



WASDE – February 8, 2019

SUGAR: U.S. beet sugar production for 2018/19 is unchanged at 4.900 million short tons, raw value (STRV) as an increase in projected sucrose recovery from sliced sugarbeets is offset by less sugarbeet production estimated by NASS. Cane sugar production for 2018/19 in Louisiana is increased to 1.875 million STRV based on a reporting of cane processor manufacturing results completed in January. Cane sugar production for Florida is increased to 2.091 million STRV based on higher sugarcane production forecast by NASS and a processor recovery forecast of 12.48 percent. Beginning stocks for 2018/19 are increased 59,700 STRV based on cane processors' and refiners' revisions in the Sweetener Market Data. Tariff-rate quota imports are reduced by 4,002 STRV. Lower-than-expected entries of FTA sugar under calendar-year 2018 TRQs more than offset additional 2017/18 WTO TRQ sugar entered under USDA waivers in October 2018. In sum, projected ending stocks are increased by 131,698 STRV to 1.795 million for a stocks-to-use ratio of 14.59 percent. There are no changes to the Mexico 2018/19 supply and use balance.

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U.S. Sugar Supply and Use 1/

	2016/17	2017/18 Est.	2018/19 Proj.	2018/19 Proj.
			Dec	Feb
	<i>1,000 Short Tons,</i>		<i>Raw Value</i>	
Beginning Stocks	2054	1876	1948	2008
Production 2/	8969	9293	8941	9017
Beet Sugar	5103	5279	4900	4900
Cane Sugar	3866	4014	4041	4117
Florida	2055	1983	2050	2091
Hawaii	43	0	0	0
Louisiana	1628	1862	1841	1875
Texas	140	169	150	150
Imports	3244	3277	3080	3076
TRQ 3/	1611	1663	1564	1560
Other Program 4/	419	326	350	350
Other 5/	1213	1287	1165	1165
Mexico	1201	1223	1120	1120
Total Supply	14267	14445	13969	14100
Exports	95	170	35	35
Deliveries	12258	12185	12270	12270
Food 6/	12102	12048	12125	12125
Other 7/	156	137	145	145
Miscellaneous	38	82	0	0
Total Use	12391	12438	12305	12305
Ending Stocks	1876	2008	1664	1795
Stocks to Use Ratio	15.1	16.1	13.5	14.6

1/ Fiscal years beginning Oct 1. Data and projections correspond to category components from "Sweetener Market Data" (SMD). 2/ Production projections for 2017/18 and 2018/19 are based on Crop Production and processor projections where appropriate. 3/ For 2017/18, WTO raw sugar TRQ shortfall (268) and for 2018/19 (99). 4/ Composed of sugar under the re-export and polyhydric alcohol programs. 5/ Imports from Mexico; and high-tier tariff sugar and syrups not otherwise specified -- for 2017/18 (64) and 2018/19 (45). 6/ After 2014/15, SMD deliveries for domestic human food use and for miscellaneous uses reported separately. 7/ Transfers accompanying deliveries for sugar-containing products to be exported (SCP) and polyhydric alcohol manufacture (POLY), and deliveries for livestock feed and ethanol. Total refiner license transfers for SCP and POLY inclusive of WASDE-reported deliveries: 2016/17 -- 389; estimated 2017/18 -- 278; projected 2018/19 -- 324.



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Mexico Sugar Supply and Use and High Fructose Corn Syrup Imports 1/

		Beginning Stocks	Production	Imports	Domestic 2/	Exports	Ending Stocks
<b>Sugar</b>				<i>1,000 Metric Tons,</i>	<i>Actual Weight</i>		
2017/18	Dec						
Est.		1002	6010	204	4723	1099	1395
	Feb	1002	6010	204	4723	1099	1395
2018/19	Dec						
Proj.		1395	6025	70	4893	1266	1330
	Feb	1395	6025	70	4893	1266	1330

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): Oct-Sep 2016/17 = 1,522; Estimated 2017/18 = 1,593; Oct-Dec 2017 = 395; Projected 2018/19 = 1,593; Oct-Dec 2018 = 355. Footnote source for estimate: Comité Nacional para el Desarrollo Sustentable de la Cana de Azúcar. 2/Includes deliveries for consumption, Mexico's products export program (IMMEX), and Other Deliveries/Ending Year Statistical Adjustments. IMMEX: 2017/18 (482 est); 2018/19 (480). Other Deliveries/Ending Year Statistical Adjustments: 2017/18 (29), 2018/19 (13).