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NAMIBIAN AGRONOMIC BOARD

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A globally recognised regulator of a sustainable, agile and innovative agronomy and horticulture sector

MARKET INTELLIGENCE REPORT

SUGAR

ISSUE 3 OF 2025

1. INTRODUCTION

Sugar is predicted to account for 80% of global consumer caloric sweetener intake (OECD/FAO, 2023); hence, it is a very substantial commodity worldwide, and Namibia is no exception, despite its lack of sugar production. Sugar is a sweet substance, especially from crops such as sugar cane and sugar beet (Cambridge Dictionary, n.d). Sugar is white, brown, or dark brown, and it is used as a sweetener in domestic food and as an ingredient in the food industry for sweet-flavoured substances. Hence, it is referred to as sucrose and sometimes glucose and fructose (Tayyab et al., 2023). Sugarbeet fulfils about 25% of the world's sugar requirement, leaving about 75% to sugarcane (Tayyab et al., 2023).

Sugar is projected to remain the most consumed sweetener worldwide, accounting for around 80% of global sweetener utilisation (OECD/FAO, 2022). Despite the anticipated decline in sugar consumption in developed countries due to policies emanating from health concerns that sugar holds, e.g., type 2 diabetes, weight gain, obesity, heart disease, and tooth decay, etc, growth in sugar consumption is still anticipated due to population growth, especially in the low- and middle-income countries (OECD/FAO, 2022). Between 2019 and 2023, Namibia imported an average of 115,000 tons of sugar annually, valued at over N$1.4 billion, whereas local sugar production is nonexistent.

Prepared by the Namibian Agronomic Board (NAB), this market intelligence report narrates the sugar industry statistics and overviews of the sugar market from the perspectives of production, consumption and trade (exports and imports) at global, continental (Africa), regional (Southern Africa) and national (Namibia) levels, excluding other sweeteners such as syrups, artificial sweeteners and honey, and processed levels (granular, refined or powdered). This report will inform potential investors, policymakers, and sugar value chain actors in making data-driven decisions and identifying opportunities in the sugar industry.

Different types of sugar are currently packed in Namibia, imported from other countries, including white, brown, and dark brown sugar. However, the consulted databases, including the International Trade Centre (ITC), FAOSTATS, and the Namibia Statistics Agency (NSA), do not classify sugar by colour nor processed level (granular, refined, or powdered). The ratio of each sugar type within total sugar imports was therefore estimated using sugar packing data collected from key sugar packing companies in Namibia.

2. GLOBAL PERSPECTIVE

PRODUCTION: As presented in **Figure 1**, the production of sugar in the world reached 183.5 million metric tons in 2023/2024, and it is forecasted to reach 189.7 metric tons in 2024/2025 (STATISTA,

2023; CZ, 2025). The forecasted 2024/25 sugar production will be the highest on record (ISO, 2022). Sugar production is, therefore, expected to increase by 9.3% between the 2020/21 and 2024/25 production periods (**Figure 1**). World sugar production is demand-driven, driven by population growth, per capita incomes, sugar prices, substitute sweeteners, and the sugar health debate (ISO, 2022). Despite the predicted global increase in sugar production and demand, non-sugar-producing countries experience supply chain challenges (Tralac, 2017).

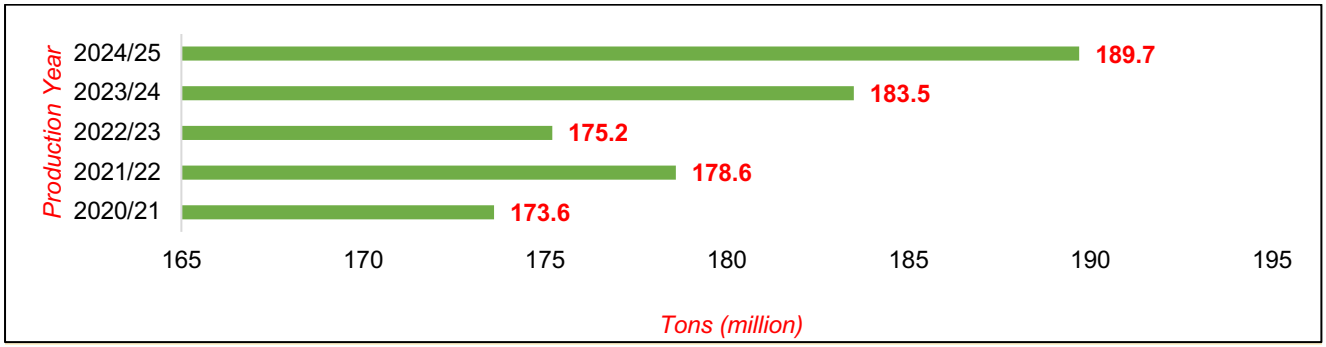
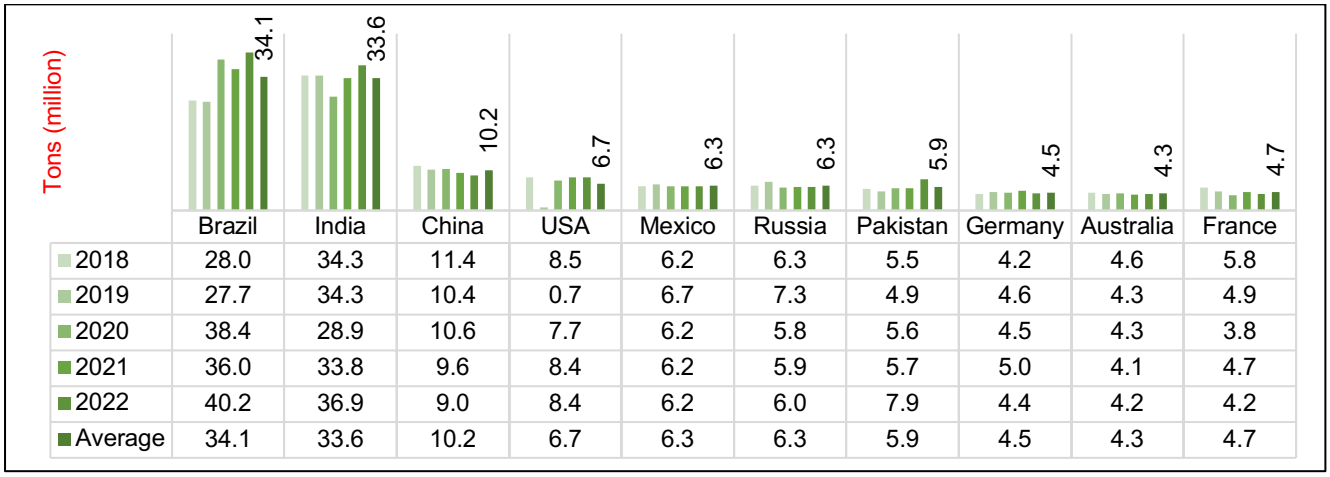


Figure 1: *World sugar production quantities per year* ***Source:*** *CZ (2025)*

According to FAO Statistics, Brazil leads global sugar production, averaging over 34 million tonnes annually, followed by India with more than 33 million tonnes (**Figure 2**). France ranks last among the top ten sugar-producing countries, with an average annual production of 4.7 million tonnes (FAO, 2024).



	Brazil	India	China	USA	Mexico	Russia	Pakistan	Germany	Australia	France
2018	28.0	34.3	11.4	8.5	6.2	6.3	5.5	4.2	4.6	5.8
2019	27.7	34.3	10.4	0.7	6.7	7.3	4.9	4.6	4.3	4.9
2020	38.4	28.9	10.6	7.7	6.2	5.8	5.6	4.5	4.3	3.8
2021	36.0	33.8	9.6	8.4	6.2	5.9	5.7	5.0	4.1	4.7
2022	40.2	36.9	9.0	8.4	6.2	6.0	7.9	4.4	4.2	4.2
Average	34.1	33.6	10.2	6.7	6.3	6.3	5.9	4.5	4.3	4.7

Figure 2: *Top 10 most sugar-producing countries in the World* ***Source:*** *FAO (2024)*

PRICE: During the past four years (2021- 2024), the peak sugar producer price per ton was recorded in 2023 at N$11,262/ton, followed by N$9,746/ton in 2024, and the lowest was N$8,388/ton in 2021 (**Figure 3** below). The lowest prices were recorded in 2021 (N$6,519/ton), 2022 (N$7,517/ton), and 2024 (N$7,883). As shown in Figure 3, the variance between peak price and the lowest producer price fluctuated, ranging from 12% in 2023 to 39%. Unfortunately, the authors did not access any records of retail prices.

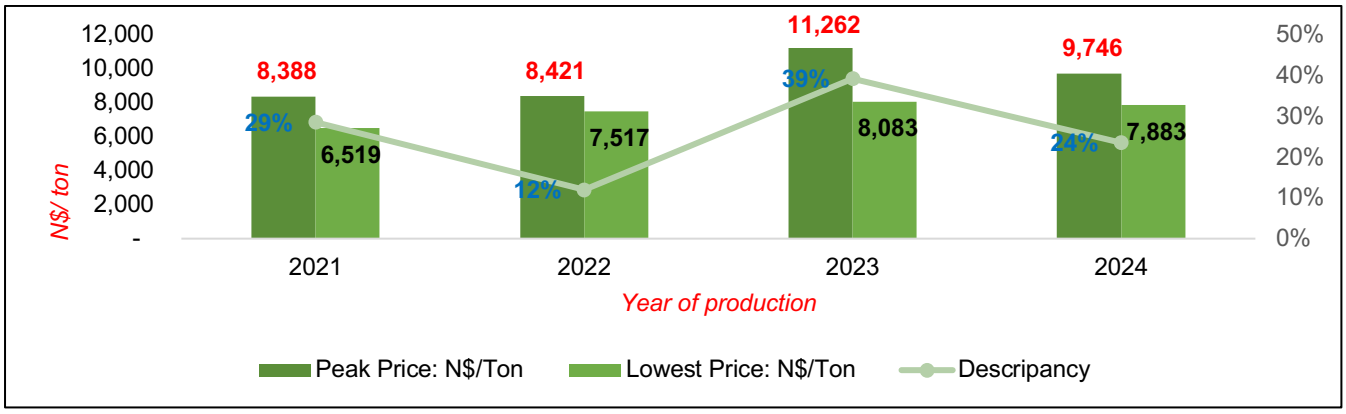


Figure 3: *World sugar producer average price* **Source:** *Ycharts (2024)*

CONSUMPTION*:* Global sugar consumption is forecast to exceed 180 million tons annually by 2024/25, up from 171.9 million tons in 2020/21 (**Figure 4**). Growth in global sugar consumption is attributed to the increasing world population (CZ, 2025). Despite a recommendation by The American Heart Association (AHA) for women adults to not consume sugar over 25 grams per day, and men to not consume over 36 grams of sugar per day, many countries still consume over 100 grams of sugar per capita, e.g. USA, Germany, Netherlands and Ireland consume 126.4g, 102.9g, 102.5g and 96.7g of sugar per capita per day respectively (AHA, 2025; World Population Review, 2024).

