

Harvest Update for the Australian Sugar Industry



Fortnight Ending 28 November 2021

Photo supplied by CANEGROWERS



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Editor: LINDSAY JOLLY

Australian Cane Harvest Nears Completion

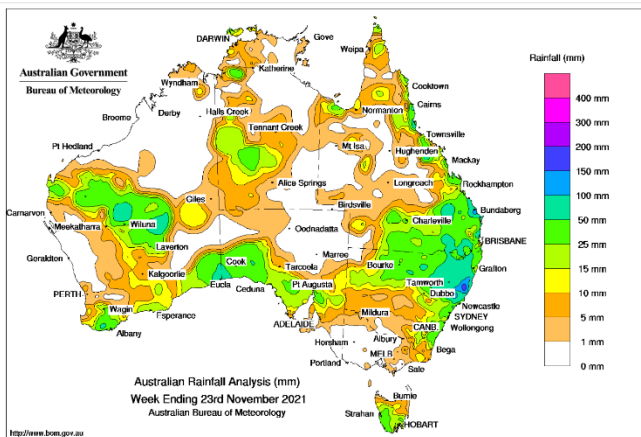
The Australian crush tonnage is dropping sharply as more mills crush-out. A tally ██████ tonnes in week 25 was followed by ██████ tonnes in week 26 (week ending 28 November), albeit that figure was further reduced by wet weather. The cane crush is now almost complete with only ██████ of the crop remaining in the field. The bulk of the remaining tonnage is in the Central (Mackay Sugar) and Southern region (Isis mill) of Queensland. The Mackay mill faces a crush-out date of 25 December with ██████ of their estimated 5.3 mln tonnes cane yet to be harvested. In the South, the Isis mill has reached ██████ crushed (there have been issues with the transshipment of cane from the Maryborough mill area but also more recently with wet weather). With wet weather prevalent across the whole industry, there are difficulties in harvesting remaining cane. For instance, Wilmar’s Inkerman mill in the Burdekin has just 45,000 tonnes of cane left to harvest, however wet ground conditions are making it difficult to get harvesting equipment in. The recent weather event brought harvesting operations to a halt at their Plane Creek Mill.

Crush Tonnage 1.5 mln Tonnes Lower

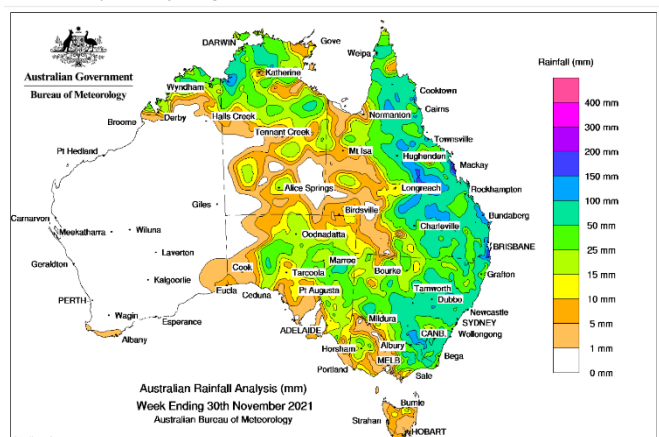
The thirteenth fortnight saw the cumulative Australian crush volume reach ██████ mln tonnes. The comparable figure last season was around ██████ tonnes higher at 30.60 mln tonnes. Both seasons have suffered rain interruptions, but this year’s harvest has been blighted by ██████ Queensland’s to-date crush had reached ██████ mln tonnes and the NSW industry reached 1.61 mln tonnes. The to-date CCS level for the Australian industry has ██████ The impact of persistent wet weather events on this season’s weekly sugar content in cane is clearly evident, with CCS ██████ since early September.

