

Got Rum?®

AUGUST 2026

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COOKING WITH RUM - ANGEL'S SHARE
CIGAR AND RUM PAIRING - THE RUM MIXOLOGIST
PAUL'S SPIRITED TRAVEL - THE RUM LABORATORY
RUM IN THE NEWS - THE SWEET BUSINESS OF SUGAR



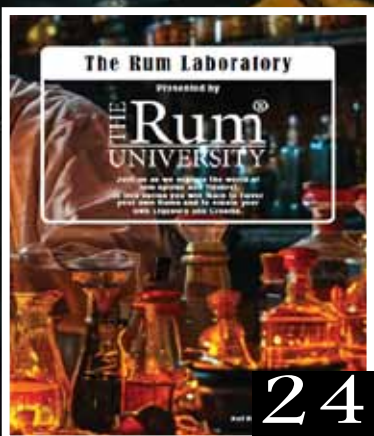
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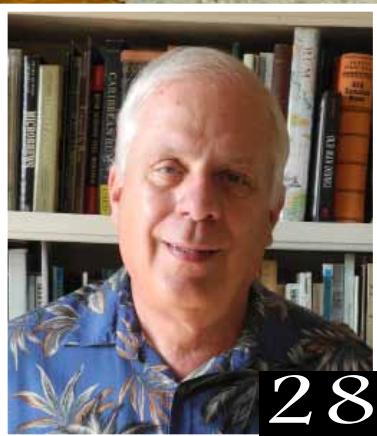
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Got Rum?®

Printed in the U.S.A.
A publication of Rum Runner Press, Inc.
Taylor, Texas 76574 - U.S.A.

Tel/Fax +1 (855) RUM-TIPS
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August 2026

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WWW.GOTRUM.COM

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FRONT COVER: Inner and Outer Peace
INSIDE SPREAD: Spiritual Retreat

FROM THE EDITOR

Optimism And Courage During Difficult Times

I often speak with industry members and consulting clients about the importance of being optimistic about the future, especially for people who are leading their companies. The responses usually agree with my views, but sometimes they take the form of:

"I'm too busy fighting problems to think about being optimistic" or

"Optimism doesn't win fights, courage does!"

To some people, optimism and courage are different personality traits, but for me, they are connected at their core. **Optimism** is usually defined as "*a belief that the future will be good and that things will work out well*", while **Courage** is usually defined as "*the choice to face fear, pain, hard times, or great risk.*" Courageous people may not think of themselves as being optimists, but when they chose to face fear, pain, hard times or great risk, it is because they believe that the results will be worth it. In other words, they believe that the future will be good after their acts of courage. Doesn't this sound like the definition of optimism?

Ernest Shackleton (the British-Irish explorer, who led three expeditions to Antarctica in the early 1900s) definitely knew what courage looked like. After their ship, Endurance, was crushed in ice floes in 1915, Shackleton spent two years leading his team of 27 men to safety!

There are many great Shackleton quotes about courage and bravery, but one in particular stands out to me:

*"The quality I look for most is optimism: especially optimism in the face of reverses and apparent defeat.
Optimism is true moral courage."*



Discussing the differences between the two words, however, is not as important as making sure that you try to embody at least one of those traits, especially during difficult times. As the distilled spirits industry continues to adapt and react to the new distribution challenges, make sure that your colleagues and employees can see you as someone who provides them with the **optimism** to see a better future and the **courage** to take the steps to get there.

Cheers!

Luis Ayala, *Editor and Publisher*

LinkedIn

<http://www.linkedin.com/in/rumconsultant>

Do you want to learn more about rum but don't want to wait until the next issue of "Got Rum?"? Then join the "Rum Lovers Unite!" group on LinkedIn for updates, previews, Q&A and exclusive material.

THE ANGEL'S SHARE

by Paul Senft



My name is Paul Senft - Rum Reviewer, Tasting host, Judge and Writer. My exploration of Rums began by learning to craft Tiki cocktails for friends. I quickly learned that not all rums are created equally and that the uniqueness of the spirit can be as varied as the locales they are from. This inspired me to travel with my wife around the Caribbean, Central America, and United States visiting distilleries and learning about how each one creates their rums. I have also had the pleasure of learning from bartenders, brand ambassadors, and other enthusiasts from around the world; each one providing their own unique point of view, adding another chapter to the modern story of rum.

The desire to share this information led me to create **www.RumJourney.com** where I share my experiences and reviews in the hopes that I would inspire others in their own explorations. It is my wish in the pages of "Got Rum?" to be your host and provide you with my impressions of rums available in the world market. Hopefully my tasting notes will inspire you to try the rums and make your own opinions. The world is full of good rums and the journey is always best experienced with others.

Cheers!

Angostura 1919 Grand Reserve

I came across this bottle while shopping at one of my local stores and realized that the overall look of the product was quite different than I remembered. I selected the last bottle on the shelf with the hopes of giving it a proper review in mind. Angostura 1919 Grand Reserve rum has an intriguing marketing story, and I recommend reading it if you are so inclined. This is a molasses-based rum that is made using a continuous column still rum and aged in used bourbon barrels for seven to nine years at the company's aging facilities in the Port of Spain, Trinidad. Older incarnations of this product had an age statement of eight years. The final product is blended to 40% ABV and packaged in 750 ml bottles for the U.S. market.

Appearance

Over the years I have seen the bottle evolve from a heavy-based bottle with a large wooden cap that was sold in a filigreed box. The second incarnation was a taller bottle, had different labels, had a cheaper cap, and was sold in white boxes. Now the new bottling uses a short-necked, bottom-heavy bottle that uses an eye-catching multicolored security wrap covering the neck and cap of the bottle. The top of the bottle has the Angostura butterfly emblem that matches the logo on the front label. Removing the wrap revealed the wooden cap, holding a synthetic cork secure to the bottle. The front and back labels provide basic information about the rum, with the back label having the bonus of a QR code with additional product information.

The liquid in the bottle and glass holds a dark golden amber color in the bottle and lightens slightly in the glass. Swirling the

liquid produces a thin band that thickens and releases multiple waves of slow- and fast-moving legs before leaving a ring of residue around the tasting glass.

Aroma

The aroma leads with a strong vanilla note that is followed by oak char, dark cacao, baking spices, praline, and dried fruit.

Palate

The sweet vanilla and oak notes swirl on the tongue as the alcohol conditions the palate. Spice notes of nutmeg, baking spices, and ginger form the midline as the dark cacao and charred oak barrel tannins form the base. Additional sips reveal the dried fruit from the aroma, such as dried apricots, raisins, honeyed pineapple, and coconut. The oak tannins emerge and form a long mineral rich finish that lingers on the palate for quite some time.

Review

I picked this rum up with no expectations other than that it was a known, respected brand to me, and I was not disappointed by the dynamic flavor profile. Serviceable as a cocktail ingredient and sipping rum, it delivers good value, and the price lands right with other rums in this age category. I particularly enjoyed the interplay of the oak tannins with the fruit and spice notes, as it added a level of complexity that was pleasant to experience. For those interested in experiencing a mid-range rum from Trinidad and Tobago, I find this rum to be an easy recommendation for rum enthusiasts who enjoy sipping rums.



www.angostura.com

THE ANGEL'S SHARE

by Paul Senft

Don Q Reserva Rum

Over the past decade it has been interesting to watch the evolution of the Don Q rum brand grow from three expressions to its current range of 18 different expressions. The distillery and aging facilities are located in Ponce, Puerto Rico. This year the brand has released two new products: the Reserva and Reserva Especial. The Reserva rum is a blend of column still rums aged in used bourbon barrels for a minimum of five years and blended to 40% ABV before bottling.

Appearance

The 750 ml bottle is in the standard custom design that the brand uses for its core products, sealed with a screw top. The front and back labels are loaded with information about the brand and the rum.

The rum has a light golden amber color in the bottle, and it lightens slightly in the glass. Swirling the liquid creates a thick band that releases a single wave of fast-moving legs, then additional waves of slower-moving legs.

Nose

The aroma of the rum leads with caramelized vanilla and is quickly followed by notes of dried fruit and light oak tannins.

Palate

The first sip was solidly balanced between the vanilla notes and the light astringency of the oak notes. Additional sips reveal notes of brown sugar, raisins, prunes, and a hint of baking spices and salt. As the rum begins to fade, the caramel notes drift in, followed by the oak tannins that linger on the palate in a light peppery finish.

Review

The flavor of the profile revealed a well-balanced rum that successfully bridged the gap between Don Q Gold and Don Q Reserva seven year old expressions. The price point is in line with other rums of this age range, but the blenders avoided the flavor profile having the raw oak and strong ethanol notes usually encountered with a five year old blend. For cocktail makers who use Don Q Gold, this rum provides a solid bump in flavor and is a hearty substitution or replacement as an ingredient.



www.donq.com

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COOKING WITH RUM

**Bringing the Spirit of the Cane
Into the Heart of the Kitchen!**

by Chef Susan Whitley





Pineapple Rum French Toast

This recipe contains all the flavor ingredients typically associated with cozy, home-made dessert delights that are sure to put a smile on people's faces: sugar, cinnamon, coconut and rum! it is perfect for Sunday brunch or, let's be honest, any day of the week you need to feel a bit pampered!

Ingredients:

- ½ C. Butter
- 12 Slices Bread
- 1 C. Brown Sugar, divided into two ½ cup measurements
- 2 tsp. Ground Cinnamon, divide into 1 teaspoon measurements
- 1 C. Canned Crushed Pineapple
- 5 Eggs
- 1¼ C. Coconut Milk
- ¼ C. Dark Rum
- Sweetened Shredded Coconut, to taste

Directions:

1. Melt butter in a saucepan then pour into a 9×13 casserole dish.
2. Layer 6 pieces of bread into the dish. Spread the chopped pineapple across all the slices of bread.
3. Sprinkle ½ cup of brown sugar on top of the pineapple then sprinkle 1 teaspoon of cinnamon and shredded coconut across everything.
4. Place the next 6 pieces of bread on top of each of the original slices (like a sandwich) and repeat the process again: layer of pineapple, layer of brown sugar and sprinkle the remaining teaspoon of cinnamon and the shredded coconut across the top.
5. In a mixing bowl, whisk together the eggs, coconut milk and dark rum. Pour this over the entire dish.
6. Cover with foil and refrigerate for at least 1 hour. If you can refrigerate overnight it is better, gives bread time to really absorb the liquid and flavors.
7. Take the dish out of the refrigerator and preheat oven to 350°F. Leave dish covered with foil and bake for 30 minutes. Remove the foil and return to oven for 15 minutes. Ready to Serve!
8. Options: Sprinkle powdered sugar and more coconut and serve with pancake syrup (or maple syrup), butter and whipped cream.



Photo Credit: www.alwaysbcmom.com

THE RUM Mixologist

A space devoted to the exploration
of classic and new rum cocktails

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A close-up photograph of a bartender's hand, wearing a white shirt, pouring a clear liquid from a bottle into a glass. The glass is filled with ice cubes and sits on a dark, perforated metal bar surface. The background is dark and out of focus, with warm, bokeh-style light spots.

What Is Mixology?

Mixology is the study and skill of inventing, preparing and serving cocktails and other mixed drinks. Mixologists are experts in this field, but mixologists' knowledge goes beyond memorizing basic cocktail recipes: it includes historical information, basic chemistry behind flavor combinations and a capacity for combining common ingredients in new ways.

Join us, as we explore the essential collection of rum cocktail recipes that every mixologist needs to master.



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THE RUM Mixologist

This Month's Cocktail:
Painkiller

The Painkiller was invented in the 1970s at the Soggy Dollar Bar in the British Virgin Islands (BVI). It is a twist on the Piña Colada and is typically made with Pusser's Rum, a recreation of the British Royal Navy rum that was issued to Royal British Navy sailors until 1970. Pusser's pays homage to that rum and is made in the same style, blended on the BVI island of Tortola to the same proportions as the original.

Ingredients

- 2 ounces Pusser's Rum
- 4 ounces Pineapple Juice
- 1 ounce Orange Juice, freshly squeezed
- 1 ounce Cream of Coconut
- Garnish: Nutmeg, freshly grated
- Garnish: Pineapple Wedge

Directions

1. Add the rum, pineapple juice, orange juice and cream of coconut to a shaker with cubed ice and shake vigorously but briefly to combine.
2. Strain into a hurricane glass or snifter over crushed ice.
3. Garnish with freshly grated nutmeg and a pineapple wedge.
4. Serve with a straw.

Source: www.liquor.com

A glass of amber-colored rum sits on a crumpled newspaper. In the background, several books are stacked, creating a library-like atmosphere. The lighting is warm and focused on the glass.

THE Rum[®] UNIVERSITY LIBRARY

Reviews of books related to sugarcane, milling, fermentation, distillation, aging, blending and other topics related to the production or history of rum.

www.RumUniversity.com

The Authentic Brazilian Cookbook : A Journey Through Brazil's Flavors, Stories, and Soulful Traditions by Lucia Veiga

(Publisher's Review)

Bring the Soul of Brazil to Your Table - Authentic Recipes, Stories & Traditions for Real Home Cooks

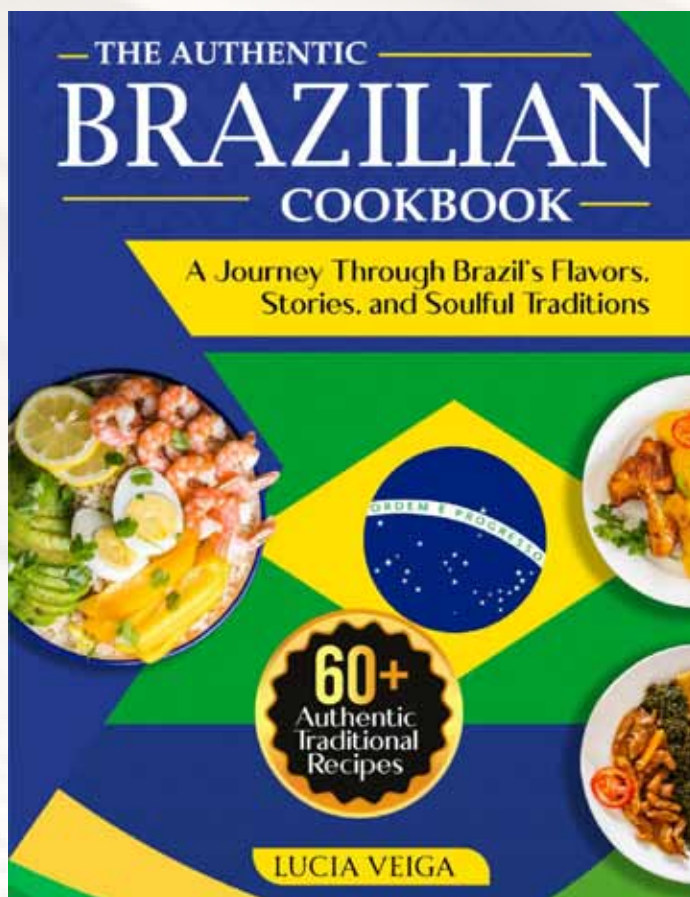
What if your next dinner party could travel Brazil—no plane ticket, just clear recipes and authentic technique?

