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Sugar and Sweeteners Outlook: May 2025

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In this report:

U.S. 2025/26 Sugar Supply Is Forecast Lower; Mexico's 2025/26 Sugar Production Is Projected to Recover

In the May *World Agricultural Supply and Demand Estimates* (*WASDE*) report, the U.S. 2025/26 sugar supply is forecast at 13.791 million short tons, raw value (STRV), almost 600,000 STRV lower than the prior year. Sugar deliveries for food and beverage use are projected at 12.150 million STRV, matching 2024/25 which was reduced from last month by 90,000 STRV. With the other use component set at 105,000 STRV, also equal to the 2024/25 estimate, the 2025/26 total sugar use is 12.355 million STRV. The corresponding ending stocks-to-use ratio is 11.6 percent, as the U.S. Department of Agriculture has yet to announce the 2025/26 U.S. additional specialty sugar tariff-rate quota (TRQ). If this volume is assumed to be set no lower than the 2024/25 level (about 231,000 STRV), then the stocks-to-use ratio would be 13.5 percent.

Mexico's 2025/26 sugar production is projected at 5.094 million metric tons (MT), a 6 percent recovery from the weather-affected 2024/25 campaign. Mexican sugar exports to the United States (under the terms of the suspension agreements) are forecast at 572,489 MT, already accounting for the 2025/26 U.S. additional specialty TRQ that is yet to be announced. Ending stocks for 2024/25 and 2025/26 are 1.081 million MT, which now include 150,000 MT of low-polarity sugar after the National Committee for the Sustainable Development of Sugarcane (CONADESUCA) reflected this volume in its balance sheet. This sugar type is destined for exports to the United States during the first quarter of the fiscal year, when the harvest campaign is just starting.

U.S. Sugar Outlook

U.S. 2025/26 Sugar Production Is Projected Lower Than 2024/25

Domestic sugar production for fiscal year 2025/26 is projected at 9.285 million STRV, down from a relatively stable level between 2023/24–2024/25 (table 1). Beet sugar output is forecast at 5.180 million STRV, down 155,000 STRV (3 percent) from the record high estimated for 2024/25. Cane sugar output is forecast at 4.105 million STRV, up 128,000 STRV (3 percent) from 2024/25. Louisiana's output is projected at 2.088 million STRV, reflecting 6 consecutive years of increase, and 4 years of surpassing Florida (figure 1). The main underlying assumption is a continuation of moderate acreage growth in Louisiana. On the other hand, Florida's cane sugar production is projected at 2.017 million STRV, assuming stable acreage. The parameters (sugarcane yield and sucrose recovery) for both States are assumed to track recent years' averages under normal weather patterns.

U.S. 2025/26 sugarbeet planted area (1.104 million acres) is based on the USDA, National Agricultural Statistics Service (NASS) March 2025 *Prospective Plantings* report for the United States (1.132 million acres) less California (28,000 acres) due to the closure of the Spreckels Sugar Company, Incorporated in Brawley[1] (table 2). The harvested area (1.081 million acres) is derived using a 10-year average of harvested-to-planted ratio (97.9 percent). NASS will provide its first official estimate of area planted and projected area harvested in the June 30 *Acreage* report.

Since NASS' initial sugarbeet yield forecast will not be released until its August 11 *Crop Production* report, sugarbeet yield is projected at 31.863 tons per acre using a regression model, where yield is a function of the NASS planting progress, as of week 18 for the 4 largest sugarbeet-growing U.S. States (Minnesota, North Dakota, Idaho, and Michigan). Progress through week 18 or 19 is seen as a relatively good predictor of final yields. Mid-May is considered a critical cut-off point to achieve optimal crop development, allowing sugarbeets sufficient time to deposit sugar before harvest.

[1] On April 22, 2025, the Southern Minnesota Beet Sugar Cooperative announced the closing of the nearly century-old Spreckels Sugar Company, Incorporated in Brawley, California. With the closure of Spreckels, the last sugarbeet processing plant in California, sugarbeet production is expected to cease and thus, the planted acreage in the State—about 2.5 percent of the total U.S. sugarbeet area—is zeroed out for 2025/26. Unlike the rest of the sugarbeet-producing States, in California, sugarbeets are planted in the fall and harvested between April–July. The plant closing process is expected to begin in late July after the current harvest season winds down. Warehousing and shipping will continue from around late 2025 or early 2026 until all the products have left the facilities. The economic reasons cited for the closure include rising operating costs, declining sugar and co-product prices, increasing competition from high-tier duty sugar imports, sustained inflationary pressure since the COVID-19 pandemic, and uncertainty in the macroeconomic environment.

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

	2023/24	2024/25	2024/25		2025/26
	Final	April (estimate)	May (estimate)	Monthly change	May (forecast)
Beginning stocks	1,843	2,131	2,131	0	2,032
Total production	9,313	9,369	9,311	-57	9,285
Beet sugar	5,172	5,391	5,334	-57	5,180
Cane sugar	4,141	3,978	3,977	-1	4,105
Florida	2,079	1,930	1,929	-1	2,017
Louisiana	2,022	2,049	2,049	0	2,088
Texas 1/	40	0	0	0	0
Total imports	3,840	2,961	2,944	-16	2,475
Tariff-rate quota imports	1,788	1,533	1,533	0	1,419
Other program imports	300	200	200	0	200
Non-program imports	1,752	1,228	1,212	-16	855
Mexico	521	497	497	0	669
High-tier tariff/other	1,231	731	715	-16	186
High-tier tariff	1,176	677	660	-16	131
Raw sugar	887	262	323	62	0
Refined sugar	289	415	337	-78	131
Other 2/	55	55	55	0	55
Total supply	14,995	14,461	14,387	-74	13,791
Total exports	249	100	100	0	100
Miscellaneous	81	0	0	0	0
Total deliveries	12,534	12,345	12,255	-90	12,255
Domestic food and beverage	12,428	12,240	12,150	-90	12,150
Sugar-containing products re-export program	83	80	80	0	80
Polyhydric alcohol, feed, other alcohol	23	25	25	0	25
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0
Total use	12,864	12,445	12,355	-90	12,355
Ending stocks	2,131	2,016	2,032	16	1,436
Private	2,131	2,016	2,032	16	1,436
Commodity Credit Corporation	0	0	0	0	0
Stocks-to-use ratio (percent)	16.6	16.2	16.4	0.2	11.6

