Welcome to the third annual Cotton Australia Cotton Annual

Cotton Australia annually collates data for key areas affecting cotton production in Australia: crop size, area, forecasts, yield, quality, price, water, biotechnology, environmental indicators and the world market.

Unless stated otherwise, the numbers quoted in this booklet relate to the 2013-14 Australian cotton crop. Sources and references are identified at the back of the booklet.

For more information, statistics and facts please visit www.cottonaustralia.com.au

Cotton Australia is the peak representative body for Australia’s almost 1,250 cotton farmers.
Crop Size 2014-15 season forecast
(hectares and bales as at February 2015)

1.9 million bales (estimated)
196,698 hectares
53% compared to the 2013-14 planted area

Number of Cotton Farms

796
64% in NSW and 36% in Queensland
32% down from last season (1181) due to reduced water availability
Average area of cotton on a farm

495 hectares
(five-year average, 2009-14)

On average, cotton makes up 14% of land on a farm

Contribution to the regional Australian workforce

The average cotton farm provides jobs for 6.6 people

In a non-drought year, the Australian cotton industry employs up to 10,000 people
Cotton is grown in regional communities across NSW and Queensland.
63% of the crop was grown in NSW

37% of the crop was grown in Queensland

7% of the crop was rain grown (dryland)

93% was irrigated
Australian yields are high by international standards, almost three times the world average.

**Yields this Season**

- Overall average yield: 9.95 bales/hectare
- Dryland cotton yield: 4.2 bales/hectare

**Farm Gate Value**

- The 2013/14 Australian cotton crop was worth $2.2 billion
- Value of cotton lint: $1.9 billion
- Value of cottonseed: $300,000

(seed and lint)
of Australia’s cotton crop met the base grade, with less than 5% of the crop attracting a discount on the world market.

was graded as premium or high quality (above base grade), attracting a higher price on the world market.
In 2014-2015, world cotton production was approximately **115.5 million bales**

In 2014-2015, world cotton consumption was approximately **107.4 million bales**

Australia is the third largest exporter in the world (behind USA and India)

Over **99%** of Australia’s raw cotton is exported, with **66%** sold to China

Australia’s place in the world cotton market

**AUSTRALIAN RAW COTTON EXPORTS IN 2013 (KG)**

(source: ABARES)

- China – 734,063,840
- Indonesia – 82,931,089
- Thailand – 77,921,589
- Korea, Republic of – 58,991,867
- Bangladesh – 49,603,991
- Vietnam – 38,151,484
- Pakistan – 21,976,974
- Japan – 15,414,854
- Malaysia – 10,142,504
- India – 9,444,840
- Hong Kong – 6,997,322
- Taiwan – 3,579,836
- Philippines – 2,006,923
- Italy – 695,000
- Other – 401,801
- TOTAL – 1,112,521,33
Area planted using biotechnology

99% of Australia’s cotton crop is grown with varieties containing biotech traits

Insect Pest Control

Comparing five year averages for the periods 2008-13 and 1998-2003, the Australian cotton industry has achieved an 89% reduction in insecticide use.
% of catchment used to grow cotton

<5%

Cotton crops occupy less than 5% of the catchment areas in which they operate

% of native vegetation on cotton farms

42%

Of an average cotton farm’s area is dedicated to native vegetation
Land Use Efficiency

Cotton crop water requirements

Cotton’s average irrigation requirement is 7.8 megalitres per hectare.

This compares to:

- Rice (12.6 ML/ha)
- Fruit and Nut Trees (5.6 ML/ha)
- Cut Flowers and Turf (4.9 ML/ha)

In Australia:

30% less land is now required to produce one tonne of cotton lint compared to 1999.

Compared to the rest of the world, it takes a third of the land to produce one metric tonne of cotton fibre in Australia.
Water use efficiency – improvements

The Australian cotton industry has achieved a 40% increase in water productivity since 2003. In other words, 40% less water is now needed to grow one tonne of cotton lint, compared to 2003.

Australian cotton growers have almost doubled their irrigation water use index from 1.1 bales/megalitre in 2000-01 to 1.9 bales/megalitre in 2009-10.

WATER USE (ML) PER TONNE OF COTTON

2003 2004 2005 2006 2007 2008 2009 2010 2011

0.0 0.5 1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5
Cotton’s total water use

In 2013-14, the largest area of irrigated land in Australia was pasture and cereal crops used for grazing (or fed off), which accounted for

714,503.2 hectares or 30% of the total area irrigated

The largest volume of irrigation water was applied to cotton, which used

2,851 gigalitres or 26% of the national irrigation total for the year (11,060 gigalitres)

SOURCES

PAGE 4
Bales: Cotton Australia
[compilation of industry sources]
Hectares: Monsanto audited numbers, 23.12.14

PAGE 5
Monsanto audited numbers, 23.12.14

PAGE 6
Australian Grown Cotton Sustainability Report 2014

PAGE 7
Australian Grown Cotton Sustainability Report

PAGE 8
Towns list, Cotton Australia database

PAGE 9
Cotton Australia tables [compilation of industry sources]

PAGE 10
Cotton Australia tables [compilation of industry sources]

PAGE 11
Cotton Australia tables [compilation of industry sources], ABARES Crop Report, December 2013

PAGE 12
Cotton Australia tables [compilation of industry sources]. Dryland yield calculated by dividing bales by paddock hectares [not green hectares], ABARES

PAGE 13
Cotton Australia tables [compilation of industry sources], ABARES

PAGE 14
Cotton Compass

PAGE 15
Australian Cotton Shippers Association

PAGE 16
ICAC (data in metric tonnes converted to Australian bales by multiplying the tonne number by 4.4 – x4 227kg bales in a metric tonne)

PAGE 17
ABARES, Australian Cotton Shippers Association

PAGE 18
Monsanto audited numbers, 23.12.14

PAGE 19
Australian Grown Cotton Sustainability Report 2014

PAGE 20
Australian Cotton Water Story 2012

PAGE 21
Australian Grown Cotton Sustainability Report 2014

PAGE 22
2011 Cotton Grower Survey (CRDC and Cotton CRC)

PAGE 23
ABS 2012-13

PAGE 24
Australian Cotton Water Story 2012

PAGE 25
ABS 2014

PAGE 26
ABS 2014