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Sugar and Sweeteners Outlook: June 2026

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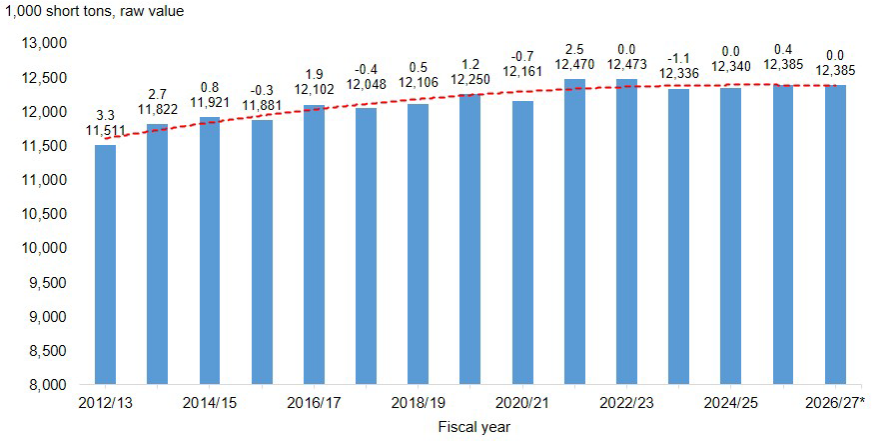
U.S. 2026/27 Sugar Deliveries Are Up; Mexico's 2026/27 Sugar Output Is Raised

The U.S. fiscal year 2026/27 sugar supply is forecast at 14.174 million short tons, raw value (STRV), up 112,000 STRV from last month on larger beet and cane sugar production more than offsetting lower beginning stocks. Sugar use is raised 126,000 STRV to 12.515 million STRV, solely on increased deliveries for human consumption. This increase is in line with the upward adjustment made in 2025/26 on stronger-than-expected domestic sugar deliveries and direct consumption imports during the first 7 months of the fiscal year. The resulting 2026/27 ending stocks are 1.660 million STRV, down 13,000 STRV from last month, and the corresponding stocks-to-use ratio is 13.3 percent.

Mexico's 2026/27 sugar production is raised 141,000 metric tons, actual weight to 5.283 million metric tons based on USDA, Foreign Agricultural Service's Mexico City Post.

Figure 1
U.S. sugar deliveries for food and beverage use



Note: (*) denotes forecast. The dashed red line represents the long-term trend line. The numbers at the top row of the bars represent the annual growth rates (percent).
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.

U.S. Sugar Outlook

U.S. Sugar Production Is Raised for 2026/27, Lowered for 2025/26

U.S. sugar production in fiscal year 2026/27 is raised 254,000 short tons, raw value (STRV) from last month to 9.063 million, as both beet and cane sugar production are increased (table 1). However, this production outlook remains the lowest since 2019/20 and would be about 2 percent below the revised fiscal year 2025/26 estimate. The 2026/27 beet sugar output is up 217,000 STRV to 4.939 million STRV but remains 1 percent lower than 2025/26 and the lowest since the freeze-reduced output in 2019/20. Cane sugar production is increased 37,000 STRV to 4.125 million STRV, but remains 2 percent lower than 2025/26, solely on a larger production outlook for Florida.

The 2026/27 projection for sugarbeet yield is raised to 31.94 tons (table 2), based on more area planted by week 19 (week ending May 10, 2026) in the USDA, National Agricultural Statistics Service (NASS) *Crop Progress* than projected last month. This year, planting schedules were delayed in several beet growing areas due to weather issues. Planting progress and yield have strong positive correlation, with the week 19 timeframe considered a critical cut-off point to achieve optimal crop development and to allow sugarbeets sufficient time to deposit sugar before harvest.

Sugarbeet acreage is unchanged, as NASS will provide its first official estimate of area planted and projected area harvested in the June 30 *Acreage* report, as well as its initial yield estimate in the August 12 *Crop Production* report. Based on the initial beet processors' estimates submitted in the June USDA, Farm Service Agency, *Sweetener Market Data* (SMD) report, sugarbeet shrink is increased to 8.12 percent and sugar from desugared molasses increased to 400,000 STRV.

Florida fiscal year 2026/27 cane sugar production is raised 37,000 STRV from last month to 1.979 million, about the same as 2025/26, after taking into consideration cane processors' reassessment of the effect of the February freeze reflected in the *SMD*-submitted initial forecast (table 3). On the other hand, Louisiana fiscal year 2026/27 cane sugar production is unchanged at 2.146 million STRV, down 86,000 from 2025/26, but reflects 5 years of surpassing Florida. 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). For cane, NASS will publish the

initial area harvested in the June *Crop Production* report and the yield in the August *Crop Production* report.

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	May	June	Monthly change	May	June	Monthly change
Beginning stocks	2,220	2,490	2,490	0	1,992	1,851	-141
Total production	9,397	9,239	9,223	-16	8,810	9,063	254
Beet sugar	5,370	5,021	5,009	-12	4,722	4,939	217
Cane sugar	4,027	4,218	4,214	-4	4,088	4,125	37
Florida	1,932	1,987	1,983	-4	1,942	1,979	37
Louisiana	2,095	2,232	2,232	0	2,146	2,146	0
Texas 1/	0	0	0	0	0	0	0
Total imports	3,393	2,653	2,653	0	3,260	3,260	0
Tariff-rate quota imports	1,534	1,316	1,316	0	1,422	1,422	0
Other program imports	373	300	300	0	300	300	0
Non-program imports	1,485	1,037	1,037	0	1,538	1,538	0
Mexico	504	220	220	0	1,046	1,046	0
High-tier tariff/other	980	817	817	0	492	492	0
High-tier tariff	928	765	765	0	466	466	0
Raw sugar	547	299	299	0	0	0	0
Refined sugar	382	197	197	0	197	197	0
Refined sugar (specialty) 2/	NA	269	269	0	269	269	0
Other 3/	52	52	52	0	26	26	0
Total supply	15,009	14,381	14,366	-16	14,062	14,174	112
Total exports	111	25	25	0	25	25	0
Miscellaneous	-41	0	0	0	0	0	0
Total deliveries	12,450	12,364	12,490	126	12,364	12,490	126
Domestic food and beverage	12,340	12,259	12,385	126	12,259	12,385	126
Sugar-containing products re-export program	82	80	80	0	80	80	0
Polyhydric alcohol, feed, other alcohol	29	25	25	0	25	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0	0	0
Total use	12,520	12,389	12,515	126	12,389	12,515	126
Ending stocks	2,490	1,992	1,851	-141	1,673	1,660	-13
Private	2,490	1,992	1,851	-141	1,673	1,660	-13
Commodity Credit Corporation	0	0	0	0	0	0	0
Stocks-to-use ratio (percent)	19.9	16.1	14.8	-1.3	13.5	13.3	-0.2

