



NEWS FROM WABCG

EDITORIAL

In a few days, sugar beet and sugar cane growers will all be together. Once again, the WABCG family will share ideas, exchange information and ways to solve the problems we may encounter in our daily work.



It is an honour for my country that all eyes of the growers will be on the USA and I hope you will enjoy the programme we have prepared with my team.

And I am proud, as President of this fantastic association, to welcome you all to my farm at the end of our 2-day conference: our delegation will include almost 70 participants from 17 countries, from Kenya to Austria, via Australia and Nicaragua...

I will do my best, together with the team of the Red River Valley Sugarbeet Association, to make these days feel like a family reunion - this is the feeling I always have when we get together, not only to see colleagues, but also friends - and cousins!

See you soon!

**David Thompson, President
WABCG**

JUNE 2024

NEWS FROM ESWATINI

The Eswatini sugar industry history can be traced back to the late 1950s when external British companies, LONRHO and Commonwealth Development Corporation (CDC) set up raw sugar mills and sugarcane fields using the Usuthu and Komati Rivers, respectively. The key objective was to supply sugar to the British Empire, hence export oriented from the start. The corporate entities were supported by a handful of independent large corporate farms. In the early 1960s the need to involve indigenous communities in the business was heeded hence establishment of Vuvulane Irrigated Farms (VIF) in the northeast of the country. The project comprised small scale farms no more than 4-Ha per family. Over the years the Eswatini Govern-



ment with support from cooperating partners such as the European Union, have expanded indigenous participation through construction of 2 big dams and downstream development areas. As a result of the existing skill/experience, infra-

structure and efficient marketing structure, sugarcane has emerged as an unrivalled anchor crop for new irrigation schemes. At the time of writing sugar production is in excess of 600 000 tonnes produced on about 60 000 ha. The local country consumption is less than 10% of the output. The rest earns much needed foreign exchange.

Over the years the small-scale cane grower cadre has grown to over 450 entities ranging from the small-scale family holdings to consolidated community owned holdings, contributing about 29% of area under production. This move has significantly improved the employment opportunities for the youth in the local communities and created other spinoff businesses. Simultaneous with these developments there

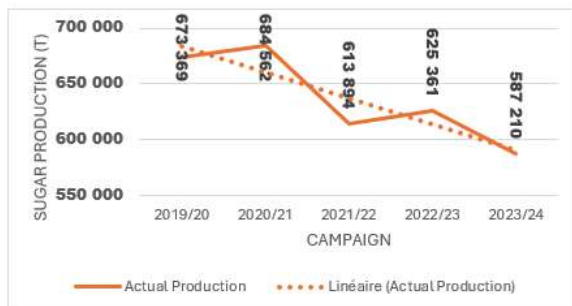


is increasingly acquisition of privately owned large corporate farms by millers. The merging of large-scale farmers with mills does present some new challenges to the new small growers. One major challenge being the erosion of skills/mentorship and resource capacity from the Grower Association thus isolating the vulnerable small-scale growers. If not redressed the transformation may have the unintended effect of weakening the grower bargaining capacity leading to failure of noble initiative. The Eswatini Cane Growers Association (ECGA) is campaigning for and advocating additional support to complement the grower levy funding model to more structured support by the industry.

Other changes challenging the industry include climate change. The evidence of climate change is seen through increasingly unpredictable sugar production environment. For the past 5-years the yields have been going down due to declining radiation, excessive rains during harvest (extended season), and increasing incidents of previously insignificant pests, such as the yellow leaf sugarcane aphids. New and innovative thinking encompassing adaptive and mitigating technologies is warranted.

general and solar powered irrigation systems in particular. At the time of writing about 30 growers have installed solar plants, potentially contribution about 7.4 MW of installed power. It is pleasing to note that local commercial Banks are warming up to the idea of financing small-scale embedded generation plants; (2) promoting good irrigation scheduling using various tools aimed at improving water management at field level; (3) advocating for the construction of additional water storage dams that can potentially benefit the sugarcane industry.

Dr Sipho V Nkambule, CEO
Eswatini Cane Growers Association (ESGA), Eswatini



Past Five-Year Sugar Production Trends



Lodged Cane Following out of Season Windstorm in March 2024

The industry is entirely reliant on electricity for irrigation (8 500 kWh / ha / yr) of which about 80% is thermal energy imported from neighbouring countries. The tariff increases are increasingly painful to growers. The ECGA and the industry are actively promoting a number of initiatives to keep the industry sustainable, including (1) a transition to renewable energy in

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.



NEWS FROM NICARAGUA

In Nicaragua, the sugar harvest takes place in the months from November to May. The 2023-2024 harvest recently ended.

The results of the agricultural performance of the member producers of our association were higher in this 2023-2024 harvest (106.51 tmc/ha) than in the 2022-2023 harvest (99.66 tmc/ha).



On the other hand, industrial performance (sugar production), was lower 2023-2024 harvest (100.26 kgaz/tmc) compared to the previous 2022-2023 harvest (103.35 kgaz/tmc), due to the poor distribution of precipitation during winter of 2023.

These precipitations were higher at the end of winter (starting harvests), activating cane growth when it was already in the process of maturity. Also causing late tilling (suckers) in batches to harvest, resulting in high yield and low sugar content.

