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Sugar and Sweeteners Outlook: July 2025

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U.S. 2025/26 Sugar Supply Is Raised and Use Is Lowered; Mexico's 2025/26 Sugar Exports to the United States Are Reduced

The U.S. 2025/26 sugar supply is forecast at 13.808 million short tons, raw value (STRV), up 34,000 STRV from last month, as the decrease in production is more than offset by higher beginning stocks and a slight increase in imports. Beginning stocks are raised mainly due to an 80,000-STRV reduction in the 2024/25 deliveries for human consumption to 12.045 million, based on the persistent slowdown in deliveries through May. The weak delivery pace is expected to continue into the next fiscal year, thus the 2025/26 forecast for food use deliveries is lowered by 165,000 STRV to 11.960 million. The 2025/26 additional refined specialty tariff-rate quota (TRQ), which historically was filled by organic sugar imports, was not announced by USDA at the time of the *World Agricultural Supply and Demand Estimates* (WASDE) report. Thus, high-tier tariff refined sugar imports are raised by 236,000 STRV on the assumption that organic sugar would still enter paying the high duty in the absence of this TRQ. Sugar imports from Mexico are set at 439,275 STRV—229,650-STRV lower than last month's 668,925—based on the suspension agreements' U.S. Needs formula to achieve a U.S. 13.5-percent stocks-to-use ratio. Formulaically, the lower amount of sugar imports from Mexico are due to the larger beginning stocks and lower food use deliveries, since the unannounced additional specialty TRQ was already accounted for in the 668,925-STRV calculation.

Mexico's 2025/26 sugar production is unchanged from last month at 5.094 million metric tons, a 7-percent recovery from the weather-affected 2024/25 campaign. Supply in 2025/26 is raised on larger beginning stocks, mainly due to lower 2024/25 use. The reduction of sugar exports to the United States in 2025/26 is offset by a larger projected exports outside of the suspension agreements' export license system, which are mostly to other countries.

U.S. Sugar Outlook

U.S. 2025/26 Sugar Production Is Lowered

U.S. domestic sugar production for 2025/26 is projected at 9.195 million STRV, down 59,000 STRV from last month, on decreases to beet and cane sugar production (table 1). Beet sugar output is lowered by 53,000 STRV to 5.097 million STRV, a 225,000-STRV reduction (4 percent) from 2024/25, solely on lower area planted and harvested reported in the National Agricultural Statistics Service (NASS) June 30 *Acreage* report. The national sugarbeet yield is unchanged at 31.674 tons per acre, which is modeled as a function of NASS planting progress for the four largest sugarbeet-growing U.S. States (Minnesota, North Dakota, Idaho, and Michigan) through week 18 and week 19. NASS will release its initial sugarbeet yield forecast in its August 11 *Crop Production* report.

U.S. cane sugar output for 2025/26 is lowered by 6,000 STRV to 4.098 million, solely on downward adjustment for Florida to 2.010 million STRV, following the processors' projections submitted to USDA, Farm Service Agency's *Sweetener Market Data (SMD)* report. Despite the reduction, both the U.S. and Florida cane sugar production reflect year-over-year increases. Louisiana is unchanged at 2.088 million STRV, implying 6 consecutive years of growth and 4 years of surpassing Florida.

Western Sugar Joined National Sugar Marketing

On July 9, National Sugar Marketing (NSM) emailed customers that Western Sugar (Western) has joined its marketing cooperative, along with current members Amalgamated Sugar Company (Amalgamated) and Southern Minnesota Beet Sugar Cooperative (SMBSC). NSM noted that this development will expand its geographical reach and thus "strengthen its ability to serve customers with improved logistical efficiencies and enhanced economies of scale". Western Sugar has four facilities that process sugar beets grown in Colorado, Nebraska, Wyoming, and Montana. Amalgamated has three factories for beets grown in Idaho, Oregon, and Washington. SMBSC has one factory in Renville, Minnesota and one in Brawley, California which will close after the current beet campaign is completed (see the May 2025 Sugar and Sweeteners Outlook footnote 1 for a brief description of the closure of Spreckels Sugar factory in Brawley).

