

Brazil Cane Sugar Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The Brazil cane sugar market is projected to register a CAGR of 5.1% over the next five years.

Key Highlights

The sugarcane industry in Brazil is playing a leading role in the global market. Approximately 70% of Brazil's sugar production is exported, which accounts for 49% of global exports. More than 100 countries worldwide import Brazilian sweetener, which aids in the fight against malnutrition and provides a significant natural and easily available source of energy for consumers. According to UNICA (Portuguese: Uniao da Industria de Cana-de-Acucar), in 2022, the Brazilian Sugarcane Industry Association, the country's social, political, and economic history is all deeply rooted in the heritage of sugar.

Brazil is one of the world's most popular sugarcane producers and exports and imports sugar. Brazil contributes to about 23% of the world's production. The country has flexible production mills which can change their production level while processing.

Attributed to the abundance of sugarcane and the properties of sugarcane being superior to beet sugar and offering better flavor and caramelization is supporting market demand. Further, Brazil is a part of the Global Alliance for Sugar Trade Reform and Liberalization, an organization that works to facilitate the ability of individuals to trade sugar internationally.

Manufacturers focus on new investments leading to technological innovations, thus supporting ethanol production as a clean alternative to 'fossil fuels.' Furthermore, the opportunities for organic and fair-trade cane sugar are also rising in the country. Consumers are increasingly interested in consuming healthy and natural products, paving the way for interesting opportunities for organic and ethically sourced products and their production by manufacturers.

Brazil Cane Sugar Market Trends

Large Production Base in the Country Supporting Demand Growth

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As per the Organisation for Economic Cooperation and Development (OECD), Brazil is the world's largest sugar producer and is the main sugar exporter. The weak currency of Brazil favors a good level of sugar exports in Brazil. Also, sugarcane-based ethanol production is highly profitable in Brazil owing to low crude oil prices. Furthermore, the production of molasses, thick juice, or residue from milling cane is used for energy supply in the country.

According to UNICA (Portuguese: Uniao da Industria de Cana-de-Acucar), the Brazilian Sugarcane Industry Association, Brazil produces six types of cane sugar products which include varieties such as raw sugar, refined icumsa 45, white crystal, organic sugar, VHP very high polarization (VHP) sugar and VVHP sugar (Very Very High Polarization). Further, In response to the technological revolution in sugarcane production, the RenovAco Project encouraged professional training for workers in six of the State of So Paulo's main sugarcane-producing regions.

The project was a collaboration between UNICA, the Federation of Salaried Rural Employees of the State of So Paulo (FERASEP), Solidaridad Foundation, and businesses involved in the production chain Syngenta, Case IH, Iveco, and FMC. The IDB (Inter-American Development Bank) provided financial support for the project.

According to Sugarcane.org, Brazil produces and exports the most sugar (41.5 million tonnes), with 32,13 million tonnes going overseas in the 2020-2021 period. This represents 49% of global exports and 23% of global production. Over the past few years, sugarcane cultivation has been key to improving the country's local economy.

As per the Organisation for Economic Cooperation and Development (OECD), Brazil is likely to remain the prime producer of sugarcane and produce 36% of the world's sugarcane by 2030. Over the last 35 years, the sugarcane sector of the country has grown tremendously, owing to outstanding technological progress enabled by new varieties, fertilizers, chemicals, mechanization, and different cropping practices. The growing demand from various application areas worldwide is anticipated to support the country's sugar production and consumption.

Food and Beverage Industry is the Major Application Area in the Country

Cane sugar has multiple applications across different industries of food and beverage, pharmaceuticals, industrial, and other potential applications. Brazil's food and beverage industry is the country's primary application of cane sugar. The beverage industry of Brazil shows signs of recovery from the pandemic and offers a greater level of optimism, thus leading to increased use of cane sugar.

Cane sugar is used at home, at bakeries, as syrups in bread making, as liquid sugar in confectionery items, etc. It is also used in baked custards and other desserts to produce desirable flavor-characterizing cooked foods such as cookies, bread, dumplings, etc. Therefore, the augmented consumption of beverages supports the market demand in Brazil and paves the way for opportunities for cane sugar manufacturers operating in the country.

Cane sugar, available in various forms, has wide applications in food industries, including baking and confectionery. Icing sugar is made from powdered sugar. Sugar syrups are added to drinks or serve as the foundation for fruit toppings, sauces, and flavored syrups. Additionally, sugars mask acidic and bitter flavors, such as tomato sauces, mayonnaise, and pharmaceutical syrups.

Sugars greatly influence foods' bulk (volume) and texture (mouthfeel). For instance, sugars contribute to the cakes and cookies volume. The jelly texture of jams results from the mixture of sugar and a gelling ingredient (like pectin).

Sugar traps air bubbles and raises the temperature at which starch gelatinizes in baked products, giving cakes a light texture. Sugars are also the foundation for yeast fermentation (e.g., in rising bread). Sugar has humectant properties (it binds water), which are crucial for food preservation and have an impact on texture. Additionally, sugars lower the freezing point, essential for making softer ice cream, and raise the boiling issue, which is necessary for making sweets. Brazil has significant demand for bakery and confectionery products, driving the market further.

Brazil Cane Sugar Market Competitor Analysis

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The Brazil cane sugar market is a fragmented market, with the presence of various players. With a large production base in the country, the market also has the presence of different local players. Due to the strong presence of players and the lucrative market behavior, various global players are entering the market and building partnerships with the local players. The different players in the market are trying to improve their presence among consumers. The market is dominated by some of the key players like Tate & Lyle, Tereos SA, Louis Dreyfus Company, Agro Betel, and Cosan Limited, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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