

**A TIME SERIES  
OF THE  
AUSTRALIAN COTTON INDUSTRY  
1962 TO 2012**

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**Industry &  
Investment**



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Disclaimer: The information contained in this publication is based on knowledge and understanding at the time of writing (2009). However, because of advances in knowledge, users are reminded of the need to ensure that information upon which they rely is up to date and to check currency of the information with the Cotton CRC or the users independent adviser.

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## **Introduction**

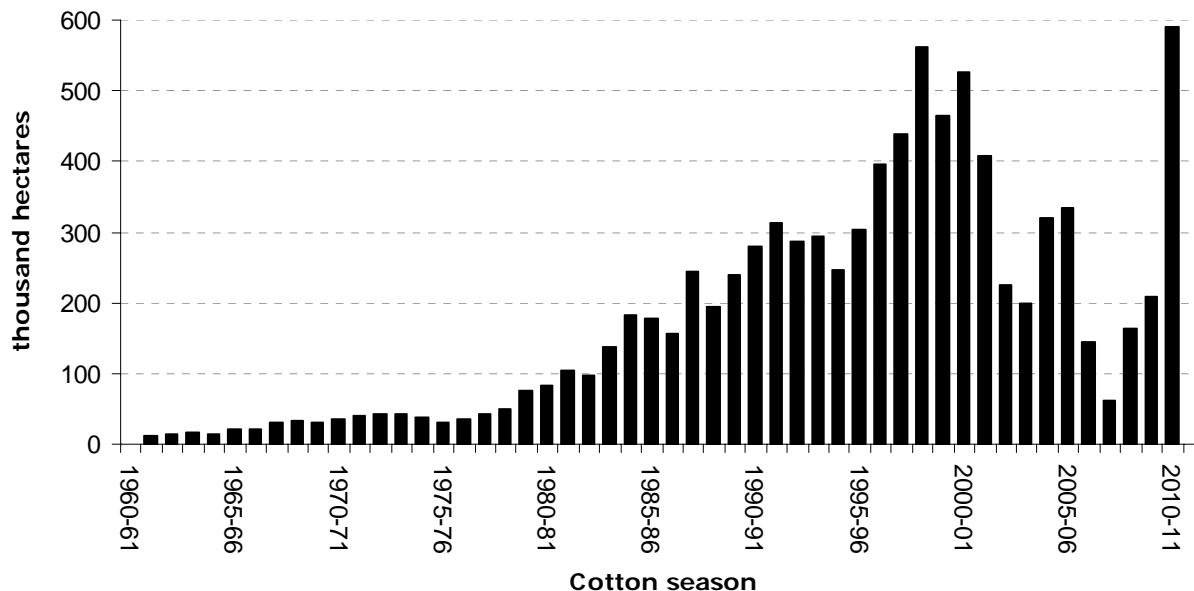
The following data is a time series of both the Australian and World cotton industries. The information is presented visually as a series of graphs and has been designed as an on-line interactive report which can be utilised by those making presentations on the cotton industry. The graphs can be downloaded as pictures or by clicking the hyperlinked reference the reader can be directed through to the actual data source.

Please note that the graphs in the section '*Australian Cotton Production & Values*' are based on data sourced from the Australian Bureau of Agricultural Research Economics (ABARE). The Australian data uses the Australian standard bale of 227kg (500lb). Graphs in the section '*World Cotton Production & Values*' are based on data sourced from the United States Department of Agriculture (USDA) and refer to 480lb (217.7kg) bales. These different values were used to ensure data was kept in context to local and international quoted figures, therefore using the common bale weight standards.

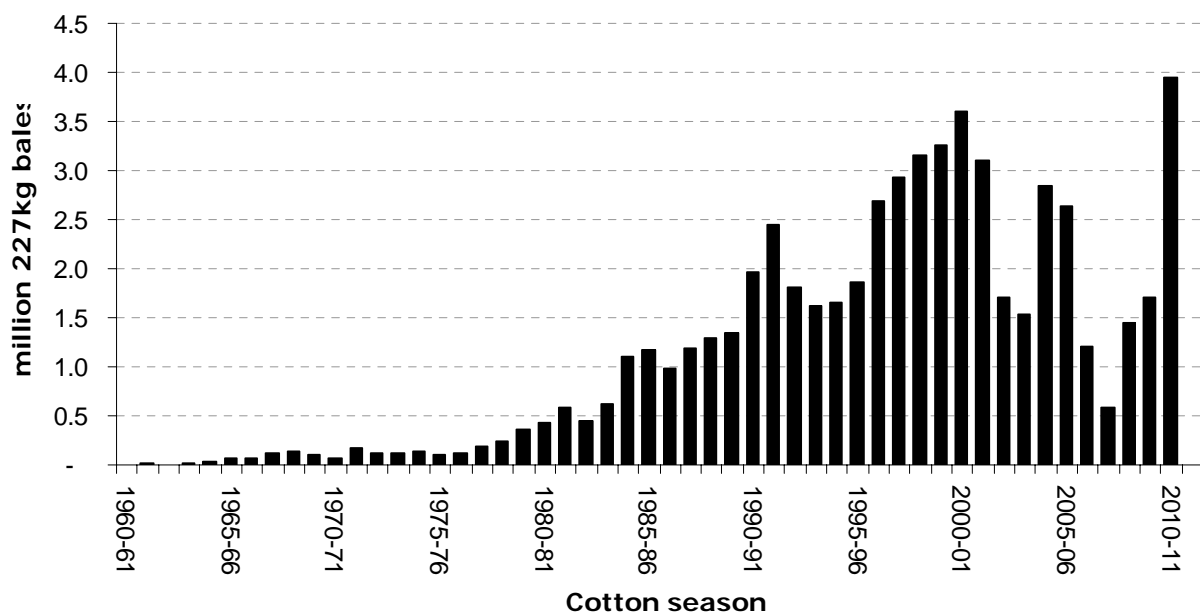
## TIME SERIES ~ AUSTRALIAN COTTON PRODUCTION & VALUES

### Australian Cotton Production 1961-2011

#### Cotton Area Harvested: Australia (ha)



#### Australian Lint production (bales)



Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 47&48, [Link to ABARE data](#)

- In the 2010-11 cotton season Australia had more area dedicated to cotton than ever before with 590 thousand hectares harvested. This surpassed the previous record in 1998-99 of 561 thousand hectares harvested. In 2007-08 just 41 thousand hectares were harvested due to severe droughts in Australia's cotton growing areas, this represented the smallest crop since the late 70's when the industry was in development. The resilience and capability of the industry is evident in its ability to bounce from the smallest crop in 30 years to the largest in just 3 years.
- Lint production closely follows hectares harvested, however due to increases in yield per ha, the peak of lint production was in 2010-11 when 898kt (3.95 million 227kg bales) was produced.

