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Sugar and Sweeteners Outlook

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Projected Ending Stocks Raised for 2017/18 Due to Reduced Deliveries and Larger Beginning Stocks

The November *World Agricultural Supply and Demand Estimates* (WASDE) raised projected ending stocks in 2017/18 by 78,000 short tons, raw value (STRV), as higher inventories were reported by processors heading into the year. Projected domestic deliveries for food and beverage use in 2017/18 are reduced 123,000 STRV, as reported deliveries in 2016/17 are estimated at 12.130 million STRV, which is 70,000 STRV lower than the previous month's estimate but still 2.1 percent higher than 2015/16.

Reported ending stocks for 2016/17 by cane and beet processors show that the divergence in market fundamentals between the two sectors in 2015/16 has been greatly alleviated due to market developments over the last year. Large inventories held by beet processors at the beginning of the year were reduced due to record deliveries throughout much of the year, bringing stock levels heading into 2017/18 back in line with historical levels. Cane processors' and refiners' inventory levels remained relatively tight for much of the year, but increased at the end of 2016/17 as imported raw sugar came to the market; the result of policy decisions made by the USDA in July 2017. Price levels for refined cane sugar still hold a premium over refined beet sugar through the end of October, but the difference has narrowed considerably over the past few months.

Mexico sugar markets in 2017/18 are projected to be tight, as beginning stocks are lowered 44,000 metric tons, actual value (MT) from the previous month's projection. Domestic deliveries for human consumption were reported by authorities in Mexico for the full 2016/17 year, raising estimates by 48,000 MT. As a result, projected domestic deliveries for human consumption for 2017/18 are raised 49,000 MT. Lower projected supplies and higher domestic deliveries further constrain the availability of sugar for export. Projected exports for 2017/18 are lowered 81,000 MT, all of which are due to fewer expected shipments to the United States.

Lower domestic deliveries estimated for 2016/17 translate into larger carryover into 2017/18

The November *World Agricultural Supply and Demand Estimates* (WASDE) raised beginning stocks for 2017/18 by 102,000 short tons, raw value (STRV) to 1.834 million STRV based on the first full-year reports for 2016/17 in the Farm Service Agency's (FSA) *Sweetener Market Data* (SMD). Higher carryover into the next year is primarily due to higher-than-expected beet sugar production at the end of the fiscal year and lower-than expected domestic deliveries for food and beverage use.

Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), November 2017

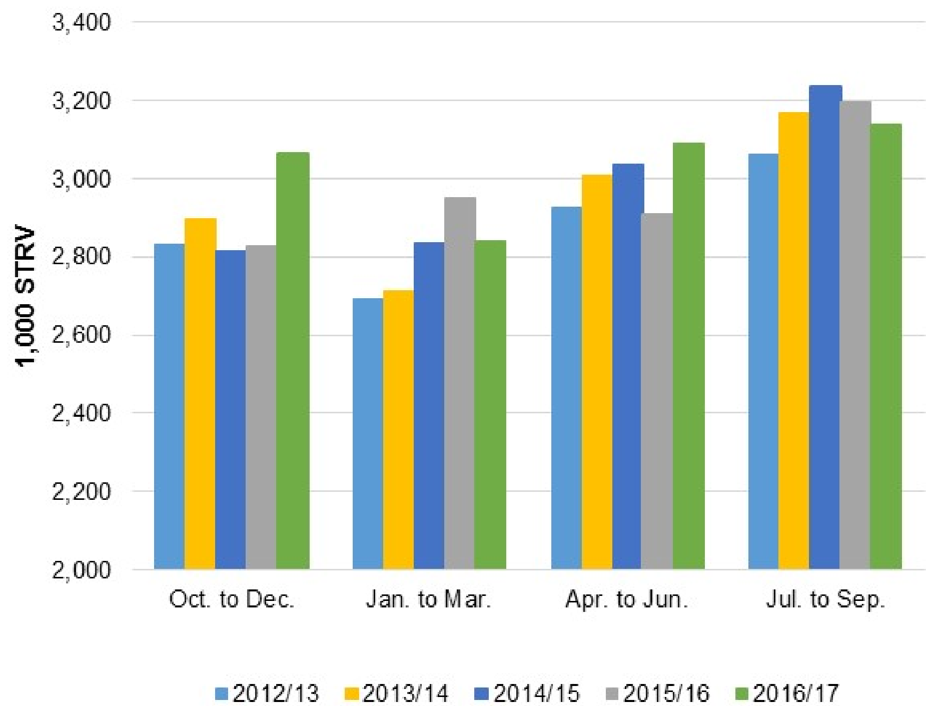
Items	2015/16	2016/17 (estimate)	2017/18 (forecast)	2015/16	2016/17 (estimate)	2017/18 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	1,815	2,054	1,834	1,647	1,863	1,664
Total production	8,989	8,967	8,836	8,155	8,135	8,016
Beet sugar	5,119	5,101	4,950	4,644	4,628	4,491
Cane sugar	3,870	3,866	3,886	3,511	3,507	3,525
Florida	2,173	2,055	2,036	1,971	1,864	1,847
Louisiana	1,428	1,628	1,690	1,296	1,477	1,533
Texas	116	140	160	106	127	145
Hawaii	152	43	0	138	39	0
Total imports	3,341	3,247	3,710	3,031	2,945	3,366
Tariff-rate quota imports	1,620	1,611	1,756	1,469	1,462	1,593
Other program imports	396	419	250	359	380	227
Non-program imports	1,325	1,216	1,704	1,202	1,103	1,546
Mexico	1,309	1,204	1,694	1,187	1,092	1,537
Total supply	14,145	14,268	14,380	12,832	12,944	13,046
Total exports	74	95	50	67	86	45
Miscellaneous	-33	53	0	-30	48	0
Deliveries for domestic use	12,051	12,286	12,555	10,932	11,146	11,390
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	12,130	12,400	10,778	11,004	11,249
Total use	12,091	12,434	12,605	10,969	11,280	11,435
Ending stocks	2,054	1,834	1,775	1,863	1,664	1,611
Private	2,054	1,834	1,775	1,863	1,664	1,611
Commodity Credit Corporation (CCC)	0	0	0	0	0	1
Stocks-to-use ratio	16.99	14.75	14.08	16.99	14.75	14.08

