

The DYERGRAM



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April 2025

■ **SUGAR SPOTS...**

The Southern Minnesota Beet Sugar Cooperative (SMBSC) said it will be decommissioning of its Brawley, Calif., sugar beet facility that operates under its subsidiary, Spreckels Sugar Co., Inc. It is the last sugar beet processing plant in California.

■ **WASDE... APRIL 2025 WASDE REPORT**

SUGAR: U.S. sugar supply for fiscal year (FY) 2024/25 is increased by 143,758 short tons, raw value (STRV) to 14.461 million on increases in high-tier tariff imports and beginning stocks more than offsetting a decrease in sugar production. Raw high-tier tariff imports entering the United States from October 1 through the first week of April totaled 261,758 STRV, an increase of 88,070 over the previous month. Refined high-tier tariff imports totaled 237,104 STRV over the same period for a monthly average of 39,517 STRV. A decrease in the pace is posited as more likely than an increase or unchanged due to historically high current levels of refined beet and cane sugar that could increase competition for refined high-tier from the domestically produced product. Monthly entries for the remaining 6 months of the fiscal year are projected, therefore, at 75 percent of the first six-month average, implying total high-tier refined at 414,931 STRV. Molasses imported as an input in sugar refining is unchanged at a sugar-equivalence of 54,645 STRV. Sugar production is decreased 39,316 STRV, mostly on lower cane sugar production in Florida from lower sugarcane yields reported by processors. With no changes for sugar use, ending stocks are projected up by the supply increase to 2.016 million STRV for an ending stocks-to-use ratio of 16.20 percent.

The sugar balance in Mexico is unchanged from last month.

R. Markey & Sons, Inc.
Monthly Arrivals Report - Bulk Sugar
April 2025

Bulk Arrivals Schedule

USA - Baltimore, MD

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/7/2025	4/8/2025	CENTURY MELODY	10,826	WTO TRQ	Dominican Republic	CAEI	2024/25
4/27/2025	TBD	DIONI GR	9,079	WTO TRQ	Panama	CSC	2024/25
4/27/2025	TBD	DIONI GR	9,079	WTO TRQ	Panama	CSC	2024/25
4/27/2025	TBD	DIONI GR	9,079	WTO TRQ	Panama	CSC	2024/25
4/27/2025	4/28/2025	KNOT REFINED	7,098	Domestic	USA-Florida	FSMEI	2024/25

Port Total **45,161**

USA - Yonkers, NY

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/6/2025	4/9/2025	SUGAR EXPRESS	13,124	Domestic	USA-Florida	FSMEI	2024/25
4/16/2025	4/16/2025	BALSA 91	6,889	WTO TRQ	Dominican Republic	CAEI	2024/25
4/19/2025	4/23/2025	KNOT REFINED	9,866	Domestic	USA-Florida	FSMEI	2024/25
4/30/2025	TBD	SUGAR EXPRESS	13,124	Domestic	USA-Florida	FSMEI	2024/25

Port Total **43,003**

USA - Chalmette, LA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/1/2025	4/30/2025	LOUISIANA BARGES	32,500	Domestic	USA-Louisiana	PATOUT	2024/25

Port Total **32,500**

USA - New Orleans, LA

-No Bulk Shipment Arrivals-

USA - Crockett, CA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/13/2025	4/14/2025	SEATTLE HARMONY	35,431	2nd Tier Duty	El Salvador	CSC	2024/25
4/25/2025	4/28/2025	T CLEVER	30,510	USMCA	Mexico	CSC	2024/25

Port Total **65,941**

USA - Fairless Hills, PA

-No Bulk Shipment Arrivals-

USA - Savannah, GA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/1/2025	4/1/2025	CENTURY BRIGHT	13,778	USMCA	Mexico	Sucro Sourcing	2024/25
4/5/2025	4/7/2025	BALSA 96	6,227	USMCA	Mexico	Sucro Sourcing	2024/25
4/9/2025	4/14/2025	BARGE MONTVILLE	12,857	Domestic	USA-Florida	FSMEI	2024/25
4/21/2025	4/22/2025	BALSA 93	5,167	WTO TRQ	Panama	Aljane	2024/25
4/25/2025	4/25/2025	BARGE MONTVILLE	12,857	Domestic	USA-Florida	FSMEI	2024/25
4/30/2025	TBD	CENTURY EMERALD	14,960	2nd Tier Duty	Belize	Czarnikow	2024/25