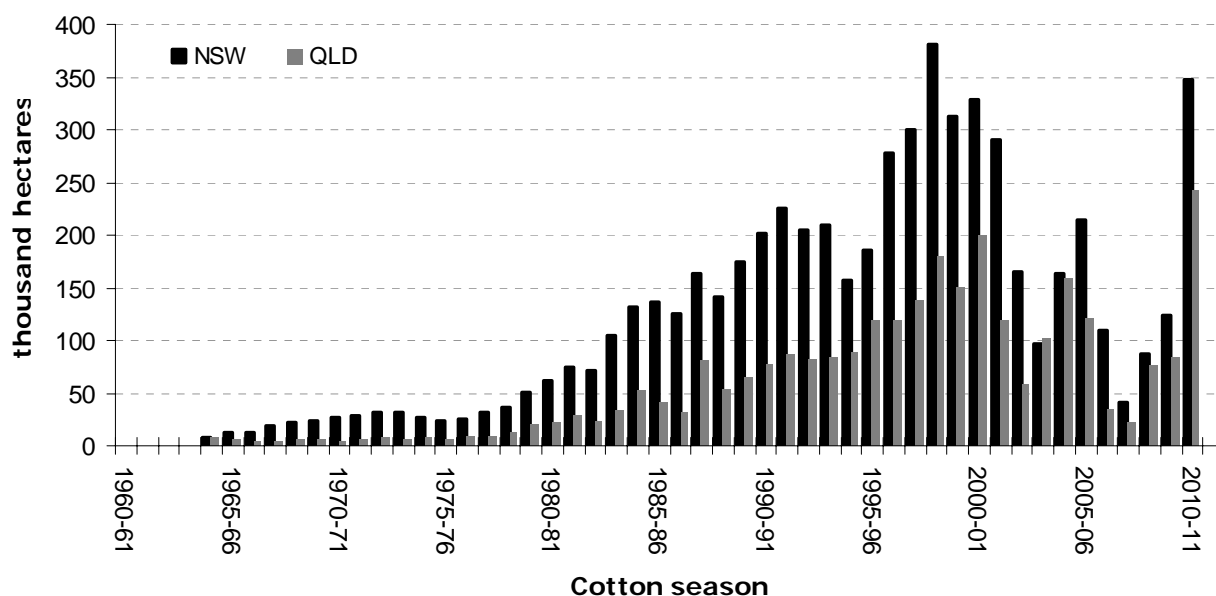
## Australian Cotton Regions



Image Source: Cotton Catchment Communities CRC, 2008

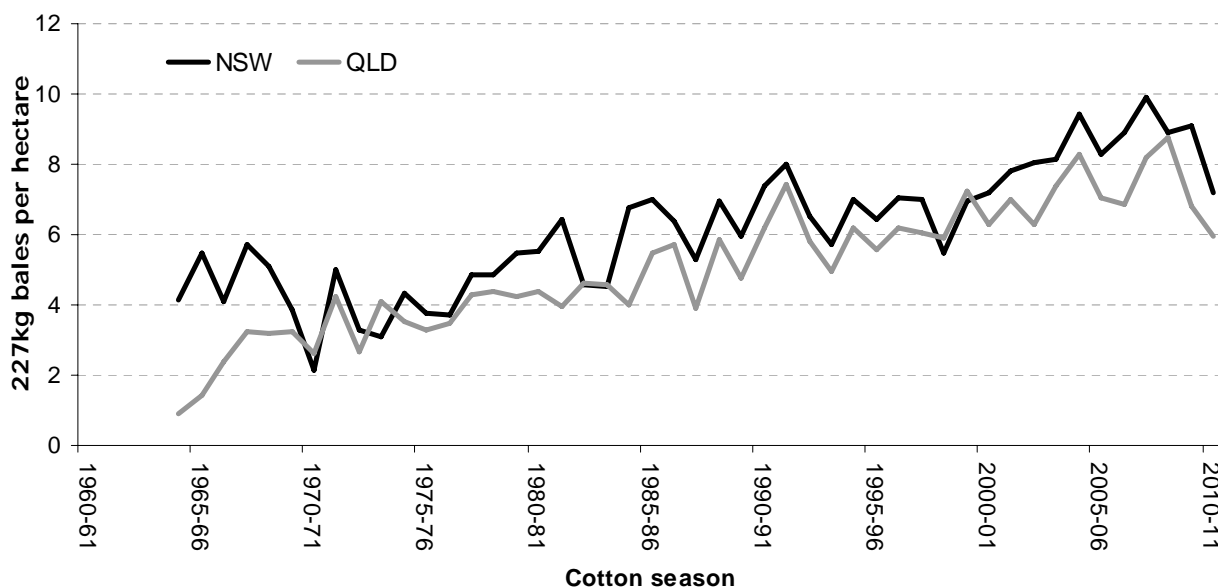
## Australian Cotton Production & Yield – By State 1964-2011

### Cotton Area Harvested: QLD & NSW



### Lint Yield: QLD & NSW (bales/ha)

Average including irrigated & dryland



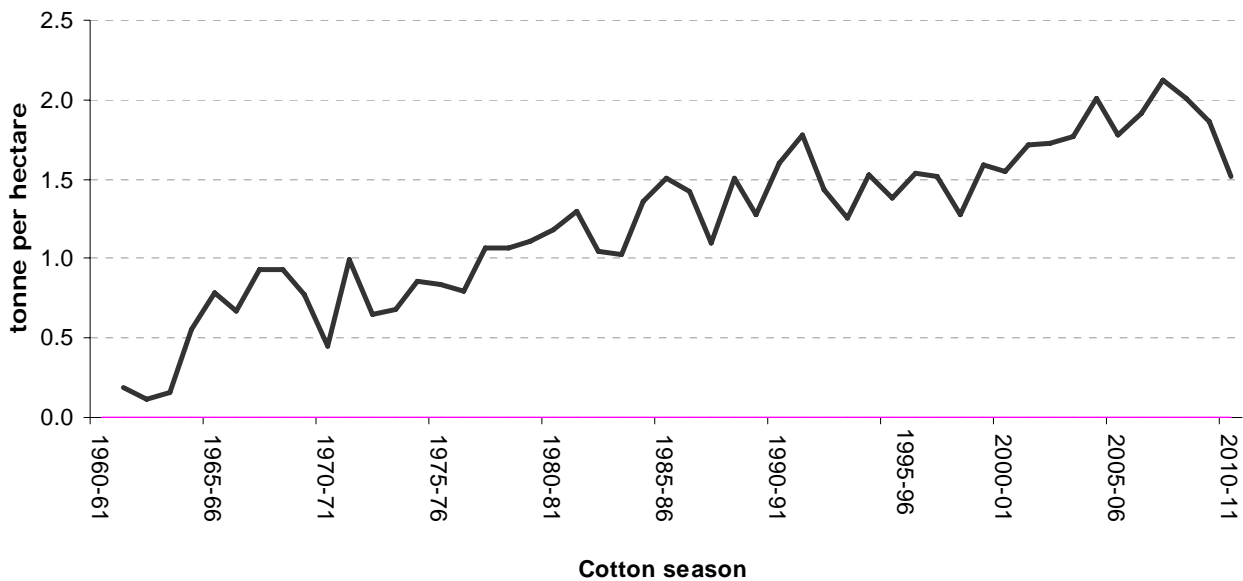
Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 47, [Link to ABARE data](#)

- In the past 10 years (2001-02 to 2010-11), 62% of Australia's cotton crop has been grown in NSW
- Average yield data includes dryland & irrigated yields. The more dryland cotton grown the lower the average yield. The Cotton Yearbook 2011 (Greenmount Press 2011) reported the average irrigated yield in Australia as 9.2 bales per hectare and the average dryland yield in Australia as 2.8 bales per hectare.

## Average Australian Cotton Lint Yields 1961-2011

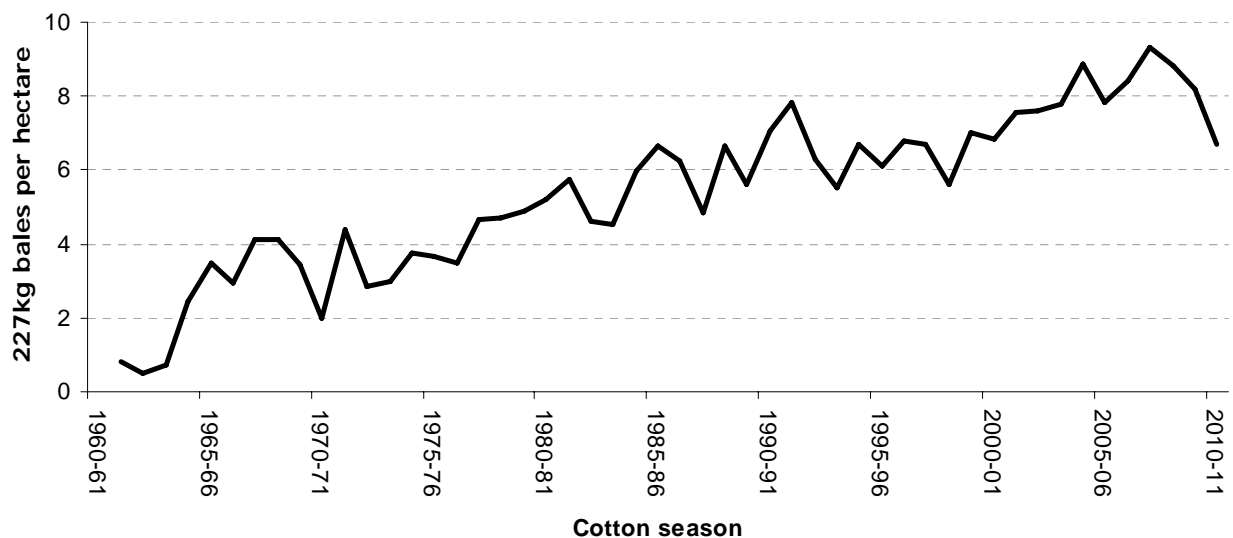
### Lint Yield: Australia (t/ha)