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

Estimated domestic deliveries for food and beverage for 2016/17 are 12.130 million STRV, a reduction of 70,000 STRV, based on SMD reporting. The total represents a 2.1-percent increase over the 2015/16 total. Strong deliveries were primarily driven by the 16.3-percent increase in deliveries from sugarbeet processors. Cane refiners' deliveries were 6.2 percent lower than the record set in 2015/16.

Although the fiscal year totals show relatively strong annual growth compared with 2015/16, total deliveries reported in the July-to-September quarter were relatively low compared with typical seasonal patterns. The period was the largest quarter of the fiscal year—the typical seasonal pattern. However, it was not as large an increase as normally occurs in the period leading up to the holiday season. This could be indicative of the relatively tight inventories reported by cane refiners until the very end of the year, as well as operational and logistical disruptions caused by the hurricane season in August and September. For additional discussion on trends in the cane and beet sugar sectors, see the Special Article later in this report.

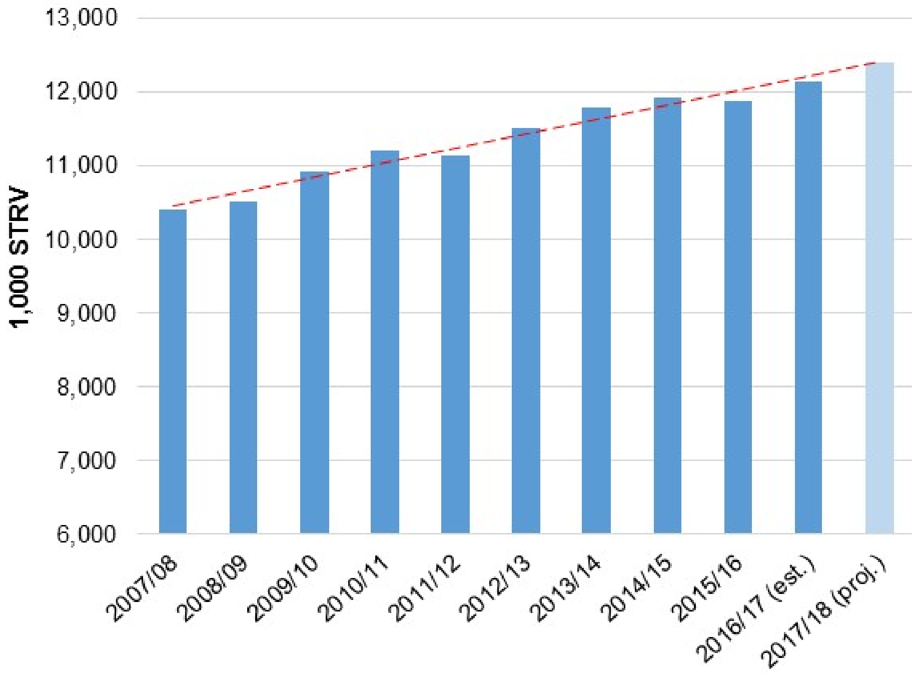
Figure 1
Total U.S. sugar deliveries, quarterly, 20012/13 to 2016/17



Source: U.S. Department of Agriculture, Farm Service Agency.

Deliveries for food and beverage use in 2017/18 are projected to be 12.400 million STRV, a 123,000-STRV decline from the previous month's estimate. The reduction reflects the changes to the 2016/17 estimates. It still represents an annual increase of 2.2 percent, driven by a combination of population growth and the trends of refined sugar accounting for a higher share of total per capita sweetener, which have been occurring since 2007/08. Domestic deliveries for other uses and exports remain unchanged from the previous month's forecast at 155,000 STRV and 50,000 STRV, respectively. Total sugar use in 2017/18 is projected to increase 1.4 percent from 2016/17 estimates.

