



Sugar and Sweeteners Outlook: April 2025

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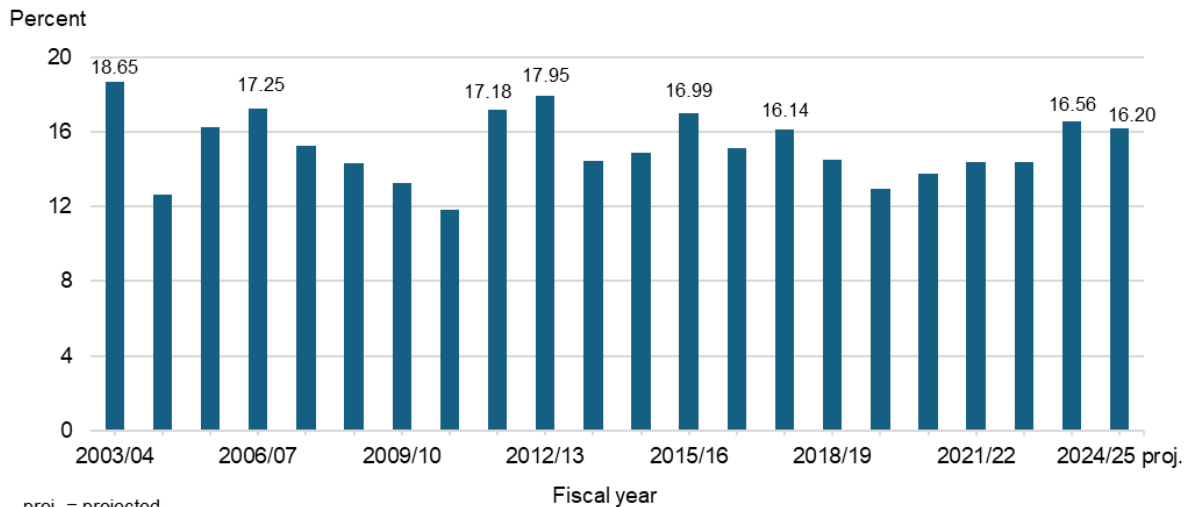
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U.S. 2024/25 Sugar Supply Is Raised; Mexico's 2024/25 Sugar Balance Is Unchanged

In the April *World Agricultural Supply and Demand Estimates (WASDE)* report, the U.S. 2024/25 sugar supply is raised from last month by 144,000 short tons, raw value (STRV) to 14.461 million, as the decrease in domestic sugar production is more than offset by the increases in high-tier imports and beginning stocks. With sugar use unchanged at 12.445 million STRV, ending stocks are raised by the magnitude of the supply increase to 2.016 million STRV. The corresponding ending stocks-to-use ratio is 16.2 percent, up 1.2 percentage points and the second highest since 2015/16. Mexico's 2024/25 sugar balance is unchanged.

Figure 1
U.S. sugar ending stocks-to-use ratio, fiscal years 2003/04–2024/25



proj. = projected.

Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)*; USDA, Farm Service Agency *Sweetener Market Data* report.

U.S. Sugar Outlook

U.S. 2024/25 Sugar Production is Lowered

Domestic sugar production in 2024/25 is lowered from last month by 39,000 STRV to 9.369 million, as the increase in beet sugar production is more than offset by the decrease in cane sugar production (table 1, figure 2). Despite the downward adjustment, the 2024/25 domestic sugar output would be a record, surpassing last year's 9.313 million STRV.

U.S. beet sugar production is increased slightly by 2,000 STRV to a record 5.391 million. Sucrose recovery is increased from 15.349 percent to 15.415 percent, based on statistical analysis of data through February, but was offset by an increased estimate of beet-pile shrink and reduced sugar production expected from molasses that processors submitted to the USDA, Farm Service Agency, *Sweetener Market Data (SMD)* report.

USDA, National Agricultural Statistics Service (NASS) released its *Prospective Plantings* report on March 31, which indicated that sugarbeet growers intend to plant 1.132 million acres for the upcoming 2025/26 crop year. This planting implies a 2.5-percent increase from the 2024/25 area planted. Beet processors determine planted area mainly based on optimizing sugarbeet slicing capacity for the upcoming campaign.

Florida's cane sugar production is lowered by 41,000 STRV to 1.930 million, based on lower yield forecasts submitted by the processors in the *SMD*. With the conclusion of Louisiana's sugar production campaign in January, Louisiana's output is unchanged at a record 2.049 million STRV, implying larger production than Florida for 3 of the last 4 years. Total cane sugar production is therefore reduced by 41,000 STRV to 3.978 million STRV, down 163,000 STRV from last year.

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

	2022/23	2023/24	2024/25	2024/25	Monthly change
	Final	Final	March (forecast)	April (forecast)	
Beginning stocks	1,820	1,843	2,129	2,131	2
Total production	9,250	9,313	9,408	9,369	-39
Beet sugar	5,187	5,172	5,389	5,391	2
Cane sugar	4,063	4,141	4,019	3,978	-41
Florida	1,985	2,079	1,971	1,930	-41
Louisiana	2,001	2,022	2,049	2,049	0
Texas 1/	76	40	0	0	0
Total imports	3,614	3,840	2,779	2,961	181
Tariff-rate quota imports	1,862	1,788	1,533	1,533	0
Other program imports	141	300	200	200	0
Non-program imports	1,611	1,752	1,047	1,228	181
Mexico	1,156	521	497	497	0
High-tier tariff/other	455	1,231	550	731	181
High-tier tariff	455	1,176	495	677	181
Raw sugar	N/A	887	174	262	88
Refined sugar	N/A	289	322	415	93
Other 2/	N/A	55	55	55	0
Total supply	14,685	14,995	14,317	14,461	144
Total exports	82	249	100	100	0
Miscellaneous	171	81	0	0	0
Total deliveries	12,589	12,534	12,345	12,345	0
Domestic food and beverage	12,473	12,428	12,240	12,240	0
Sugar-containing products re-export program	94	83	80	80	0
Polyhydric alcohol, feed, other alcohol	22	23	25	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0
Total use	12,843	12,864	12,445	12,445	0
Ending stocks	1,843	2,131	1,872	2,016	144
Private	1,843	2,131	1,872	2,016	144
Commodity Credit Corporation	0	0	0	0	0
Stocks-to-use ratio (percent)	14.3	16.6	15.0	16.2	1.2