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

	2023/24	2024/25			2025/26		
	Final	June (estimate)	July (estimate)	Monthly change	June (forecast)	July (forecast)	Monthly change
Beginning stocks	1,843	2,131	2,131	0	2,045	2,132	87
Total production	9,313	9,291	9,295	4	9,254	9,195	-59
Beet sugar	5,172	5,318	5,322	4	5,150	5,097	-53
Cane sugar	4,141	3,973	3,973	0	4,104	4,098	-6
Florida	2,079	1,929	1,929	0	2,016	2,010	-6
Louisiana	2,022	2,045	2,045	0	2,088	2,088	0
Texas 1/	40	0	0	0	0	0	0
Total imports	3,840	2,953	2,956	3	2,474	2,481	6
Tariff-rate quota imports	1,788	1,533	1,533	0	1,419	1,419	0
Other program imports	300	200	200	0	200	200	0
Non-program imports	1,752	1,220	1,224	3	855	861	6
Mexico	521	497	497	0	669	439	-230
High-tier tariff/other	1,231	724	727	3	186	422	236
High-tier tariff	1,176	669	672	3	131	367	236
Raw sugar	887	319	320	1	0	0	0
Refined sugar	289	350	352	3	131	367	236
Other 2/	55	55	55	0	55	55	0
Total supply	14,995	14,375	14,382	7	13,773	13,808	34
Total exports	249	100	100	0	100	100	0
Miscellaneous	81	0	0	0	0	0	0
Total deliveries	12,534	12,230	12,150	-80	12,230	12,065	-165
Domestic food and beverage	12,428	12,125	12,045	-80	12,125	11,960	-165
Sugar-containing products re-export program	83	80	80	0	80	80	0
Polyhydric alcohol, feed, other alcohol	23	25	25	0	25	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0	0	0
Total use	12,864	12,330	12,250	-80	12,330	12,165	-165
Ending stocks	2,131	2,045	2,132	87	1,443	1,643	199
Private	2,131	2,045	2,132	87	1,443	1,643	199
Commodity Credit Corporation	0	0	0	0	0	0	0
Stocks-to-use ratio (percent)	16.6	16.6	17.4	0.8	11.7	13.5	1.8

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.

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

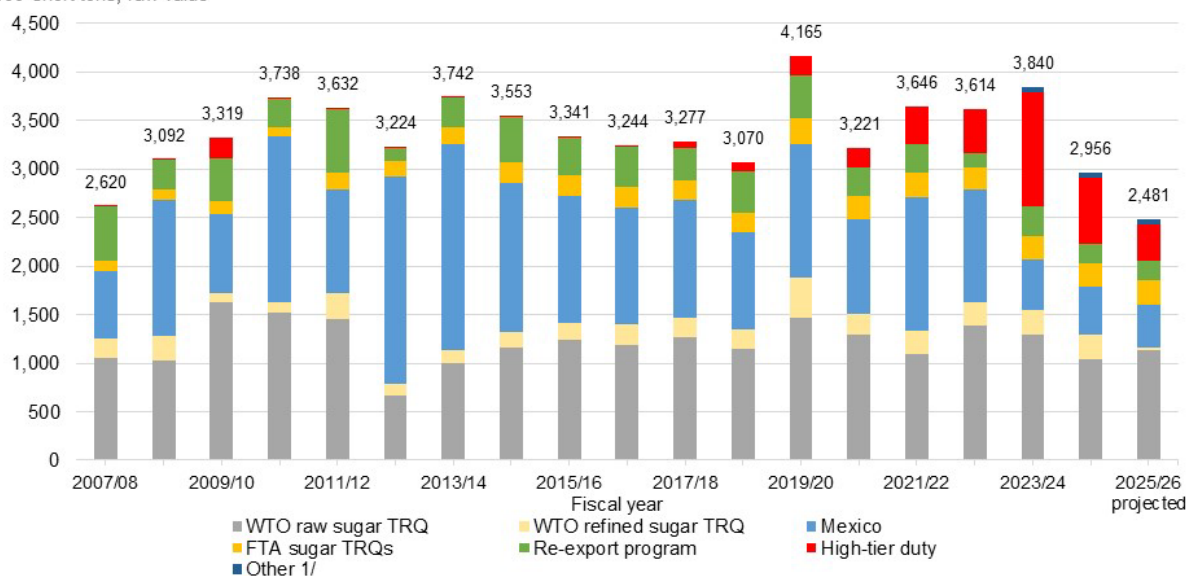
U.S. 2025/26 sugar imports are slightly raised from last month by 6,000 STRV to 2.481 million STRV, as the 236,000-STRV increase in high-tier tariff imports more than offsets the 229,650-STRV reduction in imports from Mexico. The 2.481-million STRV import volume, which is about 500,000 STRV lower (16 percent) than 2024/25, reflects 2 consecutive years of decline in

