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Sugar and Sweeteners Outlook

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Mexican Production Projections Decline, but U.S. Imports from Mexico Unchanged

U.S. total sugar supplies for 2014/15 are raised 50,000 STRV to 1.810 million in April. Beginning stocks for 2014/15 are increased based on revisions to 2013/14 data. Total imports are raised 37,000 STRV to 3.464 million, due to higher imports expected under quotas from Free Trade Agreements. Imports from Mexico remain unchanged at 1.526 million STRV. Total use remains unchanged at 12.219 million STRV, with domestic deliveries for food and beverage use remaining at 11.859 million STRV. Ending stocks are projected to increase 50,000 STRV to 1.700 million, resulting in the stocks-to-use ratio increasing from 13.5 percent to 13.9 percent.

U.S. sugar production in 2013/14 is raised 5,000 short tons, raw value (STRV) to 8.462 million; ending stocks increased 14,000 STRV to 1.810 million; and miscellaneous domestic deliveries are lowered to -3,000 based on revisions to Florida and Louisiana sugar processor data.

For 2014/15, Mexican total supplies are lowered 101,000 metric tons, actual value (MT). This is due to a 101,000 MT reduction in production due to severe weather in the key production region of Veracruz. Domestic consumption is raised 50,000 MT to 4.250 million MT based on strong pace-to-date data. Exports are reduced 125,000 MT to 1.506 million MT, but exports to the United States remain unchanged at 1.306 million MT. Ending stocks are reduced 26,000 MT, resulting in a stocks-to-domestic-consumption ratio of 22.9 percent, down from 23.8 percent in March.

U.S. honey production in 2014 reached its highest level since 2004, at 178 million pounds. Average prices in 2014 were $2.16 per pound, increasing for the ninth consecutive year. In 2014, U.S. honey imports reached 365 million pounds, an 8.2 percent increase from the previous year. Imports continue to account for more than two-thirds of total U.S. supplies.

United States Sugar Supply and Use

Revisions to data reported to the Farm Service Agency's (FSA) Sugar Market Data (SMD) in April resulted in several small revisions to the 2013/14 balance table. Higher cane sugar production was reported in Florida and Louisiana. Florida cane sugar production is increased by slightly more than 4,000 short tons, raw value (STRV), to 3.667 million. Louisiana production is increased by less than 1,000 STRV to 1.591 STRV. As a result, total domestic sugar production for the year was increased by nearly 5,000 STRV to 8.462 million. Total supply was increased by the same amount to 14.362 million STRV. Revisions were also made to inventories, with ending stocks revised upward by 14,000 STRV to 1.810 million. As a result, miscellaneous deliveries were reduced from 6,000 STRV to -3,000 to balance supply and use and food and beverage use was lowered by 9,000 STRV to 11.819 million. The revised 2013/14 stocks-to-use ratio is 14.4 percent, up slightly from the previously estimated 14.3 percent.

Table 1 -- U.S. sugar: supply and use, by fiscal year (Oct./Sept.), April 2015.

Items	2012/13	2013/14 (estimate)	2014/15 (forecast)	2012/13	2013/14 (estimate)	2014/15 (forecast)
	1,000 Short tons, raw value			1,000 Metric tons, raw value		
Beginning stocks	1,979	2,158	1,810	1,796	1,958	1,642
Total production	8,981	8,462	8,645	8,148	7,676	7,843
Beet sugar	5,076	4,794	4,870	4,605	4,349	4,418
Cane sugar	3,905	3,667	3,775	3,543	3,327	3,425
Florida	1,867	1,763	1,950	1,694	1,599	1,769
Louisiana	1,686	1,591	1,520	1,530	1,444	1,379
Texas	173	145	125	157	132	113
Hawaii	179	168	180	163	153	163
Total imports	3,224	3,742	3,464	2,925	3,394	3,143
Tariff-rate quota imports	957	1,302	1,528	868	1,181	1,386
Other program imports	136	305	400	124	277	363
Non-program imports	2,131	2,135	1,536	1,933	1,937	1,393
Mexico	2,124	2,130	1,526	1,927	1,932	1,384
Total supply	14,185	14,362	13,919	12,868	13,029	12,627
Total exports	274	306	225	249	278	204
Miscellaneous	-24	0	0	-22	0	0
Deliveries for domestic use	11,776	12,246	11,994	10,683	11,109	10,881
Transfer to sugar-containing products for exports under reexport program	80	82	100	73	74	91
Transfer to polyhydric alcohol, feed, other alcohol	32	29	35	29	27	32
Commodity Credit Corporation (CCC) sale for ethanol, other	153	316	0	139	287	0
Deliveries for domestic food and beverage use	11,511	11,819	11,859	10,442	10,722	10,758
Total Use	12,025	12,552	12,219	10,909	11,387	11,085
Ending stocks	2,160	1,810	1,700	1,959	1,642	1,542
Private	1,844	1,796	1,700	1,672	1,629	1,542
Commodity Credit Corporation (CCC)	316	0	0	287	0	0
Stocks-to-use ratio	17.96	14.42	13.91	17.96	14.42	13.91

Source: U.S. Dept. of Agriculture, Economic Research Service, Sugar and Sweetener Outlook.

