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Sugar and Sweeteners Outlook

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The USDA Acts To Increase Sugar Availability

During the months of August and September 2005, the U.S. Department of Agriculture (USDA) announced a number of actions concerning the sugar marketing allotment program and the sugar tariff-rate quota (TRQ) for fiscal years (FY) 2005 and 2006. These actions were made in response to two events: (1) a perceived shortage of sugar in the U.S. market due to an expectation of lower beet sugar production in September 2005, on top of strong domestic demand and reduced raw cane sugar production in Florida and Louisiana during FY 2005, due to hurricanes and other weather-related events; and (2) the closure of two sugar refineries in Louisiana due to Hurricane Katrina. Announcements made prior to August 30 were influenced by the events described under item number 1, and announcements made on and after August 30 dealt more specifically with the shortage of refined sugar caused by Katrina.

Citing conditions that had led to a tight sugar market, USDA decided to increase the FY 2005 Overall Allotment Quantity (OAQ) on August 12 by 250,000 short tons, raw value (STRV) to 8.350 million STRV. On August 19, USDA announced the reassignment of allocations among sugarbeet and sugarcane processors, and also reassigned the expected unused cane sugar allocation to FY 2005 Commodity Credit Corporation (CCC) sales and imports. In order to accommodate this last reassignment, USDA increased the FY 2005 TRQ by 84,447 STRV to 1,315,944 STRV.

On August 12, 2005, the USDA also set the OAQ for FY 2006 at 8,600,000 STRV. The OAQ calculation was based on the *World Agricultural Supply and Demand Estimates* (*WASDE*) report projection of domestic sugar food and beverage use of 9.950 million STRV, less the amount of sugar expected from alternative (non-OAQ) sources. The OAQ was allocated to the beet sugar sector at 4.674 million STRV and to the raw cane sugar sector at 3.926 million STRV. The USDA determined that FY 2006 domestic cane sugar production would be insufficient to meet its allocation under the OAQ. On August 19, 2004, USDA fixed the reassigned cane portion at 120,000 STRV and reassigned it to the FY 2006 raw sugar TRQ. The FY 2006 raw sugar TRQ, which had been set on August 12 to 1,231,497 STRV (the minimum amount to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreements was increased to 1,351,497 STRV.

Hurricane Katrina initially halted operations at two Louisiana sugar refineries in Chalmette and Gramercy. Although operations soon resumed at Gramercy, the Chalmette refinery remains out of operation indefinitely, lowering refined sugar availability by about 90,000 STRV a month. On August 30, 2005, USDA responded to the effects of Katrina by increasing the FY 2005 OAQ by 225,000 STRV. On September 9, 2005, USDA once again increased the FY 2005 OAQ, this time by 105,000 STRV. The USDA expects these actions to permit additional beet sugar deliveries of 128,068 STRV before the end of the fiscal year.

In the August 30, 2005, OAQ announcement, USDA allowed the early entry of refined sugar under the FY 2006 refined sugar TRQ, beginning on September 8. On September 9, 2005, USDA increased the FY 2006 refined sugar TRQ by 75,000 STRV and specified that it could enter prior to the start of the fiscal year.

On September 12, 2005, USDA released its latest estimate of FY 2005 supply and use and its projections for FY 2006 in the *WASDE*. The USDA estimates FY 2005 sugar production at 7.950 million STRV, comprised of 4.623 million STRV of beet sugar and 3.327 million of raw cane sugar. The USDA projects FY 2006 sugar production at 7.964 million STRV, about the same as FY 2005. Beet sugar production is forecast at 4.375 million STRV (248,000 STRV lower than FY 2005) and cane sugar production is forecast at 3.589 million STRV (262,000 STRV higher than FY 2005).

TRQ sugar estimated for entry in FY 2005 is 1.404 million STRV. Expected raw sugar TRQ imports are 1.266 million STRV, and expected refined sugar TRQ imports are 138,000. These refined sugar imports include early entries from the FY 2006 refined sugar TRQ and additional specialty sugar added to the FY 2005 refined sugar TRQ in August.

TRQ sugar projected for entry in FY 2006 is 1.412 million STRV. With shortfall projected at 50,000 STRV, the raw sugar TRQ entries are projected at 1.301 million STRV. The sugar expected to enter under the terms of the Central American Free Trade Agreement, including the Dominican Republic (CAFTA), is projected at 70,000 STRV. Refined sugar TRQ entries in FY 2006 are projected at 41,012 STRV.

The USDA estimates high-tier imports for FY 2005 at 107,000 STRV and projects FY 2006 high-tier imports at 50,000 STRV. Most of these imports are expected from Mexico. There has been no USDA announcement regarding Mexico's net producer status for FY 2006.

With 2 months of data remaining, USDA estimates FY 2005 deliveries for domestic food and beverage use at 9.875 million STRV. The USDA projects FY 2006 sugar deliveries for food and beverage use at 9.950 million STRV. The USDA estimates FY 2005 ending stocks at 1.528 million STRV, implying an ending stocks-to-use ratio of 14.86 percent. For FY 2006, ending stocks are projected at 1.014 million STRV, implying an ending stocks-to-use ratio of 9.83 percent. The last time the ending stocks-to-use ratio was below this forecast level was in FY 1974 when the ratio was 8.83 percent.

U.S. Sugar

Sugar Marketing Allotments and Tariff-Rate Quotas

During the months of August and September 2005, the U.S. Department of Agriculture (USDA) announced a number of actions concerning the sugar marketing allotment program and the sugar tariff-rate quota (TRQ) for fiscal years (FY) 2005 and 2006 (table 1). These actions were made in response to two events: (1) a perceived shortage of sugar in the U.S. market due to an expectation of lower beet sugar production in September 2005, on top of strong domestic demand and reduced raw cane sugar production in Florida and Louisiana during FY 2005, due to hurricanes and other weather-related events; and (2) the closure of two sugar refineries in Louisiana due to Hurricane Katrina. Announcements made prior to August 30 were influenced by the events described under item number 1, and announcements made on and after August 30 dealt more specifically with the shortage of refined sugar.

Responses to Lower-Than-Expected Sugar Availability Prior to Hurricane Katrina

The Overall Allotment Quantity (OAQ) for FY 2005 was initially set at 8,100,000 short tons, raw value (STRV) on July 16, 2004. This OAQ level was chosen to fulfill the 2002 Farm Act requirement that, to the maximum extent possible, the sugar loan program is operated at no-cost to the Federal Government by minimizing the possibility of forfeiture of sugar pledged as collateral to the Commodity Credit Corporation (CCC). From July through October 2004, the USDA projected FY 2005 ending stocks at more than 2.1 million STRV in the *World Agricultural Supply and Demand Estimates (WASDE)* report. These projected stock levels implied higher-than-average ending stocks-to-use ratios above 21 percent, indicating a likelihood of forfeiture of sugar.

During the course of the year, factors affecting the supply and utilization changed (table 2). Compared with projections published in the October 2004 *WASDE*, projections of cane sugar production were down 318,000 STRV in Florida by December 2004 and 245,000 STRV in Louisiana by January 2005. Starting in October 2004, sugar deliveries for domestic food and beverage use were clearly higher than corresponding levels for the three preceding fiscal years. In the March 2005 *WASDE*, the USDA increased its deliveries' projection by 100,000 STRV and increased it another 60,000 STRV in the May 2005 *WASDE*. By August 2005, hot, dry weather in Minnesota was lessening chances for realizing expected beet sugar production levels in September.

Ending year stock projections reflected the change in supply and use, dropping from above 21 percent in October 2004 to the 13-14 percent range by April 2005. Additionally, raw sugar prices (No.14 Contract, nearby futures) were averaging above 21 cents a pound by April 2005, and refined beet sugar spot prices (low end of Midwest range, *Milling and Baking News*) were averaging above 25 cents a pound by June 2005.

Table 1--Sugar program announcements for fiscal years 2005 and 2006

Overall Allotment Quantity

Date	Change in OAQ	New total OAQ	Change in beet allotment	New beet allotment	Change in cane allotment	Reassignment -- cane allotment	New cane allotment
				short tons, raw value			
For fiscal year 2005:							
07/16/05	--	8,100,000	--	4,402,350	--	--	3,697,650
08/12/05	250,000	8,350,000	135,875	4,538,225	114,125	--	--
08/19/05						141,567 (17,120 -- CCC sales; 40,000 to high-tier NAFTA; 84,447 to raw sugar TRQ)	3,670,208
08/30/05	225,000	8,575,000	122,288 (only 71,000 expected to be delivered)	4,660,513	102,713	102,713 (reassigned to imports: refined TRQ and high-tier NAFTA)	3,670,208
09/09/05	105,000	8,680,000	57,068	4,717,580	47,933	47,933 (reassigned to imports)	3,670,208
For fiscal year 2006:							
08/12/05	--	8,600,000	--	4,674,100	--	120,000 (reassigned to raw TRQ)	3,805,900

Sugar Tariff-Rate Quota

Date	Change in TRQ	New total TRQ	Change in raw sugar TRQ	New raw sugar TRQ	Change in refined TRQ	New refined sugar TRQ	Note
				short tons, raw value			
For fiscal year 2005:							
07/16/05	--	1,278,896	--	1,231,497	--	47,399	
08/12/05	2,205	1,281,101	--	1,231,497	2,205	49,604	(specialty sugar)
08/19/05	84,447	1,365,548	84,447	1,315,944	--	49,604	
08/23/05	-- USTR allocates 84,447 STRV of sugar TRQ and reallocates estimated raw sugar TRQ shortfall of 58,873 STRV --						
For fiscal year 2006:							
08/12/05	--	1,285,510	--	1,231,497	--	54,013	
08/19/05	120,000	1,405,510	120,000	1,351,497	--	54,013	
08/30/05	-- USTR allocates raw and refined sugar TRQ --						
08/30/05	-- USDA allows early-entry as 9/08/2005 of refined sugar TRQ. --						
09/09/05	75,000	1,480,510	--	1,351,497	75,000	129,013	(99,251 of refined sugar allowed early entry)

Sources: USDA, USTR.

Table 2--Monthly estimates of fiscal 2005 U.S. sugar supply and use

	Oct. 2004	Nov. 2004	Dec. 2004	Jan. 2005	Feb. 2005	Mar. 2005	Apr. 2005	May 2005	June 2005	July 2005	Aug. 2005	Sept. 2005
Beginning stocks	2,105	1,907	1,897	1,897	1,897	1,897	1,897	1,897	1,897	1,897	1,897	1,897
Total production	8,569	8,508	8,235	8,143	8,118	8,117	8,053	8,067	8,067	8,109	8,052	7,950
Beet sugar	4,567	4,697	4,697	4,705	4,699	4,727	4,685	4,693	4,693	4,721	4,716	4,623
Cane sugar	4,002	3,811	3,538	3,438	3,418	3,390	3,368	3,374	3,374	3,389	3,335	3,327
Florida	2,011	1,888	1,693	1,694	1,689	1,679	1,679	1,684	1,684	1,690	1,690	1,692
Louisiana	1,535	1,467	1,391	1,290	1,290	1,260	1,260	1,263	1,263	1,271	1,218	1,207
Texas	170	170	179	180	180	180	158	158	158	160	160	160
Hawaii	286	286	274	274	259	271	271	269	269	268	268	268
Puerto Rico	0	0	0	0	0	0	0	0	0	0	0	0
Total imports	1,629	1,629	1,639	1,639	1,639	1,639	1,639	1,639	1,639	1,729	1,769	1,961
Tariff-rate quota imports	1,229	1,229	1,229	1,229	1,229	1,229	1,229	1,229	1,229	1,209	1,209	1,404
Other program imports	350	350	350	350	350	350	350	350	350	400	400	400
Non-program imports	50	50	60	60	60	60	60	60	60	120	160	157
Total supply	12,304	12,044	11,771	11,680	11,654	11,653	11,589	11,603	11,603	11,736	11,718	11,808
Exports	200	200	200	200	200	200	200	240	240	240	240	240
Adjustments	0	0	0	0	0	0	0	0	0	0	0	0
Total deliveries	9,905	9,905	9,905	9,905	9,905	9,980	9,980	10,020	10,020	10,020	10,030	10,040
Domestic food and beverage	9,715	9,715	9,715	9,715	9,715	9,815	9,815	9,875	9,875	9,875	9,875	9,875
Other use	190	190	190	190	190	165	165	145	145	145	155	165
Total use	10,105	10,105	10,105	10,105	10,105	10,180	10,180	10,260	10,260	10,260	10,270	10,280
Ending stocks	2,199	1,939	1,666	1,575	1,549	1,473	1,409	1,343	1,343	1,476	1,448	1,528
Stocks/use ratio	21.76	19.19	16.49	15.58	15.33	14.47	13.84	13.09	13.09	14.38	14.10	14.86

NA = Not available.

Source: *WASDE* , USDA.

Citing conditions that had led to a tight sugar market, the USDA decided to increase the FY 2005 OAQ on August 12 by 250,000 STRV to 8.350 million STRV. As set out in the 2002 Farm Act, the increase was allocated to beet sugar at 135,875 STRV (54.35 percent of the OAQ) and to raw cane sugar at 114,125 STRV (45.65 percent). On August 19, the USDA announced the reassignment of allocations among sugarbeet and sugarcane processors, and also reassigned the expected unused cane sugar allotment of 141,567 STRV to FY 2005 CCC sales (17,120 STRV), North American Free Trade Agreement (NAFTA) high-tier imports (40,000 STRV), and the raw sugar TRQ (84,447 STRV). In order to accommodate this last reassignment, the USDA increased the FY 2005 TRQ by 84,447 STRV to 1,315,944 STRV. On August 23, 2005, the U.S. Trade Representative (USTR) allocated the TRQ increase among eligible countries having sugar to ship and also reallocated 58,873 STRV of sugar from countries unable to fill their original FY 2005 quota allotments (table 3). [1/]

On August 12, 2005, the USDA also set the OAQ for FY 2006 at 8,600,000 STRV. The OAQ calculation was based on the *WASDE* projection of domestic sugar food and beverage use of 9.950 million STRV, less the amount of sugar expected from alternative (non-OAQ) sources. The OAQ was allocated to the beet sugar sector at 4.674 million STRV and to the raw cane sugar sector at 3.926 million STRV. However, the USDA determined that FY 2006 domestic cane sugar production would be insufficient to meet its OAQ allotment, and therefore assigned a portion of the deficit to imports.

On August 19, 2004, the USDA fixed the reassigned cane portion at 120,000 STRV and reassigned it to the FY 2006 raw sugar TRQ. The FY 2006 raw sugar TRQ, which had been set on August 12 to 1,231,497 STRV (the minimum amount to which the United States is committed under the World Trade Organization (WTO) Uruguay Round Agreements) increased to 1,351,497 STRV. On August 30 the USTR allocated the raw sugar TRQ (table 4). The USTR also allocated portions of the refined sugar TRQ, which had been set at 54,013 STRV by the USDA on August 12. [2/]

Responses to the Effects of Hurricane Katrina

Hurricane Katrina initially halted operations at two Louisiana sugar refineries in Chalmette and Gramercy. Although operations soon resumed at Gramercy, the Chalmette refinery remains out of operation indefinitely, lowering refined sugar availability by about 90,000 STRV a month. The task facing the USDA was to increase the short-run availability of refined sugar, either domestic refined beet sugar or imported refined sugar (beet or cane).

On August 30, 2005, the USDA responded to the effects of Katrina by increasing the FY 2005 OAQ by 225,000 STRV. Although the refined beet sugar share of the OAQ increase was 122,288 STRV, beet processors maintained that they could only deliver 71,000 STRV. On September 9, 2005, the USDA once again increased the FY 2005 OAQ, this time by 105,000 STRV. Although beet processors had earlier maintained their inability to supply the market, this time they stated that they could make available the full share of their 57,068 STRV allotment. Because cane processors had no available sugar, their allotment was assigned to imports.

[1/] Unrelated to these events, the USDA increased the specialty sugar component of the FY 2005 refined sugar TRQ by 2,205 STRV. This increase was intended to accommodate the expansion of the U.S. market for organic sugar. This sugar was allowed entry as of August 30, 2005.

[2] The FY 2006 refined sugar TRQ includes the minimum WTO Uruguay Round Agreement commitment level of 24,251 STRV, portions of which are reserved for Canada (11,354 STRV), Mexico (3,256 STRV), and "first-come, first-served" specialty sugar (1,825 STRV). The refined sugar TRQ includes an additional amount of 29,762 STRV above the minimum commitment level, reserved for specialty (organic) sugar.

