# USDA Attachés' Global Agricultural Information Network (GAIN) Reports 2025

*Government Intervention in Sugar Markets*

*ASA has summarized various Sugar Annual Reports from the Global Agricultural Information Network (GAIN) from the U.S. Department of Agriculture (USDA) regarding certain interventions in sugar markets by country. USDA does not include all distortionary supports or quantification of the levels of those supports, so these summaries should not be considered all-inclusive. See for example, the WTO notification from Australia/India on India's sugar industry. Also, various labor and environmental regulations (or lack thereof), or other policies such as favorable financing for sugar infrastructure in these countries may not be detailed in the GAIN reports. For more information on those, please refer to ASA's website where various country studies have been completed.*

## Argentina (05/07/2025)

***Ethanol blend requirement***

"Ethanol production from sugarcane is forecast at 600–620 million liters in MY 2025/26, up from historical levels of approximately 200 million liters prior to the implementation of Argentina's biofuels mandate in 2010. Current law requires a 12 percent ethanol blend in gasoline."

## Brazil (04/22/2025)

***Ethanol Blend Requirements***

"Mills continue to prioritize sugar production due to favorable international prices. However, ethanol prices have been surging following the recent mandatory blend ratio increase. On August 1, 2025, the required ethanol blend in gasoline rose from 27 to 30 percent, which is expected to require approximately 1.4 billion liters of ethanol in MY2025/26."

## China (04/21/2025)

***State-owned enterprises; Government Protections; Input subsidies; Import tariff; Import licensing; Alternative sweetener restrictions***

"The central government continues to prioritize stable production levels, and local governments in Guangxi and Yunnan support this goal through subsidies and programs that promote improved planting techniques and mechanization."

"In Guangxi, cane farmers continue to receive government subsidies and financial support from millers to expand cane acreage."

"China applies a tariff-rate quota (TRQ) on imported sugar. The within-quota tariff rate is 15 percent with a limit of 1.945 million metric tons. Approximately 70 percent of the quota is allocated to state-owned enterprises (SOEs). The out-of-quota tariff rate is 50 percent. Since July 2020, all out-of-quota sugar imports are subject to an automatic import licensing system which the government also uses to monitor imports of other bulk commodities (i.e., palm oil, soybeans, and meat). This system requires importers to apply and receive advance approval prior to import. The timeline for granting licenses can be inconsistent."

"China's government restricts the development of the saccharine industry to protect the domestic sugar market and to "address environmental, food safety and consumer health concerns". Only three plants are licensed for saccharine production in China. These plants are monitored and inspected by the China Sugar Association (CSA) to ensure compliance with guidelines and limits on production, domestic sales, and exports."

## Colombia (04/17/2025)

***Ethanol blend requirements; Price stabilization; Price band system; Import tariffs***

"Colombia's sugar industry in the outyear is projected to divert significant volumes of sugarcane for alcohol production, while attempting to keep pace with both refined sugar manufacturing and export demand. With insufficient ethanol production to meet the government's ten percent ethanol blending mandate (E10), Colombia will continue its heavy reliance on imported ethanol"

"Since January 2001, local sugar prices have been subject to the Sugar Price Stabilization Fund (FEPA) (See Policy section). The Colombian government designed FEPA as a tool to protect local producers from fluctuations in international sugar prices."

"Sugar imports from CAN countries (i.e., Peru, Ecuador, and Bolivia) are allowed duty-free entry into Colombia. Similarly, Colombian sugar exports to these countries have zero percent duties, while imports from outside the CAN are subject to a variable duty. The basic customs duty rate on imports of both raw and refined sugar from non-CAN countries is currently 15 percent. The CAN revises the price band, both ceiling and floor, in April of every year.

## Dominican Republic (04/14/2025)

***Price controls; VAT; Tariffs; Government set sugarcane price; Ethanol blend requirements; Import taxes for ethanol***

"Currently, in-quota import duties for raw and refined sugar stand at 14 percent and 20 percent, respectively, plus an 18 percent value-added tax (VAT). In line with its World Trade Organization (WTO) commitments, the DR established a tariff-rate quota (TRQ) of 30,000 MT for sugar, which is subject to the in-quota rates, coupled with an out-of-quota tariff of 85 percent. To address production shortfalls, the DR, through INAZUCAR, authorizes imports above the TRQ, which are subject to the out-of-quota tariff rate."