U.S. sugar beginning stocks for 2014/15 are increased 14,000 STRV from March to April to 1.810 million due to the revisions in 2013/14 SMD data. Projected production in 2014/15 remains unchanged from March at 8.645 million STRV. Beet sugar production for the year is still expected to total 4.870 million STRV, as processor reports through February were in line with previous expectations and no new information was presented from the National Agricultural Statistics Service (NASS). Cane sugar production also remains unchanged at 3.775 million STRV. Processor reports show that cane processing in Louisiana for the 2014/15 crop was completed in January, totaling

1.492 million STRV. Louisiana producers typically start processing new crop in September, which is accounted for in the current fiscal year. The expected early production from the 2015/16 crop rounds out the current Louisiana production forecast for FY2015 at 1.520 STRV. Cane sugar production from Florida, Hawaii, and Texas remains unchanged from March at 1.950 million, 180,000, and 125,000 STRV, respectively.

Total imports for 2014/15 were increased 37,000 STRV to 3.464 million. The increase was entirely attributed to changes to the expected sugar imports entered under terms of Free Trade Agreements with Colombia, Peru, and Panama. These agreements provide quotas on a calendar year basis for each country. Some shipments from Colombia and Panama that were expected to enter later in calendar year 2015 are now expected to enter during the FY2015 period. This change is offset partially by a reduction in sugar entering from Peru, which is not expected to enter in FY2015. U.S. imports under other programs, including the TRQ program, remain unchanged from the previous month. Imports from Mexico remain at 1.526 STRV for 2014/15, based on the calculation of U.S. Needs using March *WASDE* projections, as defined by the Agreement Suspending the Countervailing Duty Investigations on Sugar from Mexico. Further discussion on Mexican shipments to the United States is available in the subsequent section of this report.

Projected domestic sugar deliveries for 2014/15 remain at 11.994 million STRV, unchanged from the previous month. Deliveries for food and beverage projections are also unchanged at 11.859 STRV. Domestic deliveries from reporters to the sugar program remain 3.0 percent above last year through February. Imports from non-reporters of sugar used for direct consumption still lag significantly through February compared with last year due to uncertainties surrounding the U.S. International Trade Commissions (USITC) and U.S. Department of Commerce (USDOC) anti-dumping (AD) and countervailing duty (CVD) investigations against sugar from Mexico. There are indications that Mexican shipments to the United States have increased in recent months as the agreements to suspend the investigations progress (see below for a summary of the recent USITC decision regarding the suspension agreements). There still should be enough time and logistical capacity for Mexico to meet its allotment for 2014/15, although monitoring of shipments from Mexico will continue to be important through the remainder of 2014/15 in determining domestic food and beverage use delivery projections.

Other sugar deliveries remain unchanged at 135,000 STRV for 2014/15. Sugar exports also remain unchanged at 225,000 STRV.

The increase in total U.S. supplies and no change in use result in ending stocks increasing 50,000 STRV to 1.700 million for 2014/15. This increases the stock-to-use ratio for the year to 13.9 percent, up from the previous month's projection of 13.5 percent.

Mexico Sugar Supply and Use

Mexican sugar supplies in 2014/15 are projected at 7.055 million metric tons, actual weight (MT), a 101,000 MT decline from March's projection. Beginning stocks remain unchanged from the previous month, at 831,000 MT. Likewise, total imports for 2014/15 are unchanged at 174,000 MT—with 164,000 MT expected from the IMMEX program and 10,000 MT imported for consumption. A lower projection of domestic production for 2014/15—6.050 million MT—accounts for the entirety of the lower projection of Mexican supplies.

