

## MEMORANDUM

**TO:** SCP Clients

**FROM:** Andre Williamson & Alex Smith

**DATE:** May 12, 2020

**SUBJECT:** SCP trade 2<sup>nd</sup> quarter 2019/20

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### Summary

Through the second quarter of 2019/20, net imports of sugar in products continued to grow - up 29,485 strv, 5.8%, over net imports through the second quarter of 2018/19. Imports of sugar in SCPs are up 2.5%, 22,546 strv compared to 2018/19. Exports have decreased 1.7%, 6,939 strv.

A 5.8% increase in net imports for the year would be about 63,740 strv, which would contribute to flat domestic disappearance in USDA's normal sugar balance framework. For the first six months of 2019/20, the Sweetener Market Data report showed total deliveries up 2.9 percent, while the April WASDE report projects a 1,000 strv decrease compared to 2018/19.

### Exports

Exports of sugar in SCPs decreased through the second quarter, down 1.7% compared to the second quarter of 2018/19.

Exports of sugar in SCPs were up for Chapters 19 and 20. They were down in Chapters 17, 18, 21, and 22. Exports of sugar in SCP's in Chapter 17 were down 3.6% (3,369 strv) through the second quarter compared to 2018/19. Exports of 1704907000, SUGAR CONFECTIONERY, WITHOUT COCOA, NESOI, to Canada dropped 15.4%, 2,081 strv compared to the second quarter of 2018/19. Chapter 18 exports were down 3.3% compared to exports through the second quarter of 2018/19. Chapter 19 exports were up 0.5%, 615 strv, through the second quarter compared to 2018/19. Exports of sugar in SCPs in Chapter 20 increased 6.9% (566 strv). Exports of sugar in SCPs are down 2.3% for both Chapter 21 and Chapter 22 (1,455 and 463 strv, respectively).

Exports of sugar in SCPs to Canada decreased 0.7% (1,374 strv) through the second quarter. Exports to Mexico increased 9.7% (5,291 strv). Exports to the rest of the world (ROW) decreased 6.8% (10,856 strv).

Canada leads US export destinations of sugar in products, accounting for about 47.4% of sugar exports in SCPs through the second quarter of 2019/20. Mexico accounted for 15.1%. The rest of the world receives the balance, 37.5%.

### **Imports**

Total imports of sugar in SCPs continued to rise and are up 2.5% (22,546 strv) through second quarter of 2019/20.

