



Sugar and Sweeteners Outlook

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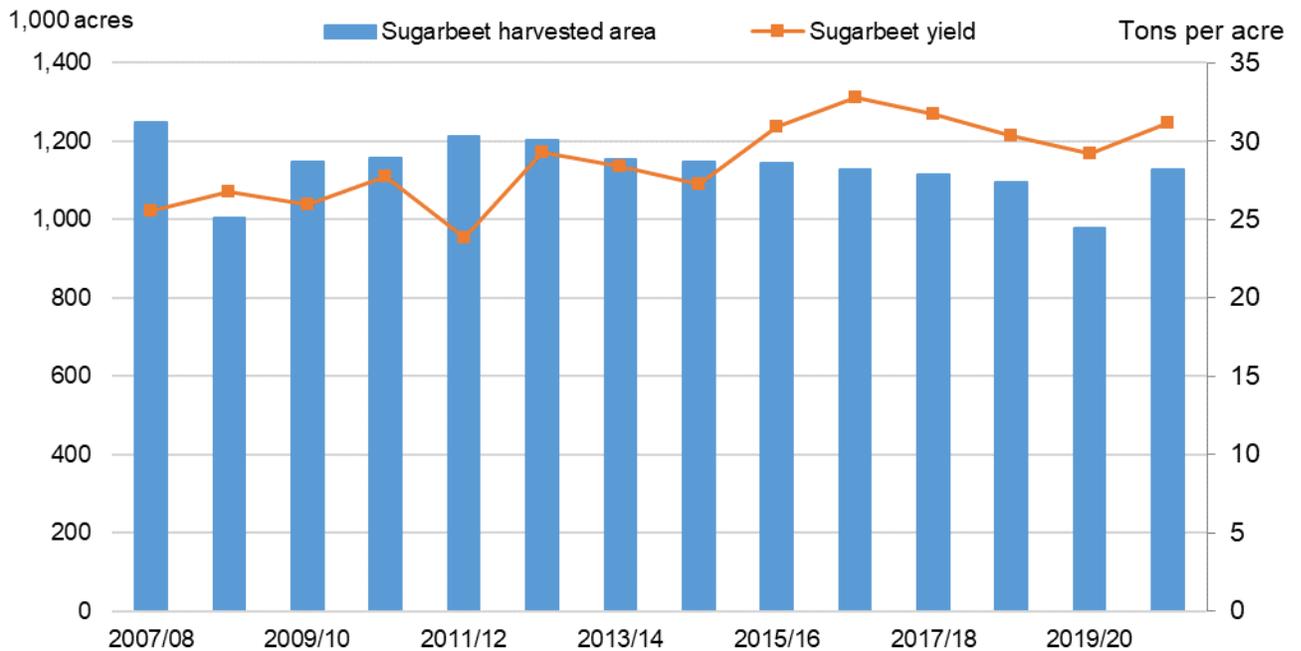
U.S. Sugar Production Raised for 2020/21 on Larger Texas Sugarcane Crop

Higher expected domestic production from the sugarcane sector more than offsets lower beet sugar production. Sugar production for Texas is projected higher based on an upward revision to yields. Beet sugar production is reduced with lower sugar beet yields in several key regions. Overall, U.S. sugar production is projected at 9.292 million short tons, raw value (STRV), up 27,000 from the previous estimate and up 16 percent from 2019/20. Sugar production for 2019/20 was not adjusted this month.

For 2019/20, both imports and deliveries are adjusted higher, resulting in a marginal increase in ending stocks and a slight reduction in the stocks-to-use ratio to 14.2 percent. For 2020/21, domestic deliveries and total use projections are raised from the previous month's forecast. The stocks-to-use ratio for 2020/21 is lowered from 14.6 percent to 13.5 percent on lower imports from Mexico under provisions of the anti-dumping and countervailing (AD/CVD) Suspension Agreements.

Mexico sugar production is unchanged from the previous estimate. Ending stocks in 2019/20 are adjusted slightly higher as a result of reduced exports and stronger imports, which combine to more than offset an increase in deliveries for IMMEX. Ending stocks in 2020/21 are projected unchanged from the previous month, with a slightly higher export estimate equal to the small increase in beginning stocks. Mexico's total exports are projected higher as a significant boost in shipments to non-U.S. markets exceeds a sizable reduction in exports to the United States.

Figure 1
Sugarbeet harvested area and yields, 2007/08 to 2020/21



Source: USDA, National Agricultural Statistics Service.

