

Explore, Innovate & Sustain In Sugar Industry



**PRAKASH NAIKNAVARE
MANAGING DIRECTOR**

**NATIONAL FEDERATION OF COOPERATIVE SUGAR
FACTORIES LTD. (NFCSF)**

**Sugar & Ethanol India Conference, 2024
Chini Mandi – 1st – 2nd February, 2024**

EPICENTER OF GLOBAL SUGAR



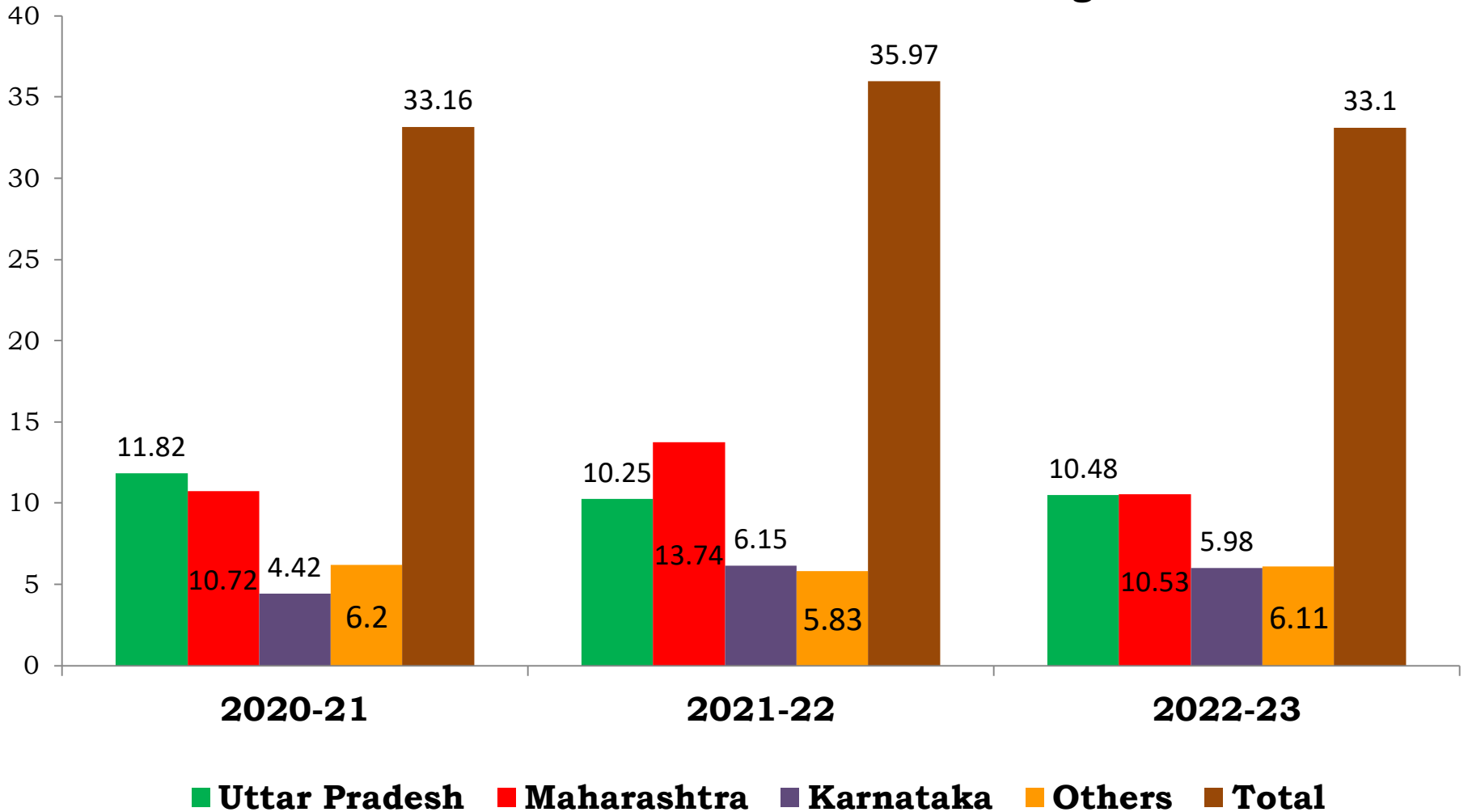
INDIA IS THE EPICENTRE OF THE WORLD SUGAR SWEETS

- India stands as the world's second-largest sugar producer, contributing over 18% of global sugar production.
- Additionally, India holds the position of the largest consumer of sugar, with a weightage of more than 16% in global sugar consumption.
- The absence of India in the international market results in a significant surge in sugar prices globally.
- Currently, Brazil is capitalizing on India's absence by achieving record sugar production & exports in the current season.

- India is strategically shifting focus towards diverting sugar into ethanol production rather than prioritizing exports.
- Till ethanol prices are more lucrative, India will be absent from the world sugar market.
- This shift aligns with the Brazilian model, which prioritizes Ethanol production over sugar exports.
- In the hindsight sugar season (2022-23) would have been more profitable for sugar mills if the decision was made to export sugar instead of producing Ethanol..... Just a food for thought !!

80% SHARE OF INDIA'S SUGAR PRODUCTION

Figs. in Million Tons

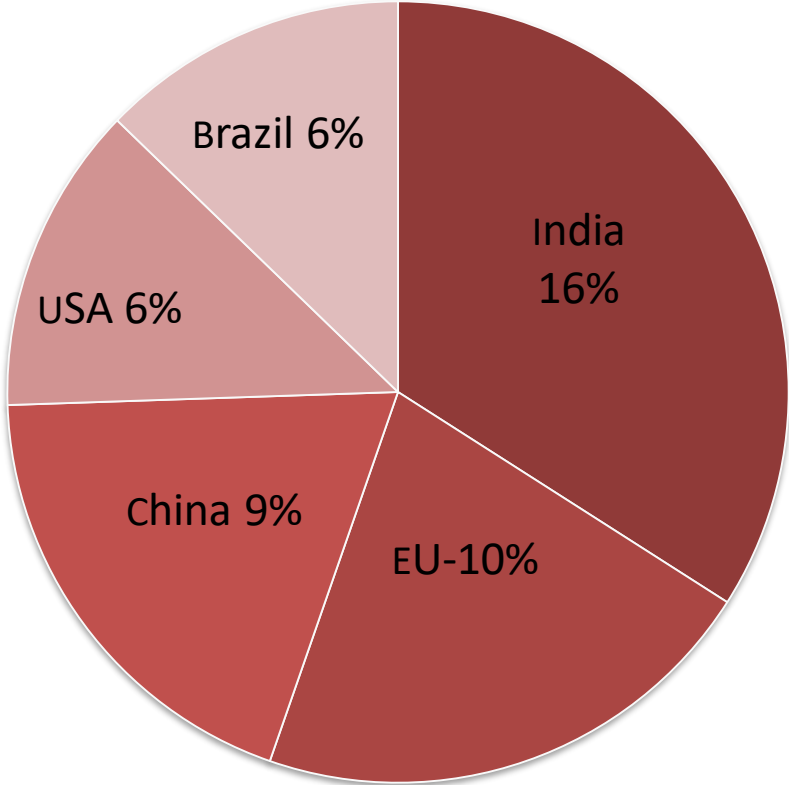
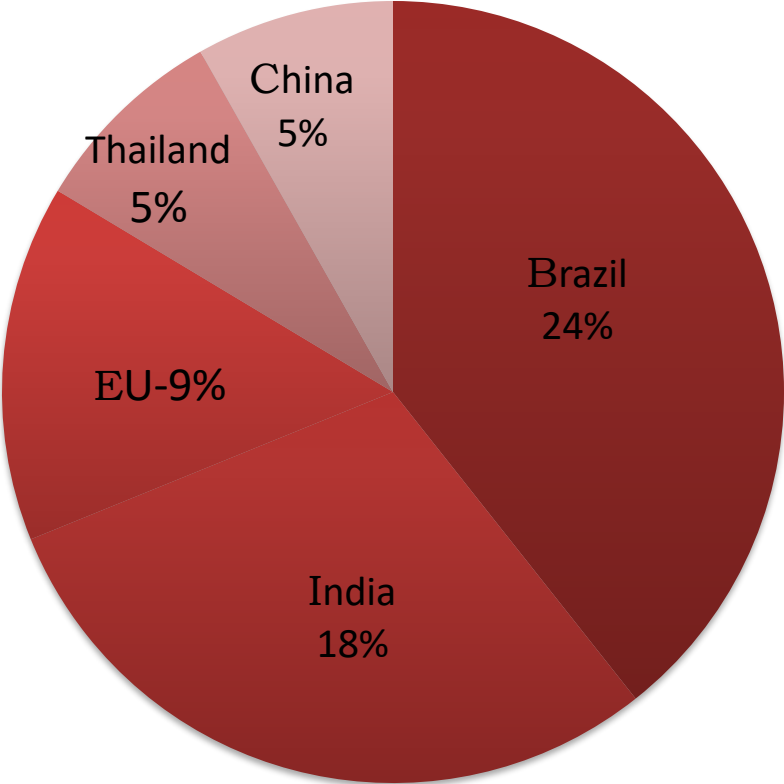


