AN EXAMINATION OF FOREIGN SUBSIDIES AND TRADE POLICIES FOR SUGAR

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EXECUTIVE SUMMARY

The International Center for Agricultural Competitiveness (ICAC) at Texas Tech hosts and maintains a database of subsidies and trade policy information for public use. The report summarizes the information obtained and housed in the database relating to sugar in key producing, consuming, exporting, and importing countries. Data on tariff rates were gathered from the World Trade Organization tariff database. Production, export, and import data are from the U.S. Department of Agriculture. Other county policies are summarized from the U.S. Department of Agriculture's (USDA) Global Agricultural Information Network (GAIN) reports obtained online from the Foreign Agricultural Service (FAS)-USDA website.[2] Additional information was obtained from other sources where noted.

The report covers 29 countries (including the EU), which, according to USDA data for 2025/26, account for 86.2% of global sugar production, 68.8% of global consumption, and 87% of global exports.

The key findings of this review are:

- Government intervention in the world sugar market remains extreme and widespread with a wide variety of measures to support domestic sugar producers.
- Import tariffs and quotas are the most widely used intervention around the world in order to support sugar prices.
- Domestic price supports and input subsidies are also common intervention tools and export subsidies by some countries further distort and depress the world market.
- The proliferation of ethanol mandates has greatly increased the indirect price support of sugar worldwide where, unlike the United States, sugar is the primary feedstock for ethanol production.
- Average applied Most Favored Nations (MFN) import tariff rates vary widely around the world, with a high of near 100% in Turkey. Bound tariffs are over 100% in several countries.

[2] United States Department of Agriculture, Foreign Agricultural Service. 2026. Reports available online at: https://www.fas.usda.gov/data/search?reports%5B0%5D=report_type%3A10251. The most recent report is cited, but previous year's reports may also be utilized.

Applied Tariffs

Table 1 shows the average applied tariffs for MFN countries as well as the World Trade Organization (WTO) bound tariffs, and Figure 1 shows the average applied tariffs across countries.

Table 1. Consolidated Tariff Schedules - World Trade Organization

HS17 - Sugars and Sugar Confectionary
Latest Year Reported to WTO for each country

Country	Average Applied MFN Rate (%)	Average Bound Rate (%)
Turkey	99.5	107.3
India	55.7	126.2
Kenya	42.4	100.0
Thailand	41.0	50.5
Dominican Republic	32.9	46.3
Nicaragua	30.0	57.6
China	28.7	27.4
Mexico	28.1	119.4
Venezuela	23.6	95.1
Jamaica	20.2	100.0
Ukraine	19.4	19.4
Philippines	19.1	40.9
EU	18.1	17.5
Argentina	17.6	33.3
El Salvador	17.1	66.5
Pakistan	15.0	114.7
Brazil	14.8	34.4
Honduras	13.1	35.3
Nigeria	12.6	150.0
Guatemala	11.7	70.0
Ecuador	11.1	34.3
Russia	10.7	11.2
Colombia	10.6	107.4
Indonesia	6.8	58.3
Eswatini	3.6	75.2
South Africa	3.6	75.2
Peru	0.7	35.6
Egypt		36.5
Zimbabwe		150.0

Source: World Tariff Profiles. 2026. World Trade Organization (available online at: https://www.wto.org/english/res_e/publications_e/world-tariff-profiles-2026_e.htm).

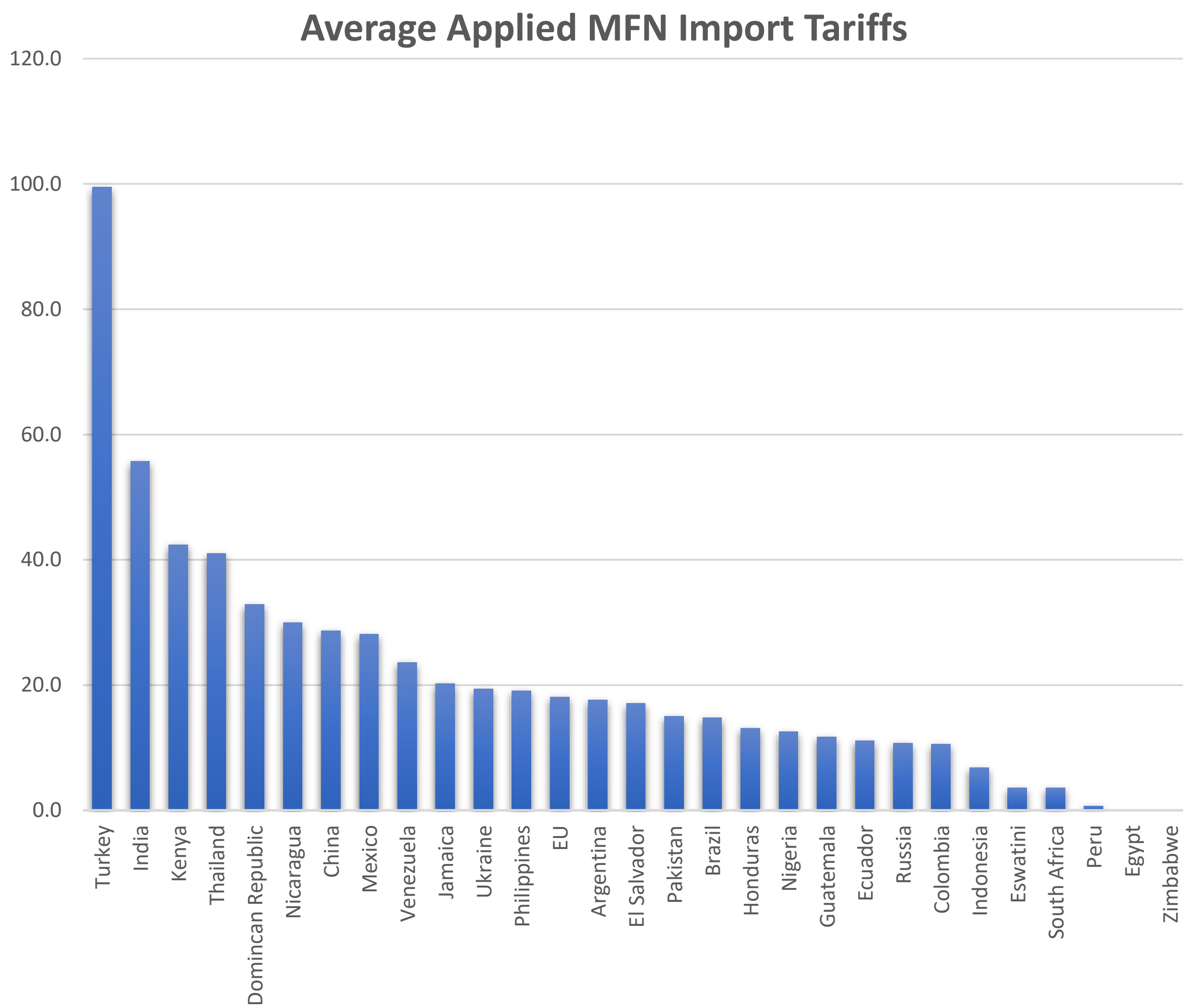

Figure 1. Average Applied Most-Favored Nation (MFN) Import Tariffs for HS17 (Sugars and Sugar Confectionary), Last Reported Year for Each Country.

Source: World Tariff Profiles. 2026. World Trade Organization (available online at: https://www.wto.org/english/res_e/publications_e/world-tariff-profiles-2026_e.htm).

These applied tariffs can vary substantially within the HS17 code across products, but the overall results show a clear picture of the countries that have the highest forms of price-based border protection.

Overall Policy Mechanisms for Sugar

Figure 2 shows the breadth of policy mechanisms that are used for major sugar producing/exporting and importing countries.

Country	Export Tariff/Quota	Import Tariff/Quota	Production Quota	Direct Price Support	Input Subsidies	Ethanol Mandates	Other Non-Price Support †
Argentina	X	X		X		X	
Brazil		X			X	X	
China		X		X	X	X	X†
Colombia		X		X		X	
Domincan Republic		X		X		X	X
Ecuador		X		X		X	X†
Egypt		X		X	X		X†
El Salvador		X					X
Eswatini		X		X			X
EU		X				X	X
Guatemala		X				X	X
Honduras		X		X			X
India	X	X		X	X	X	X
Indonesia		X		X	X	X	X†
Jamaica		X		X	X		X†
Kenya		X		X			X†
Mexico	X	X		X	X		X
Nicaragua		X					X
Nigeria		X			X		X
Pakistan	X	X		X			
Peru		X		X			X†
Philippines	X	X					
South Africa	X	X		X			X†
Thailand		X		X		X	
Turkey		X	X	X		X	X†
Ukraine	X	X					
Venezuela		X					X†
Zimbabwe		X		X	X		X

† - "Other Non-Price Support" category includes **government ownership of mills, stocks, and/or production** in addition to other possible forms of indirect industry support.

Figure 2. Policy Mechanisms Used by Various Sugar Countries
Source: USDA GAIN Database (available online at: https://www.fas.usda.gov/data/search?reports%5B0%5D=report_type%3A10251 and ICAC Foreign Subsidies Database (available online at: https://www.depts.ttu.edu/ceri/).

As can be seen in the figure, import tariffs and quotas are the most widely used forms of policy intervention. Import tariffs and quota protect domestic industries by preventing the free importation of sugar. Many countries couple import tariffs with direct income or price support to sugar producers. These policies, when used, serve to further enhance the price/income support of domestic producers. Some countries also use input subsidies such as fertilizer price subsidies, equipment subsidies, low-interest loans and debt forgiveness, while some countries also use other non-price support such as research and development funding, government ownership of sugar mills, and state-trading enterprises. Finally, there is a growing group of countries that utilize ethanol mandates to increase the demand for ethanol and, hence, for sugar. In most of these countries, the largest source of ethanol is sugarcane. A few countries, like India, Indonesia, and China, for example, use many layers of domestic support/protection.

The Value of Transfers to Sugar Producers

Table 2 shows the value of single commodity transfers[3] to sugar producers as measured by the OECD.

Table 2. Producer Single Commodity Transfers for Sugar in $MIL, 2005-2024.

Producer Single Commodity Transfers--$MIL

Year	Colombia	Mexico	Türkiye	European Union	Brazil	China	India	Indonesia	Philippines	Russia	South Africa	Ukraine	Average
2005	438.78	845.00	87.77	4637.97	28.83	938.63	1309.05	272.27	125.25	203.68	165.31	190.29	770.24
2006	329.95	318.66	136.11	1858.42	75.78	-404.17	-485.80	249.70	307.19	428.50	100.56	82.75	249.80
2007	287.65	763.65	259.39	2509.95	96.34	929.17	890.63	389.33	413.94	341.14	242.57	232.53	613.02
2008	310.84	588.15	85.01	2194.68	116.55	-8.28	352.96	519.83	559.67	570.07	170.43	373.84	486.15
2009	442.85	2.43	7.61	865.62	105.52	2662.29	1245.06	357.12	395.86	225.00	33.59	240.16	548.59
2010	576.61	333.44	97.27	100.98	327.70	1960.15	-1161.53	400.34	784.89	162.51	79.66	268.43	327.54
2011	357.42	102.90	10.47	57.12	170.42	1068.89	-2670.90	-35.83	567.93	0.01	67.88	181.93	-10.15
2012	292.38	615.68	20.37	62.34	167.24	1939.23	1072.57	407.87	586.92	0.00	176.80	303.02	470.37
2013	334.14	0.00	35.64	920.39	171.86	3826.57	788.53	617.51	489.78	557.49	200.48	381.82	693.68
2014	481.20	213.79	178.78	975.03	56.16	3213.23	2024.21	721.97	682.20	424.34	204.44	332.57	792.33
2015	491.89	404.01	410.08	651.61	40.53	4602.41	931.70	822.71	460.55	617.85	232.37	85.63	812.61
2016	197.01	212.37	125.58	288.59	38.01	4673.35	-108.85	1173.91	652.36	600.61	79.58	0.00	661.04
2017	93.70	903.30	70.82	303.62	33.58	3310.30	5587.69	1148.41	808.81	476.00	290.79	38.49	1088.79
2018	122.10	1109.86	156.40	837.53	14.27	4866.46	3718.31	1202.52	1008.41	532.12	384.48	239.83	1182.69
2019	0.00	970.25	32.59	697.51	12.32	5193.89	3626.82	1358.61	367.94	373.86	193.94	224.41	1087.68
2020	0.00	1086.67	201.06	397.16	5.84	5116.14	2783.00	1160.64	536.62	381.04	287.08	174.71	1010.83
2021	0.00	872.24	0.00	364.00	7.71	4829.99	3402.51	678.05	968.28	65.85	263.71	356.32	984.06
2022	299.86	703.19	0.00	1174.88	14.64	3689.39	5549.93	953.36	1494.25	660.53	173.30	287.69	1250.09
2023	240.41	1231.43	0.00	426.77	16.16	2536.17	5928.21	531.84	1575.73	183.45	157.21	66.79	1074.51
2024	105.58	1683.64	0.00	421.58	14.50	3613.50	8889.52	575.16	972.47	-113.93	296.88	114.06	1381.08
Average	270.12	648.03	95.75	987.29	75.70	2927.87	2183.68	675.27	687.95	334.51	190.05	208.76	773.75

Source: OECD, 2026 (see https://www.oecd.org/en/data/indicators/agricultural-financial-support.html). The OECD does not perform these calculations for all countries, so not all countries in this analysis are presented. Also, these agricultural support calculations do not include substantial government assistance to the energy sector, which in the case for sugarcane is very important for biofuels and electricity production.

Since 2017, China and India have provided the most single commodity transfers to sugar producers in the sample, ranging from 2x to nearly 7-8x larger than the next largest region/countries – Mexico, the Philippines, and the European Union. However, it is important to keep in mind these values should not necessarily be viewed in isolation and should be compared to total production. Also, as noted, the OECD database does not include support to sugarcane or sugarbeet producers for production of energy, such as biofuels and electricity production.

[3] According to the OECD, the definition of a single commodity transfer is: "the annual monetary value of gross transfers from consumers and taxpayers to agricultural producers, measured at the farm gate level, arising from policies linked to the production of a single commodity such that the producer must produce the designated commodity in order to receive the transfer." OECD'S PRODUCER SUPPORT ESTIMATE AND RELATED INDICATORS OF AGRICULTURAL SUPPORT: Concepts, Calculations, Interpretation and Use (The PSE Manual), *https://www.oecd.org/content/dam/oecd/en/topics/policy-issues/agricultural-policy-monitoring/producer-support-estimates-manual.pdf*

Individual Country Reports

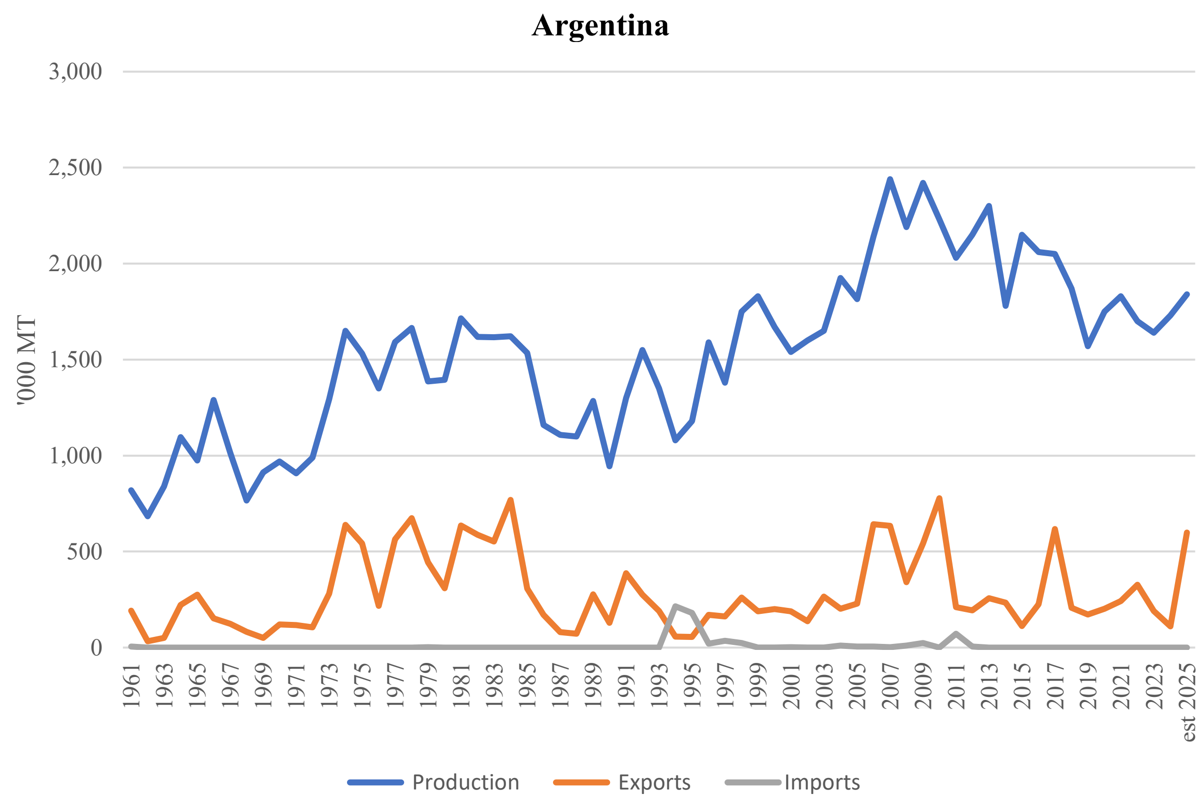

Figure 3. Argentinian Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[4]

- Argentina mainly relies on an import tariff to support domestic sugar prices. Argentina maintains a 35% tariff on imported refined sugar[5] and a 20% tariff on raw sugar. According to the WTO Argentina's average applied MFN tariff is 17.6% for the HS17 (Sugar and Sugar Confectionary) category. As noted in Figure 1, Argentina ranks 14th in applied tariffs in the sample.
- Argentina maintains an aggressive ethanol program which requires that domestic gasoline contain at least 12% ethanol. The government approved a temporary increase in the blending rate to 15 percent in March 2026.This mandate indirectly supports domestic sugar prices, and sugar consumption absorbing most of the domestic production while exports have remained flat.
- Industry stakeholders typically coordinate production and marketing strategies to maintain domestic prices at sustainable levels for producers and mills.

