AUSTRALIAN Sugar Milling COUNCIL

An Australian perspective

ISSCT Factory Workshop

10 May 2010

The Australian industry – full of potential

- Where is the industry and who are the players?
- Australian production – existing trends, what's changing
- Australian export
- So what about renewable energy?
  - Existing market
  - Potential
  - Will it ever happen?
  - Implications for future product diversification
- Outlook for Australian Sugar industry

Sugar milling companies, mills and indicative annual crush



Mossman Mill – 1.6%

Mulgrave, Tableland, Babinda & South Johnstone Mills – 9.7%

Tully Mill – 6.3%

Victoria, Macknade, Invicta, Pioneer, Kalamia, Inkerman and Plane Creek Mills – 39.8%.

Proserpine Cooperative Mill – 5.7%

Farleigh, Marian and Racecourse Mills – 18.5%

Millaquin and Bingera Mills – 5.1%

Isis Mill – 4.0%

Maryborough Mill – 2.3%

The Heck Group, Rocky Point Mill – <1%

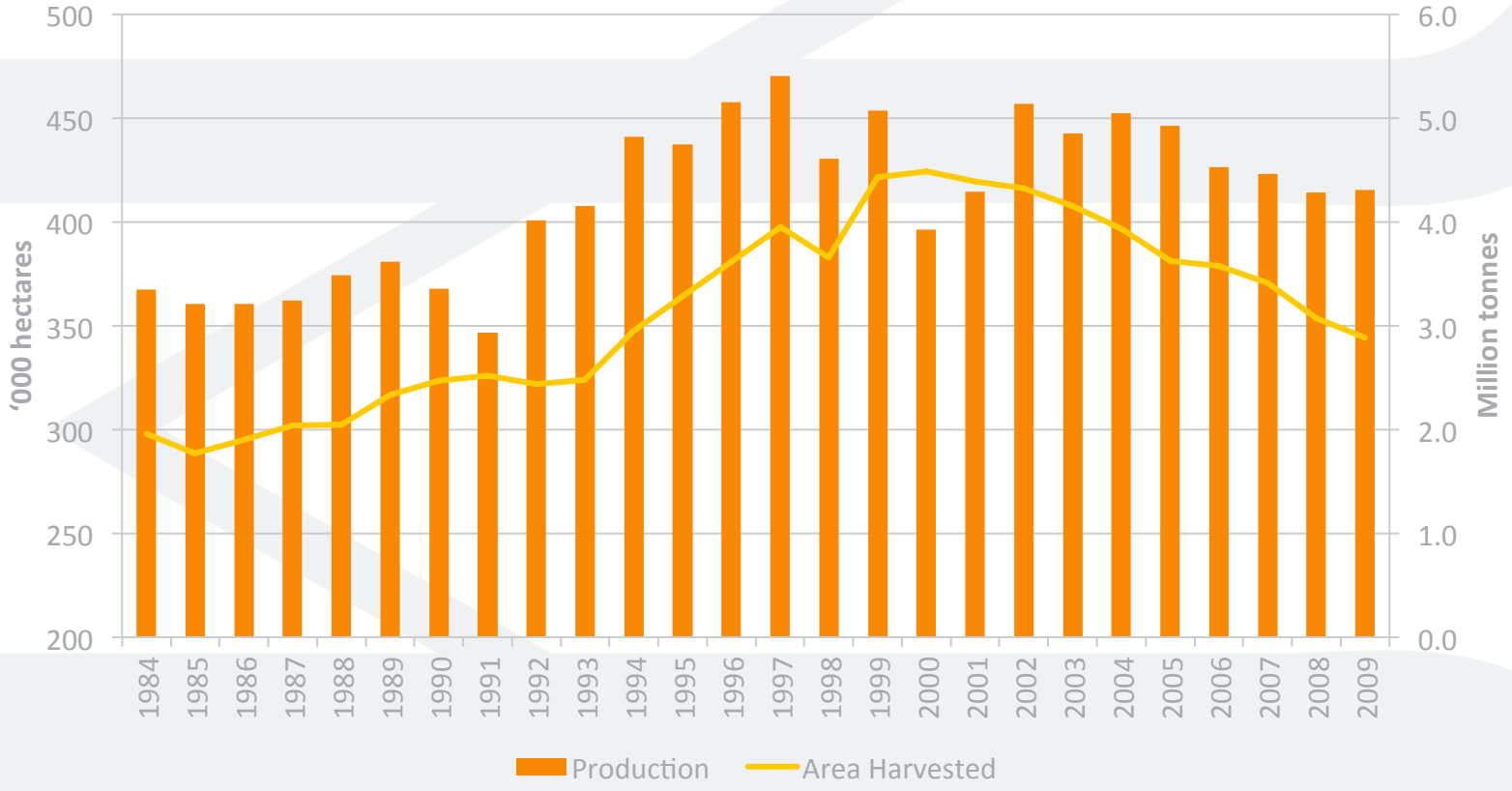
NSW Sugar Milling Cooperative, Condong, Broadwater and Harwood Mills – 6.3%

