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It’s Sugarcane Annual time again and, as always, I find looking back over the year just gone is interesting. And again, as always, I am reminded that when the Chinese say “may you live in interesting times” they are not wishing you well. The “interesting times” referred to are times of uncertainty, full of not necessarily pleasant surprises. Sounds like farming doesn’t it?

At this time last year growers in NSW were optimistic about the future which says a lot about their resilience because 2012 was a year most of them would like to forget. Some growers harvested only 30 per cent of a normal crop and overall the NSW crop came in at less than a million tonnes – the worst result in 40 years.

On the upside, they were reporting that, although things were dry, most of the plant cane and ratoons were the best they’d seen for many years. Apparently there’s an old saying on the Tweed: “We grow our best crops in the dust.”

Which brings us back to the old Chinese saying about interesting times – Australia day 2013 will be remembered in Northern NSW for all the wrong reasons. For two years in a row on Australia day this region has been inundated with heavy rain – in some areas delivering the biggest floods on record.

Four days after the flood peak cane begins to emerge on the Tweed.

<table>
<thead>
<tr>
<th>Mill area 2012–13</th>
<th>Harvested area (hectares)</th>
<th>Tonnes of cane per hectare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mossman</td>
<td>7,105</td>
<td>71.6</td>
</tr>
<tr>
<td>Tableland</td>
<td>7,203</td>
<td>103.5</td>
</tr>
<tr>
<td>South Johnstone</td>
<td>18,220</td>
<td>70.0</td>
</tr>
<tr>
<td>Tully</td>
<td>23,911</td>
<td>74.2</td>
</tr>
<tr>
<td>Herbert River Mills</td>
<td>50,394</td>
<td>71.9</td>
</tr>
<tr>
<td>Burdekin Mills</td>
<td>71,181</td>
<td>105.1</td>
</tr>
<tr>
<td>Proserpine</td>
<td>20,328</td>
<td>79.2</td>
</tr>
<tr>
<td>Mackay Sugar Mills</td>
<td>69,684</td>
<td>80.6</td>
</tr>
<tr>
<td>Plane Creek</td>
<td>16,165</td>
<td>75.5</td>
</tr>
<tr>
<td>Bundaberg Sugar South</td>
<td>20,440</td>
<td>88.9</td>
</tr>
<tr>
<td>Isis</td>
<td>15,687</td>
<td>96.0</td>
</tr>
<tr>
<td>Maryborough</td>
<td>10,418</td>
<td>63.9</td>
</tr>
<tr>
<td>Rocky Point</td>
<td>3,496</td>
<td>66.4</td>
</tr>
<tr>
<td>Queensland</td>
<td><strong>334,232</strong></td>
<td><strong>84.0</strong></td>
</tr>
<tr>
<td>Condon</td>
<td>4,304</td>
<td>70.0</td>
</tr>
<tr>
<td>Broadwater</td>
<td>4,275</td>
<td>88.3</td>
</tr>
<tr>
<td>Harwood</td>
<td>2,868</td>
<td>82.3</td>
</tr>
<tr>
<td><strong>New South Wales</strong></td>
<td><strong>11,447</strong></td>
<td><strong>79.9</strong></td>
</tr>
<tr>
<td>Total/average</td>
<td>345,679</td>
<td><strong>83.9</strong></td>
</tr>
</tbody>
</table>

Source: BSES Limited
ROW CROP & BROADACRE PRODUCTS

- Fertiliser Rigs
- Gas Rigs
- Cultipackers
- Lilliston Rigs
- Centre Busters
- Side Busters
- Dryland Cotton Rippers
- Vacuum Double Disc Planters
- Dryland Strip Till Machines
- Tyne Planters
- Single Disc Planters
- Double Disc Planters
- Stump Jump Units
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At least the 2012 harvest had been completed in dry conditions. The extremely poor result in New South Wales together with a disappointing crop in the Herbert-Burdekin was offset by better news out of the Northern and Southern regions of Queensland. Australian sugar production had clawed its way back to above four million tonnes – a welcome improvement after two weather-affected, poor production years in 2010 and 2011.

And on another reasonably bright note the 2012 end of season figures suggest that, after 10 years of sharp decline, the area of cane available for harvest appears to have stabilised to a degree. New land is being planted and the demise of the forestry Managed Investment Schemes saw former cane lands returning to sugar production. This is an encouraging sign but cane land continues to be lost to other crops and ever encroaching urban development. The area harvested for crushing in 2012 was just over 345,000 hectares.

Once the damaging floods were out of the way we were back to relatively benign conditions and most areas enjoyed fine weather throughout the crush – except of course in New South Wales where harvesting began in the mud.

Australian sugar production is forecast to be a reasonably respectable 4.25 million tonnes in 2013–14, down slightly from 4.3 million tonnes in 2012–13. The forecast decline reflects flood damage to new plantings in early 2013 and lower average sugar yields, due in part to Yellow Canopy Syndrome (YCS) in the Bundaberg, Isis and Burdekin regions.
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Sugar: A year in review

October 2012

New tyre technology boosts cane farm productivity

Queensland State Government announces the use of high-tech flotation tyres on trucks will allow better haulage of sugar cane. Transport and Main Roads Minister Scott Emerson and Member for Burnett Stephen Bennett announce the government agreed to extra loading for any cane trucks using flotation tyres.

November 2012

40,000 hectare cane farm proposed in North Queensland

A major agricultural project proposed by a private agribusiness to include a 40,000 hectare cane farm, sugar mill, cattle feedlot and abattoir near Georgetown, north-west of Townsville. The Etheridge Shire Council and interested party work together on the proposal.

APVMA severely restricts the use of Diuron

The Australian Pesticides and Veterinary Medicines Authority (APVMA) announces restrictions on the use of herbicide diuron which the sugar industry says will severely impact the industry.

Newman Government working with Canegrowers to protect the Great Barrier Reef

Environment Minister Andrew Powell signs a Best Management Practice (BMP) agreement with the sugarcane industry as part of the Newman Government’s strategy to boost agricultural productivity and help protect the Great Barrier Reef.

December 2012

Mackay Sugar looks to coal-free future

The CEO of Mackay Sugar says potential upgrades to the Farleigh Mill could put the company in line for more government grants if the planned work goes ahead the mill could be coal-free by 2015.

Pioneer pilots new technology

Pioneer Mill lived up to its name in the final weeks of the 2012 crushing season, becoming the first Australian mill to test new mud filter technology.

January 2013

Flooding disaster hits Australia’s east coast

Ex-Tropical Cyclone Oswald and associated monsoon trough passes over parts of Queensland and News South Wales over a number of days, causing widespread impact including severe storms, flooding and tornadoes. Worst affected areas include Bundaberg, Lockyer Valley, Logan and northern New South Wales.

February 2013

Tourism plans for Southern Queensland cane farms

After seeing cane production falling by 47 per cent since 1998, cane farmers on the northern Gold Coast submit plans to the council to transform the region into a tourism hub.

March 2013

Scientists puzzled by yellow cane

ABC reports scientists are struggling to work out what is turning sugar cane yellow in north Queensland, with farmers fearing for the health of their crops.

Yellow Canopy Syndrome hits sugar industry

After several crops of cane in the Mulgrave Mill area showing signs of leaf yellowing, the yellowing returned in the Mulgrave area, with new cases reported in the Herbert and Burdekin regions. The condition is reported as affecting plant cane, replant cane and ratoons in a number of varieties.

April 2013

ACFA holds Soil Health Forum

The Australian Cane Farmers Association (ACFA) hold their inaugural Soil Health Forum. Cane farmers from all over Queensland and New South Wales gathered together in Townsville to discuss soil health issues with special guest speakers

Floods leave ‘huge’ impact on Bundaberg Sugar

ABC reports Bundaberg Sugar says January’s floods caused more than $15 million worth of damage to the business. General Manager of operations, David Pickering, says large sections of railway were washed away and it has had to find alternative transport from the mill.

Mackay Sugar signs up Atherton Tablelands cane

Mackay Sugar and Tableland Canegrowers Limited enter into Cane Supply Agreements with cane growers on the Atherton Tablelands, which will result in approximately 700,000 tonnes of cane being supplied from the Atherton Tablelands to Mackay Sugar’s Mossman Mill from 2014.
New South Wales Sugar Milling Cooperative and Manildra Harwood Sugar become Bonsucro accredited

New South Wales Sugar Milling Cooperative Ltd and Manildra Harwood Sugar announce that they became the first in Australasia to become Bonsucro certified. The certification of the Cooperative’s growers, its sugar milling operations and the Sugar Refinery joint venture with Manildra which operates alongside the Harwood Mill is the first certification from producer to customer in the world.

New research organisation for sugar

Cane growers and sugar millers voted in support of the formation of a new research organisation for the industry to be called Sugar Research Australia (SRA) which would take over the assets of BSES.

May 2013

Pesticides authority open to reviewing diuron ban for Qld cane farmers

The Australian Pesticides and Veterinary Management Authority (APVMA) says it would consider reviewing a ban on the use of the herbicide diuron. APVMA tells a federal budget estimates hearing it is no longer concerned about the herbicide’s impact on the biodiversity of the Great Barrier Reef off Queensland.

Joe Ludwig launches National Food Plan

Federal Agriculture Minister Joe Ludwig unveils a new plan designed to grow the local food industry and put Australia on the world food map. The National Food Plan is said to include a multi-million-dollar research fund to help Australian producers capitalise on the so-called Asian “dining boom”.

Wilmar Sugar Australian Hand Cane Cutting Championships 2013

The Australian Hand Cane Cutting Championships are held in Home Hill. 19 competitors travel from as far as Cairns and Bundaberg to compete. Anselmo Felesina takes out the Wilmar Sugar Australian Hand Cane Cutting Championships Final.

MSF Sugar to sign new Raw Sugar Supply Agreement with QSL

Queensland Sugar Limited (QSL) welcomed the announcement by MSF Sugar that it would sign a new Raw Sugar Supply Agreement (RSSA).

June 2013

Sugar Research and Development Services Bill passed by Senate

The Sugar Research and Development Services Bill 2013 and companion Bills pass by the Senate. The Bills outline the new sugar research and development levy and how these funds will be administered by an Industry Owned Corporation in the future.

Flood-hit port begins exporting sugar backlog

ABC reports the first commercial sugar export leaves Bundaberg, five months after floods extensively damaged the port in the southern Queensland city reported ABC News.

PlantZap: New diet drink revolution

PlantZap, a product created by extracting from cane juice has been developed by a team of Queensland scientists. It is reported that PlantZap reduces the calorie content of certain drink by up to 50 per cent while increasing sugar mill output by up to 2 per cent.

Queensland’s 2040 vision for agriculture

Queensland’s Agriculture, Fisheries and Forestry Minister, John McVeigh, releases strategy to double Queensland’s agricultural production by 2040.

July 2013

Project team plans attack on unknown cane disease

The project team tasked with finding the cause of an unknown cane symptom affecting north Queensland growers meets for the first time.

$60 million relief offered for Qld farmers

Struggling Queensland farmers will be able to restructure their debts under a $60 million federal government emergency relief package. Federal Agriculture Minister Joel Fitzgibbon and his Queensland counterpart John McVeigh sign the agreement in Emerald.

Further rate cuts for farm productivity loans

Agriculture, Fisheries and Forestry Minister John McVeigh announces further interest rate cuts for the Queensland Government’s First Start and Sustainability Loans for farmers. Mr McVeigh says the decrease in interest rates was good news for Queensland farmers wishing to invest further in their businesses.

QSL Raw Sugar Supply Agreements rolled over until 2017

Queensland Sugar Limited (QSL) to announces that all six current milling partners agree to rollover their existing Raw Sugar Supply Agreements (RSSA) with QSL which will see them supply raw sugar until at least the end of the 2016 season (June 30, 2017).

August 2013

Interest grows in Far North Queensland mega farm

The Australian agribusiness behind the proposed ‘mega’ farm, Integrated Food and
Energy Development, attracts interest from potential Chinese, Middle Eastern and US investors. It is reported.

**$100 million boost for agricultural R&D**

Queensland Minister for Agriculture, Fisheries and Forestry John McVeigh has welcomed the Federal Coalition’s commitment to boost funding for Rural Research and Development Corporations by $100 million.

**Key appointments kick-start SRA’s RD&E investment journey**

Sugar Research Australia (SRA) is appointed by the Hon. Joel Fitzgibbon, Minister of Agriculture, Fisheries and Forestry as the industry service body for the Australian sugarcane industry.

**Sugar industry campaign to fight back against bad press**

The sugar cane industry fights back against a barrage of bad press that is ‘demonising’ sugar. The industry announces its well-advanced plans for a ‘nutritional strategy’ of its own to counter the portrayal of sugar as a ‘white demon’ reports ABC Rural.

**World first dietary fibre set for commercial scale production**

The Federal Government has invested $1.8 million through the Commercialisation Australia grant program in KFSU’s ‘Kfibre’, a dietary fibre made from sugarcane which is shown to lower Gl in food and improve bowel and gut health.

**September 2013**

**Coalition wins federal election**

Tony Abbott will be the 28th Prime Minister after the coalition wins the federal election.

**Mackay Sugar loses $3 million compensation appeal**

Mackay Sugar’s chief has expresses disappointment after losing an appeal against a $3 million compensation order made in a raw sugar supply dispute with Sugar Australia.

**Marian cane farmer named 2013 Nuffield Scholar**

Marian cane farmer, Simon Mattsson, is awarded the prestigious Nuffield Scholarship and says he will study soil health, focusing on both the beneficial and predatory microbial activities that are crucial to sustaining productive soils.

**SRDC winds up**

Sugar Research and Development Corporation (SRDC) Executive Director, Annette Sugden, acknowledges the contribution researchers and scientists in Australia have made to the sugar industry and acknowledges the commitment and dedication of staff from SRDC. SRDC closes its doors on September 3.

**Good Fortune for NQBE project**

Construction of a $500 million State Government approved renewable power, sugar and bio products facility in Ingham, North Queensland, is on target for completion in 2016 following a breakthrough agreement with an international partner.

**Barnaby takes ag role**

NEWLY-elected Nationals deputy leader Barnaby Joyce is appointed the federal Agriculture Minister in the Coalition Cabinet.

**Mackay Sugar secures strategic position in Sugar Terminals shares**

Mackay Sugar announced it has entered into an agreement to acquire 2.6 million Sugar Terminals Limited (STL) shares from Bundaberg Sugar at $0.85 per share, with a commitment to acquire the remaining 12.7 million shares in four tranches within the next eight years.

