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Report Highlights:

FAS Pretoria forecasts that sugar cane production in MY 2026/27 will increase by four percent from MY 2025/26 based on expanded planted area and available water for irrigation. Additionally, sugar mills conducted off crop mill maintenance to enhance milling performance. MY 2026/27 imports are forecast to drop year-on-year based on imposed import surcharges; this is expected to lead to a decline in exports as the industry prioritizes supplying the domestic market. On August 15, 2025, Zimbabwe received a U.S. tariff rate quota (TRQ) allocation of 12,910 MT for FY 2026. By November 2025, Zimbabwe had already utilized its FY 2026 TRQ.

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Report Highlights

- Sugar cane and sugar production: FAS Pretoria forecasts that sugar cane production will increase four percent year-on-year in MY 2026/27 due to improved water availability for irrigation. Millers also had sufficient period to conduct off-crop maintenance to enhance milling performance.
- Domestic consumption: FAS Pretoria forecasts that MY 2026/27 domestic consumption of sugar will increase by six percent based on a reported decline in the annual inflation rate and availability of locally produced sugar.
- Exports: The domestic market typically offers higher prices than the export market. FAS Pretoria forecasts that sugar exports will decline 39 percent in MY 2026/27 as producers supply more sugar to the local market amid reduced imports.
- Imports: FAS Pretoria forecasts that imports will decline 14 percent in MY 2026/27 compared to MY 2025/26 due to higher import duties.

Report Notes

The marketing year (MY) for sugar cane is April-March, while the sugar marketing year is considered May-April. For the purposes of this report, refined cane sugar has been converted to raw value basis using a factor of 1.07.

Sugar Cane

Table 1: Production, Supply, and Distribution (PSD) Table for Sugar Cane

Sugar Cane for Centrifugal Market Year Begins	2024/2025		2025/2026		2026/2027	
	Apr 2024		Apr 2025		Apr 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Zimbabwe						
Area Planted (1000 HA)	54	47	0	47	0	52
Area Harvested (1000 HA)	45	45	0	44	0	49
Production (1000 MT)	3358	3635	0	3650	0	3780
Total Supply (1000 MT)	3358	3635	0	3650	0	3780
Utilization for Sugar (1000 MT)	3289	3566	0	3581	0	3711
Utilizatn for Alcohol (1000 MT)	69	69	0	69	0	69
Total Utilization (1000 MT)	3358	3635	0	3650	0	3780
(1000 HA) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Area

FAS Pretoria forecasts that area planted in MY 2026/27 will increase by 10 percent compared to MY 2025/26, as FAS contacts report that there are newly planted fields which will be harvested in MY 2026/27. In November 2025, the government of Zimbabwe published a [strategic plan](#) expected to support further expansion in sugar cane area. However, despite some optimism about sugar cane growth, the domestic sugar market remains saturated. As a result, any additional expansion over the longer term is expected to be directed primarily toward ethanol production and other value-added products rather than the local sugar market.

FAS Pretoria maintains steady area planted in MY 2025/26 as growth is estimated to have remained virtually unchanged from MY 2024/25 due to several limiting factors. Water conveyance systems for irrigation are constrained in some existing sugar cane-growing regions, as well as in areas earmarked for expansion. In addition, growers are faced with rising production costs for key inputs, including agrochemicals, seedcane, and electricity. Although some growers report that electricity supply has been more consistent compared to the preceding marketing year, power availability remains a concern. As a result, many growers are investing in alternative power sources to pump water for irrigation.

Some growers are located nearly 70 kilometers from processing facilities and previously relied on rail transport to move their cane to the mills, but rail service has reportedly underperformed. Growers now move more of their cane by truck, which increases overall transport costs and erodes profits, threatening the long-term sustainability of their operations.

Production

FAS Pretoria forecasts that MY 2026/27 production will increase by four percent from MY 2025/26 based on improved availability of water for irrigation (see Table 2) and expanded area under sugar cane production. Furthermore, electricity supply is reported to be more consistent compared to the previous season due to some large-scale growers paying a premium for electricity. FAS Pretoria contacts report minimal carryover cane to be harvested in MY 2026/27. Approximately 500 ha remained unharvested in MY 2025/26 due to transportation challenges and an early rainy season starting in mid-November.

