



*Central America:
A Quest for the Progression of
Economic Value.
Bonus-Season V.*

The origin of Central America political-economy.

Period of study: From 1700 to 1900

Episode 10

**Sugar-Sugar America Part 10
The Cuban Sugar Tycoons**

Central America: A Quest for the Progression of Economic Value. Season V

From 1700-1900: The origin of Central America political-economy.



Outline Calendar

Season V From January 9th to April 17th, 2026.

<p>9-jan-2026</p> <p>Episode 1 </p> <p>Sugar-Sugar America Part I Brazil </p>	<p>16-jan-2026</p> <p>Episode 2 </p> <p>Sugar-Sugar America Part II Dutch islands </p>	<p>23-jan-2026</p> <p>Episode 3 </p> <p>Sugar-Sugar America Part III British West Indies - Production </p>	<p>30-jan-2026</p> <p>Episode 4 </p> <p>Sugar-Sugar America Part IV British West Indies - Barbados </p>	<p>06-Feb-2026</p> <p>Episode 5 </p> <p>Sugar-Sugar America Part V British West Indies - Barbados and Jamaica </p>
<p>13-feb-2026</p> <p>Episode 6 </p> <p>Sugar-Sugar America Part VI French Context (St Domingue) </p>	<p>20-feb-2026</p> <p>Episode 7 </p> <p>Sugar-Sugar America Part VII French Business Model Sugar St Domingue Analysis </p>	<p>27-feb-2026</p> <p>Episode 8 </p> <p>Sugar-Sugar America Part VIII La Señorita Cuba Context </p>	<p>06-March-2026</p> <p>Episode 9 </p> <p>Sugar-Sugar America Part IX Cuban Sugar Machine </p>	<p>13-March-2026</p> <p>Episode 10 </p> <p>Sugar-Sugar America Part Cuban Sugar Tycoons </p>
<p>20-March-2026</p> <p>Episode 11</p> <p>Cattle, Livestock and other Foodstuff Central America </p>	<p>27-mar-2026</p> <p>Episode 12</p> <p>Banana Republics Central America </p>	<p>03-Apr-2026</p> <p>Episode 13</p> <p>Summary and Conclusions Seasons I and II </p>	<p>10-Apr-2026</p> <p>Episode 14</p> <p>Summary and Conclusions Seasons III, IV and V </p>	<p>17-April-2026</p> <p>Episode 15</p> <p>Research Agenda for the future </p>

Holy Week



Central America: A Quest for the Progression of Economic Value. Season V

A piece of the economic puzzle of Spanish Central America in Four Seasons + Bonus



Big Picture of our Content.

Season V as of January 9th, 2026.

Season	Start Date	Finish Date	Number of episodes	Historical Timeline to Analyze	Main General themes
One (I) Autumn -Winter 2024	October 4 th , 2024	December 27 th , 2024	13 episodes	1492-1558	<ul style="list-style-type: none"> Historical foundations Castile & Aragon: Discovery of Spanish America, the Holy Roman Empire Charles V Holy Roman Emperor: his local, personal, regional, religious, and international agenda The Spanish Inquisition
Two (II) Winter-Spring 2025	January 24 th , 2025	May 2 nd , 2025	13 episodes	1492-1700	<ul style="list-style-type: none"> Spanish America with a Medieval Allure: Conquest and Colonization Understanding the economic philosophy of the Habsburgs Rulers in Central America: Philip II, Philip III, Philip IV, and Charles II. Commodities: Mining extraction of precious metal reserves
Three (III) Spring-Summer 2025	May 23 rd , 2025	August 29 th , 2025	14 episodes	1700-1900	<ul style="list-style-type: none"> School of Salamanca The Bourbon era begins. From Philip V (1683-1746) to Alfonso XIII (1886-1941) The War of Spanish Succession The Jesuit Suppression and Restoration (1773-1814) The meaning of the French Revolution in Spanish America The Why of Napoleon Bonaparte
Four (IV) Autumn-Winter 2025	September 19 th , 2025	December 31 st , 2025	15 episodes	1700-1900	<ul style="list-style-type: none"> Independence Bells of Central America (1800-23) United Provinces of Central America (1823-40) Derailement of violence and inner conflicts Charted Urban vs Forgotten Rural Mining + Agricultural Commodities. Never an Industrial Factory Development. Main agriculture production industries: Cacao, Indigo, coffee, Sugar-Introduction
Five (V) BONUS Winter Spring 2026	January 9 th , 2026	April 10 th , 2026	15 episodes	1700-1900	<ul style="list-style-type: none"> Analysis of Main Agriculture plantations. Sugar-Sugar America, Bananas, Cattle and Livestock, Foodstuff Summary and Conclusions Research Agenda for the future.

Past saga: done

Past saga: done

Past saga: Done

Past saga: Done

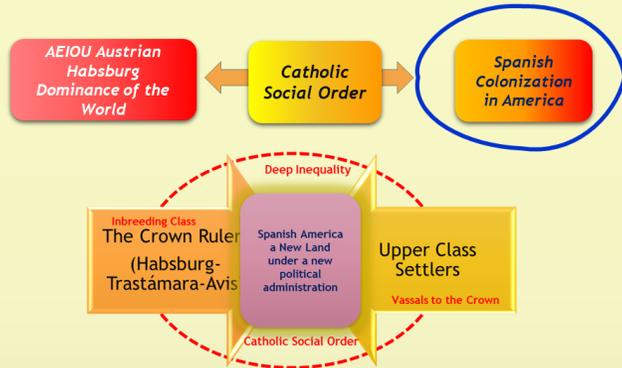
We are here

Central America: A Quest for the Progression of Economic Value. Season V. From 1700-1900: The origin of Central America political-economy.



Sugar-Sugar. America Part X. The Cuban Sugar Tycoons

Our agenda for today's master class:



“Most of good historians are chroniclers of events. A Chronicler narrates, but doesn't explain the facts. Before proceeding further in our civilization, corporate strategists are obliged to understand the different explanations and interpretations of history. Otherwise, history will repeat under new circumstances”.

Eleonora Escalante Strategy. El Salvador

Class of 27 february

Last week

Today

1. Geographic Description
2. Origin of the Plantations
3. Main Political events
4. Demographics
5. Sugar Industry
 - a) General Overview
 - b) The shift after 1898
 - c) Land Structure
 - d) Production
 - e) Worldwide positioning
 - f) Who were the planters
 - g) Monoculture economy
 - h) Factories (here we will include the description of the new free-labor system, and manufacturing costs.



La siempre fiel Juana Cuba, 19th century. From her discovery she was baptized as a Castile-Aragón territory, later disrupted fiercely by the Bourbons of France and Spain. While the USA and German Britain somehow got involved too.

https://www.emersonkent.com/history/timelines/american_timeline.htm

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Sugar Industry of Cuba: The Factories explained

Sugar-Sugar. America Part X. The Cuban Sugar Tycoons

The sugar industry of Cuba

Today's masterclass session is about the factories (centrales) of Cuba.

We will analyze the Cuban factories of 1904, 1917 and 1945.

The factories of sugar in Cuba couldn't have produced those high levels of tons per year, without the higher plantation yields (in the hands of low-wage workers) and without the expansion of sugar plantations. The Cuban sugar cane planted area in hectares grew as follows:

