

# Sugar and Sweeteners Outlook

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## U.S. Sugar December 2012

U.S. sugar supply for fiscal year (FY) 2012/13 is projected at 13.816 million short tons, raw value (STRV), a decrease of 265,181 STRV from last month. The decrease is due to lower beginning stocks (1.983 million STRV, lower by 23,635 STRV) and lower imports (2.913 million STRV, lower by 336,546 STRV). These decreases combine to more than offset higher production (8.920 million STRV, increased by 95,000 STRV). The 2012/13 production increase is attributed to higher expected beet sugar production of 5.200 million STRV, increased because of the strong start at the beginning of 2012/13. Projections of imports of sugar under the re-export programs were lowered because of the narrow gap between U.S. and world-traded sugar prices. Exports were projected to decline because of increased competition from Mexican production in supplying the Mexican product re-export program. Imports from Mexico were decreased in line with reduced Mexican supplies from projected reductions in their sugar imports and beginning stocks.

### Contents

- Summary
- World Sugar
- North American Free Trade Area
- Contacts and Links

### Websites

- [WASDE](#)
- [Sugar Topic Room](#)

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The next release is  
January 17, 2013.  
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Approved by the World  
Agricultural Outlook Board.

## World Sugar

On November 20, 2012, the Foreign Agricultural Service (FAS) of the U.S. Department of Agriculture released its latest version of the World Centrifugal Sugar Production, Supply and Distribution (PSD), with updates for the 2010/11, 2011/12, and 2012/13 marketing years (table 1). World sugar surplus, defined as the difference between total production less total consumption (sum of human domestic consumption and other disappearance), is estimated as follows for the corresponding marketing years: 6.249 million metric tons, raw value (MTRV) for 2010/11 (an increase of 1.373 million MTRV from the May 2012 FAS release version); 12.014 million MTRV for 2011/12 (an increase of 2.012 million MTRV from May); and 8.696 million MTRV for 2012/13 (a decrease of 1.996 million MTRV from May). These surpluses for 3 consecutive years follow 2 years of deficits, one of which, 2008/09, was at a record level (fig. 1). The deficit that year was largely unexpected and caused a prolonged spike in world prices. Only now are prices reaching lower levels consistent with world sugar surpluses for the last 2 years and the one projected for this year.

Figure 2 highlights the sources of the differences between surpluses in 2012/13 and 2011/12. The South American surplus gain is largely anchored by increased production in Brazil and steady aggregate disappearance. The major offset (deficit) occurs in Asia and Oceania. While production gains (China, Australia, Pakistan, Indonesia, and the Philippines) are countered by losses (India and Thailand), disappearance increases, especially in the major Indian and Chinese consuming markets. Also significant is the increased deficit for Western Europe, which is largely a result of unfavorable weather causing production in the European Union that was lower than originally expected.

World sugar stocks in 2011/12 and 2012/13 are projected to grow to much higher levels, both with respect to the 3 preceding years and to forecasts made for 2011/12 and 2012/13 in May 2012. 2011/12 world stocks estimated at 36.208 million MTRV are 6.140 million higher than the 2010/11 level, and 2012/13 stocks projected at 38.298 million MTRV are 8.230 million MTRV higher than 2010/12. The corresponding stocks-to-disappearance ratios are 19.3 percent for 2010/11, 22.6 percent for 2011/12, and 23.4 percent for 2012/13 (fig. 3).

The ratios forecast in May were considerably lower for both 2011/12 at 19.6 percent and 2012/13 at 20.2 percent. In terms of volume, world stocks are estimated 4.597 million MTRV higher than in May for 2011/12 and 5.216 million MTRV higher for 2012/13. Stocks are forecast significantly higher in India (for 2011/12), the European Union, and the combined United States and Mexico North American Free Trade Area (NAFTA) market, China, and Thailand in 2012/13.

Sugar developments in important sugar producing and trading countries are detailed below. Materials are sourced from individual country sugar semiannual reports issued by FAS through its Global Agricultural Information Network (GAIN).

### Brazil

Brazil's 2012/13 sugarcane production is forecast at 570 million metric tons (mt), up 5 million mt from the May USDA forecast. Production in Center/South (C/S) Brazil is forecast at 518 million mt, up 18 million mt from May. Steady rainfall during April-June contributed to higher expected yields. Also important for yield was a higher proportion of plant cane, about 20 percent of the total, due to increased plantings. The harvest is expected to end in December, and about 8 million mt may be left in the field for harvest next year. Production in Brazil's Northeast (NE) is projected at 60 million mt. The NE harvest is expected to continue through March 2013.

Table 1 - World sugar production, supply, and distribution

Country mktg year	Beginning stocks	Total sugar production	Total imports	Total supply	Total exports	Total use	Ending stocks
Sugar - North America							
Canada							
2008/09	206	61	962	1,229	58	968	203
2009/10	203	70	1,169	1,442	84	1,158	200
2010/11	200	94	1,256	1,550	49	1,266	235
2011/12	235	130	1,148	1,513	81	1,179	253
2012/13	253	135	1,150	1,538	80	1,210	248
Mexico							
2008/09	1,975	5,260	160	7,395	1,378	5,394	623
2009/10	623	5,115	861	6,599	751	4,875	973
2010/11	973	5,495	306	6,774	1,558	4,410	806
2011/12	806	5,351	505	6,662	985	4,651	1,026
2012/13	1,026	6,008	210	7,244	1,372	4,812	1,060
United States							
2008/09	1,510	6,833	2,796	11,139	123	9,624	1,392
2009/10	1,392	7,224	3,010	11,626	192	10,075	1,359
2010/11	1,359	7,104	3,391	11,854	225	10,379	1,250
2011/12	1,250	7,695	3,294	12,239	244	10,174	1,821
2012/13	1,821	8,006	2,947	12,774	249	10,515	2,010
Total Sugar - North America							
2008/09	3,691	12,154	3,918	19,763	1,559	15,986	2,218
2009/10	2,218	12,409	5,040	19,667	1,027	16,108	2,532
2010/11	2,532	12,693	4,953	20,178	1,832	16,055	2,291
2011/12	2,291	13,176	4,947	20,414	1,310	16,004	3,100
2012/13	3,100	14,149	4,307	21,556	1,701	16,537	3,318
Sugar - Caribbean							
Cuba							
2008/09	135	1,340	24	1,499	727	670	102
2009/10	102	1,250	0	1,352	563	675	114
2010/11	114	1,150	0	1,264	530	675	59
2011/12	59	1,400	0	1,459	670	680	109
2012/13	109	1,420	0	1,529	700	680	149
Dominican Republic							
2008/09	35	510	12	557	217	330	10
2009/10	10	520	70	600	250	332	18
2010/11	18	510	49	577	208	335	34
2011/12	34	553	48	635	212	380	43
2012/13	43	555	48	646	215	380	51
Other Sugar - Caribbean							
2008/09	132	233	452	817	203	478	136
2009/10	136	166	453	755	143	471	141
2010/11	141	186	423	750	151	471	128
2011/12	128	200	435	763	160	480	123
2012/13	123	200	446	769	160	481	128
Total Sugar - Caribbean							
2008/09	302	2,083	488	2,873	1,147	1,478	248
2009/10	248	1,936	523	2,707	956	1,478	273
2010/11	273	1,846	472	2,591	889	1,481	221
2011/12	221	2,153	483	2,857	1,042	1,540	275
2012/13	275	2,175	494	2,944	1,075	1,541	328

