

Harvest Update for the Australian Sugar Industry

Fortnight Ending 6 September 2021

Photo supplied by CANEGROWERS

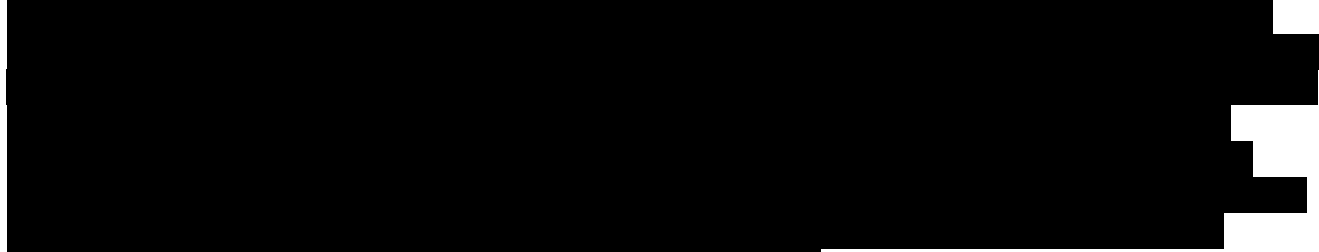


VOL 4 NO. 7
[9 SEPTEMBER 2021]

Editor: LINDSAY JOLLY

Wet Weather Brings Mills to a Halt – Australian Crush Pace Stalls

A significant wet weather event has interrupted the cane harvest, seeing fields too wet to harvest and many mills idled during the fortnight ending 6 September (Week 14).



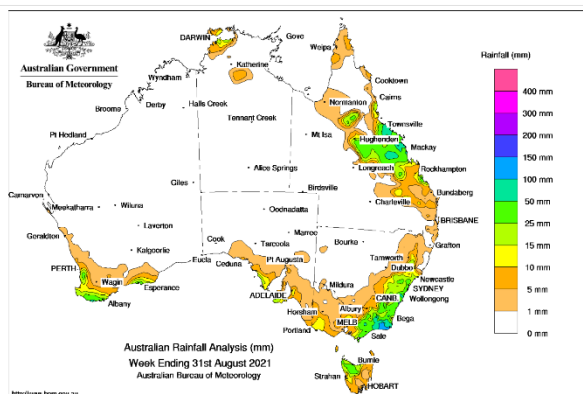
Only Queensland’s Southern region and New South Wales cane growing region were spared from the rain interruptions

The weekly crush tally for the industry’s 22 mills slumped to less than [redacted] mln tonnes in week 14, down from [redacted] mln tonnes the prior week. At the same time last season, the Australian industry was crushing around [redacted] mln tonnes weekly. The harvest is now lagging behind, with [redacted] of the estimated available tonnage crushed. The seventh fortnight saw the cumulative Australian crush volume reach [redacted] mln tonnes. The comparable figure last season was higher at [redacted] mln tonnes. This is the first time since the beginning of this year’s crush that the tally has fallen behind last year’s. Queensland’s to-date crush had reached [redacted] mln tonnes and NSW around [redacted] tonnes by the end of week 14. The to-date CCS level for the Australian industry remains comparatively high (despite the recent impact of wet weather) having averaged 13.38 units, as against 13.06 units at the same time last season. Even so, worryingly, average weekly CCS has stalled since week 10 and is now lagging levels normally expected at this stage of the harvest.

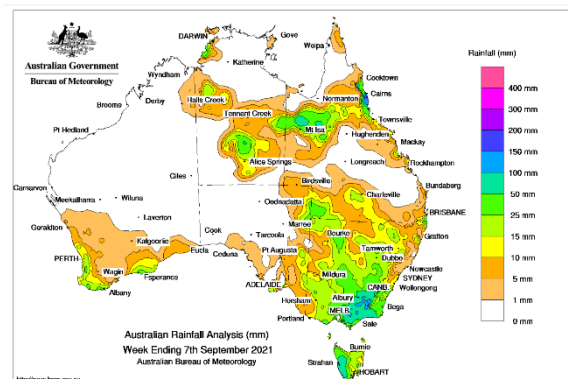
The rain likely means a higher cane tonnage over the remainder of the season, suggesting the current estimate of [redacted] mln tonnes may [redacted] slightly. However, much of the growth will be suckering, with low sugar content. On balance, there may be little net gain in sugar production over initial expectations. If the crush can continue unimpeded over the coming weeks – allowing solid harvest progress and good sugar recovery -



