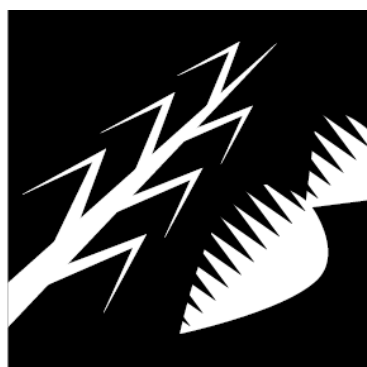


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This paper reviews the major changes and trends in the world trade flows of raw and white sugar over the past decade, the role and impact of existing and new drivers of the physical trade as well as changes in the composition of the trade by main category 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, biochemicals 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 - Outlook 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.

**MECAS(07)18 - Outlook for the White Sugar Premium after the EU Sugar Reform**

The outlook for the white sugar premium - the price differential between white and raw sugar traded internationally- is vital at a time when the world sugar market is undergoing radical change associated with reform of the EU sugar regime and the consequent drastic reduction in exports of EU white sugar. In this study changes in both long-term and short term drivers for the white sugar premium are reviewed and analysed. Special attention is given to the growing role of destination refineries and higher ocean freight rates. The study argues that the removal of EU white sugar from the white/raw sugar equation is not likely to change the “boom and bust” logic of comparative availability, the main long-term driver of the white sugar premium.

**MECAS(07)17 - Government Biofuels Policy and Sugar Crops: Outlook to 2015**

Countries all around the world are looking seriously at increasing use and production of biofuels and many governments have implemented policies to ensure biofuels become an important segment of their transport fuels mix. The nature of the policies governments adopt to create and develop a fuel ethanol market and the incentives offered to ensure sufficient investment in ethanol production are the central focus of this paper. Projections to the year 2015 show booming fuel ethanol consumption based on the market development incentives and explicit inclusion targets identified in the analysis.

**MECAS(07)16 - Import Dynamics and World Sugar Prices**

This paper examines the economics of sugar imports by type of sugar – raws or whites – and how it is linked to world sugar prices as well as the final c.i.f. price of imported sugar. It analyses the level of import demand response by region, including the impact of preferential trade as well as world prices on imports.

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