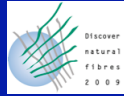


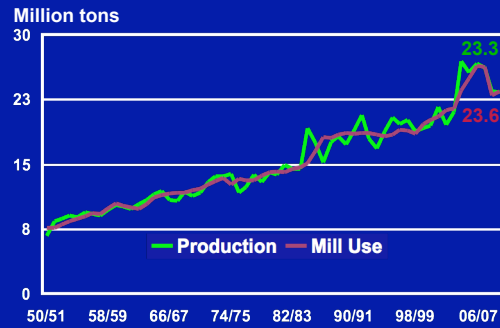
## GLOBAL CONTEXT OF COTTON PRODUCTION



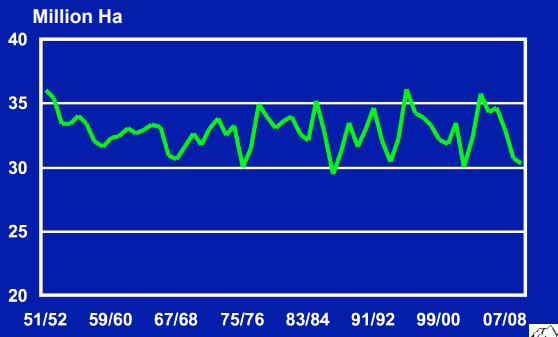
M. Rafiq Chaudhry  
Technical Information Section

International Cotton Advisory Committee

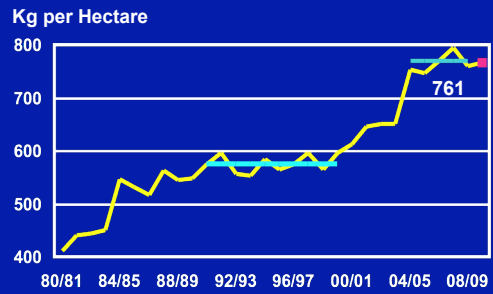
## WORLD PRODUCTION AND MILL USE



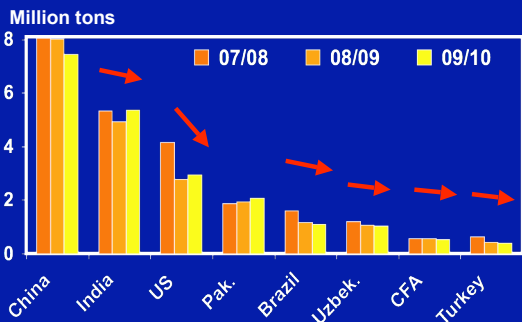
## WORLD COTTON AREA



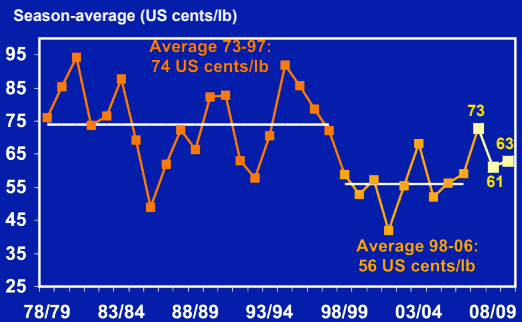
## WORLD COTTON YIELDS



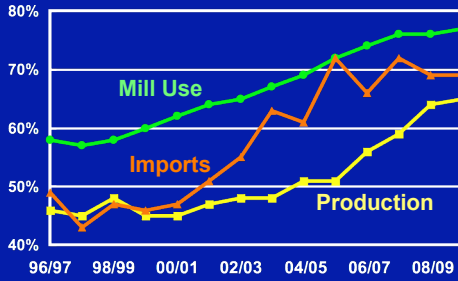
## COTTON PRODUCTION



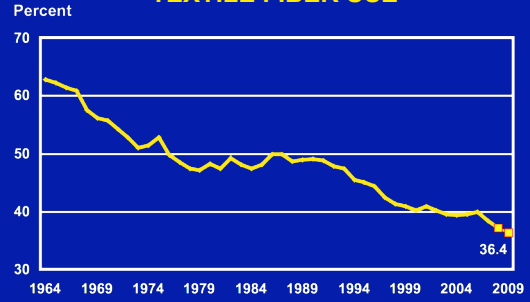
## SEASON AVERAGE COTLOOK A INDEX



### SHARE OF ASIA IN THE WORLD TOTAL



### COTTON'S SHARE IN WORLD TEXTILE FIBER USE



### PLANT PROTECTION CHEMICAL USE WORLD - 2008

All chemicals	= US\$44 billion
Herbicides	= 47%
Insecticides	= 24%
Fungicides	= 24%
Others	= 5%

