

Harvest Update for the Australian Sugar Industry

Fortnight Ending 12 December 2021

Photo supplied by CANEGROWERS



VOL 4 NO. 14
[16 DECEMBER 2021]

Editor: LINDSAY JOLLY

End-Harvest Still Marred by Wet Weather

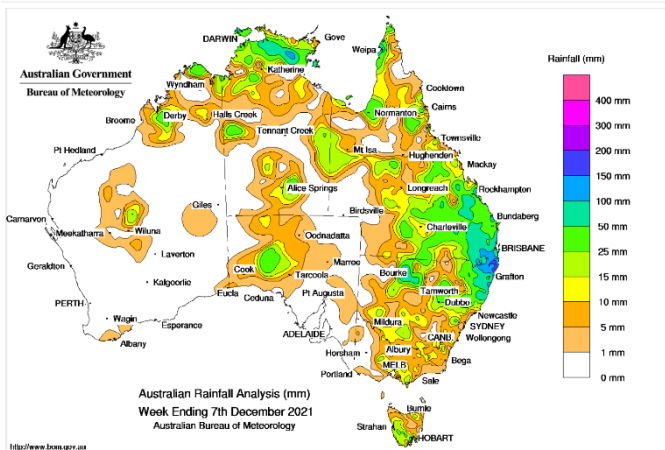
Wet weather [REDACTED]. The weekly crush tonnage has [REDACTED] due to wet weather and as more mills reach crush-out. Tully mill finished their crush on 4 December, and Plane Creek on 12 December. Of Australia's 21 mills, only [REDACTED] are still active compared to [REDACTED] at the end of November. A crush tally of only [REDACTED] tonnes in week 27 was followed by [REDACTED] tonnes in week 28 (week ending 12 December). Around [REDACTED] tonnes of cane remain in the field, representing around [REDACTED] of the likely total crush. The remaining tonnage is in Queensland, centred in the Mackay Sugar area and also in the Southern region (Isis mill and Rocky Point mill). Mackay sugar had around [REDACTED] tonnes remaining to be crushed on 12 December and faces a crush-out date past Christmas. In the South, the Isis mill has reached almost [REDACTED] crushed (there have been issues with the transshipment of cane from the Maryborough mill area but also more recently with wet weather). The small Rocky Point mill is slated to end their harvest on 17 December, even if some cane remains in the field (possibly as much as [REDACTED] tonnes).

Crush Tonnage Remains [REDACTED] mln Tonnes Lower

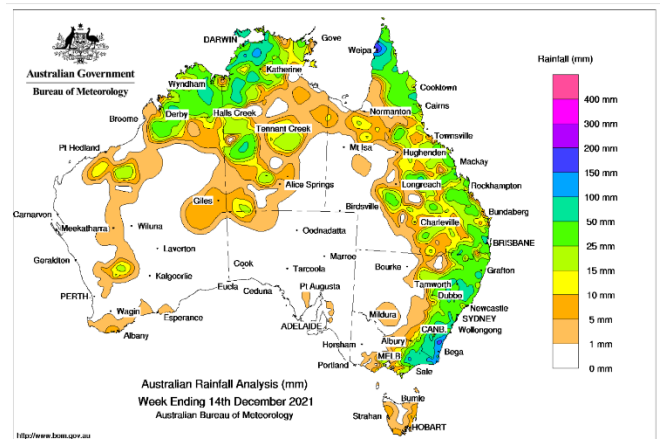
The fourteenth fortnight saw the cumulative Australian crush volume reach [REDACTED] mln tonnes. The comparable figure last season was around [REDACTED] mln tonnes higher at [REDACTED] mln tonnes. Both seasons suffered rain interruptions, but this year's harvest has been blighted by more frequent interruptions compounded by mill performance issues in some areas, as well as by lower tonnages in some mill areas than originally expected. Queensland's to-date crush had reached [REDACTED] mln tonnes and the NSW industry crushed out on [REDACTED] November having crushed [REDACTED] mln tonnes. The to-date CCS level for the Australian industry has fallen further behind last season, at [REDACTED] units compared to [REDACTED] units.

