



Sugar and Sweeteners Outlook: October 2026

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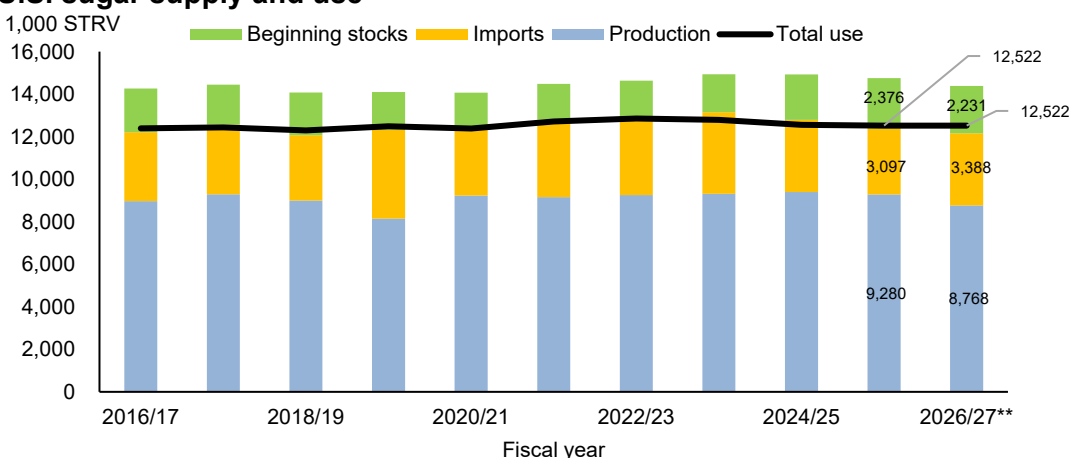
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U.S. 2026/27 Sugar Supply Is Raised; Use is Reduced

U.S. sugar supply for fiscal year 2026/27 (October 2026–September 2027) is raised from last month by 119,000 short tons, raw value (STRV) to 14.387 million on larger beginning stocks (due to adjustments in the 2025/26 balance sheet) more than offsetting the reductions in sugar production and imports. Sugar production is down 71,000 STRV to 8.768 million STRV, the lowest since 2019/20's 8.149 million. Sugar imports are lowered 8,000 STRV to 3.388 million but almost 10 percent higher than the revised 2025/26 estimate. In line with the change for 2025/26, sugar deliveries for domestic food and beverage use are reduced 50,000 STRV to 12.392 million. With no change to the remaining use categories (exports and other deliveries), total sugar use is down 50,000 STRV to 12.522 million. Ending stocks are up 168,000 STRV to 1.865 million and the stocks-to-use ratio is 14.9 percent, 1.4 percentage points higher.

Figure 1

U.S. sugar supply and use



Note: (**) denotes forecast, STRV = short tons, raw value.

Source: USDA, Economic Research Service using data from USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*.

U.S. Sugar Outlook

U.S. Beet Sugar Production Is Lowered for 2025/26 and 2026/27

U.S. fiscal year 2025/26 (October 2025–September 2026) beet sugar production is reduced from last month by 38,000 STRV to 5.038 million (table 1), about 330,000-STRV lower than 2024/25, as the increase in crop year sugar output is more than offset by a reduction in early season sugar output. The 2025 crop year beet sugar production (August 2025–July 2026) is raised 21,000 STRV to 5.148 million on final adjustments to sugarbeet shrink and sucrose recovery (table 2). The current crop year's (2026) early season production (August–September 2026), which is accounted for in fiscal year 2025/26, is reduced 58,000 STRV to 596,000 STRV based on the beet processors' estimate published in the USDA, Farm Service Agency's *Sweetener Market Data (SMD)*.

Amid the ongoing drought conditions, growers in some areas delayed harvest as they held out for rain and gave additional time for sugarbeets to grow and store sugar. According to USDA's October 6 U.S. *Agriculture in Drought* report, about 48 percent of sugarbeet production is within an area experiencing drought, down from the previous week's 60 percent but higher than last year's 34 percent. As of the USDA, National Agricultural Statistics Service (NASS) October 13 Crop Progress report, overall sugar beet harvest for the 4 major producing U.S. States is 32 percent complete, behind the 5-year average (36 percent).¹ Except for North Dakota, the current pace of harvest is lagging the 5-year average for Idaho, Michigan, and Minnesota (table 3).

