

Harvest Update for the Australian Sugar Industry

Season Final
3 Weeks Ending 2 January 2022

Photo supplied by CANEGROWERS



VOL 4 NO. 15
[6 JANUARY 2022]

Editor: LINDSAY JOLLY

Season Closes 29 December with 31.1 mln Tonnes Cane Crushed

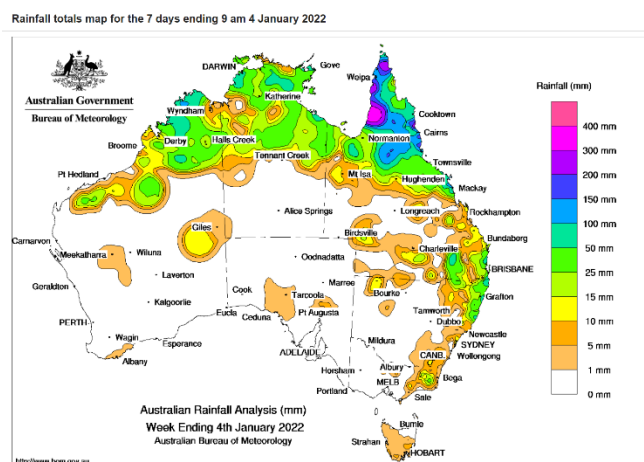
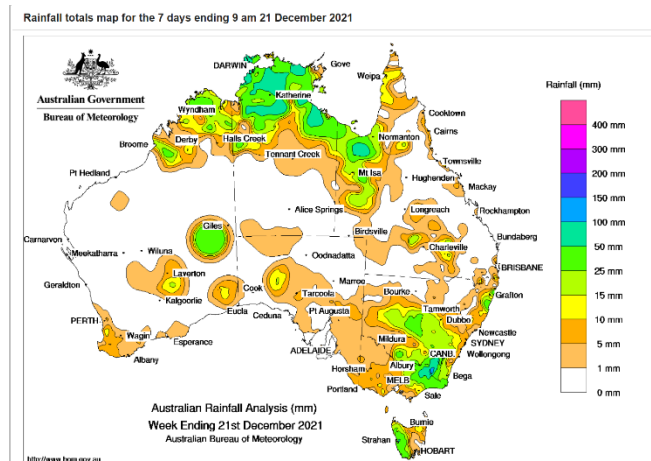
The Australian cane harvest has ended after a 31-week campaign with the final tally reaching 30.1 mln tonnes crushed. [REDACTED] and crush with the season prolonged by an additional [REDACTED] weeks compared to last year. The last of the mills in the [REDACTED] did not finish until [REDACTED] December, an exceptionally late and atypical event. Overall, this season's cane tally was lower than originally anticipated at the start of the season with a preliminary forecast of [REDACTED] mln tonnes. The final outcome of 30.1 mln tonnes compares to last season's tally of [REDACTED] tonnes – a decline of [REDACTED] mln tonnes.

