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Outlook

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Sugar and Sweeteners Outlook

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The next release is November 15, 2010

Approved by the World Agricultural Outlook Board.

U.S. Sugar October 2010

Estimated U.S. sugar supply for fiscal year (FY) 2010 is increased 208,000 short tons, raw value (STRV), due to higher production and imports. Production is increased 98,000 STRV to account for larger-than-expected August-September output of U.S. beet sugar and an upward revision in expected Hawaii cane sugar production . Imports are increased 110,000 STRV, mainly due to higher imports from Mexico through the end of September. Total use is increased 115,000 tons to reflect strong end user demand for imported refined sugar and minor increases in sugar exports and deliveries for re-export products. Deliveries for human consumption are estimated at 10.800 million STRV. Ending stocks, calculated as the difference between total supply and use, are at 1.063 million STRV, an increase of 93,000 STRV. The implied ending-year stocks-to-use ratio is 14.4 percent.

Projected U.S. sugar supply for FY 2011 is increased 63,000 STRV from September's supply due to higher beginning stocks of 93,000 STRV more than offsetting lower expected cane sugar production of 30,000 STRV. Florida cane sugar production for FY 2011 is reduced 65,000 tons to match processor production projections of about 1.720 million STRV. FY 2010 cane sugar production in Hawaii is increased 35,000 STRV to match the FY 2010 estimate of 170,000 STRV. Deliveries for human consumption are increased 100,000 STRV to match the increase for FY 2010. The new deliveries projection is 10.875 million STRV. Ending stocks are projected at 1.047 million STRV, implying a stocks-to-use ratio of 9.3 percent.

Sugar and High Fructose Corn Syrup in the NAFTA

On October 8, 2010, the U.S. Department of Agriculture (USDA) released its latest supply and use estimates for fiscal year (FY) 2010 and projections for FY 2011 in the *World Agricultural Supply and Demand Estimates* (WASDE) report.

U.S. Production

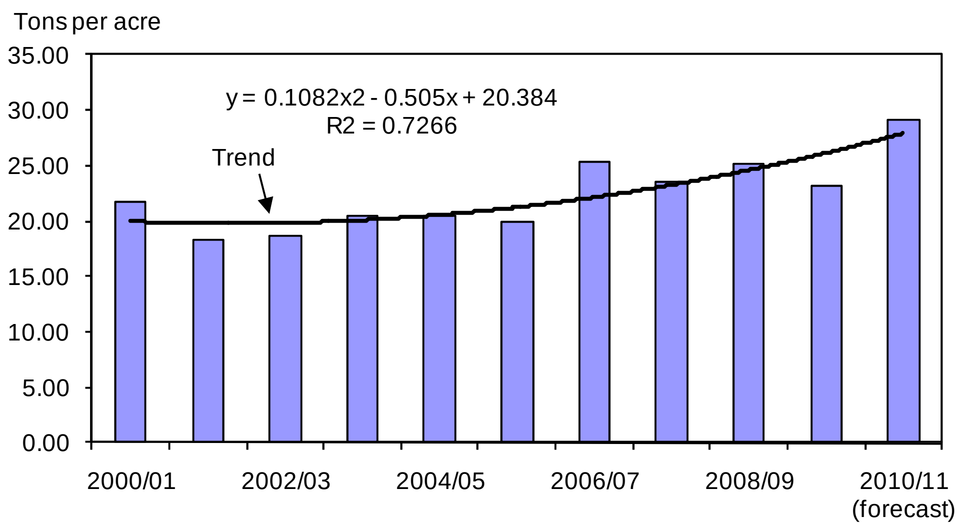
The National Agricultural Statistics Service (NASS), in its October 2010 Crop Production report, revised its forecast of 2010/11 sugar beet yields and production upward. National sugar beet yield is forecast at a record 29.6 tons per acre, 3.84 tons per acre more than last year and 2.81 tons per acre more than the previous record yield in 2008/09. Compared with last month, yields are increased in Minnesota from 28.0 tons to 29.0 tons and in North Dakota from 28.0 tons to 29.5 tons. Figure 1 shows the sharp increase in combined yields for these two States. Good growing conditions in these States and Michigan led to an early August start of the harvest and stronger-than-average production through September.

National sugar beet production is forecast at 33.256 million tons, 12.5-percent more than in 2009/10. With national area harvested forecast at 1.125 million acres, below last year's 1.149 million acres, most of the gain in sugar beet production is the result of yield growth. In the WASDE, beet sugar production for FY 2011 is projected at 4.890 million short tons, raw value (STRV). With a strong early harvest (that is, production before October 1), the beet sugar estimate for FY 2010 is increased by 75,000 STRV to 4.525 million STRV.

