

KATOEN COTTON

Volume 17 – No 2

- 
- Better Cotton Initiative adopted
 - Katoenstripper meer gewild
 - Aalwurm steeds kopseer
 - Katoenkultivaraanbevelings



Inhoud | Contents

3	Voorwoord/ Preface	13	Marges vir katoen en ander kompeterende gewasse
4	The Better Cotton Initiative to be adopted for SA cotton farmers	14	Die VSA se huidige katoen ondersteunings-programme
5	Die "katoenstripper" se gewildheid neem toe	15	Katoen Kultivaraanbevelings vir 2015/16
6	Enhancement of cotton production by smallholder farmers in the Makhathini region	16	Aalwurmpeste bly 'n kopseer vir katoenprodusente
7	Cotton most important fibre among natural fibres	18	At last: A great cotton success story
8	Cotton Market Report	19	Outlook on Textiles
10	SA Sustainable Textile & Clothing Cluster demand study		



Cotton SA Katoen

CEO: Hennie Bruwer

Tel: 012-804 1462

Fax: 012-804 8616

Website:

<http://www.cottonsa.org.za>

Katoen SA / Cotton SA,
Postbus / PO Box 912232,
Silverton, 0127

SUB-EDITOR

Johan Swiegers

Cell: 082 882 7023

E-mail: editor@pop.co.za

TECHNICAL ADVISOR

Hein Schröder 012-804 1462

MENTORSHIP PROGRAMME

Percy Macaskill 082 492 1493

SMALL SCALE COTTON

FARMERS' FORUM

Phenias Gumede 082 945 5476

EDITORIAL COMMITTEE

Hennie Bruwer, Koot Louw,

Hein Schröder, Robbie Kemp

ADVERTISING ADMINISTRATION

& SUBSCRIPTIONS

Suzanne Oosthuizen

Tel: 012-543 0880

Online subs: Email to

Suzanne@pop.co.za

Editorial content in

CottonSAKatoen is published

under the auspices of the

CEO of Cotton SA and

management. We reserve

copyright for all content in this

publication and advise readers

that opinions formed in the

editorials of **CottonSAKatoen**

are purely that of the authors.

Besoek ons webwerf /

Visit our website

cottonsa.org.za

Voorwoord

Ten spyte van katoenpryse wat in dollarterme oor die afgelope jaar redelik konstant gebly het teen laer vlakke wat meer as 5 jaar gelede laas gesien is, is daar hernieuwe belangstelling in droëlandkatoenverbouing. Die meer bekostigbare oesmetode wat verlede jaar deur middel van die Katoencluster aan droëlandboere bekend gestel is, het gelei tot 'n katoenoes vir die 2014/15-produksiejaar wat dubbel was as die van die vorige seisoen en vroeë aanduidings is dat hierdie groei in die toekoms gehandhaaf sal kan word. Die verwagting op hierdie tydstip is dat meer hektare vir die komende plantseisoen aangeplant sal word.

Eweneens kan 'n groei in katoenverbruik deur plaaslike spinners waargeneem word. Vir die eerste 4 maande van die huidige seisoen het plaaslike katoenverbruik met 6% toegeneem teenoor dieselfde tydperk die vorige jaar. Daar is weinig twyfel dat die Geïntegreerde Waardeketting Kleinhandelprogram wat deur die Katoencluster geïnisieer is, tot hierdie groei bygedra het en kan verwag word dat namate meer kleinhandelaars aan die program begin deelneem, sal die opname van katoen ook aansienlik toeneem.

'n Reeks vergaderings is ook onlangs oor die land deur die dti aangebied waar terugvoering gegee is met betrekking tot vordering wat gemaak is deur die tekstiel-, klere- en leerbedrywe oor die afgelope 10 jaar sowel as moontlike uitkomstes vir die toekoms. Gedurende hierdie sessies is 'n oorsig ook gegee oor die prestasies wat die Katoencluster in jaar een behaal het. Die reaksie vanaf bedryfsvertegenwoordigers was oor die algemeen baie positief met die verwagting dat die Volhoubare Katoencluster sal uitblink in jaar twee en daarna noudat die werklike implementering van die intervensies 'n aanvang geneem het!