Australian summary

Over 35 million tonnes potential production.

22 QLD mills, 3 NSW mills

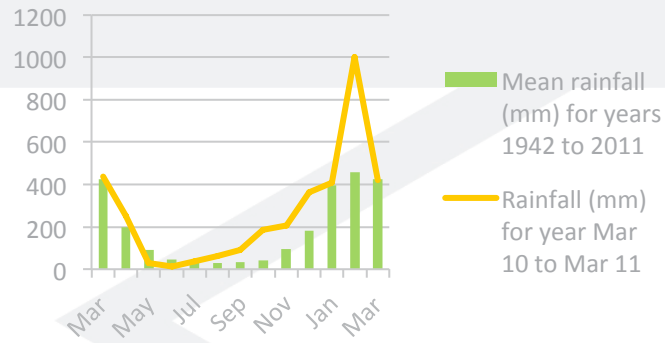
Australian Production



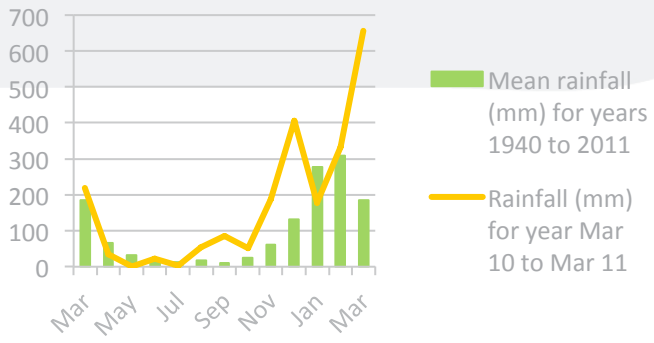
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The 2010/2011 Season – mitigating factors

