

Sugar Industry in India 2018 with data on Country Wise Production Split (Brazil, India, Thailand, European Union, China, Others) and Company-wise Segmentation (Shree Renuka, Bajaj Hindustan, Balramput Chini, Triveni, Dhampur Sugar, Others)

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Abstracts

Market Insights:

India is the second-largest manufacturer and largest consumer of sugar, globally. The Indian sugar market consists of 453 sugar mills, among which 252 mills operate in the co-operative sector, 134 mills operate in the private sector, and the remaining operate as public sector companies, for manufacturing sugar, 'khandsari' and 'gur'. According to Netscribes, India has produced 415 MMTs (million metric tons) of sugar in MY 2018-2019, from an area of 5.2 Mn hectare, due to a good monsoon season, and availability of high-yielding cane varieties, especially in Uttar Pradesh and Maharashtra. Sugar production is expected to increase by 4.2% YoY in MY 2018-19 resulting to 33.8 MMTs. Sugar consumption is also likely to increase by 3.9% YoY in MY 2018-19, reaching the mark of 27.5 MMTs owing to growing population, higher income, and rising demand from wholesale buyers, the food processing industry, restaurants, and regular households.

Sugar Industry in India 2018

Export-Import:

Owing to increasing domestic consumption of sugar, imports have shown an increasing trend while exports have shown a declining trend during the period FY2014-FY2018. Somalia, Belgium, Sudan, and Nepal are the main export destinations of sugarcane

products from India. On the other hand, the highest sugar imports come to India from Brazil, Germany, China, and the USA.

Government Intervention:

In India, there are several government initiatives which are trying to stabilize sugar prices, reduce cheaper imports, promote surplus stock clearance, improve the cash flow of sugar mills, ensure timely payment to farmers, and reduce sugarcane arrears. However, the Indian government sets the target for manufacturing sugar irrespective of the demand, thus leading to overproduction in the country. Moreover, dealers are not allowed to hold onto stock beyond 30 days thus compelling excessive sugar supply in the retail market. During 2017, monthly average domestic sugar prices stood at INR 35,733 per tonne, which declined significantly by ~16.2% in March 2018 due to surplus production.

Companies covered:

Avadh Sugar & Energy Ltd.

Bajaj Hindusthan Sugar Ltd.

Balrampur Chini Mills Ltd.

DCM Shriram Industries Ltd.

Dhampur Sugar Mills Ltd.

E.I.D. Parry India Ltd.

Mawana Sugars Ltd.

Shree Renuka Sugars Ltd.

Triveni Engineering & Industries Ltd.

Upper Ganges Sugar & Industries Ltd.

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