



Sugar and Sweeteners Outlook

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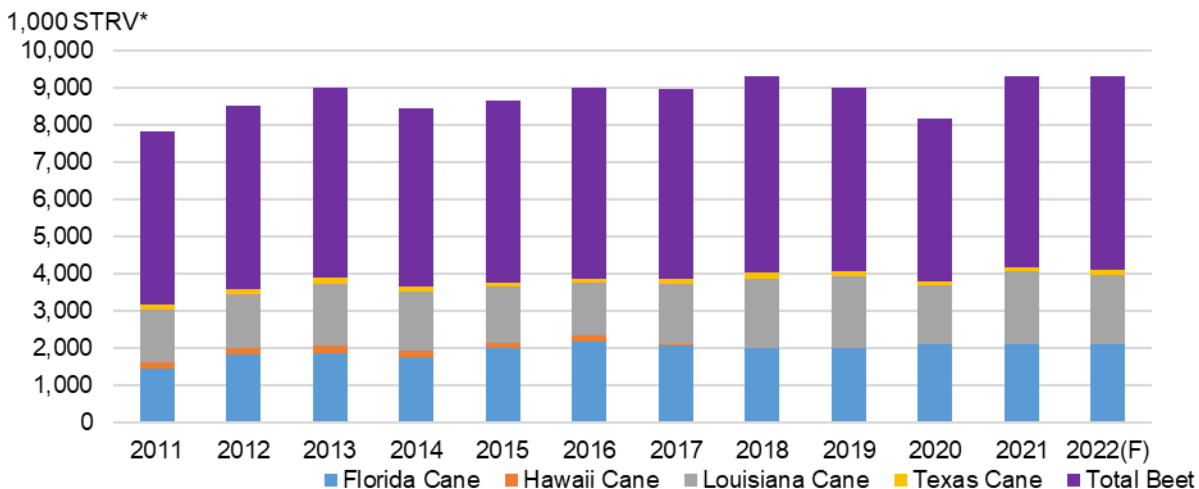
Andrew Sowell, coordinator

Ron Lord, contributor

U.S. Sugar Production Projected Larger, but Supplies Tighter with Smaller Imports

U.S. production of sugar is expected to be record-high in 2021/22 (figure 1) with larger beet sugar output more than offsetting smaller cane sugar production. Beginning stocks are projected larger, but total supply is still anticipated to be smaller with decreased imports. Deliveries are projected unchanged from the current year and ending stocks are forecast lower. For 2020/21, a reduction to Florida cane sugar production more than offsets an increase to beet sugar production. Imports are projected marginally higher, deliveries are unchanged this month, and stocks are projected lower. For Mexico, both production and deliveries are forecast smaller in 2021/22 and revised lower in 2020/21.

Figure 1
U.S. sugar production projected at record in fiscal year 2022



*Short tons, raw value

Source: USDA, Farm Service Agency; USDA, World Agricultural Outlook Board.

United States Outlook

Smaller Imports More Than Offset Larger Output and Stocks

In USDA's May *World Agricultural Supply and Demand Estimates (WASDE)*, U.S. supplies of sugar for 2021/22 total 13.767 million short tons, raw value (STRV), down 303,000 STRV from the revised 2020/21 figure (table 1). Imports are lowered 502,000 STRV to 2.652 million STRV, driven by smaller projections for all categories. Production is projected up slightly from the revised 2020/21 figure, while beginning stocks are up substantially year-on-year. Deliveries are projected unchanged from the previous year and stocks are projected lower. For 2020/21, U.S. supplies of sugar total 14.070 million STRV, down 43,000 tons from last month. Total production is lowered 45,000 STRV to 9.299 million STRV as a reduction to Florida cane sugar production more than outweighs a small increase to total beet sugar output. Total imports are raised marginally. Ending stocks are reduced by 43,000 STRV, resulting in a lower stocks-to-use ratio.

Table 1: U.S. sugar: supply and use by fiscal year (Oct./Sept.), May 2021

Items	2019/20	2020/21 (forecast) April	2020/21 (forecast) May	2020/21 Monthly Change	2021/22 (forecast) May	2021/22 Yearly Change
	1,000 Short tons, raw value					
Beginning stocks	1,783	1,618	1,618		1,805	188
Total production	8,149	9,344	9,299	-45	9,310	11
Beet sugar	4,351	5,093	5,118	25	5,225	107
Cane sugar	3,798	4,251	4,181	-70	4,085	-96
Florida	2,106	2,170	2,100	-70	2,100	0
Louisiana	1,566	1,949	1,949	0	1,850	-99
Texas	126	132	132	0	135	3
Hawaii	0	0	0	0	0	0
Total imports	4,235	3,152	3,154	2	2,652	-502
Tariff-rate quota imports	2,152	1,721	1,673	-48	1,387	-286
Other program imports	432	300	300	0	250	-50
Non-program imports	1,651	1,131	1,181	50	1,015	-166
Mexico	1,376	931	981	50	965	-16
High-duty	275	200	200	0	50	-150
Total supply	14,166	14,113	14,070	-43	13,767	-303
Total exports	61	35	35	0	35	0
Miscellaneous	74	0	0	0	0	0
Deliveries for domestic use	12,414	12,230	12,230	0	12,230	0
Transfer to sugar-containing products for exports under re-export program	78	80	80	0	80	0
Transfer to polyhydric alcohol, feed, other alcohol	20	25	25	0	25	0
Commodity Credit Corporation (CCC) sale for ethanol, other	0	0	0	0	0	0
Deliveries for domestic food and beverage use	12,316	12,125	12,125	0	12,125	0
Total use	12,549	12,265	12,265	0	12,265	0
Ending stocks	1,618	1,848	1,805	-43	1,502	-303
Private	1,618	1,848	1,805	-43	1,502	-303
Commodity Credit Corporation (CCC)	0	0	0	0	0	0
Stocks-to-use ratio	12.89	15.07	14.72	-0.35	12.25	-2.47

Source: USDA, Economic Research Service, *Sugar and Sweeteners Outlook*.

Cane Sugar Production Forecast Lower

Total cane sugar production for 2021/22 is projected at 4.085 million STRV, down 96,000 STRV from the revised 2020/21 figure. Production for Florida is forecast at 2.1 million STRV, equal to the revised 2020/21 estimate and up 2 percent from the recent 5-year average. Output in the coming season may be impacted by delays in finishing this year's crushing campaign if cane stands have less time to regrow for next year's harvest. Production for Louisiana is projected at 1.85 million STRV, down 99,000 STRV year-to-year, but still up 4 percent from the recent 5-year average. Over the past decade, sugarcane area and yields have trended upwards in this State. USDA's National Agricultural Statistics Service (NASS) reports that Louisiana sugarcane conditions are 64 percent good/excellent, 30 percent fair, and 6 percent poor/very poor as of May 9, 2021. These ratings are roughly in-line with last year and the recent 5-year average. Texas is projected slightly higher at 135,000 STRV, matching the recent 3-year average with the assumption of normal weather conditions during the rest of the growing season.

