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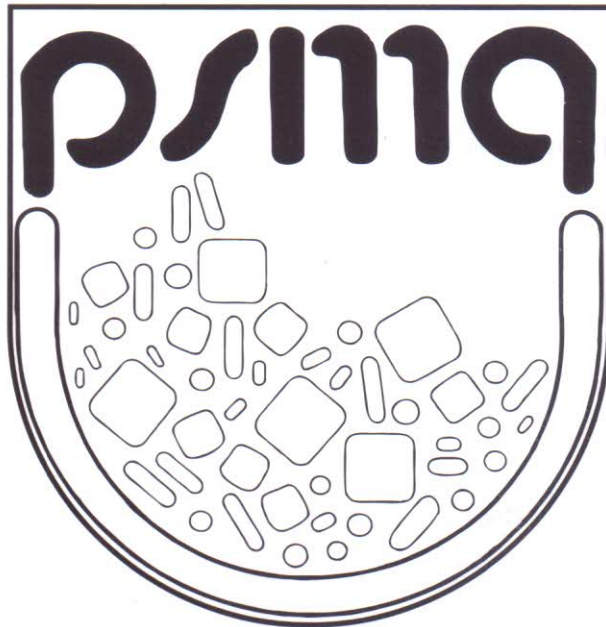
**ANNUAL REPORT
2019**



**PAKISTAN SUGAR MILLS ASSOCIATION
ISLAMABAD**

19

**ANNUAL REPORT
2019**



**PAKISTAN SUGAR MILLS ASSOCIATION
ISLAMABAD**

**MANAGEMENT OF
PAKISTAN SUGAR MILLS ASSOCIATION
2019-20**

Executive Committee

1. Mr. Aslam Faruque	Chairman
2. Mr. Javed A. Kayani	Senior Vice Chairman
3. Mr. Nauman A. Khan	Vice Chairman
4. Dr. Tara Chand	Vice Chairman
5. Mr. Iskander M. Khan	Vice Chairman
6. Mr. Sheikh Ahsan Latif	Member
7. Mr. Ikram ul Haq	Member
8. Mr. Muhammad Rafique	Member
9. Mr. Ahmed A. Bawany	Member
10. Mr. Zaid Zakria	Member
11. Mr. Muhammad Munir	Member
12. Mr. Muhammad Wasif	Member

Secretariat

**Mr. Inayatullah Khan
Secretary General**

**Office 102, Gulistan Khan House,
Fazl-e-Haq Road, Blue Area, Islamabad**

Phone: 051-2150073-5

Fax: 051-2150076

Website: www.psmacentre.com

E- mail: psma.centre@gmail.com

**ZONAL COMMITTEES
2019-20**

Zonal Committee Punjab

- | | |
|---------------------------|----------|
| 1. Mr. Nauman A. Khan | Chairman |
| 2. Mr. Sheikh Ahsan Latif | Member |
| 3. Mr. Ikram Ul Haq | Member |
| 4. Mr. Muhammad Rafique | Member |

Zonal Secretariat

Mr. Muhammad Arif
Unit No. 2. Happy Homes
38-A, Main Gulberg,
Lahore

Acting Secretary
Tel: 042- 111-207-207
Fax: 042-357522940
Email: info@psma.pk

Zonal Committee Sindh

- | | |
|------------------------|----------|
| 1. Dr. Tara Chand | Chairman |
| 2. Mr. Ahmed A. Bawany | Member |
| 3. Mr. Zaid Zakria | Member |

Zonal Secretariat

Mr. Muhammad Yasin Tola
1st Floor Modern Motors House,
Beaumont Road,
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Acting Secretary
Tel: 021-35686526
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Email: psma_sz@ymail.com

Zonal Committee Khyber Pakhtunkhwa

- | | |
|----------------------------|----------|
| 1. Mr. Iskander M. Khan | Chairman |
| 2. Mr. Abdul Qadar Khattak | Member |
| 3. Mr. Mirza Nadeem | Member |

Zonal Secretariat

Mr. Wasiullah
Premier Sugar Mills &
Distillery Co. Ltd,
Mardan

Acting Secretary
Tel: 0937-862051-2
Fax: 0937-862989
Email: psmdn@premiergroup.pk

Annual Review
54th Annual General Meeting
Karachi December 18, 2019

Distinguished Members of Pakistan Sugar Mills Association

I would like to begin by acknowledging the tremendous efforts of Zonal Representatives of PSMA in efficaciously defending a counter narrative of Pakistan's sugar economy. I am honored to present the Annual Review of PSMA at the 54th Annual General Meeting for the session ending September 30, 2019. Bumper sugarcane crop (83mln tonnes), record sugar production (6.6mln tonnes) for 2017-18, and inadequate water supply down casted sugarcane plantation and per acre yield for 2018-19. There was 18% decline in area planted and 19% decline in sugarcane produced for 2018-19. From 2010-11 to 2018-19, Pakistan's sugar production has been, on average, 14% more than domestic consumption, putting a downward pressure on sugar price. The year 2019-20 could potentially face about 4% decline in area of sugarcane plantation on account of water constraint for sugarcane crop compared to other competing crops like, Maize, Rice and Cotton (Table-1).

Table-1

Final Estimate of Sugarcane Crop Area and Production 2017-18			
	Area (Ha)	Production (T)	Yield (T/Ha)
Punjab	859,130	55,067,490	64.1
Sindh	333,262	20,611,878	61.85
KP	148,534	7,609,972	51.23
Total	1,340,926	83,289,340	62.11
Final Estimate of Sugarcane Crop Area and Production 2018-19			
	Area (Ha)	Production (T)	Yield (T/Ha)
Punjab	710,610	44,906,310	63.19
Sindh	279,472	16,691,323	59.72
KP	110,991	5,532,012	49.84
Total	1,101,073	67,129,645	60.97

Sugar production in 2018-19 was 5.3mln tonnes. Supplemented by carry forward from 2017-18 season of 2.4 mln tonnes, total availability in the country was 7.7 mln tonnes (Table-2).

Table-2 Sugar Production for 2018-19

		“000” hectares, “000”tonnes(est.)
Sugarcane plantation	=	11,010
Sugarcane produced	=	67,130
Sugarcane crushed	=	49,768
Utilization by mill	=	74.3
Sugar produced from cane	=	5211
Sugar produced from beet	=	57
Sugar refined from raw	=	----
Total Sugar Produced	=	5,268
Carryover stocks 2017-18	=	2,425
Sugar availability for 2018-19		7,693
Export (Source: MOC)	=	★1,100
Domestic consumption 2018-19	=	5196
Carry forward for 2019-20	=	1,397

* Export allowed 1.1 mln tonnes was not totally utilized and the leftover unutilized export quota may push upward the carry forward for 2019-20.

Price of Sugar & Sugarcane 2018-19

Due to surplus supply in the pipeline for the first two & half quarters of the year, sugar ex-mill price during the year remained moderately depressed, even below its cost of production. In the absence of a mechanism for matching the cost of production with selling price of sugar, sugar industry incurred losses.

The average retail price of sugar during calendar year 2017 was Rs. 57.71/kg and dropped to Rs. 53.85/kg in calendar year 2018. Given the cost of production of Rs. 63.52/kg and sugarcane indicative price of Rs. 180/40kg for Punjab, KPK and Rs. 182/40 Kg for Sindh for the year 2018-19, losses to sugar millers were inevitable.

However, in late 2019 price structure improved after export. The average month wise ex-mill rate of sugar in Punjab and Sindh during the start of the sugar year (Oct-2018) was Rs. 48.9/kg and ended at Rs. 69.26/kg by Sep-2019, up by 41.64%. Similarly the whole sale price improved from Rs. 51.41 to Rs. 70.91, a 37.91% increase. The year average ex-mill price of sugar in 2018-19 was Rs. 59.05/kg, average whole sale price was Rs. 60.94/kg and average retail price was Rs. 64.27/kg. Table 3 & 4.

Table-3 Month wise Average Ex-Mill, Wholesale & Retail Price of Sugar Rs. /kg

Month	Ex-Mill Prices			Wholesale Price	Difference B/w Wholesale & Ex-Mills	Retail Price	Difference B/w Retail & Wholesale
	Punjab	Sindh	Average				
October, 2018	49	48.8	48.9	51.41	2.51	54.78	3.37
November, 2018	49.81	49.5	49.65	51.36	1.705	54.87	3.51
December, 2018	51.39	51.5	51.44	52.61	1.165	55.63	3.02
January, 2019	54.34	53	53.67	55.83	2.16	58.47	2.64
February, 2019	54.63	55	54.81	55.42	0.605	59.13	3.71
March, 2019	57.12	57	57.06	58.33	1.27	61.15	2.82
April, 2019	61.34	62	61.67	62.52	0.85	65.63	3.11
May, 2019	63.44	62	62.72	64.98	2.26	67.99	3.01
June, 2019	63.96	63	63.49	68.9	5.42	70.83	1.93
July, 2019	66.53	66	66.26	68.11	1.845	72.38	4.27
August, 2019	70.53	69	69.76	70.78	1.015	75.38	4.6
September, 2019	69.52	69	69.26	70.91	1.64	75.02	4.12
Percentage change from Oct 18 to Sep19	41.88%	41.39%	41.64%	37.91%		36.95%	

Source: PBS & Cane Commissioners

Table – 4 Sugar Retail---Market Monthly Average Prices Rs. /Kg

Month	2017	2018	2019
January	64.8	53.12	58.47
February	63.12	51.5	59.14
March	60.41	51.33	61.15
April	59.97	52.85	65.63
May	58.46	52.68	67.99
June	56.48	53.69	70.83
July	55.04	55.21	72.38
August	56.88	55.59	75.38
September	55.45	54.99	75.02
October	54.28	54.78	73.78
November	53.68	54.87	72.61
December	53.91	55.63	
Average	57.71	53.85	68.4

Source: PBS

Sugar Pricing Mechanism

Over the years, ratio of sugar retail price as compared to cane minimum price has decreased considerably. From 2003-04 till 2011-12, sugar retail price was 52% of sugarcane minimum price, on average. From 2011-12 till 2018-19, this ratio fell to 30-35%.

PSMA has relentlessly taken it numerous times up with the Federal Government to structure a feasible pricing mechanism for sugarcane and sugar price determination. During Sugar Advisory Board (SAB) meeting in Nov-2019, Ministry of Industries and Production has constituted a committee to look into the lacuna in sugarcane and sugar price.

Sugar Export

For 2017-18, Sugar sector stood as the third largest export sector of Pakistan. Export revenues from Sugar and Ethanol were \$ 900 mln, only lagging behind Textiles and Rice exports.

For 2018-19, surplus sugar kept sugar retail prices lower bound. PSMA exerted farfetched efforts at the Federal level to get permission for exports of sugar. On Oct 18, 2018, government allowed exports of one (1) mln tonnes of sugar followed by allowing export of another one hundred thousand (0.1mln) tonnes of sugar on Dec 10, 2018. However, an inter-ministerial committee was tasked to review the stock and price situation of sugar on fortnightly basis and, in case of distortion in sugar retail prices, to

recommend the Economic Coordination Committee (ECC) of the Cabinet for reconsideration of sugar exports. Out of 1.1 mln tonnes of sugar allowed to export, only 0.712 mln tonnes of sugar was exported by the end of sugar year 2018-19. No freight support or subsidy was awarded for sugar export except in Punjab. As per ECC of the Cabinet decision dated Dec 04, 2018, support of Rs. 5.35/kg, on a sliding scale, was bestowed by the Punjab government to support the sugar sector in Punjab. Resultantly, domestic sugar prices improved towards the end of the year.

International sugar prices during 2018-19 averaged at \$ 334.39/tonne with no significant fluctuation as sufficient supply was available in the world market (Table -5).

Table -5 International Sugar Prices US \$/ton 2018-19

Month	US \$/Tonnes
October	355.7
November	348.2
December	332.5
January	341.3
February	348
March	324.8
April	334.9
May	330.6
June	328.4
July	324
August	301.6
September	342.7
Average	334.39

Source: <https://www.investing.com/commodities/london-sugar>

Domestic Outlook 2019-20

The initial estimates for 2019-20, obtained from Crop Reporting Departments of Punjab, Sindh and KPK, indicate a 4% decline in sugarcane plantation area, pushing it back to the level of 2011-12 i.e. 1.06 mln hectares.

Punjab is expected to record a 7% and 6% decline in area planted and sugarcane produced, respectively. For Sindh, increase of 3% is expected in area and 6% in sugarcane production (Table-6). In 2018-19, out of 67 mln tonnes production sugar mills utilized 74.3% of sugarcane. In 2019-20, 65 mln tonnes of sugarcane is likely to be available for crushing and depending on mills utilization, the estimated sugar production will still be in excess of 5.2 mln tonnes. With carry forward 1.39 mln tonnes of sugar from 2018-19, total availability of sugar may be around 6.6 mln tonnes.

Table-6

First Estimate of Sugarcane Crop Area and Production 2019-20			
	Area	Production	Yield
Punjab	661,270	42,116,286	63.69
Sindh	287,118	17,669,241	61.54
KP	110,809	5,486,153	49.51
Total	1,059,197	65,271,680	61.62

Source: P.G figures subject to change.

Note: sugarcane production workout on average yield for the last three year.

Global Sugar Scenario

For 2019-20, global sugar production is estimated to decline 3% to 174 mln tonnes. This diminution is attributable to the 5 mln tonnes drop in India's production, resulting from lower area and expected yields. However, Brazil and India are essentially tied as top sugar producer countries. Consumption is expected to keep rising on account of record sugar use in India. Exports are likely to be flat while global stocks are estimated to decrease by 9% to 50 mln tonnes with lower stocks in Pakistan, India, and China.

On account of more sugarcane (2019-20: 36%, 2018-19: 35%) being diverted towards ethanol and less to sugar, a slight decrease in Brazil's sugar production is estimated i.e. 29.4 mln tonnes. Brazil is projected to report decade low level of exports i.e. 18.6 mln tonnes, down 1 mln tonnes from exports in 2018-19. In India, lower area and yield have downgraded production estimate by 15% to 29.3 mln tonnes. However, as a growing economy, consumption is projected at a record 28.5 mln tonnes. Provided the subsidy to cover marketing expenses such as handling, upgrading processing costs, and freight charges, Indian sugar exports are anticipated to reach 5 mln tonnes. Lower-than-expected precipitation in Thailand has decreased sugar production estimate by 7% to 13.5 mln tonnes, backed by lower sugarcane yields and lower sugar extraction rates. Exports are projected at 10.5 mln tonnes.

In closing, I would like to acknowledge the cooperation and sustenance of the Zonal Chairmen, Central and Zonal Executive Committees, all Members, Secretaries and staff of PSMA during the year.

