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Sugar and Sweeteners Outlook: April 2026

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U.S. 2025/26 Sugar Ending Stocks Are Mostly Unchanged; Mexico's 2025/26 Sugar Production Is Raised

The U.S. 2025/26 sugar supply is forecast at 14.269 million short tons, raw value (STRV), up 71,000 STRV from last month, as a decrease in domestic sugar production is more than offset by increases in imports (high-tier duty and re-export program). Sugar use is raised 69,000 STRV, as an increase in sugar deliveries for human consumption (up 94,000 STRV to 12.259 million) more than offsets a reduction in exports (down 25,000 STRV to 25,000). With sugar supply and use raised by nearly equal volumes, ending stocks are up 2,000 STRV to 1.880 million, and the resulting sugar stocks-to-use ratio is unchanged at 15.2 percent.

The main change on Mexico's 2025/26 balance sheet is a 101,000-metric tons (MT) actual weight increase in sugar production (now at 5.125 million MT) on higher-than-expected sugarcane yield and sucrose recovery more than offsetting the delays in area harvested. The increase in production leads to an equal increase in Mexico's sugar exports to other countries (outside of the suspension agreements), which is now estimated at a 7-year high of 747,000 MT, to maintain reasonable ending stocks before production in the next marketing year.

Approved by USDA's World Agricultural Outlook Board

U.S. Sugar Outlook

U.S. 2025/26 Beet Sugar Production Is Lowered

U.S. beet sugar production for fiscal year 2025/26 is lowered from last month by 33,000 short tons raw value (STRV) to 5.060 million short tons, raw value (STRV) (table 1)—more than 300,000-STRV lower (6 percent) than the previous year and the lowest level since the freeze-reduced output in 2019/20. This month's reduction is driven by changes to beet processors' estimates that were published on the USDA, Farm Service Agency, *Sweetener Market Data* (*SMD*) February 2026 report. This report reflected larger sugarbeet pile shrink and lower sucrose recovery that were only offset by an increase in sugar produced from desugared molasses (table 2). The increased sugarbeet shrink and reduced sucrose recovery can be partly attributed to warmer-than-normal February temperatures that spanned several days, particularly in the major-producing Red River Valley region. Frozen sugarbeets stored in outdoor piles may thaw if the air temperature warms too quickly and if warm conditions extend multiple days.

USDA, National Agricultural Statistics Service (NASS) released its *Prospective Plantings* report on March 31, which indicated that sugarbeet growers intend to plant 1.063 million acres for the upcoming 2026/27 crop year. This planting implies a 16,000-acre decrease (1.5 percent) from the 2025/26 area planted and a 69,000-acre decrease (6.1 percent) relative to last year's prospective plantings. Beet processors determine planted area mainly based on optimizing sugarbeet slicing capacity for the upcoming campaign, as well as by expected returns.

NASS *Crop Progress* report for the week ending April 12 indicated that sugarbeet plantings in the 4 major-producing States reached 9 percent, comparable to last year (10 percent) and the 5-year average (9 percent). Sugarbeet plantings in Idaho are about half-way done (versus last year's 52 percent and the last 5 years' 35 percent) and 1 percent done in Michigan (behind last year's 2 percent and the 5-year average's 15 percent). Meanwhile, planting has not started in the Red River Valley, in line with the timing in the last 5 years.

Table 1: U.S. sugar supply and use by fiscal year (October–September), 1,000 short tons raw value