Although NASS did not change its forecast for 2010/11 sugarcane production, the USDA decreased overall projected cane sugar production by 30,000 STRV to 3.495 million STRV. Projected production in Florida for FY 2011 was lowered 65,000 STRV to 1.720 million STRV, in line with processor production expectations, which implies sugar production at about 4.60 tons per acre, somewhat higher than the average of 4.24 tons for the previous five seasons.

Figure 1

Sugar beet yields and trend in Minnesota and North Dakota, 2000/01-20010/11



Source: USDA, National Agricultural Statistics Service, *Crop Production*.

Hawaiian sugar production for both FY 2010 and FY 2011 is projected at 170,000 STRV. FY 2010 Hawaiian sugar production through August is estimated at 145,500 STRV. With only 1 month of production to go in FY 2010, an additional 24,500 STRV is not unreasonable. Production for FY 2011 is assumed to be at the same level as for FY 2010.

Trade

U.S. imports from Mexico were increased by 100,000 STRV to 730,000 STRV for FY 2010. Although the Foreign Agricultural Service (FAS) website showed 553,400 STRV imported from Mexico through the end of August, this amount has since been revised to show an additional 41,300 STRV imported. The most recent estimate of September imports before publication of the WASDE was 135,600 STRV. These amounts, when summed, come to 730,300 STRV for the entire fiscal year.

Other import changes to the WASDE include additions of 5,000 STRV to raw tariff-rate quota (TRQ) imports and of 5,000 STRV to imports under the Central American Free Trade Agreement (CAFTA).

Table 1 shows estimates of all import components for FY 2010, and table 2 does the same for projections for FY 2011.

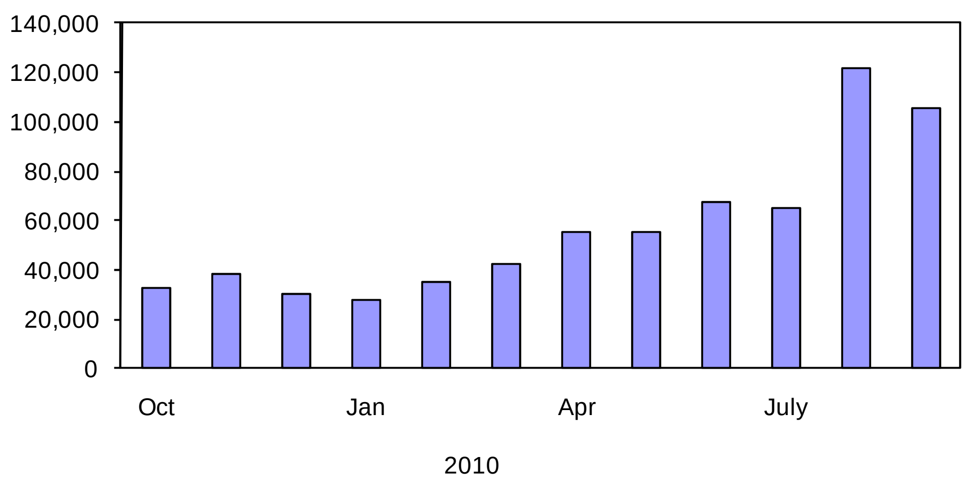
Deliveries, Exports, Refining Loss, and Stocks

Deliveries for human consumption in FY 2010 are increased 100,000 STRV to 10.800 million STRV based on increased direct consumption imports in August and September from Mexico. Although subject to revision, the Economic Research Service's Sugar and Sweetener Team believes that 59 percent of the additional imports from Mexico were for direct consumption and not for further processing. As figure 2 illustrates, the totals for August and September are far above the average for the first 10 months. Total direct consumption imports are estimated at 677,500 STRV. Pace-to-date and times series analysis of deliveries by domestic refiners and beet processors support a range between 10.100-10.125 million STRV. Deliveries for FY 2011 are projected at 10.875 million STRV, an increase of 75,000 STRV, which assumes that sugar continues to substitute for high fructose corn syrup through FY 2011 (see below).

Figure 2

Direct-consumption imports, FY 2010, by month

Short tons, raw value



Sources: USDA, Economic Research Service, Sugar and Sweeteners Team, based on analysis of data from USDA, Foreign Agricultural Service.

