

Harvest Update for the Australian Sugar Industry

Fortnight Ending 14 November 2021

Photo supplied by CANEGROWERS



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Editor: LINDSAY JOLLY

Less than 10% of the Australian Cane Crop Remains to be Crushed

The Australian industry achieved a crush tally of 1.38 mln tonnes in week 23, but this slumped to only [redacted] mln tonnes in week 24 (week ending 14 November), with some rain interruptions and several mills already achieving crush-out. The cane crush is now more than 90% complete. Some regions are more advanced. Three of the Burdekin mills have crushed out: Kalamia finished first on [redacted] November with a season total of 1.55 mln tonnes; Invicta finished next on [redacted] November with a season throughput of [redacted] mln tonnes; and Pioneer finished on [redacted] November with a total throughput of [redacted] mln tonnes. Inkerman is expected to finish by [redacted] November. Progress is slower in the Herbert but with [redacted] crushed, the season is expected to finish on [redacted] November. In the North, almost [redacted] of the available crop has been crushed with Mossman and Mulgrave already achieving crush-out on 3 November and 11 November respectively. The Tableland mill should be next on [redacted] November; South Johnstone on [redacted] November and Tully as late as [redacted] December. In the Central Zone, only 84% of the estimated crop has been crushed., with the Mackay mills at [redacted] and expecting a crush-out date of [redacted] December. Proserpine and Plane Creek are more advanced at 95% and 90% respectively with crush out dates of [redacted] November and 1 December. In the South, the Isis mill has only reached 81% (there have been issues with the transshipment of cane from the Maryborough mill area), the small Rocky Point Mill has reached 63%, but Bundaberg is advanced with 93% of their estimated crop crushed and with a likely finish date of [redacted] November.

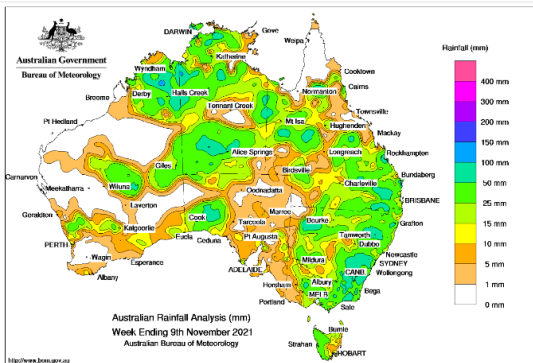
Tally lags last year by [redacted] mln tonnes

The twelfth fortnight saw the cumulative Australian crush volume reach 27.74 mln tonnes. The comparable figure last season was more than [redacted] mln tonnes 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, compounded by lower tonnages in some mill areas than originally expected. Queensland’s to-date crush had reached [redacted] mln tonnes and the NSW industry reached [redacted] mln tonnes. The first of Sunshine Sugar’s three mills crushed-out on [redacted] November. The to-date CCS level for the Australian industry has fallen further behind last season, at 13.57 units compared to 13.76 units. This development amply illustrates the impact of persistent wet weather events on this season’s weekly sugar content in cane, which has been the lowest of the past 5 years since early September.

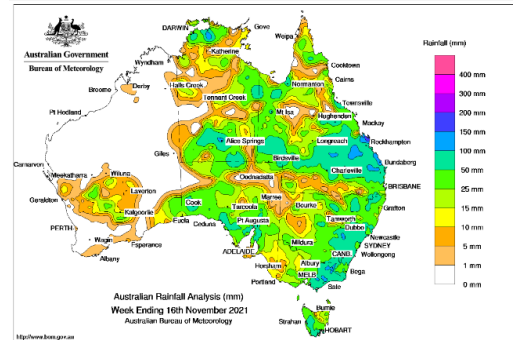
Australia’s cane crush is now estimated at [redacted] mln tonnes as against an initial estimate of [redacted] mln tonnes, and last season’s tally of 31.07 mln tonnes. Crops in the Wet tropics region have been cutting out well below estimate in some areas. The ASMC estimates that there has been a reduction of [redacted] tonnes in the crop forecast for the areas from the Herbert north since the beginning of the season. WKS anticipates that sugar production from the 2021 crush will likely reach no more than [redacted] mln tonnes (4.335 mln tonnes last season),

[redacted] The early plateauing in CCS level also gives cause to cut back expectations for sugar output.