Table 2 -- Mexico sugar supply and use, 2012/13 - 2013/14 and projected 2014/15, April 2015

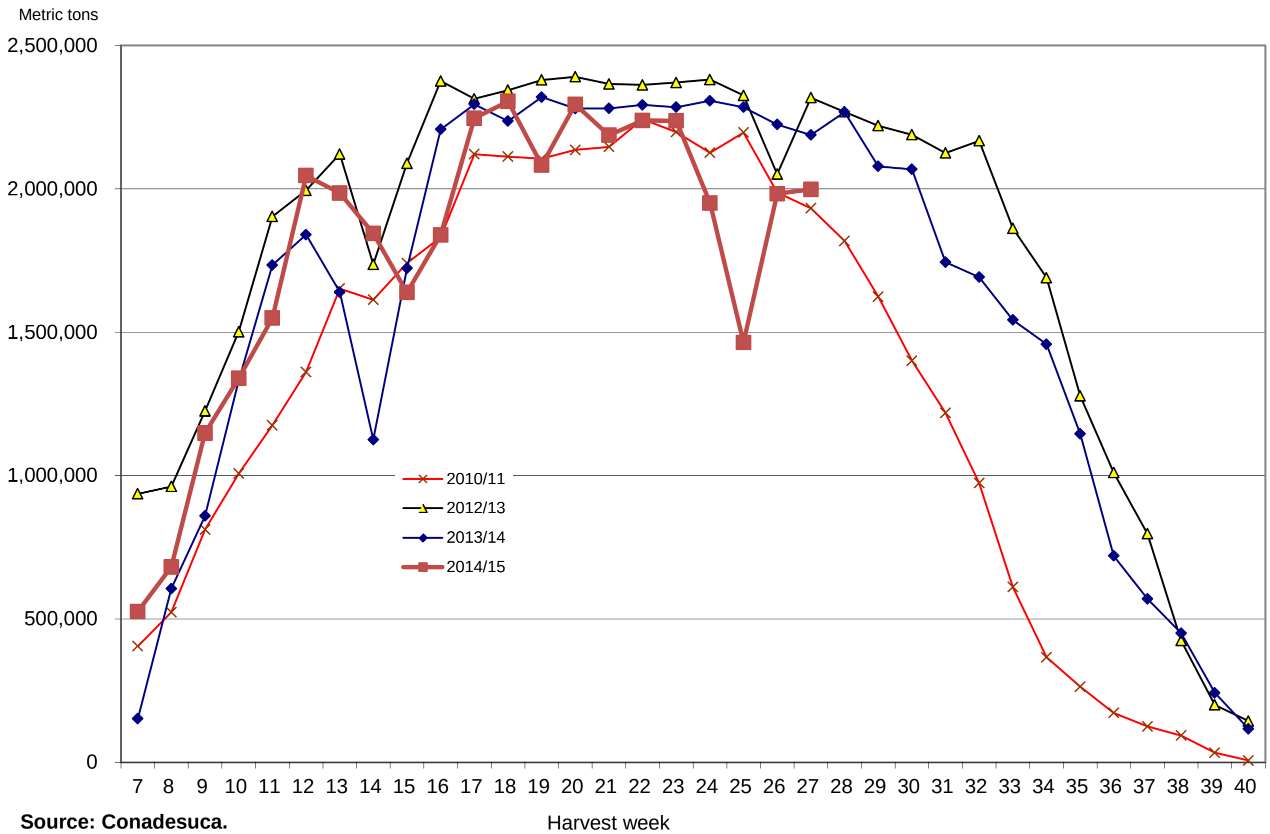
Items	2012/13	2013/14 (estimate)	2014/15 (forecast)
	1,000 metric tons, actual weight		
Beginning stocks	966	1,460	831
Production	6,975	6,021	6,050
Imports	217	131	174
Imports for consumption	9	9	10
Imports for sugar-containing product exports (IMMEX) 1/	207	123	164
Total supply	8,157	7,613	7,055
Disappearance			
Human consumption	4,287	4,098	4,250
For sugar-containing product exports (IMMEX)	384	324	324
Statistical adjustment	53	-151	0
Total	4,724	4,271	4,574
Exports	1,973	2,511	1,506
Exports to the United States & Puerto Rico	1,818	1,823	1,306
Exports to other countries	155	689	200
Total use	6,697	6,782	6,080
Ending stocks	1,460	831	975
	1,000 metric tons, raw value		
Beginning stocks	1,024	1,548	881
Production	7,393	6,383	6,413
Imports	230	139	184
Imports for consumption	10	9	11
Imports for sugar-containing product exports (IMMEX)	220	130	173
Total supply	8,646	8,069	7,478
Disappearance			
Human consumption	4,544	4,344	4,505
For sugar-containing product exports (IMMEX)	407	343	343
Statistical adjustment	56	-160	0
Total	5,007	4,527	4,848
Exports	2,091	2,662	1,596
Exports to the United States & Puerto Rico	1,927	1,932	1,384
Exports to other countries	164	730	212
Total use	7,099	7,189	6,445
Ending stocks	1,548	881	1,034
Stocks-to-human consumption (percent)	34.1	20.3	22.9
Stocks-to-use (percent)	21.8	12.3	16.0
High fructose corn syrup (HFCS) consumption (dry weight)	1,567	1,372	1,420

1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

Source: USDA, WASDE and ERS, Sugar and Sweeteners Outlook; Conadesuca.

