

Harvest Update for the Australian Sugar Industry

Fortnight Ending 17 October 2021

Photo supplied by CANEGROWERS



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Editor: LINDSAY JOLLY

The Australian Cane Crush Reaches Three-Quarters Milestone

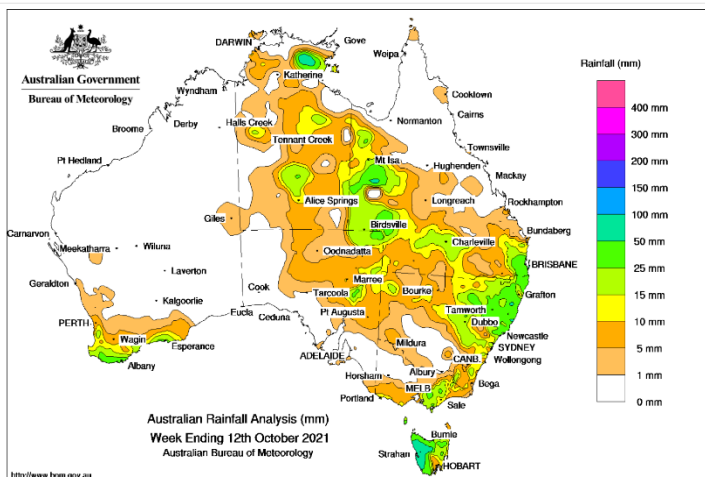
The Australian industry achieved a crush tally of [REDACTED] mln tonnes in both week 19 and week 20 (week ending 17 October). Rainfall disrupted harvesting in the Southern Queensland region and in the New South Wales industry. Even so, despite the rain disruptions to the harvest over past weeks, the cane crush is now three-quarters done (much the same as for last season at this time). Some regions are more advanced [REDACTED]

[REDACTED] The tenth fortnight saw the cumulative Australian crush volume reach [REDACTED] mln tonnes. The comparable figure last season was higher at [REDACTED] mln tonnes. Both seasons have suffered rain interruptions, but this year's harvest has been blighted by more frequent interruptions compounded by mill performance issues in some areas. Queensland's to-date crush had reached [REDACTED] mln tonnes and the NSW industry reached 1.27 mln tonnes, after a particularly poor rain-impacted crush of only [REDACTED] tonnes in week 20. After seven weeks of flat average weekly CCS levels, the to-date CCS level for the Australian industry has finally fallen behind last season, at [REDACTED] units compared to 13.59 units. [REDACTED]

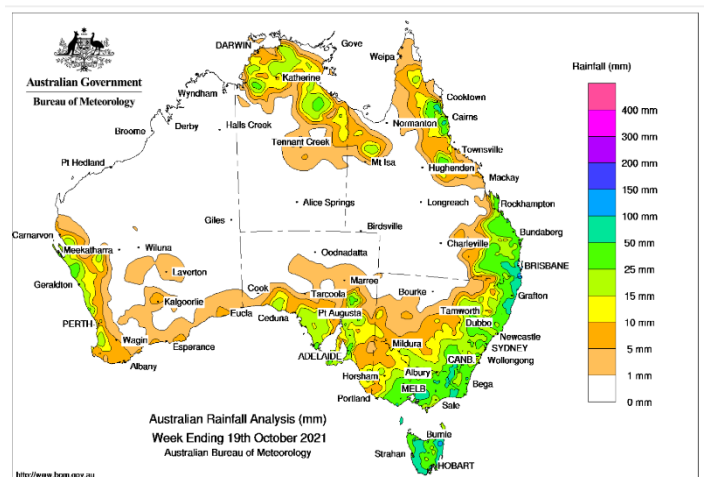
... But weather delays persist and the tail will be long

The ASMC has lowered its estimate for Australia's cane crush further to [REDACTED] mln tonnes as against their initial estimate of [REDACTED] mln tonnes, and last season's tally of [REDACTED] mln tonnes. [REDACTED]. Because of the recent rain disruption, several mills will have to crush longer than normal – possibly well into December, when there is significant risk of summer rainfall events - to achieve crush-out. The early plateauing in CCS level also gives cause to par back expectations for sugar output. [REDACTED]

