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Sugar and Sweeteners Outlook: November 2026

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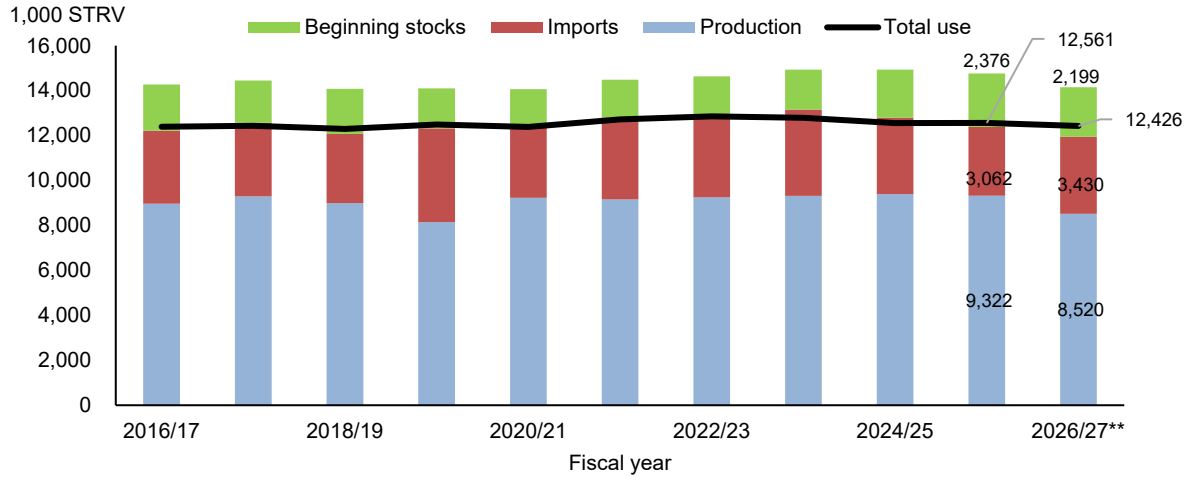
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U.S. 2026/27 Sugar Supply and Use Are Lowered

U.S. fiscal year 2025/26 (October 2025–September 2026) sugar supply and use are adjusted, based on the availability of full fiscal-year data from the USDA, Farm Service Agency and the USDA, Foreign Agricultural Service. For 2026/27, U.S. sugar supply is reduced 238,000 short tons, raw value (STRV) from last month to 14.149 million STRV, as lower beginning stocks and domestic production more than offset increased imports. Domestic sugar production is down almost 250,000 STRV to 8.520 million, the lowest since the weather-reduced 2019/20 output. U.S. 2026/27 sugar use is decreased 96,000 STRV to 12.426 million, solely on a reduction to sugar deliveries for human consumption, in line with the adjusted 2025/26 volume. Ending stocks are lowered 142,000 STRV to 1.723 million and the stocks-to-use ratio is 13.9 percent, down 1 percentage point.

Figure 1
U.S. sugar supply and use



Note: (*) denotes estimate, (**) 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* report.

U.S. Sugar Outlook

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

U.S. fiscal year 2025/26 (October 2025–September 2026) beet sugar production is raised from last month by 39,000 STRV to 5.077 million (table 1), on stronger-than-expected early season (August–September 2026) production published in the USDA, Farm Service Agency's *Sweetener Market Data* (*SMD*) September report. This actual early season production of 635,000 STRV is 39,000-STRV higher than the beet processors' estimate in last month's *SMD*.

For fiscal year 2026/27, U.S. beet sugar production is reduced from last month by 190,000 STRV to 4.552 million, the lowest level since 2019/20 and about 525,000 STRV below 2025/26, because of lower yield and harvested-area projections. This month, the national sugarbeet yield is reduced from 30.8 to 29.8 tons per acre, based on USDA, NASS's November *Crop Production* report (table 2). The 29.8 tons per acre is in line with the processors' submitted yield estimate (29.7 tons per acre) that was published in the *SMD*. The number is the lowest level in 4 years, likely due to the extended period of dry, warm weather since the summer (figure 2). The largest month-to-month yield decreases were for major producers Michigan (down 3.9 tons per acre to 25 tons) and Idaho (down 2.3 tons per acre to 38.3 tons).