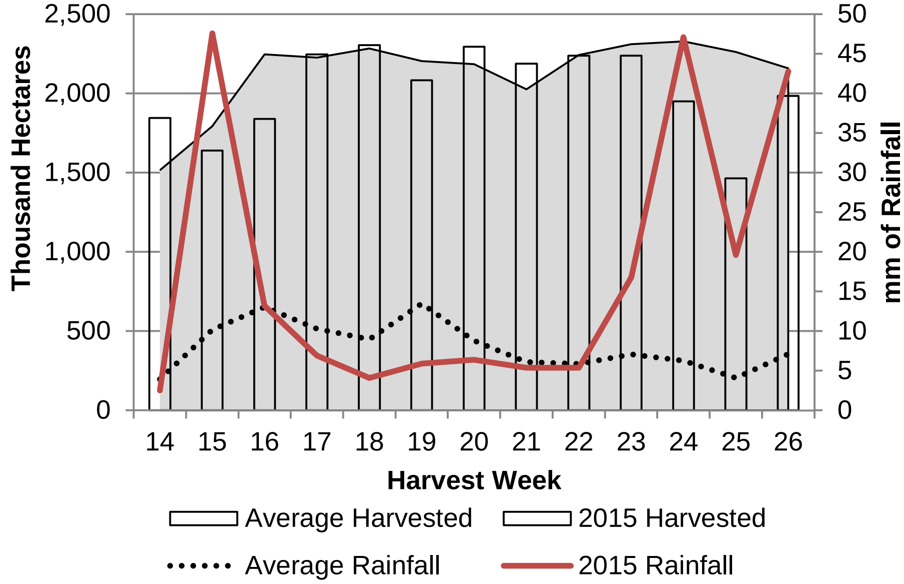
The reduction in projected Mexican sugar production in 2014/15 is due to severe rain and hail in Veracruz, the largest sugarcane producing State in Mexico, during the month of March. Weekly production data reported by Mexico's *Comité Nacional Para Desarrollo de la Caña de Azúcar* (Conadesuca) indicate that harvest progress and cane production from mid-March through the first week in April fell substantially. While the full impact of the weather conditions are still being evaluated, this sets back the pace of harvest relative to the agency's initial production estimate in November 2014. Prior to the recent weather events in the first week of March, producers were already 60,000 hectares behind the expected pace of Conadesuca's initial production estimates. By the first week of April, the harvest had fallen 86,000 hectares behind the pace expected—corresponding to about14.3 percent of total expected harvest area. Reports indicate that weekly harvest rates have not returned to pre-March levels and still lag behind, with only several weeks remaining before the harvest traditionally begins to conclude for the year. Additionally, the delays in harvesting and conditions of the fields could impact the cane yields and recovery rates for the crop. The current forecast reflects the increasing likelihood that final harvest area will be lower than Conadesuca's fall estimate and that sugar yields per acre will likely be lower than previously anticipated. Information will continue to be monitored, however, and projections adjusted as the effects of the detrimental weather conditions on the sugarcane crop are realized.

Figure 1
Sugarcane production, by week of harvest, 2010/11-2014/15



Source: Conadesuca.

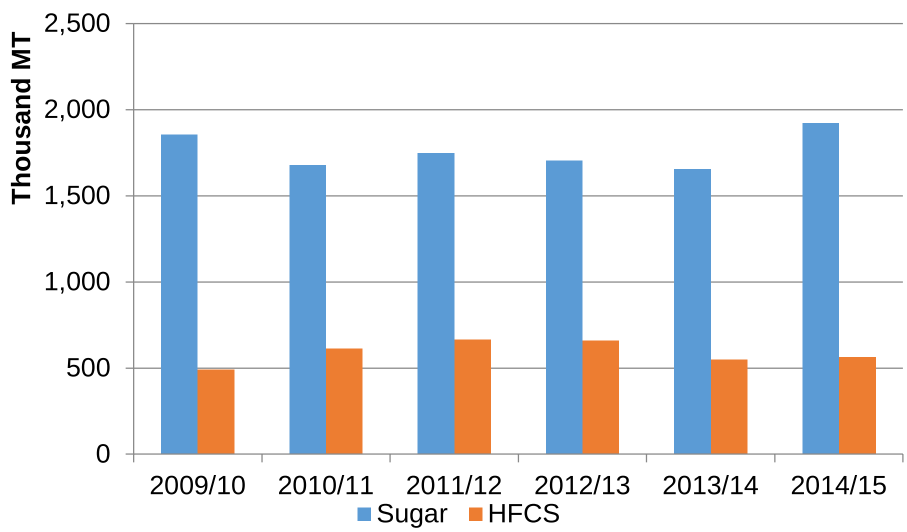
Figure 2
Weekly Veracruz rainfall and Mexico sugarcane harvested area



Source: Conadesuca; Office of the Chief Economist, USDA.

