International Sugar Organization

2017
PUBLICATIONS LIST

November 2016

Tel: +44 (0)20 7513 1144   Fax: +44 (0)20 7513 1146
Email: publications@isosugar.org
Web: www.isosugar.org

How to Order

NEW! ONLINE
Visit **www.isosugar.org** to purchase ISO publications. Kindly note all card payments online are processed in Sterling

TELEPHONE
Publications Division
+44 (0) 20 7715 9436 and have your Visa/Master Card/Access details ready.

FACSIMILE
Fax order forms to
+44 (0) 20 7513 1146

MAIL
For Bank drafts and UK cheques, forward the order form with payment to:
International Sugar Organization
One Canada Square
Canary Wharf
London E14 5AA

ENQUIRIES
For enquiries, please contact
Tel: +44 (0) 20 7513 1144
Direct line: +44 (0) 20 7715 9436
Fax +44 (0) 20 7513 1146
Email: publications@isosugar.org
Web: www.isosugar.org

- ## 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).***

Per Copy................£285.00

Back issues of the ISO Sugar Yearbook are also available @ £200.00 per copy

- ## 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)***

Per Copy................£230.00

Back issues of the ISO Ethanol Yearbook are also available @ £150.00 per copy.

- ## 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).***

Per Annum..........£290.00

Subscriptions run from January to December **Single issue............. £150.00**

- ## 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).***

Per Annum.......£260.00

Subscriptions run from March to February **Single issue...........£100.00**

- ## 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).***

Per Annum...........£405.00

Subscriptions run from January to December (1st issue in February) **Single issue...............£250.00**

- ## 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)***

Per Annum...........£290.00

Subscription runs from January to December (1st issue in February) **Single issue...............£150.00**

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)18 - Industrial and Direct Sugar Consumption – an International Survey

In 2010, the ISO provided a pioneering work on gathering statistics on direct and Industrial consumption of sugar in different countries. The new survey updates key data pertaining to the structure of sugar use with the goal of enhancing the understanding of the key drivers of sugar consumption by the food and beverages sector. In the survey, sugar consumption data are collected from 38 countries and the European Union. The surveyed countries were responsible for 75% of global sugar consumption in 2015. According to the survey, in global terms, overall consumption shows an average annual growth by 1.92%, which can be compared to only 0.40% for direct consumption while an average growth rate of industrial use is as high as 2.7% and that of sugar use by soft drink manufacturers is even higher (nearly 4.0% a year).

MECAS(16)17 – Foreign Direct Investment and Mergers and Acquisitions in the World Sugar Industry

This paper provides a comprehensive stocktaking of the major mergers and acquisitions and foreign direct investment flows (M&A/FDI) - including joint ventures - in the world sugar industry over the past 5 years. Pressures created by falling world sugar prices and depressed margins from 2011 until earlier this year have stymied M&A/FDI activity. Even so, there is evidence that some large producing companies have continued to integrate operations across their entire supply chain to rationalise costs and boost margins, as well as to enhance geographical coverage and to diversify operations through M&A/FDI activity. The period also features several major divestments. Several deals have transpired to transform the competitive sugar trading and distribution business.

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. 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. 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. The surplus character of the balance may be altered but 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.

ISO PROCEEDINGS

- **PROCEEDINGS OF THE 2016 ISO SEMINAR**
  "Bringing Sugar Together for 25 Years"

  Online.........£430.00

  - **Proceedings of previous ISO Seminars**
    - ***Please specify year or title of proceedings***

    Per copy............£230.00

- **PROCEEDINGS OF THE 2016 ISO WORKSHOP**
  "Sugar: Facts vs Myths"

  Online.......£320.00

  - **Proceedings of previous ISO Workshops**
    - ***Please specify year or title of proceedings***

    Per copy.............£150.00

PROCEEDINGS OF PREVIOUS ISO SEMINARS AND WORKSHOPS

SEMINARS:	2015	"Moving Towards a Sweeter Future?"
	2014	"Sugar and Ethanol: Fresh Options"
	2013	"Commercial Success for Sugar Crops – Investment, Innovation and Efficiency"
	2011	"Competitive Edge in Sugar – the Road to 2020"
	2010	"Crunch time goodbye - Sugar and Bioenergy flying high?"
WORKSHOPS:	2015	"*What issues will the Sugar Sector need to Focus on to Keep Ahead of the Game?"*
	2014	"Positioning for the New Market Frontiers"
	2013	"Developing Countries – Options for Growth in Sugarcane"
	2012	"India – Key Player in the World Sugar Economy"
	2011	"Sugar Industry Potential in Africa"
	2010	"The African Sugar Economy: Stock Taking and Potential for Development"

See full list: http://www.isosugar.org

Publications Order Form

All prices include postage & handling.