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Table 1 - World sugar production, supply, and distribution

- Continued

Country Mktg Year	Beginning stocks	Total sugar production	Total imports	Total supply	Total exports	Total use	Ending stocks
Sugar - Central America							
Guatemala							
2008/09	609	2,381	0	2,990	1,654	744	592
2009/10	592	2,340	0	2,932	1,815	735	382
2010/11	382	2,048	0	2,430	1,544	759	127
2011/12	127	2,402	0	2,529	1,675	759	95
2012/13	95	2,474	0	2,569	1,725	750	94
Other Sugar - Central America							
2008/09	436	2,024	0	2,460	939	1,100	421
2009/10	421	2,185	138	2,744	1,027	1,148	569
2010/11	569	2,120	0	2,689	976	1,146	567
2011/12	567	2,386	0	2,953	1,164	1,229	560
2012/13	560	2,432	0	2,992	1,168	1,262	562
Total Sugar- Central America							
2008/09	1,045	4,405	0	5,450	2,593	1,844	1,013
2009/10	1,013	4,525	138	5,676	2,842	1,883	951
2010/11	951	4,168	0	5,119	2,520	1,905	694
2011/12	694	4,788	0	5,482	2,839	1,988	655
2012/13	655	4,906	0	5,561	2,893	2,012	656
Sugar - South America							
Brazil							
2008/09	215	31,850	0	32,065	21,550	11,650	-1,135
2009/10	-1,135	36,400	0	35,265	24,300	11,800	-835
2010/11	-835	38,350	0	37,515	25,800	12,000	-285
2011/12	-285	36,150	0	35,865	24,650	11,500	-285
2012/13	-285	37,500	0	37,215	25,000	11,700	515
Colombia							
2008/09	170	2,277	138	2,585	584	1,585	416
2009/10	416	2,294	189	2,899	1,019	1,475	405
2010/11	405	2,280	176	2,861	814	1,657	390
2011/12	390	2,310	322	3,022	876	1,771	375
2012/13	375	2,310	330	3,015	875	1,805	335
Argentina							
2008/09	105	2,420	21	2,546	581	1,739	226
2009/10	226	2,230	23	2,479	751	1,740	-12
2010/11	-12	2,030	52	2,070	196	1,790	84
2011/12	84	2,150	3	2,237	172	1,810	255
2012/13	255	2,090	2	2,347	220	1,830	297
Other Sugar - South America							
2008/09	1,231	3,315	1,448	5,994	523	4,049	1,422
2009/10	1,422	2,984	1,720	6,126	494	4,390	1,242
2010/11	1,242	3,287	1,842	6,371	509	4,444	1,418
2011/12	1,418	3,370	1,731	6,519	487	4,529	1,503
2012/13	1,503	3,469	1,569	6,541	509	4,543	1,489
Total Sugar - South America							
2008/09	1,721	39,862	1,607	43,190	23,238	19,023	929
2009/10	929	43,908	1,932	46,769	26,564	19,405	800
2010/11	800	45,947	2,070	48,817	27,319	19,891	1,607
2011/12	1,607	43,980	2,056	47,643	26,185	19,610	1,848
2012/13	1,848	45,369	1,901	49,118	26,604	19,878	2,636

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Table 1 - World sugar production, supply, and distribution

- Continued

Country mktg year	Beginning stocks	Total sugar production	Total imports	Total supply	Total exports	Total use	Ending stocks
Sugar - Western Europe							
EU-27							
2008/09	3,130	14,014	3,180	20,324	1,332	16,760	2,232
2009/10	2,232	16,687	2,561	21,480	2,647	17,400	1,433
2010/11	1,433	15,699	3,755	20,887	1,113	17,800	1,974
2011/12	1,974	18,251	3,800	24,025	2,388	18,000	3,637
2012/13	3,637	16,390	3,850	23,877	1,500	18,000	4,377
Other Sugar - Western Europe							
2008/09	335	275	377	987	45	626	316
2009/10	316	305	378	999	4	633	362
2010/11	362	240	357	959	45	618	296
2011/12	296	250	367	913	50	628	235
2012/13	235	275	388	898	50	633	215
Total Sugar - Western Europe							
2008/09	3,465	14,289	3,557	21,311	1,377	17,386	2,548
2009/10	2,548	16,992	2,939	22,479	2,651	18,033	1,795
2010/11	1,795	15,939	4,112	21,846	1,158	18,418	2,270
2011/12	2,270	18,501	4,167	24,938	2,438	18,628	3,872
2012/13	3,872	16,665	4,238	24,775	1,550	18,633	4,592
Sugar - Eastern Europe							
Russia							
2008/09	550	3,481	2,150	6,181	200	5,500	481
2009/10	481	3,444	2,223	6,148	34	5,715	399
2010/11	399	2,996	2,510	5,905	17	5,538	350
2011/12	350	5,500	750	6,600	300	5,900	400
2012/13	400	4,850	900	6,150	300	5,555	295
Ukraine							
2008/09	580	1,710	78	2,368	37	2,100	231
2009/10	231	1,382	346	1,959	1	1,878	80
2010/11	80	1,540	293	1,913	1	1,860	52
2011/12	52	2,300	48	2,400	33	2,000	367
2012/13	367	2,360	15	2,742	35	2,000	707
Other Sugar - Eastern Europe							
2008/09	756	1,425	1,210	3,391	829	1,857	705
2009/10	705	1,501	1,413	3,619	990	1,894	735
2010/11	735	1,505	1,302	3,542	917	1,905	720
2011/12	720	1,575	1,176	3,471	880	1,913	678
2012/13	678	1,547	1,237	3,462	897	1,934	631
Total Sugar - Eastern Europe							
2008/09	1,886	6,616	3,438	11,940	1,066	9,457	1,417
2009/10	1,417	6,327	3,982	11,726	1,025	9,487	1,214
2010/11	1,214	6,041	4,105	11,360	935	9,303	1,122
2011/12	1,122	9,375	1,974	12,471	1,213	9,813	1,445
2012/13	1,445	8,757	2,152	12,354	1,232	9,489	1,633
Sugar - Africa							
South Africa							
2008/09	227	2,350	168	2,745	1,185	1,530	30
2009/10	30	2,265	200	2,495	830	1,595	70
2010/11	70	1,985	200	2,255	415	1,665	175
2011/12	175	1,885	115	2,175	255	1,705	215
2012/13	215	2,255	130	2,600	500	1,745	355
Other Sugar - Africa							
2008/09	2,508	5,932	6,728	15,168	2,618	10,212	2,338
2009/10	2,338	5,893	7,406	15,637	2,440	10,886	2,311
2010/11	2,311	6,180	7,698	16,189	3,151	10,775	2,263
2011/12	2,263	6,291	7,749	16,303	2,788	11,225	2,290
2012/13	2,290	6,349	7,968	16,607	2,911	11,396	2,300
Total Sugar - Africa							
2008/09	2,735	8,282	6,896	17,913	3,803	11,742	2,368
2009/10	2,368	8,158	7,606	18,132	3,270	12,481	2,381
2010/11	2,381	8,165	7,898	18,444	3,566	12,440	2,438
2011/12	2,438	8,176	7,864	18,478	3,043	12,930	2,505
2012/13	2,505	8,604	8,098	19,207	3,411	13,141	2,655