Australia’s cane crush is now estimated at ██████ mln tonnes as against an initial estimate of 31.4 mln tonnes, and last season’s tally of 31.07 mln tonnes. With the reduced tonnage and the early plateauing in CCS levels, WKS anticipates that sugar production from the 2021 crush will ██████

Rainfall totals map for the 7 days ending 9 am 23 November 2021



Rainfall totals map for the 7 days ending 9 am 30 November 2021



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

Fig. 1 Australia: Weekly Crush

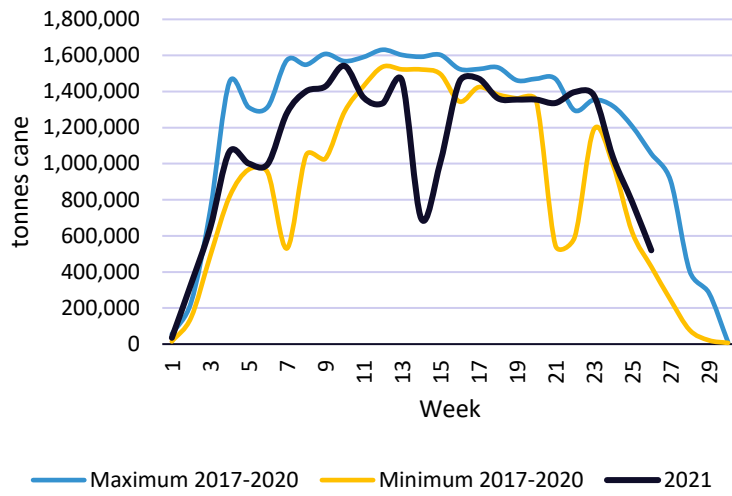


Fig. 2 Australia: Cumulative Weekly Crush

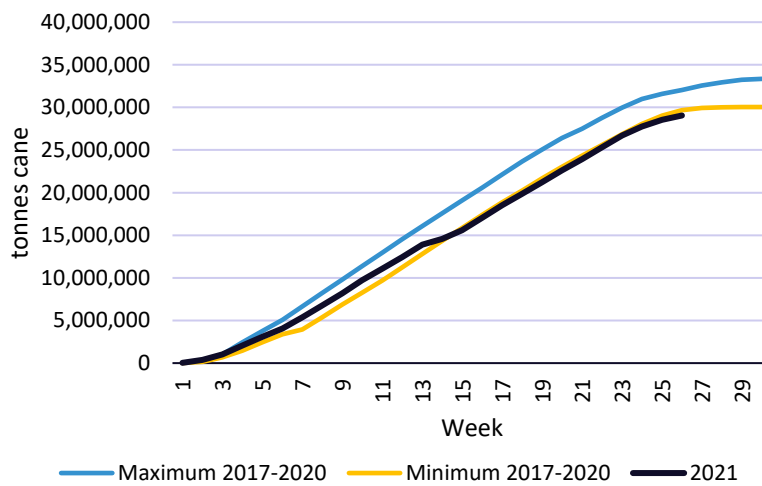
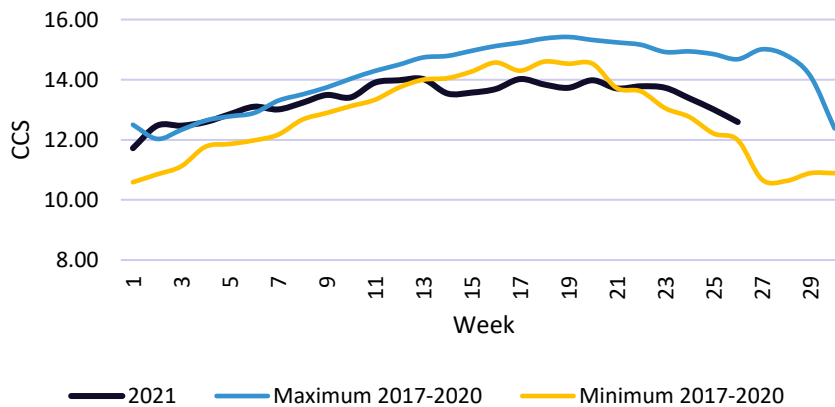


