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Report Highlights:

Brazil's Marketing Year (MY) 2022/23 sugarcane crop is forecast to recover to 613 million metric tons (mmt), an increase of six percent compared to the final estimate for MY 2021/22 (576 mmt), supported by better weather conditions vis-à-vis the previous year. Sugar prices remain significantly attractive which should result in an unchanged sugar-ethanol production mix relative to the previous season. The revised estimate for Brazilian exports in MY 2021/22 is 25.65 mmt, raw value. Brazil remains the second-largest recipient of the U.S. sugar tariff-rate quota. Currently, FY 2022 sugar TRQ for Brazil is allocated at 152,691 metric tons, raw value.

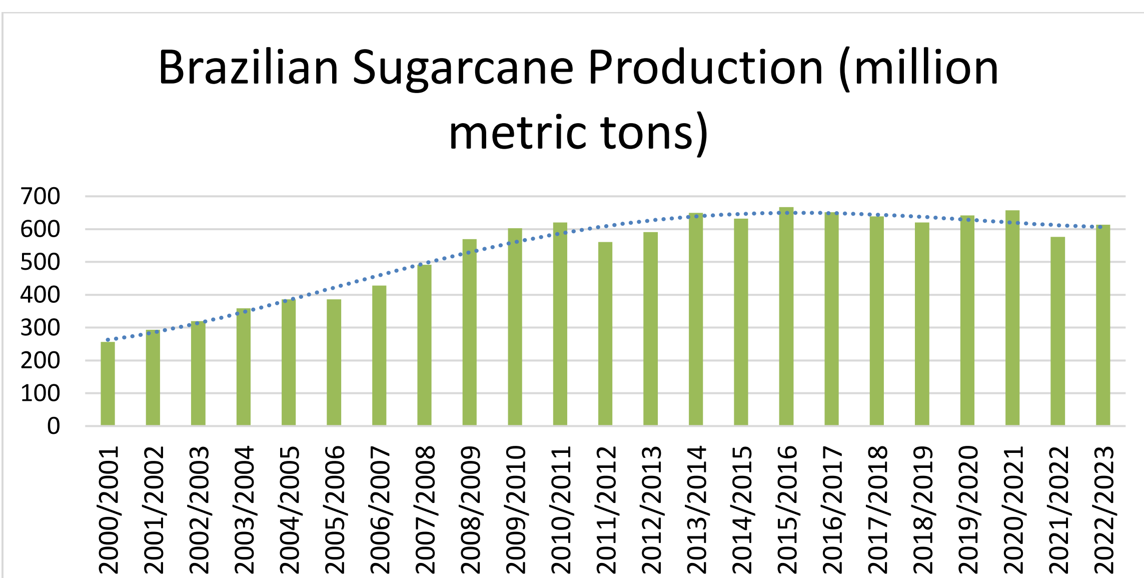
Sugarcane Production

The Agricultural Trade Office (ATO)/Sao Paulo forecasts the Brazilian sugarcane crop for the marketing year (MY April-March) 2022/23 at 613 million metric tons (mmt), an increase of six percent compared to the final estimate for MY 2021/22 (576 mmt). The Center-South (CS) region should harvest 560 mmt of sugarcane, up 37 mmt vis-a-vis the revised figure for the last crop (605 mmt).

Sugarcane fields in the CS have not totally recovered from the weather adversities in 2020 and 2021, e.g., the long and below-average rainfall period in 2020 and January-September 2021, and the severe frosts in late June and July. However, the good rainfall volume that has prevailed since October 2021, although irregularly distributed in the different production regions, should partially offset the negative impact of the aforementioned adversities, thus supporting a partial recovery of the production potential. A marginal replacement of the sugarcane area with soybeans and corn is also expected, thus reducing the sugarcane crushing area. The current conflict in Ukraine has brought no significant impact to the current sugarcane crop, given that fertilizer purchases/utilization have occurred beforehand. However, if the war persists, fertilizer supply might be an issue for next year's crushing.

The late development of the sugarcane fields to be harvested in the first third of the crushing season has led sugar/ethanol plants to postpone the beginning of the 22/23 crushing season to late April and May. Updated statistics from the Brazilian Sugarcane Industry Association (UNICA) reports that by the end of March, there were 16 units crushing sugarcane for sugar/ethanol production and nine units processing corn ethanol, as opposed to 37 units producing sugar/ethanol from sugarcane and 10 corn ethanol units in operation during the same period in the previous MY.

North-Northeastern (NNE) production for MY 2022/23 is forecast at 53 mmt, unchanged from the revised figure for MY 2021/22 (53 mmt), assuming that normal weather conditions prevail until the beginning of the crop in the second semester of the year. The crushing of the MY 2021/22 season is virtually over. The graph below shows the evolution of Brazilian sugarcane production since 2000.



