

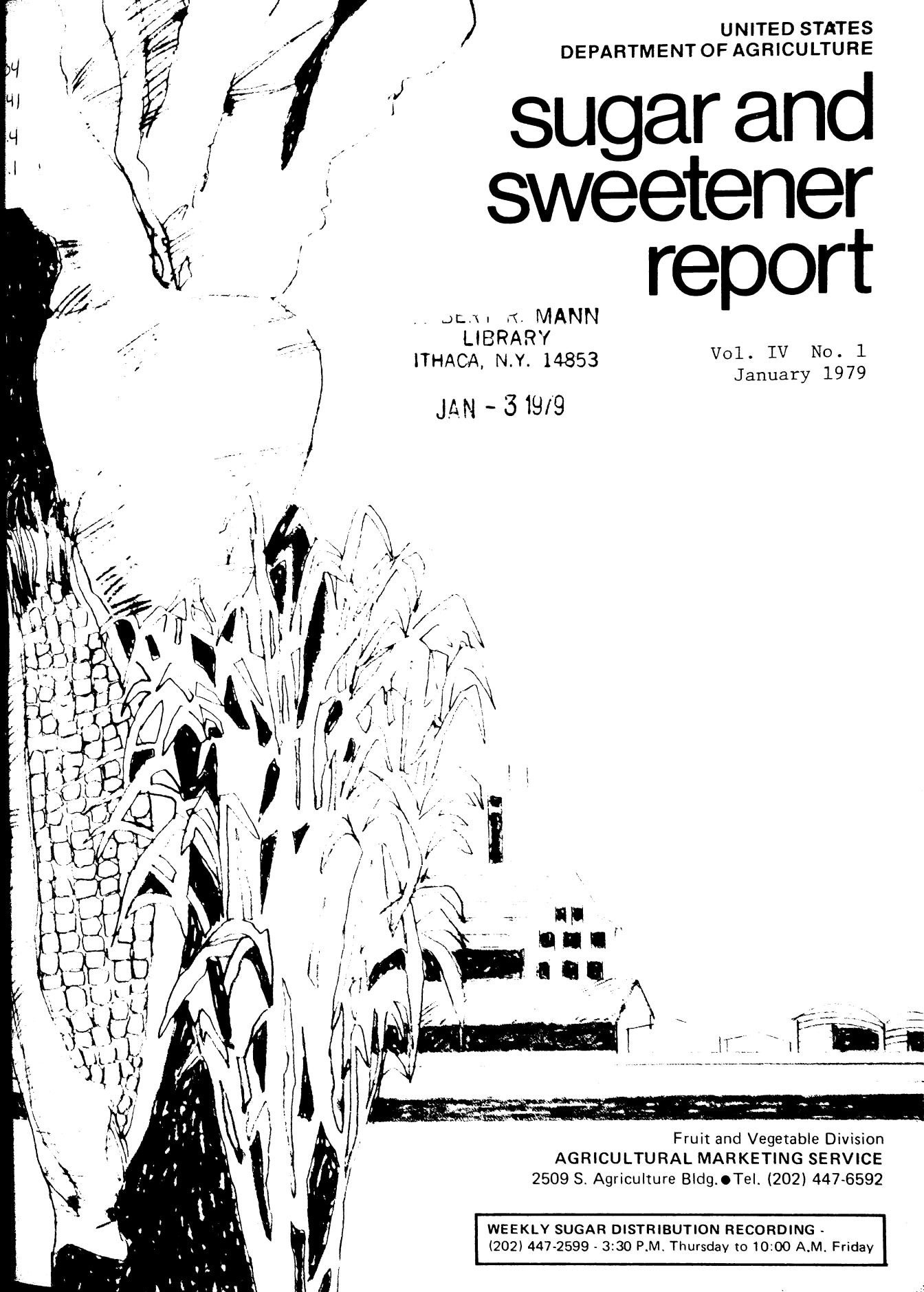
UNITED STATES  
DEPARTMENT OF AGRICULTURE

# sugar and sweetener report

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Fruit and Vegetable Division  
AGRICULTURAL MARKETING SERVICE  
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WEEKLY SUGAR DISTRIBUTION RECORDING -  
(202) 447-2599 - 3:30 P.M. Thursday to 10:00 A.M. Friday

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SUGAR MARKET HIGHLIGHTS

DELIVERIES

November - Sugar deliveries in November 1978 were 843,034 short tons, raw value, down 10 percent from November 1977. January-November deliveries were down 2½ percent from the same period a year ago.