Mexican domestic deliveries for 2014/15 are projected to be 4.574 million MT, up 50,000 MT from the March projection. This increase is due to a 50,000 MT increase in the projection for domestic consumption. The April domestic consumption projection is 4.250 million MT—up 50,000 MT from March projections and representing a 3.7 percent increase from the previous year. Through February, Conadesuca reports that sugar consumption in 2014/15 is 16.2 percent above the previous year and that HFCS consumption is 2.7 percent higher. It is unclear what factors are driving such a strong rate of growth for sweeteners or if the pace will be sustained for the remainder of the year. The increased consumption projection reflects the fact that demand has been stronger than initially anticipated thus far in the year.

Figure 3
Mexican sweetener consumption October to February, fiscal year



Source: Conadesuca.

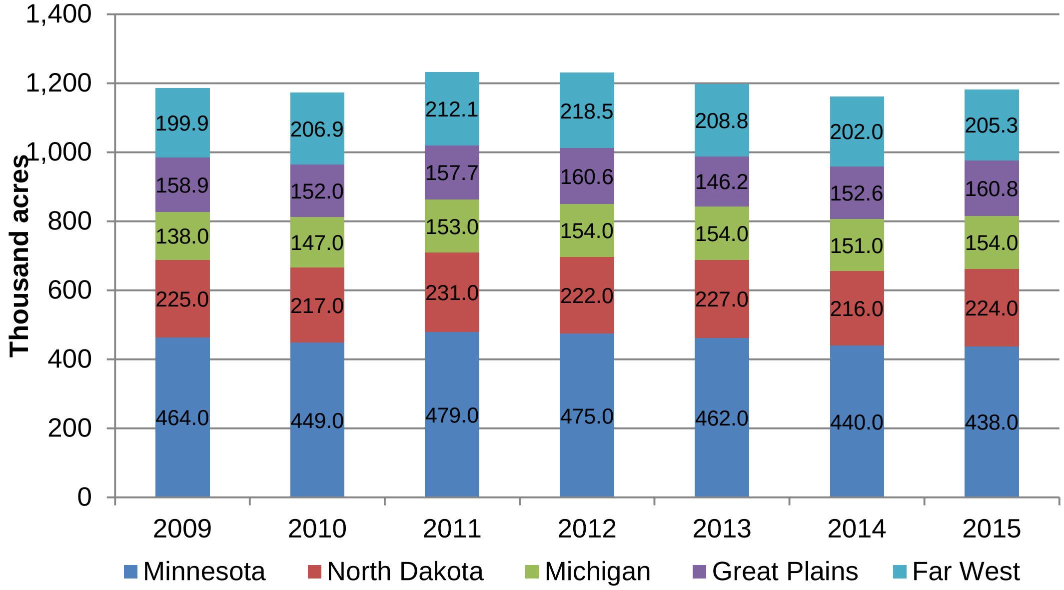
Projected Mexican sugar exports for 2014/15 are lowered 125,000 MT to 1.506 million MT. Projected exports to the United States remain at 1.306 million MT, representing the full allotment granted by the suspension agreement, and remain unchanged from the previous month's projection. Exports to countries other than the United States are projected to total 200,000 MT, which is a 125,000 MT decrease from March. Relatively lower world raw sugar prices over the past few months have dimmed the prospects of Mexican sugar being shipped overseas and increases the likelihood of earlier contracts being amended or renegotiated. Given that prices in the United States are relatively higher than the world market, it is believed that shipments to the United States will continue and that producers will fully utilize the allotment volumes provided by the suspension agreement.

Ending stocks in 2014/15 are projected to decline by 26,000 MT to 975,000 MT, as the net decline in total use will be less than the reduction in total supplies. The stocks-to-domestic-consumption ratio is projected to be 22.9 percent, down slightly from the previous month's rate of 23.8 percent. This rate is in line with the historical target of 22 percent, which also supports the view that there are ample supplies for Mexican producers to fulfill their allotment into the U.S. market despite expectations of lower production.

Planting Intentions Indicate an Increase of Sugarbeets in 2015

Farmers intend to plant 1.182 million acres of sugarbeets in 2015 according to the NASS March 31, 2015 *Prospective Plantings Report*. This acreage would constitute a 1.8-percent increase from 2014 planted area. Minnesota is expected to remain the largest sugarbeet producer, with prospective plantings of 438,000 acres, followed by North Dakota with prospective plantings of 224,000 acres. As a group, the Red River Valley States represent 56 percent of total plantings. Compared with the previous year, Minnesota plantings would decrease slightly (down 0.5 percent), while North Dakota plantings would increase by 3.7 percent. The next largest State is Michigan, which is estimating 154,000 planted acres in 2015, a 2.0 percent increase from 2014. The largest increases are expected in the Great Plains, which will increase to 161,000 acres, a 5.4 percent increase led by larger expected plantings in Nebraska (14.6 percent), Colorado (7.8 percent), and Wyoming (4.3 percent) that will outweigh the expected decline in Montana (down 5.3 percent). In the Far West, acreage is expected to increase 1.6 percent to 205,000 acres, despite a slight 0.6 percent decline from Idaho, which is the largest producing State in the region. Increased acreage in California (up 2.9 percent) and Oregon (up 53.7 percent) will result in a net increase in the region.

