Twitter Thread by Jiten Parmar



Jiten Parmar
@jitenkparmar

A thread I had done in sugar industry last year. A few things could have changed. But, I think there are huge challenges to the E20 story. Do we have underlying dynamics in place. Do read how much time it took for Brazil.

Disc: Invested in sugar only as tactical play.

> Sugar Industry Insights (Feb 25, 2020)
> Last few years sugar industry has been a beneficiary of government largesse. Sugar cycle turned in 2015. Post that there has been surplus production.
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> — Jiten Parmar (@jitenkparmar) February 25, 2020