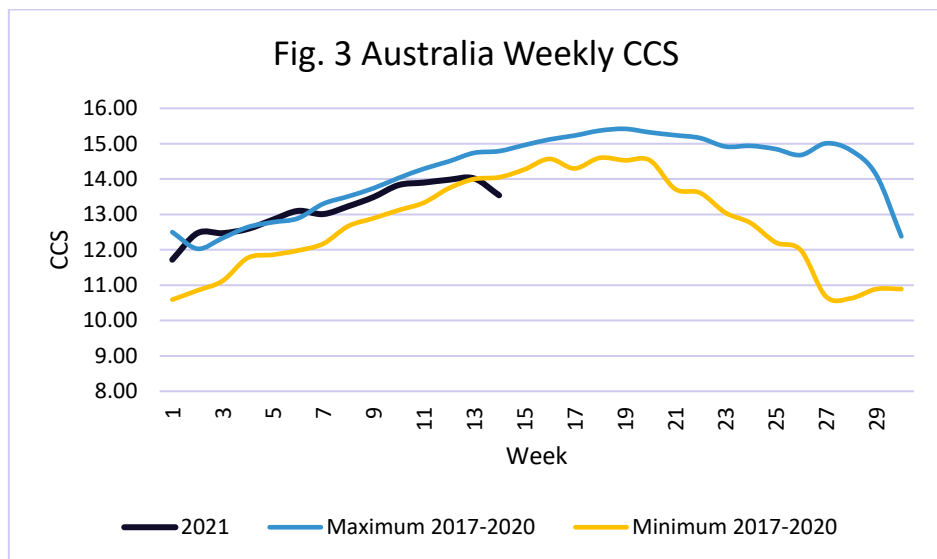
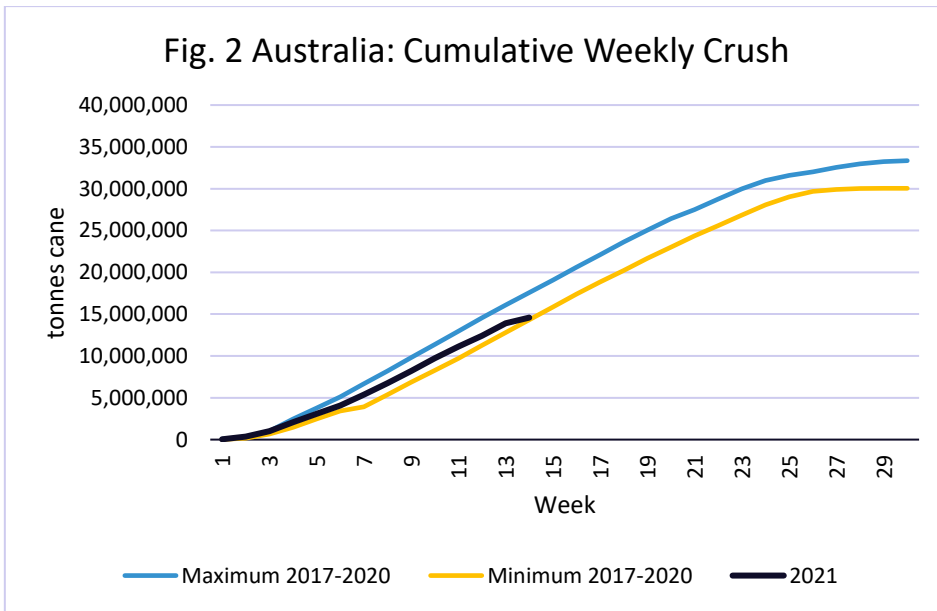
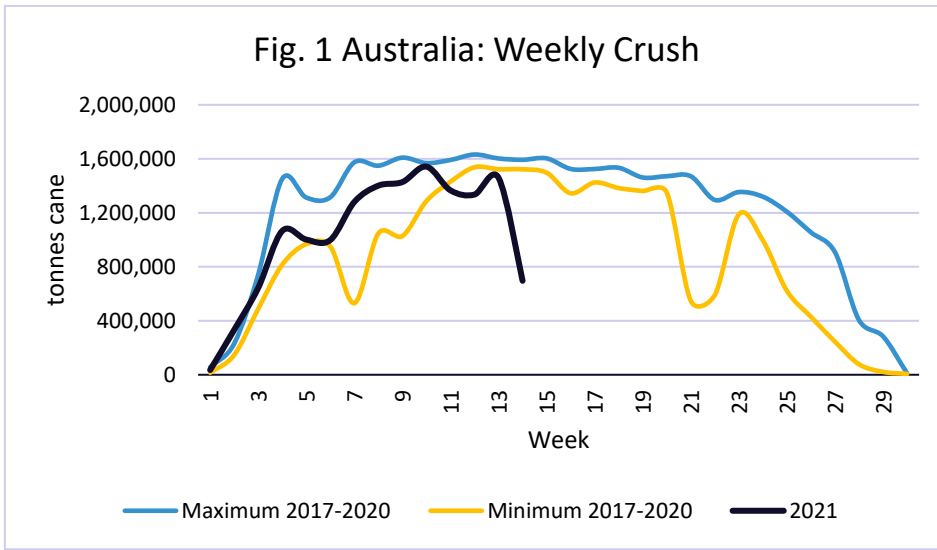
Rainfall totals map for the 7 days ending 9 am 31 August 2021



