

Global Perspectives in Cotton Production



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Cotton Incorporated

Outline

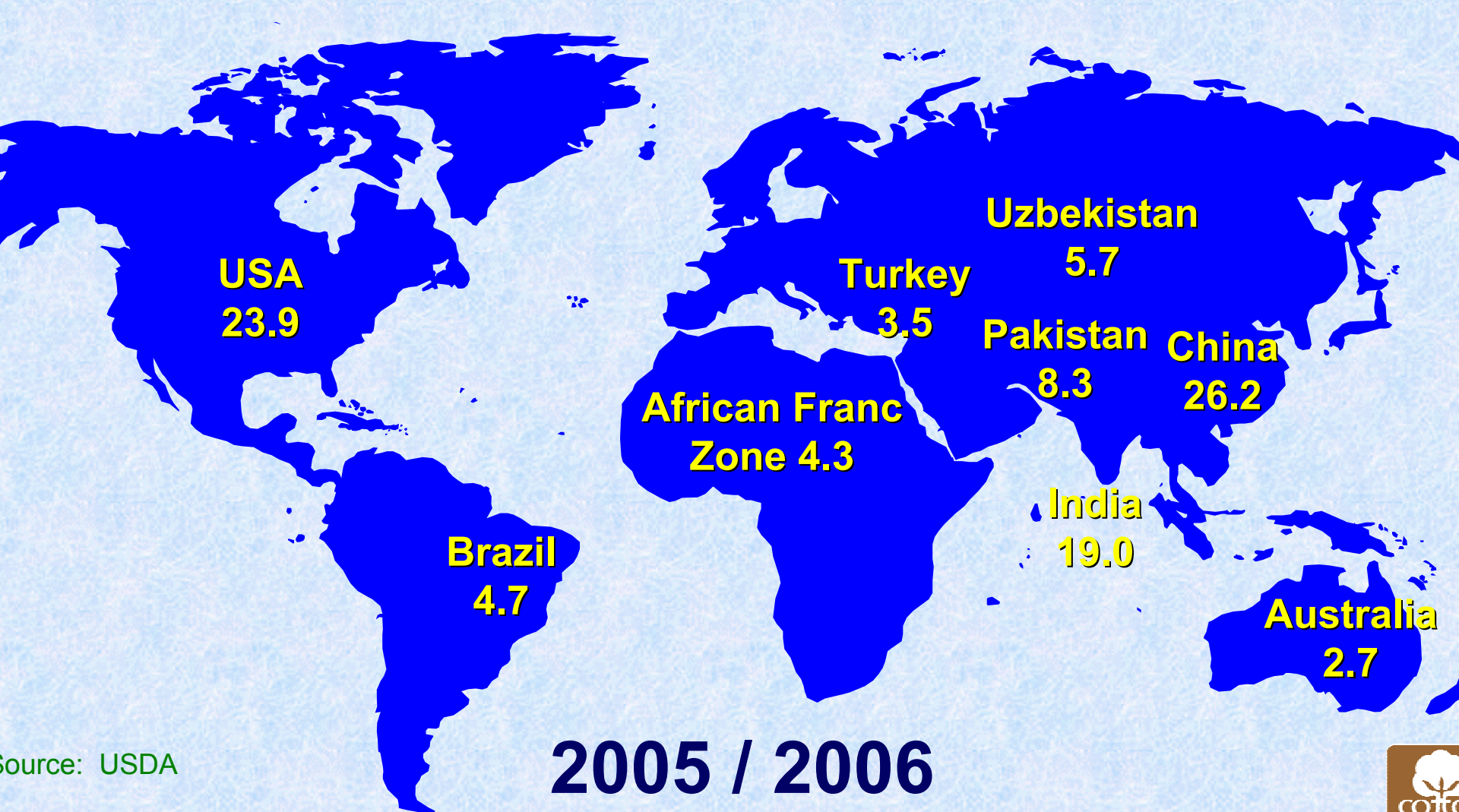
- ✓ **Production**
- ✓ **Pest Management**
- ✓ **Production Costs**

World Cotton Production

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- A world map with a grid overlay. Countries that produce cotton are shaded in orange. These include the United States, Mexico, Central America, the Caribbean, West and Central Africa, India, China, Uzbekistan, Turkmenistan, Kyrgyzstan, and Australia. Other countries are shaded in light green.
- **81 countries grow cotton**
 - **75% production in 5 countries**
 - **114 million bales in 2005 /2006**
 - **25 billion pairs men's denim jeans**

