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## **Report Name:** Sugar Annual

**Country:** Australia

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**Prepared By:** Zeljko Biki

**Approved By:** Lazaro Sandoval

### **Report Highlights:**

Australia's sugar production is forecast to increase by nine percent to 4.18 million metric tons (MMT) in marketing year (MY) 2026/27, from an estimated 3.83 MMT in MY 2025/26. Sugar cane production is projected to reach 30.7 MMT, an eight percent increase year-on-year, supported by both improved yields and a modest expansion in harvested area. The production increase reflects a return to a full growing cycle in MY 2026/27, following a shortened MY 2025/26 season caused by the late completion of the preceding harvest. Favorable seasonal conditions have supported a normal planting program and are expected to improve cane yields and sugar content. Raw sugar exports are forecast to rise significantly to 3.6 MMT in MY 2026/27, compared to an estimated 2.7 MMT in the previous year. Refined sugar exports are expected to remain stable at approximately 10,000 metric tons (MT). Domestic consumption, typically accounting for around 20 percent of production, is forecast to increase modestly due to population growth.

## EXECUTIVE SUMMARY

Australia's sugar production is forecast to increase to 4.18 million metric tons (MMT) in marketing year (MY) 2026/27, up from an estimated 3.83 MMT in MY 2025/26. Following two consecutive seasons of relatively low production—comparable to levels seen approximately 14 years ago—this forecast represents a return toward more typical historical output.

Sugar cane production is projected at 30.7 MMT, an increase of eight percent from the previous year, although still 1.9 percent below the 10-year average. This recovery is underpinned by several key factors. Most notably, the MY 2026/27 crop will benefit from a full growing season, unlike MY 2025/26, which was adversely affected by a very late finish to the harvest of the preceding crop. This delay resulted in approximately 2.7 percent of the crop being carried over as stand-over sugar cane, reducing sugar content for MY 2025/26. In contrast, favorable seasonal conditions in 2025 supported a normal planting program, and continued favorable conditions for the forecast crop are expected to deliver improved yields.

Rising input costs, particularly for diesel and nitrogenous fertilizers following developments in the Middle East, are not expected to affect MY 2026/27 production. Fertilizer applications were completed prior to the price increases, and crop yields are therefore unlikely to be impacted. However, elevated diesel prices are expected to increase the cost of harvesting and transporting cane to mills. Should these higher costs persist in the second half of 2026, there may be an adverse impact production for MY 2027/28.

Climatic risks also remain. The Australian Bureau of Meteorology and other international forecasters have indicated a potential El Niño event in 2026. While the MY 2026/27 crop is well advanced and unlikely to be significantly affected, such conditions could have a more pronounced impact on the MY 2027/28 season.

Domestic sugar consumption is forecast to increase modestly in MY 2026/27, driven primarily by population growth. Australia typically consumes around 20 percent of its sugar production and remains heavily export-oriented.

Exports continue to be dominated by raw sugar, which accounts for more than 99 percent of total shipments. Raw sugar exports are forecast to rise to 3.6 MMT in MY 2026/27, a substantial increase from an estimated 2.7 MMT in the previous year. This 33 percent increase exceeds the growth in production and largely reflects the slow pace of exports during MY 2025/26, resulting in carryover stocks. Given limited storage capacity at export terminals, this backlog is expected to necessitate higher export volumes in the forecast year. Refined sugar exports are expected to remain relatively stable at approximately 10,000 metric tons (MT).

# SUGAR CANE

## Overview

Sugar cane in Australia is grown along a 2,100-kilometer stretch of the eastern coastline, from the Atherton Tablelands in north Queensland (QLD) to Grafton in northern New South Wales (NSW). Climatic conditions vary along this corridor, ranging from tropical in north Queensland—with average annual rainfall of up to 3,500 mm (138 inches)—to subtropical conditions in northern NSW, where average rainfall is approximately 1,500 mm (59 inches).

The key growing regions (see Figure 1) and their characteristics are outlined below:

**North Queensland** Accounts for approximately 35 percent of national production. The region has a tropical climate with annual rainfall of up to 3,500 mm. Production is more frequently constrained by excessive rainfall than by drought.

*Following the closure of the Mossman sugar mill in March 2024, the Mulgrave mill near Cairns temporarily sourced cane via road transport with government support. This arrangement ceased at the end of MY 2025/26. Historically, the region produced over 1 MMT of cane, but output declined to approximately 180,000 MT in MY 2024/25.*

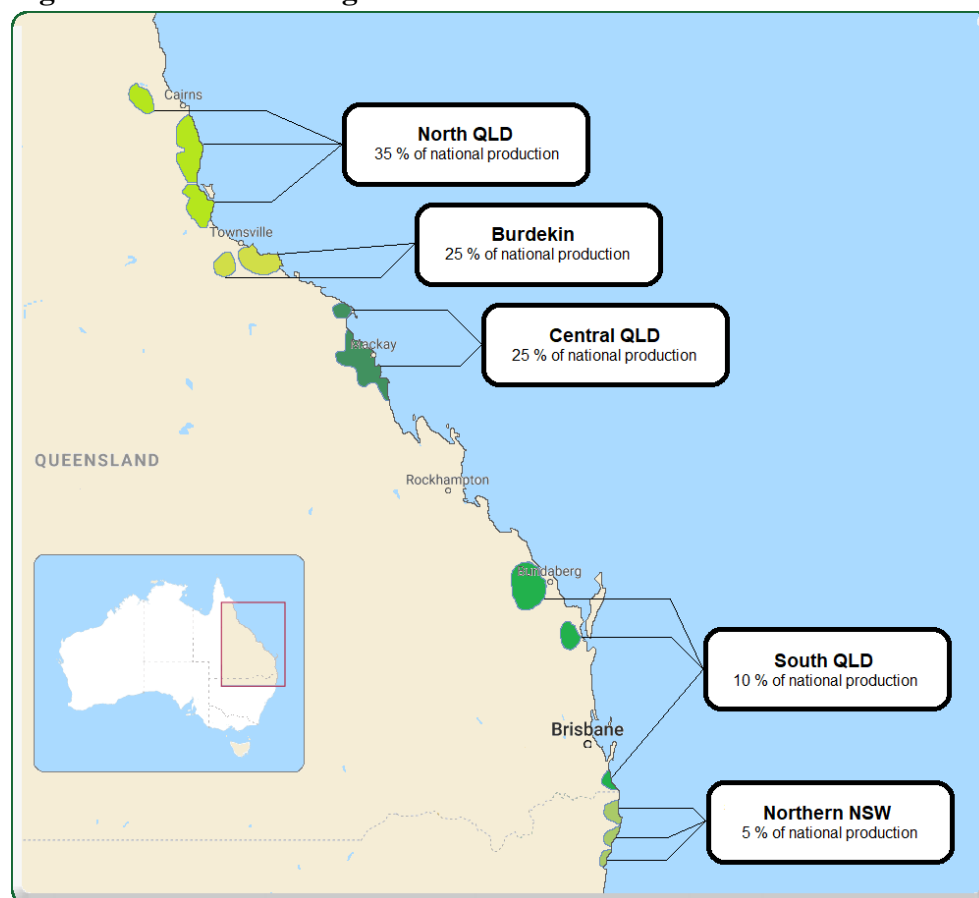
**Burdekin** Represents around 25 percent of national production. Despite its tropical location, the region receives less than 1,000 mm (39 inches) of rainfall annually and is highly dependent on irrigation. It is typically the highest-yielding region.

