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ANNUAL REPORT
2004

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PAKISTAN SUGAR MILLS ASSOCIATION
ISLAMABAD

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Annual Report 2005

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2004

PAKISTAN SUGAR MILLS ASSOCIATION
ISLAMABAD

MANAGEMENT OF
PAKISTAN SUGAR MILLS ASSOCIATION
FOR 2004-2006

CENTRAL EXECUTIVE COMMITTEE

1.	Ch. M Zaka Ashraf	Chairman
2.	Mian Shahid Shafi	Vice Chairman
3.	Mr. Abdul Wajid	Vice Chairman
4.	Mr. Iskander M Khan	Vice Chairman
5.	Mr. Abdul Qadir Khattak	Member
6.	Mr. Imran A Habib	Member
7.	Ch. Yasir Javed	Member

SECRETARIAT

MR. K. ALI QAZILBASH
SECRETARY GENERAL

RASHID PLAZA, JINNAH AVENUE
ISLAMABAD
PHONES: 051- 2270525 & 2823971
FAX: 051- 2274153
E-mail: psma_Centre@hotmail.com

ZONAL COMMITTEES
2004-2006

ZONAL COMMITTEE PUNJAB

1.	Mian Shahid Shafi	Chairman
2.	Mian Waqas Riaz	Member
3.	Ch. Muhammad Waheed	Member
1.	Mr. Anwar Wahla	Co-opted member
2.	Ch. Bashir Ahmed	Co-opted member

Zonal Secretariat

Col. (Retd.) Maqsood Cheema	Secretary
Unit No. 1, Happy Homes	Tel: 042-5710190
38-A, Main Gulberg, Lahore	Fax: 042-5752940

ZONAL COMMITTEE SINDH

1.	Mr. Abdul Wajid	Chairman
2.	Mr. Omer H Said	Member
3.	Mr. Mustafa Majid	Member

Zonal Secretariat

Mr. Umer Latif	Secretary
1st, Floor, Modern Motors House	Tel: 021-5686526
Beaumont Road, Karachi	Fax: 021-5680344

ZONAL COMMITTEE N.W.F.P

1.	Mr. Iskander M Khan	Chairman
2.	Abdul Qadir Khattak	Member
3.	Mr. Muhammad Tahir Iqbal	Member

Zonal Secretariat

Premier Sugar Mills &	Tel: 0931-62051-52
Distillery Co. Ltd, Mardan	Fax: 0931-62989

Annual Review
39th Annual General Meeting
07th October' 2004

Distinguished Members,

I am pleased to present the Annual Report of the Pakistan Sugar Mills Association for the year ending 30th September'2004. This Annual General Meeting is being held at the conclusion of the two years term of the Chairman and the Central Executive Committee elected for the session 2002-04. The Association holds elections regularly for the Centre and the Zonal management, which is recently completed for the term 2004-06. The names of the newly elected Management for the term 2004-06 will be announced at the end of this meeting.

I, now present you with the annual review and the general outlook of the industry.

2003-04: The year under review.

Nature has been very kind to Pakistan during the year, bestowed it with abundance availability of water at the right timings, with its major reservoirs at a satisfactory level even at the end of winter, ensuring a regular supply of water through our irrigation system. In addition, the periodic rains at desired timings had a favourable effect on the crops particularly the sugarcane, the most water-demanding crop.

As forecasted in our last year's report the sugarcane crop was extraordinary, and despite the minor reduction in the plantation area the cane crop was recorded at 53.8 million tonne. Sugarcane utilization by the mills was 81% as 43.6 million tonne of sugarcane was crushed and about 4.0 million tonne of sugar was produced with a record average recovery of 9.15 %, higher by 0.4 % compared to the recent past and second to 9.25 %, only once recorded in1991-92. This phenomenal performance is credited to Punjab that achieved 9.09 % recovery improving all their previous records. Similarly, in sugar production, Punjab has laid a new benchmark by producing 2.60 million tonne i.e. 65% of Pakistan's production, improving its own record by a quarter million tonne.

The production at this level confirm the following, claimed by the industry.

- Sugar producing capacity in Pakistan stands over 5.5 million tonne and 4.0 million tonne was produced easily in a comparatively shorter season.

- We had extra ordinary rains and irrigation water supply favouring abundance of sugarcane. Our estimates were very close and on conservative side speak its credibility as shown below.

	2001-2002		2002-2003		2003-2004	
Years	Estimated	Actual	Estimated	Actual	Estimated	Actual
Sugarcane Area HA.	1,032,000	999,700	1,100,000	1,099,700	1,086,000	1,074,700
Sugarcane produced	48,000,000	48,091,000	53,000,000	52,049,000	54,200,000	53,800,000
Yield / Ha-Tonnes	46.50	48.10	48.10	47.33	49.90	50.00
Cane Utilized by Mills	36,000,000	36,708,637	40,500,000	41,786,689	43,500,000	43,661,377
% age of utilization	75.00	76.33	76.40	80.28	80.26	81.15
Average Recovery %	8.40	8.71	8.70	8.74	8.74	9.15
Sugar Production (cane)	3,024,000	3,197,745	3,523,000	3,652,745	3,801,900	3,997,010

Despite the favourable conditions the year neither brought due economic benefits to the growers nor the millers. With the addition of carryover stock, the total availability rose to 4.76 millions tonnes, almost a million tonne over and above the domestic consumption.

Domestic sugar price was already on the downward slide in continuation of the past two years, whereby only half a million tonne surplus caused 20% crash in the domestic price. The negative prospect with over a million tonne surplus was clearly foreseen as predicted.

Before the delayed commencement of crushing season 2003-04, the ECC held on 12th Nov'2003 decided to purchase 200,000 tonnes of sugar through TCP in two tranche as a strategic stock, in exportable specification and packing, replaceable with fresh sugar at the beginning of the new crushing season.

Acknowledging a bigger harvest PSMA continued with a series of meetings with the concerned Ministries, and finally had to communicate the situation to the Hon. Prime Minister in mid Feb'04. Government by now had realized that the surplus was beyond the holding capacity of the mills and were convinced that the accumulation of loses is now causing concern to the growers as well. In the middle of March' 04 an inter-ministerial meeting was held and finally another summery recommendation was approved by the ECC in its meeting of 20th May'2004 to purchase another 300,000 tonnes sugar through TCP to enhance the strategic stock. The approval was conditional to the commitment provided by the PSMA that the outstanding payments to the growers would be cleared by 15th June 2004, and that the new crushing season to start by 1st November 2004. Though the financial approval and finalization of payments by TCP was delayed till 15th June, while the mills were struggling hard to clear grower's dues.

PSMA was put in a very difficult situation and had to offer the desired commitment after few days for the obvious reasons. Growers arrear has always been a matter of concern to the Government as well the industry. Government's pressure to start early crushing goes to favour few farmers is worth re-consideration. Production 2003-04 is credited to multiple positive growths in the sugarcane crop and delayed commencement of crushing season that resulted in recovery improvement by 0.41%, which enhanced the production; otherwise this would have been partially wasted.

Early start of the crushing is always forced at the cost of recovery loses to vacate a small portion of land for the late wheat sowing. This year again Sindh Government through a notification has directed the mills to start as early as 1st week of October based on the shortage of water supply and to add the land for the wheat sowing. The real impact of such forcible actions needs to be evaluated for a balanced decision.

As per decision of the Government, 465,095 tonnes was procured by the TCP through tenders exclusively from PSMA members and to be stocked at the mills godowns. Another 20,000 tonnes was lifted to complete the procurement made last year for 100,000 tonne export.

- During the inter-ministerial meetings further recommendations were made to establish the industry's viability by taking the following mid and long-term measures: -
  - Sugar Factories Control Act 1950
  - Sustained and functional sugar policy
  - Establishment of Export Development Fund
  - Linkage of sugarcane prices with present low sugar prices until a totally free market policy is adopted.
  - Encouragement and incentives for the industry's efficiency, expansion and diversification including production of electricity and ethanol etc.
  - Improvement in sugarcane quality.

These recommendations were well received and hopefully are being processed by the Ministry of Industries and Production.

- In December 2003 a senate committee was established to consider WTO challenges. PSMA lodged its complaint against the lavish multi-billion Euro subsidies that has distorted the international sugar prices. Later, a copy of the report prepared by the legal advisor of Punjab Zone was also forwarded to the committee.

- As a result of SAARC conferences (SAFTA) South Asian Free Trade Area, a regional trade agreement was established. PSMA appreciated the move and in response to the Ministry of Commerce call for items on sensitive list, PSMA responded with a request to include "Sugar" on the list of sensitive items.

At the end of July 04, based on the biased media reporting, the Government announced the sale of sugar from the TCP's reserve stock to control the so called rise in the sugar retail price, whereas, in reality, the retail market price during the months of June and July did not show any alarming fluctuation. Government must consider that the industry has been through a long period of crises, and minor fluctuation in the market prices does not require decisions having long-term adverse implications.

Recently the ECC in its decision of 21st September 04, directed TCP to release 200,000 tonnes of sugar from the buffer stock to stabilize sugar prices during the Holy month of Ramzan. While take up the decision PSMA was not consulted, and did not account for the stock availability with the mills and in the market. The retail market price of Rs. 20/62 per kg was recorded in August 04 that did not require the GOP to release the TCP's buffer stock. This move has depressed the ongoing sale from the mills, especially at the time when mills are making preparation to commence the upcoming crushing season.

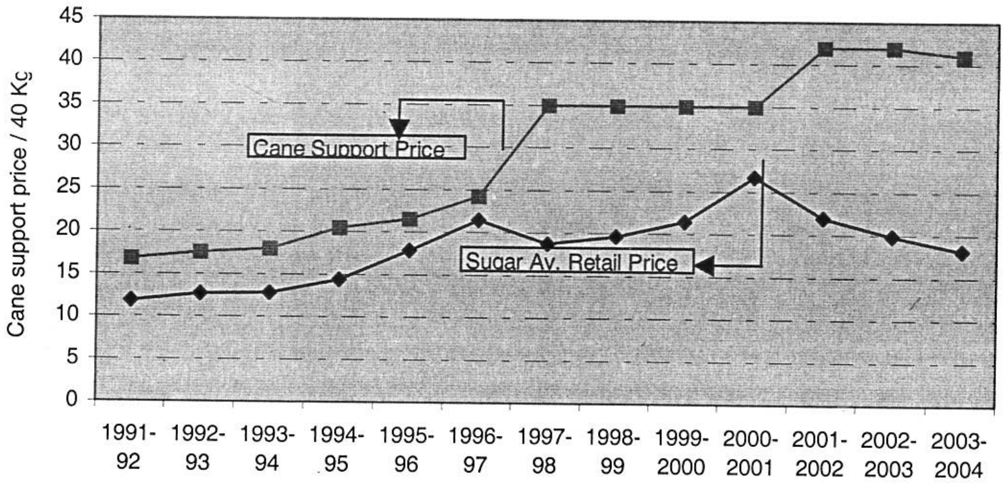
We do appreciate the Prime Minister Mr. Shaukat Aziz decision of 27th September 04 that the sale price for the first tranche of 50,000 tonnes TCP's stock would have a fixed price of Rs.19/- inclusive of Sales Tax, whereas, the ECC constituted committee remained indecisive on the sale price.

