ANNUAL REPORT 2000



PAKISTAN SUGAR MILLS ASSOCIATION
ISLAMABAD

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PAKISTAN SUGAR MILLS ASSOCIATION
ISLAMABAD

MANAGEMENT OF PAKISTAN SUGAR MILLS ASSOCIATION FOR 2000-2002

CENTRAL EXECUTIVE COMMITTEE

1.	Mr. Ashraf W Tabani	Chairman
2.	Ch. Mohammad Zaka Ashraf	Vice Chairman
3.	Mr. Shunaid Qureshi	Vice Chairman
4.	Mr. Iskander M Khan	Vice Chairman
5.	Sardar Nasrullah Khan Dreshak	Member
6.	Mr. Aslam Faruque	Member
7.	Mr. Abdul Qadir Khattak	Member

SECRETARIAT

MR. K. ALI QAZILBASH SECRETARY GENERAL

> RASHID PLAZA, JINNAH AVENUE ISLAMABAD

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ZONAL COMMITTEES

2000-2002

ZONAL COMMITTEE PUNJAB

Ch. Mohammad Zaka Ashraf
 Mr. Mohammad Apwar Wahla

Mr. Mohammad Anwar Wahla
 Mr. Pervaiz A. Chaudhry
 Member

4. Mian Shahryar Saigol Co-opted Member

Zonal Secretariat

Col. (Retd.) Maqsood Cheema Secretary

 Unit No. 1, Happy Homes
 Tel: 042-5710190

 38-A, Main Gulberg, Lahore
 Fax: 042-5752940

ZONAL COMMITTEE SINDH

1. Mr. Shunaid Qureshi Chairman

Mr. Naveed Muhammad Javeri
 Brig (Retd.) Ghulam Khaja
 Member

Zonal Secretariat

Mr. Umer Latif Secretary

1st, Floor, Tel: 021-5686526 Modern Motors House fax: 021-5680344

Beaumont Road, Karachi

ZONAL COMMITTEE N.W.F.P

Mr. Iskander M. khan
 Mr. Abdul Qadir Khattak
 Member

3. Ch. M. Ashiq Khalid Member

Zonal Secretariat

Premier Sugar Mills & Tel:0931-62051-52

Distillery Co. Ltd, Mardan Fax: 0931-62989

ANNUAL REVIEW 35TH ANNUAL GENERAL MEETING KARACHI 30TH SEPT, 2000

Distinguished members of Pakistan Sugar Mills Association,

I feel honoured, to present the Annual Report of Pakistan Sugar Mills Association, here at 35th Annual General Meeting. The report covers 1999-2000 season and hence, first of its kind, as we step in new millennium. Beside occasional meetings, we had four Central Executive meetings during the term 1998-2000, which ends by the conclusion of this meeting, as the retiring management of the PSMA will now be replaced by the newly elected teams, on Central and Zonal levels.

Production 1999-2000

At the start of the season, after having produced over 3.5 million tonnes of sugar for the past two successive years, the expectations were high. Though preliminary data provided to us by the Government of Pakistan showed about 13% reduction in the crop area, yet from a large area of 1,010,000 Hectares, sugar production was fairly predicted as 3.2 million tonnes at early stages. With 371,000 tonnes of carryover stocks on 30th Sept'1999, an exportable surplus of atleast 200,000 tonnes was expected.

During our CEC meeting on 1st March'2000, shortage of sugarcane, its slow supply and the price hike was fully realized and highlighted. Mills working under capacity were forced to pay high prices of sugarcane to avoid stoppages. Earlier, though shortage of sugarcane was realized, hopes were still high due to the improvement in the recovery, which also later ended as marginal.

Appreciating the situation, it was agreed that PSMA in a responsible and candid way should inform the Government about the shortfall expected in last couple of months of the

season. Government was advised for a well-monitored import of sugar at the required stage, as mills were then holding 1.2 million tonnes of sugar stocks.

Campaign 1999-2000 was extremely short. Sindh was short supplied by over 4.0 million tonnes of sugarcane, while Punjab suffered short supply of over 8.0 million tonnes. Among mills in Punjab only 5 mills exceeded 140 days crushing, while in Sindh only one or two mills crossed 140 days. With such a short supply it was very hard to agree with the statistics provided by the Government, which still maintained that over 46 million tonnes of sugarcane was produced at a yield rate of 45.88 in comparison to preceding year's yield of 47.77 per hectare.

Such tampered figures instead of providing any guidance to the Government, the growers, millers and finally the traders and consumers, ends up in a disaster and future incorrect policy decisions.

The responsible agencies instead, remain busy in highlighting payment to the growers, their arrears, and advocating further higher support price as the only successful way of increasing a particular crop. They being shy of accepting the crop failure, freely use the print and electronic media blaming mills for all the ills, and divert attention from facts on ground.

Sugar season ended in March having produced 2.4 million Tonnes with arrears of 371,000 tonnes, total available thus was 2.88 million tonnes. With short fall in sight, sales remained over active till the month of May' 2000, averaging as high as 275,000 tonnes per month between December'99 and May'2000, leaving only 600,000 tonnes in stock. Thus for the remaining five months import of minimum of 550,000 tonnes became unavoidable, out of which nearly 350,000 tonnes has already landed.

Main reason of crop failure was shortage of rains and irrigation water, wide spread infestation, lack of research and development work with continuation of degenerated quality of sugarcane. On top of this lot of damage was done in the central Punjab due to enhancement in electricity charges on tube wells during the mid crop important period. Standing immature sugarcane crops were cut for fodder. Such tube wells supplemented canal irrigated areas which, were already facing drought like situation, were stopped, causing total damage of sugarcane crop.

In case the production of sugarcane is accepted as 46.33 million tonnes, then after deduction of 15% for seed and fodder etc. 29.0 million tonnes was utilized by the mills. Thus the remaining 10.38 million tonnes was supposedly utilized for Gur making, which means 1.35 million tonnes of Gur was produced. We generally provide figures for "Gur Equivalent" at the rate of 8.5%, which shows that if the cane was not converted, an equivalent to 880,000 tonnes of sugar, gur must have been produced, which shows an increase of 165%. Gur prices in the retail market are running parallel to the refined sugar prices i.e. between Rs.22/- to Rs. 27/- per Kg. This shows that Gur production has equally suffered and its production was not as big as statistics would show. Therefore PSMA would not hesitate saying that sugarcane crop did not exceed 40 million tonnes with an average yield of not more than 40 tonnes per hectare, a matter of concern to all of us.

