

Harvest Update for the Australian Sugar Industry

Fortnight Ending 27 June 2021

Photo supplied by CANEGROWERS



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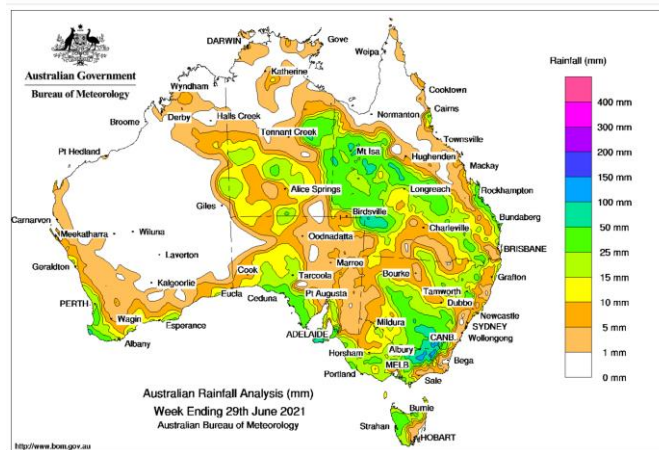
Editor: LINDSAY JOLLY

Australian Crush Soldiers On Despite Rain Interruptions

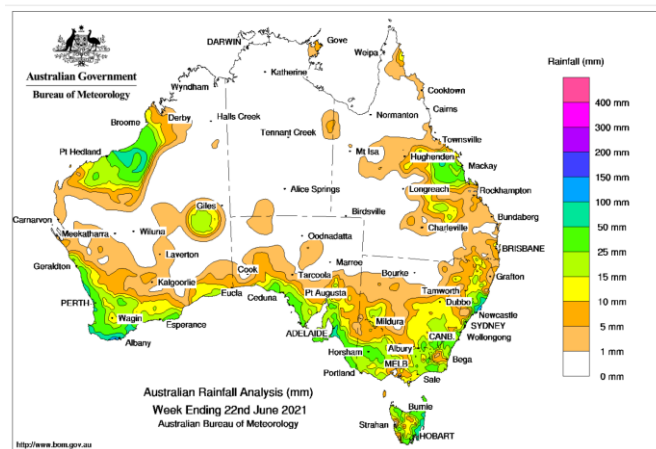
Additional mills commenced crushing in the fortnight ending 27 June, boosting crushing volumes, even if rain interrupted harvesting across much of the industry (see Wilmar production reports below, for instance). The second fortnight saw the cumulative Australian crush volume reach an estimated [REDACTED] tonnes (WE 27 June). The comparable figure last season was substantially less at [REDACTED] tonnes, due to much more severe rain disturbances. By the end of week 4, Queensland's to-date crush had reached [REDACTED] tonnes and NSW an estimated [REDACTED] tonnes. Only three mills had not commenced crushing by WE 27 June, including Proserpine in the Central region, and Isis and Rocky Point in the South. To-date CCS levels for the Australian industry are [REDACTED] and so far have averaged [REDACTED] units, [REDACTED] units associated with the horror start to last season's campaign.

Australia's 22 sugar mills (2 mills fewer than last season with the closure of Maryborough and Bundaberg Sugar's Bingara Mill – both in the South) should process [REDACTED] mln tonnes of cane, according to the ASMC, as against [REDACTED] mln tonnes last season. [REDACTED]

