EU-NIGERIA
Agribusiness Platform
eungagribusiness.com

MARKET INTELLIGENCE BRIEF

SUGAR

HS 1701 | EUNAC 2026

Global Gateway

Funded by the European Union

The Platform is managed by Agribusiness Register (ABR) Limited

AGRIBUSINESS REGISTER LIMITED

EU Import Market (2024)	Nigeria's Export Target
USD 18.71 Billion	**USD 187.1 Million (1%)**
Specially Sugar Price (Demerara)	Potential Cane Land Available
EUR 800 - 1,200 / MT	**800,000+ Hectares**

MARKET OVERVIEW

The EU operates the world's most structurally complex sugar market, built on two irreconcilable agricultural realities: it is the world's leading producer of beet sugar, yet it cannot produce a single kilogram of cane sugar domestically. This duality — beet sugar dominant in domestic production, cane sugar wholly imported — is the foundational market intelligence insight for Nigeria's EU sugar entry strategy. Understanding which segment of this market Nigeria can enter, and on what competitive basis, determines the entire strategic approach. The EU imported USD 18.71 billion of sugar (HS 1701) from world markets in 2024.

The EU produces around 16.5 million metric tonnes of sugar annually from beet. However, beet sugar accounts for only 20% of world sugar production — the other 80% of global sugar comes from sugar cane grown in tropical and subtropical regions.

MARKET SNAPSHOT

EU Import Value (2024)	USD 18.71 billion — largest single agricultural import line
EU MFN Tariff on Nigeria	EUR 323/tonne raw sugar; EUR 419/tonne refined — prohibitive without EPA
EPA Status	Nigeria is the ONLY ECOWAS country not yet signed — every neighbour has duty-free access
Specialty Cane Premium	Demerara/muscovado: EUR 800–1,200/MT (2–3x commodity price); organic +30–60%
Fairtrade Sugar Growth	8–12% per year in German, Dutch, and Scandinavian retail
Nigeria Domestic Demand	1.7–1.9 million MT/year growing at 2.4% p.a. — strong captive market

NIGERIA'S SUGAR INDUSTRY PLAYERS

- **Dangote Sugar Refinery** (Numan, Adamawa State) — Nigeria's largest integrated cane estate and refinery; USD 2.5B investment.
- **BUA Sugar** (Lafiagi, Kwara State) — Located within the premium Niger River cane belt; ideal for specialty cane production.
- **Golden Sugar / Flour Mills of Nigeria** (Sunti, Niger State) — Prime site for demerara and muscovado processing.
- **NSDC Executive Secretary** elected Chair of ISO Sugar Administrative Committee — unprecedented multilateral institutional credibility.

FOUR-TRACK MARKET ENTRY STRATEGY

Track 1 — Policy	EPA Signing (2026): eliminates EUR 323–419/tonne tariff — costs nothing, unlocks everything
Track 2 — Specialty Sugar	Demerara, muscovado, organic cane: enter EU TODAY via GSP/Fairtrade — no EPA required
Track 3 — Investment	800,000+ ha cane land + Sugar Master Plan = compelling DFI partnership case at EUNAC 2026
Track 4 — Logistics	Apapa–Gioia Tauro 14 days; distributes to UK, Spain, France, Germany

INVESTMENT OPPORTUNITIES

- **Specialty Cane Processing Facility:** EUR 15–25M for 50,000 MT/year demerara/muscovado plant co-located with BUA or Golden Sugar.
- **Nigeria Organic Cane Certification:** EU technical assistance for organic certification of 50,000 hectares. Co-implement with NSDC.
- **Cane Sugar–Ethanol Integration:** EUR 20–35M bagasse-to-energy + molasses-to-ethanol facility qualifying under EU RED II advanced biofuel mandates.

