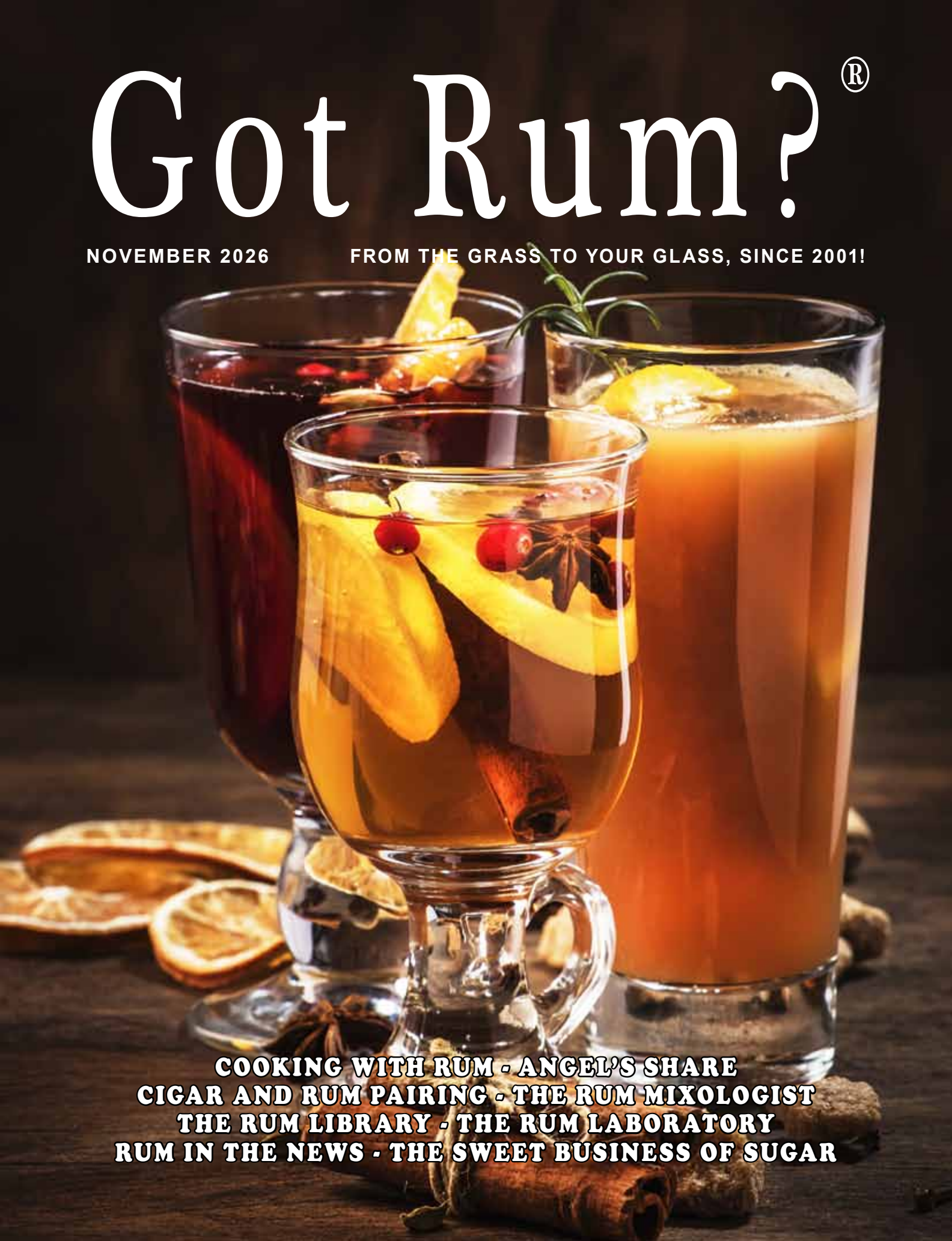
Got Rum?®

NOVEMBER 2026

FROM THE GRASS TO YOUR GLASS, SINCE 2001!



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



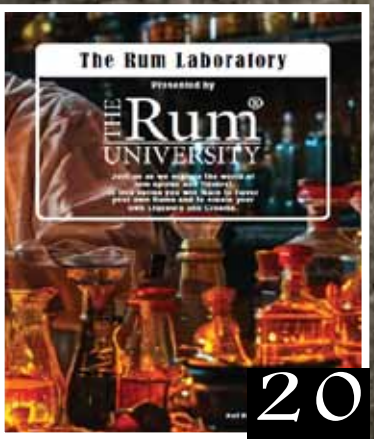
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pasta

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THE RUM
Mixologist

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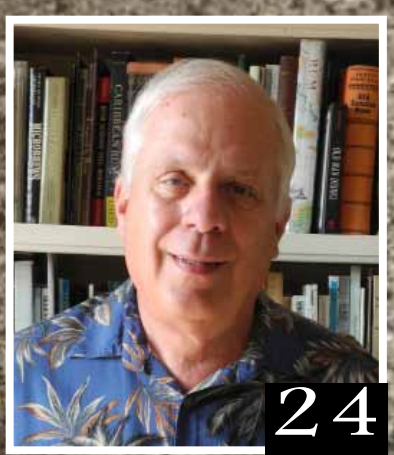

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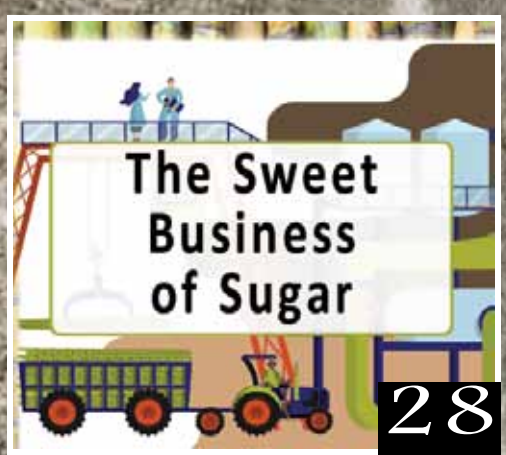
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Got Rum?®

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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November 2026

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FRONT COVER: Autumnal Libations
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FROM THE EDITOR

Spice Time, Again

Yes, it is **Pumpkin Spice** season again. But while those spices dominate the headlines and the Lattes on coffee shop countertops, it is important to recognize the many other herbs and spices that have had a variety of interesting uses throughout history. From herbal medicine, to superstitious rituals, to textile dying, fragrance, and flavor, the fascinating history of herbs and spices is truly endless.

- Saffron is worth more than gold: commonly known as "Red Gold," it can costs upwards of USD $5,000 per pound. It takes over 75,000 hand-picked crocus flowers to produce just one pound.
- Black pepper was once money: peppercorns were so valuable in the ancient and medieval worlds that they were used as currency to pay dowries, taxes, and salaries.
- The "Black Pepper" and white pepper secret: Black, green, and white peppercorns all come from the exact same climbing vine (*Piper nigrum*), just picked at different times or processed differently (a black peppercorn even has a white peppercorn hidden inside).
- Nutmeg and mace are twins: both come from the fruit of the Myristica fragrans tree; the hard brown seed inside is the nutmeg, and the bright red, lacy web wrapped around it is mace.
- Columbus made a famous naming mistake: When Christopher Columbus sailed to the Americas in search of black pepper and spices, he encountered chili peppers and mistakenly called them "pepper," a mix-up that stuck.
- Cilantro and coriander are family: Cilantro is the fresh leafy herb of the plant, while coriander refers to its dried, citrusy seeds.



- Vanilla is an orchid product: It is the second-most expensive spice in the world because the tropical orchid pods require manual hand-pollination.
- Sesame Seeds were used in ancient Egypt for cleansing rituals, as a symbol of immortality in funeral ceremonies.

As we head into the holidays, many of us will be tasked with cooking for, and entertaining relatives and friends. If so, remember Mokokoma Mokhonoana's advise:

"A good spice often deceives us into thinking that someone is a good cook."

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!

Don Q Reserva Especial

In 2026, Don Q released two new expressions: Don Q Reserva and Reserva Especial. The Reserva Especial rum is a blend of molasses-based rums that are created using column still rums and aged in used bourbon barrels that have been aged for seven to ten years before being blended to 40% ABV and bottled for distribution.

Appearance

The Don Q brand uses two different custom bottle designs for their product line. For their Reserva Especial, they use a short-necked 750 ml bottle that has Serrallés Reserva embossed across the bottle below the neck. The metal cap is engraved with the Don Q logo and secures a synthetic cork to the bottle.

The liquid has a solid amber color with orange hues cutting through it in the bottle and glass. Swirling the liquid creates a thick band that releases a wave of fast-moving legs. As the band thickens, it releases additional legs for a few minutes.

Nose

The aroma of the rum delivers a mix of salted caramel, vanilla, smoky oak tannins, and dried honeyed apricots.

Palate

The first sip delivers notes of smoky oak and alcohol that condition the palate to the flavors in the profile. The smoky element was present with every sip and formed the baseline of the experience. Light notes of dried apricots and mangoes, with a hint of toasted coconut, form the midline while caramel and vanilla swirl in the out of the experience forming the top notes of the flavor profile. The flavors merge, and the wood notes dominate in a mineral rich and lightly astringent char finish.

Review

I enjoyed this rum from the first sip to the finish. The way the flavors danced in the profile made it a positive sipping rum experience that has the bonus of also being a useful cocktail ingredient. It really shined in a Rum Old Fashioned, as it showcased just how well balanced this rum is with those cocktail ingredients. At one point I had to double check it was 80 proof, because it really felt like it was hitting slightly out of that proof and a bit heavier than most column still rums. Overall, it is a wonderful addition to the Don Q portfolio of rums.



www.donq.com

THE ANGEL'S SHARE

by Paul Senft

Mai-Kai Rum #1

The historic Mai-Kai restaurant based in Fort Lauderdale, Florida reopened in 2024 after a four-year closure and major renovation. As part of this reopening, the Mai-Kai company decided to bottle its own rum to commemorate the new era of the restaurant. To create this rum, they partnered with Maison Ferrand, who sourced high-ester pot still rums from the West Indies Rum Distillery in Barbados and Long Pond Rum Distillery in Jamaica. They combined the rums and blended them to 50% ABV in Cape Coral, Florida, in the hopes of recreating a rum flavor profile that was close to the vintage rums that would have been around when the restaurant opened in 1956 and used in the Mai Kai's original cocktail recipes.

Appearance

The custom one-liter bottle is packaged in a colorful green box that matches the bottle's design. The box and bottle provide information concerning the inspiration behind the rum and a small amount of data about the sources of this new rum blend. The bottle has a neck wrap that states that this is Bottle # 01428. The neck wrap label has Rum No. 1 and a jade tile across the wood cap that holds a synthetic cork. The bottle has Mai-Kai embossed on the bottle below the neck and then flowers and a weave around the bottom of the bottle.

The rum has a dense and dark caramel color in the bottle and only lightens slightly in the glass. Swirling the rum creates a razor-thin line that slowly thickens and releases a single wave of slowly moving legs, and then after it finishes expanding, it releases additional waves of fast-moving legs before evaporating, leaving a ring of residue around the tasting glass.

Nose

The aroma leads with burnt molasses syrup, ripe bananas, toffee, toasted oak, dark vanilla, and tropical fruit.

Palate

The first sip of the rum provides a chewy mouthfeel that lights up the tongue with a swirl of overripe fruit, rich caramel, and astringent oak tannins. Additional sips reveal dark cacao, allspice, fresh tobacco, ripe banana, kola flavor, and minerals. The charred oak tannins and caramel-kola notes return to form a long, funky, bitter finish.

Review

Understanding that this rum was engineered to be a high-ester rum in a cocktail, and not one most rum enthusiast would be inclined to sip is easy to comprehend after experiencing it. It is also problematic because of the overwhelming elements in the rum. The flavor profile has a rough and tumble punch that is difficult to subdue in the average fruit-based tropical/Tiki cocktail. As far as using it in home cocktails, one would have to think carefully and experiment to see what recipes the rum works best in. I see it functioning in the Mai-Kai classic drinks such as the Rum Barrel or Black Magic, which have strong flavors built into them. However, it might be challenging for recipes that call for lighter rum components, as the rum easily dominates simple tart and sweet ingredients. I have been informed that it works well when balanced with other rums or used as a flavor enhancer but otherwise had the noted limitations when used as the primary rum ingredient. Currently, the rum is only sold at the Mai-Kai and is an intriguing souvenir to bring home after experiencing the restaurants' show, food, and historic garden.