Table 1--USDA estimate of sugar imports in, FY 2010

	Metric tons, raw value	Short tons, raw value
Raw sugar TRQ	1,570,788	1,731,497
Less shortfall attributable to Mexico 1/	-7,258	-8,001
Less other shortfall	-85,275	-94,000
Total raw sugar TRQ	**1,478,254**	**1,629,496**
Refined sugar TRQ:		
Allocation to Canada	10,300	11,354
Allocation to Mexico	2,954	3,256
Less Mexican shortfall 1/	-2,954	-3,256
Global	7,090	7,815
Specialty:		
Base	1,656	1,825
Additional	68,039	75,000
Total refined sugar TRQ	**87,085**	**95,994**
CAFTA/DR TRQ - calendar 2010	114,639	**126,368**
Singapore, Bahrain, Jordan	42	46
Peru	2,000	2,205
Total estimate TRQ entries	**1,682,020**	**1,854,109**
Mexico	**662,252**	**730,000**
Re-export program imports	**408,237**	**450,000**
Sugar syrups, high-tier	**190,511**	**210,000**
Total projected imports	**2,943,020**	**3,244,109**

TRQ = Tariff-rate quota; CAFTA/DR = Central American Free Trade Agreement/Dominican Republic.
1/ Total entries from Mexico, quota and nonquota, reflected below.
Source: USDA, Foreign Agriculture Service.

Table 2--USDA estimate of sugar imports in, FY 2011

	Metric tons, raw value	Short tons, raw value		
Raw sugar TRQ	1,117,195	1,231,497		
Less shortfall attributable to Mexico 1/	-7,258	-8,001		
Less other shortfall	-44,452	-49,000		
Total raw sugar TRQ	**1,065,485**	**1,174,496**		
Refined sugar TRQ:				
Allocation to Canada	10,300	11,354		
Allocation to Mexico	2,954	3,256		
Less Mexican shortfall 1/	-2,954	-3,256	-60,257	-54,664
Global	7,090	7,815		
Specialty:				
Base	1,656	1,825		
Additional	77,111	85,000		
Total refined sugar TRQ	**96,157**	**105,994**		
CAFTA/DR TRQ - calendar 2011	**114,700**	**126,434**	0.982	
Singapore, Bahrain, Jordan	54	59		
Peru	2,000	2,205	128,698	
Total estimate TRQ entries	**1,278,396**	**1,409,188**		
Mexico	**498,957**	**550,000**		
Re-export program imports	**272,158**	**300,000**		
Sugar syrups, high-tier	**9,072**	**10,000**		
Total projected imports	**2,058,582**	**2,269,188**		

TRQ = Tariff-rate quota; CAFTA/DR = Central American Free Trade Agreement/Dominican Republic.
1/ Total entries from Mexico, quota and nonquota, reflected below.
Source: USDA, Foreign Agriculture Service.

Based on pace to date, deliveries for FY 2010 re-export sugar-containing products are increased 5,000 STRV to 200,000 STRV, and exports are increased 10,000 STRV to 210,000 STRV. Miscellaneous use is unchanged from that of last month at -125,000 STRV. For FY 2011, exports are projected at 150,000 STRV, other deliveries at 185,000 STRV, and miscellaneous use at zero.

Ending stocks—the difference between total supply and use—are estimated at 1.603 million STRV for FY 2010, implying an ending stocks-to-use ratio of 14.4 percent. Similarly ending stocks for FY 2011 are projected at 1.047 million STRV, implying a stocks-to-use ratio of 9.3 percent.

High Fructose Corn Syrup

The Sugar and Sweetener Team projects FY 2010 deliveries of high fructose corn syrup (HFCS) at 7.872 million tons, dry weight equivalent. As seen in figure 3, this decline continues the trend that has been in evidence for several years. This trend started early this decade with deliveries of HFCS 55 and was mostly associated with a decline of domestic sweetened beverage use (fig. 4). As seen in figure 5, deliveries of HFCS 42 were mostly unaffected until about 2007. After full implementation of the North American Free Trade Agreement (NAFTA) in January 2008, the decline in HFCS 42 use accelerated as competitively priced sugar from Mexico entered the U.S. direct-consumption market. Also, beginning in 2008, HFCS demand outside the beverage sector started to decline as demand for sugar started to pick up. However, in spite of strong gains in sugar deliveries the last three fiscal years, total (sugar plus HFCS) per capita deliveries have been falling since the start of the 2000s (fig. 6). The increase in sugar use has not fully substituted for the fall in HFCS use.

