United States Department of Agriculture

Economic Research Service | Situation and Outlook Report

SSS-M-453 | May 18, 2026

Next release is June 17, 2026

Sugar and Sweeteners Outlook: May 2026

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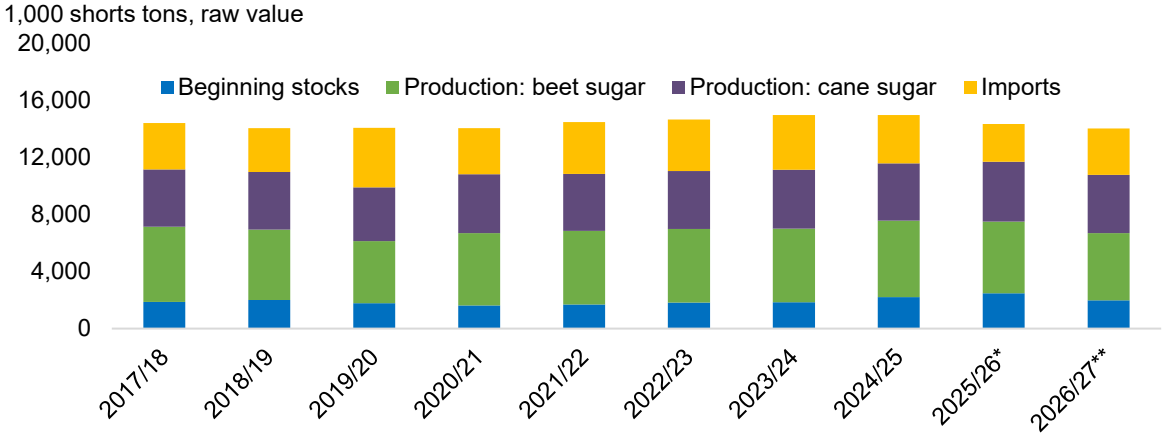
In this report:

U.S. 2026/27 Sugar Supply Is Forecast Lower; Mexico's 2026/27 Sugar Output Is Mostly Flat

The U.S. fiscal year 2026/27 sugar supply is forecast at 14.062 million short tons, raw value (STRV), down about 300,000 STRV from 2025/26 on lower beginning stocks and domestic sugar production more than offsetting larger imports. Imports include projections for organic sugar (269,000 STRV) and refined sugar (197,000 STRV) paying the high-tier duty, which are about the same as the 2025/26 levels. Imports from Mexico are calculated at 1.046 million STRV based on the U.S. Needs formula from the sugar suspension agreements to achieve a 13.5 percent stocks-to-use ratio. Sugar use is unchanged from 2025/26 at 12.389 million STRV. The resulting ending stocks are 1.673 million STRV, down about 300,000 STRV.

Mexico's 2026/27 sugar production is forecast at 5.142 million metric tons (MT), slightly below 2025/26, based on USDA, Foreign Agricultural Service's Mexico City Post.

Figure 1
U.S. total sugar supply by category, fiscal years 2017/18–2026/27



Note: (*) denotes estimate, (**) denotes forecast.
Source: USDA, Economic Research Service calculations using data from USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*).

U.S. Sugar Outlook

U.S. 2026/27 Sugar Production Is Expected To Be the Lowest Since 2019/20; 2025/26 Sugar Output Is Also Reduced

Domestic sugar production in fiscal year 2026/27 is forecast at 8.810 million short tons, raw value (STRV), the lowest since 2019/20, as both beet and cane sugar production are reduced (table 1). Beet sugar output is projected at 4.722 million STRV, down about 300,000 STRV from last year and the lowest since the freeze-reduced output in 2019/20. Cane sugar production is expected at 4.088 million STRV, down 130,000 STRV from 2025/26 and the lowest since 2022/23. Beet and cane processors will submit their first 2026/27 forecast next month, which will be published in the June USDA, Farm Service Agency, *Sweetener Market Data* (SMD) report.

For 2025/26, U.S. sugar production is decreased 29,000 STRV from last month to 9.239 million STRV. Beet sugar production is reduced 40,000 STRV to 5.021 million STRV on estimated adjustments to sugarbeet shrink and sugar recovery in the final periods of the beet slicing campaign (table 2). This reduction is slightly offset by an increase in Florida cane sugar production following cane processors' *SMD* reporting, which indicated a gain of 11,000 STRV to 1.987 million as the harvest campaign is nearing the end.

The reduced outlook for 2026/27 beet sugar production is partly driven by a relatively low national planted area of 1.063 million acres from the USDA, National Agricultural Statistics Service (NASS), March *Prospective Plantings*. Applying the 10-year average (2016/17–2025/26) for harvested-planted ratio results in a harvested area of 1.039 million acres, the lowest level since 2019/20. Since NASS' initial sugarbeet yield forecast will not be released until the August 12 *Crop Production* report, sugarbeet yield is forecast at 30.21 tons per acre, the lowest since 2022/23 given weather-delayed planting progress across sugarbeet-producing States that is expected to negatively impact yields. As of May 10 (week 19), 79 percent of the sugar beet crop in the top four reporting States (Idaho, Michigan, Minnesota, and North Dakota) was planted, up 24 percentage points from a week earlier but still behind last year's pace of 90 percent. A 10-year average is also applied for projections of beet pile shrink (7.063 percent) and sucrose recovery from slice (14.79 percent).

Table 1: U.S. sugar supply and use by fiscal year (October–September), 1,000 short tons raw value

	2024/25	2025/26			2026/27	
	Final	April	May	Monthly change	May	Annual change
Beginning stocks	2,220	2,490	2,490	0	1,992	-497
Total production	9,397	9,268	9,239	-29	8,810	-429
Beet sugar	5,370	5,060	5,021	-40	4,722	-299
Cane sugar	4,027	4,207	4,218	11	4,088	-130
Florida	1,932	1,976	1,987	11	1,942	-44
Louisiana	2,095	2,232	2,232	0	2,146	-86
Texas 1/	0	0	0	0	0	0
Total imports	3,393	2,512	2,653	141	3,260	607
Tariff-rate quota imports	1,534	1,316	1,316	0	1,422	107
Other program imports	373	300	300	0	300	0
Non-program imports	1,485	896	1,037	141	1,538	501
Mexico	504	220	220	0	1,046	826
High-tier tariff/other	980	676	817	141	492	-325
High-tier tariff	928	624	765	141	466	-299
Raw sugar	547	158	299	141	0	-299
Refined sugar	382	197	197	0	197	0
Refined sugar (specialty) 2/	NA	269	269	0	269	0
Other 3/	52	52	52	0	26	-26
Total supply	15,009	14,269	14,381	113	14,062	-319
Total exports	111	25	25	0	25	0
Miscellaneous	-41	0	0	0	0	0
Total deliveries	12,450	12,364	12,364	0	12,364	0
Domestic food and beverage	12,340	12,259	12,259	0	12,259	0
Sugar-containing products re-export program	82	80	80	0	80	0
Polyhydric alcohol, feed, other alcohol	29	25	25	0	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0	0
Total use	12,520	12,389	12,389	0	12,389	0
Ending stocks	2,490	1,880	1,992	113	1,673	-319
Private	2,490	1,880	1,992	113	1,673	-319
Commodity Credit Corporation	0	0	0	0	0	0
Stocks-to-use ratio (percent)	19.9	15.2	16.1	0.9	13.5	-2.6

Note: Totals and monthly changes may not add due to rounding.

