

Harvest Update for the Australian Sugar Industry

Fortnight Ending 13 June 2021

Photo supplied by CANEGROWERS



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Editor: LINDSAY JOLLY

Better Start to the Australian Crush

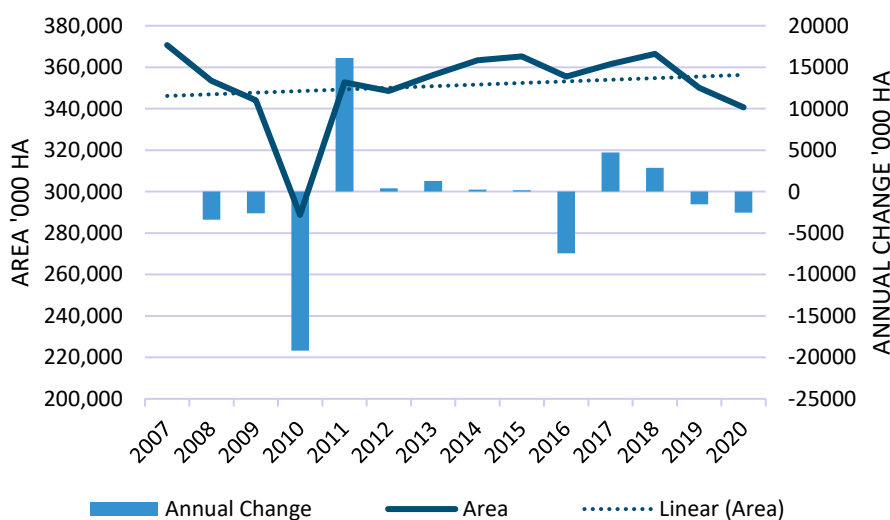
The Queensland cane harvest and crush commenced with the Tableland mill and Mackay Sugar starting on 1 and 3 June respectively. All four Wilmar Mills started the following week on 8 June, as did the New South Wales industry

Australia’s 22 sugar mills (2 mills fewer than last season) should process [redacted] of cane, according to the ASMC, as against [redacted] last season. Industry performance remains well below the not-too-distant 2016 level of 36.5 mln tonnes crushed.

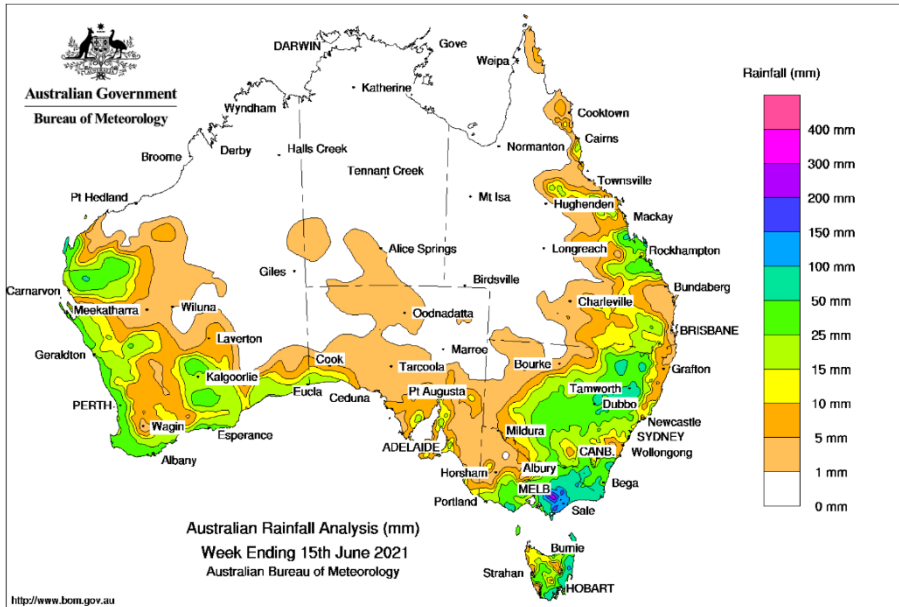
Assuming that the crush progresses well over coming weeks – allowing solid harvest progress and good sugar recovery - WKS suggests sugar production from the 2021 crush could reach as much as [redacted], little changed from 4.3 mln tonnes tel quel seen in 2020.