[4] See USDA. 2026. "Sugar Annual – Argentina," Report No. AR2026-0007, Buenos Aires, Argentina (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Canberra_Australia_AS2026-0009.pdf report available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Buenos%20Aires_Argentina_AR2026-0007.pdf)

[5] OECD-FAO, Agricultural Outlook: 2018-2027, Chapter 5: Sugar. OECD, Paris, France and FAO, Rome, Italy.

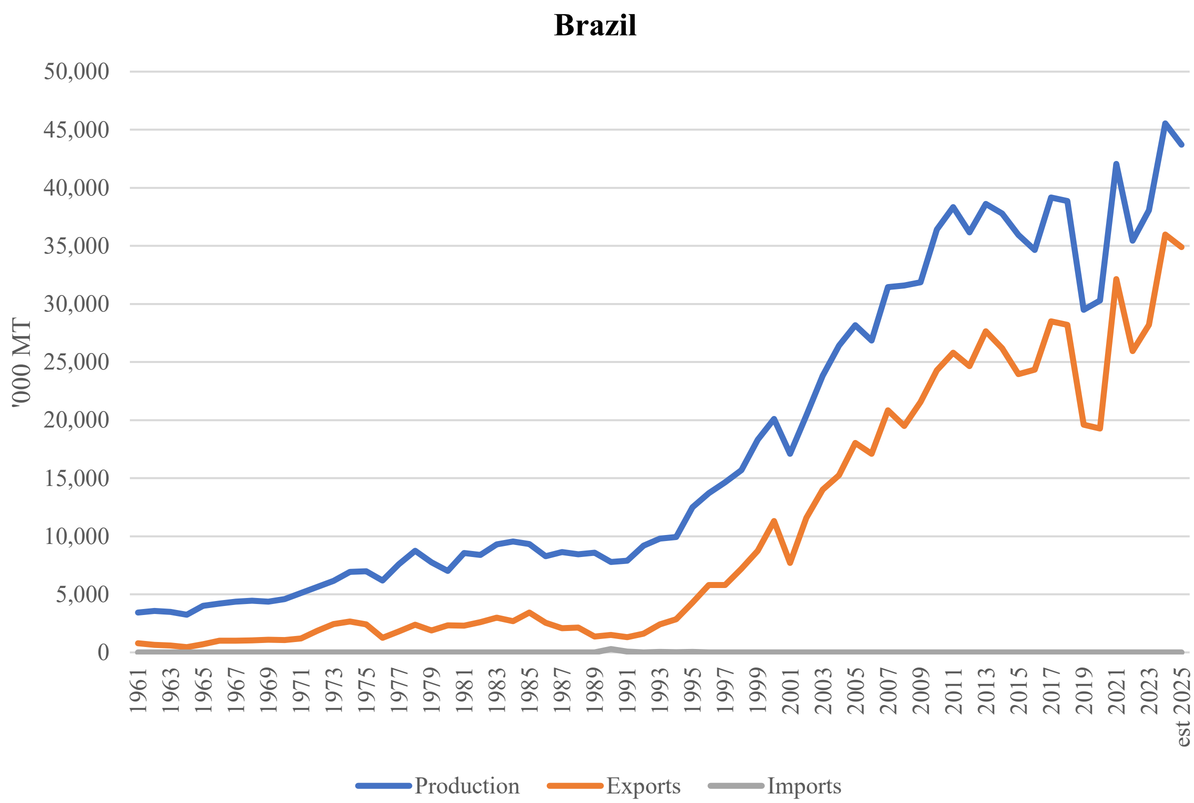

Figure 5. Brazilian Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Brazilian sugar exports mirror production (in proportion), indicating that domestic policies favoring sugar production are enhancing sugar exports.

Key Policies:[6]

- Brazil is the world's leading sugar exporter, by far, having benefitted from decades of government cane ethanol subsidies and consumption incentives. One study put the value to the Brazilin cane industry from ethanol cross subsidies and other programs at $2.5 billion per year, though these data are dated and the value is like larger based on the growth of both sugar and ethanol production.[7]
- Brazil's expansive ethanol policy is by far the largest driver of domestic sugar prices. As of 2025, the maximum blend rate was increased from 27% to 30% by volume of gasoline. USDA reports this change is expected to require approximately 1.4 billion liters of ethanol in MY2025/26.
- Brazil maintains an average 14.8% import tariff on the HS17 coded products (16% on raw cane and beet sugar).

[6] See USDA. 2026. "Sugar Annual – Brazil," Report No. BR2026-0020, Brasilia, Brazil (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Brasilia_Brazil_BR2026-0020.pdf).
[7] Patrick Chatenay, ProSunergy Ltd, "*Government Support and the Brazilian Sugar Industry*," Canterbury, England, April 2013. https://sugaralliance.org/project/government-support-and-the-brazilian-sugar-industry

- Brazil uses a myriad of input subsidies such as the guaranteed low interest loans and debt forgiveness, along with generic subsidies on inputs such as fertilizers and equipment.

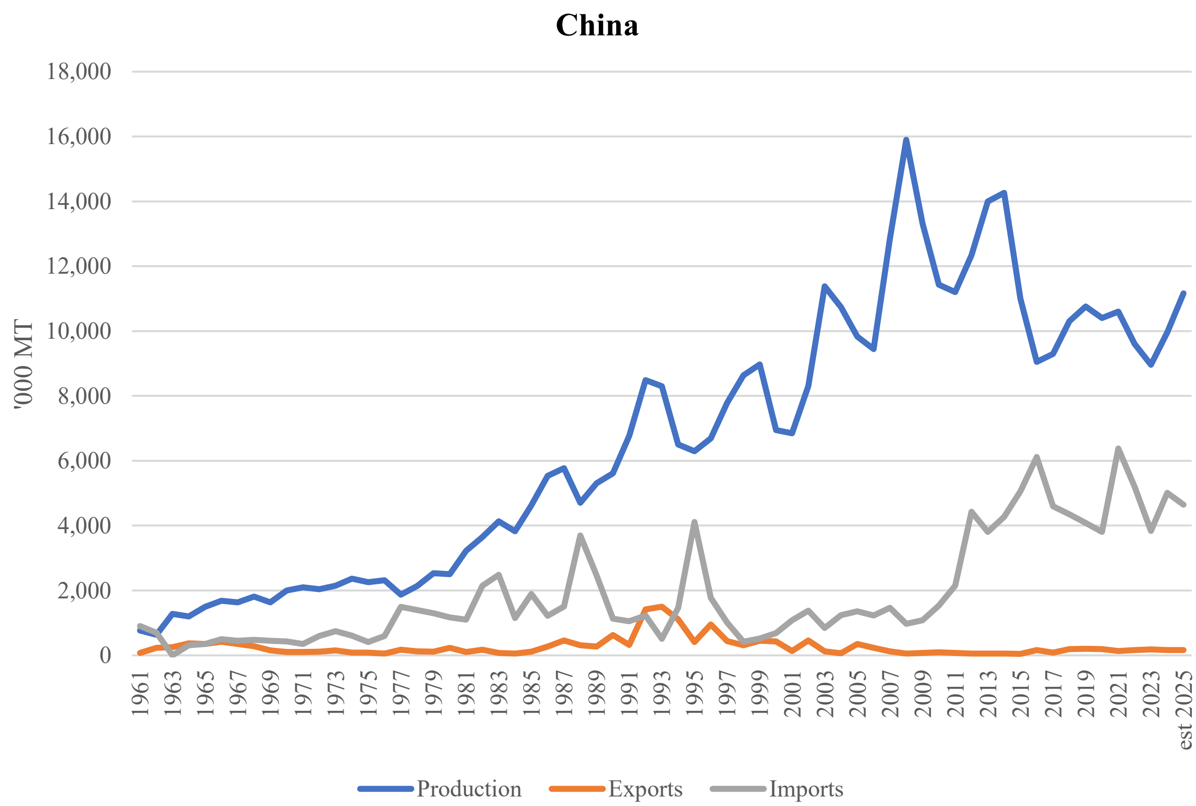

Figure 6. Chinese Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[8]

- China was the world's second largest sugar importer in 2024, but also the fourth largest producer. The government tightly controls the Chinese sugar market.
- China relies on an average import tariff rate of 28.7% on the HS17 coded products (note: China's average applied rate exceeds its WTO average bound rate in this code).
    - The "out-of-quota" tariff for sugar in China was 95% in 2017, decreasing to 90% in 2018 and 85% in 2019. The current "out-of-quota" tariff is 50%.
    - All "out-of-quota" sugar imports are subject to automatic import licensing system which the government uses to monitor imports of other bulk commodities.
    - The in-quota tariff is 15% and limited to 1.945 MMT.
- 70% of all Chinese quota imports are by state-trading enterprises (STEs).
- China has essentially ended imports of sugar from Cuba due to economic collapse and unpaid debts.
- The Chinese government operates a reserve stocks program to manage supply.
- Government mandated purchase prices.

[8] See USDA. 2026. "Sugar Annual – China," Report No. CH2026-0051, Guangzhou, China (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Guangzhou%20ATO_China%20-%20People%27s%20Republic%20of_CH2026-0051.pdf).

- In addition to setting minimum cane prices several of China's provincial governments provide other assistance such as:
    - Guangxi and Yunnan provinces support this goal through subsidies and programs that promote improved planting techniques and mechanization.
    - In Guangxi, cane farmers receive government subsidies as well as financial support from millers to expand cane acreage.
- The Chinese government supports sugar consumption by restricting saccharine production to three plants monitored and inspected by the China Sugar Association (CSA).

Colombia

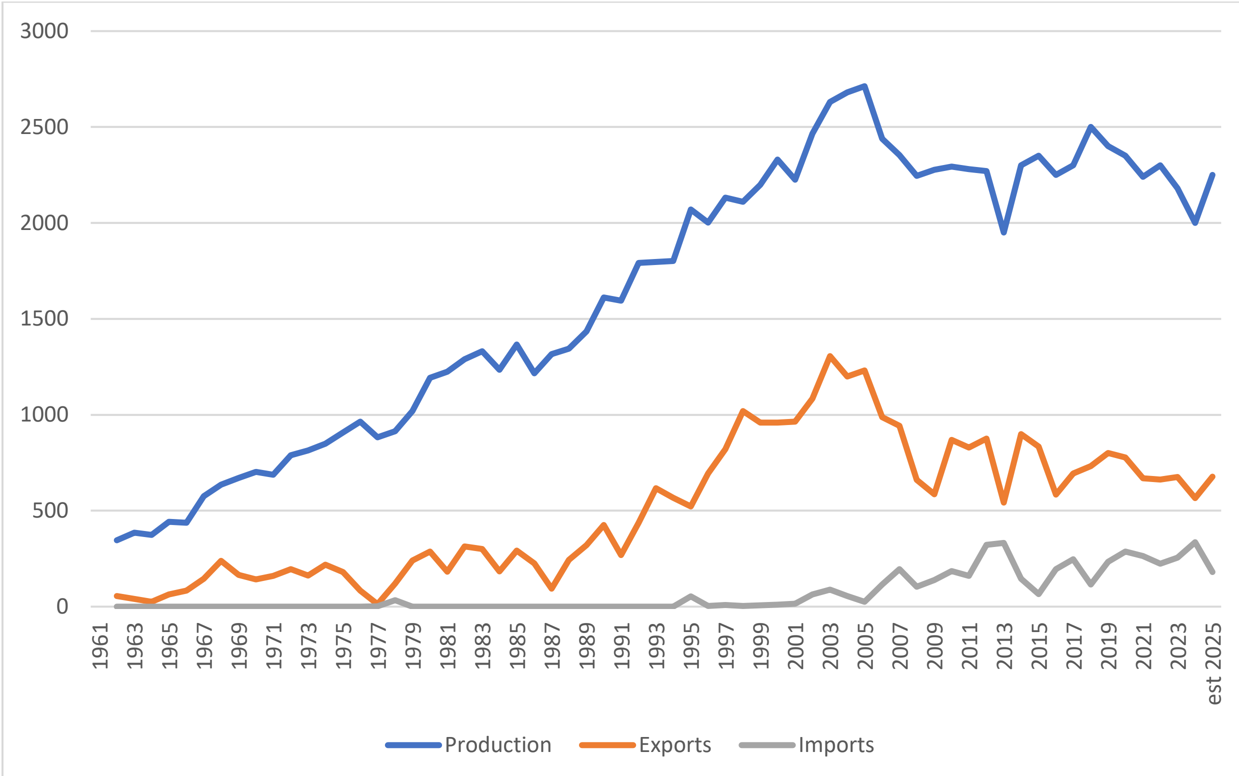

Figure 7. Colombia Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[9]

- Colombia relies almost exclusively on an average 10.6% import tariff on the HS17 coded products.
- Maintains a stable 10% ethanol blending mandate
- Since 2001 local sugar prices have been subject to the Sugar Price Stabilization Fund (FEPA) to protect local producers from fluctuations in international sugar prices.
- Sugar imports from CAN countries (i.e.- Peru, Ecuador, and Bolivia) are allowed duty free.
- Imports from non-CAN countries are subject to a 15% duty rate.
- Columbian sugar exports to CAN countries are allowed duty free.

[9] See USDA. 2026. "Sugar Annual – Colombia," Report No. CO2026-0005, Bogota, Colombia (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Bogota_Colombia_CO2026-0005.pdf).

Dominican Republic

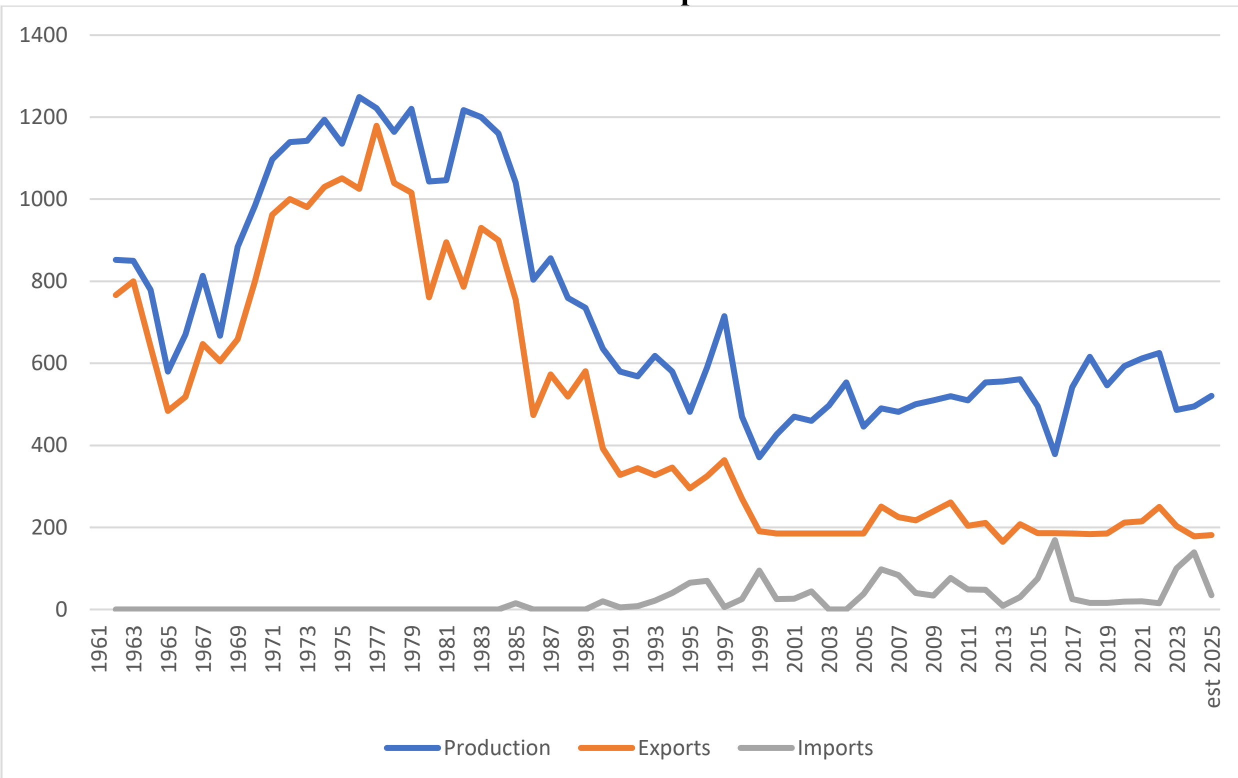

Figure 8. Dominican Republic Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[10]

- The Dominican Republic relies on an average 32.9% import tariff on the HS17 coded products.
- In-quota import duties for raw and refined sugar stand at 14% and 20%, respectively, plus an 18 percent value-added tax (VAT).
- Established 30,000 MT tariff-rate quota for sugar, which is subject to the in-quota rates, coupled with an "out-of-quota" tariff rate of 85%.
- The government sets sugar prices for both raw and refined sugar cane based on historical prices and production estimates.
- Imported ethanol also faces taxation similar to alcohol for human consumption, including the 18% VAT plus an ad valorem tax based on the percentage alcohol and weight.
- Although passed into law in 2007 an initiative aimed to establish a 10% ethanol blending requirement for gasoline and 20% biodiesel requirement for diesel blends has yet to be enacted by the executive branch.