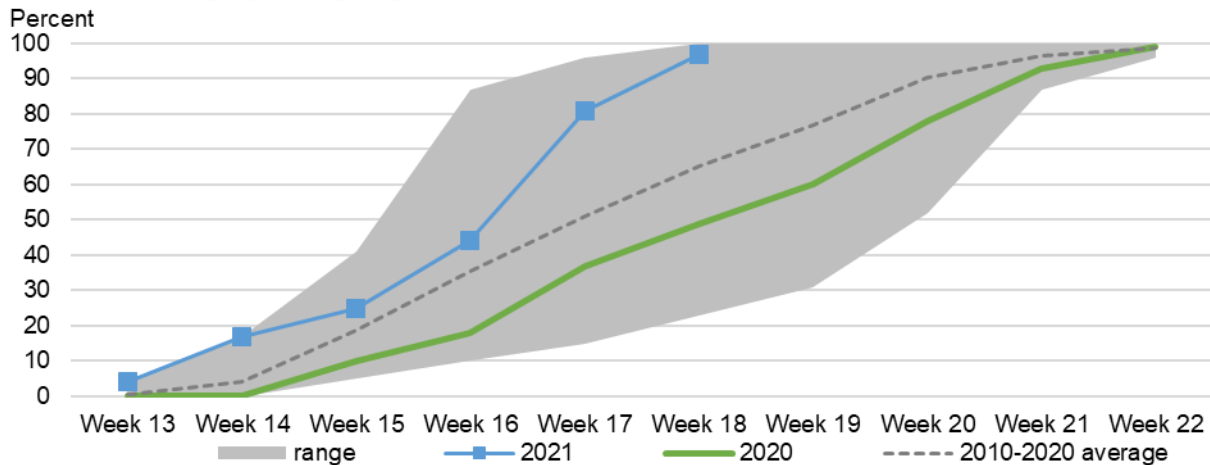
Cane sugar production for 2020/21 is lowered by 70,000 STRV to 4.181 million STRV, entirely driven by reduced output in Florida. Output in that State is adjusted downward to 2.1 million STRV based on revised processor estimates published by USDA's Farm Service Agency (FSA) in its *Sweetener Market Data (SMD)* publication. Mills are expected to take longer than usual to finish processing this year's crop, partly due to harvest delays. Production for Louisiana and Texas is unchanged as mills have completed processing for the season.

Beet Sugar Production Expected Stronger

U.S. beet sugar production in 2021/22 is projected up 107,000 STRV from the revised 2020/21 figure to 5.225 with a larger sugarbeet crop expected. The sugarbeet crop is forecast at 35.14 million short tons based on an area harvested estimate of 1.144 million acres. The area harvested estimate is derived from the NASS area planted estimate of 1.169 million acres and a typical ratio of harvested/planted acres. Sugarbeet yield is projected at 30.71 short tons/acre based on analysis of historical regional trends and takes into consideration the fast pace of planting progress through early May. This yield forecast nearly matches the recent 5-year average. The beet sugar production forecast also assumes normal levels of beet pile shrink and extraction rate (table 2).

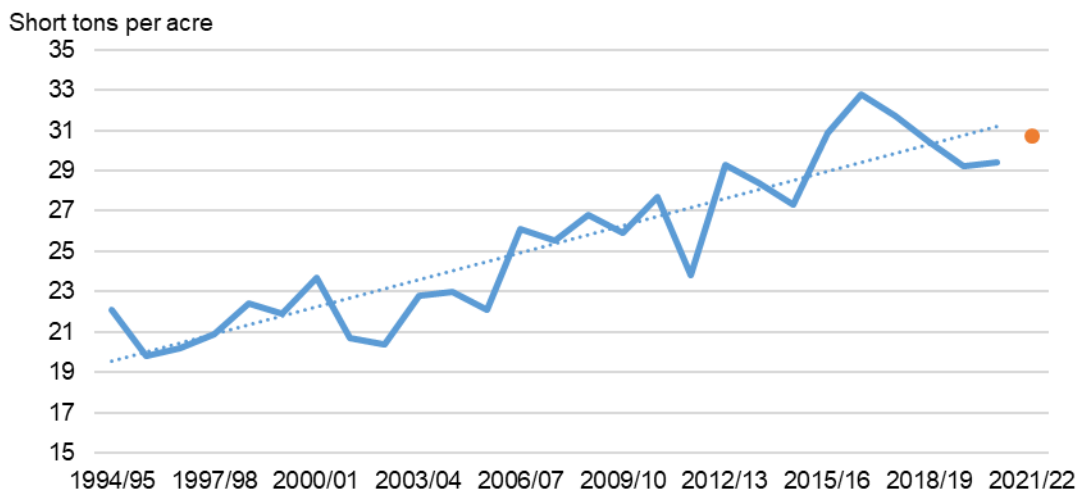
Planting sugarbeets in a timely manner is positively correlated with yields as it allows for better establishment of the plants prior to the key growing and development phases that occur during the warmer summer months. As of May 9 (week 18), NASS reports that sugarbeets are 97 percent seeded in the 4 largest producing States (Idaho, Michigan, Minnesota, and North Dakota), well ahead of both last year and the recent 10-year average (figure 2). Furthermore, a simple trend analysis of the recent history of sugarbeet yields suggests yields for 2021/22 slightly higher at 31.67 short tons/acre (figure 3).

Figure 2
National beet sugar planting progress, weekly, 2010-2021



Source: USDA, Economic Research Service; USDA, Farm Service Agency.

Figure 3
National sugarbeet yields, 1994/95-2021/22



Note: Orange dot represents the current forecast for 2021/22.

Source: USDA, National Agricultural Statistics Service; USDA, World Agricultural Outlook Board.

Also indicated in table 2, beet sugar production for 2020/21 has been revised higher based on a higher anticipated extraction rate. The expected extraction rate has been raised from 15.275

percent to 15.345 percent to match the cumulative extraction rate for the marketing year to-date (figure 4). Recovery rates in all regions have been above average. Overall, the cumulative extraction rate to-date is toward the upper end of the range observed in the previous 10 years.

Table 2: Beet sugar production projection calculation, 2019/20 and 2020/21

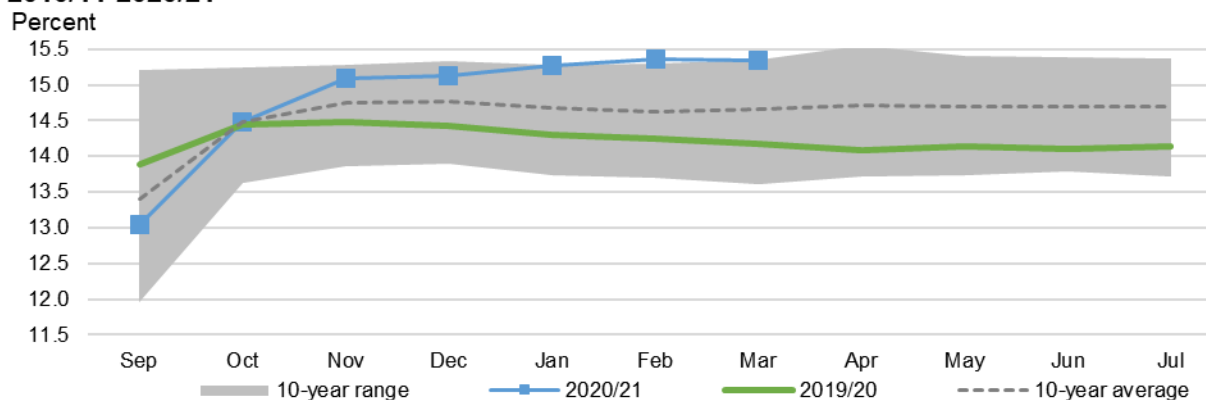
	2016/17	2017/18	2018/19	2019/20	2020/21	2020/21	2021/22
					April	May	May
Sugarbeet production (1,000 short tons) 1/	36,881	35,325	33,282	28,600	33,618	33,618	35,140
Sugarbeet shrink (percent)	8.26	7.31	5.17	5.34	6.58	6.58	6.58
Sugarbeet sliced (1,000 short tons)	33,834	32,742	31,561	27,072	31,405	31,405	32,826
Sugar extraction rate from slice (percent)	13.72	15.18	14.77	14.14	15.275	15.345	14.697
Sugar from beets slice (1,000 STRV) 2/	4,643	4,970	4,660	3,828	4,797	4,819	4,825
Sugar from molasses (1,000 STRV) 2/	352	368	352	341	360	360	360
Crop-year sugar production (1,000 STRV) 2/	4,995	5,338	5,012	4,169	5,157	5,179	5,185
August-September sugar production (1,000 STRV)	606	715	655	582	765	765	665
August-September sugar production of subsequent crop (1,000 STRV)	715	655	582	765	665	665	665
Sugar from imported beets (1,000 STRV) 3/	--	--	--	--	36	40	40
Fiscal year sugar production (1,000 STRV)	5,103	5,279	4,939	4,351	5,093	5,119	5,225

1/ USDA, National Agricultural Statistics Service for historical data. 2/ August-July basis. 3/ Sugar from imported beets split out for projections only, included in total once full crop-year slice is recorded. Sugar from imported beets is incorporated into total production in historical data.