Major Cotton Producers

Millions of 480-lb. bales

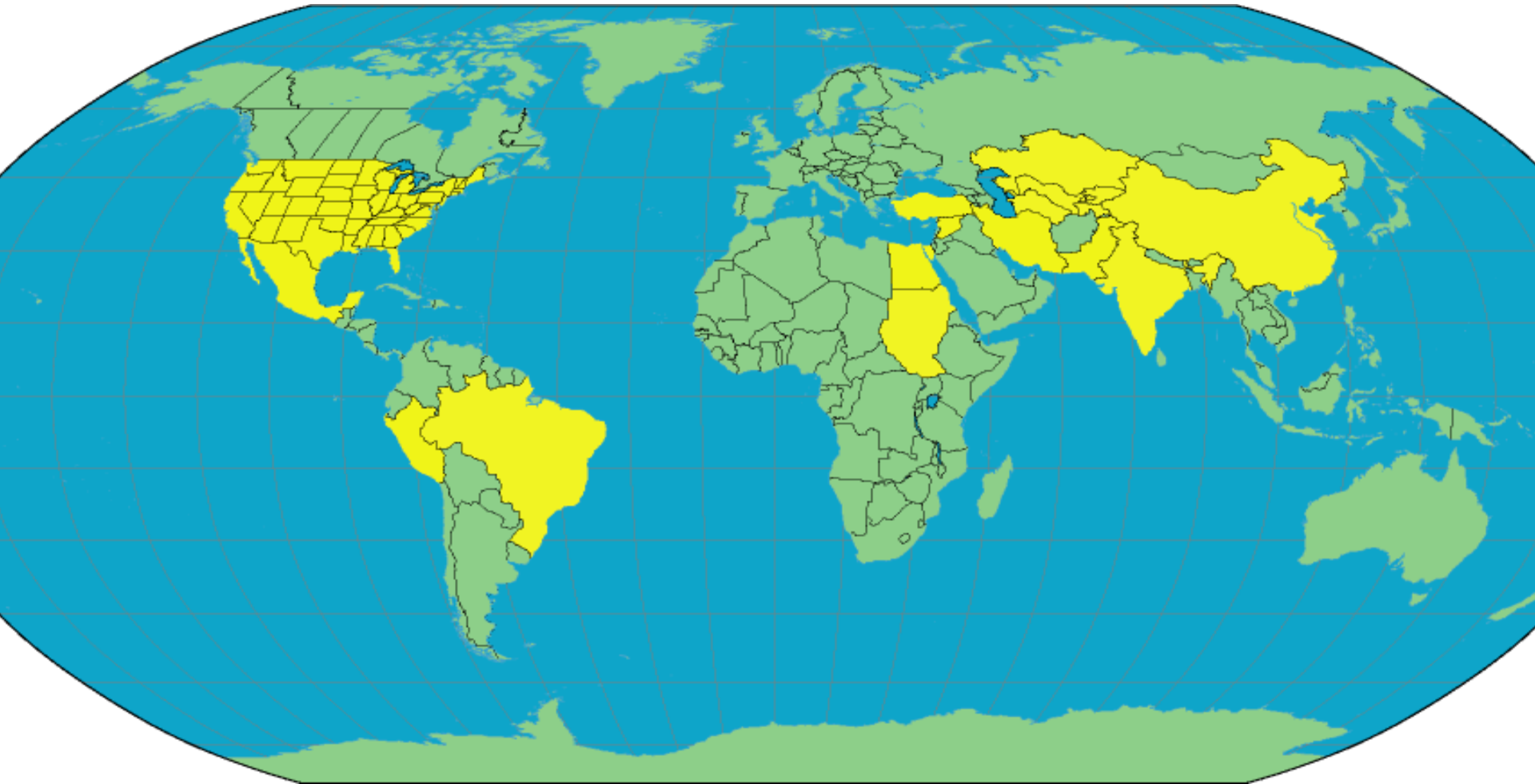


Source: USDA

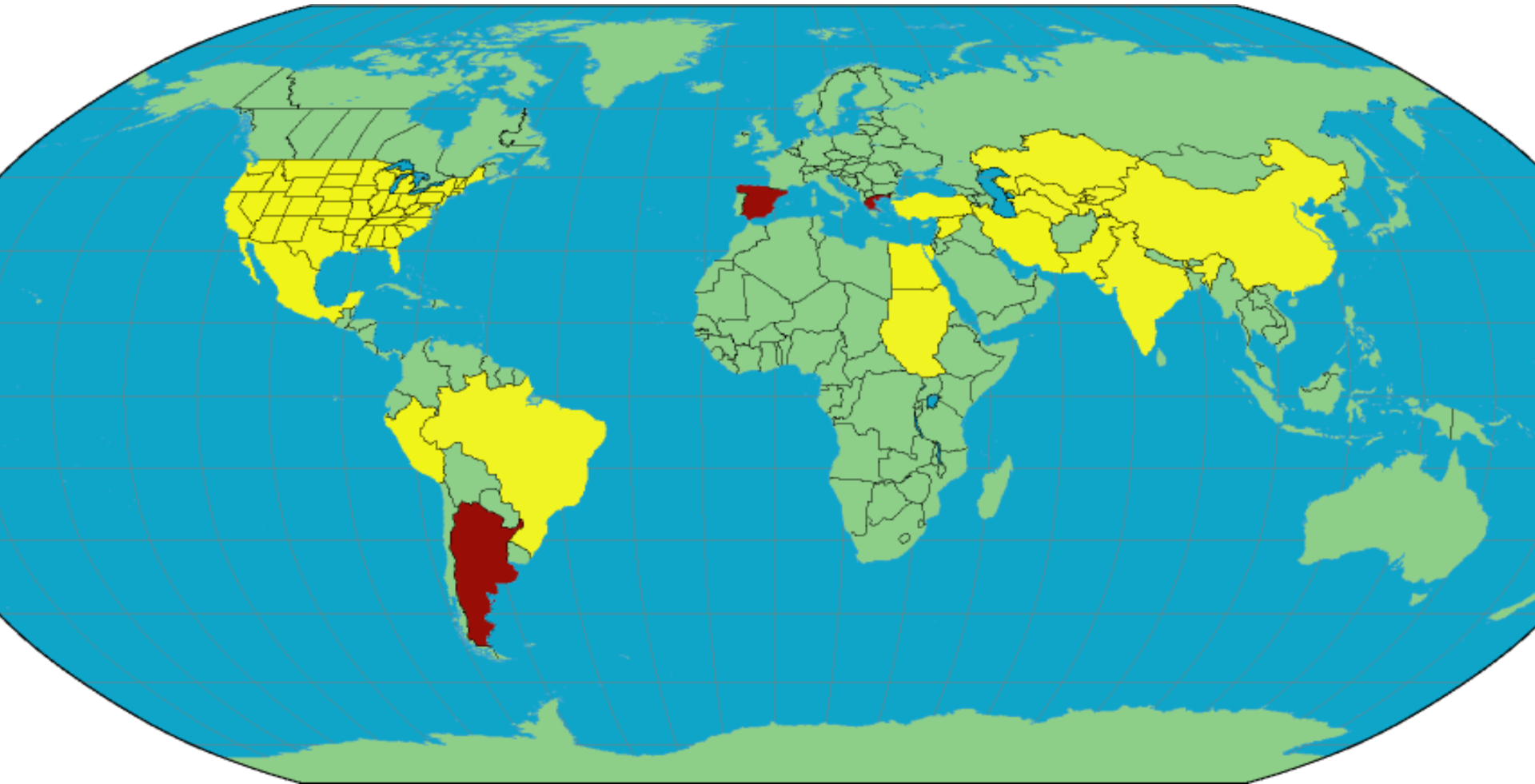
2005 / 2006



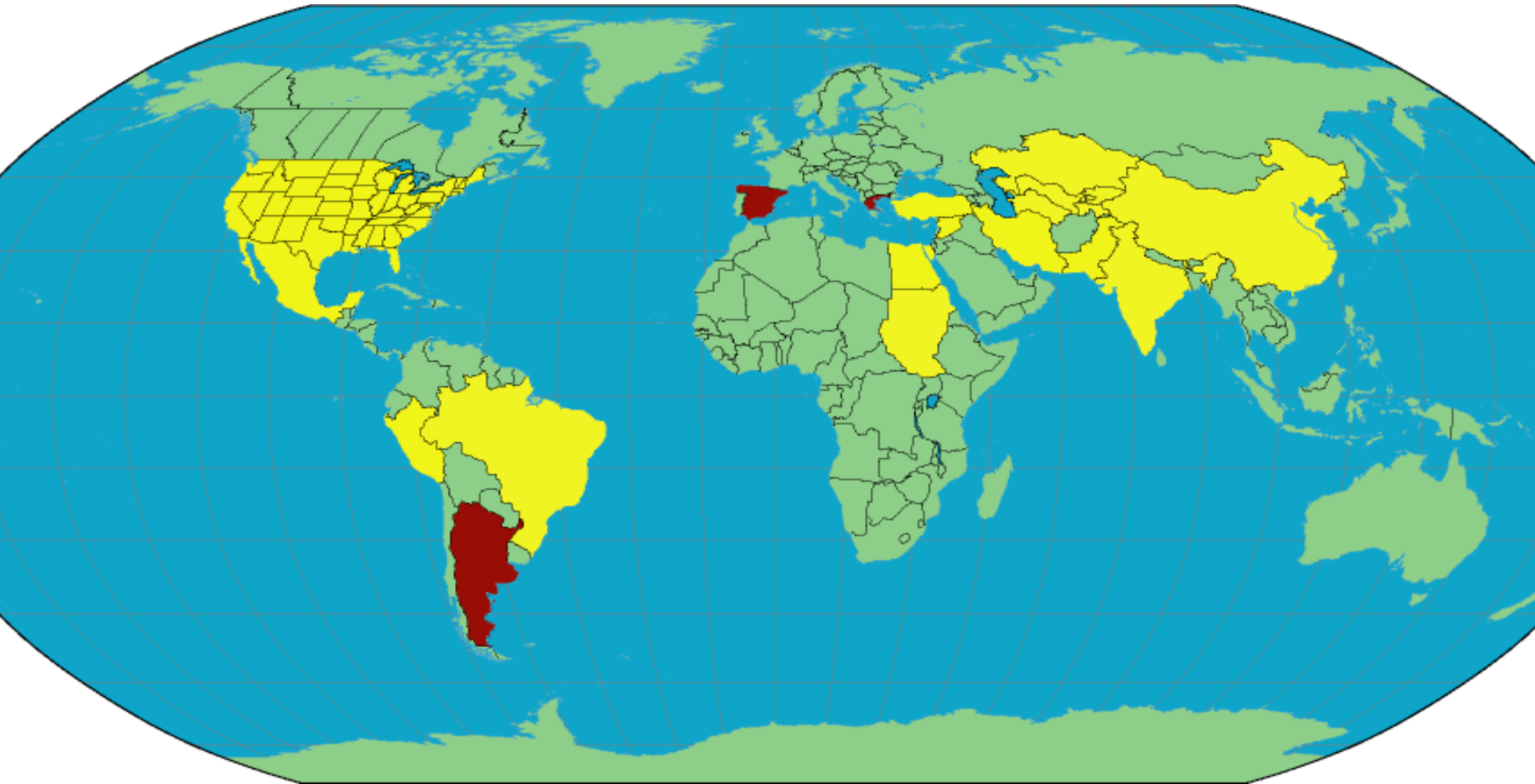
Leading Cotton Producers 90% of World Production in 1961