United States Outlook

Production Up and Imports Down

In the USDA's September *World Agricultural Supply and Demand Estimates (WASDE)*, U.S. supplies of sugar in 2020/21 totaled 13.949 STRV, a 103,000-STRV reduction from the previous month as lower expected imports more than offset increased production. Domestic deliveries are boosted for both 2019/20 and 2020/21. Ending stocks for 2020/21 are reduced to bring the stocks-to-use ratio to 13.5 percent, based on the terms of the Suspension Agreements.

Table 1: U.S. sugar: Supply and use by fiscal year (Oct./Sept.), September 2020

Items	2018/19	2019/20	2020/21	2018/19	2019/20	2020/21
		(estimate)	(forecast)		(estimate)	(forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	2,008	1,783	1,745	1,822	1,617	1,583
Total production	8,999	7,989	9,292	8,163	7,247	8,430
Beet sugar	4,939	4,244	5,165	4,480	3,850	4,686
Cane sugar	4,060	3,745	4,127	3,683	3,397	3,744
Florida	2,005	2,106	2,135	1,819	1,910	1,937
Louisiana	1,907	1,513	1,850	1,730	1,372	1,678
Texas	147	126	142	134	115	129
Hawaii	0	0	0	0	0	0
Total imports	3,070	4,263	2,913	2,785	3,868	2,642
Tariff-rate quota imports	1,541	2,256	1,624	1,398	2,047	1,474
Other program imports	438	415	350	397	376	318
Non-program imports	1,092	1,592	938	990	1,444	851
Mexico	1,000	1,382	888	908	1,254	806
High-duty	91	210	50	83	191	45
Total supply	14,076.75	14,035	13,949	12,770	12,732	12,655
Total exports	35	35	35	31	32	32
Miscellaneous	28	0	0	26	0	0
Deliveries for domestic use	12,231	12,255	12,255	11,096	11,118	11,118
Transfer to sugar-containing products						
for exports under re-export program	98	80	80	89	73	73
Transfer to polyhydric alcohol, feed, other alcohol	27	25	25	25	23	23
Commodity Credit Corporation (CCC) sale for ethanol, other	0	0	0	0	0	0
Deliveries for domestic food and beverage use	12,106	12,150	12,150	10,982	11,022	11,022
Total use	12,294	12,290	12,290	11,153	11,149	11,149
Ending stocks	1,783	1,745	1,659	1,617	1,583	1,505
Private	1,783	1,745	1,659	1,617	1,583	1,505
Commodity Credit Corporation (CCC)	0	0	0	0	0	0
Stocks-to-use ratio	14.50	14.20	13.50	14.50	14.20	13.50

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

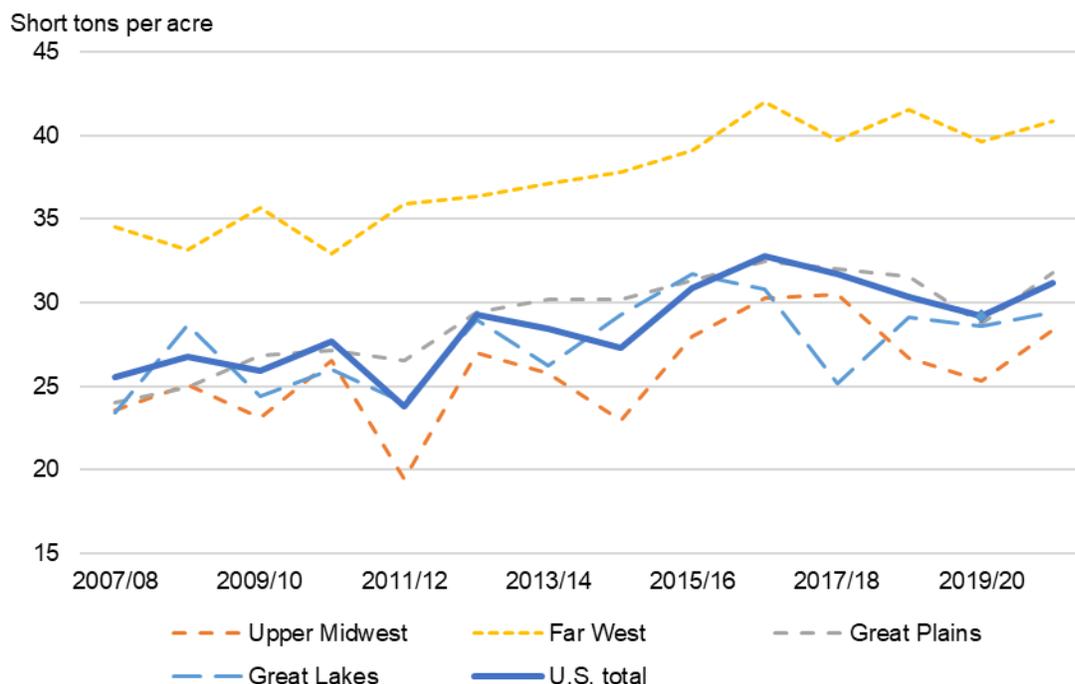
Beet Sugar Production Lower on Reduced Beet Yields

