

Harvest Update for the Australian Sugar Industry

Fortnight Ending 8 August 2021

Photo supplied by CANEGROWERS



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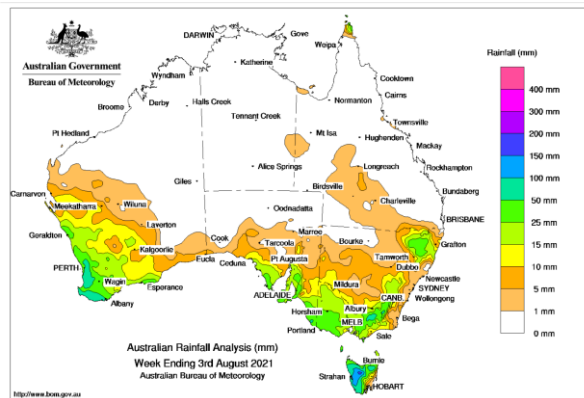
Editor: LINDSAY JOLLY

Australian Crush Finally in Full Swing

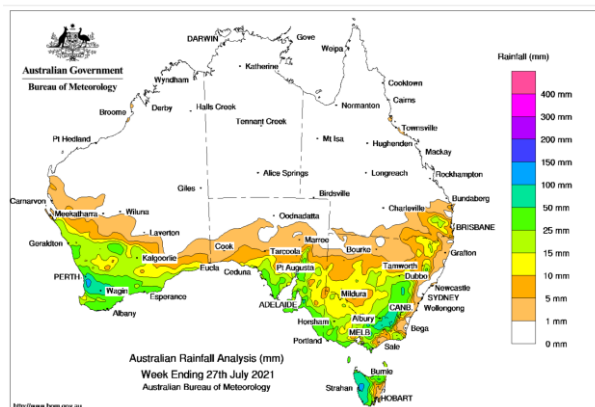
Australia’s crush finally has reached full swing during the fortnight ending 8 August (Week 10). The industry’s 22 mills [REDACTED]. Good weather ensured uninterrupted harvesting and mill performance was mostly good. All mills are crushing with the small Rocky Point mill in Queensland having started operations on 26 July. Week 9 and week 10 achieved a crush tally of [REDACTED] mln tonnes and [REDACTED] mln tonnes respectively, giving the crush a significant push forward. The fifth fortnight saw the cumulative Australian crush volume reach around [REDACTED] mln tonnes – almost one-third of the expected cane supply. The comparable figure last season was lower at [REDACTED] mln tonnes, due to severe rain disturbances. Queensland’s to-date crush had reached [REDACTED] mln tonnes and NSW around [REDACTED] tonnes by the end of week 10. The to-date CCS level for the Australian industry remains comparatively high having averaged 13.12 units, well above 12.53 units associated with last season’s rain interrupted 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) are now expected to process close to [REDACTED] mln tonnes 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 anticipates that sugar production from the 2021 crush could reach around [REDACTED].