Meanwhile, the national sugarbeet area harvested is unchanged at 1.009 million acres, the third lowest level in 47 years (behind 2019/20's 982,000 acres and 2008/09's 1.005 million acres). 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 reduced outlook for this year's beet sugar crop (arising from lower yield and harvested acreage expectations) is reflected in the atypical absence of Sosland Publishing's weekly *Sweetener Report's* 2026/27 refined beet sugar quotes in October due to the lack of offers. When the quotes resumed in the first 2 weeks of November, they were between 60 to 63 cents per pound, up 14 to 15 cents from last year at this time.

The estimate for sugarbeet shrink (7.66 percent based on beet processors' estimate submitted in the *SMD*) and sucrose recovery from sliced sugarbeets (14.79 percent based on a 10-year

average, 2015/16–2024/25) are unchanged. Sugar production next year (August–September 2027), which is based on a 5-year average (2021/22–2025/26), is adjusted downwards by 8,000 to 646,000 STRV after the inclusion of the actual August–September 2026 volume in the calculation.

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	October	November	Monthly change	October	November	Monthly change
Beginning stocks	2,141	2,376	2,376	0	2,231	2,199	-32
Total production	9,397	9,280	9,322	42	8,768	8,520	-248
Beet sugar	5,370	5,038	5,077	39	4,742	4,552	-190
Cane sugar	4,027	4,242	4,245	3	4,026	3,968	-58
Florida	1,932	1,957	1,957	0	1,819	1,757	-61
Louisiana	2,095	2,285	2,288	3	2,208	2,211	3
Texas 1/	0	0	0	0	0	0	0
Total imports	3,393	3,097	3,062	-35	3,388	3,430	43
Tariff-rate quota imports	1,534	1,299	1,299	0	1,391	1,391	0
Raw TRQ	1,003	1,045	1,045	0	1,136	1,136	0
Refined TRQ	252	21	21	0	21	21	0
FTA TRQ	280	234	234	0	235	235	0
Other program imports: for re-export and polyhydric	373	399	399	0	300	300	0
Non-program imports	1,485	1,399	1,364	-35	1,696	1,739	43
Mexico	504	247	247	0	1,188	1,188	0
High-tier tariff/other	980	1,152	1,117	-35	508	551	43
High-tier tariff	928	1,114	1,079	-35	508	551	43
Raw sugar	547	606	569	-37	0	41	41
Refined sugar	382	214	215	1	214	215	1
Refined sugar (specialty) 2/	NA	294	295	1	294	295	1
Other 3/	52	37	37	0	0	0	0
Total supply	14,931	14,753	14,760	7	14,387	14,149	-238
Total exports	111	25	27	2	25	25	0
Miscellaneous: end-of-year statistical adjustment	-41	0	140	140	0	0	0
Total deliveries	12,485	12,497	12,395	-102	12,497	12,401	-96
Domestic food and beverage	12,375	12,392	12,296	-96	12,392	12,296	-96
Other deliveries:	111	105	99	-6	105	105	0
Sugar-containing products re-export program	82	80	75	-5	80	80	0
Polyhydric alcohol, ethanol, other alcohol	14	15	11	-4	15	15	0
Livestock feed	15	10	13	3	10	10	0
Commodity Credit Corporation (CCC): ethanol, feed	0	0	0	0	0	0	0
Total use	12,555	12,522	12,561	40	12,522	12,426	-96
Ending stocks	2,376	2,231	2,199	-32	1,865	1,723	-142
Stocks-to-use ratio (percent)	18.9	17.8	17.5	-0.2	14.9	13.9	-1.0

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* report, 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.