1/ The last cane processor in Texas closed in 2023/24. 2/ A separate line for high-tier refined sugar (specialty) was included starting in the July 2025 *World Agricultural Supply and Demand Estimates* (*WASDE*) report. Before the July 2025 *WASDE*, this volume was included in the “high-tier refined sugar” line. 3/ The "Other" line represents the raw sugar equivalent of imported cane molasses, which was added in the *WASDE* report starting in fiscal year 2023/24.

Source: USDA, Economic Research Service using USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*); USDA, Farm Service Agency, *Sweetener Market Data* report; and the USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

Table 2: U.S. sugarbeet and beet sugar production

	2024/25 Final	2025/26 April	2025/26 May	Monthly change	2026/27 May	Annual change
Area planted (1,000 acres)	1,104	1,079	1,079	0	1,063	-16
Planted/Harvested ratio	0.98	0.98	0.98	0.00	0.98	0.00
Area harvested (1,000 acres)	1,086	1,060	1,060	0	1,039	-21
Yield (tons per acre)	32.50	33.2	33.2	0.0	30.2	-2.9
Sugarbeet production (1,000 tons)	35,316	35,140	35,140	0	31,397	-3,743
Sugarbeet shrink (percent)	7.90	9.1	9.1	0.0	7.1	-2.0
Sugarbeet sliced (1,000 tons)	32,527	31,950	31,982	32	29,180	-2,802
Sugar extraction rate from slice (percent)	15.46	14.7	14.6	-0.1	14.8	0.2
Sugar from sliced beets (1,000 STRV)	5,030	4,702	4,662	-39	4,317	-346
Sugar from molasses (1,000 STRV)	324	380	380	0	375	-5
Crop year sugar production (1,000 STRV)	5,354	5,082	5,042	-39	4,692	-351
Aug.–Sep. sugar production (1,000 STRV)	690	706	706	0	654	-52
Aug.–Sep. sugar production, next crop (1,000 STRV)	706	654	654	0	654	0
Sugar from imported beets (1,000 STRV)	NA	30	30	0	30	0
Fiscal year sugar production (1,000 STRV)	5,370	5,060	5,021	-40	4,722	-299

STRV = short tons, raw value; N/A = not applicable.

Note: 1. Crop year is from August to July, while fiscal year is from October to September. Totals and monthly changes may not add due to rounding.

2. Area planted, area harvested, and yield for 2025/26 are based on data from USDA, National Agricultural Statistics Service (NASS). For 2026/27: area planted is based on NASS March 2026 *Prospective Plantings* report; planted-to-harvested ratio is based on a 10-year Olympic average (2016/17–2025/26); and yield is forecast using a regression model, where yield is a function of the NASS planting progress, as of week 18 for the 4 largest sugarbeet-growing U.S. States (Minnesota, North Dakota, Idaho, and Michigan).

3. Sugarbeet shrink and sugar extraction rate from slice for 2025/26 are based on beet processors' estimates submitted to the USDA, FSA, *Sweetener Market Data* (*SMD*) report. For 2026/27, the forecasts for these 2 variables are based on a 10-year average (2016/17–2025/26).

4. Sugar from molasses for 2025/26 are based on the beet processors' submission to *SMD*. The 2026/27 forecast for this variable is assumed to be mostly unchanged from 2025/26.

5. Early sugar production in August–September 2026 is based on a 10-year average (2015/16–2024/25), which is carried over for 2026/27.

6. Sugar from imported beets for 2024/25 is already included in the final crop year production. For 2025/26, this variable is based on processors' submission to *SMD* and is carried over for 2026/27. Sugar production from this component is separated for projection purposes and will be included in the total, as with the prior years, once the full crop year slice is available.

7. Fiscal year sugar production = crop year sugar production minus August to September sugar production plus August to September sugar production of the next crop.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service (NASS); USDA, Farm Service Agency (FSA) *Sweetener Market Data* (*SMD)* report; and the USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report.

Louisiana's cane sugar production in 2026/27 is forecast at 2.146 million STRV, down 86,000 from 2025/26 but reflects 5 years of surpassing Florida (table 3). The main underlying assumption in Louisiana is a continuation of moderate acreage growth of about 5,000 acres, while yield and recovery rate are projected to be more in line with the 5-year average (and thus lower than last year's near record for yield and record for recovery rate). Florida's cane sugar production in 2026/27 is projected at 1.942 million STRV, down 44,000 from 2025/26 as the early February freeze resulted in a loss of 75 days of growth for the new sugarcane planted in the preceding fall for the 2026/27 harvest. While the impact is too early to determine, the sugarcane yield is projected to be 41.75 tons/acre, which is lower than the 10-year average.

Table 3: U.S. sugarcane and cane sugar production

	2021/22	2022/23	2023/24	2024/25	2025/26*	2026/27**
Florida						
Area harvested for sugar (1,000 acres)	388	386	391	381	399	398
Sugarcane yield (tons per acre)	42.4	44.5	44.4	45.1	41.9	41.8
Sugarcane production for sugar (1,000 tons)	16,451	17,177	17,360	17,183	16,718	16,628
Recovery rate (percent)	11.8	11.6	12.0	11.2	11.9	11.7
Sugar production (1,000 STRV)	1,934	1,985	2,079	1,932	1,987	1,942
Louisiana						
Area harvested for sugar (1,000 acres)	466	474	481	498	504	508
Sugarcane yield (tons per acre)	29.0	32.1	29.9	31.1	31.7	30.8
Sugarcane production for sugar (1,000 tons)	13,514	15,215	14,382	15,488	15,977	15,635
Recovery rate (percent)	13.9	13.6	13.2	13.6	14.3	13.7
Crop year sugar production (1,000 STRV)	1,881	2,071	1,904	2,105	2,279	2,146
Sep. sugar production (1,000 STRV)	12	75	6	124	114	67
Sep. sugar production of the next crop (1,000 STRV)	75	6	124	114	67	67
Fiscal year sugar production (1,000 STRV) 1/	1,944	2,001	2,022	2,095	2,232	2,146
Texas 2/						
Area harvested for sugar (1,000 acres)	34	31	17	0	0	0
Sugarcane yield (tons per acre)	30.8	22.6	22.5	0	0	0
Sugarcane production for sugar (1,000 tons)	1,056	698	371	0	0	0
Recovery rate (percent)	11.7	11.0	10.7	0	0	0
Sugar production (1,000 STRV)	124	76	40	0	0	0
United States						
Area harvested for sugar (1,000 acres)	888	891	889	879	903	907
Sugarcane yield (tons per acre)	34.9	37.1	36.1	37.2	36.2	35.6
Sugarcane production for sugar (1,000 tons)	31,021	33,090	32,113	32,671	32,695	32,263
Crop year recovery rate (percent)	12.7	12.5	12.5	12.4	13.0	12.7
Crop year sugar production (1,000 STRV)	3,939	4,132	4,022	4,037	4,266	4,088
Fiscal year sugar production (1,000 STRV)	4,002	4,063	4,141	4,027	4,218	4,088

STRV = short tons, raw value; Sep. = September.
Note: (*) denotes estimates, (**) denotes forecast.

1/ Louisiana's fiscal year sugar production = crop year sugar production minus September sugar production plus September sugar production of the next crop.
2/ The last cane processor in Texas closed in 2023/24.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service and USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report.