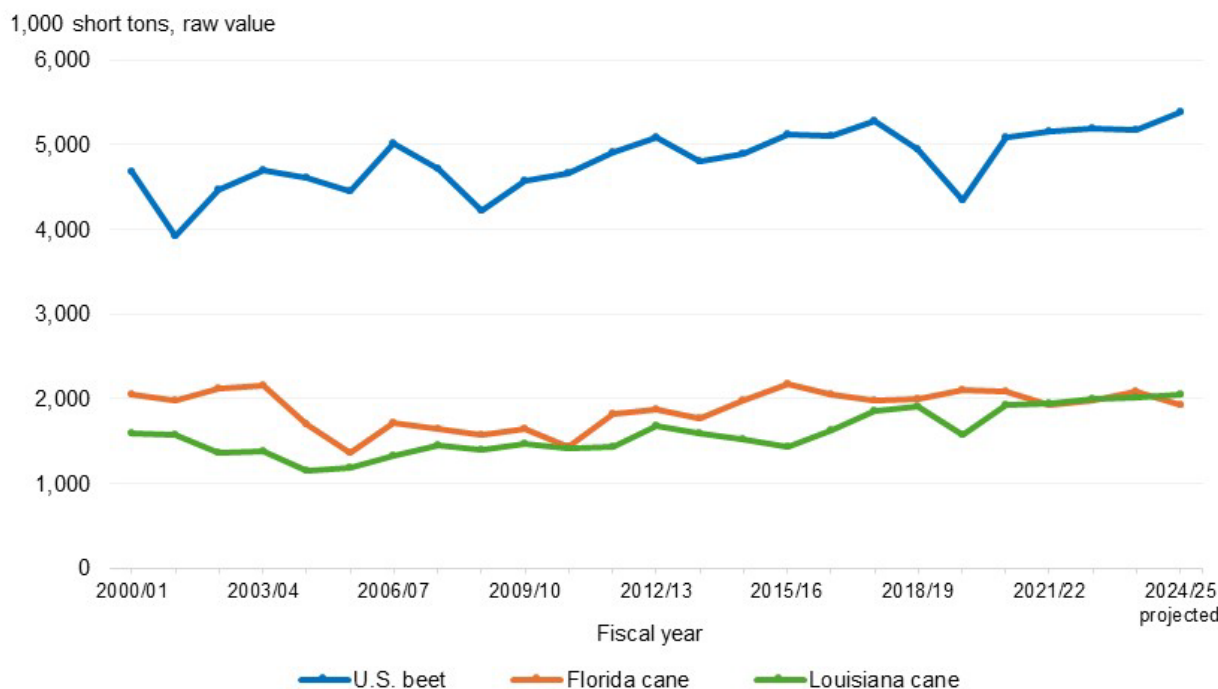
Note: Totals and monthly changes may not add due to rounding.

1/ The last cane processor in Texas closed in 2023/24. 2/ The "Other" line represents the raw sugar equivalent of imported cane molasses, which was added in the *World Agricultural Supply and Demand Estimates (WASDE)* report starting in fiscal year 2023/24.

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

Figure 2

U.S. production of beet and cane sugar, fiscal years 2000/01–2024/25



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

U.S. 2024/25 Imports Are Raised on Larger High-tier Duty Sugar

The 2024/25 U.S. total sugar imports are raised from last month by 181,000 STRV to 2.961 million (figure 3), solely on an 181,000-STRV upward adjustment to high-tier sugar imports¹, which are now estimated at 677,000 STRV. Thus, while high-tier sugar was traditionally the smallest U.S. import category and was mostly comprised of high-value, refined sugar that is difficult to source domestically, this category has overtaken Mexico as the second largest source behind the raw sugar World Trade Organization (WTO) tariff-rate quota (TRQ) for 2 consecutive years.

Despite this month’s increase, the total U.S. sugar imports of 2.961 million STRV would remain the lowest since 2007/08 and almost 1 million tons lower than last year. This decrease is because imports, particularly of raw sugar, are down from last year. The raw sugar component of high-tier imports has the largest year-over-year reduction (down 625,000 STRV), followed by raw sugar WTO TRQ (down 258,000 STRV).

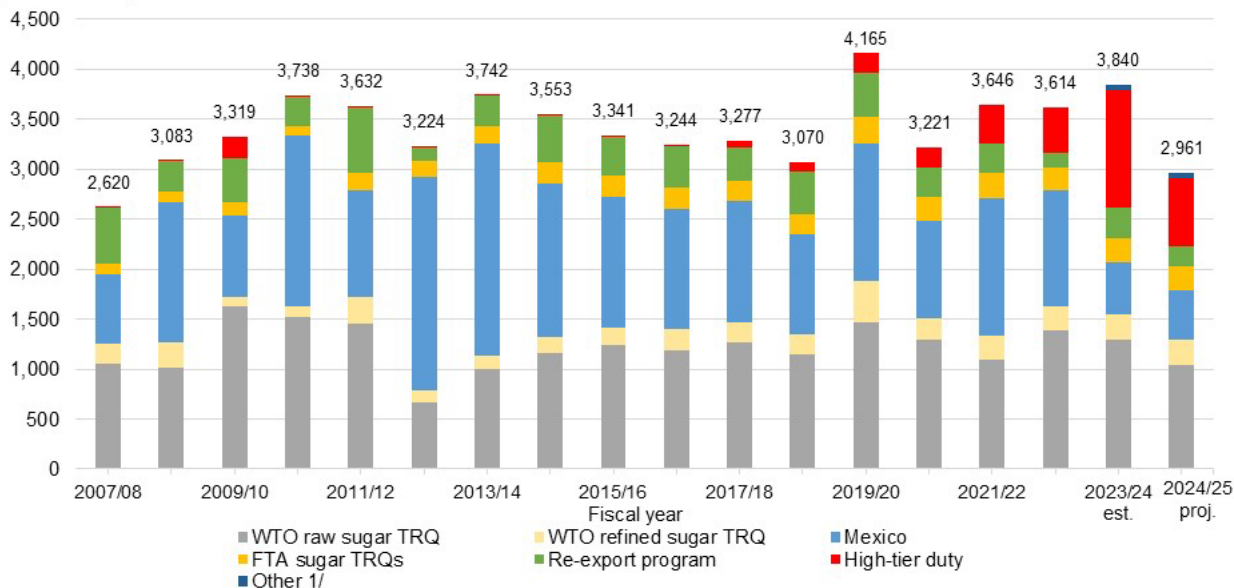
¹ High-tier-duty sugar imports are unrestricted and can be entered into the United States at unlimited volumes upon payment of duty, which is 15.36 cents per pound for raw sugar and 16.21 cents per pound for refined sugar.