	2023/24	2024/25			2025/26		
	Final	March	April	Monthly change	March	April	Monthly change
Beginning stocks	1,843	2,220	2,220	0	2,490	2,490	0
Total production	9,313	9,397	9,397	0	9,280	9,268	-13
Beet sugar	5,172	5,370	5,370	0	5,093	5,060	-33
Cane sugar	4,141	4,027	4,027	0	4,187	4,207	20
Florida	2,079	1,932	1,932	0	1,956	1,976	20
Louisiana	2,022	2,095	2,095	0	2,232	2,232	0
Texas 1/	40	0	0	0	0	0	0
Total imports	3,840	3,393	3,393	0	2,427	2,512	84
Tariff-rate quota imports	1,788	1,534	1,534	0	1,316	1,316	0
Other program imports	300	373	373	0	250	300	50
Non-program imports	1,752	1,485	1,485	0	861	896	34
Mexico	521	504	504	0	220	220	0
High-tier tariff/other	1,231	980	980	0	642	676	34
High-tier tariff	1,176	928	928	0	590	624	34
Raw sugar	887	547	547	0	157	158	1
Refined sugar	289	382	382	0	197	197	0
Refined sugar (specialty) 2/	NA	NA	NA	NA	236	269	33
Other 3/	55	52	52	0	52	52	0
Total supply	14,995	15,009	15,009	0	14,197	14,269	71
Total exports	249	111	111	0	50	25	-25
Miscellaneous	83	-41	-41	0	0	0	0
Total deliveries	12,443	12,450	12,450	0	12,270	12,364	94
Domestic food and beverage	12,336	12,340	12,340	0	12,165	12,259	94
Sugar-containing products re-export program	83	82	82	0	80	80	0
Polyhydric alcohol, feed, other alcohol	23	29	29	0	25	25	0
Commodity Credit Corporation (CCC) for ethanol	0	0	0	0	0	0	0
Total use	12,775	12,520	12,520	0	12,320	12,389	69
Ending stocks	2,220	2,490	2,490	0	1,878	1,880	2
Private	2,220	2,490	2,490	0	1,878	1,880	2
Commodity Credit Corporation	0	0	0	0	0	0	0
Stocks-to-use ratio (percent)	17.4	19.9	19.9	0.0	15.2	15.2	-0.1

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

1/ The last cane processor in Texas closed in 2023/24. 2/ A separate line for high-tier refined sugar (specialty) was included starting in the July 2025 *World Agricultural Supply and Demand Estimates* (*WASDE*) report. Before the July 2025 *WASDE*, this volume was included in the "high-tier refined sugar" line. 3/ The "Other" line 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, Farm Service Agency, *Sweetener Market Data* report; USDA, Foreign Agricultural Service, *U.S. Sugar Monthly Import and Re-Exports* report.

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

	2023/24 final	2024/25 final	2025/26 March	2025/26 April	Monthly change
Area planted (1,000 acres) 1/	1,125	1,104	1,079	1,079	0
Planted/Harvested ratio	0.99	0.98	0.98	0.98	0.00
Area harvested (1,000 acres) 1/	1,114	1,086	1,060	1,060	0
Yield (tons per acre) 1/	32.20	32.50	33.2	33.2	0.0
Sugarbeet production (1,000 tons)	35,884	35,316	35,140	35,140	0
Sugarbeet shrink (percent) 2/	7.93	7.90	8.82	9.08	0.25
Sugarbeet sliced (1,000 tons)	33,037	32,527	32,039	31,950	-89
Sugar extraction rate from slice (percent) 2/	14.74	15.46	14.793	14.716	-0.08
Sugar from beets sliced (1,000 STRV)	4,870	5,030	4,740	4,702	-38
Sugar from molasses (1,000 STRV) 2/	275	324	375	380	5
Crop year sugar production (1,000 STRV)	5,145	5,354	5,115	5,082	-33
Aug.–Sep. sugar production (1,000 STRV)	663	690	706	706	0
Aug.–Sep. sugar production of next crop (1,000 STRV) 3/	690	706	654	654	0
Sugar from imported beets (1,000 STRV) 4/	N/A	0	30	30	0
Fiscal year sugar production (1,000 STRV) 5/	5,172	5,370	5,093	5,060	-33

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 2025/26, based on beet processors' estimates submitted to the USDA, FSA, *Sweetener Market Data* (*SMD*) report.
3/ For 2025/26, based on a 10-year average (2015/16–2024/25).
4/ For 2025/26, based on beet processors' increased capacity from capital improvements.
5/ For 2023/24 and 2024/25, sugar from imported beets is already included in the final crop year production. 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 the prior years, once the full crop year slice is available.
6/ Fiscal year sugar production = crop year sugar production minus August to September sugar production plus August to September sugar production of the next crop.

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

U.S. 2025/26 Cane Sugar Production Is Raised

U.S. cane sugar production for fiscal year 2025/26 is increased 20,000 STRV from last month to 4.207 million, solely on an upward adjustment to Florida's output by the same magnitude, following a larger estimate submitted by the cane processors in the *SMD*. Florida's cane sugar production now stands at 1.976 million STRV, a 2-percent increase from last year (table 3).

