



Sugar and Sweeteners Outlook: April 2024

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Mexico Sugar Production Reduced; U.S. Sugar Supply Increased

In the April *World Agricultural Supply and Demand Estimates (WASDE)*, the forecast for Mexico's 2023/24 sugar production is reduced from last month by 175,000 metric tons (MT), actual weight, to a 25-year low of 4.572 million MT. Consequently, exports to the United States are reduced by 143,000 MT to 427,000, the lowest in 17 years and about 13-percent lower than the maximum exports Mexico indicated it can supply during the March consultation with the U.S. Department of Commerce. Due to the reduced crop, Mexico's Secretaría de Economía announced on April 5 that sugar imports benefitting from USDA re-export programs would be temporarily allowed duty-free until August 31 to fulfill Industria Manufacturera, Maquiladora y de Servicios de Exportación (IMMEX) requirements.

The U.S. 2023/24 supply is raised by 58,000 short tons, raw value (STRV) to 14.474 million as the reduction in beet sugar production due to lower sucrose recovery is offset by the increase in imports. Based on a strong pace, the raw sugar component of high-tier duty imports is increased by 140,000 STRV, raising the total to a record 855,000 STRV. Thus, high-tier duty imports would overtake Mexico as the second largest import category behind raw sugar tariff-rate quota. Exports are raised by 38,000 STRV to 198,000 on expectation of additional exports to Mexico. With domestic deliveries unchanged at 12.555 million STRV, ending stocks are raised by 21,000 STRV to 1.722 million. The corresponding stocks-to-use ratio is 13.5 percent, up from last month's 13.4 percent.

U.S. Outlook Summary

U.S. Sugar Supply Raised on Higher Imports

In the April *World Agricultural Supply and Demand Estimates (WASDE)*, the U.S. 2023/24 sugar supply is raised from last month by 58,000 short tons, raw value (STRV) to 14.474 million as a 27,000-STRV reduction to 9.215 million in domestic sugar production is offset by an 86,000-STRV increase to 3.417 million in imports (table 1). Although cane sugar production is unchanged at 4.071 million STRV, beet sugar production is reduced 27,000 STRV to 5.144 million on a lower forecast for sucrose recovery.

A 167,000-STRV reduction in imports from Mexico to a 17-year low of 499,000 STRV is offset by the combined 253,000-STRV increases in sugar imported under the raw sugar tariff-rate quota (TRQ), re-export programs, and high-tier duty. Raw sugar TRQ imports are up by 25,000 STRV to 1.303 million on higher volume expected from Argentina and Panama. Re-export program imports are raised 88,000 STRV to 288,000 on the expectation that U.S. program participants will take advantage of Mexico's April 5 announcement that temporarily allows duty-free imports of sugar participating in the U.S. re-export import programs to fulfill Industria Manufacturera, Maquiladora y de Servicios de Exportación (IMMEX) requirements. Mexico's sugar imports for IMMEX purposes are correspondingly increased by 88,000 STRV (or 75,000 metric tons raw value). (See the Mexico Outlook section of this report). U.S. high-tier duty raw sugar imports are raised by 140,000 STRV to a record 615,000 on the assumption that the continued strong pace will continue particularly given the decline in expected raw sugar imports from Mexico. With the refined sugar component unchanged at 240,000 STRV, total high-tier duty imports are raised to 855,000 STRV, also a record, overtaking Mexico as the second largest import source in 2023/24 behind raw sugar TRQ.

U.S. exports are raised by 38,000 STRV to 198,000, of which 88,000 represents the portion of U.S. re-export program sugar that will be exported to Mexico after the April 5 announcement. The remaining (110,000 STRV) represents U.S. exports through February (70,000 STRV) and additional volume expected based on pace (40,000 STRV). Domestic deliveries for consumption remain at 12.450 million STRV. With nonfood use delivery also unchanged at 105,000 STRV, use is increased by 38,000 to 12.753 million. Since the increase in supply more than offsets that of use, ending stocks are up from last month by 21,000 STRV to 1.722 million, which translates

to a 13.5 percent stocks-to-use ratio, up from last month's 13.4 percent.

Table 1: U.S. sugar supply and use by fiscal year (October–September), April 2024

	2022/23			2023/24		
	March (estimate)	April (estimate)	Monthly change	March (forecast)	April (forecast)	Monthly change
	1,000 short tons, raw value					
Beginning stocks	1,820	1,820	0	1,843	1,843	0
Total production	9,250	9,250	0	9,243	9,215	-27
Beet sugar	5,187	5,187	0	5,172	5,144	-27
Cane sugar	4,063	4,063	0	4,071	4,071	0
Florida	1,985	1,985	0	2,095	2,095	0
Louisiana	2,001	2,001	0	1,936	1,936	0
Texas	76	76	0	40	40	0
Total imports	3,614	3,614	0	3,331	3,417	86
Tariff-rate quota imports	1,862	1,862	0	1,750	1,775	25
Other program imports	141	141	0	200	288	88
Non-program imports	1,611	1,611	0	1,381	1,354	-27
Mexico	1,156	1,156	0	666	499	-167
High-duty	455	455	0	715	855	140
Total supply	14,685	14,685	0	14,416	14,474	58
Total exports	82	82	0	160	198	38
Miscellaneous	171	171	0	0	0	0
Total deliveries	12,589	12,589	0	12,555	12,555	0
Domestic food and beverage use	12,473	12,473	0	12,450	12,450	0
To sugar-containing products re-export program	94	94	0	80	80	0
For polyhydric alcohol, feed, other alcohol	22	22	0	25	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0	0
Total use	12,843	12,843	0	12,715	12,753	38
Ending stocks	1,843	1,843	0	1,701	1,722	21
Private	1,843	1,843	0	1,701	1,722	21
Commodity Credit Corporation	0	0	0	0	0	0
Stocks-to-use ratio (percent)	14.3	14.3	0.0	13.4	13.5	0.1

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

Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)*.

U.S. Beet Sugar Production Reduced

U.S. beet sugar production in crop year 2023/24 is reduced from last month by 27,000 STRV to 5.128 million STRV on a lower sucrose recovery forecast (table 2). Sucrose recovery (the percent of sugar recovered from sliced sugarbeets) is reduced from 15.02 percent to 14.93 percent based on processors' actual production through February in the Farm Service Agency Sweetener Market Data (SMD) (figure 1). The slicing campaign for processors in the western

part of the country is mostly done, while it is expected to conclude by the end of April in Michigan and by May in the Red River Valley¹. Pile management continues to be challenging due to the unseasonably warm winter weather that prevented outside piles to completely freeze², resulting in beet pile spoilage and discards in some areas.

With no changes to the forecast for early production in August–September 2024 and sugar from imported beets, fiscal year 2023/24 is also lowered by the same magnitude (27,000 STRV) to 5.144 million STRV, reflecting a 1-percent reduction from last year’s 5.187 million.

Table 2: U.S. beet sugar production, 2021/22–2023/24

	2021/22 Final	2022/23 Final	2023/24 March	2023/24 April	Monthly change
Sugarbeet production (1,000 short tons) 1/	36,772	32,644	35,226	35,226	0
Sugarbeet shrink (percent)	7.95	6.39	9.00	9.00	0.00
Sugarbeet sliced (1,000 short tons)	33,850	30,558	32,056	32,056	0
Sugar extraction rate from slice (percent)	14.63	15.35	15.02	14.93	-0.09
Sugar from beets sliced (1,000 STRV) 2/	4,954	4,690	4,813	4,786	-27
Sugar from molasses (1,000 STRV) 2/	341	372	342	342	0
Crop year sugar production (1,000 STRV) 2/	5,294	5,061	5,155	5,128	-27
Aug.–Sep. sugar production (1,000 STRV)	676	537	663	663	0
Aug.–Sep. sugar production of subsequent crop (1,000 STRV)	537	663	644	644	0
Sugar from imported beets (1,000 STRV) 3/	N/A	N/A	35	35	0
Fiscal year sugar production (1,000 STRV)	5,155	5,187	5,172	5,144	-27

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

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

1/ USDA, National Agricultural Statistics Service.

2/ August–July.

3/ Sugar from imported beets are already included in the final crop year production. Typically, this component is separated for projection purposes and included in the total once the full crop year slice is available.

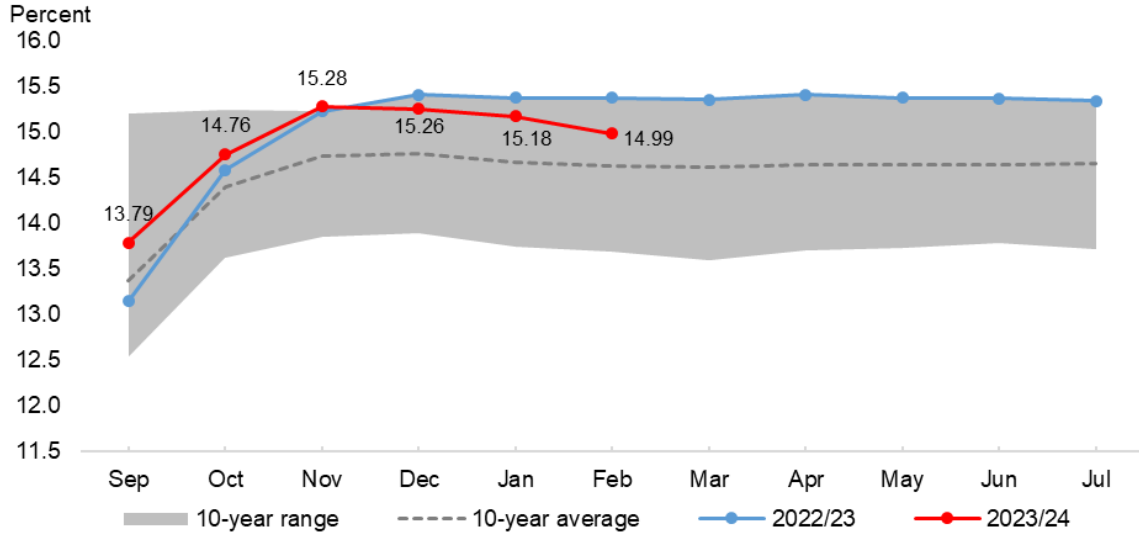
Source: USDA, Economic Research Service; USDA, World Agricultural Outlook Board; USDA, Farm Service Agency.

¹ The Red River Valley region refers to sugarbeet growing areas in Minnesota and North Dakota.

² The process of deep-freezing stops the respiration within the sugarbeets that are stored outside or in sheds—thereby minimizing the loss of sugar from deterioration—by using the frigid winter air to pass through the storage piles by ventilation.

Figure 1

U.S. cumulative beet sugar extraction, crop year 2013/14–2023/24



Note: Extraction rate = 100 * (sugar produced from sliced beets / sliced beets).

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

2024/25 U.S. Sugarbeet Prospective Plantings Released

The initial forecast for the 2024/25 sugarbeet planted acreage was published in the National Agricultural Statistics Service’s (NASS) March 28 *Prospective Plantings* report, which indicates growers’ intentions prior to the start of actual planting operations. NASS projected planting intentions at 1.129 million acres, a decrease of 8,400 (0.7 percent) from 2023/24’s planted acres of 1.137 million (figure 2).

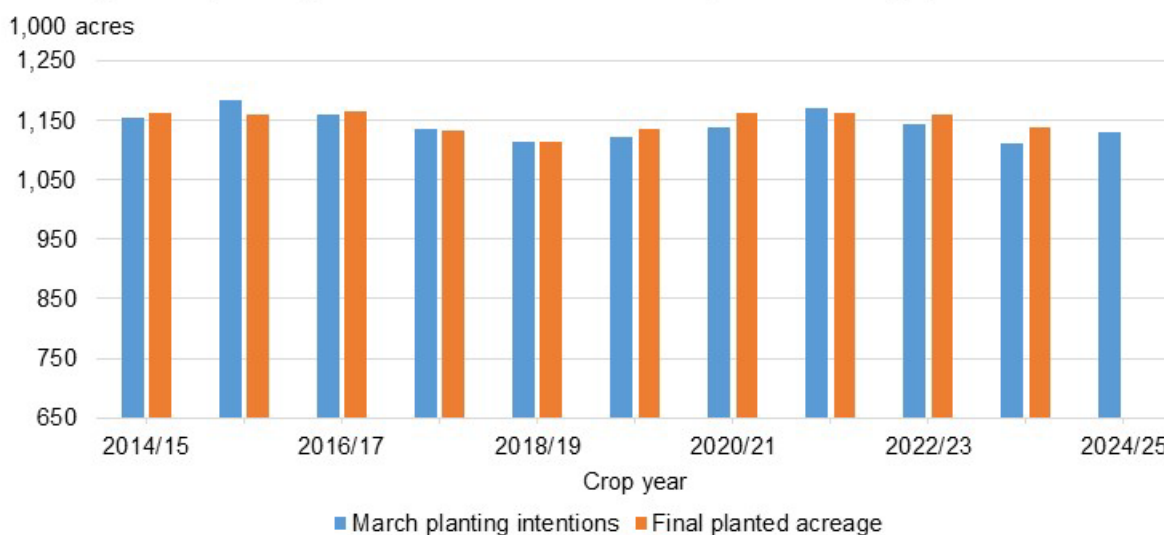
Since the final planted acreage can include additional acres to offset potential losses from factors such as weather-delayed spring planting, comparing this year’s planting intentions with those from the previous years can provide a better insight into processors’ original campaign plans. In this case, the 2024/25 planting intentions of 1.129 million acres would be larger by 18,200 (1.6 percent) than last year’s 1.111 million due to increases across all the regions: 0.8 percent in the Great Lakes; 1.1 percent in Upper Midwest (also referred to as the Red River Valley); 1.6 percent in the Great Plains; and 4 percent in the Pacific Northwest (table 3). Among several factors, sugarbeet planted area is heavily influenced by the factories’ optimal slicing capacity.