**Cane farmers shortlisted for Australian Farmer of the Year awards**

Two young cane farmers, Gerard Puglisi and Clinton Southern, are named finalists in the Australian Farmer of the Year Awards. Gerard is shortlisted in two categories, Rural Leader and Diversification, while Clinton for Biosecurity (Plant division).

**October 2013**

**Fire destroys huge sugar terminal in Brazil**

International sugar markets react rapidly to one of the world’s largest sugar terminals being destroyed by fire with the raw sugar price jumping 100 points to a 12-month high. The Copersucar terminal in Santos caught light effecting 200,000 tonnes of sugar.

**Bright future for Australian food exports to Asia**

A report issued under the National Food Plan reports there will be significant opportunities for the nation’s food exporters into Asia out to 2050, as long as Australia is strategic about which countries need its products reports ABC Rural.

**Coalition vows FTAs with China, Korea and Japan**

Trade Minister Andrew Robb wants to sign free trade agreements with South Korea, Japan and China by the end of the Abbott government’s first term in a move that promises a major boost for the nation’s farmers and services sector reports The Australian.

**Mackay Sugar awards Mossman Mill transport contract**

Mackay Sugar announced it has awarded the transport contract for sugarcane, sugar and molasses, for its Mossman Mill, to Qube Logistics.
Lower sugar prices

The world indicator price for raw sugar (Intercontinental Exchange, nearby futures, no. 11 contract) is forecast to average US16 cents a pound in 2013–14 (October to September), down from around US18 cents a pound in 2012–13. The forecast lower average price for 2013–14 reflects the expectation that world sugar production will exceed consumption for the fourth consecutive year, lifting world sugar stocks-to-use ratio to a level last reached in 2007–08. The forecast price, if realised, will still be above the average of US14.5 cents a pound (in 2013–14 dollars) over the 10 years to 2011–12.

World sugar production lower

World sugar production is forecast to be 181.1 million tonnes in 2013–14, 1.8 million tonnes less than the record harvest of 2012–13. Forecast higher sugar production in Brazil and Thailand is expected to be more than offset by lower sugar production in Europe, Mexico and the US.

Brazil: Sugar production is forecast to increase to a record 41.5 million tonnes in 2013–14 (October to September), 2.1 per cent more than the harvest of 2012–13. The forecast increase reflects a further rise in the sugar cane area harvested in response to favourable world sugar and ethanol prices and a return to more normal seasonal conditions after excessive rainfall in 2012–13. Sugar cane production in Brazil is forecast to reach a record 652 million tonnes in 2013–14, 11 per cent higher than in 2012–13.

The proportion of sugar cane used to produce ethanol in Brazil is forecast to be 55 per cent in 2013–14, compared with 50 per cent in 2012–13. The forecast higher cane allocation to ethanol production reflects, in part, the effect of an increase in Brazil’s mandatory blending ratio of anhydrous ethanol with gasoline by 5 percentage points to 25 per cent, effective from 1 May 2013. Another factor supporting this forecast is an expected decline in the price ratio of sugar to ethanol. In recent months this ratio in Brazil has declined to levels last seen in late 2008.

China: Sugar production is forecast to be largely unchanged at 14.2 million tonnes in 2013–14. This reflects a 5 per cent increase in average sugar yields, largely offsetting the
adverse effect of an estimated 3.5 per cent fall in cane area harvested. Chinese farmers responded to lower world sugar prices by moving away from sugar cane cultivation to alternative crops.

**Thailand:** Sugar production is forecast to increase by 7 per cent in 2013–14 to 10.7 million tonnes. While cane area harvested is estimated to remain largely unchanged at 1.4 million hectares, sugar yields are assumed to increase by 3 per cent in 2013–14.

**India:** Sugar production is forecast to be 25 million tonnes in 2013–14, down from 26.5 million tonnes in 2012–13. The forecast decline is based on an estimated 3 per cent reduction in cane area harvested, which is partially offset by forecast higher average sugar yields. Cane and sugar yield potentials have been boosted by a favourable 2013 monsoon season, which has so far delivered rainfall around 14 per cent above the long period average.

**United States:** Sugar production is forecast to decline by 3 per cent in 2013–14 to 7.7 million tonnes, mainly due to forecast lower yields and reductions in both sugar cane area harvested and beet plantings. Lower sugar beet plantings were due mainly to unusually wet and cold seasonal conditions at the time of planting.

**Mexico:** Sugar production is forecast to be 6.4 million tonnes in 2013–14, compared with a record 7.4 million tonnes in 2012–13. The forecast decline reflects a reduction in sugar cane area harvested in response to lower returns to cane growers and expected lower yields due to dry weather.

**European Union:** Sugar production is forecast to be 17.2 million tonnes in 2013–14, compared with 17.6 million tonnes in 2012–13. The forecast largely reflects a 3 per cent decline in estimated sugar beet plantings.

**Eastern Europe:** Sugar beet production is forecast to decline by 16 per cent to 7.6 million tonnes in response to lower sugar prices and a return to more normal seasonal conditions after two years of bumper yields.

**Russian Federation:** Sugar production is forecast to decline by 16 per cent to 4.4 million tonnes, while sugar production in the Ukraine is forecast to be 1.9 million tonnes, 22 per cent lower than in 2012–13.

**World sugar consumption higher**

World sugar consumption is forecast to increase by 2.1 per cent in 2013–14 to 176.3 million tonnes. This reflects the combined effects of lower sugar prices and assumed growth in world population and incomes, particularly in China, India and Brazil. The forecast consumption growth, if realised, will be slightly below the average of 2.2 per cent a year over the decade to 2011–12. Growth in world sugar consumption is facing competition from increasing use of high intensity sweeteners (both artificial and natural).

**World sugar trade to grow**

World sugar exports are forecast to be 57.1 million tonnes in 2013–14, 2.5 per cent more than in 2012–13. The forecast increase is driven by larger sugar supplies available for export in
Bundaberg and Isis regions. Yields, due in part to canopy syndrome disease, are forecast to decline by 24 per cent from 4.3 million tonnes in 2012–13. Sugar plantings in early 2013 and lower average sugar prices are forecast to decrease to 3.1 million tonnes in 2013–14, 12 per cent lower than in 2012–13, reflecting a forecast 4 per cent rise in domestic sugar production to 2.9 million tonnes.

Sugar imports into the European Union are forecast to be 4.7 million tonnes in 2013–14, 9 per cent greater than in 2012–13. The forecast increase reflects lower production and higher domestic use.

Sugar imports by the Russian Federation are forecast to increase to 1.6 million tonnes in 2013–14, 0.8 million tonnes higher than in 2012–13 due to lower domestic production.

**Record world sugar stocks**

World closing stocks of sugar are forecast to increase by 4.8 million tonnes in 2013–14 to a record 78.8 million tonnes. The world stocks-to-use ratio is forecast to increase by 4.2 percentage points in 2013–14 to 45 per cent, which is above the average of 40 per cent for the 10 years to 2011–12.

**Australian sugar production slightly lower in 2013–14**

Australian sugar production is forecast to be 4.25 million tonnes in 2013–14, down slightly from 4.3 million tonnes in 2012–13. The forecast decline reflects flood damage to new plantings in early 2013 and lower average sugar yields, due in part to canopy syndrome disease in the Bundaberg and Isis regions.

The average return to Australian cane growers is forecast to decline by 24 per cent in 2013–14 to around $34 a tonne of sugar cane. The forecast decline in returns to growers reflects forecast lower world sugar prices in 2013–14, with its effect only partially offset by an assumed depreciation of the Australian dollar.

The forecast return, if realised, will be the lowest since 2007–08. Queensland Sugar Limited, the marketer of more than 90 per cent of Australia’s raw sugar exports, forecasts its gross harvest pool return in 2013–14 to be $386 a tonne International Polarity Scale, down from $429 in 2012–13.

But Queensland Sugar Limited notes that the final harvest pool return depends on future movements in world sugar prices and the Australian exchange rate. Australian sugar exports are forecast to remain largely unchanged in 2013–14 at 2.9 million tonnes. However, the value of Australian sugar exports is forecast to decline to $1.27 billion in 2013–14, compared with $1.4 billion in 2012–13.

**FIGURE 7: Australian sugar production, export and returns to cane growers**

![Graph showing Australian sugar production, export, and return to cane growers over time.](image)

**TABLE 1: Sugar outlook**

<table>
<thead>
<tr>
<th>2011–12</th>
<th>2012–13s</th>
<th>2013–14f</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>World</strong>&lt;sup&gt;a&lt;/sup&gt;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Mt</td>
<td>174.3</td>
<td>182.9</td>
<td>181.1</td>
</tr>
<tr>
<td>Brazil Mt</td>
<td>36.9</td>
<td>40.6</td>
<td>41.5</td>
</tr>
<tr>
<td>Consumption Mt</td>
<td>168.0</td>
<td>172.7</td>
<td>176.3</td>
</tr>
<tr>
<td>Exports Mt</td>
<td>54.3</td>
<td>55.7</td>
<td>57.1</td>
</tr>
<tr>
<td>Closing stocks Mt</td>
<td>63.8</td>
<td>74.0</td>
<td>78.8</td>
</tr>
<tr>
<td>Change in stocks Mt</td>
<td>5.4</td>
<td>10.2</td>
<td>4.8</td>
</tr>
<tr>
<td>Stocks-to-use ratio %</td>
<td>38</td>
<td>43</td>
<td>45</td>
</tr>
<tr>
<td>Price US cents/lb</td>
<td>22.7</td>
<td>18.0</td>
<td>16.0</td>
</tr>
<tr>
<td><strong>Australia</strong>&lt;sup&gt;b&lt;/sup&gt;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Area ‘000 ha</td>
<td>370</td>
<td>380</td>
<td>388</td>
</tr>
<tr>
<td>Production&lt;sup&gt;c&lt;/sup&gt; Kt</td>
<td>3683</td>
<td>4300</td>
<td>4250</td>
</tr>
<tr>
<td>Exports Kt</td>
<td>2572</td>
<td>2996</td>
<td>2999</td>
</tr>
<tr>
<td>−value A$m</td>
<td>1556</td>
<td>1403</td>
<td>1267</td>
</tr>
</tbody>
</table>

<sup>a</sup> October–September years. <sup>b</sup> July–June years. <sup>c</sup> Raw tonnes actual. <sup>f</sup> ABARES estimate. <sup>f</sup> ABARES forecast.

Sources: ABARES; Australian Bureau of Statistics; International Sugar Organization.
Alternative sweeteners are mainly high fructose corn syrup, a derivative of corn, and the so-called high intensity sweeteners. High fructose corn syrup is particularly suited to use in soft drinks. Until recently, the high intensity sweeteners have mainly been artificially synthesised compounds, such as aspartame, cyclamate, neotame and sucralose. In recent years some more natural high intensity sweeteners derived from plants have emerged in the marketplace, mainly from the stevia and monk fruit (luo han guo) plants.

Polyols are sweeteners with reduced calorific value that are derived from corn and sugar. Unlike high intensity sweeteners, polyols (such as sorbitol, mannitol, lactitol, maltitol, isomalt and xylitol) can also be used as bulking agents and to improve the texture of foods and beverages.

While sugar consumption has grown steadily over the past 20 years, alternative sweeteners have made substantial inroads into sugar’s share of the world sweeteners market. A key driver of this is that alternative sweeteners deliver equivalent sweetness at lower cost than sugar. Another driver for high intensity sweeteners is that they are low in calorific value (sometimes almost zero), unlike sugar and high fructose corn syrup, and therefore useful in weight control diets.

The market share of high fructose corn syrup peaked at 8.2 per cent around 2000, but had declined to 6.8 per cent by 2012. The US is the main producer of high fructose corn syrup, accounting for nearly 80 per cent of world exports in the three years to 2012.

US prices for high fructose corn syrup generally reflected movements in US corn prices until 2009–10, but since then have declined, in contrast to rising US corn prices. US production of high fructose corn syrup was 8.29 million tonnes in 2011–12, down marginally from the record 8.6 million tonnes in 2000–01.

The estimated share of the high intensity sweeteners (artificial and natural) in the total sweeteners market (in sugar equivalent terms) has increased from 6.8 per cent in 1985 to 9.6 per cent in 2011. The stevia share was around 0.4 per cent in 2011 but has grown in response to regulatory approval in an increasing number of countries. Stevia is the common name for a native South American plant. The steviol glycosides responsible for sweetness are mainly contained in the leaves and have almost zero calorific value. Stevia is mainly grown in China, but Argentina, Paraguay, Thailand, Kenya and the US are also producers.

Stevia is typically used in food and beverages to reduce sugar content, rather than completely replace sugar, because sugar is needed to mask the bitter aftertaste of stevia sweeteners.

Stevia-based sweeteners were first commercialised in Japan in 1971 but faced regulatory hurdles in other countries. They have been approved as a dietary supplement in the US for many years but approval for use in all foods did not occur until 2008. Other countries with unrestricted approval are Australia, China, the Republic of Korea, Taiwan, Indonesia, Thailand, Paraguay, Brazil, Argentina, Israel, the Russian Federation as well as the European Union (from December 2011). Approval for use of sweeteners derived from monk fruit in food and beverages in the US occurred in early 2010.

Stevia, or ‘sweet-leaf’ amongst other names, is native to subtropical and tropical regions from western North America to South America.

Monk Fruit or ‘luo han guo’ is an herbaceous perennial vine of the gourd family, native to southern China and northern Thailand.
Across the regions the better harvest and land preparation conditions in 2013 have helped growers put the trials of 2012 behind them. New growers are entering the industry and former cane land lost to other industries is being returned to cane. This all bodes well for a good crop and tonnage recovery over the next few years.
Northern Region

Drawn from reports by Gerard Puglisi, ACF Northern Region Director

The 2012 crush finished in late October/early November. With the early finish most farmers completed their fertiliser programs and spraying programs in good time. The Diuron restrictions which came into effect late November 2012, will be yet another hurdle that the sugar industry must overcome.

As we moved forward into the new year, we all hoped that we had put the past few season’s misfortune behind us. In Mossman the future was looking a little brighter – we now had greater security, with our Mill under the ownership of Mackay Sugar and I am confident that our production will now increase back to the levels of years gone by.

But it was to be a shaky star for many growers – through to late December, conditions were dry, dry, dry! The lack of spring/summer storms saw cane suffering and some isolated areas showing signs of die-off.