sourcing foreign sugar, and would be the lowest import volume since 2007/08 (figure 1).

Figure 1

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

1,000 short tons, raw value



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.

The additional refined specialty sugar TRQ¹ for 2025/26, which historically was filled by organic sugar imports², was not announced by USDA at the time of the *World Agricultural Supply and Demand Estimates (WASDE)* report³. Organic sugar serves a particular niche as an ingredient for organic food products. Thus, the July 2025 *WASDE* projects that as much as 200,000 metric tons (235,895 STRV⁴) of sugar—about the same level as the 2024/25's 231,000 STRV (figure 2)—would likely enter the United States paying the high duty for refined sugar (16.31 cents per pound) in the absence of this additional specialty TRQ. As a result, imports of high-tier duty refined sugar

¹ The minimum amount to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreements, is 22,000 metric tons, raw value (MTRV), of which 20,344 MTRV is established for any sugars, syrups and molasses, and 1,656 MTRV is reserved for specialty sugar. The additional refined specialty sugar TRQ is above the 1,656-MTRV minimum commitment.

² Organic sugar is produced domestically in Florida and averaged about 22,000 STRV (20,000 MTRV) between 2022/23–2024/25. For more details, see the May 2025 SSO's section on U.S. organic sugar sources.

³ On July 14, USDA announced no additional refined specialty sugar TRQ; the announcement was published in the Federal Register on July 17.

⁴ The conversion from metric tons to STRV is as follows: 200,000 metric tons x 1.07 x (2204.6225/2000) = 235,895 STRV.

into the United States are raised by the same magnitude (235,895 STRV) from last month to about 367,000 STRV.

Figure 2

U.S. imports of additional specialty refined tariff-rate quota sugar, 2013/14–2025/26

1,000 short tons, raw value

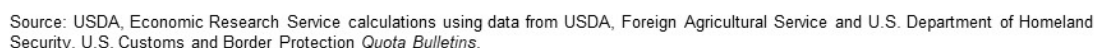


Note: The United States' minimum World Trade Organization (WTO) commitment for specialty sugar quota every fiscal year is 1,825 short tons, raw value or 1,656 metric tons, raw value.

Source: USDA, Economic Research Service calculations using data from USDA, Foreign Agricultural Service and from the Office of the Federal Register's *Federal Register*.

The fifth and last tranche of the 2024/25 additional refined specialty TRQ of 49,604 STRV (45,000 metric tons, raw value or MTRV) opened on July 14. The fill rate was not published on the U.S. Customs and Border Protection *Quota Bulletins* at the time of this Outlook's publication, but the 2024/25 fourth tranche's oversubscribed volume—the amount of sugar exceeding the allowed pro-rata allocation and likely remains in bond in the United States—was around 157,000 STRV (figure 3). In recent years (2021/22–2023/24), the final tranche averaged about 126,000 STRV.

U.S. specialty sugar tariff-rate quota and oversubscription, by tranche, fiscal years 2015/16–2024/25



⁵ The May *WASDE's* forecast for U.S. sugar imports from Mexico (668,925 STRV) was carried over to the June *WASDE*.