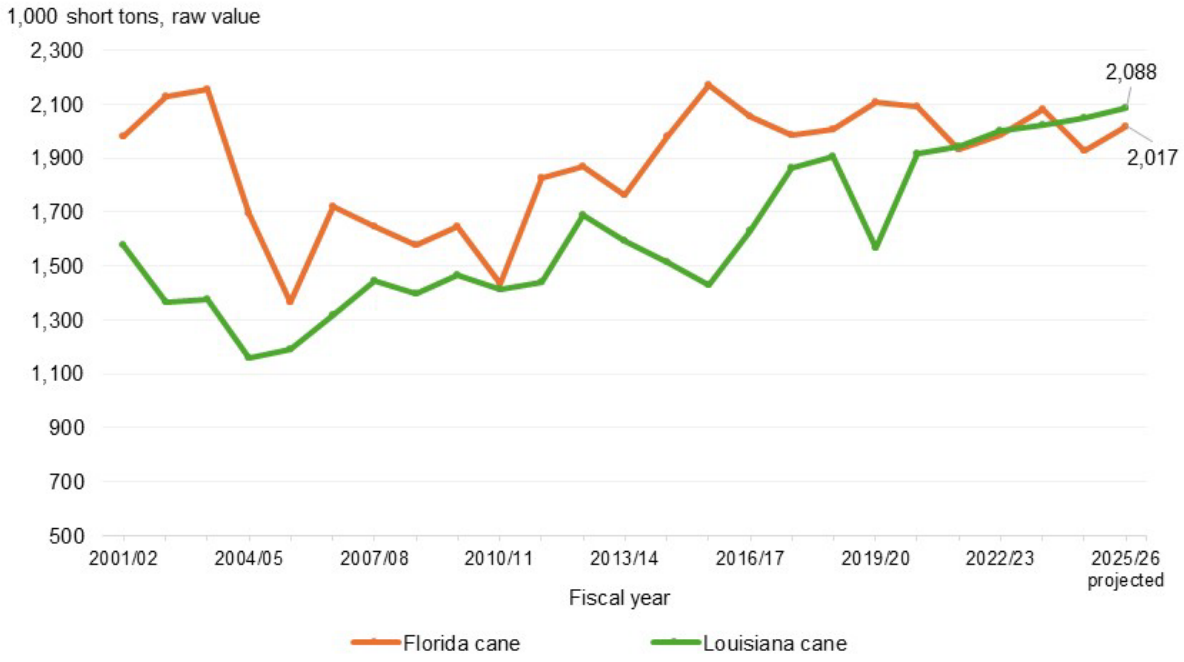
Note: Totals and monthly changes may not add due to rounding.

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 1

U.S. production of cane sugar, fiscal years 2001/02–2025/26



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

The sugarbeet shrink (6.761 percent) and recovery rate (14.786 percent) are both projected, based on a 10-year national average. Sugar produced from desugared molasses is forecast at 400,000 STRV, on increased capacity from capital improvements last year. Thus, the 2025/26 crop year beet sugar production amounts to 5.150 million STRV. Sugar produced from imported beets is projected at 30,000 STRV, lower than 2024/25, to reflect the 33-percent reduction in sugarbeet acreage in Canada.[2] Assuming a similar volume (666,0000 STRV) for early production in August–September 2025 and 2026, the 2025/26 fiscal year beet sugar production is projected at 5,180 million STRV.

For 2024/25, domestic sugar production is lowered from last month by 57,500 STRV to 9.311 million, mainly on reduction to the beet sugar output due to increased beet pile shrink and less sugar output from desugared molasses. Despite the downward adjustment, the 2024/25 domestic sugar output would match 2023/24 (about 9.300 million STRV) as the largest on record.

[2] On March 14, 2025, the Michigan Sugar Company announced that it completed a share-redemption program through which the cooperative's grower-owners in Ontario, Canada sold back 3,582 shares. This decision is expected to reduce the availability of Canadian acres for planting sugarbeets for the crop year 2025/26 from 10,898 acres to 7,316 acres, or about 33 percent.

Table 2: U.S. beet sugar production, 2023/24–2025/26

	2023/24 final	2024/25 April	2024/25 May	Monthly change	2025/26 May	Annual change
Area planted (1,000 acres) 1/	1,125	1,104	1,104	0	1,104	0
Planted/Harvested ratio 2/	0.990	0.983	0.983	0	0.979	0
Area harvested (1,000 acres)	1,114	1,086	1,086	0	1,081	-5
Yield (tons per acre) 3/	32.20	32.50	32.50	0	31.863	-0.6
Sugarbeet production (1,000 tons)	35,884	35,278	35,278	0	34,452	-826
Sugarbeet shrink (percent) 4/	7.935	7.721	8.064	0.343	6.761	-1.303
Sugarbeet sliced (1,000 tons)	33,037	32,554	32,433	-121	32,122	-311
Sugar extraction rate from slice (percent) 5/	14.742	15.415	15.360	-0.055	14.786	-0.574
Sugar from beets sliced (1,000 STRV)	4,870	5,018	4,982	-36	4,750	-232
Sugar from molasses (1,000 STRV) 6/	275	357	340	-17	400	60
Crop year sugar production (1,000 STRV)	5,145	5,375	5,322	-53	5,150	-172
Aug.–Sep. sugar production (1,000 STRV)	663	690	690	0	666	-24
Aug.–Sep. sugar production of next crop (1,000 STRV) 7/	690	666	666	0	666	0
Sugar from imported beets (1,000 STRV) 6/	N/A	40	37	-3	30	-7
Fiscal year sugar production (1,000 STRV) 7/	5,172	5,391	5,334	-57	5,180	-155

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

Note: 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.

1/ For 2024/25 and 2025/26, based on USDA, National Agricultural Statistics Service (NASS).
2/ For 2024/25, based on NASS. For 2025/26, based on a 10-year average.
3/ For 2024/25, based on NASS. For 2025/26, projected using regression analysis where yield is a function of the NASS planting progress, as of week 18 for the 4 largest sugarbeet-growing U.S. States (Minnesota, North Dakota, Idaho, and Michigan)
4/ For 2024/25, based on beet processors' estimate submitted to *SMD* data. For 2025/26, based on a 10-year average.
5/ For 2024/25, projected using regression analysis using July 2024–March 2025 *SMD* data. For 2025/26, based on a 10-year average.
6/ For 2024/25, based on beet processors' estimate. For 2025/26, based on beet processors' increased capacity from capital improvements.
7/ For 2024/25, based on a 5-year average, which is carried over to 2025/26.
8/ For 2023/24, sugar from imported beets is already included in the final crop year production. For 2024/25, based on *SMD* data and for 2025/26, based on the 2024/25 number less than the expected reduction in sugarbeet acreage in Canada. Sugar production from this component is separated for projection purposes and will be included in the total, as with 2023/24, once the full crop year slice is available.
9/ Fiscal year sugar production = crop year sugar production – August to September sugar production + August to September sugar production of next crop.