www.maikairum.com

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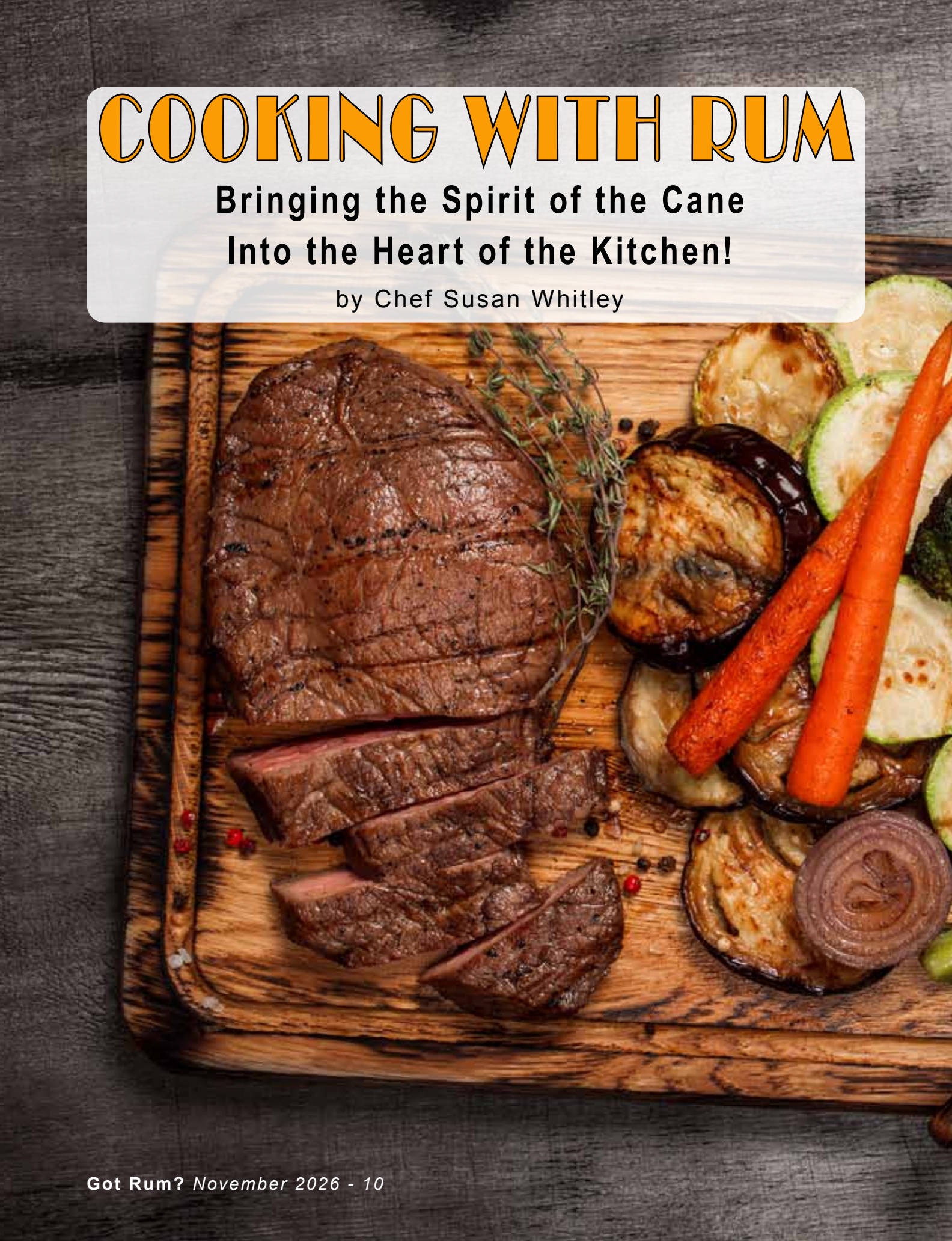
For more information, please send an email to:

margaret@gotrum.com

COOKING WITH RUM

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

by Chef Susan Whitley





Rum Raisin Smothered Pork Chops

Meat Preparation:

- 1 Tbsp. Olive Oil
- ½ Tbsp. Butter
- 2 Pork Chops, thick
- Salt and Pepper to taste
- Sprinkle brown sugar on chops

Directions:

1. Make small incisions on the sides of your pork chops. This will allow them to be flat in the pan and not curl. Then season the chops with salt and pepper. Sprinkle brown sugar on both sides of the pork chops.
2. Preheat oven to 350°F. While oven is warming up, using an oven safe sauté pan, place pan over medium to medium-high heat. Add 1 tablespoon of olive oil and ½ a tablespoon of butter. Add the seasoned pork chops to the pan and sear for about 3 minutes on each side or until golden brown.
3. Place pan with pork chops into oven to finish cooking the pork chops until internal temperature is 145°F.
4. Remove pan from oven. Take the pork chops out of the pan and onto a plate and allow chops to rest. Pour the juices (also called fond) into a measuring cup or small bowl. Do not discard these juices, we will be reincorporating the fond to make the rum raisin sauce.

Rum Raisin Sauce

Ingredients:

- ½ C. + 2 Tbsp. Dark Rum
- ¼ C. Pan Juices
- ½ C. Heavy Cream
- ¼ tsp. Allspice
- ¼ tsp. Nutmeg
- ¼ C. Raisins
- Salt and Pepper to taste
- ½ Tbsp. Butter
- Green Onions, for garnish

Directions:

1. It is time to make the rum raisin sauce. First, deglaze the pan.
2. Return pan to medium to medium-high heat. Pour ½ cup dark rum. Return to the cup with the fond and skim the fat off the top. Then pour the remaining liquid into the pan.

3. Add ½ cup Heavy Cream, ¼ teaspoon Allspice, ¼ teaspoon Nutmeg and ¼ cup Raisins. Stir everything together and lower heat to a simmer.
4. Once the sauce starts to simmer, it will take about 5 minutes for the sauce to start thickening. When you stir with your spoon and can see the pan, it is at this point that you need to taste the sauce and adjust seasoning if necessary.
5. Add a little bit of black pepper and a dash of salt. Stir and remove from heat. Add ½ tablespoon of butter, this will make the sauce nice and creamy.
6. Once the butter has melted add the two tablespoons of dark rum.
7. Stir the sauce one last time and it is ready to pour over the pork chops.
8. Garnish plate with chopped green onions.

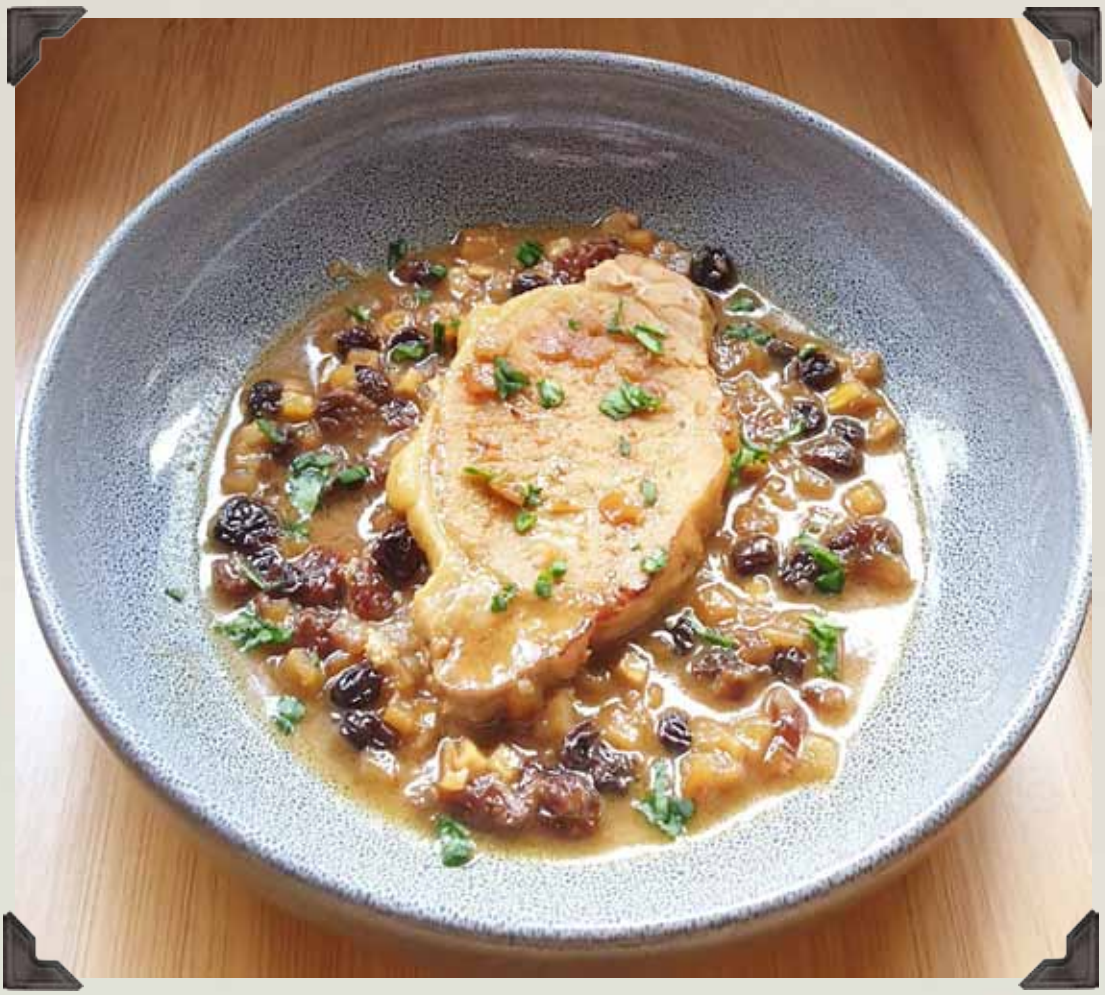
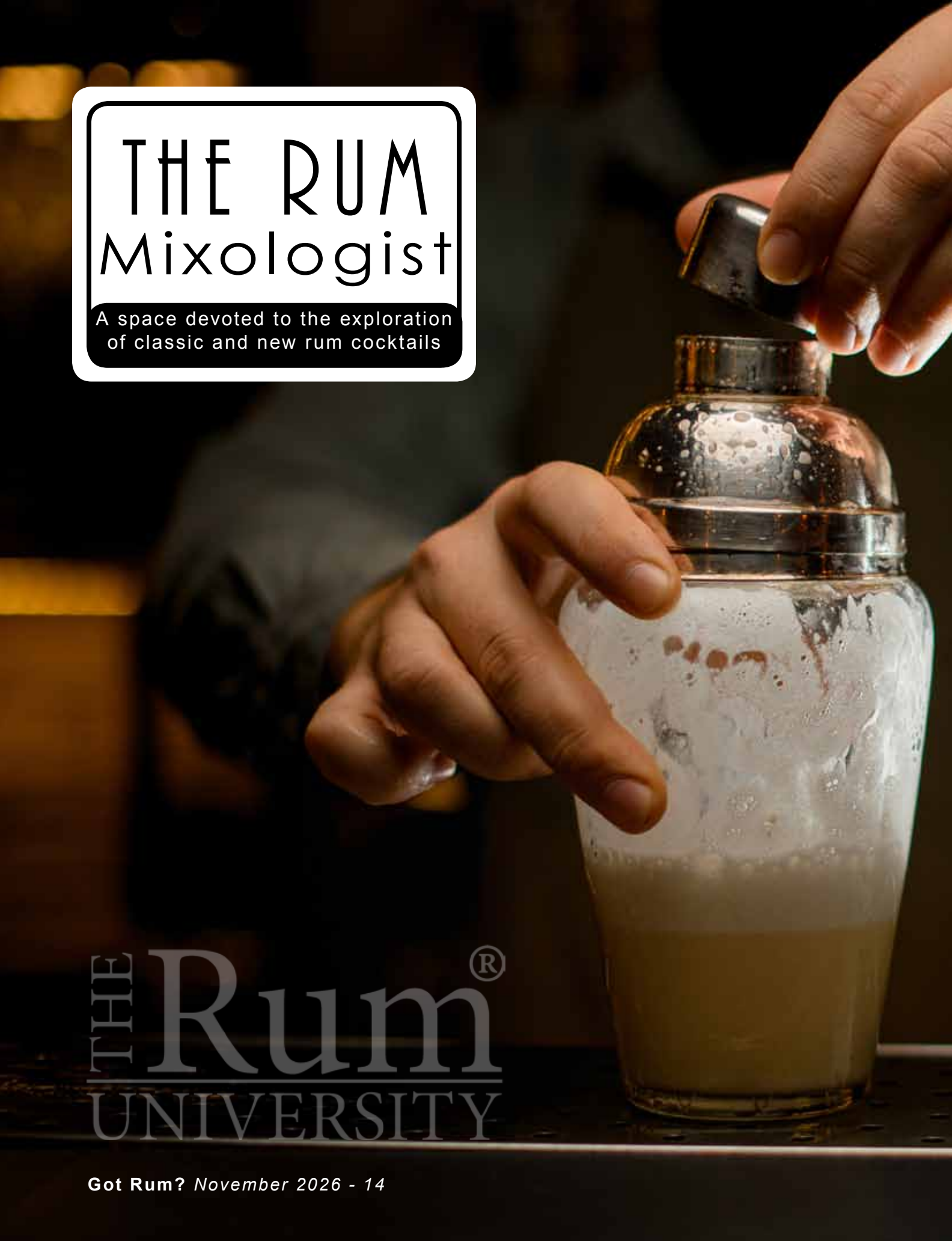


Photo Credit: www.fyf20quid.co.uk



THE RUM Mixologist

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

THE Rum® UNIVERSITY



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.


THE Rum® UNIVERSITY



THE RUM Mixologist

Dirty Banana

If you're a banana lover, this combination of aged rum, banana, coffee liqueur, and half-and-half might just become your new favorite frozen drink. It's unclear where and when the Dirty Banana first originated, but today the tropical-leaning drink is popular at many Caribbean resorts.

Ingredients:

- 2 ounces rum
- 1 ounce banana liqueur
- 1 ounce coffee liqueur
- 2 ounces half-and-half (or 1 ounce heavy cream and 1 ounce whole milk)
- 1 banana, slightly overripe, cut into chunks
- Garnish: banana chunk, with peel

Directions:

1. Add all ingredients into a blender with a small (6 ounce) scoop of ice and blend until smooth.
2. Pour into a Collins glass.
3. Garnish with a banana chunk.

Source: Liquor.com



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

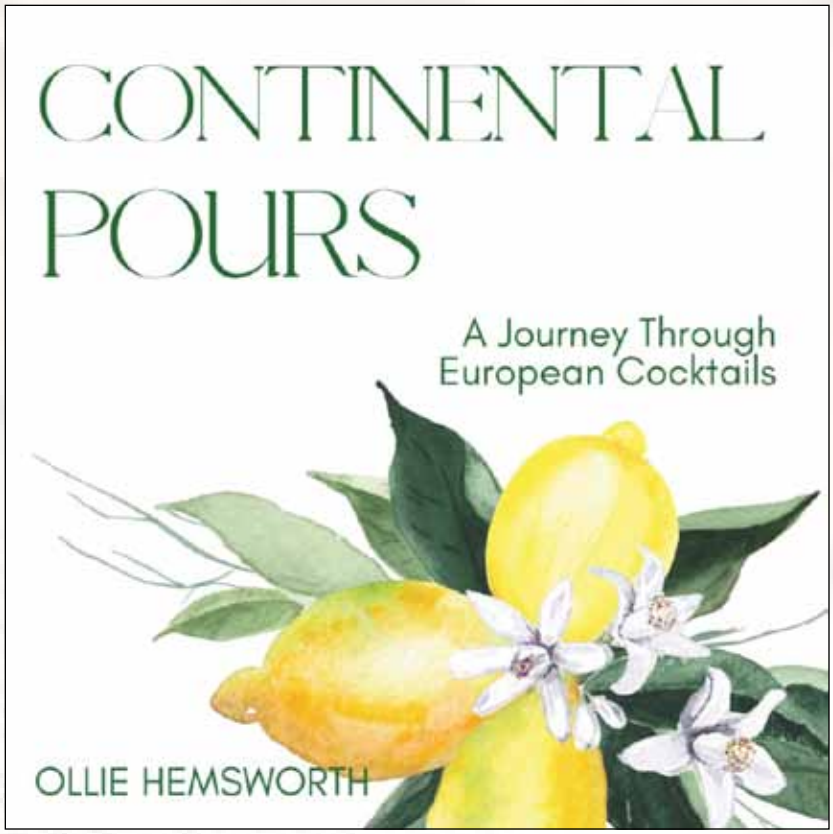
CONTINENTAL POURS: A JOURNEY THROUGH EUROPEAN COCKTAILS:

184 Recipes from 46 Countries, Featuring Local Spirits, Regional Flavors & Signature Ingredients by Ollie Hemsworth

(Publisher's Review)

Journey Across Europe — One Cocktail at a Time

From the misty whisky distilleries of Scotland to the sun-drenched lemon groves of the Amalfi coast, Europe tells its story one glass at a time. Continental Pours is a continent-spanning invitation to drink your way across 46 countries, pouring the local spirits, regional flavors, and signature ingredients that give each place its soul.