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*) report; 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 May	2025/26 June	Monthly change	2026/27 May	2026/27 June	Monthly change
Area planted (1,000 acres)	1,104	1,079	1,079	0	1,063	1,063	0
Planted/Harvested ratio	0.98	0.98	0.98	0.00	0.98	0.98	0.00
Area harvested (1,000 acres)	1,086	1,060	1,060	0	1,039	1,038	-1
Yield (tons per acre)	32.50	33.2	33.2	0.0	30.2	31.9	1.7
Sugarbeet production (1,000 tons)	35,316	35,140	35,140	0	31,397	33,172	1,774
Sugarbeet shrink (percent)	7.90	9.1	9.3	0.2	7.1	8.1	1.1
Sugarbeet sliced (1,000 tons)	32,527	31,982	31,901	-81	29,180	30,478	1,298
Sugar extraction rate from slice (percent)	15.46	14.6	14.6	0.0	14.8	14.8	0.0
Sugar from beets sliced (1,000 STRV)	5,030	4,662	4,651	-12	4,317	4,509	192
Sugar from molasses (1,000 STRV)	324	380	380	0	375	400	25
Crop year sugar production (1,000 STRV)	5,354	5,042	5,031	-12	4,692	4,909	217
Aug.–Sep. sugar production (1,000 STRV)	690	706	706	0	654	654	0
Aug.–Sep. sugar production of next crop (1,000 STRV)	706	654	654	0	654	654	0
Sugar from imported beets (1,000 STRV)	0	30	30	0	30	30	0
Fiscal year sugar production (1,000 STRV)	5,370	5,021	5,009	-12	4,722	4,939	217

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. For 2025/26, area planted, area harvested, and yield 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, shrink is based on processor's estimates and extraction rate is based on a 10-year average (2016/17–2025/26).

4. Sugar from molasses for 2025/26 and 2026/27 is based on the beet processors' submission to *SMD*.

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.

For fiscal year 2025/26, U.S. sugar production is decreased 16,000 STRV from last month to 9.223 million STRV. With the slicing campaign at the end, beet sugar production is reduced 12,000 STRV to 5.009 million STRV, on adjustments to sugarbeet shrink and the volume of sugarbeets sliced. Cane sugar output in Florida (where the harvest campaign has recently ended) is reduced 4,000 STRV to 4.214 million, based on cane processors' *SMD* reporting.

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

	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*	2026/27**
Florida							
Area harvested for sugar (1,000 acres)	409	388	386	391	381	399	398
Sugarcane yield (tons per acre)	44.3	42.4	44.5	44.4	45.1	41.9	43.1
Sugarcane production for sugar (1,000 tons)	18,119	16,451	17,177	17,360	17,183	16,718	17,167
Recovery rate (percent)	11.5	11.8	11.6	12.0	11.2	11.9	11.5
Sugar production (1,000 STRV)	2,090	1,934	1,985	2,079	1,932	1,983	1,979
Louisiana							
Area harvested for sugar (1,000 acres)	461	466	474	481	498	504.000	508
Sugarcane yield (tons per acre)	32.9	29.0	32.1	29.9	31.1	31.700	30.8
Sugarcane production for sugar (1,000 tons)	15,167	13,514	15,215	14,382	15,488	15,977	15,635
Recovery rate (percent)	13.0	13.9	13.6	13.2	13.6	14.262	13.7
Crop year sugar production (1,000 STRV)	1,976	1,881	2,071	1,904	2,105	2,279	2,146
Sep. sugar production (1,000 STRV)	70	12	75	6	124	114	67
Sep. sugar production of the next crop (1,000 STRV)	12	75	6	124	114	67	67
Fiscal year sugar production (1,000 STRV) 1/	1,918	1,944	2,001	2,022	2,095	2,232	2,146
Texas 2/							
Area harvested for sugar (1,000 acres)	33	34	31	17	0	0	0
Sugarcane yield (tons per acre)	31.5	30.8	22.6	22.5	0	0	0
Sugarcane production for sugar (1,000 tons)	1,052	1,056	698	371	0	0	0
Recovery rate (percent)	12.7	11.7	11.0	10.7	0	0	0
Sugar production (1,000 STRV)	134	124	76	40	0	0	0
United States							
Area harvested for sugar (1,000 acres)	903	888	891	889	879	903	907
Sugarcane yield (tons per acre)	38.0	34.9	37.1	36.1	37.2	36.2	36.2
Sugarcane production for sugar (1,000 tons)	34,338	31,021	33,090	32,113	32,671	32,695	32,802
Crop year recovery rate (percent)	12.2	12.7	12.5	12.5	12.4	13.0	12.6
Crop year sugar production (1,000 STRV)	4,200	3,939	4,132	4,022	4,037	4,261	4,125
Fiscal year sugar production (1,000 STRV)	4,141	4,002	4,063	4,141	4,027	4,214	4,125

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

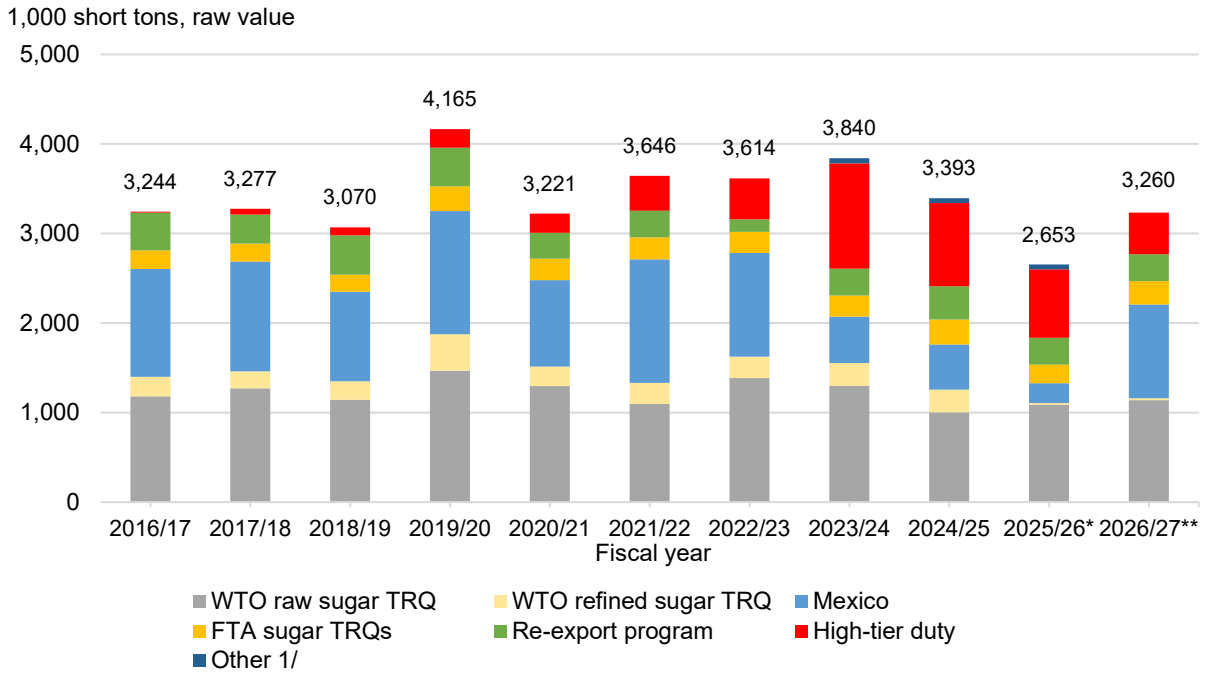
1/ Louisiana's fiscal year sugar production = crop year sugar production minus September sugar production plus September sugar production of the next crop.
2/ The last cane processor in Texas closed in 2023/24.

