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Sugar and Sweeteners Outlook

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The next release is October 17, 2011

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U.S. Sugar September 2011

On September 12, 2011, the USDA released its latest U.S. and Mexico sugar supply and use estimates for fiscal year (FY) 2011 and projections for FY 2012 in the *World Agricultural Supply and Demand Estimates* (WASDE) report. For FY 2011, the USDA increased its estimate of tariff-rate quota (TRQ) shortfall and accounted for early entry of imports from the FY 2012 raw sugar TRQ and deferral of some FY 2011 raw sugar TRQ imports until the first month of the next fiscal year. For FY 2012, the USDA reduced its projection of beet sugar production to 4.575 million short tons, raw value (STRV), a reduction of 175,000 STRV, or 3.7 percent, compared with last month's projection. The reduction was made in response to lower sugarbeet production forecasts by the National Agricultural Statistics Service (NASS). NASS forecast sugarbeet production at 29.180 million tons, a reduction of 1.213 million tons, or 4.0 percent compared with last month's forecast. NASS cited wet field conditions, along with disease and hail damage, in half of the sugarbeet growing areas as reasons for reduced production prospects. No change was made to the FY 2012 cane sugar production forecast. Trade and total use projections remained the same as last month's as well. Ending stocks projected for FY 2012 are decreased 215,000 STRV (lower beet sugar production combined with fewer beginning stocks) to 1.127 million STRV. The implied stocks-to-use ratio is 9.8 percent, a drop of 1.9 percentage points from last month. Supply and use estimates and forecasts in Mexico remained the same as those for last month.

Sugar in the North American Free Trade Agreement Area (NAFTA)

On September 12, 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 September 12, 2011, the USDA released its latest U.S. and Mexico sugar supply and use estimates for fiscal year (FY) 2011 and projections for FY 2012 in the *World Agricultural Supply and Demand Estimates* (WASDE) report.

Beet Sugar Production

The USDA reduced its projection of FY 2012 beet sugar production to 4.575 million short tons, raw value (STRV), a reduction of 175,000 STRV, or 3.7 percent compared with last month's projection. In the September 2011 *Crop Report*, NASS projected national sugarbeet production at 29.180 million tons, a reduction of 1.213 million tons, or 4.0 percent, compared with last month's forecast. NASS cited wet field conditions, along with disease and hail damage, in half of the sugarbeet growing areas as reasons for reduced production prospects.

National sugarbeet yield is forecast at 24.2 tons per acre. Although this yield forecast is close to the average national yield since 2001/01 of 24.1 tons per acre, it is far below yields since 2006/07. Figure 1 shows national sugarbeet yields since 2000/01. Better seed varieties, designed to minimize disease and pest losses, were responsible for enhanced yields starting in 2006/07. Annual yields since 2006/07 have averaged 26.4 tons per acre, compared with 22.1 tons for 2000/01-2005/06. Yields in the latter period were not only larger but also about 49 percent less variable.[1] These factors highlight the degree to which the 2011/12 forecast yield deviates from recent trends. If the forecast yield of 24.2 tons for 2011/12 is realized, it would be about 1.6 standard deviations below the calculated mean for the period since 2006/07. This would be the largest deviation from average for the entire period since 2000/01.

Most of the sugarbeet production reduction was centered in the Red River Valley producing States of Minnesota and North Dakota (fig. 2). Production there is forecast at 14.553 million tons, about 7.2 percent less than last month's forecast and 16.4 percent less than last year's production of 17.402 million tons. Although area for harvest in the Red River Valley is forecast to increase 38,000 acres over last year to 693,000 acres, yield is forecast at only 21.0 tons per acre, about 21 percent less than last year's record yield of 26.6 tons per acre. Poor growing conditions for the entire season have hampered plant development and will cause the harvest season to begin later than originally expected. A late start increases the likelihood of hard freezes before the crop is fully harvested.