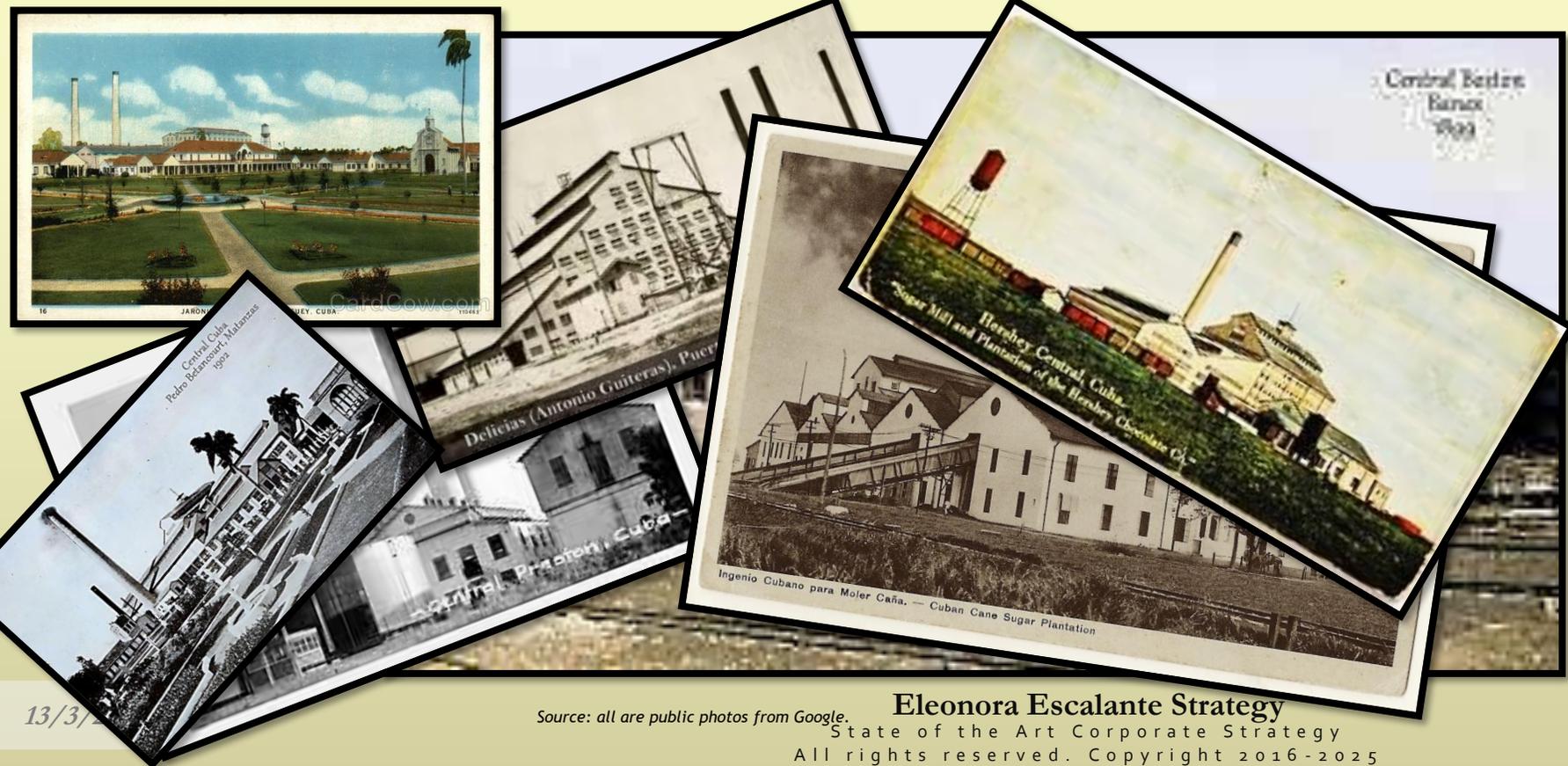
- 1899: 162,532 hectares
- 1904: 174,460 hectares
- 1908: 335,506 hectares
- 1945: 1,103,197 hectares

Why is it important to comprehend the sugar industry of Cuba between 1898 and 1959? Cuba then, a super-capitalist agromonoculture industry grew from:

335,506 sugar cane planted hectares in 1908/09, producing 1.5 million tons of sugar



1,103,197 sugar cane planted hectares in 1945 producing around 4 million tons of sugar, and then 6.67 million tons in 1948



All the information of these slides is supported and inferred from the bibliography page 24-25)

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The sugar industry of Cuba

The cane plantation yields of the year 1904/05

Analysis of the Cuban sugar cane harvested going to the sugar mills, year 1904/05

The episode of today is data analysis. We have gathered information about the cane plantation yields and the main indicators of the mill manufacturing. We will compare three years: 1904, 1917 and 1945.

1 caballeria = 342 cordeles = 13.42 hectares = 33.16 acres Cuban System year 1900

CUBA weight Conversions		
1 arroba	25.36	libras
1 arroba	11.502	kg
1 arroba	16.13	litres
1 Spanish short ton	80.0	arrobas
1 British long ton	2240	libras
1 American or British short ton	2000	libras
1 British long ton	1.12	American short ton
1 spanish long ton	2271.6	libras
1 cuban ton	20	quintales
1 quintal	100	libras
1 quintal español	4	arrobas
1 kg	2.24	libras
1 spanish bag of raw sugar	325	libras
1 spanish bag of raw sugar	0.1451	ton
1 cwt (quintal español)	4.00	arrobas spanish

Planted area of sugar cane				
Cultivation yield 1904/05 average type		arrobas	tons	bags of 325 libras
Yield of Arrobas cane/caballería		50,000.0	506.6	3,902
Yield of weight cane/ha		3,725.8	46.6	291
Yield of weight cane/acres		1,507.7	18.8	118
Categories of crop yields/caballeria				
Good crop yield		80,000		
Above good crop yield		100,000		
Super-high crop yield		160,000		
Low crop yield		20,000		

According to Geerligs, one caballeria of planted sugar cane was classified in relation to its yields. If the harvest was super excellent the caballeria could yield between 100,000 to 160,000 arrobas. On average, the cultivation yield at that time was 50,000 arrobas or 506.6 tons of cane/caballeria (Geerligs uses British long tons in this set of data). This is the cane cut and clean weighted at the mill before manufacturing.

Land yields of Cane per caballeria				Safra 1904/05		
Province	Total cultivated area cabs	Total of sugar cane planted cabs	Planted by the Sugar mill cabs	Planted by Colonos		Number of colonies Units
				On ground of the Estate (cabs)	On their own Colonies ground (cabs)	
Pinar del Río	576	507	141	155	211	253
Havana	1,600	790	149	251	390	147
Matanzas	4,617	3,455	916	1176	1363	533
Santa Clara	9,275	5,125	1206	1297	2620	1923
Camaguey	2,924	660	366	287	7	
Oriente	4,149	2,459	955	960	504	785
TOTAL	23,141	12,996	3,733	4,126	5,095	3,641
		56%	29%	32%	39%	

Going into a deeper level of analysis, Geerligs estimated the quantity of caballerias planted per province during the safra 1904/05. Here we can observe the caballerias were planted: By the colonos (on land of the Sugar mill estates, or their own lands (as proprietors or renters); and by the sugar mill-owners. In the year 1904, Santa Clara was by far the province with more caballerias planted, followed by Matanzas and Oriente. The Sugar mill owners planted 29% of the sugar cane plantations, while the colonos planted the rest (71%).

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Sugar-Sugar. America Part X. The Cuban Sugar Tycoons

The sugar industry of Cuba

Analysis of the costs per caballeria of sugar plantations. Year 1904/05

Analysis of the Cuban harvests going to the sugar mills, year 1904/05

Cost Analysis 1904-05 planters					New cane	5
Costs per caballeria						
Activity	Min	Max	Average	Analysis Costs 5 years investments		
Planting new cane	\$ 1,000	\$ 1,400	\$ 1,200	\$ 1,400		
Planting 1-2 ratoon wave	\$ 340			\$ 1,360		
Cutting and cleaning			\$ 400	\$ 2,000		
Loading in oxcarts			\$ 200	\$ 1,000		
Transportation			\$ 200	\$ 1,000		
Subtotal			\$ 2,000	\$ 6,760		

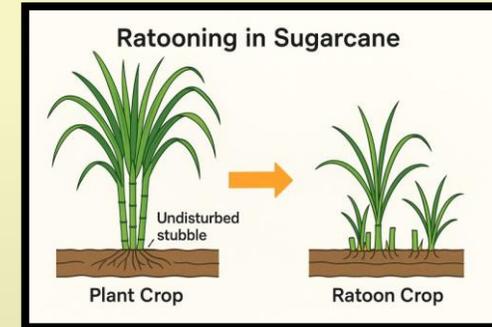
An effort to calculate the cost of a sugar plantation:

The activities required to produce sugar cane during the safra were 5: planting new cane, planting 1-2 waves of ratoon, cutting and cleaning, loading in oxcarts, transportation to the mill.

Each of these productive activities was identified by Geerligs, and he priced it in USD (year 1904). In 5 years, planting new cane occurs only once, while planting in ratoon occurs 4 times (4x \$340). The rest of activities are multiplied x 5 years, and the total cost per caballeria (5 safras) ascends to 6,760 USD. The cost per arroba of sugar cane yielded by one caballeria, depended on the type of harvest.

Each activity of the planters (colonos or Owners of mills) has a cost.

In Cuba, at the entrance of the 20th century, the plantations success hung on the natural rainfall. No irrigation cost was required. No other care was given on the planting. When the cane was ready, it was cut with machete, stripped of its tops and re-cut into pieces of 60 cm to 1 meter each, it was bundled and piled up on ox carts, driven to the nearest factory or weighing stations, and/or laden into railway trucks for transportations to the mills.