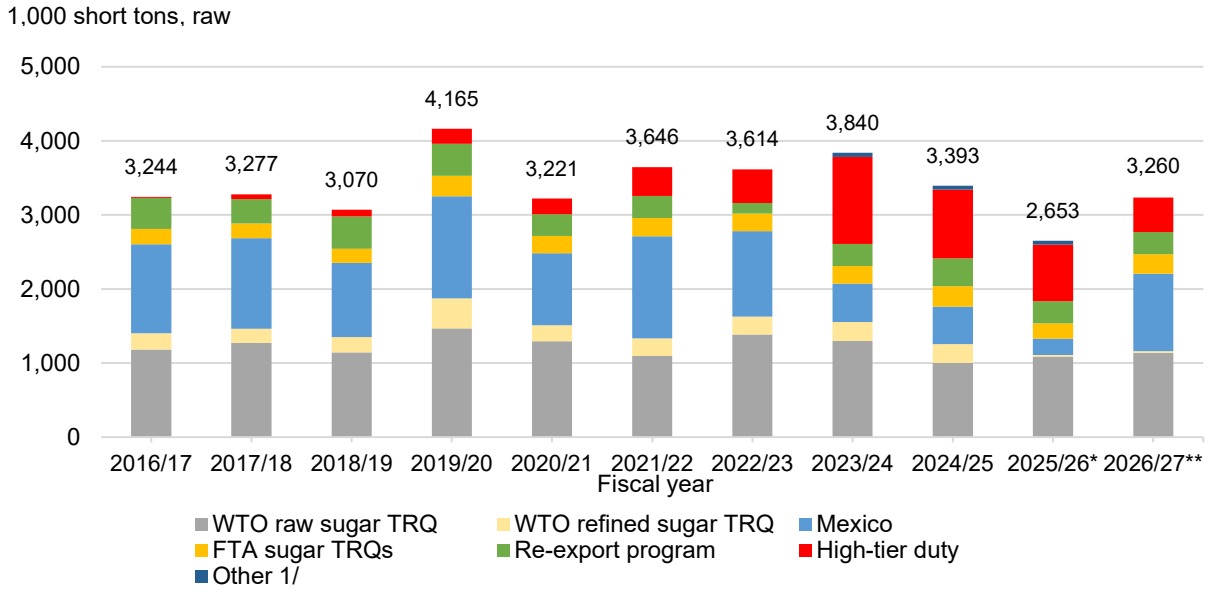
U.S. Sugar Imports for 2026/27 Are Set at Minimum Levels; 2025/26 Sugar Imports Are Adjusted Upwards

U.S. 2026/27 sugar imports are initially set at 3.260 million STRV, 607,000 STRV or 23 percent higher than the 2025/26 estimate (figure 2). Based on minimum commitment levels, the World Trade Organization (WTO) raw sugar tariff-rate quotas (TRQ) are set at 1,137,438 STRV (after assuming the usual 94,000-STRV shortfall), WTO refined sugar TRQ at 24,251 STRV, and free trade agreements TRQ at 260,777 STRV. Re-export program imports are set to 300,000 STRV, equal to 2025/26.

Sugar imports from Mexico (1.046 million STRV) are initially derived to provide a placeholder to achieve a 13.5-percent stocks-to-use ratio for 2026/27. The U.S. Department of Commerce will perform the first official calculation of the 2026/27 U.S. Needs after the July *WASDE* per the U.S.-Mexico sugar suspension agreements.

High-tier duty refined sugar imports and refined (specialty) imports are also set equal to 2025/26 (197,000 STRV and 269,000 STRV, respectively, for a total of 466,000 STRV). The 2026/27 high-tier raw sugar imports component is initially set to zero and will only be reflected in the *World Agricultural Supply and Demand Estimates* (*WASDE)* balance sheet after entering the United States. Sugar from imported molasses is set at 26,000 STRV, about half of 2025/26, based on an official statement released by at least one major importer of such product.

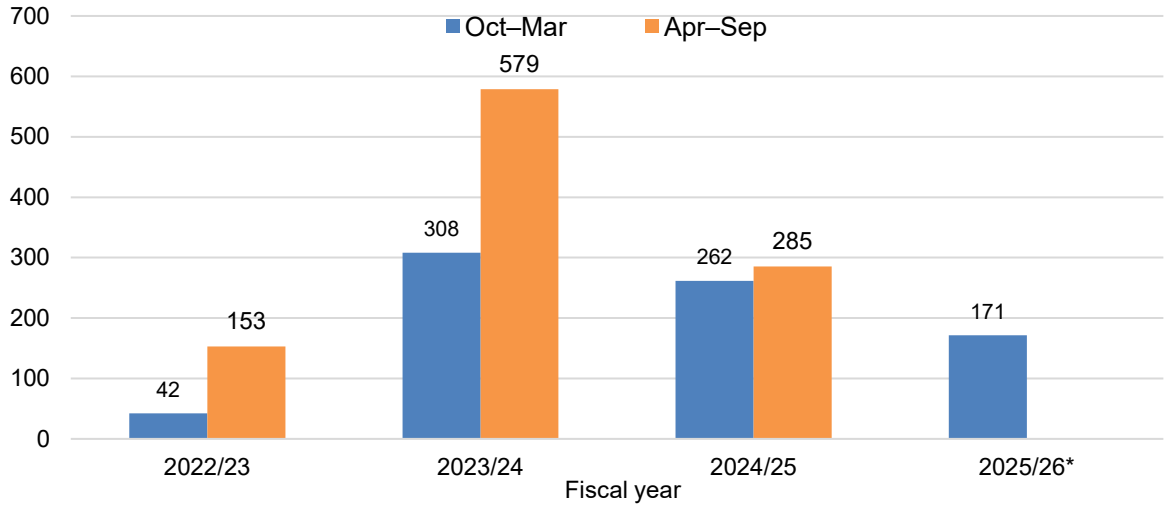
Figure 2
U.S. sugar imports by type



FTA = free trade agreement; WTO = World Trade Organization; TRQ = tariff-rate quota.
Note: (*) denotes estimate, (**) denotes forecast. The data labels at the top of the bars represent total imports.
1/ "Other" represents the raw sugar equivalent of imported cane molasses, which was added in the *WASDE* report starting in fiscal year 2023/24.
Source: USDA, Economic Research Service using USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report; USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

For 2025/26, U.S. sugar imports are raised from last month by 141,000 STRV to 2.653 million but remain 600,000-STRV lower than 2024/25 and the lowest in almost two decades. The upward revision is solely driven by an upward adjustment of 141,000 STRV to high-tier raw sugar imports, which are now estimated at 299,000 STRV. Of the 141,000-STRV increase, 41,000 STRV represents the raw sugar imports that entered since last month; the remaining 100,000-STRV are estimated to enter during the remainder of the fiscal year. Since 2022/23, a larger share of high-tier duty raw sugar imports arrived in the second half of the fiscal year (April–September), before the domestic cane sugar production campaign begins (figure 3).

Figure 3
U.S. imports of high-tier duty raw sugar
1,000 shorts tons, raw value



Note: (*) denotes estimate. The Harmonized Tariff Schedule (HTS) codes for high-tier raw sugar imports are 1701.12.5000, 1701.13.5000, and 1701.14.5000.
Source: USDA, Economic Research Service calculations using data from USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report and U.S Department of Commerce, Bureau of the Census.