Hennie Bruwer

Preface

Despite cotton prices in dollar terms having remained stable for the past year at lower levels last seen more than 5 years ago, a renewed interest in dryland cotton production can be observed. The more affordable harvesting method introduced for dryland farmers last year through the Cotton Cluster, has resulted in a RSA cotton crop for the 2014/15 production year which is about double that of the previous season and early indications are that this growth trend will continue in future with the expectation at this stage that more hectares will be planted to cotton for the coming planting season.

Similarly, a growth in cotton consumption by local spinning mills can also be seen. For the first 4 months of the current season, local cotton consumption increased by 6% compared to the same period a year ago. No doubt the Integrated Supply Chain Retail Program initiated by the Cotton Cluster contributed to this growth and it is expected that once more retailers join the program, the local uptake of cotton will also increase significantly.

Roadshows by the dti were recently held over the country where feedback was given in respect of progress made by the textiles, clothing and leather sectors over the past 10 years as well as possible outcomes for the future. During these sessions an overview of the achievements by the Sustainable Cotton Cluster during year one, was also presented. The response by the industry participants was very positive in general and the expectations are that the Sustainable Cotton Cluster will excel in year two and beyond now that the actual implementation of the interventions has commenced! 🌱

AMEN: "Unless the Lord builds the house, its builders labour in vain. Unless the Lord watches over the city, the watchmen stand guard in vain." Psalms 127: 1 | "As die Here die huis nie bou nie, tevergeefs werk die wat daaraan bou; as die Here die stad nie bewaak nie, tevergeefs waak die wagter." Psalm 127:1



The Better Cotton Initiative to be adopted for SA cotton farmers

The sustainability of cotton production involves addressing not only financial and environmental aspects but also social considerations. A balance between profitability, environmental impact and the people involved in cotton cultivation is vital to ensure a sustainable cotton value chain.

The Better Cotton Initiative (BCI) focuses on transforming cotton production worldwide as a mainstream commodity. To achieve this mission, BCI works with a diverse range of stakeholders across the cotton value chain to promote measurable and continuing improvements for the environment, farmers, farming communities and the economies of cotton-producing areas.

Four specific aims of BCI are

- Reduce the environmental impact of cotton production.
- Improve livelihoods and economic development in cotton producing areas.
- Improve commitment to and flow of Better Cotton throughout the supply chain.
- Ensure the credibility and sustainability of the Better Cotton Initiative.

Cotton South Africa decided to adopt the Better Cotton Initiative (the BCI Standard system) with some adaptation to fit the Southern African environment. The Sustainable Cotton Cluster was also structured to incorporate the implementation of a BCI or equivalent standard. The Sustainable Cotton Cluster will therefore be used to initiate the implementation of the

BCI processes whereafter Cotton South Africa will continue as the ultimate custodian and single point of contact in South Africa for the administration of BCI.

Cotton South Africa will adopt six Production Principles (as defined by BCI) that describe the broad areas under the control of the farmer that need to be addressed in order to produce Better Cotton:

- Production Principles and Criteria
- Capacity Building
- Assurance Program
- Chain of Custody
- Claims Framework
- Results and Impact

The six Production Principles are further defined by 24 criteria for smallholders and 20 additional criteria for medium and large farms, providing greater level of detail on the specific areas that needs to be addressed within each Production Principle. Each of the components will work together to support the system and the credibility of BCI. The system is designed to ensure the exchange of good practices, and to encourage the scaling up of collective action to establish Better Cotton as a sustainable mainstream commodity. 

Die “katoenstripper” se gewildheid neem toe

Hierdie “stripper” het ‘n onuitputlike bron van energie want nie net het hy die katoenprodusente in die Springbokvlakte suksesvol gedien nie, maar is nou ook in die Stella-omgewing, Noord-Wes Provinsie, besig om boere verder te ondersteun met sy doeltreffende plukaksie of soos die naam aandui, stripaksie.

Tydens die bekendstellingsdag van die katoenstripper by Stella was daar, soos te wagte, ongekende belangstelling en het +/- sewentig boere hierdie belangrike demonstrasiedag wat 18 Junie 2015 op Gert Cilliers se plaas, Memel, plaasgevind het, bygewoon.

Van die 1 500 hektaar katoen wat aangeplant was is ongeveer 600 hektaar alreeds teen Junie sonder enige noemenswaardige meganiese probleme geoes.

Die lewensvatbaarheid van hierdie oesmetode vir droëlandverbouing en die goeie graad- en kwaliteitsrealisasie wat tot datum ondervind was, gaan ‘n ongekende toename in die verbouing van droëland katoen tot gevolg hê.