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

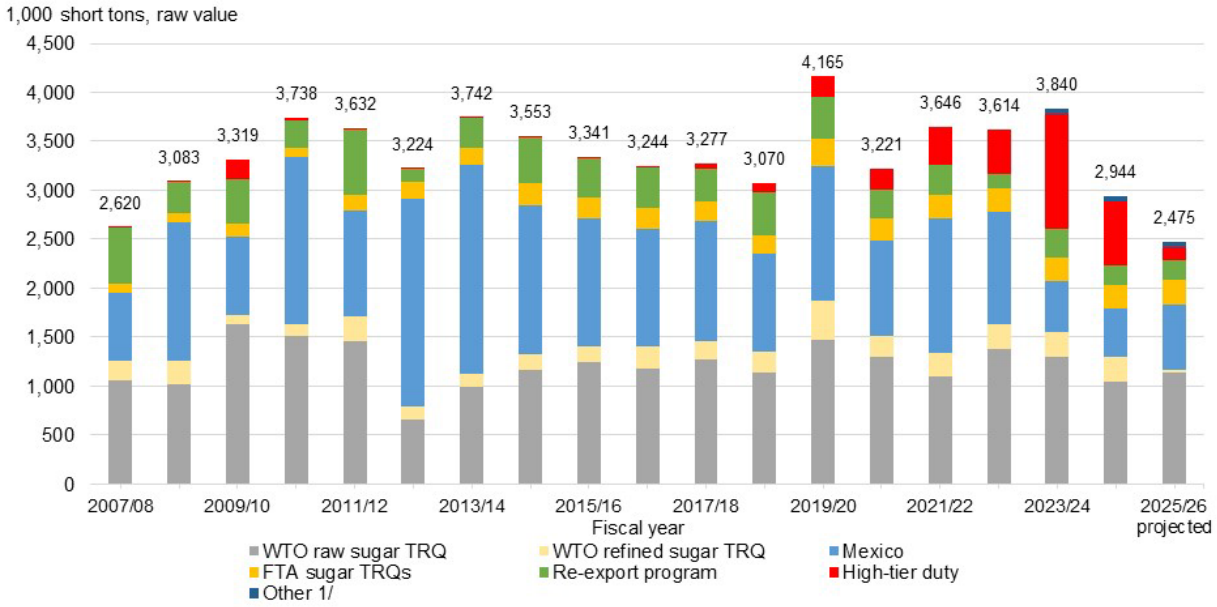
U.S. Sugar Imports for 2025/26 Are Set at Minimum Levels; 2024/25 Sugar Imports Are Lowered

For 2025/26, U.S. sugar imports are initially set at 2.475 million STRV, based on minimum commitment levels under the WTO raw (1,137,438 STRV) and refined sugar (24,251 STRV) TRQs, and free trade agreements (257,736 STRV) (figure 2). Base levels are also set for re-export program imports (200,000 STRV) as well as for high-tier duty imports (131,374 STRV)—all of which are refined sugar. That is, the high-tier raw sugar component is initially set to zero and will only be reflected in the *WASDE* balance sheet after entering the United States. Sugar from imported molasses is set at 54,645 STRV, same as 2024/25. Sugar imports from Mexico (668,925

STRV) are initially derived on the assumption that the 2025/26 additional specialty refined sugar TRQ, once announced, will not be lower than the 2023/24 level (231,485 STRV).

Figure 2

U.S. sugar imports by type, fiscal years 2007/08–2025/26



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

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.

For 2024/25, U.S. sugar imports are lowered from last month by 16,000 STRV to 2.944 million STRV, the lowest level since 2007/08 and almost 1 million tons lower than last year. This year-over-year decrease is primarily driven by the reduction in raw sugar imports. The raw sugar component of high-tier imports has the largest reduction from 2023/24 (down 563,000 STRV), followed by raw sugar WTO TRQ (down 258,000 STRV).

This month's 16,000-STRV decrease in 2024/25 U.S. sugar imports is solely based on adjustments to high-tier sugar duty imports[3], which now stands 660,000 STRV, as the increase in the raw sugar portion is more than offset by the reduction in the refined sugar component. Thus, while high-tier sugar was traditionally the smallest U.S. sugar import category and was mostly

[3] 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.

comprised of high-value, refined sugar that is difficult to source domestically, this category has overtaken Mexico as the second largest source of U.S. sugar imports behind the raw sugar World Trade Organization (WTO) tariff-rate quota (TRQ) in the past 2 years (2023/24–2024/25).

U.S. 2024/25 raw high-tier sugar imports are raised 62,000 STRV to 323,000 STRV, based on proprietary entry data from the U.S. Department of Homeland and Security, Customs and Border Protection (CBP) through the first week of May[4]. On the other hand, refined high-tier sugar imports through the first week of May, according to the Customs data, amounted to about 252,000 STRV. The remaining pace of refined high-tier sugar imports through September is revised downward to about 17,000 STRV per month, given the increased availability of competitively priced domestic refined sugar (figure 3). Thus, 2024/25 refined high-tier sugar imports are now estimated at 337,000 STRV[5], reflecting a 78,000-STRV reduction from last month's estimate.

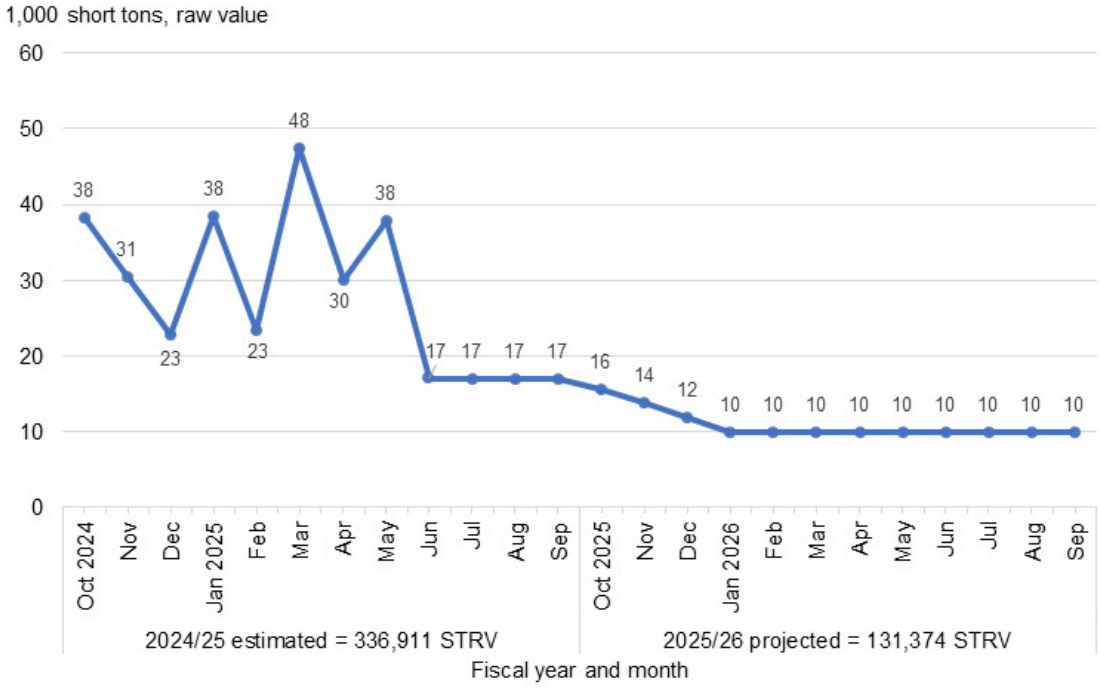
The high-tier refined sugar import pace is expected to further decelerate for the remainder of the calendar 2025 year (October–December 2025) and stabilize at a monthly pace of 10,000 STRV for January-September 2026. Thus, for 2025/26, high-tier refined sugar imports are projected at 131,374 STRV.