Table 3--U.S. raw sugar tariff-rate quota for FY 2005 after Aug. 2005 reassignment

Country	Initial FY05 Allocations	Addition 8/23/2005	Suspension 8/23/2005	New FY2005 Total
	Metric tons, raw value			
Argentina	45,281	8,890		54,171
Australia	87,402	17,159		104,561
Barbados	7,371	0	-7,371	0
Belize	11,583	2,274		13,857
Bolivia	8,424	1,654		10,078
Brazil	152,691	29,977		182,668
Colombia	25,273	4,962		30,235
Congo	7,258			7,258
Costa Rica	15,796	0		15,796
Cote d'Ivoire	7,258			7,258
Dominican Republic	185,335	1,220		186,555
Ecuador	11,583	2,274		13,857
El Salvador	27,379	5,375		32,754
Fiji	9,477	1,861		11,338
Gabon	7,258		-7,258	0
Guatemala	50,546	9,923		60,469
Guyana	12,636	2,481		15,117
Haiti	7,258		-7,258	0
Honduras	10,530	2,067		12,597
India	8,424		-8,260	164
Jamaica	11,583	0	-8,633	2,950
Madagascar	7,258			7,258
Malawi	10,530	0		10,530
Mauritius	12,636	2,481		15,117
Mexico	7,258			7,258
Mozambique	13,690	2,688		16,378
Nicaragua	22,114	4,342		26,456
Panama	30,538	5,995		36,533
Papua New Guinea	7,258			7,258
Paraguay	7,258			7,258
Peru	43,175	8,476		51,651
Philippines	142,160	0		142,160
South Africa	24,220	4,755		28,975
St. Kitts & Nevis	7,258		-7,258	0
Swaziland	16,849	3,308		20,157
Taiwan	12,636	2,481		15,117
Thailand	14,743	2,894		17,637
Trinidad-Tabago	7,371	0	-7,371	0
Uruguay	7,258			7,258
Zimbabwe	12,636	2,481		15,117
Total	1,117,192	130,018	-53,409	1,193,801

Source: USTR.

Table 4--FY 2006 raw sugar tariff-rate quota allocation

Countries	Allocations	
	metric tons, raw value	short tons, raw value
Argentina	50,000	55,115
Australia	96,511	106,384
Barbados	8,139	8,972
Belize	12,791	14,100
Bolivia	9,302	10,254
Brazil	168,603	185,851
Colombia	27,907	30,762
Congo	7,258	8,000
Cote D'Ivoire	7,258	8,000
Costa Rica	17,442	19,226
Dominican Republic	204,649	225,585
Ecuador	12,791	14,100
El Salvador	30,232	33,325
Fiji	10,465	11,536
Gabon	7,258	8,000
Guatemala	55,813	61,523
Guyana	13,953	15,380
Haiti	7,258	8,000
Honduras	11,628	12,818
India	9,302	10,254
Jamaica	12,791	14,100
Madagascar	7,258	8,000
Malawi	11,628	12,818
Mauritius	13,953	15,380
Mexico	7,258	8,000
Mozambique	15,116	16,662
Nicaragua	24,418	26,916
Panama	33,721	37,171
Papua New Guinea	7,258	8,000
Paraguay	7,258	8,000
Peru	47,674	52,551
Philippines	156,975	173,034
South Africa	26,744	29,480
St. Kitts & Nevis	7,258	8,000
Swaziland	18,604	20,507
Taiwan	13,953	15,380
Thailand	16,279	17,944
Trinidad-Tobago	8,139	8,972
Uruguay	7,258	8,000
Zimbabwe	13,953	15,380
Total	1,226,056	1,351,482

Source: USTR.

In the August 30, 2005, OAQ announcement, the USDA allowed the early entry of refined sugar under the FY 2006 refined sugar TRQ, beginning on September 8. On September 9, 2005, the USDA increased the FY 2006 refined sugar TRQ by 75,000 STRV and specified that it could enter prior to the start of the fiscal year.

Production

The USDA adopts the production estimates and projections provided by beet sugar processors and cane sugar millers to the USDA's Farm Service Agency (FSA). Processors and millers estimate FY 2005 sugar production at 7.950 million STRV. It is comprised of 4.623 million STRV of beet sugar and 3.327 million of raw cane sugar. Processors and millers project FY 2006 sugar production at 7.964 million STRV, about the same as FY 2005. However, the composition is different: beet sugar is forecast at 4.375 million STRV (248,000 STRV lower) and cane sugar is forecast at 3.589 million STRV (262,000 STRV higher).

Beet Sugar Production

The National Agricultural Statistics Service (NASS) forecasts sugarbeet area planted for FY 2006 at 1.299 million acres, down about 47,000 acres from the previous year. The largest reductions are in Idaho (22,000 acres) and in Michigan (16,000 acres). NASS forecasts sugarbeet area harvested at 1.243 million acres, down 64,000 acres from last year. In addition to Idaho and Michigan, area harvested is forecast down in Minnesota (6,000 acres) and in North Dakota (6,000 acres). The national yield is forecast at 21.7 tons, down from the high yield last year of 22.9 tons. Sugarbeet production is forecast at 26,296 tons, down by 12.2 percent from last year.

The beet processors' forecast of FY 2006 beet sugar production at 4.375 million STRV indicates sugar recovery per harvested acre of 3.520 STRV, which is only slightly less than the high level of 3.537 estimated for FY 2005.

Table 5 shows an efficiency measure of the U.S. beet sugar industry from the 1992/93 crop year through 2004/05 (the 2005/06 figures are projections). The measure is the ratio of the September/August crop year sugar recovery to the NASS estimate of sucrose content. The higher the rate, the higher the extraction of sucrose contained in the beet crop. The average rate for the period has been 0.873. An Economic Research Service regression model suggests that the efficiency measure is a negative function of the size of the sugarbeet crop (elasticity coefficient = -0.11) and a positive function of the recovery rate (elasticity coefficient = 0.54). The model explains 89 percent of the observed variation in the efficiency measure from 1992/93 to 2004/05. Assuming the parameter values in the table for 2005/06, the model would predict a record high efficiency level of 0.938. This would imply a near-record high sucrose level for the 2005/06 crop of 17.73 percent. Clearly, beet sugar processors expect an above-average performance in 2005/06 in order to achieve the beet sugar projection of 4.375 million STRV.

Another ERS model projects sugar per harvested acre as a function of the sugarbeet yield and trend.[3/] It explains about 84 percent of the observed variation. In a simulation exercise involving this equation and the NASS area harvested forecast of 1.243 million acres, the expected value of FY 2006 beet sugar production is forecast

[3/] Sugar Yield = 0.1164*Sugarbeet yield + .0234*yearly trend variable (2005/06 = 36), standard error of regression = 0.1137; forecast value for FY 2006 = 3.305 tons/acre.

Table 5--U.S. sugarbeet crop, beet sugar production, sucrose content, and recovery

Sept./Aug. crop year	Sugarbeet production	Crop year beet sugar production	Crop year beet recovery rate	Sucrose content of beets	Recovery efficiency
	-- tons --		--- percent ---		--- ratio ---
1992/93	29,143	4,478	15.36	17.28	0.889
1993/94	26,249	3,965	15.10	17.13	0.882
1994/95	31,853	4,577	14.37	16.65	0.863
1995/96	28,065	3,944	14.05	16.29	0.863
1996/97	26,680	4,042	15.15	17.14	0.884
1997/98	29,886	4,272	14.29	16.94	0.844
1998/99	32,499	4,410	13.57	16.70	0.813
1999/00	33,420	4,931	14.75	17.15	0.860
2000/01	32,541	4,766	14.65	17.27	0.848
2001/02	25,764	4,019	15.60	17.15	0.909
2002/03	27,707	4,220	15.23	16.92	0.900
2003/04	30,710	4,912	15.99	17.74	0.902
2004/05 (estimated)	29,956	4,601	15.36	17.34	0.886
2005/06 (projected) 1/	26,296	4,375	16.64	17.73	0.938

1/ Projected based on beet processors' forecast of sugar production in Sept. 2005 *WASDE* and NASS sugarbeet forecast (Sept. 2005 *Crop Production*).
Source: USDA.

at 4.108 million STRV. This forecast has a standard error of 140.85, implying that an interval forecast of 95-percent statistical significance of U.S. beet sugar production to be between 3.832 and 4.384 million STRV. The beet processors' forecast of 4.375 lies in the extreme upper range of this interval.

Cane Sugar Production

In NASS' September 12 *Crop Production*, the forecast of Louisiana's sugarcane for sugar and seed crop is 10.920 million tons, a decrease of 8.7 percent from the August forecast of 11.960 million tons. Forecasted area harvested decreased from 460,000 to 455,000 acres, and forecasted yield decreased from 26.0 to 24.0 tons per acre. Because the USDA had not received specific information from processors regarding the effect of Hurricane Katrina on expected sugar production, the percentage decrease of 8.7 percent for sugarcane was applied to last month's forecast of Louisiana sugar production to arrive at 1.256 million STRV.

In the latest Farm Service Agency (FSA) survey, Florida cane sugar millers project FY 2006 sugar production at 1.899 million STRV. NASS forecasts Florida sugarcane acreage harvested for sugar and seed at 420,000 acres, an increase of 14,000 acres over last year's area. NASS forecasts yield at 37.0 tons per acre, implying sugarcane for sugar and seed production at 15.540 million tons, an increase of 8.8 percent from the previous year. Assuming that the FY 2006 sugarcane for seed is about the same as that for FY 2005 at 5.17 percent, sugarcane for sugar production is forecast at 14.737 million tons. The millers' production forecast implies a recovery of 12.89 percent, which is only slightly higher than the average recovery for the past 5 years.

The cane sugar miller in Texas projects FY 2006 sugar production at 180,000 STRV, up about 20,000 STRV from FY 2005. NASS forecasts area harvested for sugar and seed at 44,000 acres, the same as in FY 2005. Sugarcane for sugar and seed production is forecast at 1.624 million tons, which is fairly close to that produced in FY 2005. If area for seed is assumed to be the same as in FY 2005 at 2.95 percent, then the implied sugar recovery is 11.42 percent, which is close to the record rate of 11.68 percent set in FY 2001.

Hawaiian cane sugar millers project FY 2006 sugar production at 254,000 STRV. Because Hawaiian production follows the calendar year, the bulk of the projected harvest season takes place in 2006, and no NASS sugarcane forecasts are available.

Trade

TRQ sugar estimated for entry in FY 2005 is 1.404 million STRV. TRQ entries are comprised of raw sugar and refined sugar. Until August 19, the raw sugar TRQ was 1,231,497 STRV as established in July 2004. On August 19, the raw sugar TRQ was increased 84,447 STRV due to the reassignment of cane sugar that was deemed unavailable to meet the cane sector's OAQ allocation. With the raw sugar shortfall estimated at 50,000 STRV, expected raw sugar TRQ imports are 1,265,944 STRV.

Refined sugar TRQ imports are the sum of amounts established under the FY 2005 refined sugar TRQ and expected early entry refined sugar from the FY 2006 refined sugar TRQ. Amounts associated with the FY 2005 TRQ are specialty sugars--27,178 STRV, and components of the non-specialty portion. These portions include amounts allocated to Canada—11,354 STRV, to Mexico—3,256 STRV, and globally (i.e., first-come, first-serve)—7,815 STRV. These sum to 22,425 STRV. Early entry imports from the FY 2006 refined sugar TRQ are estimated at 88,000 STRV. Summing all FY 2005 components (and adjusting for shortfall) produces the 1.404 million STRV figure cited above.

TRQ sugar projected for entry in FY 2006 is 1.412 million STRV. The raw sugar TRQ was set initially at 1,231,497 STRV on August 12, but was increased 120,000 STRV from the reassignment of the unavailable cane sugar portion of the FY 2006 OAQ. With shortfall projected at 50,000 STRV, the raw sugar TRQ entries are projected at 1,301,497 STRV. The implementation of the Central American Free Trade Agreement, including the Dominican Republic (CAFTA-DR), is expected on January 1, 2006. To date, four of the six countries have signed (Nicaragua and Costa Rica have not signed yet). The sugar expected to enter from the already-signed countries totals 70,000 STRV.

FY 2006 refined sugar TRQ entries are specialty sugars--31,587 STRV; and the Canadian, Mexican, and global allocations that are set at the same levels as in FY 2005 less amounts estimated to have entered the United States prior to the start of the new fiscal year (22,425 STRV less 13,000). All of the additional refined sugar TRQ announced on September 9—75,000 STRV is estimated to arrive before FY 2006. Total refined sugar TRQ entries in FY 2006 are therefore projected at 41,012 STRV. Adding this amount to projected raw sugar TRQ entries yields the 1.412 million STRV amount.

The USDA estimates high-tier imports for FY 2005 at 107,000 STRV. This total is comprised of 80,000 STRV bulk raw sugar and 27,000 STRV refined sugar. Imports for FY 2006 are projected at 50,000 STRV. In both years, most of the high-tier tariff sugar is NAFTA in origin. (See table 6 for high-tier tariff rates.) There has been no USDA announcement regarding Mexico's net producer status for FY 2006.

Other program sugar imports outside the sugar TRQ for FY 2005 are estimated to total 400,000 STRV, and are projected to total 325,000 STRV for FY 2006. Other USDA import programs include the Refined Sugar Re-export Program, the Sugar-Containing Products Program, and the Polyhydric Alcohol Program. Other imports for FY 2005 are estimated at 50,000 STRV. These include 30,000 STRV of sugar contained in molasses imported for the commercial extraction of refined sugar (HTS 1703.10.30), and 20,000 STRV of sugar in imported syrups (HTS 1702.90.40). These non-program imports for FY 2006 are projected to total 50,000 STRV, comprised of 30,000 STRV of sugar contained in molasses, and 20,000 STRV in sugar syrups.

USDA estimates FY 2005 sugar exports at 240,000 STRV and projects FY 2006 exports at 200,000 STRV. These exports occur under the Refined Sugar Re-export Program. USDA also estimates that deliveries made to domestic food and beverage manufacturers under the Sugar-Containing Products Re-export Program will total 115,000 STRV in FY 2005 and a projected 125,000 STRV in FY 2006.

Deliveries and Sugar-Containing Products

Table 7 shows quarterly estimates of domestic sugar deliveries for food and beverage use (top panel), sugar in imported products (second panel), sugar in exported products (third panel), sugar in USDA's Sugar-Containing Products Re-export Program (fourth panel), and domestic deliveries of sugar for food and beverage use adjusted for trade (bottom panel). For the first three quarters of FY 2005, deliveries for food and beverage use have summed to 7.372 million STRV, an increase of 3.0 percent relative to the same period in FY 2004.

Sugar in imported products has continued its growth but the rate has slowed compared with last year. Sugar in imported products in the first three quarters of FY 2005 has totaled 814,069 STRV, an increase of 5.4 percent relative to the same period in FY 2004. This rate contrasts with the 12.2 percent rate of increase in the first three quarters of FY 2004 relative to FY 2003.

Total adjusted sugar deliveries for domestic food and beverage consumption (bottom panel in table 7 – adjustment made for traded sugar-containing products) show a 2.9 percent increase in total sugar availability for the first three quarters of FY 2005, compared with the same period in FY 2004.

With 2 months of data remaining, the USDA estimates FY 2005 deliveries for domestic food and beverage use at 9.875 million STRV. Deliveries through July have summed to 8.186 million STRV, leaving an estimated 1.689 million STRV to be delivered in August and September. Comparing with August and September deliveries in previous years and considering the strong delivery performance in the first 10 months, there should be little doubt that the estimated total will be reached. What is unknown now, however, is the disruption in refined sugar availability and reduced sweetener demand caused by Hurricane Katrina at the end of August. Nonetheless, due to USDA's response to the disaster by increasing the availability

Table 6--High-tier sugar import tariffs, safeguard duties, and high-tier NAFTA tariffs

Category/sugar values for safeguard duties	Raw sugar 1/		Refined sugar 2/	
	cents/kg	cents/lb	cents/kg	cents/lb
General	33.87	15.36	35.74	16.21
Additive safeguard duties based on sugar unit values of:				
Less than 5 cents/kg (0 to 2.27 cents/lb)	12.90	5.85	21.60	9.80
5 cents/kg or more less than 10 cents/kg (2.27 to 4.54 cents/lb)	8.70	3.95	17.10	7.76
10 cents/kg or more less than 15 cents/kg (4.54 to 6.80 cents/lb)	5.50	2.49	13.10	5.94
15 cents/kg or more less than 20 cents/kg (6.80 to 9.07 cents/lb)	3.00	1.36	9.60	4.35
20 cents/kg or more less than 25 cents/kg (9.07 to 11.34 cents/lb)	1.50	0.68	7.10	3.22
25 cents/kg or more less than 30 cents/kg (11.34 to 13.61 cents/lb)	0.00	0.00	4.60	2.09
30 cents/kg or more less than 35 cents/kg (13.61 to 15.88 cents/lb)	0.00	0.00	3.10	1.41
35 cents/kg or more (15.88 cents/lb or more)	0.00	0.00	0.00	0.00
NAFTA high-tier tariffs:				
2005 3/	9.98	4.53	10.58	4.80
2006	6.66	3.02	7.05	3.20
2007	3.33	1.51	3.53	1.60
2008	0.00	0.00	0.00	0.00

1/ HTS 1701.11.50
2/ HTS 1701.12.50, 1701.91.30, 1701.99.50,1702.90.20, 2106.90.46.
3/ Safeguard duties are not additive to high-tier NAFTA imports.
Source: Harmonized Tariff Schedule for the United States.