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Table 1 - World sugar production, supply, and distribution

- Continued

Country mktg year	Beginning stocks	Total sugar production	Total imports	Total supply	Total exports	Total use	Ending stocks
SUG - MiddleEast							
Turkey							
2008/09	405	2,100	5	2,510	5	2,000	505
2009/10	505	2,530	5	3,040	41	2,450	549
2010/11	549	2,274	5	2,828	65	2,300	463
2011/12	463	2,300	5	2,768	70	2,350	348
2012/13	348	2,300	5	2,653	60	2,350	243
Egypt							
2008/09	544	1,612	1,382	3,538	100	2,748	690
2009/10	690	1,820	978	3,488	330	2,629	529
2010/11	529	1,830	1,120	3,479	550	2,800	129
2011/12	129	1,980	1,480	3,589	389	2,850	350
2012/13	350	2,010	1,150	3,510	400	2,950	160
Other Sugar - MiddleEast							
2008/09	2,736	714	7,578	11,028	1,325	8,209	1,494
2009/10	1,494	1,232	8,317	11,043	1,775	7,608	1,660
2010/11	1,660	1,081	7,897	10,638	1,983	6,551	2,104
2011/12	2,104	1,156	8,381	11,641	1,673	7,890	2,078
2012/13	2,078	1,160	8,550	11,788	1,645	8,023	2,120
Total Sugar - MiddleEast							
2008/09	3,685	4,426	8,965	17,076	1,430	12,957	2,689
2009/10	2,689	5,582	9,300	17,571	2,146	12,687	2,738
2010/11	2,738	5,185	9,022	16,945	2,598	11,651	2,696
2011/12	2,696	5,436	9,866	17,998	2,132	13,090	2,776
2012/13	2,776	5,470	9,705	17,951	2,105	13,323	2,523
Sugar - Asia - Oceania							
Japan							
2008/09	454	927	1,279	2,660	1	2,100	559
2009/10	559	901	1,199	2,659	1	2,090	568
2010/11	568	700	1,332	2,600	1	2,070	529
2011/12	529	740	1,225	2,494	1	1,950	543
2012/13	543	770	1,250	2,563	1	2,012	550
India							
2008/09	12,296	15,950	1,358	29,604	224	23,500	5,880
2009/10	5,880	20,637	2,431	28,948	225	22,500	6,223
2010/11	6,223	26,574	405	33,202	3,903	23,000	6,299
2011/12	6,299	28,800	100	35,199	3,499	24,000	7,700
2012/13	7,700	25,630	500	33,830	2,200	25,000	6,630
China							
2008/09	3,965	13,317	1,077	18,359	75	14,500	3,784
2009/10	3,784	11,429	1,535	16,748	93	14,300	2,355
2010/11	2,355	11,199	2,143	15,697	76	14,000	1,621
2011/12	1,621	12,341	4,190	18,152	47	14,500	3,605
2012/13	3,605	14,580	2,000	20,185	44	15,300	4,841
Thailand							
2008/09	2,651	7,200	0	9,851	5,295	2,000	2,556
2009/10	2,556	6,930	7	9,493	4,930	2,220	2,343
2010/11	2,343	9,663	19	12,025	6,642	2,400	2,983
2011/12	2,983	10,235	5	13,223	7,500	2,500	3,223
2012/13	3,223	9,930	5	13,158	7,500	2,600	3,058
Australia							
2008/09	400	4,814	41	5,255	3,522	1,246	487
2009/10	487	4,700	78	5,265	3,600	1,252	413
2010/11	413	3,700	163	4,276	2,750	1,333	193
2011/12	193	3,900	180	4,273	2,850	1,350	73
2012/13	73	4,300	165	4,538	3,100	1,375	63
Pakistan							
2008/09	1,163	3,512	125	4,800	75	4,175	550
2009/10	550	3,420	1,030	5,000	70	4,100	830
2010/11	830	3,920	1,040	5,790	70	4,250	1,470
2011/12	1,470	4,520	0	5,990	350	4,300	1,340
2012/13	1,340	4,670	0	6,010	300	4,400	1,310

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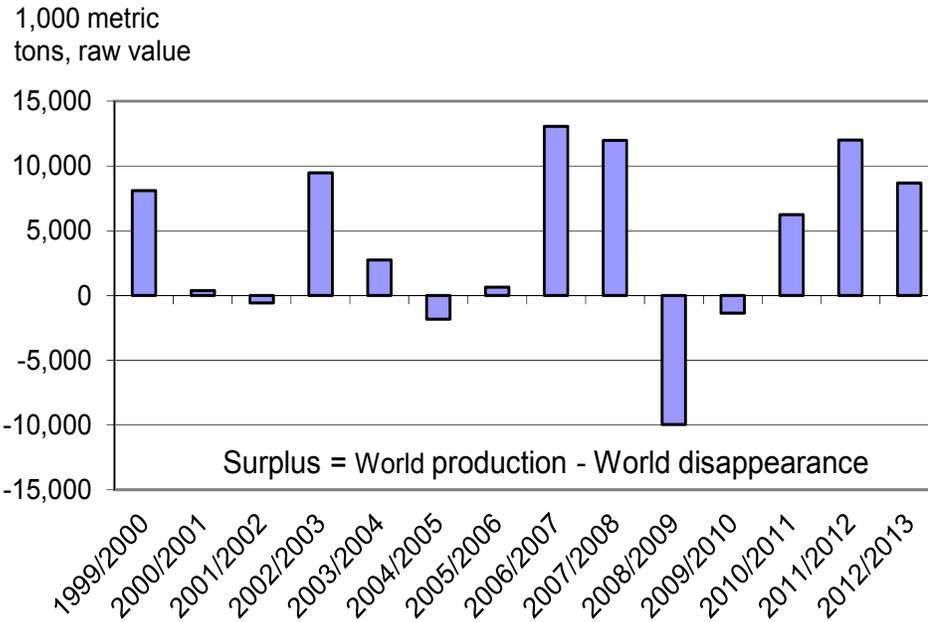
Table 1 - World sugar production, supply, and distribution