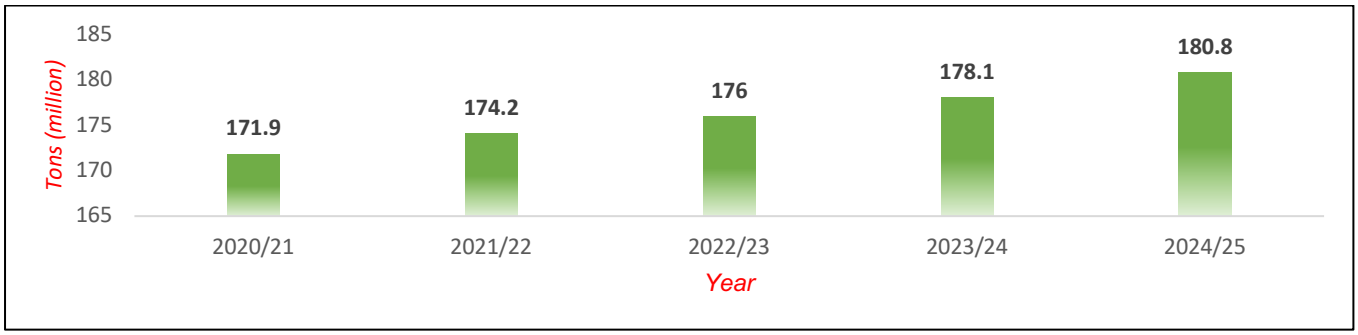


Figure 4: *World Sugar consumption per year* **Source:** *CZ (2025)*

IMPORTS: Figure 5 below shows that sugar worth N$770.4 billion was imported worldwide in 2023, an increase from N$598.14 billion in 2022 (ITC, 2023). The imports of sugar, therefore, increased by 138% in the past five (5) years, i.e., from 2019 to 2023. World sugar consumption growth is generally attributed to the rising world population (CZ, 2025) and rising import prices. For instance, the European Union increased its sugar imports to ensure adequate stock levels through import price adjustments, leading to over 3.6 million tons in 2023, an import growth of nearly 36% from 2022 (Vesper, 2024).

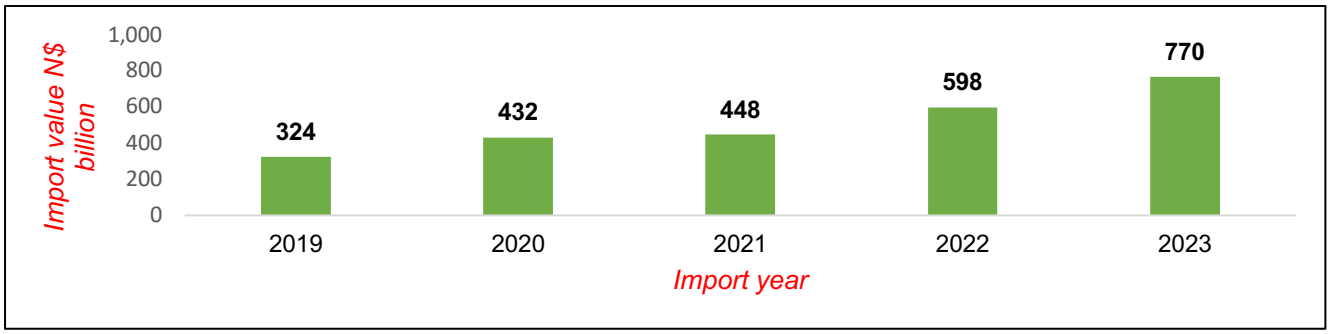


Figure 5: *World sugar import value per year* ***Source:*** *ITC (2023)*

Figure 6 presents the top 10 sugar-importing countries by tonnage and value. Indonesia is the world's largest sugar-importing country, both in terms of average tonnage (5.2 million tons) and average value (N$38 billion) imported. Morocco was the 10th most importing country by average tonnage (1.19), whereas India was the lowest amongst the most sugar-importing countries by average value (N$9 billion) (ITC, 2023).

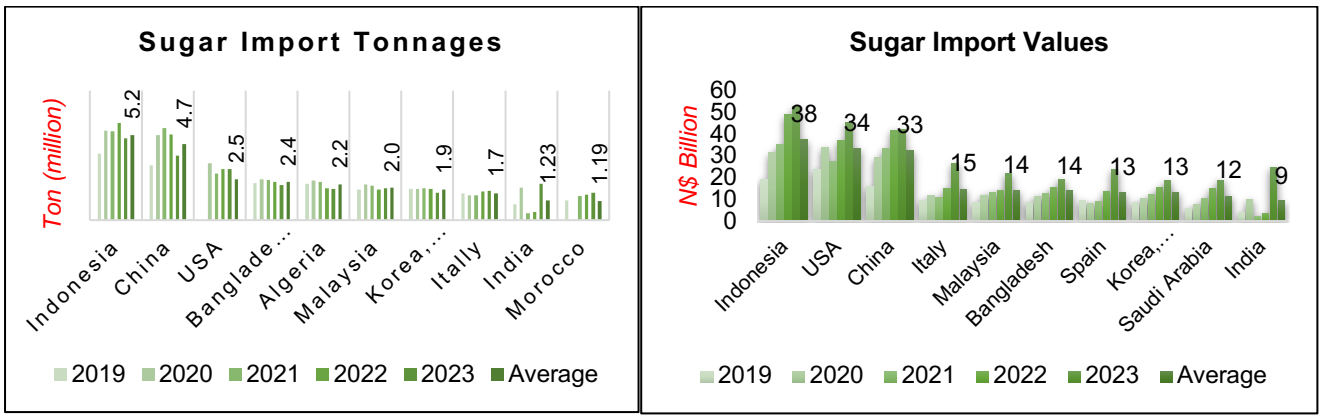


Figure 6: *Top 10 most sugar-importing nations in the world (tonnage and value)* **Source:** *ITC (2023)*

Figure 7 presents the sugar import prices incurred by the 10 largest importing countries. Italy imported sugar at the highest price of N$14,854/ton, followed by the USA at N$14,524, and Algeria being the lowest at N$8,925/ton, amongst the 10 largest importers of sugar in the world.

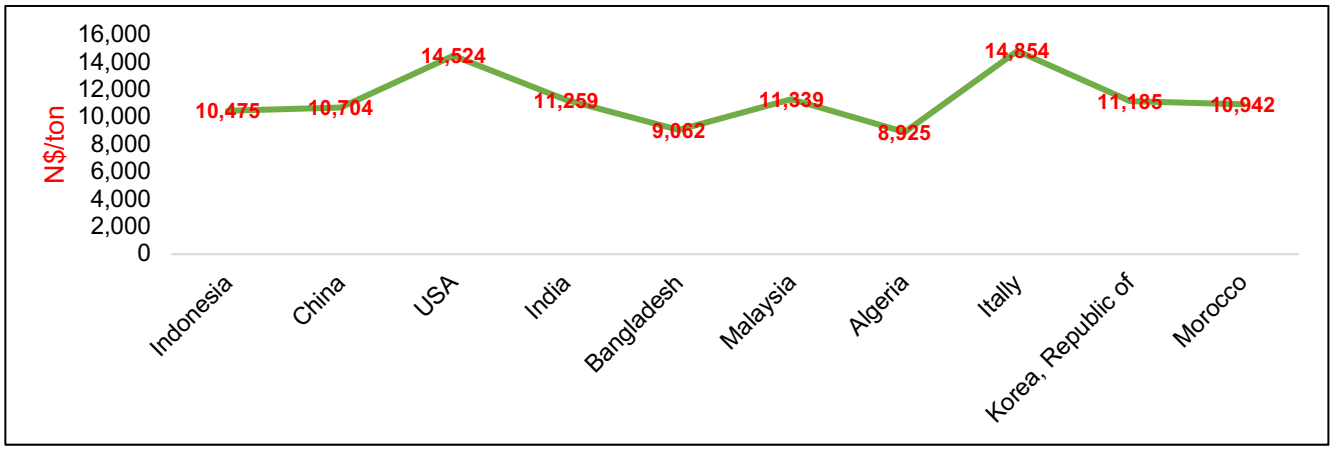


Figure 7: *Sugar price paid by the 10 most sugar-importing countries (2024)* **Source:** *ITC*

EXPORTS: As illustrated in **Figure 8**, the world exported about N$698 billion worth of sugar during the year 2023, which increased from N$295 billion in 2019 (ITC, 2023). Hence, a 137% growth occurred over the five years from 2019 to 2023. In addition to population growth, sugar exports grow alongside income growth in middle- and low-income countries, especially in Asia and Africa (OECD/FAO, 2023).

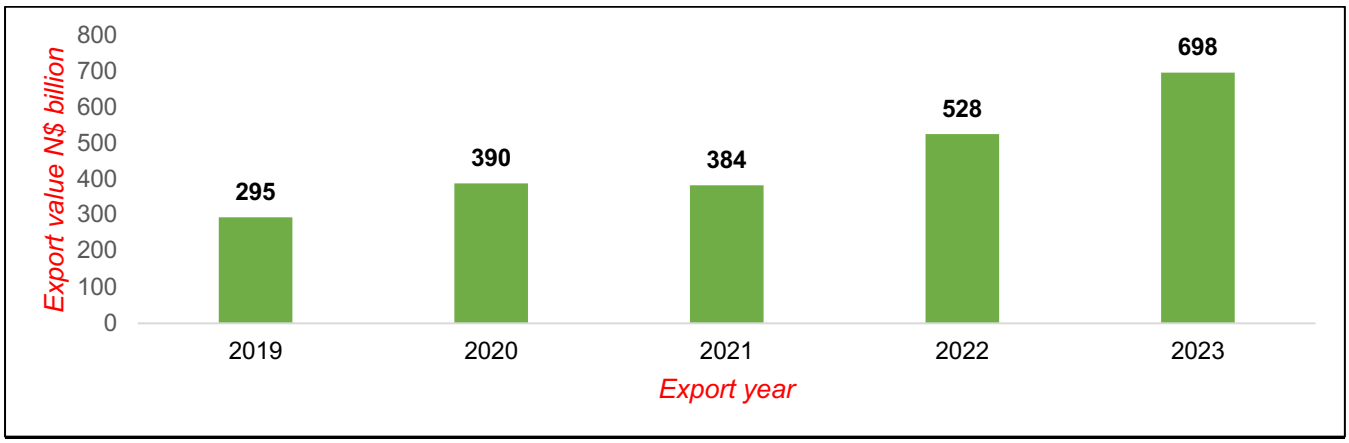


Figure 8: *World sugar export values per year* ***Source:*** *ITC (2024)*

Figure 9 presents the 10 largest sugar-exporting countries by quantity and value between 2019 and 2023. In terms of export quantities, Brazil is the highest (27 million tons), followed by India (8 million tons), and the Netherlands is the lowest (600,000 tons). In terms of sugar export values, Brazil remained the highest (N$165 billion), followed by India (N$56.9 billion), and the least was Poland (N$6 billion).