Table 7--Estimated U.S. sugar deliveries and sugar in traded sugar-containing products 1/

Fiscal year	Population	Oct.-Dec.	Jan.-Mar.	Apr.-June	July-Sept	FY total	Per capita
		1,000 short tons, raw value (STRV)					pounds (refined value)
Domestic sugar deliveries for food and beverage use							
1993	260.3	2,280	2,046	2,172	2,432	8,930	64.1
1994	263.4	2,277	2,121	2,265	2,533	9,196	65.2
1995	266.6	2,260	2,105	2,311	2,542	9,218	64.6
1996	269.7	2,379	2,191	2,355	2,519	9,445	65.5
1997	272.9	2,430	2,143	2,401	2,591	9,565	65.5
1998	276.1	2,443	2,233	2,428	2,568	9,672	65.5
1999	279.3	2,458	2,208	2,553	2,655	9,873	66.1
2000	282.3	2,580	2,318	2,484	2,611	9,993	66.2
2001	285.0	2,564	2,370	2,486	2,580	10,000	65.6
2002	287.7	2,474	2,227	2,439	2,645	9,785	63.6
2003	290.3	2,497	2,183	2,360	2,464	9,504	61.2
2004	293.0	2,504	2,286	2,368	2,520	9,678	61.7
2005	NA	2,563	2,325	2,483			
Estimated sugar in imported sugar-containing products							
1993	--	73	79	76	70	298	--
1994	--	73	59	64	78	274	--
1995	--	75	79	86	95	335	--
1996	--	95	80	89	104	368	--
1997	--	107	95	112	122	437	--
1998	--	121	110	132	144	507	--
1999	--	136	133	152	168	589	--
2000	--	167	153	167	181	668	--
2001	--	179	166	184	207	736	--
2002	--	208	184	210	238	841	--
2003	--	228	217	243	273	961	--
2004	--	258	241	273	299	1,072	
2005		279	261	275			
Est. sugar in exported sugar-containing products							
1993	--	59	56	52	62	229	--
1994	--	74	63	63	66	267	--
1995	--	68	74	78	91	311	--
1996	--	97	85	90	103	376	--
1997	--	103	98	102	108	411	--
1998	--	109	91	98	103	401	--
1999	--	106	96	99	109	409	--
2000	--	116	104	107	128	456	--
2001	--	134	115	129	130	508	--
2002	--	130	112	118	125	485	--
2003	--	138	123	130	140	531	--
2004	--	150	137	140	148	575	--
2005		152	139	153			
Est. sugar in USDA sugar-containing product re-export program							
1993	--	26	23	26	57	132	--
1994	--	24	20	39	43	126	--
1995	--	28	18	18	39	103	--
1996	--	21	20	30	32	104	--
1997	--	22	68	22	45	157	--
1998	--	21	24	32	46	123	--
1999	--	44	58	35	32	169	--
2000	--	21	21	22	22	86	--
2001	--	18	21	29	30	98	--
2002	--	40	39	35	42	156	--
2003	--	43	44	49	47	183	--
2004	--	35	28	40	39	142	--
2005		28	24	37			
Est. sugar deliveries for domestic consumption (adj. for trade in sugar-containing products)							
1993	--	2,320	2,092	2,222	2,497	9,131	65.6
1994	--	2,300	2,137	2,304	2,588	9,329	66.2
1995	--	2,295	2,128	2,337	2,584	9,345	65.5
1996	--	2,398	2,206	2,384	2,552	9,540	66.1
1997	--	2,457	2,209	2,432	2,650	9,747	66.8
1998	--	2,476	2,276	2,494	2,655	9,901	67.0
1999	--	2,532	2,303	2,641	2,746	10,222	68.4
2000	--	2,652	2,387	2,566	2,686	10,292	68.1
2001	--	2,626	2,442	2,569	2,688	10,326	67.7
2002	--	2,592	2,338	2,567	2,800	10,297	66.9
2003	--	2,630	2,321	2,521	2,645	10,116	65.1
2004	--	2,647	2,419	2,540	2,711	10,317	65.8
2005	--	2,718	2,470	2,642			

1/ includes Puerto Rico. Source: USDA (deliveries data), ERS (sugar in traded products).

of additional domestic refined beet sugar (128,068 STRV) and refined imported sugar (87,000 STRV), the total is forecast to be reached.

The USDA projects FY 2006 sugar deliveries for food and beverage use at 9.950 million STRV. An ERS delivery simulation model described in the May 2005 issue of the *Sugar and Sweetener Outlook* projects a 95-percent confidence interval projection of FY 2006 deliveries between 9.816 million STRV and 10.125 million STRV. The midpoint of the projected interval is 9.970 million STRV, about 20,000 STRV more than the *WASDE* projection.

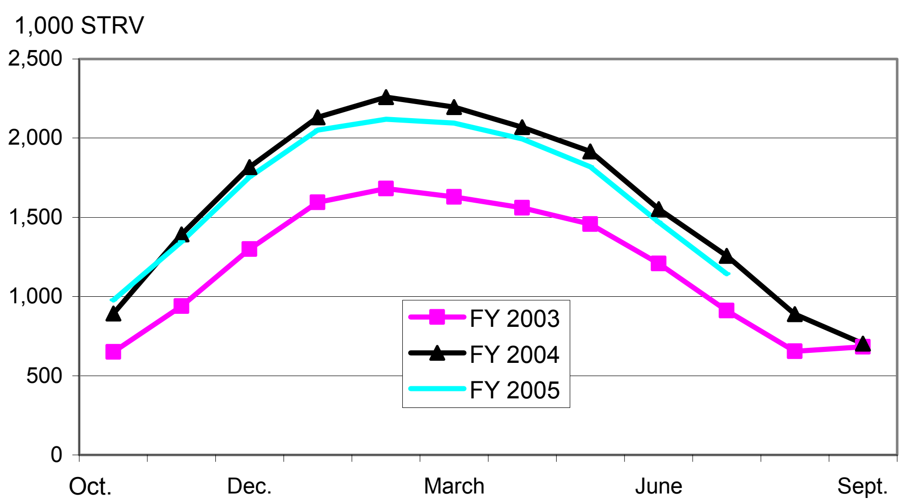
Ending Stocks

Ending stocks are the difference between supply and use. For FY 2005, they are estimated at 1.528 million STRV, implying an ending stocks-to-use ratio of 14.86 percent. Figure 1 shows the course of monthly beet sugar stocks held by processors for FY 2003, FY 2004, and FY 2005. Stocks in FY 2005 are seen midway between corresponding levels in FY 2003 and FY 2004. Figure 2 shows the course of monthly cane sugar stocks held by processors and refiners. In contrast to the beet processors, cane stock holdings in FY 2005 decreased below corresponding months starting in March. The decrease is attributable to reduced cane production in Florida and Louisiana, and stronger delivery demand in FY 2005 compared with FY 2003 and FY 2004.

For FY 2006, ending stocks are projected at 1.014 STRV, implying an ending stocks-to-use ratio of 9.83 percent. The last time the ending stocks-to-use ratio was below this forecast level was in FY1974 when the ratio was 8.83 percent. At that time, the raw sugar price for the fourth quarter of the fiscal year (July-September) was 31.55 cents a pound.

Figure 1

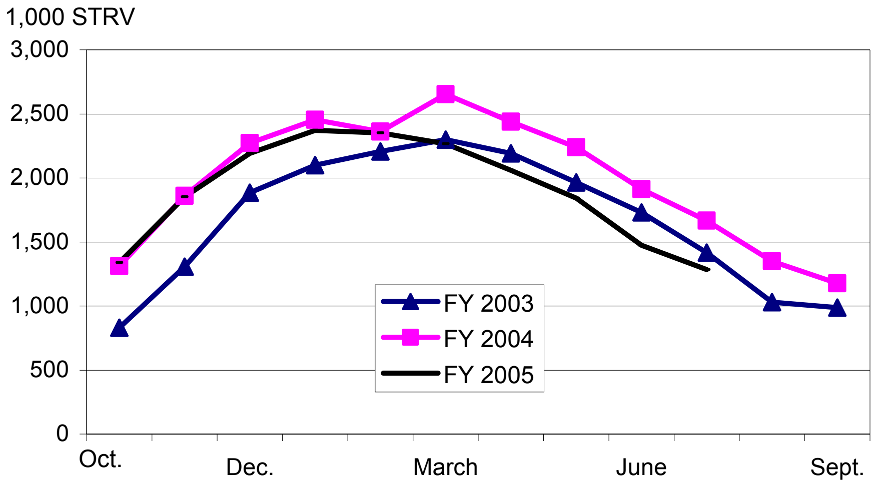
Monthly beet processors' sugar stocks, FY 2003-FY 2005



Source: USDA.

Figure 2

Monthly ending stocks, cane processors and refiners, FY 2003-FY 2005



Source: USDA.

Sectoral Sugar Supply, Utilization, and Ending Stocks for FY 2005 and FY 2006

Table 8 shows an ERS estimate of sectoral sugar supply, utilization, and ending stocks for FY 2005 that corresponds with the September 2005 *WASDE*. Beet sugar supply is the sum of beginning stocks held by processors, production, net CCC purchases, and thick juice imports. Beet processors are assumed to deliver sugar for domestic food and beverage use equal to the sum of: (1) sugar sold in FY 2004 but not delivered in FY 2004 (198,527 STRV); (2) net sugar purchases from the CCC (17,120 STRV); and (3) sugar delivered through July 2005 and implied deliveries for August and September based on information in USDA press releases, less sugar reported under items (1) and (2). Other beet deliveries are for feed use. Beet ending stocks are estimated at 427,992 STRV. Assuming that beet processors market 100 percent of their OAQ allotment, sugar held for others is estimated at 51,288 STRV (i.e., 8,680,000*.5435-4,666,293). Beet sugar stocks owned by processors are estimated at 376,704 STRV. Total stocks held by processors are the lowest since FY 1990.

Cane processors are assumed to ship or deliver all their allocation of OAQ sugar (i.e., their share of the OAQ less reassignments to the CCC and imports), leaving stocks at 16,702 STRV. Cane refiners' stocks are residually calculated to be 1,083,357 STRV. Figure 3 shows fiscal year ending stocks for the beet and combined cane sectors since 1982, with the estimate for FY 2005. Combined cane stocks for FY 2005 are about 11 percent above their average value since 1982.

Table 8--Sectoral sugar supply and utilization for FY 2005

	WASDE	Beet processors	Cane processors	Cane refiners	CCC	Direct	
			short tons, raw value				
Beginning stocks	1,897,329	702,992	362,825	814,392	17,120	0	
Production	7,949,778	4,622,711	3,327,067				
Net CCC transfer	NA	17,120			-17,120		
Cane receipts - domestic	NA			3,657,447			
Imports	1,960,944	20,000		1,851,341		89,604	1/
Supply	11,808,051	5,362,823	3,689,892	6,323,180	0	89,604	2/
Exports	240,000	28,861	2,013	209,126			
Deliveries for food/bev.	9,875,000	4,881,940	12,760	4,890,697		89,604	
Subj. to allotment	NA	4,666,293	12,760				
Not subj. to allot.							
sold in FY 2004	NA	198,527					
CCC purchase	NA	17,120					
Other deliveries	165,000	24,030	970	140,000			
Product re-export	115,000			115,000			
Polyhydric alcohol	25,000			25,000			
Feed use	25,000	24,030	970				
Shipments (cane allot.)	NA		3,657,447				
Shipments less receipts	0						
Other miscellaneous	0						
Total Use	10,280,000	4,934,831	3,673,190	5,239,822		89,604	
Ending stocks	1,528,051	427,992	16,702	1,083,357	0	0	
Owned by processors		376,704					
Held for others		51,288					3/

Source: USDA, ERS. NA = not applicable.

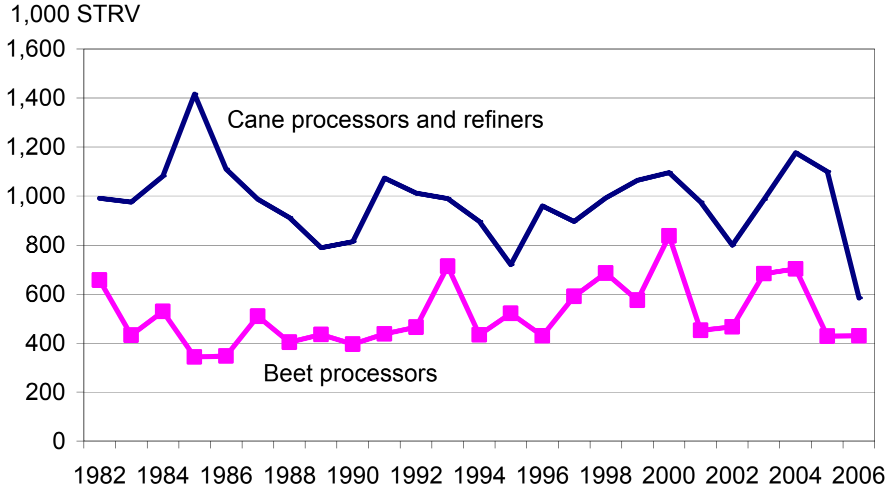
1/ Sum of refined sugar TRQ and high-tier tariff refined imports.

2/ *WASDE* supply excludes cane refiners' receipts from domestic cane processing sector.

3/ Equal to beet processors' undelivered OAQ allotment.

Figure 3

Ending fiscal year sugar stocks, actual 1982-2004, and projected, 2005-2006



Source: USDA (actual), ERS (projected).

Table 9 shows the ERS projection of sectoral sugar supply, utilization, and ending stocks for FY 2006. The beet sector is similar in most respects to that described for table 8 but there are no purchases from the CCC. It is assumed that beet processors hold ending year stocks totaling to 430,000 STRV, which is the lowest amount after FY 1990 (but not counting the slightly lower ERS estimate in table 8). If there are no beet sector OAQ reassignments to imports, beet processors finish the year selling 352,529 STRV for delivery in FY 2007.

Cane processor shipments are equal to total supply (production and beginning stocks). Total supply is less than the OAQ allocation minus the reassignment of 120,000 STRV to imports, leaving projected stocks at zero. Residual cane refiner stocks are projected at 583,869 STRV. As can be seen from figure 3, combined cane stocks are at their lowest point for the period. Because the deliveries estimate presupposes the willingness of cane refiners to deliver, it would seem probable that raw sugar imports will have to be higher than what is currently shown in the September *WASDE*. The increase could result from either an increase in the TRQ or high-tier tariff imports.

Another complication for FY 2006 could result from inadequate refiners' capacity to refine raw sugar from domestic and imported sources. Table 10 shows refining capacity for cane refiners in 2005.[5/] If all facilities were in operation, yearly capacity of 6.919 million STRV would exceed estimated supply of 6.415 million plus possible added raw imports but fewer beginning stocks of already refined sugar. The unknown element is how long the Chalmette refinery will remain out of operation. With capacity of about 90,000 STRV a month, a prolonged absence could cause disruption in refined sugar deliveries, making refined sugar imports more likely.

[5/] Refining capacity is slightly under-estimated due to omission of relatively small refining operations in Ohio and

Table 9--Sectoral sugar supply and utilization for FY 2006

	WASDE	Beet processors	Cane processors	Cane refiners	CCC	Direct	
			short tons, raw value				
Beginning stocks	1,528,051	427,992	16,702	1,083,357	0	0	
Production	7,963,308	4,374,867	3,588,441				
Net CCC transfer	NA	0			0		
Cane receipts - domestic	NA			3,605,143			
Imports	1,837,510	20,000		1,726,497		91,013	1/
Raw TRQ	1,371,497			1,371,497			
Refined TRQ	41,013					41,013	
Other Program	325,000			325,000			
Non-program	100,000	20,000		30,000		50,000	
Supply	11,328,869	4,822,859	3,605,143	6,414,997	0	91,013	2/
Exports	200,000	0	0	200,000			
Deliveries for food/bev.	9,950,000	4,372,859	0	5,486,128		91,013	
Subj. to allotment	NA	4,321,571	0				
Not subj. to allot.							
sold in FY 2005	NA	51,288					
CCC purchase	NA	0					
Other deliveries	165,000	20,000	0	145,000			
Product re-export	125,000			125,000			
Polyhydric alcohol	20,000			20,000			
Feed use	20,000	20,000					
Shipments (cane allot.)	NA		3,605,143				
Shipments less receipts	0						
Other miscellaneous	0						
Total Use	10,315,000	4,392,859	3,605,143	5,831,128		91,013	
Ending stocks	1,013,869	430,000	0	583,869		0	3/
Owned by processors		77,471					
Held for others		352,529					

Source: USDA, ERS. NA = not applicable.

1/ Sum of refined sugar TRQ and high-tier tariff refined imports.

2/ *WASDE* supply excludes cane refiners' receipts from domestic cane processing sector.

3/ Beet processor ending stocks = minimum ending year stocks between FY 1992 and FY 2005.

Table 10--U.S. sugar refining capacity in 2005

Location	Daily capacity 1/	Monthly capacity	Yearly capacity 2/
Baltimore, Md.	3,000	85,000	1,020,000
Chalmette, La.	3,100	87,833	1,054,000
Clewiston, Fl.	2,400	68,000	816,000
Crockett, Ca.	3,400	96,333	1,156,000
Gramercy, La.	2,200	62,333	748,000
Port Wentworth, Ga.	3,150	89,250	1,071,000
South Bay, Fl.	1,100	31,167	374,000
Yonkers, NY.	2,000	56,667	680,000
Total	20,350	576,583	6,919,000

1/ 24 hour melting capacity. 2/ 340 days.

