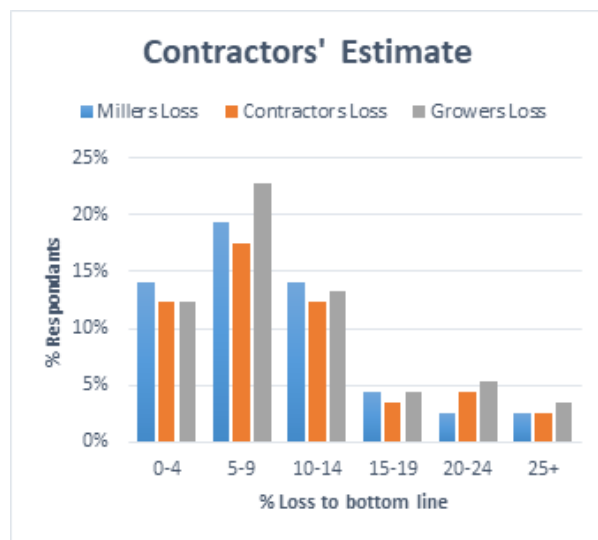
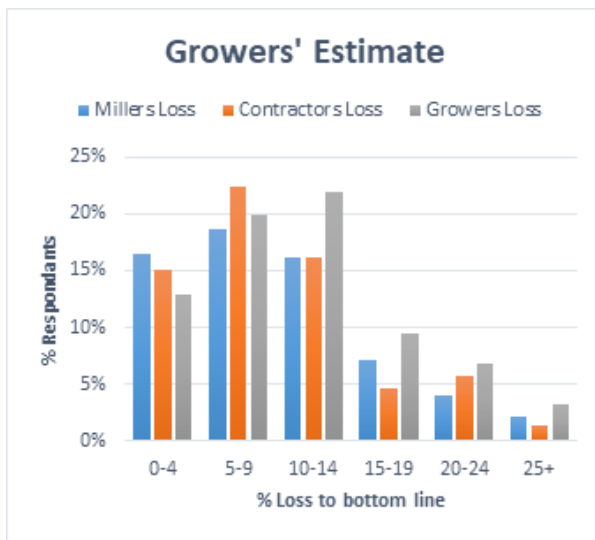


GROWER AND CONTRACTOR SURVEY

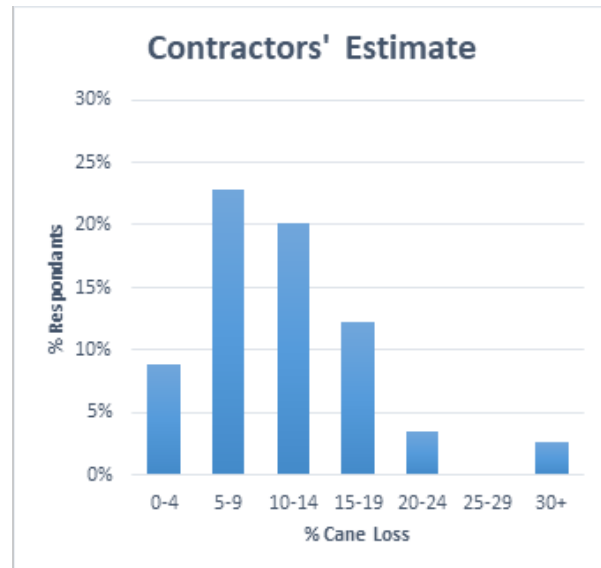
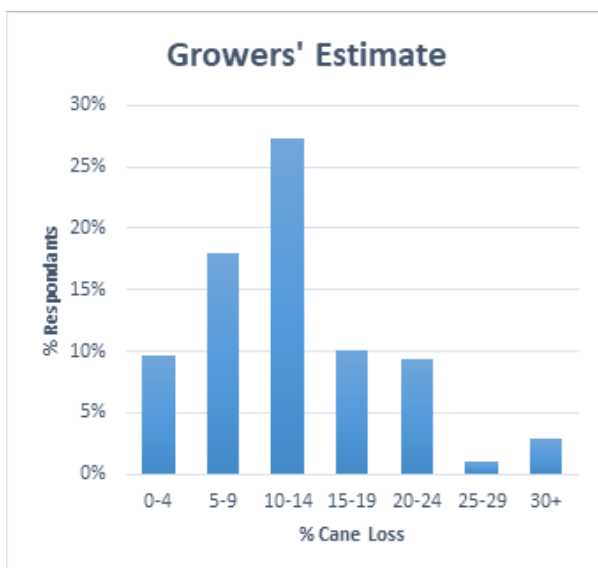
Survey Information

