



2025 Grower Survey

intuitive
solutions

August 2025



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It is important to note that the responses contained within the CRDC Grower Survey provide a snapshot in time of grower data, but do not tell the full story. The Grower Survey is one of many research projects commissioned by CRDC to gather industry information. The results are not intended to be used in isolation, but rather in consideration of these other projects, such as the Australian cotton industry's Sustainability Framework and associated reporting, the industry's best practice program myBMP, extension program CottonInfo, and the significant program of R&D that is managed by CRDC. In conjunction with these programs, the Grower Survey helps the industry measure practices and inform continuous improvement. The results are as provided by growers and have not been independently verified. For any queries regarding the Grower Survey, please contact CRDC.

The Cotton Research and Development Corporation (CRDC) undertakes an annual survey of cotton growers to gather information about farming practices and growers' views on research, development and extension (RD&E). This information helps inform CRDC about the benefits of the research it invests in and priority areas for future research. Change in industry practice can be quantified by comparing information across the surveys conducted over the past 20 years.

Previous surveys have included a number of core annual questions and then a number of focus areas to investigate specific aspects of the farming system.

In 2017, CRDC undertook a review of the aims, purpose and design for the survey. The 2017 Grower Survey was developed by a working group including CRDC, Cotton Australia and researchers. The 2025 Grower Survey has been refined by the working group with reference to Grower Surveys undertaken between 2017-2024 and CRDC's Monitoring and Evaluation Framework and supplemented by research questions relevant to the seasonal conditions. This survey gathered mid-term assessment of growers' views of CRDC's performance against its Strategic Plan objectives and performance measures.

The 2025 Grower Survey included:

- Baseline information about growers and their farm business including respondents' demographics (region, farm area) and season and farm information (yields, area of cotton).
- A number of other focus areas, including:
 - Water
 - Energy
 - R&D impact on farming systems
 - Nutrition and soil
 - IPM and crop protection
 - Workforce
 - Sustainability
 - Technology
 - CRDC and CottonInfo
 - Voice of the grower
- As some questions are specific to cotton growers in the 2024-25 season, these questions will have a slightly lower sample size compared to most other questions. Also, due to the length of the survey, some questions are asked on rotation (to roughly 50% of respondents).

The results from the 2025 Grower Survey now follow. Ahead of this, we provide an explanation to assist readers in understanding and interpreting the results in this report.

How the survey was conducted

The 2025 Grower Survey was conducted using a CATI (Computer Assisted Telephone Interviewing) data collection methodology. This included:

- Growers being contacted and invited to complete the survey over the phone;
- Where this was not possible immediately, an interview appointment time was agreed and the interview completed at the agreed time.

When the survey was conducted

Surveys have usually been conducted in winter, focusing specifically on the preceding crop.

CRDC agreed that to ensure consistency over time, the Grower Survey should be conducted at the same time each year.

The 2025 Grower Survey opened on 4 June 2025 and ran until 24 June 2025. It is noted that there will be a small number of growers who will have not finishing picking at this time.

A look at the 2024-25 season

Approximately 480,000 hectares were planted to irrigated and dryland cotton in the 2024–25 season, a decrease on the 509,000 hectares the season before due to less favourable seasonal conditions.

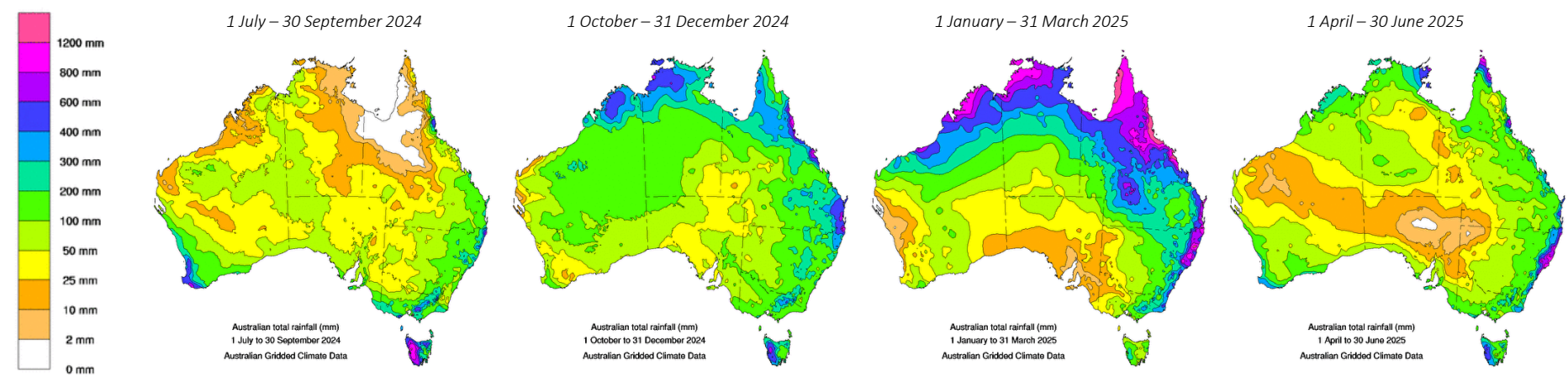
At the time of reporting in August 2025, ginning is still occurring across the industry and so a final production number has not been reached. However, it is estimated that total production will exceed five million bales.

CRDC's investment in 2024-25:

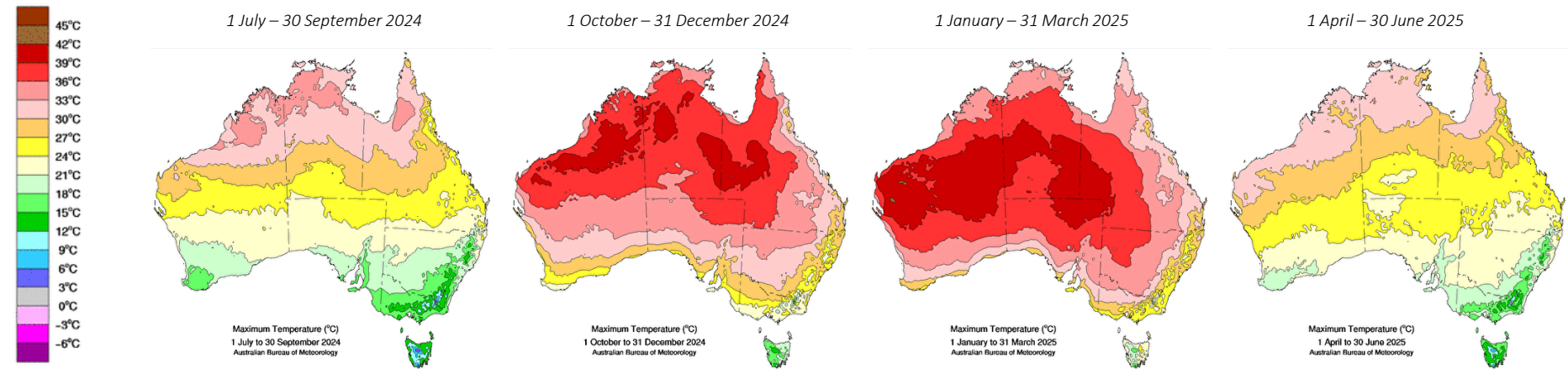
- \$21.8 million – CRDC's expenditure in delivering year two of Clever Cotton on behalf of cotton growers and the Australian Government. Of this, \$17 million was directly invested in RD&E projects in collaboration with our research partners.
- 243 – RD&E projects
- 94 – research partners
- 3 – pillars: Paddock, People, Planet



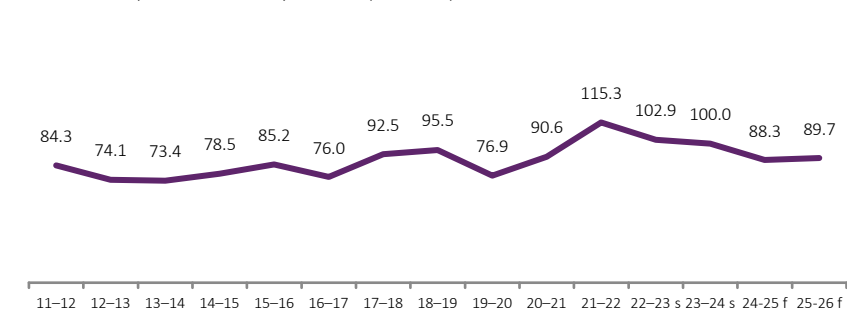
Total rainfall (in mm) by calendar quarter of the 2024-25 season



Mean maximum temperature (in degrees Celsius) by calendar quarter of the 2024-25 season

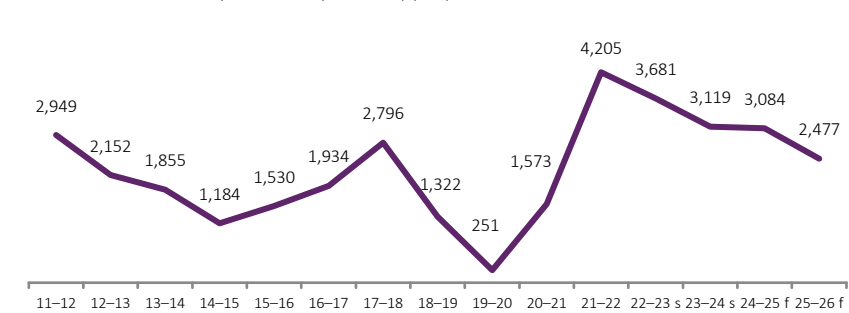


Index of cotton prices received by farmers (Australia)



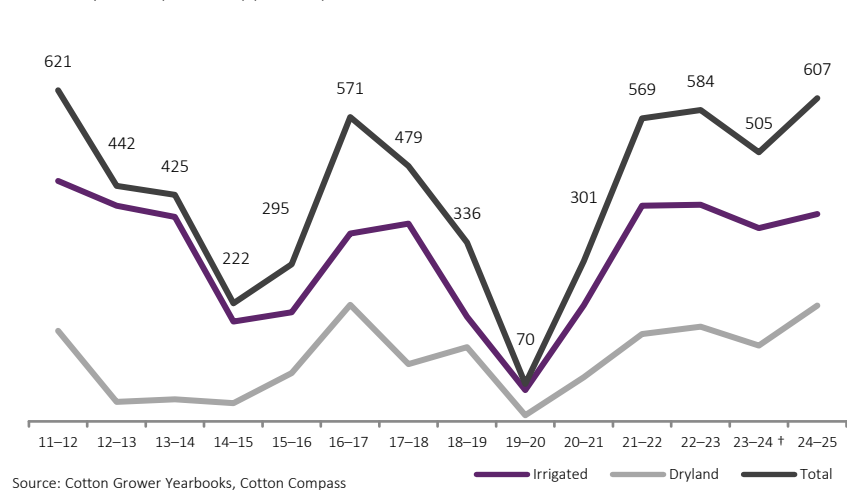
f ABARES forecast. s ABARES estimate.
Notes: The indexes for commodity and price groups are calculated on a chain-weighted basis using Fisher's ideal index with a reference year of 2023-24 = 100. Indexes for most individual commodities are based on annual gross unit value of production. Prices used in these calculations exclude GST. Details for establishments with estimated value of agricultural operations (EVAO) of \$5,000 or more from 1994-95 to 2014-15; and EVAO of \$40,000 or more from 2015-16.
Sources: ABARES; Australian Bureau of Statistics

Gross value of cotton lint production (Australia) (\$m)



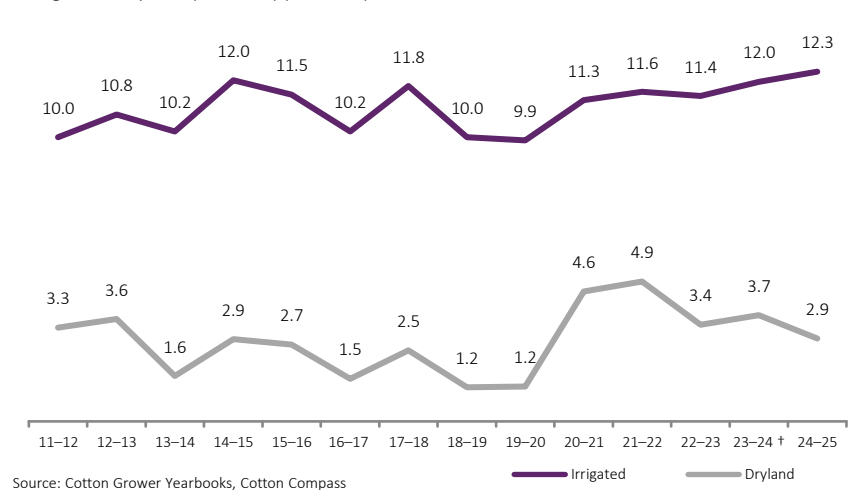
f ABARES forecast. s ABARES estimate. Figures are value delivered to gin
Notes: The gross value of production is the value placed on recorded production at the wholesale prices realised in the marketplace. The point of measurement can vary between commodities. Generally the marketplace is the metropolitan market in each state and territory. However, where commodities are consumed locally or where they become raw material for a secondary industry, these points are presumed to be the marketplace. Prices used in these calculations exclude GST. Details for establishments with estimated value of agricultural operations (EVAO) of \$1,500 or more until 1980-81; \$2,500 or more from 1981-82 to 1985-86; EVAO of \$20,000 or more from 1986-87 to 1990-91; EVAO of \$22,500 or more from 1991-92 to 1992-93; EVAO of \$5,000 or more from 1993-94 to 2014-15; and EVAO of over \$40,000 from 2015-16.
Sources: ABARES; Australian Bureau of Statistics; Cotton Australia

Cotton crop areas (Australia) ('000 ha)



Source: Cotton Grower Yearbooks, Cotton Compass

Average cotton yields (Australia) (bales/ha)



Source: Cotton Grower Yearbooks, Cotton Compass

Growers were asked to provide estimates of three yield measures they achieved for the 2024-25 growing season. These were average yield across their entire crop, and the highest and then lowest yield from one field for the same crop.

This provides a sense of the breadth of performance across their farms.

The results provided by growers indicate the variation across fully irrigated, partially irrigated and raingrown/dryland areas.

- For fully irrigated areas, the 2025 survey reported an average yield of 12.35 bales per hectare. This reported result is up on that reported in 2024 (up 0.42).
- For raingrown/dryland areas, the average yield was 4.05, a similar result to that reported in 2024.
- Results for partially irrigated growers were not reported due to the small sample size.

What were your yields for the 2024-25 cotton growing season across the cotton areas?

Base: All growers who grew cotton during the 2024-25 season; n varies (Fully Irrigated, n = 177, Raingrown/Dryland, n = 62)
Part irrigation not reported due to low sample size.

	Fully Irrigated (bales per ha)	Raingrown/Dryland (bales per ha)
Average yield	12.35 2024: 11.93	4.05 2024: 4.05
Yield achieved by your highest-yielding field (average of grower-reported yield)	14.11 2024: 13.57	4.76 2024: 5.09
Yield achieved by your lowest-yielding field (average of grower-reported yield)	10.24 2024: 10.13	3.34 2024: 3.36
Range of variation from average yield	3.87 2024: 3.44	1.41 2024: 1.73

The results above are results of survey measurements reported at an overall level – covering all regions and farm sizes.

Key results by Region and Size of Total Farm Area (fully irrigated results only)

The commentary to the left provides high-level insights into the results at an overall level, and (where applicable) results across two main segments – Region and Size of Total Farm Area

The base represents the cohort of respondents to the question (e.g. all growers who grew cotton during the 2024-25 season and responded to the survey), and the number that provided an answer to the question (177 growing fully irrigated cotton, 62 growing raingrown/dryland cotton). Growers did not necessarily answer each question – as a result, the base across questions may vary.

The results below are results of survey measurements reported at two key segment levels: Region (six categories) and Size of Total Farm Area (three categories). For example, in Central Queensland 14 respondents answered the question, reporting an average yield of 11.47 bales per hectare across fully irrigated cotton fields.

Key results by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD (n=14)	Darling Downs (n=22)	Macintyre Balonne (n=30)	Northern NSW (n=50)	Macquarie (n=21)	Southern NSW (n=33)	Small (n=54)	Medium (n=80)	Large (n=43)
Average yield	11.47	11.28	12.31	11.98	14.07	13.38	11.89	12.47	12.72
Highest yield from one field	14.10	13.07	14.19	13.55	15.39	15.21	13.32	14.15	15.00
Lowest yield from one field	8.57	9.21	10.41	10.14	12.21	10.76	10.17	10.40	10.04
Range of variation from average yield	5.53	3.85	3.78	3.41	3.18	4.45	3.16	3.75	4.96

Segments were categorised as follows:

Region (based on Region at Q1)

- Central QLD
- Darling Downs
- Macintyre – Balonne
 - Border Rivers
 - St George/Dirranbandi
- Northern NSW
 - Gwydir
 - Lower/Upper Namoi
 - Bourke

- Macquarie
- Southern NSW
 - Lachlan
 - Murrumbidgee
 - Murray

Size of Total Farm Area (based on cropping area – full irrigation, part irrigation or raingrown/dryland - at Q3)

- Small (< 1,000 ha)
- Medium (1,000 – 5,000 ha)
- Large (> 5,000 ha)

A photograph of a row of young plants, possibly seedlings, growing in a field. The plants are small with green leaves and thin stems. The image is overlaid with a solid purple color. A horizontal dashed white line runs across the middle of the image, positioned just above the text.