Louisiana's fiscal year 2025/26 cane sugar production, which is projected at a historic high of 2.232 million STRV, is unchanged. This record outlook for the State implies 6 consecutive years of growth and 4 years of surpassing Florida.

Table 3: U.S. sugarcane and cane sugar production, 2021/22–2025/26

	2021/22	2022/23	2023/24	2024/25	2025/26
Florida					
Area harvested for sugar (1,000 acres)	388	386	391	381	399
Sugarcane yield (tons per acre)	42.4	44.5	44.4	45.1	41.9
Sugarcane production for sugar (1,000 tons)	16,451	17,177	17,360	17,183	16,718
Recovery rate (percent)	11.8	11.6	12.0	11.2	11.7
Sugar production (1,000 STRV)	1,934	1,985	2,079	1,931	1,976
Louisiana					
Area harvested for sugar (1,000 acres)	466	474	481	498	504
Sugarcane yield (tons per acre)	29.0	32.1	29.9	31.1	31.7
Sugarcane production for sugar (1,000 tons)	13,514	15,215	14,382	15,488	15,977
Recovery rate (percent)	13.9	13.6	13.2	13.6	14.3
Crop year sugar production (1,000 STRV)	1,881	2,071	1,904	2,105	2,279
Sep. sugar production (1,000 STRV)	12	75	6	124	114
Sep. sugar production of the next crop (1,000 STRV)	75	6	124	114	67
Fiscal year sugar production (1,000 STRV) 1/	1,944	2,001	2,022	2,095	2,232
Texas 2/					
Area harvested for sugar (1,000 acres)	34	31	17	0	0
Sugarcane yield (tons per acre)	30.8	22.6	22.5	0	0
Sugarcane production for sugar (1,000 tons)	1,056	698	371	0	0
Recovery rate (percent)	11.8	10.9	10.7	0	0
Sugar production (1,000 STRV)	124	76	40	0	0
United States					
Area harvested for sugar (1,000 acres)	888	891	889	879	903
Sugarcane yield (tons per acre)	34.9	37.1	36.1	37.2	36.2
Sugarcane production for sugar (1,000 tons)	31,021	33,090	32,113	32,671	32,695
Crop year recovery rate (percent)	12.7	12.5	12.5	12.4	13.0
Crop year sugar production (1,000 STRV)	3,940	4,132	4,022	4,036	4,255
Fiscal year sugar production (1,000 STRV)	4,002	4,063	4,141	4,027	4,207

STRV = short tons, raw value; Sep. = September.

1/ Louisiana's fiscal year sugar production = crop year sugar production minus September sugar production plus September sugar production of the next crop.
2/ The last cane processor in Texas closed in 2023/24.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service (NASS) and USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates* (*WASDE*) report.

U.S. 2025/26 Sugar Imports Are Adjusted Upwards

U.S. 2025/26 sugar imports are raised from last month by 84,000 STRV to 2.512 million, but remain about 900,000-STRV lower than 2024/25 and the lowest in almost two decades (figure 1). The upward revision is driven by a 34,000-STRV increase for high-tier duty sugar imports and a 50,000-STRV increase for sugar imports under the USDA re-export programs based on pace.

