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Outlook

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Sugar and Sweeteners Outlook: August 2025

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U.S. 2025/26 Sugar Supply Is Raised; Mexico's 2025/26 Balance Sheet Is Mostly Unchanged

The U.S. 2025/26 sugar supply is forecast at 14.325 million short tons, raw value (STRV). This number is up more than 500,000 STRV from last month, as the increases in beginning stocks and a record-high 9.428 million-STRV domestic production more than offset the reduction in imports under free trade agreement (FTA) tariff-rate quotas (TRQ). Beginning stocks are raised to a 25-year high on a combination of upward adjustment to the 2024/25 supply (record-level beet sugar production, strong pace of imports under the re-export and polyhydric programs, and additional entries of sugar imports paying the high-tier duty) that more than offset the 2024/25 increase in use (larger sugar exports and sugar deliveries for polyhydric alcohol). Given that the 2025/26 sugar use is unchanged at 12.165 million STRV, ending stocks are raised by the same magnitude as that of the supply. The corresponding stocks-to-use ratio is 17.8 percent, up from last month's 13.5 percent, and would be the second largest behind 2024/25 (19.9 percent) since 2012/13, thus reflecting 2 consecutive years of relatively high sugar inventories.

Mexico's 2024/25 sugar supply is slightly increased, with the conclusion of the sugar campaign. Mexico's 2025/26 balance is mostly unchanged, except for a 34,000-metric tons (MT) reduction to beginning stocks. Exports outside of the sugar suspension agreements, which are mostly to countries besides the United States, are residually lowered by the same amount to 274,000 MT, to maintain a reasonable target level for ending stocks. Mexican sugar exports to the United States are unchanged at 375,947 MT. This volume will be recalculated by the U.S. Department of Commerce using next month's *World Supply and Demand Estimates (WASDE)* report to achieve a U.S. stocks-to-use ratio of 13.5 percent according to the provisions of the suspension agreements.

U.S. Sugar Outlook

U.S. Beet Sugar Production Is Raised for Both Years

U.S. beet sugar production for fiscal year 2024/25 is raised from last month by 93,000 STRV to a record 5.415 million, on larger-than-expected volume of sugarbeets sliced (and thus, lower sugarbeet shrink) (tables 1 and 2). The estimate for sucrose recovery from sliced beets is also revised upwards, using data through June, reported by the USDA, Farm Service Agency's *Sweetener Market Data (SMD)*.

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

	2023/24	2024/25			2025/26		
	Final	July (estimate)	August (estimate)	Monthly change	July (forecast)	August (forecast)	Monthly change
Beginning stocks	1,843	2,131	2,131	0	2,132	2,439	307
Total production	9,313	9,295	9,386	91	9,195	9,428	233
Beet sugar	5,172	5,322	5,415	93	5,097	5,266	170
Cane sugar	4,141	3,973	3,971	-2	4,098	4,162	64
Florida	2,079	1,929	1,927	-2	2,010	2,008	-2
Louisiana	2,022	2,045	2,044	-1	2,088	2,154	66
Texas 1/	40	0	0	0	0	0	0
Total imports	3,840	2,956	3,202	246	2,481	2,457	-23
Tariff-rate quota imports	1,788	1,533	1,516	-17	1,419	1,396	-23
Other program imports	300	200	325	125	200	200	0
Non-program imports	1,752	1,224	1,361	137	861	861	0
Mexico	521	497	497	0	439	439	0
High-tier tariff/other	1,231	727	864	137	422	422	0
High-tier tariff	1,176	672	809	137	367	367	0
Raw sugar	887	320	447	127	0	0	0
Refined sugar	289	352	362	10	367	367	0
Other 2/	55	55	55	0	55	55	0
Total supply	14,995	14,382	14,719	337	13,808	14,325	517
Total exports	249	100	125	25	100	100	0
Miscellaneous	81	0	0	0	0	0	0
Total deliveries	12,534	12,150	12,155	5	12,065	12,065	0
Domestic food and beverage	12,428	12,045	12,045	0	11,960	11,960	0
Sugar-containing products re-export program	83	80	80	0	80	80	0
Polyhydric alcohol, feed, other alcohol	23	25	30	5	25	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0	0	0
Total use	12,864	12,250	12,280	30	12,165	12,165	0
Ending stocks	2,131	2,132	2,439	307	1,643	2,160	517
Private	2,131	2,132	2,439	307	1,643	2,160	517
Commodity Credit Corporation	0	0	0	0	0	0	0
Stocks-to-use ratio (percent)	16.6	17.4	19.9	2.5	13.5	17.8	4.2

