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Sugar and Sweeteners Outlook

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Higher Projected Sugar Production and Deliveries in the United States; Reduced Projected Export Limit for Imports from Mexico in 2015/16

The next release is
January 19, 2015

Approved by the
World Agricultural
Outlook Board.

U.S. sugar production in 2015/16 is projected at 8.991 million short tons, raw value (STRV) in the December *World Agricultural Supply and Demand Estimates* (WASDE), an 181,000-STRV increase from the previous month's report. Cane sugar production accounts for 133,000 STRV of that increase, as higher expectations for production in Florida more than offset a reduced outlook for Louisiana. Projected beet sugar is also increased from the previous month's projection by 83,000 STRV, which would result in a fiscal year record for beet sugar production.

Domestic sugar deliveries in 2015/16 are projected to be 12.090 million STRV, a 170,000-STRV increase from the previous month. The increase stems from higher projected deliveries for food and beverage consumption. Despite relatively large volumes of direct consumption imports (DCI) in the final quarter of the 2014/15 fiscal year, total deliveries for the quarter remained in line with longer-term trends established over the past 15-20 years in the U.S. sugar market. As a result, projections for 2015/16 reflect a continuation of these trends, which implies a slight increase in deliveries in 2015/16 compared with the previous year. Projected U.S. sugar exports and other deliveries in 2015/16 both remain unchanged at 200,000 STRV and 135,000 STRV, respectively.

Estimated U.S. sugar imports in 2014/15 are decreased 16,000 STRV from the previous month, totaling 3.553 million STRV. Imports under quota are increased slightly less than 2,000 STRV due to revised entry data for Canada under the refined TRQ program. This increase is more than offset by an 18,000-STRV reduction in estimated imports from Mexico, which is due to a known revision in U.S. Census Bureau import statistics that will be published by the agency at a later date.

For 2015/16, U.S. sugar imports are projected to total 3.192 million STRV, a 207,000 STRV reduction from the November report. Imports under quota programs are increased a relatively small 1,000 STRV due to increased imports expected under the Panama free-trade agreement. Imports from Mexico are projected to be reduced 208,000 STRV, however, totaling 1.333 million STRV. This is in line with the calculation of U.S. Needs based on the December WASDE, in accordance with the Agreement "Suspending the Countervailing Duty Investigation on Sugar From Mexico," signed by the U.S. Department of Commerce and the Government of Mexico in December 2014.

Strong National Beet Crop and Florida Cane Crop Lead to Increased Domestic Sugar Production

U.S. sugar production in 2014/15 is estimated at 8.649 million short tons, raw value (STRV). The first complete-year estimates for 2014/15 were reported in the previous month, resulting in no changes to the current estimate. U.S. sugar production for 2015/16 is projected at 8.991 million STRV, up 181,000 STRV from the previous month's projection.

The 2015/16 sugarbeet crop is forecast at 35.216 million short tons by USDA's National Agricultural Statistics Service (NASS), unchanged from the previous month's forecast. If realized, this would be the second largest sugarbeet crop in history, behind the 2012/13 crop that totaled slightly higher at 35.224 million tons. The sugarbeet crop yield is expected to be a record at 30.8 tons per acre, aided by early planting in the spring and relatively favorable growing conditions in sugarbeet production regions throughout the spring and summer.

Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), December 2015.