Tired of “inspired by” versions that miss the heart of Brazilian food?

“The Authentic Brazilian Cookbook” brings the real flavors, stories, and traditions of Brazil into your kitchen with standard American measurements and step-by-step guidance that simply works.

Discover a true taste of Brazil with:

- 60 Authentic Recipes - Party favorites, soulful mains, essential sides and beloved sweets.
 - Cultural Context That Matters - The Indigenous, Portuguese, African, and immigrant influences behind each dish plus regional notes so you know why and how Brazilians cook this way.
 - U.S. Friendly & Fail-Proof - Plain-English methods, pantry swaps, and practical tips tailored to American home kitchens.
 - Vegetarian & Celebration Chapters
 - Flavor-packed plant-forward classics and festive showstoppers.
 - Bonus Drinks - Crowd-pleasers from Caipirinha and Batida de Coco.
 - Smart Shopping Help That Saves You Time - A complete Brazilian Shopping List organized by category so you know exactly what to buy.
- Cook with confidence:
- Clear steps and standard U.S. units in every recipe
 - Ingredient notes, timing cues, and serving suggestions for effortless hosting
- Authentic flavor without hard-to-find techniques



If you're a curious home cook, a Brazilian living abroad, or the friend who always hosts, this book turns groceries into vibrant, memory-making meals - with the culture and context that make every bite meaningful.

ASIN: B0FMTC7SH3
Publisher: Independently published
Publication date: August 13, 2025
Language: English
Print length: 80 pages
ISBN-13: 979-8298074964
Item Weight: 9.3 ounces
Dimensions: 8.5 x 0.19 x 11 inches

The Drinks Of Brazil



If you are interested in learning about the culture and gastronomy of Brazil, then there is nothing better than travelling there. If this is not possible, however, the next best thing is to explore it through its food and drinks, which may be available via restaurants or specialty stores that cater to Brazilians around the world. Here is a brief list of beverages that everyone should try at least once:

- **Aluá:** prepared with maize, rice and sugar. It has also been referred to as corn wine.
- **Bombeirinho:** prepared with cachaça and gooseberry syrup, it is similar to a *Kir Royal* cocktail.
- **Cachaça:** a distilled spirit made from sugarcane juice. It is the most popular alcoholic beverage in Brazil. It is also informally referred to as *cana*, *caninha* and *pinga*.
- **Caipirinha:** a cocktail prepared using cachaça, lime juice and sugar.



- **Caju Amigo:** also known as cajuzinho (little cashew), is a Brazilian drink made of cachaça and cashew juice.
- **Cajuína:** a non-alcoholic, non-carbonated beverage made of blended cashew apples. It is traditional in the northeast region of Brazil, especially in the state of Piauí.
- **Capeta:** a cocktail prepared with vodka and sweet skim milk.
- **Cauim:** a traditional alcoholic beverage or beer of the Indigenous peoples in Brazil since pre-Columbian times. It is also made in remote areas throughout Panama and South America. Cauim is produced by fermenting manioc (a large starchy root), or maize. It is sometimes flavored with fruit juices. The Guna Indians of Panama use plantains.
- **Chá mate gelado:** Roasted erva mate (*Ilex paraguariensis*) iced tea. Famous in homes and Rio de Janeiro, sold at its beaches.
- **Chimarrão:** is a caffeine-rich infused herbal drink made with yerba mate (*Ilex paraguariensis*), a plant which originates in the Southern Cone of South America. It is especially popular in South America and the Levant.
- **Guaraná:** The processing of the fruit syrup began in Brazil in 1905 by Fara, a physician from the city of Resende, Rio de Janeiro. A soft drink factory, Guaraná Cyrilla, was launched by F. Diefenthaler in 1906 in Santa Maria, Rio Grande do Sul. The drink initially was astringent and markedly bitter, and it did not become popular. The soft drink was created by Pedro Baptista de Andrade, who sold the formula to Antarctica, which then developed a process to eliminate the astringency and bitterness, emphasizing the characteristic flavor and aroma of the fruit, launching Guaraná Champagne Antarctica in 1921. Today, there are several brands of guarana soda available throughout Brazil.
- **Jurubeba:** a digestif made using the nightshade *solanum paniculatum*.
- **Limonada suíça:** prepared with lime pieces with peel, ice cubes, sugar, and water. The version with condensed milk is also popular.
- **Quentão:** means “very hot” or “big hot one”, is a hot Brazilian drink made of cachaça and spices. It is often served during the celebrations known as Festas Juninas. The sugar is first caramelized with spices (whole cloves, cinnamon sticks and ginger chunks) and citrus peels (orange and lime). This mixture is then boiled with water for 10 minutes. The cachaça is added and boiled for another 5 minutes.
- **Rabo de galo:** the name literally means ‘cock tail’. In Brazilian Portuguese, a “cocktail” is called *coquetel*. **Rabo de galo** is a drink made of cachaça and red Vermouth. The history of the Rabo de Galo dates back to 1950s and the inauguration of the Cinzano factory in São Paulo, Brazil.
- **Tiquira:** a cachaça beverage prepared with manioc.
- **Umbuzada or imbuzada:** a drink prepared with cooked umbu fruit, milk, and sugar.
- **Vinho Quente:** a mulled wine, also known as spiced wine, is an alcoholic drink usually made with red wine, along with various mulling spices and sometimes raisins, served hot or warm. It is a traditional drink during winter, especially around Christmas.





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The Rum Laboratory

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Join us as we explore the world of
rum spices and flavors!
In this series you will learn to flavor
your own Rums and to create your
own Liqueurs and Creams.



The Rum University® Laboratory

Presents

making your own

Honey Rum Liqueur

The smell of honey is enough to make many people salivate. Perhaps it is in our DNA to recognize honey as a quick source of energy, or as a sweet reward after a long day of hunting or planting. Regardless of the reason, honey has always been a part of human's diet, either as a food or a beverage. Most societies have even incorporated it into the making or flavoring of fermented and/or distilled beverages.

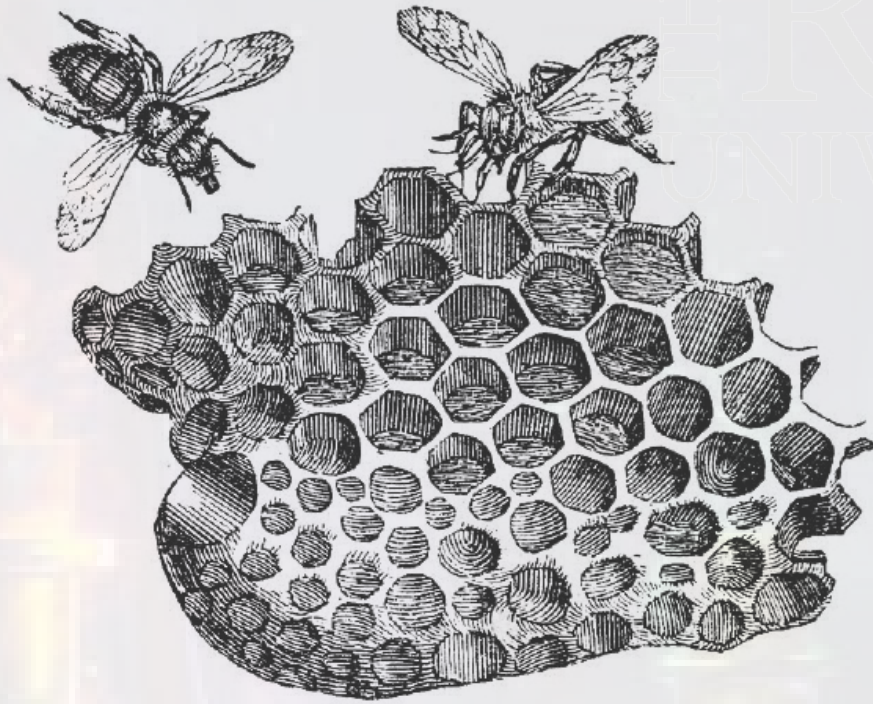
It seems our infatuation with honey will be eternal. So we would like to share with you an easy Honey Rum Liqueur recipe that might become a new staple in your household.

Ingredients

- 5 cups Sugar
- 5 cups Water
- 5 cups Honey
- 5 cups Rum, medium or heavy-bodied

Procedure

1. Combine the sugar and the water in a thick pan and bring the mixture to a boil over medium heat, stirring constantly to prevent burning or caramelization of the sugar.



2. Once all the sugar has been dissolved, turn off the heat and let the mixture cool down. Transfer the syrup into a large glass jar (1 gallon or larger). Add the honey and the rum and shake or stir until all ingredients are thoroughly combined.
3. Skim off any foam that may form on the surface (you may have to repeat this process a couple of times over the first few days until all the foam is gone).
4. Store the container in a cool, dark place and let it sit there for 2 to 4 weeks.

Makes approximately 1 gallon.

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RUM IN THE NEWS

by Mike Kunetka



ANGOSTURA



These are the most recent and noteworthy headlines in the rum industry. If you want us to share your news with our readers, please send me an email to: Mike@gotrum.com.

Angostura recently provided support to ongoing relief efforts in Venezuela through a donation of its carbonated beverage, Angostura® Chill. This donation was made to provide aid in the ongoing relief efforts following the devastation caused by the earthquake which occurred in June of 2026. The donation forms part of the company's commitment to providing support in times of need and assisting during humanitarian emergencies. The shipment of over 500 cases of Angostura® Chill Lemon Lime and Bitters and Angostura® Chill Sorrel and Bitters, will help provide much-needed beverage supplies to individuals and families impacted by the disaster. "At Angostura, we believe that businesses have a responsibility to support communities beyond their borders, particularly during periods of hardship. We stand in solidarity with the people of Venezuela and hope that this contribution will assist ongoing relief and recovery efforts. This donation underscores Angostura's belief that businesses can play a meaningful role in fostering resilience and helping communities recover during challenging times," said Ian Forbes, Chief

Executive Officer. Angostura's Chairman Mr. Gary Hunt added, "As a company deeply connected to the Caribbean and Latin America, we believe that collaboration is essential in times of adversity. Recovery from a disaster of this magnitude requires the coordinated efforts of governments, relief organizations and the private sector. We are proud to support this initiative and remain committed to helping strengthen the region and advance resilience." <https://angostura.com/>

CAMPARI SELLS TROIS RIVIÈRES, MAISON LA MAUNY AND DUQUESNE

Global Drinks Intel Magazine reported that the Campari Group has revealed two pending deals, one selling Bisquit & Dubouché Cognac and Cabo Wabo Tequila to Cobblestone Brands and one selling rum business Bellonnie et Bourdillon Successeurs to a "French private industry player". The Martinique subsidiary Bellonnie et Bourdillon Successeurs, owns the rum agricole brands Trois Rivières, Maison La Mauny and Duquesne.

Campari Group acquired French company Bellonnie & Bourdillon Successeurs, from Compagnie Financière Chevrillon in July 2019. While the sum paid was not disclosed, Campari Group said the company's reported sales value in 2018 was EUR24.1m (then-\$22.8m). At the time, the Aperol brand owner described Trois Rivières and Maison La Mauny as "strategic premium brands with a strong presence in France and potential for international growth", while Duquesne was positioned as "a brand designed for the local market". Now, all brands included in the sales have been categorized as "non-priority assets".

<https://www.campari.com/en-us/>

KULEANA RUM WORKS

Kuleana has announced the sixth installment in the Special Release Program, Australia 14. This rum was pot distilled in April of 2009 from a molasses fermentation at Australia's oldest registered rum distillery, founded in 1884 on the banks of the Albert River in Queensland. It was aged locally for 12 years in an undisclosed barrel. In January of 2023 it travelled to the Netherlands and into a once-used bourbon barrel, where it aged for another two years. It came out of the barrel at 68.8% ABV and was proofed down to 45% before bottling. <https://kuleanarum.com/>

G.R. SHUTTER'S COHASSET PUNCH

Described as a rum punch by some and as a liqueur by others, Cohasset Punch is a blend

of rum, vermouth, orange bitters, and canned peaches. Invented in the 1890s in Chicago, Cohasset Punch quickly became the Midwest's "it" drink for several decades. But it was actually inspired by New England. Cohasset Punch was concocted by renowned mixologist Tom Newman who, alongside businessman Lewis Williams, owned Williams & Newman, a famous Gilded Age Chicago saloon specializing in fancy cocktails. The story goes that Williams visited friends in the New England town of Cohasset, Massachusetts, where rum punch was the regional specialty. Determined to impress his friends, Williams called on his business partner to come up with the best rum punch recipe. Newman invented the drink in 24 hours, sending a cask of it over to its namesake town, wowing Williams' friends. Its success prompted Newman to make Cohasset Punch a regular cocktail item on the Williams & Newman menu, and by 1899, Cohasset Punch was being bottled and distributed. Saloonkeeper Carl Laudner of the Ladner Bros. bar took over bottling and distribution upon Williams and Newman's retirement in 1916. The punch became a mainstay at bars and restaurants around Chicago until 1986, when Ladner Bros. closed, and Cohasset Punch quickly faded into obscurity. Cohasset Punch disappeared from menus and liquor shelves for the last 30 years or so, but it has recently seen a revival. In 2019, Gregory Shutter, a curious graphic designer-turned-mixologist, took a deep dive into Google searches on Cohasset Punch's history and original recipes. The search became an obsession, resulting in Shutter coming up with his own formula that he produced, bottled, and debuted in 2024. Now you can find the bottles of G.R. Shutter's Cohasset Punch on shelves in Illinois or order them online for shipping to most U.S. states. <https://www.cohassetpunch.com/>