Source: U.S. Cane Sugar Refiners Assoc.

Production

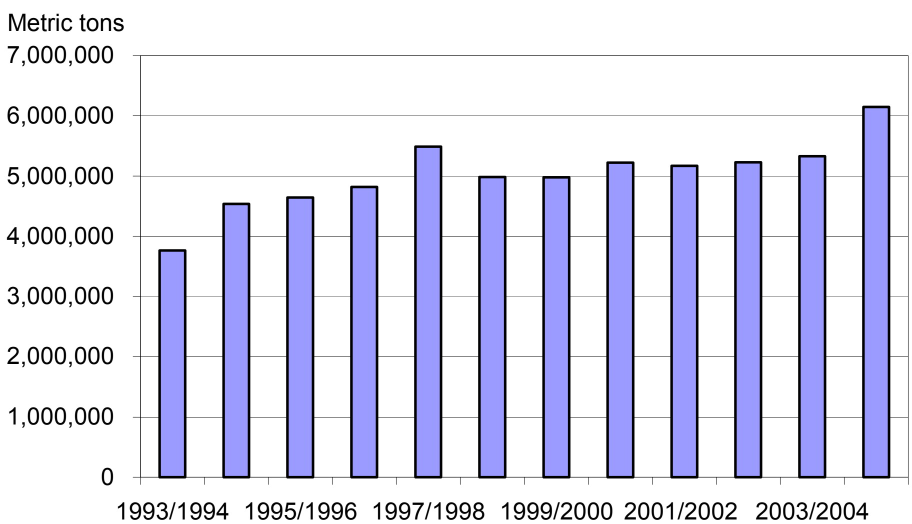
Mexican sugar production continued through July and reached a record 5.796 million metric tons, tel quel, or 6.148 million metric tons, raw value (fig. 4). Sugarcane production is estimated at a record 50.893 million metric tons. The sugar recovery rate is calculated at 11.39 percent, which is slightly higher than the previous record of 11.36 percent set in the 2001/02 harvest. As seen in table 11, sugar production increased in all producing regions except the high-cost Northwest (Sinaloa). Refined sugar production is estimated at 1.943 million tons or over 33 percent of total production, with most of the remainder constituted by estandar (3.852 million tons).

WTO Panel Ruling

Although a report has not yet been published, it has been widely reported that a World Trade Organization (WTO) panel has upheld an initial ruling that favored the United States in its dispute with Mexico over the 20 percent tax placed on beverages that contain high fructose corn syrup (HFCS). When the report is made public, Mexico will have 60 days to decide whether to appeal the ruling. Usually a ruling by the WTO Appellate Body is required within 90 days of the appeal. Some Reports have indicated that Mexico may accept the ruling but substitute for the tax an import tariff of up to 210 percent on imports of HFCS from the United States.

Figure 4

Mexican sugar production, raw value



Source: Coazucar.

Table 11--Mexico: Sugarcane, sugar, and recovery rate, by region and mill ownership

Region	Sector	No. of Mills	2004/05 Cane	2004/05 Sugar	2004/05 Recovery	2003/04 Cane	2003/04 Sugar	2003/04 Recovery	2002/03 Cane	2002/03 Sugar	2002/03 Recovery
			--metric tons, tel quel--		--percent--	--metric tons, tel quel--		--percent--	--metric tons, tel quel--		--percent--
Central	Public	3	3,049,315	374,890	12.29	2,738,838	329,534	12.03	2,444,442	295,958	12.11
	Private	1	180,391	18,971	10.52	287,489	30,822	10.72	261,042	25,828	9.89
	Total	4	3,229,706	393,861	12.19	3,026,327	360,356	11.91	2,705,484	321,786	11.89
Gulf	Public	12	11,719,501	1,301,668	11.11	10,187,500	1,114,597	10.94	9,865,000	1,082,214	10.97
	Private	13	10,572,606	1,207,644	11.42	9,512,878	1,058,384	11.13	8,632,910	970,901	11.25
	Total	25	22,292,107	2,509,312	11.26	19,700,378	2,172,981	11.03	18,497,910	2,053,115	11.10
Northeast	Public	4	4,785,032	542,631	11.34	3,578,602	387,176	10.82	3,719,034	413,901	11.13
	Private	4	4,757,000	527,483	11.09	3,674,860	384,965	10.48	3,681,070	412,137	11.20
	Total	8	9,542,032	1,070,114	11.21	7,253,462	772,141	10.65	7,400,104	826,038	11.16
Northwest	Public	0	0	0		0	0		0	0	
	Private	3	1,257,460	112,623	8.96	1,769,732	163,684	9.25	1,913,564	183,647	9.60
	Total	3	1,257,460	112,623	8.96	1,769,732	163,684	9.25	1,913,564	183,647	9.60
Pacific	Public	3	1,385,640	153,332	11.07	1,270,609	141,935	11.17	1,261,835	139,041	11.02
	Private	9	8,846,489	1,084,176	12.26	8,215,440	972,975	11.84	7,978,739	964,335	12.09
	Total	12	10,232,129	1,237,508	12.09	9,486,049	1,114,910	11.75	9,240,574	1,103,376	11.94
South	Public	1	335,759	35,291	10.51	287,532	31,401	10.92	250,131	28,089	11.23
	Private	5	4,003,450	437,730	10.93	3,891,462	404,256	10.39	3,940,470	411,524	10.44
	Total	6	4,339,209	473,021	10.90	4,178,994	435,657	10.42	4,190,601	439,613	10.49
Mexico	Public	23	21,275,247	2,407,812	11.32	18,063,081	2,004,643	11.10	17,540,442	1,959,203	11.17
	Private	35	29,617,396	3,388,627	11.44	27,351,861	3,015,086	11.02	26,407,795	2,968,372	11.24
	Total	58	50,892,643	5,796,439	11.39	45,414,942	5,019,729	11.05	43,948,237	4,927,575	11.21

Source: Coazucar.

The United States had argued that the tax violates WTO provisions regarding national treatment: a product imported into a WTO member country cannot be subject to an internal tax above the level applied to like domestic products. Although the tax was applied in the use of domestically produced HFCS, it was not applied to cane sugar produced in Mexico. Cane sugar and HFCS are very close substitutes in use in beverages.

Mexico, on the other hand, argued that WTO rules exempt efforts that are necessary to secure compliance of commitments made under the terms of the NAFTA. In this case, Mexico argued that the United States has barred low-duty access to Mexican sugar produced in excess of domestic consumption, contrary to the provisions of the NAFTA.

Sugar Law

The Law on Sustainable Development, or the "Sugar Law," which was passed by the Mexican legislature in June, was accepted by the Executive Branch in August. The law effectively negates the cancellation of the 1993 Sugar Decree that occurred earlier this year. The law re-establishes the role of the Federal Government in the setting of sugar production policy. Specifically, the government will continue to set the sugarcane reference price and to determine the growers' share of sugar sales revenue. Minor changes are to be negotiated in September when the Mexican Congress resumes working.

Maple Syrup

The price of a gallon of maple syrup produced in the United States averaged $28.40 in 2004, only 10 cents higher than in 2003. Prices for syrup tapped in New York and Pennsylvania were up 5 percent, while prices in the Midwest were up 8 percent on average. By contrast, syrup prices in New England fell 4 percent from 2003 largely due to price declines in Maine and Vermont. Nevertheless, only Maine suffered a drop in value of production in 2004, 12 percent down from 2003. Overall, U.S. production value totaled $42.8 million in 2004, up 20 percent from $35.6 million in 2003. New England's production value exceeded $25 million, 10.5 percent more than in 2003.

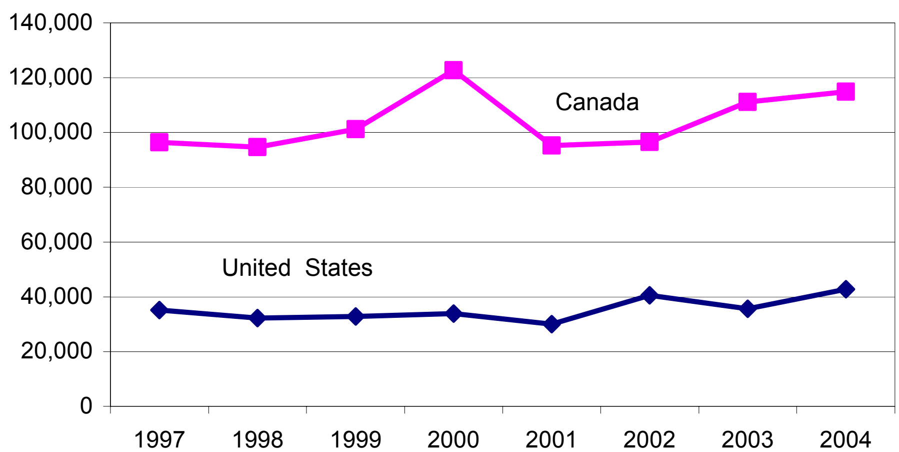
Average U.S. sales per tree tap were up 18 percent in 2004, reflecting the 17-percent yield per tap growth. The average yield per tap reached 0.22 gallon in 2004 as yields increased across all producer States. Only Maine's sales per tap fell, due to the lower price of syrup sold by the State. The average U.S. price of $28.40 in 2004 raised the value of U.S. maple syrup consumption to $120 million, including imports, a 9-percent gain. Syrup consumption per household reached $1.09, up from $1 in 2003.

The average retail price for U.S. maple syrup was $31.84 in 2004, up marginally from 2003. The average wholesale price was $27.07 and the bulk price was $17.05. Syrup sales in 2004 were 47 percent bulk, 39 percent retail, and 14 percent wholesale. Retail sales were up 30 percent in 2004, compared with 15 percent for bulk and 13 percent at wholesale. The syrup price in Canada averaged $16.31 per U.S. gallon in 2004, only 60 percent of the U.S. price. However, the value of Canadian syrup production was $115 million in 2004, about 2.7 times larger than the United States.

Figure 5

Value of maple syrup and products, United States and Canada, 1997-2004

1,000 U.S. dollars



Source: USDA, Statistics Canada.

European Union-25

European Union Policy Developments

On June 22, 2005, the European Commission presented new proposals for the reform of the European Union (EU) sugar regime (table 12).[1/] The proposals called for a 39 percent price cut, as well as offering a quota buyback scheme and some new quota that the more efficient sugar processors can effectively purchase through the Commission. This quota sale, along with a temporary restructuring charge on remaining quota holders, will finance the buyout. Sugarbeet growers will be compensated with direct income payments equal to around 60 percent of the value of the price cut they face.

[1/] See Foreign Agricultural Service Gain Report No. E35143 at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp.

The European Commission wants to get the proposals formally approved (by the European Council) by November to avoid any potential for EU sugar policy to become an issue at the World Trade Organization (WTO) Ministerial meeting in Hong Kong in December. If the legislation is delayed beyond the Commission's November target date, it could mean that processors and growers make production and planting decisions for the 2006/07 marketing year before the eventual outcome of the reform is known. However, many observers think that November may be an over ambitious target. In any case, proposals will need to be agreed by June 2006 at the absolute latest when the current sugar regime runs out.

In the wake of the WTO appellate decision that upheld the earlier WTO panel decision that effectively reduced the quantity of EU sugar exports to 1.254 million metric tons (or € 499 million in value), the EU is in an official process to "declassify" 1.806 million metric tons of "A" and "B" sugar for export as "C" sugar. Such a move would increase EU sugar exports in 2005/06 to over 7 million metric tons before the EU debates the Commission's radical reform proposal for its sugar regime this November. While Australia, Brazil, and Thailand protest the EU's move to increase exports claiming that it violates the WTO ruling against EU exports beyond 1.254 million metric tons, the EU counters that it is within its rights since the WTO has not set a date for EU compliance and will not do so until November of this year. In the run-up to the EU's negotiations on the sugar proposals to be debated this November, member states are consulting with one another to form alliances that will ultimately decide the breadth and depth of the EU's sugar reform scheduled for implementation in July 2006.

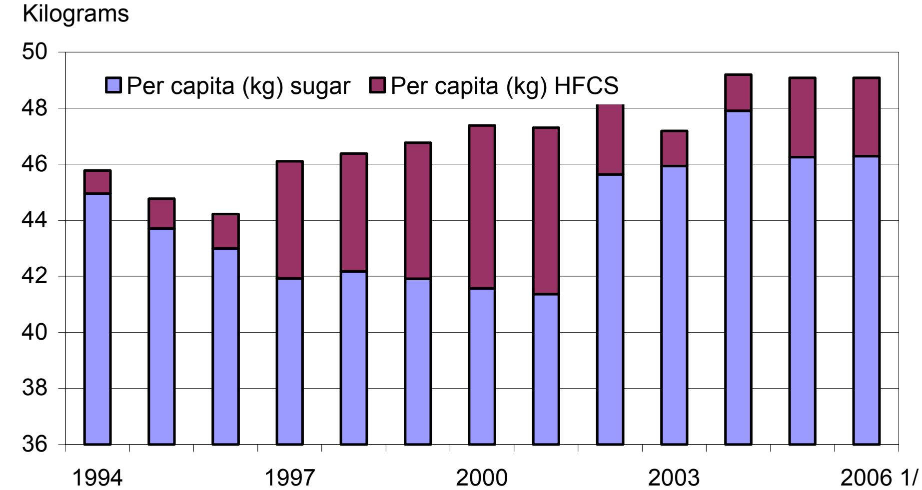
Table 12--Outline of EU Sugar Reform Proposals

- o Prices of sugar and sugarbeet cut around 40 percent in two steps between 2006/07 and 2007/08;
- o Intervention and intervention prices to be abolished, replaced with a 'reference price' to act as a trigger for eligibility for private storage aid.
- o Minimum beet sugar prices cut in two annual steps to €25.05, from €43.63 today. Prices paid to beet growers will be allowed to fluctuate ±10 percent;
- o Beet growers to be compensated for 60 percent of the price cut through direct income payments;
- o The current EU-25 quota of 17.4 MMT of sugar is maintained (no quota cut);
- o The new regime will last for 9 years from 2006/07 to 2014/15;
- o A restructuring fund will be set up to buy back sugar quota. In 2006/07, quota can be sold back to the Commission by sugar processors for €730/MT, this amount falls by €100 to €105/MT/year to the final year of the buy back offer, to €420/MT in 2009/10;
- o Processors keeping their quota will have to pay a restructuring charge to the fund, set at €126.4/MT in 2006/07, €92.3/MT in 2007/08 and €64.5/MT in 2008/09;
- o An additional 1 MMT of new quota will be offered for sale to current C sugar producers for €730/MT, the money will be added to the restructuring fund;
- o No cross border quota transfers allowed (the 2004 reform proposals enabled cross border transfers);
- o In 2010, the Commission can unilaterally reduce quotas to a 'sustainable' level once the restructuring fund has finished in 2009/10;
- o No review of price and quota levels in 2008 (as foreseen in the July 2004 proposals);
- o Sugarbeet grown for ethanol/industrial uses eligible for the €45/hectare carbon credit/set-aside;
- o EU sugar marketing year to be moved from July/June to October/September from 2007/08;
- o A price reporting system to be established;
- o Over quota production can no longer be exported as C sugar, but is to be carried over to the next marketing year, to be used as the first part of the following year's quota. The Commission can additionally order some quota sugar to be withdrawn from the EU-25 market for up to one year. There is also scope to introduce a policy similar to the super levy in the dairy sector, where over quota production leads to steep penalties to producer
- o EBA countries continue to receive unlimited zero duty access to EU-25 sugar markets from 2009/10, with a minimum price for raw sugar of €303/MT;
- o ACP and EBA imports of raw sugar restricted to EU sugar refineries, as in the previous regime. However, from 2010, the sugar processors can also compete with the sugar refiners for raw sugar imports.

Source: FAS.