Ratoon Cropping

Cost of planting till is brought to the sugar mill (arrobas/caballería) per 5 years				
Average production	50,000	250,000	\$ 0.027	Cost per arroba of sugar cane/caballeria (from planting to the conveyance to the mill)
Above Good Production	100,000	500,000	\$ 0.014	
Min Production	20,000	100,000	\$ 0.068	
	Arrobas/year	Arrobas/5 years		
Buying cane from the colonos who ground on their own or on the estate of the mill.				
Cost for the Mill	5% of the weight in cane paid in sugar**		** Note: Sugar price of the Havana quotation on the day of the delivery (if required in cash by colonos)	
	the 5% can change: It may be reduced when colonos have had much money advanced, or may increase when there is lack of cane			
	Price of the cane: clean cane in bundles delivered on the weight scale			

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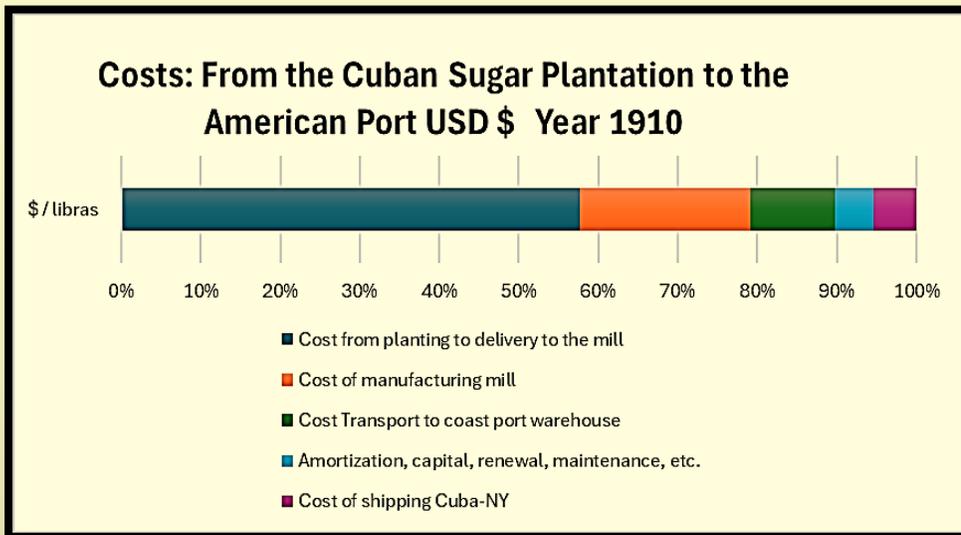
Sugar-Sugar. America Part X. The Cuban Sugar Tycoons

The sugar industry of Cuba

Once in the sugar mill, the cane was transformed in sugar using new technologies.

Analysis of the Costs of Production of raw sugar year 1910

In the year 1910, the company Willett and Gray quoted the cost price of raw sugar from Cuba at average FOB Cuba 1.85 cents per libra. And the average CIF New York at 1.95 cents/libra. The 3 main merchant firms which published sugar statistics (exports-imports-prices-costs-quotes, etc.) were Willett & Gray (New York and Boston), H. Clark, and J.W. de Silva & Co.



Estimated Cost sugar cane to from the farm to NY port (Cif)			
	Unit	\$ / libras	\$ cents/lb
Cost from planting to delivery to the mill		\$ 0.01065	\$ 1.06
Cost of manufacturing mill		\$ 0.00394	\$ 0.39
Cost Transport to coast port warehouse		\$ 0.00197	\$ 0.20
Amortization, capital, renewal, maintenance, etc.		\$ 0.00089	\$ 0.09
Total cost fob port CUBA		\$ 0.01745	\$ 1.74
Cost of shipping Cuba-NY		\$ 0.0010	\$ 0.10
Total Cost cif NY		\$ 0.01845	\$ 1.84

Let's Remember:

F.O.B: Free on board (sugar safely on board of the vessel leaving the port of production). The seller completes the delivery obligation after loading the goods on board the ship at the port of shipment.

F.A,S: Free Alongside Ship, the seller places the goods next to the ship designated by the buyer at the port of shipment to complete the delivery obligation.

C.I.F: Cost including Insurance and Freight.

The cost structure of one libra of sugar (by year 1910) is shown in numbers and a stacked graph. The cost price of sugar (the essence of it) is not in the manufacturing mill. It depends on the cost of the cane (raw material) and on the percentage of sugar that the cane yields.

- The most expensive item in the cost structure of one pound of sugar was the costs associated with the planting-harvest-cutting-transportation to the mill. It represented around 58%.
- The manufacturing cost at the centrales (using the new industrial factories and equipment), represented around 21%.
- At this time, little quality control was invested on the mills.
- The quantity of sugar obtained from 100 parts of cane was measured in a yield ratio. This number depended on the conditions of the sugar content and the purity of the juice. The range was between 9.54 (year 1902) to 11.62 (year 1910)

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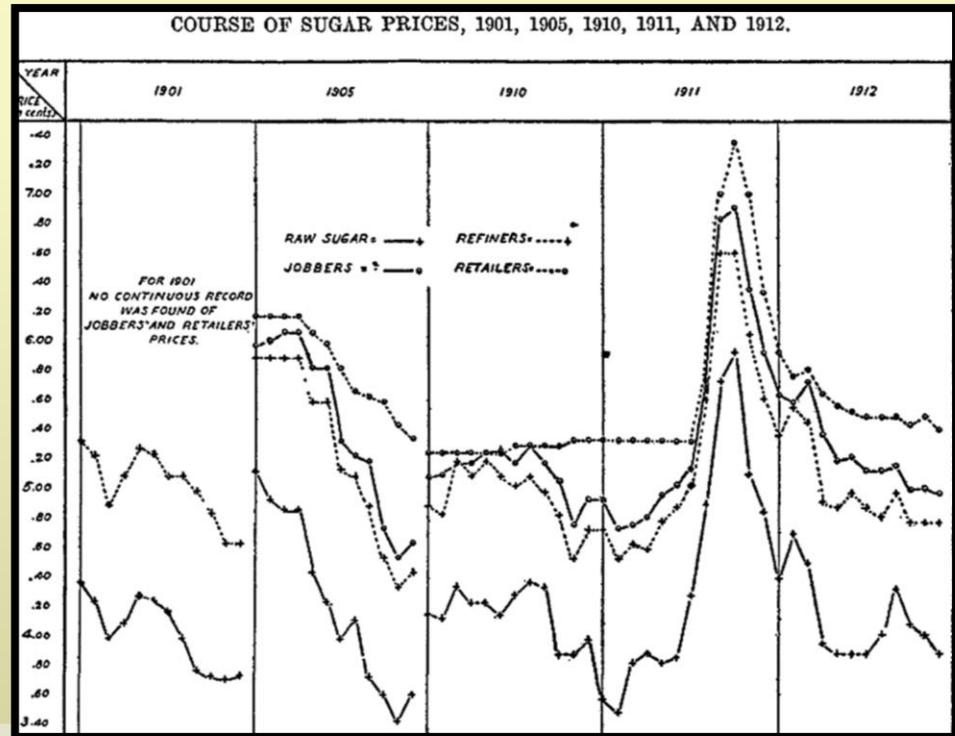
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The sugar industry of Cuba

How was the sugar sold after arriving to the port of NY?

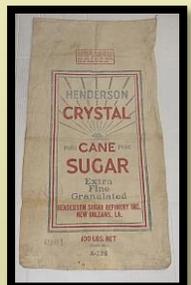
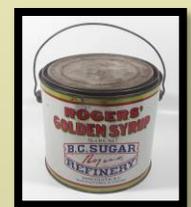
Analysis of the profits per lb/sugar 1910



- The graph at your left shows 4 different sugar prices: The raw sugar, the jobbers, the retailers and the refiners.
- It shows the fluctuations of these 4 prices categories between 1901 to 1912.
- The profits of the merchants were calculated as price (-) cost. The margin is the difference between the selling price and the cost price of each of the dealers (intermediaries) handling sugar.
- The graph shows the positive correlation between the price of raw sugar and the price paid by the consumer for granulated sugar.
- Additionally, you can observe the price differentials and the aggregation of it as it passed from different hands and processes after received in the port of NY.
- FYI: A jobber was one commercial player who buys merchandise from a manufacturer to then sell it to retailers (wholesalers).

Once the sugar arrived in New York ports, the cargo of sugar is landed at a refinery dock, or it is transferred to a lighter or to a storage dock. Each bag of 325 of Cuban sugar (raw sugar) is moved by a crane from the ship to a truck. Duty on sugar is paid on the customs' weight. At the refinery, the sugar is washed and boiled until it passes to centrifugal machines, re-boiled, molded and finally packed in different categories. The refiners sold sugar through sugar brokers to jobbers, retailers or large grocery establishments.

- The refineries sold different grades of sugar: fine granulated, crystal domino granulated, extra fine granulated, standard granulated, cubes, powdered, confectioners A, etc.
- The refiners sold it barrels of 350 lbs, bags of 100, 50, 25, 10, 5, 2 lbs, etc.
- Each container or package had a different pricing. In 1912, the prices of these products per pound varied between 4.90 cents to 5.60. The most expensive was the Crystal Dominoes sold at 7.90 cents/pound.



Saco de caña de azucar Crystal and Vintage Rogers Syrup Golden Sugar Vancouver, B.C. Sugar Refinery 10lb Tin Metal Ca and Crystal Domino Sugar of 5 lbs.

<https://treasurevalleyantiques.com/products/vintage-rogers-syrup-golden-sugar-vancouver-b-c-sugar-refinery-10lb-tin-metal-can-with-lid> and <https://www.ebay.com/itm/298044144325?> And <https://www.ebay.com/itm/176310920891>

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The sugar industry of Cuba

Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

Outputs of the Centrales year 1914 and 1917

The Pinar del Río Province held 10 centrales, and the top 3, produced 62% of the total sugar production output of that province in 1914. By 1917 it grew to 74%.