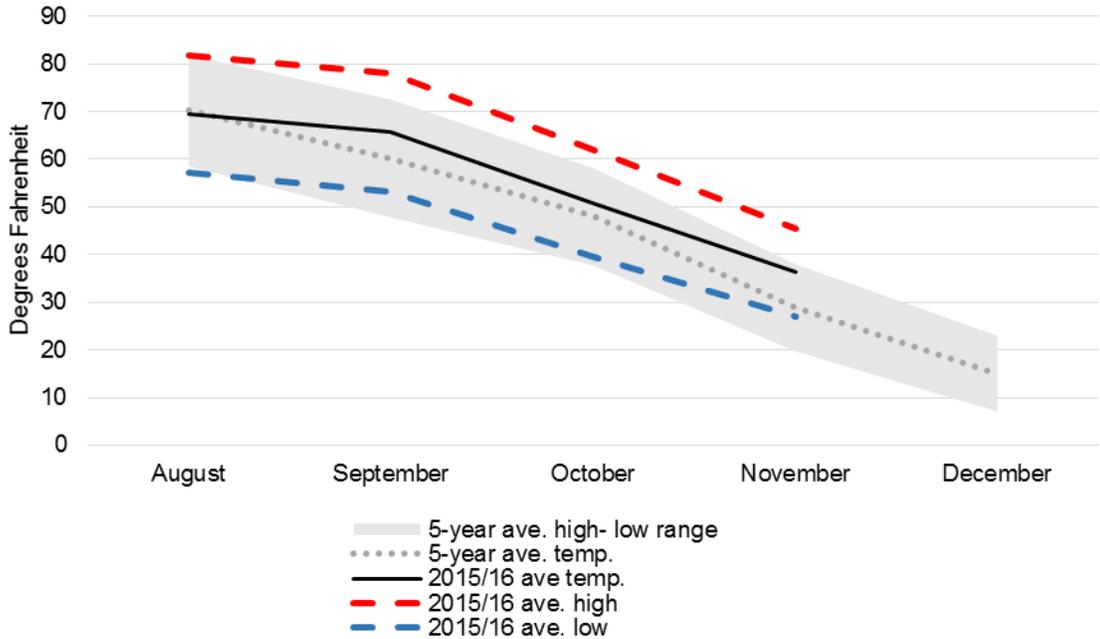
Items	2013/14	2014/15 (estimate)	2015/16 (forecast)	2013/14	2014/15 (estimate)	2015/16 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	2,158	1,810	1,767	1,958	1,642	1,603
Total production	8,462	8,649	8,991	7,676	7,846	8,157
Beet sugar	4,794	4,893	5,158	4,349	4,439	4,679
Cane sugar	3,667	3,755	3,833	3,327	3,407	3,478
Florida	1,763	1,975	2,073	1,599	1,791	1,881
Louisiana	1,591	1,512	1,465	1,444	1,372	1,329
Texas	145	123	130	132	112	118
Hawaii	168	146	165	153	132	150
Total imports	3,742	3,569	3,192	3,394	3,238	2,895
Tariff-rate quota imports	1,302	1,534	1,529	1,181	1,392	1,387
Other program imports	305	471	315	277	427	286
Non-program imports	2,135	1,564	1,348	1,937	1,419	1,222
Mexico	2,130	1,549	1,333	1,932	1,406	1,209
Total supply	14,362	14,028	13,949	13,029	12,726	12,654
Total exports	306	185	200	278	168	181
Miscellaneous	0	0	0	0	0	0
Deliveries for domestic use	12,246	12,076	12,090	11,109	10,955	10,968
Transfer to sugar-containing products for exports under re-export program	82	103	100	74	93	91
Transfer to polyhydric alcohol, feed, other alcohol	29	28	35	27	25	32
Commodity Credit Corporation (CCC) sale for ethanol, other	316	0	0	287	0	0
Deliveries for domestic food and beverage use	11,819	11,946	11,955	10,722	10,837	10,845
Total Use	12,552	12,261	12,290	11,387	11,123	11,149
Ending stocks	1,810	1,767	1,659	1,642	1,603	1,505
Private	1,810	1,767	1,659	1,642	1,603	1,505
Commodity Credit Corporation (CCC)	0	0	0	0	0	0
Stocks-to-use ratio	14.42	14.41	13.50	14.42	14.41	13.50

Source: U.S. Dept. of Agriculture, Economic Research Service, Sugar and Sweetener Outlook.

Beet sugar production in 2015/16 is projected to be 5.158 million STRV, an 83,000-STRV increase from the November projection. This would be a U.S. beet sugar production fiscal year (October-September) record if realized. The current crop year (August-July) beet sugar production is projected at 5.373-million STRV, which would be the second largest total behind 2012/13. An early start to the harvest season allowed for August and September beet sugar production to be reported at 688,000 STRV—which is accounted for in 2014/15 fiscal year production. This total is also the second-largest early season production level in U.S. history, after August and