Table 2: Comparison of forecast of U.S. sugar imports from Mexico in the WASDE and U.S. Needs calculation by the U.S. Department of Commerce, fiscal year 2022/23–2025/26

	Imports from Mexico in the WASDE report 1/	U.S. Needs 2/	Percent to derive Export Limit 3/	(U.S. Needs) x (Percent)	Less than or equal to previous calculation	Export Limit 4/
Unit is STRV except where percent is noted						
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
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
April 2024 (final adjustment) 5/	498,644	N/A	N/A	N/A	N/A	565,505
2024/25						
July 2024	789,925	789,925	50	394,963	N/A	394,963
September 2024	394,963	306,175	70	214,322	Yes	394,963
December 2024	620,925	620,925	80	496,740	No	496,740
March 2025	496,740	305,075	100	305,075	Yes	496,740
2025/26						
July 2025	439,275	439,275	50	219,638	N/A	219,638

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

1/ Imports from Mexico in the WASDE report can differ from U.S. Needs (i.e., December 2023 and March 2024) because the former's projection takes into account the production capacity of Mexico's mills particularly in producing low polarity sugar for exports to the United States; the latter is strictly based on the U.S. Needs formula specified in the U.S.-Mexico sugar suspension agreements.

2/ Per the suspension agreements, U.S. Needs is "calculated based on information in the WASDE report published by USDA" and is equal to (Total Use * 1.135) - Beginning Stocks - Production - TRQ Imports - Other Program Imports - (Footnote 5 for "other high tier" + "other"). Starting in the May 2022 WASDE, footnote 5 was changed to "High-tier tariff/other" and was assigned its own row.

3/ The suspension agreements define Export Limit as "the quantity of Mexican Sugar permitted to be exported, based on the Date of Export, during a given Export Limit Period".

4/ The Export Limit in the current period cannot be set lower than the prior period.

5/ While the Export Limit cannot be set lower than the prior period, due to Mexico's weather-affected crop, on April 16, 2024, the U.S. Department of Commerce reduced the final 2023/24 Mexico's Export Limit to 565,505 STRV to align it with the amount of sugar that the Government of Mexico reports that Mexico is able to supply.

Source: U.S. Department of Commerce (DOC) ACCESS repository using case number C-201-846; USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (WASDE) report.

Table 3: Comparison of U.S. Needs calculation between the *World Agricultural Supply and Demand Estimate (WASDE)* report in May and July 2025

	May WASDE	July WASDE	Difference
1000 short tons, raw value			
U.S. Needs^{1/}	668.925	439.275	-229.650
Total Use * 1.135	14,023	13,807	-216
Less:			
Beginning stocks	2,032	2,132	100
Production	9,285	9,195	-90
Total imports without Mexico:	2,037	2,041	4
TRQ imports	1,419	1,419	0
Adjustment factor: includes additional specialty assumed equal to 2024/25	231	0	-231
Other program imports	200	200	0
High-tier tariff/other	186	422	236
Raw high-tier	0	0	0
Refined high-tier	131	131	0
Additional specialty	0	236	236
Other (cane molasses)	55	55	0

1/ Per the suspension agreements, U.S. Needs is “calculated based on information in the WASDE report published by USDA” and is equal to (Total Use * 1.135) - Beginning Stocks - Production - TRQ Imports - Other Program Imports - (Footnote 5 for “other high tier” + “other”). Starting in the May 2022 WASDE, footnote 5 was changed to “High-tier tariff/other” and was assigned its own row.

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

U.S. Sugar Deliveries for Human Consumption Are Reduced For 2024/25 and 2025/26

U.S. 2024/25 sugar deliveries for food and beverage use are reduced from last month by 80,000 STRV to 12.045 million STRV, reflecting a year-over-year reduction of about 380,000 STRV or 3 percent (figure 4). This decrease is based on the persistent slowdown in deliveries through May for all the three entities (beet processors, cane refiners, non-reporters) (table 4) and on the expectation that the pace will not significantly pick up for the rest of this fiscal year.

In addition, the weak pace is forecast to continue into the next fiscal year. As such, the 2025/26 sugar deliveries for food use reflects the incorporation of projected deliveries between October–December 2025 that are decreased by 3 percent, relative to the same period in 2024; plus the deliveries between January–April 2026 projected to equal the actual deliveries over the same period in 2025; plus the deliveries between May–September 2026 that are projected to decrease by 3 percent relative to the same period in 2024. The result is a 2025/26 forecast for food use sugar deliveries of 11.960 million STRV, down 165,000 STRV from last month and an 85,000-STRV (0.7 percent) from 2024/25. If realized, the 11.960-million STRV projection

reflects a 3-year consecutive decline and would be the lowest since 2015/16.