PUERTO RICO DISTILLERY

For more than a century, the building at 402 5th Avenue in Brunswick, Maryland has been a place where Brunswick residents worked, created, and built their community. Over the years it has served as a clothing factory, an umbrella factory, and a woodworking shop amongst other things. Now it begins a new chapter as the home of Puerto Rico Distillery. Guests will also have the opportunity to visit the Cultura Plenera Cultural Center which opened in the building earlier this year. Angel Rivera explained "When looking where to relocate our distillery in Frederick, we were drawn to this building because it already had a story. For more than a hundred years it had been a place where people came to work,

create, and build a future. We are honored to continue that tradition by combining efforts with Cultura Plenera to create spaces where people can experience Puerto Rican culture. And we got lucky that Brunswick has a dynamic group of people in Brunswick Main Street and Brunswick Planning & Zoning that have been instrumental in our ability to reach this milestone.” This summer, father-and-daughter team Angel and Crystal Rivera celebrate the opening of Puerto Rico Distillery’s new home with the release of Clandestino Añejo. Only 218 individually numbered bottles were produced from a single bourbon whiskey barrel, making it the most exclusive release in the distillery’s history. Founder supporters received first access starting on July 24, 2026, with the remaining bottles available to the public on August 1, 2026. This release marks the first time Puerto Rico Distillery has aged its pitorro (Puerto Rican moonshine rum) in a bourbon whiskey barrel, creating a unique and distinctive expression that honors Puerto Rico’s rich rum-making heritage while showcasing the innovation and craftsmanship of Maryland’s growing craft spirits industry.
<https://www.puertoricodistillery.com>

FREGATE ISLAND – A RESORT WITH ITS OWN DISTILLERY

After three years of extensive renovations and substantial upgrades, the Seychelles paradise of Fregate Island will reopen later this year. One of the most unique new additions will include an onsite distillery outfitted with a custom 60-liter still. “The distillery is a key part of our circular economy,” explain Lucas Girod and Richard Lee of Fregate Island’s Food and Beverage Department. Rooted in a waste-to-wealth philosophy, the distillery program transforms surplus island produce into spirits so that its addition exhibits not just an immersive guest experience but a key part of their sustainability programming. They told Forbes writer Jillian Dara “The project was born from a desire to capture the soul of Fregate Island in a bottle and offer our guests a narrative they can truly taste. The distillery stands as a centerpiece of our commitment to local sourcing and authentic storytelling. Rum is the natural flagship spirit for the Indian Ocean and for this unique island. We have named our signature spirit Pirates Ruin Rum, a nod to the island’s storied past and the actual pirate ruins located right here on Fregate. The specific sugarcane varieties we grow here, combined with our unique climatic conditions, deeply influence the flavor of the juice. Guests can participate in a hands-on, start-to-finish distilling experience, from production to

do-it-yourself bottling. We also want our guests to experience the “terroir” of the sugarcane fields located near the distillery. Our process is designed to be transparent and sustainable; every part of the sugarcane stalk is used. The juice becomes our rum, the bagasse generates energy, and the distillation waste, known as “vinasse”, becomes fertilizer that goes back into the earth to feed the next harvest. It is a beautiful, closed-loop system that guests will be able to see in action.”
<https://www.fregate.com/>

PALM REPUBLIC

Palm Republic Rum, the rum brand co-founded by actor Eric Winter and spirits entrepreneur Brad Parkes, announced a significant expansion of its U.S. distribution footprint, marking the company’s next phase of growth across key markets nationwide. Beginning this summer, Palm Republic Rum will expand into eight new markets through a series of strategic distribution agreements, significantly increasing availability for both on- and off-premise accounts across the country. The brand will now be represented by Southern Glazers Wine & Spirits in California, Florida, and Texas, and expand into states including New York, Massachusetts, Nevada, and Colorado. In addition, the brand will launch in Georgia through Empire Distributors, Inc. and Pennsylvania through the Pennsylvania Liquor Control Board, with Southern Glazers Wine & Spirits as the brands broker in the state. “Palm Republic was created to celebrate premium rum and the moments that bring people together,” says Eric Winter, Co-Founder of Palm Republic Rum. “My connection to rum goes back nearly two decades to Puerto Rico with my wife, an experience that sparked a real appreciation for the spirit. Bringing that passion into the brand has been incredibly meaningful. As demand continues to grow, partnering with Southern Glazer’s Wine & Spirits marks a major milestone. Their scale, expertise, and relationships make them an ideal partner as we introduce Palm Republic to new markets nationwide.” <https://palmrepublicrum.com/>

ANNABAY CLUB

AnnaBay Club, the Curaçao-based rum producer and maker of The Rum of Curaçao, has won two Double Gold Medals at the 2026 San Francisco World Spirits Competition, organized by The Tasting Alliance. The results place Curaçao-made rum alongside some of the most celebrated spirits in the world and mark another proud moment for the island’s growing reputation for quality and craftsmanship. A

Double Gold Medal is awarded only when every judge on a tasting panel independently awards a spirit a Gold Medal in a blind tasting, making it one of the competition's highest distinctions. "This is a very proud moment for us," said Christian Branum, Rum Maker and Managing Director at AnnaBay Club. "From the beginning, our ambition has been to create a family of rums that Curaçao could proudly call its own, and that would help put the island on the map. To get this kind of international recognition shows we're well on our way. "Produced along the shores of the St. Anna Bay in Willemstad, AnnaBay Club's range of rums is inspired by the island's history, people, and lifestyle. The Curaçao Originals are made with an additive-free approach, letting the character of the rum and the influence of island maturation take center stage. <https://annabayclub.com/>

RENEGADE RUM DISTILLERY FOR SALE

One of the spirits industry's most influential figures has put his rum distillery in Grenada up for sale, four years after it was established. Mark Reynier became famous in the 2000's for reviving the fortunes of Islay's Bruichladdich whisky distillery and then selling it to Rémy Cointreau in 2012. Next, he Founded the Waterford Distillery in Ireland. Then he started work in 2020 on the Renegade Rum Distillery in Grenada. The project took a terroir-driven approach to making rum from sugarcane rather than molasses, sourcing cane from 12 neighboring farms and including a code on each bottle tracing it back to the exact farm, plot and harvest date.

Maria Daniel, Managing Partner at consultant EY Parthenon Caribbean, which is leading the sale, said "the sustainability and social impact angle add an extra dimension for prospective buyers. Across the spirits industry, sustainability happens at the margins: lighter packaging, cleaner inputs," she said. "The core imbalance stays the same: value sits downstream, while farmers capture only a fraction of it. Renegade was built to close that gap. Farm-to-bottle isn't a marketing line, it's a structural model: cane locally sourced and processed on site, by-products returned to the soil, an all-female, entirely neighborhood production team."

maria.daniel@parthenon.ey.com

REPUBLIC NATIONAL DISTRIBUTING COMPANY FILES FOR BANKRUPTCY

Republic National Distributing Company (RNDC), formerly the second-largest wine and spirits distributor in the United States, has filed for bankruptcy after a yearlong collapse. Late

last month, RNDC explained on their website: "For generations, Republic National Distributing Company (RNDC) has been proud to serve customers and suppliers across the United States. We are grateful for the partnerships we have built and the trust you have placed in us throughout our history. On July 26, 2026, RNDC initiated a voluntary chapter 11 process to explore potential sale transactions in court and implement an orderly wind down of our remaining operations. This decision was not made lightly. Over time, our industry has evolved, consumer preferences have shifted and the wholesale environment has grown increasingly challenging. Over the last several months, we have taken deliberate steps to transition our operations across certain markets. We pursued and closed sales that preserved over 5,000 jobs and allowed our businesses in those markets to continue serving their customers and suppliers. Ultimately, RNDC's financial position required us to pursue an in-court process."

The filing says RNDC has over 100,000 creditors, assets between \$500 million and \$1 billion, and liabilities between \$1 billion and \$10 billion, according to Wine & Spirits Daily, who reviewed the document.

RNDC's filing lists the 30 most substantial unsecured claims against the company, which total over \$300 million. The largest unsecured claim is a sum of \$93.92 million owed to Proximo Spirits, producer of brands like Jose Cuervo, for trade debt and litigation.

<https://www.rndc-usa.com/>

HOUSE OF RUM

Independent bottler, House of Rum, has unveiled its first single-cask Cuban expression, a 2010 rum from Ron Cubay Distillery. Known for its ultra-premium, single-vintage, single cask and cask strength rums, this latest bottling was distilled in a column still from Cuban molasses and barreled into an American white oak cask for five years in Cuba. In 2016, it was shipped to the UK where it was re-casked into an American Oak ex-bourbon barrel and continentally aged for an additional ten years and then bottled at 43% ABV. "We have listened to our loyal vintage cask customers who have told us they wanted something from us that is easy drinking, affordable and mixable and we are sure this fits that bill beautifully. This Cuban release affirms that we are steadily building a portfolio that has a rum for every drinking style, palate and pocket" said House of Rum founder David Howarth.

<https://house-of-rum.com/>

PAUL'S SPIRITED TRAVEL



Tales of the Cocktail 2026-A Tapestry of Rum



During the first half of 2026, the Tales of the Cocktail Foundation have been busy. After successfully completing "Tales on Tours" events in Chicago, Dallas, and Los Angeles, it was time for them to bring the 20th annual Tales of the Cocktail (TOTC) event home to New Orleans, Louisiana, July 19th through the 24th for a new year of spirited education, events, brand parties and awards. Reviewing the schedule, a noted difference from previous years was how these events were spread all over the city and surrounding areas, as some brands chose to have their offerings far outside the confines of the French Quarter. A great deal of planning and execution goes into this spirit festival not only by the organizers but by the attendees as well due to the sheer volume of events going

on at any given time that might appeal to a person's professional or personal interests.

It was during the planning stage that I began noticing a pattern with the events. The TOTC schedule was loaded with training, big-name whisky and tequila events, and plenty of gin, vodka, and no-lo events as well; however, this year the rum category was different. Instead of it being a scavenger hunt or a game of hide-and-seek, rum related events were woven into the tapestry of what would become the 2026 Tales experience. I quickly realized that I could not do everything but would be curious to see what I could accomplish during the week. The remnants of Tropical Storm Bertha provided a surprising twist to the weather for what would become one of the most engaging Tales of the Cocktail experiences I have had in years.

I arrived in New Orleans on Sunday and checked into the Bienville Hotel. Normally my first day helps me settle in and familiarize myself with changes around the French Quarter, and I quickly discovered a high number of road and sidewalk closures that would add some interesting twists



to navigating the area during the week. After completing registration, I visited the Historic New Orleans Collection Museum and appreciated viewing the many works of art and artifacts on display. Afterwards, it was time to celebrate the conclusion of the World Cup as I visited three different finale parties at the Omni Hotel, House of Blues, and Chart Room, reconnecting with old friends and meeting new people as Spain finally won the match. Circle Hook Rum held a happy hour at the Revel Cafe and Bar.

On Monday, the conference began with a full day of seminars and events ranging from whisky tastings, witnessing rum competition judging, and experiencing a variety of new spirits in the morning. The afternoon kicked off with the Appleton **Rum and Riddim** event, showcasing drinks made by Three Dots and a Dash and the Porco Lounge and music providing the soundtrack for the venue. A room was devoted to the Joy Spence Table tasting experience, where participants were able to try four or five different Appleton expressions. Down the street, the Sazerac House held the **Rhum St James cocktail competition** on the first floor as well as limited tasting events



upstairs in the museum area that included a Caroni rum in one of the line ups. The afternoon concluded with a viewing of the **Donn of Tiki movie** with questions and answers by Jeff "Beachbum" Berry and a happy hour at the Double Club sponsored by Mount Gay Rum with cocktails from Marie King, Beverage Director of Don the Beachcomber; Ryan Jones, Lead Bartender of Morgan's Cove; and Erica Luera, Bartender of Strongwater Anaheim. Meanwhile at the Absinthe House the **Aussie Open House** served Bittertales Rum Old Fashioned and Seven Hill Sours to the enjoyment of patrons. That night Jack Daniels presented The All American Rejects and Diageo held their House of Whisky event at the House of Blues while

Sazerac threw a midnight party into the early hours of Tuesday.

The morning began with a spirited brunch at the Ritz Carlton Hotel, celebrating the winners of the New Orleans Spirit Competition, where the Distiller's Reserve Rum by Circle Hook Distilling won the best rum/cane spirit of the year. BCI Bonnette provided a Rhum masterclass about the history of Martinique Rhums and specifically the Rhum Dillon and Rhum Depaz brands led by Daniele dalla Polla, Myssi Davis and Joe Horstkamp of the Rum Travelers, and Global Rum Ambassador, Ian Burrell. Back at the Ritz, Zan Kong and Craig Nicholson of Worthy Park Estate, and Shaun Caleb, the Master Distiller of Demerara Distillers Limited, presented a seminar entitled **Dunder and Demerara** that discussed their production methods and provided a competitive blending experience for the participants. **Molecules of Maturity** with David Morrison, Deputy

Master Blend of Appleton Rum as well as Benny Horwitz of Campari and Sullivan Doh of D'usse shared the chemistry of aging bourbon, cognac, and rum.

Indie Spirits Expo presented new and familiar spirits from around the globe for participants. PM Spirits presented an array of rums from Hampden, La Maison Vellier, and many others for the event. Meanwhile, at the same time on the other side of the French Quarter at the Negril Cafe, Ian Burrell taught a **Jamaican Rum Master Class** and introduced the new incarnation of Crossfire Hurricane to participants. At the Four Seasons, Ron Zacapa hosted a happy hour event.

That evening Don Q Rum hosted the **Redefining the Knight** dinner, where participants explored their two new expressions during a unique dining experience. William Grant and Sons presented their annual party, and for the rum curious, Altamar Brands hosted



the **Dog and Pony Show** experience at Junebug introducing the new Probitas Green Label Rum. Sidecar Patio and Oyster Bar hosted the Les Verges Boiron **Miami Block party** with rums from El Dorado and spirits from Heaven Hill featuring cocktails by Julio Cabrera of Cafe La Trova, Christian Delpech of Presidente Bar, and Shauna O'Neal formally of Sweet Liberty. To conclude the evening of rum related events Sazerac House hosted the **Last Call: Fangs Out 80's Takeover** at the Sea Cove Arcade featuring cocktails made with Rhum St. James and Cutty Sark.