**Central Queensland** Contributes approximately 25 percent of production. The region experiences tropical conditions with average rainfall of around 1,500 mm (59 inches). Production systems vary, with some areas achieving strong yields under rainfed conditions, while others rely on supplementary irrigation following harvest.

**South Queensland** Accounts for around 10 percent of national production. This subtropical region receives approximately 1,100 mm (43 inches) of rainfall annually and is dependent on irrigation water availability.

**Northern NSW** Contributes approximately five percent of production. The subtropical climate features average rainfall of around 1,500 mm (59 inches). Cooler temperatures and lower humidity result in slower crop growth, with growing cycles ranging from 12 to 24 months depending on seasonal conditions.

**Figure 1 - Australian Sugarcane Production Areas**



Source: FAS/Canberra

## Production Environment

Australia's major sugar cane regions are predominantly tropical and rely on high rainfall and humid, sunny conditions during the wet season, which typically occurs from January to March. A favorable wet season is critical not only for current crop development leading into harvest, but also for establishing adequate soil moisture profiles for planting fallow and replant areas. In northern tropical regions, planting generally occurs between April and July. Wet season conditions also support ratoon regrowth following early harvest.

Follow-up rainfall after the wet season is also important, particularly when well-timed and moderate, as it supports final yield and sugar accumulation outcomes.

## Industry Structure and Marketing

Australia has approximately 3,044 sugar cane growers (ABARES Farm Survey Analysis, 2021) operating within a deregulated market environment. With 75 to 80 percent of production exported,

domestic sugar prices are closely linked to global markets, with the Sugar No. 11 futures contract serving as the primary benchmark.

Growers typically enter into three-year cane supply agreements with local mills. Although the industry was deregulated in 2006, mills initially retained a single-desk marketing system through Queensland Sugar Limited (QSL). This arrangement ended in 2017 following a transition period initiated in 2013. Growers can now choose to market their sugar through their supplying mill, QSL, or third-party marketers.

Risk management tools are increasingly utilized, with growers able to forward price a portion of production—typically up to three years in advance—to mitigate price volatility. The industry body Canegrowers has also implemented a “Pricing Essentials” program to improve grower capability in price risk management.

### **Production System**

Sugar cane is a perennial tropical C4 crop originating from New Guinea. It is established from billets (approximately 30 cm sections of cane stalk) planted in rows on raised beds to reduce waterlogging during high rainfall periods. After germination, plants tiller to produce 4–12 stalks.

The standard crop cycle is 12 months; however, in northern NSW it can extend to 24 months depending on climatic conditions. At harvest, the crop is cut just above ground level, and stalks are processed into billets for transport from the paddock by haulout wagons or trucks before being transported to the processing mill via small gauge rail or road transport.

Following the initial harvest, subsequent crops regenerate from the remaining root system (ratoons). Productivity typically declines with each ratoon, and growers usually maintain three to four ratoon crops before replanting. Farm management typically includes around 15 percent of land under fallow each year, particularly in tropical regions, with planting occurring from April to July. An additional 5–10 percent of area is replanted immediately after the final ratoon without a fallow period. These practices help maintain a balanced crop age profile and support relatively stable production over time. Fallow and replant systems differ in northern NSW due to its distinct climate.

### **Processing and Infrastructure**

There are 21 sugar mills (see Figure 2) processing sugar cane, typically from June to late November. Nine entities ranging from public listed companies to public unlisted companies; one private company and one cooperative are the mills’ owners.

The mills process sugar cane within 24 hours of harvest, producing raw sugar and by-products such as molasses, bagasse, ash and mill mud. Molasses is generally used in the animal feed industry, and one of the Wilmar mills in central Queensland also produces ethanol from molasses. Meanwhile, multiple mills

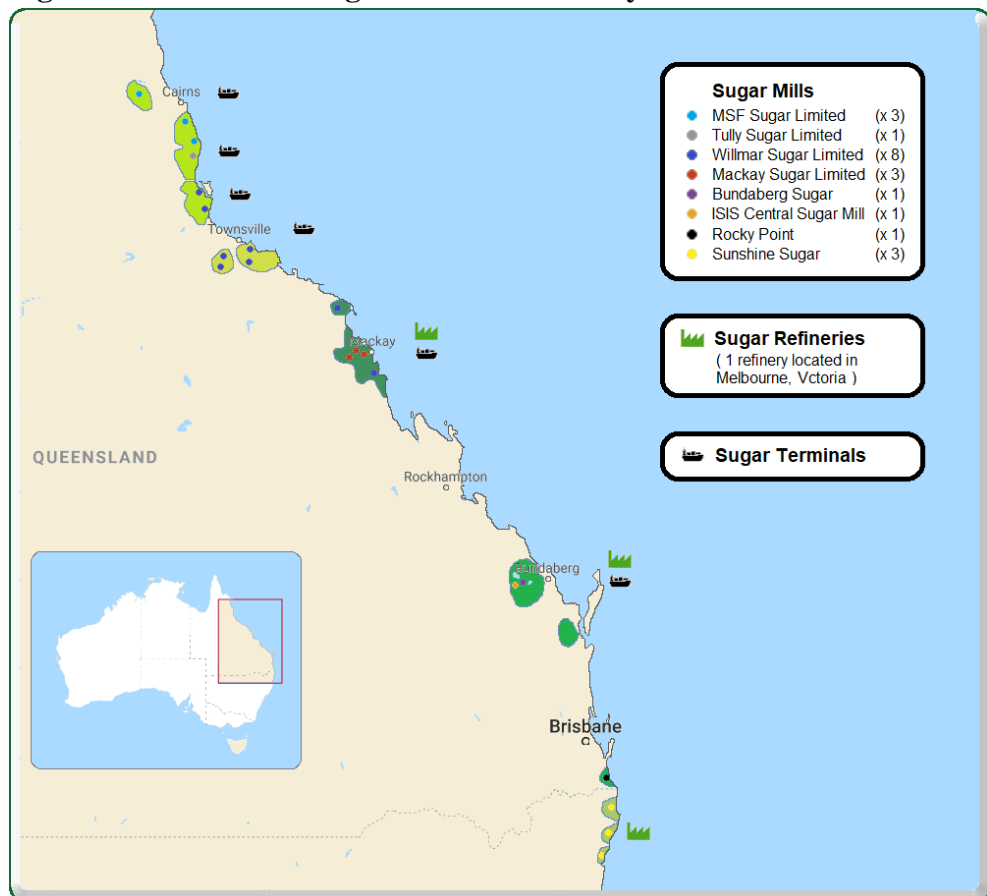
have cogeneration plants using bagasse to produce electricity for their own needs and surplus power is fed into the local electricity grid. Ash and mill mud are used as fertiliser by sugar cane producers.

Approximately 75 to 80 percent of raw sugar production is delivered and stored at one of six ports on the Queensland coast for subsequent export. A small amount of raw sugar is also domestically refined for consumption in Australia, and a relatively small volume of refined sugar is exported.

Australia has four sugar refineries owned by three entities. Three refineries are in the growing regions (see Figure 2), and one is in Melbourne, Victoria.