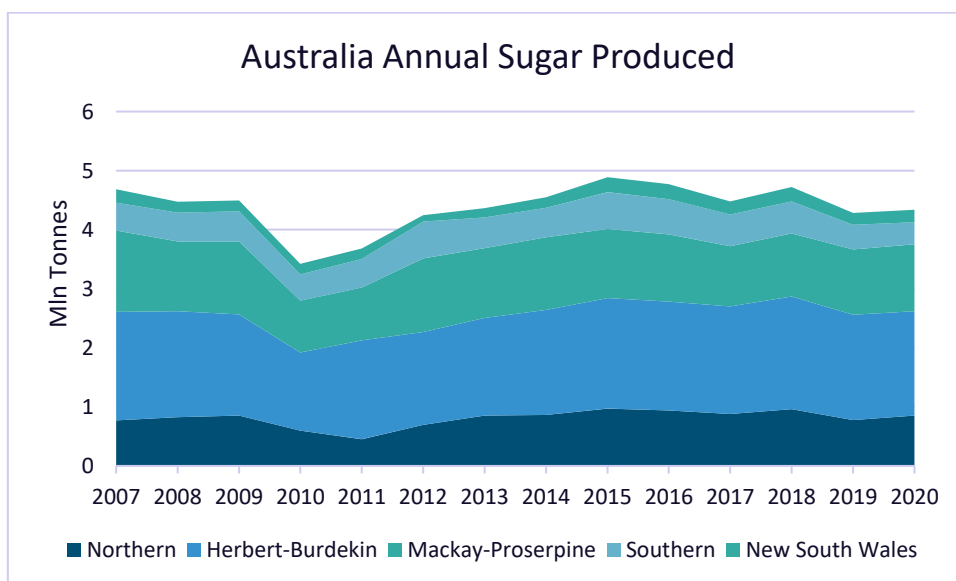
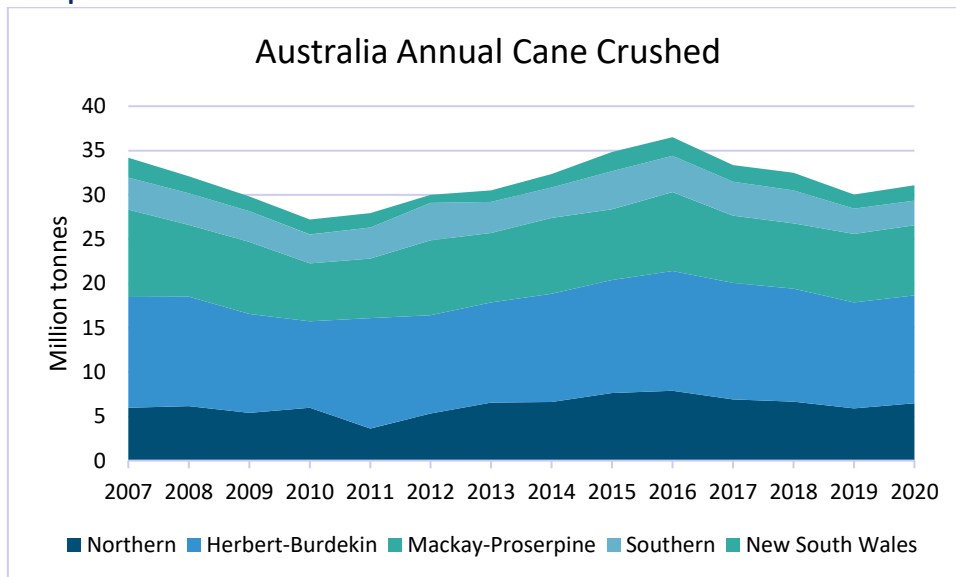
Fig. 3 Australia Weekly CCS



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	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	██████████	██████████	██████	██████
7/11/2021	██████████	██████████	██████	██████
14/11/2021	██████████	██████████	██████	██████
21/11/2021	██████████	██████████	██████	██████
28/11/2021	██████████	██████████	██████	██████

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
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

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							
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							

Source: ASMC, WKS Estimates.

