

# REVITALISING AUSTRALIAN SUGAR

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# MILLING SNAPSHOT



**4.7 million tonnes (mt)**  
production (2018)



**A\$4 billion**  
in economic contribution



**23,000 jobs**

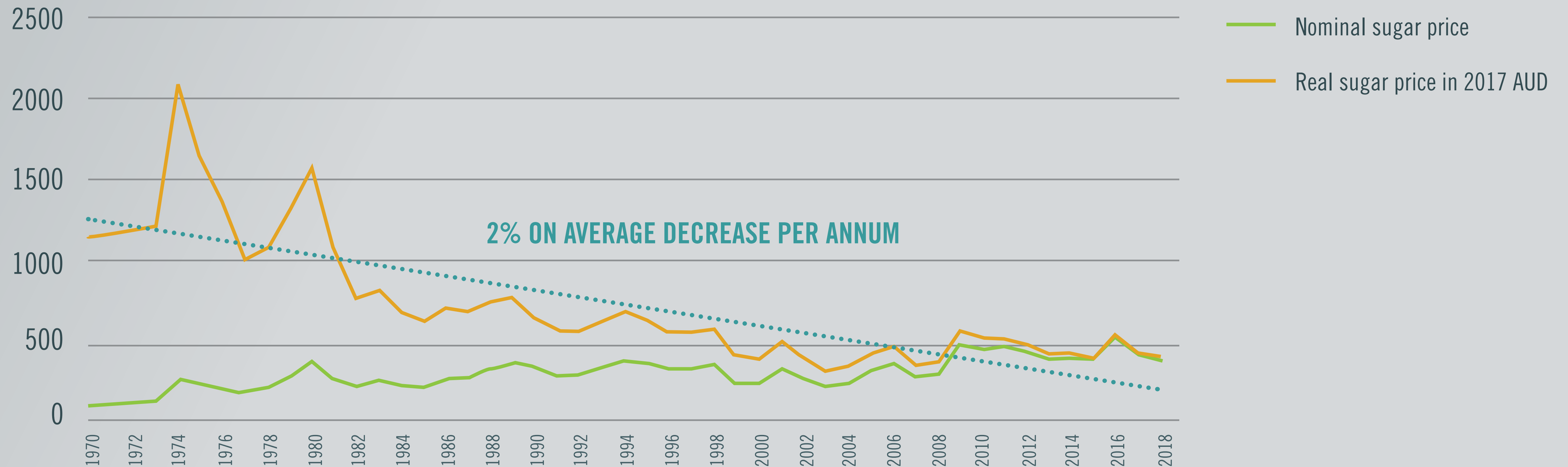
# OPERATING ADVANTAGES

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- No government subsidies
- 2.5 mt bulk storage
- Efficient rail transport system
- Energy self-sufficiency
- Industry-govt research body
- Single-desk marketing disbanded
- Proximity to Asia
- Mostly foreign owned

# THE CHALLENGE

RAW # 11 SUGAR PRICE NOMINAL AND REAL (AUD) 1970-2018



SOURCE: USDA (PRICES), ABS (CPI), ATO (FOREX)