Sugar deliveries have slowed 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.

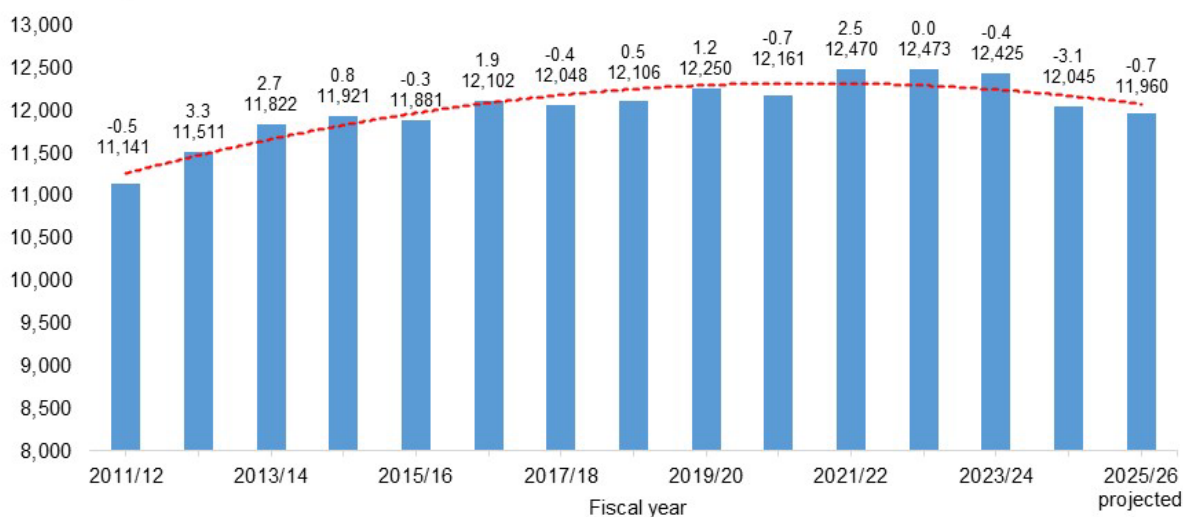
The sluggishness in the 2024/25 sugar deliveries amid relatively large domestic production, in addition to large carryover stocks from 2023/24 (2.131 million STRV), contribute to a second consecutive year of high inventory in 2024/25 at the same level (2.132 million STRV) (figure 5). The estimated 2.132 million-STRV of sugar ending stocks in 2024/25 translates to a stocks-to-use ratio of 17.4 percent, the highest since 2012/13 (17.9 percent).

As of May 31, total sugar ending stocks (4.768 million STRV) reported in the *SMD* are the highest for this month since 2013/14 (figure 6). Refiners' refined cane sugar stocks (537,000 STRV) remain above record high level (figure 7), while beet processors' total stocks including stocks held for others (2.226 million STRV) and the raw cane sugar stocks held jointly by cane refiners and processors (2.004 million STRV) are at or near record (figures 8,9).

Figure 4

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

1,000 short tons, raw value



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

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

Table 4: U.S. cumulative sugar deliveries for food and beverage use by component, October–May, 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	3,280	3,184	3,174	3,248	-10	0
Cane sugar refiners	4,340	4,515	4,348	4,298	-167	-4
Total reporters	7,621	7,698	7,522	7,546	-176	-2
Non-reporters (direct consumption)	665	488	415	628	-72	-15
Total	8,286	8,186	7,937	8,174	-249	-3
Percent share in total					Percentage points	
Beet sugar processors	39.6	38.9	40.0	39.7	1.1	N/A
Cane sugar refiners	52.4	55.1	54.8	52.6	-0.4	N/A
Total reporters	92.0	94.0	94.8	92.3	0.7	N/A
Non-reporters (direct consumption)	8.0	6.0	5.2	7.7	-0.7	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.