Port Total **65,846**

USA - Wilmington, DE

-No Bulk Shipment Arrivals-

USA - Ponce, PR

-No Bulk Shipment Arrivals-

USA - Buffalo, NY

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/13/2025	4/13/2025	FEDERAL HUDSON*	9,842	USMCA	Mexico	Sucro Sourcing	2024/25

Port Total **9,842**

USA - Detroit, MI

-No Bulk Shipment Arrivals-

USA - Brownsville, TX

-No Bulk Shipment Arrivals-

R. Markey & Sons, Inc.
Monthly Arrivals Report - Bulk Sugar
April 2025

USA - Houston, TX

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/5/2025	4/5/2025	LOCH LOMOND	14,830	Refined	Brazil	Wholesome Sweeteners	2024/25
Port Total			14,830				

USA - Port Manatee, FL

-No Bulk Shipment Arrivals-							
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USA - Toledo, OH

-No Bulk Shipment Arrivals-							
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USA - Sacramento, CA

-No Bulk Shipment Arrivals-							
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USA - San Diego, CA

-No Bulk Shipment Arrivals-							
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USA - Stockon, CA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
4/5/2025	4/5/2025	FEDERAL BARENTS	8,967	Refined	Argentina	PCC	2024/25
4/5/2025	4/5/2025	FEDERAL BARENTS	9,615	Bond	Argentina	PCC	2024/25
Port Total			18,582				

USA - Chicago, IL

-No Bulk Shipment Arrivals-							
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USA - Jacksonville, FL

-No Bulk Shipment Arrivals-							
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USA - Olympia, WA

-No Bulk Shipment Arrivals-							
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USA - San Juan, PR

-No Bulk Shipment Arrivals-							
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USA - San Diego, CA.

-No Bulk Shipment Arrivals-							
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GRAND TOTAL: 295,705 Long Tons

Notes:
* Details not confirmed by the Importer. Based on publicly available data.

R. Markey & Sons, Inc.
Monthly Arrivals Report - Bulk Sugar
April 2025

Year-on-Year Comparison By Quota Classification

Quota Period: October 1, 2023 to September 30, 2024

Year	2nd Tier	Bond	CAFTA	Domestic	FTA	ReExport	Refined	USMCA	WTO TRQ	Total
Oct 23	9,793			66,996		6,988	42,957		25,826	152,560
Nov 23	32,479			74,910					116,141	223,530
Dec 23	36,169	77,935		60,995		12,795	14,826	21,652	83,448	307,820
Jan 24	97,879		21,184	47,975			9,885	57,213	29,222	263,358
Feb 24	80,165		5,264	67,618		10,991		66,077	65,294	295,409
Mar 24	4,921	29,526	7,086	86,933		25,579		109,827	79,309	343,181
Apr 24	34,447			98,112		43,014	23,657		58,874	258,104
Total	295,853	107,461	33,534	503,539		99,367	91,325	254,769	458,114	1,843,962

Quota Period: October 1, 2024 to September 30, 2025

Year	2nd Tier	Bond	CAFTA	Domestic	FTA	ReExport	Refined	USMCA	WTO TRQ	Total
Oct 24				91,200		29,570				120,770
Nov 24	18,168			60,128		6,966			151,441	236,703
Dec 24	75,699			69,307		10,417	14,574		117,836	287,833
Jan 25	61		23,335	83,927		27,469	14,825	38,334	97,719	285,670
Feb 25	4,345		28,846	71,619		11,211		30,806	52,179	199,006
Mar 25	24,672		23,554	58,065		20,785		31,707	54,998	213,781
Apr 25	50,391	9,615		101,426			23,797	60,357	50,119	295,705
Total	173,336	9,615	75,735	535,672		106,418	53,196	161,204	524,292	1,639,468