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A banner for the USDA's 94th Annual Agricultural Outlook Forum. The top section is a dark green bar with the USDA logo and name. Below this, the text "USDA's 94th Annual" is stacked vertically on the left. To the right, "Agricultural Outlook Forum" is written in a large, bold, sans-serif font. Below that, "THE ROOTS OF PROSPERITY" is written in a large, stylized, serif font. The background of the banner shows a field of crops with a tree in the foreground. At the bottom, a dark bar contains the event details: "February 22-23, 2018 • Crystal Gateway Marriott Hotel, Arlington, Virginia".

USDA's  
94th  
Annual

USDA United States Department of Agriculture

**Agricultural Outlook Forum**

**THE ROOTS OF PROSPERITY**

February 22-23, 2018 • Crystal Gateway Marriott Hotel, Arlington, Virginia

# Sugar Outlook

Friday, February 23, 2018

[www.usda.gov/oc/forum](http://www.usda.gov/oc/forum)

**2018/19 U.S. SUGAR SUPPLY AND USE<sup>1</sup>**

**Michael McConnell, Economic Research Service, USDA**

**Basis for projecting 2018/19 supply and demand:**

- o Projections of supply and demand are based on analyses by the Interagency Commodity Estimates Committee (ICEC) for sugar.

**Key results for 2018/19:**

- o Beginning stocks are 1.842 million short tons, raw value (STRV), a decrease of 34,000 STRV relative to 2017/18.
- o Beet sugar production is projected at 4.992 million STRV. Sugarbeet planted area is projected to increase by about 42,000 acres in 2018/19, as returns to sugarbeets continue to improve relative to alternative crops. Sugarbeet yields and sugar content are reduced from current 2017/18 projections, in line with long-term trends.
- o Cane sugar production is projected at 3.961 million STRV. Production in Florida is projected to increase, recovering from detrimental weather conditions during the 2017/18 harvest season. Louisiana production is projected to decline from the record production in 2017/18, but remains large by historical standards. Texas production is projected to continue its recovery over the past few years.
- o Total imports are projected to total 3.620 million STRV. Imports under tariff-rate quota programs are projected to total 1.548 million STRV—including a 99,000 STRV shortfall in the WTO raw sugar TRQ. Sugar imports from Mexico are projected at 1.812 million STRV, a substantial increase from 2017/18. Imports from Mexico are projected to be constrained by available sugar supplies, rather than the terms of the suspension agreements signed between the U.S. Department of Commerce and the Government of Mexico. Mexico is projected to produce about 6.200 million metric tons, actual value in 2018/19.
- o Deliveries for human consumption are projected at 12.550 million STRV, a 1.8 percent increase over 2017/18 projections, in line with population growth and longer-term trends in per capita sweetener consumption.
- o Ending stocks total 1.610 million STRV. The ending 2018/19 year stocks-to-use ratio is 12.6 percent.

**2018 USDA Agricultural Outlook Forum, Sweeteners Session  
February 23, 2018**

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<sup>1</sup>Approved by the Interagency Commodity Estimates Committee for sugar.

U.S. Sugar Supply and Use 1/

| Item                        | 2017/18 |         |          |            |
|-----------------------------|---------|---------|----------|------------|
|                             | 2016/17 | January | February | Projection |
| 1,000 short tons, raw value |         |         |          |            |
| Beginning stocks            | 2,054   | 1,851   | 1,876    | 1,842      |
| Production 2/               | 8,970   | 9,312   | 9,230    | 8,953      |
| Beet sugar                  | 5,103   | 5,257   | 5,219    | 4,992      |
| Cane sugar                  | 3,867   | 4,055   | 4,011    | 3,961      |
| Florida                     | 2,055   | 2,075   | 1,992    | 2,075      |
| Hawaii                      | 43      | 0       | 0        | 0          |
| Louisiana                   | 1,628   | 1,820   | 1,857    | 1,721      |
| Texas                       | 140     | 160     | 160      | 165        |
| Imports                     | 3,244   | 3,316   | 3,316    | 3,620      |
| TRQ 3/                      | 1,611   | 1,788   | 1,788    | 1,522      |
| Other program 4/            | 419     | 250     | 250      | 250        |
| Other 5/                    | 1,213   | 1,278   | 1,278    | 1,822      |
| Mexico                      | 1,201   | 1,268   | 1,268    | 1,812      |
| Total supply                | 14,267  | 14,479  | 14,422   | 14,415     |
| Exports 2/                  | 95      | 100     | 100      | 100        |
| Deliveries 2/               | 12,258  | 12,555  | 12,480   | 12,705     |
| Food                        | 12,102  | 12,400  | 12,325   | 12,550     |
| Other 6/                    | 156     | 155     | 155      | 155        |
| Miscellaneous               | 38      | 0       | 0        | 0          |
| Total use                   | 12,391  | 12,655  | 12,580   | 12,805     |
| Ending stocks               | 1,876   | 1,824   | 1,842    | 1,610      |
| Stocks to use ratio         | 15.1    | 14.4    | 14.6     | 12.6       |

1/ Fiscal years beginning Oct 1. Historical data are from FSA, "Sweetener Market Data" except imports (U.S. Customs Service, Census Bureau). 2/ Projections for 2017/18 are from the Interagency Commodity Estimates Committee for sugar. 3/ 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. 4/ Includes sugar under the re-export and polyhydric alcohol programs. 5/ Includes high-tier, Mexico, and other. 6/ Transfers to sugar-containing products for reexport, and for nonedible alcohol/ethanol and feed.