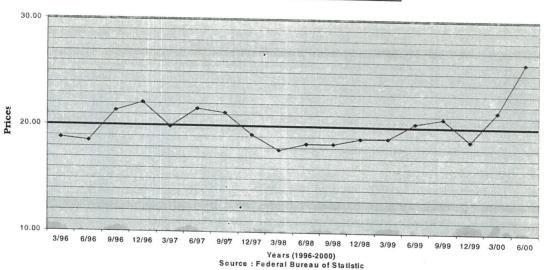
Tax free production of Gur is another loop hole wasting major part of crop due to inefficient extraction, evasion of taxes, effecting sugarcane supplies to the mills, and enjoying 50% higher price than sugar as Gur contains only 61% sugar.

Prices & Marketing 1999-2000

Sugar prices continued depressed well into the midseason. At the end of crushing, as soon as necessity of import of sugar due to shortfall was known, the prices of sugar started

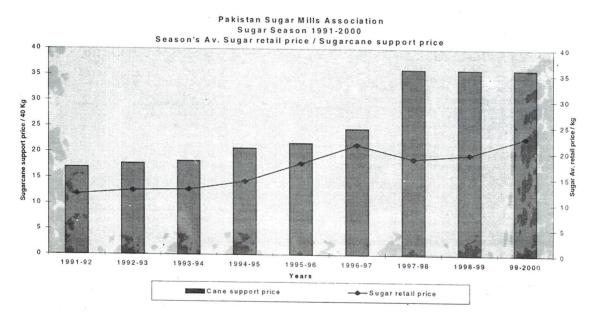
improving. During the year'2000 for the first time in four years retail price of sugar crossed Rs.22/- per Kg. For the purposes of price statistics we keep referring retail prices as it is regularly maintained by the Government agencies and it is widely known that Mill gate prices are generally Rs. 3/- to 4/- below the market retail price. Though process of export was completed in May'99 yet sugar prices remained low for a period of over a year, till the glut like conditions ended. (See table below)

Domestic Retail Sugar Prices 1996-2000



Quarterly Retail Sugar Prices March'1996 to Sept'2000 Months							
Years	March	June	September	December	Av. Price		
1996	18.77	18.56	21.36	22.11	20.19		
1997	19.88	21.55	21.20	19.19	20.98		
1998	17.77	18.36	18.40	18.90	18.36		
1999	18.96	20.34	20.79	18.76	19.90		
2000	21.47	25.26	27.87		22.07		

Escalation in the production cost of sugar has been due to high cost of sugarcane with low recovery, high taxation and high interest rates charged by the Banks and DFIs. With sugarcane support price still enforced no similar mechanism exists for the sugar. The industry continuously suffered due to its production cost / sale price non-equilibrium. Without adopting a sound strategy, the industry will continue to suffer. The production cost of sugar remained between Rs. 20/- to 22/- depending on different factors. Table presented below shows that the <u>sugar price could not respond to the increase in the sugarcane price for a period of three years</u>, due to domestic surplus production and similar crash in the international sugar trade price due to global surplus.



Season Year	91-92	92-93	93-94	94-95	95-96	96-97	97-98	98-99	99-00
Sugarcane Support Price	16.75 17.00	17.50 17.75	18.00 18.25	20.50 20.75	21.50 21.75	24.25 24.50	35.00 36.00	35.00 36.00	35.00 36.00
Sugar Av. Retail Price	11.85	12.62	12.80	14.36	17.86	21.46	18.75	19.63	22.85

Pakistan Sugar Mills Association

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Forecast for Season 2000-2001

Sugarcane plantation area intimated to us shows a further decrease of 6% over the sugarcane area of last year. With 950,000 hectares planted, present crop conditions are encouraging. Our members in last CEC meeting arrived at a sugar production estimate of 2.7 million tonnes, which indicates that prices shall remain stable. Table under review shows production 2000-2001 estimates with an overview on past Six years.

Siv Vaare Summary Sugar And Su

Six Years Summary Sugar And Sugarcane							
Year	1994-95					1999-2000	Est. 2000-2001
Sugarcane Area HA.	1,009,000	963,100	964,500	1,056,200	1,166,000		950,000
Sugarcane produced	47,168,400	45,229,700	41,998,400	53,104,200	55,191,100		45,000,000
Yield / Ha-Tonnes	46.75	47	43.54			45.88	47.40
Cane Utilized by Mills	34,193,290	28,151,434	27,352,918		42,994,911	28,982,711	32,000,000
% age of utilization	75.49	62.24			77.90	62.55*	73.30
Sugar Production	2,983,101	2,449,598	2,378,751	3,548,953	3,530,931	2,414,746	2,670,000
Recovery %age	8.72	8.70	8.69	8.64	8.21	• 8.33	8.35
No. of Mills	66	66	68	71	73	69	0.00
Cane support. price Punjab, NWFP/ Sindh	20.5 / 20.75	21.5 / 21.75	24.25 / 24.5	35 / 36	35 / 36	35/36	25/25
Season's Av.Dom. retail price Rs. / Kg	14.36	17.86	21.46	18.75	19.63		35/36
Av. Inter. export price US\$ / Tonnes	396.12	383.75	319.25	272.46	216.28	22.85	
Total Sale up to 30th Sep.	2 ,736,784	2,366,481	1,980,072	3,042,165	3,170,374	2,402,090	•
Beginning Stocks 1st Oct.	309,309	264,659	103,553	413,290	513,062	371,389	27,274
Imports Cane + Beet	5,188	3,214	681,083	110,990	10,097	462,439	21,214
Production	3,001,472	2,470,034	2,393,362	3,555,228	3,541,763	2,429,364	
Total Available	3,315,969	2,737,907	3,177,998	4,079,508	4,064,922	3,263,192	
Export	315,886	29,134	-	457,471	616,095	NIL	· · · · · · · · · · · · · · · · · · ·
Consumption	2,735,395	2,605,220	2,764,708	3,108,975	3,077,438	3,235,918	
End Stocks	264,689	103,553	413,290	513,062	371,389	27,274	ay an although a ball

Sugar Season 1st Oct. to 30th Sept.

Exports and other data are to 30th Sept.