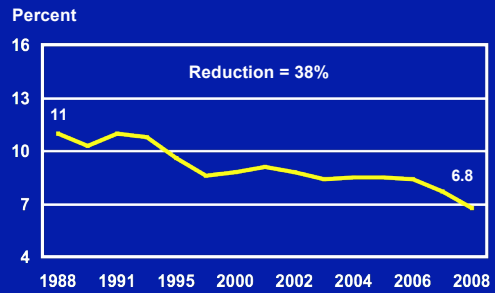
### PLANT PROTECTION CHEMICAL USE COTTON - 2008

Total	= US\$ 3 billion
	= 6.8%
Herbicides	5%
Insecticides	16%

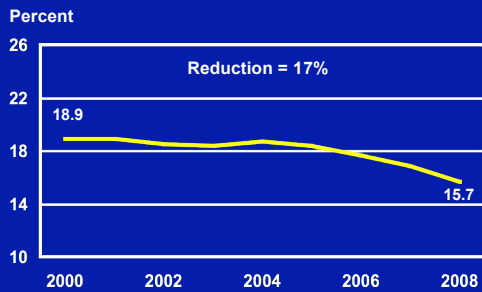
### PLANT PROTECTION CHEMICAL USE COTTON - 2008

Total	= US\$ 3 billion
	= 6.8%
Herbicides	5%
Insecticides	16%

### SHARE OF PESTICIDES - COTTON



## SHARE OF INSECTICIDES - COTTON



## LOWER CHEMICAL USE - FACTORS

1. Countries suffered
2. Consequences are better understood
3. Chemicals are expensive - cost of production

## LOWER CHEMICAL USE - FACTORS

1. Countries suffered
2. Consequences are better understood
3. Chemicals are expensive - cost of production
4. Insecticides are dangerous
5. Not a long-term solution
6. Confidence in non-chemical controls increased

## CHEMICAL USE IN COTTON - FUTURE

1. Weed control - No alternatives to herbicide use
2. Insect control - Many options
  - Cultural
  - Biological
  - Biotech
  - Special techniques

## CHEMICAL USE IN COTTON - TARGET

No insecticides

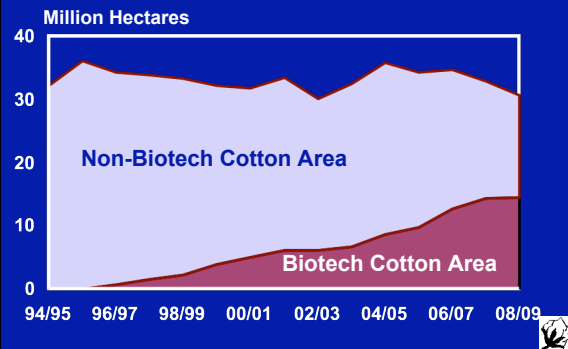
## FIBER QUALITY - ISSUES

1. Contamination  
(Plastic, polypropylene, etc)
2. Instrument testing  
(High volume instrument)

## FIBER QUALITY - Rapid Testing Instruments

Uster	= 2,200
Europe	= 10%
Asia	= 54%
Africa	= 12%
N. America	= 16%
S. America	= 8%
Premier	= 400
(China, India, Pakistan, Brazil)	

## BIOTECH & NON-BIOTECH COTTON AREA



## BIOTECH COTTON - 2008/09

Area	= 48%
Production	= 54%
Trade	= 52%

## BIOTECH COTTON - FUTURE

1. Fertilizer efficient
2. Higher yield
3. Gossypol free
4. Better quality
5. Higher yield
6. More insect control
7. Global cotton

## MAJOR CHANGES - FUTURE

1. Insect control
2. Breeding for new varieties
3. Instrument testing
4. Biotechnology will dominate

## ORGANIC COTTON

1. Producer driven initiative
2. Truthful labeling
3. More transparent
4. World cotton supply and use

## **ORGANIC COTTON - SUGGESTIONS**

1. Biotech cotton for certification - trait specific approval
2. Organic and conventional cotton can co-exist
3. Involvement of governments