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



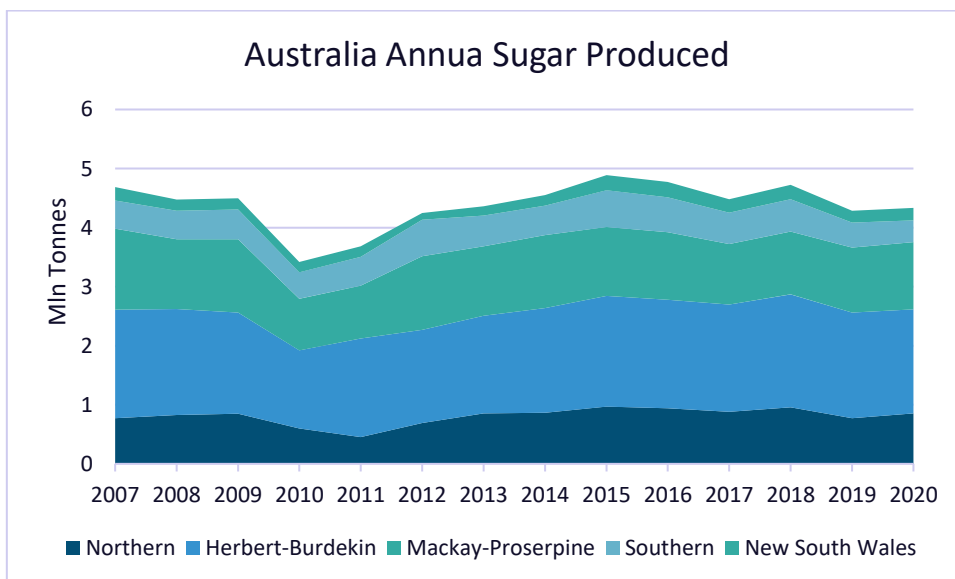
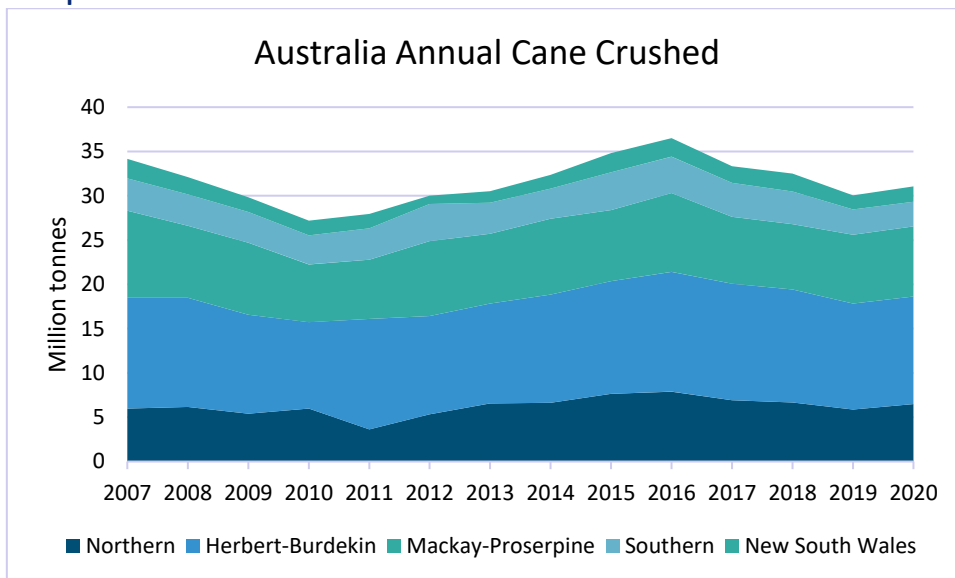
<http://www.bom.gov.au/climate/rainfall/>