# THREE PILLARS

## INDUSTRY-GOVERNMENT REVITALISATION STRATEGY

1

PRODUCT  
DIVERSIFICATION

2

ACREAGE  
GROWTH

3

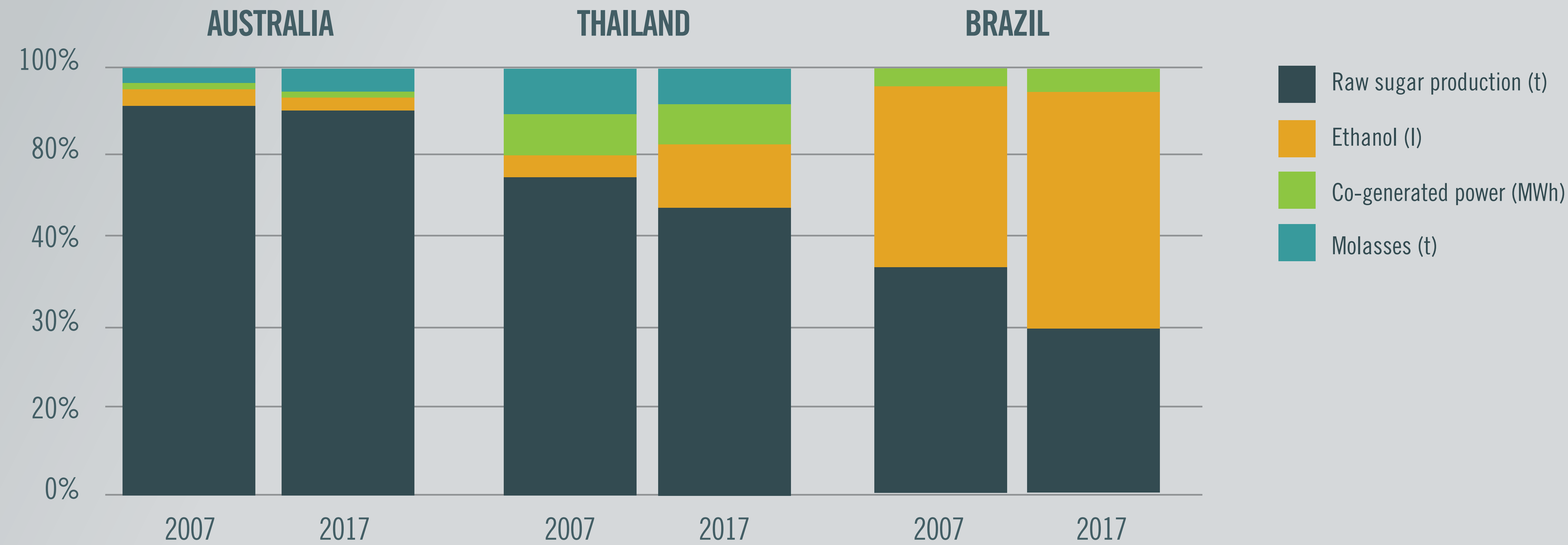
CANE AND  
SUGAR YIELD

> 2% REVENUE GAINS PER ANNUM THE OBJECTIVE



# DIVERSIFICATION STRATEGIES IN ACTION

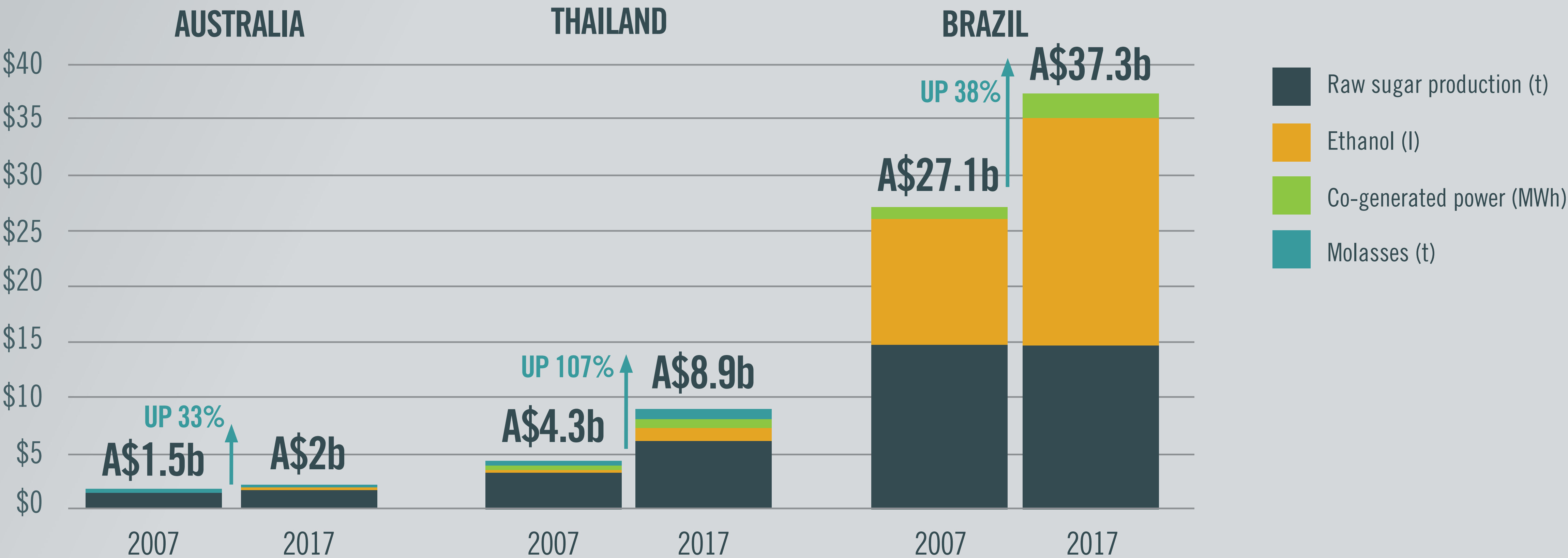
MILLING REVENUE MIX 2007 & 2017 (AUD)