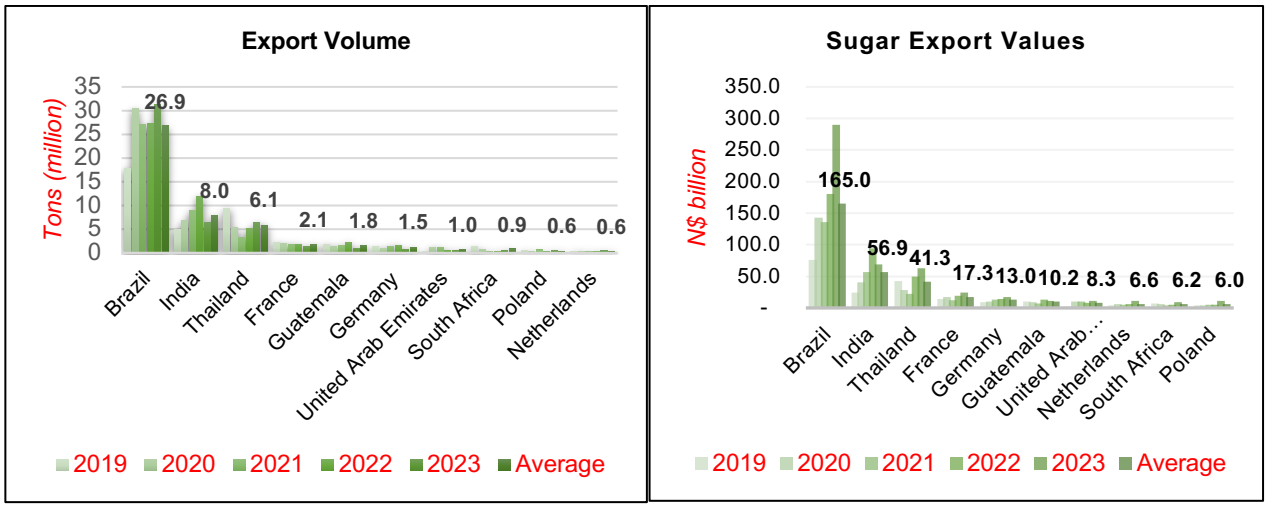


Figure 9: *The world's ten largest export countries by tonnage and value* ***Source:*** *ITC (2023)*

Figure 10 below presents the export prices of sugar from the ten largest exporters by value in 2023. The highest price per ton of sugar exported during 2023 was by the Netherlands at N$17,726/ton, followed by Germany at N$17,330/ton, and the least was Brazil at N$9,280/ton.

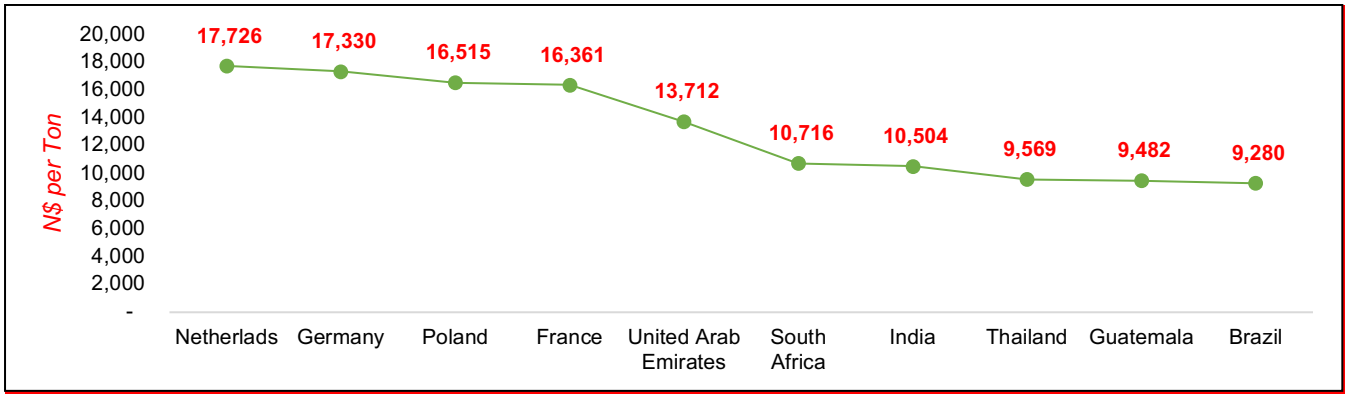


Figure 10: *Sugar price received by the 10 largest exporter countries* ***Source:*** *ITC (2023)*

3. AFRICAN PERSPECTIVE

PRODUCTION*:* Sugar production in Africa averaged at 11.14 million tons per year between 2018 and 2022 (FAO, 2024). A 4% decrease is observed when comparing the highest sugar production of 11.42 million tons in 2018 to 2022 (11.02 million tons). The lowest point in sugar production over five years occurred in 2020, when it fell from 11.30 million tons in 2019 to 10.84 million tons (**Figure 11**). Africa's sugar production trend has therefore been generally on the decline, attributed to drought in Southern Africa, especially in South Africa, which is the second-largest producer in Africa (USDA, 2024).

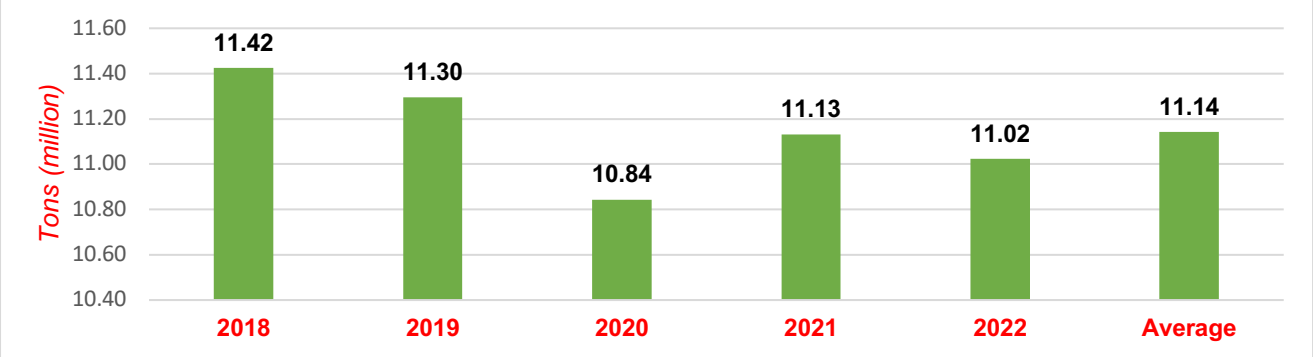


Figure 11: Africa Sugar production per year for 2018 – 2022 ***Source:*** *FAO (2024)*

Figure 12 below presents the ten (10) largest sugar-producing countries in Africa. Egypt is the highest (0.9 million tons), followed by South Africa (0.7 million tons), and Ethiopia is the lowest (0.36 million tons).

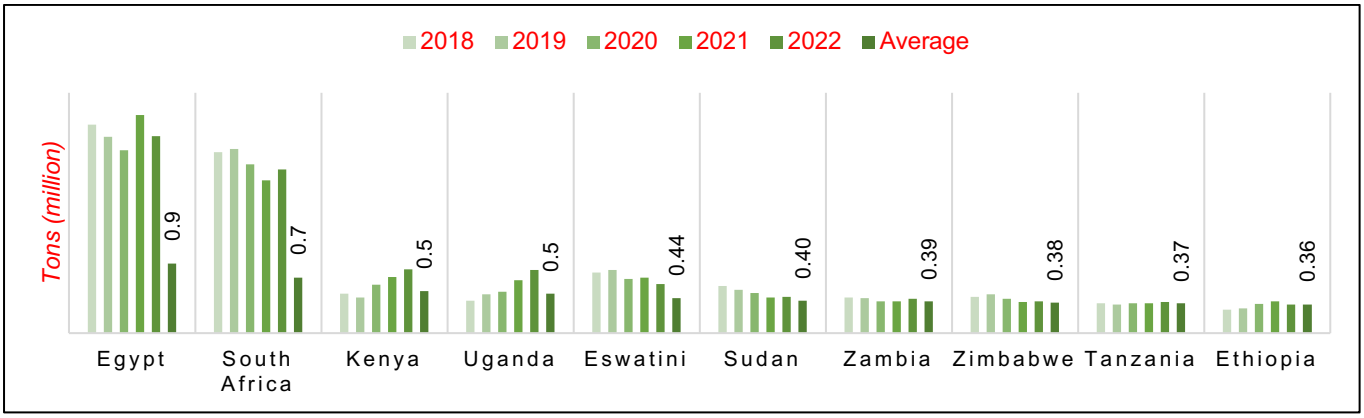


Figure 12: *Ten largest sugar-producing countries in Africa* ***Source:*** *FAO (2024)*

CONSUMPTION: According to **Figure 13** and the World Population Review (2024), sugar consumption averaged 18.2 million tons per year between 2019 and 2022. Fluctuations in sugar consumption are linked to instability in global sugar prices (USDA, 2024), with COVID-19 contributing to a decline in Africa's sugar consumption from 2019 to 2020 (OECD, 2020). The surge in fuel and fertiliser prices has also contributed to higher production costs, leading to higher food prices and ultimately reduced consumption levels in Africa (IFAD, n.d.).

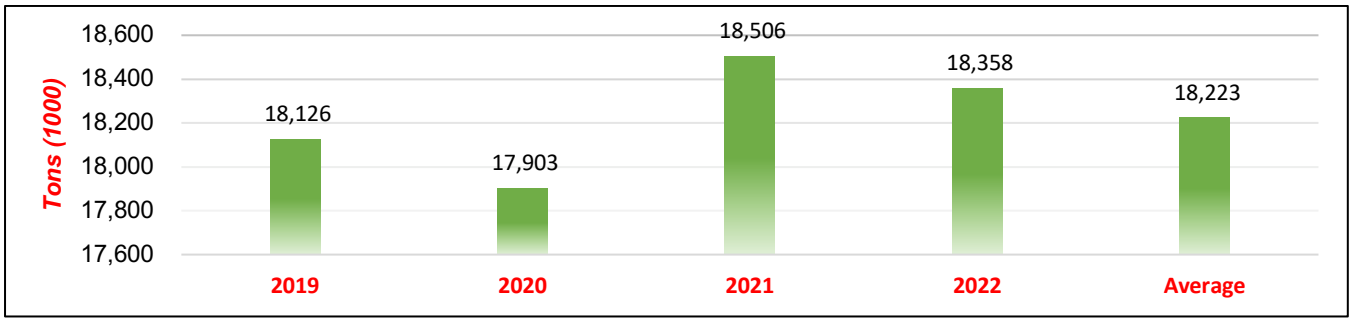


Figure 13: *Sugar consumption in Africa* ***Source:*** *World Population Review (2024)*

Figure 14 presents the 10 most sugar-consuming nations in Africa. Egypt is the highest (2.5 million tons), followed by Nigeria (1.8 million tons), whereas Uganda is the lowest (500,000 tons).

