

Harvest Update for the Australian Sugar Industry

Fortnight Ending 31 October 2021

Photo supplied by CANEGROWERS



VOL 4 NO. 11
[4 NOVEMBER 2021]

Editor: LINDSAY JOLLY

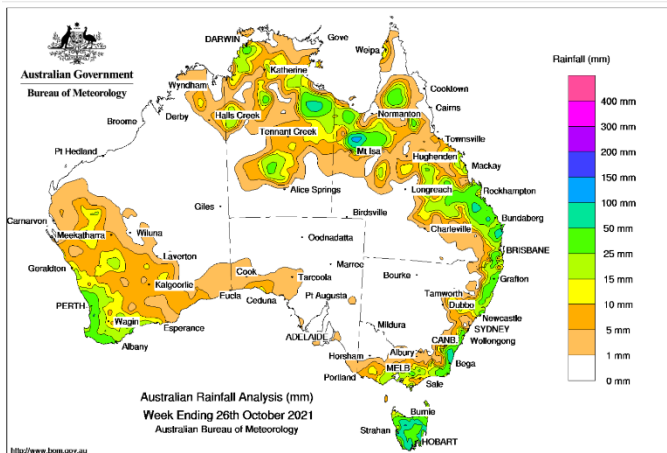
The Australian Cane Crush 80% Complete

The Australian industry achieved a crush tally of [redacted] mln tonnes in week 21 and [redacted] mln tonnes in week 22 (week ending 31 October). The cane crush is now more than 80% complete. Some regions are more advanced. The Burdekin mills for instance now have crush-out firmly in their sights: [redacted]. Progress is slower in the Herbert with [redacted] crushed, in the Mackay region with only [redacted]. In the South the Isis mill has also only reached [redacted] and the small Rocky Point Mill [redacted]. In the North, Mossman, Mulgrave and Tableland mills are well advanced at [redacted] respectively, but South Johnstone and Tully lag at [redacted] and [redacted] respectively. The eleventh fortnight saw the cumulative Australian crush volume reach [redacted] mln tonnes. The comparable figure last season was [redacted] 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 [redacted] mln tonnes, after rain impacted the crush again in week 20 and week 21. The to-date CCS level for the Australian industry has fallen further behind last season, at [redacted] units compared to [redacted] 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.

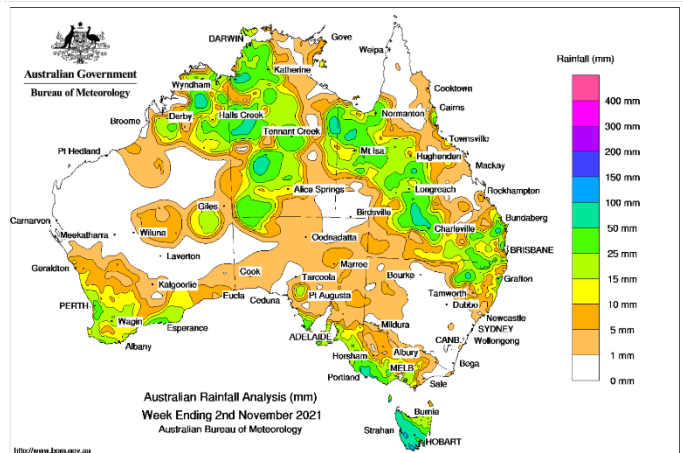
Sugar Tally Will be Smaller

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 [redacted] 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 ([redacted] mln tonnes last season), with downside risks related to the possibility of additional rainfall events further delaying the harvest. Rain disruptions mean several mills will have to crush longer than normal – [redacted] - to achieve crush-out. The early plateauing in CCS level also gives cause to par back expectations for sugar output.