U.S. 2020/21 sugar production from beets was lowered this month due to reduced sugar beet yields in several key regions, as reported by USDA's National Agricultural Statistics Service (NASS). The largest reduction from the previous month was for the Upper Midwest, which accounts for about half of U.S. sugar beet production overall. Production for the Great Lakes and Great Plains regions was also trimmed. The Northwest region's sugar beet production was revised higher, partly offsetting reductions for other regions. At 31.2 tons/acre, the national average yield is lowered slightly from last month but is still up by 7 percent from 2019/20.

Table 2: U.S. sugar beet area harvested, yield, and production, by region

<i>Area harvested by region (1,000 Acres)</i>					August	September	Monthly
	2016/17	2017/18	2018/19	2019/20	2020/21	2020/21	Change
Great Lakes	149.0	143.0	147.0	145.0	152.0	152.0	0.0%
Upper Midwest (MN, ND)	620.0	621.0	607.0	506.0	631.0	631.0	0.0%
Great Plains	150.1	148.5	142.7	127.0	142.6	142.6	0.0%
NW (ID, OR, WA)	182.1	176.9	174.1	176.8	176.8	176.8	0.0%
California	25.2	24.7	24.6	24.5	24.4	24.4	0.0%
US	1,126.4	1,114.1	1,095.4	979.3	1,126.8	1,126.8	0.0%
<i>Yield by region (short tons per acre)</i>							
Great Lakes	30.80	25.20	29.30	28.60	29.60	29.40	-0.7%
Upper Midwest (MN, ND)	30.26	30.53	26.72	25.34	28.83	28.40	-1.5%
Great Plains	32.48	32.05	31.56	28.74	31.87	31.77	-0.3%
NW (ID, OR, WA)	41.50	39.16	40.52	39.04	39.88	40.26	1.0%
California	45.12	43.16	48.78	44.08	45.29	45.29	0.0%
US	32.78	31.70	30.38	29.20	31.41	31.19	-0.7%
<i>Production by region (1,000 short tons)</i>							
Great Lakes	4,589.0	3,604.0	4,307.0	4,147.0	4,499.0	4,469.0	-0.7%
Upper Midwest (MN, ND)	18,762.0	18,960.0	16,217.0	12,820.0	18,194.0	17,920.0	-1.5%
Great Plains	4,875.0	4,759.0	4,503.0	3,650.0	4,544.0	4,531.0	-0.3%
NW (ID, OR, WA)	7,557.0	6,928.0	7,055.0	6,903.0	7,051.0	7,118.0	1.0%
California	1,137.0	1,066.0	1,200.0	1,080.0	1,105.0	1,105.0	0.0%
US	36,920.0	35,317.0	33,282.0	28,600.0	35,393.0	35,143.0	-0.7%

Source: USDA, National Agricultural Statistics Service.

**Figure 2
Yields, sugarbeets, by region, 2007/08 to 2020/21**

Source: USDA, National Agricultural Statistics Service.

Table 3: Beet sugar production projection calculation, 2019/20 and 2020/21

	2015/16	2016/17	2017/18	2018/19	2019/20	2019/20	2020/21	2020/21
					August	September	August	September
Sugarbeet production (1,000 short tons) 1/	35,371	36,881	35,325	33,282	28,600	28,600	35,393	35,143
Sugarbeet shrink	6.5%	8.3%	7.3%	5.2%	5.7%	5.3%	6.6%	6.6%
Sugarbeet sliced (1,000 short tons)	33,066	33,834	32,742	31,561	26,984	27,072	33,063	32,830
Sugar extraction rate from slice	14.58%	13.72%	15.18%	14.77%	14.11%	14.22%	14.51%	14.51%
Sugar from beets slice (1,000 STRV) 2/	4,820	4,643	4,970	4,660	3,807	3,851	4,798	4,764
Sugar from molasses (1,000 STRV) 2/	380	352	368	352	350	342	360	360
Crop-year sugar production (1,000 STRV) 2/	5,201	4,995	5,338	5,012	4,157	4,192	5,158	5,124
August-September sugar production (1,000 STRV)	688	606	715	655	582	582	633	633
August-September sugar production of subsequent crop (1,000 STRV)	606	715	655	582	633	633	638	638
Sugar from imported beets (1,000 STRV) 3/	--	--	--	--	36	--	36	36
Fiscal year sugar production (1,000 STRV)	5,119	5,103	5,279	4,939	4,244	4,243	5,199	5,165

1/ USDA, National Agricultural Statistics Service for historical data. 2/ August-July basis. 3/ Sugar from imported beets split out for projections only, included in total once full crop-year slice is recorded. Sugar from imported beets is incorporated into total production in historical data.