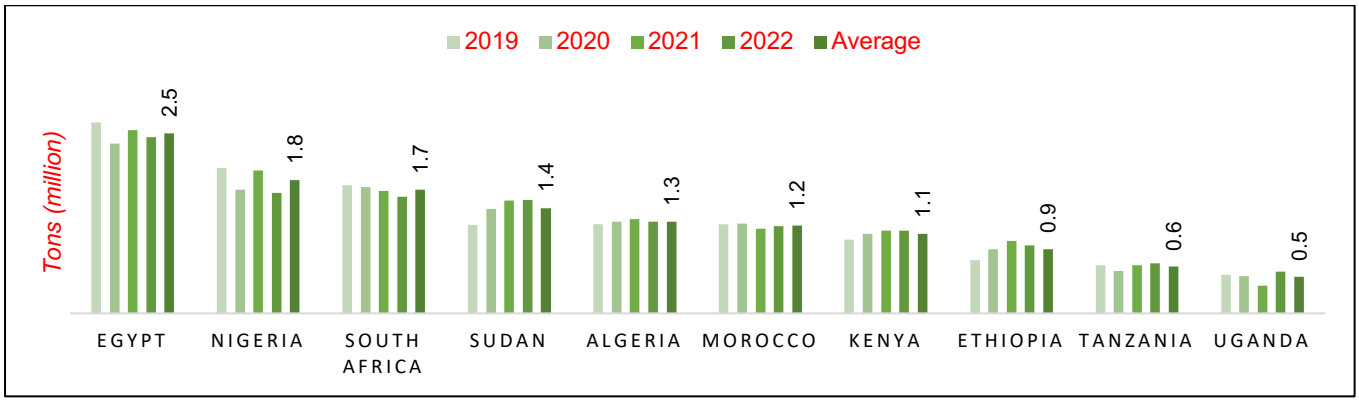


Figure 14: *Ten largest sugar-consuming countries in Africa* **Source:** *World Population Review (2024)*

IMPORTS: Africa imported an average of N$113 billion in sugar annually between 2019 and 2023, reaching a high of N$160 billion in 2023 (ITC, 2023; **Figure 15**). Africa's sugar imports have been on the rise, driven by slight declines in production and consumption in major economies such as Egypt and South Africa, mainly due to weather-related challenges (USDA, 2024).

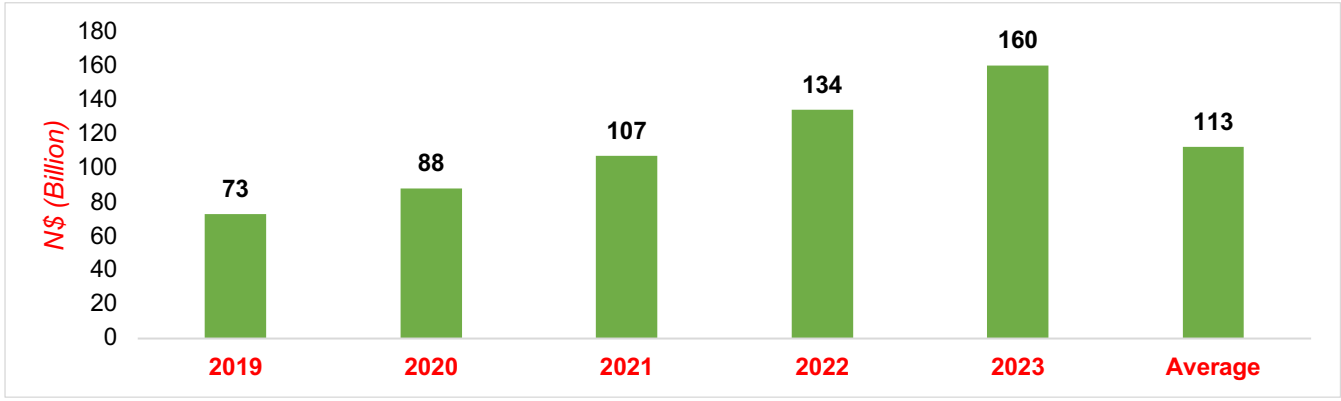


Figure 15**:** *Sugar imports by Africa in aggregate* ***Source:*** *ITC (2024)*

Figure 16 below presents the volumes and values of sugar imported by the ten highest countries in Africa. In terms of average import tons, Sudan is the highest (1.7 million tons), followed by Morocco (1.5 million tons), and Mauritania is the lowest (407 million tons). In terms of average import values, Nigeria is the highest (N$12.7 billion), followed by Algeria (N$1.5 billion), and Mauritania remains the lowest (N$3.3 million).

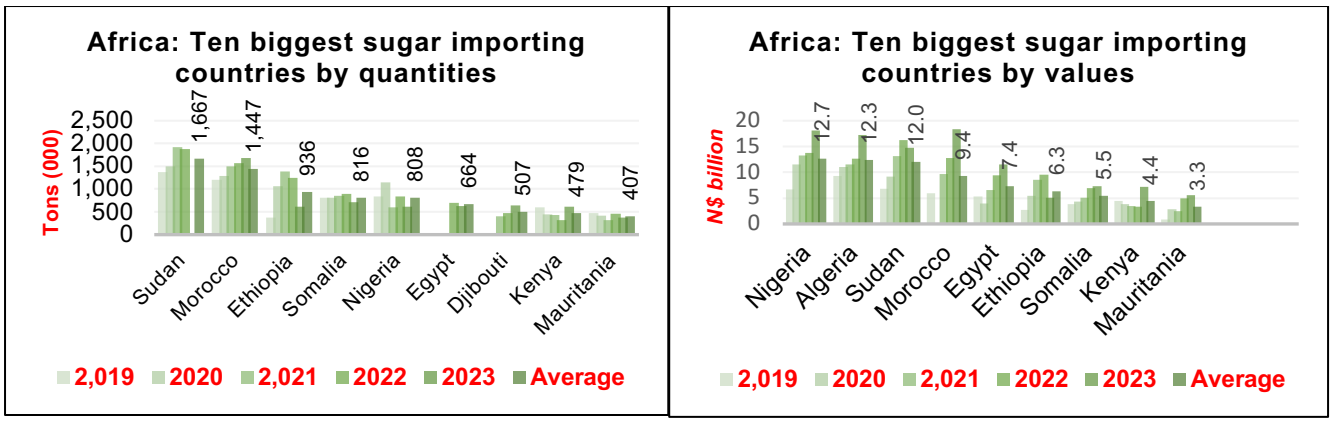


Figure 16: *Top 10 most sugar-importing nations in* Africa *(tonnage and value)* ***Source:*** *ITC (2023)*

Figure 17 below presents the sugar import prices for the 10 largest African importers. Nigeria is the highest (N$29,450/ton), followed by Egypt (N$18,185/ton), whereas Ethiopia is the lowest (N$8,334).

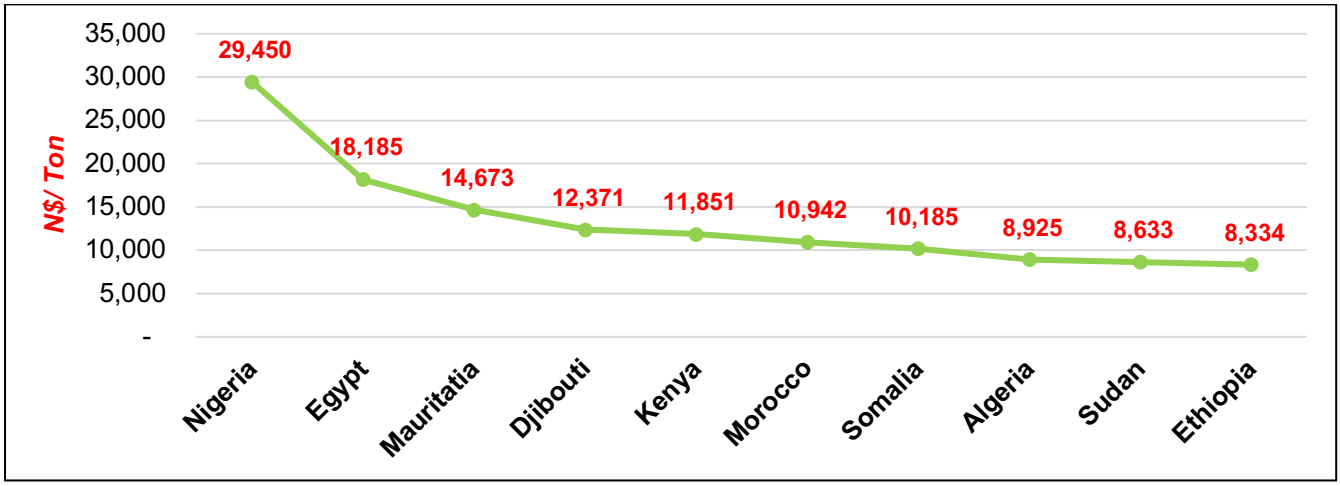


Figure 17: Average sugar price paid by the 10 most sugar-importing countries in Africa
Source: *ITC (2024)*

EXPORTS: Figure 18 shows that Africa as a whole exported sugar worth N$54 billion in 2023, the highest export value in the past five years since 2019. African sugar exports accounted for only 8% of global exports in 2023 (ITC, 2024). The increase in sugar exports is driven by higher sugar prices in some parts of the world, especially in European countries (Vesper, 2024), as well as by income growth in middle- and low-income countries in Africa and Asia (OECD/FAO, 2023).

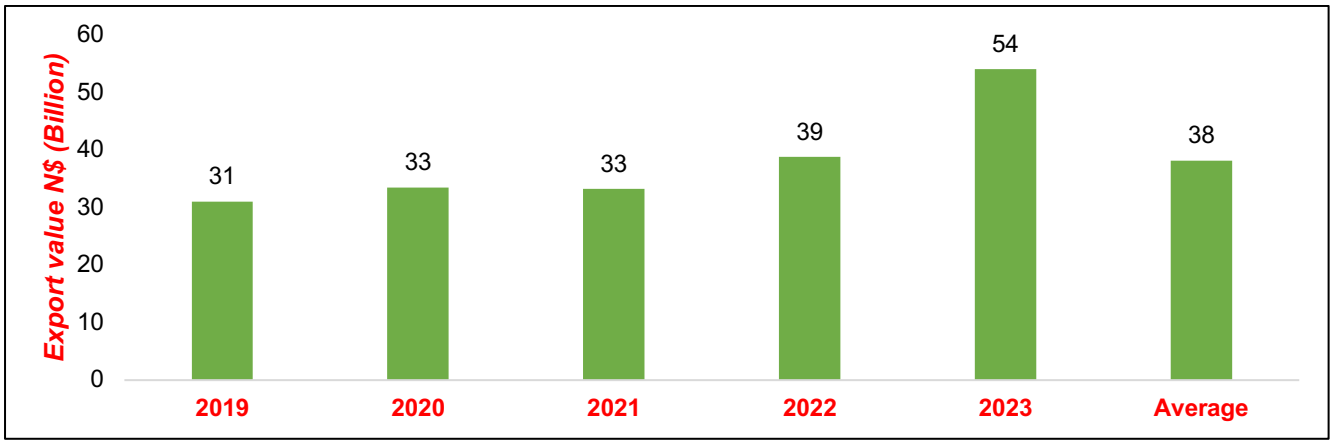


Figure 18: *Aggregate sugar exports by Africa* ***Source:*** *ITC (2024)*

Figure 19 below presents the quantities and values of sugar exported by the ten highest African countries. In terms of average annual quantities, South Africa is the highest (894,000 tons), followed by Eswatini (669,000 tons), and Togo is the lowest (62,000 tons). In terms of average annual values, South Africa remains the highest (N$6.2 billion), followed by Eswatini (N$6.2 billion), while Togo remains the lowest (N$0.1 billion).