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 2025/26 and 2026/27 Are Unchanged

The projected U.S. 2026/27 sugar imports are unchanged at 3.260 million STRV, about 607,000 STRV or 23 percent higher than the 2025/26 estimate, which is also the same as last month (figure 2). The projected U.S. 2026/27 sugar imports from Mexico (1.046 million STRV) are unchanged. The U.S. Department of Commerce will perform its first official calculation of the 2026/27 U.S. Needs after the July *WASDE* report, per the terms of the U.S.-Mexico sugar suspension agreements.

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.

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

U.S. 2025/26 sugar deliveries for food and beverage use are increased 126,000 STRV from last month to 12.385 million, up 0.4 percent from 2024/25. The increase in 2025/26 is based on both stronger domestic deliveries and direct consumption imports reported in the *SMD* during the first 7 months of the fiscal year than originally forecast (figures 3–6). This estimate is carried over to 2026/27.

Between October 2025–April 2026, beet sugar processors continue to gain ground, delivering above the 5-year monthly average since January. Cumulative beet sugar deliveries totaled 2.929 million STRV, about 175,000-STRV higher (6 percent) than the same period last year. Following a strong March, refiners' cane sugar deliveries in April are comparable with last year and the 5-year average; however, the cumulative pace (3.783 million STRV) remains 0.6

percent behind last year. Non-reporter deliveries (also known as direct consumption imports, or DCI[1]) rebounded in April and offset the negative DCI in March. Thus, DCI cumulative volume stands at 426,000 STRV, in line with last year's pace.

Given the preceding months' uptick in beet sugar deliveries, beet sugar inventories as of April 30 continue to trend closer to the 5-year average, while refined cane sugar inventories remain elevated. Raw cane sugar inventories held jointly by cane processors and cane refiners are also at record volume. Thus, total sugar stocks by the end of April (5.318 million STRV) remain at a record level but have at least come down closer to last year's (5.233 million STRV) at this same time.

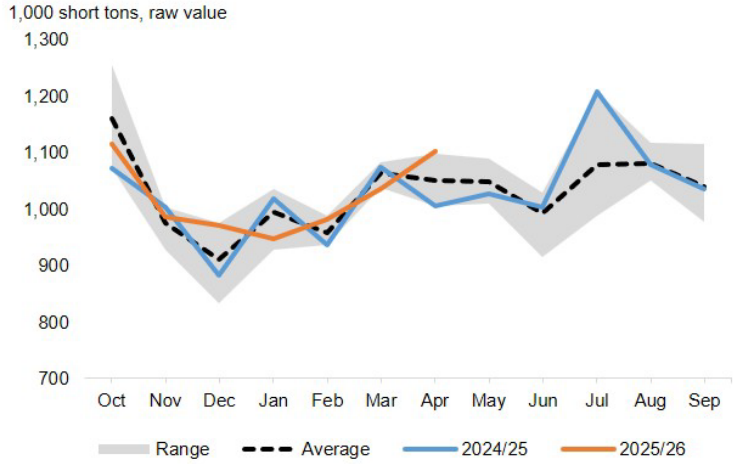
Refined sugar prices, both spot and forward prices for 2026/27, have developed a firm tone since mid-May due to several uncertainties. These uncertainties include a lower year-over-year outlook for domestic sugar production (particularly beet sugar), inflationary pressures on growers' input costs (e.g., fertilizer, fuel), and potential for increased duties on high-tier sugar imports.[2] The lower range of the Midwest refined beet sugar prices for 2026/27 reported in the May 27 Sosland's *Sweetener Report* increased 1 cent per pound from the prior week to 44 cents. Similarly, the Midwest refined beet sugar spot prices (lower range) increased to 45 cents per pound on June 10, up 3 cents per pound from the prior week. Meanwhile, between May 20 and 27, the Northeast refined cane sugar forward price's range widened from 49–50 cents per pound to 49–51 cents.

[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. Because of this derived calculation, DCI can be negative in some months. Historically, a negative month for DCI will be eventually offset in succeeding months.

[2] On April 15, 2026, American Sugar Alliance (ASA) filed a complaint with the U.S. Trade Representative (USTR) and formally requested the U.S. Government to use its Section 301 authorities to address the unreasonable and discriminatory acts, policies, and practices of sugar-producing countries that have harmed U.S. sugar producers, refiners, and workers. ASA is a national coalition of sugarbeet and sugarcane producers and also includes sugar processors, sugar refiners, sugar suppliers, and sugar workers.

Figure 3

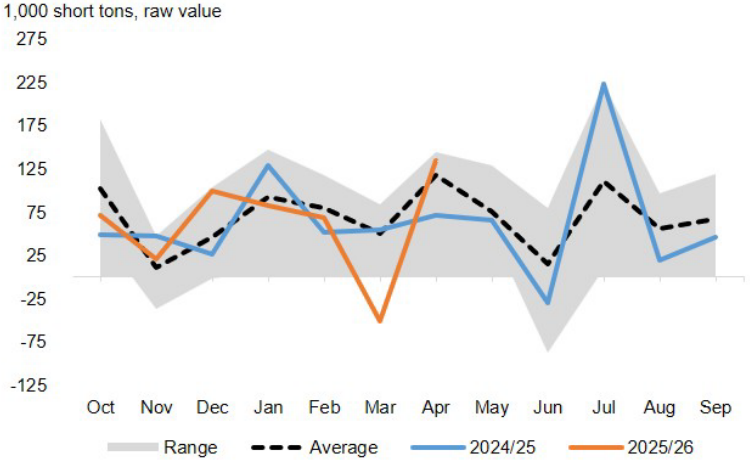
U.S. total sugar deliveries for food and beverage use, monthly, fiscal years 2020/21–2025/26



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

Figure 4

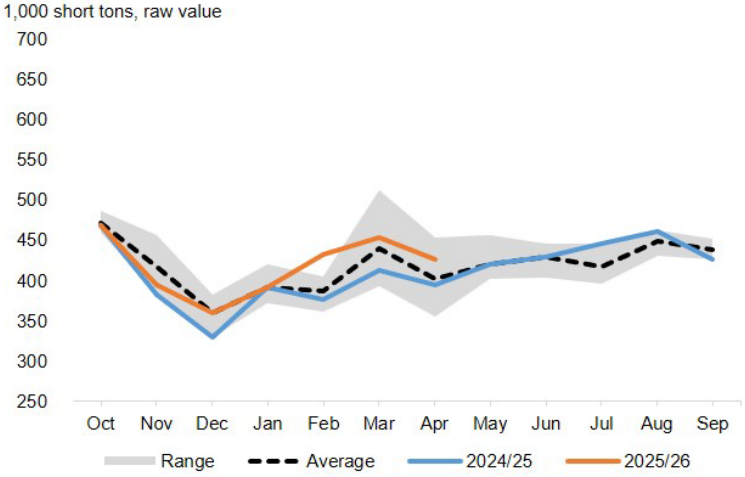
U.S. non-reporter sugar deliveries, monthly, fiscal years 2020/21–2025/26