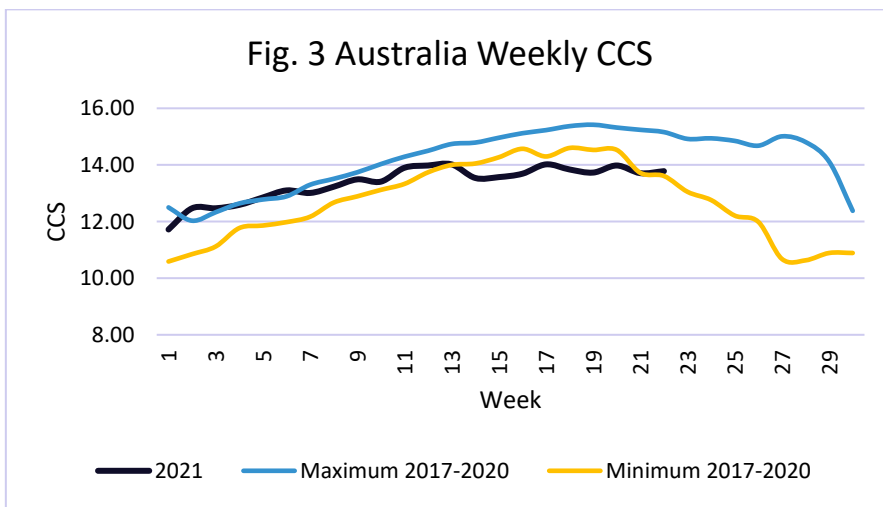
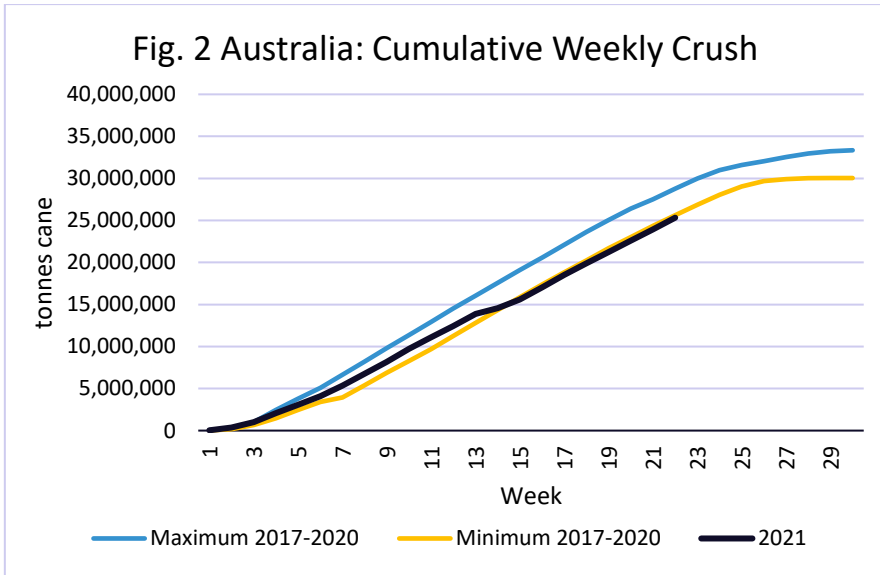
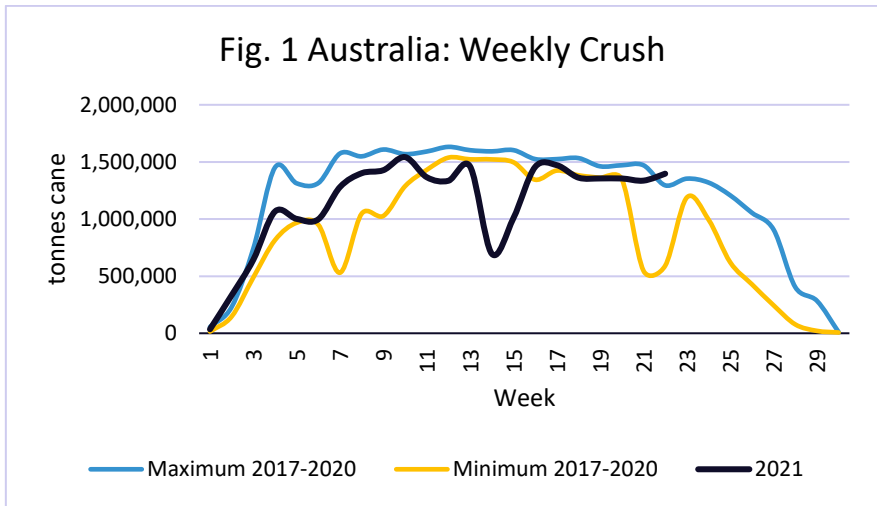
Rainfall totals map for the 7 days ending 9 am 26 October 2021



