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Sugar

Summary

World sugar production will be in surplus in 1994/95. A mid-June revision to India's production estimate moved the USDA forecast from a production-consumption balance to a production surplus. Since March, production forecasts were revised upward for several key producing countries, such as India, Thailand, Cuba, and Brazil. Lower-than-originally expected consumption in Russia and Mexico helped move sugar supplies from the previous expected deficit to a surplus. This surplus follows 2 years during which world stocks were drawn down sharply. These stock drawdowns resulted in strong world sugar prices, particularly during the last quarter of 1994 and the first quarter of 1995. However, world sugar prices are expected to face downward pressure due to a forecast larger world sugar crop and increased export availabilities in 1995/96. World sugar production in 1995/96 is forecast to increase 1.8 percent to a record 117.7 million metric tons, and is expected to exceed world consumption.

Particularly noteworthy are developments in India, where production was revised upward 11 percent from the March forecast (1.1 million tons above USDA's May forecast) to a record 16.0 million tons for 1994/95 and a projected 15.1 million for 1995/96. Good weather conditions and increased planted area, which resulted from firm market prices at planting and a hike in the minimum cane support price, resulted in a record 1994/95 sugarcane crop of 255 million tons. In addition, firm prices during 1993/94 enabled mills to pay outstanding arrears to farmers, which has stimulated cane deliveries in 1994/95. The government provided early and late season crushing incentives, which increased early season crush, and may raise late season crush volumes. In addition, new sugar mills, which were licensed during the late 1980's and early 1990's, are coming on line with improved efficiency and greater capacity.

For the first-half of June, world raw sugar spot prices (f.o.b. Caribbean ports, contract No. 11, New York) averaged 13.79 cents a pound. In April and May, world raw sugar spot prices averaged 13.63 and 13.49 cents, respectively. Prices averaged 14.63 cents for the January-March quarter, the highest since the first quarter of 1990. World refined sugar prices (c.i.f. contract No. 5, London) showed a similar pattern, with prices averaging 16.31 and 17.05 cents a pound in April and May, and 18.12 cents in January-March 1995. Improved crop prospects for many key cane sugar producing and exporting countries and beet sugar producers across Europe are placing downward pressure on prices. The direction of prices over the next several months will be largely influenced by weather. If good harvest conditions continue in the Southern Hemisphere and if sugarbeet crops across Europe receive normal rains this summer, prices are likely to continue to weaken. If adverse conditions develop in a number of key countries, prices could rebound, especially since global stocks will still be relatively tight. Apart from weather, the level of Russian and Chinese buying and shipments of new crop sugar from South-Central Brazil will shape the movement of prices of both world raw and refined sugar this summer. Again India will be a pivotal country to watch. Despite the record production, imports of 400,000 tons are expected this summer, and may be used to establish buffer stocks. India's sugar industry is pressing the government to lift the ban on sugar exports. A decision has yet to be made, however, India is expected to become a net sugar exporter during 1995/96.

U.S. sugar production in fiscal 1995/96 (October 1995-September 30, 1996) is projected at 7.68 million short tons, raw value, down 3.8 percent from the revised 1994/95 estimate. Lower output forecasts result from a likely return to normal yields for sugarbeets and for Louisiana sugarcane, plus the closure of two mills in Hawaii. Beet sugar production is forecast at 4.35 million tons, down 200,000 tons from the revised estimate for this year. Cane sugar production for fiscal 1995/96 is forecast at 3.33 million tons, down 103,000 tons from the current year. Florida, the leading producing State, is expected to produce 1.80 million tons, up 4 percent from the weather-delayed 1994/95 harvest. Louisiana's sugar production is forecast at 900,000 tons, down 12 percent from the record outturn this year as yields are expected to return to more normal levels. Hawaii's sugar industry continues its contraction as two more sugar factories will close by mid-1996 and production drops 8 percent to 460,000 tons. Production in Texas and Puerto Rico are expected to remain relatively unchanged at 130,000 and 40,000 tons, respectively.

U.S. sugar consumption for fiscal 1995/96 is forecast at 9.53 million tons, up 1.6 percent or 150,000 tons from the revised estimate for the current year. The year-to-year anticipated growth rate is comparable to recent years, but down from the 2.4-percent annual growth experienced during the second half of the 1980's.