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

[5] The formula is: 252,000 through May 5 + (17,000 x 5) for the remaining period = 337,000 STRV.

Figure 3

U.S. high-tier duty refined sugar imports, monthly, fiscal years 2024/25–2025/26



Note: Totals may not add due to rounding.

Source: USDA, Economic Research Service calculations using data from USDA, World Agricultural Outlook Board and USDA, Foreign Agricultural Service.

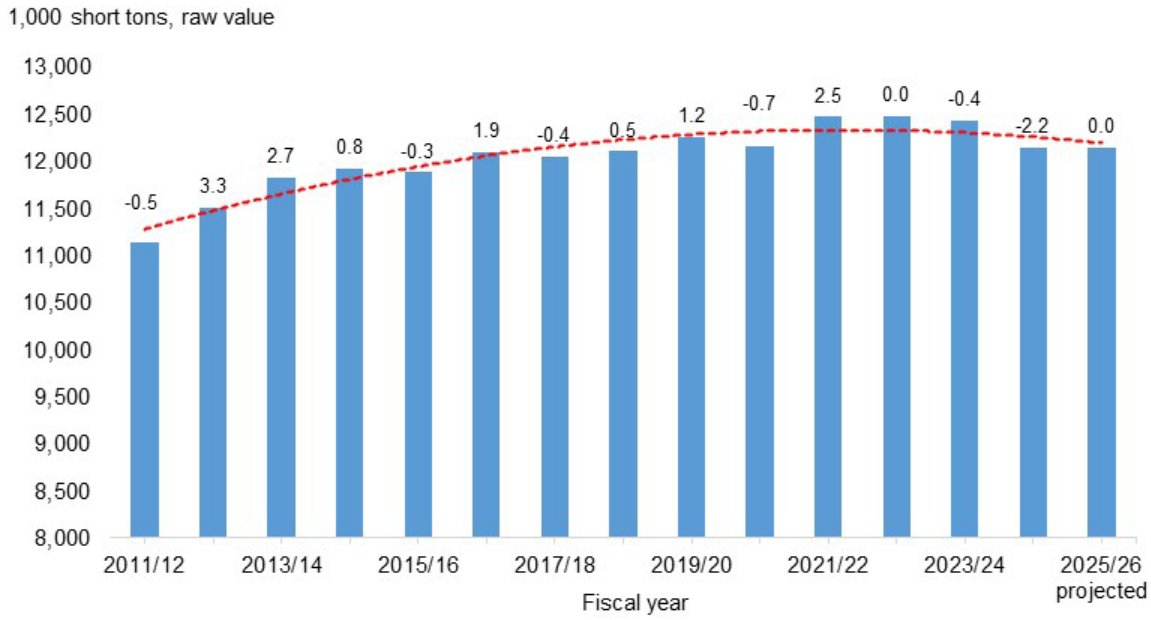
U.S. 2024/25 Sugar Deliveries for Human Consumption Are Reduced; Carried Over to 2025/26

U.S. 2024/25 sugar deliveries for food and beverage use are reduced from last month by 90,000 STRV to 12.150 million STRV, on a slower-than-expected pace during the first 6 months and the expectation that the pace will not significantly pick-up for the rest of the fiscal year. This updated estimate is carried over to 2025/26, reflecting a flat growth (figure 4).

The downward adjustment to the 2024/25 estimate reflects a 2.2-percent over-the-year decline from 2023/24. Sugar deliveries have been slowing down 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 4

U.S. sugar deliveries for food and beverage use, fiscal years 2011/12–2025/26



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.

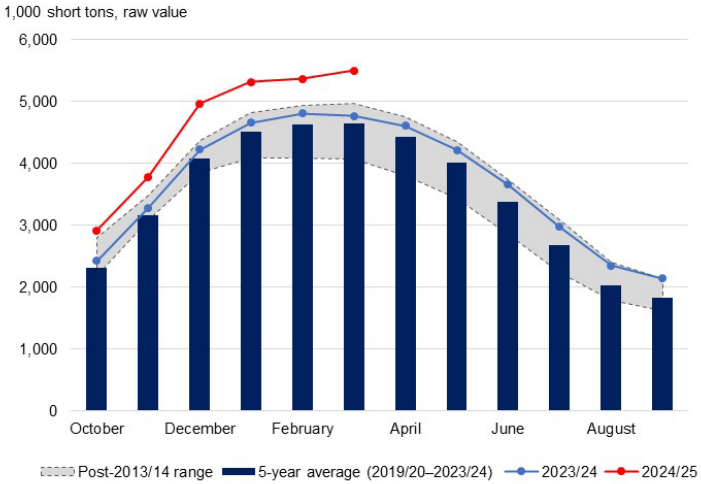
The delivery pace of refined beet and cane sugar continues to be slow, particularly for the latter. Through March, cane refiners delivered 130,000-STRV less volume than last year over the same period (table 3). While beet sugar deliveries were the lowest in 5 years in November and December, volumes rebounded in the succeeding months and were in line with the 5-year average. This recent uptick (January–March) in the delivery of beet sugar, given its competitive pricing relative to cane sugar, helped in regaining market share and narrowing the gap to 23,000 STRV compared with last year.