Rainfall totals map for the 7 days ending 9 am 2 November 2021



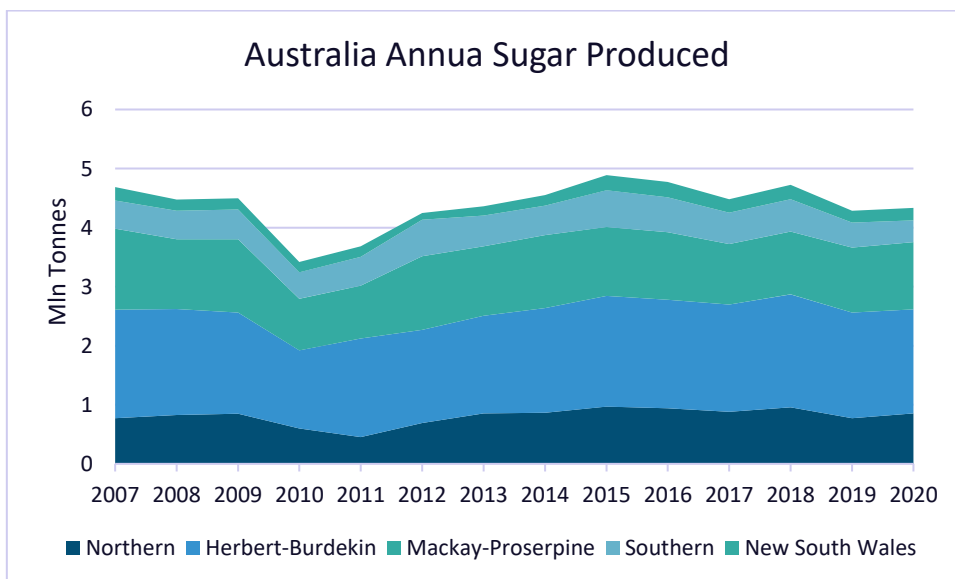
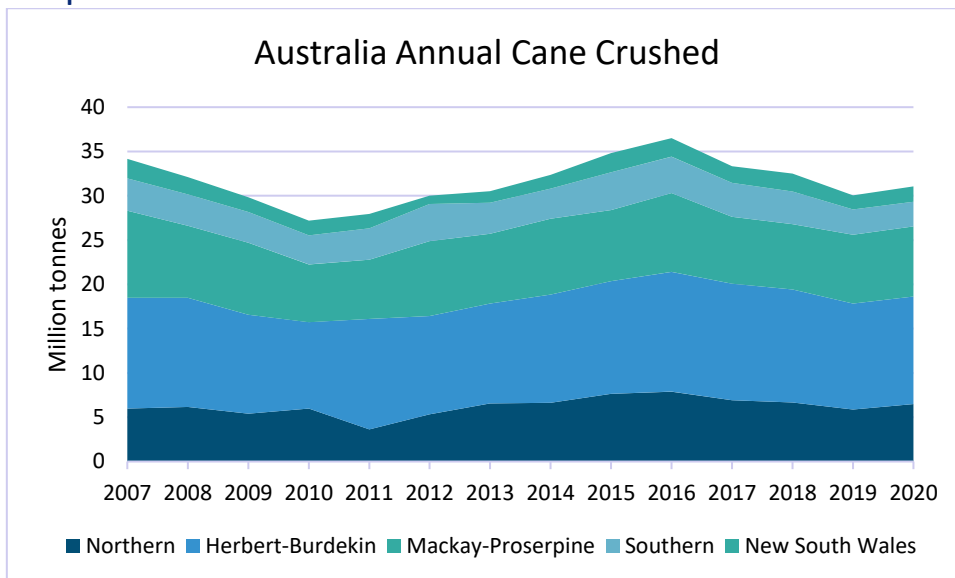
<http://www.bom.gov.au/climate/rainfall/>



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	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	████████	████████	████	████
17/10/2021	████████	████████	████	████
24/10/2021	████████	████████	████	████
30/10/2021	████████	████████	████	████

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
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

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	643,889	309,523	98,631	1,276,410	78,948	1,355,358
17/10/2021	306,431	654,326	368,031	91,736	1,320,524	84,684	1,355,208
24/10/2021	287,692	647,593	332,925	115,432	1,283,642	82,637	1,336,279
30/10/2021	308,796	663,818	347,188	102,764	1,322,566	74,342	1,396,908

Source: ASMC, WKS Estimates.

