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Sugar and Sweeteners Outlook

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The next release is October 16, 2012.

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U.S. Sugar September 2012

The *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar* (CNDSCA) in Mexico estimates sugar production in 2012/13 at 5.253 million metric tons. Sugarcane area for 2012/13 is forecast at 687,286 hectares (ha), about 2.3 percent below the record area harvested in 2011/12. Sugarcane yield for 2012/13 is forecast at 67.86 mt per ha, slightly higher than yields for the last 2 crop years but well below the yields for the period 2000/01 through 2007/08. Sugar recovery for 2012/13 is forecast at 11.26 percent. This forecast is higher than last year's low 10.92 percent but significantly below the 11.75 percent of 2010/11.

On September 10, 2012, the Office of the Secretary of Agriculture announced the Fiscal Year (FY) 2013 raw and refined sugar tariff-rate quotas (TRQs) and the Overall Allotment Quantity (OAQ) for sugar marketing in FY 2013. The FY 2013 TRQ for raw cane sugar is set at 1,231,497 short tons, raw value (STRV), or 1,117,195 metric tons, raw value (MTRV), the minimum to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreement on Agriculture. The USDA established the FY 2013 refined sugar TRQ at 129,250 STRV (117,254 MTRV). Of this quantity, 106,825 STRV (96,910 MTRV) is reserved for the importation of specialty sugars. The USDA established the FY 2013 OAQ at the minimum quantity of 9,711,250 STRV. This quantity corresponds to 85 percent of estimated FY 2013 sugar consumption.

On September 12, 2012, the U.S. Department of Agriculture (USDA) released its latest U.S. and Mexico sugar supply and use estimates for FY 2012 and projections for FY 2013 in the *World Agricultural Supply and Demand Estimates* (WASDE) report. Changes in the FY 2012 supply and use balance, mostly trade, were made on the basis of pace-to-date. Overall FY 2012 imports were decreased by 139,600 STRV. Also, an

increase in exports was offset by a decrease in product re-export deliveries. The ending FY 2012 stocks-to-use ratio is estimated at 13.5 percent, a drop of 1.2 percentage points from last month. Changes in the FY 2013 supply and use forecasts stemmed from lower beginning stocks and increased imports of refined specialty sugar of 105,000 STRV above minimum WTO requirements. The ending FY 2013 stocks-to-ratio is projected at 12.3 percent.

Sugar in the NAFTA

In mid-August 2012, the *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar* (CNDSCA) in Mexico published its first forecast of Mexican sugarcane and sugar production for the upcoming 2012/13 crop year. On September 10, 2012, the Office of the Secretary of Agriculture announced the Fiscal Year (FY) 2013 raw and refined sugar tariff-rate quotas (TRQs) and the Overall Allotment Quantity (OAQ) for sugar marketing in FY 2013. On September 12, 2012, the U.S. Department of Agriculture (USDA) released its latest U.S. and Mexico sugar supply and use estimates for FY 2012 and projections for FY 2013 in the *World Agricultural Supply and Demand Estimates* (WASDE) report.

First Estimate of 2012/13 Mexico Sugarcane and Sugar Production

The CNDSCA made its first production forecast for the 2012/13 crop year that starts on October 1, 2012 and runs through September 30, 2013. 2012/13 sugarcane in Mexico is forecast at 46.642 million metric tons (mt) and 2012/13 sugar is forecast at 5.253 million mt. The forecast is based on surveys of the 57 factories that are expected to produce sugarcane and sugar during 2012/13. Table 1 shows results by factory and by regional groupings of these factories.[1]

Sugarcane area for 2012/13 is forecast at 687,286 hectares (ha), about 2.3 percent below the record area harvested in 2011/12. Figure 1 shows that area is expected to expand modestly in both the largest producing Gulf area and the smallest producing Northwest area in Sinaloa State. All other areas show modest decreases.

Sugarcane yield for 2012/13 is forecast at 67.86 mt per ha, slightly higher than yields for the last 2 crop years but well below the yields for the period 2000/01 through 2007/08, which were all above 70 mt per ha. Figure 2 shows that the largest regional increases over past year are in the Northeast and the Gulf regions. As seen in figure 3, cumulative 2012 rainfall through the first week of September in the Northeast is well above the low total for the corresponding period last year and slightly above the average for the 5 preceding years. This year’s rainfall in Veracruz State, where most Gulf regional factories are located, is well above the average for the 5 preceding years and the same period last year. Yields in other regions are close to those of either the year before or 2 years before.

Sugar recovery for 2012/13 is forecast at 11.26 percent. This forecast is higher than last year’s low 10.92 percent but significantly below the 11.75 percent of 2010/11. Figure 4 shows the regional rates compared with those of the last 2 years. All forecast recovery rates except for that of the Central region are higher than last year. All forecast rates except for that of the Pacific region, however, are lower than the rates in 2010/11.

1 The Sugar and Sweetener Outlook has adopted the same factory regional groupings as those used by LMC International in its reporting of regional costs of sugar production and other production variable categories.