TOP 5 GLOBAL SUGAR PLAYERS

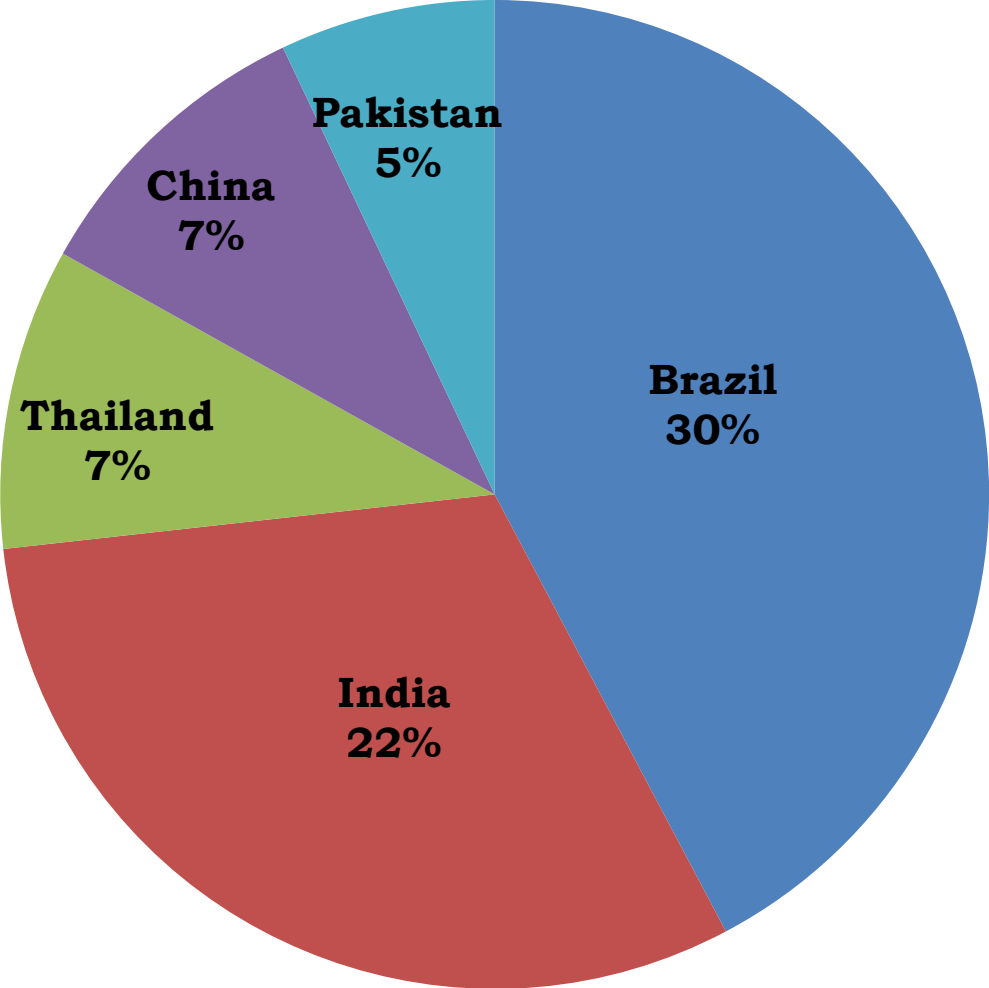


LARGEST SUGAR PRODUCERS

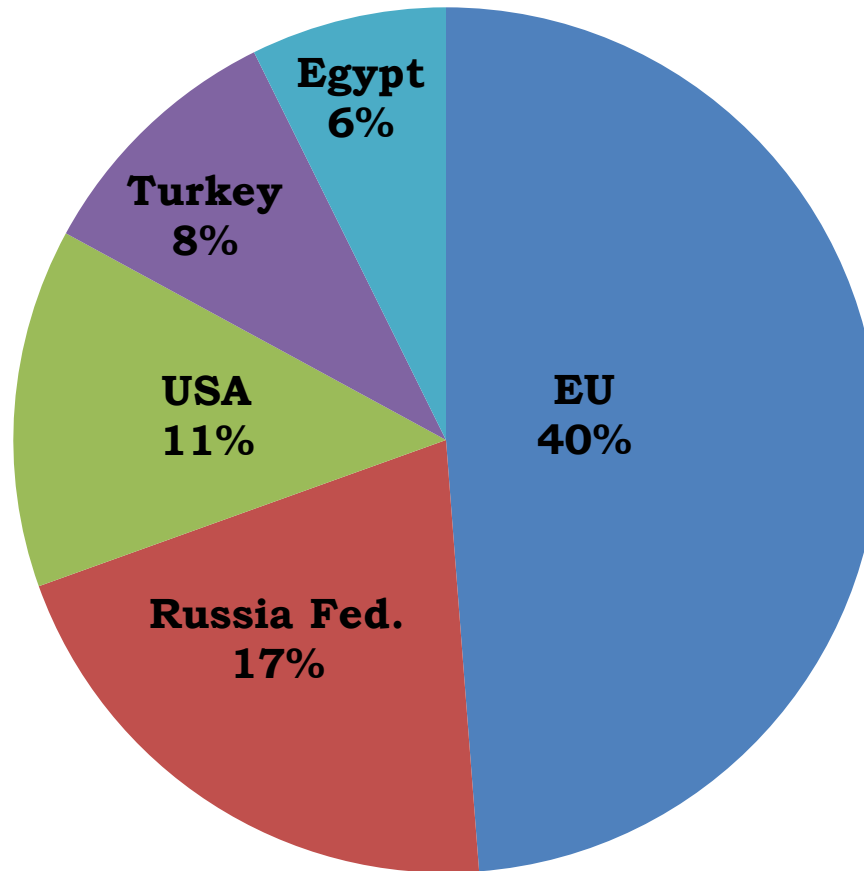
LARGEST SUGAR CONSUMERS



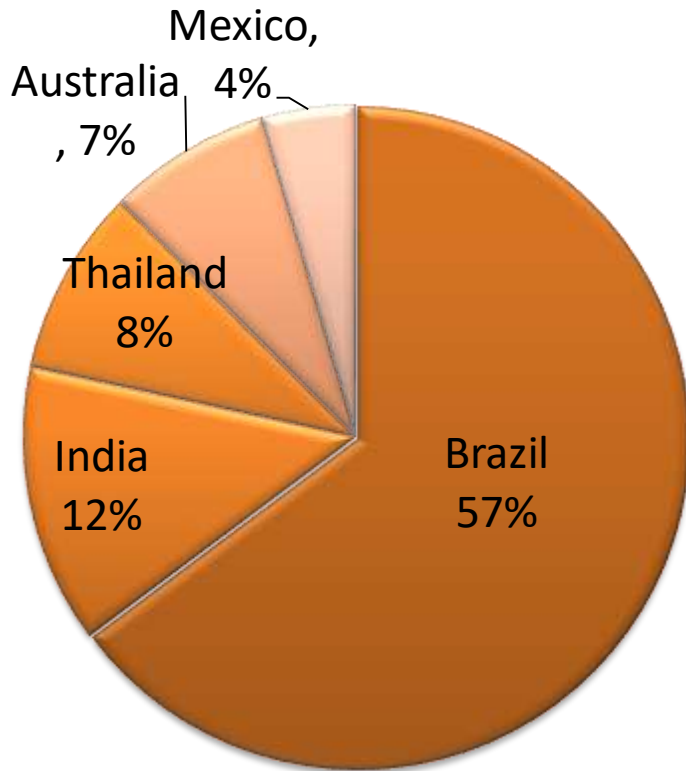
LARGEST CANE SUGAR PRODUCERS



