



WASDE – August 12, 2019

SUGAR: Beet sugar production for the August-July 2019/20 crop year is projected at 5.106 million short tons, raw value (STRV) on sugarbeet area and yield forecasts made by NASS in Crop Production and recent year averages for sucrose extraction and pile shrink. Most of the increase over last month is projected to occur in the early August-September harvest year period, resulting in an increase of 88,653 STRV to 5.008 million for the 2018/19 fiscal year. Beet sugar production for 2019/20 is increased to 5.179 million STRV. Florida cane sugar production for 2019/20 is increased by 44,603 STRV based on a strong NASS forecast of sugarcane yields that pushes the projected sugarcane crop up 2.4 percent over the prior year.

Imports for 2019/20 are increased by 24,302 STRV primarily on the USDA decision to extend the period of entry of the 2018/19 raw sugar TRQ to October 15. Deliveries for human consumption for 2018/19 are increased by 75,000 STRV to 12.200 million based on strength in direct consumption imports. Through June, however, deliveries by domestic processors have remained relatively flat for the past two years. Human consumption deliveries for 2019/20 are increased in line but only by 50,000 STRV in a changing sugar and sweeteners' deliveries environment as evidenced by flat to declining total and per-capita caloric sweeteners and refined sugar for calendar years 2016-18. (See Tables 49 and 50 at the ERS Sugar and Sweeteners Yearbook.) Ending stocks for 2019/20 are projected at 1.699 million STRV for a stocks-to-use ratio of 13.74 percent. There are no significant changes from last month to sugar supply and use in Mexico for 2018/19 or for 2019/20.



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	2017/18	2018/19 Est.	2019/20 Proj.	2019/20 Proj.
			Jul	Aug
	<i>1,000 Short Tons, Raw Value</i>			
Beginning Stocks	1876	2008	1761	1775
Production 2/	9293	9036	9260	9308
Beet Sugar	5279	5008	5175	5179
Cane Sugar	4014	4028	4085	4129
Florida	1983	2005	2051	2096
Hawaii	0	0	0	0
Louisiana	1862	1875	1900	1900
Texas	169	147	134	134
Imports	3277	3091	2957	2981
TRQ 3/	1663	1604	1568	1593
Other Program 4/	326	400	350	350
Other 5/	1287	1087	1039	1039
Mexico	1223	997	969	969
Total Supply	14445	14135	13978	14064
Exports	170	35	35	35
Deliveries	12185	12325	12280	12330
Food	12048	12200	12175	12225
Other 6/	137	125	105	105
Miscellaneous	82	0	0	0
Total Use	12438	12360	12315	12365
Ending Stocks	2008	1775	1663	1699
Stocks to Use Ratio	16.1	14.4	13.5	13.7

1/ Fiscal years beginning Oct 1. Data and projections correspond to category components from "Sweetener Market Data" (SMD). 2/ Production projections for 2018/19 and 2019/20 are based on Crop Production and processor projections where appropriate. 3/ For 2018/19, WTO raw sugar TRQ shortfall (28) 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 (90) 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/ <i>1,000 Metric Tons,</i>	Exports	Ending Stocks
Sugar				<i>Actual Weight</i>			
2018/19	Jul						
Est.		1395	6425	70	4716	2179	995
	Aug	1395	6426	70	4716	2179	995
2019/20	Jul						
Proj.		995	6248	70	4776	1542	995
	Aug	995	6248	70	4776	1542	995

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2017/18 = 1,593; Estimated Oct-June 2018 = 1,182; Projected 2018/19 = 1,520; Estimated Oct-June 2019 = 1,143; Projected 2019/20 = 1,520. 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: 2018/19 (480 est); 2019/20 (480 proj). Other Deliveries/Ending Year Statistical Adjustments: 2018/19 (0), 2019/20 (0).