In the last 3 years, more high-tier sugar imports arrived in the United States during the first half of the fiscal year compared with sugar imports from Mexico (figure 4), partly because Mexico's sugarcane harvest campaign is just starting and exports to the United States are governed by shipping patterns². While there are several factors to consider regarding the substitutability of sugar imports between these two sources³, the increased pace of high-tier imports has reduced Mexico's market share.

Figure 3

U.S. sugar imports by type, fiscal years 2007/08–2024/25

1,000 short tons, raw value



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

Note: 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.

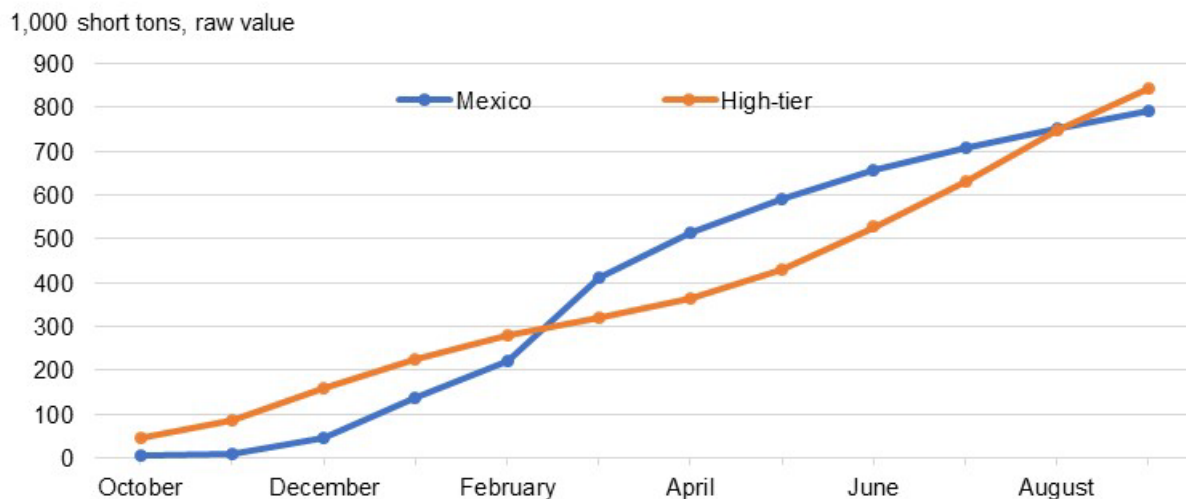
Source: USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)* report; USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

² For further details, refer to the original suspension of countervailing duty investigation published in the Federal Register (Volume 79, Number 148) on December 29, 2014, and to the amended version (Volume 82, Number 131) published on July 11, 2017.

³ Substitutability between high-tier sugar imports and imports from Mexico hinges on several factors. One factor is the quality of raw sugar, that is, the cut-off for raw high-tier sugar is less than 99.5 polarity, while raw sugar imports from Mexico must be below 99.2 polarity. Thus, if the price margins are minimal, importers may prefer the higher quality raw high-tier sugar because of efficiency gains and cost savings in the factory. Additionally, the volume of sugar exports to the United States between October and March is limited by shipping patterns per the suspension agreements. For Mexico's refined sugar exports, this limitation for the first 6 months of the fiscal year is more pronounced, since the fiscal year refined sugar exports from Mexico to the United States must not account for more than 30 percent of the total.

Figure 4

U.S. cumulative imports of sugar from Mexico and of high-tier sugar using monthly averages in the last 3 years (2022/23–2024/25)



Note: The monthly average for October–February is calculated using data from 2022/23–2024/25. Since the 2024/25 data are not yet available for March–September, the average is calculated using 2022/23 and 2023/24 for these months. Imports include both raw and refined sugar.

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

U.S. raw high-tier sugar imports are raised 88,000 STRV to 262,000 STRV, based on proprietary CBP entry data through the first week of April⁴. Brazil is the main origin for high-tier raw sugar imports between October 2024–February 2025 based on the publicly available U.S. Department of Commerce, Bureau of the Census data that contain detailed information on port of entry and country origin (figure 5). Expectedly, most of the high-tier raw sugar is entered into a few U.S. ports that are relatively close to cane refiners: Savannah, Philadelphia, San Diego, Baltimore, and New Orleans (figure 6).