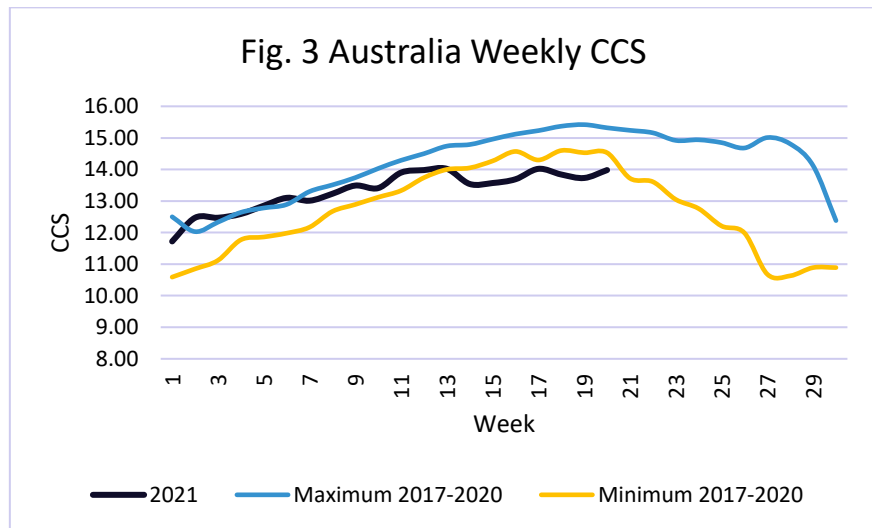
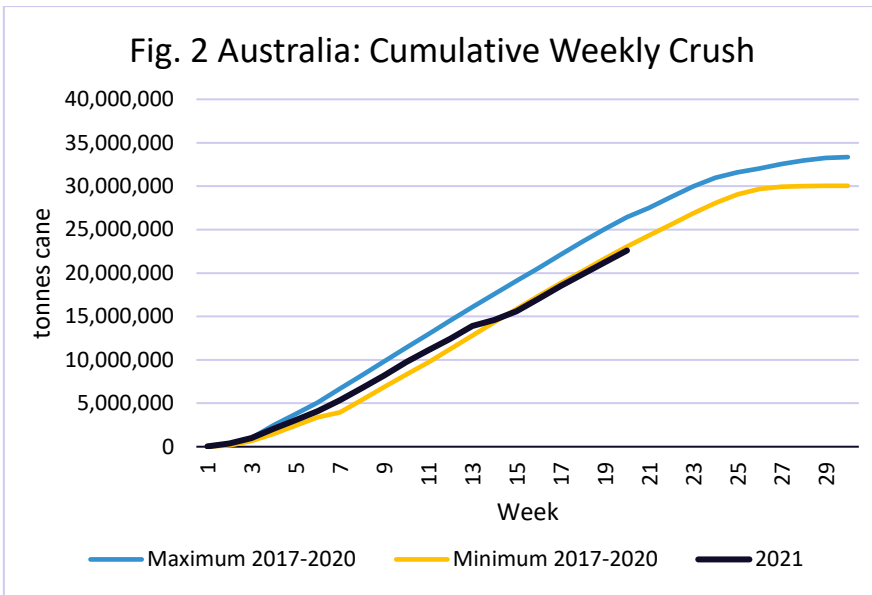
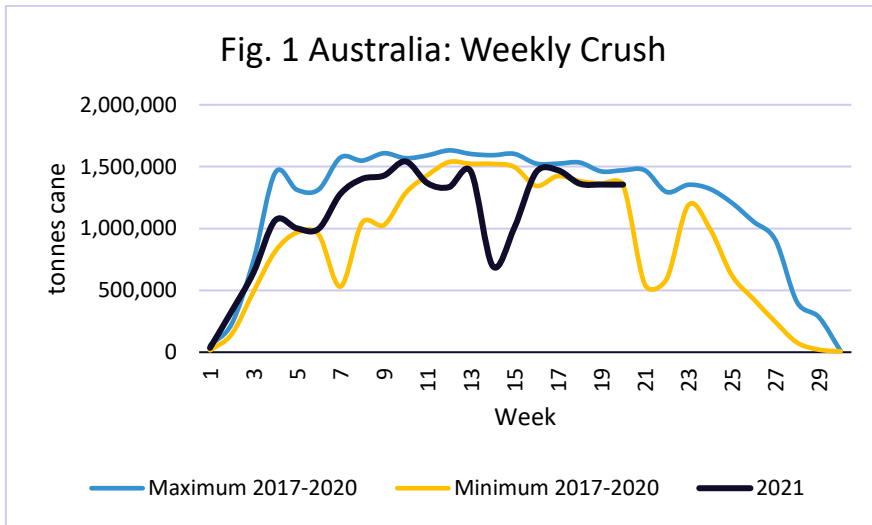
Rainfall totals map for the 7 days ending 9 am 12 October 2021