Note: STRV = short tons, raw value.

Source: USDA, Economic Research Service and World Agricultural Outlook Board.

Cane Sugar Production Raised on Higher Sugarcane Forecast Production in Texas

Cane sugar production is projected to be 4.127 million STRV in 2020/21, up 61,000 from the previous month with Texas accounting for the entire change. Texas sugarcane yields are reported by NASS at 33.3 tons per acre, up from the August projection of 21.9, as the impacts of Hurricane Hanna on this sector were less severe than originally believed. Yields are still down slightly from 2019, but total production is higher with a larger area harvested. Sugar production for the largest producing states, Louisiana and Florida, remains unchanged from the previous month. The national average sugarcane yield is projected at 36.6 tons per acre, up from last month's forecast of 36.2 and the 2019 yield of 35.0.

Table 4: U.S. sugarcane and cane sugar production, by State, 2015/16 to 2020/21

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Annual change
							Percent
Florida							
Sugarcane harvested for sugar (1,000 acres)	398	392	397	397	397	399	0.6
Sugarcane yield (short tons per acre)	42.5	40.3	40.9	41.7	42.8	43.6	1.9
Sugarcane production (1,000 short tons)	16,915	16,120	16,237	16,555	16,992	17,406	2.4
Recovery rate (percent)	12.8	12.7	12.2	12.1	12.4	12.3	-0.8
Sugar production (1,000 STRV)	2,173	2,055	1,983	2,005	2,100	2,135	1.7
Louisiana							
Sugarcane harvested for sugar (1,000 acres)	385	400	414	425	442	456	3.2
Sugarcane yield (short tons per acre)	29.6	28.8	32.5	35.3	27.7	30.9	11.6
Sugarcane production (1,000 short tons)	11,396	11,520	13,455	15,003	12,243	14,095	15.1
Recovery rate (percent)	12.5	14.2	13.8	12.5	12.4	13.1	6.2
Sugar production (1,000 STRV)	1,428	1,632	1,862	1,875	1,513	1,850	22.3
Texas							
Sugarcane harvested for sugar (1,000 acres)	35	38	41	38	31	33	5.4
Sugarcane yield (short tons per acre)	31.4	37.0	36.8	36.6	33.8	33.3	-1.5
Sugarcane production (1,000 short tons)	1,105	1,395	1,490	1,376	1,058	1,098	3.8
Recovery rate (percent)	10.5	9.9	11.3	10.7	11.9	12.9	8.6
Sugar production (1,000 STRV)	116	138	169	148	126	142	12.7

Note: STRV = short tons, raw value.

Source: USDA, Farm Service Agency; USDA, National Agricultural Statistics Service.

U.S. Food and Beverage Deliveries Projected Higher on Stronger Pace

Food and beverage deliveries in the United States are estimated at 12.150 million STRV for 2019/20, up 100,000 from the previous forecast based on a strong pace of deliveries. The 2020/21 deliveries are also projected at 12.150 million STRV, up 25,000 from the previous forecast.

Through July 2020, food and beverage deliveries in 2019/20 are 0.3 percent higher than the previous year. As has been expected, due to the reduction in beet sugar production and the increase in the raw sugar tariff-rate quotas (TRQs), deliveries from beet processors are down 12.2 percent, and deliveries from cane refiners are 4.8 percent higher than a year ago.

Table 5: Food and beverage deliveries, 2014/15 to 2019/20, October through July

	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Annual change
	1,000 short tons, raw value						Percent
Beet sugar processors	3,944	3,753	4,410	4,364	4,173	3,662	-12.2
Cane sugar refiners	5,140	5,289	4,995	5,032	5,203	5,451	4.8
Total reporters	9,084	9,042	9,405	9,397	9,376	9,113	-2.8
Non-reporter, direct consumption	737	718	608	591	633	929	46.8
Total deliveries	9,821	9,759	10,012	9,988	10,008	10,041	0.3
Final fiscal year deliveries 1/	11,921	11,881	12,102	12,048	12,106	12,150	0.4

1/ Latest *World Agricultural Supply and Demand Estimates* estimate for 2019/20.

Source: USDA, Farm Service Agency.