There are six ports where sugar is stored and loaded onto ships for export. These port facilities are all owned by Sugar Terminal Limited (STL), the major shareholder is QSL. Port management is expected to be fully transitioned back to STL in 2026 from QSL.

**Figure 2 – Australian Sugar Mill and Refinery and Port Terminal Locations**

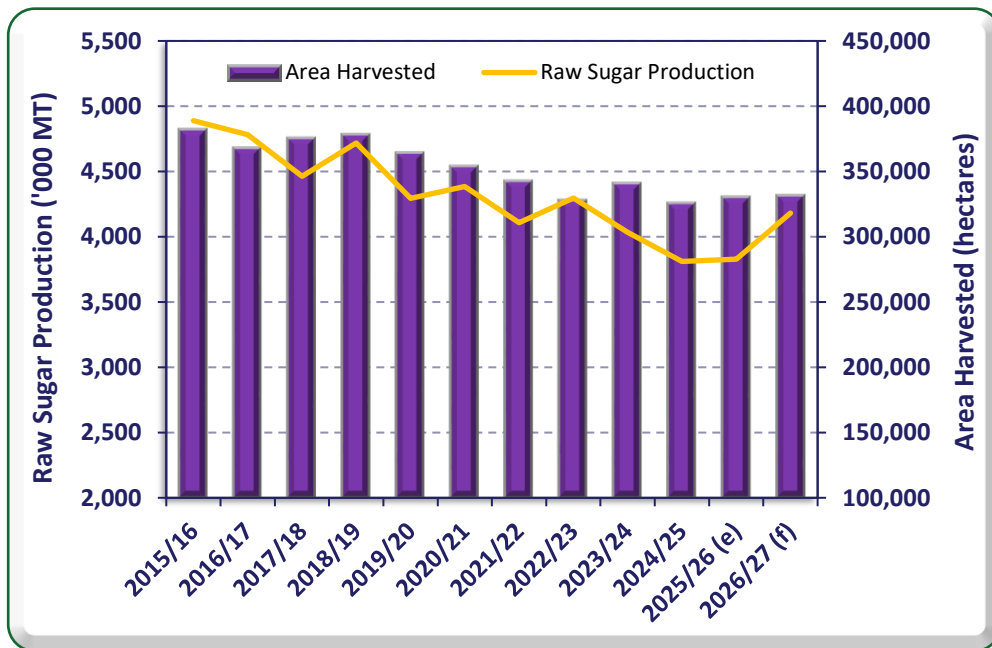


Source: FAS/Canberra using data from Australian Sugar Milling Council

## Production Variability and Key Drivers

Despite exposure to climatic variability, cyclones, and global price fluctuations, Australia's sugar production has historically been relatively stable. Over the past decade, raw sugar production has ranged between 3.81 MMT and 4.89 MMT (see Figure 3), representing variability of approximately  $\pm 10$  percent. Over this period, there has been a gradual decline in harvested area and output; however, following several difficult seasons, a modest recovery in area and production is anticipated in the near term.

**Figure 3 – Australian Sugar Cane Area and Raw Sugar Production History**



Source: Australian Sugar Manufacturers (ASM)

Note: (e) ASM Provisional results

Key factors influencing production include:

1. **Planting conditions** – Dry conditions at planting can reduce crop establishment and limit harvested area.
2. **Cyclones** – Periodic cyclone events, particularly in tropical regions, can significantly reduce yields, with recovery taking two to three seasons.
3. **Harvest conditions** – Excessive rainfall during harvest can delay operations and result in cane being carried over, which typically has higher yields but lower sugar content.
4. **Mill performance** – Significant mill disruptions can extend the crushing season, increasing current-year yields but shortening the subsequent growing cycle.
5. **Price signals** – Variability in global sugar prices influences grower sentiment, affecting both planted area and input intensity (e.g., fertilizer use).

Overall, the biological characteristics of sugar cane—including its annual growth cycle and ratooning system—provide a stabilizing effect on production, contributing to relatively consistent output from year to year.

## Production

### MY 2026/27 Production Estimate

FAS/Canberra forecasts sugar cane production for marketing year (MY) 2026/27 at 30.7 million metric tons (MMT), an eight percent increase from the MY 2025/26 estimate of 28.4 MMT. Despite this recovery, production remains 1.9 percent below the previous 10-year average of 31.3 MMT.

The projected increase in production is driven by three primary factors:

- A timely completion of the prior year harvest
- Improved seasonal conditions enabling a full replanting program
- Favorable conditions for crop development

While these factors underpin the MY 2026/27 outlook, several broader influences may affect the industry beyond the forecast year.

### Impact of Timely Completion of the Prior Harvest

A full growing cycle for the MY 2026/27 crop is expected to support higher yields and improved sugar content compared to the previous season.

In MY 2025/26, the preceding harvest was significantly delayed, with completion extending into mid-January in central Queensland—more than a month later than the typical finish—due to unseasonal rainfall during the harvest period. Several other regions also experienced delayed harvests.

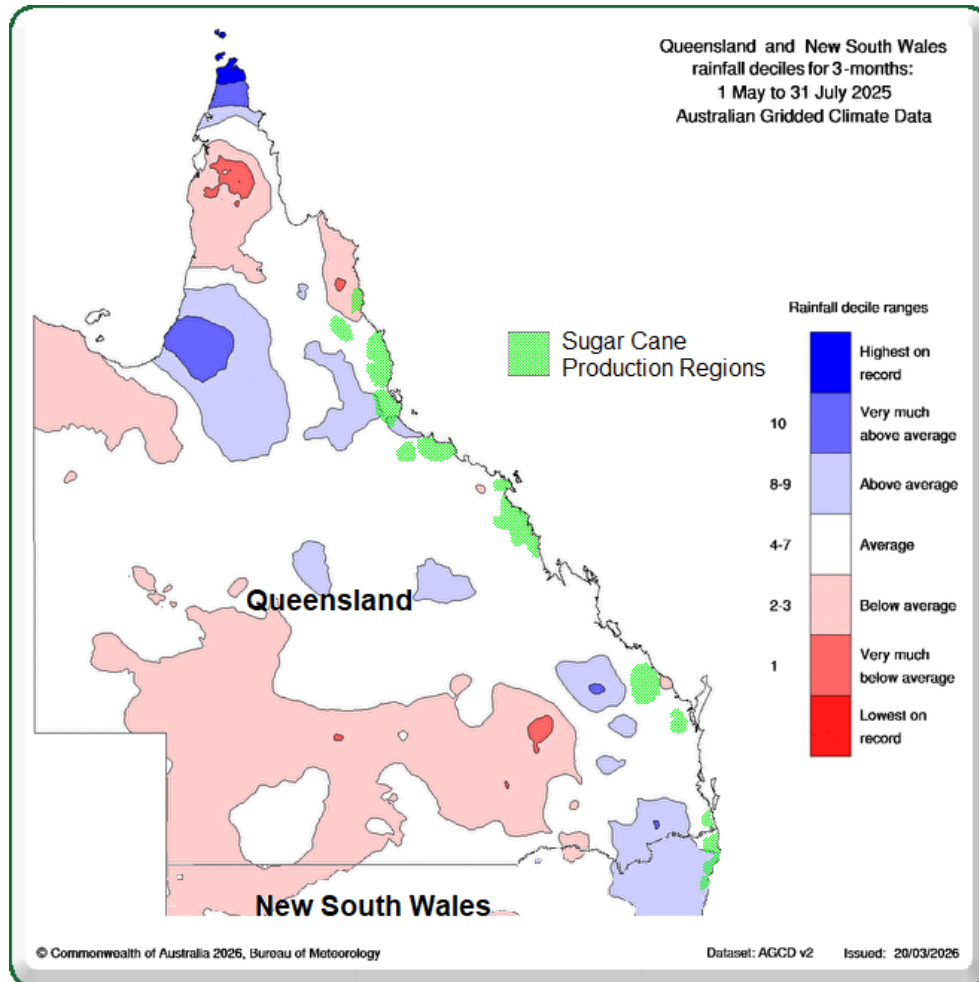
By contrast, the MY 2025/26 harvest itself was completed by mid-December, with no stand-over cane carried into the forecast year. However, the earlier delays in the production cycle resulted in a shortened growing period for that crop, constraining yields. The return to a normal harvest schedule and full growing period in MY 2026/27 is therefore expected to lift yields and overall production.