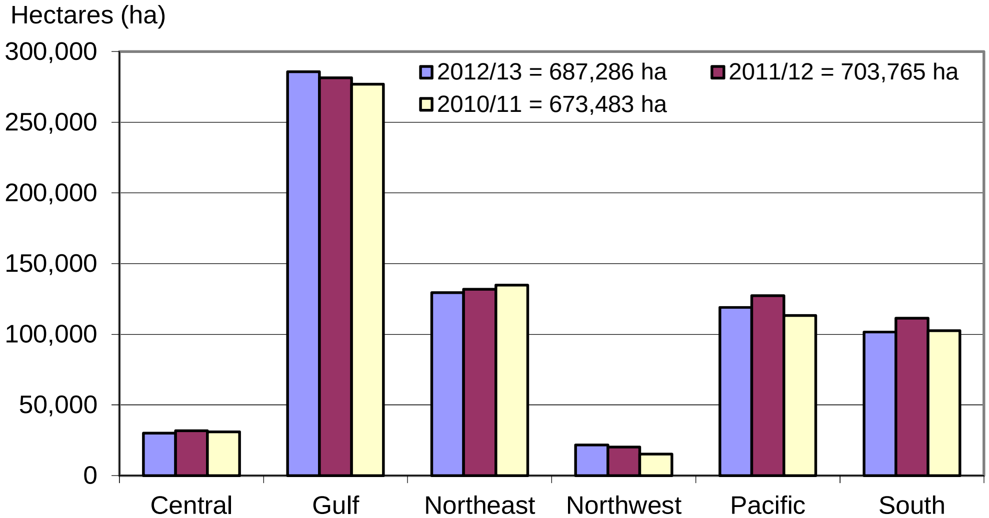
Table 1 -- First 2012/13 production forecast made by Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar (CNDSCA)

Region/Factories	Municipality	State	Owner	Area (Hectares)	Sugarcane (Metric tons)	Sugar (Metric tons)
Central Region - 4 factories						
ATENCINGO	Chietla	Puebla	FEESA	13,380	1,445,947	186,166
CALIPAM	Coxcatlán	Puebla	GARCIA GONZALEZ	1,974	190,853	18,540
CASASANO (LA ABEJA)	Cuautla	Morelos	FEESA	3,951	408,829	50,431
EMILIANO ZAPATA	Zacatepec de Hidalgo	Morelos	FEESA	10,673	1,109,266	137,740
				29,978	3,154,895	392,877
Gulf Region - 22 factories						
ADOLFO LÓPEZ MATEOS	Tuxtepec	Oaxaca	PIASA	23,855	1,362,919	158,125
CENTRAL MOTZORONGO	Tezonapa	Veracruz	MOTZORONGO	17,916	1,167,803	129,294
CENTRAL PROGRESO	Paso del Macho	Veracruz	LA MARGARITA	10,640	594,072	72,484
CONSTANCIA	Tezonapa	Veracuz	BETA SAN MIGUEL	12,514	690,442	75,466
EL CARMEN	Ixtaczoquitlán	Veracruz	GARCIA GONZALEZ	8,648	585,340	59,469
EL MODELO	La Antigua	Veracruz	FEESA	10,609	1,004,314	113,616
EL POTRERO	Atoyac	Veracruz	FEESA	20,407	1,420,145	172,695
EL REFUGIO	Cosolapa	Oaxaca	MOTZORONGO	6,357	364,647	39,921
INDEPENDENCIA	Martínez de La Torre	Veracruz	GOBIERNO DEL ESTADO DE VERACRUZ	1564	101652	8180
LA CONCEPCIÓN	Jilotepec	Veracruz	GOBIERNO DEL ESTADO DE VERACRUZ	835	79195	7310
LA GLORIA	Ursulo Galván	Veracruz	GRUPO AZUCARERO DEL TROPICO	20,497	1,418,970	172,576
LA PROVIDENCIA	Cuichapa	Veracruz	FEESA	11,802	739,571	83,264
MAHUIXTLAN	Coatepec	Veracruz	ZUCARMEX	5,053	394,957	44,928
NUEVO SAN FRANCISCO (NARANJAL)	Lerdo de Tejada	Veracruz	GARCIA GONZALEZ	8,847	482,912	44,102
PABLO MACHADO (LA MARGARITA)	Acatlan de Pérez Figueroa	Oaxaca	LA MARGARITA	13,733	763,633	91,756
SAN CRISTOBAL	Carlos A. Carrillo	Veracruz	FEESA	40,099	2,325,695	239,370
SAN GABRIEL	Cosamalopan	Veracruz	GOBIERNO DEL ESTADO DE VERACRUZ	4409	273267	27795
SAN JOSÉ DE ABAJO	Cuitlahuac	Veracruz	PERNO	7,998	516,031	56,676
SAN MIGUELITO	Cordoba	Veracruz	FEESA	5,844	486,502	52,892
SAN NICOLAS	Cuichapa	Veracruz	FANJUL	9,838	569,712	62,247
SAN PEDRO	Lerdo de Tejada	Veracruz	PORRES	12,545	860,342	84,916
TRES VALLES	Tres Valles	Veracruz	PIASA	31,687	1,737,092	203,307
				285,697	17,939,213	2,000,389
Northeast - 8 factories						
AARÓN SÁENZ GARZA	Xicotencatl	Tamaulipas	SAENZ	15,227	1,070,673	118,027
ALIANZA POPULAR	Tamasopo	San Luis Potosí	SANTOS	16,960	909,986	106,239
EL HIGO	El Higo	Veracruz	ZUCARMEX	14,820	1,066,250	117,148
EL MANTE	Cd. Mante	Tamaulipas	SAENZ	14,130	920,993	94,862
PLAN DE AYALA	Cd. Valles	San Luis Potosí	SANTOS	16,557	861,331	94,610
PLAN DE SAN LUIS	Cd. Valles	San Luis Potosí	FEESA	16,600	918,126	108,167
SAN MIGUEL DEL NARANJO	El Naranjo	San Luis Potosí	BETA SAN MIGUEL	20,502	1,137,835	136,913
ZAPOAPITA - PÁNUCO	Pánuco	Veracruz	LA MARGARITA	14,633	1,092,592	126,349
				129,429	7,977,786	902,315
Northwest - 3 factories						
ELDORADO	Culiacan	Sinaloa	GPO. AZUC. MEX.	5,159	526,309	51,094
LA PRIMAVERA	Navolato	Sinaloa	ZUCARMEX	4,528	411,984	37,649
LOS MOCHIS	Ahome	Sinaloa	AGA	11,951	805,069	73,122
				21,638	1,743,362	161,865
Pacific - 12 factories						
BELLAVISTA	Acatlan de Juárez	Jalisco	SANTOS	5,266	399,626	45,656
EL MOLINO	Tepic	Nayarit	MENCHACA	9,284	651,332	82,799
JOSE MA. MARTINEZ (TALA)	Tala	Jalisco	GPO. AZUC. MEX.	20,453	1,666,798	191,781
JOSÉ MARÍA MORELOS	Casimiro Castillo	Jalisco	FEESA	7,781	525,955	58,362
LÁZARO CÁRDENAS	Taretan	Michoacan	GPO. AZUC. MEX.	3,153	263,352	31,523
MELCHOR OCAMPO	Autlán de Navarro	Jalisco	ZUCARMEX	8,361	868,946	102,080
PEDERNALES	Tacámbaro	Michoacan	SANTOS	3,424	311,573	35,100
PUGA	Tepic	Nayarit	AGA	18,281	1,265,175	149,985
QUESERIA	Cd. Cuauthemoc	Colima	BETA SAN MIGUEL	12,657	940,443	106,486
SAN FRANCISCO AMECA	Ameca	Jalisco	BETA SAN MIGUEL	11,151	858,165	101,255
SANTA CLARA	Los Reyes	Michoacan	PORRES	7,037	573,158	67,818
TAMAZULA	Tamazula	Jalisco	SAENZ	12,119	1,296,443	159,161
				118,967	9,620,966	1,132,006
South - 8 factories						
AZSUREMEX - TENOSIQUE	Tenosique	Tabasco	JIMENEZ SAINZ	3,438	190,063	16,899
CUATOTOLAPAM	Hueyapan de Ocampo	Veracruz	SANTOS	10,000	500,868	51,114
HUIXTLA	Huixtla	Chiapas	PORRES	12,901	982,399	95,869
LA JOYA	Champotón	Campeche	GRUPO AZUCARERO DEL TROPICO	8,668	345,144	37,811
PRESIDENTE BENITO JUÁREZ	H. Cárdenas	Tabasco	GPO. AZUC. MEX.	16,795	870,251	89,731
PUJILTIC (CIA. LA FE)	Venustiano Carranza	Chiapas	ZUCARMEX	15,942	1,456,268	179,792
SAN RAFAEL DE PUCTÉ	Othon P. Blanco	Quintana Roo	BETA SAN MIGUEL	24,515	1,343,796	137,061
SANTA ROSALIA	H. Cárdenas	Tabasco	BETA SAN MIGUEL	9,318	516,849	55,544
				101,577	6,205,638	663,821
MEXICO				687,286	46,641,860	5,253,273