Average including irrigated & dryland



### Lint Yield: Australia (bales/ha)

Average including irrigated & dryland



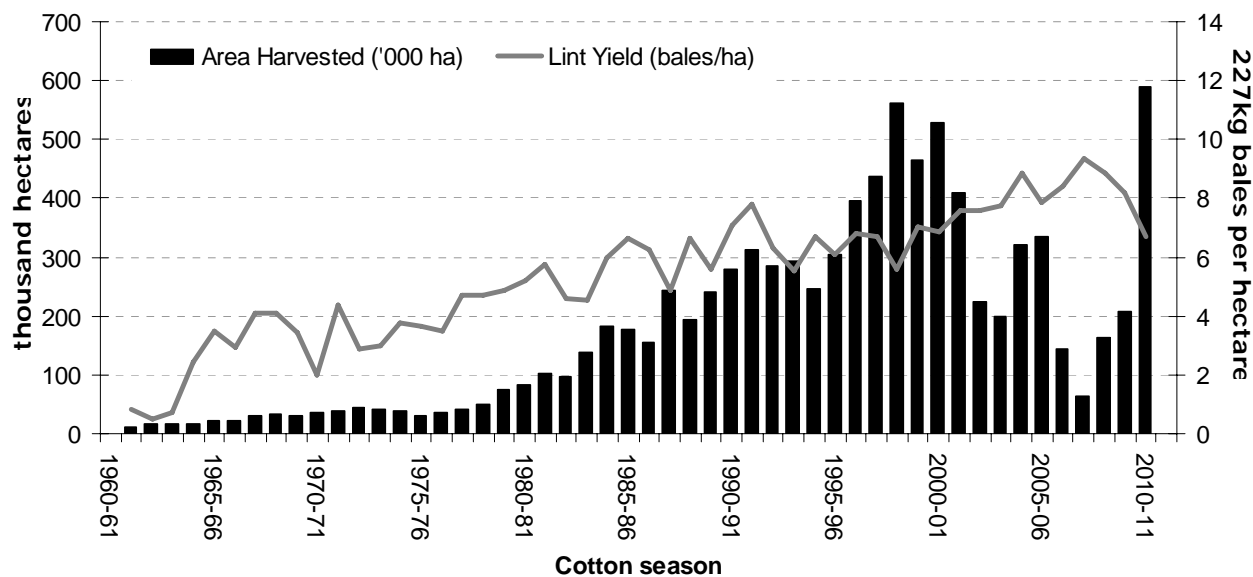
Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 47, [Link to ABARE data](#)

- In the 50 years of Australian cotton, yields have increased from 0.188 t/ha (0.83 bales/ha) in 1961-62 to a peak of 2.12 t/ha (9.34 bales/ha) in the 2007-08 season, 12 times the original yields
- Yields appear to have decreased over the three years, however a higher proportion of dryland cotton has been grown affecting the average.



## Australian Cotton Production (ha) & Lint Yields (227kg bale/ha: 1961-2011)

### Australian Area harvested and Lint yield ( Bales/ha)

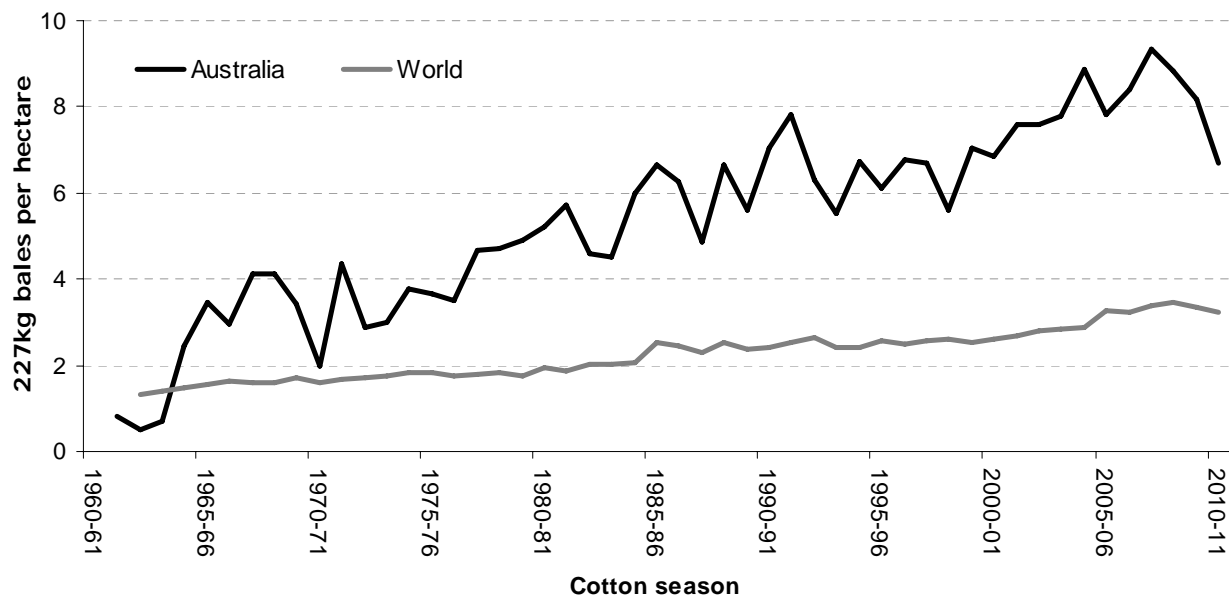


Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 47, [Link to ABARE data](#)

### Average Cotton Lint Yields Australia v World (227kg bale/ha): 1961-2011

#### Lint Yield: Australia & World (bales/ha)

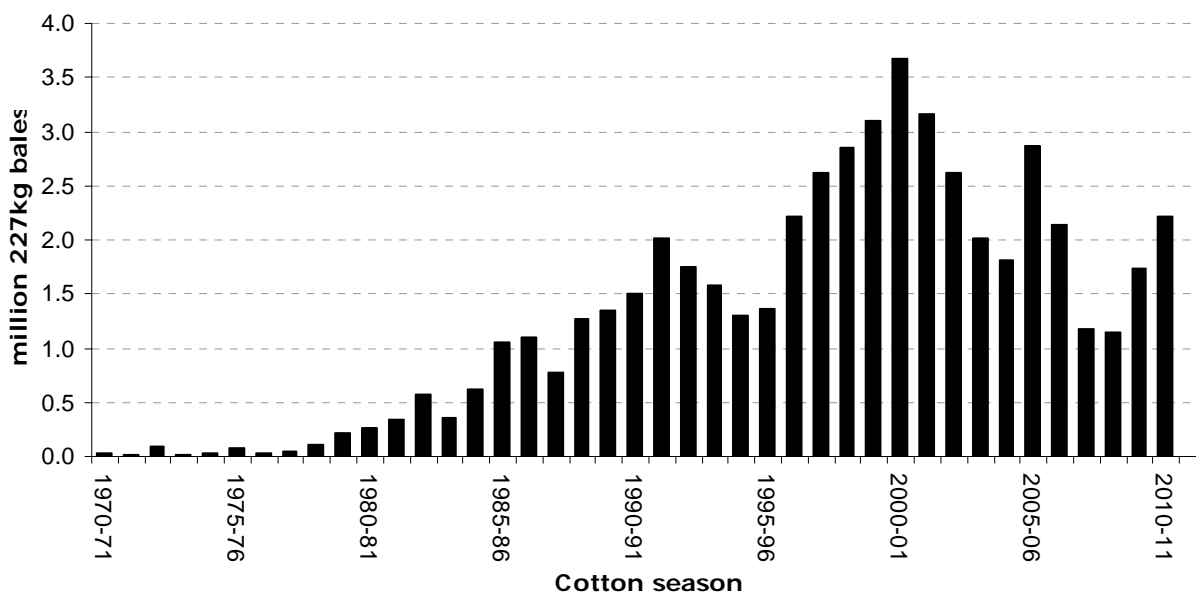
Average including irrigated & dryland



Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 47 & 53, [Link to ABARE data](#)