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				
15/08/2021				
22/08/2021				
29/08/2021				
6/09/2021				
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
5/09/2020	1,567,250	14,739,017	14.05	13.06

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							
15/08/2021							
22/08/2021							
29/08/2021							
6/09/2021							

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							
15/08/2021							
22/08/2021							
29/08/2021							
6/09/2021							

Source: ASMC, WKS Estimates.

Table 4: Australian CCS Content by Region (%)

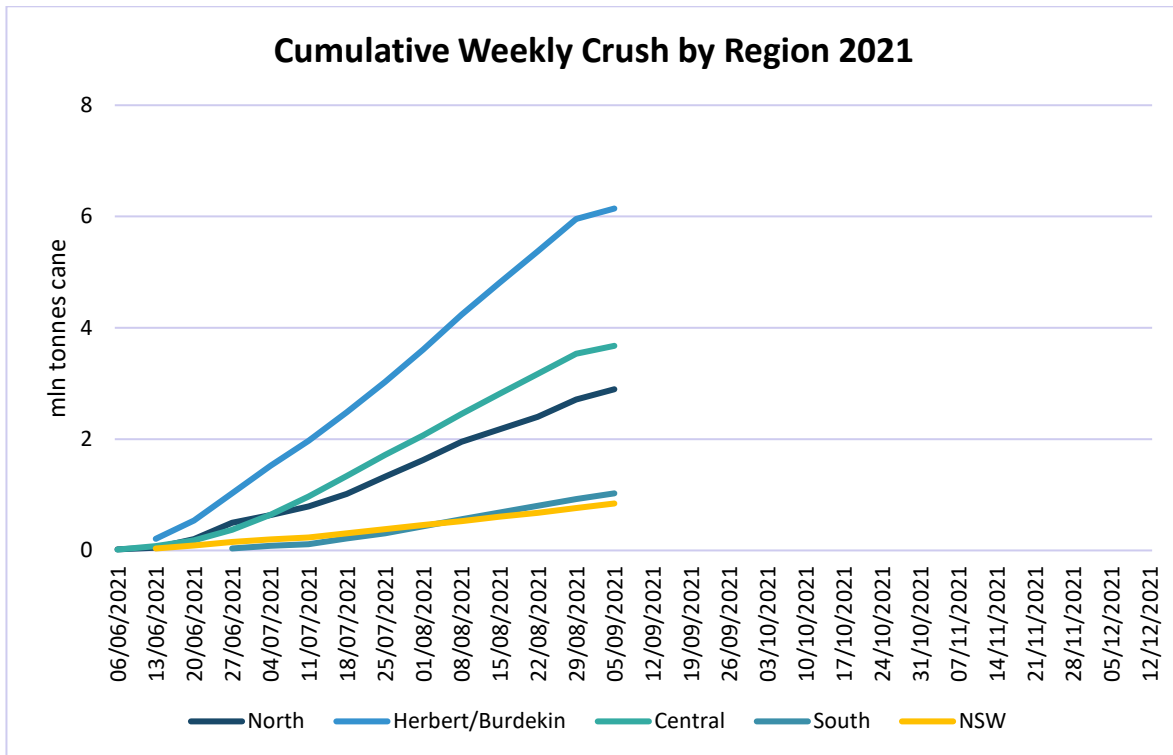
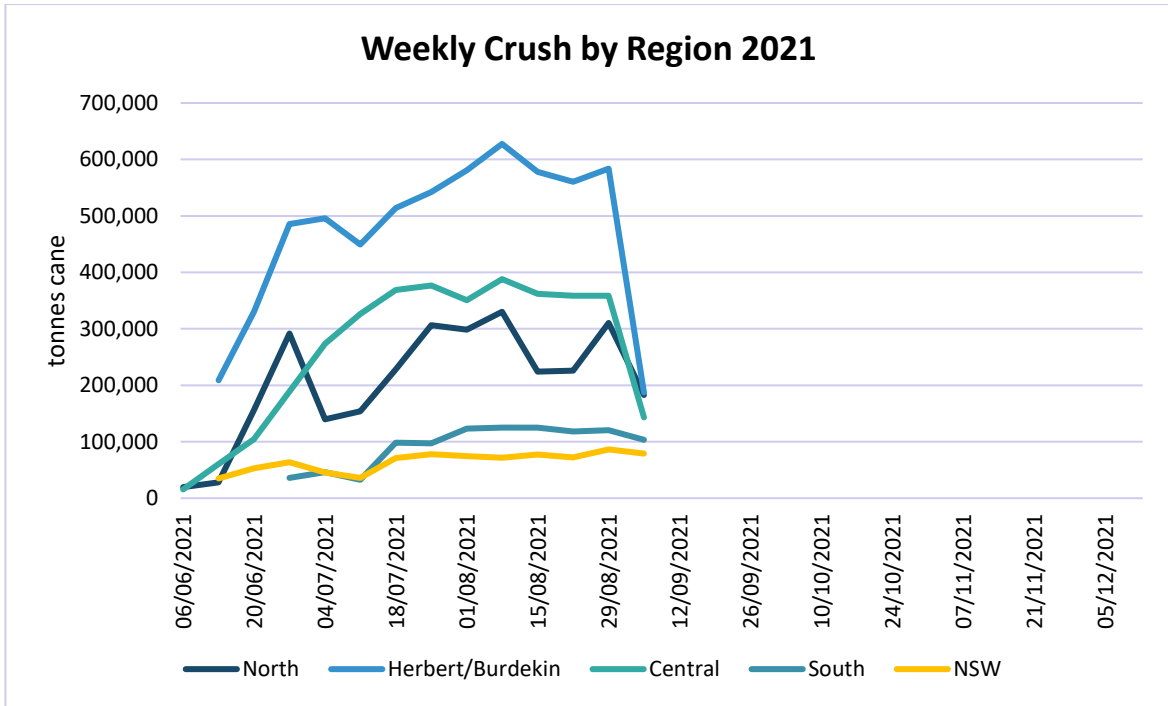
Week	North	Herbert/Burdekin	Central	South	Queensland	NSW	Australia
6/06/2021	12.35	-	10.93	-	11.72	-	11.72
13/06/2021	13.01	12.85	11.67	-	12.62	11.11	12.47
20/06/2021	12.11	13.00	11.84	-	12.56	11.51	12.47
27/06/2021	12.02	13.02	12.26	12.64	12.57	11.60	12.59
4/07/2021	12.32	13.33	12.59	12.74	12.95	10.89	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							
15/08/2021							
22/08/2021							
29/08/2021							
6/09/2021							