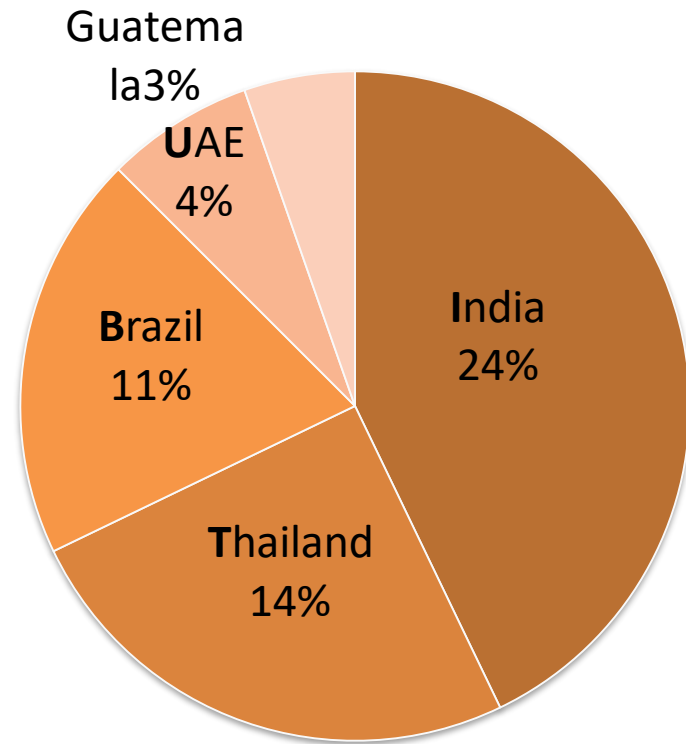
LARGEST BEET SUGAR PRODUCERS



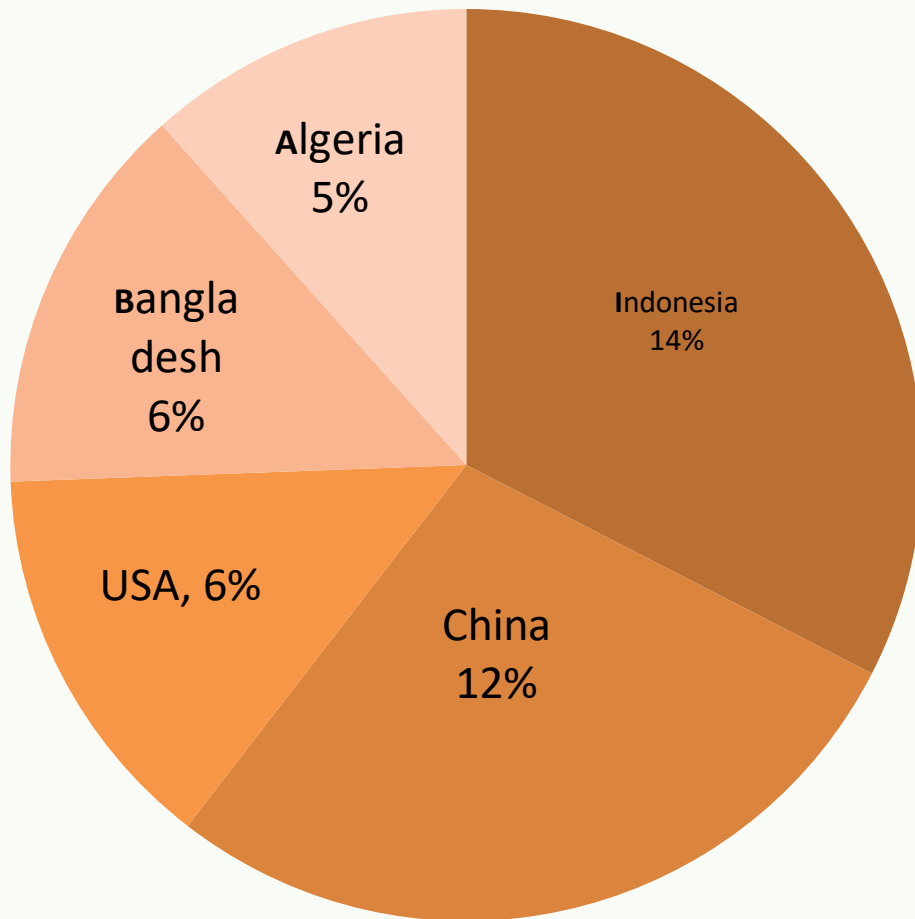
RAW SUGAR EXPORTERS



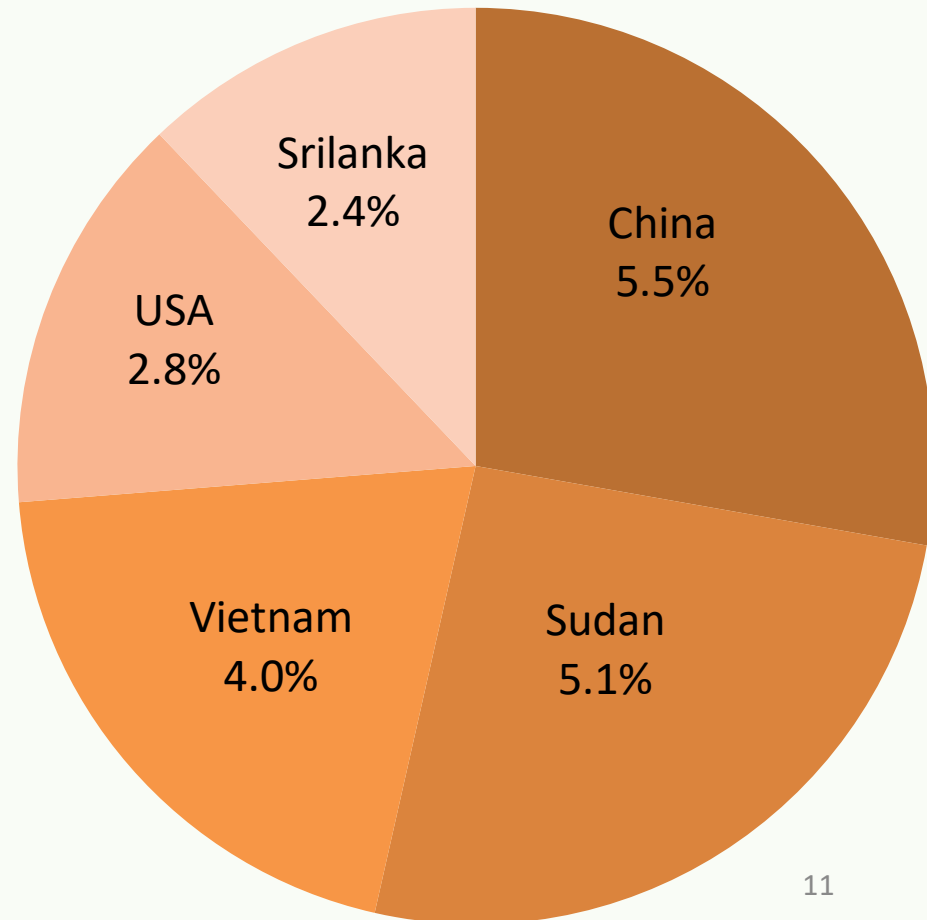
WHITE SUGAR EXPORTERS



RAW SUGAR IMPORTERS



