



Sugar and Sweeteners Outlook

Michael McConnell, coordinator

Increased Imports and Production Raise Ending Stocks for 2017/18

U.S. sugar production projections for 2017/18 are raised slightly in the March report, totaling 9.240 million short tons, raw value (STRV). The raised projection is due to a 10,000-STRV increase to cane sugar production in Texas. Beet sugar production remains unchanged, as weather conditions remain favorable to maintaining storage and quality conditions for sugarbeets. Imports are raised 151,000 STRV compared with the previous month. The increase is due to higher projected imports under the re-export program and a slight increase in imports from Mexico. Projected exports are raised 50,000 STRV based on pace to date. There are no changes in projected domestic deliveries. As a result, ending stocks are raised 111,000 STRV, with the stocks-to-use ratio totaling 15.5 percent.

Mexico sugar production projections for 2017/18 are reduced 50,000 metric tons (MT), actual value, from the previous report. The reduction is based on the pace of the sugarcane harvest thus far in the year. Projected imports are increased 35,000 MT, as shipments from the United States have continued in 2017/18. No changes were made to domestic use of sugar or high-fructose corn syrup relative to the previous month's projections. Exports are projected to total 1.347 million MT, a 15,000-MT reduction from the previous month, due to fewer available supplies. Ending stocks for Mexico are also unchanged, based on an expected 22.0 percent stocks-to-human consumption ratio.

U.S. Domestic Outlook

Favorable Conditions Keep Production at Record Levels

Favorable weather conditions for sugarbeet and most sugarcane processors have continued through February, maintaining the strong outlook for the respective slicing and harvesting campaigns. Total U.S. sugar production in 2017/18 is projected to total 9.240 million short tons, raw value (STRV), up 10,000 STRV from the February report. If realized, this would remain a record level for domestic sugar production.

Table 1: U.S. sugar: supply and use, by fiscal year (Oct./Sept.), March 2018

| Items | 2015/16 | 2016/17 (estimate) | 2017/18 (forecast) | 2015/16 | 2016/17 (estimate) | 2017/18 (forecast) |
|---|-----------------------------|-----------------------|-----------------------|------------------------------|-----------------------|-----------------------|
| | 1,000 Short tons, raw value | | | 1,000 Metric tons, raw value | | |
| Beginning stocks | 1,815 | 2,054 | 1,876 | 1,647 | 1,863 | 1,702 |
| Total production | 8,989 | 8,969 | 9,240 | 8,155 | 8,137 | 8,382 |
| Beet sugar | 5,119 | 5,103 | 5,219 | 4,644 | 4,629 | 4,735 |
| Cane sugar | 3,870 | 3,866 | 4,021 | 3,511 | 3,507 | 3,647 |
| Florida | 2,173 | 2,055 | 1,992 | 1,971 | 1,864 | 1,807 |
| Louisiana | 1,428 | 1,628 | 1,859 | 1,296 | 1,477 | 1,686 |
| Texas | 116 | 140 | 170 | 106 | 127 | 154 |
| Hawaii | 152 | 43 | 0 | 138 | 39 | 0 |
| Total imports | 3,341 | 3,244 | 3,467 | 3,031 | 2,943 | 3,146 |
| Tariff-rate quota imports | 1,620 | 1,611 | 1,788 | 1,469 | 1,462 | 1,622 |
| Other program imports | 396 | 419 | 400 | 359 | 380 | 363 |
| Non-program imports | 1,325 | 1,213 | 1,279 | 1,202 | 1,101 | 1,161 |
| Mexico | 1,309 | 1,201 | 1,269 | 1,187 | 1,090 | 1,152 |
| Total supply | 14,145 | 14,267 | 14,583 | 12,832 | 12,943 | 13,230 |
| Total exports | 74 | 95 | 150 | 67 | 86 | 136 |
| Miscellaneous | -33 | 38 | 0 | -30 | 35 | 0 |
| Deliveries for domestic use | 12,051 | 12,258 | 12,480 | 10,932 | 11,121 | 11,322 |
| Transfer to sugar-containing products for exports under re-export program | 148 | 127 | 120 | 134 | 115 | 109 |
| Transfer to polyhydric alcohol, feed, other alcohol | 22 | 29 | 35 | 20 | 27 | 32 |
| Commodity Credit Corporation (CCC) sale for ethanol, other | 0 | 0 | 0 | 0 | 0 | 0 |
| Deliveries for domestic food and beverage use | 11,881 | 12,102 | 12,325 | 10,778 | 10,979 | 11,181 |
| Total use | 12,091 | 12,391 | 12,630 | 10,969 | 11,241 | 11,458 |
| Ending stocks | 2,054 | 1,876 | 1,953 | 1,863 | 1,702 | 1,772 |
| Private | 2,054 | 1,876 | 1,953 | 1,863 | 1,702 | 1,772 |
| Commodity Credit Corporation (CCC) | 0 | 0 | 0 | 0 | 0 | 0 |
| Stocks-to-use ratio | 16.99 | 15.14 | 15.46 | 16.99 | 15.14 | 15.46 |

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

Sugarbeet processors across the country have faced relatively favorable conditions since this year's crop has been harvested. Temperatures started off cold after the harvest and have mostly remained below freezing, allowing for good storage conditions. According to reports from processors, most of them have completed slicing sugarbeets from exposed piles, and the remaining production is to come predominantly from piles that are covered with temperature

control systems. These developments are positive for the shrink of this year's crop, as well as for maintaining the high sucrose extraction rates. Beet sugar production is unchanged from the previous month, totaling 5.219 million STRV for 2017/18.