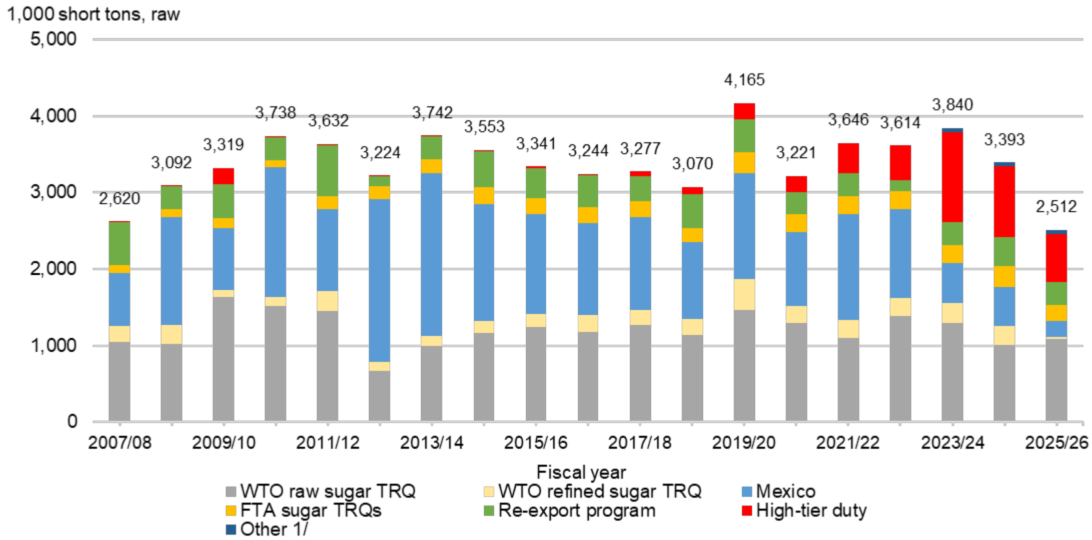
The estimate for high-tier duty refined sugar specialty (mostly comprised of organic sugar) is increased by 33,000 STRV to 269,000. This increase accounts for the average volume that entered in fiscal years 2022/23 and 2023/24[1] above the announced additional specialty sugar tariff-rate quota for these years (between 220,000–230,000 STRV[2]) (figure 2). The remaining

[1] Imports of high-tier duty refined sugar specialty for fiscal year 2024/25 were excluded in the average calculation because of the uptick of volume between July 2025 to September 2025, following the tariff imposition on major sources such as Brazil.
[2] USDA announced zero additional refined specialty sugar TRQ for fiscal year 2025/26.

increase is for the raw sugar component, which is up by 1,000 STRV to 158,000, to reflect additional volume of sugar that entered after the March *World Agricultural Supply and Demand Estimates* (*WASDE)* report. Thus, the new estimate for high-tier duty sugar imports stands at 624,000 STRV, overtaking Mexico as the second largest sugar import category for a third consecutive year.

Figure 1

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



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

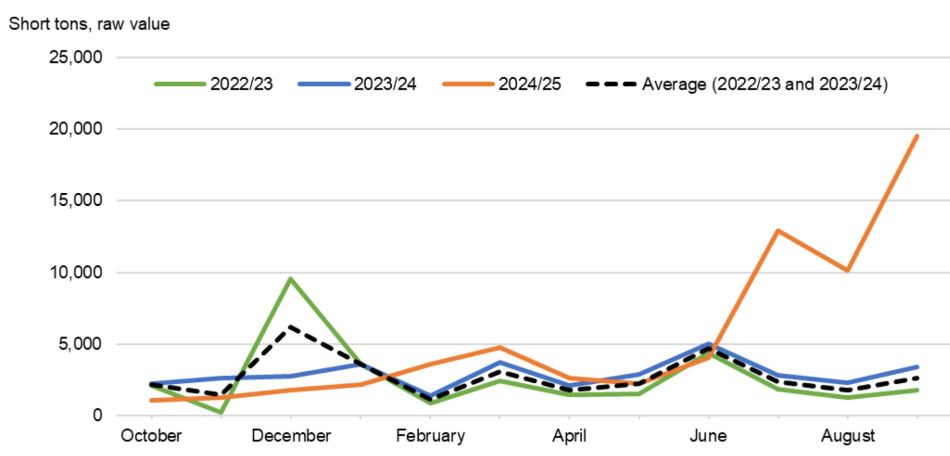
Note: The data labels at the top of the bars represent total imports.

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, 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.