Meanwhile, ASMC data has revealed that Queensland’s area harvested for crushing in the 2020 season had slumped to just [redacted] hectares, the lowest area since 1993 (excluding disastrous 2010 level). As was the case in 2020, almost all mills in Queensland will operate with a sub-optimal cane supply in 2021, illustrating just how important ongoing efforts to boost productivity are for the industry’s future.

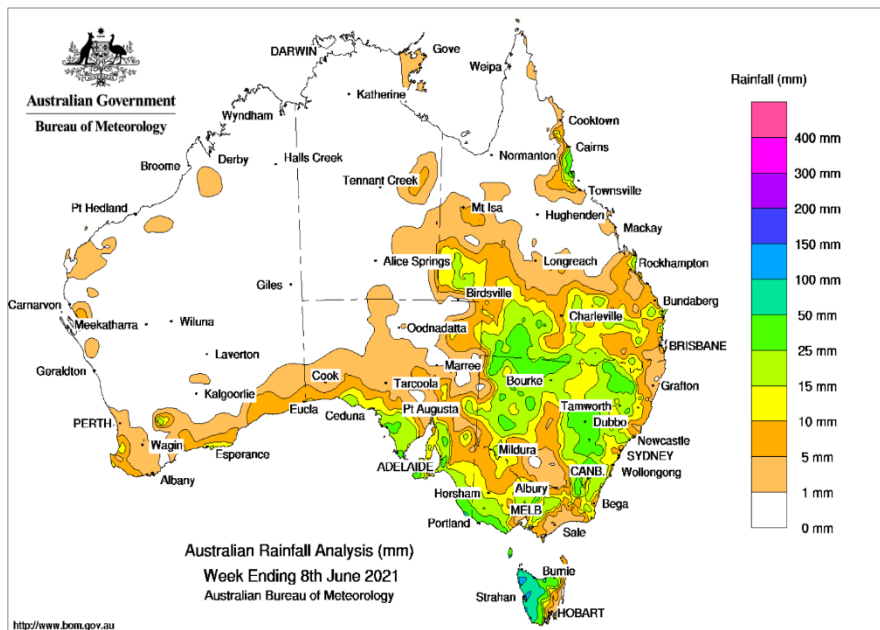
Queensland: Area Harvested for Milling



Rainfall totals map for the 7 days ending 9 am 15 June 2021



Rainfall totals map for the 7 days ending 9 am 8 June 2021



<http://www.bom.gov.au/climate/rainfall/>

Fig. 1 Australia: Weekly Crush

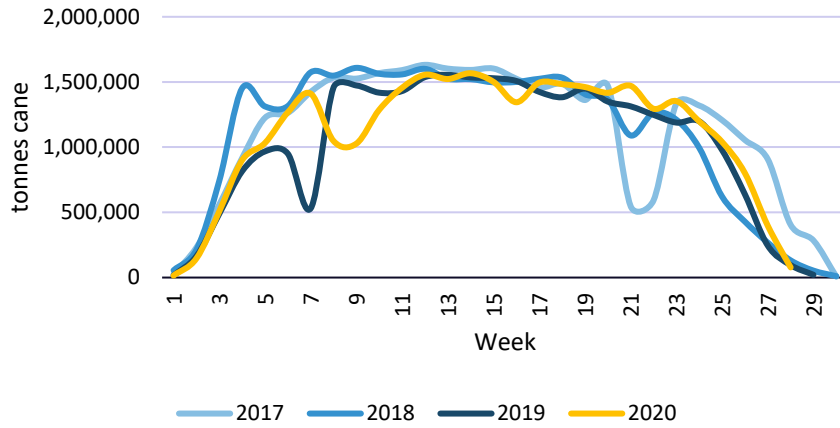


Fig. 2 Australia: Cumulative Weekly Crush

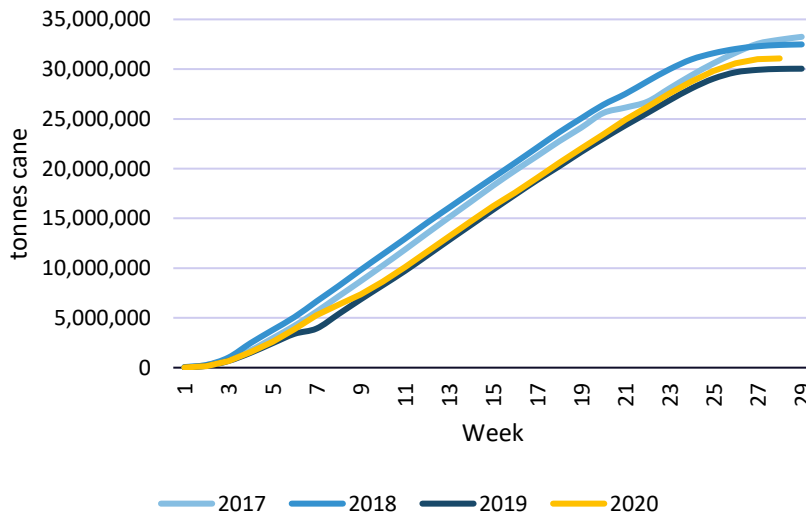
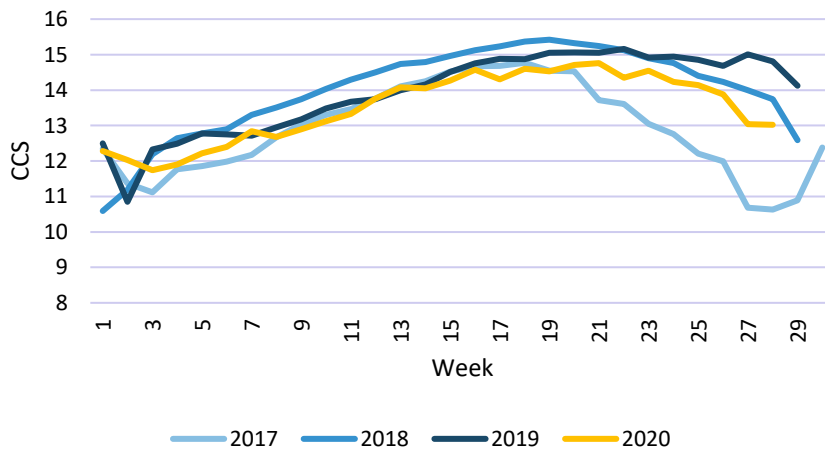