[10] See USDA. 2026. "Sugar Annual – Dominican Republic," Report No. DR2026-0002, Santo Domingo, Dominican Republic (April; available at: https://www.fas.usda.gov/data/gain-report/2026/03/Sugar%20Annual_Santo%20Domingo_Dominican%20Republic_DR2026-0002.pdf).

Ecuador

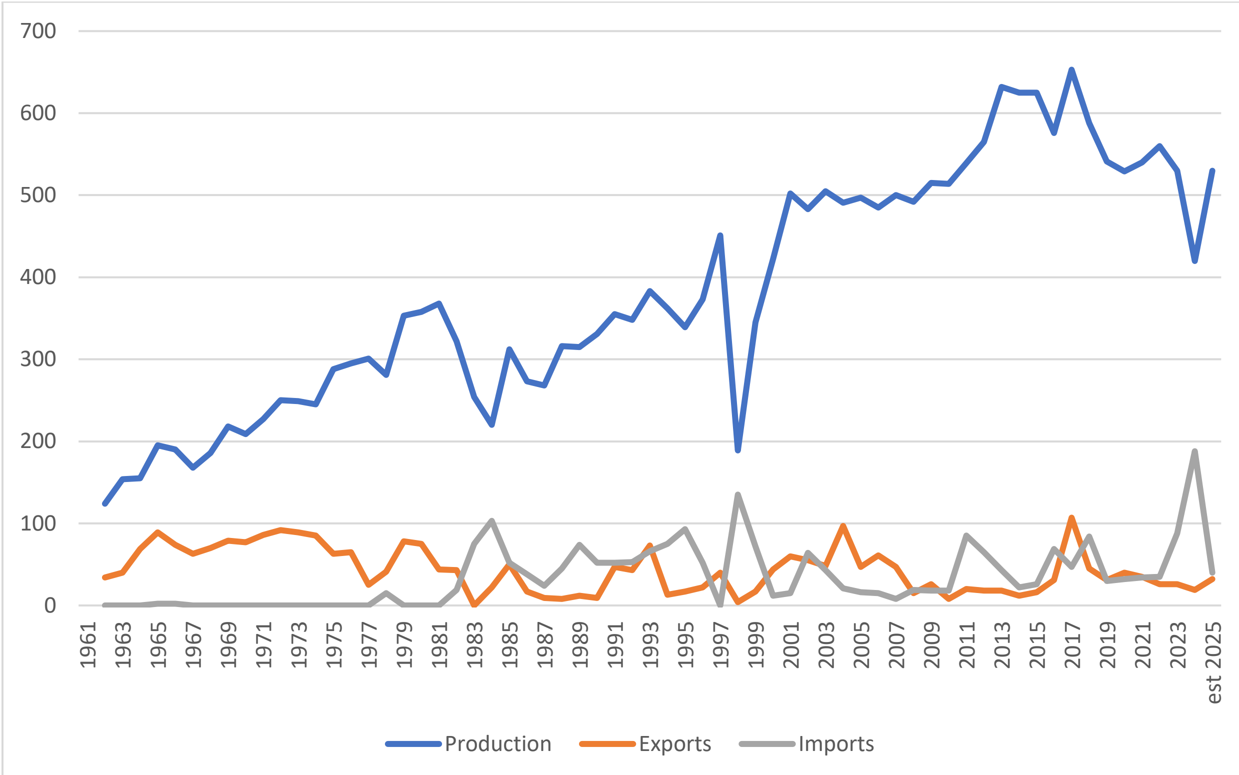

Figure 9. Ecuador Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[11]

- Ecuador maintains an average 11.1% import tariff on HS17 coded products, with a 20% tariff on raw cane and beet sugar.
- Raw and refined sugar imports are assessed at a 15% tariff plus a variable tariff under the Andean Price Band System.
- Domestic industry cannot supply the ethanol needed to comply with the 10% blend rate for ECOPAIS gasoline, opening demand for imported ethanol.
- Ethanol production sector continues to rely on state-owned oil company, PETROAMAZONAS, supplying up to 100 million liters of ethanol annually.
- COMEX Resolution 030-2-17, enacted in December 2017, terminated preferential (zero percent tariff) treatment for sugar imports from Andean Community members, Columbia, Peru and Bolivia

[11] See USDA. 2026. "Sugar Annual – Ecuador," Report No. EC2026-0002, Quito, Ecuador (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Quito_Ecuador_EC2026-0002.pdf).

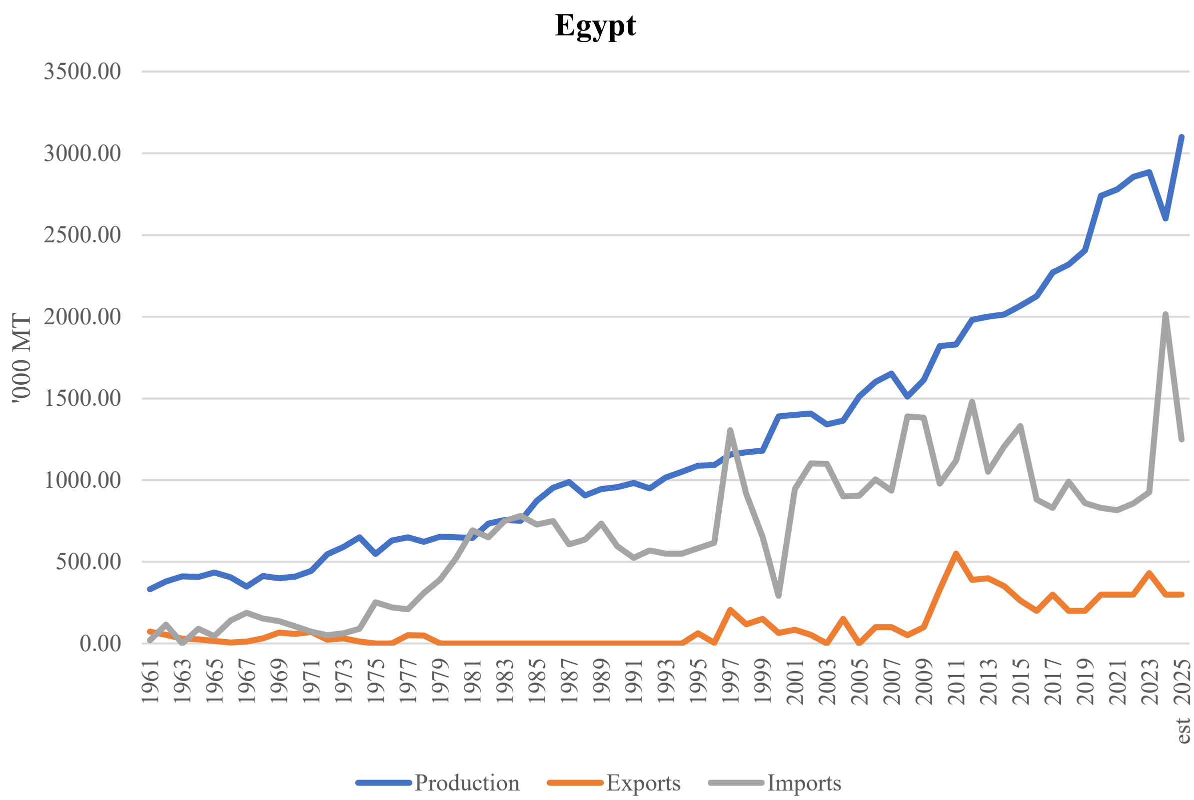

Figure 10. Egyptian Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[12]

- The government closely regulates the sugar sector and sets beet, cane, and sugar prices. The government owns four of Egypt's six beet companies, all of its cane mills, and one of its two cane refineries.
- Egypt has traditionally maintained an average HS17 applied tariff of 17.3%, but recent events have led to the suspension of raw and refined sugar import duties since 2017.
- In April 2025, and reaffirmed in March 2026, the government extended the ban on export of sugar of all kinds, although exports to several Arab and African countries is allowed through regulated channels that permit export of officially recognized surplus quantities.
- The government also maintains government-owned stockpiles to manipulate price.
- Egypt has implemented acreage controls of water intensive crops like sugarcane.
- Domestic price supports for beet and cane sugar production resulted in an estimated increase in producer profits of 143% for 2018.
- In 2025 the government increased the guaranteed prices for sugarbeets by 16%, reaching a level of $47.30 (USD) per metric ton compared to the previous season.
- For 2026 the government reversed the 2025 price increase reducing the guaranteed price for sugar beets by 16.6 percent to $38 (USD) per metric ton.

[12] See USDA. 2026. "Sugar Annual – Egypt," Report No. EG2026-0007, Cairo, Egypt (April; available at: https://www.fas.usda.gov/data/gain-report/2026/05/Sugar%20Annual_Cairo_Egypt_EG2026-0007.pdf).

- The government also supplies subsidies for financing and inputs.
- Since the 1990s, the United States has funded a research project valued at 200 million Egyptian pounds ($12 million USD) to develop disease-resistant sugarcane varieties.

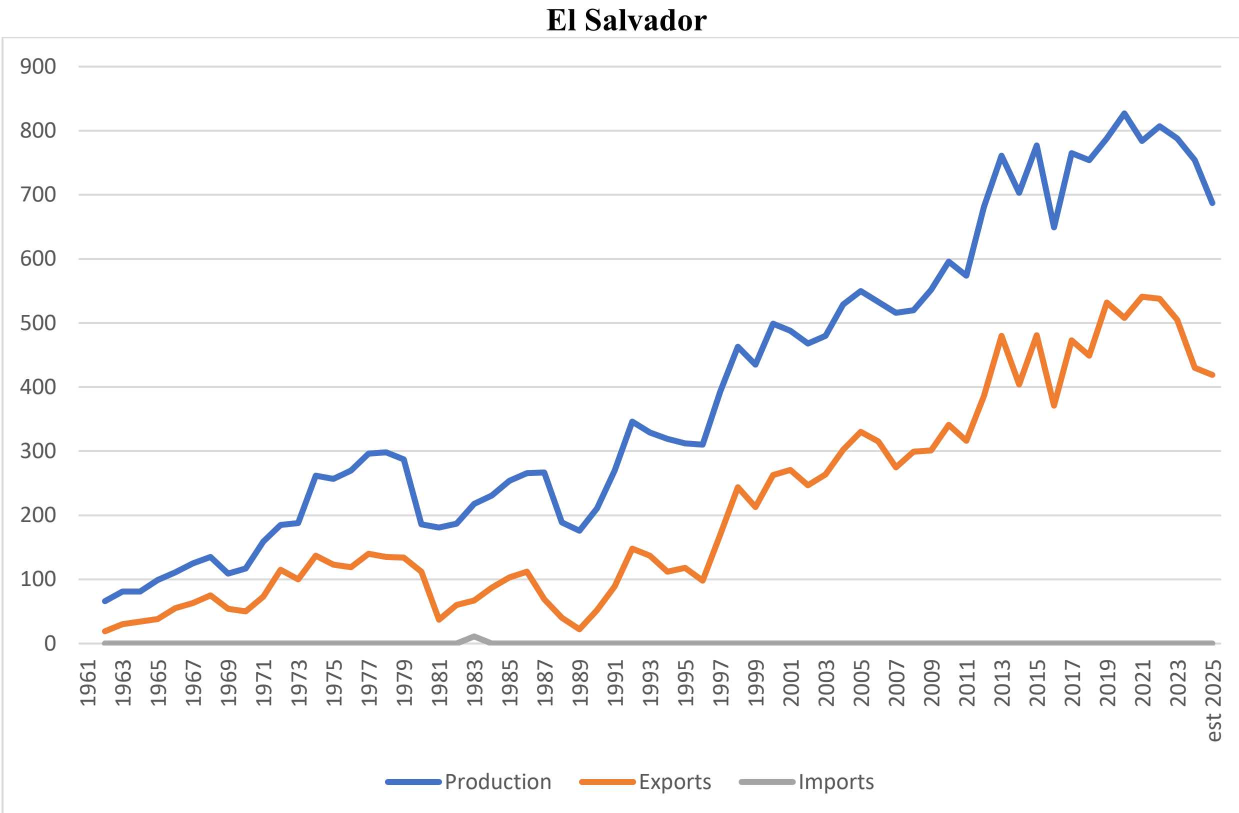

Figure 11. El Salvador Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[13]

- El Salvador imposes a 40% ad valorem import tariff on all sugar.
- The government further mandates that all sugar be fortified with vitamin A.
- The primary support provided to the industry is through limiting market access through import tariff protection.
- The sugar industry is regulated under the national sugar law, with CONSAA serving as the oversight body.

[13] See USDA. 2026. "Sugar Annual – El Salvador," Report No. ES2026-0003, San Salvador, El Salvador (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_San%20Salvador_El%20Salvador_ES2026-0003.pdf).

Eswatini

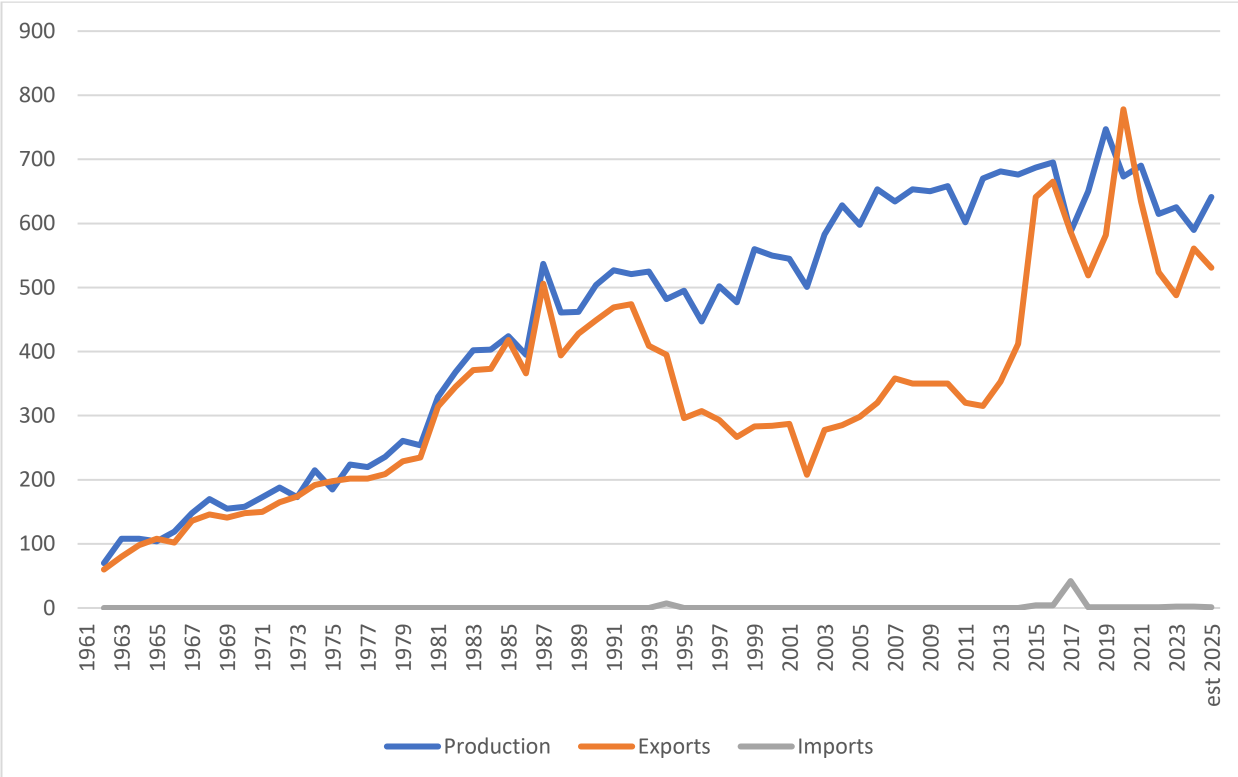

Figure 12. Eswatini Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[14]

- Eswatini imposes a low, average 3.6%, applied import tariff on the HS17 coded products, but their bound rate is 75.2%.
- The Eswatini Sugar Agreement (ESA) oversees the marketing of all raw and refined sugar. Revenue obtained from the sale of sugar and molasses is shared between growers and millers based on a process and formula guided by the Sugar Act of 1967 and the ESA.
- The ESA provides a rebate (discount) to value-added industries located within Eswatini to encourage domestic sales.
- Sugarcane growing in Eswatini is only permissible through a quota issued by the Sugar Industry Quota Board.

[14] See USDA. 2026. "Sugar Annual – Eswatini," Report No. SZ2026-0001, Pretoria, South Africa (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Pretoria_Eswatini_SZ2026-0001.pdf).