September of 2012, which saw 708,000 STRV of early-season production. An unseasonably warm fall throughout much of the sugarbeet production regions tempered the harvest pace, as warm temperatures were not conducive to storing beets, resulting in a harvest that was in line with the 5-year average pace. Processors continue to report strong sugar content levels for the crop, which supports the record-level production projections. Warm weather conditions have persisted in nearly all beet-producing regions, however, in particular in the Upper Midwest, through the beginning of December. This poses a challenge for the management of sugarbeet storage piles, especially for beets not stored in ventilated facilities, which can result in a reduction of harvested beets sliced and of sugar extracted from those beets. Processors increased their forecast of the sugarbeet shrink in their December report, which would mean fewer harvested beets processed for sugar extraction throughout the winter slicing campaign. Weather conditions in the production regions in Minnesota and North Dakota, which account for 48 percent of the forecast 2015/16 sugarbeet crop, have been particularly warm. Producers in these States rely upon the extremely cold temperatures in the region to maintain the quality and sugar content of the beets as they store over the winter. Weather conditions in all regions, but in particular in North Dakota and Minnesota, will be a key variable for future beet sugar production projections. Cold temperatures conducive to storing beets could improve the prospects for the volume of beets sliced and sugar recovery, while warm or variable temperatures have the potential to degrade the harvested beet quality and reduce sugar production.

Figure 1
Actual and average monthly temperatures, Fargo, ND



Source: Office of the Chief Economist, USDA.

Cane sugar production for 2015/16 is projected to be 3.833 million STRV, a 98,000-STRV increase from the November report. The change from the previous month is due to an increase in cane sugar from Florida more than offsetting a projected decline in production in Louisiana. The December NASS *Crop Production* report provided the first forecasts of sugarcane harvested both for sugar and for seed, as well as updating total sugarcane harvest for the year. Sugarcane harvested for sugar in the United States in 2015/16 is forecast at 847,500 acres in the December report, a 2.7 percent increase in area from 2014/15. Sugarcane production for sugar in 2015/16 is forecast to increase 5.8 percent from the previous year to 30.582 million tons, however, due to better expected yields for the 2015/16 crop.

Table 2 -- Sugarcane harvested area, yield, production, and sugar production, by State

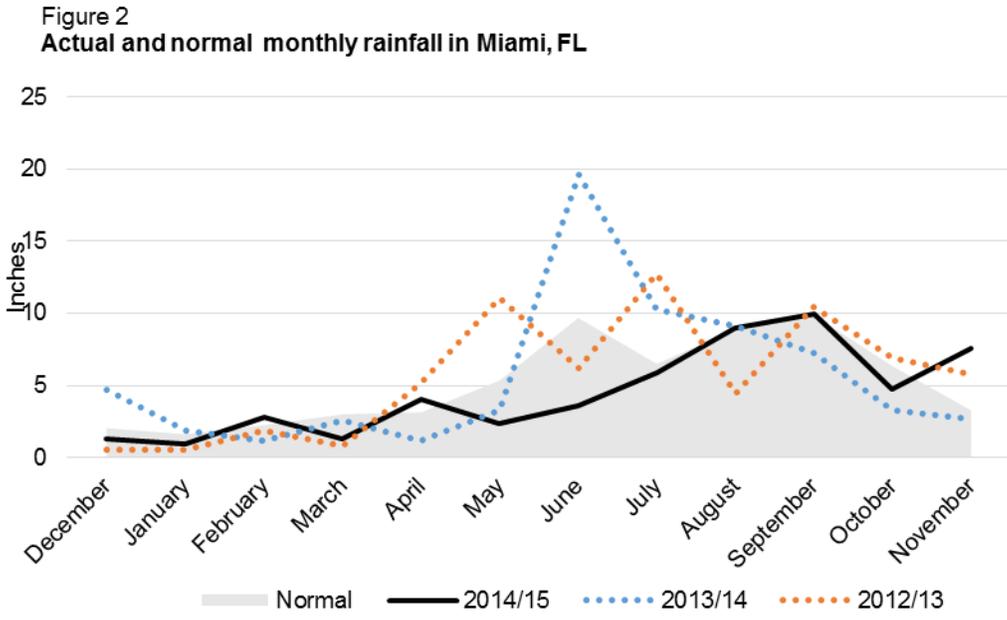
	Units	2013/14	2014/15	2015/16	
		Final	Estimate	Nov. Forecast	Dec. Forecast
Florida					
Harvested area	1,000 acres	416	408	415	425
Harvested area for sugar	1,000 acres	400	392	N/A	409
Harvested area for seed	1,000 acres	16	16	N/A	16
Yield for sugar	Tons per acre	34.3	38.4	N/A	39.8
Production for sugar	1,000 tons	13,720	15,053	N/A	16,278
Sugar production	1,000 STRV	1,763	1,975	1,940	2,073
Louisiana					
Harvested area	1,000 acres	442	411	410	410
Harvested area for sugar	1,000 acres	410	386	N/A	385
Harvested area for seed	1,000 acres	32	25	N/A	25
Yield for sugar	Tons per acre	30.5	29.5	N/A	30
Production for sugar	1,000 tons	12,505	11,387	N/A	11,550
Sugar production	1,000 STRV	1,591	1,512	1,500	1,465
Hawaii					
Harvested area	1,000 acres	18	18	19	19
Harvested area for sugar	1,000 acres	16	16	N/A	17
Harvested area for seed	1,000 acres	2	2	N/A	2
Yield for sugar	Tons per acre	87.2	78.8	N/A	86.2
Production for sugar	1,000 tons	1,352	1,261	N/A	1,422
Sugar production	1,000 STRV	168	146	165	165
Texas					
Harvested area	1,000 acres	35	33	38	39
Harvested area for sugar	1,000 acres	34	32	N/A	37
Harvested area for seed	1,000 acres	1	2	N/A	2
Yield for sugar	Tons per acre	42.4	37.9	N/A	36
Production for sugar	1,000 tons	1,446	1,194	N/A	1,332
Sugar production	1,000 STRV	145	123	130	130
United States					
Harvested area	1,000 acres	911	870	882	893
Harvested area for sugar	1,000 acres	860	826	N/A	848
Harvested area for seed	1,000 acres	51	45	N/A	45
Yield for sugar	Tons per acre	33.8	35	N/A	36.1
Production for sugar	1,000 tons	29,023	28,895	N/A	30,582
Sugar production	1,000 STRV	3,667	3,755	3,735	3,833

