

# Harvest Update for the Australian Sugar Industry

**Fortnight Ending 11 July 2021**

Photo supplied by CANEGROWERS



**VOL 4 NO. 3**  
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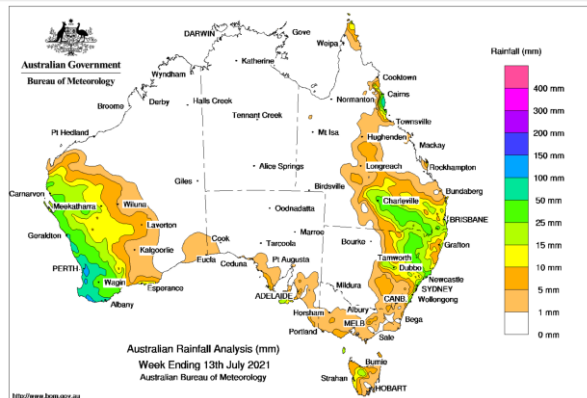
**Editor: LINDSAY JOLLY**

## Rain Hampers Australian Crush

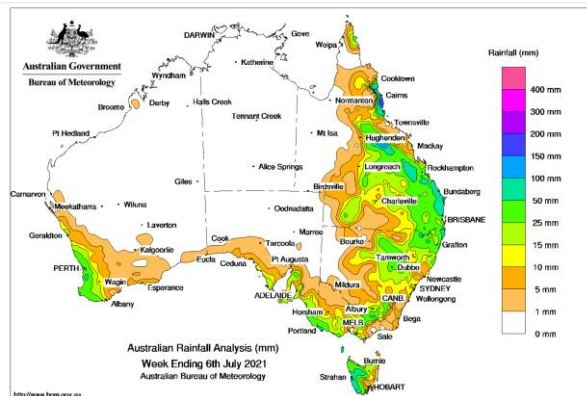
Australia’s crush rate has slowed as rain has hampered harvesting operations. All mills are crushing except the small Rocky Point mill in Queensland which is due to start operations around 19 July. Both week 5 and week 6 (WE 11 July) achieved a crush tally of [REDACTED], whereas typically the industry would be crushing [REDACTED]/week at this stage. The third fortnight saw the cumulative Australian crush volume reach [REDACTED] mln tonnes. The comparable figure last season was lower at [REDACTED] mln tonnes, due to much more severe rain disturbances. Harvest progress this past fortnight has been variable across regions, with the Burdekin avoiding any significant rain interruption, but the [REDACTED], for instance, achieved crush figures of only [REDACTED] in week 5 and week 6, well below the almost [REDACTED] achieved earlier in week 4. Queensland’s to-date crush had reached [REDACTED] mln tonnes and NSW close to 234,000 tonnes by the end of week 6. Despite the rain, the to-date CCS level for the Australian industry is [REDACTED] and so far has averaged [REDACTED] units, well above 12.07 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] of cane, according to the ASMC, as against [REDACTED] mln tonnes last season. 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] mln tonnes, [REDACTED]