Source: http://www.cndsca.gob.mx/documentosmenuvertical/Pronostico%20zafra%2012-13a.pdf.

Figure 1

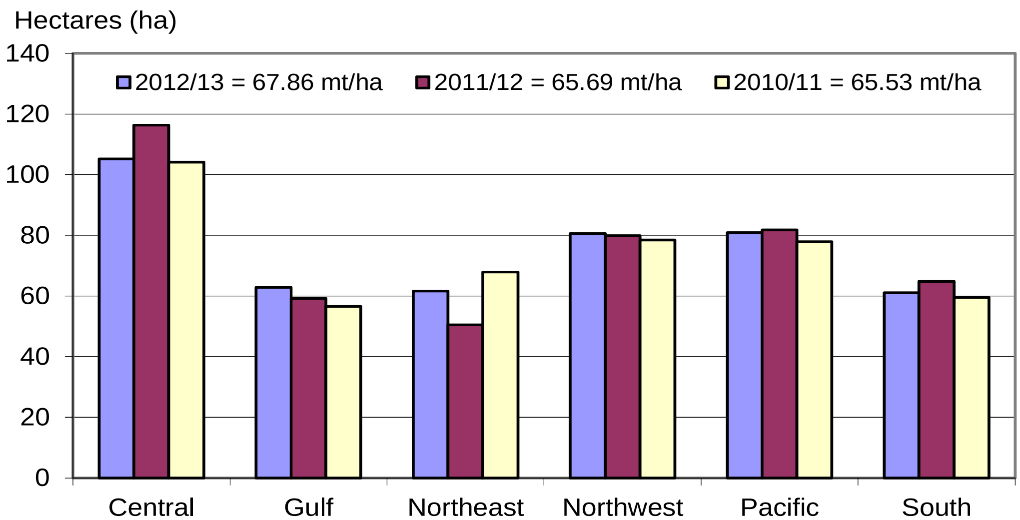
Mexico sugarcane area: 2012/13 forecast compared with estimated 2010/11 and 2011/12, by region



Source: *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar (*CNDSCA).

Figure 2

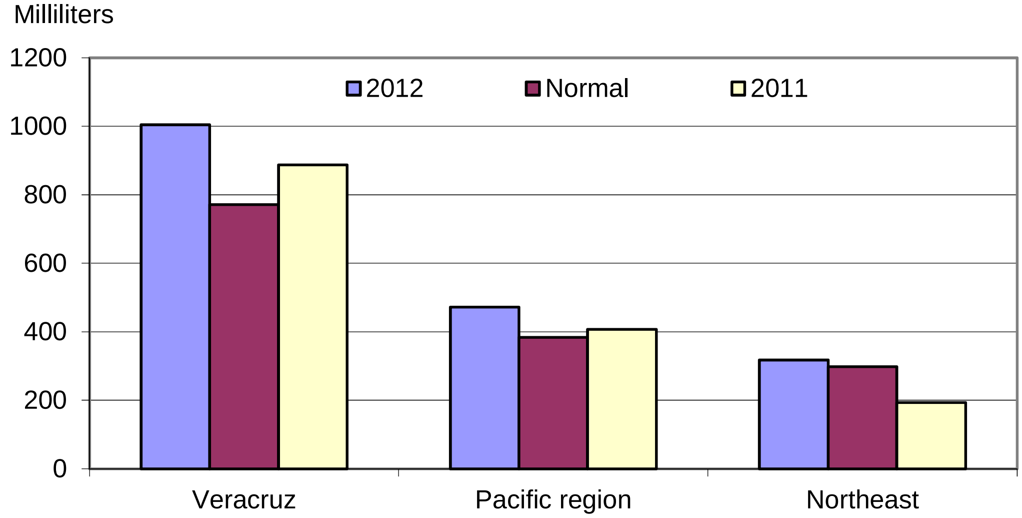
Mexico sugarcane yield: 2012/13 forecast compared with estimated 2010/11 and 2011/12, by region



Source: *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar*, (CNDSCA).