Note: N/A represent fields that were not forecast prior to the December report.

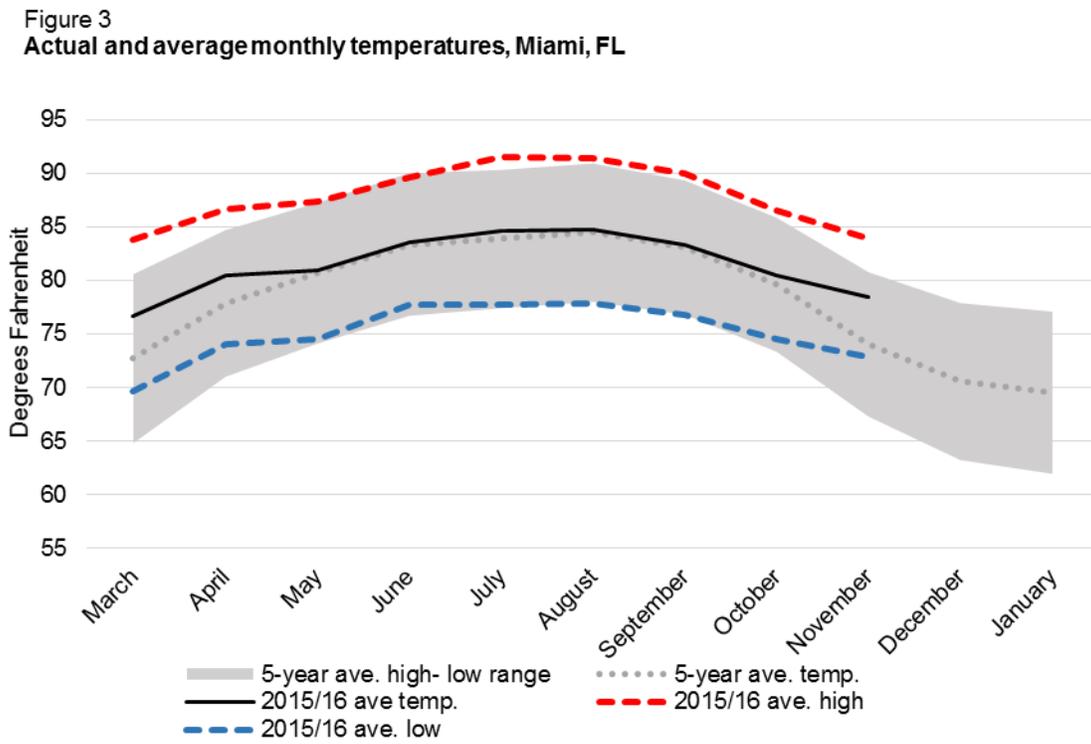
Source: National Agricultural Statistics Service, USDA; Economic Research Service, USDA.