The good news was the continuing return of former MIS forestry land to cane. Significant areas are being prepared for autumn planting.

Good growing conditions

For most of January the northern region had ideal weather, with good growing conditions. We were receiving most of our rain at night with hot and humid days. A lot of this was a result of ex-cyclone Oswald – farmers in the north escaped most of the damage inflicted on our southern neighbours.

The Cyclone season did not draw to an end until May when we saw a last minute effort from Cyclone Zane which crossed over the tip of Cape York. The northern cane farming regions were relatively untouched.

The coastal soils were quite waterlogged with a fair amount of lodging present. There was some stool tipping, even without the presence of grubs or cane-yellowing. The mills were looking to an early to mid-June start on the coast.

October/November

The 2013 crush is well advanced for another year in the Mossman region and at this stage the crush is due to finish in the first half of November. The Mossman region is still cutting above estimate, but weeks eight and nine did see a slight reduction to the estimate. The mill also had some major breakdowns at the start of week 10, which left over 10 hours of cane waiting to be processed.

To the end of week eleven, 307,302 tonnes had passed through the rollers with an average CCS for the Mossman Mill area averaging 12.26 for the year.

Most of the 2013 planting is now completed in the region and some farmers are shifting focus to start their fertiliser and spraying routines. The main varieties that have been planted are Q208, Q183, Q241, Q250 and Q238. The weather has been favourable for our plant cane and ratoon crops for the 2014 season, but a heavy rain event in late August did cause some damage to some planted blocks on the North side of Mossman.

Unscheduled mill stops

The Mulgrave and South Johnstone Mills have finally had some decent weather, which has helped with the harvest and also helped farmers carry out their farming activities.

Mulgrave growers have has a frustrating run with unscheduled mill stops caused by industrial action and mill breakdowns. The good news so far for these two regions is that to date the estimates seems to be holding.

To the end of week 13, the Tableland Mill has crushed 360,310 tonnes with an average CCS of 13.88 and a crop average of around 115 tonnes per hectare. The current estimate for the Tableland area is around 850,000 tonnes and if the mill can’t increase their weekly crush rate before the wet season arrives, there is a strong chance that some of the 2013 crop may have to be stood over.

Biosecurity inspections

Over the past few months there has been ongoing discussions between industry and Biosecurity Queensland regarding the arrangements for sugarcane plant material (stalks and leaves) or machinery that has been in contact with a sugarcane plant, or soil on which a sugarcane plant is or has been growing; being inspected if moving between pest quarantine areas. This type of material must have an Inspector’s approval to move between pest quarantine areas.

Mossman Agricultural Services will be providing this inspection service for the Mossman region. So if you have to move a machine between pest quarantine areas you should contact Mossman Agricultural Services and please give them as much notice as possible.

| NORTHERN REGION 2012 HARVEST SUMMARY |
|-----------------|----------|------------|
| Mill area       | Tonnes   | Tonnes per |
|                 |          | hectare    |
| Tableland       | 745,000  | 103.5      |
| Mossman         | 509,000  | 71.6       |
| Mulgrave        | 1,010,000| —          |
| South Johnstone | 1,276,000| 70.0       |
| Tully           | 1,774,000| 74.2       |
| Northern Region |           |            |
| production:     | 5,314,000|            |

Tableland 745,000 103.5
Mossman 509,000 71.6
Mulgrave 1,010,000 — 12.93
South Johnstone 1,276,000 70.0
Tully 1,774,000 74.2
Northern Region production: 5,314,000 tonnes
The easiest profit-boosting tool you’ll never lay your hands on.

Get more out of your equipment with less effort – AutoTrac™ hands-free guidance.

It redefines efficiency – plug it in, turn it on, and let go. Reduce your harvesting efforts when you use it on your sugarcane harvester for less stress and fatigue. For sprayer applications, it can help reduce your chemical costs too. Integrated AutoTrac automated guidance delivers consistent savings and precision, regardless of crop conditions and operator skill level. Better still, John Deere track sugarcane harvesters come AutoTrac-Ready. Simply install a StarFire™ 3000 receiver and GreenStar™ display, then purchase an AutoTrac activation, and you’re on your way. Smarter performance, increased efficiency and a fast payback are waiting for you at your John Deere Dealer today.

Nothing Runs Like A Deere™.
Herbert

Drawn from reports by Carol Mackee, ACF Herbert Region Director

The 2012 crush finished in November and through most of December we experienced extreme hot weather conditions. Fire breakouts saw farmers fighting fires in different areas and if there hadn’t been a large area under plant cane, the outcome would have been disastrous.

The cane was in desperate need of rain and down it came on December 24 and 25. The whole district went from brown, dead grass to a lush green and the cane began powering ahead.

Oswald arrives

In late January 2013 Cyclone Oswald dumped around 26 inches of rain which caused flooding in the Herbert region. Major flooding occurred in the Halifax area with some flooding in the town area.

Once the cyclone passed we were hit with gusting westerly winds with temperatures just under 43 degrees at Abergowrie and the humidity in full swing at 9.00am in the mornings. There was no other way to describe it other than ‘cruel’. Even walking down the main street of Ingham I saw people diving into air conditioned shops, just to stay cool.

Smut washed away

Before the rains, smut was quite prominent in some paddocks, but the rain seemed to have helped alleviate this problem to some degree. Smut was minimal on a district basis, showing up in old ratoons, mainly in varieties Q204 and Q208. Any early impact on productivity appeared to be negligible.

Crop-wise there was some good cane out there and also some rubbish as well. We were looking for lots of sunshine to dry out paddocks.

July/August saw patchy rain, with some areas missing out and others having a deluge dumped on their farms. Harvester operators had started their 50 per cent round and planting was powering ahead although some of the ground was still too wet. At the same time the Stone River and the Bambaroo areas were experiencing extremely dry conditions. Farmers have a tough job when it comes to finding ideal weather.

October/November

Extremely dry conditions are being experienced over the whole district at present. The southern side of Ingham has not seen rain since April. Some of the plant cane is now showing signs of stress.

With crushing powering ahead it looks like all of the Herbert crop will be harvested by the end of October.

Feral pigs are everywhere and the brolgas have landed in paddocks and seem to be searching for grubs among the trash; they are turning the trash over the same as feral pigs.

The last of the MIS trees have disappeared into windrows of timber which have been steadily burnt. When planting gets underway next year all the land in the Abergowrie region will be back under cane.

Our General Manager, Stephen Ryan, Chairman Don Murday, Burdekin Director Margaret Menzel, and I attended discussions with Wilmar representatives over their proposal for sugar/cane pricing. Due to consensus among farmers, the Wilmar proposal has been abandoned at this stage. Discussion of various marketing alternatives is continuing, in good faith.

Women in sugar

I also attended a meeting held by Women in Sugar where we were given a presentation on handling our medicines, researching the ingredients and the reactions one could have; and letting doctors know exactly what we take, including alternative medicines. This certainly gave everyone an insight into what can go wrong. If the opportunity arises we should all attend meetings such as this one.

Bio-Energy project approved

Construction of a $500 million State Government approved renewable power, sugar and bio products facility in Ingham, North Queensland, is on target for completion in 2016 following a breakthrough agreement with an international partner announced today.

In a joint statement, North Queensland Bio-Energy Corporation Limited (NQBE) and China’s Nanning Good Fortune Heavy Industry Co. Ltd (GFHI) said the two companies had signed a Memorandum of Understanding in relation to the provision of equity and supply of plant and equipment for the ground-breaking project.

The facility, which will be the first of its kind in Australia, will be the most technically advanced sugar processing facility of its type in the world.
T-Tape’s history runs deep

First installed in a Bundaberg block of cane in the early 1980s, this revolutionary product put water right where the crop needed it, and profits right the farmer wanted it.

T-Tape was the first tape installed in sugarcane in Australia, and remains the only drip tape manufactured right here in Queensland.

Being a product of innovation, T-Tape was also the first to manufacture 29 and 35 mm diameter drip tape. This larger diameter gives you the ability to run each tape for a longer distance, which increases your block size and decreases your costs. And you know what that means: More profits in your pocket.

Making crops grow. And your profits, too.

Call us for a quote on John Deere Water T-Tape:

1800 558 009
Burdekin

Drawn from reports by Margaret Menzel, ACFA Burdekin Director

THE Burdekin 2012 harvest came to an end in early December – the final total of under 7,500,000 tonnes of cane was a disappointing result from a difficult season all round.

The good news going forward was that there was to be 1000 hectares of additional area under cane in the Burdekin district in 2013. It was also good to hear that Invicta mill had showed its best mill reliability since 2004.

We were very pleased with the popularity of the Australian Cane Farmers Burdekin Facebook page – over harvest it had grown quickly to nearly 800 members. Coverage included farmers, harvesting crews and milling representatives across the state, as well as prominent state and federal politicians interested in the industry.

The weather early in the season was generally drier than usual with only scattered rain and thunderstorms across the district. The humidity made for unpleasant days for us, but the crop enjoyed the growing conditions.

Reduced estimates – crop yellowing

By April/May crop estimates were being drastically reduced for the 2013 season, due to a succession of late finishes and poor seasons, as well as the severe impact of the yellow leaf problem in the district.

Most areas of the district were affected. Previous strong root growth was affected and the root ball around the cane stalks had been compromised – farmers were able to lift the stub out of the ground by hand.

In August/September harvest was going well and most of the district’s planting was well in hand. Weather conditions had been favourable for the harvest and this ensured the 2014 crops got off to an early start.

October/November

Total crushing figures through our district mills over the past week was 393,141 tonnes and with the season now approaching the final weeks of harvest, credit is due to all who are working to achieve the best result in all areas of production, harvest, transport and milling. The season estimate stands between 7.28 to 7.3 million tonnes and falling. We anticipate end dates for all Burdekin mills will be before the end of October.

Thai and Japanese visitors

During last month, a group of millers and farm managers from Thailand (sponsored by KSL), were hosted by Warren Martin, Tate and Lyle, in various areas of the industry, including the Burdekin district. The group enjoyed the local hospitality as well as being shown through many aspects of the farming and harvesting practices in the Burdekin district. Included in their experiences were the precision farming, planting and harvesting techniques employed by Davco Farming, as well as more typically sized farming enterprises in the district. The group compared a range of farming, irrigation and management practices as well as enjoying the spectacle of a Burdekin cane fire.

Subsequently, a group from Japan has also visited the Burdekin with Carla Keith from QSL hosting the visitors and following a similar format.

KFSU Federal grant

KFSU Cane Fibre products has recently received a Federal Government grant for $1.8 Million to help fund development of a new mill to produce sugar cane fibre in the Burdekin. I recently co-hosted a presentation for local growers and community members, including QSL representatives, to tour the factory and see the results of some of the research trials, etc. KFSU are in the process of welcoming local investors to participate in their present share offering, closing soon.

Harvesting contractors and farmers have worked well with Wilmar staff and grower representatives in the 2013 season, to ensure that all crews using sidings have completed current workplace safety inductions.

A Yellow Canopy Syndrome (YCS) update was held in Brandon and growers and industry participants are advised that all information will continue to be updated on the sugar research website at: www.sugarresearch.com.au . For any concerns or for additional advice, growers should contact their local productivity board.

BPS: 07 4783 1101.

The district’s late planting is completed and weather conditions have been favourable as harvest is being completed. Despite another seriously reduced district crop, the early finish should assist the 2014 crops get off to a good start.

General Manager, Stephen Ryan and Chairman, Don Murday attended discussions with Herbert director and myself and Wilmar representatives over their proposal for cane pricing, which has been abandoned at this stage. A regional meeting was held in Ayr on that night, with concerns raised about grower’s economic interest and security of sugar payments as well as the outrageous charges on water, electricity and rates.

Unfair rate burden

Local producers have been hit with an additional eight per cent on their rate bills over the past two years alone so questions have been raised with the relevant state minister. There is a blatant anomaly in the system. The district’s cane producers are responsible for under 25 per cent of the rateable land area in the Burdekin, yet are...
forced to pay over 50 per cent of the shire rates. It is clear that the council has a great deal of explaining to do and the minister is on notice to address the issue, as a matter of urgency.

Workcover premiums doubled

I have also raised questions about increased Workcover premiums imposed by the state government, with the rates being approximately doubled for the equivalent wages outlay since the election of the Newman LNP government.

With the federal election just past, congratulations are due to the incoming government members, including re-elected member for Dawson, George Christensen. At recent meetings with the Member for Dawson, local issues in the industry have been discussed and suggestions offered to rebuild rural policies that better represent the industry and the farming families that underpin its survival. It is disconcerting to reflect on how little (if any) effort has been expended by the major parties, in formulating any detailed primary industry policies or direction, or in addressing the very real concerns faced by this and other primary industries in this nation, in the lead up to the election.

Grower’s share of corrupted world price?

The local industry has been hammered by increases in rates, government charges on every level, irrigation water charges and escalating fuel and electricity prices, wages and other input costs, as well as losses from weather events, YCS, etc. yet we are still forced to accept a corrupted world sugar price for our product, with no cost of living or local cost impacts factored in.

In contrast with every other competitor nation, including the developing world, our farmers receive only a percentage of the corrupted world sugar price for their product... with no consideration for the whole product or the by-products produced, e.g., ethanol (fuel and pharmaceutical), co-generation and bio-dunder and the potential for all manner of other goods. Industry representation needs to speak up to all levels of government with one voice on this issue, or growers will never receive their entitlements or due consideration for their considerable investments and inputs.

Commercially sound rural policies need to be adopted by government, or the triple bottom line may as well be written off for rural Australians, who have endured the cost of a nation’s excesses for far too long.

<table>
<thead>
<tr>
<th>Mill area</th>
<th>Tonnes</th>
<th>Tonnes per hectare</th>
<th>Average CCS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burdekin Mills</td>
<td>7,479,000</td>
<td>105.1</td>
<td>14.30</td>
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</tbody>
</table>

**Central Region**

**CRUSHING finished on December 12, 2012 with the region processing a bit over 5.6 million tons of cane with a PRS of 14.6.** The weather held up enabling good harvesting conditions. But the hot dry weather had impeded the progress of the crop for 2013.

It was pleasing to learn that in the 2013 season there was to be an increased area of 1005 hectares for harvest. There was concern in some sectors that the mill reliability and capacity would become an issue on the back of this expansion.

Mackay Sugar’s Cogeneration Plant commenced exporting green power in mid-November.