On Wednesday, the wind and rain from the remnants of Tropical Storm Bertha began drifting in, which guaranteed everyone got wet from the rain or the heat throughout the day. The morning was a whirlwind of different tasting experiences, seminars, and offsite events. Maison Ferrand and Panday Liqueur showcased what the new spirit brand could do when paired with different spirits. Diplomatico served a variety of cocktails across town over multiple days with Cafe Diplomatico. PM spirits hosted visitors for private tastings, then things got busy. Don Q hosted the **Carnivale Redeaux** with cocktails by La Factoria at Brennan's that concluded with a second line in honor of friends of the brand that had departed. At The Will and the Way, Worthy Park Estate and Crossfire Hurricane hosted **Dancehall and Daiquiris 2.0** for some lively entertainment. Sailor Jerry Spiced Rum took over the Chart Room with a **Flash and Rum** cocktail event that did not disappoint fans of the brand. Meanwhile, at the Hard Rock Cafe, Myers's Rum hosted a **Rock the Mai Tai** event using historic cocktail recipes, creating flavorful, well-balanced cocktails. Events continued well into the night at the Diageo House of Agave, Ford's Gin, Redemption Whisky, and Jameson providing the evening's festivities with Maison Ferrand and Planteray Rum hosting its annual **A Toast to Rocky** event at midnight at Bar Tonique.

As the sun rose on New Orleans Thursday morning, winds and rain from Bertha were still drifting through the French Quarter. The annual Meet the Distillers sessions

had a surprisingly small representation this year of diverse brands and spirits. There were two seminars of interest for those who study rum or sugarcane related products: **Holy Spirit: The Spiritual Love of Clairin and Agave**, and El Dorado Rum and Demerara Distillers had a tasting room with a seminar room where Master Distiller Shaun Caleb presented **Tales of the Wooden Pot Still**. Where he discussed how the company used the Port Marrant Double Wooden Pot Still, and participants were allowed to try still proof distillate, aged and cask strength, the Port Marrant 21, and concluded with the PM/DHE High Ester Blend. Kraken Rum held their **Skate and Shop** event at Humidity Skate Shop that celebrated the brand's partnership with the X Games. One of the last major rum events of Tales of the Cocktail was the **Planteray Pool Club: Northern Exposure**. Featuring cocktails from Montreal's Atwater Cocktail Club and Portland's Room for Improvement. The 4th annual Anti-Cocktail party was sponsored by Spiribam, Saint Benevolence and Worthy Park Estate.

Throughout the week there were over 25 rum related events with over 30 brands represented in varying capacities. From elegant to outrageous, rum brands presented the spirit in its full spectrum of flavorful cocktails and neat sips that were consumed and showcased the diversity and differences that rum had to offer. The theme of Tales of the Cocktail this year was "Spark", celebrating inspiration, actions and human connections that create meaningful progress and changes across the global drinks industry. The 2026 Tales of the Cocktail experience had the most rum programming that we have seen at an annual conference, and it is hoped that this will continue into future events. Collectively, the rum related tasting events, seminars, and dining experiences captured and shared the "Spark of inspiration" theme better than anyone imagined.

Hopefully we will see this trend of rum programming continue into 2027.



The Sweet Business of Sugar

THE Rum
UNIVERSITY



Brazil

Regardless of distillation equipment, fermentation method, aging or blending techniques, all rum producers have one thing in common: **sugarcane**.

Without sugarcane we would not have sugar mills, countless farmers would not have a profitable crop and we would not have rum!

Required Report: Required - Public Distribution

Date: April 20, 2026

Report Number: BR2026-0020

Report Name: Sugar Annual

Country: Brazil

Post: Brasilia

Report Category: Sugar

Prepared By: Thiemi Hayashi

Approved By: Frederick Giles

Report Highlights:

Brazil remains the world's largest sugarcane and sugar producer. Despite higher sugarcane production forecast for MY2026/27, the harvest is expected to favor ethanol over sugar production, reducing sugar output and exports. This shift is directly linked to domestic gasoline prices, since higher gasoline prices make ethanol more profitable relative to sugar, changing the production mix accordingly. Brazil is the second-largest recipient of the U.S. sugar tariff-rate quota, representing approximately 14 percent of the total TRQ, and has consistently met its allocation in recent years. On January 17, 2026, the EU and Mercosur signed an agreement granting Mercosur exporters duty-free access for 180,000 metric tons of raw cane sugar for refining. The EU-Mercosur quotas to be assigned to Brazil will be allocated exclusively to North-Northeastern sugar producers, consistent with the allocation methodology for U.S. sugar TRQs and in accordance with specific federal legislation.

Sugarcane Production

Sugar Cane for Centrifugal Market Year Begins Brazil	2024/2025		2025/2026		2026/2027	
	Apr 2024		Apr 2025		Apr 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	9600	0	0	9850	0	9950
Area Harvested (1000 HA)	9400	0	0	9700	0	9800
Production (1000 MT)	645000	0	0	660000	0	675000
Total Supply (1000 MT)	645000	0	0	660000	0	675000
Utilization for Sugar (1000 MT)	316050	0	0	326700	0	324000
Utilizatn for Alcohol (1000 MT)	328950	0	0	333300	0	351000
Total Utilization (1000 MT)	645000	0	0	660000	0	675000
(1000 HA) ,(1000 MT)						

Brazil continues to maintain its position as the world's largest producer of sugarcane and sugar. Total sugarcane production for marketing year 2026/27 (April–March) is forecast at 675 million metric tons (MMT). Production in the Center-South region (CS) is projected at 620 MMT, while the North-Northeast region (NNE) is expected to produce 55 MMT.

Sugarcane production for MY2026/27 is projected to increase by approximately two percent compared to MY2025/26 (660 MMT) due to improved climatic conditions that favored the development of sugarcane fields and, consequently, increased agricultural productivity.

Throughout 2025, the CS sugarcane-growing regions recorded rainfall volumes within normal ranges, which resulted in the recovery of sugarcane fields affected by the drought and excessive heat recorded in 2024, leading to accelerated biomass gains. Consequently, the sugarcane harvest in the first three months of MY2026/27 (first third of the harvest) is expected to register slightly higher levels of tons of cane per hectare (TCH) and higher levels of Total Recoverable Sugars (TRS) compared to the previous harvest.

Unlike recent harvests, sugarcane crushing is projected to be more heavily directed toward ethanol production, thereby reducing the sugar production mix, which is estimated at 48 percent for sugar and 52 percent for ethanol in MY2026/27. The 2025/26 harvest had a mix of 49.5 percent for sugar and 50.5 percent for ethanol.

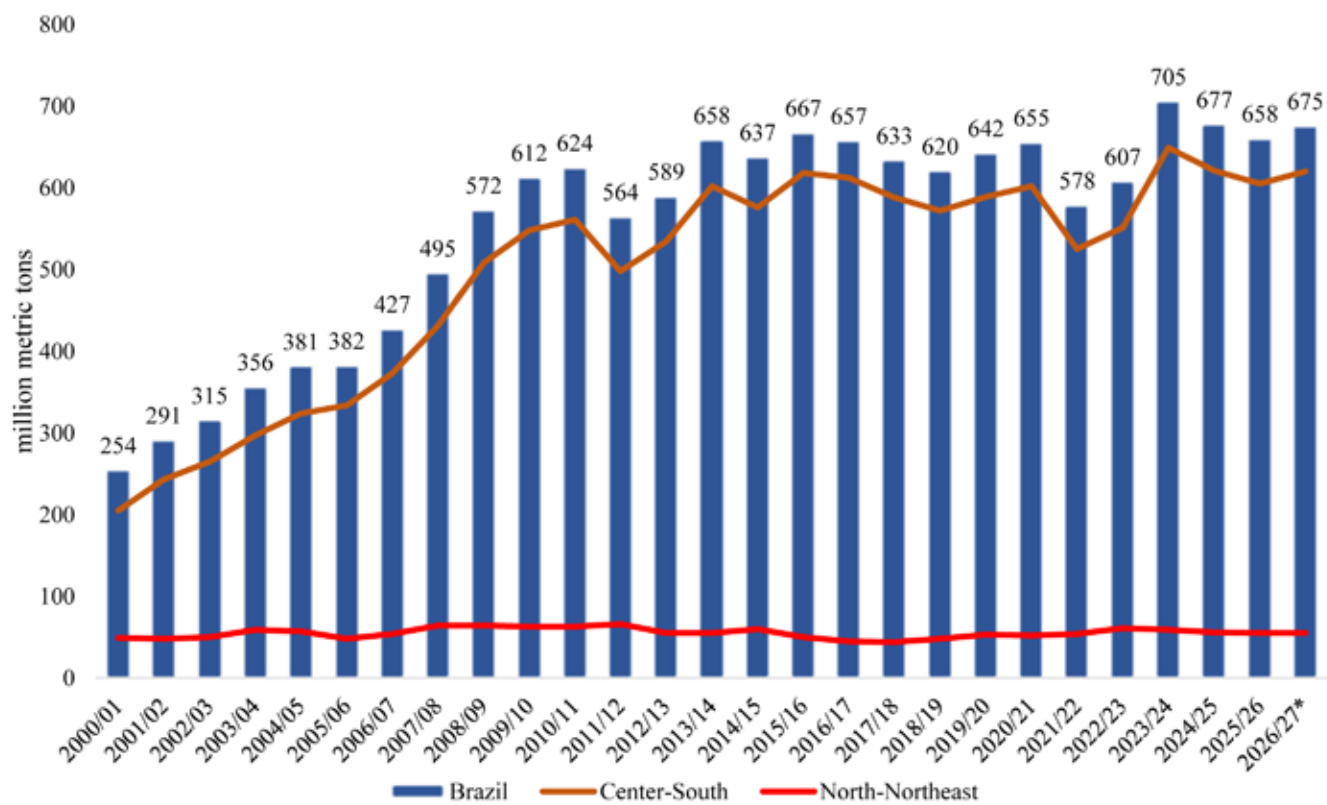
Strong domestic ethanol demand drives the shift in the sugar-ethanol mix. The anhydrous ethanol blend in gasoline increased from 27 percent (E27) to 30 percent (E30) in August 2025, while hydrous ethanol offers producers better domestic prices and profitability than sugar. Falling international sugar prices reinforce this trend.

April and May 2026 rainfall will determine the second-semester sugarcane harvest trajectory, though agricultural and industrial productivity indexes should remain near MY2025/26 levels.

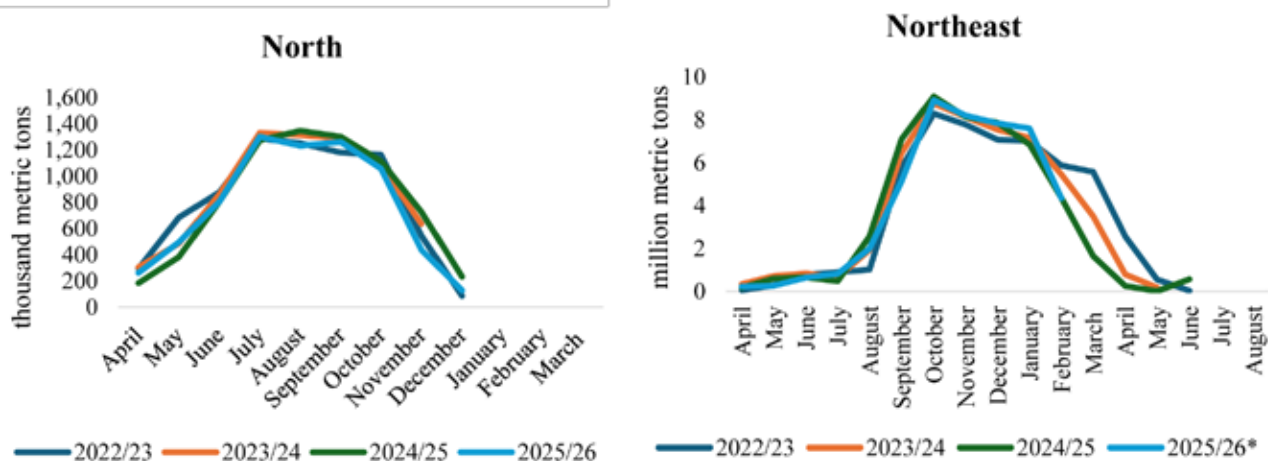
In the North-Northeast (NNE), climatic conditions were unfavorable for sugarcane field development, as the main producing regions registered lower rainfall volumes in 2025. As a result, MY2026/27 crushing is expected to remain at approximately 55 million metric tons, the same quantity recorded in MY2025/26. In Alagoas, production is expected to remain close to MY2025/26 levels, supported by increased crushing and productivity. In Pernambuco, production is projected to grow due to expanded harvested area. In Paraíba, TRS is estimated to remain within the historical average, with a slight increase in production despite a reduction in harvested area.

In the Center-South, the crop season extends from April through March, and the MY2026/27 harvest in the region officially began on April 1. The North-Northeast crushing season runs from September through August.

Figure 1
Brazilian Sugarcane Production, MY 2000/01 to MY2026/27 (million metric tons)



Source: Ministry of Agriculture and Livestock (MAPA), Chart FAS Brasília. *Forecast. MY2025/26 as of March 16, 2026.

Figure 2*Sugarcane Crushed in the Center-South (million metric tons)**Source: Ministry of Agriculture, Chart FAS Brasilia *As of March 16, 2026***Figure 3***Sugarcane Crushed in the North-Northeast**Source: Ministry of Agriculture; Chart FAS Brasilia *Refers to April to February*

According to the Ministry of Agriculture and Livestock (MAPA), Brazil produced 658 MMT of sugarcane on 8.9 million hectares in MY2025/26, with data until March 16, 2026. São Paulo was the largest producing state, accounting for 52 percent of production (343 MMT), followed by Goiás with 12 percent (77 MMT), and Minas Gerais with 11 percent (73 MMT). In the North-Northeast region, Alagoas was the largest producing state, accounting for 2.5 percent of national production (17 MMT), followed by Pernambuco with 2 percent (12 MMT).

Figure 4
Sugarcane Producing States in MY2025/26, in metric tons*



Source: Ministry of Agriculture; Chart FAS Brasília. * As of March 16, 2026

Area Planted with Sugarcane

Post forecasts total area planted with sugarcane in MY2026/27 at 9.95 million hectares (mi/ha), slightly higher than the 9.85 mi/ha planted in the previous year. The increase in area is primarily due to sugarcane field renewal. However, renewal in this harvest will be limited, as producers report that renewal costs are high and sugarcane fields are relatively young due to more extensive renewals in previous harvests, such as in MY2021/22, when the sugarcane crop was damaged by drought.