Outlook 2004-05

Preliminary report from MINFAL indicates that sugarcane for the year 2004-2005 is cultivated on 949,700 hectares, which is 11.63% lower compared to the last year's area under sugarcane plantation. In 1998-99, the sugarcane plantation area was 1,155,200 hectares at maximum. Apparently, the sugarcane production has decreased as the water supply has not been as good as that of last year, as the winter rains have been below average and monsoon's arrival was late. Last year, the yield had improved to over 50.0 tonnes per hectare, which is now estimated at 47.5 tonnes per hectare, that may yield 45.0 million tones of sugarcane and hence the short supply may trigger cane price war, against which members are advised to refrain. The sugar production may range around 3.1 million tonne at an optimum recovery rate of 8.75%, in case we manage to procure at-least 80% of the crop.

The carry over stock at the mills along with the TCP's owned stock would make availability to around 4.0 million tonne against estimated consumption of 3.6 million tonne. Hence enough stocks are ensured for the year 2004-05, and therefore any significant price hike is not foreseen.

The growers have not been very happy in the recent past, and have been protesting at every forum for the price increase. We do understand and can see now the impact of negative increment on the sugarcane prices when cost of inputs is on the rise. The industry could not afford any price increase due to the continued price crash and widening gap between the sugar and sugarcane prices as shown below.



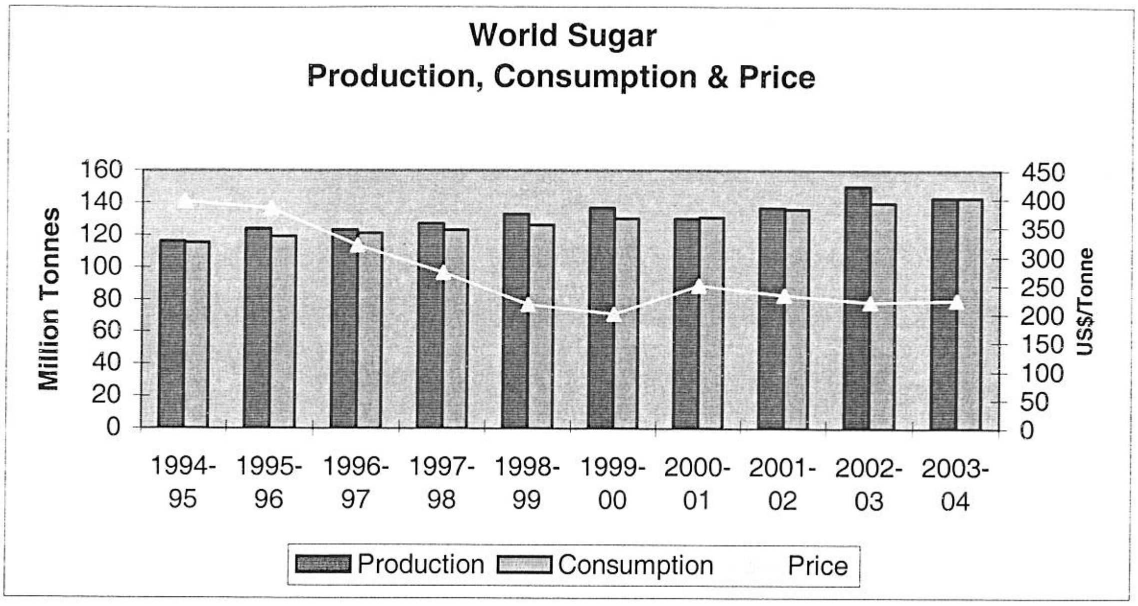
Our policy makers are advised to realize that the millers and the growers both need to have positive incentives, as very soon, the consumption in Pakistan will catch up with the production in the country. In the near future the period of distorted international prices will also be over in stages. Once the international sugar prices are free of subsidies and other barriers, the import business is going to be very costly and soon our economists will harp the viability of our sugar industry, who have been advising otherwise negatively

The present over sensitiveness on the slight increase in the sugar prices is harming the industry and the growers both and it is not doing any good to the priority stakeholder i.e. the consumer whose total sugar consumption expense in the house hold budget is maximum up to 2.0 % in the lower middle class, and is further reduced in the upper class.

Farmers and Millers of the developed countries already had the leading advantage of the subsidies for many years, while the developing countries curbed the subsidies with loyalty and inhibited the domestic industry to invest in research and development for achieving scientific growth by the growers. Immediate attention is desired for a countrywide campaign towards meaningful research and development on the cane varietal improvement and productivity of the mills to meet the future challenges.

International Scenario

Various international agencies have been giving different production and consumption estimates for the year 2003-04 ranging from 145.0 to 140.0 million tonne on production side and 145.0 to 139.0 million tonne on consumption, more or less a balance year. With the support of heavy carry over stocks, the prices remained fluctuating within a low range of anxiety. The nervousness of the world market at the year's end was obvious as it approaches the end of long series of surplus years and the deficit widely predicted for the coming crop cycle at the global level.



World production and consumption for the year 2004-05 has been generally forecasted as minor deficit by the most global agencies.

India faced a severe short fall but prices remained stable due to of huge carry over stock of 13.5 million tonnes. Drought conditions are improved due to recent rains and with the support of adequate carry over stock India may not be active in the international market.

China is impressively improving on the consumption side by control on saccharin by the food industry. To meet the demand Government is releasing sugar from the state reserves.

In Russia, imports are controlled by a combination of lower import duty in (May-July) fixed at US$ 206/- per tonne and US$ 235/- in April. The prevailing wholesale prices have recently reached US$ 560/- per tonne. For large size imports the country may reappear in the market.

Brazil's production is expected on further rise by 11% from the previous crop estimated at 27.0 million tonne. With strong oil and gasoline prices ethanol demand is on rise. The output in Brazil however can easily adjust minor world sugar deficit.

However, taking into account the gradual return to the normal stock position globally, the outlook seems positive. The tight production and supply worldwide indicates higher prices next year.

WTO is already examining the claim forwarded by Australia, Brazil and Thailand against the European Union that brought the international sugar market down by illegal subsidies. The distorted prices have adversely affected the developing countries like Pakistan who could not afford to export its surplus production. Due to the special and differential treatment the safeguard measures did not work in favour of the developing countries.

On 1st & 2nd August'2004 after a marathon negotiation in Geneva, the key WTO members agreed and struck a crucial deal to slash the multi-billion- dollar farm subsidies and open industrial market to boost global trade. The accord could lift poverty and trigger growth in many poor and developing countries. The decision includes sweeping changes to the long standing heavily subsidized production and marketing system, which distorted the global sugar prices.

The hard won deal was welcomed through out the world and we too see better prospects for the growers and for the industry when the accord is fully implemented. Pakistan has to be careful regarding other technical barriers and environmental restrictions for global competitiveness.

Conclusion

- 2003-04 has been overall high productivity year. Sugar mills inability to hold large size surplus stocks continued to keep the sugar market depressed.
- With inclusion of last season, Government of Pakistan procured a total of 564,000 tonnes, which included export of 100,000 tonnes through TCP. Further export of over 100,000 tonnes has taken place from mills through export process and local sale to Afghanistan.
- Recent Government decision to release 200,000 tonnes of TCP sugar stock and pressurizing the mills for the early start is seen as bad omen for the production year 2004-05 and future sugarcane price structure.
- Procurement of sugarcane was on higher side and therefore, production of Gur was on decrease.
- 3% additional Sales Tax payable by the mills was finally withdrawn in the budget 2004-05 by the Government of Pakistan.
- 2004-05 is seen as deficit year, but the reserve stocks held by TCP will keep the supply in balance, hence the domestic prices may show minor upward movement.
- Shortage of sugarcane may result in inter-mill price competition. Zonal committees are advised to resist undue increase in cane price.
- International scenario may soon bring hope to the developing nations as soon as the subsidized regime is slashed in stages.
- Overall PSMA has been successful in steering the sugar industry out of crises during the year.

In the end of the annual review I wish to register my thanks to all our Zonal Chairmen, members of our Central and Zonal Committees and specially to the Secretary General Mr. Qazilbash with whose co-operation and team work spirit we were able to convince Government of Pakistan to provide a short term relief. We hope to continue with the same co-operation as the new management takes charge.

07th Oct 2004

Thank you,

Iskander M. Khan
(Chairman)

APPENDIX TO 2004 ANNUAL REPORT
LIST OF ATTACHED STATISTICAL TABLES

TABLE 1
SUGARCANE CRUSHING, SUGAR PRODUCTION & RECOVERY % 1990-91 TO 2002-2003

PAKISTAN

YEAR	NO. OF MILLS	CANE CRUSHED TONNES	SUGAR MADE TONNES	RECOVERY %
1990-91	51	22,603,696	1,908,838	8.44
1991-92	53	24,795,815	2,296,698	9.25
1992-93	61	27,274,806	2,375,289	8.71
1993-94	63	34,181,899	2,900,523	8.49
1994-95	66	34,193,290	2,983,101	8.72
1995-96	66	28,151,434	2,449,598	8.70
1996-97	68	27,152,918	2,378,751	8.76
1997-98	71	41,062,268	3,548,953	8.64
1998-99	71	42,994,911	3,530,931	8.21
1999-00	69	28,982,711	2,414,746	8.33
2000-01	65	29,408,879	2,466,788	8.39
2001-02	69	36,708,638	3,197,745	8.71
2002-03	71	41,786,689	3,652,745	8.74
2003-04	71	43,661,377	3,997,010	9.15
2004-05	71	32,101,739	2,92~~2,846~~ 2,126	9.10

PUNJAB

YEAR	NO. OF MILLS	CANE CRUSHED TONNES	SUGAR MADE TONNES	RECOVERY %
1990-91	24	12,094,630	933,721	7.72
1991-92	25	11,745,224	1,012,297	8.62
1992-93	32	13,433,045	1,103,531	8.22
1993-94	34	20,066,265	1,634,154	8.14
1994-95	36	20,975,836	1,771,084	8.44
1995-96	37	16,992,633	1,375,789	8.10
1996-97	37	16,293,237	1,292,912	7.94
1997-98	39	25,905,541	2,065,886	7.97
1998-99	39	26,081,066	2,033,356	7.80
1999-00	37	16,829,610	1,315,637	7.82
2000-01	35	18,068,437	1,437,450	7.96
2001-02	37	25,252,609	2,152,175	8.52
2002-03	38	27,583,062	2,351,102	8.52
2003-04	38	28,604,925	2,599,490	9.09
2004-05	38	22,776,832	2,046,833 558	8.98 9

SINDH

YEAR	NO. OF MILLS	CANE CRUSHED TONNES	SUGAR MADE TONNES	RECOVERY %
1990-91	22	9,597,884	902,311	9.40
1991-92	22	11,956,718	1,187,576	9.93
1992-93	24	12,723,563	1,175,195	9.24
1993-94	24	13,031,888	1,172,507	9.00
1994-95	24	12,037,995	1,107,880	9.20
1995-96	24	10,341,372	1,008,127	9.75
1996-97	27	10,314,835	1,028,169	9.97
1997-98	27	13,853,107	1,374,477	9.92
1998-99	29	15,095,412	1,353,012	8.96
1999-00	25	10,856,757	996,317	9.18
2000-01	25	10,493,428	968,175	9.23
2001-02	27	10,162,607	940,959	9.26
2002-03	28	12,415,817	1,158,674	9.33
2003-04	28	12,990,824	1,221,268	9.40
2004-05	28	7,915,416	754,458	9.53.