Figures of the 2023/2024 campaign

INGENIO	Propiedad	Área Has	TMC/HA	KGAZ/TMC	TM/AZ/HA
SAN ANTONIO	PROPIO	16,633.44	123.63	99.81	12.34
SAN ANTONIO	PROVEEDORES	12,744.12	105.82	97.71	10.34
Total SAN ANTONIO		29,377.56	115.90	98.98	11.47
MONTE ROSA	PROPIO	13,795.45	107.78	101.15	10.90
MONTE ROSA	PROVEEDORES	13,294.68	107.18	102.68	11.00
Total MONTE ROSA		27,090.13	107.48	101.90	10.95
Total general		56,467.69	111.86	100.32	11.22

Figures of the 2022/2023 campaign

INGENIO	Propiedad	Área Has	TMC/HA	KGAZ/TMC	TM/AZ/HA
MONTE ROSA	INGENIO	14,060.77	100.48	103.33	10.38
	PARTICULARES	13,159.60	99.01	102.20	10.12
Total MONTE ROSA		27,220.37	99.77	102.79	10.25
SAN ANTONIO	INGENIO	16,313.12	100.69	107.31	10.81
	PARTICULARES	12,353.36	100.36	104.56	10.49
Total SAN ANTONIO		28,666.48	100.55	106.13	10.67
Total general		55,886.85	100.17	104.51	10.47

We thank God for the price increase and the positive yield outcome. With this, producers have obtained more income, therefore having the ability to give better care to their crop next year.

Cane prices since 2021

INGENIO	2021-2022	2022-2023	2023-2024	INCREMENTO
MONTE ROSA	\$27.85	\$29.64	\$31.91	7.67%
SAN ANTONIO	\$27.35	\$29.98	\$31.22	4.14%
Total general	\$27.60	\$29.81	\$31.56	

APRICO, every year, holds a fertilizer tender for all sugarcane producers, regardless of the size of the area, managing to obtain a good price for the fertilizers, this being a saving of \$10 dollars bag (46%N) urea according to the price from the market, (market price: \$34.00, price achieved by APRICO: \$23.99 per bag of urea (46%N).

In our country, the use of drones in agriculture are not allowed, so we have had to resort to platforms that provide satellite images in NDVI. This practice is helping us to visualize critical and specific points, as well as the analysis of NDVI throughout the years. To compare them and be able to determine if this year we are better or if we should improve.

APRICO, in coordination with the mills, is holding meetings for improvements in the crop, such as herbicides, new varieties, in order to make the crop more profitable.

José Antonio Mayorga, President
Asociación de Productores privados de Caña de Azúcar de Occidente (APRICO), Nicaragua





NEWS FROM THE NETHERLANDS

2023 campaign

It seems that after each year we must say that the previous year was special. Indeed, 2023 was such a year. Spring was cold and wet, resulting in late sowing. The average sowing date was April 26. During the summer of 2023 we were hopeful as the growth curve of sugar beets seemed to recover due to sunny weather. However, fall disappointed us with high temperatures and heavy rain. This resulted in low sugar percentages and mineralization. In addition, we got severe frost during winter, which caused challenges and delays in the sugar factory. At the end, 300 hectares could not be harvested.



Overall, the 2023 campaign resulted in a very low average sugar content of only 15,6%, compared to a 10-year average above 16,5%. The average plant yield was still acceptable at 86,1 tons, resulting in a sugar yield of 13,5 tons per hectare.

Fortunately, the beet price reached a record high at 78,00 € per ton at standard 17% sugar content. As a result, our members achieved reasonable financial revenue per hectare. The high beet price is the result of increasing market prices and the modification that links the beet price prospectively to the sales season (instead of retrospectively in years before 2022/23). However, this benefit may reverse if sugar prices decline.



2024 campaign

Spring 2024 was again cold and wet and caused a very late start. Sowing is not yet fully completed. This is reflected in the projected yield numbers for 2024/25 (about 13,0 tons of sugar per hectare). There are concerns about whether the last 4.300 hectares can be sown and what the impact of all the rain will be on the total acreage. The board of Cosun has expressed its concerns to the members of the cooperative and has provided some comfort regarding the impact on individual members.

Growers Platform

With the Growers Platform "Groeikracht Cosun", Cosun is combining the knowledge of our growers and seeking contact with research institutes, government agencies, and innovators.

Soil and water quality

Cosun initiated initiatives last year to monitor water quality and meet the objectives of the European directive on water quality. Not meeting objectives may cause severe consequences, including cultivation stops in specific regions (sand & loam soils). Cosun's initiative includes free N-mineral soil sampling for its growers and based on that, they specifically advise and facilitate growers. For example, by giving a nitrogen-based advice on the following crop. In addition, the data collected through the samplings can also substantiate Cosun's position in discussions with the government on status and consequences.

Plant health and protection

Cosun has carried out an analysis of the loss of various crop protection products. Cosun is currently working on alternatives if these resources are withdrawn. Examples include the ICM method, mechanical weed control, precision techniques and resistant varieties. This year, Cosun will pilot the use of 10 Farm droids in chicory cultivation as a pilot to gain more practical experience with this type of machine.

Climate and energy

Cosun acknowledges that greenhouse gas emissions put pressure on our climate. Reducing the use of fertilizers and energy and minimizing nitrogen oxide emissions are important tasks. Cosun is investigating how we can grow a profitable cultivation with as little CO2 emissions as possible.

Inspiration Farms

To share knowledge and demonstrate ready-to-use solutions on the three themes mentioned above, Cosun has opened so-called inspiration farms. In 2025 four will be operational in The Netherlands. Together with our growers we can demonstrate and discuss the latest techniques and technologies on these farms.

Maarten Boudesteijn, Director Cooperative Affairs
Royal Cosun,, The Netherlands