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. With the reduced tonnage and the early plateauing in CCS levels, WKS anticipates that sugar production from the 2021 crush will likely reach no more than [REDACTED] mln tonnes (4 [REDACTED] [REDACTED]), assuming the remaining [REDACTED] tonnes of cane can still be harvested.

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



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



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

Fig. 1 Australia: Weekly Crush

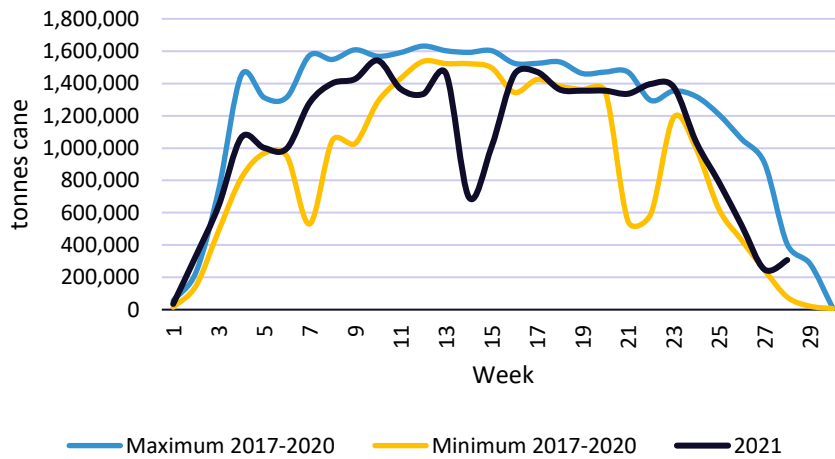


Fig. 2 Australia: Cumulative Weekly Crush

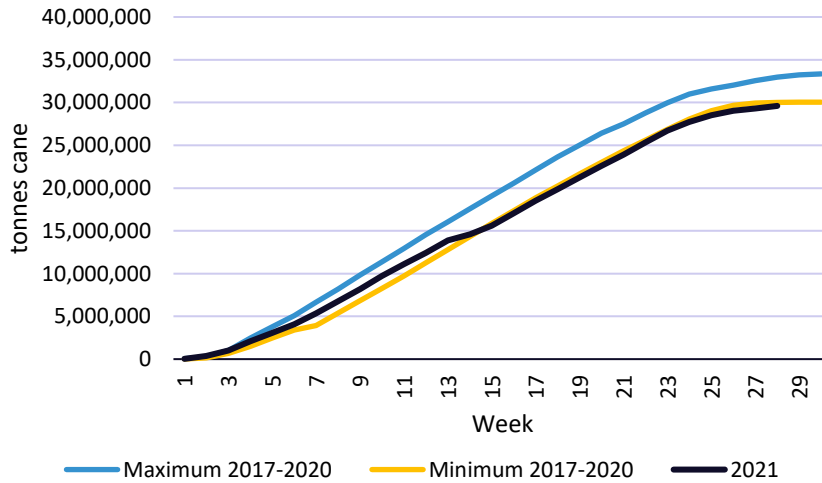
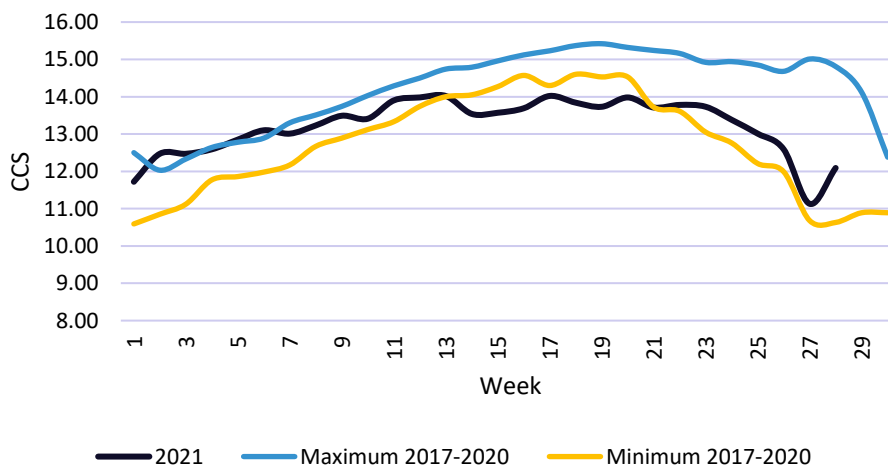