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

For fiscal year 2025/26, U.S. beet sugar output is up 170,000 STRV to 5.266 million, matching 2017/18 (5.279 million) as the second largest on record behind the 2024/25 estimate. Most of the adjustments are based on the USDA, National Agricultural Statistics Service (NASS) August *Crop Production* report. NASS projected the 2025/26 crop year sugarbeet production at 35.024 million tons. This projection is based on a slightly reduced area harvested of 1,064,600 acres (down from 1,069,000 acres in the June *Acreage* report) and a national yield of 32.9 tons per acre (up from last year's 32.5 tons per acre and from last month's *WASDE* regression-based estimate of 31.7 tons per acre). The 32.9-tons-per-acre yield would be the second largest since 1980/81, behind 2021/22 (33.2 tons). Year-over-year yield increases for most U.S. States, particularly for the major producers (Idaho, Michigan, and Minnesota) more than compensate for the reduced forecast for Colorado, North Dakota, and Nebraska. In addition, the projection for sugarbeet shrink, which is based on a 10-year average (2015/16–2024/25), is slightly lowered to 6.6 percent after the incorporation of the recently reduced 2024/25 shrink.

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

	2023/24 final	2024/25 July	2024/25 August	Monthly change	2025/26 July	2025/26 August	Monthly change
Area planted (1,000 acres) 1/	1,125	1,104	1,104	0	1,087	1,079	-8
Planted/Harvested ratio	0.990	0.983	0.983	0.000	0.983	0.987	0.003
Area harvested (1,000 acres) 1/	1,114	1,086	1,086	0	1,069	1,065	-4
Yield (tons per acre) 1/	32.20	32.50	32.50	0.0	31.7	32.9	1.2
Sugarbeet production (1,000 tons)	35,884	35,278	35,278	0	33,859	35,024	1,165
Sugarbeet shrink (percent)	7.935	8.064	6.724	-1.340	6.761	6.627	-0.134
Sugarbeet sliced (1,000 tons) 2/	33,037	32,433	32,906	473	31,570	32,703	1,133
Sugar extraction rate from slice (percent) 3/	14.742	15.323	15.386	0.063	14.782	14.788	0.006
Sugar from beets sliced (1,000 STRV)	4,870	4,970	5,063	93	4,667	4,836	170
Sugar from molasses (1,000 STRV) 4/	275	340	340	0	400	400	0
Crop year sugar production (1,000 STRV)	5,145	5,310	5,403	93	5,067	5,236	170
Aug.–Sep. sugar production (1,000 STRV)	663	690	690	0	666	666	0
Aug.–Sep. sugar production of next crop (1,000 STRV) 5/	690	666	666	0	666	666	0
Sugar from imported beets (1,000 STRV) 6/	N/A	37	37	0	30	30	0
Fiscal year sugar production (1,000 STRV) 7/	5,172	5,322	5,415	93	5,097	5,266	170

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/ Based on USDA, National Agricultural Statistics Service (NASS).

2/ For 2024/25, based on processors' reporting to Farm Service Agency, *Sweetener Market Data (SMD)* report for August 2024 to June 2025, plus a 5-year average (2019/20–2023/24) for July. For 2025/26 sugarbeet sliced, derived using a 10-year average (2015/16–2024/25) for sugarbeet shrink.

3/ For 2024/25, based on a regression analysis using *SMD* data through June. For 2025/25, based on a 10-year average (2015/16–2024/25).

4/ For 2024/25, based on a 5-year average (2019/20–2023/24). For 2025/26, based on beet processors' increased capacity from capital improvements.

5/ For 2024/25, based on a 5-year average (2019/20–2023/24), which is carried over to 2025/26.

6/ For 2023/24, sugar from imported beets is already included in the final crop year production. For 2024/25, based on *SMD* data. 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.

7/ Fiscal year sugar production = crop year sugar production – August to September sugar production + August to September sugar production of next crop.

Source: USDA, Economic Research Service using USDA, NASS; USDA, FSA *SMD* report; USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates (WASDE)* report.

U.S. Cane Sugar Production Is Slightly Down for 2024/2025; Up for 2025/26

U.S. cane sugar production for fiscal year 2024/25 is slightly revised downwards from last month by 2,000 STRV to 3.971 million (Florida is now at 1.927 million and Louisiana at 2.044 million). The adjustments are based on the final crop year data in the *SMD* since the campaigns for both States have concluded.

