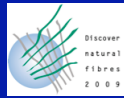


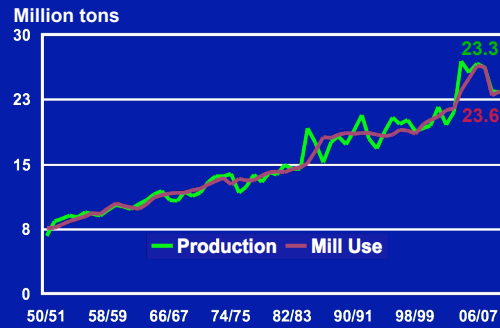
GLOBAL CONTEXT OF COTTON PRODUCTION



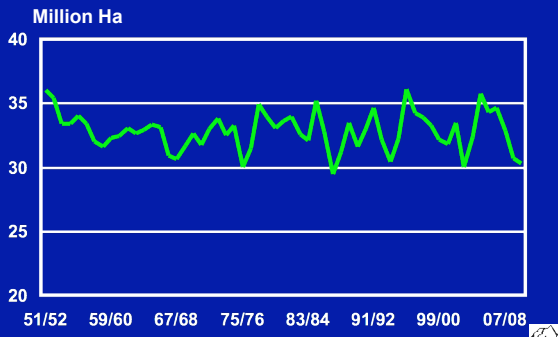
M. Rafiq Chaudhry
Technical Information Section

International Cotton Advisory Committee

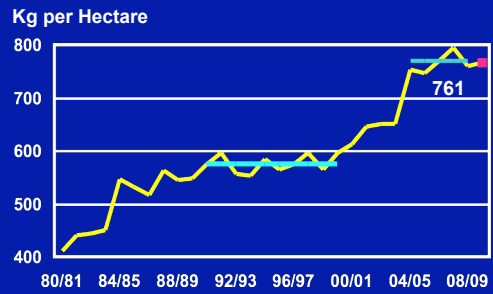
WORLD PRODUCTION AND MILL USE



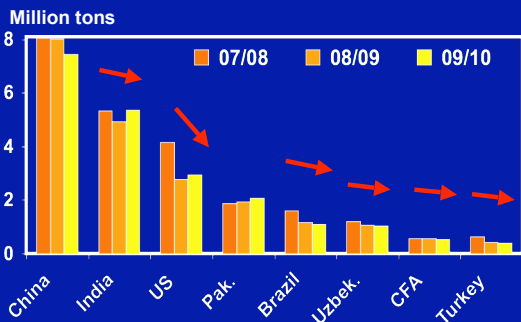
WORLD COTTON AREA



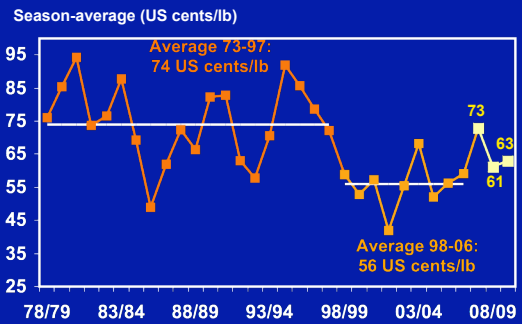
WORLD COTTON YIELDS



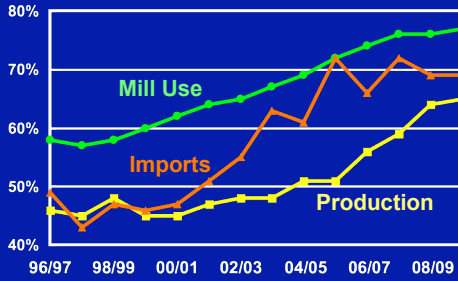
COTTON PRODUCTION



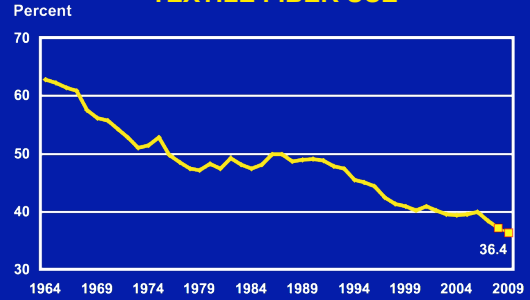
SEASON AVERAGE COTLOOK A INDEX



SHARE OF ASIA IN THE WORLD TOTAL



COTTON'S SHARE IN WORLD TEXTILE FIBER USE



PLANT PROTECTION CHEMICAL USE WORLD - 2008

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

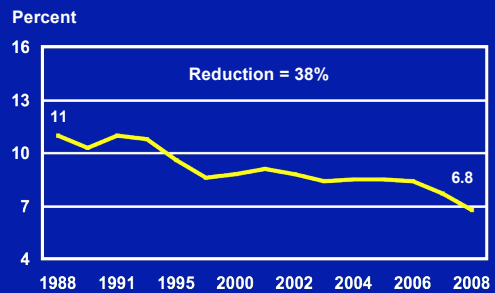
PLANT PROTECTION CHEMICAL USE COTTON - 2008

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

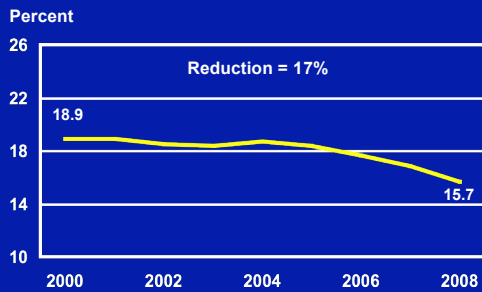
PLANT PROTECTION CHEMICAL USE COTTON - 2008

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

SHARE OF PESTICIDES - COTTON



SHARE OF INSECTICIDES - COTTON



LOWER CHEMICAL USE - FACTORS

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

LOWER CHEMICAL USE - FACTORS

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

CHEMICAL USE IN COTTON - FUTURE

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

CHEMICAL USE IN COTTON - TARGET

No insecticides

FIBER QUALITY - ISSUES

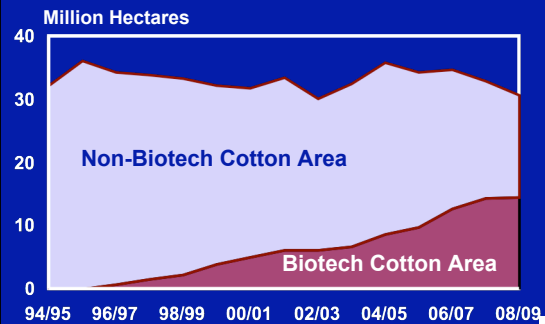
1. Contamination
(Plastic, polypropylene, etc)
2. Instrument testing
(High volume instrument)

FIBER QUALITY - Rapid Testing Instruments

Uster	= 2,200
Europe	= 10%
Asia	= 54%
Africa	= 12%
N. America	= 16%
S. America	= 8%

Premier = 400
(China, India, Pakistan, Brazil)

BIOTECH & NON-BIOTECH COTTON AREA



BIOTECH COTTON - 2008/09

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

BIOTECH COTTON - FUTURE

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

MAJOR CHANGES - FUTURE

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

ORGANIC COTTON

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

ORGANIC COTTON - SUGGESTIONS

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