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



Rainfall totals map for the 7 days ending 9 am 16 November 2021



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

Fig. 1 Australia: Weekly Crush

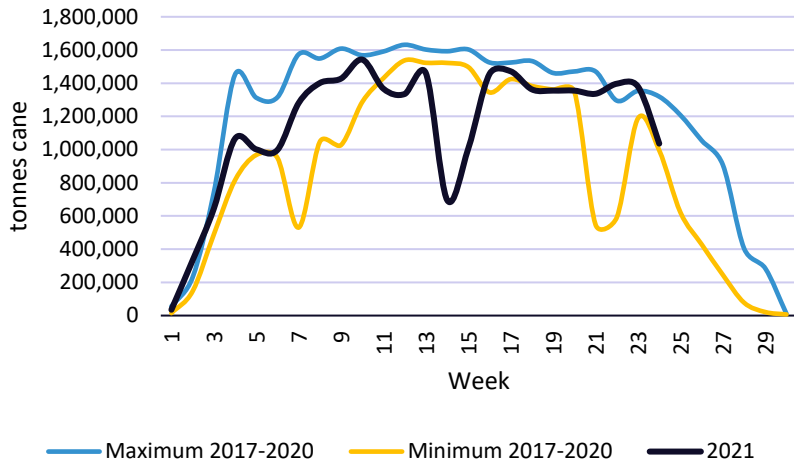


Fig. 2 Australia: Cumulative Weekly Crush

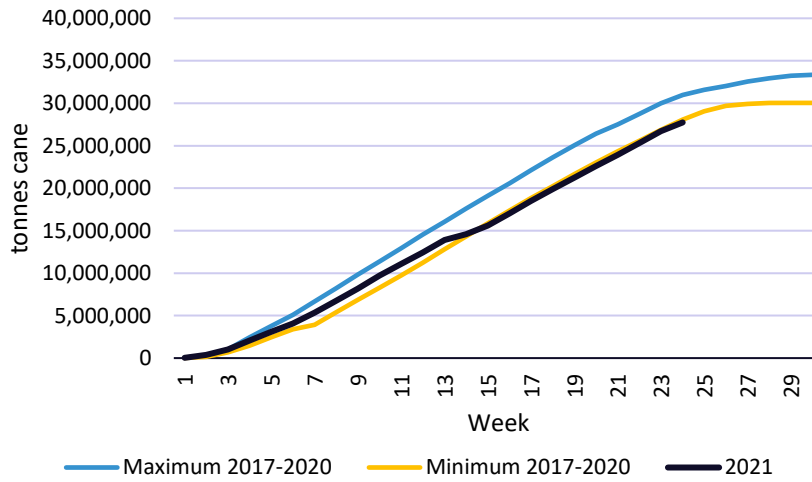
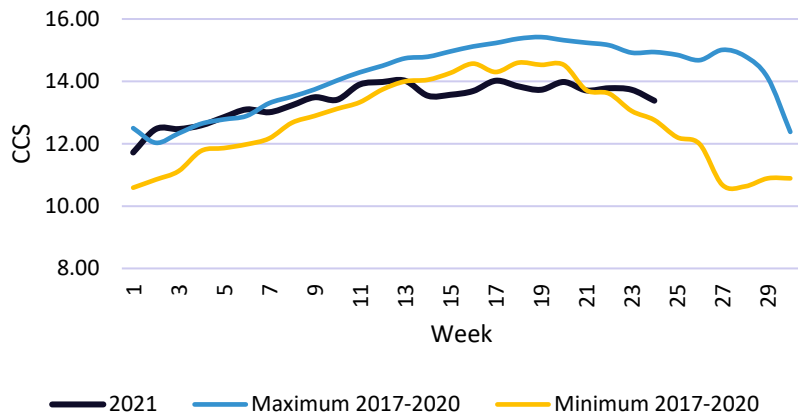