Av. International price (Source LIFFE LONDON)

Av. Domestic retail price Rs. / Kg (Source MINFAL)

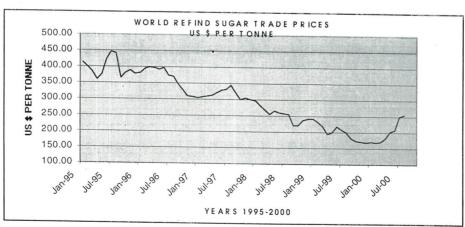
[★]Sugarcane production & utilization figures for 1999-2000 are controversial

 ²⁰⁰⁰⁻²⁰⁰¹ Estimated

Since the country is faced with the low production of sugarcane and sugar, it has become more important to avoid wastage of sugarcane and efforts, estimated to the tune of Rs. 1.5 billion, by starting the mills at lowest recovery period of sugarcane. At our 4th CEC meeting after giving it due consideration the start of crushing was decided as 15th Nov. for the mills in Sindh and 25th Nov. for Punjab and mills of Southern N.W.F.P.

Global Outlook

The world sugar production is expected to drop for the first time in six years, ending long consecutive years of growth. Global estimates show 6% decrease in the sugar production for the year 2000-2001. Brazil's production is estimated 26% below last year, mainly due to short cane crop caused by dry weather and increased cane utilization for alcohol. Similarly European Union, India, Australia and few other main producers have recorded decrease for the year 2000- 2001. High-accumulated stocks will help to keep the consumption and trade in balance, though quantitatively lower trade is foreseen. The international trade prices have already started picking up after a long period of continuous fall from US\$ 447/- in July 1995 to as low as US\$ 168/- per tonne in Dec 1999 as shown in the graph below.



Revival of Sugar Industry

International high prices of sugar in the past with the exception of the recent few years, and the development in the recent months, once again confirm self-sufficiency as an important and strategic factor for the revival of sugar industry.

Very responsible people got carried away by the low international prices, comparing them with the domestic production cost of high inputs and the international trade price, which is based on global surplus. This situation gave them a superficial but temporary ground challenging viability of the sugar industry. Failure of crop 1999-2000 and short production of sugar causing import worth 200 million US\$ should be an eye opener. Year 2000-2001 is going to repeat similar scenario to meet the shortage for domestic consumption. In a recent address even the Hon. Finance Minister put a question mark indirectly on the viability of sugarcane crop on the basis of irrigation water consumption proportionate to other cash crop. The answer of all such objection viability of the industry lies in Research & Development.

With Rs. 60 billion outlay 78 sugar mills in Pakistan has the production capacity of over 5.0 million tonnes of sugar per year, the sugar industry could not get Government's proper attention. Economic realities have always been ignored. In the absence of sugar sustainable policy it is not possible to find rational solution to the anomalies and problems of both, the farmers and the millers. The dangerous drift, regarding viability of the sugar industry or the sugarcane crop and exploitation of farmers against the millers would not bring any positive effect for the country. To face W.T.O. conditions and globalization effects a very strong workable approach is to be adopted. Farmers and millers interests are alike, both have to afford, to operate.

In the recent past when Government of Pakistan asked us to identify the means to revitalize the sugar industry. PSMA submitted its suggestions in the shape of "Long Term Policy" which mainly emphasized, linkage of price of sugarcane with the recovery, increase in per acre yield, research and development for qualities of sugarcane in a given time frame suitable to our environments. Similar submissions were made in the past too.

The revival of the sugar industry and sugarcane farmers jointly lies in the cost effectiveness and competitiveness of its product. To face the globalization effects we have to work hard to bring our product to the level of international competitiveness. In this context

present policy to import raw sugar could lead to permanent dependency on the raw sugar rather than the qualitative and quantitative revolutionary improvement in the sugarcane crop, while the industrial infra- structure is already there to meet the future challenges.

Sugar industry's pending issues

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Beside many inherited sugar industry issues, few new issues have cropped up during the recent years, which were identified as "Short Term Irritants". The subject was designated by the Hon. Commerce Minister himself and later asked for it through "Expert Advisory Cell" appointed by him. The report including all such issues that needed immediate attention, were submitted on 13th April'2000 with time to time reminders, but unfortunately no response has yet been received.

Members of the sugar industry are forced to seek protection from courts, entangled in long legal procedures in search of just resolutions. During all our high level meetings with the Federal Ministers most of these issues were discussed which received fovourable response, but surprisingly no further action is taken.

At conclusion, I must thank the Central Executive Committee, Chairmen and Zonal Committees for their immense co-operation. I must register my appreciation to secretarial staff at Centre and Zonal Offices. PSMA's elected management is replaced regularly every two years as a result of elections. The names of the new elected team will be announced later at this meeting. I, on behalf of myself and on behalf of the retiring Executive Committee welcome them assuring our best co-operation. Thank you,

S.M.Tahir (Chairman PSMA) Karachi (Septmber'2000)

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TABLE 1
SUGARCANE CRUSHING, SUGAR PRODUCTION
& RECOVERY % 1988-89 TO 1999-2000

PAKISTAN

YEAR	NO. OF MILLS	CANE CRUSHED TONNES	SUGAR MADE TONNES	RECOVERY %
1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99	45 48 51 53 61 63 66 66 68 71 71	21,707,520 20,501,339 22,603,696 24,795,815 27,274,806 34,181,899 34,193,290 28,151,434 27,152,918 41,062,268 42,994,911 28,982,711	1,817,935 1,828,904 1,908,838 2,296,698 2,375,289 2,900,523 2,983,101 2,449,598 2,378,751 3,548,953 3,530,931 2,414,746	8.37 8.92 8.44 9.25 8.71 8.49 8.72 8.70 8.76 8.64 8.21 8.33
PUNJAB				
1987-88 1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99 1999-00	20 21 23 24 25 32 34 36 37 37 39 39	9,547,071 8,288,070 9,151,085 12,094,630 11,745,224 13,433,045 20,066,265 20,975,836 16,992,633 16,293,237 25,905,541 25,081,066 16,829,610	777,938 666,983 765,133 933,721 1,012,297 1,103,531 1,634,154 1,771,084 1,375,789 1,292,912 2,065,886 2,033,356 1,315,637	8.15 8.05 8.36 7.72 8.62 8.22 8.14 8.44 8.10 7.94 7.97 7.80 7.82

