

Harvest Update for the Australian Sugar Industry

Fortnight Ending 19 September 2021

Photo supplied by CANEGROWERS



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Editor: LINDSAY JOLLY

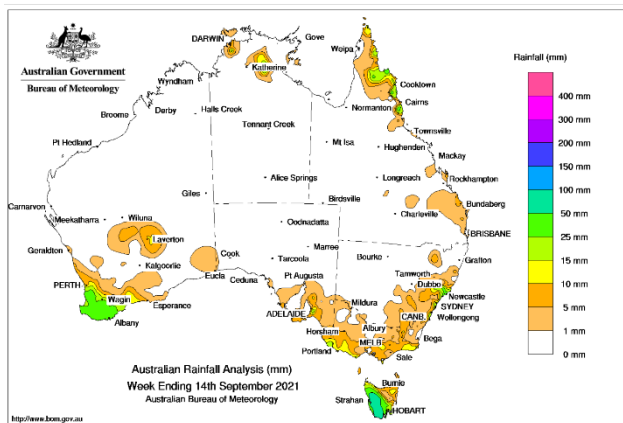
No rain: Australian Cane Crush Pace Rebounds

The impacts of the significant wet weather event that interrupted the cane harvest- seeing fields too wet to harvest and many mills idled during the fortnight ending 6 September - **have thankfully dissipated**. The weekly crush tally for the Australian industry’s 22 mills **rebounded to 1.2** million tonnes in week 16 (fortnight ending 19 September), up from **0.8** mln the previous week and **rebounded from** the disastrous level of only **0.2** mln tonnes seen when the rain event hit in week 14. The harvest is now lagging behind, with **only 60%** of the estimated available tonnage crushed. The eight fortnight saw the cumulative Australian crush volume reach **10.5** mln tonnes. The comparable figure last season was **11.5** mln tonnes, **down 9%**. Queensland’s to-date crush had reached **4.5** mln tonnes and the NSW industry has slightly surpassed 1 mln tonnes at the end of week 16. The to-date CCS level for the Australian industry remains **13.28** units, as against 13.28 units at the same time last season.

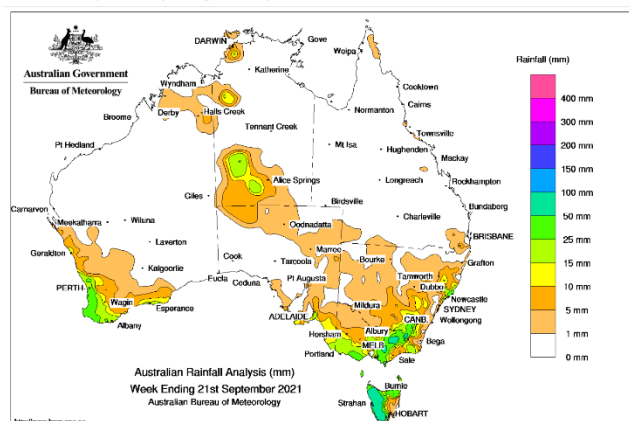
But Crop Prospects Downgraded

The ASMC has lowered its estimate for Australia’s cane crush down to **10.5** mln tonnes as against their initial estimate of **12.5** mln tonnes. Consequently, this year’s crush is expected to shrink as against last season’s tally of **11.5** mln tonnes. Even if the crush can continue unimpeded over the coming weeks – allowing solid harvest progress with better sugar yields - WKS anticipates **10.5** mln tonnes.