U.S. sugar import forecasts for fiscal 1995/96 are not available as the level of the tariff rate quota (TRQ) imports has not been set. The United States has a commitment, under the Uruguay Round Agreement, to the World Trade Organization (WTO) to import at least 1.256 million short tons, raw value of sugar per year at the low tariff level of the TRQ. Imports under USDA's reexport programs are forecast at 825,000 tons in 1995/96. U.S. sugar exports for the forecast year are projected at 450,000 tons, largely consisting of refined sugar reexports.

For fiscal 1994/95, total imports are estimated at 1.68 million tons, consisting of 1.39 million tons of TRQ sugar, 225,000 tons of sugar for the reexports programs, 49,000 tons from Canada, 1,000 tons high tariff, and 15,000 tons for polyhydric alcohol. The estimate for imports of quota-exempt sugar for reexport have been reduced 175,000 tons from the March estimate as refiners are delaying imports because of substantially lower futures market prices in 1996. Sugar exports for 1994/95 were lowered 8 percent to 470,000 tons due to the relatively slow pace of exports during the first-half of the year.

On June 13, the Secretary of Agriculture announced that a TRQ shortfall of 101,883 short tons (92,427 metric tons) is expected for the import quota period that ends September 30, 1995. The countries for which a shortfall is officially declared are Barbados, Congo, Gabon, Papua New Guinea, and St. Kitts and Nevis. In response, the U.S. Trade Representative announced that the quota allocations for the five countries have been suspended for the current quota period, and are being reallocated among the remaining quota holders, except for the 10 minimum quota-holding countries. The Secretary of Agriculture also reconfirmed that the August 8, 1994 announcement setting the TRQ at 1,458,333 short tons (1,322,978 metric tons) remains unchanged, and that the TRQ entry period ends September 30, 1995. Current U.S. supply-demand forecasts for sugar have not been revised to reflect the reallocation of the TRQ shortfall.

U.S. raw sugar prices (nearby futures, c.i.f., duty-paid, contract No. 14, New York) averaged 22.93 cents a pound in the first half of June (September contract) compared with 23.10 cents in May; 22.76 cents in April; and 22.22 cents for the first half of fiscal 1995. Comparable prices for the first 8-1/2 months of fiscal 1994 (October through mid-June) averaged 22.02 cents. The upturn in prices has reflected contraction in the fiscal 1995 supply situation in terms of domestic production, imports of nonquota sugar for reexport, and stocks.

U.S. corn sweetener production in fiscal 1996 (October/September) is forecast to total 12.2 million tons, dry basis, up 4.3 percent from the current year. This projection reflects expanded industry capacity and is based on recent growth trends equal to 1990-94 averages, excluding the high and low years. HFCS production for fiscal 1996 is forecast at 8.15 million short tons, dry basis, up 350,000 tons, or 4.5 percent from the current year. HFCS-55 will likely account for 60 percent of the total and HFCS-42 the remainder. Combined glucose and dextrose production are projected to reach 4.05 million tons, up 150,000 tons from the fiscal 1995 forecast. The United States remains the world's leading producer of corn sweeteners, accounting for about three-quarters of global production. For 1995/96, about 715 million bushels or 9.1 percent of the U.S. corn crop forecast at 7.9 billion bushels are expected to be used to produce corn sweeteners by the corn wet milling industry.

In the U.S., HFCS-55 and HFCS-42 consistently sell at a discount to wholesale refined sugar. The average discount over the last 5 fiscal years has been 4.2 cents a pound for HFCS-55, and 6.4 cents for HFCS-42. For the first 8 months of fiscal 1995, the discount has been 6.4 and 8.5 cents, respectively. For May, HFCS-55 and 42 list prices averaged 18.5 and 16.2 cents a pound, respectively.