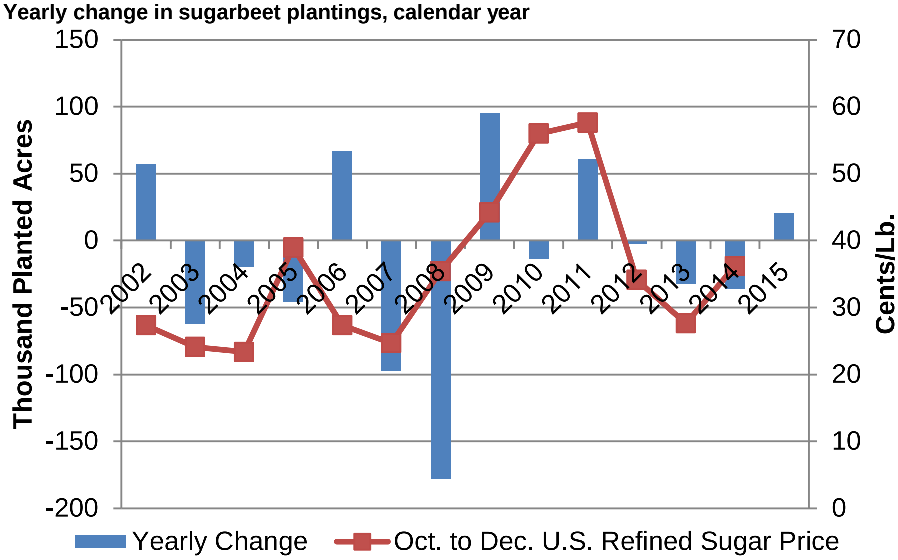
Figure 4
U.S. sugarbeet planted acres



Note: Prospective plantings for 2015. Actual plantings for historical data.
Source: National Agricultural Statistics Service, USDA.

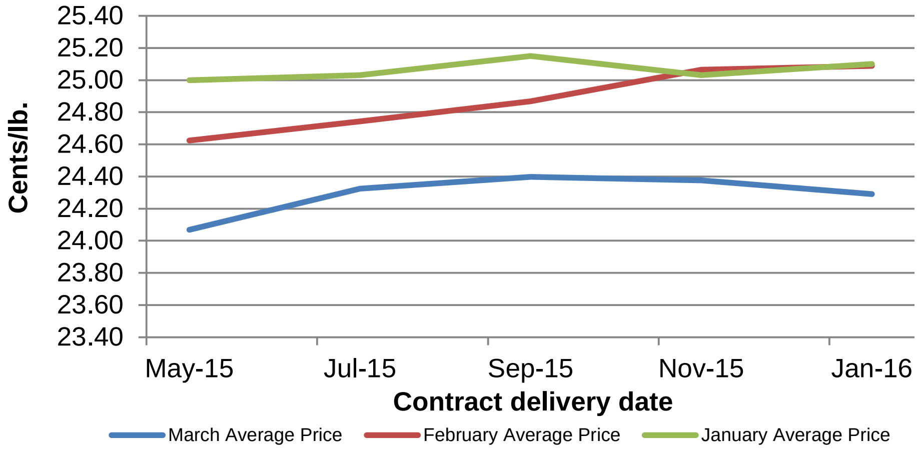
The net increase of acreage expected in 2015 would be the first since 2011. Refined sugar prices in the October to December quarter of FY2015 improved compared with the declines in 2012 and 2013. Additionally, while raw U.S. sugar futures contract prices have fallen since January, prices for FY2015 remain above May 2015 futures prices.

Figure 5
Yearly change in sugarbeet plantings, calendar year



Source: National Agricultural Statistics Service, USDA; Economic Research Service, USDA.

Figure 6
U.S. raw sugar futures contract average price



Source: Intercontinental Exchange.

