



Sugar and Sweeteners Outlook

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U.S. Sugar August 2011

On August 1, 2011, the U.S. Department of Agriculture (USDA) announced the Fiscal Year (FY) 2012 raw and refined sugar tariff-rate quotas (TRQs), an extension of the FY 2012 raw sugar TRQ time period, and an increase in the FY 2011 specialty sugar TRQ. The FY 2012 TRQ for raw cane sugar is set at 1,231,497 short tons, raw value (STRV), or 1,117,195 metric tons, raw value (MTRV), the minimum to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreement on Agriculture. The USDA also announced that sugar entering under this FY 2012 raw sugar TRQ will be permitted to enter U.S. Customs territory beginning September 1, 2011, a month earlier than the usual first entry date of October 1. The USDA established the FY 2012 refined sugar TRQ at 124,251 STRV (112,718 MTRV). Of this quantity, 101,825 STRV (92,374 MTRV) is reserved for the importation of specialty sugars. USDA announced also an increase in the FY 2011 specialty sugar TRQ by 10,000 STRV (9,072 MTRV). This increase is needed to accommodate a rapidly growing processed organic foods sector.

On August 11, 2011, the USDA released its latest U.S. and Mexico sugar supply and use estimates for FY 2011 and projections for FY 2012 in the World Agricultural Supply and Demand Estimates (WASDE) report. For FY 2011, U.S. ending sugar stocks are increased 258,000 STRV, mainly due to higher imports from Mexico that reflect corrected import data for June and a stronger-than-expected pace for the rest of the fiscal year. Projected U.S. sugar supply for FY 2012 is increased 68,000 STRV from last month. Higher beginning stocks more than offset lower production and imports. Production is lowered 80,000 STRV, mainly due to lower-than-expected forecast yields for U.S. sugarbeets and Louisiana sugarcane. Imports are decreased 110,000 STRV as lower imports from Mexico more than offset increased TRQ imports. Total FY 2011 and FY 2012 U.S. sugar use is unchanged.

Contents

- Summary
- Sugar in the NAFTA
- Mexico 2010/11 Sugar
- Production At-A-Glance
- Contacts and Links

Websites

- WASDE
- Sugar Briefing Room

The next release is
September 15, 2011

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Agricultural Outlook Board.

Based on the pace of exports to the United States (1.357 million MTRV through July, according to the U.S. Census Bureau and the Customs Service), estimated exports in Mexico are increased 200,000 MTRV to 1.482 million MTRV. The USDA lowered its estimate of FY 2011 sugar production by 5,000 MTRV to 5.495 million MTRV to reflect final data reporting by the *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar* (CNDSCA). Ending stocks are estimated at 779,000 MTRV, a decrease of 285,000 MTRV from last month. For 2011/12, the USDA decreased beginning stocks to equal 2011/12 ending stocks and kept ending stocks at 953,000 MTRV for a stocks-to-consumption ratio of 22.0 percent. Exports are adjusted residually to balance total use with total supply and are projected at 1.113 million MTRV.

Sugar in the NAFTA

On August 1, 2011, the U.S. Department of Agriculture (USDA) announced the Fiscal Year (FY) 2012 raw and refined sugar tariff-rate quotas (TRQs), an extension of the FY 2012 raw sugar TRQ time period, and an increase in the FY 2011 specialty sugar TRQ. On August 11, 2011, USDA's National Agricultural Statistics Service (NASS) published forecasts for area harvested, crop yields, and production forecasts for both sugarbeets and sugarcane. Also on August 11, 2011, the USDA released its latest U.S. and Mexico sugar supply and use estimates for FY 2011 and projections for FY 2012 in the *World Agricultural Supply and Demand Estimates* (WASDE) report.

Sugar Tariff-Rate Quota Announcements.

The FY 2012 TRQ for raw cane sugar is set at 1,231,497 short tons, raw value (STRV), or 1,117,195 metric tons, raw value (MTRV), the minimum to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreement on Agriculture, pursuant to Additional U.S. Note 5 to Chapter 17 of the U.S. Harmonized Tariff Schedule (HTS) and Section 359k of the Agricultural Adjustment Act of 1938, as amended. Raw cane sugar under this quota must be accompanied by a certificate of quota eligibility (CQE) and may be entered under subheading 1701.11.10 of the HTS until September 30, 2012.

The USDA also announced that sugar entering under this FY 2012 raw sugar TRQ will be permitted to enter U.S. Customs territory beginning September 1, 2011, a month earlier than the usual first entry date of October 1. This action was in response to increased tightness in the U.S. raw cane sugar market.¹ On August 5, 2011, the Office of the U.S. Trade Representative (USTR) allocated this TRQ among supplying countries and customs areas.² Under agreements reached with both Mexico and Taiwan, their customary quota allocations were renounced and re-allocated to the other quota-holding countries.

In addition, USDA is establishing the FY 2012 refined sugar TRQ at 124,251 STRV (112,718 MTRV). Of this quantity, 101,825 STRV (92,374 MTRV) is reserved for the importation of specialty sugars as defined by the USTR. The total refined sugar TRQ includes the 24,251 STRV (22,000 MTRV) minimum to which the United States is committed under the WTO Uruguay Round Agreement on Agriculture, of which 1,825 STRV (1,656 MTRV) is reserved for specialty sugar.³ An agreement was reached with Mexico whereby its customary allocation was renounced for this year and reallocated. USTR allocated 13,283 STRV (12,050 MTRV) of the refined sugar TRQ to Canada and 9,143 STRV (8,294 MTRV) to be administered on a first-come, first-served basis.