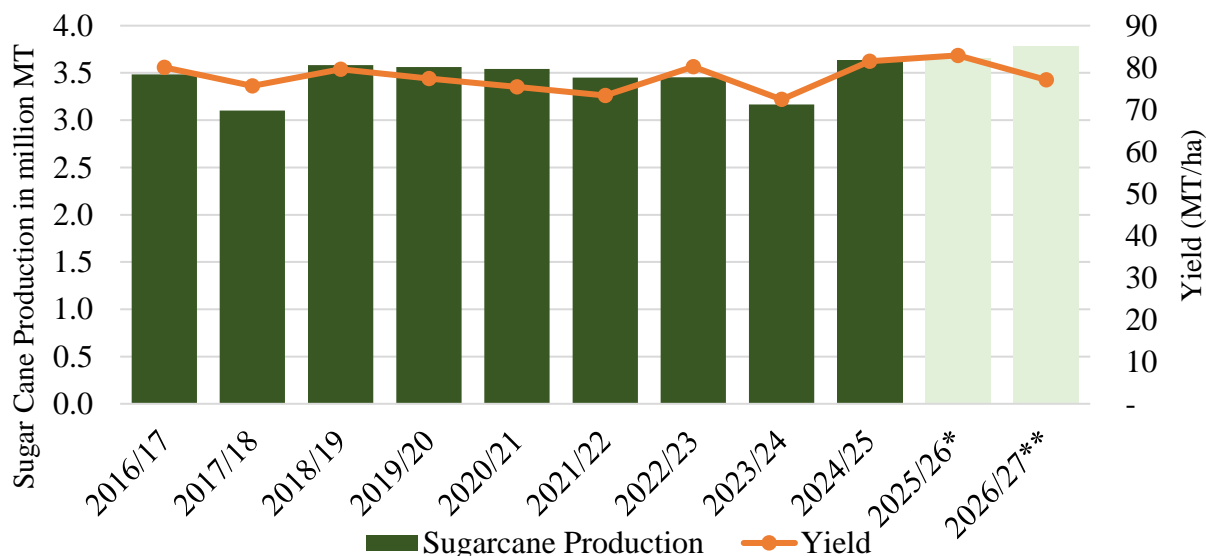
FAS Pretoria revises MY 2025/26 sugar cane production estimate upward to 3.65 MMT from the previous estimate due to more available water for irrigation. However, production will not much exceed MY2024/25 levels because of electricity outages in some production regions during hot and dry periods, which limited irrigation effectiveness locally. FAS Pretoria maintains MY 2024/25 production at 3.64 MMT (see Figure 1).

Table 2: Levels of Dams Supplying Irrigation Water to the Sugar Industry

Dam Name	Full Volume (Cubic Meters)	% Full on				
		22-Apr-22	13-Feb-23	6-Mar-24	4-Apr-25	16-Mar-26
Tugwi Mukosi	1,802,600	100	91	85	100	100
Mutirikwi	1,378,080	100	97	97	99.9	100
Manjirenji	274,170	80	53	48	90.9	93.3
Manyuchi	30,600	100	84	84	100	99.5

Source: [Zimbabwe National Water Authority](#)

Figure 1: Zimbabwe Sugar Cane Production and Yields



Sources: Zimbabwe Sugar Association Experiment Station (ZSAES) and FAS/Pretoria Forecasts

*FAS/Pretoria MY 2025/26 Production Estimate.

** FAS/Pretoria MY 2026/27 Production Forecast.

Figure 2: A Sugar cane Field in the Lowveld Region

The sugar cane in figure 2, and for most of the cane in Zimbabwe, is expected to be harvested late April for MY 2026/27. Growing conditions are reported to have improved compared to MY 2025/26. This field is irrigated by furrow irrigation.



Source: FAS Pretoria while on crop tour

Figure 3: Cane Leaves with Yellow Aphids

Yellow Sugar cane Aphid is one of the major pests affecting cane production in Zimbabwe. It leads to cane stunting and yield loss.



Source: FAS Pretoria while on crop tour

Source: ZSAES Facebook page

Post contacts shared that the sugar industry has 22 cane varieties available to growers for planting, namely the N14, Mo376, CP72-2086, CP 72-1312, and ZN1 through ZN18. Cane varieties ZN11 to ZN18 were released in October 2023 and are available to growers. N14 remains the most widely planted variety, while others, such as ZN10, have declined in area due to high susceptibility to yellow sugarcane aphid.

