World Association of
Beet and Cane Growers

NEWS FROM WABCG

JUNE 2026

EDITO

How wonderful that we will be meeting up in a few days' time in Helsingborg, in Northern Europe, thanks to the kind invitation from Betoldarna, our Swedish member!

This will be an opportunity to come together for three days of work, featuring eight working sessions and a field visit. The topics are varied, and I hope they will inspire you. We have put a lot of thought into them.

Firstly, we will be working on sugar organisation and sugar policies. Following an overview of the sugar industry in Northern and Eastern Europe, we have chosen to place particular emphasis on public policy, comparing the approaches of Europe, the US, the UK and Brazil.

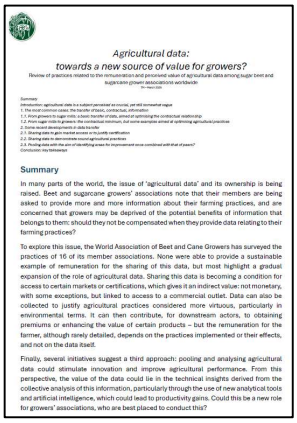
On the technical side, we have selected two key topics: energy and water. As for energy, we will look at how our sector can minimise its impact, using an example of synergy between the sugar sector and the Swedish forestry sector, but also how it can help create carbon-free energy. As for water, this is obviously a fundamental issue everywhere in the world: we will examine the challenges surrounding this issue from the perspective of growers in Sweden, Morocco and Eswatini.

Finally, in the areas of marketing and management, we will be looking at two key themes: consumer behaviour, with inspiring local examples, and generational renewal. We will explore these topics in greater depth during our field trip.

I'm really looking forward to seeing you all in a few days' time. Have a safe flight, everyone!

Owen Menkens, President
WABCG

Agricultural data:
towards a new source of value for growers?



Agricultural data:
towards a new source of value for growers?

Review of practices related to the remuneration and processed value of agricultural data among sugar beet and sugarcane grower associations worldwide

Summary

In many parts of the world, the issue of 'agricultural data' and its ownership is being raised. Beet and sugarcane growers' associations note that their members are being asked to provide more and more information about their farming practices, and are concerned that growers may be deprived of the potential benefits of information that belongs to them: should they not be compensated when they provide data relating to their farming practices?

To explore this issue, the World Association of Beet and Cane Growers has surveyed the practices of 16 of its member associations. None were able to provide a sustainable example of remuneration for the sharing of this data, but most highlight a gradual expansion of the role of agricultural data. Sharing this data is becoming a condition for access to certain markets or certifications, which gives it an indirect value: not monetary, with some exceptions, but linked to access to a commercial outlet. Data can also be collected to justify agricultural practices considered more virtuous, particularly in environmental terms. It can then contribute, for downstream actors, to obtaining premiums or enhancing the value of certain products – but the remuneration for the farmer, although rarely detailed, depends on the practices implemented or their effects, and not on the data itself.

Finally, several initiatives suggest a third approach: pooling and analysing agricultural data could stimulate innovation and improve agricultural performance. From this perspective, the value of the data could lie in the technical insights derived from the collective analysis of this information, particularly through the use of new analytical tools and artificial intelligence, which could lead to productivity gains. Could this be a new role for growers' associations, who are best placed to conduct this?

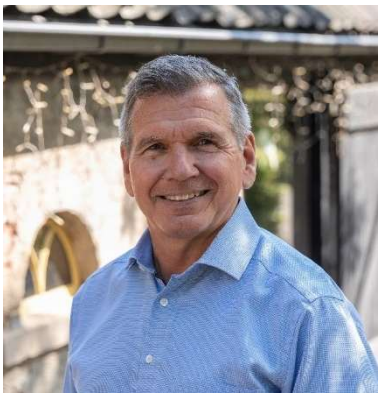
The issue of 'agricultural data' and its ownership is being raised: should growers be compensated when they provide data relating to their farming practices? To explore this issue, the WABCG has surveyed the practices of 16 of its member associations – and here are the results!

Ask the Secretariat to receive a copy!