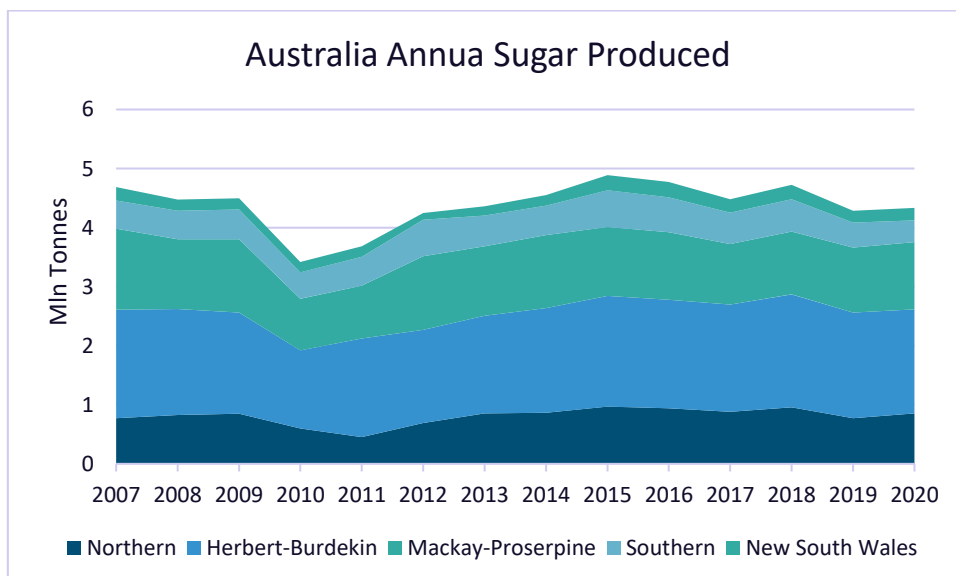
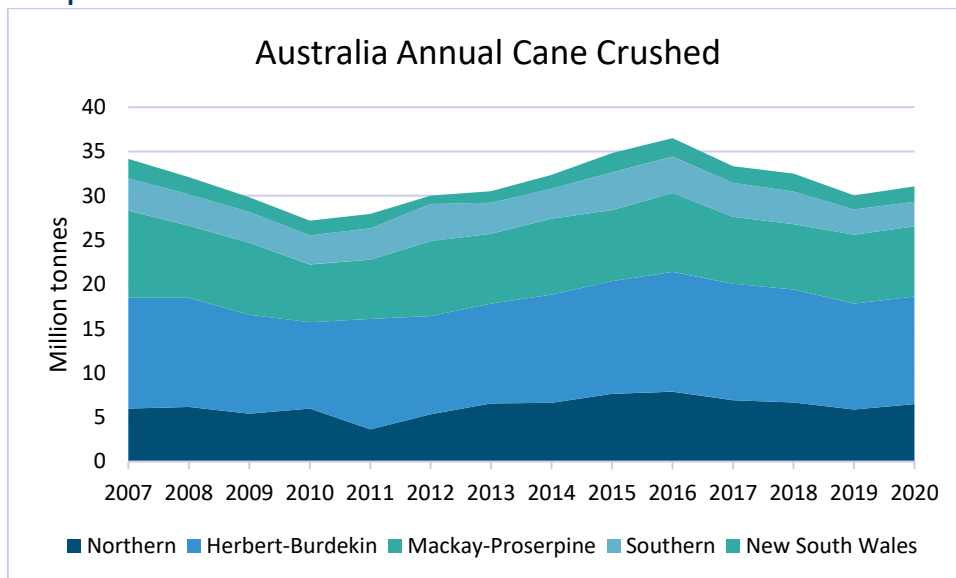
Fig. 3 Australia Weekly CCS



Why don't we report sugar production?

There are no sugar production data in the public domain issued in conjunction with the weekly cane crush for the Australian sugar industry. Considerable caution needs to be exercised if approximating actual sugar production from cane tonnage crushed and sugar content. Commercial Cane Sugar (CCS) is an estimate of the amount of recoverable sugar in sugarcane, measured as a percentage of the cane by weight. Importantly, sugar content needs to be taken together with mill recovery of sugar. Mill recoveries are improving along with improvements in technology. Some mills reportedly recover as much as 1.02kg sugar per kg of CCS. A rough estimate of sugar production (tonnes tel quel) can therefore be derived using the following formula: total sugar make = CCS x tonnes cane x 1.02 . The actual number however can vary from this “theoretical calculation” depending on each mills recovery rate which also reflects losses in bagasse, mud and molasses. In short, the Co-efficient of Work characteristics of sugar mills do vary quite significantly. Furthermore, the crush numbers are derived by totalling the crush across multiple mills, so using a simple theoretical formula can yield a distorted sugar production estimate as against the actual.

Historical Perspective 2021



STATISTICS

Table 1: Australia Weekly Crush (tonnes)

Week Ending	Weekly Crush	To-Date Crush	Weekly CCS	To-Date CCS
2021				
6/06/2020				
13/06/2020				
2020				
7/06/2020	14,891	14,891	12.28	12.28
14/06/2020	146,629	161,520	12.03	12.06

Table 2: Australian Weekly Crush by Region (tonnes)

Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
2021							
6/06/2020							
13/06/2020							
2020							
7/06/2020	14,891	-	-	-	14,891	-	14,891
14/06/2020	24,657	64,665	26,422	-	115,744	30,885	146,629

Source: ASMC, WKS Estimates.

Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
2021							
6/06/2020							
13/06/2020							
2020							
7/06/2020	14,891	-	-	-	14,891	-	14,891
14/06/2020	39,548	64,665	26,422	-	130,635	30,885	161,520

Source: ASMC, WKS Estimates.

Table 4: Australian CCS Content by Region (%)

Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
2021							
6/06/2020	12.35	-	10.93	-	11.71	-	11.72
13/06/2020	13.01	12.85	11.67	-	12.62	11.11	12.47
2020							
7/06/2020	12.28	-	-	-	12.28	-	12.28
14/06/2020	13.00	11.99	11.24	-	12.03	na	12.03

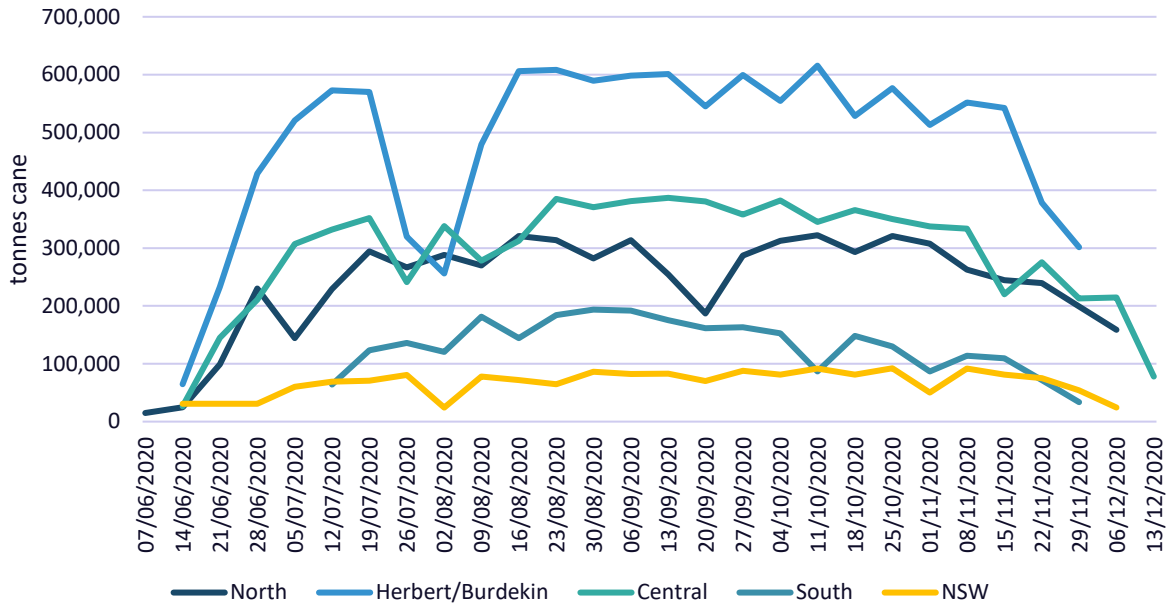
Source: ASMC, WKS Estimates.

Table 5: Australian Cumulative CCS Content by Region (%)