2024/25 U.S. Sugarbeet Planting Underway

Sugarbeet planting for 2024/25 is underway in 3 of the 4 the major-producing States³ according to the USDA, National Agricultural Statistics Service April 15 *Crop Progress*. Planting is 16 percent complete in Idaho, 14 percent in Michigan, and 2 percent in Minnesota; it has not begun in North Dakota. In the 4-State aggregate, planting is 6 percent complete, up from last week (2 percent) but lower than the 5-year average (11 percent) due to cold, rainy spring weather. The soil needs to be dry for field preparation and planting to begin and requires ideal temperature for seed germination. Since planting typically occurs in late April to early May to allow the sugarbeets sufficient time to deposit sugar, there is still time for growers to plant.

Figure 2

U.S. sugarbeet planting intentions in March and final planted acreage, 2014/15–2024/25



Source: USDA, National Agricultural Statistics Service.

³ Area planted in Idaho, Michigan, Minnesota, and North Dakota comprised 86 percent of the 2023/24 U.S. sugarbeet acreage.

Table 3: U.S. sugarbeet planting intentions in March, crop year 2019/20–2024/25

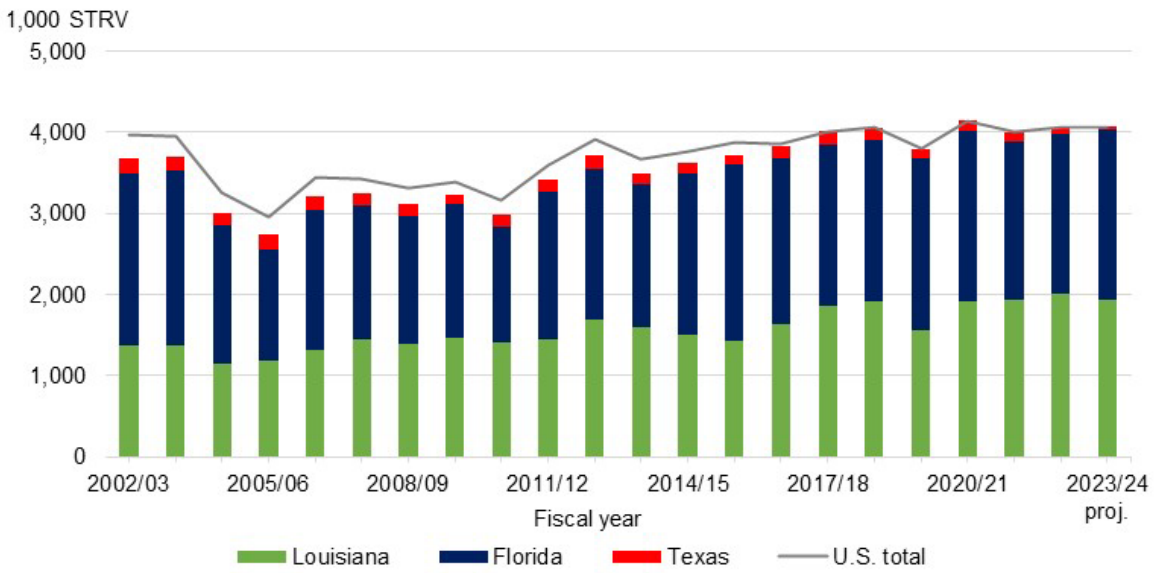
Region and State	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2024/25 versus 2023/24	
							1,000 acres	Percent
	1,000 acres							
Great Lakes	147	150	155	145	133	134	1	0.8
Michigan	147	150	155	145	133	134	1	0.8
Upper Midwest	620	641	663	650	647	654	7	1.1
Minnesota	417	427	440	424	433	440	7	1.6
North Dakota	203	214	223	226	214	214	0	0.0
Great Plains	150	143	142	144	126	128	2	1.6
Colorado	27	25	24	25	23	23	0	0.0
Montana	47	43	42	43	24	26	2	8.3
Nebraska	44	44	48	45	49	49	0	0.0
Wyoming	33	32	28	31	30	30	0	0.0
Pacific Northwest	203	204	209	204	205	213	8	4.0
California	25	24	24	24	18	23	5	27.8
Idaho	167	168	173	170	175	177	2	1.1
Oregon	10	10	10	9	10	11	1	10.0
Washington	2	2	2	2	2	2	0	11.1
U.S.	1,120	1,139	1,169	1,143	1,111	1,129	18	1.6

Source: USDA, Economic Research Service calculations using data from USDA, National Agricultural Statistics Service.

U.S. Cane Sugar Production Forecast Unchanged

The U.S. cane sugar production forecast for fiscal year 2023/24 remains at 4.071 million STRV, slightly above last year (4.063 million STRV) and will be the second largest in recent years behind 2020/21 (4.142 million STRV) (figure 3). Sugar production in Florida is estimated at 2.095 million STRV, followed by Louisiana (1.936 million) and Texas (40,000) where harvest campaigns ended in January and February, respectively. The campaign in Florida was extended by 2–4 weeks to make up for harvest delays in January due to unseasonal rains and is expected to finish in May.

Figure 3
U.S. production of cane sugar by State, fiscal year 2002/03–2023/24



STRV = short tons, raw value; proj. = projected.

Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)*.

Total U.S. Sugar Imports Increased

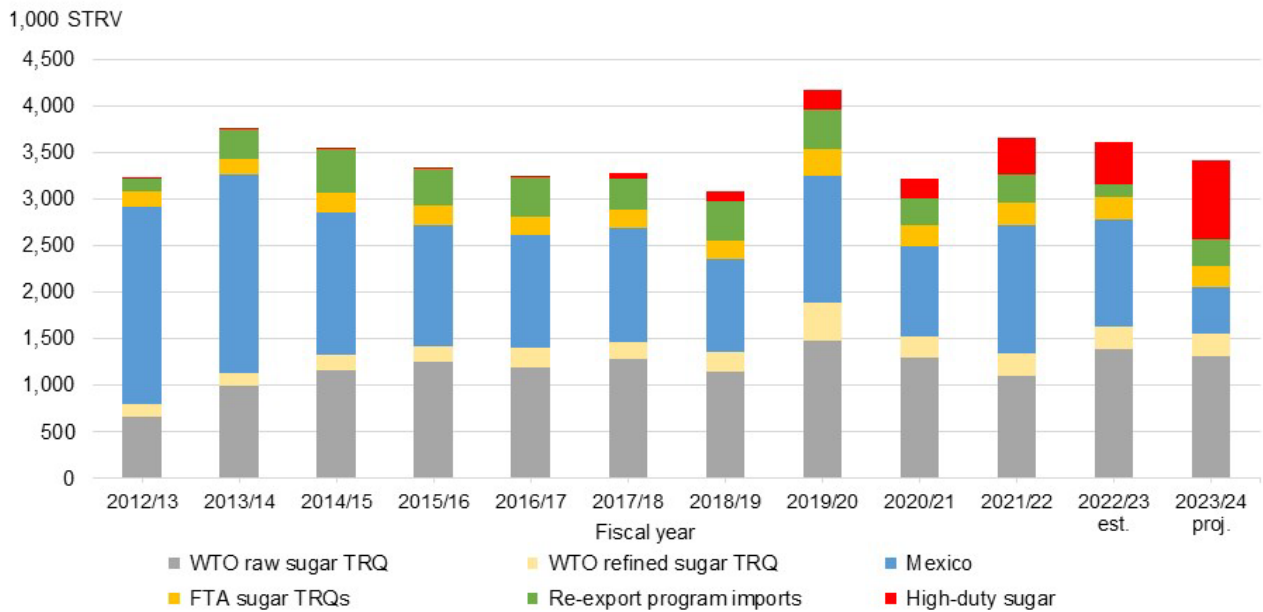
U.S. 2023/24 sugar imports are raised from last month by 86,000 STRV to 3.417 million as the reduction in imports from Mexico is countered by the combined increases in sugar imported under the raw sugar tariff-rate quota (TRQ), re-export programs, and high-tier duty (figure 4). Despite the increase to 3.417 million, imports in the current year would be about 200,000-STRV below (5 percent) last year and 126,000-STRV (4 percent) below the 5-year average (table 4).

Raw sugar TRQ imports in 2023/24 are increased by 25,000 STRV to 1.303 million on higher volume expected from Argentina and Panama. Correspondingly, the forecast for raw sugar TRQ shortfall is adjusted downward by 25,000 STRV to 67,000. Despite the increase, the 1.303 million STRV forecast in 2023/24 is 82,000-STRV lower (6 percent) than last year's 1.384 million. However, raw sugar TRQ imports remain the largest source, contributing about 38 percent of the total 2023/24 imports.

Re-export program imports are raised 88,000 STRV to 288,000 on the expectation that U.S. program participants will take advantage of Mexico's April 5 announcement temporarily allowing duty-free imports of sugar participating in the U.S. re-export import programs to fulfill IMMEX requirements. Mexico's sugar imports for IMMEX purposes are correspondingly increased by

88,000 STRV (or 75,000 metric tons raw value). (See the Mexico Outlook section of this report).

Figure 4
U.S. sugar imports by type, fiscal year 2012/13–2023/24



STRV = short tons, raw value; FTA = free trade agreement; WTO = World Trade Organization; TRQ = tariff-rate quota; est. = estimated; proj. = projected.

Source: USDA, Foreign Agricultural Service.

Table 4: U.S. sugar imports by category, fiscal year 2018/19–2023/24

Fiscal year	2018/19	2019/20	2020/21	2021/22	2022/23 est.	2023/24 proj.	5-year average	Over-the-year change (2023/24 versus 2022/23)		
	1,000 short tons, raw value (STRV)							STRV	Percent	
Mexico	1,000	1,376	968	1,379	1,156	499	1,176	-657	-56.9	
WTO raw sugar TRQ	1,144	1,468	1,296	1,096	1,384	1,303	1,278	-82	-5.9	
WTO refined sugar TRQ	207	408	217	237	241	252	262	11	4.6	
FTA sugar TRQ	190	276	236	246	237	220	237	-16	-6.9	
Re-export program	438	432	292	298	141	288	320	147	103.6	
High-duty sugar	91	206	212	390	455	855	271	400	88.0	
Total	3,070	4,165	3,221	3,646	3,614	3,417	3,543	-197	-5.5	
Share of category in fiscal year		Percent						Percentage point		
Mexico	32.6	33.0	30.0	37.8	32.0	14.6	33.1	-17.4		
WTO raw sugar TRQ	37.3	35.2	40.2	30.1	38.3	38.1	36.2	-0.2		
WTO refined sugar TRQ	6.7	9.8	6.7	6.5	6.7	7.4	7.3	0.7		
FTA sugar TRQ	6.2	6.6	7.3	6.7	6.5	6.4	6.7	-0.1		
Re-export program	14.3	10.4	9.1	8.2	3.9	8.4	9.2	4.5		
High-duty sugar	3.0	4.9	6.6	10.7	12.6	25.0	7.6	12.4		
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0			
Pace-to-date: Oct.–Mar.		1,000 short tons, raw value (STRV)						STRV		Percent
Mexico	359	430	326	520	563	355	440	-208	-37.0	
WTO raw sugar TRQ	705	723	867	718	733	648	749	-85	-11.6	
WTO refined sugar TRQ	128	207	106	147	148	144	147	-4	-2.7	
FTA sugar TRQ	70	106	83	112	130	120	100	-9	-7.3	
Re-export program	242	217	81	135	42	55	143	14	32.5	
High-duty sugar	41	56	109	135	150	434	98	284	190.1	
Total	1,544	1,739	1,571	1,767	1,765	1,756	1,677	-9	-0.5	
Share of pace-to-date in fiscal year		Percent						Percentage point		
Mexico	35.9	31.3	33.7	37.7	48.7	71.1	37.5	22.5		
WTO raw sugar TRQ	61.6	49.3	66.9	65.5	53.0	49.7	59.2	-3.2		
WTO refined sugar TRQ	61.6	50.6	48.7	61.8	61.4	57.1	56.8	-4.3		
FTA sugar TRQ	36.8	38.3	35.1	45.5	54.8	54.6	42.1	-0.2		
Re-export program	55.2	50.3	27.6	45.4	29.3	19.1	41.5	-10.2		
High-duty sugar	45.0	27.3	51.4	34.7	32.9	50.7	38.3	17.9		
Total	50.3	41.8	48.8	48.5	48.8	51.4	47.6	2.6		

WTO = World Trade Organization; TRQ = tariff-rate quota; FTA = free trade agreement; est. = estimated; proj. = projected.