Rainfall totals map for the 7 days ending 9 am 19 October 2021



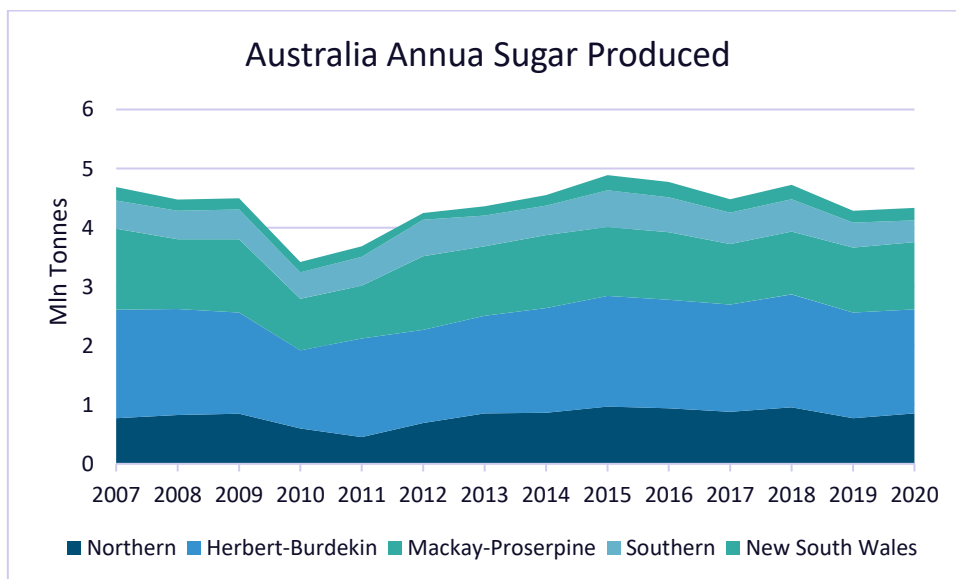
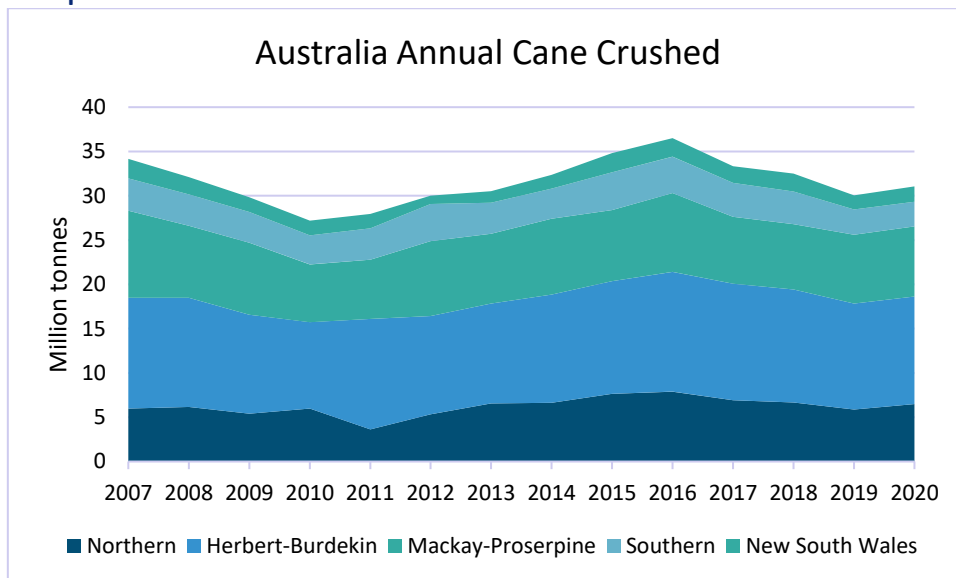
<http://www.bom.gov.au/climate/rainfall/>