Alhoewel daar in die vorige SA Katoentydskrif verwys is na deeglike voorbereidings wat gevolg moet word om katoen, veral met die “stripper”, te oes, is dit dalk wenslik om ook net te beklemtoon dat voortydig beplan moet word vir die daarstelling van bykomende strukture om die hantering en lewering van die meganiese oesproses te bespoedig.



Die mielieboere van Stella omgewing op Memel

Hoe langer katoen wat gereed is om geoes te word aan die verskillende klimaatomstandighede blootgestel word, hoe groter is die moontlikheid dat dit die voorkoms (kleur), d.w.s.

die graad van witheid, nadelig kan beïnvloed met gevolglike pryspenalisasie.

Indien volgehou kan word met die goeie graadrealisasie en -kwaliteite wat met hierdie oesmetode gelewer word, sal dit verseker tot ‘n verhoging in die aantal hektare wat onder droëland toestande verbou word, bydra!

Dit is tydens sulke produsente-dae waar die geleentheid geskep word om boere behoorlik in te lig oor die nuutste tegnologie om sukses in boerdery nog verder te verbeter. 🌱

“Hoe langer katoen wat gereed is om geoes te word aan die verskillende klimaatomstandighede blootgestel word, hoe groter is die moontlikheid dat dit die voorkoms (kleur), d.w.s. die graad van witheid, nadelig kan beïnvloed met gevolglike pryspenalisasie.”



Modulebouer in agtergrond en module gereed vir vervoer na die pluismeule

Enhancement of cotton production by smallholder farmers in the Makhathini region

By: L N Malinga ARC-IIC Private Bag X82075 Rustenburg 0300, South Africa. E-mail: lawrencem@arc.agric.za

In the past, over 3 000 smallholder farmers were successfully producing cotton in the Makhathini region. However with the liquidation of the Makhathini Gin this has decreased. The Gin was subsequently purchased by the Department of Agriculture, Forestry and Fisheries (DAFF) with the intention of re-commissioning it to process local cotton production.

DAFF has entrusted the day to day operations of the Gin to the Ubongwa Farmers' Co-Operative which comprises of almost 40 farmers' associations with a total number of over 1 500 farmers. This Co-operative will become responsible for the successful operation of the Gin. This will result in farmers being involved in more stages of the value chain of cotton processing. They are also responsible for the marketing of the cotton processed through the Gin and have already negotiated contracts with spinners.

Their intention is to take responsibility for their own cotton from production until it's processed into garments for the retail industry. In order for these farmers to successfully plant, maintain and harvest this crop they needed mentoring as well as fencing to prevent stray animals from grazing and damaging the cotton crop. The initiative to enhance cotton production by small holder farmers in the Makhathini region enabling them to become sustainable producers of quality cotton and get involved in additional phases of the value chain is funded by the Department of Rural Development and Land Reform (DRDLR) and implemented by the Agricultural Research Council (ARC) Institute for Industrial Crops.

The involved operations also helped create on-going jobs related to continuous cotton production to feed the entire value chain via the Makhathini Gin. During the project the ARC has supported Ubongwa Farmers' Co-operative to enable them to establish the Gin as a profitable enterprise



Vehicles that were purchased for the Makhathini Project

through mentoring of farmers in cotton production and the running of the Gin.

The objectives of the project included:

- On farm assessment of available infrastructure with beneficiaries
- Training of beneficiaries in cotton production through mentoring and on-farm and on-station demonstration trials
- Upgrading of infrastructure on farm to enable beneficiaries to successfully produce cotton
- Support to re-establishing the Makhathini Gin as a viable commercial enterprise.

A total of 710.6 ha were planted during 2013/14 season

and a total of 441 farmers have planted 1000 ha of which only 640 ha of cotton survived during the 2014/15 season. During the 2012/13 and 2013/14 seasons, a total of 1359 tons of seed cotton was ginned with a total of 513 and 577 beneficiaries,

respectively. Fencing of 150 ha was done at Ikhwehle, which is a field where some of the farmers from Ubongwa have cotton fields. A total of 51 farmers are the beneficiaries of the fenced land and 23 jobs were created during the erection of the fence at Ikhwehle.

Office furniture, computers and 4 vehicles were also purchased

"Farmers involved received support with planting, weed and pest control, and co-ordination of the delivery of cotton seed for planting."