## Australian Cotton Lint Exports 1971-2011 (kt)

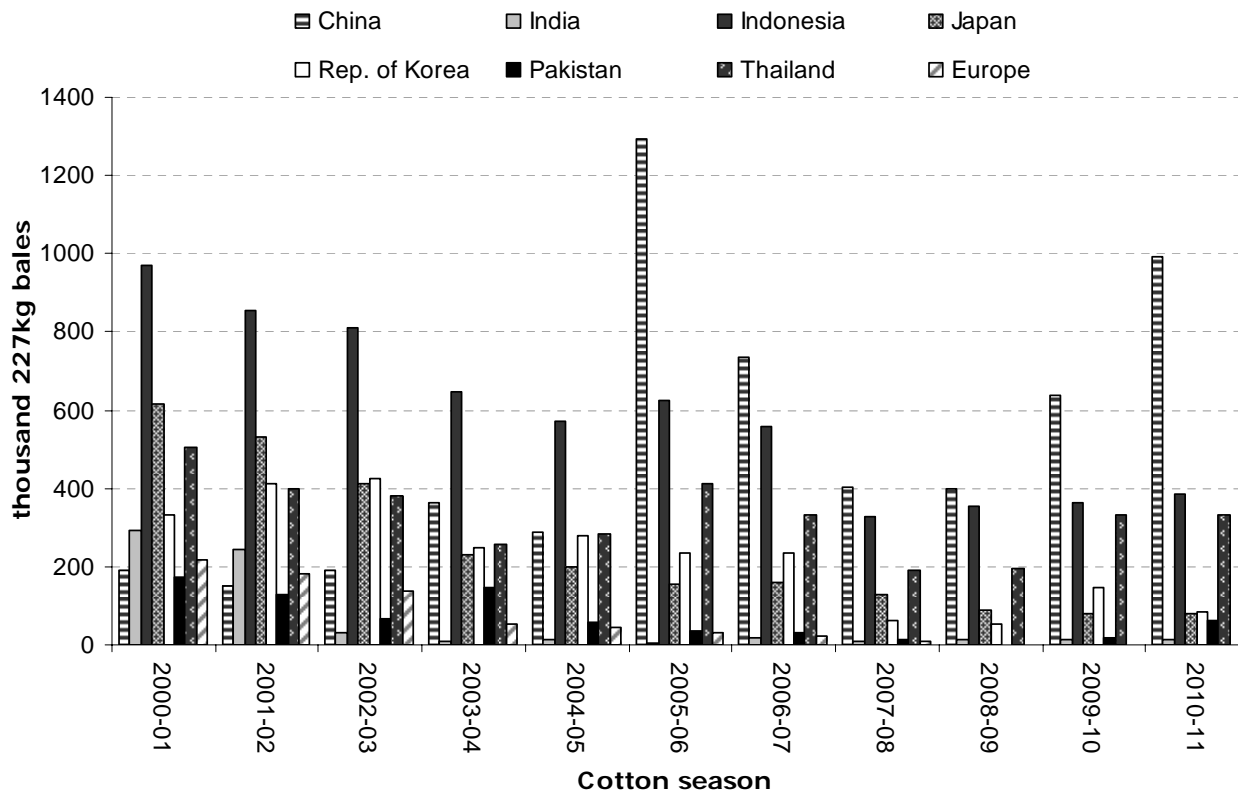
### Australian Lint Exports (bales)



Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 49, [Link to ABARE data](#)

## Destination of Australian Cotton Exports 2001-2011

### Exports: Destination of Australian Cotton

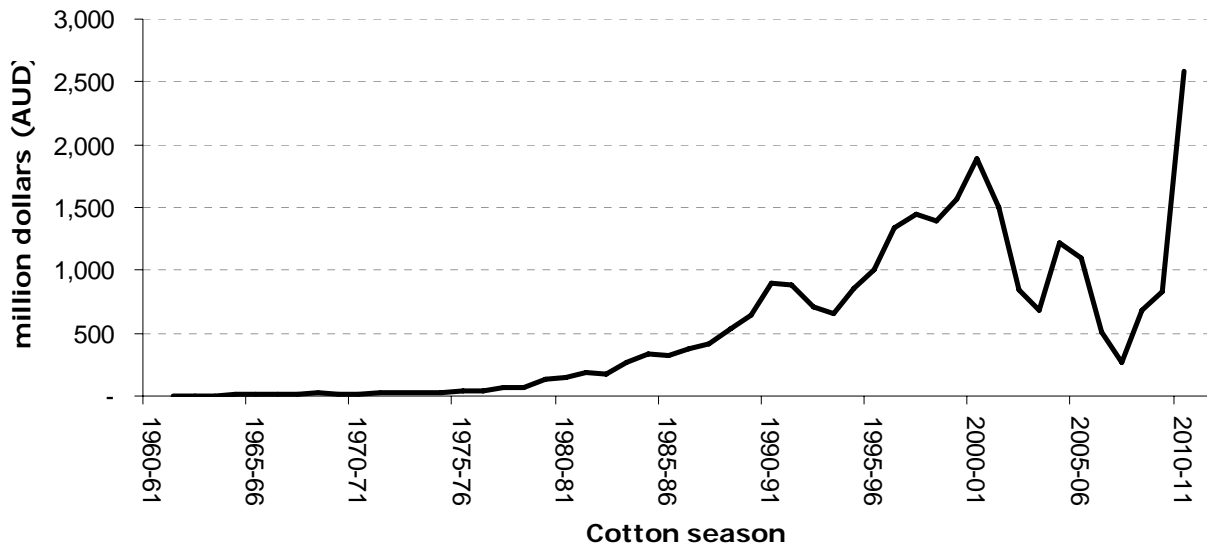


Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 50, [Link to ABARE data](#)

- The destination for Australian cotton exports has changed significantly recently with the reduction in exports to traditional trading partners in Europe, Japan, and India. Thailand and Indonesia remain strong trading partners and there has been a large increase in exports to China.

## Gross Value of Australian Cotton Production 1961-2011 (\$m)

### Gross value of production: Australian Lint (\$m)

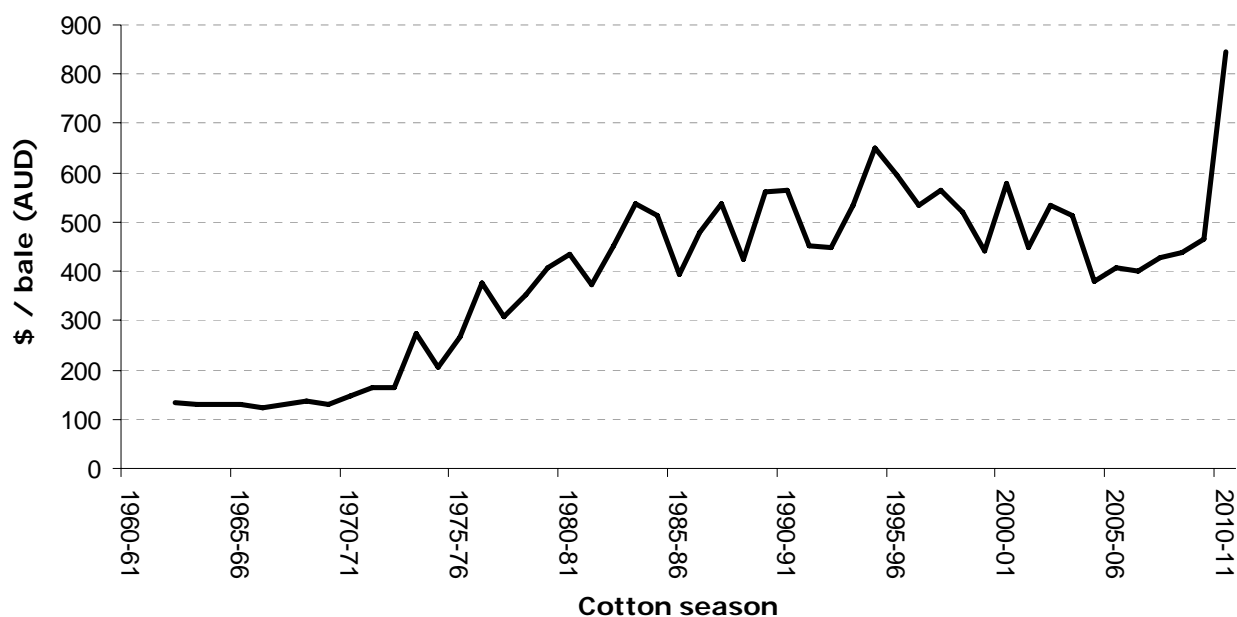


Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 49, [Link to ABARE data](#)

- In the 2010-2011 cotton season, the gross value of Australian cotton lint production peaked at AUD\$2.58 billion, with 898 kt of cotton lint produced. The value was compounded by peak production coinciding with peak cotton prices.