### Planting and Harvest Area

Sugar cane replanting typically occurs between April and July, depending on weather and soil conditions. In the lead-up to and early stages of the 2025 planting window, above-average rainfall in March and April disrupted operations in some regions. However, conditions from May through July were generally favorable, with near-average rainfall across most growing areas (see Figure 4).

This enabled a complete planting program, in contrast to recent seasons that were affected by excessive rainfall. As a result, a modest increase in harvested area is forecast for MY 2026/27, contributing to higher national sugar cane production.

**Figure 4 – Rainfall Decile Map - May to Jul 2025**



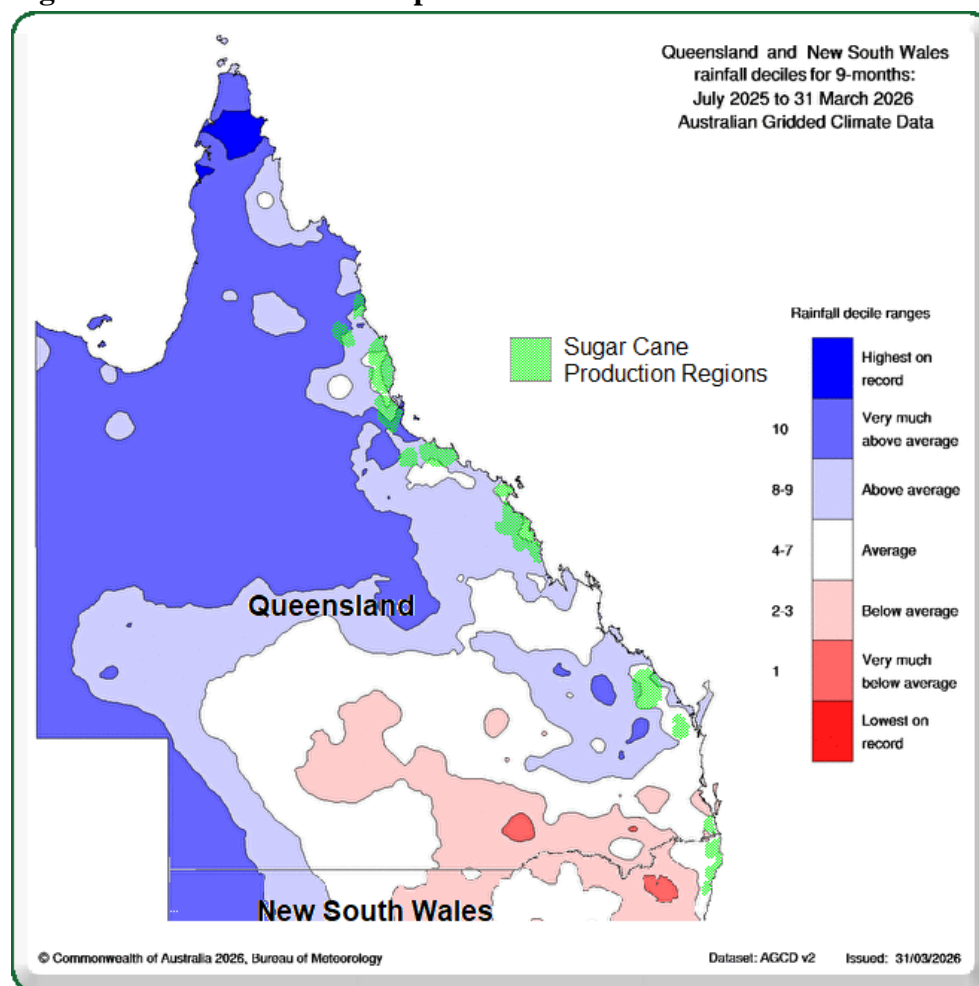
Source: Australian Bureau of Meteorology / FAS/Canberra

### Seasonal Conditions and Crop Development

Seasonal conditions for the MY 2026/27 crop have been broadly favorable. Across most growing regions, rainfall during the nine-month period from July 2025 to March 2026 was average to above average (see Figure 5). Importantly, there were no prolonged periods of either excessive dryness or waterlogging.

These balanced conditions supported effective crop management, allowing timely application of fertilizers and implementation of weed and pest control measures. In addition, the absence of extended overcast periods—particularly in central and northern Queensland—ensured adequate sunlight for crop growth, which is critical for biomass accumulation and sugar development.

