



NEWS FROM WABCG

AUGUST 2018

EDITORIAL

I wish sugar had increased as wheat did this summer! But sugar did the opposite, and we have never been so close to 10cts/lb...

When will it stop?

The situation is so dramatic that we have decided to make it the main topic of our next meeting, on the 26th November in London, during our ISO/WABCG consultation. Our provisional program has been sent out: we will try to have an overview on markets.



ISO Economists will present the situation on world sugar and ethanol markets. In addition, we will try to have an overview of what we can expect for the future, thanks to 4 traders, with views from Europe, Middle East, Australia, Africa, Asia and the Americas. We have asked representatives from Sucden, Wilmar, ECTP and Louis-Dreyfus Commodities to come to our meeting, to bring us their views.

I hope to see you all, cane and beet growers, in London next November! During adversity, we need to share opinions and ideas, and I am sure that the first session, which gives the floor to growers from all over the world, will once again be useful to everyone. Because, during hard times, it is good to bring all the family of growers together!

Jean-Pierre Dubray, President WABCG

NEWS FROM USA

As I write this, we are beginning our pre-harvest campaign. Our main harvest is planned to start October 1. The growing season goes by in a hurry.



We are anticipating another good crop. This year's crop was going in the ground before 2017 crop was finished being processed. Processing of the 2017 crop finished on May 23.

Although planting didn't really start till April 26, it was rapid the first half of May and the Red River Valley was 98% planted by May 15. The average planting date was May 5. Stand counts ranged from 240 down to 100 plants per 100ft of row (≈ 30.5 meters). Light stand counts have filled in for the most part with timely rains. The Moorhead and Drayton districts were very dry and needed rain to help germination and emergence. The Minnesota side of the Hillsboro and Crookston Districts had very good soil moisture to establish stands early. There was a total of 3,200 acres replanted ($\approx 1,295$ ha), most of it was due to wind events and dry seedbeds where seeds cracked and ran out of moisture, then died.

Weed control is starting to be a problem with some weeds becoming resistant to glyphosate. Some of the resistant weeds are waterhemp, common ragweed, and kochia. The Moorhead and Hillsboro are having the most trouble with this and are finding it necessary to change their weed control practices. Area of waterhemp and ragweed are being identified in the Crookston, East Grand Forks and Drayton Districts. Most of these areas are small enough that the growers can control by hand pulling. The root



World Association of Beet and Cane Growers

disease problem seems to be kept in check this year due to the dry conditions.

Cercospora was first found around July 4 and has been found in all 5 factory districts. Our Ag staff informed growers of its presents and recommended the proper tank mixes for control and management of resistance. Growers in the southern part of the valley find themselves spraying 5-6 times, while growers in the north are on a 2-3 spray program.

The potential for a good crop is high, with the first estimates on July 2 coming in at 30.6 ton/acre (≈68.7mt/ha) compared to 31.1 (≈69.8mt/ha) a year ago at this time. Since then with the sampling that is being done the estimate has gone up to 34.4 tons/acre (≈77.3mt/ha). This is only an estimates and with the extremely dry conditions the entire growing area has been subjected to, this might be on the high side. Will be able to give an accurate report in November.

David Thompson
Red River Valley Sugarbeet Growers Association (USA)

Next meeting of the WABCG:
26 November 2018
London, United Kingdom

WABCG - World Association of Beet and Cane Growers	
Annual Meeting 2018	
26 November 2018	
London, United Kingdom	
1	Registration and Welcome
2	Opening Remarks
3	Chairman's Report
4	Secretary's Report
5	Financial Report
6	Business Meeting
7	General Assembly
8	Vote on Resolutions
9	Vote on New Members
10	Vote on Officers
11	Vote on Committees
12	Vote on Resolutions
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Contact us for more information!

NEWS FROM TURKEY

In Turkey, sugar production is used to regulate by a public institute called the “Turkish Sugar Board”, which announces and allocates annual production quotas to the existing producers, as per the Sugar Law of 2001.



By decree- law no: 696, published in December 2017, “Turkish sugar board” has closed and its authorisations have transferred to the Ministry of Agriculture. Today, it maintains its activities as a “Directorate of Sugar Board” depending upon Ministry of Agriculture.

Turkey produces sugar from sugar beets in most regions, but the majority of production comes from the Central Anatolia region, near the cities of Ankara, Konya, Kayseri, Eskisehir, Afyon, Tokat, Yozgat, Niğde and Aksaray. Sugar beet fields are rotated with cereals, pulses, fodder crops and sunflowers. Sugar beets are planted in the spring (April), and the harvest begins in October. However, these periods vary slightly according to the climate conditions of the region.

2017/18 MY	
Beet area:	339,217 ha
Average sugar content:	6.4%
Average beet yield:	61.4mt/ha
Beet Production:	20,828,316 tons
Sugar yield:	8.16 t/ha
Sugar production:	2,770,000 tons

The starch based sugar quota has been reduced from 10% to 5% by Law No.7103 dated 21.03.2018. The quota surplus that emerged after this arrangement was transferred to Turkish Sugar Refineries Corporation (Türkşeker).



The map below shows the locations of all production facilities throughout Turkey. The plants marked in gray (25) are the public beet sugar production factories that belong to Turkseker of which 14 plants are under privatization process. The dark green plants (8) are private (3) and cooperative-owned (5), which belong to Pankobirlik) beet sugar production factories. The yellow plants (6) are starch based sugar production plants, all of which are private.

Figure 1: Map of Sugar and SBS Production Facilities in Turkey



Policy: Turkish sugar beet producers used to be against privatization due to social and economic reasons. One of the main arguments of the anti-privatization group is that once these plants are privatized, only a few profitable refineries will survive and the rest will be shut down, causing a spike in unemployment. It is clear that this situation will harm both the national and the regional economy. The union of sugar beet growers cooperatives, Pankobirlik has proposed several alternatives to the government for sustainability of the sugar industry. Despite all these efforts, 13 sugar factories have been privatized.

Ethanol & Molasses: Sugar beets are the main source of bio-ethanol production in Turkey. Annual molasses production does not vary vastly from year to year and is around 670,000 MT. Currently there is

a three percent mixture rate of bio-ethanol into fuel as specified by the Energy Market Regulatory Authority (EPDK). This ratio is expected to increase for the following years. The law requires this bio-ethanol to be obtained from only domestically grown agricultural products. Currently there are three plants producing fuel-purpose bio-ethanol with an established total production capacity of 150 million liters. Some 84 million liters of this come from the Pankobirlik’s Cumra Plant in Konya where ethanol is produced from sugar beet molasses.

Liquid sugar :The first liquid sugar production in our country started in May 2005 in Çumra facilities connected to Konya Şeker. Established liquid sugar production facilities in Çumra increased production capacity twice in 2007 to 150 thousand tons per year in order to meet food industry demand. Liquid sugar does not contain any health risks because it is derived entirely from natural sources and from sugar beets.

Taner TAŞPINAR, General Manager
PANKOBIRLIK (Union Of Sugar Beet Growers Cooperatives), Turkey

Latest study:
“The sugar sector in Pakistan”
 now available upon request.

The World Association of Beet and Cane Growers (WABCG) is the international organisation which groups together the national and regional associations of sugar beet and sugar cane growers at international level. WABCG has 36 member associations and unites over 5 million sugar beet and sugar cane growers from the five continents. WABCG is present in over 30 countries, producing 60% of world sugar production.