Note: Totals may not add due to rounding.

Source: USDA, Economic Research Service calculations using data from USDA, Foreign Agricultural Service.

U.S. Imports of High-tier Duty Raw Sugar Surpasses Imports from Mexico

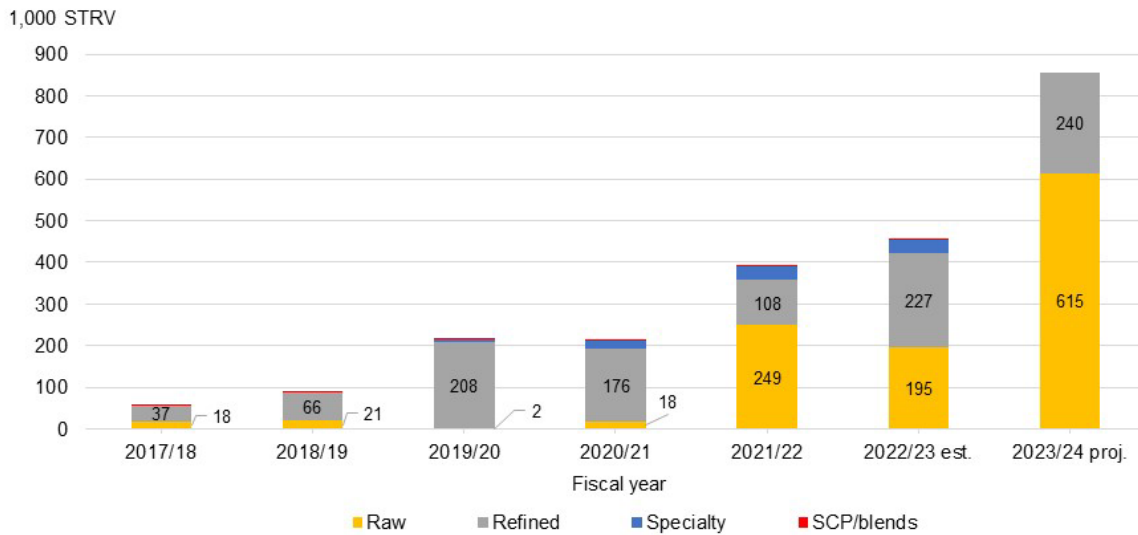
Last month's 475,000-STRV forecast for the 2023/24 high-tier duty raw sugar imports is raised by 140,000 STRV to a record 615,000 on the assumption that the strong pace will continue (figure 5). Cumulative high-tier duty raw sugar imports through February amounted to about 302,000 STRV, the largest volume over this period (figure 6).

The 2023/24 forecast for the high-tier raw sugar component (615,000 STRV) is projected to surpass total imports from Mexico (499,000 STRV) by 116,000 STRV or 23 percent, as well as

would be larger than raw sugar imports from Mexico (374,000 STRV⁴) by 241,000-STRV or 64 percent.

With the high-tier duty refined sugar component unchanged at 240,000 STRV, total high-tier duty imports are raised to 855,000 STRV, also a record. At this record volume, high-tier duty would overtake Mexico as the second largest import source behind raw sugar TRQ, contributing a historic high 25 percent of the 2023/24 total (3.417 million STRV).

Figure 5
U.S. high-tier duty sugar imports, by type of sugar, fiscal year total, 2017/18–2023/24



STRV = short tons, raw value; est. = estimated; proj. = projected; SCP = sugar-containing products.

Note: The Harmonized Tariff Schedule (HTS) lines are 1701.12.5000, 1701.13.5000, and 1701.14.5000 for raw sugar; 1701.91.3000, 1701.99.5025, 1701.99.5050, for refined sugar; 1701.99.5015 and 1701.99.5017 for specialty sugar including organic; and 1702.90.2000, and 2106.90.4600 for SCP/blends.

Source: USDA, Economic Research Service calculations using U.S. Department of Commerce, Bureau of the Census trade data from the U.S. International Trade Commission's *DataWeb*.

⁴ The 374,000 STRV is calculated using the following formula and numbers from the 2023/24 Mexico supply and use balance in Table 7:

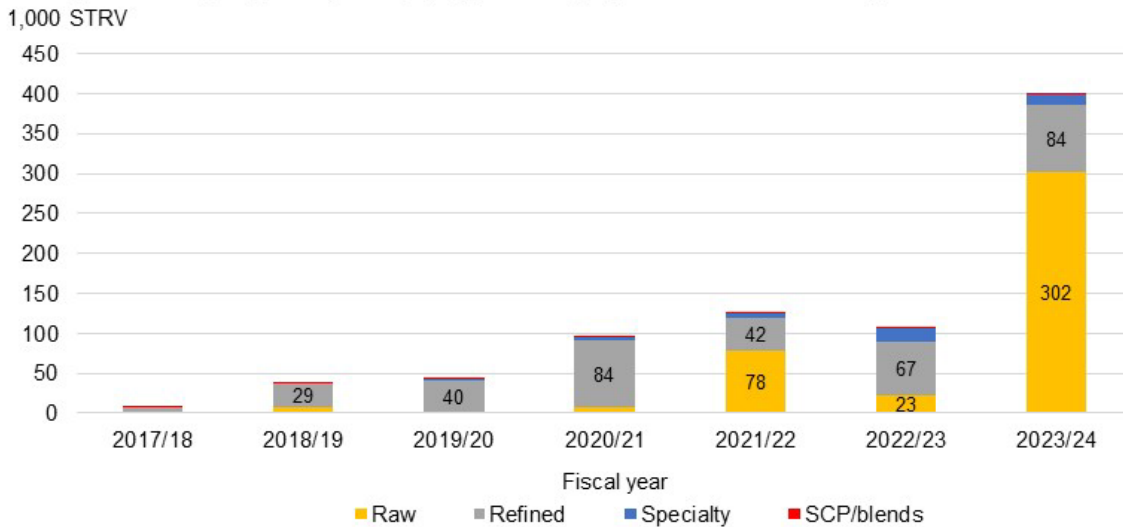
= Mexico's sugar production (metric tons, actual weight) * 7 percent share of low polarity sugar * conversion factor to short tons, raw value

= 4.572 metric tons, actual weight * 0.07 * ((2204.6225 / 2000) * 1.06)

= 374,000 short tons, raw value of low polarity sugar, all of which is assumed will be exported as raw sugar to the United States

Figure 6

U.S. high-tier duty sugar imports, by type of sugar, October to February, 2017/18–2023/24



STRV = short tons, raw value; est. = estimated; proj. = projected; SCP = sugar-containing products.

Note: The Harmonized Tariff Schedule (HTS) lines are 1701.12.5000, 1701.13.5000, and 1701.14.5000 for raw sugar; 1701.91.3000, 1701.99.5025, 1701.99.5050, for refined sugar; 1701.99.5015 and 1701.99.5017 for specialty sugar including organic; and 1702.90.2000, and 2106.90.4600 for SCP/blends.

Source: USDA, Economic Research Service's calculation using U.S. Department of Commerce, Bureau of the Census trade data from the U.S. International Trade Commission's *DataWeb*.

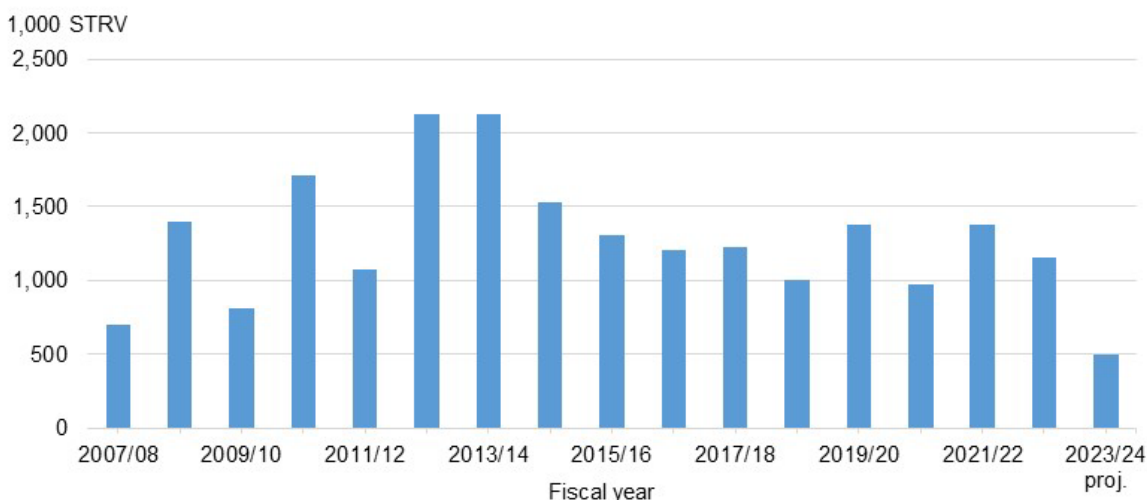
U.S. Sugar Imports from Mexico Lowered; Majority Already Imported

U.S. imports from Mexico, the largest source from a single country, have averaged about 33 percent of total imports over the last 5 years. However, due to the Mexico's historic low production, the 2023/24 U.S. sugar imports from Mexico are reduced from last month by 167,000 STRV, a 17-year low of 499,000 (figure 7) or only about 15 percent of the 2023/24 total imports. This reduced volume from reflects a 60 percent reduction (657,000 STRV) from last year's 1.156 million.

Based on the Foreign Agricultural Service (FAS) *U.S. Sugar Monthly Import and Re-Exports*, imports from Mexico through March are estimated at 355,000 STRV, indicating that 71 percent of the 499,000-STRV total has already entered in the first half of fiscal year, the fastest pace since 2018/19. Further, a 71-percent fill-rate implies that imports from Mexico would average a relatively low 24,000 STRV each month between April–September (figures 8, 9). In contrast, the share in the first half is historically smaller, about 38 percent based on 5-year average.

At 499,000 STRV, U.S. sugar imports from Mexico in the *WASDE* are about 400,000 STRV below the U.S. Department of Commerce’s (DOC) March calculation of the 2023/24 Export Limit for Mexico (898,905 STRV) (table 5). In addition, the 499,000-STRV *WASDE* estimate is about 67,000 STRV lower (13 percent) than the maximum export volume (565,505 STRV) Mexico can supply according to the Government of Mexico’s March 22 letter to the DOC.

Figure 7
U.S. sugar imports from Mexico, 2007/08–2023/24



STRV = short tons, raw value; proj. = projected.

Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)*.

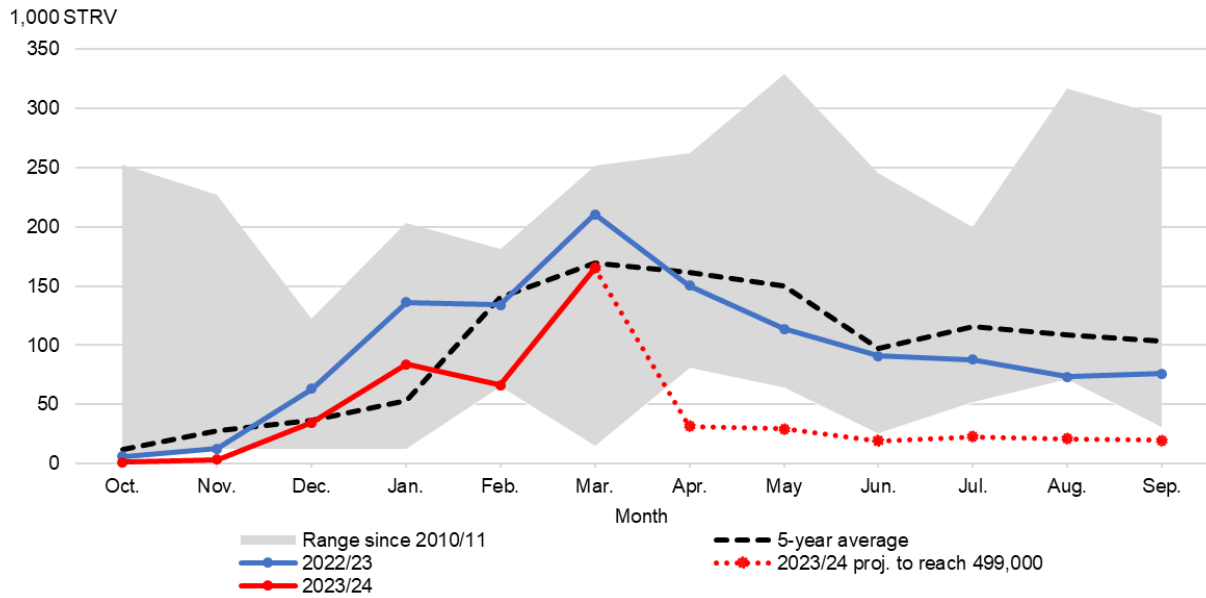
Table 5: Sugar import forecast from Mexico in the *WASDE* and U.S. Needs calculation by the U.S. Department of Commerce, 2022/23 and 2023/24

	Imports from Mexico in the <i>WASDE</i>	Target quantity of U.S. Needs	Percent to derive Export Limit	(U.S. Needs) x (percent)	Less than or equal to previous calculation	Export Limit
Unit is STRV except where percent is noted						
Fiscal year 2022/23						
July 2022	1,756,180	1,900,775	50	950,388	N/A	950,388
September 2022	1,618,775	1,618,775	70	1,133,143	No	1,133,143
December 2022	1,477,400	1,477,400	80	1,181,920	No	1,181,920
March 2023	1,305,900	1,305,900	100	1,305,900	No	1,305,900
Fiscal year 2023/24						
July 2023	1,485,900	1,485,900	50	742,950	N/A	742,950
September 2023	1,284,150	1,284,150	70	898,905	No	898,905
December 2023	971,079	1,065,550	80	852,440	Yes	898,905
March 2024	665,663	680,525	100	680,525	Yes	898,905

STRV = short tons, raw value; N/A = not applicable; *WASDE* = *World Agriculture Supply and Demand Estimates*.

