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Sugar and Sweeteners Outlook

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U.S. domestic sugar production expected to fall slightly in 2015/16; Mexican sugar market expected to be relatively tighter in 2015/16

The next release is
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Approved by the
World Agricultural
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The USDA's May publication of the *World Agricultural Supply and Demand Estimate* (WASDE) provided its first projection for 2015/16. Domestic sugar production is expected to total 8.450 million short tons, raw value (STRV) for the year. This would be a 0.9-percent decrease from the revised 2014/15 production estimate of 8.527 million STRV. Imports for 2015/16 are projected at 3.810 million STRV, with 1.369 million STRV expected from quota programs—based on minimum commitments to the World Trade Organization and under Free Trade Agreements, since quota amounts have not yet been announced by the USDA—while 2.116 million STRV are expected from Mexico, up from the current estimate of 1.526 million STRV for 2014/15. Domestic deliveries for 2015/16 are projected at 12.120 million STRV, up 1.0 percent from 2014/15, based on a 1.1 percent increase of deliveries for food use to account for refined sugar's higher proportion of total caloric sweetener consumption. Ending stocks for 2015/16 are projected to be 1.547 million STRV, further lowered from the downward revision of the 2014/15 projection of 1.607.

Mexican sugar production in 2014/15 was revised downward by 50,000 metric tons, actual weight (MT), to 6.000 million MT, based on additional information on the impacts of adverse weather in the Veracruz production region earlier in the season. Production in 2015/16 is also projected to be 6.000 million MT, although less area is expected to be harvested, with higher sugar per hectare yields offsetting the decline. Exports for 2015/16 are projected to total 1.821 million MT, with 1.811 million MT destined for the United States. The U.S. share is based on the calculation of U.S. Needs as defined by the suspension agreements for the anti-dumping and countervailing duties investigations against Mexican sugar signed in December 2014. Domestic deliveries of sugar in 2015/16 are estimated at 4.574 million MT, unchanged from the 2014/15 projection, with human consumption totaling 4.250 million MT for both 2014/15 and 2015/16. With a relatively tight supply situation anticipated for Mexico in 2015/16, expanded sweetener consumption is expected to be accounted for primarily by high-fructose corn syrup, which is expected to increase from an estimated 1.420 million MT in 2014/15 to 1.478 million MT in 2015/16. Ending stocks for 2015/16 are projected to be 668,000 MT, down from the revised 2014/15 estimate of 907,000. This would result in a 15.7 percent stocks-to-domestic-consumption ratio for 2015/16, which is relatively low by historical standards. For 2014/15, the revised stocks-to-consumption ratio estimate is 21.3 percent.

United States Sugar Supply and Use for FY2016

The U.S. Department of Agriculture (USDA) released its first sugar supply and use projections for 2015/16. Total U.S. sugar production in 2015/16 is projected at 8.450 million short tons, raw value (STRV), a 76,000 STRV decline from current 2014/15 projections. Total supplies for the year are projected to be 13.867 million STRV—a 67,000 STRV decline from 2014/15—as there are currently fewer inventories to carry over into beginning stocks for the year, offsetting relatively higher imports.

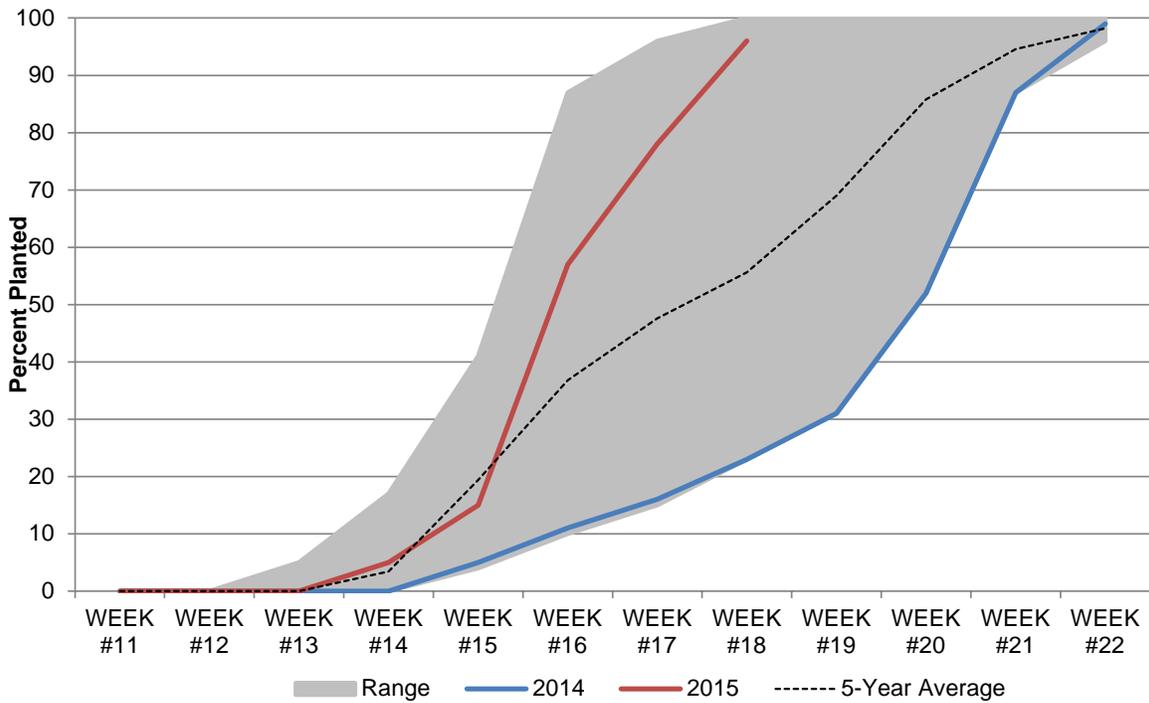
Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), May 2015.