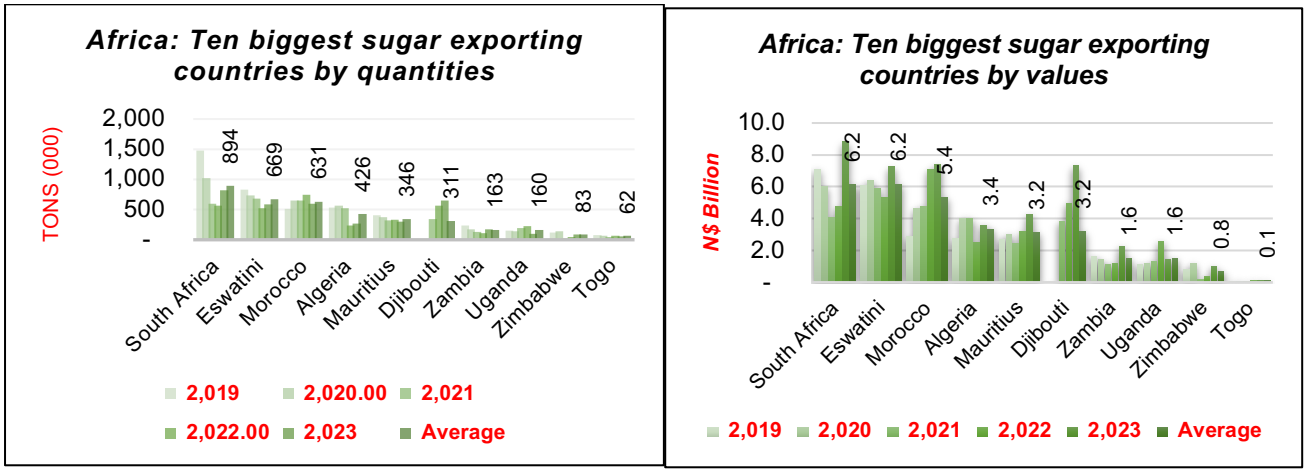


Figure 19: *Top 10 most sugar-exporting nations in Africa (tonnage and value)* ***Source:*** *ITC (2023)*

Figure 20 presents the unit values of sugar exported by the ten highest African countries. Uganda had the highest price (N$15,390/ton), followed by Mauritius (N$14,347), whereas Togo had the lowest price (N$2,633/ton).

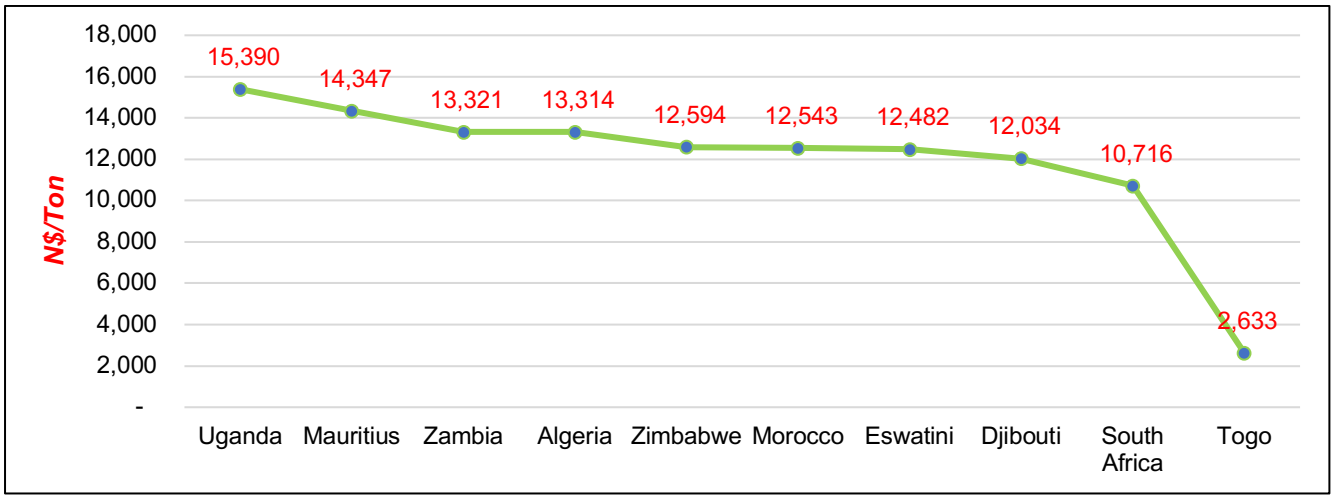


Figure 20: *Price per ton of sugar exported by the ten highest exporting countries* ***Source:*** *ITC (2024)*

4. SOUTHERN AFRICA PERSPECTIVE

PRODUCTION*:* Figure 21 presents trends in sugar production in the Southern Africa Development Community (SADC). Over the past five years, sugar production in SADC reached the highest quantity of 3.08 million tons in 2019 and the lowest in 2021 (2.6 million tons), before increasing to 2.66 million tons in 2022. On average, sugar production in SADC has been declining due to challenges such as drought, regulatory reforms, and global market shifts (FAO, 2024).

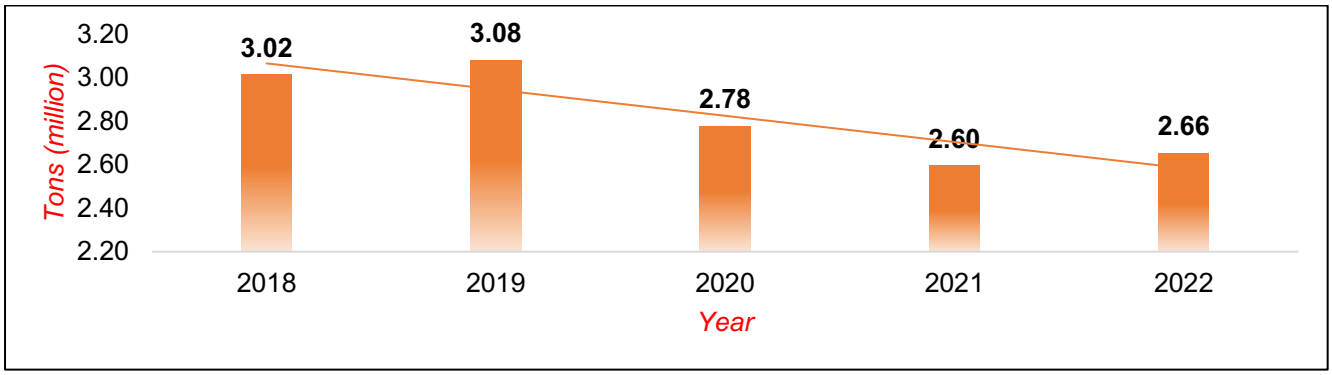


Figure 21: *Sugar production per year in Southern Africa* ***Source:*** *FAO (2024)*

Table 1 shows the descending order of the Top 10 largest sugar-producing countries in Southern Africa from 2018 to 2022. On average, South Africa was the highest sugar-producing country with an average production of 2,121,000 tons/annum, followed by Eswatini with 705,000 tons/annum, and the least being Madagascar with 86,000 tons/annum (**Table 1**).

Table 1: *Top 10 largest sugar-producing countries in Southern Africa ('000 tons)*

Country	2018	2019	2020	2021	2022	Average ('000 tons)
South Africa	2,258	2,295	2,106	1,906	2,042	***2,121***
Eswatini	760	788	673	690	615	***705***
Zambia	448	436	398	397	430	***422***
Zimbabwe	453	483	427	391	397	***430***
Tanzania	371	360	370	375	385	***372***
Mozambique	346	314	305	271	287	***305***
Malawi	250	252	270	276	247	***259***
Mauritius	323	331	271	256	233	***283***
Angola	75	100	115	118	118	***105***
Madagascar	90	83	81	90	85	***86***

Source: FAO (2024)

CONSUMPTION: As shown in Figure 22, sugar consumption in the SADC remained nearly constant from 2019 to 2021, at around 4,4 million tons/annum, but declined by 2% (4.3 million tons) from 2021 to 2022 (World Population Review, 2024). On average, the SADC consumed 4,342,000 tons of sugar between 2019 and 2022 (figure 22). A rise in sugar prices is attributed to a decrease in sugar consumption in the SADC (IFAD, n.d.).

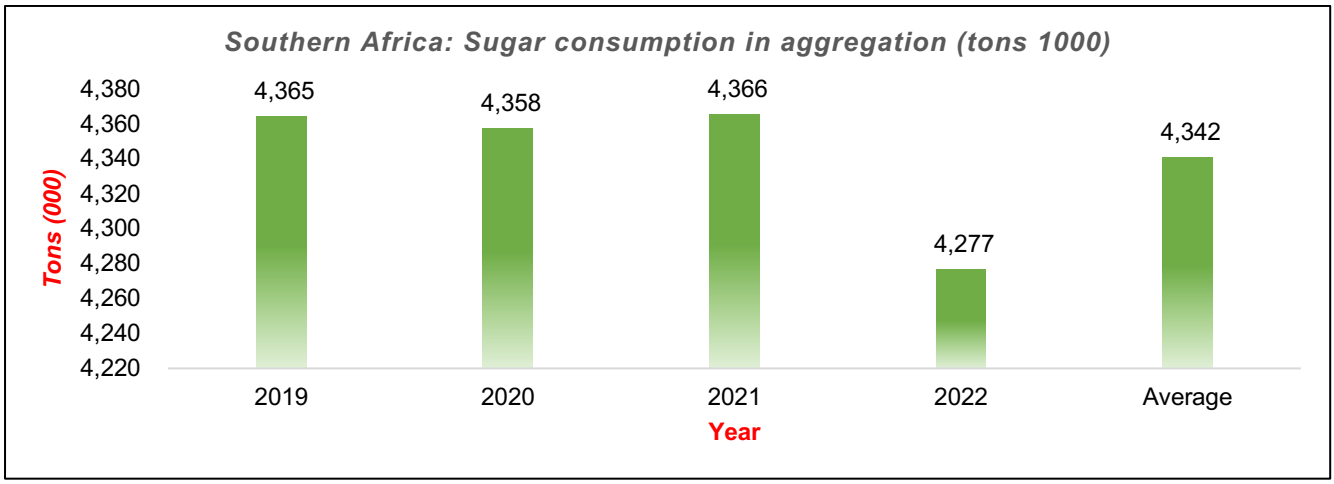


Figure 22: Aggregate sugar consumption by SADC **Source:** *World Population Review (2024)*

IMPORTS: As depicted in **Figure 23**, the SADC experienced the highest sugar import volumes in 2019 (1.64 million tons), followed by 1.59 million tons in 2021, and the lowest was 1.47 million tons in 2020. For import values, the highest was recorded in 2023 (N$18.9 billion), the second-highest in 2022 (N$16.8 billion), and the lowest in 2020 (N$12.2 billion). On average, the SADC imported 1.56 million tons per annum, valued at N$14.66 billion between 2019 and 2023.