SINDH

YEAR	NO. OF MILLS	CANE CRUSHED TONNES	SUGAR MADE TONNES	RECOVERY
1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99 1999-00	19 20 22 24 24 24 24 27 27 27 29 25	11,922,974 10,457,782 9,597,884 11,956,718 12,723,563 13,031,888 12,037,995 10,341,372 10,314,835 13,853,107 15,095,412 10,856,757	1.013,600 983,087 902,311 1,187,576 1,175,195 1,172,507 1,107,880 1,008,127 1,028,169 1,374,477 1,353,012 996,317	8.50 9.40 9.40 9.93 9.24 9.00 9.20 9.75 9.97 9.92 8.96 9.18
N.W.F.P.				
1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99 1999-00	05 05 05 05 06 06 06 05 04 05 05	1,496,476 892,472 911,182 1,093,873 1,118,197 1,083,745 1,179,458 817,429 744,845 1,303,619 1,818,433 1,296,344	137,352 80,684 72,806 96,824 96,562 93,861 104,136 65,682 57,669 108,589 144,563 102,792	9.18 9.04 7.99 8.85 8.64 8.66 8.83 8.19 7.74 8.33 7.95 7.93

TABLE 2
BEET SUGAR PRODUCTION, BEET SLICED,
SUGAR MADE & RECOVERY BY NWFP SUGAR MILLS

YEAR	NO.OF MILLS	BEET SLICED TONNES	SUGAR MADE TONNES	REC. %	MOLASSES MADE TONNES
1988-89	04	341,377	31,806	9.32	13,679.00
1989-90	04	342,198	27,057	7.90	14,443.00
1990-91	03	282,103	23,312	8.26	8,636.00
1991-92	03	314,758	29,009	9.21	12,840.00
1992-93	03	214,950	18,916	8.80	8,649.00
1993-94	04	242,482	21,933	9.05	9,392.00
1994-95	04	193,595	18,371	9.49	7,412.30
1995-96	03	211,670	20,435	9.65	7,738.00
1996-97	03	166,875	14,610	8.76	6,115.00
1997-98	02	81,794	6,267	7.66	3,127.00
1998-99	03	126,123	10,831	8.59	5,069.00
1999-00	03	187,478	14,618	7.80	7,750.00

TABLE 3
CONSOLIDATED SUGAR PRODUCTION IN PAKISTAN
(IN TONNES)

YEAR	SUGARCANE	BEET	TOTAL
1988-89	1,817,935	31,806	1,849,741
1989-90	1,828,904	27,057	1,855,961
1990-91	1,908,838	23,312	1,932,150
1991-92	2,296,698	29,009	2,325,707
1992-93	2,375,289	18,916	2,394,205
1993-94	2,900,524	21,933	2,922,457
1994-95	2,983,104	18,370	3,001,472
1995-96	2,449,598	20,435	2,470,034
1996-97	2,378,751	14,610	2,393,361
1997-98	3,548,953	6,267	3,555,220
1998-99	3,530,931	10,831	3,541,763
1999-00	2,414,746	14,618	2,429,364

TABLE 4
CANE MOLASSES PRODUCTION IN PAKISTAN
(IN TONNES)

YEAR	PAKISTAN	PUNJAB	SINDH	NWFP
1988-89	1,100,591	395,584	649,550	55,457
1989-90	980,087	421,883	526,029	32,175
1990-91	1,119,978	611,033	473,432	35,513
1991-92	1,168,158	545,125	581,683	41,350
1992-93	1,330,419	632,055	652,789	45,575
1993-94	1,694,852	972,827	676,790	45,235
1994-95	1,650,952	1,010,890	592,067	47,994
1995-96	1,361,471	821,298	503,692	36,481
1996-97	1,319,860	798,448	482,636	32,661
1997-98	1,978,801	1,237,940	684,823	56,038
1998-99	2,113,595	1,276,391	760,533	76,670
1999-00	1,397,378	800,536	534,003	62,838

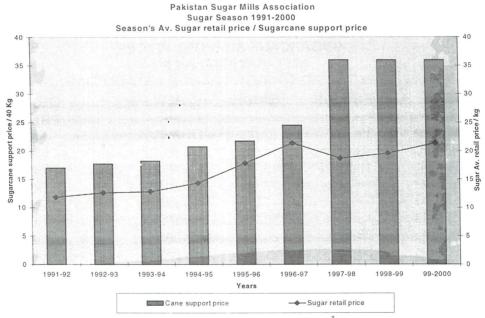
TABLE 5 (1)
SUGARCANE SUPPORT PRICES
MILL-GATE DELIVERY

YEAR	PUNJAB	SINDH	N.W.F.P	QUALITY
1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99	11.75 13.75 15.25 16.75 17.50 18.00 20.50 21.50 24.25 35.00 35.00	12.00 14.00 15.75 17.00 17.75 18.25 20.75 21.75 24.50 36.00 36.00 36.00	11.60 13.50 15.25 16.75 17.50 18.00 20.50 21.50 24.25 35.00	0.18 0.19 0.19 0.22 0.22 0.22 0.27 0.27 0.27 0.27 0.32 0.50
	20.00	00.00	35.00	0.50

Prices are per 40 kg of sugarcane.

TABLE 5(2)
SUGARCANE SUPPORT PRICES IN COMPARISON
WITH SEASON'S AVERAGE RETAIL PRICES

YEAR	PUNJAB	SINDH	NWFP	AVE. SUGAR PRICE/KG
1988-89	11.75	12.00	11.60	10.13
1989-90	13.75	14.00	13.50	11.76
1990-91	15.25	15.75	15.25	11.04
1991-92	16.75	17.00	16.75	11.85
1992-93	17.50	17.75	17.50	12.62
1993-94	18.00	18.25	18.00	12.80
1994-95	20.50	20.75	20.50	14.36
1995-96	21.50	21.75	21.50	17.86
1996-97	24.25	24.50	24.25	21.46
1997-98	35.00	36.00	35.00	18.75
1998-99	35.00	36.00	35.00	19.63
1999-00	35.00	36.00	35.00	22.85



Sugarcane support price is per 40 Kg Sugar Retail Price is Season's Average Source: MINFAL