WHITE SUGAR IMPORTERS

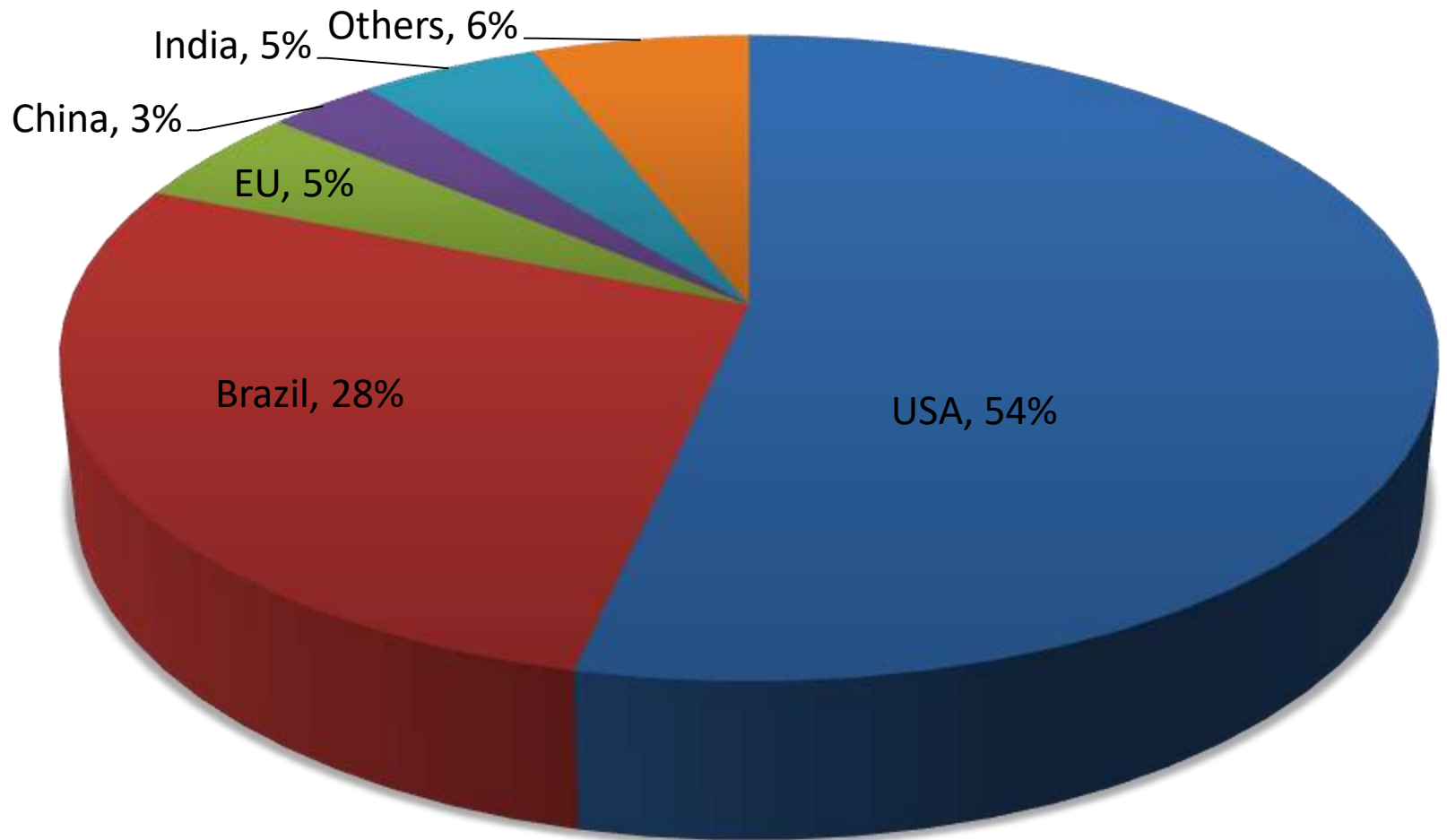


- ✓ Cane sugar contributes 80% of the total sugar production
- ✓ Beet sugar contributes 20% of the total sugar production
- ✓ World average per capita consumption is 22.1 Kg