Snapshot of key findings

2024-25 Cotton Crop



15%

Total farm area under cotton
production in 2024-25



1,077 ha

Grower-reported average
of hectares under cotton



12.35 bales/ha

Grower-reported average yield
on fully irrigated cotton area

Water



7.42 ML/ha

Average irrigation water applied to
cotton on fully irrigated hectares



272.5 mm

In-crop rainfall received between
planting and defoliation in 2024-25



1.26 bales/ML

Median Gross Production Water Use
Index on irrigated cotton area

R&D impact on Farming Systems



52%

Contributed data to industry R&D
(e.g. participation in trials or monitoring
activities on-farm, providing on-farm data, info
to researchers or industry projects)



37%

Held cotton industry research
trials on-farm in the 2024-25
cotton growing season



64%

Have a farm biosecurity plan
(i.e. one that identified hazards
and an action plan)

Nutrition and Soil



16%

Have used enhanced efficiency fertiliser in the 2024-25 cotton growing season



77%

Conducted soil tests to measure Mineral N levels before cotton planting



76%

Of those conducting tests, the typical strategy is to do some or every field, every season

IPM and Crop Protection



59%

Reported at least one of five listed diseases on-farm during the 2024-25 cotton growing season



53%

Have accessed the WAND spray hazardous inversion system website



74%

Are using weed control, pest control or a combination of both practices in natural areas on farm

CRDC and CottonInfo



87%

Are supportive of CRDC's research investments and activities



94%

Agree that CRDC is a trusted information source



96%

Agree that CottonInfo is a trusted information source

A photograph of a row of young plants, possibly seedlings, in a field. The plants are small with green leaves and thin stems, growing in dark soil. The entire image is covered with a semi-transparent purple overlay. A horizontal dashed white line is positioned across the middle of the image, passing through the plants.

FOCUS AREA

Farm Profiles

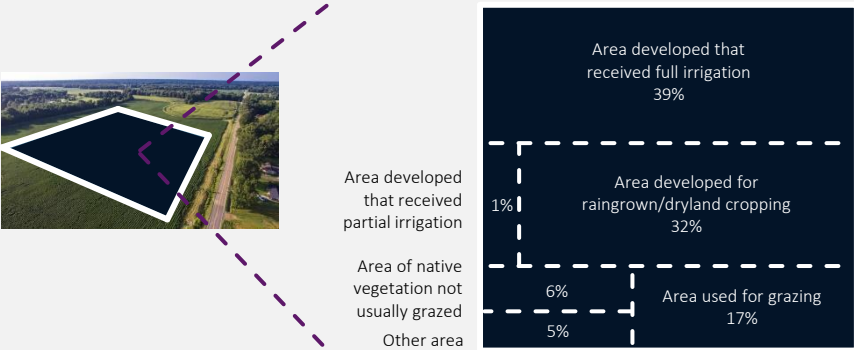
Farm Profiles

Area and distribution of farmland

Based on the information provided by respondents to the 2025 Grower Survey, we have estimated:

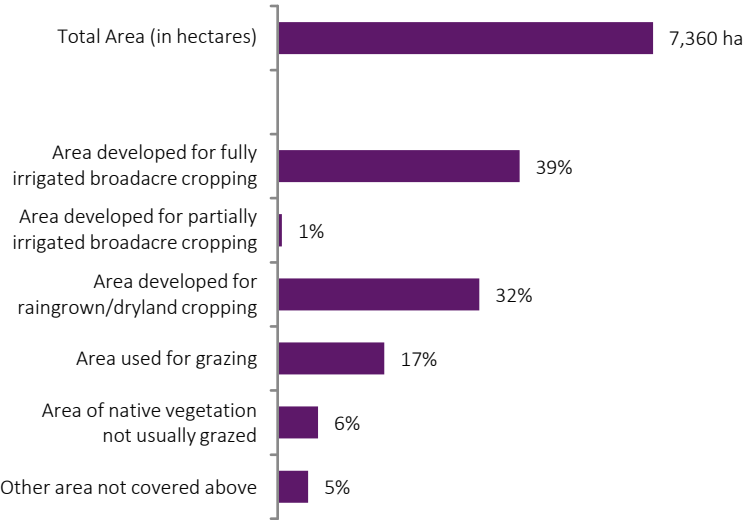
- An average (across all regions and farm sizes) total farm size of 7,360 ha;
- 72% of the land area was developed and available for cropping or other uses including cotton; with
- Growers again this year reporting that the majority of the developed area is either fully irrigated or developed for raingrown/dryland farming; whilst
- 28% of their total farm area remains in use for grazing, native vegetation or other.

The nature of cotton farming obviously varies across the different growing regions and farm sizes as illustrated in the results shown below.



What is the total area of your farm (in hectares), and of the total area of your farm, what is the area attributed to the following?

Base: All growers (excluding three outliers*); n = 213



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=30)	Northern NSW (n=70)	Macquarie (n=21)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=51)
Total area (ha)	3,825	1,912	13,851	8,314	7,183	7,964	957	4,431	21,091
Full irrigation	37%	40%	32%	26%	26%	65%	59%	31%	29%
Partial irrigation	1%	2%	0%	1%	<1%	<1%	<1%	1%	<1%
Raingrown/Dryland	24%	40%	26%	47%	47%	7%	15%	39%	41%
Grazing	30%	11%	24%	15%	19%	15%	13%	20%	18%
Native vegetation	7%	4%	10%	6%	6%	6%	7%	5%	8%
Other	1%	3%	9%	6%	2%	7%	6%	4%	4%

* Three outliers were removed from this analysis for having a significantly different farm size to the rest of the respondent base (400,000 or larger, next highest reported figures were 80,000, 80,000, and 77,670).



FOCUS AREA

2024-25 Cotton Crop

2024-25 Cotton Crop

Cotton area and farming systems

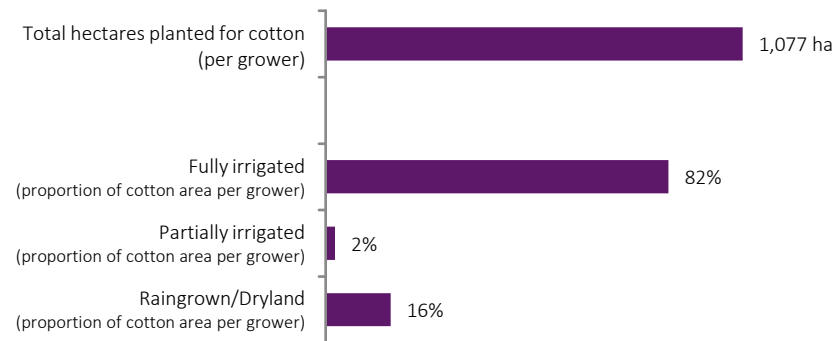
Key information about the growers’ area planted for the 2024-25 season was collected during the survey. Based on the feedback provided by cotton growers responding to the 2025 CRDC Grower Survey, we note that:

It has been estimated that the average area of cotton planted was 1,077 ha:

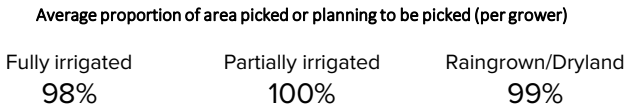
- On average, 82% of cotton area per grower was fully irrigated;
- 2% was partially irrigated; and
- 16% was raingrown/dryland.

Based on the feedback provided by growers, it is estimated that just under three in four (72%) were growing cotton on a single irrigation type, with the majority of these (65%) growing cotton only on fully irrigated hectares.

What was the total number of hectares planted for cotton during the 2024-25 cotton growing season? And of these hectares, how many hectares were fully irrigated, partially irrigated or raingrown/dryland? Base: All growers who grew cotton during the 2024-25 season; n = 200



And of these hectares, how many hectares were picked or are planning to be picked (e.g. not ploughed in due to flooding, spray drift, hail etc.)? Base: All growers who grew cotton during the 2024-25 season; n = 200



Key results by Region and Size of Total Farm Area

	Central QLD (n=16)	Darling Downs (n=27)	Macintyre Balonne (n=30)	Northern NSW (n=62)	Macquarie (n=22)	Southern NSW (n=34)	Small (n=58)	Medium (n=91)	Large (n=51)
Total area (ha per grower)	1,099	511	1,973	1,275	793	770	263	639	2,784
Fully irrigated	96%	73%	93%	60%	100%	100%	91%	78%	80%
Partially irrigated	0%	5%	1%	4%	0%	0%	1%	4%	2%
Raingrown/Dryland	4%	22%	6%	36%	0%	0%	8%	18%	19%

2024-25 Cotton Crop

Yields for the 2024-25 cotton growing season

Growers were asked to provide estimates of three yield measures they achieved for the 2024-25 growing season. These were average yield across their entire crop, and the highest and then lowest yield from one field for the same crop.

This provides a sense of the breadth of performance across their farms.

The results provided by growers indicate the variation across fully irrigated, partially irrigated and raingrown/dryland areas.

- For fully irrigated areas, the 2025 survey reported an average yield of 12.35 bales per hectare. This reported result is up on that reported in 2024 (up 0.42).
- For raingrown/dryland areas, the average yield was 4.05, a similar result to that reported in 2024.
- Results for partially irrigated growers were not reported due to the small sample size.

Average yield change by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD	Darling Downs	Macintyre Balonne	Northern NSW	Macquarie	Southern NSW	Small	Medium	Large
Average yield (2024-25)	11.47	11.28	12.31	11.98	14.07	13.38	11.89	12.47	12.72
Average yield (2023-24)	11.21	10.73	11.92	12.15	13.58	12.22	11.39	12.05	12.52
Difference	+ 0.26	+ 0.55	+ 0.39	- 0.17	+ 0.49	+ 1.16	+ 0.50	+ 0.42	+ 0.20

What were your yields for the 2024-25 cotton growing season across the cotton areas?

Base: All growers who grew cotton during the 2024-25 season; n varies

(Fully Irrigated, n = 177, Raingrown/Dryland, n = 62)

Part irrigation not reported due to low sample size.

Key results by Region and Size of Total Farm Area (fully irrigated results only)

	Fully Irrigated (bales per ha)	Raingrown/Dryland (bales per ha)
Average yield	12.35 2024: 11.93	4.05 2024: 4.05
Yield achieved by your highest-yielding field (average of grower-reported yield)	14.11 2024: 13.57	4.76 2024: 5.09
Yield achieved by your lowest-yielding field (average of grower-reported yield)	10.24 2024: 10.13	3.34 2024: 3.36
Range of variation from average yield	3.87 2024: 3.44	1.41 2024: 1.73

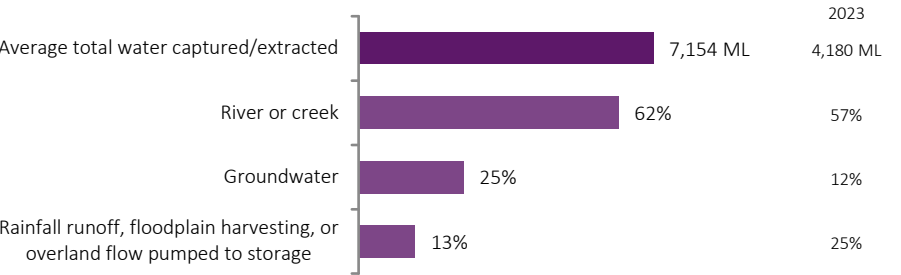
	Central QLD (n=14)	Darling Downs (n=22)	Macintyre Balonne (n=30)	Northern NSW (n=50)	Macquarie (n=21)	Southern NSW (n=33)	Small (n=54)	Medium (n=80)	Large (n=43)
Average yield	11.47	11.28	12.31	11.98	14.07	13.38	11.89	12.47	12.72
Highest yield from one field	14.10	13.07	14.19	13.55	15.39	15.21	13.32	14.15	15.00
Lowest yield from one field	8.57	9.21	10.41	10.14	12.21	10.76	10.17	10.40	10.04
Range of variation from average yield	5.53	3.85	3.78	3.41	3.18	4.45	3.16	3.75	4.96

A photograph of a row of young plants in a field, overlaid with a semi-transparent purple filter. A horizontal dashed white line spans the width of the image, positioned just above the plants. The text 'FOCUS AREA' is located to the left of this line, and the word 'Water' is located to the right of the line, further down the page.

FOCUS AREA

Water

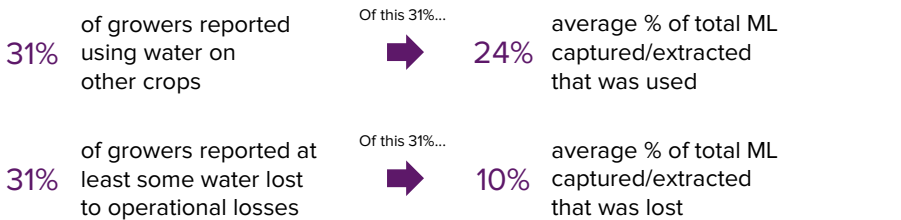
For the 2024-25 cotton growing season, how much water (in megalitres) was captured or extracted from?
Base: All growers who grew cotton during the 2024-25 season and captured/extracted water; n = 160 *



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=21)	Macintyre Balonne (n=24)	Northern NSW (n=45)	Macquarie (n=19)	Southern NSW (n=29)	Small (n=52)	Medium (n=72)	Large (n=36)
Total water captured/extracted	7,991	1,455	12,431	5,391	5,510	11,453	1,667	4,676	20,043
River or creek	77%	40%	66%	46%	78%	72%	57%	59%	74%
Rainfall runoff, harvesting, etc.	8%	33%	5%	43%	21%	27%	26%	30%	14%
Groundwater	15%	27%	29%	11%	1%	1%	17%	12%	12%

How much of the water captured or extracted ([total ML from above] megalitres) was used on other crops or lost to operational losses (i.e. blow outs)? †
Base: All growers who grew cotton during the 2024-25 season and captured/extracted water; n = 160 **



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=21)	Macintyre Balonne (n=24)	Northern NSW (n=45)	Macquarie (n=19)	Southern NSW (n=29)	Small (n=52)	Medium (n=72)	Large (n=36)
% of growers using water on other crops	40%	38%	25%	16%	5%	59%	38%	36%	11%
Of these growers...									
Average % of total ML used	9%	8%	29%	24%	4%	33%	24%	25%	17%
% of growers reporting at least some water lost	27%	19%	33%	31%	37%	38%	23%	35%	33%
Of these growers...									
Average % of total ML lost	9%	9%	10%	14%	6%	7%	10%	10%	10%

* For proportion calculations, responses were only considered where figures for all sources were known (n = 3 removed, n = 157 valid for analysis).
** For proportion calculations, responses were only considered where figures for all sources were known (Other crops: n = 2 removed, n = 48 valid for analysis; Operational losses: n = 0 removed, n = 49 valid for analysis).

How much in-crop rainfall (in mm) did you receive in the 2024-25 cotton growing season between planting and defoliation?

Base: All growers who grew cotton during the 2024-25 season and could provide a response; n = 177

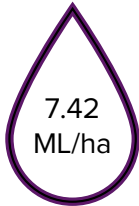


272.5 mm
2023: 226.4 mm

In-crop rainfall
(mm)

How much irrigation water (in megalitres per hectare) was applied to cotton during the 2024-25 cotton growing season?

Base: All growers who grew cotton during the 2024-25 season under full or part irrigation and could provide a response; n varies (Fully Irrigated, n = 173). Part irrigation not reported due to low sample size.



Cotton under
full irrigation

2023 (n = 160):
6.92 ML/ha

What was your estimated soil moisture deficit (in mm) for:

Base: All growers who grew cotton during the 2024-25 season; n varies (Sowing: Fully Irrigated, n = 137, Raingrown/Dryland, n = 48). (Defoliation: Fully Irrigated, n = 142, Raingrown/Dryland, n = 49) Part irrigation not reported due to low sample size.

	Fully Irrigated (mm)	Raingrown/Dryland (mm)
Sowing	93.5 2023: 58.8	84.7 2023: 146.2
Defoliation/End of season	107.0 2023: 114.0	70.1 2023: 110.1

Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=25)	Macintyre Balonne (n=24)	Northern NSW (n=53)	Macquarie (n=19)	Southern NSW (n=32)	Small (n=52)	Medium (n=82)	Large (n=43)
In-crop rainfall (mm)	334.4	345.3	376.8	273.1	201.3	87.9	272.2	274.9	268.2

Key results by Region and Size of Total Farm Area

	Central QLD (n=16)	Darling Downs (n=22)	Macintyre Balonne (n=27)	Northern NSW (n=48)	Macquarie (n=19)	Southern NSW (n=33)	Small (n=55)	Medium (n=74)	Large (n=44)
Fully irrigated – Mega litres per ha	7.74	4.84	7.22	6.70	9.26	9.68	6.77	7.31	8.41

Key results by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD (n=11)	Darling Downs (n=18)	Macintyre Balonne (n=25)	Northern NSW (n=38)	Macquarie (n=12)	Southern NSW (n=26)	Small (n=44)	Medium (n=62)	Large (n=31)
Sowing	26.4	75.3	66.2	90.7	117.1	173.5	68.0	90.6	135.6
Base:	(n=12)	(n=18)	(n=25)	(n=42)	(n=13)	(n=26)	(n=45)	(n=62)	(n=35)
Defoliation/ End of season	61.3	92.2	140.4	56.7	78.6	159.6	95.3	119.2	100.2

Water

GPWUI: Gross Production Water Use Index

The GPWUI (Gross Production Water Use Index) is an index to benchmark water productivity. This benchmark relates total production (bales) to the total water input (water from all sources: irrigation, effective rainfall and soil moisture).

The calculation of GPWUI is based off methodology from NSW Department of Primary Industries and utilises several questions from the 2025 CRDC Grower Survey. The results reported are from fully irrigated and partially irrigated cotton crops, only utilise grower responses where all inputs were known at the time of the interview, and reports the average GPWUI result as a median (the middle result for the set of data arranged in ascending order) and not a mean as typically reported.

The results from the 2025 Grower Survey indicate that, across growers who provided answers to all questions used in the GPWUI calculations, the average GPWUI was at 1.26 bales/ML. The table below show the variation of this index across the growing regions (ranging from 1.21 in Southern NSW to 1.46 in Northern NSW).

Gross Production Water Use Index (median of grower results) *
Base: All growers who provided answers to all questions used within GPWUI calculations; n = 134

How GPWUI is calculated:

The following calculation is performed for each individual farm and then averaged (median) to provide an overall measure of GPWUI.