Rainfall totals map for the 7 days ending 9 am 29 June 2021



Rainfall totals map for the 7 days ending 9 am 22 June 2021



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

Fig. 1 Australia: Weekly Crush

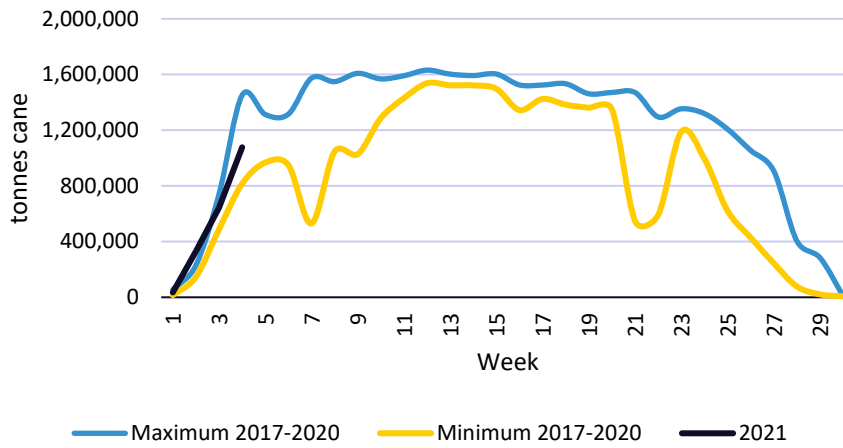


Fig. 2 Australia: Cumulative Weekly Crush

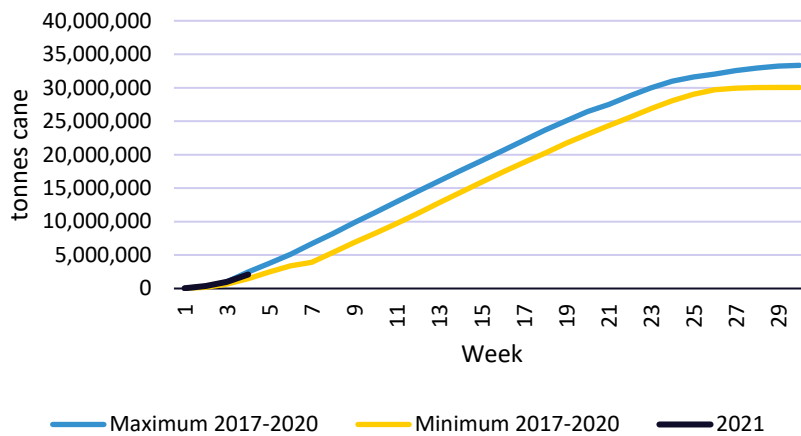
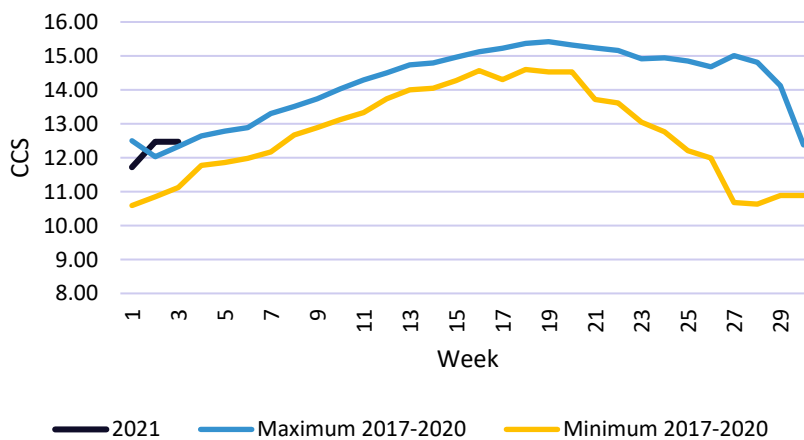