Leading Cotton Producers 90% of World Production in 1971

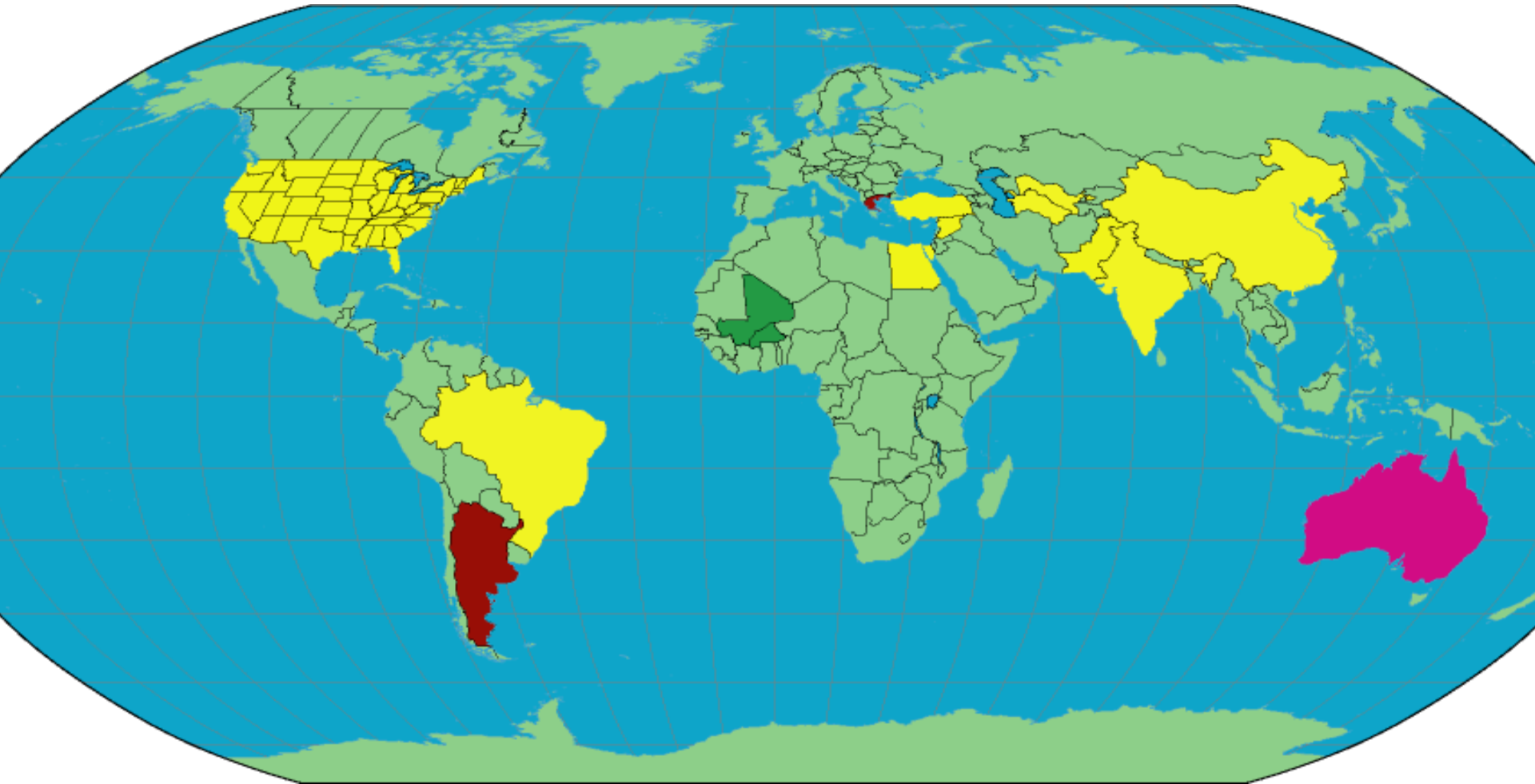


Leading Cotton Producers 90% of World Production in 1981



Leading Cotton Producers

90% of World Production in 2001



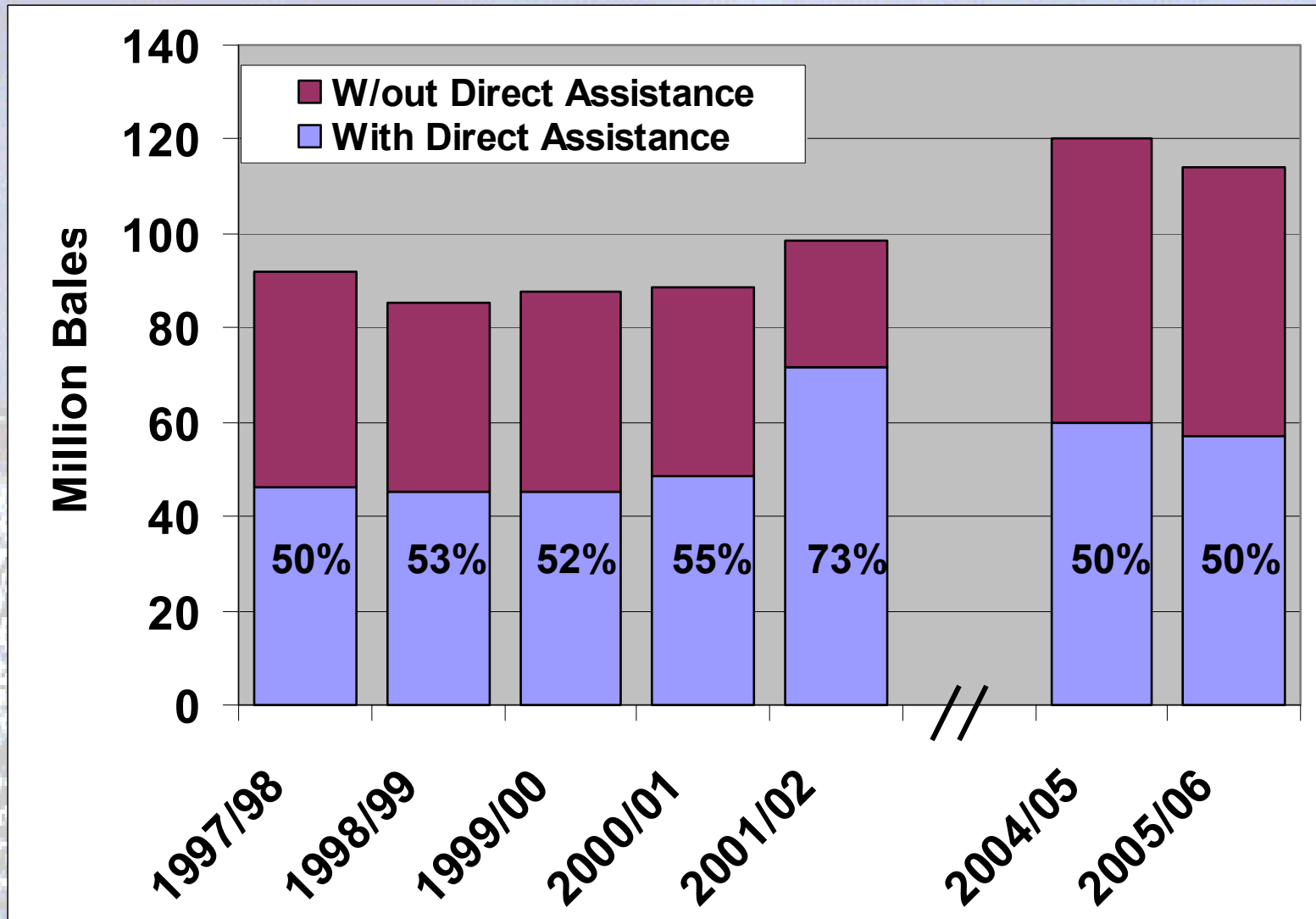
Cotton Production Area & Yield 2005 / 2006