**Figure 5 – Rainfall Decile Map – Jul 2025 to Mar 2026**



Source: Australian Bureau of Meteorology / FAS/Canberra

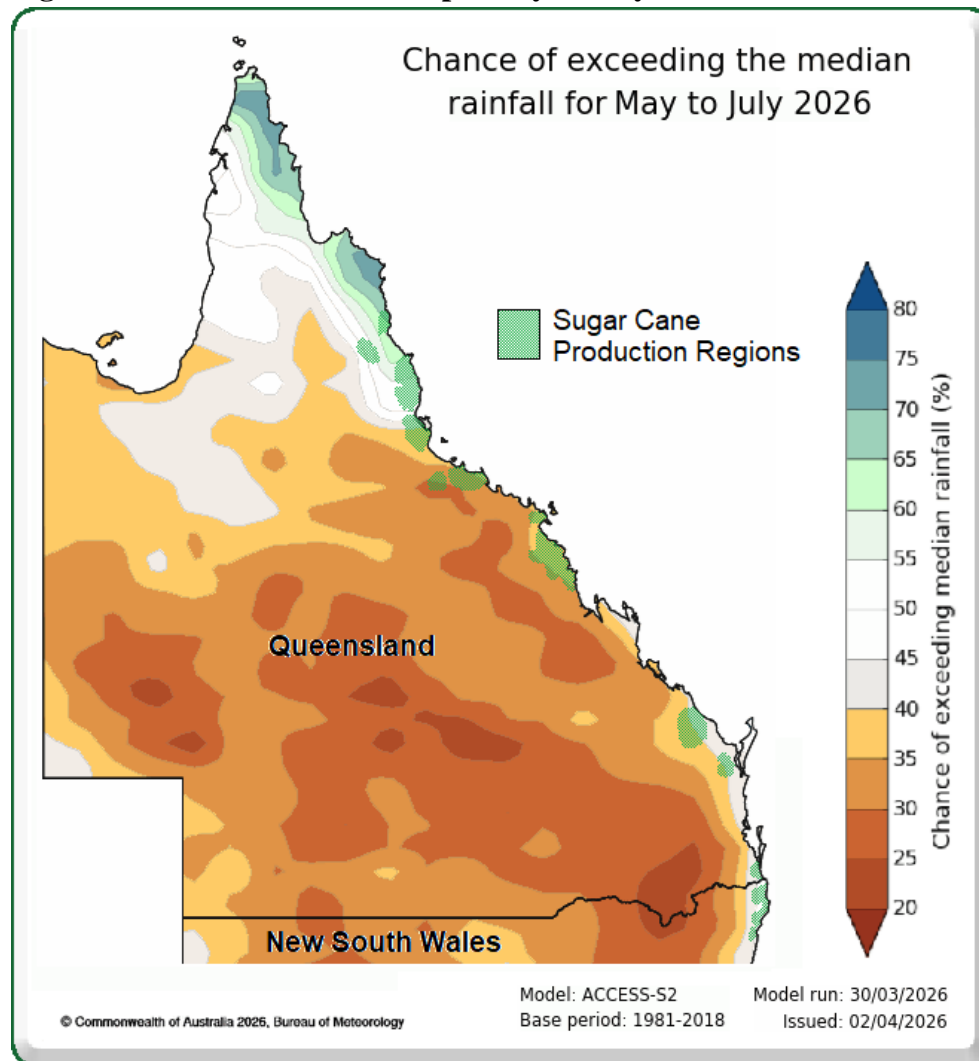
### Short-Term Weather Outlook

As of early April 2026, the crop is approaching harvest, which typically begins in late May. Moderate rainfall following the wet season and during early harvest can support yield outcomes.

The Australian Bureau of Meteorology forecasts a lower probability of above-median rainfall across most major sugar-producing regions in the May to July period, with the exception of north Queensland. (see Figure 6).

Other than for southern Queensland and northern New South Wales, which equate to a little over five percent of national production, the tropical wet season period was favorable for the MY 2026/27 crop (see Figure 5). Industry sources indicate that after better than average wet season rains the crops will benefit from drier conditions leading into harvest, allowing fields to dry and improve harvest efficiency.

**Figure 6 - Rainfall Forecast Map - May to July 2025**



Source: Australian Bureau of Meteorology / FAS/Canberra

Looking ahead, the Australian Bureau of Meteorology and other international forecasting agencies are currently indicating that there is an increasing chance that an El Niño will form during 2026 which is typically associated with drought conditions in Australia. This is unlikely to significantly affect the MY 2026/27 crop, which is already well advanced. However, it may pose a risk to the MY 2027/28 season if wet season rainfall is substantially reduced.

### **Impact of Middle East Developments**

Developments related to the Middle East situation from late February 2026 has disrupted global energy and fertilizer markets. Diesel prices have approximately doubled, and nitrogenous fertilizer prices have more than doubled.

These increases are not expected to affect MY 2026/27 production, as fertilizer applications for the current crop have already been completed. However, if elevated fertilizer prices persist, they could influence input decisions and production outcomes in MY 2027/28.

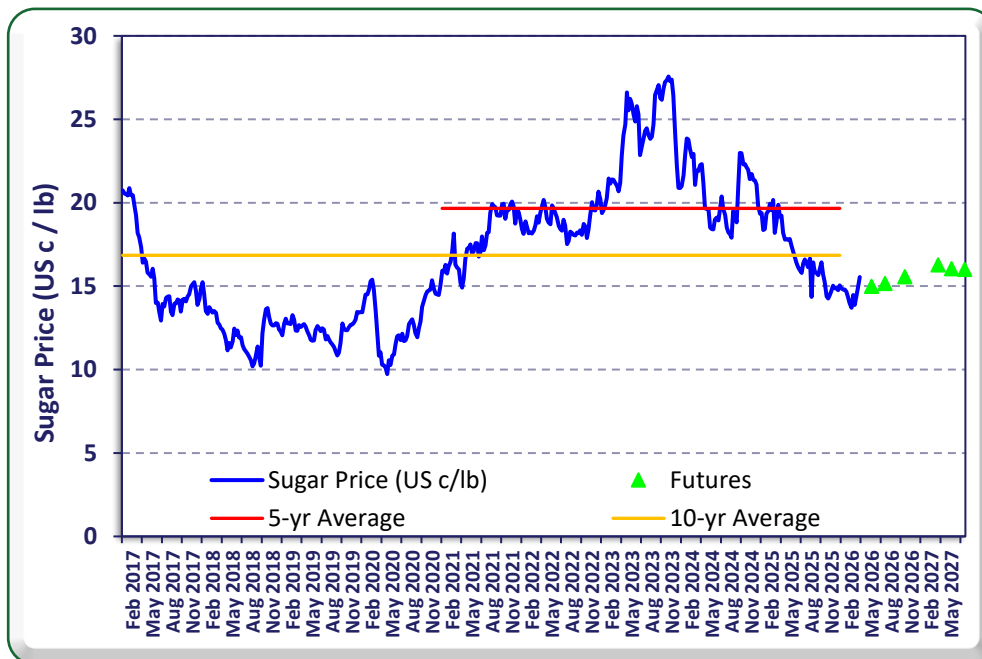
Higher diesel prices are expected to increase harvesting and transport costs during MY 2026/27. While this will reduce grower margins, it is not expected to affect production volumes for the current season.

**Market Conditions**

Global sugar prices are currently around 15 U.S. cents per pound, below the 10-year average of just under 17 U.S. cents per pound. Futures prices for 2027—which are most relevant for the MY 2026/27 crop—indicate only a modest recovery to around 16 U.S. cents per pound (see Figure 7).

These price levels do not reflect the recent sharp increase in input costs and are unlikely to incentivize production expansion.

**Figure 7 – ICE Sugar #11 – Historical and Futures Price Trends**



Source: Intercontinental Exchange (ICE) #11  
[www.investing.com](http://www.investing.com) - historic and futures prices as at April 08, 2026