The weather finally broke with falls of over 100 mm the weekend before Christmas. There were similar falls again just before the New Year. This enabled the crop to get away and growers to get their spray programs underway. The control of weeds was not as good as it used to be. It will take time to manage the use of the limited range of available herbicides.

Towards the end of January we received falls of over 300 mm courtesy of ex-Cyclone Oswald. The weather depression, which brought this rain, ended up causing a great amount of grief to Eastern Australia before it was all over.

By April/May the estimates for the Mackay crop were coming in at 10 to 15 per cent under last year’s crop. The unseasonable conditions of last year and the late finish had impacted on growing conditions for this crop.

**Harvest begins**

Mackay mills started harvesting in mid-June with the crop size at that stage estimated at a disappointing 5 million tonnes. It was hoped that the crop would grow out some more with favourable weather conditions.

By August over 20 per cent of the estimated 5 million tonne crop had been processed in Mackay and 25 per cent of the estimated 574,000 tonne crop crushed in Mossman. Factories had encountered above budget stoppages in the first month of crushing but were now on target.

Planting was underway with particular interest in the new varieties available Q242, Q249 and Q240. A major concern was pachymetra root rot. Varieties with resistance needed to be selected when replanting into fields with high spore counts so as not to impede productivity.
**Red Witchweed**

Biosecurity Queensland placed movement restrictions on properties in the Mackay area that reported red witchweed – a parasitic plant that can attach itself to the roots of sugarcane, robbing it of water and nutrients.

**October/November**

Mackay Sugar is up to four million tonnes of cane crushed. Harvesting conditions have been ideal with no wet weather affecting the operations. Mackay Sugar’s Chairman commented that the throughput will be about five million tonnes of cane for this year, but with the current high PRs the sugar make will be significantly higher than last year. The harvest should be completed by November 19.

The district is desperately in need of rain and the chances are below average of receiving it. There have been no general falls of rain since June. Plant cane and ratoons are suffering and need moisture now. The longer this dry period lasts the greater the impact on the crop for next year.

Simon Mattsson has become a winner of a Nuffield Scholarship which is supported by SRA. The Marian canefarmer has also grown soybeans and chickpeas for the last 15 years on his farm. His study of soil health will focus on both the beneficial and predatory microbial activities that are crucial to sustaining productive soils.

Sugar Australia’s claim against Mackay Sugar was for $3.15 million (excluding legal costs and interest awarded by the court) for the additional costs which Sugar Australia incurred in sourcing alternative raw sugar as a result of the non-supply by Mackay Sugar.

The matter has been long running and was previously the subject of two arbitration decisions and a Supreme Court appeal prior to the matter coming before Justice Jackson.

The outcome of the decision by Justice Jackson delivered on Thursday September 5, 2013 is that Mackay Sugar was successful in its application for leave to appeal but was not successful as to the merits of the claim, with judgement being awarded in favour of Sugar Australia.

Mackay Sugar was inducted to Queensland Business Leaders Hall of Fame for its contribution to the state’s reputation and economy despite its 150-year long battle to survive in the highly volatile sugar market. Through innovation and co-operation, our growers have been able to thrive despite volatile weather and global competition.

### CENTRAL REGION 2012 HARVEST SUMMARY

<table>
<thead>
<tr>
<th>Mill area</th>
<th>Tonnes</th>
<th>Tonnes per hectare</th>
<th>Average CCS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proserpine</td>
<td>1,611,000</td>
<td>79.2</td>
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</tr>
<tr>
<td>Mackay Sugar Mills</td>
<td>5,617,000</td>
<td>80.6</td>
<td>14.48</td>
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<tr>
<td>Plane Creek</td>
<td>1,220,222</td>
<td>75.5</td>
<td></td>
</tr>
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**Central Region production:** 8,448,000 tonnes

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**Southern Region**

- Drawn from reports by Michael Hetherington, ACFA Southern Region Director

The end of the 2012 harvest saw ISIS Central Mill set a new crush tonnage record of 1,560,000 tonnes. This took some doing but all was well in the end. Wet weather did not interfere. The CCS levels were very good in the ISIS area as well. Many of us had not had such a good overall result since before 2010.

Bundaberg farmers finished harvesting quietly and in a much better mood than the past couple of seasons, and Maryborough growers, for once, had a dry finish.

The dry spell caused an enormous upsurge in the irrigation effort. Irrigating farmers were finishing late each evening because of the electricity tariff structure and windy conditions.

Soybean and peanuts went in again, with much emphasis on rotation. Soybean planting in ISIS areas was later than usual, due to the prolonged harvest which kept the blocks chosen for plough-out under cane until mid-December. Also the need to irrigate paddocks pre-plant slows down planting.

**Record floods**

The dry ended with a vengeance in late January when Cyclone Oswald paid the east coast a visit. The Burnett River peaked at the

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*It’s taken twenty years to get brave enough to give a ‘different’ planting system a go. Now we are bedding up, placing the sett just about on the surface and throwing soil on top.*
highest level on record; around 9 metres above the usual in the Bundaberg town reach.

For many canefarmers, the rain came none-too-soon for high-ground crops but was devastating for many low-lying crops.

By April/May the Southern Region was in the doldrums with regard to sugar cane growth due to extensive continuing cloud cover.

Soybean cropping in with sugar cane had been a mixed bag this year. Uneven maturity was a challenge at harvest. At least we had a crop, not many bugs and very little irrigation needed.

By mid-year local management of irrigation systems was struggling to capture the attention of growers – I believe it would have to be one of the most under exposed but vitally important issues in the state of Queensland.

We don’t know what, in plain English, it costs to run our systems. Well not from anything that was heard at the Queensland Competition Authority enquiry into price paths for the water. And apparently Sunwater figures are too complicated for us ordinary folks.

Harvest

Dry weather; passable CCS; warm weather giving fast ratoons; no industrial strife at Mills; and no workplace accidents – it all seemed pretty good. Perhaps with the Australia day floods, our region had had a whole year’s drama in one weekend. It was apparent that the crush was going to be shorter than hoped, that is, not much was making estimate and some growers were at 50 per cent by the first week of August.

Hidden harvest hazards

The hazardous nature of cutting in blocks that had been submerged by 80 km per hour floodwaters became all to obvious. LP gas bottles were a worry and there were thousands of them. Power lines by the mile that were stripped from poles were another booby trap. Anyone whose harvester has swallowed an old irrigator will know the terrible smell of burning trash inside a machine when, in frustration, the oxy torch is used to cut away cable wrapped oh so tightly around the rollers.

October/November

ISIS mill crushed over the 1,000,000 tonne mark recently with sugar content higher than we are used to, due to dry weather. The adverse effect of this is that the ratoon crop is struggling to come along. Irrigation is a must even before anything is seen of the new shoots. Irrigation systems, both on farm and SunWater, are being run up to max already.

More flood damage revealed

The full effect of the Australia Day flooding is becoming known as underground infrastructure and a lot of electrical components are failing from unseen damage caused by the ex-tropical cyclone Oswald. Surface water shutdowns are frequent and electricians are everywhere. Ants and corrosion are often the cause of failure.

Bundaberg farmers are crowing about the sugar levels they have seen and with good reason; CCS in the 18’s is certainly welcome. The Bundaberg crush is due to finish by the end of October.

Maryborough has had a similar clear weather spell and at last the farmers there have been able to simply get on with the harvest. The southern MSF suppliers are also ramping up. It seems the alternative sugarcane processing venture has closed its doors; a great pity.

One challenge we have to face is workforce retention. With eight months until next harvest, I wonder what will become of our good people. We are looking at a huge crop for 2014 and will have to be prepared.

Different planting method

On the home front we have bravely bitten the bullet so to speak and adopted a ‘different’ planting method. The construction of a single row bed former is half the story. The alteration of the ‘Moller’ type planter is the other half. We cannot separate the two now.

From Northern New South Wales ideas, I have lifted the billet placing from about 150 mm below normal soil surface level to about 25 mm below normal surface level. The bed former used to give the planter some ‘dirt’ to work in. Doesn’t seem like much, but maybe, just maybe, it will solve one of our farms most difficult problems.

With 90 per cent of our farm being white wallum soil we have a real problem with losing plant crop to wet weather; this year is an exception. 300 mm of top soil then a layer of clay is what we have to work with. Any wet weather results in water-logging up to about 150 mm below soil surface. We are having a go at keeping the setts above this, but obviously still needing 100 or so millimeters of cover. Now we are bedding up and with a ground level mouldboard, placing the sett just about on the surface and throwing soil on top (see picture).

Well, we have a strike with what we have done so far. It is a big change from the Childers red soil deep furrows. It’s taken twenty years to get brave enough to give it a go.

| SOUTHERN REGION 2012 HARVEST SUMMARY |
| Mountain area | Tonnes | Tonnes per hectare | Average CCS |
| Bundaberg | 1,817,000 | 88.9 |  |
| Sugar South | 1,505,000 | 96.0 | 14.58 |
| Isis | 665,000 | 63.9 |  |
| Maryborough | 232,000 | 66.4 |  |
| Southern Region production: 4,219,000 tonnes |  |  |  |
2012 was another year most of us would like to forget. Some growers harvested only 30 per cent of a normal crop. On the upside, while there were a few ends and ridges in fields that did not come up, due to dry conditions, most of the plant cane and ratoons were the best for many years. There is an old saying on the Tweed: “we grow our best crops in the dust.” Little did we know that Cyclone Oswald was heading our way!

No celebrations with record floods

Australia day will be remembered in Southern QLD and Northern NSW for all the wrong reasons. For two years in a row on Australia day we have had heavy flood rain – in some areas giving us the biggest floods on record.

The storm front stalled over the north western part of the Tweed catchment delivering between 1100 and 1500 mm of rain in four days, before moving on to the upper catchment of the Richmond and the Clarence. The upstream cane growing areas of the Richmond and Clarence sustained substantial damage.

The flooding will have put our full recovery back one more year.

There were a few odd patches of soy beans on the Tweed that were harvestable. On the Richmond, some of the up-river and lower lying areas were lost and on the Clarence, all beans were lost.

By June we were able to look back and find a few positives that came out of the floods.

There were a few varieties that survived the flooding much better than any others. Q208 was the standout variety along with Q183. Q240 in the month after the flood looked for all intents lost but four months on it appeared that its recovery may be as good as any other variety and while it is only just starting to make cane, it looked like every stool survived and will make a two year old of sorts. The other variety to show flood resistance was Q232.

Horror harvest start

All of the NSW mills had another horror harvest start weather-wise, giving both farmers and the mills major problems. For the mills it was mud in the cane making it very difficult to process and for the farmers it was the damage to fields.

We are implementing an education process to show farmers the costs to them of having mud/ash in the cane they deliver.

Some figures done by the co-op suggest that if we can reduce our mud/ash levels there is at least another $1 million dollars to be made by the industry.

October/November

The harvest started like last year: very wet then about mid July it turned dry. We have had six weeks without rain, which was causing some concern for the early plant cane.

In late September, we had a very welcome 40–50 mm. This has made for perfect planting conditions at least for the next month or so.

Once again there is a very big planting regime in all NSW mills areas as we rebuild our industry, following the three years of floods.

The production at all mills is up on last year by about 40 per cent in total.

We have finishing dates at mills from November 10 to 24, so all will finish early and this should give the ratoons a good early start for next year.

Bonsucro

NSW Sugar continues to be the only industry outside Brazil to be certified to the Bonsucro Production standard, and with two members of the NSW industry sitting on the board of Bonsucro, we have quite a lot of influence.

NSW has the unique position to be the only farmer-mill-refinery supply chain in the world certified from the fields to the customers.

Harvest losses disturbing

The three rivers had visits from SRAs Cam Whiting to conduct trials on cane and sugar losses during harvest in early September. The results were (to say the least) both revealing and quite disturbing.

In green cane with the extractors running at 1150 rpm there was a measured loss of sugar per ha of $485, with about 12.7 per cent of the crop being thrown on the ground and lost.

The Tweed trial was done in a crop of plant Q208 around 75 tph with the harvester traveling at 6.5 kph.

Since I first heard Cam present the findings of his research on harvester losses, I have been amazed at how long it has taken the industry to react to his work. In simple terms, to extrapolate the finding to a 100 hectare farm, the losses could be as much $50,000 per year.

**NSW 2012 HARVEST SUMMARY**

<table>
<thead>
<tr>
<th>Mill area</th>
<th>Tonnes</th>
<th>Tonnes per hectare</th>
<th>Average CCS</th>
</tr>
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<tbody>
<tr>
<td>Condon</td>
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<td>70.0</td>
<td></td>
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<tr>
<td>Broadwater</td>
<td>378,000</td>
<td>88.3</td>
<td>12.06</td>
</tr>
<tr>
<td>Harwood</td>
<td>236,000</td>
<td>82.3</td>
<td></td>
</tr>
</tbody>
</table>

**NSW production: 915,000 tonnes**
A NEW research study into sweet sorghum has shown the huge potential of the crop as a single source of energy, food and animal feed. Sweet sorghum is receiving significant global interest because of its potential as a multi-product crop, but there has been minimal research under Australian growing conditions or using Australian processing facilities, until now.

Sweet sorghum is a fast growing plant that produces a stalk up to five metres tall with a high concentration of fermentable sugars at a level similar to that of sugarcane, and produces a large panicle of edible, nutritional grain similar to that of grain sorghum. Unlike many other crops used for renewable energy production, sweet sorghum can simultaneously produce food and feed co-products.

The research, funded by Rural Industries Research and Development Corporation (RIRDC) and industry partner AgriFuels Ltd and conducted by Queensland University of Technology led by researcher, Associate Prof Ian O’Hara looked at sweet sorghum’s agronomy, its ability to be processed using existing processing infrastructure, its carbon footprint, using it to produce biofuels, and its use in food products for humans, fish and livestock.

Cropping area

Sweet sorghum has a wide potential cropping area, including tropical and sub-tropical Queensland, the Northern Territory, Western Australia and in temperate regions of New South Wales, Victoria and Western Australia.

The research showed that several varieties of sweet sorghum grew very quickly in field trials, reaching maturity in only 16–20 weeks with fermentable sugar concentrations similar to those of sugarcane under optimal conditions.

Co-location of sweet sorghum and sugarcane for bio-ethanol

There are significant short term opportunities for the co-location of sweet sorghum and sugarcane production to increase feedstock availability for bio-ethanol production. In fact, we found that adding sweet sorghum juice to sugarcane juice resulted in higher ethanol yields than fermenting sugarcane juice alone.