Rainfall totals map for the 7 days ending 9 am 3 August 2021



Rainfall totals map for the 7 days ending 9 am 27 July 2021



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

Fig. 1 Australia: Weekly Crush

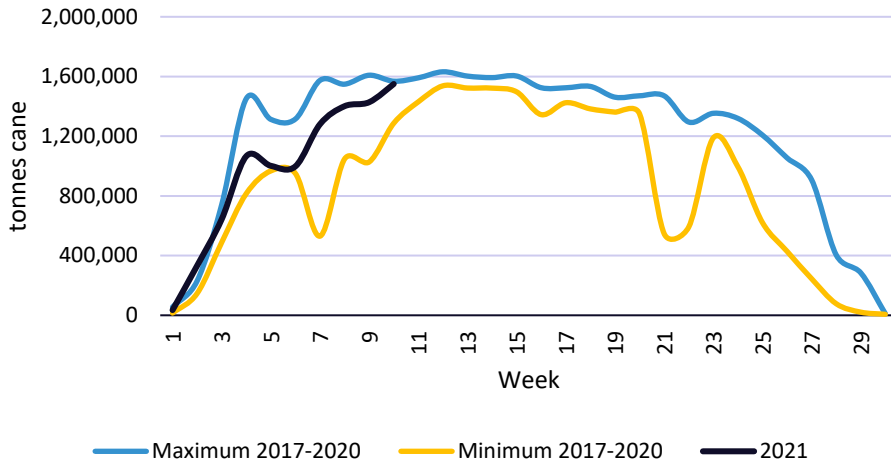


Fig. 2 Australia: Cumulative Weekly Crush

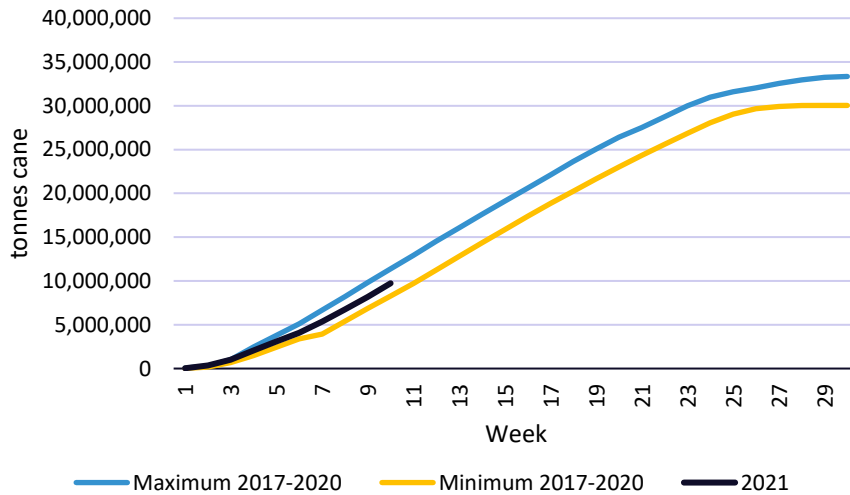
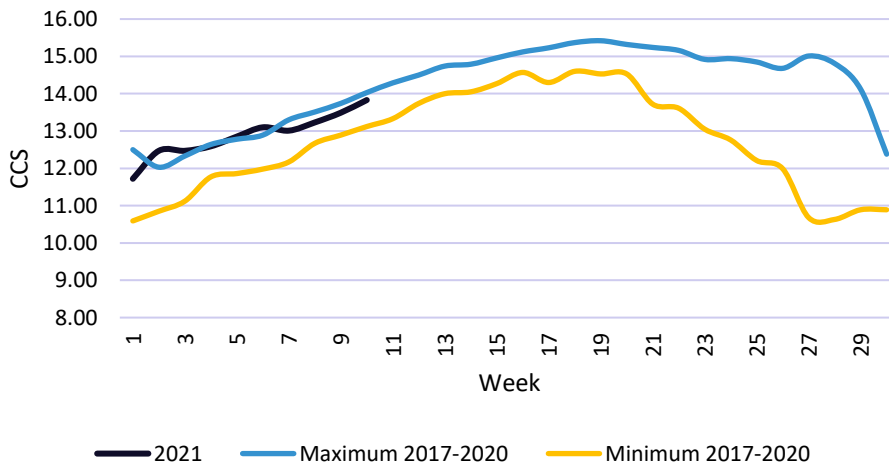