Fencing material for Ikhwehle farmers' fields

Cotton most important fibre among natural fibres

Natural fibers are substances produced by plants and animals capable of being spun into yarn, thread, rope and filaments.

Of all the natural fibres, cotton is by far the most important fibre. Cotton is a natural fibre produced by a perennial tree that has been domesticated to grow as an annual plant. According to ICAC figures, 83.3 million tons of textile fibres were consumed in the world in 2013. In the same year, the production of natural fibres decreased for the second consecutive year and did not surpass 34.7 million tons. See Table 1.



TABLE 1: PRODUCTION OF NATURAL FIBRES

Fibre Type		Production in 000 Tons 2013	Production by Share in % 2013
Vegetable Fibers	Cotton	26,270.00	75.7
	Jute	3422.7	9.9
	Coir	1,205.6	3.5
	Flax and Tow	303.1	0.9
	Sisal	281.6	0.8
	Other Bastfibers	257.2	0.7
	Ramie	124.3	0.4
	Abaca (Manila Fiber)	103.5	0.3
	Kapok	101.3	0.3
	Hemp tow waste	56.4	0.2
Total:		32,125.6	92.6
Animal Fibers	Wool, greasy	2,126.9	6.1
	Silk, raw	167.9	0.5
	Total:	2,294.8	6.6
Mineral Fibers	Asbestos cloth, glass, fiber glass, minerals and other fibers not included	269.4	0.8
	Total:	269.4	0.8
Total:		34,689.7	100.0

Source: ICAC for cotton and FAO for other fibers

Cotton lint is the major natural fibre consumed around the world and accounts for 28% of world fibre consumption at the end-use level, and for 76% of all natural fibres produced worldwide. About 3.4 million tons of jute, kenaf and other similar fibres were produced in 2013, making this group the second largest block of natural fibres accounting for almost 10% of natural fibres in the world. Coir, with a global production of 1.2 million tons is the third largest natural fibre produced in the world and accounted for 3.5% of all natural fibres.

However, coir fibre rarely finds its way into textile products. Wool is the fourth largest natural fibre produced. It accounts for 3.5% of the total share, with a global production of 1.16 million tons (clean basis) in 2013. All other natural fibres, including flax, sisal, ramie, abaca, kapok, hemp, silk and the group of fibres of animal origin, such as camel hair or vicuna wool, amount to almost 5% of natural fibre production. 🌱

Koot Louw, Cotton SA

Source: SUMMARY OF AN ARTICLE BY M. RAFIQ CHAUDHRY AND LORENA RUIZ (ICAC) WHICH APPEARED IN THE JUNE 2015 EDITION OF THE ICAC RECORDER

<<< 6 MAKHATHINI

to assist with mentoring and training. Farmers involved received support with planting, weed and pest control, and co-ordination of the delivery of cotton seed for planting. The training provided was on field extension rather than formalised training. A total of 441 farmers were supported and trained during the 2014/15 season.

The project had 29 full-time employees at the Gin over the period of 20 months. During ginning of the 2012/2013 and 2013/2014 cotton, 42 seasonal workers were appointed for a duration of three months. Six vacancies were created for mentoring and training and a total of 577 cotton farmers were beneficiaries from the availability of the gin in the area. In terms of household food security, the same numbers of farmers will be able to sell to the gin the cotton that they

will produce.

An estimation of more than 1 500 farmers are potential beneficiaries in the area. There is also a potential of more than 2 500 ha of land that will produce cotton around Makhatini. During planting, weed control and harvesting periods, where temporary workers are employed, more jobs were created thus resulting in some revenue for some households around the area. A total funding of R 11.5 million was spent on the project in the past 2 years.

Negotiations are currently underway with DRDLR for continued funding for the next five years. During this period the Gin and farmers will become self-sufficient and no longer dependent on government support to successfully produce cotton. They will ultimately control their own destiny. 🌱