Table 105.—Sugarcane for sugar and seed: Area, yield, production, value, and production of cane sugar and molasses, United States, 1986–95

Year [1]	Area harvested: For sugar	Area harvested: For seed	Area harvested: Total	Yield of cane per acre: For sugar	Yield of cane per acre: For seed	Yield of cane per acre: For sugar and seed	Production: For sugar	Production: For seed	Production: Total
	1,000 acres	1,000 acres	1,000 acres	Tons	Tons	Tons	1,000 tons	1,000 tons	1,000 tons
1986	750.7	45.5	796.2	38.5	30.2	38.1	28,936	1,375	30,311
1987	778.3	45.3	823.6	36.0	26.3	35.5	28,026	1,192	29,218
1988	793.6	51.7	845.3	35.9	27.6	35.4	28,479	1,425	29,904
1989	803.3	48.6	851.9	34.9	27.9	34.5	28,069	1,357	29,426
1990	726.4	67.8	794.2	36.4	24.5	35.4	26,475	1,661	28,136
1991	849.6	47.3	896.9	34.1	27.3	33.7	28,960	1,292	30,252
1992	870.4	54.8	925.2	33.2	27.2	32.8	28,873	1,490	30,363
1993	893.3	55.0	948.3	33.2	26.3	32.8	29,652	1,449	31,101
1994	881.7	55.1	936.8	33.4	27.7	33.0	29,405	1,524	30,929
1995 [2]	8 882.3	55.0	937.3	33.3	28.3	33.0	29,386	1,558	30,944

Year [1]	Marketing year average price received by farmers per ton of sugar [3]	Value of production: Of cane used for sugar	Value of production: Of cane used for sugar and seed [4]	Sugar production: Raw value [5]: Total	Sugar production: Raw value [5]: Per ton of cane	Sugar production: Refined basis [6]	Molasses [7]
	Dollars	1,000 dollars	1,000 dollars	1,000 tons	Pounds	1,000 tons	1,000 gallons
1986	27.30	788,678	824,724	3,281	227	3,068	165,970
1987	29.10	816,601	851,864	3,333	238	3,115	165,498
1988	29.40	836,810	877,815	3,398	239	3,178	191,208
1989	29.20	819,057	857,878	3,176	225	2,967	192,741
1990	30.80	815,830	863,498	3,152	238	2,945	176,273
1991	29.00	840,194	878,479	3,430	237	3,208	187,629
1992	28.10	811,350	852,235	3,373	234	3,152	181,868
1993	28.50	846,132	888,285	3,482	235	3,255	194,247
1994	29.20	857,438	900,827	N.A.	N.A.	N.A.	N.A.
1995 [2]	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

[1] In Hawaii, harvest continues throughout the year and production statistics are on a calendar year basis. In other states, harvest is seasonal and the production statistics year relates to the year in which the season begins. [2] Preliminary. [3] Prices do not include Government payments under the Sugar Act. [4] Price per ton of cane for sugar used in evaluating value of production for seed. [5] Raw value is the equivalent in terms of 96° sugar, as defined in the Sugar Act of 1948. [6] Calculated on the basis that 100 pounds of raw sugar is required to produce 93.46 pounds of refined sugar. [7] Excludes edible. N.A. not available.

NASS, Crops Branch, (202) 720–2127.

Table 106.—Sugarcane for sugar and seed: Production and value, by States, crop of 1993–94

State	Sugar: Production: 1993	Sugar: Production: 1994	Sugar: Price per ton: 1993	Sugar: Price per ton: 1994	Sugar: Value of production: 1993	Sugar: Value of production: 1994	Sugar and seed: Value of production [1]: 1993	Sugar and seed: Value of production [1]: 1994
	1,000 tons	1,000 tons	Dollars	Dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars
FL	14,512	14,218	30.40	30.60	441,185	435,010	460,821	457,072
HI	5508 5,508	5,268	29.80	30.40	163,037	160,088	165,838	163,068
LA	8220 8,220	8,589	25.00	25.90	205,500	222,455	222,800	240,145
TX	1,412	1,304	25.80	29.80	36,430	38,887	37,126	40,544
Total	29,652	29,405	28.50	29.20	846,132	857,439	886,285	900,827

[1] Price per ton of cane for sugar used in evaluating value of production for seed.