Figure 2
U.S. sugar deliveries for food and beverage use, fiscal year, 2007/08 to 2017/18



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

Higher sugarbeet crop forecast, strong early-season production, raise beet sugar production

Domestic sugar production in 2017/18 is projected to be 8.836 million STRV, a 27,000-STRV decrease from the October figure. The reduction is due to less beet sugar production projected, at 4.950 million STRV. Beet sugar production in 2016/17 is estimated at 5.101 million STRV, a 79,000-STRV increase. The increase is based on complete fiscal-year production data reported by processors. Beet sugar production in August and September 2017—comprising the early-season production from the 2017/18 crop—totaled 713,000 STRV, including 548,000 STRV in September; both of which are record levels. That National Agricultural Statistics Service (NASS) also increased its forecast for the 2017/18 sugarbeet crop by nearly 1.0 percent to 36.037 million short tons, largely driven by record yields and production forecast for the Red River Valley States of Minnesota and North Dakota. As a result, the total amount of sugar produced from the 2017/18 crop (August-to-July basis) is increased from the previous month's report, but a higher proportion of that production is expected to have occurred in the early-season period. The result is a net decrease in 2017/18 fiscal year production forecasts.

Table 2: Sugarbeet production, 2015/16 to 2017/18, November 2017

State	2015/16	2016/17	2017/18		Annual Change
			October	*November*	
	1,000 short tons				*percent*
Minnesota	12,180	12,510	12,184	12,700	1.5
North Dakota	5,747	6,242	6,365	6,500	4.1
Idaho	6,588	7,038	6,864	6,659	-5.4
Michigan	4,787	4,589	4,004	3,904	-14.9
Nebraska	1,329	1,411	1,432	1,441	2.1
Montana	1,442	1,586	1,428	1,391	-12.3
Wyoming	939	951	878	891	-6.3
Colorado	958	927	1,030	1,036	11.8
California	1,104	1,108	1,066	1,074	-3.1
Oregon	297	428	363	356	-16.8
Wasington	N/A	91	85	85	-6.6
U.S. Total	35,371	36,881	35,699	36,037	-2.3

Source: U.S. Dept. of Agriculture, National Agricultural Statistics Service.

Cane sugar production in 2017/18 is projected to be 3.886 million STRV, unchanged from the previous month's projection. Likewise, cane production projections for each State remain unchanged from the previous month. This would be a 0.5-percent increase compared to the 2016/17 estimate of 3.866 million STRV, which was reduced by 4,000 STRV due to the full fiscal-year data reported for Louisiana.

Imports reduced in 2017/18 due to fewer shipments from extended 2016/17 raw sugar TRQ

Lower projected imports from both quota programs and Mexico reduce total imports for 2017/18 by 120,000 STRV to 3.710 million STRV. Imports under quota programs are lowered 25,000 STRV to 1.756 million STRV. This reduction is due to fewer imports expected under the 2016/17 WTO raw sugar TRQ, which had its entry period extended into the 2017/18 fiscal year by the USDA as part of a number of import program actions taken in July 2017. Shortfall for the 2017/18 WTO raw sugar TRQ is still projected to be 99,000 STRV. Entries under free-trade agreements (FTAs) remain unchanged from the previous month's forecast.

Imports from Mexico are reduced 95,000 STRV to 1.694 million STRV due to constrained supplies in Mexico's balance sheet. The amount remains below the U.S. Needs calculation by the U.S. Department of Commerce (USDOC) of 1.812 million STRV subsequent to the September WASDE, as per the suspension agreements signed by the USDOC and the Government of Mexico. The next calculation by the USDOC for the U.S. Needs and Export Limit will be made subsequent to the December WASDE.

Special Article: Beet and Cane Sugar Inventories Return to Comparable Levels After Divergence in 2015/16