The FY 2012 specialty sugar TRQ will be opened in five tranches. (Because the specialty sugar TRQ is first-come, first-served, tranches for specialty sugar are needed to allow for orderly marketing throughout the year.) The first tranche, totaling 1,825 STRV (1,656 MTRV), will open on October 12, 2011. All specialty sugars are eligible for entry under this tranche. The second tranche will open on October 26, 2011 and be equal to 37,000 STRV (33,565 MTRV). The remaining tranches will each be equal to 21,000 STRV (19,051 MTRV), with the third opening on January 11, 2012; the fourth, on April 11, 2012; and the fifth, on July 11, 2012. The second, third, fourth, and fifth tranches will be reserved for organic sugar and other specialty sugars not currently produced commercially in the United States or reasonably available from domestic sources.

USDA also announced an increase in the FY 2011 specialty sugar TRQ by 10,000 STRV (9,072 MTRV). This increase is needed to accommodate a rapidly growing processed organic foods sector. A new tranche opened on August 4, 2011. The August 24, 2011 specialty sugar tranche of 18,229 STRV (16,537 MTRV) will open as previously scheduled.

¹ The ending stocks-to-use ratio for FY 2011 in the WASDE released on August 11, 2011 is now at 15.5 percent.

² <http://www.ustr.gov/about-us/press-office/press-releases/2011/august/us-trade-representative-ron-kirk-announces-fy-2012>

³ Total specialty sugar of 101,825 STRV is the sum of the WTO portion of 1,825 STRV plus an additional 100,000 STRV needed to satisfy additional demand for organic sugar.

Beet Sugar Production

NASS projects 2011/12 area harvested for sugarbeets at 1.217 million acres, a 5.27-percent increase over last year. Almost all growing areas (excepting California) show increases over last year: Red River Valley (Minnesota and North Dakota), 7.18 percent; Great Plains (Colorado, Montana, Nebraska, Wyoming), 3.71 percent; Northwest (Idaho, Oregon), 3.61 percent; and Michigan, 1.36 percent.

As reported last month, producers in the Red River Valley were planting more acreage than originally planned due to expected yield and sucrose losses attributable to later-than-normal planting because of unusually wet field conditions. NASS's August Crop Production shows that Red River Valley area expected to be harvested in Minnesota is 18,000 acres more than forecast in the June Acreage report. In the other beet-producing areas, especially the Great Plains and Northwest, area likely expanded because of expected high crop returns. NASS reported in July that the initially estimated national sugarbeet price for 2010/11 is \$61.70 per ton. This is 22 percent above the preceding year and is a record high.

NASS forecasts national sugarbeet yield at 25.0 tons per acre, a reduction of 9.5 percent compared with last season. Lower yields were centered in the Red River Valley, 22.3 tons per acre, 16.0 percent less than last year; in Michigan, 24.6 tons per acre, 5.4 percent less; and in the Great Plains, 25.8 tons per acre, 4.9 percent less. Michigan, like the Red River Valley, planted much later than usual due to wet conditions. Yields in the Northwest are forecast higher at 32.1 tons per acre, a 2.7-percent increase over last year, and in California at 43.3 tons per acre, a 7.5-percent increase.

NASS forecasts national sugarbeet production at 30.393 million tons, about 4.7 percent lower than last year. Area expansion cannot compensate for lower yields in the Red River Valley (15.675 million tons, 9.9 percent less production than last year), Michigan (3.665 million tons, 4.1 percent less), or in the Great Plains (3.974 million tons, 1.4 percent less). Better production prospects are forecast for the Northwest (6.004 million tons, 6.4 percent higher than last year) and for California (1.075 million tons, a 7.1-percent increase).

The Interagency Commodity Estimates Committee (ICEC) for sugar projects national sugar per acre (sugar yield) at 3.904 STRV per acre. This is about the same level as 2 years ago but 10 percent below last year's September/August record yield of 4.339 tons. Beet sugar production for 2011/12 is, therefore, projected at 4.750 million STRV. This is 50,000 STRV less than the forecast last month.

Cane Sugar Production

The NASS August 2011 *Crop Production* forecasts total sugarcane area, yield, and production for Florida, Louisiana, Texas, and Hawaii. Total sugarcane is divided between sugarcane for sugar and sugarcane for seed. Because NASS does not forecast the sugar-seed split until December, the sugar ICEC applies the same percentages as last year to arrive at its sugarcane for sugar projection.

NASS forecasts area harvest for sugarcane at 889,000 acres, an increase of 1.3 percent above last year. Area projections in all States except Florida are close to those of last year – Florida area harvested is forecast 3.3 percent higher at 405,000 acres.

The USDA projects FY 2012 Florida sugar production at 1.630 million STRV. Although there is concern in Florida regarding extremely dry conditions affecting production, NASS forecasts sugarcane yield at 34.5 tons per acre, slightly above the average yield since FY 2005. Based on the NASS yield forecast, the sugar ICEC projects sugarcane for sugar at 13.331 million tons. Sucrose recovery is expected to rebound from last year's low level caused by the freezes in December and is forecast at 12.23 percent, very close to the average recovery rate since FY 2005. The Florida processors' forecast published in the Farm Service Agency's Sweetener Market Data of 1.666 million STRV is close to the USDA forecast.