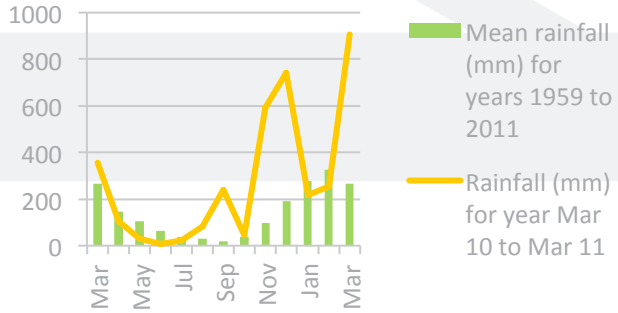
Cairns



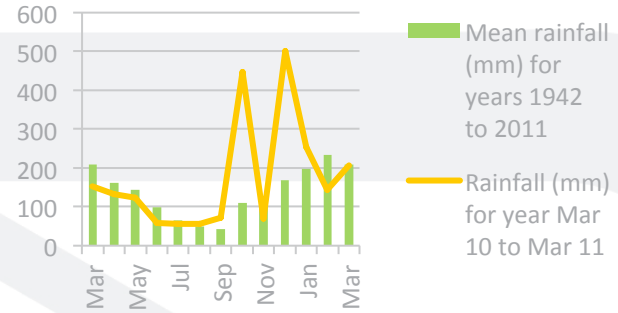
Townsville



Mackay



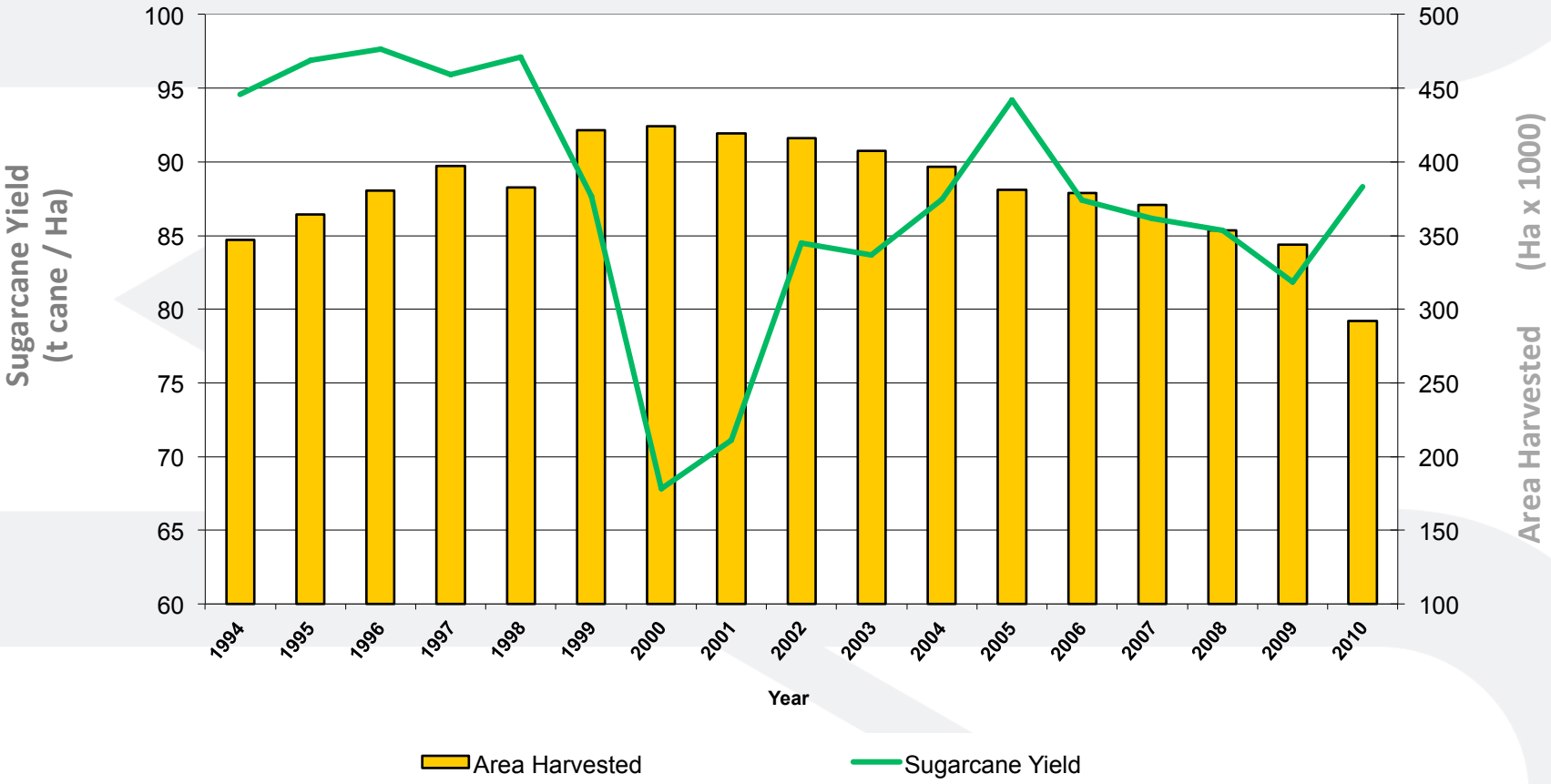
Murwillumbah



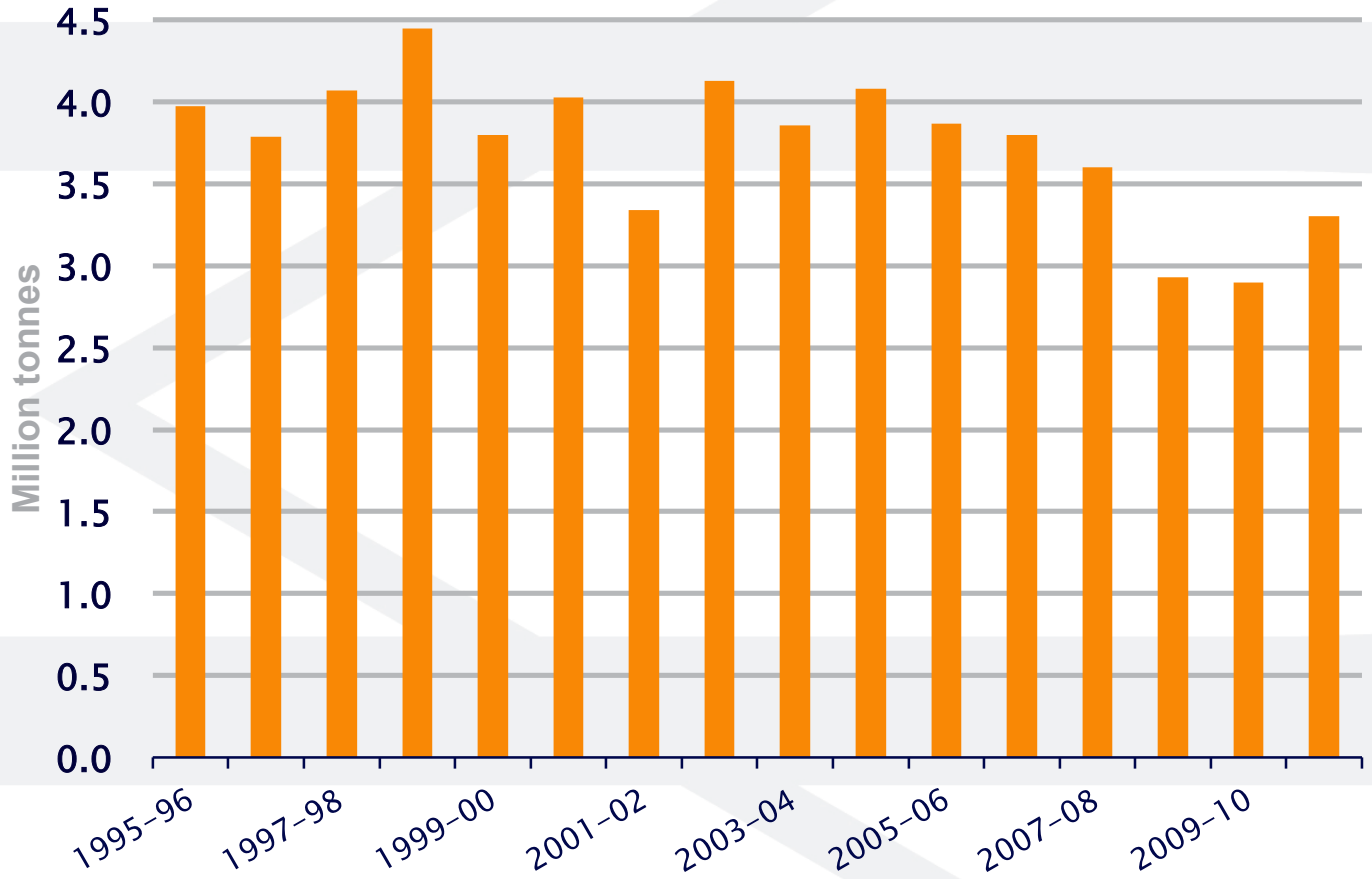
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Area harvested versus sugarcane yield

(1994 - 2010)



Australia's export quantity is reliable



Potential Sugar Industry Cogeneration - RET Dependant



FAR NORTH QLD
Existing capacity - **71MW** (installed) **31.5MW** (export)
Potential Projects Capacity – **146MW** Potential Projects Export **128MW**
Potential Households Serviced – **84,000** / 70 % Households