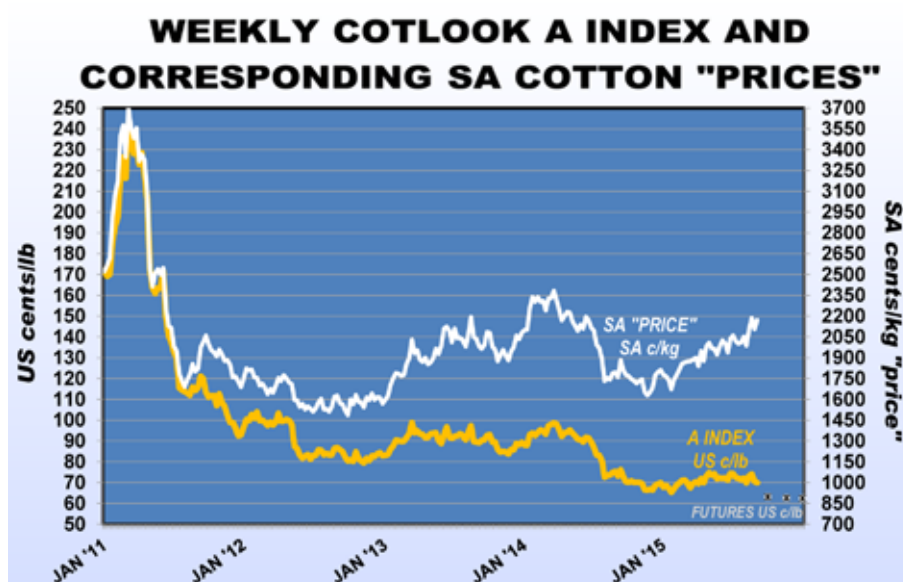
Cotton Market Report

as at 8 September 2015

With world cotton consumption projected to overtake world production in 2015/16, world cotton stocks are expected by the International Cotton Advisory Committee (ICAC) to contract for the first time in six seasons. The expected 2% growth in cotton consumption however, will not have a significant impact on world ending stocks which are expected to be reduced by 6%, or just over 1 million tons to 20.4 million tons.

International

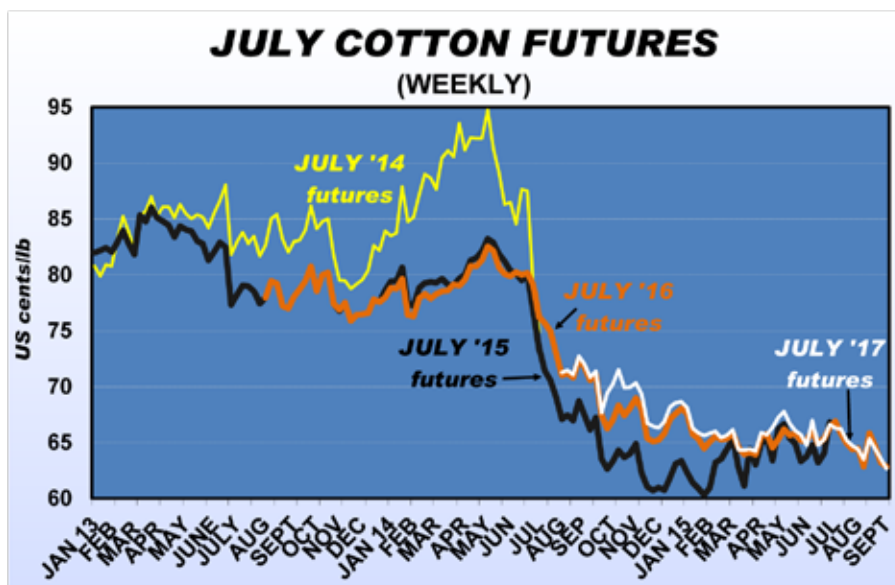
The limited growth in global cotton consumption can amongst others be ascribed to the fact that international cotton prices remain higher than that of competing manmade fibres. High domestic cotton prices and low polyester prices in China, the world's largest consumer of cotton, have made its cotton spinning sector less competitive. Although Chinese cotton and polyester prices were more or less equal during most of the 2000's, with cotton sometimes the cheaper of the two, the prices diverged in 2009/10 with cotton prices remaining substantially above those of polyester since then.



It can be expected that the high global cotton stock levels will continue to place downward pressure on international prices and that the lower prices in turn will curb world cotton production. World cotton area is expected to decrease by about 7% in 2015/16. The ICAC also expects that cotton production in India, China, the USA and Pakistan, accounting for about 70% of global cotton production, will decline by about 11% in 2015/16.