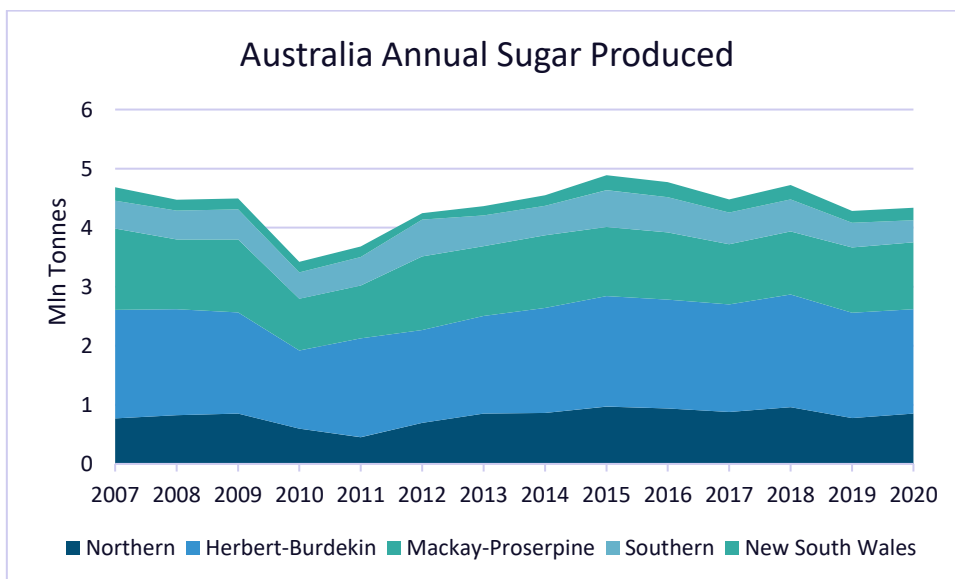
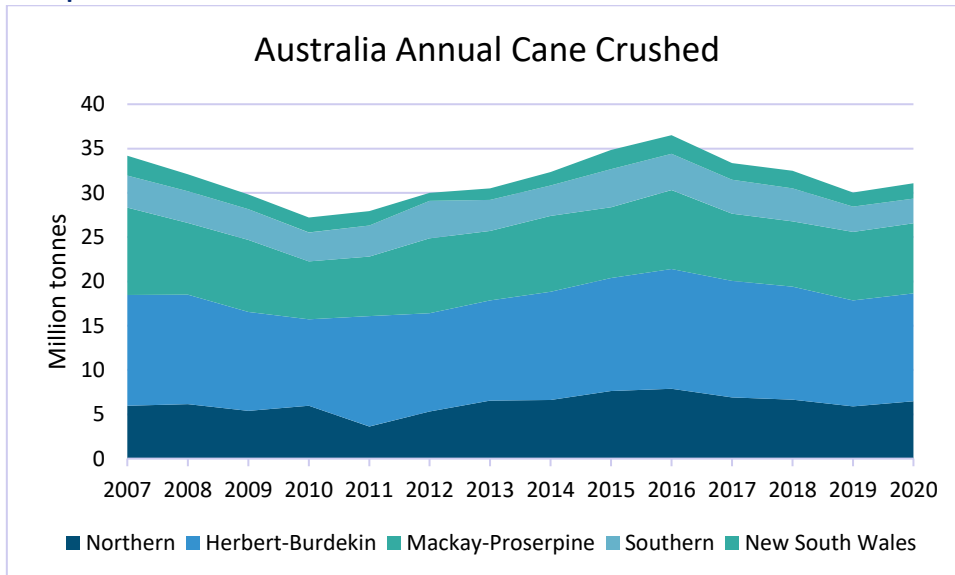
Fig. 3 Australia Weekly CCS