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

Figure 5

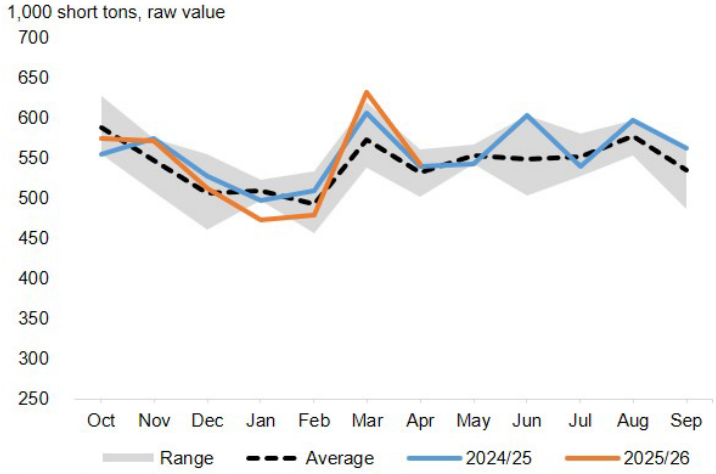
U.S. refined beet sugar deliveries, monthly, fiscal years 2020/21–2025/26



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

Figure 6

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



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

Mexico's Sugar Outlook

Mexico's Sugar Production Is Raised for 2025/26 and 2026/27

Mexico's 2026/27 sugar production is raised 141,000 metric tons, actual weight from last month to 5.283 million metric tons (MT), 1 percent higher than 2025/26, based on an updated forecast provided by USDA, Foreign Agricultural Service's Mexico City Post (table 4). Post raised its estimate of the area harvested (from 738,000 hectares to 748,000), sugarcane yield (from 65.36 MT per ha to 65.58 MT), and sugar recovery (from 10.66 percent to 10.77 percent). Post noted that seasonal rains during mid-2025 alleviated the drought conditions experienced during the prior 2 years and area is expected to increase. However, yields and sugar recovery can still be impacted as farmers may face constraints from increases in global fertilizer prices and other input costs since the start of the year.

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

	2024/25	2025/26			2026/27		
	final	May	June	Monthly change	May	June	Monthly change
Beginning stocks	1,418	1,123	1,123	0	1,068	1,176	108
Production	4,771	5,179	5,236	57	5,142	5,283	141
Imports	167	52	52	0	28	28	0
Imports for consumption	154	39	39	0	14	14	0
Imports for sugar-containing product exports (IMMEX)	13	13	13	0	14	14	0
Total supply	6,355	6,354	6,411	57	6,238	6,488	250
Disappearance							
Human consumption	3,901	4,001	4,001	0	3,929	3,929	0
For sugar-containing product exports (IMMEX)	323	296	296	0	297	297	0
Other deliveries and end-of-year statistical adjustment	-14	0	0	0	0	0	0
Total	4,209	4,297	4,297	0	4,226	4,226	0
Exports	1,023	989	938	-51	895	1,198	303
Exports to the United States and Puerto Rico	432	188	188	0	895	895	0
Exports to other countries 1/	591	801	750	-51	0	303	303
Total use	5,232	5,286	5,235	-51	5,121	5,425	303
Ending stocks	1,123	1,068	1,176	108	1,117	1,063	-53
Domestic	973	918	1,026	108	967	913	-53
United States 2/	150	150	150	0	150	150	0
Stocks-to-human consumption (percent)	28.8	26.7	29.4	2.7	28.4	27.1	-1.4
Stocks-to-use (percent)	21.5	20.2	22.5	2.3	21.8	19.6	-2.2
High-fructose corn syrup (HFCS) consumption (dry weight)	1,639	1,620	1,500	-120	1,600	1,462	-138

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).

For 2025/26, Mexico's sugar production is raised 57,000 MT from last month to 5.236 million. In its latest weekly production report (week 36 through June 6) that was released after the June USDA, *World Agricultural Supply and Demand Estimates'* (*WASDE*) report, Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) reported cumulative sugar production at 5.241 million MT. Adjustments will be made accordingly to the July *WASDE* report. As of week 36, 19 of the 47 mills are still in operation compared to 9 mills last year (table 5). Cumulative harvested area still lags last year's pace but has ramped up in the last 4 weeks (figure 7). In addition, relatively higher sugarcane field yield and extraction rates continue to hold. As such, this year's sugar production has a stronger-than-expected finish.

Minimal Changes to the Rest of Mexico's 2025/26 and 2026/27 Sugar Balance Sheet

The only other change to Mexico's 2025/26 sugar balance sheet from last month is a 108,000-MT increase in ending stocks, which is based on Post. Combining the upward adjustment in ending stocks with the 57,000-MT increase in sugar production, the estimate for Mexico's exports to destinations besides the United States (i.e., outside of suspension agreements) is residually calculated at 750,000 MT, which is 51,000-MT lower than last month.

The increase in Mexico's 2025/26 ending stocks translated to larger 2026/27 beginning stocks. Given a larger supply (more beginning stocks and production), Mexico's sugar exports in 2026/27 to non-U.S. destinations are increased to 303,000 MT; Mexico's sugar exports to the United States under the suspension agreements are unchanged at 895,000 MT.