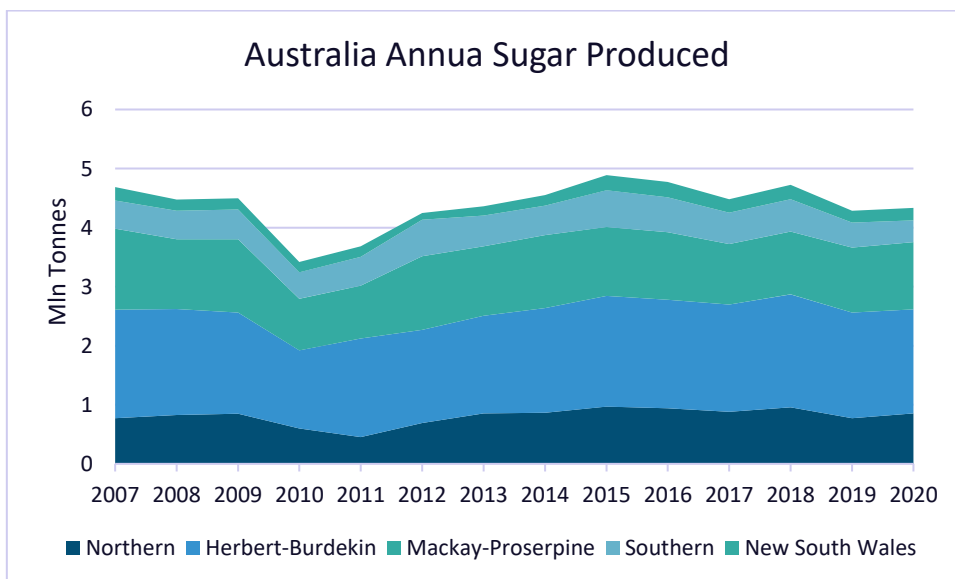
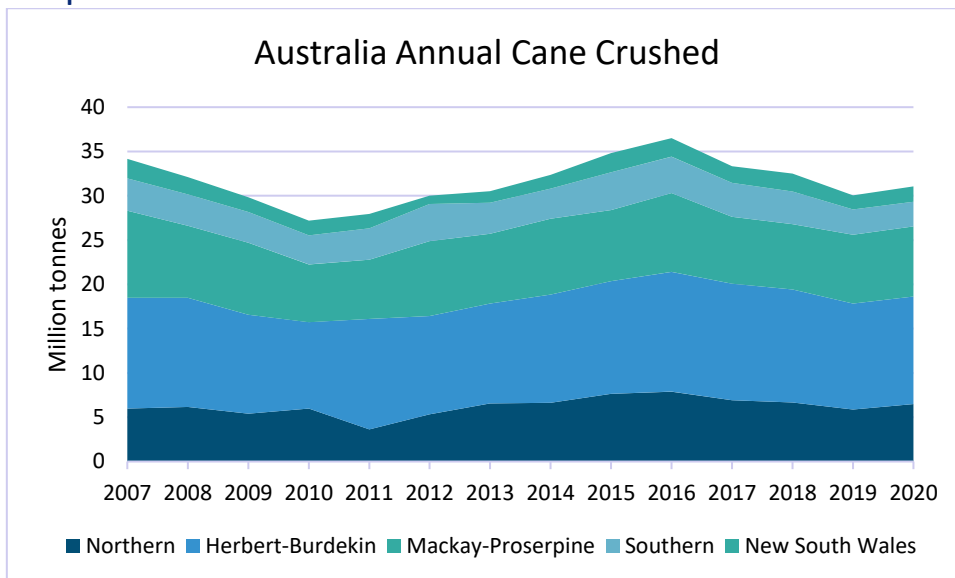
Fig. 3 Australia: Weekly CCS



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 mill's 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 | 35,151 | 35,151 | 11.72 | 11.72 |
| 13/06/2020 | 332,511 | 367,662 | 12.47 | 12.39 |
| 20/06/2020 | | | | |
| 27/06/2020 | | | | |
| 2020 | | | | |
| 7/06/2020 | 14,891 | 14,891 | 12.28 | 12.28 |
| 14/06/2020 | 146,629 | 161,520 | 12.03 | 12.06 |
| 21/06/2020 | 507,354 | 668,839 | 11.74 | 11.81 |
| 28/06/2020 | 900,277 | 1,569,115 | 11.90 | 11.86 |

Table 2: Australian Weekly Crush by Region (tonnes)

| Week | North | Herbert/Burdekin | Central | South | Queensland | NSW | Australia |
|-------------|--------|------------------|---------|-------|------------|--------|-----------|
| 2021 | | | | | | | |
| 6/06/2020 | 19,602 | - | 15,549 | - | 35,151 | - | 35,151 |
| 13/06/2020 | 28,184 | 209,072 | 60,288 | - | 297,544 | 34,967 | 332,511 |
| 20/06/2020 | | | | | | | |
| 27/06/2020 | | | | | | | |

