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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(10)07 - Central American/Caribbean Sugar and Ethanol Prospects

The Central America and Caribbean (CAC) region, comprising eight countries in continental Central America and 10 countries in the Caribbean, is the world's second-largest net sugar exporting region, after South America. This study is the first ISO paper dedicated to the CAC region and provides an overview of key developments in the regional sugar and ethanol markets, aiming at a better understanding of their potential impact on production and future export availability. The study also assesses the role of the region in preferential trade with the US and Europe for sugar and ethanol as well as the latest on bagasse cogeneration activities.

MECAS(10)06 - World Trade in Raw and White Sugar - Recent Trends and Prospects

In the new study, using a comprehensive database of white and raw sugar imports and exports on the October/September basis (including data for about 175 countries and territories for the period from 1999/00 to 2008/09) the ISO re-examines long-term trends of white and raw sugar trade, which have been identified in a number of previous ISO studies. The projection for the trade balance for two market segments in for 2009/10 has been also prepared.

MECAS(10)05 - GM Beet and Cane: Prospects in a New Market Environment

Only the United States and Canada have commercialised GM sugar crops – Roundup Ready sugarbeet. GM sugarbeet achieved a remarkable 95% adoption in these 2 countries in 2009, in only its third year of commercialization. In Europe, transgenic beet awaits approval for commercial planting. Several key cane sugar producing and exporting countries have embraced gene transfer technology to varying extents, but commercial varieties remain at least 5 years away. Both the beet sugar and cane sugar industries perceive that access to genetically modified varieties will be essential to improving productivity and lowering their costs of production. Traits likely be introduced in GM beet and cane include disease resistance, insect resistance, nematode resistance, higher sucrose content, drought tolerance and cold tolerance, amongst others.

MECAS(09)19 – The International Physical Trade of Sugar – a Survey

This paper reviews the major changes and trends in the world trade flows of raw and white sugar over the past decade, the role and impact of existing and new drivers of the physical trade as well as changes in the composition of the trade by main category of sugar exporter and sugar importer. The paper also contains a comprehensive update on destination refining capacity by country and volumes, sugar traded by type (including VHP, crystals and higher quality whites) and sugar trade matrices by origin and destination. An analysis of freight rates as well as premium and discounts data is also provided by the study.

MECAS(09)18 – Domestic Sugar Prices

The study provides information on domestic prices at both retail and wholesale level in about 70 countries representing 75-80% of world consumption in the period from 2002 to 2008. Apart from being a reference paper on domestic prices, the study also identifies links between world and domestic prices focusing on the correlation between them.

MECAS(09)17 – Market Potential of Sugarcane & Beet Bio-products

Industrial biotechnology is of immediate interest to the world sugar industry as it potentially offers new revenue streams for "bio-products" using sugarcane and beet as a renewable feedstock. Key opportunities are identified as the production of bioplastics, biochemcials such as BDO (1,4 butanediol), cellulosic ethanol from sugarcane bagasse; as well as butanol, and biodiesel from bagasse.

MECAS(09)07 – Sugarcane ethanol and food security

The extent, if any, to which sugarcane ethanol contributed to food price escalation during the 5 year commodity boom ending mid last year is ascertained in this study. The recent commodity cycle is reviewed and how it led to perceptions of an escalating food security crisis via food inflation. The drivers behind the price escalation are then identified, including biofuels. Evidence is compiled that suggests the links between increasing use of cane for fuel ethanol– chiefly in Brazil – is not impacting on sugar prices or food prices generally.

MECAS(09)06 - Oulook on Brazil's Competitiveness in Sugar and Ethanol

This paper reviews the Brazilian sugar cane industry and its role in the global sugar and ethanol markets. It begins by discussing sugarcane production indicators, such as cane areas, production by region, cane yields, the development of new cane varieties, sugar cane prices, environmental legislation, competitiveness of sugarcane as against other crops and land competition with other crops. Issues such as the maximisation of the sugar/ethanol/cogeneration interface as well as the impact of the credit crunch on financing for future expansion and the increasing role of foreign direct investment in the industry are also scrutinized. The second part of the paper presents a comprehensive analysis of the five major drivers impacting Brazil's competitiveness in sugar and ethanol in the world market

MECAS(09)05 - Cogeneration - Opportunities in the World Sugar Industries

The study provides a survey of already installed cogeneration capacity in the sugarcane processing sector as well as existing development plans in a number of countries in different parts of the world. It shows that bagasse-based production of electricity for export to the national grid is fast becoming a major activity of sugar mills. In technical terms, the amount of energy that can be extracted from bagasse is largely dependent on the amount of processed cane and the technology used for energy production. Crucially, only the use of high-efficiency boilers generating extra high pressures and temperatures allows production in excess of the captive consumption of a mill. On the other hand, the success of cogeneration by sugarcane mills is fully dependent on the existing legal framework and the prevailing electricity market rules.