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	1,355,208	22,594,612	13.98	13.55
24/10/2021	1,336,279	23,930,890	13.71	13.56
30/10/2021	1,396,908	25,327,798	13.78	13.57
7/11/2021	████████	████████	████	████
14/11/2021	████████	████████	████	████
21/11/2021	████████	████████	████	████
28/11/2021	████████	████████	████	████
5/12/2021	████████	████████	████	████
12/12/2021	████████	████████	████	████

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
20/11/2020	1,040,025	29,797,979	14.14	13.77
27/11/2020	801,205	30,599,184	13.88	13.78
4/12/2020	397,389	30,996,572	13.04	13.77
11/12/2020	77,813	31,074,385	13.02	13.75

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	306,431	554,326	368,031	91,736	1,320,524	34,684	1,355,208
24/10/2021	287,692	547,593	332,925	115,432	1,283,642	52,637	1,336,279
30/10/2021	308,796	563,818	347,188	102,764	1,322,566	74,342	1,396,908
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							

Source: ASMC, WKS Estimates.

Weekly Crush by Region 2021

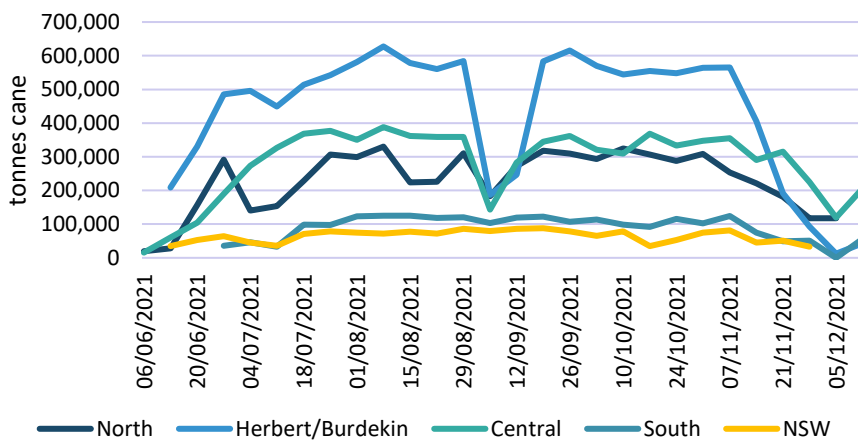


Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

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	4,719,157	9,258,101	5,664,568	1,678,064	21,319,890	1,274,722	22,594,612
24/10/2021	5,006,849	9,805,694	5,997,492	1,793,496	22,603,531	1,327,359	23,930,890
30/10/2021	5,315,645	10,369,512	6,344,680	1,896,260	23,926,097	1,401,701	25,327,798
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							

Source: ASMC, WKS Estimates.

Cumulative Weekly Crush by Region 2021

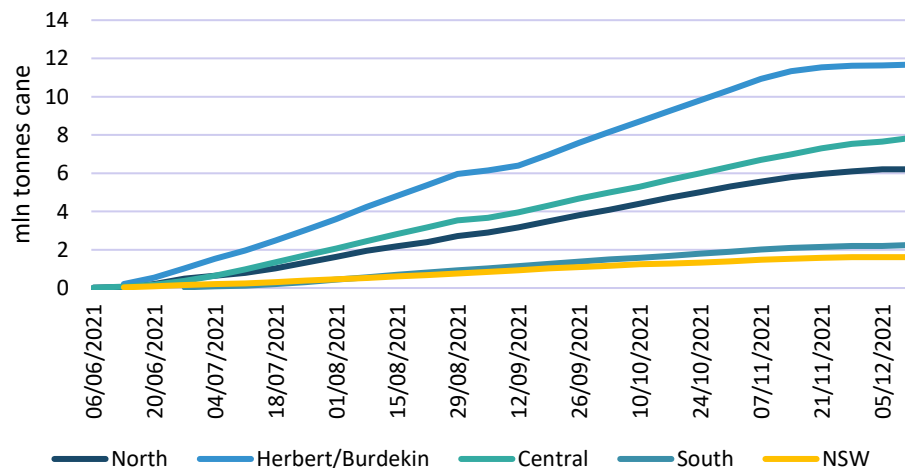


Table 4: Australian CCS Content by Region (%)

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	12.31	14.15	14.80	15.22	14.00	13.28	13.98
24/10/2021	12.23	13.78	14.63	14.87	13.75	12.77	13.71
30/10/2021	12.35	13.95	14.72	14.63	13.83	12.84	13.78
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							

Source: ASMC, WKS Estimates.