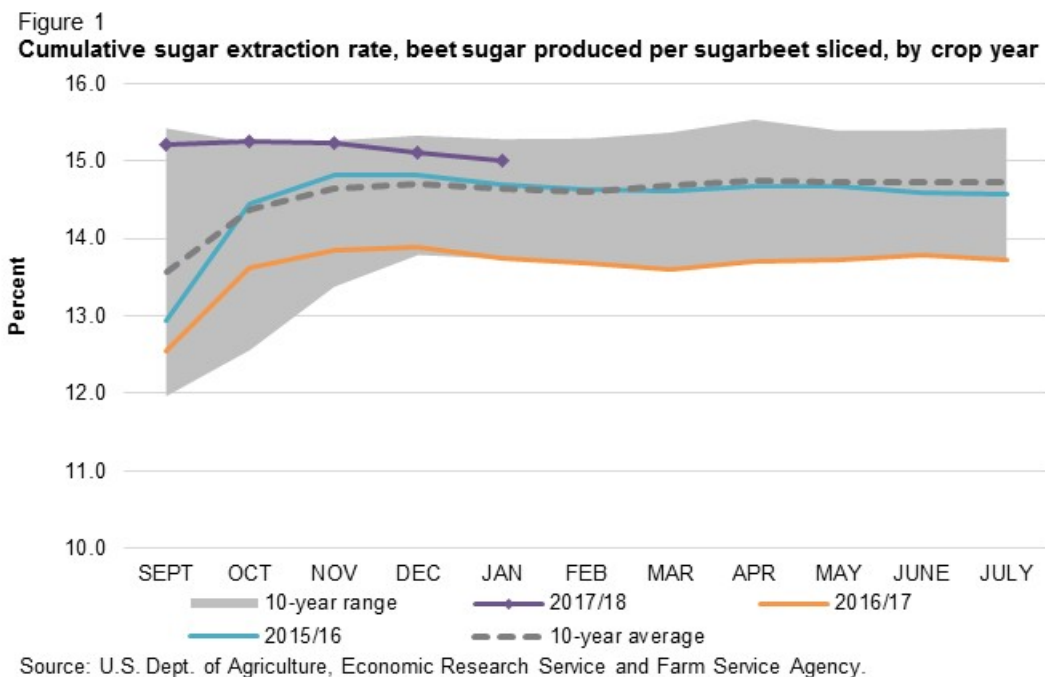


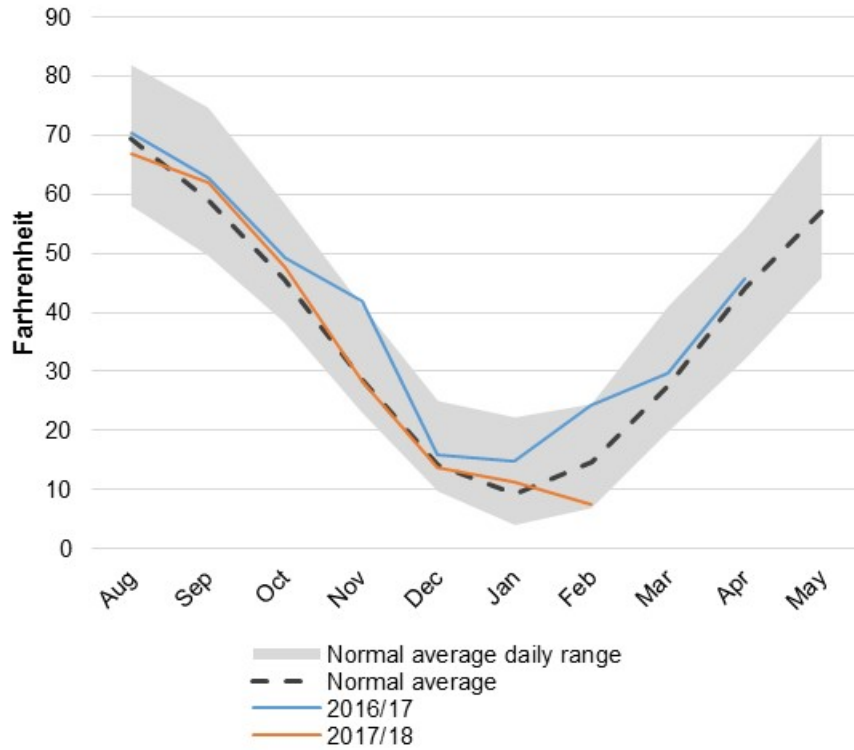
Table 2. Beet sugar production projection calculation, 2017/18

| | 2009/10 | 2010/11 | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2017/18 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|----------|---------|
| | | | | | | | | | February | March |
| Sugarbeet production (1,000 short tons) 1/ | 29,783 | 32,034 | 28,896 | 35,224 | 32,789 | 31,285 | 35,371 | 36,881 | 35,325 | 35,325 |
| Sugarbeet shrink 2/ | 5.7% | 5.9% | 5.9% | 4.8% | 6.8% | 5.4% | 6.5% | 8.3% | 6.4% | 6.4% |
| Sugarbeet sliced (1,000 short tons) | 28,097 | 30,137 | 27,184 | 33,532 | 30,545 | 29,595 | 33,066 | 33,834 | 33,076 | 33,076 |
| Sugar extraction rate from slice | 14.3% | 15.4% | 15.0% | 15.3% | 14.3% | 14.6% | 14.6% | 13.7% | 15.3% | 15.3% |
| Sugar from beets slice (1,000 STRV) | 4,023 | 4,631 | 4,086 | 5,142 | 4,325 | 4,325 | 4,820 | 4,643 | 5,045 | 5,045 |
| Sugar from molasses (1,000 STRV) 2/ | 325 | 357 | 401 | 327 | 324 | 341 | 380 | 352 | 345 | 345 |
| Crop year sugar production (1,000 STRV) 3/ | 4,348 | 4,987 | 4,487 | 5,469 | 4,648 | 4,667 | 5,201 | 4,995 | 5,390 | 5,390 |
| August-September sugar production (1,000 STRV) | 396 | 623 | 294 | 708 | 315 | 461 | 688 | 606 | 715 | 715 |
| August-September sugar production forecast (1,000 STRV) 4/ | 623 | 294 | 708 | 315 | 461 | 688 | 606 | 715 | 504 | 504 |
| Sugar from imported beets (1,000 STRV) 5/ | -- | -- | -- | -- | -- | -- | -- | -- | 40 | 40 |
| Fiscal year sugar production (1,000 STRV) | 4,575 | 4,659 | 4,900 | 5,076 | 4,794 | 4,893 | 5,119 | 5,103 | 5,219 | 5,219 |