U.S. 2025/26 Sugar Deliveries for Human Consumption Are Unchanged; Carried Over to 2026/27

U.S. 2025/26 sugar deliveries for food and beverage use are unchanged at 12.259 million STRV, down 80,000 STRV (0.7 percent) from last year's 12.340 million (figure 4). This estimate is carried over to 2026/27 reflecting an uncertainty in sugar demand given growing inflation concerns and overall reduction in food and beverage consumption due to a shift in eating habits amid the rising adoption of glucagon-like peptide-1 (GLP-1) drugs and changes in food consumption recommendations.

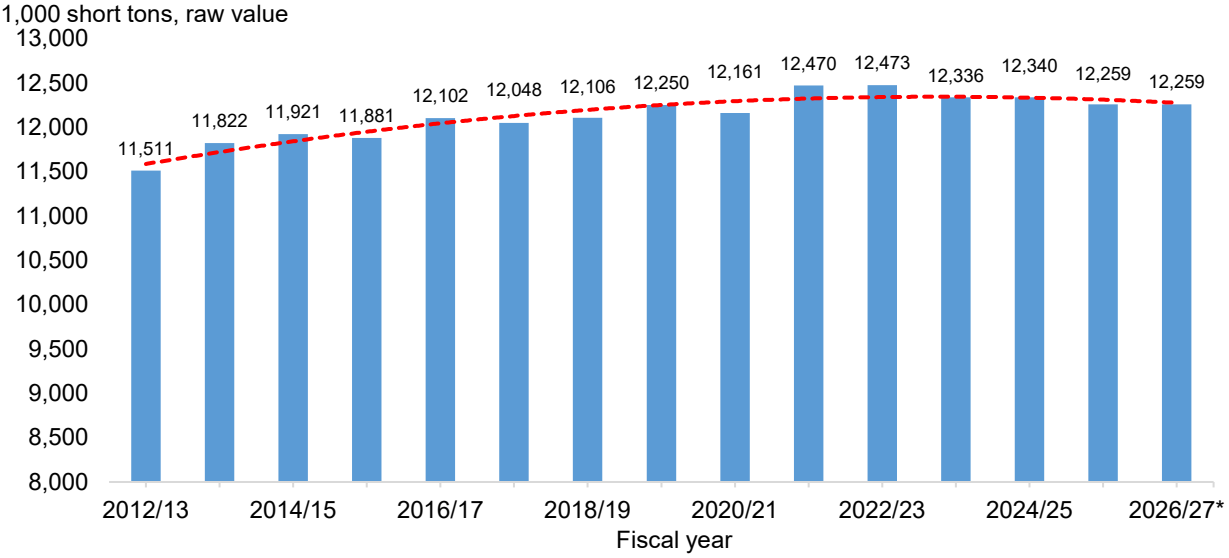
Between October 2025–March 2026, beet sugar processors continue to gain ground, delivering above the 5-year monthly average since January, based on the *SMD* data. Cumulative beet sugar deliveries totaled 2.503 million STRV, about 142,000-STRV higher than the same period last year. Cane refiners had a strong March, but their cumulative deliveries over the past 6 months (3.241 million STRV) are remain behind last year's pace.

On the other hand, non-reporter deliveries (also known as direct consumption imports, or DCI[1]) in March were -89,000 STRV, bringing the cumulative volume down to 253,000, the lowest for this 6-month period since 2020/21. The negative number is a result of this category being a derived calculation using 2 USDA data sources—FSA's *SMD* report and Foreign Agricultural Service's (FAS) *U.S. Sugar Monthly Import and Re-Exports* report—that differ in terms of timing of data availability. Historically, a negative month for DCI will be eventually offset in succeeding months.

Figure 4

U.S. sugar deliveries for food and beverage use

1,000 short tons, raw value



Note: (*) denotes forecast. The dashed red line represents the long-term trend line.

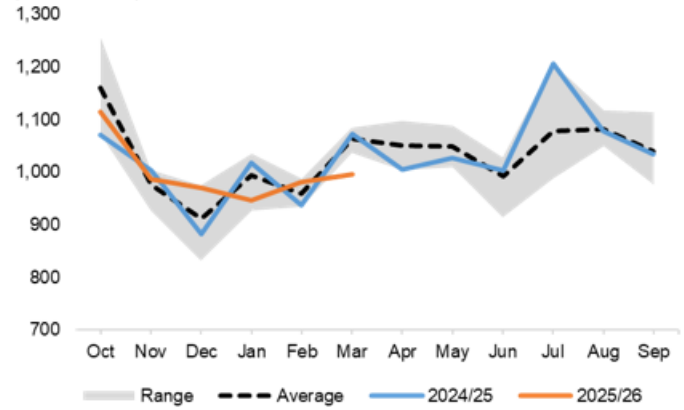
Source: USDA, Economic Research Service calculations using data from USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report and USDA, Farm Service Agency, *Sweetener Market Data* report.

[1] Sugar deliveries for human consumption are equal to the sum of beet and cane sugar deliveries plus DCI. DCI is also referred to as non-reporter deliveries. "Non-reporters" do not report to *SMD*, as opposed to the reporters (comprised of beet processors and cane refiners), and their imports are assumed to be refined sugar for direct consumption or delivery to an end-user. Non-reporter imports are calculated by subtracting the reporters' imports in the *SMD* report from the total imports in the USDA's Foreign Agricultural Service's (FAS) *U.S. Sugar Monthly Import and Re-Exports* report. The formula is: DCI = FAS total imports – *SMD* cane refiner imports.

Figure 5

U.S. total sugar deliveries for food and beverage use, monthly, fiscal years 2020/21–2025/26