Yellow sugarcane aphid is a major pest, and FAS Pretoria contacts note a resurgence of African sugarcane stalkborer (*Eldana saccharina*), particularly in newer, increasingly popular varieties such as ZN9 and ZN10. Contacts also report that ratoon stunting disease is a major disease driven largely by the lack of certified seedcane, as growers typically use commercial fields to establish new plantings.

Sugar

Table 3: Production, Supply, and Distribution (PSD) Table for Sugar

Sugar, Centrifugal Market Year Begins	2024/2025		2025/2026		2026/2027	
	May 2024		May 2025		May 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Zimbabwe						
Beginning Stocks (1000 MT)	139	139	300	178	0	180
Beet Sugar Production (1000 MT)	0	0	0	0	0	0
Cane Sugar Production (1000 MT)	440	440	425	445	0	457
Total Sugar Production (1000 MT)	440	440	425	445	0	457
Raw Imports (1000 MT)	7	7	10	5	0	4
Refined Imp.(Raw Val) (1000 MT)	17	17	45	17	0	15
Total Imports (1000 MT)	24	24	55	22	0	19
Total Supply (1000 MT)	603	603	780	645	0	656
Raw Exports (1000 MT)	110	69	49	100	0	60
Refined Exp.(Raw Val) (1000 MT)	2	6	2	15	0	10
Total Exports (1000 MT)	112	75	51	115	0	70
Human Dom. Consumption (1000 MT)	191	350	355	350	0	370
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	191	350	355	350	0	370
Ending Stocks (1000 MT)	300	178	374	180	0	216
Total Distribution (1000 MT)	603	603	780	645	0	656
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

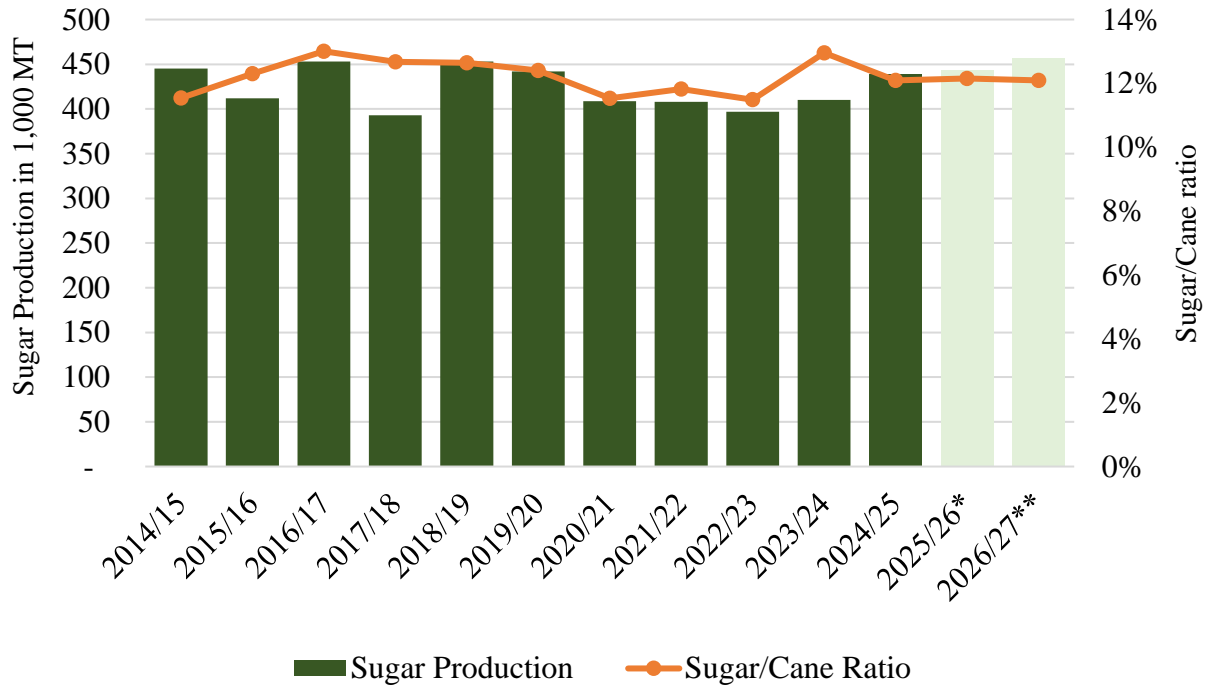
Production

FAS Pretoria forecasts that sugar production in MY 2026/27 will increase by three percent from MY 2025/26 driven by increased sugar cane production and sufficient off crop mill maintenance. Between January and March, the industry typically carries out maintenance of sugar mills to enhance milling performance during the milling season. During a March 2026 visit to a sugar mill in Zimbabwe, FAS Pretoria observed active off-crop maintenance. The 2026/27 milling season is expected to start mid-April and run through November.