Country	Area (1000 ac)	Country	Yield (lb/ac)
1 India	21,810	1 Australia	1,696
2 USA	13,797	2 Israel	1,559
3 China	12,498	3 Syria	1,298
4 Pakistan	7,734	4 Spain	1,155
5 Uzbekistan	3,537	5 Turkey	1,152
6 Brazil	2,038	6 Brazil	1,109
7 Turkmenistan	1,729	7 Greece	1,084
8 Burkina	1,556	8 China	1,008
9 Turkey	1,482	9 Mexico	982
10 Mali	1,383	10 USA	833
Subtotal (79%)	67,488		
Other	17,722		
World Total	85,210	World Avg	701

Source: USDA



Government Assistance Programs



Government Assistance Programs 2005 / 2006*

Country	Production (000 Bales)	Avg/lb (US Cents)	Total (Million US\$)
USA	23,890	17	1,947
China	26,200	16	2,039
Greece	1,975	75	712
Spain	510	81	196
Turkey	3,550	4	69
Colombia	220	21	21
Mexico	635	5	17
All Countries	56,980	31	5,000
Income & price support only			

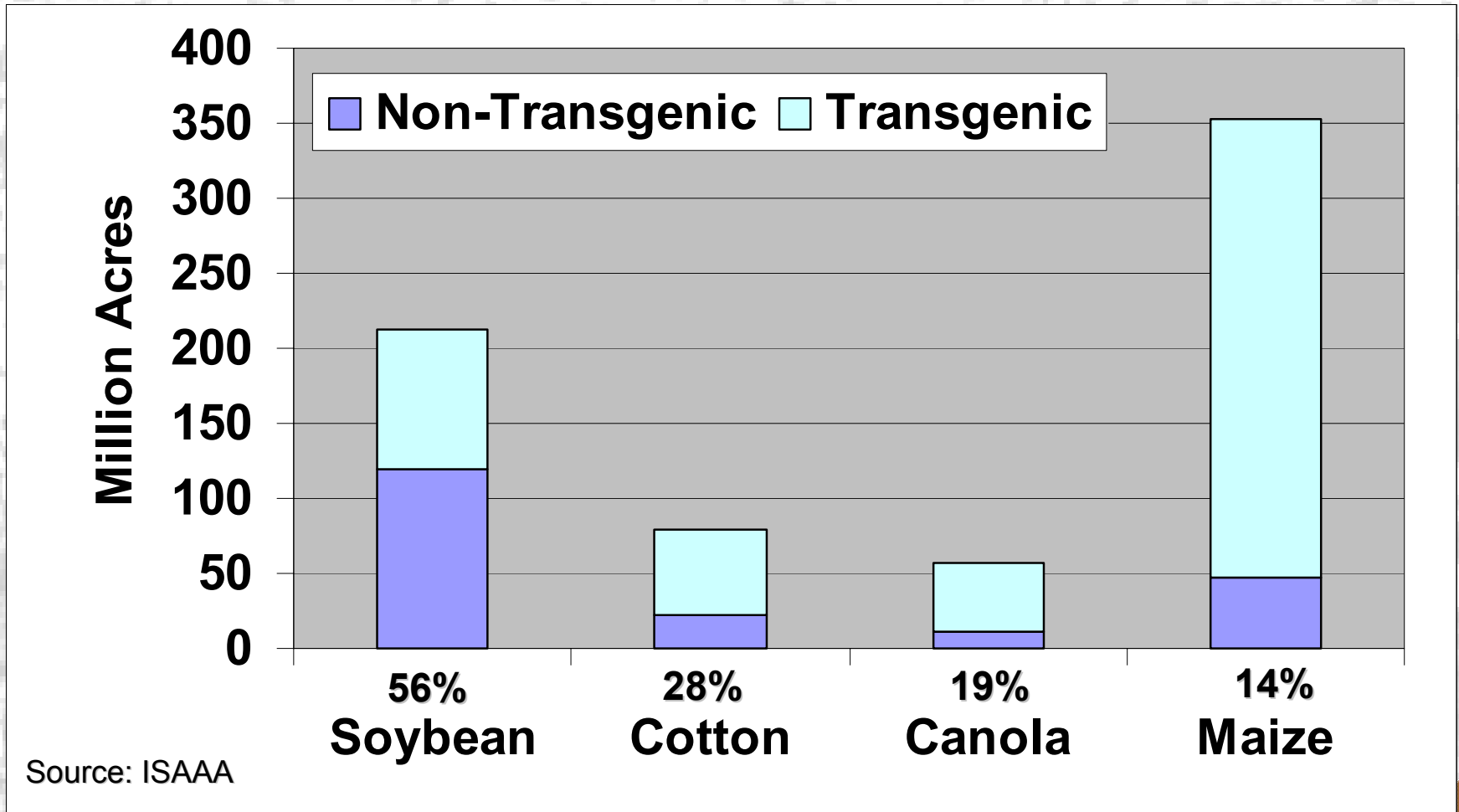
Source: ICAC
preliminary



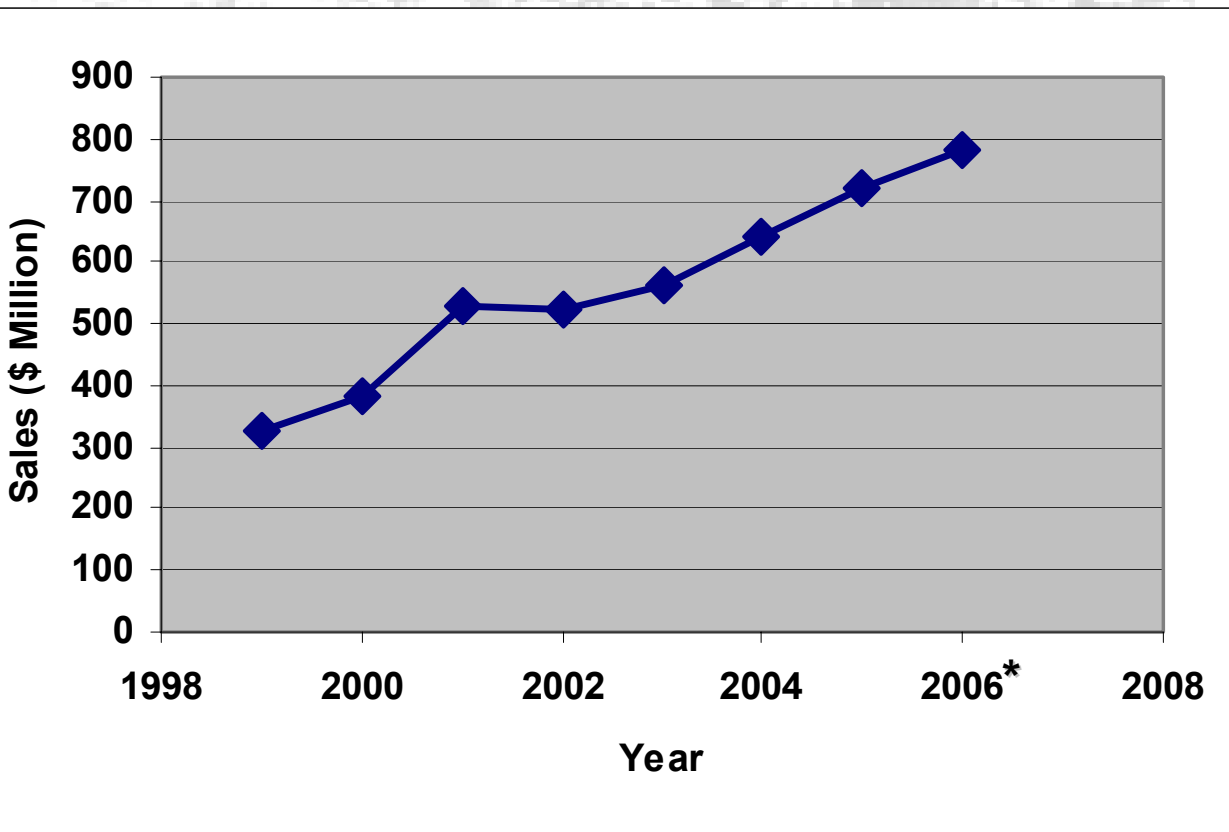
Outline

- ✓ Production
- ✓ **Pest Management**
- ✓ Production Costs

Global Adoption of Major Transgenic Crops 2004



Global Adoption of Transgenic Cotton



Prediction

Sources: Cropnosis Limited; ICAC

2004 / 2005

- USA
- Argentina
- Brazil
- India (Hybrids)
- China
- South Africa
- Australia
- Mexico