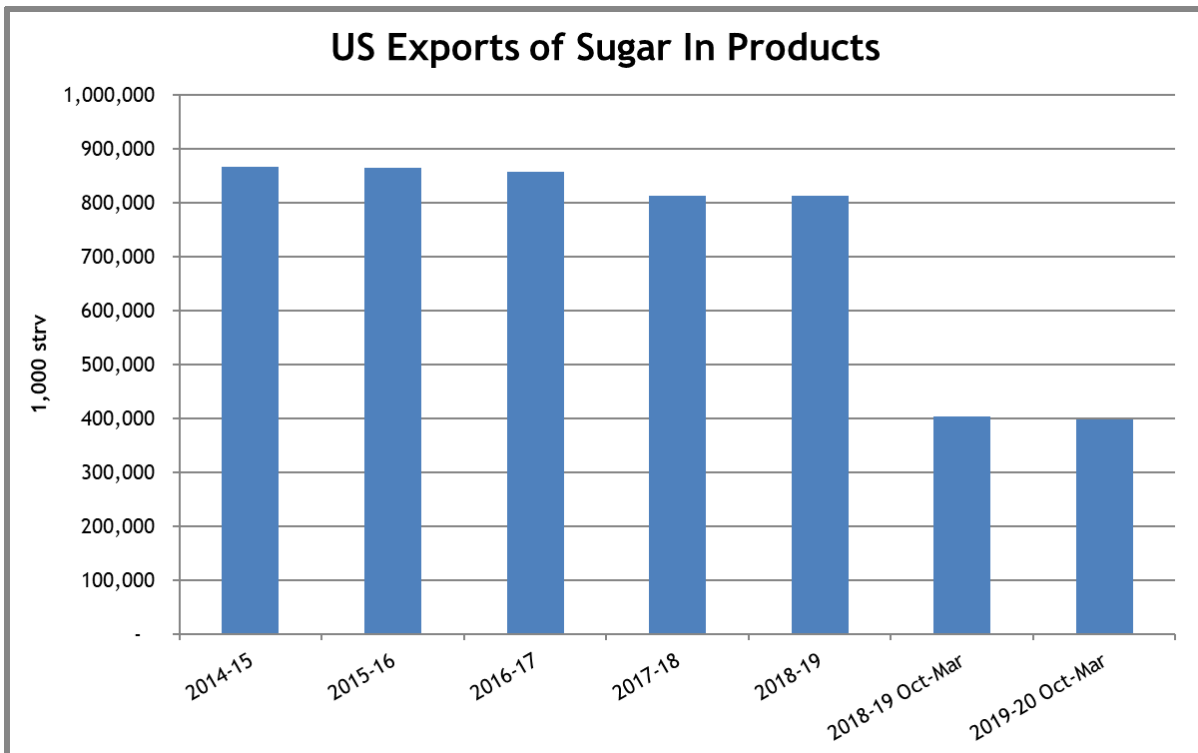
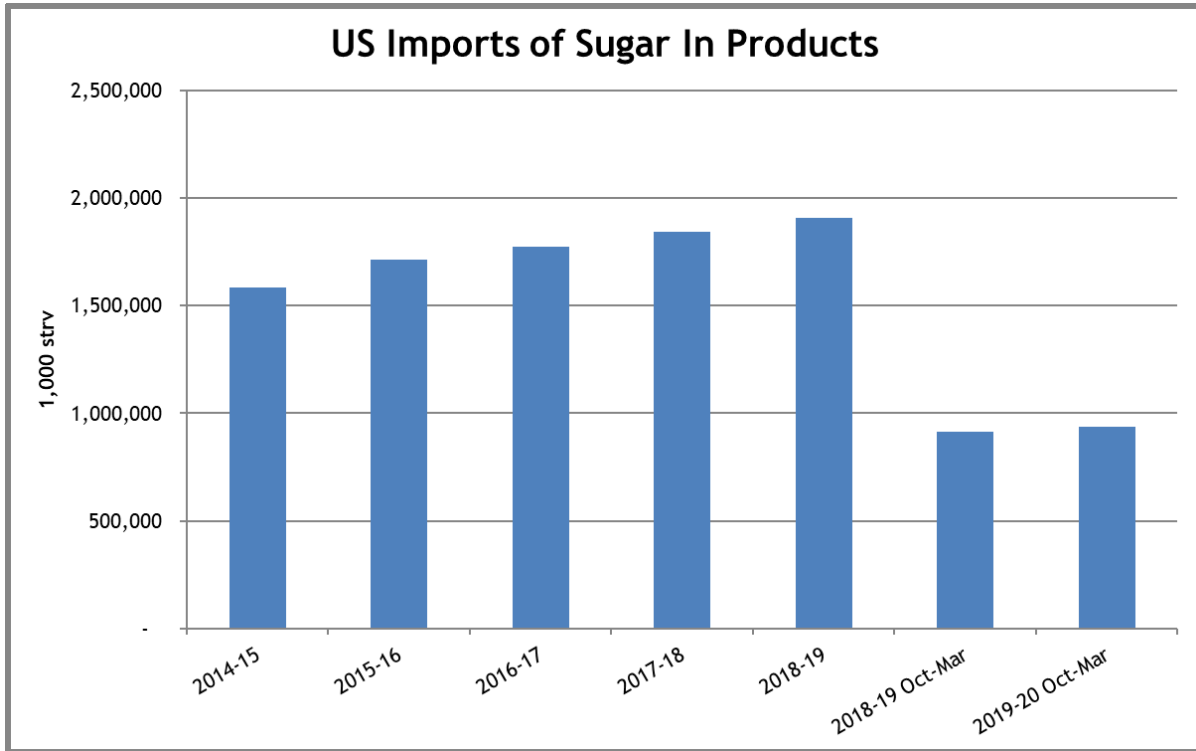
Imports of sugar increased in all categories except for Chapter 22. Imports of sugar in SCPs in Chapter 17 grew 3.3%, 9,080 strv, through the second quarter of 2019/20 compared to 2018/19. Imports of 1704903550, CONFECTIONS READY FOR CONSUMPTION, RETAIL SALE, OTHER, increased 6.4%, 11,819 strv, accounted for 88% of the increase of Chapter 17 imports. Chapter 18 imports increased 1.7%, 3,514 strv. Chapter 19 imports of sugar in SCPs increased 0.9%, 1,774 strv, through the second quarter of 2019/20. Imports in Chapter 20 were up 1.3%, or 448 strv. Chapter 21 imports grew 11.1%, 9,712 strv. The increase in Chapter 21 imports was driven by a 48 percent (6,526 strv) increase in imports of 2101205400, TEA/MATE PREPS, >10% SUGAR NOTE3-CH17, NOTE8-CH17. Imports in Chapter 22 were down 1.9%, 1,983 strv, compared to 2018/19.