The USDA projects FY 2012 Louisiana sugar production at 1.400 million STRV. This projection is 40,000 STRV less than last month's forecast and is also at the same level as FY 2011. Using NASS's forecast sugarcane yield of 28.0 tons per acre, the sugar ICEC projects sugarcane for sugar at 10.920 million tons, only slightly above last year's total. Because FY 2012 sucrose recovery is not likely to surpass last year's relatively high 12.91 percent, production much above last year's total is not likely.

The USDA projects FY 2012 Texas production at 160,000 STRV, 10,000 STRV above last month's projection. Although NASS forecasts 1,100 fewer acres than last year, the yield forecast at 34.9 tons per acre is closer to historical averages and is 4.42 tons per ton more than last year. Hawaii sugar production for FY 2012 is forecast at 170,000 STRV, the same as last month. NASS's Hawaii sugarcane crop forecasts cover only production in calendar year 2011 and are less useful for the upcoming fiscal year.

The FY 2012 cane sugar forecast is 3.360 million STRV. This is 212,000 STRV more than last year and basically attributable to a return to a normal crop in Florida. Summed with beet sugar production, total FY 2012 U.S. sugar production is projected at 8.110 million STRV.

Trade

Forecasts of imports from Mexico for FY 2011 are increased by 220,000 STRV to 1.624 million STRV. Preliminary import data from the U.S. Customs Service indicate that 1.496 million STRV (1.357 million MTRV) of sugar from Mexico has entered into the United States through the end of July.⁴ This amount exceeds the import estimate appearing in the July 2011 WASDE. The USDA expects remaining monthly imports to average about 64,000 STRV for August and September. Imports from Mexico in FY 2012 are projected lower by 235,000 STRV to 1.218 million STRV. The decrease is due to expected supply-demand factors within Mexico (see below).

Raw sugar TRQ imports for FY 2011 are estimated at 1.625 million STRV. Early imports from the FY 2012 raw sugar TRQ in the amount of 40,000 STRV are forecast to enter the United States in September 2011.⁵ The Philippines received a USDA waiver allowing them to ship 21,658 STRV of additional quota allocated earlier in the summer during the first month of FY 2012. These two events together indicate additional raw sugar imports of 18,342 STRV for FY 2012. Additionally, the USDA revised its estimate of raw sugar TRQ shortfall from 87,000 STRV in July to 65,000 STRV in August. Rounding out TRQ adjustments is the additional 10,000 STRV of specialty sugar slated for entry in early August 2011.

FY 2012 sugar TRQ imports were revised upward 125,000 STRV to 1.384 million STRV after the details of the TRQ were announced. Most of the increase is due to the additional 100,000 STRV of specialty sugar allocated under the refined sugar TRQ. Other adjustments to the forecast were made reflecting early FY 2012 TRQ sugar entries in September, FY 2011 TRQ sugar from the Philippines expected to enter in FY 2012, and changes in expected raw sugar shortfall.

Sugar Use

Sugar deliveries for human consumption are unchanged from last month: 11.0 million STRV for FY 2011 and 11.125 million STRV for FY 2012. Also unchanged are sugar exports: 250,000 STRV for FY 2011 and 200,000 STRV for FY 2012; and other deliveries (re-export sugar for sugar-containing products, sugar for polyhydric alcohol, and sugar for livestock feed): 235,000 STRV for FY 2011 and 190,000 STRV for FY 2012.

The net effect of all changes discussed above (plus a small decrease in beginning FY 2011 stocks) is to increase FY 2011 ending-year stocks by 258,330 STRV to 1.785 million STRV, implying an ending-year stocks-to-use ratio of

⁴ Due to an error in U.S. Customs Service trade data last month, the level of sugar imports from Mexico was underestimated by a large amount and led to a decrease in expected sugar imports from Mexico for the rest of the fiscal year in the July 2011 WASDE.

⁵ See the first section of this report for details allowing early entry of FY 2012 raw sugar TRQ imports.

15.5 percent. Ending stocks for FY 2012 are increased 50,000 STRV (higher beginning stocks offsetting lower production and imports) to 1.324 million STRV, implying a stocks-to-use ratio of 11.7 percent.

Prices

U.S. sugar prices have remained above historical levels. From January 2011 through the end of July, raw sugar prices (nearby Intercontinental Exchange (ICE) futures contract no. 16) averaged 37.82 cents per pound. The average for July, at 37.93 cents per pound, was close to the first half-year average. The margin between the U.S. raw sugar price and the world raw sugar price (ICE futures contract no. 11) averaged 8.46 cents during July. The average for August through the 11th is up to 11.00 cents.

The beet sugar price (low end of Midwest range from the Milling and Baking News) averaged 55.17 cents per pound the first half of 2011 and 55.40 cents per pound in July. Since the end of July, the low end of the range has been 57 cents per pound.