Figure 3

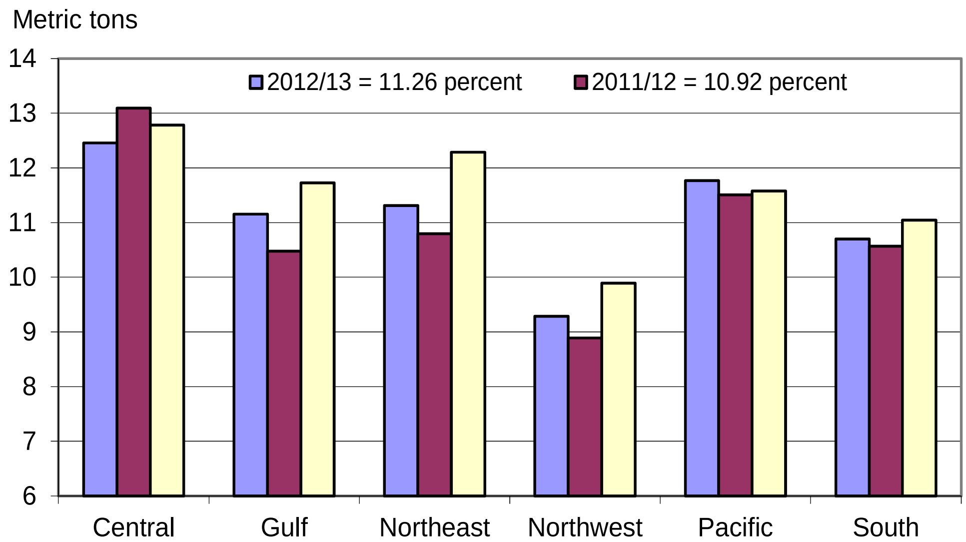
Cumulative precipitation through first week of September 2012 compared with average of 5 preceding years (normal) and 2011



Source: USDA, WAOB, Agricultural Weather Assessments.

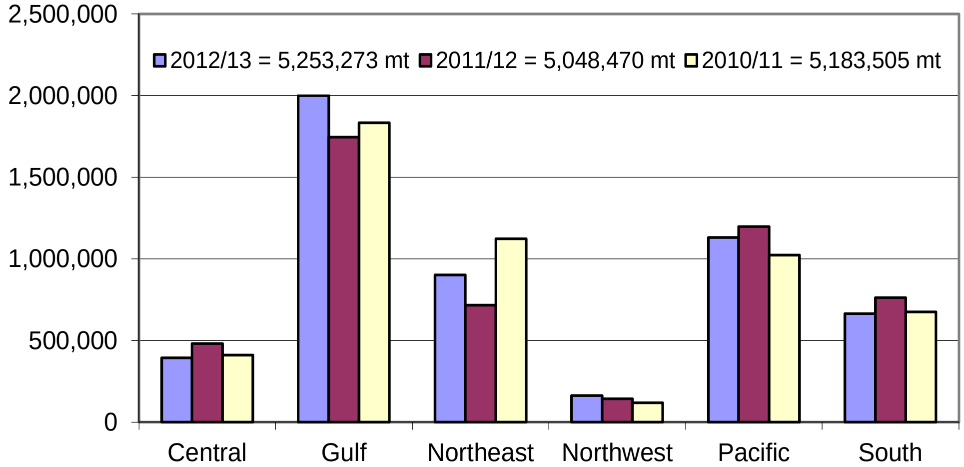
Figure 4

Mexico sugar recovery: 2012/13 forecast compared with estimated 2010/11 and 2011/12, by region



Source: *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar* (CNDSCA).

Figure 5
Mexico sugar production: 2012/13 forecast compared with estimated 2010/11 and 2011/12, by region
Metric tons (mt)



Source: *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar* (CNDSCA).

Figure 5 shows regional sugar production forecasts. Although production levels in the Gulf and Northeast regions are forecast to recover from last year's poor production showing, production in the Northeast is well below the level of 2 years earlier. Except for the low-producing Northwest region, production levels in the other regions are expected to be lower than last year.

U.S. Sugar Tariff-Rate Quota and Overall Allotment Quantity Announcements

The FY 2013 TRQ for raw cane sugar is set at 1,231,497 short tons, raw value (STRV), or 1,117,195 metric tons, raw value (MTRV). This is the minimum to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreement on Agriculture, pursuant to Additional U.S. Note 5 to Chapter 17 of the U.S. Harmonized Tariff Schedule (HTS) and Section 359k of the Agricultural Adjustment Act of 1938, as amended. Raw cane sugar under this quota must be accompanied by a certificate of quota eligibility (CQE) and may be entered under subheadings 1701.13.10 and 1701.14.10 of the HTS until September 30, 2013.

In addition, USDA is establishing the FY 2013 refined sugar TRQ at 129,250 STRV (117,254 MTRV). Of this quantity, 106,825 STRV (96,910 MTRV) is reserved for the importation of specialty sugars as defined by the U.S. Trade Representative (USTR). The total refined sugar TRQ includes the 24,251 STRV (22,000 MTRV) minimum to which the United States is committed under the WTO Uruguay Round Agreement on Agriculture, of which 1,825 STRV (1,656 MTRV) is reserved for specialty sugar.