For fiscal year 2025/26, domestic cane sugar output is up 64,000 STRV to a record 4.162 million, as a slight reduction for Florida's projection to 2.008 million (based on processors' submission to *SMD*) is more than offset by an increase for Louisiana to a record 2.154 million. The 2,000-STRV reduction for Florida forecast is consistent with USDA, NASS' projection in the August *Crop Production* report indicating lower sugarcane production for the State, from last year's 18.0 million tons to 17.1 million. Despite the reduced projection from last month, Florida cane sugar production is projected to increase year-over-year by 81,000 STRV, or 4 percent, as a larger harvested area and sucrose recovery is expected to compensate for a smaller sugarcane yield.

Louisiana's 66,000-STRV increase to a record 2.154 million, which is also relatively close with the processors' *SMD* submission (2.164 million), is based on the NASS' projection for the State's crop year sugarcane area harvested (for sugar and seed) at 525,000 acres (up from last year's 523,300 acres) and yield at 32.0 tons per acre (up from last years' 31.3 tons). The forecast for Louisiana's sucrose recovery, which is based on a 5-year average, is unchanged (13.48 percent) and early sugar production in September 2025 is maintained to be the same as September 2024 (51,000 STRV). Louisiana's area expansion and relatively consistent sucrose recovery compensate for the State's lower sugarcane yield, relative to Florida. As such, Louisiana's record-high 2.154 million-STRV volume reflects 6 consecutive years of growth and 4 years of surpassing Florida.

U.S. Sugar Imports Are Lowered for 2025/26; Raised for 2024/25

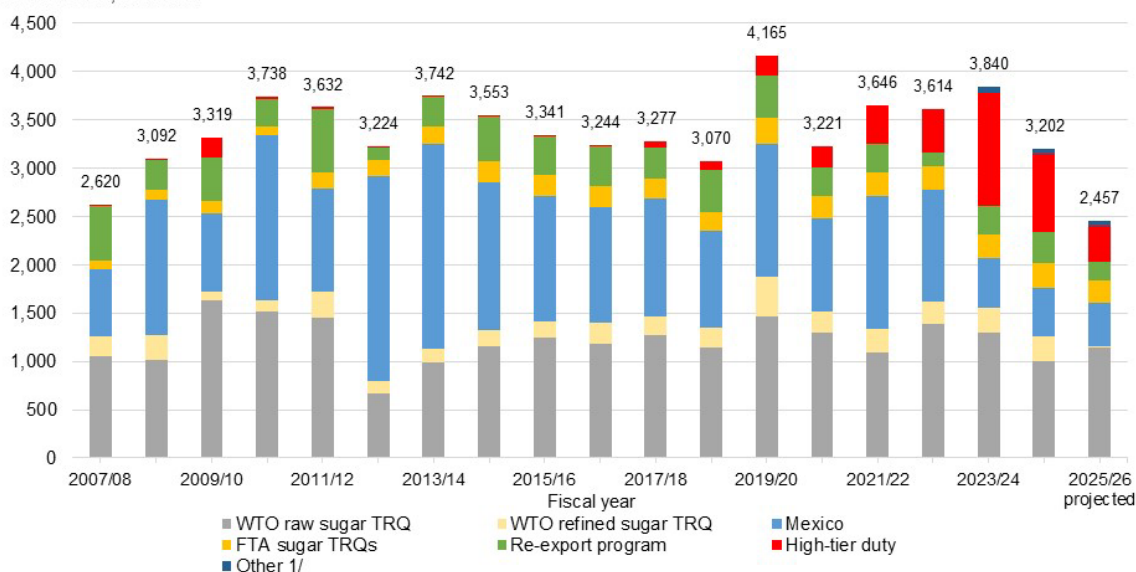
U.S. 2025/26 sugar imports are reduced from last month by 23,000 STRV to 2.457 million, almost 750,000-STRV lower (or 25 percent) than 2024/25 and the lowest in almost two decades (figure 1). The decrease is solely based on a reduction to the calendar-year free trade agreements (FTA) tariff-rate quota (TRQ) imports that are now expected to arrive before October 1. Thus, this volume is instead accounted for in fiscal year 2024/25.

Several adjustments are made to the 2024/25 U.S. sugar imports, which result in a net increase of almost a quarter million tons to 3.202 million STRV. However, this volume remains the second lowest import level behind 2025/26 and reflects 2 consecutive years of declines in sourcing foreign sugar. This month's upward adjustment is mainly driven by the increases for high-tier duty raw sugar imports and re-export sugar imports—both based on pace of entry—that more than offset the decrease in imports entered via the WTO raw sugar TRQ.