Figure 2

U.S. monthly sugar imports of high-tier refined sugar (specialty), fiscal years 2022/23–2024/25



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

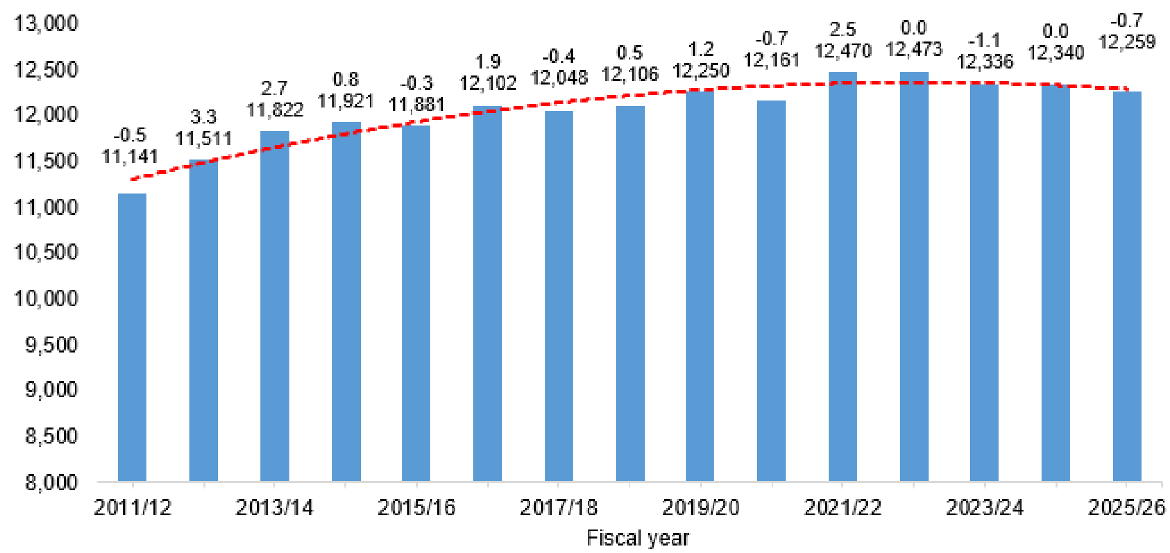
U.S. 2025/26 Sugar Deliveries for Human Consumption Are Up

U.S. 2025/26 sugar deliveries for food and beverage use are raised from last month by 94,000 STRV to 12.259 million STRV (figure 3), based on a stronger-than-expected pace of non-reporter deliveries (also known as direct consumption imports, or DCI[3]) during the first 5 months of the fiscal year. Cumulative DCI more than offset the relatively sluggish cane sugar deliveries (table 4) and the average pace of beet sugar deliveries (figure 4 to 7). This revised estimate of 12.259 million STRV is still down 80,000 STRV (0.7 percent) from last year's 12.340 million.

Figure 3

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.

[3] Sugar deliveries for human consumption are equal to the sum of beet and cane sugar deliveries plus DCI. DCI is also referred to as non-reporter deliveries. "Non-reporters" do not report to *SMD*, as opposed to the reporters (comprised of beet processors and cane refiners), 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 in the *SMD* report from the total imports in the USDA's Foreign Agricultural Service's (FAS) *U.S. Sugar Monthly Import and Re-Exports* report. The formula is: DCI = FAS total imports – *SMD* cane refiner imports.

Table 4: U.S. sugar deliveries for food and beverage use, October–February, 2020/21–2025/26

Components	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	5-year average	Annual change (2025/26 versus 2024/2025)	
	1,000 STRV								Percent
Beet sugar processors	1,979	2,144	2,073	1,990	1,947	2,048	2,026	101	5.2
Cane sugar refiners	2,558	2,531	2,684	2,779	2,662	2,610	2,643	-53	-2.0
Total reporters	4,537	4,674	4,757	4,769	4,610	4,658	4,669	48	1.1
Non-reporters (direct consumption)	283	427	404	236	303	343	331	39	12.9
Total	4,820	5,102	5,161	5,005	4,913	5,001	5,000	88	1.8
	Percent share in total								Percentage points
Beet sugar processors	41	42	40	40	40	41	41	1	N/A
Cane sugar refiners	53	50	52	56	54	52	53	-2	N/A
Total reporters	94	92	92	95	94	93	93	-1	N/A
Non-reporters (direct consumption)	6	8	8	5	6	7	7	1	N/A
Total	100	100	100	100	100	100	100	0	N/A