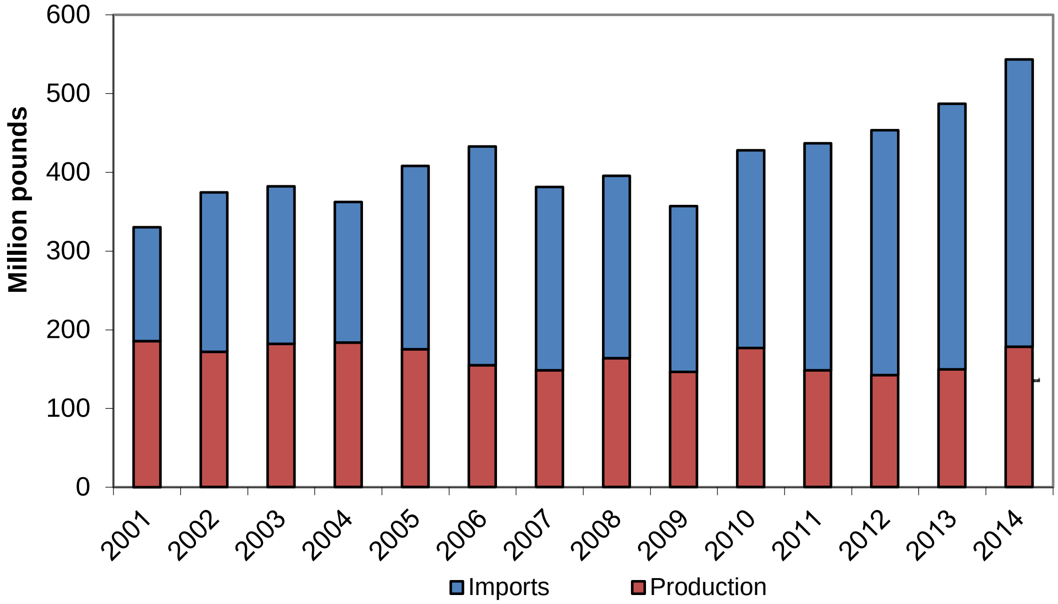
U.S. International Trade Commission Upholds Agreements To Suspend Mexican Sugar Investigations

On March 19, 2015, the Commissioners of the USITC voted unanimously to uphold the suspension agreements that were signed between the USDOC and the Government of Mexico. On April 10, 2015, the USTIC published its full explanation for the determination. The USITC's decision removes some uncertainty regarding the fate of the terms agreed upon in the agreements, although there is the potential that the USITC's decision could be appealed. Additionally, there is still a challenge with the USDOC's International Trade Administration requesting that the agency continue its AD/CVD investigations, although the agency has not yet determined if the parties filing the motion have standing to do so. The terms of the suspension agreement remain in place as these proceedings continue.

U.S. Honey Production at Highest Level in 10 Years

U.S. honey production reached 178 million pounds in 2014. Although the international honey market has a shortage of honey and honey prices were up sharply in 2014, the U.S. honey market has recovered to the highest production level since 2004 and prices received by honey producers increased 1 percent. The domestic honey harvest jumped 19 percent in 2014 as yield per bee colony increased by an average 15 percent and as 3.8 percent more commercial colonies were in production. The additional 100 honey-producing bee colonies and the extra 8.5 pounds harvested on average from each colony in 2014 marked the second consecutive year of increased crop output from 2012's record-low production.

Figure 7
U.S. Honey production and imports



Sources: USDA, NASS, Honey; U.S. Census Bureau.

The average price of $2.16 per pound received in 2014 marked the ninth time in a row that honey prices have gone up since 2005, when the price was 92 cents per pound. It was also in 2005 that the import share of U.S. honey supply first hit 50 percent before continuing its trend up to 65 percent in 2013 and 63 percent in 2014. The growth in imports is directly related to greater demand, reflected in part in the continuous rise in prices.

The value of U.S. honey production reached a record $385.2 million in 2014, 16 percent more than in 2013. This amount is more than twice as much as the value in 2007, when the price per pound of honey was half as much as last year's $2.16. This indicates that the average farm value per bee colony exceeded $140 for the first time. Honeybee keepers in South Dakota and Montana received $182 and $180 per colony on average in 2014. Keepers in Texas and in North Dakota, the largest honey producer, made at least $170 per bee colony last year.

The average growth in honey prices received by producers from 2004 to 2014 was 7.1 percent per year. The corresponding growth of U.S. honey production was negative 0.3 percent on average over the past decade. That is, prices more than doubled as production returned only to its level of 10 years ago. Honey production in the United States has essentially not grown over the past decade, even as the number of bee colonies has increased 0.7 percent per year since 2004, because honey yield per colony has declined 1 percent annually. While the value of honey production rose on average 7 percent per year during the same period, the value of U.S. honey imports has risen by 15 percent annually. The growth in import volume by 7.4 percent per year since 2004 is matched by the average 7-percent rise in import prices.