WABCG meeting
16-18 June 2026
Helsingborg, Sweden

News from Netherlands

Regarding the 2025 campaign, the average sowing date was 26 March, one month earlier than in 2024. Following sowing, conditions remained dry, prompting irrigation on several fields to support crop emergence. Strong winds caused wind erosion damage in various locations, necessitating re-sowing. By late April, additional damage—partly caused by larvae—was observed, resulting in further re-sowing. In total, approximately 1,000 hectares required re-establishment. Overall growing and harvesting conditions were excellent, with the exception of certain areas in the Southwest affected by drought. Sugar yield matched the record year of 2017. The average sugar yield reached 15.5 tonnes per hectare, the highest in years and above the five-year average (14.5%). The average root yield was 91 tonnes per hectare with a sugar content of 17.1%. For standard-quality delivered sugar beets (17% sugar content and 91 extractability), the member bonus amounted to €5.00 per tonne, resulting in a member price of €40.00 for 2025—a further decrease compared to 2024 (€47.25). The member price per tonne for average delivered quality in 2025 was €40.45 (2024: €43.52). This decline is directly linked to the deterioration of the European sugar market since mid-2024. As a result, earnings from our sugar activities have been under pressure since the second half of 2024, and this trend has continued into 2025 and 2026.



Regarding 2026 campaign, sowing began in March, with good germination on the early fields. Most of the crop was sown in April. Due to dry periods, irrigation was applied to ensure uniform emergence. The average sowing date was 9 April, close to the five-year average of 10 April, but 14 days later than in 2025 (26 March). By mid-May, 440 hectares required re-sowing due to soil crusting and feeding damage, primarily caused by leatherjackets and wireworms. During the second and third weeks of May, most regions received substantial rainfall. Given the favourable spring conditions, the expected sugar yield is around 14 tonnes per hectare, although the season still has a long way to go.

Sustainable success for Cosun begins with ensuring profitable beet cultivation for our growers. The importance of sustainability continues to increase, with consumers demanding transparent information about climate impact and setting clear expectations.

These developments may at times conflict with economic viability. Through the ***Future Proof Farming*** (FPF) programme, we are committed to building a resilient and sustainable sugar beet sector. Our objective is to ensure that growers can continue cultivating sugar beets profitably in the years ahead—after all, without beets, there is no sugar. Achieving this requires deliberate choices: cultivation measures and grower-specific actions supported by realistic market-based compensation. The FPF programme for sugar beets was launched this spring, making 2026 an important preparatory year. With an average sowing date, the growing season is now well underway. At the end of April, we held the first FPF kick-off meetings. Growers from the North and Southwest met at two Inspiration Farms, where engagement was high and discussions lively. Specialists and growers explored the central question: how can we significantly reduce CO_2 emissions in beet cultivation? The conclusion was clear: most soil-related emissions can be reduced through improved fertilisation strategies. The two grower groups—one on sandy soils, the other on clay—quickly discovered how differently certain measures apply depending on soil type, sparking valuable insights and constructive debate. Looking ahead to the 2027 rollout, it is evident that measures must be further refined and tailored to soil type. The ambition is substantial: a 30% reduction in CO_2 emissions compared with 2022, achieved through real, measurable reductions in the field. Following the first round of meetings, confidence is strong that these positively critical groups can achieve this with the right commitment. The next steps include the summer meeting in June and the winter meeting in November. Together with these motivated growers, we will continue shaping a robust, future-ready plan for 2027.

Following the signing of the tailor-made agreement between Cosun and the Dutch State on 18 December 2025, Cosun is taking concrete steps to further future-proof its production processes. The agreement includes targeted investments aimed at reducing energy consumption, CO_2 emissions, and nitrogen emissions. These investments align directly with the *Future-Proof Sustainable Chain* pillar of our Unlock 30 strategy.

