | 2,205 | ∞ |
| Georgia | 1,027 | 5,215 | 2 | 3 | 3 | 8 | -99.22 |
| Russia | 4,937 | 4,972 | 0 | 15 | 1 | 16 | -99.68 |
| South Asia | 0 | 1,713 | 0 | 133 | 609 | 742 | ∞ |
| Afghanistan | 0 | 1,687 | 0 | 133 | 609 | 742 | ∞ |
| Cyprus | 0 | 1,248 | 260 | 312 | 0 | 572 | ∞ |
| Other | 1,939 | 6,867 | 206 | 92 | 71 | 369 | -80.97 |

*Source: Trade Data Monitor, LLC*

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

| Origin | MY 2017/18 (Oct 17-Sept 18) | | MY 2018/19 (Oct 18-Sept 19) | | MY 2019/20 (Oct 19-Sept 20) | | % Change MY 2019/20 to MY 2018/19 |
|---|---|---|---|---|---|---|---|
| | Quantity | % Share | Quantity | % Share | Quantity | % Share | |
| _World | 1,452 | 100 | 1,410 | 100 | 1,466 | 100 | 4 |
| EU 27 Brexit | 858 | 59 | 1,004 | 71 | 1,151 | 79 | 15 |
| Africa | 22 | 1 | 25 | 2 | 27 | 2 | 6 |
| Middle East | 1 | 0 | 4 | 0 | 2 | 0 | -54 |
| East and Southeast Asia | 0 | 0 | 2 | 0 | 2 | 0 | -17 |
| Eurasian Economic Union | 3 | 0 | 0 | 0 | 0 | 0 | 0 |
| Denmark | 360 | 25 | 380 | 27 | 460 | 31 | 21 |
| France | 105 | 7 | 149 | 11 | 263 | 18 | 77 |
| United States | 491 | 34 | 309 | 22 | 229 | 16 | -26 |
| Poland | 18 | 1 | 126 | 9 | 142 | 10 | 13 |
| Germany | 206 | 14 | 131 | 9 | 113 | 8 | -13 |
| Romania | 48 | 3 | 56 | 4 | 75 | 5 | 33 |
| Switzerland | 63 | 4 | 45 | 3 | 44 | 3 | -3 |
| Netherlands | 64 | 4 | 60 | 4 | 39 | 3 | -35 |
| Mauritius | 20 | 1 | 22 | 2 | 25 | 2 | 11 |
| Finland | 5 | 0 | 14 | 1 | 22 | 1 | 52 |
| Other | 71 | 5 | 116 | 8 | 55 | 4 | -53 |