## Average Australian Raw Cotton Price 1961-2011 (¢/kg)

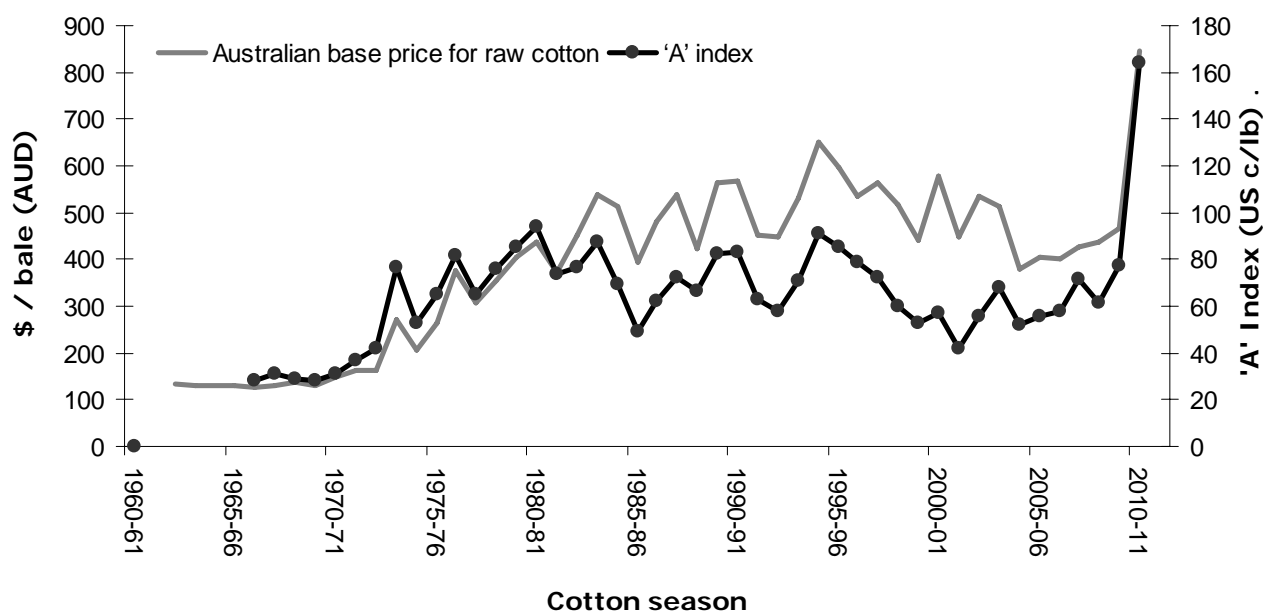
### Australian base price for raw cotton



Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 51, [Link to ABARE data](#)

## Average Australian Raw Cotton Price (\$AUD/ 227kg bale) v 'A' Index (US ¢/lb)

### Price v 'A' Index



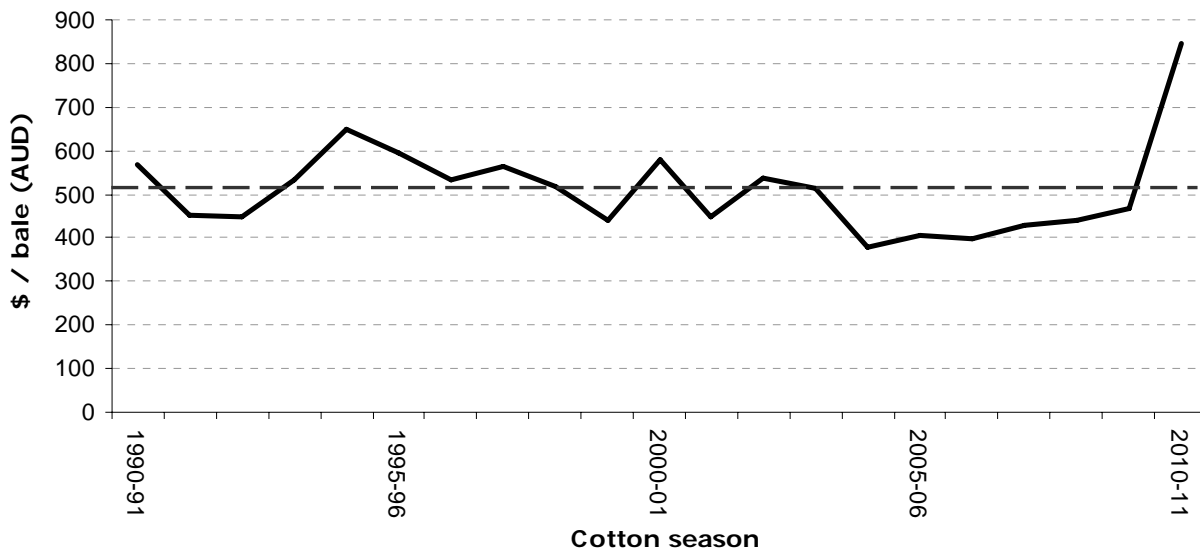
Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 51, [Link to ABARE data](#)

- The season average for Australian raw cotton was at a low in 1966-67 at 55 ¢/kg (AUD) and the highest season average was 2010-11 at 372 ¢/kg (AUD).