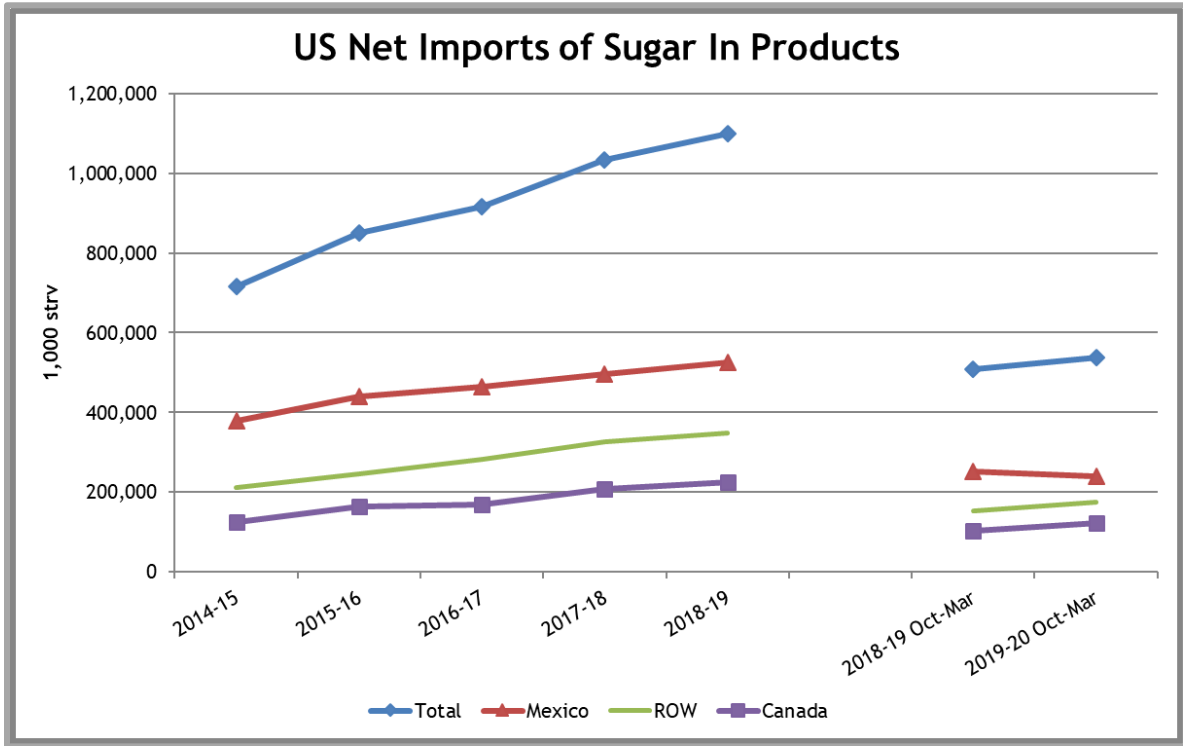
Imports of sugar in SCPs from Canada increased 6.3%, 18,424 strv, compared to 2018/19. Imports from Mexico were down 1.8% or 5,359 strv. Imports of sugar in SCPs from the ROW grew 3.0%, an increase of 9,481 strv.