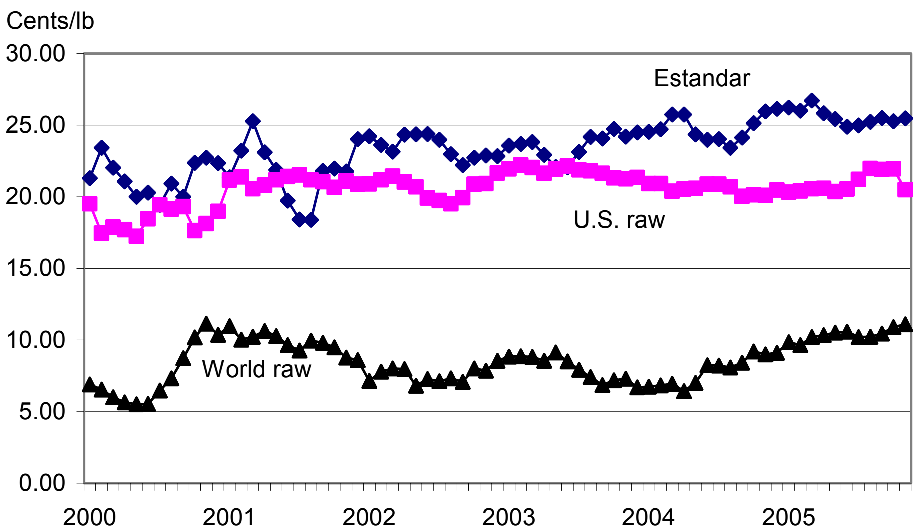
Mexican Sweeteners-At-A-Glance

Per capita sweetener consumption in Mexico, actual and projected, 1994-2006



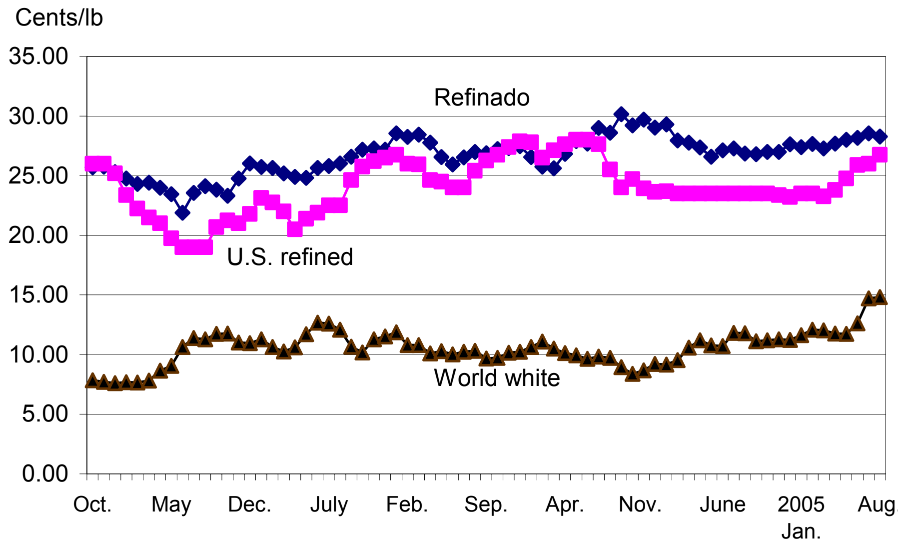
Source: ERS. 1/ Projected.

Sugar prices: Mexican estandar, U.S. raw and world raw



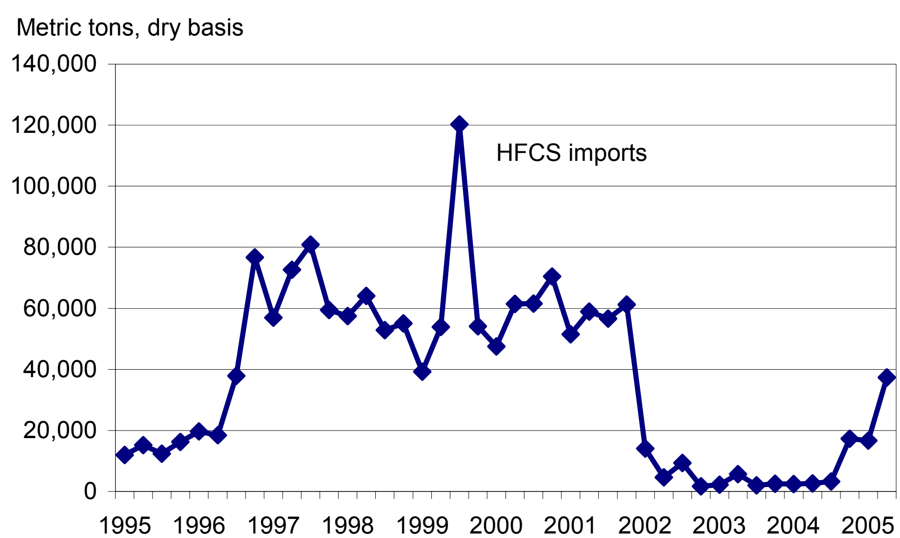
Source: CNIAA, NYBOT.

Sugar prices: Mexican refinado, U.S. refined beet, and world white



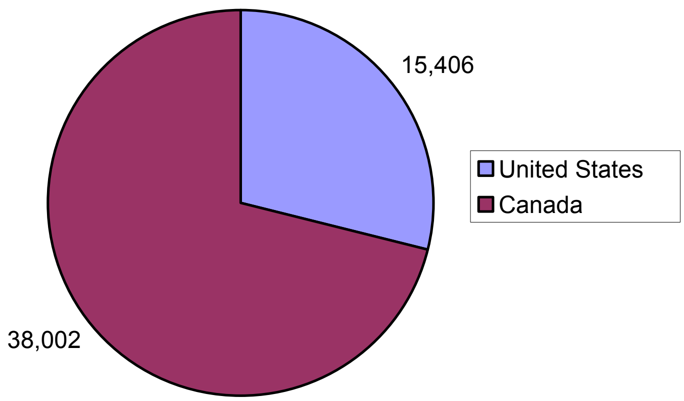
Sources: CNIAA, *Milling and Baking News* , LIFFE.

Mexico: Quarterly HFCS imports, 1995-2005



Source: Secretariat of Economy.

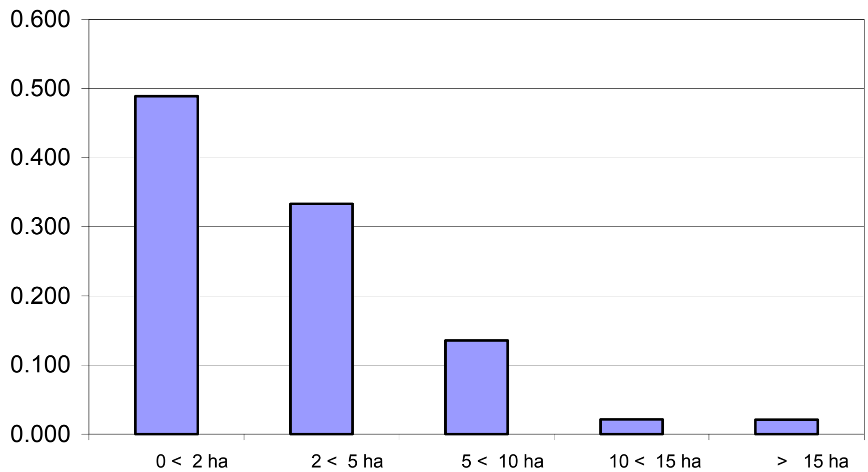
Sourcing of HFCS-55 and above for first three quarters of 2004/05 marketing year, metric tons dry weight



Source: Secretariat of Economy.

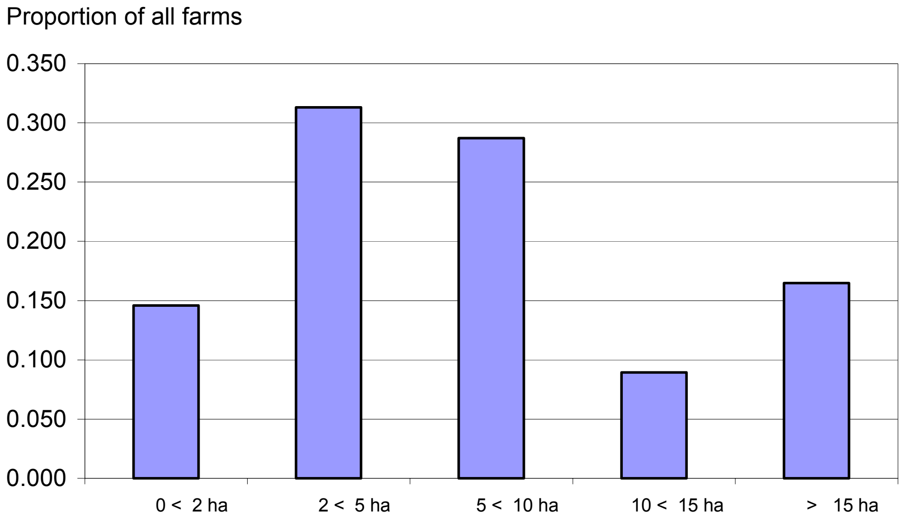
Mexico: Proportion of sugarcane farms by area size, 2003/04

Proportion of all farms



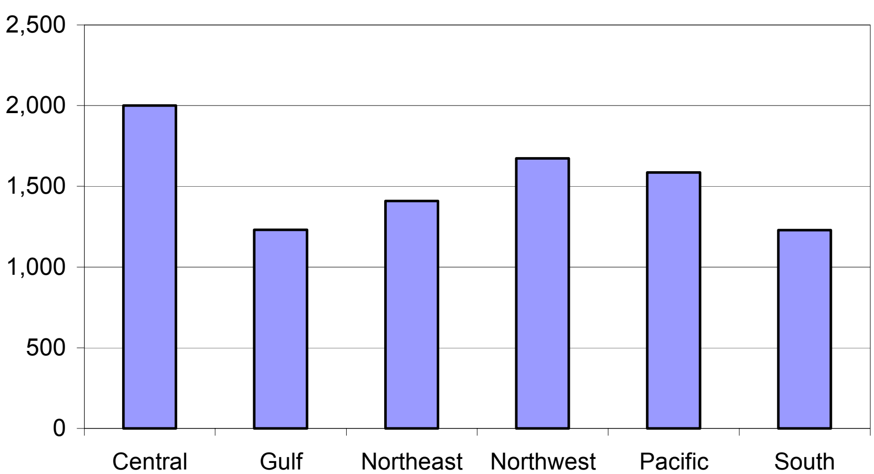
Source: Coazucar.

Mexico: Proportion of sugarcane area by farm area size, 2003/04



Source: Coazucar.

Mexico: Sugarcane production costs, 2003/04, U.S. dollars/hectare



Exchange rate = 11.257 pesos/dollar.
Source: Coazucar

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Data

Tables from the *Sugar and Sweeteners Yearbook* are available in the Sugar and Sweeteners Briefing Room at http://www.ers.usda.gov/briefing/sugar/. They contain the latest data and historical information on the production, use, prices, imports, and exports of sugar and sweeteners.

Related Websites

WASDE http://www.usda.gov/oce/waob/wasde/wasde.htm
Sugar Briefing Room, http://www.ers.usda.gov/briefing/Sugar/

Table 13--World refined sugar price, monthly, quarterly, and by calendar and fiscal year 1/

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	1st Q.	2nd Q.	3rd Q.	4th Q.	Calendar	Fiscal
	Cents per pound																	
1991	13.39	13.40	13.86	12.90	12.99	13.94	14.73	14.40	13.09	13.03	12.71	12.46	13.55	13.28	14.07	12.73	13.41	13.71
1992	12.18	11.92	12.19	12.54	12.89	13.41	13.41	12.96	12.29	11.94	11.68	11.26	12.10	12.95	12.89	11.63	12.39	12.67
1993	11.60	11.97	13.05	13.38	13.39	12.64	12.20	13.05	12.90	13.23	13.15	12.97	12.21	13.14	12.72	13.12	12.79	12.42
1994	13.14	14.11	15.46	14.92	15.77	16.05	15.54	15.62	15.42	15.46	17.77	18.65	14.24	15.58	15.53	17.29	15.66	14.62
1995	18.75	18.17	17.45	16.31	17.05	19.16	20.27	20.01	16.58	17.29	17.64	17.21	18.12	17.51	18.95	17.38	17.99	17.97
1996	17.36	17.90	18.14	18.02	17.79	18.00	16.99	16.81	15.74	14.87	14.09	13.95	17.80	17.94	16.51	14.30	16.64	17.41
1997	13.87	13.98	14.05	14.19	14.61	14.93	15.07	15.66	14.51	13.58	13.81	13.64	13.97	14.58	15.08	13.68	14.33	14.48
1998	13.52	12.78	12.23	11.63	12.00	11.80	11.65	11.62	10.05	10.00	10.78	10.97	12.84	11.81	11.11	10.58	11.59	12.36
1999	10.99	10.50	9.85	8.79	9.13	9.93	9.47	9.04	8.28	7.85	7.73	7.61	10.45	9.28	8.93	7.73	9.10	9.81
2000	7.70	7.67	7.83	8.66	9.06	10.63	11.38	11.29	11.74	11.76	11.02	10.95	7.73	9.45	11.47	11.24	9.97	9.10
2001	11.27	10.65	10.26	10.61	11.71	12.68	12.60	12.08	10.66	10.19	11.27	11.52	10.73	11.67	11.78	10.99	11.29	11.35
2002	11.88	10.80	10.81	10.09	10.28	10.02	10.23	10.33	9.68	9.72	10.16	10.25	11.16	10.13	10.08	10.04	10.35	10.59
2003	10.64	11.10	10.51	10.14	9.95	9.66	9.84	9.74	8.95	8.39	8.67	9.23	10.75	9.92	9.51	8.76	9.74	10.06
2004	9.16	9.54	10.59	11.19	10.78	10.73	11.81	11.80	11.12	11.21	11.27	11.23	9.76	10.90	11.58	11.24	10.87	10.25
2005	11.63	12.09	12.02	11.76	11.75	12.61	14.70	14.81					11.91	12.04				

1/ Contract No. 5, London Daily Price, for refined sugar, f.o.b. Europe, spot.

Source: LIFFE, London.

Table 14--World raw sugar price, monthly, quarterly, and by calendar and fiscal year 1/

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	1st Q.	2nd Q.	3rd Q.	4th Q.	Calendar	Fiscal
	Cents per pound																	
1991	8.88	8.57	9.22	8.55	7.88	9.37	10.26	9.45	9.39	9.10	8.79	9.03	8.89	8.60	9.70	8.97	9.04	9.26
1992	8.43	8.06	8.22	9.53	9.62	10.52	10.30	9.78	9.28	8.66	8.54	8.15	8.24	9.89	9.79	8.45	9.09	9.22
1993	8.27	8.61	10.75	11.30	11.87	10.35	9.60	9.30	9.52	10.27	10.10	10.47	9.21	11.17	9.47	10.28	10.03	9.58
1994	10.29	10.80	11.71	11.10	11.79	12.04	11.73	12.05	12.62	12.75	13.88	14.76	10.93	11.64	12.13	13.80	12.13	11.25
1995	14.87	14.43	14.58	13.63	13.49	13.99	13.46	13.75	12.72	11.94	11.96	12.40	14.63	13.70	13.31	12.10	13.44	13.86
1996	12.57	12.97	13.07	12.43	11.94	12.54	12.83	12.33	11.87	11.65	11.29	11.38	12.87	12.30	12.34	11.44	12.24	12.40
1997	11.13	11.06	11.17	11.50	11.54	12.02	12.13	12.54	12.65	12.86	13.19	12.90	11.12	11.69	12.44	12.98	12.06	11.67
1998	11.71	11.06	10.66	10.27	10.17	9.33	9.70	9.50	8.21	8.24	8.73	8.59	11.14	9.92	9.14	8.52	9.68	10.80
1999	8.40	7.05	6.11	5.44	5.83	6.67	6.11	6.39	6.98	6.90	6.54	6.00	7.19	5.98	6.49	6.48	6.54	7.05
2000	5.64	5.51	5.54	6.48	7.33	8.72	10.18	11.14	10.35	10.96	10.02	10.23	5.56	7.51	10.56	10.40	8.51	7.53
2001	10.63	10.26	9.64	9.27	9.96	9.80	9.48	8.77	8.60	7.15	7.80	8.02	10.18	9.68	8.95	7.66	9.12	9.80
2002	7.96	6.81	7.27	7.12	7.33	7.07	8.02	7.86	8.54	8.84	8.87	8.81	7.35	7.17	8.14	8.84	7.88	7.58
2003	8.56	9.14	8.50	7.92	7.41	6.85	7.18	7.30	6.70	6.74	6.83	6.95	8.73	7.39	7.06	6.84	7.51	8.01
2004	6.42	7.01	8.23	8.21	8.08	8.41	9.19	8.99	9.10	9.84	9.65	10.19	7.22	8.23	9.09	9.89	8.61	7.85
2005	10.33	10.51	10.57	10.19	10.23	10.45	10.89	11.09					10.47	10.29				

1/ Contract No. 11-f.o.b. stowed Caribbean port, including Brazil, bulk spot price.

Source: Coffee, Sugar & Cocoa Exchange, Inc.