*Source: Trade Data Monitor, LLC*

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

| Origin | Subtotal Oct-Dec 2019 | MY 2019/20 | Oct-20 | Nov-20 | Dec-20 | Subtotal Oct -Dec 2020 | % Change Oct -Dec 2020 to Oct -Dec 2019 |
|---|---|---|---|---|---|---|---|
| _World | 456 | 1,466 | 103 | 201 | 177 | 481 | 5.48 |
| Africa | 6 | 27 | 0 | 0 | 0 | 0 | -100.00 |
| East and Southeast Asia | 1 | 1 | 0 | 0 | 0 | 0 | -100.00 |
| EU 27 Brexit | 347 | 1,151 | 69 | 143 | 116 | 328 | -5.48 |
| Middle East | 0 | 2 | 0 | 2 | 0 | 2 | ∞ |
| Austria | 3 | 8 | 2 | 0 | 0 | 2 | -33.33 |
| Belgium | 0 | 1 | 0 | 0 | 0 | 0 | ∞ |
| Cambodia | 1 | 1 | 0 | 0 | 0 | 0 | -100.00 |
| Costa Rica | 0 | 4 | 0 | 0 | 1 | 1 | ∞ |
| Croatia | 1 | 3 | 0 | 0 | 1 | 1 | 0.00 |
| Czech Republic | 0 | 1 | 2 | 2 | 0 | 4 | ∞ |
| Denmark | 120 | 460 | 40 | 40 | 39 | 119 | -0.83 |
| Finland | 9 | 20 | 5 | 4 | 0 | 9 | 0.00 |
| France | 77 | 262 | 0 | 16 | 15 | 31 | -59.74 |
| Germany | 80 | 112 | 0 | 27 | 5 | 32 | -60.00 |
| Israel | 0 | 1 | 0 | 0 | 0 | 0 | ∞ |
| Italy | 1 | 1 | 0 | 0 | 0 | 0 | -100.00 |
| Malawi | 0 | 1 | 0 | 0 | 0 | 0 | ∞ |
| Mauritius | 6 | 25 | 0 | 0 | 0 | 0 | -100.00 |
| Mozambique | 0 | 1 | 0 | 0 | 0 | 0 | ∞ |
| Netherlands | 1 | 38 | 0 | 0 | 0 | 0 | -100.00 |
| Poland | 35 | 142 | 8 | 36 | 45 | 89 | 154.29 |
| Romania | 18 | 75 | 10 | 10 | 9 | 29 | 61.11 |
| Slovakia | 0 | 0 | 2 | 0 | 0 | 2 | ∞ |
| Spain | 0 | 0 | 0 | 2 | 2 | 4 | ∞ |
| Sweden | 0 | 20 | 0 | 5 | 0 | 5 | ∞ |
| Switzerland | 21 | 43 | 0 | 18 | 49 | 67 | 219.05 |
| Turkey | 0 | 1 | 0 | 2 | 0 | 2 | ∞ |
| United Kingdom | 0 | 8 | 0 | 8 | 0 | 8 | ∞ |
| United States | 80 | 229 | 34 | 30 | 11 | 75 | -6.25 |

*Source: Trade Data Monitor, LLC*

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

| Origin | MY 2017/18 (Oct 17-Sept 18) | | MY 2018/19 (Oct 18-Sept 19) | | MY 2019/20 (Oct 19-Sept 20) | | % Change MY 2019/20 to MY 2018/19 |
|---|---|---|---|---|---|---|---|
| | Quantity | % Share | Quantity | % Share | Quantity | % Share | |
| _World | 1,250 | 100 | 5,147 | 100 | 25 | 100 | -100 |
| EU 27 Brexit | 208 | 17 | 0 | 0 | 22 | 88 | 40,118 |
| East and Southeast Asia | 0 | 0 | 0 | 0 | 0 | 0 | -33 |
| Middle East | 1,040 | 83 | 2,237 | 43 | 0 | 0 | -100 |
| Eurasian Economic Union | 0 | 0 | 543 | 11 | 0 | 0 | -100 |
| Africa | 0 | 0 | 0 | 0 | 0 | 0 | -82 |
| Latvia | 0 | 0 | 0 | 0 | 22 | 87 | 0 |
| Moldova | 2 | 0 | 0 | 0 | 3 | 12 | 0 |
| Panama | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Philippines | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Sierra Leone | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Singapore | 0 | 0 | 0 | 0 | 0 | 0 | 39 |
| Switzerland | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Tajikistan | 0 | 0 | 1,896 | 37 | 0 | 0 | -100 |
| Tanzania | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Turkey | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| United Kingdom | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Uzbekistan | 0 | 0 | 471 | 9 | 0 | 0 | -100 |
| Antigua and Barbuda | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Azerbaijan | 0 | 0 | 2,101 | 41 | 0 | 0 | -100 |
| Belize | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| China | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Comoros | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Cyprus | 208 | 17 | 0 | 0 | 0 | 0 | 0 |
| Dominica | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Georgia | 520 | 42 | 136 | 3 | 0 | 0 | -100 |
| Germany | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Greece | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Hong Kong | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Israel | 520 | 42 | 0 | 0 | 0 | 0 | 0 |
| Kyrgyzstan | 0 | 0 | 543 | 11 | 0 | 0 | -100 |
| Liberia | 0 | 0 | 0 | 0 | 0 | 0 | -100 |
| Malta | 0 | 0 | 0 | 0 | 0 | 0 | -100 |