Pinar del Rio			All mills producing >100,000 bags					
			Ouput in raw sugar					
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
1	Merceditas	Cuban American Sugar Co	87,200	28,340,000	14,170	151,121	49,114,325	24,557
2	El Pilar	F. de Goicochea	73,457	23,873,525	11,937	128,445	41,744,625	20,872
3	San Ramón	A. Balsinde	57,200	18,590,000	9,295	90,000	29,250,000	14,625
Subtotal top 3 ingenios			217,857	70,803,525	35,402	369,566	120,108,950	60,054
4 to 10	The rest	Subtotal the rest	134,145	43,597,125	21,799	126,515	41,117,375	20,559
Percentage top 3 ingenios			62%			74%		
Totals			352,002	114,400,650	57,200	496,081	161,226,325	80,613



Central Merceditas, Pinar del Rio.

The Cuban American Sugar Co. was founded by Robert Bradley Hawley (1849-1921). In 1899 Hawley incorporated the Cuban-American Sugar Co. in New Jersey and acquired the Central Tingüaro, and the Hacienda Chaparra of Matanzas. In total, the Cuban American Sugar Co, held 6 centrales: Central Unidad, Delicias, Chaparra, Tingüaro, Mercedita and Constanca.

Read more:
<https://www.jaimemontilla.com/cuban-american-sugar-co>

We have classified the top centrales azucareras of Cuba per province from the years 1914 and 1917. Please observe the comparative growth of production. We have converted the bags of 325 lbs to the total quantity of lbs and short tons (American).

Look at the name of the owners of each mill.

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Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

Outputs of the Centrales year 1914 and 1917

Havana: Havana province had 21 centrales at this time. The top 11 centrales are listed on this analysis. Andrés Gomez Mena, R. Pelayo and Cia Central Toledo were the top producers of sugar.
11 mills grinded 79% of the sugar cane of the sugar mills of Havana.

Havana			All mills producing >100,000 bags					
			Ouput in raw sugar					
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
1	Gomez Mena	Andrés Gómez Mena	270,600	87,945,000	43,973	339,527	110,346,275	55,173
2	Amistad	Andrés Gómez mena	155,067	50,396,775	25,198	273,410	88,858,250	44,429
3	Rosario	R. Pelayo	219,527	71,346,275	35,673	252,987	82,220,775	41,110
4	Toledo	Cia Central Toledo	176,807	57,462,275	28,731	244,620	79,501,500	39,751
5	La Julia	Cuba Cane Corp	180,440	58,643,000	29,322	219,943	71,481,475	35,741
6	Providencia	Cia Azucarera Guines	168,735	54,838,875	27,419	196,644	63,909,300	31,955
7	Mercedita	Enrique Pascual	177,411	57,658,575	28,829	165,000	53,625,000	26,813
8	San Antonio	Cia Gomez Mena	141,678	46,045,350	23,023	160,700	52,227,500	26,114
9	Nueva Paz	SA Central Nueva Paz	98,873	32,133,725	16,067	101,618	33,025,850	16,513
10	Fortuna	Palmer Ferrera	16,977	5,517,525	2,759	92,516	30,067,700	15,034
11	San Agustin	Central San Agustin Sugar Co	73,758	23,971,350	11,986	91,465	29,726,125	14,863
Subtotal top 11			1,679,873	545,958,725	272,979	2,138,430	694,989,750	347,495
11 to 21	The rest	Subtotal the rest of mills	437,153	142,074,725	71,037	583,486	189,632,950	94,816
Percentage top 11 ingenios			79%			79%		
Totals			2,117,026	688,033,450	344,017	2,721,916	884,622,700	442,311



Central Gomez Mena. Image shared in Facebook group: Cafetales e Ingenios de Cuba.

Andrés Gómez Mena (1849-1917) and his descendants, owned more than 9 sugar mills. The Gomez Mena group was ranked among the top 10 all over the country.

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The sugar industry of Cuba

Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

Outputs of the Centrales year 1914 and 1917

Matanzas held 40 operational centrales. The top 15 centrales were producing more than 100,000 bags per year (1917). In this province, the Cuba Cane Sugar Corporation was an important stakeholder.

Matanzas		Top mills are		All mills producing >100,000 bags		Ouput in raw sugar		
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
1	Alava	Cuba Cane Sugar Corp	208,910	67,895,750	33,948	294,857	95,828,525	47,914
2	Conchita	Cuba Cane Sugar Corp	202,217	65,720,525	32,860	289,183	93,984,475	46,992
3	Tinguaro	Cuban American Sugar Co	194,459	63,199,175	31,600	263,550	85,653,750	42,827
4	Socorro	Cuba Cane Sugar Corp	310,091	100,779,575	50,390	257,821	83,791,825	41,896
5	España	Jose. L. Rodriguez	144,862	47,080,150	23,540	207,550	67,453,750	33,727
6	Union	José Lezama y Larrea	152,355	49,515,375	24,758	198,675	64,569,375	32,285
7	Santa Gertrudis	Cuba Cane Sugar Corp	174,558	56,731,350	28,366	196,122	63,739,650	31,870
8	Cuba	Central Cuba sugar Corp	171,987	55,895,775	27,948	178,839	58,122,675	29,061
9	Limonos	JY Lizama	28,828	9,369,100	4,685	148,686	48,322,950	24,161
10	Feliz	Cuba Cane Sugar Corp	135,587	44,065,775	22,033	142,706	46,379,450	23,190
11	Guipuzcoa	Sobrinos de Aroceña	56,974	18,516,550	9,258	135,463	44,025,475	22,013
12	Progreso	Laurentino García	128,614	41,799,550	20,900	129,850	42,201,250	21,101
13	Soledad	Cuba Cane Sugar Corp	115,914	37,672,050	18,836	129,406	42,056,950	21,028
14	Santa Amalia	Laurentino García	49,602	16,120,650	8,060	121,700	39,552,500	19,776
15	Australia	Alberto Alvarez Sen C	-	-	-	104,313	33,901,725	16,951
Subtotal top 15			2,074,958	674,361,350	337,181	2,798,721	909,584,325	454,792
16 to 40	The rest	Subtotal the rest of mills	1,559,336	506,784,200	253,392	1,588,421	516,236,825	258,118
Percentage top 15 ingenios			57%			64%		
Totals			3,634,294	1,181,145,550	590,573	4,387,142	1,425,821,150	712,911

Ingenio Conchita, Matanzas; Cuba.



The Cuba Cane Sugar Corp. was incorporated in New Jersey on December 31, 1915 with a capital of \$50 million by Manuel Rionda y Polledo, and family members who owned 27% of the initial shares outstanding. Other primary initial investors were J & W Seligman & Co. who owned 7%, J. P. Morgan & Co. 15%, and National City Bank 4%. Other names associated to Rionda were Alfred Jaretzky of Sullivan & Cromwell, E. W. Stetson, Irénée Dupont de Nemours, and Matthew Chauncey Brush. Upon its organization, the Cuba Cane Sugar Corp. became the single most important sugar company in Cuba. Read more: <https://www.jaimemontilla.com/cuba-cane-sugar>

Source: Active Sugar Plantations of Cuba
Map published by The Munson Steamship Line of New York
Year 1918

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The sugar industry of Cuba

Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

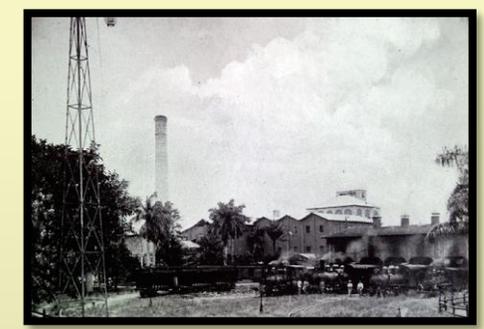
Outputs of the Centrales year 1914 and 1917

Santa Clara 1/2

The province of Santa Clara was the densest in terms of Centrales. More than 71 centrales were operational by 1917. 34 of them were milling more than 100,000 bags per safra.