Notes: Chart data points are weekly averages

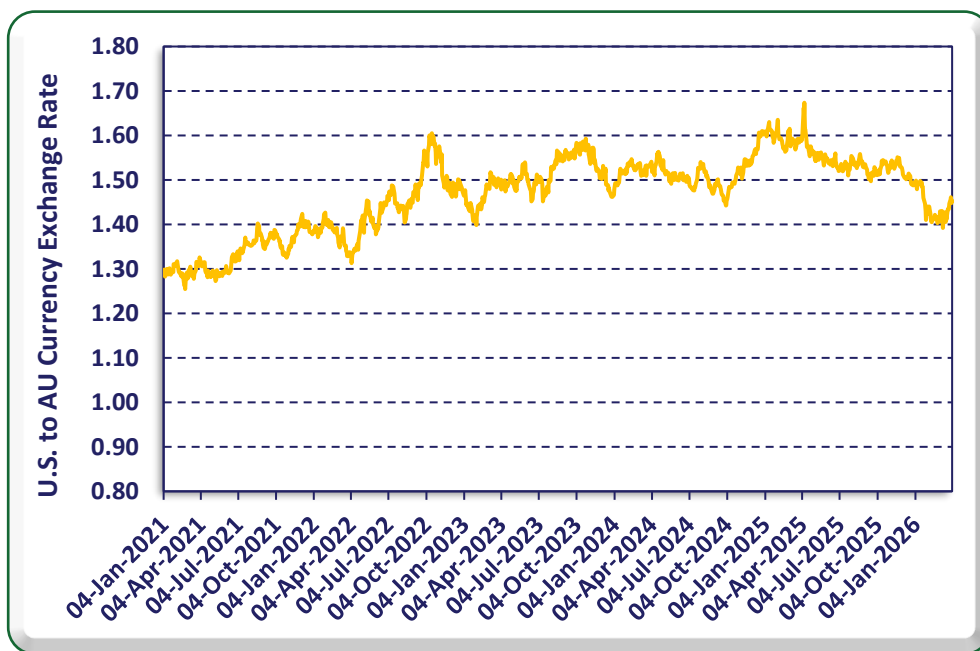
**Exchange Rate Movements**

The Australian dollar appreciated by approximately six percent between mid-January and mid-February 2026, reaching its highest level since early 2023 (see Figure 8).

This appreciation reflects, in part, monetary policy divergence. The Reserve Bank of Australia has raised interest rates, while other major economies, including the United States, have eased or anticipate an easing cycle. The current Middle East situation has changed the outlook, however the situation in Australia was influenced by a pre-existing increase in inflationary pressure. For this reason, the anticipation of a widening differential rates remains and is likely to support further currency strength through capital inflows.

A stronger Australian dollar reduces export competitiveness and places downward pressure on domestic sugar prices. Given the industry’s export orientation, this—combined with relatively weak global prices—is unlikely to encourage production expansion beyond the forecast year.

**Figure 8 – US:AU Currency Exchange Rate – 2021 to Mar 2026**



Source: Reserve Bank of Australia

**MY 2025/26 Production Estimate**

FAS/Canberra has revised the MY 2025/26 sugar cane production estimate downward to 28.4 MMT, from an earlier forecast of 29.9 MMT. This revision is based on final harvest data from Australian Sugar Manufacturers (ASM).

At the start of the harvest, ASM estimated production at 29.9 MMT. This was briefly revised upward to 30.0 MMT around the midpoint of the harvest before being progressively downgraded as the season progressed.

## SUGAR

### Production

#### **MY 2026/27 Production Forecast**

FAS/Canberra forecasts Australia's sugar production at 4.18 MMT in MY 2026/27, representing a 9.1 percent increase from the MY 2025/26 estimate of 3.83 MMT. This increase is primarily driven by higher sugar cane production, along with an improvement in sugar content. The forecast marks a return to production above 4.0 MMT following two relatively low production seasons in MY 2024/25 and MY 2025/26.

Sugar content, measured by commercial cane sugar (CCS), is expected to improve in MY 2026/27 due to a full growing season. In contrast, the MY 2025/26 crop experienced a shortened growing period following the very late completion of the MY 2024/25 harvest, which extended into mid-January rather than concluding in early December. A full growing cycle allows the crop to reach optimal maturity at harvest, supporting higher CCS levels.

In addition, an estimated 2.7 percent of the MY 2024/25 crop was left unharvested and carried over into MY 2025/26. This carryover cane typically has lower sugar content, which adversely affected the average CCS for MY 2025/26.

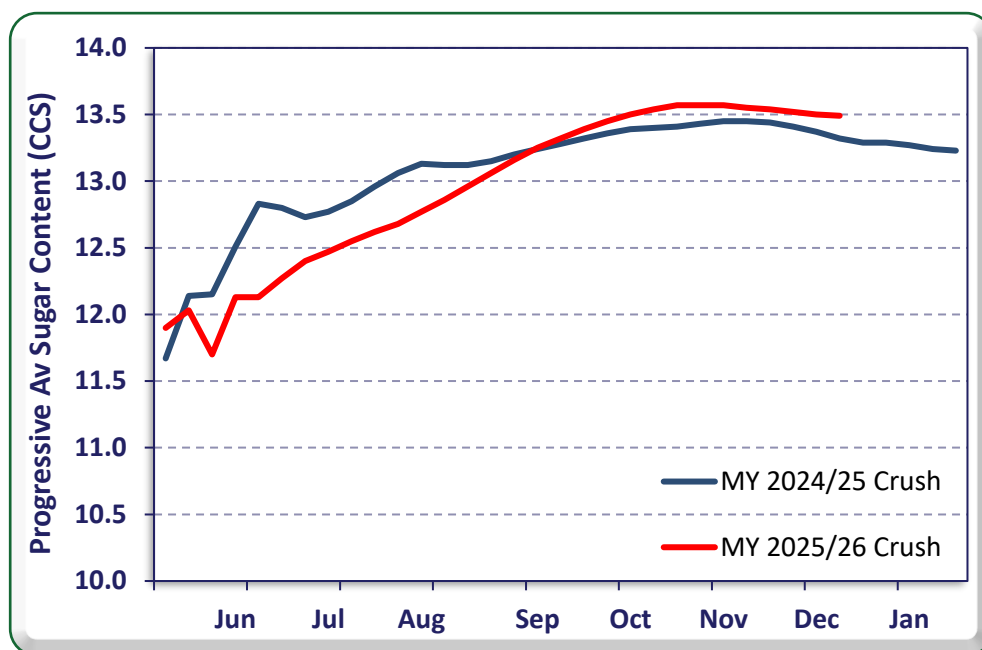
#### **MY 2025/26 Production Estimate**

FAS/Canberra estimates sugar production at 3.83 MMT for MY 2025/26, approximately 20,000 MT (0.5 percent) below MY 2024/25, despite only a marginal decline in sugar cane production.

Sugar content was initially low during the early stages of the harvest, partly because harvesting focused on the significant volume of carryover cane from MY 2024/25, which has inherently lower CCS. In addition, the delayed completion of the MY 2024/25 harvest resulted in less mature cane being harvested early in the MY 2025/26 season, further reducing initial CCS levels.

As the harvest progressed and more mature cane was processed, CCS levels improved. By the midpoint of the season, sugar content was higher than in the previous year, allowing cumulative CCS for MY 2025/26 to ultimately exceed that of MY 2024/25 (see Figure 9).