European Union

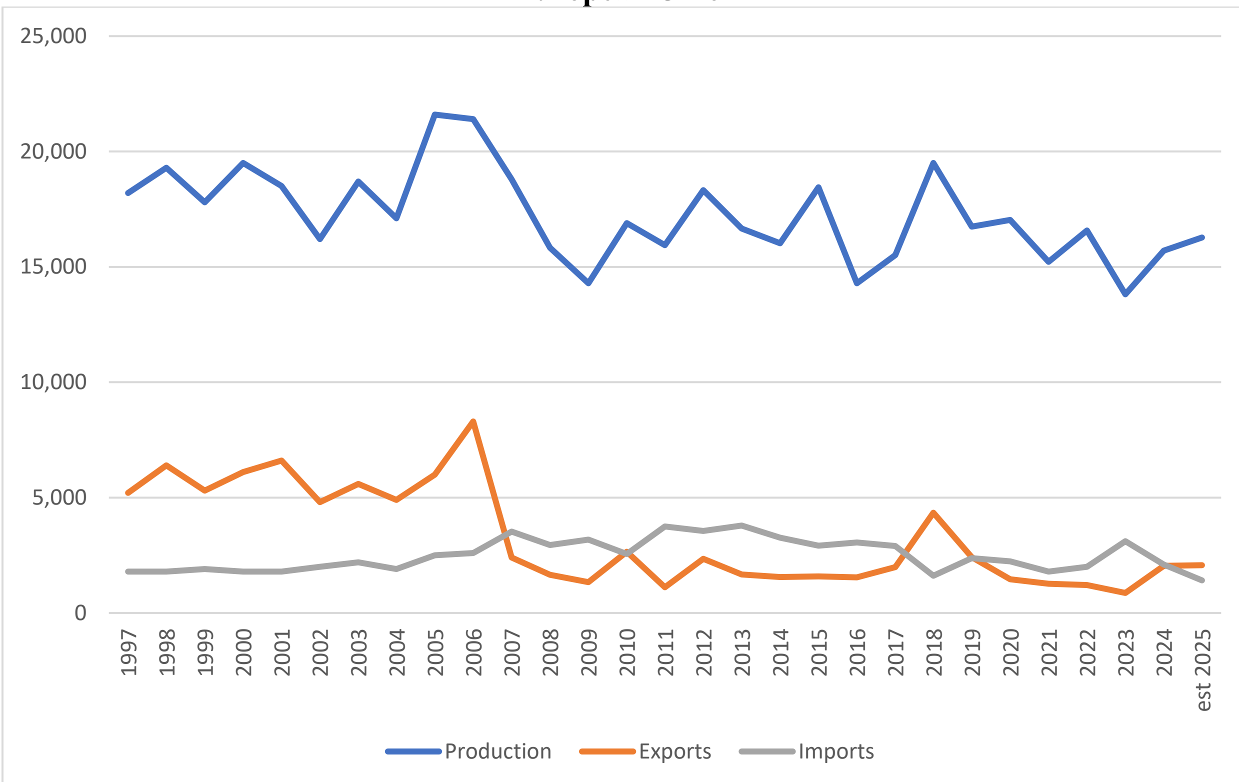

Figure 13. European Union (Starting with EU15 and adding new members as joined; EU28 figures since 2007) Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 2007-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[15]

- The EU maintains strict quotas under licensing for exports of raw and refined sugar. It also maintains an average applied tariff of HS17 products of 18.1%
- Special arrangements limit duty-free EU imports to 3.5 MMT from several developing countries.
- The EU uses decoupled and voluntary coupled payments for sugar.[16] One report estimated the value of EU coupled and decoupled supports to EU beet producers at $665 million per year.[17] These data are dated and the value is likely larger based on more countries participating in voluntary coupled support over time.
- The EU maintains a biofuels policy that continues to expand its goals for renewable fuel production.

[15] See USDA. 2026. "Sugar Annual – European Union," Report No. E42026-0032 Brussels, EU (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Brussels%20USEU_European%20Union_E42026-0032.pdf).
[16] See: https://agriculture.ec.europa.eu/farming/crops/sugar_en (accessed August 8, 2026).
[17] Patrick Chatenay, ProSunergy Ltd, "*European Union Sugar Industry Support*," Canterbury, England, August 2015.

- Private storage aid is available to certain agricultural products including sugar. Only white sugar in crystal form in bulk or in big bags of 800 kg or more showing the net weight and with a moisture content not exceeding 0.06 percent is eligible.

United Kingdom (post-Brexit)

- The United Kingdom set a post-Brexit tariff schedule effective January 1, 2021.
- UK established a Most Favored Nation (MFN) tariff for refined sugar is equal to $449/MT, while the MFN tariff for raw sugar for refining carries a $364/MT duty.

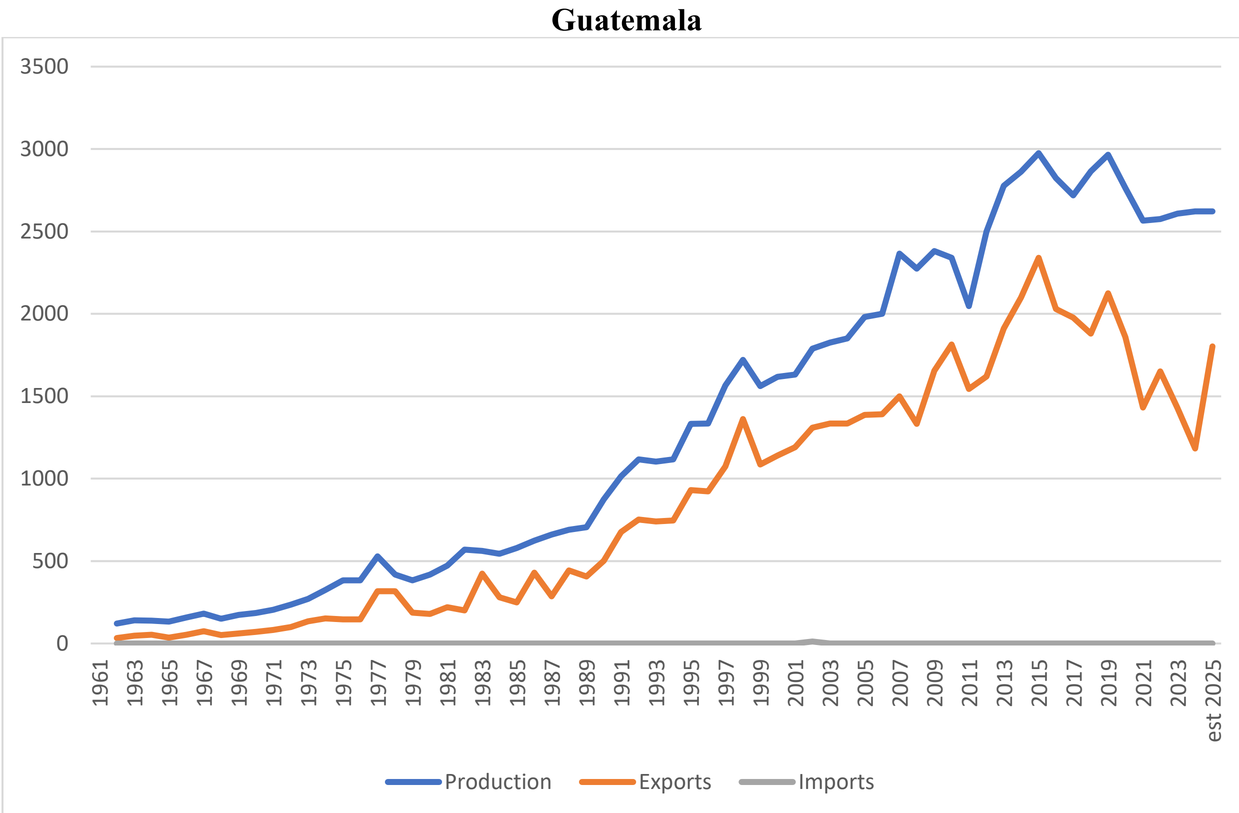

Figure 14. Guatemala Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[18]

- Guatemala imposes an average 11.7% applied import tariff on the HS17 coded products, with a 20% tariff on raw cane and beet sugar.
- The government requires fortification of sugar with vitamins (primarily vitamin A) and minerals (mainly iron).
- The government also has a 10% ethanol blend (E10) law, scheduled to begin in calendar year (CY) 2026.

[18] See USDA. 2026. "Sugar Annual – Guatemala," Report No. GT2026-0002, Guatemala City, Guatemala (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Guatemala%20City_Guatemala_GT2026-0002.pdf).

Honduras

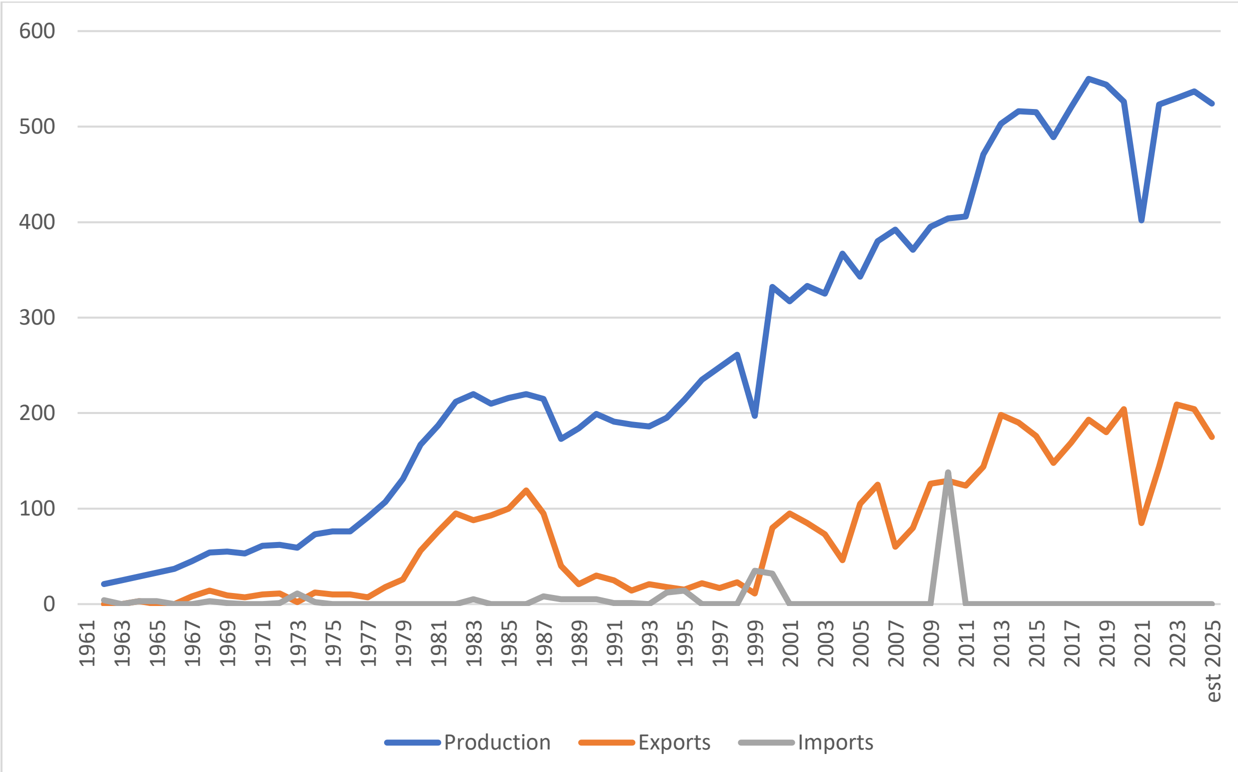

Figure 15. Honduras Production (Raw Sugar in ‘000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[19]

- Honduras imposes a low, average 13.1%, applied import tariff on the HS17 coded products, with a 40% tariff on raw cane and plantation white (standard) sugar.
- Import tariffs for raw sugar and plantation white (standard) are set between 15 and 20 percent with no additional consumption tax. Imports of refined sugar are subject to a 15 percent tariff and a 15 percent consumption tax.
- Domestic price controls require any increase in prices in the domestic market to be authorized by the government.
- All sugar for human consumption must be fortified with vitamin A.

[19] See USDA. 2026. “Sugar Annual – Honduras,” Report No. HO2026-0001, Tegucigalpa, Honduras (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Tegucigalpa_Honduras_HO2026-0001.pdf).

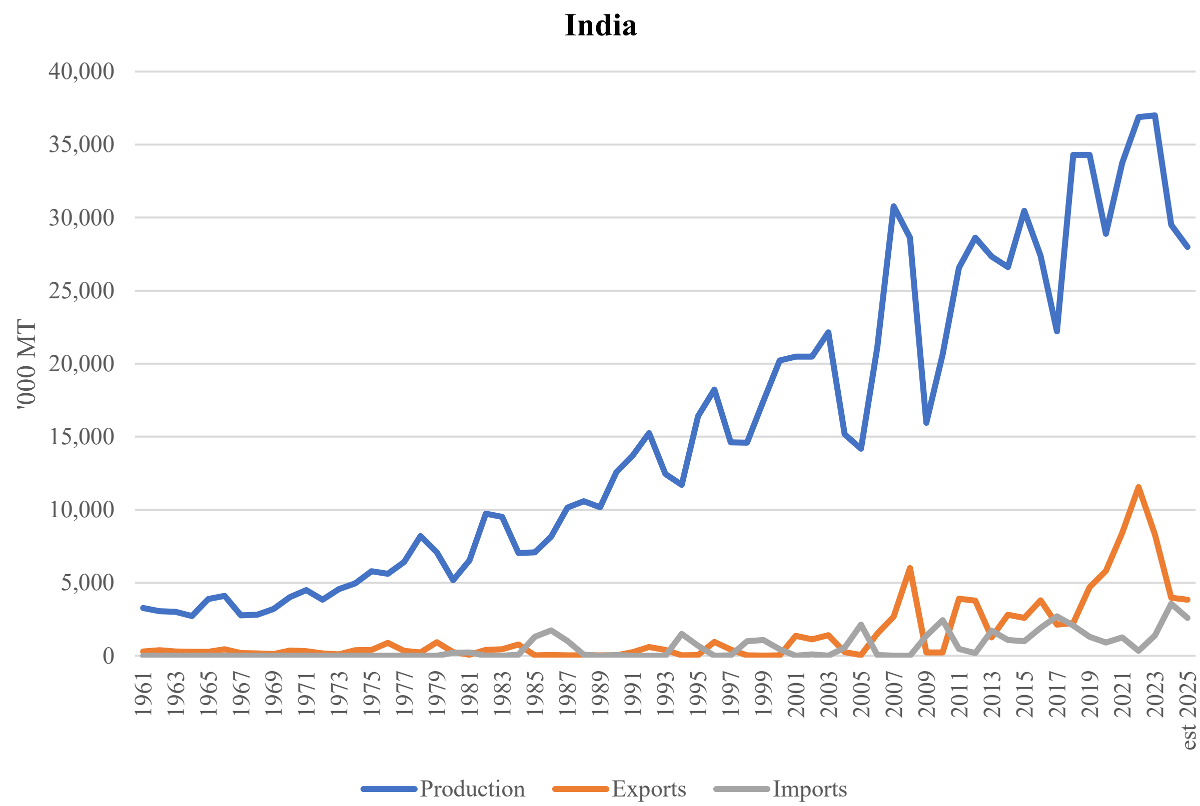

Figure 16. Indian Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[20]

- India's federal and provincial governments tightly control the sugar market, a huge source of jobs throughout rural India, and have boosted Indian cane sugar production to the largest in the world in 2018/19.
- Several countries, led by Brazil and Australia, filed a complaint with the World Trade Organization against Indian sugar production and export subsidies.[21] The WTO ruled that India has violated trade rules though India has appealed the decision.[22]
- A recent report submitted by Australia and the United States (*WTO reference symbol G/AG/W/245*) to the WTO Committee on Agriculture[23] detailed India's market price support to sugarcane over the four-year period from 2018-19 to 2021-22 and concluded India provided sugarcane AMS in excess of the current WTO limits (i.e.-10% of total value). The report noted India's Market Price Support to sugarcane reached $17.6 billion USD in 2021-22, a level that was 99.1% of the total value of sugarcane production.
- Indian provincial governments impose production controls.

[20] See USDA. 2026. "Sugar Annual – India," Report No. IN2026-0024, New Delhi, India (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_New%20Delhi_India_IN2026-0024.pdf).
[21] From WTO website https://www.wto.org/english/news_e/news19_e/ds579_580rfc_07mar19_e.htm
[22] See: https://www.wto.org/english/tratop_e/dispu_e/cases_e/ds579_e.htm (accessed August 8, 2026).
[23] From WTO website https://docs.wto.org/dol2fe/Pages/SS/directdoc.aspx?filename=q:/G/AG/W245.pdf&Open=True

- India maintains the second highest average applied tariff, among included countries, for the HS17 category of 55.7%, but has a raw sugar import duty of 100%. India has traditionally maintained an export tax but rescinded that tax in 2018.
- Government maintains strong export controls. For 2026, India announced a ban on exports of raw and refined sugar through September. For the ongoing sugar season, the Ministry of Food and Public Distribution approved exports of 2MMT of raw sugar.
- Sugar mills can import sugar duty free but must export 1 MT of sugar for every 1.05 MT of sugar imported duty free.
- India's Advance Authorization Scheme (AAS) mandates that raw sugar imports be refined at Indian port-based sugar refineries before being re-exported.
- Federal and provincial governments also supply research and development support.
- Sugar producers receive a direct price support, which is funded, at least in part, by a tax on sugar processors (the Sugarcane Development Fund). Additionally, the GOI recently approved substantial soft loans to clear excess cane stocks.[24]
- The government set Fair and Remunerative Prices (FRP) for sugarcane was set at $4.09 per quintal for MY 2024/25, based on a recovery rate of 10.25 percent. For every 0.1% variation above or below the 10.25 percent recovery rate farmers either gain or lose $3.32 per quintal.
- India has an ethanol blending program, utilizing molasses.
- In 2022 the government expedited its E-20 mandate target date from 2030 to 2025, which was met in March 2025 ahead of the November 2025 target date.
- The government is now considering a revised blending target above E-20.5.