Sugar in Mexico

Based on the pace of exports to the United States (1.357 million MTRV through July, according to the U.S. Census Bureau and the Customs Service), estimated exports are increased 200,000 MTRV to 1.482 million MTRV. The USDA revised its timing of entries of the recently announced Mexican sugar TRQ of 159,000 MTRV (150,000 metric tons, *tel quel*). In the July 2011 WASDE, the USDA showed all of this amount entering by the end of FY 2011. In the August 2011 WASDE, half enters in FY 2011 and the other half in FY 2012. The USDA lowered its estimate of FY 2011 sugar production by 5,000 MTRV to 5.495 million MTRV to reflect final data reporting by the *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar (CNDSCA)*. Ending stocks are estimated at 778,000 MTRV, a decrease of 285,000 MTRV from last month. The stocks-to-consumption ratio is estimated at 18.2 percent, down from 20.5 percent last month. Consistent with tightening market conditions, sugar prices in Mexico have been increasing; 50-kilogram bags of *estandar* sugar in Mexico City were selling at 533 pesos at the beginning of July and in the first week of August are selling at 632 pesos, a 15.7 percent increase. Corresponding prices for *refinado* sugar are 581.67 pesos at the beginning of July and 670 pesos the first week of August. Increases have been steady each week. The effect of the recent sugar TRQ increase has not been evident so far.

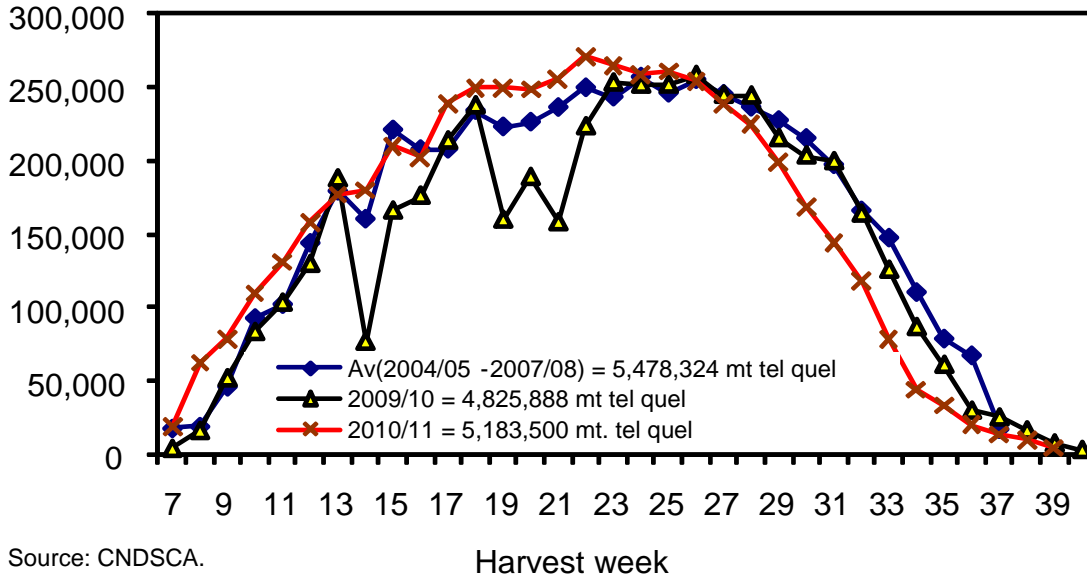
For 2011/12, the USDA decreased beginning stocks to 779,000 MTRV and kept ending stocks at 953,000 MTRV for a stocks-to-consumption ratio of 22.0 percent. Exports are adjusted residually to balance total use with total supply and are projected at 1.113 million MTRV. The USDA did not change its production forecast of 5.650 million MTRV (5.330 million tones, *tel quel*). Most commentators have been pessimistic about 2011/12 production prospects – most predict substantially less production than in 2010/11. The CNDSCA has not announced its forecast yet. The USDA notes that rainfall from January 1 through early August in the primary growing areas of Veracruz and the western areas of Mexico is at or above average. Total rainfall in Veracruz has been greater than the same period in 2010. Reservoir levels in all regions except the northwest (where little sugarcane is grown) are at levels close to those of a year earlier.

Mexico 2010/11 Sugar Production At-A-Glance

Figure 1

Sugar production, by week of harvest, 2004/05-2010/11

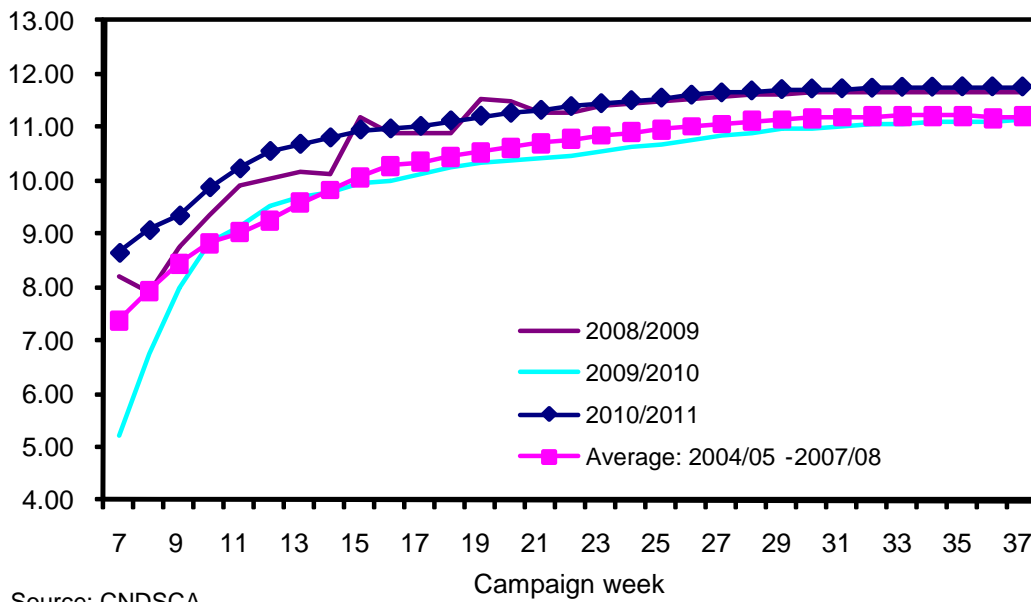
Metric tons



Source: CNDSCA.