N.W.F.P.

YEAR	NO. OF MILLS	CANE CRUSHED TONNES	SUGAR MADE TONNES	RECOVERY %
1990-91	05	911,182	72,806	7.99
1991-92	05	1,093,873	96,824	8.85
1992-93	05	1,118,197	96,562	8.64
1993-94	06	1,083,745	93,861	8.66
1994-95	06	1,179,458	104,136	8.83
1995-96	05	817,429	65,682	8.19
1996-97	04	744,845	57,669	7.74
1997-98	05	1,303,619	108,589	8.33
1998-99	05	1,818,433	144,563	7.95
1999-00	05	1,296,344	102,792	7.93
2000-01	05	847,015	61,163	7.22
2001-02	05	1,293,422	104,611	8.09
2002-03	05	1,787,810	144,917	8.11
2003-04	05	2,065,629	176,252	8.53
2004-05	05	1,409,491	121,034.	8.59.

TABLE 2
BEET SUGAR PRODUCTION, BEET SLICED, SUGAR MADE & RECOVERY BY NWFP SUGAR MILLS

YEAR	NO. OF MILLS	BEET SLICED TONNES	SUGAR MADE TONNES	REC. %	MOLASSES MADE TONNES
1990-91	03	282,103	23,312	8.26	8,636
1991-92	03	314,758	29,009	9.21	12,840
1992-93	03	214,950	18,916	8.80	8,649
1993-94	04	242,482	21,933	9.05	9,392
1994-95	04	193,595	18,371	9.49	7,412
1995-96	03	211,670	20,435	9.65	7,738
1996-97	03	166,875	14,610	8.76	6,115
1997-98	02	81,794	6,267	7.66	3,127
1998-99	03	126,123	10,831	8.59	5,069
1999-00	03	187,478	14,618	7.80	7,750
2000-01	03	226,252	17,276	7.64	8,684
2001-02	03	316,041	29,127	9.23	13,376
2002-03	03	222,063	22,066	9.94	8,490
2003-04	03	250,171	23,797	9.51	8,684
2004-05	02	120,903	11,373	9.41	4,287

TABLE 3
CONSOLIDATED SUGAR PRODUCTION IN PAKISTAN (IN TONNES)

YEAR	SUGARCANE	BEET	RAW	TOTAL
1990-91	1,908,838	23,312		1,932,150
1991-92	2,296,698	29,009		2,325,707
1992-93	2,375,289	18,916		2,394,205
1993-94	2,900,524	21,933		2,922,457
1994-95	2,983,104	18,370		3,001,472
1995-96	2,449,598	20,435		2,470,034
1996-97	2,378,751	14,610		2,393,361
1997-98	3,548,953	06,267		3,555,220
1998-99	3,530,931	10,831		3,541,763
1999-00	2,414,746	14,618		2,429,364
2000-01	2,466,788	17,276	531,930	3,015,994
2001-02	3,197,745	29,172	22,111	3,249,029
2002-03	3,652,748	22,066	1,945	3,676,759
2003-04	3,997,010	23,797		4,020,806
2004-05	2,922,~~846~~ 126	11,373	~~159,306~~ 182,302	~~3,092,525~~ 3,115,801

TABLE 4
MOLASSES PRODUCTION IN PAKISTAN FROM CANE, RAW & BEET (IN TONNES)

YEAR	PAKISTAN	PUNJAB	SINDH	NWFP
1990-91	1,119,978	611,033	473,432	35,513
1991-92	1,168,158	545,125	581,683	41,350
1992-93	1,330,419	632,055	652,789	45,575
1993-94	1,694,852	972,827	676,790	45,235
1994-95	1,650,952	1,010,890	592,067	47,994
1995-96	1,361,471	821,298	503,692	36,481
1996-97	1,319,860	798,448	482,636	32,661
1997-98	1,978,801	1,237,940	684,823	56,038
1998-99	2,113,595	1,276,391	760,533	76,670
1999-00	1,397,378	800,536	534,003	62,838
2000-01	1,501,501	901,732	550,605	40,480
2001-02	1,822,959	1,224,905	522,939	75,115
2002-03	2,048,117	1,304,284	656,520	87,313
2003-04	2,122,099	1,351,728	667,160	103,211
2004-05	~~1,496,163~~ 1,497,395	~~1,038,705~~ 1,039,937	393,287	64,171

TABLE 5 (1)
SUGARCANE SUPPORT PRICES MILL-GATE DELIVERY

YEAR	PUNJAB	SINDH	N.W.F.P	QUALITY PREMIUM
1990-91	15.25	15.75	15.25	0.19
1991-92	16.75	17.00	16.75	0.22
1992-93	17.50	17.75	17.50	0.22
1993-94	18.00	18.25	18.00	0.22
1994-95	20.50	20.75	20.50	0.27
1995-96	21.50	21.75	21.50	0.27
1996-97	24.25	24.50	24.25	0.27
1997-98	35.00	36.00	35.00	0.32
1998-99	35.00	36.00	35.00	0.50
1999-00	35.00	36.00	35.00	0.50
2000-01	35.00	36.00	35.00	0.50
2001-02	42.00	43.00	42.00	0.50 (Indicative price)
2002-03	40.00	43.00	40.00	0.50
2003-04	40.00	41.00	40.00	0.50
2004-05	40.00	43.00.	40.00.	0.50

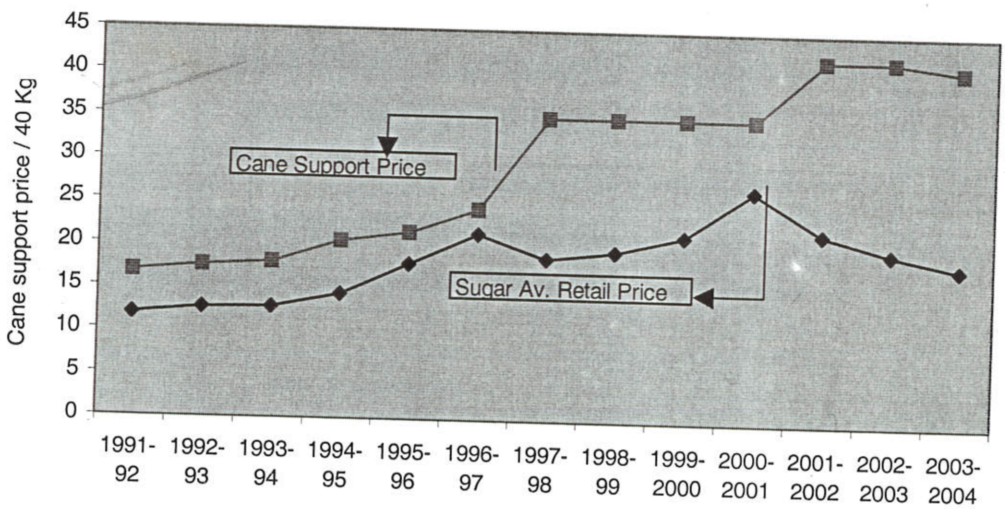
Prices are per 40 kg of sugarcane.

TABLE 5(2)
SUGARCANE SUPPORT PRICES IN COMPARISON WITH SEASON'S AVERAGE RETAIL PRICES

YEAR	PUNJAB	SINDH	NWFP	AV. SUGAR PRICE/KG
1990-91	15.25	15.75	15.25	11.04
1991-92	16.75	17.00	16.75	11.85
1992-93	17.50	17.75	17.50	12.62
1993-94	18.00	18.25	18.00	12.80
1994-95	20.50	20.75	20.50	14.36
1995-96	21.50	21.75	21.50	17.86
1996-97	24.25	24.50	24.25	21.46
1997-98	35.00	36.00	35.00	18.75
1998-99	35.00	36.00	35.00	19.63
1999-00	35.00	36.00	35.00	22.85
2000-01	35.00	36.00	35.00	26.73
2001-02	42.00	43.00	42.00	22.00
2002-03	40.00	43.00	40.00	19.83
2003-04	40.00	41.00	40.00	19.26
2004-05	40.00	43.00	40.00	25.

Sugarcane support price is per 40 Kg , Retail Price is Season's Average
Source: MINFAL

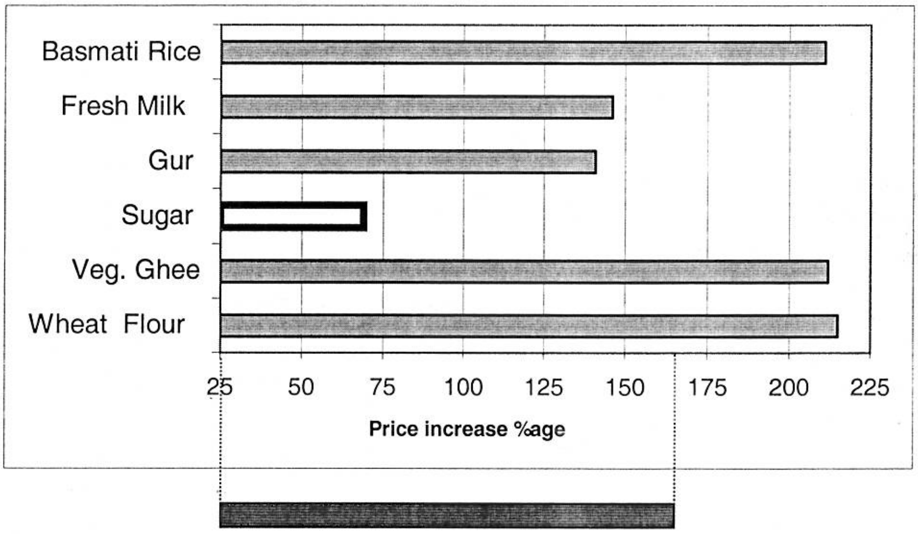
Season's Av. Sugar retail price / Sugarcane support price



Essential Commodities
Retail prices 1990-91 to 2003-04
In Comparison to sugar &
Graph showing % age of price increase in 13 years

Years	Wheat Flour Kg	Veg. Ghee	Sugar	Gur	Fresh Milk	Basmati Rice
1990-91	3.66	19.00	11.26	8.24	7.71	6.10
1991-92	4.20	20.53	11.62	8.67	8.82	6.97
1992-93	4.44	24.08	12.29	10.03	9.90	8.06
1993-94	4.93	29.09	12.91	10.49	11.07	8.77
1994-95	5.78	38.99	13.74	11.07	12.18	9.09
1995-96	5.90	39.38	16.76	14.54	13.67	11.27
1996-97	7.32	42.76	21.26	18.67	15.12	12.85
1997-98	8.64	45.78	19.54	18.91	16.27	13.40
1998-99	8.35	54.00	19.09	17.19	17.71	14.50
1999-00	8.92	49.14	21.11	19.81	17.91	15.71
2000-01	9.80	44.82	27.11	26.31	18.23	15.35
2001-02	9.67	49.20	22.87	23.12	17.92	15.49
2002-03	10.14	55.25	20.77	20.45	18.35	18.07
2003-04	11.53	59.23	18.99	19.85	18.99	19.00
% age	215.00	212.00	69.00	141.00	146.00	211.00

Sugar in odd position



Sugarcane support price moved from Rs. 15/50 – 41/- per 40 Kg i.e. 165% increase in the same period.

