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United States Department of Agriculture



USDA's Agricultural Outlook Forum
97th Annual ***Building on Innovation:
A Pathway to Resilience***

2021/22 U.S. SUGAR SUPPLY AND USE¹

Basis for projecting 2021/22 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 2021/22:

- o Beginning stocks are 1.993 million STRV, up 375 thousand STRV from 2020/21.
- o After publication of the March 2021 WASDE report, the 2020/21 Mexican Export Limit is likely to be adjusted which could affect 2021/22 beginning stocks.
- o Beet sugar production is projected at 5.154 million STRV. Compared to the 2020/21 crop, sugarbeet planted area is up slightly, sugarbeet yield is slightly higher, and beet sugar recovery rate is slightly lower.
- o Cane sugar production is projected at 4.245 million STRV. Production in Florida is projected to drop below the record in 2020/21. Louisiana is expected to increase to a new record level with acreage expanding. Texas production is projected to rebound from current projections for 2020/21.
- o Total imports are projected to total 2,758 million STRV. Imports under tariff-rate quota programs are projected to total 1.597 million STRV—including a 99,000 STRV shortfall in the WTO raw sugar TRQ. Sugar imports from Mexico are projected at 735 thousand STRV, 37 percent lower than the projection for 2020/21. Mexico is projected to produce about 6.228 million metric tons, actual value in 2021/22, an increase from recent years mainly based on higher acreage.
- o Deliveries for human consumption are projected at 12.300 million STRV, a 0.8 percent increase over the current 2020/21 projections.
- o Ending stocks total 1.679 million STRV and the stocks-to-use ratio is 13.5 percent.

¹Approved by the Interagency Commodity Estimates Committee for sugar.

U.S. Sugar Supply and Use 1/

| | 2019/20 | 2020/21 | | 2021/22 |
|------------------------------------|---------|---------|----------|------------|
| | | January | February | Projection |
| <i>1,000 Short Tons, raw value</i> | | | | |
| Beginning Stocks | 1,783 | 1,618 | 1,618 | 1,993 |
| Production 2/ | 8,149 | 9,156 | 9,312 | 9,399 |
| Beet Sugar | 4,351 | 4,992 | 5,046 | 5,154 |
| Cane Sugar | 3,798 | 4,163 | 4,265 | 4,245 |
| Florida | 2,106 | 2,135 | 2,200 | 2,150 |
| Hawaii | - | - | - | - |
| Louisiana | 1,566 | 1,886 | 1,931 | 1,945 |
| Texas | 126 | 142 | 134 | 150 |
| Imports | 4,235 | 3,344 | 3,404 | 2,728 |
| TRQ 3/ | 2,152 | 1,721 | 1,721 | 1,597 |
| Other Program 4/ | 432 | 350 | 350 | 350 |
| Other 5/ | 1,651 | 1,273 | 1,333 | 781 |
| Mexico | 1,376 | 1,163 | 1,163 | 735 |
| Total Supply | 14,166 | 14,117 | 14,333 | 14,119 |
| Exports | 61 | 35 | 35 | 35 |
| Deliveries | 12,414 | 12,305 | 12,305 | 12,405 |
| Food | 12,316 | 12,200 | 12,200 | 12,300 |
| Other 6/ | 98 | 105 | 105 | 105 |
| Miscellaneous | 74 | - | - | |
| Total Use | 12,549 | 12,340 | 12,340 | 12,440 |
| Ending Stocks | 1,618 | 1,777 | 1,993 | 1,679 |
| Stocks to Use Ratio | 12.9 | 14.4 | 16.1 | 13.5 |

1/ Fiscal years beginning Oct 1. Historical data are from USDA's "Sweetener Market Data" report. 2/ Production projections for 2020/21 and 2021/22 are based on Crop Production and/or processor projections/industry data and/or sugar ICEC analysis where appropriate. 3/ For 2020/21, WTO raw sugar TRQ shortfall (99) and for 2021/22 (99). 4/ Composed of sugar under the re-export and polyhydric alcohol programs. 5/ Imports from Mexico; and high-tier tariff sugar and syrups not otherwise specified -- for 2019/20 (275), 2020/21 (170), and 2021/22(46). 6/ Transfers to sugar-containing products for re-export and for livestock feed and nonedible alcohol/ethanol.