Associate Prof O’Hara and his research team also produced a range of sweet sorghum food and feed products including sweet sorghum flour, syrup, sweet sorghum-based breakfast cereal, fish and animal feed pellets and human dietary fibre products.

They also conducted a life cycle assessment and it determined that the aggregated effects of all sweet sorghum biorefinery products resulted in a strong net reduction in Global Warming Potential. Australia is well placed to establish integrated biorefineries producing sweet sorghum-based products for domestic use and for export into the Asian market.

Further research and commercialisation activities will be required to help develop sweet sorghum potential for commercial cultivation and processing at a large scale in Australia.

For more information: RIRDC Publication No. 13/087 Sweet sorghum: Opportunities for a new renewable fuel and food industry in Australia.
Will they, won’t they – will sugar return to the Ord?

In May of this year the Western Australian State Government announced that it had finalised a deal with Kimberley Agricultural Investments (KAI) to invest $700 million in 13,400 hectares of irrigated farmland and infrastructure.

KAI’s original investment plans lodged with the WA Government in 2012 were based on bringing sugar back to the Ord. The company announced it would re-establish a sugar industry in the Ord with a sugar mill and associated co-generation power plant creating more than 400 jobs.

Although the original Ord sugar industry saw some good yields over 10 years it folded in 2007. Plans to expand the irrigation scheme had stalled, world sugar prices had fallen and growers moved into other crops. The Ord Sugar Mill closed and farmers had to form their own company to process the final crop.

The Department of Agriculture and Food WA continues to work on overcoming some of the problems that have plagued the region. They have carried out extensive research into strains of sugarcane suitable for the Ord and resistant to sugarcane smut.

So is sugar on the way back – well perhaps. The deal announced in May gives KAI the flexibility not to build a sugar mill but it must make a minimum investment in some form of processing. The State Government set KAI strict investment deadlines under the deal for it to lease the land on the Ord and turn it into farms. It must have crops planted on all of the land by October 2016 and any 25-year extension of the leases is conditional on KAI delivering a “sugar mill or equivalent capital expenditure on other processing infrastructure”.

Sugar or sorghum or both?

KAI executives said it might not be in the company’s or the Ord’s best interests to focus on sugar while ignoring other options and the need for diversity.

Chief executive Jian Zhong Yin said sugar was still part of its long-term plans but the sugar mill might start as an ethanol plant using sorghum, with later development tied to viability and the availability of land, particularly in the Northern Territory.

Mr Yin said that there was a big market in China for sorghum, a high yielding crop which resisted harsh conditions (see Sweet Sorghum story, page 26).

It seems that the land that KAI has leased and will develop for irrigation cannot provide the necessary scale of production required for a viable sugar industry.

To achieve critical mass with a sorghum project KAI is considering offering leases to established Ord farmers to also grow sorghum crops.

KAI has also shown interest in the Northern Territory’s Stage 3 irrigated scheme just across the border. If it goes ahead, it will provide an immediate 15,000 hectares for development.

The company says it plans to spend $700 million in the region if it’s to grow a sugar industry. This would include $450 million for a sugar mill, $200 million for farm infrastructure and $50 million for Wyndham Port improvements.
First step to reduce plant need for nitrogen fertiliser uncovered

Nitrogen fertiliser costs US farmers approximately $8 billion each year, and excess fertiliser can find its way into rivers and streams, damaging the delicate water systems. Now, a discovery by a team of University of Missouri researchers could be the first step toward helping crops use less nitrogen, benefitting both farmers’ bottom lines and the environment.

Crops confused

Gary Stacey, an investigator in the MU Bond Life Sciences Center and professor of plant sciences in the College of Agriculture, Food and Natural Resources, found that crops, such as corn, are 'confused' when confronted with an invasive, but beneficial, bacteria known as rhizobia bacteria. When the bacteria interact correctly with a crop, the bacteria receive some food from the plant and, simultaneously, produce nitrogen that most plants need. In his study, Stacey found that many other crops recognise the bacteria, but do not attempt to interact closely with them.

“The problem is that corn, tomatoes and other crops have a different response and don’t support an intimate interaction with the rhizobia, thus making farmers apply larger amounts of nitrogen than might otherwise be necessary,” Stacey said.

“Scientists have known about this beneficial relationship since 1888, but it only exists in legume crops, like soybeans and alfalfa. We’re working to transfer this trait to other plants like corn, wheat or rice, which we believe is possible since these other plants recognise the bacteria. It’s a good first step.”

Nodules not created

When legumes like soybeans sense a signal from the bacteria, they create nodules where the bacteria gather and produce atmospheric nitrogen that the plants can then use to stimulate their growth. This reaction doesn’t happen in other plants.

“There’s this back and forth battle between a plant and a pathogen,” said Yan Liang, a co-author of the study and post-doctoral fellow at MU. “Rhizobia eventually developed a chemical to inhibit the defense response in legumes and make those plants recognise it as a friend. Meanwhile, corn, tomatoes and other crops are still trying to defend themselves against this bacteria.”

In the study, Stacey and Liang treated corn, soybeans, tomatoes and other plants to see how they responded when exposed to the chemical signal from the rhizobia bacteria. They found that the plants did receive the signal and, like legumes, inhibited the normal plant immune system. But corn and these other plants don’t complete the extra step of forming nodules to allow the bacteria to thrive.

“The important finding was that these other plants didn’t just ignore the rhizobia bacteria,” Stacey said. “They recognised it, but just activated a different mechanism. Our next step is to determine how we can make the plants understand that this is a beneficial relationship and get them to activate a different mechanism that will produce the nodules that attract the bacteria instead of trying to fight them.”

More information: www.decodingscience.missouri.edu/2013/09/the-secret-of-the-legume

Journal reference: Science; Sep 27, 2013
INTRODUCING AN ALTERNATIVE CROP INSURANCE OPTION

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07 4927 7411

BUNDABERG
Michael Brown
07 4153 6011

GOLD COAST
Ross Inglis
07 5553 8914
IN 2010 an international team led by scientists at The Sainsbury Laboratory (TSL) in Norwich, UK, transferred broad spectrum resistance against some important plant diseases across different plant families. This breakthrough provided a new way to produce crops with sustainable resistance to economically important diseases.

Food insecurity is driving the search for ways to increase the amount of food we grow, whilst at the same time reducing unsustainable agricultural inputs.

One way to do this is to increase the innate ability of crops to fight off disease-causing pathogens. Increased disease resistance would reduce yield losses as well as reduce the need for pesticide spraying.

Breeding programs for resistance generally rely on single resistance genes that recognise molecules specific to particular strain of pathogens. Hence this kind of resistance rarely confers broad-spectrum resistance and is often rapidly overcome by the pathogen evolving to avoid recognition by the plant.

**Another defence system**

But plants have another defence system, based on pattern recognition receptors (PRRs). PRRs recognise molecules that are essential for pathogen survival. These molecules are less likely to mutate without harming the pathogen’s survival, making resistance to them more durable in the field. These essential molecules are common to many different microbes, meaning that if a plant recognises and can defend itself against one of these molecular patterns, it is likely to be resistant against a broad range of other pathogens.

Very few of these PRRs have been identified. Dr Cyril Zipfel and his group at TSL took a Brassica-specific PRR that recognises bacteria, and transformed it into the Solanaceae plants Nicotiana benthaminiana and tomato.

“We hypothesised that adding new recognition receptors to the host arsenal could lead to enhanced resistance,” said Cyril.

Under controlled laboratory conditions, they tested these transformed plants against a variety of different plant pathogens, and found drastically enhanced resistance against many different bacteria, including some of great importance to modern agriculture such as Rastonia solanaceraum, the causal agent of bacterial wilt and a select agent in the United States under the Agricultural Bioterrorism Protection Act of 2002.

**From a different plant family**

“The strength of this resistance is because it has come from a different plant family, which the pathogen has not had any chance to adapt to. Through genetic modification, we can now transfer this resistance across plant species boundaries in a way traditional breeding cannot,” said Cyril.

Published in the journal Nature Biotechnology, the finding, that plant recognition receptors can be successfully transferred from one plant family to another provided a new biotechnological solution to engineering disease resistance.

The Zipfel group began extending this work to other crops including potato, apple, cassava and banana that all suffer from important bacterial diseases, particularly in the developing world.

**New breakthrough – understanding natural plant immunity**

Now the UK researchers at TSL, in a close collaboration with Chinese scientists at Tsinghua University and the Chinese Academy of Sciences have, for the first time, uncovered exactly how an immune receptor mediating plants’ natural immunity to bacteria works.

The researchers have shared their findings in a paper published recently in Science. TSL senior scientist Prof. Cyril Zipfel said: “Plants, like humans, have an innate ability to recognise potentially-harmful bacteria and launch an immune response. What we have found is how that complex chemical relationship works.”

“This information opens up avenues which will have benefits for crop production worldwide, as it gives us the knowledge to engineer precise resistance in crops.”

More information: “Structural Basis for flg22-Induced Activation of the Arabidopsis FLS2-BAK1 Immune Complex” Science, 2013.
ABOVE: Although not without disappointment in a number of regions, the 2012 harvest saw cane production begin what we all hope is a sustained recovery from the trials of 2010 and 2011.

BELOW: Australian sugar production in 2012 jumped by nearly 20 per cent on the past two seasons to make a welcome return to above the four million tonne mark.
ABOVE: Leaving out the disastrously wet 2010 crush which saw millions of tonnes of cane left unharvested in the fields, the previous rapid decline in sugarcane area seems to have been arrested and is now holding at around 360,000 hectares. There is an ongoing campaign by various mills to bring more country into play.

BELOW: Leaving the havoc of unusually wet harvests and particularly damaging cyclones behind – and not to forget severe flooding in southern areas early in 2012 – yields in most regions saw a return to nearer the norm of the last decade.
ABOVE: World sugar production rose to record heights in 2012–13 and sugar consumption continued its increase of around two per cent per annum. Forecasts for 2013–14 are for production to retreat slightly but for the rate of rise in consumption to be largely maintained.

BELOW: 2012–13 saw Brazilian sugar production recover from the effect of a poor season and tired ratoons in 2011–12 to climb to over the 38.6 million tonnes – their best result in the past decade.
The international scene

Major importers: Our proximity to Asia and our reputation as a reliable, high quality supplier helps to ensure countries like Korea, Indonesia and Malaysia remain our major customers.

World Sugar Price: The world sugar price has retreated further from the dizzy heights of 2010–11 back to around US18 cents/lb in 2011–12 and is forecast to fall further to average around US16 cents/lb in the coming season as production exceeds consumption for the fourth consecutive year. This is still comfortably above the average of US13.4 cents/lb over the last decade.
ABOVE: In terms of exports by major sugar producers, 2012–13 saw Australia again ranked third behind Brazil and Thailand.

BELOW: The growing middle class across Asia, our near neighbour and major customer, continues to drive a steady increase in world sugar consumption.
The Australian Cane Farmers Association

ORGANISATIONAL STRUCTURE

Australian Cane Farmers Association Ltd
Level 3, 447, Upper Edward St
Spring Hill, Brisbane 4000
Postal address:
GPO Box 608, Brisbane QLD 4001
Phone: 07 3303 2020; 07 3839 1900
Freecall: 1800 500 025
Fax: 07 3303 2024; 07 3839 1911
Email: info@acfa.com.au
Website: www.acfa.com.au

Herbert Region
Director, Carol McKee
Carol and husband Lex farm in the Ingham district of north Qld. Carol is a graduate of the Australian Institute of Company Directors and holds an advanced diploma in Agri Business Management. She has completed a Woman in Business leadership course and a Rural Leadership Course. Carol and Lex have a keen interest in sustainable sugar production and they also grow a range of bamboo varieties for different end-uses.
Phone: 07 4777 4957

Burdekin Region
Director & Deputy Chairman (Junior), Margaret Menzel
Margaret was born in Gordonvale, Far North Queensland and has a family history of cane farming. Margaret and husband Max settled first in Babinda and then on their cane and banana farm at Miriwinni until, in 1995, they moved to farm in Ayr. Margaret has had extensive involvement with issues associated with the deregulation of the sugar industry. She has completed industry and business based courses to keep abreast of industry requirements and manage the farming enterprise. Margaret was elected to the ACFA board in 2007 and elected Junior Vice Chair in 2009.
Phone: 07 4783 4776

Northern Region
Director & Chairman Don Murday
Don is a fourth generation cane farmer who began farming in 1981. Don’s farm supplies around 12,500 tonnes of cane each year to the Mossman Central Mill. Don is a director of the Mossman Central Mill and has completed a leadership diploma with the Australian Institute of Company Directors.
Phone: 07 4098 1635

Director, Gerard Puglisi
Gerard is a member of the Mossman Industry Management Committee and the Douglas Advisory Board. He also works off-farm as a Technical Field Officer for Mossman Agriculture Services (MAS). He completed an apprenticeship as a Boilermaker at the Mossman Central Sugar Mill and was a Field Officer at the Mulgrave Central Sugar Mill. Gerard is married to Terese and they have two children. Gerard is the founding Chairman of the Mossman Next Generation Group which concentrates on positives issues such as encouraging farmers to plant more cane, aiming to improve current farming practices and encouraging farmers to put proper succession plans in place.
Mob: 0428 988 136
Central Region
Director,
Steve Fordyce
Steve is a fourth generation cane farmer supplying Mackay Sugar’s Marian mill. Steve trained as a fitter and turner at Marian mill before returning to the family farm. He has worked in the mines and worked in the USA in a future farmers exchange program. Steve has since completed a degree in Agronomy and has recently taken on a couple of extra farms.
Phone: 07 4954 3650

Southern Region
Director,
Michael Hetherington
Michael and Kerry farm in the Farnsfield area near Childers. They bought the family farm in 1992, subsequently purchasing another couple of blocks and are currently expanding their sugar enterprise on leased land, supplying ISIS Central Mill. Michael began contract harvesting in 2000 and has been the ACFA Southern Qld director since 2006.
Phone: 07 4126 9118

Southern Region
Director & Deputy Chairman (Senior),
Robert Quirk
Robert serves on the board of Australian Cane Farmers representing NSW, he also serves on the Board of The Better Sugar Cane Initiative. He has been growing sugar cane now for over 50 years, and is president of the local canegrowers organization. He has been involved in sugar and soil research for the last 15 years and has presented this research to many international forums.
Mob: 0413 677 727
Chairman’s report

By Don Murday – ACFA Chairman

The past year has been marked by another wave of era defining change – this time in R&D.