- Colombia
- Indonesia



Top Ranking Insect Pests – 2004 / 2005

Pest	Australia	Brazil	China	Greece	India	Pakistan	Syria	Turkey	Uzbekistan	USA
American Bollworm	1		1	X	1	X	1		1	
Pink Bollworm				1	X	X	X			
Bollworm/Budworm		X								1
Australian Budworm	X									
Other Bollworms					X	X	X			
Lygus spp.										X
Cotton Aphid								X	X	
Silverleaf Whitefly			X							
Stink Bug spp.										X
Mirid Spp.	X									
Cotton Leafworm		X								
Thrips			X					1		
Mite spp.		1		X				X	X	

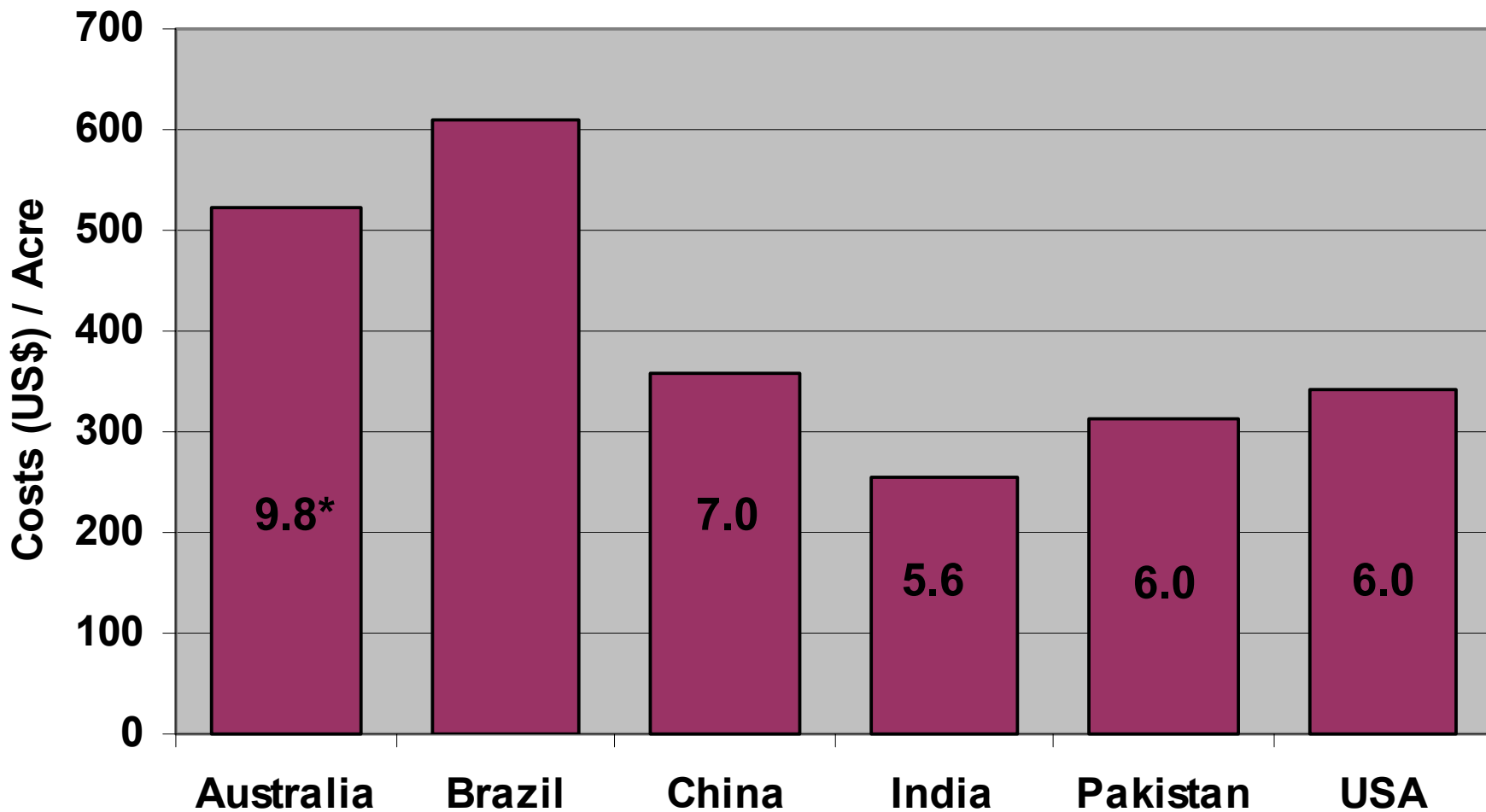
Sources: ICAC; National Cotton Council

87% world production represented



Insect Control Cost per Acre

2003 / 2004



* Avg. sprays/yr

Source: ICAC

76% world production represented



Top Ranking Weed Pests – 2004 / 2005

Weed	Australia	Brazil	China	Greece	India	Pakistan	Syria	Turkey	Uzbekistan	USA
Grass Weeds										
Purple Nutsedge	X					X				
Burmudagrass				X	X		X		X	
Crabgrass										X
Shepherds Purse			X							
Johnson Grass								X		
Sandbur spp.		X								
Broadleaf Weeds										
Cocklebur spp.							X	X		
Lambsquarter					X	X				
Black Nightshade				X						
Pigweed									X	X
Hairy Beggarticks		X								
Velvetleaf			X							
Mallow	X									