Fully irrigated and
partially irrigated farms

1.26
bales/ML

Total yield (bales)

divided by

Water held in storages before pumping commenced for 2024-25 season (ML)



Water captured/extracted from sources (ground water, river or creek, rainfall runoff, floodplain harvesting, or overland flow pumped to storage, etc.) (ML)



In-crop rainfall (mm) divided by 100 (to convert to ML/ha) X 76.61% rainfall run-off coefficient X number of cotton ha under full and part irrigation (ML)



Assumption of 0.5 ML/ha of change in soil moisture X number of cotton ha under full and part irrigation (ML)



Water used on other crops or lost to operational losses (ML)



Left-over water in storages at the end of the 2024-25 cotton season (ML)

Key results by Region and Size of Total Farm Area

	Central QLD (n=13)	Darling Downs (n=17)	Macintyre Balonne (n=20)	Northern NSW (n=34)	Macquarie (n=15)	Southern NSW (n=29)	Small (n=42)	Medium (n=63)	Large (n=29)
Median GPWUI (bales/ML)	1.22	1.32	1.26	1.46	1.26	1.21	1.27	1.28	1.15

* In 2025, the calculation of GPWUI was inclusive of partially irrigated cotton yield and water use and also reported as a median result instead of a mean result, and therefore, there is no trend reported on 2023.



FOCUS AREA

Energy

Energy

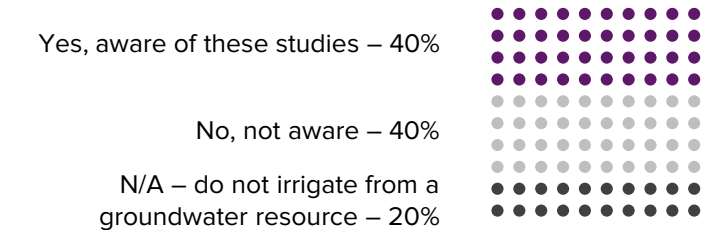
Alternative energy – solar and biodiesel

The 2025 study collected feedback from growers about their awareness and disposition towards alternative energy sources – specifically solar and biodiesel. The results from the 2025 Grower Survey show that:

- There was a modest level of grower awareness of industry studies showing good economic returns for bore irrigators integrating solar into pump sites – two in five (40%) said they were aware of these studies, with a further two in five (40%) reporting they were not aware. The awareness of studies looked to be stronger in Central QLD and Macquarie regions, as well as medium-sized farms.
- Almost four in five (79%) reported they would look at substituting biodiesel for traditional diesel fuel if it were possible to make locally from relevant cropping feedstocks. This intention (if possible) was consistent across all regions (ranging from 72% to 100%) and all farm sizes (ranging from 63% to 91%).

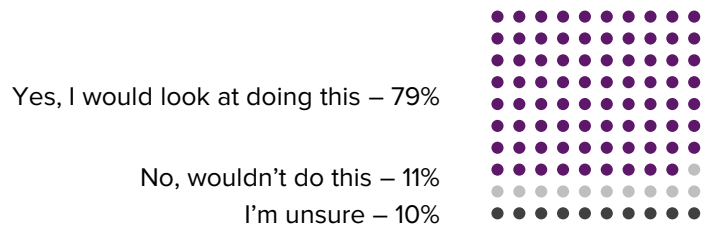
Are you aware of the industry studies showing good economic returns for bore irrigators integrating solar into pump sites? *

Base: All growers (asked via rotation); n = 101 †



Would you look at substituting biodiesel for traditional diesel fuel if it were possible to make locally from relevant cropping feedstocks, such as canola? *

Base: All growers (asked via rotation); n = 101 †



Key results by Region and Size of Total Farm Area

	Central QLD (n=9)	Darling Downs (n=10)	Macintyre Balonne (n=18)	Northern NSW (n=31)	Macquarie (n=10)	Southern NSW (n=18)	Small (n=32)	Medium (n=46)	Large (n=23)
Yes, aware	67%	30%	33%	39%	80%	28%	31%	52%	26%
No, not aware	33%	50%	50%	35%	20%	50%	41%	37%	43%
N/A – do not groundwater irrigate	0%	20%	17%	26%	0%	22%	28%	11%	30%

	Central QLD (n=9)	Darling Downs (n=10)	Macintyre Balonne (n=18)	Northern NSW (n=31)	Macquarie (n=10)	Southern NSW (n=18)	Small (n=32)	Medium (n=46)	Large (n=23)
Yes, would do this	78%	90%	72%	77%	100%	83%	63%	91%	78%
No, wouldn't do this	22%	0%	11%	10%	0%	17%	19%	4%	13%
I'm unsure	0%	10%	17%	13%	0%	0%	19%	4%	9%

* Question is new to the 2025 research.
† Question was asked on rotation to roughly 50% of respondents.

A photograph of a row of young plants, possibly seedlings, in a field. The plants are small with green leaves and thin stems, growing in dark soil. The entire image is covered with a semi-transparent purple overlay. A horizontal dashed white line is positioned across the middle of the image, separating the text 'FOCUS AREA' on the left from the title 'R&D Impact on Farming Systems' on the right.

FOCUS AREA

R&D Impact on Farming Systems

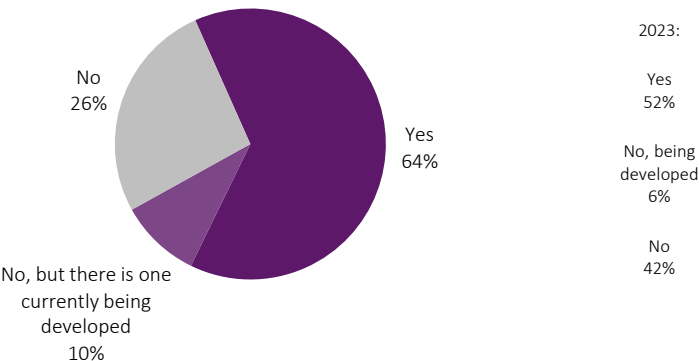
The 2025 study collected feedback from growers about the impact of R&D on their farm. The results show that:

- The presence of a farm biosecurity plan was measured again in the 2025 survey, with just under two in three (64%) growers reporting they have a farm biosecurity plan. This result is up on the 2023 report results of 52%. Medium-sized and larger-sized farms were more likely to report having a farm biosecurity plan in place (68% and 69% respectively).
- Just over one in four (26%) growers reported they did not have a farm biosecurity plan in place (and wasn't being developed at the time). As per the comment above, this was more common amongst smaller-sized farms, as well as growers in the Central QLD and Macintyre-Balonne region.

Growers were also asked if they were quantifying changes in conditions on their farm – specifically regarding biodiversity and soil health:

- Just under one in four (23%) growers reported that they were quantifying changes in biodiversity condition on-farm. When asked to specify what tools and technology they are using, answers were varied with the majority stating they get a third party or their advisor / agronomist / consultant to do this.
- Just under three in four (73%) said they were quantifying changes in soil health condition on-farm. When asked to specify what tools and technology they are using, the majority (55%) stated they were using soil tests / samples / probes to do this. Some other mention answers were utilizing various cropping practices as well as considering their choice and use of fertilizer.

Do you have a farm biosecurity plan (i.e. one that identified hazards and an action plan)?
Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes	67%	69%	53%	64%	73%	58%	54%	68%	69%
No, but one being developed	0%	7%	16%	10%	5%	14%	9%	10%	9%
No	33%	24%	31%	26%	23%	28%	37%	22%	22%

Are you currently quantifying changes in biodiversity condition on your farm? *

Base: All growers; n = 216.

23% (n = 50) said yes – they were then asked to specify what tools and technology they are using...

- 6% (n = 12) - Third-party business (e.g. FlintPro, Freshcare, AgWorld)
- 4% (n = 9) - Farm advisors / agronomists / consultants do this
- 2% (n = 4) - Robot spraying / camera spraying
- 2% (n = 4) - Soil testing
- 1% (n = 3) - Observations
- 1% (n = 3) - Satellite imagery / drones
- 1% (n = 3) - Bat and bird monitoring
- 1% (n = 3) - Considered fertiliser options like organic fertiliser

Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes	44%	10%	16%	30%	9%	25%	26%	15%	33%
No	56%	90%	84%	70%	91%	75%	74%	85%	67%

Are you currently quantifying changes in soil health condition on your farm? *

Base: All growers; n = 216

73% (n = 158) said yes – they were then asked to specify what tools and technology they are using...

- 55% (n = 118) - Soil testing / samples / probes
- 7% (n = 15) - Crop rotations / green manure crops / cover crops / cotton trash
- 6% (n = 14) - Considered fertiliser options (e.g. gypsum, organic, synthetic)
- 6% (n = 12) - Soil carbon (no further information)
- 4% (n = 8) - Farm advisors / agronomists / consultants do this
- 3% (n = 7) - Third-party business (e.g. AgWorld, Downforce)
- 3% (n = 7) - Electromagnetic Induction (EM) surveys
- 2% (n = 5) - Spatial data / satellite imaging

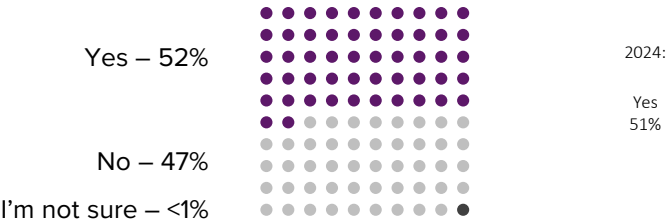
Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes	83%	72%	69%	77%	59%	75%	75%	70%	76%
No	17%	28%	31%	23%	41%	25%	25%	30%	24%

* Question is new to the 2025 research.

Are you contributing any data to industry R&D (such as through participation in trials or monitoring activities on farm or providing on-farm data or information to researchers or industry projects)?

Base: All growers; n = 216

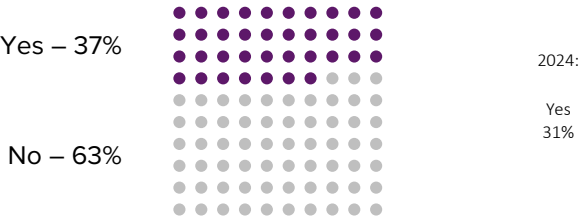


Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes	50%	41%	59%	57%	45%	47%	45%	47%	70%
No	50%	59%	38%	43%	55%	53%	55%	53%	28%
I'm not sure	0%	0%	3%	0%	0%	0%	0%	0%	2%

Did you have any cotton industry research trials on your farm during the 2024-25 cotton growing season? (e.g. CRDC, CSD, CSIRO, NSW DPI, QLD DPI, Universities, Bayer, etc.)?

Base: All growers who grew cotton during the 2024-25 season; n = 200



	Central QLD (n=16)	Darling Downs (n=27)	Macintyre Balonne (n=30)	Northern NSW (n=62)	Macquarie (n=22)	Southern NSW (n=34)	Small (n=58)	Medium (n=91)	Large (n=51)
Yes	44%	30%	47%	44%	27%	24%	22%	37%	53%
No	56%	70%	53%	56%	73%	76%	78%	63%	47%

Of the 37% (n = 74) who reported having cotton industry research trials on-farm during the 2024-25 cotton growing season, they were then asked to specify who conducted these trial/s...

- CSD - 15% (n = 30)
- CRDC - 8% (n = 16)
- CSIRO - 5% (n = 9)
- NSW DPI - 2% (n = 4)
- Bayer - 2% (n = 3)
- Crown Analytical - 2% (n = 3)
- Unnamed private party (agronomist, consultant, etc.) - 2% (n = 3)



FOCUS AREA

Nutrition and Soil

Nutrition and Soil

Nutrient products used and rate of application

Which nutrient products (both nitrogen-based and blended products) did you apply on your cotton field/s in 2024-25? Please select up to three each from the following lists.

Base: All growers who grew cotton during the 2024-25 season; n = 200

	% used product	Average application rate (in kg/ha) – fully irrigated	Average application rate (in kg/ha) – raingrown/ dryland
Nitrogen-based products			
Urea	97%	459.8	163.1
Anhydrous Ammonia	13%	207.5	26.7
Easy N	7%	64.1	1.4
Other (please specify)	12%	381.8	40.0
Blended products			
Cotton Sustain	32%	219.6	79.0
Granulock SS	4%	210.0	47.5
Granulock Zn	16%	167.2	10.8
MAP	20%	156.6	34.3
MAP (Zinc)	14%	150.6	69.4
DAP	9%	162.1	0.0
Compost	16%	3,488.8	875.0
Muriate of Potash	13%	92.7	44.0
Other (please specify)	36%	940.4	316.3
Nutrients applied *			
Nitrogen	n/a	251.52	77.76
Phosphorus	n/a	33.55	8.30
Potassium	n/a	24.81	11.31
Zinc	n/a	0.93	0.34
Sulfur	n/a	6.76	1.43

Key results by Region and Size of Total Farm Area (% used product)

	Central QLD (n=16)	Darling Downs (n=27)	Macintyre Balonne (n=30)	Northern NSW (n=62)	Macquarie (n=22)	Southern NSW (n=34)	Small (n=58)	Medium (n=91)	Large (n=51)
N-based products									
Urea	94%	100%	97%	94%	100%	100%	95%	98%	96%
Anhydrous Ammonia	6%	0%	27%	15%	9%	18%	7%	12%	22%
Easy N	13%	19%	7%	5%	0%	3%	7%	7%	6%
Other (please specify)	38%	4%	17%	13%	9%	3%	17%	8%	12%
Blended products									
Cotton Sustain	38%	37%	53%	42%	23%	3%	33%	29%	37%
Granulock SS	0%	4%	3%	3%	0%	9%	3%	3%	4%
Granulock Zn	38%	7%	17%	10%	5%	32%	21%	14%	12%
MAP	6%	11%	7%	16%	32%	47%	9%	20%	31%
MAP (Zinc)	25%	7%	13%	15%	27%	9%	5%	18%	18%
DAP	25%	0%	7%	2%	9%	9%	17%	5%	6%
Compost	6%	22%	17%	8%	0%	41%	12%	18%	16%
Muriate of Potash	19%	26%	13%	13%	5%	0%	16%	12%	10%
Other (please specify)	13%	48%	40%	39%	36%	26%	29%	40%	37%
Average application rate of nutrient across fully irrigated cotton growers (kg/ha)									
Nitrogen	331.11	201.82	277.50	236.97	292.37	237.21	237.54	239.35	292.57
Phosphorus	47.80	18.94	30.99	26.06	35.37	44.54	31.50	30.98	41.00
Potassium	36.39	46.25	42.62	28.52	17.33	1.70	27.19	23.99	23.20
Zinc	1.66	0.71	1.24	0.89	0.90	0.82	0.88	0.85	1.14
Sulfur	9.86	5.72	5.71	6.25	6.61	7.27	7.74	5.98	6.88

* "Nutrients applied" was calculated by reviewing each product and the proportion of each nutrient within each product per kg. These proportions were then multiplied by each product application rate and added together to provide an application rate of the nutrient.

Nutrition and Soil

Use of enhanced efficiency fertiliser

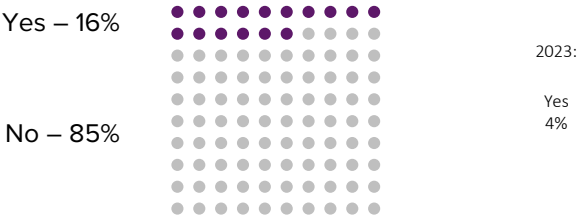
The 2025 study collected feedback from growers about nutrition and soil: what nutrients were applied, use of enhanced efficiency fertiliser, and conducting soil tests to measure Mineral N before cotton planting. The results show that:

- One in six (16%) growers indicated they have used enhanced efficiency fertiliser (e.g. controlled or slow-release fertiliser, nitrification inhibitor, urease inhibitor) in the 2024-25 cotton growing season. This is an increase from 4% when last reported in 2023.
- The extent of use of enhanced efficiency fertiliser was higher among growers in the Central QLD region (38% said this), and slightly higher from larger-sized farms (24%).

Just over three in four (77%) reported that they conducted soil tests to measure Mineral N (Nitrate-N and Ammonium-N) levels before cotton planting:

- Of those that reported conducting soil tests, their typical strategy was either to perform the tests on some field every season (44% of those who conducted tests said this), or every field every season (31%).
- Of those that did not report conducting soil tests (23%), the main reasons mentioned for not conducting these pre-season soil tests was “related to previous experience” (57%), followed by a “lack of time” (24%).

Have you used enhanced efficiency fertiliser (e.g. controlled or slow-release fertiliser, nitrification inhibitor, urease inhibitor) in the 2024-25 cotton growing season?
Base: All growers who grew cotton during the 2024-25 season; n = 200



Key results by Region and Size of Total Farm Area

	Central QLD (n=16)	Darling Downs (n=27)	Macintyre Balonne (n=30)	Northern NSW (n=62)	Macquarie (n=22)	Southern NSW (n=34)	Small (n=58)	Medium (n=91)	Large (n=51)
Yes	38%	7%	13%	18%	14%	3%	16%	11%	24%
No	63%	93%	87%	82%	86%	97%	84%	89%	76%

Did you conduct soil tests to measure Mineral N (Nitrate-N and Ammonium-N) levels before cotton planting? *

Base: All growers who grew cotton during the 2024-25 season (asked via rotation); n = 91 †



77%

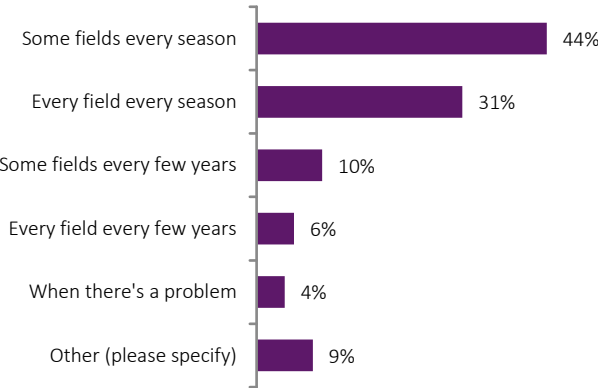
Conducted soil tests to measure Mineral N before cotton planting...