Note: STRV = short tons, raw value.

Source: USDA, Economic Research Service; USDA, World Agricultural Outlook Board; USDA, Farm Service Agency.

Figure 4
Cumulative sugar extraction rate, beet sugar produced per sugarbeet sliced, by crop year, 2010/11-2020/21



Source: USDA, Economic Research Service and USDA, Farm Service Agency.

Deliveries Unchanged

Deliveries for 2021/22 are projected even with the current year at 12.125 million STRV. Deliveries in the past 5 years have largely flattened out after several years of more robust growth (figure 5). Significant uncertainty remains in the outlook for deliveries, based on the ongoing recovery from the COVID-19 pandemic. With market dynamics drastically different in 2020, the quarterly pace of deliveries was atypical in that the first quarter was significantly larger

than second quarter (figure 6). In 2021, deliveries in the first quarter of the year are down 6 percent from the first quarter of last year, but on par with recent years.

Figure 5
Total U.S. sugar deliveries, fiscal and calendar year, 2008 to 2021

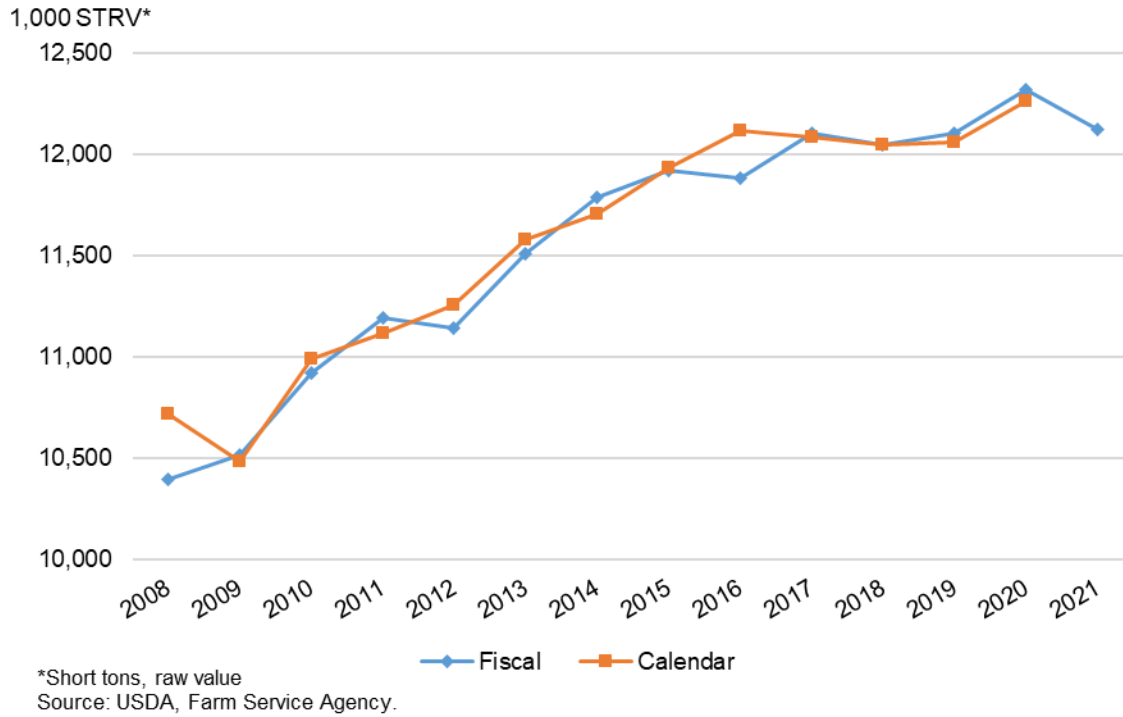
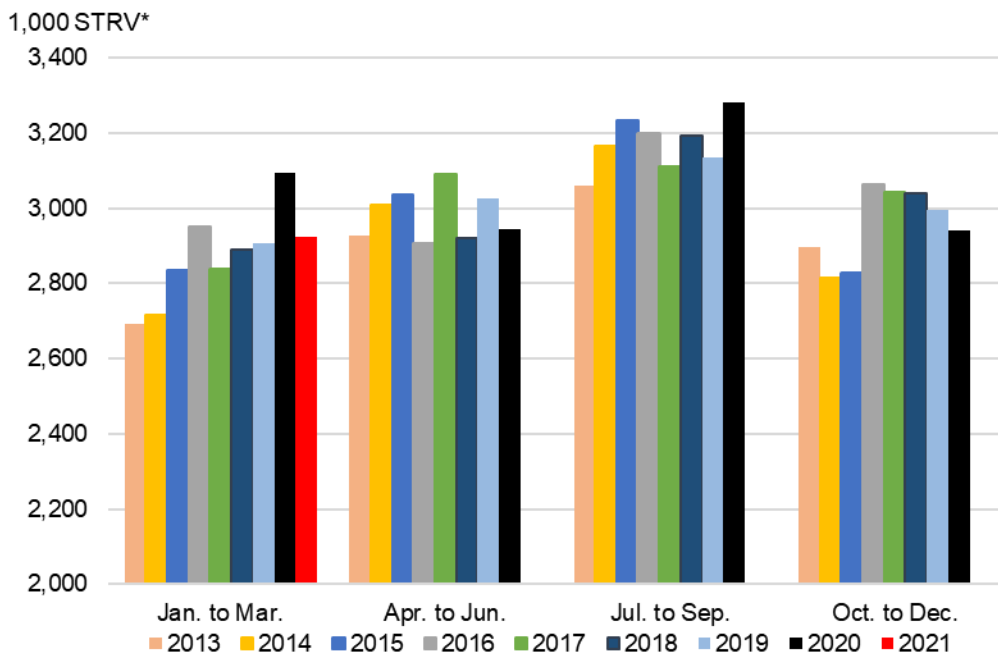


Figure 6
Total U.S. sugar deliveries, quarterly, calendar years 2013-21



*Short tons, raw value

Source: USDA, Farm Service Agency.

Total deliveries for the 2020/21 marketing year are unchanged from the previous month at 12.125 million STRV, but down 1.5 percent from the final fiscal year deliveries for 2019/20. Total deliveries for food and beverage use during the period October-March are down 3.8 percent from the same time last year (table 3). Deliveries from reporting companies are down 2.3 percent with the cane sector accounting for most of the reduction. Non-reporter (direct consumption) imports are down 22.4 percent from that same time last year.

Table 3: Food and beverage deliveries, 2015/16 to 2020/21, October-March

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Annual change
	1,000 short tons, raw value						Percent
Beet sugar processors	2,179	2,600	2,645	2,455	2,382	2,424	1.8
Cane sugar refiners	3,174	2,998	2,946	3,105	3,268	3,096	-5.3
Total reporters	5,354	5,598	5,591	5,560	5,650	5,520	-2.3
Non-reporter, direct consumption	425	302	343	384	441	342	-22.4
Total deliveries	5,779	5,900	5,934	5,944	6,091	5,862	-3.8
Final fiscal year deliveries	11,881	12,102	12,048	12,106	12,316	12,125	-1.5

Source: USDA, Farm Service Agency; USDA, World Agricultural Outlook Board.