The FY 2013 specialty sugar TRQ will be opened in five tranches. (Because the specialty sugar TRQ is first-come, first-served, tranches for specialty sugar are needed to allow for orderly marketing throughout the year.) The first tranche, totaling 1,825 STRV (1,656 MTRV), will open on October 12, 2012. All specialty sugars are eligible for entry under this tranche. The second tranche will open on October 26, 2012, and be equal to 38,851 STRV (35,245 MTRV). The remaining tranches will each be equal to 22,050 STRV (22,003 MTRV), with the third opening on January 11, 2013, the fourth on April 11, 2013, and the fifth on July 11, 2013. The second, third, fourth, and fifth tranches will be reserved for organic sugar and other specialty sugars not currently produced commercially in the United States or reasonably available from domestic sources.

Section 359c of the Agricultural Adjustment Act of 1938, as amended, requires that the OAQ be established at not less than 85 percent of the estimated quantity of sugar for domestic human consumption for the fiscal year and that fixed percentages of the OAQ be assigned to the beet sector and cane sector. The OAQ for FY 2013 is being established at the minimum quantity of 9,711,250 STRV. Based on the required beet sector and cane sector percentages of 54.35 and 46.65, respectively, the sugarbeet sector is allotted 5,278,064 STRV and the sugarcane sector is allotted 4,433,186 STRV for FY 2013.

The sugarcane sector allotment is allocated to the sugarcane States according to provisions in the sugar program, as follows: Hawaii--245,499 STRV; Florida--2,250,786 STRV; Louisiana--1,741,236, and Texas--195,665 STRV. Company allocations will be announced in a press release before September 30, 2012.

September 2012 WASDE Report

There were few changes made to the U.S. supply and use estimates/projections. FY 2012 production is still estimated at 8.298 million STRV, comprised of beet sugar at 4.750 million STRV and cane sugar at 3.548 million STRV. Beet sugar production through the end of July has totaled 4.192 million STRV, leaving about 558,000 STRV to be produced in August and September. New crop sugar will have to total between 450,000 to 500,000 STRV in these months to meet the FY 2012 beet sugar estimate. Making this total seems very likely given the early start to sugarbeet harvesting in the Red River Valley, Michigan, and the Great Plains.

Forecast FY 2013 sugar production is unchanged from last month at 8.750 million STRV–5.105 million STRV for beet sugar and 3.645 million STRV for cane sugar. The National Agricultural Statistics Service (NASS) increased its sugarbeet production forecast only 0.7 percent from last month to 35.583 million tons and decreased it sugarcane production forecast 1.1 percent to 31.008 million tons. Most of the sugarcane change was due to a lowering of expected yield in Louisiana from 31 tons per acre last month to 30 tons per acre. Due to heavy cane lodging in the eastern Louisiana cane belt resulting from Hurricane Isaac, 30 percent of the crop was reported in poor to very poor condition in the September 4 NASS Crop Progress. However, in the September 11 Crop Progress, NASS revised this to only 12 percent of the crop. Dry weather during the upcoming harvest season would largely mitigate any lasting effects of the hurricane on the crop.

Changes in the FY 2012 supply and use balance, mostly trade, were made on the basis of pace-to-date (table 2). Estimated raw sugar TRQ shortfall was increased by 168,654 STRV to 240,304 STRV. Many countries that have TRQ allocations diverted their exports to other markets (like the European Union) that were offering better prices than those in the U.S. market. 25,000 STRV of sugar imports from Colombia for calendar year 2012 are now expected to enter after September and therefore will be recorded as entering in FY 2013. Sugar imports from Mexico are estimated at 1.080 million STRV, a reduction of 58,423 STRV from last month. The reduction was made because imports through the end of August are estimated by the Foreign Agricultural Service at 976,700 STRV, making last month’s estimate unlikely to be met. Other changes include an increase of 100,000 STRV in program re-export imports to 650,000 STRV and an increase of 4,000 STRV of high-tier tariff imports to 14,000 STRV. An increase of 25,000 STRV in U.S. sugar exports to 275,000 STRV was offset by a 25,000 STRV reduction in deliveries to food manufacturers participating in the re-export sugar-containing products program.

Ending FY 2012 stocks are estimated at 1.589 STRV, implying a stocks-to-use ratio of 13.5 percent.

Changes in the FY 2013 supply and use forecasts stemmed from lower beginning stocks of 141,000 STRV and increased imports of refined specialty sugar of 105,000 STRV above minimum World Trade Organization requirements.

Table 3 shows all components of FY 2013 U.S. sugar imports. Raw sugar TRQ shortfall is still projected at 165,347 STRV and imports from Mexico are projected at 1.159 million STRV, the same as last month.

For Mexico, 2011/12 exports were reduced by 50,000 mt, reflecting the pace of sugar exports to the U.S. market. 2012/13 production was reduced to 5.250 million mt in line with the first production estimate made by the CNDSCA, discussed earlier in this report.