Rainfall totals map for the 7 days ending 9 am 13 July 2021



Rainfall totals map for the 7 days ending 9 am 6 July 2021



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

Fig. 1 Australia: Weekly Crush

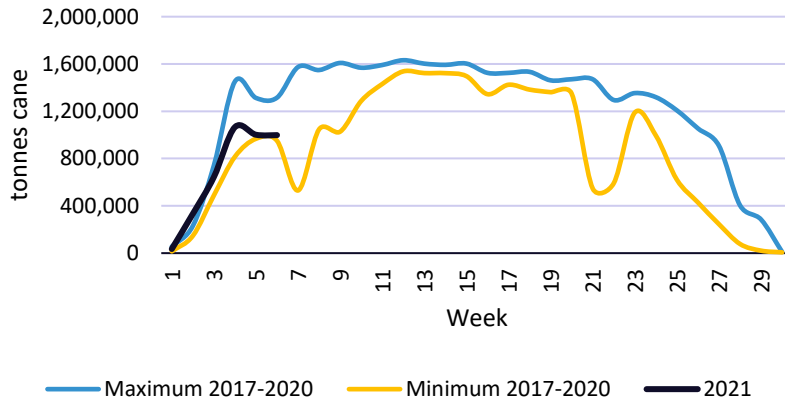
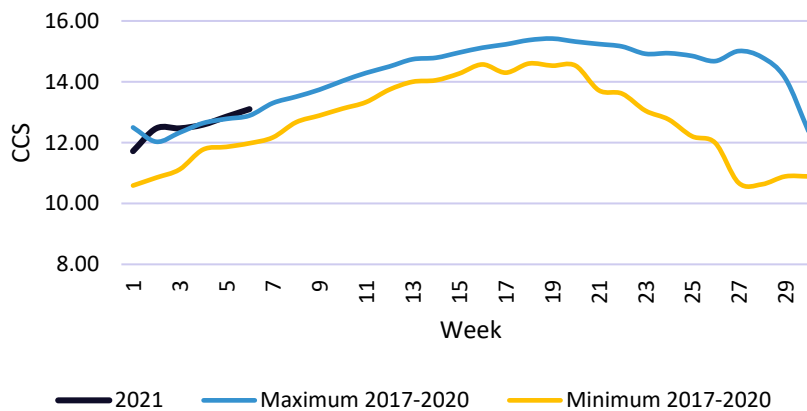


Fig. 2 Australia: Cumulative Weekly Crush



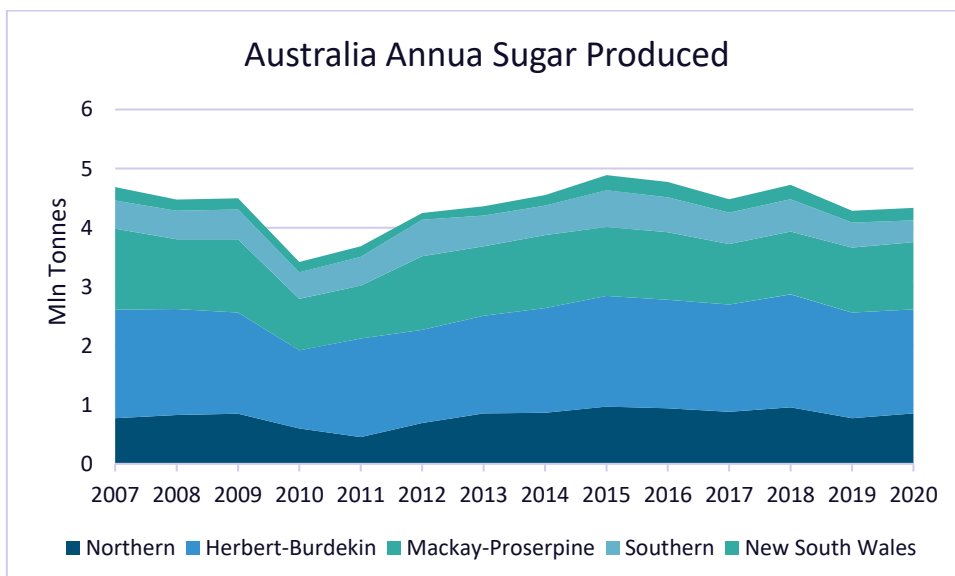
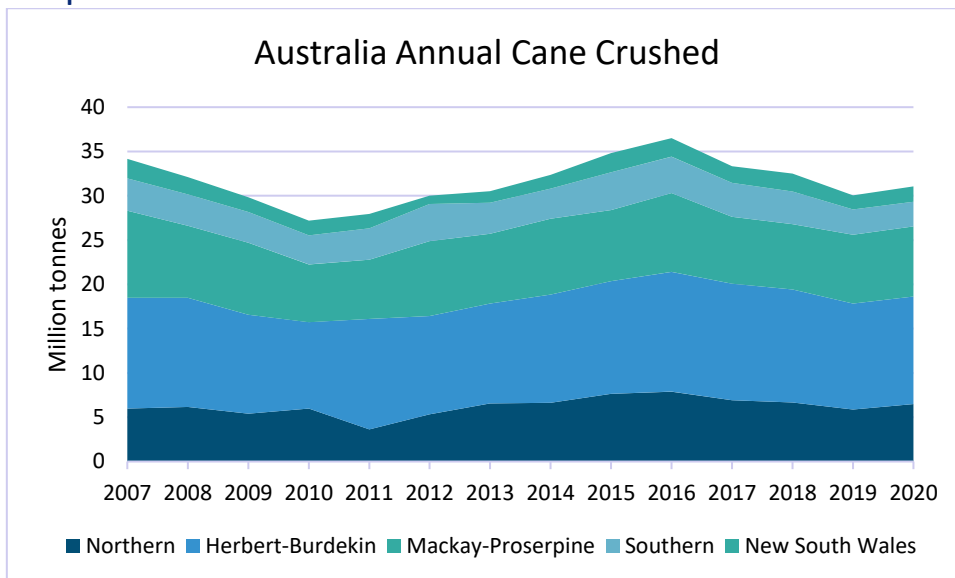
Fig. 3 Australia Weekly CCS