Cane Sugar Production

The FY 2012 cane sugar forecast is 3.360 million STRV, the same as last month. This is 212,000 STRV more than last year and basically attributable to a return to a normal crop in Florida. NASS lowered its forecast of total sugarcane area harvested by 6,000 acres (8,000 fewer acres in Florida partially offset by 2,000 acres more in Texas), but increased its yield forecast from 32.3 tons last month to 32.4 tons per acre (an increase in Florida to 35.0 tons per acre, but a drop in Texas to 33.7 tons per acre).

Trade

On August 26, 2011, the USDA announced that sugar entering the United States under the FY 2011 raw sugar import tariff-rate quota (TRQ) will be permitted to enter U.S. Customs territory until October 31, 2011, a month later than the usual last entry date. The USDA previously announced on August 1, 2011 that sugar entering under the 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. These announcements do not change the level of any U.S. sugar import TRQs and apply only to raw cane sugar (not refined sugar).

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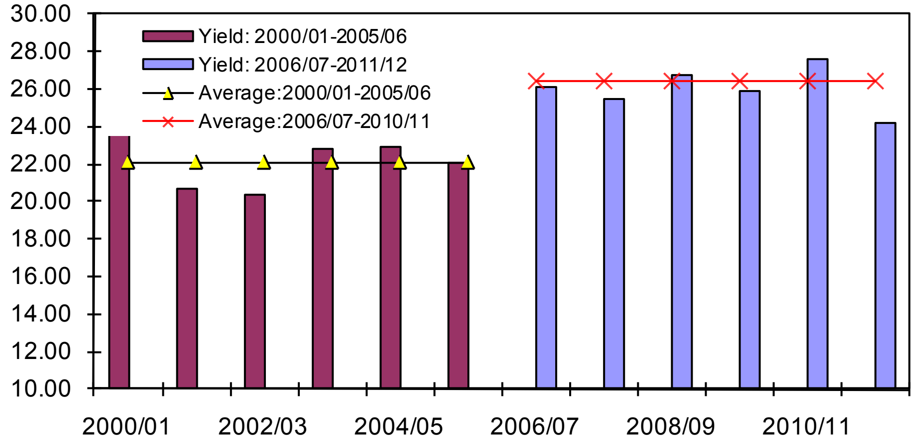
[1] The coefficient of variation (the standard deviation divided by the average) for the first 6-years is 0.0598 (1.32 divided by 22.1 tons) and 0.0307 (0.81 divided by 26.4 tons) for the next 5 years through 2010/11.

Figure 1

U.S. sugarbeet yields, 2001/01-2011/12, and period averages

Tons per acre

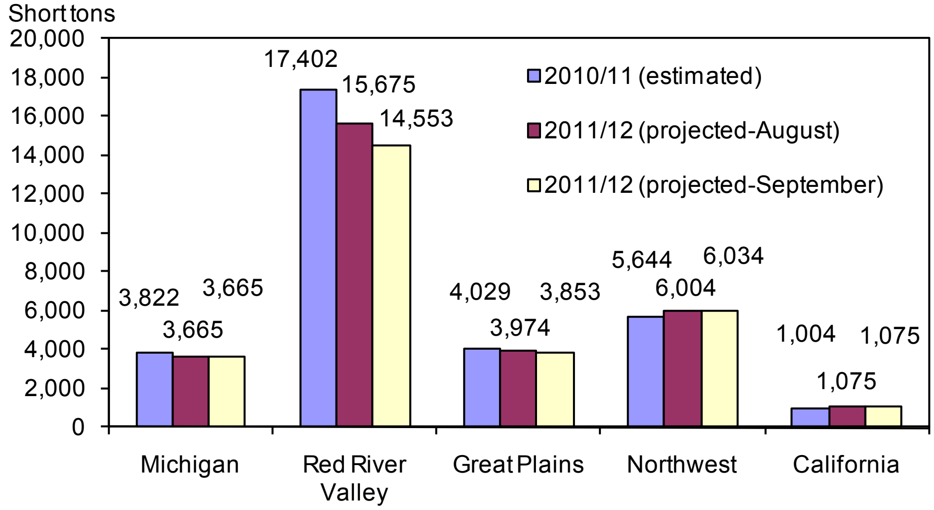


Source: USDA, NASS, *Crop Report*. (2011/12 projected as of Sept. 2011)

Figure 2

U.S. sugarbeet production, estimated 2010/11, projected 2011/12 by USDA, August and September 2011

Short tons



Source: USDA, NASS, *Crop report*.