In MY 2025/26, sugar production is revised upwards by 20,000 MT driven by higher crushing rates. This reflects a one percent improvement from MY 2024/25 supported by a consistent, efficient cane delivery system. FAS Pretoria reports that cane quality improved in MY 2025/26. Furthermore, benefiting from higher yields and sucrose content, the season was shortened to 26

weeks from 33 weeks in the prior year, which saved processors some operational costs. FAS Pretoria maintains MY 2024/25 sugar production at 439,581 MT based on finalized industry data.

Figure 4: Zimbabwe Sugar Production



Sources: ZSAES, Zim Sugar Sales and FAS/Pretoria Forecasts

*FAS/Pretoria MY 2025/26 Production Estimate.

** FAS/Pretoria MY 2026/27 Production Forecast.

Consumption

FAS Pretoria forecasts that MY 2026/27 domestic sugar consumption in Zimbabwe will increase by six percent from MY 2025/26. This anticipated growth is based on stable domestic retail prices, a slight downward revision of the sugar tax for cordials, adequate sugar supply, and a decline in the annual inflation rate. Domestic consumption of sugar in Zimbabwe is constrained by high unemployment and elevated rural poverty rates. However, Zimbabwe’s annual inflation rate reportedly fell from double digits – 15 percent in December 2025 – to 3.5 percent year-on-year in February 2026, its lowest level since 1997. FAS Pretoria contacts report that table sugar prices have remained steady at approximately \$1.35 per kilogram, which is expected to support increased domestic consumption.

The main consumers of sugar in Zimbabwe are manufacturers (including beverage, confectionery, and bakery sectors) and private households. Household sugar consumption is primarily less-refined brown sugar, with white sugar accounting for a smaller share. The domestic sugar industry prioritizes the local market, where prices are higher than in export markets. Transactions remain predominantly in U.S. dollars rather than the local currency, Zimbabwe Gold (ZiG).

Effective January 1, 2025, the Zimbabwean government reduced the sugar tax from \$0.02 per gram to US\$0.001 per gram for general beverages and US\$0.0005 per gram for cordials. While this reduction has provided some relief, sugar processors continue to face subdued demand, particularly from beverage sector customers affected by the sugar tax. Some producers have lowered prices to stimulate demand. The use of alternative sweeteners by beverage producers remains limited and has had minimal impact on the industry thus far.

FAS Pretoria revises MY 2024/25 and MY 2025/26 consumption estimates downward, reflecting a lingering reduction in demand due to high inflation and the sugar tax, as processors have reformulated products.

Exports

FAS Pretoria forecasts MY 2026/27 total sugar exports (raw and refined) will decline by 39 percent, as the industry prioritizes supplying the domestic market amid a continued downward trend in imports. Domestic sugar prices typically exceed export prices, and Zimbabwe only exports surplus sugar once domestic demand is met. Additionally, the global sugar market price is reported to be receding, further reducing the value of exports.

FAS Pretoria revises MY 2025/26 raw sugar exports upwards to 100,000 MT, reflecting increased sugar production and higher year-to-date exports to Mozambique—approximately 57,000 MT compared to 15,338 MT in MY 2024/25. Zimbabwe also filled its U.S. Tariff-Rate Quota (TRQ) by November 2025 and plans to continue supplying key markets such as Botswana.

FAS Pretoria revises MY 2024/25 raw sugar exports upward to 69,307 MT based on finalized data. This represents a 55 percent decrease from MY 2023/24, as more local production was sold domestically compared to the previous year, when cheaper imports displaced local supply and resulted in increased exportable surplus. In MY 2024/25, exports were primarily destined for Botswana (29 percent), the United States (27 percent), Mozambique (22 percent), and Kenya (16 percent).

On August 15, 2025, the Office of the United States Trade Representative (USTR) announced a sugar TRQ allocation of 12,910 MT for FY 2026 (October 1, 2025, through September 30, 2026). The United States remains a premium market for Zimbabwean sugar, and Zimbabwe consistently utilizes its full TRQ allocation each year. Historically, Zimbabwe exported in-quota sugar to the United States duty-free; however, as of April 2025, Zimbabwean sugar is subject to both an in-quota duty and an over-quota duty based on weight.