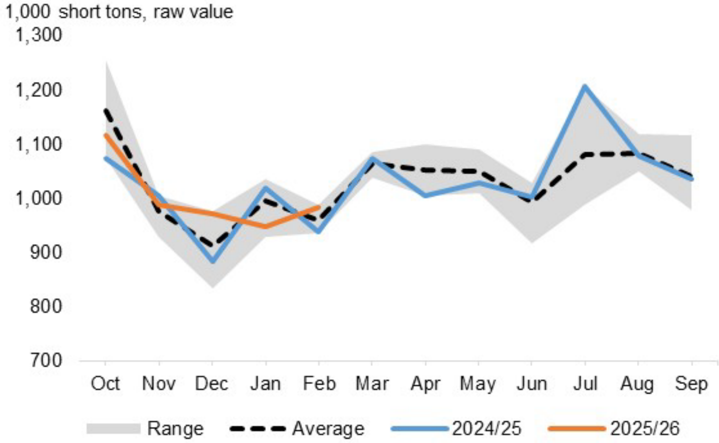
N/A = not applicable; STRV = short tons, raw value.

Note: Totals and percentages may not add due to rounding. "Reporters" refer to beet processors and cane refiners that report their data to the USDA, Farm Service Agency's monthly Sweetener Market Data (SMD) report. Years included in the 5-year average are 2020/21–2024/25.

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

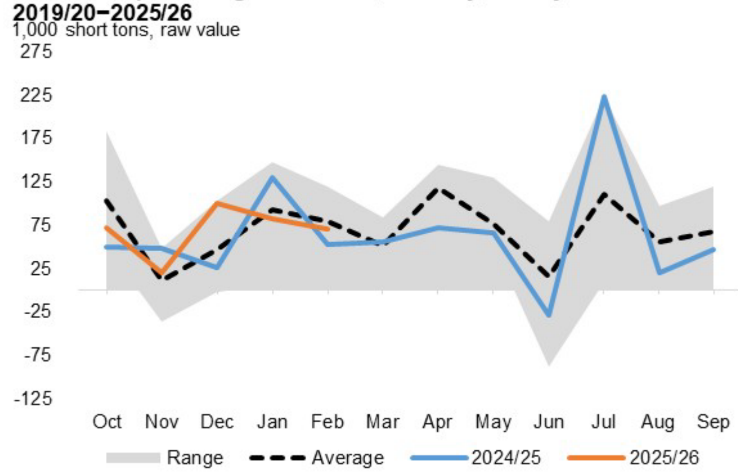
Because of this year’s uptick in deliveries particularly in February, beet sugar inventories as of February 28 (2.283 million STRV) have finally fallen below last year’s volume but remain at the post-2020/21 maximum range (figure 8). Refined cane sugar inventories, on the other hand, remain at a historic high of 627,000 STRV. Raw cane sugar inventories held jointly by cane processors and cane refiners (2.704 million STRV) are also at record volume. Thus, total sugar stocks as of February 28 currently stand at 5.613 million STRV, about 220,000-STRV larger than last year and the largest for February since fiscal year 2001/02 (the earliest year *SMD* was published).

Figure 4
U.S. total sugar deliveries for food and beverage use, monthly,



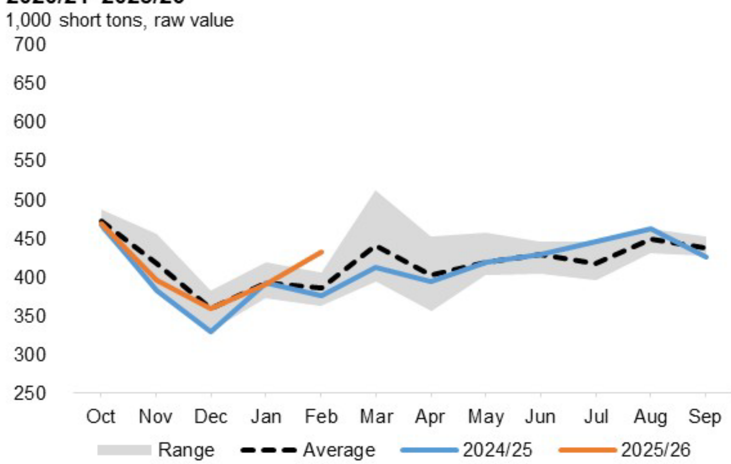
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Figure 5
U.S. non-reporter sugar deliveries, monthly, fiscal years 2019/20–2025/26