Aslam Faruque

Chairman

Karachi Dec, 18, 2019



Pakistan Sugar Mills Association Annual General Meeting 2019



1st Row (L to R)

Muhammad Ashraf

Tharpara Sugar Mills

Asim Ghani

Al-Abbas Sugar Mills

Iskandar M. Khan

Premier Sugar Mills

Aslam Farruque

Mirpurkhas Sugar Mills

Nauman A. Khan

Thal Industries

Dr. Tara Chand

Sindh Abadigar Sugar Mills

Imran Habib

Habib Sugar Mills

2nd Row (L to R)

Omar Adam

Adam Sugar Mills

Bagir Jaffery

Dewan Sugar Mills

Ahmed Ebrahim

Mehran Sugar Mills

Magsood Malhi

Dehradun Sugar Mills

Ahmed A. Bawany

Faran Sugar Mills

Majeed A. Mubashir

Army Sugar Mills

Innayattullah Khan

Secretary General

M. Yasin Tola

Industrial Analyst

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Abbreviations:

C.Y	:	Calendar year
CRD	:	Crop Reporting Department
DGTO	:	Directorate General Trade Organization
E.S.P	:	Economic Survey of Pakistan
ECC	:	Economic Coordination Committee
F.B.S	:	Federal Bureau of Statistics
F.Y	:	Fiscal year
FBR	:	Federal Board of Revenue
Hect	:	Hectare
KP	:	Khyber Pakhtunkhwa
M.T	:	Metric Tonnes
Mln	:	Million
MOC	:	Ministry of Commerce
MOIP	:	Ministry of Industries & Production
Mol	:	Molasses
N.A	:	Not Applicable
P.G	:	Provincial Government
Pop	:	Population
Prod	:	Production
PSMA	:	Pakistan Sugar Mills Association
Q.P.	:	Quality Premium
Qty	:	Quantity
Rec.	:	Recovery
S.Y	:	Sugar year
SAB	:	Sugar Advisory Board
SBP	:	State Bank of Pakistan
TCP	:	Trading Corporation of Pakistan

Table 1 Sugarcane Plantation Area, Production, Yield and Utilization by Sugar Mills 2005-2019

Year	Area	Production	Yield	Area: Hect
				Prod: Tonnes
				Yield: Tonnes/Hect
				Utilization %
				by mills
Pakistan				
2005-06	906,980	44,292,000	48.80	67.94
2006-07	1,029,000	54,871,000	53.00	73.78
2007-08	1,241,300	63,920,000	51.49	82.60
2008-09	1,029,400	50,045,400	48.60	66.21
2009-10	942,870	49,372,900	52.36	70.09
2010-11	987,700	55,442,100	56.13	80.47
2011-12	1,046,000	58,038,200	55.48	83.13
2012-13	1,128,098	63,718,523	56.48	79.00
2013-14	1,171,687	67,427,975	57.55	84.00
2014-15	1,113,161	62,794,827	56.41	80.90
2015-16	1,130,820	65,450,704	57.88	76.45
2016-17	1,216,894	75,450,620	62.00	94.00
2017-18	1,340,926	83,289,340	62.11	78.81
2018-19	1,101,073	67,129,645	60.97	74.13
Punjab				
2005-06	625,200	28,949,000	46.30	66.81
2006-07	712,000	37,542,000	53.00	70.85
2007-08	872,200	40,306,000	48.73	81.90
2008-09	666,500	32,294,700	48.50	64.02
2009-10	607,420	31,324,000	51.60	66.95
2010-11	672,200	37,481,000	55.75	74.37
2011-12	761,200	42,893,000	56.34	75.07
2012-13	767,670	42,982,070	56.00	74.50
2013-14	756,750	43,704,000	57.75	78.00
2014-15	683,934	41,074,000	60.06	72.50
2015-16	705,350	41,968,200	59.50	68.00
2016-17	777,821	49,613,000	63.78	89.00
2017-18	859,130	55,067,490	64.10	71.73
2018-19	710,610	44,906,310	63.19	67.05

Source: Provincial Governments (CRD).

Area: Hect
 Prod: Tonnes
 Yield: Tonnes/Hect
**Utilization %
 by mills**

Sindh

Year	Area	Production	Yield	Utilization % by mills
2005-06	183,180	11,243,000	61.40	81.67
2006-07	215,000	12,529,000	58.00	92.80
2007-08	308,800	18,793,900	60.86	89.05
2008-09	263,900	13,304,300	50.40	76.28
2009-10	233,950	13,505,400	57.70	85.04
2010-11	226,500	13,900,000	60.43	97.84
2011-12	245,000	14,455,000	59.00	92.02
2012-13	253,694	15,966,224	63.00	92.40
2013-14	297,558	18,362,575	61.71	102.48
2014-15	316,749	16,613,835	52.45	104.16
2015-16	312,815	17,984,260	57.49	99.00
2016-17	320,501	20,208,895	63.05	*108.00?
2017-18	333,262	20,611,878	61.85	104.92
2018-19	279,472	16,691,323	59.72	95.44

Khyber Pakhtunkhwa

2005-06	98,600	4,100,000	41.60	38.23
2006-07	102,000	4,800,000	47.00	46.98
2007-08	104,800	4,792,000	45.73	62.11
2008-09	98,200	4,408,500	44.90	52.48
2009-10	100,800	4,507,900	44.70	47.77
2010-11	88,400	4,030,300	45.59	75.31
2011-12	94,400	4,325,500	45.82	69.47
2012-13	106,734	4,770,229	44.70	70.41
2013-14	117,379	5,361,400	45.68	67.00
2014-15	112,478	5,106,992	45.40	71.83
2015-16	112,655	5,498,244	48.81	67.02
2016-17	118,572	5,628,725	47.47	86.00
2017-18	148,534	7,609,972	51.23	59.32
2018-19	110,991	5,532,012	49.84	67.35

* Variation in Sindh is due to some unreported data on border.

Source: Provincial Governments (CRD).

Year	Area	Production	Yield	Area: Hect
				Prod: Tonnes
				Yield: Tonnes/Hect
				Utilization %
				by mills
2005-06	N.A	N.A	N.A	-
2006-07	N.A	N.A	N.A	-
2007-08	500	28,100	56.2	-
2008-09	800	37,900	47.4	-
2009-10	700	35,600	50.9	-
2010-11	600	30,800	51.00	-
2011-12	700	31,400	44.85	-
2012-13	700	31,000	45.00	-
2013-14	700	31,000	45.00	-
2014-15	N.A	N.A	N.A	-
2015-16	N.A	N.A	N.A	-
2016-17	N.A	N.A	N.A	-
2017-18	N.A	N.A	N.A	-
2018-19	N.A	N.A	N.A	-

Source: Provincial Governments (CRD).

Table 2 Sugarcane Crushing, Sugar Production and Recovery 2005-2019

Pakistan				
				Cane Qty: Tonnes Sugar Qty: Tonnes Rec: Percent
Year	Mills	Cane Crushed	Sugar Made	Recovery
2005-06	74	30,090,632	2,588,177	8.60
2006-07	77	40,483,977	3,516,218	8.69
2007-08	78	52,776,922	4,740,913	8.98
2008-09	82	33,139,418	3,134,145	9.46
2009-10	83	34,611,003	3,133,494	9.05
2010-11	84	44,526,719	4,172,729	9.37
2011-12	86	48,248,535	4,670,380	9.64
2012-13	86	50,089,483	5,030,129	10.04
2013-14	88	56,460,524	5,587,568	9.90
2014-15	89	50,795,218	5,139,566	10.12
2015-16	89	50,042,249	5,082,110	10.16
2016-17	90	70,989,948	7,005,480	9.87
2017-18	89	65,639,963	6,580,111	10.02
2018-19	89	49,768,113	5,210,744	10.47

Punjab

2005-06	40	19,340,641	1,566,047	8.10
2006-07	41	26,601,603	2,268,174	8.53
2007-08	42	33,063,564	2,952,784	8.93
2008-09	45	20,677,089	1,963,957	9.50
2009-10	45	20,972,969	1,858,161	8.86
2010-11	44	27,890,459	2,598,085	9.32
2011-12	44	32,203,007	3,116,348	9.68
2012-13	44	31,980,732	3,172,408	9.92
2013-14	44	34,054,518	3,352,795	9.85
2014-15	45	29,776,144	2,967,266	9.97
2015-16	45	28,552,068	2,837,761	9.94
2016-17	45	44,143,322	4,314,227	9.77
2017-18	45	39,500,168	3,869,003	9.79
2018-19	45	30,111,468	3,103,595	10.31

Source: PSMA Zonal Offices/P.G

05 Non members in Sindh

01 Non member in KP

Cane Qty: Tonnes
 Sugar Qty: Tonnes
 Rec: Percent

Sindh

Year	Mills	Cane Crushed	Sugar Made	Recovery
2005-06	28	9,182,553	902,907	9.83
2006-07	29	11,626,978	1,062,411	9.14
2007-08	29	16,737,003	1,561,378	9.33
2008-09	30	10,148,603	976,420	9.62
2009-10	31	11,484,422	1,095,104	9.54
2010-11	33	13,600,800	1,298,989	9.55
2011-12	34	13,040,210	1,267,050	9.72
2012-13	34	14,750,048	1,547,547	10.49
2013-14	37	18,818,581	1,920,819	10.21
2014-15	37	17,304,763	1,822,900	10.53
2015-16	38	17,821,668	1,898,191	10.65
2016-17	38	21,997,817	2,233,925	10.16
2017-18	38	21,625,828	2,281,453	10.55
2018-19	38	15,930,655	1,719,302	10.79

Khyber Pakhtunkhwa

2005-06	6	1,567,438	119,223	7.69
2006-07	7	2,255,395	185,634	8.23
2007-08	7	2,976,356	226,751	7.62
2008-09	7	2,313,725	193,768	8.37
2009-10	7	2,153,612	180,229	8.37
2010-11	7	3,035,460	275,655	9.08
2011-12	7	3,005,318	286,982	9.55
2012-13	7	3,358,702	310,174	9.23
2013-14	7	3,587,425	313,954	8.75
2014-15	7	3,714,311	349,400	9.41
2015-16	7	3,668,513	346,158	9.44
2016-17	6	4,848,809	457,327	9.43
2017-18	6	4,513,966	429,655	9.52
2018-19	6	3,725,991	387,848	10.41

Source: PSMA Zonal Offices/P.G

05 Non members in Sindh

01 Non member in KP

Table 3 **Beet Sugar Position KP Sugar Mills**
2005-19

Year	Mills	Beet Sliced	Sugar made	Rec.	Qty: Tonnes	
					Rec: Percent	Molasses
2005-06	3	93,518	8,934	9.55		3,404
2006-07	1	83,580	7,865	9.04		2,973
2007-08	1	64,095	5,532	8.80		2,576
2008-09	1	9,301	947	10.55		419
2009-10	2	53,336	4,641	9.15		2,140
2010-11	2	151,265	13,535	8.95		7,027
2011-12	2	176,709	18,216	10.31		8,392
2012-13	2	306,341	33,028	10.78		12,040
2013-14	1	251,418	27,389	10.89		8,548
2014-15	1	216,243	22,727	10.51		9,731
2015-16	1	307,366	32,791	10.67		13,831
2016-17	1	400,538	42,996	10.73		18,024
2017-18	1	385,995	40,922	10.60		17,370
2018-19	1	523,199	56,828	10.86		23,544

Table 4 **Consolidated Sugar Production in Pakistan**
2005-19

Year	Cane Sugar	Beet Sugar	Raw Sugar	Qty: Tonnes	
				Total	
2005-06	2,588,177	8,934	401,396	2,988,507	
2006-07	3,516,218	7,865	2,860	3,526,943	
2007-08	4,740,913	5,532	5,929	4,752,374	
2008-09	3,134,145	947	-	3,135,092	
2009-10	3,133,494	4,641	-	3,138,135	
2010-11	4,119,418	13,535	39,679	4,172,726	
2011-12	4,652,164	18,216	-	4,670,380	
2012-13	5,030,129		33,028	5,063,158	
2013-14	5,587,568	27,389	-	5,614,957	
2014-15	5,139,566	22,727	-	5,162,293	
2015-16	5,082,110	32,791	-	5,114,901	
2016-17	7,005,480	42,996	-	7,048,476	
2017-18	6,580,111	40,922	-	6,621,033	
2018-19	5,210,744	56,828	-	5,267,572	

Source: PSMA Zonal Offices/P.G

Table 5 **Molasses Production in Pakistan from Cane, Raw* & Beet 2005-19**

Year	Punjab	Sindh	K.P	Qty: Tonnes Pakistan
2005-06	937,337	458,050	42,568	1,437,954
2006-07	1,222,482	578,833	109,787	1,911,102
2007-08	1,607,042	889,566	167,172	2,663,708
2008-09	928,514	493,079	114,739	1,536,332
2009-10	927,056	529,370	101,131	1,557,457
2010-11	1,249,324	643,651	141,580	2,034,555
2011-12	1,445,830	624,956	153,583	2,224,369
2012-13	1,422,807	663,305	166,639	2,252,751
2013-14	1,495,781	854,225	174,196	2,524,202
2014-15	1,281,768	781,665	183,702	2,247,137
2015-16	1,279,715	787,910	178,914	2,246,540
2016-17	1,877,383	982,451	218,128	3,077,962
2017-18	1,777,508	973,986	203,128	2,953,798
2018-19	1,355,016	716,879	167,670	2,239,565

Molasses figures estimated

Table 6 (1) **Sugarcane Indicative Price Mill-Gate Delivery (Per 40 Kg)**

Year	Punjab	Sindh	K.P	Q.P
2005-06	45	60	45	0.5
2006-07	60	67	65	0.5
2007-08	60	67	65	0.5
2008-09	80	81	80	0.5
2009-10	100	102	100	0.5
2010-11	125	127	125	0.5
2011-12	150	154	150	0.5
2012-13	170	172	170	0.5
2013-14	170	172	170	0.5
2014-15	180	182	180	0.5
2015-16	180	172	180	0.5
2016-17	180	182	180	0.5
2017-18	180	182	180	0.5
2018-19	180	182	180	0.5
2019-20	190	192	190	0.5

Source: P.G

Table 6(2) Sugarcane Indicative Price per 40 kg in Comparison with Season's Avg. Retail Price per kg 2008-2019

Year	Punjab	Sindh	K.P	Season Avg retail/kg
2008-09	80	81	80	38.72
2009-10	100	102	100	57.11
2010-11	125	127	125	72.72
2011-12	150	154	150	60.99
2012-13	170	172	170	53.25
2013-14	170	172	170	53.82
2014-15	180	182	180	57.14
2015-16	180	172	180	62.60
2016-17	180	182	180	64.94
2017-18	180	182	180	53.70
2018-19	180	182	180	57.55
2019-20	190	192	190	-

Sugarcane indicative price (Rs. per 40 Kg), Retail price (season's Average/kg)

Source: P.G, E.S.P

* 2018-19: (July-Apr)

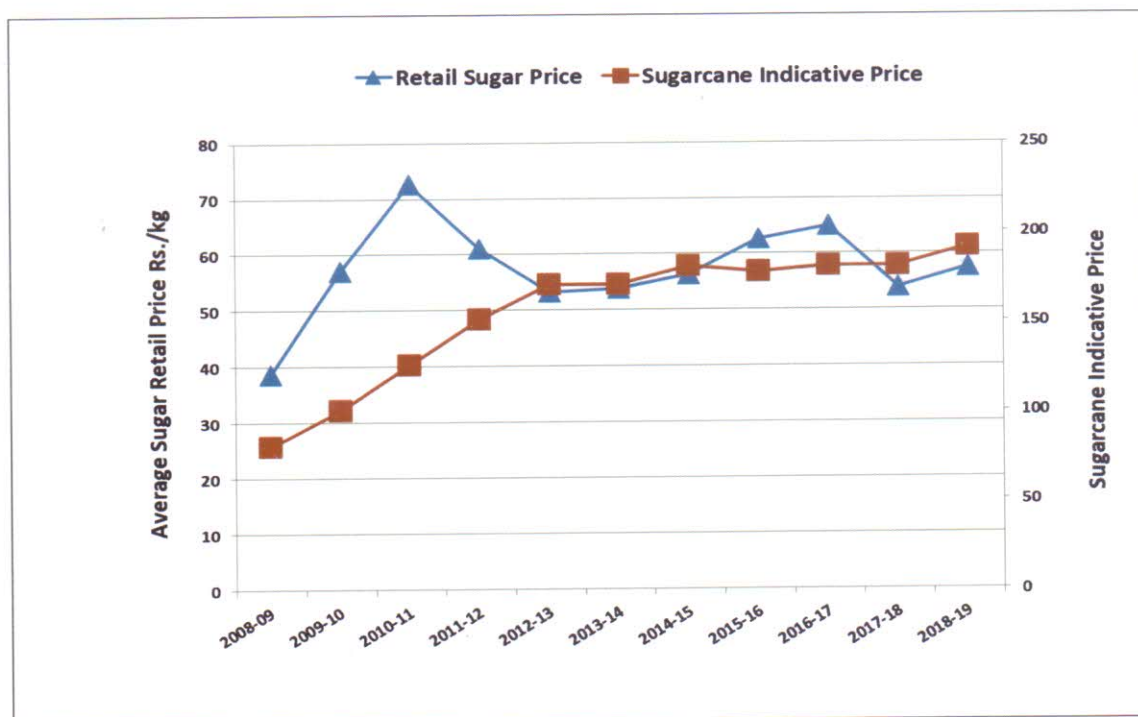
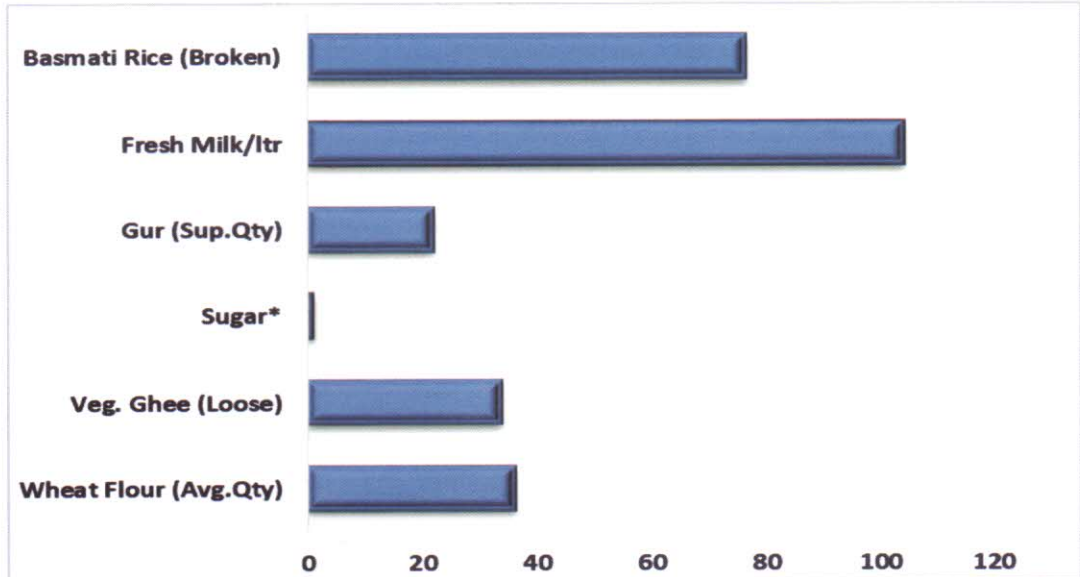