Raw sugar TRQ imports for FY 2011 are estimated at 1.585 million STRV. Early imports from the FY 2012 raw sugar TRQ in the amount of 38,193 STRV are forecast to be offset by raw sugar imports from the FY 2011 raw sugar TRQ entering in October 2011. Also, the USDA revised its estimate of raw sugar TRQ shortfall from 65,000 STRV in August to 87,000 STRV in September.

Table 1 shows all the components of U.S. sugar imports for FY 2011. Total imports are estimated at 3.786 million STRV, including 1.624 million STRV from Mexico.

FY 2012 sugar TRQ imports are forecast at 1.384 million STRV. Table 2 shows the component details. The FY 2012 raw sugar TRQ was set at 1.231 million STRV, the minimum to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreement on Agriculture. The raw sugar TRQ shortfall is projected at 115,071 STRV. As explained earlier, imports from the FY 2011 raw sugar TRQ entering in October are projected to be offset by imports from the FY 2012 raw sugar TRQ entering in September 2011. The FY 2012 refined sugar TRQ was established at 124,251. This includes the WTO minimum access quantity of 24,251 STRV and an additional 100,000 STRV of organic sugar above the minimum.

Total imports for FY 2012 are projected at 2.962 million STRV, including 1.218 million STRV from Mexico.

Sugar Use and Stocks

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 current-year changes is to decrease FY 2011 ending year stocks by over 40,000 STRV to 1.745 million STRV, implying an ending year stocks-to-use ratio of 15.2 percent. Ending stocks projected for FY 2012 are decreased 215,000 STRV (lower beet sugar production combined with fewer beginning stocks) to 1.127 million STRV. The implied stocks-to-use ratio is 9.8 percent, a drop of 1.9 percentage points from last month.

Direct Consumption Imports

Figure 3 shows the growth in sugar deliveries for human consumption since FY 2003. While there has been some growth in deliveries from domestic beet sugar processors and cane sugar refiners, most growth has resulted from direct consumption sugar imports. In the early part of the period, these imports constituted a very small proportion of total deliveries. In FY 2006, increased direct consumption imports jumped to 6 percent of the total because domestic supply disturbances (lower than expected cane and beet sugar production) dictated greater imports. The sustained growth of direct consumption imports started in 2008 with the full implementation of the North American Free Trade Agreement (NAFTA) provisions covering sweetener trade between the United States and Mexico. Direct consumption imports constituted about 7.5 percent of total deliveries for FY 2009 and FY 2010 and are estimated above 8 percent (890,000 STRV) for FY 2011.

Prices

U.S. sugar prices have remained higher than historical levels. From January 2011 through the end of August, raw sugar prices (nearby Intercontinental Exchange (ICE) futures contract no. 16) averaged 38.11 cents per pound. The average for August, at 40.16 cents per pound, was more than 2 cents above the 7-month average. The margin between the U.S. raw sugar price and the world raw sugar price (ICE futures contract no. 11) averaged 11.29 cents in August, up from 8.46 cents in July. The average for September through the 12th is up to 12.35 cents.
The beet sugar price (low end of Midwest range from the Milling and Baking News) averaged 55.40 cents per pound the first 7 months of 2011 and averaged 57.00 cents per pound in August.