Raw Sugar Production Close to [REDACTED] mln tonnes

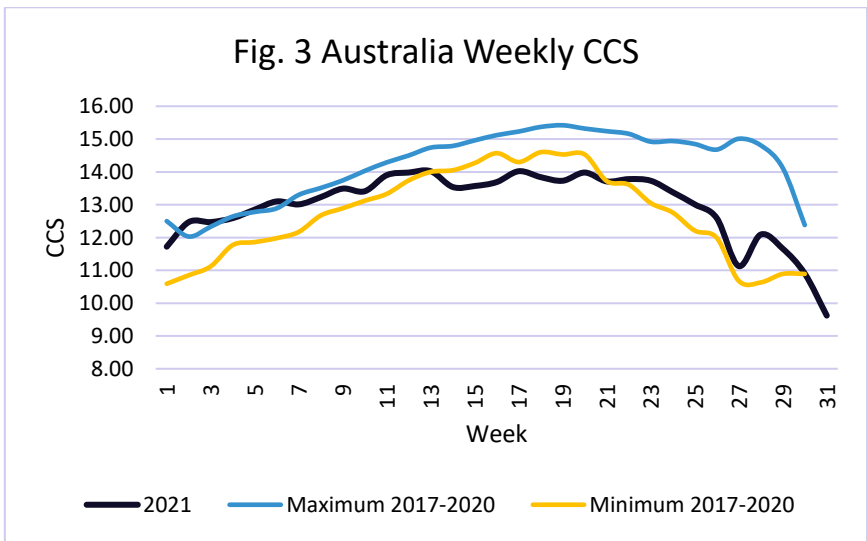
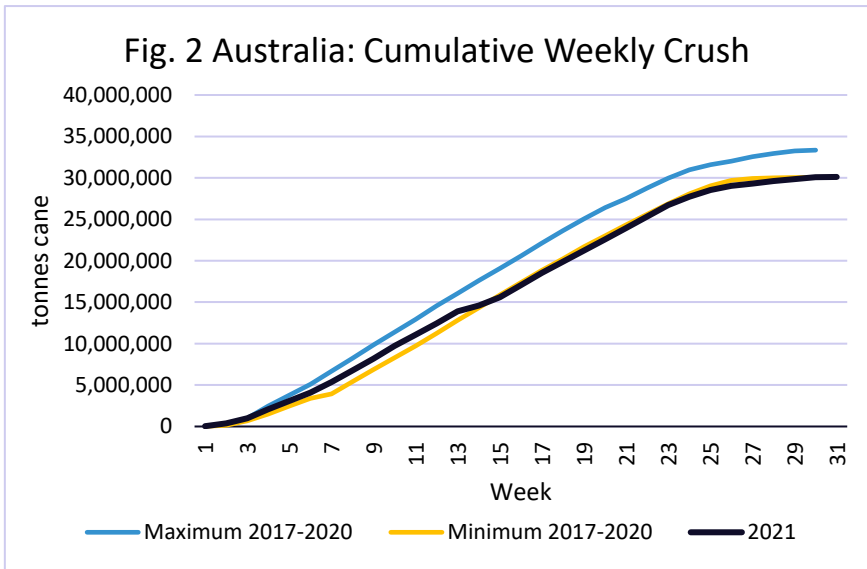
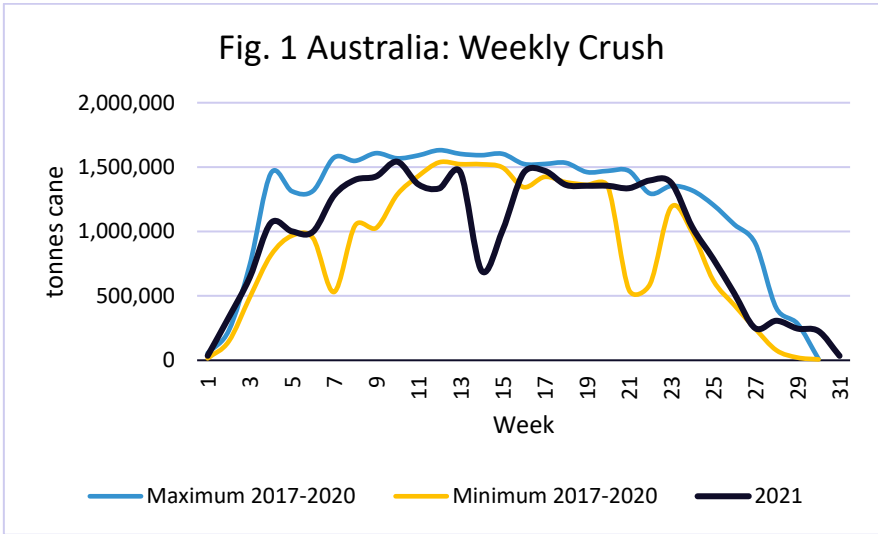
The ASMC has just recently indicated around [REDACTED] mln tonnes of sugar was produced, their first indication in terms of a sugar output assessment. Last report, WKS suggested that with a reduced cane tonnage and the early plateauing in CCS levels, sugar production from the 2021 crush would likely reach no more than [REDACTED] mln tonnes (4.335 mln tonnes last season).

Season Final

This is our final update for the 2021 crush. To all our subscribers we thank you for your continued support and please be assured of our very best wishes for a happy and prosperous 2022.