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Table 107.—Sugarcane for sugar and seed: Area, yield, and production, by States, 1993–95

State	Area harvested: 1993	Area harvested: 1994	Area harvested: 1995 [2]	Yield of cane per acre: 1993	Yield of cane per acre: 1994	Yield of cane per acre: 1995 [2]	Cane production: 1993	Cane production: 1994	Cane production: 1995 [2]
	Sugarcane for sugar and seed [1]								
	1,000 acres	1,000 acres	1,000 acres	Tons	Tons	Tons	1,000 tons	1,000 tons	1,000 tons
For sugar:									
FL	425.0	423.0	427.0	34.1	33.6	34.0	14,512	14,218	14,518
HI	64.8	64.3	46.0	85.0	81.9	90.0	5,508	5,268	4,140
LA	360.0	362.0	368.0	22.8	24.4	25.4	8,220	8,589	9,347
TX	43.5	42.4	41.3	32.5	31.5	30.4	1,412	1,304	1,381
US	893.3	881.7	882.3	33.2	33.4	33.3	29,652	29,405	29,386
For seed:									
FL	19.0	21.0	18.0	33.7	34.3	34.0	640	721	612
HI	5.1	5.0	4.0	19.2	19.5	27.5	98	98	110
LA	30.0	28.0	32.0	22.8	24.4	25.4	684	683	813
TX	0.9	1.1	1.0	30.0	20.0	23.0	27	22	23
US	55.0	55.1	55.0	26.3	27.7	28.3	1,449	1,524	1,558
For sugar and seed:									
FL	444.0	444.0	445.0	34.1	33.6	34.0	15,152	14,937	15,130
HI	69.9	69.3	50.0	80.2	77.4	85.0	5,606	5,364	4,250
LA	390.0	390.0	400.0	22.8	24.4	25.4	8,904	9,272	10,160
TX	44.4	43.5	42.3	32.4	31.2	33.2	1,439	1,356	1,404
US	948.3	936.8	937.3	32.8	33.0	33.0	31,101	30,929	30,944

[1] In Hawaii, harvest continues throughout the year and production statistics are on a calendar year basis. In other states, harvest is seasonal and the production statistics year relates to the year in which the season begins. [2] Preliminary.

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Table 108.—Sugarcane: Area, yield, and production in specified countries, 1992/93–1994/95

Continent and country	Area: 1992/93	Area: 1993/94	Area: 1994/95 [1]	Yield per hectare: 1992/93	Yield per hectare: 1993/94	Yield per hectare: 1994/95 [1]	Production [2]: 1992/93	Production [2]: 1993/94	Production [2]: 1994/95 [1]
	1,000 hectares	1,000 hectares	1,000 hectares	Metric tons	Metric tons	Metric tons	1,000 metric tons	1,000 metric tons	1,000 metric tons
North America:									
Mexico	530	495	510	74.9	68.9	78.4	39,700	34,100	40,000
Hawaii	26	26	19	192.2	183.7	200.5	4,997	4,777	3,810
United States	327	335	331	65.0	65.4	66.2	21,267	21,900	21,890
Total	883	868	860	74.7	71.0	76.4	65,964	60,780	65,700

See footnotes at end of table.

361 856

hectares → acres

hectares x 2.471 = acres

Table 108.—Sugarcane: Area, yield, and production in specified countries, 1992/93–1994/95—Continued