Despite the trend in previous years of marginal migration from sugarcane to grain cultivation, experts report that profit margins from grain production have not been sufficient to expand this migration.

Post forecasts total sugarcane harvest area at 9.1 million hectares in MY2026/27.

Table 1*Area Harvested to Sugarcane (thousand hectares)*

	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27*
SP	4,588	4,491	4,266	4,279	4,413	4,425	4,440
CS	7,854	7,694	7,453	7,518	7,819	8,013	8,125
NNE	895	892	937	885	947	961	975
Brazil	8,749	8,587	8,391	8,402	8,766	8,975	9,100

Source: National Supply Company (CONAB); Chart FAS Brasilia *Forecast. NOTE: Consider SP (São Paulo); CS (Center-South); NNE (North-Northeast).

Agricultural and Industrial Yields

In MY2026/27, Post forecasts Brazil's average sugarcane agricultural yield at 77,300 kilograms per hectare (kg/ha), a slight increase compared to the previous crushing season (76,100 kg/ha). The average yield in the Center-South region is forecast at 78,300 kg/ha, while the average yield in the North-Northeast is projected at 61,900 kg/ha.

Agricultural yield refers to the amount of sugarcane harvested per unit of area. The difference between both regions is primarily due to the higher use of machinery and technological inputs in the Center-South. Other factors that influence agricultural productivity include planting methods, plant variety, irrigation, presence of diseases and pests, and climatic conditions. Harvest mechanization in the Northeast region is estimated at approximately 27 percent due to irregular terrain. In the Center-South, approximately 99 percent of sugarcane harvest is mechanized.

Table 2*Sugarcane Agricultural Yields (kilogram per hectare – kg/ha)*

	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*	2026/27**
SP	75,207	79,636	79,719	71,604	75,436	93,715	80,112	77,800	78,600
CS	74,323	78,107	78,048	71,416	74,643	88,192	79,107	77,500	78,300
NNE	54,021	59,381	58,006	61,541	65,765	64,833	61,665	61,800	61,900
Brazil	72,234	76,133	75,965	70,357	73,655	85,580	77,223	76,100	77,300

Source: National Supply Company (CONAB); Chart FAS Brasilia *Estimate; as of April 13, CONAB has not updated the agricultural yields results for the MY2025/26. **Forecast. NOTE: Consider SP (São Paulo); CS (Center-South); NNE (North-Northeast).

Brazil's average industrial yield in MY2026/27 is forecast at 138.2 kilograms of total recoverable sugar per metric ton (kg TRS/MT), assuming normal weather conditions throughout the crushing period. Industrial yield refers to the amount of sugar produced per unit of cane harvested.

Table 3

Sugarcane Industrial Yields (kilogram per total recoverable sugar/metric ton - kg TRS/MT)

	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*	2026/27**
SP	138.41	138.41	146.85	143.8	140.49	137.94	139.1	139.4	139.5
CS	140.23	138.61	144.62	142.88	140.78	138.85	137.7	138.1	138.3
NNE	134.52	135.86	130.97	127.23	125.02	127.09	133.3	132	132
Brazil	139.82	138.38	143.53	141.42	139.18	137.9	137.4	138	138.2

Source: National Supply Company (CONAB); Chart FAS Brasilia *Estimate; as of April 13, CONAB has not updated the industrial yields results for MY2025/26. **Forecast. NOTE: Consider SP (São Paulo); CS (Center-South); NNE (North-Northeast).

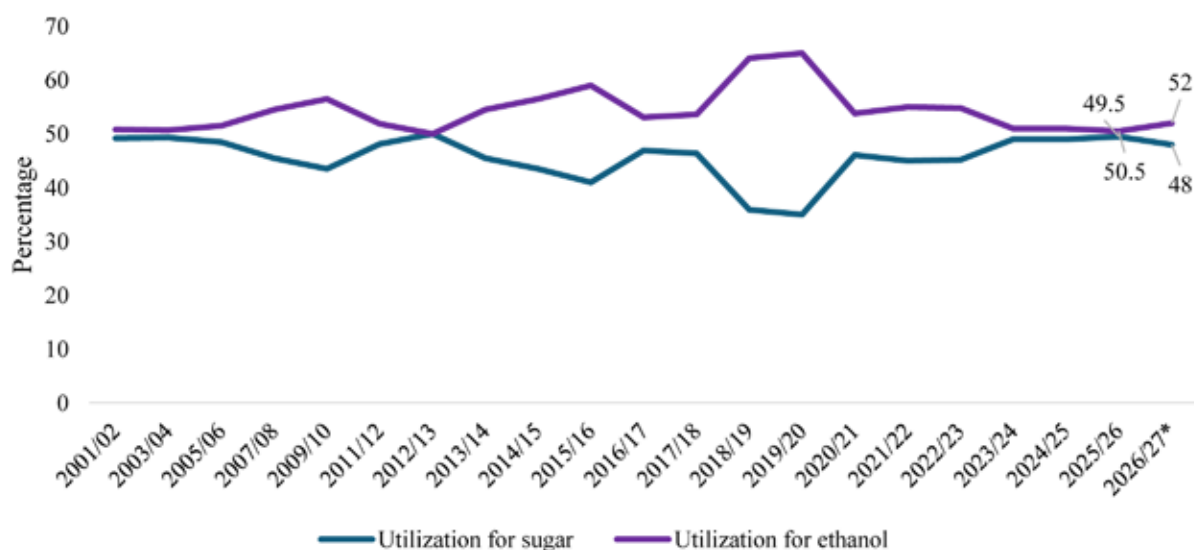
Sugar and Ethanol Production Mix

The MY2026/27 sugar/ethanol production mix is estimated at 48 percent sugar and 52 percent ethanol. Declining international sugar prices and more attractive ethanol prices, driven by increased domestic demand for both anhydrous and hydrous ethanol, have progressively shifted the production mix from sugar predominance toward ethanol.

Mills prioritized ethanol production as early as the final quarter of MY2025/26, and the harvest is expected to close at 49.5 percent sugar and 50.5 percent ethanol.

Figure 5

Sugarcane Breakdown – Sugar/Ethanol Production Mix



Source: National Supply Company (CONAB) and Industry Sources; Chart Post Brasilia *Forecast

Sugarcane Prices in the Domestic Market

For marketing year 2026/27, the Center for Advanced Studies in Applied Economics (Cepea) calculates and publishes prices for total recoverable sugar per kilogram (TRS), the standard used to compensate sugarcane suppliers. Cepea bases its TRS calculation on market prices it collects, the methodology established by the Council of Sugarcane, Sugar and Ethanol Producers of the State of São Paulo (Consecana-SP), and the weighted production and commercialization mix from the previous three harvests. Through March 2026, Cepea reported the average sugarcane price for São Paulo state at BRL 1.0816 per kilogram of TRS, equivalent to approximately BRL 149 per metric ton of sugarcane.

The Brazilian Sugarcane and Bioenergy Industry Association (Unica) and the Organization of Sugarcane Producers Associations of Brazil (Orplana) signed a Memorandum of Understanding on April 3, 2026, addressing Consecana-SP, the primary sugarcane pricing reference in São Paulo state. The agreement covers two main areas: implementing a technical and economic review of the pricing model based on studies conducted by the Fundação Getulio Vargas agribusiness center (FGV Agro) and modernizing Consecana-SP's governance structure. A formal signing ceremony is scheduled for April 15-16, 2026.

The agreement follows extended negotiations between industry and producers over pricing methodology. Established in 1999, the Consecana-SP model requires participation from both the sugar-energy industry (represented by Unica) and producers (through Orplana) to determine pricing based on product values and total recoverable sugar (ATR) conversion. Consecana's internal regulations call for updates every five years to revise technical and economic criteria for cane commercialization. The two organizations contracted FGV Agro in July 2024 to conduct a methodological review. Unica reported the study was delivered in January 2025, while Orplana indicated that additional details were clarified in April 2025. In November 2025, Unica signed a separate memorandum with three producer associations; Orplana subsequently expressed concerns about parallel decision-making processes.

The extended negotiations had operational implications. In 2023, producers noted that prices had not been updated for over five years, and some considered shifting to alternative crops. Throughout 2024 and 2025, the lack of agreement affected publication of monthly price circulars. Market analysts observed that this created uncertainty about contracts throughout the supply chain. The new memorandum establishes a framework for updating technical criteria and defining representation between industry and producers in sector decisions, though specific implementation details were not disclosed.

Table 4*Average Prices per Kilogram of TRS, in Brazilian Reais per Kilogram (BRL/kg)*

Month	Average Price of TRS per Kilo	
	Month	Accumulate
Apr/2025	1.2294	1.2294
May/2025	1.1917	1.2057
Jun/2025	1.1177	1.1710
Jul/2025	1.0804	1.1441
Aug/2025	1.0727	1.1267
Sep/2025	1.0624	1.1128
Oct/2025	1.0500	1.1041
Nov/2025	1.0515	1.0985
Dec/2025	1.0587	1.0952
Jan/2026	1.0567	1.0929
Feb/2026	1.0228	1.0886
Mar/2026	1.0007	1.0816

Source: Center for Advanced Studies in Applied Economics (Cepea); Chart FAS Brasilia.

This report maintains prices in Brazilian Reais to avoid conversion losses. The table below presents the official exchange rate relative to the U.S. dollar.

Table 5*Exchange Rate (BRL/USD 1.2 – official rate, last day of period)*

Month	2018	2019	2020	2021	2022	2023	2024	2025	2026
January	3.16	3.65	4.25	5.48	5.36	5.10	4.95	5.83	5.22
February	3.24	3.74	4.50	5.53	5.14	5.21	4.98	5.84	5.14
March	3.32	3.90	5.20	5.70	4.74	5.08	4.99	5.74	5.21
April	3.48	3.94	5.43	5.40	4.92	5.00	5.17	5.60	5.11*
May	3.74	3.94	5.43	5.23	4.73	5.09	5.24	5.70	
June	3.86	3.83	5.48	5.00	5.24	4.82	5.55	5.45	
July	3.75	3.76	5.20	5.12	5.19	4.74	5.66	5.6	
August	4.14	4.14	5.47	5.14	5.18	4.92	5.65	5.42	
September	4.00	4.16	5.64	5.44	5.41	5.00	5.44	5.34	
October	3.72	4.00	5.77	5.64	5.26	5.05	5.77	5.38	
November	3.86	4.22	5.33	5.62	5.29	4.93	6.05	5.33	
December	3.87	4.03	5.20	5.58	5.78	4.84	6.19	5.5	

*Source: Brazilian Central Bank; Chart FAS Brasilia. *As of April 13, 2026*

Cane Sugar Production

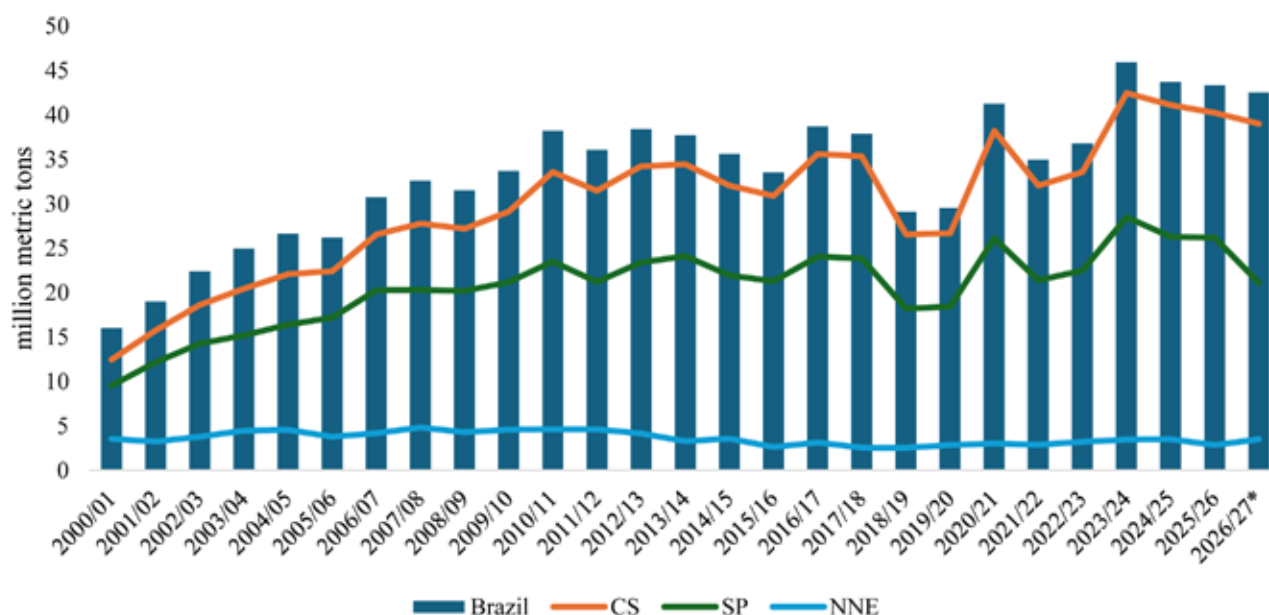
Sugar, Centrifugal Market Year Begins Brazil	2024/2025		2025/2026		2026/2027	
	Apr 2024		Apr 2025		Apr 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	760	760	570	570	0	321
Beet Sugar Production (1000 MT)	0	0	0	0	0	0
Cane Sugar Production (1000 MT)	43700	43700	44386	43800	0	42500
Total Sugar Production (1000 MT)	43700	43700	44386	43800	0	42500
Raw Imports (1000 MT)	0	0	0	0	0	0
Refined Imp.(Raw Val) (1000 MT)	0	0	0	0	0	0
Total Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	44460	44460	44956	44370	0	42821
Raw Exports (1000 MT)	30570	30570	31500	29940	0	29500
Refined Exp.(Raw Val) (1000 MT)	4320	4320	4200	4161	0	4100
Total Exports (1000 MT)	34890	34890	35700	34101	0	33600
Human Dom. Consumption (1000 MT)	9000	9000	9000	9948	0	9000
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	9000	9000	9000	9948	0	9000
Ending Stocks (1000 MT)	570	570	256	321	0	221
Total Distribution (1000 MT)	44460	44460	44956	44370	0	42821

Post forecasts total cane sugar production for MY2026/27 at 42.5 million metric tons (MMT), raw value, a reduction of three percent compared to MY2025/26 (43.8 MMT, raw value). The Center-South region is expected to produce 39 MMT, an approximately 3 percent reduction compared to the 40.6 MMT estimated for MY2025/26. The North-Northeast cane sugar production is forecast at 3.5 MMT, a slight increase compared to MY2025/26 (3.2 MMT).