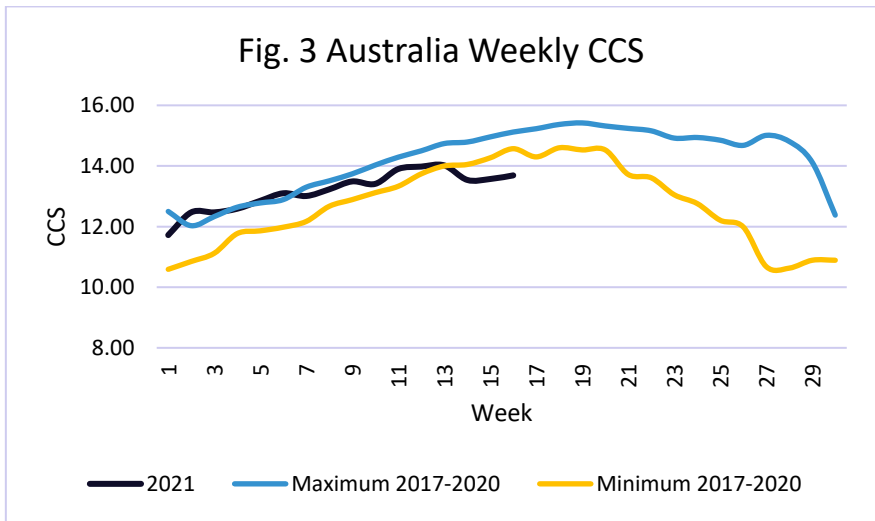
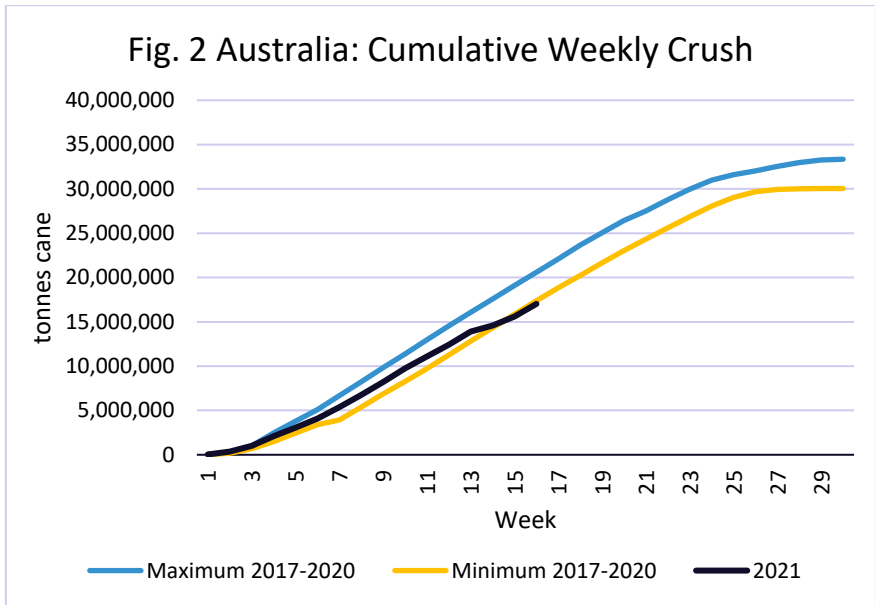
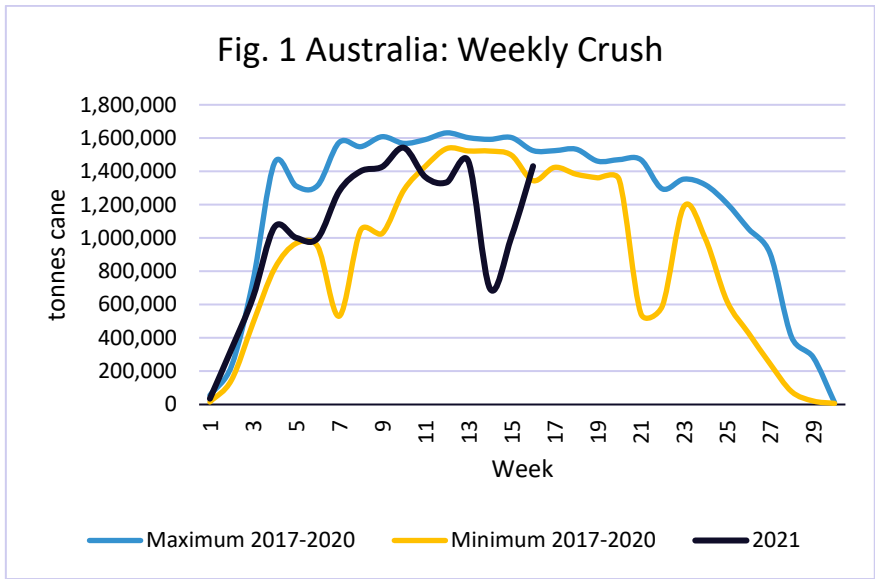
Rainfall totals map for the 7 days ending 9 am 14 September 2021