### **Net imports**

Net imports of sugar in products through the second quarter of 2019/20 (year-to-date) totaled 538,332 strv, up 29,485 strv or 5.8% over 2018/19.

Net imports of sugar in SCPs from Canada through the second quarter of 2019/20 were up 19.2%, 19,797 strv compared to 2018/19. Net imports from Mexico were down 4.2% or 10,650 strv, and net imports of sugar in SCPs from the ROW are up 13.2%, 20,337 strv.





## 1: IMPORT TABLES

Summary of SCP Imports from All Countries								
		2014-15	2015-16	2016-17	2017-18	2018-19	Oct-Mar 2018-19	Oct-Mar 2019-20
<b>Product Imports</b>								
Chapter 17	MT	717,764	745,665	758,309	788,756	772,630	369,598	376,134
Chapter 18	MT	595,856	638,625	663,986	647,259	686,134	335,720	345,119
Chapter 19	MT	1,098,253	1,261,330	1,380,876	1,504,857	1,613,179	800,871	809,600
Chapter 20	MT	151,388	167,805	168,124	173,439	183,973	89,543	87,543
Chapter 21	MT	470,001	528,085	525,213	551,530	590,066	274,314	293,694
Chapter 22	MT	1,715,354	1,864,325	1,983,239	2,022,041	1,990,722	912,270	894,847
Total	MT	4,748,616	5,205,835	5,479,747	5,687,882	5,836,704	2,782,315	2,806,936
<b>Refined Sugar Content</b>								
Chapter 17	MT	435,508	456,047	465,532	492,577	492,670	236,081	243,776
Chapter 18	MT	316,289	338,821	350,099	340,007	362,576	178,309	181,287
Chapter 19	MT	216,530	254,180	282,634	312,368	338,898	166,936	168,440
Chapter 20	MT	50,601	55,561	56,438	59,042	62,865	30,140	30,519
Chapter 21	MT	156,969	168,515	157,219	164,582	170,356	74,274	82,505
Chapter 22	MT	165,415	179,781	191,248	194,989	191,969	87,972	86,292
Total	MT	1,341,312	1,452,905	1,503,169	1,563,565	1,619,334	773,712	792,819
<b>Raw Sugar Equivalent</b>								
Chapter 17	ST	513,899	538,135	549,328	581,241	581,351	278,576	287,656
Chapter 18	ST	373,221	399,808	413,116	401,209	427,839	210,405	213,919
Chapter 19	ST	255,505	299,932	333,508	368,594	399,900	196,984	198,759
Chapter 20	ST	59,709	65,562	66,596	69,669	74,180	35,565	36,013
Chapter 21	ST	185,223	198,848	185,518	194,207	201,020	87,643	97,356
Chapter 22	ST	195,190	212,141	225,672	230,088	226,524	103,807	101,824
Total	ST	1,582,748	1,714,427	1,773,739	1,845,007	1,910,814	912,980	935,526
Canada	ST	549,004	575,221	576,653	597,099	610,717	292,813	311,237
Mexico	ST	500,065	565,864	587,442	605,662	636,712	306,023	300,665
Other	ST	533,678	573,342	609,644	642,246	663,385	314,143	323,624

