

Final analysis of the 2002 Australian crop

By Craig Muller, Director ACSA

The final quality results for the 2002 Australian crop showed a very high standard. Most quality parameters of Australian cotton over the past four years have shown improvement every season. Unfortunately, high micronaire is one quality parameter that has increased significantly in the past two years.

This year the Australian Cotton Shippers Association (ACSA) decided to list the qualities for the final report in a slightly different format to previous reports and has added:

- 21 colour, three leaf; and,
- 21 colour, two leaf and better, as two separate grade parameters for the report.

What does this mean?

In past reports the ACSA has listed base grade and better, but, due to the qualities improving we thought it imperative that we

reflect this in the report. This information allows growers as well as mill consumers to better interpret the increasing standard of Australian cotton.

FIGURE 1: GRADE

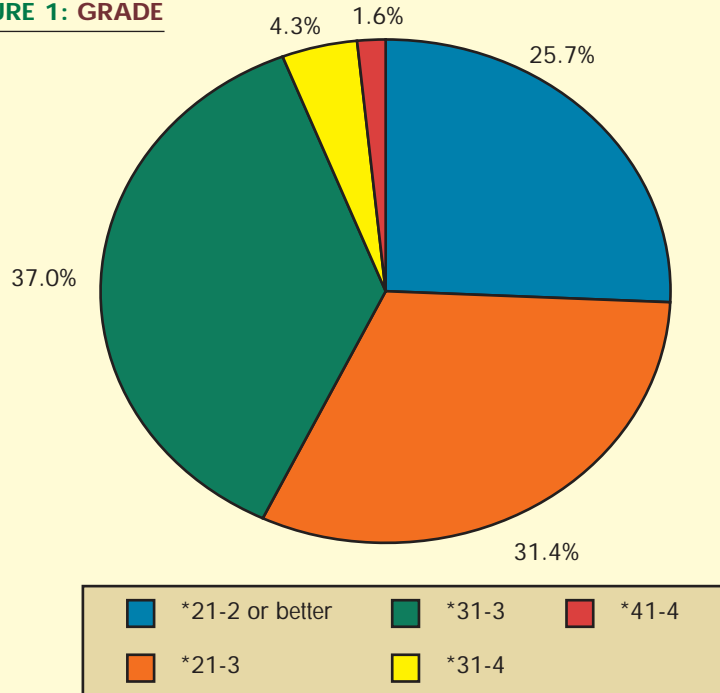
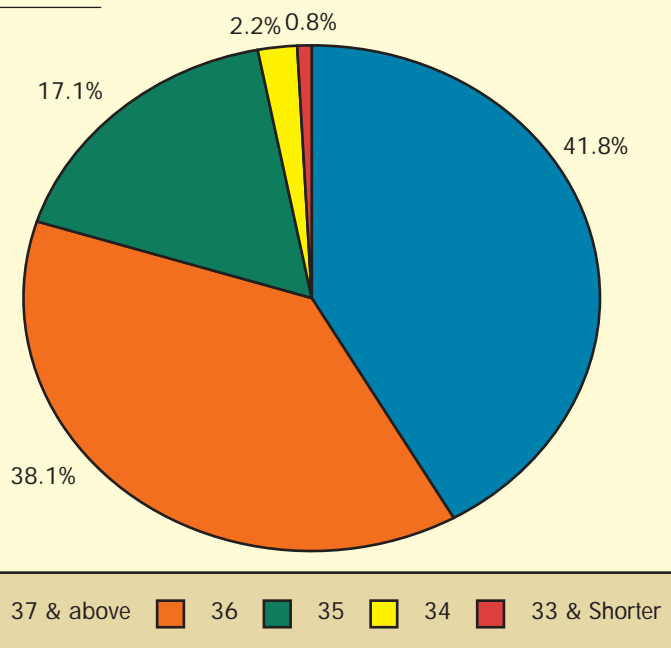


FIGURE 2: STAPLE



Grade

The final classing statistics show that more than 94 per cent of the Australian cotton crop was base grade (31-3; 35; G5) and better for 2002 (Figure 1). This is an increase of more than nine per cent over the previous crop and a sharp increase of some 25 per cent on the 1999 and 2000 crops. Even more impressive is the fact that 57 per cent of the crop classed 21-3 and better.

Staple

Almost 80 per cent of the 2002 crop was 36 staple (1 1/8 inch) and longer (Figure 2). This is a slight increase on the 2001 crop and a good result, especially given the difficulties in selling high-grade cotton shorter than 36 staple.

Micronaire

Micronaire of the 2002 crop was on the high side of G5 (3.5-4.9), with more than 95 per cent of the crop recording 3.8 or higher (Figure 3). Fortunately, this figure was a reduction of three per cent compared to the previous crop. But it does highlight that we do have a micronaire problem with some varieties.