Table 2 -- USDA estimate of sugar imports in FY 2012

	Metric tons, raw value	Short tons, raw value
Raw sugar TRQ	1,117,195	1,231,497
Less shortfall attributable to Mexico 1/		
Less other shortfall	-218,000	-240,304
Plus FY 2011 TRQ entries in Oct. and Nov. 2011	79,906	88,081
Less FY 2012 TRQ entries in September 2011	-20,062	-22,115
Plus April 2012 increase	381,018	420,000
Total raw sugar TRQ	**1,340,057**	**1,477,159**
Refined sugar TRQ		
Allocation to Canada	12,050	13,283
FY 2011 Canada sugar to enter FY 2012	17,535	19,329
Allocation to Mexico		
Less Mexican shortfall 1/		
Global	8,294	9,143
FY 2011 Global sugar to enter FY 2012	111,078	122,443
Specialty		
Base	1,656	1,825
Additional	90,718	100,000
Total refined sugar TRQ	**241,331**	**266,022**
CAFTA/DR TRQ - calendar 2012	**116,820**	**128,772**
CAFTA/DR FY 2011, likely to enter in FY 2012	31,543	34,770
CAFTA/DR FY 2012, forecast to enter in FY 2013	-20,000	-22,046
Other:		
Singapore, Bahrain, Jordan	22	24
Peru	2,000	2,205
Colombia	50,000	55,116
Colombia CY 2011, entered Oct-Dec 2011	0	0
Colombia CY 2012, forecast to enter Oct-Dec 2012	-25,000	-27,558
Total estimate TRQ entries	**1,736,773**	**1,914,465**
Mexico	**979,896**	**1,080,150**
Re-export program imports	**589,670**	**650,000**
Sugar syrups, high-tier	**12,701**	**14,000**
Total projected imports	**3,319,040**	**3,658,615**

1/ Total entries from Mexico, quota and non-quota, reflected below.
Source: USDA, FAS.

Table 3 -- USDA estimate of sugar imports in FY 2013

	Metric tons, raw value	Short tons, raw value
Raw sugar TRQ	1,117,195	1,231,497
Less shortfall attributable to Mexico 1/		
Less other shortfall	-150,000	-165,347
Additional Quota	0	0
Total raw sugar TRQ	**967,195**	**1,066,150**
Refined sugar TRQ		
Allocation to Canada	12,050	13,283
Global	8,294	9,143
Specialty 1/		
Base	1,656	1,825
Additional	95,254	105,000
Total refined sugar TRQ	**117,254**	**129,250**
CAFTA/DR TRQ - calendar 2013	**121,740**	**134,195**
CAFTA/DR CY 2012, likely to enter in FY 2013	15,000	16,535
CAFTA/DR CY 2013, forecast to enter in FY 2014	-15,000	-16,535
Other:		
Singapore, Bahrain, Jordan	21	23
Peru	2,000	2,205
Colombia	50,750	55,942
Colombia CY 2012, forecast to enter Oct-Dec 2012	25,000	27,558
Colombia CY 2013, forecast to enter Jan-Sept 2013	-25,000	-27,558
Total estimate TRQ entries	**1,258,960**	**1,387,766**
Mexico	**1,051,427**	**1,159,000**
Re-export program imports	**408,233**	**450,000**
Sugar syrups, high-tier	**9,072**	**10,000**
Total projected imports	**2,727,692**	**3,006,766**

1/ The tranches of the FY 2013 specialty sugar TRQ open as follows:

	MTRV	STRV
Tranche 1 - Oct. 12, 2012	1,656	1,825
Tranche 2 - Oct. 26, 2012	35,245	38,851
Tranche 3 - Jan. 11, 2013	20,003	22,050
Tranche 4 - Apr. 11, 2013	20,003	22,050
Tranche 5 - July 11, 2013	20,003	22,050
Total	96,910	106,825

Source: USDA, FAS.

Sugar-Containing Products

The year-over-year increase in sugar in food and beverage imports since FY 2008 has leveled off this year. Table 4 and figure 6 show that sugar in imported products during the first 9 months of FY 2012 is at about the same level as in the corresponding period last year. These imports declined in FY 2008 due to the U.S. economic recession, but began increasing in line with overall economic activity in FY 2009. Sugar in imported beverages and bread-pastry-cake products is up this year but down in the other product categories (fig. 7).

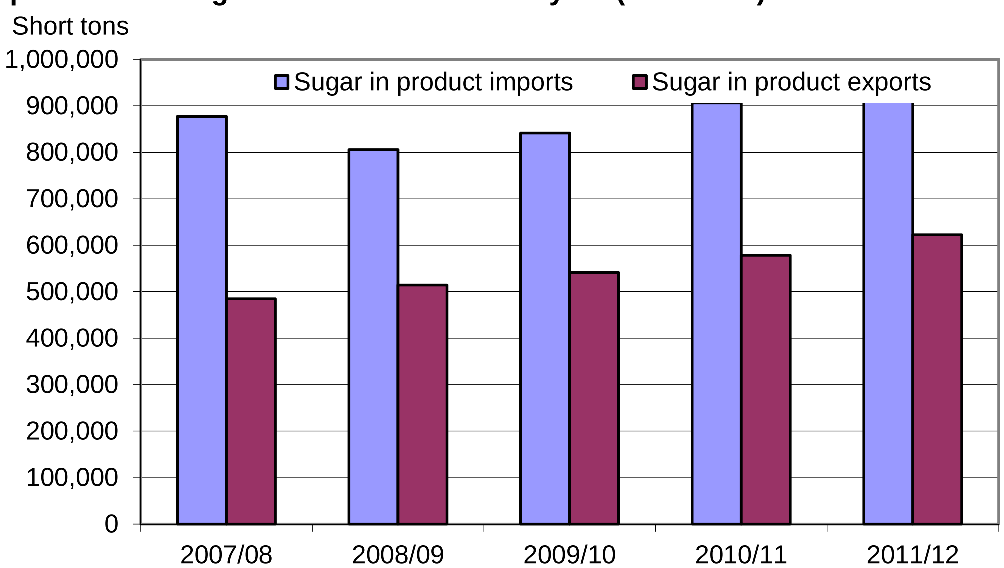
Sugar in exported food products is estimated at 622,193 tons, continuing the upward trend since FY 2008. The FY 2012 9-month export total is 7.5 percent more than last year and 28.4 percent more than in FY 2008. The gap between sugar in imported and exported products is less than 300,000 tons.