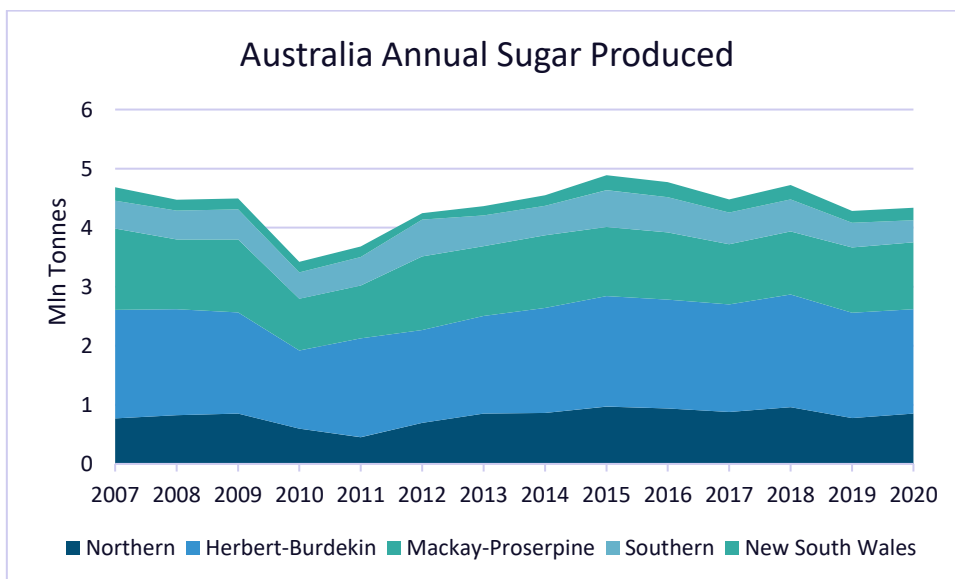
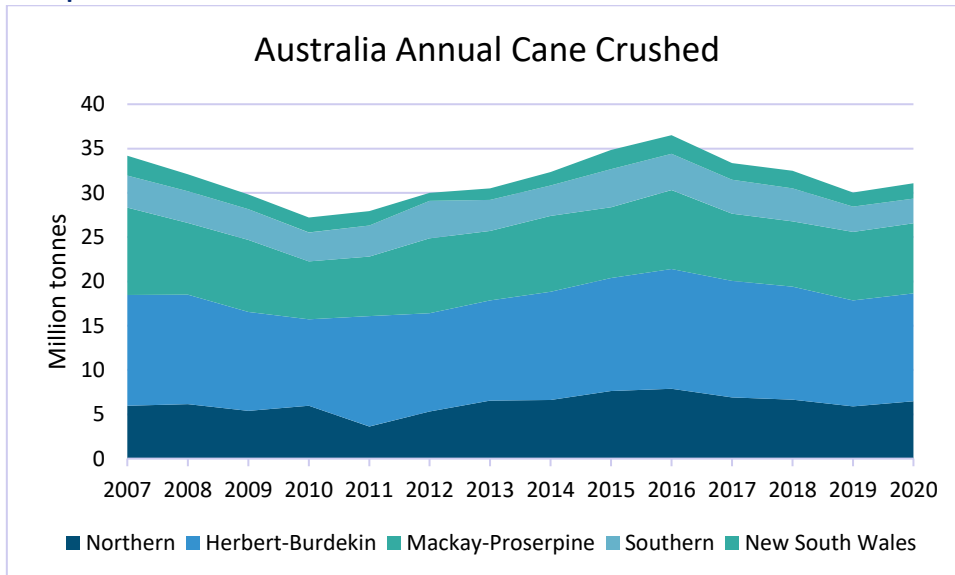
<http://www.bom.gov.au/climate/rainfall/>



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	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	1,379,184	26,706,987	13.73	13.58
14/11/2021	1,035,946	27,742,934	13.38	13.57
21/11/2021	████████	████████	██████	██████
28/11/2021	████████	████████	██████	██████
5/12/2021	████████	████████	██████	██████
12/12/2021	████████	████████	██████	██████
19/12/2021	████████	████████	██████	██████
26/12/2021	████████	████████	██████	██████
2/01/2022	██████	████████	██████	██████

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	253,103	565,302	355,411	123,914	1,297,730	81,454	1,379,184
14/11/2021	220,666	405,327	290,285	74,395	990,673	45,273	1,035,946
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							
19/12/2021							
26/12/2021							
2/01/2022							

Source: ASMC, WKS Estimates.