Source: U.S. Department of Commerce *ACCESS* repository.

Figure 8
U.S. sugar imports from Mexico, monthly, fiscal year 2010/11–2023/24

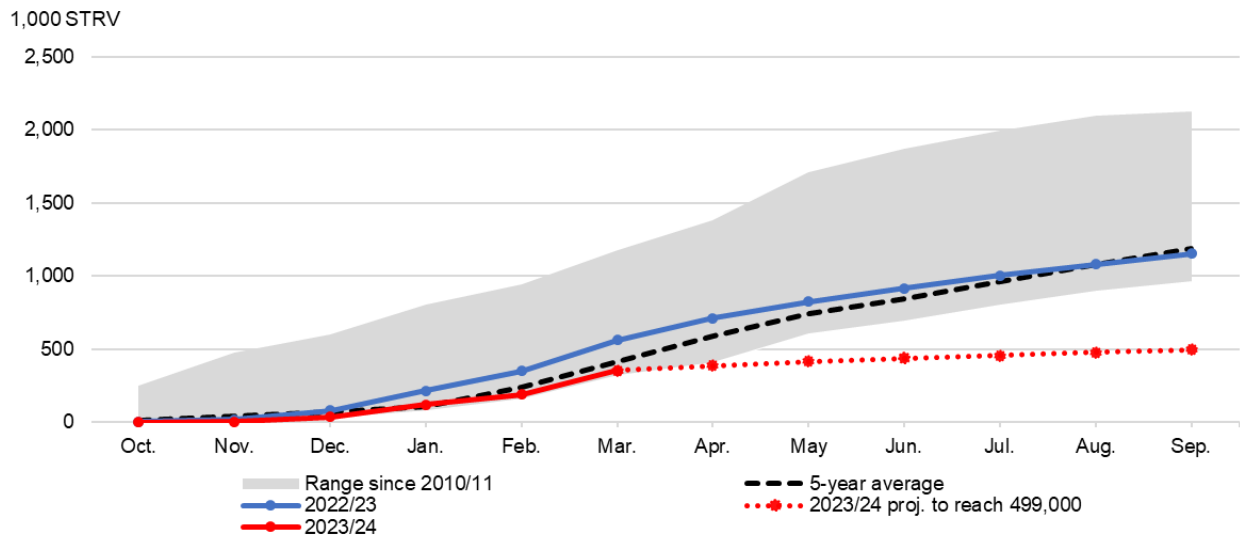


STRV = short tons, raw value.

Note: The 2023/24 projected volume for the remaining months is calculated using the 5-year monthly average percent share to the fiscal year total.

Source: USDA, Economic Research Service calculations using data from USDA, Foreign Agricultural Service.

Figure 9
U.S. sugar imports from Mexico, cumulative, fiscal year 2010/11–2023/24



STRV = short tons, raw value.

Note: A monthly average of 24,000 STRV is assumed between April to September to reach the 2023/24 forecast of 499,000 STRV.

Source: USDA, Economic Research Service calculations using data from USDA, Foreign Agricultural Service *U.S. Sugar Monthly Import and Re-Exports*.

U.S. Sugar Exports Mostly to Mexico Increased; Expected to Include Beet Sugar

U.S. exports in 2023/24 are raised from last month by 38,000 STRV to 198,000 (figure 10), a 115,000-STRV increase (140 percent) from last year's 82,000 STRV and would represent the largest in a decade.

Of this month's revised 198,000 STRV forecast, 88,000 represents the portion of U.S. re-export program sugar that is expected to be exported to Mexico following Mexico's April 5 announcement. The remaining portion of the increase (110,000 STRV) is comprised of actual U.S. exports through February (70,000 STRV) mostly to Mexico, plus an additional volume expected based on pace (40,000 STRV), the majority of which is also destined for Mexico. The monthly share of U.S. sugar exports to Mexico which averaged about 30 percent between 2018/19–2021/22, steadily increased since June 2023 and hovered close to 90 percent since November 2023 (figure 11).

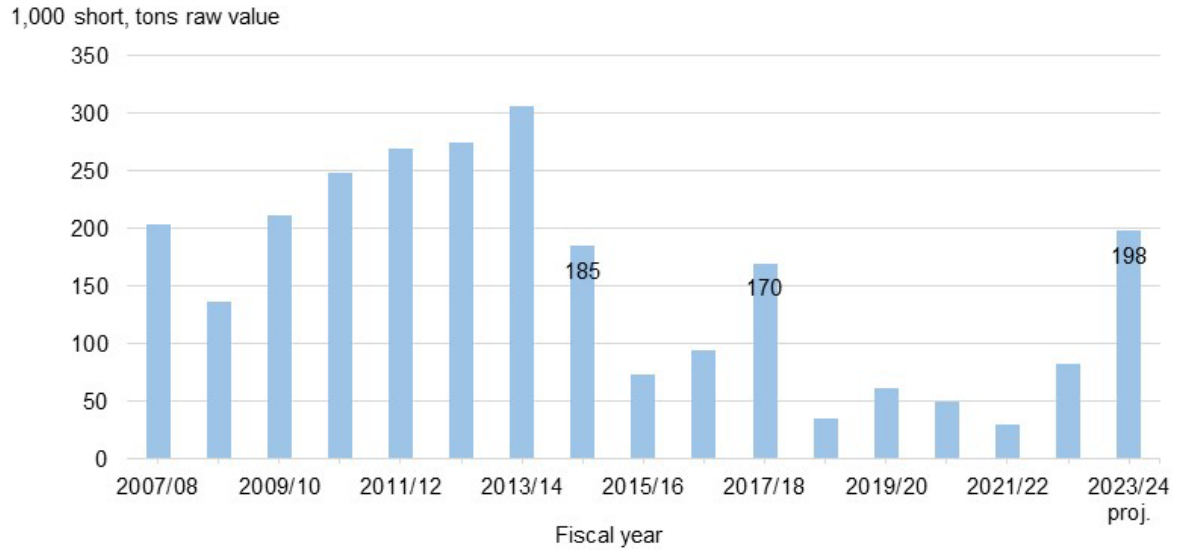
On April 5, Mexico's Secretaría de Economía published an agreement in the Diario Oficial de la Federación that temporarily allows authorized companies participating in the IMMEX program to import sugar that benefit from the United States' re-export program⁵ duty free until August 31. To qualify, sugar must be classified under the following Tariff of the General Import and Export Tax Law (TIGIE): 1701.13.01, 1701.14.91, 1701.91.04, 1701.99.99.

During the 2008–13 period of the North American Free Trade Agreement (NAFTA), a significant share of U.S. exports went to Mexico without duty or quota restrictions. At the time, most of the sugar was imported by Mexico-based manufacturers participating in IMMEX, including U.S. multinational companies. The IMMEX program provided tax incentives if the companies used imported U.S. sugar in food products that would be re-exported within a certain amount of time.

However, in January 2016, in response to the suspension agreements on sugar from Mexico in December 2014, Mexico's Secretaría de Economía published a notice that sugar imported from the United States would no longer qualify for duty-free treatment under IMMEX if that sugar was the beneficiary of the U.S. version of a re-export program. As such, U.S. exports to Mexico declined and consequently, U.S. total exports only averaged about 75,000 between fiscal year 2016/17 and 2022/23.

⁵ USDA administers three re-export programs involving sugar: Refined Sugar Re-Export Program; Sugar-Containing Products Re-Export Program; and Sugar for the Production of Polyhydric Alcohol Program.

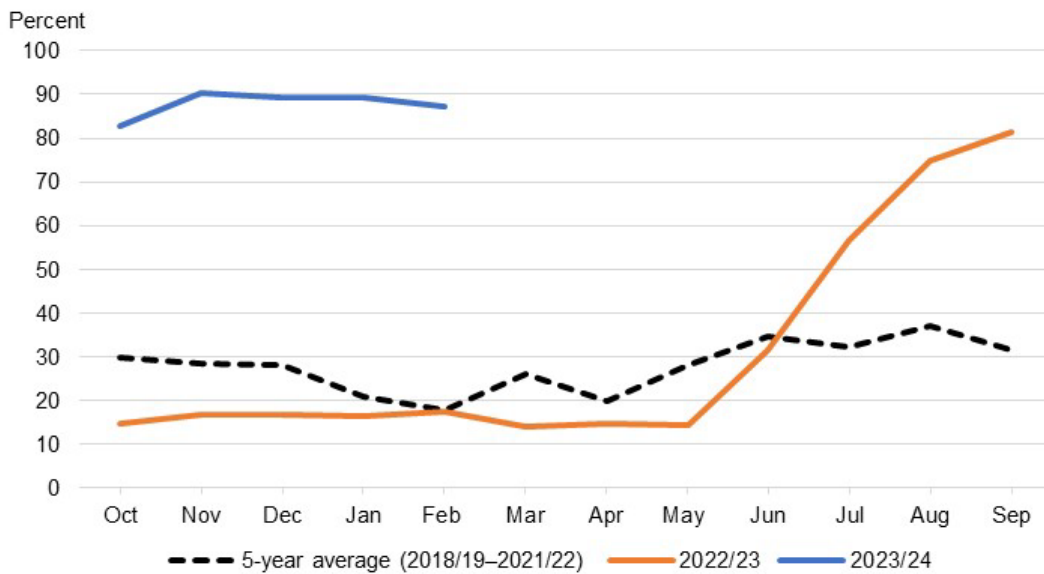
Figure 10
U.S. sugar exports, 2007/08–2023/24



proj. = projected.

Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)*.

Figure 11
Share of U.S. sugar exports to Mexico out of the total exports, monthly, by fiscal year, 2018/19–2023/24



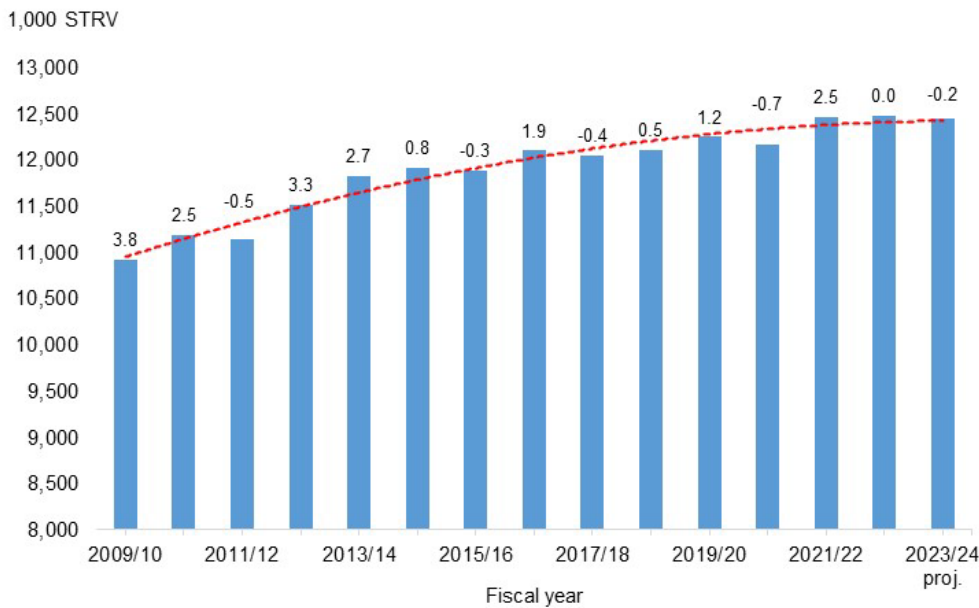
Source: USDA, Economic Research Service calculations using data from USDA, Foreign Agricultural Service, Global Agricultural Trade System (GATS).