- Continued

Country mktg year	Beginning stocks	Total sugar production	Total imports	Total supply	Total exports	Total use	Ending stocks
Indonesia							
2008/09	590	2,053	2,197	4,840	0	4,500	340
2009/10	340	1,910	3,200	5,450	0	4,700	750
2010/11	750	1,770	3,082	5,602	0	5,000	602
2011/12	602	1,830	3,027	5,459	0	5,050	409
2012/13	409	2,040	3,200	5,649	0	5,100	549
Philippines							
2008/09	547	2,100	0	2,647	225	2,100	322
2009/10	322	2,000	250	2,572	178	2,000	394
2010/11	394	2,400	0	2,794	202	2,000	592
2011/12	592	2,240	0	2,832	545	2,000	287
2012/13	287	2,400	0	2,687	300	2,000	387
Other Sugar - Asia - Oceania							
2008/09	2,793	1,898	8,856	13,547	1,059	9,863	2,625
2009/10	2,625	1,753	9,256	13,634	1,042	10,147	2,445
2010/11	2,445	1,852	9,583	13,880	1,124	10,316	2,440
2011/12	2,440	1,957	10,182	14,579	1,146	10,881	2,552
2012/13	2,552	1,895	10,523	14,970	1,128	11,273	2,569
Total Sugar - Asia - Oceania							
2008/09	24,859	51,771	14,933	91,563	10,476	63,984	17,103
2009/10	17,103	53,680	18,986	89,769	10,139	63,309	16,321
2010/11	16,321	61,778	17,767	95,866	14,768	64,369	16,729
2011/12	16,729	66,563	18,909	102,201	15,938	66,531	19,732
2012/13	19,732	66,215	17,643	103,590	14,573	69,060	19,957
World							
World							
2008/09	43,389	143,888	43,802	231,079	46,689	153,857	30,533
2009/10	30,533	153,517	50,446	234,496	50,620	154,871	29,005
2010/11	29,005	161,762	50,399	241,166	55,585	155,513	30,068
2011/12	30,068	172,148	50,266	252,482	56,140	160,134	36,208
2012/13	36,208	172,310	48,538	257,056	55,144	163,614	38,298
Unrecorded							
2008/09	..	..	..	2,887	..	..	..
2009/10	..	..	..	174	..	..	..
2010/11	..	..	..	5,186	..	..	..
2011/12	..	..	..	5,874	..	..	..
2012/13	..	..	..	6,606	..	..	..

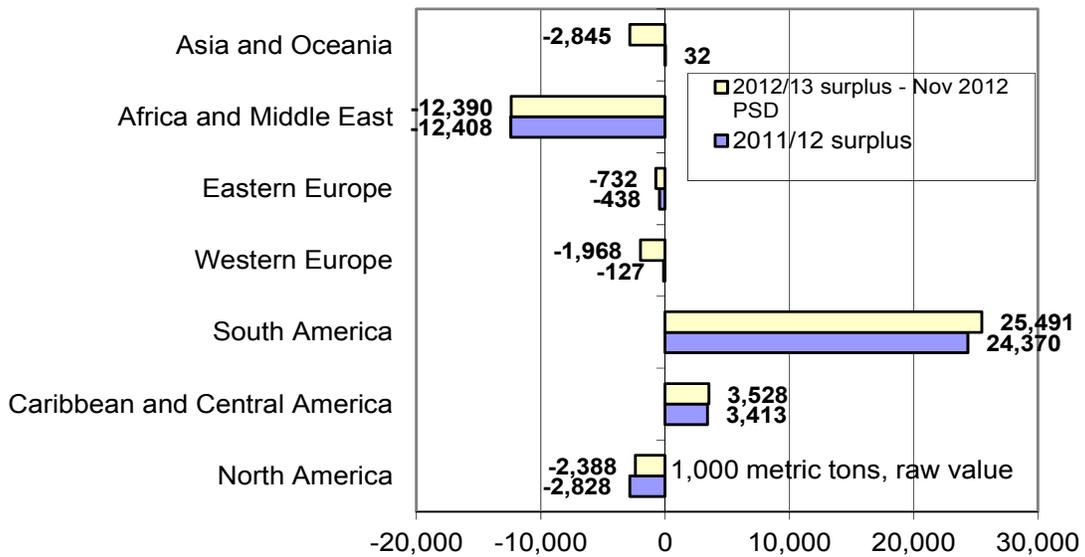
Source: USDA, Foreign Agricultural Service, PSD online.

Figure 1  
**World sugar surplus, 1999/00-2012/13**



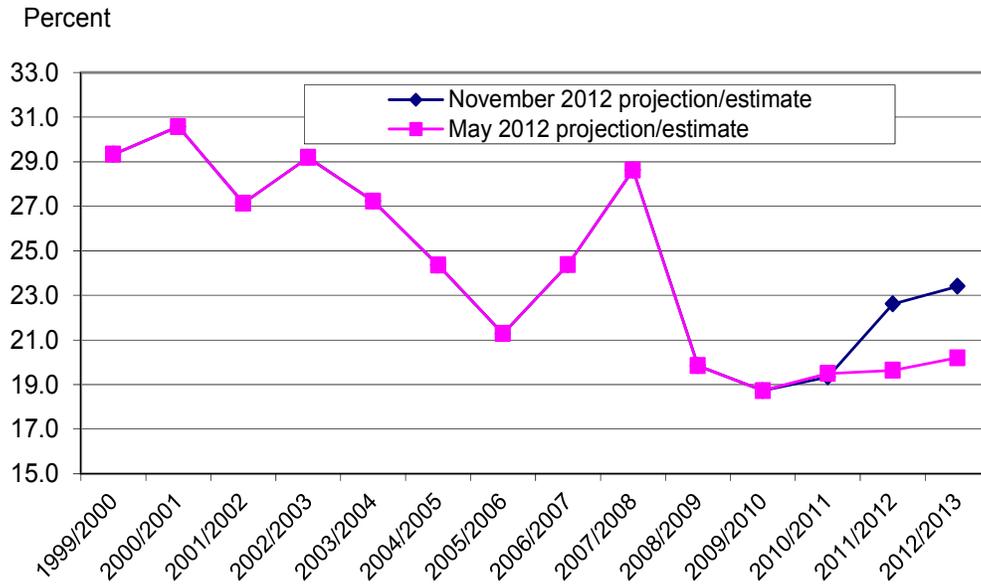
Source: USDA, Foreign Agricultural Service, PSD database (Nov. 2012).

Figure 2  
**USDA forecast of 2012/13 and 2011/12 world sugar surplus, by region**



Source: USDA, Foreign Agricultural Service, PSD database (Nov. 2012).

Figure 3  
**World sugar stocks-to-consumption ratio, 1999/00-2012/13**



Source: USDA, Foreign Agricultural Service, PSD database (Nov. 2012).

Total reducing sugars are forecast at 135 kilograms per cane mt, down about 1.6 kilograms from last year because of the above-average second-quarter rainfall. The split of total reducing sugars between sugar and ethanol is expected to be 49.10 percent sugar and 50.90 percent ethanol. Sugar's share is up from last year's 48.07 percent because of higher expected returns for the sugar export market relative to the domestic ethanol market.