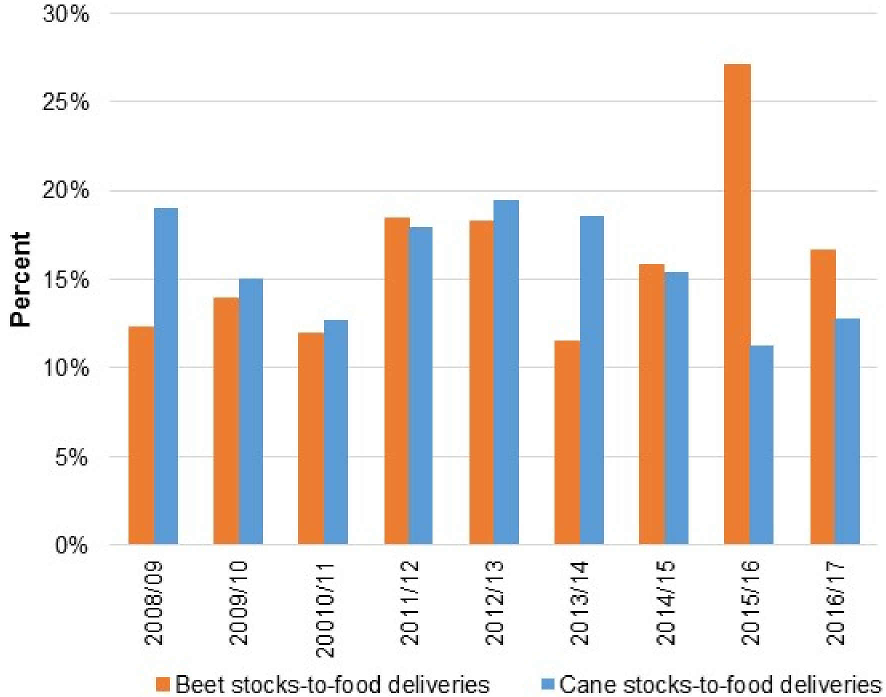
The market fundamentals of the beet sugar and cane sugar sectors returning to the levels of the broader refined sugar market was one of the major developments in the U.S. sugar market in 2016/17. Ending stocks for cane sugar and beet sugar diverged significantly in 2015/16, with extremely tight supplies of cane sugar and ample inventories of beet sugar. This resulted in large price differences in refined cane sugar and refined beet sugar. Several factors contributed to the divergence in 2015/16: consecutive years of strong beet sugar production; steady growth of cane sugar deliveries that drew down cane sugar inventories; and policy-related market uncertainties regarding the suspension agreements with Mexico and Congressional deliberations for domestic legislation on labeling foods with genetically-modified ingredients.

Table 3: Beet and cane sugar supply and use, by fiscal year (Oct./Sept.), November 2017.

	Beet sugar			Cane sugar			Total sugar		
	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17
	1,000 short tons, raw value								
Beginning stocks	553	747	1,244	1,257	1,068	810	1,810	1,815	2,054
Domestic production	4,893	5,119	5,101	3,763	3,870	3,866	8,656	8,989	8,967
Imports 1/	13	10	13	3,540	3,330	3,233	3,553	3,341	3,247
Total supply	5,460	5,877	6,358	8,559	8,268	7,910	14,019	14,145	14,268
Domestic deliveries for consumption	4,730	4,598	5,348	7,191	7,283	6,781	11,921	11,881	12,130
Other deliveries	20	53	37	110	117	119	131	170	156
Exports 2/	1	2	43	184	72	52	185	74	95
Misc.	-39	-20	40	6	-13	14	-33	-33	53
Total use	4,713	4,633	5,468	7,491	7,458	6,966	12,204	12,091	12,434
Ending stocks	747	1,244	891	1,068	810	943	1,815	2,054	1,834
Stocks-to-use ratio	15.85%	26.85%	16.29%	14.26%	10.86%	13.54%	14.87%	16.99%	14.75%

1/ Nearly all imports are counted as cane sugar, except Canada refined imports. It is possible that additional refined sugar imports may be from sugarbeet crops, although this proportion is likely minor. 2/ Estimated based on SMD reporting and intra-industry transactions.
Source: U.S. Dept. of Agriculture, Farm Service Agency, Foreign Agricultural Service, and Economic Research Service.

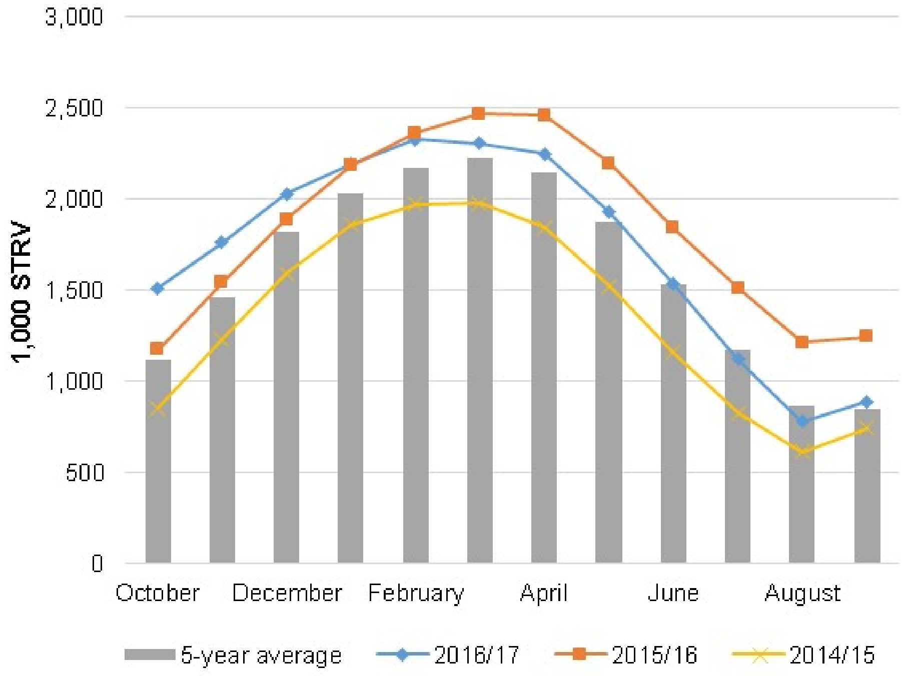
Figure 3
Stocks-to-food use, beet vs. cane deliveries, fiscal year, 2008/09 to 2016/17