Figure 2

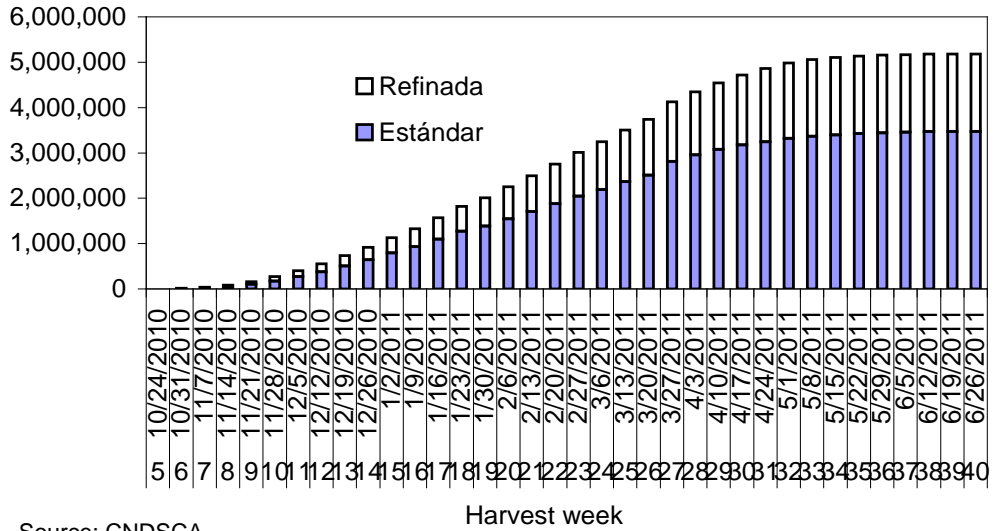
Intra-seasonal, cumulative sugar recovery rates in Mexico, recent crop years



Source: CNDSCA.

Figure 3

Cumulative sugar production in Mexico, 2010/11, estandar and refinado
Metric tons, tel quel



Source: CNDSCA.

Figure 4

Sugar in Mexico, by type of sugar, 2010/11

Total sugar production = 5,183,500 tonnes

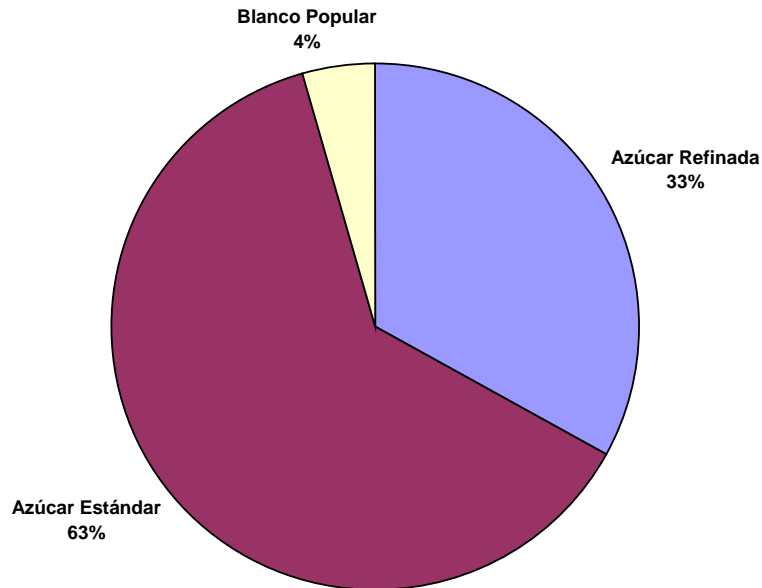
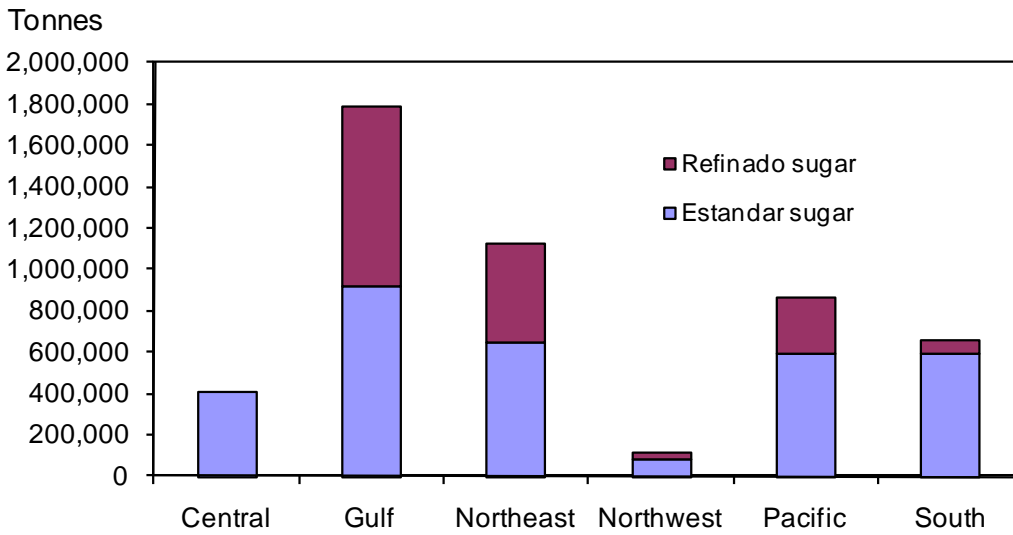