As imports increased an average of 12 percent over the past 5 years, more than twice the growth in production, U.S. per capita use of honey inched up from 1.2 pounds in 2009 to 1.7 pounds in 2014. Last year's per capita use level is the highest in at least the past five decades as more honey is used as an ingredient in processed food products. While some imported honey is mixed in with domestic honey for food manufacturing or for direct sale to consumers, a larger proportion is used by food manufacturers, and a bigger share of domestically produced honey is sold to consumers for table use.

At the producer price level, U.S. use of honey in 2014 amounted to a record $2.89 per capita. This value has gone up starting from 2005 when per capita use was valued at $1. Per capita use of honey in both quantity or value terms would be smaller without the sharp rise in imported honey. While the U.S. wholesale price of honey has climbed 7.3 percent on average in the past decade, the import unit value for honey has grown 6.9 percent annually. As a share of the total volume of U.S. use, imported honey reached 78 percent in 2014, up from 72 percent in 2013.

The United States is the second largest market for honey after the European Union, which also has the highest per capita honey consumption. The world's largest honey producer is China, which exports around 30 percent of its production, followed by the European Union. U.S. honey imports from China, which was the largest foreign supplier until 2006, were reduced to zero last year and to negligible amounts in recent years because of an anti-dumping duty order on honey from Chinese exporters. U.S. honey imports in 2014 amounted to $560.5 million, close to twice as much as the value of U.S. domestic production. About half of these imports were from Argentina and Vietnam. While Argentina has been the top source of imported honey in volume terms since import tariffs were imposed on Chinese honey in 2007, Vietnam surpassed Argentina in import volume starting in 2008.

In 2014, the United States imported 365 million pounds of honey, up 8.2 percent from 2013. U.S. honey imports from Vietnam made up two-thirds of the 44 million-ton decline from Argentina, India, Canada, and Uruguay. The average import unit value of honey in 2014 was $1.54 per pound, which is 62 cents lower than the average price received by U.S. honey producers. The price competitiveness of imported honey over domestically produced honey means that food products containing honey derive some of their price competitiveness from lower import prices, since most imported honey is used as an ingredient by U.S. food manufacturers. For table use, however, honey produced domestically is preferred by American consumers because of its superior grade.

Illegal Chinese Honey Importation

The USDOC first issued CVD and AD orders on imports of honey from Argentina and an anti-dumping duty order on imports from China in 2001. Argentinian honey was found to be subsidized by the Government of Argentina (the net countervailing subsidy is 5.85 percent), and Chinese honey was sold in the United States at less than fair market value. In effect, these duties increased the import cost of honey from these two suppliers and reduced demand from U.S. importers. Although imports from Argentina have recovered and increased through 2014, imports from China have diminished to insignificant volumes since 2009. The duty rate on Chinese honey is 1.9 cents per kilogram and a 5.1-percent ad valorem tax is imposed on sugar or sugar syrup mixed with honey. Nevertheless, the domestic honey industry continues to claim that the quantity of Chinese shipments is underestimated due to circumvention and transshipment through other supplier countries by Chinese honey exporters.

The most recent news about illegal importation, or smuggling, of Chinese honey into the United States was in October 2014 when special agents with the U.S. Immigration and Customs Enforcement and officers with U.S. Customs and Border Protection announced the seizure of 448,000 pounds of illegally imported Chinese honey valued at $2.45 million, in Houston, Texas. The shipment documents for the barrels indicated that the bulk of the honey originated in Latvia. This incident is only the most recent of many seizures of Chinese honey disguised as originating from a third country since December 2001.

In March 2013, one of the largest honey packers in the country, Groeb Farms of Onsted, Michigan, admitted buying millions of dollars' worth of honey that was falsely labeled. The mislabeling was to disguise cheap honey from China, which was first shipped to middlemen in third countries such as Indonesia, Vietnam, India, or Turkey where the bulk honey in drums are relabeled as a local product and then exported to the United States. In another instance, Chinese exporters labeled containers as rice syrup. These cases are documented by True Source Honey, an industry consortium formed in 2010 that has set up an auditing and testing system to guarantee the true source of honey sold in the United States. In past examples of fraud, raw honey was traced to its source by analysis of the pollen it contained. If the pollen is from flowers that grow in China and not in the reported import country, scientists can show that the honey came from China. True Source-certified honey accounts for at least a quarter of U.S. honey consumption.

Various evasion schemes were used to import virtually all of the 310 million pounds of Chinese honey between 2001 and 2008, an average of 44 million pounds per year. The most common evasion schemes were “false country-of-origin” and “honey/rice syrup”. Dishonest U.S. importers fraudulently reported to U.S. Customs that the shipment of pure honey was either produced in a foreign country other than China or was a blend of honey and rice syrup from China. The latter scheme was to evade or reduce import duties because of undervaluation or exclusion due to the higher proportion of rice syrup than honey in the blend.

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