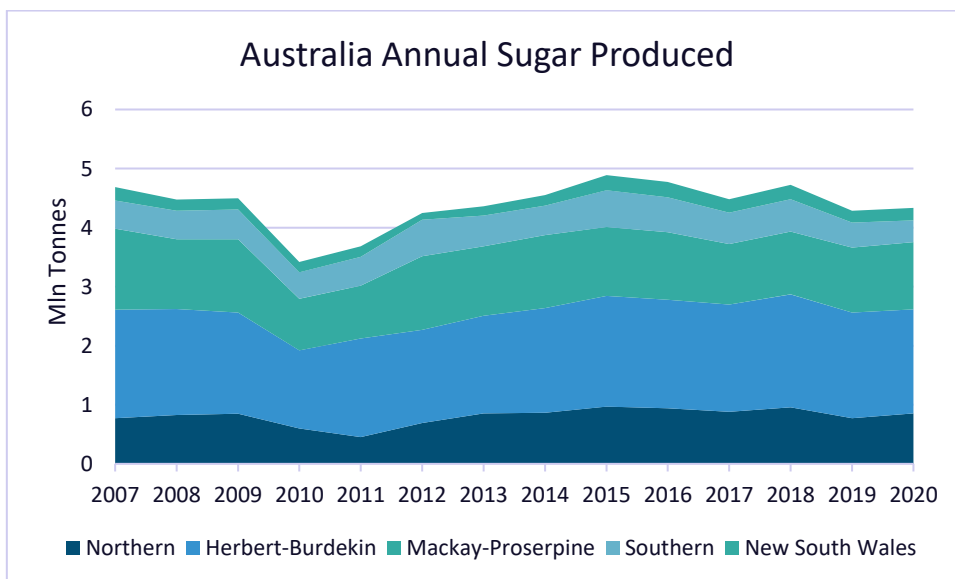
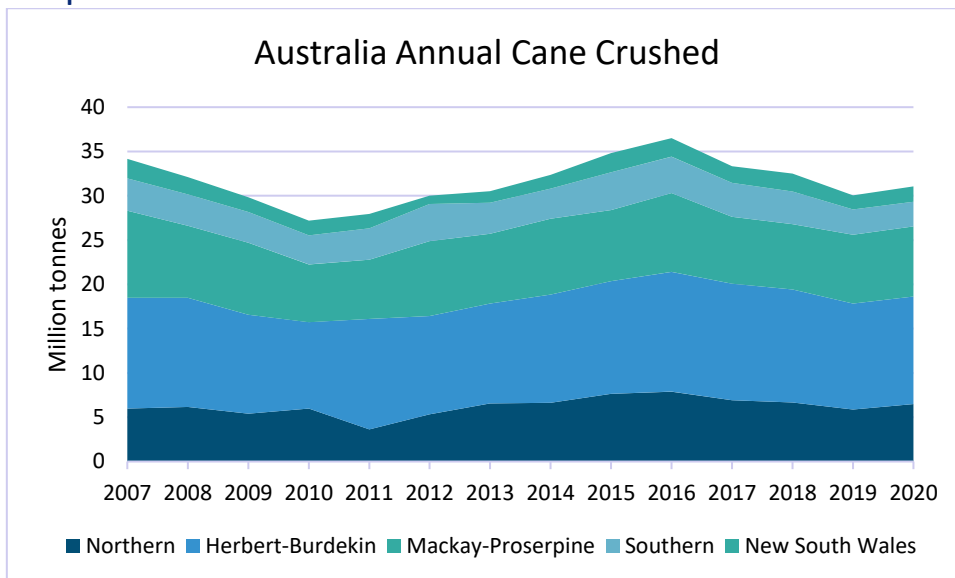
Fig. 3 Australia Weekly CCS