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	1,366,259	11,095,057	13.90	13.22
22/08/2021	1,335,033	12,430,109	13.98	13.30
29/08/2021	1,459,869	13,889,978	14.02	13.38
5/09/2021	696,302	14,586,281	13.54	13.38
12/09/2021	1,007,981	15,594,262	13.57	13.40
19/09/2021	1,455,912	17,050,176	13.69	13.42
26/09/2021	████████	████████	████	████
3/10/2021	████████	████████	████	████
10/10/2021	████████	████████	████	████
17/10/2021	████████	████████	████	████

Cont'd

Table 1: Australia Weekly Crush (tonnes) continued

Week Ending	Weekly Crush	To-Date Crush	Weekly CCS	To-Date CCS
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
25/09/2020	1,495,035	19,079,558	14.30	13.36
2/10/2020	1,483,535	20,563,094	14.60	13.45
9/10/2020	1,461,411	22,024,504	14.53	13.52
16/10/2020	1,416,990	23,441,420	14.71	13.59

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	225,797	560,292	358,793	118,092	1,262,974	72,059	1,335,033
29/08/2021	310,334	583,727	358,811	120,635	1,373,507	86,362	1,459,869
5/09/2021	182,857	187,173	143,335	103,716	617,081	79,221	696,302
12/09/2021	272,135	247,171	283,004	119,588	921,898	86,083	1,007,981
19/09/2021	317,817	583,530	344,625	122,019	1,367,991	87,921	1,455,912
26/09/2021							
3/10/2021							
10/10/2021							
17/10/2021							

Source: ASMC, WKS Estimates.

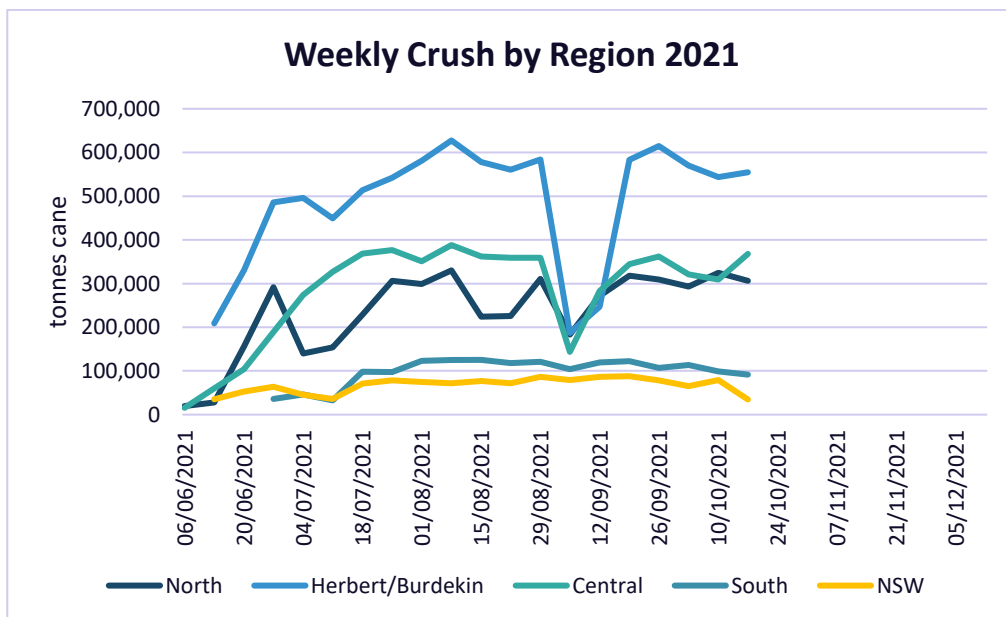


Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

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	2,402,997	5,372,937	3,174,557	801,339	11,751,830	678,279	12,430,109
29/08/2021	2,713,331	5,956,664	3,533,369	921,974	13,125,338	764,640	13,889,978
5/09/2021	2,896,189	6,143,837	3,676,704	1,025,690	13,742,420	843,861	14,586,281
12/09/2021	3,168,324	6,391,008	3,959,708	1,145,278	14,664,318	929,944	15,594,262
19/09/2021	3,486,141	6,974,538	4,304,334	1,267,297	16,032,310	1,017,866	17,050,176
26/09/2021							
3/10/2021							
10/10/2021							
17/10/2021							

Source: ASMC, WKS Estimates.