In spite of the forecast fall in HFCS deliveries, FY 2010 HFCS production is forecast to increase by 612,000 tons to 8.957 million. Exports, especially to Mexico, have been strong for the entire fiscal year (fig. 7). Exports for the first 10 months of the fiscal year have totaled 1.063 million tons, with about 81 percent of those exports going to Mexico. This export trend is expected to continue through the next fiscal year as sugar prices in Mexico are likely to stay at historically high levels. Nonetheless, HFCS prices are likely to increase throughout the coming months as forecasted corn prices have risen, as indicated in the October 2010 WASDE, which could affect the competitiveness of HFCS in the Mexican sweetener market.

Genetically Modified Sugar Beet Seeds

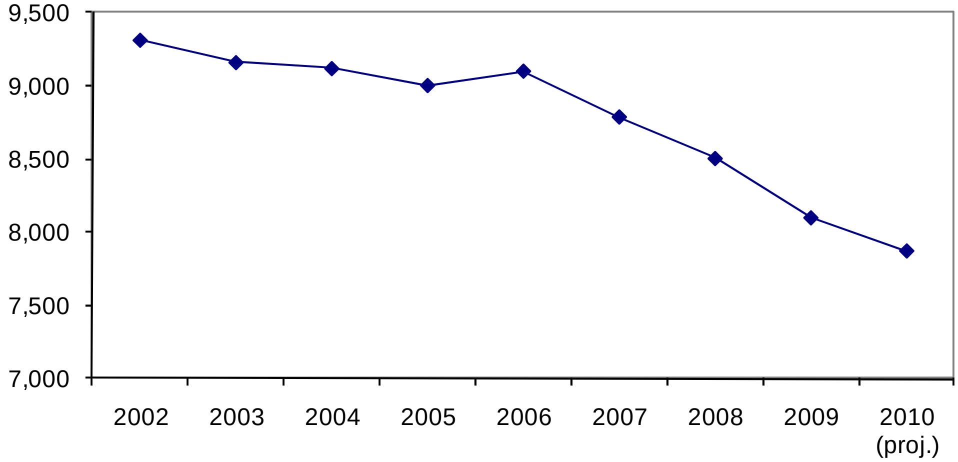
According to reports, on September 28, 2010, Federal district Judge Jeffery White announced that conservation and food safety groups challenging the planting of genetically modified sugar beet seeds would likely succeed in their court case against the USDA. These groups want a temporary restraining order and preliminary injunction that would halt the planting of the crop. The injunction would stop and likely remove all sugar beet seedlings intended to produce seed for the 2012 sugar beet crop. The judge scheduled a hearing for October 22 to receive more briefings on possible remedies.

At issue is an earlier court ruling that the USDA violated the National Environmental Policy Act by approving the planting of genetically modified seed without first preparing an Environmental Impact Statement (EIS). In August, the court vacated USDA's deregulation of the crop, which made any future planting and sale unlawful until the USDA completed the EIS. The USDA is preparing an EIS, but in early September, the USDA began issuing permits to seed companies to begin propagating seed, although the crop was technically "regulated." The USDA argued that this step did not require environmental review. In his ruling, Judge White disagreed with USDA's interpretation.

Figure 3

Domestic high fructose corn syrup deliveries, fiscal years 2002-10

1,000 tons, dry basis

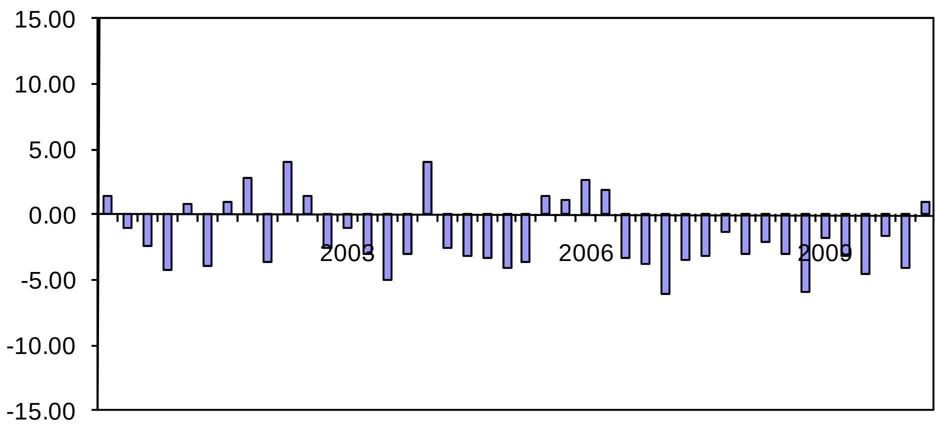


Source: USDA, Economic Research Service, Sugar and Sweeteners Team.