Notes: 1/ National Agricultural Statistics Service, U.S. Dept. of Agriculture. 2/Projections based on processor forecasts published by U.S. Dept. of Agriculture, Farm Service Agency. 3/ August-July basis. 4/ 2017/18 based on 10-year historical average. 5/ Sugar from imported beets split out for projections only, included in total once full crop year slice is recorded. They are incorporated into total production in historical data.

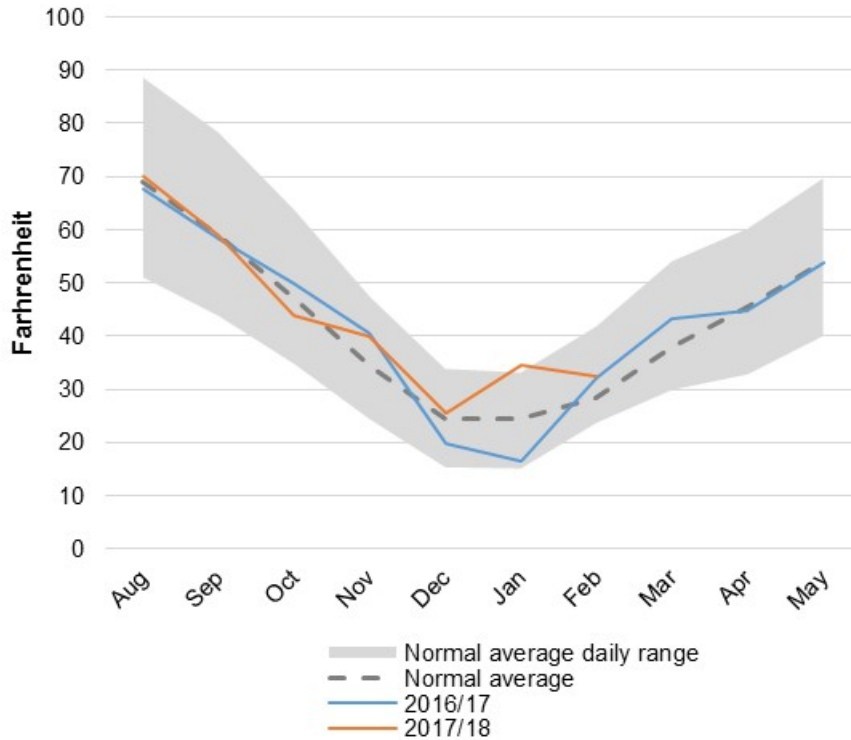
Source: U.S. Dept. of Agriculture, Economic Research Service and World Agricultural Outlook Board.

Figure 2
Fargo, ND temperatures, monthly averages, 2015/16-2016/17 and normal



Source: U.S. Department of Agriculture, Office of the Chief Economist.

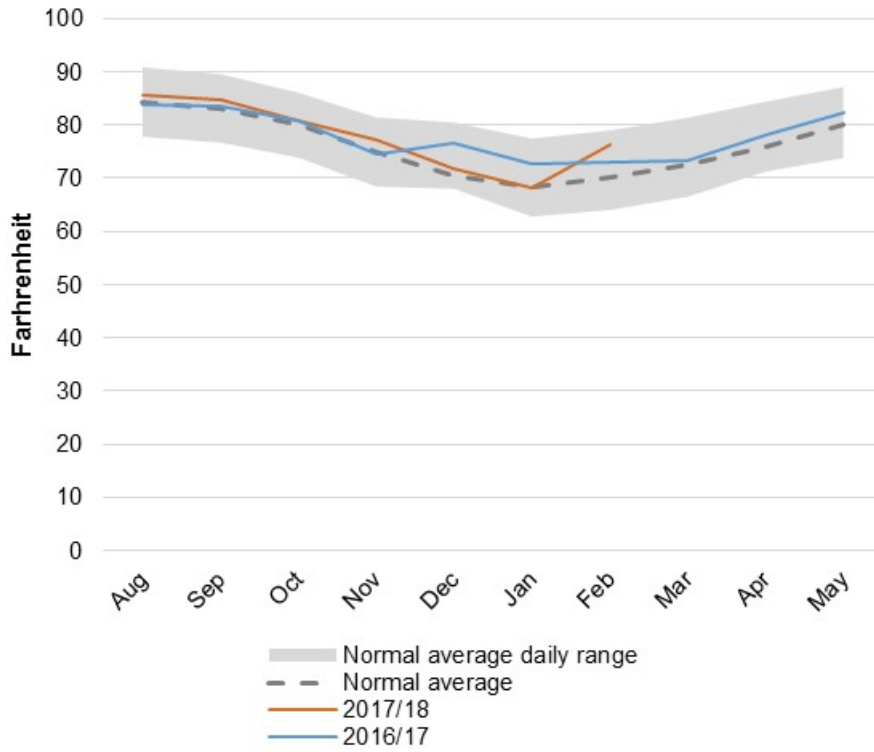
Figure 3
Pocatello, ID temperatures, monthly averages, 2015/16-2016/17 and normal



Source: U.S. Department of Agriculture, Office of the Chief Economist.