Deliveries from non-reporters are 46.8 percent higher than the year prior, more than compensating for the reduced deliveries from reporting companies. One major driver of this fast pace has been an increase in the World Trade Organization (WTO) refined TRQ, which now stands at 408,000 STRV, nearly double the level of the previous year. Further contributing to the fast pace of non-reporter imports is the growth of high-tier imports due to price differentials between the world futures markets and the U.S. wholesale market (discussed in next section). Lastly, a higher proportion of sugar entering under Free Trade Agreements this year has been higher polarity sugar that doesn't require additional refining.

On September 10, 2020, USDA announced that the TRQ for raw cane sugar was increased by 100,000 STRV and that the time frame for importing under the fiscal year (FY) 2020 TRQ would be extended by 1 month to October 31. While uncertainties remain in the market, food and beverage deliveries are expected to continue slightly above last year's pace in the remaining 2 months of FY 2020.

The extension of the TRQ by an additional month is expected to result in the bulk of the added TRQ imports being imported in October and thus accounted for in 2020/21. In view of this

development and recent trends, 2020/21 sugar deliveries are projected at 12.150 million STRV, up 25,000 from the previous forecast, but unchanged year over year.

High-Tier Tariff Imports Up Sharply in July, USDA Raises Raw Sugar TRQ

High-tier imports jumped to nearly 70,000 STRV in July and remained around 40,000 in August, compared to an average pace of 9,000 STRV over the previous 9 months and higher than had been projected last month. For much of the past year, the spread between U.S. and world sugar prices has been wider than the high-tier tariff (for raw sugar, 33.87 cents per kilogram or 15.4 cents per pound for raw sugar; for refined sugar, 35.74 cents per kilogram or 16.2 cents per pound). Depending upon the country of origin, the usual cost of freight and associated logistics can be as low as 3-4 cents per pound for raw sugar, and 5-6 cents per pound for refined sugar. Figure 3 shows a nominal refined sugar price spread for August 2020 of more than 27 cents per pound. However, contracting for U.S. refined sugar for next year is reported at much lower price levels and this spread is expected to narrow, as world refined sugar futures prices are not indicating any downward movement. As such, USDA's September estimate for FY 2020 high-tier imports is increased by 30,000 STRV to 210,000 STRV due to an increased pace in recent months. Next year's high-tier import forecast remains at 50,000 STRV.

On September 10, 2020, USDA increased the FY 2020 U.S. WTO raw sugar TRQ by 100,000 STRV and extended the quota period by 1 month, to October 31, 2020. Along with the April 2020 increase of 350,000 STRV, this action brought the total TRQ to 1.681 million STRV.

Estimated Imports under quota programs in 2019/20 are raised 19,000 STRV from the previous month's report to 2.256 million STRV. For 2020/21 the estimate is raised 59,000 STRV to 1.624 million STRV. The increases are due, in part, to the USDA raw sugar TRQ increase. The extension of the 2019/20 raw sugar TRQ to October 31 means about 66,000 STRV of those entries will occur in the 2020/21 fiscal year. The expected shortfall for the 2020/21 raw sugar TRQ is still expected to be 99,000 STRV, with the additional imports due to the extension of the previous year's quota. Imports under Canada's refined TRQ established under the United States-Mexico-Canada Agreement (USMCA) during FY 2020 were increased by 6,930 STRV based on pace. Projected re-export program imports were increased this month by 65,000 STRV on the basis of pace. Thus, total FY 2020 imports are now forecast at 4.263 million STRV, up 101,000 STRV from last month. For FY 2021, total imports are forecast at 2.913 million STRV, down 131,000 STRV from last month. More than offsetting this change are

reduced imports from Mexico on the revised calculation of U.S. Needs as set out in the AD/CVD Suspension Agreements for the month of September.

Figure 3
U.S. and world refined sugar prices, monthly, January 2008 to September 2021