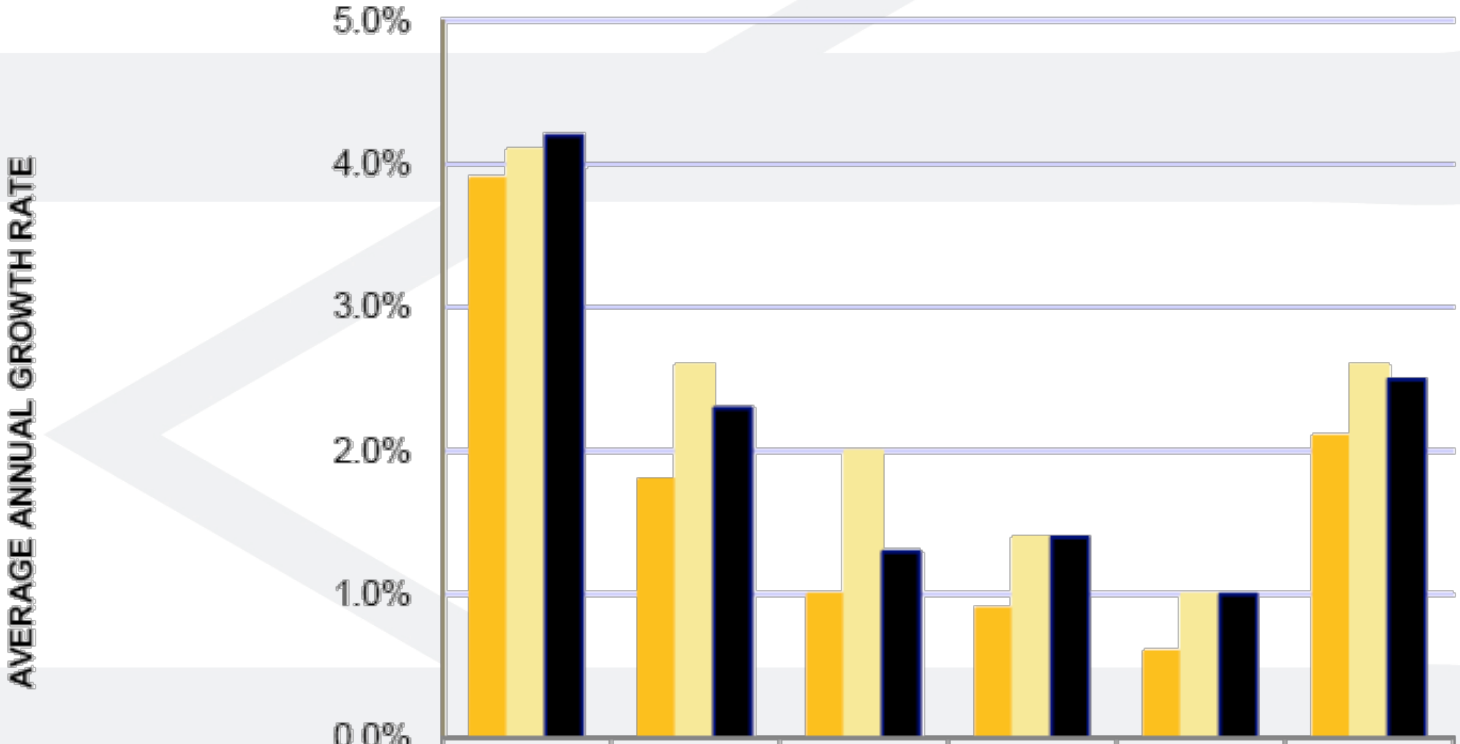
NORTH QLD – HERBERT / BURDEKIN:
Existing capacity - **157MW (**installed) **101MW** (export)
Potential Projects Capacity – **172MW** Potential Projects Export 164**MW**
Potential Households Serviced – **140,000 /** more than total region

WHITSUNDAY HINTERLAND AND MACKAY – CENTRAL REGION
Existing capacity - 73**MW** (installed) **23MW** (export)
Potential Projects Capacity – **107MW** Potential Projects Export **91MW**
Potential Households Serviced – **60,000** / 80% Households

WIDE BAY BURNETT – SOUTHERN REGION:
Existing capacity - **54MW** (installed) **30MW** (export)
Potential Projects Capacity – **125MW** Potential Project Export **97MW**
Potential Households Serviced – **67,000** / almost 50%

NORTHERN NSW
Existing capacity - **75.5MW** (installed) **54MW** (export)
Potential Project Capacity – **26MW** Potential Project Export **22MW**
Potential Households serviced – **40,000** / 50% Tweed Valley and 25% Richmond Valley Power Requirements