Weekly Crush by Region 2021

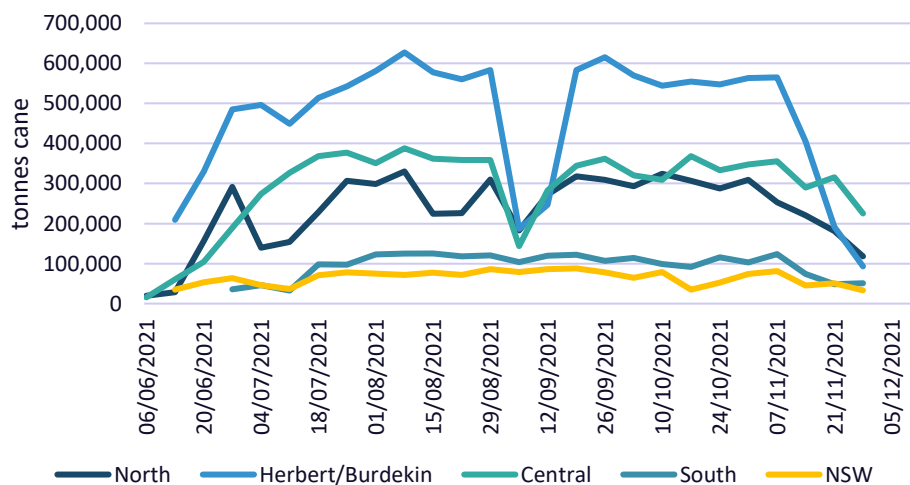


Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

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	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							
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							

Source: ASMC, WKS Estimates.

Cumulative Weekly Crush by Region 2021

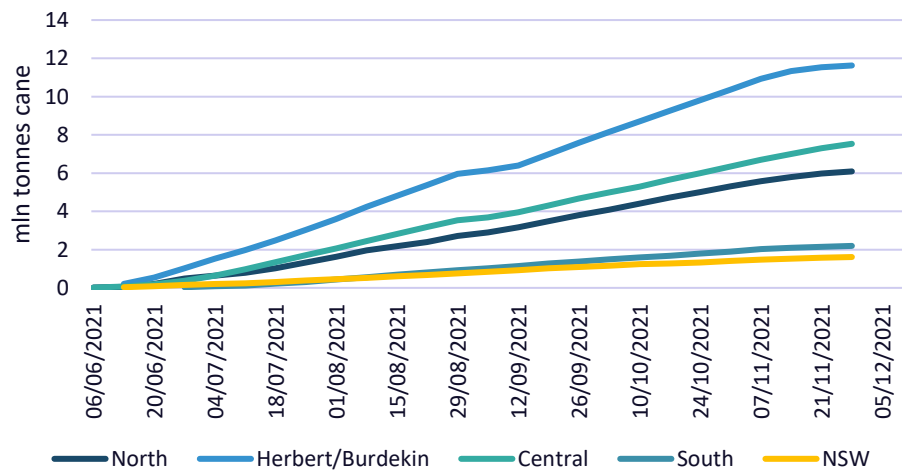


Table 4: Australian CCS Content by Region (%)

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	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							
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							

Source: ASMC, WKS Estimates.