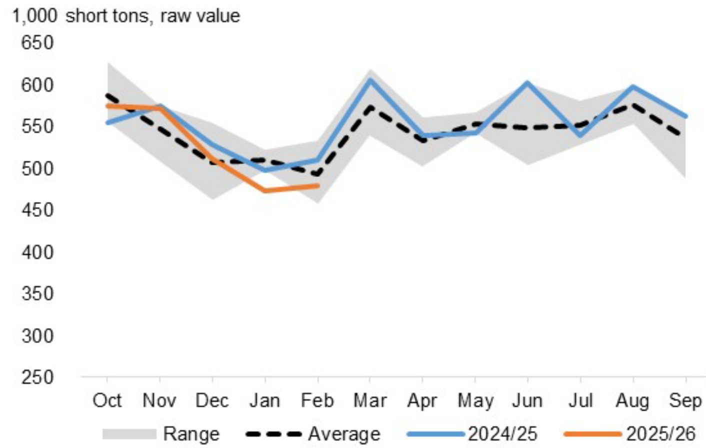
Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Figure 6
U.S. refined beet sugar deliveries, monthly, fiscal years 2020/21–2025/26



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

Figure 7
U.S. refined cane sugar deliveries, monthly, fiscal years

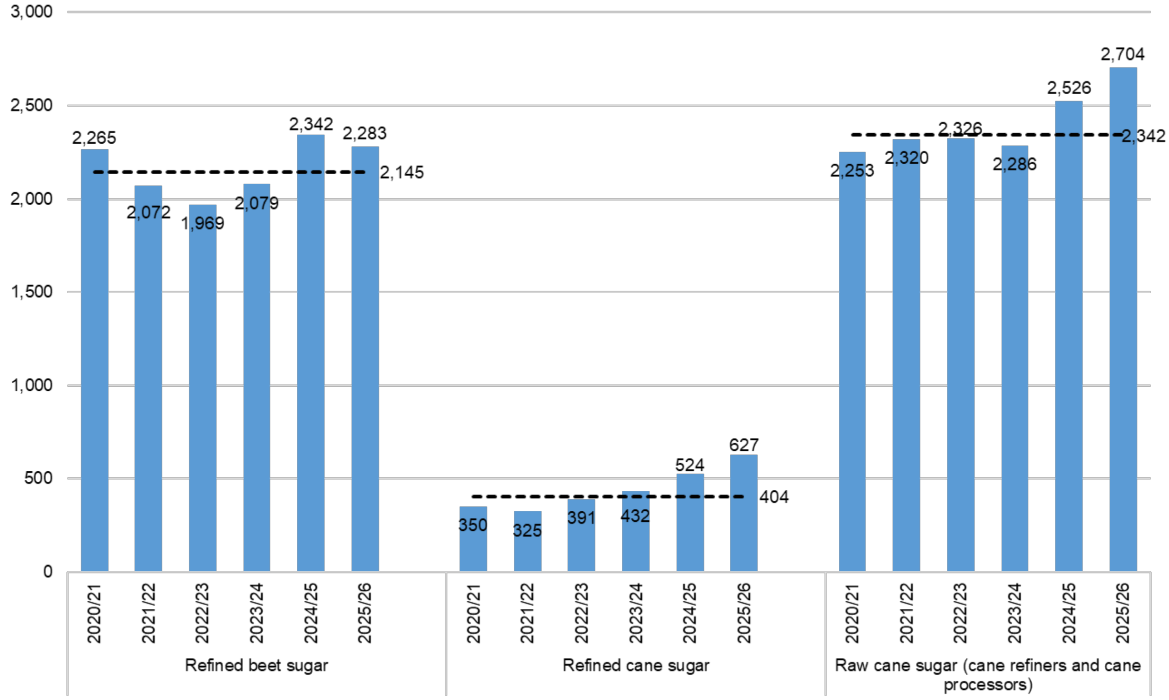


Source: USDA, Economic Research Service calculations using data from USDA, Farm Service Agency.

Figure 8

U.S. ending stocks of sugar as of February 28, by type, fiscal years 2020/21–2025/26

1,000 short tons, raw value



Note: The dashed horizontal line represents the 5-year average.