Table 15--U.S. raw sugar price, duty fee paid, New York, monthly, quarterly, and by calendar and fiscal year 1/

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	1st Q.	2nd Q.	3rd Q.	4th Q.	Calendar	Fiscal
								Cents per pound										
1991	21.86	21.42	21.46	21.23	21.29	21.42	21.25	21.83	22.06	21.76	21.75	21.50	21.58	21.31	21.71	21.67	21.57	21.89
1992	21.38	21.56	21.36	21.38	21.04	20.92	21.10	21.34	21.55	21.61	21.39	21.11	21.43	21.11	21.33	21.37	21.31	21.39
1993	20.76	21.16	21.56	21.76	21.36	21.42	21.89	21.85	21.97	21.80	21.87	22.00	21.16	21.51	21.90	21.89	21.62	21.49
1994	22.00	21.95	21.95	22.08	22.18	22.44	22.72	21.84	21.78	21.58	21.57	22.35	21.97	22.23	22.11	21.83	22.04	22.05
1995	22.65	22.69	22.46	22.76	23.10	23.09	24.47	23.18	23.21	22.67	22.60	22.63	22.60	22.98	23.62	22.63	22.96	22.76
1996	22.39	22.68	22.57	22.71	22.62	22.48	21.80	22.51	22.38	22.37	22.12	22.14	22.55	22.60	22.23	22.21	22.40	22.50
1997	21.88	22.07	21.81	21.79	21.70	21.62	22.04	22.21	22.30	22.27	21.90	21.93	21.92	21.70	22.18	22.03	21.96	22.00
1998	21.85	21.79	21.74	22.14	22.31	22.42	22.66	22.19	21.92	21.67	21.83	22.19	21.79	22.29	22.26	21.90	22.06	22.09
1999	22.41	22.38	22.55	22.57	22.65	22.61	22.61	21.24	20.10	19.50	17.45	17.87	22.45	22.61	21.32	18.27	21.16	22.07
2000	17.70	17.24	18.46	19.43	19.12	19.31	17.64	18.12	18.97	21.15	21.39	20.56	17.80	19.29	18.24	21.03	19.09	18.40
2001	20.81	21.18	21.40	21.51	21.19	21.04	20.64	21.10	20.87	20.90	21.19	21.43	21.13	21.25	20.87	21.17	21.11	21.07
2002	21.03	20.69	19.92	19.73	19.52	19.93	20.86	20.91	21.65	21.94	22.22	22.03	20.55	19.73	21.14	22.06	20.87	20.65
2003	21.62	21.91	22.14	21.87	21.80	21.62	21.32	21.26	21.34	20.92	20.91	20.37	21.89	21.76	21.31	20.73	21.42	21.76
2004	20.54	20.57	20.86	20.88	20.69	20.03	20.14	20.10	20.47	20.31	20.40	20.55	20.66	20.53	20.24	20.42	20.46	20.54
2005	20.57	20.36	20.54	21.21	21.96	21.89	21.94	20.49					20.49	21.69				

1/ Contract No. 14, duty fee paid New York. Average of nearest futures month for which an entire month of prices will be available. For example, April 2001's price average of 21.51 cents is the average of closes for the July 2001 futures during the month of April since there was not a full month of May 2001 futures in April (the May 2001 futures expired April 10th, July 2001 became the nearest futures, so July 2001 was used for the entire month of April).
Source: New York Board of Trade (www.nybot.com).

Table 16--U.S. wholesale refined beet sugar price, Midwest markets, monthly, quarterly, and by calendar and fiscal year

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	1st Q.	2nd Q.	3rd Q.	4th Q.	Calendar	Fiscal
								Cents per pound										
1991	26.88	26.50	26.50	26.13	26.00	25.75	25.50	25.50	25.00	24.94	24.60	24.50	26.63	25.96	25.33	24.68	25.65	26.57
1992	25.40	26.50	26.50	26.50	26.40	26.00	25.00	25.00	25.00	24.90	24.13	23.90	26.13	26.30	25.00	24.31	25.44	25.53
1993	23.25	23.00	23.00	23.50	23.50	23.50	25.50	27.75	27.50	27.50	27.25	26.50	23.08	23.50	26.92	27.08	25.15	24.45
1994	25.75	25.50	25.50	24.50	24.75	25.25	25.00	25.00	24.70	25.00	25.38	25.50	25.58	24.83	24.90	25.29	25.15	25.60
1995	25.50	25.50	25.50	25.50	25.13	25.10	24.75	24.75	25.50	25.75	28.13	28.85	25.50	25.24	25.00	27.58	25.83	25.26
1996	28.69	29.00	29.50	29.50	29.70	29.50	29.50	29.00	29.00	29.00	29.00	29.00	29.06	29.57	29.17	29.00	29.20	28.84
1997	29.00	29.00	28.13	28.00	28.00	27.50	27.00	26.65	26.38	24.90	25.00	25.50	28.71	27.83	26.68	25.13	27.09	28.06
1998	25.50	25.50	25.50	25.50	26.00	26.00	26.00	26.00	26.50	26.90	27.00	27.00	25.50	25.83	26.17	26.97	26.12	25.66
1999	27.20	27.13	27.00	27.00	27.00	27.00	27.00	27.00	27.00	26.00	26.00	25.20	27.11	27.00	27.00	25.73	26.71	27.02
2000	23.38	22.25	21.50	21.00	19.75	19.00	19.00	19.00	20.70	21.25	21.00	21.80	22.38	19.92	19.57	21.35	20.80	21.90
2001	23.13	22.75	22.00	20.50	21.38	21.90	22.50	22.50	24.63	25.75	26.20	26.50	22.63	21.26	23.21	26.15	23.31	22.11
2002	26.75	26.00	25.95	24.63	24.50	24.00	24.00	25.40	26.25	26.75	27.40	27.88	26.23	24.38	25.22	27.34	25.79	25.49
2003	27.80	26.50	27.13	27.63	28.00	28.00	27.63	25.50	24.00	24.70	23.94	23.63	27.14	27.88	25.71	24.09	26.21	27.02
2004	23.70	23.50	23.50	23.50	23.50	23.50	23.50	23.50	23.50	23.50	23.38	23.20	23.57	23.50	23.50	23.36	23.48	23.66
2005	23.50	23.50	23.25	23.80	24.75	25.88	26.00	26.75					23.42	24.81				

Source: *Milling & Baking News*. Simple average of the lower end of the range of quotations for days in that month. Quotations are weekly.

Table 17--U.S. retail refined sugar price, monthly, quarterly, and by calendar and fiscal year

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.		1st Q.	2nd Q.	3rd Q.	4th Q.		Calendar	Fiscal
									Cents per pound											
1991	43.40	43.00	43.40	43.30	43.10	43.20	43.50	42.80	42.20	42.00	41.90	41.80	:	43.27	43.20	42.83	41.90	:	42.80	43.08
1992	42.50	42.40	41.90	41.70	41.70	41.50	41.50	41.10	41.00	41.20	41.20	40.60	:	42.27	41.63	41.20	41.00	:	41.53	41.75
1993	41.20	41.00	40.60	40.80	40.80	40.30	40.20	40.60	40.40	40.50	40.30	39.80	:	40.93	40.63	40.40	40.20	:	40.54	40.74
1994	40.70	40.50	40.10	39.90	40.10	39.70	40.00	39.70	40.30	40.20	39.50	39.20	:	40.43	39.90	40.00	39.63	:	39.99	40.13
1995	39.70	39.90	39.80	39.40	39.70	39.50	39.70	39.60	39.80	40.40	40.70	39.80	:	39.80	39.53	39.70	40.30	:	39.83	39.67
1996	40.50	40.30	40.60	40.40	41.50	41.80	42.40	42.80	42.60	43.20	42.60	42.80	:	40.47	41.23	42.60	42.87	:	41.79	41.15
1997	43.40	42.90	43.10	43.50	43.40	43.60	43.30	43.60	43.60	43.00	42.90	42.80	:	43.13	43.50	43.50	42.90	:	43.26	43.25
1998	43.00	42.90	43.30	43.10	42.80	43.10	43.20	43.60	43.20	42.30	42.50	42.70	:	43.07	43.00	43.33	42.50	:	42.98	43.08
1999	43.60	43.00	43.70	43.20	43.60	43.10	43.20	43.10	43.70	43.80	42.60	42.60	:	43.43	43.30	43.33	43.00	:	43.27	43.14
2000	43.70	43.20	42.90	41.40	42.40	42.80	42.50	42.40	42.40	42.50	41.30	41.40	:	43.27	42.20	42.43	41.73	:	42.41	42.73
2001	42.80	43.50	43.70	42.90	43.80	43.50	44.30	43.30	44.20	44.00	42.50	42.50	:	43.33	43.40	43.93	43.00	:	43.42	43.10
2002	44.10	43.70	42.60	44.40	42.70	43.00	43.30	43.30	43.70	42.40	41.90	42.10		43.47	43.37	43.43	42.13	:	43.10	43.32
2003	43.00	42.70	42.70	42.70	43.10	42.90	43.10	43.50	42.60	42.50	41.10	42.20		42.80	42.90	43.07	41.93		42.68	42.73
2004	42.90	42.60	42.60	42.70	42.50	42.50	42.90	42.60	42.60	42.60	42.20	43.00		42.70	42.57	42.70	42.60		42.64	42.48
2005	43.70	43.50	43.30	43.60	42.70	42.80	42.40	43.20						43.50	43.03					

Source: Bureau of Labor Statistics.

Table 18--Bulk sugar prices in Mexico, estandar sugar

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Calendar	Fiscal
	Nominal pesos per 50 kg													
1994	90.85	90.85	90.85	90.85	90.85	90.85	90.85	90.85	90.85	90.85	90.94	91.70	90.93	88.62
1995	91.70	99.33	105.95	106.34	110.92	117.25	117.25	119.80	133.76	140.30	144.91	149.57	119.76	106.32
1996	148.43	152.71	159.88	160.92	162.21	166.86	168.24	171.81	176.29	172.51	160.87	155.08	162.98	158.51
1997	173.20	196.96	187.29	179.11	172.99	179.36	175.96	173.60	176.78	169.63	162.55	162.99	175.87	175.31
1998	178.10	176.01	155.70	163.12	180.02	189.52	186.70	210.43	214.81	215.07	223.54	227.44	193.37	179.13
1999	222.59	214.45	195.14	184.23	184.54	223.55	220.27	207.16	211.56	224.71	242.96	228.98	213.35	210.80
2000	220.61	207.89	207.75	201.33	219.23	216.75	232.14	232.22	230.60	224.57	243.21	263.77	225.01	222.10
2001	248.89	234.25	208.67	189.46	185.45	218.39	222.00	219.07	249.51	249.34	240.23	233.55	224.90	225.60
2002	245.76	244.46	243.44	242.14	240.83	239.15	244.95	248.15	253.40	262.31	266.23	268.39	249.93	243.78
2003	268.50	266.46	265.01	270.04	273.14	278.50	285.05	287.64	294.90	302.40	303.75	319.10	284.54	273.85
2004	309.70	296.25	291.25	298.25	297.25	302.95	317.85	326.20	331.00	329.60	326.05	329.85	313.02	308.00
2005	320.70	312.00	306.00	306.00	305.25	304.10	297.25	300.00						
	Real 2000 pesos per 50 kg													
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Calendar	Fiscal
1994	291.09	290.35	289.24	287.68	286.14	284.35	282.58	280.92	279.11	277.91	276.82	276.20	283.53	280.77
1995	260.81	270.52	273.49	251.99	252.37	259.17	254.39	255.71	280.13	287.73	288.90	287.20	268.53	265.79
1996	275.99	277.40	283.88	277.74	275.96	280.77	279.65	282.07	286.42	276.86	253.98	238.66	274.11	281.98
1997	260.65	292.10	275.10	261.28	250.64	257.85	251.08	245.75	247.90	236.06	222.49	220.70	251.80	259.32
1998	235.08	228.17	199.79	208.01	228.51	237.82	232.07	258.32	256.06	251.28	257.56	257.90	237.55	230.26
1999	246.64	235.89	213.78	201.54	201.29	242.12	237.54	222.51	225.78	237.91	255.51	238.94	229.96	232.82
2000	227.62	212.96	211.64	203.45	220.66	216.19	231.47	230.72	228.57	220.84	237.72	256.34	224.85	226.30
2001	239.04	224.96	198.79	180.34	176.92	208.53	212.44	208.82	236.28	235.45	226.80	221.21	214.13	216.75
2002	232.16	230.78	226.27	222.92	219.68	216.46	220.50	222.04	224.84	232.90	234.77	233.63	226.41	224.92
2003	230.61	225.60	223.77	230.67	234.29	236.88	241.79	242.88	247.86	251.43	250.47	260.23	239.71	234.64
2004	251.54	236.92	229.38	231.45	229.22	233.43	243.92	248.38	250.64	247.88	244.67	249.04	241.37	243.09
2005	241.29	233.10	227.17	226.06	226.80	229.20	222.81							
	U.S. cents per pound													
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Calendar	Fiscal
1994	26.52	26.40	24.96	24.61	24.85	24.48	24.22	24.37	24.23	24.09	23.96	20.93	24.47	24.66
1995	14.75	15.87	14.18	15.49	16.84	17.07	17.37	17.44	19.21	18.87	17.09	17.65	16.82	18.10
1996	18.00	18.43	19.16	19.54	19.79	20.01	20.04	20.74	21.20	20.23	18.45	17.86	19.45	19.21
1997	20.07	22.90	21.36	20.56	19.86	20.47	20.29	20.24	20.61	19.55	17.83	18.19	20.16	20.24
1998	19.64	18.78	16.49	17.41	19.02	19.27	19.03	20.37	19.07	19.20	20.34	20.83	19.12	18.72
1999	19.94	19.44	18.19	17.72	17.82	21.31	21.33	20.00	20.55	21.29	23.41	22.04	20.25	19.72
2000	21.08	20.01	20.29	19.44	20.92	20.00	22.36	22.72	22.35	21.36	23.21	25.28	21.58	21.32
2001	23.11	21.88	19.72	18.43	18.39	21.80	21.97	21.76	24.02	24.22	23.62	23.14	21.84	21.74
2002	24.33	24.36	24.37	23.97	22.97	22.21	22.72	22.88	22.83	23.58	23.69	23.81	23.48	23.47
2003	22.93	22.09	22.05	23.14	24.17	24.06	24.73	24.20	24.49	24.54	24.72	25.73	23.90	23.58
2004	25.73	24.36	23.98	24.01	23.41	24.12	25.14	25.97	26.14	26.22	26.01	26.72	25.15	24.82
2005	25.83	25.41	24.89	24.98	25.23	25.50	25.27	25.47						

Source: Servicio Nacional de Informacion de Mercados SNIIM-ECONOMICA.

Table 19--Bulk sugar prices in Mexico, refinado sugar

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Calendar	Fiscal
Nominal pesos per 50 kg														
1994	101.83	101.83	101.83	101.83	101.83	101.83	101.83	101.83	101.83	101.83	101.85	102.00	101.85	99.31
1995	102.00	110.46	117.80	118.19	122.85	129.30	129.30	132.15	154.33	154.75	159.84	164.98	132.99	118.50
1996	161.26	167.01	177.07	179.04	178.82	181.29	183.36	186.30	188.39	187.66	186.40	186.42	180.25	173.51
1997	194.96	216.67	216.01	215.62	211.40	211.37	213.08	211.71	210.68	206.09	206.63	204.38	209.88	205.17
1998	209.08	207.25	202.34	198.37	205.43	209.93	212.25	229.75	229.88	244.41	250.01	246.63	220.44	210.12
1999	250.22	251.28	241.93	239.00	233.35	242.83	251.83	243.62	239.71	271.33	267.38	263.02	249.63	244.57
2000	259.02	252.50	250.11	248.45	245.58	237.48	244.47	246.61	245.91	245.09	259.57	271.48	250.52	252.66
2001	276.98	274.56	266.54	256.03	250.26	256.90	260.85	261.87	276.33	279.72	277.48	274.21	267.64	263.04
2002	288.40	283.56	284.03	280.56	278.54	279.34	285.98	292.64	298.51	303.09	306.90	309.50	290.92	283.58
2003	310.81	310.73	308.13	313.20	315.26	320.36	334.24	339.84	363.00	360.00	365.00	360.00	333.38	319.59
2004	352.50	340.00	337.20	340.00	337.50	340.60	345.00	337.40	339.50	339.25	338.20	341.00	340.68	346.23
2005	340.00	339.50	335.60	339.00	338.80	335.75	335.75	333.00						
Real 2000 pesos per 50 kg														
1994	326.27	325.44	324.20	322.45	320.72	318.72	316.73	314.87	312.84	311.50	310.04	307.23	317.58	314.64
1995	290.10	300.83	304.08	280.07	279.52	285.81	280.54	282.07	323.19	317.36	318.65	316.78	298.25	296.25
1996	299.85	303.38	314.40	309.01	304.22	305.05	304.79	305.86	306.08	301.17	294.28	286.89	302.91	308.79
1997	293.39	321.33	317.29	314.54	306.29	303.87	304.05	299.70	295.44	286.79	282.82	276.75	300.19	303.19
1998	275.98	268.67	259.64	252.96	260.76	263.43	263.83	282.04	274.03	285.56	288.06	279.66	271.22	270.64
1999	277.25	276.41	265.04	261.46	254.53	263.00	271.57	261.68	255.83	287.27	281.19	274.47	269.14	270.00
2000	267.25	258.66	254.80	251.06	247.19	236.86	243.76	245.02	243.74	241.02	253.71	263.83	250.57	257.61
2001	266.02	263.67	253.92	243.70	238.75	245.30	249.62	249.61	261.68	264.14	261.97	259.72	254.84	252.57
2002	272.44	267.69	263.99	258.29	254.07	252.84	257.43	261.85	264.87	269.10	270.63	269.41	263.55	261.61
2003	266.95	263.09	260.18	267.53	270.42	272.48	283.52	286.95	305.09	299.33	300.98	293.59	280.84	273.78
2004	286.31	271.91	265.57	263.85	260.26	262.44	264.75	256.91	257.08	255.13	253.79	257.46		273.58
2005	255.81	253.64	249.15	250.44	251.73	253.05	251.67							
U.S. cents per pound														
1994	29.73	29.59	27.97	27.58	27.85	27.44	27.15	27.32	27.15	27.00	26.84	23.28	27.41	27.64
1995	16.41	17.65	15.77	17.21	18.66	18.82	19.16	19.23	22.16	20.81	18.85	19.47	18.68	20.18
1996	19.56	20.15	21.23	21.75	21.81	21.74	21.84	22.49	22.65	22.01	21.37	21.47	21.51	21.03
1997	22.59	25.19	24.63	24.76	24.26	24.12	24.57	24.68	24.56	23.75	22.66	22.81	24.05	23.69
1998	23.05	22.11	21.42	21.17	21.71	21.35	21.64	22.24	20.41	21.82	22.75	22.58	21.86	22.03
1999	22.41	22.78	22.55	22.99	22.53	23.15	24.38	23.52	23.28	25.71	25.76	25.31	23.70	22.90
2000	24.75	24.30	24.43	23.99	23.44	21.91	23.55	24.13	23.83	23.31	24.77	26.02	24.03	24.26
2001	25.72	25.65	25.19	24.90	24.82	25.64	25.81	26.01	26.60	27.17	27.29	27.17	26.00	25.37
2002	28.55	28.25	28.43	27.77	26.57	25.95	26.53	26.98	26.89	27.24	27.31	27.46	27.33	27.30
2003	26.55	25.76	25.63	26.83	27.89	27.67	28.99	28.59	30.15	29.21	29.70	29.03	28.00	27.51
2004	29.28	27.96	27.76	27.37	26.58	27.12	27.29	26.86	26.81	26.99	26.98	27.62	27.39	27.91
2005	27.39	27.65	27.29	27.68	28.00	28.15	28.54	28.27						

Source: Servicio Nacional de Informacion de Mercados SNIIM-ECONOMICA.