Inside you'll find 184 carefully crafted recipes, each measured, tested, and ready to make at home:

Sip a caraway-cold aquavit in Copenhagen and a bison-grass vodka in Kraków

Muddle Sicilian blood orange in Palermo and rose-scented rakia in Plovdiv

Explore bold, savory cocktails built on aged cheeses, cured hams, and briny oysters

Master everything from three-ingredient classics to expert-level creations

What's inside:

- 46 country chapters, from Iceland to Italy, Portugal to Poland
- 184 unique recipes with US and metric measurements
- Four difficulty levels — from Simple to Expert
- A short guide to each nation's drinking culture and heritage spirits
- Clear ingredients, step-by-step methods, glassware and garnish notes

Whether you're a curious beginner or a seasoned home bartender, Continental Pours is your passport to the flavors of Europe — no plane ticket required.

ASIN: B0H7FTJXZF
Publisher: Independently published
Publication date: July 2, 2026
Language: English
Print length: 236 pages
ISBN-13: 979-8185350416
Item Weight: 1.2 pounds
Dimensions ‏ : ‏ 8.5 x 0.54 x 8.5 inches

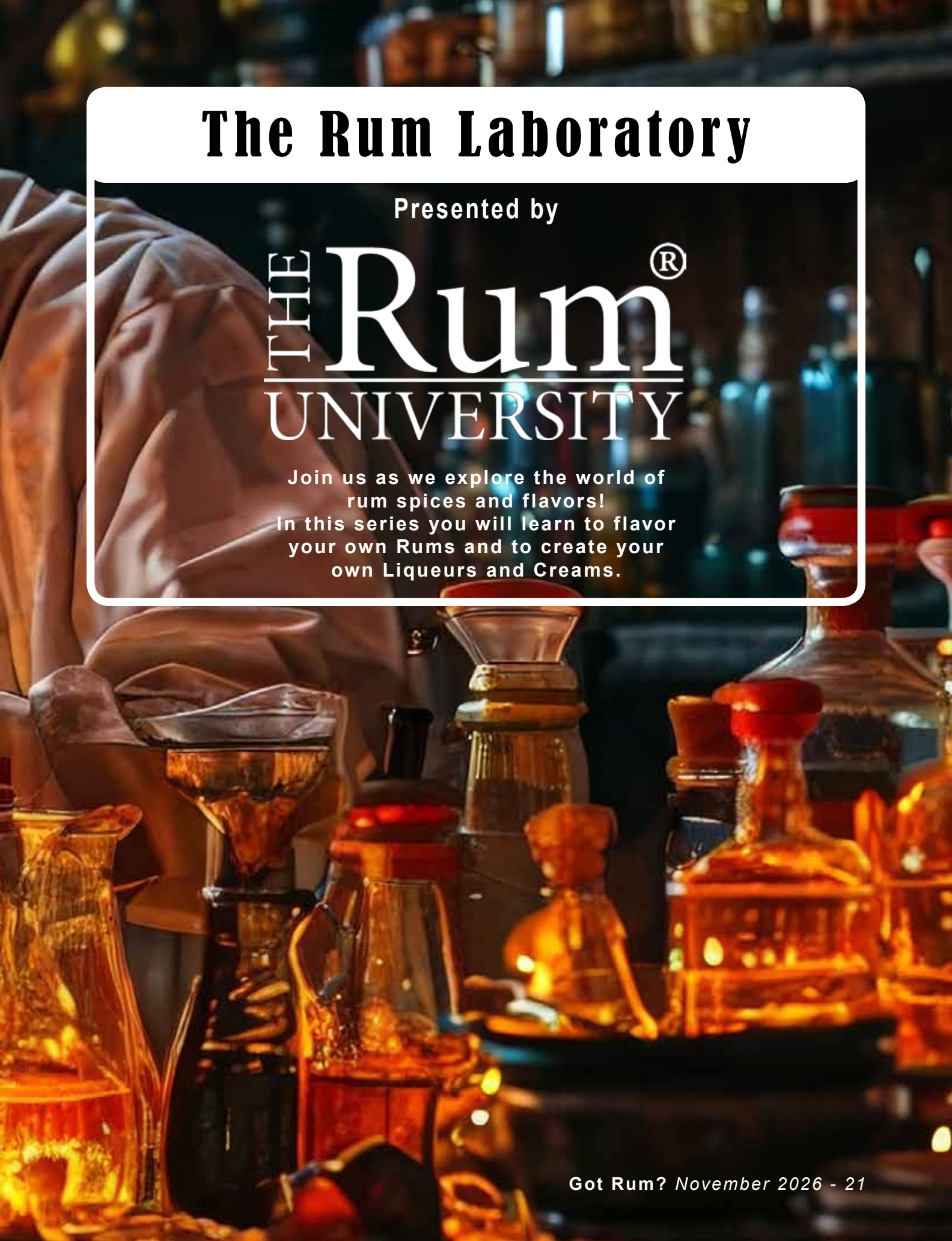


The Rum Laboratory

Presented by

THE Rum® UNIVERSITY

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

Martinican Punch Coco

Ingredients

For the homemade coconut milk:

- 3-4 coconuts (including their water)
- 200 ml of water per coconut (so 600-800 ml)

For the punch coco:

- 800 ml of coconut milk
- 300 ml sweetened condensed milk
- 100 g cane sugar
- 1 tbsp cinnamon powder (or 2 sticks cinnamon)
- 1 tbsp nutmeg powder
- 1 tbsp ginger powder
- 2 tbsp vanilla extract or 2 vanilla pods
- 300 ml white rhum agricole
- 200 ml rhum vieux (dark rhum agricole)

Preparation

For the coconut milk:

Clean your coconuts and break them into smaller pieces before putting them into a food processor. You can also shred them by hand but it's a lot of work. Heat up the water and coconut water but don't bring it to a boil.



Pour the warm water on top of the shredded coconut into a large bowl and start mixing together with your hands. Massage well for about 5 minutes.

Drain the soaking coconut through a kitchen towel in 3 parts. Try to squeeze out as much milk as possible.

For the Punch Coco:

Use 800 ml of the just prepared milk and slowly heat it up in a large pot together with the sweetened condensed milk. Add all the condiments, sugar and vanilla (if using vanilla pods halve them before). Keep stirring for 45 minutes to about an hour on a low flame so that it reduces and thickens slowly.

Use a wooden spoon and swipe with one finger on the back of the spoon. When the liquid stays in place it's the perfect consistency.

Cool completely at room temperature and mix together with the two types of rum (this will make about 1.3 l). Fill in a bottle or drink right away with some ice.

Source: eileenskitchenstories.com

RUM IN THE NEWS

by Mike Kunetka





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.

APPLETON ESTATE

Appleton Estate has announced the 2026 release of Hearts Collection 1999, now aged for 26 years. First released in 2020, this new offering has spent five additional tropical years aging, adding new layers of depth and complexity to an already remarkable rum. Crafted in the heart of Nassau Valley by Master Blender Joy Spence in partnership with rum connoisseur Luca Gargano, this release celebrates the rarity and artistry of the Estate's 100% pot-still rums. The 2026 Hearts Collection 1999 comes from only 10 casks distilled in Forsyth Pot Still in 1999 and aged for more than 26 years. According to Appleton Estate, the result is a multi-layered, complex, sippable rum that opens with notes of chocolate fudge, freshly brewed coffee, raisins, and floral, earthy, herbal spices. The palate is mellow and centered on honeyed oak notes, leaving you craving more. "1999 has become more memorable," said Dr. Joy Spence. "Returning to these casks revealed liquid of exceptional quality, that had only grown more delicious and complex with every passing year. We simply could not keep it to ourselves."

The 2026 release joins eight previous Hearts Collection expressions: 1994, 1995, 1999, 1984, 2003, 1993, 2002 and 1998. www.appletonestate.com

RUM CAKE & CARIBBEAN BLACK CAKE FESTIVAL

How many ways can the Caribbean make a holiday cake? At this year's Rum Cake & Caribbean Black Cake Festival, guests will have dozens of delicious ways to find out. Celebrating its fifth anniversary on Sunday, November 15, from 2–6 p.m., the festival brings together 23 bakers, each representing a different Caribbean country or territory, at The Venue Fort Lauderdale in Wilton Manors. Guests can sample even more cake varieties than countries represented, alongside specialty Caribbean spirits, regional cuisine, holiday performances and shopping. The festival's signature Hall of Bakers presented by Barbados features participants representing the French-, Dutch-, Spanish- and English-speaking Caribbean traditions including Antigua and Barbuda, The Bahamas, Barbados, Belize, the British Virgin Islands, Colombia, Costa Rica, Dominica, the Dominican Republic, Grenada, Guyana, Haiti, Jamaica, Montserrat, Panama, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, the United Kingdom and the U.S. Virgin Islands. "With bakers curated by our production partner Caribbean Professionals Network, we've made a deliberate effort to make this the broadest Caribbean representation in the festival's history," said Calibe Thompson, Executive Director of Island SPACE Caribbean Museum. "Whether you grew up with these traditions or are discovering them for the first time, we want you to learn, explore, indulge and enjoy. You can discover something about your Caribbean neighbors; try flavors from places you've never visited and perhaps find inspiration for your next Caribbean vacation." For guests 21 and older, the premium Rum Room offers multiple tastings of distinctive Caribbean spirits and cocktails curated by Coconuts & Cocktails. Featured brands include Travellers One Barrel Rum and Cuello's Caribbean Rum from Belize, El Dorado Rum from Guyana, Mighty Sparrow XO Trinidad Spiced Rum, Melky Jean's Saint Sauveur 1972 Haitian Heritage Rum and Pòtieri's Caribbean-inspired passion fruit cocktail. Rum purveyors will introduce guests to the region's diverse rum-making traditions. www.islandspacefl.org

LEMON HART RUM

In the late 18th century, Lehman ("Lemon") Hart took over the family business and successfully expanded the company's interests beyond the basic trading of rums to also include specialized blending and production of the finest rums from the Caribbean, resulting in remarkably smooth and flavorful rums. Lemon Hart masterfully crafted his own signature blend of rum using select Demerara rums originating from a distillery on the East Bank of the Demerara River in the lush tropical Caribbean country of Guyana. In 2010, the Canadian-based company Mosaiq Inc. acquired the Lemon Hart brand from Pernod Ricard and implemented "A Return to Heritage" initiative for the brand starting with the reestablishment of the Lemon Hart & Son company. In addition to their existing bottlings, Original 1804, Blackpool and LH151, Lemon Hart & Son's eighth Master Blender, Michael Booth, has crafted three new blends:

- LEMON HART & SON – 86 PROOF – SMALL BATCH RUM is a pre-Prohibition expression of their signature blend.
- LEMON HART & SON – 96 PROOF – SMALL BATCH RUM is a tribute to early Tiki culture (and one of Donn Beach's favorite Lemon Hart & Son expressions)
- LEMON HART & SON – 114 PROOF – SMALL BATCH RUM is the true spirit of a British-style dark Demerara rum, formulated at its historical London Dock strength of 100° proof spirit (57.1% ABV) and crafted under the guidance of the century-old traditions.

https://lemonhartrum.com/

HOLMES CAY

When Holmes Cay first released their Fiji 2004 16 year in 2020, the Robb Report would call it one of the "21 Best Rums of the 21st Century". The equally well received 17-year version followed. In total, they released 8 barrels of the Fiji 2004 between 2020 and 2022. They kept one final barrel to continue aging at their New York warehouse, to see how this legendary distillate would develop. The Fiji 2004 21 Year Rarest Edition is an ultra-limited and boxed and numbered single-cask offering of 188 bottles, distilled from locally produced molasses on the pot still at South Pacific Distilleries in Lautoka, Fiji. Tropically aged for 12 years, it then spent an additional 5 years in the UK in an American oak recycled rum cask and an additional 4 years in New York state in the same cask. Bottled at 58% ABV.

Also arriving this month is the latest in their Ten Cane vertical offering, TRINIDAD 2012 13 YEAR. The series allows enthusiasts to compare how a group of 2012 Ten Cane casks evolve and mature. Now at 13 years old, the 2012 distillate is increasingly complex. Unlike Trinidad's typical molasses rums or cane juice Rhum Agricole, 10 Cane rum began from fresh sugar cane juice in a five-day ferment which was then double pot-distilled and placed in an ex-cognac cask. Rather than aging for just under a year to become 10 Cane, this forgotten cask aged for 4 years in the tropics, 5 years in England in an ex-rum cask, and 4 final years in New York State.
https://www.holmescay.com/

THE ROYAL CANE CASK COMPANY

Independent bottler, The Royal Cane Cask Company, a division of Infinity Spirits, has released the latest offerings in their Legacy Series. The following 500 ml bottles are offered in special gift boxes:

- Caroni 1997 (Trinidad & Tobago): molasses rum from the famed distillery, which closed in 2002; 60.3% ABV (120.6 proof)
- Long Pond 2001 (Jamaica): an extended fermentation expression, from an 18th-century estate; 56.7% ABV (113.4 proof)
- Uitvlugt 'MPM' 1997 (Guyana): a Demerara single cask rum from an 18th-century distillery's historic wooden stills; 54.4% ABV (108.8 proof)
- Simon 2008 (Martinique): a pure cane juice agricole, from a benchmark AOC distillery; 54% ABV (108 proof);
- Savanna 2003 (Réunion): a slow-fermented rum, aged 16 years at origin; 56.1% ABV (112.2 proof)

https://www.royalcanerum.com/

MAURITIUS RUM GEOGRAPHICAL INDICATION

Mauritian la Gazette magazine reported that the "Rhum de Maurice" Geographical Indication (GI) is now officially established, guaranteeing the origin, quality, and traceability of every bottle, from field to bottle.
Only rums produced on the main island of Mauritius are eligible for the GI designation. Sugar cane is grown on the island's volcanic soil, and fermentation, distillation, and aging also take place there. Each step is monitored, tracked, and verified. The specifications set forth two rules:

- The use of artificial colors is strictly prohibited
- The sugar content is limited to a maximum of 20 g/L to preserve the product's natural flavor profile.