SOURCE: ASMA, UNICA AND THAI SUGAR MILLERS

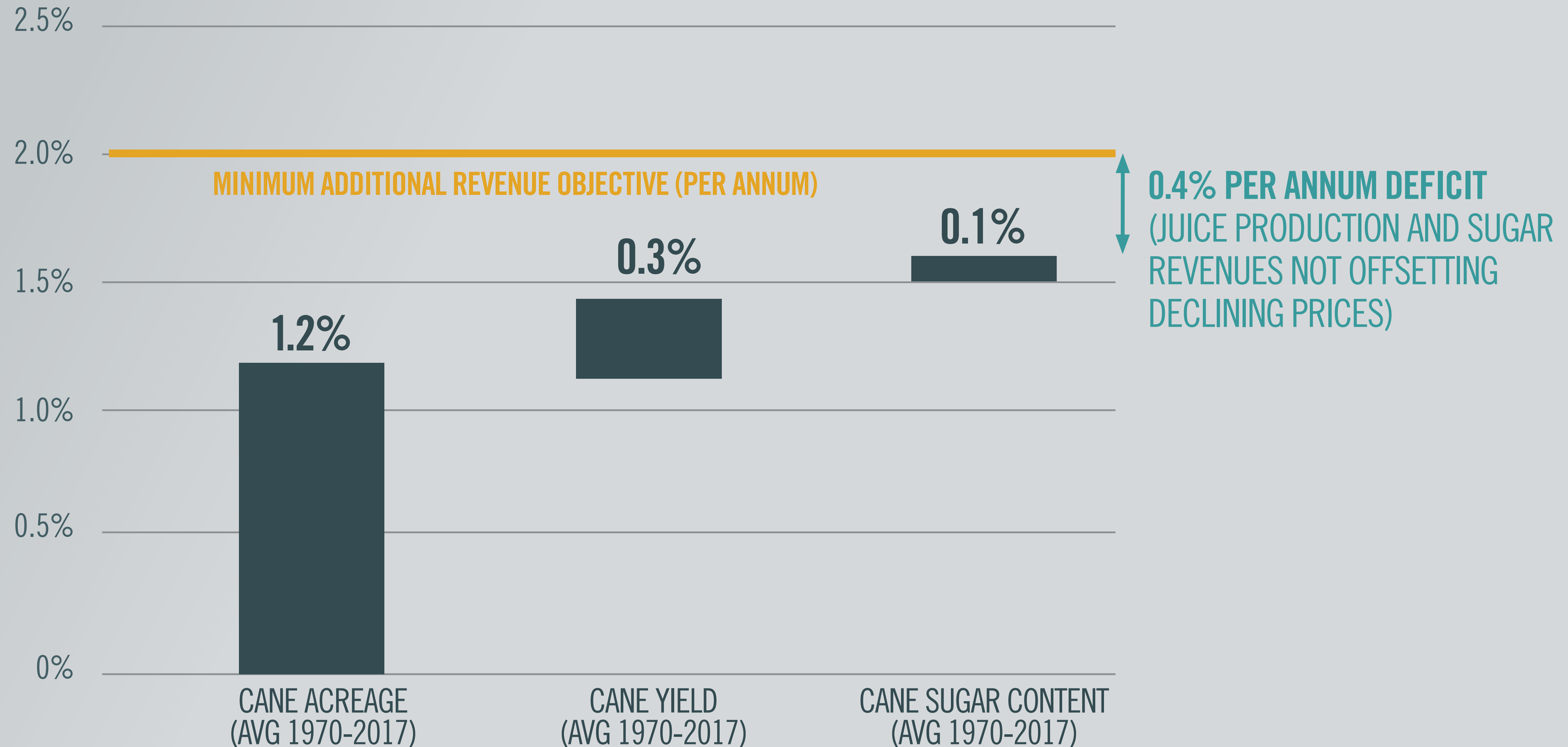
# GROWTH IN MILLING REVENUES 2007 TO 2017

(CONSTANT AUD BILLIONS)



SOURCE: ASMA, UNICA AND THAI SUGAR MILLERS

# THE PROBLEM STATEMENT



SOURCE: ABARES AND ASMC



# POTENTIAL REMEDIES

Research &  
Development

Farming Practices –  
yield & acreage

Infrastructure

Milling Practices

**GOVERNMENT  
POLICY SETTINGS**

Market Intelligence

Social Licence

Collaboration

Incentives



# ANY QUESTIONS?

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## KEY FOCUS AREAS



Trade  
policy



Social  
licence



Advocacy



Revitalisation



Research  
strategy