

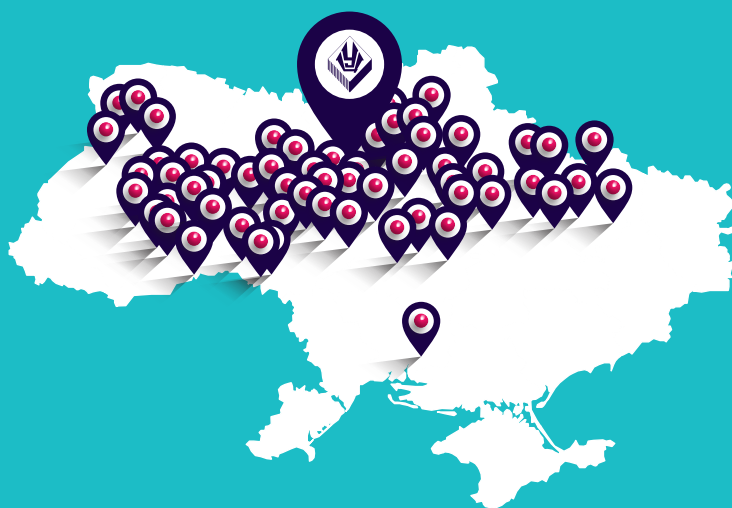
NATIONAL ASSOCIATION OF SUGAR PRODUCERS OF UKRAINE



UKRAINIAN
SUGAR
INDUSTRY
IN FIGURES

MOLASSES PRODUCTIONS
HARVEST FACTORIES
EXPORT
SUGAR BEETS % %

SUGAR



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NATIONAL
ASSOCIATION
OF SUGAR
PRODUCERS
OF UKRAINE

2018 / 19 MY





CONTENT

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- 16 ● PROCESSING
- 26 ● EXPORT

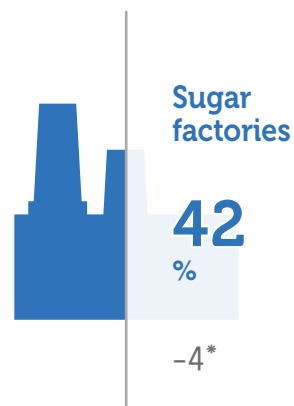
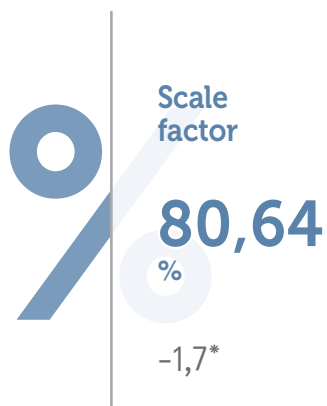
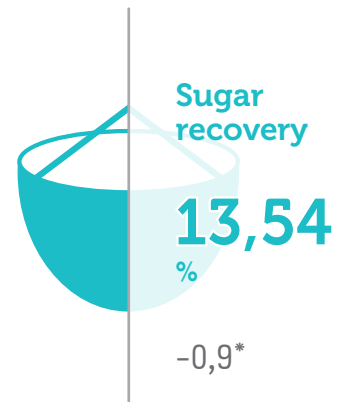
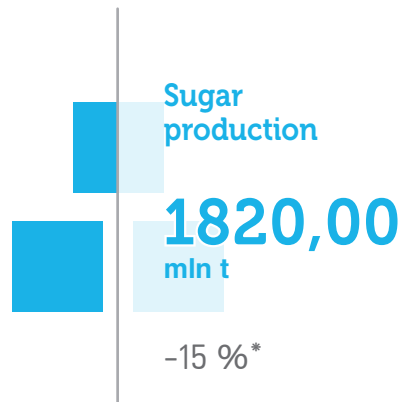
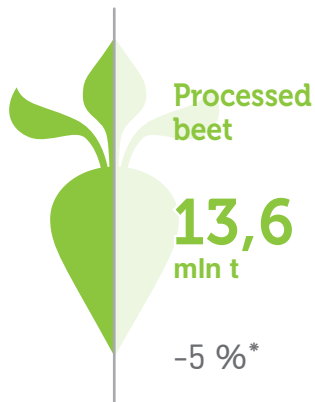


For the last year, Ukrainian sugar industry has gained a reputation as the world's leading beet sugar exporter and shown its competitiveness on the global market. It has become possible due to the increase in sown area, the launch of additional production capacities and increased sugar beet yield. In addition, this year, the production of the 1-st category sugar has reached a record 50% in the overall structure, indicating that producers are actively modernizing production and investing in the development of the sugar industry.

This catalog contains only dry material — the main figures in the sugar industry, which make it possible to understand the way the sugar industry has already come through and the fact that this is the beginning of a rather long but real path of self-improvement.