Sugar production is forecast at 37.5 million MTRV, up 1.35 million MTRV from last year. Sugar exports are forecast at 25 million MTRV, split between 19.65 million MTRV of raw sugar and 5.35 million MTRV of refined. Brazil's share of total world sugar exports is projected at 45.3 percent, up from 43.9 percent estimated for 2011/12 but below the 46.9-percent average for 2008/09-2010/11.

Ethanol production is forecast about the same as last year at 22.3 billion liters: 8.9 billion liters for anhydrous ethanol and 13.4 billion liters for hydrous. Ethanol exports are projected to total 2.5 billion liters, about 585 million liters more than last year, with exports to the United States expected to increase as well. Ethanol imports are forecast to decline to 250 million liters as available supply from the United States has decreased. These reduced imports contrast with 2011/12 when imports totaled about 1.4 billion liters.

## **South Africa**

South Africa's 2012/13 sugar production is forecast to recover from the previous 2 years' poor results. Production is forecast at 2.255 million MTRV, up from 1.885 million MTRV in 2011/12 and 1.985 million MTRV in 2010/11. The return of adequate rainfall helped reverse the effects of prolonged drought and associated sugarcane disease problems. Exports are forecast at 500,000 MTRV, a large recovery from 2011/12 exports of only 250,757 MTRV.

Other problems have plagued South African sugar production over the longer term. Area has contracted about 13 percent over the last 10 years. The number of large-scale producers has decreased by about 20 percent and of smaller scale producers by 47 percent. The last 2 years of drought have accelerated the exit of producers. Production is threatened by land reform uncertainty, urbanization, high crime levels, and binding infrastructure constraints.

In response to these problems, the South African Government's Department of Trade and Industry is reviewing the 1978 Sugar Act. The goal of new legislation would be to help establish a more competitive environment for domestic producers, while at the same time providing an enhanced legal framework for Government intervention to counteract distortions in the world sugar market. Growers are reportedly supportive of this type of reform, which would be expected to be in place in time for the 2014/15 season.

## **India**

Indian sugar production for 2012/13 is forecast at 25.63 million MTRV, down from the 2012/13 USDA forecast made in May of 29.75 million MTRV and last year's 28.80 million MTRV. Although area at 5.1 million hectares is forecast at about the same level as last year, low rainfall in the first half of the June-September monsoon—65 percent of normal amounts—led to a 7-percent area reduction in the prime growing States of Maharashtra and Karnataka. Maharashtra has faced acute water shortages since January 2012, affecting forage for cattle and forcing area for sugarcane to be diverted for additional forage. Some sugarcane was directly diverted to cattle feed as well. Compensating somewhat is a 7.5-percent increase in sugarcane area in Uttar Pradesh in the North, due to more normal rainfall during the monsoon period and strong sugarcane prices.

Sugar consumption in 2012/13 is forecast at 25.0 million MTRV, up about 1.0 million MTRV from last year but lower than the 26.5 million MTRV forecast by USDA in May for 2012/13. The Indian Government has acted to allow additional quota sales to moderate higher consumer prices stemming from reduced domestic production.

Sugar exports for 2012/13 are forecast at 2.2 million MTRV, much lower than the 2011/12 estimate of 3.5 million MTRV. Raw sugar imports may rise to 500,000 MTRV due to world raw sugar prices falling below domestic prices

and an appreciation of India's rupee currency. Additional raw sugar imports are expected to help refiners in the production-short States of Maharashtra and Karnataka. Ending year stocks are forecast at 7.0 million MTRV, at the optimal level corresponding to about 3 months of consumption.

## **Pakistan**

Sugarcane production for 2012/13 is forecast at 61.0 million mt, an increase of 9.7 percent over the USDA May forecast and 4.0 percent more than 2011/12. Plentiful rainfall has served to increase yields. The rainfall has also helped to stem the tide of the disease "Sugar Pirella," which would have required chemical treatments that would have reduced yields. Sugar from the crop (and also a small amount from domestically grown sugarbeets) totals 4.65 million MTRV. With consumption projected at 4.4 million MTRV, sugar imports are not expected this year. Sugar exports, mainly to United Arab Emirates, Bangladesh, Iran, Sri Lanka, and Yemen, are expected to total about 300,000 MTRV.

## **Australia**

Sugarcane production in 2012/13 is projected at 31.5 million mt, up 12.5 percent from last year's 28.0 million mt. The crop was aided by early season rainfall and by unharvested sugarcane from the previous year. Sugar production for 2012/13 is projected at 4.3 million MTRV, up from last year's 3.9 million MTRV but down from USDA's May forecast due to lower than expected sugar content in the crop. Exports are projected at 3.1 million MTRV, up from the 2011/12 total of 2.85 million MTRV but still lower than the 10-year average of 3.52 million MTRV.

## **China**

Chinese sugar production for 2012/13 is projected at 14.6 million MTRV, up 18 percent from last year. About 91 percent of this production total is cane sugar, projected at 13.3 million MTRV. Reacting to strong prices, producers switched from alternative crops such as cassava to expand sugarcane area by 3 percent to 1.79 million hectares. Adequate rainfall led to good sugarcane yields, resulting in a sugarcane crop of 130 million mt, 14 percent higher than in 2011/12. Beet sugar production is projected at 1.26 million MTRV from a good sugarbeet crop of 12.3 million mt. Unlike for sugarcane, there are no provincial guidance purchase prices for beet sugar, but strong market prices led producers to expand area by 14.5 percent to 300,000 hectares.

Sugar consumption is projected at 15.3 million MTRV. Higher domestic production is expected to moderate sugar consumer prices, discouraging the trend toward increased consumption of starch-based sugar (e.g., high fructose syrup).

2012 sugar imports are projected at only 1.0 million MTRV, in contrast to the 4.2 million MTRV imported in 2011/12. Part of the World Trade Organization (WTO) tariff-rate quota of 1.95 million MTRV is assigned to State-owned enterprises that are expected to reduce imports to support domestic sugarcane processors.

Ending stocks are projected at 4.3 million MTRV, about 236,000 MTRV higher than beginning stocks. The large growth in stocks occurred in 2011/12 and was augmented by imports entering directly into State reserves. The Chinese Government also intervenes to purchase sugar for stocks to prevent financial losses at sugarcane mills. Purchases of 500,000 MTRV occurred in both March and September 2012. At other times, the Chinese Government releases stocks into the market when consumer prices are high as an aid to maintaining consumption.

In recent years, starch-based sugars have become increasingly competitive with cane- and beet-based sugar in reaction to higher cane and beet sugar prices. According to the China Fermentation Association, 2012 starch-based sugar production has risen 10 percent from 2011 levels. The corresponding annual growth was 36 percent for 2011 and 26 percent for 2010. High fructose syrup (HFS) production in 2012 will amount to 2.36 million mt. About 1.0 million mt of this amount is constituted by HFS-55. Total HFCS production capacity is estimated at 4.5 million mt in 2012, up from 3.5 million mt in 2011.