Whole change -

TABLE 6 (1)
MILLWISE SUGARCANE CRUSHING, RAW UTILIZATION SUGAR PRODUCTION, RECOVERY % AND MOLASSES PRODUCTION FOR SEASON 2003-2004

	PUNJAB	NO.OF DAYS	CANE CRUSHED	PRODUCTION TONNES	REC. %	MOLASSES PRODUCTION	REC. %
1	ABDULLAH	130	914,400	80,461	8.80	43,280	4.73
2	ADAM	137	393,211	34,000	8.65	19,659	5.00
3	ASHRAF	146	698,052	62,094	8.90	34,480	4.94
4	BABA FARID	136	444,548	38,006	8.55	20,900	4.70
5	BROTHERS	129	917,898	79,901	8.70	41,500	4.52
6	CHANAR	138	737,123	65,470	8.88	37,280	5.05
7	CHAUDHRY	128	908,996	80,739	8.87	40,200	4.41
8	CRESCENT	118	265,343	21,583	8.15	12,430	4.69
9	FATIMA	150	955,134	86,688	9.07	46,645	4.88
10	FAUJI	152	479,481	41,952	8.73	22,740	4.73
11	FECTO	142	722,488	60,207	8.33	35,225	4.87
12	G.SAMMUNDRI	126	342,163	27,045	7.93	17,000	4.98
13	HAMZA	145	1,717,989	178,362	10.38	79,040	4.60
14	H.WAQAS	135	965,573	84,395	8.74	45,730	4.74
15	Hunza (Q.G)	140	281,827	23,920	8.50	12,690	4.50
16	HUSEIN	135	622,148	55,690	8.95	28,639	4.60
17	INDUS	164	924,246	92,625	10.02	45,963	4.97
18	ITTEFAQ	131	674,482	62,775	9.31	31,432	4.65
19	J.D.W	167	1,183,944	124,856	10.55	53,984	4.56
20	KAMALIA	132	740,520	74,101	10.00	34,746	4.69
21	KASHMIR	130	892,492	81,634	9.15	41,582	4.65
22	KOHINOOR	133	583,339	53,446	9.16	25,857	4.43
23	LAYYAH	134	802,137	79,820	9.95	36,934	4.60
24	NATIONAL	152	621,369	53,175	8.56	28,330	4.56
25	NOON	132	462,299	41,919	9.07	20,947	4.53
26	PAHRIANWALI	136	590,201	51,498	8.72	31,250	5.29
27	PATTOKI	147	634,304	58,665	9.25	28,988	4.57
28	PHALIA	123	601,992	53,150	8.83	28,508	4.73
29	PUNJAB	140	543,211	51,116	9.41	24,268	4.46
30	RAMZAN	132	982,919	85,617	8.71	42,071	4.28
31	SHAHTAJ	128	981,923	91,723	9.34	45,742	4.66
32	SHAKARGANJ	159	1,614,539	136,813	8.47	81,953	5.07
33	SHEIKHOO	150	1,223,895	104,356	8.52	60,481	4.94
34	TANDLIANWALA	143	883,996	77,707	8.79	43,747	4.94
35	UNITED	140	688,943	63,109	9.16	31,027	4.50

Whole change.

	PUNJAB	NO.OF DAYS	CANE CRUSHED	PRODUCTION TONNES	REC. %	MOLASSES PRODUCTION	REC. %
36	YOUSAF	133	857,801	73,874	8.66	42,980	5.01
	Non- Members						
37	CHISHTIA *	135	550,000	50,000	8.90	25,000	4.80
38	G. B (PASRUR)*	100	200,000	17,000	8.50	8,500	4.00
TOTAL 2003-2004			**28,604,925**	**2,599,490**	**9.09**	**1,351,728**	**4.73**
TOTAL 2002-2003			27,583,061	2,351,102	8.52	1,304,284	4.73

TABLE 6 (2)

MILLWISE SUGARCANE CRUSHING SUGAR PRODUCTION, RECOVERY AND MOLASSES PRODUCTION FOR SEASON 2003-2004

S.No.	N.W.F.P	No. of Days	Cane Crushing	Sugar Production	Rec. %	Molasses Production	Rec.%
1	BANNU	122	252,450	18,785	7.40	11,905	4.69
2	CHASHMA	151	908,130	72,918	8.03	50,652	5.58
3	FRONTIER	145	145,686	15,002	10.38	4,792	3.32
4	KHAZANA	132	371,305	34,934	9.40	13,944	3.76
5	PREMIER	132	388,057	34,614	8.92	13,234	3.41
TOTAL 2003-2004		**NWFP**	**2,065,629**	**176,252**	**8.53**	**94,527**	**4.58**
TOTAL 2002-2003			1,787,810	144,917	8.11	78,823	4.41

Whole change

TABLE 6 (3)
MILLWISE SUGARCANE CRUSHING, RAW UTILIZATION SUGAR PRODUCTION, RECOVERY % AND MOLASSES PRODUCTION FOR SEASON ~~2002~~-2003 -04

SINDH		NO.OF DAYS	CANE CRUSHED	PRODUCTION TONNES	REC. %	MOLASSES PRODUCTION	REC. %
1	AL-ABBAS	130	562,096	53,134	9.45	29,700	5.28
2	AL-ASIF	109	229,327	20,556	8.98	11,558	5.05
3	AL-NOOR	123	756,425	70,360	9.30	37,687	4.98
4	ANSARI	115	587,108	59,520	10.14	30,288	5.16
5	ARMYWELFARE	109	340,775	34,559	10.14	16,290	4.78
6	BAWANY	107	415,614	41,522	10.01	19,940	4.81
7	DEWAN	120	746,663	72,055	9.65	37,401	5.01
8	DIGRI	151	517,720	48,736	9.41	29,120	5.63
9	FARAN	132	807,412	74,338	9.19	39,010	4.82
10	FAUJI- KH / ABBASI	105	275,883	26,913	9.76	14,109	5.11
11	FAUJI- TMK	122	360,099	35,345	9.82	16,660	4.63
12	HABIB	133	916,222	84,806	9.25	45,531	4.96
13	KHAIRPUR	139	431,220	37,430	8.68	22,125	5.13
14	LARR	112	365,691	34,775	9.50	17,509	4.79
15	MATIARI	163	526,847	45,579	8.65	27,526	5.23
16	MEHRAN	131	668,262	58,868	8.80	35,945	5.37
17	MIRPURKHAS	132	498,424	47,456	9.52	24,858	4.99
18	MIRZA	101	269,561	26,929	9.99	13,728	5.09
19	NAJMA	90	169,440	14,716	8.74	9,372	5.53
20	NAUDERO	101	101,823	8,672	8.52	5,343	5.25
21	PANGRIO	116	311,880	30,862	9.89	15,610	5.00
22	RANIPUR	130	351,898	29,964	8.52	17,541	4.98
23	SAKRAND	115	556,523	52,670	9.46	27,550	4.95
24	SANGHAR	159	532,824	47,274	8.90	34,936	6.56
25	SERI	140	284,200	26,269	9.20	16,250	5.70
26	SHAHMURAD	127	617,351	60,775	9.84	31,150	5.06
27	SINDABADGAR	117	446,339	45,468	10.19	22,580	5.06
28	THARPARKAR	119	343,195	31,720	9.25	17,843	5.20
TOTAL 2003-2004		**SINDH**	**12,990,824**	**1,221,268**	**9.40**	**667,160**	**5.14**
TOTAL 2002-2003			12,415,818	1,158,674	9.33	656,520	5.29
G.TOTAL 2003-2004			**43,661,377**	**3,997,010**	**9.15**	**2,113,415**	**4.84**
G.TOTAL 2002-2003			41,786,689	3,654,693	8.75	2,039,627	4.88

TABLE 6 (4)

MILL WISE BEET SLICING, SUGAR PRODUCTION, RECOVERY AND MOLASSES PRODUCTION FOR SEASON 2003-2004

	NWFP	No. of Days	Beet sliced	Production Tonnes	Rec. %	Total Mol. Production	Rec. %
1	FRONTIER	~~46~~	not operated ~~45,934~~	~~4,252~~	~~9.12~~	~~1,835~~	~~4.00~~
2	KHAZANA	23 ~~40~~	52,158 ~~90,269~~	5,325 ~~8,878~~	10.25 ~~9.83~~	1953 ~~2,795~~	3.74 ~~3.10~~
3	PREMIER	27 ~~42~~	68745 ~~113,969~~	6,048 ~~10,667~~	8.50 ~~9.20~~	2,334 ~~4,054~~	3.40 ~~3.56~~
TOTAL 2003-2004		NWFP	120,903 ~~250,171~~	11,373 ~~23,797~~	9.41 ~~9.51~~	4,287 ~~8,684~~	3.55 ~~3.47~~
TOTAL 2002-2003			222,063	22,066	9.94	8,490	3.82

TABLE 6(5)

PROVINCE WISE TOTAL PRODUCTION OF PAKISTAN

SUMMARY 2003-2004

	CANE CRUSHED	RAW UTILIZED	BEET SLICED	SUGAR PRODUCTION			TOTAL SUGAR	MOL. C+B+R
				(Cane)	(Raw)	(Beet)	2,159,055	
PUNJAB	22,776,832 ~~28,604,925~~	120,376 ~~NIL~~	NIL	2,046,353 ~~2,599,490~~	112,702 ~~NIL~~	NIL	~~1,038,705~~ ~~2,599,490~~	1,038,705 ~~1,351,728~~
SINDH	7,915,416 ~~12,990,824~~	49,322 ~~NIL~~	NIL	754,438 ~~1,221,268~~	46,604 ~~NIL~~	NIL	801,062 ~~1,221,268~~	393,287 ~~667,160~~
NWFP	1,409,491 ~~2,065,629~~	NIL	120171 ~~250,171~~	121,084 ~~176,252~~	NIL	11,373 ~~23,797~~	132,407 ~~200,049~~	64,171 ~~103,211~~
Total 2003-2004	32,101,739 **~~43,661,378~~**	169,698 **~~NIL~~**	120,171 **~~250,171~~**	2,921,845 **~~3,997,010~~**	159,306 **~~NIL~~**	11,373 **~~23,797~~**	3,092,505 **~~4,020,806~~**	1,496,163 **~~2,122,099~~**
Total 2002-2003	41,786,689		222,063	3,654,693		22,066	3,676,759	2,048,117

TABLE 7(1)
ESTIMATED GUR EQUIVALENT PRODUCTION FROM SUGARCANE NOT MILLED AFTER 15% DEDUCTION FOR SEED, FODDER AND WASTAGE ETC.