The bulk refined beet sugar nominal price for 2024/25 reported in Sosland Publishing's *Sweetener Market* May 14 report hovers between 38–40 cents per pound, down about 17 cents from the prior year. Beginning on its April 30 report, Sosland noted the spot beet sugar market was moved to nominal terms due to the lack of sales. The low end (38 cents per pound) is 15 cents lower than the Northeast bulk refined cane sugar spot price and edging closer to the U.S. raw sugar (Number 16) nearby July price of 37.22 as of May 14. Sosland reported that forward trading of refined beet sugar for next year (2025/26) offered between 38–42 cents per pound, has been sluggish but also noted that beet processors consider 40 cents per pound as the breakeven price to cover their production costs.

Based on the *SMD*, total sugar ending stocks as of February 31 (5.494 million STRV) are the highest since 2013/14 (figure 5). Refined beet and cane sugar inventories are near record (2.406 million STRV) and at record high (558,000 STRV), respectively (figures 6 and 7).
In addition, raw cane sugar stocks held jointly by cane refiners and cane processors (2.530 million STRV) are at a record level, indicating adequate raw throughput (figure 8).

Figure 5

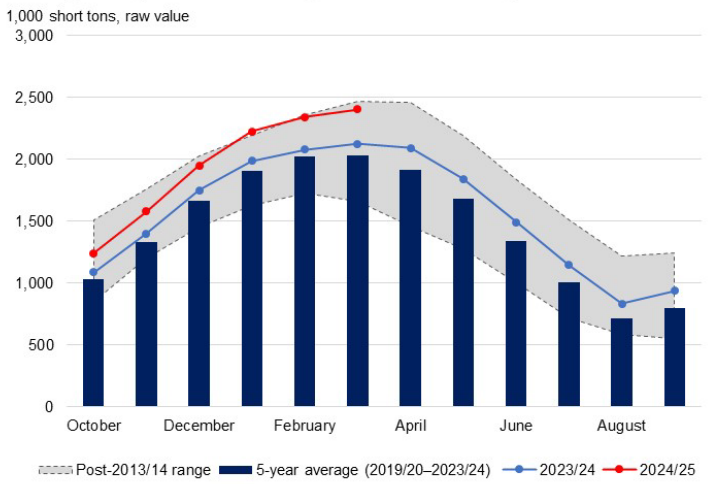
U.S. total sugar ending stocks, monthly, 2013/14–2024/25



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

Figure 6

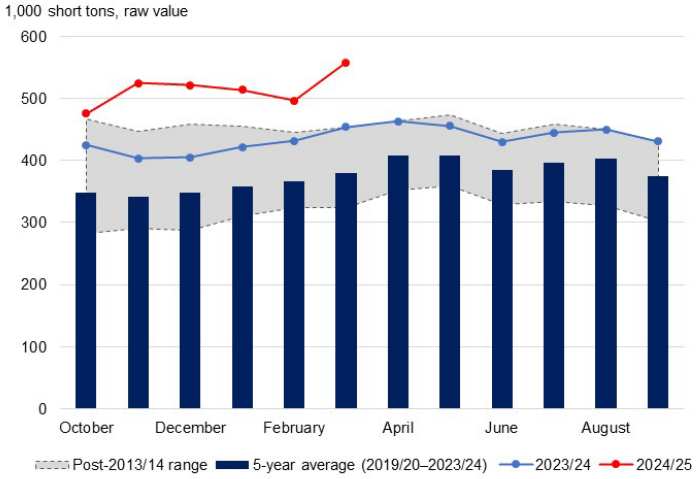
U.S. sugarbeet processors' total sugar inventories, monthly, 2013/14–2024/25



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

Figure 7

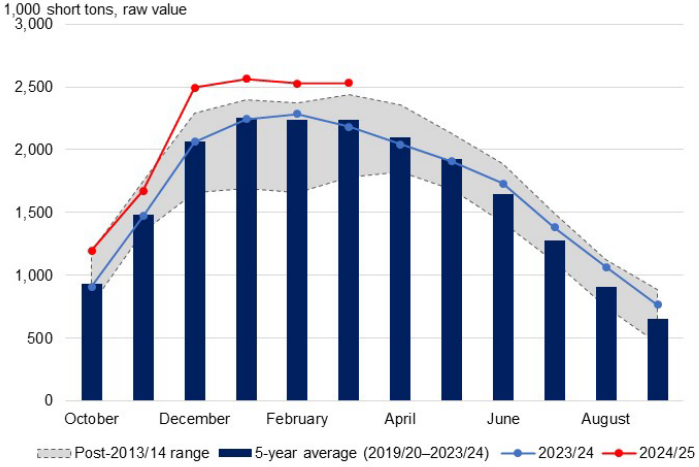
U.S.sugarcane refiners' refined sugar inventories, monthly, 2013/14–2024/25



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

Figure 8

U.S. raw cane sugar ending stocks (cane refiners and processors), 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 Production is Lowered; Projected To Recover for 2025/26

Mexico's 2024/25 sugar production is adjusted downward from last month by 48,000 metric tons (MT), actual weight to 4.811 million, as the campaign nears completion (table 4). The adjustment is based on the April 2025 USDA, Foreign Agricultural Service (FAS) Mexico City *Sugar Annual* report. While the 4.811 million MT is lower than the fourth estimate[6] published by Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) (4.837 million MT) on May 6, it reflects a 107,000-STRV increase (2 percent) from the weather-reduced production in 2023/24.

For 2025/26, Mexico's sugar production is projected at 5.094 million metric tons (MT), reflecting a recovery of 283,000-MT or 6 percent. The forecast is also based on the FAS April report, which projects area harvested at 760,000 hectares, sugarcane yield at 64.2 MT per hectare, and sucrose factory recovery at 10.44 percent.

Mexico's total sugar production through week 31 (as of May 3) reached 4.397 million MT, surpassing last year by 45,000 MT over the same period (table 5). The area harvested to date is still lagging last year's pace but is more than offset by the higher yield and sucrose recovery, particularly the latter.

As of week 31, the cumulative production of low-polarity sugar amounted to 349,000 MT, already surpassing the 2023/24 total (about 295,000 MT). Mexico technically only needs to produce 298,000 MT of low-polarity sugar, which is equal to 70 percent of the March U.S. Needs (425,127 metric tons) required by the suspension agreements. In its fourth sugar production estimate, CONADESUCA expects that the final 2024/25 low-polarity sugar production to be at 444,649 MT. If realized, this number implies that there would be about 147,000-MT extra inventory of low-polarity sugar. CONADESUCA has acknowledged this volume by specifying a an additional ending stocks line for the "inventory of sugar with polarity of less than 99.2 for exports to the United States" equal to 150,000 MT in its *2024/25 National Sweetener Balance Estimate* that was also published on May 6. Note that the May *WASDE* carried over the same amount for low-polarity sugar inventory for 2025/26.