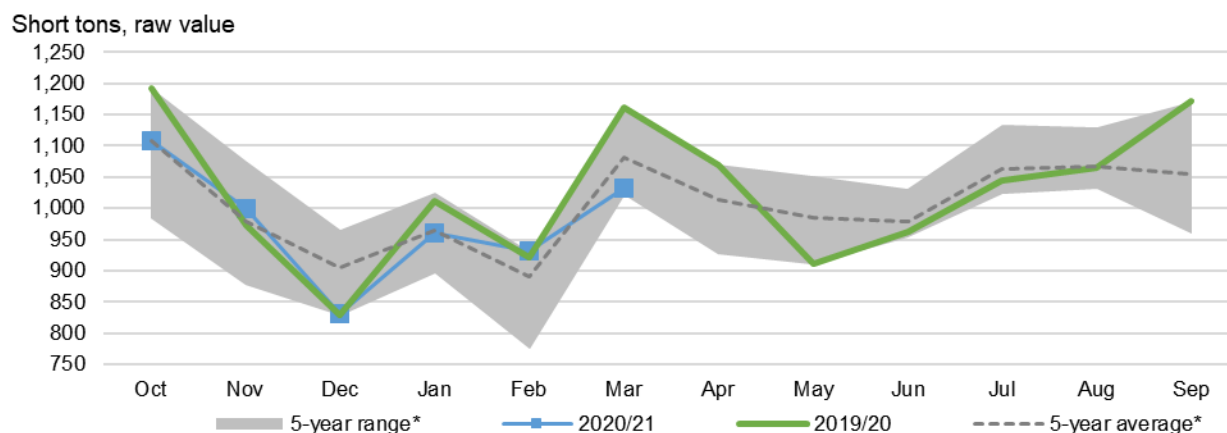
At 5.862 million STRV, October-March deliveries represent 48.3 percent of the projection for fiscal year 2020/21 deliveries, as indicated in table 4. This compares with last year when those 6 months accounted for 49.5 percent of the total. Over the previous 10 years, October through March deliveries have accounted for between 47.4 and 49.5 percent of the fiscal year total, with a weighted average of 48.4 percent. During the month of March, deliveries were up from February, but were weaker than the recent 10-year average for the month of March (figure 7).

Table 4: Pace of U.S. deliveries, October-March

	1,000 short tons, raw value		Percent of total
	Oct-Mar	Fiscal year (FY)	
FY11	5,383	11,193	48.1
FY12	5,345	11,141	48.0
FY13	5,526	11,511	48.0
FY14	5,612	11,786	47.6
FY15	5,652	11,921	47.4
FY16	5,779	11,881	48.6
FY17	5,900	12,102	48.8
FY18	5,934	12,048	49.3
FY19	5,944	12,106	49.1
FY20	6,091	12,316	49.5
FY21 (forecast)	5,862	12,125	48.3
10-year average	5,717	11,800	48.4

Source: USDA, Farm Service Agency, *Sweetener Market Data*; USDA, Economic Research Service.

Figure 7
Total U.S. sugar deliveries, monthly, 2015/16-2020/21

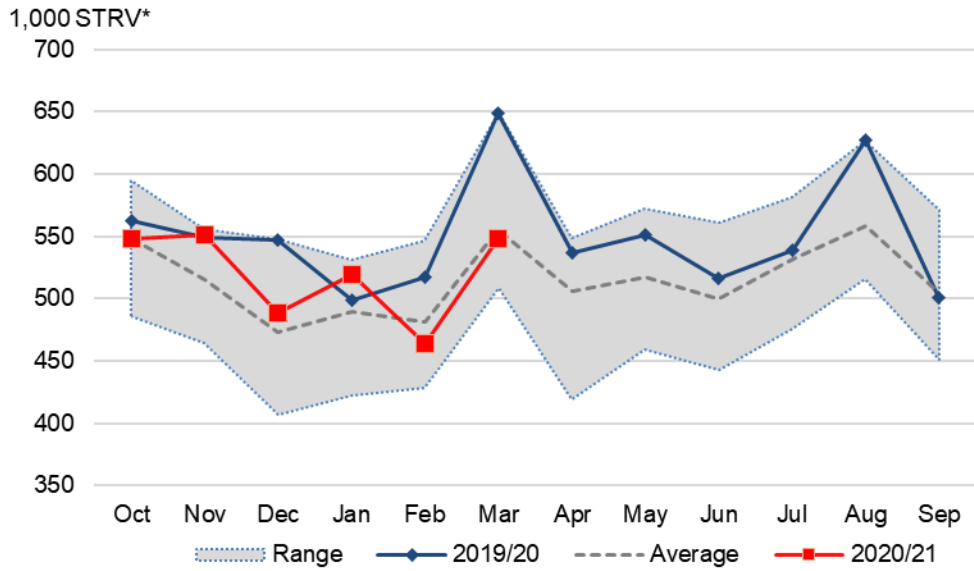


*2015/16 through 2019/20

Source: USDA, Economic Research Service and USDA, Farm Service Agency.

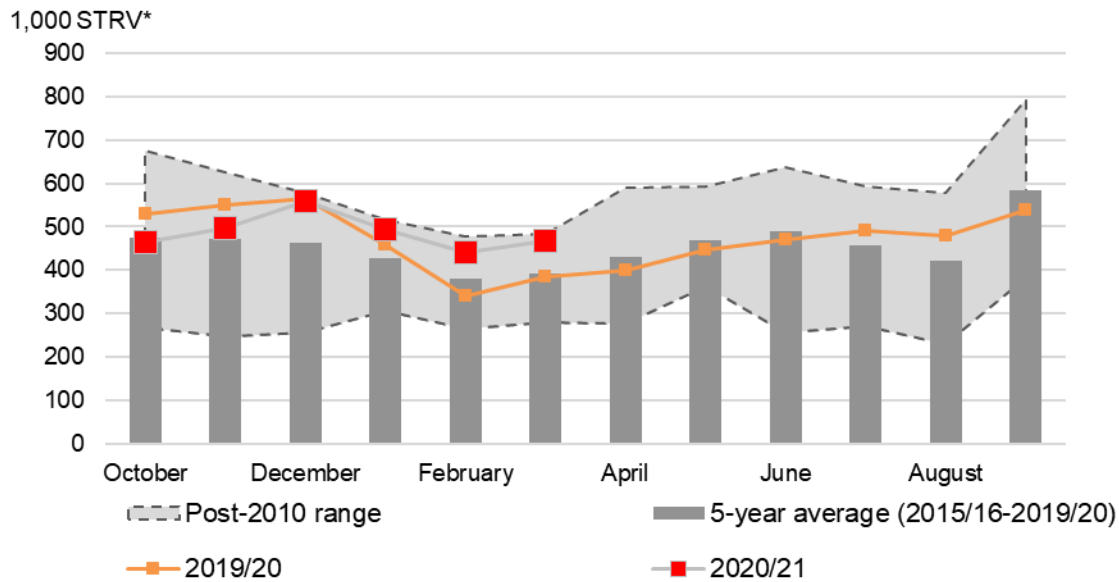
Refiners' melt rose during March and was in line with the recent 10-year average (figure 8). Both raw stocks held by refiners (figure 9) and total stocks held by sugarbeet processors (figure 10) are up from last year and the recent 5-year average.