1,000 short tons, raw value

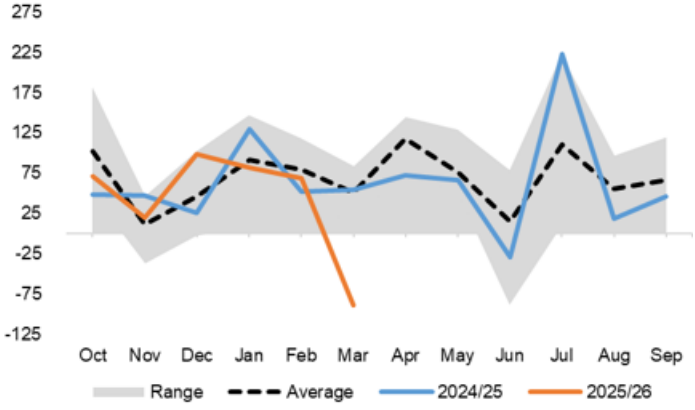


Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Figure 6

U.S. non-reporter sugar deliveries, monthly, fiscal years 2020/21–2025/26

1,000 short tons, raw value

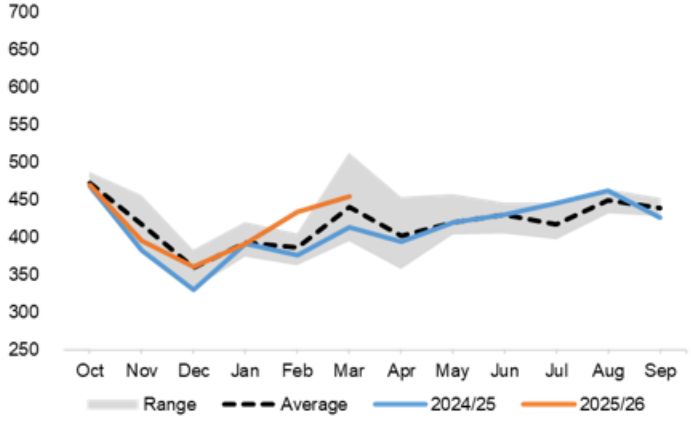


Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Figure 7

U.S. refined beet sugar deliveries, monthly, fiscal years 2020/21–2025/26

1,000 short tons, raw value

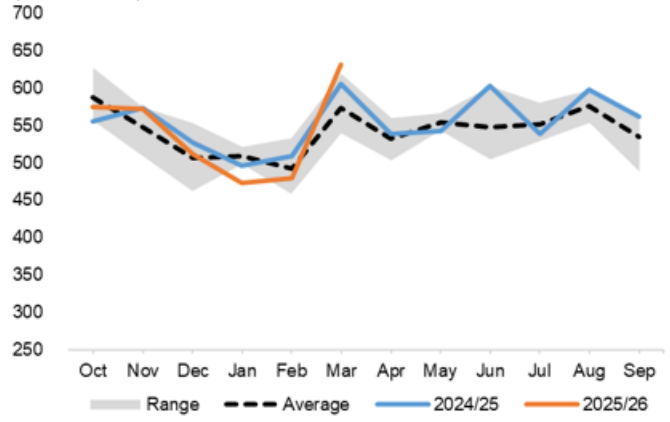


Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Figure 8

U.S. refined cane sugar deliveries, monthly, fiscal years 2020/21–2025/26

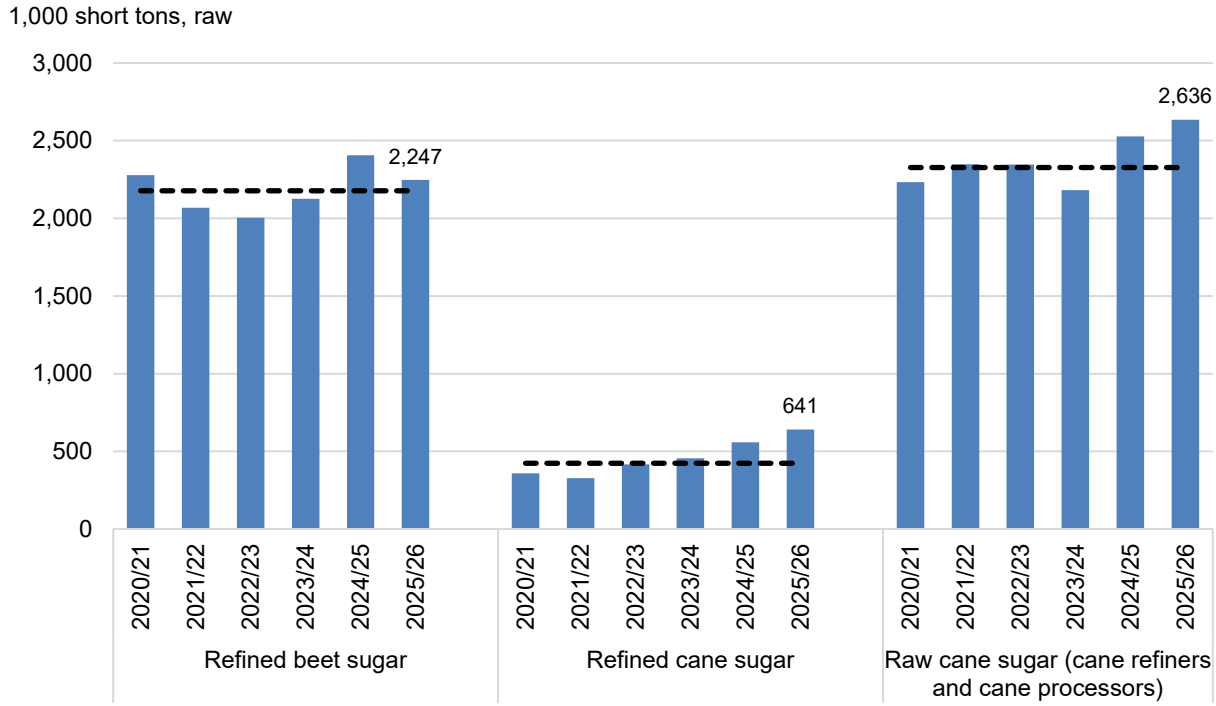
1,000 short tons, raw value



Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Given the preceding months' uptick in beet sugar deliveries, beet sugar inventories as of March 31 (2.247 million STRV) have finally fallen below last year's volume and edging closer to the 5-year average (figure 9). Refined cane sugar inventories (641,000 STRV) remain at record high since 2013/14. Raw cane sugar inventories held jointly by cane processors and cane refiners (2.636 million STRV) are also at record volume. Thus, total sugar stocks as of March 31 (5.524 million STRV) remain at a record level but have at least come down closer to last year's (5.492 million STRV) at this time.

Figure 9
U.S. ending stocks of sugar as of March 31, by type, fiscal years 2020/21–2025/26



Note: The dashed horizontal line represents the 5-year average.
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Mexico's Sugar Outlook

Mexico's 2026/27 Sugar Production Is Slightly Lower From 2025/26; Increased for 2025/26

Mexico's 2026/27 sugar production is forecast at 5.142 million metric tons (MT), actual weight, about 37,000 MT lower (0.7 percent) than 2025/26, which is adjusted upwards to 5.179 million MT based on pace to date (table 4). The 2026/27 forecast is based on the April 2026 USDA, FAS, Mexico City Post's *Sugar Annual* report, which projects area harvested at 738,000 hectares, reflecting a recovery from this year's campaign. The Post's forecasts for sugarcane yield (65.4 MT per hectare) and sugar recovery (10.66 percent) are both lower than 2025/26 and instead closer to the 5-year average. Post noted that while seasonal rains during mid-2025 alleviated the drought conditions experienced during the prior 2 years and area is expected to increase, yields and sugar recovery can be impacted as farmers are likely to face constraints from recent increases in global fertilizer prices and other input costs.

For 2025/26, Mexico's sugar production is raised 54,000 MT from last month to 5.179 million on upward adjustments to sugarcane yield and sucrose recovery that continue to be higher-than-expected as the harvest campaign reaches the final 6–8 weeks. As of week 31 (week that ended on May 2), 5 of the 47 mills are done. Cumulative harvested area still lags last year's pace but is more than offset by stronger sugarcane field yield and extraction rate (table 5). As such, sugar production to date has surpassed last year's pace by 5 percent.

Mexico's 2026/27 domestic sugar consumption is forecast at 3.929 million MT, reflecting a 2-percent decrease due to expected impact of tax on sweetened beverages. The other delivery component—deliveries to food and beverage manufacturing companies that participate in the Industria Manufacturera, Maquiladora y de Servicios de Exportación (IMMEX)—are forecast at 297,000 MT, about the same as 2025/26. Mexico's sugar exports in 2026/27, which are mostly destined for the United States, are projected at 895,000 MT. Ending stocks for 2026/27 are forecast to continue including a 150,000-MT of low-polarity sugar (less than 99.2 polarity) that is set aside and readily available for exports to the United States during the first quarter of the fiscal year (October–December 2026), when Mexico's harvest campaign is just starting.