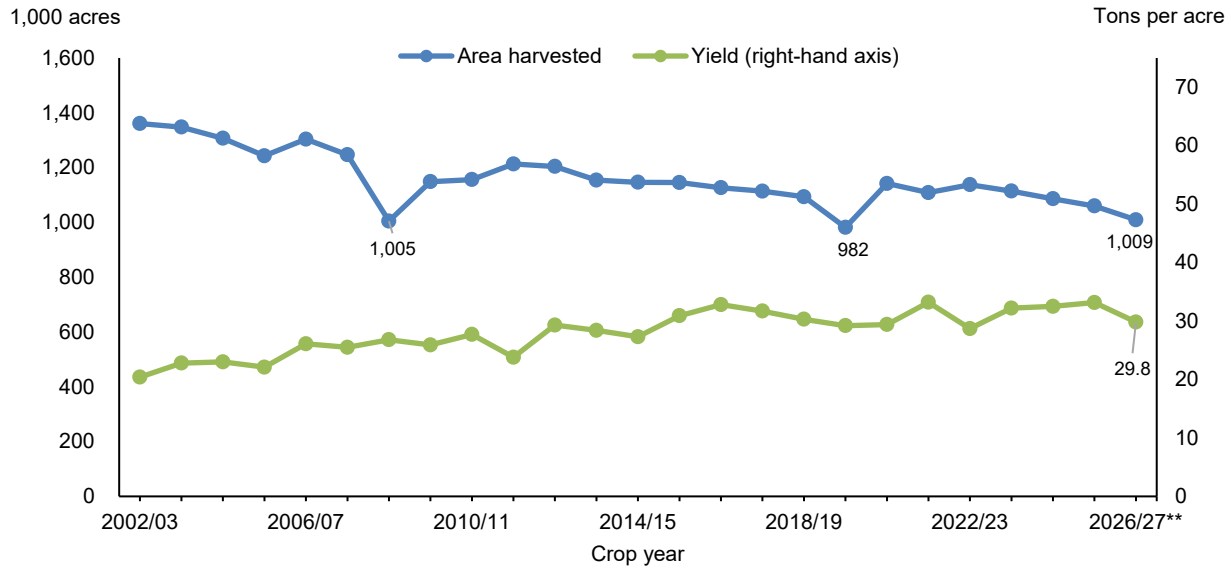
Source: USDA, Economic Research Service using USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report; USDA, Farm Service Agency, Sweetener Market Data report; and the USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

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

	2024/25 Final	2025/26 October	2025/26 November	Monthly change	2026/27 October	2026/27 November	Monthly change
Units are in 1,000 STRV unless specified							
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	30.85	29.81	-1.03
Sugarbeet production (1,000 tons)	35,316	35,140	35,140	0	31,136	30,092	-1,044
Sugarbeet shrink (percent)	7.90	8.59	8.27	-0.32	7.66	7.66	0.00
Sugarbeet sliced (1,000 tons)	32,527	32,122	32,233	111	28,752	27,788	-964
Sugar extraction rate from slice (percent)	15.46	14.74	14.69	-0.05	14.79	14.79	0.00
Sugar from beets sliced	5,030	4,736	4,734	-1	4,253	4,111	-143
Sugar from molasses	324	413	414	1	400	400	0
Crop year sugar production	5,354	5,148	5,148	0	4,653	4,511	-143
Sugar from imported beets	NA	0	0	NA	30	30	0
Aug.–Sep. sugar production	690	706	706	0	596	635	39
Aug.–Sep. sugar production: next crop	706	596	635	39	654	646	-8
Fiscal year sugar production	5,370	5,038	5,077	39	4,742	4,552	-190

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 (2015/16–2024/25).
4. Sugar from molasses for 2025/26 and 2026/27 is based on beet processors' estimates in the *SMD* report.
5. Early sugar production for August–September 2026 is based on beet processors' estimates in the *SMD* report, while August–September 2027 is based on a 5-year average (2021/22–2025/26).
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 data are 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.

Figure 2
U.S. sugarbeet area harvested and yield



Note: (*) denotes estimate, (**) denotes forecast, STRV = short tons, raw value.
Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service.

U.S. Cane Sugar Production Is Slightly Raised for 2025/26 and Lowered for 2026/27

Fiscal year 2025/26 U.S. cane sugar production is slightly raised from last month by 3,000 STRV to a new record 4.245 million STRV, solely based on adjustments made for Louisiana's output (table 3). Louisiana's 2025/26 fiscal year sugar production is raised to a record 2.288 million STRV, about 3,000 STRV higher than last month, based on the *SMD* report. Actual early sugar production in September 2026 (which is accounted for in fiscal year 2025/26) equaled 119,000 STRV, slightly lower than last month's estimate (120,000 STRV) but the second largest in history behind September 2024 (124,000 STRV). The 1,000-STRV reduction in early sugar production is more than offset by a 4,000-STRV increase in the State's 2025/26 crop year production, due to *SMD* adjustments in prior months.

For fiscal year 2026/27, U.S. cane sugar output is reduced 58,000 STRV from last month to 3.968 million STRV, about 275,000 STRV lower (7 percent) than 2025/26 and the lowest level since 2019/20. This month's downward adjustment is mainly driven by Florida, where sugar output is reduced 61,000 STRV to 1.757 million, the lowest level since 2010/11, based on a reduction in NASS's sugarcane-yield forecast. In its *November* Crop Production report, NASS lowered the State's yield from last month's 39.8 tons per acre to 39.5 tons, the lowest level since 2014/15 (and the first time since 2014/15 that the State's yield fell below 40 tons per acre), amid several challenges (mealybug infestation, drought during the growing season, and the February freeze).