Of the 77% or n = 70 who conducted soil tests to measure Mineral N before cotton planting...

What is your typical strategy for conducting pre-season soil tests for nitrogen?

Please select all that apply. *

Base: All growers who grew cotton during the 2024-25 season AND conducted soil tests to measure Mineral N before cotton planting (asked via rotation); n = 70 †



Key results by Region and Size of Total Farm Area

	Central QLD (n=8)	Darling Downs (n=9)	Macintyre Balonne (n=17)	Northern NSW (n=26)	Macquarie (n=10)	Southern NSW (n=16)	Small (n=28)	Medium (n=41)	Large (n=22)
Yes, conducted	88%	44%	94%	85%	60%	75%	64%	80%	86%
No, did not conduct	13%	56%	6%	15%	40%	25%	36%	20%	14%

Key results by Region and Size of Total Farm Area

	Central QLD (n=7)	Darling Downs (n=4)	Macintyre Balonne (n=16)	Northern NSW (n=22)	Macquarie (n=6)	Southern NSW (n=12)	Small (n=18)	Medium (n=33)	Large (n=19)
Some fields every season	57%	50%	44%	32%	50%	42%	44%	42%	47%
Every field every season	14%	50%	31%	41%	17%	33%	22%	30%	42%
Some fields every few years	29%	0%	0%	9%	0%	25%	17%	9%	5%
Every field every few years	0%	0%	6%	9%	0%	8%	11%	3%	5%
When there's a problem	0%	0%	6%	5%	17%	0%	0%	6%	5%
Other	0%	0%	19%	9%	17%	0%	11%	9%	5%

* Question is new to the 2025 research.
† Question was asked on rotation to roughly 50% of respondents.

Did you conduct soil tests to measure Mineral N (Nitrate-N and Ammonium-N) levels before cotton planting? *

Base: All growers who grew cotton during the 2024-25 season (asked via rotation); n = 91 †



23%

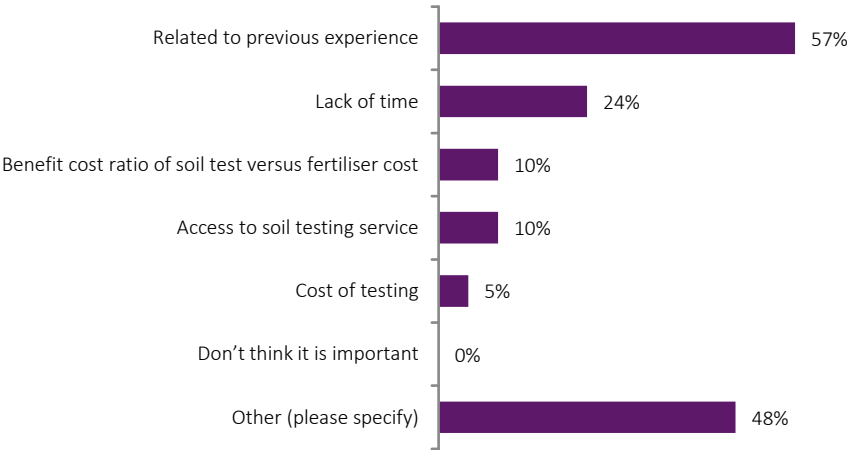
DID NOT conduct soil tests to measure Mineral N before cotton planting...

Of the 23% or n = 21 who DID NOT conduct soil tests to measure Mineral N before cotton planting...

What are the reasons for not conducting pre-season soil tests for nitrogen?

Please select all that apply. *

Base: All growers who grew cotton during the 2024-25 season AND DID NOT conduct soil tests to measure Mineral N before cotton planting (asked via rotation); n = 21 †



Key results by Region and Size of Total Farm Area

	Central QLD (n=8)	Darling Downs (n=9)	Macintyre Balonne (n=17)	Northern NSW (n=26)	Macquarie (n=10)	Southern NSW (n=16)	Small (n=28)	Medium (n=41)	Large (n=22)
Yes, conducted	88%	44%	94%	85%	60%	75%	64%	80%	86%
No, did not conduct	13%	56%	6%	15%	40%	25%	36%	20%	14%

"Agronomist does this."

"Based on expected yield crop removal rates."

"Consultant advice."

"Due to soil test result variability, we prefer to run a continuous accounting system accounting for crop removal and other losses."

"No value on it."

"Not sure if Mineral N was in soil tests."

"Our program is cotton on cotton and this time of year applying base rate and so need to know now."

"Probe test is not reliable."

"The relevancy and accuracy of the test this is the main reason."

"Use a uni that does tests."

* Question is new to the 2025 research.
† Question was asked on rotation to roughly 50% of respondents.

A photograph of a row of young plants in a field, overlaid with a semi-transparent purple filter. The plants are in the foreground, and the background is a blurred field. A horizontal dashed white line is positioned across the middle of the image, starting from the text 'FOCUS AREA' on the left and extending to the right.

FOCUS AREA

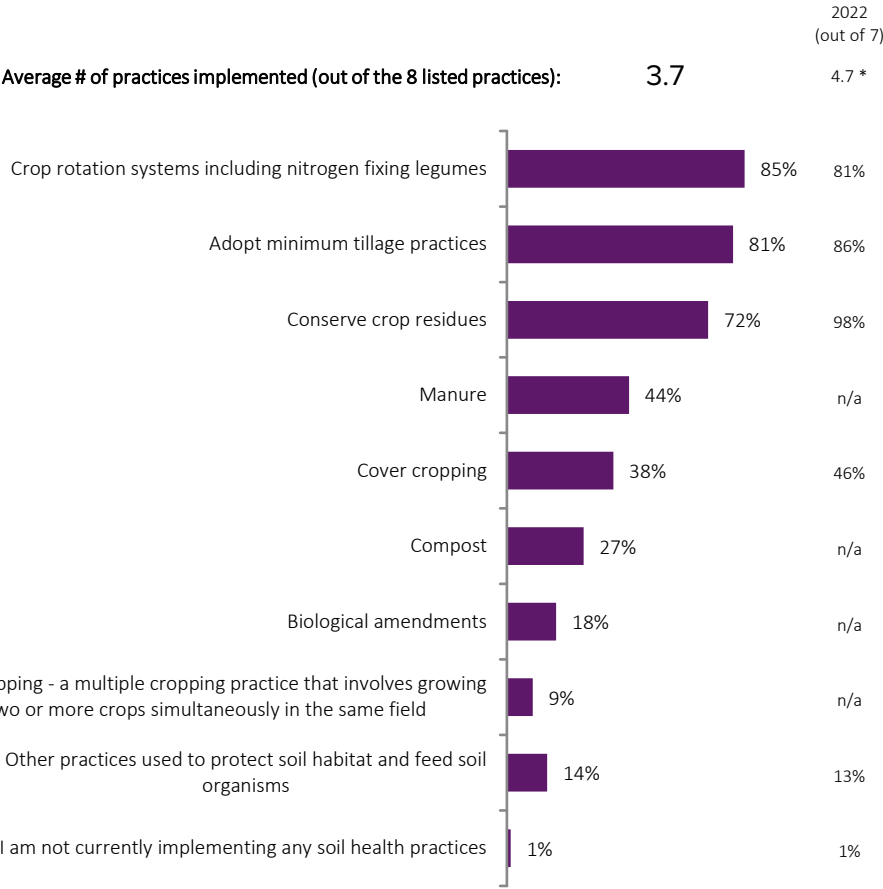
IPM and Crop Protection

IPM and Crop Protection

Practices on-farm to support soil life

The principles that support soil life are to protect soil habitat and feed soil organisms. Which of the following soil health practices do you currently use on your farm? Please select all that apply.

Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Average # of practices implemented	3.7	4.2	3.7	3.8	2.9	3.8	3.6	3.9	3.6
Crop rotation systems	83%	86%	88%	90%	82%	72%	86%	86%	81%
Adopt minimum tillage practices	72%	93%	81%	89%	86%	69%	65%	88%	87%
Conserve crop residues	67%	76%	72%	76%	50%	72%	75%	71%	69%
Manure	39%	62%	44%	36%	9%	75%	45%	42%	44%
Cover cropping	33%	48%	41%	34%	36%	33%	34%	40%	39%
Compost	28%	38%	19%	29%	5%	36%	25%	34%	19%
Biological amendments	17%	10%	16%	26%	5%	14%	14%	23%	13%
Intercropping	33%	10%	9%	3%	14%	8%	12%	8%	7%
Other practices	11%	14%	3%	16%	9%	25%	11%	18%	13%
I am not currently implementing	0%	0%	6%	0%	5%	0%	2%	1%	2%

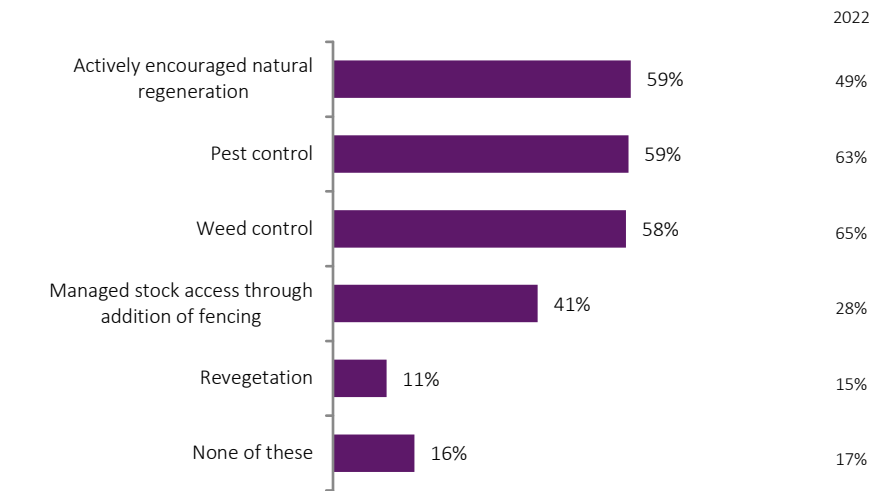
* In 2025, the answer options presented differed slightly (4 of the 8 practices differ to that asked in 2022).

Management activities in natural areas in the past 12 months

‘Natural areas’ are the non-cropping areas on a farm that have native vegetation. Riparian areas, wetlands, swamps, native vegetation plantings, woodlands and grasslands (often used for grazing) are typical natural areas found on cotton farms.

In natural areas on farm, what management activities have you undertaken in the past 12 months?
Please select all that apply.

Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Actively encouraged natural regeneration	67%	45%	75%	66%	45%	56%	52%	58%	70%
Pest control	72%	41%	69%	71%	73%	36%	35%	67%	72%
Weed control	56%	45%	53%	63%	64%	64%	51%	61%	63%
Managed stock access – fencing	33%	28%	56%	39%	55%	42%	22%	47%	52%
Revegetation	6%	7%	13%	19%	0%	8%	9%	12%	9%
None of these	6%	34%	16%	7%	14%	19%	31%	11%	7%

Do you have a riparian area on your property? *

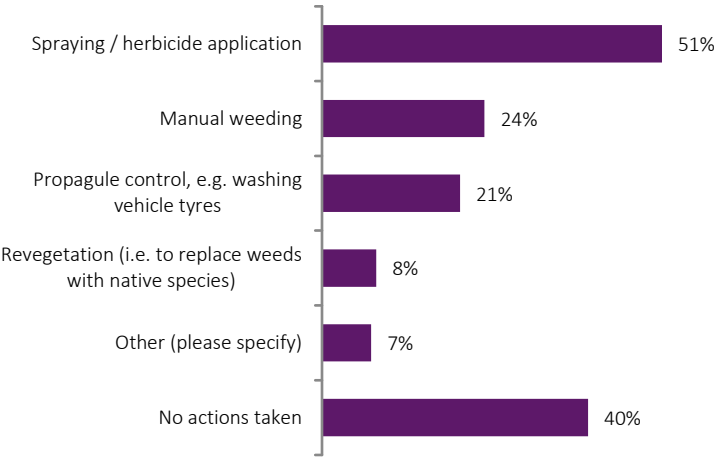
Base: All growers; n = 216



Of the 63% or n = 136 who reported having a riparian area on their property...

Do you currently take any management actions to manage riparian weeds (i.e. weeds growing in areas of natural vegetation near watercourses, wetlands or on floodplains) on your property? Please select all that apply. *

Base: All growers who reported having a riparian area on their property; n = 136



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes, have a riparian area	83%	52%	72%	74%	59%	44%	35%	73%	78%
No, do not	17%	48%	28%	26%	41%	56%	65%	27%	22%

Key results by Region and Size of Total Farm Area

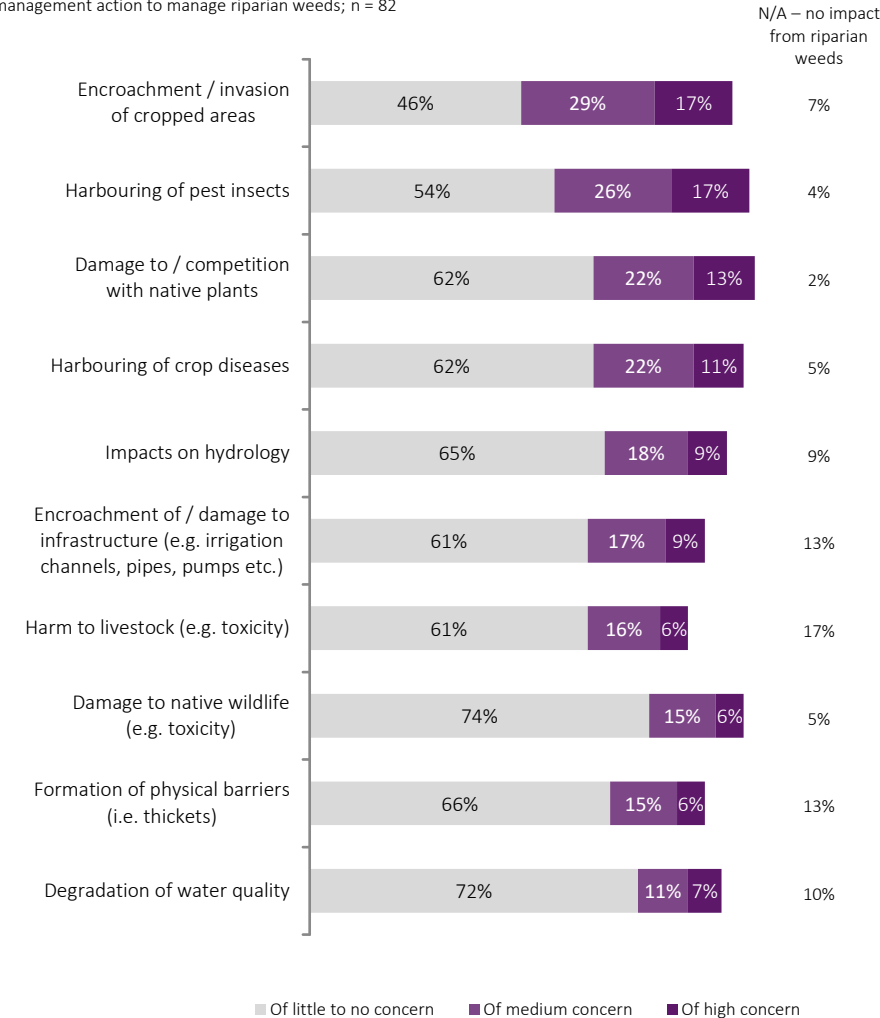
	Central QLD (n=15)	Darling Downs (n=15)	Macintyre Balonne (n=23)	Northern NSW (n=52)	Macquarie (n=13)	Southern NSW (n=16)	Small (n=23)	Medium (n=71)	Large (n=42)
Spraying / herbicide application	60%	53%	35%	52%	62%	44%	61%	46%	52%
Manual weeding	27%	40%	22%	23%	23%	19%	30%	17%	33%
Propagule control	27%	20%	22%	19%	23%	19%	13%	18%	29%
Revegetation	0%	0%	13%	12%	8%	6%	0%	11%	7%
Other	0%	13%	4%	8%	8%	6%	9%	8%	5%
No actions taken	33%	47%	48%	33%	38%	56%	35%	42%	38%

* Question is new to the 2025 research.