Figure 4

Domestic high fructose corn syrup 55 deliveries, percentage change from corresponding quarter of previous year

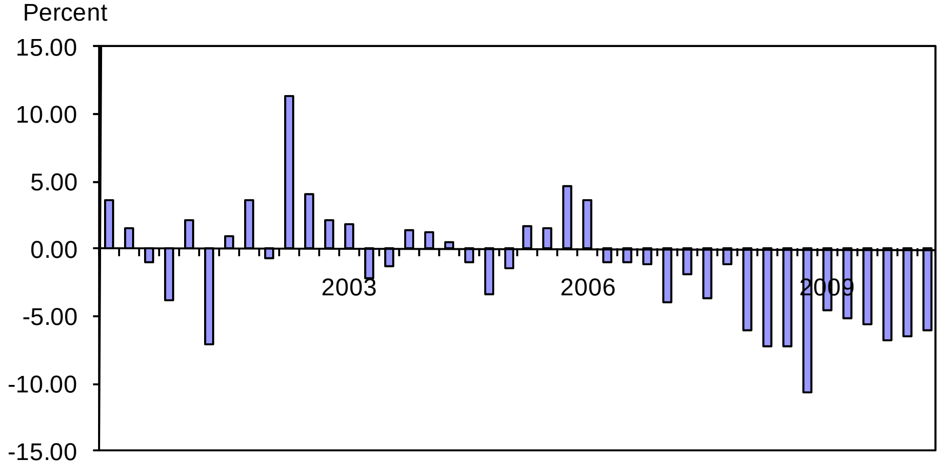
Percent



Source: ERS, Sugar and Sweeteners Team.

Figure 5

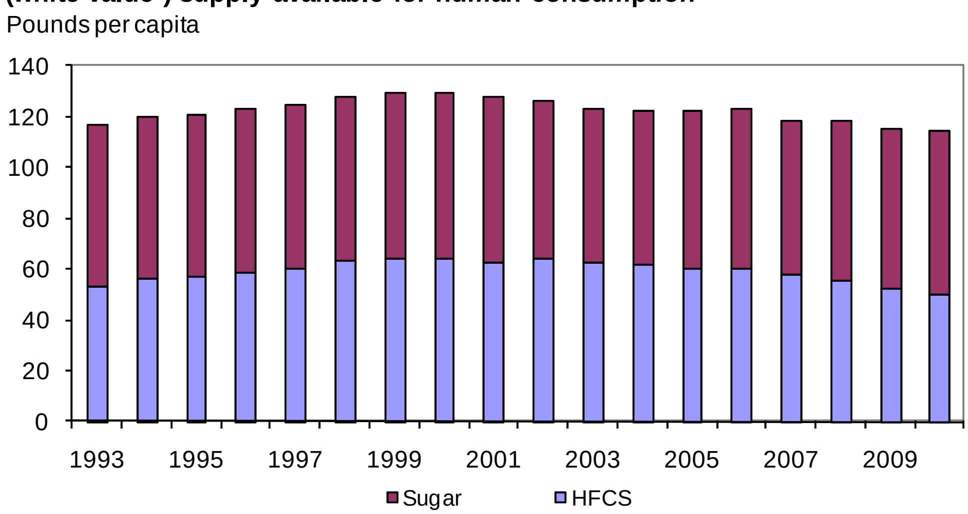
Domestic high fructose corn syrup 42 deliveries, percentage change from corresponding quarter of previous year



Source: ERS, Sugar and Sweeteners Team.

Figure 6

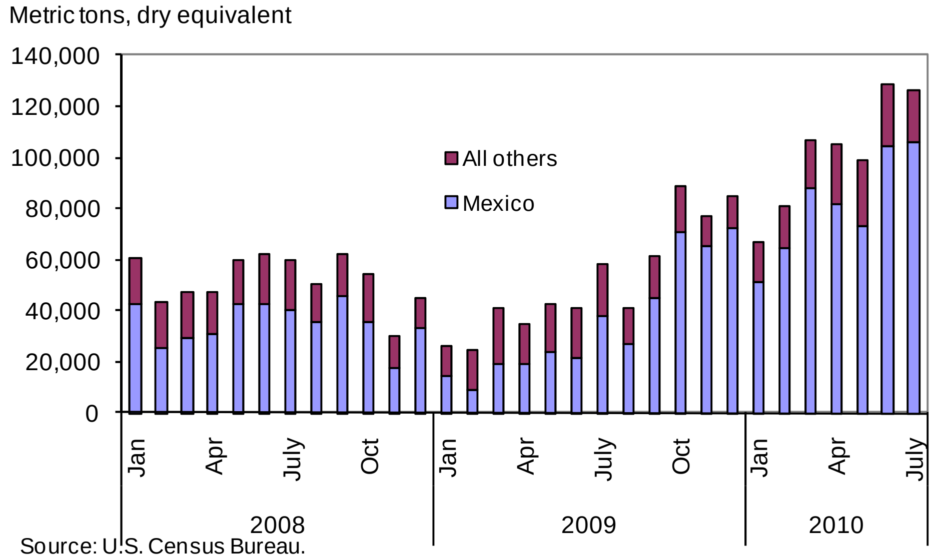
U.S. and Puerto Rico per capita High Fructose Corn Syrup and sugar (white value) supply available for human consumption