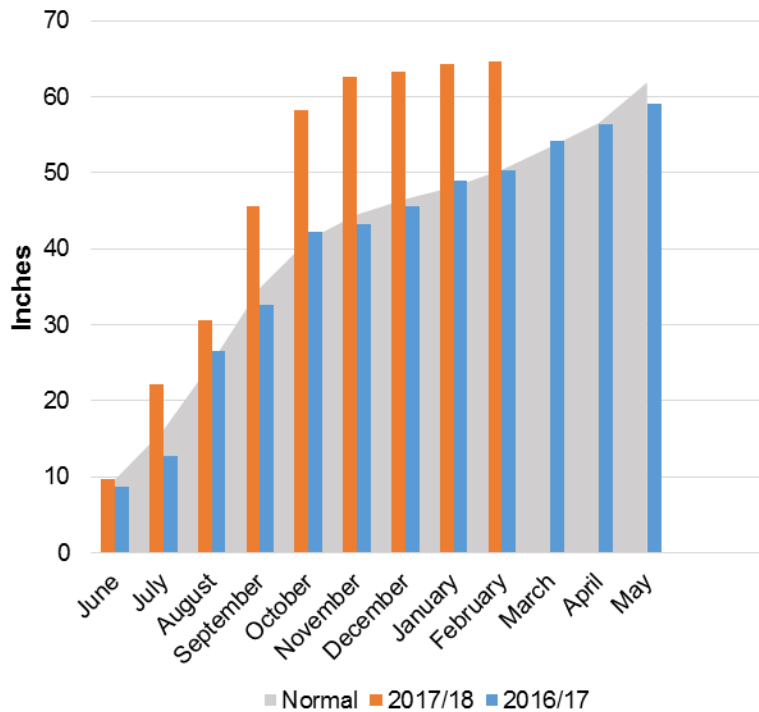
U.S. sugarcane growers have also seen strong crops through the harvest season. Florida sugarcane regions, which was affected by Hurricane Irma in September and a warm and wet start to the growing season, have seen some areas impacted by adverse weather. This has mostly affected the sugar recovery rates from the cane and, in some isolated areas, sugarcane yields where the crop was unable to recover. Good development prior to the bad weather and relatively dry and warm temperatures over the past few months have resulted in projected cane sugar production of 1.992 million STRV, unchanged from the previous month. This would not be as strong as the previous 2 years, but it would still be the third-largest crop-year production since 2004/05.

Figure 4
Miami, FL temperatures, monthly averages, 2016/17-2017/18 and normal



Source: U.S. Department of Agriculture, Office of the Chief Economist.

Figure 5
Miami, FL precipitation, cumulative, 2016/17 to 2017/18 and normal



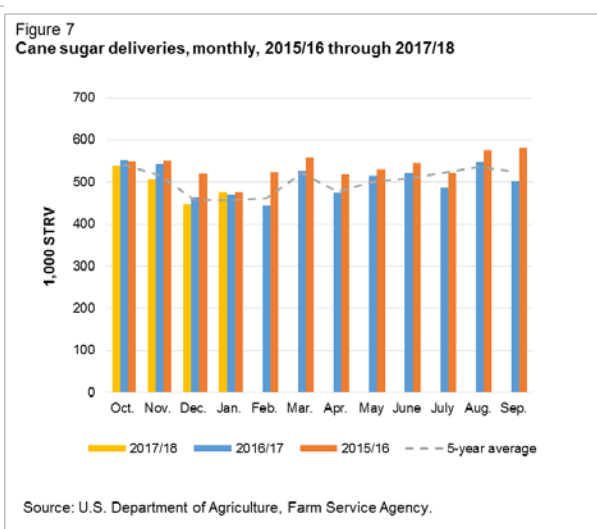
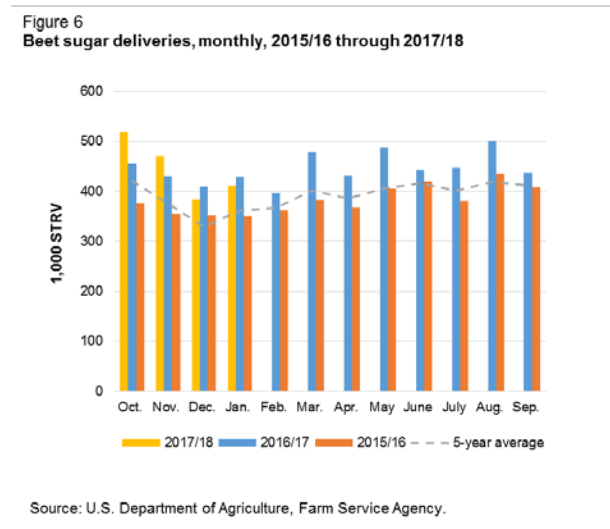
Source: U.S. Department of Agriculture, Office of the Chief Economist.

Louisiana cane sugar production is projected to be a record 1.859 million STRV, unchanged from the previous month. Increased harvested area, good yields, and favorable weather conditions that allowed the harvest season to continue several weeks longer than normal, into mid-January, all contributed to the higher production total. Cane sugar production in Texas is raised 10,000 STRV from the previous month, totaling 170,000 STRV, as growers in the region continue to recover from several down-years between 2013/14 and 2015/16.

Domestic Deliveries Unchanged, Exports Increased for 2017/18

Total domestic deliveries are projected to be 12.480 million STRV, including 12.325 million STRV for food and beverage consumption. Domestic deliveries through January are 3.5 percent higher than the same period last year. Deliveries from beet processors are 3.5 percent ahead of the previous year through January. Deliveries in the months of December and January were lower compared with 2016/17, which ultimately saw a significant record in beet sugar deliveries for the year; however, totals remain substantially higher than historical levels.