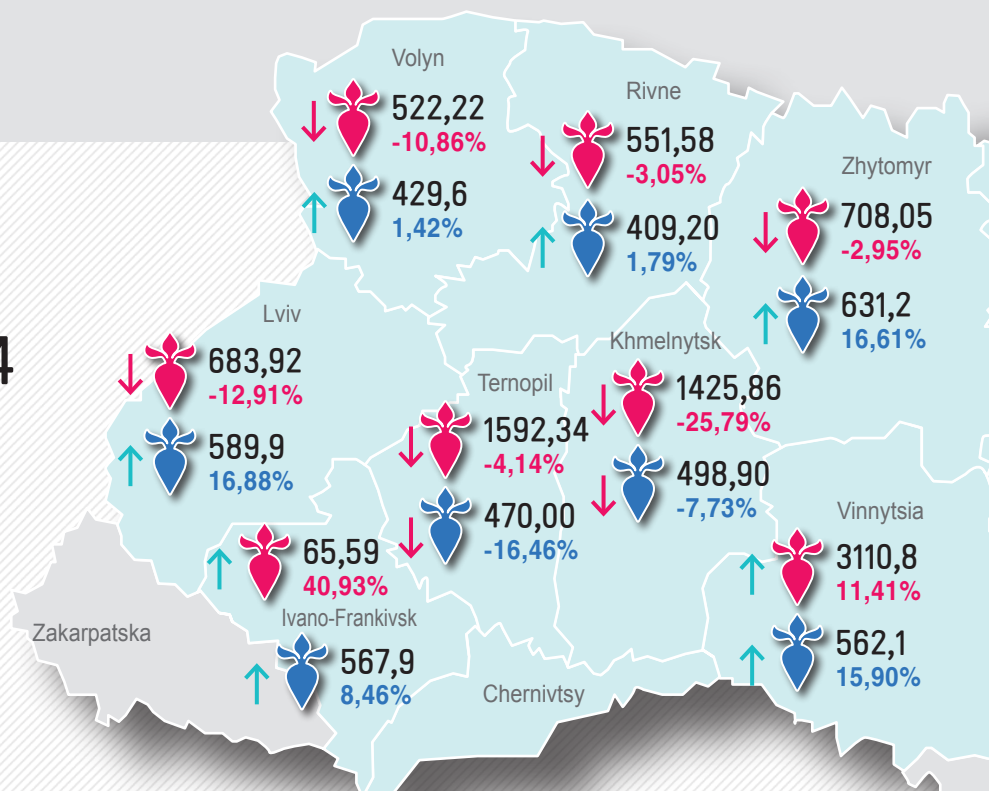
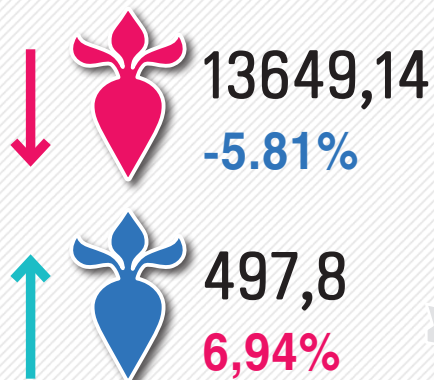
2018/19 MY

SUGAR SEASON



* - change in comparison with 2017/18 MY

Ukraine, Total



SUGAR BEETS 2018-2019





Sugar beet sown areas, ths ha

Region	2013	2014	2015	2016	2017	2018
Ukraine	270,5	331	237	292	311,3	274,3
Vinnitsia	64	60,9	51,7	54,7	57,6	55,3
Volyn	17,5	15,7	11,3	13,5	13,8	12,1
Dnipro	0,8	0,7	0,7	1,2	1,1	1,1
Zhytomyr	9,9	12,6	12,2	11,7	13,5	11,2
Ivano-Frankivsk	2,3	2,3	0,6	1,1	0,9	1,1
Kyiv	15,5	22,2	15,7	19,9	20,9	23,1
Kirovograd	8,4	14,9	13,6	17,1	15,2	10,7
Lviv	16,3	15,8	12,4	13,2	15,5	11,6
Mykolaiv	2,8	1,3	1,5	3,6	2,3	
Poltava	31,4	39,7	28,6	38,3	35,5	33,5
Rivne	12,2	13	10,6	11,9	14,2	13,5
Sumy	1	1,8	1,8	1,8	6,3	3,3
Ternopil	33,5	37,3	16,5	22,6	29,5	33,9
Kharkiv	10,8	19,7	15,5	24,1	23,7	15,3
Khmelnysk	24,6	44,4	26	35,3	35,6	28,7
Cherkasy	11,4	17,3	10,9	12,8	16,4	13,6
Chernivtsy	0,3	2,8	0,2			
Chernigiv	7	6,9	6,7	6,9	6,3	5,7

Source: operational data of the State Statistics Service of Ukraine





Density of sugar beet planting, ths pcs/ha

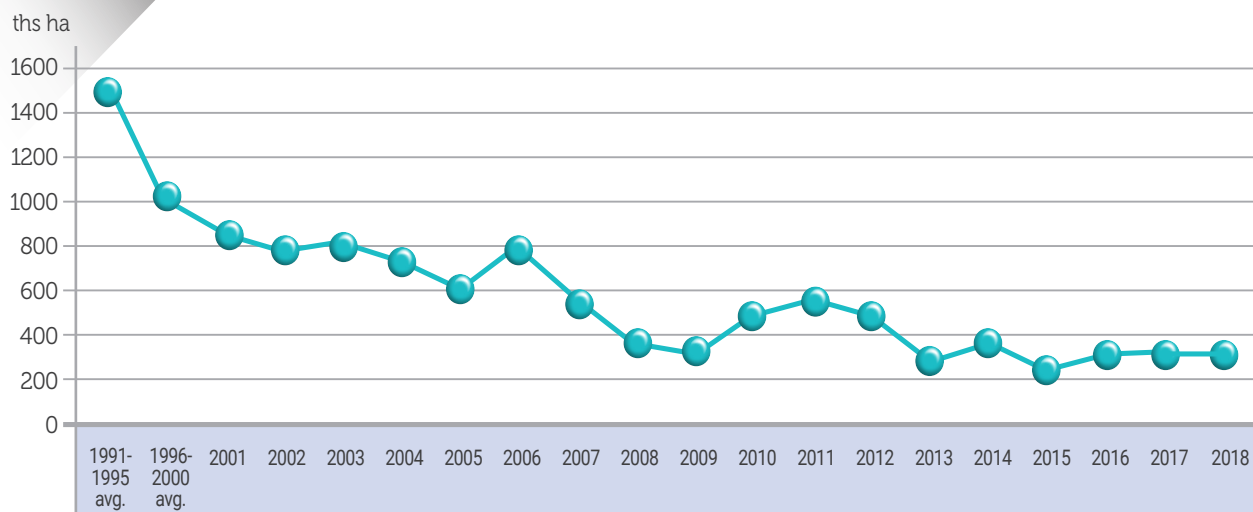
Region	2014	2015	2016	2017	2018
Ukraine	100	101	96	100	96
Vinnysia	103	102	105	104	100
Volyn	101	92	92	77	86
Zhytomyr	105	109	104	102	91
Kyiv	102	105	74	105	102
Kirovograd	102	101	96	99	93
Lviv	94	98	104	104	96
Mykolaiv	92	90	105	89	
Poltava	111	107	85	108	100
Ternopil	95	96	97	103	93
Kharkiv	92	92	100	92	93
Khmelnysk	100	100	101	105	93
Cherkasy	93	96	104	89	100
Chernigiv	85	87	85	95	95
Sumy	-	-	-	98	94

