25.2.2025

# Growing sugar beet in Europe: challenges and new paths for resilience

UNITING BEET GROWERS
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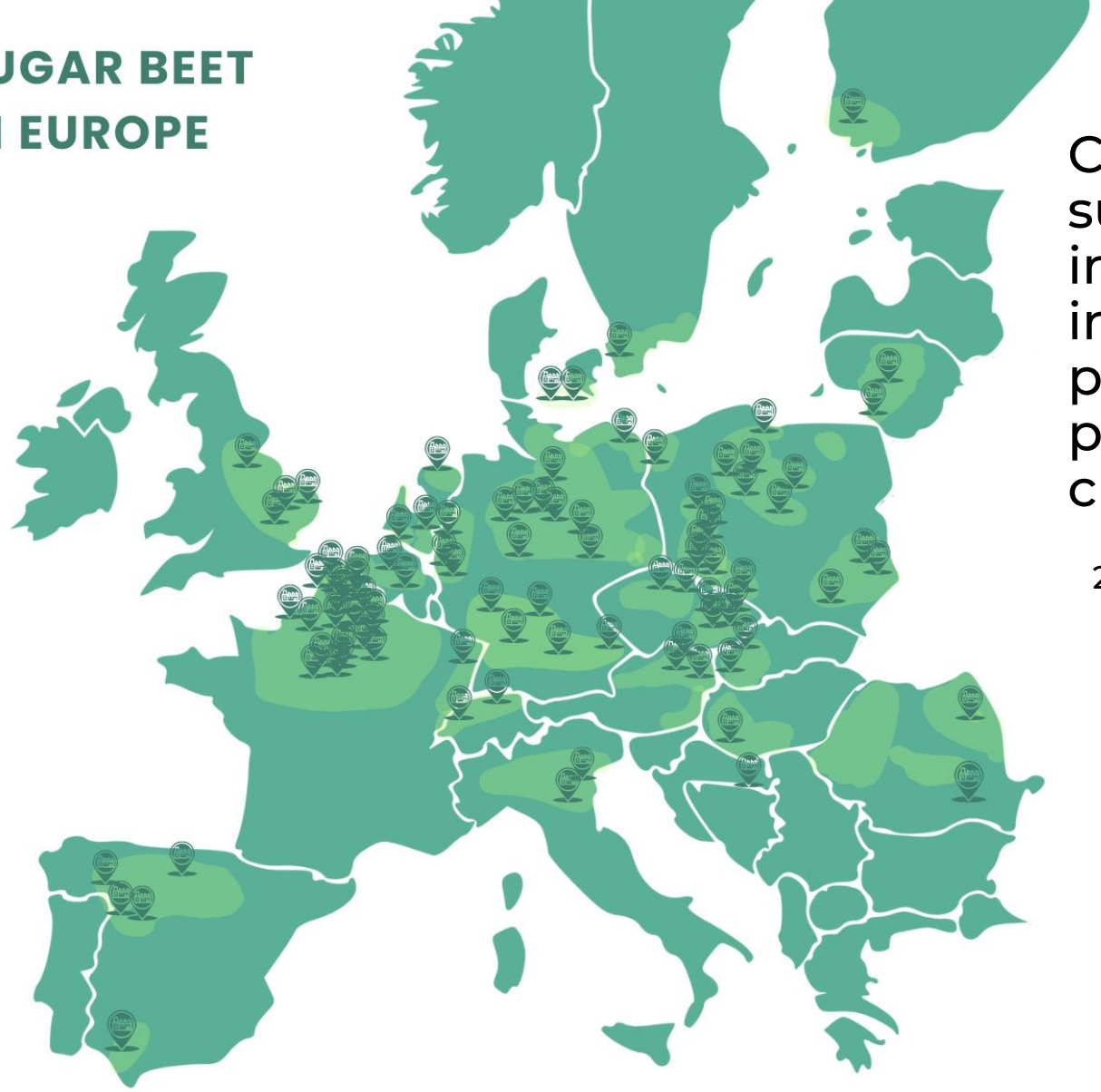
since 1927

**Elisabeth Lacoste (Director)**

43rd Biennial Meeting of the American Society of Sugar Beet Technologists
24-27 February 2025 – Long Beach, California

# SUGAR BEET IN EUROPE



100 000 Farmers

Sugar Factories

Sugar Beet Area

UNITING BEET GROWERS
CIBE since 1927

## CIBE represents & defends sugar beet growers' interests at European and international level & promotes technical progress in sugar beet cultivation

23 MEMBERS regional or national beet growers' associations

Germany, Austria, Belgium, Czech Republic, Denmark, Finland, France, Hungary, Italy, Netherlands, Poland, Romania, Slovak Republic, Sweden

+ United-Kingdom & Switzerland

A SECTOR WITH AN IMPORTANT ECONOMIC WEIGHT IN THE EU

100 000 GROWERS

1.5 MILLION HECTARES
WORLD'S 1ST BEET SUGAR PRODUCER
(around 16 millions tonnes sugar)

World's 7th largest sugar importer (~2.5 million tonnes, 75% from developing and emerging countries)