Source: USDA/ATO/Sao Paulo

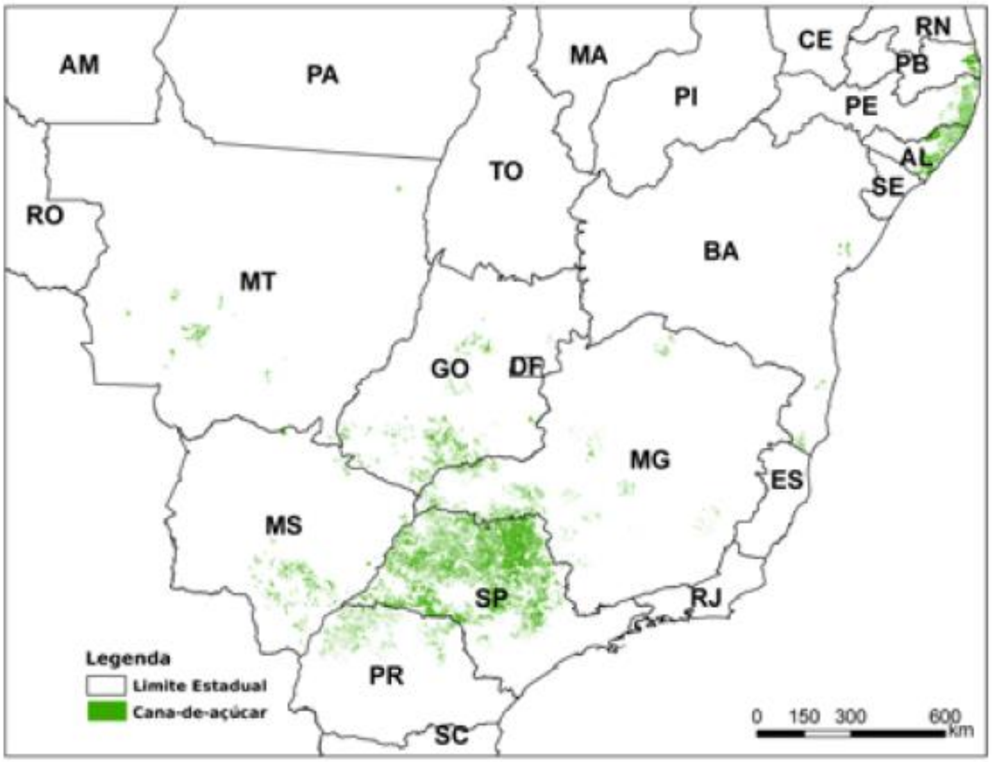
The following tables show monthly sugarcane crush data for the state of Sao Paulo and the Center-South (CS) region for MY 2018/19 through MY 2021/22 (April through mid-March), as reported by UNICA. According to updated data released by UNICA, the total sugarcane crushed during MY 2021/22 amounted 523.11 mmt, a decrease of 14 percent vis-à-vis the previous MY. Sao Paulo represents approximately 57 percent of the CS production.

Sugarcane Crushed in the State of Sao Paulo (1,000 metric tons)				
Month	**18/19**	**19/20**	**20/21**	**21/22**
April	36,990	25,180	37,970	23,508
May	46,306	50,390	52,642	50,824
June	53,019	52,524	50,182	48,555
July	54,203	52,662	57,731	53,786
August	44,695	53,390	52,776	51,358
September	38,841	43,676	49,759	43,095
October	27,946	42,907	37,895	19,282
November	20,397	17,106	15,230	7,028
December	6,855	1,261	617	191
January	173	20	10	0
February	65	0	17	0
March 1/	3,848	4,635	1,679	0
Cumulative	333,338	343,750	356,508	297,628
Source: Brazilian Sugarcane Industry Association (UNICA). 1/ March 2022 up to March 15.				

Sugarcane Crushed in Center-Southern Brazil (1,000 metric tons)				
Month	**18/19**	**19/20**	**20/21**	**21/22**
April	60,170	45,628	60,702	43,326
May	75,418	83,347	84,764	87,053
June	88,060	89,079	84,928	81,917
July	92,880	90,906	97,596	92,966
August	77,214	90,831	88,829	87,955
September	66,601	74,813	85,056	74,450
October	50,607	70,403	63,919	36,723
November	36,103	30,772	29,101	16,457
December	15,459	3,309	2,482	777
January	1,120	214	257	0
February	823	629	1,156	159
March 1/	8,714	10,431	6,672	142
Cumulative	573,169	590,361	605,462	521,926
Source: Brazilian Sugarcane Industry Association (UNICA). 1/ March 2022 up to March 15.				

Area Planted to Sugarcane

Total MY 2022/23 area planted to sugarcane is forecast at 9.65 million hectares (ha), down over one percent relative to the previous crop. Steady grain prices remain encouraging the migration of marginal sugarcane areas to soybeans and corn. The map below illustrates sugarcane-planted areas in Brazil. The center-southern states (SP, PR, MG, MS, MT, and GO) represent over 90 percent of total sugarcane output and the crop season extends from April through March. In contrast, the north-northeastern states (AL, PE, PB, RN, and BA) account for less than ten percent of the total volume and crushing occurs during the September-August crop season.



Source: MAPA/CONAB (Ministerio da Agricultura, Pecuaria e Abastecimento/Companhia Nacional de Abastecimento, May 2021)

ATO/Sao Paulo forecasts total sugarcane area for crushing for MY 2022/23 at 9.2 million ha, an over one percent reduction compared to MY 2021/22 (9.35 million ha). The table below shows the sugarcane harvested area from 2014 through 2021, according to the Ministry of Agriculture, Livestock and Supply's (MAPA) National Supply Company (CONAB) and the Agricultural Economics Institute (IEA) of the State of Sao Paulo Secretariat of Agriculture.

Area Harvested to Sugarcane (1,000 ha)								
	2014	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
Brazil	9,004.5	8,654.8	9,049.2	8,729.5	8,589.2	8,442.0	8,616.1	8,264.4
Sao Paulo	5,539.7	5,605.7	5,569.2	5,601.2	5,644.9	5,608.6	5,585.5	5,547.5
Sources: CONAB, IEA.								

Genetically Modified Sugarcane Varieties

The Sugarcane Technological Center (CTC - Centro de Tecnologia Canavieira) remains the world leader in producing genetically modified (GM) sugarcane varieties. CTC currently supplies four different sugarcane GM varieties (CTC9003BT, CTC9001BT, CTC7515BT and CTC20 BT) which contain genes from a soil bacterium called Bacillus Thuringiensis (or BT), allowing the plant to produce proteins that are toxic to cane borer and act as an insecticide. The varieties can be used to produce sugar and ethanol. Industry contacts report that area planted to GM varieties are estimated at 37,000 ha in MY 2021/22 and forecast at 70,000 ha for MY 2022/23.