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

High-tier tariff imports are raised 137,000 STRV to 864,000—now the second largest source of U.S. imports in 2024/25 behind WTO raw sugar TRQ—based on entries through the first week of August. Most of the increase (127,000 STRV) is for the raw sugar component, which now amounts to 447,000 STRV; the rest is for refined sugar (up 10,000 STRV to 362,000 STRV). Thus, while traditionally comprised of high-value refined sugar that is difficult to source domestically, high-tier raw sugar imports have surged and overtaken the weather-reduced volume of raw sugar imported from Mexico in the last 2 years.

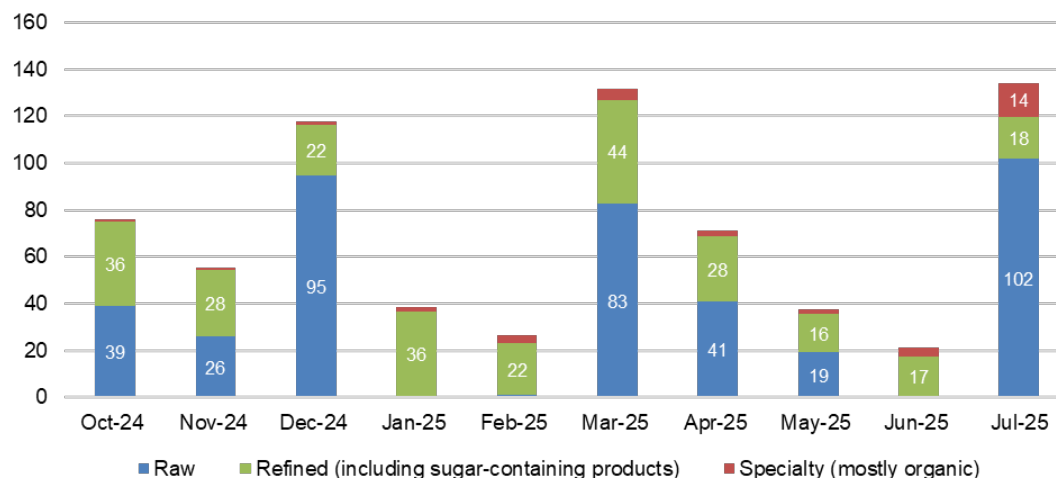
Based on the USDA, Foreign Agricultural Service (FAS) August *U.S. Sugar Monthly Import and Re-Exports*, the highest volume of U.S. high-tier sugar imports for the current fiscal year is entered in July, the majority of which is raw sugar (figure 2). U.S. high-tier specialty sugar imports, which are mostly comprised of organic sugar, also posted the largest entry volume in July. In terms of origin, Brazil is the largest source, along with two Central American countries (Guatemala and El Salvador) (figure 3). In terms of entry location, the top three ports—Savannah, Georgia; San Francisco, California; and Philadelphia, Pennsylvania—are relatively nearby to import-based cane refiners (figure 4).

U.S. imports of 2024/25 WTO raw sugar TRQ are reduced 33,000 STRV to 1.008 million, the lowest since 2014/15. This reduction is due to an increase in the estimated shortfall—which is the difference between quota allocation and actual entry of imports into the United States—from last month's 190,000 STRV to 223,000, also the largest since 2014/15 (figure 5). The increase in the WTO raw sugar TRQ shortfall is mainly for Bolivia, Colombia, India, and Jamaica. The allocation for the top quota-holder Dominican Republic (208,715 STRV) is 90 percent filled and already filled for the next largest holder Brazil (171,953 STRV).

Figure 2

U.S. cumulative imports of high-tier duty sugar, by type, October 2024–July 2025

1,000 short tons, raw value



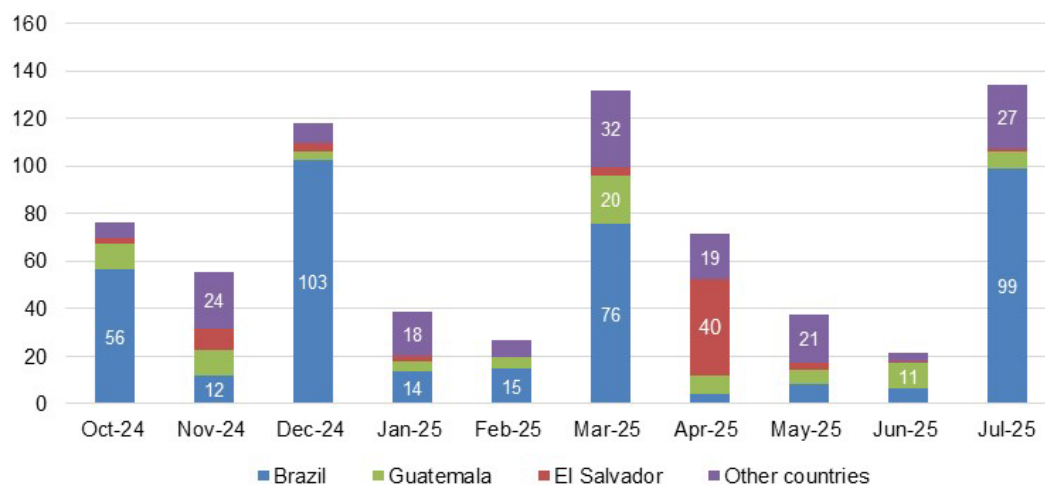
Note: July 2025 data are preliminary.