IPM and Crop Protection

Concern about the impacts of riparian weeds

Are you concerned about the impacts of riparian weeds on your property?
 Please tell us your level of concern with the following impacts. *
 Base: All growers who reported having a riparian area on their property AND currently take any management action to manage riparian weeds; n = 82



Key results by Region and Size of Total Farm Area (% medium + high concern)

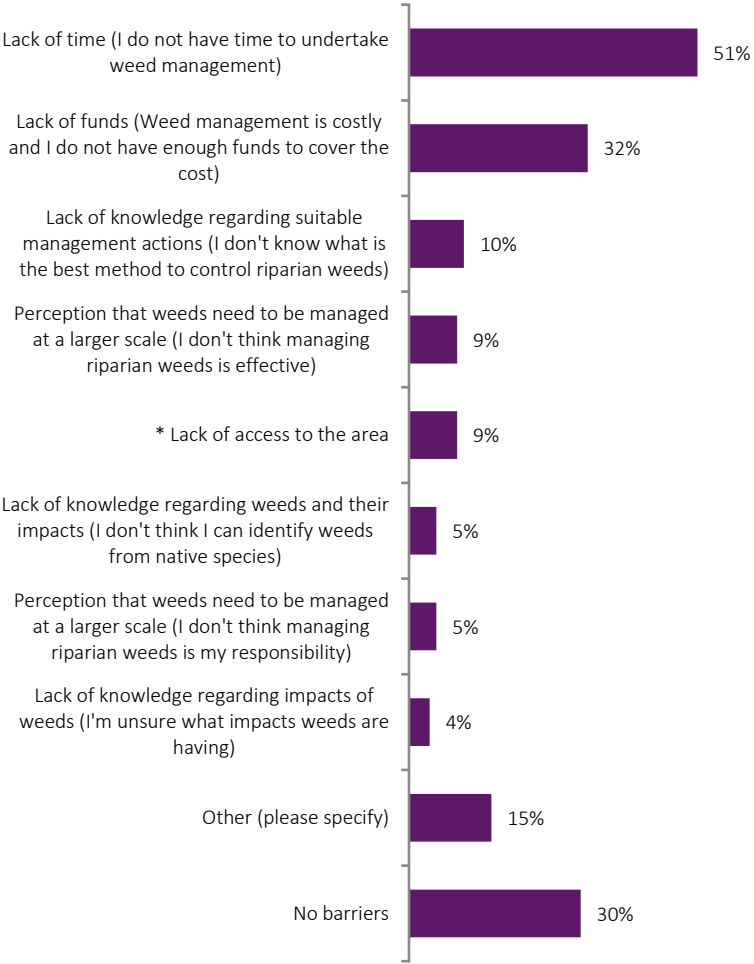
	Central QLD (n=10)	Darling Downs (n=8)	Macintyre Balonne (n=12)	Northern NSW (n=35)	Macquarie (n=8)	Southern NSW (n=7)	Small (n=15)	Medium (n=41)	Large (n=26)
Encroachment / invasion of cropped areas	30%	50%	67%	49%	50%	29%	67%	37%	50%
Harbouring of pest insects	50%	25%	33%	54%	25%	29%	47%	34%	54%
Damage to / competition with native plants	30%	25%	67%	29%	38%	43%	33%	34%	38%
Harbouring of crop diseases	20%	25%	25%	34%	50%	57%	20%	37%	35%
Impacts on hydrology	20%	25%	25%	20%	63%	43%	20%	34%	19%
Encroachment / damage to infrastructure	30%	25%	25%	23%	38%	29%	40%	20%	27%
Harm to livestock (e.g. toxicity)	10%	0%	33%	26%	25%	29%	7%	27%	23%
Damage to native wildlife (e.g. toxicity)	10%	0%	33%	26%	25%	14%	0%	22%	31%
Formation of physical barriers (i.e. thickets)	20%	0%	50%	14%	38%	14%	7%	24%	23%
Degradation of water quality	10%	0%	25%	17%	50%	14%	7%	24%	15%

* Question is new to the 2025 research.

Main barriers from taking action to manage riparian weeds

What are the main barriers preventing you from taking action to manage riparian weeds on your property? Please select all that apply. *

Base: All growers who reported having a riparian area on their property AND currently take any management action to manage riparian weeds; n = 82

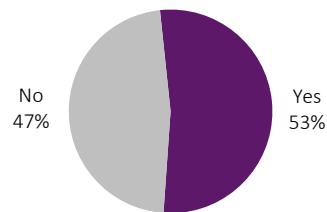


Key results by Region and Size of Total Farm Area

	Central QLD (n=10)	Darling Downs (n=8)	Macintyre Balonne (n=12)	Northern NSW (n=35)	Macquarie (n=8)	Southern NSW (n=7)	Small (n=15)	Medium (n=41)	Large (n=26)
Lack of time	50%	63%	42%	60%	50%	14%	73%	44%	50%
Lack of funds	30%	25%	33%	34%	38%	29%	27%	32%	35%
Lack of knowledge regarding suitable management actions	10%	25%	0%	6%	25%	14%	20%	10%	4%
Perception - don't think managing riparian weeds is effective	0%	0%	0%	11%	25%	0%	13%	5%	12%
† Lack of access	10%	0%	0%	14%	0%	0%	20%	2%	12%
Lack of knowledge regarding weeds and their impacts	10%	0%	0%	3%	13%	14%	7%	5%	4%
Perception - don't think managing riparian weeds is my responsibility	0%	0%	8%	6%	13%	0%	0%	7%	4%
Lack of knowledge regarding impacts of weeds	10%	0%	0%	3%	13%	0%	7%	2%	4%
Other	10%	0%	33%	11%	38%	0%	13%	24%	0%
No actions taken	50%	38%	25%	20%	13%	71%	20%	27%	42%

* Question is new to the 2025 research.
† Coded from Other (please specify) answers.

Have you ever accessed the WAND spray hazardous inversion system website? (www.wand.com.au)
Base: All growers; n = 217

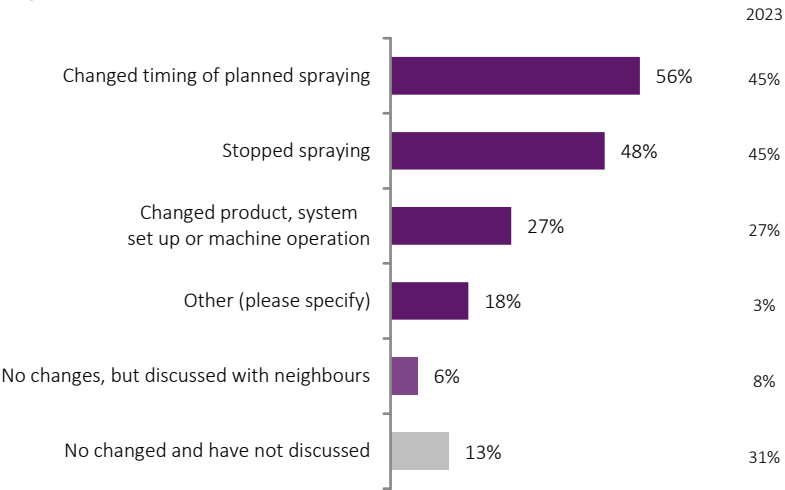


2023:

Yes
44%

Of the **53%** or n = 114 who having accessed the WAND spray hazardous inversion system website...

Have you made a change due to the WAND spray hazardous inversion information?
Please select all that apply.
Base: All growers who have accessed WAND; n = 114



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
% accessed WAND	22%	34%	50%	64%	77%	58%	31%	58%	70%

Key results by Region and Size of Total Farm Area

	Central QLD (n=4)	Darling Downs (n=10)	Macintyre Balonne (n=16)	Northern NSW (n=45)	Macquarie (n=17)	Southern NSW (n=21)	Small (n=20)	Medium (n=56)	Large (n=38)
Changed timing	50%	60%	63%	62%	41%	52%	65%	55%	53%
Stopped spraying	50%	60%	50%	56%	29%	43%	55%	45%	50%
Changed product, set up or operation	0%	50%	44%	22%	18%	29%	25%	29%	26%
Other	0%	0%	19%	18%	24%	19%	5%	16%	26%
No, but discussed with neighbours	0%	0%	6%	4%	6%	14%	10%	7%	3%
No, not discussed	25%	30%	13%	7%	18%	14%	20%	13%	11%

Which of the following diseases did you have on-farm during the 2024-25 cotton growing season?
If you had a disease on-farm, please provide your best estimate of the yield loss (in bales per hectare).
Base: All growers who grew cotton during the 2024-25 season; n = 200

	Yes, on farm	Mean estimate of yield loss <i>(of those who could provide an estimate)</i>	Not on farm	Don't know
Verticillium Wilt	38% 2024: 32%	0.93 bales/ha <i>(n = 52)</i>	62%	1%
Black Root Rot	26% 2024: 24%	1.00 bales/ha <i>(n = 37)</i>	74%	0%
Fusarium Wilt	23% 2024: 17%	0.62 bales/ha <i>(n = 24)</i>	77%	1%
Alternaria Leaf Spot	19% 2024: 19%	0.09 bales/ha <i>(n = 20)</i>	78%	3%
Reoccurring Wilt	6% 2024: 3%	0.25 bales/ha <i>(n = 5)</i>	92%	3%

Of the **59%** or n = 117 who reported at least
one of the five listed diseases on-farm. . .
2024: 52%

Key results by Region and Size of Total Farm Area (% yes, on farm)

	Central QLD (n=16)	Darling Downs (n=27)	Macintyre Balonne (n=30)	Northern NSW (n=62)	Macquarie (n=22)	Southern NSW (n=34)	Small (n=58)	Medium (n=91)	Large (n=51)
Verticillium Wilt	13%	26%	47%	66%	23%	18%	26%	37%	51%
Black Root Rot	31%	7%	23%	27%	27%	41%	14%	27%	37%
Fusarium Wilt	6%	33%	53%	19%	14%	15%	16%	24%	29%
Alternaria Leaf Spot	25%	4%	23%	23%	5%	26%	16%	16%	27%
Reoccurring Wilt	13%	7%	3%	10%	0%	0%	7%	5%	4%

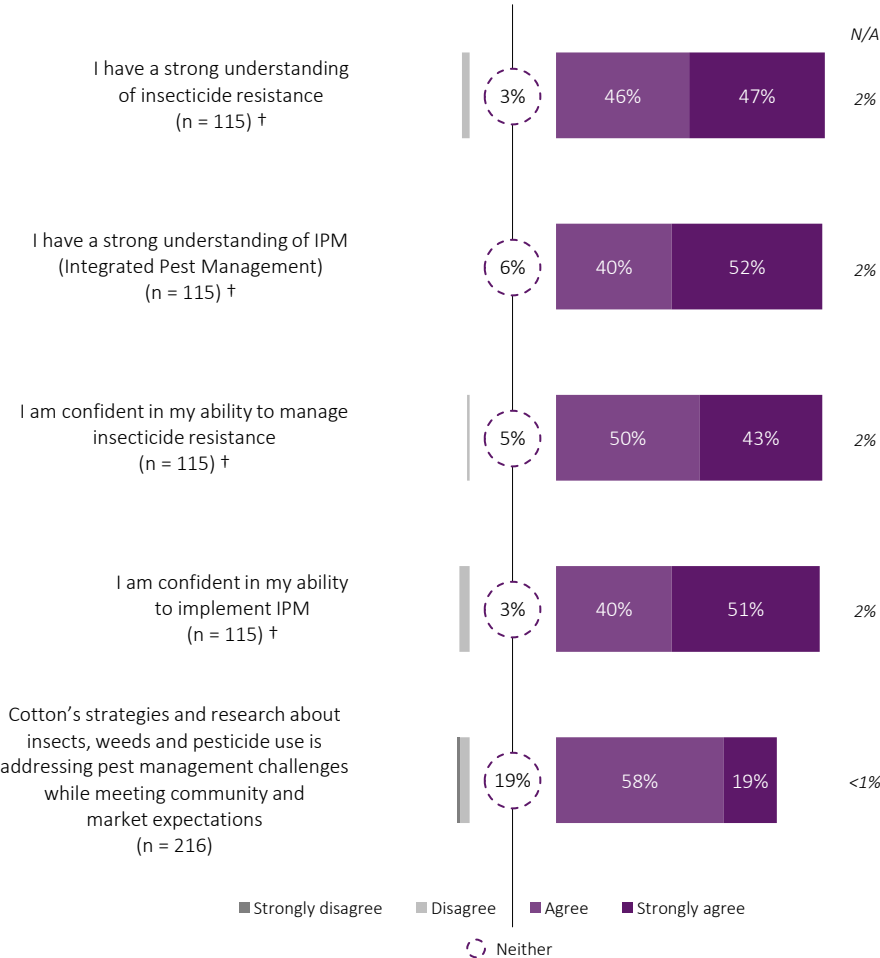
Can you describe what tactics you use to combat these diseases?
Base: All growers who reported at least one of the five listed diseases on-farm; n = 117

- 57% - Crop rotation (inc. changing crops, longer rotations)
- 15% - Cotton variety selection
- 11% - Use the recommended tactics / industry practice (NFI)
- 10% - Nothing / No action taken
- 10% - Fallow / we don't double crop
- 9% - Treatment / Apply chemicals / products
- 7% - Planting later / when it's warmer / until moisture is adequate
- 4% - Pre-irrigation / irrigation / delay in crop irrigation to reduce stress
- 3% - Soil testing
- 3% - Residue management / removal
- 3% - Minimal nitrogen inputs
- 3% - Best practice field management (e.g. water management, try and keep it all at one end, wash machinery down, contractors)
- 3% - Wash machinery

Agreement on statements about IPM

Please rate your level of agreement with the following statements: *
Base: All growers; n = 216. All growers (asked via rotation); n = 115.

Key results by Region and Size of Total Farm Area (% agree + % strongly agree)



	Central QLD	Darling Downs	Macintyre Balonne	Northern NSW	Macquarie	Southern NSW	Small	Medium	Large
I have a strong understanding of insecticide resistance †	100% (n = 9)	95% (n = 19)	100% (n = 14)	90% (n = 39)	92% (n = 12)	89% (n = 18)	88% (n = 33)	94% (n = 51)	97% (n = 31)
I have a strong understanding of IPM (Integrated Pest Management) †	100% (n = 9)	84% (n = 19)	93% (n = 14)	95% (n = 39)	92% (n = 12)	89% (n = 18)	82% (n = 33)	98% (n = 51)	94% (n = 31)
I am confident in my ability to manage insecticide resistance †	100% (n = 9)	89% (n = 19)	93% (n = 14)	92% (n = 39)	92% (n = 12)	89% (n = 18)	82% (n = 33)	96% (n = 51)	97% (n = 31)
I am confident in my ability to implement IPM †	100% (n = 9)	79% (n = 19)	100% (n = 14)	92% (n = 39)	92% (n = 12)	89% (n = 18)	76% (n = 33)	98% (n = 51)	97% (n = 31)
Cotton's strategies and research about insects, weeds and pesticide use...	78% (n = 18)	79% (n = 29)	72% (n = 32)	79% (n = 70)	73% (n = 22)	75% (n = 36)	78% (n = 65)	74% (n = 97)	78% (n = 54)

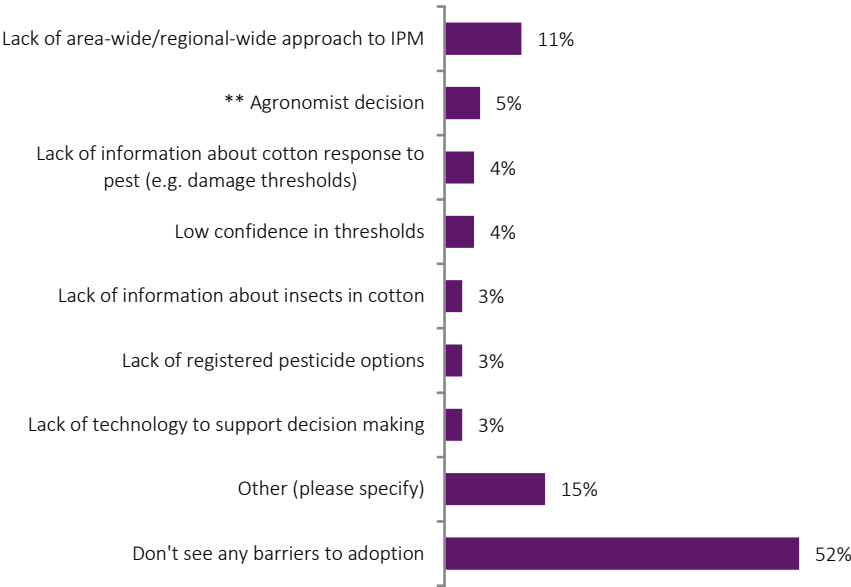
Result labels shown if 5% or greater.
* Question is new to the 2025 research.
† Question was asked on rotation to roughly 50% of respondents.

IPM and Crop Protection

Main barrier to adopting Integrated Pest/Resistance Management

What do you see as the main barrier to adopting Integrated Pest Management (IPM) and Insecticide Resistance Management? *

Base: All growers (asked via rotation); n = 115



Key results by Region and Size of Total Farm Area

	Central QLD (n=9)	Darling Downs (n=19)	Macintyre Balonne (n=14)	Northern NSW (n=39)	Macquarie (n=12)	Southern NSW (n=18)	Small (n=33)	Medium (n=51)	Large (n=31)
Lack of area-wide approach	0%	11%	0%	3%	0%	0%	6%	2%	0%
** Agronomist decision	0%	5%	0%	3%	8%	11%	6%	6%	0%
Lack of info about response to pest	0%	5%	7%	3%	0%	0%	6%	0%	3%
Low confidence in thresholds	0%	5%	14%	0%	0%	0%	3%	2%	3%
Lack of information about insects	11%	5%	0%	5%	0%	6%	6%	4%	3%
Lack of registered pesticide options	11%	11%	7%	15%	8%	6%	15%	12%	6%
Lack of technology to support decisions	0%	11%	0%	3%	8%	11%	3%	8%	3%
Other	33%	16%	14%	21%	8%	0%	12%	12%	23%
Don't see any barriers to adoption	44%	32%	57%	49%	67%	67%	42%	55%	58%

* Question is new to the 2025 research.
** Coded from Other (please specify) answers.
† Question was asked on rotation to roughly 50% of respondents.