Source: USDA, *WASDE* (sugar); ERS, Sugar and Sweetener Team (HFCS).

Figure 7

U.S. High Fructose Corn Syrup exports, 2008-10



Source: U.S. Census Bureau.

Table 3--U.S. sugar: Supply and use, by fiscal year, short tons 1/, 10/13/2010

Item	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11 projection Oct-10
				1,000 short tons, raw value				
Beginning stocks 2/	1,670	1,897	1,332	1,698	1,799	1,664	1,534	1,603
Total production 3/,4/	8,649	7,876	7,399	8,445	8,152	7,531	7,945	8,385
Beet sugar	4,692	4,611	4,444	5,008	4,721	4,214	4,525	4,890
Cane sugar	3,957	3,265	2,955	3,438	3,431	3,317	3,420	3,495
Florida	2,154	1,693	1,367	1,719	1,645	1,577	1,638	1,720
Louisiana	1,377	1,157	1,190	1,320	1,446	1,397	1,500	1,465
Texas	175	158	175	177	158	152	112	140
Hawaii	251	258	223	222	182	192	170	170
Puerto Rico	0	0	0	0	0	0	0	
Total imports	1,750	2,100	3,443	2,080	2,620	3,082	3,244	2,269
Tariff-rate quota imports 5/	1,226	1,408	2,588	1,624	1,354	1,370	1,854	1,409
Other program imports	464	500	349	390	565	308	450	300
Nonprogram imports	60	192	506	66	701	1,404	940	560
Mexico 6/				60	694	1,402	730	550
Total supply	12,070	11,873	12,174	12,223	12,571	12,277	12,723	12,257
Total exports 3/	288	259	203	422	203	136	210	150
Quota-exempt for re-export	288	259	203	422	203	136	210	150
Other exports	0	0	0					
CCC disposal, for export	0	0	0					
Miscellaneous	23	94	-67	-132	0	0	-125	0
CCC disposal, for domestic nonfood use	0	0	0	0	0	0	0	0
Refining loss adjustment	0	0	0	0	0	0	-125	0
Statistical adjustment 7/	23	94	-67	-132	0	0	0	0
Deliveries for domestic use	9,862	10,188	10,340	10,135	10,704	10,607	11,035	11,060
Transfer to sugar-containing products for exports under re-export program	142	121	106	169	141	120	200	145
Transfer to polyhydric alcohol, feed	41	48	51	53	61	46	35	40
Deliveries for domestic food and beverage use 8/	9,678	10,019	10,184	9,913	10,501	10,441	10,800	10,875
Total use	10,172	10,542	10,476	10,424	10,907	10,743	11,120	11,210
Ending stocks 2/	1,897	1,332	1,698	1,799	1,664	1,534	1,603	1,047
Privately owned	0	0	0	0	0	0	0	0
CCC	0	0	0	0	0	0	0	0
					Percent			
Stocks-to-use ratio	18.65	12.63	16.21	17.25	15.26	14.28	14.42	9.34

CCC = Commodity Credit Corporation.

Note: Numbers may not add due to rounding.

1/ Fiscal year beginning October 1. 2/ Stocks in hands of primary distributors and CCC. 3/ Historical data are from USDA Farm Service Agency *(* FSA) (formerly Agricultural Stabilization and Conservation Service) for *Sweetener Market Data* (SMD) and USDA, National Agricultural Statistics prior to 1992. 4/ Prodcution reflects processors' projection compiled by FSA. 5/ Actual arrivals under the tariff-rate quota (TRQ) with late entries, early entries, and TRQ overfills assigned to the fiscal year in which they actually arrived.. The 2010/11 available TRQ assumes shortfall of 160,257 tons. 6/ Starting in 2007/08, total includes imports under Mexico's World Trade Organization TRQ allocation for raw and refined sugar. 7/ Calculated as a residual. Largely consists of invisible stocks change. 8/ For FY 2008-09, combines SMD deliveries for domestic human use, SMD miscellaneous uses, and the difference between SMD *imports and World Agricultural Supply and Demand Estimates* imports.