U.S. refined⁵ high-tier sugar imports through the first week of April totaled 237,000 STRV. This number reflects a monthly average of 39,500 STRV, which is above the conservative 21,700-STRV-per-month pace assumption that has been used in prior *WASDE* reports. It is likely that some of these volumes were contracted last year, based on market conditions that favored refined high-tier imports. Such a strong sugar import pace may not continue in the second half of the fiscal year, given the historically large amount of available domestic sugar supplies. Domestic sugar supplies can compete with refined high-tier, especially since U.S. refined sugar prices have

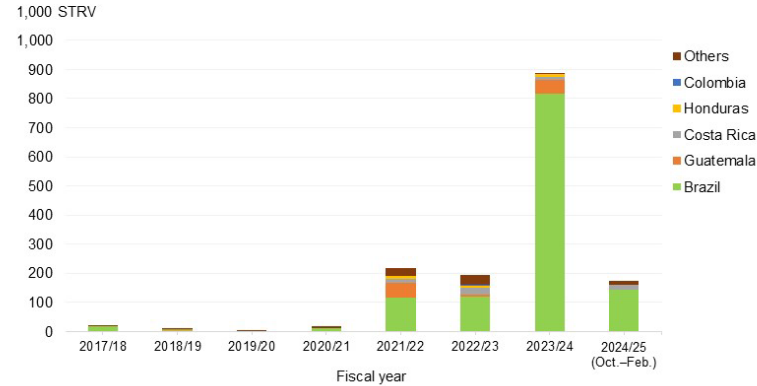
⁴ Imports of high-tier raw sugar are recognized in the *WASDE* balance sheet only after the sugar is entered into the United States, that is, the volume is not projected for the full fiscal year.

recently come down, particularly in the last 2 months. Thus, monthly imports of refined high-tier for the second half of the year are projected at a conservative pace equal to 75 percent of the first 6-month average, that is, $(39,500 \text{ STRV} \times 75 \text{ percent}) \times 6 \text{ months} = 177,750 \text{ STRV}$. Adding the actual entries (237,000 STRV) with the projected entries (177,750 STRV) results to a total refined high-tier sugar of 415,000 STRV, 93,400 STRV larger than last month.

The origin and entry ports for high-tier refined U.S. sugar imports are more varied than the raw sugar component. Based on the publicly available high-tier imports data from Census Bureau through February, in addition to Brazil, refined high-tier duty is sourced from another South American country (Colombia), as well as from Central America (Guatemala, El Salvador, Honduras) (figure 7). Also, aside from the top five ports⁶ (Philadelphia, Los Angeles, New York, San Francisco, and Laredo), about half of the high-tier refined imports, on average, were entered in several other ports (figure 8).

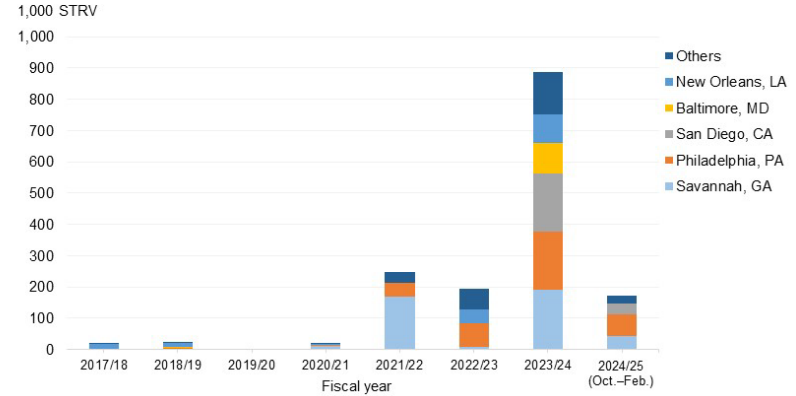
⁶ The top five ports for high-tier refined sugar were determined by sorting the volumes imported in 2023/24.

Figure 5
U.S. high-tier duty raw sugar^{1/} imports, by country of origin, fiscal years 2017/18–2024/25



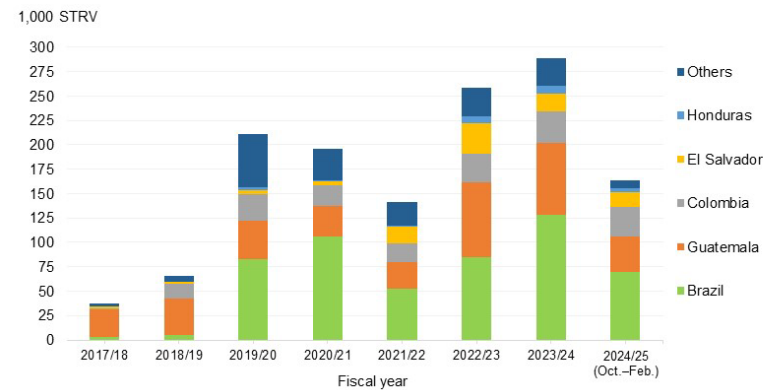
STRV = short tons, raw value; SCP = sugar-containing products.
 1/ The Harmonized Tariff Schedule (HTS) lines are 1701.12.5000, 1701.13.5000, and 1701.14.5000 for raw sugar.
 Source: USDA, Economic Research Service's calculation using U.S. Department of Commerce, Bureau of the Census trade data downloaded from the U.S. International Trade Commission's *DataWeb*.

Figure 6
U.S. high-tier duty raw sugar^{1/} imports, by U.S. port of entry, fiscal years 2017/18–2024/25



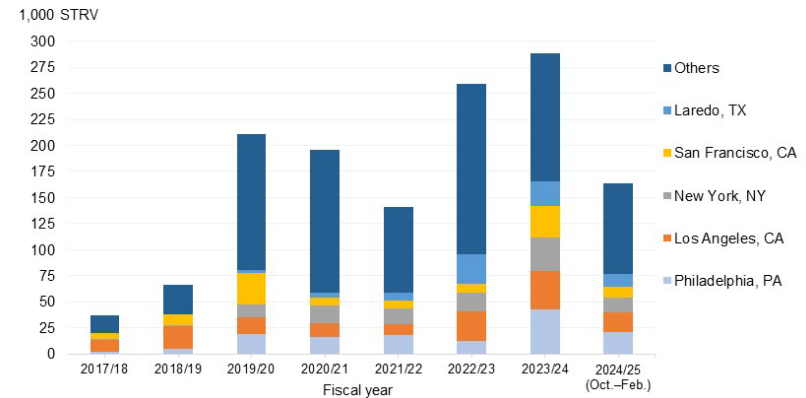
STRV = short tons, raw value; SCP = sugar-containing products.
 1/ The Harmonized Tariff Schedule (HTS) lines are 1701.12.5000, 1701.13.5000, and 1701.14.5000 for raw sugar.
 Source: USDA, Economic Research Service's calculation using U.S. Department of Commerce, Bureau of the Census trade data downloaded from the U.S. International Trade Commission's *DataWeb*.