Figure 8
Sugarcane refiners' melt, monthly, 2010/11 to 2020/21



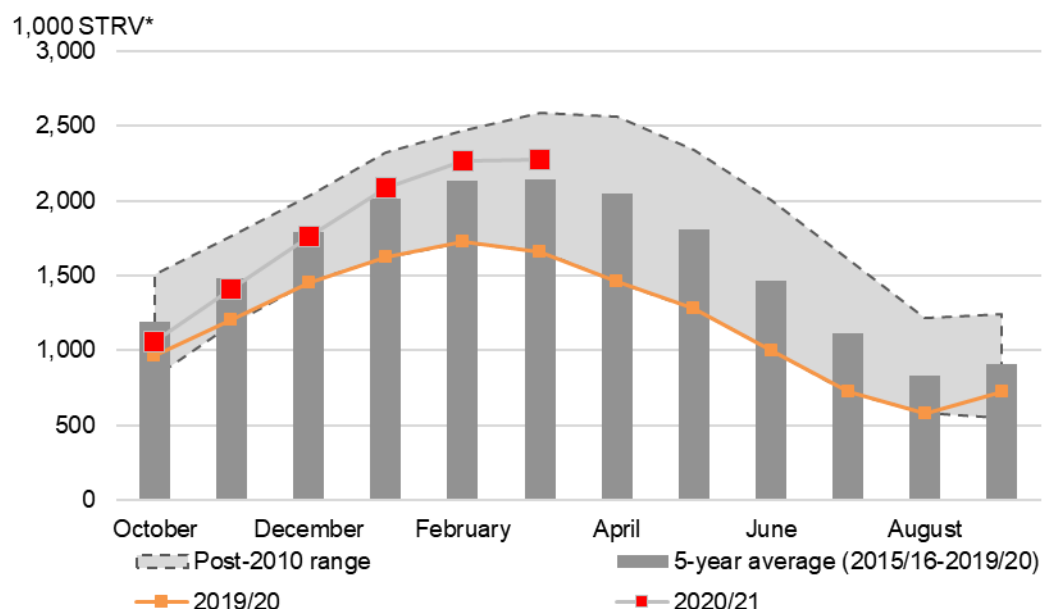
*Short tons, raw value
 Source: USDA, Farm Service Agency.

Figure 9
Sugarcane refiners' raw sugar inventories, monthly, 2015/16 to 2020/21



*Short tons, raw value
 Source: USDA, Farm Service Agency.

Figure 10
Sugarbeet processors' total sugar inventories, monthly, 2015/16 to 2020/21



*Short tons, raw value
 Source: USDA, Farm Service Agency.

2021/22 Imports Projected Lower

Total imports are projected down by 502,000 STRV to 2.652 million STRV with reductions across all major categories. Tariff-rate quota (TRQ) imports for 2021/22 are projected at 1.387 million STRV, down 286,000 from the revised 2020/21 figure, with levels set at minimum levels consistent with existing World Trade Organization (WTO) and Free-Trade Agreement (FTA) commitments. The additional Specialty Sugar TRQ for 2021/22 has yet to be announced by the Secretary of Agriculture and therefore has not been included in this forecast. Last year, it was established at 140,000 metric tons. A new level for 2021/22 will likely be established prior to the July *WASDE*. TRQ shortfall is projected at a typical base level of 99,000 STRV. High-tier imports for 2021/22 are projected at 50,000 STRV, down 150,000 from the 2020/21 based on a return to more normal levels seen prior to 2019/20. Imports from Mexico for 2021/22 are projected at 965,000 STRV.

2020/21 Imports Raised Slightly

On April 30, the U.S. Department of Commerce announced an increase in Mexico's Export Limit of 50,000 STRV, which is required to have a polarity of less than 99.2 degrees. Projected

imports under the U.S. WTO raw sugar TRQ were lowered by 48,000 STRV, as the likelihood has increased that more of the 40 countries allocated a share will not be able to ship some or all of their allotments, particularly a few of those holding larger shares. The net effect of these two changes is that total projected 2020/21 imports are raised 2,000 STRV to 3.154 million.

The April 15 tranche of the specialty sugar TRQ was oversubscribed, with 170,008 metric tons, raw value (MTRV) submitted for entry against a tranche limit of 30,000 MTRV (table 5). Each importer was therefore allowed to enter only 17.64625 percent of the amount they attempted. This leaves a presumed 140,008 MTRV stored in bonded warehouses. The next scheduled opening of this TRQ will be in October 2021 after the next fiscal year begins.

Table 5: Specialty sugar tariff-rate quota, FY 2021 tranches and prorated quantities

Tranche Number	Quantity 1/	Opening Date	Prorata (Percent)	Submitted 1/	Blocked 2/
Tranche 1	1,656	10/1/2020	13.94894	10,825	9,315
Tranche 2	40,000	10/8/2020	33.19446	120,159	80,273
Tranche 3	40,000	1/22/2021	23.64947	169,137	129,137
Tranche 5 3/	30,000	4/5/2021	16.14278	185,842	155,842
Tranche 4	30,000	4/15/2021	17.64625	1,700	(28,300)
Total	141,656				

1/ Units are metric tons raw value (MTRV).

2/ These quantities, in MTRV, are assumed held in bond until a subsequent tranche opens.

3/ Tranche 5 was initially scheduled for July 15, but was moved to April 5.

Source: U.S. Customs and Border Protection.

Projected high-tier imports are unchanged from last month at 200,000 STRV. A large upward adjustment was made to March 2020 high-tier imports. Through the first 7 months of the fiscal year, October-April, an estimated 83 percent of the projected 200,000 STRV of high-tier sugar has been imported. It is expected that the pace will drop off considerably during the remainder of the year. Regarding the organic sugar in bond, it currently appears likely that importers prefer holding that sugar and awaiting the next tranche instead of paying the high-tier duty. The spread between the U.S. refined cane sugar price (Northeast) and the world refined sugar price held steady in April at about 22 cents per pound (figure 11). The U.S. wholesale refined cane sugar price (figure 12) rose slightly in April to 42.6 cents per pound. Note that for raw sugar, the tariff is set at 33.87 cents per kilogram or 15.4 cents per pound; for refined sugar, it is set at 35.74 cents per kilogram or 16.21 cents per pound. Depending upon the country of origin, the cost of freight and associated logistics can be as low as 2-4 cents per pound for raw sugar and 4-6 cents per pound for refined sugar. The spread of domestic above world prices appears to be slightly below levels at which high-tier imports could be competitive, but any increase in domestic prices or decline in world prices could change that dynamic.

Figure 11
U.S. and world refined sugar prices, monthly, January 2018 to September 2021