"Several laws regulate the sugar sector in the Dominican Republic. Law No. 491 governs the relationship between private cane producers and millers; the law also sets prices for raw cane based on sugar content. Similarly, Law No. 619 assigns regulatory duties to INAZUCAR, which are overseeing both domestic and foreign marketing, TRQ allocations, price schedules, and statistical reporting."

For several years, the government has promoted the use or development of an ethanol-gasoline blend, initially established by Decree No. 556-05 in 2005. The provisions of the decree were formalized by Law No. 57-07 (passed in May 2007), which aimed to incentivize the development of renewable energy sources. This initiative aimed to establish a mandate that would include a 10-percent requirement on ethanol in gasoline blends, and a 20- percent biodiesel requirements for diesel blends; the executive branch has yet to enact his initiative."

It is noteworthy to mention that imported ethanol faces taxation similar to alcohol for human consumption, including the 18 percent VAT plus and an ad valorem tax based on the percentage of alcohol and weight. This tax framework effectively discourages the importation of ethanol for the local market."

"The Ministry of Industry, Commerce, Trade and Small and Medium Enterprises (MICM) in collaboration with INAZUCAR established the floor price for both raw and refined sugar based on historical prices and production estimates."

### Ecuador (04/15/2025)

***Government owned enterprises; Government set sugarcane price; Import tariff; Price band system; Ethanol blend requirement***

"Ethanol production is not expected to increase in the near to mid-term, industry is not able to cover the Ethanol demand to comply with the blend rate of 10 percent needed for ECOPAIS gasoline, opening the demand for imported ethanol."

"The ethanol production sector continues to rely on a contract with PETROAMAZONAS, the state-owned oil company, to supply up to 100 million liters of ethanol annually."

"In June 2022, the Ministry of Agriculture issued Agreement No. 0447, which established the price of cut sugar cane for MY 2022/23 at $35.05 per metric ton. This price has remained in effect for CY 2024 as well."

"Domestic sugar prices remain artificially high due to the government's protection of the sugar value-added chain from international trade. A significant example of government intervention favoring Ecuador's sugar producers is COMEX Resolution 030-2017, enacted in December 2017. This resolution effectively terminated the preferential treatment (zero tariffs) previously granted to sugar imports from Andean Community members Colombia, Peru, and Bolivia."

"All-origin raw and refined sugar imports are assessed a 15 percent base tariff. Additionally, sugar imports are assessed a variable tariff under the Andean Price Band System."

### Egypt (05/16/2025)

***Export Ban; Stock Management; Price Minimum;***

"In April 2025, the GoE decided to extend the ban on the export of sugar of all kinds for six months to secure the needs of the local market, as published in the Egyptian Gazette (issue 88), under the Ministry of Investment and Foreign Trade's Decision No. 111 of 2025, continuing Ministerial Resolution No. 88 of 2023.3 Industry leaders have commented that the decision to extend the sugar ban is a precautionary measure aimed at preserving stocks and maintaining current prices."

"The GoE is eager to maintain more than six months of reserves of essential commodities to support food security programs."

"The GoE increased the guaranteed prices for sugar beets by 16 percent, reaching EGP 2,400 ($47.30) per metric ton compared to the previous season"

## El Salvador (04/14/2025)

***Import tariffs; Safety seal requirement; Vitamin A enrichment requirement***

"The GOES imposes a 40 percent ad-valorem import tariff on all sugar. The bound rate is 70 percent as the GOES considers sugar politically sensitive because it is an important driver of rural income and employment...However, due to inflationary pressures, GOES has temporarily extended a zero percent import duty on sugar for another year, effective March 2024."

"The national sugar law states that all sugar sold locally must carry a safety seal provided by CONSAA. "

"GOES continues to mandate that all sugar sold domestically be fortified with vitamin A, with the costs shared between producers and millers. Although GOES does not have a specific support or assistance program for the sugar sector, it primarily provides support by limiting market access through import tariff protection.