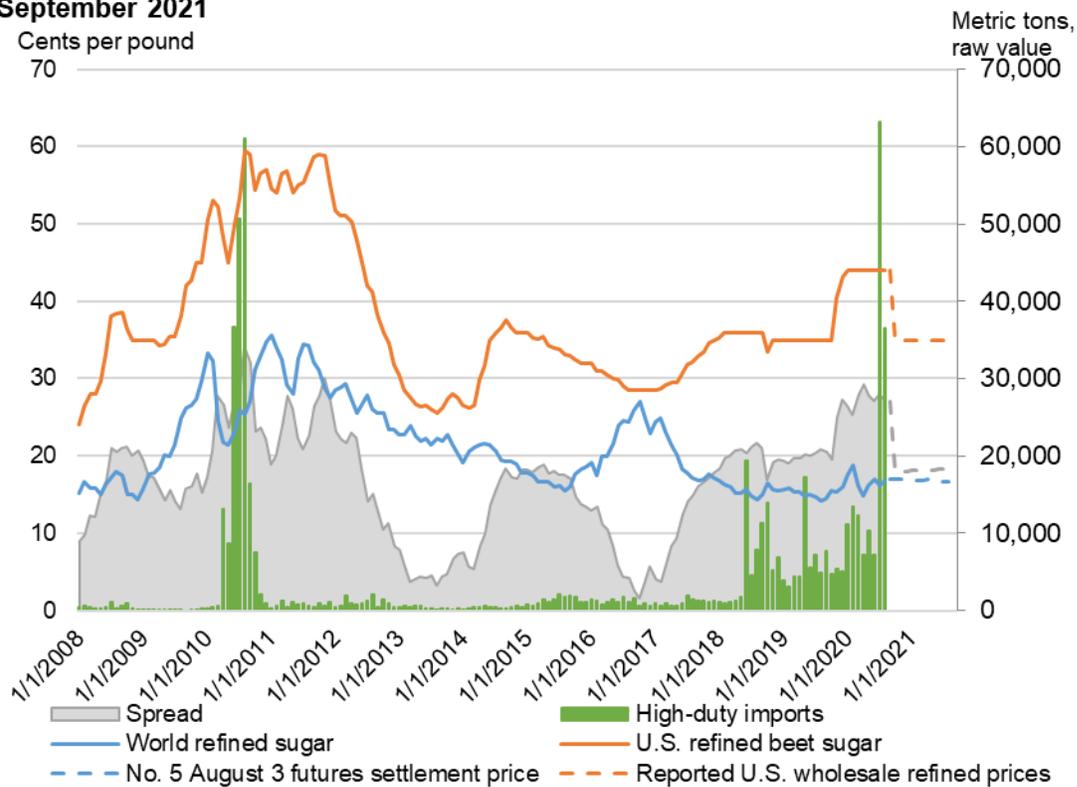
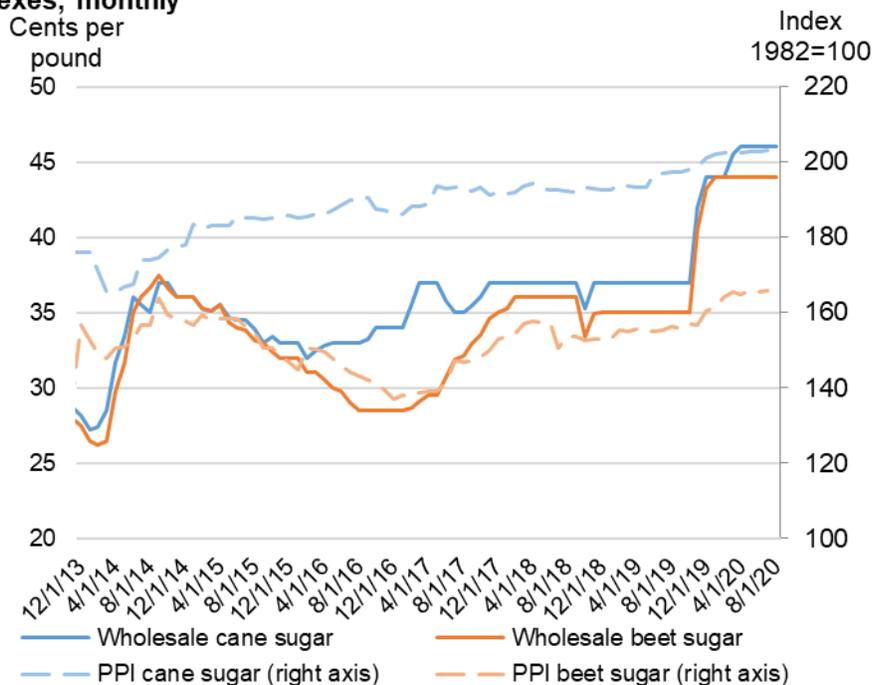


Figure 4
**Refined sugar prices, wholesale and Producer Price
 Indexes, monthly**



Note: Produce Price Index (PPI)
 Source: USDA, Economic Research Service.

Ending Stocks Up Marginally for 2019/20, but Lowered for 2020/21

U.S. 2019/20 ending stocks are estimated to be marginally higher at 1.745 million STRV as stronger imports were mostly offset by larger deliveries. The stocks-to-use ratio, now projected at 14.20 percent, is down slightly from the 14.31 percent forecast last month.

For 2020/21, the ending U.S. stocks-to-use ratio is set at 13.5 percent as a result of the terms of the U.S.-Mexico sugar Suspension Agreements. Imports from Mexico are set as the residual requirements to achieve that 13.5 percent ratio, a reduction from the August projection of 14.6 percent. Ending stocks are projected down approximately 128,000 STRV to 1.659 million STRV.