Renewable Energy - the opportunity

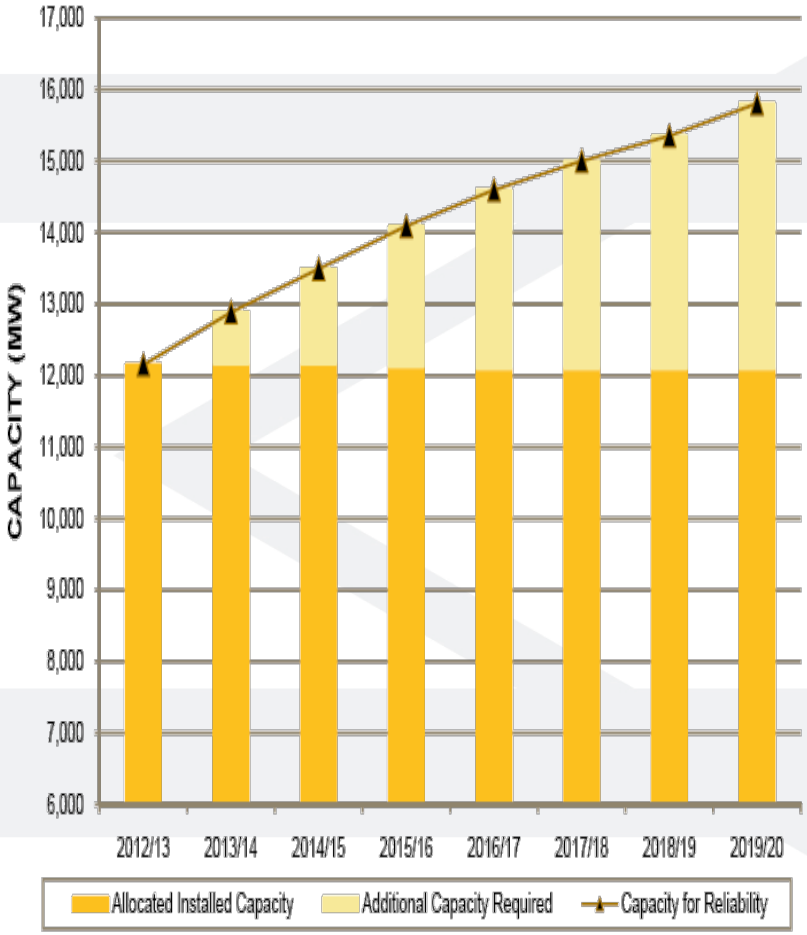


	QLD	NSW	VIC	SA	TAS	NEM
Energy consumption	3.9%	1.8%	1.0%	0.9%	0.6%	2.1%
Summer maximum demand	4.1%	2.6%	2.0%	1.4%	1.0%	2.6%
Winter maximum demand	4.2%	2.3%	1.3%	1.4%	1.0%	2.5%

Additional capacity investment 2010/20

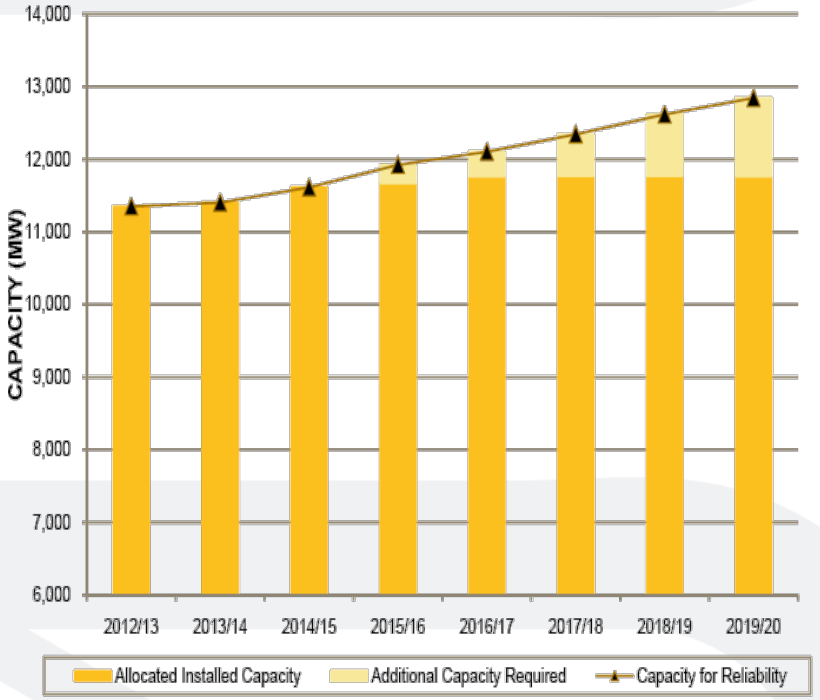
Proposed new generation and demand side projects:	
Queensland	3,172 MW
NSW	10,907 MW
Victoria	6,745 MW
South Australia	3,919 MW
Tasmania	748 MW