On September 20, 2012, the Australian Sugar Industry Alliance (ASA) lodged a full application to Senator Joe Ludwig, Minister for Agriculture, Fisheries and Forestry in Canberra to establish an Industry Owned Company, ‘Sugar Research Australia’ (SRA), with a new statutory levy of 70 cents per tonne of cane (35c/t to be paid each by the grower and the miller in place of BSES fees and the SRDC levy).

In February 2013, Senator Joe Ludwig affirmed in-principle support for SRA, with certain caveats relating to the proposed constitution, affecting governance and administrative arrangements.

Once the members of BSES voted, in April 2013, to transfer the assets and liabilities of BSES to SRA, the result was inevitable. Amid the turmoil of leadership change in Canberra, the necessary bills passed in June, during the final sitting before the Winter recess and the Federal election.

The new SRA has worked hard to gain the backing of all stakeholders and this will prove a vital step if SRA is to meet the task at hand. The load of one on one extension services has continued to rest with the local cane productivity services. Their interaction with SRA will be pivotal to informed R&D.

In January, ex-Tropical Cyclone Oswald and an associated monsoon trough passed over parts of Queensland and New South Wales over a number of days, causing widespread impact including severe storms, flooding and tornadoes. The worst affected areas include Bundaberg, Lockyer Valley, Logan and northern New South Wales. This event caused considerable damage to crops and erosion, with some paddocks in the Bundaberg region rendered irreparable. Once more, the Bundaberg port has required significant dredging.

YCS

Yellow Canopy Syndrome (YCS) continues to affect crops and baffle researchers. SRA reports that existing field trials have been extended, and new field trials and laboratory tests introduced to continue the search for the cause of YCS.

The trials and tests, conducted within the ‘Solving the Yellow Canopy Syndrome’ research project funded by Sugar Research Australia and the Department of Agriculture, Fisheries and Forestry Queensland (DAFFQ), are building upon the knowledge gained about the condition over the last few months.

Dietary fibre from sugarcane

In August, the Federal Government announced an investment of $1.8 million through the Commercialisation Australia grant program in KFSU’s ‘Kfibre’, a dietary fibre made from sugarcane which is shown to lower GI in food and improve bowel and gut health.

APVMA and Diuron

On the environmental front, the APVMA decision on Diuron in November 2012 caused much frustration. It created a ban in the wet tropics and an effective ban in all other areas via a no-spray window. The window forces farmers to apply diuron to plant cane, early, before the soil profile has consolidated. It is vital to create an effective ban during the establishment of the plant crop so that subsequent trash blank can take over the suppression of weeds.

Surprisingly in May 2013, the ABC reported that, ‘The APVMA has told a federal budget estimates hearing it is no longer concerned about the herbicide’s impact on the biodiversity of the Great Barrier Reef off Queensland.’ While this was welcome news, it cast serious doubt over the original decision and illustrates the need for regulators to be properly informed before making decisions that impact farmers.

Sugarcane BMP and Bonsucro

In November 2012, the Newman Government funded a Best Management Practice (BMP) agreement with the sugarcane industry as part of the strategy to boost agricultural productivity and help protect the Great Barrier Reef. The ACFA supports this initiative and urged Government and the industry to ensure that the Qld BMP program is compatible with Bonsucro, the global standard of which ACFA is a member.

In April 2013, New South Wales Sugar Milling Cooperative Ltd and Manildra Harwood Sugar became the first in Australasia to become Bonsucro certified. The certification of the Cooperative’s growers, its sugar milling operations and the Sugar Refinery joint venture with Manildra which operates alongside the Harwood Mill is the first certification from producer to customer in the world.

ACFA is proud of Directors Robert Quirk and Gerard Puglisi who are active in the Bonsucro administration. Robert is a founding Director and Gerard is the global cane farmer...
recognising that the health of our soils is our main asset. On May 15th April ACFA hosted the inaugural Soil Health Forum.

Cane farmers from all over Queensland and New South Wales gathered together in Townsville to listen and discuss soil health issues with guest speakers. Overall, the ACFA Soil Health Forum was a successful, informative day with researchers and farmers alike leaving with the most up to date, cutting edge information in sugarcane soil health.

**Soil health**

The ACFA has a major focus on soil health, recognising that the health of our soils is our main asset. On May 15th April ACFA hosted the inaugural Soil Health Forum.

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**Sugar marketing**

Global investment in sugar milling assets continued to change the way the industry functions. Wilmar International obtained the ability to market its own ‘economic interest’ export sugar. This was perceived by some farmers and millers as the beginning of the slippery slope of the erosion of value for farmers; while others saw it leading to the eventual loss of QSL.

The ACFA supports QSL as the most efficient operator and natural choice for Qld farmers and millers to market our sugar; obtain the most consistent premiums; provide pricing products for farmers; fund the advances program and manage shipping and our bulk-terminal asserts.

The four pillars of QSL, namely Pool Pricing and Risk Management; Storage, Handling, Quality and Logistics; Financing; and Sales and Trading represent value for farmers, who are the recipients of the greater part of the share of QSL’s effort.

In May, QSL welcomed the announcement by MSF Sugar that it would sign a new Raw Sugar Supply Agreement (RSSA) and so returning to QSL. In July, QSL announced that all six current milling partners had agreed to rollover their existing Raw Sugar Supply Agreements (RSSA) with QSL, which will see them supply raw sugar until at least the end of the 2016 season (June 30, 2017).

In June 2013, Queensland’s Agriculture, Fisheries and Forestry Minister, John McVeigh, released a strategy to double Queensland’s agricultural production by 2040, while in August, Minister McVeigh welcomed the Federal Coalition’s commitment to boost funding for Rural Research and Development Corporations by $100 million.

**Next Gen program**

The Next Gen program continues to grow with a number of regional activities which brought our younger farmers together. The pinnacle of the year was the inaugural ‘Case IH Step UP! Conference’ on the Gold Coast.

The young farmer Next Gen groups got to network and encounter new information, before going back to their home areas recharged and inspired to step-up and take the reins in their local industry.

The future of our industry is in the hands of young farmers and they need the support and knowledge of their more experienced counterparts to push the industry forward.

The Next Generation program (Next Gen) has been developed in response to a major issue the sugar cane industry is facing regarding its main asset – its farmers.

“I’m especially proud of this project and the associated publication, Next Gen Farmer which is printed in Australian Sugarcane.

I look forward to much further growth of the Next Gen program in general and the personal growth of the participants.

I wish you all a successful completion to the 2013 season.
Milling in the Australian sugar industry

In Australia there are approximately 4400 cane farming entities growing sugar cane on around 380,000 hectares annually, supplying 24 mills, owned by seven separate milling companies. The vast majority of cane farms are owned by sole proprietors or family partnerships. The mill ownership structures are a combination of publicly owned entities, privately held companies limited by guarantee, and co-operatives.

Major products

The industry’s major product is raw crystal sugar, which is sold to refineries both domestically and abroad. Approximately 95 per cent of Australian sugar produced comes from Queensland with the balance from Northern New South Wales.

The Australian sugarcane industry is one of Australia’s largest and most important rural industries with sugarcane being Queensland’s largest agricultural crop. The industry directly employs about 16,000 people across the growing, harvesting, milling and transport sectors.

Up to 35 million tonnes of sugarcane is grown on about 380,000 hectares annually. This sugarcane crop can produce up to 4.5 million tonnes of raw sugar, 1.0 million tonnes of molasses and 10 million tonnes of bagasse annually. Approximately 85 per cent of the raw sugar produced in Queensland is exported, generating up to $2.0 billion in export earnings for Queensland. Production from the New South Wales sugar industry is refined and sold into the domestic market.

Green energy

Sugar mills are self-sufficient in energy, burning the sugar processing by-product bagasse, (which is a renewable fuel) to generate electricity and steam for factory operations. In addition, more than half of the electricity generated (400 GWh in 2012) is exported to the electricity network supporting electricity infrastructure and reducing greenhouse gas emissions from power generation. The use of renewable bagasse for the production of ‘green’ energy reduces the nation’s greenhouse gas emissions by over 1.5 million tonnes annually.

The Australian Sugar Milling Council

The Australian Sugar Milling Council is a voluntary organisation, established in 1987 to represent Australian raw sugar mill owners. The Milling Council works with its members, other industry organisations and government to develop and promote policies that enhance the commercial development of the sugar industry in Australia.
ASMC members

Bundaberg Sugar Ltd
Chairman: Colin Stitt
Chief Executive Officer and ASMC Director: Ray Hatt
Mills: Millaquin, Bingera

Bundaberg Sugar, whose origins date back to 1880, has restructured significantly during the past 12 months, firstly by entering into a Joint venture with Maryborough Sugar Factory Limited (MSF Ltd.) that involved its Northern milling assets namely, Tableland, Babinda and South Johnstone Mills. These assets have now been sold to MSF Ltd.

The company remains the largest sugarcane grower in Australia and is part of the Belgian family-owned Finasucro Group. From the 2011 season it has continued to operate its two Bundaberg factories and the associated Millaquin refinery. Bundaberg Sugar Ltd also owns Bundaberg Walkers Engineering Ltd.

Isis Central Sugar Mill Company Limited
Chairman: Peter Russo
Chief Executive Officer and ASMC Director: John Gorringe

Isis Central Mill, located in Childers, has been crushing cane since 1896/1897. This grower-owned mill is the major contributor to the district’s economy. It was the first mill to produce Queensland High Pol brand Sugar. The company operates a cane farming business on owned and leased land that produces in excess of 170,000 tonnes per annum.

Mackay Sugar Limited
Chairman: Andrew Cappello
Chief Executive Officer: Quinton Hildebrand
ASMC Directors: Quinton Hildebrand, Andrew Cappello, Bill Phillips-Turner
Mills: Farleigh, Marian, Racecourse and Mossman

Mackay Sugar was formed as a co-operative in 1988 when five formerly independent milling co-operatives in the Pioneer Valley merged and acquired Pleystowe Mill from the former CSR Limited. The need to be flexible and to maximise value-adding opportunities led shareholders to vote in favour of incorporating Mackay Sugar Limited to a restricted public company in July 2008.

Mackay Sugar is among Australia’s largest sugarcane producing and sugar manufacturing companies. It is also a 25 per cent owner in the sugar refining joint venture Sugar Australia Pty Ltd as well as the New Zealand Sugar Company Ltd with its partner Wilmar Sugar Australia. Combined, it is one of the largest refining operations in the Southern Hemisphere. In early June 2012, Mackay Sugar successfully acquired the raw sugar milling assets of Mossman Central Mill Co. Ltd.

In September 2012, Mackay Sugar commenced the commissioning phase of its 38MW Racecourse Cogeneration Plant, with green energy exported to the electricity grid from mid-November 2012. The plant became fully operational in March 2013.

MSF Sugar Limited
Chairman: Isara Vongkusolkit
Chief Executive Officer and ASMC Director: Mike Barry
Mills: Mulgrave, South Johnstone, Tableland, Maryborough

MSF Sugar Limited is now a fully owned subsidiary of Mitr Phol Sugar Corp. Ltd (Mitr Phol) of Thailand following a takeover completed in April 2012. Mitr Phol is one of the largest global producers in the sugar industry. In addition to its operations in Australia it also has major investments in both Thailand and China.

MSF Sugar having started as a single milling operation based in Maryborough in 1886, now has additional milling operations in Gordonvale, South Johnstone and the Atherton Tableland.

This provides a total milling capacity of approximately 4.7 million tonnes of cane per annum and its operations include transport infrastructure and farming properties to support these mills. All raw sugar produced in its four mills is exported into overseas markets. In addition it has invested in Sugar Terminals Limited, the owner of six Bulk Sugar Terminals located in Queensland.

Tully Sugar Limited
Chairman and ASMC Director: Dick Camilleri
Chief Executive Officer: Alick Osborne

Built in 1925, Tully Sugar Mill has a long history of investment and expansion to the point where it now has the capacity to crush up to 725 tonnes of cane per hour; service a cane supply area in excess of 27,000 hectares; and supply 10MW of renewable energy into the State electricity grid during the crushing season.

In 2011 Tully Sugar Limited was wholly acquired by Chinese-owned agribusiness COFCO Corporation.

The company also owns and operates five sugarcane farms in the area with a combined productive capacity of between 80,000 and 90,000 tonnes depending on seasonal conditions.

Wilmar Sugar Australia Limited (previously Sucrogen)

Executive General Manager – North Queensland: John Pratt
General Manager Operations: Mike McLeod
ASMC Directors: John Pratt, Russell Abotomy
Mills: Macknade, Victoria, Invicta, Pioneer, Kalamia, Inkerman, Proserpine, Plane Creek

Wilmar Sugar Australia Limited owns and operates eight raw sugar mills in Queensland and operates ethanol distilleries at Sarina and at Yarraville, Melbourne.
In a joint venture with Mackay Sugar Limited, it operates sugar refineries in Mackay and Yarraville.

Through the New Zealand Sugar Company Limited, also a joint venture with Mackay Sugar Limited, it operates a sugar refinery in Auckland, New Zealand.

Wilmar Sugar administers Australian Molasses Trading Pty Ltd. Other sugar-related activities include marketing ethanol, solvents and specialty chemicals; owning and operating sugarcane farms; and operating large-scale electricity cogeneration plants at Victoria, Invicta and Pioneer mills.

**ASMC chairman’s comments**

2012 was marked as a year for consolidation, if not outright recovery, for the Australian sugar industry’s fortunes. And once again, the industry was true to its nature, with a degree more variability in production than expected.

From Proserpine north, the harvested crop was somewhere between 5 and 10 per cent down on pre-season forecasts. Mackay was up slightly on estimate, and an excellent crop in the Bundaberg region saw Isis Mill deliver a record crush total. But Maryborough’s crop was down and New South Wales was again impacted by rain and floods. The overall yield for the year was 30.4 million tonnes.

**Achievements**

During 2012 and into 2013, the Milling Council has worked with members on several key areas including:

- Research, Development and Extension (RD&E) reform and the formation of Sugar Research Australia (SRA);
- Carbon policy and ensuring milling companies have access to government funding under the Clean Energy Technology Program;
- Natural resource management initiatives such as Canegrowers’ Best Management Practices Program and examining the opportunities with the recent changes to the Vegetation Management Act in Queensland;
- Enhanced industry safety performance; and,
- Communication of nutritional information about sugar and correcting the misinformation often propagated by the media.

