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Report Highlights:

Production for Jamaica sugar is projected to fall to 33,000 metric tons (MT) for marketing year (MY) October 2025 to September 2026, consistent with the ongoing downward trend observed in the industry. Labor shortages, elevated production costs and antiquated equipment remain the main limiting factors affecting production in the country. Despite the sliding production forecast, Jamaica plans to continue exporting raw sugar to the United States under the World Trade Organization (WTO) tariff-rate quota program, while also meeting both domestic and regional demand, especially in markets where prices are favorable.

Production

Table 1: Production, Supply, and Distribution

Sugar Cane for Centrifugal	2023/2024		2024/2025		2025/2026	
Market Year Begins	Dec 2023		Dec 2024		Dec 2025	
Jamaica	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	14	0	14	14	0	14
Area Harvested (1000 HA)	6	0	6	6	0	6
Production (1000 MT)	415	0	410	429	0	422
Total Supply (1000 MT)	415	0	410	429	0	422
Utilization for Sugar (1000 MT)	407	0	402	421	0	414
Utilization for Alcohol (1000 MT)	8	0	8	8	0	8
Total Utilization (1000 MT)	415	0	410	429	0	422
(1000 HA), (1000 MT)						

Table 2: Production, Supply, and Distribution

Sugar, Centrifugal	2023/2024		2024/2025		2025/2026	
Market Year Begins	May 2023		May 2024		May 2025	
Jamaica	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	4	4	4	4	0	4
Beet Sugar Production (1000 MT)	0	0	0	0	0	0
Cane Sugar Production (1000 MT)	36	36	34	35	0	33
Total Sugar Production (1000 MT)	36	36	34	35	0	33
Raw Imports (1000 MT)	0	0	0	0	0	0
Refined Imp. (Raw Val) (1000 MT)	60	60	60	60	0	60
Total Imports (1000 MT)	60	60	60	60	0	60
Total Supply (1000 MT)	100	100	98	99	0	97
Raw Exports (1000 MT)	7	7	7	7	0	0
Refined Exp. (Raw Val) (1000 MT)	0	0	0	0	0	7
Total Exports (1000 MT)	7	7	7	7	0	7
Human Dom. Consumption (1000 MT)	89	89	87	88	0	86
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	89	89	87	88	0	86
Ending Stocks (1000 MT)	4	4	4	4	0	4
Total Distribution (1000 MT)	100	100	98	99	0	97
(1000 MT)						

Sugar Production

For MY 2025/2026, sugar production is projected lower at 33,000 metric tons (MT) from 422,000 MT of sugarcane, primarily driven by high production costs, labor challenges, and outdated equipment. In MY 2024/2025, Jamaica's raw sugar production is estimated at 35,000 MT, produced from approximately 429,000 MT of sugarcane.

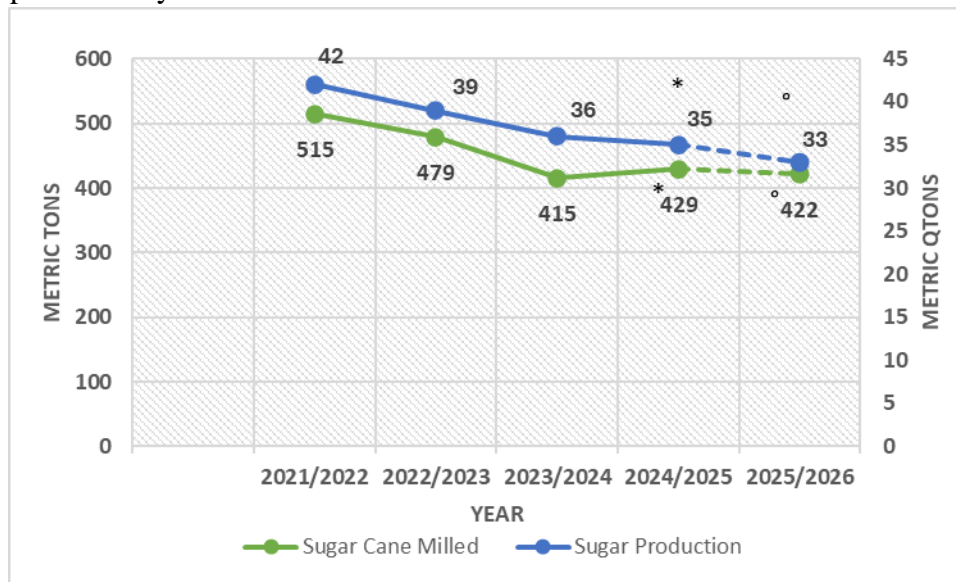
Sugar Cane Production

The planting area is expected to remain flat at 14,000 hectares in MY 2025/2026 given that only two sugar mills are presently operating in the country. Additionally, area harvested is estimated to remain relatively steady from the previous period if challenges, such as availability of labor, input supplies, and factory inefficiencies continue.