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 | 19,602 | - | 15,549 | - | 35,151 | - | 35,151 |
| 13/06/2020 | 47,786 | 209,078 | 75,831 | - | 332,695 | 34,967 | 367,662 |
| 20/06/2020 | | | | | | | |
| 27/06/2020 | | | | | | | |

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 | - | 11.72 | - | 11.72 |
| 13/06/2020 | 13.01 | 12.85 | 11.67 | - | 12.62 | 11.11 | 12.47 |
| 20/06/2020 | | | | | | | |
| 27/06/2020 | | | | | | | |

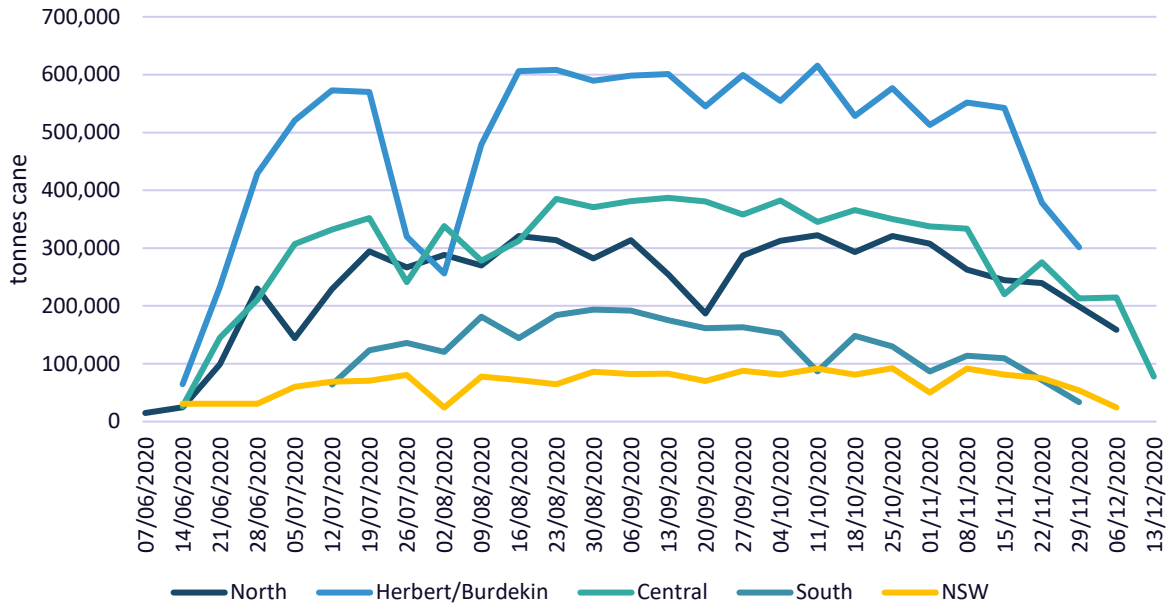
Source: ASMC, WKS Estimates.