Weekly CCS Content by Region 2021

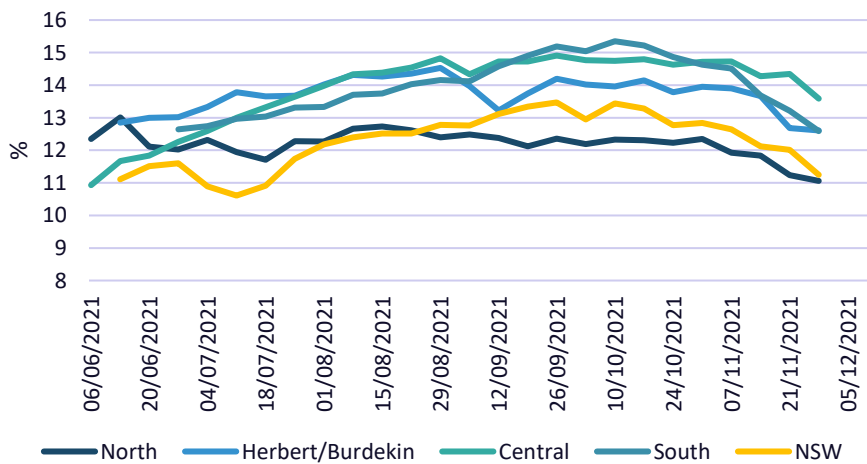
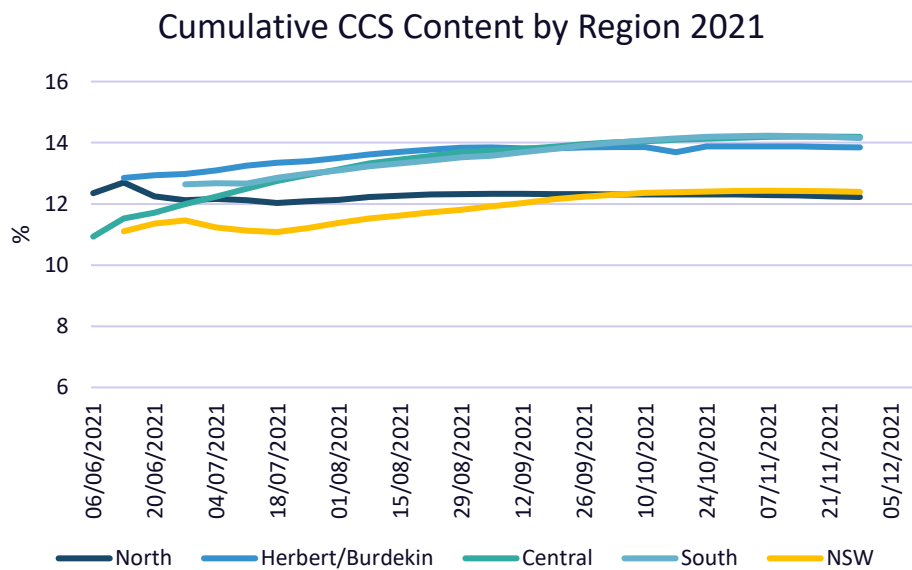


Table 5: Australian Cumulative CCS Content by Region (%)

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							
7/11/2021							
14/11/2021							
21/11/2021							
28/11/2021							

Source: ASMC, WKS Estimates.





PRESS REPORT

Win for growers in face of costly regulations - Canegrowers

CANEGROWERS has secured valuable recognition for Smartcane BMP accredited growers through persistent representations to the Queensland Government over its regulation of farm practices. The Government planned to make every cane farmer engage an ‘appropriate person’ to develop and sign off on their fertiliser plans, completely disregarding the decades of experience of thousands of sugarcane growers in Queensland, according to CANEGROWERS. The organization lobbied against the new regulation asking, at the very least, for an exemption for growers who are accredited under the Smartcane BMP program along with clear guidelines of how it would work for other growers. The Government has now accepted that Smartcane BMP accredited growers do not need to engage an appropriate person. Smartcane growers manage 650 accredited cane farming businesses covering 35% of Queensland’s cane area and have already been independently audited as operating at or above industry best practice. This standard is above what is required by regulation.

[CANEGROWERS](#) 27 November

Wilmar Production Reports

Burdekin

Weekly production figures		
Burdekin region mills		
Week 25, ending 27th November 2021		
Cane crushed	This week	Season to date
Invicta	0	3,050,914
Pioneer	0	1,625,328
Kalamia	0	1,552,308
Inkerman	38,611	1,598,954
Burdekin	38,611	7,827,503

Just under 39,000 tonnes crushed at Inkerman this week due to wet weather and the challenges of processing stale cane in bins. The average weekly CCS dropped to 12.81, which is below budget due to the rain. There is only about 45,000 tonnes of cane left to harvest however wet ground conditions are making it difficult to get harvesting equipment in.