Table 20--U.S. cane and beet sugar deliveries, monthly, quarterly, and by fiscal and calendar year

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	1st Q.	2nd Q.	3rd Q.	4th Q.	Fiscal	Calendar
								1,000 short tons, raw value										
U.S. beet sugar for domestic consumption:																		
1992	301	284	315	312	283	341	344	356	375	343	357	355	901	935	1,075	1,055	3,902	3,966
1993	303	287	397	299	328	367	358	372	367	346	325	338	988	994	1,097	1,008	4,134	4,087
1994	312	313	370	303	338	406	360	406	437	338	304	282	995	1,047	1,204	924	4,254	4,170
1995	301	311	378	311	356	399	384	450	465	404	395	331	989	1,066	1,300	1,131	4,279	4,486
1996	316	342	361	343	338	325	350	335	300	333	315	267	1,018	1,006	984	915	4,139	3,923
1997	280	272	315	312	326	332	351	373	428	375	316	317	867	970	1,152	1,009	3,903	3,997
1998	324	316	362	344	342	401	393	388	409	392	334	308	1,002	1,087	1,190	1,034	4,288	4,313
1999	319	325	374	346	361	417	400	427	416	438	392	321	1,018	1,124	1,244	1,151	4,419	4,536
2000	320	340	385	341	393	384	348	411	392	412	378	329	1,045	1,118	1,152	1,119	4,465	4,433
2001	366	346	401	375	405	403	414	450	408	429	373	311	1,113	1,183	1,272	1,112	4,686	4,680
2002	349	315	347	340	375	332	369	365	380	423	396	300	1,012	1,047	1,114	1,119	4,285	4,291
2003	315	307	341	338	338	365	380	366	388	395	335	353	962	1,041	1,134	1,082	4,255	4,219
2004	359	367	407	387	333	438	408	433	392	424	378	342	1,133	1,159	1,233	1,145	4,607	4,670
2005	345	368	396	389	374	417	386						1,108	1,180				
Cane sugar for domestic consumption:																		
1992	324	339	406	406	375	455	417	419	468	479	371	349	1,069	1,236	1,303	1,200	4,820	4,808
1993	311	339	391	387	351	423	422	441	469	427	424	395	1,042	1,161	1,332	1,246	4,734	4,781
1994	332	358	422	361	400	448	411	427	473	443	434	420	1,112	1,209	1,310	1,298	4,877	4,929
1995	340	332	432	380	424	438	369	444	423	431	413	381	1,104	1,243	1,236	1,226	4,880	4,808
1996	353	376	443	425	452	471	463	488	565	547	500	456	1,172	1,349	1,515	1,504	5,262	5,539
1997	397	396	481	444	474	509	462	476	500	525	459	431	1,274	1,427	1,437	1,416	5,641	5,553
1998	369	391	470	430	429	481	432	438	506	486	467	451	1,230	1,339	1,377	1,404	5,361	5,349
1999	355	379	453	452	500	476	433	490	485	483	481	433	1,186	1,429	1,407	1,396	5,427	5,419
2000	383	404	484	425	452	488	455	530	471	534	481	398	1,272	1,365	1,456	1,414	5,490	5,508
2001	410	371	470	413	431	458	419	446	417	487	467	384	1,251	1,302	1,282	1,338	5,248	5,172
2002	392	378	437	424	458	490	472	486	549	468	444	407	1,208	1,373	1,507	1,320	5,424	5,407
2003	372	377	467	434	408	475	421	488	415	476	486	413	1,216	1,317	1,324	1,375	5,177	5,232
2004	346	393	406	377	415	408	404	448	415	527	469	383	1,144	1,200	1,268	1,380	4,987	4,992
2005	377	363	459	401	437	441	425						1,198	1,278				
Importers direct consumption:																		
1992	6	6	3	3	2	2	2	7	3	6	7	6	15	7	12	19	49	52
1993	4	2	3	2	5	9	1	2	1	9	6	8	10	17	3	23	48	52
1994	5	3	6	1	4	4	5	5	7	10	15	12	14	9	18	38	63	78
1995	9	1	1	2	0	0	1	1	4	17	5	0	12	3	6	22	59	44
1996	0	0	0	0	0	0	0	1	19	10	1	1	1	1	20	12	44	33
1997	1	0	1	2	1	1	1	0	1	15	2	2	2	4	2	19	20	27
1998	0	1	0	0	1	1	1	0	0	13	5	1	1	2	1	19	23	24
1999	3	1	0	0	0	0	0	0	4	27	3	4	4	0	4	33	28	41
2000	0	0	1	0	0	0	0	0	3	26	4	1	1	0	3	31	38	36
2001	5	1	0	0	0	0	3	21	3	6	10	8	6	1	27	24	65	58
2002	3	1	4	7	1	12	3	6	14	36	19	2	8	20	24	58	76	109
2003	3	1	1	1	0	1	1	1	4	25	16	5	5	2	6	47	71	60
2004	1	2	6	4	3	3	4	11	4	22	13	2	9	9	19	38	84	75
2005	3	2	14	6	5	14	3						19	26				
Total sugar for domestic consumption:																		
1992	631	629	725	720	660	798	763	782	846	828	736	710	1,985	2,178	2,390	2,273	8,772	8,826
1993	619	629	791	688	685	799	782	815	836	783	755	740	2,039	2,172	2,432	2,277	8,916	8,920
1994	649	674	798	665	742	857	776	838	918	792	754	714	2,121	2,265	2,532	2,260	9,195	9,177
1995	651	644	811	694	780	837	755	894	892	853	813	713	2,105	2,311	2,542	2,379	9,218	9,337
1996	670	718	804	769	790	796	813	823	883	891	816	724	2,191	2,355	2,519	2,430	9,445	9,496
1997	678	668	797	758	801	841	813	849	928	915	778	750	2,143	2,401	2,591	2,443	9,565	9,578
1998	694	707	832	774	772	883	826	826	915	892	806	760	2,233	2,428	2,568	2,458	9,672	9,686
1999	676	704	827	798	861	894	833	916	905	947	876	757	2,208	2,553	2,655	2,580	9,873	9,996
2000	703	745	870	766	845	872	804	941	867	973	863	728	2,318	2,484	2,611	2,564	9,993	9,977
2001	781	718	871	788	837	861	835	917	828	922	849	703	2,370	2,486	2,580	2,474	10,000	9,911
2002	744	695	788	771	834	834	844	858	943	927	860	709	2,227	2,439	2,645	2,497	9,785	9,808
2003	689	685	809	772	746	841	802	856	807	896	837	771	2,183	2,360	2,464	2,504	9,504	9,511
2004	706	762	819	767	751	850	817	893	810	974	861	728	2,286	2,368	2,520	2,563	9,678	9,737
2005	724	733	868	796	816	871	814						2,325	2,483				

continued- -

Table 20--U.S. cane and beet sugar deliveries, monthly, quarterly, and by fiscal and calendar year

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	1st Q.	2nd Q.	3rd Q.	4th Q.	Fiscal	Calendar
								1,000 short tons, raw value										
Reexported in products:																		
1992	8	6	5	6	10	9	6	8	8	10	8	7	19	26	23	26	86	93
1993	10	4	9	7	7	12	14	22	20	8	8	7	23	26	57	24	132	129
1994	7	7	7	9	15	15	10	17	17	12	11	5	20	39	44	28	127	131
1995	3	7	7	8	4	7	15	18	5	6	8	7	18	18	39	21	103	96
1996	5	5	10	14	8	8	8	13	11	9	7	6	20	30	32	22	104	104
1997	32	30	6	6	7	10	12	16	17	7	6	8	68	22	45	21	157	156
1998	6	9	9	12	10	10	14	15	16	18	15	11	24	32	46	44	123	146
1999	26	19	12	14	11	10	15	10	7	9	5	7	58	35	32	21	169	145
2000	7	7	7	7	8	7	6	11	5	6	6	7	21	22	22	18	86	84
2001	8	5	8	9	10	10	11	11	8	10	16	13	21	29	30	40	98	120
2002	15	13	11	12	12	11	12	14	15	17	12	14	39	35	42	43	156	158
2003	16	13	14	14	15	20	19	15	13	16	10	9	44	49	47	35	183	175
2004	9	10	9	10	18	11	12	15	13	10	9	9	28	40	39	28	142	135
2005	7	8	9	11	9	17	11						24	37				
Polyhydric alcohol and livestock feed use:																		
1992	1	1	1	2	1	1	2	2	2	2	1	1	4	4	5	4	17	17
1993	2	2	1	1	1	1	1	1	1	1	1	1	5	4	3	2	15	14
1994	1	1	1	1	1	1	1	1	1	1	1	1	4	3	4	4	13	14
1995	1	1	2	1	2	2	1	2	2	2	1	1	4	5	4	4	17	17
1996	1	1	2	1	2	2	2	2	2	2	1	1	4	5	5	5	18	18
1997	1	1	1	2	2	2	2	2	3	2	1	2	4	6	6	5	21	21
1998	1	1	2	2	2	1	2	2	2	2	2	2	4	5	5	6	20	21
1999	1	2	2	2	2	2	2	2	2	2	2	3	5	6	6	8	24	26
2000	3	3	3	3	2	2	3	2	3	2	3	2	9	8	7	7	32	30
2001	3	3	3	3	4	3	3	4	10	4	3	2	8	10	17	9	42	44
2002	3	2	2	2	3	4	4	2	2	2	2	1	7	8	8	5	33	28
2003	2	2	2	2	2	2	2	2	3	2	3	3	6	7	7	7	24	27
2004	3	3	4	4	4	3	4	4	4	4	3	4	9	11	13	10	41	44
2005	4	4	4	4	4	5	4						12	13				
Total U.S. sugar deliveries 1/:																		
1992	640	637	731	728	671	809	771	792	856	840	745	718	2,007	2,208	2,418	2,303	8,875	8,937
1993	630	635	801	697	693	812	797	838	857	792	763	748	2,067	2,201	2,492	2,303	9,063	9,063
1994	657	682	806	675	758	873	787	856	936	804	767	720	2,145	2,307	2,579	2,291	9,334	9,322
1995	655	653	820	703	786	846	772	914	899	861	823	721	2,127	2,334	2,585	2,405	9,337	9,451
1996	676	724	815	785	800	806	822	838	896	901	824	731	2,215	2,390	2,557	2,457	9,567	9,619
1997	712	699	804	766	810	854	827	867	948	924	785	760	2,215	2,429	2,641	2,469	9,742	9,755
1998	701	718	843	787	784	894	843	843	933	912	823	773	2,261	2,465	2,619	2,508	9,815	9,854
1999	704	725	842	814	875	906	850	928	915	958	883	767	2,271	2,594	2,693	2,609	10,066	10,167
2000	713	755	880	776	855	881	813	954	875	981	871	737	2,348	2,513	2,641	2,589	10,111	10,091
2001	792	726	882	800	851	874	849	932	847	936	869	718	2,399	2,524	2,628	2,524	10,140	10,075
2002	761	710	801	786	848	849	860	874	960	946	874	724	2,272	2,483	2,694	2,544	9,973	9,994
2003	707	701	825	788	764	863	823	873	823	914	849	783	2,233	2,415	2,519	2,546	9,711	9,713
2004	718	775	832	782	773	864	833	912	827	988	873	741	2,324	2,419	2,572	2,601	9,861	9,916
2005	735	745	880	811	829	894	830						2,361	2,533				

Totals may not add due to rounding.

Note: This table commenced in October 1991 when USDA began reporting monthly production data. Puerto Rico data were added beginning October 1993.

1/ Fiscal year totals prior to 1994 differ from supply and use (table) since *WASDE* includes Puerto Rico.

Source: "*Sweetener Market Data* ," Farm Service Agency, USDA.

Table 21--U.S. sugar: Supply and use, by fiscal year 1/

Items	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05 Estimate Sep-05	2005/06 Projected Sep-05
					1,000 short tons, raw value					
Beginning stocks 2/	1,492	1,488	1,679	1,639	2,216	2,180	1,528	1,670	1,897	1,528
Total production 3/, 4/	7,204	8,021	8,366	9,050	8,769	7,900	8,426	8,649	7,950	7,963
Beet sugar	4,013	4,389	4,421	4,974	4,680	3,915	4,462	4,692	4,623	4,375
Cane sugar	3,191	3,632	3,945	4,076	4,089	3,985	3,964	3,957	3,327	3,588
Florida	1,679	1,924	2,127	1,966	2,057	1,980	2,129	2,154	1,692	1,899
Louisiana	1,054	1,262	1,325	1,683	1,585	1,580	1,367	1,377	1,207	1,256
Texas	91	80	107	105	206	174	191	175	160	180
Hawaii	340	350	384	318	241	251	276	251	268	254
Puerto Rico	27	16	3	4	0	0	0	0	0	0
Total imports	2,774	2,163	1,823	1,636	1,590	1,535	1,730	1,750	1,961	1,837
Tariff-rate quota imports 5/	2,277	1,729	1,256	1,124	1,277	1,158	1,210	1,226	1,404	1,412
Other Program Imports	493	349	386	388	238	296	488	464	400	325
Non-program imports	4	85	181	124	76	81	32	60	157	100
Statistical adjustments 3/	0	0	0	0	0	0	0	0	0	0
Total Supply	11,471	11,672	11,868	12,325	12,575	11,615	11,684	12,070	11,808	11,329
Total exports 3/	211	179	230	124	141	137	142	288	240	200
Quota-exempt for reexport	211	179	230	124	141	137	142	288	240	200
Other exports	0	0	0	0	0	0	0	0	0	0
CCC disposal, for export	0	0	0	0	0	0	0	0	0	0
Statistical difference 6/	0	0	0	0	0	0	0	0	0	0
Miscellaneous	30	-1	-67	-126	123	-24	161	23	0	0
CCC disposal, for domestic non-food use	0	0	0	0	10	0	0	0	0	0
Refining loss adjustment	0	0	0	0	0	0	0	0	0	0
Statistical adjustment 7/	30	-1	-67	-126	113	-24	161	23	0	0
Deliveries for domestic use	9,742	9,815	10,066	10,111	10,132	9,974	9,711	9,862	10,040	10,115
Transfer to sugar-cont. products for exports under re-export program	157	123	169	86	98	156	183	142	115	125
Transfer to polyhydric alcohol, feed	21	20	24	32	33	33	24	41	50	40
Deliveries for domestic food and beverage use	9,564	9,672	9,873	9,993	10,000	9,785	9,504	9,678	9,875	9,950
Total Use	9,983	9,992	10,238	10,090	10,396	10,087	10,014	10,173	10,280	10,315
Ending stocks 3/	1,488	1,679	1,639	2,216	2,180	1,528	1,670	1,897	1,528	1,014
Privately owned	1,488	1,679	1,639	1,919	1,395	1,316				
CCC	0	0	0	297	784	212				
			Percent							
Stocks-to-use ratio	14.91	16.81	16.01	21.96	20.97	15.15	16.68	18.65	14.86	9.83

NOTE: Numbers may not add due to rounding.

1/ Fiscal year beginning October 1. 2/ Stocks in hands of primary distributors and CCC. 3/ Historical data are from FSA (formerly ASCS), Sweetener Market Data, and NASS, Sugar Market Statistics prior to 1992. 4/ Production reflects processors' projections compiled by the Farm Service Agency.