World cotton trade are projected by the ICAC to remain more or less stable in 2015/16 at about 7.6 million tons. China's cotton imports however are expected to decrease by 12% to 1.6 million tons in 2015/16, marking the 5th season of decline after peaking at 5.3 million tons in 2011/12. The USA will remain the world's largest cotton exporter even though cotton exports are projected by the ICAC to decrease by 9% in 2015/16, largely due to reduced production.

>>> 11



Average Cotlook A index prices and corresponding South African "cotton prices":

	A INDEX	DERIVED RSA
	<u>Avg: US c/lb</u>	<u>Avg: SA c/kg</u>
Last week (31/08 - 04/09/15)	70.05	2106.73
August 2015	71.76	2070.34
Today (07/09/15)	69.90	2171.11
July 2015	72.35	2013.52
Today a year ago	73.20	1760.15
Today two years ago	88.35	2005.28

The Cotlook A index is a daily indicator of international lint prices and is the average of the cheapest 5 quotations (cost & freight) from a selection of the principal upland cottons traded internationally, destination Far East.

COTTON CROP REPORT - 8th ESTIMATE

2014/15 PRODUCTION YEAR

31/08/15

PRODUCTION REGION	HECTARES IRRIGATION	HECTARES DRYLAND	YIELD IRRIGATION kg seed cotton/ha	YIELD DRYLAND kg seed cotton/ha	PRODUCTION 200 kg bales cotton lint	% OF CROP HAND PICKED	% OF CROP GINNED SO FAR
LIMPOPO PROV.							
Loskop	1488	0	4550	0	11848	1%	81%
North & South Flats	120	530	3500	1000	1663	0%	81%
Dwaalboom/Thabazimbi	0	0	0	0	0	0%	0%
Weipe	800	0	4000	0	5920	0%	55%
NORTHERN CAPE							
Vaalharts	1255	0	5428	0	12602	0%	81%
Lower Orange River	1130	0	5343	0	11170	0%	50%
Rest of Northern Cape	2702	0	5541	0	27696	0%	58%
NORTH WEST							
Stella/Setlagoli	1117	4176	4936	1439	19707	0%	50%
Taung	0	0	0	0	0	0%	0%
KWAZULU-NATAL	80	640	800	421	601	100%	60%
MPUMALANGA	100	1290	4500	500	2025	100%	72%
EASTERN CAPE	0	0	0	0	0	0%	0%
RSA TOTAL	8792	6636	5032	1123	93232	3%	62%
Swaziland*	0	3500	0	600	3600	100%	0%
Botswana*	0	0	0	0	0		
Namibia*	0	0	0	0	0		
Zimbabwe*	0	0	0	0	0		
Mozambique*	0	0	0	0	0		
GRAND TOTAL	8792	10136	5032	943	96832	7%	60%

* Particulars relate to expected purchases of seed cotton by RSA & Swaziland ginneries from these countries.

SA Sustainable Textile and Clothing Cluster demand study

This study, commissioned by the SA Sustainable Textile and Clothing Cluster (now known as the Sustainable Cotton Cluster) was undertaken by The Moss Group during 2014/15. Their final report was recently released and some of their key findings are summarised in this article.

Background and Context

The South African textile and clothing sector was once a thriving industry capable of satisfying local demand, while employing a significant number of people across the textile value chain. The situation changed dramatically after 1994 following South Africa’s re-entry into the global market. During the period 1998 to 2014, local production decreased by 37% across the broader Clothing, Textile, Footwear and Leather (CTFL) sectors, while the last six years show a substantial contraction of 28% resulting in massive job losses across the clothing and textile sectors.

The Textiles and Clothing industry has been targeted by the Department of Trade and Industry (dti), as part of their Industrial Policy Action Plan (IPAP), as one of four industries to receive dedicated support. This is primarily due to the substantial job creation potential that it presents throughout the value chain. The development and implementation of a clear industry-wide, demand-led strategy is crucial to the turnaround and future growth of the industry.

Objective of the study and methodology

The principal aim of this textile demand study for apparel and home ware was to establish the size of the local demand and highlight specific areas of high demand. The outputs of the study will be used to inform a demand-led strategy

aimed at turning the South African textile and apparel industry around.

The broader demand study commenced with high-level desktop research. This was followed by a comprehensive analysis using both a bottom-up and top-down research approach.

Summary of key findings

The study demonstrated that the local demand for apparel and home ware textiles is substantial. Figure 1 offers a schematic of the estimated textile demand requirement (per annum) across the value chain, for selected divisions included in the study, based on their high fabric volume items (across Government, Industry and Consumer Basics).