*Source: Trade Data Monitor, LLC*

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

| Origin | Subtotal Oct-Dec 2019 | MY 2019/20 | Oct-20 | Nov-20 | Dec-20 | Subtotal Oct -Dec 2020 | % Change Oct -Dec 2020 to Oct -Dec 2019 |
|---|---|---|---|---|---|---|---|
| _World | 3 | 25 | 0 | 0 | 0 | 0 | -100.00 |
| EU 27 Brexit | 0 | 22 | 0 | 0 | 0 | 0 | ∞ |
| Latvia | 0 | 22 | 0 | 0 | 0 | 0 | ∞ |
| Moldova | 3 | 3 | 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 2017/18 (Oct 17-Sept 18) | | MY 2018/19 (Oct 18-Sept 19) | | MY 2019/20 (Oct 19-Sept 20) | | % Change MY 2019/20 to MY 2018/19 |
|---|---|---|---|---|---|---|---|
| | Quantity | % Share | Quantity | % Share | Quantity | % Share | |
| _World | 233.0 | 100.0 | 401.0 | 100.0 | 320.0 | 100.0 | -20.4 |
| Africa | 186.0 | 79.6 | 304.0 | 75.8 | 142.0 | 44.5 | -53.3 |
| EU 27 Brexit | 7.0 | 3.1 | 37.0 | 9.2 | 121.0 | 37.9 | 227.1 |
| East and Southeast Asia | 21.0 | 9.2 | 1.0 | 0.2 | 2.0 | 0.5 | 60.4 |
| South Asia | 1.0 | 0.4 | 0.0 | 0.0 | 1.0 | 0.3 | 1,310.0 |
| Middle East | 0.0 | 0.0 | 37.0 | 9.1 | 0.0 | 0.0 | -100.0 |
| Mauritius | 184.0 | 79.1 | 304.0 | 75.8 | 142.0 | 44.4 | -53.3 |
| France | 0.0 | 0.0 | 0.0 | 0.0 | 65.0 | 20.3 | 3,010,284.3 |
| Germany | 2.0 | 1.0 | 21.0 | 5.3 | 43.0 | 13.6 | 104.5 |
| Guatemala | 0.0 | 0.0 | 0.0 | 0.0 | 22.0 | 6.9 | 0.0 |
| Colombia | 0.0 | 0.1 | 7.0 | 1.8 | 18.0 | 5.7 | 159.8 |
| United Kingdom | 17.0 | 7.3 | 14.0 | 3.5 | 11.0 | 3.4 | -21.4 |
| Austria | 2.0 | 0.8 | 4.0 | 1.0 | 8.0 | 2.4 | 81.1 |
| Slovakia | 1.0 | 0.4 | 4.0 | 0.9 | 4.0 | 1.1 | 0.8 |
| Paraguay | 1.0 | 0.4 | 0.0 | 0.1 | 1.0 | 0.2 | 68.6 |
| India | 1.0 | 0.4 | 0.0 | 0.0 | 1.0 | 0.3 | 1,310.0 |
| Philippines | 0.0 | 0.1 | 0.0 | 0.0 | 1.0 | 0.2 | 223.5 |
| Cuba | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 0.3 | 1,580.0 |
| Thailand | 21.0 | 9.1 | 1.0 | 0.2 | 1.0 | 0.2 | 6.8 |
| Spain | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 0.3 | 44,420.0 |
| Switzerland | 0.0 | 0.0 | 1.0 | 0.2 | 1.0 | 0.3 | -16.2 |
| Italy | 0.0 | 0.0 | 3.0 | 0.8 | 0.0 | 0.0 | -100.0 |
| Czech Republic | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Israel | 0.0 | 0.0 | 37.0 | 9.1 | 0.0 | 0.0 | -100.0 |
| Reunion | 1.0 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Vietnam | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | -100.0 |
| Brazil | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 150.0 |
| China | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.0 |
| Belgium | 2.0 | 0.8 | 0.0 | 0.0 | 0.0 | 0.0 | 1,466.7 |
| Argentina | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | -100.0 |
| Mauritania | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.0 |
| Netherlands | 0.0 | 0.0 | 5.0 | 1.3 | 0.0 | 0.0 | -100.0 |
| Costa Rica | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 132.7 |

*Source: Trade Data Monitor, LLC*

**Attachments:**

No Attachments