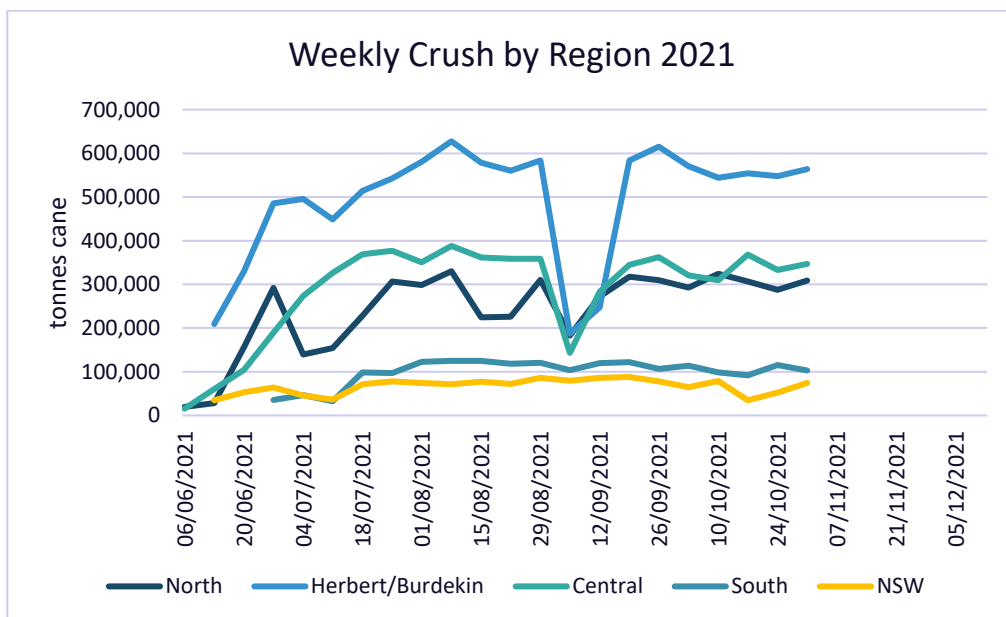


Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

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	3,795,378	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							
17/10/2021							
24/10/2021							
30/10/2021							

Source: ASMC, WKS Estimates.

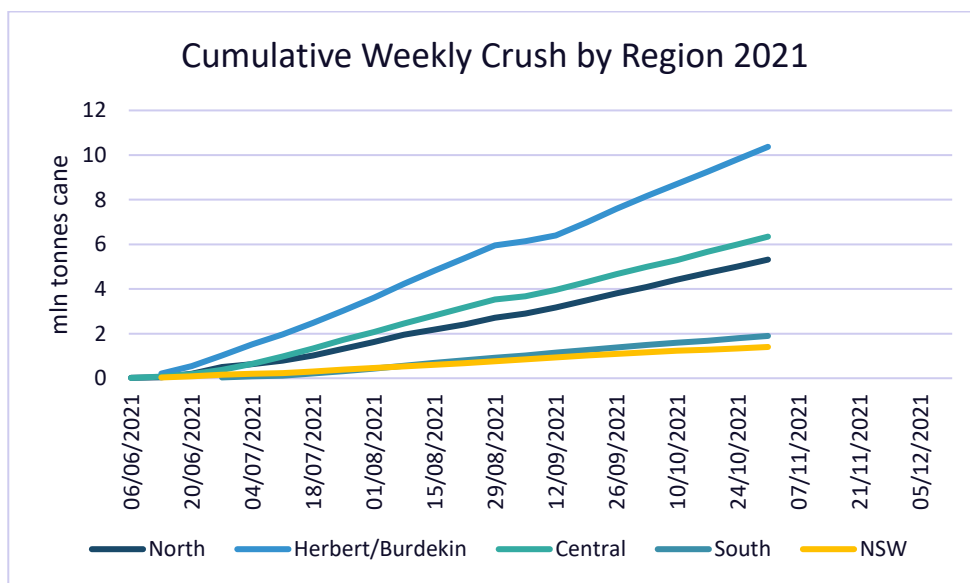


Table 4: Australian CCS Content by Region (%)

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	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							
17/10/2021							
24/10/2021							
30/10/2021							

Source: ASMC, WKS Estimates.