[Wilmar](#) 29 November

Weekly production figures		
Burdekin region mills		
Week 24, ending 20th November 2021		
Cane crushed	This week	Season to date
Invicta	0	3,050,914
Pioneer	0	1,625,328
Kalamia	0	1,552,308
Inkerman	24,657	1,560,340
Burdekin	24,657	7,788,890

Just under 25,000 tonnes crushed at Inkerman this week due to a combination of wet weather, a boiler failure and challenges processing the stale cane in bins. The average weekly CCS dropped to 13.66, which is below budget due to the rain.

[Wilmar](#) 22 November

Herbert

Weekly production figures		
Wilmar Sugar Herbert region mills Week 24, ending 27 November 2021		
	This week	Season to date
Cane crushed		
Victoria	39,507	2,550,078
Macknade	14,849	1,247,180
Total	54,356	3,797,258
Crop forecast	3.8M	

The Herbert region's 2021 crushing season was finalised at Victoria Mill on Wednesday 25 November. A combined total of 3,797,248 tonnes of cane was crushed at Wilmar's Victoria and Macknade mills for the season. The average CCS for the season was 12.73 units, which is 0.46 of a unit below the 2020 season average.

[Wilmar](#) 29 November

Weekly production figures		
Wilmar Sugar Herbert region mills Week 23, ending 20 November 2021		
	This week	Season to date
Cane crushed		
Victoria	111,089	2,510,571
Macknade	55,905	1,23,331
Total	166,904	3,742,902
Crop forecast	3.8M	

Just under 167,000 tonnes of cane were crushed for the week, bringing the season-to-date total to 3.74 mln tonnes. Falls of between 35mm and 170mm across the Herbert district disrupted harvesting and crushing operations. There was a slight decrease in CCS levels with the season-to-date now sitting on 12.73 units. It is envisaged that the last day of crushing for the Herbert will be this Wednesday, 24 November.

[Wilmar](#), 22 November

Plane Creek

Weekly production figures

Wilmar Sugar Plane Creek Mill Week 24, Week ending 27 November 2021		
	This week	Season to date
Cane crushed	45,901	1,331,466
Average bin weight	3.75	3.94
CCS	13.27	14.40

Plane Creek Mill crushed just under 46,000 tonnes of cane for the week. Persistent rain across the region during the latter part of the week had a major impact on cane supply. Average weekly CCS was 13.26, well down from the previous week's 14.58 units due to the wet field conditions. The highest CCS was 15.90 units. The recent weather event has brought harvesting operations to a halt.

[Wilmar](#) 30 November

Weekly production figures

Wilmar Sugar Plane Creek Mill Week 23, Week ending 20 November 2021		
	This week	Season to date
Cane crushed	61,958	1,285,565
Average bin weight	3.82	3.95
CCS	14.58	14.44

Plane Creek Mill crushed just shy of 62,000 tonnes of cane for the week. That brought the season-to-date total to more than 1.28 million tonnes, which represents 93 per cent of the forecast 1.39 million tonne crop. Throughput was disrupted on Monday due to issues with the massecuite re-heater and associated pump. CCS edged higher by 0.25 of a unit over the previous week and the season-to-date CCS closed out at 14.44. The highest CCS for the week was 17.00 units from a rake of Q200 3R in the Bolingbroke productivity district. Subject to weather and mill performance, harvesting operations at Plane Creek are expected to finish on Friday 3 December.

[Wilmar](#), 22 November

Proserpine**Weekly production figures**

Wilmar Sugar Proserpine Mill Week 21, ending 20 November 2021		
	This week	Season to date
Cane crushed	53,624	1,556,291
Average bin weight	8.75	9.46
CCS	13.60	14.43

Proserpine Mill processed close to 54,000 tonnes of cane for the final week of the 2021 season, bringing the total season throughput to 1.56 mln tonnes. The last cane for the season was crushed on Friday 19 November. Average weekly CCS dropped to 13.60 units, bringing the preliminary season CCS to 14.43 units.

[Wilmar](#), 22 November



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