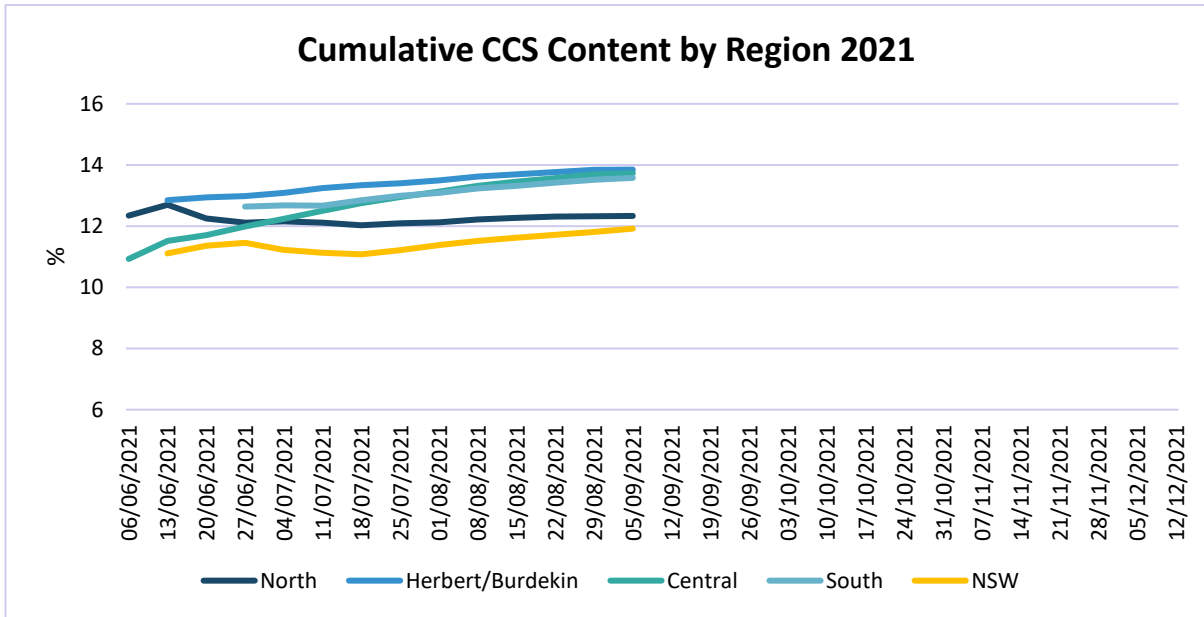
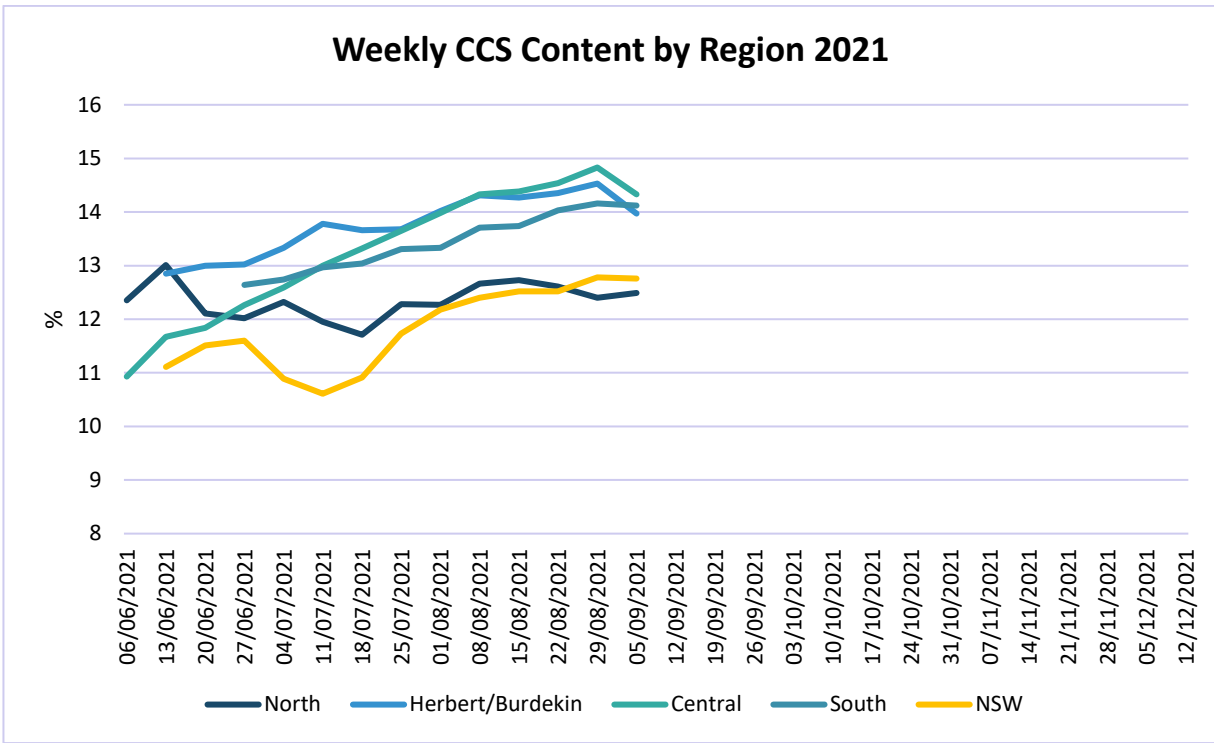
Source: ASMC, WKS Estimates.