The IG brings together seven local distilleries: Distillerie de Labourdonnais, Domaine de Saint Aubin, Oxenham Craft Distillery, Medine Distillery, Rhumerie de Chamarel, Omnicane Distillery, and Grays. Each retains its own distinct character, but all are committed to adhering to the same standards and working collectively within a common framework, in accordance with a set of specifications that is protected, defined, and approved by all.
https://www.mexamauritius.org/

STADES WEST INDIES RUM DISTILLERY

Last month, Stade's West Indies Rum Distillery officially opened Kendal Farm in St John. The new facility brings together agriculture, research and rum ageing, creating opportunities for local farmers, agricultural workers and industry partners, while strengthening the island's rum sector. The project will expand Barbados' rum ageing capacity to 60,000 casks and forms part of a broader long-term investment in local expertise, infrastructure and job creation as the industry works towards a billion-dollar economic target. Addressing the gathering, Minister of Agriculture, Food and Nutritional Security Dr Shantal Munro-Knight said the ministry, along with Export Barbados, would open a world-class export pack house in the coming weeks. She said it would provide opportunities for Barbadians to export. She said they intended to continue that investment as they focused on value-added products.

THE LAST DROP DISTILLERS

Last month Sazerac's The Last Drop Distillers announced Release No. 43, a 22-year-old Barbados rum created by Foursquare Distillery owner and master distiller Richard Seale. This is the first rum in The Last Drop's Signature Creation series. It is thought that this may be the oldest expression ever released by Foursquare. Seale said the project had been in development since the early days of The Last Drop Assembly, a collective of leading distillers and blenders formed by The Last Drop. "I had this 2004 blend in mind for The Last Drop from the earliest days of my involvement with The Last Drop Assembly," Seale said in a news release. "It was a rum we believed would reward time." Bottled at 53% ABV (106 proof), the rum spent its more than two decades of maturation in Barbados, including time in ex-bourbon casks before a final three-year finish in old Port pipes. The Last Drop Distillers was founded by two icons of the spirits industry, Tom Jago and James Espey with over 80 years of experience

between them. Their aim was to curate the world's most remarkable spirits by finding treasures across aged spirit categories and sharing them with those who seek the genuinely extraordinary.
They are single-minded about their mission: to seek out and collect remarkable spirits from around the globe, unfettered by house style or spirits category. There might only be enough liquid for a handful of bottles, but this is a quest for quality over quantity.
https://lastdropdistillers.com/

LA MAISON & VELIER

For years, some of the most sought-after bottles in the La Maison & Velier history have remained entirely out of reach in the U.S., tucked away quiet and undisturbed in our European cellars. They are the kind of bottles that, until now, you only really saw in auction catalogs, private collections, or the memories of those who tasted them a decade ago. This year, LM&V will be bringing a highly curated selection of these dormant bottles across the Atlantic for what they are calling the LM&V Library Release. These are the absolute last of their kind, bottles we held back for their own archives, representing seminal moments in rum and whisky history. None of these have ever officially touched U.S. soil. This year's Library Release includes:

- Hampden Estate LROK 3 Liter Flagon - A monumental centerpiece for any serious collection, the Hampden Estate LROK "The Flagon" delivers Jamaica's iconic spirit in a massive, celebratory 3-liter format. Featuring the perfectly balanced LROK mark (200-400 gr/hLPA), this 2016 vintage was aged entirely in the Jamaican tropics for five years and bottled at47% ABV.
- Habitation Velier Distillerie de Port-au-Prince: A masterclass in Haitian craftsmanship, this expression from Distillerie de Port-au-Prince is crafted entirely from heirloom Cristalline cane grown in the rich soils of Saint Michel de l'Attalaye. the spirit undergoes a meticulous two-stage distillation in copper Müller stills before being bottled at a robust 59T ABV.
- Habitation Velier Providence 2020: - This will be the first-ever aged expression of Providence. Crafted from a unique blend of sun-drenched Cristalline juice and concentrated sugarcane syrup, this spirit's deep complexity is driven by a meticulous, dunder-bolstered fermentation. Distilled in 2020, it was matured exclusively in legendary ex-Caroni casks—creating a world-class collision of vibrant Haitian terroir and the heavy-bodied, historic influence of Trinidad's famous "lost distillery."

https://www.lmvusa.com/

BARBADOS RUM EXPERIENCE

The Barbados Rum Experience was created for those who believe a great spirit deserves more than a glass, it deserves a journey. The 6-day program opens guests to a world of rum history, production education, and cultural immersion, set against the backdrop of Barbados' world-class tourism landscape. Whether you arrive as a devoted rum enthusiast, a whiskey lover discovering something new, or a curious traveler ready for an adventure, BRE is built to deepen your understanding and elevate your appreciation of one of the world's great spirits. Expert historians, master distillers and rum academics lead sessions covering everything from Barbados' colonial history to the chemistry of the Double Pot Still. This is not a tasting tour, it's a masterclass. March 1st to 5th 2027.
https://barbadosrumexperience.com/

PUSSER'S RUM

Pusser's Rum is bringing its founding recipe back to life with a limited-edition bottling, inspired by the extraordinary story of its founder, Charles Tobias. For his most famous adventure, Charles bought a 57-foot wooden ketch and took off on a five-year, 30,000-mile voyage around the world, accompanied by a crew, a chimpanzee named Tommy and a cheetah named Fifi. It was during this epic adventure that Tobias discovered the traditional Admiralty blend of Royal Navy Rum. While docked in Gibraltar for repairs and captivated by the history behind the spirit following the Navy's 1970 "Black Tot Day" shutdown, Charles persuaded the British Admiralty to hand over the secret recipe and blending rights in 1979. To seal the deal, he pledged a share of all future profits to the Royal Navy Sailors' Fund. The new Pusser's Rum Founder's Reserve Limited Edition meticulously recreates the first rum blended by Tobias in 1979, the recipe that helped establish the brand's reputation for characterful Caribbean rum. Founder's Reserve combines Caribbean spirits from several rum-producing traditions. Its components include Demerara pot still rum from Guyana, oak-aged rums from Trinidad and Caroni, and small-batch sugarcane rum from the British Virgin Islands' historic Callwood Distillery.
https://pussersrum.com/



The Sweet Business of Sugar

THE Rum UNIVERSITY



European Union

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: October 06, 2026

Report Number: E42026-0076

Report Name: Sugar Semi-annual

Country: European Union

Post: Brussels USEU

Report Category: Sugar

Prepared By: Luigi Castaldi

Approved By: Emma Aspell

Report Highlights:

EU sugar production in MY 2026/27 is forecast to fall sharply, as a record-low planted area and a severe summer drought deliver the smallest EU crop since the end of the quota regime. Exports are expected to fall by more than half, while imports increase and stocks are drawn down to help cover the production shortfall. Consumption remains broadly stable, although a gradual structural decline continues. The Inward Processing (IP) regime, which allows duty-free imports of sugar for processing in the EU when the resulting products are re-exported, was suspended for raw cane sugar refining in May 2026 for one year, removing an important source of sugar imports for the EU market. EU prices, which fell steadily through the first half of 2026, are expected to firm as contracts for the new marketing year are negotiated against tighter supply and higher world prices.

Explanatory Notes to the Reader

- All sugar numbers are in raw sugar equivalent (RSE) unless otherwise noted.
- The Production, Supply, and Distribution tables (PS&D) in this report only pertain to sugar as defined by Harmonized System (HS) code 1701; therefore, they exclude raw beet sugar production destined for fermentation or other industrial purposes such as bioethanol production.
- The conversion factors and marketing years used in this report:
  - MY = marketing year; for sugar October/September.
  - Raw cane sugar = 1.07 X Refined cane sugar
  - Raw beet sugar = 1.087 X White (refined) beet sugar
- Sugar imports for EU inward processing (IP) purposes are included in this report's PSD tables. While raw sugar imported under IP is being re-exported as white sugar, it should be clear that processed products made using IP sugar and re-exported are included in the EU consumption line. Inward processing is the EU customs program under which the import duties for dairy, sugar, and starch containing commodities for processing and subsequent re-export are waived.
- EUR/USD exchange rate has been listed for the last 12 months.

Graph 1 – ECB Euro Reference Exchange Rate, USD/EUR, September 2025 – September 2026



Source: European Central Bank

Table 1– EU-27 Sugar Production, Supply, and Distribution (PS&D)

Sugar, Centrifugal	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
European Union	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	376	376	200	635	511	1,320
Beet Sugar Production	16,126	16,546	15,386	16,147	14,220	13,043
Cane Sugar Production	151	151	133	111	133	111
Total Sugar Production	16,277	16,697	15,519	16,258	14,353	13,154
Raw Imports	807	807	1,050	1,300	1,650	1,050
Refined Imports (Raw Val)	606	605	900	700	900	1,100
Total Imports	1,413	1,412	1,950	2,000	2,550	2,150
Total Supply	18,066	18,485	17,669	18,893	17,414	16,624
Raw Exports	8	8	8	8	8	8
Refined Exports (Raw Val)	2,058	2,042	1,250	1,765	850	650
Total Exports	2,066	2,050	1,258	1,773	858	658
Human Dom. Consumption	15,800	15,800	15,900	15,800	15,900	15,700
Total Use	15,800	15,800	15,900	15,800	15,900	15,700
Ending Stocks	200	635	511	1,320	656	266
Total Distribution	18,066	18,485	17,669	18,893	17,414	16,624

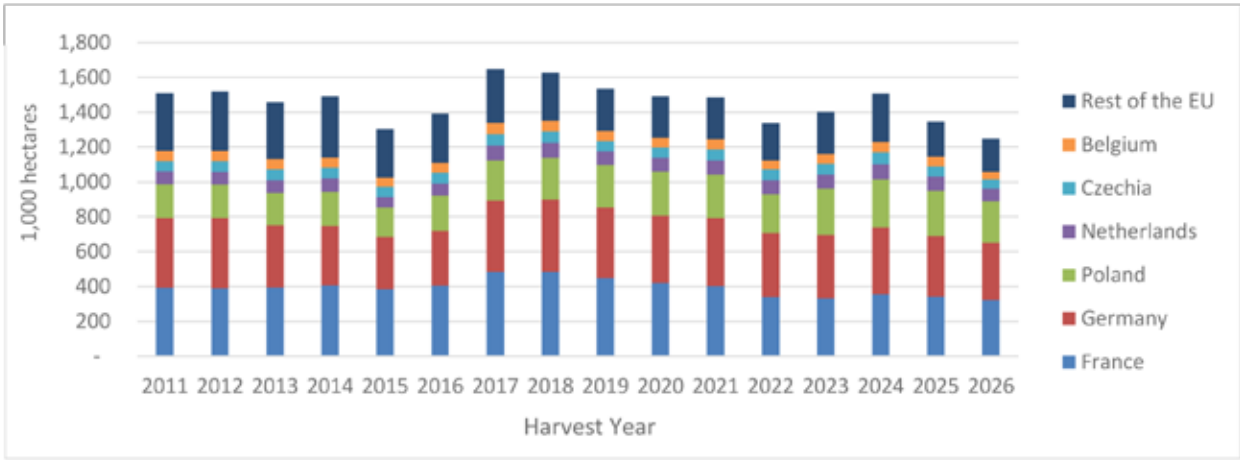
EU-27 beet sugar production for MY 2026/27 is forecast at 13.0 million metric tons (MMT), down 19 percent from MY 2025/26 and the smallest EU crop since the sugar quota system ended. Two factors caused the drop. Sugar beet area fell to around 1.25 million hectares, the lowest in the current data series, as processors cut contracted volumes and growers switched land to other crops after two years of low prices. Then a severe summer drought hit most of the growing area after planting was over, so a crop that was already going to be small lost yield on top of that.

Area fell most in the high-yielding Beet Belt. German area came down under a voluntary restriction program, and Belgian area by close to a quarter after contract cuts of 15 percent in 2025 and 25 percent in 2026. Dutch and French area both fell, Slovak area dropped by about a third after a factory closed, and Austrian area is now less than half what it was two years ago. Romania, Spain, Croatia, Finland, and Italy were the exceptions, with area steady or higher.

Growing conditions got worse from May onward, and this is the main reason for the lower forecast. France had five heatwaves in a row and a long dry spell, with early estimates pointing to a crop 20 to 30 percent below the five-year average and some fields that may not be harvested at all. Southern Germany expects output to fall by about a third. Czech and Slovak yields are well below last year's records, Hungary experienced its worst drought in decades, and Dutch yields are expected to drop sharply.

Not every region was hit. Eastern Germany reports good yields, Spanish yields should hold up because production is now concentrated in the fully irrigated north, and Romanian yields are forecast above average. In several Member States the dry, sunny weather is raising sugar content, which will make up for some of the lost root tonnage.

Graph 2 EU Sugar Beet Acreage



Source: FAS EU Posts and Eurostat data.

EU-27 beet sugar production for MY 2025/26 is estimated at 16.1 MMT, revised upward on higher-than-expected yields. Sugar beet area declined to around 1.35 million hectares following the high production levels of MY 2024/25, but the yield outcome largely offset the contraction, limiting the decline in production to around 2 percent. A warm and dry sowing window supported a long growing season, and sugar yields across Western and Central Europe were the strongest since MY 2017/18, driven more by high sugar content than by root tonnage. Several Member States in the northern Beet Belt recorded record or near-record yields, in some cases high enough to generate contract overruns, with a significant share of delivered volume paid outside contract terms. In Central Europe, phytosanitary pressure from the Syndrome Basses Richesses and Stolbur complex eased relative to recent campaigns, and both yields and sugar content recovered, although the infestation continued to spread geographically.

Looking ahead, MY 2026/27 is tighter than expected at the start of the year. Growers still face limited access to plant protection products, high input and energy costs, weak margins, and continued pest and disease pressure, all of which weighed on planting decisions. In addition, the contraction programs agreed in the core Beet Belt, which were set against low prices and high stocks, ran into a severe summer drought. Supply is now tighter than those programs were meant to deliver.