Table 4: U.S. Tariff-Rate Quota Allocations for Zimbabwean Raw Cane Sugar, Refined and Specialty Sugar, and Sugar-Containing Products. (Values in Raw Value Metric Tons)

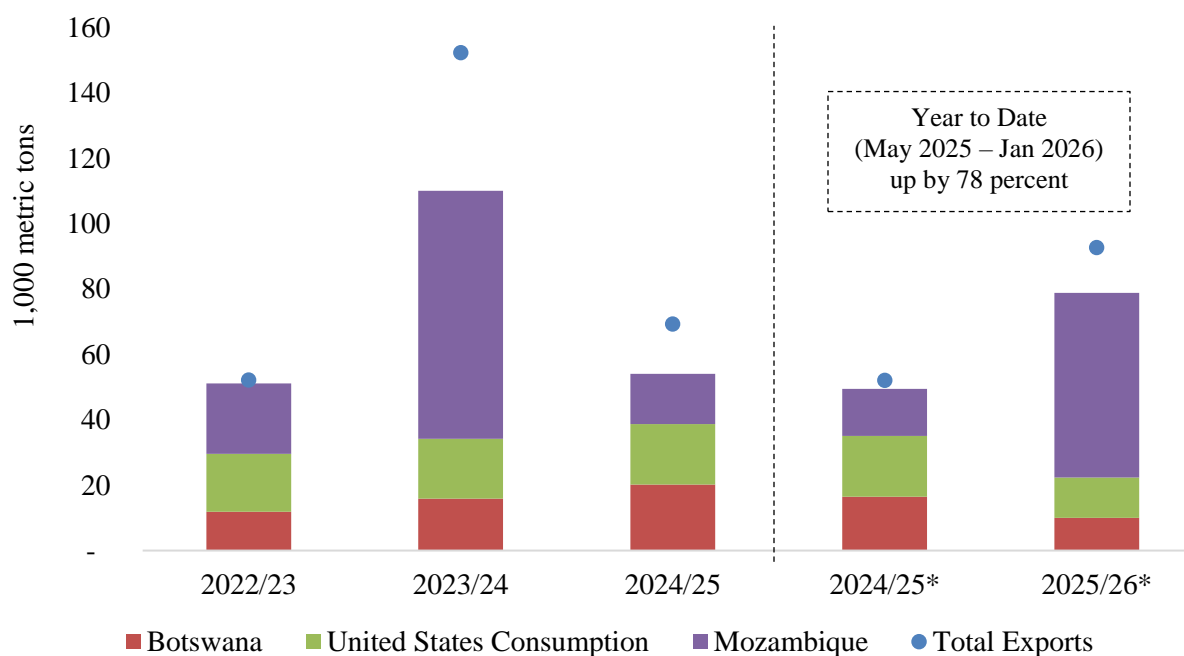
	Volumes in Metric Tons Raw Value		
	FY 2024 Oct 1, 2023- Sept 30, 2024	FY 2025 Oct 1, 2024- Sept 30, 2025	FY 2026 Oct 1, 2025- Sept 30, 2026
Initial Allocation	<u>12,910</u>	<u>12,910</u>	<u>12,910</u>
Unused Reallocation	<u>4,352</u>	0	
Increase Allocation	<u>2,249</u>	0	
Total	19,511	12,910	12,910

Source: FAS Pretoria using USTR information

The sugar industry’s marketing year (MY) runs from April to March, while the TRQ year runs from October to September. This overlap can result in TRQs for two different fiscal years being recorded within a single marketing year.

Kenya has remained a key market for Zimbabwe’s refined sugar exports. In MY 2025/26, Zimbabwe increased exports to Kenya to 14,944 MT, up from 1,269 MT in MY 2024/25. According to FAS Pretoria contacts, Zimbabwe plans to resume refined sugar exports to Botswana in MY 2026/27.