KEY EU BUYERS

Tate & Lyle Sugars (ASR Group)	Europe's leading cane sugar refiner — largest ACP/EPA cane buyer historically
Ragus Pure Cane Sugars (UK)	Specialist demerara/muscovado manufacturer — natural first-mover partner for Nigeria
Tereos (France)	2nd largest global sugar producer — active ACP/EPA buyer with African precedent
Südzucker / AGRANA (Germany)	Europe's largest sugar company — expanding specialty/organic portfolio

What Is EUNAC

ENGAGE WITH NIGERIA AT EUNAC 2026
LAGOS, 25 JUNE 2026

B2B Matchmaking | Investment Wall | Commodity Showcase | Policy Dialogue | Deal Signing

EU–Nigeria Agribusiness Connect 2026 (EUNAC 2026) is a EU–Nigeria agribusiness trade and investment platform designed to connect Nigerian and European businesses, investors, exporters, and technology providers through B2B matchmaking, partnerships, and market access opportunities. The event promotes two-way trade by supporting Nigerian exports to the EU while creating opportunities for European agribusiness products, technology, and services in Nigeria. EUNAC will be an annual event from the first edition in 2026

For Enquiries:
Nathaniel Odiba - 08057857864
Rita Ufford - 09112365931
info@eungagribusiness.com

SOURCES

1.	Eurostat: Comext External Trade Database — HS-level import data by origin, 2022–2024. Luxembourg. https://ec.europa.eu/eurostat/web/international-trade-in-goods
2.	UN Comtrade Database: Bilateral trade flows Nigeria–EU27, 2019–2024. United Nations Statistics Division. https://comtradeplus.un.org
3.	International Trade Centre (ITC) — Trade Map: Market Analysis & Export Intelligence. Geneva, 2024–2026. https://www.trademap.org
4.	Nigerian Export Promotion Council (NEPC): Nigeria Non-Oil Export Performance Report 2023–2024. Abuja. https://www.nepc.gov.ng
5.	EU Deforestation Regulation (EUDR) — Regulation (EU) 2023/1115. Official Journal of the European Union, June 2023.
6.	Food and Agriculture Organization of the United Nations (FAO): FAOSTAT — Production & Trade Data, Nigeria, 2020–2024. Rome. https://www.fao.org/faostat
7.	Nigeria Sugar Master Plan (NSMP): National Sugar Development Council — Production & Investment Framework 2024–2030. Abuja, August 2025.
8.	International Sugar Organization (ISO): Sugar Year Book & Market Reports 2024–2025. London. https://www.isosugar.org

DISCLAIMER

This Market Intelligence Brief has been prepared by Agribusiness Register Limited (ABR) on behalf of the EU-Nigeria Agribusiness Platform (EUNAP) for the purposes of the EUNAC 2026 conference (Lagos, 25 June 2026). It is intended solely for informational and business facilitation purposes and is directed at professional investors, trade buyers, wholesalers, retailers, and policy stakeholders engaged in EU-Nigeria agribusiness and commodity trade.

The information has been compiled from publicly available sources, official trade databases, industry reports, and proprietary research conducted by ABR/EUNAP. While every reasonable effort has been made to ensure accuracy, ABR, EUNAP, and their officers, employees, and agents make no representation or warranty as to the accuracy, reliability, or completeness of the information contained in this document.

This document does not constitute financial, investment, or legal advice, nor any solicitation or offer to buy or sell any securities, commodities, or financial instruments. Market data, pricing, trade statistics, and regulatory information are subject to change without notice. Recipients should conduct independent due diligence and seek appropriate professional advice before making any investment, procurement, or business decisions.

Trade statistics are sourced from Eurostat Comext, UN Comtrade, ITC Trade Map, and FAO FAOSTAT and are presented in good faith. All USD/EUR figures are based on prevailing exchange rates and commodity price benchmarks at the time of compilation (Q1-Q2 2026) and are subject to market fluctuation.

References to named companies and trading houses are for intelligence and facilitation purposes only and do not imply any existing commercial relationship or endorsement unless explicitly stated. Investment targets and export projections are aspirational modelled scenarios, not guarantees.

This document is confidential and reproduction or distribution without prior written consent of ABR is prohibited.

EU-NIGERIA
Agribusiness Platform
eungagribusiness.com

MARKET INTELLIGENCE BRIEF

SUGAR

HS 1701 | EUNAC 2026