## **Thailand**

Thailand's sugarcane production for 2012/13 is projected between 95-96 million mt, down about 3 percent from 2011/12. The decrease is attributable to a lack of rain during the June-August plant growing period in all producing regions. Sugar production is expected to be 9.9 million MTRV, down by about the same percentage as the sugarcane. Better weather during the cane ripening stage helped to keep sucrose levels at about the same level as in 2011/12. Exports are expected to decrease about 500,000 MTRV from 2011/12 to 8.5 million MTRV. This forecast is 800,000 MTRV less than the USDA May forecast.

Operations are expected to start at four sugarcane mills that received government licenses in 2010/11, making a total of 51 mills in the country. This is expected to bring total sugarcane crushing capacity up to 1.0 million mt per day from 0.9 million mt. Because of the need for additional sugarcane to serve the mills, growers are supporting a new proposed Thai Government soft-loan program to provide funds for the purchase of cane-harvesting equipment. This program would follow a program covering 2010-12 that provided 2 billion baht (\$66 million) for the same type of purchases. The loan amount for the new program is expected to be about 3 billion baht.

Thai Government involvement in the sugar industry runs deep. The Government sets domestic wholesale and retail prices apart from market conditions. The wholesale price is 19 baht per kilogram, or about 29 cents per pound. (This amount excludes a 7-percent value-added tax that funds producer support and direct payments.) The retail price of white sugar is 21.85 baht per kilogram (33 cents per pound) and 22.85 baht per kilogram (35 cents per pound) for refined sugar. The Government also sets the sugarcane support price, expected to be over 1,000 baht per mt in 2012/13 (about \$32.50 per mt).

## **Russia**

Although Russia's 2012/13 sugarbeet crop is expected to be 11 percent less than last year's crop, expected production at 42.5 million metric tons (mt) is still large compared with earlier years. Sugarbeet returns have remained high, but some planted area was reduced because of last year's shortage of sugarbeet storage facilities and inadequate processing capacity. These conditions led to a high proportion of the previous year's crop being wasted with respect to sugar production. This year also, saw cold weather hampering planting in the South. Dry summer conditions resulted in poorer than expected yields in the same area.

Beet sugar production for 2012/13 is forecast at 4.85 million MTRV, down 11.8 percent from last year's 5.50 million MTRV, but still far above the meager 2.996 million MTRV produced in 2010/11. Because of reduced 2012/13 production, raw sugar imports are expected to increase to 700,000 MTRV, up from last year's 500,000 MTRV. Even so, the high level of production compared with 2010/11 and earlier years, along with white sugar imports from Belarus, keeps raw sugar imports well below the 2.926 million MTRV average for the period 2001/02-2010/11.

## **European Union**

Foreign Agricultural Service reporting normally only covers sugar produced for the European Union (EU) regulated market for food uses. It excludes sugarbeet production for ethanol and other fermentation uses and also out-of-quota sugar for industrial (nonfood) uses. 2012/13 production is forecast at 16.4 million MTRV. This amount includes 290,000 MTRV of cane sugar produced in French overseas territories. Although European sugarbeet area had increased by 20,000 hectares to 1.7 million hectares, production is forecast about 10 percent lower than in 2011/12. Wet and cold conditions in northwestern Europe during the spring and summer, as well as drought conditions in southeastern Europe, decreased overall yields. Sucrose levels, however, were close to normal due to improved weather during the period of sugarbeet maturation.

Contributing to the production total is 900,000 MTRV of unsold out-of-quota sugar for industrial use from 2011/12 that is carried over into 2012/13. It is counted against 2012/13 production quotas and is available for food use.

EU sugar imports have a detailed and complicated structure, covering agreements with former colonies, preferential access to Balkan countries, and pre-existing quotas that accompanied new member States when they joined the EU. The last couple of years have seen extraordinary sugar import tenders at reduced duty levels to supply EU sugar refineries with raw sugar. Overall, sugar imports for 2012/13 are projected at 3.9 million MTRV. This total could rise by an additional 264,000 MTRV if certain Free Trade Agreements with Colombia, Peru, and other Central American countries are ratified during the year. EU refined sugar exports are projected at 1.5 million MTRV, a maximum amount bound by the World Trade Organization (WTO). (These exports in 2011/12, at 2.4 million MTRV, exceeded the maximum because the EU dubiously claimed unused quantities from the previous 2010/11 WTO notification year.)

2011/12 ending stocks (beginning stocks for 2012/13) are estimated at 3.6 million MTRV, an increase of 1.663 million MTRV over the previous year. These stocks include the 900,000 MTRV of unsold out-of-quota carried-over from 2011/12. Other factors contributing to the buildup included out-of-quota releases into the domestic food market and exceptional sugar import tenders during 2011/12. Ending stocks for 2012/13 are forecast at 4.4 million MTRV, with 2012/13 production and imports outweighing expected consumption of 18.0 million MTRV and WTO-constrained exports.

## **Sugar and Sweeteners in the North American Free Trade Area**

On December 11, 2012, the U.S. Department of Agriculture (USDA) published in the *World Agricultural Supply and Demand Estimates* (WASDE), its latest sugar supply and use estimates/projections for the United States and Mexico.

For fiscal year (FY) 2012, the USDA made certain revisions based on updates to the Farm Service Agency's *Sweetener Market Data* (SMD). Production was increased by 4,200 short tons, raw value (STRV) based on a larger estimate of beet sugar production (4.899 million STRV, up 4,900 STRV) and a small reduction to Louisiana cane sugar production. Ending stocks were reduced by 23,635 STRV to 1.983 million STRV, based on revisions made by a cane sugar refiner.

For FY 2013, the USDA increased its projection of beet sugar production by 95,000 STRV to 5.200 million STRV. This increase was made on the basis of the strong start to the 2012/13 beet sugar production cycle, along with supporting sugarbeet production data published by the National Agricultural Statistics Service (NASS) last month. The forecast assumes that production next September from the 2013/14 sugarbeet crop will be close to historical norms.

The USDA reduced its projection of imports for USDA's re-export programs by half to 225,000 STRV. Margins between the U.S. raw sugar price (the nearby Intercontinental Exchange (ICE) No. 16 Contract) and the world raw sugar price (nearby ICE No. 11 Contract) have averaged only between 3.0–3.5 cents per pound for the past 2-1/2 months. The incentive to import is essentially stalled until the margins widen to more normal levels. All else constant, the narrow margin would be expected to encourage refiners to use domestic sugar for increased exports, obtain export credits issued by the Foreign Agricultural Service (FAS) under USDA's re-export program, and then use those credits to import world-priced sugar when the U.S.-world sugar margins increase later on. The expectation would be that low per unit losses on current exports could be more than covered by future purchases of world-priced raw sugar and resale of the refined product into the domestic market. Currently low interest rates only make this type of transaction more attractive.

The USDA projects lower sugar imports from Mexico. These imports are projected to fall by 112,000 STRV to 1.388 million STRV. With Mexico's large projected sugar production, it is expected that processors will deliver more of their domestic production into Mexico's sugar-containing re-export product program (IMMEX). Lower returns from export sales to the U.S. market highlight transport cost advantages of delivering the sugar to domestic sweetener-product manufacturers who participate in the IMMEX program and export their product, mainly to the United States.