Table 7 Retail Prices of Essential Commodities versus sugar 2008-2019

Years	Wheat Flour (Avg.Qty)	Veg. Ghee (Loose)	Sugar*	Gur (Sup.Qty)	Fresh Milk/ltr	Basmati Rice (Broken)
2009-10	28.77	116.04	57.11	70.74	42.32	43.92
2010-11	29.56	150.31	72.72	83.86	50.10	50.32
2011-12	30.26	166.26	60.99	78.27	58.17	60.36
2012-13	34.53	160.73	53.25	74.50	65.24	69.01
2013-14	40.98	160.57	53.82	82.83	69.86	74.09
2014-15	39.58	153.91	56.37	82.96	76.00	73.01
2015-16	38.58	138.35	62.60	89.28	78.24	63.00
2016-17	38.00	143.34	64.94	88.20	80.59	63.90
2017-18	37.45	146.22	53.70	81.49	82.75	72.07
2018-19	39.14	155.04	57.55	86.14	86.35	77.45
% age ±	36.04	33.61	0.77	21.77	104.04	76.34

* 2018-19(July-Apr, E.S.P)

Graph showing Percentage of Price Increase
(2008-2019)



Source: E.S.P (Fiscal Year)

* 2018-19(July-Apr, open market)

**Table 8 (1) Mill wise Sugar Position Punjab
Season 2018-19**

Qty: Tonnes

	PUNJAB	Nos. of days	CANE CRUSHED	PROD. TONNES	Rec. %	MOLASSES PROD.	Rec %
1	ABDULLAH (Depalpur)		171,562	16,680	9.7	7,720	4.50
2	AL-ARABIA (Abdullah- II) (Shahpur)		668,962	68,545	10.2	30,103	4.50
3	ADAM*		363,306	32,402	8.9	16,349	4.50
4	ASHRAF		859,389	87,879	10.2	38,673	4.50
5	AL-MOIZ-II		611,070	62,055	10.2	27,498	4.50
6	BABA FARID*		26,976	994	3.7	1,214	4.50
7	BROTHERS						
8	CHANAR		381,801	35,320	9.3	17,181	4.50
9	CHAUDHRY						
10	SW (CHISHTIA)		416,724	39,810	9.6	18,753	4.50
11	Imperial (COLONY- I)						
12	JK (COLONY- II)		752,409	70,815	9.4	33,858	4.50
13	DARYA KHAN (FECTO)		259,113	26,603	10.3	11,660	4.50
14	ETIHAD		1,619,284	183,332	11.3	72,868	4.50
15	FATIMA		997,082	107,116	10.7	44,869	4.50
16	HAMZA		2,133,725	231,006	10.8	96,018	4.50
17	HAQ BAHU		294,838	29,670	10.1	13,268	4.50
18	Haseeb WAQAS						
19	HUDA (Fauji)		362,203	35,775	9.9	16,299	4.50
20	HUNZA (I)		722,161	68,415	9.5	32,497	4.50
21	HUNZA (II)		564,785	54,680	9.7	25,415	4.50
22	HUSEIN		491,278	48,251	9.8	22,108	4.50
23	INDUS		937,805	102,522	10.9	42,201	4.50
24	ITTEFAQ						
25	J.D.W-I		2,475,196	287,394	11.6	111,384	4.50
26	J.D.W-II		1,669,315	190,304	11.4	75,119	4.50
27	JAUHARABAD		431,121	44,776	10.4	19,400	4.50
28	Two Star (KAMALIA)		1,356,644	131,553	9.7	61,049	4.50
29	KASHMIR		411,811	37,824	9.2	18,531	4.50
30	LAYYAH		1,258,458	130,627	10.4	56,631	4.50
31	MACCA		37,535	3,389	9.0	1,689	4.50

32	MADINA		1,184,524	112,610	9.5	53,304	4.50
33	NOON		630,929	63,098	10.0	28,392	4.50
34	POPULAR (National)		443,872	44,508	10.0	19,974	4.50
35	PATTOKI		73,898	6,033	8.2	3,325	4.50
36	RAMZAN		821,787	78,348	9.5	36,980	4.50
37	R.Y.K		1,405,844	155,186	11.0	63,263	4.50
38	RASOOL NAWAZ		226,412	22,346	9.9	10,189	4.50
39	SAFINA (Ph-Wali)		748,434	73,779	9.9	33,680	4.50
40	SHAHTAJ		750,786	74,585	9.9	33,785	4.50
41	SHAKARGANJ -(I)		226,738	22,357	9.9	10,203	4.50
42	SHAKARGANJ -(II)		258,024	26,659	10.3	11,611	4.50
43	SHEIKHOO		1,425,138	146,505	10.3	64,131	4.50
44	TANDLIANWALA-(I)		770,884	69,115	9.0	34,690	4.50
45	TANDLIANWALA-(II)		869,643	80,731	9.3	39,134	4.50
TOTAL 2018-2019 (A)			30,111,468	3,103,595	10.31	1,355,016	4.50
TOTAL 2017-2018 (a)			39,500,168	3,869,003	9.79	1,777,508	4.50

Table 8 (2)

**Mill wise Sugar Position K.P
Season 2018-19**

Qty: Tonnes

Khyber Pakhtunkhwa		Nos. of days	CANE CRUSHED	PROD. TONNES	Rec. %	MOLASSES PROD.	Rec %
1	AL-MOIZ		806,490	86,776	10.8	36,292	4.50
2	CHASHMA -I		960,850	103,272	10.7	43,238	4.50
3	CHASHMA -II		601,563	62,980	10.5	27,070	4.50
4	KHAZANA		135,712	12,975	9.6	6,107	4.50
5	PREMIER		154,414	16,317	10.6	6,949	4.50
6	TANDLIANWALA(ZAMAND)		1,066,961	105,529	9.9	48,013	4.50
Non Members							
7	BANNU		-	-	-	-	-
TOTAL 2018-2019 (B)			3,725,990.61	387,848.25	10.41	167,669.58	4.50
TOTAL 2017-2018 (b)			4,513,966	429,655	9.52	203,128	4.50

* Molasses figures estimated

Table 8 (3)

**Mill wise Sugar Position Sindh
Season 2018-19**

Qty: Tonnes

	Sindh	Nos. of days	CANE CRUSHED	PROD. TONNES	Rec. %	MOLASSES PROD.	Rec %
1	AL-ABBAS		467,829	50,892	10.9	21,052	4.50
2	Abdullah Shah Ghazi(Al-Asif)		24,778	1,755	7.1	1,115	4.50
3	AL-NOOR		894,494	94,825	10.6	40,252	4.50
4	ALLIANCE		1,179,316	127,810	10.8	53,069	4.50
5	ANSARI		74,166	7,260	9.8	3,337	4.50
6	ARMY WELFARE		292,113	31,895	10.9	13,145	4.50
7	BAWANY						
8	CHAMBER		41,553	4,258	10.2	1,870	4.50
9	DEHARKI		1,316,226	147,213	11.2	59,230	4.50
10	DEWAN		333,105	35,485	10.7	14,990	4.50
11	DIGRI		229,405	23,103	10.1	10,323	4.50
12	FARAN		670,581	73,696	11.0	30,176	4.50
13	J.D.W-III (GHOTKI)		1,526,984	162,580	10.6	68,714	4.50
14	HABIB		771,864	83,910	10.9	34,734	4.50
15	KHAIRPUR		663,365	68,714	10.4	29,851	4.50
16	KHOSKI		18,799	1,600	8.5	846	4.50
17	KIRAN		331,768	30,818	9.3	14,930	4.50
18	LARR		65,590	6,862	10.5	2,952	4.50
19	MATIARI		509,624	54,947	10.8	22,933	4.50
20	MEHRAN		702,259	80,331	11.4	31,602	4.50
21	MIRPURKHAS		577,396	64,935	11.2	25,983	4.50
22	MIRZA						
23	NAJMA						
24	NAUDERO		92,172	9,680	10.5	4,148	4.50
25	NEW DADU		124,501	12,200	9.8	5,603	4.50
26	PANGRIO						
27	RANIPUR		268,835	25,137	9.4	12,098	4.50
28	SAKRAND		335,136	36,865	11.0	15,081	4.50
29	SANGHAR		490,932	52,799	10.8	22,092	4.50
30	SERI						

31	SHAHMURAD		500,270	55,425	11.1	22,512	4.50
32	SINDH ABADGAR'S		431,457	46,634	10.8	19,416	4.50
33	TANDO M. KHAN						
34	BANDI		255,172	25,540	10.0	11,483	4.50
35	S.G.M		666,793	72,797	10.9	30,006	4.50
36	THARPARKAR		416,815	39,593	9.5	18,757	4.50
37	TANDO ALLAHYAR		70,650	7,669	10.9	3,179	4.50
38	AKT (Golf)		1,586,707	182,076	11.5	71,402	4.50
TOTAL 2018-2019 (C)			15,930,655	1,719,302	10.79	716,879	4.50
TOTAL 2017-2018 (c)			21,625,829	2,281,453	10.55	973,162	4.50

* Estimated

Source: PSMA Zonal Offices/P.G

**Table 8 (4) Mill wise Sugar Position from Beet
Season 2018-19**

Qty: Tonnes

Khyber Pakhtunkhwa		Nos. of days	BEET SCLICED	PROD. TONNES	REC. %	MOLASSES PROD.	Rec %
1	AL-MOIZ		523,199	56,828	10.86	23,544	4.50
2	PREMIER						
TOTAL 2018-2019 (C)			523,199	56,828	10.86	23,544	4.50
TOTAL 2017-2018 (c)			385,995	40,922	10.60	17,370	4.50

**Table 8 (5) Total Sugar Production
Summary 2018-19**

	Cane Crushed	Raw Utilized	Beet Sliced	Sugar Prod.			Total Sugar	Mol. C+R+B*
				(Cane)	(Raw)	(Beet)		
Punjab	30,111,468	-	-	3,103,595	-	-	3,103,595	1,355,016
Sindh	15,930,655	-	-	1,719,302	-	-	1,719,302	716,879
K.P	3,725,991	-	523,199	387,848	-	56,828	444,676	191,214
Total 2018-19	49,768,113	-	523,199	5,210,744	-	56,828	5,267,572	2,263,109
Total 2017-18	65,639,963		385,995	6,580,111		40,922	6,621,033	2,971,168

* Estimated

Source: PSMA Zonal Offices/P.G

Table 9 (1)

Estimated Gur Equivalent Production
From Sugarcane Not Milled After Deduction
for Seed, Fodder and Wastage Etc.

	Qty: Tonnes
1993-94	653,400
1994-95	827,100
1995-96	875,000
1996-97	709,400
1997-98	346,485
1998-99	332,990
1999-00	511,470
2000-01	649,623
2001-02	354,341
2002-03	208,672
2003-04	175,833
2004-05	416,611
2005-06	642,393
2006-07	523,292
2007-08	132,182
2008-09	789,930
2009-10	625,256
2010-11	169,150
2012-13	270,000
2013-14	390,000
2014-15	342,000
2015-16	395,000
2016-17	218,806
2017-18	200,000
2018-19	250,000

Note: Gur equivalent is based on 8.5% recovery.
These are not actual Gur production figures.
(Recovery rate of Gur is 13.5-14.5%)

Table 9 (2)

**Sweetener Consumption in Pakistan
Sugar plus Gur Equivalent**

Qty: Mln. Metric Tonne

Sugar Year	Population Millions	Sugar Consumption		Gur Equivalent	Total Sweetener	Sweetener kg / capita
		Year's	Kg Per Capita			
2005-06	153.45	3.846	25.06	0.642	4.488	29.24
2006-07	162.91	3.958	24.29	0.523	4.481	27.50
2007-08	166.41	4.297	25.82	0.132	4.429	26.16
2008-09	169.94	3.628	21.34	0.789	4.410	25.95
2009-10	173.51	4.186	24.12	0.625	4.810	27.72
2010-11	177.10	4.096	23.12	0.169	4.265	24.08
2011-12	180.71	4.385	24.27	0.240	4.625	25.59
2012-13	184.35	4.420	24.60	0.270	4.690	25.44
2013-14	188.02	4.512	24.00	0.390	4.902	26.07
2014-15	191.71	4.600	24.00	0.342	4.942	25.78
2015-16	195.40	4.904	25.10	0.395	5.299	25.12
2016-17	199.1	5.100	25.65	0.219	5.310	26.80
2017-18	207.77	5.200	25.10	0.200	5.400	26.00
2018-19	212.82	5.196	24.42	0.250	5.446	25.60

Source: - Pop: Economic Survey 2018-19

Sweetener: - Sugar + Gur

**Pakistan Sugar Mills Association Sweetener
Consumption kg/capita in Pakistan**

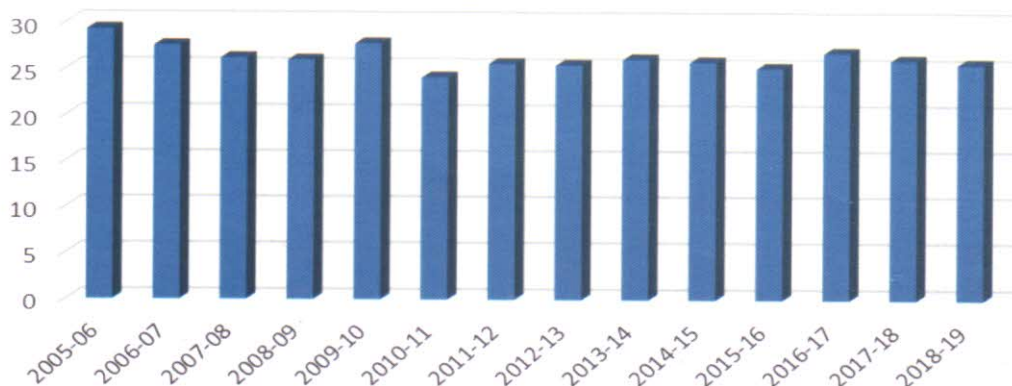


Table 10 **Import of Refined Sugar**
2005-2019

*Year	Quantity	Value	Avg. Price
2005-06	1,527,322	37,365,929	24,465
2006-07	586,543	15,721,704	26,804
2007-08	36,692	912,073	24,858
2008-09	125,743	4,505,407	35,830
2009-10	370,000	14,811,000	40,029
2010-11	1,031,919	58,669,007	56,854
2011-12	17,221	1,166,825	67,756
2012-13	7,308	500,644	68,506
2013-14	9,824	635,370	64,675
2014-15	10,056	631,427	62,791
2015-16	535	28,517	53,303
2016-17	8,923	535,447	53,960
2017-18	8,713	553,682	63,547
2018-19	7,852	534,475	68,069