### 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
<b>2021</b>				
6/06/2021	35,151	35,151	11.72	11.72
13/06/2021	332,511	367,662	12.47	12.39
20/06/2021	643,916	1,011,578	12.47	12.44
27/06/2021				
4/07/2021				
11/07/2021				
<b>2020</b>				
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
5/07/2020	1,032,063	2,601,178	12.22	11.91
12/07/2020	1,267,116	3,868,294	12.40	12.07

**Table 2: Australian Weekly Crush by Region (tonnes)**

Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	19,602	-	15,549	-	35,151	-	35,151
13/06/2021	28,184	209,072	60,288	-	297,544	34,967	332,511
20/06/2021	156,244	330,223	104,392	-	590,859	53,057	643,916
27/06/2021							
4/07/2021							
11/07/2021							

Source: ASMC, WKS Estimates.

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

Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	19,602	-	15,549	-	35,151	-	35,151
13/06/2021	47,786	209,078	75,831	-	332,695	34,967	367,662
20/06/2021	204,030	539,301	180,223	-	923,554	88,024	1,011,578
27/06/2021							
4/07/2021							
11/07/2021							

Source: ASMC, WKS Estimates.

**Table 4: Australian CCS Content by Region (%)**

Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	12.35	-	10.93	-	11.72	-	11.72
13/06/2021	13.01	12.85	11.67	-	12.62	11.11	12.47
20/06/2021	12.11	13.00	11.84	-	12.56	11.51	12.47
27/06/2021							
4/07/2021							
11/07/2021							

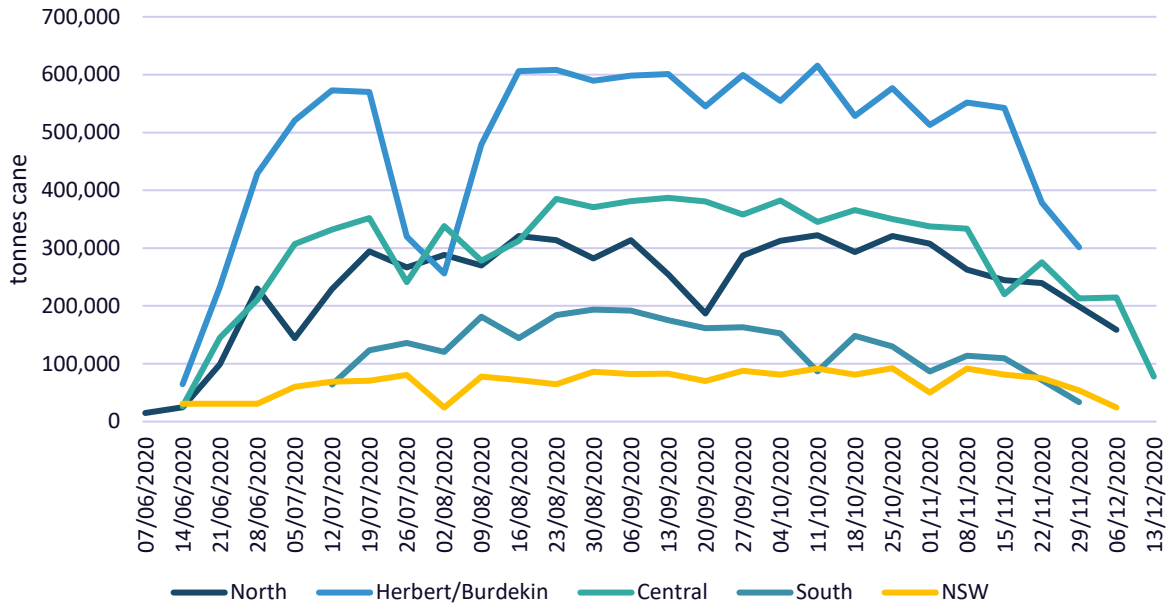
Source: ASMC, WKS Estimates.