Rainfall totals map for the 7 days ending 9 am 21 September 2021



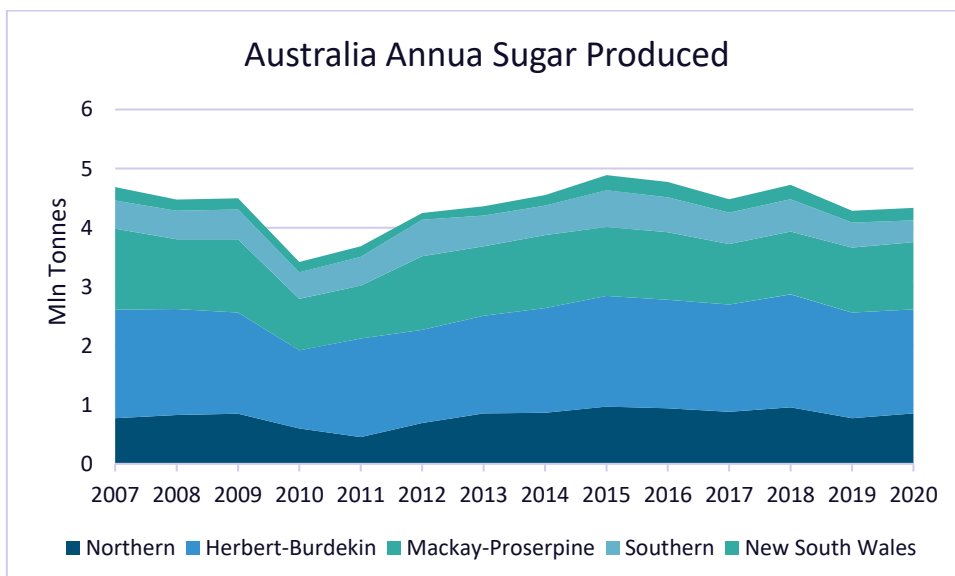
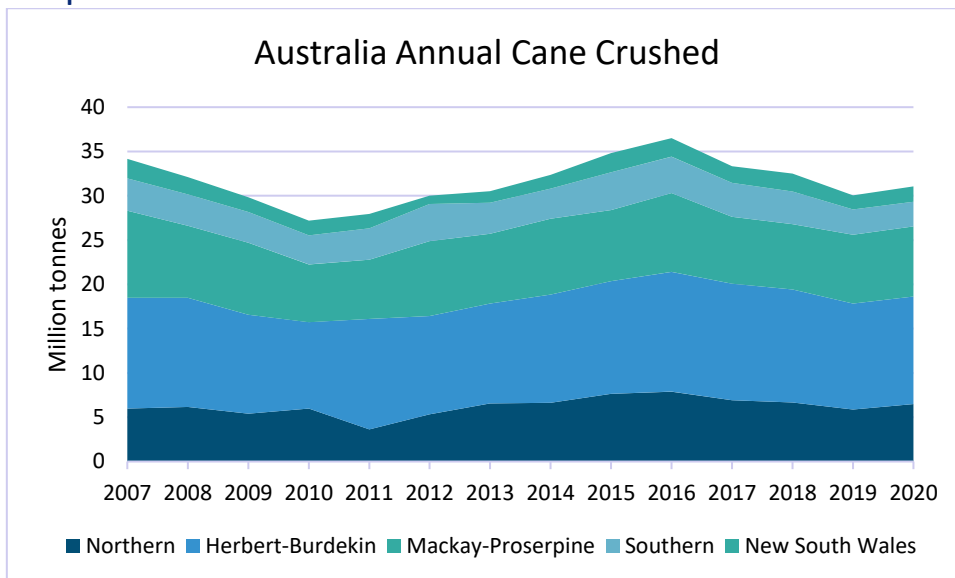
<http://www.bom.gov.au/climate/rainfall/>