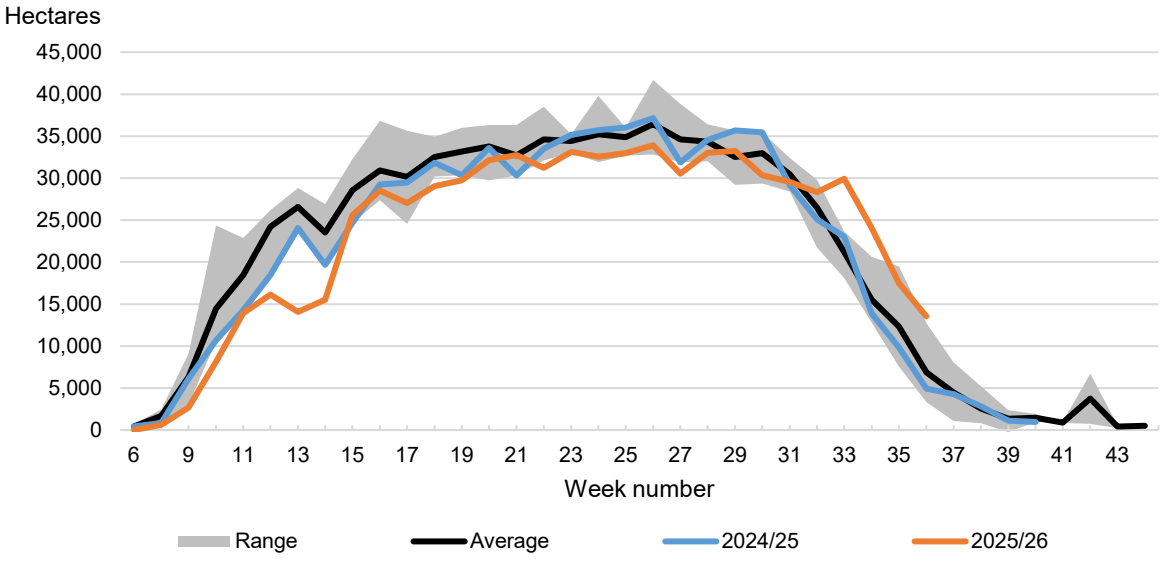
Mexico's 2026/27 domestic sugar consumption is unchanged from last month at 3.929 million MT, which reflects a 2-percent decrease from the previous year due to the expected impact of tax on sweetened beverages (i.e., Special Tax on Production and Services or IEPS). The other delivery component—deliveries to food and beverage manufacturing companies that participate in the Industria Manufacturera, Maquiladora y de Servicios de Exportación (IMMEX)—are also unchanged at 297,000 MT, about the same as 2025/26. Ending stocks for 2026/27 are forecast to continue including 150,000-MT of low-polarity sugar (less than 99.2 polarity) that are set aside and readily available for sugar 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 5: Mexico's cumulative sugar production through week 36 of the harvest season

	Pace to date		Over-the-year difference (2025/26 versus 2024/25)	
	2024/25	2025/26	Level	Percent
Number of mills in operation	9	19	10	111
Area harvested (1,000 ha)	728	711	-16	-2
Sugarcane processed (1,000 MT)	45,356	48,596	3,241	7
Sugarcane yield (MT per ha)	62.3	68.3	6.0	10
Extraction rate (percent)	10.5	10.8	0.3	3
Agro-industrial yield (MT sugar per ha)	6.5	7.4	0.9	13
Sugar production (1,000 metric tons)	4,746	5,241	495	10
By type:				
Refinada	934	1,043	109	12
Estándar	3,302	3,813	511	15
Blanco especial	61	58	-4	-6
Mascabado	0	20	20	NA
Polarity less than 99.2	449	308	-141	-31

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).

Figure 7
Mexico's weekly sugarcane harvested area, 2020/21–2025/26



Source: USDA, Economic Research Service calculations using data from Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Special Article: U.S. Honey Production Trends and Connections With the Market for Almond Pollination Services

Antoine Champetier[3], D. Adeline Yeh, Daniel A. Sumner[3], Vidalina Abadam, and Catharine Weber

For almost four decades (1987–2025), U.S. honey production has declined steadily, even as domestic prices and demand have risen. This trend has occurred while the California almond industry has transformed honey bee pollination into the single largest source of beekeeping revenue. This article documents these trends and examines the intertwined—and still incompletely understood—economics linking honey production and pollination services.

U.S. Honey Production Continues To Decline

In the last 40 years, the honey market in the United States has experienced increasing domestic consumption, growing imports, minimal exports, and slowly declining domestic production.[4] U.S. honey utilization had an average growth of around 11 million pounds per year between 1987 and 2025. Concurrent with this rise in domestic consumption, real[5] (inflation-adjusted) U.S. producer prices for honey have risen almost three-fold, growing 3 percent annually from 1987–2025 and averaged about $3 per pound from 2021–2025 (figure 8).

In contrast to the upward trends in quantity demanded and price, domestic honey production has exhibited a gradual decline, falling by roughly half since 1987. Based on USDA, National Agricultural Statistics Service (NASS) *Honey* reports, honey produced by U.S. beekeepers fell from 212 million pounds in 1987–91 to 128 million pounds in 2020–2024, representing an average drop of 3.1 million pounds per year. In 2025, honey production fell even further, by 18.7 million pounds to 116 million pounds, given the year-over-year decline in both the number of honey-producing colonies and honey yield per colony.

Honey-producing colonies decreased from 3.3 million in 1987 to a historic low of 2.3 million in 2008 but recovered, ranging between 2.49 million and 2.83 million colonies annually between 2009–24. However, in 2025, the number of colonies declined to 2.4 million (figure 9). Honey yield has been on a declining trend since reaching a record high of 84 pounds per colony in 1998, reaching a record low of 47 pounds in 2021 and 2022. While the yield recovered to about 53 pounds in 2023 and 2024, the yield fell to 48 pounds per colony in 2025.

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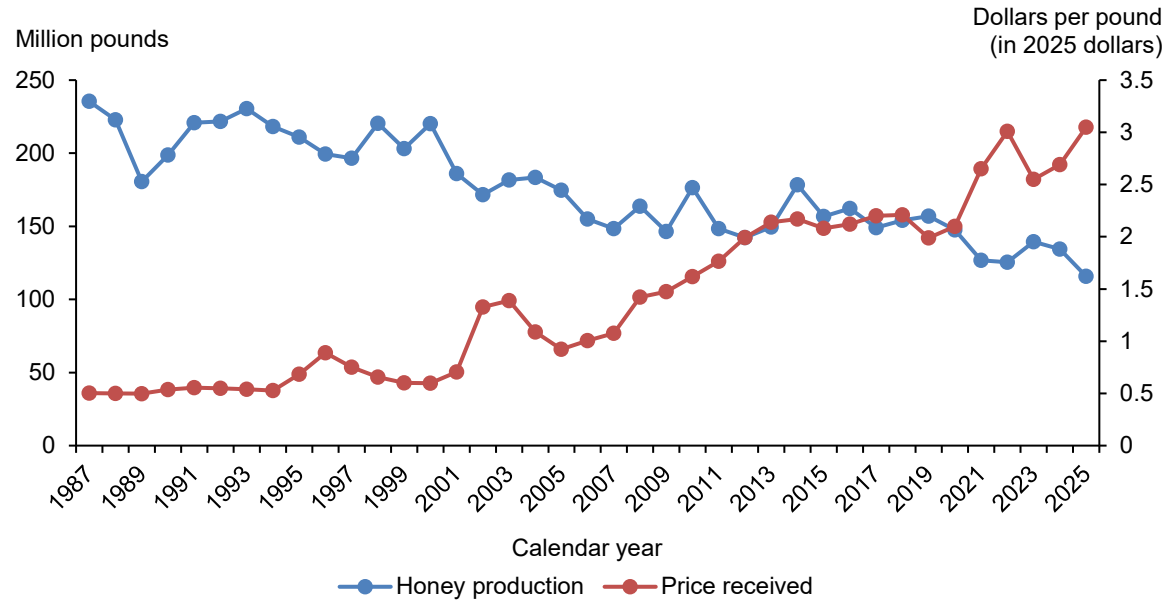
[4] For the related data and additional context on consumption, production, and import statistics, see the USDA, ERS visualization titled *Meeting Honey Demand in the United States*, a Sugar and Sweeteners Yearbook Tables data product.