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

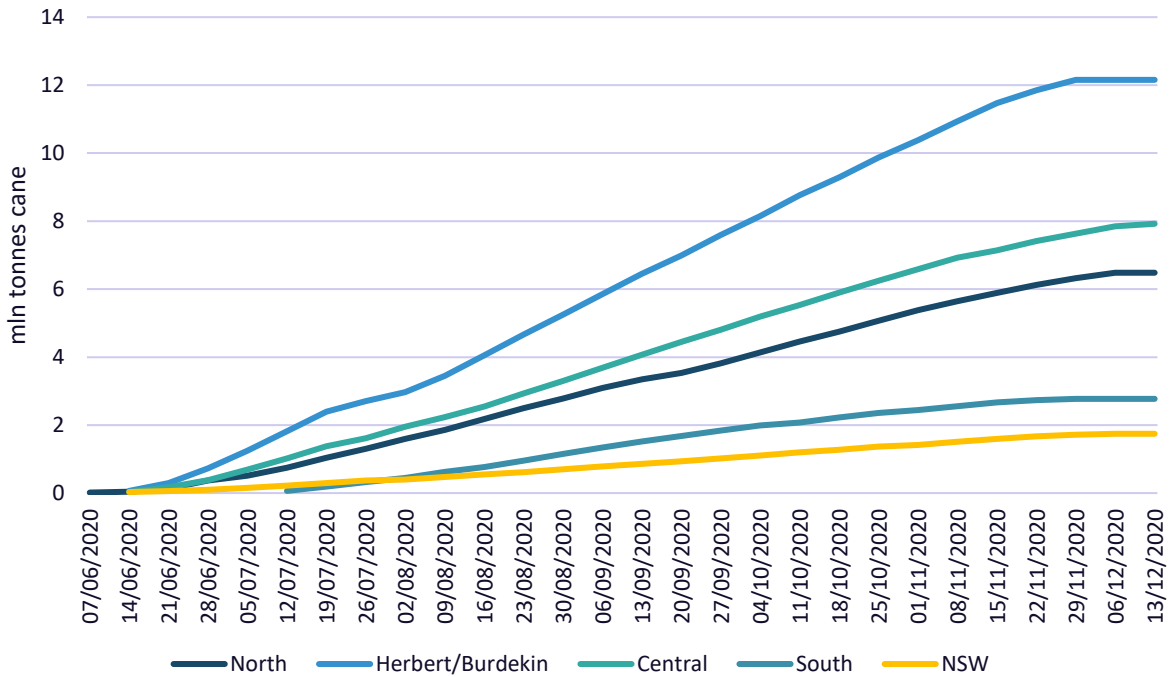
Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	12.35	-	10.93	-	11.72	-	11.72
13/06/2021	12.70	12.85	11.52	-	12.52	11.11	12.39
20/06/2021	12.25	12.94	11.71	-	12.55	11.36	12.44
27/06/2021							
4/07/2021							
11/07/2021							

Source: ASMC, WKS Estimates.