Agricultural and Industrial Yields

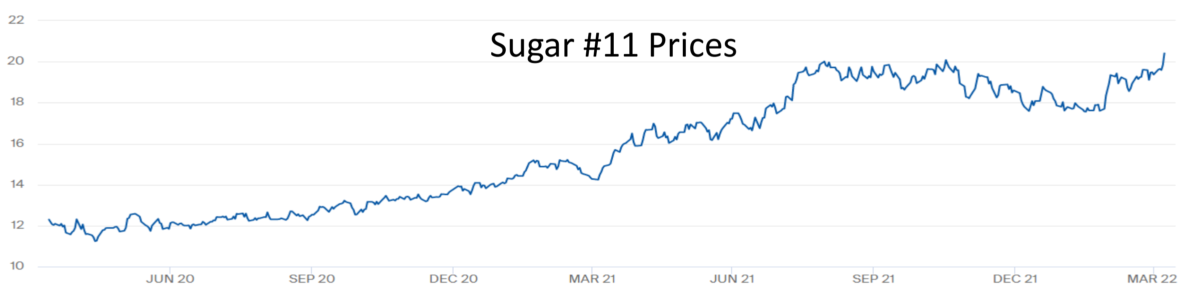
The MY 2022/23 Brazilian sugarcane agricultural yield is projected at 66.63 metric tons (mt)/hectare (ha), an increase of eight percent vis-a-via the previous crushing season (69.52 mt/ha), due to better weather conditions favoring stock development. Note that in spite of likely better agricultural yield, sugarcane fields have not fully recovered from dry weather and frost during 2020 and 2021.

The MY 2021/22 industrial yield is projected at 137.31 kg of TRS (total reducing sugars)/mt, a decrease of three percent vis-à-vis the previous season (141.6 mt/ha), assuming that normal weather conditions prevail during the crushing. The dry weather during 2021 favored an above-average industrial yield for the 2021/22 crushing. The following table shows historic Brazilian yields measured in TRS per metric ton of sugarcane.

Sugarcane Industrial Yields (kg TRS/metric ton)						
	MY 2017/18	**MY 2018/19**	**MY 2019/20**	**MY 2020/21**	**MY 2021/22**	**MY 2022/23 1/**
TRS/ton	136.45	137.52	138.15	143.62	141.60	137.31
Souce: USDA/FAS/ATO/Sao Paulo. 1/Estimate						

Sugar and Ethanol Production Mix

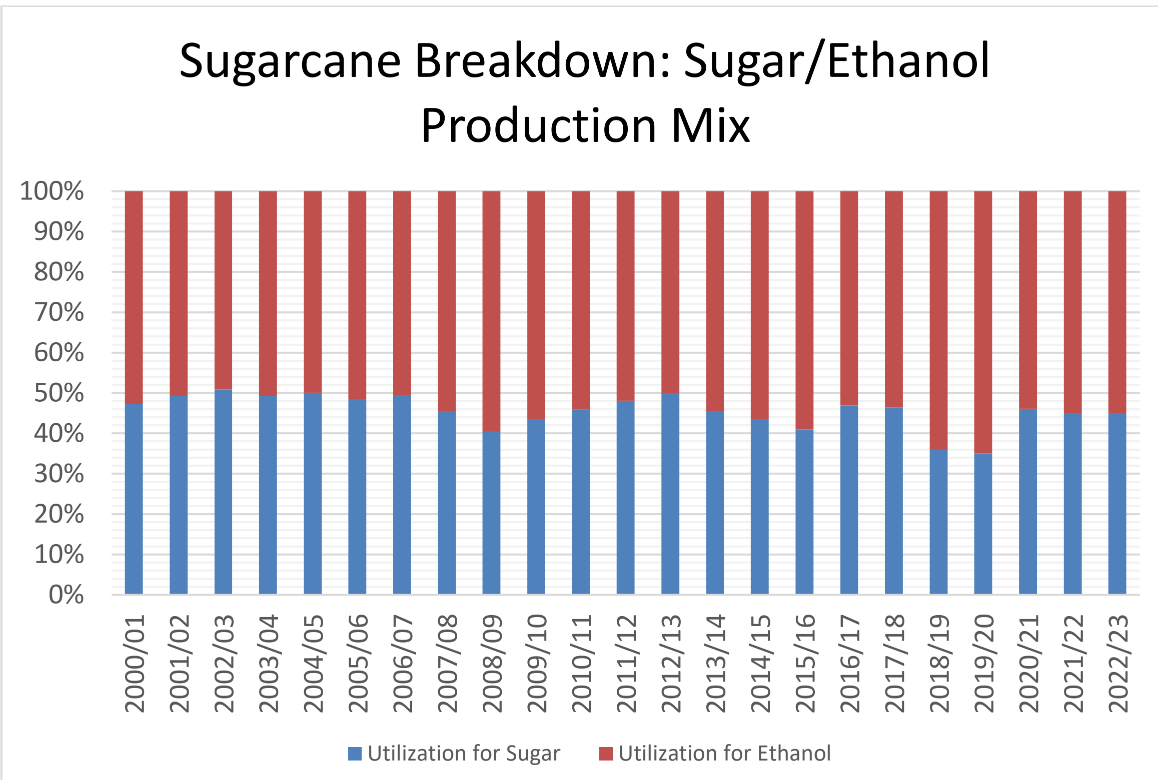
Brazilian sugar-ethanol mills have the unique ability to adjust the ratio of their ethanol and sugar production. As shown in the graph below, sugar prices have remained significantly encouraging, which portrays sugar #11 prices reported by the Intercontinental Exchange (ICE). Post contacts report that several plants anticipated hedging operations for 2022/23 sales taking advantage of the attractive sugar prices and that producers have already contracted roughly 70 percent of the expected sugarproduction for this season.



Source: Intercontinental Exchange (ICE).