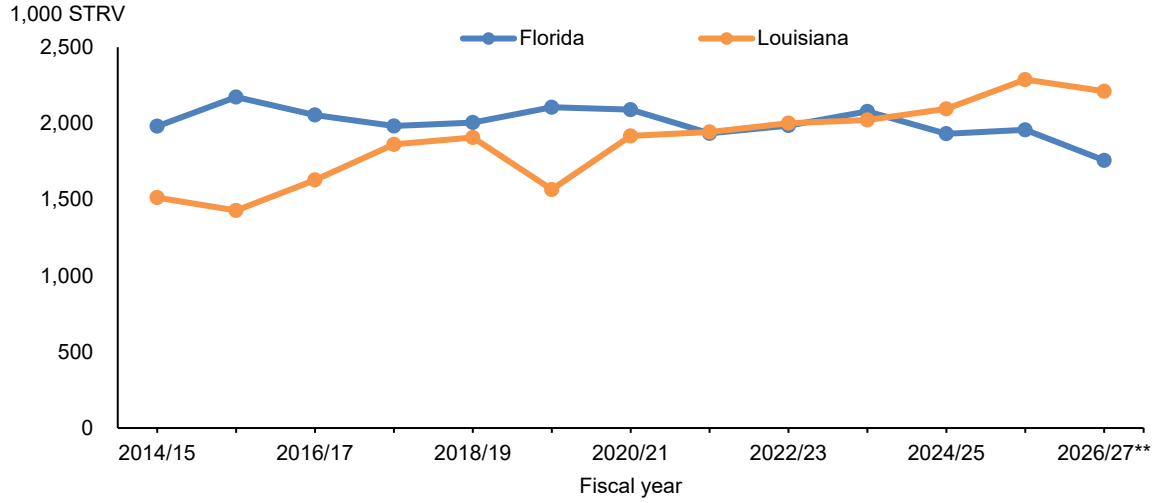
Meanwhile, Louisiana's fiscal year 2026/27 cane sugar production is raised 3,000 STRV from last month to 2.211 million, the second largest behind 2025/26, marking the third consecutive year of surpassing Florida (figure 3). The reduction in the State's yield (based on NASS) is more than offset by a higher outlook for early sugar production in September 2027 (based on an 8-year Olympic average 2018/19–2025/26) after the inclusion of the actual September 2026 volume in the calculation.

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	384
Sugarcane yield (tons per acre)	42.4	44.5	44.4	45.1	41.9	39.5
Sugarcane production for sugar (1,000 tons)	16,451	17,177	17,360	17,183	16,718	15,160
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	1,757
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	31.9
Sugarcane production for sugar (1,000 tons)	13,514	15,215	14,382	15,488	15,977	16,421
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	2,283	2,254
Sep. sugar production (1,000 STRV)	12	75	6	124	114	119
Sep. sugar production of the next crop (1,000 STRV) 1/	75	6	124	114	119	76
Fiscal year sugar production (1,000 STRV) 2/	1,944	2,001	2,022	2,095	2,288	2,211
Texas 3/						
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	899
Sugarcane yield (tons per acre)	34.9	37.1	36.1	37.2	36.2	35.1
Sugarcane production for sugar (1,000 tons)	31,021	33,090	32,113	32,671	32,695	31,581
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	4,240	4,012
Fiscal year sugar production (1,000 STRV)	4,002	4,063	4,141	4,027	4,245	3,968

(*) denotes estimate; (**) denotes forecast; STRV = short tons, raw value; Sep. = September.
Note: For the current year, NASS only provides forecast for area harvested, yield, and production for "sugarcane for sugar and seed" and only releases separate data for "sugarcane for sugar" and "sugarcane for seed" in the *Crop Production Annual Summary* report released every January. Thus, in the interim, the *WASDE* report, which reflects forecast for "sugarcane for sugar" only, adopts the NASS yield for "sugarcane for sugar and seed" but forecasts the area harvested and production using recent years' trend.
1/ Louisiana September sugar production for the next crop is based on an 8-year Olympic average (2018/19–2025/26).
2/ Louisiana fiscal year sugar production = total crop year sugar - sugar produced in September + sugar produced in September of the next crop.
3/ 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* (*WASDE*) report.