YEAR	GUR EQUIVALENT		
1990-91	853,800	Tonnes	
1991-92	600,100	Tonnes	
1992-93	688,000	Tonnes	
1993-94	653,400	Tonnes	
1994-95	827,100	Tonnes	
1995-96	875,000	Tonnes	
1996-97	709,400	Tonnes	
1997-98	346,485	Tonnes	
1998-99	332,990	Tonnes	
1999-00	511,470	Tonnes	*
2000-01	649,623	Tonnes	
2001-02	354,341	Tonnes	
2002-03	208,672	Tonnes	
2003-04	174,099	Tonnes	
2004-05			

Note:
* Gur equivalent is based on 8.5% recovery.
* These are not Gur production figures.
* (Recovery rate of Gur is 13.5-14.5%)
* Sugarcane Production 1999-2000 amended

TABLE 7(2)
SWEETENER CONSUMPTION IN PAKISTAN
SUGAR + GUR EQUIVALENT

Sugar Year	Population Millions	SUGAR CONSUMPTION M.T		Gur Equivalent	Total Sweetener	Sweetener kg per capita
		Year's	Kg Per Capita			
1993-94	121.48	2.763	22.74	0.653	3.416	28.11
1994-95	124.49	2.722	21.86	0.827	3.549	28.51
1995-96	125.87	2.797	22.22	0.875	3.672	29.17
1996-97	126.90	2.812	22.16	0.709	3.521	27.75
1997-98	129.97	3.004	23.11	0.346	3.350	25.78
1998-99	133.01	3.039	22.85	0.333	3.372	25.35
1999-00	135.90	3.172	23.34	*0.511	3.683	*27.10
2000-01	140.36	3.055	21.77	0.649	3.704	26.39
2001-02	143.17	3.252	22.71	0.354	3.606	25.19
2002-03	145.95	3.483	23.86	0.208	3. 691	25.29
2003-04	148.72	3.855	25.92	0.174	4.029	27.09

2004-05 * Sugarcane Production 1999-2000 amended

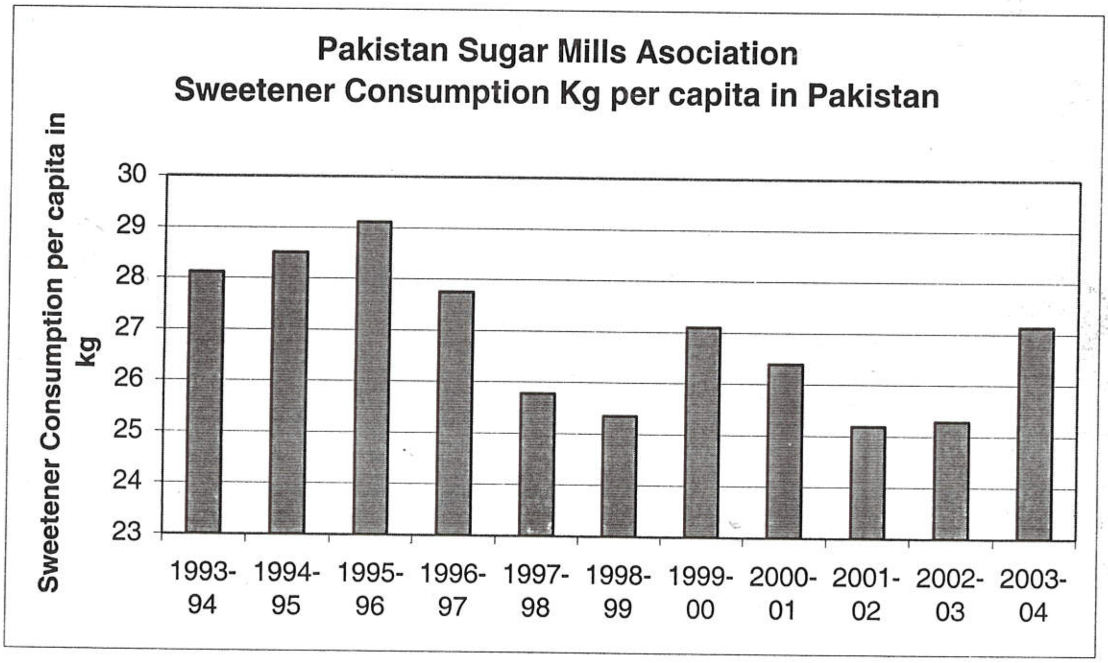


TABLE 8

SUGARCANE PLANTATION AREA, PRODUCTION, YIELD AND UTILIZATION OF SUGARCANE BY SUGAR MILLS

PAKISTAN

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1990-91	883,800	35,988,700	40.72	62.80
1991-92	879,800	34,204,000	38.90	72.49
1992-93	884,600	38,058,900	43.02	71.66
1993-94	962,800	44,427,000	46.14	76.93
1994-95	1,009,000	47,168,400	46.75	72.49
1995-96	963,100	45,229,700	47.00	62.24
1996-97	964,500	41,998,400	43.54	65.13
1997-98	1,056,200	53,104,200	50.28	77.32
1998-99	1,155,100	55,191,100	47.78	77.90
1999-00 *	1,009,800	42,000,000	41.59	69.00
2000-01	960,000	43,590,000	45.41	67.47
2001-02	999,700	48,091,000	48.10	76.33
2002-03	1,099,700	52,049,000	47.33	80.28
2003-04	1,074,700	53,800,000	50.00	81.19
2004-05				

PUNJAB

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1990-91	525,600	19,633,400	37.35	61.60
1991-92	516,900	18,580,800	35.95	63.21
1992-93	536,100	20,044,800	37.39	67.02
1993-94	596,200	24,510,000	41.11	81.87
1994-95	656,700	28,268,000	43.00	74.20
1995-96	605,600	26,880,000	44.40	63.22
1996-97	604,200	24,010,200	39.74	67.86
1997-98	685,300	32,110,600	46.86	80.67
1998-99	780,300	33,382,800	42.78	78.12
1999-00 *	672,100	25,000,000	37.20	67.32
2000-01	615,000	26,740,000	43.48	67.57
2001-02	657,000	31,803,000	48.40	79.40
2002-03	735,000	33,169,000	45.12	83.15
2003-04	709,000	34,419,000	49.00	83.10
2004-05				

* Cane production 1999-00 amended

SINDH

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1990-91	253,099	12,511,135	49.43	76.71
1991-92	255,280	14,240,476	55.78	83.00
1992-93	248,000	13,556,800	54.66	93.85
1993-94,	265,800	15,420,000	58.01	84.51
1994-95	249,700	14,310,300	57.30	84.12
1995-96	254,400	13,737,200	54.00	75.28
1996-97	251,200	13,110,600	52.19	78.68
1997-98	261,600	15,990,600	61.16	86.58
1998-99	270,800	17,050,700	62.96	88.53
1999-00	230,600	12,100,000	51.27	83.99
2000-01	239,000	12,050,000	50.42	87.08
2001-02	241,000	11,416,000	47.37	89.90
2002-03	259,000	13,798,000	53.27	89.98
2003-04	260,000	14,612,000	56.00	88.90
2004-05				

N.W.F.P

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1990-91	104,600	4,516,100	43.17	20.18
1991-92	107,000	4,563,200	42.64	23.97
1992-93	99,900	4,428,400	44.33	25.25
1993-94,	100,300	4,470,000	44.57	24.25
1994-95	102,100	4,562,200	44.70	25.86
1995-96	102,500	4,583,000	44.70	17.84
1996-97	108,400	4,841,600	44.66	15.38
1997-98	108,600	4,956,500	45.64	26.30
1998-99	103,300	4,719,500	45.68	38.53
1999-00*	106,300	4,900,000	46.10	26.40
2000-01	106,000	4,800,000	45.28	17.64
2001-02	101,000	4,787,000	47.40	26.94
2002-03	105,000	5,049,000	48.08	35.40
2003-04	105,000	4,745,000	45.00	43.53
2004-05				

* **Cane production 1999-00 amended**

BALOCHISTAN

1990-91	500	23,600	47.20	-
1991-92	600	26,300	43.83	-
1992-93	600	28,900	48.17	-
1993-94	500	25,000	50.00	-
1994-95	500	27,900	55.80	-
1995-96	600	29,500	49.20	-
1996-97	700	36,000	51.43	-
1997-98	700	37,500	53.57	-
1998-99	700	38,100	54.40	-
1999-00	800	43,400	54.20	-
2000-01		N.A		
2001-02	700	35,000	50.00	-
2002-03	700	33,000	47.14	
2003-04	700	34,000	48.57	-
2004-05				

SOURCE: **Federal Bureau of Statistics.**

TABLE 9
IMPORT OF REFINED SUGAR

YEAR	QUANTITY TONNES	VALUE IN "000" RS.	AVERAGE PRICE RS. PER TONNE.
1990-91	433,320	3,583,000	8,269
1991-92	116,741	914,117	7,830
1992-93	75,156	552,000	7,345
1993-94	47,669	444,105	9,316
1994-95	5,188	68,761	13,254
1995-96	3,214	50,239	15,631
1996-97	681,083	9,861,825	14,480
1997-98	10,990	1,685,859	15,189
1998-99	10,097	152,591	15,113
1999-00	66,627	769,179	11,545
2000-01	930,142	14,488,243	15,576
2001-02	85,037	1,472,326	17,314
2002-03	8,315	152,746	18,370
2003-04	11,398	188,509	16,539
2004-05			

TABLE 10
EXPORT OF SUGAR

YEAR	QUANTITY TONNES	VALUE IN RS. "000"	AVERAGE PRICE RS.PER TONNE.
1993-94	121,565	1,204,964	9,912
1994-95	315,886	3,770,558	11,936
1995-96	29,134	350,066	12,016
1996-97	-	-	-
1997-98	210,632	2,897,750	13,757
1998-99	906,602	11,549,170	12,739
1999-00	-	-	-
2000-01	-	-	-
2001-02	-	-	-
2002-03	45,669	627,949	13,750
2003-04	116,175	1,589,210	13,679
2004-05			

Data in Table 9 and 10 are shown for fiscal year
Source: Federal Bureau of Statistics.