INVENTORIES

Month End Stocks - Stocks held by primary distributors at the end of November were 2.8 million short tons, raw value up 22 percent from the end of October, but down 5½ percent the same time a year ago.

DOMESTIC PRODUCTION

Total sugar production for the mainland United States for the first 10 months of 1978 was 2.6 million short tons, raw value, down 14 percent from January-October a year ago. Hawaiian sugar production for the first 45 weeks of 1978 was 937,525 tons, down 7 percent from the five year average.

IMPORTS

Imported raw sugar receipts reported by U.S. cane refiners for January-October 1978 were 3,651,261 short tons, raw value, down 16 percent from the same period a year ago. Though the leading supplier, the Dominican Republic supplied 16 percent less than in the same period a year ago. The second ranking supplier, the Philippines, supplied 57½ percent as much as they did in January-October 1977.

Refined sugar receipts in January-October ran about 29 percent behind the same period a year ago.

REFINED SUGAR PRICES

During November list wholesale refined cane sugar prices dropped nearly 3 percent in the Northeast and 1½ percent in the Gulf area. All other cane and beet prices rose ranging from less than ½ percent in the Southeast to nearly 3 percent in the Inter-mountain-Northwest area.

TABLE 1 - U.S. SUGAR SUPPLY AND DISPOSITION BY PRIMARY DISTRIBUTORS, JANUARY-OCTOBER 1978

Item	Beet processors	Importers	Mainland	Refiners		Net total
			cane processors 1/	Raw	Refined	
Short tons, raw value						
			SUPPLY			
<u>Inventory</u> January 1, 1978	1,690,651	91,406	555,655	1,677,645	334,093	4,349,450
<u>Production and Movement</u>						
Received as direct-consumption sugar	-	76,807	-	-	5,689	82,496
Produced from beets or cane	1,813,434	-	737,378	11,229	1,735	
Less deliveries to refiners	-	-	877,157	-	-	1,686,619 <sup>2/</sup>
Receipts of raws by refiners	-	-	-	5,456,348 <sup>3/</sup>	-	
Less raws melted	-	-	-	6,397,075	-	- 940,727 <sup>4/</sup>
Refined from raws melted	-	-	-	-	6,329,519	6,329,519
Adjustments	- 448	-	+ 3,193	+ 13,381	- 981	+ 15,245
Sub-total	1,812,986	76,807	-136,586	- 916,117	6,335,962	7,173,052
<u>Net total supply</u>	3,503,637	168,213	419,069	761,528	6,670,055	11,522,502
			DISPOSITION			
<u>Distribution for Continental consumption</u> <sup>5/</sup>	2,730,366	163,784	16,489	11,443	6,229,850	9,151,932
Export	165	-	-	-	36,200	36,365
Livestock feed	-	-	-	-	10,541	10,541
Alcohol	-	-	-	-	-	-
Sub-total	2,730,531	163,784	16,489	11,443	6,276,591	9,198,838
<u>Inventory</u> October 31, 1978	773,106	4,429	402,580	750,085	393,464	2,323,664
<u>Total Distribution and Inventory</u>	3,503,637	168,213	419,069	761,528	6,670,055	11,522,502

<sup>1/</sup> Establishments that acquire no raw sugar from others for refining. Processor-refiners are included with refiners.

<sup>2/</sup> Production less deliveries of raw sugar to refiners.

<sup>3/</sup> Includes 877,157 tons received from mainland cane processors.

<sup>4/</sup> Receipts of raw sugar by refiners less melt.

<sup>5/</sup> Includes deliveries for United States Military forces at home and abroad.

