SUGAR: U.S. sugarbeet production for 2021/22 is projected at 35.140 million tons with yield forecast at 30.71 tons/acre and area harvested projected at 1.144 million acres. National yield is projected on analysis of historical regional trends and also reflects excellent planting progress through early May. Assuming average levels of beet pile shrink and slicing recovery, beet sugar production is projected at 5.225 million short tons, raw value (STRV). Cane sugar production for 2021/22 is projected at 4.085 million STRV. Production levels in Florida and Texas are expected to be close to 2020/21 levels and production in Louisiana is down from the 2020/21 record but still strong at 1.850 million STRV. Florida cane sugar for 2020/21 is down 70,000 STRV to 2.100 million on lower sugar yields estimated by processors.

TRQ imports for 2021/22 are projected at 1.387 million STRV with levels set at minimum levels consistent with the WTO and FTA bindings and with a TRQ shortfall projected at 99,208. High-tier tariff imports for 2021/22 are projected at 50,000 STRV. Imports from Mexico for 2021/22 are projected at 964,775 STRV. For 2020/21, imports from Mexico are up by 50,000 STRV to reflect the recent increase in the “Other Sugars” Export Limit. The raw sugar TRQ shortfall is increased to 146,854 STRV. Deliveries for 2021/22 are projected at 12.320 million STRV, flat with levels estimated for 2020/21. Ending stocks for 2021/22 are residually projected at 1.502 million STRV, implying a stocks-to-use ratio of 12.25 percent.

Mexico production for 2021/22 is projected at 5.809 million metric tons (MT). Below average yields are projected due to poor soil conditions from ongoing drought and low area replacement turnover. Production for 2020/21 is reduced by 75,000 MT to 5.825 million on a combination of lower area and reduced sugar yields. Deliveries of sugar and high fructose corn syrup are projected to decline in both 2020/21 and 2021/22 due to government actions to curb consumption of high-calorie foods, weakness in the economy, and high inflation. Ending stocks for both 2020/21 and 2021/22 are set equal to 2.5 months of forecast domestic sugar deliveries before the start of the succeeding sugarcane harvest. Total exports are residually projected but exports to the United States are projected at the expected level of U.S. Needs, which provisionally assumes a level for the 2021/22 U.S. additional specialty TRQ at the same level as 2020/21; that is, 140,000 MT, raw value.

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U.S. Sugar Supply and Use 1/

	2019/20	2020/21 Est. Apr	2020/21 Est. May	2021/22 Proj. May
		1,000 Short Tons,	*Raw Value*	
Beginning Stocks	1783	1618	1618	1805
Production 2/	8149	9344	9299	9310
Beet Sugar	4351	5093	5118	5225
Cane Sugar	3798	4251	4181	4085
Florida	2106	2170	2100	2100
Louisiana	1566	1949	1949	1850
Texas	126	132	132	135
Imports	4235	3152	3154	2652
TRQ 3/	2152	1721	1673	1387
Other Program 4/	432	300	300	250
Other 5/	1651	1131	1181	1015
Mexico	1376	931	981	965
Total Supply	14166	14113	14070	13767
Exports	61	35	35	35
Deliveries	12414	12230	12230	12230
Food	12316	12125	12125	12125
Other 6/	98	105	105	105
Miscellaneous	74	0	0	0
Total Use	12549	12265	12265	12265
Ending Stocks	1618	1848	1805	1502
Stocks to Use Ratio	12.9	15.1	14.7	12.2

1/ Fiscal years beginning Oct 1. Data and projections correspond to category components from "Sweetener Market Data" (SMD). 2/ Production projections for 2020/21 and 2021/22 are based on Crop Production and/or processor projections/industry data and/or sugar ICEC analysis where appropriate. 3/ For 2020/21, WTO raw sugar TRQ shortfall (147) and for 2021/22 (99). 4/ Composed of sugar under the re-export and polyhydric alcohol programs. 5/ Imports from Mexico; and high-tier tariff sugar and syrups not otherwise specified -- for 2020/21 (200) and 2021/22 (50). 6/ Transfers accompanying deliveries for sugar-containing products to be exported (SCP) and polyhydric alcohol manufacture (POLY), and deliveries for livestock feed and ethanol. Total refiner license transfers for SCP and POLY inclusive of WASDE-reported deliveries: 2019/20 -- 298; estimated 2020/21 -- 347; projected 2021/22 -- 358.

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Mexico Sugar Supply and Use and High Fructose Corn Syrup Consumption 1/

		Beginning Stocks	Production	Imports	Domestic 2/	Exports	Ending Stocks
				1,000 Metric Tons,	*Actual Weight*		
Sugar							
2020/21 Est.	Apr	858	5900	105	4445	1492	926
	May	858	5825	105	4378	1499	910
2021/22 Proj.	Apr	NA	NA	NA	NA	NA	NA
	May	910	5809	85	4370	1524	910

1/ HFCS consumption by Mexico (1,000 metric tons, dry basis): 2019/20 = 1,388; Estimated 2020/21 = 1,325; Projected 2021/22 = 1,300. Estimated Oct-Mar 2020/21 = 641; Estimated Oct-Mar 2019/20 = 685. Footnote source for estimate: Comite Nacional para el Desarollo Sustentable de la Cana de Azucar. 2/Includes deliveries for consumption, Mexico's products export program (IMMEX), and Other Deliveries/Ending Year Statistical Adjustments. IMMEX: 2020/21 (415 est =350 dom.+65 import); 2021/22 (415 proj = 350 dom.+65 import). Statistical Adjustments: 2020/21 (0), 2021/22 (0).