**Figure 9 – Sugar Cane Harvest, Progressive CCS – MY 2024/25 to MY 2025/26**



Source: Australian Sugar Manufacturers

Note: CCS is a measure of sugar content in sugar cane

## Consumption

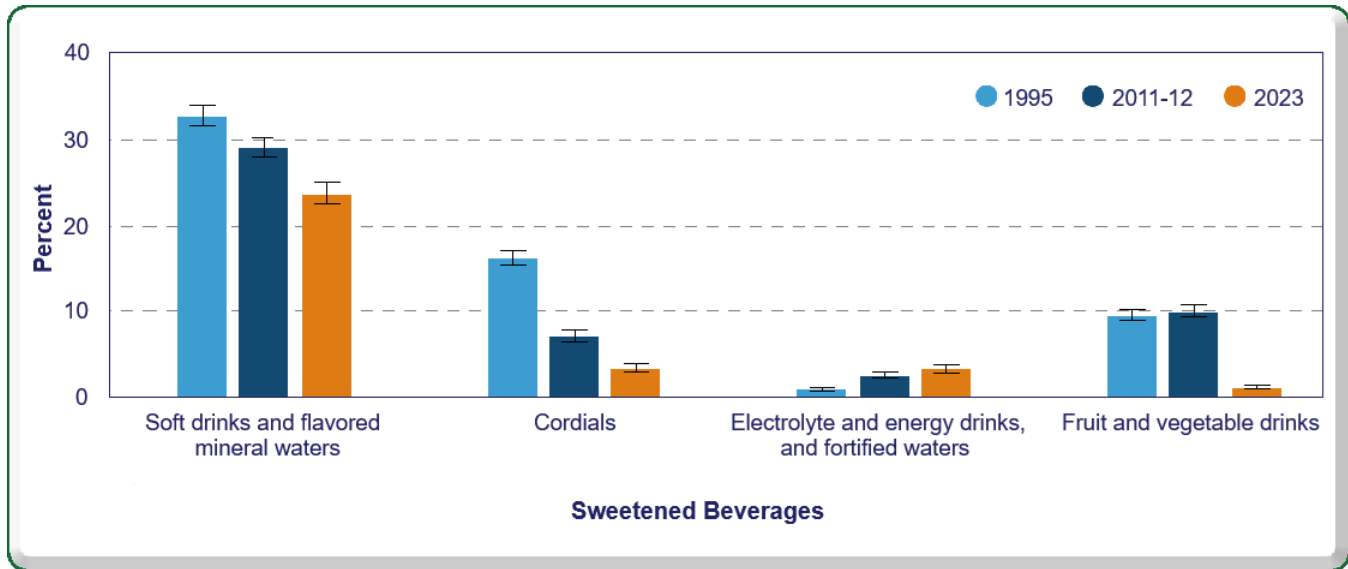
### MY 2026/27 Raw Sugar Consumption Forecast

Domestic sugar consumption is forecast to increase modestly to 940,000 MT in MY 2026/27, up from an estimated 930,000 MT in MY 2025/26. This one percent increase is primarily driven by population growth.

Australia’s population growth was approximately 1.6 percent per annum as of September 2025, broadly in line with the long-term trend. However, growth in total sugar consumption continues to be partially offset by declining per capita consumption.

Consumers in Australia are becoming increasingly health conscious. Data from the Australian Bureau of Statistics (ABS) indicates a long-term decline in sugar intake over the past three decades. For example, the proportion of people consuming sweetened beverages fell from 49.2 percent in 1995 to 28.9 percent in 2023. This decline has been driven by reduced consumption of soft drinks, cordials, and fruit-based beverages, although there has been some growth in categories such as electrolyte drinks, energy drinks, and fortified waters (see Figure 10).

**Figure 10 – Australian Sweetened Beverage Consumption Trend – 1995 to 2023**



Source: Australian Bureau of Statistics – Sweetened Beverages 2023

**MY 2025/26 Raw Sugar Consumption Estimate**

FAS/Canberra estimates domestic sugar consumption at 930,000 MT in MY 2025/26, an increase of 10,000 MT from the previous year. As with the forecast year, this growth largely reflects population increases and is partially offset by declining per capita consumption associated with rising health awareness.

**Trade**  
*Exports*

**MY 2026/27 Raw Sugar Export Forecast**

FAS/Canberra forecasts raw sugar exports for MY 2026/27 at 3.6 MMT, an increase of 22 percent from the MY 2025/26 estimate of 2.7 MMT. This substantial rise reflects both higher forecast production and the carryover of surplus stocks resulting from lower-than-anticipated exports in MY 2025/26.

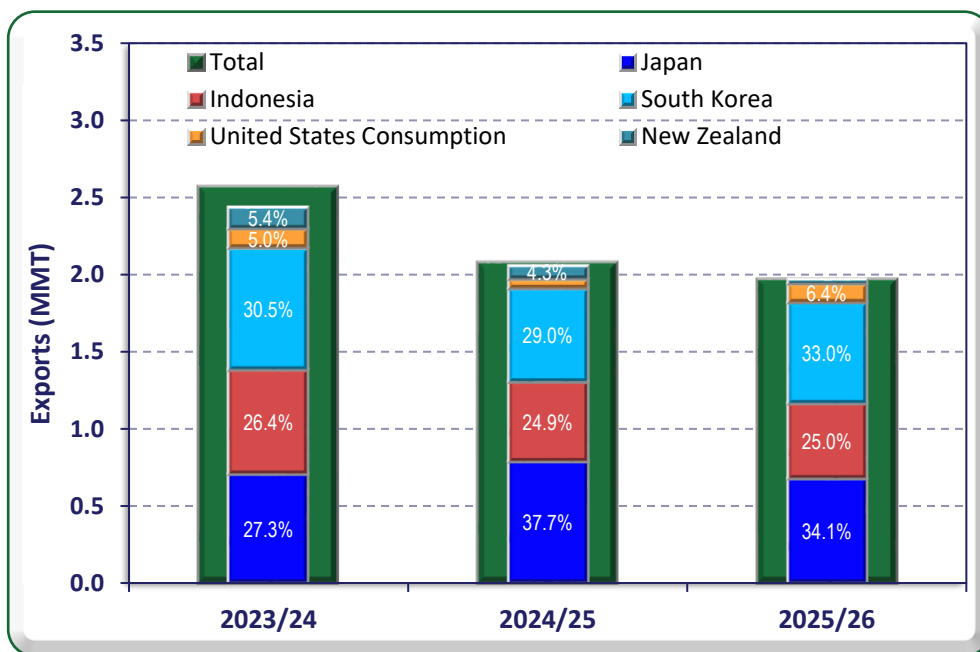
Global sugar prices have remained relatively low and flat, indicating ample world supply. Under such conditions, importers typically show less urgency in securing supply, which has contributed to weaker export demand during MY 2025/26. The resulting stock buildup is expected to carry into MY 2026/27. Combined with a modest strengthening in sugar futures prices, this is anticipated to support an increase in export volumes in the forecast year.

Approximately 80 percent of Australia’s sugar production is exported, with raw sugar accounting for more than 99 percent of these exports. The remainder consists of refined sugar. Due to relatively high production costs, Australia’s refined sugar exports have declined significantly over the past decade—

from around 200,000 MT to approximately 20,000 MT—and no meaningful recovery is expected in the near term.

Australia’s raw sugar export market remains highly concentrated. Japan, Indonesia, and South Korea have consistently been the major destinations, collectively accounting for 85 to 95 percent of exports (see Figure 11). New Zealand and the United States account for most of the remaining share. This trade pattern is expected to remain stable in MY 2026/27.

**Figure 11 – Major Importers of Australian Raw Sugar (July to February)**



Source: Trade Data Monitor (data as reported by importing countries)

### MY 2025/26 Raw Sugar Export Estimate

FAS/Canberra estimates raw sugar exports at 2.7 MMT for MY 2025/26, significantly below the previous forecast of 3.2 MMT made six months earlier.

Imports of Australian raw sugar by partner countries during the marketing year-to-date (July 2025 to February 2026) has been lower than anticipated at 2.1 MMT. Some acceleration in export shipments is anticipated in the remaining months of the marketing year, as exporters seek to reduce inventories and make storage capacity available for the incoming MY 2026/27 crop. However, this is unlikely to fully offset the earlier slowdown.