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

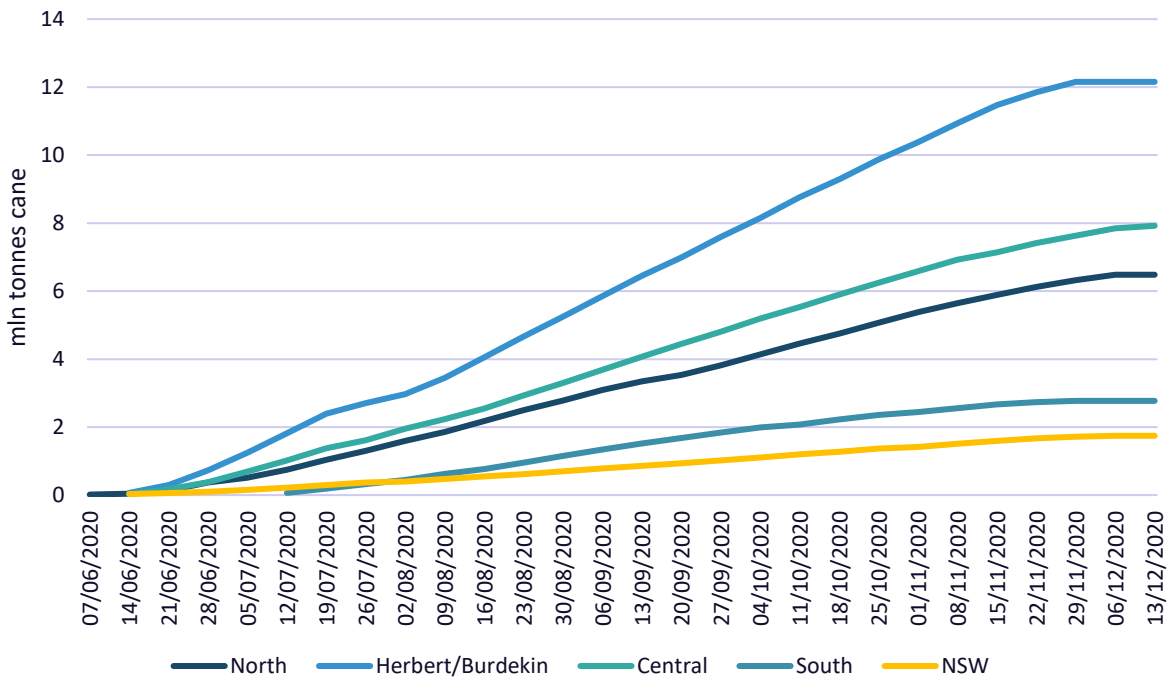
| Week | North | Herbert/Burdekin | Central | South | Queensland | NSW | Australia |
|-------------|-------|------------------|---------|-------|------------|-------|-----------|
| 2021 | | | | | | | |
| 6/06/2020 | 12.35 | - | 10.93 | - | 11.72 | - | 11.72 |
| 13/06/2020 | 12.70 | 12.85 | 11.52 | - | 12.52 | 11.11 | 12.39 |
| 20/06/2020 | | | | | | | |
| 27/06/2020 | | | | | | | |

Source: ASMC, WKS Estimates.

