

Brazil Sugar Market Size, Share and Growth Analysis Report - Forecast Trends and Outlook (2025-2034)

Market Report | 2025-06-28 | 127 pages | EMR Inc.

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Report description:

The Brazil sugar market size reached around 9.55 MMT in 2024. The market is projected to grow at a CAGR of 1.60% between 2025 and 2034 to reach nearly 11.19 MMT by 2034. The market growth can be attributed to the rising popularity of flex-fuel vehicles and the rapid growth of the domestic food and beverage industry. Moreover, the adoption of sustainable farming practices is shaping the market dynamics favourably.

Brazil Sugar Market Report Summary

Description

Value

Base Year

MMT

2024

Historical Period

MMT

2018-2024

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Forecast Period

MMT

2025-2034

Market Size 2024

MMT

9.55

Market Size 2034

MMT

11.19

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

1.60%

CAGR 2025-2034 - Market by Type

Liquid

2.0%

CAGR 2025-2034 - Market by Form

Syrup

1.9%

CAGR 2025-2034 - Market by End User

Residential

1.9%

Brazil Sugar Market Growth

Brazil is the world's largest sugar producing country and accounts for nearly 21% of the global market share. Besides, it is also the world's second-largest ethanol producer with a 26% market share. It is expected to maintain its status quo by accounting for nearly 37% of the world's total sugar production by 2031. The increasing prices of sugar internationally are bolstering national exports, thereby contributing to Brazil sugar market expansion. In 2022, Brazil exported 28 MMT of sugar internationally, about 17MMT higher than the world's second-largest sugar exporter, Thailand. Bioenergy, sugar, and ethanol employ nearly 8% of Brazil's agribusiness workforce and are a major source of its export earnings (USD 11 billion in 2022).

Brazilian sugar mills entirely rely on sugarcane bagasse for energy production and sell their any excessive amount back to the grid. The global shift towards renewable energy resources has prompted the Brazilian government to introduce new capacity auctions to drive the transition towards clean energy. As per the Brazil sugar market analysis, bioelectricity can potentially fulfill nearly 30% of all power requirements, which is favourably influencing the market growth.

Key Trends and Developments

Rising demand for ethanol; technological advancements in the agriculture sector; increasing investments in sugarcane cultivation; and diversification of by-products are key factors driving the Brazil sugar market expansion.

October 2024

Raizen, leading Brazilian producer of ethanol and sugar, announced crushing 32.9 million tonnes of sugarcane in Q2 of FY 2024-25. Driven by rising sugar sales, the total production is expected to increase to 4.6-4.8 million tonnes in the quarter.

October 2023

COAGRO, ZEG Biogas, and Porto do Acu signed a contract to build a biomethane plant in Rio de Janeiro using sugarcane by-products like vinasse. Producing 3.7 million cubic metres annually by 2026, this project supports renewable energy, waste reduction, and sustainability, aligning with Brazil's biofuel goals and transitioning towards a low-carbon economy.

August 2023

Raizen became the world's first ethanol producer to receive an ISCC CORSIA certification from the International Civil Aviation Organisation for the production of sustainable aviation fuel (SAF) at its Piracicaba facility. SAF is critical for the global airline industry to achieve its net zero targets by 2050, and is expected to favourably impact the Brazil sugar market dynamics in the coming years.

July 2023

Braskem, a leading petrochemical manufacturer of Latin America, completed the expansion of its existing bioplastic production facility in Rio Grande do Sul with an investment of nearly USD 87 million. This is expected to facilitate the Brazil sugar market growth since sugar is a critical raw material for bioplastic production.

Rising demand for ethanol

As per the Brazilian Ministry of Mines and Energy, ethanol is an important part of the national energy security strategy. Many local

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consumers prefer flex-fuel vehicles since they lower GHG emissions and are suitable for usage in rural areas. Ethanol-powered vehicles constitute a major portion of the automotive industry share, which is contributing to Brazil sugar market growth.