Figure 5

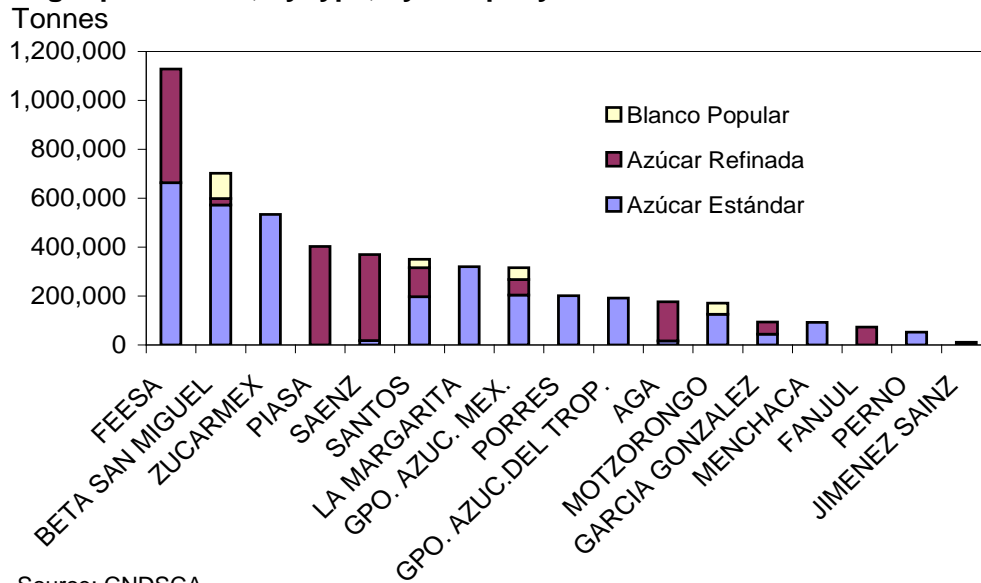
Sugar production in Mexico, by region, by type of sugar, 2010/11



Source: CNDSCA.

Figure 6

Sugar production, by type, by company



Source: CNDSCA.

Table 1--U.S. sugar: supply and use, by fiscal year 1/, 8/16/11

Items	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
	<i>1,000 short tons, raw value</i>											
Beginning stocks 2/	2,216	2,180	1,528	1,670	1,897	1,332	1,698	1,799	1,664	1,534	1,498	1,785
Total production 3/ 4/	8,769	7,900	8,426	8,649	7,876	7,399	8,445	8,152	7,531	7,963	7,946	8,110
Beet sugar	4,680	3,915	4,462	4,692	4,611	4,444	5,008	4,721	4,214	4,575	4,800	4,750
Cane sugar	4,089	3,985	3,964	3,957	3,265	2,955	3,438	3,431	3,317	3,387	3,146	3,360
Florida	2,057	1,980	2,129	2,154	1,693	1,367	1,719	1,645	1,577	1,646	1,433	1,630
Louisiana	1,585	1,580	1,367	1,377	1,157	1,190	1,320	1,446	1,397	1,469	1,400	1,400
Texas	206	174	191	175	158	175	177	158	152	112	143	160
Hawaii	241	251	276	251	258	223	222	182	192	161	170	170
Puerto Rico	0	0	0	0	0	0	0	0	0	0	0	0
Total imports	1,590	1,535	1,730	1,750	2,100	3,443	2,080	2,620	3,082	3,319	3,826	2,962
Tariff-rate quota imports 5/	1,277	1,158	1,210	1,226	1,408	2,588	1,624	1,354	1,370	1,854	1,882	1,384
Other program Imports	238	296	488	464	500	349	390	565	308	450	300	350
Non-program imports	76	81	32	60	192	506	66	701	1,404	1,014	1,644	1,228
Mexico 6/							60	694	1,402	807	1,624	1,218
Total Supply	12,575	11,615	11,684	12,070	11,873	12,174	12,223	12,571	12,277	12,816	13,270	12,857
Total exports 3/	141	137	142	288	259	203	422	203	136	211	250	200
Quota-exempt for reexport	141	137	142	288	259	203	422	203	136	211	250	200
Other exports	0	0	0	0	0	0	0	0	0	-45	0	0
CCC disposal, for export	0	0	0	0	0	0	0	0	0	0	0	0
Miscellaneous	123	-24	161	23	94	-67	-132	0	0	-45	0	0
CCC disposal, for domestic non-food use	10	0	0	0	0	0	0	0	0	0	0	0
Refining loss adjustment	0	0	0	0	0	0	0	0	0	-45	0	0
Statistical adjustment 7/	113	-24	161	23	94	-67	-132	0	0	0	0	0
Deliveries for domestic use	10,132	9,974	9,711	9,862	10,188	10,340	10,135	10,704	10,607	11,152	11,235	11,315
Transfer to sugar-cont. products												
for exports under reexport program	98	156	183	142	121	106	169	141	120	201	195	150
Transfer to polyhydric alcohol, feed	33	33	24	41	48	51	53	61	46	35	40	40
Deliveries for domestic food and beverage use 8/	10,000	9,785	9,504	9,678	10,019	10,184	9,913	10,501	10,441	10,917	11,000	11,125
Total use	10,396	10,087	10,014	10,172	10,542	10,476	10,424	10,907	10,743	11,318	11,485	11,515
Ending stocks 2/	2,180	1,528	1,670	1,897	1,332	1,698	1,799	1,664	1,534	1,498	1,785	1,342
Privately owned	1,395	1,316										
CCC	784	212										
	<i>Percent</i>											
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24	15.55	11.66