5/ Actual arrivals under the tariff-rate quota (TRQ) with late entries, early entries, and (TRQ) overfills assigned to the fiscal year in which they actually arrived. The 2004/05 available TRQ assumes shortfall of 50,000 tons. 6/ Receipts compiled by NASS and FSA Customs data. 7/ Calculated as a residual. Largely consists of invisible stocks change.

Source: USDA.

Table 22--U.S. high fructose corn syrup (HFCS) deliveries, quarterly, by fiscal and calendar year 1/

Quarter and Year	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005 2/
	1,000 short tons, dry weight										
Quarter											
I	1,762	1,833	1,920	1,975	2,072	2,129	2,165	2,114	2,122	2,185	2,128
II	2,126	2,241	2,311	2,439	2,482	2,482	2,370	2,527	2,469	2,438	2,408
III	2,097	2,141	2,286	2,399	2,440	2,400	2,433	2,491	2,408	2,361	2,316
IV	1,748	1,841	2,000	2,066	2,188	2,103	2,181	2,161	2,136	2,076	2,053
Year											
Fiscal	7,671	7,964	8,358	8,812	9,061	9,200	9,072	9,313	9,160	9,120	8,928
Calendar	7,733	8,057	8,517	8,879	9,183	9,114	9,149	9,293	9,135	9,060	8,905

1/ Includes Puerto Rico. 2/ Forecast.

Source: Economic Research Service, USDA.

Table 23--U.S. high fructose corn syrup (HFCS) production, quarterly, by fiscal and calendar year 1/

Quarter and Year	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005 2/
	1,000 short tons, dry weight										
Quarter											
I	1,760	1,830	1,946	2,012	2,122	2,169	2,193	2,105	2,119	2,183	2,143
II	2,136	2,267	2,352	2,540	2,547	2,553	2,400	2,541	2,484	2,446	2,446
III	2,111	2,163	2,348	2,476	2,503	2,438	2,442	2,498	2,412	2,359	2,333
IV	1,752	1,897	2,031	2,123	2,240	2,155	2,201	2,158	2,135	2,076	2,051
Year											
Fiscal	7,701	8,012	8,543	9,059	9,295	9,399	9,190	9,345	9,173	9,123	8,998
Calendar	7,759	8,157	8,677	9,150	9,412	9,315	9,236	9,302	9,150	9,064	8,973

1/ Includes Puerto Rico. 2/ Forecast.

Source: Economic Research Service, USDA.

Table 24--U.S. high fructose corn syrup (HFCS) supply and use, calendar year 1/

Calendar year	Supply					Utilization			
	Domestic production				Total		Domestic disappearance		
	HFCS-42	HFCS-55	Total	Imports	supply	Exports	HFCS-42	HFCS-55	Total
	1,000 short tons, dry weight								
1992	2,793	3,841	6,634	193	6,827	100	2,822	3,905	6,727
1993	2,924	4,173	7,097	189	7,286	113	2,918	4,255	7,173
1994	2,994	4,474	7,467	137	7,605	123	3,005	4,476	7,481
1995	3,055	4,705	7,759	79	7,838	104	3,075	4,658	7,733
1996	3,076	5,081	8,157	123	8,280	224	3,095	4,962	8,057
1997	3,187	5,490	8,677	116	8,793	276	3,225	5,291	8,517
1998	3,296	5,854	9,150	117	9,267	388	3,318	5,561	8,879
1999	3,523	5,889	9,412	121	9,533	350	3,546	5,637	9,183
2000	3,519	5,796	9,315	121	9,436	321	3,550	5,565	9,114
2001	3,496	5,740	9,236	148	9,384	235	3,556	5,593	9,149
2002	3,640	5,662	9,302	136	9,438	145	3,695	5,599	9,294
2003	3,632	5,518	9,150	144	9,294	159	3,692	5,443	9,135
2004	3,611	5,452	9,063	156	9,219	160	3,685	5,374	9,059
2005 2/	3,667	5,306	8,973	154	9,127	222	3,732	5,173	8,905

1/ Includes Puerto Rico. 2/ Forecast.

Source: Economic Research Service, USDA.

Table 25--Net cost of corn starch to U.S. wet-millers, Midwest markets

Period	Yellow dent corn 1/	Corn byproducts: Corn oil	Corn byproducts: Corn gluten feed	Corn byproducts: Corn gluten meal	Byproduct credits: Corn oil	Byproduct credits: Corn gluten feed	Byproduct credits: Corn gluten meal	Byproduct credits: Total byproduct	Net cost: Corn	Net cost: Corn starch	Net cost: Corn sweetener
	Dollars per bu	Cents per lb	Dollars per short ton		----Cents per bushel----			Dollars per bu	Dollars per bu	--Cents per lb--	
1991	2.40	28.36	101.57	256.07	43.96	68.56	33.93	1.46	0.94	2.97	2.81
1992	2.33	23.89	102.80	259.72	37.03	69.39	34.41	1.41	0.92	2.93	2.77
1993	2.27	21.52	87.99	296.53	33.35	59.39	39.29	1.32	0.95	3.02	2.85
1994	2.40	27.22	89.59	262.50	42.19	60.47	34.78	1.37	1.03	3.26	3.08
1995	2.70	26.67	88.34	244.02	41.33	59.63	32.33	1.33	1.37	4.34	4.10
1996	3.82	24.52	116.25	332.40	38.00	78.47	44.04	1.61	2.22	7.04	6.65
1997	2.67	24.87	83.99	345.22	38.55	56.69	45.74	1.41	1.26	4.00	3.78
1998	2.23	29.90	64.86	260.54	46.34	43.78	34.52	1.25	0.98	3.12	2.95
1999	1.92	23.59	58.77	231.88	36.56	39.67	30.72	1.07	0.85	2.68	2.54
2000	1.88	14.66	51.71	237.63	22.72	34.90	31.49	0.89	0.98	3.13	2.95
2001	1.90	15.75	62.46	253.98	24.41	42.16	33.65	1.00	0.90	2.86	2.70
2002	2.17	20.78	60.33	243.72	32.21	40.72	32.29	1.05	1.12	3.55	3.36
2003	2.29	28.65	72.15	251.36	44.40	48.70	33.31	1.26	1.02	3.25	3.07
2004	2.39	27.59	72.01	308.44	42.76	48.61	40.87	1.32	1.07	3.39	3.20
2004											
Jan.	1.86	27.41	53.63	245.63	42.49	36.20	32.55	1.11	0.75	2.37	2.24
Feb.	1.86	27.58	51.38	232.50	42.75	34.68	30.81	1.08	0.78	2.47	2.33
Mar.	1.97	28.08	51.90	240.50	43.52	35.03	31.87	1.10	0.87	2.75	2.60
I	1.90	27.69	52.30	239.54	42.92	35.30	31.74	1.10	0.80	2.53	2.39
Apr.	1.94	29.29	51.75	246.25	45.40	34.93	32.63	1.13	0.81	2.57	2.43
May	1.93	30.65	52.80	274.60	47.51	35.64	36.38	1.20	0.73	2.33	2.20
June	2.02	30.73	50.63	322.13	47.63	34.18	42.68	1.24	0.78	2.46	2.33
II	1.96	30.22	51.73	280.99	46.85	34.92	37.23	1.19	0.77	2.46	2.32
July	2.20	30.01	50.38	334.25	46.52	34.01	44.29	1.25	0.95	3.02	2.86
Aug.		28.83									

1/ Reported prices are Illinois points. These corn values represent country elevator producer bid prices and do not reflect the additional costs of handling and transporting the corn to Midwest processing plants.

NQ = no quote

Sources: *Grain and Feed Market News,* Agricultural Marketing Service, Livestock and Seed Division; Economic Research Service, USDA, byproduct credits and net cost calculations.

Table 26--U.S. use of field corn, by crop year 1/

Description	1995/96	1996/97	1997/98	1998/99	1999/2000	2000/01	2001/02	2002/03	2003/04	2004/05 2/	2005/06 2/
HFCS	473	492	513	530	540	530	541	532	530	520	520
Glucose syrup and dextrose	227	233	229	219	222	218	217	219	228	222	220
Total corn sweetener	700	725	742	749	761	748	758	751	758	742	740
Corn starch	226	238	246	240	251	247	246	256	272	280	285
Wet milling excluding alcohol	926	963	988	989	1,013	995	1,003	1,007	1,030	1,022	1,025
Alcohol											
Fuel	396	429	481	526	566	628	714	996	1,168	1,325	1,500
Beverage	125	130	133	127	130	130	131	131	132	133	135
Total	521	559	614	653	696	758	845	1,127	1,300	1,458	1,635
Total	1,447	1,522	1,602	1,642	1,709	1,753	1,848	2,133	2,329	2,480	2,660
U.S. corn crop	7,374	9,233	9,207	9,759	9,431	9,915	9,503	8,967	10,089	11,807	10,639
Corn sweetener share	9.49	7.85	8.06	7.67	8.07	7.54	7.97	8.38	7.52	6.29	6.96
Wet milling excluding alcohol share	12.56	10.43	10.73	10.13	10.74	10.04	10.56	11.23	10.21	8.66	9.63
Alcohol share	7.07	6.05	6.67	6.69	7.38	7.64	8.89	12.56	12.88	12.35	15.37
Total	19.62	16.48	17.40	16.83	18.12	17.68	19.45	23.79	23.09	21.01	25.00

1/ September/August crop year. 2/ Forecast.

Source: Economic Research Service, USDA.

Table 27--U.S. maple syrup production and value, by State, calendar years

State and Region	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
					Production -- 1,000 Gallons						
New England:											
Connecticut	7	10	9	9	13	7	9	10	10	11	10
Maine	162	167	185	170	195	250	200	275	285	290	265
Massachusetts	29	49	44	47	44	39	34	48	37	50	40
New Hampshire	64	89	76	67	61	75	45	83	60	83	57
Vermont	365	550	395	360	370	460	275	510	420	500	410
Total	627	865	709	653	683	831	563	926	812	934	782
Northeast:											
New York	208	343	269	231	195	210	193	260	210	255	222
Midwest:											
Pennsylvania	43	71	63	72	67	47	69	60	52	60	61
Ohio	65	90	95	78	95	34	96	75	51	78	69
Michigan	55	88	75	55	73	44	60	75	59	80	58
Minnesota	0	0	0	0	0	0	0	0	0	0	0
Wisconsin	98	110	87	70	75	65	68	79	76	100	50
Total	261	359	320	275	310	190	293	289	238	318	238
U.S. total	1,096	1,567	1,298	1,159	1,188	1,231	1,049	1,475	1,260	1,507	1,242
					Value of Production -- 1,000 dollars						
New England:											
Connecticut	281	427	375	370	556	307	411	472	486	569	
Maine	2,965	3,657	3,663	3,502	3,783	3,550	3,740	5,335	6,413	5,626	
Massachusetts	1,105	1,906	1,637	1,701	1,707	1,474	1,380	1,896	1,550	2,315	
New Hampshire	2,413	3,311	3,055	2,425	2,281	2,858	1,800	3,411	2,580	2,938	
Vermont	10,147	14,575	10,902	10,440	10,730	13,800	8,470	13,770	11,676	13,650	
Total	16,911	23,876	19,632	18,438	19,057	21,989	15,801	24,884	22,705	25,098	
Northeast:											
New York	4,888	8,747	6,752	6,202	5,324	6,090	5,694	6,838	5,628	7,191	
Midwest:											
Pennsylvania	1,079	1,747	1,638	1,872	1,742	1,335	1,746	1,602	1,425	1,740	
Ohio	1,872	2,565	2,926	2,324	2,850	1,166	3,005	2,423	1,790	2,496	
Michigan	1,480	2,737	2,363	1,760	2,058	1,544	1,782	2,438	1,841	3,040	
Minnesota	--	--	--	--	--	--	--	--	--	--	
Wisconsin	2,489	2,497	1,905	1,617	1,778	1,800	1,986	2,315	2,212	3,230	
Total	6,920	9,546	8,832	7,573	8,428	5,845	8,519	8,778	7,268	10,506	
U.S. total	28,719	42,169	35,216	32,213	32,809	33,924	30,014	40,500	35,601	42,795	
					Price per gallon -- dollars						
New England:											
Connecticut	40.14	42.70	41.67	41.11	42.77	43.86	45.67	47.20	48.60	51.73	--
Maine	18.30	21.90	19.80	20.60	19.40	14.20	18.70	19.40	22.50	19.40	--
Massachusetts	38.10	38.90	37.20	36.19	38.80	37.79	40.59	39.50	41.89	46.30	--
New Hampshire	37.70	37.20	40.20	36.19	37.39	38.11	40.00	41.10	43.00	35.40	--
Vermont	27.80	26.50	27.60	29.00	29.00	30.00	30.80	27.00	27.80	27.30	--
Total	26.97	27.60	27.69	28.24	27.90	26.46	28.07	26.87	27.96	26.87	--
Northeast:											
New York	23.50	25.50	25.10	26.85	27.30	29.00	29.50	26.30	26.80	28.20	--
Midwest:											
Pennsylvania	25.09	24.61	26.00	26.00	26.00	28.40	25.30	26.70	27.40	29.00	--
Ohio	28.80	28.50	30.80	29.79	30.00	34.29	31.30	32.31	35.10	32.00	--
Michigan	26.91	31.10	31.51	32.00	28.19	35.09	29.70	32.51	31.20	38.00	--
Minnesota											
Wisconsin	25.40	22.70	21.90	23.10	23.71	27.69	29.21	29.30	29.11	32.30	--
Total	26.51	26.59	27.60	27.54	27.19	30.76	29.08	30.37	30.54	33.04	--
U.S. total	26.20	26.90	27.10	27.80	27.60	27.56	28.61	27.46	28.25	28.40	--

-- = not available

Source: National Agricultural Statistics Service, USDA.

Table 28--Shipments, exports, imports, and apparent consumption of confectionery products

Year	Population	Manufacturers' shipments	Exports of domestic merchandise	Imports for consumption	Apparent consumption	Per capita consumption	Imports as percentage of consumption
	--Millions--	------Short tons------				--Pounds--	--Percent--
			Chocolate-type confectionery				
1995	266.6	1,515,925	79,464	89,447	1,525,907	11.45	5.86
1996	269.7	1,550,048	86,421	88,104	1,551,731	11.51	5.68
1997	272.9	1,613,503	94,199	96,781	1,616,085	11.84	5.99
1998	276.1	1,625,556	84,641	101,979	1,642,894	11.90	6.21
1999	279.3	1,608,051	90,168	109,704	1,627,588	11.65	6.74
2000	282.3	1,645,622	136,141	127,721	1,637,203	11.60	7.80
2001	285.0	1,629,723	191,987	142,260	1,579,995	11.09	9.00
2002	287.7	1,662,999	137,454	150,693	1,676,238	11.65	8.99
2003	290.3	1,676,262	137,197	178,808	1,717,873	11.94	10.41
2004	293.0	1,654,514	131,683	192,576	1,715,406	11.93	11.23
			Nonchocolate-type confectionery				
1995	--	1,411,612	72,091	160,642	1,500,163	11.26	10.71
1996	--	1,523,949	77,311	173,926	1,620,565	12.02	10.73
1997	--	1,571,466	91,462	195,240	1,675,244	12.28	11.65
1998	--	1,536,032	90,391	229,035	1,674,676	12.13	13.68
1999	--	1,396,721	90,183	273,313	1,579,850	11.31	17.30
2000	--	1,377,233	108,220	300,252	1,569,264	11.12	19.13
2001	--	1,207,365	112,884	331,371	1,425,851	10.01	23.24
2002	--	1,142,433	95,307	381,785	1,428,911	9.93	26.72
2003	--	1,123,569	97,001	466,584	1,493,152	10.38	31.25
2004	--	1,129,341	93,849	526,571	1,562,063	10.86	33.71
			Chewing gum, sugar and nonsugar				
1995	--	NA	16,817	37,799	NA	NA	NA
1996	--	NA	15,487	38,883	NA	NA	NA
1997	--	212,606	22,250	45,284	235,640	1.73	19.22
1998	--	203,414	17,864	45,243	230,793	1.67	19.60
1999	--	196,597	16,291	49,126	229,432	1.64	21.41
2000	--	203,213	13,014	47,449	237,648	1.68	19.97
2001	--	215,230	12,012	46,414	249,632	1.75	18.59
2002	--	217,011	18,776	51,911	250,146	1.74	20.75
2003	--	223,535	20,179	59,045	262,402	1.82	22.50
2004	--	213,840	16,363	60,916	258,393	1.80	23.57
			Total confectionery				
1995	--	NA	168,373	287,888	NA	NA	NA
1996	--	NA	179,219	300,913	NA	NA	NA
1997	--	3,397,575	207,911	337,305	3,526,969	25.85	9.56
1998	--	3,365,002	192,896	376,257	3,548,363	25.70	10.60
1999	--	3,201,369	196,642	432,142	3,436,869	24.61	12.57
2000	--	3,226,069	257,375	475,422	3,444,116	24.40	13.80
2001	--	3,052,317	316,884	520,045	3,255,478	22.84	15.97
2002	--	3,022,443	251,536	584,389	3,355,296	23.33	17.42
2003	--	3,023,367	254,377	704,437	3,473,427	24.15	20.28
2004	--	2,997,694	241,894	780,063	3,535,862	24.58	22.06

Source: U.S. Census Bureau.