Sugar delivered to U.S. food manufacturers under the re-export sugar-containing products program is not a major factor in the export growth. The program sugar is only about 20 percent of the total sugar in products exported over the 5-year period, and the correlation between the program sugar and exported sugar is only 45 percent.

Table 4 -- Sugar in imported sugar-containing products during first 9 months of the fiscal year, 2008/09-2011/12

9-months: Oct.-June	---------- Sugar in product imports ----------						Total sugar in sugar-containing product imports	Total sugar in sugar-containing product exports
	Sugar Confectionery	Cocoa and Cocoa Preparations	Cereal and Bakers Preparations	Bread, Pastry, Cakes, etc.	Misc. Edible Preparations	Carbonated Soft Drinks		
2007/08	305,895	202,860	19,675	114,357	144,378	89,662	876,827	484,604
2008/09	273,669	194,001	12,413	111,290	128,831	85,692	805,896	514,833
2009/10	285,479	200,803	12,188	124,536	131,304	87,289	841,599	540,931
2010/11	292,430	235,115	13,290	133,113	137,665	94,440	906,053	578,519
2011/12	289,717	228,550	11,908	137,527	134,834	108,447	910,983	622,193

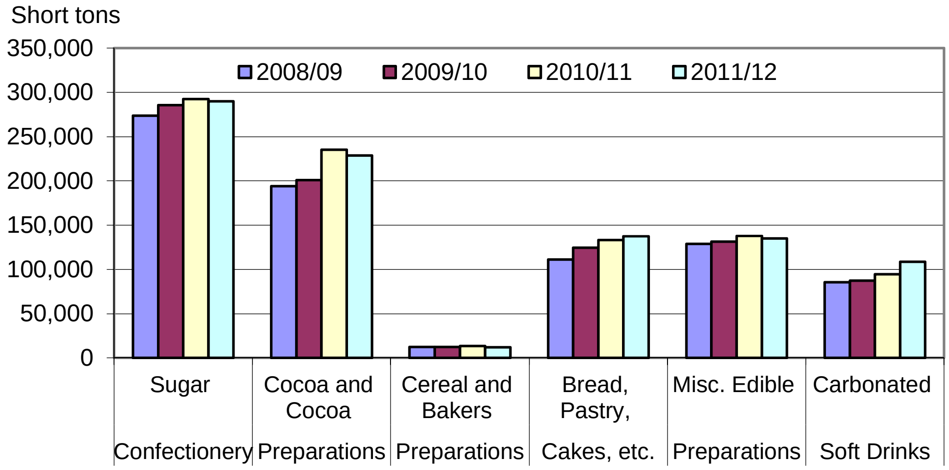
Figure 6
Sugar in imported and exported sugar-containing products during first 9 months of fiscal year (Oct.-June)



Source: ERS, *Sugar and Sweetener Outlook.*

Figure 7

Sugar in imported sugar-containing products during first 9 months of the fiscal year, 2008/09-2011/12, by product category



Source: ERS, *Sugar and Sweetener Outlook.*

Table 5 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.)

Items	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
	1,000 short tons, raw value												
Beginning stocks	2,216	2,180	1,528	1,670	1,897	1,332	1,698	1,799	1,664	1,534	1,498	1,378	1,589
Total production	8,769	7,900	8,426	8,649	7,876	7,399	8,445	8,152	7,531	7,963	7,831	8,298	8,750
Beet sugar	4,680	3,915	4,462	4,692	4,611	4,444	5,008	4,721	4,214	4,575	4,659	4,750	5,105
Cane sugar	4,089	3,985	3,964	3,957	3,265	2,955	3,438	3,431	3,317	3,387	3,172	3,548	3,645
Florida	2,057	1,980	2,129	2,154	1,693	1,367	1,719	1,645	1,577	1,646	1,433	1,828	1,890
Louisiana	1,585	1,580	1,367	1,377	1,157	1,190	1,320	1,446	1,397	1,469	1,411	1,400	1,425
Texas	206	174	191	175	158	175	177	158	152	112	146	150	150
Hawaii	241	251	276	251	258	223	222	182	192	161	182	170	180
Puerto Rico	0	0	0	0	0	0	0	0	0	0			
Total imports	1,590	1,535	1,730	1,750	2,100	3,443	2,080	2,620	3,082	3,320	3,738	3,658	3,007
Tariff-rate quota imports	1,277	1,158	1,210	1,226	1,408	2,588	1,624	1,354	1,370	1,854	1,721	1,914	1,388
Other Program Imports	238	296	488	464	500	349	390	565	308	448	291	650	450
Non-program imports	76	81	32	60	192	506	66	701	1,404	1,017	1,726	1,094	1,169
Mexico							60	694	1,402	807	1,708	1,080	1,159
Total supply	12,575	11,615	11,684	12,070	11,873	12,174	12,223	12,571	12,277	12,817	13,067	13,334	13,346
Total exports	141	137	142	288	259	203	422	203	136	211	248	275	250
Miscellaneous	123	-24	161	23	94	-67	-132	0	0	-45	19	0	0
Deliveries for domestic use	10,132	9,974	9,711	9,862	10,188	10,340	10,135	10,704	10,607	11,152	11,422	11,470	11,635
Transfer to sugar-containing products for exports under reexport program	98	156	183	142	121	106	169	141	120	201	196	140	180
Transfer to polyhydric alcohol, feed	33	33	24	41	48	51	53	61	46	35	33	30	30
Deliveries for domestic food and beverage use 1/	10,000	9,785	9,504	9,678	10,019	10,184	9,913	10,501	10,441	10,917	11,193	11,300	11,425
Total use	10,395	10,087	10,014	10,172	10,542	10,476	10,424	10,907	10,743	11,319	11,689	11,745	11,885
Ending stocks	2,180	1,528	1,670	1,897	1,332	1,698	1,799	1,664	1,534	1,498	1,378	1,589	1,461
Privately owned	1,395	1,316											
CCC	784	212											
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24	11.79	13.53	12.29

1/ For FY 2008-09, combines SMD deliveries for domestic human use, SMD miscellaneous uses, and the difference between SMD imports and WASDE imports.
Source: USDA, WASDE.
NOTE: Numbers may not add due to rounding.