For fiscal year 2026/27, U.S. beet sugar production is reduced from last month by 27,000 STRV to 4.742 million, the lowest level since 2019/20 and reflecting 2 consecutive years of decline. This reduction is mainly based on a lower national sugarbeet yield (from last month's 31.5 tons per acre to 30.8 tons, the lowest in 4 years) reported in the USDA, NASS October *Crop Production* report. The largest yield decreases were for major producers Minnesota and North Dakota, each down 1.2 tons per acre from last month—as well as for Colorado, Idaho, and Wyoming. These States' reductions more than offset the increases for Michigan, Montana, Nebraska, and Oregon. Yield is unchanged for Washington State.

¹ Year-over-year harvest progress comparisons are not available due to last year's Government shutdown.

Meanwhile, the national sugarbeet area harvested is unchanged at 1.009 million acres, the third lowest level in 47 years. A combination of several factors likely contributed to the acreage reduction, including a relatively high level of carry-in sugar among sugarbeet processors, high input costs, and a challenging planting season (due to a combination of weather events). The estimate for early sugar production next year (August–September 2027) is also unchanged at 654,000 STRV, which is based on a 5-year average (2020/21–2024/25).

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	September	October	Monthly change	September	October	Monthly change
Beginning stocks	2,141	2,376	2,376	0	2,033	2,231	199
Total production	9,397	9,265	9,280	15	8,839	8,768	-71
Beet sugar	5,370	5,076	5,038	-38	4,769	4,742	-27
Cane sugar	4,027	4,189	4,242	53	4,071	4,026	-44
Florida	1,932	1,957	1,957	0	1,819	1,819	0
Louisiana	2,095	2,232	2,285	53	2,252	2,208	-44
Texas 1/	0	0	0	0	0	0	0
Total imports	3,393	2,964	3,097	134	3,396	3,388	-8
Tariff-rate quota imports	1,534	1,313	1,299	-14	1,391	1,391	0
Raw TRQ	1,003	1,056	1,045	-12	1,137	1,136	-2
Refined TRQ	252	21	21	0	21	21	0
FTA TRQ	280	236	234	-2	233	235	2
Other program imports: for re-export and polyhydric	373	340	399	59	300	300	0
Non-program imports	1,485	1,310	1,399	89	1,705	1,696	-8
Mexico	504	242	247	6	1,188	1,188	0
High-tier tariff/other	980	1,068	1,152	83	517	508	-8
High-tier tariff	928	1,031	1,114	83	517	508	-8
Raw sugar	547	514	606	92	0	0	0
Refined sugar	382	215	214	-1	215	214	-1
Refined sugar (specialty) 2/	NA	301	294	-7	301	294	-7
Other 3/	52	37	37	0	0	0	0
Total supply	14,931	14,604	14,753	149	14,268	14,387	119
Total exports	111	25	25	0	25	25	0
Miscellaneous: end-of-year statistical adjustment	-41	0	0	0	0	0	0
Total deliveries	12,485	12,546	12,497	-50	12,546	12,497	-50
Domestic food and beverage	12,375	12,441	12,392	-50	12,441	12,392	-50
Other deliveries:	111	105	105	0	105	105	0
Sugar-containing products re-export program	82	80	80	0	80	80	0
Polyhydric alcohol, ethanol, other alcohol	14	15	15	0	15	15	0
Livestock feed	15	10	10	0	10	10	0
Commodity Credit Corporation (CCC): ethanol, feed	0	0	0	0	0	0	0
Total use	12,555	12,571	12,522	-50	12,571	12,522	-50
Ending stocks	2,376	2,033	2,231	199	1,697	1,865	168
Stocks-to-use ratio (percent)	18.9	16.2	17.8	1.8	13.5	14.9	1.4

Note: Totals and monthly changes may not add due to rounding. NA = not applicable; TRQ=Tariff-rate quota.