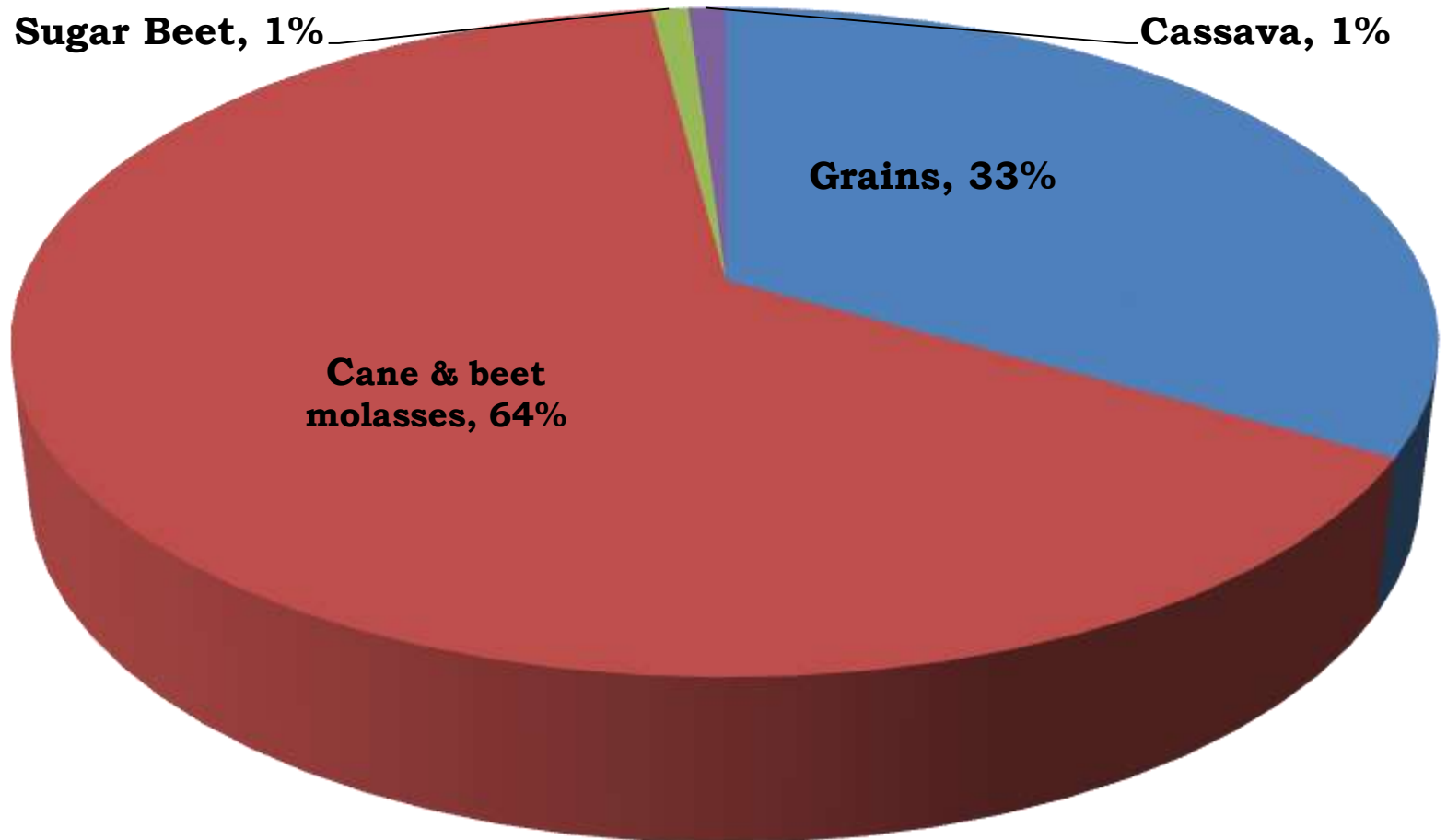
TOP 5 GLOBAL ETHANOL PLAYERS



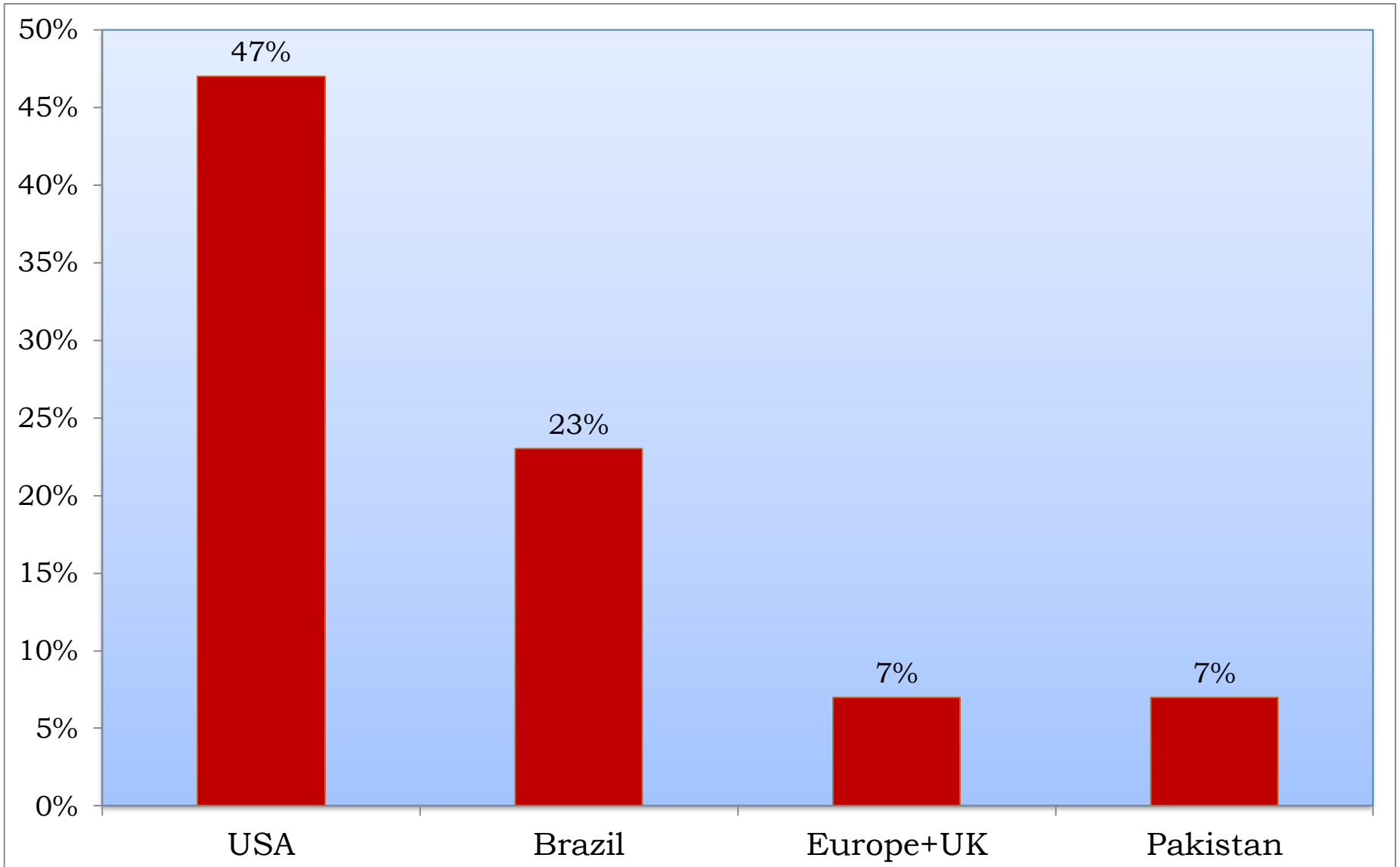
TOP 5 PRODUCERS OF ETHANOL



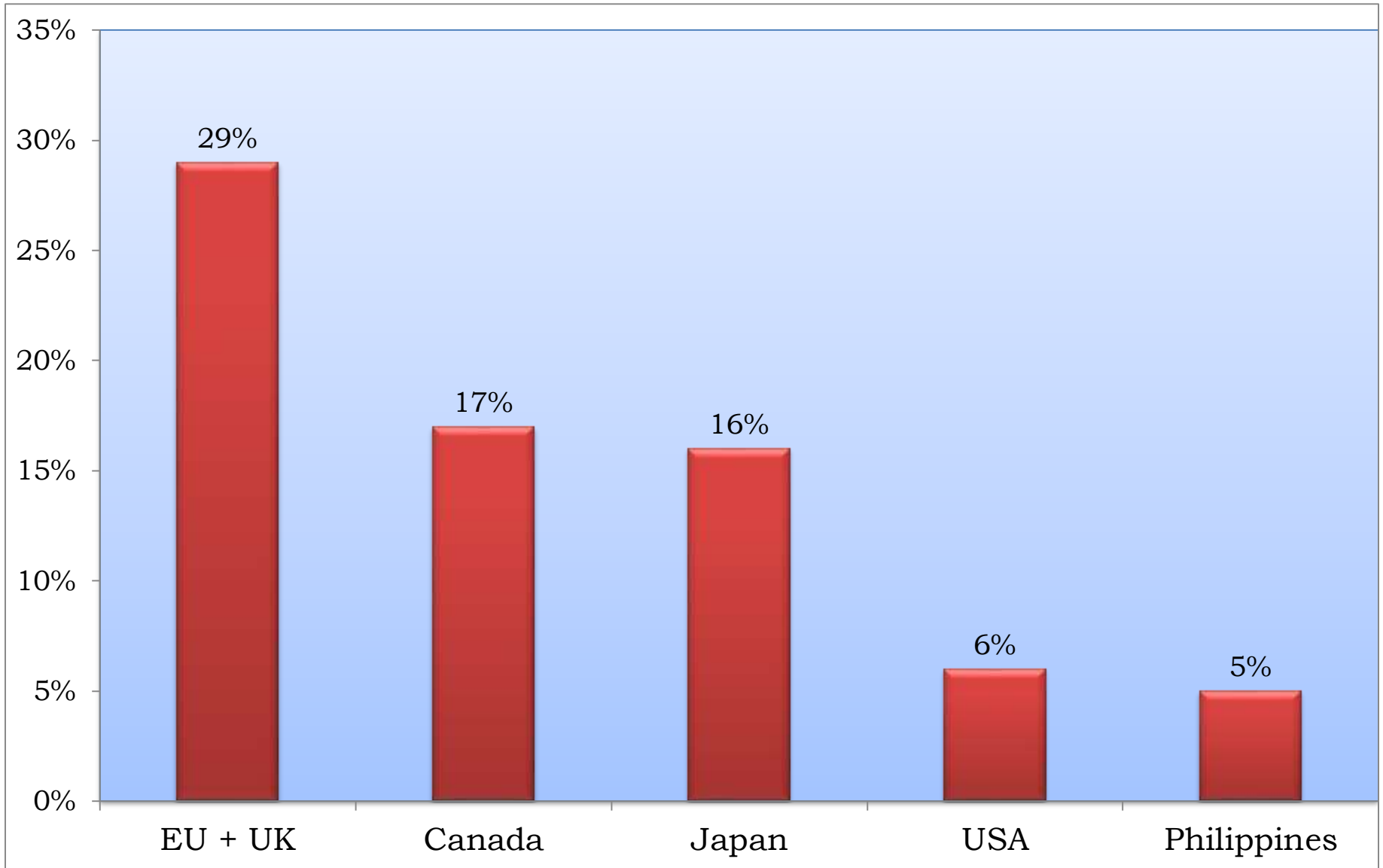
USE OF FEEDSTOCKS FOR PRODUCTION OF ETHANOL



TOP ETHANOL EXPORTERS