[24] https://timesofindia.indiatimes.com/business/india-business/govt-okays-up-to-rs-10540-cr-soft-loan-to-help-sugar-mills-clear-cane-arrears/articleshow/68208612.cms

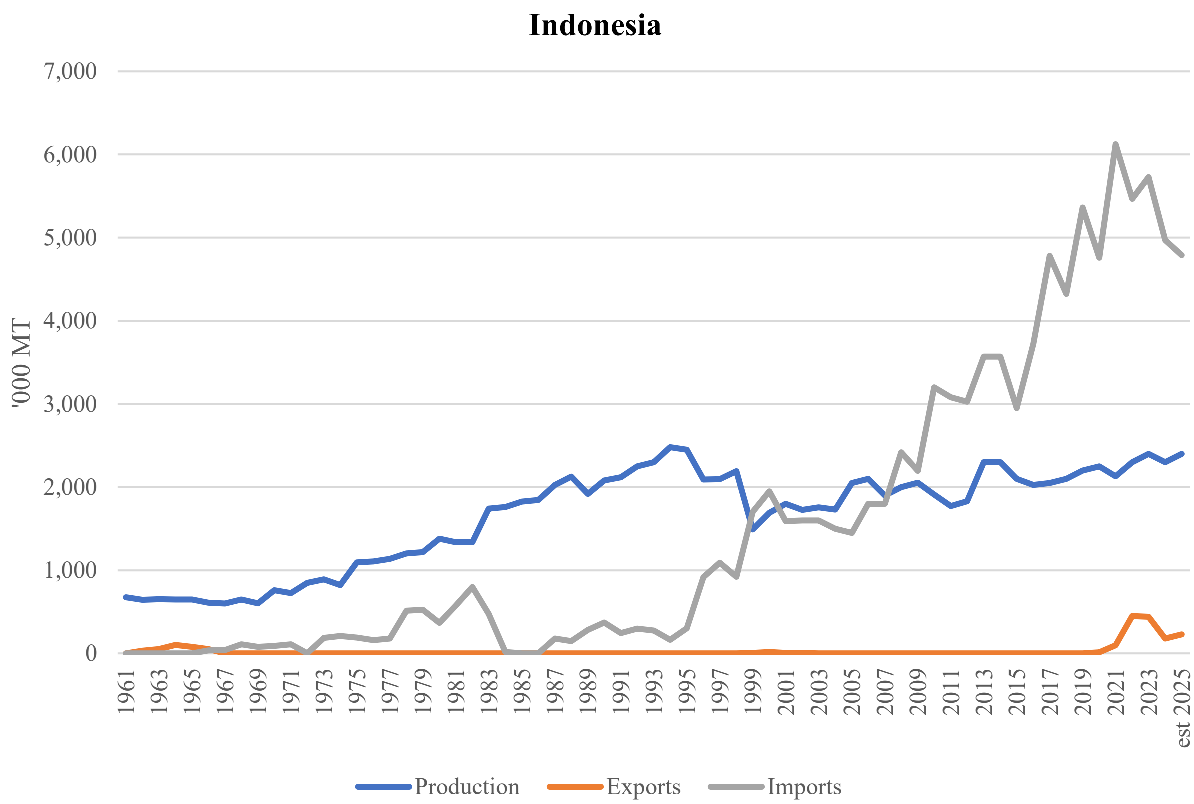

Figure 17. Indonesian Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[25]

- Indonesia's sugar sector is strictly regulated. The government controls imports, prices, and supply chains and owns a number of cane mills.
- The Ministry for State-Owned Companies allocated $324 million for the period 2014-2019 to revitalize mills under Ministry control. State-owned sugar mills are aging with 37 out of 43 being over 100 years old in 2019. Additionally, in 2018/19 three newly established state-owned sugar mills started operations with a total installed capacity of approximately 22,000 TCD (Ton Cane Day).
- Current information indicates 40 mills are administered by state-owned companies, and 19 mills are privately owned.
- Domestic production is comprised of small, stakeholder farmers (63%), private companies (27%) and state-owned enterprises (10%).
- Indonesia was the world's largest sugar importer in 2024. Imports are strictly controlled through the granting of import licenses only to state-owned companies.
- Imports of raw materials are allowed only when domestic supplies are not sufficiently available, and the government tightly controls the import volume, timing, and distribution of import quotas.

[25] See USDA. 2026. "Sugar Annual – Indonesia," Report No. ID2026-0014, Jakarta, Indonesia (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Jakarta_Indonesia_ID2026-0014.pdf).

- For 2025/26 the government issued no import allocations for white sugar due to higher expected production of domestic plantation white sugar and slightly reduced the raw sugar import allocation for refineries.
- Indonesia maintains an average applied tariff for HS17 coded products of 6.8%. In 2018, the import duty for raw sugar was approximately $0.02/lb. of sugar.
- The government sets minimum prices for sugar producers and maximum prices for consumers.
- The government may also assign state-owned companies or Indonesia's national logistics agency BULOG to sell sugar form the governments reserves, in collaboration with wholesalers, at the reference price to dampen prices.
- Refined sugar imports are allowed only with MOI authorization for food and beverage industry.
- State-owned companies procure sugar from farmers at the reference price.
- Indonesia has an ethanol program, based on the molasses by-product.

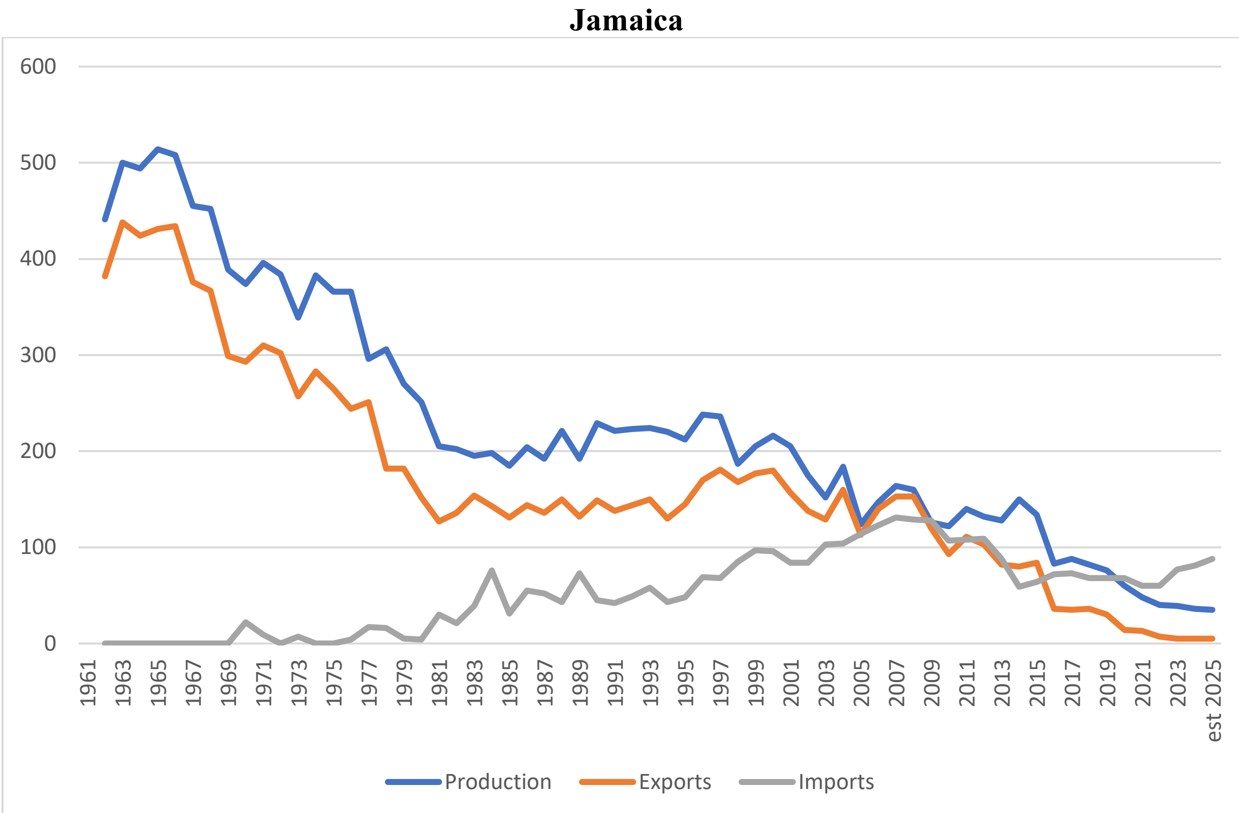

Figure 18. Jamaica Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[26]

- The government Ministry of Agriculture, Fisheries and Mining (MOAFM) oversees Jamaica's sugar industry, governing policies related to land usage, irrigation, subsidies, and pricing.
- Government of Jamaica recently announced the addition of a new state-of-the-art vertically integrated facility, called the Tropical Sugar Company.
- To support the industry, the government provides transportation subsidies, particularly to small sugarcane farmers, to offset costs associated with transporting sugarcane to factories.
- The Sugar Industry Authority (SIA) is the regulatory body that exercises oversight in areas of arbitration, research and development and monitoring and evaluation and also regulates the marketing of sugar and molasses.
- The SIA directly issues licenses to sugar factories.
- The average applied HS17 tariff rate is 20.2% (100% bound rate).

[26] See USDA. 2026. "Sugar Annual – Jamaica," Report No. JM2026-0001, Kingston, Jamaica (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Kingston_Jamaica_JM2026-0001.pdf).

Kenya

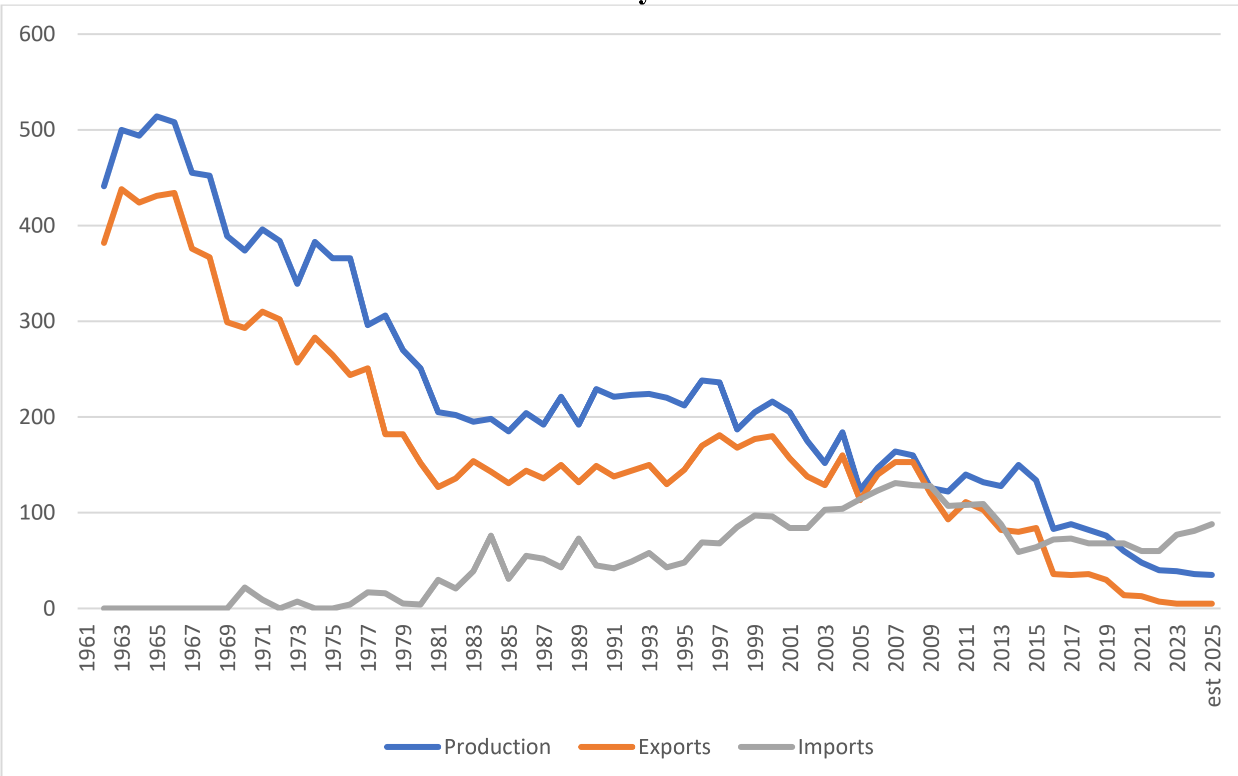

Figure 19. Kenya Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[27]

- Price for sugar cane is set each season by an industry committee comprised of government officials, millers and growers.
- Kenya's average MFN HS17 tariff is 42.4%. Sugar imports from non-COMESA and EAC countries face a 100 percent tariff, unless a specific waiver is granted by the government.
- A four percent levy charged on local and imported sugar starting in July 2025 to support infrastructure development.
- The government controls development, regulation, and promotion of the sugar industry. The Kenya Sugar Board regulates and manages the sugar industry while the Kenya Sugar Research and Training Institute assumes the sugar research functions.
- Lease agreements provide government retention of land ownership, while transferring operational control to private investors.

[27] See USDA. 2026. "Sugar Annual – Kenya," Report No. KE2026-0009, Kingston, Jamaica (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Nairobi_Kenya_KE2026-0009.pdf).

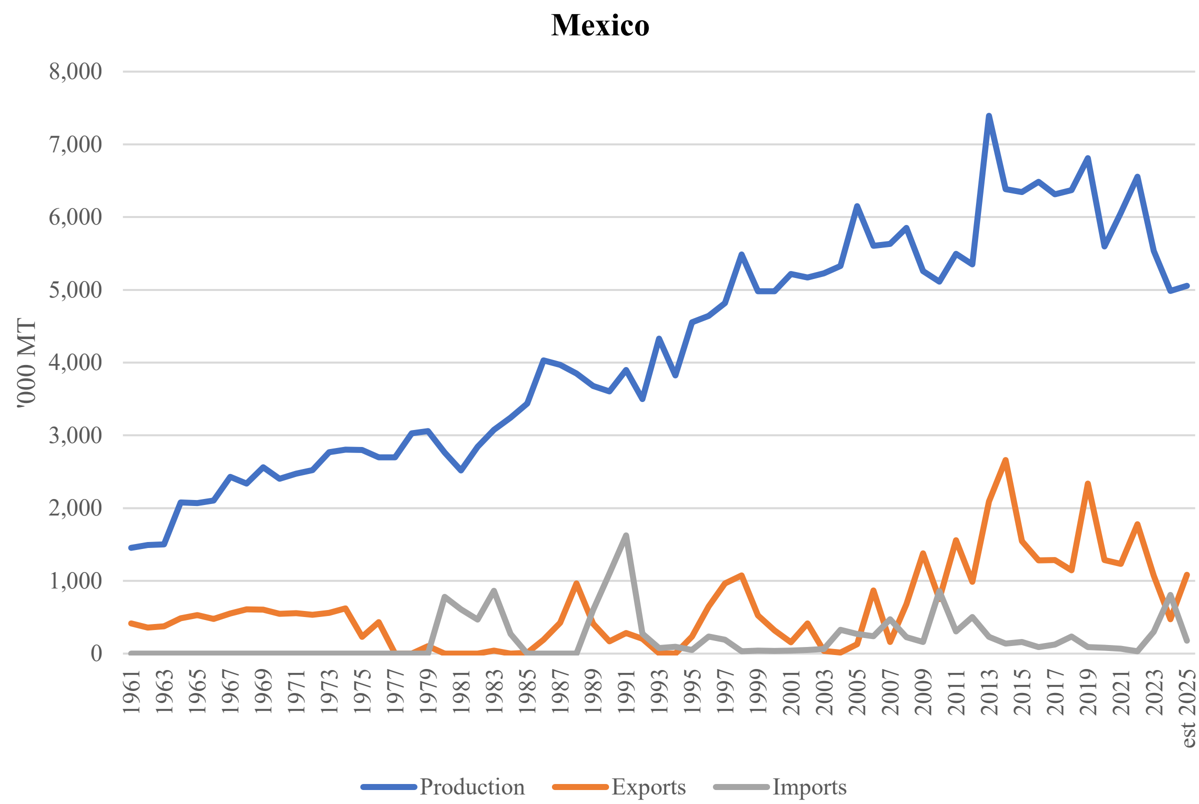

Figure 20. Mexican Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[28]

- While sugar processing is largely privately owned, the government has historically intervened heavily supporting financially struggling mills.
- In 2025 the government provided annual support of $7,300 pesos (around USD $400) per sugar producer (up to 20 hectares rainfed or up to 5 hectares irrigated) to improve crop yields and contribute to food self-sufficiency.
- CONADESUCA is the agency responsible for coordinating and executing all activities related to the sugarcane agroindustry.
- CONADESUCA also establishes the sugar reference price at which mills will purchase sugar from growers.
- In 2014, the U.S. International Trade Commission and U.S. Department of Commerce found Mexico guilty of violating U.S. trade laws in dumping subsidized sugar on the U.S. market. The U.S. government calculated subsidy and dumping margins totaling more than 80%.[29]

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[28] See USDA. 2026. "Sugar Annual – Mexico," Report No. MX2026-0025, Mexico City, Mexico (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Mexico%20City_Mexico_MX2026-0025.pdf).