World's 2nd largest sugar consumer

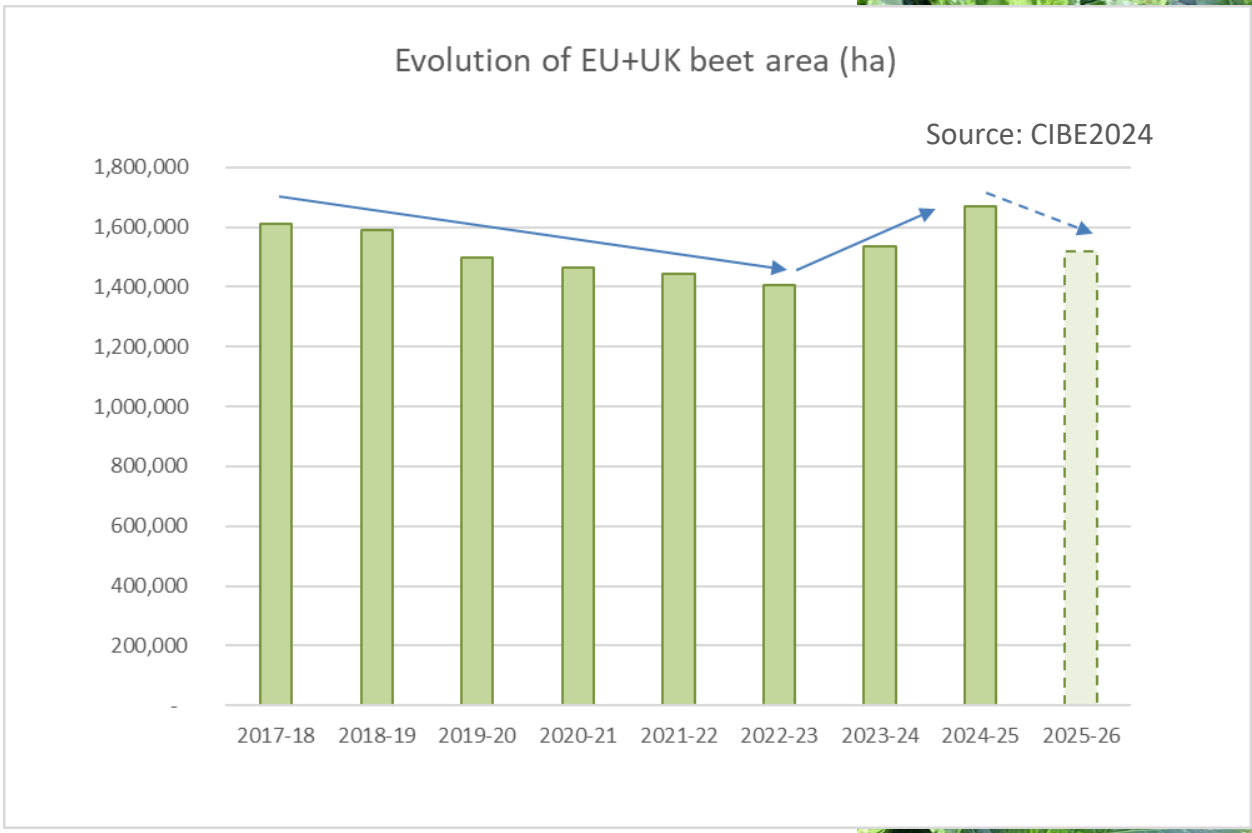
World's 4th largest ethanol producer

# Evolution of EU sugar beet acreage: downward trend despite recent rebound

- Good price perspectives in 2023/24 have allowed EU sugar beet acreage to rebound after 5 years of decrease

- But the response form the EU sugar beet sector is far from lasting and beet acreage is likely to fall back: first announcements by EU sugar companies envisaged a 6% to 15% decrease in acreage in 2025/26

- Why ? Several reasons: from extreme weather patterns and politics to market fundamentals



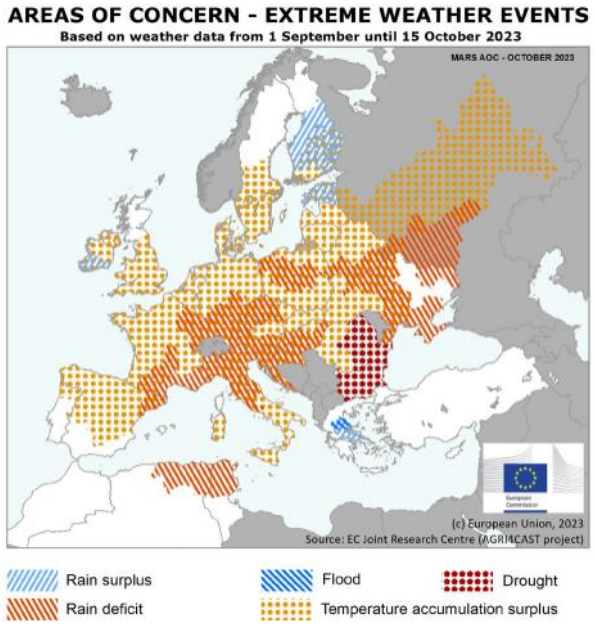
1. NEW CONDITIONS OF CULTIVATION: from environmental issues (climate change) to new conditions for crop protection

2. HOW TO DEPOLARIZE THE POLICY DEBATE AND RESPOND ?
   Rebalancing the EU Green Deal

# 1. NEW CONDITIONS OF CULTIVATION: from environmental issues (climate change) to new conditions for crop protection

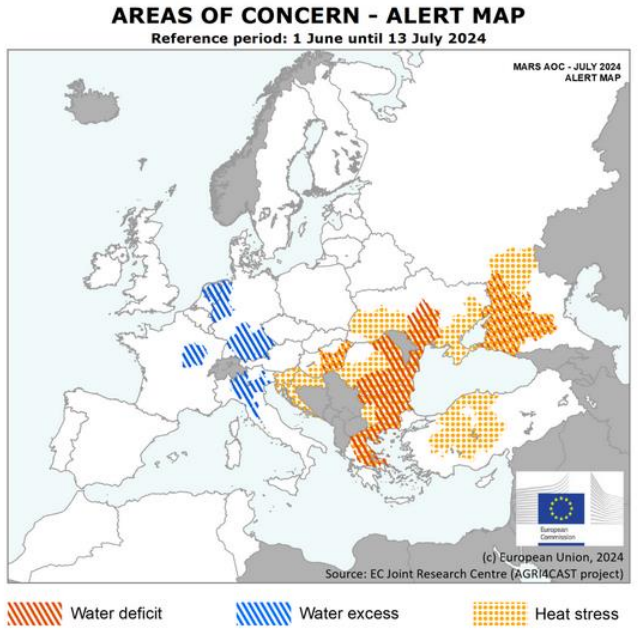
# Climate change


*The European continent has been warming twice as fast as the global average since the 1980s, becoming the fastest-warming continent on Earth.*
*2024 was the warmest year on record for Europe. The 2024 temperature is 1.47°C above the average for the 1991–2020 reference period, and 2.92°C above the 1850–1900 level.*



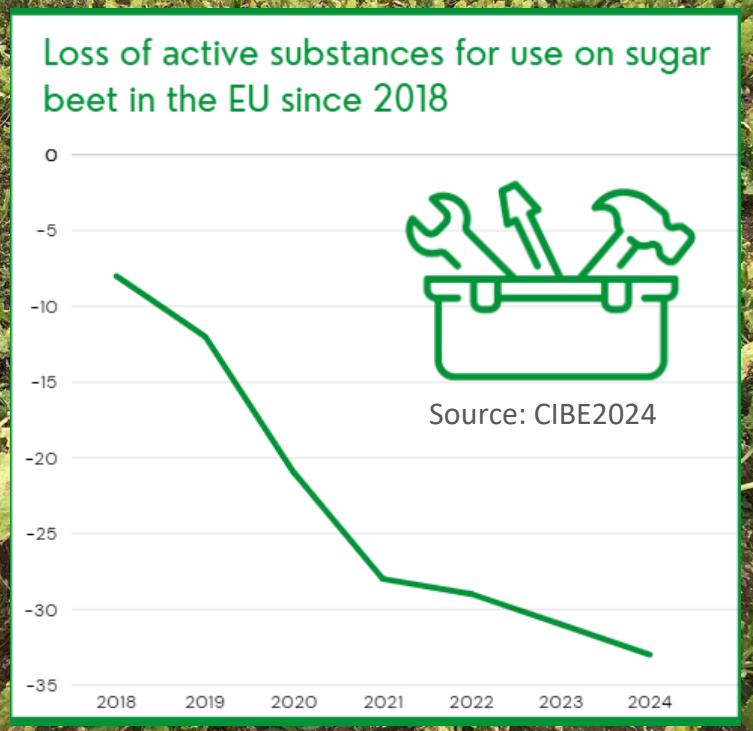

**Succession of sugar beet campaigns with extreme weather patterns** in Northwest Europe, continental Europe and Southern Europe:

- **extreme heat waves and droughts** (in summer 2023 and 2024, when large parts of southern-central and south-eastern Europe, experienced several weeks with max. temperatures close to 40°C) or
- **extreme rainfalls** (water excess the Netherlands, western and southern Germany, north and central France, and northern Italy in summer 2024)




2024 was the wettest year in Belgium since meteorological records began in 1833
The total annual rainfall was over 1,200 mm (over 205 days of precipitation!)

# A depleting toolbox to protect the crop




- Sugar beet growers in the EU have **lost over 35 active substances (A.S.) used in plant protection products (PPPs) since 2018,** the most recent loss being the key herbicide (HB) A.S. triflusulfuron
- **Less than 10 "newcomers" – and 3 of them are already out (or on their way out)**
- **Emergency authorizations for non-authorized A.S. no longer possible for prohibited A.S. (such as neonicotinoids)**; for others, there are differences between Member States
- **EU Farmers are becoming increasingly deprived of effective tools to protect sugar beet against harmful organisms** (weeds, pests and diseases)
- Managing **resistance** is becoming an issue
- Risk of **crop failures** (with up to 70% yield loss) is increasing

# The implementation of the EU regulatory framework is stifling innovation in crop protection & threatening EU agriculture

**In a context of increased civil society engagement and advocacy, the EU approval process for A.S.s in chemical PPPs has not only become the strictest …**

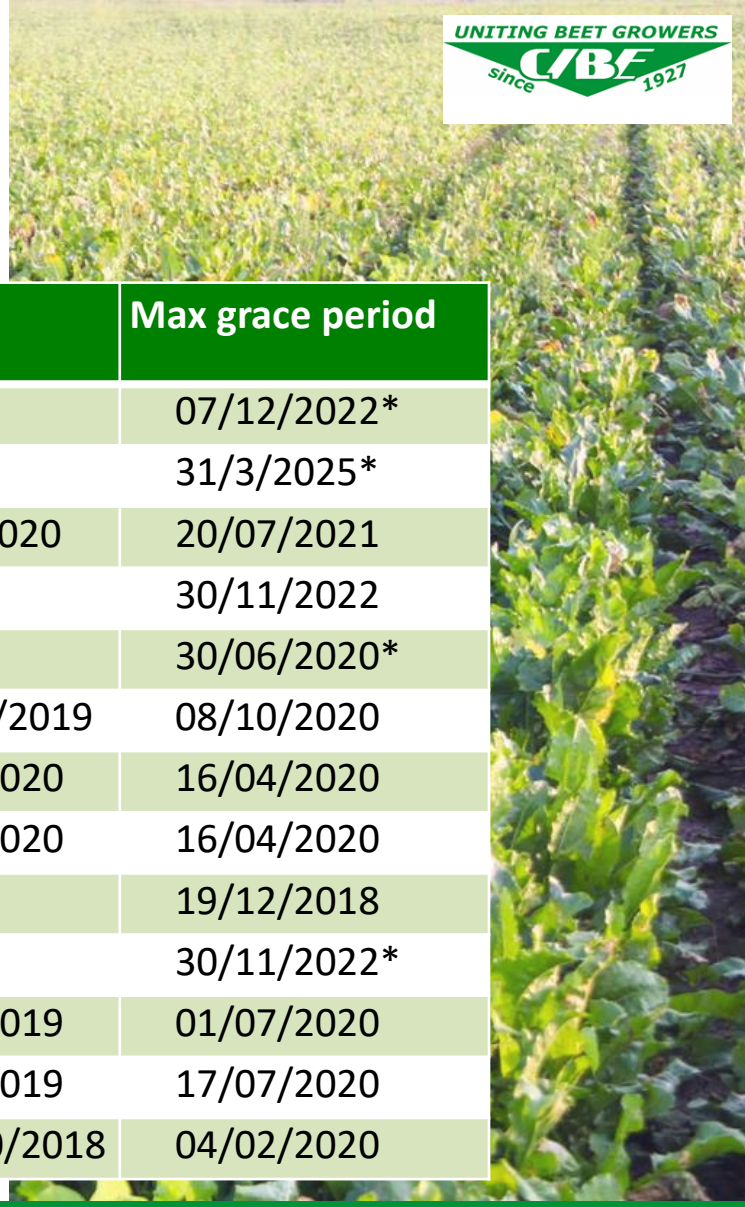
- **Strict approval criteria for A.S.** (laid down in Regulation (EC) No 1107/2009)
- Based on the **precautionary principle** (part of the EU Treaty)
- **Procedural steps are highly regulated and adapting to new additional and restrictive criteria** (ex. new hazard criteria, endocrine disrupting properties, risk assessments on pollinators, on birds & mammals, labelling & packaging…) and implemented with an **extreme interpretation of the precautionary principle** (‘hazard’ replaced ‘risk’).
- Approval of an A.S. is valid for **15 years maximum and** needs to be **reviewed periodically** (e.g. new scientific findings can trigger an “early review”).
- Legal **court cases** initiated by NGOs are increasing

# The implementation of the EU regulatory framework is stifling innovation in crop protection & threatening EU agriculture

**… but likely the most expensive and not encouraging in terms of innovation**

- Developing a new A.S. for approval in the EU nowadays takes over **10 years**
- Cost associated are high, return on innovation investment in EU is lower compared to the rest of the world
- Fewer new chemical A.S. approvals and delayed EU authorisations compared to the rest of the world
- Phytopharmaceutical companies are pushed to invest and to request authorization for A.S. outside the EU