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 "Refined sugar" subcategory under "High-tier tariff". 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 September	2025/26 October	Monthly change	2026/27 September	2026/27 October	Monthly change
<i>Units are in 1,000 STRV unless specified</i>							
Area planted (1,000 acres)	1,105	1,079	1,079	0	1,026	1,026	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	1,009	1,009	0
Yield (tons per acre)	32.50	33.16	33.16	0.00	31.47	30.85	-0.62
Sugarbeet production (1,000 tons)	35,316	35,140	35,140	0	31,763	31,136	-627
Sugarbeet shrink (percent)	7.90	8.27	8.59	0.32	7.66	7.66	0.00
Sugarbeet sliced (1,000 tons)	32,527	32,233	32,122	-111	29,331	28,752	-579
Sugar extraction rate from slice (percent)	15.46	14.63	14.74	0.12	14.79	14.79	0.00
Sugar from beets sliced	5,030	4,715	4,736	21	4,339	4,253	-86
Sugar from molasses	324	413	413	0	400	400	0
Crop year sugar production	5,354	5,127	5,148	21	4,739	4,653	-86
Sugar from imported beets	NA	NA	NA	NA	30	30	0
Aug.–Sep. sugar production	690	706	706	0	654	596	-58
Aug.–Sep. sugar production: next crop	706	654	596	-58	654	654	0
Fiscal year sugar production	5,370	5,076	5,038	-38	4,769	4,742	-27

STRV = short tons, raw value; NA = 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 are based on data from USDA, National Agricultural Statistics Service (NASS).

3. Sugarbeet shrink and sugar extraction rate from slice for 2025/26 are based on beet processors' estimates submitted to the USDA, Farm Service Agency, *Sweetener Market Data* report. For 2026/27, shrink is based on processors' 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 beet processors' estimates in the *SMD*.

5. Early sugar production for August–September 2026 is based on beet processors' estimates in the *SMD* while August–September 2027 is based on a 5-year average (2020/21–2024/25).

6. Sugar from imported beets for 2024/25 and 2025/26 is already included in the final crop year production. For 2026/27, this variable is based on a 5-year average (2020/21–2024/25). 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 *Sweetener Market Data* (*SMD*) report; and the USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* report.

Table 3: U.S. sugarbeets harvested for selected U.S. States (percent)

State	2025/26	2026/27		5-year average
	Week ending October 11, 2025	Week ending October 4, 2026	Week ending October 11, 2026	(2021–25)
Idaho	NA	15	23	34
Michigan	NA	11	16	30
Minnesota	NA	17	35	37
North Dakota	NA	33	45	37
4 States	NA	19	32	36

NA = not available.

Note: These 4 States harvested 87 percent of the 2025 U.S. sugarbeet acreage.

Due to a lapse in Federal funding in October and November 2025, the Crop Progress reports for the weeks ending October 5, 2025–November 9, 2025 were canceled. Therefore, previous-year estimates for the corresponding weeks are not available. The 5-year average reflects the years 2021–2025, using published estimates for 2021–2024 and imputed estimates for 2025.

Source: USDA, National Agricultural Statistics Service *Crop Progress* reports.

U.S. Cane Sugar Production Is Raised for 2025/26 and Lowered for 2026/27, Solely Based on Louisiana's Production

Fiscal year 2025/26 U.S. cane sugar production is raised from last month by 53,000 STRV to a new record 4.242 million STRV (table 4), based on Louisiana's stronger-than-expected harvest campaign, which started around mid-September. Louisiana's early sugar production in September (which is accounted for in fiscal year 2025/26) is raised 53,000 STRV to 120,000 STRV, based on the processors' estimates published in the *SMD* report and proprietary industry reports. This 53,000-STRV adjustment raised Louisiana's fiscal year 2025/26 cane sugar production to a new record 2.285 million STRV, up 9 percent from 2024/25.

Table 4: 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	395
Sugarcane yield (tons per acre)	42.4	44.5	44.4	45.1	41.9	39.7
Sugarcane production for sugar (1,000 tons)	16,451	17,177	17,360	17,183	16,718	15,689
Recovery rate (percent)	11.8	11.6	12.0	11.2	11.7	11.6
Sugar production (1,000 STRV)	1,934	1,985	2,079	1,932	1,957	1,819
Louisiana						
Area harvested for sugar (1,000 acres)	466	474	481	498	504	515
Sugarcane yield (tons per acre)	29.0	32.1	29.9	31.1	31.7	32.0
Sugarcane production for sugar (1,000 tons)	13,514	15,215	14,382	15,488	15,977	16,472
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	2,261
Sep. sugar production (1,000 STRV)	12	75	6	124	114	120
Sep. sugar production of the next crop (1,000 STRV)	75	6	124	114	120	67
Fiscal year sugar production (1,000 STRV) 1/	1,944	2,001	2,022	2,095	2,285	2,208
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	910
Sugarcane yield (tons per acre)	34.9	37.1	36.1	37.2	36.2	35.3
Sugarcane production for sugar (1,000 tons)	31,021	33,090	32,113	32,671	32,695	32,162
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	4,236	4,079
Fiscal year sugar production (1,000 STRV)	4,002	4,063	4,141	4,027	4,242	4,026

(*) denotes estimate; (**) denotes forecast; STRV = short tons, raw value.