Figure 7
U.S. high-tier duty refined^{1/} sugar imports, by country of origin, fiscal years 2017/18–2024/25



STRV = short tons, raw value; SCP = sugar-containing products.
 1/ Refined sugar includes "Refined", "Specialty", and "Sugar-containing product (SCP)/blends" categories. The corresponding Harmonized Tariff Schedule (HTS) lines are 1701.91.3000, 1701.99.5025, and 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 downloaded from the U.S. International Trade Commission's *DataWeb*.

Figure 8
U.S. high-tier duty refined^{1/} sugar imports, by U.S. port of entry, fiscal years 2017/18–2024/25

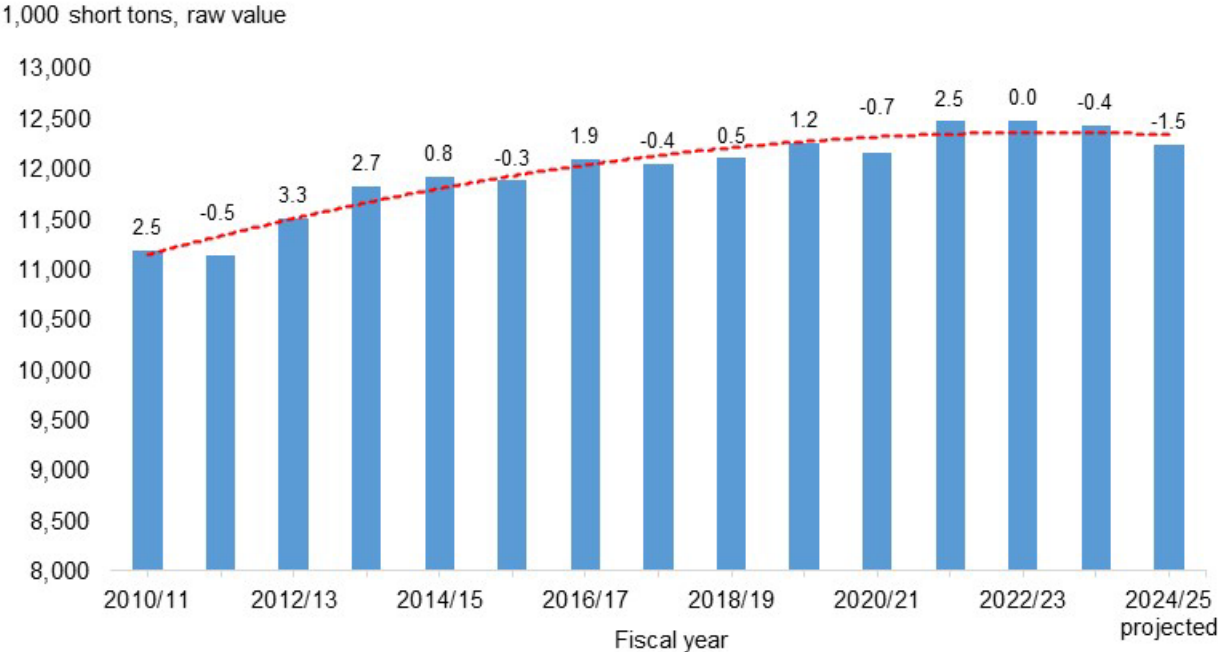


STRV = short tons, raw value; SCP = sugar-containing products.
 1/ Refined sugar includes "Refined", "Specialty", and "Sugar-containing product (SCP)/blends" categories. The corresponding Harmonized Tariff Schedule (HTS) lines are 1701.91.3000, 1701.99.5025, and 1701.99.5050 for refined sugar; 1701.99.5015 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 downloaded from the U.S. International Trade Commission's *DataWeb*.

U.S. 2024/25 Sugar Deliveries for Human Consumption Are Unchanged

The U.S. 2024/25 sugar deliveries for food and beverage use are unchanged from last month at 12.240 million STRV, a 1.5-percent over-the-year decline (figure 9). Sugar deliveries have been declining since the 2.5-percent surge in 2021/22 post-Coronavirus (COVID-19) pandemic, due to several factors. These factors include the return from just-in-case inventory management strategy to just-in-time, reduced food manufacturers' sales due to inflation or customers' recession concerns, increased competition from imported sugar-containing products, and the overall reduction in food and beverage consumption due to a shift in eating habits amid the rising adoption of glucagon-like peptide-1 (GLP-1) drugs.

Figure 9
U.S. sugar deliveries for food and beverage use, fiscal years 2010/11–2024/25



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, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)* report and USDA, Farm Service Agency, *Sweetener Market Data* report.

The delivery pace of refined beet and cane sugar continues to be slow, particularly for the latter. Through February, cane refiners delivered 117,000-STRV less volume than last year over the same period (table 2). While beet sugar deliveries were the lowest in 5 years in November and

December, volumes in February and January rebounded and were in line with the 5-year average. This recent uptick in delivery of beet sugar, given its competitive pricing relative cane sugar, likely helped in regaining market share and narrowing the gap to 43,000 STRV compared with last year.