TABLE 11

EXPORT OF MOLASSES

YEAR	QUANTITY TONNES	VALUE IN RS. "000"	AVERAGE PRICE RS. PER TONNE.
1990-91	776,071	823,636	1,061.29
1991-92	947,000	1,351,762	1,427.41
1992-93	892,618	1,396,111	1,564.06
1993-94	703,450	993,627	1,412.50
1994-95	769,636	1,213,545	1,576.78
1995-96	806,399	1,852,514	2,297.26
1996-97	1,056,134	2,021,755	1,914.30
1997-98	1,359,328	2,542,504	1,870.41
1998-99	1,688,505	1,802,899	1,067.75
1999-00	1,748,000	2,200,000	1,258.58
2000-01	1,190,012	2,456,573	2,064.32
2001-02	1,607,380	3,898,800	2,425.56
2002-03	1,272,630	2,652,975	2,084.63
2003-04	1,457,283	2,698,964	1,852.05
2004-05			

Source: Federal Bureau of Statistics
Data in table 11 is for Fiscal Year

TABLE 12

EXPORT OF FERMENTATION ETHYL ALCOHOL (NOT DENATURED)

YEAR	QUANTITY LTRS.	VALUE RS."000"	AVERAGE PRICE PER LTR.
1990-91	8,229,448	61,090	07.42
1991-92	7,636,000	55,332	07.25
1992-93	8,660,900	90,213	10.42
1993-94	13,206,697	125,866	09.54
1994-95	6,050,200	68,137	11.26
1995-96	1,166,000	16,856	14.45
1996-97	1,232,145	18,273	14.83
1997-98	4,107,000	69,646	16.96
1998-99	6,722,000	115,788	17.22
1999-00	7,608,000	136,364	17.92
2000-01	10,061,000	208,082	20.68
2001-02	14,594,000	341,438	23.39
2002-03	16,341,575	342,658	20.96
2003-04	35,921,065	692,840	19.29

Source : Federal Bureau of Statistics
Data is for Fiscal Year.

FORMER CHAIRMEN OF PAKISTAN SUGAR MILLS ASSOCIATION

1965-1966	Dr. S.M. Momen
1966-1967	Colonel Muzaffar Khan
1967-1968	Mr. M Hussain
1968-1969	Nawabzada M. Munir Khan
1969-1970	Mr. Hussain
1970-1971	Mr. Khaliq Dar Noon
1971-1972	Mr. Ahmed Ibrahim
1972-1973	Mr. Taj Muhammad Khanzada
1973-1974	Ch. Bashir Ahmed
1974-1975	Mr. M. Akram
1975-1976	Mr. Taj Muhammad Khanzada
1976-1977	Mr. Mian Bashir Ellahi
1977-1978	Mr. M. Akram
1978-1979	Mr. Taj Muhammad Khanzada
1979-1980	Malik Manzoor Hayat Noon
1980-1982	Mr. M.Akram
1982-1983	Mr. Taj Muhammad Khanzada
1983-1984	Mr. Altaf M.Saleem
1984-1985	Mr. M. Akram
1985-1986	Mr. Taj Muhammad Khanzada
1986-1987	Mr. Altaf M. Saleem
1988-1990	Mr. M. Akram
1990-1992	Syed Abbas Shah
1992-1994	Mr. Altaf M. Saleem
1994-1996	Mr. Ismail Zakaria
1996-1998	Mr. Abbas Sarfaraz Khan
1998-2000	Mr. S. M. Tahir
2000-2002	Mr. Ashraf W. Tabani
2002-2004	Mr. Iskander M Khan
2004-2006	Ch. M Zaka Ashraf

ZONEWISE LIST OF SUGAR MILLS LOCATION AND DISTRICT PUNJAB ZONE

Mills Name & Address		Tel & Fax	Mills Location/ Dist.
Abdullah Sugar Mills Ltd., 103/B-1, M.M. Alam Road, Lahore	Fx.	(042)-5713969 (042)-5758467	**Depalpur Okara**
Adam Sugar Mills Ltd., 345-A/1 , Gulberg-III Opp: Wyeth Laboratories , Lahore	Fx.	(042)-575216 (021)-2417812-7 (021)-2427560	**Chistian Bahawalnagar**
Ashraf Sugar Mills Ltd., 128 Tufail Road, Lahore Cantt.	Fx.	(042)-6655002-3 (042)-6653515	**Ashrafabad Bahawalpur**
Baba Farid Sugar Mills Ltd., 1st Floor Nawa-I- Waqt House 4- Shahrae Fatima Jinnah Lahore.	Fx.	(042)-6368671 (042)-6306747	**Okara Okara**
Brother Sugar Mills Ltd., 135-Upper Mall, Lahore.	Fx.	(042)-5757013-6 (042)-5710417	**Chunian Kasur**
Chanar Sugar Mills Ltd., 40 -A, Lawrence Road Lahore	Fx.	(042)-6302118-9 (042)-6362054-5	**Faisalabad**
Chaudhry Sugar Mills Ltd., 7- A, New Muslim Town Lahore	Fx.	(042)-5834634 / 5862044 (042)-5857232	**Gojra Toba Tek Singh**
Crescent Sugar Mills Ltd., New Lahore Road, Nishatabad, Faisalabad	Fx.	(041)-750363 (041)-750366	**Nishtabad Faisalabad**
Fatima Sugar Mills Ltd., 2nd Floor, Trust Plaza, Opp. Telephone Exchang LMQ Road, Multan.	Fx.	(061)-546318 (061)-546218 (061)- 511677	**Kot Addu Muzafargarh**

Mills Name & Address		Tel & Fax	Mills Location / Dist.
Fauji Sugar Mills Ltd., (Sangla Hills) Fauji Foundation (Sugar Division), Head Office Tippu Road, Chaklala	 Fx.	(051)-5951721-40 (051)-5951742	**Sangla Hill** **Sheikhupura**
Fecto Sugar Mills Ltd., Room # 101 & 102, 1st Floor Panorama Centre, Raja Ghazanfar Ali Road Karachi	 Fx.	(021)-5682178 (021)- 5684709	**Darya Khan** **Bhakkhar**
Gojra Samundri Sugar Mills Ltd., Monnoo House,3 Montgomery Road, Lahore	 Fx.	(042)-6312978-9 (042)-6312982	**Gojra** **Faisalabad**
Hamza Sugar Mills Ltd., A/22, S.I. T. E. Maripur Road Karachi	 Fx.	(021)-2564594 (021)-2561873	**Jetha Bhutta** **Rahimyar Khan**
Haseeb Waqas Sugar Mills Ltd., 103/ B-1, M. M Alam Road Gulberg III Lahore	 Fx.	(042)-5713969 (042)-5758467	**Nankana** **Sahib** **Sheikhpura**
Hunza (Qand Ghar) Sugar Mills 31/7-A, Abubakar Block, Garden Town Lahore.	 FX.	042-7533135 042-7533137	**Shahkot** **Faisalabad**
Husein Sugar Mills Ltd., 30-A/E-1, old FCC Gulberg III, Back to Gaddafi Stadium, Lahore	 Fx.	(042)-5762089-90 (042)-5712680	**Jaranwala** **Faisalabad**
Indus Sugar Mills 93-B, New Muslim Town, Lahore	 Fx.	(042)-5882801-2 (042)-5835180	**Kot Bahadur** **Rajan Pur**
Ittefaq Sugar Mills Ltd., M. M Alam Road, 107/B, Gulberg III, Lahore	 Fx.	(042)-5765021-6 (041)-5759546	**Pakpattan** **Pakpattan**

Mills Name & Address	Tel & Fax	Mills Location / Dist.
JDW Sugar Mills Ltd., 32-N, Gulberg- II Industrial Area, Lahore	(042)-5761541-2 Fx. (042)-5761544	**Mouza Shirin Rahimyar Khan**
Kamalia Sugar Mills Ltd., Askari Villas No. 2, Sarwar Road, Near Garrison Cinema, Lahore Cantt	(042)-6674345 Fx. (042)-6668092	**Kamalia Toba Tek Singh**
Kashmir Sugar Mills Ltd., 107/B, M.M. Alam Road, Gulberg III, Lahore	(042)-5765021-6 Fx. (042)-5759546	**Shorkot Jhang**
Kohinoor Sugar Mills Ltd., 61 – B-1 Gulberg III, Lahore	(042)-5750174 Fx. (042)-5710972	**Jauharabad Khushab**
Layyah Sugar Mills Ltd., 17- G Gulberg III Lahore	(042) 5883220 Fx. (042)5883219	**Layyah Layyah**
National Sugar Mills Ltd., 146 M Block, Gulberg III Lahore	(042)-5835517 / 5838480 Fx. (042)-5838400	**Bhalwal Sargodha**
Noon Sugar Mills Ltd., 6th Floor, EFU Building Jail Road Lahore	(042)-5715845-8 Fx. (042)-5715698	**Bhalwal Sargodha**
Pattoki Sugar Mills Ltd., T-09 , 3rd Floor, Hafeez Centre, 75-E /1,Gulberg III Lahore	(042)-5711061-5 Fx (042) 5711068.	**Pattoki Kasur**
Pahrianwali Sugar Mills Ltd., F- 1/14, Canal Cottage New Muslim Town, Lahore	(042)-5868780 Fx. (042)-5868547	**Lalian Jhang**
Phalia Sugar Mills Ltd., 182- Abubakar Block New Garden Town, Lahore	(042) 111-66-66-47 Fx. (042)-5845525	**Phalia Mandi Bahauddi**

Mills Name & Address		Tel & Fax	Mills Location / Dist.
Punjab Sugar Mills Ltd., 20- E -I (C) Gulberg – III Lahore	 Fx.	(042)-5712487-8 (042)-5710879	**Mian Channu** **Khanewal**
Ramzan Sugar Mills Ltd., 7- A New Muslim Town Lahore	 Fx.	(042)-5834634 / 5863663 (042)-5857232	**Chiniot** **Jhang**
Shahtaj Sugar Mills Ltd., 72/C-1, Gulberg III Lahore	 Fx.	(042)-5710482-4 (042) 5711904	**Mandi Bahauddin** **Gujrat**
Shakarganj Mills Ltd., Management House Toba Tek Singh Road, Jhang.	 Fx.	(0471)-614971 (0471)-620270	**Jhang** **Jhang**
Sheikhoo Sugar Mills Ltd., 11-Commercial Area, L.C.C.H.S, Lahore , Cantt	 Fx.	(042)-5728904-6 (042)-5720745	**Kot Adu** **Muzafargarh**
Tandlianwala Sugar Mills Ltd., 32- N-A, Gulberg-II Industrial Area, Lahore	 Fx.	(042)-5715081 (042)-57109299	**Kanjwani** **Faisalabad**
United Sugar Mills Ltd., 173/L Model Town Extension, Lahore.	 Fx.	(042)-5164929 5176913 (042)-5165912	**Sadiqabad** **Rahim Yar Khan**
Yousaf Sugar Mills Ltd., 103-/B-1, M.M. Alam Road, Lahore	 Fx.	(042)-5713969 (042)-5758467	**Shahpur** **Sargodha**

Nonmember Sugar Mills

Chishtia Sugar Mills Ltd., 88 - A, Canal Park, Gulberg – II, Lahore.	 Fx.	(042)-5752124-6 (042)-5760329	**Sillanwali** **Sargodha**
Gunj Buksh(Pasrur) Sugar Mills Ltd., 21/69-F.C.C. Green Villas, Gulberg-II, Lahore.		042-5752125	**Pasrur** **Sailkot**