Santa Clara			Top mills are All mills producing >100,000 bags					
			Ouput in raw sugar					
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
1	Hormiguero	Central Hormiguero Co.	199,019	64,681,175	32,341	213,423	69,362,475	34,681
2	Caracas	Caracas Sugar & RR Co	139,258	45,258,850	22,629	204,328	66,406,600	33,203
3	Andreita	Central Andreita Cia Azucarera	178,423	57,987,475	28,994	191,427	62,213,775	31,107
4	Tuinucu	The Tuinucu Sugar Co.	173,663	56,440,475	28,220	183,582	59,664,150	29,832
5	Perseverancia	Cuba Cane Sugar Corp	162,974	52,966,550	26,483	181,552	59,004,400	29,502
6	Santa Teresa	Santa Teresa Sugar Co.	108,816	35,365,200	17,683	169,597	55,119,025	27,560
7	Washington	Washington Sugar Co.	152,821	49,666,825	24,833	169,165	54,978,625	27,489
8	Constancia	Cuban American Sugar Co.	160,403	52,130,975	26,065	166,682	54,171,650	27,086
9	Lequeitio	Cuba Cane Sugar Corp	152,200	49,465,000	24,733	174,000	56,550,000	28,275
10	Covadonga	SA Central Covadonga	124,086	40,327,950	20,164	162,248	52,730,600	26,365
11	Fe	Central Sugar Corp	94,520	30,719,000	15,360	161,025	52,333,125	26,167
12	San Agustín	Nicolas Castaño	122,385	39,775,125	19,888	152,000	49,400,000	24,700
13	Constancia	Constancia Sugar CO	102,883	33,436,975	16,718	146,960	47,762,000	23,881
14	San Lino	Balvin y Valle	65,982	21,444,150	10,722	139,200	45,240,000	22,620
15	Reforma	Cia Azu. Central Reforma	126,153	40,999,725	20,500	137,834	44,796,050	22,398

Central El Hormiguero



Tomás Terry Adan (1808-86) invested in the sugar industry with Central Juragua in Cienfuegos. Then in Central Caracas, acquired by Terry in 1862, which was kept in the family ownership until 1920 when it was sold to the Caracas Sugar & Railroad Co. who in the mid 1920s sold it to Edwin F. Atkins. Luisa Maximina Terry Irady (1844-1934) inherited Central El Hormiguero from her aunt.

Read More: <https://www.jaimemontilla.com/tomas-terry>

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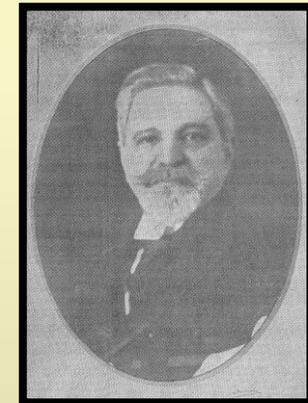
The sugar industry of Cuba

The Santa Clara Province was the top producer of sugar of Cuba. 30% of the sugar was grinded in this province.

Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

Santa Clara			Santa Clara 2/2					
Top mills are All mills producing >100,000 bags			Ouput in raw sugar					
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
16	Santa María	E Caciado	75,843	24,648,975	12,324	103,774	33,726,550	16,863
17	Santa Rosa	R G Abreu	103,261	33,559,825	16,780	137,973	44,841,225	22,421
18	Vitoria	Juan Pablo Ruíz de Gámix	177,844	57,799,300	28,900	133,960	43,537,000	21,769
19	San José	Goicochea Hermanos	75,375	24,496,875	12,248	130,625	42,453,125	21,227
20	San Agustin	Cia Anonima Central San Agus	85,248	27,705,600	13,853	130,590	42,441,750	21,221
21	Patricio	Patricio Sugar Co.	132,204	42,966,300	21,483	128,453	41,747,225	20,874
22	Fidencia	Domingo Leon	86,704	28,178,800	14,089	125,822	40,892,150	20,446
23	María Victoria	Cuba Cane Sugar Corp.	42,096	13,681,200	6,841	120,758	39,246,350	19,623
24	Narcisa	North American sugar Corp	126,414	41,084,550	20,542	118,907	38,644,775	19,322
25	Violeta	Violeta Sugar Co.	-	-	-	120,486	39,157,950	19,579
26	Santa Catalina	E Abreu	83,651	27,186,575	13,593	117,820	38,291,500	19,146
27	Santa Lutgarda (Lopez)	J. M. López	81,803	26,585,975	13,293	122,565	39,833,625	19,917
28	Soledad	E. Atkins	129,006	41,926,950	20,963	116,309	37,800,425	18,900
29	Zaza	Viuda de Zulueta	106,479	34,605,675	17,303	113,851	37,001,575	18,501
30	Resulta	Heirs Juan de Dios Ona	73,572	23,910,900	11,955	106,487	34,608,275	17,304
31	Portugalete	Estate de Escarza	100,617	32,700,525	16,350	109,000	35,425,000	17,713
32	Dos hermanas Fowler	Dos Hermanas Sugar Co	72,295	23,495,875	11,748	109,726	35,660,950	17,830
33	Manuelita	Central Manuelita SA	102,050	33,166,250	16,583	108,416	35,235,200	17,618
34	La Vega	La Vega Sugar Co.	-	-	-	101,374	32,946,550	16,473
Subtotal top 34			3,718,048	1,208,365,600	604,183	4,809,919	1,563,223,675	781,612
34 of 71	The rest	Subtotal the rest of mills	1,457,511	473,691,075	236,846	1,934,314	628,652,050	314,326
Percentage top 34 ingenios			72%			71%		
Totals			5,175,559	1,682,056,675	841,028	6,744,233	2,191,875,725	1,095,938

Manuel Rionda Polledo (1854-1943)
The Sugar Baron of Cuba



Read more:

- <https://www.jaimemontilla.com/manuel-rionda>
- https://www.academia.edu/5227214/Manuel_Rionda_a_Polledo_1854_1943_

Source: Active Sugar Plantations of Cuba
Map published by The Munson Steamship Line of New York
Year 1918

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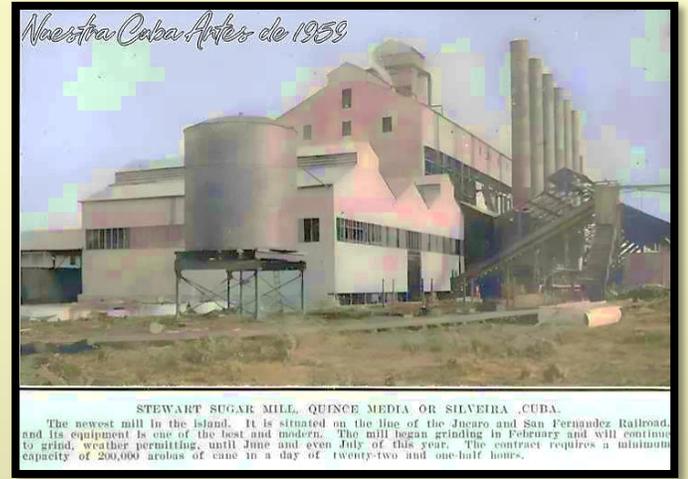
Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

Outputs of the Centrales year 1914 and 1917

The Cuban Cane Sugar Corporation held three of the top 7 sugar mills of Camaguey. All of them producing more than 100,000 bags of 325 lbs of sugar.

Central Mill Stewart, Camaguey

Camaguey			Top mills are			All mills producing >100,000 bags		
			Ouput in raw sugar					
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
1	Stewart	Cuba Cane Sugar Corp	502,567	163,334,275	81,667	375,983	122,194,475	61,097
2	Jagueyal	Cuba Cane Sugar Corp	286,057	92,968,525	46,484	251,013	81,579,225	40,790
3	Francisco	Francisco Sugar Co.	293,334	95,333,550	47,667	196,070	63,722,750	31,861
4	Moron	Cuba Cane Sugar Corp	-	-	-	181,322	58,929,650	29,465
5	Jatibonico	Cuba Co	319,050	103,691,250	51,846	155,676	50,594,700	25,297
6	Ciego de Avila	Ciego de Avila Cia Azucarera	24,934	8,103,550	4,052	140,915	45,797,375	22,899
7	Baragua	Baragua Sugar Co	-	-	-	106,229	34,524,425	17,262
Sub total top 7			1,425,942	463,431,150	231,716	1,407,208	457,342,600	228,671
8 to 21	Sub total rest of the mills		637,074	207,049,050	103,525	647,260	210,359,500	105,180
Percentage top 7 ingenios			69%			68%		
Totals			2,063,016	670,480,200	335,240	2,054,468	667,702,100	333,851



Source: Active Sugar Plantations of Cuba
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Let's see the output of sugar per each province of Cuba- Years 1914 and 1917

The Oriente Province held the mega-centrales with the greater milling capacity of the Cuba republic. The investments of the United Fruit Company were the Boston and the Preston. Manuel Rionda was producing at higher levels with the Delicias and Manati.

Outputs of the Centrales year 1914 and 1917

Oriente-Santiago De Cuba			Top mills are All mills producing >100,000 bags					
			Ouput in raw sugar					
Number	Name of Main Mill-Plantation	Owners	1914			1917		
			Bags 325 lb	Lbas	short Tons	Bags 325 lb	lbs	short Tons
1	Chaparra	Cuban American Sugar Co.	616,179	200,258,175	100,129	602,939	195,955,175	97,978
2	Boston	United Fruit Company	460,033	149,510,725	74,755	400,953	130,309,725	65,155
3	Delicias	Cuban American Sugar Co.	492,662	160,115,150	80,058	544,924	177,100,300	88,550
4	Manati	Manati Sugar Co.	134,696	43,776,200	21,888	385,695	125,350,875	62,675
5	Preston	Nipe Bay Co.	493,325	160,330,625	80,165	350,165	113,803,625	56,902
6	Santa Lucía	Santa Lucia Co	337,923	109,824,975	54,912	338,421	109,986,825	54,993
7	Isabel	Beattie & Co	283,660	92,189,500	46,095	81,151	26,374,075	13,187
8	Soledad	Guantanamo Sugar Co	128,000	41,600,000	20,800	114,000	37,050,000	18,525
Sub total top 8			2,946,478	957,605,350	478,803	2,818,248	915,930,600	457,965
9 to 21	Sub total rest of the mills		1,569,461	510,074,825	255,037	1,944,018	631,805,850	315,903
Percentage top 11 ingenios			65%			59%		
Totals			4,515,939	1,467,680,175	733,840	4,762,266	1,547,736,450	773,868

Chaparra, Delicias and Boston Sugar Mills, at Oriente Province.