## Average Australian Cotton Prices

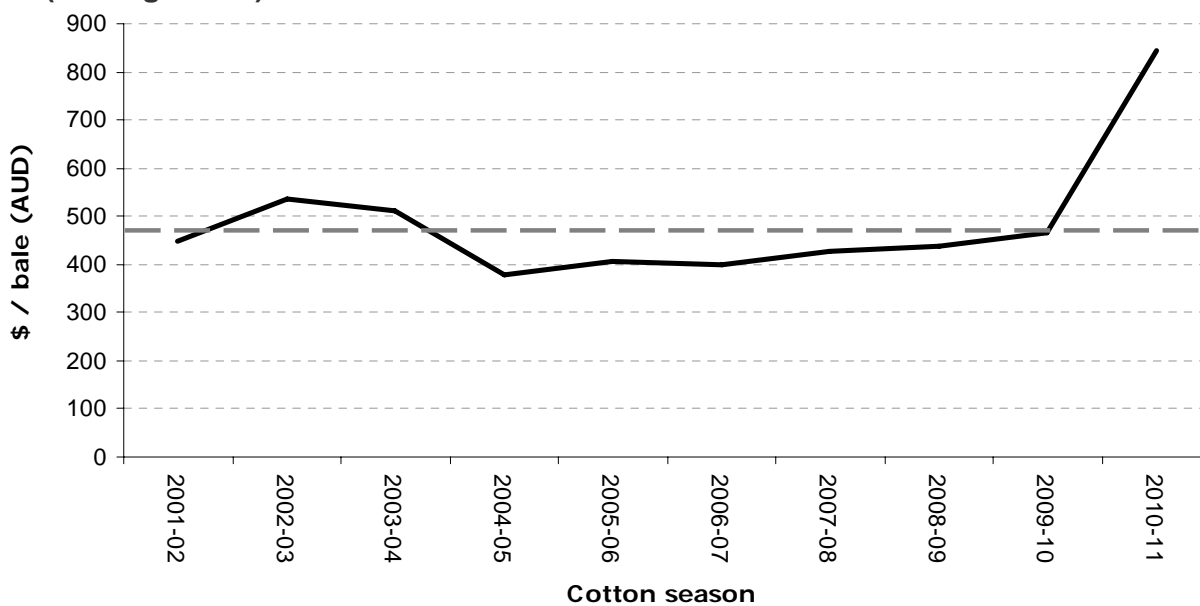
- 20 years

**Australian Cotton (\$/Bale): 20yrs (1992-2011)**  
(Average \$508)



- 10 years

**Australian Cotton (\$/Bale): 10yrs (2002-2011)**  
(Average \$485)



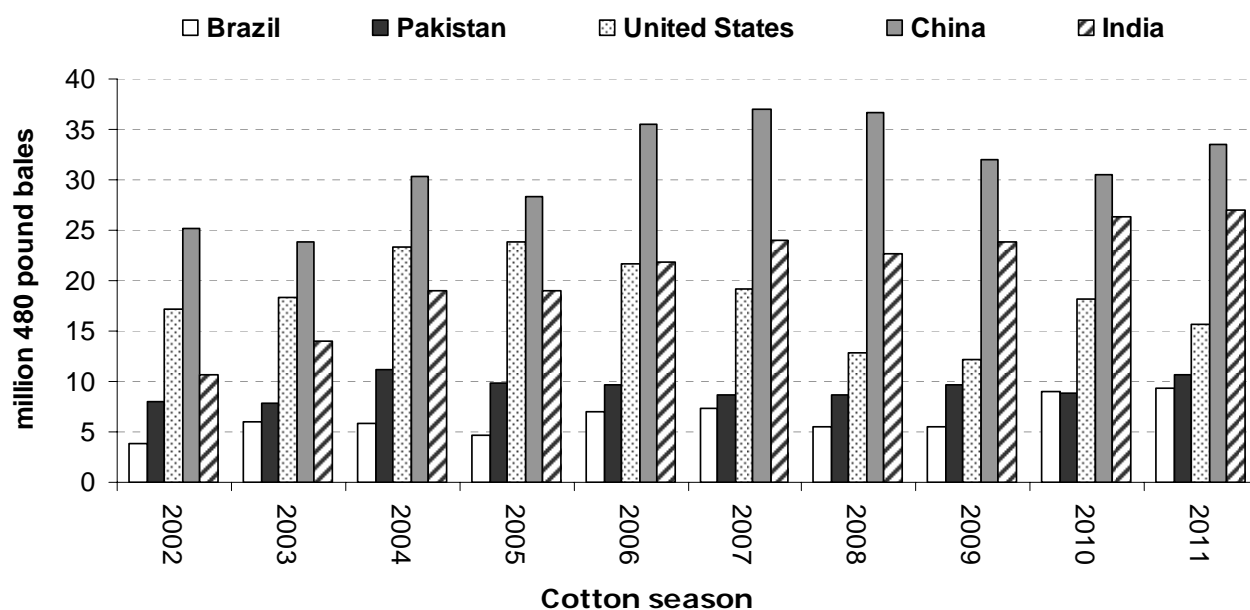
Data Source: ABARE 2011, Australian Commodity Statistics 2011, 'Cotton', Table 51, [Link to ABARE data](#)

## TIME SERIES ~ WORLD COTTON PRODUCTION & VALUES

Please note that whilst graphs in the previous section 'Australian Cotton Production & Values' are based on the Australian standard bale of 227kg (500lb), all graphs in this section 'World Cotton Production & Values' are based on data sourced from the United States Department of Agriculture (USDA) and refer to 480lb (217.7kg) bales. 2011/12 season figures are season estimates, 2012/13 figures are projected estimates.

### World Cotton Production ~ Top Five Producers ~ 2000-2009 (480lb bales)

#### Top 5 Producers of Cotton Lint (bales)

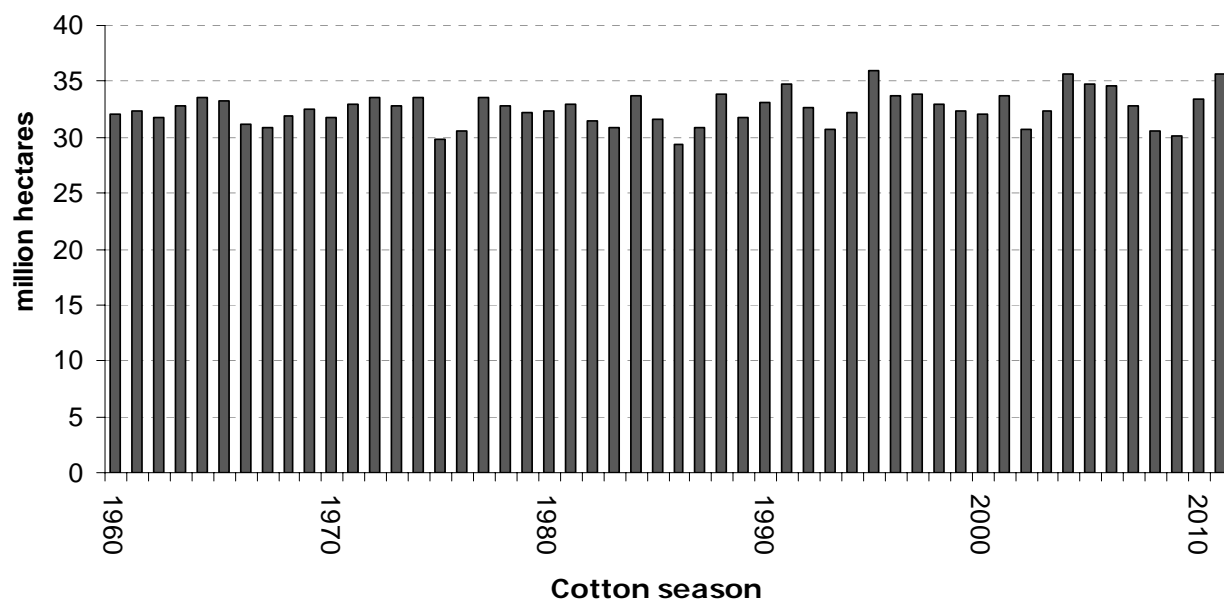


Data Source: (USDA 2012) *Cotton Supply & Distribution, Downloadable Data Set – Cotton*, <http://www.fas.usda.gov/psdonline/>

- In the past ten years, the top five producers have grown over 75% of the world's cotton.

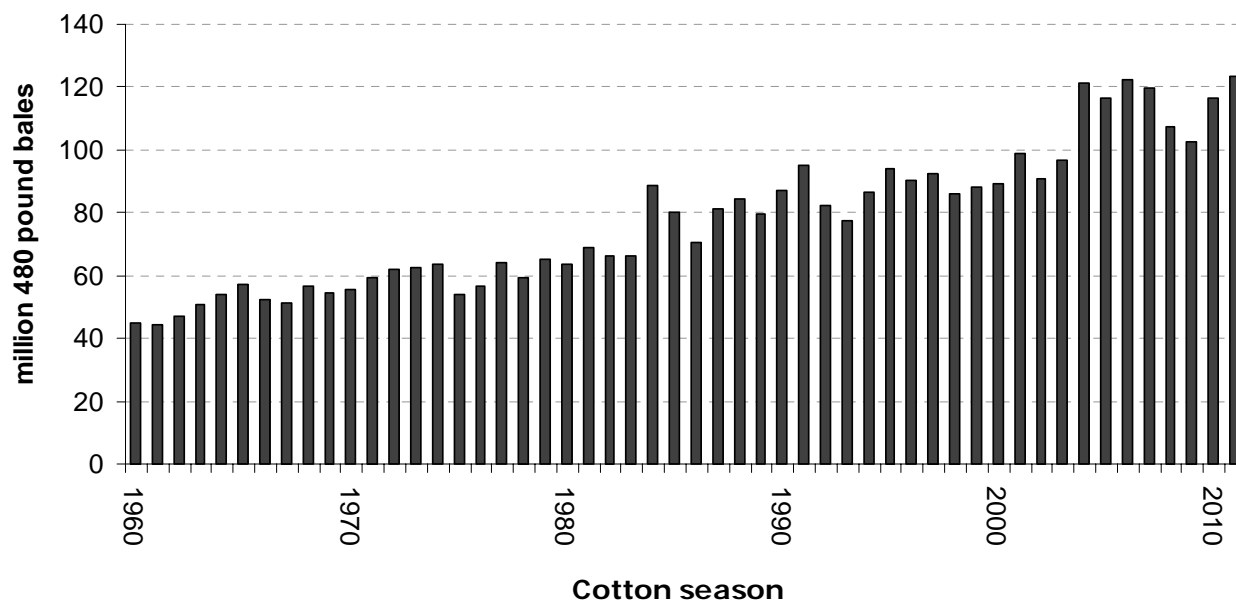
## World area grown to cotton 1960-2011 (ha)