[5] Prices received by U.S. producers come from USDA, National Agricultural Statistics Service *Honey* report. Prices were adjusted for inflation in terms of 2025 dollars using the U.S. Department of Commerce, Bureau of Labor Statistics Consumer Price Index for Urban Consumers (series CPIAUCSL).

Figure 8

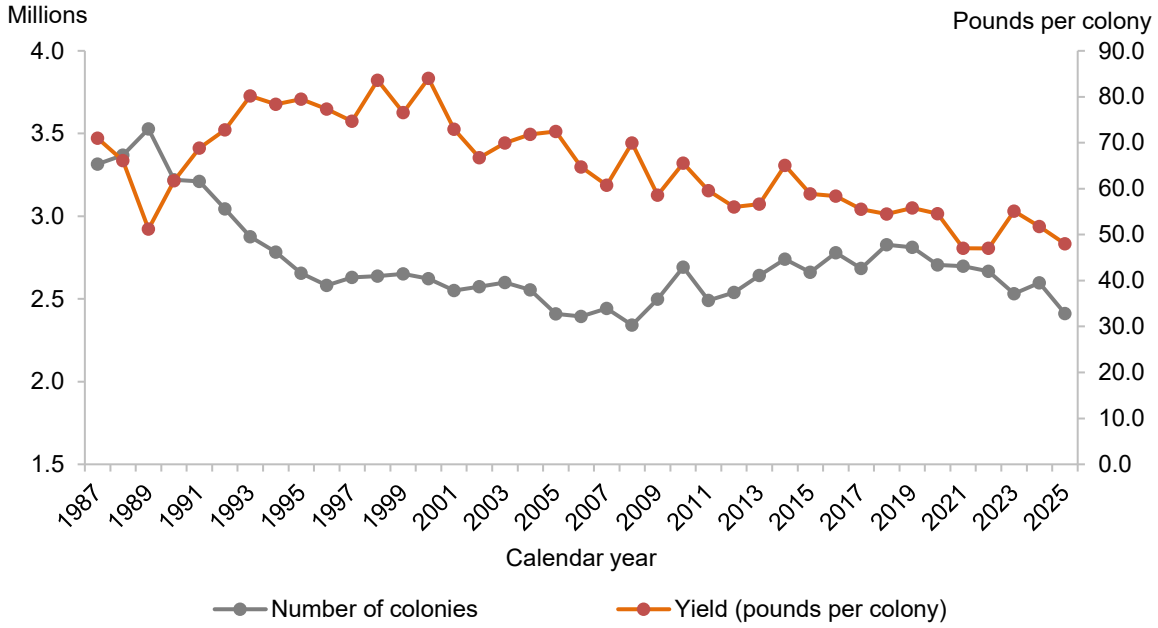
U.S. honey production and inflation-adjusted price of honey received by producers



Source: USDA, Economic Research Service calculations using data from the USDA, National Agricultural Statistics Service *Honey* reports, and from the U.S. Department of Commerce, Bureau of Labor Statistics for Consumer Price Index for urban consumers (CPIAUCSL) to adjust for inflation.

Figure 9

U.S. number of honey-producing colonies and honey produced per colony (yield)



Source: USDA, Economic Research Service and co-authors' calculations using data from the USDA, National Agricultural Statistics Service *Honey* reports.

Pollination Services Have Overtaken Honey Production as a Major Source of Revenue

Over the past half-century, demand for pollination services from the California almond industry has gradually become a central driver of U.S. beekeeping economics. California is the only U.S. State that produces almonds commercially, according to NASS, *Crop Production* reports. Based on the USDA, Foreign Agricultural Service (FAS) *Production, Supply, and Distribution* database, the United States produced 3 billion pounds of almonds in marketing year 2025/26, more than three times the average volume in the early 2000s.[6] An increase in California almond production and bearing acreage in the past two decades coincided with the nominal pollination fees per colony nearly quadrupling in 2004–06, and higher premiums for stronger colony rentals (with more bees, which are measured in frames).

In 2016 and 2017, honey production had been the largest source of U.S. beekeeping revenue. Honey production contributed an average share of 51 percent of total beekeeping revenue, while revenue from almond pollination service averaged 31 percent, followed by non-almond pollination (8 percent) and other apiary products (10 percent) (table 6). But starting in 2022, the revenue from all U.S. pollination services (almond and non-almond) has exceeded that of honey revenue (Abadam & Yeh, 2025). As discussed in the earlier sections, the decreasing trend in honey revenue can be partly attributed to the decline in quantity of honey produced, more than offsetting the increase in the real price of honey received by U.S. producers.

Table 6: Beekeeping revenues by source (in 2025 U.S. dollars)

Revenues (2025 dollars)	**2016**	**2017**	***Average share, 2016–2017***	**2022**	**2023**	**2024**	**2025**	***Average share, 2022–2025***
	(Dollars, millions)	(Dollars, millions)	(Percent)	(Dollars, millions)	(Dollars, millions)	(Dollars, millions)	(Dollars, millions)	(Percent)
Honey	602	550	51	443	386	370	353	44
Pollination fees	454	419	39	484	437	408	408	49
Almonds	355	332	31	400	353	334	341	41
All other crops	99	87	8	83	84	74	67	9
Other apiary products	112	106	10	61	61	53	48	6
Total	**1,168**	**1,075**	***100***	**988**	**884**	**831**	**809**	***100***

Note: Other apiary products include queens, queen cells, beeswax, and propolis. The revenues were adjusted for inflation in terms of 2025 dollars, using the Consumer Price Index for all urban consumers (CPIAUCSL).

Source: USDA, Economic Research Service calculations using data from the USDA, NASS *Honey* reports and NASS *Cost of Pollination* reports, and from the U.S. Department of Commerce, Bureau of Labor Statistics for Consumer Price Index for urban consumers (CPIAUCSL) to adjust for inflation. NASS *Cost of Pollination* reports were not published between 2018 and 2021.