The sugar industry is regulated under the national sugar law, with CONSAA serving as the oversight body. The CONSAA board of directors includes representatives from the government, sugar producers, and sugar mills."

## Eswatini (04/22/2025)

***Domestic discount incentive***

"The (ESA) is responsible for marketing of all sugar produced in Eswatini (both raw and refined). The revenue obtained through the sale of sugar and molasses is shared between growers and millers based on an agreed process and formula guided by the Sugar Act of 1967 and the Eswatini Sugar Agreement. The ESA provides a rebate (discount) to value-adding industries located within Eswatini to encourage and support domestic sugar sales."

## EU (04/18/2025)

***Storage aid***

"EU Delegated Regulation 2016/1238 lays down common eligibility rules for private storage aid for certain agricultural products including sugar. Only white sugar in crystal form in bulk or in big bags of 800 kg or more showing the net weight and with a moisture content not exceeding 0.06 percent is eligible."

## United Kingdom (contained within the EU Report)

***Import tariffs***

"The UK government published its post-Brexit tariff schedule that applies as of January 1, 2021. The Most Favoured Nation (MFN) tariff for refined sugar is £350/MT (€419/MT, $449MT), while the MFN tariff for raw sugar for refining carries a £280/MT (€339/MT, $364/MT) duty."

## Guatemala (04/15/2025)

***Ethanal Blend Requirement; Enrichment requirement***

"Guatemala continues to prioritize its domestic sugar supply through laws and regulations requiring the fortification of sugar with vitamins (mainly Vitamin A) and minerals (mainly iron). As part of this policy, the sugar industry is tasked with fulfilling local market demands first, followed by export markets. To sustain the industry's presence in the country, the sector has adopted a new 2023-2033 strategy focused on achieving economic equilibrium through investments in sustainability, encompassing environmental, social, and ethical commitments."

"A potential expansion in cultivated area is under consideration for MY 2026/27, contingent on the delayed implementation of the 10 percent ethanol-gasoline blend law, now scheduled to begin in calendar year (CY) 2026."

## Honduras (04/03/2025)

***Domestic price control; Import tariff; Vitamin A enrichment requirement***

"Any increase in sugar prices in the domestic market must be authorized by the Government of Honduras, and so far, no such increase has been granted."

"The import tariff for raw sugar and plantation white (standard) is set at 40 percent, with no additional consumption tax. For refined sugar, the import tariff is 15 percent, along with a 15 percent consumption tax. By law, all sugar intended for human consumption must be fortified with vitamin A, a requirement fulfilled by the Honduran sugar industry."

## India (05/05/2025, 9/29/2025)

***Price minimums; State-advised price supports; Price Support Payments; High Tariffs; Export restrictions; Ethanol mandate; Export quota***

"The Indian government has yet to increase the Fair and Remunerative Prices (FRP) for sugarcane for the upcoming year. As it stands, the FRP for MY 2024/25 is set at $4.09 per quintal (INR 340 per quintal), based on a recovery rate of 10.25 percent. This rate was updated in February 2024, offering farmers a return that is 107 percent above production costs, the highest recorded to date. Furthermore, for every 0.1 percent variation in recovery above or below 10.25 percent, farmers will either gain or lose $3.32 per quintal. Most states adhere to the FRP model, with the exceptions of Uttar Pradesh, Karnataka, Uttarakhand, Haryana, and Punjab."

"Uttar Pradesh, Karnataka, Uttarakhand, Haryana, and Punjab implement a State Advised Price (SAP) system for sugarcane. Unlike FRP, SAP is not tied to the sugar recovery rate and is typically set above the FRP."

"In addition to the FRP, the Indian government establishes a Minimum Support Price (MSP) for sugarcane. For the current year, the MSP is set at $41 per metric ton (INR 3,500 per metric ton) to assist in covering the cultivation costs of sugarcane. Similarly, India also sets an MSP for sugar; however, this price has remained unchanged since 2019, standing at $364 per metric ton (INR 31,000 per metric ton), despite several adjustments in the FRP and sugarcane's MSP."