Figure 3
Cane sugar production in Florida and Louisiana

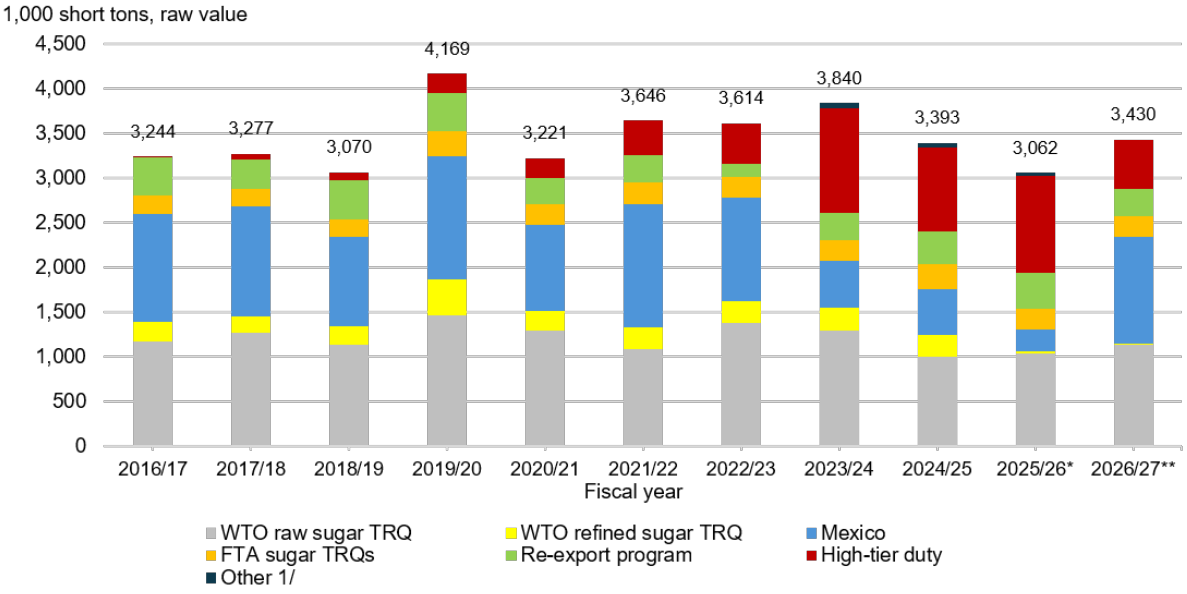


Note: (**) denotes forecast, STRV = short tons, raw value.
Source: USDA, Economic Research Service using data from USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* report.

U.S. Sugar Imports for 2025/26 Are Lowered; Raised for 2026/27

The U.S. 2025/26 sugar imports are lowered 35,000 STRV from last month to 3.062 million STRV, mainly on adjustments made to the "high-tier tariff/other sugar imports" line (figure 4). High-tier raw sugar imports are reduced 37,000 STRV to 569,000 STRV, the second largest behind 2023/24 (886,000 STRV). The combined high-tier refined sugar imports (consisting of refined sugar and refined specialty/organic sugar) are each raised 1,000 STRV from last month to 215,000 STRV and 295,000 STRV, respectively, partly offsetting the reduction in high-tier raw sugar imports.

Figure 4
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.

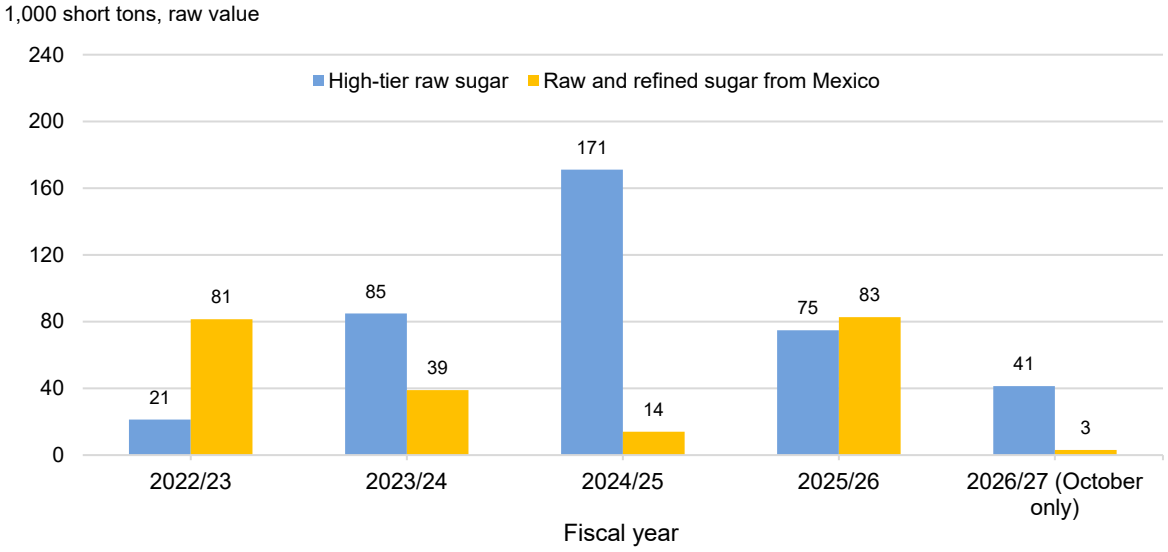
Source: USDA, Economic Research Service using USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report; USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