Items	2013/14 (estimate)	2014/15 (estimate)	2015/16 (forecast)	2013/14 (estimate)	2014/15 (estimate)	2015/16 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	2,158	1,810	1,606	1,958	1,642	1,457
Total production	8,462	8,527	8,450	7,676	7,735	7,666
Beet sugar	4,794	4,762	4,770	4,349	4,320	4,328
Cane sugar	3,667	3,765	3,680	3,327	3,416	3,338
Florida	1,763	1,975	1,825	1,599	1,792	1,656
Louisiana	1,591	1,520	1,535	1,444	1,379	1,393
Texas	145	90	130	132	82	118
Hawaii	168	180	190	153	163	172
Total imports	3,742	3,464	3,810	3,394	3,143	3,457
Tariff-rate quota imports	1,302	1,528	1,369	1,181	1,386	1,242
Other program imports	305	400	315	277	363	286
Non-program imports	2,135	1,536	2,126	1,937	1,393	1,929
Mexico	2,130	1,526	2,116	1,932	1,384	1,920
Total supply	14,362	13,800	13,867	13,029	12,520	12,580
Total exports	306	200	200	278	181	181
Miscellaneous	0	0	0	0	0	0
Deliveries for domestic use	12,246	11,994	12,120	11,109	10,881	10,995
Transfer to sugar-containing products for exports under reexport program	82	100	100	74	91	91
Transfer to polyhydric alcohol, feed, other alcohol	29	35	35	27	32	32
Commodity Credit Corporation (CCC) sale for ethanol, other	316	0	0	287	0	0
Deliveries for domestic food and beverage use	11,819	11,859	11,985	10,722	10,758	10,873
Total Use	12,552	12,194	12,320	11,387	11,062	11,177
Ending stocks	1,810	1,606	1,547	1,642	1,457	1,404
Private	1,810	1,606	1,547	1,642	1,457	1,404
Commodity Credit Corporation (CCC)	0	0	0	0	0	0
Stocks-to-use ratio	14.42	13.17	12.56	14.42	13.17	12.56