### MY 2026/27 Refined Sugar Export Forecast

FAS/Canberra forecasts refined sugar exports to remain unchanged at 7,000 MT in MY 2026/27.

Refined sugar exports are minimal, with Papua New Guinea, Bangladesh, Hong Kong, and Taiwan currently the primary destinations. In recent years, markets such as Kiribati and New Caledonia have reduced imports from Australia in favor of alternative suppliers. Given the small export base, refiners have the flexibility to adjust production in line with demand.

Although Australia retains significant refining capacity, exports have declined sharply from historical levels. Prior to MY 2018/19, refined sugar exports averaged around 200,000 MT annually, largely destined for Singapore. Given Australia’s relatively high cost structure, a significant recovery in refined sugar exports is unlikely in the short to medium term.

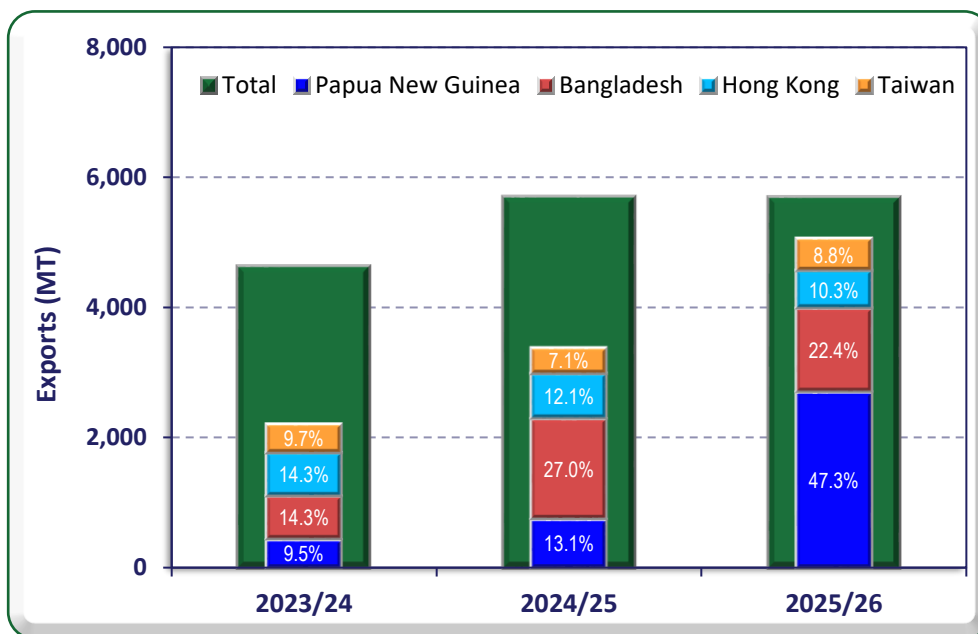
### MY 2025/26 Refined Sugar Export Estimate

FAS/Canberra estimates refined sugar exports at 7,000 MT for MY 2025/26, unchanged from the previous year.

Export volumes during the first eight months of MY 2025/26 reached 5,700 MT, consistent with the same period in the prior year and in line with full-year expectations. Papua New Guinea has emerged as the dominant destination, while Bangladesh, Hong Kong, and Taiwan continue to account for a stable share of exports. Collectively, these four markets represent nearly 90 percent of Australia’s refined sugar exports (see Figure 12).

Given Australia's high production costs relative to key competitors, a significant resurgence in refined sugar exports appears unlikely in the short to medium term.

**Figure 12 – Major Export Destinations of Australian Refined Sugar (July to February)**



Source: Trade Data Monitor

## *Imports*

Australia’s refined sugar imports remain minimal, accounting for just over one percent of domestic consumption. FAS/Canberra forecasts imports to remain steady at 10,000 MT in MY 2026/27, unchanged from the MY 2025/26 estimate.

## **Stocks**

End-of-year sugar stocks in Australia are typically low, reflecting the close alignment between the harvest cycle and the marketing year. However, beginning stocks for MY 2026/27 are expected to be higher than usual due to the slower-than-anticipated pace of exports in MY 2025/26.

The subdued export performance is linked to relatively low global sugar prices, which reduced importer urgency. Looking ahead, a modest increase in sugar futures prices is expected to support stronger export demand in MY 2026/27, contributing to some reduction in stock levels by the end of the marketing year.

The sugar cane harvest begins in late May, shortly before the start of the marketing year in July. Export shipments typically accelerate from July—approximately one month after harvest commences—and remain strong through December, following the usual completion of the harvest in early December. From January to June, exports generally decline as stocks are drawn down in preparation for the next harvest.

For both MY 2025/26 and MY 2026/27, stocks are not expected to be fully depleted prior to the commencement of the subsequent harvest season, reflecting the accumulation of inventory during the current period of weaker export demand.

**Table 1 - Production, Supply, and Distribution of Sugar Cane**

Sugar Cane for Centrifugal Market Year Begins	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Australia						
<b>Area Planted</b> (1000 HA)	0	0	0	0	0	0
<b>Area Harvested</b> (1000 HA)	335	326	0	331	0	332
<b>Production</b> (1000 MT)	29500	28800	0	28400	0	30700
<b>Total Supply</b> (1000 MT)	29500	28800	0	28400	0	30700
<b>Utilization for Sugar</b> (1000 MT)	29500	28800	0	28400	0	30700
<b>Utilizatn for Alcohol</b> (1000 MT)	0	0	0	0	0	0
<b>Total Utilization</b> (1000 MT)	29500	28800	0	28400	0	30700
(1000 HA) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

**Table 2 - Production, Supply, and Distribution of Centrifugal Sugar**

Sugar, Centrifugal Market Year Begins	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Australia						
<b>Beginning Stocks</b> (1000 MT)	788	788	1102	1062	0	1266
<b>Beet Sugar Production</b> (1000 MT)	0	0	0	0	0	0
<b>Cane Sugar Production</b> (1000 MT)	3850	3810	4000	3830	0	4180
<b>Total Sugar Production</b> (1000 MT)	3850	3810	4000	3830	0	4180
<b>Raw Imports</b> (1000 MT)	2	2	2	2	0	2
<b>Refined Imp.(Raw Val)</b> (1000 MT)	9	9	10	9	0	10
<b>Total Imports</b> (1000 MT)	11	11	12	11	0	12
<b>Total Supply</b> (1000 MT)	4649	4609	5114	4903	0	5458
<b>Raw Exports</b> (1000 MT)	2620	2620	3180	2700	0	3600
<b>Refined Exp.(Raw Val)</b> (1000 MT)	7	7	7	7	0	7
<b>Total Exports</b> (1000 MT)	2627	2627	3187	2707	0	3607
<b>Human Dom. Consumption</b> (1000 MT)	920	920	935	930	0	940
<b>Other Disappearance</b> (1000 MT)	0	0	0	0	0	0
<b>Total Use</b> (1000 MT)	920	920	935	930	0	940
<b>Ending Stocks</b> (1000 MT)	1102	1062	992	1266	0	911
<b>Total Distribution</b> (1000 MT)	4649	4609	5114	4903	0	5458
(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

**Attachments:**

No Attachments