Table 10 (A) **Import of Raw Sugar**
2005-2019

*Year	Quantity	Value	Avg. Price
2005-06	472,039	7,794,642	16,512
2006-07	11,033	N.A	-
2007-08	714	N.A	-
2008-09	-	-	-
2009-10	-	-	-
2010-11	-	-	-
2011-12	-	-	-
2012-13	-	-	-
2013-14	-	-	-
2014-15	-	-	-
2015-16	-	-	-
2016-17	-	-	-
2017-18	-	-	-
2018-19	-	-	-

Source: PBS (July-June)

Table 11
Export of Sugar
2005-2019

*Year	Quantity	Value	Avg. Price	
			Qty: MT	Value: '000' Rs.
2005-06	61,047	1,590,555		26,055
2006-07	12	330		27,500
2007-08	260,840	5,738,856		22,015
2008-09	23,980	639,677		26,675
2009-10	-	-		-
2010-11	-	-		-
2011-12	48,672	2,575,403		52,913
2012-13	1,064,215	51,692,066		48,573
2013-14	647,333	29,638,230		45,785
2014-15	708,356	32,685,502		46,143
2015-16	293,541	13,817,628		47,072
2016-17	307,348	16,867,358		54,880
2017-18	1,469,802	56,379,067		38,358
2018-19	691,994	31,147,250		45,011

Table 12
Export of Molasses
2005-2019

*Year	Quantity	Value	Avg. Price
2005-06	497,161	2,612,342	5,255.00
2006-07	373,177	1,704,034	4,566.00
2007-08	780,807	3,490,864	4,471.00
2008-09	936,338	7,486,584	7,996.00
2009-10	961,300	7,784,000	8,097.36
2010-11	86,437	892,087	10,321.00
2011-12	55,608	577,981	10,394.00
2012-13	225,221	2,747,341	12,198.00
2013-14	197,342	2,510,421	12,721.00
2014-15	83,229	1,010,347	12,139.00
2015-16	73,067	874,398	11,967.00
2016-17	101,410	1,217,122	12,001.00
2017-18	168,962	2,114,533	12,515.00
2018-19	117,909	1,698,719	14,407.00

Source: PBS (July-June)

Table 13

Export of un-denature Ethyl Alcohol

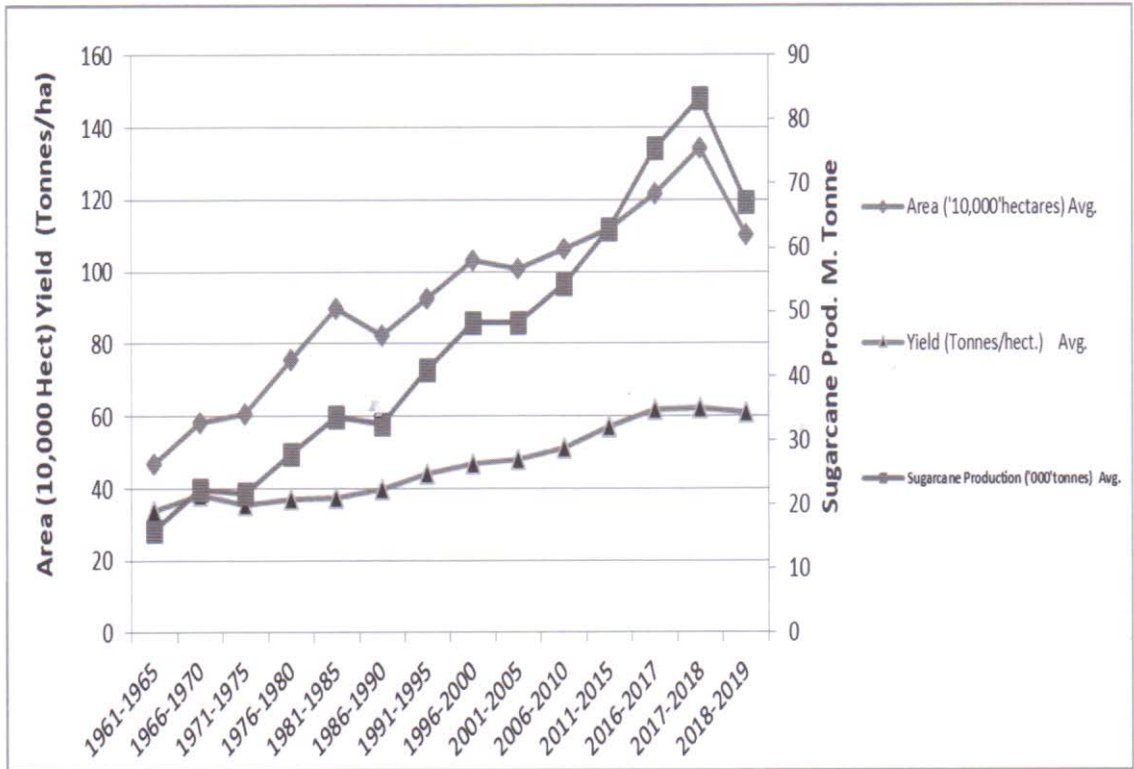
Qty: Liters
 Value: '000' Rs.
 Avg. Price: Rs./Liter

*Year	Quantity	Value	Avg. Price
2005-06	33,789,535	1,066,048	32.00
2006-07	34,116,438	1,122,000	32.00
2007-08	28,609,832	892,222	31.19
2008-09	27,045,396	1,209,025	44.70
2009-10	101,260,099	4,679,269	46.21
2010-11	168,509,200	9,506,883	56.00
2011-12	215,814,894	14,234,428	65.96
2012-13	142,065,426	8,735,649	61.49
2013-14	492,476,805	32,168,695	65.21
2014-15	421,881,994	25,749,257	61.00
2015-16	396,940,741	22,929,248	58.00
2016-17	358,483,301	29,330,083	82.00
2017-18	699,791,482	42,512,352	61.00
2018-19	781,089,024	56,688,388	73.00

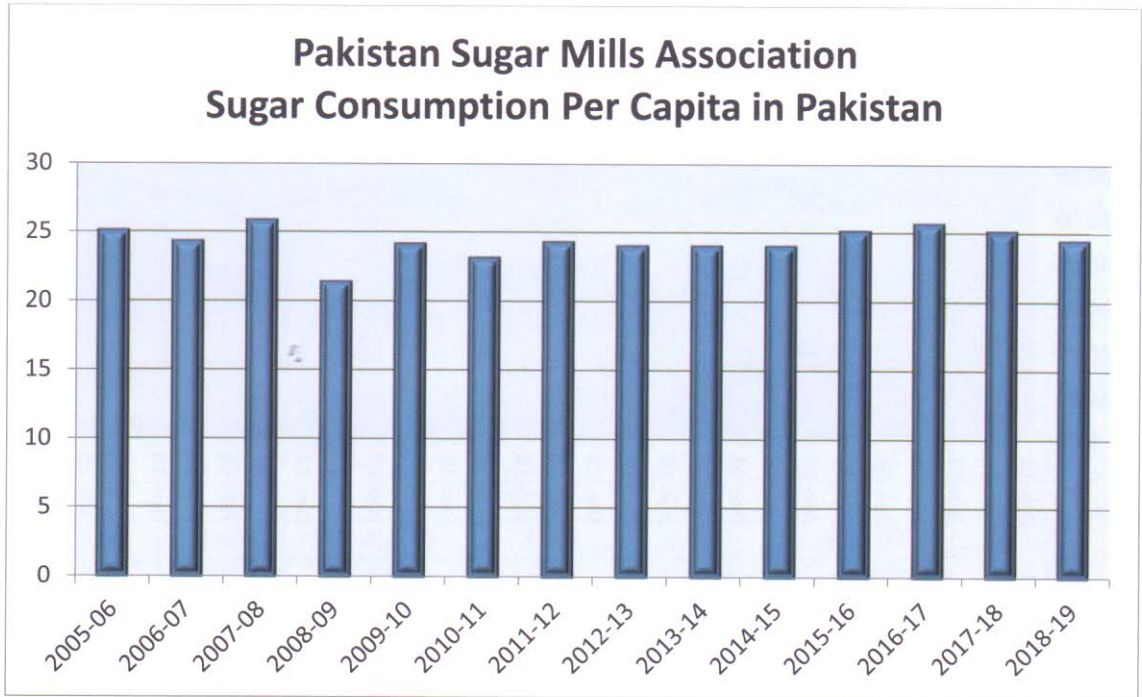
Source: PBS (July- June)

Pakistan Sugar Mills Association			
Avg. Sugarcane Area, Production and Yield Tonnes/ha			
Projected 1961- 2019			
Years	Area (‘000’hectares) Avg.	Sugarcane Production (‘000’tonnes) Avg.	Yield (Tonnes/ha) Avg.
1961-1965	469	15,849	33.79
1966-1970	582	22,312	38.34
1971-1975	608	21,647	35.60
1976-1980	757	27,994	36.98
1981-1985	897	33,580	37.44
1986-1990	823	32,656	39.68
1991-1995	927	40,902	44.12
1996-2000	1,030	48,371	46.96
2001-2005	1,009	48,343	47.91
2006-2010	1,063	54,365	51.10
2011-2015	1,118	62,975	57.27
2016-2017	1,217	75,451	62.00
2017-2018	1,341	83,289	62.11
2018-2019	1,101	67,129	60.97

Source: PG(CRD)

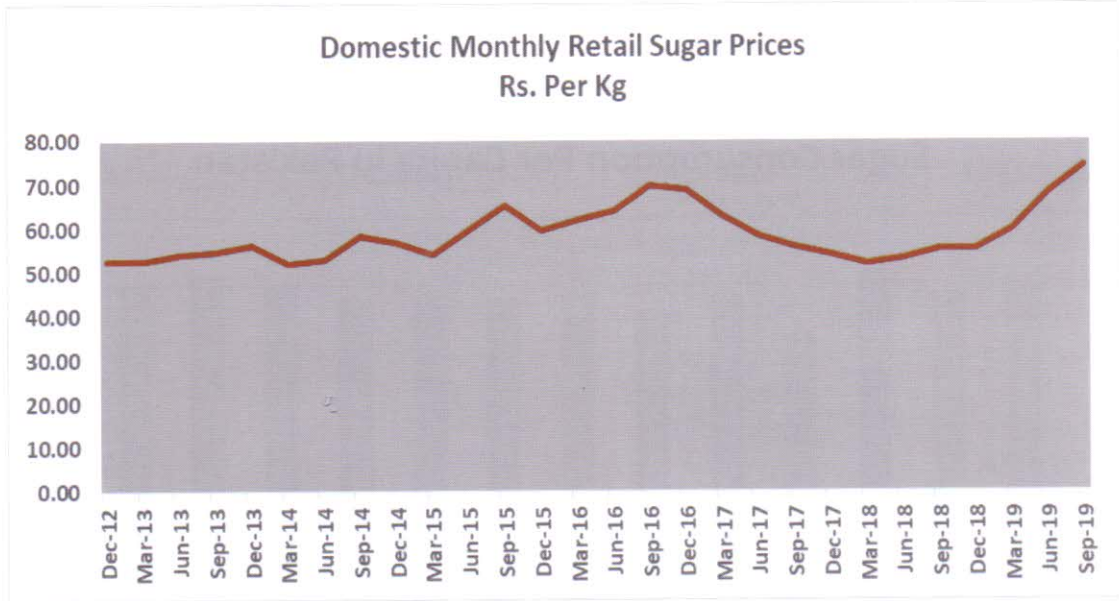


Source: CRD



Sugar Year	Sugar per capita
2005-06	25.06
2006-07	24.29
2007-08	25.82
2008-09	21.34
2009-10	24.12
2010-11	23.12
2011-12	24.27
2012-13	24.00
2013-14	24.00
2014-15	24.00
2015-16	25.10
2016-17	25.65
2017-18	25.10
2018-19	24.42

Source: SAB 2018-19



Months	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
Oct	50.53	55.68	59.17	61.55	71.04	54.28	54.78
Nov	54.07	58.86	56.78	59.56	71.80	53.68	54.87
Dec	53.04	54.12	54.12	57.14	63.68	53.91	55.63
Jan	52.52	51.39	53.92	59.80	64.86	53.12	58.47
Feb	51.83	51.25	54.23	62.80	63.12	51.50	59.14
Mar	52.89	53.35	54.28	62.93	60.41	51.33	61.15
Apr	53.79	52.60	56.92	63.76	59.97	52.85	65.63
May	53.66	52.27	59.53	63.75	58.46	52.68	67.99
Jun	54.50	53.84	62.49	64.37	56.48	53.69	70.83
Jul	54.90	55.92	65.41	67.34	55.04	55.21	72.38
Aug	54.68	57.83	65.36	71.17	56.88	55.59	75.38
Sep	54.50	60.49	64.75	71.03	55.45	54.99	75.02
Year Average Retail Rs.	53.41	54.8	58.91	63.76	61.43	53.57	64.27

Source: PBS

10 Largest			
10 LARGEST SUGAR PRODUCERS		10 LARGEST SUGAR CONSUMERS	
<i>(in mln metric tonnes, tel quel)</i>			
1	India	33.30	1 India 25.39
2	Brazil	29.29	2 EU-28 17.94
3	EU-28	18.18	3 China 16.10
4	Thailand	15.44	4 Brazil 10.47
5	China	10.71	5 USA 10.19
6	USA	7.83	6 Indonesia 6.89
7	Pakistan	6.28	7 Russian Fed. 5.82
8	Russian Fed.	6.18	8 Pakistan 5.25
9	Mexico	5.92	9 Mexico 4.27
10	Australia	4.64	10 Egypt, Arab R. 3.30
10 LARGEST CANE SUGAR PRODUCER		10 LARGEST BEET SUGAR PRODUCERS	
<i>(in mln metric tonnes, tel quel)</i>			
1	India	33.30	1 EU- 28 17.98
2	Brazil	29.29	2 Russian Fed. 6.18
3	Thailand	15.44	3 USA 4.43
4	China	9.20	4 Turkey 2.47
5	Pakistan	6.25	5 Ukraine 1.75
6	Mexico	5.92	6 China 1.51
7	Australia	4.64	7 Egypt, Arab R. 1.25
8	USA	3.40	8 Iran 1.04
9	Guatemala	2.69	9 Japan 0.64
10	Colombia	2.33	10 Belarus 0.64

Source: - ISO Sugar Year Book 2019 data 2018

10 Largest

10 LARGEST NET-EXPORTERS (in mln metric tonnes, tel quel)

<i>TOTAL</i>			<i>RAW SUGAR</i>			<i>WHITE SUGAR</i>		
1	Brazil	21.26	1	Brazil	18.17	1	Thailand	4.53
2	Thailand	11.04	2	Thailand	6.51	2	Brazil	3.08
3	Australia	3.09	3	Australia	2.98	3	EU-28	2.78
4	Guatemala	1.63	4	Mexico	1.45	4	India	2.46
5	EU- 28	1.61	5	Guatemala	0.79	5	Pakistan	1.15
6	Mexico	1.58	6	South Africa	0.68	6	Guatemala	0.84
7	Pakistan	1.15	7	Cuba	0.49	7	UAE	0.83
8	India	0.88	8	El Salvador	0.40	8	Algeria	0.59
9	Colombia	0.64	9	Nicaragua	0.30	9	Ukraine	0.58
10	Ukraine	0.58	10	Colombia	0.27	10	Morocco	0.37