A central component of the agreement is the **V-RISE project** at the Cosun Beet Company site in Vierverlaten. V-RISE (Vapour Recompression Improved Sugar End) focuses on electrifying the factory and significantly reducing energy use and CO_2 emissions in the production process. Key measures include the reuse of residual heat and the installation of vertical crystallisation towers. V-RISE represents the largest investment in Cosun's history. As part of the agreement with the Dutch State, the project has been awarded substantial investment subsidies. Once operational, V-RISE will make a major contribution to Cosun Beet Company's sustainability ambitions. The project is expected to significantly reduce CO_2 emissions, decrease natural gas consumption and lower overall energy use.

Maarten Boudesteijn, Dir. Cooperative Affairs
Royal Cosun, Netherlands

News from Nicaragua

In Nicaragua, located in Central America, the harvest season begins in mid-November and ends in mid-May. The **2025-2026** harvest saw a considerable reduction in yield (metric tons per hectare) compared to the 2024-2025 harvest.

The rainy season, which runs from May to November, was characterized by low rainfall, with some areas experiencing more than 50 days without rain during July and August. This period coincides with the peak growth stage of the sugarcane.

Producers experienced a decrease in agricultural production from 97.04 metric tons per hectare in the 2024-2025 harvest to 92.41 metric tons per hectare in the 2025-2026 harvest, representing a reduction of 4.77%. In contrast, industrial yield increased from 101.54 kg sugar per metric ton in the 2024-2025 harvest to 107.82 kg sugar per metric ton in the 2025-2026 harvest, an increase of 6.22%. The reality is that climate variability is affecting us, making agricultural yields more difficult to predict.

Prices, as shown in the table (in US dollars, below), were slightly lower, decreasing by 11% compared to the previous year.

Results 2025-2026

ZAFRA	INGENIO	PROPIA-PROVEEDORES	AREA HA	TM DE CAÑA/HA	TM DE CAÑA	KG AZ/TMC	TM AZUCAR/HA
2025-2026	SER-SAN ANTONIO	INGENIO	16,261.00	108.78	1,768,834.00	110.35	12.00
2025-2026	SER-SAN ANTONIO	PROVEEDORES	12,870.00	92.85	1,194,949.00	104.65	9.72
2025-2026	Total SER-SAN ANTONIO		29,131.00	101.74	2,963,783.00	108.05	10.99
2025-2026	PANTALEON-MONTE ROSA	INGENIO	11,168.76	104.35	1,165,440.89	106.95	11.16
2025-2026	PANTALEON-MONTE ROSA	PROVEEDORES	15,502.36	92.04	1,426,869.01	110.48	10.17
2025-2026	Total PANTALEON-MONTE ROSA		26,671.12	97.20	2,592,309.90	108.89	10.58
Total 2025-2026			55,802.12	99.57	5,556,092.90	108.44	10.80

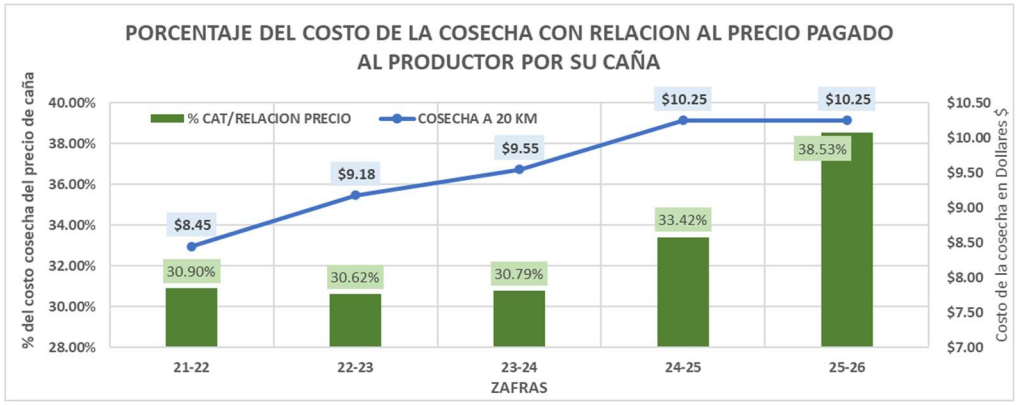
Price Table for sugarcane to the producer at the mill

INGENIO	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
MONTE ROSA	$27.85	$29.64	$31.75	$29.67	$26.96
SAN ANTONIO	$27.35	$29.98	$31.02	$30.67	$26.83
Total general	**$27.60**	**$29.81**	**$31.39**	**$30.17**	**$26.89**

Regarding production costs, herbicide prices remained similar to the previous year, fertilizer prices increased, and harvesting costs rose by 3%. The following two tables illustrate how this is impacting the profitability of sugarcane cultivation in Nicaragua.