Continent and country	Area 1992/93	Area 1993/94	Area 1994/95[2]	Yield per hectare 1992/93	Yield per hectare 1993/94	Yield per hectare 1994/95[2]	Production[1] 1992/93	Production[1] 1993/94	Production[1] 1994/95[2]
	1,000 hectares	1,000 hectares	1,000 hectares	Metric tons	Metric tons	Metric tons	1,000 metric tons	1,000 metric tons	1,000 metric tons
South America:									
Argentina	280	260	230	51.1	50.4	45.7	14,320	13,100	10,500
Brazil	1,200	1,650	1,770	71.3	54.5	51.4	87,000	90,000	91,000
Colombia	119	132	139	115.7	122.0	123.7	13,763	16,100	17,200
Ecuador	48	43	48	75.3	87.4	76.4	3,612	3,757	3,666
Guyana	42	41	42	73.4	78.4	78.8	3,081	3,215	3,308
Peru	44	48	47	102.4	91.8	106.4	4,507	4,407	5,000
Venezuela	108	105	100	64.5	61.9	66.8	7,001	6,500	6,680
Other S.A	108	109	109	54.4	45.9	44.1	5,880	5,007	4,802
Total	1,970	2,388	2,485	70.7	59.5	57.2	139,184	142,086	142,156
Central America:									
Belize	23	23	24	46.9	52.2	50.0	1,079	1,200	1,200
Costa Rica	36	37	38	78.9	80.7	81.6	2,840	2,987	3,100
El Salvador	45	48	51	92.2	81.3	81.8	4,149	3,900	4,170
Guatemala	125	128	132	82.1	81.0	81.3	10,258	10,373	10,725
Honduras	29	29	29	67.2	66.9	69.0	1,950	1,940	2,000
Nicaragua	36	39	37	64.7	55.9	62.2	2,330	2,180	2,300
Panama	32	30	30	39.7	40.0	41.7	1,270	1,200	1,250
Total	326	334	341	73.2	71.2	72.6	23,876	23,780	24,745
Caribbean:									
Cuba	1,350	1,150	1,150	45.9	41.0	40.0	62,000	47,150	46,000
Dominican Republic	207	215	210	32.1	34.3	33.8	6,644	7,368	7,100
Haiti	50	50	50	10.5	10.5	10.5	525	525	525
Jamaica	42	42	42	60.1	65.0	65.0	2,525	2,732	2,732
Other Caribbean	65	68	63	48.8	47.5	49.8	3,171	3,229	3,136
Total	1,714	1,525	1,515	43.7	40.0	39.3	74,865	61,004	59,493
Western Europe:									
Spain	2	2	....	85.0	85.0	....	170	170	....
Africa:									
Egypt	90	95	96	88.1	92.9	93.0	7,929	8,821	8,930
Ethiopia	25	25	25	92.0	92.0	92.0	2,300	2,300	2,300
Cote d'Ivoire	38	38	38	92.1	92.1	92.1	3,500	3,500	3,500
Kenya	46	49	50	93.1	75.6	75.9	4,283	3,705	3,793
Mauritius	80	80	80	80.0	72.3	81.3	6,400	5,781	6,500
Reunion	33	35	35	60.6	64.9	62.9	2,000	2,270	2,200
South Africa	276	275	266	72.7	47.1	42.3	20,078	12,955	11,240
Sudan	50	50	50	100.0	100.0	100.0	5,000	5,000	5,000
Swaziland	37	37	37	106.5	106.5	102.7	3,941	3,941	3,800
Zimbabwe	26	14	9	74.1	8.9	59.8	1,927	125	538
Other Africa	268	269	270	49.2	49.1	48.8	13,182	13,199	13,189
Total	969	967	956	72.8	60.7	63.8	70,540	61,597	60,990
Asia:									
Bangladesh	50	90	90	53.2	29.7	29.7	2,660	2,670	2,670
China	1,164	1,249	1,088	58.3	58.6	59.0	67,898	73,011	64,194
India	2,260	1,990	1,900	65.8	62.3	65.2	148,814	123,965	123,958
Indonesia	385	404	415	73.0	79.2	79.5	28,100	32,000	33,000
Japan	30	29	26	63.1	63.5	63.0	1,894	1,778	1,634
Malaysia	20	18	18	52.5	59.2	63.3	1,050	1,065	1,140
Pakistan	572	634	769	43.3	43.0	45.0	24,798	27,276	34,600
Philippines	371	377	375	61.5	63.3	60.7	22,816	23,850	22,500
Taiwan	58	57	58	92.9	75.2	77.6	5,387	4,285	4,500
Thailand	940	900	945	50.5	38.6	39.8	47,505	34,711	37,500
Vietnam	144	135	120	42.6	43.7	44.2	6,131	5,900	5,300
Other Asia	44	46	46	40.5	39.5	38.8	1,780	1,815	1,785
Total	6,028	5,913	5,839	59.5	56.2	57.0	358,751	[illegible]	330,023
Oceania:									
Australia	341	339	340	62.5	88.1	94.0	21,306	[illegible]	31,951
Fiji	60	60	60	56.3	56.8	61.7	3,380	[illegible]	3,700
Total	401	399	400	61.6	82.5	89.1	24,686	[illegible]	[illegible],651
Grand total	[illegible]	[illegible]	12,478	61.3	57.9	58.0	758,134	[illegible]	[illegible]