TOP ETHANOL IMPORTERS





GLANCE ON INDIAN SUGAR SCENARIO

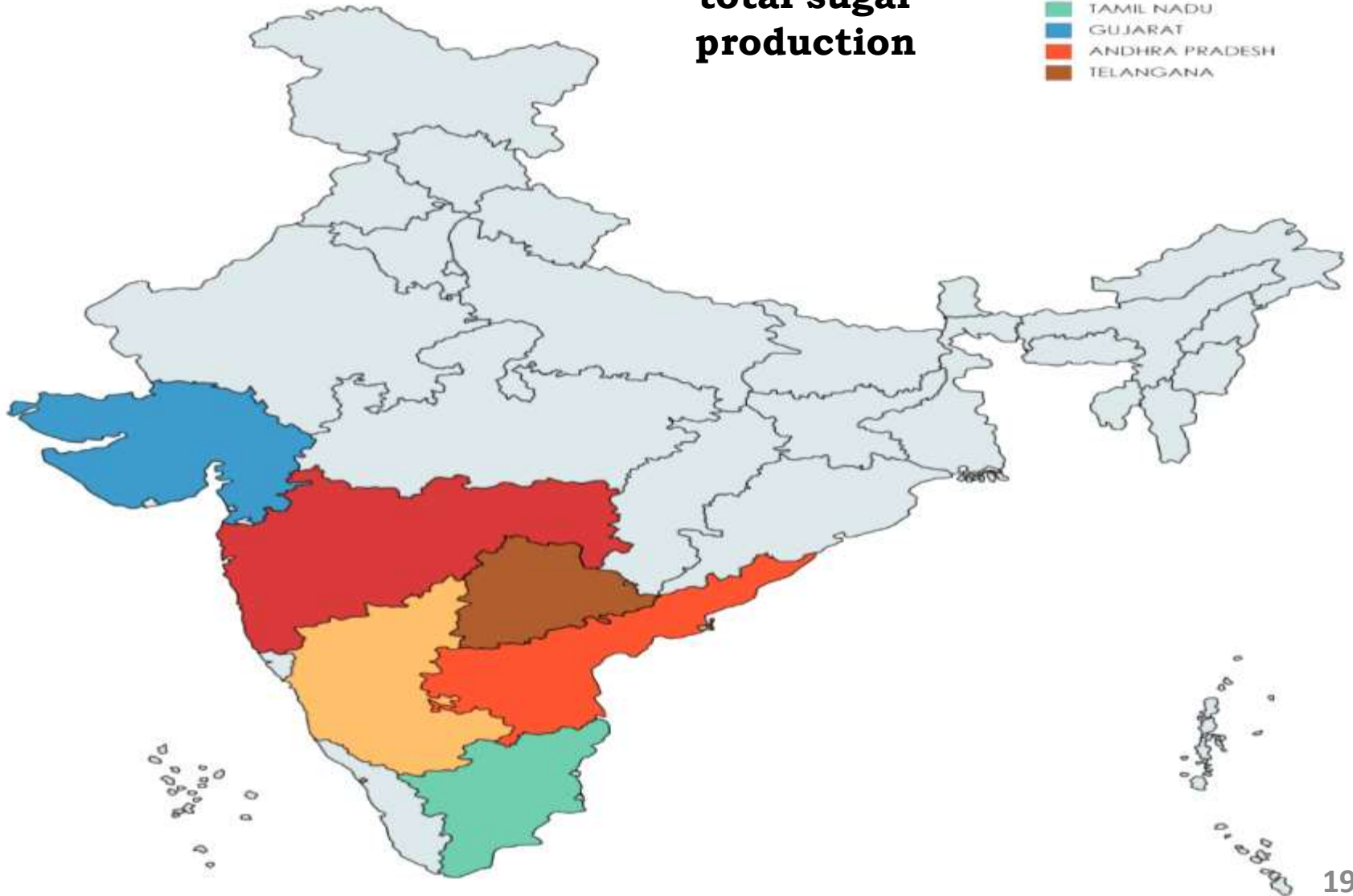


TROPICAL

**59% share in
total sugar
production**

TROPICAL

- MAHARASHTRA
- KARNATAKA
- TAMIL NADU
- GUJARAT
- ANDHRA PRADESH
- TELANGANA