This indicates that the strong deliveries of the previous year are continuing thus far into 2017/18. Cane sugar deliveries are 3.0 percent lower through January compared with the previous year; however, cane sugar deliveries in January 2018 were larger year-over-year for the first time since October 2017. While January is historically one of the lighter months in terms of cane sugar deliveries, orders for sugar are often contracted on a calendar-year basis. The year-over-year increase for January deliveries could indicate that cane sugar deliveries will stabilize in 2017/18, following the steady growth of cane refiners' inventories since September 2017, partially due to the increase in the 2016/17 WTO raw sugar TRQ.



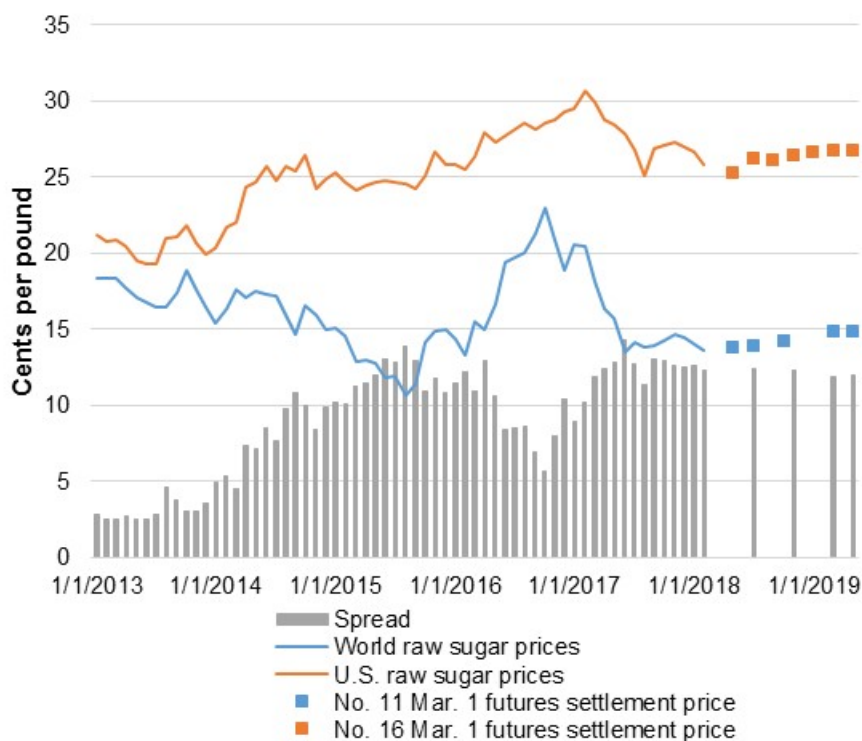
Projected exports for 2017/18 are raised 50,000 STRV to 150,000 STRV, due mainly to the pace thus far in the year. Through January, the Farm Service Agency's (FSA) *Sweetener Market Data* (SMD) has reported that 81,000 STRV of sugar has been exported by sugar processors. Much of this is exports destined for Mexico, which has had relatively high domestic prices since the spring of 2017. The increase in projected exports raises estimated total use to 12.630 million STRV, also a 50,000-STRV increase.

Strong Pace Increases Imports for the Re-export Program

Total imports are projected to be 3.467 million STRV, a 151,000-STRV increase from the February projection. Much of the increase is due to higher projected imports under the re-export program, which are now projected at 400,000 STRV, a 150,000-STRV increase from the previous month. Through February, the Foreign Agricultural Service (FAS) estimates that 161,000 STRV has been imported through the program. The increased projection also brings the total in line with historical levels of the program, rather than showing a sharp decline for 2017/18.

Historically, the re-export program relied upon exports to Mexico—and specifically to Mexican customers that participated in the IMMEX trade program—as a main factor in generating balances that allowed qualified refiners to import under the program. A February 2016 IMMEX regulatory change by the Government of Mexico disqualified U.S. sugar that came through the re-export program channel from receiving IMMEX’s tax benefits. The new regulation was initially expected to be detrimental to the U.S. re-export program, although participants have found new channels to maintain import volumes. The premium between the U.S. raw sugar price and the World raw sugar price on the futures market has remained fairly strong over the past several months; this likely further encourages using the program to maintain refinery utilization rates and find market opportunities for refined sugar exports or sugar-containing product exports.

Figure 8
U.S. and World raw sugar prices, monthly, January 2013 to December 2017



Source: U.S. Department of Agriculture, Economic Research Service.

Imports under quota programs remain unchanged from the previous month at 1.622 million STRV. Imports under the WTO raw sugar TRQ are projected to be 1.788 million STRV, which incorporates a 99,000-STRV shortfall for the 2017/18 TRQ allotment. The projection also includes imports entered under the 2016/17 TRQ, whose deadline was extended into early

2017/18 to accommodate the announcement to reallocate and increase the TRQ in the summer of 2017.