"The Indian government has imposed a 100 percent import duty on the import of raw sugar. Most sugar imports fall under the Advance Authorization Scheme (AAS), with a smaller segment attributed to commercial sales. The AAS mandates that raw sugar imports be refined at Indian port-based sugar refineries before being re-exported."

"Ongoing restrictions on sugar exports are likely to contribute to higher ending stocks."

"In May 2022, the Indian government expedited the national E-20 mandate, moving the target date from 2030 to 2025, with the goal of increasing ethanol production capacity in India from 7 billion liters (BL) in 2021 to 15 BL in 2025. This March, the government announced that it had achieved the E-20 target ahead of the November 2025 deadline. The government also noted plans to consider a new target above E-20.5"

"Farmers in these regions capitalized on improved conditions, expanding their planting efforts and benefiting from government price support for sugar and molasses for ethanol production."

"Additionally, the projected recovery rate of 9.5 percent is expected to enhance sugar production compared to the previous year, further increasing the export quota and supporting India's position in the global sugar market."

## Indonesia (04/18/2025)

***Import controls; State-owned enterprises; Government-issue import license requirement; Reference price; Government reserves***

"Due to the expected higher production of domestic plantation white sugar, the Government of Indonesia (GOI) issued no import allocations for plantation white sugar for 2025/26 and slightly reduced the raw sugar import allocation for refineries."

"As one of the so-called *"Sembako"* or essential food products along with rice, corn, soybeans, cooking oil, beef, poultry meat, shallots, and eggs per Ministry of Trade (MOT) Regulation No. 27/2017, sugar is strictly regulated."

"They may only import raw materials when domestic supplies are not sufficiently available in terms of volume or quality or if the raw material is not produced domestically…the GOI tightly controls the timing, import volume, and distribution of import quotas."

"Refined sugar produced from imported raw sugar is prohibited from being distributed to retail markets for direct human consumption."

"BPS reported that smallholder farmers accounted for approximately 63 percent of the total sugarcane area, while the rest is managed by state-owned enterprises (10 percent) and private companies (27 percent)."

"Indonesia's state-owned sugar mills are aging, with approximately 37 out of 43 being over 100 years old. State-owned sugar mills' contribution to total production is on the decline as private companies with more efficient machinery and technology produce more. Nonetheless, with new sugar mills coming online, state-owned companies' ownership of sugarcane plantations is increasing."

"Whenever farm gate prices fall below the reference purchasing price, the Head of NFA may assign Indonesia's national logistics agency BULOG or other state-owned companies to procure sugar from farmers at the reference price. When sugar retail prices increase above the reference prices, the Head of NFA may also assign BULOG or state-owned enterprises to conduct market operations by selling sugar from the GOI's reserves in collaboration with wholesalers at the reference price level to dampen prices."

## Jamaica (04/17/2025)

***Transportation subsidies; Direct government oversight; Government-regulated market; Price control***

"To support the industry, the Government of Jamaica (GoJ) continues to provide transportation subsidies, particularly to small sugarcane farmers, to offset costs associated with transporting sugarcane to factories."

"The Ministry of Agriculture, Fisheries and Mining (MOAFM) oversees Jamaica's sugar industry, governing policies related to land usage, irrigation, subsidies, and other matters. Under MOAFM, the Sugar Industry Authority (SIA) is the regulatory body that exercises oversight in areas of arbitration, research and development and monitoring and evaluation. The SIA also regulates the marketing of sugar and molasses."

"GoJ rendered Jamaica Cane Products Sales Limited obsolete, … as the SIA began directly issuing licenses to sugar factories."

"The pricing of sugar within Jamaica is set by marketing agents and verified by the SIA."

## Kenya (04/18/2025)

***Government Ownership; Import tariff; Price control; Government regulation; Government R&D***

"Kenya's cane marketing is currently undertaken through 17 operational mills, four of which are government owned, with total installed capacity of about 1.7 million ton."

"According to industry sources, MY2025/2026 will likely mirror the MY2023/24 production situation that led to a temporary restriction of cane harvesting by Kenya's Agriculture and Food Authority (AFA), the government agency that was then responsible for the regulation of the sugar sector."