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

Mexico's Sugar Outlook

Mexico's 2025/26 Sugar Production Is Increased

The main change in Mexico's 2025/26 balance sheet is for sugar production, which is raised from last month by 101,000-metric tons (MT), actual weight to 5.125 million (table 5). This upward adjustment is based on higher-than-expected sugarcane yield and sucrose recovery more than offsetting the relatively slower harvest pace due to devastating rains and flooding at the start of harvest campaign in some areas (table 6).

As of week 27 (week that ended on April 4), cumulative harvested area (472,000 hectares or ha) still lags last year's pace by 8 percent but is more than offset by a stronger sugarcane field yield (73.5 MT/ha) and extraction rate (10.7 percent). As such, sugar production to date (3.719 million MT) has surpassed last year's pace by 3 percent.

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

	2023/24	2024/25	2025/26		
	Final	Final	March	April	Monthly change
Beginning stocks	835	1,418	1,123	1,123	0
Production	4,704	4,771	5,024	5,125	101
Imports	761	167	52	52	0
Imports for consumption	722	154	39	39	0
Imports for sugar-containing product exports (IMMEX)	40	13	13	13	0
Total supply	6,300	6,355	6,199	6,300	101
Disappearance					
Human consumption	4,127	3,901	4,001	4,001	0
For sugar-containing product exports (IMMEX)	304	323	296	296	0
Other deliveries and end-of-year statistical adjustment	5	-14	0	0	0
Total	4,436	4,210	4,297	4,297	0
Exports	446	1,023	834	935	101
Exports to the United States and Puerto Rico	446	431	188	188	0
Exports to other countries 1/	0	591	646	747	101
Total use	4,882	5,232	5,131	5,232	101
Ending stocks	1,418	1,123	1,068	1,068	0
Domestic	1,418	973	918	918	0
United States 2/	N/A	150	150	150	0
Stocks-to-human consumption (percent)	34.4	28.8	26.7	26.7	0.0
Stocks-to-use (percent)	29.0	21.5	20.8	20.4	-0.4
High-fructose corn syrup (HFCS) consumption (dry weight)	1,599	1,639	1,640	1,640	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).

The USDA, Foreign Agricultural Service Mexico City Post partly attributed the yield recovery to two factors: (1) seasonal rains prior to the start of the season, which contributed to alleviating much of the persistent drought effects experienced in the last 2 years; and (2) harvest of newly planted sugarcane (e.g., sugarcane planted 2 years ago) after the drought caused the sugarcane to die and compelled growers to plant new ones particularly in the Northeast region (San Luis Potosi and northern Veracruz).

Following FAS Mexico City Post's projections, area harvested is estimated to be between 690,000 and 727,000 ha, sugarcane yield is between 65.50 and 69.00 MT/ha and sucrose recovery is between 10.70 and 10.84 percent. The resulting sugar production estimate of 5.125 million MT reflects about a 7-percent increase compared with the past 2 years of weather-affected output (around 4.7 million MT) but remains at the low-end compared to pre-2023/24 years. The increase in production leads to an equal increase in Mexico’s sugar exports to other countries (outside of the suspension agreements), which are now estimated at a 7-year high of 747,000 MT, to maintain reasonable ending stocks before production in the next marketing year.

Table 6: Mexico’s cumulative sugar production through week 27 of the harvest season

	Pace to date		Over-the-year difference (2025/26 versus 2024/25)	
	2024/25	2025/26	Level	Percent
Area harvested (1,000 ha)	515	472	-43	-8
Sugarcane processed (1,000 MT)	35,169	34,686	-483	-1
Sugarcane yield (MT per ha)	68.3	73.5	5.2	8
Extraction rate (percent)	10.3	10.7	0.4	4
Agro-industrial yield (MT sugar per ha)	7.0	7.9	0.8	12
Sugar production (1,000 metric tons)	3,625	3,719	94	3
By type:				
Refinada	727	746	19	3
Estándar	2,597	2,705	108	4
Blanco especial	47	50	4	8
Mascabado	0	20	20	NA
Polarity less than 99.2	254	198	-56	-22

ha = hectares; MT = metric tons.
Note: Totals and monthly changes may not add due to rounding.
Source: USDA, Economic Research Service calculations using data from Mexico's National Committee for the Sustainable Development of Sugarcane (CONADESUCA).

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