Summary of SCP Imports from Canada								
		2014-15	2015-16	2016-17	2017-18	2018-19	Oct-Mar 2018-19	Oct-Mar 2019-20
<b>Product Imports</b>								
Chapter 17	MT	153,497	146,355	146,868	150,114	133,801	64,445	66,910
Chapter 18	MT	316,869	342,213	352,287	348,216	360,587	178,414	189,259
Chapter 19	MT	622,629	675,292	711,266	746,402	802,622	408,660	402,084
Chapter 20	MT	18,410	23,327	22,527	22,806	25,682	13,414	10,671
Chapter 21	MT	170,630	184,417	170,784	183,395	187,160	85,233	96,081
Chapter 22	MT	110,148	122,870	138,758	189,703	223,444	93,489	123,953
<b>Total</b>	<b>MT</b>	<b>1,392,183</b>	<b>1,494,474</b>	<b>1,542,489</b>	<b>1,640,636</b>	<b>1,733,295</b>	<b>843,654</b>	<b>888,958</b>
<b>Refined Sugar Content</b>								
Chapter 17	MT	93,715	89,062	89,350	91,896	81,204	39,263	41,455
Chapter 18	MT	154,387	166,433	171,023	169,890	176,118	87,744	92,949
Chapter 19	MT	105,240	112,822	119,984	126,329	139,181	70,305	69,830
Chapter 20	MT	4,796	5,446	5,219	5,616	6,098	3,097	3,002
Chapter 21	MT	96,499	101,864	89,732	93,992	93,408	38,724	44,571
Chapter 22	MT	10,622	11,849	13,381	18,293	21,547	9,015	11,953
<b>Total</b>	<b>MT</b>	<b>465,258</b>	<b>487,476</b>	<b>488,689</b>	<b>506,016</b>	<b>517,556</b>	<b>248,147</b>	<b>263,760</b>
<b>Raw Sugar Equivalent</b>								
Chapter 17	ST	110,583	105,094	105,433	108,437	95,821	46,330	48,917
Chapter 18	ST	182,176	196,391	201,808	200,470	207,819	103,538	109,680
Chapter 19	ST	124,183	133,130	141,581	149,068	164,234	82,959	82,400
Chapter 20	ST	5,660	6,426	6,159	6,627	7,195	3,654	3,542
Chapter 21	ST	113,868	120,199	105,884	110,911	110,222	45,695	52,594
Chapter 22	ST	12,534	13,981	15,789	21,586	25,426	10,638	14,105
<b>Total</b>	<b>ST</b>	<b>549,004</b>	<b>575,221</b>	<b>576,653</b>	<b>597,099</b>	<b>610,717</b>	<b>292,813</b>	<b>311,237</b>

Summary of SCP Imports from Mexico								
		2014-15	2015-16	2016-17	2017-18	2018-19	Oct-Mar 2018-19	Oct-Mar 2019-20
<b>Product Imports</b>								
Chapter 17	MT	267,998	293,833	300,818	321,427	326,154	152,884	142,658
Chapter 18	MT	177,980	194,245	196,293	174,682	196,872	94,238	92,503
Chapter 19	MT	257,011	345,080	402,533	466,590	495,250	243,440	247,967
Chapter 20	MT	28,877	26,959	21,616	24,016	25,583	12,447	11,838
Chapter 21	MT	91,839	106,125	114,036	122,041	129,562	55,968	59,196
Chapter 22	MT	441,910	463,616	504,946	441,198	443,099	217,728	224,429
Total	MT	1,265,615	1,429,858	1,540,243	1,549,954	1,616,520	776,705	778,591
<b>Refined Sugar Content</b>								
Chapter 17	MT	178,805	194,806	193,545	209,155	213,665	101,251	97,390
Chapter 18	MT	114,763	124,844	125,719	112,439	126,216	61,050	58,594
Chapter 19	MT	65,806	91,782	107,825	125,582	134,511	66,129	66,995
Chapter 20	MT	8,731	8,299	6,694	7,463	7,916	3,832	3,612
Chapter 21	MT	13,065	15,108	15,357	16,088	14,549	6,084	6,567
Chapter 22	MT	42,614	44,707	48,693	42,546	42,729	20,996	21,642
Total	MT	423,784	479,545	497,832	513,273	539,586	259,342	254,801
<b>Raw Sugar Equivalent</b>								
Chapter 17	ST	210,990	229,871	228,383	246,803	252,125	119,476	114,920
Chapter 18	ST	135,421	147,316	148,348	132,678	148,935	72,039	69,141
Chapter 19	ST	77,651	108,302	127,233	148,186	158,723	78,032	79,054
Chapter 20	ST	10,302	9,793	7,899	8,806	9,341	4,521	4,262
Chapter 21	ST	15,417	17,827	18,121	18,984	17,168	7,179	7,749
Chapter 22	ST	50,285	52,755	57,458	50,204	50,420	24,775	25,538
Total	ST	500,065	565,864	587,442	605,662	636,712	306,023	300,665