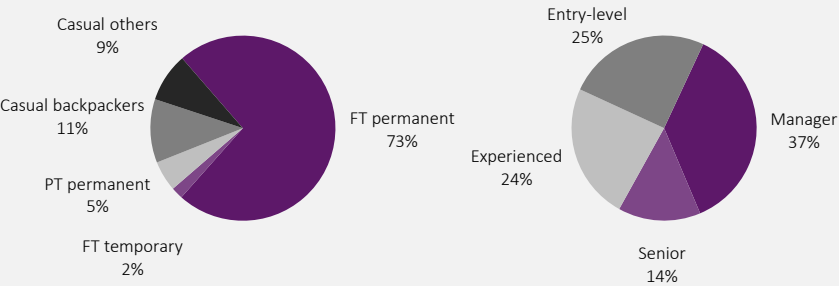
FOCUS AREA

Workforce

Number of people in workforce

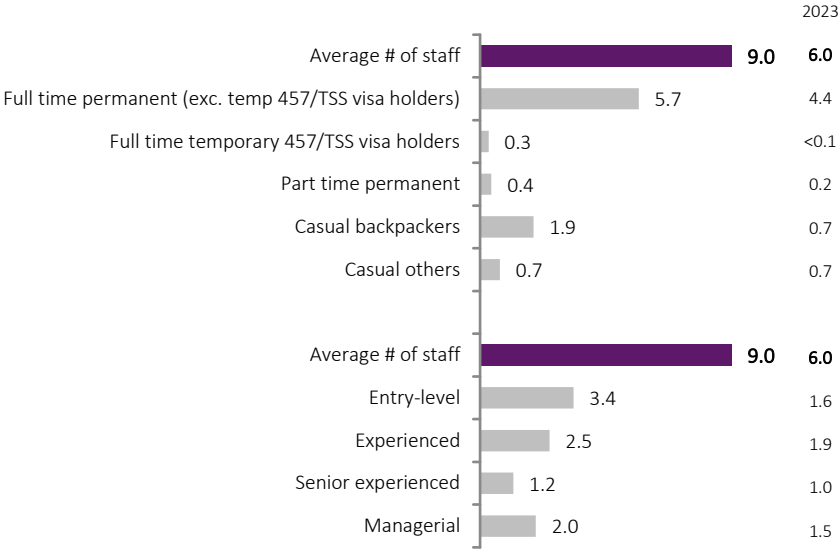
The 2025 CRDC Grower Survey again measured the average workforce of their cotton-growing business by several categories, along with questions about new staff and workforce vacancies. Some of the key results were that:

- Growers reported an average workforce (including grower and family staff) of 3.6 staff (small-sized farms), 6.8 staff (medium-sized farms) and 19.4 staff (large-sized farms).
- There is volatility in the estimates of workforce size over time – this is likely due to a number of factors, including (for example) decisions around crop selection (both choosing cotton as well as expanding or reducing their cotton crop), decisions around crop rotation, fallow, etc.
- However, a standardised estimate across farm size (calculated as the number of staff employed per 1,000 hectares) was 4.0 staff per 1,000 hectares. This compares to 4.4 staff employed per 1,000 hectares in the 2023 Grower Survey and 3.9 staff employed per 1,000 hectares.



Thinking specifically about your cotton-growing business, on the 1st JANUARY 2025, how many people were employed in each of the following positions on your farm? Include yourself and family but exclude gin staff.

Base: All growers; n = 214 (n = 2 could not provide an answer)



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=69)	Macquarie (n=22)	Southern NSW (n=35)	Small (n=63)	Medium (n=97)	Large (n=54)
Average # of staff	7.1	5.0	16.5	9.6	7.7	7.0	3.6	6.8	19.4
Full time permanent	5.1	3.9	12.0	4.9	3.6	5.0	2.7	4.7	10.9
Full time temporary	0.0	0.0	0.3	0.4	0.2	0.5	<0.1	0.2	0.9
Part time permanent	0.1	0.4	0.9	0.3	0.7	0.2	0.2	0.4	0.7
Casual backpackers	1.5	0.3	2.6	3.0	2.3	0.5	0.3	0.8	5.9
Casual others	0.4	0.4	0.8	0.9	0.9	0.7	0.4	0.7	1.0
Average # of staff	7.1	5.0	16.5	9.6	7.7	7.0	3.6	6.8	19.4
Entry-level	1.9	1.4	5.4	4.4	3.5	2.1	1.0	1.8	8.9
Experienced	2.3	1.5	6.0	1.9	1.9	1.9	0.6	1.9	5.8
Senior experienced	0.9	0.6	2.3	1.2	0.6	1.2	0.6	1.1	2.0
Managerial	1.9	1.5	2.9	2.1	1.8	1.8	1.4	1.9	2.8

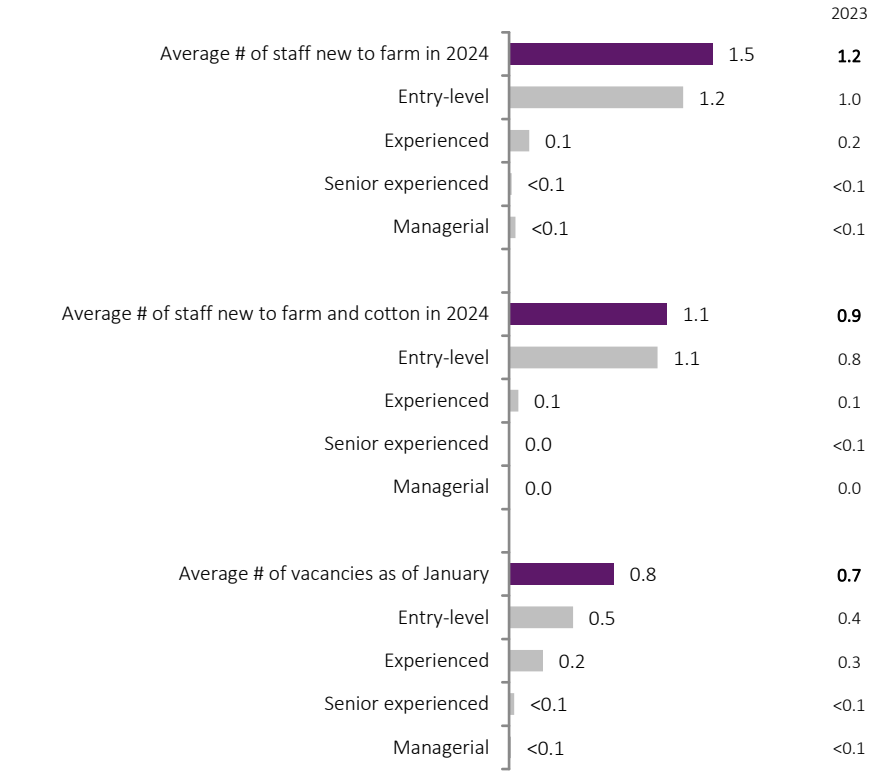
Definitions:
Entry-level e.g. assistant farm hand or driver who requires supervision or is inexperienced
Experienced e.g. experienced farm hand or machinery operator
Senior experienced e.g. a supervisor
Managerial e.g. farm manager, on-farm agronomist

New staff and vacancies in workforce

When considering your cotton farm workforce in January 2025, can you please answer the following for each type of position:

Base: All growers; n = 214 (n = 2 could not provide an answer)

Key results by Region and Size of Total Farm Area



	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=69)	Macquarie (n=22)	Southern NSW (n=35)	Small (n=63)	Medium (n=97)	Large (n=54)
Average # of staff	1.2	0.7	1.8	2.0	1.4	1.0	0.4	1.0	3.5
Entry-level	0.9	0.4	1.7	1.7	1.2	0.8	0.3	0.7	3.4
Experienced	0.3	0.2	0.1	0.1	0.1	0.2	0.1	0.2	0.1
Senior experienced	0.0	0.0	0.0	<0.1	0.0	<0.1	<0.1	<0.1	<0.1
Managerial	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.1	<0.1
Average # of staff	1.2	0.4	1.2	1.7	1.0	0.6	0.3	0.6	2.9
Entry-level	0.8	0.3	1.2	1.7	1.0	0.5	0.3	0.6	2.9
Experienced	0.3	0.1	0.0	<0.1	0.0	0.1	0.1	0.1	<0.1
Senior experienced	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Managerial	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Average # of staff	0.6	0.2	1.5	1.2	0.3	0.2	0.2	0.3	2.2
Entry-level	0.0	0.1	0.6	0.9	0.2	0.1	0.1	0.2	1.4
Experienced	0.6	<0.1	0.7	0.2	0.1	<0.1	<0.1	0.2	0.6
Senior experienced	0.0	0.0	0.2	<0.1	0.0	0.0	0.0	0.0	0.1
Managerial	0.0	0.0	<0.1	<0.1	0.0	<0.1	0.0	0.0	0.1

Definitions:
Entry-level e.g. assistant farm hand or driver who requires supervision or is inexperienced
Experienced e.g. experienced farm hand or machinery operator
Senior experienced e.g. a supervisor
Managerial e.g. farm manager, on-farm agronomist

A row of young plants with green leaves and thin stems grows in a field. The image is overlaid with a semi-transparent purple filter. A horizontal dashed white line spans the width of the image, passing through the middle of the plants. The text 'FOCUS AREA' is positioned to the left of this line, and 'Sustainability' is to the right.

FOCUS AREA

Sustainability

PLANET. PEOPLE. Paddock. is the Australian cotton industry’s sustainability framework introduced in 2020. Through a process of stakeholder consultation and review, eight environmental, economic and social sustainability topics have been assessed as being most important to cotton growers and stakeholders inside and outside the industry.

Growers in the 2025 survey were asked about the importance of the “PLANET. PEOPLE. Paddock.” sustainability program. This measure was also included in the 2021 and 2020 survey.

The feedback shows that almost one in two (49%) of growers reported being aware of the program. Awareness of the program has grown steadily with the 2021 result reported at 46%, and the 2023 result at 32%.

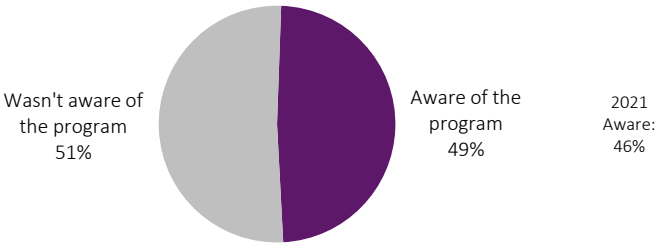
Of the one in two growers who were aware of the program, these growers rated their importance of the program at 3.8 (out of 5), a result consistent with the 2021 (3.9) and 2020 (3.8) results, confirming that growers who are aware of “PLANET. PEOPLE. Paddock.” acknowledge an importance of the program to the industry. Among this cohort of growers:

- 59% of growers rated the importance at 4 or higher;
- 9% of growers rated the importance a 1 or 2. Understanding the reasons for these lower ratings might be useful to help ensure there is stronger traction among growers who are aware of the program.

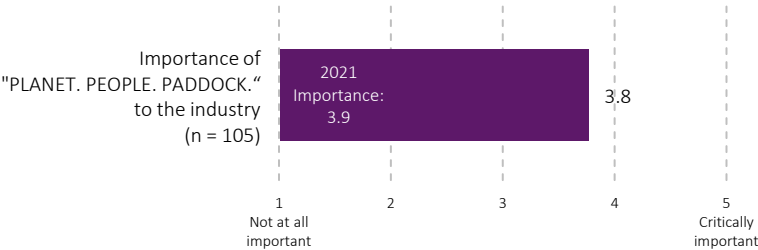
There is still a significant cohort of growers (51%) who indicated they are unaware of the sustainability program.

How important is cotton’s “PLANET. PEOPLE. Paddock.” sustainability program to the industry?

Base: All growers; n = 216



Of those aware of the program...



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Aware of the program	61%	48%	44%	49%	50%	47%	49%	53%	41%

Key results by Region and Size of Total Farm Area

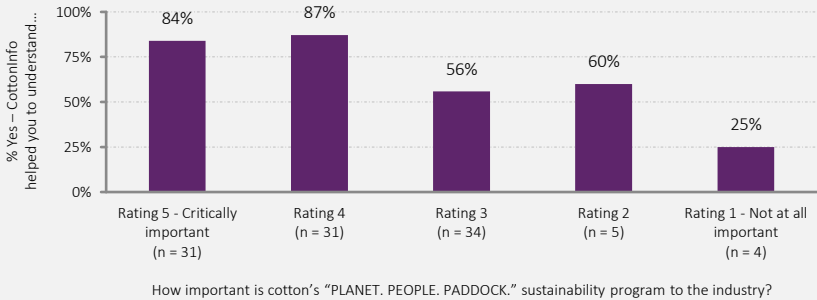
	Central QLD (n=11)	Darling Downs (n=14)	Macintyre Balonne (n=14)	Northern NSW (n=34)	Macquarie (n=11)	Southern NSW (n=17)	Small (n=32)	Medium (n=51)	Large (n=22)
Importance of "PLANET. PEOPLE. Paddock." to the industry	3.5	4.0	3.4	3.9	3.7	3.8	3.8	3.7	3.9

Alignment of myBMP and PLANET. PEOPLE. Paddock.

Growers who are aware of the “PLANET. PEOPLE. Paddock.” sustainability program were then asked if CottonInfo has helped them to understand how myBMP (the voluntary farm and environmental management system) aligns with the “PLANET. PEOPLE. Paddock.” sustainability program.

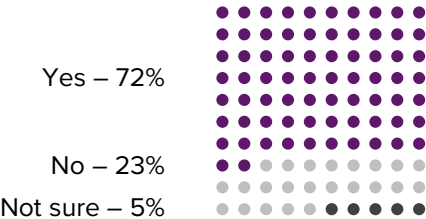
Results show that just under three in four (72%) reported that CottonInfo has helped them to understand this alignment. The incidence of growers reporting this is stronger when they also think that the “PLANET. PEOPLE. Paddock.” sustainability program is important to the industry – of those rating the importance at a 4 or 5 out of 5, 85% said that CottonInfo has helped them to understand the alignment.

Results do vary slightly across both regions (rating as low as 64% Yes for Central QLD and as high as 86% for Darling Downs and Macintyre-Balonne) and farm size (65% for medium-sized farms, 82% for large-sized farms).



Has CottonInfo helped you to understand how myBMP aligns with the Australian cotton industry sustainability framework, PLANET.PEOPLE.Paddock? *

Base: All growers who are aware of the “PLANET. PEOPLE. Paddock.” sustainability program; n = 105



Key results by Region and Size of Total Farm Area

	Central QLD (n=11)	Darling Downs (n=14)	Macintyre Balonne (n=14)	Northern NSW (n=34)	Macquarie (n=11)	Southern NSW (n=17)	Small (n=32)	Medium (n=51)	Large (n=22)
Yes	64%	86%	86%	65%	82%	65%	78%	65%	82%
No	36%	7%	14%	29%	18%	29%	16%	31%	14%
I'm not sure	0%	7%	0%	6%	0%	6%	6%	4%	5%

* Question is new to the 2025 research.

A photograph of a row of young plants, possibly seedlings, growing in a field. The plants are small with green leaves and thin stems. The background is a soft, out-of-focus landscape. The entire image is overlaid with a semi-transparent purple filter. A horizontal dashed white line runs across the middle of the image, starting from the text 'FOCUS AREA' on the left and extending to the right.

FOCUS AREA

Technology

Technology

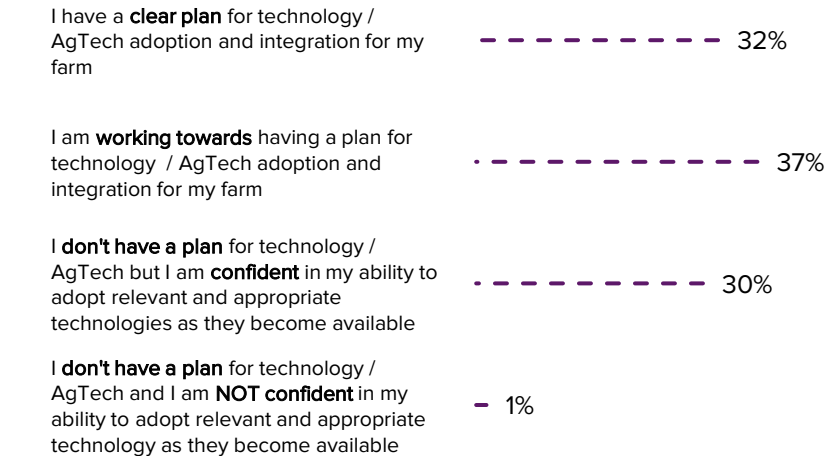
Adopting and integrating technology / AgTech on-farm

Growers were asked to select which description best aligns with how they adopt and integrate technology / AgTech on their farm. Note: this question was initially asked differently (“Do you have a technology or AgTech strategy for your business?”), however early responses indicated the question was unclear and needed further refinement. As a result, n = 205 growers (out of the survey total of n = 216) responded to this question.

Results from the 2025 survey indicate growers are split between their plan for technology / AgTech adoption and integration for their farm:

- Around one in three (32%) reported having a clear plan;
- Just over one in three (37%) were working towards having a plan; and
- Just under one in three (30%) said they don’t have a plan, but are confident in their ability to adopt relevant and appropriate technologies as they become available.

Which of the following describes how you adopt and integrate technology / AgTech on your farm? *
Base: All growers; n = 205 (question was amended after interviewing began)



Key results by Region and Size of Total Farm Area

	Central QLD (n=17)	Darling Downs (n=27)	Macintyre Balonne (n=29)	Northern NSW (n=69)	Macquarie (n=19)	Southern NSW (n=36)	Small (n=60)	Medium (n=92)	Large (n=53)
I have a clear plan ...	41%	37%	41%	30%	32%	22%	30%	29%	40%
I am working towards ...	35%	22%	31%	36%	63%	39%	32%	45%	30%
Don't have a plan , but I am confident ...	24%	41%	21%	33%	5%	39%	37%	26%	28%
Don't have a plan , and I am NOT confident ...	0%	0%	7%	0%	0%	0%	2%	0%	2%

A photograph of a row of young plants, possibly seedlings, growing in a field. The plants are arranged in a line, and their leaves are visible. A dashed white line is drawn across the image, passing through the middle of the plants. The text "FOCUS AREA" is positioned to the left of this line, and "CRDC" is positioned to the right of the line.