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							
15/08/2021							
22/08/2021							
29/08/2021							
6/09/2021							

Source: ASMC, WKS Estimates.







PRESS REPORT

Wilmar Production Reports

Third Crushing Update for 2021

Wilmar reached the halfway mark for the 2021 crush on 31 August.

Their factories have collectively processed 7.44 mln tonnes of cane, or 50% of the estimated 14.88 million tonne crop.

HERBERT

CCS this week	Tonnes to date	% of total	Total Herbert Crop
12.70	1.65 mln	42	3.97 mln tonnes

- Wet weather continues to create challenges for the harvesting and milling sectors.
- The region has been impacted by rain in almost every week of the season to date, resulting in reduced throughputs and below-budget CCS.

BURDEKIN

CCS this week	Tonnes to date	% of total	Total Burdekin Crop
15.20	4.47 mln	56	7.97 mln tonnes

- The four Burdekin factories have maximised crush rates in recent weeks, putting the region ahead of budget for total tonnes crushed.
- CCS levels continue to track above budget and are approaching the seasonal peak.

PROSERPINE

CCS this week	Tonnes to date	% of total	Total Herbert Crop
14.66	673,000	42	1.59 mln tonnes

- Harvesting conditions have been predominantly favourable in recent weeks and CCS has continued to track above budget.

PLANE CREEK

CCS this week	Tonnes to date	% of total	Total Herbert Crop
14.94	645,000	48%	1.35 mln tonnes

- Crush rates are now being impacted by high CCS levels, as the pan stage becomes the rate limiting station.
- Overnight falls of between 50mm and 100mm have halted harvesting operations, and crushing is unlikely to resume until later this week.

[Wilmar](#) 31 August

Burdekin

Weekly production figures

Burdekin region mills		
Week 13, ending 04 September 2021		
Cane crushed	This week	Season to date
Invicta	21,662	1,780,511
Pioneer	24,807	974,186
Kalamia	22,825	901,488
Inkerman	25,056	799,605
Burdekin	94,350	4,455,790

Throughput for the week was just under 95,000 tonnes after widespread rain on Monday afternoon brought harvesting to a halt. All four mills crushed out on Tuesday and shut down. Falls of between 40 and 100mm were recorded across the district. With continued fine weather, harvesting is likely to resume by the end of this week. Maintenance teams have been taking advantage of the forced downtime to complete necessary work. Average weekly CCS was 14.97, which is below budget due to the rain.