Table 4: Mexico's sugar supply and use by fiscal year (October−September), metric tons, actual weight

	2024/25	2025/26			2026/27	
	Final	April	May	Monthly change	May	Annual change
Beginning stocks	1,418	1,123	1,123	0	1,068	-55
Production	4,771	5,125	5,179	54	5,142	-37
Imports	167	52	52	0	28	-24
Imports for consumption	154	39	39	0	14	-25
Imports for sugar-containing product exports (IMMEX)	13	13	13	0	14	2
Total supply	6,355	6,300	6,354	54	6,238	-116
Disappearance						
Human consumption	3,901	4,001	4,001	0	3,929	-72
For sugar-containing product exports (IMMEX)	323	296	296	0	297	2
Other deliveries and end-of-year statistical adjustment	-14	0	0	0	0	0
Total	4,209	4,297	4,297	0	4,226	-71
Exports	1,023	935	989	54	895	-94
Exports to the United States and Puerto Rico	432	188	188	0	895	707
Exports to other countries 1/	591	747	801	54	0	-801
Total use	5,232	5,232	5,286	54	5,121	-165
Ending stocks	1,123	1,068	1,068	0	1,117	49
Domestic	973	918	918	0	967	49
United States 2/	150	150	150	0	150	0
Stocks-to-human consumption (percent)	28.8	26.7	26.7	0.0	28.4	1.7
Stocks-to-use (percent)	21.5	20.4	20.2	-0.2	21.8	1.6
High-fructose corn syrup (HFCS) consumption (dry weight)	1,639	1,640	1,620	-20	1,600	-20

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

Note: Totals and monthly changes may not add due to rounding.

1/ Includes exports participating in the U.S. re-export programs.
2/ Starting in May 2025, a new line for "sugar inventory with polarity of less than 99.2 for exports to the United States" was added. This addition was done after Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) included this information in its fourth iteration of the *2024/25 National Sugar Balance* report, published on May 6, 2025.

Source: USDA, Economic Research Service using USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report; Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Table 5: Mexico's cumulative sugar production through week 31 of the harvest season

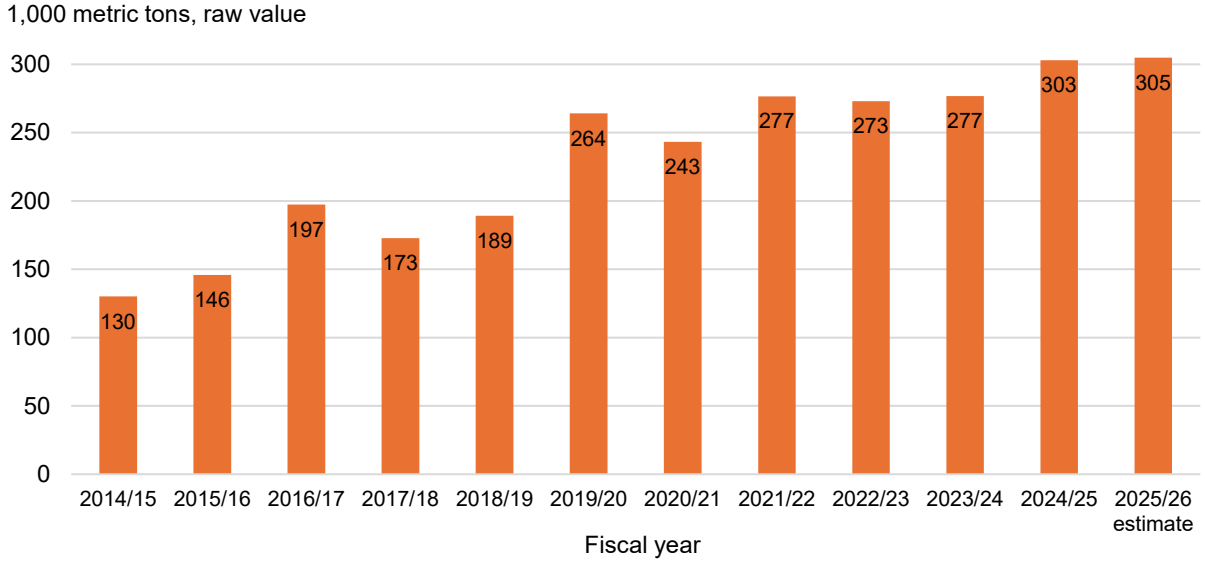
	Pace to date		Over-the-year difference (2025/26 versus 2024/25)	
	2024/25	2025/26	Level	Percent
Area harvested (1,000 ha)	651	598	-53	-8
Sugarcane processed (1,000 MT)	42,066	42,583	517	1
Sugarcane yield (MT per ha)	64.6	71.2	6.6	10
Extraction rate (percent)	10.5	10.8	0.4	4
Agro-industrial yield (MT sugar per ha)	6.8	7.7	1.0	14
Sugar production (1,000 metric tons)	4,401	4,617	216	5
By type:				
Refinada	868	911	43	5
Estándar	3,127	3,382	256	8
Blanco especial	56	57	1	3
Mascabado	0	20	20	NA
Polarity less than 99.2	351	246	-105	-30

ha = hectares; MT = metric tons.
Note: Totals and monthly changes may not add due to rounding.
Source: USDA, Economic Research Service calculations using data from Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

U.S. Organic Sugar Sources

This section updates the May 2025 *Sugar and Sweeteners Outlook* report on the domestic and foreign sources of U.S. organic sugar supply and includes the estimates for fiscal year 2025/26. Domestic organic sugar production in Florida, which averaged about 20,000 metric tons, raw value (MTRV) in the last 5 years (2019/20–2024/25), is combined with organic sugar imports using the applicable Harmonized Tariff Schedule (HTS) codes[2] to determine the U.S. organic sugar supply. For 2025/26, U.S. organic sugar supply is estimated at 305,000 MTRV, about the same from 2024/25 (figure 10, table 6). U.S. organic sugar supply in 2025/26, which is mostly imported, has more than doubled since 2014/15, reflecting growing consumer demand for processed organic products. For 2025/26, an estimated 93 percent of U.S. organic supply is imported (table 6).

Figure 10
U.S. total organic supply from domestic production and imports



Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service calculations using data from Euromonitor; U.S. Department of Homeland Security, Customs and Border Protection; and U.S. Department of Commerce, Bureau of the Census.

[2] The U.S. International Trade Commission's Harmonized Tariff Schedule (HTS) codes for organic sugar are:

- 1701.14.10.20 for certified organic raw cane sugar (i.e., under the WTO raw sugar TRQ) established on January 1, 2020;
- 1701.99.10.15 for certified organic specialty sugar (i.e., under the WTO refined sugar TRQ) established on July 1, 2016; and
- 1701.99.50.15 for certified organic specialty sugar (i.e., over the WTO refined sugar TRQ and thus, subject to the high-tier duty of 16.21 cents per pound) established on January 1, 2020.

There is currently no associated HTS code established for certified over-quota organic raw cane sugar (i.e., over the WTO raw sugar TRQ). If over-quota certified organic raw cane sugar is imported, the most likely HTS codes used are 1701.13.5000 and 1701.14.5000, but these codes are not specific to organic raw cane sugar; instead, these codes are generally used for raw cane sugar imports that are subject to the high-tier duty (15.36 cents per pound).