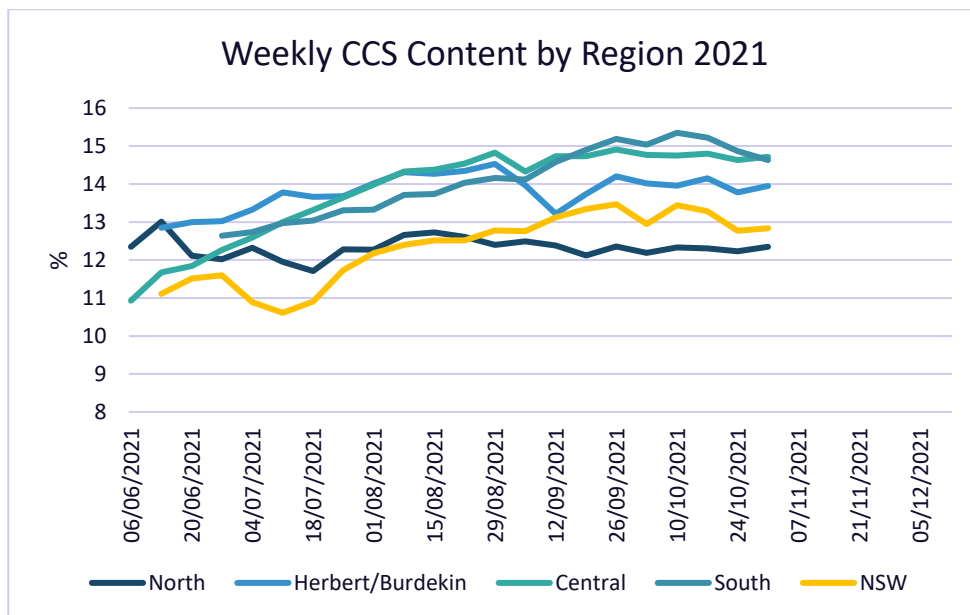
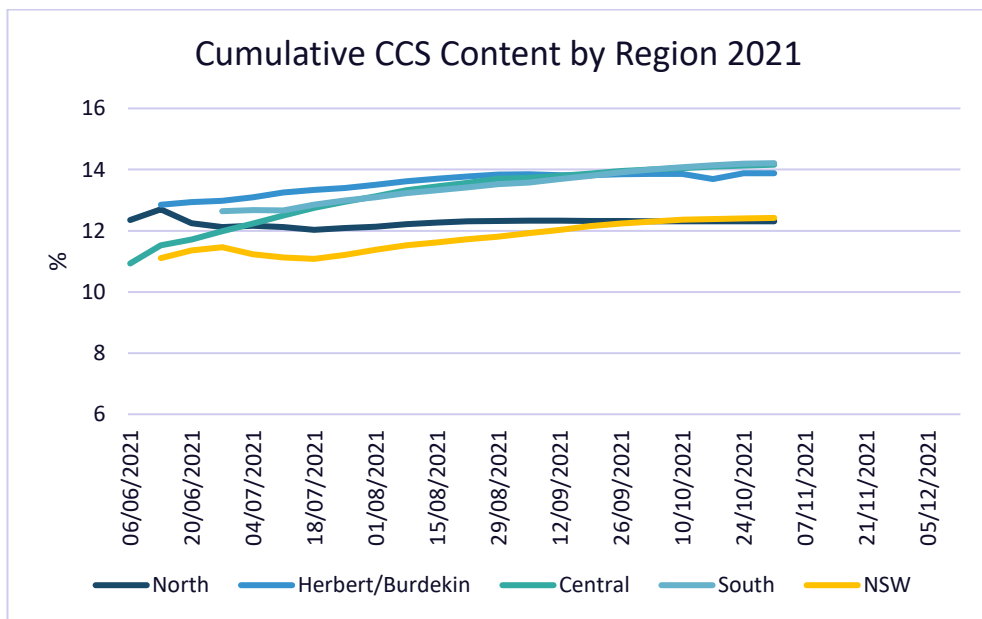