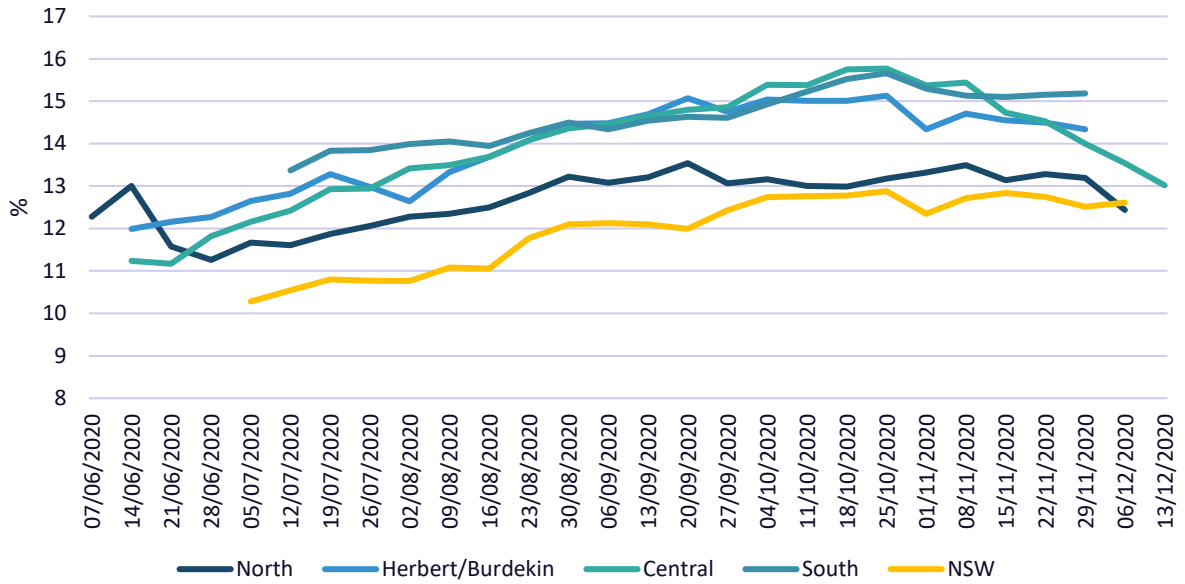
Weekly Crush by Region 2020



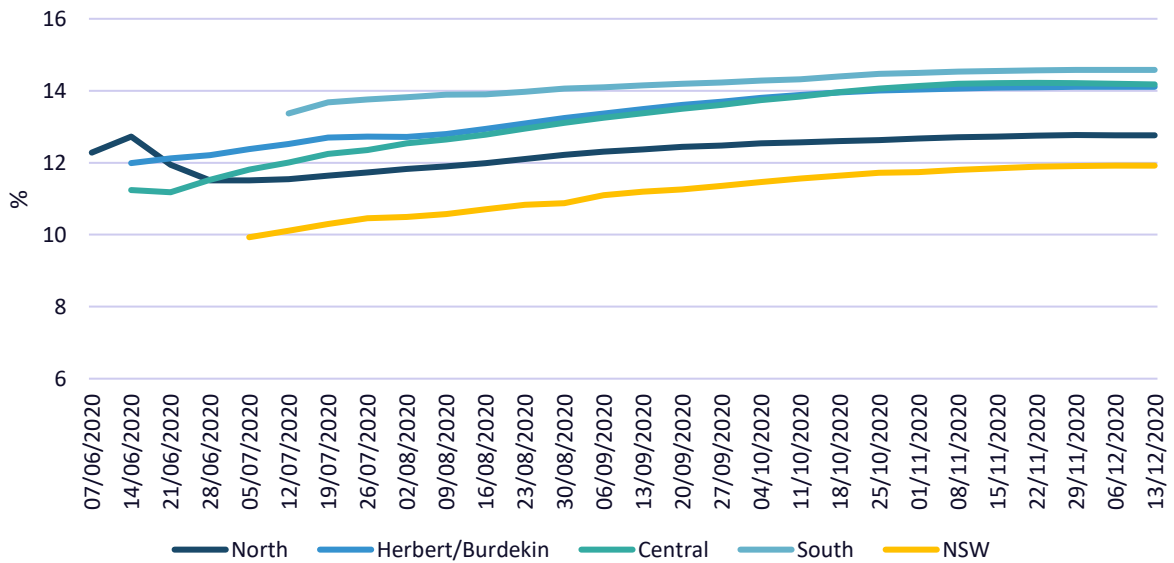
Cumulative Weekly Crush by Region 2020



Weekly CCS Content by Region 2020



Cumulative CCS Content by Region 2020





PRESS REPORT

Wilmar Production Reports

Burdekin

| Weekly production figures | | |
|------------------------------------|------------------|-----------------------|
| Burdekin region mills | | |
| Week 3, ending 26 June 2021 | | |
| Cane crushed | This week | Season to date |
| Invicta | 148,626 | 377,451 |
| Pioneer | 78,089 | 190,548 |
| Kalamia | 69,194 | 177,863 |
| Inkerman | 54,098 | 129,609 |
| Burdekin | 350,006 | 875,472 |

Throughput for the Burdekin mills in week three was just over 350,000 tonnes, a good outcome even though wet weather again had an impact on cane supply. Inkerman Mill had a mixed week, recording both good crush rates and extended stops. Wet weather from the previous week meant crushing did not resume until Sunday night (20 June). There was a 24-hour stop due to bagasse system issues, and more rain mid-week added to the already wet ground conditions. The north bank mills experienced some cane supply shortfalls from the rain on Wednesday evening, but much lower totals meant growers were able to burn and harvesters were able to get back into paddocks sooner. Average weekly CCS was 13.45. This was a good outcome given the wet conditions experienced across the region in the middle of the week.