While largely composed of cane sugar in the last decade, this year's U.S. exports are expected to include beet sugar. *Sweetener Market Data (SMD)* reported that through February, about 3,500 STRV of beet sugar was exported, about 5 percent of the 70,000 STRV total U.S. exports to date. While relatively less than the volume of beet sugar exports between fiscal year 2003/04–2012/13, which averaged about 45,000 STRV a year, the cumulative beet exports for the first 5 months is already close to matching the largest fiscal year beet sugar exports since 2013/14 (about 3,800 STRV in 2016/17).

U.S. Total Sugar Deliveries Unchanged

Sugar deliveries for food and beverage use in 2023/24 are maintained at 12.450 million. This volume reflects a 23,000-STRV reduction (0.2 percent) from last year's record high of 12.473 million, and a flattening of the trend since the 2.5-percent surge in 2021/22 post-Coronavirus (COVID-19) pandemic (figure 12). With the 105,000-STRV forecast for non-food use component likewise carried over, total deliveries are unchanged at 12.555 million STRV.

Figure 12
U.S. sugar deliveries for food and beverage use, 2009/10–2023/24



STRV = short tons, raw value; proj. = projected.

Note: The dashed red line represents the long-term trend line. Numbers on top of the bars represent the annual growth rates (percent).

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

Total deliveries of contracted sugar for food and beverage use through February are 4.961 million STRV, 200,000-STRV lower (4 percent) than the same period last year (table 6). The relatively large over-the-year decrease is mostly driven by cumulative non-reporter deliveries that were historically low in November 2023 and February 2024 (figure 13); the *SMD* reporters' component (combined beet processors and cane refiners) are only slightly down from last year (37,000 STRV or 1 percent).

Table 6: U.S. sugar deliveries for food and beverage use, October–February, by fiscal year, 2018/19–2023/24

	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	5-year average	Annual change (2023/2024 versus 2022/23)	
1,000 short tons, raw value (STRV)									
Beet sugar processors	2,005	1,993	1,979	2,144	2,073	2,024	2,039	-49	-2
Cane sugar refiners	2,578	2,617	2,558	2,531	2,684	2,696	2,594	12	0
Total reporters	4,583	4,611	4,537	4,674	4,757	4,719	4,632	-37	-1
Non-reporter (direct consumption)	323	319	283	427	404	242	351	-163	-40
Total	4,906	4,929	4,820	5,102	5,161	4,961	4,983	-200	-4
Percent share in total									
Beet sugar processors	41	40	41	42	40	41	41		
Cane sugar refiners	53	53	53	50	52	54	52		
Total reporters	93	94	94	92	92	95	93		
Non-reporter (direct consumption)	7	6	6	8	8	5	7		
Total	100	100	100	100	100	100	100		

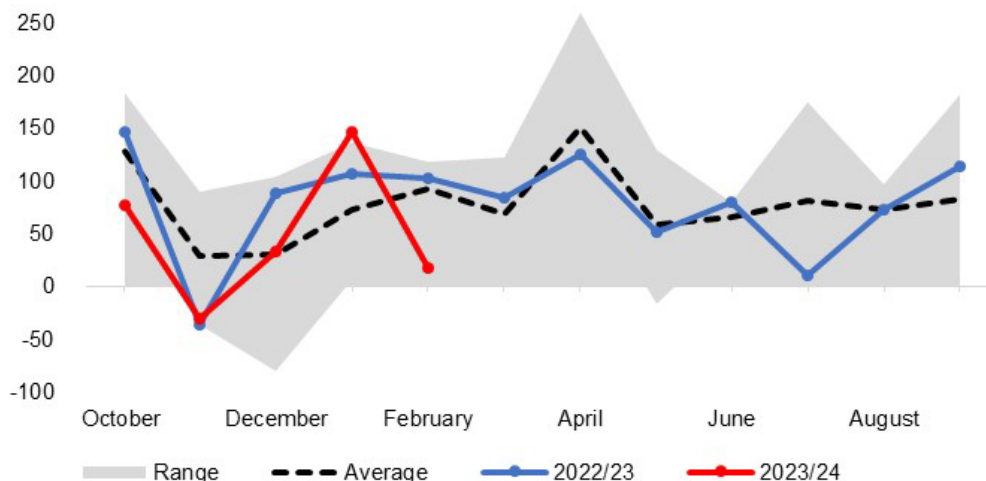
Note: Totals may not add due to rounding. "Reporters" refer to beet processors and cane refiners that report their data to the Farm Service Agency, which in turn publishes the monthly *Sweetener Market Data* (SMD).

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

Figure 13

U.S. non-reporter sugar deliveries, monthly, 2018/19–2023/24

1,000 short tons, raw value



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

Given that non-reporter deliveries are calculated from two reports (FAS' *U.S. Sugar Monthly Import and Re-Exports* and FSA's *SMD*), the monthly series tend to be volatile due to reporting timeline differences. It is likely that the February non-reporter deliveries are underreported, and an offset can occur in March. Thus, the food use delivery component was left unchanged at 4.961 million STRV.

Though cumulative refined beet sugar deliveries through February (2.024 million STRV) are 49,000-STRV lower (2 percent) than the same period last year, they have been consistently tracking the 5-year average monthly since October (figure 14). Given that refined beet sugar inventory as of February is higher than last year (figure 16), an increased pace in delivery to either domestic users and/or exports to Mexico above the 3,500 STRV can be accommodated.

Conversely, refined cane deliveries are sustaining their strong monthly pace—either surpassing or equaling the 5-year record high in 3 of the 5 months and matching the 5-year average in the other two (figure 15). Thus, through February, refined cane sugar totaled 2.696 million STRV, surpassing last year's 2.684 million STRV to be the largest volume over the same period. The strength in pace is also reflected in the corresponding uptick in cane refiners melt for the same months.

Figure 14
U.S. refined beet sugar deliveries, monthly, 2018/19–2023/24

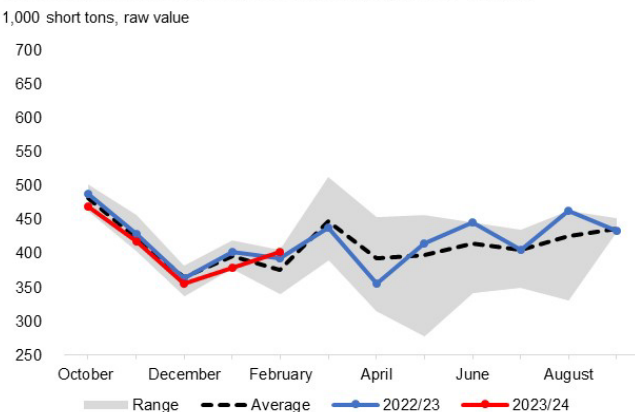


Figure 15
U.S. refined cane sugar deliveries, monthly, 2018/19–2023/24

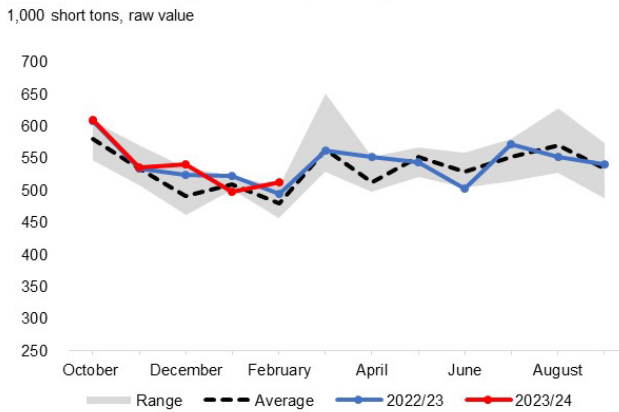
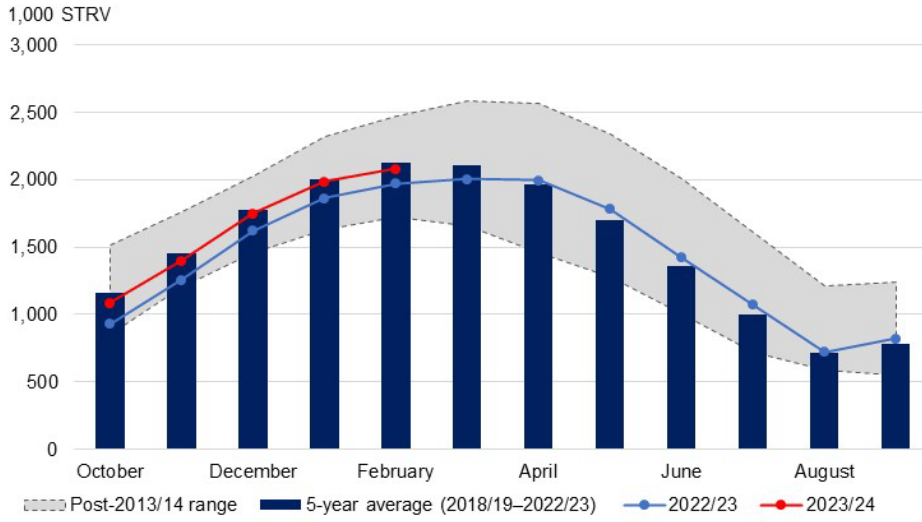


Figure 16

U.S. sugarbeet processors' total sugar inventories, monthly, 2013/14–2023/24



Note: STRV = short tons, raw value.

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

Mexico Outlook

Mexico's Sugar Production Reduced

In the April *World Agricultural Supply and Demand Estimates (WASDE)*, Mexico's 2023/24 sugar production is reduced from last month by 175,000 metric tons (MT), actual weight (4 percent) to a 25-year low of 4.572 million MT (table 7, figure 17). This year's crop has been negatively affected by unsuitable weather conditions during the growing and harvest seasons and suboptimal application of inputs (such as fertilizers) due to high costs. The 4.572 million-MT production level would be 652,000-STRV lower (12 percent) than last year (5.224 million MT) and 175,000-MT lower (4 percent) than Mexico's National Committee for the Sustainable Development of Sugarcane's (CONADESUCA) third production estimate (4.747 million MT) that was released on March 7 (table 8).

Table 7: Mexico's sugar supply and use by fiscal year (October–September), April 2024

	2022/23			2023/24		
	March (estimate)	April (estimate)	Monthly change	March (forecast)	April (forecast)	Monthly change
	1,000 metric tons, actual weight					
Beginning stocks	964	964	0	835	835	0
Production	5,224	5,224	0	4,747	4,572	-175
Imports	285	285	0	494	575	81
Imports for consumption	267	267	0	469	475	6
Imports for sugar-containing product exports (IMMEX) 1/	18	18	0	25	100	75
Total supply	6,473	6,473	0	6,077	5,982	-94
Disappearance						
Human consumption	4,193	4,193	0	4,193	4,193	0
For sugar-containing product exports (IMMEX)	405	405	0	400	425	25
Other deliveries and end-of-year statistical adjustment	29	29	0	0	0	0
Total	4,627	4,627	0	4,593	4,618	25
Exports	1,011	1,011	0	595	471	-124
Exports to the United States and Puerto Rico	989	989	0	570	427	-143
Exports to other countries 2/	22	22	0	25	44	19
Total use	5,638	5,638	0	5,188	5,089	-99
Ending stocks	835	835	0	889	894	5
Stocks-to-human consumption (percent)	19.9	19.9	0	21	21	0
Stocks-to-use (percent)	14.8	14.8	0	17.1	17.6	0
High-fructose corn syrup (HFCS) consumption (dry weight)	1,392	1,392	0	1,407	1,407	0

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

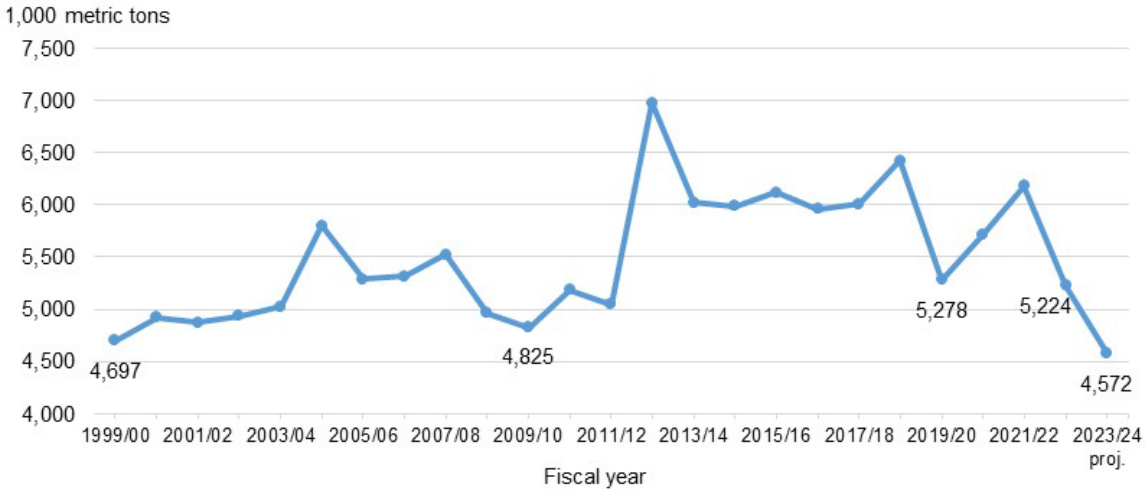
1/ IMMEX = Industria Manufacturera, Maquiladora y de Servicios de Exportación.