- Developed in association with Dr Dominique Greer from QUT
- Supported and circulated by ASMC, CANEGROWERS, ACFA and SRA Adoption Team
- 290 Growers and 114 Contractors participated

Estimated percentage loss to the bottom line of each sector caused by harvester cane loss

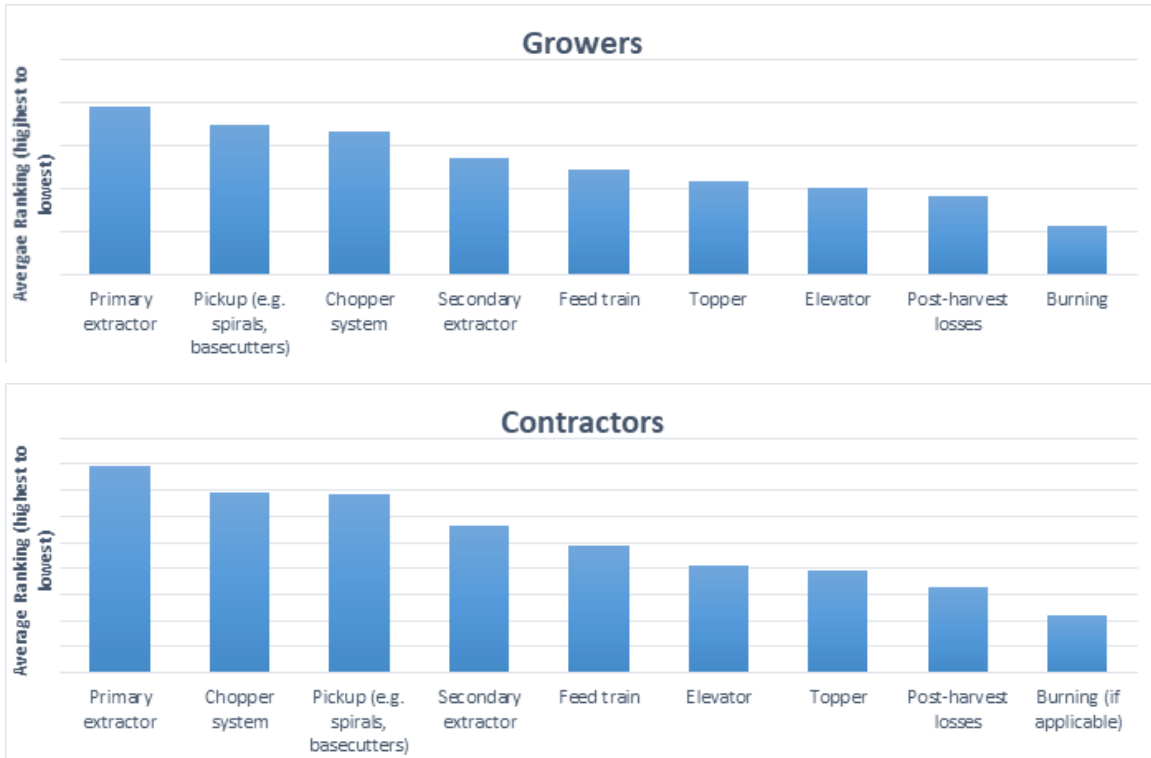