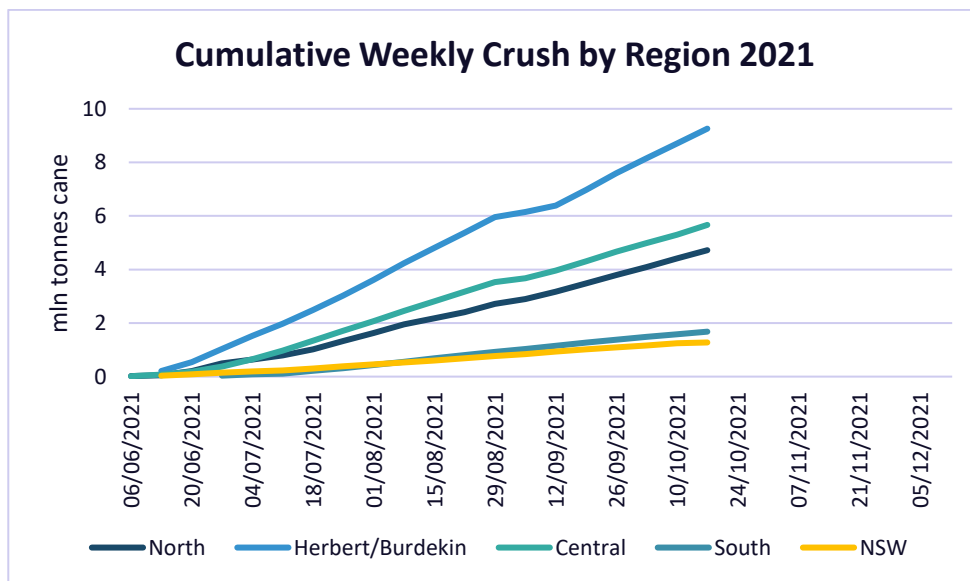


Table 4: Australian CCS Content by Region (%)

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	12.61	14.35	14.54	14.03	14.06	12.52	13.98
29/08/2021	12.40	14.53	14.83	14.16	14.10	12.78	14.02
5/09/2021	12.49	13.97	14.33	14.12	13.64	12.76	13.54
12/09/2021	12.38	13.22	14.73	14.58	13.62	13.12	13.57
19/09/2021	12.12	13.74	14.73	14.90	13.72	13.34	13.69
26/09/2021							
3/10/2021							
10/10/2021							
17/10/2021							

Source: ASMC, WKS Estimates.