2/ Includes exports participating in the U.S. re-export programs.

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

Figure 17

Mexico's sugar production, by fiscal year, 1999/00–2023/24



proj. = projected.

Source: USDA, World Agricultural Outlook Board; Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

The forecast is based on CONADESUCA's production data as of week 26 (through March 30). The interim analysis prompted an increase to last month's forecast for sugarcane yield (from 61.89 MT per hectare to 62.25) and sucrose recovery (from 9.97 percent to 10.10 percent). However, harvested area was lowered from last month's 769,741 hectares to 727,116, a 12-year low and a 79,000-hectare reduction from last year's record high of 806,000 hectares (figure 18).

The downward adjustment in area was based on CONADESUCA's reporting that the actual cumulative area harvested through week 26 is 20,681-hectares lower (8 percent) than the corresponding third production estimate over the same period. Thus, 20,681-hectare variation was subtracted from CONADESUCA's third estimate of (747,797 hectares) to arrive at the WASDE forecast (727,116 hectares).

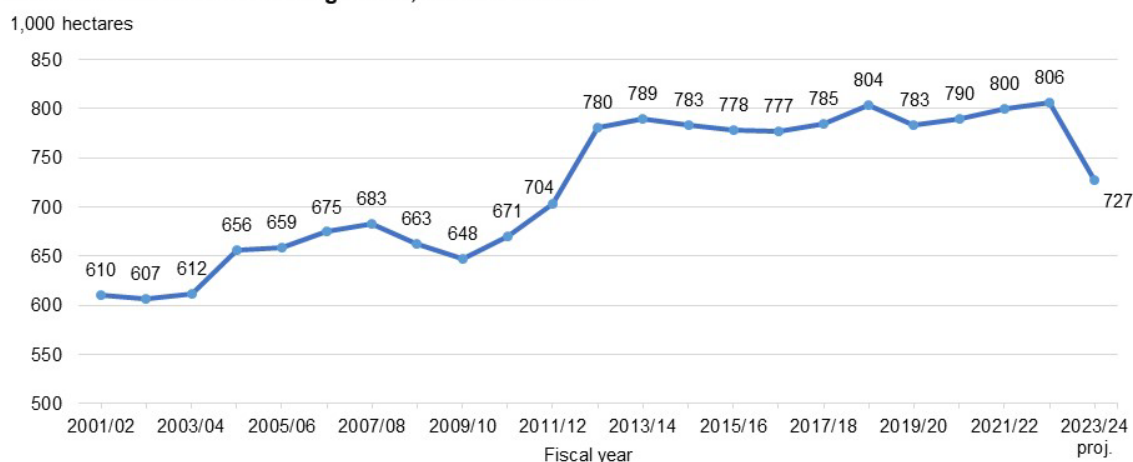
Table 8: Mexico's sugar production, 2017/18–2023/24

Fiscal year	Harvested area (1,000 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	785	67.97	53,336	11.27	7.66	6,010
2018/19	804	70.94	57,037	11.27	7.99	6,426
2019/20	783	62.89	49,274	10.71	6.74	5,278
2020/21	790	64.93	51,293	11.14	7.23	5,715
2021/22	800	68.37	54,681	11.31	7.73	6,185
2022/23	806	58.99	47,564	10.98	6.48	5,224
5-year average (2018/19–2022/23)	797	65.22	51,970	11.08	7.24	5,766
2023/24 proj. WASDE (04/11/2024)	727	62.25	45,263	10.10	6.29	4,572
2023/24 proj. CONADESUCA (03/07/2024)	748	61.56	46,033	10.31	6.35	4,747
Difference	-21	0.69	-770	-0.21	-0.06	-175

ha = hectares; MT = metric tons; proj. = projected.

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

Figure 18

Mexico's area harvested for sugarcane, 2001/02–2023/24

proj. = projected.

Source: USDA, World Agricultural Outlook Board; Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

After the WASDE, CONADESUCA released week 27 data (through April 6), which indicate that the cumulative difference has expanded from 20,681 hectares to 25,553. In other words, actual harvested area (539,020 hectares) as of April 6 were 25,553 hectares lower than the corresponding CONADESUCA estimate for this week (564,573 hectares). One possible explanation for the increasing deviation from the CONADESUCA estimate is that the unfavorable weather patterns (excessive drought during the growing season and/or moisture during harvest campaign) made it uneconomical for the growers to cut and deliver the sugarcane due to low sugarcane yield and/or for the mills to process due to low recoverable sugar. Instead, growers may find it more practical to leave the fields unharvested to recover for next year's campaign.

Through week 27, all the production variables, except for sugarcane yield (up 4 percent), continue to lag last year's levels: area harvested by 9 percent, extraction rate by 8 percent lower, and the agro-industrial yield by 4 percent (table 9). Consequently, total sugar production year over year is lower by 13 percent; production across all the sugar types also continues to track lower.

Table 9: Mexico's sugar production as of week 27, fiscal years 2022/23, 2023/24, and 5-year average

	As of week 27			Difference versus 2022/23		Difference versus 5-year average	
	2022/23	2023/24	5-year average ^{1/}	Level	Percent	Level	Percent
Area harvested (1,000 ha)	591	539	562	-52	-9	-23	-4
Sugarcane processed (1,000 MT)	37,731	35,746	39,252	-1,985	-5	-3,506	-9
Sugarcane yield (MT per ha)	63.81	66.32	70.02	2.5	4	-3.70	-5
Extraction rate (percent)	10.86	10.01	10.89	-0.9	-8	-0.88	-8
Agro-industrial yield (MT sugar per ha)	6.93	6.64	7.63	-0.3	-4	-0.99	-13
Sugar production (1,000 metric tons)	4,097	3,577	4,279	-520	-13	-702	-16
By type:							
Refinada	877	832	969	-45	-5	-137	-14
Estándar	2,578	2,427	2,611	-151	-6	-184	-7
Polarity less than 99.2	584	268	561	-316	-54	-293	-52
Blanco especial and mascabado	58	51	138	-7	-12	-87	-63

ha = hectares; MT = metric tons.

^{1/} Years included are 2018/19–2022/23.

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

Record-Low Forecast of Low Polarity Sugar Production; Exports to United States Correspondingly Reduced

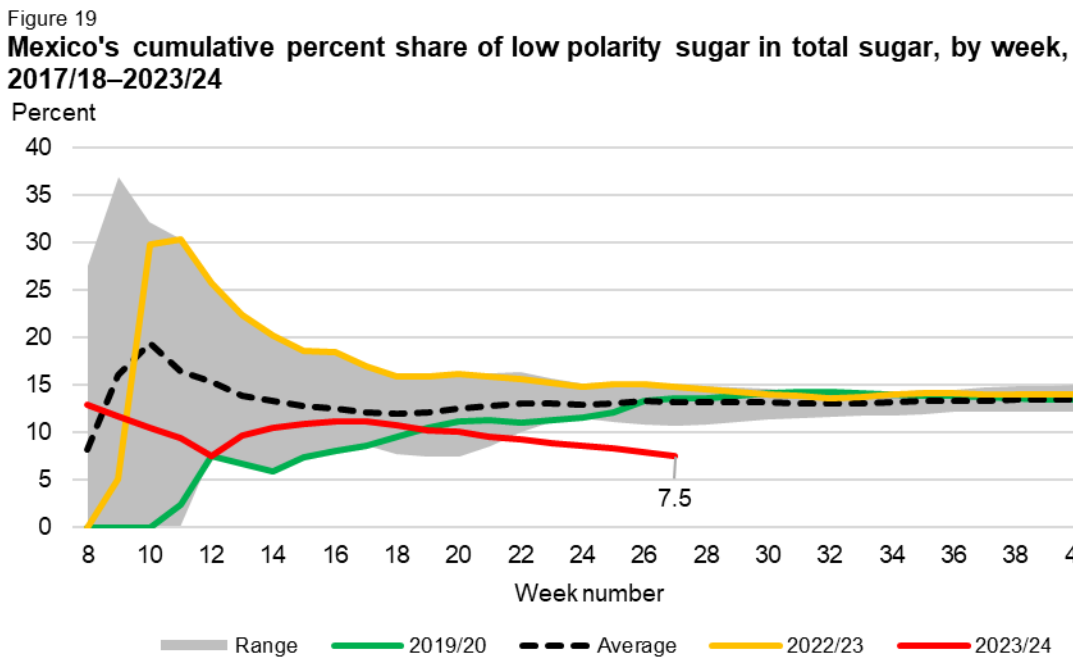
Based on CONADESUCA's data through week 26, the production share forecast for sugar with less than 99.2 polarity (referred to as low polarity sugar, all of which are expected to be exported to the United States) is lowered from last month's 9 percent to 7 percent. Multiplying the 7 percent share by the *WASDE* Mexico sugar production forecast of 4.572 million results in a 320,000-MT forecast of 2023/24 low polarity sugar production, the lowest since 2017/18.

Week 27 data corroborates the *WASDE* forecast as cumulative production of low polarity sugar, amounted to 268,000 MT, which is 316,000 MT lower (54 percent) than last year over the same period. This translates to a record low 7.5-percent share of total sugar produced to date. The cumulative share of low polarity sugar production out of the total has been declining relative to prior years' shares, which historically tend to stabilize around week 20 (figure 19). This is

supported by the weekly trends that show low polarity sugar production is coming to an end at a faster rate than prior years (figure 20).

If the 2023/24 forecast for low polarity sugar production of 320,000-MT is realized, then about 52,000 MT are still left to be produced in the succeeding weeks (i.e., 320,000 MT total less 268,000 MT to date). Given the poor sugarcane crop outlook and historically high Mexico sugar prices, the production of standard and refined sugar for the domestic market is taking precedence over low polarity for exports to the United States. Across the five regions⁶ where low polarity sugar production has been produced since 2017/18 to comply with the terms of the amended suspension agreements, cumulative production of low polarity sugar is relatively behind that of standard sugar (figure 21).

All of Mexico's low polarity sugar production is expected to be exported to the United States and estimated to comprise 75 percent of the total, the same share as last year. Thus, Mexico's total exports to the U.S. in 2023/24 are calculated to be 427,000 MT (i.e., 320,000 MT divided by 0.75), a reduction of 143,000 MT from last month's 570,000 MT and the lowest in 17 years (figure 22).



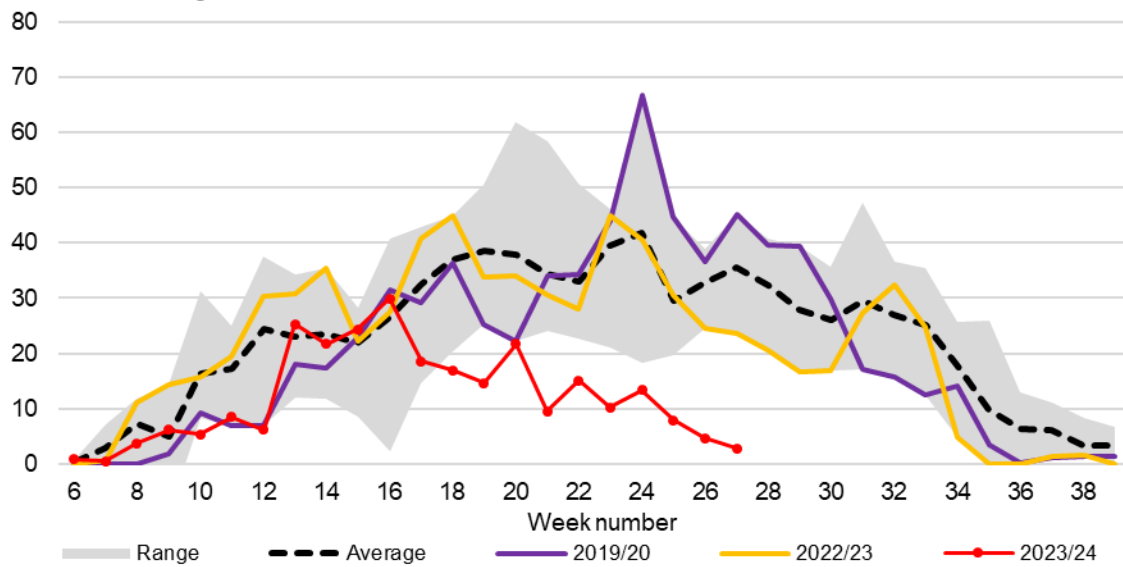
Source: USDA, Economic Research Service calculations using data from Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

⁶ Mills in the Center and Pacific regions do not produce low polarity sugar. Prior to the suspension agreements, low polarity sugar was not produced in Mexico.