Table 1--USDA estimate of sugar imports in FY 2011

	Metric tons, raw value	Short tons, raw value
Raw sugar TRQ	1,520,892	1,676,497
Less shortfall attributable to Mexico 1/	0	0
Less other shortfall	-78,925	-87,000
Plus FY 2010 TRQ entries in October 2010	32,971	36,344
Less FY 2011 TRQ entries in September 2010	-37,007	-40,793
Less FY 2011 TRQ entries in October 2011	-34,648	-38,193
Plus FY 2012 TRQ entries in September 2011	34,648	38,193
Total raw sugar TRQ	**1,437,931**	**1,585,048**
Refined sugar TRQ		
Allocation to Canada	10,300	11,354
Allocation to Mexico	2,954	3,256
Less Mexican shortfall 1/	-2,954	-3,256
Global	7,090	7,815
Specialty		
Base	1,656	1,825
Additional	86,183	95,000
Total refined sugar TRQ	**105,229**	**115,995**
CAFTA/DR TRQ - calendar 2011	**125,700**	**138,561**
Other:		
Singapore, Bahrain, Jordan	20	22
Peru	2,000	2,205
Total estimate TRQ entries	**1,670,880**	**1,841,829**
Mexico	**1,473,283**	**1,624,000**
Re-export program imports	**272,155**	**300,000**
Sugar syrups, high-tier	**18,144**	**20,000**
Total projected imports	**3,434,462**	**3,785,829**

1/ Total entries from Mexico, quota and non-quota, reflected below.
Source: USDA, Foreign Agricultural Service.

Table 2--USDA estimate of sugar imports in FY 2012

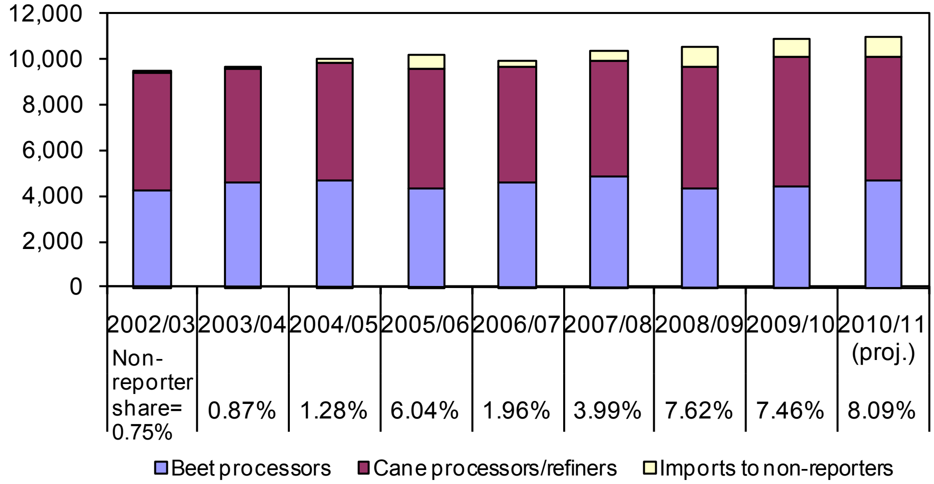
	Metric tons, raw value	Short tons, raw value
Raw sugar TRQ	1,117,195	1,231,497
Less shortfall attributable to Mexico 1/		
Less other shortfall	-104,391	-115,071
Plus FY 2011 TRQ entries in October 2011	34,648	38,193
Less FY 2012 TRQ entries in September 2011	-34,648	-38,193
Total raw sugar TRQ	**1,012,804**	**1,116,425**
Refined sugar TRQ		
Allocation to Canada	12,050	13,283
Allocation to Mexico		
Less Mexican shortfall 1/		
Global	8,294	9,143
Specialty		
Base	1,656	1,825
Additional	90,718	100,000
Total refined sugar TRQ	**112,718**	**124,251**
CAFTA/DR TRQ - calendar 2012	**128,020**	**141,118**
Other:		
Singapore, Bahrain, Jordan	21	23
Peru	2,000	2,205
Total estimate TRQ entries	**1,255,564**	**1,384,022**
Mexico	**1,104,962**	**1,218,000**
Re-export program imports	**317,518**	**350,000**
Sugar syrups, high-tier	**9,072**	**10,000**
Total projected imports	**2,687,116**	**2,962,022**

1/ Total entries from Mexico, quota and non-quota, reflected below.
Source: USDA, Foreign Agricultural Service.