[Wilmar](#) 4 September

Weekly production figures

Burdekin region mills		
Week 12, ending 28 August 2021		
Cane crushed	This week	Season to date
Invicta	156,993	1,758,849
Pioneer	87,861	949,379
Kalamia	84,161	878,663
Inkerman	79,850	774,549
Burdekin	408,865	4,361,440

Another solid result was achieved this week with just under 410,000 tonnes crushed – again above budget. Cane continues to be transferred out of the Inkerman area to Pioneer and Invicta mills for processing. Average weekly CCS was 15.21 which is still trending above budget. The highest CCS sample was 18.6 from a rake of Q240 third ratoon in the Pioneer Mill area

[Wilmar](#) 30 August

Herbert

Weekly production figures		
Wilmar Sugar Herbert region mills Week 12, ending 4 September 2021		
	This week	Season to date
Cane crushed		
Victoria	72,696	1,148,456
Macknade	20,127	539,591
Total	92,823	1,688,047
Crop forecast	3.97M	

Higher than average seasonal rainfall has persisted in the Herbert district and continues to impact cane supply. Rain overnight on Monday led to restricted harvesting and crushing operations on Tuesday, with only a single milling train operating until cane supply ran out late that night. Crushing operations resumed at Victoria Mill on Friday. Macknade Mill is scheduled to recommence crushing on Monday afternoon (6 September). The wet weather limited total weekly throughput to about 92,800 tonnes of cane. Cleaning intermissions were brought forward to make most of the forced downtime. Average CCS levels remained at 12.96 units for the second week in a row and is still below budget.

[Wilmar](#) 4 September

Weekly production figures		
Wilmar Sugar Herbert region mills Week 11, ending 28 August 2021		
	This week	Season to date
Cane crushed		
Victoria	123,411	1,075,760
Macknade	51,451	519,464
Total	178,862	1,595,224
Crop forecast	3.97M	

Close to 179,000 tonnes of cane were crushed for the week taking the season-to-date throughput to almost 1.6 million tonnes. CCS levels continue to slowly improve, achieving 12.96 units average for the week. The season-to-date CCS remains under budget at 12.56 units. Monthly rainfall exceeded the long-term annual average for the second month in a row. Wet conditions across the district resulted in cane supply shortfalls which allowed scheduled mill maintenance stops to be brought forward during the week.

[Wilmar](#), 30 August

Plane Creek

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 12, Week ending 04 September 2021		
	This week	Season to date
Cane crushed	20,041	645,160
Average bin weight	4.07	3.96
CCS	14.86	13.82

The reduced weekly throughput of just over 20,000 tonnes of cane was due to wet weather, which brought crushing operations to a stop about 10am on Tuesday. Factory maintenance and chemical cleans were undertaken to make the most of the wet weather stop. The season-to-date crushing total is now 645,160 tonnes, or 48% of the district’s estimated crop. Average weekly CCS was 14.86, down from 15.22 the previous week. The average bin weight for the week remained firm. Rainfall of 81mm was recorded at Plane Creek Mill for the week, bringing the total for the season to 141mm. Conditions are forecast to improve this week.

[Wilmar](#) 4 September

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 11, Week ending 28 August 2021		
	This week	Season to date
Cane crushed	57,528	625,120
Average bin weight	4.04	3.95
CCS	15.22	13.78

A total of 57,528 tonnes of cane was crushed for the week, bringing the season total to just over 625,000 tonnes. Total mill throughput was below budget due to a number of stoppages throughout the week. Average CCS increased by 0.27 of a unit over the previous week, pushing the weekly CCS figure above 15 for the first time this season. The weekly CCS closed out at 15.22 units and the season to date CCS is now 13.78 units.

[Wilmar](#) 30 August

Proserpine

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 10, ending 4 September 2021		
	This week	Season to date
Cane crushed	24,391	676,213
Average bin weight	9.66	9.59
CCS	14.37	14.26

About 24,300 tonnes of cane was crushed for the week, which was well below budget due to a wet weather event on Monday evening and Tuesday. The wet weather also caused CCS for the week to drop to 14.37 – about a quarter of a unit below budget. Major factory maintenance was undertaken to take advantage of the wet weather stop.

[Wilmar](#) 4 September

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 9, ending 28 August 2021		
	This week	Season to date
Cane crushed	75,255	651,822
Average bin weight	9.61	9.59
CCS	14.95	14.26

The weekly throughput of 75,000 tonnes was below budget due to the requirement to shut down No. 3 boiler for necessary repairs. The boiler is scheduled to come back online this week. CCS continues its steady climb upwards. Average weekly CCS was 14.95 – more than half a unit above budget.

[Wilmar](#) 30 August



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