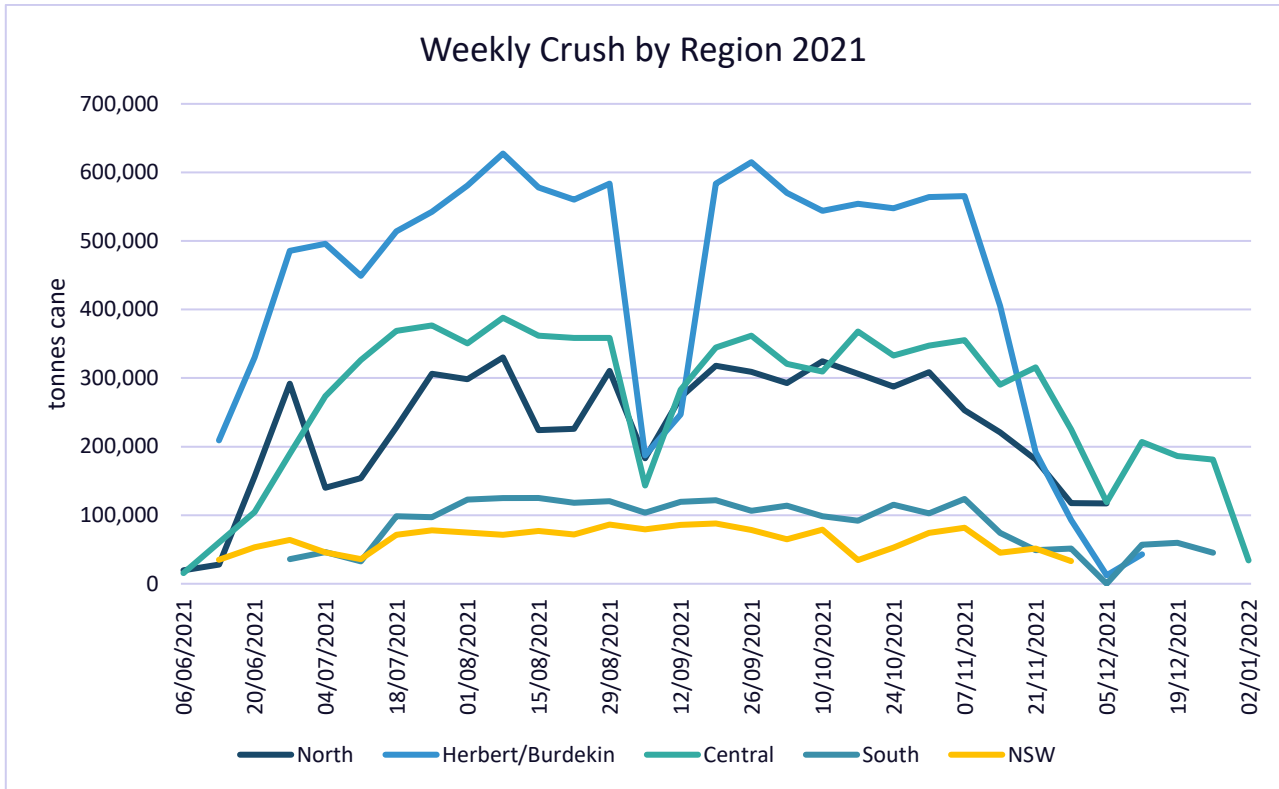


Table 3: Australian Cumulative Weekly Crush by Region (tonnes)

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	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	5,568,753	10,934,814	6,700,091	2,020,174	25,223,832	1,483,155	26,706,987
14/11/2021	5,789,419	11,340,141	6,990,377	2,094,569	26,214,506	1,528,428	27,742,934
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							
19/12/2021							
26/12/2021							
2/01/2022							

Source: ASMC, WKS Estimates.