Weekly CCS Content by Region 2021

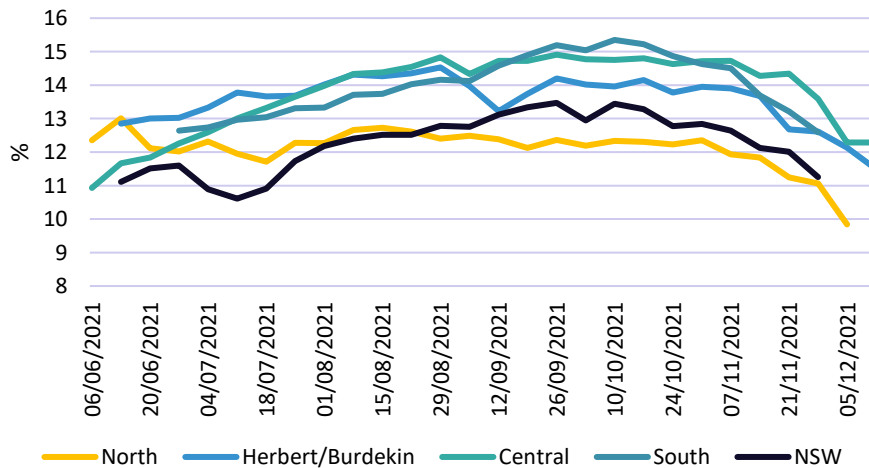
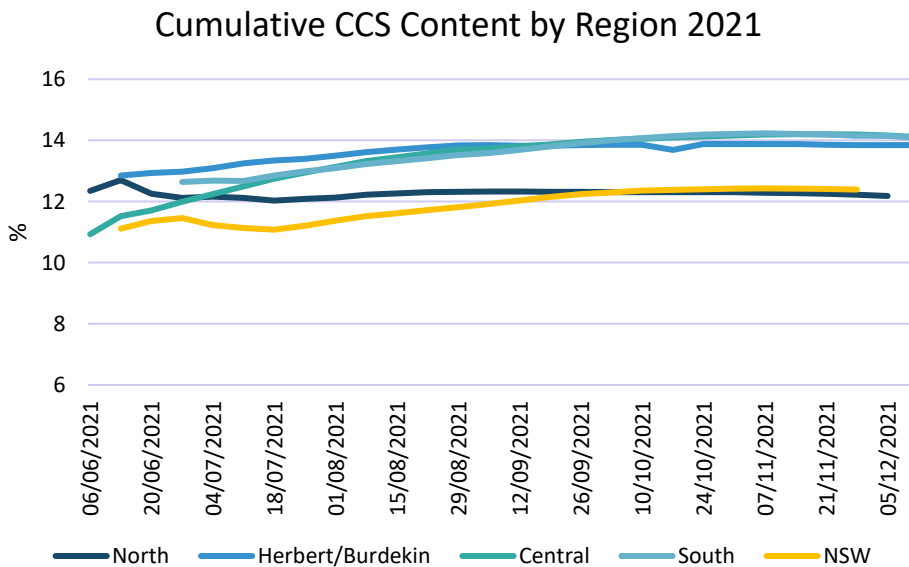


Table 5: Australian Cumulative CCS Content by Region (%)

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	12.31	13.69	14.10	14.14	13.62	12.38	13.55
24/10/2021	12.31	13.88	14.13	14.19	13.62	12.40	13.56
30/10/2021	12.31	13.88	14.16	14.21	13.64	12.42	13.57
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							

Source: ASMC, WKS Estimates.





PRESS REPORT

Australia's WTO sugar win

Ruling in favour of Australia, Brazil and Guatemala, the WTO Panel found:

- For five consecutive sugar seasons (2014-15 to 2018-19), India's domestic price support was in excess of the permitted level (10% of the value of the season's sugarcane production). The Panel found that India had consistently provided support close to 100%. The Panel has recommended India reduce the measures to comply.
- India's export-contingent payments to sugar mills constitute prohibited subsidies. The Panel recommended India withdraw the subsidies within 120 days from the adoption of the Report by the WTO Dispute Settlement Body.