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

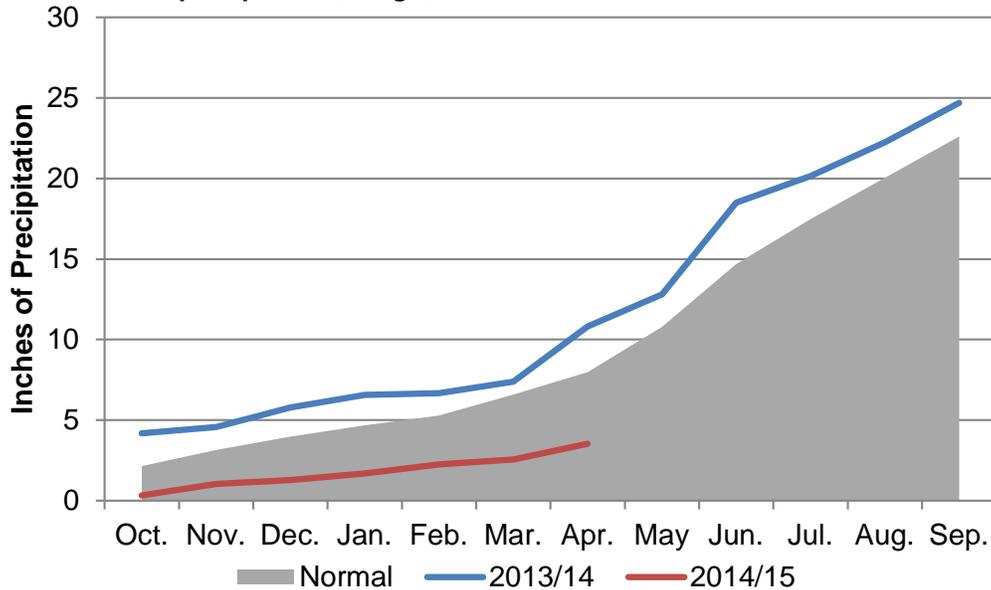
Beet sugar production in 2015/16 is projected at 4.770 million STRV, a slight increase from the current 2014/15 projection. Conditions during the beet planting season have been favorable for producers, with total plantings nearly complete through May 10—well above last year and the 5-year average. Dry conditions in the Midwest, and in particular in the production regions in Minnesota and North Dakota, are currently a concern for production prospects, however. Low precipitation levels through the fall and winter and continued dry conditions this spring have resulted in relatively dry soil-moisture levels that could be detrimental to crop development if conditions remain dry through the remainder of May and into June. The early planting of the crop provides the potential for strong yields for the year, but favorable weather conditions—including additional precipitation at key periods during the growing season—will be needed for those yields to be realized.

Figure 1
Sugarbeet planting progress, United States 2000 to 2015



Source: National Agricultural Statistics Service, USDA.

Figure 2
Cumulative precipitation, Fargo, ND

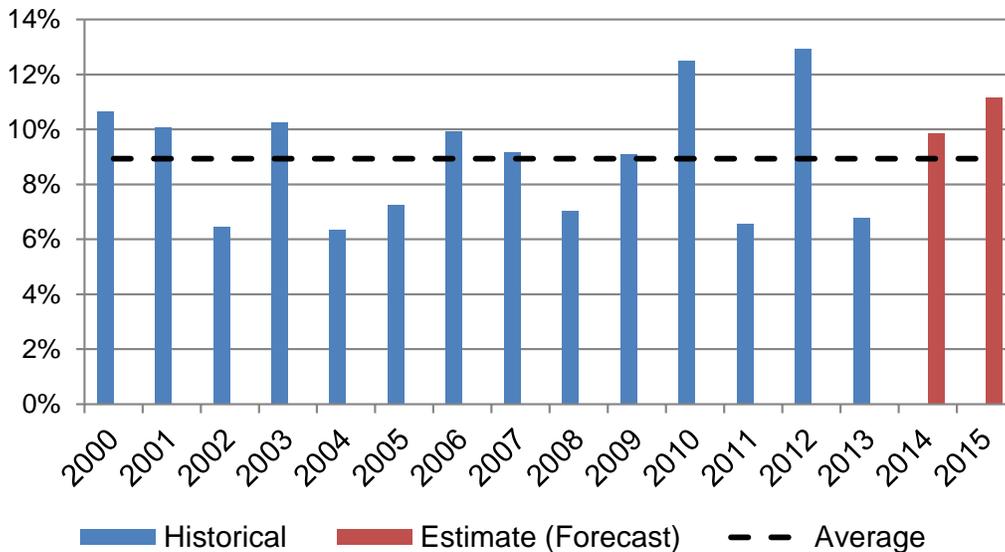


Source: Office of the Chief Economist, USDA.

The early planting season also carries the potential for an early harvest and for processors to produce sugar from the current crop in August and September. Given that WASDE sugar projections operate on an October to September fiscal year, sugar produced from the current crop during August and September is accounted for in the 2014/15 production period. Sugar production from the crop just planted is estimated to be about 4.900 million STRV, based

on reported planted acres, yields that are currently expected to be above average, and sucrose content rates that are in line with historical averages. If normal weather patterns occur during the growing season, there will be a high likelihood for more sugarbeets to be harvested and processed before the October 1 fiscal year starts. The current projections reflect that about 11 percent of the current crop’s sugar production would fall in August and September and are included in the revised 2014/15 production totals. This proportion is relatively larger than average, but not as high as 2010 and 2012 when planting was also completed relatively early. The beet sugar production projection for 2015/16 adjusts for the early harvest potential, as well as for an expected production for August and September 2016 that is in line with longer-term averages.

Figure 3
U.S. beet sugar production, Aug. and Sept. proportion of crop year production



Source: Economic Research Service, USDA.