TABLE 6 (1)
MILLWISE SUGARCANE CRUSHING,
SUGAR PRODUCTION, RECOVERY AND
MOLASSES PRODUCTION FOR SEASON 1999-2000

	PUNJAB	NO OF	CANE		REC	MOL.	REC
		DAYS	CRUSHED	PRODUCTION	%	PRODUCTIO	N %
1	ADAM	138	302,440	25,237	8.35	12,215	4.04
2	ASHRAF	120	276,664	24,671	8.93	14,700	5.31
3	BABA FARID	128	335,992	24,100	7.17	16,735	4.98
4	BROTHERS	134	645,522	47,665	7.39	31,440	4.87
5	CHANAR	135	449,882	32,056	7.12	22,990	5.10
6	CHAUDHARY	132	635,159	46,578	7.32	30,050	4.72
7	CHISTIA	132	338,466	25,443	7.42	17,332	5.12
8	CRESCENT	122	218,481	14,983	6.86	10,350	4.74
9	FATIMA	128	536,787	43,664	8.14	26,928	5.02
10	FAUJI	152	437,864	33,661	7.68	20,397	4.65
11	FECTO	119	525,115	37,881	7.23	23,785	4.53
12	GOJRA SAM	127	224,300	15,526	6.92	11,128	4.96
13	HAMZA (Hyesons)	117	333,230	32,550	9.77	14,043	4.21
14	H.WAQAS	128	469,252	35,788	7.62	22,928	4.88
15	HUSEIN	127	435,733	32,047	7.35	20,958	4.81
16	ITTEFAQ	135	526,527	39,087	7.43	26,255	5.00
17	J.D.W	131	488,665	45,025	9.21	22,424	4.59
18	KAMALIA	135	527,884	40,123	7.60	24,491	4.64
19	KASHMIR	129	589,396	48,278	8.19	27,514	4.66
20	KOHINOOR	142	455,470	37,048	8.13	20,803	4.57
21	LAYYAH	125	329,580	25,064	7.61	16,540	5.02
22	MEDINA	112	391,483	27,817	7.09	18,987	4.85
23	NATIONAL	140	507,097	40,480	7.98	23,557	4.66
24	NOON	137	353,980	28,305	8.00	16,304	4.60
25	PAHRIANWAL	128	402,604	30,887	7.67	20,295	5.04
26	PATTOKI	135	366,320	26,849	7.33	17,458	4.77
27	PHALIA	131	492,342	36,938	7.50	23,549	4.78
28	PUNJAB	137	429,758	38,849	9.06		4.55
29	RAMZAN	131	623,536	46,760	7.50	30,737	4.93
30	SHAHTAG	119	659,847	51,922	7.87	29,563	4.48
31	SHAKARGANJ	144	524,377	39,965	7.63	24,243	4.62
32	SHEIKHOO	128	647,146	54,344	8.40	31,652	4.89
33	TANDLIANWALA	138	621,889	44,265	7.11	32,090	5.16
			to the same that the same test	,		02,000	0.10

PUNJAB	NO OF DAYS	CANE CRUSHED	PRODUCTION	REC %	MOL. PRODUCTION	REC %
34 UNITED NON-MEMBERS	94	125,097	9,053	7.90	5,990	4.79
35 ABDULLAH 36 INDUS 37 YOUSAF	133 116 143	531,426 313,522 756,778	39,313 29,232 64,185	7.40 9.32 8.48	25,200 14,467 32,848	4.74 4.62 4.34
TOTAL 1999-2000 TOTAL 1998-99		16,829,610 26,081,066	1,315,637 2,033,356	$\frac{7.82}{7.80}$	800,536 1,276,392	4.76 4.89

TABLE 6 (2)

MILLWISE SUGARCANE CRUSHING, SUGAR PRODUCTION, RECOVERY AND MOLASSES PRODUCTION FOR SEASON 1999-2000

N.W.F.P		NO OF	CANE CRUSHED	PRODUCTION	REC %	MOL. PRODUCTION	REC I %
38	BANNU	104	168,644	12,758	7.60	7,900	4.70
39	CHASHMA	122	668,578	53,495	8.00	37,615	5.62
40.	FRONTIER	103	65,512	5,324	8.12	2,124	3.24
41	KHAZANA	105	184,265	15,137	8.20	7,419	4.03
42	PREMIER	96	209,345	16,078	7.68	7,780	3.74
TO:	TAL 1999-2000		1,296,344	102,792	7.93	62,838	4.85
TO	TAL 1998-99		1,818,433	144,563	7.95	76,670	4.22

TABLE 6 (3)

MILLWISE SUGARCANE CRUSHING, SUGAR PRODUCTION, RECOVERY AND MOLASSES PRODUCTION FOR SEASON 1999-2000

	OINDII	NO OF			REC	MOL.	REC
4	SINDH	DAYS		PRODUCTION	%	PRODUCTION	%
1	AL-ABBAS	124	502,333	47,572	9.48	27,110	5.93
2	AL-NOOR	132	728,987	59,175	8.13	36,074	4.95
3	ANSARI	130	491,757	47,270	9.62	24,704	5.03
4	ARMYWELFARE	132	418,919	39,290	9.37	20,307	4.84
5	BAWANY	96	258,689	23,801	9.33	11,920	4.64
6	DEWAN	129	867,739	86,350	9.95	42,923	4.95
7	DIGRI	124	367,726	33,761	9.18	18,135	4.93
8	FARAN	124	645,771	60,445	9.36	29,205	4.52
9	FAUJI- KH	139	455,264	40,323	8.85	21,720	4.77
10	FAUJI- TMK	145	475,336	43,716	9.20	22,359	4.70
11	HABIB	123	668,811	56,664	8.47	31,971	4.78
	KHAIRPUR	. 117	261,583	21,665	8.28	12,424	4.75
13	LARR	121	281,109	26,824	9.55	13,731	4.89
14	MATIARI	118	407,895	38,249	9.38	20,131	4.94
15	MEHRAN	109	437,621	40,765	9.30	22,610	5.15
16	MIRPURKHAS	104	337,448	30,774	9.13	18,154	5.37
17	MIRZA	124	252,626	24,033	9.51	12,102	4.79
18	PANGRIO	120	222,676	20,891	9.35	11,440	5.12
19	RANIPUR	125	302,381	24,958	8.25	14,043	4.65
20	SAKRAND	120	504,046	42,320	8.38	24,755	4.91
21	SANGHAR	109	383,068	33,925	8.88	19,242	5.03
22	SERI	123	378,686	35,149	9.33	18,880	5.00
23	SHAHMURAD	128	630,778	61,520	9.73	31,295	4.95
24	SINDABADGAR	123	317,254	31,985	10.08		5.00
	NON-MEMBERS					,	
25	AL-ASIF	127	258,254	24,896	9.64	12,881	4.99
TC	TAL :- 1999-2000		10,856,757		9.18	534,003	4.92
TC	OTAL :- 1998-1999		15,095,412	THE PERSON NAMED IN COLUMN 2 I	8.96	760,533	5.04

TABLE 6 (4)