1/ Louisiana fiscal year sugar production = total crop year sugar - sugar produced in September + sugar produced in September 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 (NASS); USDA, Farm Service Agency (FSA) *Sweetener Market Data* report; and the USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* report.

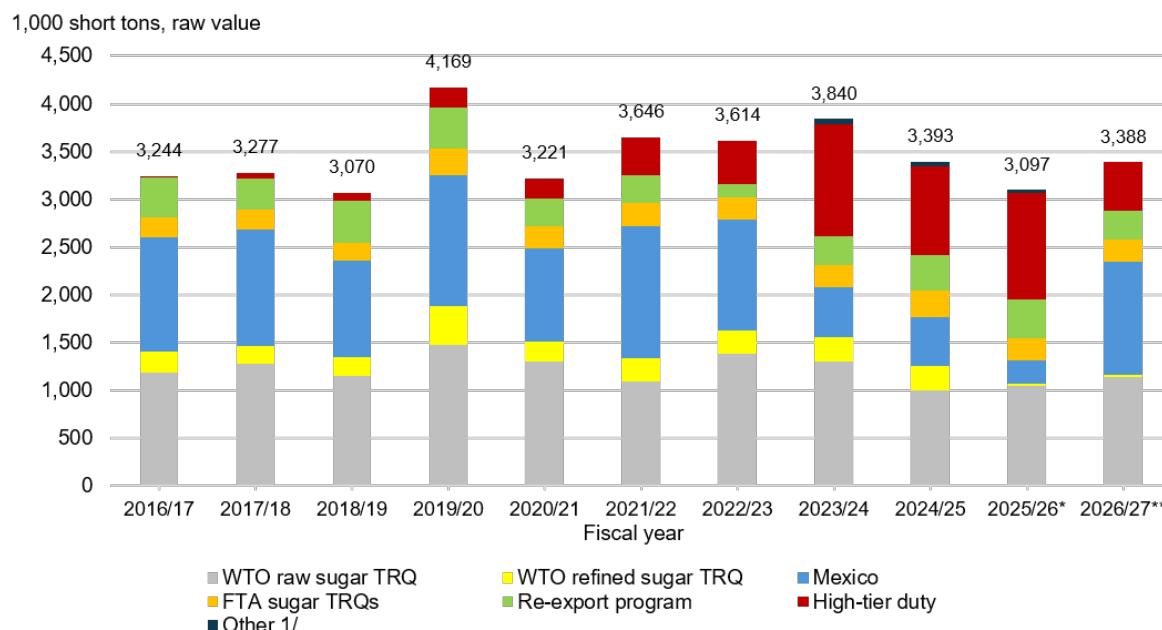
For 2026/27, U.S. cane sugar output is reduced from last month by 44,000 STRV to 4.026 million STRV, also solely because of a reduction for Louisiana's output (now projected at 2.208 million STRV but remains the second largest behind the State's 2025/26 output). As discussed above, a higher estimate for Louisiana's September 2026 production will be accounted for in fiscal year

2025/26, while the forecast for the State's September 2027 production is unchanged at 67,000 STRV. The boost to Louisiana's September 2026 production and subsequent decrease to the 2026/27 fiscal year sugar production forecast was partially offset by an increase in the sugarcane area for sugar production (compared with sugarcane area for seed purposes) that the processors submitted in the *SMD* report.

U.S. Sugar Imports for 2025/26 Are Raised

Several adjustments were made to the 2025/26 U.S. import sugar categories based on newly available preliminary data from the U.S. Department of Commerce, Bureau of the Census and USDA, Foreign Agricultural Service (FAS) database (please see the USDA, Foreign Agricultural Service *Fiscal Year 2026 - Preliminary Final Report* that was released on October 9). The largest changes from last month are the upward revisions to raw sugar imports under the re-export import programs and to high-tier duty raw sugar imports, both of which more than offset the reductions to the other import categories. The net result is a 134,000-STRV increase in total U.S. sugar imports to 3.097 million STRV (figure 2).