The Panel report will be considered at the 25 January 2022 meeting of the WTO Dispute Settlement Body and, unless appealed by India, will be adopted at that meeting. India has the right to appeal the decision to the WTO Appellate Body.

[CANEGROWERS](#) 15 December

Sugar industry welcomes win in WTO case against Indian subsidies

Australia has secured an emphatic World Trade Organization (WTO) win against India's price-distorting sugar production measures and export subsidies. Handing down its report last night, the WTO Panel found that India had prohibited export subsidies and recommended their removal within 120 days from the adoption of the Report by the WTO Dispute Settlement Body. The Panel also found that India's levels of domestic support (as provided through a range of government schemes to support the price of sugarcane) has consistently exceeded India's permitted levels under WTO Agreements.

Peak Australian sugar industry organisations the Australian Sugar Milling Council (ASMC) and CANEGROWERS have welcomed the Panel's findings and recommendations. The ASMC had earlier referred to India's subsidies and the export of its surplus sugar having cost Australian cane growers and sugar millers AUD 1 billion in foregone revenue between 2017-18 and 2020-21 (according to calculations by GreenPool).

ASMC and CANEGROWERS have called on the Indian Government to embrace the findings of the Panel, bring its policies into WTO compliance and commence development of long overdue industry reforms. ASMC and CANEGROWERS thank the Australian Government, in particular Trade Minister Dan Tehan, for its commitment to a fair and level trading environment and their advocacy on behalf of the sugar industry.

[ASMC](#) 15 December

Wilmar Production Reports
Burdekin

Weekly production figures		
Burdekin region mills		
Week 27, ending 11th December 2021		
Cane crushed	This week	Season to date
Invicta	0	3,050,914
Pioneer	0	1,625,328
Kalamia	0	1,552,308
Inkerman	43,117	1,654,431
Burdekin		7,882,981

Just over 43,000 tonnes were processed in the final week of crushing at Inkerman Mill, bringing the 2021 Burdekin crushing season to a close. The total season throughput for the Burdekin region was 7.88 mln tonnes. The average weekly CCS fell to 11.49 due to the continued wet conditions. The provisional season CCS is 14.38 units.

[Wilmar](#) 13 December

Weekly production figures		
Burdekin region mills		
Week 26, ending 04th December 2021		
Cane crushed	This week	Season to date
Invicta	0	3,050,914
Pioneer	0	1,625,328
Kalamia	0	1,552,308
Inkerman	12,360	1,611,314
Burdekin		7,839,864

Just under 12,000 tonnes of cane were crushed at Inkerman for the week, due to wet weather putting a stop to all harvesting at the beginning of the week. The average weekly CCS fell to 12.13 due to the continued wet conditions. Harvesting is expected to finish this week, depending on weather and mill performance.

[Wilmar](#) 6 December

Plane Creek

Weekly production figures		
Wilmar Sugar		
Plane Creek Mill		
Week 26, Week ending 12 December 2021		
	This week	Season to date
Cane crushed	28,119	1,367,480
Average bin weight	3.54	3.93
CCS	12.26	14.34

Plane Creek Mill wrapped up the 2021 crushing season on Sunday 12 December. The mill processed just over 28,000 tonnes of sugarcane in its final week, bringing the total for the 2021 season to 1.367 mln tonnes. CCS improved slightly from the previous week. The final season CCS was 14.34 units.

[Wilmar](#) 13 December

Weekly production figures		
Wilmar Sugar Plane Creek Mill Week 25, Week ending 04 December 2021		
	This week	Season to date
Cane crushed	7,895.56	1,339,361
Average bin weight	3.89	3.94
CCS	12.15	14.38

Plane Creek Mill crushed just under 8,000 tonnes of cane for the week. Crushing got under way on Sunday 28 November, following a wet weather stop the previous week and a delayed re-start due to wet boiler fuel. Unfortunately, a significant weather event brought harvesting operations to a halt for the remainder of the week. Harvesting is expected to finish this week.

[Wilmar](#) 6 December



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.