TABLE 2 - DISTRIBUTION OF SUGAR BY PRIMARY DISTRIBUTORS, JANUARY-OCTOBER 1978 AND 1977

Item	:	:	:	Change 1977	
	:	1978	:	1977	
	:		:	to 1978	
Short tons, raw value					
<u>Continental United States</u>					
Refiners' raw		11,443		9,711	+ 1,732
Refiners' refined		6,276,591		6,275,053	+ 1,538
Sub-total		6,288,034		6,284,764	+ 3,270
Beet processors' refined		2,730,531		3,041,604	-311,073
Importers' direct consumption		163,784		109,188	+ 54,596
Mainland sugarcane processors'		16,489		15,041	+ 1,448
Total		9,198,838		9,450,597	-251,759
For: Alcohol		-		-	-
Export		36,365		30,041	+ 6,324
Livestock feed		10,541		67	+ 10,474
Continental consumption <u>1/</u>		9,151,932		9,420,489	-268,557
Hawaii		34,223		33,848	+ 375
Puerto Rico		74,180		131,117	- 56,937

1/ Includes deliveries for United States Military forces at home and abroad.

TABLE 3 - STOCKS OF SUGAR HELD BY PRIMARY DISTRIBUTORS IN THE CONTINENTAL UNITED STATES, OCTOBER 31, 1978 AND 1977

Item	:	:	:	Change 1977	
	:	1978	:	1977	
	:		:	to 1978	
Short tons, raw value					
Refiners' raw		750,085		845,649	- 95,564
Refiners' refined		393,464		365,821	+ 27,643
Sub-total		1,143,549		1,211,470	- 67,921
Beet processors' refined		773,106		949,155	-176,049
Importers' direct consumption		4,429		-	+ 4,429
Mainland sugarcane processors		402,580		98,774	+303,806
Total		2,323,664		2,259,399	+ 64,265

TABLE 4 - DISTRIBUTION OF SUGAR BY PRIMARY DISTRIBUTORS IN THE CONTINENTAL UNITED STATES, NOVEMBER AND JANUARY-NOVEMBER 1978 AND 1977

Item	1978		1977	
	November	January-November	November	January-November
	Short tons, raw value			
Refiners	586,598	6,874,632	660,108	6,944,872
Beet Processors' refined	246,144	2,976,675	265,759	3,307,363
Importers' direct consumption	9,292	173,076	31,216	140,404
Mainland sugarcane processors'	1,000 <u>2/</u>	17,489	975	16,016
Total	843,034	10,041,872	958,058	10,408,655
For: Alcohol	N.A.	-	-	-
Export	N.A.	36,365	956	30,997
Livestock feed	N.A.	10,541	-	67
Continental consumption <u>3/</u>	843,034	9,994,966	957,102	10,377,591

1/ Preliminary.

2/ Estimated.

3/ Includes deliveries for U.S. military forces at home and abroad.

TABLE 5 - STOCKS OF SUGAR HELD BY PRIMARY DISTRIBUTORS IN THE CONTINENTAL UNITED STATES, DECEMBER 2, 1978 AND NOVEMBER 30, 1977

Item	1978		1977		Change 1977 to 1978
	12/	11/	12/	11/	
	Short tons, raw value				
Refiners' raw	848,848		1,040,534		-191,686
Refiners' refined	299,523		328,113		- 28,590
Sub-total	1,148,371		1,368,647		-220,276
Beet processors' refined	1,192,060		1,342,045		-149,985
Importers' direct consumption	-		-		-
Mainland sugarcane processors'	500,000 <u>2/</u>		297,877		+202,123
Total	2,840,431		3,008,569		-168,138

1/ Preliminary.

2/ Estimated.

TABLE 6 - MAINLAND SUGAR: PRODUCTION AND MARKETINGS JANUARY-OCTOBER 1978 AND 1977

Item	1978	1977	Change 1977 to 1978
Short tons, raw value			
Production			
Cane			
Florida	566,681	528,195	+ 38,486
Louisiana	139,721	154,105	- 14,384
Texas	46,349	92,711	- 46,362
Sub-total	752,751	775,011	- 22,260
Domestic Beet	1,812,986	2,213,537	-400,551
Total	2,565,737	2,988,548	-422,811
Marketings			
Mainland cane			
Florida	499,749	798,220	-298,471
Louisiana	467,610	330,797	+136,813
Texas	37,143	85,455	- 48,312
Sub-total	1,004,502	1,214,472	-209,970
Beet Processors <sup>1/</sup>	2,730,531	3,041,604	-311,073
Total	3,735,033	4,256,076	-521,043

<sup>1/</sup> Includes 165 tons marketed for export in 1978 and 28 tons for export and 43 tons for feed in 1977.