In Nicaragua, fertilization is primarily based on nitrogen. The graph shows prices of urea (46%) in US dollars.

Costs have been rising and prices depressed; we need to look at where we can save money and increase production to survive these difficult years. Indeed, the following graph shows the increase in the cost of the harvest per campaign (Lines), and what that harvest cost represents of the price of the cane paid to the producer (bars) : almost 39 % of the cost of production is now the cost of harvesting.



We wish you success at the upcoming meeting in Helsingborg and hope it serves as a valuable exchange of information for everyone.

Ing. José Antonio Mayorga, Representant
Prosecaña, Nicaragua

News from Eswatini

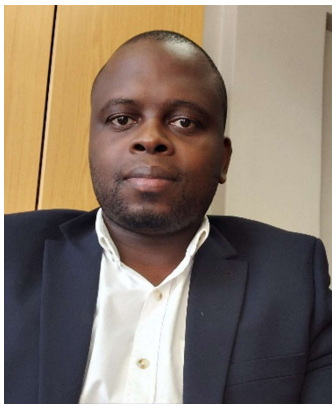
The Eswatini Sugar Industry plays a critical role in the economy of the Kingdom of Eswatini by contributing around 5% to the small nations Gross Domestic Product and

Employing in the Region of 20 000 people. The country produces between 650 000 and 700 00 tonnes of sugar. Of this amount only about 10% is consumed inside the country by the about 1.2-million population and the rest earning external revenue outside the borders.

In the past decade the Eswatini Sugar Industry has observed downward trend in profitability driven mainly by declining yields. In 2024 the industry convened a national dialogue to identify the key factors behind the undesirable trends. With regards to yields u nsatisfactory crop husbandry, declining soil quality, emerging significance of some pests and unpredictable and extreme weather patterns were fingered as the main culprits.

In addition to the declining yield component production costs and product price contribute materially to the strained profitability (see Figure on next page). Being a commodity sugar is heavily exposed to macro-economic dynamics chief among which is fluctuating global sugar prices, energy (electricity and petroleum) prices. The energy prices are particularly influential to the viability of the industry. The latest grower survey shows that petroleum and electricity contributed above 50% of the total sugarcane production costs, and growing.

Fast forward to the beginning of the current Campaign (April to November) the industry learned a lot about the Straight of Homuz and the Persian Gulf, than it did in the past decade. **In a space of one Month from April 2026 to May 2026, electricity escalated by an average 11.74% while diesel escalated by a cumulative 59%.** The 2 products by themselves resulted in a 17% increase in the total costs of producing sugarcane, if one assumes the costs be flat where they are for the next financial year. This has the potential of reducing small scale grower margins by a hefty approximately 50% year on year (see figure on next page).



The growers have limited scope in preventing global trends apart from adapting to and mitigating them. However, growers have enormous influence on the volume of sugar produced in a unit of land. While hoping and praying that some of the runaway costs escalations are temporary peaks that will be reversed the industry is focussing on strategic actions within their

sphere of control. These are summarized below:

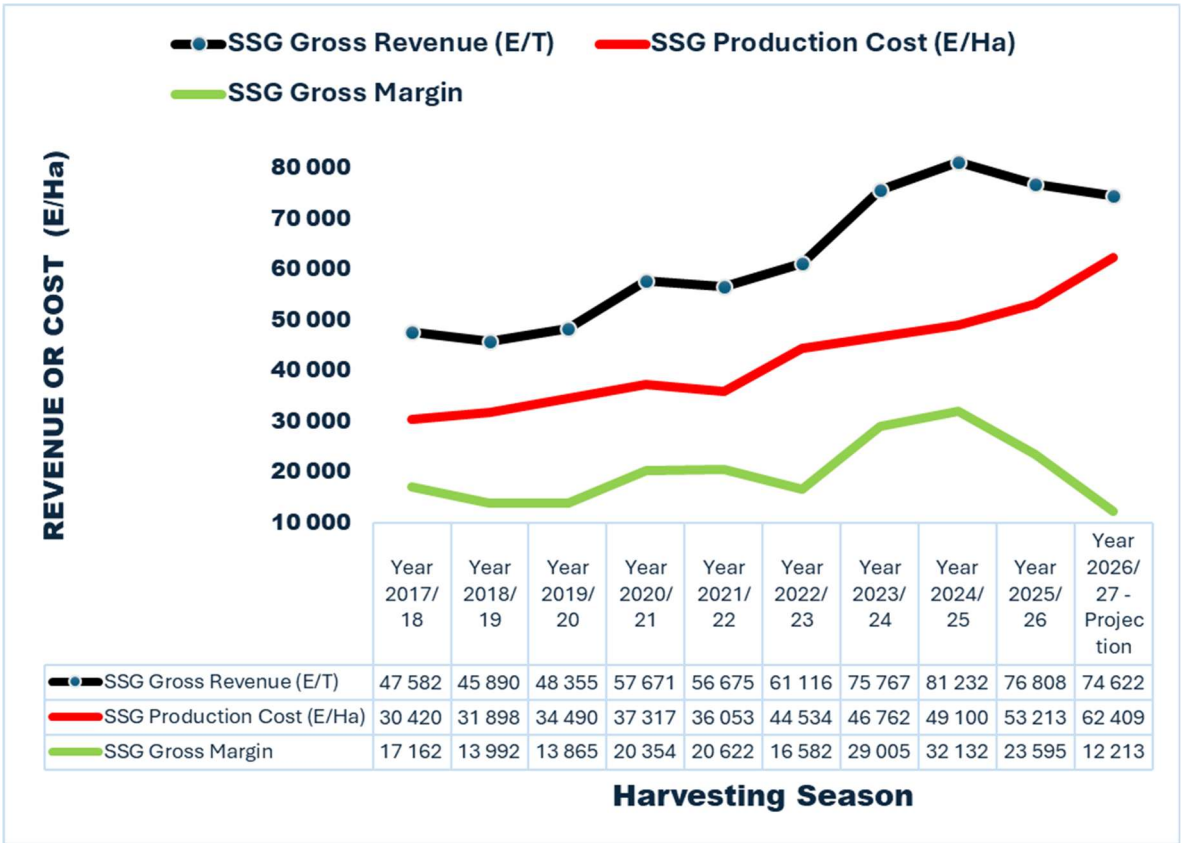
1. Establish and implement a grower yield programme (soil in the soles of our feet)
2. Modernization of decision support systems
3. Collaborative pest and disease control systems
4. Revenue diversification through promoting and aligning with, and support of inclusive value addition in the sugarcane value chain leveraging grower friendly Sugar Legislation and Sugar Industry Agreement.
5. Structured

Life happens and change is inevitable. Cane growers in Eswatini have chosen to start by looking inside themselves for resilience while exploring external rescue. The answers are there if we look hard enough and take bold steps

Dr. Sipho V. Nkambule, CEO
Mr Mxolisi V Hlophe, Grower Support Manager,
Esawtini Cane Growers Association (ECGA)

Grower Profitability Trend in Grower Margins

NB : Eswatini E = US$0.06



	Year 2017/18	Year 2018/19	Year 2019/20	Year 2020/21	Year 2021/22	Year 2022/23	Year 2023/24	Year 2024/25	Year 2025/26	Year 2026/27 - Projection
SSG Gross Revenue (E/T)	47 582	45 890	48 355	57 671	56 675	61 116	75 767	81 232	76 808	74 622
SSG Production Cost (E/Ha)	30 420	31 898	34 490	37 317	36 053	44 534	46 762	49 100	53 213	62 409
SSG Gross Margin	17 162	13 992	13 865	20 354	20 622	16 582	29 005	32 132	23 595	12 213