[6] The title of CONADESUCA's May 6 publication is *Fourth Estimate of Sugarcane and Sugar Production for the 2024/25 Harvest* report.

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

	2023/24	2024/25			2025/26
	Final	April (estimate)	May (estimate)	Monthly change	May (forecast)
Beginning stocks	835	1,418	1,418	0	1,081
Production	4,704	4,859	4,811	-48	5,094
Imports	761	189	189	0	142
Imports for consumption	722	164	9	-155	7
Imports for sugar-containing product exports (IMMEX)	40	25	180	155	135
Total supply	6,300	6,466	6,418	-48	6,317
Disappearance					
Human consumption	4,127	4,198	4,151	-47	4,151
For sugar-containing product exports (IMMEX)	304	355	463	108	418
Other deliveries and end-of-year statistical adjustment	5	0	0	0	0
Total	4,436	4,553	4,614	61	4,569
Exports	446	957	723	-234	667
Exports to the United States and Puerto Rico	446	425	425	0	572
Exports to other countries 1/	0	532	298	-234	94
Total use	4,882	5,510	5,337	-173	5,236
Ending stocks	1,418	956	1,081	125	1,081
Domestic	1,418	956	931	-25	931
United States 2/	N/A	N/A	150	N/A	150
Stocks-to-human consumption (percent)	34.4	22.8	26.0	3.3	26.0
Stocks-to-use (percent)	29.0	17.3	20.3	2.9	20.7
High-fructose corn syrup (HFCS) consumption (dry weight)	1,599	1,570	1,570	0	1,570

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

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

1/ Includes exports participating in the U.S. re-export programs.
2/ Starting in May 2025, a new line for "sugar inventory with polarity of less than 99.2 for exports to the United States" is 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.

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 31, fiscal years 2023/24 and 2024/25

	Through week 31		Difference		Difference versus	
	2023/24	2024/25	Level	Percent	Level	Percent
Area harvested (1,000 ha)	661	649	-12	-2	622	2276
Sugarcane processed (1,000 MT)	42,709	42,025	-683	-2	39,791	1781
Sugarcane yield (MT per ha)	64.6	64.7	0.1	0	-17.2	-21
Extraction rate (percent)	10.2	10.5	0.3	3	1.9	22
Agro-industrial yield (MT sugar per ha)	6.6	6.8	0.2	3	-0.3	-4
Sugar production (1,000 metric tons)	4,351	4,397	45	1	-535	-11
By type:						
Refinada	1,007	868	-139	-14	-261	-23
Estándar	3,006	3,124	118	4	41	1
Blanco especial	53	56	3	5	-54	-49
Mascabado	3	0	-3	N/A	-10	N/A
Polarity less than 99.2	282	349	67	24	-251	-42

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 Sugar Exports to the United States in 2025/26 Are Expected To Be Larger

Mexico's 2025/26 sugar exports to the United States are projected at 572,000 MT, 147,000 MT or 35 percent larger than 2024/25. The 572,000-MT level will achieve a 13.5-percent stocks-to-use ratio on the U.S. 2025/26 balance sheet if the U.S. additional specialty refined TRQ (which is mostly comprised of organic sugar) would equal that of 2024/25 (about 231,000 STRV) and be announced before the July *WASDE*[7]. The 572,000-MT volume is attainable given the outlook for sugar-production recovery and a 150,000-MT carry-in stocks of low-polarity sugar that can be exported to the United States during October–December 2025, when harvest is just starting.

Mexico's 2024/25 sugar exports to other countries—residually calculated in the *WASDE* balance sheet—are lowered from last month by 234,000 MT to 298,000, which closely matches the actual exports reported by CONADESUCA in its *National Sugar Balance Accumulated, as of March 2025* report. The *WASDE* can adjust accordingly if more exports to non-U.S. destinations are officially recorded in the succeeding months

[7] The U.S. Department of Commerce, per the suspension agreements, will calculate the initial 2025/26 U.S. Needs using the July 2025 *WASDE*.

Mexico’s 2024/25 Total Imports Are Unchanged But The Composition Is Changed; Lowered for 2025/26

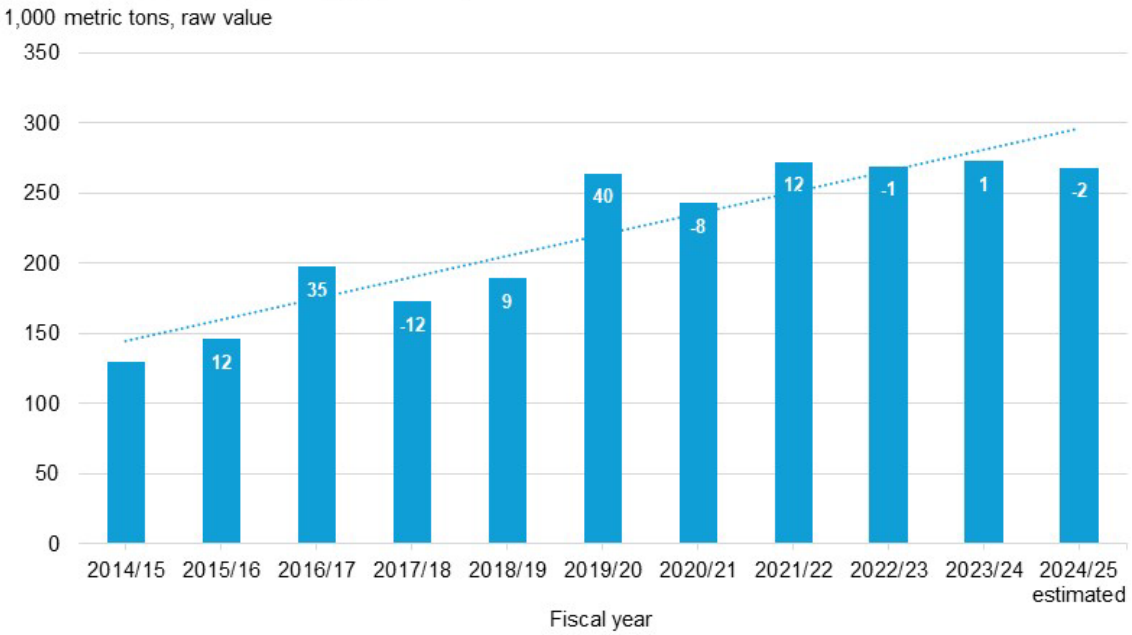
Imports for 2024/25 are estimated at 189,000 MT (unchanged from last month) and projected lower for 2025/26 at 142,000 MT, given the relatively ample domestic supply. For both years, *WASDE* adjusted the expected apportionment of the total imports towards the Industria Manufacturera, Maquiladora y de Servicios de Exportación (IMMEX) products re-export program that is utilized by Mexico-based manufacturing companies. Correspondingly, *WASDE* recognized that imports into these IMMEX facilities have been constituting an increasing share of domestic deliveries (up 108,000 MT this month to 463,000), along with increased use of high-fructose corn syrup.