Cane sugar production in Florida is projected to total 2.073 million STRV, a 98,000-STRV increase from the November projection. This would be the highest production level in the State since 2003/04. Producers in the region have experienced very favorable growing conditions, with relatively dry conditions throughout most of the summer and temperatures remaining relatively hot in the fall, promoting cane growth. The most recent NASS report forecasts a Florida harvest of 409,000 acres of sugarcane for sugar for the 2015/16 crop year—up from 392,000 the

previous year—and yields increasing to 39.8 tons per acre in 2015/16, 3.6 percent above the previous year. Total sugarcane harvested in the State increased from 410,000 acres in the November report to 425,000 acres in the latest report, resulting in a total increase in sugarcane production of 4.7 percent over the previous month’s forecast. Similar to projected sugar production, the forecast sugarcane for sugar production of 16.278 million tons, if realized, would be the largest total for the State since 2003/04.



Source: Office of the Chief Economist, USDA.



Source: Office of the Chief Economist, USDA.

Cane sugar production in Louisiana is projected to total 1.465 million STRV for 2015/16, a 35,000-STRV decline from the previous month's projection. Relatively wet conditions in cane-producing regions of the State during October and November have hampered the crop's potential. The NASS forecast for total sugarcane production in the State was reduced due to sugarcane yields decreasing by 1.0 tons per acre from the previous month to 30.0 tons per acre. Sugarcane for sugar-harvested area is forecast to be 385,000 acres—down 1,000 acres from 2014/15 levels. Yields are forecast at 30.0 tons per acre, up from the previous year's 29.5 tons per acre, resulting in a forecast for sugarcane production for sugar to increase 1.4 percent to 11.550 million STRV. Wet weather conditions likely to adversely affect the cane's quality and the currently expected end dates for the mills in the region result in reduced cane sugar production in the State compared to the previous month's projection.

Cane sugar production in Texas for 2015/16 is projected to total 130,000 STRV, unchanged from the previous month's estimate. Sugarcane production for sugar is forecast to be 37,000 acres in 2015/16, up from the previous year's total of 31,500. The 2014/15 crop was hampered by continual weather-related challenges for producers in the region. While harvested area is expected to rebound in 2015/16, the later harvest and time spent in the field for the previous year's crop are expected to result in even lower yields for 2015/16 of 36.0 tons per acre, compared with 37.9 tons per acre the previous year.

Cane sugar production in Hawaii is also unchanged from the previous month's projection at 165,000 STRV. The 2015/16 production increase from the previous year is expected to be aided by a 3.1-percent increase in harvested area for sugar and a 9.3-percent increase in yield compared with the previous year.

Domestic Food and Beverage Deliveries Increase in Final Quarter of FY2015, in Line with Longer-Term Trends

U.S. domestic sugar deliveries for 2014/15 are estimated at 12.060 million STRV, a 16,000-STRV reduction from the previous month's report. This reduction was the result of an adjustment to the miscellaneous category of food deliveries that balances reported supply, use, and ending stocks, which was altered due to updated trade data.

Domestic deliveries for 2015/16 are projected to total 11.955 million STRV, a 170,000-STRV increase from the previous month. Deliveries for food and beverages in the final quarter of the 2014/15 fiscal year totaled 3.250 million STRV, a 2.7 percent increase from the same quarter the previous year. There has been considerable market focus on direct consumption imports (DCI) from entities that do not report to the USDA's Farm Service Agency and on the potential for sugar to be marketed at a date later than when the delivery was recorded (the month that it was recorded as imported). A potential consequence of such marketing behavior would be sugar counted as deliveries in the 2014/15 fiscal year displacing sugar coming to market in the 2015/16 fiscal year.