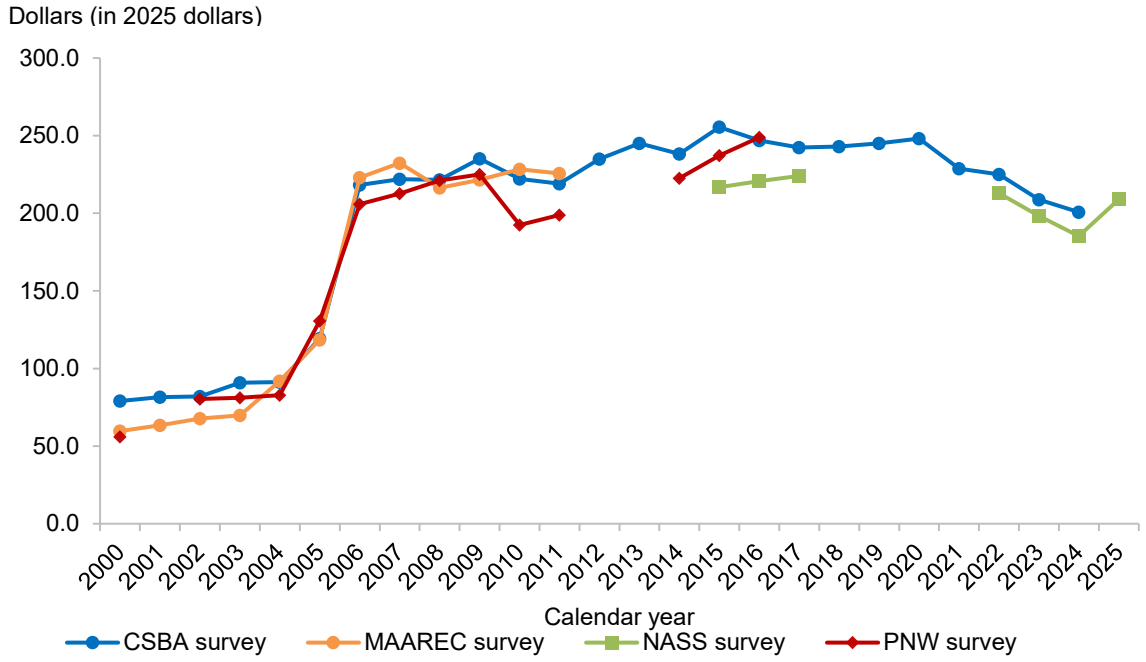
[6] The world's almond production is based on different countries' marketing years. Based on USDA, Foreign Agricultural Service (FAS) *Production, Supply, and Distribution* (PSD) database, the marketing year begins in August of the first year of the split year for the United States and other Northern Hemisphere countries. Southern Hemisphere countries are on a calendar year basis, indicated as the second year of the split year. Besides the United States, the *PSD* shows almond production for Australia, Chile, China, European Union, India, and Turkey.

Pollination Service Revenues Have Been Declining After 2022, Partly Due to Lower Fees

After the spike in 2004–06 that saw pollination fees more than doubling from $91 per colony to $218,[7] the national average almond pollination fees in real terms (2025 dollars) have been mostly stable and hovered from $218 to $255 per colony between 2006–20.[8] The fees have recently declined, falling to $201 per colony in 2024 (figure 10). In 2025, almond fees increased to $209 per colony, based on the NASS *Cost of Pollination* survey,[9] but remain below the peak from prior years. Despite overtaking honey production after 2022, revenues from all pollination services (almond and non-almond) have also fallen, contributing to the overall downtrend in total beekeeping revenues (table 6). One contributing factor is the declining trend in pollination fees in the past 5 years.

Figure 10

Fees per honey bee colony for almond pollination



Source: USDA, Economic Research Service calculations using various years' data from four surveys namely, California State Beekeepers Association (CSBA) *Almond Pollination Fee Survey*; Mid-Atlantic Apiculture Research and Extension Consortium (MAAREC) *Pollination Survey*; Oregon State University Extension Service Pacific Northwest (PNW) *Pollination Survey*, and USDA, National Agricultural Statistics Service (NASS), *Cost of Pollination Survey,* and from the U.S. Department of Commerce, Bureau of Labor Statistics for Consumer Price Index for urban consumers (CPIAUCSL) to adjust for inflation.

[7] Data on fees per colony for almond pollination are available from the following four surveys:
- California State Beekeepers Association (CSBA), *Almond Pollination Fee Survey*;
- Mid-Atlantic Apiculture Research and Extension Consortium (MAAREC) *Pollination Survey*;
- Oregon State University Extension Service, Pacific Northwest (PNW) *Pollination Survey*; and
- USDA, NASS, *Cost of Pollination Survey*

[8] The pollination fees for 2006–20 are based on the California State Beekeepers Association (CSBA) *Almond Pollination Fee Survey*.

[9] The USDA, NASS *Cost of Pollination Survey* shows averages over all colonies rented.

Almond Pollination Demand Is Projected To Decline in the Coming Years

Another contributing factor to the declining pollination revenue is the reduction in acreage with paid pollination, particularly that of almond orchards. The bearing acreage of almonds (i.e., the acres of almond orchards that are mature enough to produce almonds in a given year, typically plantings 4 years and older) provides a reliable indication of the number of honey bees used in almond pollination. This is because almond yields depend crucially on availability of managed honey bees for pollination.

Figure 11 presents the total bearing-almond acreage (dark green line) from 1995–2026. Acreage is based on the NASS *California Almond Acreage Report*, as well as the self-fertile bearing acres (light green line) as a subset of total bearing acreage, based on the Almond Board of California's *Land IQ* reports. After decades of steady expansion, total bearing-almond acreage in California seems to plateau between 2022–26 near 1.4 million acres. Conversely, self-fertile bearing acres (primarily Independence and Shasta varieties), which can produce nuts without cross-pollination by bees, have gradually increased in the past 10 years (though still limited). Independence (released in 2008) and Shasta (released in 2015) were the first self-pollinating almond varieties adopted at scale in California and remain the dominant self-fertile almond varieties. Earlier self-pollinating varieties were planted in other countries, but other agronomic tradeoffs limited their commercial appeal. Although self-fertile varieties do not necessarily need bee colonies, studies indicate that the varieties may still benefit from supplemental bee pollination for improved yield and quality.

Figure 11 also includes estimates of almond acreage with paid pollination (red circles; second column in table 7) from the NASS *Cost of Pollination* reports (available in two time periods, 2015–17 and 2022–25). In the first period (2015–17), the acreage with paid pollination was only slightly below the total almond bearing acreage reported in the NASS *Almond Pollination Report.* In the second period (2022–25), however, estimates of almond acreage with paid pollination relatively diverged from the total bearing-almond acreage. This trend may reflect an increasing, though still limited, use of self-fertile varieties, amid recent bee colony losses and higher pollination service costs.

Unlike almond acreage data, there are no comprehensive data on the total number of honey bee colonies used in almond pollination. That total is typically inferred from stocking density—the number of colonies placed per acre. The USDA, Risk Management Agency (2023) requires a minimum stocking density for almond orchards; failure to meet this threshold renders a grower ineligible for insured loss claims.[10] The NASS, *Cost of Pollination* report does have limited data on the number "colonies used" (third column in table 7), which reflects the colonies used to pollinate a crop regardless of colony ownership or if colonies used were on a paid basis. In both periods of the NASS, *Cost of Pollination* report (2015–17 and 2022–25), "colonies used" reveal a declining trend.