Estimated percentage cane loss due to harvesting

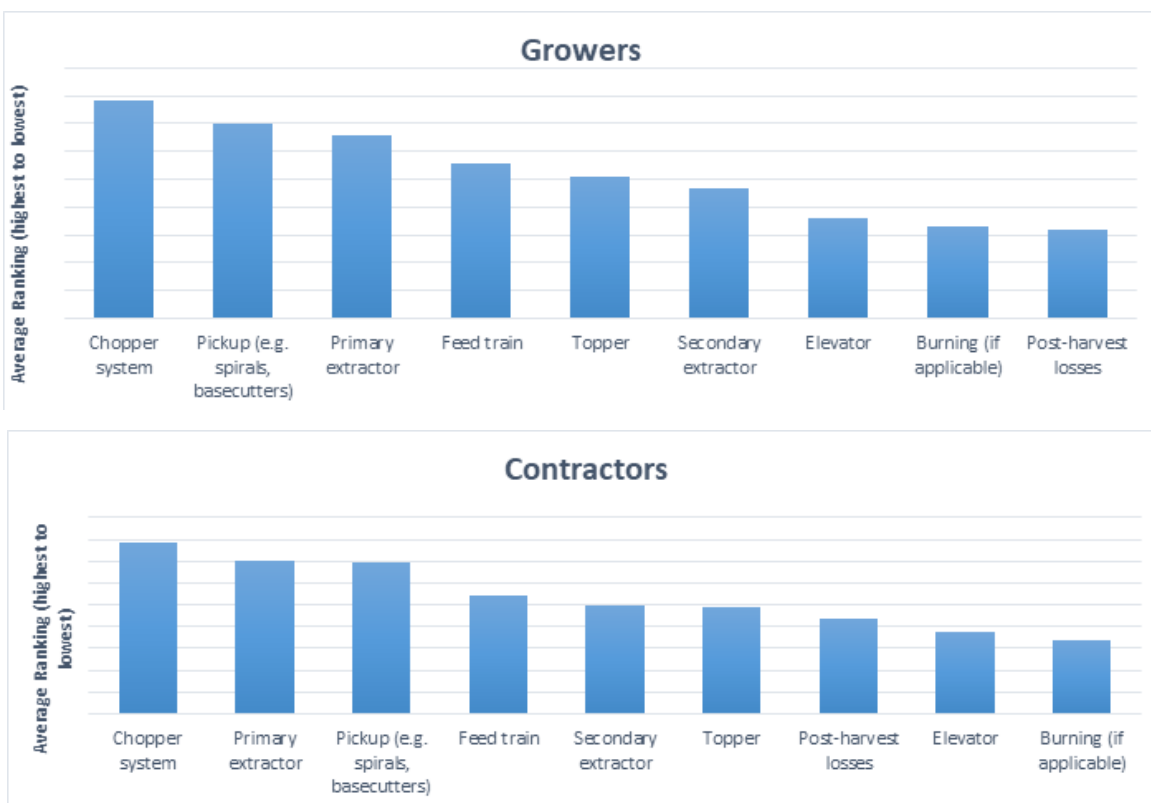


Both growers and contractors identified mechanised harvesting as a large source of cane loss. On a 36 million tonne crop, such as that experienced in 2016, a conservative 12% loss equates to 4.32 million tonnes of cane.