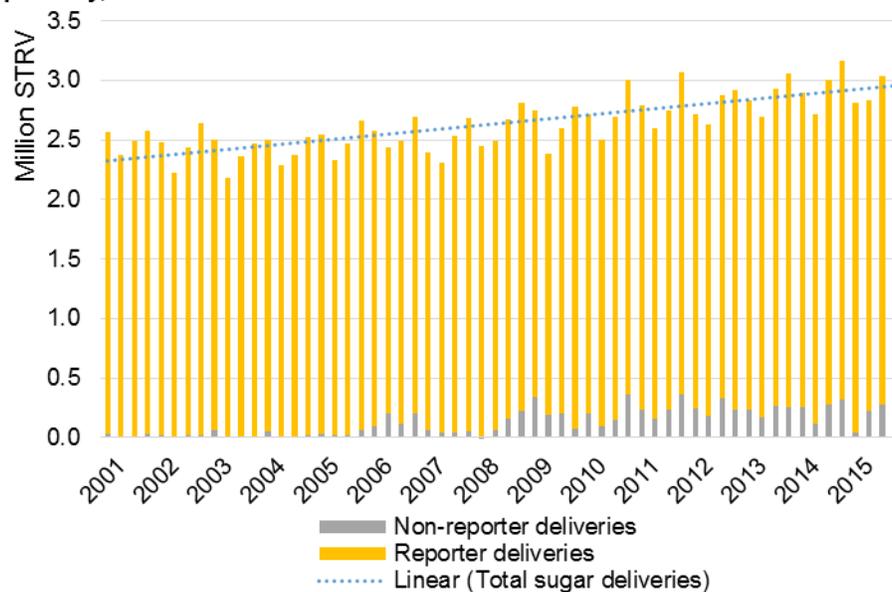
For the July to September quarter in FY2015, DCI accounted for 12.9 percent of total deliveries compared with 10.2 percent the previous year. This is the highest proportion for this quarter since DCI became a prominent feature of the U.S. sugar market. This level is still comparable to previous years, however, including 2009/10 (12.0 percent) and 2011/12 (11.7 percent). Similarly, deliveries from reporting beet and cane sugar producers declined 0.4 percent compared with the same quarter the previous year but remained larger than the past several years. Accounting for seasonality and longer term growth trends of total deliveries, statistical analysis indicates that there was not a significant change in total deliveries for the final quarter of the 2014/15 fiscal year to indicate a structural change in demand or a shift in marketing patterns. As a result, projected 2015/16 deliveries for food and beverages were adjusted to better reflect a continuation of longer term trends in the domestic sweetener market.

Table 3 -- U.S. food and beverage sugar deliveries, July-Sept. quarter

Calendar year	Total deliveries 1,000 short tons, raw value	Reporter deliveries	Non-reporter deliveries	Proportion of non-reporter Percent
2008	2,807	2,589	219	7.8%
2009	2,780	2,712	68	2.4%
2010	3,005	2,644	362	12.0%
2011	3,066	2,706	359	11.7%
2012	2,918	2,686	233	8.0%
2013	3,059	2,805	254	8.3%
2014	3,166	2,844	322	10.2%
2015	3,251	2,833	418	12.9%

Source: Economic Research Service, USDA.

Figure 4
U.S. sugar deliveries for human consumption, quarterly, Q4 2000 to Q3 2015



Source: Economic Research Service, USDA

Other domestic deliveries and exports for 2015/16 remain unchanged from the November projections, totaling 135,000 STRV and 200,000 STRV, respectively. Projected total use is 12.290 million STRV, reflecting the 170,000-STRV increase in domestic food and beverage deliveries from the previous month's projections.