Table 6 -- U.S. sugar: supply and use (including Puerto Rico), fiscal years (Oct./Sept.), metric tons

Items	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
						1,000 metric tons, raw value							
Beginning stocks	2,010	1,977	1,386	1,515	1,721	1,208	1,540	1,632	1,510	1,392	1,359	1,250	1,441
Total production	7,955	7,167	7,644	7,846	7,145	6,712	7,662	7,396	6,832	7,224	7,104	7,527	7,938
Beet sugar	4,245	3,552	4,048	4,257	4,183	4,032	4,543	4,283	3,822	4,151	4,227	4,309	4,631
Cane sugar	3,710	3,615	3,596	3,590	2,962	2,681	3,119	3,113	3,009	3,073	2,877	3,218	3,307
Florida	1,866	1,796	1,932	1,954	1,536	1,240	1,559	1,492	1,431	1,493	1,300	1,658	1,715
Louisiana	1,438	1,433	1,240	1,249	1,049	1,079	1,198	1,312	1,267	1,332	1,280	1,270	1,293
Texas	187	158	173	159	143	159	161	143	138	101	132	136	136
Hawaii	219	227	251	228	234	202	201	165	174	146	165	154	163
Puerto Rico	0	0	0	0	0	0	0	0	0	0	0	0	0
Total imports	1,443	1,393	1,570	1,588	1,905	3,124	1,887	2,377	2,796	3,012	3,391	3,318	2,728
Tariff-rate quota imports	1,158	1,051	1,098	1,113	1,277	2,348	1,473	1,228	1,243	1,682	1,561	1,736	1,259
Other Program Imports	216	269	443	421	454	317	354	513	279	407	264	590	408
Non-program imports	69	73	29	54	174	459	60	636	1,274	923	1,566	992	1,060
Mexico	0	0	0	0	0	0	54	630	1,272	732	1,549	980	1,051
Total supply	11,408	10,537	10,599	10,949	10,771	11,044	11,088	11,404	11,138	11,627	11,854	12,096	12,107
Total exports	128	125	129	261	235	184	383	184	123	191	225	249	227
Miscellaneous	112	-22	146	20	85	-61	-120	0	0	-41	17	0	0
Deliveries for domestic use	9,191	9,048	8,810	8,946	9,243	9,381	9,194	9,710	9,623	10,117	10,362	10,405	10,555
Transfer to sugar-containing products for exports under reexport program	89	141	166	129	110	96	153	128	109	183	178	127	163
Transfer to polyhydric alcohol, feed	30	30	22	38	44	46	48	56	42	31	30	27	27
Deliveries for domestic food and beverage use 1/	9,072	8,877	8,622	8,780	9,089	9,239	8,993	9,527	9,472	9,903	10,154	10,251	10,365
Total use	9,431	9,151	9,084	9,228	9,563	9,504	9,457	9,895	9,746	10,268	10,604	10,655	10,782
Ending stocks	1,977	1,386	1,515	1,721	1,208	1,540	1,632	1,510	1,392	1,359	1,250	1,441	1,325
Privately owned	1,266	1,194	0	0	0	0	0	0	0	0	0	0	
CCC	711	192	0	0	0	0	0	0	0	0	0	0	
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24	11.79	13.53	12.29

1/ For FY 2008-09, combines SMD deliveries for domestic human use, SMD miscellaneous uses, and the difference between SMD imports and WASDE imports.
Source: USDA, WASDE.
NOTE: Numbers may not add due to rounding.

Table 7 -- Mexico: sugar production and supply, and sugar and HFCS utilization

Fiscal Year (Oct/Sept)	2010/11	2011/12 1/	2012/13 1/
	1,000 metric tons, raw value		
Beginning stocks	973	806	925
Production	5,495	5,351	5,565
Imports	307	405	192
Imports for consumption	114	224	0
Imports for other uses (includes IMMEX)	193	181	192
Total supply	6,774	6,562	6,682
Disappearance			
Human consumption	4,187	4,346	4,452
Other deliveries (IMMEX)	310	300	300
Miscellaneous	-86		
Total	4,411	4,646	4,752
Exports	1,558	990	1,062
Exports to the United States & Puerto Rico	1,518	979	1,052
Exports to other countries	40	11	11
Total use	5,969	5,636	5,814
Ending stocks	806	925	868
	1,000 metric tons, actual weight		
Beginning stocks	918	760	873
Production	5,184	5,048	5,250
Imports	289	383	181
Imports for consumption	107	211	0
Imports for other uses (includes IMMEX)	182	171	181
Total Supply	6,391	6,191	6,304
Disappearance			
Human consumption	3,950	4,100	4,200
Other deliveries (IMMEX)	293	283	283
Miscellaneous	-81		
Total	4,161	4,383	4,483
Exports	1,469	934	1,002
Exports to the United States & Puerto Rico	1,432	924	992
Exports to other countries	38	10	10
Total use	5,631	5,318	5,485
Ending stocks	760	873	819
Stocks-to-Human cons. (percent)	19.2	21.3	19.5
Stocks-to-Use (percent)	13.5	16.4	14.9
HFCS cons. (dry weight)	1,635	1,720	1,683

1/ Forecast

Source: USDA, WASDE and ERS, *Sugar and Sweeteners Outlook* .

Contacts and Links

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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/topics/crops/sugar-sweeteners.aspx/. 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/sssm-sugar-and-sweeteners-outlook.aspx
WASDE http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentedID=1194
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