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

Record-level beet sugar deliveries in 2016/17 were the most significant market development that contributed to the convergence of the two sectors. At 5.348 million STRV, beet deliveries were 9.3 percent larger than the previous record-fiscal-year total in 2007/08 of 4.894 million STRV. The significant volumes shipped by beet processors allowed them to draw down the substantial inventories, even with relatively strong production levels. Monthly delivery totals began the year at a high pace and remained strong throughout the year, which gradually brought down inventory levels from the high 2015/16 levels. Beet processors' ending inventories of 891,000 STRV are only slightly above the 5-year average, putting inventories at a much more manageable level heading into 2017/18.

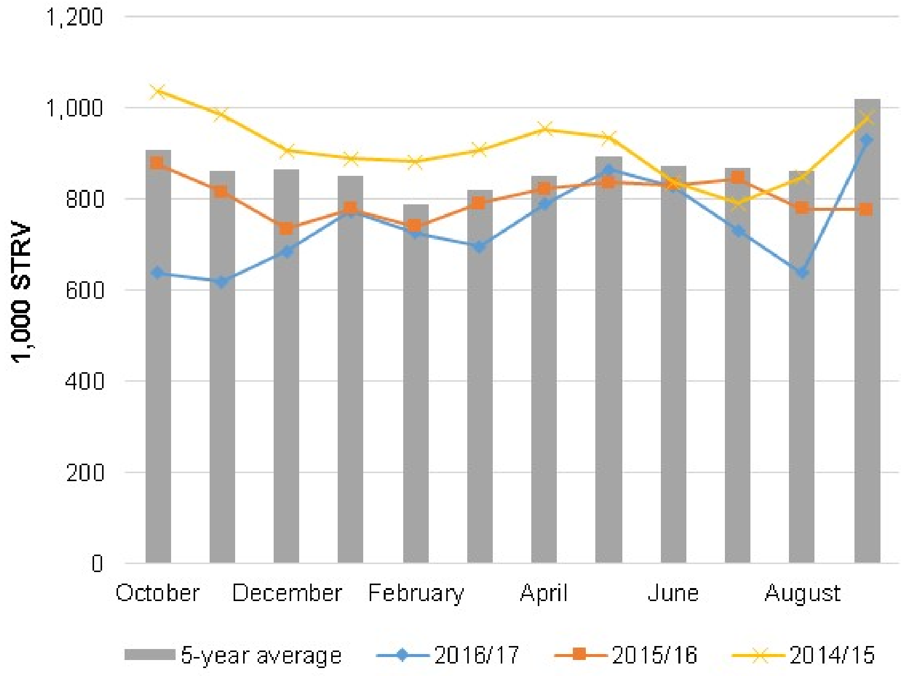
Figure 4
Sugarbeet processors' total sugar inventories, monthly, 2010/11 to 2016/17



Source: U.S. Department of Agriculture, Farm Service Agency.

In contrast, sugar inventories held by cane processors and refiners remained relatively tight for most of 2016/17. It was not until a late buildup of inventories in September that ending stocks became comparable with the 5-year average. The late buildup reflects increased imports of raw sugar due to the USDA's actions in July to reallocate and expand the 2016/17 WTO raw sugar TRQ and the request to the U.S. Department of Commerce to increase the Export Limit for raw sugar supplies from Mexico. As a result, inventories moved from well below year-prior levels through August to the levels reported at the end of September. It is likely that raw sugar inventories will be further buffered by the USDA's allowance of 2016/17 quota imports to enter into the beginning of the 2017/18 fiscal year, as well as by the beginning of the domestic harvest and processing campaign. Available raw and refined cane sugar supplies remained constrained for much of 2016/17, however, which contributed to the year-over-year decline in cane sugar deliveries.

