International Sugar Organization

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- ## ISO SUGAR YEARBOOK 2016

Comprehensive coverage of production, consumption, trade and stocks in the whole world for the past seven years **(2008-2015)**. About 400 pages, nearly 150 country tables. Individual countries tables show production, consumption and trade by countries of origin and destination for the last eight years. 18 general tables including raw and white sugar trade and per capita consumption. The most complete, authoritative and up to date source of world sugar statistics available. Hard bound in handy pocket size. ***Also available in electronic version (PDF, Excel & Word format).***

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- ## ISO ETHANOL YEARBOOK 2016

Provides comprehensive statistics of the world ethanol (fuel and non-fuel) market, including nearly 100 tables comprising production, consumption, trade, prices and government policy. The Yearbook also includes a detailed 10-page analysis of the world ethanol market in 2015, with key developments in production, consumption, prices, costs, international trade and blending mandates. ***Available in Hardcopy (pocket size) and electronic version (PDF & Excel)***

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- ## MONTHLY STATISTICAL BULLETIN

Providing invaluable updates on the world sugar situation between Yearbooks. Around 85 pages with approximately 160 tables providing comprehensive monthly figures for both raw & white sugar trade as well as production & consumption. Released around the fifth day of each month. ***Available in electronic version (PDF & Excel format).***

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- ## MONTHLY MARKET REPORT

Brief report covering all the important developments during the previous month including comments on world sugar and ethanol markets as well as on fundamentals in pivotal national markets together with information on new sugar production projects, cogeneration in the sugar industry, alternative sweeteners, WTO and regional trade agreements. Approximately 10 pages (A4) released around 8th day of each month. ***Available in electronic version (PDF format).***

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- ## QUARTERLY MARKET OUTLOOK

Mid-term analysis on sugar & sweeteners market developments. Complete world balance estimates covering sugar production, consumption, trade & stocks. Sections on WTO, alternative sweeteners, molasses & alcohol, currency updates, Regional Trade Agreements. Briefs on the most topical subjects including twice a year updates on changes in national sugar policies. Approx. 60 pages (A4). Released around the tenth day of the month of every quarter (February, May, August & November). ***Available in electronic version (PDF format).***

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- ## WORLD SUGAR BALANCES

Produced four times a year in conjunction with the ISO Quarterly Market Outlook. Current forecasts and historical data (7 year series) on production, consumption, imports, exports and stocks on the country-by-country basis, as well as regional and world totals for October/September crop years presented on 21 pages in Word's format. ***Available in electronic version (PDF & Word format)***

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Corporate copies of the Sugar Yearbook and Ethanol Yearbook are available to order on request with a one page overview of your company and logo at a discounted price (minimum order of 50 books)

- **ISO STUDIES**

ISO studies are prepared with the aim of providing concise review and analysis of often fast-moving issues and developments arising within the current economic and political environment of the world sugar market. ***Also available in electronic version (PDF format)***

MECAS(16)07 – Prospects for Thailand's Sugar Industry

Thailand's sugar industry is one of the largest worldwide, in 2015 producing around 11 mln tonnes and exporting almost 8 mln tonnes. The objective in this study is to assess the sugar industry's outlook over the coming decade by examining key drivers including: government policy and targets for the sector, the potential for cane area expansion; prospects for cane yields/quality; milling sector developments; as well as sugar consumption prospects. A key focal point is the relative success the Thai sugar industry has attained in adding value by diversifying into cane bagasse cogeneration and into fuel ethanol production.

MECAS(16)06 – World Trade of Molasses, Beet Pulp and By-products

The study is dedicated to reviewing recent fundamental developments and identifying the key drivers of the world trade in molasses and beet pulp, by-products of the sugar industry. Although molasses and beet pulp are used mostly domestically, about 7% of world output of molasses and 15% of global production of beet pulp are exported to the world market. Molasses and beet pulp have only little value as compared to sugar, but sales of molasses and beet pulp abroad help generate additional income for the sugar industry with relatively low overheads.