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Map published by The Munson Steamship Line of New York
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The Chaparra Sugar Central was considered as the largest in the world.

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The sugar industry of Cuba

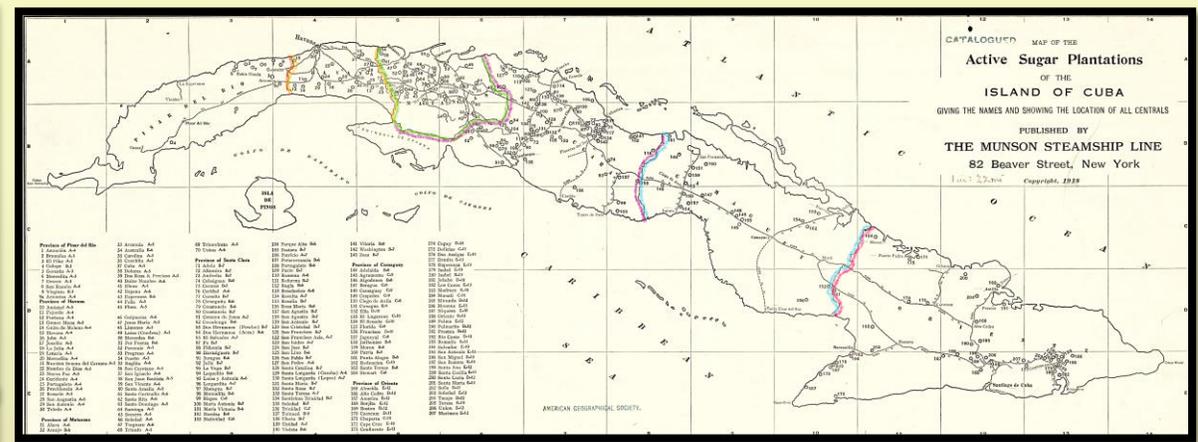
The period between 1914 to 1917 is the period in which the Cuban Industry became well established, surpassing Java, in Indonesia.

Let's see the big picture. Consolidation of the slides 10-16

Outputs of the Centrales year 1914 and 1917

Consolidation of the Central Mills 1914						
Province	Number of mills	Bags	lbs	American short tons	British Long tons	Percentage bags
Pinar del Rio	7	352,002	114,400,650	57,200	51,072	2.0%
Havana	19	2,117,026	688,033,450	344,017	307,158	11.9%
Matanzas	40	3,634,294	1,181,145,550	590,573	527,297	20.4%
Santa Clara	70	5,175,559	1,682,056,675	841,028	750,918	29.0%
Camaguey	8	2,063,016	670,480,200	335,240	299,322	11.6%
Oriente	33	4,515,939	1,467,680,175	733,840	655,214	25.3%
Total	177	17,857,836	5,803,796,700	2,901,898	2,590,981	100.0%

Consolidation of the Central Mills 1917						
Province	Number of mills	Bags	lbs	American short tons	British Long tons	Percentage
Pinar del Rio	9	496,081	161,226,325	80,613	71,976	2.3%
Havana	21	2,721,916	884,622,700	442,311	394,921	12.9%
Matanzas	40	4,387,142	1,425,821,150	712,911	636,527	20.7%
Santa Clara	73	6,744,233	2,191,875,725	1,095,938	978,516	31.9%
Camaguey	21	2,054,468	667,702,100	333,851	298,081	9.7%
Oriente	42	4,762,266	1,547,736,450	773,868	690,954	22.5%
Total	206	21,166,106	6,878,984,450	3,439,492	3,070,975	100.0%



- Why is it important to understand the outputs of the Sugar Centrales of Sugar?**
1. The whole country was a sugar machine for exports to the USA refineries, mainly located in the North-East (NY, New Jersey, Philadelphia, etc).
 2. The province of Oriente was born with sugar centrales of multinational corporations in which the corporate governance was led by Cuban planters of long-trajectory, mingled with American businesses and banks.
 3. Santa Clara was the province with the greater quantity of mills: 73 mills grinding more than 1 million short tons in 1917.
 4. Cuba was planting in the old-traditional way, while milling with the top of the mechanization of the epoch.

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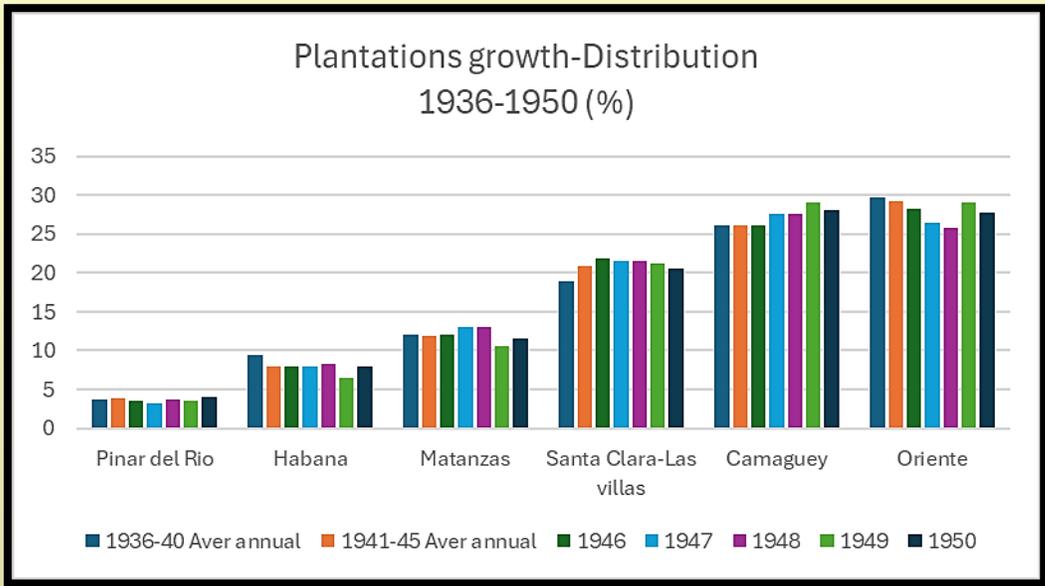
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The sugar industry of Cuba

The Sugar plantations in 1945.

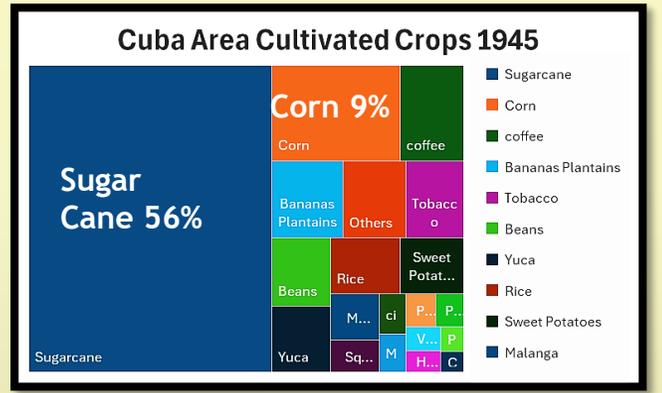
Analysis Sugar plantations and sugar Mills of Cuba 1945

By 1945, the total area in farms was 22,430,000 acres. Of which, 21.7% was cultivated (all the crops), 42.9% was in pasture, 13.9% was in woodland, and the rest (21.5%) included forests, areas infested with marabú, and land devoted to buildings, roads, and sugar connectivity.



Source: IBRD report 1945, and Investments in Cuba 1956

- Approximately 7.6 million acres (28% of Cuba Total land area) was totally controlled by Sugar Interests.
- Year over Year, each of the provinces experienced certain level of steady growth, but never as explosive as in the 1920s.
- Camaguey and Oriente represented more than 55% of the sugar plantations.
- In 1933, the sugar industry was regulated: because the larger estates were restricted by law.
- The distribution of Cuban sugar production by provinces between 1936 to 1950 show us which provinces continued to grow in plantation (Camaguey and Santa Clara), while Pinar del Río, Havana and Matanzas didn't expand substantially.



In 1945, we can observe that sugar cane plantations represented half of the cultivated land (56%). Followed in descending order were corn, coffee, bananas, tobacco, beans, yuca, rice and sweet potatoes.