### Cotton Area Harvested



## World Cotton Lint Production 1960-2011 (480lb bales)

### Cotton Lint Production (bales)

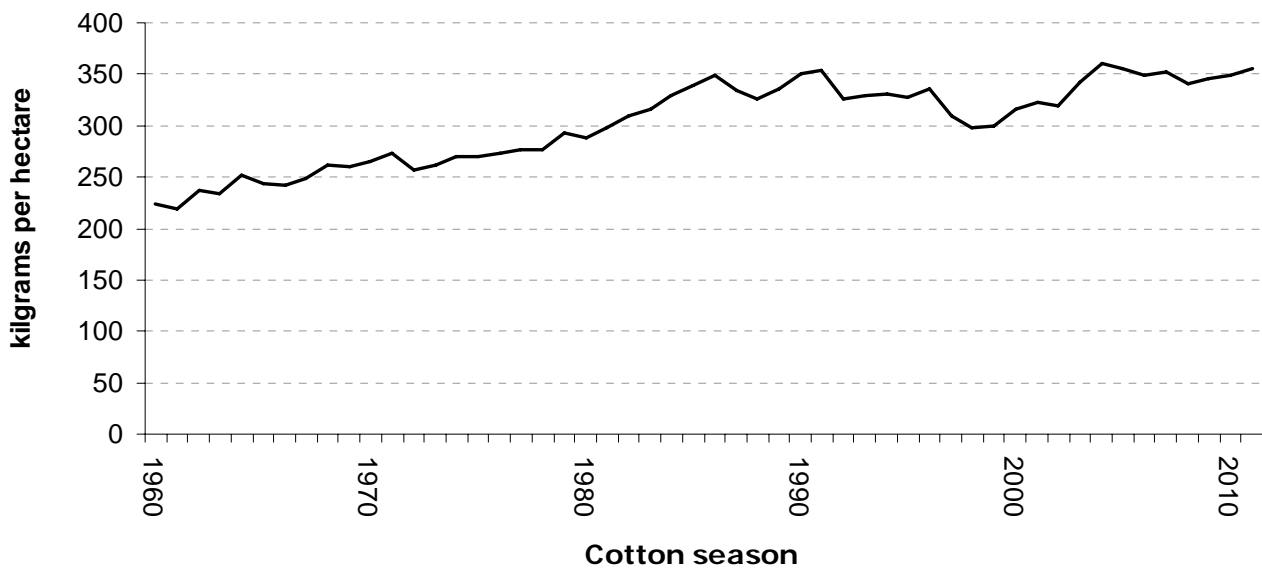


Data Source: (USDA 2012) *World Cotton Supply & Distribution*, Table 9, <http://www.fas.usda.gov/psdonline/>

- In the past 52 years, the world area of harvested cotton has ranged from an estimated 29 million ha in 1986-87 to an estimated 36 million ha in 1995-96.
- World cotton production has steadily increased from an estimated low of 59.5 million bales in 1978-79 to a estimated high of 124 million bales in 2011-12.

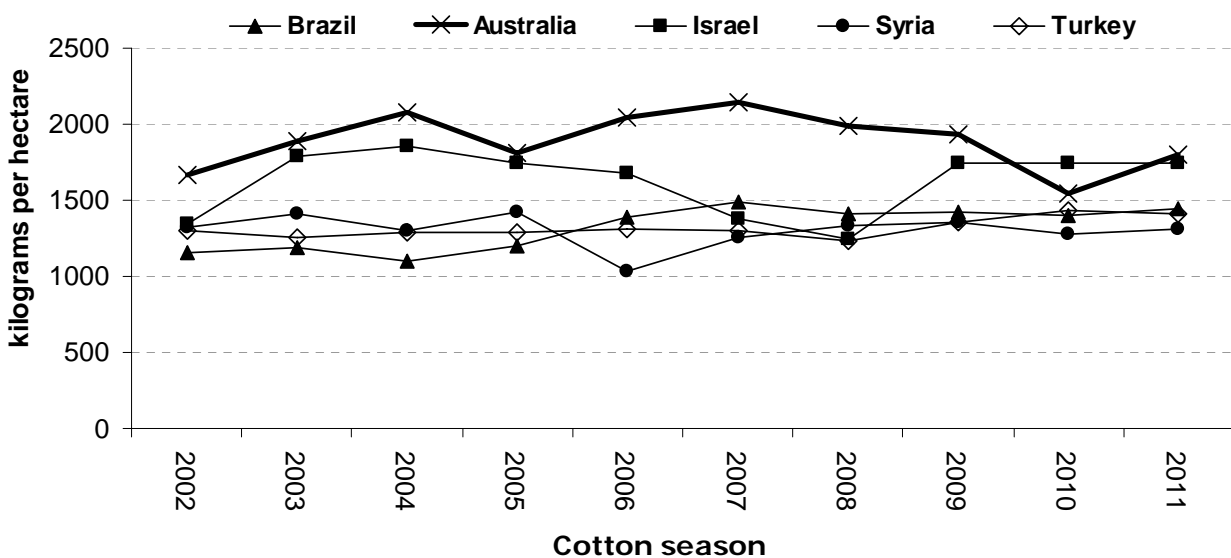
## Average World Cotton Yield ~ 1960-2011 (kg/ha)

### World Average Cotton Lint Yield



## World Cotton Yields ~ Top Five Yields ~ 2002-2011 (kg/ha)

### Countries with the Highest Lint Yields



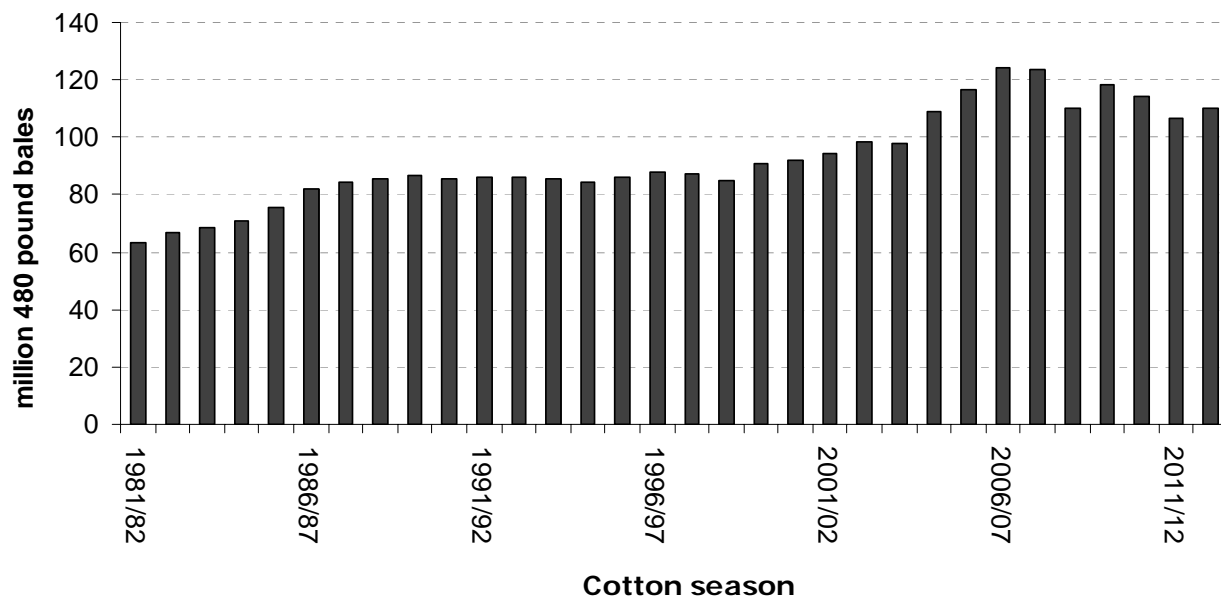
Data Source: (USDA 2012) *Downloadable Data Set – Cotton*, <http://www.fas.usda.gov/psdonline/>

- The increase in world cotton production has been largely due to improving yields. World average cotton yields have increased from an estimated 224 kg/ha in 1960 to a high of 361 kg/ha in 2004.