Figure 3

U.S. sugar deliveries by source

1,000 short tons, raw value



Source: USDA, Foreign Agricultural Service, *Sweetener Market Data*.

Sugar in Imported Products

Table 3 shows an estimate of sugar contained in imported food and beverage products for the first 10 months of the fiscal year (October-July) since FY 2000. Year-over-year growth averaged 83,250 tons from FY 2001 through FY 2006 to reach 1.035 million tons of sugar in FY 2006 (first 10 months). Sugar in products fell in each of the subsequent 3 years and was estimated at 905,435 tons in FY 2009. Overall growth has resumed, and the FY 2011 estimate is 1.014 million tons, fairly close to the level in FY 2006. Nonetheless, the growth since FY 2006 has been uneven. Sugar in imported sugar confectionery is only 78 percent of its FY 2006 level, while sugar in cocoa and cocoa products is 22 percent higher and sugar in bread, pastries, and cakes is 25 percent higher than in FY 2006. Whereas sugar in sugar confectionery products constituted 40 percent of the total in FY 2006, the share has dropped to 32 percent in FY 2011. For the same period, sugar's share in cocoa and cocoa products has increased from 21 to 26 percent and from 11 to 15 percent for the bread, pastry, and cake category.

Sugar in Mexico

The USDA made no changes to the Mexico sugar supply and use for either 2010/11 or 2011/12. The 2010/11 export estimate is 1.482 million metric tons, raw value (MTRV) and is based on the pace of exports through August. Ending stocks for 2010/11 are estimated at 778,000 MTRV, implying an ending stocks-to-consumption ratio of 18.2 percent, less than the 22 percent often cited as the optimal ratio to meet consumption needs until the start of the next year's sugarcane harvest.

The 2011/12 export forecast is 1.113 million MTRV and is calculated residually by assuming 2011/12 sugar ending stocks will equal 22 percent of domestic sugar consumption. Although many commentators have been pessimistic about 2011/12 production prospects (most predict substantially less production than in 2010/11), the USDA did not change its production forecast of 5.650 million MTRV (5.330 million tonnes, tel quel). The USDA notes that rainfall from January 1 through early September in the primary growing area of Veracruz is recorded at 890 millimeters, or 14.3 percent higher than the 1983-2010 average for the corresponding time period. In the western areas of the Mexican corn belt, rainfall through early September is recorded at 407 millimeters, or 5.4 percent above the 1983-2010 average for the period. Reservoir levels in all regions except the northwest (where little sugarcane is grown)

Table 3--Sugar in imported products, first 10 months of fiscal year, October-July

Fiscal year (Oct-Sept)	Sugar confectionery	Cocoa and cocoa preparations	Cereal and bakers preparations	Bread, pastry, cakes, etc.	Misc. edible preparations	Carbonated soft drinks	Total
			--------- Short tons -----------				
2000	187,333	106,072	16,786	77,474	103,158	45,174	535,996
2001	208,242	117,066	15,583	88,122	101,707	51,181	581,900
2002	225,110	150,428	16,009	95,974	119,507	56,438	663,466
2003	275,736	168,027	18,500	105,568	123,009	66,581	757,422
2004	316,312	174,313	21,418	112,598	147,906	75,109	847,657
2005	339,570	183,197	21,380	115,393	158,387	84,745	902,673
2006	417,675	215,857	21,341	118,262	161,426	100,933	1,035,494
2007	364,247	232,486	21,122	128,105	158,193	104,884	1,009,037
2008	344,639	225,724	21,844	127,512	162,079	101,007	982,805
2009	308,620	217,117	13,791	124,866	144,143	96,898	905,435
2010	323,958	223,541	13,493	138,196	147,920	99,513	946,621
2011	326,701	262,876	14,584	147,588	155,570	106,896	1,014,215

Source: USDA, ERS, Sugar and Sweetener Team - calculations on U.S. Census import data.

are at levels close to those of a year earlier. The *Comite Nacional Para El Desarrollo Sustentable de la Cana de Azucar* (CNDSCA) has not announced its forecast yet.