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	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	1,471,381	18,521,563	14.02	13.47
3/10/2021	1,362,480	19,884,045	13.84	13.50
10/10/2021	1,355,358	21,239,405	13.73	13.51
17/10/2021	████████	████████	████	████
24/10/2021	████████	████████	████	████
30/10/2021	████████	████████	████	████
7/11/2021	████████	████████	████	████
14/11/2021	████████	████████	████	████

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
23/10/2020	1,470,617	24,911,988	14.76	13.66
29/10/2020	1,295,028	26,207,016	14.35	13.70
6/11/2020	1,353,511	27,560,527	14.55	13.74
13/11/2020	1,197,381	28,757,908	14.23	13.76

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	309,229	615,090	362,072	106,627	1,393,018	78,363	1,471,381
3/10/2021	292,978	570,258	320,609	113,773	1,297,618	64,862	1,362,480
10/10/2021	324,367	543,889	309,523	98,631	1,276,410	78,948	1,355,358
17/10/2021							
24/10/2021							
30/10/2021							
7/11/2021							
14/11/2021							

Source: ASMC, WKS Estimates.

Weekly Crush by Region 2021

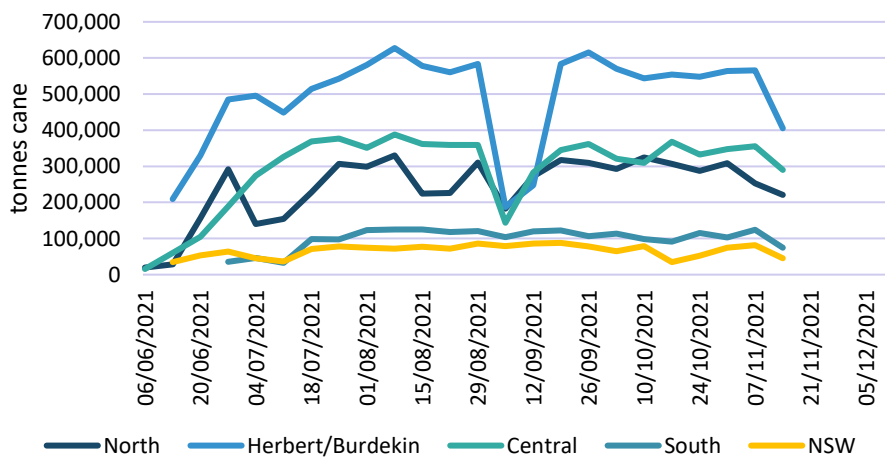


Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

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	3,795,378	7,589,628	4,666,405	1,373,924	17,425,335	1,096,228	18,521,563
3/10/2021	4,088,358	8,159,886	4,987,014	1,487,697	18,722,955	1,161,090	19,884,045
10/10/2021	4,412,726	8,703,775	5,296,537	1,586,329	19,999,367	1,240,038	21,239,405
17/10/2021							
24/10/2021							
30/10/2021							
7/11/2021							
14/11/2021							

Source: ASMC, WKS Estimates.