The bulk-refined beet-sugar spot price reported in Sosland Publishing's *Sweetener Market* April 9 report hovers between 40–45 cents per pound, which is down 13–15 cents from the prior year. The low end (40 cents per pound) is 14 cents lower than the Northeast bulk-refined cane-sugar spot price and edging closer to the U.S. raw sugar (Number 16) price of 37.65 cents per pound through the first week of April (figure 10). Sosland also reported that forward trading for next year has been sluggish, despite lower offerings (between 39–42 cents per pound) but also noted that beet processors consider 40 cents per pound as the breakeven price to cover their production costs. The larger beet sugar planting intentions for 2025/26 also added bearish sentiments.

Table 2: U.S. cumulative sugar deliveries for food and beverage use by component, October-February, 2022/23–2024/25

Components	2022/23	2023/24	2024/25	5-year average 1/	Annual change (2024/2025 versus 2023/2024)	
	1,000 STRV				Percent	
Beet sugar processors	2,073	1,990	1,947	2,036	-43	-2.2
Cane sugar refiners	2,684	2,779	2,662	2,634	-117	-4.2
Total reporters	4,757	4,769	4,610	4,670	-160	-3.4
Non-reporters (direct consumption)	404	236	217	334	-19	-7.9
Total	5,161	5,005	4,827	5,003	-178	-3.6
	Percent share in total				Percentage points	
Beet sugar processors	40.2	39.8	40.3	40.7	0.6	N/A
Cane sugar refiners	52.0	55.5	55.2	52.7	-0.4	N/A
Total reporters	92.2	95.3	95.5	93.3	0.2	N/A
Non-reporters (direct consumption)	7.8	4.7	4.5	6.7	-0.2	N/A
Total	100.0	100.0	100.0	100.0	0.0	N/A

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

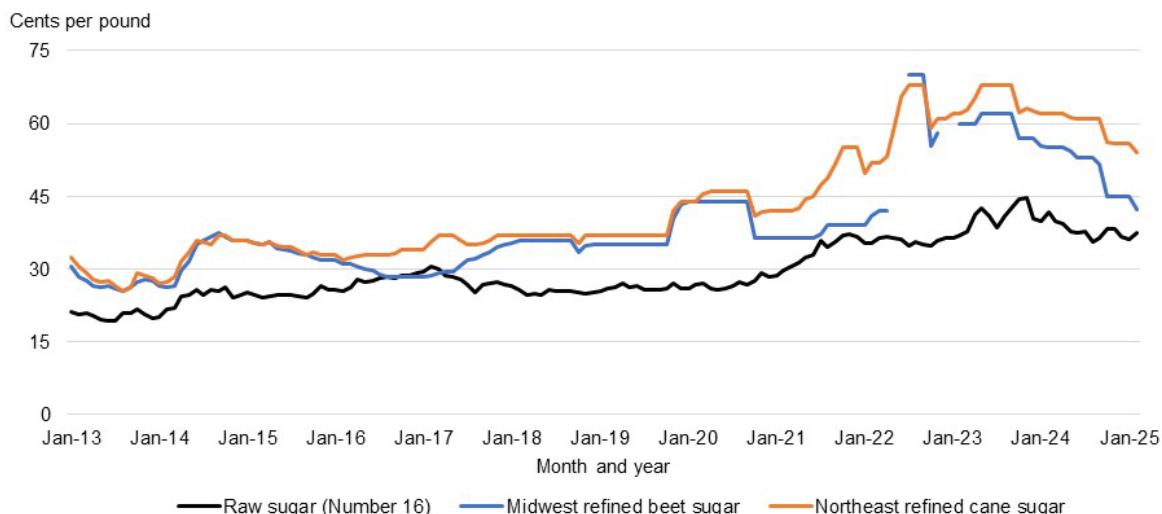
Note: Totals and share may not add due to rounding. "Reporters" refer to beet processors and cane refiners covered under the sugar program that report their data to USDA's Farm Service Agency's monthly *Sweetener Market Data (SMD)* report. "Non-reporters" do not report to *SMD* and their imports are assumed to be refined sugar for direct consumption or delivery to an end-user. Non-reporter imports are calculated by subtracting the reporters' imports from the *SMD report* from the total imports in the USDA's Foreign Agricultural Service's *U.S. Sugar Monthly Import and Re-Exports* report.

1/ 5-year average includes 2019/20–2023/24.

Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 10

U.S. prices for raw cane sugar, bulk refined beet, bulk refined cane, monthly average, January 2013–April 2025

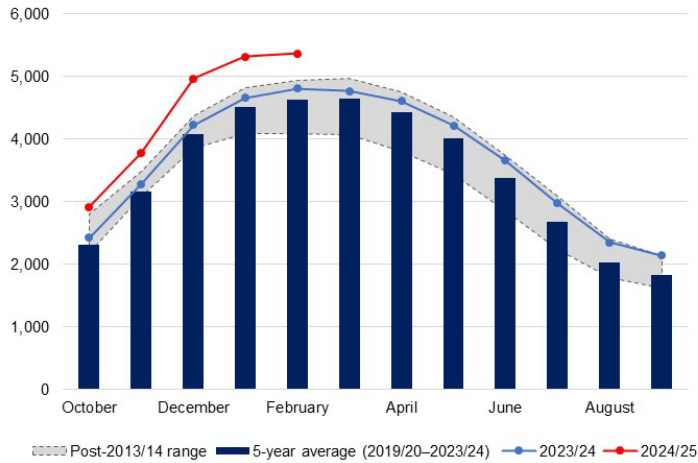


Note: The U.S. raw sugar (Number 16) is duty fee paid by deliverer; it represents the average of the nearest futures month for which an entire month of daily prices will be available. The U.S. bulk refined beet sugar and cane sugar spot prices are free on board plant basis, and reported by Sosland on a weekly basis. The breaks in the refined beet sugar price series are due to data unavailability. The April 2025 data reflects the prices published by Sosland on April 9.

Source: USDA, Economic Research Service calculations using data from Intercontinental Exchange (ICE) and Sosland Publishing's *Sweetener Report*.

