

## Important messages from Shippers' Conference

The Australian Cotton Shippers Association (ACSA) Conference at the Gold Coast in September 2003 threw the spotlight on the quality of the Australian crop. And the messages from merchants, spinners and end-users were that improvements are needed in some areas.

A presentation by Clyde Agriculture's cotton operations general manager, Peter Cottle noted that fibre quality was rated important by two-thirds of the grower respondents in a survey he conducted on this issue.

Three to five years earlier, a similar survey showed only 17 per cent of growers rating fibre quality highly.

But the survey also indicated that much work is still required to develop advice about how fibre quality can be managed by growers — from variety selection, planting date, crop management, harvesting, gin delivery and processing procedures.

Peter highlighted two particular fibre quality attributes needing urgent attention — micronaire and neps — and

suggested that fibre maturity and its measurement is the issue causing the greatest angst in the industry at present.

### PLANT BREEDING VIEW

From a plant breeding standpoint, breeders appear to be well aware of fibre quality issues. Dr Greg Constable, principle CSIRO plant breeder told the conference that the CSIRO breeding team's fibre quality targets were:

- Strength: 30g/tex;
- Length: 1.15 inches;
- Uniformity: High (low neps);
- Micronaire: 3.8 – 4.4; and,
- Low neps.

He said fibre quality was affected by many factors including climate, varieties and management, and the best result came from getting all these right, not just one element.

Greg noted that from 1990 onwards there has been a big improvement in length, but this has now plateaued. He said strength had been improving since 1980, and there was material in the breeding pipeline capable of producing 35g/tx — well in excess of current requirements.

But micronaire changes have been minimal due to the negative association between fineness and yield.

He said neither variety nor Bt transgenics could alone explain a trend towards higher micronaire, arguing that climate and management are responsible for the variation in micronaire between seasons — particularly high temperatures, clear skies and low insect pressure.

### POSSIBLE DANGERS IDENTIFIED

CSIRO Textile and Fibre Technology project leader, Dr Stuart Gordon, told the Conference that benchmarking studies of Australian cotton against major competitors had highlighted some possible dangers ahead.

The survey, conducted quarterly, and due to finish in August 2004, rated Australian cotton against its competitors on micronaire, length, uniformity, short fibre, content, strength, extension, maturity, fineness, nep content, grade, colour, trash, contamination, spinning ability and dyeing ability.

So far, the survey has rated Australian cotton 'good' in relation to length, classing grade, spinning ability, trash content and colour, and 'best' in regard to contamination. But its ratings were unsatisfactory for micronaire, short fibre content and neps, compared with cotton supplied by the US, Brazil, China and Zimbabwe.

He pointed out that cotton was not only competing against itself in terms of fibre quality, but against man-made fibres, which continue to expand market share because they are not saddled with these natural processing and product performance discrepancies.

His main messages were:

- That man-made fibres continue to substitute for natural fibres;
- Competing countries are closing in on Australia in regard to fibre quality;
- Some international customers are unhappy about some aspects of fibre quality in Australian cotton; and,
- The management of fibre maturity and fineness from cotton field through to ginning is critical.


Stuart's views were confirmed by leading Thai spinner, Tayuth Sriyüksiri (historically purchases 70 per cent of his cotton requirements from Australia), who told the conference that weavers were continually requiring higher fibre strength in yarns supplied by spinners, due to faster operating machinery and improved technology.

He predicted that short fibre content would become a bigger issue in the future, because it means the spinner needs more cotton to produce the same volume of yarn.

#### MARKET SHARE PROBLEMS

Dunavant managing director, Gordon Cherry, warned that Australia has lost market share due to two recent lower production years, and there was no guarantee that this market share would be automatically regained when crop volumes improved.

While acknowledging Australia's previous excellent performance in world benchmarking studies in regard to contamination, he said the latest survey indicated that Australia's contamination reputation is going backwards rather than forwards.

He said the Australian cotton crop was falling behind on micronaire and strength, and Australia was in danger of becoming a price taker rather than price maker, concluding that improved quality performance is the only safeguard against price erosion. 

## Classing "An imperfect science"

By Stuart Thompson, Carrington Cotton Classing

Growers and cotton industry bodies often question uniformity and consistency of classing results between Australian classing offices (merchant and independent) and understandably they want answers.

A quote constantly drummed into our 1996 Calcot classing and marketing school class was "Cotton classing is not a perfect science." What our instructors meant was, there will always be slight differences of opinion between classers. This is where the independence of Carrington's classing facility comes in.

At Carrington we believe one of the best ways to generate consistent and uniform results is to have all of your cotton classed by one certified USDA classifier, so there can be no difference of opinion between classers.

We've learnt over the past six seasons that it's crucial to build a trusting relationship with our clients, so we encourage our growers to visit our facility and view the classing of their cotton and the classing process as a whole. This way both client and classer build a relationship and learn to understand each other's work.

When you talk to the classing manager at Carrington, you are also talking to the classer and HVI technician.

Carrington Cotton Classing has been in operation since 1998 and has built up a strong grower base from a wide range of cotton growing valleys. We also have a number of merchants who utilise the consistent results and independence of our classing office.

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