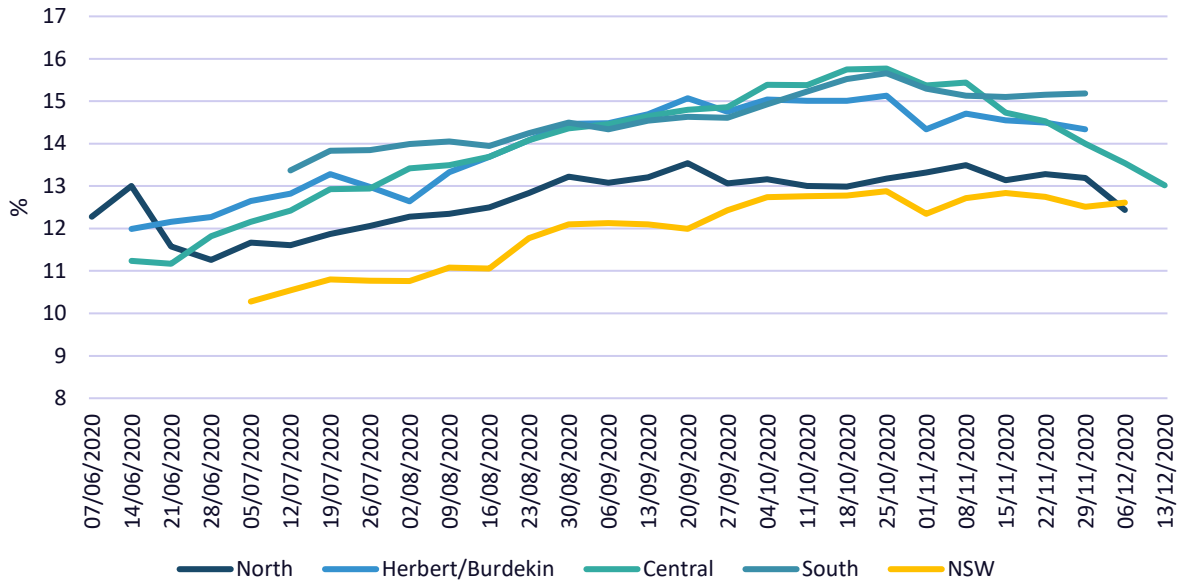
### Weekly Crush by Region 2020



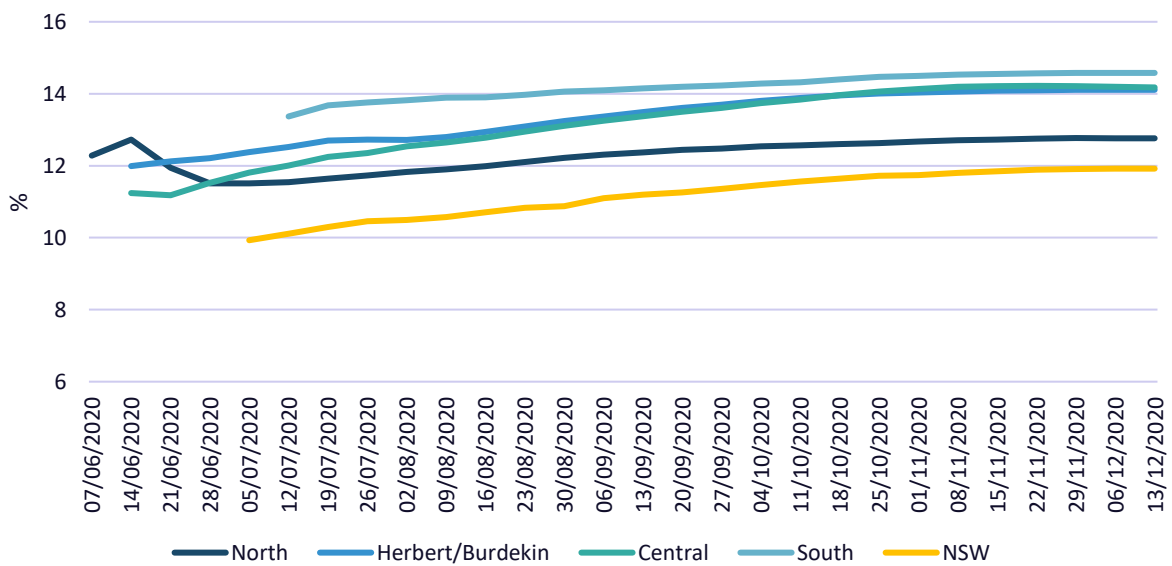
### Cumulative Weekly Crush by Region 2020