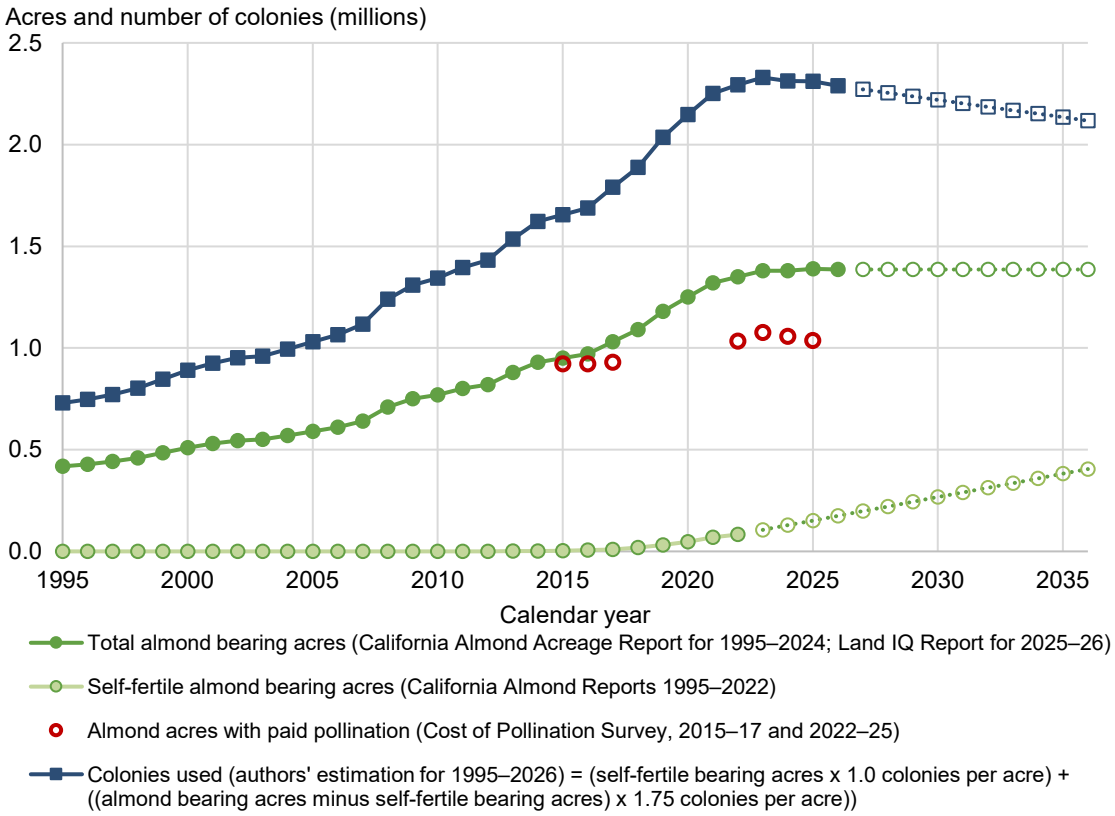
The following calculation was conducted to provide a trend on total colonies used for almond pollination. An estimate of the colony density per acre ("implied") (table 7, column 4) was obtained for each year data were available from the NASS Cost of Pollination report by dividing "colonies used" (column 3) by "acres with paid pollination" (column 2). Then, the estimates for colony density were refined by authors (column 5) by adjusting for the known bearing acreage of self-fertile

[10] The current standard of two colonies per bearing acre of almonds is referenced in the requirements for insurability in USDA Risk Management Agency (2023), which states *"a minimum of two six-frame colonies per acre or its equivalent (for example 1.5 eight frame colonies)".*

almonds, which grew over the past 10 years. The resulting 7-year average for the colony density for traditional varieties, after adjusted for self-fertile acreage, was 1.75 colonies per acre.

Figure 11

U.S. almond acreage and honey bee colonies for pollination services



Note: Markers without color fill represent projections by the authors for total almond bearing acres (2027–36), self-fertile almond bearing acres (2023–36), and colonies used for pollination (2027–36) and are not official USDA estimates. Self-fertile almond bearing acres are a subset of total almond bearing acres and only include the Independence and Shasta varieties.

Source: USDA, Economic Research Service calculations using data from:
(1) USDA, National Agricultural Statistics Service (NASS) *California Almond Acreage Report* for total almond bearing acres in 1995–2023 and Almond Board of California Land IQ Acreage Reports in 2025–26;
(2) USDA, NASS *California Almond Acreage Report* for self-fertile almond bearing acres in 1995–2022;
(3) USDA, NASS *Cost of Pollination Survey* for almond acres with paid pollination and number of colonies used in 2015–17 and 2022–25.

Table 7: Estimates of almond-bearing acres with paid pollination and the number of colonies used

Year	Acres with paid pollination	Colonies used	Implied colony density	Colony density adjusted for self-fertile acres
	(millions)	*(millions)*	*(colonies/acre)*	*(colonies/acre)*
2015	0.92	1.76	1.91	1.91
2016	0.92	1.59	1.73	1.73
2017	0.93	1.48	1.59	1.60
2022	1.03	1.88	1.82	1.83
2023	1.08	1.78	1.66	1.73
2024	1.06	1.80	1.71	1.80
2025	1.04	1.63	1.57	1.67
Average	1.00	1.70	1.71	1.75

Note: Self-fertile bearing acres are calculated with only Independence and Shasta varieties. The calculation assumes one colony used in self-fertile acreage, as some existing studies indicate that self-fertile varieties still benefit from supplemental pollination in terms of both yield and quality.
Source: USDA, Economic Research Service using data from USDA, NASS *Cost of Pollination Survey*.

Applying this 1.75-colonies-per-acre estimate for traditional varieties and a 1-colony-per-acre assumption for self-fertile varieties, the number of colonies used in almond pollination each year between 1995–2026 (figure 10, dark blue line) can be approximated using the almond-bearing acres from the NASS, *California Almond Acreage Report*, and the Land IQ, *Acreage Report*. This approach indicates that the number of colonies used in almond pollination peaked in 2023 at 2.33 million colonies and began slowly decreasing, reaching 2.29 million in 2026 (figure 10).

In addition, projections of colonies to be used in almonds for the next decade (2027–36) are also calculated using this approach, holding total-bearing acreage constant at the 2025 level (about 1.38 million acres) and assuming that the replacement rate of bearing acreage between self-fertile varieties and traditional almond varieties occurs at 23,000 acres per year (which was the maximum annual increase in the bearing acreage for self-fertile varieties recorded in 2021). Under these assumptions,[11] the number of bee colonies used for almond pollination is projected to gradually decline in the next 10 years. The projected decline may be an overestimate, as the analysis assumes only one colony use in self-fertile acreage and the maximum annual replacement rate to self-fertile varieties.

Summary

This article has documented the four-decade decline in U.S. honey production despite sustained growth in domestic honey demand and rising real honey prices. Lower honey production has coincided with increased demand for pollination services—driven by California almonds. Almond pollination has emerged as the principal source of U.S. beekeeping revenue, surpassing honey production beginning in 2022. However, recent decreases in pollination fees, together with the reduced bee colony stocking density and stagnant growth in almond bearing acres, have moderated revenue growth for pollination services. If these trends continued, future demand for honey bee colonies used in almond pollination would decline from 2023–25 levels. These findings highlight the interconnected biological and economic forces shaping both honey markets and pollination services in the United States.

[11] These assumptions reflect the typical productive lifespan of almond orchards, which is approximately 25–30 years before replanting becomes both necessary and economically justified, given that newly planted trees require 3–4 years to reach productive maturity.

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