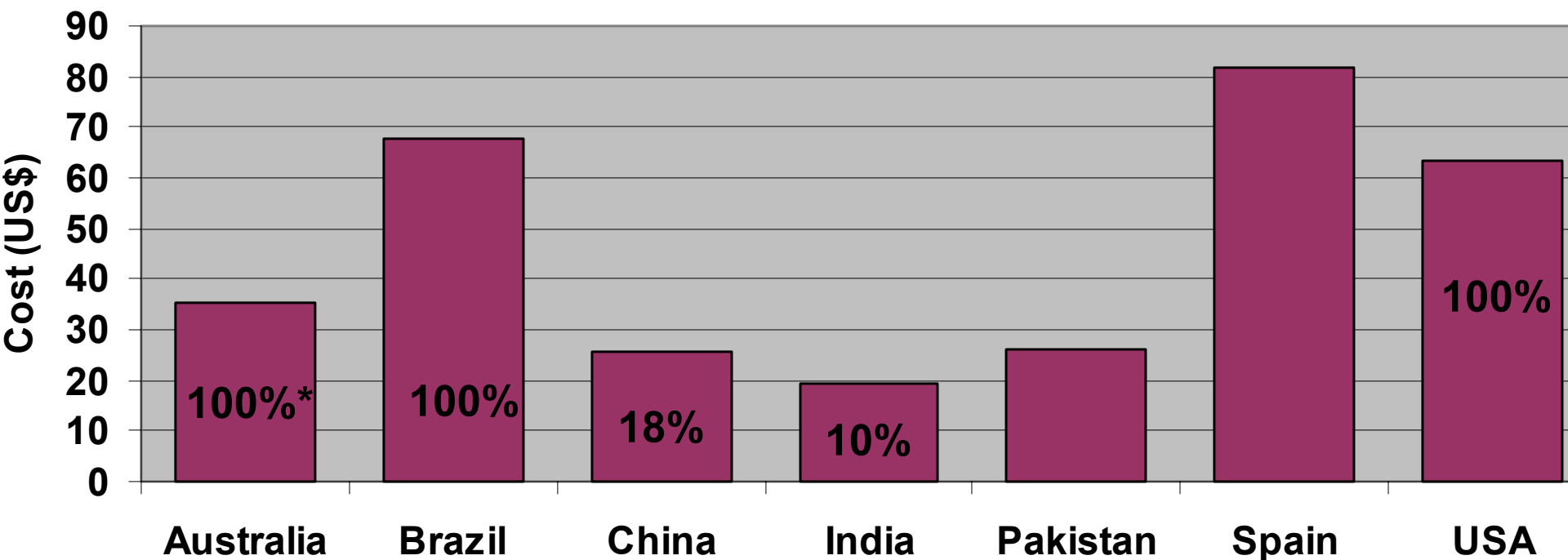
Sources: ICAC

87% world production represented



Weed Control Cost per Acre

2003 / 2004



% Acres

Source: ICAC; Shurley et al

76% world production represented



Top Ranking Diseases – 2004 / 2005

Disease	Australia	Brazil	China	Greece	India	Pakistan	Syria	Turkey	Uzbekistan	USA
Verticillium Wilt				X				X		
Seedling Diseases			X							
Bacterial Blight					X					
Cotton Leaf Curl Virus						X				
Nematode spp.										X
Black Root Rot	X									
Blue dis		X								

Sources: ICAC

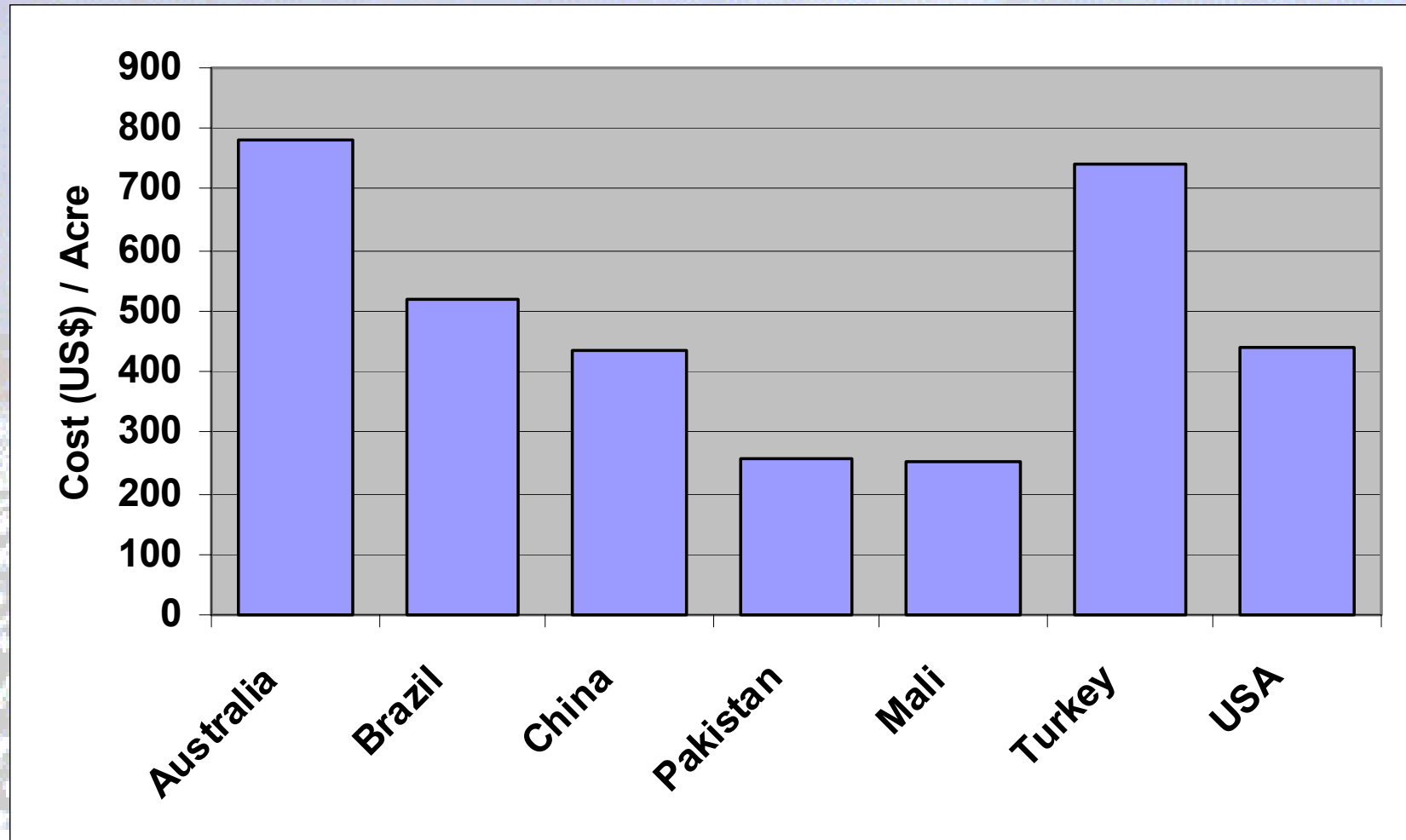
87% world production represented

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Cost of Producing One Acre of Cotton