Figure 5: Zimbabwe’s Raw Sugar Exports (HS Code:170111/170112/170113/170114)**

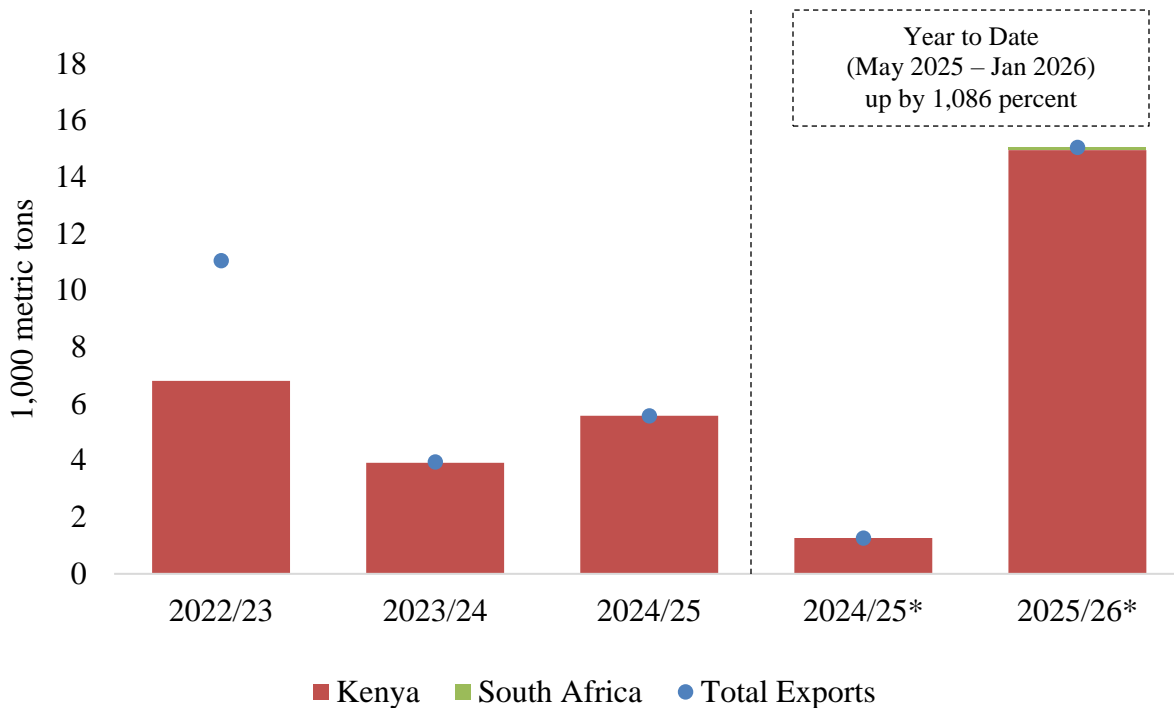


Source: FAS/Pretoria using Trade Data Monitor, LLC.

**Data for periods between May – Jan*

***FAS Pretoria used Mirror data to fill in missing data*

Figure 6: Zimbabwe’s Refined Sugar Exports (HS Code Codes: 170191, 170199)**



Source: FAS/Pretoria using Trade Data Monitor, LLC.

*Data for periods between May – Jan

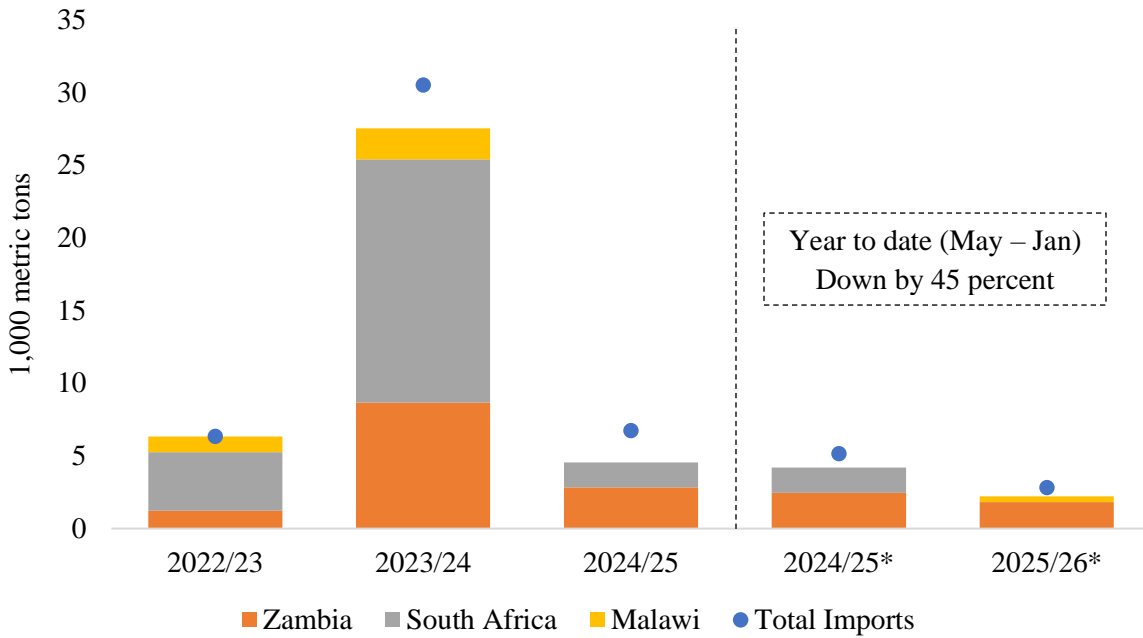
Refined sugar volumes in figure 6 have been converted to raw value using a factor of 1.07.