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The sugar industry of Cuba

The progression of Cuban Land cultivated for sugar and its respective yields.

Analysis Sugar plantations harvests and yields.

The average cane acreage (planted-grown) during the period between 1936 and 1940 was 2.3 million acres, which then increased to 3 million acres by 1950.

Cuban Land and Plantation of Cane/production of Sugar per year								
Year	Area In cane grown		Area Harvested		Cane Harvested (American Short Tons)		Sugar milled	
	Hectares (000s)	Acres (000s)	Hectares (000s)	Acres (000s)	Yield Per acre (short tons)	Thousand tons Total Short tons	Sugar Yield of cane %	Total Sugar Produced short thousands tons
1936-40	938.08	2,318	711.45	1,758	17.15	30,150	12.40	3,739
1941	928.37	2,294	747.47	1,847	17.87	33,006	12.50	4,126
1942	879.00	2,172	847.03	2,093	17.45	36,523	12.29	4,489
1943	972.08	2,402	646.30	1,597	15.85	25,312	13.03	3,298
1944	1,010.12	2,496	968.03	2,392	18.90	45,209	12.41	5,610
1945	1,023.07	2,528	948.20	2,343	12.90	30,225	12.98	3,923
1946	1,070.42	2,645	1,018.62	2,517	14.65	36,874	12.15	4,480
1947	1,151.36	2,845	1,122.62	2,774	18.96	52,595	12.26	6,448
1948	1,224.20	3,025	1,179.68	2,915	18.61	54,248	12.30	6,673
1949	1,206.80	2,982	1,189.40	2,939	15.65	45,995	12.53	5,763
1950 estimated	1,197.90	2,960					12.81	-

Source: IBRD report 1945, and Investments in Cuba 1956

- From 1936 to 1949, the total Cuban sugar plantation grown area matured from 2,318,000 acres to 2,960,000 acres (28%). In terms of harvests, it also increased from 1,758,000 acres to 2,939,000 (an augmentation of 67%).
- Now, if we observe the cane harvested that was sent to the mills for crushing, we also see the enlargement from 30,150 thousand short tons to 45,995 thousand (52% rise).
- Finally, the raw sugar produced at the mills, also expanded from 3,739 thousand to 5,763 thousand for an increment of 54%.
- This table explains how more cane planted creates an increment of cane harvested, and in consequence a boost of the total raw sugar produced.

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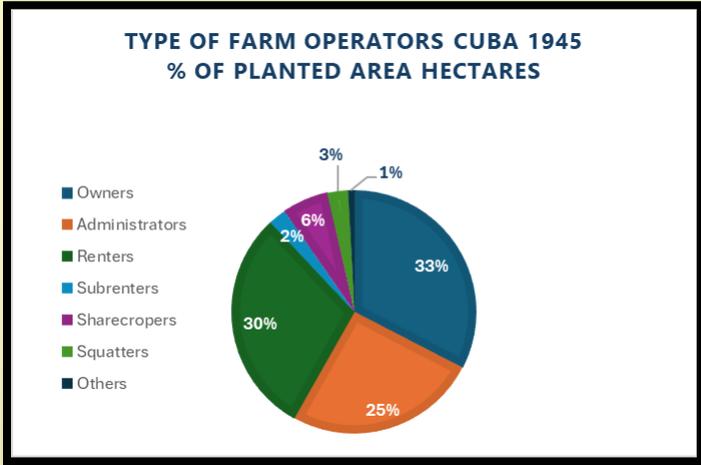
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The sugar industry of Cuba

Let's analyze the farm operators in Cuba 1945.

Analysis of the ownership of the farms 1945.

Types of Farm Operators in Cuba 1945				
Type of Operator	Farms		Total Area	
	Number	% of total	Hectares	%of total
Owners	48,792	31%	2,958,695	33%
Administrators	7,342	5%	2,320,445	26%
Renters	46,048	29%	2,713,930	30%
Subrenters	6,987	4%	215,216	2%
Sharecroppers	33,064	21%	552,079	6%
Squatters	13,718	9%	244,589	3%
Others	2,007	1%	72,134	1%
Totals	157,958	100%	9,077,086	100%



The farms dedicated to planting and harvesting sugar cane were 26.6% of all the farms in 1945

During the 1950s, the World Bank advised Cuba to accompany the changes of the land ownership for an optimum-scale of units of production with education and technical competence of the farmers, the availability of credit facilities with low interest rates, and the cooperation between all the stakeholders of the value chain. Fidel Castro arrival to power terminated the Cuban sugar industry, without any hope for a potential cooperation for its restructuring. It was a foul seizing-decision making.

The farm operators of Cuba (year 1945) were mainly the owners of large estates, administrators appointed by the owners, and renters (colonos). Around 89% of the land was in these 3 type of operators.

Ownership of the farms demonstrates the land tenure shifted completely to the largely owner-estates: a few companies, a few individuals, many of them foreigners, or administrators appointed by foreign American firms. Every province held different type of owner-operated farms: some of them dedicated to pastures more than sugar cane.

The farms operated by squatters contained more woodland.

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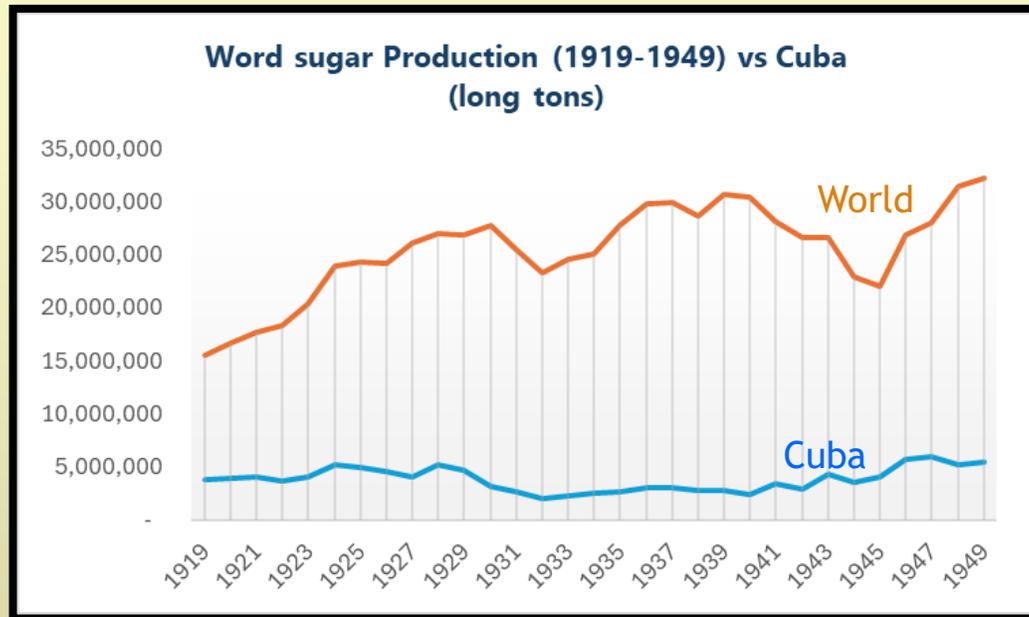
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Let's see the output sugar production of Cuba in comparison to the World production of sugar 1919-49

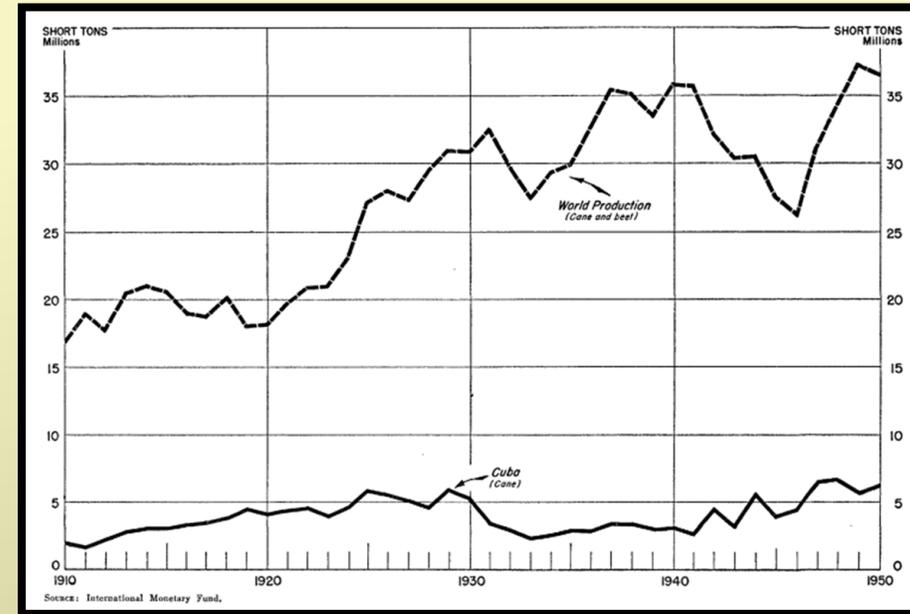
Comparison world vs. Cuba

The fluctuations of the Cuban sugar production are explained by the geopolitical conditions, but the competition for sugar became fierce with the expansion of plantations in colonial Africa. During the two World Wars, Cuba experienced a sharp increase of market share.