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	1,280,541	5,357,693	13.01	12.79
25/07/2021	1,401,096	6,758,789	13.23	12.89
1/08/2021	1,427,840	8,186,630	13.49	12.99
8/08/2021	1,542,168	9,728,798	13.83	13.12
15/08/2021	████████	████████	██████	██████
22/08/2021	████████	████████	██████	██████
29/08/2021	████████	████████	██████	██████
5/09/2021	████████	████████	██████	██████
12/09/2021	████████	████████	██████	██████
19/09/2021	████████	████████	██████	██████
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
14/08/2020	1,455,860	10,093,546	13.33	12.64
21/08/2020	1,555,530	11,649,076	13.76	12.79
28/08/2020	1,522,689	13,171,765	14.08	12.84
4/09/2020	1,567,250	14,739,017	14.05	13.06
11/09/2020	1,500,970	16,239,986	14.27	13.17
18/09/2020	1,344,471	17,584,458	14.57	13.28

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	153,957	449,048	326,482	32,551	962,038	36,122	998,160
18/07/2021	228,340	513,877	368,724	98,371	1,209,312	71,229	1,280,541
25/07/2021	306,392	542,502	376,778	97,256	1,322,928	78,168	1,401,096
1/08/2021	298,575	580,971	350,804	123,007	1,353,357	74,483	1,427,840
8/08/2021	330,144	627,518	388,031	125,004	1,470,697	71,471	1,542,168
15/08/2021	224,250	578,098	361,718	125,003	1,289,069	77,190	1,366,259
22/08/2021							
29/08/2021							
5/09/2021							
12/09/2021							
19/09/2021							

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	1,017,821	2,483,556	1,338,433	212,976	5,052,786	304,907	5,357,693
25/07/2021	1,324,213	3,026,058	1,715,211	310,232	6,375,714	383,075	6,758,789
1/08/2021	1,622,788	3,607,029	2,066,015	433,240	7,729,072	457,558	8,186,630
8/08/2021	1,952,932	4,234,547	2,454,046	558,244	9,199,769	529,029	9,728,798
15/08/2021	2,177,182	4,812,645	2,815,764	683,247	10,488,838	606,219	11,095,057
22/08/2021							
29/08/2021							
5/09/2021							
12/09/2021							
19/09/2021							

Source: ASMC, WKS Estimates.

Table 4: Australian CCS Content by Region (%)

