

France's sugar beet harvest set to hit 46-year low as drought cuts output by 30%

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Agreste forecasts France's 2026 sugar beet production at 25.3 million tonnes as extreme heat, water shortages and crop diseases hit yields, raising concerns over sugar availability during the 2026/27 crushing season



France's sugar beet sector is facing its weakest harvest in decades, with persistent heat, drought and pest-related damage expected to drive production to its lowest level since 1980. French Ministry of Agriculture's statistical service, sugar beet production is projected to reach 25.3 million tonnes in 2026, down 10.6 million tonnes from approximately 35.9 million tonnes in 2025. The decline of around 30 per cent underscores the severity of the weather-related pressures confronting one of Europe's leading sugar-producing countries.

The latest estimate also points to a further deterioration in crop yields. Average sugar beet productivity is forecast at 67.8 tonnes per hectare, a 24.9 per cent year-on-year decline and below the 68.2 tonnes per hectare projected in September. France's planted area is estimated at approximately 374,167 hectares, around 6 per cent lower than a year earlier.

Heat and drought compound crop losses

Extreme summer temperatures and severe water shortages across France's major sugar beet-growing regions have restricted root development, weakening the crop during a critical growth period. The adverse conditions have also intensified pest and disease pressures, compounding the impact on yields and harvest quality.

Drought has aggravated infestations involving weevils and sugar beet moths, while conditions have favoured the spread of Rhizopus rot, a disease that can damage beet roots and compromise their suitability for processing.

The consequences may extend beyond lower field yields. French industry estimates suggest that approximately 20,000 hectares of sugar beet could ultimately remain unharvested, as severe disease has reportedly left some fields unsuitable for conventional harvesting and processing. The final extent of these losses is expected to become clearer after the crushing season concludes.

Regional disparities expose the scale of the damage

The impact has been particularly severe in parts of northern and central France. Average yields in Burgundy-Franche-Comté are forecast to fall 59.7 per cent year on year, while Île-de-France is expected to record a 55 per cent decline. Normandy appears comparatively resilient, with yields projected at approximately 87.4 tonnes per hectare. Although this remains below last year's level, it is substantially higher than the national average, highlighting the uneven geographical distribution of weather-related damage.

These regional differences will matter for sugar processors as they assess beet availability, factory utilisation and the economics of the 2026/27 campaign. Lower yields and potentially unharvested acreage could constrain the volume of raw material reaching processing plants.

European sugar supply faces another pressure point

France is a major European sugar beet producer, and a harvest contraction of this magnitude is likely to put pressure on its domestic sugar industry during the 2026/27 crushing season. Reduced beet availability could also add to supply concerns across the wider European sugar market, although the ultimate impact will depend on production outcomes in other countries, inventories, trade flows and demand.

The distinction between beet production and sugar output is critical. The forecast of 25.3 million tonnes refers to harvested sugar beet, not finished sugar. Actual sugar production will depend on the final volume of beet processed, its sucrose content and factory recovery rates.