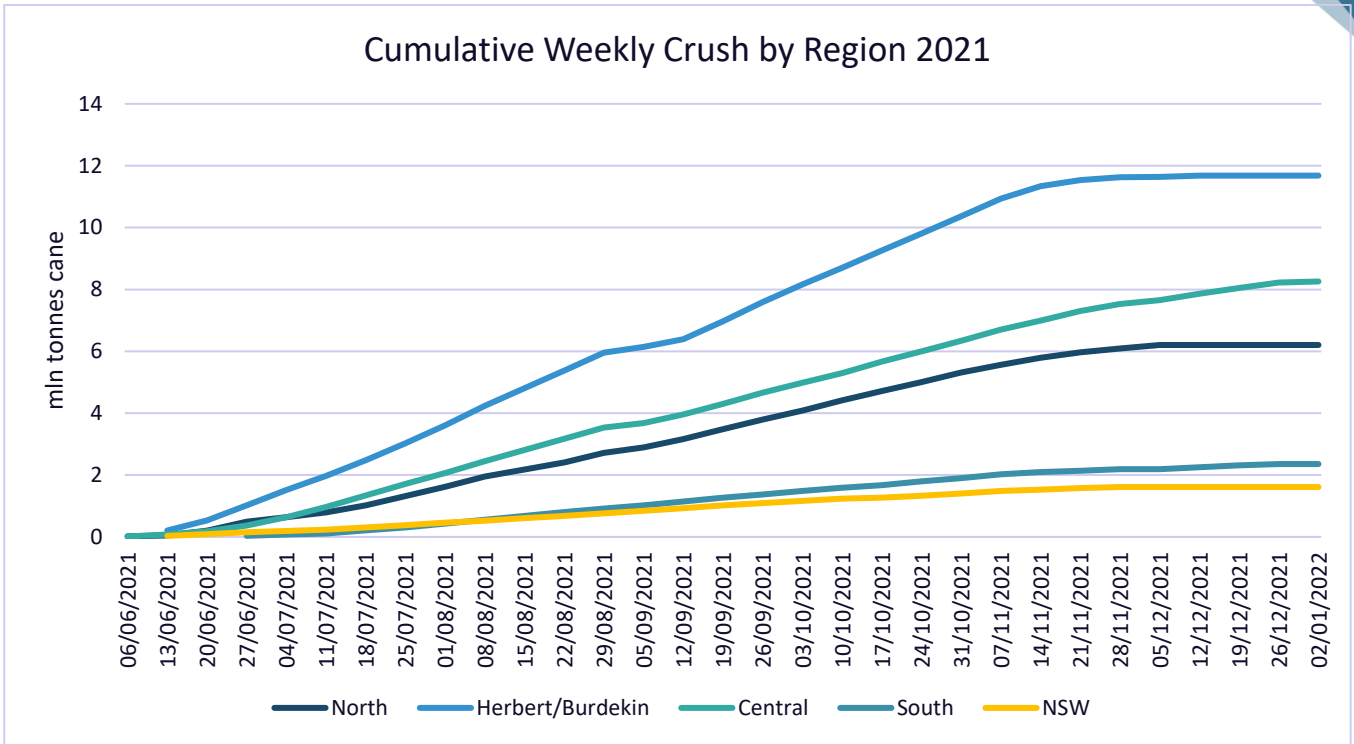


Table 4: Australian CCS Content by Region (%)

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	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	11.93	13.90	14.73	14.51	13.80	12.64	13.73
14/11/2021	11.84	13.67	14.28	13.69	13.44	12.12	13.38
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							
19/12/2021							
26/12/2021							
2/01/2022							

Source: ASMC, WKS Estimates.

