

US cash sugar: Bookings surge; supplies tighten

The sugar market was in a bullish mode after the recent International Sweetener Colloquium. Contracting for 2023-24 was active if not frenzied after traders returned to their offices. Adding to the bullish tone was lower 2022-23 sugar supplies and higher deliveries from February forecast by the US Department of Agriculture in its March 8 World Agricultural Supply and Demand Estimates report.

As expected, many sugar buyers and sellers returned from the Colloquium ready to wrap up all or a significant portion of their 2023-24 business. While a few, including some large buyers, continued to balk at pricing, which was up about 10¢ a lb, or 25%, from what most sugar was contracted at in 2022-23, most were willing to lock in supplies that have become increasingly uncertain in the past couple of years.

Indications were sales of beet sugar rose to at least 50% of prospective 2023-24 production, with some expected to approach 75% in the next couple weeks. At least one processor briefly stepped away from sales to assess its current solid position but was expected to resume activity in a few days. Others said they may do the same in a week or so once the current load of pricing requests have cleared.

Pricing was firm. While most processors have held prices at pre-Colloquium levels, some were considering price increases as their percentage of sales increases. Some also are expected to step out of the market (at a lower percentage of prospective production sold) sooner than in past years due to supply uncertainty, which has been marked by four force majeure by beet processors since the fall of 2019. Some processors also were quoting in a wider price range, including prices well above quoted values, for buyers who insisted in having an immediate price quote.

Beet sugar prices for 2023-24 ranged from a low of about \$2.50¢ a lb to more than \$5¢ a lb for an immediate quote.

Cane sugar was offered from 57¢ to \$7.50¢ a lb to lb. Northeast and West Coast for calendar 2024. Pricing in the Gulf and Southeast ranged from 54¢ a lb to 56¢ a lb to lb, depending on refiner and delivery period.

Spot sugar still was at 62¢ a lb to lb, for cane nominally at 60¢ a lb to lb, for beet. Some processors indicated slower-than-expected draw against contracted sugar was making a bit more spot supply available, but it still was limited.

Adding fuel to the 2023-24 sugar contracting frenzy was today's WASDE report from the USDA, with revised 2022-23 forecasts. Some beet processors again were surprised by the USDA's higher beet sugar forecast based on strong sucrose recovery rates. The slightly higher cane sugar forecast was more palatable. If realized, both cane sugar and total sugar production would be record high and beet sugar would be the second highest on record after 2017-18.

US 2022-23 imports also were forecast lower mainly due to a 171,000-ton drop in shipments from Mexico due to a sharply lower production forecast, which was anticipated. The USDA forecast Mexico's 2022-23 sugar production at 5,485,000 tonnes, actual weight, down 415,000 tonnes from February due to a slow start to the cane harvest season, lower cane yields and lower sucrose recovery rates. The production forecast came in at the low end of forecasts made at the Colloquium that ranged from 5.5 million to about 5.8 million tonnes, although one forecast from the USDA's recent Agricultural Outlook Forum was at 5.3 million tonnes.

Yet another surprise to some was the WASDE's 100,000-ton increase in 2022-23 sugar deliveries for human consumption based on the strong pace of deliveries through January. As noted, some beet processors have noted slower-than-expected deliveries early this year.

Forecasts, supply and demand have combined to make a lively sugar market, with sales for next year expected to be wrapped up at a record early date due mainly to supply concerns.

US bulk refined beet & cane sugar prices

F.o.b. plant, cents per lb.	2022-23 March 8	- Change from - 1 week	1 year
Midwest beet	60.00N	--	+16 to +18
Pacific beet	60.00N	--	+16 to +18
Pacific cane	62.00*	--	+10
Northeast cane	62.00*	--	+10
South/S.E. cane	62.00*	--	+11 to +16
Gulf cane	62.00*	--	+11 to +16

*Spot, N-nominal.

US bulk refined beet & cane sugar prices

F.o.b. plant, cents per lb.	2022-24 March 8	- Change from - 1 week	2022-23
Midwest beet	\$2.50 +	NA	NA
Pacific beet	\$3.00 +	NA	NA
Pacific cane	\$7 to \$7.50*	NA	NA
Northeast cane	\$7 to \$7.50*	NA	NA
South/S.E. cane	\$4 to \$6*	NA	NA
Gulf cane	\$5 to \$6*	NA	NA

*Calendar 2024; #Some 2023-24, some calendar 2024

#16 Domestic raw sugar futures

Cents per lb.	March 8	- Change from - 1 week	2 weeks	1 year
May	38.00	0.76	0.80	1.45
July	38.10	1.00	1.10	1.50
September	38.00	0.90	1.75	1.50
November	37.00	0.46	0.75	1.15
January 2024	36.80	0.81	0.80	2.80
March	36.80	0.81	0.80	2.80
May	36.80	0.81	0.80	2.80

#11 World raw sugar futures

Cents per lb.	March 8	- Change from - 1 week	2 weeks	1 year
May	20.88	0.31	0.76	1.94
July	20.31	0.29	1.02	1.39
October	20.06	0.19	1.01	0.99
March 2024	20.13	0.16	1.01	0.84
May	19.10	0.21	1.01	0.64
July	18.33	0.23	0.93	0.41
October	17.87	0.19	0.81	0.29

production in Europe. Limiting gains were ideas that speculative funds may limit further buying. Also on the horizon was the prospect of a large Brazilian crop in the season beginning April 1. Cane production is forecast higher, while mills also are expected to channel a higher percentage of the crush to sugar than a year ago. Prices were up about 0.75¢ to 1.00¢ a lb from five weeks ago and were up about 0.30¢ to 1.94¢ a lb from a year ago.

Speculative funds reduced their net long position in ICE Futures US world raw sugar futures and options by 13,325 lots during the week ended Feb. 7, dropping the total net long to 158,046 lots, the Commodity Futures Trading Commission said.

Sugar futures: Domestic raws surge to highest since 2011

No. 16 domestic raw sugar futures were 0.46¢ to 1.00¢ a lb higher from a week ago with the spot contract touching a 12-year high amid active trading on March 7. The high prices and volume were said to be related to buyers looking in 2023-24 sugar coverage at a rapid pace. Prices were up 0.75¢ to 1.75¢ a lb from five weeks ago and were up 1.15¢ to 2.80¢ a lb from a year ago.

World raw sugar futures prices posted modest gains of about 0.15¢ to 0.30¢ a lb from a week ago after recently hitting six-year highs. Support continued to be derived from tight nearby supplies, mostly the result of lower-than-expected production and exports by India. Some added support came from early closing of some mills in Thailand and dim prospects for 2023 sugar beet

Sugar And Sweetener Report

TD Snyder



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