MECAS(16)05 – Sugar and Health

Drawing from a range of sources, this study provides an overview of the main elements underpinning the "sugar and health" debate with the objective of separating fact from fiction. While there is abundant evidence to support the consumption of sugar as part of a healthy diet, there is insufficient evidence to suggest a link between total sugar intake and the prevalence of obesity. Nevertheless, demands for further regulation and taxation against sugary products are growing. This paper begins with an analysis of diets' composition and sugar consumption worldwide. It then examines key scientific facts and recent recommendations related to "sugar and health". The drivers and reactions to the current "sugar backlash" are analyzed from the point of view of consumers and food and beverage companies. Lastly, this study delves into the issue of taxation as a means to influence food prices and diets.

MECAS(15)19 – India: Future Sugar Industry Prospects

India is currently the world's largest consumer and the second largest producer of sugar. In the past, the national sugar balance regularly moved from surplus to deficit and back. However, since 2010/11 the country's sugar balance has shown an excess of production over domestic demand, season after season. A key issue addressed by the paper is the likelihood of the return of the sugar cycle. The ISO suggests that huge year-on-year drops in production below the level of domestic consumption are unlikely, at least in the coming three to five years assuming normal weather conditions. Even in the longer turn, the country's sugar balance may still hover around a 1 mln tonne surplus. The surplus character of the balance may be, however, altered by difficult-to-predict changes in the government sugar policy or a significant increase in cane use for ethanol production.

MECAS(15)18 – Organic, Fairtrade and Specialty Sugars

Organic, Fairtrade and specialty sugars for much of the past decade have seen fast growing niche markets, albeit together they are thought to presently account for less than 0.5% of world sugar consumption and production. With these niche sugars reputedly attracting sometimes significant pricing premiums over conventional sugar, and with ongoing strong fundamentals expected to support continued growth in demand for organic products in key markets, can offtake of niche sugars keep growing at strong rates? This study investigates the markets for organic, Fairtrade and specialty sugars with a view to better understanding recent market developments at the global, regional and country levels. Key markets and suppliers are identified and examined. Data are also collated on production, exports and price premiums.

MECAS(15)17 – Adding Value Through Bio-Products

Advances in technology have created numerous pathways to produce bio-chemicals and advanced biofuels through sugars present in agricultural crops and waste. A growing number of companies are considering the market potential for renewable molecules with a view to capturing higher margins. For the sugar sector, specifically, there are opportunities to create value-added solutions by exploiting existing and new resources while tapping into growing demand for bio-based materials. This report updates and expands MECAS(09)17 by investigating the potential for commercialization of cane and beet bio-products technology in the context of competing feedstocks and recent developments in crude oil prices.

MECAS(15)09 – National Sugar Standards: a Benchmark Survey
This study presents the ISO's first benchmark survey on the various standards that govern production and consumption of sugar in more than 70 countries. The paper comprises a comparative examination of over 100 sugar standards split into four key parameters: polarization, color, moisture and ash content. The analysis is supplemented by an appendix containing important information of the standards surveyed. Also avaiable in this study is a quantitative assessment of the world sugar trade by its main segments (raws and whites) and a qualitative discussion of the impact of sugar quality on pricing.

MECAS(15)08 – Non-Tariff Policy (NTMs/NTBs) in a Global Sugar Trade Context
In this study the ISO looks beyond tariffs to consider in more detail the potential impact of Tariff Rate Quota administration and to examine the wide range of government policies and interventions that are typically categorised as non-tariff measures (NTMs) and non-tariff barriers (NTBs) to trade. The study explores the potential impact on global sugar trade of a subset of five key categories of NTMs/NTBs. These include: tariff rate quotas administration; imports quotas, licencing and import bans; export incentives; exceptional measures; sugar quality standards; and price support schemes.

MECAS(15)06 – Domestic Sugar Prices – a Survey
The present survey provides an update on a long-term series of annual averages for domestic prices on both the retail and wholesale levels for the period from 2005 to 2014. Apart from being a reference paper, the paper also investigates links between world and domestic prices in a large number of countries including both exporters and importers of sugar, beet and cane sugar producers, focusing on the level of correlation between prices of the world and internal markets. The survey also shows a very low or even negative level of correlation between prices for sugar and sugar containing products.