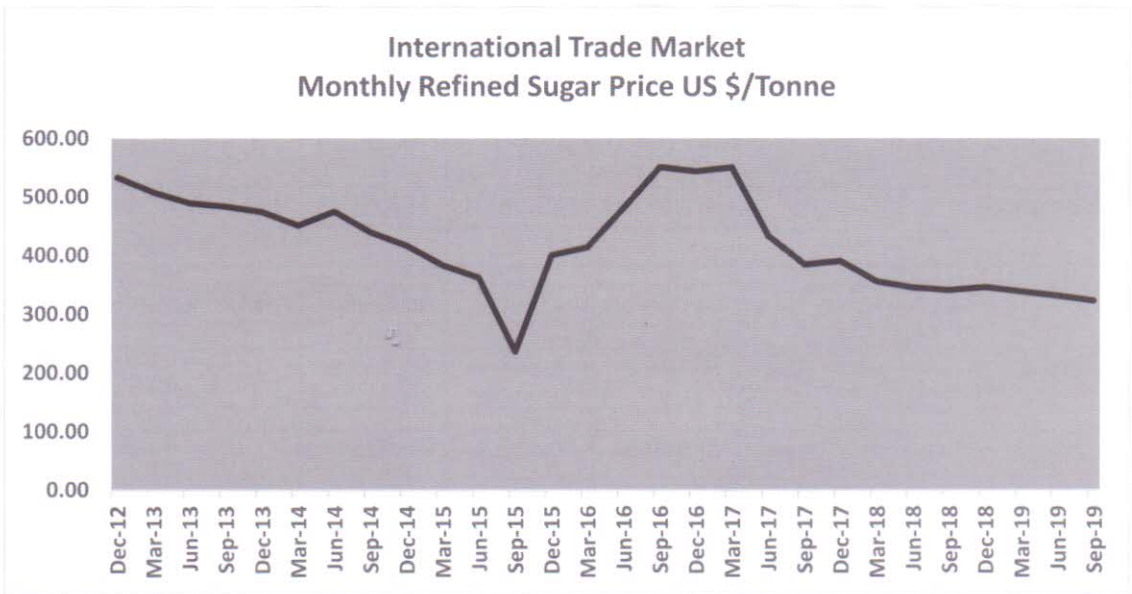
10 LARGEST NET-IMPORTERS (in mln metric tonnes, tel quel)

<i>TOTAL</i>			<i>RAW SUGAR</i>			<i>WHITE SUGAR</i>		
1	Indonesia	5.23	1	Indonesia	5.13	1	China	2.81
2	China	5.06	2	Algeria	2.36	2	Sudan	0.96
3	USA	2.37	3	China	2.25	3	Uzbekistan	0.52
4	Malaysia	1.95	4	Malaysia	1.94	4	USA	0.51
5	Bangladesh	1.9	5	USA	1.87	5	Sri Lanka	0.50
6	Algeria	1.77	6	Bangladesh	1.82	6	Egypt, Arab R.	0.48
7	Korea, Rep. of	1.61	7	Korea, Rep. of	1.80	7	Israel	0.46
8	Saudi Arabia	1.31	8	India	1.58	8	Afghanistan	0.44
9	Egypt, Arab R.	1.29	9	Canada	1.24	9	Saudi Arabia	0.43
10	Canada	1.23	10	Nigeria	1.22	10	Chile	0.41

Source: - ISO Sugar Year Book 2019 data 2018

World Sugar Balances (October/September)					
in thousand tonne, raw value					
	2019/20	2018/19	2017/18	2016/17	2015/16
Production	187,048.9	186,907.2	194,284.3	179,603.2	174,048.8
Consumption	187,693.6	185,566.1	183,642.3	180,543.7	179,932.4
Global surplus/ deficit	-1,500.3	-242.5	8,192.2	-2,490.4	-9,240.1
Imports	70,144.9	68,848.7	69,575.6	70,553.7	71,630.3
Exports	71,000.5	70,432.1	72,025.5	72,103.5	74,986.9
Ending stocks	75,384.3	76,884.6	77,127.1	68,934.9	71,425.3
Stocks in % of consumption	40.16	41.43	42.00	38.18	39.70

Source: - www.agra-net.com/agra/international-sugar-and-sweetener-report/features/world-sugar-balance-seen-slightly-in-deficit-in-201920-571042.htm

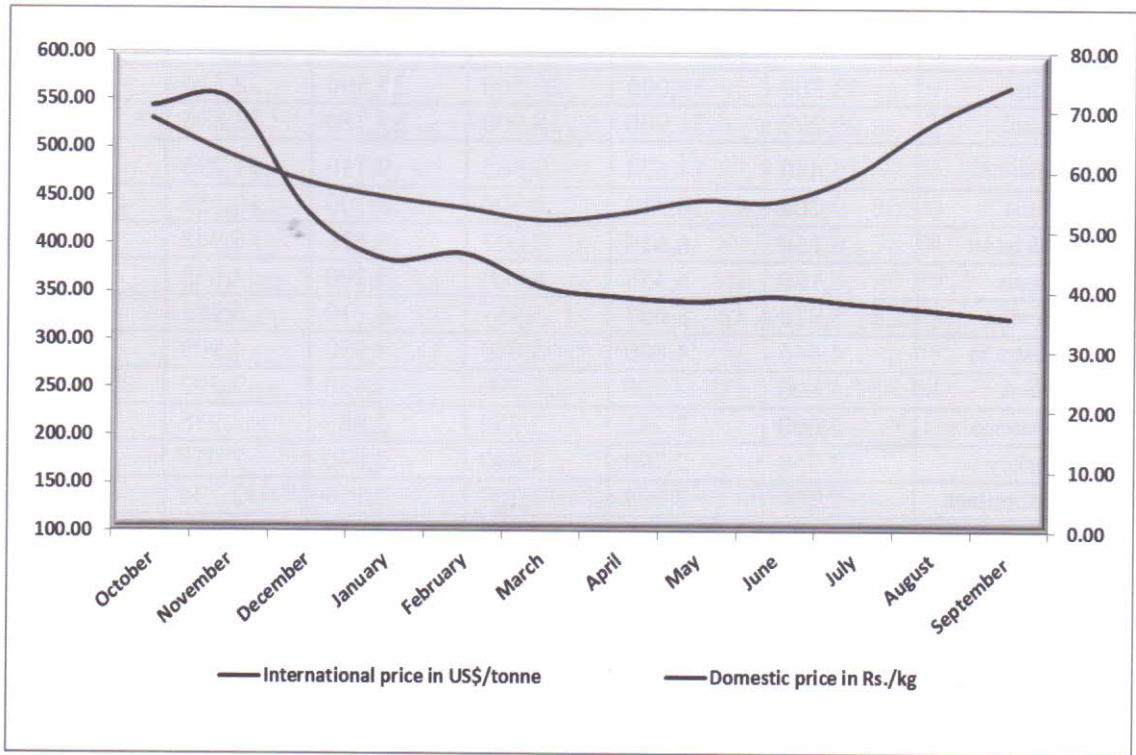


US \$/Tonne

Months	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
October	557.85	499.90	428.59	388.48	579.40	384.40	355.70
November	521.88	471.25	420.59	400.87	526.40	390.40	348.20
December	518.54	449.61	397.97	409.23	524.20	394.70	332.50
January	505.36	424.34	397.80	415.73	540.00	352.40	341.30
February	499.06	454.76	384.33	388.39	532.60	361.30	348.00
March	518.01	471.84	364.95	436.29	577.20	351.20	324.80
April	500.88	468.19	367.38	438.45	459.50	330.80	334.90
May	482.20	478.00	365.28	474.05	434.80	354.60	330.60
June	483.03	476.27	352.15	527.53	403.70	349.50	328.40
July	477.42	458.03	358.72	541.33	402.30	317.90	324.00
August	484.63	437.52	341.01	538.80	386.90	325.90	301.60
September	485.20	421.61	348.83	570.70	362.20	377.00	342.70
Avg. Price	502.84	461.25	383.78	460.82	477.43	357.5	334.39

Source: www.investing.com/commodities/London-sugar

**Monthly Domestic & International Sugar Prices Comparison
For Sugar Year 2018-19**



World Major Cane sugar Producing Countries Five Year Production & Ranking

“000” Tonne raw value (Oct. – Sept.)

S. #	*Name	* 2018-19	2017-18	2016-17	2015-16	2014-15	Ranking
1	India	33,300	32,000	20,500	25,500	28,310	1
2	Brazil	29,290	31,900	38,900	37,750	33,896	2
3	Thailand	15,440	14,674	9,865	9,750	11,296	3
4	China	9,200	10,310	9,300	8,700	10,556	4
5	Pakistan	6,250	6,615	7,047	5,325	5,948	5
6	Russia	6,180	6,458	6,100	5,200	4,638	6
7	Mexico	5,920	6,007	5,957	6,119	5,985	7
8	Australia	4,640	4,800	5,000	4,950	4,909	8
9	U.S.A	3,400	7,720	7,390	7,450	7,592	9
10	Guatemala	2,690	2,745	2,750	2,883	2,976	10
11	Turkey	2,750	2,700	2,400	2,040	2,053	11
12	Philippines	2,200	2,085	2,200	2,150	2,274	12
13	Indonesia	2,100	2,250	2,200	2,475	2,507	13

Source: World Sugar Balance
November 2018

* ISO sugar year book 2019 data
2018

Former Chairmen

Pakistan Sugar Mills Association (PSMA)

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	Mr. 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	Mr. 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
2006-2008	Mr. Shunaid Qureshi
2008-2010	Mr. Iskander M Khan
2010-2012	Mr. Javed A. Kayani
2012-2014	Mr. Shunaid Qureshi
2014-2016	Mr. Iskandar M Khan
2016-2018	Mr. Javed A. Kayani
2018-2020	Mr. Aslam Faruque

**Zone wise List of Sugar Mills
Locations and Districts**

PUNJAB

Mills Name & Address		Tel & Fax	Mills Location/ Dist.
1. Abdullah Sugar Mills Ltd. (unit-I&II), 6-F, Model Town, Lahore	Ph. Fx. Email:	(042)-35917321-3 (042)-35917317 pa.md@hwgc.com.pk	Depalpur Okara
2. Al-Arabia Sugar Mills Ltd, 6-F, Model Town, Lahore	Ph. Fx. Email:	(042)-35917321-3 (042)-35917317 pa.md@hwgc.com.pk	Shahpur Sargodha
3. Adam Sugar Mills Ltd., 345-A/1, Gulberg-III, Lahore.	Ph. Fx. Email:	(021)-32417812-17 (042)-35757216 (021)-32427560 (042)-35874220 asmlho@adam.com.pk adamsugar2@gmail.com	Chistian Bahawalnagar
4. Liaison Office 345-A-I, Gulberg-III, Opp-Wyeth Laboratories, Lahore.	P & F Fx.	(042)-35757216 (042)-35874220	
5. Ashraf Sugar Mills Ltd., 11-Upper Mall, Lahore.	Ph. Fx. E.mail:	(042)-35717333- 555/35717222 (042)-35716999 info@asml.org.pk	Ashrafabad Bahawalpur
6. Baba Farid Sugar Mills Ltd., 5 -KM faisalabad Road Okara, 42-G, firdous market, Gullberg- iii, lahore	Ph. Fx. E.mail:	044-2522878 044-2522978 javediqbal@bfm.com	Faisalabad Okara
7. Brother Sugar Mills Ltd., 437-E-Block, Near Allah-Ho round, -about, Johor town Lahore.	Ph. Fx. E.mail:	(042)-35757013-16 (042)-35710417 bsml_lhr@yahoo.com	Chunian Kasur
8. Chanar Sugar Mills Ltd., 7-A, New Muslim Town, Lahore.	Ph. Fx. E.mail:	(042)-35868077-78 (042)-35862264 javedkayani@gmail.com	Faisalabad
9. Chaudhry Sugar Mills Ltd., 146- Abu Bakar Block, New Garden Town, Lahore	Ph. Fx. E.mail:	(042)-35858135 -6 (042)-35858477 sharifwl@wol.net.pk	Gojra Toba Tek Singh
10. SW Sugar Mills Ltd., 240-Y, Commercial Area, DHA, Lahore,	Ph. Fx. E.mail:	(042)-3668334-2 (042)-35762187 info@pswsugar.com.pk	Sillanwali Sargodha

11. IMPERIAL SUGAR MILL – I., Ismail, Aiwan-e-Science Building, 205 -Ferozpur Road, Lahore.	Ph. (042)-35758970-72 Fx. (042)-35763247 E.mail: waqar.bandey@imperialsugars.com	Phalia MandiBahauddin
12. JK Sugar Mills Ltd ., Ismail, Aiwan-e-Science Building, 205 -Ferozpur Road, Lahore.	Ph. (042)-35758970-72 Fx. (042)- 35763247 E.mail: waqar.bandey@imperialsugars.com	Mian Channu Khanewal
13. Etihad Sugar Mills Ltd., 3, Upper Mall, Bawa Park, Lahore	Ph. (042)-35877921-23 (042)- 35751865-66 Fx. (042)- 35712293 E.mail: sohail.dil@etihad.com.pk shakeel@tapl.com	Karamabad Rahimyar Khan
14. Fatima Sugar Mills Ltd., Fatima Trust plaza LMQ, Road, Multan. E-11, khayaban-e- Jinnah, Lahore cantt	Ph. 061-4512031 042-111-328-462 Fx. 061-4884282 E.mail: fatmagrp@mul.paknet.com.pk muhammad.amjad@fatima-group.com	Kot Addu Muzafargarh
15. Darya Khan Sugar Mills Ltd., 42-G, Firdous Market, Gulberg III, Lahore.	Ph. (042)- 35884180-5 Fx. (042)- 35884138 Email: qaissarabbas@gmail.com imporientchemicals@gmail.com	Darya Khan Bhakhar
16. Gunj Buksh (Pasrur) Sugar Mills Ltd., (non Member) 21/ 69, F.C.C, Green Villas, Gulberg-II, Lahore.	Ph. (042)- 35752123/ 3252759 FX. (042)- 35760329/ 047-76310011 E.mail: csml@wol.net.pk	Toba Road Jhang
17. Hamza Sugar Mills Ltd., A/22, S.I. T. E. Mauripur Road, Karachi	Ph. (021)-32561101-5/ 068-5582256 Fx. (021)- 2561873/ 068-5582043 E.mail: hamza_sugar@yahoo.com	Khanpur Rahimyar Khan
18. Haq Bahu Sugar Mills Ltd., 65-Infantry Road, Military Accounts Colony, Lahore Cantt.	Ph. (042)-36834016-22 Fx. (042)-36811253 E.mail: Inf@maccagroup.com	Layyah Road Jhang
19. Haseeb Waqas Sugar Mills Ltd., 6-F, Model Town, Lahore.	Ph. (042)-35917321-3 Fx. (042)-35917317 E.mail: hwg@brain.net.pk pa.md@hwgc.com.pk	Nankana Sahib
20. Huda Sugar Mills Pvt Ltd., Askari Villas # 2, Army Housing Scheme, Sarwar Shaheed Road, Lahore	Ph. (042)- 36682935 041- 2560884 Fx. (042)- 36681599 (041)-2669090 E.mail: irfanfmhsm@hotmail.com	Sangla Hill Nankana Sahib

21.Hunza Unit –I &II Sugar Mills Ltd., 1-A, New Muslim Town, Lahore.	Ph. 042-111-161-161 042-35882941-4 Fx.. 042-35882945/35862245 E.mail: hunzasugar.headoffice@gmail.com	Shahkot Faisalabab
22.Husein Sugar Mills Ltd., 30-A/E-1, old FCC Gulberg III, Behind Gaddafi Stadium, Lahore.	Ph. (042)-35762089-90 Fx. (042)-35712680 E.mail: info@huseinsugarmills.com	Jaranwala Faisalabad
23.Indus Sugar Mills Ltd., 17-Tipu Block, New Garden Town, Lahore	Ph. (042)-35882801-2 Fx. (042)-35835180 E.mail: indussugar10@hotmail.com khokharsohail@hotmail.com	Kot Bahadur RajanPur
24.Ittefaq Sugar Mills Ltd., 40-B-II, Gulberg III, Lahore	Ph. (042)-35765021-6 Fx. (042)-35759546 E.mail: alshafi@brain.net.pk	Pakpattan Pakpattan
25.Jauharabad Sugar Mills Ltd., 125-B, Quaid-e-Azam Industrial Estate , Gate No. 4, kot lakhpat, Lahore.	Ph. (042)- 35213490-2-3 Fx. (042)- E.mail: amtax@jsml.com.pk www.jsml.com.pk	Jauharabad Khushab
26.JDW-1 Sugar Mills Ltd., 17- Abid Majeed Road, Lahore -Cantt	Ph. (042)-36664891-92 Fx. (042)-36654490 E.mail: jdwho@brain.net.pk sabir@jdw-group.com	Mouza Shirin Rahimyar Khan
27.JDW-II (United) Sugar Mills Ltd., 17- Abid Majeed Road Lahore Cantt.	Ph. (042)- 36664891-92 Fx. (042)-36654490 E.mail: mjaffar@jdw.group.com sabir@jdw-group.com	Sadiqabad Rahim Yar Khan
28. Two Star Industries Ltd., umar group of companies City Tower, 9 th floor 6 K main Boulevard Gulberg-II Lahore	Ph. 042-111-130-130 Fx. 042--5770015 E.mail: maqsood_anwar@hotmail.com	Kamalia Toba Tek Singh
29.Kashmir Sugar Mills Ltd., 40-B-II, Gulberg -III, Lahore	Ph. (042)-35765021-6 Fx. (042)-35759546 E.mail: alshafi@brain.net.pk	Shorkot Jhang
30.Layyah Sugar Mill Ltd., 2D-1, Gulberg III, Lahore.	Ph. (042)-35771066-71 Fx. (042)-35756687 E.mail: nauman.khan@almoiz.com info@almoiz.com	Layyah

