



International Sugar Organization

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New Frontiers in Agricultural Technology

Market Evaluation Consumption and Statistics Committee (MECAS(20)05)

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In the last few years, a significant number of digital technologies have positively impacted the agricultural sector in drastic ways, permeating through the entire value chain – from production, to distribution to sales. These technologies present themselves as science-based intensification solutions to sustainability problems that challenge the agricultural sector today.

With advancements in computer technology and communications, a new frontier is emerging, driven by the real-time use of big-data and powerful and connected hardware. Different terms have appeared to describe this increasingly technological model of agriculture, such as Agriculture 4.0, which uses sustainable precision agriculture methodologies. This AgTech sector provides a wealth of opportunities for value adding in the sugar industry by promising to increase productivity of sugar crops while also ensuring greater environmental sustainability.

In this study, key drivers prompting innovation in AgTech are examined and major topics to which AgTech offers solutions are considered, such as agricultural productivity, data analytics, market linkages and financial inclusion. Relevant examples to the sugar sector are outlined and the importance of big-data, its value, and ownership are discussed.



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Fund Activity in the Sugar Market

Market Evaluation Consumption and Statistics Committee (MECAS(20)06)

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The purpose of this study is to give a detailed overview on the workings of futures markets, including sugar, and the participation of funds in markets.

Futures have played an important role in the market for over a century, and have gone through a number of evolutions during that time. Throughout, the futures market has remained an important risk management tool for commercial users. However, recently, the make-up of market participants has made the use of futures markets by commercial traders more challenging. Instead of producers/consumers or traders holding a pivotal position, either through better contacts or through a more-nuanced insight into the fundamental dynamics, it has become the domain of financially more robust, and frequently data-focused, operators. These operators are generally grouped together under the heading of funds. This MECAS study will focus on their activities and impact on financial markets including sugar.

The failure of financial markets during the 2008 crash has advanced the importance of market regulation. For financial markets based in the US, the sole authority is the Commodity Futures Trading Commission. It holds both a central oversight role as well as a data collection and dissemination function. The CFTC's Commitment of Traders report is a unique source for extracting positional and participation information of funds on an aggregate, but commodity-specific, level.

Another piece of today's market structure and activity level on financial markets is the operation and evolution of the exchanges, which manage the futures markets. The corporate objectives and the key metrics, along which the exchange operates, are briefly reviewed to complete the overview. Lastly, we will pull together the reported insights and conclude by surmising the impact of fund activity in the sugar market.

There were two previous studies on "Funds". The most recent was in 2008, which focused predominantly on the impact that investment funds were having in the expansion on the Brazil sugarcane industry at that time. The other paper, dated in 2000, was a copy of a speech by Jonathan Kingsman to the ISO seminar. But those were historic days, when traders dominated markets and funds dipped in-and-out.



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Sugar Market Development in China

Market Evaluation Consumption and Statistics Committee (MECAS(20)08)

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China is one of the largest economies in the world, second only to the US, with exponential growth over the past few decades, its annual GDP growth rate between 2008 and 2018 averaged 8.1%. Although, the pace of growth has slowed in recent years, it remains on a high level compared to many other developing countries in the world. China's economy has experienced a number of structural changes during recent years which have also had an impact on the food and agricultural sector. The decline of the working age population in rural areas, which started in 2015, together with increasing real wages requires a different approach when it comes to rural labour. China, in its drive towards self-sufficiency has achieved remarkable results in the expansion of agricultural production. But some of this increase has been at the expense of the sustainable use of the country's natural resources. Agriculture is the biggest user of natural resources such as land and water. These factors could affect the further growth and development of the agricultural sector. New policies, including new qualitative approaches, such as mechanisation, fertilisation of exhausted arable lands and innovations in agriculture could be a positive driver for future development.

Globally, China is a substantial growth market, including its domestic sugar market. Domestic production, consumption, imports and policy dynamics are all key to the outlook for the Chinese sugar balance. This study aims to uncover China's importance in the world sugar economy and explore the latest developments in the industry in order to make forward projections of the country's sugar balance.

In 2018, China cemented its position as the world's largest sugar net-importer, being the largest importer with total purchases of 5.2 mln tonnes of sugar from the world market. Although per capita consumption remains low, at 11.3 kg in 2018, as against a world average of 22.6 kg, China's sugar consumption demonstrated sustainable growth during ten consecutive years, from 2008 to 2018, averaging 2% annually. Declining production during the same ten years period by 2% annually was offset by higher imports with a growth rate (2008-2018) averaging 26% annually. In 2020, the new uncertainty owing to the Covid-19 pandemic has impacted global market developments in different areas, as separate reports have shown.

This study will present a general overview of China's sugar market, with an update on the recent market situation, the country's policy on sugar production and governmental support of the sugar industry, to demonstrate its importance in the world sugar economy, and show principal changes of its position on the world sugar map. A major aspect of the study will consist of the latest update on China's position in the global sugar market, an assessment of the recent policy trends with regards to domestic sugar production, the dynamics of sugar consumption, including recent trends and prospects in the use of caloric and non-caloric sweeteners, development in sugar trade, and finally, discover the main country's policy changes in terms of sugar market support.

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