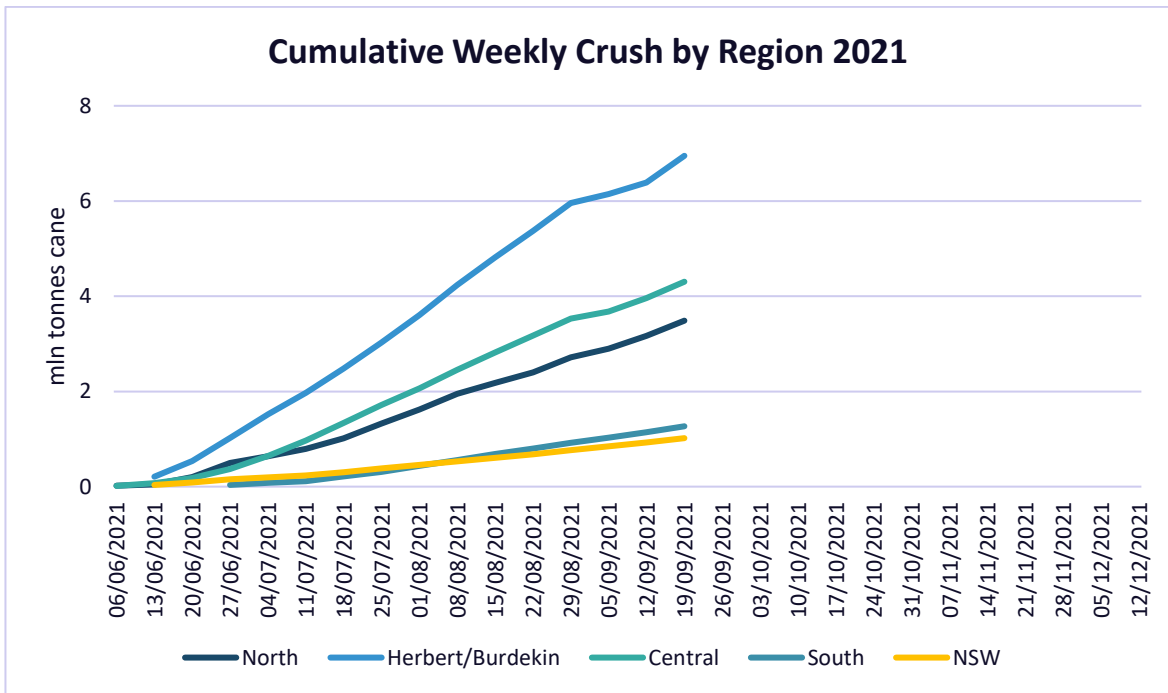
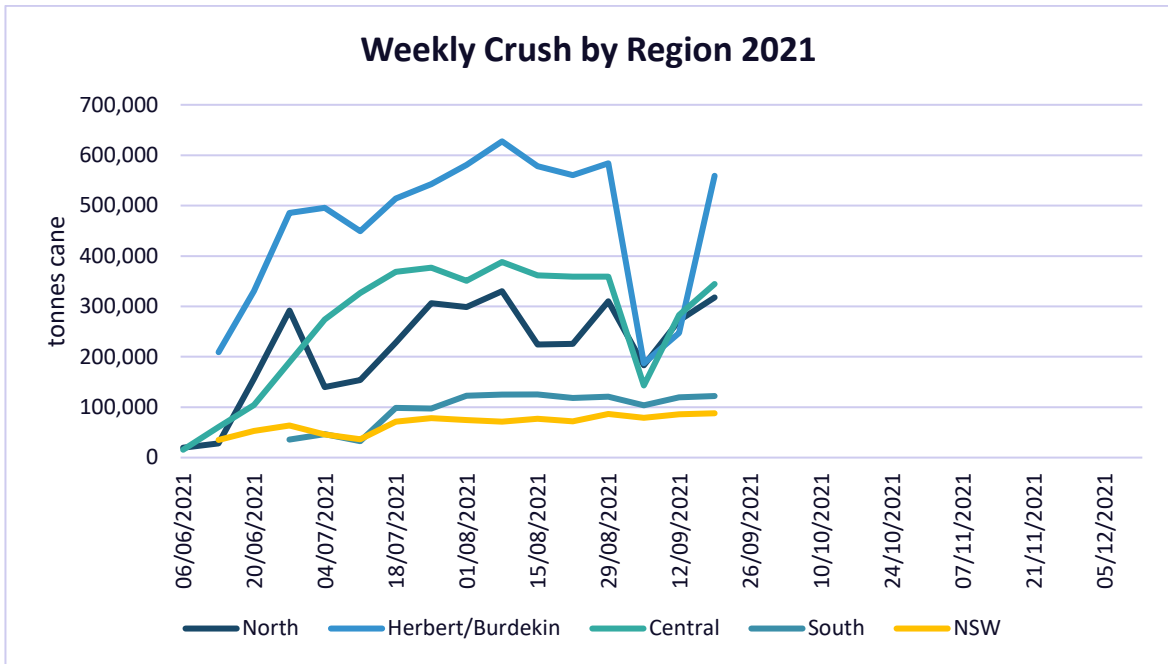
Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	12.35	-	10.93	-	11.72	-	11.72
13/06/2021	13.01	12.85	11.67	-	12.62	11.11	12.47
20/06/2021	12.11	13.00	11.84	-	12.56	11.51	12.47
27/06/2021	12.02	13.02	12.26	12.64	12.57	11.60	12.59
4/07/2021	12.32	13.33	12.59	12.74	12.95	10.89	12.85
11/07/2021	11.95	13.78	13.00	12.97	13.20	10.61	13.10
18/07/2021	11.71	13.66	13.32	13.04	13.14	10.91	13.01
25/07/2021	12.28	13.68	13.65	13.31	13.32	11.73	13.23
1/08/2021	12.27	14.02	13.98	13.33	13.56	12.18	13.49
8/08/2021	12.66	14.31	14.33	13.71	13.90	12.40	13.83
15/08/2021	12.73	14.27	14.38	13.74	13.98	12.52	13.90
22/08/2021							
29/08/2021							
5/09/2021							
12/09/2021							
19/09/2021							