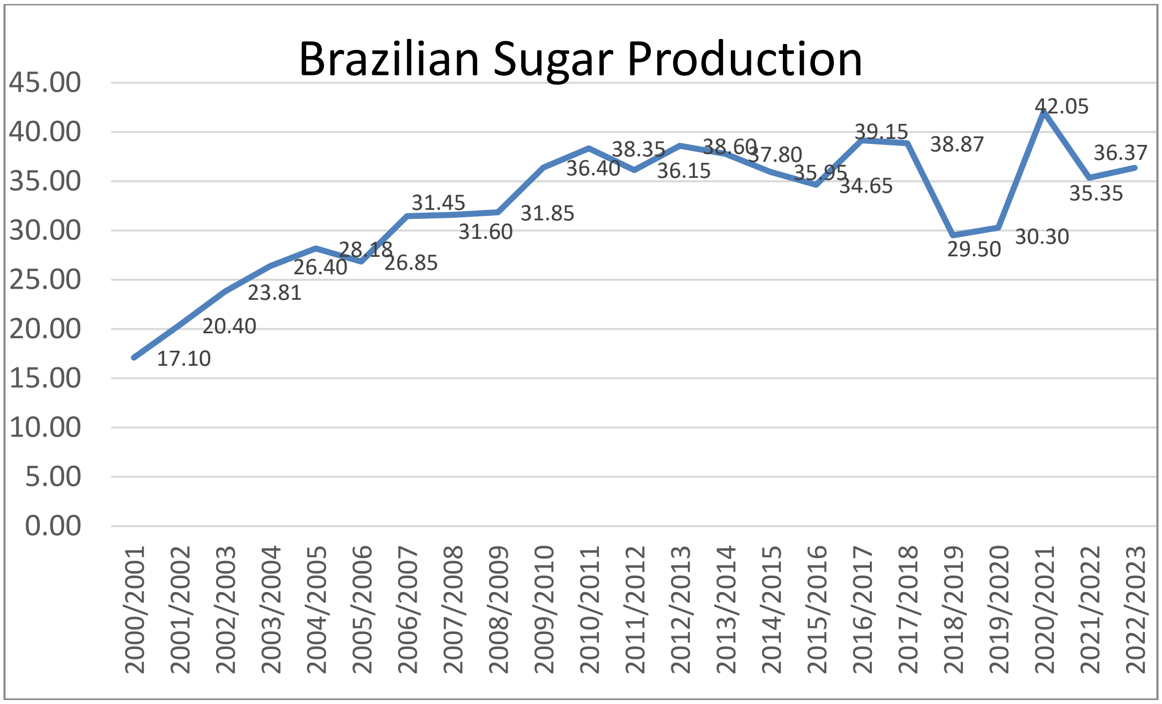
In addition, ethanol consumption has not recovered from pre-pandemic volumes. Although high gasoline prices might encourage more ethanol demand, producers are likely to keep the sugar-ethanol production mix unchanged from the previous MY. Therefore, ATO/Sao Paulo projects the total sucrose (total reducing sugar, TRS) content diverted to sugar and ethanol production for MY 2022/23 at 45 and 55 percent, respectively, unchanged from MY 2021/22.

The graph below shows the historical sugar/ethanol production mix breakdown. Note the shift towards more sugar production for MY 2020/21 and 2021/22 compared to the previous two crops, when higher ethanol demand combined with less attractive sugar prices favored more ethanol production.



Source: USDA/ATO/Sao Paulo

Brazil is the top world sugar producer with approximately 20 percent of the total production. ATO/Sao Paulo forecasts sugar production for MY 2022/23 at 36.37 mmt, raw value, an increase of three percent compared to MY 2021/22 (35.35 mmt), due to the expected higher volume of sugarcane for crushing. The center-southern states should account for 33.33 mmt, raw value, up three percent relative to last year (32.35 mmt). The north-northeast sugar production should remain relatively stable at 3.07 mmt of sugar, raw value as opposed to 3 mmt in the previous season. The graph below shows the evolution of sugar production since MY 2000/01.



Source: USDA/ATO/Sao Paulo

According to updated data released by UNICA, total sugar production in the center-south for MY 2021/22 is 32.06 mmt, a decrease of 16 percent compared to the same period in the previous MY. The following tables show monthly sugar production data for the state of Sao Paulo and the Center-South (CS) region for MY 2018/19 through MY 2021/22 (April through mid-March), as reported by UNICA.

Sugar Production in the State of Sao Paulo (Metric Tons, tel quel)				
Month	**18/19**	**19/20**	**20/21**	**21/22**
April	1,587,271	896,261	2,077,035	1,247,979
May	2,344,445	2,460,600	3,540,325	3,402,747
June	3,000,593	2,832,346	3,654,178	3,530,241
July	3,443,977	3,035,918	4,438,414	4,083,612
August	2,783,609	3,223,921	4,277,177	4,080,058
September	2,341,665	2,646,859	4,139,938	3,342,597
October	1,373,240	2,458,387	2,984,984	1,311,277
November	959,922	775,289	1,116,555	470,779
December	256,274	27,963	46,235	11,078
January	2,185	0	0	0
February	680	0	0	0
March 1/	84,132	157,589	49,306	0
Cumulative	18,177,993	18,515,133	26,324,147	21,480,368
Source: Brazilian Sugarcane Industry Association (UNICA). 1/ March 2022 up to March 15.				

Sugar Production in Center-Southern Brazil (Metric tons, tel quel)				
Month	**18/19**	**19/20**	**20/21**	**21/22**
April	2,250,044	1,382,273	3,004,807	2,156,915
May	3,261,570	3,475,214	5,042,277	5,033,945
June	4,273,632	4,082,023	5,298,051	5,149,836
July	5,017,555	4,423,054	6,469,897	6,024,308
August	4,098,579	4,651,032	6,170,137	5,962,038
September	3,446,968	3,835,497	6,069,945	4,890,336
October	2,082,798	3,432,103	4,356,601	2,009,965
November	1,419,066	1,139,066	1,674,592	797,446
December	496,701	63,113	105,222	23,974
January	18,281	7,922	9,559	0
February	2,876	2,508	40,023	0
March 1/	147,911	267,549	223,828	0
Cumulative	26,515,981	26,761,354	38,464,939	32,048,763
Source: Brazilian Sugarcane Industry Association (UNICA). 1/ March 2022 up to March 15.				