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

Figure 3

U.S. cumulative imports of high-tier duty sugar, by origin, October 2024–July 2025

1,000 short tons, raw value



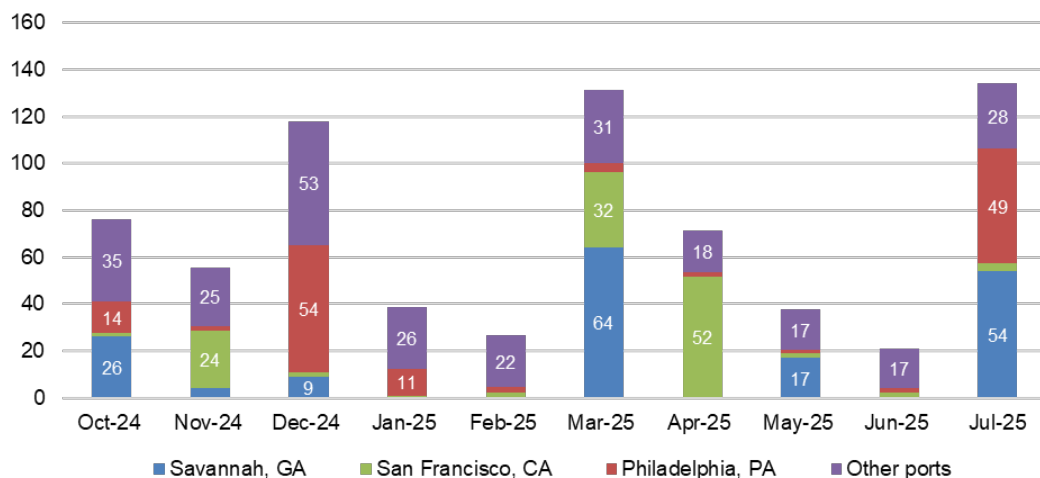
Note: July 2025 data are preliminary.

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

Figure 4

U.S. cumulative imports of high-tier duty sugar, by port of entry, October 2024–July 2025

1,000 short tons, raw value



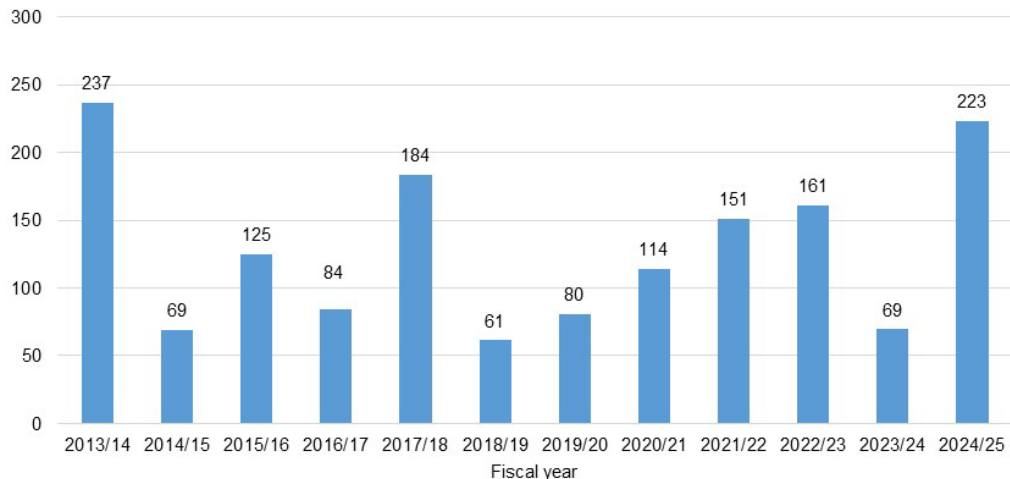
Note: July 2025 data are preliminary.