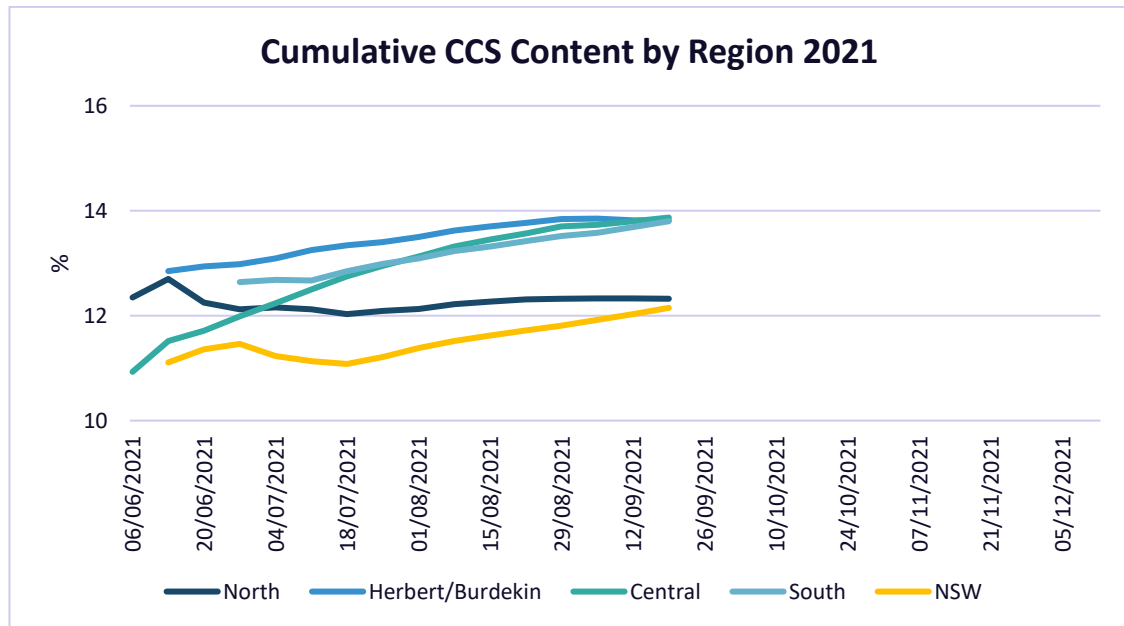
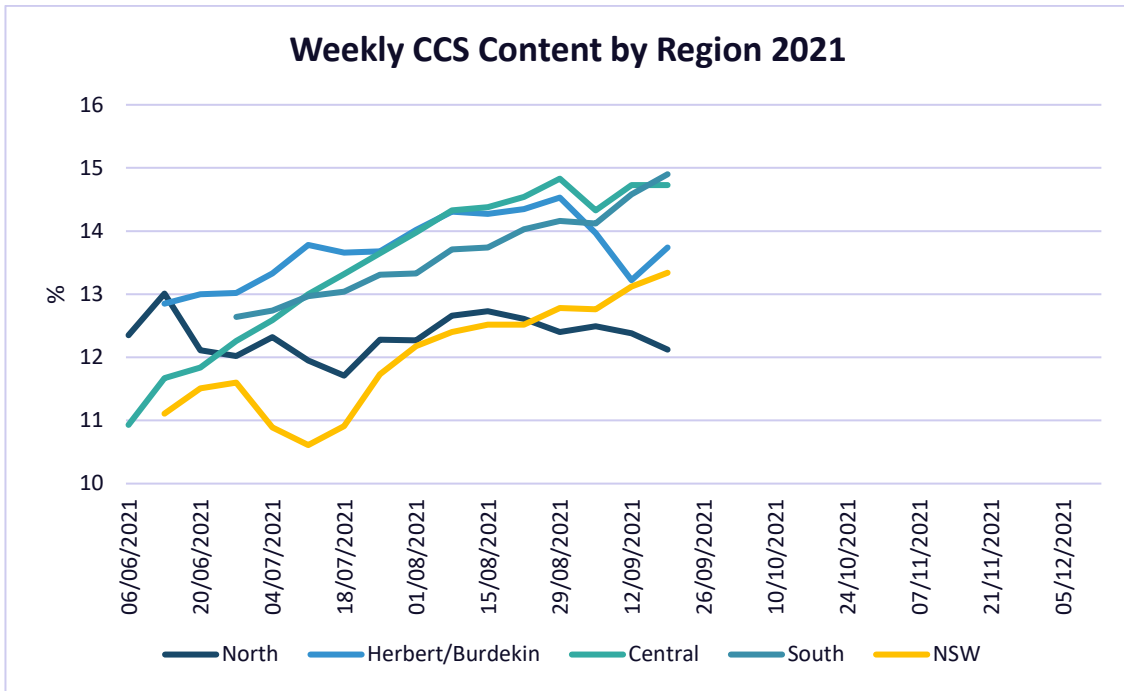
Source: ASMC, WKS Estimates.