MILL WISE BEET SLICING, SUGAR PRODUCTION, RECOVERY AND MOLASSES PRODUCTION FOR SEASON 1999-2000

N.W.F.P		NO OF			REC	MOL.	REC
		DAYS	BEET SLICED	PRODUCTION	%	PRODUCTION	%
1	FRONTIER	31	38,256	3,342	8.74	1,500	3.92
2	KHAZANA	31	55,123	4,580	8.31	2,330	4.23
3	PREMIER	33	94,098	6,696	7.30	3,920	4.21
TO	ΓAL :- 1999-2000		187,478	14,618	7.80	7,750	<u>4.13</u>
TO	TAL :- 1998-1999		126,123	10,831	8.59	5,069	4.02

TABLE 6(5)

PROVINCE WISE TOTAL PRODUCTION OF PAKISTAN SUMMARY 1999-2000

	CANE CRUSHED	BEET SLICED	SUGAR	MOLASSES
PUNJAB	16,829,610		1,315,637	800,536
SINDH	10,856,757		996,317	534,003
N.W.F.P	1,296,344		102,792	62,838
N.W.F.P BE	ET	187,478	14,618	7,750
TOTAL1999	9-2000 28,982,71	0 187,477	2,414,746	1,405,128
TOTAL1998	8-99 42,994,91	1 126,123	3,541,763	2,118,664

TABLE 7(1) ESTIMATED GUR EQUIVALENT PRODUCTION FROM SUGARCANE NOT MILLED AFTER 15% DEDUCTION FOR SEED, FODDER AND WASTAGE ETC.

YEAR	GUR EQUIVALENT	
1985-86	1,119,300	Tonnes
1986-87	1,100,500	Tonnes
1987-88	766,900	Tonnes
1988-89	959,400	Tonnes
1989-90	954,400	Tonnes
1990-91	853,800	Tonnes
1991-92	600,100	Tonnes
1992-93	688,000	Tonnes
1993-94	653,400	Tonnes
1994-95	827,100	Tonnes
1995-96	875,000	Tonnes
1996-97	709,400	Tonnes
1997-98	346,485	Tonnes
1998-99	332,990	Tonnes
1999-00	884,000	Tonnes

Note:

Gur equivalent is based on 8.5% recovery.

These are not Gur production figures.

PSMA is not in agreement with the cane production 1999-2000,

and the balance of 10.40 million tonnes of sugarcane diverted to gur production

(Recovery rate of Gur is 13.5-14.5%)

TABLE 7(2) SWEETENER CONSUMPTION IN PAKISTAN SUGAR + GUR EQUIVALENT

,						
Sugar Coos		PTION IN MI	LLION	TONNES		Sugar Av. Retail Price
Sugar Season Year	Refined Sugar	Gur Equivalent	Total	Per capita		, 2
1993-94 1994-95 1995-96 1996-97 1997-98 1998-99	2.759 2.735 2.605 2.764 3.108	0.653 0.827 0.875 0.709 0.346	3.412 3.562 3.480 3.473 3.454	28.57 29.10 27.75 27.04 26.26	119.4 122.4 125.4 128.4 131.5	13/62 14/36 17/86 21/46 18/75
1999-00	3.077 3.236	0.333 0.884 *	3.410 4.120	25.35 29.64	134.5 139.0	19/63 22/85

TABLE 8

SUGARCANE PLANTATION AREA, PRODUCTION, YIELD AND UTILIZATION OF SUGARCANE BY SUGAR MILLS

PAKISTAN

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1987-88 1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99	841,000 876,900 854,300 883,800 879,800 884,600 962,800 1,009,000 963,100 964,500 1,056,200 1,155,100	33,028,800 36,975,700 35,493,600 35,988,700 34,204,000 38,058,900 44,427,000 47,168,400 45,229,700 41,998,400 53,104,200 55,191,100	39.25 42.17 41.55 40.72 38.90 43.02 46.14 46.75 47.00 43.54 50.28 47.78	61.47 58.71 57.76 62.80 72.49 71.66 76.93 72.49 62.24 65.13 77.32 77.90
1999-00	1,009,800	46,332,600	45.90	62.55

PUNJAB

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1987-88	535,300	19,406,200	36.25	49.20
1988-89	529,600	19,493,700	36.81	42.57
1989-90	501,100	18,682,900	37.29	48.98
1990-91	525,600	19,633,400	37.35	61.60
1991-92	516,900	18,580,800	35.95	63.21
1992-93	536,100	20,044,800	37.39	67.02
1993-94	596,200	24,510,000	41.11	81.87
1994-95	656,700	28,268,000	43.00	74.20
1995-96	605,600	26,880,000	44.40	63.22
1996-97	604,200	24,010,200	39.74	67.86
1997-98	685,300	32,110,600	46.86	80.67
1998-99	780,300	33,382,800	* 42.78	78.12
1999-00	672,100	27,081,300	40.30	62.14

SINDH

YEAR -	AREA	PRODUCTION	YIELD PER	UTILIZATION %
	HECTARES	TONNES	HECTARE	BY SUGAR MILLS
1987-88 1988-89 1989-90 1990-91 1991-92 1992-93 1993-94, 1994-95 1995-96 1996-97 1997-98 1998-99 1999-00	207,100 247,900 250,700 253,099 255,280 248,000 265,800 249,700 254,400 251,200 261,600 270,800 230,600	9,574,800 13,110,500 12,360,000 12,511,135 14,240,476 13,556,800 15,420,000 14,310,300 13,737,200 13,110,600 15,990,600 17,050,700 14,290,800	46.23 52.89 49.30 49.43 55.78 54.66 58.01 57.30 54.00 52.19 61.16 62.96 62.00	98.12 97.54 84.61 76.71 83.00 93.85 84.51 84.12 75.28 78.68 86.58

N.W.F.P

YEAR	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1987-88 1988-89 1989-90 1990-91 1991-92 1992-93 1993-94, 1994-95 1995-96 1996-97 1997-98 1998-99 1999-00	98,700 98,900 102,100 104,600 107,000 99,900 100,300 102,100 102,500 108,400 108,600 103,300 106,300	4,020,500 4,349,000 4,427,300 4,516,100 4,563,200 4,428,400 4,470,000 4,562,200 4,583,000 4,841,600 4,956,500 4,719,500 4,917,100	40.73 43.97 43.36 43.17 42.64 44.33 44.57 44.70 44.70 44.66 45.64 45.68 46.30	33.87 38.26 20.16 20.18 23.97 25.25 24.25 25.86 17.84 15.38 26.30 38.53 26.36

BALOCHISTAN

YEARS	AREA HECTARES	PRODUCTION TONNES	YIELD PER HECTARE	UTILIZATION % BY SUGAR MILLS
1987-88	500	27,300	54.60	
1988-88	500	22,500	45.00	= .*
1989-90	500	23,400	46.80	- "."
1990-91	500	23,600	47.20	·
1991-92	600	26,300	43.83	-
1992-93	600	28,900	48.17	-
1993-94	500	25,000	50.00	-
1994-95	500	27,900	55.80	<u>-</u> , ·
1995-96	600	29,500	49.20	-
1996-97	700	36,000	51.43	÷
1997-98	700	37,500	53.57	, ,
1998-99	700	38,100	54.40	<u>=</u> '
1999-00	800	43,400	54.20	-

SOURCE: Federal Bureau of Statistics.