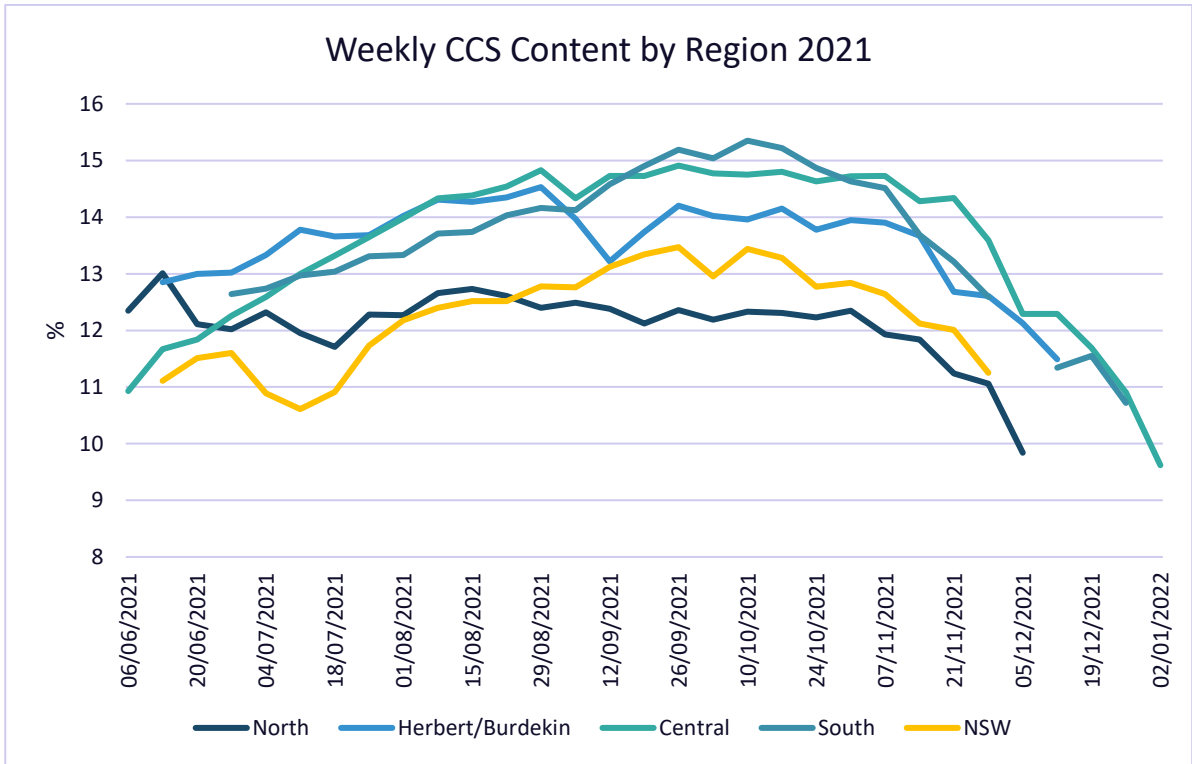
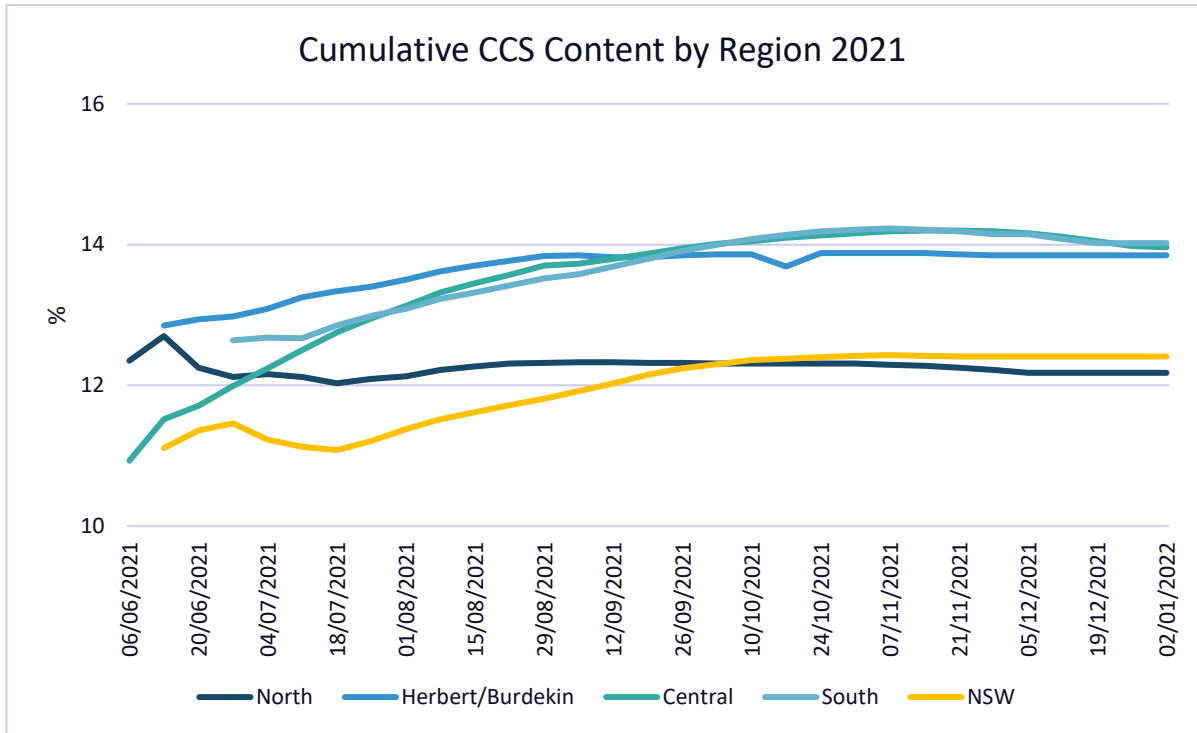