The market has also changed direction. For most of the first half of the year the main concern was import pressure and too much sugar on the market. Since then, the EU has suspended inward processing for raw cane sugar refined into white sugar, and domestic output has fallen sharply. The question now is

whether preferential suppliers and trade agreement quotas can bring in enough sugar to cover the gap. Trade policy remains a priority, but the concern has shifted from too much supply to not enough. The stocks that shaped contracting decisions a year ago are being used up.

Plant closures continue to reduce processing capacity, leaving a smaller crop to be handled by fewer factories. Where capacity has been cut faster than the crop has fallen, campaigns will run longer, which raises the risk of harvest delays and of beet quality declining before it is processed.

Table 2 – EU Sugar Beet Area Harvested by Country (MY 2024/25 – 2026/27)

Thousand hectares			
	24/25	**25/26**	**26/27e**
Austria	42.9	24.9	20.9
Belgium	58.3	55.0	42.0
Croatia	9.0	7.2	7.5
Czechia	68.9	56.3	52.8
Denmark	31.7	31.1	29.4
Finland	14.4	16.2	16.2
France	355.3	342.0	323.0
Germany	386.0	349.0	328.0
Hungary	16.1	11.5	11.3
Italy	29.2	18.7	18.7
Lithuania	16.0	14.0	13.0
Netherlands	87.6	84.6	73.5
Poland	274.3	258.4	238.0
Romania	23.0	14.3	18.5
Slovakia	23.4	18.9	12.2
Spain	43.5	20.2	20.9
Sweden	27.8	24.4	21.3
Total EU-27	**1,507.5**	**1,346.7**	**1,247.2**

Source: FAS/USEU based on data from FAS analysts in EU MS (e=estimated, f=forecast)

EU policy frameworks will remain central over the medium term. Regulation (EU) 2026/1388 on plants developed through certain new genomic techniques was adopted on June 17, 2026, and is expected to apply from mid-2028 following a 24-month transition period during which implementing rules will be developed. It is expected to support more resilient and input-efficient beet varieties over time, although no effect on plantings is expected within the forecast period. Evolving pesticide regulation and the promotion of biological alternatives continue to shape crop-protection strategies. Several Member States have increased coupled support for sugar beet or granted emergency derogations for plant protection products, reflecting the pressure on grower margins.

Cane sugar production within the EU-27 remains confined to the French outermost regions — Réunion, Guadeloupe, Martinique, and French Guiana — as the continental climate is unsuitable for sugarcane

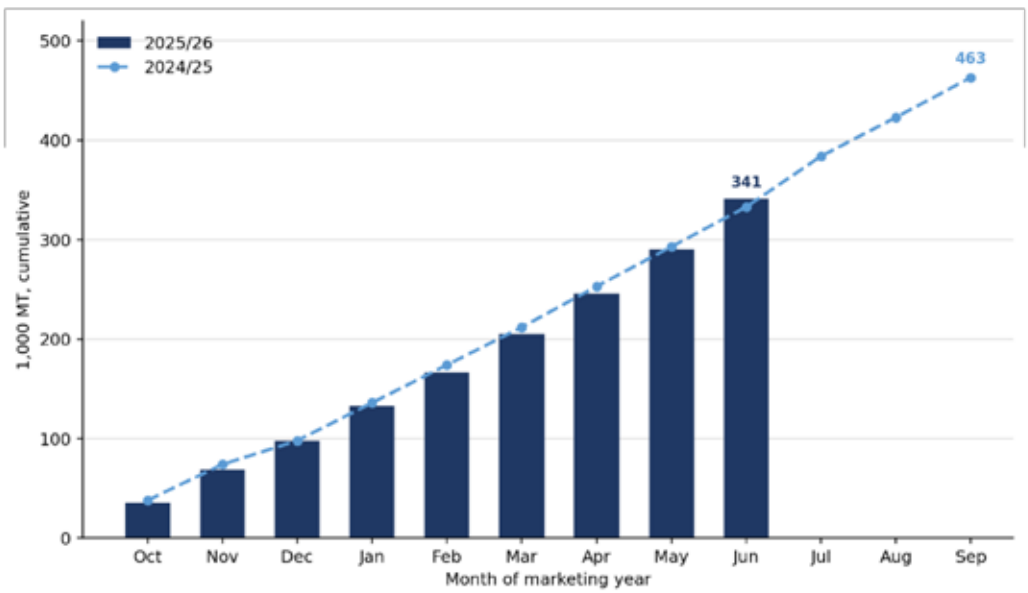
cultivation. Output is forecast at approximately 111,000 MT for MY 2026/27, unchanged from MY 2025/26 and down from 151,000 MT in MY 2024/25, a long-term decline. Although these regions account for a small share of total EU sugar output, sugarcane and rum production play a crucial role in local employment, income and community life. The sector faces growing volatility from intensifying climatic pressures, including cyclones and erratic rainfall, alongside rising production costs and a shrinking labor force. It remains increasingly reliant on the Programme of Options Specifically Relating to Remoteness and Insularity (POSEI) under the Common Agricultural Policy, which provides targeted support to offset the structural disadvantages of outermost regions, along with other CAP measures to modernize harvesting systems and adapt to a more competitive global market.

EU-27 Isoglucose Production

Isoglucose production in the EU-27 has remained relatively stable over recent marketing years. According to the European Commission's Sugar Market Situation reports and dashboard, output reached 496,000 tons in MY 2023/24, held steady at 463,000 tons in both MY 2024/25 and MY 2025/26, and is estimated at 470,000 tons for MY 2026/27.

Cumulative production through June 2026 stood at 341,000 tons, tracking the previous marketing year almost exactly (Graph 3). Monthly production fluctuates, with averages commonly below 50,000 tons, reflecting cereal prices, crop conditions, and demand for starch co-products. Belgium, Hungary, Slovakia, Germany, and France remain core producers, benefiting from starch-processing capacity, reliable wheat and maize supply, and integration with food and beverage chains. Volumes remain well below the pre-2017 production quota of about 720,000 tons, constrained by competition from sugar, health-driven sugar reduction policies, and modest external demand.

Graph 3 - EU Isoglucose Production, Cumulative by Month, MY 2025/26 and MY 2024/25



Source: European Commission

Consumption is estimated at 422,000 tons in both 2025/26 and 2026/27, with exports of around 48,000 tons and ending stocks below 20,000 tons. The slight increase in the 2026/27 production estimate comes as EU sugar output falls by 19 percent. If EU sugar prices rise as the tighter balance suggests, isoglucose margins would improve and starch processors have spare capacity available, so there is some upside to this figure, although the scale of any substitution would be limited by the small size of the sector relative to sugar.

The EU Sugar Market Observatory maintains transparency through regular reporting, increasingly cited in broader agricultural market discussions. EU-27 isoglucose output is modest but resilient, supported by processing and logistics while limited by consumption trends and regulatory and public-health pressures.

EU-27 Sugar Consumption

EU sugar consumption in MY 2025/26 is estimated at about 15.8 million tons and is forecast at 15.7 million tons in MY 2026/27, continuing a gradual structural decline over time. Long-term projections point to a modest annual decrease in overall use, driven by population trends and falling per capita intake. The MY 2026/27 figure also reflects tighter supply and firmer prices.

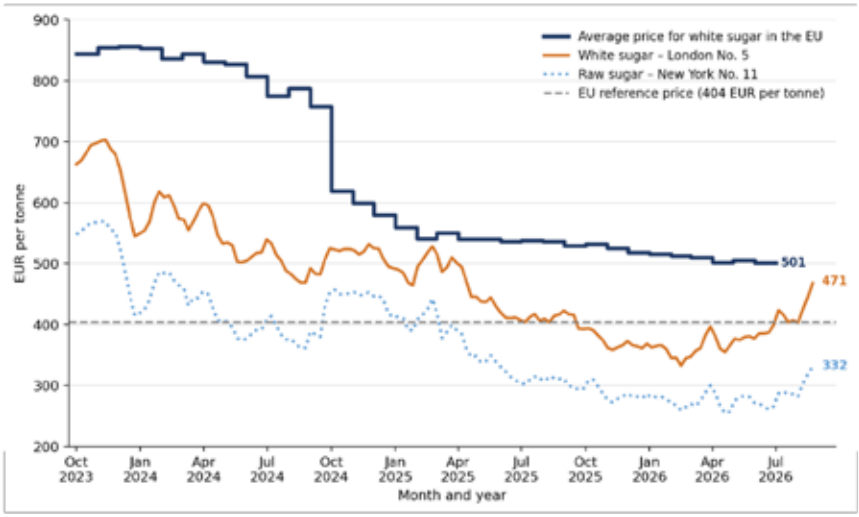
Several factors contribute to the underlying downward trajectory. National sugar and soft-drink taxes in a number of Member States, although uneven and not EU-wide, add to price signals that discourage high sugar consumption. International health policy now encourages, rather than mandates, fiscal and reformulation measures, reflecting political compromises but still supporting the direction of lower sugar use. At the same time, consumer health awareness and voluntary reformulation — such as sustained cuts in sugar content by major beverage producers — have reduced the average sugar load of products on the market and reinforced more moderate consumption patterns.

Macroeconomic conditions also play a role. Cost-of-living pressures in recent years have led some consumers to cut back on discretionary, sugar-rich products, contributing to stagnant or slightly falling demand in several segments. While total sugar use in the EU-27 remains substantial, the combination of policy measures, changing preferences, reformulation, and economic constraints points to a slow but persistent decline in consumption over the coming years.

EU-27 Sugar Prices

The average price for white sugar in the EU declined steadily over the past year, reaching 501 EUR per tonne in June 2026, 35 EUR per tonne below a year earlier and the lowest level since autumn 2022, before prices peaked above 850 EUR per tonne in 2023 (Graph 4, blue line). The decline reflects a large MY 2025/26 crop, high stocks, and a rising inflow of duty-free raw sugar under the inward processing regime, which was suspended in late May 2026. EU prices nevertheless remain about a quarter above the 404 EUR per tonne EU reference price (grey dashed line) and well above pre-2022 levels.

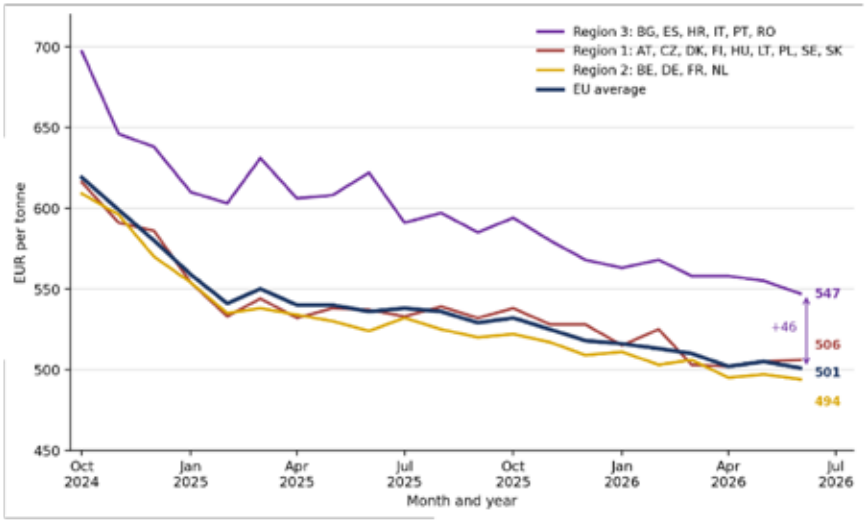
Graph 4 - EU and World Market Prices for Sugar, October 2023 – August 2026



Source: European Commission. World prices are weekly averages of daily futures.

Regional prices have converged (Graph 5). Region 2, covering the main surplus-producing Member States (BE, DE, FR, NL), fell to 494 EUR per tonne in June 2026, the lowest in the Union, where the high-yielding MY 2025/26 crop was concentrated. Region 1 stood at 506 EUR per tonne. Deficit areas in Region 3 (including Italy and Spain) recorded 547 EUR per tonne, a premium of 46 EUR per tonne over the EU average. This premium is expected to widen in MY 2026/27, as the refineries supplying these areas lose access to duty-free raw sugar under the suspended inward processing regime.

Graph 5 - EU and Regional Prices for White Sugar, October 2024 – June 2026

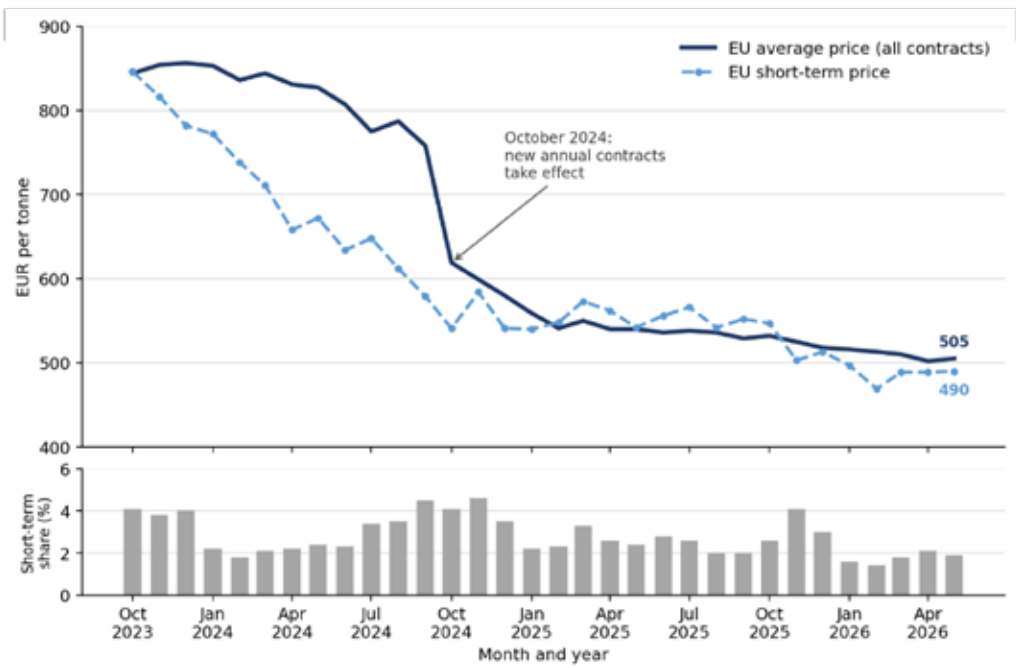


Source: European Commission, MS notifications

The world market turned sharply in August 2026 (Graph 3). Between late July and August 21, London white sugar futures (red line) rose 19.7 percent to 551.6 USD per tonne (471.5 EUR), and New York raw sugar (blue dotted line) rose 19.2 percent to 17.6 cents per pound (331.9 EUR per tonne), taking the world white price back above the level of the EU reference price for the first time in over a year. The white sugar premium stood at 163.4 USD per tonne, a historically wide margin that points to tightness in refined sugar supply. The gap between EU and world prices narrowed to around 30 EUR per tonne, the smallest since 2022, so EU prices are again directly exposed to world market movements. The stronger euro, at 1.17 USD on August 21 against 1.14 a month earlier, absorbed part of the rise in euro terms.