TABLE 7 - REFINED SUGAR PRODUCTION AND MONTH-END STOCKS

Period	Production				Month-end stocks	
	Cane sugar refiners	Beet sugar :Old crop <sup>1/</sup>	processors : New crop	Total	Cane sugar refiners	Beet sugar processors
1,000 short tons, raw value						
<u>1977 monthly</u> average	633			285	348	1,449
<u>1977</u> December	614	-	550	550	358	1,687
<u>1978</u> January	543	341	-	341	366	1,812
February	532	169	-	169	362	1,753
March	649	140	-	140	376	1,614
April	637	114	5	119	410	1,490
May	677	141	42	183	457	1,413
June	694	75	60	135	442	1,248
July	609	17	30	47	441	1,025
August	729	18	17	35	426	712
September	647	-	115	115	400	501
October <sup>2/</sup>	619	-	529	529	393	773
November <sup>3/</sup>	494	-	665	665	300	1,192
Last 12-month average	620	-	-	252	394	1,268

<sup>1/</sup> Beet sugar made from sugarbeets of the prior crop year in the month and year shown.

<sup>2/</sup> Revised.

<sup>3/</sup> Preliminary.

TABLE 8 - SUGAR RECEIPTS OF REFINERS AND IMPORTERS BY SOURCE OF SUPPLY, JANUARY-OCTOBER 1978 AND 1977 AND TOTAL FOR CALENDAR YEAR 1977

Source of supply	Raw sugar		Direct consumption sugar		Total		January-December
	1978	1977	1978	1977	1978	1977	1977
<b>OFFSHORE</b>							
Short tons, raw value							
<b>Foreign</b>							
Argentina	204,225	181,784	-	-	204,225	181,784	266,968
Australia	112,853*	183,612	-	-	112,853	183,612	494,225
Belgium	53,967	-	1	1,690	53,968	1,690	1,690
Belize	84,764	32,442	-	-	84,764	32,442	35,549
Bolivia	62,441	24,756	-	-	62,441	24,756	49,473
Brazil	393,930	288,660	-	-	393,930	288,660	660,633
Canada	-	-	73,389	88,149	73,389	88,149	138,027
China, Republic of	56,570	86,035	16	13	56,586	86,048	86,053
Colombia	113,410	14,249	-	-	113,410	14,249	14,249
Costa Rica	78,317	95,353	1	-	78,318	95,353	95,365
Denmark	-	-	-	963	-	963	3,099
Dominican Republic	727,855	843,413	-	-	727,855	843,413	974,788
Ecuador	13,353	48,440	-	-	13,353	48,440	55,380
El Salvador	119,848	121,520	-	-	119,848	121,520	166,028
Fiji Islands	22,580	-	-	-	22,580	-	18,407
France	30,568	-	-	14,183	30,568	14,183	27,215
Germany, West	-	-	-	-	-	-	19,906
Guatemala	143,885	295,378	154	-	144,039	295,378	300,938
Haiti	5,757	-	-	-	5,757	-	-
Honduras	17,781	20,634	-	-	17,781	20,634	20,634
Hong Kong	-	-	3	1	3	1	1
India	-	-	57	32	57	32	32
Ireland	-	-	2	-	2	-	-
Japan	-	-	1	-	1	-	-
Korea	-	-	1,036	288	1,036	288	288
Malagasy Republic	14,477	12,052	-	-	14,477	12,052	12,052
Malawi	19,463	11,543	-	-	19,463	11,543	38,358
Mauritius	65,694	57,363	-	-	65,694	57,363	57,363
Mexico	-	-	159	250	159	250	274
Mozambique	12,913	83,657	-	-	12,913	83,657	97,311
Netherlands	-	-	7	-	7	-	-
Nicaragua	102,229	114,215	-	-	102,229	114,215	119,529
Panama	105,768	127,977	-	-	105,768	127,977	131,162
Peru	182,053	264,718	-	-	182,053	264,718	314,186
Philippines	588,759	1,023,401	2	-	588,761	1,023,401	1,442,991
Romania	13,209	-	-	-	13,209	-	-
South Africa	17,766	236,691	-	-	17,766	236,691	274,227
Swaziland	74,586	17,540	-	-	74,586	17,540	61,855
Sweden	-	-	3	1	3	1	2
Thailand	48,549	-	-	-	48,549	-	-
United Kingdom	-	-	43	44	43	44	44
Uruguay	8,220	-	-	-	8,220	-	-
West Indies	155,471**	159,744	2	-	155,473	159,744	159,744
<b>Total Foreign</b>	<b>3,651,261</b>	<b>4,345,177</b>	<b>74,876</b>	<b>105,614</b>	<b>3,726,137</b>	<b>4,450,791</b>	<b>6,138,048</b>
<b>Domestic</b>							
Hawaii	872,610	860,496	5,689	9,752	878,299	870,248	979,473
Puerto Rico	50,500	81,495	1,931	3,574	52,431	85,069	101,948
<b>Total Domestic</b>	<b>923,110</b>	<b>941,991</b>	<b>7,620</b>	<b>13,326</b>	<b>930,730</b>	<b>955,317</b>	<b>1,081,421</b>
<b>Total Offshore</b>	<b>4,574,371</b>	<b>5,287,168</b>	<b>82,496</b>	<b>118,940</b>	<b>4,656,867</b>	<b>5,406,108</b>	<b>7,219,469</b>
Mainland Cane area	888,386	1,170,685	1,735	-	890,121	1,170,685	1,567,106
Acquired for reprocessing and samples	4,820	1,683	-	-	4,820	1,683	2,233
<b>GRAND TOTAL</b>	<b>5,467,577</b>	<b>6,459,536</b>	<b>84,231</b>	<b>118,940</b>	<b>5,551,808</b>	<b>6,578,476</b>	<b>8,788,778</b>