According to the Ministry of Agriculture, Livestock and Supply (MAPA), cumulative sugar production for the 2021/22 crop (from April 1, 2021 to March 15, 2022) was 34.88 mmt, tel quell, whereas ethanol production was 29.63 (11.13 billion liters of anhydrous and 18.49 billion liters of hydrous ethanol). The table below shows updated estimates for sugarcane, sugar, and ethanol production by state for 2021/22, as reported by MAPA.

Cane, Sugar & Ethanol Production: 2021/22 Crop (MT and 000 Liters)					
			Ethanol		
State/Region	**Cane**	**Sugar**	**Anhydrous**	**Hydrous**	**Total**
Espirito Santo	2,568,141	126,482	80,060	31,385	111,445
Goias	70,269,210	2,190,961	997,891	3,968,770	4,966,661
Minas Gerais	63,947,723	4,139,858	1,112,347	1,712,721	2,825,068
Mato Grosso Sul	40,241,470	1,373,793	745,093	1,708,434	2,453,527
Mato Grosso	15,291,765	451,622	1,275,691	2,701,104	3,976,795
Parana	31,961,636	2,326,797	552,852	620,436	1,173,288
Rio de Janeiro	1,119,163	11,113	0	74,106	74,106
Rio Grande Sul	0	0	0	0	0
Sao Paulo	298,494,849	21,405,894	5,347,976	6,595,760	11,943,736
Center South	**523,893,957**	**32,026,520**	**10,111,910**	**17,412,716**	**27,524,626**
Acre	0	0	0	0	0

Amazonas	306,309	14,654	0	7,697	7,697
Ceara	0	0	0	0	0
Maranhao	2,266,862	28,757	154,101	9,724	163,825
Para	1,179,980	51,572	41,631	13,521	55,152
Piaui	1,468,845	100,629	26,652	17,487	44,139
Rondonia	0	0	0	0	0
Tocantins	2,309,418	0	90,846	104,702	195,548
North	**7,531,414**	**195,612**	**313,230**	**153,131**	**466,361**
Alagoas	17,895,135	1,376,649	195,236	233,385	428,621
Bahia	4,654,051	129,649	121,002	191,077	312,079
Paraiba	5,609,295	120,856	214,837	134,293	349,130
Pernambuco	12,647,711	798,828	131,355	236,208	367,563
Rio Grande Norte	2,525,433	141,920	27,336	58,179	85,515
Sergipe	2,195,534	97,361	19,147	79,937	99,084
Northeast	**45,527,159**	**2,665,263**	**708,913**	**933,079**	**1,641,992**
TOTAL	**576,952,530**	**34,887,395**	**11,134,053**	**18,498,926**	**29,632,979**
Source: Ministry of Agriculture, Livestock and Supply-Sugar, Alcohol Dept, 03/16/2022					

Sugarcane and Sugar Prices in the Domestic Market

Sugarcane prices received by third-party suppliers for the major producing states are based on a formula that takes into account prices for sugar and ethanol in both the domestic and international markets. The State of São Paulo Sugarcane, Sugar and Ethanol Growers Council (CONSECANA) was the first to develop this formula, and it is used for the state of Sao Paulo, which comprises approximately 60 percent of center-south production.

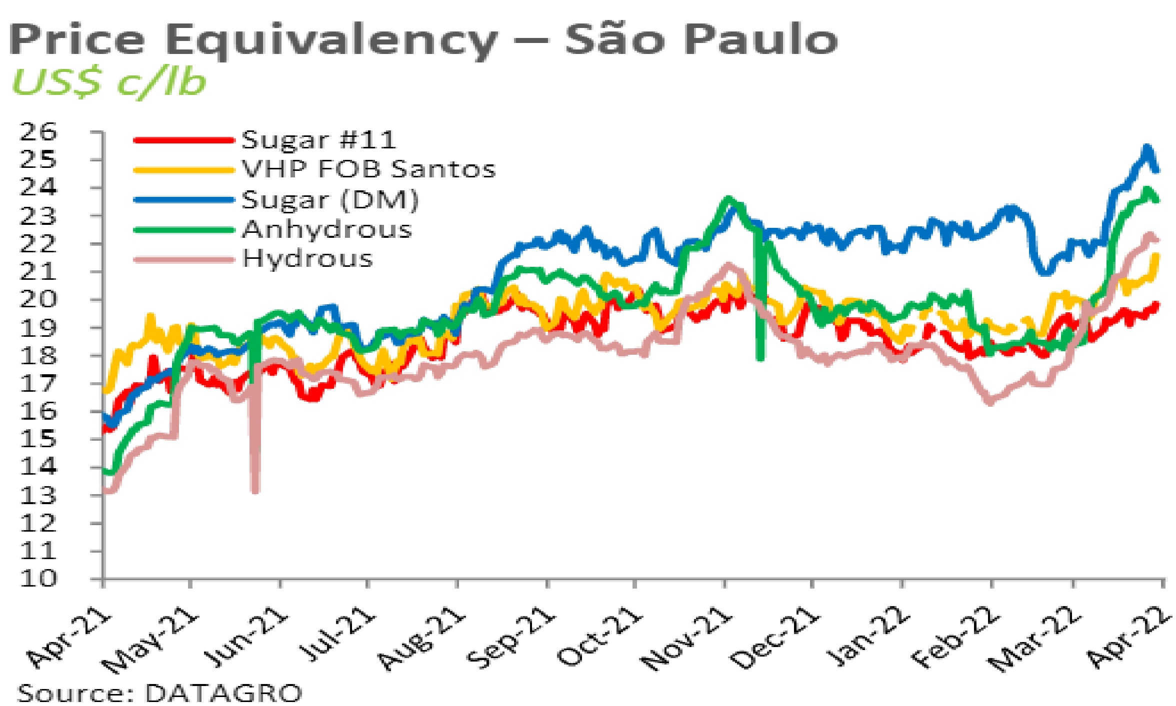
CONSECANA reports that the average sugarcane price (cumulative through February 2022) for the state of Sao Paulo for the 2021/22 crop was R$1.1931 per kilogram of TRS, or approximately R$170 per ton of sugarcane, an sharp increase of 55 percent compared to the same period for MY 2020/21 (R$0.7567 per kg of TRS, or approximately R$110 per ton of sugarcane) due to high prices of sugar and ethanol.