Price transmission into the EU market is slow. Only around 2 percent of EU sugar is sold through short-term contracts (Graph 6); the rest moves on annual contracts. Short-term prices usually move first and the overall average follows: in 2022–23 short-term prices ran well above the average before it caught up, and since late 2025 they have run below it, at 490 EUR per tonne against an average of 505 in May 2026. The same lag is visible in Graph 3. World prices fell from late 2023 but the EU average dropped mainly in October 2024, when new annual contracts took effect. Reported prices are therefore expected to stay near current levels for another one or two months. From MY 2026/27 contracting round onward, prices are expected to firm, as contracts are negotiated against a 19 percent smaller crop, a closed inward processing channel and a stronger world market. A return to the 2023 peaks is not anticipated, given large carry-in stocks and available preferential import channels. The main downside risk is a renewed fall in world prices during the Brazilian harvest.

Graph 6 – EU Average and Short-Term Prices for White Sugar, October 2023 – May 2026



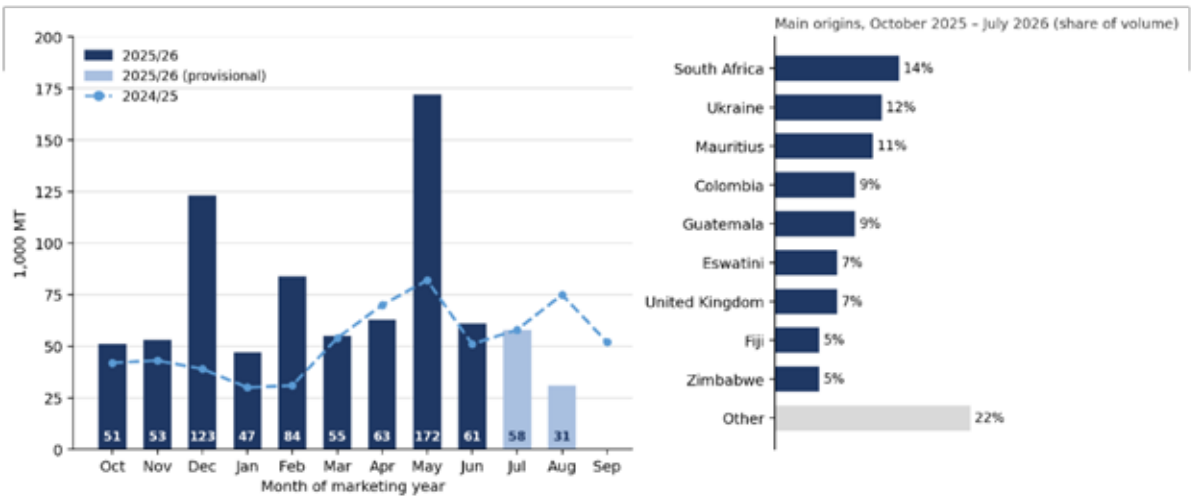
Source: European Commission, MS notifications

EU-27 Sugar Trade
Imports

EU-27 sugar imports are forecast at around 2.2 million tonnes in MY 2026/27, up from an estimated 2.0 million tonnes in MY 2025/26 and 1.4 million tonnes in MY 2024/25. The increase is needed to cover a 19 percent fall in domestic production. It comes at a time when the main channel that supplied the EU with duty-free raw sugar in the past two years, the Inward Processing (IP) regime, has been suspended for raw cane sugar refining.

In the first ten months of MY 2025/26, imports under the normal regime reached 768,000 tonnes, and by the end of August they had passed the full MY 2024/25 total by around 28 percent (Graph 7). The monthly pattern was uneven, with a peak of 172,000 tonnes in May 2026, driven largely by preferential raw sugar arrivals from EPA and EBA countries, followed by much lower volumes in July and August. Under the normal regime, South Africa (14 percent), Ukraine (12 percent) and Mauritius (11 percent) were the main origins, followed by Colombia, Guatemala, Eswatini and the United Kingdom.

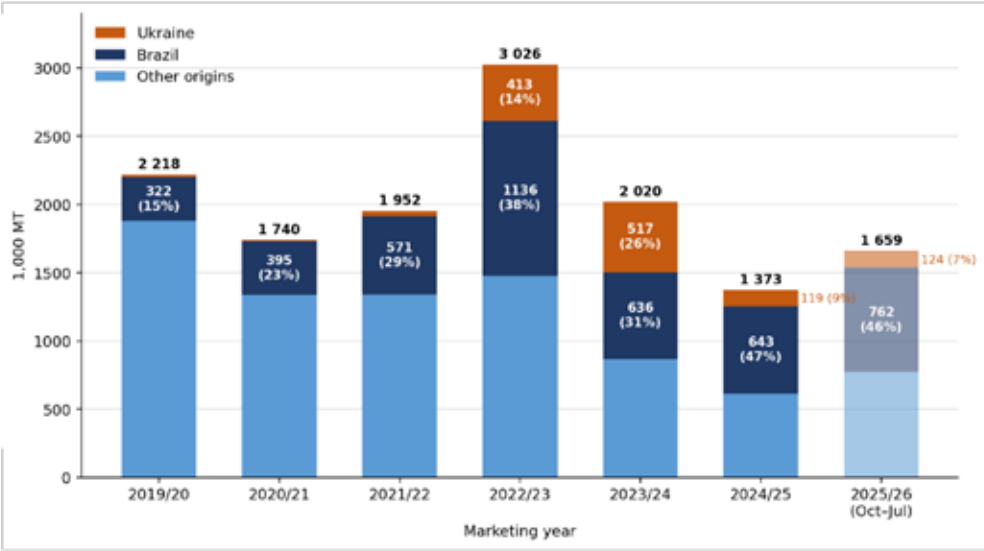
Graph 7 – EU Monthly Sugar Imports (CN 1701) and Main Origins, Normal Regime, MY 2025/26



Source: European Commission

Across all customs regimes, including inward processing, however, the largest supplier by far is Brazil (Graph 8). Brazil accounted for 47 percent of EU sugar imports in MY 2024/25 and 46 percent between October 2025 and July 2026. Ukraine's role changed sharply over the same period. Under the Autonomous Trade Measures (ATMs), introduced by the EU to support Ukraine after Russia's invasion by removing tariffs and quotas, imports from Ukraine rose to 413,000 tonnes in MY 2022/23 and 517,000 tonnes in MY 2023/24, a quarter of all EU sugar imports. The EU activated the ATM emergency brake in mid-2024, and imports from Ukraine fell to 119,000 tonnes in MY 2024/25. Since October 2025, Ukraine has supplied the EU under the revised EU-Ukraine trade agreement, with a duty-free quota of 100,000 tonnes a year, of which 77,000 tonnes had been allocated by late August 2026.

Graph 8 – EU Sugar Imports from Ukraine, Brazil and rest of the World (1,000 MT, Raw Value)

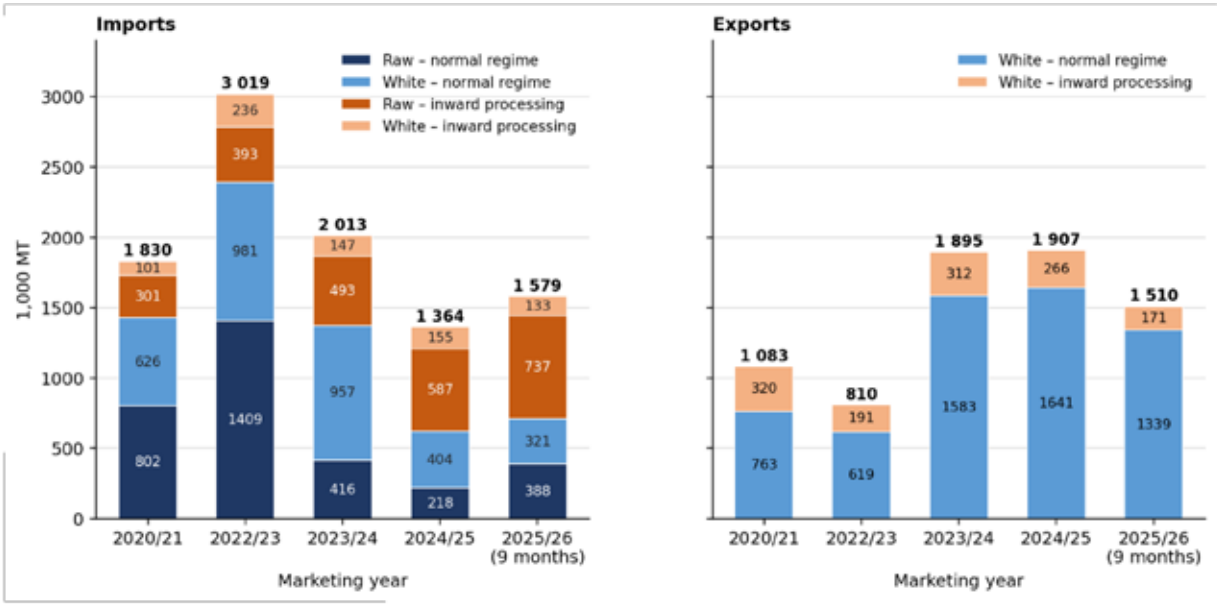


Source: TDM

Brazilian sugar entered the EU almost entirely through the IP regime, which allows sugar to be imported duty-free for processing into products that are then re-exported. Brazil accounted for only 2 percent of imports under the normal regime, and its WTO quota of 289,000 tonnes at a reduced duty went unused. IP imports grew quickly: in the first nine months of MY 2025/26 they reached 870,000 tonnes, including 737,000 tonnes of raw sugar, already more than the 587,000 tonnes of raw sugar imported under IP in the whole of MY 2024/25 (Graph 9). These imports were not matched by identifiable re-exports. White sugar exports under IP fell to 171,000 tonnes in the same nine months, against 266,000 tonnes in MY 2024/25. Some IP sugar may have left the EU inside processed products such as confectionery, which do not appear in sugar trade statistics, but the size of the gap led producers to argue that low-priced imports were adding to domestic supply, weighing on EU prices and weakening the protection offered by EU tariffs.

After Agriculture Commissioner Christophe Hansen announced the intention to act in January 2026, the Commission adopted Implementing Regulation (EU) 2026/1124, which suspends IP for raw cane sugar refined into white sugar from May 27, 2026, for one year. Existing authorizations were given a 30-day transition, and the Commission will review the effect of the measure after six months, by the end of November 2026. The effect is already visible in the origin data: imports from Brazil reached 268,000 tonnes in June 2026, before the transition ended, then fell to under 7,000 tonnes in July. The suspension closes the main source of low-cost raw sugar for refineries in Portugal, Spain and Italy for almost all of MY 2026/27.

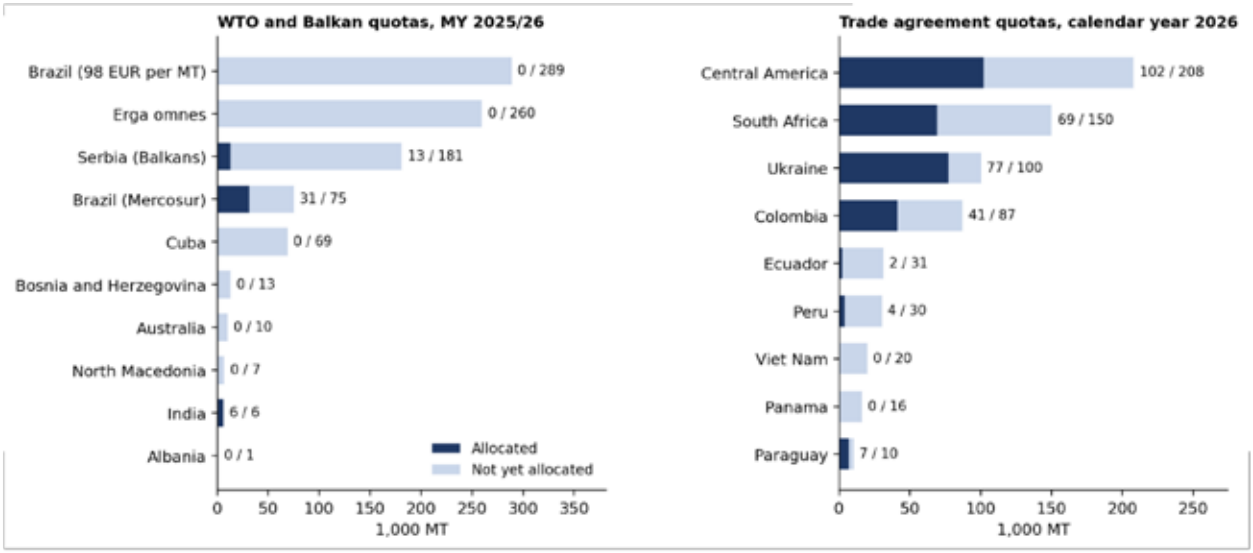
Graph 9 – EU Sugar Imports and Exports by Regime (Normal and Inward Processing)



Source: European Commission

Other import channels will need to cover the gap. With IP closed, the roughly 0.9 million tonnes it supplied in MY 2025/26 must be replaced, on top of the additional imports needed to cover lower production, meaning that preferential, trade agreement and WTO quota imports would need to roughly double. Imports from African, Caribbean and Pacific (ACP) countries and Least Developed Countries under EPA and EBA arrangements recovered in MY 2025/26, reaching 254,000 tonnes by late August against 145,000 tonnes a year earlier, mainly from Mauritius, Eswatini, Fiji and Zimbabwe, and mainly destined for Portugal, Italy and Spain. Use of tariff-rate quotas has been uneven (Graph 10). By late August, about half of the 2026 duty-free quotas under trade agreements had been allocated: Central America 102,000 of 208,000 tonnes, South Africa 69,000 of 150,000 tonnes and Colombia 41,000 of 87,000 tonnes, with Ukraine further ahead at 77,000 of 100,000 tonnes. WTO quotas, which carry an in-quota duty, remain largely unused, with 37,000 of 709,000 tonnes allocated in MY 2025/26. The EU-Mercosur interim trade agreement has applied provisionally since May 1, 2026, with duty-free quotas of 180,000 tonnes a year of Brazilian raw sugar for refining and 10,000 tonnes for Paraguay; by late August, 31,000 tonnes of the Brazilian quota available for MY 2025/26 had been allocated. With IP closed, this quota and the WTO quotas are now the main routes for Brazilian sugar into the EU. The EU-Australia agreement concluded in March 2026 adds 35,000 tonnes of duty-free raw sugar for refining, conditional on Bonsucro certification, but it is not yet in force. Whether the EU can import around 2.2 million tonnes in MY 2026/27 will depend largely on the WTO quotas, which only become economic if EU prices rise and world prices stay close to current levels.