Source: From data of the IBRD report 1945.

Fluctuations of sugar production.



Source: From data of the IBRD report 1945.

All the information of these slides is supported and inferred from the bibliography page 24-25

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Sugar Industry of Cuba: The Factories explained

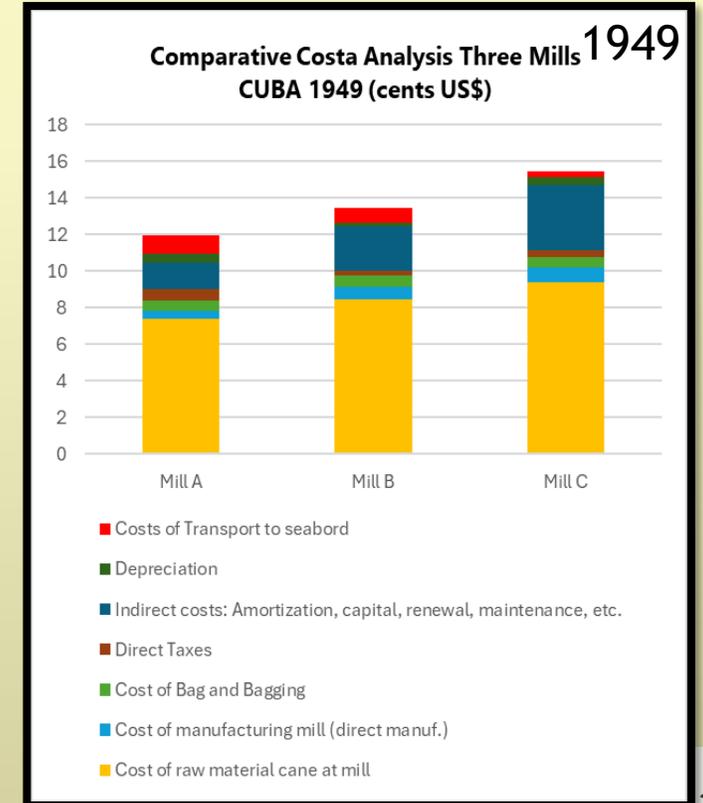
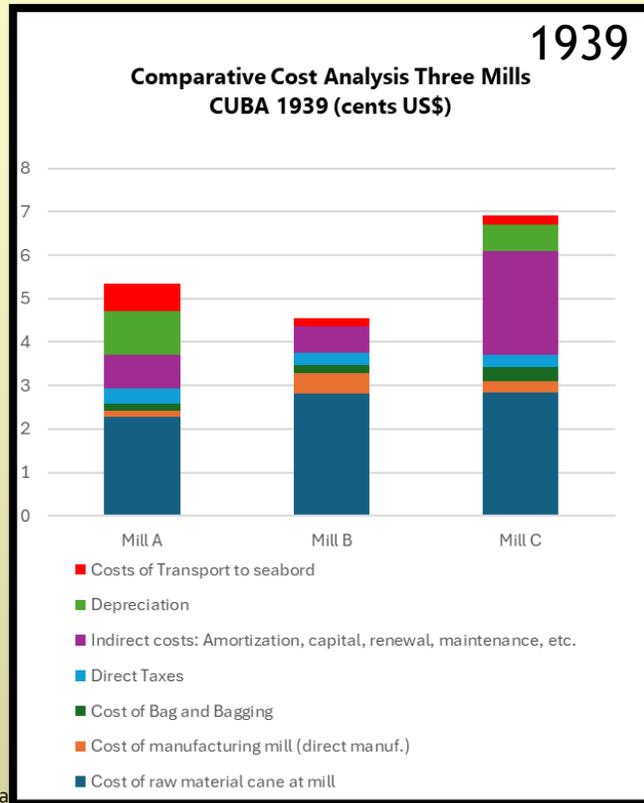
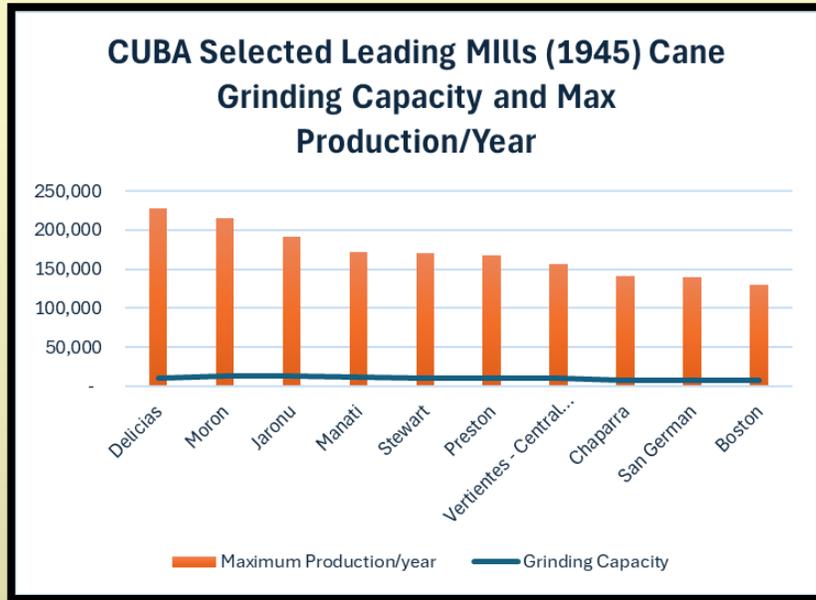
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The sugar industry of Cuba

Capacity of the mills of Cuba and cost analysis of three mills

The cost analysis of 3 different sugar mills in Cuba (two scenarios, 1939 and 1949) shows that each mill was handling its operational structure in different ways, depending on the management and negotiation power. The grinding capacity of the leading mills is also shown here.

Analysis Sugar Mills of Cuba 1945



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The sugar industry of Cuba

Nationality of Ownership Sugar Mills of Cuba (selected years).

Analysis Sugar Mills of Cuba 1945

Number of Sugar Mills in Cuba-Share of Production, by Nationality of Ownership - Selected Years										
Year	Cuban		USA		Spanish		Other		Total Mills	
	Number	Production %	Number	Production %	Number	Production %	Number	Production %	Number	Production %
1915	67	na	43	na	42	na	18	na	170	100%
1926	101	na	41	63%	16	na	26	na	184	100%
1935	50	na	70	62%	37	na	22	na	179	100%
1939	56	22%	68	55%	33	15%	19	8%	176	100%
1950	108	49%	44	47%	6	2%	3	1%	161	100%
1952	113	55%	41	43%	6	2%	1	<1%	161	100%
1953	114	55%	41	42%	5	2%	1	<1%	161	100%
1954	118	60%	39	39%	3	1%	1	<1%	161	100%
1955	118	59%	39	40%	3	1%	1	<1%	161	100%

Source: Investments in Cuba 1956

Cuban interests controlled 3/4 of all the centrals in Cuba by 1955. However, this wasn't the case in 1939. In terms of production, the Cubans milled 59% of the sugar production in that same year.

- The American sugar mills oscillated between 39 to 70 between 1915 up to 1955. Over 2/3 of the production of sugar was produced and controlled by USA American centrales between 1920 to 1940.
- What happened after 1940 that North American Mills sold at least 20 mills during the time of the WWII. The answer: Hawaii and Puerto Rico had better yields per planted acre, by far Hawaii almost multiplied 4X the Cuban yield (63.7 short tones cane/acre Hawaii vs 17.2 short tons/acre Cuba). It is possible that American planters sold their stakes in Cuba and moved to other plantations' countries where the yield was higher. Additionally, it is possible that they perceived the Castro phenomena well in advance.
- Government intervention affected the Cuban sugar industry since 1925.
- Another reason is related to the US quota system (1937 Act).

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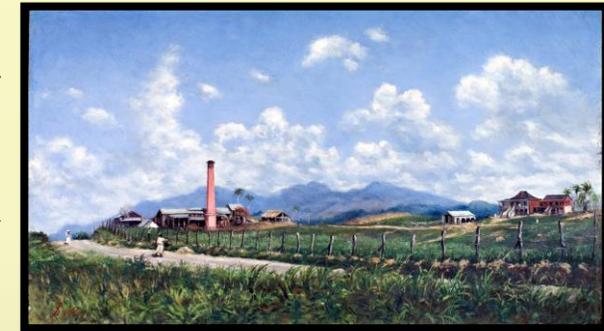


Sugar-Sugar. America Part X. The Cuban Sugar Tycoons

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Sugar-Sugar. America Part IX. The Cuban Sugar Machine

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Casco Hacienda La Asunción, Cihuatán, El Salvador.



Sugar sugar in Central America 18th-19th centuries
Photo: Galería Guatecaña.

Thank you

**The origin of Central America political-economy.
Period of study: From 1700 to 1900**

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