Processes with greatest impact on losses

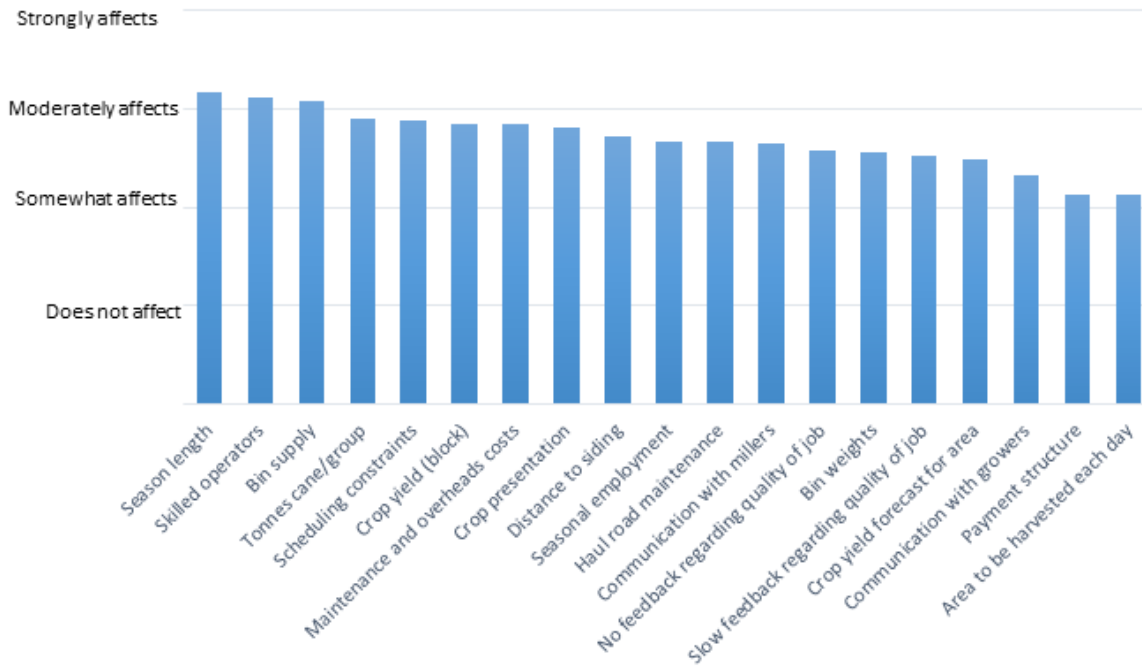


Processes with greatest impact on quality

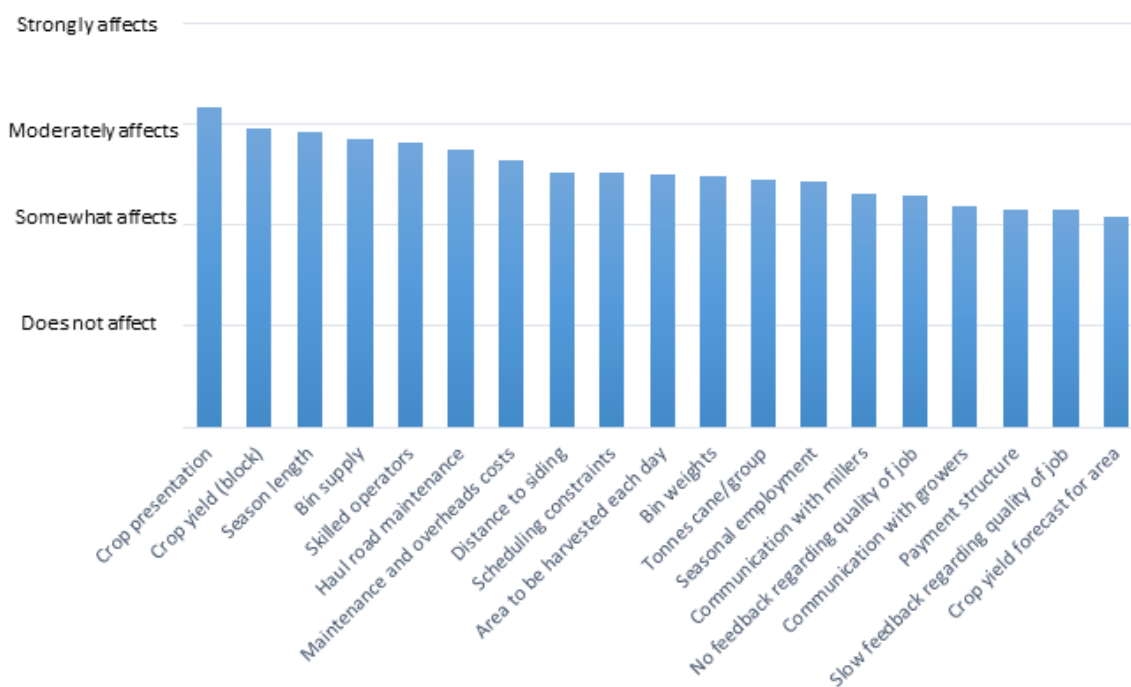


Factors affecting harvesting

Growers' Rankings



Contractors' Rankings



Other interesting notes from the survey

Growers:

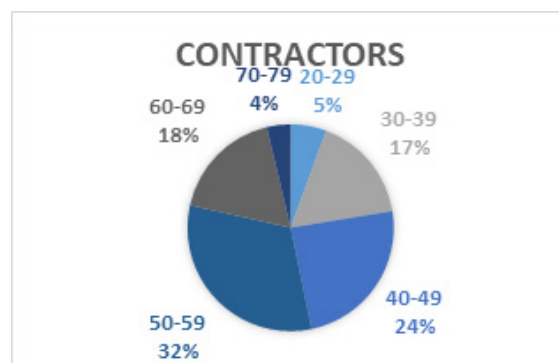
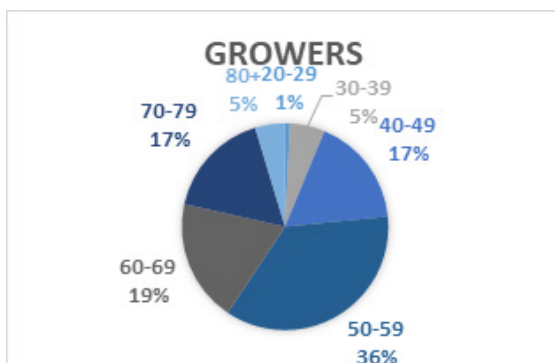
- 38% have operated a harvester before
- 70% do not offer incentives (very few of these 'incentives' are financial)
- 61% believe their contractor is providing the best job for them in the current industry
 - Main complaints: too fast, billet length too short, not enough maintenance or checks
- 12% believe they are not providing the best possible conditions for the harvester
 - Row lengths, headlands, row profiles, row widths
- 20% do not check performance of their contractor and provide feedback
 - Check is mainly visual (ground job)
 - 77% do not encourage their contractor to top (main reason being crop presentation)
- 70% believe sensors will help harvesters and contractors
 - Main impediment is capital cost and ongoing maintenance
- Most ranked hands-on approaches to receiving information (workshops, shed talks, field days) about harvesting much higher compared to other approaches such as online or magazine articles.

Contractors

- A number of survey participants had multiple roles (owner, operator, haulout driver, contract negotiator, harvest scheduling)
- ~80% believe harvesting cane loss affects growers' and millers' bottom lines but only 70% believe it affects a contractors' bottom line
- ~78% believe they are providing the best service they can for growers and millers in the current industry
- 36% believe farmers are not providing them the best conditions for harvesting
 - Row profiles, headlands, etc
- 55% believe sensors with feedback to the driver will improve quality and loss issues
- Provided over 20 different reasons standing in the way of adopting sensors
- Not much consistency between participants in varying harvester settings to suit different crop conditions, however, most contractors said they did encounter less than ideal harvesting situations (lodged crop, small headlands, short row lengths)
- 57% felt their equipment could handle more tonnes but only 33% wanted more tonnes
- Most ranked hands-on approaches (workshops, shed talks, field days) to receiving information about harvesting much higher compared to other methods such as on-line or magazine articles.