Imports

FAS/Pretoria forecasts that Zimbabwe’s MY 2026/27 sugar imports will drop by 14 percent on available domestic supply and higher import duties. Imported sugar is usually traded below the cost of Zimbabwean production, making it cheaper than locally produced sugar. Additionally, sugar produced in Zimbabwe must comply with labelling and Vitamin A fortification regulations, while some imported sugar does not comply with those requirements, further undermining price levels of domestic production. After a significant spike in imports in MY 2023/24, the government imposed a 30 percent surtax on imported sugar in 2024, a move designed to protect the local industry from cheap imports.

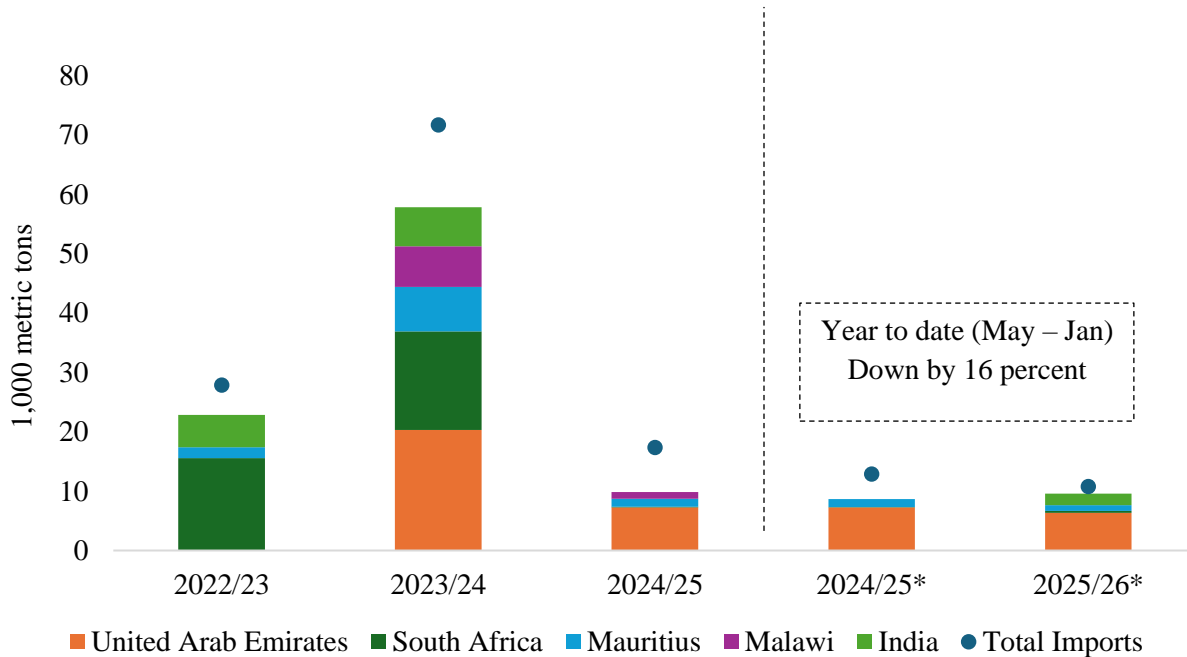
In MY 2025/26, sugar imports are revised downwards to 22,000 MT based on the pace of year-to-date imports. Further, import duties have discouraged an influx of imported sugar recorded in MY 2023/24. FAS Pretoria revises MY 2024/25 imports downwards to 24,071 MT on finalized data. This reflects a 76 percent drop from MY 2023/24 when sugar imports increased when the government suspended the import duty on essential household commodities, including sugar, to control food inflation.