Table 5: Australian Cumulative CCS Content by Region (%)

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	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							
17/10/2021							
24/10/2021							
30/10/2021							

Source: ASMC, WKS Estimates.





PRESS REPORT

Target 34 – A Pathway to Sustainable QLD Cane Supply

After months of analysis and discussions with members, the ASMC has released its Target 34 paper. Written and prepared by the ASMC secretariat, the paper outlines the importance of achieving 34 mln tonnes (T34) of consistent Queensland cane supply per annum, a potential pathway, and a number of commercial and public reform suggestions to get there. The paper is released for debate and discussion and as an input to the development of the 2040 Industry Roadmap. Flat cane yields and falling cane area is causing reduced cane supply growth which in turn is creating greater mill capacity under-utilisation. Coupled with a lack of revenue diversification, Queensland sugar industry operations will continue to be placed under financial stress if left unaddressed. The ASMC supports three objectives in response: (1) Increase cane yields and Queensland cane supply from a 10-year average of 30.4 mln tonnes to a consistent 34 mln tonnes/year (within 10 years); (2) maintain the net area under sugarcane; and (3) increase revenues from complementary, diversified, value-add streams.

[ASMC](#) October

Pilot plant turning sugarcane waste into jet fuel, diesel, plastics prepares to flick switch

Just metres from a sugarcane mill that is supplying them with a byproduct from the crushing process, the pilot plant is about to flick the switch for the first time. US company Mercurius has teamed up with the Queensland University of Technology (QUT) to trial the technology onsite in Mackay. The plant uses bagasse, a byproduct from the crushing process, to create renewable products that not only reduce the need for fossil fuels but take CO2 from the atmosphere. It converts a range of biomass feed stocks, such as cane bagasse, into "drop-in" fuels that can be tailored to use as jet fuel or diesel, as well as bio-based plastics. Commercial application is still several years away.

[ABC News](#) 15 October

Wilmar Production Reports

Burdekin

Weekly production figures		
Burdekin region mills		
Week 21, ending 30th October 2021		
Cane crushed	This week	Season to date
Invicta	146,210	2,826,725
Pioneer	60,947	1,491,517
Kalamia	76,817	1,450,004
Inkerman	81,176	1,386,917
Burdekin	365,150	7,155,163

Throughput this week was just over 365,000 tonnes. While this was above budget, throughput was limited by unplanned stops at all sites, including power blackouts at Pioneer and Kalamia due to a harvester coming into contact with power lines. The Burdekin mills have now processed over 7 mln tonnes, which represents more than 90% 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 11 November on the north bank and by 20 November on the south bank. The average weekly CCS continues to trend below budget at 14.46.

[Wilmar](#) 30 October

Weekly production figures		
Burdekin region mills		
Week 20, ending 23rd October 2021		
Cane crushed	This week	Season to date
Invicta	133,648	2,680,333
Pioneer	78,116	1,430,570
Kalamia	69,310	1,373,187
Inkerman	75,356	1,305,741
Burdekin	356,430	6,789,831

Throughput this week was just under 360,000 tonnes. While still above budget, throughput was impacted by unplanned stops at all sites. The Burdekin mills have now processed just under 6.8 mln tonnes, which represents more than 86 % of the total estimated crop. Based on forecast factory throughputs and no further rain disruptions, the last day of harvesting at Invicta, Kalamia and Pioneer mills will be 9 November, with Inkerman following on 20 November. The average weekly CCS continues to trend below budget at 14.27.