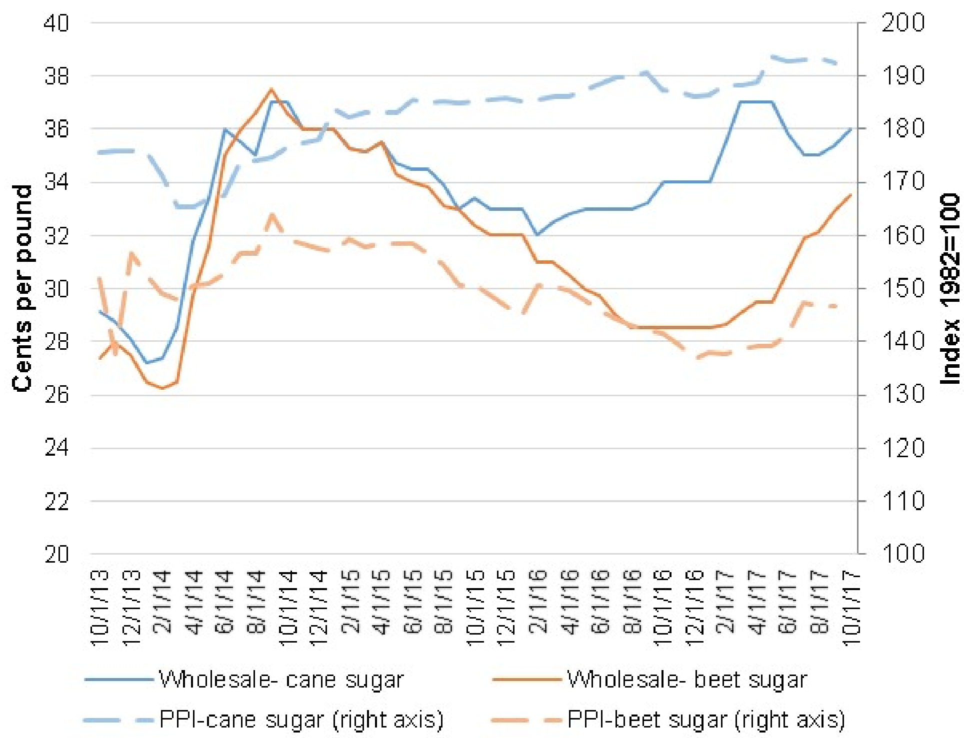
Figure 5
Sugarcane refiners' total sugar inventories, monthly, 2010/11 to 2016/17



Source: U.S. Department of Agriculture, Farm Service Agency.

Prices also played an important role in reconciling the divergences in the cane and beet sugar sectors. Wholesale spot prices of refined cane sugar began the year at a 5.5-cent per pound premium to refined beet sugar. That premium grew to nearly 8 cents by March before narrowing to 2.5 cents by the end of the year. The relative price discount of beet sugar was one of the factors that spurred the large beet deliveries throughout the year. While the price differential narrowed, refined cane sugar prices did finish the year higher than they started, reflecting both the constrained supplies in the cane sugar sector and market fundamentals in the broader U.S. refined sugar market. And while spot prices are not always most reflective of the actual cost of sugar—since most sugar is purchased through longer term contracts and agreements—trends in the Producer Price Index (PPI) show that the divergence between beet sugar and cane sugar costs have at least stabilized from when the divergent trends began in 2014/15.

Figure 6
Refined sugar prices, wholesale and Producer Price Indices, monthly



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

Overall, the conditions of the U.S. refined sugar market heading into 2017/18 are very different than those faced in the previous year. The trends showing a divergence in the market fundamentals driving the beet and cane sectors have subsided. Refined sugar from sugarbeet processors and sugarcane refiners can still be considered substitutable products for the majority of the U.S. sugar buyers. Imbalances and price differentials appear to be related to temporary, policy-related market shocks and uncertainties. As those events have been resolved, patterns of an integrated market have returned. Assuming no additional unexpected shocks, trends in the U.S. sugar market should reflect the performance and relationships that have been historically observed.

Reduction in projected supplies and increased domestic deliveries lower Mexico exports to United States

Total sugar supplies in Mexico for 2017/18 are projected at 7.197 million metric tons, actual value (MT), a 24,000-MT reduction from the previous month's projection. The changes are a result of a 44,000-MT decrease in beginning stocks—due to reported ending stocks by Conadesuca through the end of September—and a 20,000-MT increase in imports. Imports for human consumption in 2017/18 are expected to be in line with current estimates for 2017/18.

Table 4 -- Mexico sugar supply and use, 2015/16 - 2016/17 and projected 2017/18, November 2017

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	6,100
Imports	83	118	95
Imports for consumption	17	48	45
Imports for sugar-containing product exports, IMMEX 1/	66	70	50
Total supply	7,011	7,113	7,197
Disappearance			
Human consumption	4,387	4,515	4,582
For sugar-containing product exports (IMMEX)	390	397	330
Other deliveries and end-of-year statistical adjustment	-10	-16	0
Total	4,767	4,896	4,912
Exports	1,207	1,214	1,460
Exports to the United States & Puerto Rico	1,120	1,030	1,450
Exports to other countries	86	184	10
Total use	5,974	6,110	6,373
Ending stocks	1,037	1,002	825
	1,000 metric tons, raw value		
Beginning stocks	859	1,099	1,062
Production	6,484	6,315	6,466
Imports	88	126	101
Imports for consumption	18	51	48
Imports for sugar-containing product exports (IMMEX)	70	74	53
Total supply	7,431	7,539	7,629
Disappearance			
Human consumption	4,650	4,786	4,857
For sugar-containing product exports (IMMEX)	413	420	350
Other deliveries and end-of-year statistical adjustment	-10	-17	0
Total	5,053	5,190	5,207
Exports	1,279	1,287	1,548
Exports to the United States & Puerto Rico	1,187	1,092	1,537
Exports to other countries	92	195	11
Total use	6,332	6,477	6,755
Ending stocks	1,099	1,062	874
Stocks-to-human consumption (percent)	23.6	22.2	18.0
Stocks-to-use (percent)	17.4	16.4	12.9
High fructose corn syrup (HFCS) consumption (dry weight)	1,482	1,531	1,531