Figure 20

Mexico's weekly production of low polarity sugar, 2017/18–2023/24

1,000 MT, actual weight



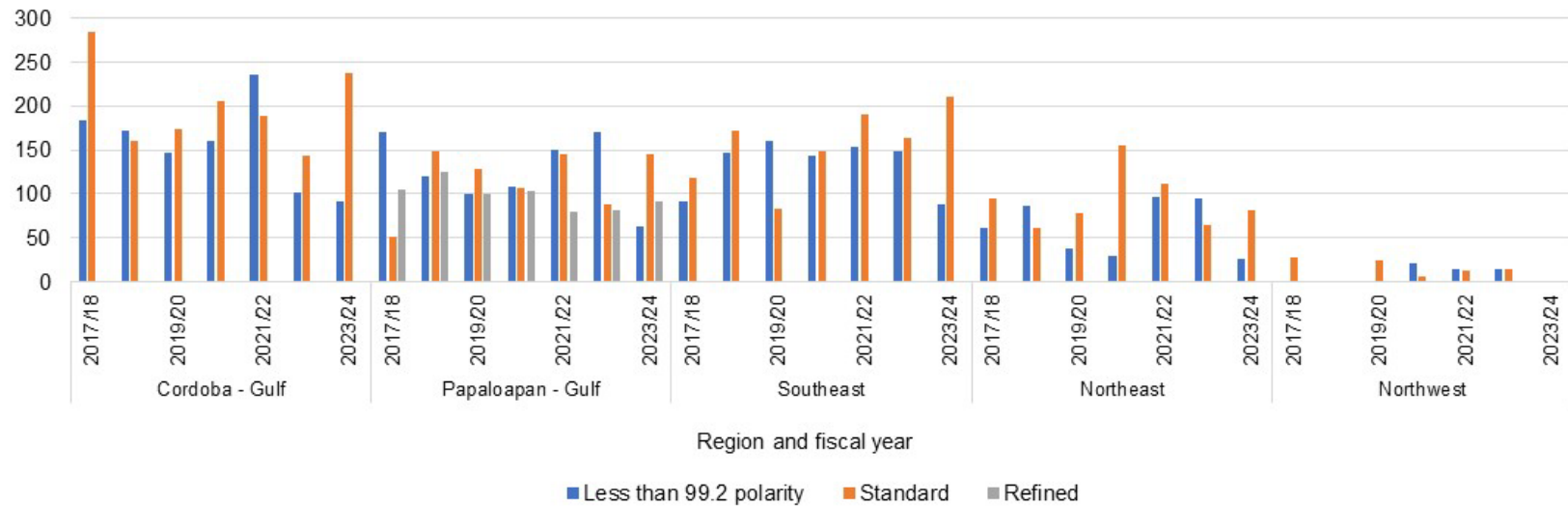
MT = metric tons.

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

Figure 21

Mexico mills' cumulative production of low polarity sugar with respect to other types, as of week 27, by region, 2017/18–2023/24

1,000 metric tons

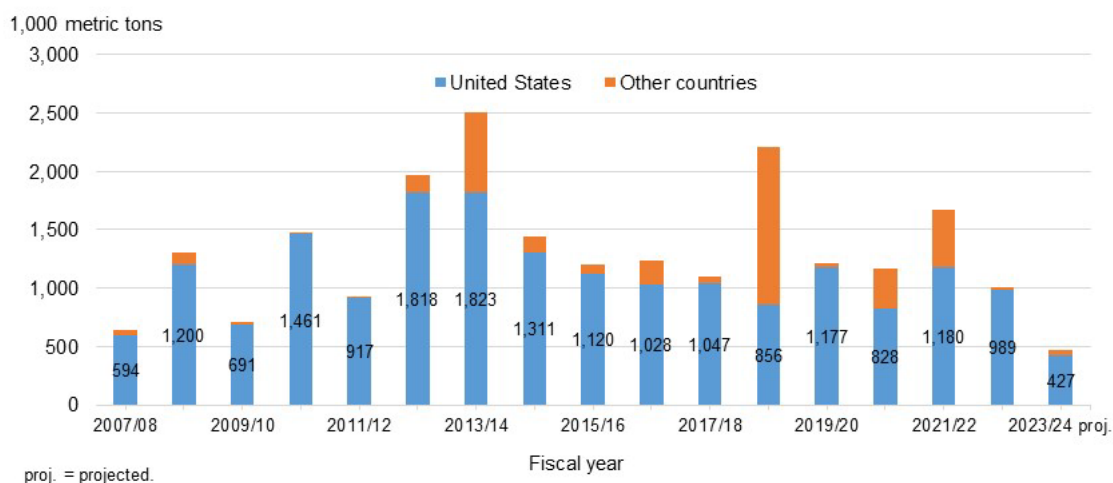


Source: USDA, Economic Research Service calculations using data from Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Mexico's Sugar Exports to Other Countries Residually Increased

Mexico's exports to other countries in 2023/24 are residually projected at 44,000 MT, reflecting a 19,000-MT increase from last month; however, it is lower than CONADESUCA's estimate of 131,357 MT in its third *National Sugar Balance* published on April 4. Most likely, CONADESUCA has residually calculated its 131,357-MT exports to maintain the maximum target for 2.5-months' worth of ending stocks. Between October 2023 to February 2024, CONADESUCA reported minimal export volume to other countries relative to last year. This variable will be closely monitored since the historic high Mexico prices for both standard and refined sugar relative to the world market (figure 23) can potentially disincentivize exports to other countries.

Figure 22
Mexico's sugar exports by destination, 2007/08–2023/24



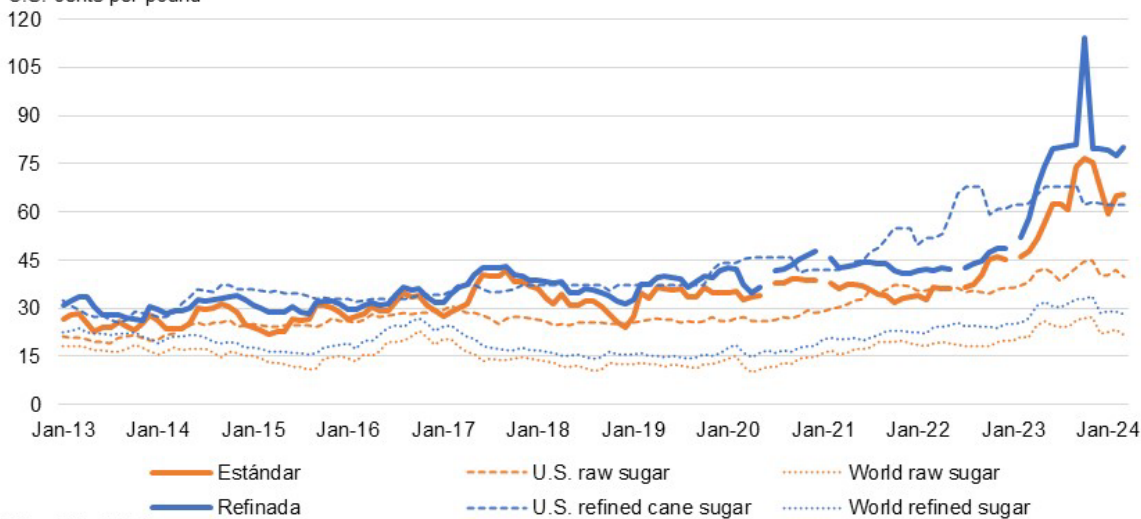
proj. = projected.

Source: USDA, World Agricultural Outlook Board; Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 23

U.S., Mexico, and world sugar prices, monthly, January 2013–March 2024

U.S. cents per pound



U.S. = United States.

Note: The breaks in the Mexican sugar price series on June 2020 and January 2021 are due to data unavailability.

Source: USDA, Economic Research Service calculations using data from Intercontinental Exchange, Inc. (U.S. prices), Servicio Nacional de Información e Integración de Mercados (Mexican prices), and U.S. Federal Reserve Bank (exchange rates).

Mexico’s Sugar Imports Raised to Meet Deliveries for IMMEX Program and Domestic Consumption

The combined increases in Mexico’s imports for the 2 components—IMMEX (up 75,000 MT) and domestic consumption (up 6,000 MT)—raise 2023/24 Mexico’s total imports from last month by 81,000 MT to 575,000—more than double of last year’s (285,000 MT) and the largest in 14 years (figure 24).

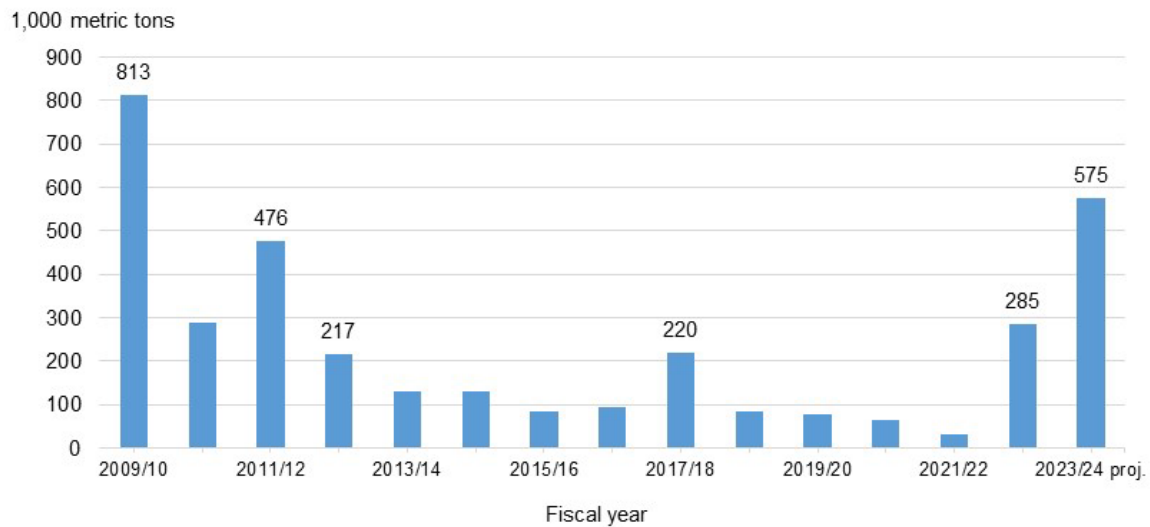
Given the reduced crop, CONADESUCA lowered its 2023/24 estimate of domestic sugar deliveries earmarked for IMMEX by 50,000 MT (i.e., 350,000 MT in the second estimate to 300,000 MT in the third estimate). Mexico’s Secretaría de Economía announced on April 5 that sugar imports benefitting from USDA re-export programs would be temporarily allowed duty-free until August 31 to fulfill IMMEX requirements. In anticipation, the *WASDE* raised the 2023/24 U.S. re-export program imports on the U.S. balance sheet from last month by 75,000 MT (equivalent to 88,000 STRV), which then correspondingly increased Mexico’s 2023/24 sugar imports for IMMEX purposes from last month by the same 75,000-MT magnitude to 100,000 MT.

With 25,000-MT more of net sugar available for IMMEX (i.e., 75,000 MT from increased imports less 50,000 MT from reduced domestic deliveries), the *WASDE* 2023/24 forecast of sugar delivered for IMMEX is raised from last month’s 400,000 MT to 425,000 MT.

Conversely, the import component for domestic consumption is raised from last month by 6,000 MT to 475,000, 208,000-MT higher (78 percent) than last year's 267,000 MT. Per CONADESUCA's report, Mexico's actual sugar imports for domestic consumption through March 31 already totaled 435,000 MT. Considering the imports to date and updated data from Trade Data Monitor (TDM) over the same period, USDA expects an additional 40,000-MT of imports for the rest of the fiscal year, bringing the total import component for domestic consumption to 475,000 MT.

Per TDM, Brazil is the top origin, supplying about 54 percent, followed by the United States (21 percent), Guatemala (10 percent), and Saudi Arabia (7 percent) (table 10).

Figure 24
Mexico's total sugar imports, by fiscal year, 2009/10–2023/24



proj. = projected.

Source: USDA, World Agricultural Outlook Board; Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Table 10: Cumulative countries' reported sugar exports to Mexico, October 2023–March 2024, as of April 10, 2024

Origin	Quantity (metric tons)	Share in total (percent)
Brazil	237,824	54
China	4	0
Colombia	122	0
Ecuador	0	0
El Salvador	12,858	3
EU 27 (Brexit)	4,325	1
Guatemala	44,266	10
Honduras	3,870	1
India	1,656	0
Morocco	6,408	1
Nicaragua	4,620	1
Paraguay	47	0
Saudi Arabia	32,410	7
South Korea	0	0
Taiwan	1	0
Thailand	2,000	0
United States	91,299	21
Total	441,709	100

EU = European Union.