SINDH ZONE

Mills Name & Address		Tel & Fax	Mills Location / Dist.
Al-Abbas Sugar Mills Ltd., Pardeis House, Survey # 2/1, R.Y – 16, Old Queen Road, Karachi	 Fx.	021-2470220-29 021-2470090, 96	**Mirwah Gorchani** **Mirpurkhas**
Al-Asif Sugar Mills Ltd., 4th Floor, Bank House No.2 Habib Square, M.A. Jinnah Road, Karachi	 Fx.	021-2427216/2410885 021-2427216 021- 2429092	**Garho** **Thatta**
Al-Noor Sugar Mills Ltd., 96-A, Sindhi Muslim Society, Karachi	 Fx.	021-4550161-63 021-4551990 / 4559863 021-4556675	**Taluka Moro** **Nawabshah**
Ansari Sugar Mills Ltd., 41-K, Block 6, P.E.C.H.S, Karachi-75400	 Fx.	111-484-848 021-4531105 / 4531642 021-4546456, 4535374	**Matli** **Hyderabad**
Army Welfare Sugar Mills Badin	 Fx.	(0227) 61205, 61970 (0227) 61733	**Badin**
Bawany Sugar Mills Ltd., 4th Floor, Bank House # 2, Habib Square, M.A. Jinnah Road, Karachi	Fx.	021-2427216, 2427073 021-2429092	**Talhar** **Badin**
Dewan Sugar Mills Ltd., 3-A, Lalazar, Dewan Centre, Beach Hotel Road, Karachi	 Fx.	111-313-786 021- 5611098-9 021-5610765	**Budho Talpur** **Thatta**
Dewan Khoski Sugar Mills 3-A, Lalazar, Dewan Centre, Beach Hotel Road, Karachi	 Fx.	111-313-786 021- 5611098-9 021-5610765	**Khoski** **Badin**
Digri Sugar Mills Ltd., 48 J /1 Block 6, P.E.C.H.S. Karachi	 Fx.	021-4541195-8 021- 4534501	**Digri** **Mirpurkhas**

Mills Name & Address		Tel & Fax	Mills Location
Faran Sugar Mills Ltd., 3rd Floor, Bank House # 1, Habib Square, M.A. Jinnah Road, Karachi	 Fx.	021-2418050-4 021-2421010	**Sheikh Bhirkio** **Hyderabad**
Habib Sugar Mills Ltd., 4th Floor, Imperial Courts, Dr. Ziauddin Ahmed Road,Karachi	 Fx.	(021)- 5680036-9 (021)- 5684086	**Nawabshah**
Khairpur Sugar Mills Ltd., ST.- 10, D/14, Jumani Arcade Main University Road, Karachi	 Fx.	(021)- 4931021-4 (021)- 4933313	**Naroo Dhoro** **Khairpur**
Larr Sugar Mills Ltd., 16-E, Block 6, Rashid Minhas Street, P.E.C.H.S Karachi.	 Fx.	(021)- 4545591-4 (021)-4537720	**Deh Kinjhar –** **Sajawal** **Thatta**
Matiari Sugar Mills Ltd., C-48, KDA Scheme No.1 Karachi. 75350	 Fx.	(021)-4521382, 4529698 (021)- 4541734	**Matiari** **Hyderabad**
Mehran Sugar Mills Ltd., 8th Floor, Adamjee House, I.I. Chundrigar Road, Karachi.	 Fx.	(021)-2417131-4 (021)- 2416477	 **Tando Allah Yar** **Hyderabad**
Mirpurkhas Sugar Mills Ltd., 2nd Floor, Modern Motors House, Beaumont Road, Karachi.	 Fx.	(021)-5682565-9 (021)-5682839	**Mirpurkhas** **Mirpurkhas**
Mirza Sugar Mills Ltd., 10th Floor, Lakson Square, Building No. 1, Sarwar Shaheed Road, Karachi	 Fx.	(021)-5680151 (021)- 5680183	**Deh Charo** **Tappo Badin**
Najma (Thar) **Sugar Mills Ltd.,** F-58, Park Lane Block –5 Clifton, Karachi	 Fx.	 (021)5831082/5860234 (021) – 5831069	 **Jhuddo** **Mirpurkhas**

Mills Name & Address		Tel & Fax	Mills Location / Dist.
Naudero (Larkana) **Sugar Mills Ltd.,** 2nd Floor Block –4, Hockey Club Of Pakistan Stadium, Karachi-75350	Fx.	(021) 5655131-4 (021) 5680533	**Naudero** **Larkana**
Pangrio Sugar Mills Ltd., 10th Floor Lakson Square, Building No. 1 Sarwar Shaheed Road, Karachi	Fx.	(021)- 5680151 (021)-5680183	**Deh Rajauri-2** **Badin**
Ranipur Sugar Mills Ltd., 1308 Chapal Plaza, Hasrat Mohani Road, Off. I.I. Chundrigar Road, Karachi	Fx.	(021)-2411368-9 (021)-2413547	**Ranipur** **Khairpur**
Sakrand Sugar Mills Ltd., 41-K Block 6 , P.E.C.H.S., Karachi	Fx.	111-484-848 (021)- 4531642, 4531105 (021)- 4535374, 4546456	**Qazi Ahmed** **Nawabshah**
Sanghar Sugar Mills Ltd., 101- Ocean Centre, Talpur Road, Karachi	Fx.	(021)-2427171-2 (021)- 2410700	**Sindhri** **Sanghar**
Seri Sugar Mills Ltd., 1st Floor, Hassan Ali Centre, Opp. M.W. Tower, M.A. Jinnah Road, Karachi.	Fx.	(021)-2418389-90/2439630 (021)-2437828 (021)-2413600	**Deh Norai Jagir** **Hyderabad**
Shahmurad Sugar Mills, Ltd., 96-A, Sindhi Muslim Society, Karachi	Fx.	(021)-4550161-3 / 4550031 (021)-4556675	**Jhok Sharif** **Thatta**
Sindh Abadgar's Sugar Mills Ltd., 164-L Block 3, P.E.C.H.S., Karachi	Fx.	(021)-4557936/4559741 (021)-4558109	**Deenpur** **Hyderabad**
TMK Sugar Mills Ltd., 1st Floor, Hassan Ali Centre, Opp. M.W. Tower, M.A. Jinnah Road, Karachi.	Fx.	(021)-2418389-90/2439630 (021)-2437828 (021)-2413600	**TMK** **Hyderabad**

Non Member Sugar Mills

Bachani Sugar Mills Ltd., 2nd Floor Europa Centre, Hasrat mohani Road, Off.I.I Chundrigar Road, Karachi	 Fx.	(021)-2627607 (021)-2638459	**Tando Allah Yar** **Hyderabad**
Dadu Sugar Mills Ltd., Under Privatization commission of Sindh		(021)- 9202077	**Piarogoth** **Dadu**
Kiran Sugar Mills Ltd., 40-D,East Avenue, Phase-1, Defense Housing Authority, Karachi.			**Duber Road** **Sukkur**
Tharparkar Sugar Mills Ltd., C-27, Beverly Estate Ploat No. F-24, Block –9 Kehkashan Clifton, Karachi	 Fx.	(021)-5863730-1 (021)-5863729	**Tharparkar** **Mirpurkhas**
Thatta Sugar Mills Ltd., Under Privatization Commission of Sindh			**Deh Bijora** **Thatta**

N.W.F.P ZONE

Mills Name & Address	Tel & Fax		Mills Location
Bannu Sugar Mills Ltd., Serai Naurang Dist. Bannu	 Fx	(09261)2005 (09261)2309 (09261)2302	**Serai** **Naurang** **Bannu**
Chashma sugar Mills Ltd., Gunner Lane Off II Fort Road, Peshawar Cantt	 Fx	(0961)750090 (0961)750091 (0961)750092	**D.I. Khan**
Frontier Sugar Mills Ltd., Gunner Lane Off II, Fort Road Peshawar Cantt.	 Fx	(0931)551041 (0931)551049 (0931)62989	**Takht-I- Bhai** **Mardan**

Mills Name & Address	Tel & Fax		Mills Location
Khazana Sugar Mills Ltd., House #332, St#35, Sector F-11/13, Islamabad	Fx.	051-2294167 051-2211892	**Peshawar**
Premier Sugar Mills Ltd., Mardan N.W.F.P.	Fx.	0931-62051-2 0931-62989	**Mardan**

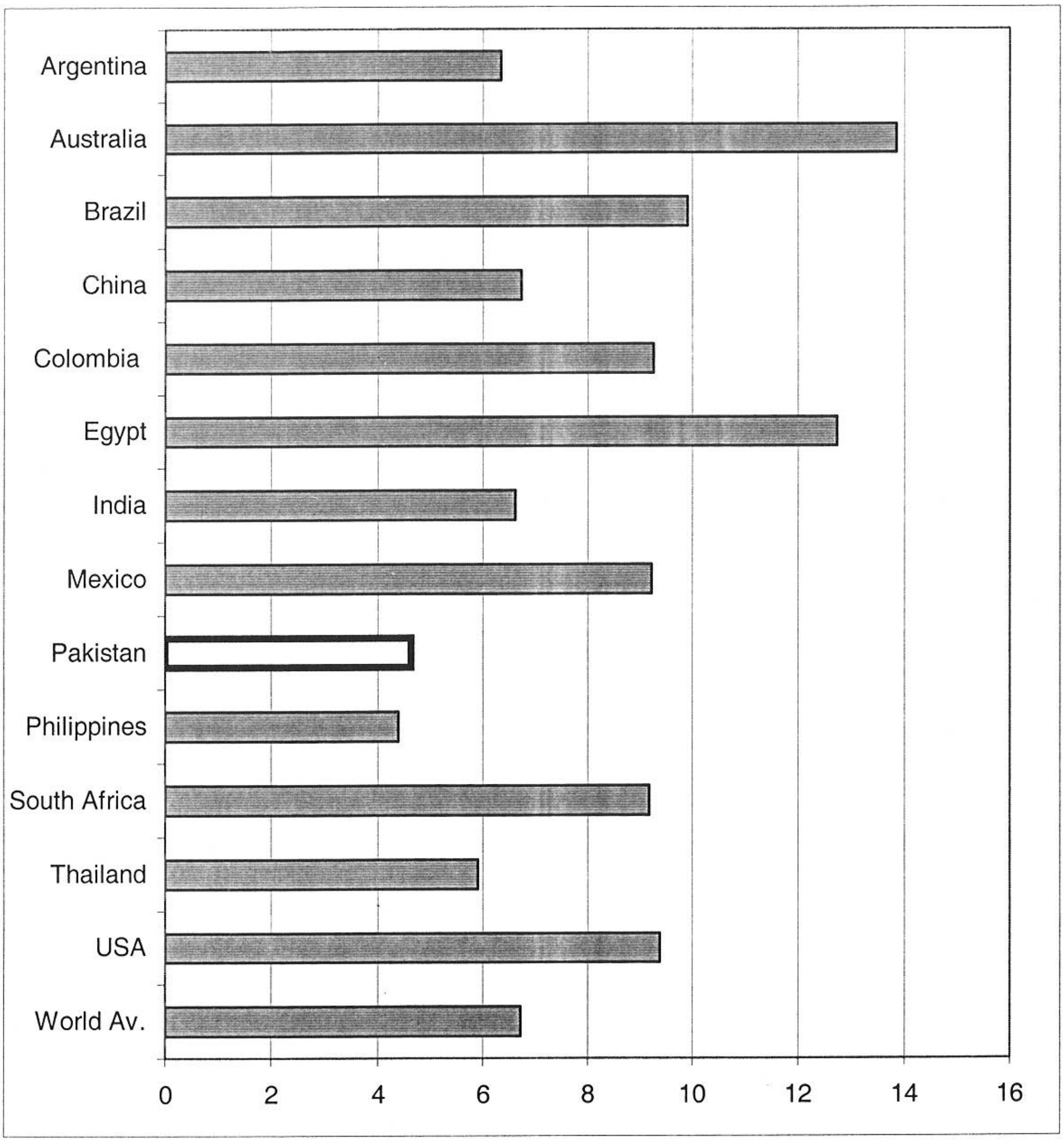
Non Member Sugar Mills

Saleem Sugar Mills Ltd., 65 Amin Building, The Mall, Lahore.	Fx.	042-7321043 042-7122378	**Charsadda**