Cane sugar for 2015/16 is projected at 3.680 million STRV, as production is expected to revert back to historical averages. Florida is expected to be the largest producing State once again with 1.825 million STRV, which is a 150,000 STRV decline from 2014/15 as yield and recovery rate are expected to return to levels more in line with historical averages after a relatively well-performing year in 2014/15. Louisiana is projected to produce 1.535 million STRV, a 15,000 STRV increase from the previous year. Texas production is projected at 130,000 STRV, a 40,000 STRV increase from the current 2014/15 projection, as weather conditions are expected to improve from the current year’s difficulties. Hawaii production is projected at 190,000 STRV, which would be a 10,000 STRV increase from the current 2014/15 projection.

Imports are currently projected at 3.810 million STRV for 2015/16, a 346,000 STRV increase from 2014/15. Projected imports under quota programs are projected at 1.369 million STRV. The tariff-rate quota (TRQ) for FY2016 has not yet been announced by the USDA, nor has the quota for specialty sugar. The current projection reflects the minimum commitment amount under agreements with the World Trade Organization (WTO) and various Free Trade Agreements (FTA) between the United States and trading partners. Imports for re-export are projected at 315,000 STRV, down from the current year’s projection of 400,000 STRV as market conditions are not expected to allow for the same availability of re-export licenses as in 2015/16. High-tier imports are projected to be 10,000 STRV for the year, in line with recent historical levels. Imports from Mexico are projected at 2.116 million STRV. This total reflects the calculation for U.S. Needs as defined by the Agreement Suspending the Countervailing Duty Investigations on Sugar from Mexico, signed by the U.S. Department of Commerce (USDOC) and the Government of Mexico in December 2014. However, since there has not been an announcement for the

specialty sugar quota, an additional 116,000 STRV is deducted from the U.S. Needs calculation, based on the volumes announced for the 2014/15 specialty sugar quota.

Total U.S. sugar use is projected to increase 126,000 STRV in 2015/16 to 12.320 million STRV. The increase is accounted for by higher expected deliveries for food use, projected at 11.985 million STRV, reflecting trends in total caloric sweetener consumption and the share of refined sugar of total caloric sweetener consumption. U.S. sugar exports are projected at 200,000 STRV, unchanged from the current 2014/15 projection.

Ending stocks for 2015/16 are projected to be 1.547 million STRV, which would represent a further draw-down of inventories compared with the carryover from 2014/15. Relatively lower ending stocks and higher total use result in the stocks-to-use ratio falling to 12.6 percent, compared with the current 13.2 percent projected for 2014/15. However, the ratio would total 13.5 percent—the targeted ratio set by the anti-dumping (AD) and countervailing duties (CVD) suspension agreements—with specialty sugar quota quantities equal to levels established for 2014/15 deducted from the U.S. Needs calculation.

United States Sugar Supply and Use for FY2015

Total sugar production is projected at 8.527 million STRV for 2014/15—a 118,000 STRV decrease from the previous month's projection, but a 69,000 STRV increase from the previous year. Cane sugar production is projected at 3.765 million STRV, down 10,000 STRV from the previous month. Production in Florida is estimated at 1.975 million STRV, up 25,000 STRV from April, based on processors' reports published in the May 2015 *Sweetener Market Data*. Production in Texas is projected at 90,000 STRV, down 35,000 STRV from April, as poor weather has continued to hamper harvesting efforts and sugarcane processing in the region. Sugar production in Louisiana and Hawaii remains unchanged from the April projection at 1.520 million STRV and 180,000 STRV, respectively.

Sugar production from beets is 4.762 million STRV for 2014/15, a 108,000 decline from the previous month. These changes represent updated processor data regarding production from the 2014/15 crop, as well as incorporating new information regarding the likelihood of early production of the crop currently being grown for 2015/16. Through April 2015, processors expect that 4.676 million STRV of sugar will be produced from beets grown in 2014. Additionally, with the NASS *Prospective Plantings* and *Crop Progress* reports that have been released, the outlook for the 2015 beet crop is the potential for a high-yield and above-average early-season production. The early season production that takes place in August and September will be accounted for in the 2014/15 production figures, as it occurs during the 2015 fiscal year. By subtracting production in August and September of 2014 and then adding the potentially above-average production expected in August and September 2015 (see discussion on 2015/16 beet sugar production above), the projected production for the 2014/15 fiscal year arrives at the level currently estimated.

Total imports for 2014/15 are projected at 3.464 million STRV, unchanged from the April projection. Imports under quota programs remain at 1.528 million STRV. Imports from Mexico remain at 1.526 million STRV, representing the calculation of U.S. Needs from the March WASDE report, as defined by the suspension agreement between the USDOC and the Government of Mexico. While imports from Mexico have lagged due to market uncertainties surrounding the AD and CVD investigations conducted by the USDOC and the U.S. International Trade Commission (USITC), Mexico still has enough time in the fiscal year and the logistical capacity to ship its full quota amount.