# The emptying crop protection toolbox: lost Active Substances (A.S.) Part 1.



| Active substance | Reason for loss | Max grace period |
|---|---|---|
| 1- Alpha-Cypermethrin (IN), CfS | No renewal sought. Approval expired 07/06/2021 | 07/12/2022* |
| 2- Bacillus firmus I-1582 (NE) | No renewal sought. Approval expired 30/09/2023 | 31/3/2025* |
| 3- Beta-Cyfluthrin (IN) | Non-renewal of approval voted in SCoPAFF. CIR published 29/6/2020 | 20/07/2021 |
| 4- Carboxin (FU) | No renewal sought. Approval expired 31/05/2021 | 30/11/2022 |
| 5- Chloridazon (HB) | Approval (revoked by applicant) expired 31/12/2018 | 30/06/2020* |
| 6- Chlorpropham (HB)** | Non-renewal adopted by COM (no opinion in AC). CIR publ. 18/6/2019 | 08/10/2020 |
| 7- Chlorpyrifos (IN) | Non-renewal of approval voted in SCoPAFF. CIR published 13/1/2020 | 16/04/2020 |
| 8- Chlorpyrifos-methyl (IN) | Non-renewal of approval voted in SCoPAFF. CIR published 13/1/2020 | 16/04/2020 |
| 9- Clothianidin (IN)*** | Ban on outdoor use imposed, no renewal sought | 19/12/2018 |
| 10- Cyproconazole (FU) | No renewal sought. Approval expired 31/05/2021 | 30/11/2022* |
| 11- Desmedipham (HB) | Non-renewal of approval voted in SCoPAFF. CIR published 28/6/2019 | 01/07/2020 |
| 12- Dimethoate (IN), CfS | Non-renewal of approval voted in SCoPAFF. CIR published 27/6/2019 | 17/07/2020 |
| 13- Diquat (HB), CfS | Non-renewal adopted by COM (no opinion in AC) CIR publ. 15/10/2018 | 04/02/2020 |

* When an approval simply expires, the maximum grace period which can be granted by a MS cannot exceed 18 months.
** at the time, this AS was not yet approved for use in sugar beet, but in the process of being approved for use in sugar beet in at least 1 key beet-growing MS.
*** Approval expired 31/01/2019, applicant decided not to apply for renewal of approval.
CfS = Candidate for Substitution//CIR = Commission Implementation Regulation//SCoPAFF = Standing Committee on Plants, Animals, Food and Feed
AC = Appeal Committee//COM = Commission//MS = Member State

# The emptying crop protection toolbox: lost A.S. Part 2.

| Active substance | Reason for loss | Max grace period |
|---|---|---|
| 14- Epoxiconazole (FU), CfS | Approval (revoked by applicant) expired 30/4/2020 | 30/10/2021* |
| 15- Fenpropimorph (FU) | No renewal of approval not applied for. Approval expired 30/4/2019 | 30/10/2020* |
| 16- Flutriafol (FU) | Approval expired 31/5/2021 | 30/11/2022* |
| 17- Gamma-cyhalothrin (IN), CfS | Applicant has decided not to apply for renewal of approval. | 30/09/2026* |
| 18- Haloxyfop-P (HB), CfS | No renewal sought. Approval expired 31/12/2020 | 30/06/2022* |
| 19- Imidacloprid (IN)** | Ban on outdoor use imposed, no renewal sought | 19/12/2018 |
| 20- Indoxacarb (IN) | Applicant withdrew application for renewal of approval. | 19/09/2022 |
| 21- Mancozeb (FU) | Non-renewal of approval voted in SCoPAFF. CIR published 15/12/2020 | 04/01/2022 |
| 22- Metalaxyl-M (FU) | Use of treated seeds restricted to greenhouses | 01/07/2021*** |
| 23- Oxamyl (IN, NE), CfS | Non-renewal of approval voted in March 2023 SCoPAFF | 30/9/2023 |
| 24- Prochloraz (FU), CfS | Approval expired 31/12/2021 | 30/06/2023* |
| 25- Propiconazole (FU) | Non-renewal of approval voted in SCoPAFF. CIR published 28/11/2018 | 19/03/2020 |
| 26- Quinoxyfen (FU) | Non-renewal of approval voted in SCoPAFF. CIR published 7/12/2018 | 31/03/2020 |

* When an approval simply expires, the maximum grace period which can be granted by a MS cannot exceed 18 months.

** Approval expired 01/12/2020, applicant decided not to apply for renewal of approval.

*** regarding sowing treated seeds outdoors (AS is approved until 2035). **Note: applicant has requested that approval be revised to allow outdoor sowing (evaluation ongoing).** AS is one of the 3 AS in the seed treatment Vibrance SB.

# The emptying crop protection toolbox: lost A.S. Part 3.

| Active Substance (AS) | Reason for loss | Max grace period |
|---|---|---|
| 27- S-Metolachlor (HB) | Non-renewal of approval voted in SCoPAFF. CIR published 3/1/2024 | 23/07/2024 |
| 28- Spirotetramat (IN) | Applicant did not seek renewal of approval | 30/12/2025* |
| 29- Sulfoxaflor (IN) | Ban on outdoor use imposed (CIR 2022/686) | 19/05/2023 |
| 30- Thiacloprid (IN), CfS | Non-renewal of approval voted in SCoPAFF. CIR published 14/1/2020 | 03/02/2021 |
| 31- Thiamethoxam (IN)** | Ban on outdoor use imposed, no renewal sought**** | 19/12/2018 |
| 32- Thiophanate-methyl (FU) | Applicant withdrew application for renewal of approval***** | 19/10/2021 |
| 33- Thiram (FU) | Non-renewal adopted by COM (no opinion in AC). CIR published 10/10/2018 | 30/01/2020 |
| 34- Triflusulfuron (HB) | Non-renewal of approval voted in SCoPAFF. CIR published 17/11/2023 | 20/08/2024 |
| 35- Zeta-Cypermethrin (IN) | No renewal sought. Approval expired 01/12/2020 | 01/06/2022* |

* When an approval simply expires, the maximum grace period which can be granted by a MS cannot exceed 18 months.
** Approval expired 30/4/2019, applicant decided not to apply for renewal of approval.
**** Approval expired 31/01/2019, applicant decided not to apply for renewal of approval.
*****COM proposed non-renewal of approval, so applicant withdrew application to obtain a longer grace period.


# Changes in beet seed treatment in the EU

- Insecticide seed treatments (neonic-treated seed non longer an option)
  - Emergency Authorizations for “Buteo Start” (A.S. flupyradifurone, current approval expires 9/12/2025) granted in several countries (AT, CZ, HU, SK, RO, FI, ES).
  - Seed treatment with “Force” (tefluthrin, approval extended to 31/5/2027) is more or less standard
- Fungicides seed treatments (Fludioxonil, Metalaxyl-M & Sedaxane used in Vibrance SB non longer an option)
  - Seed treatment with Penthiopyrad (current approval expires 31/5/2025, PPP “Kabinast or Rampart”) in some countries
  - Seed treatment Hymexazol (current approval expires 31/8/2026, PPP “Tachigaren”) appears standard

# The global picture: EU's farmers toolbox in 2024

**76**
**NET LOSS OF CONVENTIONAL CHEMICAL A.S.**

No new chemical A.S. approved in the last 5 years

Loss of over 10 A.S./year (2000-2010)

76 chemical A.S. non-renewed, withdraw or expired

**8**
**NET LOSS OF BIOLOGICAL A.S.**

13 new biological A.S. approved since 2009

None for 22 months

21 biological A.S. non renewed, withdrawn or expired

**6**
**NEW BASIC SUBSTANCES**

6 new basic substances approved In the last 5 years

This includes cow milk...