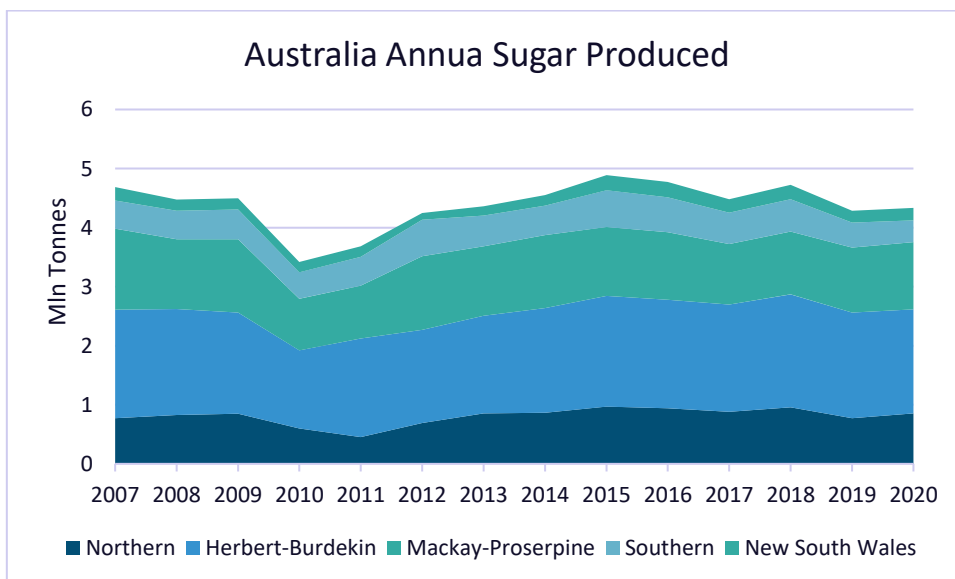
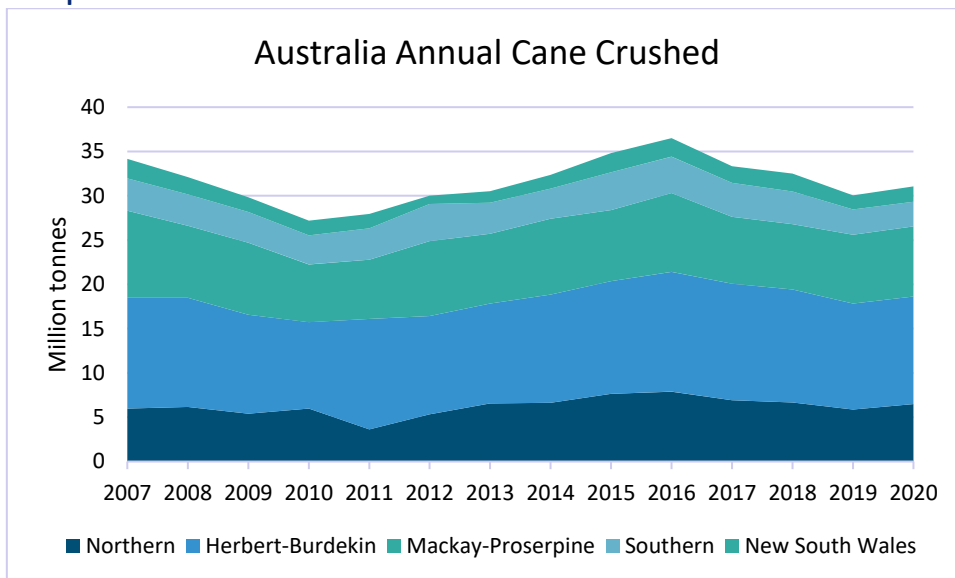
Fig. 3 Australia Weekly CCS



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
2021				
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	1,065,965	2,077,543	12.59	12.54
4/07/2021	1,001,447	3,078,991	12.85	12.59
11/07/2021	998,160	4,077,150	13.10	12.72
18/07/2021	████████	████████	██████	██████
25/07/2021	████████	████████	██████	██████
1/08/2021	████████	████████	██████	██████
8/08/2021	████████	████████	██████	██████
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
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
19/07/2020	1,410,548	5,278,842	12.84	12.28
26/07/2020	1,047,408	6,323,196	12.68	12.34
2/08/2020	1,027,462	7,350,657	12.89	12.42
9/08/2020	1,287,106	8,637,763	13.12	12.53

Source: ASMC, WKS Estimates.