Source: operational data of the State Statistics Service of Ukraine

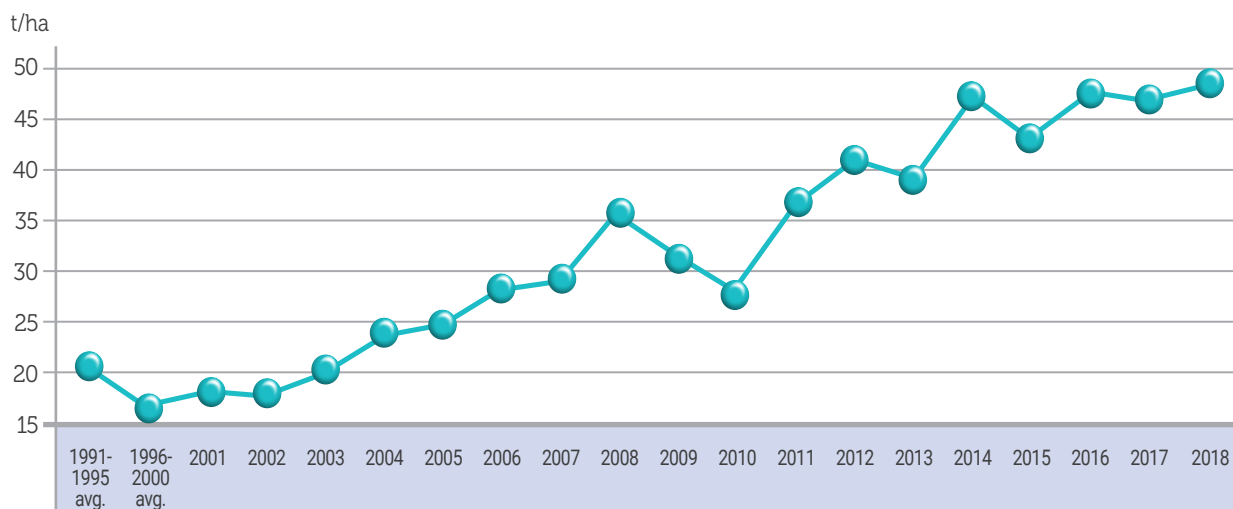




Sugar beet sown areas, ths ha



Sugar beet yield, t/ha



Source: operational data of the State Statistics Service of Ukraine





Sugar beet yield, centner/ha

Region	2013	2014	2015	2016	2017	2018
Ukraine	398,9	476,5	435,8	481,5	465,5	497,8
Vinnysia	400	499,9	398	482,4	485,0	562,1
Volyn	331	414	370,9	429	423,6	429,6
Dnipro	494	401,4	426,5	470,2	497,1	488,4
Zhytomyr	429	254,6	201	222,3	541,3	631,2
Ivano-Frankivsk	303	521	515,7	617,9	523,6	567,9
Kyiv	454	598,1	560,9	564,2	483,2	606,0
Kirovograd	339	353,3	356,6	385,1	386,7	363,2
Lviv	400	494,6	469	513,6	504,7	589,9
Mykolaiv	518	491,1	572,4	591,2	423,2	
Poltava	236	438,6	487,5	544,5	407,7	439,0
Rivne	435	419,6	429,1	456,5	402,0	409,2
Sumy	298	437,2	423,9	433	400,9	440,9
Ternopil	299	464,9	440,5	440,1	562,6	470,0
Kharkiv	361	426,6	348,63	501,8	357,6	376,5
Khmelnysk	430	532,1	438,8	450,2	540,7	498,9
Cherkasy	422	498,5	450,6	425,9	403,3	515,1
Chernivtsy	311	388,6	298,3			
Chernigiv	376	367,7	463,1	422,5	430,8	440,3