31. Macca Sugar Mills Ltd., 65- Infantry Road, Lahore Cantt.	Ph. (042)-36834016-20 Fx. (042)-36811253 E-mail: farrukh@maccagroup.com maccagroup@yahoo.com	Manga Road Kasur
32. Madina Sugar Mills Ltd., Gate 4, University town Faisalabad, Sargodha Road, Faisalabad.	Ph. (041)-8869891-96 Fx. (041)-8869899 E-mail: acc1msm@madinahgroup.com.pk Afm.msm@madinahgroup.com.pk	Chiniot
33. Noon Sugar Mills Ltd., 4 Sarwar Road, Near Rahat Bakeri Lahore Cantt.	Ph. (042)-36655777 Fx. (042)- 35788468 E-mail: iqbal.talib@noonsugar.net info@noonsugar.net	Bhalwal Sargodha
34. Popular (Ex-National) Sugar Mills Ltd., 311-Chapal Plaza, Hasrat Mohani Road, II Chundrigar Road, Karachi	Ph. (042)- 37465670 (0486)-886281-3 Fx. (042)- 37414866 E-mail: chairman@populargroup.com.pk gm.psml@populargroup.com.pk	Jan Muhammadwala Sargodha
35. Pattoki Sugar Mills Ltd., 42-G, Firdous Market, Gulberg III, Lahore.	Ph. (042)- 35884180-5 Fx. (042)- 35884138-40 E-mail: qaisarabbas@gmail.com imporientchemicals@gmail.com	Pattoki Kasur
36. Ramzan Sugar Mills Ltd., 55-K, Model Town Lahore	Ph. (042)- 35857234-5 Fx. (042)- 35857232 E-mail: sharif@wol.net.pk ikram@sgroup.pk	Chiniot Jhang
37. R. Y. K Sugar Mills Ltd., 75/4D Sarfaraz Rafiqi Road, Lahore Cantt.	Ph. (042)-36601381-4/(068)-5882101 Fx. (042)-36601385 E-mail: info@rykmills.com	Rahim Yar Khan
38. SAFINA SUGAR MILL 2D-1, Gulberg III, Lahore	Ph. (042)-35771070-71 (042)-35771068 Fx. (042)-35756687/35771175 E-mail: nauman.khan@almoiz.com info@almoiz.com	Lalian Jhang
39. Shahtaj Sugar Mills Ltd., 72/C-1, mm alam road Gulberg III Lahore	Ph. (042)-35710482-84 Fx. (042)-35711904 E-mail: fianance@shahtajsugar.com mail@shahtajsugar.com	Mandi Bahauddin Gujrat
40. Shakarganj (I) Sugar Mills Ltd., Toba Tek Singh Road, Jhang, Jhang.	Ph. (0477)-631001 / 5 (047)-7652801-05 Fx. (047)-652811 E-mail: info@shakarganj.com.pk parvez@shakarganj.com.pk	Toba Road Jhang
41. Shakarganj -II Mills Ltd.,	Ph. (042)-35783801-3	AddaBhone

57 KM Jhang Sargodha Road Addah
Bhone,
10th Floor, 10-B, Block E-II Main Boulevard,
Gulberg III, Lahore

Fx. (042)-35870357 **Jhang**
(047)-7223017
E.mail: m.saifullah@shakarganj.com.pk

42.Rasool Nawaz Sugar Mills (Pvt) Ltd,
Gourmet Foods (unit 6) Mauza Bhubatian
Stop,Main Defence Road, Lahore.

(042)- 35321736 **Gojra**
Fx. (042)- 35213794 **Faisalabad**
E.mail: ranarayasad@gourmetpakistan.com
Rana Rayasad 0300-6661654

43.Sheikhoo Sugar Mills Ltd.,
28-CCA, C- Block, Phase -VI,
D.H.A
Lahore Cantt

Ph. (042)- 35728901-6, **Kot Adu**
(042)- 35792508 **Muzafargarh**
Fx. (042)- 35728904
E.mail: Yousuf_anis@Sheikhoosugar.com
Shakeel.ahmed@sheikhoosugar.com

44.Tandlianwala-I&II Sugar Mills Ltd.,
66-L, Gulberg II,
Lahore.

Ph. 042- 35750220 **Kanjwani**
(042)- 35715081-6
Fx. (042)- 35710929 **Faisalabad**
E.mail: ahmad_lodge@yahoo.com
farid@pepsi-lahore.com.pk

SINDH

Mills Name & Address		Tel & Fax	Mills Location / Dist.
1. Abdullah Shah Ghazi Sugar Mills Ltd., 65-Infantry Road, Military Accounts Colony, Lahore		(042)-36834016- 22 FX: (042)-36811253 E-mail: info@maccagroup.com	Gharo Thatta
2. Al-Abbas Sugar Mills Ltd., Pardeis House, Survey # 2/1, R.Y – 16, Old Queens Road, Karachi 74000.		Ph. 021-32470220-9 021-32470087 Fx. 021-32470090/32470467 E-mail: sugar@cyber.net.pk	MirwahGorchani Mirpurkhas
3. Al-Noor Sugar Mills Ltd., 96-A, Sindhi Muslim Society, Karachi		Ph. 021-34550161-3 021-34551990 Fx. 021-34556675 E.mail: alnoor@fascom.com	Taluka Moro Nawabshah
4. Alliance Sugar Mills. Pvt. Ltd 3B Nisar Colony Nisar Road Lahore Cantt.		Ph. 042-36660051-52 Fax 042-36660065 Email info@alliancesugar.com	Ubauro Ghotki

<p>5. Ansari Sugar Mills Ltd., 2nd Floor, Block-4, Hockey Club Of Pakistan stadium, Karachi.</p>	<p>Ph. 021-35655131-4 Fx. 021-35680533 E.mail: naudero@cyber.net.pk</p>	<p>Matli Hyderabad</p>
<p>6. Army Welfare Sugar Mills Ltd, Army welfare Trust, AWT Plaza, 6th Floor, The Mall, Rawalpindi.</p>	<p>Ph. (0297) 861205 Fx. (0297) 861733 E.mail: awsm@awt.com.pk</p>	<p>Badin</p>
<p>7. Bawany Sugar Mills Ltd., 2nd Floor, Block-4, Hockey Club of Pakistan Stadium, Karachi</p>	<p>Ph. 021-35655131-4 Fx. 021-35680533 E.mail: naudero@cyber.net.pk kmajid@cyber.net.pk</p>	<p>Talhar Badin</p>
<p>8. Bandhi Sugar Mills Ltd., 2nd floor, Continental Trade Center, Main Clifton Road, Karachi,</p>	<p>Ph. 021-3503215-19 Fx. E.mail:</p>	
<p>9. Chamber Sugar Mills 2nd Floor, Block-4, Hockey Club of Pakistan Stadium, Karachi</p>	<p>Ph. 021-35655131-4 Fx. 021-35680533 E.mail:</p>	
<p>10. Dewan Sugar Mills Ltd., 7th floor, Block- Finance & Trade Centre Main Shahra-e-Faisal Karachi.</p>	<p>Ph. 021-111-364-111 Fx. 021-35630814 E.mail: dewanyousuf@dewangroup.com.pk</p>	<p>Budho Talpur Thatta</p>
<p>11. Deharki Sugar Mills Ltd., 17-Abid Majid Road, Lahore Cantt</p>	<p>Ph. 042- 36664891-96 Fx. 042- 36654490 E.mail:</p>	<p>District Ghotki</p>
<p>12. Digri Sugar Mills Ltd., 48 J /1, Block 6, P.E.C.H.S. Karachi.</p>	<p>Ph. 021-34541195-8 Fx. 021- 34534501 E.mail: digri@cyber.net.pk</p>	<p>Digri Mirpurkhas</p>
<p>13. Faran Sugar Mills Ltd., Plot 43/1E, (B) PECHS Block 6, Shahra-e-faisal Karachi</p>	<p>Ph. 021- 34322851-4 Fx. 021- 34322864 E.mail: info@faran.com.pk</p>	<p>Sheikh Bhirkio Hyderabad</p>
<p>14. AKT (Gulf) Sugar Mills Ltd., 64-E-1, Gulberg III Lahore.</p>	<p>Ph. (042)-575903640 Fx. (042)-35760466 E.mail:</p>	

15.J.D.W-III (Ghotki) Sugar Mills Ltd.,
17-Abid Majeed Road,
Lahore Cantt.

Ph. 042-36664891-96
Fx. 042-36654490
E.mail: jdwho@brain.net.pk
jdwho@jdw-group.com

**Channu
Ghotki**

16.Habib Sugar Mills Ltd.,
3rd Floor, Imperial Courts,
Dr. Ziauddin Ahmed Road, Karachi

Ph. (021)- 35680036-9
Fx. (021)- 35684086
E.mail: sugar@habib.com

Nawabshah

17.Khairpur Sugar Mills Ltd.,
3rd Floor, Plot No. 15-C, 9th Phase-V,
Commercial Lane, Zamzama, D.H.A
Karachi.

Ph. (021)- 35810771-5
(021)- 35810776
E.mail: headoffice@jumanigroup.com

**NarooDhoro
Khairpur**

18.Khoski Sugar Mills Pvt. Ltd.
2nd Floor,
Hockey Club of Pakistan Stadium,
Karachi

Ph. (021)-35655131-4
Fx: (021)-35680533
E.mail: kmajid@cyber.net.pk

**Khoski
Badin**

19.Kiran Sugar Mills Pvt. Ltd.
Noman Goth Duber Road,
Rohri Dist, Sukkur

Ph. 0771- 5623561
Fx: 0771- 5623564
E.mail: kiransugarmillsLtd@gmail.com

**Khoski
Badin**

20.Larr Sugar Mills Ltd.,
2nd Floor, Hockey Club,
Pakistan Stadium, Karachi

Ph. (021)- 35655131- 4
Fx. (021)-35680533
E.mail: lsml@cyber.net.pk

**DehKinjhar –
Sajawal
Thatta**

21.Matiari Sugar Mills Ltd.,
C-48, KDA Scheme No.1
Karachi. 75350

Ph. (021)-345213823/ 34529698
Fx. (021)- 34541734
E.mail: matsug@attglobal.net

**Matiari
Hyderabad**

22.Mehran Sugar Mills Ltd.,
14-B, 14th floor, Dolmen City,
Executive Tower, HC-3, Block # 04,
Marine Drive, Clifton Karachi

Ph. (021)-35297814
Fx. (021)- 35297818-27
E.mail: msm@mehransugar.com

**Tando Allah
Yar Hyderabad**

23.Mirpurkhas Sugar Mills Ltd.,
2nd Floor, Modern Motors House,

Beaumont Road, Karachi.

Ph. (021)-111-345-111/ 35682565-7
Fx. (021)-35682839
E.mail: msmho@sat.net.pk
saeed.uuzaman@gfg.com.pk

**Mirpurkhas
Mirpurkhas**

24.Mirza Sugar Mills Ltd.,
10th Floor, Lakson Square,
Building No. 1, Portion 'B',
Sarwar Shaheed Road, Karachi

Ph. (021)-35680151/35680148
Fx. (021)- 35680183
E.mail: msml1@cyber.net.pk

**Deh Charo
Tappo Badin**

25.Najma Sugar Mills Ltd.,
Sikander House F-58, Park Lane
Block –5 Clifton, Karachi

Ph. (021)-35831082/35870321
Fx. (021)-35831069
E.mail: nsml@khi.comsets.net.pk

**Jhuddo
Mirpurkhas**

26. Naudero Sugar Mills Ltd., 2 nd Floor, Hockey Club, Pakistan Stadium, Karachi.	Ph. (021)-35655131-4 Fx. (021)-35680533 E.mail: naudero@cyber.net.pk	Naudero Larkana
27. New Dadu Sugar Mills Ltd., 2 nd Floor, Block # 4, Hockey Club of Pakistan Stadium ,Karachi	Ph. (021)-35655131-4 Fx. (021)-35680533 E.mail: kmajid@cyber.net.pk	Piarogoth Dadu
28. Pangrio Sugar Mills Ltd., 10 th Floor Lakson Square, Building No. 1 Portion 'B' Sarwar Shaheed Road, Karachi	Ph. (021)- 35680151/35680148 Fx. (021)- 35680183 E-mail: psml2@cypber.net.pk	Deh Rajauri-2 Badin
29. Ranipur Sugar Mills Ltd., 23-f/1, Block -6, PEACHS Karachi.	Ph. (021)-343144854-8 Fx. (021)-34314857 E.mail: ranipursugar@gmail.com	Ranipur Khairpur
30. Sakrand Sugar Mills Ltd., 41-K, Block -6 , P.E.C.H.S., Karachi	Ph. (021)-111-484-848/34531637 (021)-34531642 Fx. (021)- 34546456/34535374 E.mail: admin@sakrandsugar.com	Qazi Ahmed Nawabshah
31. Sanghar Sugar Mills Ltd., Clifton Centre Room 204, clifton Block 5- Karachi	Ph. (021)-35371441-3 Fx. (021)- 35371444 E.mail: info@sangharsugarmills.com	Sindhri Sanghar
32. Seri Sugar Mills Ltd., 1 st Floor, Hussain Ali Centre, M.A Jinnah Road, Karachi.	Ph. (021)-32439630 (021)-32437828 Fx. (021)-32413600 E.mail: tabani@cyber.net.pk	Deh Norai Jagir Hyderabad
33. Shahmurad Sugar Mills, Ltd., 96-A, Sindhi Muslim Society, Karachi	Ph. (021)-34550160-3 Fx. (021)-34556675 E.mail: alnoor@fascom.com	Jhok Sharif Thatta
34. Sindh Abadgar's Sugar Mills Ltd., 209, 2 nd Floor, Progressive plaza, Beaumont Road, Karachi	Ph. (021)-35638212-138 Fx. (021)-35638219 E.mail: fasm@unitedgroup.org.pk	Deenpur Hyderabad
35. TMK Sugar Mills Ltd., 1 st Floor, Hassan Ali Centre, Opp. M.W. Tower, M.A. Jinnah Road, Karachi.	Ph. (021)-32439630 (021)-32437828 Fx. (021)-32413600 E.mail: tabani@cyber.net.pk	TMK Hyderabad
36. SGM Sugar Mills Ltd., (Sardar Ghulam Mohammad) National Hockey Stadium Gate No. 16, Gulberg, Lahore	Ph. 042-32404550-2 Fx. (042)-32404554 E.mail: info@sgmsugar.com	Jarwah Road, Ghotki

37. Tharparkar Sugar Mills Ltd.,
108/ 03, 3rd Avenue,
Block # 5, Main Clifton,
Near Police Club, Karachi

Ph. (021)-35863730/ 38065903 **Tharparkar**
(021)-35467613 **Mirpurkhas**
Fx. (021)-35863729
E.mail: tharparkarsugar@yahoo.com