Title					Price	Quantity
	E	**F**	**S**	**R**		
ISO Sugar Yearbook 2016 Hardcopy/electronic* Per annum		N/A	N/A	N/A	£285	
ISO Ethanol Yearbook 2016 Hardcopy/electronic* Per annum		N/A	N/A	N/A	£230	
Monthly Statistical Bulletin Hardcopy/electronic* Per annum		N/A	N/A	N/A	£290	
Per issue*					£150	
Monthly Market Report Hardcopy/electronic * Per annum					£260	
Per issue*					£100	
Quarterly Market Outlook Hardcopy/electronic* Per annum					£405	
Per issue*					£250	
World Sugar Balances Hardcopy/electronic* Per annum		N/A	N/A	N/A	£290	
Per issue*		N/A	N/A	N/A	£150	
Proceedings of ISO Seminar Online*		N/A	N/A	N/A	£430	
Proceedings of previous ISO Seminars Online* (Please specify year or title)		N/A	N/A	N/A	£230	
Proceedings of ISO Workshop Online*		N/A	N/A	N/A	£320	
Proceedings of previous ISO Workshops Online* (Please specify year or title)		N/A	N/A	N/A	£150	
NEW ISO STUDIES					**£355**	
MECAS(16)07 HARDCOPY/PDF*					£305	
MECAS(16)06 HARDCOPY/PDF*					£305	
MECAS(16)05 HARDCOPY/PDF*					£305	
MECAS(15)19 HARDCOPY/PDF*					£305	
MECAS(15)18 HARDCOPY/PDF*					£305	
MECAS(15)17 HARDCOPY/PDF*					£305	
MECAS(15)09 HARDCOPY/PDF*					£305	
MECAS(15)08 HARDCOPY/PDF*					£305	
MECAS(15)06 HARDCOPY/PDF*					£305	
MECAS(14)18 HARDCOPY/PDF*					£305	
MECAS(14)17 HARDCOPY/PDF*					£305	
MECAS(14)16 HARDCOPY/PDF*					£305	
MECAS(14)07 HARDCOPY/PDF*					£305	
MECAS(14)06 HARDCOPY/PDF*					£305	
MECAS(14)05 HARDCOPY/PDF*					£305	
	TOTAL					

E=English; F=French; S=Spanish; R=Russian Prices are subject to changes.

* Please specify preferred version (Electronic versions are delivered on the date of release at the same price – Please state your E-mail address clearly).

ORDER FORM (Please use BLOCK letters)

Your Name ____

Company ____

Address ____

____

____

Telephone____________________**Fax**____________________

Email ____

Please register my order for the items as listed for a total amount of £____________________

☐ **Sterling cheque drawn on a UK bank**
☐ **Transfer to the Organization's bank account**
☐ **Card Payment (subject to 2.35% surcharge)**

ALL CHARGES TO BE PAID BY REMITTER

*__Sterling transfer__ to the Organization's bank account **No. 50500844**
*__Euro Transfer__ to the Organization's bank account **No. 86773833**
*__US Dollar Transfer__ to the Organization's bank account **No. 86402588**

Barclays Bank plc, Docklands Branch, 1 Churchill Place, London E14 5HP – Bank code: **20-26-46** - Account name: **International Sugar Organization**

IBAN Number: GB86 BARC 202646-50500844 **(Sterling)** - GB68 BARC 202646-86773833 **(Euro)** – GB91 BARC 202646-86402588 **(US Dollars)** - ***Swift Number:*** BARC GB22

Please debit my Visa/Master Card/Access

My credit card number is: ____________________________

Cardholder____

Expiry date ______/______ **Security code** _ _ _
(last 3 digits on the back of your card)

Signature

Print Name: ____

FAX ORDER FORM TO: +44 (0)20 7513 1146