

**MECAS(11)19 - International Survey on Yields and Prices for Sugar Crops****ABSTRACT**

The ISO has prepared an updated international survey on agricultural and industrial yields, as well as prices paid for sugar crops in a wide range of producing countries during the period between 2001/02 and 2009/10. A review of the developments in sugar crop volumes and yields shows that in spite of distortions imposed by national sugar regimes and protectionist policies, the world sugar economy keeps developing in accordance with economic theory.

Both production and exports are increasingly concentrating in the countries where sugar industries have been relatively more efficient in terms of sugar yields. Currently more than 40% of sugar output comes from relatively high efficiency producers in terms of industrial yields. The world average beet sugar yields generally remain lower than cane sugar yields, but the gap has reduced in size since the beginning of the last decade. As a result, while at the beginning of the 2000s the cane producers received, on average, 25% more sugar from one harvested hectare compared to their beet competitors, currently their advantage has been reduced to 7% only.

Cane prices in terms of world averages have remained nearly 50% lower than those for beet. In contrast to the 1990s, when both cane and beet prices and, hence, costs of raw material for the industry (measured as the cost of purchasing enough cane/beet to produce one tonne of sugar) showed a considerable decline, beet prices have been relatively stable while cane prices have shown a considerable increase since the beginning of the past decade. Indeed, the world average price for beet sugar price varied most of the seasons in a comparatively narrow range between USD47/tonne and USD53/tonne, while the world average price paid for cane in 2009 (USD27/tonne) was nearly 60% higher than in 2001. As a result, at the end of the past decade the gap between the raw material costs of the cane sector and beet sectors (USD221.33/tonne and USD305.33/tonne, correspondingly) reduced significantly, to about 30%, compared to nearly 50% at the beginning of the decade.

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\* Please note this report is also available in French, Russian and Spanish.

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