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	12.03	13.34	12.75	12.85	12.90	11.08	12.79
25/07/2021	12.09	13.40	12.95	12.99	12.99	11.21	12.89
1/08/2021	12.13	13.50	13.13	13.09	13.09	11.38	12.99
8/08/2021	12.22	13.62	13.32	13.23	13.22	11.52	13.12
15/08/2021	12.27	13.70	13.45	13.32	13.31	11.62	13.22
22/08/2021							
29/08/2021							
5/09/2021							
12/09/2021							
19/09/2021							

Source: ASMC, WKS Estimates.







PRESS REPORT

‘Sweeter’ sugar outlook takes Queensland farmer confidence to 18-month high

A ‘sweeter’ sugar price has helped fuel an upswing in Queensland farmer confidence, with sentiment in the state’s ag sector reaching an 18-month high, the latest quarterly Rabobank Rural Confidence Survey has found. The survey found close to two-thirds of the state’s sugar producers are expecting conditions to improve in the year ahead, the most positive outlook for the sector in 12 years. In the sugar sector, 33 per cent of growers are intending to increase investment in their businesses, up from 24 per cent last quarter. For Queensland’s cotton and grain sectors, 44 per cent and 43 per cent of producers, respectively, are planning to increase investment, with 37 per cent in beef also holding that intention.

[Mirage News](#) 14 September

Wilmar Production Reports

Burdekin

Weekly production figures		
Burdekin region mills		
Week 15, ending 18 September 2021		
Cane crushed	This week	Season to date
Invicta	130,772	1,911,283
Pioneer	63,927	1,038,113
Kalamia	81,298	1,005,131
Inkerman	85,089	919,747
Burdekin	361,086	4,874,274

Good throughput this week saw just over 360,000 tonnes of cane crushed. This was just below budget even though Invicta and Pioneer did not restart crushing operations until Monday, following the recent wet weather stop. Inkerman recorded its third highest throughput for the year. Wet ground conditions are still causing problems with harvesting in some areas Average weekly CCS was 14.35, which is below budget due to the effects of the wet conditions.