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

Figure 5

Shortfall in U.S. imports of World Trade Organization raw sugar tariff-rate quota, fiscal year 2013/14–2024/25

1,000 short tons, raw value



Note: Shortfall is the difference between quota allocation and actual entry of imports into the United States.

Source: USDA, Economic Research Service calculations based on data from USDA, Foreign Agricultural Service; U.S. Department of Homeland Security, Customs and Border Protection.

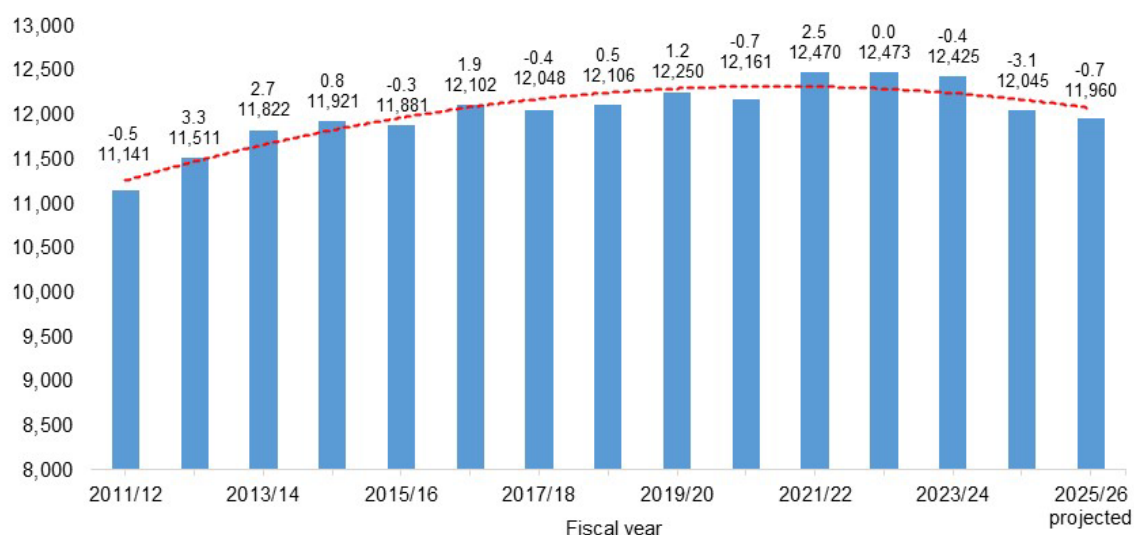
U.S. Sugar Deliveries for Human Consumption for 2024/25 and 2025/26 Are Unchanged

U.S. sugar deliveries for food and beverage use in 2024/25 (12.045 million STRV) and 2025/26 (11.960 million STRV) are unchanged from last month, thus reflecting a 3-year consecutive decline (figure 6).

Figure 6

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.

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.

Through June, sugar deliveries compared to last year (over the same period) continue to lag for cane refiners and non-reporter deliveries, both being down 3 percent. The beet processors' relatively strong pace in May and June propelled their deliveries to date to be on par with last year. The competitive price of beet sugar has helped this sector regain market share.

The bulk refined Midwest beet sugar nominal¹ price for 2024/25 (reported in Sosland Publishing's *Sweetener Market* report) has been decreasing since early 2025, and as of August 13, has been quoted between 35–40 cents per pound. This price range is down 15–18 cents per pound (30 percent) from the 2023/24 refined beet sugar quotes. In addition, refined beet sugar quotes are about 11–16 cents per pound lower than the 2024/25 Northeast refined cane sugar quotes (51 cents per pound), thus the margin is wider than the historical 2–3 cents per pound.

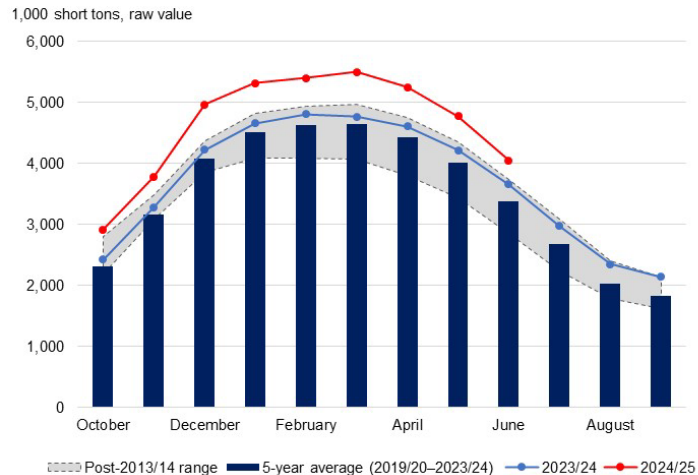
In addition, the nominal refined beet sugar quotes are trending lower than the U.S. raw cane sugar futures (Number 16) for nearby November, which closed at 37.05 cents per pound on August 13. Sosland reported that forward trading prices of refined beet sugar for next year (2025/26) are higher (between 40–42 cents per pound) and noted in a previous report that beet processors consider 40 cents per pound as the breakeven price to cover their production costs.