The USDA reduced its projection of sugar exports by 100,000 STRV to 175,000 STRV. Because most U.S. refined sugar exports are destined for Mexican sweetener product manufacturers under IMMEX, these exports are projected to be displaced by deliveries of Mexican-produced sugar, as outlined above. Basic to this scenario is that overall IMMEX demand for sugar is about 340,000 metric tons. Also, in aggregate U.S. cane refiners have negative license account balances that lessen the requirement to export in the near term, which the program would require if those balances were positive.

As mentioned earlier, narrow margins between U.S. and world sugar prices would be expected to encourage more exports so that export credits could be accumulated for future use when margins widen. The problem is that the market for U.S.-sourced sugar is limited. Almost all refined sugar importers outside of North America cannot accept U.S. sugar that is shipped either in bulk or in 50-pound bags. The international norm is 50-kilogram bags that U.S. refiners are not set up to provide. Therefore, the ability to transfer export sugar displaced from Mexico is limited. Price competition with Mexican producers for IMMEX share would only make those exports less remunerative, both presently and for future re-export imports when margins have widened.

The USDA made no other changes to sugar use. SMD October sugar deliveries of 1.035 million STRV were in line with USDA expectations.

The USDA projects ending year stocks as the difference between total supply and total use at 2.051 million STRV. This stocks level implies an ending stocks-to-use ratio of 17.4 percent, down from last month's 18.7 percent.

For Mexico, the USDA reduced its projection of imports by 85,585 metric tons to 112,417 metric tons. This reduction matches the U.S. export reduction. The *Comite Nacional Para El Desarrollo Sustentable de la Caña de Azucar* (Conadesuca) expects that 22,601 metric tons of these imports will be for consumption. Although not part of the WASDE accounting, the Economic Research Service supply and use table incorporates the Conadesuca import partition. The USDA reduced its projection of beginning stocks in Mexico to 957,809 metric tons based on the Conadesuca revision to its data.

The USDA projects that the supply reductions will flow through to a reduction in exports, keeping ending stocks the same as last month at 1.000 million metric tons. Both the U.S. and Mexican supplies are assumed to remain in approximate oversupply status. Exports are, therefore, projected at 1.198 million mt. All but 10,000 metric tons are assumed to go to the U.S. market.<sup>1</sup>

<sup>1</sup> Table 2 in the November 2012 *Sugar and Sweetener Outlook* had an error that is corrected in this issue. Table 2 on page 7 reported the same continuation table data that was on page 8 – the first part of the table was missing. In this report, the correct data is reported as table 3.

Table 2 -- Mexico: sugar production and supply, and sugar and HFCS utilization

Fiscal Year (Oct./Sept.)	2010/11	2011/12	2012/13 1/
		1,000 metric tons, actual weight	
Beginning Stocks	918	760	958
Production	5,184	5,048	5,668
Imports	289	476	112
Imports for consumption	107	237	23
Imports for sugar-containing product exports (IMMEX) 2/	182	240	90
Total Supply	6,391	6,285	6,738
Disappearance			
Human consumption	3,950	4,135	4,200
For sugar-containing product exports (IMMEX)	293	344	340
Miscellaneous	-81	-82	
Total	4,161	4,398	4,540
Exports	1,469	929	1,198
Exports to the United States & Puerto Rico	1,432	919	1,188
Exports to other countries	38	10	10
Total Use	5,631	5,317	5,738
Ending Stocks	760	958	1,000
		1,000 metric tons, raw value	
Beginning Stocks	973	806	1,015
Production	5,495	5,351	6,008
Imports	307	505	210
Imports for consumption	114	251	24
Imports for sugar-containing product exports (IMMEX)	193	254	95
Total supply	6,774	6,662	7,233
Disappearance			
Human consumption	4,187	4,384	4,452
For sugar-containing product exports (IMMEX)	310	365	360
Miscellaneous	-86	-86	
Total	4,411	4,662	4,812
Exports	1,558	985	1,270
Exports to the United States & Puerto Rico	1,518	974	1,260
Exports to other countries	40	11	11
Total use	5,969	5,647	6,083
Ending stocks	806	1,015	1,060
Stocks-to-Human Consumption (percent)	19.2	23.2	23.8
Stocks-to-Use (percent)	13.5	18.0	17.4
High Fructose Corn Syrup (HFCS) Consumption (dry weight)	1,635	1,721	1,635

1/ Forecast.

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

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

Table 3 -- Mexico sugarcane, area harvested, sugar, by region, 2003/04-2011/12 and projected 2012/13