Strength

Strength of Australian cotton continues to be of a high standard with more than 57 per cent of the crop above 30 grams per tex (Figure 4). While this is lower than the previous crop (65 per cent) it is excellent news as it is one parameter in which mills are showing an increasing awareness.

SJV cotton (a US growth that competes with Australian high grades) has out-performed Australian cotton in strength in the past and has usually attracted at least a 200 point premium. The strength results over the past few years will ensure that Australia remains competitive with SJV.

Uniformity

As we have come to expect, uniformity was consistent with previous seasons with more than 92 per cent of the crop above 80 per cent uniformity (Figure 5).

These statistics show that Australian cotton is certainly among the best quality cotton produced in the world. But as competing countries continue to improve farming practices and plant similar varieties to Australian cotton (and in some cases plant Australian varieties) they will eventually start matching it with the best we can produce.

In summary, 2002 was another good result, but we must continue to assess ways of improving standards. As shippers of Australian cotton, ACSA cannot stress enough the importance of maintaining

high-grade quality with zero tolerance on contamination.

Stronger and longer fibre is the key for success of Australian cotton for the future and we, as an industry, need to lift the benchmark in all facets of quality through best management practices. Australian cotton normally attracts strong demand from Far East spinning mills and the industry needs to continue to improve standards to guarantee market share.

The 2003 crop has had its share of challenges it will be significantly smaller than in recent years.

While shippers are watching closely for possible fibre stress and maturity problems as they plan their 2003 sales programs, ACSA wishes all producers a productive harvest. Going on early reports, we may be in for some surprises on yields for 2003!

FIGURE 3: MICRONAIRE

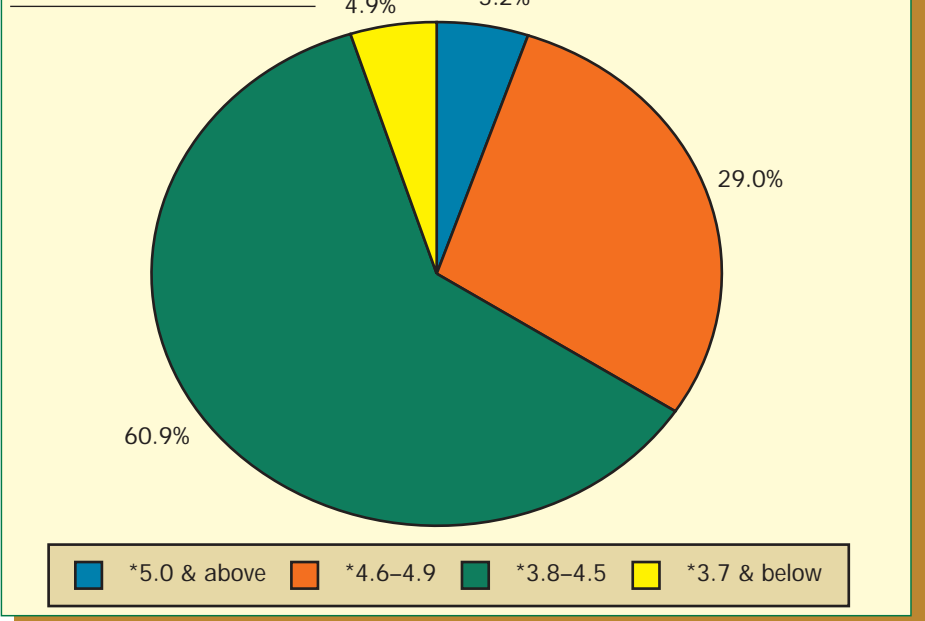


FIGURE 4: STRENGTH

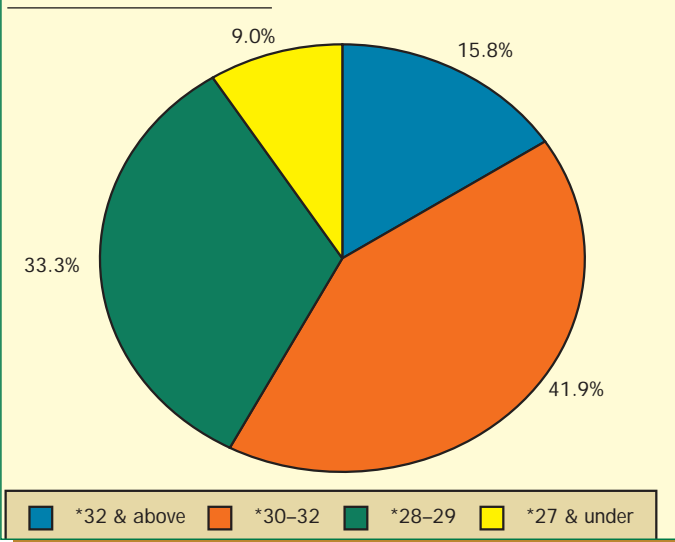


FIGURE 5: UNIFORMITY