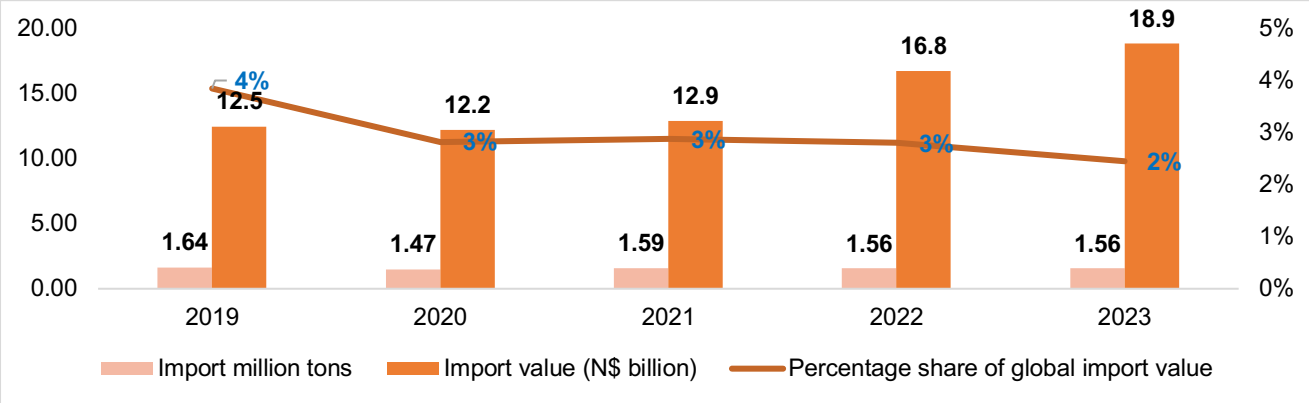


Figure 23: *Sugar import volume, value, and % share of global values by SADC* **Source:** ITC (2024)

Figure 24 below presents the quantities and values of sugar imported by the ten highest African countries. In terms of average annual quantities, South Africa is the highest (430,000 tons), followed by Tanzania (237,000 tons), and Lesotho is the lowest (16,000 tons). In terms of average annual sugar import values, South Africa remains the highest (N$4.4 billion), followed by Angola (N$2.3 billion), and Lesotho is the lowest (N$0.2 billion).

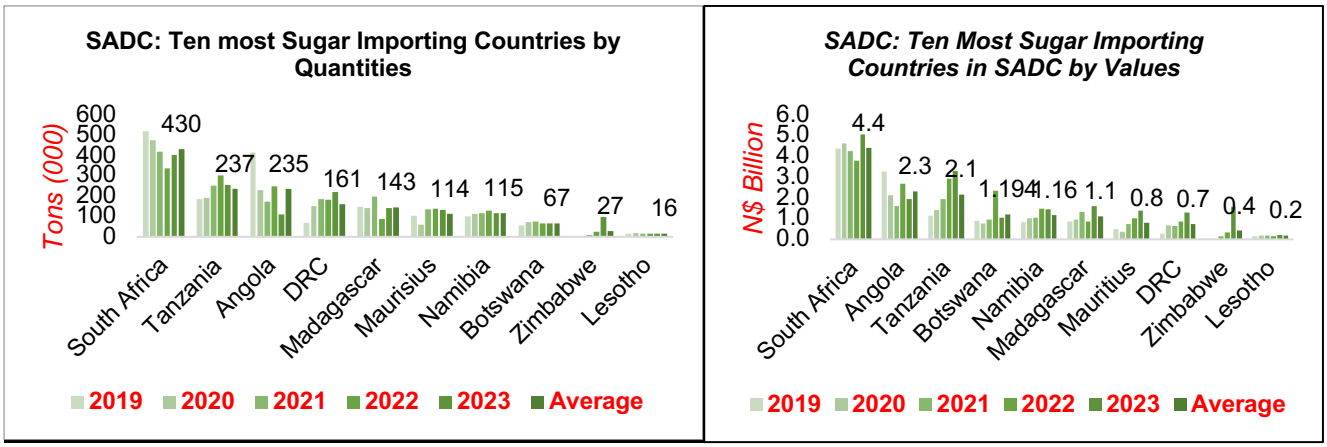


Figure 24: *Top ten sugar-importing countries in SADC (tonnage and values)* **Source:** *ITC (2024)*

Figure 25 below presents the import prices of sugar imported by the ten highest SADC importing countries by value in 2023. The highest price per ton of sugar imported during 2023 was paid by Angola at N$17,609/ton, followed by Zimbabwe at N$16,258/ton, and the least was paid by the Democratic Republic of Congo (DRC) at N$5,829/ton.

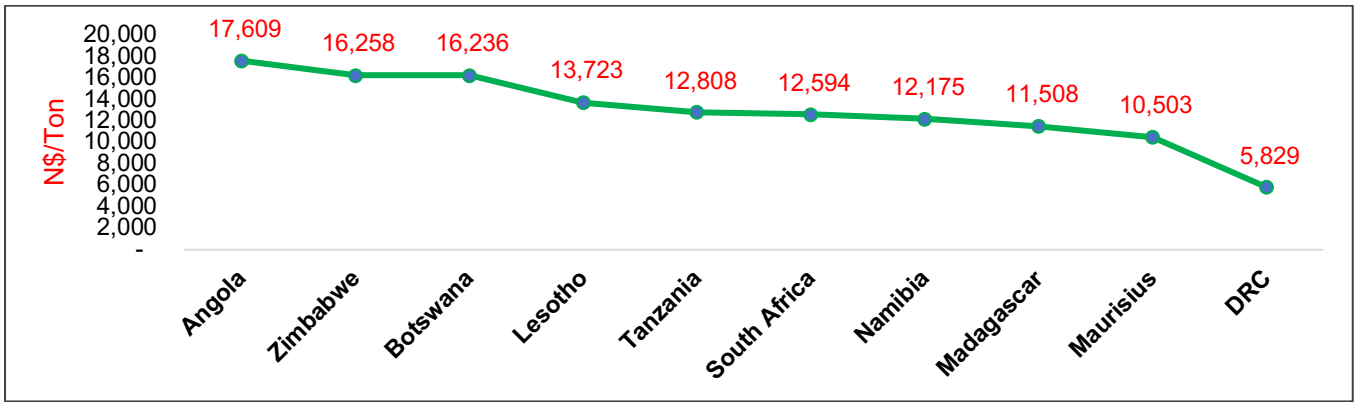


Figure 25: *Sugar price paid by the 10 most sugar-importing countries in the SADC* **Source:** *ITC (2024)*

EXPORTS:

As depicted in **Figure 26** below, the SADC recorded the highest sugar export volumes in 2019 (3.5 million tons), followed by 3 million tons in 2020, and the lowest was in 2022 (1.7 million tons). For export values, the highest was recorded in 2023 (N$25 billion), the second-highest was in 2019 (N$21 billion), and the lowest was in 2021 (N$16 billion). On average, the SADC exported 2.5 million tons per annum, valued at N$19.8 billion/ annum between 2019 and 2023.

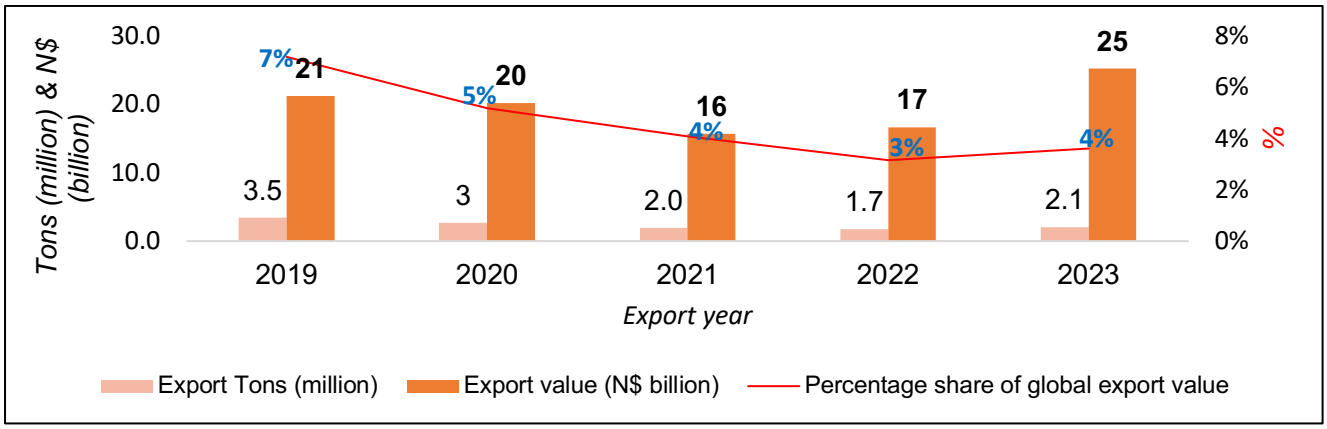


Figure 26: Sugar export volume, value, and % share by the SADC **Source:** ITC (2024)

Figure 27presents the quantities and values of sugar exported by the ten highest Southern African countries. In terms of average annual quantities, South Africa is the highest (894,000 tons), followed by Eswatini (669,000 tons), and Namibia is the lowest (5,000 tons). In terms of average annual values, Eswatini is the highest (N$6.21 billion), followed by South Africa (N$6.17 billion), and Namibia remains the lowest (0,06 billion).