Sugar prices have leveled off after having increased during the months of July and August. Refined sugar in Mexico City averaged 571 pesos per 50-kilgram bag during the first half of 2011 and increased to 603 pesos in July and 661 pesos in August. The price at the beginning of September is quoted at 658 pesos. For estandar sugar, the first-half average was 517 pesos per 50-kilogram bag. The average price increased to 560 pesos in July and 625 pesos in August. The price at the beginning of September is 614 pesos.

U.S. Sugar Exports in the WASDE

The Interagency Commodity Estimates Committee (ICEC) for sugar has been considering a change in the sourcing of U.S. sugar exports for the World Agricultural Supply and Demand Estimates (WASDE). The current series is based on exports reported by the Farm Service Agency (FSA) in its *Sweetener Market Data* (SMD) database. This series is based on survey data collected by FSA from U.S. sugarbeet processors, sugarcane processors, and cane sugar refiners. These entities are required by law to report to the FSA a range of supply and use data for administration of the U.S. sugar program. Most, if not all, of the reported exports take place as part of the Refined Sugar Re-Export Program. This program allows raw sugar to be imported at world price levels, with the requirement that a corresponding quantity later be re-exported as refined sugar within a set time frame. The SMD data have constituted the historical time series of exports reported in the WASDE, and also have been the basis for the current and 1-year-ahead WASDE forecasts for U.S. sugar exports.

The ICEC is considering whether to change reporting and forecasting from the SMD-base to a broader range of sugar exports reported by the U.S. Census Bureau in its Foreign Trade reporting system.[2] Sugar exports made by entities beyond those required to report to the FSA would be captured and be more representative of actual sugar supply and use. Another advantage would be the capability to report on destinations of sugar exports, not currently possible with the SMD-based system.

Within the sugar community, there is interest in tracking U.S. sugar exports to Mexico and perhaps other destinations that take place under the Refined Sugar Re-Export Program. Exporters licensed under that program are required to report export volumes and destinations to the Foreign Agricultural Service (FAS) for the issuance of export credits. The ICEC is considering publishing these data for total exports under the program, and for those program exports going specifically to Mexico.

Table 4 is a draft version of the WASDE-based U.S. sugar supply and use table that incorporates the changes in export data sourcing.[3] This table includes only historical data through FY 2010 – it excludes FY 2011 and FY 2012 because data for these fiscal years are still incomplete. Forecasting for the current and upcoming years may be considered once discrepancies in historic data are resolved. Exports are listed as the first set of items after "Total Supply." The first two lines with the headings "Total exports" and "Total exports to Mexico" list export data sourced from the U.S. Census Bureau. The next two lines "Reported credits to re-export program, Mexico" and "Reported credits to re-export program, total" list program data from FAS since FY 2006.

Figure 4 compares total U.S. exports reported by the U.S. Census Bureau with exports reported in *Sweetener Market Data*. There is a rough tracking between the two series. One might expect, at least theoretically, that Census exports would be equal to or greater than SMD exports because of the possibility of exports made by entities that do not report to the FSA. This would not seem to be the case for the fiscal years before FY 2006. Possible sources of discrepancies are differing months in which exports are recorded or the possibility that exports intended by processors were later diverted to other uses after leaving the processors.

The ICEC has not formally made the decision to change the sourcing of the export data. Table 5 shows a problem that has surfaced for FY 2011. The table shows the monthly FY 2011 data through May: U.S. sugar export data reported by the U.S. Census Bureau; Mexican imports of U.S. sugar reported by the *Economia* Secretariat, Government of Mexico; and U.S. sugar to Mexico reported for export credit reported by FAS. There is a close correspondence between data reported by *Economia* and FAS, but the Census-based monthly export data averages nearly twice as much as the other sourced data. The ICEC has decided against making the proposed export sourcing change until this discrepancy can be explained and then resolved.

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[2] The WASDE already bases its import reporting on data from either the U.S. Census Bureau or the U.S. Customs Service and not *Sweetener Market Data*.
[3] This tables closely resembles Table24a at www.ers.usda.gov/briefing/sugar/data.htm/.

