



WASDE – May 10, 2019

SUGAR: U.S. sugarbeet production for 2019/20 is projected at 33.556 million tons with yield forecast at 30.5 tons/acre. Slower-than-average planting progress in the Upper Midwest and Michigan has dampened prospects for significant gains in the national yield over last year and for harvesting prospects prior to October 1. Assuming average levels of beet pile shrink and slicing recovery, beet sugar production from this crop is projected at 4.943 million short tons, raw value (STRV). Beet sugar produced prior to October 1 is projected at 502,000 STRV, or about 123,000 STRV lower than the average of the 5 previous years. Beet sugar production for 2018/19 is estimated to fall to 4.910 million STRV, as the drop in August-September production is only marginally offset by a small increase in estimated slicing recovery. Beet sugar production for the new 2019/20 fiscal year is projected at 5.114 million STRV. The increase over the crop year total is due to a higher level of assumed 2020 August-September production. Cane sugar production for 2019/20 is projected at 4.001 million STRV. Small increases over 2018/19 are projected for both Florida and Texas. Louisiana production is projected to fall from the 2018/19 record to 1.800 million STRV as a lower sugarcane yield closer to trend more than offsets expected area expansion and less sugarcane used for seed.

Imports for 2019/20 are projected at 3.219 million STRV. Projected 2019/20 TRQ imports of specialty sugar include only the WTO minimum quantity as additional quantities have not been announced by the Secretary of Agriculture. The WTO raw sugar TRQ shortfall for 2019/20 is projected at 99,000 STRV and the shortfall for 2018/19 is increased 22,046 STRV based on FAS Post reporting. High-tier tariff imports for 2018/19 are increased to 70,000 STRV based on the pace to date. Deliveries to domestic users for 2019/20 are projected at 12.320 million STRV, an increase of 50,000 in deliveries for human consumption over 2018/19. Ending stocks for 2019/20 are residually projected at 1.484 million STRV, implying a stocks-to-use ratio of 12.01 percent. Ending stocks for 2018/19 are estimated at 1.505 million STRV, a reduction of 119,930 matching estimated supply reductions. The estimated 2018/19 stocks-to-use ratio is 12.23 percent.

Mexico sugar production for 2018/19 is increased to 6.200 million metric tons (MT) as increases to sugarcane yield and sucrose recovery more than offset an area harvested decrease. Total deliveries for human consumption are reduced by 378,883 MT to 4.236 million. Ending stocks available for the domestic market are projected to be the quantity of sugar needed at the end of September to meet projected delivery requirements until the start of the 2019/20 harvest in mid-November. Exports to the United States are unchanged but exports to third-country destinations and commitments under the CEDES export certificate program now total 1.186 million MT. Production for 2019/20 is set at 6.100 million MT; deliveries for human consumption are projected at the same level of per capita sweetener consumption as in 2018/19; and ending stocks are calculated in the same manner as in 2018/19. Total exports are residually projected but exports to the United States are projected at the expected level of U.S. Needs as defined in the amended Suspension Agreements.



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U.S. Sugar Supply and Use 1/

	2017/18	2018/19 Est.	2018/19 Est.	2019/20 Proj.
		Apr	May	May
		<i>1,000 Short Tons,</i>	<i>Raw Value</i>	
Beginning Stocks	1876	2008	2008	1505
Production 2/	9293	9060	8947	9115
Beet Sugar	5279	4997	4910	5114
Cane Sugar	4014	4063	4037	4001
Florida	1983	2043	2014	2051
Hawaii	0	0	0	0
Louisiana	1862	1875	1875	1800
Texas	169	145	148	150
Imports	3277	2862	2855	3219
TRQ 3/	1663	1560	1538	1381
Other Program 4/	326	350	350	350
Other 5/	1287	952	967	1488
Mexico	1223	897	897	1418
Total Supply	14445	13930	13810	13839
Exports	170	35	35	35
Deliveries	12185	12270	12270	12320
Food	12048	12125	12125	12175
Other 6/	137	145	145	145
Miscellaneous	82	0	0	0
Total Use	12438	12305	12305	12355
Ending Stocks	2008	1625	1505	1484
Stocks to Use Ratio	16.1	13.2	12.2	12

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 2018/19, WTO raw sugar TRQ shortfall (121) and for 2019/20 (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 2018/19 (70) and 2019/20 (70). 6/ 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: 2017/18 -- 278; estimated 2018/19 -- 324; projected 2019/20 -- 340.



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

		Beginning Stocks	Production	Imports	Domestic 2/	Exports	Ending Stocks
				<i>1,000 Metric Tons,</i>	<i>Actual Weight</i>		
Sugar							
2018/19	Apr						
Est.		1395	6152	70	5095	1102	1420
	May	1395	6200	70	4716	1954	995
2019/20	Apr						
Proj.		NA	NA	NA	NA	NA	NA
	May	995	6100	70	4776	1394	995

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2017/18 = 1,593; Estimated Oct-Mar 2018 = 755; Projected 2018/19 = 1,520; Estimated Oct-Mar 2019 = 713; Projected 2019/20 = 1,520. Footnote source for estimate: Comité Nacional para el Desarrollo Sustentable de la Cana de Azucar. 2/Includes deliveries for consumption, Mexico's products export program (IMMEX), and Other Deliveries/Ending Year Statistical Adjustments. IMMEX: 2018/19 (480 est); 2019/20 (480 proj). Other Deliveries/Ending Year Statistical Adjustments: 2018/19 (0), 2019/20 (0).