1/ Refined sugar received by refiners.

2/ Refined sugar produced direct from cane by processor-refiner. \*Includes 6,516 tons reported by importer to have cleared customs in 1977. \*\*Includes 20,760 tons from Barbados, 31,124 tons from Guyana, 32,969 tons from Jamaica, 21568 tons from St. Kitts and 49,050 tons from Trinidad.



TABLE 9 - UNITED STATES EXPORTS OF RAW AND REFINED SUGAR, THIRD QUARTER 1978 1/

Country or area	January-June	July	August	September	January-September
Short tons, raw value					
Bahamas	497	22	101	105	725
Bermuda	50	6	7	-	63
Canada	2,450	299	429	510	3,688
Cayman Islands	34	10	11	34	89
Denmark	20	-	7	6	33
Dominican Republic	54	7	-	1	62
Finland	173	-	-	-	173
Guinea	256	-	-	-	256
Hong Kong	111	84	-	-	195
Iceland	2,421	-	-	-	2,421
Iran	19	-	6	-	25
Italy	134	-	9	1	144
Jamaica	121	-	11	-	132
Japan	391	-	3	56	450
Lebanon	60	-	1	-	61
Leeward-Windward Islands	39	16	6	12	73
Mexico	170	-	1	2	173
Netherlands	26	22	73	120	241
Netherlands Antilles	1,182	415	177	584	2,358
Nicaragua	29	-	-	-	29
Nigeria	1,218	-	-	-	1,218
Panama	76	6	4	1	87
Qatar	36	-	-	-	36
Saudi Arabia	225	3	3	22	253
Singapore	99	-	7	-	106
Spain	25	-	1	-	26
Sweden	144	24	-	47	215
Syria	26	-	-	-	26
Trust Territory					
Pacific Islands	610	90	221	26	947
Turks and Caicos	36	-	1	1	38
W. Samoa	81	17	-	-	98
Venezuela	41	1	-	-	42
Other <u>2/</u>	187	32	56	25	300
<b>Total</b>	<b>11,041</b>	<b>1,054</b>	<b>1,135</b>	<b>1,553</b>	<b>14,783</b>

1/ Source: U.S. Bureau of Census. 2/ Countries receiving less than 25 tons.