"Sugar imports from non-COMESA and EAC countries face a 100 percent tariff, unless a specific waiver is granted by the government of Kenya."

"The purchase price for sugar cane is set each season by an industry committee comprised of representatives from the government, sugar growers, and millers."

"The law provides for the development, regulation, and promotion of the sugar industry. It also establishes the Kenya Sugar Board (KSB), and the Kenya Sugar Research and Training Institute (KSRTI). The Kenya Sugar Board will regulate and manage the sugar industry. Previously, the Agriculture and Food Authority handled these functions. The Kenya Sugar Research and Training Institute will assume the sugar research functions that were previously under the Kenya Agricultural and Livestock Research Organization.

Other changes that come with the new law include a four percent sugar development levy on both imports and locally produced sugar. The levy is for financing the operations of KSB, KSRTI, and industry associations, and the maintenance of transport infrastructure in sugar growing regions."

## Mexico (04/18/2025)

***Direct government support [payments]; Government funded training; Price control***

"Under the Secretariat of Agriculture and Rural Development (SADER) "Production for Wellbeing Program," the GOM provides an annual support of $7,300 pesos (around USD $400) per sugar producer (up to 20 hectares rainfed or up to 5 hectares irrigated) to improve crop yields and contribute to food self-sufficiency. Furthermore, SADER provides training and technical support aimed at increasing yields."

"The Law on Sustainable Development of Sugar Cane establishes CONADESUCA as the agency responsible for coordinating and executing all activities related to the sugarcane agroindustry. "

"On a yearly basis, generally in late October, CONADESUCA announces the sugar reference price at which mills purchase sugar cane from growers for that harvest season... The reference price is negotiated annually – with the participation of government, millers, and growers – based on production, export volumes, and domestic and international prices."

## Nicaragua (04/21/2025)

***Vitamin A enrichment requirements; Import tariffs***

"All sugar in Nicaragua is enriched with vitamin A to combat nutrient deficiency."

"However, the sugar industry does benefit from relatively high domestic prices compared to world sugar prices as a result of high tariffs on imported sugar."

## Nigeria (04/18/2025)

***Import restrictions; Import taxes; Government-driven production expansion [providing land & onboarding]***

"The government restricts sugar imports by requiring the President to approve all imports based on the Minister of Industry, Trade, and Investment's recommendations."

"The second phase of the NSMP aims to produce around 1.7 to 1.8 MMT of sugar a year, providing 300,000 ha of irrigated land in nine states, and onboarding new sugar mills and refineries."

"According to the NSMP, the government distributes annual raw sugar import permits based on company implementation of their backward integration plan. The three major sugar refineries are BUA, Dangote, and Golden Sugar."

"Raw sugar imports face a 5 percent duty, plus an additional 5 percent levy to the Sugar Council, 1 percent charge on freight on board, and 7.5 percent value added tax (VAT) for those refineries that participate in its backward integration program. Importing refined sugar in retail packs is prohibited. Imports of refined sugar not in retail packs are taxed at a 20 percent duty, 50 percent development levy, plus an additional 7.5 percent VAT."

## Pakistan (04/15/2025)

***State/provincial price support; Government-set minimum support price; Government-controlled marketing; Export limitations***

"Only the Sindh provincial government set a minimum sugarcane price of 425 rupees per 40 kg (approximately $38 per ton)."

"Sugar is considered an essential commodity in Pakistan, with provincial governments overseeing its pricing and supply to ensure stability and affordability. Provincial authorities also restrict sugar mills to sourcing sugarcane from designated areas and control procurement quantities. This extensive control at the provincial level aims to maintain a steady production flow and protect local farmers."

"To ensure domestic price stability, the government will continue to control exports."

"The government set a notional price ceiling, but prices remained above that price as of mid-April."

## Peru (04/15/2025)

***Government-ownership; Price band system***

"The Government of Peru still owns shares in two sugar mills, Pomalca and Tuman. These mills have not found investment partners to finance improvements in efficiency."