Total U.S. sugar use for 2014/15 is projected to be 12.194 million STRV, down 25,000 STRV from the April projection. This change is entirely due to lower expected exports, which are projected at 200,000 STRV, a 25,000 STRV decline from April. This change was due primarily to the pace-to-date data for the U.S. sugar re-export program through March. According to recent news reports, there have been policy proposals introduced in Mexico regarding changes to the IMMEX program. This would likely lower the demand for U.S. exports, which are predominantly destined for Mexico's IMMEX program and then shipped back to the United States and other countries as sugar-containing products. The current WASDE projection, however, does not reflect any such potential changes in policy and assumes that the IMMEX program remains as it is currently administered.

Domestic sugar deliveries for food use in 2014/15 remain unchanged from April's projections at 11.859 million STRV. The pace of deliveries in the U.S. market has been affected by the developments and uncertainties created by in the AD/CVD investigations and the subsequent suspension agreements. Deliveries from non-reporting entities (also referred to as direct consumption imports (DCI)) continue to be a fluctuating variable affecting the outlook for total deliveries. Monthly figures reporting DCI for 2014/15 began substantially behind the historical pace prior to implementation of the suspension agreement terms in January. The pace has increased overall since, but still fluctuates. Current projections of U.S. deliveries for food use remain unchanged, as the outlook for imports from Mexico is that shipments are expected to meet the allotted volume defined by the suspension agreements. The outlook for DCI will likely be closely linked to the pace of imports from Mexico through the remainder of the fiscal year. Therefore, the outlooks for deliveries and imports are expected to be closely tied through the remainder of the projection period.

Ending stocks for 2014/15 are projected at 1.607 million STRV, down from 1.700 million STRV in April, as the decline in projected total supplies will exceed the lower total-use projections. The projected stocks-to-use ratio is 13.2 percent, down from the previous month's projected 13.9 percent.

Mexico Sugar Supply and Use in FY2016

Beginning stocks in Mexico for 2015/16 are expected to be 907,000 metric tons, actual weight (MT), 76,000 above the previous year's beginning stocks. Total supplies are expected to be 7.062 million MT, also 76,000 MT larger than 2014/15. Imports are projected at 155,000 MT, unchanged from 2014/15. Imports as part of the IMMEX program are expected to be 145,000 MT, also unchanged from the previous year. As with the projections for U.S. sugar exports, the current IMMEX projections do not reflect any potential or proposed changes to the IMMEX program from the Mexican Government.

Production in Mexico is projected to be 6.000 million MT for 2015/16. This is unchanged from the current 2014/15 projection, although harvested area for 2015/16 is expected to be about 20,000 hectares lower than current 2014/15 expectations due to the lagged effect between harvested area and sugarcane reference prices—which are considerably lower than price levels during FY2010 to FY2012. Higher sugar per acre yields are expected to offset the declining area to keep production relatively unchanged.

Domestic deliveries in Mexico for 2015/16 are expected to total 4.574 million MT, unchanged from 2015/16. Deliveries to the IMMEX program are projected to be 324,000 MT. Domestic human consumption is currently projected to remain at 4.250 million MT, the same as current projections for 2014/15. Total sweetener consumption—including both sugar and high-fructose corn syrup (HFCS)—is expected to increase in line with population increases, however, to 5.728 million MT, a 58,000 MT increase from current 2014/15 consumption. Due to relatively tight projected supplies, the increase in sweetener use is expected to be accounted for by HFCS increases.

Mexican sugar exports for 2015/16 are projected to be 1.821 million MT, a 315,000 MT increase from current 2014/15 projections. Exports to the United States are based on the calculation of U.S. Needs, as defined by the suspension agreements for the AD/CVD investigations signed between the USDOC and Government of Mexico. As explained above in the description for 2015/16 U.S. sugar projections, the calculation assumes that the U.S. specialty sugar import quota will be 105,000 MT, raw value—based on 2014/15 quotas— when calculating U.S. Needs, although this quota has not yet been announced. Exports to the United States are projected at 1.811 million MT, which would be nearly a 39 percent increase from 2014/15 projections. With strong demand expected from the United States and limited supplies available for exports elsewhere, a de minimus amount of 10,000 MT is projected to be exported to other countries.