Graph 10– EU Sugar TRQs and Use (MY 2025/26 and 2026)



Source: European Commission

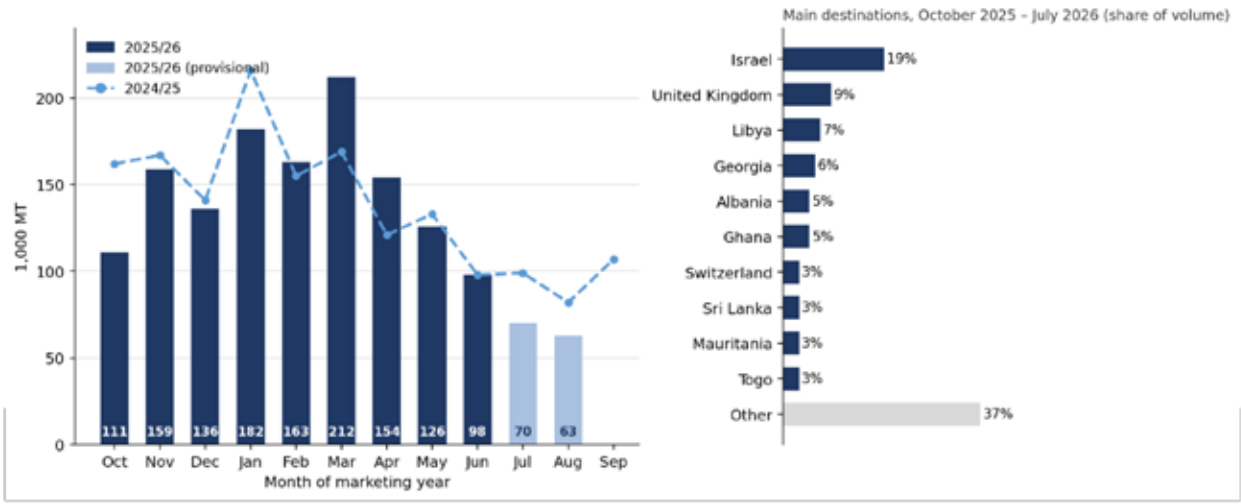
Since the UK's withdrawal from the EU, bilateral sugar trade has continued under duty-free access in the Trade and Cooperation Agreement, although rules of origin limit re-exports of refined sugar made from imported raw sugar. The UK supplied 7 percent of EU imports under the normal regime in MY 2025/26 and was the second-largest destination for EU exports. Both the EU and the UK compete for the same preferential ACP and LDC supplies.

Exports

EU-27 sugar exports are forecast to fall to around 0.7 million tonnes in MY 2026/27, less than half the estimated 1.8 million tonnes of MY 2025/26 and the lowest level in recent years. Exports reached about 2.0 million tonnes in MY 2024/25. The fall reflects the 19 percent smaller crop and the end of most re-exports under inward processing following the suspension. It comes at a time when world white sugar prices are well above raw sugar prices, so the EU is leaving the export market just as export margins are improving.

In MY 2025/26, monthly exports were strong in the first half of the year, rising from 111,000 tonnes in October to a peak of 212,000 tonnes in March 2026, then falling to 98,000 tonnes in June and around 65,000 to 70,000 tonnes a month in July and August (Graph 11). By the end of August, cumulative exports reached 1.48 million tonnes, compared with 1.65 million tonnes for the full MY 2024/25. Exports under the inward processing regime, which are refined sugar made from imported raw sugar, fell to 171,000 tonnes in the first nine months of MY 2025/26, from 266,000 tonnes in the whole of MY 2024/25 (Graph 9).

Graph 11 – EU Monthly Sugar Exports (CN 1701) and Main Destinations, MY 2024/25 and 2025/26

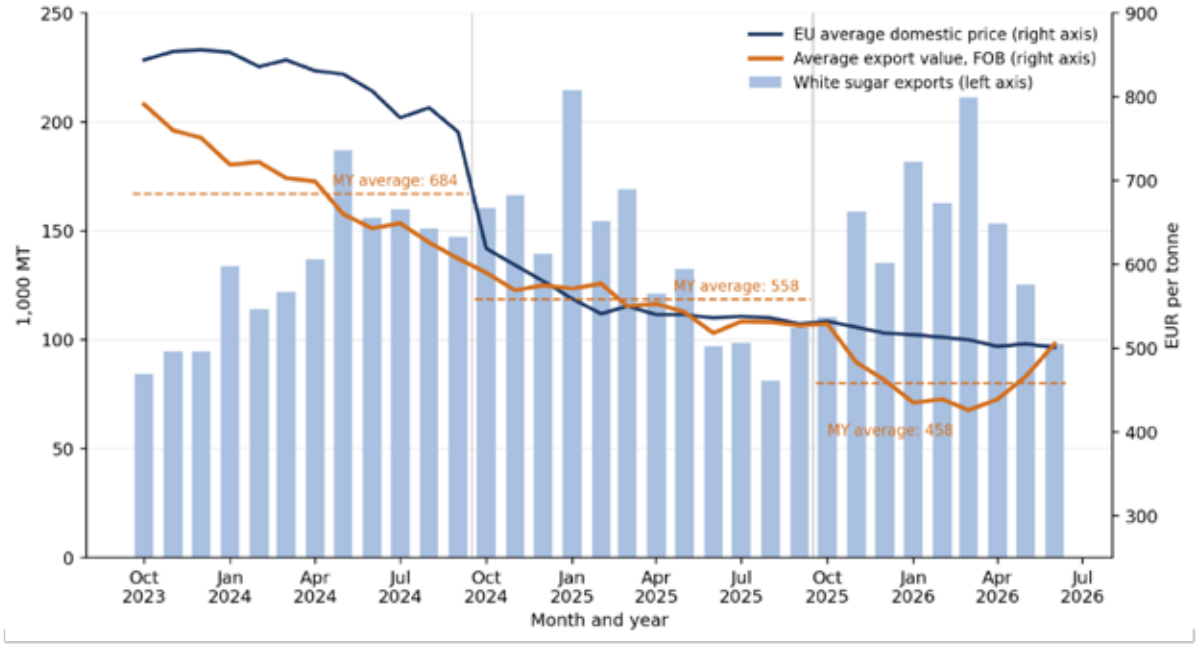


Source: European Commission

Israel remained the largest destination, with 19 percent of exports in the first ten months of MY 2025/26, followed by the United Kingdom (9 percent), Libya (7 percent), Georgia (6 percent), and Albania and Ghana (5 percent each). Switzerland, Sri Lanka, Mauritania, Togo, South Africa and Tunisia each accounted for around 3 percent. EU exports remain geographically diversified, but with much lower volumes expected in MY 2026/27, several regular destinations are likely to turn to other suppliers.

Export volumes stayed high in MY 2025/26, but only because EU processors accepted much lower prices (Graph 12). With a large crop and cheap imports under inward processing, the EU had more sugar than its market could use, so processors sold the surplus abroad even at a loss compared with home prices. The average export value of white sugar fell to 458 EUR per tonne, from 558 EUR per tonne in MY 2024/25 and 684 EUR per tonne in MY 2023/24. From November 2025 to May 2026, export values were well below the average EU domestic price. With the world price rally, export values rose sharply from April 2026 and reached the level of the domestic price in June. In MY 2026/27, the EU will have little surplus to sell at these better prices, and any recovery in exports will depend on a rebound in beet area and yields.

Graph 12 – EU White Sugar Exports: Volume, Average Export Value and EU Domestic Price, MY 2023/24 – 2025/26



Source: European Commission

EU-27 Sugar Stocks

EU-27 sugar stocks are estimated to have risen sharply in MY 2025/26, to about 1.3 million tonnes, up from 0.6 million tonnes in MY 2024/25. The increase reflects a large crop driven by high yields, strong imports under the inward processing regime, and lower exports. This surplus is the main reason EU prices continued to fall through the first half of 2026.

In MY 2026/27, stocks are forecast to fall to about 0.3 million tonnes, as they are used to cover the 19 percent drop in domestic production. With inward processing suspended and exports sharply lower, stocks are the main buffer between a much smaller crop and domestic demand. Most of the sugar stored in the high-yield year will therefore be used within twelve months, leaving the EU with limited room to absorb another poor harvest or a delay in imports.

EU-27 Sugar Policy

Common Agricultural Policy (CAP)

On May 14, 2025, the European Commission published a proposal to simplify the Common Agricultural Policy (CAP). The CAP is the EU's main agricultural support framework, renewed every seven years, providing income support to farmers, funding rural development, and regulating agricultural markets across Member States. The simplification was driven by widespread farmer protests over excessive red tape and administrative burden. The proposed measures target the administrative burden, controls, implementation of the CAP as well as the CAP crisis management tools. Notably, the proposal simplifies environmental requirements (GAECs for good agro-environmental conditions) linked to eco-payments for farmers. The proposal was adopted by the co-legislators in December 2025, published as Regulation (EU) 2025/2649, and entered into force on January 1, 2026.

On July 16, 2025, the European Commission unveiled the much-anticipated plan for the next CAP as part of its 2028–2034 EU budget. The proposal marks a major reform, scrapping the CAP's two-pillar structure and merging farm funding into broader National and Regional Partnership Plans. The new CAP aims to prioritize performance-based spending, tighter targeting of income support, and greater Member State control. While environmental objectives remain, implementation would shift largely to national discretion. The proposal is currently going through the EU legislative process: the European Parliament adopted its negotiating position on the EU budget in April 2026, and negotiations with the Council are ongoing, with a political agreement targeted by the end of 2026.

More information in GAIN report: European Commission Unveils CAP Reform with Budget Cut and Structural Change.

Private Storage Aid

EU Delegated Regulation 2016/1238 lays down common eligibility rules for private storage aid for certain agricultural products including sugar. Only white sugar in crystal form in bulk or in big bags of 800 kg or more showing the net weight and with a moisture content not exceeding 0.06 percent is eligible.

Marketing Standards for Sugar

Directive 2001/111/EC defines common rules for certain sugars intended for human consumption, in compliance with the general legislation applicable to foodstuffs. These rules concern the composition, sales name, labeling, and presentation of foodstuffs.

EU Omnibus on Food and Feed Safety

On December 16, 2025, the European Commission published its draft Food & Feed Omnibus proposal amending, amongst others, Regulation (EC) No 396/2005 on Maximum Residue Levels (MRLs). In the proposal, the Commission seeks to set residue levels for non-EU-approved pesticides at the "limit of quantification," effectively a zero-tolerance level, which could impact U.S. exports to the EU. The publication of this proposal initiated the beginning of the legislative process. The European Parliament and the Council of the European Union, as co-legislators, will now assess the Commission's legislative proposal. Amendments to the legislative proposal will be made separately by the Parliament and Council; however, negotiations will eventually occur to find institutional agreement before the proposals are adopted as official EU law.

Trade/Tariffs

EU Free Trade Agreements (FTAs)

The EU is negotiating and has implemented several FTAs with other countries and regions, which include concessions on sugar. Additional information is available on the website of the EC at: https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/.

New Zealand: On May 1, 2024, the trade agreement between the European Union and New Zealand entered into force. The trade agreement removes all tariffs at entry into force on EU agri-food exports to New Zealand and for most New-Zealand agri-food exports to the EU, including sugar which will be tariff free as of January 1 of year 5 of the agreement. More information about the agreement can be found here.

Mexico: On January 17, 2025, the EU and Mexico announced the conclusion of a new Free Trade Agreement (the Modernized Global Agreement), signed in May 2026 and expected to enter into force by the end of 2026. The agreement abolishes customs duties for most goods, including agricultural products. The agreement abolishes customs duties for imports of some sugar and sugar products into Mexico. Under the agreement, 30,000 tons of Mexican sugar for refining can enter the EU market with an in-quota tariff rate of EUR 49 per MT as of year 3 of the agreement (10,000 MT year 1 and 20,000 MT year 2). 500 MT of specialty sugars and 1,000 MT of other sugars from Mexico will also be able to enter the EU tariff-free annually. More information about the agreement can be found here.

Mercosur: On December 6, 2024, the European Commission announced that the EU and the four Mercosur countries (Brazil, Argentina, Paraguay, and Uruguay) finalized negotiations and reached a political agreement for an EU-Mercosur partnership agreement. In 2019, the European Commission reached a preliminary agreement with Mercosur countries, but amendments were made to several sectors, including agriculture. The agreement includes a bilateral safeguard clause in case increased imports cause - or even threaten to cause - serious injury to relevant sectors, including agricultural sectors. This safeguard clause also covers imports under tariff rate quotas (TRQs) in the agreement. The iTA entered into provisional application on May 1, 2026, while formal entry into force still requires European Parliament consent; the agreement is currently undergoing legal review by the European Court

of Justice following a referral from the Parliament. Under the agreement, there is a gradual phase out duties on 91 percent of EU exports to Mercosur and 92 percent of Mercosur exports to the EU. Regarding sugar in the EU-Mercosur agreement, no new sugar quota will be created for Brazil. With the agreement, 180,000 tons of Brazilian raw cane sugar for refining will be allowed into the EU duty-free under an existing quota. For Paraguay, a new duty-free quota of 10,000 tons was agreed upon. Specialty sugars are excluded from the agreement. More information about the agreement can be found here. The EU sugar sector, represented by the International Confederation of European Beet Growers (CIBE) and the European Association of Sugar Manufacturers (CEFS), expressed strong concerns about the agreement. They described it as unbalanced for EU farmers, particularly sugar beet growers, arguing that it threatens the sector's future, undermines the EU's high production standards, and fails to ensure a level playing field. The organizations also criticized the timing of the agreement, noting that it coincides with a proposed post-2027 Common Agricultural Policy (CAP) budget that they view as weakening EU farmers, while competitors such as the United States continue to provide record levels of support. CIBE and CEFS called on the Council and Parliament to reject the agreement and defend a sustainable and competitive future for European agriculture.