38. Tandoallayar Sugar Mills Ltd.,
2nd Floor, Hockey Club of Pakistan
Stadium, Karachi

Ph. (021)- 35655131-4
Fx. (021)- 35680533
E.mail:

KHYBER PAKHTUNKHWA

Mills Name & Address		Tel & Fax	Mills Location/ Dist.
1. Chashma-I Sugar Mills Ltd., Unit1, University Road, Dera Ismail Khan	Ph. Fx. E. Mail:	(0966)750090-91 (0966)750092 csmdik@brain.net.pk	D.I. Khan
2. Chashma-II Sugar Mills Ltd., Unit 2, Ramak, Dera Ismail Khan	Ph. Fx.	(0966)756365, 756365 (0966)756327	D.I. Khan
3. Tandlianwala Sugar Mills Ltd. (Ext. Zamand) 66-L, Gulberg II, Lahore.	Ph. Fx. E.mail:	0966-756153/756158 0966-756301/756298 tsmlzamand@yahoo.com farid@pepsi-lahore.com.pk	Miran Dera Ismail Khan
4. Al-Moiz Industries Ltd., 2-D-1, Gulberg-III, Lahore	Ph. Fx. E. mail:	(042)-35771066-71 0966-720910 (042)-35756687/35771175 nauman.khan@almoiz.com	Chashma D.I. Khan
5. Bannu Sugar Mills Ltd., SeraiNaurang, Bannu	Ph. Fx.	(0969)-351022/ 352444 (0969) 350112	SeraiNaurang Bannu
6. Premier Sugar Mills Ltd., Mardan.	Ph. Fx. E.mail:	0937-862051-2 0937-862989 psmmdn@premiergroup.pk	Mardan
7. Khazana Sugar Mills Ltd., Khazana, Peshawar	Ph. Fx.	091-2041694/2045732 091-2040550	Peshawar

**Sugar Production Marketing & Stock
Summary (Season 2018-19)
as on 30th September, 2019**

	Area: hect.	
	Prod: tonnes	
	Yield: T/hect	
Sugarcane Plantation Area		1,101,073
Sugarcane Production		67,129,645
Average Yield		60.97
	Sugarcane Crushing	Sugar Produced
Punjab	30,111,468	3,103,595
Sindh	15,930,655	1,719,302
KP	3,725,991	387,848
(Cane sugar) Total	49,768,113	5,210,744
Sugar refined from raw		
Sugar produced from beet		56,828
Total sugar produced		5,267,572
Carryover stock (2017-18)		2,424,707
*Import (2018-19) (Source: PBS)		7,852
Total Availability (2018-19)		7,700,131
Export (2018-19) (Source: PBS)		- 691,994
Total consumption (2018-19) @ 24.42 kg/capita		- 5,196,000
Carry Forward (2019-20)		1,812,137

Source: PSMA Zonal Offices/ P.G

Monthly Retail Sugar Price Rs. per kg (2018-19)

October	54.78
November	54.87
December	55.63
January	58.47
February	59.14
March	61.15
April	65.63
May	67.99
June	70.83
July	72.38
August	75.38
September	75.02
Average	64.27

Source: PBS

Sugarcane & Sugar – I					
Sugar Year (Oct-Sept.)	2010-11	2011-12	2012-13,	2013-14	2014-15
Sugarcane Area (Hect)	987,700	1,046,000	1,128,098	1,171,687	1,113,161
Sugarcane Produced	55,444,100	58,038,200	63,718,523	67,427,975	62,794,827
Yield (Tonnes/Hect)	56.4	55.48	56.5	57.55	56.41
Cane Utilized by Mills	44,511,571	48,248,535	50,089,483	56,460,524	50,795,218
percentage of utilization	82.36	83	80	84	80.9
Cane support price Punjab, KP / Sindh	125/125/127	150/150/152	170/170/172	170/172/170	180/182/180
Average Recovery (%)	9.25	9.68	10.04	9.9	10.12
Sugar Production (Cane)	4,119,516	4,652,164	5,030,129	5,587,568	5,139,566
Sugar Production (Beet)	13,535	18,216	33,028	27,389	22,727
Sugar Production (Raw)	39,678	-	-	-	-
Total Sugar Production	4,172,729	4,670,380	5,063,158	5,614,957	5,162,293
Beginning Stocks 1st Oct.	1,033,003		*1,394,013	844,171	1,197,128
Imports/TCP	755,417	-	**25,043	**32,259	**28,166
Total Available	5,205,732	5,779,701	6,457,171	6,459,128	6,359,421
Export	Nil	48,672	1,193,000	750,000	415,000
End Stock 30th Sep.	1,109,321	1,394,013	844,171	1,197,128	1,344,421
Consumption / Marketing	4,096,411	4,385,688	4,420,000	4,512,000	4,600,000
Average Consumption / month	341,367	365,688	368,333	376,000	383,333
Season's Av. retail price Rs./ kg	72.82	57.16	53.41	54.80	58.91
International Sugar Price US \$/Tonne	709.37	607.45	502.84	459.28	377.30
Molasses Prod. (C+B+R)*	2,034,729	2,207,632	2,252,751	2,524,202	2,247,137

* Cane + Beet + Raw

Sources: FBS, ISO, Zonal Offices

Sugar Year(Oct-Sept.)	Sugarcane & Sugar – II				Estimates
	2015-16	2016-17	2017-18	2018-19	2019-20
Sugarcane area (hect)	1,130,820	1,216,894	1,340,926	1,101,073	1,090,246
Sugarcane produced(Tonnes)	65,450,704	75,450,620	83,289,340	67,129,645	67,631,088
Yield (Tonnes/Hect)	57.88	62.00	62.11	60.97	62.03
Cane Utilized by Mills	50,042,249	70,989,948	65,639,963	49,768,113	51,399,626
Percentage of Utilization	76.45	94.00	78.80	74.13	76%
Cane Support Price Punjab, KP, Sindh	180/182/180	180/182/180	180/182/180	180/182/180	190/192/190
Average recovery (%)	10.16	9.87	10.02	10.47	10%
Sugar Production (cane)	5,082,110	7,005,480	6,580,111	5,210,744	5,139,962
Sugar Production (beet)	32,791	42,996	40,922	56,828	50,000
Sugar Production (raw)	-	-	-	-	
Total Sugar Production	5,114,901	7,048,476	6,621,033	5,267,572	
Beginning Stocks 1st Oct.	1,344,421	950,000	2,473,476	2,424,707	1,812,137
Imports/TCP	535	-	-	7852	
Total Available	6,459,322	7,998,476	9,094,509	7,700,131	
Export	293,541	425,000	1,469,802	691,994	
End Stock 30th Sep. (Mills)	12,65,781 #950,000	2,473,476	2,424,707	1,812,137	
Consumption / Marketing	4,900,000	5,100,000	5,200,000	5,196,000	
Average Consump. / month	408,333	425,000	4,33,333	433,000	
Season's Av. Retail price / kg	63,76	61.43	53.57	64.27	
Intl. Av. Sugar Trade Price US \$/T	460.82	477.43	357.50	334.39	
Molasses Prod. (C+B+R) *	2,246,540	3,095,986	2,971,992	2,263,109	

* C: Cane, B: Beet, R: Raw

** TCP stock as on 31-08-2015(Ignored)

Sources: FBS, ISO, Zonal Offices

Agreed in SAB meeting

Sales Tax, FED & SED (SROs)

Applicability of Sales Tax, SED & FED on Sale of Sugar

S. NO.	Effective Dates of SRO	Reference	Remarks	Exclusive Values		Applicable Rates				
				Existing Value	Revised Value	Sales Tax	Further Tax	SED	FED	Total
Rs./Kg										
1	02-Jan-09	S.R.O 4(I)/2009	Fixed Price for Sales Tax increased	24.57	28.88	16.00	-	1.00	-	17.00
2	23-Aug-09	S.R.O (I)/2009	Sales Tax Rate reduced to 50% i.e 8%	28.88	28.88	8.00	-	1.00	-	9.00
3	15-Mar-11	S.R.O 232(I)/2011	Sales Tax on Actual Price from Fixed Price	28.88	Actual	8.00	-	1.00	-	9.00
4	19-Mar-11	S.R.O 261(I)/2011	SED Rate Increased from 1 to 2.5%	Actual	Actual	8.00	-	2.50	-	10.50
5	03-Jun-11	S.R.O 481(I)/2011	Levy of FED in place of Sales Tax at same Tax Rate	Actual	Actual	-	-	2.50	8.00	10.50
6	03-Jun-11	S.R.O 489(I)/2011	SED withdrawn on sugar	Actual	Actual	-	-	-	8.00	8.00
7	25-Jun-16	Through Finance Act 2016	Levy of Sales Tax alongwith Further Tax in place of FED	Actual	Actual	8.00	2.00	-	-	10.00
8	30-Jun-16	S.R.O 492(I)/2016	Sales Tax on Actual Price from Fixed Price	Actual	56.00	8.00	2.00	-	-	10.00
9	02-Sep-16	S.R.O 812(I)/2016	Fixed price increased from 56 to 60	56.00	60.00	8.00	2.00	-	-	10.00
10	23-May-18	Through Finance Act 2018	Further Tax rate increased from 2% to 3%	60.00	60.00	8.00	3.00	-	-	11.00
11	1st-July-19	Through Finance Act 2019	Sales Tax rate increased from 8% to 17%	60.00	60.00	17.00	-	-	-	17.00

Sugar Cane – A high value cash crop

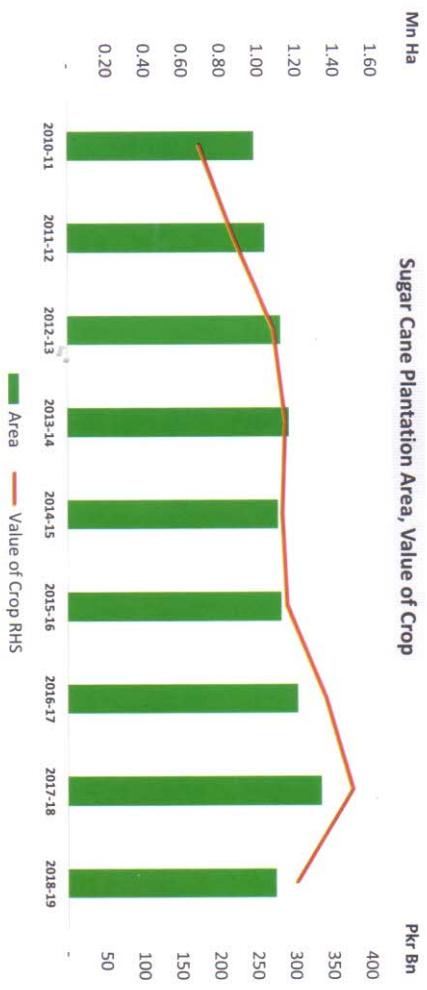
1.1 Mn Hectares
AREA UNDER CULTIVATION

Average value of sugar cane crop grown in Pakistan
PKR 300+ Billion

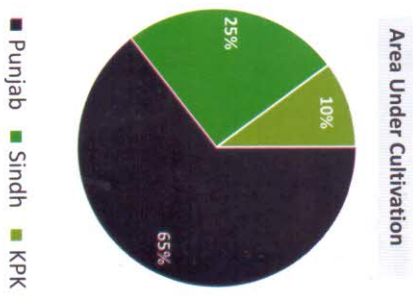


67.2Mn Tons
Sugar Cane Produced in 2018-19

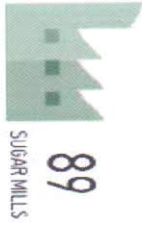
5%: Sugarcane area versus total cultivated land of Pakistan



Source: PSMA, Economic surveys of Pakistan



Pakistan Sugar Industry Highlights



Directly Employed:
100k+

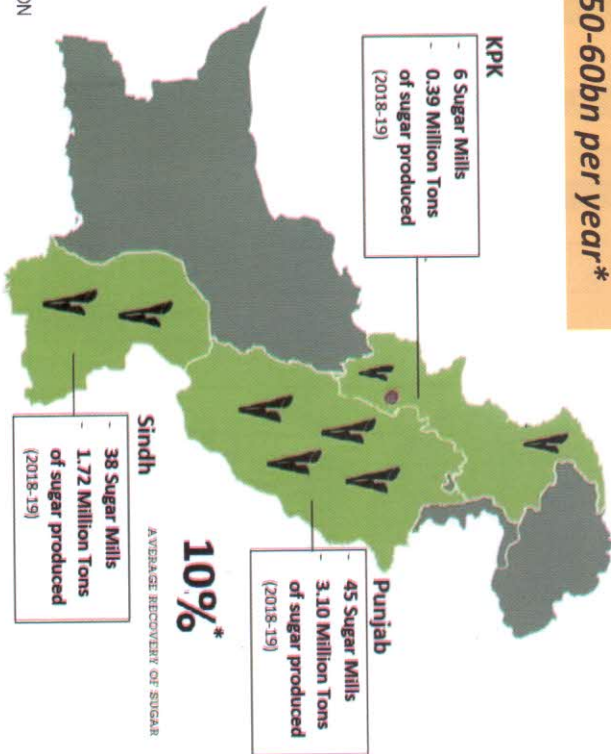
Direct and indirect taxes
PK50-60bn per year*



Indirectly
Dependent:
1+ Million
House holds

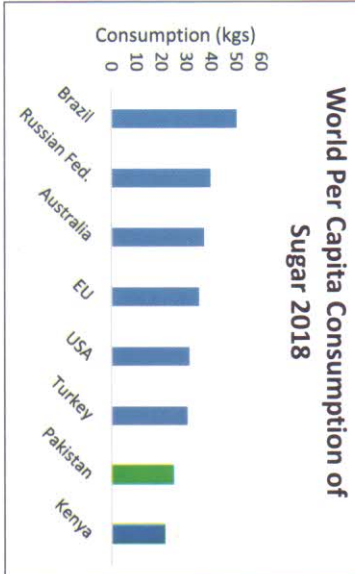
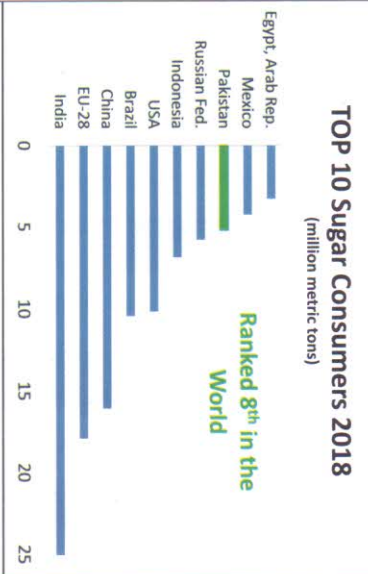
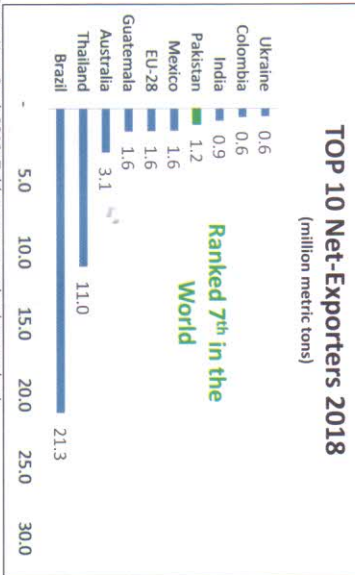
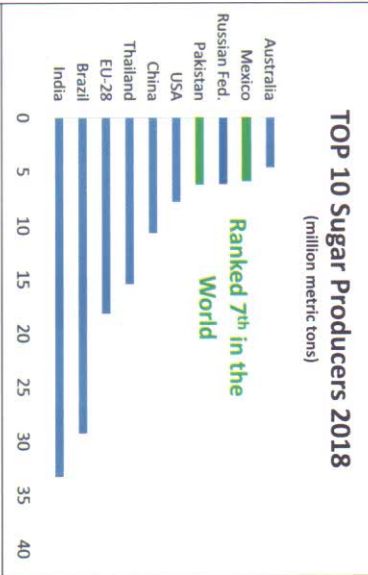


Average
Crushing
Capacity
7,300
TCD**



Source: -PSMA, * estimated based on sugar production of 5.4mn tons for 2019, ** based on 82 functional Sugar Mills