MECAS(08)18 – EU Sugar Policy Reform – Ramifications for Preferential Exporters

The study assesses the impact of the EU sugar policy reform on exporters benefiting from preferential access to the EU market, such as those under the ACP Sugar Protocol/EPA and the EBA Initiative for the LDCs. Existing programmes of production expansion in preferential exporters are reviewed and potential changes in sugar export availability as well as values of preferential exports to the EU are discussed. The study concludes that by 2015 with the realization of announced expansion projects, preferential exporters would increase considerably sugar deliveries to the EU. Despite the drop in preferential prices, the value of sugar exports by EPA/EBA countries are expected to grow as well.

MECAS(08)17 – The International Trade of Fuel Ethanol: Outlook to 2015

This paper provides an outlook for consumption, production, export availability and import demand as well as an indicative world fuel ethanol trade balance to 2015. Current market conditions and drivers of the global fuel ethanol trade are also scrutinized in the paper. These include production capacity by region, consumption growth, government legislation, the world price environment and tariffs, feedstock use, preferential trade and non-market issues like sustainability standards, certification methods and infrastructure projects.

MECAS(08)16 – US Sugar under the 2008 Farm Bill: National and International Implications

US sugar policy has long acted to support US prices of sugar well above world market level. Because the program's effectiveness would be challenged when all sweetener trade between the US and Mexico were removed starting 1 January this year, limits to the 2008 Farm Bill contained the most substantial change to the US sugar programme in more than 30 years. Over the longer term the market implications and sustainability of the new US sugar provisions will be determined by how much surplus sugar is generated.

MECAS(08)07 - India's Future Role in the World Sugar Trade

This study assesses India's sugar market outlook to 2015 with a view to understanding its potential to become a major regular exporter of sugar. The world sugar market is highly sensitive to developments in India in 2007/08 as the country is responsible for a large share of the global surplus. In particular the country is already exporting significant volumes of sugar to the world market and may become a major supplier. Key issues to be assessed in the study will include: a changing industry structure after massive investment into the processing sector in the middle of the current decade; how competitive India's sugar is internationally; how fast India may develop a proper export infrastructure to cope with large-scale exports of both white and raw sugar; and how India's notorious sugar cycle, driven by weather and government interventions, can be mitigated.

MECAS(08)06 – Investment Funds and the World Sugar Economy

This paper assesses the influence of a select group of investment funds – hedge funds, index funds and private equity funds - in the world sugar economy. It describes the increasing involvement of hedge and index funds in sugar futures contracts as well as recent developments on private equity investment across the world sugar and ethanol industry. The paper also appraises the link between greater hedge and index fund involvement in sugar futures and sugar price movements.

MECAS(08)05 - Sugarcane Smallholders in Sub-Saharan Africa: Status, Challenges and Strategies for Development

The sugar industries of Sub-Saharan Africa differ considerably in scale and also in terms of the number of smallholders involved in sugar cane production and smallholder outgrower scheme design and modalities. The objective of this paper is to identify and investigate these factors which often contribute to low productivity by smallholder cane growers and can even threaten financial viability for some.

PROCEEDINGS OF PREVIOUS ISO SEMINARS AND WORKSHOPS

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2007 "*A Shining Future for Sugar and Ethanol – Realities and Myths"*

WORKSHOPS: 2009 "Selected Issues Impacting on the Sugar/Ethanol Economy"
2008 "Future Options for the World Sugar Economy"

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SPECIALS: 2009: **ISO/Egypt International Conference – Proceeding**
"World Perspectives for Sugar Crop as Food and Energy"
Per CD-ROM/Online £170

2008: **Research on Sugarcane Derivatives** by Cuban Institution for Research of Sugarcane Derivatives (ICIDCA) £175 per CD

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