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	291,638	485,428	189,332	35,709	1,002,107	63,858	1,065,965
4/07/2021	139,852	495,902	273,673	46,345	955,772	45,675	1,001,447
11/07/2021							
18/07/2021							
25/07/2021							
1/08/2021							
8/08/2021							

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	495,668	1,024,729	369,555	35,709	1,925,661	151,882	2,077,543
4/07/2021	635,521	1,520,631	643,228	82,054	2,881,434	197,557	3,078,991
11/07/2021	789,479	1,969,679	969,709	114,605	3,843,472	233,678	4,077,150
18/07/2021							
25/07/2021							
1/08/2021							
8/08/2021							

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	12.02	13.02	12.26	12.64	12.57	11.60	12.59
4/07/2021	12.32	13.33	12.59	12.74	12.95	10.89	12.85
11/07/2021	11.95	13.78	13.00	12.97	13.20	10.61	13.10
18/07/2021							
25/07/2021							
1/08/2021							
8/08/2021							

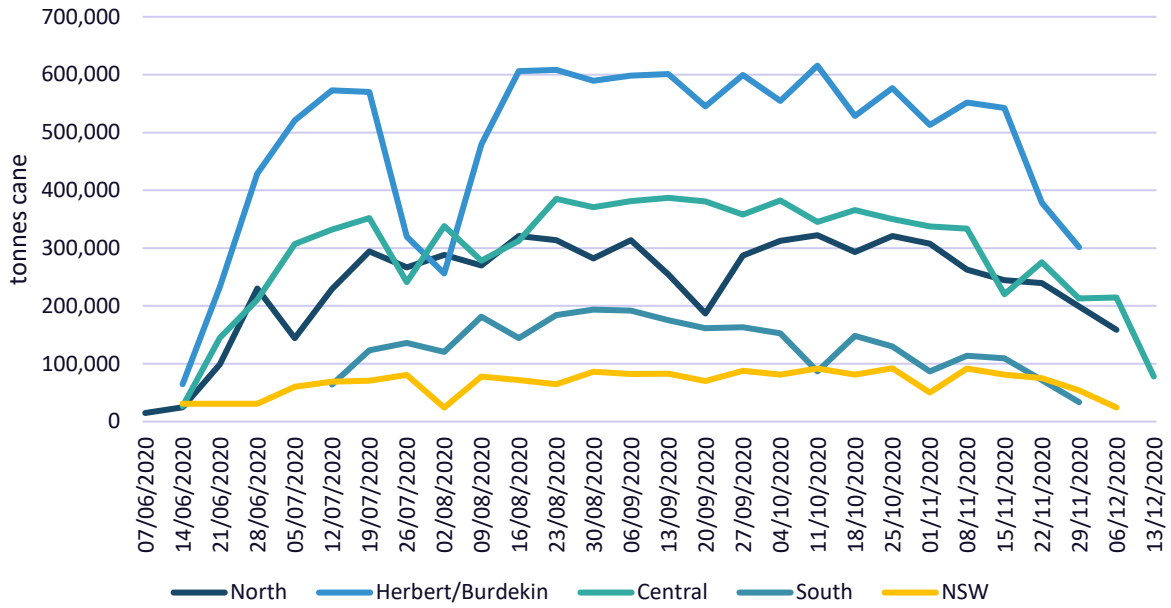
Source: ASMC, WKS Estimates.