[29] U.S. Department of Commerce http://enforcement.trade.gov/download/factsheets/factsheet-mexico-sugar-ad-cvd-final-091715.pdf

- U.S. International Trade Commission (USITC) five-year sunset review determined that termination of the existing suspended investigations on sugar from Mexico would likely lead to continuation or recurrence of material injury within a reasonably foreseeable time.[30]As a result of the Commission's affirmative determinations, the suspension of the antidumping and countervailing duty investigations on imports of these products from Mexico will remain in place.
- Mexico maintains import restraints with an average HS17 MFN applied tariff of 28.1%, while also having a bound tariff rate of 119.4%, the fourth highest among countries in this study that have bound tariff rates in excess of 100 percent.
- In November 2025 Mexico imposed new ad valorem (value-based) tariffs of 156 percent and up to 210 percent on sugar imports.
- Under NAFTA/USMCA rules, Mexico maintains a common external tariff of 15-16 cents/lb.
- The government sets a minimum price that the mills must pay growers for their cane, using a formula based on sugar sale prices to domestic and foreign markets.
- Mexico uses numerous indirect subsidies through preferential financing arrangements, loan guarantees for domestic sugar supplies, and funding for research and development.
- Mexico has long promulgated programs for cane ethanol use to help support the sugar sector.

[30] U.S. International Trade Commission https://www.usitc.gov/press_room/news_release/2025/er0828_67467.htm

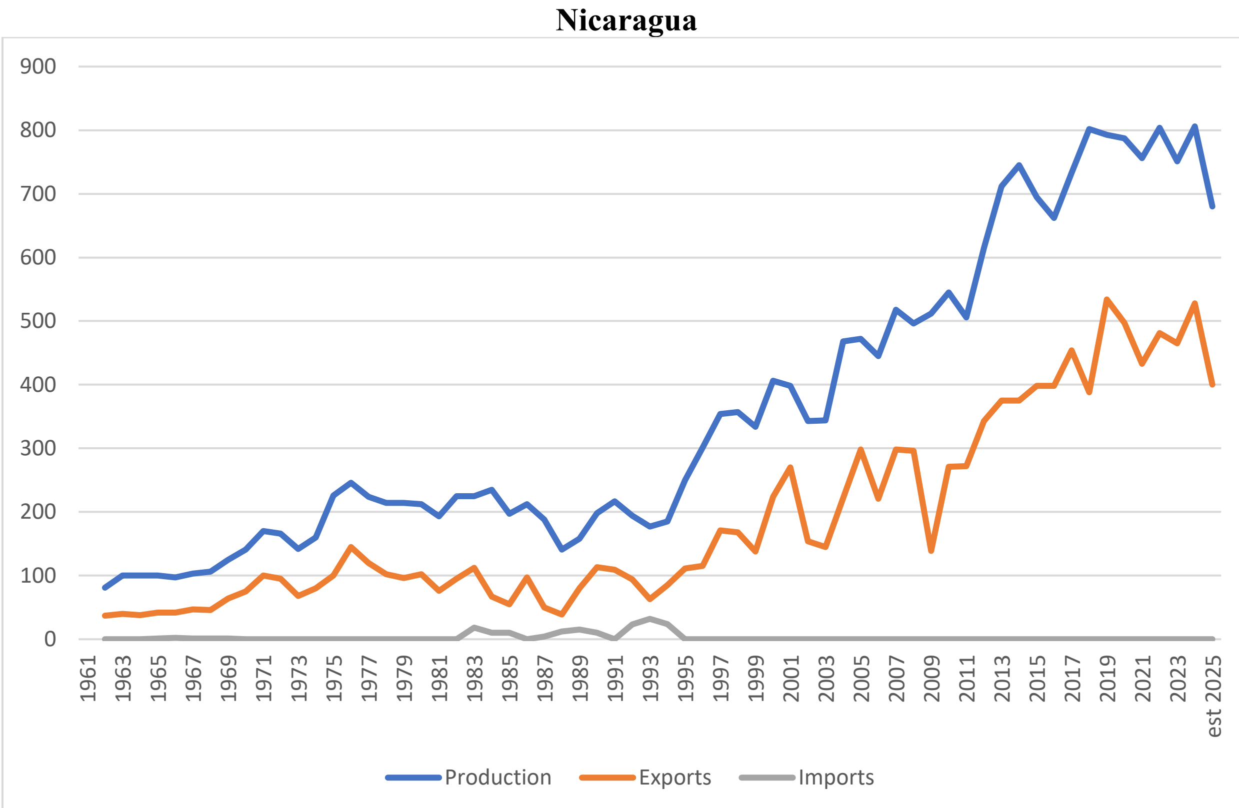

Figure 21. Nicaragua Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[31]

- Nicaragua has an average applied HS17 MFN tariff of 30.0%.
- The sugar industry benefits from relatively high domestic prices as a result of high tariffs on imported sugar.
- All sugar in Nicaragua is enriched with vitamin A.
- In 2019 the government of Nicaragua instituted a 15 percent value added tax to sugar sales.

[31] See USDA. 2026. "Sugar Annual – Nicaragua," Report No. NU2026-0002, Managua, Nicaragua (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Managua_Nicaragua_NU2026-0002.pdf).

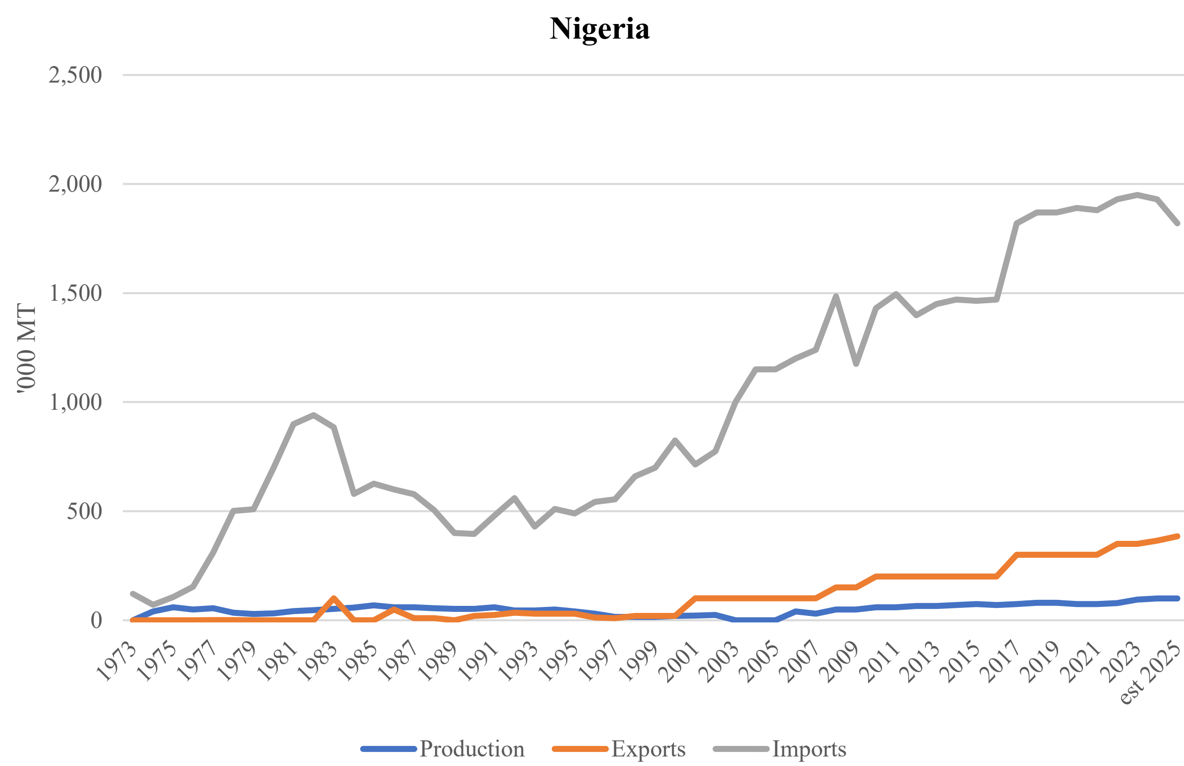

Figure 22. Nigerian Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1973-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[32]

- Nigeria primarily uses import duties for price support.
- The average applied HS17 MFN tariff is 12.6%. Nigeria has the highest bound tariff rate of the included countries at 150%.
- The government distributes annual raw sugar import permits based on company implementation of their backward integration plan.
- However, import duty on refined sugar is about 20%, and when coupled with the development levy (50%) and the VAT (7.5%), the effective import duty on refined sugar is about 35%. Imports of raw sugar have a 20% duty, 50% development levy, and the additional 7.5% VAT.
- Government allows raw sugar imports but prohibits import of refined sugar to protect the domestic industry.
- The government also uses a suite of input subsidies such as low duties on machinery, chemical, interest rate subsidies, and equipment for sugar processing.
- The government aims to produce around 1.7 to 1.8 MMT of sugar a year, providing 300,000 ha of irrigated land in nine states, and onboarding new sugar mills and refineries.

[32] See USDA. 2026. "Sugar Annual – Nigeria," Report No. NI2025-0004, Lagos, Nigeria (April; available at: https://www.fas.usda.gov/data/gain-report/2025/04/Sugar%20Annual_Lagos_Nigeria_NI2025-0004.pdf).

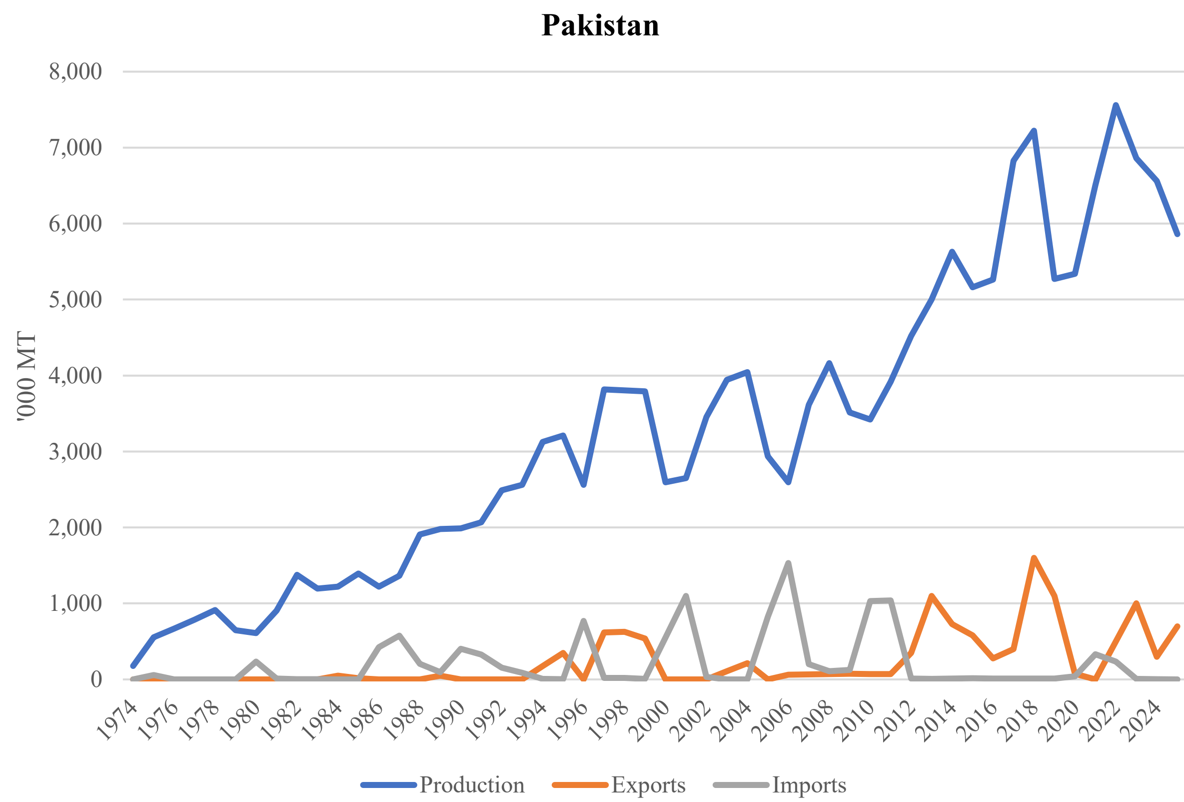

Figure 23. Pakistani Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1974-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[33]

- Pakistan has an average applied tariff for the HS17 category of 15% according to the WTO; but the general duty on sugar imports was set at 40% in April 2018 along with a 15% regulatory duty, a 15% general sales tax, and a 1% excise duty on raw sugar imports.
- Pakistan controls and subsidizes sugar exports. The government set a minimum export price of $425/ton and operated an export quota which was expanded to 500,000 MT in 2017/18 and provided an inland freight subsidy of $97/MT for sugar exports.
- Pakistan sets a notional price ceiling for prices although prices remained above that level in 2025. Provincial governments have authority to set minimum prices for sugar. In 2025 only the Sindh province exercised that authority to set a minimum sugarcane price of 425 rupees per 40 kg (approximately $38 per ton).
- Provincial governments also support sugar research and development, farmer training, and new technology transfer.

[33] See USDA. 2026. "Sugar Annual – Pakistan," Report No. PK2026-0005, Islamabad, Pakistan (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Islamabad_Pakistan_PK2026-0005.pdf).

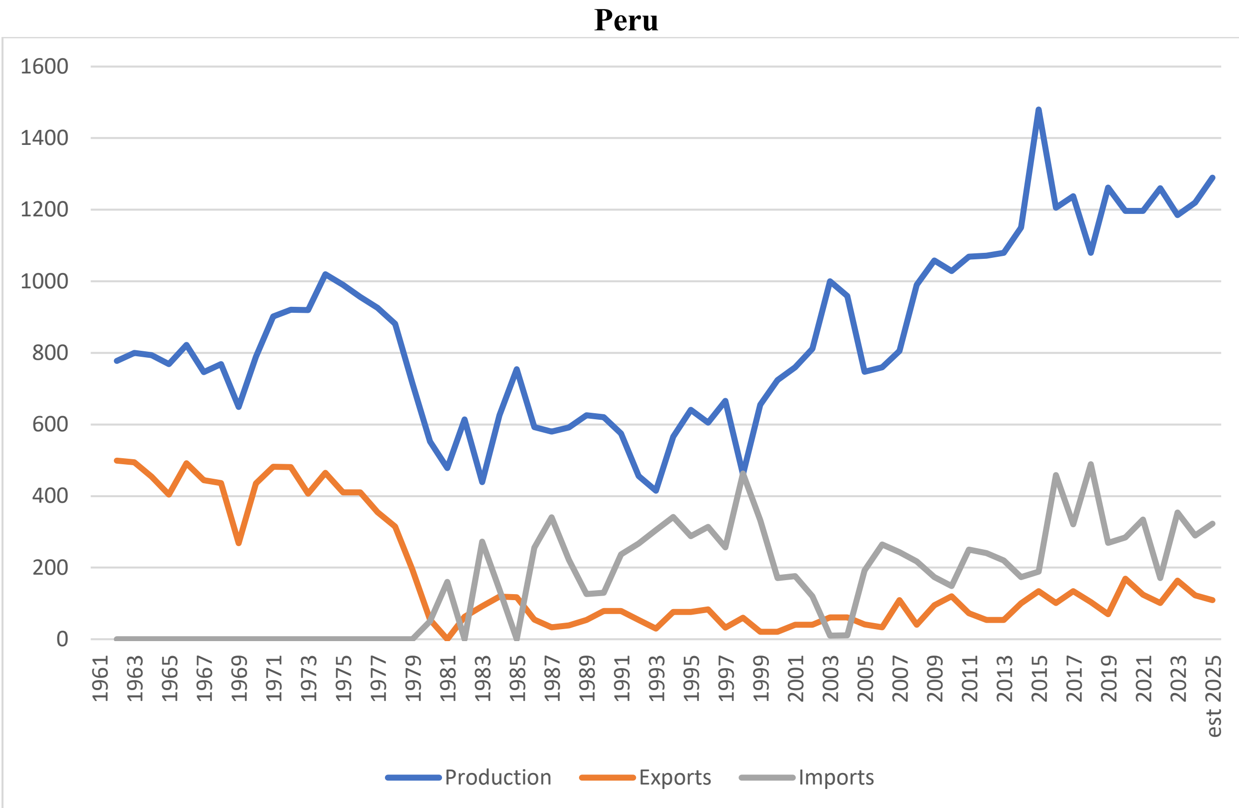

Figure 24. Peru Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[34]

- Peru has an average applied tariff for the HS17 category of 0.7% according to the WTO.
- The Government of Peru owns shares in two sugar mills.
- Sugar is part of the Peruvian Price Band System (PPBS), which has a current floor price of $518 and a ceiling price of $644.

[34] See USDA. 2026. "Sugar Annual – Peru," Report No. PE2026-0006, Lima, Peru (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Lima_Peru_PE2026-0006.pdf).