In February 2021, the Program for Continued Education in Economics and Business Management (PECEGE) connected to Escola Superior de Agricultura “Luiz de Queiroz” (ESALQ), reported that the price of total reducing sugar (TRS)/metric ton of sugarcane received by sugarcane growers in the State of Sao Paulo for MY 2022/23 is forecast at R$ 1.2817 per kilogram, a seven percent increase compared to the previous MY. PECEGE reports that expected inflated sugar and petroleum prices in the international market due to the Russia-Ukraine war should sustain high TRS prices.

The Crystal Sugar Price Index released by ESALQ is below. The Index tracks crystal sugar prices received by producers in the domestic spot market. Sugar prices remain firm in the domestic market following the steady prices in the international market (see the sugar #11 future price series graph as reported by ICE in the Sugar and Ethanol Production Mix section).

Crystal Sugar Price Index - Domestic Market (Real, 50kg/bag, Including Tax)					
Period	**2018**	**2019**	**2020**	**2021**	**2022**
January	60.88	68.81	74.33	106.31	151.45
February	53.23	68.32	78.35	107.70	144.78
March	51.32	67.91	78.45	107.58	137.60
April 1/	54.89	68.45	77.38	108.34	142.47
May	54.27	69.09	74.84	115.08	--
June	57.80	62.55	76.24	116.36	--
July	55.11	59.70	77.36	116.40	--
August	51.49	60.06	81.44	128.43	--
September	60.68	61.68	86.53	141.73	--
October	64.36	65.33	93.75	147.27	--
November	67.73	66.13	106.20	153.67	--
December	68.57	70.26	108.78	155.06	--
Source: USP/ESALQ/CEPEA. 1/ April 2022 refers to April 7.					

The sugar-ethanol price equivalency graph for the State of Sao Paulo, as reported by Datagro, follows. The April 13th shows that sugar contract #11 at ICE in New York was negotiated at 20.10 U.S. cents/lb. In contrast, very high polarity (VHP) sugar exported FOB from the Port of Santos and sugar sold on the domestic market were traded at approximately 24.77 and 21.26 U.S. cents/lb (FOB Santos), respectively. The ethanol price equivalence on the domestic market ranges between 24.06 and 24.10 cents/lb.



Exchange Rate

Exchange Rate (R$/US$1.00 - official rate, last day of period)							
Month	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
January	4.04	3.13	3.16	3.65	4.25	5.48	5.36
February	3.98	3.10	3.24	3.74	4.50	5.53	5.14
March	3.56	3.17	3.32	3.90	5.20	5.70	4.74
April 1/	3.45	3.20	3.48	3.94	5.43	5.40	4.74
May	3.60	3.26	3.74	3.94	5.43	5.23	
June	3.21	3.30	3.86	3.83	5.48	5.00	
July	3.24	3.13	3.75	3.76	5.20	5.12	
August	3.24	3.15	4.14	4.14	5.47	5.14	
September	3.25	3.17	4.00	4.16	5.64	5.44	
October	3.18	3.27	3.72	4.00	5.77	5.64	
November	3.40	3.26	3.86	4.22	5.33	5.62	
December	3.47	3.31	3.87	4.03	5.20	5.58	
Source: Brazilian Central Bank (BACEN) 1/ April 2022 refers to April 07.							

Consumption

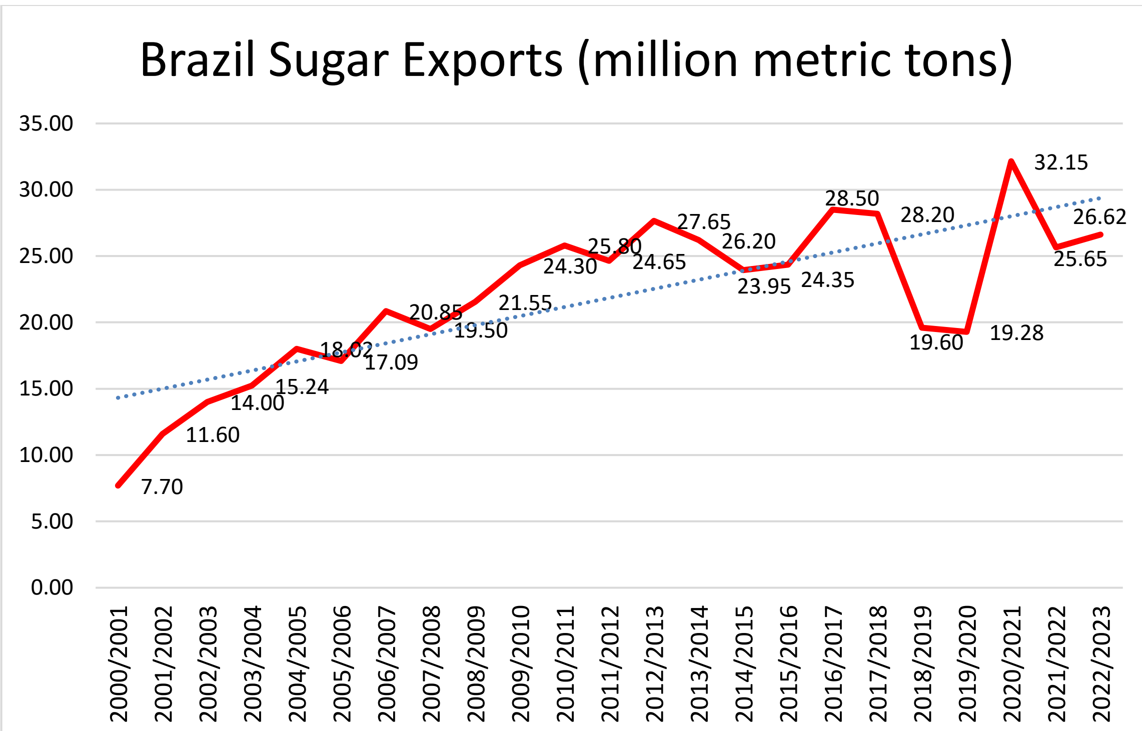
There is no official source for the domestic consumption of sugar in Brazil. ATO/Sao Paulo forecasts Brazilian sugar consumption for MY 2022/23 at 9.8 mmt, raw value, unchanged from the revised figure for MY 2021/22. Post contacts estimate that 45 percent of the total domestic consumption is for direct use, e.g, consumers purchasing sugar at the grocery store, whereas 55 percent is for indirect use, e.g., for industrial use. According to the Brazilian Institute of Geography and Statistics (IBGE), retail refined sugar prices in the domestic market increased 48 percent in 2021 compared to the previous year due to lower Brazilian sugar production and higher sugar demand worldwide.