Despite the forecast for higher sugarcane production compared to the previous year, the MY2026/27 harvest is expected to favor ethanol production, resulting in reduced sugar production, which is also expected to affect exports.

Figure 6

Brazilian Cane Sugar Production, in million metric tons, raw value



Source: Ministry of Agriculture; Chart FAS Brasilia. *Forecast

According to the Ministry of Agriculture and Livestock (MAPA), total sugar production in MY2025/26 was 43.3 MMT (raw value) from April 1, 2025, to March 16, 2026. The Center-South region produced 40.2 MMT of sugar, or approximately 93 percent of Brazil's total production. The North-Northeast produced 3 MMT. São Paulo was the largest sugar producer, accounting for 60 percent of the total (26.1 MMT).

Table 6

Brazilian Sugar Production per Type, in thousand tons

	VHP		Demerara		Cristallization 0 to 180		Others	
	2024/25	2025/26*	2024/25	2025/26*	2024/25	2025/26*	2024/25	2025/26*
SP	19,344	19,599	27.6	29.1	6,147	6,033	477	503.5
CS	28,932	29,203	30.6	29.1	9,744	9,617	1,313	1,370.0
NNE	1,722	1,182.0	133.9	115.7	872.8	794.8	994.1	982.2
Brazil	30,654	30,385	164.5	144.8	10,617	10,412	2,307	2,352.2

Source: Ministry of Agriculture and Livestock (MAPA) *As of March 16, 2026. NOTE: Others include Amorphous Refined Sugar, Granulated Refined Sugar, High Test Molasses, Crystallization 181 to 300, and Organic.

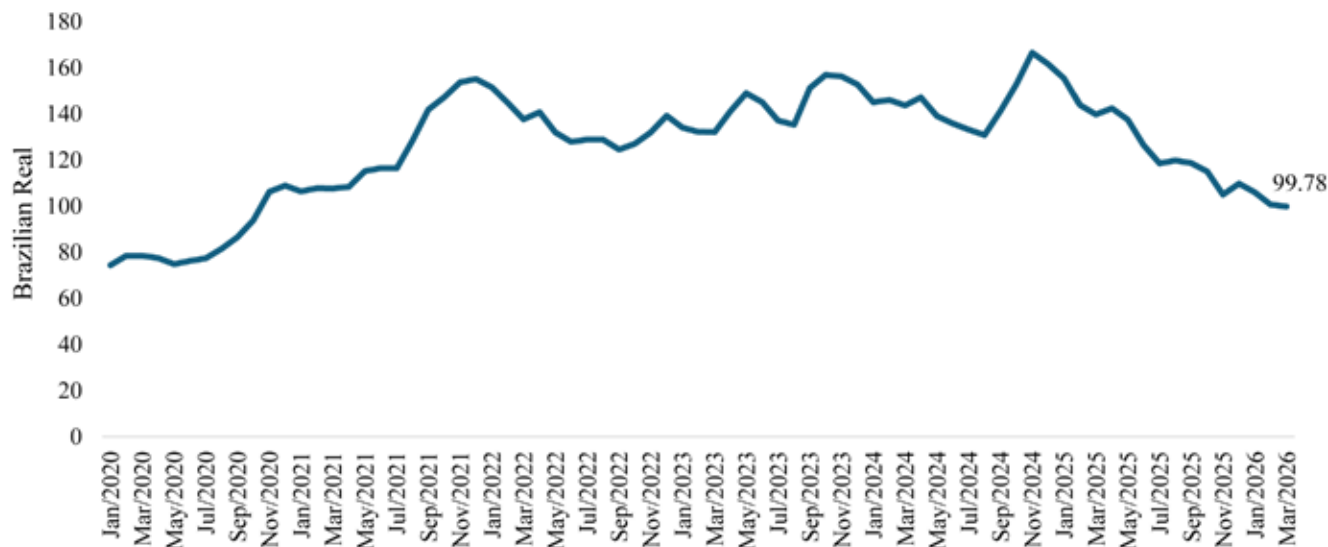
Sugar Prices in the Domestic Market

The Center for Advanced Studies in Applied Economics (Cepea) tracks crystal sugar prices received by producers in the domestic spot market. From April 2025 to March 2026, the Cepea Crystal Sugar Index,

São Paulo reference, averaged BRL 116.90 per 50-kilogram bag (kg/bag), a reduction of 19.5 percent compared to the same period of MY2024/25, which averaged BRL 145.28 per 50 kg/bag.

Figure 7

Monthly Average Crystal Sugar Price Index - São Paulo Reference, Brazilian Real (BRL), 50kg/bag, including tax



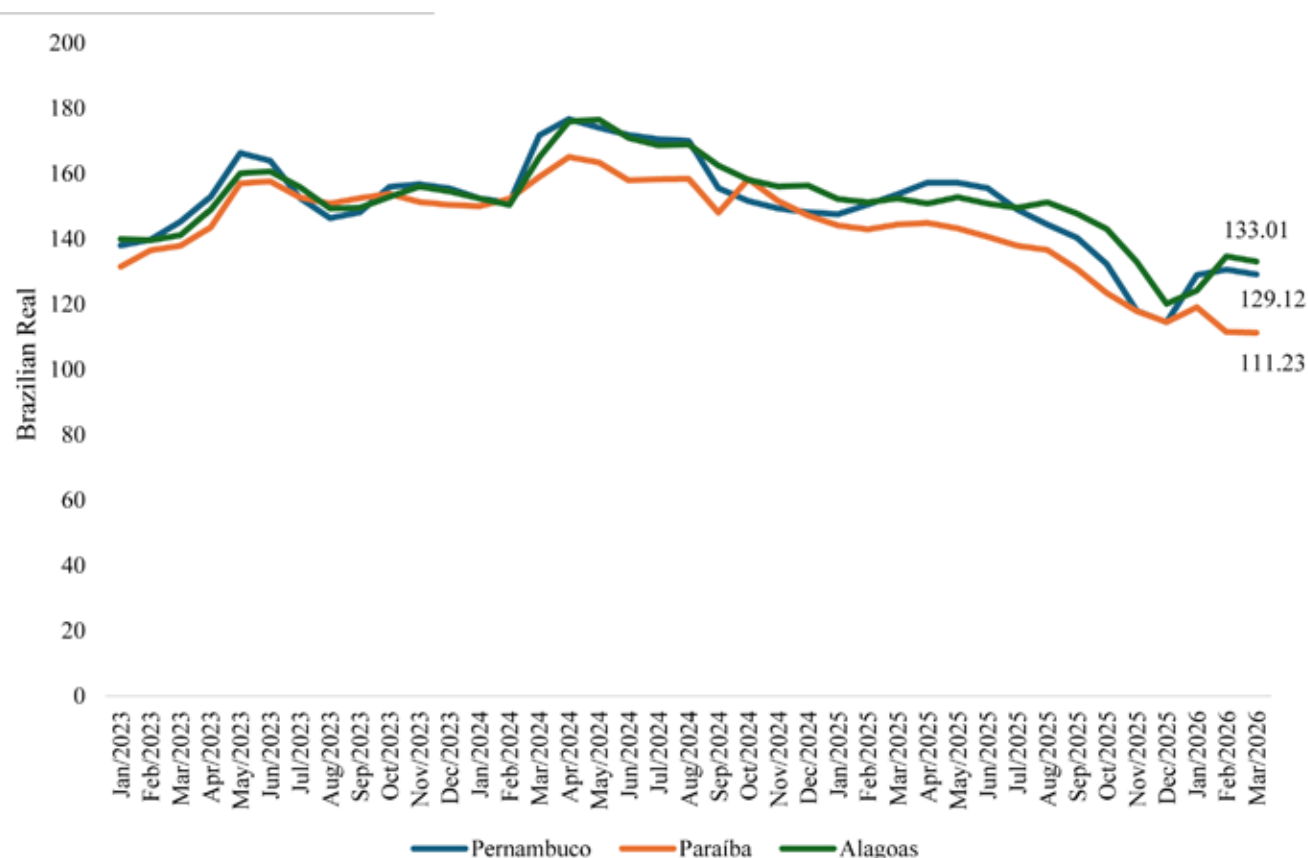
Source: Center for Advanced Studies in Applied Economics (Cepea); Chart FAS Brasilia. NOTE: The index refers to Icumsa from 130 to 180

Contrary to expectations of elevated prices due to global scarcity, Brazil's sugar prices declined throughout 2025. Despite low prices, sugar availability remained limited, particularly for higher-quality sugar, which was partially directed toward exports. Domestic prices in April 2025 registered an average of BRL 142.34 per 50-kilogram bag at the start of MY2025/26 crushing period but progressively declined to BRL 99.78 per 50-kilogram bag in March 2026, the lowest nominal value since October 2020.

Throughout MY2025/26 in the North-Northeast, sugar availability was constrained as mills concentrated on producing high polarization (VHP) sugar. Beginning in October, North-Northeast prices weakened further amid low spot market liquidity. Mills generally maintained limited supply while buyers adopted a cautious stance. Traded volume increased in December 2025. According to Cepea, in March 2026, the market experienced low liquidity and limited supply, characteristic of the off-season. Throughout the month, trading remained sporadic with reduced volumes, and available sugar was concentrated among a few mills since others had depleted their stocks. Prices declined slightly, driven down by weak demand.

Figure 8

Monthly Average Crystal Sugar Price Index – Pernambuco, Paraíba and Alagoas Reference, Brazilian Real (BRL), 50kg/bag, including tax



Source: Center for Advanced Studies in Applied Economics (Cepea); Chart FAS Brasília. NOTE: The index refers to Icumsa from 130 to 180

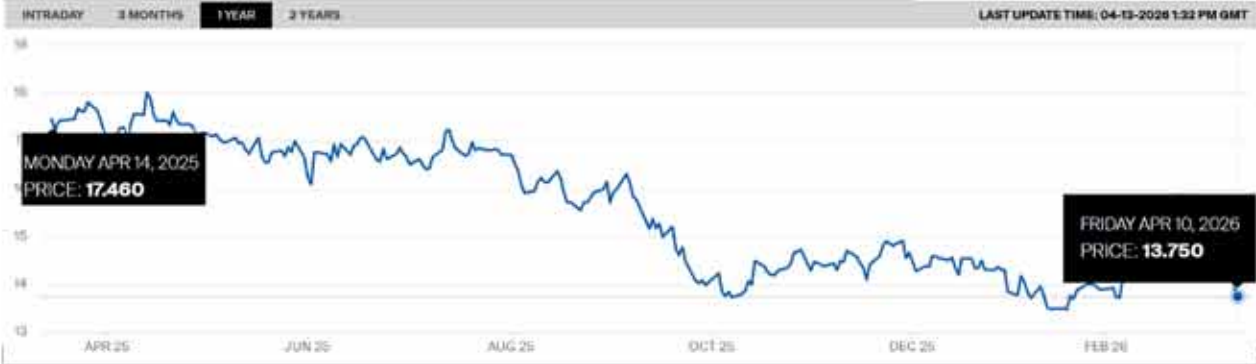
Sugar Prices in the International Market

International sugar prices for MY2025/26 (October-September) are trending downward. In the first quarter of 2026, prices frequently traded near or below 15-16 cents per pound, representing a substantial decrease from 2023 peaks. According to specialists, international sugar prices fell throughout 2025 as the global balance transitioned from deficit to surplus while funds built a large net short position in the market. Many mills fixed future contracts well in advance in 2024, when prices and exchange rates were more attractive. The downward pressure is primarily driven by sharp production rebounds from major exporters, including India, Thailand, and Brazil.

The world raw sugar price is represented by the nearby futures contract listed by the Intercontinental Exchange (ICE), commonly referred to as the Number 11 contract (Sugar #11). The world refined sugar price is measured by nearby futures contract settlement prices on ICE, often referred to as the Number 5 contract (Sugar #5). Refined prices exceed raw sugar prices, reflecting the costs of refining and storing sugar to higher polarity for human consumption.

Raw sugar futures trading in ICE Number 11 contracts for May 2026 were priced at 13.7 cents per pound on April 13, 2026.

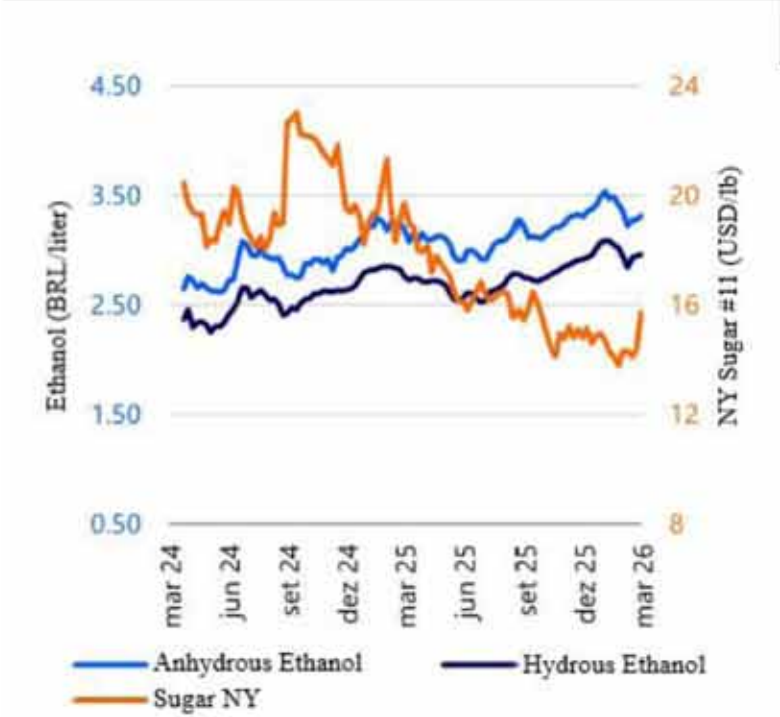
Figure 9
Sugar #11 Prices, USD c/lb, for May 2026 Contracts



Data and Chart Sources: Intercontinental Exchange (ICE); as of April 13, 2026.