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

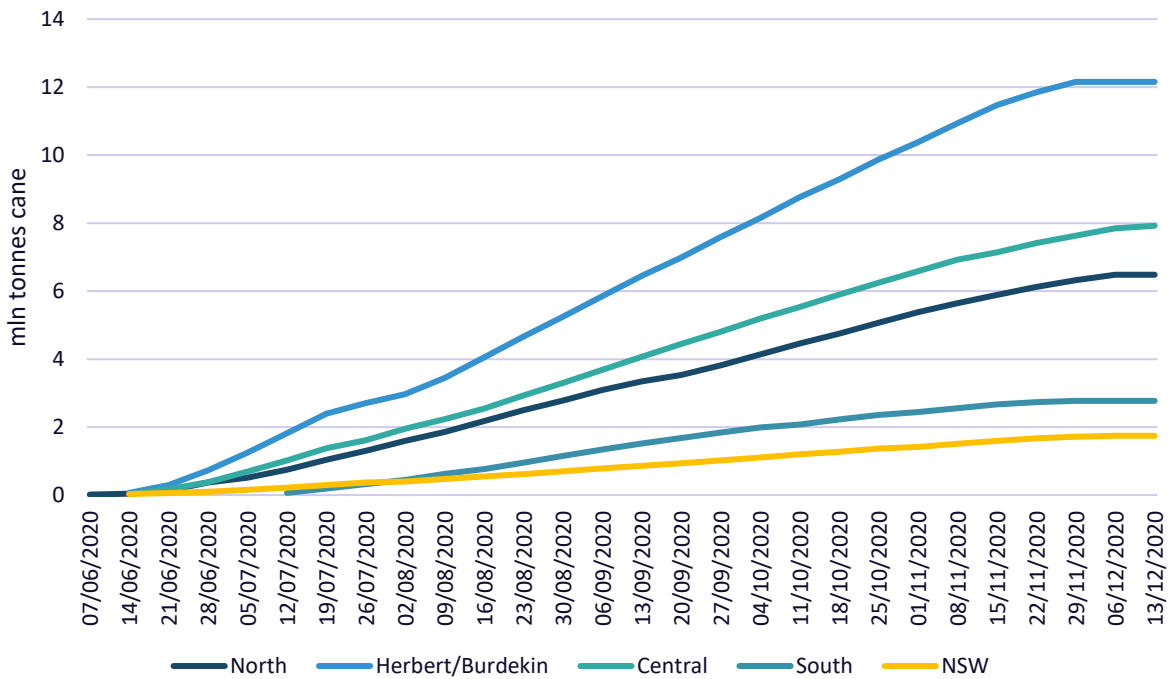
Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	12.35	-	10.93	-	11.72	-	11.72
13/06/2021	12.70	12.85	11.52	-	12.52	11.11	12.39
20/06/2021	12.25	12.94	11.71	-	12.55	11.36	12.44
27/06/2021	12.12	12.98	11.99	12.64	12.56	11.46	12.54
4/07/2021	12.16	13.09	12.24	12.68	12.69	11.23	12.59
11/07/2021	12.12	13.25	12.50	12.67	12.81	11.13	12.72
18/07/2021							
25/07/2021							
1/08/2021							
8/08/2021							

Source: ASMC, WKS Estimates.