Table 6: U.S. organic sugar supply, by source

Fiscal year	Domestic production 1/	Imports						Total
		Specialty TRQ 2/	Mexico 3/	WTO TRQ raw 2/	WTO TRQ refined 2/	FTA TRQ 2/	Over-quota (high-tier) 3/	
Metric tons, raw value								
2014/15	3,000	120,828	0	5,617	0	455	200	130,100
2015/16	3,600	125,628	0	13,130	0	3,066	392	145,816
2016/17	4,392	179,262	0	11,263	0	2,312	200	197,429
2017/18	5,648	160,002	0	6,148	0	595	424	172,818
2018/19	7,748	169,743	0	8,991	0	862	1,800	189,144
2019/20	11,493	168,059	143	22,956	55,000	0	6,393	264,044
2020/21	18,000	178,176	0	27,005	2,118	3,906	14,182	243,386
2021/22	18,630	199,737	181	19,963	3,417	1,990	32,684	276,602
2022/23	19,675	201,365	306	18,037	4,209	3,389	25,956	272,937
2023/24	22,527	211,262	0	7,693	1,320	4,060	29,865	276,727
2024/25	20,075	208,261	0	8,585	935	7,214	57,998	303,068
2025/26 estimated	20,075	1,650	0	30,000	5,200	4,000	244,000	304,925
Share (percent)								
2014/15	2	93	0	4	0	0	0	100
2015/16	2	86	0	9	0	2	0	100
2016/17	2	91	0	6	0	1	0	100
2017/18	3	93	0	4	0	0	0	100
2018/19	4	90	0	5	0	0	1	100
2019/20	4	64	0	9	21	0	2	100
2020/21	7	73	0	11	1	2	6	100
2021/22	7	72	0	7	1	1	12	100
2022/23	7	74	0	7	2	1	10	100
2023/24	8	76	0	3	0	1	11	100
2024/25	7	69	0	3	0	2	19	100
2025/26 estimated	7	1	0	10	2	1	80	100

WTO = World Trade Organization, TRQ = tariff-rate quota; FTA = free trade agreements.
Note: There were back-year revisions to domestic organic production for 2022/23–2024/25.
Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service calculations using data 1/ Euromonitor; 2/ U.S. Department of Homeland Security, Customs and Border Protection; and 3/ U.S. Department of Commerce, Bureau of the Census.

The 2 major import sources historically are the U.S. refined (specialty) sugar tariff-rate quota (TRQ) and the over-quota certified organic imports paying a high duty. In the last 5 fiscal years (2021/22–2025/26), these 2 categories comprised 85 percent of the total supply.

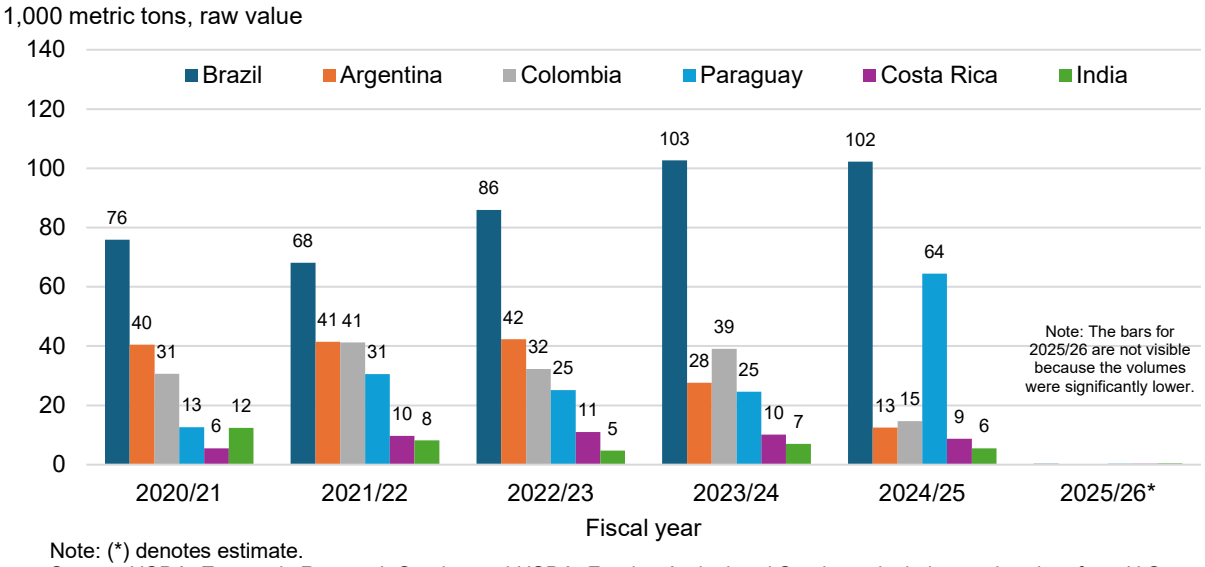
Specialty sugar tariff-rate quota: The specialty sugar TRQ imports, which are 99-percent certified organic, traditionally have been the main source of U.S. organic sugar imports, averaging about 73 percent in the previous 5 years (2020/21–2024/25). This import category is typically comprised of 2 components—the minimum volume (about 1,656 MTRV) and an additional quantity that was historically announced by USDA every fiscal year. The latter component comprised the majority, averaging about 200,000 MTRV

in the last 5 years (2020/21–2024/25) and growing by about 4 percent annually over the same period.

In 2025/26, no additional specialty sugar TRQ was added to the minimum volume of 1,656-MTRV quota. To fill the supply gap, imports of high-tier organic sugar in 2025/26 are estimated to increase significantly to a record 244,000 MTRV, representing 80 percent of U.S. organic supply. Similarly, the 2025/26 imports of organic sugar under the World Trade Organization (WTO) TRQ raw cane sugar quota are expected to increase to a record 30,000 MTRV, accounting for 10 percent of U.S. organic supply, to offset the absence of the additional refined (specialty) sugar TRQ. The other organic sugar import categories are certified organic sugar imported under the WTO global refined TRQ (5,200 MTRV or 2 percent of U.S. total organic sugar supply) and under the Free Trade Agreements (FTA) TRQ (4,000 MTRV or 1 percent). The subsequent sections further describe these other foreign sources of organic sugar.

During 2024/25, of the 208,000-MTRV specialty sugar TRQ imports (minimum and additional specialty combined), Brazil supplied about half, followed by Paraguay (31 percent), Colombia (7 percent), and Argentina (6 percent) (figure 11). In 2024/25, the top 5 ports of entry for certified organic sugar accounted for about 75 percent of specialty certified organic imports, up 6 percentage points from 2023/24. These top 5 ports were Houston, Texas (28 percent), followed by New York, New York/Newark, New Jersey (15 percent), Buffalo, New York (14 percent), Baltimore, Maryland (10 percent), and Stockton, California (8 percent). The next 5 ports represented 15 percent of specialty sugar TRQ entries and the remaining 9 percent were entered in other ports.

Figure 11
U.S. organic sugar imports under the U.S. refined (specialty) sugar tariff-rate quota from major sources



Note: (*) denotes estimate.
Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service calculations using data from U.S. Department of Homeland and Security, Customs and Border Protection and U.S Department of Commerce, Bureau of the

Over-quota (high-tier) organic sugar: U.S. imports of certified organic sugar paying the high-tier duty have expanded rapidly in the last few years, from 1,800 MTRV in 2018/19 to about 58,000 MTRV in 2024/25. With no USDA announcement of additional specialty sugar in 2025/26, imports of high-tier certified organic sugar are estimated to rise significantly to 244,000 MTRV, making it the largest organic sugar import category for the first time and comprising 80 percent of U.S. total organic supply.

The USDA, Foreign Agricultural Service's May 2026 *U.S. Sugar Monthly Import and Re-exports report* (using U.S. Census Bureau trade data) indicates that about 187,000 MTRV of the 2025/26 high-tier certified organic estimate (244,000 MTRV), or 76 percent (187,000 MTRV or 173,000 metric tons, commercial weight), have already been imported between October 2025–March 2026.

