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USDA United States Department of Agriculture

 **USDA's 96th Annual** **Agricultural Outlook Forum**  
**The Innovation Imperative: *Shaping the Future of Agriculture***

February 20-21, 2020 • Crystal Gateway Marriott Hotel, Arlington, Virginia

# 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.