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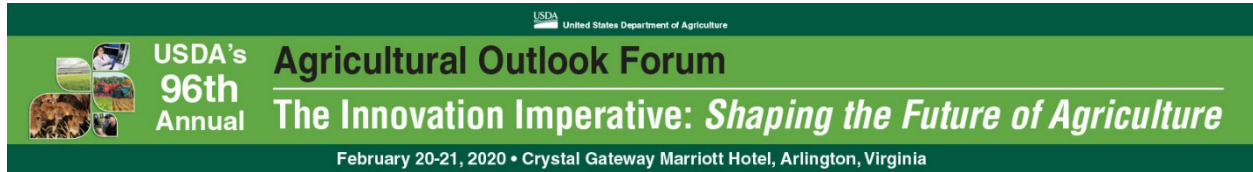
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# Sugar Outlook

Friday, February 21, 2020

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

**2020/21 U.S. SUGAR SUPPLY AND USE<sup>1</sup>**

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

**Basis for projecting 2020/21 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 2020/21:**

- o Beginning stocks are 1.516 million short tons, raw value (STRV), a decrease of 266,000 STRV relative to 2019/20.
- o Beet sugar production is projected at 5.312 million STRV. Sugarbeet planted area is projected to increase 146,000 acres in 2020/21 from the weather-affected 2019/20 crop. Sugarbeet yields and sugar content are expected to return to trend levels from the current 2019/20 projections.
- o Cane sugar production is projected at 4.131 million STRV. Production in Florida is projected to continue increasing annually. Louisiana production is projected to recover from the decline seen in 2019/20. Texas production is projected to rebound, as well, from current projections for 2019/20.
- o Total imports are projected to total 2.995 million STRV. Imports under tariff-rate quota programs are projected to total 1.583 million STRV—including a 99,000 STRV shortfall in the WTO raw sugar TRQ. Sugar imports from Mexico are projected at 1.008 million STRV, a 41.2-percent decline from the projection for 2019/20. Mexico is projected to produce about 6.178 million metric tons, actual value in 2020/21, recovering from the drought-affected 2019/20 crop.
- o Deliveries for human consumption are projected at 12.260 million STRV, a 0.2 percent increase over the current 2019/20 projections.
- o Ending stocks total 1.660 million STRV and the stocks-to-use ratio is 13.5 percent.

**2020 USDA Agricultural Outlook Forum, Sweeteners Session  
February 21, 2020**

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

U.S. Sugar Supply and Use 1/

| Item                        | 2018/19 | 2019/20 |          | 2020/21    |
|-----------------------------|---------|---------|----------|------------|
|                             |         | January | February | Projection |
| 1,000 short tons, raw value |         |         |          |            |
| Beginning stocks            | 2,008   | 1,783   | 1,783    | 1,516      |
| Production 2/               | 8,999   | 8,158   | 8,158    | 9,444      |
| Beet sugar                  | 4,939   | 4,444   | 4,444    | 5,312      |
| Cane sugar                  | 4,060   | 3,713   | 3,713    | 4,131      |
| Florida                     | 2,005   | 2,069   | 2,069    | 2,105      |
| Hawaii                      | 0       | 0       | 0        | 0          |
| Louisiana                   | 1,907   | 1,513   | 1,513    | 1,876      |
| Texas                       | 147     | 131     | 131      | 150        |
| Imports                     | 3,070   | 3,881   | 3,841    | 2,995      |
| TRQ 3/                      | 1,541   | 1,604   | 1,674    | 1,583      |
| Other program 4/            | 438     | 350     | 350      | 350        |
| Other 5/                    | 1,092   | 1,927   | 1,817    | 1,062      |
| Mexico                      | 1,000   | 1,827   | 1,717    | 1,009      |
| Total supply                | 14,077  | 13,821  | 13,781   | 13,955     |
| Exports 2/                  | 35      | 35      | 35       | 35         |
| Deliveries 2/               | 12,231  | 12,230  | 12,230   | 12,260     |
| Food                        | 12,106  | 12,125  | 12,125   | 12,155     |
| Other 6/                    | 126     | 105     | 105      | 105        |
| Miscellaneous               | 27      | 0       | 0        | 0          |
| Total use                   | 12,294  | 12,265  | 12,265   | 12,295     |
| Ending stocks               | 1,783   | 1,556   | 1,516    | 1,660      |
| Stocks to use ratio         | 14.5    | 12.7    | 12.4     | 13.5       |

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 2019/20 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.