Cumulative Weekly Crush by Region 2021

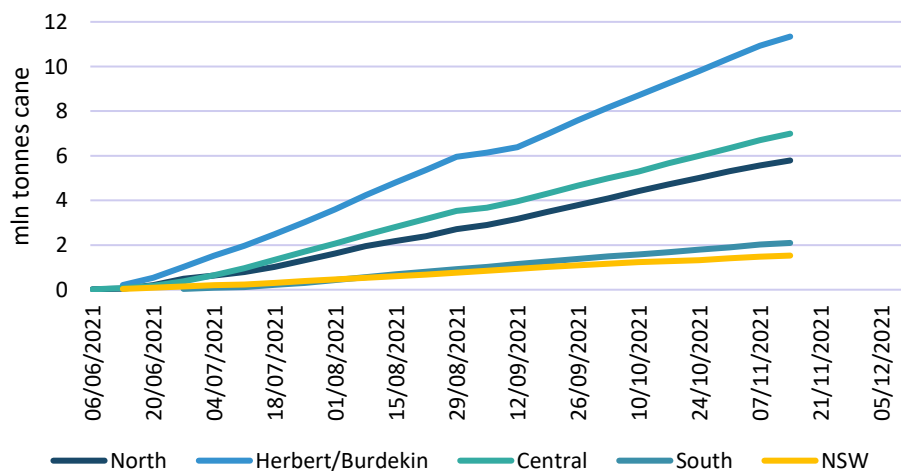


Table 4: Australian CCS Content by Region (%)

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	12.36	14.20	14.91	15.19	14.05	13.47	14.02
3/10/2021	12.19	14.02	14.77	15.04	13.88	12.95	13.84
10/10/2021	12.33	13.96	14.75	15.35	13.84	13.44	13.73
17/10/2021							
24/10/2021							
30/10/2021							
7/11/2021							
14/11/2021							

Source: ASMC, WKS Estimates.

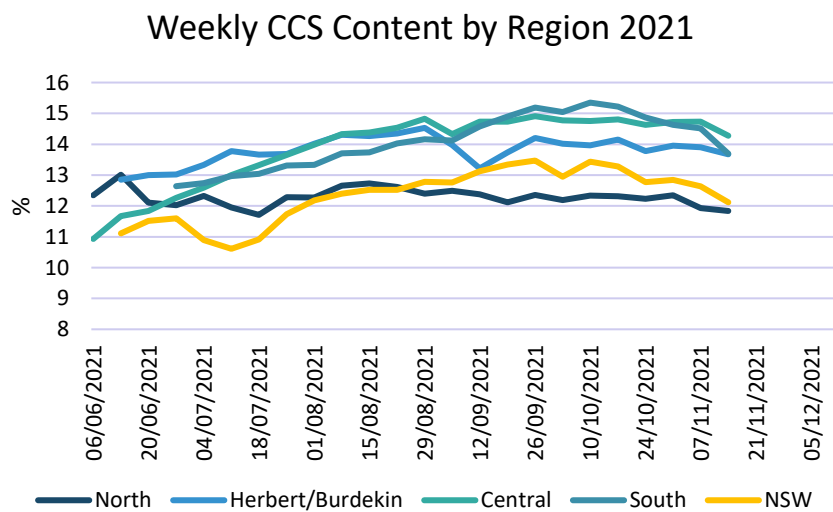
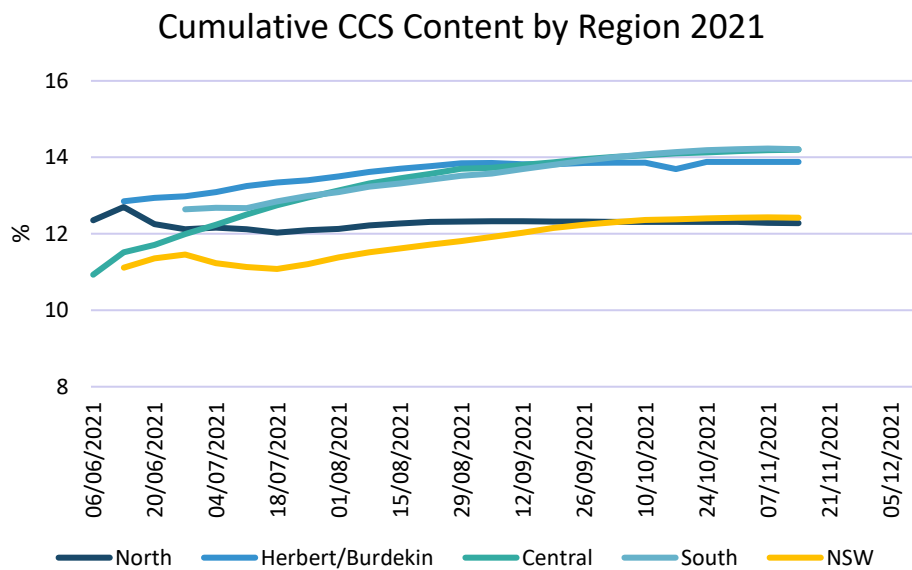