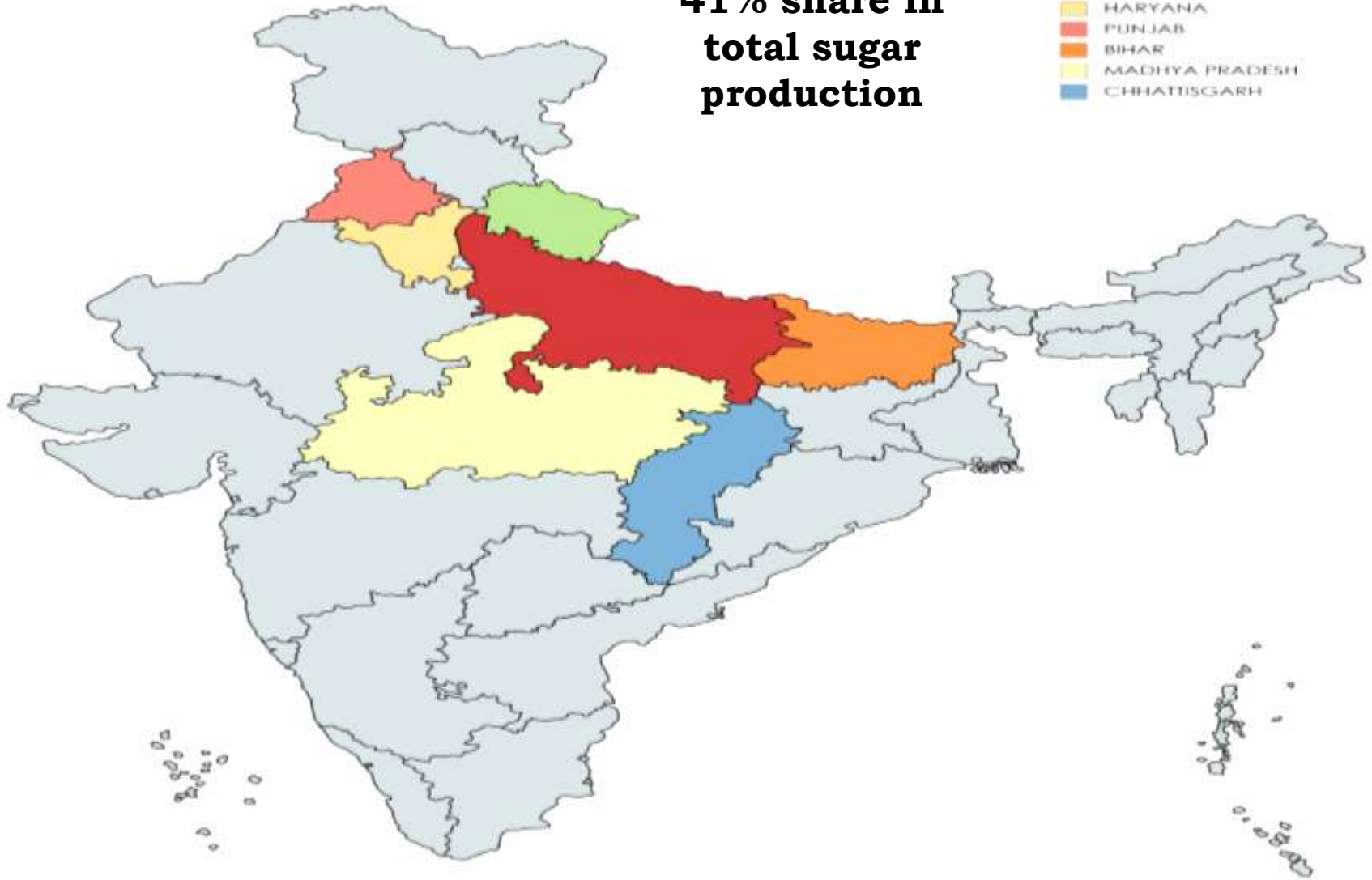


SUB - TROPICAL

**41% share in
total sugar
production**

SUB - TROPICAL

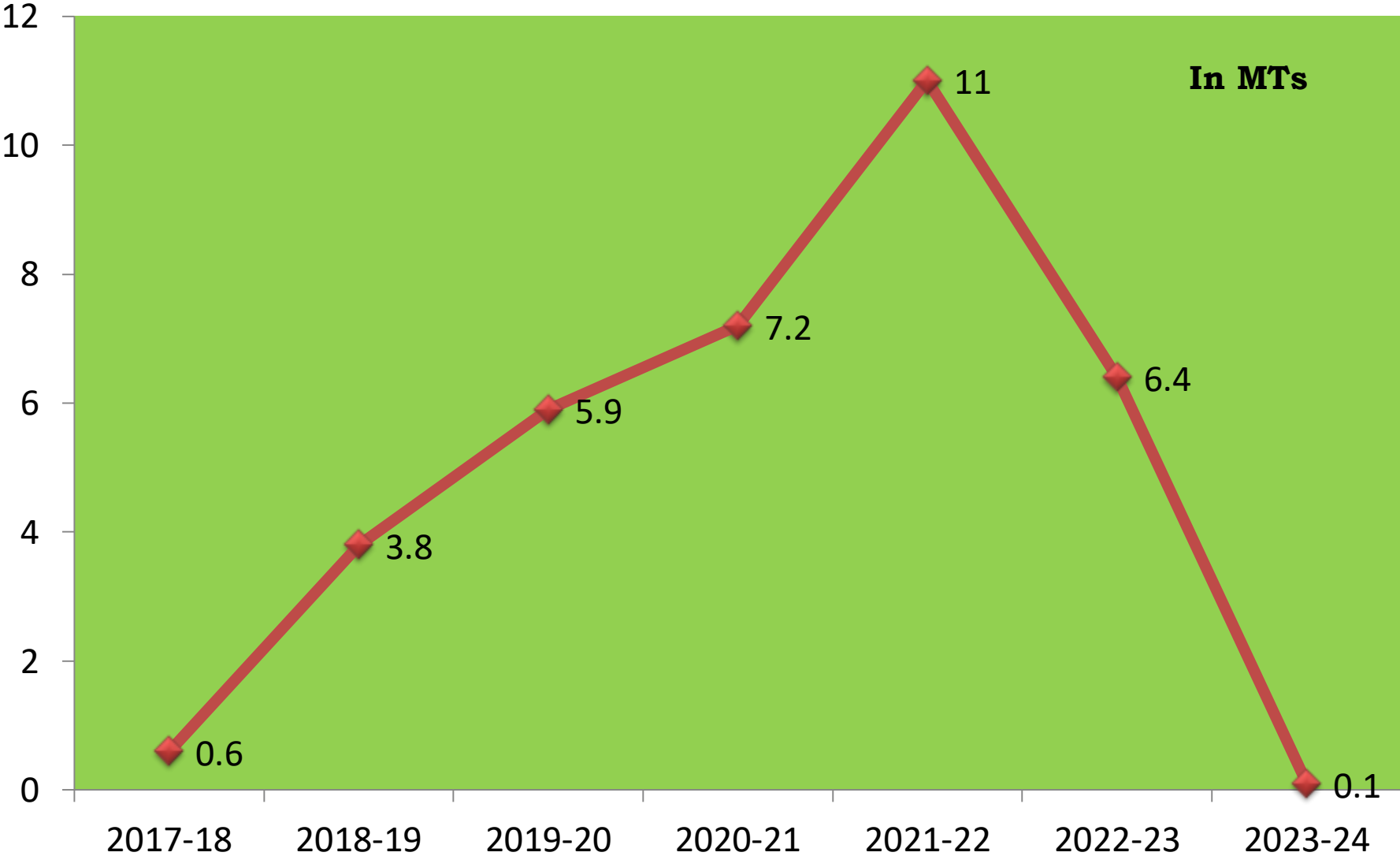
- UTTAR PRADESH
- UTTARAKHAND
- HARYANA
- PUNJAB
- BIHAR
- MADHYA PRADESH
- CHHATTISGARH