For 2026/27, U.S. sugar imports are raised 43,000 STRV to 3.430 million STRV, 368,000 STRV higher (12 percent) than 2025/26 and the highest level in 3 years, solely on adjustments to high-tier sugar imports. High-tier raw imports (which are only reflected in the balance sheet upon entry) have totaled 41,000 STRV in October. This number is in line with recent years' (2022/23–2025/26) average for this month, based on USDA, Foreign Agricultural Service's (FAS*) U.S. Sugar Monthly Import and Re-Exports* report and U.S. Department of Commerce, Bureau of the Census data.

Meanwhile, projected high-tier duty imports of traditional refined sugar and specialty refined (organic) sugar are slightly adjusted to 215,000 STRV and 295,000 STRV, respectively, for consistency with their corresponding 2025/26 levels.

Except for 2022/23, U.S. high-tier raw sugar imports *alone* between October–December (during which Mexico's sugarcane harvest is still at the early stages) have either surpassed or nearly matched *total* U.S. sugar imports from Mexico (both raw and refined sugar) (figure 5). This trend seems to continue in the current fiscal year. As shown in figure 5, in October, U.S. sugar total imports from Mexico were 3,000 STRV compared with 41,000 STRV of high-tier raw sugar imports. Thus, despite a reported set-aside of low polarity sugar inventory equal to 150,000 metric tons, actual weight (approximately 165,000 STRV), which was reflected in Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) balance sheet, it appears that this type of sugar that is specifically destined for the United States (under the U.S.-Mexico Sugar Suspension Agreements) may not be readily available for export during the first quarter of 2026/27.

Figure 5
U.S. imports of high-tier duty raw sugar and sugar from Mexico between October–December

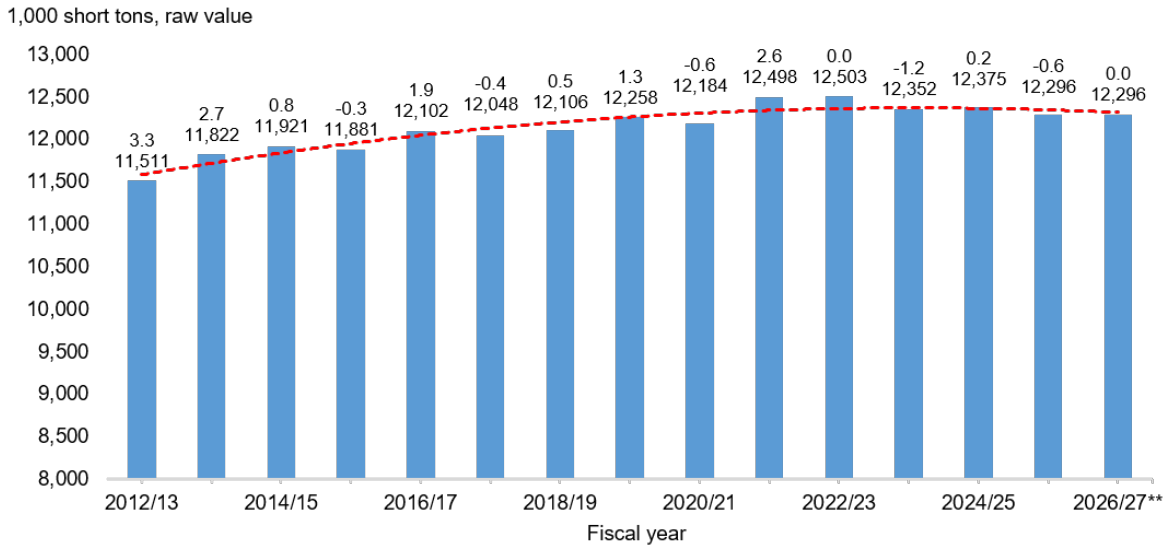


Source: USDA, Economic Research Service using USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report; USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