Table 5: Australian Cumulative CCS Content by Region (%)

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	12.32	13.85	13.95	13.91	13.55	12.24	13.47
3/10/2021	12.31	13.86	14.01	14.00	13.57	12.30	13.50
10/10/2021	12.31	13.86	14.05	14.08	13.58	12.36	13.51
17/10/2021							
24/10/2021							
30/10/2021							
7/11/2021							
14/11/2021							

Source: ASMC, WKS Estimates.





PRESS REPORT

Harness Queensland sugar mills’ carbon abatement potential

The Queensland sugar industry has the potential to significantly assist Australia’s transition to net-zero emissions, the Australian Sugar Milling Council has said. ASMC Chief Executive Officer, Rachele Sheard, said “Queensland sugar mills already have 438 MWs of bagasse fired cogeneration capacity, generating 900,000 megawatt hours (MWhs) of renewable electricity per annum. Reducing 700,000 tonnes of carbon dioxide is the equivalent (CO₂-e) of removing emissions of about 150,000 standard vehicles from our atmosphere. Further, if Queensland 4% ethanol target were to be met, the sector would achieve even greater CO₂ abatement through E10 fuel sales. Furthermore, expert analysis has found Queensland sugar mills could substantially increase their cogeneration under the right conditions. Growing the cogeneration could lead to potential new investment that will stimulate regional Queensland economies. The added benefit of co-gen supply is that it is synchronous, meaning it will shore up reliability and security of the grid and assist with addressing the intermittent supply associated with wind and solar power supply,” said Rachele Sheard.

[ASMC](#) 9 November

Wilmar Production Reports

Burdekin

Weekly production figures		
Burdekin region mills		
Week 23, ending 13th November 2021		
Cane crushed	This week	Season to date
Invicta	72,027	3,050,914
Pioneer	60,314	1,625,328
Kalamia	30,736	1,552,308
Inkerman	73,419	1,535,683
Burdekin	236,496	7,764,233

Throughput this week was just under 240,000 tonnes, with the three north bank mills crushing out. Kalamia finished first on 9 November with a season total of 1.55 mln tonnes. Invicta finished next on 10 November with a season throughput of 3.05 mln tonnes, and Pioneer finished on 12 November with a total throughput of 1.62 mln tonnes. Inkerman is expected to finish by 24 November. A band of storms swept through the region on Friday evening dumping 20-50mm of rain, which impacted harvesting over the weekend. The average weekly CCS continues to trend below budget at 14.39.

[Wilmar](#) 15 November

Weekly production figures**Burdekin region mills
Week 22, ending 06th November 2021**

Cane crushed	This week	Season to date
Invicta	152,162	2,978,887
Pioneer	73,497	1,565,014
Kalamia	71,568	1,521,572
Inkerman	75,347	1,462,264
Burdekin	372,574	7,527,737

Throughput this week was just over 372,000 tonnes, which exceeded budget. The Burdekin mills have now processed about 7.5 mln tonnes, which represents more than 95% of the total estimated crop. Based on current crop estimates, forecast factory throughputs and no further rain disruptions, harvesting should be completed between 9 and 12 November on the north bank and by 21 November on the south bank. The average weekly CCS continues to trend below budget at 14.41. The CCS dropped to this level following a mid-season rain event and has remained steady.