U.S. Organic Sugar Sources

This section updates the May 2024 *Sugar and Sweeteners Outlook* report on the sources of U.S. organic sugar supply. The domestic organic sugar production in Florida is combined with organic sugar imports, using the applicable Harmonized Tariff Schedule (HTS) codes[8] to determine the supply. The major import sources include the World Trade Organization (WTO) refined (specialty) sugar tariff-rate quota (TRQ) and the over-quota certified organic imports paying a high duty (figure 9, table 6). In the last 5 years, these 2 categories comprised 85 percent of the total supply. The other important supply sources include raw organic sugar imported under the WTO raw sugar TRQ and certified organic imported through Free Trade Agreements (FTA).

Figure 9

U.S. total organic sugar supply, fiscal years 2014/15–2024/25



Note: The dashed blue line represents the trend line. The numbers on top of the bars represent annual growth rates (percent).

Source: USDA, Foreign Agricultural Service calculations using data from Euromonitor; U.S. Department of Homeland and Security, Customs and Border Protection; and U.S. Department of Commerce, Bureau of the Census.

In fiscal year (FY) 2023/24, the U.S. organic sugar supply totaled 272,900 metric tons, raw value (MTRV), reflecting a 1.4 percent growth from 2022/23 as the reduction in raw organic sugar entered under the raw WTO TRQ was more than offset by the increase in other sources. In 2024/25, the U.S. organic sugar supply is estimated at about 268,100 metric tons (MT), down 2

[8] The U.S. International Trade Commission's HTS codes for organic sugar are: 1701.14.10.20 Raw organic sugar, certified organic (in-quota) established on January 1, 2020; 1701.99.10.15 Specialty sugars, certified organic (in-quota) established on July 1, 2016; and 1701.99.50.15 Specialty sugars, certified organic (over-quota) established on January 1, 2020. No HTS code exists for over-quota raw organic sugar imports paying the high duty rate.

percent from 2023/24. This decrease is partly attributed to lower projected FTA and over-quota imports resulting from the 10-percent reciprocal duty implemented on April 5, 2025. Despite this decline, the U.S. organic sugar market has been expanding over the past decade, mainly driven by the growing consumer demand for processed organic products.

Table 6: U.S. organic sugar supply by source, fiscal years 2014/15–24/25

Fiscal year	Domestic 1/	Imports						Total
		Specialty TRQ 2/	Mexico 3/	WTO TRQ raw 2/	WTO TRQ refined 2/	FTA TRQs 2/	Over quota (high tier) 3/	
Volume (metric tons, raw value)								
2014/15	3,000	120,828	0	5,617	0	455	200	130,100
2015/16	3,600	125,628	0	13,130	0	3,066	392	145,816
2016/17	4,392	179,262	0	11,263	0	2,312	200	197,429
2017/18	5,648	160,002	0	6,148	0	595	424	172,818
2018/19	7,748	169,743	0	8,991	0	862	1,800	189,144
2019/20	11,493	168,059	143	22,956	55,000	0	6,393	264,044
2020/21	18,000	178,176	0	28,692	0	3,906	14,182	242,956
2021/22	18,630	199,837	181	18,570	0	2,310	32,684	272,212
2022/23	19,347	201,619	306	18,517	0	3,379	25,956	269,124
2023/24	20,167	210,990	0	7,693	0	4,185	29,865	272,900
2024/25 est.	21,106	210,990	0	12,000	0	2,000	22,000	268,096
Share in total imports (percent)								
2014/15	2	93	0	4	0	0	0	100
2015/16	2	86	0	9	0	2	0	100
2016/17	2	91	0	6	0	1	0	100
2017/18	3	93	0	4	0	0	0	100
2018/19	4	90	0	5	0	0	1	100
2019/20	4	64	0	9	21	0	2	100
2020/21	7	73	0	12	0	2	6	100
2021/22	7	73	0	7	0	1	12	100
2022/23	7	75	0	7	0	1	10	100
2023/24	7	77	0	3	0	2	11	100
2024/25 est.	8	79	0	4	0	1	8	100
Annual growth rate (percent)								
2014/15	NA	NA	NA	NA	NA	NA	NA	NA
2015/16	20	4	--	134	--	574	96	12
2016/17	22	43	--	-14	--	-25	-49	35
2017/18	29	-11	--	-45	--	-74	112	-12
2018/19	37	6	--	46	--	45	325	9
2019/20	48	-1	100	155	--	-100	255	40
2020/21	57	6	-100	25	-100	--	122	-8
2021/22	4	12	--	-35	--	-41	130	12
2022/23	4	1	69	0	--	46	-21	-1
2023/24	4	5	-100	-58	--	24	15	1
2024/25 est.	5	0	--	56	--	-52	-26	-2

est. = estimated; FTA = free trade agreements, TRQ = tariff-rate quota; NA = not available.

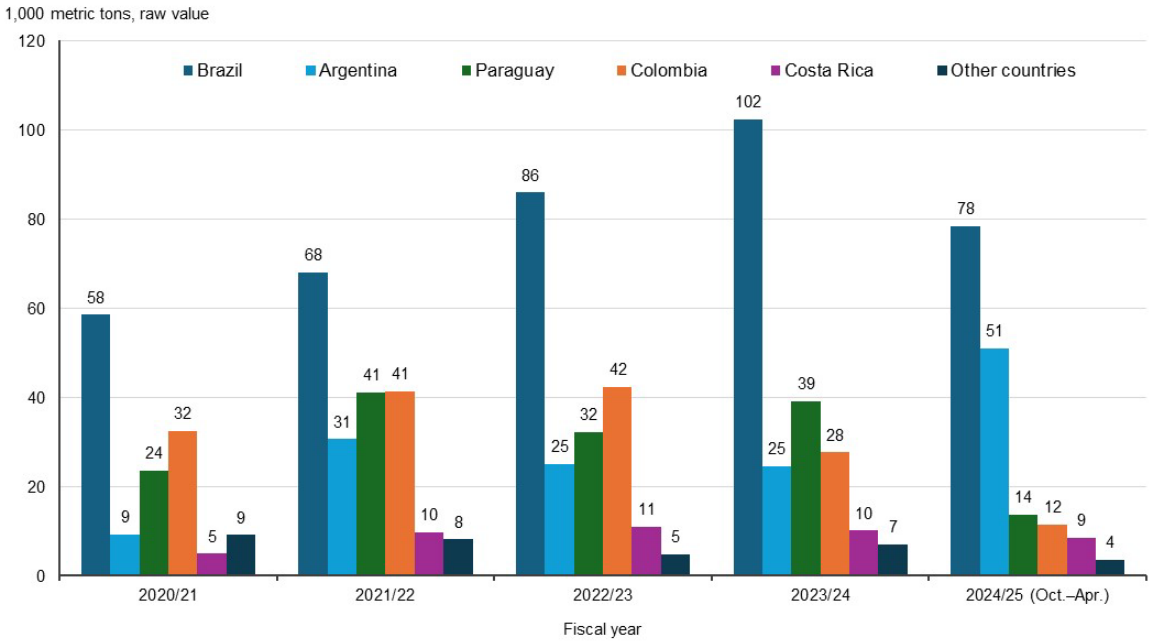
Note: -- = annual growth rate calculation is not applicable due to lack of data.