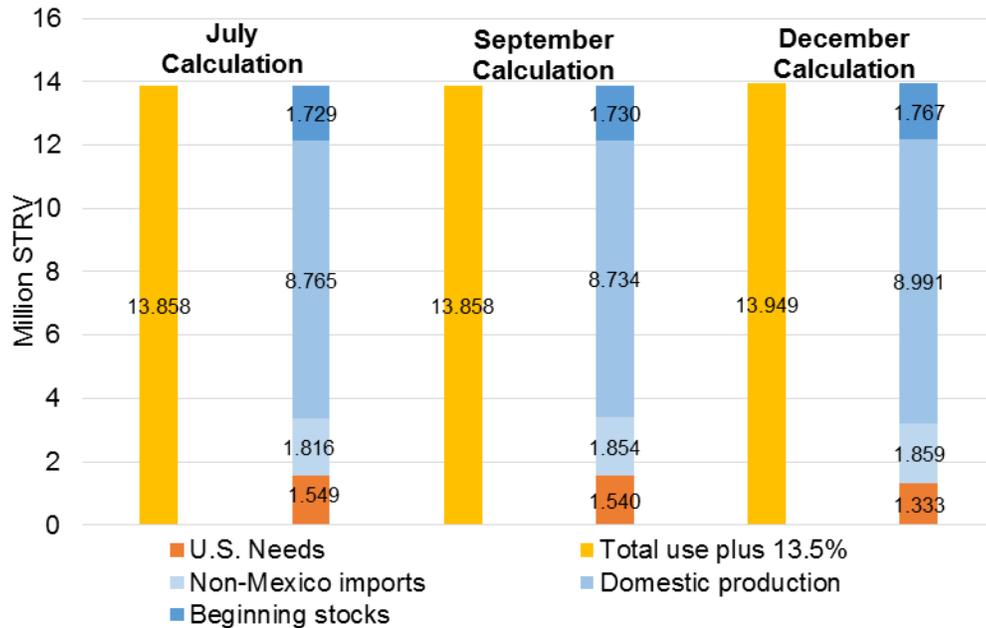
U.S. Sugar Imports Reduced as Lower U.S. Sugar Needs Reduce Potential for Mexican Sugar Exports to the United States

U.S. sugar imports for 2014/15 are estimated at 3.553 million STRV, a 16,000-STRV decline from the previous month's estimate. Imports from quota programs were increased by nearly 2,000 STRV due to an upward revision to imports from Canada under the refined sugar quota. This increase is more than offset by an 18,000-STRV reduction in imports from Mexico due to a known correction in August import data for the Baltimore District port, which has not yet been reflected in U.S. Census Bureau trade data but is expected to be included in future revisions by the agency.

Sugar imports for 2015/16 are projected at 3.192 million STRV, a 207,000-STRV reduction from the November projection. Projected imports under quota programs are increased by a slight 1,000 STRV to 1.529 million STRV

due to an increase in expected imports from Panama under the terms of the bilateral free-trade agreement. Imports from Mexico in 2015/16 are projected to total 1.333 million STRV, reflecting the calculation of U.S. Needs in the December WASDE report as defined in the “Agreement Suspending the Countervailing Duty Investigation on Sugar From Mexico” signed in December 2014. This represents a 208,000-STRV reduction from the previous month’s projection, which was based upon the calculation of U.S. Needs from the September WASDE.

Figure 5
Calculation of U.S. Needs, 2015/16 projections



Note: U.S. Needs calculation done by U.S. Department of Commerce using WASDE figures as inputs. Figure based on WASDE reports, not official U.S. Department of Commerce announcements. Source: Economic Research Service, USDA.

Ending stocks for 2015/16 are projected to be 1.659 million STRV—a 196,000-STRV decline from the previous month’s report. The stocks-to-use ratio is reduced from 15.3 percent in the November report to 13.5 percent in the December report. This is primarily the result of the terms of the suspension agreements, as the calculation of U.S. Needs implies such a stocks-to-use ratio.

Mexico’s 2015/16 Milling Season Is Underway

Total sugar supplies in Mexico in 2014/15 are estimated to be 6.944 million metric tons, actual value (MT), a 24,000-MT reduction from the November estimate. Estimated beginning stocks and production both remain unchanged at 831,000 MT and 5.985 million MT, respectively. Estimated imports account for the entire reduction—and, in particular, imports for the IMMEX program—total 128,000 MT, including a 121,000-MT calculated total for the IMMEX program.

Projected total supply for 2015/16 remains unchanged from the previous month’s projection at 7.022 million MT. Beginning stocks are projected to be 811,000 MT, and imports are projected to total 155,000 MT. Projected production remains unchanged from the previous month at 6.056 million MT. The cane milling season has begun in Mexico, and Mexico’s *Comité Nacional Para Desarrollo de la Caña de Azúcar’s* (Conadesuca) has issued its first reports for the 2015/16 season, with the majority of Mexican sugar mills expected to begin processing by the first week of December. Information from the early reports did not merit a change in the current outlook for the Mexican sugarcane crop.