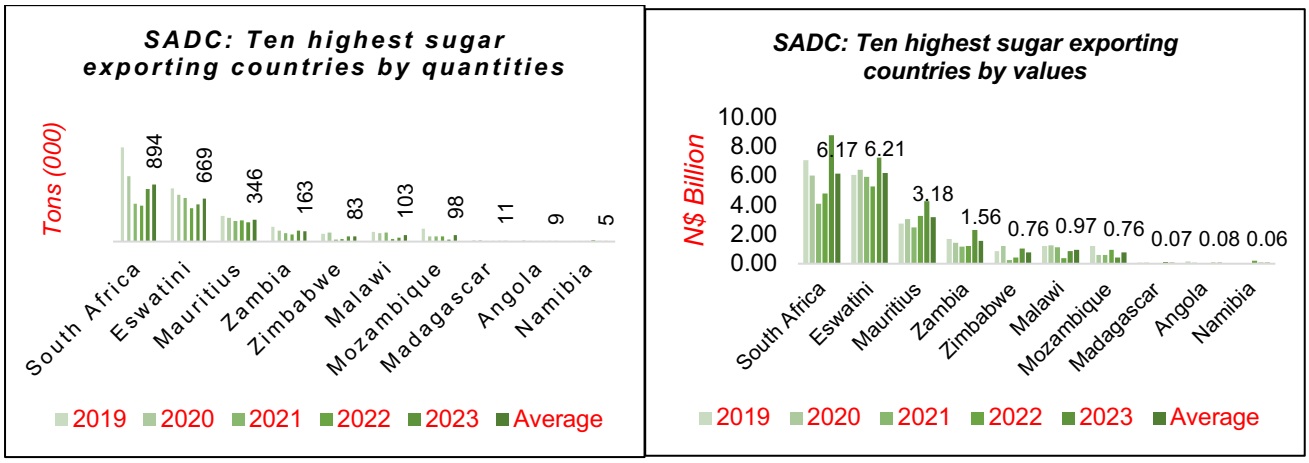


Figure 27: *Ten highest sugar-exporting countries in the SADC (quantities and values)*

Source: *ITC (2024)*

Figure 28 presents the export prices of sugar exported by the ten highest SADC countries by value in 2023. The highest price per ton of sugar imported during 2023 was paid by Mauritius at N$14,347/ton, followed by Angola at N$13,668/ton, and the least was Madagascar at N$9,224/ton.

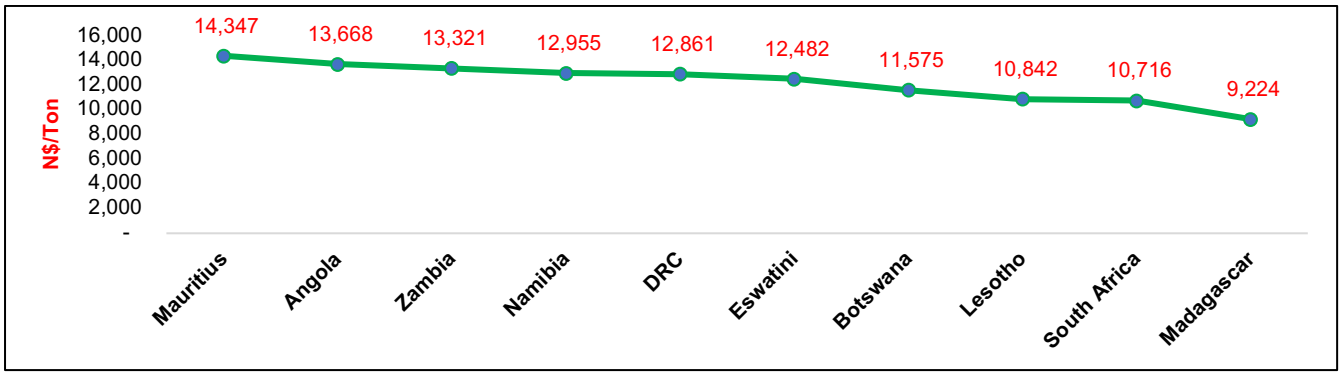


Figure 28: *Import price of sugar fetched by the ten highest sugar-exporting countries in the SADC*

Source: *ITC (2024)*

5. DOMESTIC PERSPECTIVE (NAMIBIA)

PRODUCTION: Due to the lack of sugar cane and sugar beet cultivation, Namibia is not a sugar-producing country. Nevertheless, sugar is imported into Namibia, mainly from South Africa and Eswatini, for packaging and supply to the domestic market and, occasionally, to export markets. **Figure 29** shows that 15,171 tonnes (13.4%) of dark brown sugar, 66,277 tonnes (58.4%) of brown sugar, and 32,036 tonnes (28.2%) of white sugar are packed in Namibia each year. Therefore, the total annual average sugar packed is 113,483 tonnes. In reality, the total sugar quantities packed may equal sugar consumption (Figure 30) plus sugar exported; however, data analysis indicates that not all the sugar packed in a year is consumed or exported within the same year, which accounts for the variance.

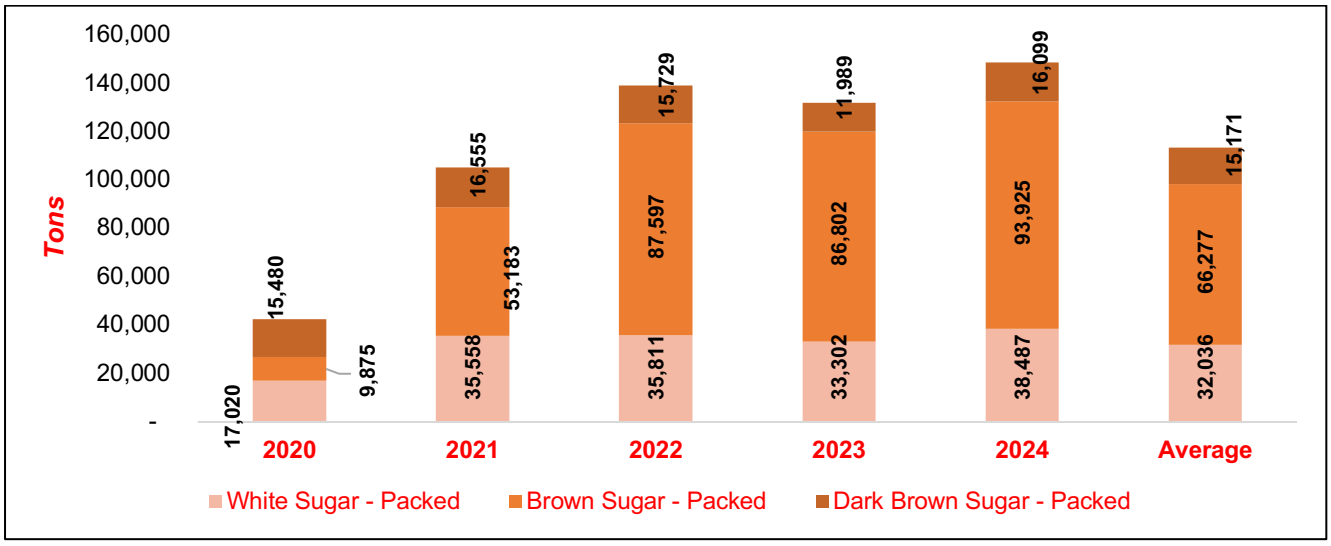


Figure 29: *Quantities of sugar packed per type in Namibia* ***Source:*** *Survey Data*

CONSUMPTION: Figure 30 shows that Namibia consumed an average of 66 thousand tons of sugar per annum. Considering Namibia's population of 3,022,401 people (NSA, 2025), the average per capita sugar consumption can be estimated at around 22 kg per person per annum.

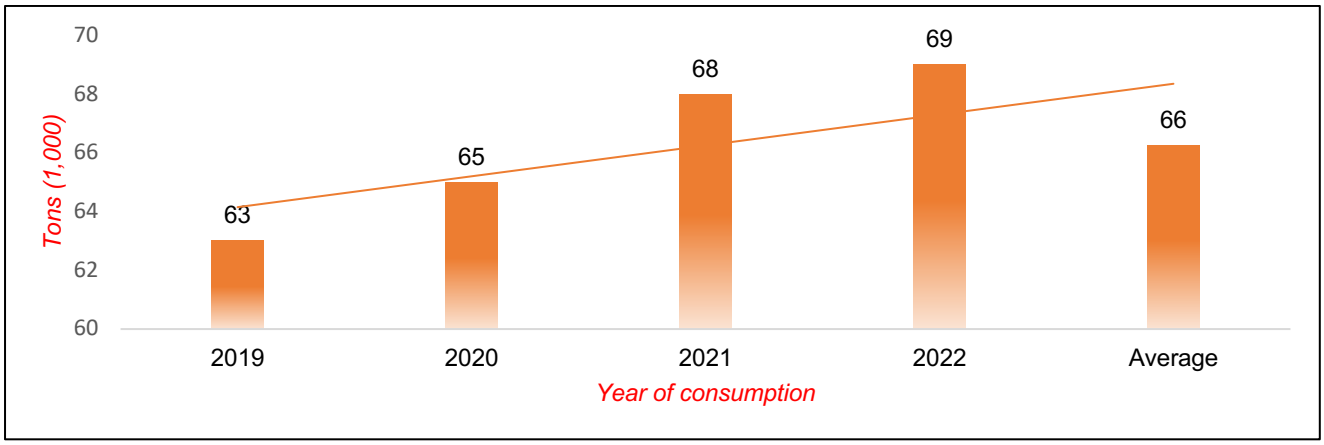


Figure 30: Sugar consumption in Namibia ***Source:*** *World Population Review (2024), NSA (2025)*

IMPORTS*:* Figure 31 presents quantities, values, and prices of sugar imported by Namibia between 2019 and 2023. An average of 115 thousand tons of sugar is imported annually, valued at N$1.2 billion. While both quantities and values have been on the rise between 2019 and 2022, sugar imports declined between 2022 and 2023, both in terms of quantities and values, resulting in a price increase. The import price of sugar into Namibia rose from N$8,108/ton in 2019 to N$12,175/ton in 2023, which is a 50% increase. The sugar price hike is attributed to the scarcity of refined sugar in SACU (Southern African Customs Union), which is due to higher tariffs imposed by international suppliers (Africa-Press Namibia, 2022).