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.

Based on the FAS' *Fiscal Year 2026 - Preliminary Final Report*, re-export program imports are up 59,000 STRV to almost 400,000 STRV, the second largest since 2019/20. High-tier raw sugar imports are raised 92,000 STRV to 606,000 STRV, the second largest behind 2023/24. Imports of refined sugar and specialty refined sugar paying the high-tier duty are reduced slightly (1,000 STRV and 7,000 STRV, respectively). As a result, total high-tier sugar imports are now estimated at 1.114 million STRV, the second largest behind 2023/24.

Meanwhile, U.S. imports of raw sugar under the World Trade Organization (WTO) TRQ are lowered 12,000 STRV to 1.045 million STRV on an additional shortfall² from several supplying countries (particularly Malawi, Colombia, South Africa, Peru, Mauritius, and Panama). The total shortfall is now estimated at 187,000 STRV, the second largest in the last decade (behind last year's 229,000 STRV).

² The WTO raw sugar TRQ shortfall is the difference between the quota allocation and actual entry of sugar imports into the United States.

Free trade agreements (FTA) TRQ imports, which are on a calendar-year basis (as opposed to fiscal-year basis), are lowered by 2,000 STRV to 234,000 STRV, as additional shipments are now expected to arrive in October–December 2026, and thus will be accounted for in fiscal year 2026/27 instead of 2025/26. Lastly, U.S. sugar imports from Mexico are increased 6,000 STRV to 247,000 STRV, which are seemingly above the final 2025/26 U.S. Needs set in March (219,638 STRV).³

U.S. Sugar Imports for 2026/27 Are Slightly Lowered

For 2026/27, U.S. sugar imports are lowered from last month by 8,000 STRV to 3.388 million STRV, though they remain nearly 300,000 STRV above 2025/26. This reduction reflects decreases for the projected high-tier duty refined sugar imports (down 1,000 STRV) and high-tier duty specialty refined sugar imports (down 7,000 STRV), both of which are consistent with adjustments made for 2025/26. FTA TRQ imports are increased by 2,000 STRV to 235,000 STRV due to post-September 30 entries (as discussed in the earlier section) and largely offset a 2,000-STRV decrease in WTO raw sugar TRQ imports, which are now projected at 1.136 million STRV. This reduction for WTO raw sugar TRQ imports incorporates the updated shortfall estimate of 96,000 STRV, following the September 23 announcement by the Office of the U.S. Trade Representative allocating Brazil's remaining quota (55,993 metric tons, raw value or about 62,000 STRV) to 28 countries.⁴

U.S. 2025/26 and 2026/27 Sugar Deliveries for Human Consumption Are Lowered

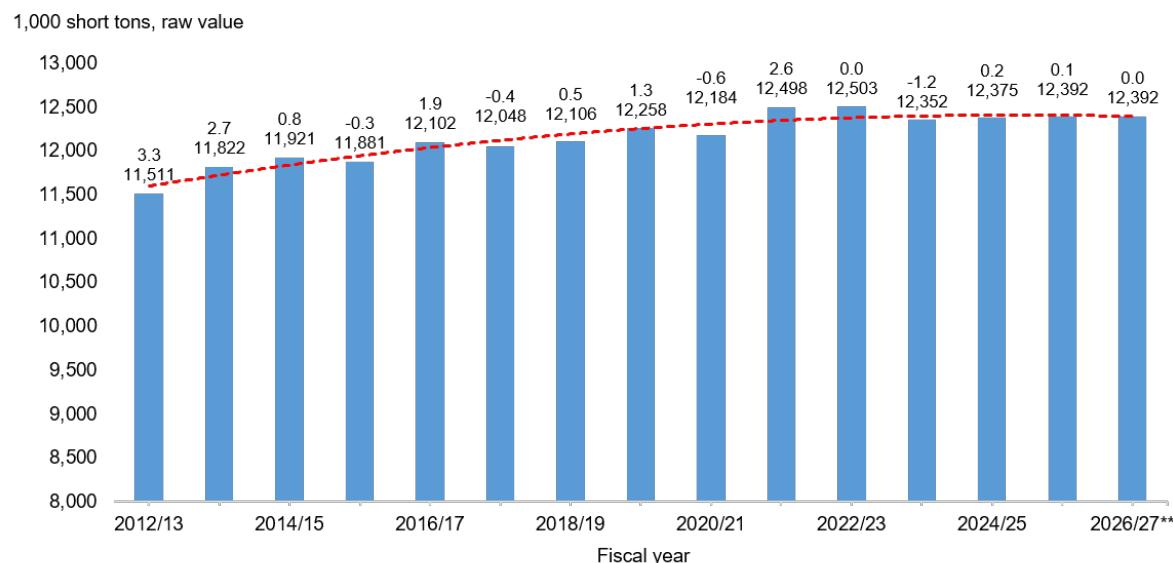
U.S. 2025/26 sugar deliveries for food and beverage use are lowered from last month by 50,000 STRV to 12.392 million, on a slower-than-expected delivery pace for 2 consecutive months. This estimate is carried over to 2026/27, reflecting a flat trend over a 3-year period (figure 3).