Philippines

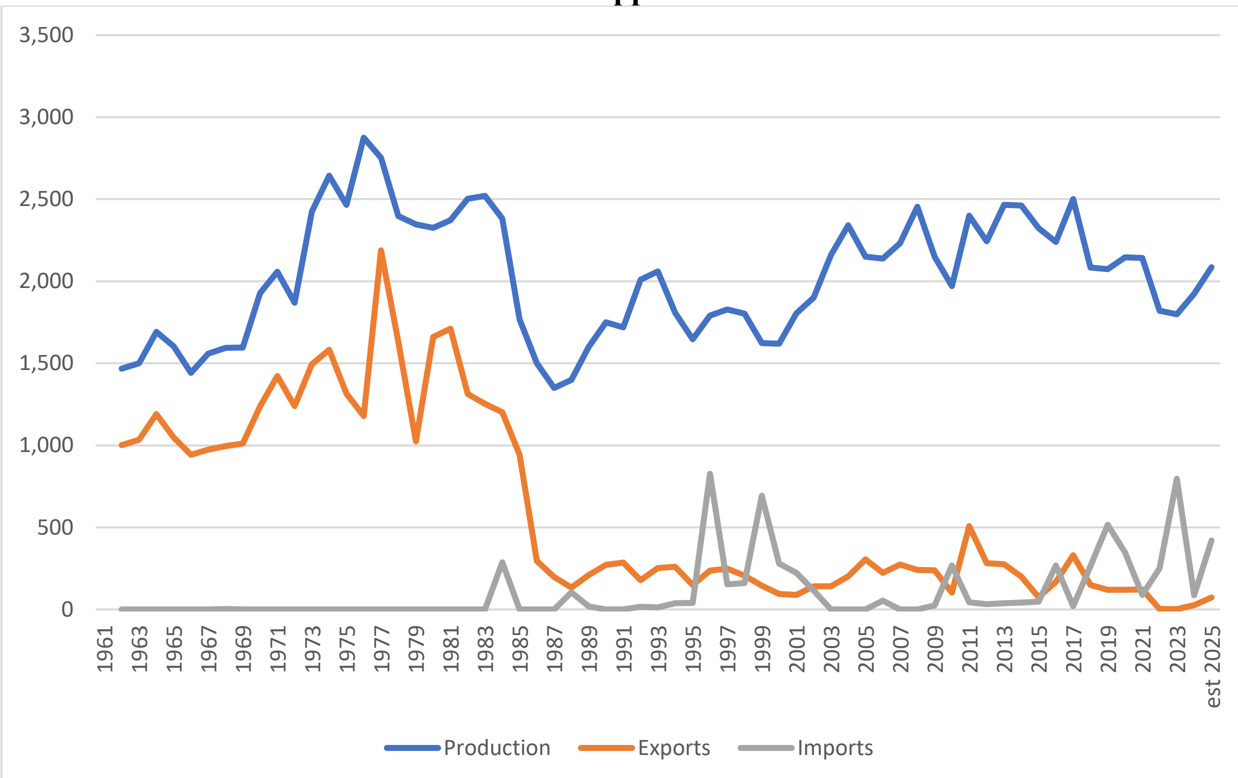

Figure 25. Philippines Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[35]

- Philippines has an average applied tariff for the HS17 category of 19.1% according to the WTO. Raw sugar imports have a tariff rate of 50 percent. All importation in excess of the MAV is subject to a tariff rate of 65 percent.
- The government's SRA (Sugar Regulatory Administration) imposes clearance fees of PhP3/LKG on ($0.05/LKG) on imported sugar and alternatives.
- The government has set MY 2026 exports at zero while waiting for SRA's policy on sugar export next marketing year.
- The SRA is mandated to balance domestic production and the country's sugar requirement by allocating how much production goes to the domestic and export markets, as well as reserves. In 2025/26 SRA allocated all production for the domestic market or "B" sugar, with none classified as "A" sugar for the U.S. market.

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[35] See USDA. 2026. "Sugar Annual – Philippines," Report No. RP2026-0013, Manila, Philippines (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Manila_Philippines_RP2026-0013.pdf).

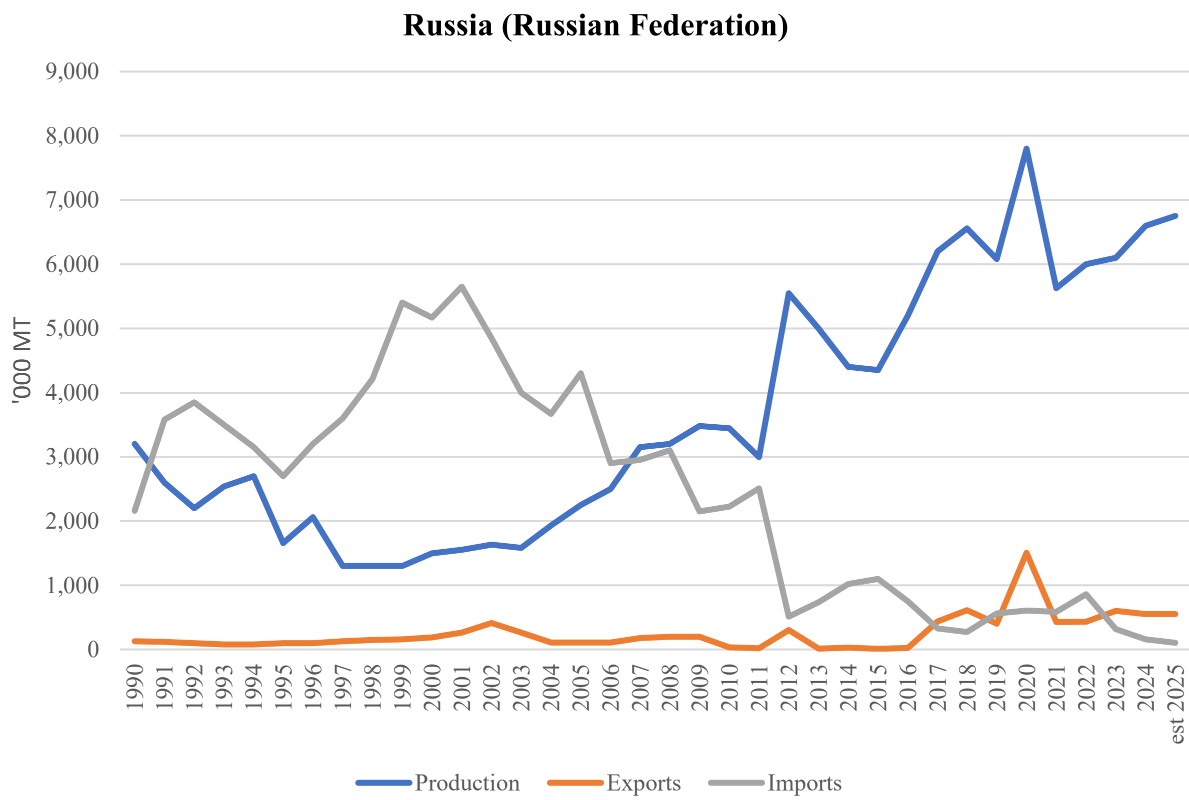

Figure 26. Russian Federation Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1990-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[36]

- Russia had been a major sugar importer, but government programs to increase sugar beet planting resulted in a sharp rise in Russian sugar production over the past decade.
- Russia's limited budget means that almost all sugar policy is based on import tariffs. As of 2017, Russia maintained a $250/MT duty on sugar imports from inside the customs union.
- Russia maintains a system of subsidized interest rate loans to agricultural producers through commercial banks.
- Russia provides seed, fuel, fertilizer, and machinery subsidies.[37]

[36] See Chatenay, P.H. and S. Gudoshnikov. 2021. "Russia's Sugar Industry: Transformation with Government Intervention," ProSunergy Report, Canterbury, UK (available online at: https://sugaralliance.org/wp-content/uploads/2023/02/Chatenay-Gudoshnikov-Russias-Sugar-Industry-6-21.pdf) and USDA. 2018. "Sugar Annual – Russian Federation," Report No. RS1812, Moscow, Russia (April; available at: https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Sugar%20Annual_Moscow_Russian%20Federation_4-19-2018.pdf).
[37] See article at: https://www.agroinvestor.ru/technologies/news/31349-kuban-oplatit-70-zatrat-na-semena-sakharnoy-svekly/

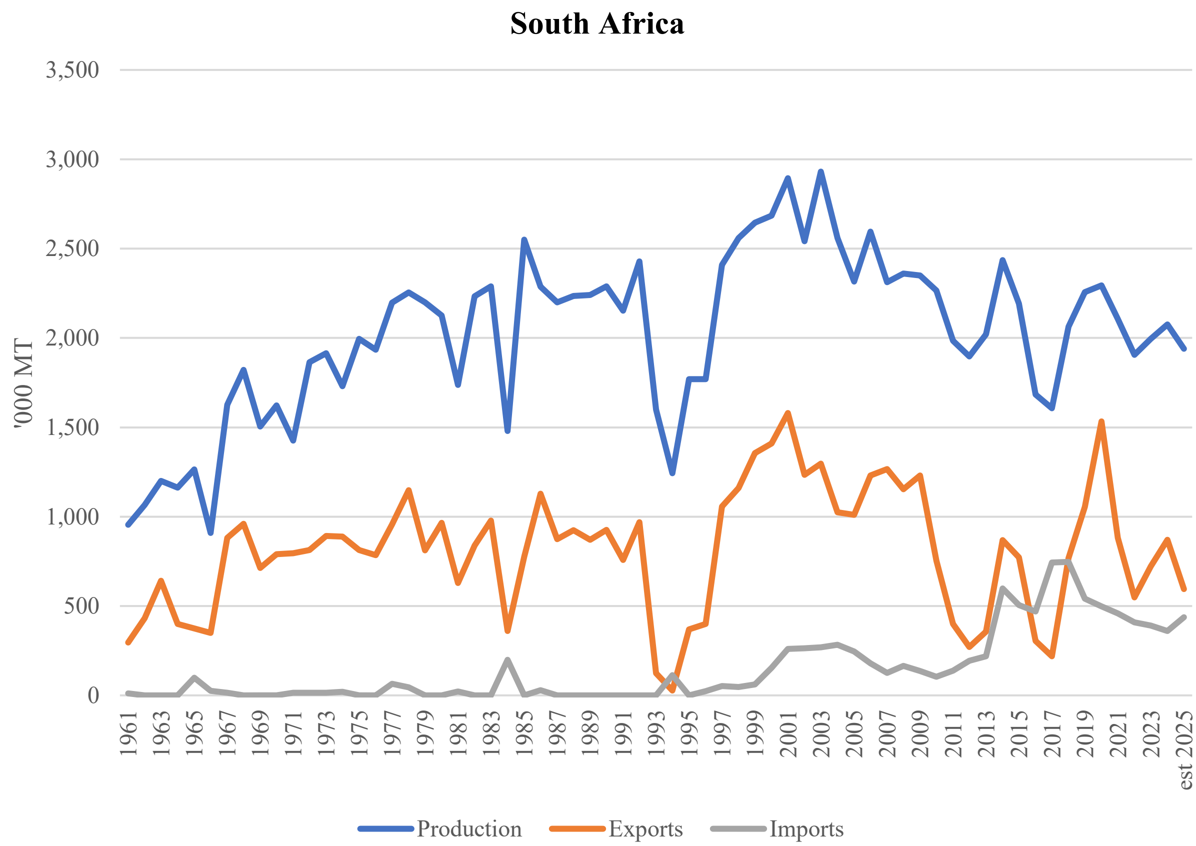

Figure 27. South African Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[38]

- South Africa uses a variable rate tariff based on world market prices rather than a fixed percentage tariff. Currently the average applied import tariff rate is 3.6%.
- South Africa imposes a tariff on imports to protect the domestic sugar industry against low world sugar prices using a variable tariff formula to determine an applied tariff.
- In 2018 the rate was approximately $0.07/lb. of imported sugar. The government uses a dollar-based reference price to formulate the duty, which was $0.28/lb in 2018.
- The current tariff of R2,349 ($129.15)/MT was applied on August 8, 2024, and has not been adjusted.
- The South African Sugar Association (SASA) is a State Trading Enterprise (STE) and maintains complete control over exports. Producers are indirectly supported by the monopoly profits arising from the export STE.

[38] See USDA. 2026. "Sugar Annual – South Africa," Report No. SF2026-0013, Pretoria, South Africa (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Pretoria_South%20Africa%20-%20Republic%20of_SF2026-0013.pdf).

- SASA is by law the only organization permitted to export raw sugar produced in South Africa.
- South Africa always exports surplus raw sugar, regardless of the global prices and sometimes at a loss, because domestic sugar regulations stipulate that the price paid to sugar cane growers should be based on revenue obtained from the sugar sales.
- The sugar industry provides a rebate to domestic manufactures to promote the sale and use of locally produced sugar.
- The government applies a dollar-based reference price (DBRP) mechanism to ensure that, inclusive of the duty, the DBRP (currently $680 per ton) is the lowest price that an importer will pay for imported sugar.
- The government set a goal for the period ended March 2023 (Phase 1) to increase domestic use of sugar to at least 300,000 MT by having local manufacturers prioritize South African sugar instead of imports to make their products. That target is revised upward in MY 2025/26 with new regulations. Phase 2 includes price restraints on cane and sugar producers and local procurement commitments, to boost domestic sales.

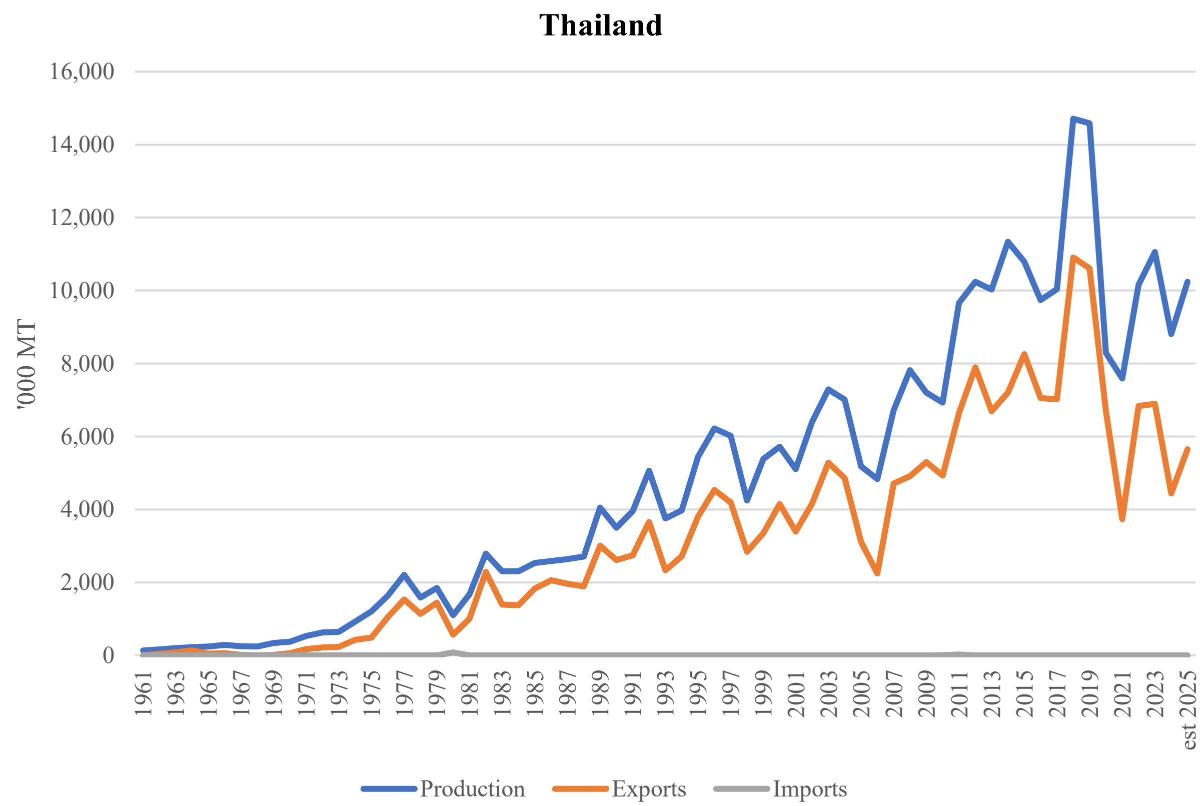

Figure 28. Thai Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[39]

- Government programs boosted Thai sugar production and exports enormously over the past decade, and Thailand is now second only to Brazil in sugar exports. One study placed the value of Thai government support for its sugar industry at $1.3 billion per year.[40]
- Brazil filed a WTO case against Thailand, but that case was settled in 2024 under mutually agreed terms.
- Thailand has set a sugar-import duty of $0.05/lb. of sugar, but imports from other ASEAN countries are exempt.
- Thailand traditionally maintained price controls over sugar, but in 2018, all prices were liberalized.
- In 2025 the cabinet approved the minimum price of sugarcane, which was set at 1,160 baht/MT ($34.21).
- In 2018 domestic sugar wholesale prices were approximately 5 baht per kilogram (7 cents/lb) higher than the world sugar price, but the Thai government provided a

[39] See USDA. 2026. "Sugar Annual – South Africa," Report No. TH2026-0011, Bangkok, Thailand (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Bangkok_Thailand_TH2026-0011.pdf).
[40] Antoine Meriot, Sugar Expertise LLC, "*Thailand sugar policy: Government drives production and export expansion*," Bethesda, Maryland, June 2015. https://sugaralliance.org/project/thailands-sugar-policy-government-drives-production-and-export-expansion

production cost subsidy of 50 baht per metric ton ($1.6/MT; a maximum of 5,000 metric tons per farmer), as well as direct payments of 53 baht per metric ton ($1.7/MT) from the state-run Cane and Sugar Fund.

- The government imposes a $0.07/lb tax on domestic sugar at the mill level to fund the Cane Sugar Fund, which provides income support to domestic cane sugar producers. Although Thailand has repeatedly said they would eliminate domestic support, this program has remained in place.
- Since June 2021 green harvesting incentives provide a price premium at sugar mills for growers who do not burn during harvest.