Sugar consumption is correlated to some extent to the country's economic activity. Although IBGE estimates the Brazilian Gross Domestic Product (GDP) in 2021 at 4.6 percent, it only shows a recovery from the poor economic activity level in 2020 which decreased by 4.06 due to the COVID-19 pandemic. The Brazilian GDP for 2022 is forecast at a modest 0.5 through 1.1 percent due to the longstanding consequences of the COVID-19 pandemic and the volatile political climate as a result of the presidential elections in October 2022.

Exports

Brazil remains the largest sugar exporter worldwide with over 40 percent of total exports. Brazil is followed by Thailand, India, Australia and Mexico. ATO/Sao Paulo forecasts Brazil's sugar exports for MY 2022/23 at 26.62 mmt, raw value, an increase of 970,000 metric ton, raw value, from MY 2021/22 (25.65 mmt), due to the likely higher sugar exportable surplus compared to the previous season. Raw sugar exports will likely account for 24.7 mmt during MY2022/23, raw value, whereas the remainder represents exports of refined sugar.

Although the Brazilian currency has recently appreciated against the U.S. dollar (see Exchange Rate section), it remains significantly devaluated, sustaining the Brazilian product's high competitiveness in export markets. In addition, the world sugar market supply is likely to remain tight. Industry contacts report that the world sugar market should move from a roughly 1 mmt surplus in MY 2021/22 to a 2.5 to 3 mmt surplus in MY 2022/23 (MY October-September). The graph below illustrates Brazilian sugar exports since 2000 and the steady upward trend for exports.



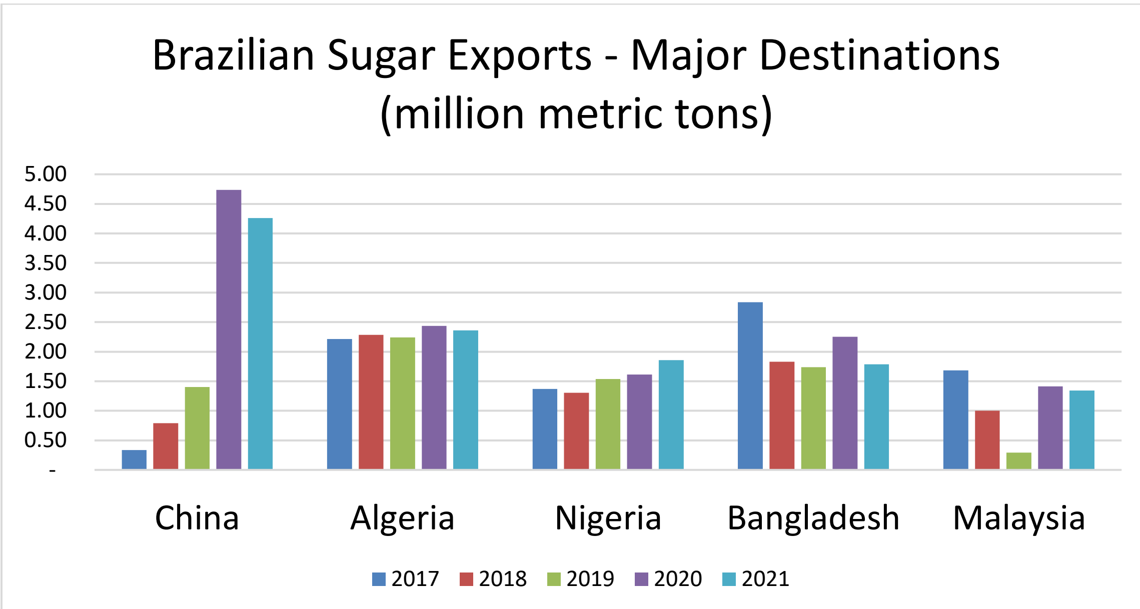
Source: USDA/ATO/Sao Paulo

The following tables show Brazilian sugar exports by destination for MY 2020/21 and 2021/22 (April-February) as reported by the Trade Data Monitor (TDM). According to TDM, cumulative exports from April 2021 to February 2022 are 24.54 mmt, tel quel.