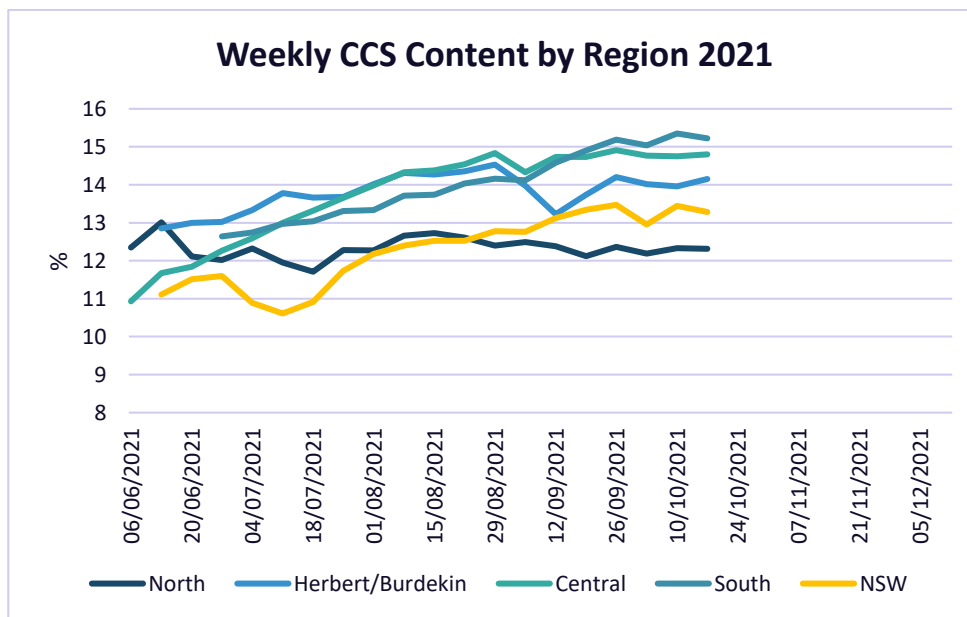
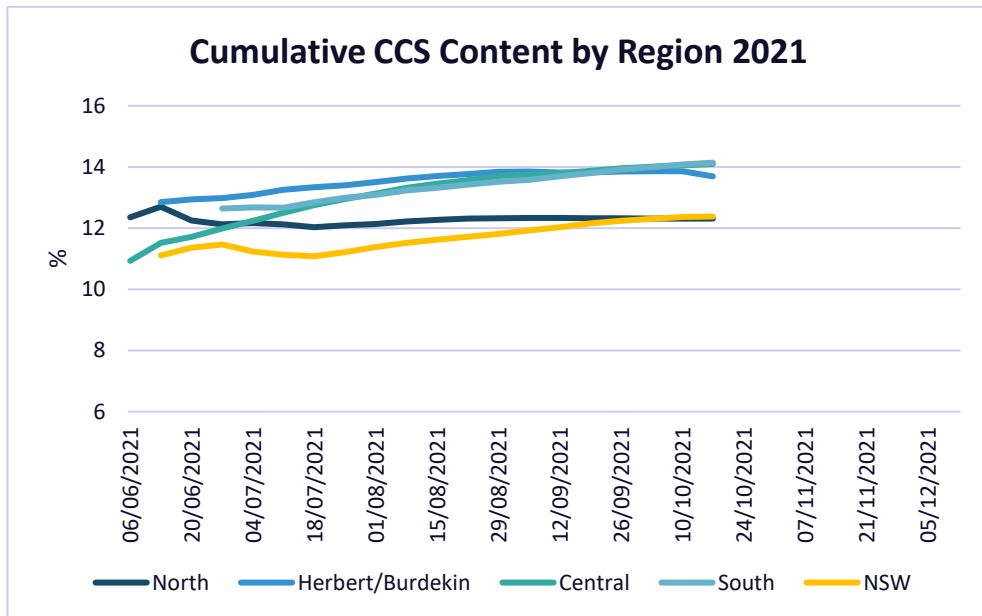


Table 5: Australian Cumulative CCS Content by Region (%)

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	12.31	13.77	13.57	13.42	13.39	11.72	13.30
29/08/2021	12.32	13.84	13.70	13.52	13.47	11.81	13.38
5/09/2021	12.33	13.85	13.73	13.58	13.47	11.92	13.38
12/09/2021	12.33	13.82	13.80	13.69	13.48	12.03	13.40
19/09/2021	12.32	13.82	13.87	13.80	13.50	12.15	13.42
26/09/2021							
3/10/2021							
10/10/2021							
17/10/2021							

Source: ASMC, WKS Estimates.





PRESS REPORT

Growers set to drive sugar industry forward

The peak sugarcane growers’ group CANEGROWERS welcomed today’s announcement of funding as the Australian sugar industry works to develop a strategy and roadmap to secure its future. It is almost a year ago industry leaders came together – growers, millers and researchers – to agreed on the need to work together on a strategy to take the industry to 2040 and beyond. With the confirmation of support from the Cooperative Research Centre for Northern Australia (CRCNA), this goal can move forward as growers work with organisations across the Australian supply chain to give this vision some clarity and action with a shared Sugarcane Industry Roadmap. While producing raw sugar for export may always be a key part of the industry, the time is right to take stock, work collaboratively and map the priorities that will take the sector forward.

[CANEGROWERS](#) 12 October

Wilmar Production Reports

Burdekin

Weekly production figures		
Burdekin region mills Week 19, ending 16 th October 2021		
Cane crushed	This week	Season to date
Invicta	147,281	2,546,685
Pioneer	79,914	1,352,454
Kalamia	72,451	1,303,877
Inkerman	85,640	1,230,385
Burdekin	385,286	6,433,401

Throughput this week was just under 385,000 tonnes. This was well above budget, despite unplanned stops at Kalamia and Invicta mills through the week. Inkerman Mill’s weekly throughput of 85,640 tonnes was the second highest throughput for the season to date. The Burdekin mills have now processed more than 6.4 mln tonnes, which represents more than 80% of the total estimated crop. With current mill performance and no wet weather, crushing should wrap up in the second and third weeks of November. The average weekly CCS was 14.71 which was up on the previous week, but still below budget.