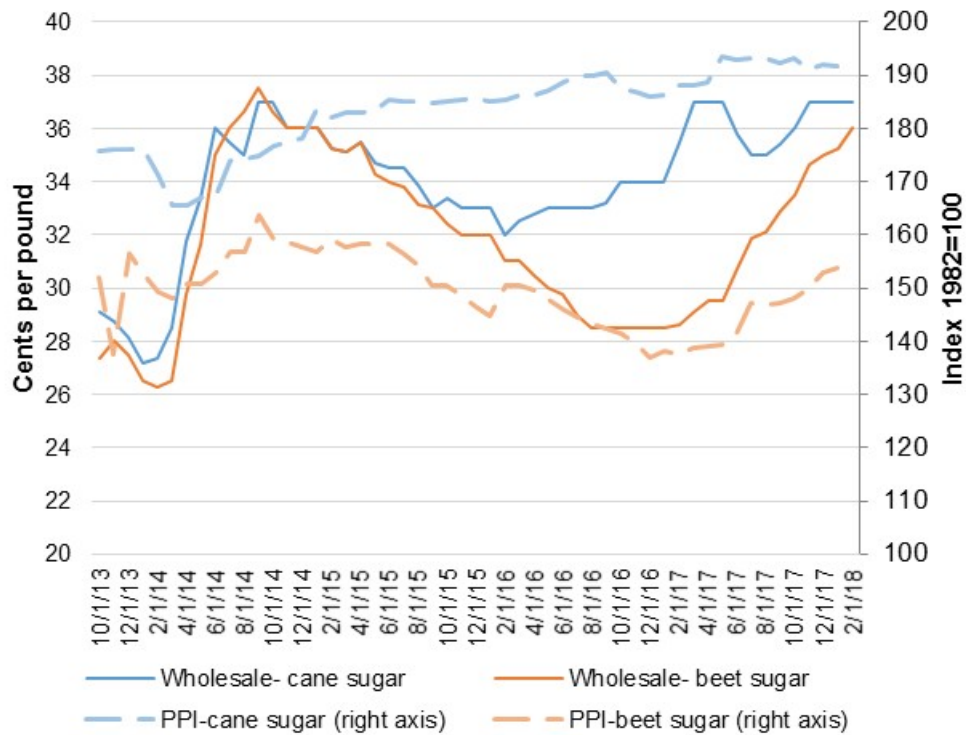
Imports from Mexico are projected to be 1.269 million STRV, an increase of about 1,000 STRV from the previous month. The increase is due to the recognition of sugar that entered under a 2016/17 Export Limit license in October but was recorded as entering in the 2017/18 fiscal year according to Census data. The 2017/18 Export Limit is expected to remain at 1.268 million STRV when the U.S. Department of Commerce (USDOC) announces an updated and Export Limit amount subsequent to the March WASDE release. Based on the terms of the suspension agreements signed by the USDOC and the Government of Mexico in December 2017 and amended in June 2017, the U.S. Needs based on the March WASDE is 1.021 million STRV. However, the Export Limit will remain unchanged, as it reflects the Export Limit established in September and December, which was 70 percent of the U.S. Needs calculated from the September WASDE.

Refined Sugar Prices Remain Above Previous Year's Levels

Ending stocks in 2017/18 is projected to be 1.953 million STRV, a 111,000-STRV increase from the February projection, as the increase in projected supplies eclipsed the projected increase in use. The resulting stocks-to-use is 15.5 percent, compared with 14.6 percent the previous month.

U.S. refined prices have remained above the previous year's levels thus far in 2017/18. The monthly average beet sugar refined spot price was 36.00 cents per pound in February; a 0.75 cent increase from January and 25.6 percent higher than the 28.63 cent per pound average recorded in February 2017. The February refined cane sugar average monthly spot price remained unchanged from the previous month at 37.00 cents. The spread between refined cane and beet sugar on the spot market is now at 1 cent per pound, after reaching as high as 7.9 cents per pound in March of 2017. Differences in the refined sugar costs as related by the Producer Price Index (PPI)—which reflects the actual costs paid by buyers—also shows a significant narrowing between the two products. The indices reached their highest differences in May 2017 and have since steadily narrowed to levels comparable to 2016.

Figure 9
Refined sugar prices, wholesale and Producer Price Indices, monthly



Source: U.S. Department of Agriculture, Economic Research Service.

Mexico Outlook

Sugar Production Lowered, Imports Raised for 2017/18

Total sugar supplies in Mexico are projected to be 7.222 million metric tons (MT), actual value, a 15,000-MT reduction from the February forecast. The change is the net between lower production expectations and higher projected imports.

Table 3: Mexico sugar supply and use, 2015/16 - 2016/17 and projected 2017/18, March 2018

| Items | 2015/16 | 2016/17 (estimate) | 2017/18 (forecast) |
|---|----------------------------------|--------------------|--------------------|
| | 1,000 metric tons, actual weight | | |
| Beginning stocks | 811 | 1,037 | 1,002 |
| Production | 6,117 | 5,957 | 6,050 |
| Imports | 83 | 93 | 170 |
| Imports for consumption | 17 | 48 | 120 |
| Imports for sugar-containing product exports, IMMEX 1/, other | 66 | 45 | 50 |
| Total supply | 7,011 | 7,087 | 7,222 |
| Disappearance | | | |
| Human consumption | 4,387 | 4,515 | 4,496 |
| For sugar-containing product exports (IMMEX) | 390 | 397 | 390 |
| Other deliveries and end-of-year statistical adjustment | -10 | -61 | 0 |
| Total | 4,767 | 4,851 | 4,886 |
| Exports | 1,207 | 1,234 | 1,347 |
| Exports to the United States & Puerto Rico | 1,120 | 1,028 | 1,086 |
| Exports to other countries | 86 | 205 | 261 |
| Total use | 5,974 | 6,085 | 6,233 |
| Ending stocks | 1,037 | 1,002 | 989 |
| | 1,000 metric tons, raw value | | |
| Beginning stocks | 859 | 1,099 | 1,062 |
| Production | 6,484 | 6,315 | 6,413 |
| Imports | 88 | 98 | 180 |
| Imports for consumption | 18 | 51 | 127 |
| Imports for sugar-containing product exports (IMMEX) | 70 | 47 | 53 |
| Total supply | 7,431 | 7,512 | 7,656 |
| Disappearance | | | |
| Human consumption | 4,650 | 4,786 | 4,766 |
| For sugar-containing product exports (IMMEX) | 413 | 420 | 413 |
| Other deliveries and end-of-year statistical adjustment | -10 | -64 | 0 |
| Total | 5,053 | 5,142 | 5,179 |
| Exports | 1,279 | 1,308 | 1,428 |
| Exports to the United States & Puerto Rico | 1,187 | 1,090 | 1,152 |
| Exports to other countries | 92 | 218 | 277 |
| Total use | 6,332 | 6,450 | 6,607 |
| Ending stocks | 1,099 | 1,062 | 1,048 |
| Stocks-to-human consumption (percent) | 23.6 | 22.2 | 22.0 |
| Stocks-to-use (percent) | 17.4 | 16.5 | 15.9 |
| High fructose corn syrup (HFCS) consumption (dry weight) | 1,482 | 1,522 | 1,608 |