Brazilian Sugar Exports (NCMs 1701.11, 1701.13 & 1701.14, MT, tel quel, US$ 000 FOB)				
Country	**MY 2020/21 1/**		**MY 2021/22 1/**	
Partner	**Value**	**Quantity**	**Value**	**Quantity**
China	1,301,792	4,761,111	1,390,681	4,130,591
Algeria	575,338	2,076,805	748,457	2,214,658
Nigeria	402,910	1,458,387	592,181	1,786,041
Bangladesh	588,759	2,087,011	411,300	1,238,636
Canada	251,234	926,561	416,306	1,176,342
Morocco	377,512	1,324,908	395,321	1,175,708
Malaysia	404,062	1,487,408	390,539	1,160,673
Saudi Arabia	331,470	1,205,211	354,380	1,070,698
Egypt	270,132	987,866	303,449	876,083
UAE	314,582	1,165,453	278,531	835,559
Others	2,476,830	8,693,163	2,136,673	6,068,574
Total	7,294,622	26,173,884	7,417,817	21,733,563
Source: Trade Data Monitor (TDM) based on the Brazilian Foreign Trade Secretariat (SECEX) Note: Numbers may not add due to rounding 1/ April - February				

Brazilian Sugar Exports (NCMs 1701.99.00, MT, tel quel, US$ 000 FOB)				
Country	**MY 2020/21 1/**		**MY 2021/22 1/**	
Partner	**Value**	**Quantity**	**Value**	**Quantity**
Ghana	84,529	262,304	116,414	334,645
Togo	69,024	210,716	106,260	286,478
Gambia	70,445	215,631	69,071	178,390
Angola	63,373	202,374	62,734	171,818
Benin	86,778	275,410	57,982	171,574
Cote d'Ivoire	43,861	128,996	60,362	171,566
Mauritania	78,857	232,576	65,020	163,109
Venezuela	99,609	223,018	100,253	163,098
Yemen	112,398	368,128	47,881	144,390
Guinea	57,114	173,445	47,873	133,234
Others	604,353	1,691,375	363,765	890,608
Total	1,370,342	3,983,973	1,097,615	2,808,910
Source: Trade Data Monitor (TDM) based on the Brazilian Foreign Trade Secretariat (SECEX) Note: Numbers may not add due to rounding 1/ April - February				

Major Brazilian sugar destinations include China, Algeria, Nigeria, Bangladesh and Malaysia. The graph below illustrates Brazilian sugar exports by major destination for calendar years 2017 through 2021, as reported by the Trade Data Monitor (TDM).



Source: TDM - Trade Data Monitor

Stocks

Post forecasts total sugar ending stocks for MY 2022/23 at 190,000 mt, a drop of 50,000 from the revised estimate for MY 2021/22 (240,000 mt). There is no official source for carry-over stocks of sugar in Brazil.

Policy

U.S. Sugar Tariff-Rate Quotas (TRQ)

Imports of sugar into the United States are governed by tariff-rate quotas (TRQ), which allow a certain quantity of sugar to enter the country under a low tariff. TRQs apply to imported raw cane sugar, refined sugar, sugar syrups, specialty sugars, and sugar-containing products. The sugar import program meets the U.S. commitments under the Uruguay Round Agreement on Agriculture.

USDA establishes the annual quota volumes for each federal fiscal year (beginning October 1), and the U.S. Trade Representative (USTR) allocates the TRQs among countries. Sugar and related products paying a higher, over-quota tariff may enter the country in unlimited quantities. About 40 countries worldwide receive TRQs allocations based on historical trade to the United States. The top three quota holding countries are the Dominican Republic, Brazil, and the Philippines.

On September 12, 2021, the U.S. government announced the establishment of the in-quota quantity for raw cane sugar for Fiscal Year (FY) 2022. As the second-largest recipient of the U.S. sugar tariff quota, Brazil held a raw value allocation of 152,691 metric tons. No additional allocation has been announced up to now. The table below shows the Brazilian U.S. sugar TRQ allocations (original and additional) for the past years.

US Raw Sugar Tarif-Rate Quota (TRQ) for Brazil (Metric Tons)			
Fiscal Year - FY	**Original TRQ Allocation**	**Additional TRQ Allocation**	**Total**
2012	155,634	81,136	236,770
2013	152,691	16,107	168,798
2014	152,691	15,251	167,942
2015	152,691	37,978	190,669
2016	152,691	33,865	186,556
2017	152,691	30,001	182,692
2018	152,691	30,000	182,691
2019	152,691	52,464	205,155
2020	152,691	158,203	310,894
2021	152,691	29,083	181,774
2022	152,691	---	152,691
Source: USTR			

Sugarcane and Sugar PSD Tables

Sugar Cane for Centrifugal	2020/2021		2021/2022		2022/2023	
Market Year Begins	Apr 2020		Apr 2021		Apr 2022	
Brazil	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	9900	9900	9800	9800	0	9650
Area Harvested (1000 HA)	9450	9450	9350	9350	0	9200
Production (1000 MT)	657000	657000	590000	576000	0	613000
Total Supply (1000 MT)	657000	657000	590000	576000	0	613000
Utilization for Sugar (1000 MT)	303205	303205	280250	259200	0	275850
Utilizatn for Alcohol (1000 MT)	353795	353795	309750	316800	0	337150
Total Utilization (1000 MT)	657000	657000	590000	576000	0	613000
(1000 HA) ,(1000 MT)						

Sugar, Centrifugal	2020/2021		2021/2022		2022/2023	
Market Year Begins	Apr 2020		Apr 2021		Apr 2022	
Brazil	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks (1000 MT)	590	590	340	340	0	240
Beet Sugar Production (1000 MT)	0	0	0	0	0	0
Cane Sugar Production (1000 MT)	42050	42050	36000	35350	0	36370
Total Sugar Production (1000 MT)	42050	42050	36000	35350	0	36370
Raw Imports (1000 MT)	0	0	0	0	0	0
Refined Imp.(Raw Val) (1000 MT)	0	0	0	0	0	0
Total Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	42640	42640	36340	35690	0	36610
Raw Exports (1000 MT)	25720	25720	20800	20520	0	21296
Refined Exp.(Raw Val) (1000 MT)	6430	6430	5200	5130	0	5324
Total Exports (1000 MT)	32150	32150	26000	25650	0	26620
Human Dom. Consumption (1000 MT)	10150	10150	10000	9800	0	9800
Other Disappearance (1000 MT)	0	0	0	0	0	0
Total Use (1000 MT)	10150	10150	10000	9800	0	9800
Ending Stocks (1000 MT)	340	340	340	240	0	190
Total Distribution (1000 MT)	42640	42640	36340	35690	0	36610
(1000 MT)						

Attachments:

No Attachments