Table 4--U.S. sugar: Supply and use (including Puerto Rico), fiscal years, metric tons 1/, 10/13/2010

Item	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
	1,000 metric tons, raw value							
Beginning stocks 2/	1,515	1,721	1,208	1,540	1,632	1,510	1,392	1,454
Total production 3/ 4/	7,846	7,145	6,712	7,662	7,396	6,832	7,208	7,607
Beet sugar	4,257	4,183	4,032	4,543	4,283	3,822	4,105	4,436
Cane sugar	3,590	2,962	2,681	3,119	3,113	3,009	3,103	3,171
Florida	1,954	1,536	1,241	1,559	1,492	1,431	1,486	1,560
Louisiana	1,249	1,049	1,079	1,198	1,312	1,267	1,361	1,329
Texas	159	143	159	161	143	138	102	127
Hawaii	228	234	202	201	165	174	154	154
Puerto Rico	0	0	0	0	0	0	0	0
Total imports	1,588	1,905	3,124	1,887	2,377	2,767	2,943	2,058
Tariff-rate quota imports 5/	1,113	1,277	2,348	1,473	1,229	1,243	1,682	1,278
Other program imports	421	454	317	354	513	279	408	272
Nonprogram imports	54	174	459	60	636	1,274	853	508
Mexico 6/	0	0	0	54	630	1,272	662	499
Total supply	10,950	10,771	11,044	11,088	11,405	11,138	11,542	11,119
Total exports 3/	261	235	184	383	184	124	191	136
Quota-exempt for re-export	261	235	184	383	184	124	181	136
Other exports	0	0	0	0	0	0	0	0
CCC disposal, for export	0	0	0	0	0	0	0	0
Miscellaneous	20	85	-61	-120	0	0	0	0
CCC disposal, for domestic nonfood use	0	0	0	0	0	0	0	0
Refining loss adjustment	0	0	0	0	0	0	0	0
Statistical adjustment 7/	20	85	-61	-120	0	0	0	0
Deliveries for domestic use	8,947	9,243	9,381	9,194	9,710	9,623	10,011	10,033
Transfer to sugar-containing products for exports under re-export program	129	110	96	153	128	109	181	132
Transfer to polyhydric alcohol, feed	38	44	46	48	56	42	32	36
Deliveries for domestic food and beverage use 8/	8,780	9,089	9,239	8,993	9,527	9,472	9,798	9,866
Total use	9,228	9,563	9,504	9,457	9,895	9,747	10,201	10,170
Ending stocks 2/	1,721	1,208	1,540	1,632	1,510	1,392	1,341	950
Privately owned	0	0	0	0	0	0	0	0
CCC	0	0	0	0	0	0	0	0
	Percent							
Stocks-to-use ratio	18.65	12.63	16.21	17.25	15.26	14.28	13.14	9.34

CCC = Commodity Credit Corporation.

Note: Numbers may not add due to rounding.

1/ Fiscal year beginning October 1. 2/ Stocks in hands of primary distributors and CCC. 3/ Historical data are from USDA, Farm Service Agency (FSA), Agricultural Stabilization and Conservation Service (formerly ASCS) *Sweetener Market Data* (SMD) and USDA, National Agricultural Statistics Service, *Sugar Market Statistics* prior to 1992. 4/ Production reflects processors' projections compiled by the FSA. 5/ Actual arrivals under the tariff-rate quota (TRQ) with late entries, and TRQ overfills assigned to the fiscal year in which they actually arrive. The 2010/11 available TRQ assumes shortfall of 145,383 tonnes. 6/ Starting in 2007/08, total includes imports under Mexico's World Trade Organization TRQ allocation for raw and refined sugar. 7/ Calculated as a residual. Largely consists of invisible stocks change. 8/ For FY 2008-09, combines SMD deliveries for domestic and human use, SMD miscellaneous uses, and the difference between SMD imports and *World Agricultural Supply and Demand Estimates* imports.