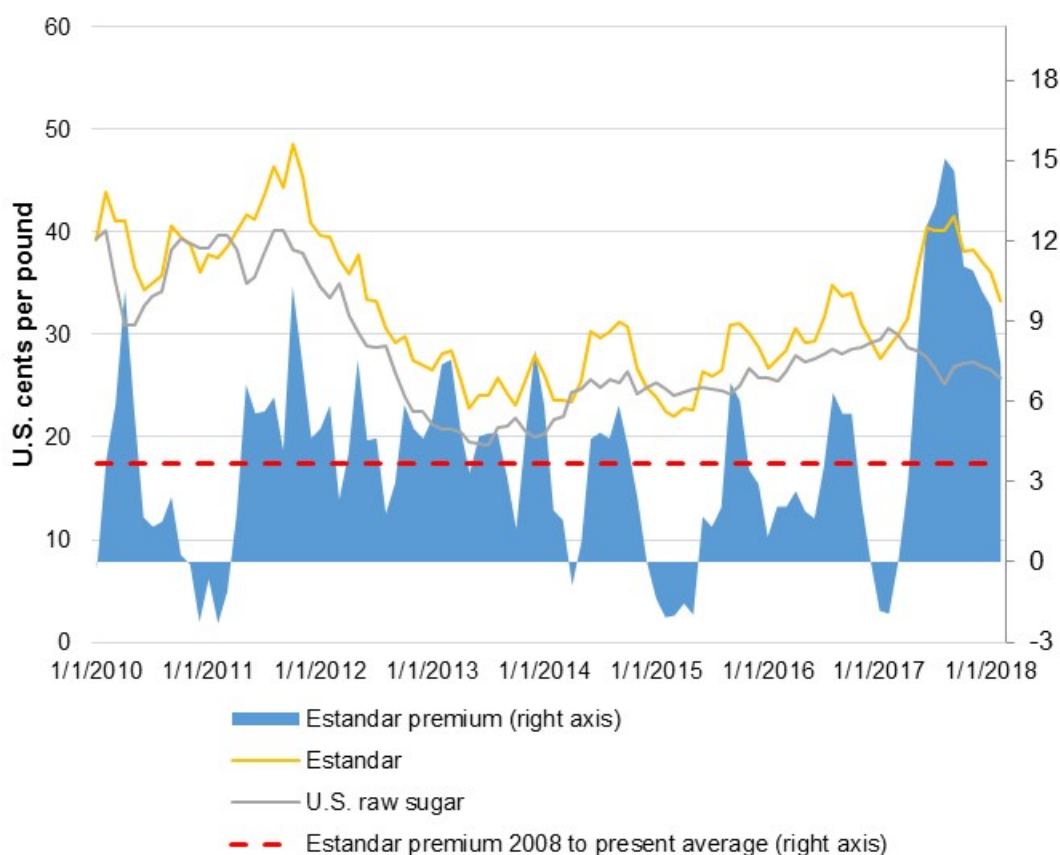
1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

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

Imports are projected to be 170,000 MT, a 35,000-MT increase from the previous report. The increase is in line with changes made by forecasts from Mexico's *Comité Nacional para el Desarrollo Sustentable de la Caña de Azúcar* (Conadesuca). The increase is accounted for by

imports for human consumption. Imports entering under the IMMEX program are unchanged, projected to total 50,000 MT. Domestic prices in Mexico remain high, particularly relative to U.S. sugar markets. As a result, U.S. sugar has been exported to Mexico and is expected to stay high, although the pace may slow as the price differentials have narrowed. The February average wholesale price for estandar sugar in Mexico City was 7.35 cents higher than the average U.S. raw sugar price. This spread reached 15 cents per pound in August 2017 and has since fallen substantially, but it remains well above the long-run average.

Figure 10
Mexico City estandar and U.S. raw sugar prices, monthly, January 2010 to February 2018