Source: operational data of the State Statistics Service of Ukraine





Sugar beet total production, ths t

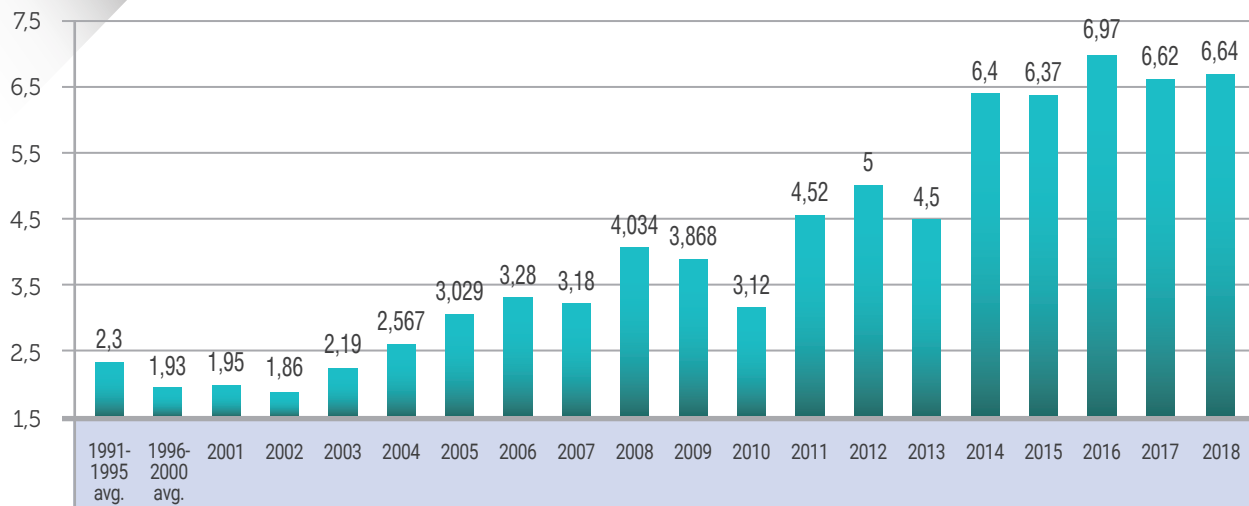
Region	2013	2014	2015	2016	2017	2018
Ukraine	10789,4	15734,1	10330,8	14011,3	14491,42	136491,4
Vinnitsia	2562	3044,2	2057	2638,6	2792,25	3110,80
Volyn	580	650,7	420,2	580,4	585,82	522,22
Dnipro	38	28,6	31,4	54,2	55,08	53,66
Zhytomyr	424	639,8	607,2	607,3	729,59	708,05
Ivano-Frankivsk	69	121,4	33,4	63,8	46,54	65,59
Kyiv	703	1328,7	882,1	1123,8	1008,59	1395,69
Kirovograd	284	526,4	483,3	657,5	586,23	389,40
Lviv	654	708,8	583	677,9	785,28	683,92
Mykolaiv	146	65,6	85,4	210,4	95,65	
Poltava	1546	1740	1395,8	2089,6	1445,73	1473,09
Rivne	531	544,1	454,4	543,9	568,92	551,58
Sumy	31	77,1	74,6	79,1	251,33	140,09
Ternopil	1003	1734,1	726,6	994,1	1661,04	1592,34
Kharkiv	388	840,9	538,7	1207,2	850,44	576,77
Khmelnysk	1058	2362,7	1140,4	1586,4	1921,26	1425,86
Cherkasy	482	862,7	490,5	544,4	662,76	700,03
Chernivtsy	9	109,5	5,6	-	-	
Chernigiv	263	255,4	311,1	289,5	269,24	249,77

Source: operational data of the State Statistics Service of Ukraine





Produced sugar on 1 ha of the sown area, t





PROCESSING



- HARVESTING
- SUGAR FACTORIES
- PRODUCTION
- SCALE FACTOR
- MOLASSES



Number of working sugar factories in the season

Figures	Duration of production, days	Duration of exrtaction, days	Number of working sugar factories, units	Capacity of the involved refineries, ths t
1991-1995 avg.	79,7	72,6	190	507,8
1996-2000 avg.	52,4	41,7	172	474,6
2001	47,6	42,6	147	399
2002	63,1	46,4	128	364,1
2003	51,4	45	121	336,42
2004	61,6	53,7	120	339,6
2005	59	53,5	116	330,31
2006	78,1	73,4	119	336,4
2007	59,5	54	110	310,19
2008	61,5	55,8	70	218,56
2009	54	49,2	56	180,47
2010	63,7	58,4	73	224,6
2011	75,14	70,71	77	240,2
2012	80,68	76,67	63	212,88
2013	64,8	61,04	38	137,42
2014	84,9	81,46	48	180,1
2015	71,8	68,2	36	134,97
2016	89,4	84,3	42	153,3
2017	83,52	80,12	46	175
2018	76,38	73,5	42	159,4

