



United States Department of Agriculture

A banner for the Agricultural Outlook Forum. On the left, it says "USDA'S 98TH ANNUAL Agricultural Outlook Forum" over a background of a field with a large white leaf graphic. On the right, it says "VIRTUAL EVENT | FEBRUARY 24-25, 2022" and "New Paths to Sustainability and Productivity Growth" in a cursive font, with a small USDA logo at the bottom right.

USDA'S 98TH ANNUAL  
**Agricultural  
Outlook Forum**

VIRTUAL EVENT | FEBRUARY 24-25, 2022  
*New Paths to  
Sustainability and  
Productivity Growth*



# Sugar Outlook

**Thursday, February 24, 2022**

## 2022/23 U.S. SUGAR SUPPLY AND USE<sup>1</sup>

### Basis for projecting 2022/23 supply and demand:

- o Projections of supply and demand are based on analyses by the Interagency Commodity Estimates Committee (ICEC) for sugar.

### Key results for 2022/23:

- o Beginning stocks, which are equal to the 2021/22 ending stocks in the February *WASDE*, are 1.818 million STRV, up 113 thousand STRV from 2021/22.
- o After the publication of the March 2022 *WASDE* report, the 2021/22 Mexican Export Limit is likely to be adjusted, which could affect 2022/23 beginning stocks.
- o Beet sugar production is projected at 5.124 million STRV based on crop and processing parameters, such as beet pile shrink rate and extraction rate, that are in line with recent historical averages. The first official NASS forecast for the 2022/23 sugarbeet planted area will be available from the *Prospective Plantings* report on March 31.
- o Cane sugar production is projected at 4.088 million STRV with the assumption of normal weather conditions. Production for Louisiana is forecast a modest increase based on yield and sugar recovery that are comparable with the recent 5-year average. Florida's production is projected at the same level as the 2021/22 output, assuming no extended impacts from last month's freeze event. Production for Texas is likewise unchanged from 2021/22, matching the recent the recent 3-year average.
- o Total imports are projected to total 3.060 million STRV. Imports under tariff-rate quota programs are projected to total 1.621 million STRV—including a 99,000 STRV shortfall in the WTO raw sugar TRQ. Sugar imports from Mexico are residually projected at 1.114 million STRV, in accordance with the suspension agreements "U.S. Needs" calculation.
- o Deliveries for human consumption are projected at 12.274 million STRV, a 0.6 percent increase over the current 2021/22 projections.
- o Ending stocks total 1.676 million STRV and the stocks-to-use ratio is 13.5 percent.

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<sup>1</sup>Approved by the Interagency Commodity Estimates Committee for sugar.

2022 USDA Agricultural Outlook Forum, Sweeteners Session  
February 25, 2022

U.S. Sugar Supply and Use 1/

Item	2020/21	2021/22		2022/23
		January	February	Projection
1,000 short tons, raw value				
Beginning stocks	1,618	1,705	1,705	1,818
Production 2/	9,233	9,393	9,442	9,212
Beet sugar	5,092	5,401	5,401	5,124
Cane sugar	4,141	3,992	4,041	4,088
Florida	2,090	2,005	2,005	2,005
Louisiana	1,918	1,857	1,906	1,953
Texas	134	130	130	130
Imports	3,195	3,016	3,012	3,060
TRQ 3/	1,749	1,551	1,547	1,621
Other program 4/	292	250	250	250
Other 5/	1,154	1,215	1,215	1,189
Mexico	968	1,065	1,065	1,114
High-tier	186	150	150	75
Total Supply	14,046	14,113	14,158	14,090
Exports 2/	49	35	35	35
Deliveries 2/	12,252	12,305	12,305	12,379
Food	12,135	12,200	12,200	12,274
Other 6/	116	105	105	105
Miscellaneous	40	0	0	0
Total use	12,341	12,340	12,340	12,414
Ending stocks	1,705	1,773	1,818	1,676
Stocks to use ratio	13.8	14.4	14.7	13.5

1/ Fiscal years beginning Oct 1. Data and projections correspond to category components from USDA's "Sweetener Market Data" report. 2/ Production projections for 2021/22 and 2022/23 are based on Crop Production and/or processors' projections/industry data and/or ICEC analysis. 3/ For 2021/22, WTO raw sugar TRQ short fall (251) and for 2022/23 (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. 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-report deliveries: 2020/21 - 298; 2021/22 - 313; 2022/23 - 282.