Mexico Outlook

Production Outlook Unchanged

Mexico sugar production for 2019/20 is still estimated at 5.278 million metric tons, actual value (MT) as all mills have concluded their processing season. This puts production 18 percent lower than 2018/19 due to sharply reduced sugarcane yields and recovery rates compared with the year prior and recent history. Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) has not yet published an official sugarcane production forecast for 2020/21. Mexico's sugar production is currently projected by USDA to rebound 14 percent in 2020/21 to 6.0 million MT, which would be down 7 percent from 2018/19, but up slightly from the 5-year (2015/16-2019/20) average. Mexico's sugarcane production could still be challenged by lingering effects from drought.

Table 4: Mexico sugar supply and use 2018/19 - 2019/20 and projected 2020/21, September 2020

Items	2018/19	2019/20 (estimate)	2020/21 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	1,395	1,169	812
Production	6,426	5,278	6,000
Imports	85	105	89
Imports for consumption	22	40	24
Imports for sugar-containing product exports, IMMEX 1/, other	63	65	65
Total supply	7,905	6,552	6,901
Disappearance			
Human consumption	4,092	4,153	4,073
For sugar-containing product exports (IMMEX)	460	365	395
Other deliveries and end-of-year statistical adjustment	-20	0	0
Total	4,532	4,518	4,468
Exports	2,204	1,222	1,502
Exports to the United States & Puerto Rico	856	1,183	760
Exports to other countries	1,348	39	742
Total use	6,737	5,740	5,970
Ending stocks	1,169	812	931
	1,000 metric tons, raw value		
Beginning stocks	1,478	1,239	861
Production	6,811	5,595	6,360
Imports	90	111	94
Imports for consumption	23	42	25
Imports for sugar-containing product exports (IMMEX)	67	69	69
Total supply	8,380	6,945	7,315
Disappearance			
Human consumption	4,337	4,402	4,317
For sugar-containing product exports (IMMEX)	488	387	419
Other deliveries and end-of-year statistical adjustment	-21	0	0
Total	4,804	4,789	4,736
Exports	2,337	1,295	1,592
Exports to the United States & Puerto Rico	908	1,254	806
Exports to other countries	1,429	42	787
Total use	7,141	6,084	6,328
Ending stocks	1,239	861	987
Stocks-to-human consumption (percent)	28.6	19.6	22.9
Stocks-to-use (percent)	17.3	14.1	15.6
High-fructose corn syrup (HFCS) consumption (dry weight)	1,528	1,493	1,470

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

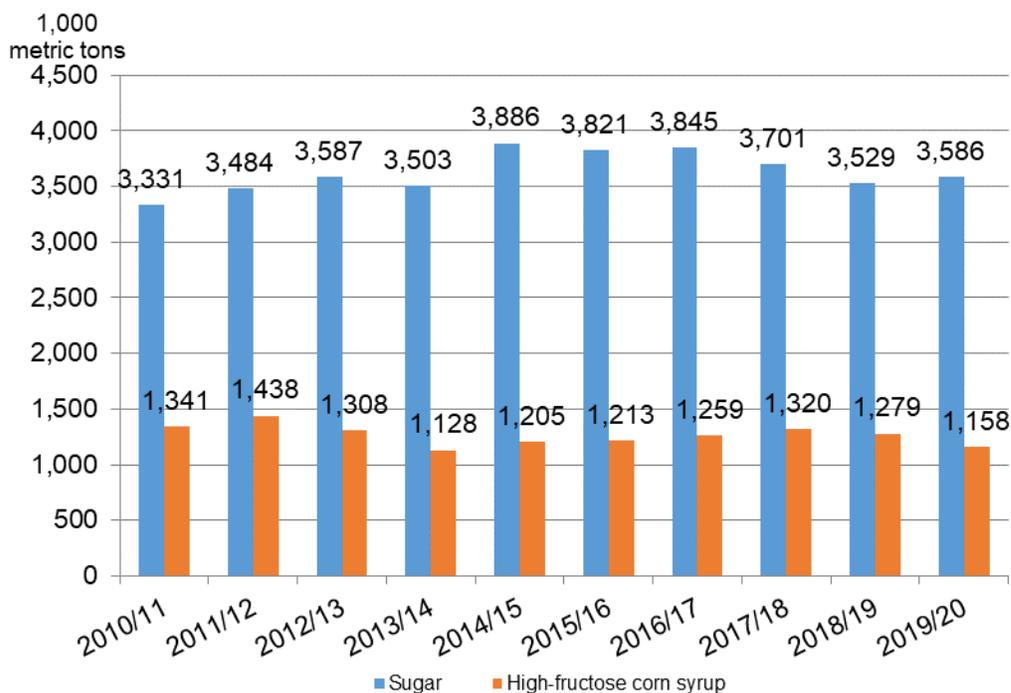
Sources: USDA, *World Agricultural Outlook Board*; USDA, Economic Research Service; CONADESUCA.