Table 2 -- Mexico sugar supply and use, 2012/13 - 2013/14 and projected 2014/15, May 2015

Items	2013/14 (estimate)	2014/15 (estimate)	2015/16 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	1,460	831	907
Production	6,021	6,000	6,000
Imports	131	155	155
Imports for consumption	9	10	10
Imports for sugar-containing product exports (IMMEX) 1/	123	145	145
Total supply	7,613	6,987	7,062
Disappearance			
Human consumption	4,098	4,250	4,250
For sugar-containing product exports (IMMEX)	324	324	324
Statistical adjustment	-151	0	
Total	4,271	4,574	4,574
Exports	2,511	1,506	1,821
Exports to the United States & Puerto Rico	1,823	1,306	1,811
Exports to other countries	689	200	10
Total use	6,782	6,080	6,395
Ending stocks	831	907	668
	1,000 metric tons, raw value		
Beginning stocks	1,548	881	961
Production	6,383	6,360	6,360
Imports	139	165	165
Imports for consumption	9	11	11
Imports for sugar-containing product exports (IMMEX)	130	154	154
Total supply	8,069	7,406	7,486
Disappearance			
Human consumption	4,344	4,505	4,505
For sugar-containing product exports (IMMEX)	343	343	343
Statistical adjustment	-160	0	0
Total	4,527	4,848	4,848
Exports	2,662	1,596	1,930
Exports to the United States & Puerto Rico	1,932	1,384	1,920
Exports to other countries	730	212	11
Total use	7,189	6,445	6,778
Ending stocks	881	961	708
Stocks-to-human consumption (percent)	20.3	21.3	15.7
Stocks-to-use (percent)	12.3	14.9	10.4
High fructose corn syrup (HFCS) consumption (dry weight)	1,372	1,420	1,478

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

Source: USDA, WASDE and ERS, Sugar and Sweeteners Outlook; Conadesuca.

Ending stocks for 2015/16 are projected to be 668,000 MT, down significantly from the current 2014/15 projection of 907,000 MT. This will result in a 15.7 percent stocks-to-consumption ratio for 2014/15, which is relatively low by historical standards, illustrating the relatively tight outlook for the Mexican sugar market in 2015/16.

Mexico Sugar Supply and Use in FY2015

Projected Mexican beginning stocks for 2014/15 remain at 831,000 MT, unchanged from the April figure. Projected imports are expected to be 155,000 MT, a 19,000 MT decline from the previous month. This decline is the result of IMMEX imports expected at 145,000 MT, a 19,000 MT decline from previous projections, due to lower U.S. sugar exports.

Mexican 2014/15 sugar production is projected at 6.000 million MT, down from a 6.050 million projection in April. The adjustment is the result of additional information regarding the harvest progress and the impact of the heavy rains in the Veracruz production region in March and April. Through May 2nd, Mexican growers had harvested nearly 640,000 hectares of sugarcane, just slightly behind last year's pace. Yields remain lower than last year and recovery rates, which had been above last year, have leveled off and are now comparable with last year's rate. As a result, sugar production was 1.1 percent lower than last year as of the May 2nd report.