NOTE: Numbers may not add due to rounding.

1/ Fiscal year beginning October 1. 2/ Stocks in hands of primary distributors and CCC. 3/ Historical data are from FSA (formerly ASCS), *Sweetener**Market Data* (SMD), and NASS, Sugar Market Statistics prior to 1992. 4/ Production reflects processors' projections compiled by the Farm Service Agency.

5/ Actual arrivals under the tariff-rate quota (TRQ) with late entries, early entries, and (TRQ) overfills assigned to the fiscal year in which they actually arrived.

The 2010/11 available TRQ assumes a raw sugar shortfall of 65,000 tons. 6/ Starting in 2007/08, total includes imports under Mexico's WTO TRQ allocation for raw and refined sugar. 7/ Calculated as a residual. Largely consists of invisible stocks change.

8/ For FY 2008-09, combines SMD deliveries for domestic human use, SMD miscellaneous uses, and the difference between SMD imports and *World Supply and Demand Estimates* imports.

Table 2 --U.S. sugar: supply and use (including Puerto Rico), fiscal years, metric tonnes, 8/16/11

Items	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12
<i>1,000 metric tons, raw value</i>												
Beginning stocks 2/	2,010	1,977	1,386	1,515	1,721	1,208	1,540	1,632	1,510	1,392	1,359	1,620
Total production 3/ 4/	7,955	7,167	7,644	7,846	7,145	6,712	7,662	7,396	6,832	7,224	7,209	7,357
Beet sugar	4,245	3,552	4,048	4,257	4,183	4,032	4,543	4,283	3,822	4,151	4,354	4,309
Cane sugar	3,710	3,615	3,596	3,590	2,962	2,681	3,119	3,113	3,009	3,073	2,854	3,048
Florida	1,866	1,796	1,932	1,954	1,536	1,240	1,559	1,492	1,431	1,493	1,300	1,479
Louisiana	1,438	1,433	1,240	1,249	1,049	1,079	1,198	1,312	1,267	1,332	1,270	1,270
Texas	187	158	173	159	143	159	161	143	138	101	130	145
Hawaii	219	227	251	228	234	202	201	165	174	146	154	154
Puerto Rico	0	0	0	0	0	0	0	0	0	0	0	0
Total imports	1,443	1,393	1,570	1,588	1,905	3,124	1,887	2,377	2,796	3,011	3,471	2,687
Tariff-rate quota imports 5/	1,158	1,051	1,098	1,113	1,277	2,348	1,473	1,229	1,243	1,682	1,707	1,256
Other program imports	216	269	443	421	454	317	354	513	279	408	272	318
Non-program imports	69	73	29	54	174	459	60	636	1,274	920	1,491	1,114
Mexico 6/												
Total supply	11,408	10,537	10,599	10,949	10,771	11,044	11,088	11,404	11,138	11,626	12,039	11,664
Total exports 3/	128	125	129	261	235	184	383	184	123	191	227	181
Quota-exempt for reexport	128	125	129	261	235	184	383	184	123	191	227	181
Other exports	0	0	0	0	0	0	0	0	0	0	0	0
CCC disposal, for export	0	0	0	0	0	0	0	0	0	0	0	0
Miscellaneous	112	-22	146	20	85	-61	-120	0	0	-41	0	0
CCC disposal, for domestic non-food use	9	0	0	0	0	0	0	0	0	0	0	0
Refining loss adjustment	0	0	0	0	0	0	0	0	0	-41	0	0
Statistical adjustment 7/	103	-22	146	20	85	-61	-120	0	0	0	0	0
Deliveries for domestic use	9,191	9,048	8,810	8,946	9,243	9,381	9,194	9,710	9,623	10,117	10,192	10,265
Transfer to sugar-cont. products												
for exports under reexport program	89	141	166	129	110	96	153	128	109	183	177	136
Transfer to polyhydric alcohol, feed	30	30	22	38	44	46	48	56	42	31	36	36
Deliveries for domestic food and beverage use 8/	9,072	8,877	8,622	8,780	9,089	9,239	8,993	9,527	9,472	9,903	9,979	10,092
Total use	9,431	9,151	9,084	9,228	9,563	9,504	9,457	9,895	9,746	10,267	10,419	10,446
Ending stocks 2/	1,977	1,386	1,515	1,721	1,208	1,540	1,632	1,510	1,392	1,359	1,620	1,218
Privately owned	1,266	1,194										
CCC	711	192										
<i>Percent</i>												
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24	15.55	11.66

NOTE: Numbers may not add due to rounding.