"Sugar is part of the Peruvian Price Band System (PPBS), which has a current floor price of $518 and a ceiling price of $644."

## Philippines (04/16/2025)

***Import approval; Government production & marketing control; Export oversight; Tariffs***

"On January 2, 2025, SRA (Sugar Regulatory Administration) issued Sugar Order No. 6 (SO6) imposing clearance fees of PhP3/LKG on ($0.05/LKG) on imported sugar and alternatives. SO6 covers the importation in whatever form and sugar content of all "sugars" covered under Heading 17.01 and 17.02 and "sugar confectionery" under Heading 17.04 of the ASEAN Harmonized Tariff Nomenclature (AHTN)."

"Post maintains MY 2026 exports at zero while waiting for SRA's policy on sugar export next MY."

"With the on-going harvest, there will be a build-up of raw sugar if it is not sold in the market. SRA monitors warehouses owned by millers, traders, and importers, who are required to register all warehouses."

"For non-ASEAN countries, under the Uruguay Round of the WTO, the Philippines committed to a final ten-year minimum access volume (MAV) of 65,050 MT of raw sugar, with a tariff rate of 50 percent. All importation in excess of the MAV is subject to a tariff rate of 65 percent."

"SRA has the mandate under EO 18 Series of 1986 and Republic Act No. 10659 or the Sugar Industry Development Act (SIDA) of 2015 to establish a balance between domestic production and the country's sugar requirement."

"During the start of each crop year, the SRA issues a central policy (known as Sugar Order No.1) on production and marketing of sugar for the country, which allocates how much production goes to the domestic and export markets, as well as reserves. These orders are adjusted as the season progresses."

## South Africa (04/21/2025, 09/30/2025)

***Government price control; Export control and requirements; Import tariff & minimum price control; Sale rebates and promotion of domestic sugar; Local procurement commitments; Price restraints***

"Even though a new tariff of R2,349 ($129.15)/MT was applied on August 8, 2024, as the world sugar price continued to recede there were also periods which would have triggered even higher import tariffs, however, adjustments were not implemented."

"South Africa imposes a tariff on imports to protect the domestic sugar industry against low world sugar prices using a variable tariff formula to determine an applied tariff. The current Dollar Based Reference Price (DBRP) is $680 per MT, increased from $566 per MT since July 2018. Tariff protection is granted when the world sugar price remains below the DBRP of $680 per MT."

"The South African Sugar Association (SASA) is by law the only organization permitted to export raw sugar produced in South Africa. Sugar milling companies are only permitted to export refined sugar. South Africa always exports surplus raw sugar, regardless of the global prices and sometimes at a loss, because domestic sugar regulations stipulate that the price paid to sugar cane growers should be based on revenue obtained from the sugar sales in the local and export markets for that specific season. The South African sugar industry provides a rebate to domestic manufactures to promote the sale and use of locally produced sugar."

"SASA sets the sugar notional price and manages the division of industry proceeds from the sale of sugar and molasses."

"South Africa applies the dollar-based reference price (DBRP) mechanism to ensure that, inclusive of the duty, the DBRP (currently $680 per ton) is the lowest price that an importer will pay for imported sugar."

"The master plan follows a phased approach to planning and implementation. For the three-year Phase 1 stage, which ended in March 2023, the aim was to increase domestic use of sugar to at least 300,000 MT by having local manufacturers prioritize South African sugar instead of imports to make their products."

"MY 2025/26 domestic sugar consumption is revised upward due to increased production, imports, stable sugar prices, and new regulations supporting the implementation of Phase 2 of the Sugar Master Plan, which includes price restraints and local procurement commitments."

## Thailand (6/16/2025)

***Price controls***

"On January 13, 2025, the cabinet approved the minimum prices of sugarcane, which were set at 1,160 baht/MT ($34.21)."

## Turkey (04/22/2025, 9/30/2025)

***Government ownership; Price control; Production quota system; Import tariff; Government alternative sweetener market regulations***

"The state run sugar company Turkseker, on behalf of the government of Turkiye (GoT), typically announces the annual purchase price for sugar ahead of planting in April to incentivize production and serve as a market reference for other private sugar companies."