Table 5: Australian Cumulative CCS Content by Region (%)

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	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	12.29	13.88	14.19	14.23	13.64	12.43	13.58
14/11/2021	12,28	13.88	14.20	14.21	13.64	12.42	13.57
21/11/2021							
28/11/2021							
5/12/2021							
12/12/2021							
19/12/2021							
26/12/2021							
2/01/2022							

Source: ASMC, WKS Estimates.





PRESS REPORT

Wilmar's mills crush out for 2021

The last of Wilmar's eight mills has crushed out, bringing the 2021 season to a close. Wilmar's Plane Creek Mill at Sarina processed the last of its cane on Sunday December 12, with the final raw sugar expected to be produced this week. Wilmar Sugar's general manager operations said 14.6 mln tonnes of cane had been processed between the eight factories this season, resulting in the production of about two mln tonnes of raw sugar. The throughput was down on last year's 14.9 mln tonne crop, with seasonal conditions impacting the harvest. Wilmar employees across the Herbert, Burdekin, Proserpine and Plane Creek mills were now preparing for a big maintenance season works program. Wilmar is maintaining a high level of investment in its mills and cane supply network, with more than AUD 187 mln being spent on maintenance and capital replacement projects in 2022. A majority of the focus would be placed on the evaporators, pan vessels and boilers. In the lead-up to the 2022 crush, Wilmar will be installing a new pan vessel at Macknade Mill in Ingham and the first of four evaporators at Kalamia Mill in the Burdekin. The company is also spending AUD4.6 mln on upgrades to the air heater on Proserpine Mill's No.3 boiler, and AUD1.5 mln on Inkerman Mill's boiler station, ahead of a complete replacement of the Inkerman's No.1 boiler furnace in 2023 at a cost of AUD10.3 mln.

[North Queensland Register](#) 15 December

Signatures on FTA herald new sugar opportunity

Sugarcane growers are hopeful 2022 will bring new sugar trade opportunities following the official signing of the Australia-UK Free Trade Agreement (FTA). Once the FTA enters into force it will give up-front tariff-free access for 80,000 tonnes of Australian sugar to be sold to the UK in the first year increasing by 20,000 tonnes each year for the next eight years. CANEGROWERS thanks the Australian government for achieving this result which is a huge boost on the 9,925 tonnes quota we had for the whole of the European Union prior to Brexit. While markets in the Asia-Pacific region will continue to be the main focus of Australia's sugar sales, this Aus-UK FTA will allow for some important diversification for the export-oriented industry which relies on a fair and rules-based world trading system.

[CANEGROWERS](#) 17 December



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