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

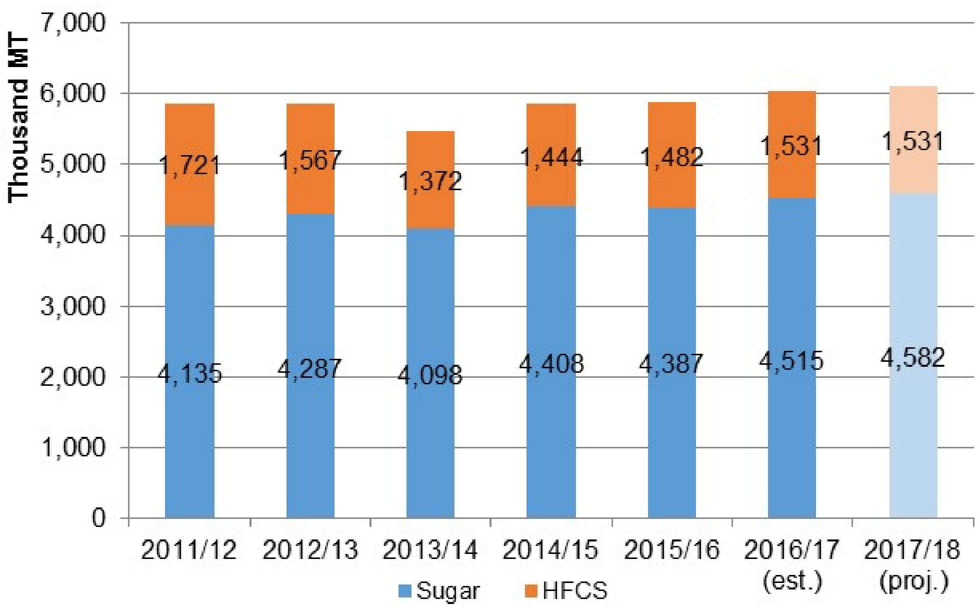
Source: USDA, *World Agricultural Supply and Demand Estimates* and Economic Research Service, Sugar and Sweeteners Outlook; Conadesuca.

Mexico production for 2017/18 is projected to total 6.100 million MT, unchanged from the previous month. Conadesuca released its first production estimate for the 2017/18 at 6.182 million MT. The USDA projection differs from this estimate due to lower harvested area, as Conadesuca's current estimate of 802,000 hectares would represent a record amount. The USDA figure currently assumes harvested area closer to 789,000 hectares, which represents the current high mark reached in 2013/14. Reports on the Mexican sugarcane harvest campaign are expected to be reported beginning in November; which is also the beginning of the harvest in Mexico.

Reported sweetener deliveries in Mexico show robust annual growth for 2016/17, which should carry into 2017/18. Final deliveries for human consumption reported by Conadesuca for 2016/17 totaled 4.515 million MT, a 2.9-percent increase from 2015/16. Additionally, deliveries of high-fructose corn syrup (HFCS) for human consumption was reported at 1.531 million MT, a 3.3-percent increase from the previous year. In total, sweetener deliveries for human consumption increased 3.0 percent compared with 2015/16.

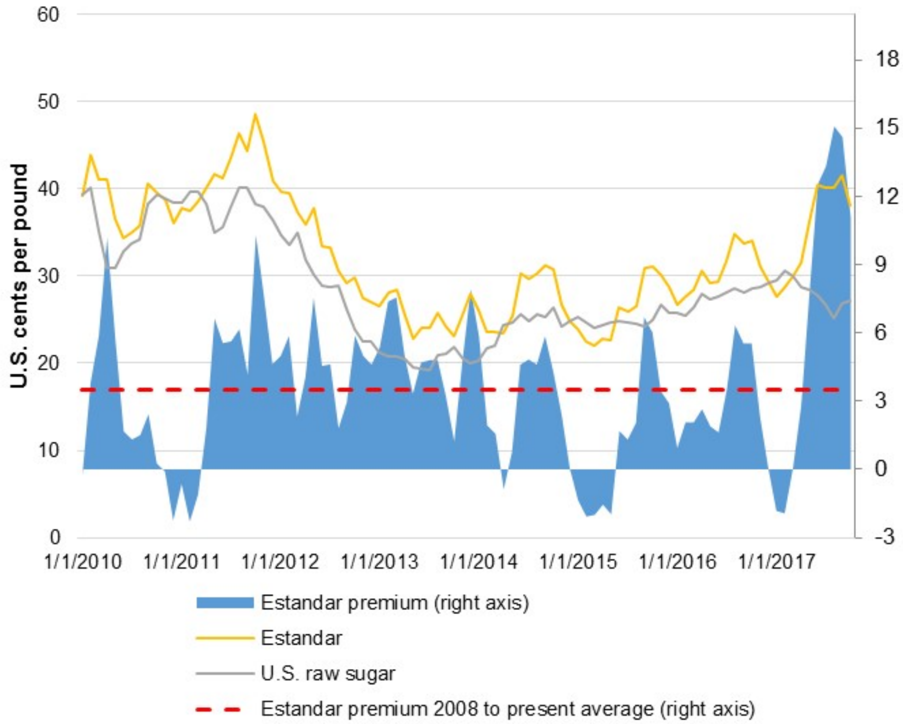
Domestic deliveries for 2017/18 are projected to be 4.582 million MT, a 49,000-MT increase from the previous month's projection. Current projections for 2017/18 are calculated based upon two key assumptions: that per capita sweetener consumption remains unchanged from 2016/17 and that total HFCS deliveries remain level with 2016/17. The increased sugar deliveries reflect the growth in population that increases total sweetener consumption, as well as sugar accounting for a higher share of sweetener consumption. Continued high sugar prices in domestic wholesale markets could be one factor that affects the outlook. The wholesale estandar price in Mexico City averaged 38.14 cents per pound in October, falling below 40 cents for the first time since June. There is still uncertainty regarding the direction of prices in the upcoming months, however. Even with the tight market fundamentals forecast for 2017/18, domestic prices remain well above the U.S. raw sugar price. A premium of that magnitude is typically not sustained over the medium- to long-term.