Note: Brexit refers to the to the United Kingdom's decision in a June 23, 2016 referendum to leave the European Union.

Source: USDA, Economic Research Service calculations using data from Trade Data Monitor.

Mexico Sugar Deliveries for Domestic Consumption Unchanged; Strong Pace of HFCS Imports Likely Augmenting Supply

The forecast for Mexico's 2023/24 sugar deliveries for domestic consumption is maintained at 4.193 million MT, the same as last year (figure 25); however, this is 52,000-MT lower (1 percent) than CONADESUCA's third estimate of 4.245 million MT.

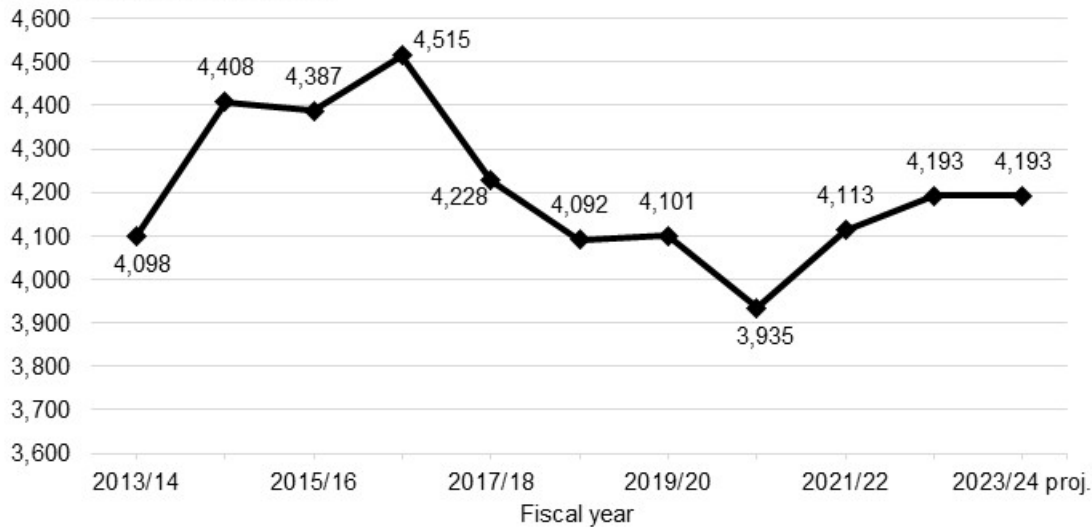
Monthly sugar deliveries have been relatively close to the 5-year average until the last 2 months, when deliveries were significantly higher-than-expected (figure 26). Thus, cumulative sugar deliveries totaled 1.854 million MT, the largest in 8 years over the same period (figure 27). In addition, the pace in the first 5 months (1.854 million MT) was stronger than 2021/22 and 2022/23, which reflected 2 consecutive years of growth in deliveries. A continued strength in domestic delivery pace can prompt more sugar imports amid the supply tightness.

Given the tight supply and high price of sugar in Mexico, high-fructose corn syrup (HFCS) can be a practical alternative for food and beverage manufacturers. The 2023/24 HFCS consumption in the *WASDE* is forecast at 1.407 million MT (dry basis), reflecting a 1-percent increase from last year's 1.392 million and about 50,000 MT larger (4 percent) than CONADESUCA's 1.357 million MT. USDA's projection is supported by the strong pace of HFCS imports indicating that 4 of the 5 months surpassed the 5-year average (figure 28). Thus, cumulative HFCS imports through February, which totaled 380,000 MT, are up 36,000 MT (10 percent) from last year and the largest since 2017/18 (figure 29). The increased pace in Mexico's imports of HFCS, the majority of which are sourced from the United States, may potentially regulate the flow of additional sugar imports.

Figure 25

Mexico's sugar deliveries for domestic consumption, 2013/14–2023/24

1,000 metric tons, actual weight



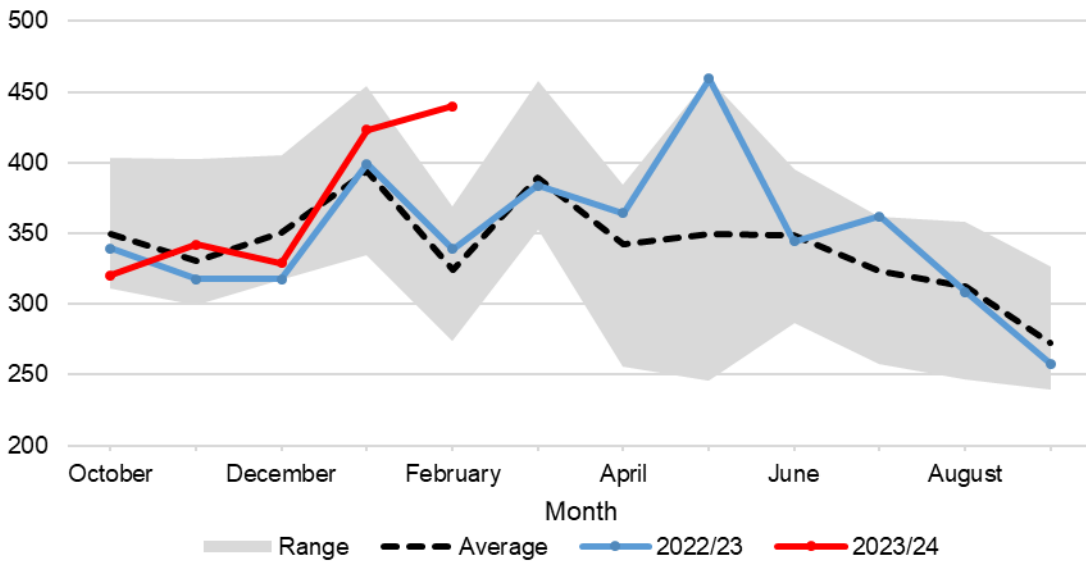
Note: The 2023/24 proj. = 4.193 million MT is *WASDE* forecast.

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

Figure 26

Mexico's sugar deliveries for domestic consumption, monthly, 2017/18–2023/24

1,000 metric tons, actual weight

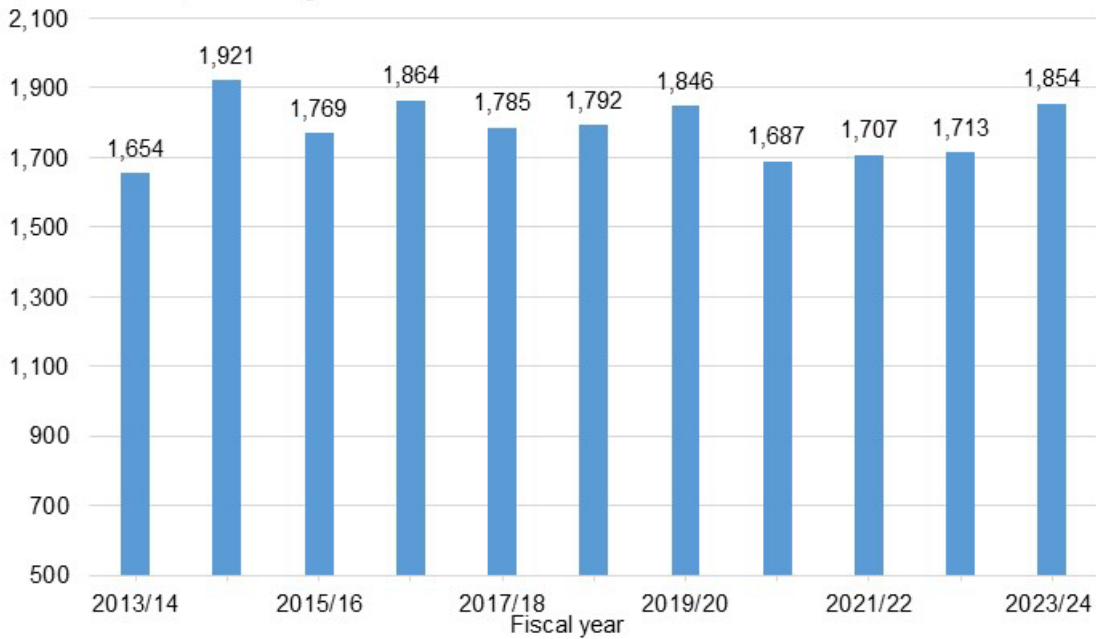


Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 27

Mexico's cumulative sugar deliveries for domestic consumption, October–February, 2013/14–2023/24

1,000 metric tons, actual weight

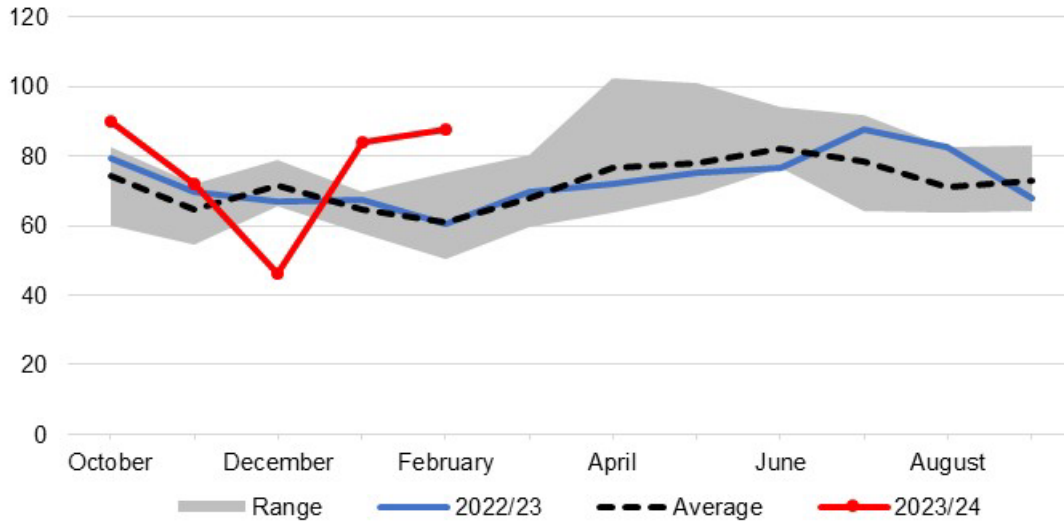


Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 28

Mexico's high-fructose corn syrup imports, monthly, 2018/19–2023/24

1,000 metric tons, actual weight

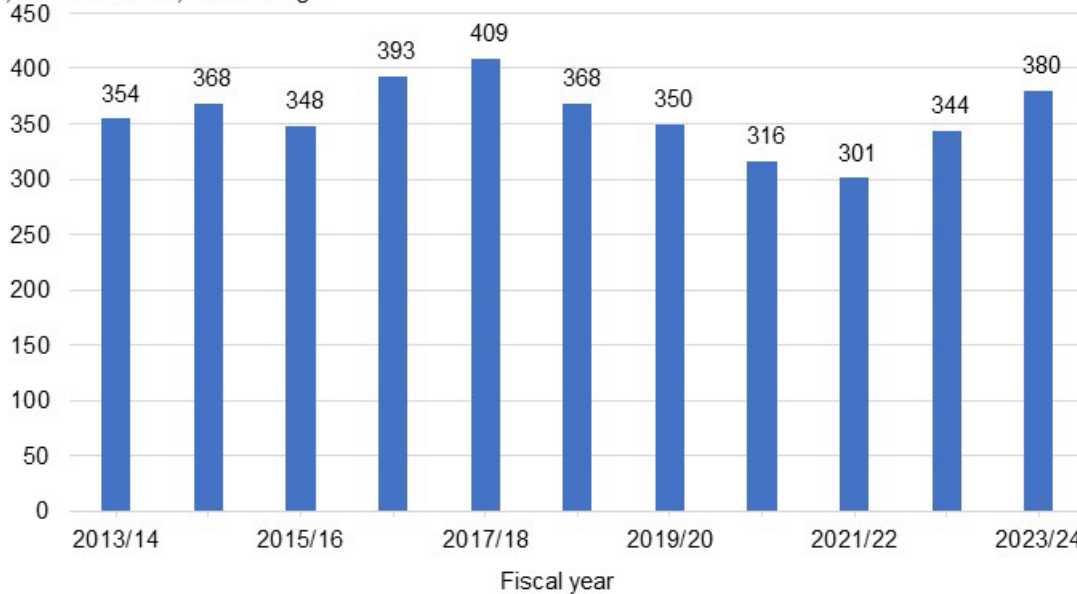


Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

Figure 29

Mexico's cumulative high-fructose corn syrup imports, October–February, 2013/14–2023/24

1,000 metric tons, actual weight



Source: Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

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