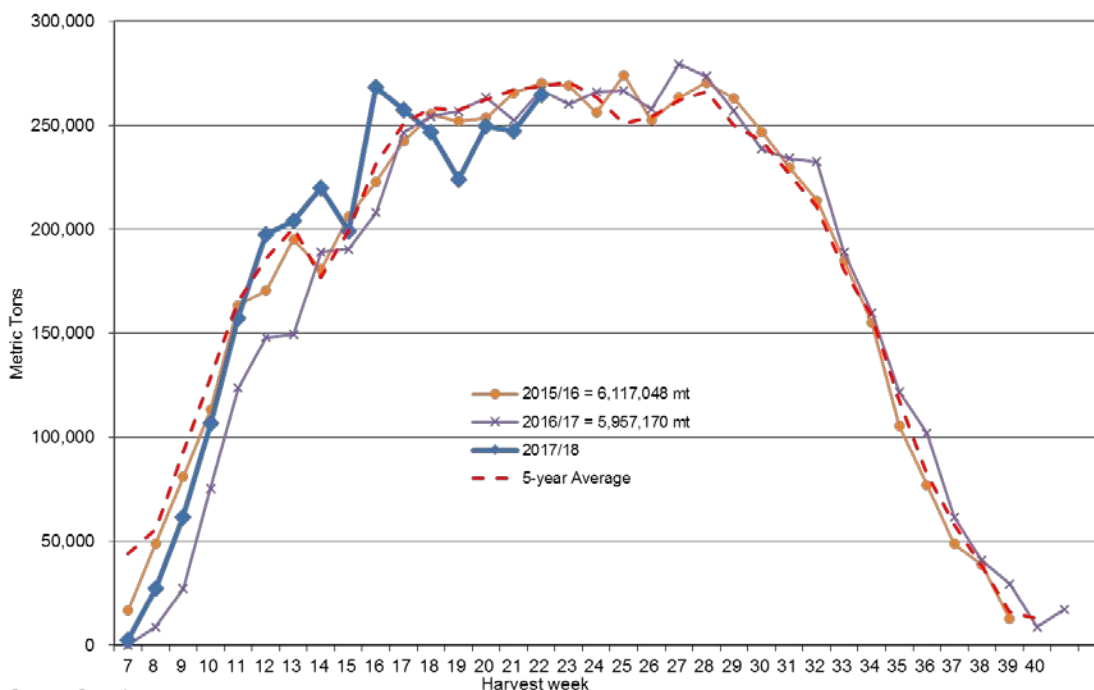


Source: U.S. Department of Agriculture, Economic Research Service.

Mexico production is projected to be 6.050 million MT, a 50,000-MT reduction from the previous month. The Mexico sugarcane harvest has continued to progress without major interruption. Through March 3, 2018, mills have produced 3.208 million MT— 0.7 percent larger than the same period the previous year. Harvested area totaled 388,000 hectares, 1.9 percent lower than the pace set in 2016/17. Yields and recovery rates have been larger than the previous

year, however, resulting in higher sugar production. Lower expected harvested area reduces the outlook for production during the harvest campaign.

Figure 11
Mexico sugar production, by week of harvest, 2015/16-2017/18



Source: Conadesuca.

Production of low-polarity sugar, with specifications to fulfill the “Other Sugar” portion of the Export Limit, totaled 409,000 MT through March 3. Production of this specification remains concentrated in 13 of the 50 mills that have been in production, according to the latest Conadesuca report. The production would account for more than half of the 2017/18 Export Limit for Other Sugar. With the height of the harvest season likely to continue for an additional 8 to 10 weeks of reporting, production of low-polarity sugar appears to be on track to meet the Export Limit allocation.

Domestic Deliveries Unchanged, Exports Lowered

Domestic deliveries in Mexico in 2017/18 are projected to be 4.886 million MT, unchanged from the previous month’s projection. Deliveries for domestic consumption are projected to be 4.496 million MT and deliveries to the IMMEX program are projected at 390,000 MT—both also unchanged from the previous month. Through January, Conadesuca reports 1.429 million MT of domestic sugar deliveries for human consumption, a 5.5-percent decrease from the same period the previous year. Likewise, deliveries of high fructose corn syrup (HFCS) are 9.1-

percent higher, totaling 513,000 MT. While the monthly pace of HFCS deliveries in January fell from the strong pace set in the October-to-December quarter, HFCS remains well ahead of the past several years. This is likely due to the combination of high sugar prices and slow sugar deliveries. These are likely the same drivers behind the increased sugar imports projected for 2017/18.

Mexico exports are projected to total 1.347 million MT for 2017/18, a 15,000-MT reduction from the February projection. Exports to the United States are projected to total 1.086 million MT, a slight 1,000-MT increase from the previous month. The projection is in line with the 2017/18 Export Limit, as well as the recognition of entries in October 2017 that came under a 2016/17 license but were accounted for in the 2017/18 fiscal year by the Census Department. Exports to other countries are reduced 16,000 MT, totaling 261,000 MT, due to the reduction in projected supplies.

Ending stocks for 2017/18 are projected to be 989,000 MT, unchanged from the previous month. This represents a 22.0 stocks-to-consumption ratio. Conadesuca's latest projections, released subsequent to the March WASDE release, show a slightly tighter market, with ending stocks totaling 973,000 MT.

Table 4: Mexico sugar supply and use projections, 2017/18, thousand metric tons, actual value

| | USDA 1/ | Conadesuca 2/ |
|---------------------------------------|---------|---------------|
| Beginning stocks | 1,002 | 1,002 |
| Production | 6,050 | 6,055 |
| Imports | 170 | 120 |
| Imports for consumption | 120 | 120 |
| Imports for IMMEX 3/ | 50 | -- |
| | | |
| Total Supply | 7,222 | 7,177 |
| | | |
| Domestic deliveries | 4,886 | 4,792 |
| Domestic consumption | 4,496 | 4,462 |
| IMMEX deliveries 3/ | 390 | 330 |
| Exports | 1,347 | 1,412 |
| Exports to the United States | 1,086 | 1,085 |
| Exports to the rest of world | 261 | 327 |
| | | |
| Total use | 6,233 | 6,204 |
| | | |
| Ending Stocks | 989 | 973 |
| | | |
| Stocks-to-consumption ratio (percent) | 22.0 | 21.8 |
| Stocks-to-use ratio (percent) | 15.9 | 15.7 |
| HFCS Deliveries | 1,608 | 1,570 |

1/ Released March 8, 2018.

2/ Released March 9, 2018.

3/ Differences between USDA and Conadesuca values due to differences in accounting for IMMEX sugar moving through the sweetener market. Conadesuca does not count sugar imported under the IMMEX program as imports or deliveries if the sugar is re-exported in sugar-containing products.

Source: U.S. Dept. of Agriculture; Conadesuca.

Contacts & Additional Information

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Data

Tables from the *Sugar and Sweeteners Yearbook* are available in the Sugar and Sweeteners Topics at <http://www.ers.usda.gov/topics/sugar/>. They contain the latest data and historical information on the production, use, prices, imports, and exports of sugar and sweeteners.

Related Websites

Sugar and Sweeteners Outlook <http://www.ers.usda.gov/Publications/SSS/>
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