Table 5--Mexico: Sugar production and supply and sugar and high fructose corn syrup (HFCS) utilization, 10/13/2010

Fiscal year (Oct/Sept)	2003	2004	2005	2006	2007	2008	2009	2010 1/	2011 1/
					1,000 Metric Tons				
Beginning stocks	1,172	1,194	1,237	1,965	1,294	1,718	1,975	624	687
Production	5,229	5,330	6,149	5,604	5,633	5,852	5,260	5,115	5,450
Imports	63	327	268	240	474	226	160	820	150
Supply	6,464	6,851	7,654	7,809	7,401	7,796	7,395	6,559	6,287
Disappearance									
Human consumption	5,097	5,380	5,279	5,326	5,133	5,090	5,065	4,812	4,618
Other consumption	135	220	282	323	390	414	475	400	400
Miscellaneous						-360	-136		
Total	5,232	5,600	5,561	5,649	5,523	5,144	5,404	5,212	5,018
Exports	38	14	128	866	160	677	1,367	660	500
Total use	5,270	5,614	5,689	6,515	5,683	5,821	6,771	5,872	5,518
Ending stocks	1,194	1,237	1,965	1,294	1,718	1,975	624	687	769
Stocks-to-human cons.	23.4	23.0	37.2	24.3	33.5	38.8	12.3	14.3	16.7
Stocks-to-use	22.7	22.0	34.6	19.9	30.2	33.9	9.2	11.7	13.9
HFCS cons. (dry weight)	130	135	355	667	698	782	653	1,450	1,700

Source: USDA, Foreign Agricultural Service, Production, Supply and Distribution Online database (historical data); USDA, *World Agricultural Supply and Demand Estimates* , (forecast data).

1/ Forecast.

Crop Conditions for India and Brazil

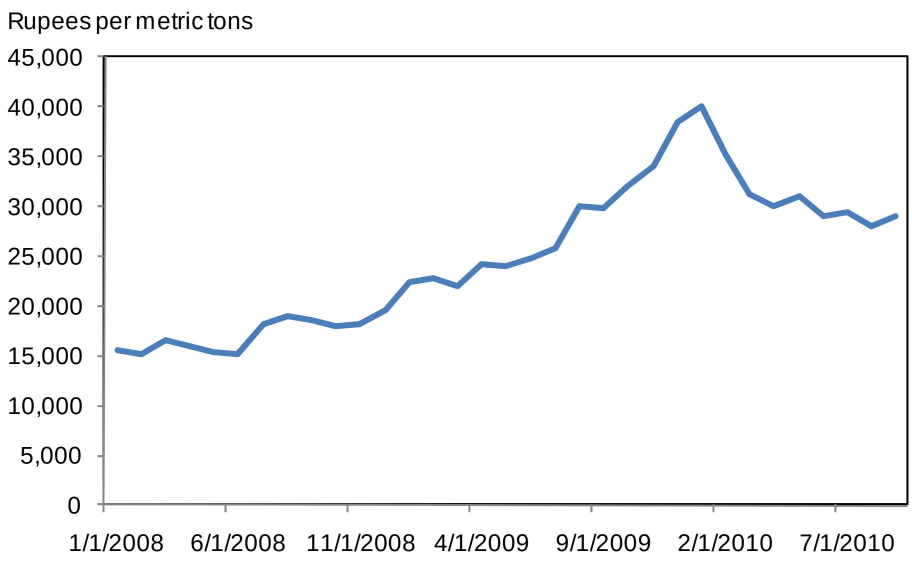
Higher cane prices paid by millers will help boost 2009/10 sugar production in India, according to Foreign Agricultural Service (FAS) reports. As a result of higher prices at mills for sugar cane, less sugar cane has been diverted to production of gur, an alternative Indian sweetener. Sugar prices in India have declined since this January's peaks, as 2009/10 production eased tight sugar supplies. Increased cane area in 2010/11 will continue to improve sugar balances.

Prices increased substantially in 2009 and early in 2010, as a sharp decline in domestic production forced India to become a net importer on the global market, tightening supplies in India and contributing to higher world prices. September 2010 prices are 3 percent below last year's levels, as supplies have increased since last year. However, they are still over 50 percent higher than prices in September 2008, signaling that supplies are still tight relative to historical levels.

Brazil's current crop has experienced dry weather through mid-September, which has accelerated the harvest rate, compared with last year's rainy harvest season. The Brazilian harvest is expected to be complete by early December, according to FAS, in contrast to last year when crushing continued into the new year. The dry weather is likely to affect sugar cane yields for the upcoming 2010/11 marketing year. Lower cane yields are expected to be at least partially offset by higher sucrose levels, however.

Figure 8

Domestic Indian Sugar Prices, 2008-10



Sources: USDA, Foreign Agricultural Service; Indian Sugar Mills Association.

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Data

Tables from the *Sugar and Sweeteners Yearbook* are available in the Sugar and Sweeteners Briefing Room at http://www.ers.usda.gov/briefing/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/
WASDE http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documented=1194
Sugar Briefing Room, http://www.ers.usda.gov/briefing/Sugar/

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