



## WASDE – September 11, 2020

SUGAR: U.S. sugar production for 2020/21 is increased by 27,095 short tons, raw value (STRV) to 9.292 million. Cane sugar production in Texas is increased by 60,984 STRV to 141,984 based on processor reporting. Projected cane sugar production in Louisiana and Florida are unchanged from last month. Beet sugar production is decreased 33,889 STRV to 5.165 million on a decrease in the NASS-forecast national sugarbeet yield.

The Secretary of Agriculture increased the 2019/20 raw sugar TRQ by 100,000 STRV in early September and extended the period that the TRQ raw sugar can enter through October 31. Of this amount, it is estimated that 11,814 STRV will enter in September of 2019/20 and 66,139 STRV will enter in October of 2020/21. The 2019/20 raw sugar TRQ shortfall is increased by 22,046 STRV to 83,046. FTA sugar for 2019/20 is increased by 6,931 STRV but reduced by the same amount for 2020/21 because sugar allocated to Canada for the 2020 calendar year entered the United States earlier in 2019/20 than forecast last month. On the basis of pace, high-tier tariff imports for 2019/20 are increased by 30,000 STRV but imports from Mexico are reduced by 12,766 STRV. For 2020/21, imports from Mexico are projected at 888,150 STRV, a decrease of 190,625 from last month and high-tier tariff imports are unchanged at 50,000 STRV.

Deliveries for human consumption for 2019/20 are increased by 100,000 STRV to 12,150 million as the pattern of deliveries to end users has stabilized. Deliveries for 2020/21 correspondingly are increased by 25,000 STRV to 12,150 million. Ending stocks for 2019/20 are estimated at 1.745 million for an ending stocks-to-use ratio of 14.2 percent. Ending stocks for 2020/21 are projected at 1.659 STRV for an ending stocks-to-use ratio of 13.5 percent.

Mexico sugar supply and use for 2019/20 has small changes for imports of sugar for consumption, a small decrease for exports, and increased deliveries for the IMMEX program. These changes are made on the basis of the pace to date. The net result is to increase ending stocks by 4,926 metric tons (MT). High Fructose Corn Syrup (HFCS) deliveries for 2019/20 are reduced by 60,000 MT, dry weight, to 1.410 million on pace. For 2019/20, raw sugar exports to the United States are estimated at 758,113 MT and refinada exports are estimated at 424,765 MT. For 2020/21 total exports are increased to match the increase in beginning stocks. Exports to the United States are reduced to 760,110 MT on calculated U.S. Needs as set out in the AD/CVD Suspension Agreements. Exports to third-country destinations are residually increased to 742,053 MT. Projected deliveries of HFCS are unchanged at 1.470 million MT, dry weight.



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U.S. Sugar Supply and Use 1/

	2018/19	2019/20 Est.	2020/21 Proj.	2020/21 Proj.
			Aug	Sep
		<i>1,000 Short Tons,</i>	<i>Raw Value</i>	
Beginning Stocks	2008	1783	1744	1745
Production 2/	8999	7989	9265	9292
Beet Sugar	4939	4244	5199	5165
Cane Sugar	4060	3745	4066	4127
Florida	2005	2106	2135	2135
Hawaii	0	0	0	0
Louisiana	1907	1513	1850	1850
Texas	147	126	81	142
Imports	3070	4263	3044	2913
TRQ 3/	1541	2256	1565	1624
Other Program 4/	438	415	350	350
Other 5/	1092	1592	1129	938
Mexico	1000	1382	1079	888
Total Supply	14077	14035	14053	13949
Exports	35	35	35	35
Deliveries	12231	12255	12230	12255
Food	12106	12150	12125	12150
Other 6/	126	105	105	105
Miscellaneous	28	0	0	0
Total Use	12294	12290	12265	12290
Ending Stocks	1783	1745	1788	1659
Stocks to Use Ratio	14.5	14.2	14.6	13.5

1/ Fiscal years beginning Oct 1. Data and projections correspond to category components from "Sweetener Market Data" (SMD). 2/ Production projections for 2019/20 and 2020/21 are based on Crop Production and/or processor projections/industry data and/or sugar ICEC analysis where appropriate. 3/ For 2019/20, WTO raw sugar TRQ shortfall (83) and for 2020/21 (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 2019/20 (210) and 2020/21 (50). 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: 2018/19 -- 374; estimated 2019/20 -- 340; projected 2020/21 -- 353.



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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
<b>Sugar</b>				<i>1,000 Metric Tons,</i>	<i>Actual Weight</i>		
2019/20 Est.	Aug	1169	5278	91	4498	1233	807
	Sep	1169	5278	105	4518	1222	812
2020/21 Proj.	Aug	807	6000	89	4468	1497	931
	Sep	812	6000	89	4468	1502	931

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2018/19 = 1,528; Estimated 2019/20 = 1,410; Projected 2020/21 = 1,470; Estimated Oct-July 2019/20 = 1,158, Oct-July 2018/19 =1,279. 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: 2019/20 (365 est =300 dom.+65 import); 2020/21 (395 proj =330 dom.+65 import). Statistical Adjustments: 2019/20 (0), 2020/21 (0).