PROCESSING



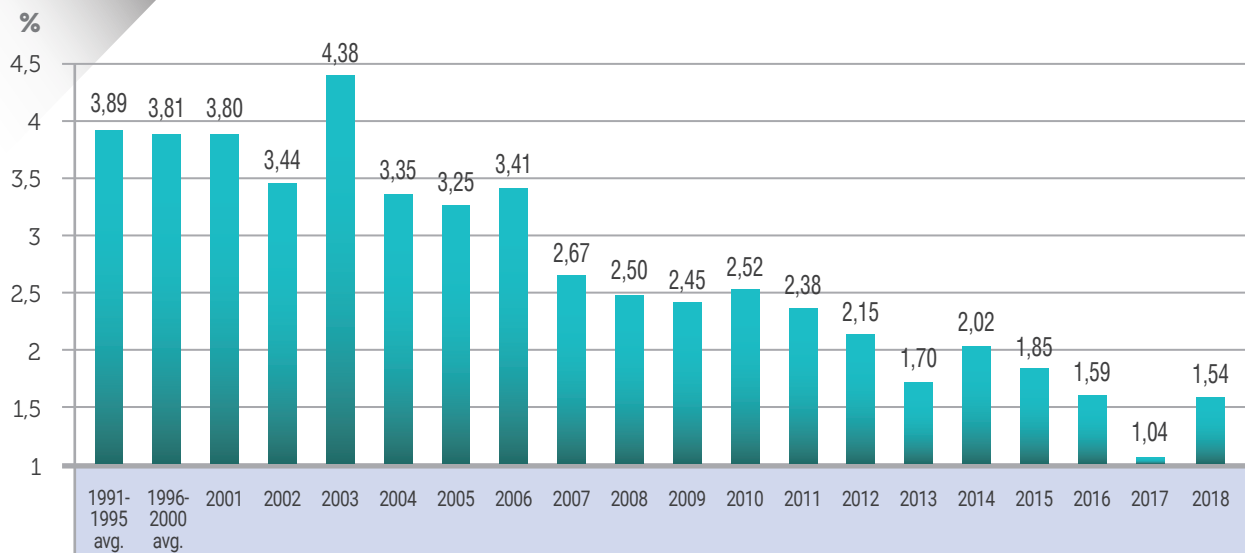


Sugar beet storage

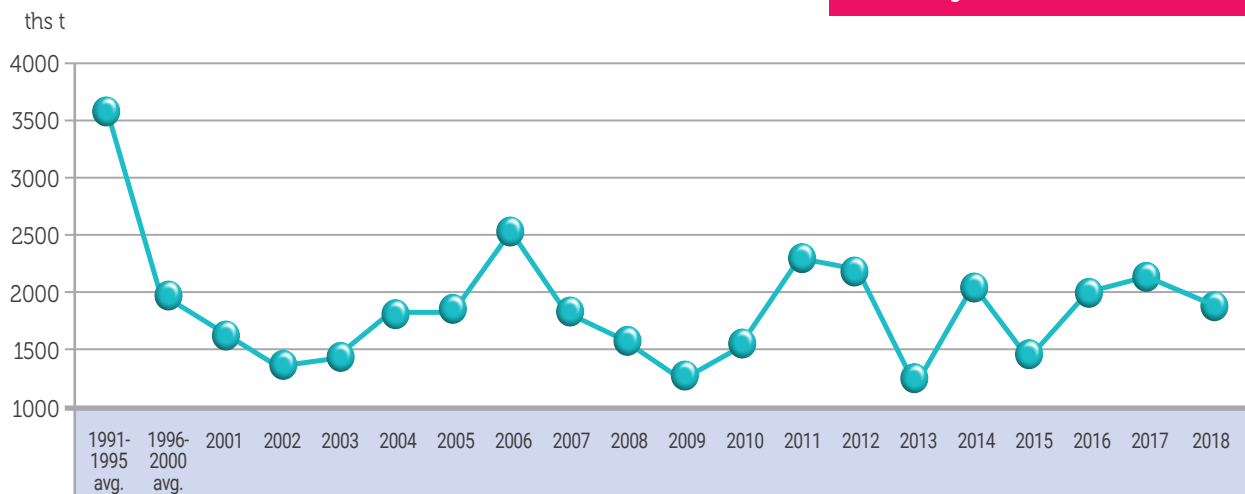
Region	Sugar beet storage, ths t			Sugar content at sugar beets when deliver, %		
	2016	2017	2018	2016	2017	2018
Vinnitsia	2861,7	3064,4	3290,4	18,54	17,64	16,49
Volyn	629,9	769,8	527,7	17,59	16,25	18,06
Zhytomyr	478,3	480,3	534,7	19,65	16,91	16,73
Kyiv	1408,6	1153,4	1418,3	17,69	17,44	15,83
Kirovograd	557,5	513,3	353,6	16,57	16,44	15,35
Lviv	908,7	1040,6	802,4	17,72	16,79	16,35
Mykolaiv	368,9	274,2	-	16,44	16,94	-
Poltava	2118,3	1514,1	1540,9	16,89	17,90	17,14
Sumy		181,4	68,4		16,08	17,66
Ternopil	1275,4	1930,6	1644,4	18,20	17,61	16,79
Kharkiv	1209,9	841,4	573,3	16,34	17,12	16,86
Khmelnysk	1592,5	2103,9	1454,5	17,84	16,69	16,22
Cherkasy	280,6	411,3	507,2	17,26	17,30	15,82
Chernigiv	191,2	195,1	197,7	16,41	17,06	16,26
Ukrsugar	13881,35	14473,76	12913,4	17,65	17,23	16,53



Sugar beet losses during storage, %



Sugar production



In 2018, Ukraine produced more than 1.82 mln t of sugar at 42 sugar refineries

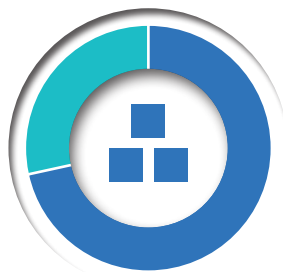




Sugar produced by sugar companies for 2016-2018

№№	Name of enterprise, company	Produced sugar, ths t	Ratio, %	Produced sugar, ths t	Ratio, %	Produced sugar, ths t	Ratio, %
		2016		2017		2018	
1	Agri-Industrial Holding «Astarta-Kyiv»	504,859	25,14	462,864	22,48	351,979	19,32
2	«Radekhivskyi Sugar» LLC	248,861	12,39	433,065	21,03	335,483	18,41
3	«Ukrprominvest-Agro» LLC	252,945	12,60	241,315	11,72	291,771	16,01
4	Agrofirm «Svitanok» LLC	130,042	6,48	103,298	5,02	110,501	6,06
4 a)	«Gnidava Sugar Refinery» LLC	-	-	-	-	-	-
4 b)	«Teophipolskyi Sugar» LLC	-	-	-	-	-	-
5	«ASPIK GROUP» LLC	-	-	85,763	4,16	59,909	3,29
5 a)	«Galychyna sugar Company» LLC	81,940	4,08	-	-	-	-
6	«Panda» LLC	38,845	1,93	56,137	2,73	65,340	3,59
7	«Gals-Agro» LLC	53,983	2,69	49,421	2,40	55,058	3,02
Total		1311,475	65,31	1431,863	66,9	1270,041	69,70
All other sugar refineries		696,432	34,69	709,00	33,13	549,959	30,30