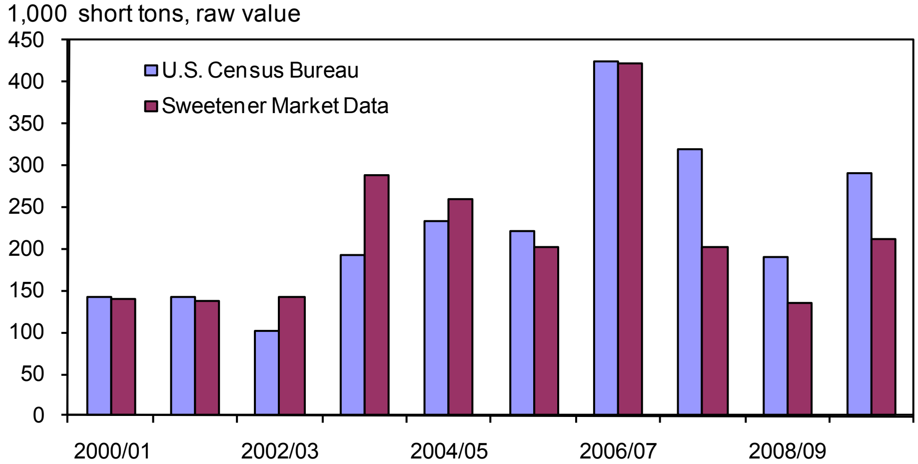
Table 4-- Proposed U.S. sugar supply and use, by fiscal year (October-September), sugar exports from the U.S. Census Bureau, 9/15/11

Items	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10
						1,000 short tons, raw value (STRV)				
	2,216	2,180	1,528	1,670	1,897	1,332	1,698	1,799	1,664	1,534
Beginning stocks 1/										
	8,769	7,900	8,426	8,649	7,876	7,399	8,445	8,152	7,531	7,963
Total production 2/	4,680	3,915	4,462	4,692	4,611	4,444	5,008	4,721	4,214	4,575
Beet sugar	4,089	3,985	3,964	3,957	3,265	2,955	3,438	3,431	3,317	3,387
Cane sugar	2,057	1,980	2,129	2,154	1,693	1,367	1,719	1,645	1,577	1,646
Florida	1,585	1,580	1,367	1,377	1,157	1,190	1,320	1,446	1,397	1,469
Louisiana	206	174	191	175	158	175	177	158	152	112
Texas	241	251	276	251	258	223	222	182	192	161
Hawaii	0	0	0	0	0	0	0	0	0	0
Puerto Rico										
	1,590	1,535	1,730	1,750	2,100	3,443	2,080	2,620	3,082	3,320
Total imports	1,277	1,158	1,210	1,226	1,408	2,588	1,624	1,354	1,370	1,854
Tariff-rate quota imports 3/	238	296	488	464	500	349	390	565	308	448
Other Program Imports	76	81	32	60	192	506	66	701	1,404	1,017
Non-program imports							60	694	1,402	807
Mexico 4/										
	12,575	11,615	11,684	12,070	11,873	12,174	12,223	12,571	12,277	12,817
Total Supply										
	142	143	102	192	234	221	424	320	189	292
Total exports 5/	35	43	58	139	170	148	340	244	152	249
Total exports to Mexico 5/						109	308	227	133	185
Reported credits to re-export program, Mexico 6/						154	347	269	152	207
Reported credits to re-export program, total 6/										
	123	-29	200	118	119	-85	-135	0	0	-126
Miscellaneous	10	0	0	0	0	0	0	0	0	0
CCC disposal, for domestic non-food use	0	0	0	0	0	0	0	0	0	0
Refining loss adjustment	113	-29	200	118	119	-85	-135	0	0	-126
Statistical adjustment 7/										
	10,132	9,974	9,711	9,862	10,188	10,340	10,135	10,587	10,554	11,152
Deliveries for domestic use										
Transfer to sugar-containing products	98	156	183	142	121	106	169	141	120	201
for exports under re-export program	33	33	24	41	48	51	53	61	46	35
Transfer to polyhydric alcohol, feed	10,000	9,785	9,504	9,678	10,019	10,184	9,913	10,385	10,387	10,917
Deliveries for domestic food and beverage use 8/										
	10,396	10,087	10,014	10,172	10,542	10,476	10,424	10,907	10,743	11,319
Total Use										
	2,180	1,528	1,670	1,897	1,332	1,698	1,799	1,664	1,534	1,498
Ending stocks /2	1,395	1,316								
Privately owned	784	212				*Percent*				
CCC										
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24