TABLE 10 - PRIMARY DISTRIBUTION OF SUGAR CONTINENTAL UNITED STATES, BY REGION, JANUARY-OCTOBER 1978 AND 1977

Region <u>1/</u>	Cane sugar		Beet		Mainland cane		Total all primary	
	refiners		processors		sugar mills		distributors	
	1978	1977	1978	1977	1978	1977	1978	1977
Thousands of hundredweights <u>2/</u>								
New England	5,858	5,910	61	260	-	-	5,919	6,170
Mid-Atlantic	27,079	27,277	250	1,453	2	20	27,331	28,750
North Central	26,638	26,518	31,466	33,278	277	240	58,381	60,036
Southern	49,216	49,790	2,669	2,821	31	24	51,916	52,635
Western	9,842	8,093	16,529	18,928	2	-	26,373	27,021
Unspecified	242	-	60	107	-	-	302	107
<b>Grand total</b>	<b>118,875</b>	<b>117,588</b>	<b>51,035</b>	<b>56,847</b>	<b>312</b>	<b>284</b>	<b>170,222</b>	<b>174,719</b>

1/ New England States - include Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut. Middle Atlantic States - include New York, New Jersey, and Pennsylvania. North Central States - include Ohio, Indiana, Illinois, Michigan, Wisconsin, Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, and Kansas. Southern States - include Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida, Kentucky, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, Oklahoma, and Texas. Western States - include Alaska, Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada, Washington, Oregon, and California. 2/ Reported as produced or imported and delivered except liquid sugar which is on a sugar solids content basis.







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TABLE 13 - SUGAR FUTURES AVERAGE SETTLEMENT PRICE AND OPEN CONTRACTS WORLD NO. 11 BULK CONTRACTS 1/

Month of Contract	Jan. 1979	March 1979	May 1979	July 1979	Sept. 1979	Oct. 1979	Jan. 1980	March 1980
<b>Trading Month</b>								
AVERAGE MONTHLY SUGAR FUTURES SETTLING PRICE - CENTS PER POUND								
<u>1977</u>								
November	10.46	10.42						
December	10.49	10.78	10.96					
<u>1978</u>								
January	10.49	10.78	10.95					
February	10.06	10.33	10.54	10.07				
March	9.16	9.49	9.72	9.91				
April	8.71	9.12	9.33	9.52	9.71			
May	8.25	8.63	8.80	8.97	9.13	9.23		
June	7.92	8.20	8.39	8.57	8.75	8.87		
July	6.87	7.12	7.28	7.47	7.65	7.77		
August	7.47	7.67	7.83	8.02	8.21	8.31		
September	8.61	8.78	8.98	9.18	9.37	9.48	9.63	
October	9.11	9.36	9.52	9.66	9.82	9.90	10.02	10.32
November	8.30	8.77	8.97	9.17	9.37	9.48	9.67	10.03
<u>1977</u>	OPEN CONTRACTS LAST TRADING DAY OF MONTH							
November	2	260						
December	3	482	67					
<u>1978</u>								
January	7	713	374					
February	9	1,108	618	96				
March	31	2,713	880	216				
April	45	3,750	1,566	551	143			
May	60	6,401	2,053	796	313	255		
June	75	9,091	2,586	1,044	413	647		
July	89	11,622	3,080	1,213	574	1,026		
August	117	14,205	4,323	1,562	831	1,188		
September	186	19,344	4,419	2,660	1,538	1,989	3	
October	214	18,193	5,398	3,372	1,872	2,464	2	53
November	203	16,138	5,777	3,460	2,199	2,680	3	184

1/ Average monthly settlement price for No. 11 contract of the New York Coffee and Sugar Exchange F.O.B. and stowed in one of more than 20 Caribbean, South American, Oceanic, African and Asian countries. Each contract is 50 long tons.