Adoption of advanced technologies

Brazil is focusing on adopting advanced technologies for sugar cane cultivation, such as genetic engineering, precision farming, and mechanisation. Precision farming techniques, including remote sensing technologies and GPS-guided machinery, enable farmers to properly optimise inputs like fertilisers and pesticides, thereby increasing yield per hectare and reducing the environmental impact of farming practices.

Increasing investment in sugarcane industry

The Brazil sugarcane industry is receiving increasing attention from foreign investors due to shifting climate change patterns and emerging opportunities in clean energy industry. The increasing consumer demand for ethically sourced food products is also driving investments in organic sugarcane production, thereby influencing the Brazil sugar market dynamics favourably.

Diversification of by-products

The market is capitalising on by-products like bagasse (used for energy generation) and molasses (used in animal feed and fermentation), enhancing profitability and reducing waste. This is increasing sustainability, hence contributing to the market expansion.

Brazil Sugar Market Trends

Rising biofuel production

In 2023, ethanol production in Brazil surged year-on-year by 15.5%, reaching 35.4 billion litres. According to the Brazil sugar market analysis, the southern region accounted for nearly 48.5% of national ethanol production and dominated the total production share. Meanwhile, the production of anhydrous ethanol and hydrated ethanol also increased by 13.5% and 16.8%, respectively. This is in line with the growing popularity of flex-fuel vehicles in the country that offer consumers the option to choose from either gasoline or ethanol for powering their vehicles.

Diversification of by-products

Brazil's sugar industry is maximising efficiency by diversifying sugarcane by-products. Bagasse, the fibrous residue from sugarcane processing, is used for generating bioelectricity, powering mills, and contributing surplus energy to national grids. Molasses, another key by-product, is widely utilised in ethanol production, animal feed, and fermentation industries. This is creating a favourable Brazil sugar market outlook. Additionally, vinasse, a by-product of ethanol production, is being repurposed as a biofertiliser. These practices not only enhance profitability but also promote sustainability by reducing waste and optimising resource utilisation within the industry.

Brazil Sugar Industry Segmentation

The EMR's report titled "Brazil Sugar Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Breakup by Type

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- White
- Brown
- Liquid

Breakup by Form

- Granulated
- Powdered
- Syrup

Breakup by End User

- Industrial
- Residential

Brazil Sugar Market Share

Based on type, the market is segmented into liquid, brown, and white. Over the forecast period of 2025-2034, the market for liquid sugar is expected to grow at a CAGR of 2.0% due to its increasing applications in the food and beverage industry.

Based on end user, the market is categorised into residential and industrial. Over the forecast period of 2025-2034, the demand for sugar in Brazil's residential sector is expected to grow at a CAGR of 1.9% due to the rising popularity of sweet confectionery items and desserts. The industrial segment is also expected to drive market growth, driven by the rising appeal for ethanol as an automotive fuel among consumers.

CAGR 2025-2034 - Market by

End User

Residential

1.9%

Industrial

XX%

Leading Companies in the Brazil Sugar Market

Major market players are focusing on ethanol production, leveraging sugarcane by-products for bioenergy, and adopting sustainable practices. Investments in advanced technologies for efficient harvesting and processing are also rising. Companies are further expanding export capacities, targeting high-demand regions, while diversifying into renewable energy solutions like biomethane production, which is contributing to Brazil sugar market development.

Cosan SA

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Cosan SA was founded in 1936 and is headquartered in Sao Paulo. It is an investment management company that operates in industries like renewable energy, oil and gas, and agribusiness.

Tereos Group

Tereos Group was founded in 1932 and is headquartered in France. It is a food and beverage company that specialises in processing cereals, sugarcane, alfalfa, and beetroot. It is present in 15 countries worldwide and posted revenues worth EUR 7.1 billion in 2023.

COFCO International

COFCO International is a food and beverage company that was founded in 1949 and is headquartered in Geneva, Switzerland. It is engaged in buying, selling, and distributing agricultural commodities worldwide.

COPERSUCAR S.A

COPERSUCAR S.A was founded in 1959 and is headquartered in Sao Paulo, Brazil. It is Brazil's largest commercial producer of ethanol and sugar.

Other players included in the Brazil sugar market report are BIOSEV S.A, among others.

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