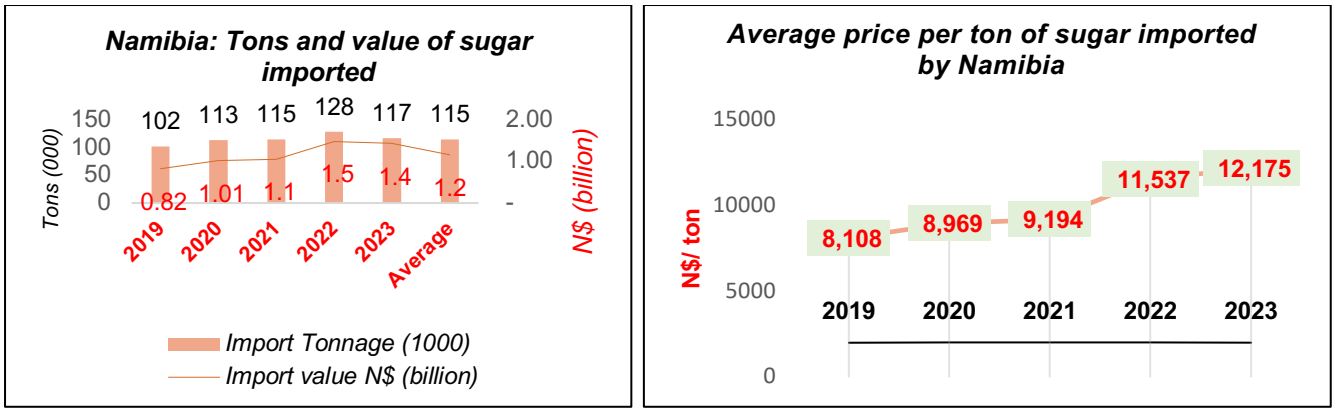


Figure 31: *Namibia's sugar imports from 2019 to 2023* ***Source:*** *ITC (2024)*

Figure 32 shows the supply countries of Namibia's imported sugar, by quantity and percentage share. South Africa is the highest supplier (928,140 tons), with an average annual supply share of 71%, followed by Brazil (295,487 tons), with an average supply share of 23%. Romania is the lowest (36 tons), with an average supply share of 0.003%. The supply share of countries outside the Southern African Customs Union (SACU) is influenced by drought in Southern Africa, leading to a shortage of refined sugar in SACU member countries (Africa-Press Namibia, 2022; FAO, 2024).

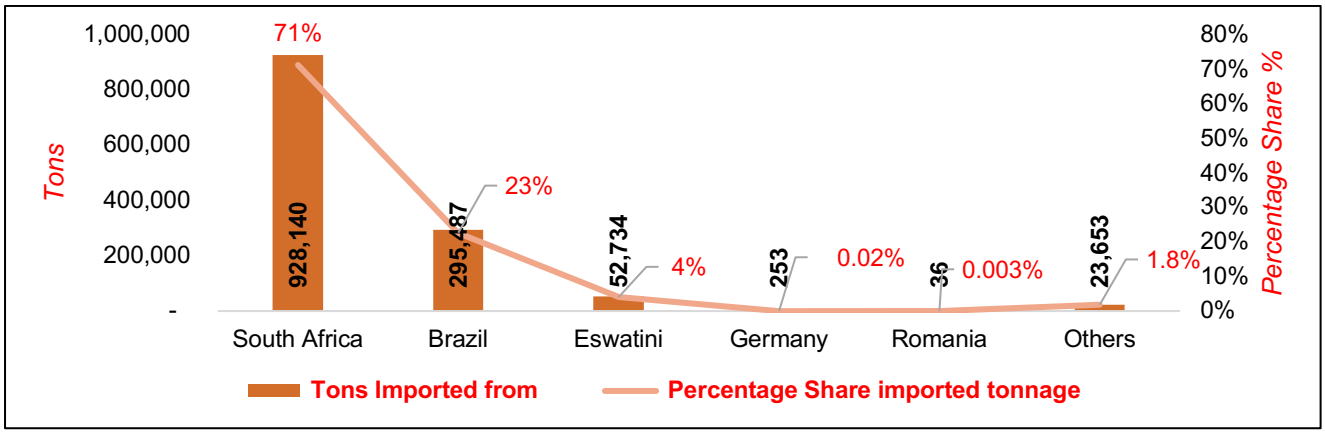


Figure 32: *Average annual tonnage and % share of sugar imported by Namibia*

Source*: ITC (2024)*

RE-EXPORTS: Figure 33 presents quantities, values, and prices of sugar re-exported by Namibia between 2019 and 2023. An average of 4,841 tons of sugar is re-exported by Namibia annually, valued at N$60.7 million (ITC, 2024). Both export quantities and values of sugar have been low until a sudden rise in 2022. The re-export price of sugar from Namibia rose from N$7,302/ton in 2019 to a high of N$13,007/ton in 2022.

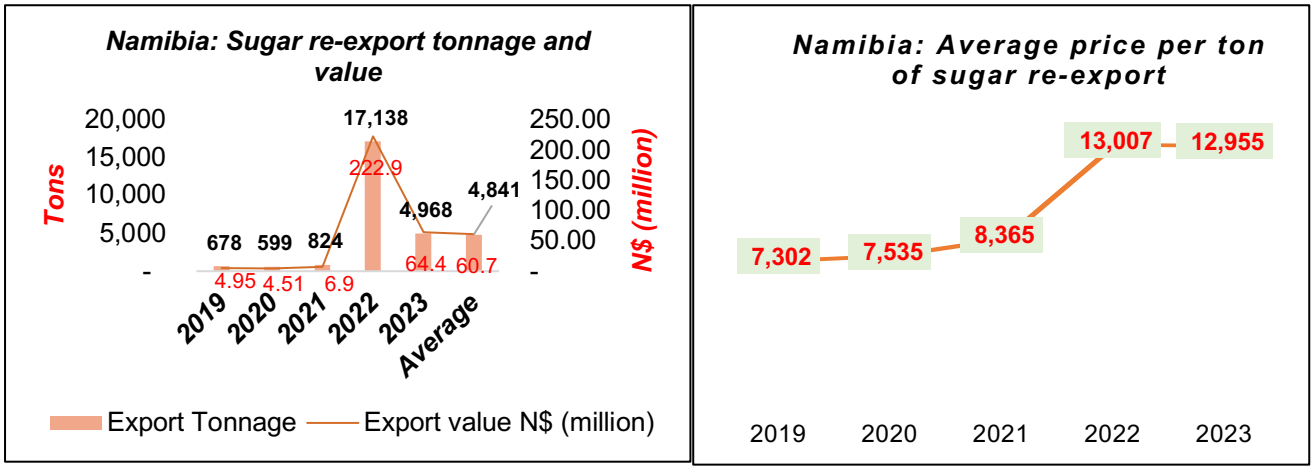


Figure 33: Namibia's sugar re-exports (tonnage, value & price) – 2019 to 2023

Source: *ITC (2024)*

Figure 34 depicts the recipient countries of sugar re-exports from Namibia, in terms of average annual quantities and share of re-exports. In terms of the year's average, Zimbabwe is the highest destination for annual sugar re-exported from Namibia (4,255 tons), with an average annual re-export share of 54%. Botswana follows, with an average annual share of 21% (1,610 tons). DRC is the lowest (25 tons), with an average supply share of 0.3%.

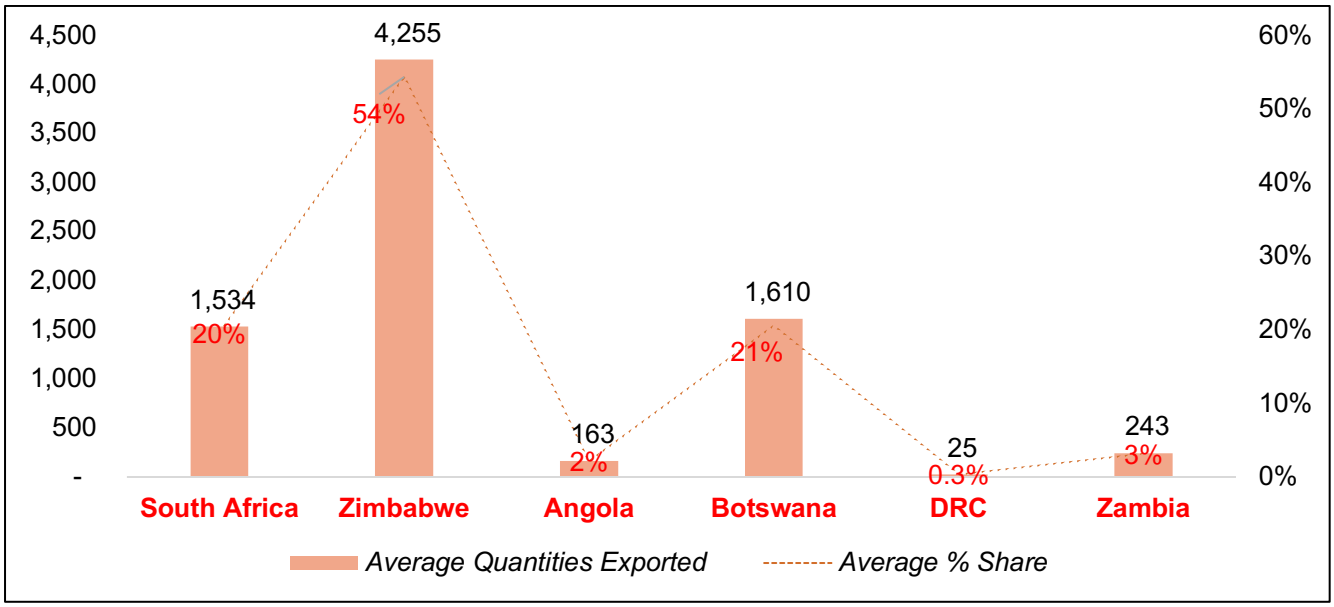


Figure 34: *Quantities and % share of sugar re-exported to various countries from Namibia*

Source: *ITC (2024)*

6. KEY POTENTIALS TO UNLOCK THE DOMESTIC SUGAR PRODUCTION OPPORTUNITY

Namibia has significant potential to enter sugar production to replace average annual sugar imports that exceed 115,000 tons, valued at over N$1.4 billion. Local sugar production could therefore cater to both current domestic consumption and export markets. Domestic consumption of about 69 metric tons of sugar as of 2023 could mean an annual per capita consumption exceeding 22.8kg. Based on a NAB survey, brown sugar (58.4%) is the most common type of sugar imported and packed in Namibia, followed by white sugar (28.2%), and the least is dark brown sugar (13.4%). Hence, the annual sugar import substitution could be estimated as: brown sugar at 67,160 tons, white sugar at 32,430, and brown sugar at 15,410 tons.

Furthermore, Namibia does not produce or import vast quantities of raw sugar cane or sugar beets, key primary input raw materials required for sugar processing. Namibia could therefore only produce sugar if cultivation or importation of sugar crops, such as sugarcane and/or sugar beets, is secured. Hence, there is a pressing need to produce sugar crops in Namibia, as well as to invest in an agro-processing facility for sugar crops ultimately. The production of sugar crops and agro-processing (sugar production) thereof has enormous untapped potential to become a great source of income and employment opportunity for Namibians.

Sugarcane is successfully grown in tropical and subtropical regions. It flourishes best in hot, sunny areas with warm summers and adequate rainfall, and a relatively calm, frost-free ripening and harvesting period is also ideal (FAO, 2021). Northern production zones such as Zambezi, Kavango, Karst, and North Central (Kunene & Ohangwena) are endowed with rivers, some with moderate to high rainfalls, some with underground water aquifers, and a warm climate, hence, an indication of great potential to cultivate sugarcane in these areas, for processing into sugar and other products such as molasses. This analysis therefore recommends that the NAB consider conducting sugarcane cultivation trials in the above-mentioned production zones to identify the optimal regions for sugarcane cultivation and the most fruitful sugarcane varieties.

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