

The DYERGRAM



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June 2026

■ **SUGAR SPOTS...**

Ingredion acquired U.K. ingredient solutions firm Tate & Lyle for \$3.6B in cash, creating a leading specialty F&B ingredients company. The deal reflects how food companies are reshaping portfolios to tap demand for low-sugar, high-protein, and functional products.

Once the world's largest sugar exporter, India is expected to halt exports for at least three more seasons due to El Niño weather conditions. Rising ethanol demand has squeezed the nation's supply as well.

■ **WASDE... JUNE 2026 WASDE REPORT**

SUGAR: Beet sugar production for 2026/27 is projected at 4.939 million short tons, raw value (STRV), an increase of 217,100 over last month. Area harvested at 1.038 million acres is unchanged from last month, but national yield is increased to 31.94 tons/acre, up from 30.21 tons last month, on the basis of more area planted before mid-May than projected last month. Based on processors' estimates, sugar from desugared molasses is projected at 400,000 STRV, an increase of 25,000 STRV and beet shrink is increased to 8.12 percent Florida cane sugar production is increased 36,800 STRV to 1.979 million on processors' reassessment of the effect of the February freeze on sugarcane yield and on good growing conditions this spring. Louisiana cane sugar production is unchanged. Imports at 3.260 million STRV are unchanged from last month. Deliveries for human consumption are increased 125,500 STRV to 12.385 million in line with an increase made to deliveries in 2025/26. For 2025/26, deliveries were increased based on stronger domestic deliveries and direct consumption imports during the first 7 months of the fiscal year than originally forecast. Ending stocks are residually projected at 1.660 million STRV for an ending stocks-to-use ratio of 13.26 percent.

Mexico sugar production for 2026/27 is based on FAS Mexico City Post forecasts. Sugar production for 2026/27 is projected at 5.283 million metric tons (MT), about a 1.0 percent increase over the previous year. Seasonal rains during mid-2025 alleviated drought conditions but a better recovery is constrained by pressures in agricultural inputs markets, especially fertilizer prices and other input costs, that imply relatively lower yields. Area harvested is projected at 748,000 hectares (ha), up from 2025/26 and yield is expected at 65.6 MT/ha. Deliveries for human consumption are down about two percent relative to last year resulting from 2026 tax increases on sweetened beverages. Ending

stocks are projected at 1.063 million MT and include 150,000 MT of below 99.2 percent polarity sugar available for export to the United States in the first quarter of the 2027/28 marketing year. Exports are residually projected at 1.198 million MT: 894,788 MT to the U.S. market under license (unchanged from last month) and 303,325 to other destinations not under license.

R. Markey & Sons, Inc.
Monthly Arrivals Report - Bulk Sugar
June 2026

Bulk Arrivals Schedule

USA - Baltimore, MD

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/6/2026	6/9/2026	UBC SANTOS	14,398	USMCA	Mexico	CSC	2025/26
6/6/2026	6/7/2026	UBC SANTOS	8,763	ReExport	Mexico	CSC	2025/26
6/9/2026	6/15/2026	BALSA 93	6,889	WTO TRQ	Dominican Republic	CAEI	2025/26
6/18/2026	6/28/2026	SUGAR EXPRESS	13,044	Domestic	USA-Louisiana	ASR	2025/26
6/21/2026	6/23/2026	BARGE SOMERSET	13,035	Domestic	USA-Florida	FSMEI	2025/26
6/30/2026	7/1/2026	FREJA BULKER	33,217	WTO TRQ	Dominican Republic	CRC	2025/26

Port Total **89,346**

USA - Chalmette, LA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/1/2026	6/30/2026	LOUISIANA BARGES	34,059	Domestic	USA-Louisiana	PATOUT	2025/26

Port Total **34,059**

USA - New Orleans, LA

-No Bulk Shipment Arrivals-

USA - Crockett, CA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/15/2026	TBD	TAI HERALD	34,574	WTO TRQ	Philippines	CSC	2025/26

Port Total **34,574**

USA - Fairless Hills, PA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/6/2026	6/6/2026	CHARBEL 1	24,605	WTO TRQ	Dominican Republic	CRC	2025/26

Port Total **24,605**

USA - Savannah, GA

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/2/2026	6/4/2026	CENTURY EMERALD	8,018	WTO TRQ	Bolivia	Sucden	2025/26
6/9/2026	6/9/2026	CENTURY BRIGHT	13,670	USMCA	Mexico	Sucden	2025/26
6/9/2026	6/19/2026	TOSA HARMONY	31,100	Bond	Guatemala	Alvean	2025/26
6/13/2026	6/15/2026	KNOT REFINED	16,950	Domestic	USA-Florida	FSMEI	2025/26

Port Total **69,738**

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
6/10/2026	6/10/2026	SHOVERLER*	8,864	2nd Tier Duty	Belize	Sucro Sourcing	2025/26

Port Total **8,864**

USA - Detroit, MI

-No Bulk Shipment Arrivals-

USA - Brownsville, TX

-No Bulk Shipment Arrivals-

R. Markey & Sons, Inc.
Monthly Arrivals Report - Bulk Sugar
June 2026

USA - Houston, TX

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/2/2026	6/2/2026	LOUISE*	14,763	2nd Tier Duty	Brazil	Wholesome Sweeteners	2025/26

Port Total 14,763

USA - Toledo, OH

-No Bulk Shipment Arrivals-

USA - Sacramento, CA

-No Bulk Shipment Arrivals-

USA - Stockon, CA

-No Bulk Shipment Arrivals-

USA - Chicago, IL

-No Bulk Shipment Arrivals-

USA - Jacksonville, FL

-No Bulk Shipment Arrivals-

USA - San Diego, CA.

Arrival Date	Discharge Date	Vessel	Long Tons	Quota Type	Origin	Seller	Quota Year
6/25/2026	6/25/2026	LUENHO	21,596	2nd Tier Duty	Brazil	ZUCARMEX	2025/26

Port Total 21,596

USA - Port Canaveral, FL

-No Bulk Shipment Arrivals-

GRAND TOTAL: 297,545 Long Tons

Notes: * Details not confirmed by the Importer.
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R. Markey & Sons, Inc.
Monthly Arrivals Report - Bulk Sugar
June 2026

Year-on-Year Comparision By Quota Classification

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
May 25				75,802		1,279		86,685	60,588	224,354
Jun 25		48,718		66,009		39,628		42,330	97,526	294,211
Total	173,336	58,333	75,735	677,483		147,325	53,196	290,219	682,406	2,158,033

Quota Period: October 1, 2025 to September 30, 2026

Year	2nd Tier	Bond	CAFTA	Domestic	FTA	ReExport	Refined	USMCA	WTO TRQ	Total
Oct 25	89,822	25,481		49,316		29,527		6,889	60,810	261,845
Nov 25	24,159			68,721		5,914		22,232	96,970	217,996
Dec 25	83			75,374				10,560	135,052	221,069
Jan 26	39,571	7,307		84,987		40,235		11,607	21,812	205,519
Feb 26			51,243	48,007		85,692			37,003	221,945
Mar 26	41,003		10,320	45,042		29,525			63,242	189,132
Apr 26				89,208		13,706		29,888	98,334	231,136
May 26		16,732	18,590	98,529		16,169		4,571	66,567	221,158
Jun 26	36,359	39,964		77,088		8,763		28,068	107,303	297,545
Total	230,997	89,484	80,153	636,272		229,531		113,815	687,093	2,067,345