



WASDE – September 12, 2019

SUGAR: Beet sugar production for 2019/20 is projected at 5.005 million short tons, raw value (STRV), down 174,315 on reductions in NASS sugarbeet yield forecasts in Crop Production. The national sugarbeet yield is down 3.5 percent from August with reductions in all major producing regions. Beet sugar production for 2018/19 is decreased by 51,144 STRV to 4.957 million on processors' preliminary final crop year reporting that lowered estimated crop year sucrose recovery from sliced beets and lowered production from desugared molasses.

Raw sugar TRQ imports for the 2018/19 quota year eligible for entry until October 15 are forecast lower by 27,558 STRV, implying an increased shortfall estimate of 55,116 STRV. The reduction is expected to lower TRQ imports entering before September 30 by 22,046 STRV and imports in October by 5,512 STRV. Re-export imports for 2018/19 are estimated 20,000 STRV higher based on pace to date, largely offsetting the TRQ reduction. For 2019/20, imports from Mexico are projected at 1.118 million STRV, an increase of 149,375.

Deliveries for human consumption for 2018/19 are decreased by 25,000 STRV to 12.175 million based on a slower-than-expected pace. Corresponding deliveries for 2019/20 are decreased in line by the same amount. Ending stocks for 2018/19 are estimated at 1.747 million STRV for a stocks-to-use ratio of 14.16 percent. Ending stocks for 2019/20 are projected at 1.666 million STRV for a stocks-to-use ratio of 13.50 percent.

Mexico sugar production for 2019/20 is projected at 6.200 million metric tons, actual weight (MT), a reduction of 48,000 based on reports of drought in several producing areas. With no changes to imports, deliveries, or ending stocks, the change in exports for 2019/20 match the 48,000 MT decrease in production. Exports to the United States are projected at 956,738 MT, equal to the expected level of U.S. Needs as defined in the amended Suspension Agreements. Exports to non-U.S. destinations are projected residually at 537,091 MT.



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	2017/18	2018/19 Est.	2019/20 Proj.	2019/20 Proj.
			Aug	Sep
	<i>1,000 Short Tons,</i>		<i>Raw Value</i>	
Beginning Stocks	1876	2008	1775	1747
Production 2/	9293	8985	9308	9134
Beet Sugar	5279	4957	5179	5005
Cane Sugar	4014	4028	4129	4129
Florida	1983	2005	2096	2096
Hawaii	0	0	0	0
Louisiana	1862	1875	1900	1900
Texas	169	147	134	134
Imports	3277	3089	2981	3125
TRQ 3/	1663	1582	1593	1587
Other Program 4/	326	420	350	350
Other 5/	1287	1087	1039	1188
Mexico	1223	997	969	1118
Total Supply	14445	14082	14064	14006
Exports	170	35	35	35
Deliveries	12185	12300	12330	12305
Food	12048	12175	12225	12200
Other 6/	137	125	105	105
Miscellaneous	82	0	0	0
Total Use	12438	12335	12365	12340
Ending Stocks	2008	1747	1699	1666
Stocks to Use Ratio	16.1	14.2	13.7	13.5

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 (55) 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,</i>		<i>Actual Weight</i>			
Sugar							
2018/19	Aug						
Est.		1395	6426	70	4716	2179	995
	Sep	1395	6426	70	4716	2179	995
2019/20	Aug						
Proj.		995	6248	70	4776	1542	995
	Sep	995	6200	70	4776	1494	995



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1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2017/18 = 1,593; Estimated Oct-July 2018 = 1,320; Projected 2018/19 = 1,520; Estimated Oct-July 2019 = 1,279; 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).