[Wilmar](#) 18 October

Weekly production figures		
Burdekin region mills Week 18, ending 9 th October 2021		
Cane crushed	This week	Season to date
Invicta	142,065	2,399,404
Pioneer	66,504	1,272,485
Kalamia	75,985	1,231,426
Inkerman	79,787	1,144,745
Burdekin	364,341	6,048,060

Throughput this week was just under 365,000 tonnes. This was above budget, despite significant stops at Inkerman, Invicta and Pioneer mills through the week. The Burdekin mills have now processed more than 6M tonnes for the season to date, which represents more than 75 % of the total estimated crop. With current mill performance and no wet weather, crushing should wrap up in the second and third weeks of November. The average weekly CCS was 14.45 which continues to trend below budget.

[Wilmar](#) 11 October

Herbert

Weekly production figures		
Wilmar Sugar Herbert region mills Week 18, ending 16 October 2021		
	This week	Season to date
Cane crushed		
Victoria	106,592	1,898,534
Macknade	62,448	926,166
Total	169,040	2,824,700
Crop forecast	3.89M	

Just over 169,000 tonnes of cane were crushed for the week. Average weekly CCS remains below budget at 12.87 units, with the season to date average sitting at 12.69 units. A thunderstorm on Friday afternoon hindered some harvesting operations across the district, and crushing capacity was reduced at Victoria whilst repairs were undertaken.

[Wilmar](#), 18 October

Weekly production figures		
Wilmar Sugar Herbert region mills Week 17, ending 9 October 2021		
	This week	Season to date
Cane crushed		
Victoria	111,030	1,791,942
Macknade	68,463	863,718
Total	179,493	2,655,660
Crop forecast	3.89M	

The Herbert mills crushed just under 180,000 tonnes for the week. Average weekly CCS continues to trend below budget at 12.97 units. Victoria mill suffered reduced crushing capacity for two days whilst repairs were undertaken.

[Wilmar](#), 11 October

Plane Creek

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 18, Week ending 16 October 2021		
	This week	Season to date
Cane crushed	63,307	985,388
Average bin weight	4.00	3.97
CCS	15.26	14.31

A reasonable weekly throughput of just over 63,000 tonnes brought the season total to more than 985,000 tonnes. CCS edged higher by 0.04 of a unit over the previous week and the season-to-date CCS closed out at 14.31.

[Wilmar](#), 18 October

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 17, Week ending 09 October 2021		
	This week	Season to date
Cane crushed	61,621	922,081
Average bin weight	4.03	3.97
CCS	15.22	14.25

Plane Creek Mill crushed about 61,600 tonnes of cane for the week, bringing the season total to just over 922,000 tonnes. This was a good weekly throughput, given there was a 16-hour unplanned stoppage. Weekly CCS was steady at 15.22 units. The season to date CCS closed out at 14.25.

[Wilmar](#) 11 October

Proserpine

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 16, ending 16 October 2021		
	This week	Season to date
Cane crushed	87,323	1,167,981
Average bin weight	9.54	9.58
CCS	14.92	14.46

Proserpine Mill processed more than 87,300 tonnes of cane for the week, which was above budget. The factory has now processed a total of 1.17mln tonnes which is close to 75% of the total estimated crop. Harvesting conditions continue to be favourable and the crop continues to cut at about 97.6% to estimate. CCS increased for the fourth week in a row to average 14.92 units.

[Wilmar](#), 18 October

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 15, ending 9 October 2021		
	This week	Season to date
Cane crushed	70,460	1,080,658
Average bin weight	9.58	9.58
CCS	14.79	14.42

Proserpine Mill processed close to 70,500 tonnes of cane for the week. The scheduled maintenance day on Wednesday was completed successfully. Harvesting conditions continue to be favourable and the crop is cutting at about 97.5% to estimate. CCS for the week increased to 14.79, however is still tracking below budget.

[Wilmar](#) 11 October



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