**2: EXPORT TABLES**

Summary of SCP Exports to All Countries								
		2014-15	2015-16	2016-17	2017-18	2018-19	Oct-Mar 2018-19	Oct-Mar 2019-20
<b>Product Exports</b>								
Chapter 17	MT	264,594	280,097	275,364	257,107	245,782	122,993	119,902
Chapter 18	MT	315,609	299,979	312,531	308,453	304,002	152,624	147,470
Chapter 19	MT	1,025,843	997,984	966,626	936,150	965,645	486,438	488,037
Chapter 20	MT	73,735	115,551	98,468	92,014	85,503	42,836	44,701
Chapter 21	MT	689,078	709,713	706,756	687,531	706,292	344,077	338,590
Chapter 22	MT	1,009,765	923,138	825,671	730,281	734,355	350,243	342,098
Total	MT	3,378,624	3,326,462	3,185,416	3,011,536	3,041,579	1,499,211	1,480,798
<b>Refined Sugar Content</b>								
Chapter 17	MT	166,940	174,666	171,848	163,119	155,953	78,254	75,399
Chapter 18	MT	150,455	143,291	149,900	147,768	146,526	73,474	71,073
Chapter 19	MT	240,657	231,223	224,116	214,720	221,697	112,468	112,989
Chapter 20	MT	15,176	19,524	15,680	14,594	14,047	6,976	7,455
Chapter 21	MT	112,402	119,934	124,752	113,010	114,379	54,428	53,195
Chapter 22	MT	48,687	44,510	39,811	35,211	35,408	16,887	16,495
Total	MT	734,316	733,148	726,105	688,422	688,009	342,486	336,605
<b>Raw Sugar Equivalent</b>								
Chapter 17	ST	196,989	206,105	202,780	192,480	184,024	92,340	88,970
Chapter 18	ST	177,537	169,084	176,882	174,366	172,901	86,699	83,866
Chapter 19	ST	283,975	272,843	264,456	253,370	261,602	132,712	133,327
Chapter 20	ST	17,908	23,039	18,502	17,221	16,576	8,231	8,797
Chapter 21	ST	132,635	141,522	147,207	133,352	134,967	64,225	62,770
Chapter 22	ST	57,450	52,522	46,976	41,549	41,781	19,927	19,464
Total	ST	866,493	865,115	856,804	812,338	811,851	404,134	397,194
Canada	ST	423,504	412,037	406,630	388,762	385,163	189,651	188,278
Mexico	ST	120,863	125,750	123,427	108,393	111,325	54,514	59,805
Other	ST	322,126	327,328	326,747	315,183	315,363	159,969	149,112