**RD&E reform and the formation of Sugar Research Australia**

While I am confident this will be the last year we discuss the reform of RD&E as an industry, we still should not lose sight of the reform program’s significant achievements - these will fundamentally alter the investment, organisation and delivery of sugar research in Australia. From here on, ASMC will settle into the role of helping identify priorities, contribute to the development of the RD&E Strategic Plan and National Strategy, and hear from Sugar Research Australia on the results of RD&E investment.

**Joint advocacy delivering results**

The past couple of years have seen unprecedented cooperation in our industry across the growing and milling sectors in terms of working together in the government policy arena. I believe this concerted approach has been the key to achieving the goal of a single levy shared equally between millers and growers to fund Sugar Research Australia. Indeed the industry sent a powerful message of its strength and cohesiveness as demonstrated by the results of the 2012 Sugar Poll.

**Resilience**

The relatively recent past has seen movements in the political arena, with a change in government in Queensland after essentially 20 years and the bedding down of a relatively new government in New South Wales. At the federal level, there is ongoing change with the Federal Election results from September 2013 which is likely to bring some significant policy changes.

With the 2013 crush well progressed, the total crop estimate has been relatively constant, with some flood damage in areas, and a still unknown impact of ‘yellow canopy syndrome’ through the Herbert and Burdekin areas, as well as some upside in areas to the north. The floods in Southern Queensland and Northern New South Wales have put paid to any hopes of better than average crops in those areas.

As we deal with the 2013 season and begin preparations for better outcomes next year, the well-regarded resilience of Australian sugar industry stakeholders will once again need to be relied upon. Thankfully, we are a strong and collaborative community, with many years of longevity behind us.

I would like to thank our members for their ongoing support and our CEO and staff for their tireless efforts to promote the interests of the industry.

*Drawn from the Chairman’s Comments by Quinton Hildebrand contained in the ASMC Annual Review 2012–13*
We remain focused on creating value for our members. One of the most important aspects of this is the “net” performance of the raw sugar pools.

In 2012–13 the net pool returns were down on the previous year: $431.15 per tonne IPS (total QSL managed ICE 11 pools average) versus the record return of $519.25 per tonne IPS (total QSL managed ICE 11 pools average) in 2011–12.

The drop in returns reflects the fall in international sugar markets and the ICE 11 contract. The out-performance of the Passive Management Benchmark is largely due to the QSL pricing team forming the view that the market would continue to decline through the season so we priced as much as possible as early as possible. While disappointing the result was ahead of our Passive Management benchmark of $411.59 dollars per tonne IPS.

Other important contributions to net returns included:
- The premium on physical sales, which is a reflection of our reputation for quality and on-time and in-full delivery and long-standing customer relationships;
- Efficient terminal operation without compromising the safety of our employees; and,
- Overall sound cost management.

In this year’s QSL Annual Report we included a more comprehensive analysis of QSL’s performance over the past 12 months and included historic data so that our members can put the year just gone into context and appreciate our underlying performance trends.

So while we are pleased with QSLs 2012–13 performance in a declining market, it was a year with significant distractions.

Our diverse membership base has some distinct interests:
- Wilmar, our largest milling member wants access to physical Australian sugar to complement its trading activity in what is becoming one the largest international sugar players and proposed a Grower Choice model.
- Growers, our members with the most capital invested in the industry want greater control over how their sugar is marketed so they can ensure industry value (the size of the pie) is not diminished and that their share of the value (share of the pie) is protected.
- Our other milling members have different wants, but common to all of them is access to the economies of scale that pooling Australia’s raw sugar provides in logistics, quality management, funding and managing price risk.

While the RSSA provides some certainty for the next three years, the sense that some members are reluctant parties to this arrangement undermines confidence in QSL’s longer term future. For QSL it is important that we find a more stable arrangement. The current uncertainty is a significant distraction from the things we should be focusing on, making it challenging to retain and attract good people and leading to short-term thinking around developing our systems and capabilities in general.

Our assessment of the latest version of the Wilmar proposal was with some modification it could work and preserve most of the value that QSL provides the industry. A version of the Wilmar proposal would keep Australia’s sugar together so that QSL could continue offering:
- The ICE 11 price risk management pools;
- The advances program; and,
- Logistics and quality management all – exactly as we do today.

The only point of contention is whether multiple sellers of Australian sugar competing with QSL will result in a lower physical sales premium and whether the premium they have offered offsets this adequately and equitably for all other participants in the industry.

We have empathy with growers’ concerns that before the ink is dry on Option B there is another proposal and the uncertainty that this creates about where this seemingly ongoing change will end.
The Green Pool Report, like the PSP Report, has a number of points we could all debate. But they are largely points to which there is no definitive answer, so this wouldn’t be helpful. When we first saw the report’s key recommendation we thought it was rather radical, but the industry is unique.

The essence of the report’s recommendations is seeking to put growers in a position where they can control who markets their interest; their share of raw sugar and ultimately the headline figure in their own profit and loss. We don’t see this concept as being mutually exclusive to Wilmar and MSF’s desire to compete with QSL in offering growers a physical marketing choice. We’d like to think there is a win-win outcome. So we encourage our members to keep talking and explore how your different interests can be accommodated.

There is a lot at stake here. Let us keep a focus on our common objectives as we do have a lot of common ground:

- Three of QSL’s activities are not in contention so we should endeavour not to jeopardise the value this creates for the industry; and,
- We should endeavour to find an outcome that is more stable and that engenders confidence across the supply chain.

It is only with confidence that there will be more investment in the industry, and only with investment will we see increased production, productivity and international competitiveness. These are the things that matter.

We are clearly of the view that the worst outcome for the industry would be the total collapse of our current collaborative arrangements. The Board of QSL strongly encourages the industry to find an arrangement that optimises long-term value in an equitable form for all of our members, and bring these negotiations to a landing. Ultimately QSL’s future is in our members’ hands.

**Drawn from the report by QSL Chairman Mike Carroll.**

**ABOUT QSL**

A leader in raw sugar marketing, QSL (Queensland Sugar Limited) has built an excellent reputation for quality, service and innovation in the global sugar market. QSL is responsible for the majority of Australian raw sugar exports and works on behalf of Australian sugar millers and growers to build sustainable business partnerships with sugar refiners in the Asia-Pacific region. QSL serves the interests of growers and miller for the long-term prosperity of the Queensland sugar industry.

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Email: vaus@valmont.com
Milling

Australian Sugar Milling Council

HEAD OFFICE
IBM Building
Level 3/348 Edward Street,
Brisbane QLD 4000

POSTAL ADDRESS
GPO Box 945, Brisbane QLD 4001
Ph: 07 3231 5000 Fax: 07 3229 2113
Website: www.asmc.com.au

Refining

Sugar Australia

HEAD OFFICE
PO Box 80, Yarraville, VIC 3013
Ph: 03 9283 4558

Wilmar Sugar Australia (previously Sucrogen)

HEAD OFFICE
Wilmar Sugar Australia
PO Box 642
Townsville QLD 4810
Ph: 07 4755 1972
Fax: 07 4724 5715

Mackay Sugar

CORPORATE OFFICE
Mackay Sugar Ltd
PO Box 5720, Mackay Mail Centre QLD 4741
Ph: 07 4953 8200 Fax: 07 4953 8340
Email: info@mkysugar.com.au
Website: new.mkysugar.com.au

NSW Sugar Milling Cooperative

CORPORATE OFFICE
NSW Sugar Milling Coop Ltd
Main Street, Ballina NSW 2478
Ph: 02 6681 2700 Fax: 02 6681 2799
Website: www.nswsugar.com.au

HARWOOD REFINERY
Harwood Island NSW 2464
Ph: 02 6640 0400 Fax: 02 6646 4550
Email: harwood@nswsugar.com.au

Marketing and terminals

Queensland Sugar Ltd

HEAD OFFICE
Level 14, 348 Edward Street
Brisbane QLD 4001

POSTAL ADDRESS
GPO Box 891, Brisbane QLD 4001
Ph: 07 3004 4400 Fax: 07 3004 4499
E: info@qsl.com.au
www.qsl.com.au

Sugar Terminals Ltd

HEAD OFFICE
Level 3, 348 Edward Street
Brisbane QLD 4001

POSTAL ADDRESS
GPO Box 945, Brisbane QLD 4001
Ph: 07 3221 7017 Fax: 07 3221 5593
E: info@sugarterminals.com.au
Website: www.sugarterminals.com.au

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2012–13 has seen major changes to RD&E in the Australian sugar industry. Sugar Research Australia (SRA) was declared as the industry services body in August 2013. The previous assets of BSES Limited, the Sugar Research Development Corporation, and some activities of the Sugar Research Institute, have been transferred into SRA.
The past 12 months have witnessed an unprecedented level of change in the research, development and extension (RD&E) landscape of the Australian sugarcane industry.

The Australian Sugar Industry Alliance (ASA), backed by the Australian Sugar Milling Council and Canegrowers Australia, steadfastly focused on finalising the Sugar RD&E Reform package.

One of the major elements of this reform was the formation of a new RD&E organisation.

Introducing SRA

Sugar Research Australia (SRA) was created by transferring the previous assets of BSES Limited and the Sugar Research Development Corporation, and some activities of the Sugar Research Institute into SRA.

The launch of SRA was a true demonstration of our industry working together to build a strong, viable and sustainable research investment platform for grower and milling businesses, and the many regional communities that sugarcane supports.

Through ASA, we have been able to work together as an industry and with government to make SRA a reality.

About SRA

The company was declared as the industry services body for the Australian sugar industry on August 5, 2013 after passage of the following legislation by the Commonwealth Parliament on June 28, 2013:

- Sugar Research and Development Services Act 2013.

In its role as the industry services body, SRA is entitled to receive the statutory levies paid by grower and milling businesses, and matching funds from the Commonwealth Government.

The statutory levy of 70 cents per tonne of cane is paid equally by both grower and milling businesses with each contributing 35 cents per tonne of cane.

Reaching our full potential through RD&E

SRA invests in and manages a portfolio of RD&E projects that drive productivity, profitability and sustainability for the whole-of-industry.

The RD&E projects that we currently fund focus on delivering good science that addresses the following key industry issues:

- **Industry growth** – increase yield and raise productivity.
- **Cost and profitability** – manage costs and increase profitability of cane and sugar production across different farm types and mills, and within the value chain.
- **Environmental and regulatory** – provide solutions that benefit the environment and allow growers and millers to meet regulations.
- **Diversification** – create potential growth opportunities through the production of biomass, fuel and new products.

It’s important that we capture and fund the most innovative ideas that are most likely to add value to our industry.

To achieve this goal all projects submitted through our contestable funding pool are evaluated by SRA’s Research Funding Panel.

The Panel led by Professor Alan Johnson AM, is an independent skills-based panel appointed by the SRA Board.

The panel’s role is to ensure that through rigorous and robust evaluation only those research projects that address industry and national priorities are funded and make our members’ businesses more profitable and sustainable.

The panel is ably supported by the Research Funding Unit (RFU) – a unit of specialist program managers who are responsible for the day-to-day management of SRA-funded research projects.

The panel will be assisted by the RFU and the...
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The committees will evaluate some of the applications received through the contestable funding process and consider the potential industry benefit, likely adoption levels and the impact that the successful project would deliver to the industry.

**Underpinning the success of our industry**

Our own team of in-house researchers continue to conduct research in the areas of plant breeding, trait development, biosecurity and farming systems.

This critical work sees the ongoing production of new varieties that are more productive, resistant to diseases and carry commercially important traits.

To reduce the risk of disease spreading throughout our industry we maintain a strong focus on improving our understanding of exotic threats, as well as supporting approved seed cane programs to minimise the spread of known diseases within Australia.

With the use of innovative technologies and practices for use on-farm, including the optimal use of sugarcane varieties, SRA's research teams develop better management principles for success.

We work in partnership with leading domestic organisations such as CSIRO Plant Industry, the University of Queensland, government and a range of other groups such as productivity service groups; millers; harvesting contractors and manufacturers; and natural resource management groups.

We also reach out to international sugarcane research organisations including DuPont to create collaborative opportunities and bring this knowledge and experiences to our shores for the benefit of our levy payers.

**Delivering best-practice extension advice**

With accountability for all SRA-funded projects, every dollar invested in research is being used to produce knowledge and practices that can be adopted on-farm and at the mill.

This extension activity will continue to be performed by SRA's Professional Extension and Communication Unit.

This technically-focused group connects the research, advisor and grower and milling communities by finding out what the latest research is saying and communicating this through events, technical guides, digital tools and our website.

**Planning for a successful future**

We work closely with our members, levy payers and industry representative bodies in a way that has not been seen in our industry before.

A new consultation process will be conducted to help create the company's 2013–17 Strategic Plan and shape the future research direction of the industry.

SRA is an industry-owned company and we have a commitment to listen to our levy payers to understand the issues, trends and opportunities that require a research solution on the farm and at the mill.

It's also important to balance local challenges with the national RD&E priorities that are focused on improving the sustainability and competitiveness of our and other agricultural sectors.

Grower and milling businesses, researchers and other participants in the industry will be invited to attend regional forums in the near future to provide their feedback. They will also be able to submit their comments via an online survey and through written responses.

The feedback received through the consultation process will be reviewed by ASA and other industry representative bodies prior to our Strategic Plan being finalised.

**Your SRA at work**

The SRA Board is acutely aware of industry's expectations for SRA.

We are dedicated to fulfilling these expectations by investing only in the best ideas and actively managing this research to deliver value to our industry.
CSIRO is working to breed better sugarcane varieties, produce better and more diverse products and improve mill and post mill processing to help support a sustainable and profitable future for the Australian sugar industry.

The secret life of sugarcane

CSIRO scientists are investigating unknown aspects of sugarcane’s biology to improve our knowledge of one of Australia’s most economically important but least understood crops. The results are both surprising and fascinating, and will underpin future work to improve sugarcane.

Such basic research is long overdue, according to CSIRO Sugar Group Leader Dr Anne Rae.

“Up until now, scientific understanding of what makes sugarcane tick has been patchy,” Anne said. “This is partly due to sugarcane’s relative genetic complexity – its genome is more than 10 times the size of the rice genome, for example – and partly due to the way we use the crop.” As CSIRO scientists get a better understanding of the genome and gradually unlock the complete sequence of sugarcane, they hope to develop faster ways to select varieties with the best combinations of genes.

Stalk rather than seed

Unlike most of Australia’s crops, sugarcane is harvested for its stalk rather than its seed, meaning that up until now, little attention has been paid to the plant’s reproductive mechanisms, such as flowering in the field.