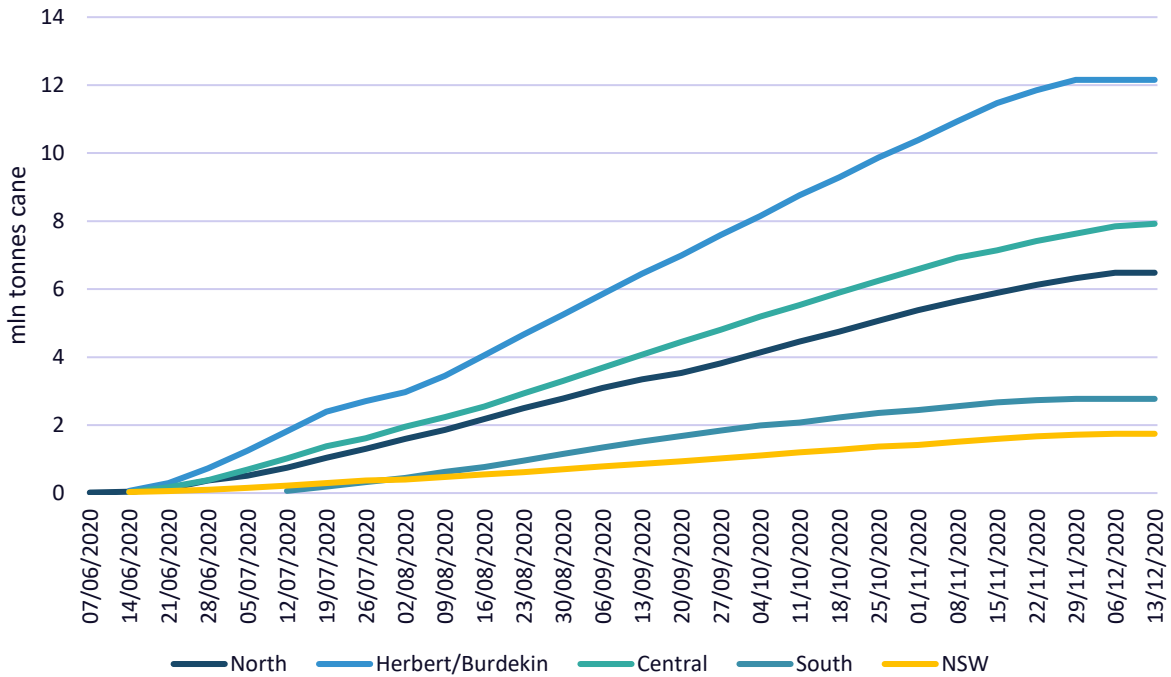
Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
2021							
6/06/2020	12.35	-	10.93	-	11.71	-	11.72
13/06/2020	12.70	12.85	11.52	-	12.52	11.11	12.39
2020							
7/06/2020	12.28	-	-	-	12.28	-	12.28
14/06/2020	12.73	11.99	11.24	-	12.06	na	12.06

Source: ASMC, WKS Estimates.