India: On January 27, 2026, the EU and India concluded negotiations for a historic Free Trade Agreement (FTA). The EU will maintain its current tariffs on sensitive products including sugar. More information on the agreement can be found here.

Indonesia: The European Union and Indonesia concluded negotiations for a Comprehensive Economic Partnership Agreement (CEPA) in September 2025, although it still awaits ratification. The agreement will liberalize many agri-food sectors for EU exporters, but critically, it provides protection for sensitive Indonesian agricultural products. Specifically, sugar is among the sensitive products for which existing EU tariffs are maintained, with any access to the EU market for Indonesian sugar being strictly limited through carefully managed quotas.

Australia: On March 24, 2026, the EU and Australia concluded negotiations on a free trade agreement, with entry into force anticipated in late 2027. The deal eliminates tariffs on 98 percent of Australian goods entering the EU and is expected to add around $7 billion annually to the Australian economy. In sugar, the agreement grants duty-free access for 44,925 tonnes of Australian raw cane sugar for refining. This includes a new 35,000-tonne quota phased in over three years, added to the existing 9,925-tonne World Trade Organization allocation.

EU-Ukraine Trade Relationship

The European Union granted Ukraine a temporary liberalization of trade with its Autonomous Trade Measures (ATMs) Regulation, which was in effect from June 4, 2022, until June 5, 2025. This regulation suspended import duties, quotas, and trade defense measures on Ukrainian exports to the EU, providing significant economic support during the Russia-Ukraine war.

Between June 6 and October 29, 2025, the EU-Ukraine trade relationship reverted to the 2014 Deep and Comprehensive Free Trade Area (DCFTA) via Regulation 1132/2025 reintroducing import quotas on Ukrainian agricultural goods.

On October 29, 2025, the revised EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA) entered into force (Regulation (EU) 2025/2199). The new DCFTA updates the original agreement from 2014. The revised DCFTA increases market access in both directions compared to the 2014 agreement, but limits EU imports of sensitive agricultural products compared to the levels under the ATMs. It also enshrines a new safeguard clause and provides for the alignment of Ukrainian and EU production standards. Calendar year (CY) 2025 TRQs are applied proportionally from June 6 to December 31, 2025, to the amount of 7/12 of the annual TRQ volumes. For more information, please see GAIN Report European Union Revises Import Quotas for Agricultural Products from Ukraine.

Table 3 TRQs for Ukraine as of October 29, 2025

Product	Annual Quantity (MT)	Quantity (MT) Jun 6, 2025 to Dec 31, 2025	Period
Sugars	100,000 MT	58,333 MT	Jan-Dec
Other sugars	30,000 MT	17,500 MT	Jan-Dec
Sugar processed products and sugar syrups	7,500 MT	4,375 MT	Jan-Dec

EU Tariff Reductions Under EU-US Trade Deal

On June 30, 2026, the EU published Regulation (EU) 2026/1455 on the adjustment of customs duties on the import of certain goods originating in the United States of America in the Official Journal. This Regulation entered into force on July 1, 2026. The Regulation will cease to apply on December 31, 2029, but the text foresees an extension of the period of application following a comprehensive assessment of the effects of this Regulation that the Commission shall publish by June 30, 2029. Regulation 2026/1455 implements the U.S.-EU Framework Agreement of Reciprocal, Fair, and Balanced Trade by eliminating tariffs on most U.S. industrial goods and on a basket of agricultural goods. In addition, this regulation creates 20 new tariff rate quotas (TRQs) for agricultural products, including:

- 250,000 MT food preparations of Chapter 21 including "flavored or colored sugar syrups (excluding isoglucose, lactose, glucose and maltodextrin syrups)" – CN Code 2106 90 59

For more information, please see GAIN report: Tariff Implementation of US-EU Agreement.

EU-UK Trade Relationship

Following the exit of the United Kingdom from the European Union, the EU and the UK agreed on duty-free trade for sugar originating from each other.

The UK government published its post-Brexit tariff schedule that applies as of January 1, 2021. The MFN tariff for refined sugar is £350/MT (€419/MT, $449/MT), while the MFN tariff for raw sugar for refining carries a £280/MT (€339/MT, $364/MT) duty. To manage overall sugar volume and support its domestic industry, the UK introduced an Autonomous Tariff Quota (ATQ) specifically for raw cane sugar. This quota allows 260,000 tons of raw cane sugar to enter the UK market at a 0 percent duty rate each year. This quota system is currently under review by the UK government, considering factors like global sugar prices and domestic production. Information on the TRQs that the UK operates is available online.

Pesticides Policy

Plant protection products (PPPs), along with Maximum Residue Limits (MRLs) and import tolerances, are an increasingly important issue in the EU since there is a significant reduction in the number of active substances approved for use. Regulation (EC) No 1107/2009 and Regulation (EC) No 396/2005 regulate PPPs and set MRLs, respectively. There is a regular review of active substances whose approval is up for renewal, as well as their associated MRLs. Existing MRLs are also being reviewed through a process known as an "Article 12" review. The Commission maintains a list indicating the upcoming MRL reviews under this Article 12 process. It is important to note that this list is not all-inclusive. Stakeholders are encouraged to actively engage early on in these review processes by reaching out to the applicant. Together with the applicant, they can ensure that the necessary data is available for review or that trials for data collection are in progress or should be initiated, especially if the substance is not used or authorized in the EU. Stakeholders are encouraged to engage with FAS on substances and MRLs of importance to their commodities.

EU Restrictions on the Use of Neonicotinoids

The EU has prohibited the use of three neonicotinoids (clothianidin, imidacloprid, and thiamethoxam) except for their application in permanent greenhouses since 2018, while a fourth (thiacloprid) was banned in 2020. Due to the EU's restrictions on outdoor uses, the registrants withdrew their applications for the renewal of the approval of both clothianidin and thiamethoxam and the EU approval expired in 2019. These neonicotinoid pesticides are important for sugar beet production because they are used to prevent aphid infestations. Aphids spread viruses including the Beet Yellows Virus (BYV), which can significantly reduce yields. On January 19, 2023, the European Court of Justice ruled against the possibility for Member States to grant temporary emergency authorizations for the use of the banned neonicotinoids. Following the phasing out of neonicotinoids, Commission Regulation (EU) 2023/334 reduced the EU maximum residue limits (MRLs) for clothianidin and thiamethoxam to the limit of determination (LOD) effective March 7, 2026. Imported products can no longer contain residues of

these two substances. The reduction is based on an interest in protecting pollinators in countries outside the EU and is not related to food safety concerns.

Glyphosate

Commission Implementing Regulation (EU) 2023/2660 renewed the approval of the active substance glyphosate for 10 years, until December 15, 2033. The renewal is subject to certain new conditions and restrictions, such as the prohibition of pre-harvest use as a desiccant and the need for certain measures to protect non-target organisms. The placing on the market of plant protection products containing the active substance remains under the responsibility of Member States.

Agricultural Biotechnology – Innovative Technologies

Regulating genetically engineered (GE) organisms in the EU falls under Regulation (EC) No 1829/2003 and Directive 2001/18/EC. However, GE crop cultivation remains highly limited. The only GE crop approved for cultivation is corn MON 810, which is grown exclusively in Spain and Portugal, accounting for just one percent of the total EU corn area. Additionally, since 2015, nineteen EU countries have opted out of GE crop cultivation under Directive (EU) 2015/41218. For the import, distribution, or processing of GE crops, Regulation (EC) 1829/200319 outlines the authorization process. Imported GE crops are predominantly used as animal feed, which must be labeled as "contains GE products".

New Genomic Techniques

For plants obtained using genome editing and other new genomic techniques (NGTs), Regulation (EU) 2026/1388 entered into force on July 16, 2026, and will apply from July 17, 2028, following a two-year implementation phase during which the Commission develops the necessary secondary legislation and verification systems. The new legislation creates two categories: Category 1 plants, which meet criteria for equivalence to conventionally bred varieties and follow a simplified verification procedure, and Category 2 plants, which remain under the GMO framework with some adaptations.

The Commission opened two calls for evidence, both closed on September 28, 2026, to gather input before drafting the secondary legislation that will make the regulation operational. The first will feed into an implementing regulation on the information operators must provide to demonstrate NGT status and, for category 1, equivalence to conventional varieties. The second covered the information required for the risk assessment and authorization of category 2 NGT plants and products before their environmental release or placement on the market. The Commission plans to adopt the resulting implementing regulation in the first quarter of 2028.

Once these rules apply, products from third countries will be subject to the same verification requirements. Until the regulation applies, plants obtained by targeted mutagenesis and cisgenesis continue to fall under existing GMO legislation. For the sugar sector, the framework is expected to support beet varieties with better tolerance to virus yellows, but it will have no effect on plantings within the forecast period.

2027 Schedule Coming soon!



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The Rum Is Aged, Now What?



Of all the aging and blending methods in the rum industry, Soleras are the least understood and hence the most misused. The term "Solera" refers to a method developed in Spain for the aging and blending of Sherry. The goal of a Solera system is to eliminate differences between barrels, as well as, within distillation batches. This process will ensure that the final product is as consistent as possible over many years. For more information about Soleras, please refer to Lesson 5 of "The Classifications of Rum," available from The Rum University's website (www.RumUniversity.com).

A true Solera has both a physical ordering of barrels (stacked in reverse chronological order, with the barrels containing the youngest spirits on top and the oldest on the bottom) and a blending method (via which aged product is taken out of the bottom barrels only, and then the barrels are refilled with the contents of those barrels above them). While it is true that the physical arrangement is not necessary in order to conduct the blending, any deviation from the standard process may result in a dilution of the authenticity of the Solera.

The main abuse of the Solera nomenclature in the rum industry comes from the fact that in true Soleras, the oldest barrels should not be completely emptied during bottling: one always leaves some of the old rum behind, to ensure its characteristics will be blended with those of the younger rums in future batches. In reality, however, most rum producers completely empty their barrels into mixing tanks and are happy to call the final blend a Solera.



Rum barrels patiently aging their contents

The term “Single Barrel,” while not abused as much as the term “Solera” is still susceptible to misuse. In the truest sense of the expression, Single Barrel rums must come from individually-identified barrels, each bottle having on the label both a Bottle Number and a Barrel Number. As a result, veritable Single Barrel rums will have slight differences between barrels and between years, which increases their desirability and collectability. In reality, however, producers are so focused on consistency that they blend hundreds, even thousands of barrels together, to even out their differences, and then re-cask the resulting blend for weeks or months prior to bottling the resulting rum under the guise of a Single Barrel.

Specialty barrels are becoming more and more common in the rum industry, these include Port, Sherry, Cognac, Whisky and barrels previously used in the aging of other alcoholic beverages (fortified or not), including beer! In an increasingly-competitive world where every marketer is vying for consumer attention, this practice of using specialty barrels is allowing for veritable differentiators to emerge among producers. Only time will tell if the trend has legs or if it is transient.

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

New Coffee Shop

A new coffee shop opened near my home in Punta Arenas, it is called Körner Coffee & Bar. Their business model is very innovative: they open up early in the mornings as a very original coffee shop, and then as a bar during the evening and night, with an ample menu of expected offerings.

They still hadn't explored the possibility of having an outdoor sitting/terrace, as a smoking area. I boldly reached out to them through social media channels, to ask about this possibility, on those sunny/pleasant days. I further explained that I was preparing the pairing and that I needed to finish it before the end of the month. They promptly replied that upon receiving a notice from me, they would set up a table outside for me, so I proceeded to schedule my visit for that same day in the afternoon.

I then had to decide which cigar to select. As we know very well by now, if we make a pairing with coffee and rum, as a hot beverage similar to Irish Coffee, then the cigar must have a short format, such that the smoking time matches the time required to enjoy the beverage before it gets cold. On this occasion, I was also prepared, just in case they could prepare me a classic cocktail with a rum twist, so I took a larger, longer-smoking cigar.

And thus, as I arrived and spoked with the bartender, we agreed on an Old Fashioned made with Ron Selección de Maestro, from Havana Club. The preparation would differ slightly from the traditional method: instead of using brown sugar mixed with Angostura Bitters, we would replace the bitters with a touch of espresso, making a syrup laden with heavy coffee notes, to coat the inside walls of the glass. The rest of the preparation is more traditional, adding 2 ounces of rum, ice and an orange peel garnish, to obtain



Photos credit: @Cigarili



Photo credit: @Cigarili

the fresh citric hints, finished with a touch of soda water.

For this cocktail, I needed a format larger than the classic *purito*, so I was prepared with a Belicoso, from New World Oscuro, made by AJ Fernández. It is a blend of several tobaccos from different regions of Nicaragua, its 5 ½ x 55 format has never let me down, and the intensity is between medium and strong throughout the entire smoking time.

Once I had the cocktail in my hand, I inspected the cigar, before lighting it. The natural cocoa powder and coffee notes will blend very well with those of dark leather and noble cedar that will appear once lit.

As expected from this blend of tobaccos, the starting intensity is high and the draw is great. This is ideal with the initial sips from the cocktail, with the rum and coffee intermingled with the soda bubbles, satisfying and cleansing the palate at the same time, begging for you to continue puffing and sipping.

While all the flavors and the intensity of the cigar were in synchrony at the start of the pairing, as I approached the 2nd third of the cigar and the mid-point of the cocktail, the latter was coming across more sweetly, increasing the intensity of the pairing experience. While the cocktail provided the bulk of the sweetness, those notes were also coming in minute quantities from the tobacco, a clear indication that this was the perfect cigar for the occasion.

Simple, well-made things are often the most pleasant surprises. I hope that Körner Coffee Bar will continue to have the tables and chairs outside, for those sunny days, so people can enjoy a good tobacco with one of their fine coffees.

Philip Ili Barake
#GRCigarPairing



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