[Wilmar](#) 20 September

Weekly production figures		
Burdekin region mills		
Week 14, ending 11 September 2021		
Cane crushed	This week	Season to date
Invicta	0	1,780,511
Pioneer	0	974,186
Kalamia	22,345	923,833
Inkerman	35,053	834,658
Burdekin	57,398	4,513,188

Crushing resumed at Inkerman and Kalamia mills last week after rain brought harvesting to a standstill the previous week. Inkerman restarted on Thursday and put through just over 35,000 tonnes of cane. Kalamia restarted on Friday and put through just over 22,000 tonnes. Invicta and Pioneer mills are on track to restart on Monday, 13 September. Ground conditions remain damp in some areas but are drying out well. Average weekly CCS was 14.66, which is below budget.

[Wilmar](#) 13 September

Herbert

Weekly production figures		
Wilmar Sugar Herbert region mills Week 14, ending 19 September 2021		
	This week	Season to date
Cane crushed		
Victoria	129,376	1,413,700
Macknade	68,355	661,851
Total	197,731	2,075,551
Crop forecast	3.97M	

The Herbert mills have now passed the halfway mark for the 2021 crush, with the 2 mln tonnes milestone reached on the morning of Friday 17 September. The total weekly throughput was just shy of 180,000 tonnes of cane. An external power outage early in the week caused a disruption to crushing operations at Macknade Mill. There was a slight decrease in CCS levels from the previous week, with the season to date average remaining below budget at 12.61 units.

[Wilmar](#) 20 September

Weekly production figures		
Wilmar Sugar Herbert region mills Week 13, ending 11 September 2021		
	This week	Season to date
Cane crushed		
Victoria	135,868	1,284,324
Macknade	53,905	593,496
Total	189,773	1,877,820
Crop forecast	3.97M	

Intermittent rain events continue to disrupt harvesting and crushing operations this season. Just under 190,000 tonnes of cane was processed for the week, which is a good result given Macknade Mill stopped crushing for two days due to wet weather. CCS levels remain below budget with the season-to-date CCS sitting at 12.61 units.

[Wilmar](#), 13 September

Plane Creek

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 14, Week ending 18 September 2021		
	This week	Season to date
Cane crushed	53,793	752,503
Average bin weight	4.00	3.96
CCS	15.22	14.02

Plane Creek Mill crushed just shy of 54,000 tonnes of cane for the week, bringing the season total to more than 752,000 tonnes. CCS figures edged slightly higher by 0.01 of a unit over the previous week, to average 15.22 units. This pushed the season to date CCS past 14 units for the first time this year, closing out at 14.02 units.

[Wilmar](#) 20 September

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 13, Week ending 11 September 2021		
	This week	Season to date
Cane crushed	53,549	698,710
Average bin weight	3.91	3.95
CCS	15.21	13.92

Plane Creek Mill resumed crushing on Sunday afternoon following a rain event that stopped harvesting for several days. A total of 53,549 tonnes of cane was crushed for the week, taking the season total to just below 700,000 tonnes. The 50% milestone was reached on Friday evening. There was a welcome improvement in CCS of 0.35 of a unit over the previous week, taking the season-to-date CCS to just under 14 units.

[Wilmar](#) 13 September

Proserpine

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 12, ending 18 September 2021		
	This week	Season to date
Cane crushed	79,757	831,336
Average bin weight	9.62	9.59
CCS	14.55	14.34

Close to 80,000 tonnes of cane were crushed for the week. This was below budget due to the need for carry out some factory repairs early in the week. CCS for the week dropped to 14.55, which is below budget.

[Wilmar](#) 20 September

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 11, ending 11 September 2021		
	This week	Season to date
Cane crushed	75,365	751,578
Average bin weight	9.51	9.58
CCS	14.79	14.32

About 75,300 tonnes of cane were crushed for the week. This was below budget due to the recent wet weather event that disrupted harvesting operations until last Sunday. CCS for the week recovered to 14.79 – just above budget.

[Wilmar](#) 13 September



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