Table 109.—Sugar: Production in specified countries, 1992/93–1994/95[1]

Continent and country	1992/93	1993/94	1994/95[2]
CENTRIFUGAL SUGAR (raw value)[3]	1,000 metric tons	1,000 metric tons	1,000 metric tons
North and Central America and Caribbean:			
Canada	118	113	171
Costa Rica	302	322	337
Cuba	4,280	4,000	3,300
Dominican Republic	618	580	485
El Salvador	329	319	312
Guatemala	1,104	1,118	1,276
Honduras	186	195	214
Jamaica	224	220	212
Mexico	4,330	3,780	4,556
Nicaragua	177	186	221
Panama	145	142	145
Trinidad and Tobago	108	127	125
Puerto Rico	59	48	42
United States	7,052	6,899	7,204
Other North and Central America and Caribbean	300	296	273
Total	19,273	18,296	18,830
South America:			
Argentina	1,350	1,080	1,180
Brazil	9,800	9,930	12,400
Chile	526	490	505
Colombia	1,798	1,847	2,040
Ecuador	380	362	330
Guyana	254	257	258
Peru	415	588	620
Venezuela	525	510	530
Other S.A	468	424	408
Total	15,519	15,488	18,288
European Community:			
Belgium-Luxembourg	970	1,134	943
Denmark	447	568	487
France	4,723	4,725	4,389
Germany	4,401	4,738	3,985
Greece	385	308	270
Ireland	242	192	232
Italy	2,032	1,541	1,621
Netherlands	1,250	1,232	1,050
Portugal	2	4	4
Spain	1,037	1,344	1,214
United Kingdom	1,590	1,581	1,373
Other Western Europe	1,083	1,217	1,080
Total Western Europe[4]	18,142	18,580	16,638
Albania	10	10	10
Bulgaria	31	10	13
Czechoslovakia	685	576	420
Hungary	380	273	425
Poland	1,567	2,170	1,482
Romania	243	135	212
Slovakia	182	151	130
Yugoslavia	450	200	340
Total Eastern Europe	3,408	3,525	3,042
Baltics:			
Latvia	35	35	30
Lithuania	60	75	50
Total Baltics	95	110	80
FSU—12:			
Byelarus	110	130	90
Kazakhstan	137	107	80
Kyrgyzstan	13	20	11
Moldova	200	200	160
Russian Federation	2,540	2,500	1,655
Ukraine	3,965	4,188	3,300
Total FSU—12	6,965	7,145	5,270
Africa:			
Cote D'Ivoire	139	170	150
Egypt	1,015	1,050	1,088
Ethiopia	200	200	200
Reunion	372	382	322
Sudan	681	604	532
Swaziland	241	189	158
Kenya	1,600	1,243	1,766
Mauritius	500	550	550
South Africa	525	482	495
Zimbabwe	6	56	553
Other Africa	1,458	1,644	1,850
Total Africa	6,937	6,570	7,454
Asia:			
Bangladesh	200	233	288
China (Mainland)	8,300	6,506	6,000
India	12,456	11,650	16,345
Indonesia	2,300	2,480	2,458
Japan	893	842	817
Malaysia	108	114	108
Pakistan	2,562	3,128	3,212
Philippines	2,080	1,809	1,850
Taiwan	426	498	435
Thailand	3,750	3,975	5,446
Vietnam	485	430	450
Other Asia	329	333	367
Total Asia	33,667	32,005	37,540
Oceania:			
Australia	4,367	4,412	5,082
Fiji	441	458	535
Total Oceania	4,808	4,870	5,617
World total	111,988	109,638	115,433

[1] Crop years are on a September/August basis, but include the outturn of sugar from harvests of several Southern Hemisphere countries which begin prior to September. [2] Preliminary. [3] Centrifugal sugar, as distinguished from non-centrifugal, includes cane and beet sugar produced by the centrifugal process, which is the principal kind moving in international trade. [4] Total Western Europe includes Austria, Finland, Sweden, and non-EU member Switzerland.

FAS, Production Estimates and Crop Assessment Division, (202) 720-0888. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Counselors, Attaches, and Foreign Service Officers, results of office research, and related information.