For MY 2024/2025, roughly 50 percent of the approximately 14,000 hectares dedicated to sugar cane cultivation is expected to be harvested due to long-standing constraints encumbering the industry.

Recent data from the sugar industry show a sustained underperformance in major production areas for both raw sugar and sugar cane. Figure 1 indicates raw sugar output slid from 42,000 MT in MY 2021/2022 to 35,000 MT in MY 2024/2025. Meanwhile, the volume of sugar cane milled also trended downward compared to the same marketing years. However, a modest rebound is expected in 2024/2025 due to higher harvest expectations and marginal gains in yields.

Figure 1: Quantity of sugar production and sugar cane milled in Jamaica between 2021/2022 and 2024/2025 production years.



Source: Graph constructed using data from Sugar Industry Research figures
 * estimate; °forecast

Due to ongoing challenges in the sugar industry, former sugarcane cultivation areas have now been repurposed for housing and other cash crops, further exacerbating the decline. The government has also redistributed lands, which were previously under sugarcane cultivation for other agricultural undertakings.

Most sugar mills have ceased operations in recent years, leaving only Pan Caribbean and Worthy Park operating in raw sugar production. Jamaica’s reliance on imported refined sugar persists due to current limitations in manufacturing capacity, a situation that is expected to continue into the foreseeable future.

To support the industry, the Government of Jamaica (GoJ) continues to provide transportation subsidies, particularly to small sugarcane farmers, to offset costs associated with transporting sugarcane to factories.

Table 3: Sugarcane production for crop year 2023/2024

Factory	Company	Estate Area Reaped (HA)	Farmer Area Reaped (HA)	Total Area Reaped (HA)	Estate Cane Milled (MT)	Farmer Cane Milled (MT)	Total Cane Milled (MT)	Raw Sugar Produced (MT)
Appleton	Campari	0.00	900.00	900.00	0.00	44,327.53	44,327.53	0.00
Frome	Pan Caribbean	1,852.20	681.17	2,533.37	121,556.21	28,988.14	150,544.35	12,142.71
Worthy Park	Worthy Park (includes Monymusk farmers)	2,095.06	1,468.39	3,563.45	154,720.41	79,683.02	234,403.43	23,493.42
*	Everglades	0.00	27.35	27.35	0.00	0.00	0.00	0.00
GRAND TOTAL		3,947.26	3,076.91	7,024.17	276,276.62	126,464.31	429,275.31	35,636.13

* Farmer-reaped sugarcane is generally transferred to one of the above factories for processing.

Source: Sugar Industry Authority (Preliminary) 2025

Consumption

Local sugar consumption for MY 2025/2026 is forecast to drop to 86,000 MT (26,000 MT of raw sugar and 60,000 MT of refined sugar) compared to MY 2023/2024. On average, per capita consumption of sugar in Jamaica fluctuates, but remains approximately 82 lbs.

The manufacturing sector in Jamaica consumes most of the imported refined sugar. However, in recent years, the Ministry of Health and Wellness, as well as the Heart Foundation of Jamaica, have jointly launched a national campaign warning against excessive sugar intake. In response, some manufacturers have lowered sugar content in their products. Since 2019, the GoJ has proposed a tax on all sugary beverages to discourage consumers from purchasing products with high sugar content. To date, the GoJ is still deliberating legislation to implement this policy, which if enacted, would undoubtedly further curb both raw and refined sugar consumption in Jamaica.

Annually, the spirits' industry uses an estimated 100,000 MT of molasses and 5,000 MT of raw sugar. Though other sweeteners are available locally, their market share remains minimal compared to cane sugar, which continues as the preferred choice among consumers.

Trade

Jamaica has historically exported sugar to the European Union (EU) under the European Union Sugar Protocol (EUSP), which extended benefits to countries in the African, Caribbean, and Pacific (ACP) group. Under the EUSP, Jamaica could ship raw sugar to the EU at a premium price and import raw sugar for domestic consumption at a lower price.

