



WASDE – October 12, 2021

SUGAR: U.S. beet sugar production for 2021/22 is increased by 145,945 short tons, raw value (STRV) to 5.348 million. NASS increased its forecast of national sugarbeet production by 1.063 million tons to 35.675 million. The largest gains were in the Upper Midwest at 6.13 percent on increased yield of 27.7 tons/acre and the Great Plains at 1.71 percent on increased area. Louisiana cane sugar production for the September-August crop year is reduced by 2.29 percent to 1.783 million STRV. NASS forecasts a lower yield of 32.2 tons/acre, slightly offset by processors' forecast of slightly more sugarcane area for sugar. Fiscal year (FY) production is increased by 20,623 over the crop year total as the 2021 sugar campaign started later than originally expected and sugar expected to be produced in September is now projected to be produced after October 1 of FY 2021/22. Louisiana cane sugar production is therefore 1.804 million STRV for FY 2021/22 and 1.928 million for 2020/21.

On August 24, 2021, the USDA increased the 2020/21 raw sugar TRQ by 99,318 STRV and also extended the TRQ entry period through October 31, 2021. The proportion of the sugar entering in September was higher than what was expected last month. As a consequence, imports entering under this raw sugar TRQ are increased by 64,494 STRV for 2020/21 and decreased by the same amount for 2021/22. Raw sugar TRQ imports for 2021/22 are further reduced by 151,556 STRV as the Philippines is not expected to export any of the raw TRQ sugar allocated to it by USTR. The raw sugar TRQ shortfall is thereby raised to 250,764 STRV. High tier tariff sugar imports for 2020/21 are increased by 25,000 STRV to 205,000 on the pace to date but remain at 75,000 STRV for 2021/22.

Sugar use for 2021/22 is unchanged from last month but estimated higher in 2020/21 by 14,000 STRV with increased deliveries under the product re-export and polyhydric alcohol programs only partially offset by fewer deliveries for livestock feed. Ending stocks for 2020/21 are estimated marginally higher at 1,680,512 STRV while stocks for 2021/22 are projected lower by 38,361 STRV to 1,627,232. The 2021/22 ending stocks-to-use ratio is projected at 13.2 percent, down slightly from 13.5 percent last month.

Mexico sugar production for 2021/22 is projected at 5.940 million metric tons (MT), an increase of 131,000 over last month and 3.9 percent greater than production in 2020/21. Reports indicate that plentiful rain has alleviated much of the lingering drought effects that afflicted the previous two growing seasons. Area harvested, sugarcane yields, and sucrose recoveries are all expected to be at levels close to averages over the period since 2013/14. Exports for 2020/21 are reduced by 184,290 MT due primarily to more sugar going into deliveries for IMMEX (59,329 MT) and into ending stocks (96,754 MT). CEDES program for stocks intended for export in the fourth quarter of 2021/22 are estimated at 28,118 MT. Deliveries for human consumption are also increased by small amounts for 2020/21 (20,000 MT) and 2021/22 (15,000 MT). IMMEX for 2021/22 is increased, as well, by 18,000 MT.



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U.S. Sugar Supply and Use 1/

	2019/20	2020/21 Est.	2021/22 Proj.	2021/22 Proj.
			Sep	Oct
		<i>1,000 Short Tons,</i>	<i>Raw Value</i>	
Beginning Stocks	1783	1618	1632	1681
Production 2/	8149	9182	9162	9286
Beet Sugar	4351	5031	5202	5348
Cane Sugar	3798	4151	3960	3939
Florida	2106	2089	2005	2005
Louisiana	1566	1928	1825	1804
Texas	126	134	130	130
Imports	4165	3252	3212	3000
TRQ 3/	2152	1751	1803	1591
Other Program 4/	432	315	250	250
Other 5/	1581	1186	1159	1159
Mexico	1376	981	1084	1084
Total Supply	14097	14052	14006	13967
Exports	61	52	35	35
Deliveries	12344	12319	12305	12305
Food	12246	12200	12200	12200
Other 6/	98	119	105	105
Miscellaneous	74	0	0	0
Total Use	12479	12371	12340	12340
Ending Stocks	1618	1681	1666	1627
Stocks to Use Ratio	13	13.6	13.5	13.2

1/ Fiscal years beginning Oct 1. Data and projections correspond to category components from "Sweetener Market Data" (SMD). 2/ Production projections for 2020/21 and 2021/22 are based on Crop Production and/or processor projections/industry data and/or sugar ICEC analysis where appropriate. 3/ For 2020/21, WTO raw sugar TRQ shortfall (75) and for 2021/22 (251). 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 (206), 2020/21 (205), and 2021/22 (75). 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: 2019/20 -- 298; estimated 2020/21 -- 347; projected 2021/22 -- 358.



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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 2020/21 Est.	Sep	858	5715	75	4390	1345	913
	Oct	858	5715	67	4469	1161	1010
2021/22 Proj.	Sep	913	5809	55	4382	1482	913
	Oct	1010	5940	63	4415	1678	920

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2019/20 = 1,388; Estimated 2020/21 = 1,325; Projected 2021/22 = 1,300. Estimated Oct-Aug 2020/21 = 1,205; Estimated Oct-Aug 2019/20 = 1,267. 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: 2020/21 (486 est = 451 dom.+35 import); 2021/22 (445 proj = 410 dom.+35 import). Statistical Adjustments: 2020/21 (0), 2021/22 (0).