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

U.S. fiscal year 2025/26 sugar deliveries for food and beverage use are reduced 96,000 STRV from last month to 12.296 million STRV, the lowest level since 2020/21 (figure 6). This estimate is carried over to 2026/27. Since the summer, the pace of sugar delivered by beet processors, cane refiners, and non-reporters in the United States have been declining year over year. In the last fiscal year quarter (July–September), sugar deliveries totaled 3.082 million STRV, down from 3.327 million for the same period last year (figure 7). Relative to the previous year, deliveries from beet processors and cane refiners increased 1.2 percent to 11.756 million STRV, while non-reporter deliveries fell 28.5 percent to 540,000 STRV, the lowest level since 2007/08 (414,000 STRV). Refined beet sugar deliveries, which were competitively priced in 2025/26 (given the ample inventory) totaled 5.151 million STRV, 215,000 STRV (4.4 percent) larger than the prior year and thus offset a 79,000-STRV decline (1.2 percent) in cane sugar deliveries (table 4).

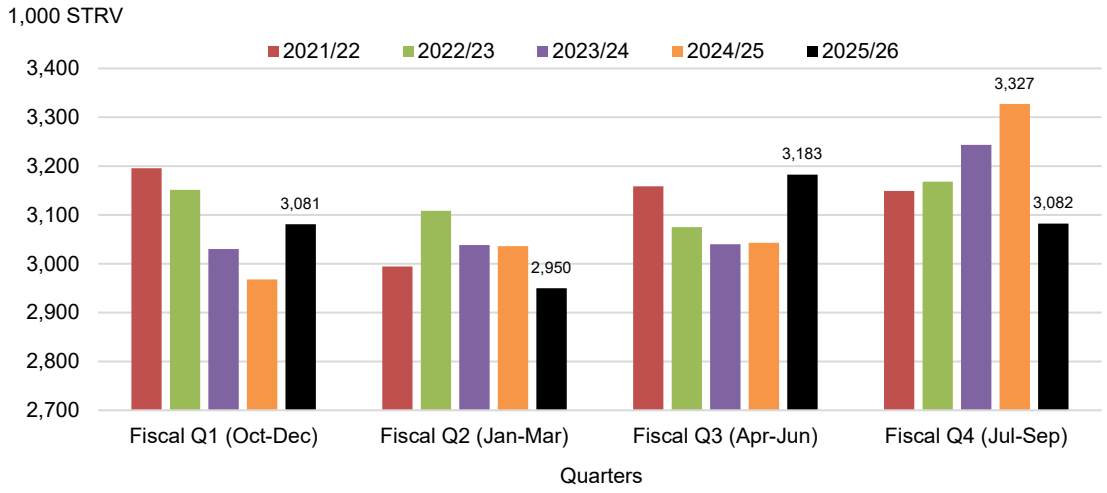
Figure 6
U.S. sugar deliveries for food and beverage use



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.

Figure 7

U.S. domestic sugar deliveries for food and beverage use



Note: Q = quarter; STRV = short tons, raw value.
Source: USDA, Economic Research Service using data from USDA, Farm Service Agency, *Sweetener Market Data* (*SMD*) report.

Table 4: U.S. sugar deliveries for food and beverage use, October–September

Components	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	5-year average	Annual change (2025/26 versus 2024/2025)	
	1,000 STRV								Percent
Beet sugar processors	4,966	5,326	5,027	4,856	4,936	5,151	5,022	215	4.4
Cane sugar refiners	6,288	6,377	6,537	6,808	6,684	6,605	6,539	-79	-1.2
Total reporters	11,254	11,703	11,564	11,664	11,620	11,756	11,561	136	1.2
Non-reporters (direct consumption)	930	795	939	688	755	540	822	-215	-28.5
Total	12,184	12,498	12,503	12,352	12,375	12,296	12,383	-79	-0.6
	Percent share in total								Percentage points
Beet sugar processors	41	43	40	39	40	42	41	2	N/A
Cane sugar refiners	52	51	52	55	54	54	53	0	N/A
Total reporters	92	94	92	94	94	96	93	2	N/A
Non-reporters (direct consumption)	8	6	8	6	6	4	7	-2	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

Mexico's 2025/26 sugar balance sheet is finalized based on the availability of full fiscal-year data from National Committee for the Sustainable Development of Sugarcane (CONADESUCA). For 2026/27, Mexico's sugar production, with the harvest expected to begin soon, is reduced 84,906 metric tons (MT) from last month to 5.292 million, based on FAS Post reporting (table 5). This 5.292-million-MT estimate is comparable to CONADESUCA's first official estimate of 5.289 million MT, released October 22 (table 6). While the two estimates are comparable, CONADESUCA assumes greater harvested area and sucrose recovery than Post but a lower field yield.