SUGARCANE PLANTATION AREA (HECTARES) 1987-88 TO 2000-2001

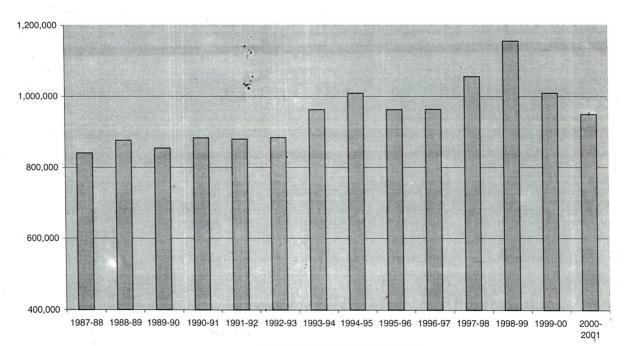


TABLE 9
IMPORT OF SUGAR

		-	
YEAR	QUANTITY	VALUE IN	AVERAGE PRICE
	TONNES	"000" RS.	RS. PER TONNES
1987-88	251,159	958,148	3,815
1988-89	43,380	204,258	4,709
1989-90	210,954	1,920,210	9,103
1990-91	433,320	3,583,000	8,269
1991-92	116,741	914,117	
1992-93	75,156	552,000	7,830
1993-94	47,669	444,105	7,345
1994-95	5,188	•	9,316
1995-96	,	68,761	13,254
1996-97	3,214	50,239	15,631
	681,083	9,861,825	14,480
1997-98	110,990	1,685,859	15,189
1998-99	10,097	152,591	15,113
1999-00	66,627	769,179	11,545
			.,, .,

TABLE 10

EXPORT OF SUGAR

YEAR	QUANTITY TONNES	VALUE IN RS. "000"	AVERAGE PRICE RS.PER TONNE.
1993-94 1994-95 1995-96 1996-97	121,565 315,886 29,134	1,204,964 3,770,558 350,066	9,912 11,936 12,016
1997-98 1998-99 1999-00	210,632 906,602	2,897,750 11,549,170	13,757 12,739

DATA IN TABLE 9 AND 10 ARE SHOWN FOR FISCAL YEAR

Source Federal Bureau of Statistics."

TABLE 11
EXPORT OF MOLASSES

YEAR	QUANTITY TONNES	VALUE IN RS. "000"	AVERAGE PRICE RS. PER TONNE.
1987-88	798,523	687,584	861.07
1988-89	753,239	576,727	765.66
1989-90	1,166,012	1,046,452	897.46
1990-91	776,071	823,636	1,061.29
1991-92	947,000	1,351,762	1,427.41
1992-93	892,618	1,396,111	1,564.06
1993-94	703,450	993,627	1,412.50
1994-95	769,636	1,213,545	1,576.78
1995-96	806,399	1,852,514	2,297.26
1996-97	1,056,134	2,021,755	1,914.30
1997-98	1,359,328	2,542,504	1,870.41
1998-99	1,688,505	1,802,899	1,067.75
1999-00	1,748,000	2,200,000	1,258.58
			and the second s

SOURCE: FEDERAL BUREAU OF STATISTICS. DATA IN TABLE 11 IS FOR FISCAL YEAR.

TABLE 12

EXPORT OF FERMENTATION ETHYL ALCOHOL (NOT DENATURED)

YEAR	QUANTITY LTRS.	VALUE RS."000"	VALUE IN "000" RS. AVERAGE PRICE PER LTR.
1984-85	2,100,000	8,862	04.22
1985-86	3,970,000	17,485	04.40
1986-87		-	-
1987-88	2,100,000	11,140	05.30
1988-89	4,130,971	25,931	06.27
1989-90	8,250,000	60,133	07.29
1990-91	8,229,448	61,090	07.42
1991-92	7,636,000	55,332	07.25
1992-93	8,660,900	90,213	10.42
1993-94	13,206,697	125,866	09.54
1994-95	6,050,200	68,137	11.26
1995-96	1,166,000	16,856	14.19
1996-97	1,232,145	18,273	14.83
1997-98	4,107,000	69,646	16.96
1998-99	6,722,000	115,788	17.22
1999-00	7,608,000	136,364	17.92
	, ,	- / · ·	

SOURCE: FEDERAL BUREAU OF STATISTICS DATA IS FOR FISCAL YEAR.