## World Cotton Consumption 1981-2012 (480lb bales)

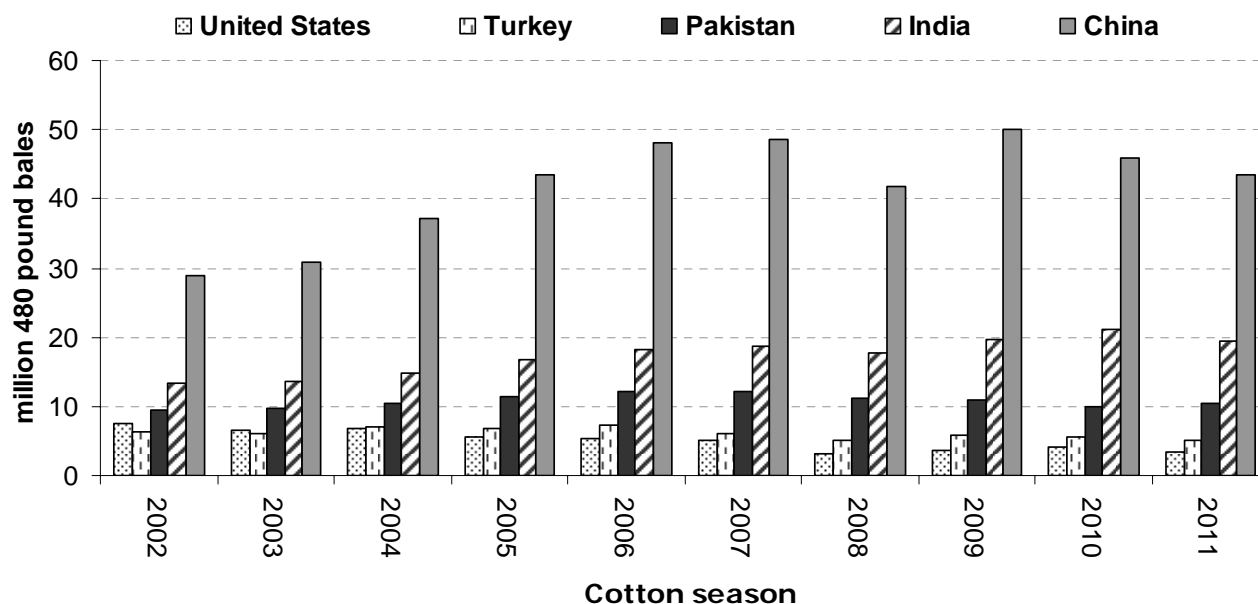
### World Cotton Lint Consumption



Source: (USDA 2012) *Cotton Supply & Distribution*, Table 9, <http://www.fas.usda.gov/psdonline/>

## World Cotton Consumption ~ Top Five Consumers ~ 2002-2011 (480lb bales)

### Top 5 Consumers of Cotton

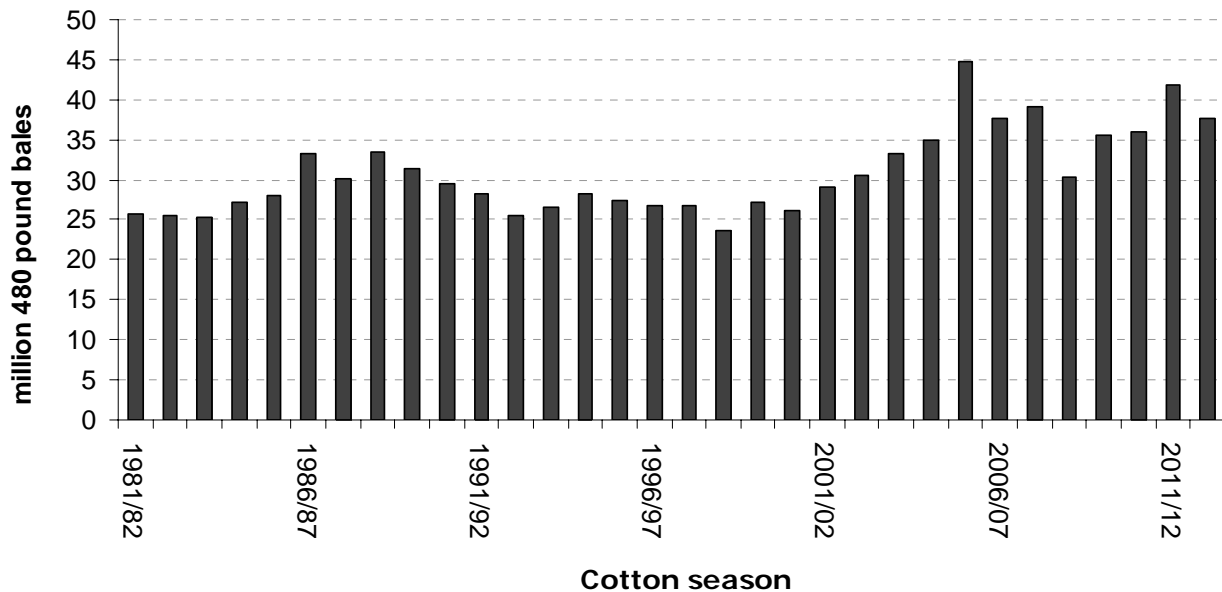


Data Source: (USDA 2012) *Cotton Supply & Distribution*, Downloadable Data Set – Cotton, <http://www.fas.usda.gov/psdonline/>

- World cotton consumption has been influenced largely by China over the past ten years. From the year 2000 through to 2009, China’s demand for cotton doubled from an estimated 23.5 million 480lb bales to an estimated 50 million 480lb bales.

## Exports 1981-2011 (480lb bales)

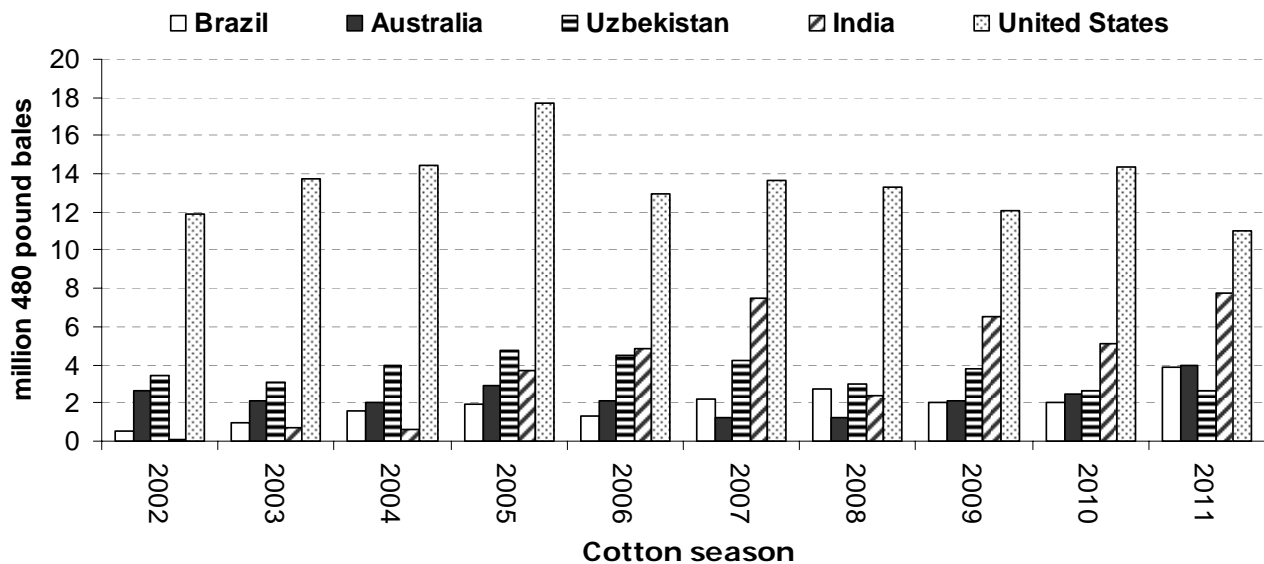
### World Cotton Lint Exports



Data Source: (USDA 2012) *World Cotton Supply & Distribution*, Table 9, <http://www.fas.usda.gov/psdonline/>

## Top Five Exporters ~ 2002-2011 (480lb bales)

### Top 5 Cotton Lint Exporters



Data Source: (USDA 2012) *Cotton Supply & Distribution*, Downloadable Data Set – Cotton, <http://www.fas.usda.gov/psdonline/>

- Brazil's presence in the world cotton export market has steadily increased over the past ten years from an estimated 489 thousand 480lb bales in 2002 to a peak of 3.9 million 480lb bales in 2011.
- In the past ten years, Australia's export of cotton lint has varied significantly due to drought, ranging from just over 1 million bales in 2008 to 4 million bales in 2011. During the same period, India has increased from less than 1% of world cotton exports to an estimated 6% in 2011.

## REFERENCE LIST

ABARE 2011, *Australian Commodity Statistics 2011*, Canberra

[http://adl.brs.gov.au/data/warehouse/agcstd9abcc002/agcstd9abcc0022011/ACS\\_2011\\_Cotton\\_Tables.xls](http://adl.brs.gov.au/data/warehouse/agcstd9abcc002/agcstd9abcc0022011/ACS_2011_Cotton_Tables.xls)

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