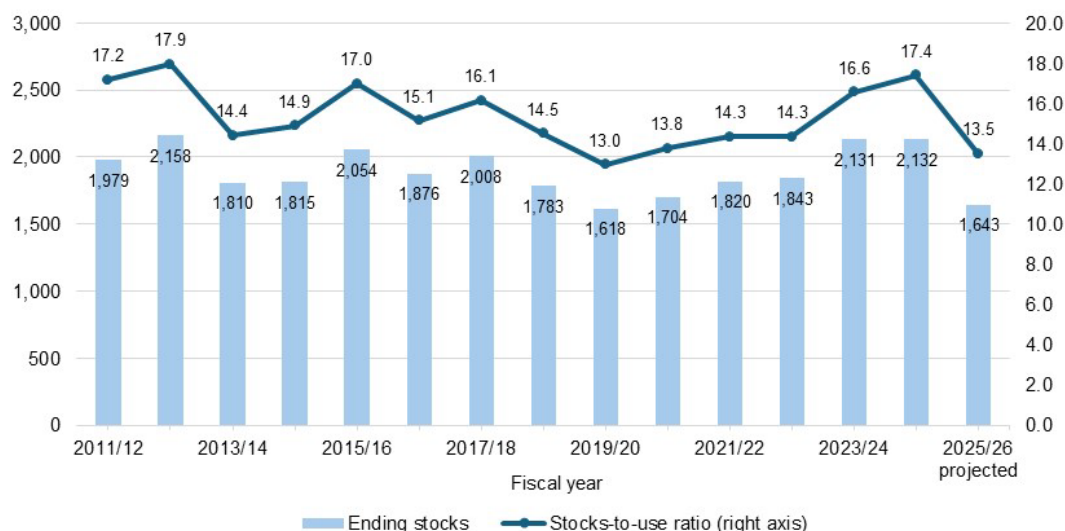
1/ 5-year average includes 2019/20–2023/24.

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

Figure 5

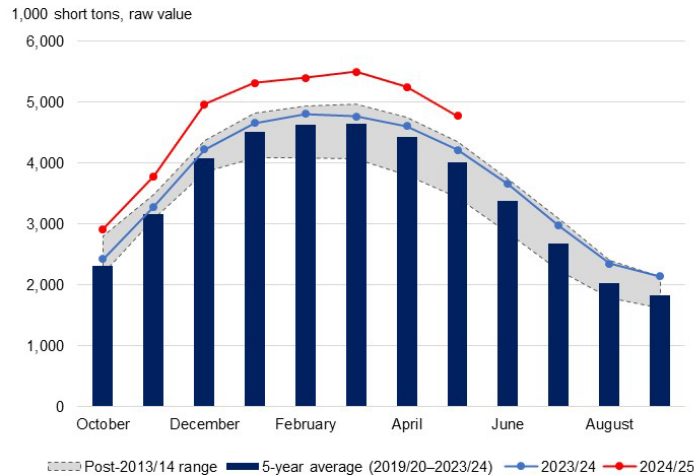
U.S. sugar stocks and stocks-to-use ratio, 2011/12–2025/26

1,000 short tons, raw value



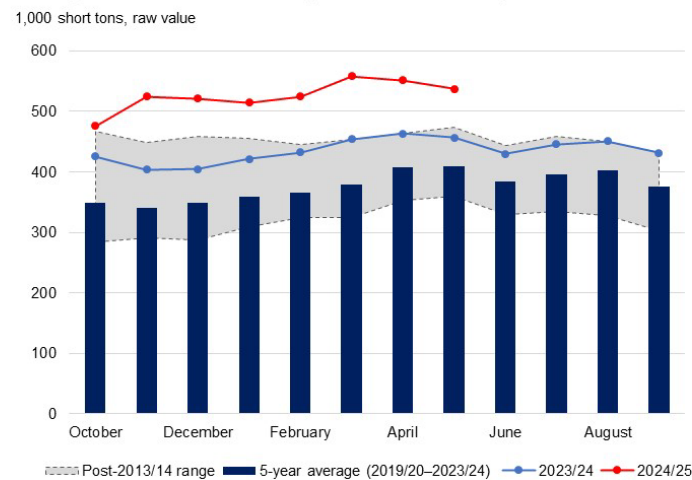
Source: USDA, Economic Research Service calculations using data from USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* report and USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 6
U.S. total sugar ending stocks, monthly, 2013/14–2024/25