Critical reliability



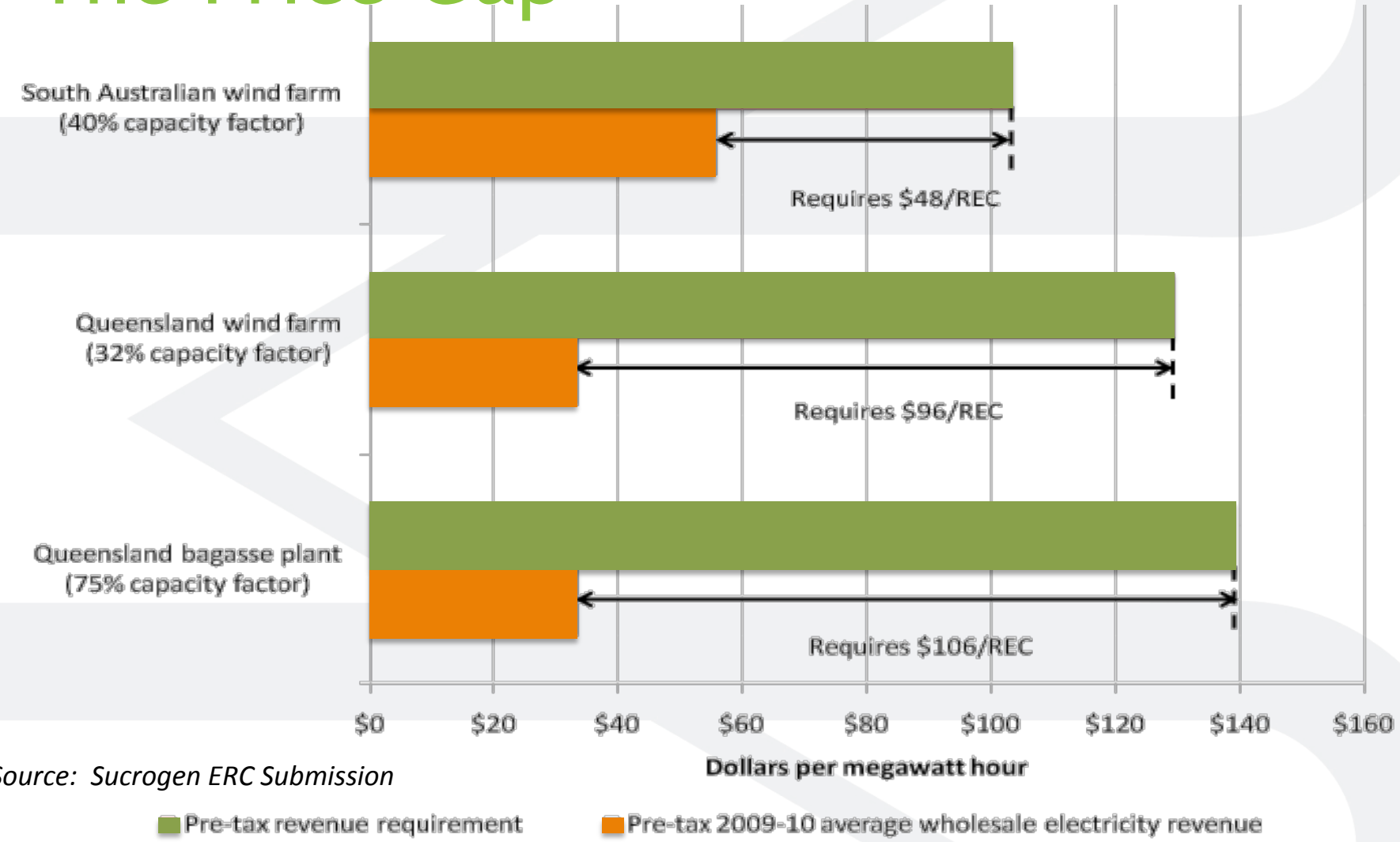
Queensland supply-demand outlook 2012/13 – 2019/20

Victoria supply – demand outlook
2012/13 – 2019/20



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The Price Gap



Source: Sucrogen ERC Submission

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Thank you.