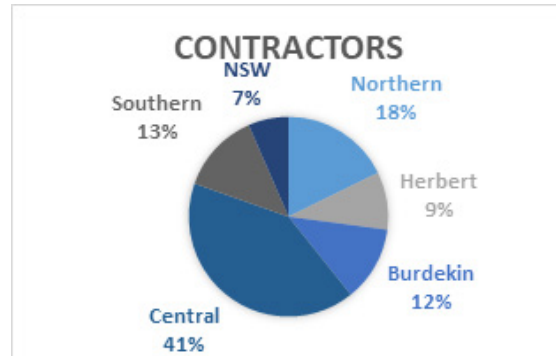
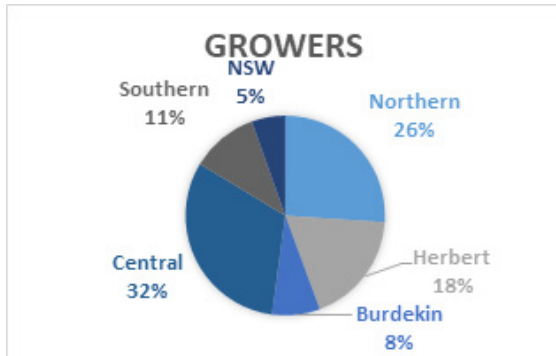
Survey participants' information

Age

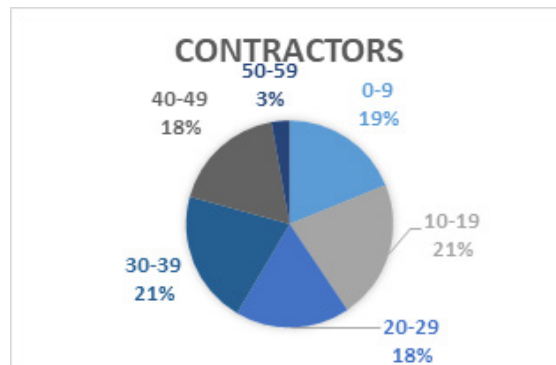
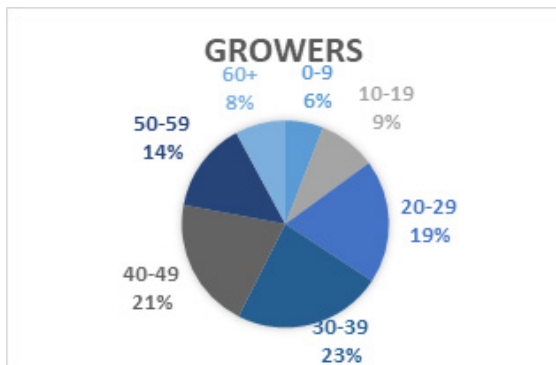


Survey participants' information (continued)

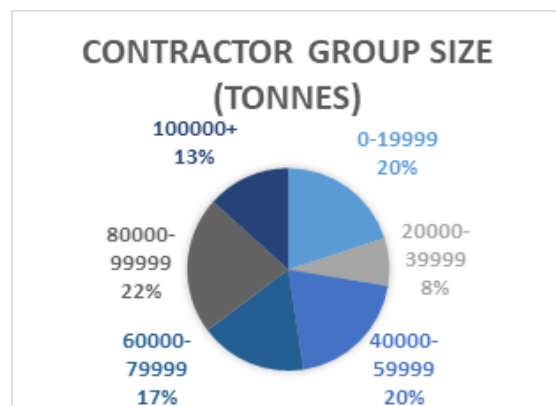
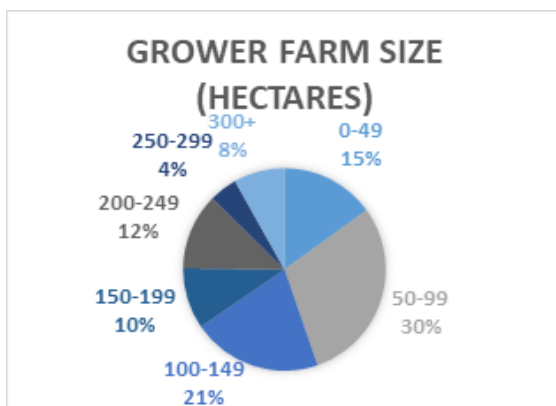
Region



Years' experience



Size of operation



This work is part of a large project called Enhancing the sugar industry value chain, which is funded by the Department of Agriculture and Water Resources and SRA as part of the Rural R&D for Profit Program.



Australian Government
Department of Agriculture
and Water Resources

SCAN
consulting

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