International Sugar Organization

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  This publication will offer over 120 pages of comprehensive worldwide statistics and analysis on fuel ethanol. The Ethanol Yearbook 2012 will compile data on world production, consumption and trade as well as individual national balances with data series on production, import, export, consumption, stocks and prices for key countries. Additional tables with data on ethanol content in cane, sugar cane pricing, mandated biofuel inclusions, alternative feedstocks and ethanol vs. sugar realization, among others, are also included. ***Available in electronic version (PDF format).***

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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(11)07 – South American (excluding Brazil) – Sugar and Ethanol Prospects

This is the first ISO study on South American (excluding Brazil) sugar and ethanol. It provides forecasts for sugar production, consumption and trade by 2020 for the 11 countries in the region, detailing fuel ethanol developments and the sugar/ethanol policy framework. The paper also looks at alternative sweeteners, preferential trade, cane payment structures and prospects for cane bagasse co-generation.

MECAS(11)06 – Government Sugar Trade Related Policy in a New Market Environment: a Survey

A tight global sugar market balance over the past 2 years has put global and national sugar markets under extreme pressure, resulting in extremely high sugar prices. Governments have mainly attempted to moderate price gyrations for consumers and to ensure supply by adjusting sugar trade policy. Actions have included the removal or reduction of import tariffs and the expansion of existing, or the opening of new, tariff rate quotas. Several governments have also released strategic stocks into the domestic market.

MECAS(11)05 – Niche Sugar Markets

In this ISO study niche markets for sugar and sugar derivatives, their production and handling meeting more rigid and demanding environmental and social standards, are analysed. The paper first discusses organic sugar and then Fairtrade sugar with a special focus on their supply availability and demand potential. The final chapter is dedicated to an emerging niche product – sugar certified as sustainable. After providing information on non-sugar specific international certifiers, then attention is focused on Bonsucro as an international sugar crop specific certification system providing sustainability certification to producers of cane sugar and sugar cane derived products.

MECAS(10)19 - Fuel Ethanol Prices and Drivers - a World Survey

Monitoring and understanding the key drivers of domestic ethanol prices in major producing and consumpting countries is crucial to gauge the extent of any links between sugar and energy markets, and also to ascertain the prospects for global fuel ethanol trade. Key drivers impacting price levels and dynamics in the three major players – the US, Brazil and the EU - include amongst others: crude oil and gasoline prices, market size and structure; government incentives and price setting arrangements; as well as feedstock price variability. The confluence of these market and government policy related price drivers are unique for each player and are analysed in detail in this study.

MECAS(10)18 - Industrial and Direct Consumption of Sugar - an International Survey

There is almost a complete lack of data on industrial consumption in the public domain. A new ISO study is correcting this dearth of knowledge and the ISO presents data collected from about 30 countries and the EU over the period of 5 years starting from 2005. The countries in the survey represent all geographical regions and include both developed and developing countries, net-exporters and net-importers of sugar. The surveyed countries were responsible for 70% of global sugar consumption in 2009. The collected data show that, despite significant regional disparities, at the global level a growth of industrial indirect consumption through sugar-containing products is faster than that of direct consumption while the soft drinks industry keeps its leading role as industrial users of sugar.

MECAS(10)17 - World Sugar Demand: Outlook to 2020

This paper presents the new revamped version of the 2010 ISO Sugar Consumption Model. The study provides an individual evaluation of all major drivers of sugar consumption, namely income and population growth and their respective elasticities, domestic retail sugar prices, level of urbanization, prices of substitutes such as HFCS, non-centrifugal sweeteners, HIS, age structure of the population, impact of industrial and direct consumption on growth rates, as well as differences in consumption trends in net importers compared to net exporters. Based on time-series data with over 35,000 observations, the paper uses a comprehensive set of econometric estimations to estimate future sugar demand for over 150 countries until 2020, arguing why world sugar consumption growth will remain firm but slower than the past 10 year-average.

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 - 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.

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.

PROCEEDINGS OF PREVIOUS ISO SEMINARS AND WORKSHOPS

SEMINARS:	2010	*"Crunch time goodbye - Sugar and Bioenergy flying high?"*
	2009	"Crunch time for Sugar and Ethanol"
	2008	"Sugar & Ethanol from Doom to Boom"
WORKSHOPS:	2010	*"The African Sugar Economy: Stock Taking and Potential for Development"*
	2009	"Selected Issues Impacting on the Sugar/Ethanol Economy"
	2008	"Future Options for the World Sugar Economy"

See full list: http://www.isosugar.org/Publications/publication.aspx

SPECIALS: 2009: **ISO/Egypt International Conference – Proceedings**
"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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