Despite the higher price quotes compared with refined beet sugar, the current Number 16 raw cane sugar and refined cane sugar prices are also down year over year by around 4 percent and 15 percent, respectively. The drop in the Number 16 is largely influenced by the reduction in the Number 11 world raw cane sugar futures. The reason is partly due to the larger-than-expected Brazilian sugar production and relatively low oil prices that are expected to divert Brazilian sugarcane away from ethanol production into sugar.

The slide in the refined cane sugar prices (as well as that of the refined beet sugar prices) is at the backdrop of persistent sluggishness in deliveries, record domestic production, and large stocks. Based on the *SMD*, ending stocks as of June 30 for both the cane refiners' refined cane sugar (509,000 STRV) and beet processors refined sugar (including stocks held for others) (1.875 million STRV) are both at the highest levels since 2013/14 (figures 8 and 9, respectively). As such, both stock components contribute to record June 30 total sugar ending stocks of 4.042 million STRV.

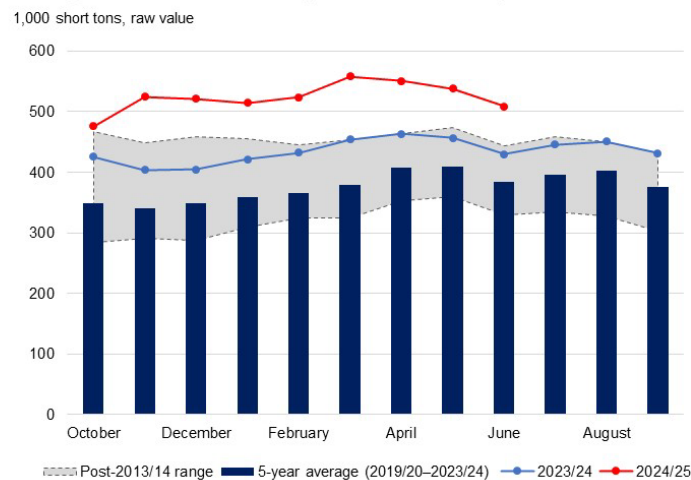
¹ Beginning in its April 30 report, Sosland noted the spot beet sugar market was moved to nominal terms due to the lack of sales.

Figure 7
U.S. total sugar ending stocks, monthly, 2013/14–2024/25



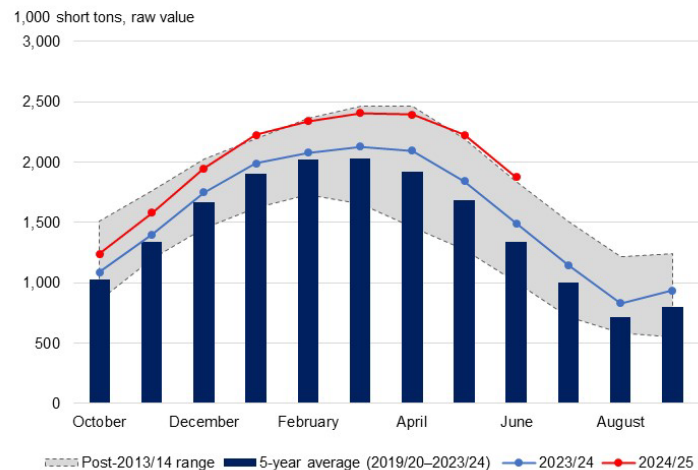
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 8
U.S. sugarcane refiners' refined sugar inventories, monthly, 2013/14–2024/25



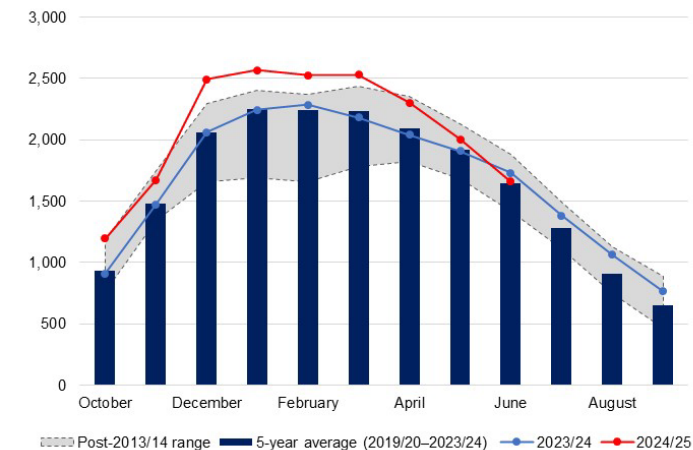
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency *Sweetener Market Data* report.