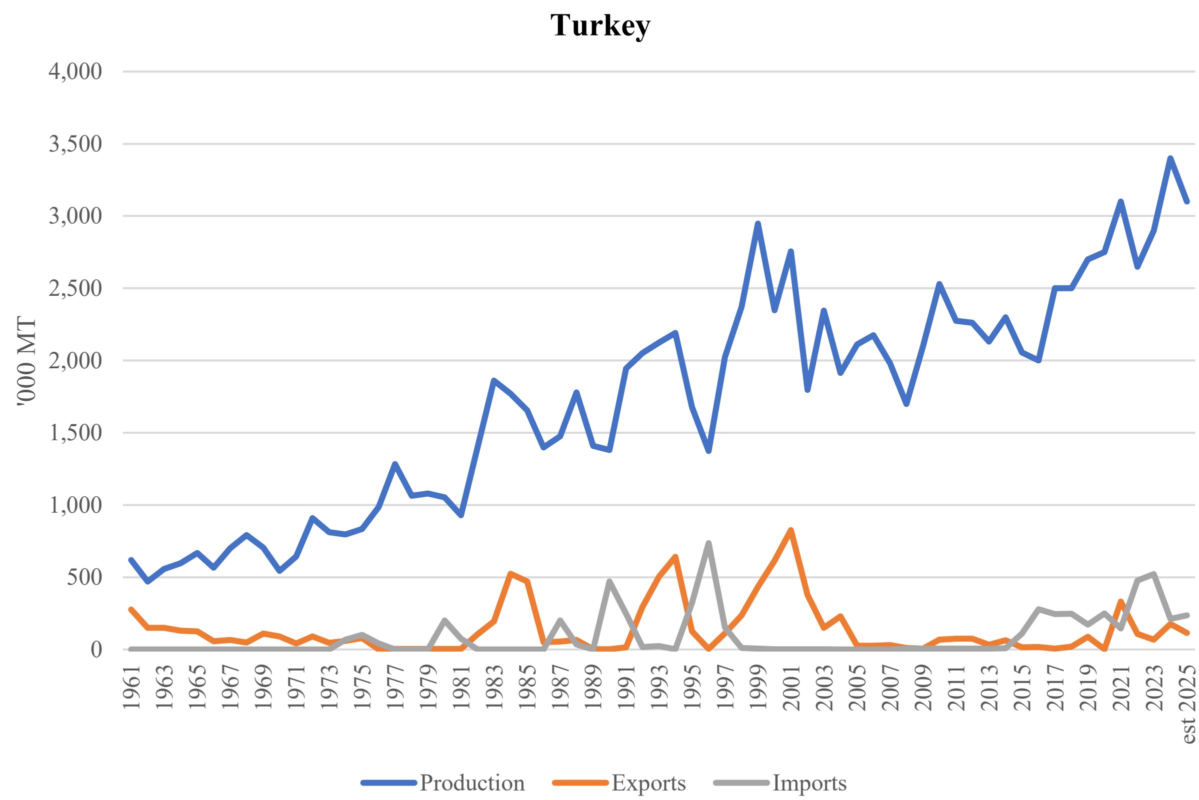

Figure 29. Turkish Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[41]

- As previously noted, Turkey is one of the highest subsidizing countries in the world on sugar based on direct transfers and border policies. Their average MFN applied tariff for the HS17 code is 99.5%, but their applied rate for raw sugar imports is 135% as of 2016.
- The Inward Processing Regime (IPR) allowed duty-free imports as long as the product was used in a food and beverage product for export. In May 2025 the IPR was suspended and the Ministry of Trade encouraged processors to purchase domestic sugar.
- A Turkish government entity, (TURKSEKER) is the country's biggest sugar producer, owning 15 factories accounting for 30% of Turkish production. Turkseker, on behalf of the government, typically announces the annual purchase price for sugar ahead of planting.
- The government provides a myriad of input subsidies, such as fertilizer and fuel, and provides direct income/price support and insurance programs.
- Turkey uses production quotas to manage internal supplies. The government sets production quotas and fixes certain prices. The Sugar Department under the Ministry of Agriculture and Forestry (MinAF) regulates and monitors the market.
- Export of starch-based sugar (SBS) has increased as the government gradually reduced the amount companies can sell on the domestic market.

[41] See USDA. 2026. "Sugar Annual – Turkiye," Report No. TU2026-0015, Ankara, Turkiye (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Ankara_Turkiye_TU2026-0015.pdf).

- Exported limited volumes of sugar because Turkish sugar is not competitively priced vis-à-vis other international suppliers.
- Although Turkey has been phasing out/privatizing the government-owned sugar mills, those mills received subsidies estimated at as much as $250 million per year.[42]
- Turkey requires 3% bioethanol in its gas fuel and sugar beet molasses is one of the feedstocks used to meet that requirement.

[42] Burell, A. and M. Kurzweil. "Distortions to Agricultural Incentives in Turkey." World Bank and Wagenigen University Working Paper 10, 2007. http://siteresources.worldbank.org/INTTRADERESEARCH/Resources/544824-1146153362267/Turkey_0208.pdf

Ukraine

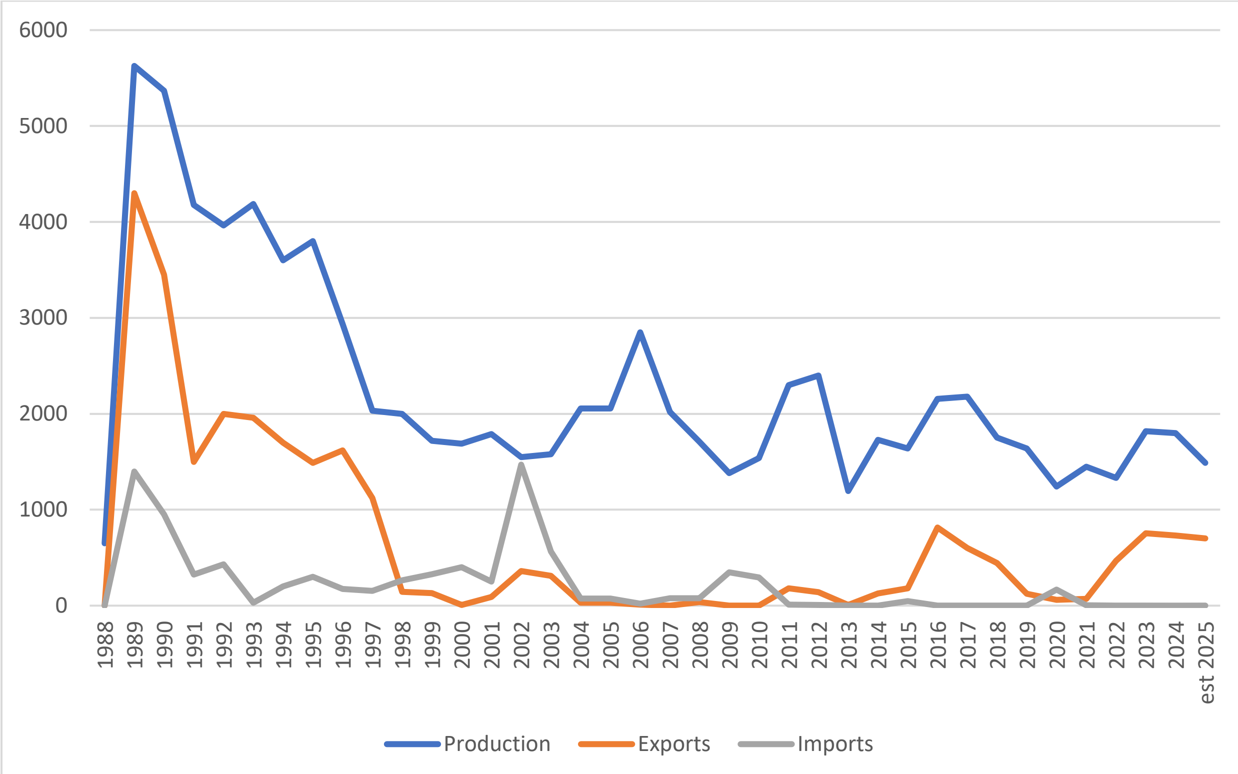

Figure 30. Ukraine Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1988-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[43]

- Ukraine has an average applied tariff for the HS17 category of 19.4% according to the WTO. The government also maintains an import duty of 50 percent on all sugar imports, raw and processed.
- The government maintained an export quota for sugar at 107,238 MT to the EU for CY2025. For CY2026 the quota was divided among 16 sugar producers in proportion to their CY2025 production volumes.

[43] See USDA. 2026. "Sugar Annual – Ukraine," Report No. UP2026-0014, Ankara, Turkiye (April; available at: https://www.fas.usda.gov/data/gain-report/2026/05/Sugar%20Annual_Kyiv_Ukraine_UP2026-0014.pdf).

Venezuela

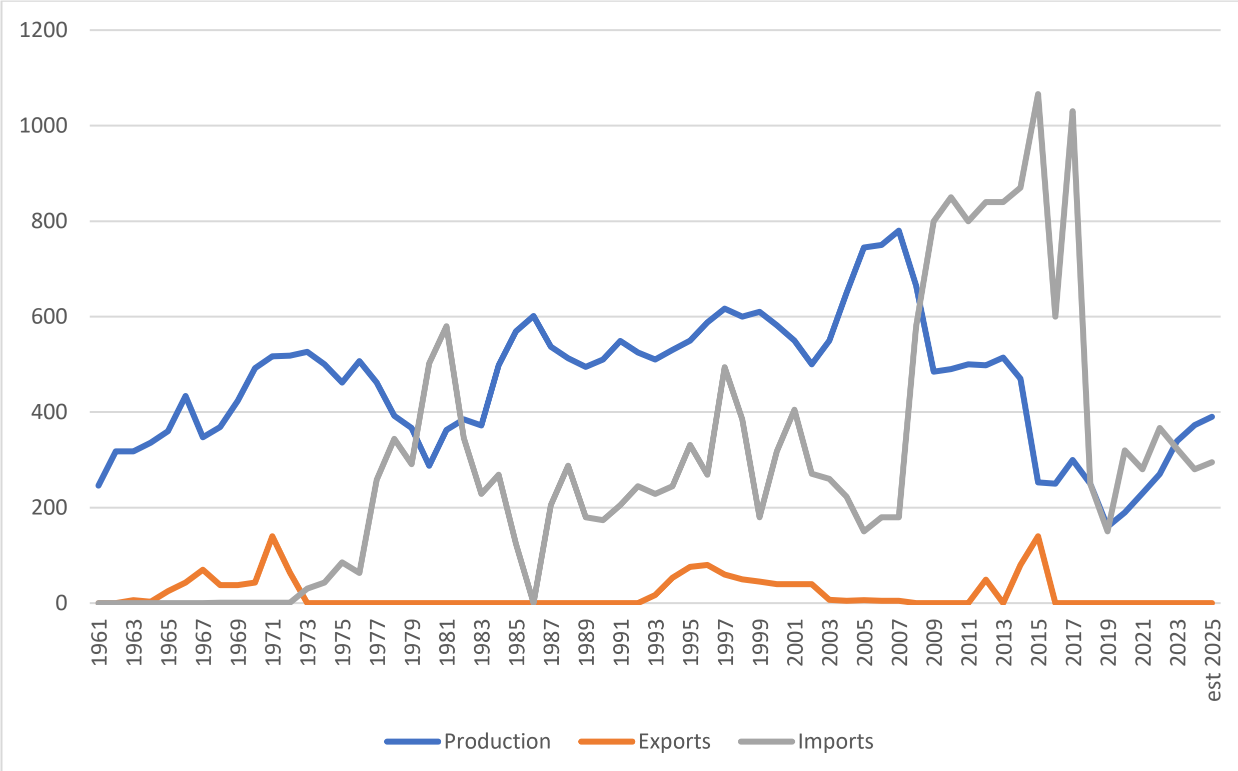

Figure 31. Venezuela Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[44]

- Venezuela has an average applied tariff for the HS17 category of 23.6% according to the WTO.
- There are presently 10 state-owned sugar mills.
- The government estimates MY2025/26 sugar inventories will be 70 percent higher due to mandates for sugar inventories to supply the CLAP program.
- State issued import licenses.
- Since December 2020, refined sugar has maintained an 8% basic customs duty with a VAAT of 16%. The government sporadically grants import licenses and exempts VAT and import duties depending on economic conditions.

[44] See USDA. 2022. "Sugar Annual – Venezuela," Report No. VE2022-0011, Caracas, Venezuela (April; available at: https://www.fas.usda.gov/data/gain-report/2022/04/Sugar%20Annual_Caracas_Venezuela_VE2022-0011.pdf).

Zimbabwe

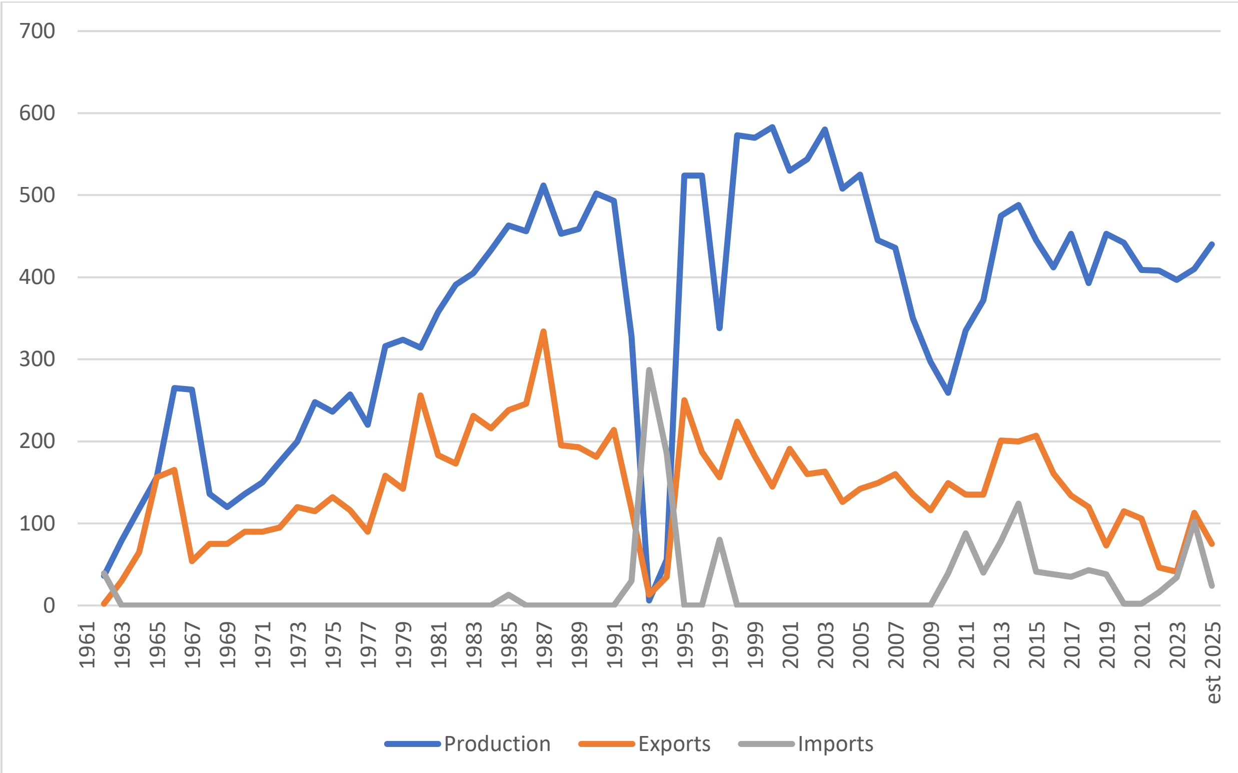

Figure 32. Zimbabwe Production (Raw Sugar in '000 MT), Exports, and Imports (Raw and Refined), 1961-2025. Source: USDA-FAS. 2026. Production, Supply, and Distribution database, available online at: https://apps.fas.usda.gov/PSDOnline/app/index.html#/app/home.

Key Policies:[45]

- Zimbabwe has a zero percent average applied tariff for the HS17 category.
- All sugar produced in Zimbabwe must comply with labelling and Vitamin A fortification regulations.
- The government of Zimbabwe requires exporters to convert 25 percent of export receipts into the local currency, which disadvantages export sales.
- Zimbabwe reinstated a 30 percent surtax on imported sugar in MY 2024/25, leading to more sales on the local market, following a spike in imports in MY2023/24.
- To maintain low retail prices for sugar in Zimbabwe, the government negotiates the price at which Star Africa buys raw sugar from the sugar mills. Star Africa is also required to obtain permission from the government to increase the wholesale and retail prices of refined sugar sold in Zimbabwe.
- The government introduced mandatory ethanol blending requirements in 2011. The current minimum mandatory blend percentage for vehicle fuels is 20 percent, but the level varies depending on the domestic supply and availability of ethanol.
- Sugar industry benefits from direct government funding, investment, and support.

[45] See USDA. 2026. "Sugar Annual – Zimbabwe," Report No. RH2026-0001, Pretoria, South Africa (April; available at: https://www.fas.usda.gov/data/gain-report/2026/04/Sugar%20Annual_Pretoria_Zimbabwe_RH2026-0001.pdf).

- Project Kilimanjaro is an initiative by the Zimbabwean government, Tongaat Hulett, and private banks to assist up to 1,070 private farmers supplying cane to mills to increase productivity on their 22,822 ha by increasing yields to at least 100 MT/ha by MY 2023/24.
- About $17.1 million has been spent to date with 2,700 ha of virgin land cleared, storage dams and water canals built, water pumps installed, and 455 ha planted to cane.