30,30%
others



69,70%
integrated
companies

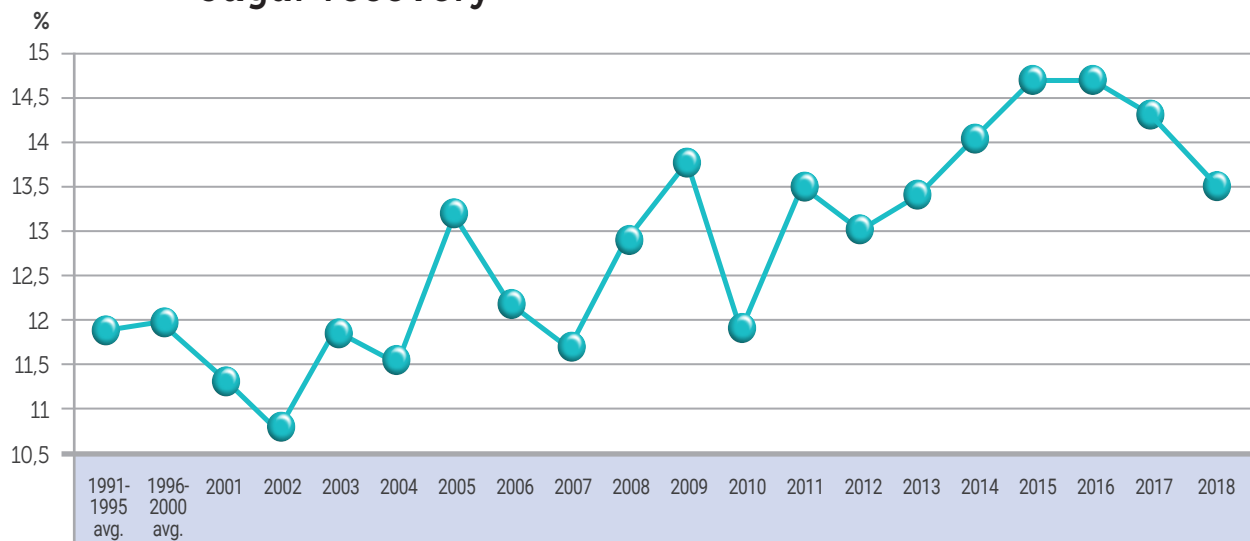
Integrated companies, formed in beet sugar industry in recent years, produced sugar 69.80% of the total production during 2018 sugar beet processing season



Production of sugar of the I and II categories

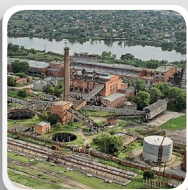
Figures		Production of the I category sugar	Production of the II category sugar
2014	ths t	192,094	446,143
	% of the total production	9,23	21,44
2015	ths t	336,03	129,601
	% of the total production	23,5	9,1
2016	ths t	614,493	412,977
	% of the total production	30,6	20,6
2017	ths t	962,134	359,279
	% of the total production	46,72	17,45
2018	ths t	847,552	307,00
	% of the total production	46,57	16,86

Sugar recovery



PROCESSING





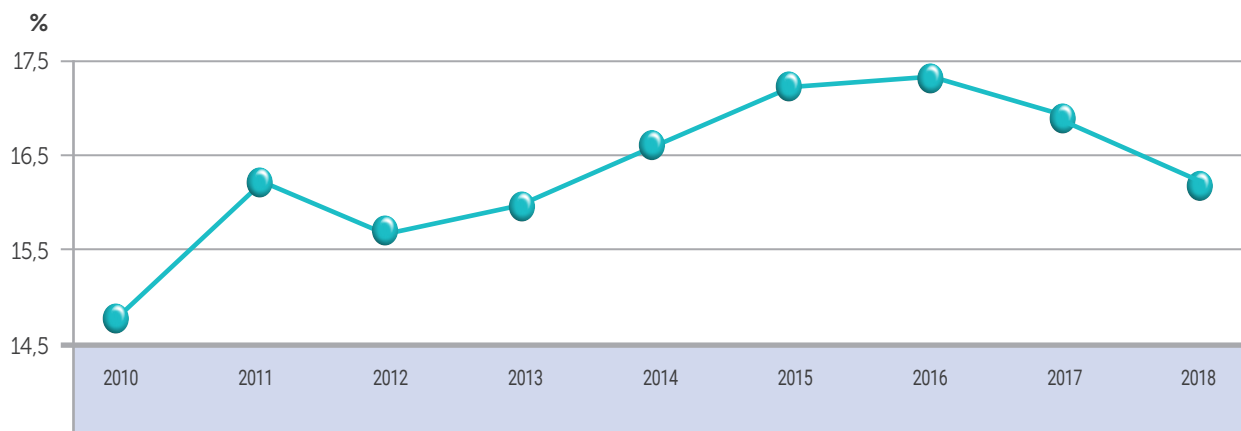
Sugar refineries – the largest producers of the I category sugar in production season of 2018, t

Refineries	Total	I category	I category ratio in production, %
«Podillia Foods Company» (Kryzhopil)	170 968,74	98 302,03	57,50
«Radekhivskiy Sugar» LLC (Chortkiv Production)	88 355,48	86 271,32	97,64
«Zoria Podillia» Foods Company» LLC (Gaisin)	120 802,25	78 491,50	64,98
«Radekhivskiy Sugar» LLC (Khorostkiv production)	78 965,40	72 000,00	91,18
«Tsukoragroprom» LLC (Yaresky Sugar Refinery)	77 116,35	68 658,75	89,03
«Narkevychy Sugar Refinery» LLC	70 123,80	67 438,90	96,17
«Tsukoragroprom» LLC (Zhdanivka Sugar Refinery)	58 167,00	57 842,00	99,44
«Lynovyt'sk «Krasnyi» Sugar Refinery» PC	25 145,00	4 716,50	18,76
«Kraevyd» LLC (Zgurivsk Sugar Refinery)	21 073,40	4 000,00	18,98
«Tsukoragroprom» LLC (Globyno Sugar Refinery)	40 961,75	39 901,95	97,41
«Novoorzhytsky Sugar Refinery» LLC	43 028,90	35 713,75	83,00
«Teophipolskyi Sugar» LLC	52 870,00	28 210,00	53,36
«Starokostiantynivcukor» LLC	35 406,00	26 601,20	75,13
«Tsukoragroprom» LLC (Kobeliatsky Sugar Refinery)	38 360,00	23 836,70	62,14
«Shepetivka Sugar» LLC	24 503,00	2 150,00	8,77
«Cygnet-Center» LLC (Tsiyrupa Sugar Refinery)	28 655,50	19 334,00	67,47
«Yuzepho-Mykolaiv Agroindustrial Company» LLC	23 856,40	13 440,00	56,34
Novoivanivskiy Sugar Refinery	24 221,50	12 669,15	52,31
«Radekhivskiy Sugar» LLC (Radekhiv production)	108 485,40	107 974,20	99,53