Source: CropLife, October 2024

# An increasing unfair level-playing field


- **CIBE monitors the PPPs in non-EU countries exporting to the EU:** Numerous active substances authorized in sugar cane in some countries but no longer authorized at all in the EU for sugar beet cultivation

## Ex. Herbicides in Brazil

| Authorised for use on sugar cane in Brazil | Status in EU |
|---|---|
| Ametryn | Authorisation expired in 2002 |
| Aryloxyalkonoic acid | Alkyloxyl and aryl mercury compounds are banned in the EU |
| Atrazine | Authorization expired in 2004 |
| Diuron | Approval expired 30/09/2020 |
| Ethoxysulfuron | Approval expired 31/03/2014 |
| Glufosinate | Approval expired 31/07/2018 |
| Haloxifop-P-methyl | Approval expired 31/12/2020 |
| Hexazinone | Essential use only/used until 2004 |
| Imazapic | Not approved |
| Imazapir | Approval expired on 31 December 2007 |
| Metsulfuron-Methyl | Approved until 31/3/2024 |
| MSMA | Authorization expired in 2002 |
| Oxadiazon | Approval expired 31/12/2018 |
| Oxyfluorfen | Approved until 31/3/2024 |
| S-Metolachlor | Approved until 15/11/2024 - but non-renewal of approval has been decided |
| Tebuthiuron | Approval expired on 31 December 2007 |
| Trifluralin | Non inclusion voted May 2010. |

(Source: PPPs database Brazil , 2023)

## Ex. Insecticides in Brazil

| Authorised for use on sugar cane in Brazil | Status in EU |
|---|---|
| Alpha-cypermethrin | Approval expired 7/6/2021 |
| Carbosulfan | Approval expired on 13 December 2008 |
| Bifentrin | Approval expired 31/07/2019 |
| Chlorfluazuron | Approval expired on 31 December 2007 |
| Fipronil | Approval expired 30/09/2017 |
| Imidacloprid | Approval expired 01/12/2020, restrictions of sowing treated seed outdoors applied from late 2018 |
| Lufenuron | Approval expired 31/12/2019 |
| Methomyl | Approval expired 31/8/2019 |
| Novaluron | Applicant withdrew its application on 29 February 2012 |
| Teflubenzuron | Approval expired 30/11/2019 |
| Thiamethoxan | Approval expired30/4/2019, restrictions of sowing treated seed outdoors applied from late 2018 |
| Triflumurom | Approval expired 31/3/2021 |

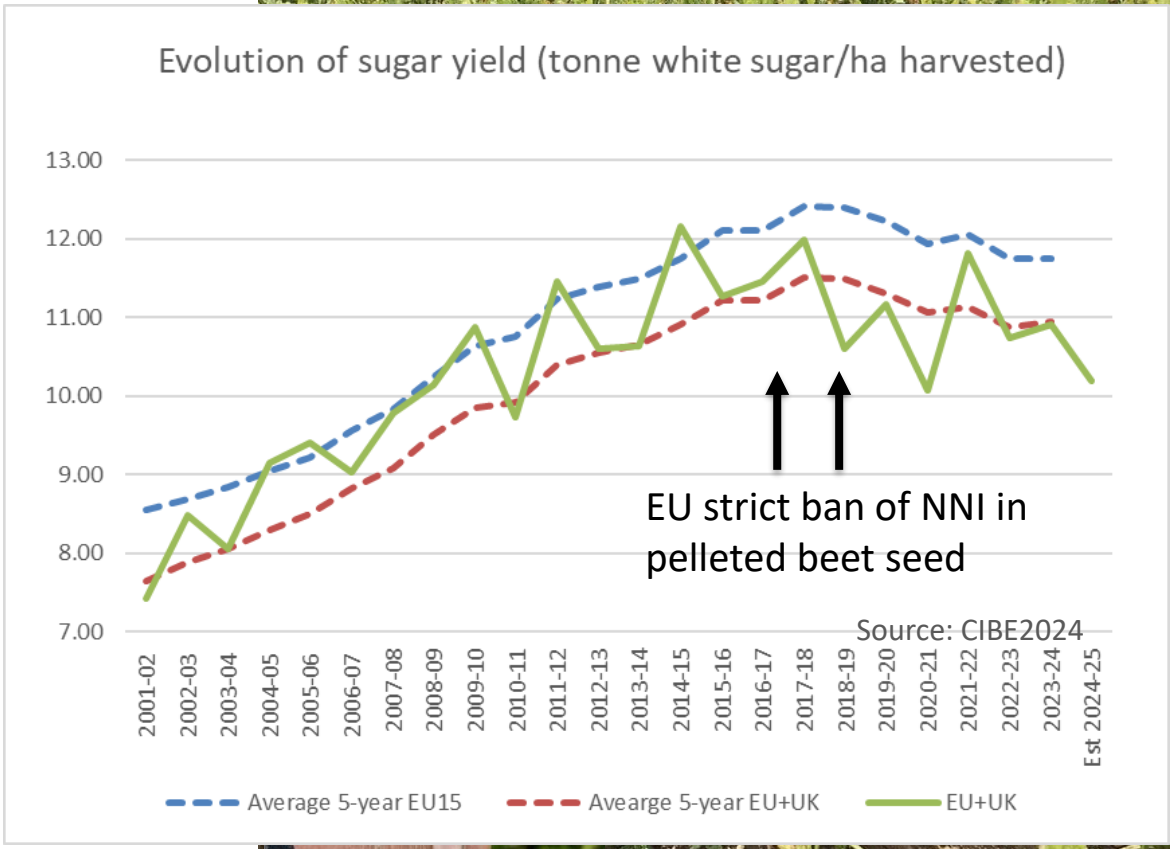
# Productivity losses in EU sugar beet


- Europe's 5-year average sugar **yield** per hectare is more volatile and has started to decrease after two decades of constant growth.