According to specialists, international sugar prices began declining in June 2025 due to recovering global production. The Brazilian real’s depreciation against the dollar, which also intensified during this period, further affected returns. Sugar prices converted to Brazilian reais compensated only 11 percent more than hydrous ethanol sales prices. By the first quarter of 2026, hydrous ethanol compensated producers on average 20 percent more than sugar.

Figure 10
Sugar and Ethanol Prices – March 2024 to March 2026



Data and Chart Source: Rabobank and Bloomberg

Industry specialists emphasize the direct link between domestic gasoline prices and sugar market dynamics. Higher consumer gasoline prices strengthen ethanol sales prices, improving ethanol's profitability relative to sugar and shifting the production mix accordingly. Additional increases in the mandatory anhydrous ethanol blend mandate, designed to reduce gasoline import dependence, would further support ethanol prices by constraining hydrous ethanol supply in the domestic market.

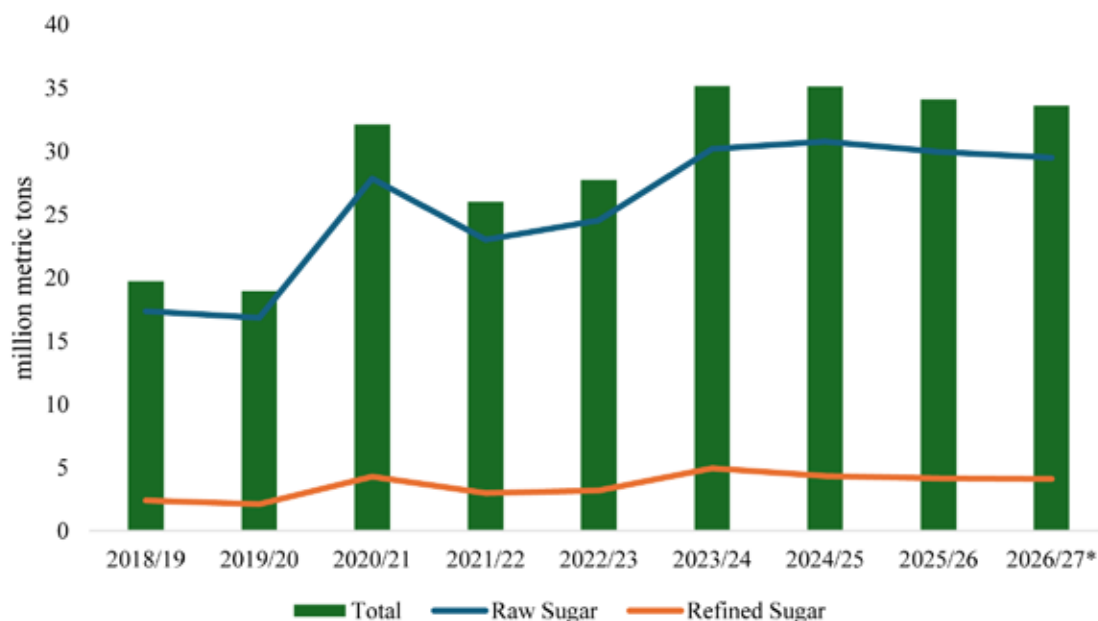
On April 8, 2026, the Minister of Mines and Energy announced that the government has initiated studies to increase the ethanol blend in gasoline from the current 30 percent to 32 percent during the first half of 2026. This increase could trigger further production adjustments and intensify the shift toward ethanol production, thereby reducing sugar output.

Trade

Post forecasts Brazilian sugar exports for MY2026/27 at 33.6 MMT (raw value). Post estimates reduced exports in MY2026/27 due to lower sugar availability resulting from the production mix shift toward ethanol. Brazil is projected to export approximately 29.5 MMT of raw sugar and 4.1 MMT of refined sugar.

Figure 11

Brazilian Sugar Exports – Raw and Refined Sugar, in million metric tons tel quel



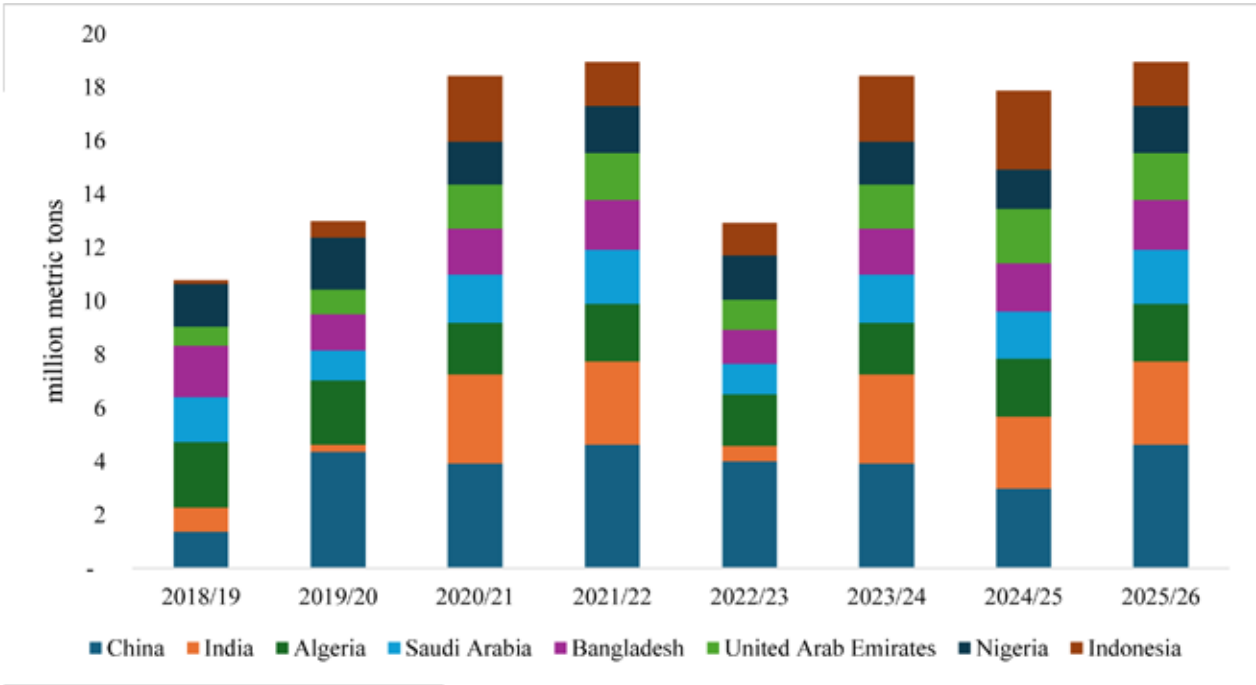
Source: Trade Data Monitor; Chart Post Brasília. *Forecast

From April 1st, 2025, to March 31st, 2026, Brazil exported 34.1 MMT of sugar, a three percent reduction from MY2024/25 (35 MMT). China remained the primary destination for Brazilian sugar at 4.6 MMT (13 percent of total exports), followed by India at 3.1 MMT (9 percent) and Algeria at 2.1 MMT (6 percent). Total export revenue for MY2025/26 reached USD 13.5 billion, a 19 percent decrease from the previous marketing year (USD 16.6 billion).

Brazil is the world's largest sugar exporter, accounting for 59 percent of global sugar exports in calendar year 2025. Thailand ranks second with 10 percent, followed by India with seven percent. China became Brazil's largest sugar buyer in 2021, replacing Algeria and Bangladesh, which had previously alternated as the top destinations for Brazilian sugar.

According to public data, five sugar traders controlled 58.9 percent of bulk sugar exports in calendar year 2025. Wilmar led with 16 percent market share, followed by Alvean (13.7 percent), Sucden (12.2 percent), Raizen (10 percent), and Louis Dreyfus (7 percent).

Figure 12
Brazilian Sugar Exports Main Destinations, MY2018/19 to MY2025/26, in million metric tons tel quel



Consumption and Stocks

Post forecasts sugar consumption for MY2026/27 at 9 MMT, and sugar ending stocks at 221,000 tons (raw value). There is no official source for carry-over stocks in Brazil or for domestic sugar consumption. It is observed that fluctuations in sugar prices do not significantly affect domestic consumption.

Trade Policy

Tariff-Rate Quotas (TRQs)

For the United States, sugar imports are governed by tariff-rate quotas (TRQ), which allow a certain quantity of sugar to enter the country at a low tariff. TRQs apply to imported raw cane sugar, refined sugar, and sugar-containing products. The sugar import program meets the U.S. commitments under the Uruguay Round Agreement on Agriculture, which resulted in the creation of the World Trade

Organization (WTO). About 40 countries worldwide receive TRQ allocations based on historical trade to the United States. The top three quota-holding countries are the Dominican Republic, Brazil, and the Philippines.

USDA establishes the annual quota volumes for each federal fiscal year (FY October 1 – September 30), and the U.S. Trade Representative (USTR) allocates the TRQs among countries. Sugar and related products paying a higher, over-quota tariff may enter the country in unlimited quantities. All imports, whether within or over a U.S. TRQ are subject to tariffs imposed by relevant executive orders issued pursuant to the President’s authority.

USDA announced on June 17, 2025 the establishment of the FY 2026 (October 1, 2025 – September 30, 2026) TRQ for raw sugar at the WTO minimum amount of 1,117,195 metric tons raw value (MTRV). USTR allocated the TRQ on August 15, 2025. Brazil, the second-largest recipient of the U.S. sugar tariff-rate quota, received an allocation of 155,993 MTRV, which is equivalent to approximately 14 percent of the total TRQ. Brazil has consistently met its sugar TRQ allocation over the past several years.

Table 7

U.S. Tariff-Rate Quota for Brazilian Raw Sugar (metric tons raw value)

Fiscal Year	Original TRQ Allocation	Additional TRQ Allocation	Total
2013	155,634	n/a	155,634
2014	152,691	15,251	167,942
2015	152,691	37,978	190,669
2016	152,691	33,865	186,556
2017	152,691	30,000	182,691
2018	152,691	n/a	152,691
2019	152,691	22,464	175,155
2020	152,691	158,203	310,894
2021	152,691	34,577	187,268
2022	152,691	53,502	206,193
2023	155,993	76,580	232,573
2024	155,993	79,755	235,748
2025	155,993	n/a	155,993
2026	155,993	n/a	155,994

Source: USTR; Chart FAS Brasilia – As of March 26, 2026.

On July 17, USDA announced the establishment of the in-quota quantity of the FY 2026 refined sugar TRQ at 22,000 metric tons raw value (MTRV). This quantity includes the minimum amount to which the United States is committed under the WTO Uruguay Round Agreement. Of the 22,000 MTRV, 20,344 MTRV is established for any sugars, syrups, and molasses, and 1,656 MTRV is reserved for specialty sugar.

USTR is allocating the refined sugar TRQ as follows: 10,300 MTRV to Canada, 2,954 MTRV to Mexico, and 7,090 MTRV to be administered on a first-come, first-served basis. Additionally, USTR is allocating the 1,656 MTRV of specialty sugar to be administered on a first-come, first-served basis. This year, USDA elected not to add any additional specialty sugar to the refined sugar TRQ.

In FY 2025, USDA added 210,000 MTRV of specialty sugar to the FY 2025 refined sugar TRQ, of which Brazil accounted for nearly 50 percent of imports. With respect to the in-quota quantity of 64,709 metric tons (MT) of the TRQ for imports of certain sugar-containing products maintained under Additional U.S. Note 8 to chapter 17 of the HTSUS, USTR is allocating 59,250 MT to Canada. The remainder, 5,459 MT of the in-quota quantity, is available for other countries on a first-come, first-served basis.

European Union-Mercosur Agreement

On January 17, 2026, after decades of negotiations, the European Union (EU) and Mercosur blocs signed the EU-Mercosur agreement, which includes phased tariff reductions and safeguards for sensitive agricultural sectors. Approximately 90 percent of agricultural tariffs are scheduled for liberalization over time, with full duty-free access largely limited to non-sensitive products. For sensitive commodities, the agreement provides market access primarily through tariff-rate quotas (TRQs) that maintain volume ceilings while reducing in-quota duties.

For sugar, the agreement grants Mercosur exporters duty-free access for 180,000 metric tons of raw cane sugar (Very High Polarity – VHP) for refining, with immediate implementation upon entry into force. Paraguay received a new duty-free quota of 10,000 metric tons, although Brazil did not receive new Brazil-specific quotas.

Similar to U.S. sugar TRQs, the EU-Mercosur sugar quotas to be assigned to Brazil will be fully allocated to North-Northeastern sugar producers, as provided for in Law 9.362/1996. The Brazilian Ministry of Development, Industry, Trade, and Services (MDIC) has indicated that quota administration will require specific implementing legislation, and the distribution of quotas among producers will likely reflect current market shares.

In marketing year (MY) 2025/26, Brazil exported 619,787 metric tons of sugar to the 27 EU member countries. In MY 2024/25, total exports amounted to 431,067 metric tons. According to NovaBio and Sindaçúcar, associations representing North/Northeastern producers, part of the sugar exported by the region to the EU falls under tariff-rate quotas with duties reaching up to 98 euros per ton.

Despite the EU Parliament's decision to refer the agreement to the European Court of Justice (ECJ) to assess compliance with EU treaties, thus further delaying full implementation, the provisional trade agreement between Mercosur and the EU will enter into force on May 1, 2026, following ratification by Mercosur member countries.

For more information on the EU-Mercosur agreement, please refer to [EU-Mercosur Trade Agreement – The Brazilian Perspective and Agricultural Impacts](#).

Research and Development in Sugarcane Production

Cultivation Techniques

In response to climatic challenges and pressure for greater efficiency and lower production costs, some Northeast sugarcane producers are prioritizing soil management strategies to increase productivity and extend sugarcane field longevity. New cultivation methods, including agrominerals and remineralizers, are gaining adoption by improving fertility, biological balance, and crop resilience.

Agrominerals and remineralizers are natural mineral inputs that gradually replenish soil minerals and nutrients, promoting chemical, physical, and biological balance. Unlike fertilizers, which provide immediate plant nutrition, these inputs build long-term soil fertility with lasting effects between harvests. Primary agrominerals and remineralizers used in sugarcane cultivation include silicate rocks, phonolites, and potassic rocks, which supply nutrients such as silicon, potassium, calcium, and magnesium.

Beyond agrominerals and remineralizers, Northeast sugarcane producers are testing vertical planting techniques as an alternative to conventional systems. Conventional planting involves intensive soil preparation through plowing and harrowing, followed by opening furrows 20-30 cm deep where seedlings are placed manually or mechanically at 1.40-1.50 m spacing. This method requires approximately 10-15 tons of seedlings per hectare.