In 2009, the EUSP was replaced by the Economic Partnership Arrangement, which reduced the price difference between the world market price and that of ACP countries. In 2013, the EU revised its Common Agricultural Policy (CAP), known as [EUCAP](#)¹, effectively removing the preferential price enjoyed by ACP countries. This policy change led ACP countries, such as Jamaica, to operate under regular market conditions, characterized by high input costs and low efficiency relative to other global sugar markets.

The changes to the EU policy reshaped Jamaica's raw sugar marketing strategies. Currently, sugar is primarily used for domestic purposes, and exported to the Caribbean, the United States (under pre-determined quotas), and in modest quantities to the EU, even at reduced prices.

Despite the lower production forecast for MY 2025/2026, local industry intends to continue supplying sugar to the United States, though the entire quota may not be filled, as indicated in recent years. In 2024, Jamaica exported 4,500 MT of raw sugar to the United States, out of the 11,834 MT allocated. Sugar produced also satisfied domestic and other export markets, including to the Caribbean Community (CARICOM).

Jamaica expects to continue importing refined sugar since it is not produced locally. Imports are projected to remain relatively stable for the outyear. In 2024, Jamaica mainly imported refined processed sugar from Guatemala, Colombia, and the United Kingdom.

Stocks

Generally, producers maintain stock levels at 4,000 MT of raw sugar due to prohibitive storage costs. Importers also stock a limited amount of refined sugar.

Policy

The Ministry of Agriculture, Fisheries and Mining (MoAFM) oversees Jamaica's sugar industry, governing policies related to land usage, irrigation, subsidies and other matters.

Under MoAFM, the Sugar Industry Authority (SIA) is the regulatory body that exercises oversight in areas of arbitration, research and development and monitoring and evaluation. The SIA also regulates the marketing of sugar and molasses.

¹ <https://www.cepal.org/en/publications/3173-impact-changes-european-union-import-regimes-sugar-banana-and-rice-selected>

Initially, the Jamaica Cane Products Sales (JCPS) Limited served as a private marketing company created in 1994 to issue marketing licenses to factories it represented under the jurisdiction of the SIA, as these factories lacked individual licensing capabilities for their own products. However, subsequent policy changes by the GoJ rendered JCPS obsolete, leading to its closure in 2018, as the SIA began directly issuing licenses to sugar factories.

The Jamaica Country Strategy for the Adaptation of the Sugar Industry (JCS)² is the primary policy guiding the Jamaican sugar industry. The JCS I (2009-2015) was designed in response to the EU’s policy changes that regulated sugar export trade in ACP countries. Following the revisions, prices paid to ACP countries for raw sugar fell by 36 percent.

The *JCS II (2016-2020)*, updated by MoAF in July 2019, outlines three main strategic objectives:

- i. developing and maintaining a sustainable private sector-led sugar cane industry with diversified product offerings;
- ii. strengthening social resilience, economic diversification, and environmental sustainability in Sugar Dependent Areas (SDA);
- iii. maintaining progress towards the GOJ’s macroeconomic goals.

The policy, which is currently in effect, adopts a three-phase approach: transition, transformation, and consolidation. These updates aim to minimize industry risks, while opening avenues to boost revenue streams. MoAFM envisions a comprehensive transformation of the sugarcane value chain, emphasizing the production of products beyond traditional commodities. Value-added prospects include the production and generation of energy products, such as ethanol, refined sugar, as well as the expanded production of premium products, such as rum and other spirits.

Marketing

Pan Caribbean Sugar Company and Worthy Park Estate are the only two sugar marketing agents in Jamaica. These companies have been licensed by the GoJ to market their own products, which allows them the authority to set their own pricing strategies. Refined sugar, which is entirely imported, is distributed to retail markets and various manufacturers of beverages and baked goods by independent companies. The pricing of sugar within Jamaica is set by marketing agents and verified by the SIA. Current local sugar prices are outlined in table 2 below.

Table 4: Price of sugar

Type of Sugar	Prices (US\$/pound)		
	Producer to wholesaler	Wholesaler/Importer to retail	Retail to consumer
Raw	N/A	0.81	1.06
Refined	N/A	1.13	1.50

²<https://jis.gov.jm/cabinet-approves-revised-country-strategy-for-the-sugar-industry/>

Attachments:

No Attachments