“This understanding will also provide valuable baseline information for making regulatory decisions about future GM sugarcane varieties,” Anne said. The research has turned up a number of unexpected findings. It was unknown until recently that sugarcane pollen can travel tens of metres, for instance. CSIRO postdoctoral scientist Dr Johann Pierre explained: “Previously it was thought that sugarcane plants could only cross-pollinate with very close neighbours. Nothing was previously known about germination in the field”.

Sugar a sensitive little flower

Another unexpected finding was sugarcane’s flowering sensitivity. In order to flower, sugarcane requires the daylight period to shorten by an extra minute every day. If one extra minute is missed, the plant stops flowering – making it “a real prima donna” in Anne’s words.

Anne described the work of unravelling the molecular switches of sugarcane flowering as ‘fascinating’ and said it was particularly satisfying to be “uncovering what some would call the basic traits of such a well-known and established crop plant”.

“Imagine the potential if we can trick the plant into flowering when we wanted,” she said. “Sugarcane breeders would love us”.


Contact: Dr Anne Rae, CSIRO Plant Industry Ph: 07 3214 2379, Email: Anne.Rae@csiro.au

Dr Donna Glassop (left) and Dr Anne Rae in the CSIRO laboratory in Brisbane.

Sugarcane flowers up close and personal.
Climate ready sugarcane

With funding from SRDC, CSIRO’s Climate Adaption Flagship program is conducting a number of experiments to identify varieties of cane suitable for growing in an atmosphere with increased levels of carbon dioxide (CO₂).

The project, Climate ready sugarcane: Traits for adaptation to high CO₂ levels, began in July 2009 and is due for completion by the end of this year.

Lead researcher, Dr Chris Stokes, said within 50 years, Australia’s agricultural growing conditions will be very different and the world food consumption could almost double.

“Adapting to our changing climate is critical for Australian agriculture, so we need to start preparing the sugarcane industry for the future,” Chris said.

“Finding sugarcane varieties which are pre-adapted to future climate conditions and expanding production into new locations is vital. We hope cane growers will ultimately benefit from this research when the improved varieties are bred and produced,” he said.

Preliminary results have found that genotypes are responding differently to climatic stresses, strengthening the proposal for breeding programs for ‘climate-ready’ varieties. These varieties will ultimately provide not just continued yields, but support improved yields in these future conditions.

High CO₂ – Low water use

Some varieties have demonstrated significantly increased water use efficiency with elevated CO₂ levels.

“Broadly, we intend for our research to better inform decisions about complex long-term natural resource management issues,” Chris said.

“The aim of this project is to contribute to the sugar industry’s adaption to climate change by providing strategies that will maximise the benefits of increasing CO₂ levels, ultimately through more-effective varieties.

“It will also contribute to adaptive strategies for the sugarcane plant in terms of improved water-use efficiency, drought tolerance and growth, and assess the opportunity for selecting for greater response to elevated CO₂.”

Chris said the experimental complexity of the work was quite high, requiring minute control of water, temperature, humidity and CO₂ levels within large glasshouse areas. “Despite this, we have been able to achieve the levels of control of these parameters required to monitor and understand the subtle changes in plant physiology,” he said.

“The first two experiments in the project established CO₂ response curves for leaf segments, developed a rapid screening method for evaluating responsiveness of clones, and fine-tuned the approaches for controlling and measuring wholeplant water use and water stress responses.

“This year, the project will complete the final experiment investigating six clones for responsiveness to elevated CO₂ using the rapid screening method developed from findings of the initial experiment.” Chris said his research indicated that elevated CO₂ (from a baseline level of 390 ppm to an elevated level of 720 ppm) increased whole-plant water use efficiency by about 23 per cent.

“This suggests that changes in water use efficiency are the dominant effect of CO₂ on sugarcane and that any other potential mechanisms are unlikely to contribute substantially to changes in growth,” he said.

“This work further confirms the results of the first experiment where elevated CO₂ levels have significantly increased water use efficiency of the plants. “Furthermore there is evidence of a genetic base to the variation in water use efficiency across the fourteen clones used in the experiments.

“This indicates that there may be potential value in considering CO₂ responses when selecting sugarcane varieties for future CO₂-rich climates,” Chris said.

The final report will be available in late 2013. Visit: www.csiro.au/Outcomes/Climate/Adapting/Adapt-Future-Climate-Crops.aspx

Contact: Dr Chris Stokes, CSIRO Systems Ecologist, James Cook University
Ph: 07 4753 8640 Email: chris.stokes@csiro.au

Drawn from SRDC Sugar Researcher EDITION 2: 2013.
New SRDC funded research projects in 2013

In January 2013 the Sugar Research and Development Corporation announced up to $1.8 million has been allocated to fund 14 new research projects for the sugarcane industry from 1 July 2013.

Projects will be delivered by BSES Limited, CSIRO Plant Industry, Queensland University of Technology Centre for Tropical Crops and Bio-commodities, CSIRO Entomology, CSIRO Ecosystems Sciences, QUT Science and Engineering Faculty, University of Southern Queensland and the Queensland Department of Agriculture, Fisheries and Forestry.

Growing the crop


This three year project, led by BSES, hopes to develop cytogenetic/molecular marker-based methods to select potentially high-value progeny from the introgression program. These methods will allow breeders to short-circuit traditional breeding by allowing early selection on progeny based on molecular markers rather than traditional resistance screening.

Mass production of the Adelina disease to better manage greyback canegrubs (BSS356). Researcher: Nader Sallam, BSES Limited.

This three year project, led by BSES, will investigate the feasibility of producing the Adelina, a pathogen of the cane grub, on a large scale. Two methods will be trialled for production; conventional laboratory breeding and cell culture breeding. The resulting Adelina will be tested for its ability to infect healthy grubs and may possibly be used for an Adelina-based biocide.

Applying the genome sequence for variety improvement: validation of BAC gene markers and development of high throughput markers for implementation (CPI030). Researcher: Karen Aitken, CSIRO.

This five year project, led by CSIRO Plant Industry, aims to take the current single sequence repeat (SSRs) gene markers that underlie traits of agronomic importance and convert them to single nucleotide polymorphism (SNP) markers. The project will firstly validate the selected markers and secondly to develop a cost effective high throughput SNP system to implement them in the current breeding program.

Accessing stress resistant sugarcane and sugarcane research investment in China (CPI028) Researcher: Phil Jackson, CSIRO.

This four year project, led by CSIRO Plant Industry, will aid the development of a partnership with breeding programs in China. Yunnan Academy of Agricultural Sciences (YAAS) is proposing a large program in China to develop high yielding and water efficient varieties. Australian breeding programs will obtain access to outputs from this program in return for some technical advice and assistance. This project will fund the time input from Australian scientists to facilitate the cooperative project with China.

Innovative approaches to identifying the cause of chlorotic streak and new management strategies (BSS357) Barry Croft, BSES Limited.

This three year project, led by BSES, hopes to identify the causal agent for chlorotic streak, develop a diagnostic assay, and understand disease transmission in an effort to better manage the disease.

Strategies to manage soil-borne fungi and mitigate sugarcane yield decline (CSI001) Researcher: Paul Harvey, CSIRO.

This three year project, led by the CSIRO Sustainable Agriculture Flagship aims to characterise soil and rhizosphere fungal communities in two differing sugarcane farming systems and define the dynamics of key pathogenic and disease suppressive microbes.

Rapid detection of ratoon stunting disease (CSI002) Researcher: Amalia Berna, CSIRO.

This three year project, led by CSIRO Food Futures Flagship, aims to develop a rapid ‘sniff test’ to diagnose ratoon stunting disease using a new technology called ‘E-nose’ or electronic nose.

Selecting for favourable plant – soil water interactions (CPI029) Researcher: Phil Jackson, CSIRO.

This four year project, led by CSIRO Plant Industry, will screen a large range of potential parental germplasm for traits conferring higher yields under limited soil water conditions, including material outside of the Australian breeding program. From this, they hope to introgress these features into commercial breeding parents and cultivars.

Exploiting introgression for the development of productive and regionally adapted varieties for NSW (NSC022). Researcher: Rick Beattie, NSW Sugar Milling Co-operative.
This seven year project, led by NSW Sugar Milling Cooperative, will explore the variety improvement opportunities available through introgression.

Introgression offers access to genes in wild sugarcane related germplasm that may be suitable for two year old cropping or frosting. The project will fast-track clones from an existing BSES research project (BSS344) New Germplasm to develop more productive varieties with enhanced resistance to nematodes, Pachymetra root rot and smut into the NSW two-year cropping cycle selection program.

**Milling the crop**

A retrofit to a mill to reduce its operational and maintenance costs (QUT059) Researcher: Geoff Kent, QUT.

This three year project, led by QUT, plans to remove the delivery (final) roll and trash plate from the milling unit design as a means of reducing maintenance and operating costs of a milling unit. This will result in a five-roll mill design and reduce compressions through the milling unit from four to three.

Linking raw sugar quality to sugarcane field attributes (QUT061) Researcher: Les Edye, QUT.

This three year project, led by QUT, aims to investigate the links of growth of sugarcane in the field and soil microorganisms to raw sugar quality.

Reducing the maintenance costs of mill rolls (QUT 060) Researcher: Geoff Kent, QUT.

This four year project, led by QUT, will trial an alternative welding process to the current arcing process for mill rolls. The new process is called plasma transfer arc welding and it is hoped that it will reduce mill maintenance costs and reduce emissions associated with the current welding practices.

**Skills and capabilities**

Developing targeted, seamless weather/climate forecasting systems for critical early season harvest periods (JCU033) Researcher: Roger Stone, USQ.

This three year project, led by Australian Centre for Sustainable Catchments at University of Southern Queensland, aims to develop a pilot system offering greatly improved weather and seasonal climate forecasts for critical harvest periods for the sugar industry and will target important sugar production regions.

Developing remote sensing as an industry wide yield forecasting, nitrogen mapping and research aide (DPI025) Researcher: Andrew Robson, QDAFF.

This three year project, led by the Queensland Department of Agriculture, Fisheries and Forestry, has three objectives; refine the accuracy and delivery of yield forecasts derived from satellite imagery, evaluate multispectral and hyperspectral tools for use in evaluating field trials, and measure canopy nitrogen status.


**TRANSITION OF SRDC FUNDED PROJECTS TO SRA**

The Sugar Research and Development Services (Consequential Amendments and Transitional Provisions) Act 2013 has now transferred the assets and liabilities of the Sugar Research Development Corporation (SRDC) to SRA.

This means that all prior SRDC funded projects now belong to SRA and the administration of the financial and project management for this portfolio will be conducted by SRA’s Research Funding Unit (RFU).

The SRA Board has agreed to fund all existing contracted research projects for the 2013–14 financial year.

Research projects which extend beyond this date will be assessed for their alignment against the SRA Strategic Initiatives of Industry Growth; Cost and Profitability; Environmental and Regulatory Issues; and Diversification.

This will ensure that an appropriate and balanced investment portfolio that delivers outcomes to industry exists.

Drawn from SRA Industry Update 28 October 2013.
FOR some time, the sugarcane industry has been considering new structures for the management of Research, Development and Extension (RD&E) activities on behalf of the industry in Australia.

On June 28, 2013, Bills to implement structural reforms for sugar research and development were passed by the Australian Parliament. As part of these reforms, the Sugar Research and Development Corporation (SRDC) will be abolished on 30 September 2013.

On August 5, 2013, the Minister for Agriculture, Fisheries and Forestry declared Sugar Research Australia (SRA) Limited as the industry services body for the sugar industry. Since July 1, 2013, SRDC has facilitated the transfer of assets, liabilities and RD&E projects to SRA. SRDC will officially close on September 30, 2013.

Management of current and previously SRDC approved RD&E projects are now overseen by SRA.

On behalf of the SRDC Board and team, I wish to acknowledge the tremendous work delivered by talented researchers and scientists in Australia and overseas. Their innovative and world class research created significant breakthroughs for the Australian sugarcane industry.

I would also like to acknowledge the commitment and dedication of staff from SRDC, who managed RD&E projects to the highest standard and communicated outcomes back to industry.

Without the researchers, growers and millers active involvement in SRDC’s programs and their willingness to drive the Australian sugarcane industry into a sustainable future, SRDC would not have been able to achieve what it has in its 23 years of operation.

Although my team and I won’t be continuing on with SRA, we will eagerly watch the expansion of the industry as a result of advances made by SRA and we wish the new team all the best in the future.

Annette Sugden
Executive Director
13 September 2013
R&D organisations
contact details

**ASSCT**
Australian Society of Sugar Cane Technologists: Secretariat

**POSTAL ADDRESS**
PO Box 5596
Mackay Mail Centre QLD 4741
Ph: 07 4954 3956
Fx: 07 4954 3956
E: assctadmin@ozemail.com.au
Website: www.assct.com.au

**SRA**
Sugar Research Australia
(50 Meiers Road), PO Box 86
Indooroopilly QLD 4068
Ph: 07 3331 3333
Fax: 07 3871 0383
E: sra@sugarresearch.com.au
Website: www.sugarresearch.com.au

**Cane Productivity & Sugar Services**

- **Bundaberg**
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AUSTRALIAN OFFICE
Canegrowers Building
Level 6, 190 Edward Street, Brisbane
GPO Box 1032 Brisbane QLD 4000
Ph: 07 3864 6444
Fax: 07 3864 6429
E: enquiry@canegrowers.com.au
www.canegrowers.com.au

STATE OFFICES
New South Wales
NSW Canegrowers Association
51 Richmond Street
PO Box 27 Wardell NSW 2477
Ph: 02 6683 4205
Fax: 02 6672 6031

Queensland
Queensland Canegrowers
Organisation
Canegrowers Building
GPO Box 1032
Level 6, 190 Edward Street
Brisbane QLD 4000
Ph: 07 3864 6444
Fax: 07 3864 6429
E: enquiry@canegrowers.com.au

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Fax: 07 4098 3567

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Innisfail
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Tully
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Ph: 07 4068 4900
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Ph: 07 4783 4800
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Ph: 07 4782 1922
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Government bodies

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Woongoolba QLD 4207
Ph: 07 5546 1481
Fax: 07 5546 1481

NSW Canegrowers Association
51 Richmond Street
PO Box 27 Wardell NSW 2477
Ph: 02 6683 4205
Fax: 02 6672 6031

NSW Department of Agriculture, Fisheries and Forestry
51 Richmond Street
PO Box 27 Wardell NSW 2477
Ph: 02 6683 4205
Fax: 02 6672 6031

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