2003 / 2004



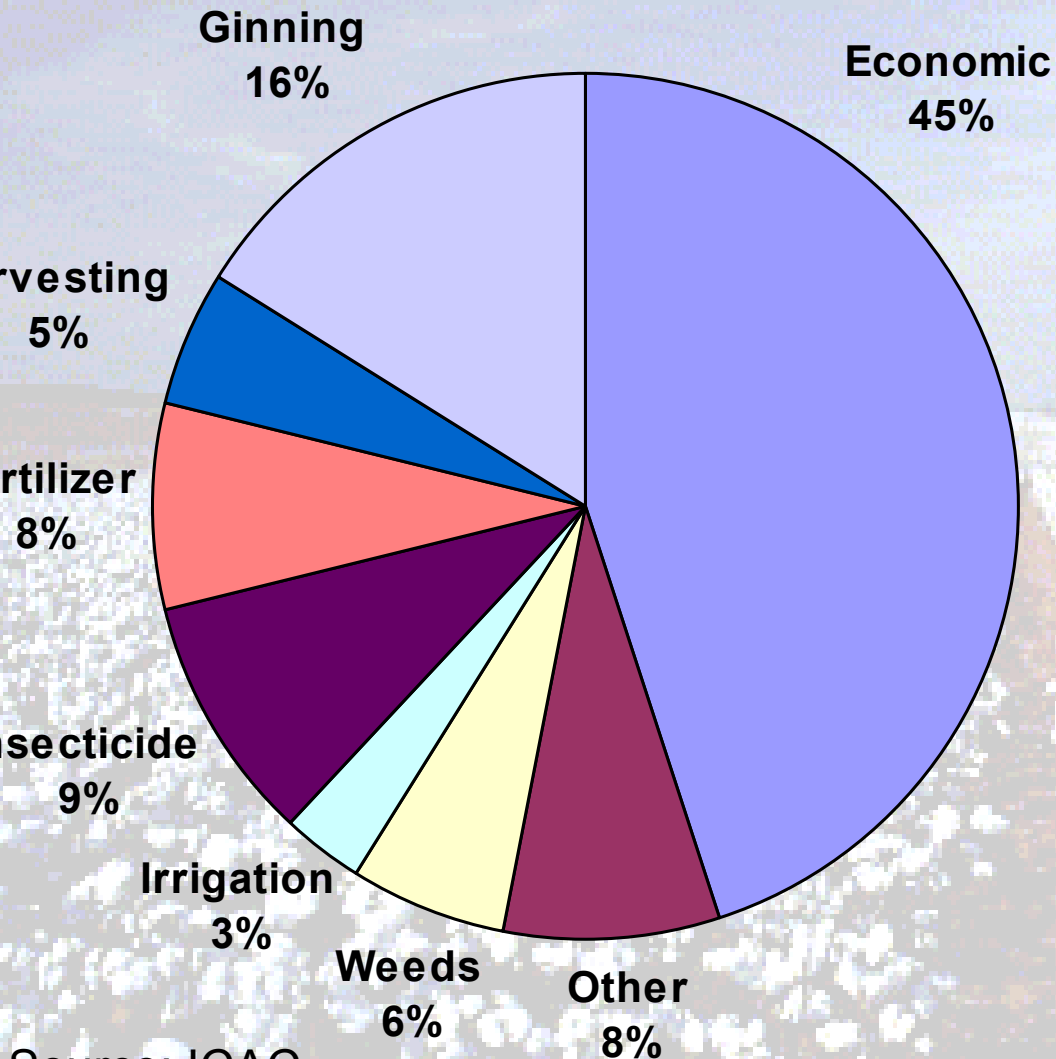
Source: ICAC

66% world production represented



Cost Structure

Australia 2003 / 2004



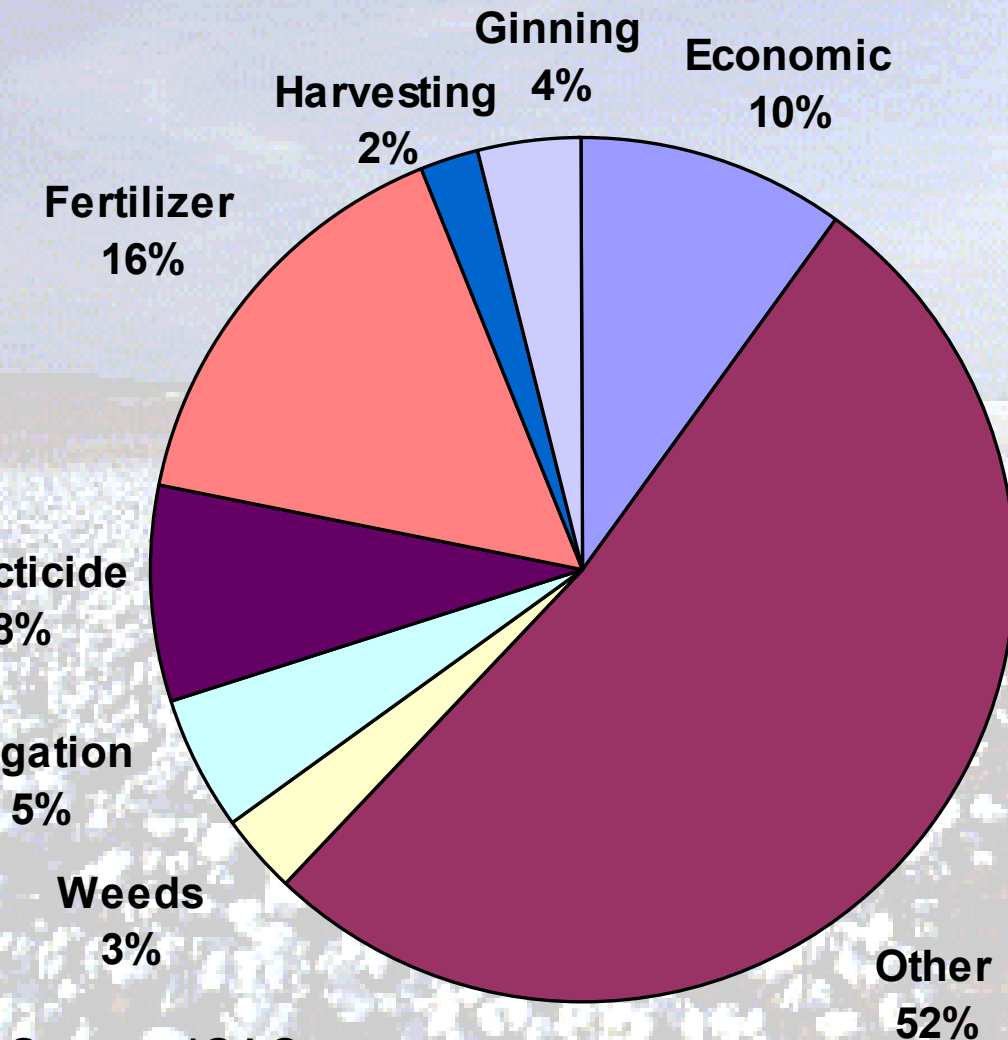
Production	1.7 M Bal
Yield	1,517 lb/a
Acreage	484,000
Cost / Ac	\$784
Avg. Farm Size	1,122 ac
% Irrigated	83
Hand Weeding	None
% Hand Harvested	None