Region		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
<b>Central</b>											
Cane harvested	Tons	3,026,327	3,229,706	2,912,213	3,245,105	3,194,736	3,011,639	3,109,317	3,216,196	3,676,224	3,794,315
Area harvested	Has.	26,589	27,665	27,899	29,659	29,324	28,946	28,231	30,795	31,602	34,528
Sugar production	Tons	360,356	393,861	358,899	399,244	402,583	379,756	386,309	411,041	481,783	490,783
Refinado	Tons	163,834	135,740	127,668	121,413	0	0	0	0	0	0
Estandar	Tons	196,522	258,121	231,231	277,831	402,583	379,756	386,309	411,041	481,420	490,783
Other	Tons	0	0	0	0	0	0	0	0	0	0
Sucrose recovery	Percent	11.91	12.19	12.32	12.30	12.60	12.61	12.42	12.78	13.35	12.93
Cane yield	Tn/Ha.	113.82	116.74	104.39	109.41	108.95	104.04	110.14	104.44	116.33	109.89
Sugar yield	Tn/ha	13.55	14.24	12.86	13.46	13.73	13.12	13.68	13.35	15.53	14.21
<b>Gulf</b>											
Cane harvested	Tons	17,759,294	20,269,579	18,707,864	19,302,127	18,749,219	15,466,962	16,762,064	15,646,792	16,669,325	19,063,538
Area harvested	Has.	258,256	272,143	272,332	282,538	285,346	269,539	272,335	274,485	281,492	294,455
Sugar production	Tons	1,978,663	2,290,966	2,100,380	2,077,359	2,092,869	1,798,622	1,802,381	1,834,977	1,746,091	2,124,563
Refinado	Tons	848,973	1,036,836	875,373	927,629	933,947	844,042	889,132	871,414	830,203	984,285
Estandar	Tons	1,129,107	1,253,255	1,206,551	1,147,968	1,146,448	915,273	912,446	918,215	897,639	1,140,278
Other	Tons	583	875	18,456	1,762	12,474	39,306	804	45,351	18,248	0
Sucrose recovery	Percent	11.14	11.30	11.23	10.76	11.16	11.63	10.75	11.73	10.47	11.14
Cane yield	Tn/Ha.	68.77	74.48	68.70	68.32	65.71	57.38	61.55	57.00	59.22	64.74
Sugar yield	Tn/ha	7.66	8.42	7.71	7.35	7.33	6.67	6.62	6.69	6.20	7.22
<b>Northeast</b>											
Cane harvested	Tons	7,253,412	9,542,032	8,282,055	7,532,287	8,915,731	7,707,869	6,422,780	9,140,820	6,649,561	8,275,994
Area harvested	Has.	104,662	127,991	126,482	121,914	125,489	128,997	122,284	134,331	131,753	134,196
Sugar production	Tons	772,141	1,070,114	950,967	794,523	1,043,359	908,832	696,051	1,122,889	717,721	942,129
Refinado	Tons	360,727	329,146	390,431	297,882	314,912	398,370	300,023	475,673	305,641	526,830
Estandar	Tons	411,414	740,968	560,536	496,641	728,447	510,461	396,028	643,936	412,079	415,299
Other	Tons	0	0	0	0	0	0	0	3,280	0	0
Sucrose recovery	Percent	10.65	11.21	11.48	10.55	11.70	11.79	10.84	12.28	10.79	11.38
Cane yield	Tn/Ha.	69.30	74.55	65.48	61.78	71.05	59.75	52.52	68.05	50.47	61.67
Sugar yield	Tn/ha	7.38	8.36	7.52	6.52	8.31	7.05	5.69	8.36	5.45	7.02
<b>Northwest</b>											
Cane harvested	Tons	1,769,732	1,257,460	1,882,054	2,488,029	2,140,474	1,774,361	954,571	1,194,424	1,613,186	1,624,056
Area harvested	Has.	23,246	22,688	20,928	24,156	24,910	21,527	14,437	15,228	20,178	20,609
Sugar production	Tons	163,684	112,623	178,260	222,983	199,404	164,786	92,475	118,142	143,384	153,151
Refinado	Tons	86,425	48,127	96,410	106,614	98,585	66,163	22,316	35,326	46,443	59,317
Estandar	Tons	77,259	64,496	81,851	116,369	100,819	98,623	70,159	82,816	96,941	93,834
Other	Tons	0	0	0	0	0	0	0	0	0	0
Sucrose recovery	Percent	9.25	8.96	9.47	8.96	9.32	9.29	9.69	9.89	8.89	9.43
Cane yield	Tn/Ha.	76.13	55.42	89.93	103.00	85.93	82.43	66.12	78.44	79.95	78.80
Sugar yield	Tn/ha	7.04	4.96	8.52	9.23	8.00	7.65	6.41	7.76	7.11	7.43

- continued

Table 3 -- Mexico sugarcane, area harvested, sugar, by region, 2003/04-2011/12 and projected 2012/13 - continued

Region		2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
<b>Pacific</b>											
Cane harvested	Tons	9,491,642	10,232,129	9,163,852	10,053,313	9,628,431	8,887,714	9,890,549	8,827,922	10,407,966	10,198,322
Area harvested	Has.	110,209	113,635	117,895	119,572	119,248	115,718	113,413	113,296	127,348	126,929
Sugar production	Tons	1,114,910	1,237,508	1,030,471	1,166,484	1,166,888	1,064,392	1,168,930	1,022,131	1,197,322	1,203,480
Refinado	Tons	287,732	342,695	293,654	318,871	290,831	281,710	297,022	266,634	308,485	311,775
Estandar	Tons	827,178	894,813	736,817	847,613	876,057	782,682	871,886	592,145	689,009	663,536
Other	Tons	0	0	0	0	0	0	0	163,352	199,830	228,170
Sucrose recovery	Percent	11.75	12.09	11.24	11.60	12.12	11.98	11.82	11.58	11.50	11.80
Cane yield	Tn/Ha.	86.12	90.04	77.73	84.08	80.74	76.81	87.21	77.92	81.73	80.35
Sugar yield	Tn/ha	10.12	10.89	8.74	9.76	9.79	9.20	10.31	9.02	9.40	9.48
<b>South</b>											
Cane harvested	Tons	6,161,435	6,361,737	6,342,370	6,404,263	5,776,882	5,678,293	6,229,105	6,105,416	7,214,967	6,902,308
Area harvested	Has.	89,392	92,293	93,493	96,855	98,688	97,973	96,876	102,533	111,392	108,888
Sugar production	Tons	634,322	691,367	663,111	653,491	615,587	646,108	679,415	674,319	762,532	753,954
Refinado	Tons	76,551	65,407	47,370	72,453	63,837	80,269	94,300	59,376	74,244	88,667
Estandar	Tons	557,771	625,960	615,741	581,038	551,750	565,838	585,114	594,079	659,883	592,502
Other	Tons	0	0	0	0	0	0	0	20,864	28,405	72,785
Sucrose recovery	Percent	10.30	10.87	10.46	10.20	10.66	11.38	10.91	11.04	10.57	10.92
Cane yield	Tn/Ha.	68.93	68.93	67.84	66.12	58.54	57.96	64.30	59.55	64.77	63.39
Sugar yield	Tn/ha	7.10	7.49	7.09	6.75	6.24	6.59	7.01	6.58	6.85	6.92
<b>Mexico</b>											
Cane harvested	Tons	45,461,842	50,892,643	47,290,409	49,025,124	48,405,473	42,526,838	43,368,387	44,131,570	46,231,229	49,858,533
Area harvested	Has.	612,354	656,415	659,029	674,694	683,005	662,700	647,575	670,667	703,765	719,605
Sugar production	Tons	5,024,076	5,796,439	5,282,088	5,314,084	5,520,690	4,962,495	4,825,560	5,183,500	5,057,833	5,668,060
Refinado	Tons	1,824,242	1,957,951	1,830,906	1,844,862	1,702,112	1,670,555	1,602,793	1,708,423	1,565,016	1,970,874
Estandar	Tons	3,199,251	3,837,613	3,432,726	3,467,460	3,806,104	3,252,633	3,221,942	3,242,232	3,236,971	3,396,232
Other	Tons	583	875	18,456	1,762	12,474	39,306	804	232,847	246,483	300,955
Sugar production	Tons, raw value	5,325,521	6,144,225	5,599,013	5,632,929	5,851,931	5,260,245	5,115,094	5,494,510	5,361,303	6,008,144
Sucrose recovery	Percent	11.05	11.39	11.17	10.84	11.41	11.67	11.13	11.75	10.94	11.37
Cane yield	Tn/Ha.	74.24	77.53	71.76	72.66	70.87	64.17	66.97	65.80	65.69	69.29
Sugar yield	Tn/ha	8.20	8.83	8.01	7.88	8.08	7.49	7.45	7.73	7.19	7.88

Source: Mexico Sugar Chamber (CNIAA); Conadesuca.



# Managing Risk **21<sup>st</sup>** *in the* **CENTURY**

February 21-22, 2013  
Crystal Gateway Marriott Hotel  
Arlington, Virginia

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## Contacts and Links

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### Data

Tables from the *Sugar and Sweeteners Yearbook* are available in the Sugar and Sweeteners Topic 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>  
Sugar Topic Room, <http://www.ers.usda.gov/topics/crops/sugar-sweeteners.aspx>

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