Summary of SCP Exports to Canada								
		2014-15	2015-16	2016-17	2017-18	2018-19	Oct-Mar 2018-19	Oct-Mar 2019-20
<b>Product Exports</b>								
Chapter 17	MT	103,278	105,725	110,728	110,469	102,532	51,103	47,332
Chapter 18	MT	140,655	136,982	146,424	138,937	133,401	64,820	69,323
Chapter 19	MT	606,938	593,496	579,796	559,440	584,656	298,434	292,402
Chapter 20	MT	44,575	55,923	48,709	46,405	44,802	21,860	24,140
Chapter 21	MT	277,217	275,327	263,153	254,459	243,564	121,343	115,978
Chapter 22	MT	683,108	632,968	557,365	466,373	445,740	204,109	199,059
<b>Total</b>	<b>MT</b>	<b>1,855,771</b>	<b>1,800,421</b>	<b>1,706,175</b>	<b>1,576,084</b>	<b>1,554,695</b>	<b>761,669</b>	<b>748,234</b>
<b>Refined Sugar Content</b>								
Chapter 17	MT	69,418	70,063	72,678	72,879	67,581	33,801	30,988
Chapter 18	MT	67,581	65,901	70,717	66,907	64,910	31,530	33,704
Chapter 19	MT	138,787	132,991	129,199	122,509	127,475	65,354	64,885
Chapter 20	MT	9,474	10,250	8,687	8,366	8,102	4,012	4,408
Chapter 21	MT	40,706	39,459	36,446	36,312	36,849	16,183	15,974
Chapter 22	MT	32,937	30,519	26,874	22,487	21,492	9,841	9,598
<b>Total</b>	<b>MT</b>	<b>358,902</b>	<b>349,184</b>	<b>344,602</b>	<b>329,460</b>	<b>326,409</b>	<b>160,721</b>	<b>159,557</b>
<b>Raw Sugar Equivalent</b>								
Chapter 17	ST	81,914	82,675	85,760	85,997	79,745	39,885	36,566
Chapter 18	ST	79,745	77,764	83,446	78,950	76,594	37,205	39,771
Chapter 19	ST	163,769	156,930	152,455	144,561	150,421	77,118	76,564
Chapter 20	ST	11,179	12,095	10,250	9,872	9,561	4,734	5,201
Chapter 21	ST	48,033	46,561	43,007	42,848	43,482	19,096	18,850
Chapter 22	ST	38,865	36,013	31,711	26,534	25,360	11,613	11,325
<b>Total</b>	<b>ST</b>	<b>423,504</b>	<b>412,037</b>	<b>406,630</b>	<b>388,762</b>	<b>385,163</b>	<b>189,651</b>	<b>188,278</b>

Summary of SCP Exports to Mexico								
		2014-15	2015-16	2016-17	2017-18	2018-19	Oct-Mar 2018-19	Oct-Mar 2019-20
<b>Product Exports</b>								
Chapter 17	MT	55,725	69,019	71,461	43,752	39,717	17,988	24,162
Chapter 18	MT	50,632	47,377	46,334	47,435	47,685	24,918	24,287
Chapter 19	MT	127,310	117,786	109,887	112,783	119,692	58,905	63,653
Chapter 20	MT	1,934	5,096	4,050	3,396	4,875	1,935	4,186
Chapter 21	MT	96,543	99,537	101,433	98,340	107,282	49,633	52,476
Chapter 22	MT	59,898	46,996	36,415	36,755	49,690	27,250	24,917
<b>Total</b>	<b>MT</b>	<b>392,042</b>	<b>385,811</b>	<b>369,580</b>	<b>342,460</b>	<b>368,941</b>	<b>180,629</b>	<b>193,682</b>
<b>Refined Sugar Content</b>								
Chapter 17	MT	30,621	38,505	39,139	25,109	23,251	10,797	13,731
Chapter 18	MT	24,427	22,834	22,376	22,915	23,002	12,010	11,738
Chapter 19	MT	30,043	28,334	26,775	28,325	30,518	15,438	16,068
Chapter 20	MT	443	740	627	555	867	326	651
Chapter 21	MT	14,005	13,889	13,927	13,182	14,310	6,313	7,292
Chapter 22	MT	2,888	2,266	1,756	1,772	2,396	1,314	1,201
<b>Total</b>	<b>MT</b>	<b>102,427</b>	<b>106,568</b>	<b>104,599</b>	<b>91,858</b>	<b>94,343</b>	<b>46,198</b>	<b>50,682</b>
<b>Raw Sugar Equivalent</b>								
Chapter 17	ST	36,133	45,435	46,184	29,629	27,436	12,740	16,202
Chapter 18	ST	28,823	26,944	26,404	27,040	27,142	14,172	13,851
Chapter 19	ST	35,451	33,435	31,594	33,423	36,011	18,217	18,961
Chapter 20	ST	523	873	740	655	1,024	384	769
Chapter 21	ST	16,526	16,389	16,434	15,555	16,885	7,450	8,605
Chapter 22	ST	3,408	2,674	2,072	2,091	2,827	1,550	1,418
<b>Total</b>	<b>ST</b>	<b>120,863</b>	<b>125,750</b>	<b>123,427</b>	<b>108,393</b>	<b>111,325</b>	<b>54,514</b>	<b>59,805</b>