### Weekly CCS Content by Region 2020



### Cumulative CCS Content by Region 2020





## PRESS REPORT

### Australian Industry Looking for Industry plan and Roadmap to 2040

The Australian sugarcane industry is looking to develop a situational analysis and an Industry Plan and Roadmap to 2040. The Situational Analysis is intended to identify key factors of influence and critical uncertainties of the industry while taking account of previously developed reports including Sugar Research Australia-commissioned Megatrends Report and Diversification Review.

The proposed Sugarcane Industry Plan and Roadmap is intended to provide a clear path for the Australian industry to protect and grow value by leveraging the industry’s core assets (knowledge, skills, brand capital and supply chain assets). This will include:

- building a common understanding of the key factors of influence (and plausible scenarios considering the possible directional movement of the critical key factors of influence) likely to shape the future for the Australian industry for the period 2021 to 2040;
- based on plausible scenarios, establishing agreed priorities to support the industry in protecting and growing value ;
- developing strategies, initiatives and timelines to support the industry’s priorities, providing insight into the skills, resources, innovation, and infrastructure the industry will need to reach its goals: and
- providing a platform for the industry to work together on the universal priorities of strategic importance.

[Sugar Research Australia](#) June 2021

### Wilmar Production Reports

#### Burdekin

<b>Weekly production figures</b>		
<b>Burdekin region mills</b>		
<b>Week 5, ending 10 July 2021</b>		
<b>Cane crushed</b>	<b>This week</b>	<b>Season to date</b>
Invicta	150,070	685,796
Pioneer	79,484	354,552
Kalamia	71,267	332,864
Inkerman	71,880	279,512
<b>Burdekin</b>	<b>372,701</b>	<b>1,652,724</b>

Throughput for the Burdekin mills in week five was good with just over 370,000 tonnes of cane put through the rollers. This brings the season total to just over 1.65mln tonnes. This was a pleasing result given two factories lost time to unplanned stops. All factories crushed very well for the remainder of the week. Average weekly CCS was 14.06, above expectations due to the dry cool conditions.

[Wilmar](#) 12 July

<b>Weekly production figures</b>		
<b>Burdekin region mills</b>		
<b>Week 4, ending 03 July 2021</b>		
<b>Cane crushed</b>	This week	Season to date
Invicta	158,269	535,726
Pioneer	84,519	275,067
Kalamia	83,734	261,597
Inkerman	77,946	207,633
<b>Burdekin</b>	<b>404,468</b>	<b>1,280,023</b>

Throughput for the Burdekin mills in week four was good with just over 400,000 tonnes of cane put through the rollers. Ground conditions are improving with the fine dry weather. Forecast showers did not eventuate which was a relief as harvesters continue to look for suitably dry paddocks in the Inkerman area. Average weekly CCS was 13.71.

[Wilmar](#) 5 July

**Herbert**

<b>Weekly production figures</b>		
<b>Wilmar Sugar</b>		
<b>Herbert region mills</b>		
<b>Week 4, ending 10 July 2021</b>		
	This week	Season to date
<b>Cane crushed</b>		
Victoria	44,706	220,641
Macknade	31,641	96,314
<b>Total</b>	<b>76,347</b>	<b>316,955</b>
Crop forecast	4.38M	

Wet weather hampered harvesting operations for most of the week, limiting weekly throughput to 76,347 tonnes. Field conditions are slowly improving and harvesting operations are starting to increase across the Herbert region, although there are still some limitations due to wet ground conditions. CCS levels showed a slight improvement throughout the week, closing the week out at 12.4 units. Herbert region mills have crushed just under 317,000 tonnes of cane in total to date.