- One element which stands out in the last 2 campaigns is the low sugar content: in 2024/25, only Denmark and Sweden (the UK may join them eventually) expect an average final sugar content of over 17%

- A combination of negative factors: climatic conditions, difficulties to control pests and diseases, and possibly lower performance of multiple tolerant varieties (to be confirmed)

  - EU sugar beet **productivity** is stagnating/decreasing → **Competitiveness** and **attractiveness** of sugar beet, vis-à-vis alternative crops and vis-à-vis third competitors has decreased.





# Recent development of diseases difficult to control, affecting the beet crop, yield, storage and processing

- **SBR** (Syndrome de basse richesse - Low sugar content syndrome) and **RTD** (rubbery taproot syndrome) are expanding (especially in South Germany, Switzerland, Austria, Romania, Czech Republic, Slovakia), caused by different bacterial pathogens (phytoplasma, protobacteria) transmitted by different species of planthoppers (Cixiidae).
- **Macrophomina phaseolina root rot** –a "secondary" disease (phytoplasma transmitted by a planthopper) in sugar beet (Romania, South Germany, Slovakia, Serbia), i.e. the beet need to be stressed first, either by biotic factors such as RTD, or possibly abiotic factors such as prolonged heat
- **Virus yellows**, transmitted by aphids, also remains present in many regions, such as France: without the systemic protection of neonic seed treatment Virus Yellows (Beet Yellows Virus (BYV), Beet Mild Yellowing Virus (BMYV), Beet Chlorosis Virus (BChV) have spread over Europe since 2020, with potential yield loss up to 50-70%
- The presence of foliar diseases, especially mildew and **cercospora**, on beet is gaining ground (varietal resistance has been broken in some regions this MY)


# A further short-term challenge for EU sugar beet growers

- Over **40 A.S. will be coming under scrutiny within the next 2 years (up to 31/12/2026**) 11 of these are so-called Candidates for Substitution (CfS).

- Looking **beyond 2028**:

  **7 AS only had their approval extended until 2027** & are living on 'borrowed time'
  Of the **6 chemical HB AS** currently **approved beyond 2028,** one (**glyphosate – approved until 2033**) is a political 'hot potato',
  Of the **2 chemical IN AS** currently **approved beyond 2028**:
  - 1 (**cypermethrin**) is a CfS, likely to come 'under pressure'
  - 1 (**acetamiprid**) may be put into question, only available via Emergency Authorisation in most countries (excepting SE & UK) & banned in one country (FR)

  **Only 2 chemical FU A.S.** (Mefentrifluconazole & Trifloxystrobin) currently approved beyond 2028

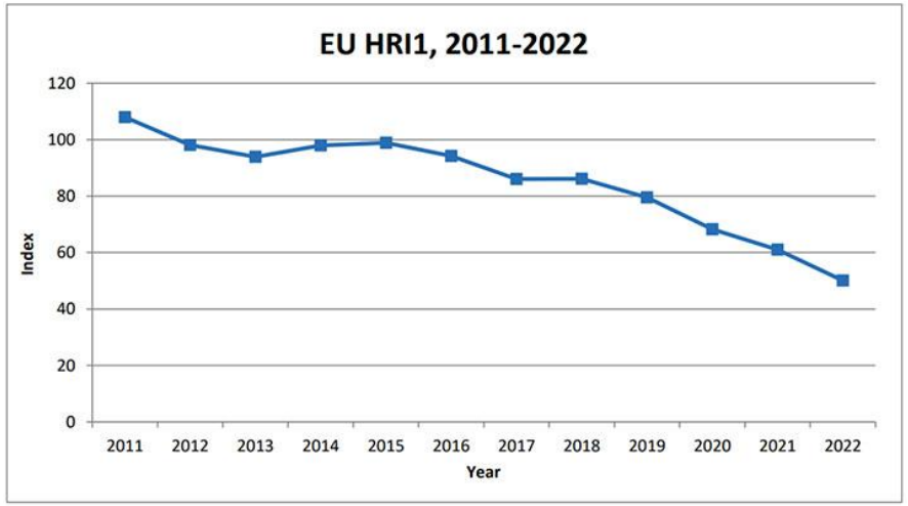
- On paper, we have **7 biological IN AS** (2 Bt Aizawai strains + 5 Bt Kurstaki strains) until 2038, but how effective are PPPs containing these A.S. in practice?

# 2. HOW TO DEPOLARIZE THE POLICY DEBATE AND RESPOND ? Rebalancing the EU Green deal – re-establish facts around environment, climate change and production


# Delivering the Green Deal #EUFarmtoFork

The Commission published updated EU Harmonised Risk Indicators for pesticides for the period 2011-2022 for the EU. These indicators show the trends in the risks associated with the use of pesticides since 2011.

- Harmonised Risk Indicator 1 (HRI 1), measuring **the use and risk of pesticides, shows a decrease of 50% since the baseline period of 2011-2013 and an 11% decline compared to 2021, relative to the baseline period of 2011-2013.**




Source: EU Commission, October 2024

➢ **EU farmers are delivering and are "greener"**

# Rebalancing the EU Green Deal

The EU Green Deal, its Farm to Fork Strategy and the proposal by the Commission for a **regulation on the Sustainable Use of Pesticides (SUR) presented in 2022** was only about legally binding targets in terms of reduction of PPPs, more restrictions & constraints, legally binding rigid/unfeasible rules to implement Integrated Pest Management (IPM) practices, extremely bureaucratic provisions

- Unrealistic, costly and inacceptable

Following strong lobbying and big EU farmers' protests in 2024:

- this proposal for a SUR has been withdrawn (& some "green" provisions in the CAP suspended)
- the Commission reckoned it has gone "too far-too fast"
- a "Strategic Dialogue" has been established by the Commission in spring 2024 to "depolarize" the debate and build trust
- it **no longer makes recommendations for legally binding targets for reduced use of chemical PPPs**, for legally binding strict IPM strict rules, etc.
- farming and food finally considered as strategic


***Pesticides Proposal SUR Rejected in EP Plenary***

***EU Commission chief withdraws contested pesticide regulation***

# Rebalancing the EU Green Deal (2)

- However, the crop protection toolbox at EU growers' disposal will soon be very short for a sustainable EU agriculture and for a sustainable EU sugar beet. There is a need:
  - **to avoid ban without workable, affordable & effective alternatives → principle now agreed by the EU Commissioner for Agriculture!**
  - to accelerate the approval of new innovative and effective alternatives
  - for more regular use of all risk mitigation and management measures and derogation options (negligible exposure, essential use, emergency use)
  - to decrease administrative burdens
- An adapted regulatory framework is needed for biocontrol:
  - to fix the regulation & speed up authorisation of biocontrol A.S.
- The future of the **New Genomics Techniques** framework needs to be implemented urgently to allow new breeding solutions (GM beet remains a "no-go" in the EU)


