

ISMA's Third Advance Estimate Projects 12% Rise in Net Sugar Output

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The Indian Sugar & Bio-energy Manufacturers Association (ISMA) has released its third advance estimates for the 2025-26 sugar season (SS 2025-26), revising the country's net sugar production to approximately 293 lakh tons after accounting for ethanol diversion. The revised projection reflects a 12 per cent increase over last season's net output.

The estimates were finalised following a comprehensive review by ISMA's Executive Committee during its meeting held on February 25, 2026.

Satellite-Based Assessment Strengthens Forecast Accuracy

In a first-of-its-kind extensive review this season, ISMA procured high-resolution satellite imagery in early February 2026 to assess sugarcane crop status across the country. The satellite-based assessment provided reliable data on:

Area already harvested

Balance cane area yet to be harvested

Regional variations in crop progress

These findings were corroborated with field visits, historical production data, prevailing weather conditions, current yield and sugar recovery trends, and expected performance during the remaining crushing period.

State-Wise Observations

Uttar Pradesh:

Sugarcane yields in Uttar Pradesh were lower than earlier projections, primarily due to the ongoing varietal replacement programme in the state, which has temporarily affected productivity. However, sugar recovery rates are higher than last season, partially offsetting the yield shortfall.

Maharashtra and Karnataka:

In the key sugar-producing states of Maharashtra and Karnataka, yields per unit area have been lower than initially anticipated, despite reasonable recovery levels. The decline has been attributed to early onset of flowering from January across several cane-growing regions, rather than being confined to traditional river belts.

ISMA noted that abnormal weather patterns, including excess rainfall during critical growth phases, triggered premature flowering. This accelerated maturity, reduced biomass accumulation, and resulted in lighter stalks with lower productivity. Additionally, higher crushing rates this year shortened the effective harvesting window, limiting late-stage biomass gains.

Revised Production Estimates for SS 2025-26

ISMA's updated outlook is as follows:

Gross Sugar Production: ~324 lakh tonnes

Estimated Diversion for Ethanol: ~31 lakh tonnes

Net Sugar Production: ~293 lakh tonnes

The ethanol diversion estimate is based on state-wise ethanol supply allocations and expected cane crushing during the balance of the season.

State-Wise Production Snapshot (Lakh Tonnes)

Uttar Pradesh: Gross 98.5 | Net 92.5

Maharashtra: Gross 118.0 | Net 106.0

Karnataka: Gross 61.04 | Net 48.49

Tamil Nadu: Gross 8.29 | Net 8.20

Gujarat: Gross 8.76 | Net 8.73

Others: Gross 29.5 | Net 29.0

Total estimated gross production stands at 324.09 lakh tonnes, with net production at 292.92 lakh tonnes (approximately 293 lakh tonnes) after ethanol diversion.

The upward revision underscores stable recovery levels and improved cane availability in key states, despite yield challenges arising from climatic factors and crop transitions. ISMA indicated that the final output will depend on crushing performance and recovery trends during the remaining period of the season.