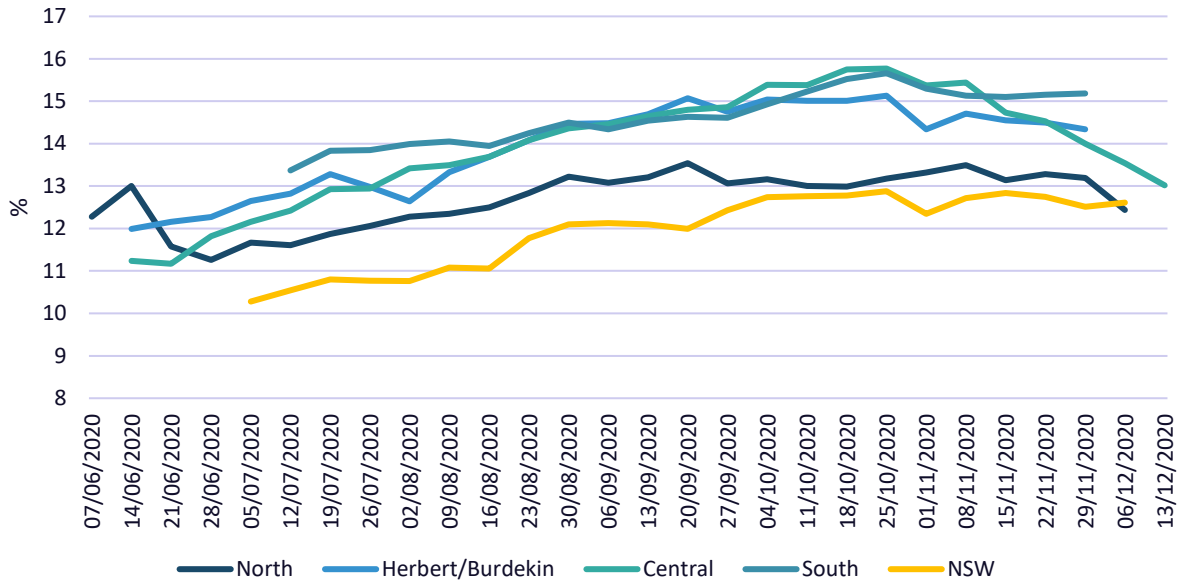
Weekly Crush by Region 2020



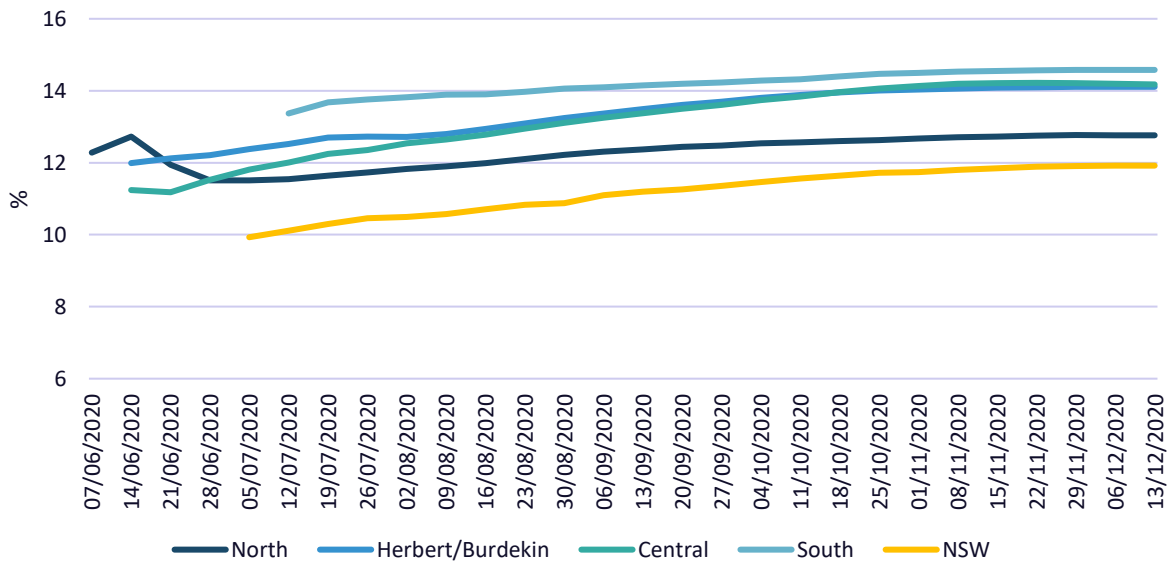
Cumulative Weekly Crush by Region 2020



Weekly CCS Content by Region 2020



Cumulative CCS Content by Region 2020





PRESS REPORT

Sugar Industry AUD 1 Bln Hit From India’s Sugar Subsidies

New analysis has calculated an AUD 1 bln cost to the Queensland sugar industry from Indian Government price and export subsidies currently under investigation by the World Trade Organisation (WTO). The finding has alarmed but not surprised peak industry organisations the Australian Sugar Green Pool report “Indian Sugar –The Impact of Over-production on Sugar Industry Revenues”

[CANEGROWERS](#) 15 July

Wilmar Production Reports

Burdekin

Weekly production figures		
Burdekin region mills		
Week 9, ending 07 August 2021		
Cane crushed	This week	Season to date
Invicta	163,153	1,302,078
Pioneer	89,274	698,328
Kalamia	84,527	643,676
Inkerman	88,790	529,603
Burdekin	425,744	3,173,685

The Burdekin mills crushed more than 425,000 tonnes of cane for the week – the highest weekly throughput so far this season. Invicta, Kalamia and Inkerman all posted the highest throughputs for the year. Pioneer fell just shy of another 90,000 tonne week. Kalamia recorded the best weekly throughput since 2005. Cane continues to be transferred out of the Inkerman area to Pioneer and Invicta mills for processing. Total throughput for the season to date is now just over 3 mln tonnes. Average weekly CCS was 14.96 which is now nearly 0.5 units above budget.