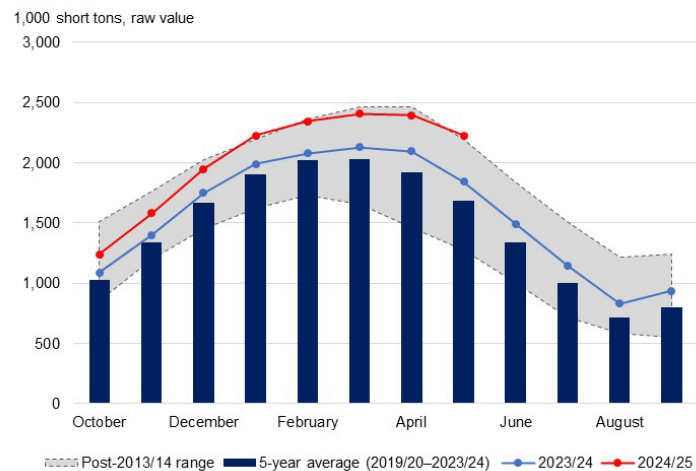
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 7
U.S. sugarcane refiners' refined sugar inventories, monthly, 2013/14–2024/25



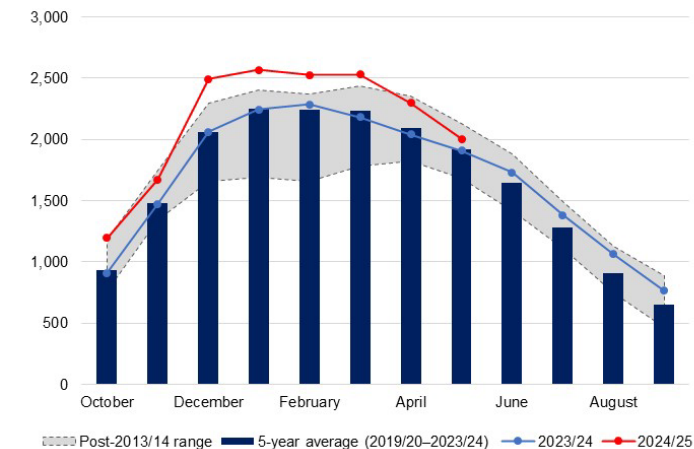
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 8
U.S. 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 9
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 2025/26 Sugar Balance Sheet Is Mostly Unchanged

Mexico's 2025/26 beginning sugar stocks are increased from last month by 27,000 metric tons, actual weight (MT) to 1.098 million, due to a lower use estimate in the 2024/25 balance sheet (table 5). Mexico's 2024/25 domestic sugar deliveries are reduced by 94,000 MT, based on slower-than-expected pace (partly due to competition from lower priced high-fructose corn syrup imports), which more than offset a 63,000-MT increase in exports outside of the suspension agreements and a 4,000-MT decrease in production. The 2025/26 decrease for Mexico's sugar exports destined to the United States (197,000 MT) is counterbalanced by a 224,000-MT increase in exports outside of the of the suspension agreements' export license system (mostly to other countries). Mexico's sugar exports to other countries are residually determined to maintain a reasonable Mexican stocks-to-domestic-consumption ratio, and thus, total sugar exports are raised by the same 27,000-MT increase in beginning stocks.

Mexico's 2025/26 sugar production is unchanged from last month at 5.094 million metric tons, a 7-percent recovery from the weather-affected 2024/25 campaign. The 2025/26 forecast is based on the April 2025 USDA, Foreign Agricultural Service (FAS) Mexico City *Sugar Annual* report, which projects the 2025/26 area harvested at 760,000 hectares, sugarcane yield at 64.2 MT per hectare, and sucrose factory recovery at 10.44 percent.

Mexico's 2024/25 Sugar Production Is Slightly Adjusted, As The Harvest Campaign Ends

Mexico's 2024/25 sugar production is slightly adjusted downwards from last month by 4,000 metric tons (MT), actual weight to 4.770 million, as the harvest campaign nears completion. Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) reported that as of July 5 (week 40), 45 of the 47 mills have finished their harvest campaign (table 6).