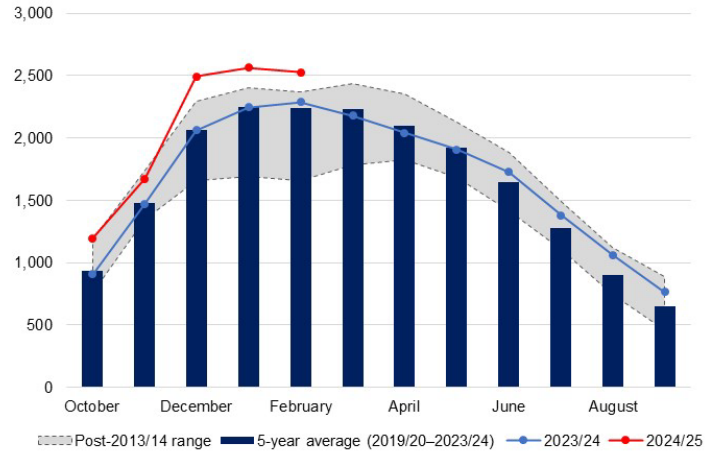
Given the sluggish pace of deliveries, total sugar ending stocks in the *SMD* as of February 28 (5.364 million STRV) are the highest since 2013/14 (figure 11). Breaking down by type, raw cane sugar stocks held jointly by cane refiners and cane processors (2.526 million STRV) are at a record level (figure 12). Refined cane sugar and beet sugar inventories are at record (500,000 STRV) and near record high (2.342 million STRV), respectively (figures 13 and 14).

Figure 11
U.S. total sugar ending stocks, monthly, 2013/14–2024/25



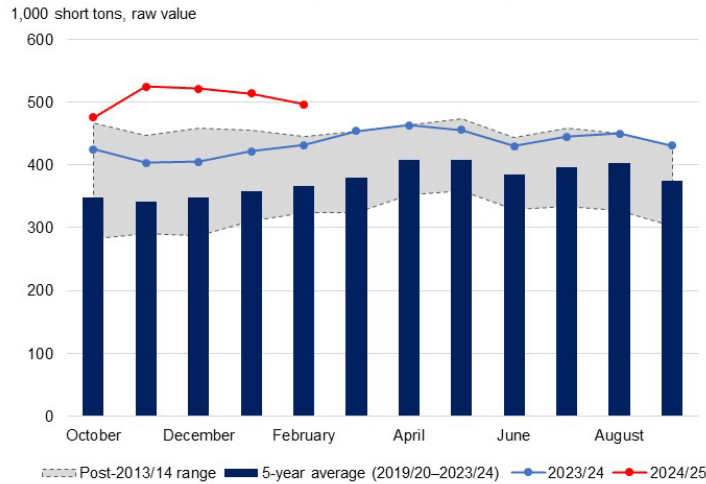
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 12
U.S. raw cane sugar ending stocks (cane refiners and cane processors), monthly, 2013/14–2024/25



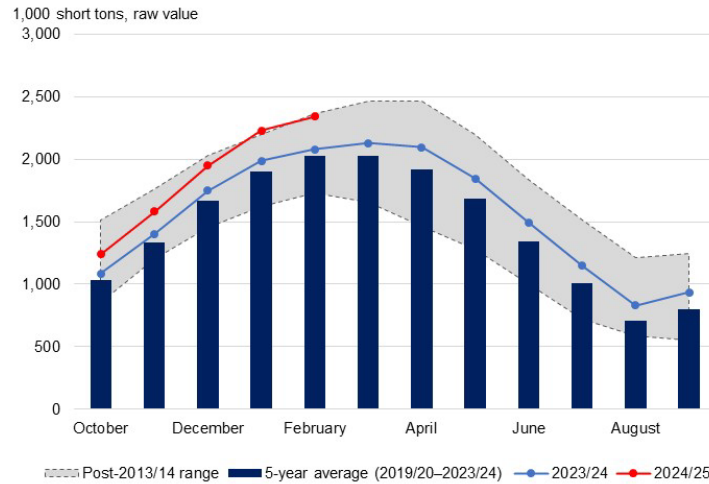
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 13
U.S. sugarcane refiners' refined sugar inventories, monthly, 2013/14–2024/25



Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 14
U.S. sugarbeet processors' total sugar inventories, monthly, 2013/14–2024/25



Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Mexico's Sugar Outlook

Mexico's 2024/25 Sugar Balance is Unchanged

In the April *World Agricultural Supply and Demand Estimates (WASDE)* report, Mexico's 2024/25 sugar balance is unchanged (table 3). Mexico's sugar exports to the United States are capped at 425,127 metric tons, actual weight (MT) (or 496,740 STRV). Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) released its third estimate on March 26 and lowered its projected production from 5.024 million MT to 4.987 million (table 4), but remains higher than USDA's 4.859 million MT.

Mexico's total sugar production through week 27 (as of April 5) reached 3.624 million MT, 47,000-MT larger than last year over the same period (table 5). This year's cumulative sugar production has been trailing last year up until week 26, after stronger weekly outturns started in week 22. The pace of cumulative area harvested still lags last year but is more than offset by the higher sugarcane yield and sucrose recovery.

In terms of sugar type, estándar (standard sugar), which traditionally comprises the largest share of mills' output and is intended for the domestic market, is being prioritized as it is the only type that is higher year over year. In particular, the cumulative production of low polarity sugar remains behind last year by 5 percent, but the weekly pace has picked up starting week 21. While CONADESUCA's third estimate reduced the outlook for low polarity sugar, from 397,000 MT to 387,000, Mexico technically only needs to produce 298,000 MT, or 70 percent of the March U.S. Needs (425,127 metric tons) per the terms of the suspension agreements. The 298,000-MT volume, which is about the same level as last year's production (295,000 MT), is likely achievable given the pace to date.