[Wilmar](#) 15 November

Herbert**Weekly production figures****Wilmar Sugar
Herbert region mills
Week 22, ending 13 November 2021**

	This week	Season to date
Cane crushed		
Victoria	108,271	2,399,482
Macknade	60,560	1,176,426
Total	168,831	3,575,908
Crop forecast	3.89M	

Just under 169,000 tonnes of cane were crushed for the week. Victoria Mill's A-side had a 12-hour planned cleaning and maintenance stop on Wednesday. There was a slight decrease in CCS levels with the season-to-date CCS figure remaining at 12.74 units. Based on revised crop trends, forecast throughputs and no rain disruptions, the last day of harvesting for the Herbert mill is expected to be Tuesday 23 November.

[Wilmar](#), 15 November

Weekly production figures		
Wilmar Sugar Herbert region mills Week 21, ending 6 November 2021		
	This week	Season to date
Cane crushed		
Victoria	132,693	2,291,211
Macknade	60,035	1,115,866
Total	192,728	3,407,077
Crop forecast	3.89M	

Just under 193,000 tonnes of cane were crushed for the week. There was a slight decrease in CCS levels following last week’s high of 13 units. The season-to-date CCS is now sitting at 12.74 units. Based on revised crop trends and no major factory disruptions, the last day of harvesting for the Herbert mills is expected to be Wednesday 24 November.

[Wilmar](#), 15 November

Plane Creek

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 22, Week ending 13 November 2021		
	This week	Season to date
Cane crushed	50,432	1,223,607
Average bin weight	3.79	3.95
CCS	14.33	14.43

Just over 50,000 tonnes of cane were crushed at Plane Creek in a week that was impacted by wet weather. Heavy rain over much of the supply district on Wednesday significantly impacted cane supply. The production team used the forced downtime to carry out factory cleans and maintenance on Thursday. Further heavy rains on Friday afternoon and into the evening resulted in an 18-hour cane supply stoppage on Saturday and into Sunday. The mill resumed crushing at 4am Sunday. The wet weather adversely impacted CCS, resulting in a drop of 0.63 of a unit from the previous week, closing out at 14.33 units.

[Wilmar](#), 15 November

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 21, Week ending 06 November 2021		
	This week	Season to date
Cane crushed	60,299	1,173,175
Average bin weight	3.85	3.95
CCS	14.96	14.44

Just over 60,000 tonnes of cane was processed for the week, bringing the season total to more than 1.17 mln tonnes. Isolated areas of rain impacted cane supply earlier in the week. A full bin derailment disrupted operations for approximately eight hours on Friday. Average weekly CCS was 14.96, down slightly from 15.26 the previous week.

[Wilmar](#) 15 November

Proserpine

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 20, ending 13 November 2021		
	This week	Season to date
Cane crushed	83,683	1,502,667
Average bin weight	9.04	9.49
CCS	14.20	14.46

Proserpine Mill processed close to 84,000 tonnes of cane for the week. The factory has reached the 1.5 mln tonnes crushed milestone, which represents 95% of the total estimated crop. The last day of harvesting for the 2021 season is still expected to be Thursday 18 November 2021.

[Wilmar](#), 15 November

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 19, ending 6 November 2021		
	This week	Season to date
Cane crushed	79,840	1,418,983
Average bin weight	9.16	9.52
CCS	14.49	14.48

Proserpine Mill processed close to 80,000 tonnes of cane for the week. The factory has now crushed a total of 1.42 mln tonnes – almost 90% of the total estimated crop. The scheduled maintenance day on 3 November was successful and there are no further scheduled maintenance days for the remainder of the season. The last day of harvesting for the 2021 season is still expected to be Thursday 18 November 2021.

[Wilmar](#) 15 November



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