[Wilmar](#), 12 July

<b>Weekly production figures</b>		
<b>Wilmar Sugar Herbert region mills Week 3, ending 3 July 2021</b>		
	This week	Season to date
<b>Cane crushed</b>		
Victoria	62,090	175,935
Macknade	29,344	64,673
<b>Total</b>	<b>91,434</b>	<b>240,608</b>
Crop forecast	4.38M	

Persistent showers throughout the Herbert region brought Macknade Mill to a stop on Wednesday with Victoria Mill ceasing crushing Friday morning. As a result, crushing throughput was limited to 91,434 tonnes of cane for the week. CCS levels have been suppressed due to these wet conditions, with the weekly average at 11.68 units. Adequate cane supply was secured on Saturday to sustain a single milling train and the decision was made to re-start Macknade Mill. Wet field conditions and overcast conditions prevail. However, supply is expected to gradually increase with fine weather.

[Wilmar](#), 5 July

### Plane Creek

<b>Weekly production figures</b>		
<b>Wilmar Sugar Plane Creek Mill Week 4, Week ending 10 July 2021</b>		
	This week	Season to date
<b>Cane crushed</b>	52,711	189,831
Average bin weight	3.87	3.84
<b>CCS</b>	12.89	12.51

Plane Creek Mill crushed just under 53,000 tonnes of cane for the week, bringing the season total to nearly 190,000 tonnes. A planned maintenance stop on Wednesday then the factory operating at a reduced crushing rate until Saturday contributed to the lower weekly crush figure. CCS levels showed a marginal increase over the previous week of 0.19 of a unit, taking the season-to date CCS to 12.51 units.

[Wilmar](#) 12 July

<b>Weekly production figures</b>		
<b>Wilmar Sugar Plane Creek Mill Week 3, Week ending 3 July 2021</b>		
	This week	Season to date
<b>Cane crushed</b>	60,726	137,120
Average bin weight	3.79	3.83
<b>CCS</b>	12.70	12.36

Plane Creek Mill crushed just under 61,000 tonnes of cane for the week, bringing the season total to more than 137,000 tonnes. The factory performed well over the week with consistent crush rates and reasonable reliability. There was a lengthy cane supply shortfall stoppage early in the week following weekend rain. A further weather-related cane supply shortfall was experienced later in the week due to widespread showers on Saturday. The average weekly CCS increased by 0.55 of a unit taking the season to date CCS figure to 12.36 units.

[Wilmar](#) 5 July

### Proserpine

<b>Weekly production figures</b>		
<b>Wilmar Sugar Proserpine Mill Week 2, ending 10 July 2021</b>		
	This week	Season to date
Cane crushed	68,714	80,976
Average bin weight	9.52	9.47
CCS	13.73	13.60

Throughput for the week was 68,714 tonnes. The factory has now settled in and daily throughputs have been normal since Thursday. Average weekly CCS was 13.73 – an increase of 0.88 of a unit on the previous week.

[Wilmar](#) 12 July

<b>Weekly production figures</b>		
<b>Wilmar Sugar Proserpine Mill Week 1, ending 3 July 2021</b>		
	This week	Season to date
Cane crushed	12,262	12,262
Average bin weight	9.16	9.16
CCS	12.85	12.85

Proserpine Mill's 2021 crushing season commenced on Thursday, 1 July. Throughput for the first week was 12,262 tonnes. This was predominantly as a result of some initial equipment start-up commissioning. Wet weather conditions through the week didn't adversely interrupt harvesting and the CCS results have commenced well at 12.85 units.

[Wilmar](#) 5 July



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