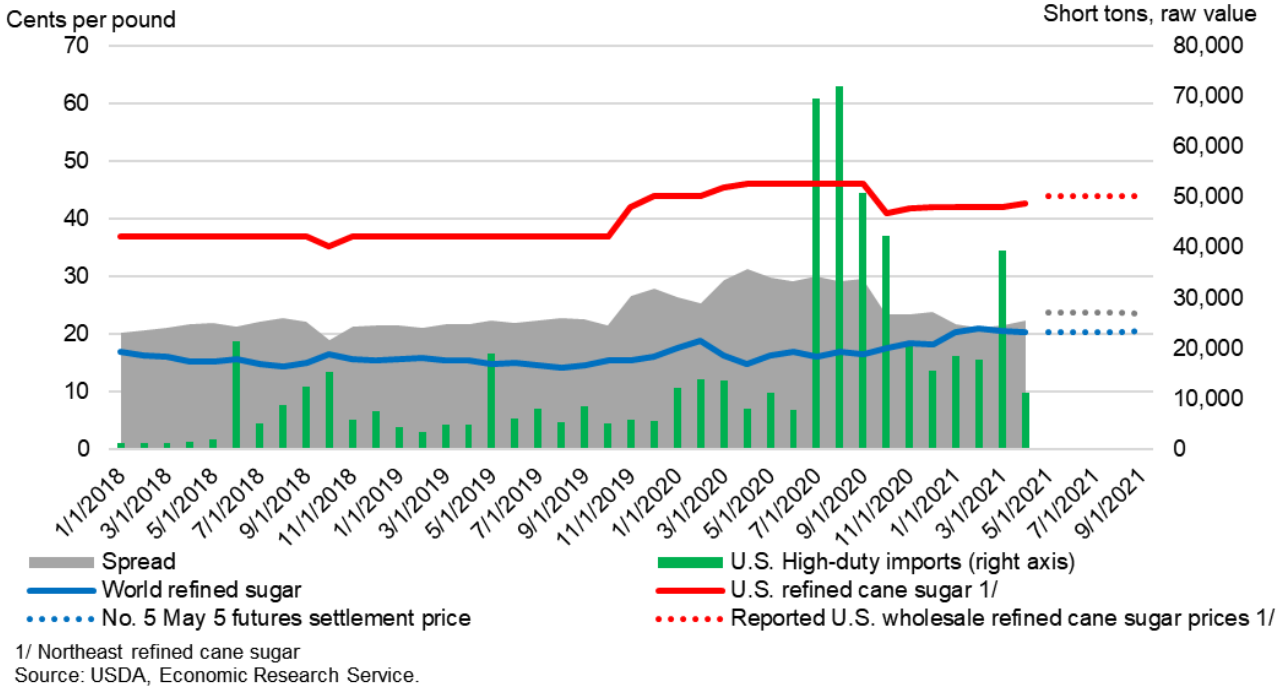
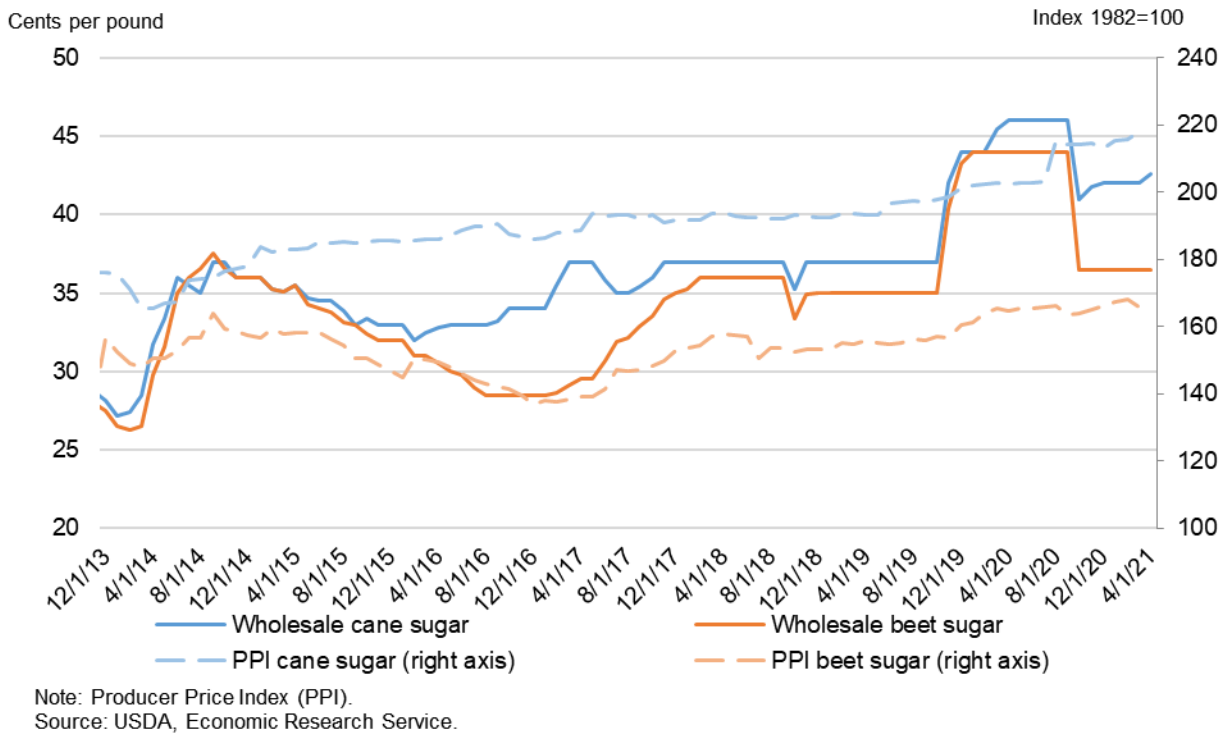


Figure 12
Refined sugar prices, wholesale and Producer Price Indexes, monthly



Mexico Outlook

Production and Deliveries Seen Lower in 2021/22

USDA's May 2021 *World Agricultural Supply and Demand Estimates (WASDE)* publication forecasts Mexico's 2021/22 sugar production at 5.809 million metric tons (MT), actual value, down slightly from the revised 2020/21 estimate (table 6). It is expected that ongoing drought conditions and poor soil quality in some locations could result in lower cane yields. Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) does not have an official forecast for 2021/22 sugar production.

The *WASDE* estimate for Mexico's 2020/21 sugar production has been revised downward from 5.90 million MT to 5.825 million. CONADESUCA published its third estimate on April 15, lowering its projection from 6.06 million MT to 5.863 million MT. In its latest projection, CONADESUCA has lowered its expectations for area, sugarcane yield, and extraction rate.

As of May 8, 2021, Mexico's total sugar produced is 5.464 million MT, up from 4.831 million at the same time last year, but down slightly from the same point in 2017/18 and 2018/19 (figure 13). To date, 737,143 hectares have been harvested, higher than the 3 most recent years. Sugarcane yields, as well as the cumulative extraction rate, are well ahead of last year but still down from the same point in 2017/18 and 2018/19 (figures 14 and 15). Note that as the season progresses, sugarcane yields tend to decline while extraction rates gradually rise. Most of Mexico's sugar produced to-date has been estándar (standard) sugar, which is the most commonly used sugar in Mexico. Through May 8, this type of sugar represents 60 percent of Mexico's cumulative sugar production, compared with 52 percent at the same time last year and 64 percent in the previous year (figure 16).

For 2020/21, deliveries of both sugar and high-fructose corn syrup (HFCS) are lowered this month (discussed in more detail in next section). Deliveries of both products are projected lower in 2021/22, continuing the trend of lower deliveries seen in recent years. For 2020/21, exports to the United States are raised 43,000 MT to 839,000 MT based on the revised export limit discussed in the U.S. section of this report. Exports to the United States are projected slightly lower in 2021/22. Mexico's stocks for both 2020/21 and 2021/22 are set at 910,000, roughly equivalent to 2.5 months of domestic consumption. This is the target Mexican authorities use to monitor and manage the domestic sugar program.

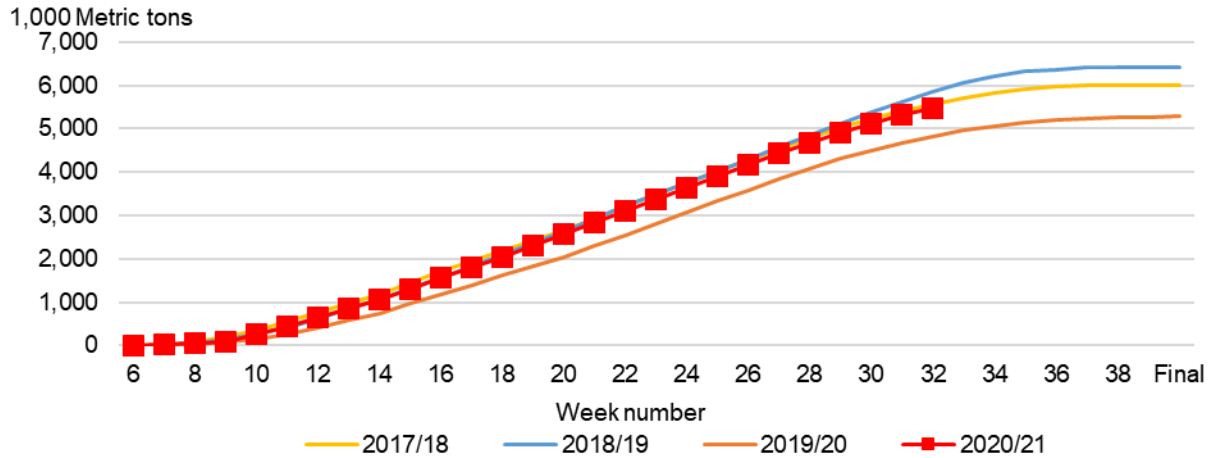
Table 6: Mexico sugar: supply and use by fiscal year (Oct./Sept.), May 2021