Sugar content of beet cossettes (in terms of regions and years)

Regions	2016	2017	2018
Vinnitsia	18,01	17,11	15,99
Volyn	17,09	15,73	17,72
Zhytomyr	19,42	16,59	16,35
Kyiv	17,16	16,87	15,28
Kirovograd	15,99	16,07	15,01
Lviv	17,67	16,79	16,22
Mykolaiv	16,15	16,65	-
Poltava	16,7	17,73	17,07
Sumy	-	15,83	17,6
Ternopil	17,84	17,57	16,76
Kharkiv	16,16	16,87	16,47
Khmelnytsk	17,55	16,39	15,94
Cherkasy	16,45	16,56	15,51
Chernigiv	15,76	16,69	15,81
Ukrsugar	17,28	16,91	16,22

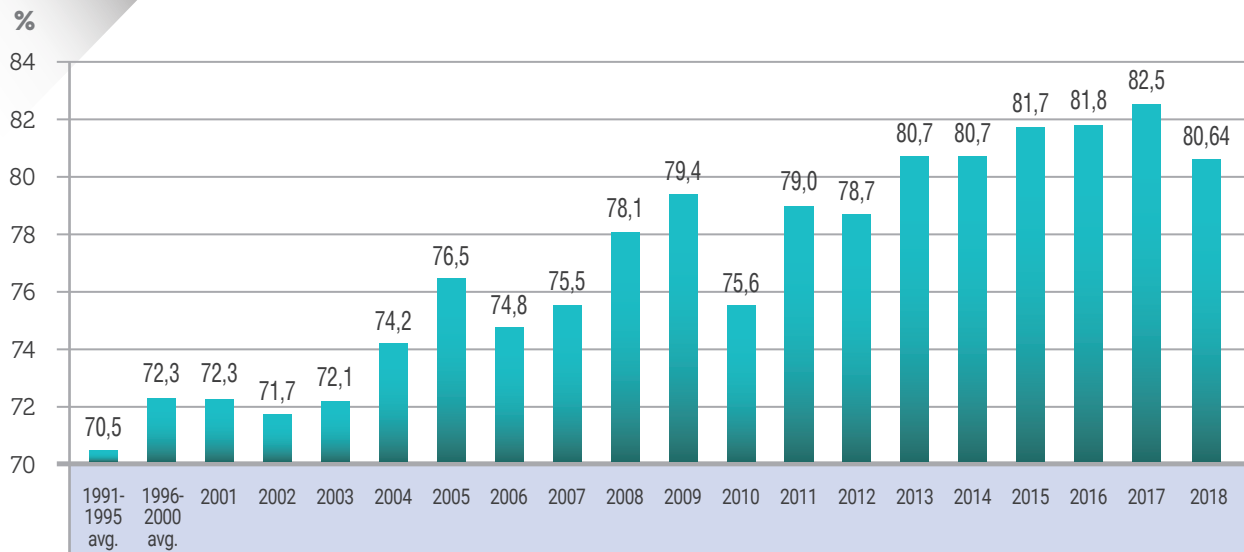


PROCESSING





Scale factor for production season of 2018





EXPORT



- WHITE SUGAR
- RATING OF EXPORTERS
- BEET MOLASSES
- GRANULATED PULP





Export of white crystalline sugar in terms of 2010-2018 calendar years and major importers, t

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018
Kazakhstan			120748,0	22955,0	3,0	16401,0	21674		
Kyrgyzstan	266,0	261,0	13715,0	24208,0	2882,0	41490,0	6495	2572	5834,70
Canada							555	3	
Cyprus							314	2288	
China							2077	312	
Kuwait							130		
Cote d'Ivoire								34520	
Korea							48	50	
Georgia	1,0	4594,0	6864,0	28488,0	348,0	5316,0	49397	29011	9516,80
Guinea							25000		
Ghana			260,0				104	520	
Hong Kong							3130	156	
Gambia								8000	
Azerbaijan						2992,0	22963	44938	44736,90
Afghanistan							1040		
Armenia					25,0			6152	12959,95
Moldova	20,0	33,0	9430,0	11439,0	2222,0	6816,0	8231	11103	17232,84
Belarus						606,0	1	6	
Uzbekistan		200,0	4734,0	8551,0		1287,0		9748	285273,90
Uganda							520	260	
Turkmenistan		20,0	3970,0	10392,0		4516,0	5335	17580	
Tunisia							32700	1040	
Togo								25000	
Syria			7188,0	449,0					
Russia	2,0		177,0	5979,0	2,0	6664,0	1	1	
Hungary			1220,0						
Slovakia		1044,0	20					46	
Romania		40,0			168,0	18029,0	29748	4258	13875,75
Turkey			375,0	690,0	1,0	54,0	14803	49145	34486,29
Greece			125,0	1404,0		126,0	2341	9944	
Croatia			850,0	1244,0					
Tajikistan			19,0			2000,0	8818	15273	22758,15
Poland			19,0	1015,0	436,0	1091,0	5311	3306	2385,28
Pakistan							520		
Montenegro				1008,0		270,0	4496	11157	
UAE						273,0	2805	4160	
Estonia								66	
UR Tanzania								130	