AZAD KASHMIR

Mian Mohammad sugar mills Ltd.,	**Not available**	**Mirpur** **Azad Kashmir**

Per Hectare Sugar Yield
(Raw Value)
In major Cane Sugar Producing Countries



Note : The above data includes countries with production of 2.0 million tonnes and above

SUGAR AND SUGARCANE – I

Sugar Year (Oct – Sept.)	1995-1996	1996-1997	1997-1998	1998-1999	1999-2000
Sugarcane Area HA.	963,100	964,500	1,056,200	1,155,000	1,009,800
Sugarcane produced	45,229,700	41,998,400	53,104,200	55,191,100	42,000,000
Yield Tonnes / Ha	47.00	43.54	50.28	47.77	41.59
Cane Utilized by Mills	28,151,434	27,352,918	41,062,268	42,994,911	28,982,711
% age of utilization	62.24	65.13	77.32	77.90	69.00
Cane support / Indicative Price Punjab, NWFP / Sindh	21.5/ 21.75	24.25/ 24.5	35 / 36	35 / 36	35/36
Recovery % age	8.70	8.69	8.64	8.21	8.33
Sugar Production (Cane)	2,449,598	2,378,751	3,548,953	3,530,931	2,414,746
Sugar Production (Beet)	20,435	14,610	6,267	10,831	14,618
Sugar Production (Raw)					
Total Sugar Production	2,470,033	2,393,361	3,555,220	3,541,762	2,429,364
Beginning Stocks 1st Oct.	264,689	103,553	413,290	513,062	371,389
Import Refined Sugar	166,472	728,501	26,345	4,129	420,740
Total Available	2,901,194	3,225,416	3,994,863	4,058,946	3,221,493
Export	100	-	477,331	648,230	22,160
End Stock 30th Sept.	103,553	413,290	513,062	371,389	27,274
Consumption / Marketing Mills Sale + import – (Export)	2,797,541	2,812,126	3,004,470	3,039,327	3,172,059
Average Consumption /Month	233,100	234,300	250,400	253,300	264,300
Season's Av. Domestic Retail price Rs. / Kg	17.86	21.46	18.75	19.63	22.85
Int. Sugar Av. Trade price US$ / Tonne	383.75	319.21	272.46	216.28	200.52

- Sugarcane production & Utilization controversial figures for 1999-2000 amended.
- Refined value of Raw unrecorded imports 1996-97 & 1997-98 added to imports

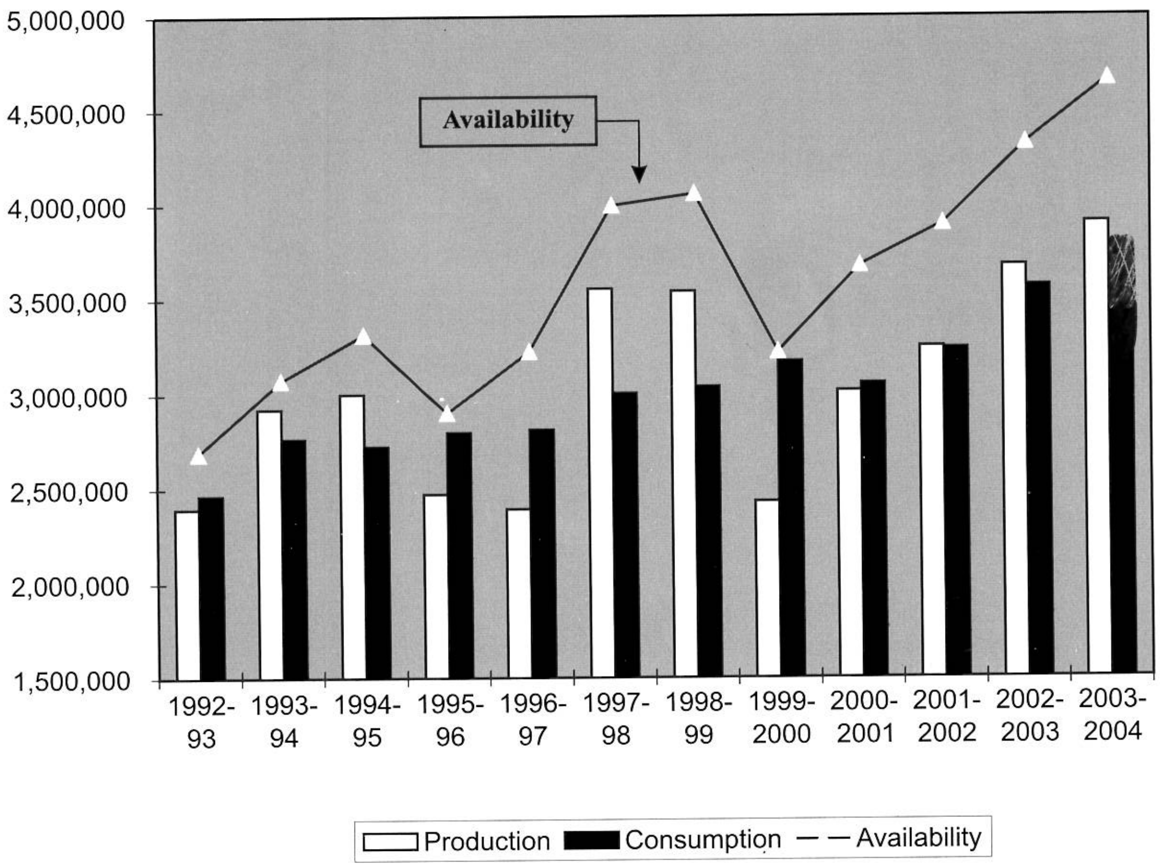
SUGAR AND SUGARCANE – II

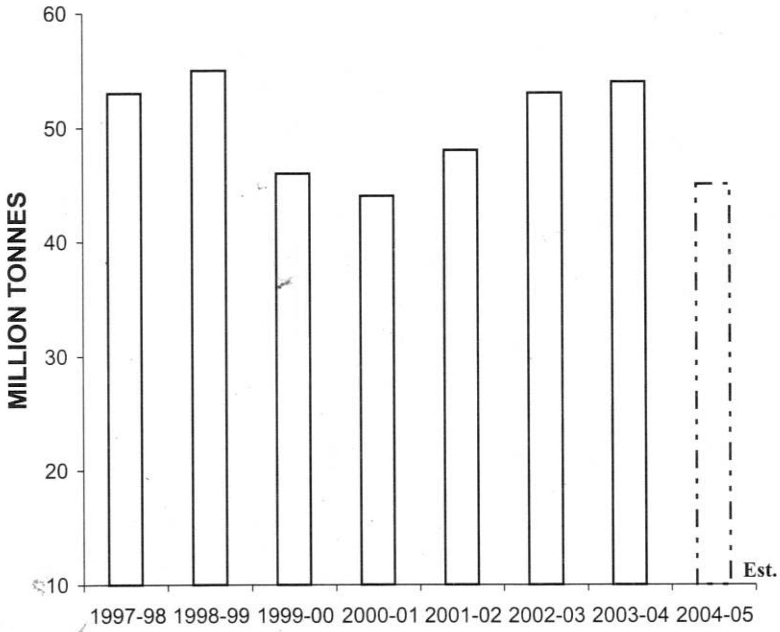
Sugar Year (Oct - Sept.)	2000-2001	2001-2002	2002-2003	2003-2004	Est. 2004-2005
Sugarcane Area HA.	960,000	999,700	1,099,700	1,074,700	949,700
Sugarcane produced	43,590,000	48,091,000	52,049,000	53,800,000	44,635,900
Yield Tonnes / Ha	45.41	48.10	47.33	50.00	47.00
Cane Utilized by Mills	29,408,880	36,708,638	41,786,689	43,661,377	35,710,000
% age of utilization	67.47	76.33	80.28	81.15	80.00
Cane support /Indicative Price Punjab, NWFP / Sindh	35/36	42/43	40 / 43	40 / 41	40 / 41
Recovery %age	8.39	8.71	8.74	9.15	8.75
Sugar Production (cane)	2,466,788	3,197,745	3,652,745	3,997,010	3,124,500
Sugar Production (Beet)	17,276	29,173	22,066	23,796	24,000
Sugar Production (Raw)	531,930	22,111	1,945		
Total Sugar Production	3,015,994	3,249,029	3,676,756	4,020,806	3,148,500
Beginning Stocks 1st Oct.	27,274	620,791	637,149	759,103	809,356
Import Refined Sugar	632,645	27,494	9,052	10,324	
Total Available	3,675,913	3,897,314	4,322,957	4,790,233	3,957,900
Export	-	8,000	80,000	125,502	
End Stock 30th Sept.	620,791	637,149	759,103	809,356	257,900
Consumption / Marketing Mills Sale + Import – (Export)	3,055,122	3,252,165	* 3,483,854	* 3,855,376	3,700,000
Average Consumption/ Month	254,600	271,000	290,321	321,281	
Season's Av. Domestic Retail price Rs. / Kg	26.73	22.96	20.12	19.26	
Int. Sugar Av. Trade price US $ / Tonne	242.90	234.30	222.85	224.15	

- (2002-03 & 2003-04) Domestic consumption has been exceptionally high due to Afghan refugees repatriation

Dom. Production Availability
& consumption

Pakistan Sugar Mills Association
Domestic Production, Availability & Consumption
Sugar Year Oct. to Sept. 1992-2003

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50
40
30
20
10
MILLION TONNES
Est.
1997-98
1998-99
1999-00
2000-01
2001-02
2002-03
2003-04
2004-05