FOCUS AREA

CRDC

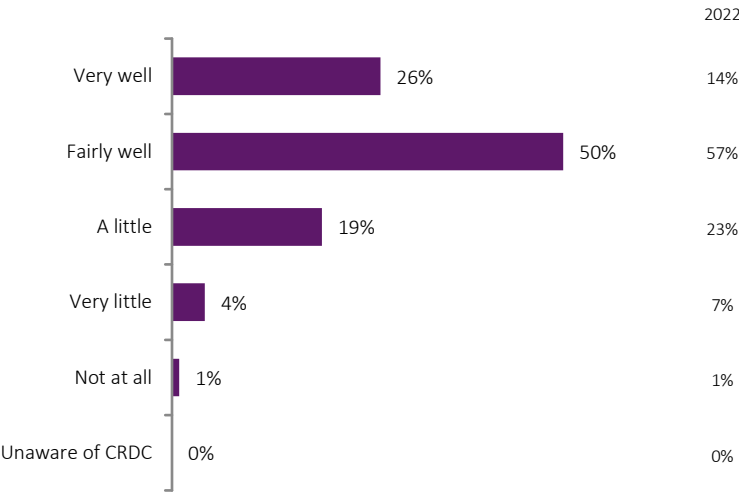
Understanding what CRDC does

The 2025 study collected feedback from growers about their engagement and experience with CRDC. The results from the 2025 Grower Survey show that:

- All growers completing the survey reported being aware of CRDC.
- The overwhelming majority of growers report being familiar with what CRDC does (76% understand what CRDC does very or fairly well). Importantly, only a small number of growers indicated low levels of familiarity. These results are largely consistent with the 2022 survey results.
- There remains about one in four (24%) who report they have ‘a little’, ‘very little’ or ‘not at all’ understanding of what CRDC does. This is a salient reminder that while the overall results continue to be positive, there will be a continuing need to keep all growers updated, informed and aware of the roles, responsibilities and outcomes achieved by CRDC.

How well would you say you understand what the Cotton Research and Development Corporation (CRDC) does?

Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Very well	33%	17%	34%	33%	23%	19%	20%	23%	41%
Fairly well	61%	62%	38%	46%	50%	44%	55%	47%	46%
A little	6%	14%	25%	20%	23%	25%	18%	25%	9%
Very little	0%	7%	3%	1%	5%	8%	6%	3%	4%
Not at all	0%	0%	0%	0%	0%	3%	0%	2%	0%
Unaware of CRDC	0%	0%	0%	0%	0%	0%	0%	0%	0%

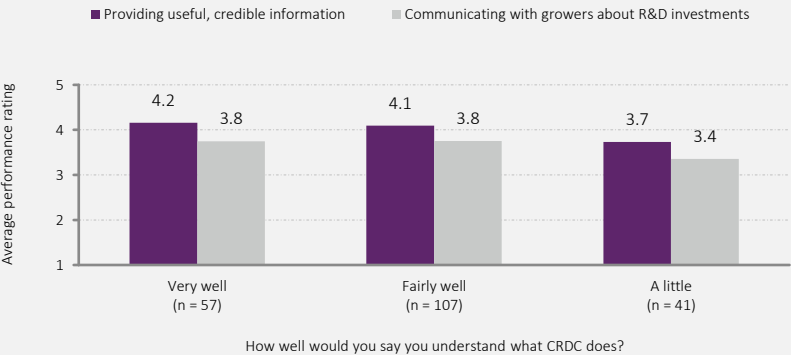
CRDC

CRDC's performance

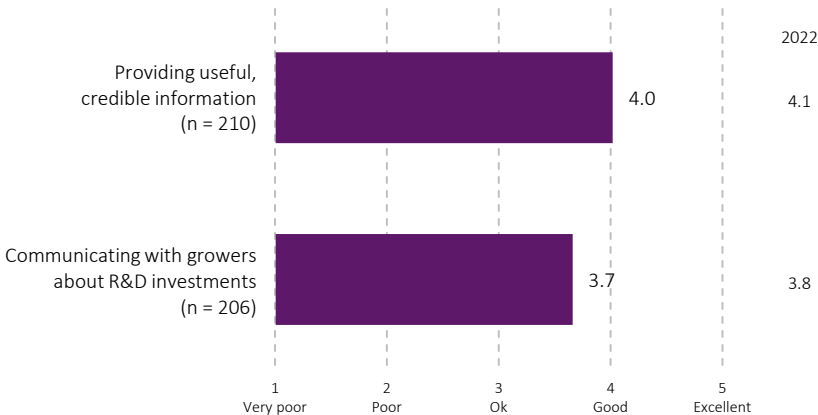
Growers also reported a strong assessment of CRDC in regard to:

- Providing useful, credible information (rating 4.0 out of a maximum rating of 5); and
- Communicating with growers about R&D investments (rating 3.7).

Pleasingly, these results are largely consistent across all regions and across farms of different sizes. That said, growers in Central QLD were somewhat more critical in their rating of “Communicating with growers about R&D investments”. It’s unclear what influences may have contributed to these growers’ assessment.



How would you rate CRDC's performance in:
Base: All growers (excluding “Don’t know” answers); n varies



Key results by Region and Size of Total Farm Area

	Central QLD (n=17)	Darling Downs (n=27)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=21)	Southern NSW (n=36)	Small (n=62)	Medium (n=96)	Large (n=52)
Providing useful, credible information	3.8	4.3	4.0	4.0	4.0	3.8	4.1	4.0	4.0

	Central QLD (n=17)	Darling Downs (n=27)	Macintyre Balonne (n=32)	Northern NSW (n=66)	Macquarie (n=21)	Southern NSW (n=35)	Small (n=63)	Medium (n=92)	Large (n=51)
Communicating with growers about R&D investments	3.3	4.0	3.6	3.6	3.6	3.6	3.7	3.6	3.7

Growers are overwhelmingly supportive of CRDC’s research investments and activities with:

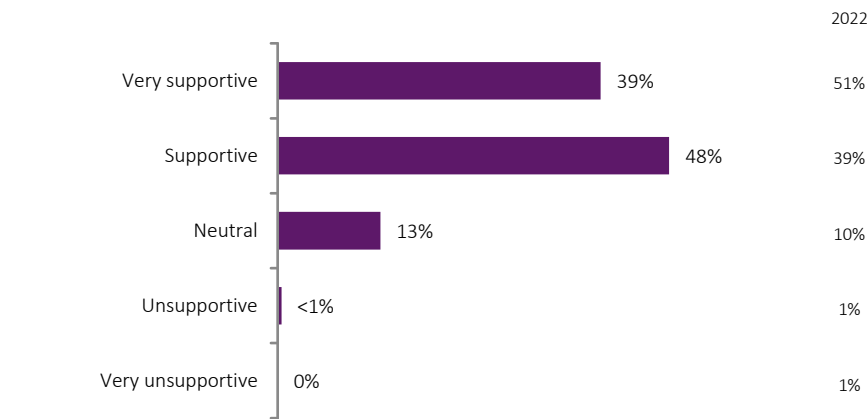
- Almost all growers indicated they were supportive of CRDC’s research investments and activities with:
 - Two in five (39%) of growers reporting they were ‘very supportive’; with
 - A further one in two (48%) describing themselves as ‘supportive’; and
 - No growers responding to the survey indicating they were not supportive.

Once again, the results are largely consistent across most regions (over one in five reported “neutral” for Central QLD) and across farms of different sizes.

The results indicate little change with those reported in 2022 – the overall support remains high, however there was a shift in the highest rating from “very supportive” in 2022 (51% said this) to “supportive” in 2025 (48% said this).

Overall, how supportive are you of CRDC’s research investments and activities?

Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Very supportive	28%	41%	44%	43%	32%	39%	34%	45%	35%
Supportive	50%	41%	50%	46%	55%	47%	52%	40%	56%
Neutral	22%	17%	6%	11%	9%	14%	14%	13%	9%
Unsupportive	0%	0%	0%	0%	5%	0%	0%	1%	0%
Very unsupportive	0%	0%	0%	0%	0%	0%	0%	0%	0%

CRDC

Sentiment about CRDC

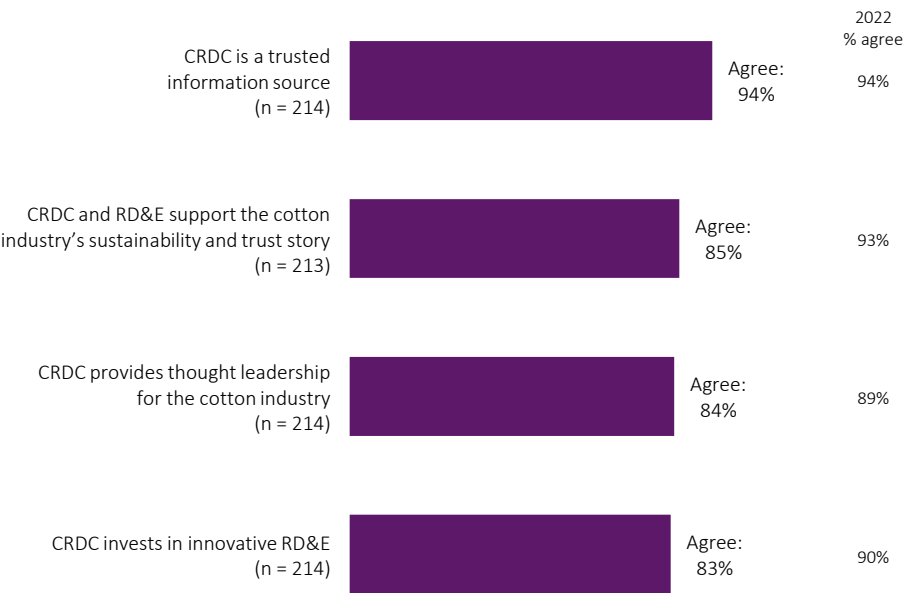
Growers were asked for a qualitative assessment of CRDC. The feedback from the 2025 Grower Survey shows that growers overwhelmingly agree that CRDC:

- Is a trusted information source;
- Supports the industry’s sustainability and trust story;
- Provides thought leadership for the industry; and
- Invests in innovative RD&E.

Whilst there has been a slight softening in agreeance for three of the four statements since 2022, these remain strong foundational elements for the healthy CRDC–grower relationship.

Thinking about CRDC, do you agree or disagree that...

Base: All growers (excluding “N/A” answers); n varies



Key results by Region and Size of Total Farm Area (% agree)

	Central QLD (n=18)	Darling Downs (n=28)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=21)	Southern NSW (n=36)	Small (n=64)	Medium (n=97)	Large (n=53)
CRDC is a trusted info source	100%	89%	91%	97%	90%	94%	92%	95%	94%

	Central QLD (n=18)	Darling Downs (n=28)	Macintyre Balonne (n=32)	Northern NSW (n=69)	Macquarie (n=21)	Southern NSW (n=36)	Small (n=64)	Medium (n=96)	Large (n=53)
CRDC/RD&E support sustainability/trust	89%	89%	81%	84%	86%	86%	92%	82%	83%

	Central QLD (n=18)	Darling Downs (n=28)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=21)	Southern NSW (n=36)	Small (n=64)	Medium (n=97)	Large (n=53)
CRDC provides thought leadership	94%	86%	81%	83%	86%	81%	88%	81%	85%

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=21)	Southern NSW (n=35)	Small (n=64)	Medium (n=97)	Large (n=53)
CRDC invests in innovative RD&E	72%	86%	91%	79%	81%	89%	86%	85%	77%



FOCUS AREA

CottonInfo

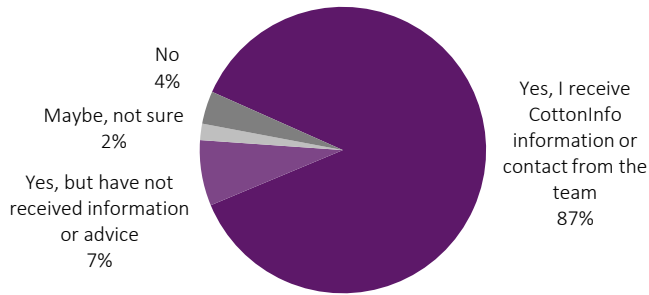
The results from the 2025 Grower Survey show that:

- The overwhelming majority of growers are aware of CottonInfo and receive information or contact from the CottonInfo team.
- Based on the feedback provided, CottonInfo is reaching almost nine in ten growers.
- Awareness of CottonInfo is consistent across all regions and farm sizes.

The results indicate most growers (87%) have had some level of engagement (receiving information or contact) with CottonInfo, a similar result to that reported in 2022 (84%).

Are you aware of CottonInfo - the cotton industry’s joint extension program (consisting of regional extension officers, technical leads and myBMP)?

Base: All growers; n = 216



	Yes, I receive info or contact from the team	Yes, but have not received info or advice	Maybe, not sure	No
2022	84%	8%	2%	8%

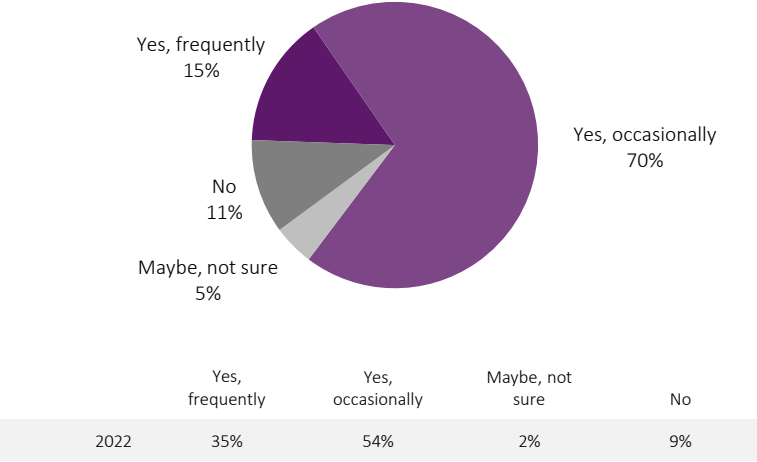
Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes, I receive info or contact from the team	100%	83%	78%	91%	82%	86%	89%	81%	94%
Yes, but have not received info or advice	0%	7%	6%	7%	14%	8%	3%	13%	2%
Maybe, not sure	0%	0%	6%	0%	5%	3%	0%	3%	2%
No	0%	10%	9%	1%	0%	3%	8%	2%	2%

Growers were asked to provide an assessment of the frequency with which they sourced information from CottonInfo. Results show that:

- Nearly all (85%) growers reported sourcing information from the CottonInfo team or their resources. This compares to 89% reported in 2022 and 86% in 2020. This overall use is consistent across all regions (ranging from 76% to 91%) and farm sizes (ranging from 83% to 88%).
- Whilst usage remains high, growers reported accessing info from the CottonInfo team or their resources less frequently (15% “Yes, frequently”) compared to 2022 results (35% “Yes frequently”).
- Further investigation into why growers are reporting a less frequent use of this information may be warranted.

Do you source information from the CottonInfo team or information resources (e.g. Cotton Pest Management Guide, Cotton Production Manual, myBMP, etc.)?
Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

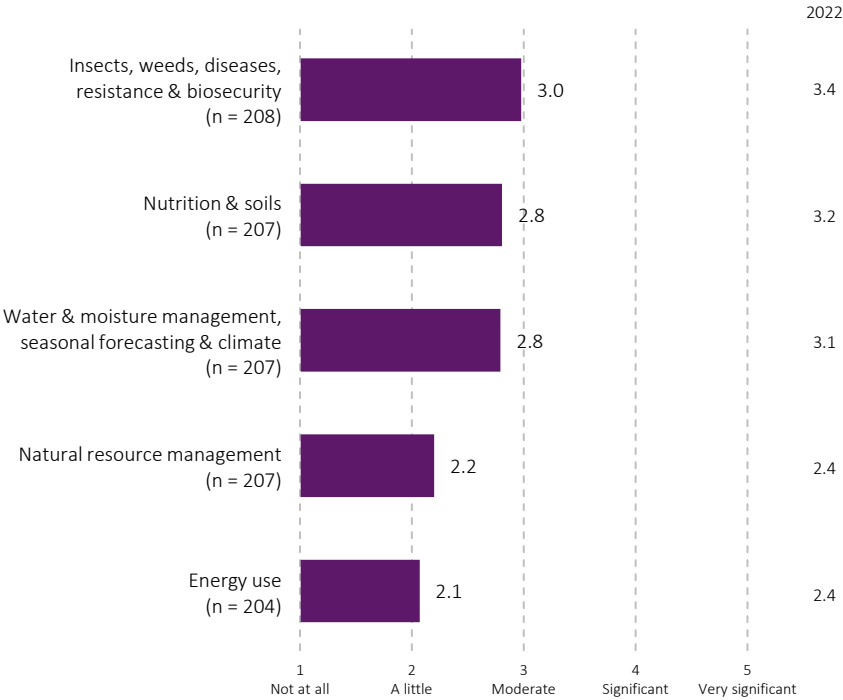
	Central QLD (n=18)	Darling Downs (n=29)	Macintyre Balonne (n=32)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=65)	Medium (n=97)	Large (n=54)
Yes, frequently	17%	10%	13%	21%	9%	8%	14%	10%	24%
Yes, occasionally	67%	66%	66%	70%	68%	78%	74%	73%	59%
Maybe, not sure	0%	7%	9%	4%	5%	3%	6%	3%	6%
No	17%	17%	13%	4%	18%	11%	6%	13%	11%

Growers were asked to provide an assessment of the resources and information CottonInfo provides in improving on-farm practices. The results show that:

- The strongest indication that these resources are assisting growers were across three key areas: insects, weeds, diseases, resistance & biosecurity; nutrition & soils; and water & moisture management, seasonal forecasting & climate.
- There were lower ratings on the improvements offered of the resources relating to natural resource management and energy use. This pattern across all areas is consistent with those reported in 2022.
- Results across all five areas in 2025 were lower than the ratings achieved in 2022.

To what degree have the CottonInfo team, information resources and myBMP assisted you to improve practices on your farm in relation to...