EUROPEAN COMMISSION

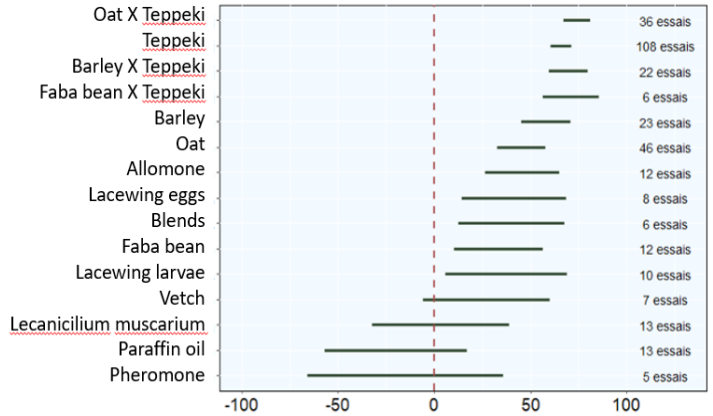
An EU Compass to regain competitiveness and secure sustainable prosperity

A Vision for Food and Agriculture

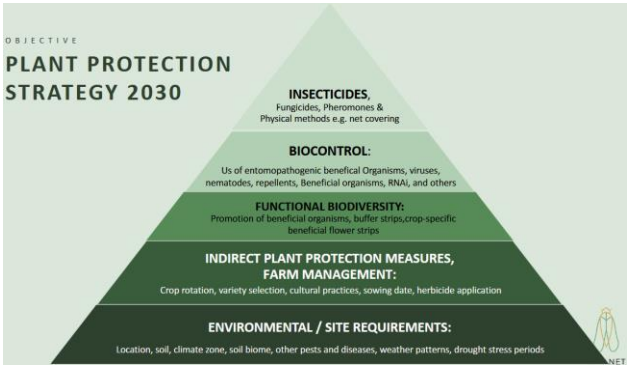
# A boost in R&D: some results coming

**Numerous Research programmes ongoing across the EU with national beet institutes (ITB, IfZ, IRS, BBRO, IRBAB…), universities, sugar companies, breeders, regional agriculture chambers etc. :**

- Forecasting, warning & monitoring models/tools for various pests & diseases
- Beet yellows virus(es): Numerous VY projects in France, Belgium, Germany, Switzerland, UK
- SBR and RTD: numerous projects, trials have started, notably in Germany & Switzerland
- Weed control, mechanical/robotics (9th edition of Desherb'avenir 2025 demo – May 2025), precision & spraying techniques (incl. with AI) in many countries
- IPM and pest control (e.g. weevils, flea beetles, soil pest such as springtails, centipedes & millipedes), combined agronomic strategies: crop rotation, technical cultivation measures




Percentage decrease of the aphid populations + 14 days

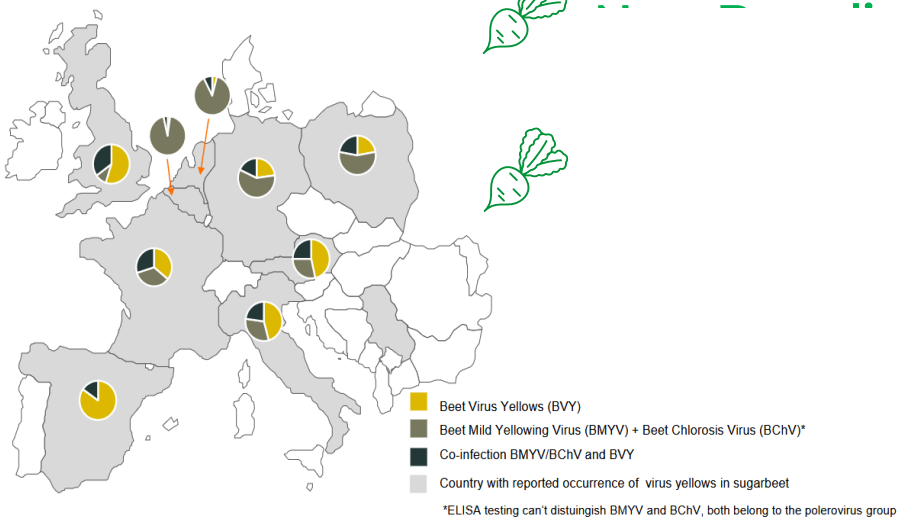



# Some hope in new AS ?

In the **“pipeline”** for EU sugar beet growers:

- HB:
  - Florpyrauxifen-benzyl, PPP name “Rinskor”;
- IN:
  - Dimpropyridaz, PPP name “AxaliON”;
  - Cyantraniliprole, numerous PPP names;
  - Peptide, U1-AGTX-Ta1b-QA, PPP name “Basin-Flex”;
- FU:
  - Fenpicoxamid - formerly known as Lyserphenvalpyr, PPP name “Inatreq”;