MECAS(14)18 – Government Fuel Ethanol Policy
This study provides an update to the 2007 ISO paper (*MECAS(07)17*) on government fuel ethanol policy worldwide and builds on a 2012 ISO paper (*MECAS(12)19*) on global fuel ethanol outlook scenarios. It also draws on information provided on the ISO Ethanol Yearbook 2014. The main objective of this paper is to explore key policy implementation issues in the world top ten fuel ethanol consumers (which together account for 99% of the world market) and to provide indicative demand figures to 2025 for the three biggest markets globally, namely US, Brazil and the EU.

MECAS(14)17 – Outlook for Cogeneration in Cane Sugar Industries
This study updates and takes stock of recent developments in bagasse-based electricity co-generation in the global sugar cane industry. The situation in more han 30 cane producing countries is analyzed. The survey shows that bagasse-based production of electricity for export to the national grid is fast becoming a major activity of sugar cane mills. Thus, since 2009 the number of sugar mills exporting energy to the grid has more than doubled, reaching 490, while the overall installed capacity has nearly doubled, reaching 12,644 MW. Furthermore, the available information on expansion potential allows us to project a more than 100% increase in the global generating capacity of the sugar cane industry by the end of the current decade.

MECAS(14)16 – Australia's Sugar Industry Outlook
Australia is one of the globe's largest sugar producers and most important exporters in its role as a key supplier to East Asia. The country is recognised as one of the more efficient sugar producers even though its competitive position has been eroded over recent years. This paper will examine key drivers impacting Australia's sugar industry outlook over the longer term including: the potential for cane area expansion; prospects for cane yields/quality; milling sector developments; sugar marketing arrangements, rising costs, and sugar consumption prospects. Australia's sugar production prospects beyond 2020 are considered in the context of several freenfield investment possibilities in new frontier regions in Northern Australia. Finally, the paper examines if the Australian sugar industry can move from a traditional sugar-only industry to a value–adding industry by diversifying further into cane bagasse cogeneration and fuel ethanol production.

MECAS(14)07 – Government Sugar Trade Policy – Tariffs and Tariff Rate Quotas in a World Market Context
This study provides the ISO's first comprehensive analysis of applied tariffs and tariff-rate quotas (TRQs) in sugar across the 30 largest sugar importers (accounting for 75% of world trade) and the

20 largest sugar exporters (accounting for 90% of world trade). Access to major markets for raw and white sugar is shaped significantly by the disparity in applied tariff levels (between 0% and 200%) and by TRQs - including those providing minimum access under WTO commitments, those agreed under Free Trade Agreements and those agreed under other preferential trading arrangements.

MECAS(14)06 – China: Future Sugar Prospects

In 2013, China purchased a record 4.3 mln tonnes of mainly raw sugar from the world market consolidating its position as the world's largest sugar net-importer. What was originally seen as the inevitable result of a sharp drop in domestic production has continued even after output recovered, with heavy stocks now building up in the country. This study sees the ISO revisits China's role in the world sugar market and reviews the recent developments and drivers of China's sweetener market and provides indicative projections of production, consumption, and imports of sugar up to the year 2023.

MECAS(14)05 – The EU Sugar Market Post 2017

This study takes stock of major developments in the EU sugar industry over the past few years with the view of investigating the possible implications of the 2017 Reform of its Sugar Regime and its impact on the world market. Part 1 of the paper presents the characteristics of the EU sugar industry, its role in the world market since the 2006 Reform of the Sugar Regime, as well as the major developments in domestic beet sugar production, consumption, raw sugar refining, imports and exports over recent years. Part 2 of the paper assesses the key pillars of the upcoming 2017 Reform of the Sugar Regime, with a focus on the threat that the abolition of isoglucose (HFS) quota can bring to the EU sugar market. Part 3 presents the ISO forecasts for EU sugar production, consumption, imports and exports Post 2017.

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