Base: All growers (excluding "N/A, not needed" answers); n varies



Key results by Region and Size of Total Farm Area

	Central QLD (n=18)	Darling Downs (n=27)	Macintyre Balonne (n=29)	Northern NSW (n=67)	Macquarie (n=22)	Southern NSW (n=36)	Small (n=62)	Medium (n=93)	Large (n=53)
Insects, weeds, diseases, resistance & biosecurity	2.6	3.0	3.0	3.0	2.7	3.1	3.0	2.8	3.2
	(n=18)	(n=27)	(n=28)	(n=67)	(n=22)	(n=36)	(n=62)	(n=93)	(n=52)
Nutrition & soils	2.6	2.8	2.9	2.9	2.5	2.9	3.0	2.6	2.9
	(n=18)	(n=27)	(n=28)	(n=67)	(n=22)	(n=36)	(n=62)	(n=93)	(n=52)
Water & moisture management, seasonal forecasting & climate	2.6	3.0	2.9	2.8	2.5	2.8	2.8	2.7	2.9
	(n=18)	(n=27)	(n=28)	(n=67)	(n=22)	(n=36)	(n=62)	(n=93)	(n=52)
Natural resource management	2.1	2.2	2.6	2.2	2.0	2.1	2.2	2.1	2.4
	(n=18)	(n=25)	(n=28)	(n=67)	(n=22)	(n=35)	(n=61)	(n=91)	(n=52)
Energy use	2.1	1.9	2.3	2.0	2.0	2.1	2.0	2.0	2.2

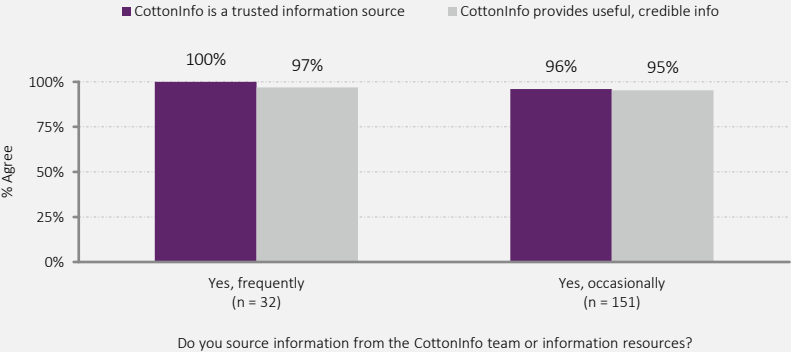
CottonInfo

Sentiment about CottonInfo

Growers were asked for a qualitative assessment of CottonInfo and the resources provided to cotton growers. The feedback shows that growers who do and don't source information from CottonInfo agree that:

- CottonInfo is a trusted information source (96% agree); and
- CottonInfo provides useful, credible information (93% agree).

While results are positive across all growers, the results look to be slightly stronger among the cohort who frequently access CottonInfo resources.



Thinking about CottonInfo, do you agree or disagree that...
Base: All growers (excluding "N/A" answers); n varies



Key results by Region and Size of Total Farm Area (% agree)

	Central QLD (n=18)	Darling Downs (n=27)	Macintyre Balonne (n=31)	Northern NSW (n=70)	Macquarie (n=22)	Southern NSW (n=35)	Small (n=63)	Medium (n=95)	Large (n=54)
CottonInfo is a trusted info source	83%	96%	100%	94%	95%	100%	94%	97%	96%
CottonInfo provides useful, credible info	83%	96%	97%	94%	91%	89%	94%	93%	93%

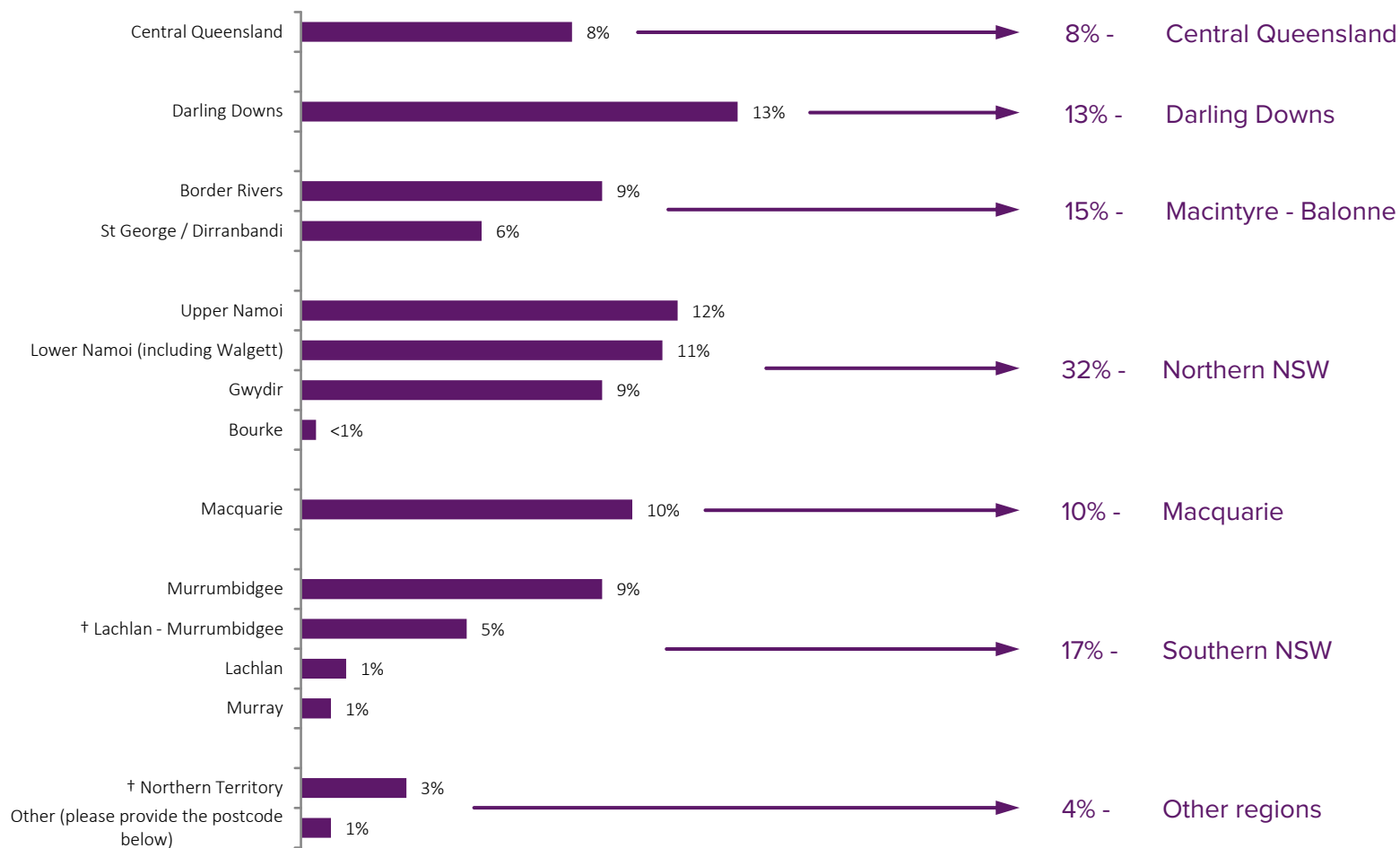


Appendices

Region of respondent

In which region are you located?

Base: All growers; n = 216

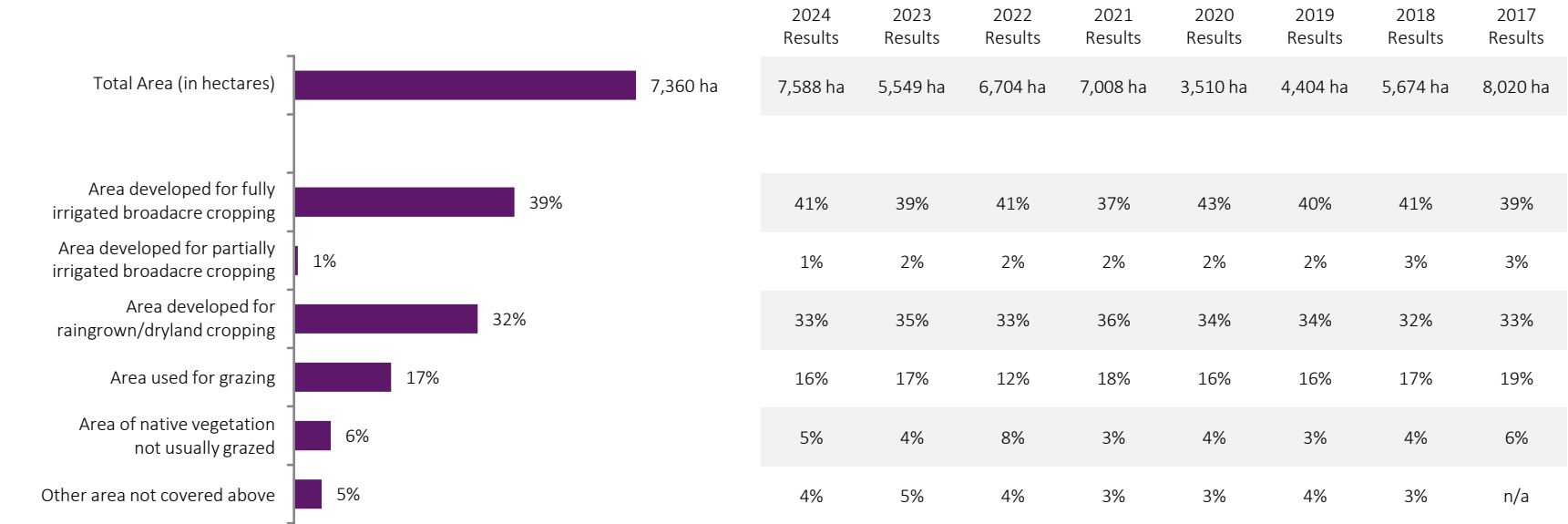


Appendices

Historical data of land area/distribution

What is the total area of your farm (in hectares), and of the total area of your farm, what is the area attributed to the following?

Base: All growers (excluding three outliers*); n = 213

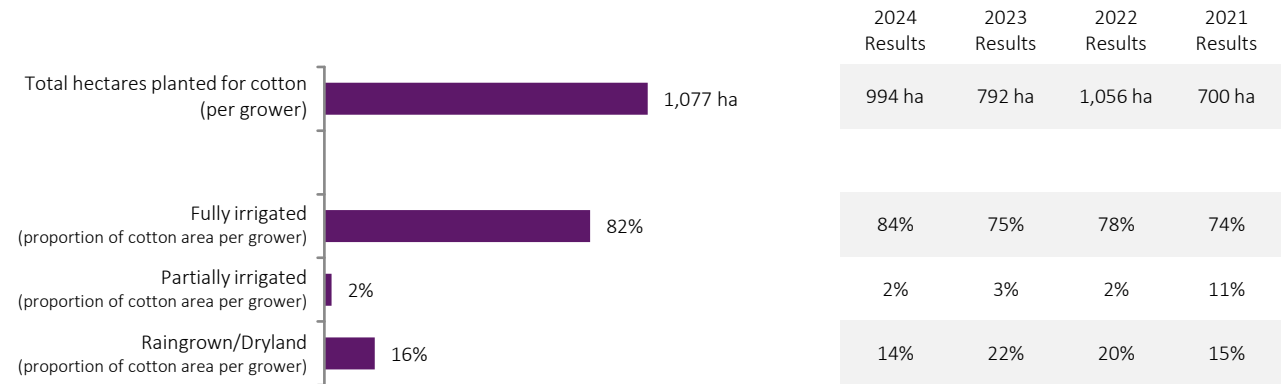


* Three outliers were removed from this analysis for having a significantly different farm size to the rest of the respondent base (400,000 or larger, next highest reported figures were 80,000, 80,000, and 77,670).

Cotton Research & Development Corporation – 2025 Grower Survey

Historical data of cotton area and fully irrigated yield

What was the total number of hectares planted for cotton during the 2024-25 cotton growing season?
And of these hectares, how many hectares were fully irrigated, partially irrigated or raingrown/dryland?
Base: All growers who grew cotton during the 2024-25 season; n = 200



What were your yields for the 2024-25 cotton growing season across the cotton areas?
Base: All growers who grew cotton during the 2024-25 season; n varies
(Fully Irrigated, n = 177, Raingrown/Dryland, n = 62)
Part irrigation not reported due to low sample size.

	Fully Irrigated (bales per ha)	2024 Results	2023 Results	2022 Results	2021 Results	2020 Results	2019 Results	2018 Results	2017 Results
Average yield	12.35	11.93	10.19	11.31	11.88	10.45	10.23	11.22	9.88
Yield achieved by your highest-yielding field (average of grower-reported yield)	14.11	13.57	11.96	13.03	13.13	11.55	11.95	12.61	11.07
Yield achieved by your lowest-yielding field (average of grower-reported yield)	10.24	10.13	8.19	9.09	10.38	9.24	8.53	9.46	8.22
Range of variation from average yield	3.87	3.44	3.77	3.94	2.74	2.31	3.42	3.15	2.85

Reliability of the Estimates

The estimates in this report are based on information obtained from a sample survey. Any data collection may encounter factors, known as non-sampling error, which can impact on the reliability of the resulting statistics. In addition, the reliability of estimates based on sample surveys are also subject to sampling variability. That is, the estimates may differ from those that would have been produced had all persons in the population been included in the survey.

Non-sampling error

Non-sampling error may occur in any collection, whether it is based on a sample or a full count such as a census. Sources of non-sampling error include non-response, errors in reporting by respondents or recording of answers by interviewers and errors in coding and processing data. Every effort is made to reduce non-sampling error by careful design of survey questionnaires and quality control procedures at all stages of data processing.

Sampling error

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of persons was included. There are about two chances in three (67%) that a sample estimate will differ by less than one SE from the number that would have been obtained if all persons had been surveyed, and about 19 chances in 20 (95%) that the difference will be less than two SEs.

Calculation of Confidence Interval

If 50% of all the people in a population of 20,000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes".

The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to be more than the margin of error away from the true answer.

When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer.

In terms of the numbers selected above, the margin of error *MoE* is given by:

$$MoE = z * \sqrt{\frac{\hat{p}(1 - \hat{p})}{n}}$$

where *n* is the sample size, $\hat{p}$ is the fraction of responses that you are interested in, and *z* is the [critical value](#) for the 95% confidence level (in this case, 1.96).

This calculation is based on the [Normal distribution](#) and assumes you have more than about 30 samples.

Margin of Error for a given sample size and survey estimate		Sample Size											
		30	50	75	100	150	200 (# growers completed)	216 (# surveys completed)	250	300	500	1,000	1,500
Survey Estimate	10%	n/a	n/a	n/a	± 5.88%	± 4.80%	± 4.16%	± 4.00%	± 3.72%	± 3.39%	± 2.63%	± 1.86%	± 1.52%
	20%	n/a	± 11.09%	± 9.05%	± 7.84%	± 6.40%	± 5.54%	± 5.33%	± 4.96%	± 4.53%	± 3.51%	± 2.48%	± 2.02%
	30%	n/a	± 12.70%	± 10.37%	± 8.98%	± 7.33%	± 6.35%	± 6.11%	± 5.68%	± 5.19%	± 4.02%	± 2.84%	± 2.32%
	40%	± 17.53%	± 13.58%	± 11.09%	± 9.60%	± 7.84%	± 6.79%	± 6.53%	± 6.07%	± 5.54%	± 4.29%	± 3.04%	± 2.48%
	50%	± 17.89%	± 13.86%	± 11.32%	± 9.80%	± 8.00%	± 6.93%	± 6.67%	± 6.20%	± 5.66%	± 4.38%	± 3.10%	± 2.53%
	60%	± 17.53%	± 13.58%	± 11.09%	± 9.60%	± 7.84%	± 6.79%	± 6.53%	± 6.07%	± 5.54%	± 4.29%	± 3.04%	± 2.48%
	70%	n/a	± 12.70%	± 10.37%	± 8.98%	± 7.33%	± 6.35%	± 6.11%	± 5.68%	± 5.19%	± 4.02%	± 2.84%	± 2.32%
	80%	n/a	± 11.09%	± 9.05%	± 7.84%	± 6.40%	± 5.54%	± 5.33%	± 4.96%	± 4.53%	± 3.51%	± 2.48%	± 2.02%
	90%	n/a	n/a	n/a	± 5.88%	± 4.80%	± 4.16%	± 4.00%	± 3.72%	± 3.39%	± 2.63%	± 1.86%	± 1.52%

Note. Margin of Errors are provided at the 95% confidence level on the assumption of a large population size (non-finite) and normally distributed. Results labelled "n/a" are due to the assumption of the normal distribution not being upheld ($n\hat{p} < 10$ or $n(1-\hat{p}) < 10$).

Objective The purpose of the CRDC Cotton Grower Survey is to capture valuable information about cotton farming practices to give a greater understanding of the industry’s current practices and performance – so that trends can be monitored over time, practice change can be accurately measured, and areas for improvement and further RD&E investment identified. The annual Survey also aims to capture important information about growers’ understanding and perception of cotton RD&E, led by CRDC.

Methodology The 2025 Grower Survey was conducted using a CATI (Computer Assisted Telephone Interviewing) data collection methodology. This included:

- Growers being contacted and invited to complete the survey over the phone;
- Where this was not possible immediately, an interview appointment time was agreed and the interview completed at the agreed time.

Sample In total, a sample of n = 749 businesses was provided by CRDC, with n = 216 surveys completed (completion rate of 28.8%). A breakdown of the number of surveys completed by Region is located below.

Region	Sample Size	Completed Surveys	Region	Sample Size	Completed Surveys
Overall	749	216	Northern NSW	242	70
Central Queensland	61	18	Macquarie	69	22
Darling Downs	117	29	Southern NSW	125	36
Macintyre – Balonne	80	32	Other	55	9

Questionnaire Growers were asked to complete a 27-minute survey which covered a range of topics related to their cotton growing experience both on and off-farm. Key areas of interest included:

- Farm profiles
- 2024-25 cotton crop
- Water
- Energy
- R&D impact on farming systems
- Nutrition and soil

- IPM and crop protection
- Workforce
- Sustainability
- Technology
- CRDC and CottonInfo
- Voice of the grower

Please note that due to the length of the survey, a select few questions were presented on rotation to respondents to reduce the length of the survey.

Timing The survey was launched on 4 June 2025 and remained open until 24 June 2025.



Want more information?

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