# Some hope in new breeding solutions

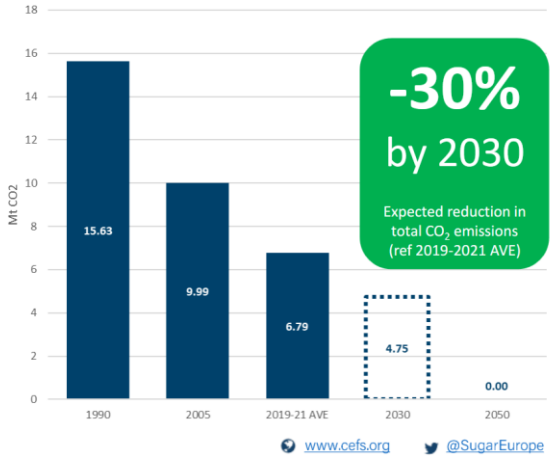




Source: KWS Virus Monitoring 2020; n=3035 samples, thereof 1936 positive

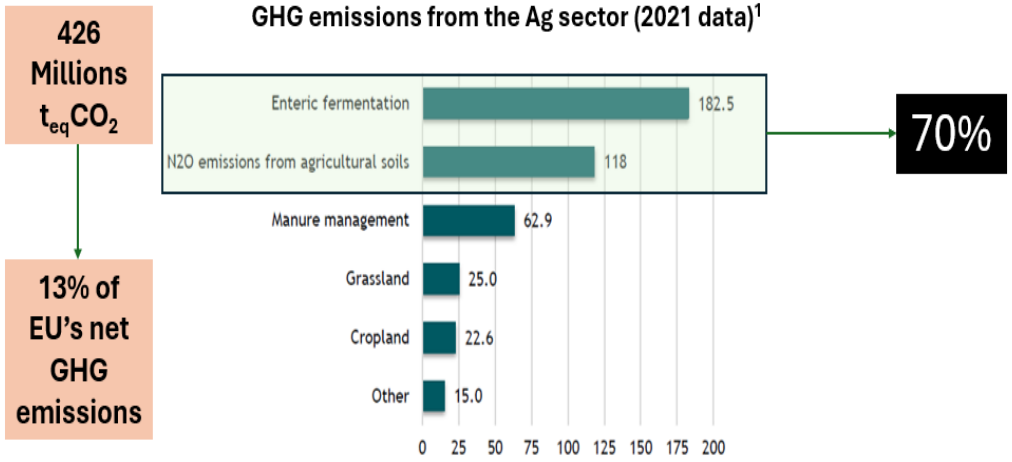
- Control of **Cercospora** is getting more and more difficult, Cercospora incidence has increased dramatically, becoming a significant concern for growers, therefore becoming one key breeding target (CR+ varieties)
- **Weed control** in certain conditions can be managed by targeted technologies, such as CONVISO® SMART varieties treated with CONVISO ONE
- First varieties (6) partially tolerant for **Virus Yellows** based on existing pool have emerged but their efficiency still needs to be assessed (new tolerant varieties in the pipe?)
- **g Technologies** can offer next level sugar beet hybrids
- ?, Rhizomania, Rhizoctonia, Nematodes, Aphanomyces, Beet
  - **But herbicide-tolerant varieties remain stigmatized in the EU**
  - **Not clear how multiple tolerances/resistances could affect yield potential (root yield & sugar content, quality)**
  - **New varieties are more costly!**

# Achieving climate neutrality in the EU sugar beet sector: towards low carbon farming

**Possible trajectory of $CO_2$ emissions in the EU beet sugar industry**




Source: CEFS,2024

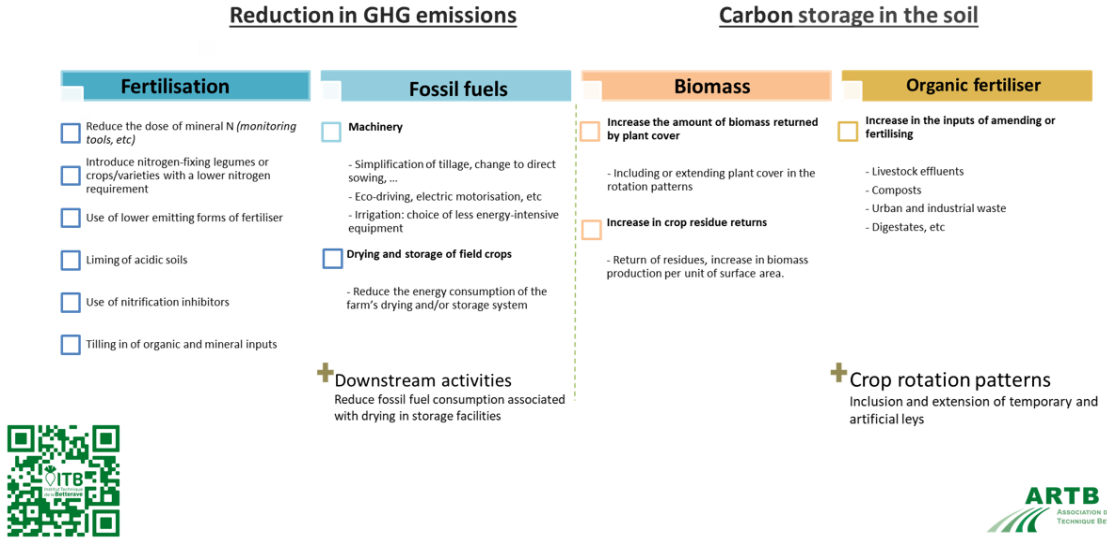



[1] : Emissions related to energy consumption from farms (machinery, farm buildings) are excluded since those emissions are aggregated in MS reporting within the "energy use" that regroups Agriculture, Forestry and Fishing sectors. Those emissions represented 77 $MtCO_2eq$. in 2021.
Source: ARTB, 2024

- **Objective of climate neutrality by 2050 remains a very ambitious trajectory**
- The land use and land use change and forestry (LULUCF) sector is required to **increase the net carbon sink, with a target to achieve a net GHG removals of 310 $MtCO_2eq$ by 2030** (+40% storing compared to 2005)
- **To achieve their decarbonation roadmap, sugar manufacturers are requesting growers to reduce their GHG emissions (see the Science Based Targets initiative -SBTi)**

# Carbon farming: from necessity to opportunity

- **What practices for carbon gains – what synergies climate/biodiversity?**




- How to measure/remunerate carbon farming ? **New EU Certification framework for permanent carbon removals (CFCR Regulation) for reliable MRV**

- European regulations are more ambitious than just « carbon »:
  - Possible development of “nature credits”?
  - Increased need to report and quantify (environmental) « **SUSTAINABILITY** » efforts done by farmers
  - Need for reliable and traceable **AG DATA** is becoming a **PRIORITY** for all actors along **VALUE CHAINS**

# EU growers' challenges

The EU sugar beet sector is facing multiple structural changes:

1. **Structural changes in cultivation/production** with a race against time and an urgent need to rebalance ecology with productivity & competitiveness

2. **Structural changes related to the adoption of low-carbon practices**

3. **Structural changes in costs of production/income**: costs of production/inputs have increased significantly since 2020 (incl. PPPs and seeds) and will remain high, deterioration of the terms-of-trade for agriculture → high risk of price-costs squeeze

4. **Structural changes in market and trade landscape**: trade distortive measures by third competitors, constant opening up of the EU sugar market to third countries (incl. Ukraine), EU sugar food consumption decline/stagnation (changing dietary habits, government taxation), production (yield) volatility increase (of over 1 million tonnes annually)

# EU growers' demands

These structural changes need **appropriate responses to regain in productivity, competitiveness and resilience**:

1. Materialize the change in policy direction (Common Agricultural Policy, Farm to Fork), support the development of risk management tools, redefine the conditions of access/production of inputs (energy, fertilizers)
2. Adapt the regulatory framework for chemical PPPs ('no ban without effective & affordable alternatives'), for effective biocontrol solutions and for NGTs and trust science (scientific consensus!)
3. Support innovation/R&D and investments in new tools/technologies so as to de-risk the new conditions of production
4. Develop carbon/biodiversity remuneration and adapt, if necessary, mandatory targets
5. Unlock the potential of sugar beet for non-food uses (bioenergy, bio-based products)
6. Define a coherent EU trade policy – stop further EU sugar market access concession & implement reciprocity measures for imported sugar (fair competition)

# Thank you for your attention

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