EXPORT





Country	2010	2011	2012	2013	2014	2015	2016	2017	2018
Latvia						525,0	589		
Lithuania							1375		2457,26
Lebanon			4453,0	1948,0			5977	5420	2340,14
Libya							4859	39876	43815,00
Netherlands								432	
Macedonia							2314		
Palestinian territories							250	500	
South Africa							5616	2002	
Switzerland							5135	27170	14386,55
Egypt							29610	1040	
Ethiopia							3900		
Albania				1316,0			14117	11993	
Bulgaria						79,0			3016,07
Bosnia and Herzegovina							1914	2225	
Benin				840,0			1300		3640,00
Djibouti							1780	520	
Iran						5564,0			
Iraq							540	66	
Israel				700,0			14078	16588	
Spain							7500	1500	4320,00
Italy								99	
Jordan								1040	
Saudi Arabia							2340	3900	
Singapore							624	3379	
Somalia							5460	20550	7556,25
Sudan							9672	44579	
Surinam								936	
United Kingdom							1509	12287	27302,00
Mauritania								16500	
Myanmar							17888	25976	
Sri Lanka							78110	68926	12821,35
Other countries	25,0	46,0	233,0	374,0	94,0	718,0	593	29	15829,29
TOTAL	314,0	6238,0	174400,0	123000,0	6181,0	114817,0	465607,0	598278,0	586544,47



Rating of sugar exporters in 2018

Name	ths t
«Radekhivskyi Sugar» LLC	150,9
«Tsukoragroprom» LLC	65,8
«Podillia Foods Company»	60,7
«Teophipolskyi Sugar» LLC	50,2
«Zoria Podillia» Foods Company» LLC	37,7
«Novoorzhytsky Sugar Refinery» LLC	34,4
«Elit railways» LLC	23,9
«ED&F Man Trading Ukraine» LLC	20,5
Novoivanivskyi Sugar Refinery	15,2
«Melagrain» Company	12,8
«Novomyrgorodskyi Sugar» LLC	11,2
«Agroalliance Ltd» LLC	9,4
Narkevychy Sugar Refinery	9,2
«Lynovyt'sk «Krasnyi» Sugar Refinery» PC	8,7
«Ukrainian Sugar Company» LLC	8,6
«Transco» LLC	7,8
«Skvyra Center of Grain Production» OJSC	7,8
«Shepetivka Sugar» LLC	6,3
Dovzhenko, APE	4,1
«Shamraivskyi Sugar» LLC	3,6
Others	37,4
TOTAL	586,5

EXPORT





Export of beet molasses in terms of CY 2010-2018 and main importers, t

Countries	2010	2011	2012	2013	2013	2014	2015	2017	2018
Bulgaria		6082,6	2834,9						
Armenia					445,8	554,3			
Great Britain				19001,6				70,0	
Vietnam	49266,3	31849,0	22901,8	17031,0	21000,0	19279,3			
Spain		72950,4	71547,7			29500,0		5775,0	
Italy			8426,8	8445,2					
Jordan			4541,6						
Canada			42606,0						
Latvia	292,8	259,2	187,6	165,7	153,1	112,7	101,9	132,4	27,06
Netherlands	10001	6300,0	17860,0	47747,0	5651,0		15071,4		
Germany				1000,8					
Poland	8329,4	56786,5	54324,5	30898,6	13015,4	24377,5	4700,1	11365,5	8770,07
Portugal	2299,7		13903,0						
Romania					0,3	9,2	13,0	16,0	11,06
Slovakia			42,7						
USA		23344,7	39402,7				15000,0		
Taiwan	19485,1	20000,0	13707,4			5000,0		22928,0	
Turkey		8499,4	32442,6	21200,0		32352,5			
Hungary		56038,0	86569,4	25277,4	1077,5	13648,6	23722,6	55864,5	27389,70
Czech Republic	45,2	47,0							
Moldova								23,88	
Israel								186,8	1220,31
Cyprus						45,7	414,0		145,30
Russia						87,2			
TOTAL	89719,4	282156,7	411298,6	170767,3	41343,0	124966,9	59022,9	96346,1	37563,50



Export of granulated pulp in terms of CY 2010-2018 and main importers, t

Countries	2010	2011	2012	2013	2013	2014	2015	2017	2018
Bulgaria								22,0	
Great Britain		3488,8	6121,6	18244,4	6385,8				417,41
Vietnam									56,00
Spain	2845,9		6029,6	2989,6		3169,1	17685,6	14457,3	
Italy	2706,4	5250,0	19798,6	3656,0		4039,6			15655,41
Ireland									7839,72
Lithuania	6506,8	480,6	10756,5	8532,8	908,2	3682,6	718,9	5170,0	4796,56
Latvia	2085,2							1494,5	3842,74
Netherlands		251,9	1184,6					1,3	15820,40
Poland		4114,5		1736,1	12455,4	47772,5	27805,8	28052,3	17914,08
Romania							22,0		
Slovakia						2211,7			
South Africa									19,40
Taiwan (China)									200,00
Turkey	11435,0	10381,5	11651,2	10212,3		3300,0			
Malta									25,36
Moldova								43,4	
Israel		2000,0						32,3	
Cyprus	698,7	3260,5	1823,4		1514,5				
Morocco	5160	10230,0	11969,7	27731,4				10007,9	
South Korea			2796,1	16089,6	16899,7	11489,9	12798,1	18080,5	20652,19
China					47,0			14602,9	15682,69
Lebanon					3296,2	2996,2			
Japan						1919,7	1921,8	2009,9	4984,89
Greece							4964,9		
Thailand							116,4		
Denmark								2779,3	
Sweden								3000,0	
Kuwait								56,2	
UAE									771,62
Hong Kong (China)									537,00
Peru								224,6	
TOTAL	31437,5	39457,8	72131,3	89192,2	41506,7	80581,1	66033,5	99978,2	109215,469

EXPORT





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NATIONAL ASSOCIATION OF SUGAR PRODUCERS OF UKRAINE

MOLASSES PRODUCTION
HARVEST FACTORIES
EXPORT BEETS % %
SUGAR