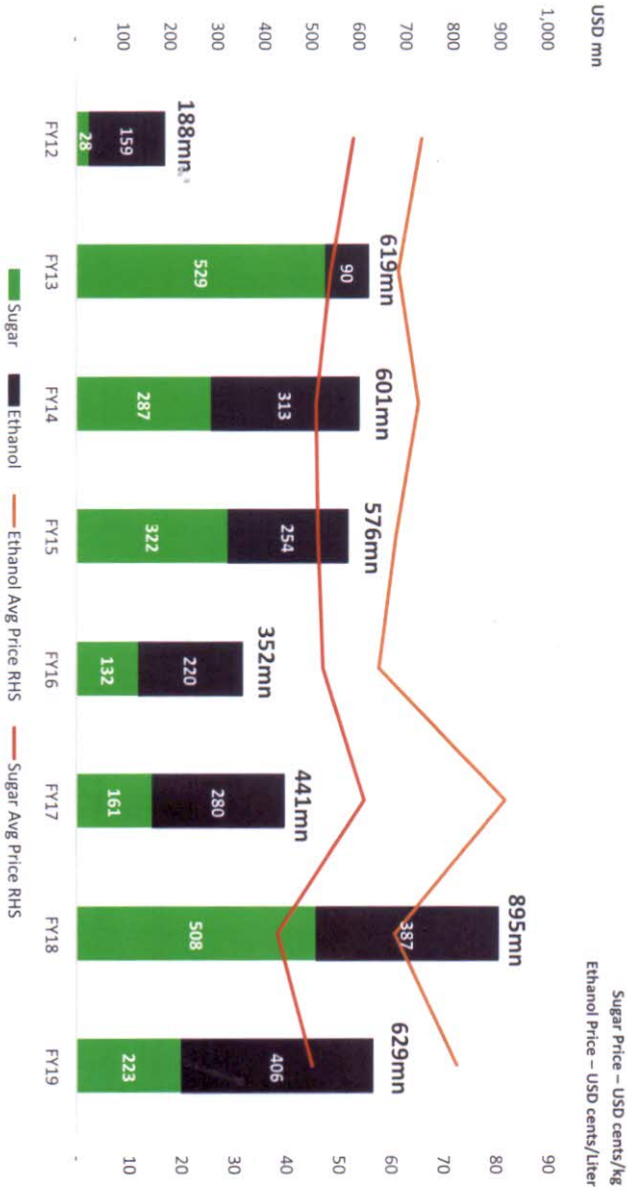
Pakistan sugar in global perspective



Source: ISO Sugar Year Book 2019. Tables are on a calendar year basis

Third largest export sector of Pakistan in FY2017-18 & FY2018-19

Export Revenues from Sugar and Ethanol only lagged behind Textiles and Rice in FY2017-18 and FY2018-19



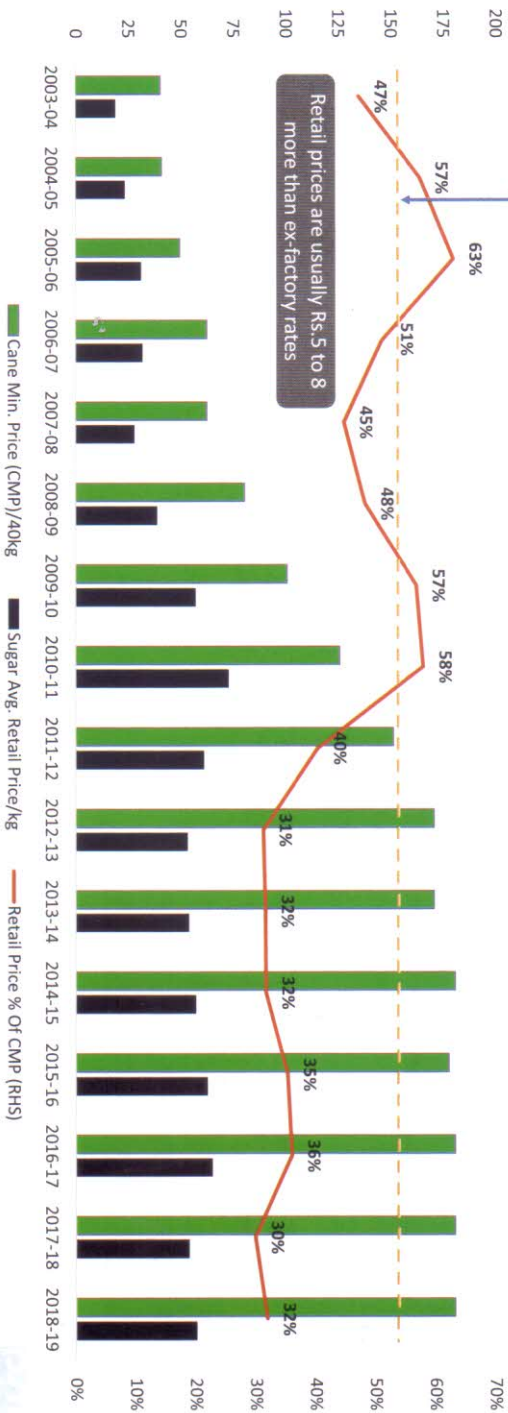
Source: PSMA, SBP

Weak Linkage between Cane and Sugar Prices

Over the years, ratio of sugar retail price as compared to cane minimum price has decreased considerably

From 2003-04 till 2011-12, sugar retail prices were 52% of cane minimum price on average

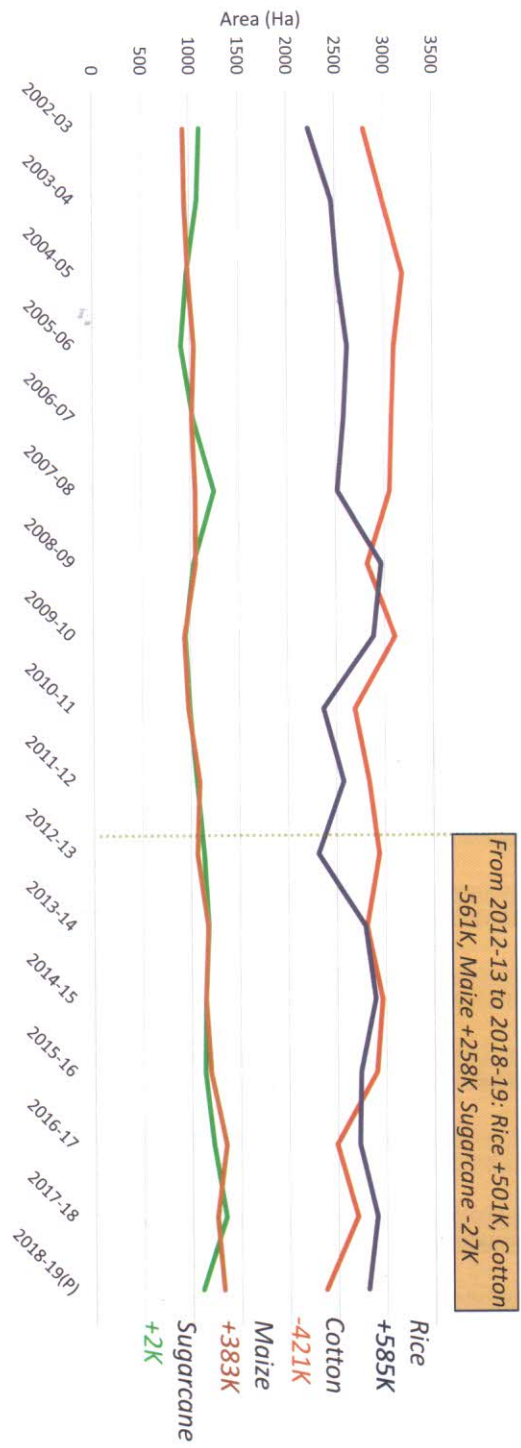
This ratio fell to between 30-35% in the surplus years



Source: PSMA, Economic survey of Pakistan 2018-19 provisional data

Progress but not at the cost of other crops

Area Under Important Crops (000 Ha)



Sugarcane has not contributed towards reduction in planted area of any other important crop of Pakistan

Source: Economic Surveys of Pakistan 2018-19, (P) Provisional

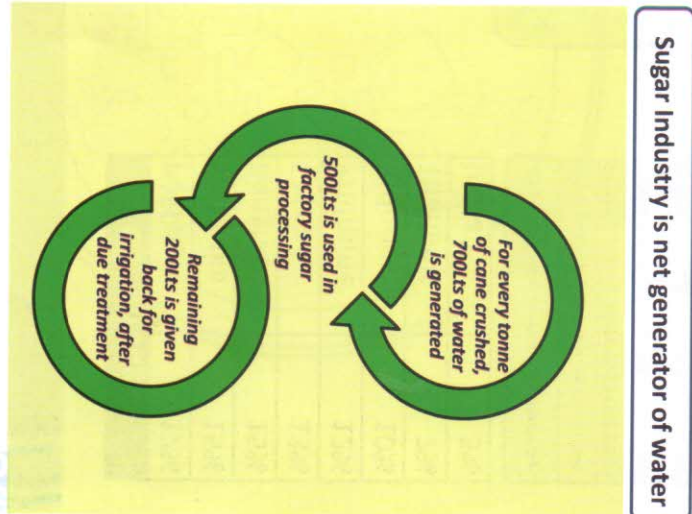
Sugar cane compares well with other crops on water

Monthly Water Consumption By Crops	
Paddy	325mm
Cotton	150mm
Soybean	150mm
Sugar Cane	150mm
Jowar	100mm

Water Required Per Kg of Output	
Cotton	10,000Lts
Groundnut	3,100Lts
Rice	2,500-3,400Lts
Sugar	1,500-2,000Lts

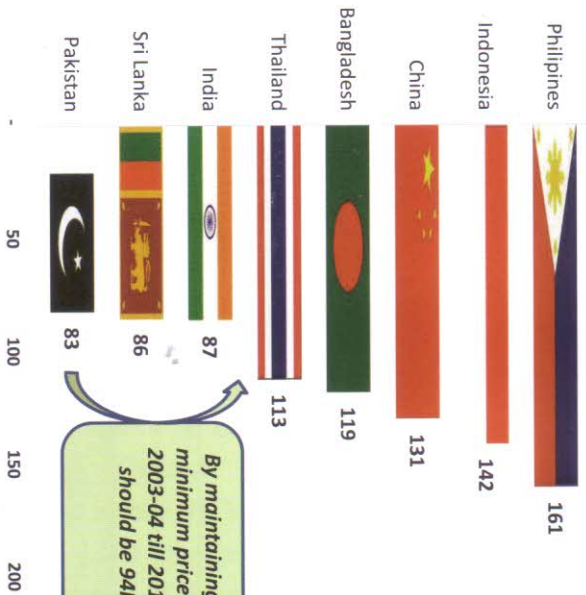
Total carbon and water footprint of sugarcane up to point of consumption is much less than other crops that require further processing

Source: *The Guardian*, ISMA (Indian Sugar Mills Association, Paper titled "Sugar Industry is water efficient"



Despite highest % GST, Pakistan has lowest retail sugar price in the region

Retail Sugar Prices/kg in different Countries as on Feb 07, 2020*



By maintaining average correlation between cane minimum price and sugar retail price i.e. 52%, from 2003-04 till 2011-12, Retail Sugar Prices in Pakistan should be 94RS/kg that make us stand between India and Thailand

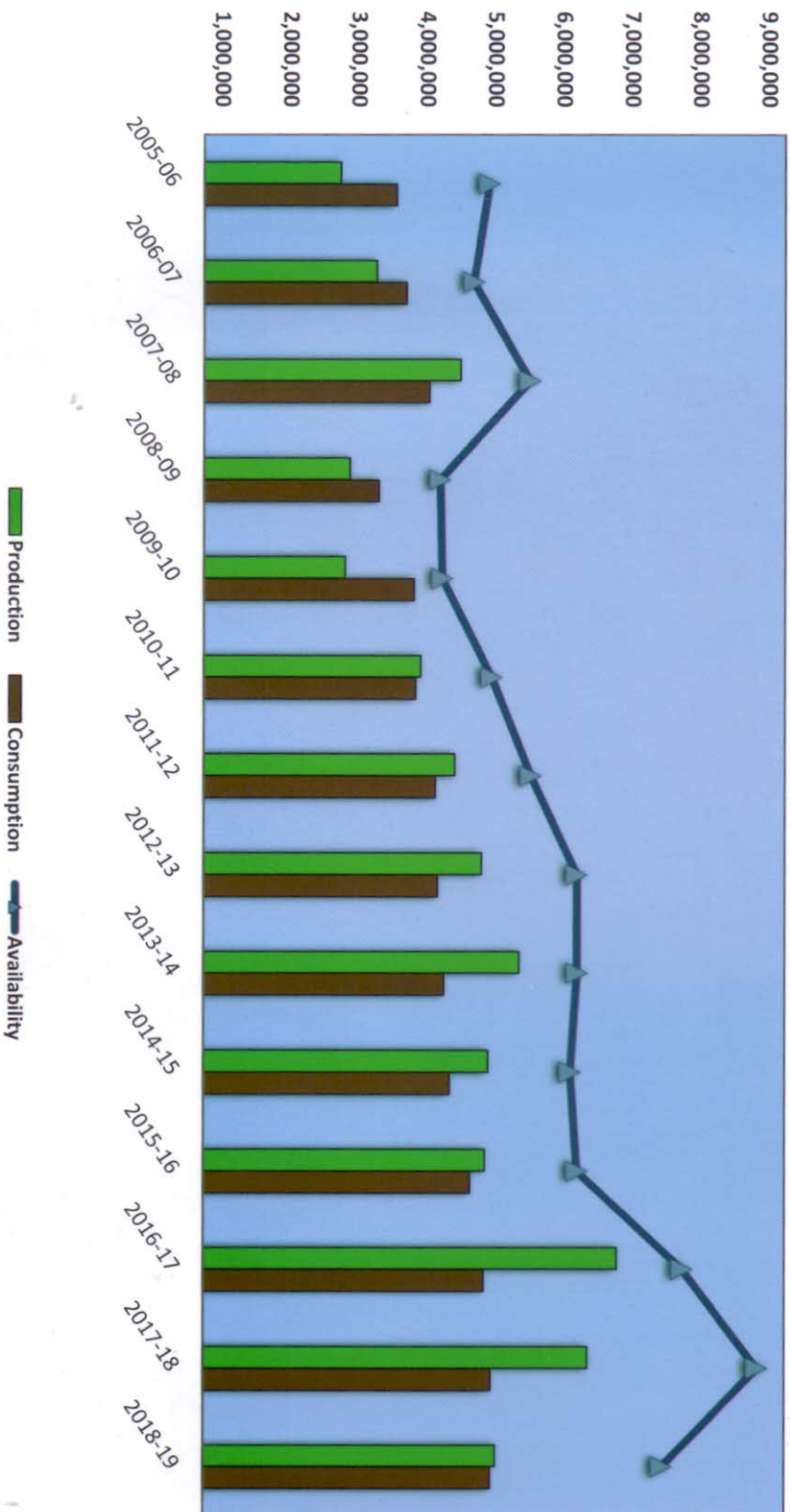
Country	GST on Sugar
Pakistan	17%
Sri Lanka	15%
Bangladesh	15%
China	13%
Philippine	12%
Indonesia	10%
Thailand	7%
India	5%

Sugar Retail Prices are converted into Pkr/kg

Country	Currency	Pkr Equivalent
Philippine	1 Peso	3.05
Indonesia (April 4'19)	1 IDR	0.01
China	1 CNY	22.30
Sri Lanka	1 LKR	0.85
India	1 INR	2.16
Thailand (Dec-12'19)	1 BHT	5.14
Bangladesh (Jan 4'20)	1 BDT	1.83

Source: Business Recorder, SBP, sunsirs.com, chinimandi.com, USDA, cbsl.gov, dhakaribure.com, sra.gov.ph, globalprice.info, avulara.com, psa.gov.ph

**Pakistan Sugar Mills Association
Domestic Production, Availability & Consumption
Sugar Year Oct. to Sept. 2005-2019**



Sugarcane Production at Glance