"The government's production quota for sugar beets during this period is slightly less than 3.0 MMT. The amount produced over the quota, which is approximately 100,000 MT, will go for export or to be used in food or beverage products for export, in accordance with the rules of the quota system."

"In recent years, however, many sugar factories were privatized, except for the state-run Turkseker, which is now the largest sugar company in the country."

"Given the prohibitively high tariff of 135 percent on imported sugar, nearly all sugar imports are thought to be coming in under the IPR, which allows duty-free imports as long as the product is used in a food or beverage product for export. Because of this high tariff, only specialty sugar that is not domestically produced (e.g., medical, laboratory use) is imported outside these duty-free channels."

"The government's sugar production quota system discourages companies from holding excess stocks."

"Turkey exports starch-based sugar (SBS) made from corn. In recent years, SBS exports have increased as the government has gradually reduced the amount companies can sell on the domestic market."

"The sugar sector is heavily regulated. The government, under presidential decree, sets production quotas and fixes certain prices. The Sugar Department under the Ministry of Agriculture and Forestry (MinAF) regulates and monitors the market."

"Turkiye has exported limited volumes of sugar because Turkish sugar is not competitively priced vis-à-vis other international suppliers."

## Ukraine (5/22/2025)

**Tariffs; Export Quotas**

"Ukraine maintains a 50 percent import duty for all imported sugar, both raw and processed (HS Code 1701 and all its subcodes)."

"The Ministry of Economy maintains (in Ukrainian) an export quota for sugar at 107,238 MT to the EU for CY2025."

## Venezuela (04/18/2025)

***Government ownership; Tariffs; Import controls; Import licenses***

"There are presently 10 Venezuelan state-owned sugar mills."

"For MY 2025/2026, FAS estimates sugar mill inventories to be 70 percent higher due to Maduro authority mandates for sugar inventories to supply the CLAP program and the expectation that all refined sugar will be sourced locally instead via imports."

"Since December 2020, refined sugar has maintained an 8 percent basic customs duty with a VAT of 16 percent. The Maduro authority sporadically grants import licenses and exempts VAT and import duties depending on economic conditions."

### Zimbabwe (04/18/2025)

***Vitamin A enrichment requirements; Disadvantages export sales; Import tariffs; Price control; Ethanol blend requirement; Direct government funding, investment, and support***

"Additionally, sugar produced in Zimbabwe must comply with labelling and Vitamin A fortification regulations, while some imported sugar did not comply with those requirements, further undermining price levels of domestic production."

"The government of Zimbabwe requires exporters to convert 25 percent of export receipts into the local currency, which discourages exports, as revenue from foreign sales lose some of their value due to the conversion requirement while the local currency continues to lose value against the U.S. dollar."

"FAS/Pretoria revises MY 2024/25 sugar exports 6,000 MT down from previous estimates back to normal export averages after Zimbabwe reinstated its import duty, leading to more sales on the local market."

"Star Africa Corporation, an independent refinery, supplies the majority (at least 80 percent) of refined sugar in Zimbabwe. To maintain low retail prices for sugar in Zimbabwe, the government negotiates a fair price at which Star Africa buys raw sugar from the sugar mills. As a result, Star Africa is also required to obtain permission from the government to increase the wholesale and retail prices of refined sugar sold in Zimbabwe."

"Zimbabwe introduced mandatory blending of fuel with ethanol in 2011. Currently, minimum mandatory blending of vehicle fuels with ethanol is 20 percent, but the level varies depending on the domestic supply and availability of ethanol."

"Project Kilimanjaro is an initiative by the Zimbabwean government, Tongaat Hulett, and private banks to assist up to 1,070 private farmers supplying cane to mills to increase productivity on their 22,822 ha by increasing yields to at least 100 MT/ha by MY 2023/24. The project plans to develop 4,000 ha of virgin land into new sugar cane fields to benefit 200 new farmers on a full cost recovery basis, creating 2,000 new jobs. About $17.1 million has been spent to date with 2,700 ha of virgin land cleared, storage dams and water canals built, water pumps installed, and 455 ha planted to cane."