PAKISTAN SUGAR MILLS ASSOCIATION ZONE WISE LIST OF SUGAR MILLS LOCATION AND DISTRICT

PUNJAB ZONE

1.	NAME OF MILLS	LOCATION CHISTIAN	DISTRICT BAHAWALNAGAR
2.	ASHRAF	ASHRAFABAD	BAHAWALPUR
3.	BABA-FARID	OKARA	OKARA
4.	BROTHERS	CHUNIAN	KASUR FAISALABAD
5.	CHANAR	TANDLIANWALA GOJRA	TOBA TEK SINGH
6. 7.	CHAUDHARY	SILLANWALI	SARGODHA
7. 8.	BROTHERS CHANAR CHAUDHARY CHISTIA CRESCENT FATIMA	NISHTABAD	FAISALABAD
8. 9.	FATIMA	KOT ADD	KOT ADDU
9. 10.	FALLI	SANGLA HILL	SHEIKHUPURA
11.	FECTO	DARYA KHAN	BHAKKHAR
12.	C SAMINDEL	SAMUNDRI	FAISALABAD
13.	FAUJI FECTO G. SAMUNDRI HAMZA	JETHA BHUTTA	RAHIMYAR KHAN
14.	HAMZA HASEEB WAQAS	NANKANA SAHIB	SHEIKHUPURA
15.	HUSEIN	JARANWALA	FAISALABAD
16.	ITTEFAQ		PAKPATTAN
17.	JDW	MOUZA SHIRIN	RAHIMYAR KHAN
18.	KAMALIA	KAMALIA	TOBA TEK SINGH
19.	KASHMIR	SHORKOT	JHANG
20.	KOHINOOR	JAUHARABAD	KHUSHAB
21.	LAYYAH MADINA NATIONAL NOON PAHRIANWALI	LAYYAH	LAYYAH
22.	MADINA	MADINA CHOWK	HAFIZABAD
23.	NATIONAL	BHALWAL.	SARGODHA
24.	NOON	BHALWAL	SARGODHA
25.	PAHRIANWALI	LALIAN PASRUR PATTOKI	JHANG
26.	PASRUR	PASRUR	SIALKOT
27.	PATTOKI		KASUR
28.	PHALIA	FUALIA	MANDI BAHAUDDIN
29.	PUNJAB	MIAN CHANNU	KHANEWAL
30.	RAMZAN	CHINIOT	JHANG
31.	SHAHTAJ	MANDI BAHAUDDIN	MANDI BAHAUDDIN
32.	SHAKARGANJ	JHANG KOT ADU	JHANG
33.	SHEIKHOO	KOT ADU	MUZAFARGARH
34.	TANDLIANWALA	KANJWANI	FAISALABAD
35.	UNITED	SADIQABAD	RAHIMYAR KHAN
36.	ABDULLAH	DEPALPUR	OKARA
37.	INDUS	KOT BAHADUR	RAJAN PUR
38.	QAND GHAR	SHAHKOT	FAISALABAD
39.	YOUSAF	SHAHPUR	SARGODHA

SINDH ZONE

		SINDII ZONE	
40. 41. 42. 43. 44. 45. 46. 47. 48. 49. 50. 51. 52. 53. 54. 55. 60. 61. 62. 63. 64. 65. 66. 67. 68. 69. 70.	AL-ABBAS AL-NOOR ANSARI ARMY WELFARE BAWANY DEWAN DIGRI FARAN FAUJI-KHO FAUJI-TMK HABIB KHAIRPUR LARR MATIARI MEHRAN MIRPURKHAS MIRZA PANGRIO RANIPUR SAKRAND SANGHAR SERI SHAHMURAD SINDHABAD GAR AL-ASIF BACHANI DADU KIRAN LARKANA THARPARKAR THATTA	MIRWAH GORCHANI TALUKA MORO TANDO M. KHAN BADIN TALHAR BUDHO TALPUR DIGRI TENDO M. KHAN KHOSKI TANDO M KHAN NAWAB SHAH KHAIRPUR SAJAWAL MATIARI TANDO ALLAH YAR MIRPURKHAS LOWARI SHARIFF DEH RAJAURI-2 RANIPUR SAKRAND SINDHRI SERI JHOK SHARIF DEEN PUR GHARO TANDO ALLAHYAR PIAROGOTH ROHRI NAUDERO THARPARKAR DEH BIJORO N.W.F.P ZONE	MIRPURKHAS NAWABSHAH HYDERABAD BADIN THATTA MIRPURKHAS HYDERABAD BADIN HYDERABAD NAWABSHAH KHAIRPUR THATTA HYDERABAD MIRPURKHAS BADIN BADIN KHAIRPUR THATTA HYDERABAD MIRPURKHAS BADIN KHAIRPUR NAWAB SHAH SANGHAR HYDERABAD THATTA
71	DANINILI		

71.	BANNU	SERAI NAURANG	BANNU
72.	CHASHMA	D.I.KHAN	D.I.KHAN
73.	FRONTIER	TAKHT.I.BHAI	MARDAN
74.	KHAZANA	PESHAWAR	PESHAWAR
75.	PREMIER	MARDAN	MARDAN
76.	SALEEM	CHARSADDA	CHARSADDA

AZAD KASHMIR

77. MIAN MOHAMMAD	MIRPUR	AZAD KASHMIR
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SUGAR AND SUGARCANE				
	1994-95	1995-96	1996-97	1997-98
Sugarcane Area HA.	1,009,000	963,100	964,500	1,056,200
Sugarcane produced	47,168,400	45,229,700	41,998,400	53,104,200
Yield / Ha-Tonnes	46.75	47	43.54	50.28
Cane Utilized by Mills	34,193,290	28,151,434	27,352,918	41,062,268
% age of utilization	75.49	62.24	65.13	77.32
Sugar Production	2,983,101	2,449,598	2,378,751	3,548,953
Recovery %age	8.72	8.7	8.69	8.64
No. of Mills	66	66	68	71
Cane support. Price Punjab, NWFP / Sindh	20.5/ 20.75	21.5/ 21.75	24.25/ 24.5	35 / 36
Season's Av. Domestic retail price Rs. / Kg	14.36	17.86	21.46	18.75
Av. Inter. export price US\$ / Tonnes	396.12	379.24	319.21	296.85
Total Sale up to 30 th Sep.	2 ,736,784	2,366,481	1,980,072	3,042,165
Beginning Stocks 1st Oct.	309,309	264,659	103,553	413,290
Imports	5,188	3,214	681,083	110,990
Cane + Beet Production	3,001,472	2,470,034	2,393,362	3,555,228
Total Available	3,315,969	2,737,907	3,177,998	4,079,508
Export	315,886	29,134	-	457,471
Consumption	2,735,395	2,605,220	2,764,708	3,108,975
End Stocks	264,689	103,553	413,290	513,062

- Sugar Season 1st Oct. to 30th Sept. Exports and other data are to 30th Sept.
- Av. International price (Source LIFFE LONDON)
- Av. Domestic retail price Rs. / Kg (Source MINFAL.
- Sugarcane production & Utilization figures for 1999-2000 are controversial
- 2000-2001 Estimated

1998-99	1999-2000	Est. 2000-2001
1,166,000	1,009,800	950,000
55,191,100	46,332,600 *	45,000,000
47.77	45.88	47.40
42,994,911	28,982,711	32,000,000
77.90	62.55	73.30
3,530,931	2,414,746	2,670,000
8.21	8.33	8.35
73	69	
35 / 36	35/36	35/36
19.63	22.85	
231.47	211.68	
3,170,374	2,402,090	
513,062	371,389	27,274
10,097	462,439	
3,541,763	2,429,364	
4,064,922	3,263,192	
616,095	NIL	
3,077,438	3,235,918	
371,389	27,274	