³ Mexico's final 2025/26 Export Limit to the United States that was calculated by the U.S. Department of Commerce in March (using the U.S. Needs formula) was 219,638 STRV and is lower than the estimate (247,000 STRV), based on U.S. Census and Customs preliminary trade data. One contributing factor is the unit conversion from the Mexican metric tons, *tel quel* (or actual weight) to U.S. metric tons, raw value terms since a fixed factor of 1.06 is applied to the Census and Customs trade data (originally in product weight basis), which does not account for polarity adjustments. The Department of Commerce oversees the accounting of Mexico's sugar exports to the United States under the Countervailing Duty and Antidumping Suspension Agreements and relies on several data sources that are not available to USDA, including proprietary data on contract-specific export licenses issued by the Government of Mexico.

⁴ For more information, please refer to the Federal Register Notice Volume 91, Number 183, pages 60487–60488.

Deliveries for refined beet sugar slowed down in July and August after a strong pace in January–June relative to last year and the 5-year average but are still up 4.3 percent year over year (table 5). With a month left in the current fiscal year, refined cane sugar cumulative deliveries continue to lag last year’s pace and are only slightly above the 5-year average. Non-reporter cumulative deliveries (also known as direct consumption imports, or DCI⁵) are relatively behind last year and the 5-year average and are at the lowest level in 6 years.

Figure 3
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.

⁵ U.S. sugar deliveries for human consumption are equal to the sum of beet and cane sugar deliveries, plus direct consumption imports (DCI). DCI are 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.

Table 5: U.S. sugar deliveries for food and beverage use, October–August

Components	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	5-year average	Annual change (2025/26 versus 2024/25)	
	1,000 STRV							Percent	
Beet sugar processors	4,514	4,889	4,595	4,413	4,510	4,705	4,584	195	4.3
Cane sugar refiners	5,800	5,839	5,994	6,252	6,119	6,086	6,001	-34	-0.6
Total reporters	10,314	10,728	10,588	10,664	10,630	10,790	10,585	161	1.5
Non-reporters (direct consumption)	878	791	826	569	708	566	755	-143	-20.2
Total	11,192	11,519	11,414	11,234	11,338	11,356	11,339	18	0.2
	Percent share in total							Percentage points	
Beet sugar processors	40	42	40	39	40	41	40	2	N/A
Cane sugar refiners	52	51	53	56	54	54	53	0	N/A
Total reporters	92	93	93	95	94	95	93	1	N/A
Non-reporters (direct consumption)	8	7	7	5	6	5	7	-1	N/A
Total	100	100	100	100	100	100	100	0	N/A

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

Note: Totals and percentages may not add due to rounding. "Reporters" refer to beet processors and cane refiners that report their data to the USDA, Farm Service Agency's monthly *Sweetener Market Data (SMD)* report. Years included in the 5-year average are 2020/21–2024/25.

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

Mexico's Sugar Outlook

For this month, most of the changes to Mexico's 2025/26 and 2026/27 sugar balance sheet are based on the USDA, FAS Mexico City Post's October 5 *Sugar Semi-Annual* report. Mexico's sugar production for the 2026/27 campaign (which usually starts in November) is unchanged at 5.377 million metric tons (MT), 1 percent higher than 2025/26 (table 6). The Post forecast for the 2026/27 harvested area is 748,000 hectares (ha), an increase of 2 percent from last year (table 7). Field yield is projected at 66.6 MT/ha (1 percent below last year's high level but above the 5-year average) and the sucrose recovery rate at 10.8 percent (higher than last year and the 5-year average). Mexico's first official outlook for 2026/27 sugar production is expected to be released by Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) in the coming weeks.