Source: ICAC



Cost Structure

China 2003 / 2004



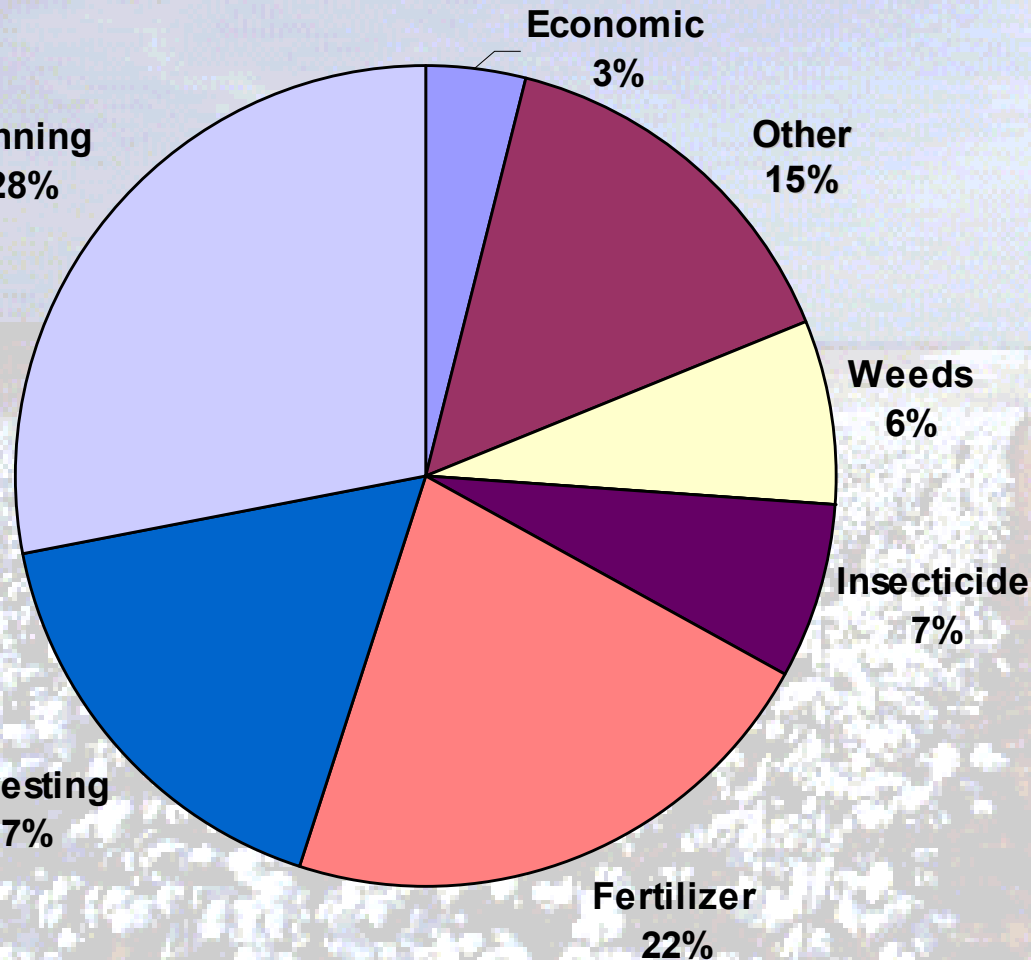
Production	22.3M Ba
Yield	1,062 lb/ac
Acreage	12.6 M
Cost / Ac	\$517
Avg. Farm Size	7.4 ac
% Irrigated	100
Hand Weeding	Yes
% Hand Harvested	100

Source: ICAC



Cost Structure

Mali 2003 / 2004



Land
28%

Economic
3%

Other
15%

Weeds
6%

Insecticide
7%

Fertilizer
22%

Source: ICAC

Production 1,1 M Bale

Yield 424 lb/ac

Acreage 1.8 M

Cost / Ac \$254

Avg. Farm Size 13.0 ac

% Irrigated None

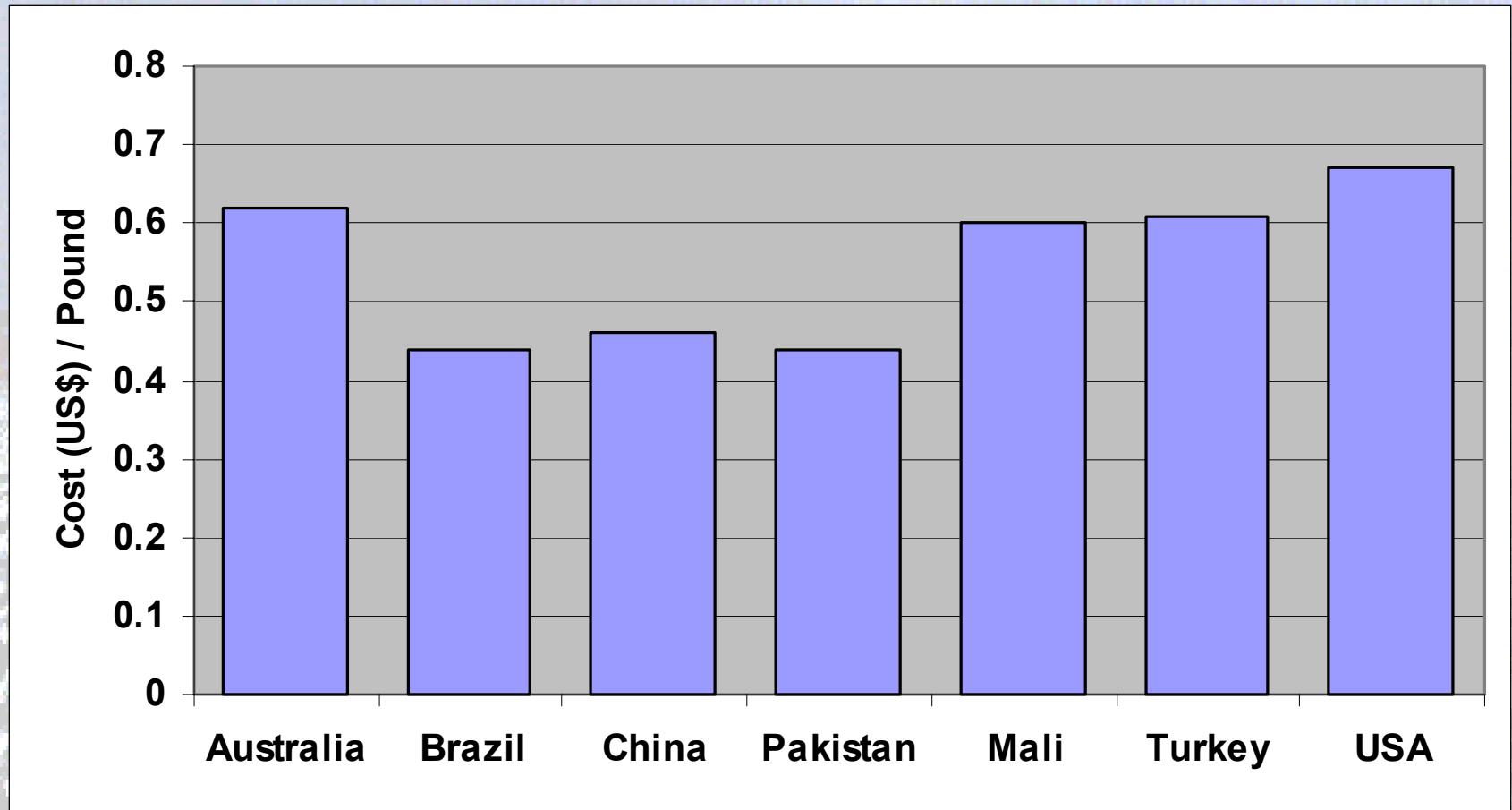
Hand Weeding Yes

% Hand Harvested 100



Cost of Producing One Pound of Cotton

2003 / 2004



Source: ICAC

66% world production represented





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