[Wilmar](#) 9 August

Weekly production figures		
Burdekin region mills		
Week 8, ending 31 July 2021		
Cane crushed	This week	Season to date
Invicta	161,010	1,138,875
Pioneer	82,181	609,054
Kalamia	81,446	559,149
Inkerman	54,332	440,813
Burdekin	378,969	2,747,891

Throughput for the week was just under 380,000 tonnes. This was above budget even though Inkerman Mill did not come back online until Tuesday, following corrective work to the steam-water separators in the boiler drum. Invicta Mill recorded the best weekly throughput for the year, of just over 160,000 tonnes. Total throughput for the season to date is now just under 2.75 mln tonnes. Average weekly CCS was 14.78 which is now nearly 0.5 units above budget.

[Wilmar](#) 2 August

Herbert

Weekly production figures		
Wilmar Sugar Herbert region mills Week 8, ending 8 August 2021		
	This week	Season to date
Cane crushed		
Victoria	131,013	717,502
Macknade	70,761	343,360
Total	201,774	1,060,862
Crop forecast	3.97M	

The Herbert mills crushed almost 202,000 tonnes of cane for the week and have now passed the milestone for the first million tonnes crushed for 2021. More than a quarter of the newly re-estimated Herbert crop has now been processed. There was an increase of 0.34 of a unit in CCS for the second consecutive week in a row to take the season-to-date average to 12.37 units.

[Wilmar](#) 9 August

Weekly production figures		
Wilmar Sugar Herbert region mills Week 7, ending 31 July 2021		
	This week	Season to date
Cane crushed		
Victoria	138,856	586,489
Macknade	63,096	272,599
Total	201,952	859,088
Crop forecast	4.38M	

The Herbert mills crushed about 202,000 tonnes of cane for the week, taking the season total to just over 859,000 tonnes. Victoria Mill undertook a 12-hour A-side maintenance stop on Tuesday and Macknade Mill had a 12-hour maintenance stop on Thursday. There was a slight increase of 0.34 of a unit in CCS levels on the previous week. The season-to-date CCS is tracking below the budgeted 12.9 units.

[Wilmar](#), 2 August

Plane Creek

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 8, Week ending 7 August 2021		
	This week	Season to date
Cane crushed	67,510	445,109
Average bin weight	4.00	3.93
CCS	14.47	13.34

Plane Creek Mill crushed just over 67,500 tonnes of cane for the week, bringing the season total more than 445,000 tonnes.. There was a modest 0.35 of unit improvement in CCS over the previous week, taking the season-to-date CCS to 13.34 units.

[Wilmar](#) 9 August

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 7, Week ending 31 July 2021		
	This week	Season to date
Cane crushed	58,680	377,599
Average bin weight	4.00	3.91
CCS	14.12	13.14

Plane Creek Mill crushed nearly 59,000 tonnes of cane for the week, bringing the season total more than 377,000 tonnes. Throughput was disrupted on Monday to enable repairs to No. 3 mill inter-carrier and a condensate pump. The planned 12-hour cleaning intermission on Tuesday was extended by three hours to finalise the inter-carrier repairs. Average weekly CCS jumped by almost half a unit to 14.12. This helped to push the season-to-date CCS above 13 units for the first time this season, closing out at 13.14 units..

[Wilmar](#) 2 August

Proserpine

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 6, ending 7 August 2021		
	This week	Season to date
Cane crushed	92,370	431,127
Average bin weight	9.60	9.30
CCS	14.61	14.03

Throughput for the week was above budget, with more than 92,000 tonnes of sugarcane crushed. The dry weather conditions are favourable for the harvesting and milling sectors, however some districts would benefit from top-up rain. Average weekly CCS jumped again to 14.61 – slightly more than a full unit above budget. This has pushed the season-to-date CCS above 14 units for the first time this crushing season.

[Wilmar](#) 9 August

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 5, ending 31 July 2021		
	This week	Season to date
Cane crushed	81,985	338,757
Average bin weight	9.72	9.59
CCS	14.38	13.87

Throughput for the week was above expectations, with 88,633 tonnes of sugarcane crushed. Field conditions have been favourable for harvesting contractors to deliver a good supply of cane. Both the harvesting sector and factory are settling into a regular rhythm. Average weekly CCS was 13.66.

[Wilmar](#) 2 August



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