Source: USDA, Foreign Agricultural Service calculations using data from: 1/ Euromonitor; 2/ U.S. Department of Homeland Security, Customs and Border Protection; 3/ U.S. Department of Commerce, Bureau of the Census.

Specialty sugar tariff-rate quota: Certified organic sugar represents 99 percent of imports under the specialty sugar TRQ. In 2023/24, Brazil supplied 49 percent of the total U.S. certified-organic imports, followed by Paraguay (19 percent), Colombia (13 percent), Argentina (12 percent), and Costa Rica (5 percent) (figure 10). The top 10 U.S. ports of entry for certified-organic sugar accounted for 90 percent of specialty-certified organic imports, up 5 percentage points from 2022/23 (figure 11). The top 3 ports for U.S. certified organic imports contributed 56 percent of the total entries in the last 5 years (Houston, TX; New York, NY/Newark, NJ; Stockton, CA). Between 2022/23 and 2023/24, the biggest year-over-year increase in shares are observed in these ports: San Francisco, CA; Baltimore, MD; and Philadelphia, PA.

Figure 10

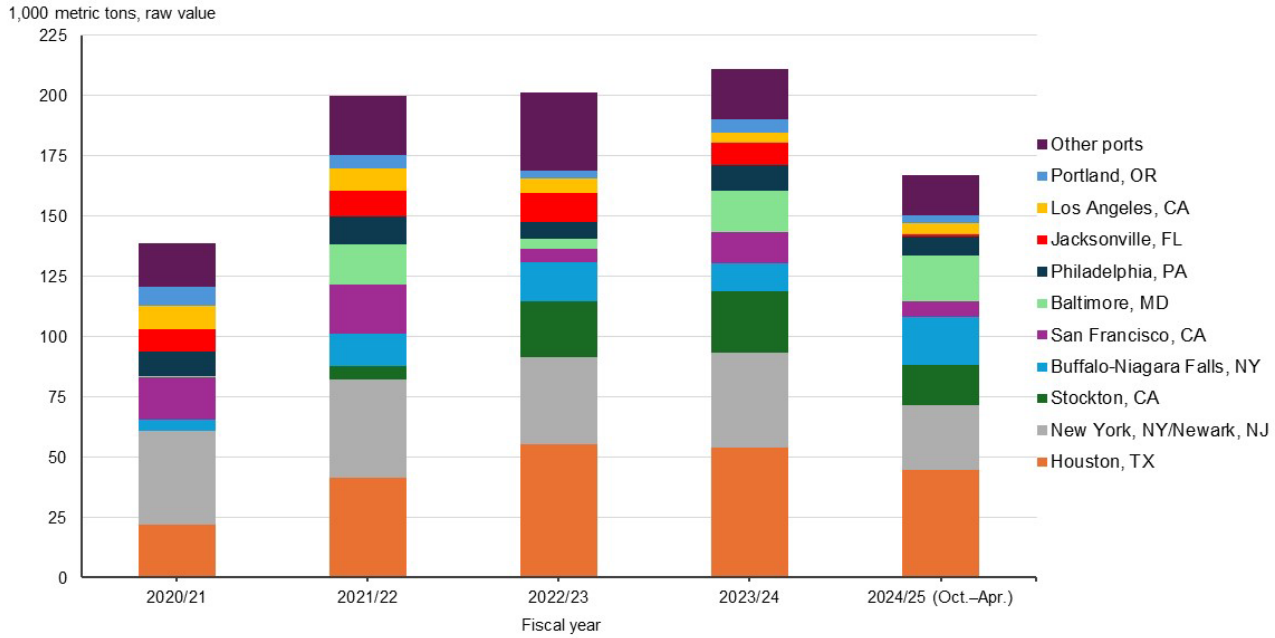
U.S. imports of certified-organic sugar under the specialty sugar tariff-rate quota, by country, fiscal years 2020/21–2024/25



Source: USDA, Foreign Agricultural Service calculations using data from U.S. Department of Homeland Security, Customs and Border Protection.

Figure 11

U.S. imports of certified-organic sugar under the specialty sugar tariff-rate quota, by port of entry, fiscal years 2020/21–2024/25



Source: USDA, Foreign Agricultural Service calculations using data from U.S. Department of Homeland Security, Customs and Border Protection.

Over-quota organic sugar: In 2023/24, the United States imported about 30,000 MT of high-tier certified-organic sugar, primarily from Brazil (67 percent), followed by Colombia (15 percent), India (9 percent), and Paraguay (8 percent). The top ports of entry are New York, NY (33 percent); San Francisco, CA (15 percent); Houston-Galveston, TX (13 percent); and Tampa, FL (12 percent). While the volume is estimated to decline 26 percent in 2024/25, high-tier organic-sugar imports grew by 42 percent between 2021/22 and 2023/24, the fastest pace among the sources.

WTO raw sugar TRQ: U.S. imports of raw organic sugar entered under the WTO TRQ in 2023/24 totaled 7,700 MT, a 58 percent-reduction from the prior year, and representing about 2 percent of the total organic supply during this period. Paraguay is the major supplier, contributing 65 percent of the 2023/24 total, followed by Colombia and India each with 18 percent share. The 2024/25 volume is expected to rebound to 12,000 MTRV, since year-to-date imports (October 2024–April 2025) already amounted to 10,500 MTRV.

Free trade agreements: U.S. imports of organic sugar under free trade agreement provisions are minimal and are mostly from Colombia. Other origins include Panama and Costa Rica. While all imports under Panama's specialty sugar TRQ (500 MT) enter as non-organic specialty sugar (HTS 1701.99.50.17), refined sugar accounts for more than half of all imports under Costa Rica's specialty sugar TRQ (2,000 MT).

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