Cumulative sugar production totaled 4.768 million MT, surpassing last year by 66,000 MT (1 percent) over the same period. The area harvested to date lagged at last year's pace but is more than offset by the higher yield and sucrose recovery, particularly the latter.

Cumulative production of sugar with less than 99.2 polarity—produced exclusively for export to the United States—totaled 456,507 MT, which is more than 50 percent over last year's output

(292,839 MT) and has surpassed CONADESUCA's fourth estimate (444,639 MT)⁶. This 456,507-MT sugar volume is greater than the 297,589-MT requirement (March U.S. Needs of 425,127 MT x 70 percent) per the suspension agreements. Thus, there would be roughly 150,000-MT extra inventory of low-polarity sugar.

CONADESUCA has acknowledged this extra low polarity output by specifying an additional ending stocks line for the "inventory of sugar with polarity of less than 99.2 for exports to the United States" equals to 150,000 MT in its fifth iteration of *2024/25 National Sweetener Balance Estimate* published on June 30. This 150,000-MT sugar volume is reserved for export to the United States between October–December 2025 at the onset of the 2025/26 campaign. Thus, the *WASDE* includes this 150,000-MT of low-polarity sugar inventory in the 2024/25 balance sheet. The same 150,000-MT of extra low polarity sugar inventory is applied in the *WASDE* 2025/26 balance sheet.

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

	2023/24	2024/25			2025/26		
	Final	June (estimate)	July (estimate)	Monthly change	June (forecast)	July (forecast)	Monthly change
Beginning stocks	835	1,418	1,418	0	1,071	1,098	27
Production	4,704	4,774	4,770	-4	5,094	5,094	0
Imports	761	175	175	0	142	142	0
Imports for consumption	722	9	9	0	7	7	0
Imports for sugar-containing product exports (IMMEX)	40	166	166	0	135	135	0
Total supply	6,300	6,367	6,363	-4	6,307	6,334	27
Disappearance							
Human consumption	4,127	4,151	4,057	-94	4,151	4,151	0
For sugar-containing product exports (IMMEX)	304	402	402	0	418	418	0
Other deliveries and end-of-year statistical adjustment	5	0	0	0	0	0	0
Total	4,436	4,553	4,459	-94	4,569	4,569	0
Exports	446	743	806	63	657	684	27
Exports to the United States and Puerto Rico	446	425	425	0	572	390	-183
Exports to other countries 1/	0	318	381	63	84	294	210
Total use	4,882	5,296	5,265	-31	5,226	5,253	27
Ending stocks	1,418	1,071	1,098	27	1,081	1,081	0
Domestic	1,418	921	948	27	931	931	0
United States 2/	N/A	150	150	0	150	150	0
Stocks-to-human consumption (percent)	34.4	25.8	27.1	1.3	26.0	26.0	0.0
Stocks-to-use (percent)	29.0	20.2	20.9	0.6	20.7	20.6	-0.1
High-fructose corn syrup (HFCS) consumption (dry weight)	1,599	1,570	1,755	185	1,570	1,680	110

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).

⁶ CONADESUCA released its *Fourth Estimate of Sugarcane and Sugar Production for the 2024/25 Harvest* on April 19, 2025.

Table 6: Mexico's cumulative sugar production through week 40, fiscal years 2023/24 and 2024/25

	Through week 40		Difference	
	2023/24	2024/25	Level	Percent
Area harvested (1,000 ha)	742	735	-7	-1
Sugarcane processed (1,000 MT)	46,056	45,711	-345	-1
Sugarcane yield (MT per ha)	62.1	62.2	0.1	0.1
Extraction rate (percent)	10.2	10.4	0.2	2
Agro-industrial yield (MT sugar per ha)	6.3	6.5	0.2	2
Sugar production (1,000 metric tons)	4,702	4,768	66	1
By type:				
Refinada	1,099	935	-165	-15
Estándar	3,245	3,312	68	2
Blanco especial	61	64	3	5
Mascabado	3	0	-3	N/A
Polarity less than 99.2	293	457	164	56

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).

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