[Wilmar](#) 23 October

Herbert

Weekly production figures		
Wilmar Sugar		
Herbert region mills		
Week 20, ending 30 October 2021		
	This week	Season to date
Cane crushed		
Victoria	132,535	2,158,518
Macknade	66,133	1,055,831
Total	198,668	3,214,349
Crop forecast	3.89M	
	This week	Season to date
District CCS	13.00	12.72

Almost 200,000 tonnes of cane were crushed for the week, bringing the season-to-date total to just over 3.2 mln tonnes. A slight increase in CCS took the weekly average to 13 units for the first time this crushing season, with the season-to-date average sitting at 12.72 units. Based on a final crop estimate of 3.89 mln tonnes, no further rain disruptions and normal factory operations, harvesting is currently expected to continue until Wednesday 24 November.

[Wilmar](#), 30 October

Weekly production figures		
Wilmar Sugar Herbert region mills Week 19, ending 23 October 2021		
	This week	Season to date
Cane crushed		
Victoria	127,449	2,025,983
Macknade	63,532	989,698
Total	190,981	3,015,681
Crop forecast	3.89M	

Just under 191,000 tonnes of cane were crushed for the week, bringing the total tonnes crushed to more than 3 mln tonnes. Average weekly CCS remains below budget at 12.88 units, with the season to date average at 12.7 units. The continuation of repairs to the failed Victoria B-side trash bar impacted crushing rate early in the week.

[Wilmar](#), 23 October

Plane Creek

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 20, Week ending 30 October 2021		
	This week	Season to date
Cane crushed	65,972	1,112,876
Average bin weight	3.93	3.97
CCS	15.26	14.40

Plane Creek Mill achieved a reasonable throughput for the week with close to 66,000 tonnes crushed. That brought the season-to-date total to just over 1.11 mln tonnes, which represents 82% of the forecast 1.36 mln tonne crop. There was a welcome improvement in CCS of 0.33 a unit over the previous week, taking the season-to-date CCS to 14.40 units.

[Wilmar](#), 30 October

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 19, Week ending 23 October 2021		
	This week	Season to date
Cane crushed	61,516	1,046,904
Average bin weight	3.93	3.97
CCS	14.93	14.35

Plane Creek Mill passed the one million tonnes crushed milestone earlier in the week. The mill has now processed 77 % of the total revised crop of 1.36 mln tonnes. Just over 61,500 tonnes of cane were crushed for the week. Weekly CCS fell below 15 for the first time in six weeks, closing out at 14.93 units. The season-to-date CCS edged higher and settled at 14.35.

[Wilmar](#) 23 October

Proserpine

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 18, ending 30 October 2021		
	This week	Season to date
Cane crushed	88,614	1,339,143
Average bin weight	9.30	9.54
CCS	14.57	14.48

Proserpine Mill processed more than 88,000 tonnes of cane for the week. The factory has now crushed a total of 1.34 mln tonnes – almost 85% of the total estimated crop. The crop continues to cut at about 97 % to estimate. The last day of harvesting for the 2021 season is currently expected to be Thursday 18 November 2021.

[Wilmar](#), 30 October

Weekly production figures		
Wilmar Sugar Proserpine Mill Week 17, ending 23 October 2021		
	This week	Season to date
Cane crushed	82,548	1,250,529
Average bin weight	9.30	9.56
CCS	14.64	14.47

Proserpine Mill processed more than 82,000 tonnes of cane for the week. The factory has now crushed a total of 1.25 mln tonnes – almost 80% of the total estimated crop. Harvesting conditions were disrupted by storms and some hail during the week. The rain also suppressed CCS, which averaged 14.64 units for the week. The crop continues to cut at about 97.4% to estimate. The last day of harvesting for the 2021 season is currently expected to be Thursday 18 November 2021.

[Wilmar](#) 23 October



www.wks-weknowsugar.com | lindsayjolly@wks-weknowsugar.com



www.apic-consulting.com | alexis@apic-consulting.com

Disclaimer

With respect to all the information contained herein, neither APIC Consulting Pte. Ltd, nor We Know Sugar Consulting., nor any officer, servant, employee, agent or consultant thereof make any representations or give any warranties, expressed or implied, as to the accuracy, reliability or completeness of the information contained herein, including but not limited to opinions, information or advice which may be provided to users of the document. No responsibility is accepted to users of this document for any consequence of relying on the contents hereof.