Table 3: Mexico's sugar supply and use by fiscal year (October-September), metric tons, actual weight

	2022/23	2023/24	2024/25		
	Final	Final	March (forecast)	April (forecast)	Monthly change
Beginning stocks	964	835	1,418	1,418	0
Production	5,224	4,704	4,859	4,859	0
Imports	285	761	189	189	0
Imports for consumption	267	722	164	164	0
Imports for sugar-containing product exports (IMMEX)	18	40	25	25	0
Total supply	6,473	6,300	6,466	6,466	0
Disappearance					
Human consumption	4,193	4,127	4,198	4,198	0
For sugar-containing product exports (IMMEX)	405	304	355	355	0
Other deliveries and end-of-year statistical adjustment	29	5	0	0	0
Total	4,627	4,436	4,553	4,553	0
Exports	1,011	446	957	957	0
Exports to the United States and Puerto Rico	989	446	425	425	0
Exports to other countries 1/	22	0	532	532	0
Total use	5,638	4,882	5,510	5,510	0
Ending stocks	835	1,418	956	956	0
Stocks-to-human consumption (percent)	19.9	34.4	22.8	22.8	0.0
Stocks-to-use (percent)	14.8	29.0	17.3	17.3	0.0
High-fructose corn syrup (HFCS) consumption (dry weight)	1,392	1,599	1,570	1,570	0

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

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

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

Source: 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 4: CONADESUCA's Mexico 2024/25 sugar production estimates relative to prior years (2017/18–2023/24)

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 first est.	742,934	63.13	46,900	10.81	6.82	5,070
2024/25 second est.	747,310	62.95	47,042	10.68	6.72	5,024
2024/25 third est.	746,882	63.14	47,159	10.57	6.68	4,987

est. = estimate; ha = hectares; MT = metric tons.

Note: CONADESUCA's first estimate was published on November 19, 2024, second estimate on February 10, 2025, and the third estimate on March 26.

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

Table 5: Mexico's cumulative sugar production through week 27, fiscal years 2023/24 and 2024/25

	Through week 27		Difference	
	2023/24	2024/25	Level	Percent
Area harvested (1,000 ha)	539	514	-24	-5
Sugarcane processed (1,000 MT)	35,746	35,169	-577	-2
Sugarcane yield (MT per ha)	66.4	68.4	2.0	3
Extraction rate (percent)	10.0	10.3	0.3	3
Agro-industrial yield (MT sugar per ha)	6.6	7.1	0.4	6
Sugar production (1,000 metric tons)	3,577	3,624	47	1
By type:				
Refinada	832	727	-105	-13
Estándar	2,427	2,597	170	7
Blanco especial	48	47	-1	-2
Mascabado	3	0	-3	N/A
Polarity less than 99.2	268	254	-14	-5

ha = hectares; MT = metric tons; N/A = not applicable.

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

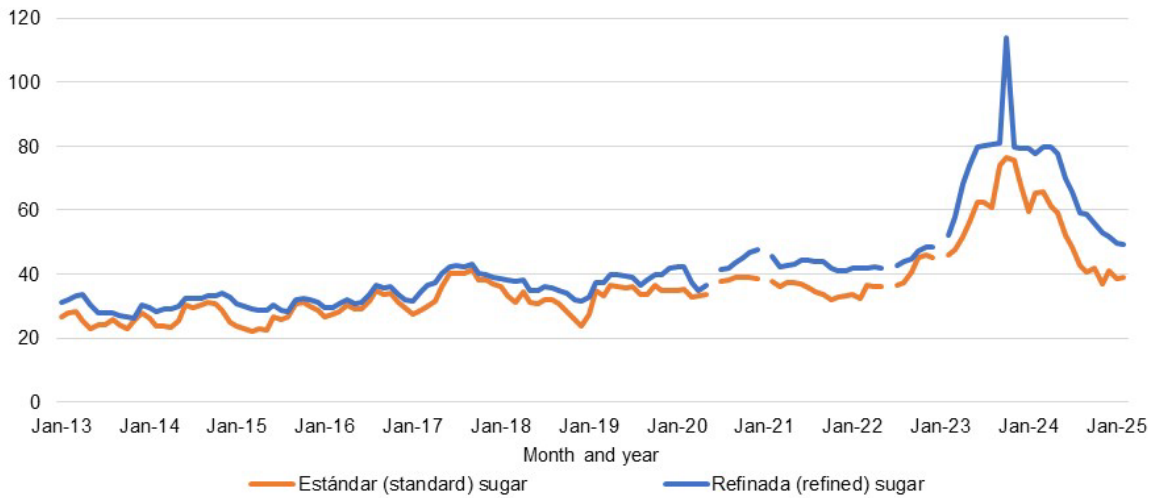
Mexico's Sugarcane Growers Ended The Blockade of Mills' Warehouses

On April 1, Mexico's sugarcane growers and workers, led by the CNPR (National Confederation of Rural Producers) and UNPCA (National Union of Sugarcane Producers) unions, ended their 19-day blockade of all sugar mills' warehouses after the agreed upon volume for export had been shipped. Mexico's multi-year high sugar imports in 2023/24 (that included high-tier sugar, mainly due to poor crop) led to large carryover stocks into 2024/25. Per USDA, FAS Mexico City Post reporting, blockade organizers argued that the mills' failure to comply with the agreement to ship about 400,000 MT to the world market before January 31 caused domestic sugar prices to decline (figure 15). This price reduction can ultimately reduce reference prices used in determining grower payments. Post indicated that the seizure of the warehouses did not have significant impact on sugar production since field work (burning, cutting, and transporting cane to the mill) and factory operations continued as scheduled.

Figure 15

**Mexico's sugar prices, wholesale center (Iztapalapa, Mexico City) , monthly average, January 2013–
March 2025**

U.S. cents per pound



Note: The breaks in the sugar price series are due to data unavailability. The monthly average is the simple average of daily prices. The daily prices reported by SNIIM are determined using several criteria, which can be found in the Ministry of Economy's SNIIM website.

Source: USDA, Economic Research Service calculations using data from Servicio Nacional de Información e Integración de Mercados (SNIIM) for Mexico prices, and U.S. Federal Reserve Bank for the exchange rates.

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