



WASDE – June 11, 2019

SUGAR: U.S. sugarbeet production for 2019/20 is projected at 33.916 million tons, up 1 percent from last month. Overall planting progress in the United States advanced beyond the pace indicated last month to move the yield forecast to 30.8 tons/acre, up from 30.5. Based on average levels of beet pile shrink and slicing recovery, beet sugar production from this crop is projected at 4.992 million short tons, raw value (STRV) with production occurring in August and September at 511,111. This results in fiscal 2018/19 beet sugar production at 4.920 million STRV, a gain of 9,509 STRV. This increase is largely offset by lower 2018/19 Florida cane sugar production reported by processors. High-tier tariff imports for 2018/19 are increased by 20,000 STRV to 90,000 based on the pace of entries to date. These supply changes result in ending stocks for 2018/19 residually increasing to 1.526 million STRV, implying a stocks-to-use ratio of 12.40 percent, up marginally over last month.

Beet sugar production for 2019/20 is projected at 5.154 million STRV based on the larger sugarbeet crop. This increase is partially offset by lower cane sugar production in Texas due to weather-related area reductions for the 2019/20 crop as reported by the processor. With no changes to imports or use, the combination of higher beginning stocks of 20,469 STRV and a net production increase of 23,457 STRV implies ending stocks of 1.528 million and a stocks-to-use ratio of 12.37 percent.

Mexico sugar production for 2018/19 is estimated at 6.400 million metric tons (MT) based on CONADESUCA-estimated area of 796,770 hectares (ha) and USDA estimates of yield at 71.08 MT/ha and sucrose recovery of 11.30 percent. Mexico sugar production for 2019/20 is projected at 6.183 million MT assuming the same area as in 2018/19 and 5-year averages of sugarcane yield and sucrose recovery. With no other changes, the changes to production result in exports to non-U.S. destinations of 1.386 million MT in 2018/19 and 263,100 MT in 2019/20, based on CONADESUCA targets for ending stocks.



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U.S. Sugar Supply and Use 1/

	2017/18	2018/19 Est.	2019/20 Proj.	2019/20 Proj.
			May	Jun
	<i>1,000 Short Tons,</i>		<i>Raw Value</i>	
Beginning Stocks	1876	2008	1505	1526
Production 2/	9293	8948	9115	9138
Beet Sugar	5279	4920	5114	5154
Cane Sugar	4014	4028	4001	3985
Florida	1983	2005	2051	2051
Hawaii	0	0	0	0
Louisiana	1862	1875	1800	1800
Texas	169	148	150	134
Imports	3277	2875	3219	3219
TRQ 3/	1663	1538	1381	1381
Other Program 4/	326	350	350	350
Other 5/	1287	987	1488	1488
Mexico	1223	897	1418	1418
Total Supply	14445	13831	13839	13883
Exports	170	35	35	35
Deliveries	12185	12270	12320	12320
Food	12048	12125	12175	12175
Other 6/	137	145	145	145
Miscellaneous	82	0	0	0
Total Use	12438	12305	12355	12355
Ending Stocks	2008	1526	1484	1528
Stocks to Use Ratio	16.1	12.4	12	12.4

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 (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 (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.

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, Actual Weight</i>			
Sugar	2018/19						
	Est.						
	May	1395	6200	70	4716	1954	995
	Jun	1395	6400	70	4716	2153	995



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2019/20 Proj.	May	995	6100	70	4776	1394	995
	Jun	995	6183	70	4776	1476	995

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2017/18 = 1,593; Estimated Oct-Apr 2018 = 903; Projected 2018/19 = 1,520; Estimated Oct-Apr 2019 = 860; 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).