Use Forecasts Increase Based on Strong Pace Through June

Total sugar use in Mexico for 2019/20 is estimated at 5.740 million MT, a 9,000-MT increase from the previous month's figure based on stronger deliveries for the *Industria Manufacturera, Maquiladora y de Servicios de Exportación* program (IMMEX), which more than offset slightly reduced exports. Sugar consumption is unchanged from the previous estimate at 4.153 million MT, which is up 61,000 from the previous year.

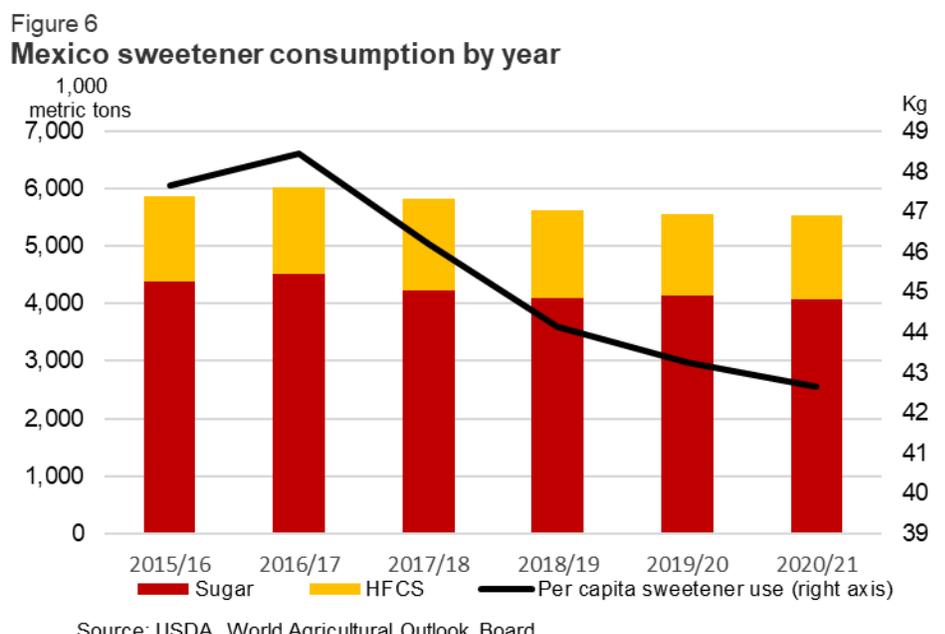
While sugar use is stronger in 2019/20, the opposite dynamic is occurring for High-Fructose Corn Syrup (HFCS). Demand for HFCS is projected at 1.410 million MT, down from the previous forecast of 1.470 million in light of low international sugar prices, a weakening exchange rate with the U.S. dollar, and COVID-19 related consumption effects.

Figure 5
Mexican sweetener consumption October to July, 2010/11 to 2019/20



Source: CONADESUCA.

Total sweetener demand in 2019/20 is projected lower, both from the previous forecast and year to year. The year-to-year reduction in HFCS more than offsets slightly stronger sugar consumption. The 2019/20 per capita sweetener (sugar and HFCS combined) consumption is estimated at 43.24 kg, down slightly from the previous projection of 43.71. Per capita sweetener consumption in 2020/21 is projected at 42.65, which would represent a fourth consecutive year of declining use as health-focused campaigns continue to encourage reduced sweetener intake.



Reduced Exports to the United States

Exports for 2019/20 are estimated at 1.222 million MT, including 1.183 million MT shipped to the United States—both down 11,000 MT from August. Exports for 2020/21 are projected up 5,000 MT to 1.502 million MT. Exports to the United States, however, are sharply lowered 163,000 MT to 760,000 based on the revised calculation of U.S. needs. Consequently, Mexico’s exports to non-U.S. destinations are revised up from the August forecast and projected substantially larger than in 2019/20.

Ending Stocks for 2019/20 Suggest Tight Domestic Market

Mexico’s 2019/20 ending stocks were estimated at 812,000 MT in the September WASDE. This is a 5,000-MT boost from the previous month, as the small increase in projected imports more than offsets marginally higher total use. This keeps Mexico’s projected stocks below the 2½-month consumption target that domestic authorities use to monitor and manage domestic programs. While lower than the target and the past several years—which were markets with ample supplies—the current estimate is still in line with historical levels. If realized, this would be the smallest stocks-to-consumption ratio since 2014/15. Stocks are projected to rebound slightly in 2020/21.

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