[Wilmar](#) 28 June

| Weekly production figures | | |
|------------------------------------|------------------|-----------------------|
| Burdekin region mills | | |
| Week 2, ending 19 June 2021 | | |
| Cane crushed | This week | Season to date |
| Invicta | 144,457 | 228,825 |
| Pioneer | 63,402 | 112,460 |
| Kalamia | 71,739 | 108,645 |
| Inkerman | 36,589 | 75,334 |
| Burdekin | 316,186 | 525,264 |

Throughput for the Burdekin mills in week two of the season was just over 316,000 tonnes. This was achieved despite the impact of wet weather on cane supply. Inkerman Mill experienced the greatest impact, with some areas receiving more than 60mm of rain for the week. The mill ran out of cane on Thursday morning and did not resume crushing operations until Sunday night. The north bank mills experienced some cane supply shortfalls, but much lower rainfall totals meant harvesters were able to get back into paddocks sooner. Average weekly CCS was 13.05. This was a good outcome given the wet conditions experienced across the region.

[Wilmar](#) 21 June

Herbert

| Weekly production figures | | |
|--|----------------|----------------|
| Wilmar Sugar Herbert region mills Week 2, ending 26 June 2021 | | |
| | This week | Season to date |
| Cane crushed | | |
| Victoria | 100,010 | 113,845 |
| Macknade | 35,329 | 35,329 |
| Total | 135,339 | 149,174 |
| | | |
| Crop forecast | 4.38M | |

A total of 135,339 tonnes of cane were crushed for the week. Macknade Mill commenced crushing operations on Monday morning 21 June. The average weekly CCS of 11.92 is encouraging. Victoria Mill will have an A-side maintenance stop on Wednesday 29 June.

[Wilmar](#), 28 June

| Weekly production figures | | |
|--|---------------|----------------|
| Wilmar Sugar Herbert region mills Week 1, ending 19 June 2021 | | |
| | This week | Season to date |
| Cane crushed | | |
| Victoria | 13,835 | 13,835 |
| Macknade | - | - |
| Total | 13,835 | 13,835 |
| | | |
| Crop forecast | 4.38M | |

The Herbert region’s 2021 crushing season commenced on Friday 18 June at Victoria Mill. Macknade Mill commenced crushing operations on Monday 21 June. Throughput was restricted due to wet field conditions limiting cane supply. A total of 13,835 tonnes of cane were crushed for the week.

[Wilmar](#), 21 June

Plane Creek

| Weekly production figures | | |
|---|-----------|----------------|
| Wilmar Sugar Plane Creek Mill Week 2, Week ending 26 June 2021 | | |
| | This week | Season to date |
| Cane crushed | 54,204 | 76,394 |
| Average bin weight | 3.85 | 3.87 |
| CCS | 12.15 | 12.09 |

Plane Creek Mill crushed just more than 54,000 tonnes of cane for the week, bringing the season total to 76,394 tonnes. Weekly throughput was impacted by a lengthy unscheduled stop early in the week, due to bagasse bin issues. Widespread showers on Wednesday and again on Saturday disrupted harvesting and caused cane supply shortfalls during the latter part of the week. Week two saw a welcome improvement in CCS levels, with the weekly average closing out at 12.15.

[Wilmar](#) 28 June

| Weekly production figures | | |
|---|-----------|----------------|
| Wilmar Sugar Plane Creek Mill Week 1, Week ending 19 June 2021 | | |
| | This week | Season to date |
| Cane crushed | 22,191 | 22,191 |
| Average bin weight | 3.92 | 3.92 |
| CCS | 11.93 | 11.93 |

Plane Creek Mill’s 2021 crushing season commenced on Tuesday 15 June. The factory settled in well, with very few mechanical or production issues during the first week of operation. However, widespread rain and showers in the middle of the week impacted harvesting operations. This resulted in reduced crush rates and a lengthy cane supply stoppage. The average bin weight was 3.92 tonnes. Average weekly CCS was 11.93.

[Wilmar](#) 21 June

Proserpine

To commence Crushing 29 June



www.wks-weknowsugar.com | lindsayjolly@wks-weknowsugar.com



www.apic-consulting.com | alexis@apic-consulting.com

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