Table 4 -- Mexico sugar supply and use, 2012/13 - 2013/14 and projected 2014/15, December 2015

Items	2013/14	2014/15 (estimate)	2015/16 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	1,460	831	811
Production	6,021	5,985	6,056
Imports	131	128	155
Imports for consumption	9	8	10
Imports for sugar-containing product exports (IMMEX) 1/	123	121	145
Total supply	7,613	6,944	7,022
Disappearance			
Human consumption	4,098	4,408	4,388
For sugar-containing product exports (IMMEX)	324	337	337
Statistical adjustment	-151	-54	
Total	4,271	4,691	4,725
Exports	2,511	1,442	1,150
Exports to the United States & Puerto Rico	1,823	1,311	1,140
Exports to other countries	689	131	10
Total use	6,782	6,134	5,875
Ending stocks	831	811	1,147
	1,000 metric tons, raw value		
Beginning stocks	1,548	881	859
Production	6,383	6,344	6,419
Imports	139	136	165
Imports for consumption	9	8	11
Imports for sugar-containing product exports (IMMEX)	130	128	154
Total supply	8,069	7,361	7,444
Disappearance			
Human consumption	4,344	4,673	4,651
For sugar-containing product exports (IMMEX)	343	357	357
Statistical adjustment	-160	-57	0
Total	4,527	4,973	5,008
Exports	2,662	1,529	1,219
Exports to the United States & Puerto Rico	1,932	1,389	1,209
Exports to other countries	730	139	11
Total use	7,189	6,502	6,228
Ending stocks	881	859	1,216
Stocks-to-human consumption (percent)	20.3	18.4	26.1
Stocks-to-use (percent)	12.3	13.2	19.5
High fructose corn syrup (HFCS) consumption (dry weight)	1,372	1,444	1,497

1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

Source: USDA, *World Agricultural Supply and Demand Estimates* and Economic Research Service, *Sugar and Sweeteners Outlook*; Conadesuca.

Mexican Domestic Deliveries for Human Consumption Unchanged, Adjustments Made to IMMEX Deliveries

Estimated 2014/15 Mexican domestic deliveries are reduced by a relatively minor 8,000 MT to 4.691 million MT. Deliveries for domestic human consumption remain unchanged from the previous month's estimate at 4.408 million MT. Deliveries to the IMMEX are estimated at 337,000 MT, a 13,000-MT increase from the previous month to reflect complete 2014/15 data reported by the Mexican Government. The miscellaneous category used to balance reported supply, use, and inventory data is reduced to -54,000 MT from the previous month's calculation of -32,000 MT. This change is the result of adjustments to reported U.S. imports (on which Mexican export estimates are based) and Mexican trade and IMMEX data.

Projected Mexican domestic deliveries 2015/16 is increased 13,000 MT from the November projection, totaling 4.725 million MT. Deliveries for domestic human consumption are unchanged from the previous month, at 4.388 million MT. Projected deliveries for the IMMEX program are increased 13,000 MT to 337,000 MT, in line with changes to the previous year's estimate.

Mexico's sugar exports for 2014/15 are reduced 15,000 MT to 1.442 million MT, including exports to the United States of 1.311 million MT. These change reflect adjustments made to U.S. imports. For 2015/16, exports are reduced 178,000 MT, all of which is accounted for by a reduction in exports to the United States reflecting the updated calculation of U.S. Needs as defined by the suspension agreement between the U.S. Department of Commerce and Government of Mexico signed in December 2014. Mexico is projected to export 1.150 million MT in 2015/16, of which 1.140 million MT is projected to be shipped to the United States.

Mexican Ending Stocks in 2015/16 Suggest an Amply Supplied Market

Ending stocks in Mexico for 2015/16 projected to total 1.147 million MT, up from the previous month's projection of 982,000 MT, primarily due to the reduction in projected exports. This increases the stocks-to-consumption ratio to 26.1 percent, compared with 22.4 percent projected in November. This level is relatively high by historical standards.

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Sugar and Sweeteners Outlook <http://www.ers.usda.gov/Publications/SSS/WASDE> <http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documented=1194>
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