LATEST GLIMPSE ON SUGAR SEASON 2023-24 (OCT-SEP)

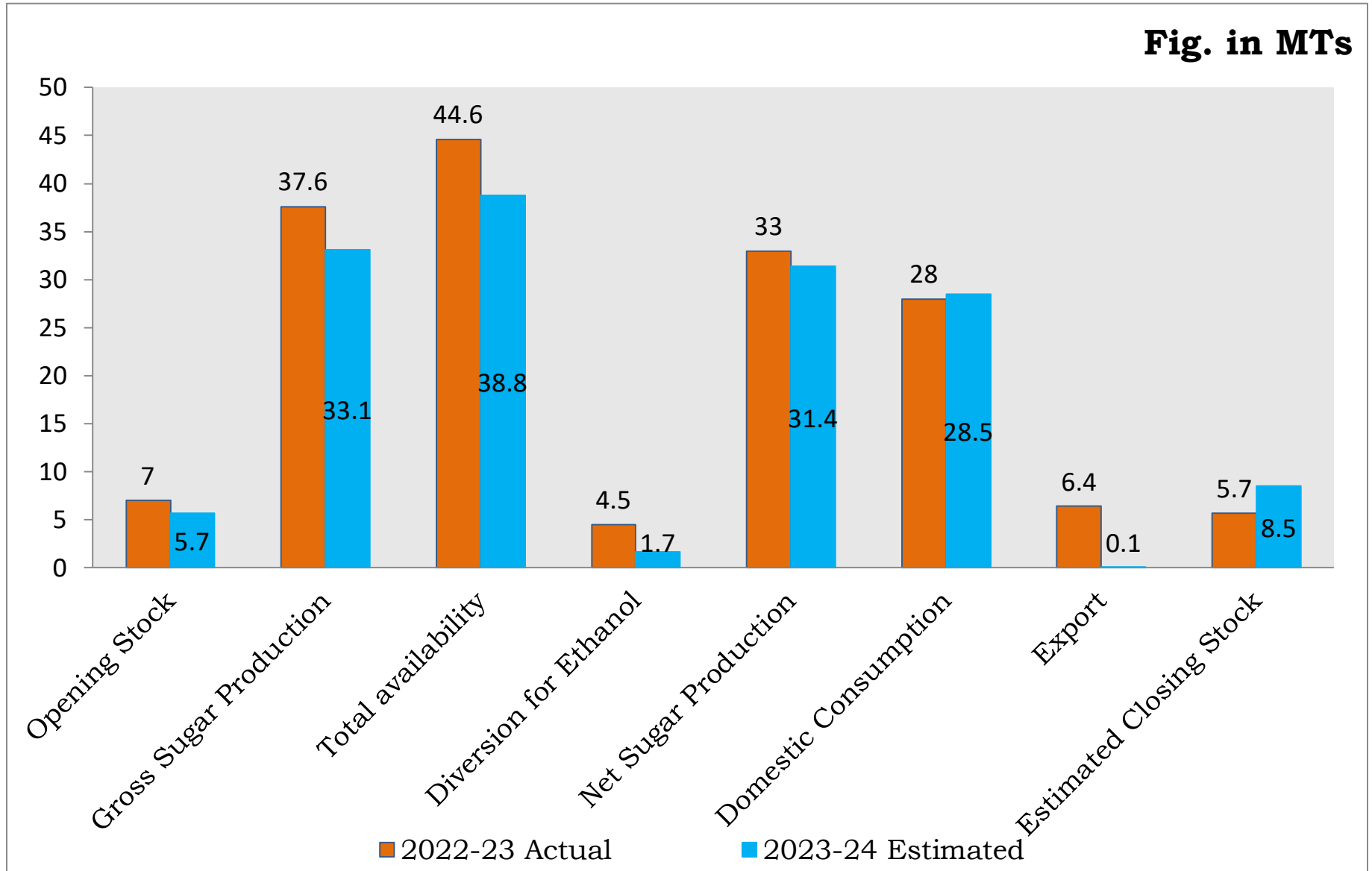
S.no	Particulars	VALUE
1	Area	5.9 Mha
2	Cane Production	434.0 MTs
3	Yield	74 T/H
4	Number of sugar mills	520
5	Gross Sugar Recovery	10%
6	Sugar Production (Net of Ethanol Diversion)	31.40 MTs
7	Domestic Sugar consumption	28.5 MTs
8	Exports	0.1 MTs
9	Ethanol Supply by the sugar mills	1.57 Billion Litres
10	Ethanol Blending %	10.50%

SWINGING SUGAR EXPORTS



INDIA SUGAR BALANCE SHEET AS ON 31-01-2024

Fig. in MTs



STATEWISE CRUSHING REPORT FOR THE SUGAR SEASON 2023-24 AS ON 31-01-2024

State	Total Number of Mills in crushing		Actual Cane crushed (MTs)		Sugar Production (Mts)		Average Sugar Recovery (%)		Estimated Sugar Production (MTs)	Actual Sugar Production (MTs)
	2023-24	2022-23	2023-24	2022-23	2023-24	2022-23	2023-24	2022-23	2023-24	2022-23
Uttar Pradesh	120	117	57.36	55.33	5.77	5.09	10.05	9.20	11.5	10.48
Maharashtra	207	206	67.60	75.69	6.49	7.38	9.60	9.75	9.5	10.53
Karnataka	65	73	37.74	39.01	3.68	3.94	9.75	10.10	4.5	5.98
Others	125	127	300.50	308.46	2.78	2.92	9.25	9.47	5.85	6.1
All India	517	523	463.21	478.49	18.715	19.33	4.04%	4.04%	31.35	33.09
Contribution by Top Three Sugar Producing States	75.82%	75.72%	35.13%	35.53%	85.15%	84.89%	9.79%	9.65%	81.34%	81.57%

Note: Few mills in Karnataka & Gujarat have concluded crushing.



Thanks for your patience

PRAKASH NAIKNAVARE
MANAGING DIRECTOR

National Federation of Cooperative Sugar Factories Ltd.,
Ansal Plaza, Block-C, 2nd Floor,
August Kranti Marg, New Delhi - 110 049

Phone: 9205377554 Email : nfcsfnd@gmail.com ; Website : coopsugar.org