Figure 7: Zimbabwe's Raw Sugar Imports
 HS Codes: 170111/170112/170113/170114



Source: FAS/Pretoria using Trade Data Monitor, LLC.
 *Data for periods between May – Jan

Figure 8: Zimbabwe's Refined Sugar Imports
 HS Codes: 170191, 170199



Source: FAS/Pretoria using Trade Data Monitor, LLC.
 *Data for periods between May – Jan

Refined sugar volumes in figure 8 have been converted to raw value using a factor of 1.07

Ending Stocks

FAS/Pretoria forecasts that ending stocks will increase to 216,000 MT in MY 2026/27, based on the expected decrease in exports and a slight increase in the domestic market. All the sugar produced in each marketing year is considered sold at the end of the season, as the industry must share revenue between growers and millers per the agreed “division of proceeds” formulas used by the milling companies and industry. Ownership of closing stocks is usually held by wholesalers, retailers, refineries, and to a limited extent, the Zimbabwe Sugar Sales Company. Larger ending stocks, especially those held by the Zimbabwe Sugar Sales Company, pose a cost challenge to the industry as growers and millers must pay for storage.

Trade Policy and Regulations

National Development Strategy 2 and the Zimbabwe Sugarcane Industry Development Strategy

The Government of Zimbabwe has published National Development Strategy 2 (NDS2) for implementation over the period 2026–2030. This second five-year plan includes targeted interventions for the sugar sector, notably the implementation of a Sugar Value Chain Strategy (2026–2035) to attract investor interest and mobilize capital into the industry.

The Zimbabwe Sugarcane Industry Development Strategy (2026–2035), which aligns with NDS2, aims to reposition the sugar industry as a central pillar of rural industrialization, energy generation, and export growth. The core objective of the strategy is to double cane production to 800,000 metric tons over the implementation period.

Customs Duties

In 2014, the Zimbabwean government instituted a 10 percent customs duty plus \$100/MT surtax on all sugar imports from countries outside of Southern African Development Community (SADC) and the Common Market for Eastern and Southern Africa (COMESA) in a bid to protect the local industry from an influx of sugar imports from countries such as Brazil and India. In May 2022, the Zimbabwean government suspended custom duties on basic commodities, including sugar, for a period of six months (until November 2022) to combat serious supply shortages in the market. The tariff was then reinstated on November 16, 2022, at a 10 percent customs duty plus \$100/MT surtax on all sugar imports from countries outside of SADC and COMESA.

To control for food price inflation, the Zimbabwean government again [suspended import duties](#) on essential goods (sugar, cooking oil, corn meal, milk, rice, flour, salt) effective from May 12, 2023, and repealed the Statutory Instrument effective January 1, 2024. The Government reinstated a 30 percent surtax on sugar, therefore, the Zimbabwean sugar sector expects to see a rebound in domestic sales, complimented by a decrease in exports.

Levy on Sugar Content of Beverages

The Zimbabwean Minister of Finance in a national budget speech on November 30, 2023, announced the introduction of a tax on beverages containing added sugar. The Zimbabwean government cited health concerns linked to high sugar consumption as the main reason for

imposing the tax. A levy of \$0.02 per gram of added sugar in beverages went into effect on January 1, 2024. Contacts shared that the tax was subsequently reduced to \$0.001 per gram for specified beverages as listed in the [Customs and Excise \(Amendment\) Notice, 2024 \(No. 5\)](#). The tax was further reduced to \$0.0005 per gram for cordials effective from January 1, 2025.

Ethanol Production

Zimbabwe introduced mandatory blending of fuel with ethanol in 2011. Currently, the minimum mandatory blending of vehicle fuels with ethanol is 20 percent, but the level varies depending on the domestic supply and availability of ethanol. Green Fuels had a monopoly on the production and supply of ethanol from cane sugar for fuel blending purposes. However, in 2019, Triangle Sugar was also licensed to produce and sell ethanol.

Green Fuels has over 14,000 ha under cultivation for sugar cane for the sole purpose of ethanol production. Triangle Sugar's ethanol production is estimated to range from 20 to 50 million liters annually.

Attachments:

No Attachments