Items	2019/20	2020/21 (forecast) April	2020/21 (forecast) May	2020/21 Monthly Change	2021/22 (forecast) May	2021/22 Yearly Change
1,000 metric tons, actual weight						
Beginning stocks	1,169	858	858	0	910	53
Production	5,278	5,900	5,825	-75	5,809	-16
Imports	77	105	105	0	85	-20
Imports for consumption	55	40	40	0	20	-20
Imports for sugar-containing product exports, IMMEX 1/, other	23	65	65	0	65	0
Total supply	6,524	6,863	6,788	-75	6,804	17
Disappearance						
Human consumption	4,101	4,030	3,963	-67	3,955	-8
For sugar-containing product exports (IMMEX)	352	415	415	0	415	0
Other deliveries and end-of-year statistical adjustment	1	0	0	0	0	0
Total	4,455	4,445	4,378	-67	4,370	-8
Exports	1,212	1,492	1,499	7	1,524	25
Exports to the United States and Puerto Rico	1,177	797	839	43	826	-14
Exports to other countries	35	695	660	-36	698	39
Total use	5,667	5,937	5,877	-59	5,894	17
Ending stocks	858	926	910	-16	910	0
1,000 metric tons, raw value						
Beginning stocks	1,239	909	909	0	965	56
Production	5,595	6,254	6,175	-80	6,158	-17
Imports	82	111	111	0	90	-21
Imports for consumption	58	42	42	0	21	-21
Imports for sugar-containing product exports (IMMEX)	24	69	69	0	69	0
Total supply	6,916	7,274	7,195	-80	7,213	18
Disappearance						
Human consumption	4,347	4,271	4,201	-71	4,192	-8
For sugar-containing product exports (IMMEX)	373	440	440	0	440	0
Other deliveries and end-of-year statistical adjustment	1	0	0	0	0	0
Total	4,722	4,711	4,641	-71	4,632	-8
Exports	1,285	1,582	1,589	8	1,615	26
Exports to the United States and Puerto Rico	1,248	844	890	45	875	-14
Exports to other countries	37	737	699	-38	740	41
Total use	6,007	6,293	6,230	-63	6,248	18
Ending stocks	909	982	965	-16	965	0
Stocks-to-human consumption (percent)	20.9	23.0	23.0	0.0	23.0	0.0
Stocks-to-use (percent)	15.1	15.6	15.5	-0.1	15.4	0.0
High-fructose corn syrup (HFCS) consumption (dry weight)	1,388	1,377	1,325	-52	1,300	-25

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

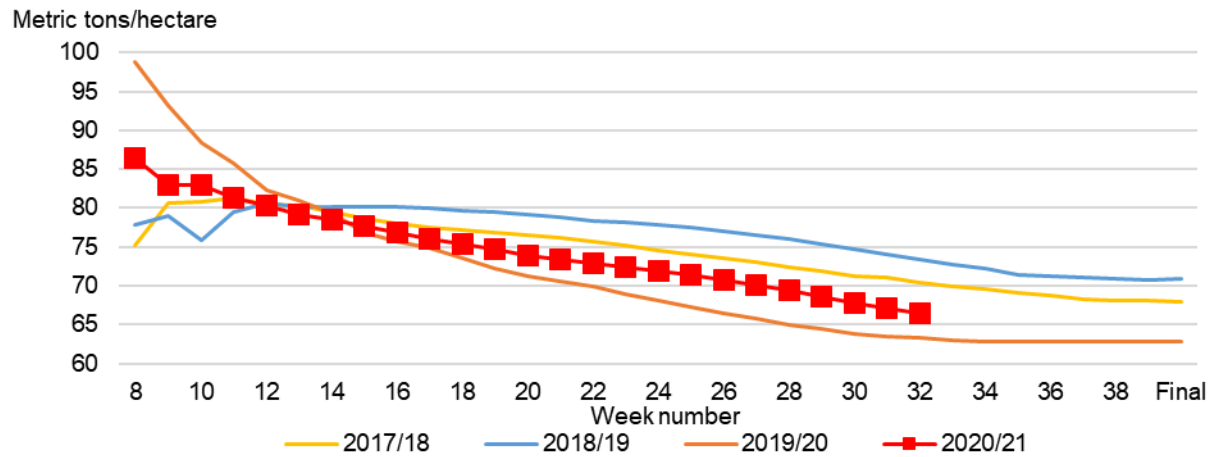
Sources: USDA, World Agricultural Outlook Board; USDA, Economic Research Service; Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 13
Mexico cumulative sugar production, by week



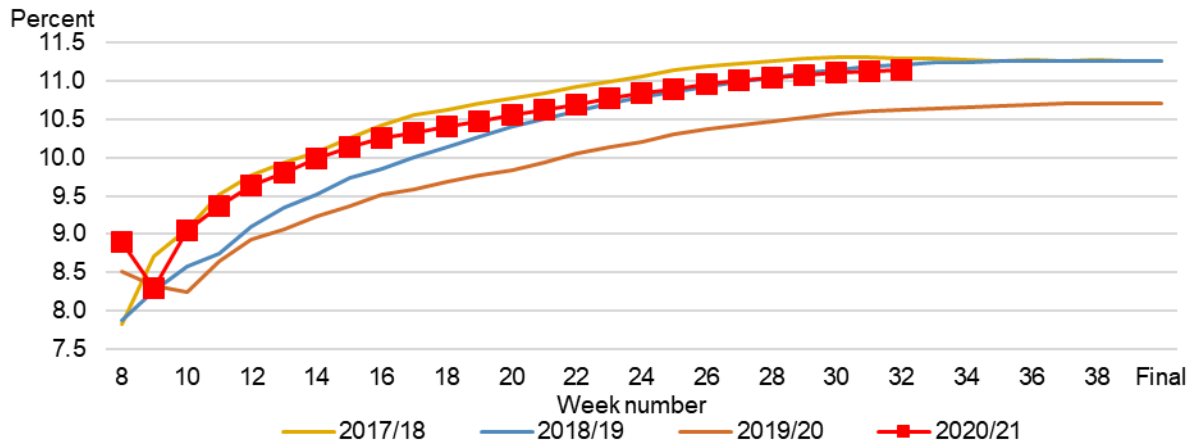
Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 14
Mexico cumulative sugarcane yields, by week



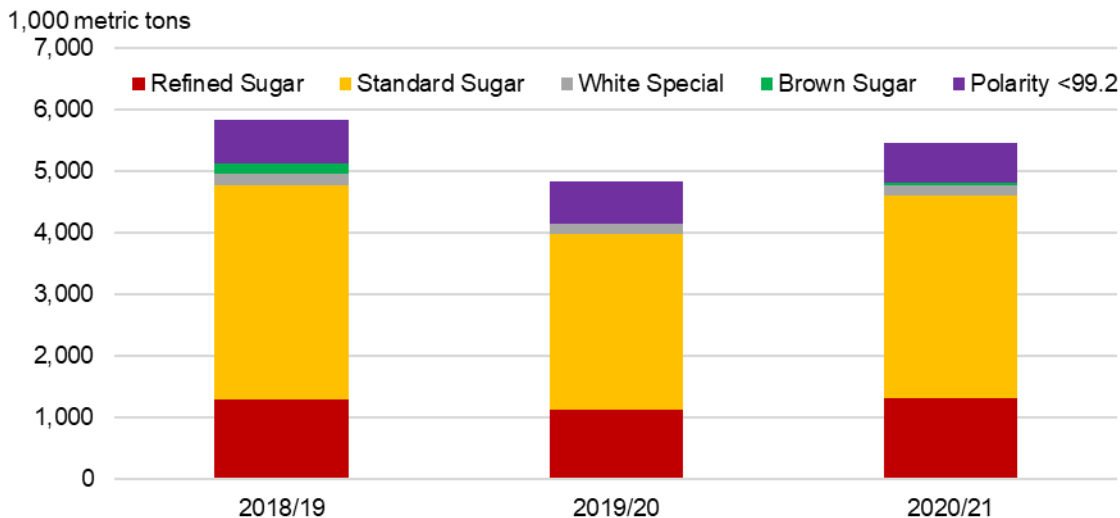
Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 15
Mexico cumulative sugar extraction rate, by week



Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 16
Mexico sugar production, by type of sugar, through week 32*



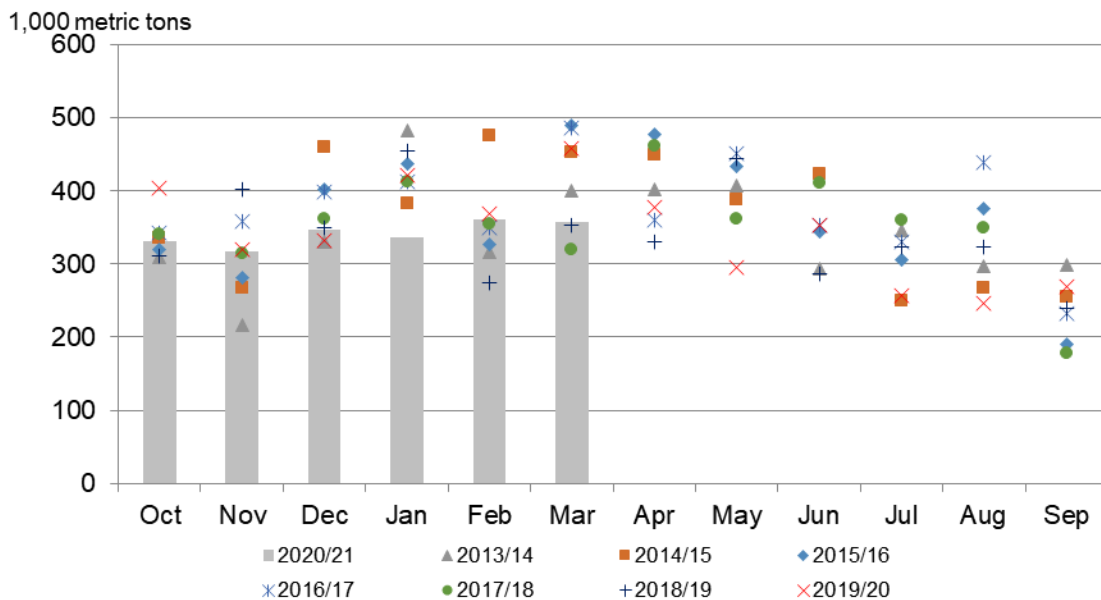
*Dates of comparison are May 8, 2021; May 9, 2020; and May 11, 2019.
 Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Deliveries Lowered

The monthly pace of sugar deliveries in 2020/21 has been consistently slower than in recent years (figure 17). Sugar deliveries for domestic consumption in 2020/21 are lowered from 4.030 million MT to 3.963 million MT, and high-fructose corn syrup (HFCS) deliveries are reduced from 1.377 million MT to 1.325 million MT (dry basis). Table 7 presents deliveries of both products from October through March, relative to full year projections. Through 6 months of data, sugar deliveries represent 51.7 percent of the revised fiscal year projection, marginally stronger than the 10-year average of 51.6 percent, but well below the pace of last year. Similarly, the pace of HFCS deliveries is slightly above the 10-year average, but well below last year. With sweetener consumption coming under increased public scrutiny, product reformulations are driving a shift towards lower consumption. In particular, front-of-pack labeling laws instituted in October 2020 have resulted in soda companies reducing their utilization of HFCS.

These product formulation changes are part of a multi-year shift to reduce sweetener consumption. At both the State and Federal level, a variety of measures have been put in place to curb sweetener consumption based on its perceived connection to high levels of obesity. As shown in figure 18, both per capita and total sweetener consumption have trended downward since 2016/17. This is expected to continue in 2021/22, with sugar consumption projected down to 3.955 million MT and HFCS down to 1.300 million MT, dry basis.

Figure 17
Mexican sugar deliveries for consumption, monthly, 2013/14 to 2020/21



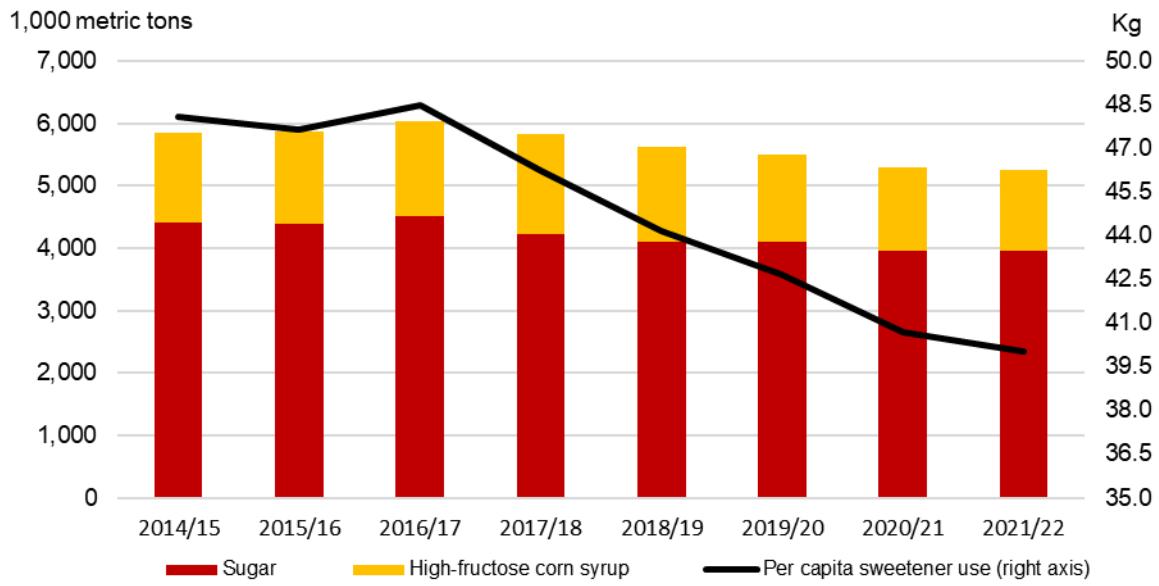
Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Table 7: Pace of Mexico sweetener deliveries through first 6 months of fiscal year

	Sugar, 1,000 metric tons (MT)			High-fructose corn syrup, 1,000 MT, dry weight		
	Oct-Mar	Fiscal year	Percent of total	Oct-Mar	Fiscal year	Percent of total
FY11	2,072	3,950	52.5	755	1,635	46.2
FY12	2,068	4,135	50.0	809	1,721	47.0
FY13	2,049	4,287	47.8	787	1,567	50.2
FY14	2,054	4,098	50.1	659	1,372	48.0
FY15	2,374	4,408	53.9	676	1,444	46.8
FY16	2,259	4,387	51.5	680	1,482	45.9
FY17	2,349	4,515	52.0	713	1,522	46.8
FY18	2,106	4,228	49.8	755	1,593	47.4
FY19	2,145	4,092	52.4	713	1,528	46.6
FY20	2,304	4,101	56.2	685	1,388	49.3
FY21 (forecast)	2,050	3,963	51.7	641	1,325	48.4
10-year average	2,178	4,220	51.6	723	1,525	47.4

Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 18
Mexico sweetener consumption by year



Source: USDA, World Agricultural Outlook Board.

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