Figure 4
Mexican sugarcane production, by week of harvest, 2010/11-2014/15

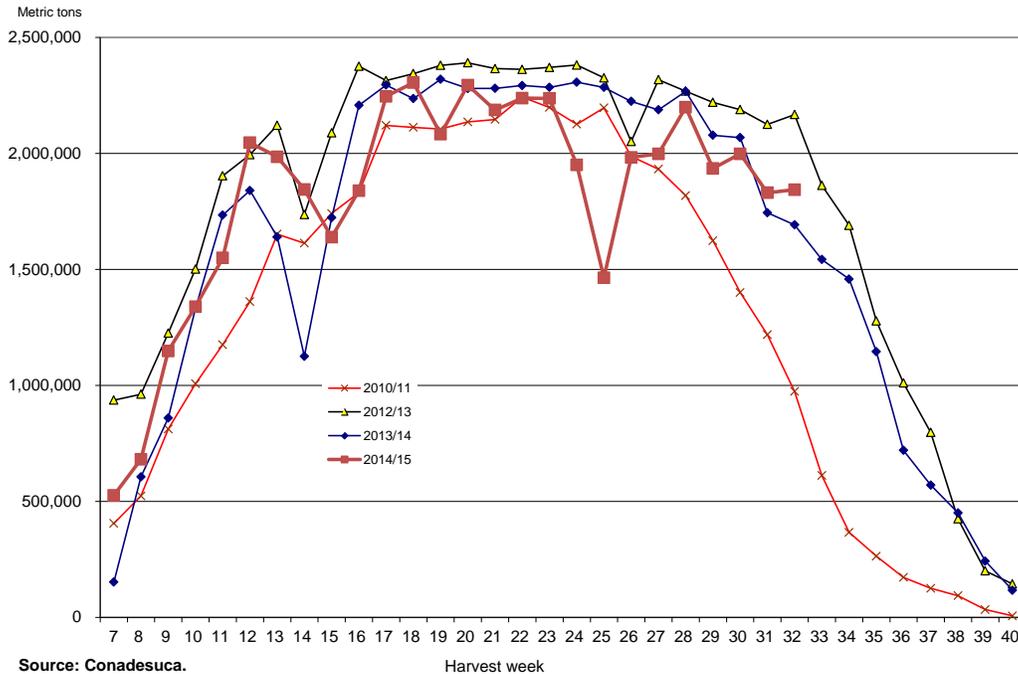


Figure 5
Cumulative Mexican sugarcane yield in metric tons (mt) per hectare (ha) during harvest season

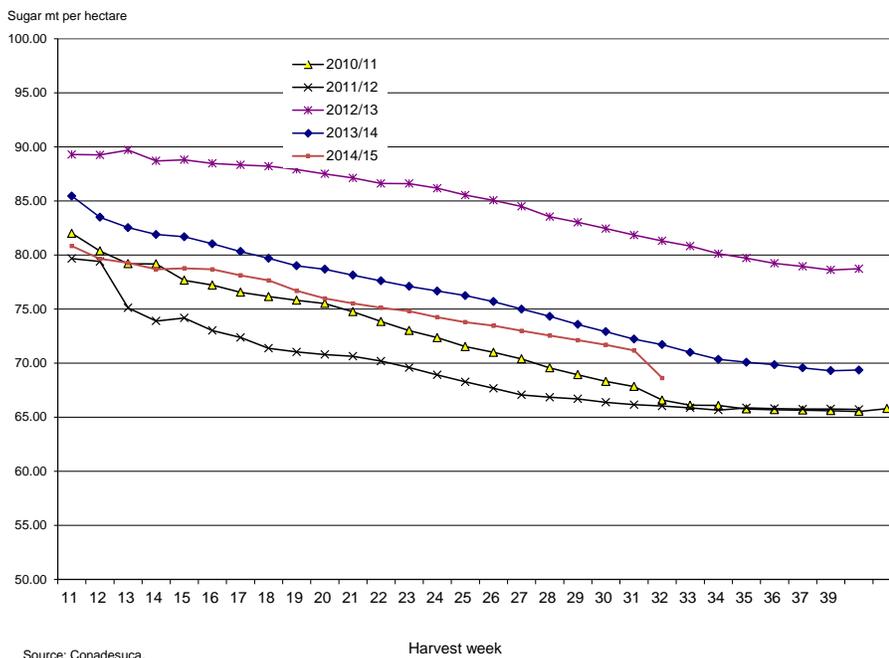
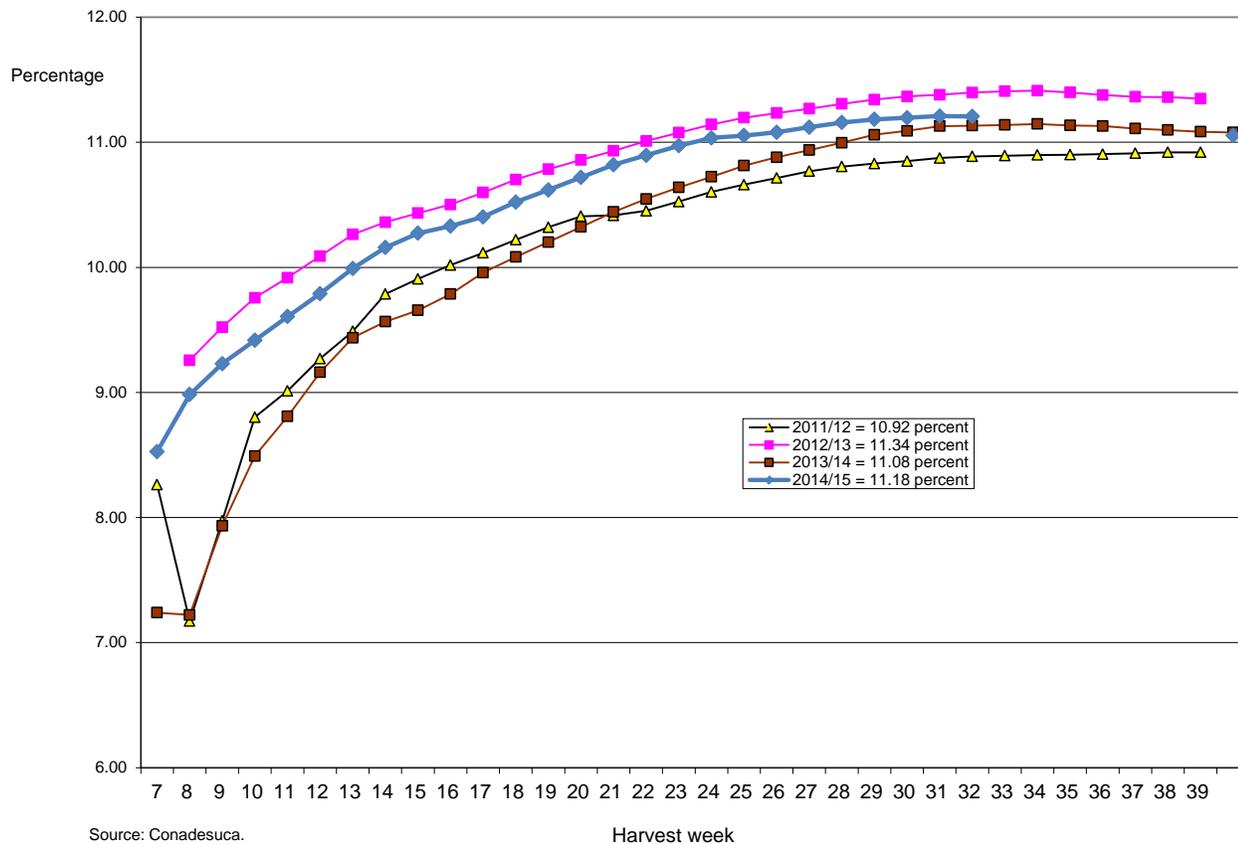