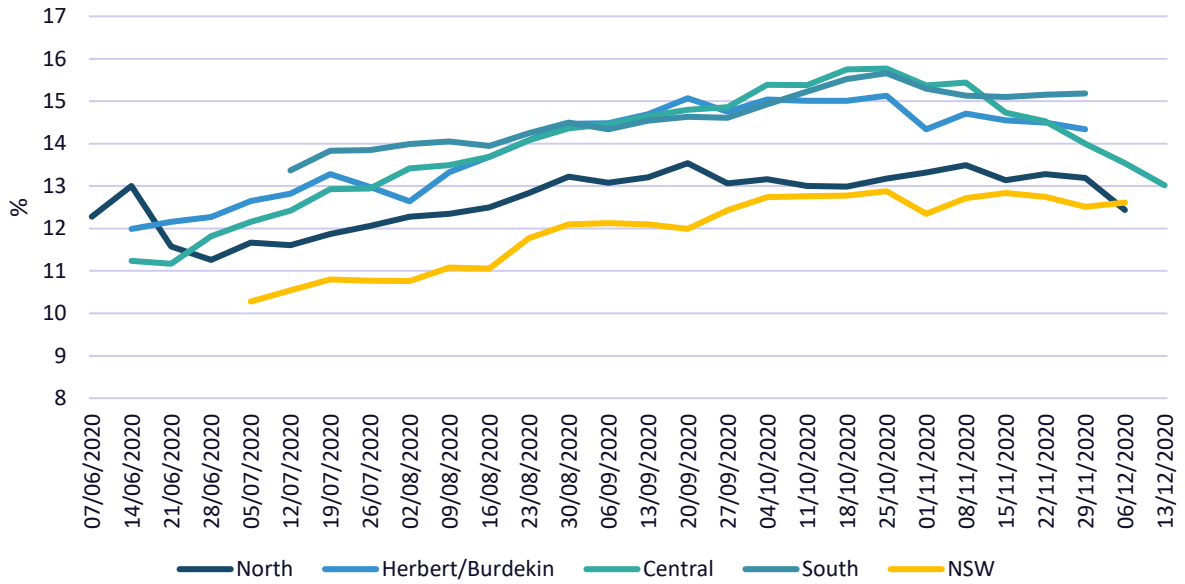
Weekly Crush by Region 2020



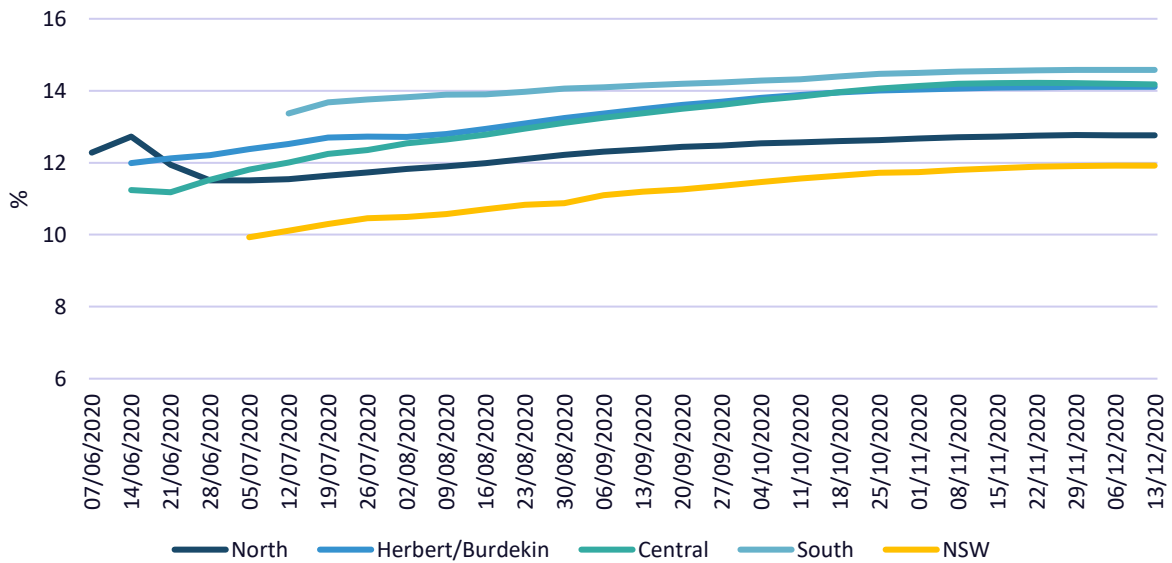
Cumulative Weekly Crush by Region 2020



Weekly CCS Content by Region 2020



Cumulative CCS Content by Region 2020





PRESS REPORT

Positive Outcome for Sugarcane Growers in FTA

Australia’s sugarcane growers have welcomed the opportunity to grow sugar exports to the United Kingdom under an in-principal trade deal between the two countries. The proposed UK-Australia Free Trade Agreement gives immediate and substantial up-front tariff-free access for 80,000 tonnes of Australian sugar - a significant boost on the 9,925 tonne quota to the whole European Union prior to Brexit. The agreement with the UK allows for the sugar trade to grow over time by 20,000 tonnes each year for the next eight years. According to CANEGROWERS, Australian sugar is of high quality, sustainably and ethically produced and well placed to top up local beet sugar production so that UK refiners can meet domestic consumption demands.

[CANEGROWERS](#) 16 June

Wilmar Production Reports

Weekly production figures		
Burdekin region mills		
Week 1, ending 12 June 2021		
Cane crushed	This week	Season to date
Invicta	84,369	84,369
Pioneer	49,058	49,058
Kalamia	36,906	36,906
Inkerman	38,739	38,738
Burdekin	209,072	209,072

All four of Wilmar Sugar’s Burdekin mills commenced crushing on Tuesday 8 June as planned. After working through some early commissioning issues, the factories were crushing consistently by the end of the week. Weekly throughput was just under 210,000 tonnes of cane. Average weekly CCS was 12.83 which is above budget due to cool and fine weather conditions leading up to the start of crushing.

[Wilmar](#) 14 June



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