This month, Post lowered its outlook for yield (from last month's 66.6 tons per hectare to 66.5 tons) and sucrose recovery (from 10.8 percent to 10.6 percent). Contributing factors cited by Post include high input costs (e.g., fertilizers) and emerging pest pressure that threatens sugarcane development (e.g., white scale infestation, or *cochinilla blanca* in Spanish, in Campeche, Huasteca, and Pánuco).

Also, based on FAS Post reporting, 2026/27 domestic sugar deliveries for human consumption are lowered 42,000 MT from last month to 3.915 million MT but are offset by an increase of similar magnitude to sugar deliveries for the IMMEX program. The portion of Mexico's 2026/27 sugar exports to the United States is unchanged at 1.017 million MT, while sugar exports to destinations outside of the suspension agreements are lowered almost 100,000 MT to 77,000 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 30,000-MT increase to ending stocks (now at 1.154 million MT).

Table 5: Mexico's sugar supply and use by fiscal year (October−September), 1,000 metric tons, actual weight

	2024/25	2025/26			2026/27		
	Final	October	November	Monthly change	October	November	Monthly change
Beginning stocks	1,418	1,123	1,123	0	1,184	1,201	17
Production	4,771	5,325	5,325	0	5,377	5,292	-85
Imports	167	42	41	-1	28	28	0
Imports for consumption	154	29	41	12	14	28	14
Imports for IMMEX	13	13	0	-13	14	0	-14
Total supply	6,355	6,490	6,489	-1	6,590	6,521	-68
Exports	1,023	1,000	1,082	82	1,193	1,094	-99
Exports to the United States and Puerto Rico 1/	432	212	212	0	1,017	1,017	0
Exports to other countries 2/	591	788	870	82	176	77	-99
Deliveries to domestic users	4,209	4,306	4,207	-99	4,274	4,274	0
Domestic consumption	3,901	3,972	3,879	-93	3,958	3,915	-42
IMMEX	323	333	353	19	316	359	43
Other deliveries, end-of-year statistical adjustment	-14		-25	-25			0
Total Use	5,232	5,306	5,289	-17	5,466	5,368	-99
Ending stocks	1,123	1,184	1,201	16	1,124	1,154	30
Domestic	973	1,034	1,201	166	974	1,004	30
United States 3/	150	150		-150	150	150	0
Stocks-to-domestic-consumption ratio (percent)	28.8	29.8	31.0	1.1	28	29	1.1
HFCS consumption (dry weight)	1,639	1,545	1,551	6	1,510	1,507	-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/ Mexico's sugar exports to the United States are based on U.S. Department of Commerce, Bureau of the Census data of U.S. sugar imports from Mexico.
2/ Includes sugar exports participating in the U.S. re-export programs.
3/ 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 6: Mexico's sugar production, 2017/18–2026/27

Fiscal year	Harvested area (ha)	Sugarcane yield (MT per ha)	Sugarcane processed (1,000 MT)	Sucrose recovery (percent)	Agroindustrial yield (sugar MT per ha)	Sugar production (1,000 MT)
2017/18	784,661	68.0	53,336	11.3	7.7	6,010
2018/19	804,060	70.9	57,037	11.3	8.0	6,426
2019/20	783,486	62.9	49,274	10.7	6.7	5,278
2020/21	789,996	64.9	51,293	11.1	7.2	5,715
2021/22	799,774	68.4	54,681	11.3	7.7	6,185
2022/23	806,257	59.0	47,564	11.0	6.5	5,224
2023/24	743,119	62.0	46,093	10.2	6.3	4,704
2024/25	736,486	62.1	45,750	10.4	6.5	4,771
2025/26*	734,547	67.5	49,605	10.7	7.3	5,325
2026/27** *WASDE*	748,000	66.5	49,742	10.6	7.1	5,292
2026/27** CONADESUCA	782,270	62.3	48,709	10.9	6.8	5,289

(*) = 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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