NOTE: Numbers may not add due to rounding.
1/ Stocks in hands of primary distributors and CCC. 2/ Historical data are from FSA , *Sweetener Market Data* (SMD).
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/ Starting in 2007/08, total includes imports under Mexico's WTO TRQ allocation for raw and refined sugar.
5/ Source: U.S. Census. 6/ Source: Foreign Agricultural Service. 7/ Calculated as a residual.
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.*

Figure 4

U.S. sugar exports, by reporting source: U.S. Census Bureau and USDA's Sweetener Market Data, 2000/01-2009/10



Source: USDA, FSA, *Sweetener Market Data* (SMD). U.S. Census Bureau;

Table 5--U.S. sugar exports to Mexico, reported by differing sources

	U.S. sugar exports to Mexico 1/	Mexico imports of U.S. sugar 2/	U.S. sugar to Mexico reported for export credit 3/
October	31,623	18,216	18,845
November	40,494	20,292	20,111
December	16,133	13,577	12,946
January	27,405	14,350	16,603
February	33,639	18,564	22,779
March	28,894	14,288	16,040
April	29,618	12,276	9,270
May	30,950	13,565	3,299
8-month total	238,757	125,127	119,893

1/ Source: U.S. Census Bureau.
2/ Source: Economia, Government of Mexico.
3/ Source: Foreign Agricultural Service.

Table 6--U.S. sugar: supply and use, by fiscal year 1/, 9/15/11

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
	1,000 short tons, raw value											
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	1,745
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	7,935
Beet sugar	4,680	3,915	4,462	4,692	4,611	4,444	5,008	4,721	4,214	4,575	4,800	4,575
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		
Total imports	1,590	1,535	1,730	1,750	2,100	3,443	2,080	2,620	3,082	3,319	3,786	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	1,842	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	13,230	12,642
Total exports 3/	141	137	142	288	259	203	422	203	136	211	250	200
Quota-exempt for re-export	141	137	142	288	259	203	422	203	136	211	250	200
Other exports	0	0	0	0	0	0						
CCC disposal, for export	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 re-export 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	1,745	1,127
Privately owned	1,395	1,316										
CCC	784	212										
	Percent											
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24	15.19	9.79

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.

6/ Starting in 2007/08, total includes imports under Mexico's WTO TRQ allocation for raw and refined sugar. 7/ Calfulated as a residual. Largely consists of invisible stocks change.

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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 7--U.S. sugar: supply and use (including Puerto Rico), fiscal years, metric tonnes, 9/15/11

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
						1,000 metric tons, raw value						
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	1,583
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	7,199
Beet sugar	4,245	3,552	4,048	4,257	4,183	4,032	4,543	4,283	3,822	4,151	4,354	4,150
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	3,434	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	1,671	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	12,002	11,469
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 re-export 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	1,583	1,022
Privately owned	1,266	1,194										
CCC	711	192										
						Percent						
Stocks-to-use ratio	20.97	15.15	16.68	18.65	12.63	16.21	17.25	15.26	14.28	13.24	15.19	9.79

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.

6/ Starting in 2007/08, total includes imports under Mexico's WTO (World Trade Organization) TRQ allocations 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 8--Mexico: sugar production and supply, and sugar and HFCS utilization (9/15/2011)

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 consumption	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, Foreign Agricultural Service, PSD database (historical data); USDA, *World Agricultural Supply and Demand Estimates* (forecast data).

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