Figure 9
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 10
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 Campaign Has Concluded

Mexico's 2024/25 sugar supply is slightly increased from last month by 525 metric tons (MT), actual weight to 4.771 million, with the conclusion of the sugar campaign at week 42 (as of July 19), as reported by the National Committee for the Sustainable Development of Sugarcane (CONADESUCA) (table 3). The 4.771 million-MT of sugar (which reflects a 1-percent increase from 2023/24) was produced on about 736,000 hectares, the smallest area since 2017/18. The year-over-year area reduction was offset by the year-over-year improvement in the sugarcane yield and in the sucrose factory recovery rate (table 4).

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 FAS Mexico City *Sugar Annual* report. The report projects the 2025/26 area harvested at 760,000 hectares (lower than the 5-year average), and a sugarcane yield of 64.20 MT per hectare) and recovery rate of 10.44 percent.

Mexico's 2024/25 and 2025/26 Sugar Balance Sheets Are Mostly Unchanged

The only other change to the Mexico's 2024/25 sugar balance sheet is a 35,000-MT increase in exports outside of the suspension agreements' export license system, which puts the estimate at 415,000 MT. The increase in this export category, which is mostly to countries other than the United States, was carried out to match the actual volume exported in CONADESUCA's June *National Sugar Balance* report. On August 15, CONADESUCA released the July *National Sugar Balance* report reflecting about 454,000 MT of cumulative exports for this category. The *WASDE* will be adjusted accordingly next month.

Similarly, Mexico's 2025/26 sugar balance is mostly unchanged, except for a 34,000-metric ton (MT) reduction to beginning stocks. Correspondingly, exports outside of the sugar suspension agreements are residually lowered by the same amount to 274,000 MT to maintain a reasonable target level for ending stocks. Mexico's sugar exports to the United States are unchanged at 375,947 MT. This volume will be recalculated by the U.S. Department of Commerce using next month's *World Supply and Demand Estimates (WASDE)* report to achieve a U.S. stocks-to-use ratio of 13.5 percent according to the provisions of the suspension agreements.

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

	2023/24	2024/25			2025/26		
	Final	July (estimate)	August (estimate)	Monthly change	July (forecast)	August (forecast)	Monthly change
Beginning stocks	835	1,418	1,418	0	1,098	1,064	-34
Production	4,704	4,770	4,771	1	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	6,363	6,363	1	6,334	6,300	-34
Disappearance							
Human consumption	4,127	4,057	4,057	0	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	4,459	4,459	0	4,569	4,569	0
Exports	446	806	840	35	684	650	-34
Exports to the United States and Puerto Rico	446	425	425	0	376	376	0
Exports to other countries 1/	0	381	415	35	308	274	-34
Total use	4,882	5,265	5,299	35	5,253	5,219	-34
Ending stocks	1,418	1,098	1,064	-34	1,081	1,081	0
Domestic	1,418	948	914	-34	931	931	0
United States 2/	N/A	150	150	0	150	150	0
Stocks-to-human consumption (percent)	34.4	27.1	26.2	-0.8	26.0	26.0	0.0
Stocks-to-use (percent)	29.0	20.9	20.1	-0.8	20.6	20.7	0.1
High-fructose corn syrup (HFCS) consumption (dry weight)	1,599	1,755	1,755	0	1,680	1,680	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.

2/ Starting in May 2025, a new line for "sugar inventory with polarity of less than 99.2 for exports to the United States" was added. This addition was done after Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA) included this information in its fourth iteration of the 2024/25 National Sugar Balance report, published on May 6.

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

Table 4: Mexico's sugarcane and sugar production, fiscal years 2017/18–2025/26

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 estimate	736,486	62.12	45,750	10.43	6.48	4,771
2025/26 projection	760,000	64.20	48,792	10.44	6.70	5,094
5-year average (2020/21–2024/25)	775,126	63.29	49,076	10.81	6.85	5,320

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

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