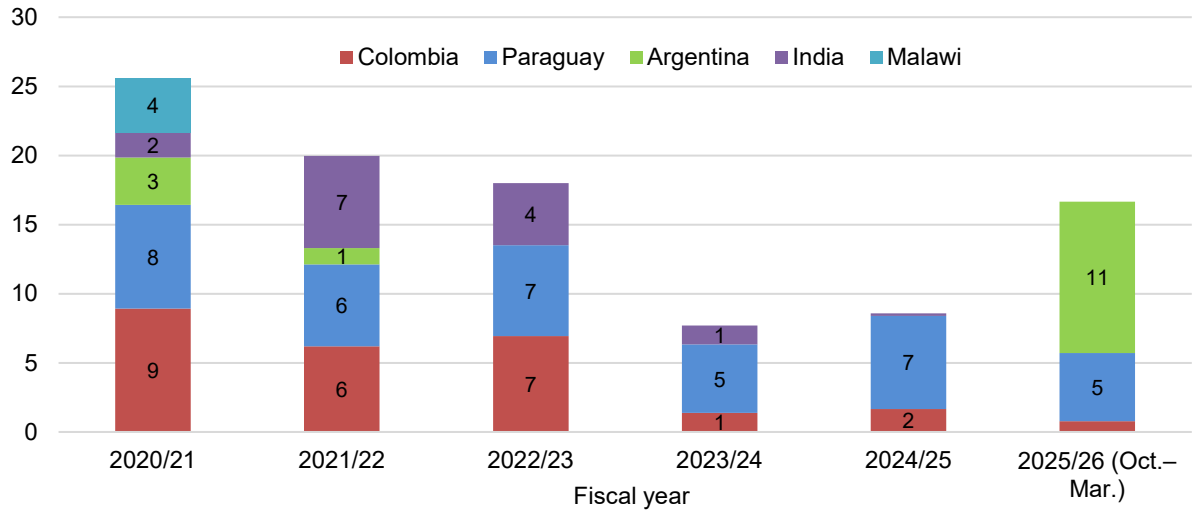
U.S. imports of high-tier certified organic sugar are sourced from just a handful of countries. Through March 2026, more than 90 percent of the 187,000 MTV was supplied by 3 countries—Brazil (81,000 MTRV), Argentina (68,000 MTRV), and Paraguay (21,000 MTRV). The top 3 ports of entry also comprised more than 90 percent of high-tier organic sugar imports to date—Houston-Galveston, Texas (81,000 MTRV); San Francisco,

California (68,000 MTRV); and New York City, New York (21,000 MTRV).

WTO raw cane sugar TRQ: U.S. 2025/26 imports of raw organic sugar entered under the WTO raw cane sugar TRQ are estimated at 30,000 MTRV or 10 percent of the U.S. organic supply. The 30,000-MTRV estimate is more than double the 2024/25 level, making it the second largest source behind high-tier organic sugar imports, mainly due to a surge of imports from Argentina (figure 12). To date (October 2025–March 2026), FAS estimates that about 17,000 MTRV or of the 30,000-MTRV estimate have already entered, surpassing the total from the last 2 years.

Figure 12
U.S. imports of organic raw sugar under the WTO raw cane sugar TRQ, by major origin

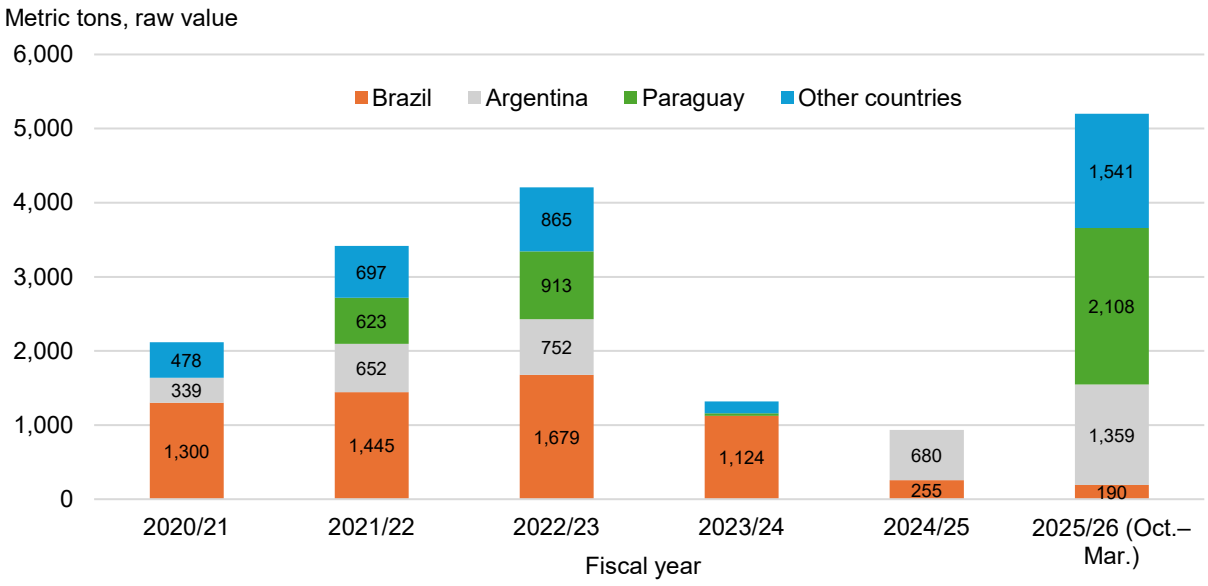
1,000 metric tons, raw value



WTO = World Trade Organization; TRQ = tariff-rate quota.
Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service calculations using data from U.S. Department of Homeland and Security, Customs and Border Protection and U.S Department of Commerce, Bureau of the Census.

WTO global refined sugar TRQ: For 2025/26, certified organic sugar imports under the WTO global refined sugar TRQ are estimated at 5,200 MTRV, higher than the previous 5-year average (2,400 MTRV) but well below the record volume imported in 2019/20 (55,000 MTRV) (figure 13). If realized, 2025/26 imports for this category would account for 2 percent of U.S. total organic supply. Between October 2025–March 2026, the main import sources have been Paraguay (2,100 MTRV) and Argentina (1,400 MTRV) as imports from Brazil (190 MTRV) declined partly from tariff imposition; the other countries included India (800 MTRV) and Colombia (740 MTRV).

Figure 13
U.S. imports of organic sugar under the WTO global refined TRQ, by major origin



WTO = World Trade Organization; TRQ = tariff-rate quota.
Source: USDA, Economic Research Service and USDA, Foreign Agricultural Service calculations using data from U.S. Department of Homeland and Security, Customs and Border Protection and U.S Department of Commerce, Bureau of the Census.

Free trade agreements (FTA): U.S. imports of organic sugar under free trade agreement provisions are minimal and are mostly from Colombia. For 2025/26, organic sugar imports for this category are estimated at 4,000 MTRV (1 percent of total organic supply), which is about the same as the 5-year average. Other potential organic sugar import sources under the FTA include Costa Rica, Panama, and Peru.

Suggested Citation

Abadam, V., & Diaby, S. (2026). *Sugar and sweeteners outlook: May 2026* (Report No. SSS-M-453). U.S. Department of Agriculture, Economic Research Service.