Figure 7
Mexican sweetener consumption October to September, fiscal year



Source: Conadesuca; U.S. Dept. of Agriculture, World Agricultural Outlook Board.

Figure 8
Mexico City estandar and U.S. raw sugar prices, monthly, January 2010 to October 2017



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

Raised delivery forecasts and lower expected supplies result in a further constraint on supplies available for export. Mexico sugar exports in 2017/18 are projected to be 1.460 million MT, an 81,000-MT reduction from the October forecast. The entirety of the reduction is reflected in projected exports to the United States of 1.450 million MT. The export forecast is related to the projected total for Mexico ending stocks in 2017/18, which is 25,000 MT, or 18.0 percent of projected deliveries for human consumption. This is the level assumed necessary for the Mexico sugar market to bridge the period between the end of the fiscal year and when the harvest campaign gets into gear by late November and December. The raised deliveries projection results in a higher ending stock forecast and, along with the reduced supply outlook, keeps the amount of available supplies for exports below 1.551 million MT; the amount calculated as U.S. Needs by the USDOC based on the September WASDE.

In addition to constraints in total volumes, another market variable that could constrain exports is available supplies within the specifications that define types of sugar within the amended suspension agreements, as agreed in June 2017. Sugar shipped to the United States must have a polarity of less than 99.2 in order to qualify as "other sugar" under the agreement; with higher polarity sugar qualifying as "refined sugar" under the terms. This is lower than Mexican mills typically produce for their domestic market—the specification known as estandar, which has a lower polarity than most U.S. refined sugar but is used for human consumption in Mexico's sweetener market. This polarity is a specification that has not been traditionally produced in large quantities by Mexico mills and does not have the established marketing channels in its domestic market as estandar. The dynamic provides a market variable that also may impact the availability of supplies to be shipped to the United States. Current projections reflect that that supplies will not be constrained by specification, however. This is will be monitored for future reports, as the Mexican harvest and processing campaign provides information on Mexico's available supplies for the year. The suspension agreement does state that the Government of Mexico will inform the USDOC if they will be unable to ship the full amount of the U.S. Needs subsequent to the March WASDE, but prior to March 31.

Conadesuca released its first market forecasts for 2017/18 in October 2017. The agency forecast exports to the United States equal to the Export Limit set by the USDOC from the September WASDE—or 70 percent of the U.S. Needs. Conadesuca also forecasts exports to other countries at 310,000 MT. Overall, the forecasts are for ending stocks to be 988,000 MT, higher than the USDA, due to higher production, fewer domestic deliveries, and fewer exports. The stocks-to-consumption ratio forecast is 22.2 percent, which would match the level reported for 2016/17.

Table 5 -- Mexico sugar supply and use projections, 2017/18, thousand metric tons, actual value

	USDA 1/	Conadesuca 2/
Beginning stocks	1,002	1,002
Production	6,100	6,182
Imports	95	45
Imports for consumption	45	45
Imports for IMMEX 3/	50	--
Total Supply	7,197	7,230
Domestic deliveries	4,912	4,836
Domestic consumption	4,582	4,506
IMMEX deliveries 3/	330	330
Exports	1,460	1,395
Exports to the United States	1,450	1,085
Exports to the rest of world	10	310
Total use	6,373	6,231
Ending Stocks	825	998
Stocks-to-consumption ratio (percent)	18.0	22.2
Stocks-to-use ratio (percent)	12.9	16.0
HFCS Deliveries	1,531	1,532

1/ Released November 9, 2017.

2/ Released October 26, 2017.

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 and Links

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Data

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Related Websites

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