Vertical sugarcane planting inserts seedlings upright into the soil through slits reaching up to 80 cm in depth. This method promotes greater root development and plant tillering while eliminating the need for plowing and harrowing. Northeast sugarcane mills report that vertical planting increases productivity and offers a viable alternative in regions with severe water limitations.

Vertical planting uses an average of 6-7 tons of seedlings per hectare. Northeast mills employing vertical planting report substantially reduced failures in sugarcane field establishment and lower labor costs. However, vertical planting can complicate weed control and requires moist soil to reduce plant water stress, which can be achieved through irrigation.

Brazilian sugarcane mills also employ fertigation, which applies fertilizers, primarily vinasse, a byproduct of ethanol production that is rich in potassium, with irrigation water. According to mills, this technique increases sugarcane productivity by improving soil nutrition while reducing chemical fertilizer costs. The most common fertigation methods include sprinkler irrigation with hose reel or center pivot systems and subsurface drip irrigation.

Varietal Development

Sugarcane producers adopt improved varieties to increase productivity, enhance water stress resilience, and improve pest resistance. Leading institutions in varietal development include the Sugarcane Technology Center (CTC), the Agronomic Institute of Campinas (IAC), and the Interuniversity Network for the Development of the Sugar-Energy Sector (Ridesa). Companies such as Nuseed, Monsanto, Syngenta, and Copersucar also develop improved sugarcane varieties, though on a smaller scale.

According to the Ministry of Agriculture's National Service for Cultivar Protection (SNPC), 214 sugarcane cultivars are currently registered in Brazil.

Table 8
Protected Sugarcane Cultivars Registered – As of March, 2026

Institute	Cultivars
CTC	43
IAC	39
Ridesa	76
Monsanto	22
Copersucar	13
Nuseed	12
Others	9
Total	214

Source: Secretariat of Agricultural Defense, Ministry of Agriculture

Agronomic Institute of Campinas (IAC)

The Agronomic Institute of Campinas (IAC), through its IAC Sugarcane Program, develops technologies and varieties to increase cultivar productivity in sugarcane fields. Established in 1994, the program's accomplishments include developing varietal management models and characterizing production environments through soil surveys. IAC has also developed pest and disease management technologies and analytical methods for disease diagnosis. The program develops cultivars and transfers irrigated sugarcane production strategies to the sector while conducting research in nutrition, conventional fertilization, and residue utilization. The program operates through partnerships with the private sector and state and federal funding agencies. In 2024, IAC operated in 11 Brazilian states with 200 partner companies.

IAC has produced the Center-South Sugarcane Varietal Census for ten years. Under IAC Sugarcane Program coordination, the study consolidated information from 321 companies, mills, distilleries, suppliers, associations, and large producers, covering 7.5 million hectares across nine Center-South states—representing 90 percent of Brazil's total cultivated sugarcane area. This consolidated data constitutes the most comprehensive profile of Brazil's sugarcane genetic base. According to the 2025/26 varietal census, the most widely used genetic varieties in Center-South sugarcane fields belong to CTC and Ridesa's RB Network. Combined, the leading varieties from these two institutions account for approximately 43 percent of the total research area.

IAC varieties have increased their share of cultivated area in Center-South renewal areas, rising from 5 percent in the 2018/19 harvest to 12 percent in the 2025/26 harvest.

Sugarcane Technology Center (CTC)

The Sugarcane Technology Center was created in 1969 and pursues genetic improvement of sugarcane through conventional techniques, biotechnology, or innovations in planting methods with the objective of increasing productivity, protecting against diseases and pests, and adapting to different regions of the country. CTC maintains a sugarcane germplasm bank with more than four thousand varieties and operates laboratories in Piracicaba (São Paulo) and Saint Louis (Missouri/USA).

CTC monitors planting data from approximately 170 mills in the Center-South sugarcane region. According to results released by the company, CTC varieties' planting market share reached 31 percent of the share calculated on the current base of contracted clients, and 80 percent of planting was done with more recent varieties. Additionally, CTC plans to commercially launch four new varieties in the 2026/27 harvest.

CTC is also developing synthetic sugarcane seeds as an alternative to the current planting method of sugarcane cuttings. According to CTC, synthetic seeds would improve productivity by allowing faster variety changes. One of CTC's objectives is to double sugarcane yields from the current average of 75 metric tons per hectare (MT/ha) to 150 MT/ha by 2040.

Interuniversity Network for the Development of the Sugar-Energy Sector (Ridesa)

In 2025, the federal universities comprising Ridesa celebrated 55 years of developing RB sugarcane varieties and 35 years of network operations. (RB identifies varieties originating from Ridesa and stands for República do Brasil—Republic of Brazil.) The genetic improvement program began in 1990 with the formation of a university network comprising ten institutions in Mato Grosso, Goiás, São Carlos, Paraná, Rio de Janeiro, Viçosa, Sergipe, Alagoas, Pernambuco, and Piauí. At that time, Ridesa varieties occupied 5 percent of Brazil's sugarcane area; by 2024, they occupied 56 percent.

Ridesa currently maintains 134 RB sugarcane varieties. Research activities are developed and shared among all network universities, which maintain autonomy to develop RB varieties. In the 2024/25 harvest, RB varieties covered 7.3 million hectares across 11 states.

Ridesa estimates that genetic improvement contributes 50 percent of sugarcane productivity gains through continuous replacement of varieties with more productive ones. Beyond conventional breeding, Ridesa conducts research in sugarcane biotechnology, including plant tissue culture, genetic transformation, molecular biology, molecular marker technology, and transgenic plant development.

Climate Updates

The Center-South region, which accounts for more than 90 percent of national sugarcane production, faced adverse climatic conditions during MY2024/25. The severe water deficit significantly affected sugarcane productivity.

Fires devastated between 180,000 and 450,000 hectares of sugarcane fields from August to September 2024, with consequences extending into the MY2025/26 harvest. Cane quality declined as a result, with reduced total recoverable sugar (TRS) concentration and diminished regrowth capacity in affected areas.

Compounding these challenges, sugarcane wilt syndrome (a complex of fungal diseases) affected approximately 30 percent of sugarcane fields, causing productivity losses of approximately 45 percent, according to Cepea.

Throughout 2025, milder and more balanced climatological conditions compared to previous years enabled sugarcane field recovery, which should benefit the MY2026/27 harvest with improved yields. Rainfall during January through March is crucial for estimating harvest volume. Average accumulated rainfall in the region during these three months reached 613.8 millimeters (mm), making it one of the rainiest first quarters in the last three years. The climatological normal for this period is 611.9 mm. This rainfall volume is a key factor supporting the forecast of a strong sugarcane harvest for MY2026/27.

March marks the end of the inductive period for sugarcane flowering in the Center-South, which begins in February. This process benefits from intense rainfall, low solar radiation, and low thermal amplitude. Most Center-South areas presented favorable conditions for flowering in this harvest.

March concluded the rainy pattern in Center-South sugarcane fields with precipitation above climatological norms. The monthly average accumulation was 183.3 millimeters, 12.9 percent higher than the historical average of 166.8 millimeters. Rain was well distributed across most states in the region, and soil moisture remained at high levels, ending the month at 95.6 percent average soil moisture. By comparison, Center-South soil moisture in March 2025 was 83.8 percent, and in March 2024 it was 85.4 percent. The standard moisture level for March is 100 percent.

The April forecast indicates above-average rainfall during the first fifteen days in São Paulo, Paraná, southern Mato Grosso do Sul, and Minas Gerais. In subsequent weeks, precipitation is forecast to remain within climatological norms in sugarcane regions.

With the influence of the Intertropical Convergence Zone (ITCZ), rainfall in the Northeast intensified between March and April 2026. The precipitation restored soil moisture in the Northeast, which reached an average of 96.1 percent by the end of March. During the same period in 2025, average soil moisture stood at 87.9 percent, and in 2024, at 82.1 percent. For April, forecasts indicate rainfall near the climatological normal, with a trend toward intensification during the final 10 days of the month.

According to specialized agencies, the probability of El Niño development between May and July increased from 45 percent to 61 percent. El Niño has mixed effects on sugarcane in Brazil. In the Center-South region, heavy rainfall during winter and spring can interfere with harvesting, lower sucrose concentration, and promote disease. However, during certain phases, it improves soil moisture levels and increases sugarcane development. In the North and Northeast, El Niño causes drought conditions that damage crop development.



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Toasting and Charring

Nothing has a greater impact on oak's chemistry than toasting. The chemical bonds between the three major polymeric building blocks (cellulose, hemicellulose and lignin) are disrupted, especially the hemicellulose and lignin. There are major changes happening to the structure as well as to the number of tannins as they are destroyed by heat.

There are several factors involved, such as toasting temperature and total duration that have an effect on which flavor compounds will form and at what depth they are maximized. It is during this process that one needs to keep in mind the density of the oak since American oak is denser than French oak. So the rate of heat penetration will be different.



Inner surface of a toasted oak barrel

Also, during the process of toasting, tannins are substantially destroyed by the heat. You can still get tannins about one-third of the depth from American oak staves, but they are almost completely depleted in the French oak. The barrel's shape will also limit the toasting temperature and duration. Since all of the heat is applied to the inside surface of the barrel, there is a natural temperature gradient that varies throughout the depth of the stave. Say the visual penetration of the toast goes in about a quarter inch into the wood, the chemical changes are occurring at a much deeper level. Hence, the extent to which flavor chemicals are formed and the precise depth at which they are maximized depends greatly on the amount of heat applied and the length of toasting time and temperature.



Oak barrels being charred

Traditionally, the terms *light*, *medium* and *heavy* toast are used based on the duration of the heat treatment and the resulting visual appearance of the inside of the barrel. Light toast implies only a mild darkening of the staves; a medium toast has the same appearance as toasted bread; and a heavy toast is very dark, almost like a dark chocolate. As the wood is heated during toasting, the flavor compounds begin to break down releasing certain colors, aromas and flavors. For example, hemicellulose will release simple sugars, such as glucose, xylose, rhamnose and arabinose. Lignin, on the other hand, releases vanillin when heated. The process for toasting can take about 12 minutes for a medium toast and 18 minutes for a heavy toast.



Inner surface of a charred oak barrel

Charring on the other hand is the process of “burning” the staves. This method acts like an activated-carbon filter to adsorb sulfur compounds. Charring, with the help of temperature, produces a deeper colored rum and higher production of esters, but over-charring the barrels can actually destroy some of the flavor chemicals that are needed to obtain a well-balanced aged rum.

Our special thanks to Independent Stave Company for their support in our research of oak.

CIGAR & RUM PAIRING

by Philip Ili Barake





My name is Philip Ili Barake, Sommelier by trade. As a result of working with selected restaurants and wine producers in Chile, I started developing a passion for distilled spirits and cigars. As part of my most recent job, I had the opportunity to visit many Central American countries, as well as, rum distilleries and tobacco growers.

But my passion for spirits and cigars did not end there; in 2010 I had the honor of representing Chile at the International Cigar Sommelier Competition, where I won first place, becoming the first South American to ever achieve that feat.

Now I face the challenge of impressing the readers of "Got Rum?" with what is perhaps the toughest task for a Sommelier: discussing pairings while being well aware that there are as many individual preferences as there are rums and cigars in the world.

I believe a pairing is an experience that should not be limited to only two products; it is something that can be incorporated into our lives. I hope to help our readers discover and appreciate the pleasure of trying new things (or experiencing known things in new ways).

Philip
#GRCigarPairing



55 at 55 South

In July of this year, I started working on a project, a new hotel located in Puerto Williams, the Southernmost city in Chile. We are still in the middle of the construction phase, but we are planning to host our first Silver Sea clients in October. This is a very challenging and special goal. As with every new project, we are starting from scratch, recruiting the best talent and attempting to have the best amenities possible given the remote nature of the location: a secluded island in the South of Chile, called Navarino Island, located on the 55 South Latitude.

One of the reasons I chose this project is to evaluate the feasibility of constructing a distillery and aging warehouse in this area, featuring an additional small, cozy space for cigar smokers to enjoy great cigars with a range of distilled spirits produced and aged locally. There are many other aspects of the project, but I'll be sharing those in due time, as we make progress along the way.

For this pairing, I had to work around the work schedule to find the time to enjoy the terrace at the Lodge where I'm staying. Finally, Sunday arrived, the day was sunny and the view of the snowed landscape was perfect to celebrate the first pairing done here.

Among the cigars I brought with me for the pairings, I selected a Rocky Patel that is homonymous with the Hotel: it was a Fifty Five, launched to celebrate the 55th birthday of Rocky Patel. It is a premium cigar from the Artisan Series, Small Batch. It is an unusual Robusto, featuring 55 ring and 5.5" in length, made with Nicaraguan wrapper and filler, and with Costa Rican binder.

Upon visual examination, the cigar's semi-dark (Maduro) wrapper suggests the flavor intensity made with Nicaraguan tobaccos.



Photos credit: @Cigarili



I performed the cut using a cigar scissor. Lighting the cigar was a challenge due to the weather: it was -4 degrees Celsius and, despite the sunny day, every fingertip was feeling the intensity of the cold.

The first third of the cigar was solid and had a medium intensity, it featured hints of dried fruits and wet soil. I thought that the draw was going to be challenging, but it was surprisingly good and deep.

Keeping the weather in mind, my initial plan was to do the pairing with a warm drink, even something along the lines of an Eggnog, but the hotel's bar is not yet ready for this type of preparation. Consequently, I opted for an Espresso Martini made with a rum that was available at the bar, the goal was to end up with a simple cocktail that featured both the coffee and the rum. The best thing about this outdoor pairing was that the cocktail remained cold for the duration of the cigar smoking, something that every cigar smoker appreciates. My

fingers, on the other hand, were not quite so happy, it would have been better to be wearing gloves!

During the second third (the "heart" of the blend), the cigar continues to showcase the same profile, with emerging spicy notes at the end of each puff. It is possible that the notes emerged due to the increased frequency of my puffs (brought on by the cold), but regardless of the cause, it fit very well in the pairing.

The cigar in its entirety was spectacular, excellent draw and consistent intensity that was not overwhelming (as it is sometimes with Nicaraguan cigars). It is a highly recommended pairing.

If we end up having a Cigar Lounge in this new luxury hotel, this is definitely a cigar we'll be keeping in stock.

Philip Ili Barake
#GRCigarPairing



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