In terms of use, sugar deliveries for human consumption for both years are increased from last month, each by about 30,000 MT. Mexico's total sugar exports for 2025/26 are increased by 157,000 MT to 1 million, based on Post reporting, of which 212,000 MT is exported to the United States under the U.S.-Mexico suspension agreements. Note that the 212,000-MT volume was set to match U.S. 2025/26 sugar imports from Mexico in the U.S. balance sheet, which was based on U.S. Census Bureau data.

For 2025/26, the increase in Mexico's sugar exports and domestic sugar deliveries reduced ending stocks by 186,000 MT to 1.184 million. The reduced 2026/27 beginning stocks lowered available supplies, which in turn reduced the forecast for Mexico's total sugar exports. The portion of Mexico's 2026/27 sugar exports to the United States is unchanged at 1.017 million MT. Mexico's 2026/27 Export Limit to the United States will be recalculated 2 more times by the U.S. Department of Commerce (in December 2026 and in March 2027) to target a U.S. stocks-to-use ratio of 13.5 percent. Notwithstanding these future recalculations, Mexico's minimum level of access into the U.S. sugar market is set at about 712,000 MT. The net result of the 2026/27 changes is a 20,000-MT reduction to ending stocks (now at 1.124 million MT). Ending stocks for both years are estimated to include 150,000 MT of low polarity sugar (below 99.2 polarity) that are 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 6: Mexico's sugar supply and use by fiscal year (October–September), 1,000 metric tons, actual weight

	2024/25	2025/26			2026/27		
	Final	September	October	Monthly change	September	October	Monthly change
Beginning stocks	1,418	1,123	1,123	0	1,370	1,184	-185
Production	4,771	5,325	5,325	0	5,377	5,377	0
Imports	167	42	42	-1	28	28	0
Imports for consumption	154	30	29	-1	14	14	0
Imports for IMMEX	13	13	13	0	14	14	0
Total supply	6,355	6,491	6,490	-1	6,775	6,590	-186
Exports	1,023	843	1,000	157	1,387	1,193	-194
Exports to the United States and Puerto Rico	432	188	212	24	1,017	1,017	0
Exports to other countries 1/	591	655	788	134	370	176	-194
Deliveries to domestic users	4,209	4,278	4,306	27	4,245	4,274	28
Domestic consumption	3,901	3,945	3,972	27	3,929	3,958	28
IMMEX	323	333	333	0	316	316	0
Other deliveries, end-of-year statistical adjustment	-14			0			0
Total Use	5,232	5,121	5,306	185	5,632	5,466	-166
Ending stocks	1,123	1,370	1,184	-186	1,143	1,124	-20
Domestic	973	1,220	1,034	-186	993	974	-20
United States 2/	150	150	150	0	150	150	0
Stocks-to-domestic-consumption ratio (percent)	28.8	34.7	29.8	-4.9	29	28	-0.7
HFCS consumption (dry weight)	1,639	1,547	1,545	-2	1,507	1,510	3

IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación; HFCS = high-fructose corn syrup.

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

1/ Includes sugar 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 7: Mexico's sugar production, 2017/18–2026/27

Fiscal year	Harvested area (ha)	Sugarcane yield (MT per ha)	Sugarcane processed (1,000 MT)	Recovery (percent)	Agroindustrial yield (sugar MT per ha)	Sugar production (1,000 MT)
2017/18	784,661	67.97	53,336	11.27	7.66	6,010
2018/19	804,060	70.94	57,037	11.27	7.99	6,426
2019/20	783,486	62.89	49,274	10.71	6.74	5,278
2020/21	789,996	64.93	51,293	11.14	7.23	5,715
2021/22	799,774	68.37	54,681	11.31	7.73	6,185
2022/23	806,257	58.99	47,564	10.98	6.48	5,224
2023/24	743,119	62.03	46,093	10.20	6.33	4,704
2024/25	736,486	62.12	45,750	10.43	6.48	4,771
2025/26*	734,547	67.53	49,605	10.74	7.25	5,325
2026/27**	748,000	66.58	49,800	10.80	7.19	5,377
5-year average (2021/22–2025/26)	764,037	63.81	48,739	10.73	6.85	5,242

(*) = estimate; (**) = forecast; ha = hectares; MT = metric tons.

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

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