Figure 6
Intra-seasonal, cumulative sugar recovery rates in Mexico, recent crop years



Source: Conadesuca.

In April, the *Comité Nacional Para Desarrollo de la Caña de Azúcar* (Conadesuca) released its third estimate for the 2014/15 production year. This was the first estimate from the agency since the extreme weather in Veracruz. The agency lowered its expected harvested area to nearly 806,000 hectares, down from 815,000, and lowered its sugar production to 5.999 million MT. According to the May 2 harvest report, the pace of harvested area remains 29,000 hectares behind the agency’s current estimate. May and June are typically months where the Mexican harvest begins to conclude, with weekly harvested area declining and the majority of the area already harvested. The 2014/15 harvest appears to be following a similar trajectory to that of the previous year, with area harvested beginning to decline on a weekly basis. Whether growers meet the agency’s current estimate will be determined by how many acres they will be able to harvest later in the year and whether that cane will have the enough yield and sucrose to make up for the losses created by the weather-related events earlier in the season.

The USDA projects total Mexican sugar supplies for 2014/15 at 6.987 million MT, a 69,000 MT decline from the previous month’s estimate due to the lower outlook for production and imports.

Domestic deliveries for 2014/15 in Mexico are projected at 4.574 million MT by the USDA, unchanged from April. Domestic consumption is projected to be 4.250 million MT, which remains a 3.7 percent increase from 2013/14 consumption. Through March, Conadesuca reports that human consumption of sugar is 18.0 percent above the previous year’s pace. Consumption in 2013/14 was relatively low by historical comparisons, which is part of the reason for the strong year-over-year increase. The pace of consumption continues strong, however, and will be closely monitored for the remainder of the production year.

Mexican exports for 2014/15 are projected at 1.506 million MT, unchanged from April. Exports to the United States remain at 1.306 million MT, based on the calculation of U.S. Needs from March, as defined in the suspension

agreements between the USDOC and the Government of Mexico. Exports to other countries are projected at 200,000 MT.

Ending stocks for 2014/15 are estimated at 907,000, down 69,000 MT from April due to fewer supplies expected relative to last month's estimate. The stocks-to-consumption ratio is projected to be 21.3 percent, down slightly from April's estimate of 23.0 percent, although still in line with historical levels.

U.S. Department of Commerce Resumes Anti-Dumping and Countervailing Duty Investigations upon Appeal

On April 27, 2015, the USDOC announced that it would resume its AD and CVD investigations. The announcement was made after determining that the two sugar cane refining companies that filed an appeal to the agency had legal standing to do so, although they were not petitioners in the initial investigation. The investigations were initiated in March 2014, but were suspended in December 2014 as a result of an agreement between the USDOC and the Government of Mexico. The terms of the agreement limited quantities and prices of raw and refined sugar that could be imported from Mexico, but agreed not to impose duties that were set by the preliminary investigations. The duties will not be imposed with the continuation of the investigation. The USDOC is expected to release a decision by September 16, 2015, which is 135 days after the decision was published in the May 4 edition of the *Federal Register*.

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