1/ Fiscal year beginning October 1. 2/ Stocks in hands of primary distributors and CCC. 3/ Historical data are from FSA (Farm Service Agency), *Sweetener**Market Data* (SMD), and NASS, Sugar Market Statistics prior to 1992. 4/ Production reflects processors' projections compiled by the Farm Service Agency.

5/ Actual arrivals under the tariff-rate quota (TRQ) with late entries, early entries, and (TRQ) overfills assigned to the fiscal year in which they actually arrived.

The 2010/11 available TRQ assumes a raw sugar shortfall of 58,967 tonnes. 6/ Starting in 2007/08, total includes imports under Mexico's WTO (World Trade Organization)

TRQ allocation for raw and refined sugar. 7/ Calculated as a residual. Largely consists of invisible stocks change.

8/ For FY 2008-09, combines SMD deliveries for domestic human use, SMD miscellaneous uses, and the difference between SMD imports and

World Agricultural Supply and Demand Estimates imports.

Table 3--Mexico: sugar production and supply, and sugar and HFCS utilization, 8/16/2011

Fiscal Year (Oct/Sept)	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011 1/	2012 1/
1,000 metric tons, raw value																	
Beginning stocks	1,587	1,403	1,055	991	941	1,063	1,548	1,172	1,194	1,237	1,965	1,294	1,718	1,975	624	973	778
Production	4,642	4,818	5,486	4,982	4,979	5,220	5,169	5,229	5,330	6,149	5,604	5,633	5,852	5,260	5,115	5,495	5,650
Imports	234	191	31	41	37	43	52	63	327	268	240	474	226	160	861	392	270
Supply	6,463	6,412	6,572	6,014	5,957	6,326	6,769	6,464	6,851	7,654	7,809	7,401	7,796	7,395	6,600	6,860	6,698
Disappearance																	
Human consumption	4,343	4,301	4,391	4,422	4,445	4,481	5,004	5,097	5,380	5,279	5,326	5,133	5,090	5,065	4,615	4,277	4,332
Other cons.	71	90	114	127	131	142	180	135	220	282	323	390	414	475	302	323	300
Miscellaneous													-360	-136	-27		
Total	4,414	4,391	4,505	4,549	4,576	4,623	5,184	5,232	5,600	5,561	5,649	5,523	5,144	5,404	4,890	4,600	4,632
Exports	646	966	1,076	524	318	155	413	38	14	128	866	160	677	1,367	737	1,482	1,113
Total use	5,060	5,357	5,581	5,073	4,894	4,778	5,597	5,270	5,614	5,689	6,515	5,683	5,821	6,771	5,627	6,082	5,745
Ending stocks	1,403	1,055	991	941	1,063	1,548	1,172	1,194	1,237	1,965	1,294	1,718	1,975	624	973	778	953
1,000 metric tons, tel quel/actual weight																	
Beginning stocks	1,497	1,324	995	935	888	1,003	1,460	1,106	1,126	1,167	1,854	1,221	1,621	1,863	589	918	734
Production	4,379	4,545	5,175	4,700	4,697	4,925	4,876	4,933	5,028	5,801	5,287	5,314	5,521	4,962	4,825	5,184	5,330
Imports	221	180	29	39	35	41	49	59	308	253	226	447	213	151	812	370	255
Supply	6,097	6,049	6,200	5,674	5,620	5,968	6,386	6,098	6,463	7,221	7,367	6,983	7,355	6,976	6,226	6,471	6,318
Disappearance																	
Human consumption	4,097	4,058	4,142	4,172	4,193	4,227	4,721	4,808	5,075	4,980	5,025	4,843	4,802	4,778	4,354	4,035	4,087
Other cons.	67	85	108	120	124	134	170	127	208	266	305	368	391	448	285	305	283
Miscellaneous													-340	-128	-25		
Total	4,164	4,142	4,250	4,292	4,317	4,361	4,891	4,936	5,283	5,246	5,329	5,211	4,853	5,098	4,613	4,340	4,370
Exports	609	911	1,015	494	300	146	390	36	13	120	817	151	639	1,290	695	1,398	1,050
Total use	4,774	5,054	5,265	4,786	4,617	4,508	5,280	4,972	5,296	5,367	6,146	5,362	5,492	6,388	5,308	5,738	5,420
Ending stocks	1,324	995	935	888	1,003	1,460	1,106	1,126	1,167	1,854	1,221	1,621	1,863	589	918	734	899
Stocks-to-human cons.	32.3	24.5	22.6	21.3	23.9	34.5	23.4	23.4	23.0	37.2	24.3	33.5	38.8	12.3	21.1	18.2	22.0
Stocks-to-use	27.7	19.7	17.8	18.5	21.7	32.4	20.9	22.7	22.0	34.6	19.9	30.2	33.9	9.2	17.3	12.8	16.6
HFCS cons. (dry weight)	116	402	409	480	580	600	263	130	135	355	667	698	782	653	1,418	1,600	1,609

1/ Forecast

Source: USDA, FAS, PSD database (historical data); USDA, WASDE (forecast data).

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