The first output for CMT manufacture shows a consolidated average annual demand for 1285 million inventory items (apparel and soft linen). This demand translates to 1827 million metres of composite fabric or 543 million kg of composite fibre for fabric manufacturing.

It is interesting to note that cotton fibre makes up almost 60% of the consolidated demand scenario in terms of the fabric composition of apparel and home ware textiles

>>> 11

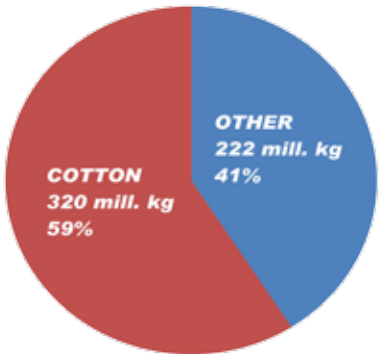


Figure 2

The Consumer Basics market is approximately 60 times larger than the other market segments combined

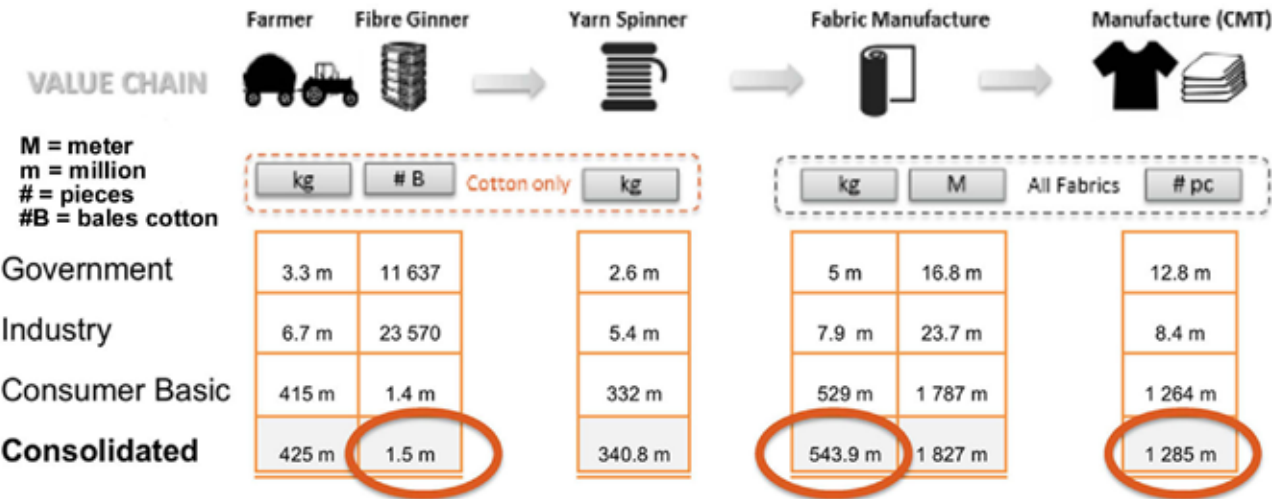


Figure 1

(Figure 2). In order to produce this amount of cotton for the composite fabric, 340 million kg of cotton yarn is required from spinning, which translates to 1.5 million bales of cotton.

The study also highlighted various opportunities and insights that could inform an industry-wide strategy in respect of market, inventory and fibre opportunities.

For example, the top five inventory items by cotton demand (tons) across sectors are shown in Table 1. It can be seen that jeans and T-shirts emerged as the items requiring the greatest amount of cotton.

The Study points to the need for a strategy that targets a combination of markets and the recommended way forward is to explore the attractiveness of those areas identified as opportunities in the study. The opportunities could include, for example, local production relative to imports, the key drivers of competitiveness of successful local players, the

ITEM	GOVERNMENT	INDUSTRY	CONSUMER BASICS	TOTAL Tons cotton lint
Jeans			50 147	50 147
T-shirts	247	3	43 303	43 553
Shorts			30 663	30 663
Towelling			27 445	27 445
Sheets	502	107	25 885	26 494

Table 1

potential of job creation and the development of capability requirements.

Conclusion

Demand-led thinking was absent in previous initiatives to revitalise the local industry and could be the key lever towards achieving an effective and sustainable turnaround for the industry. Therefore the purpose of this study was to inform the development of a demand-led strategy for the industry. ☺

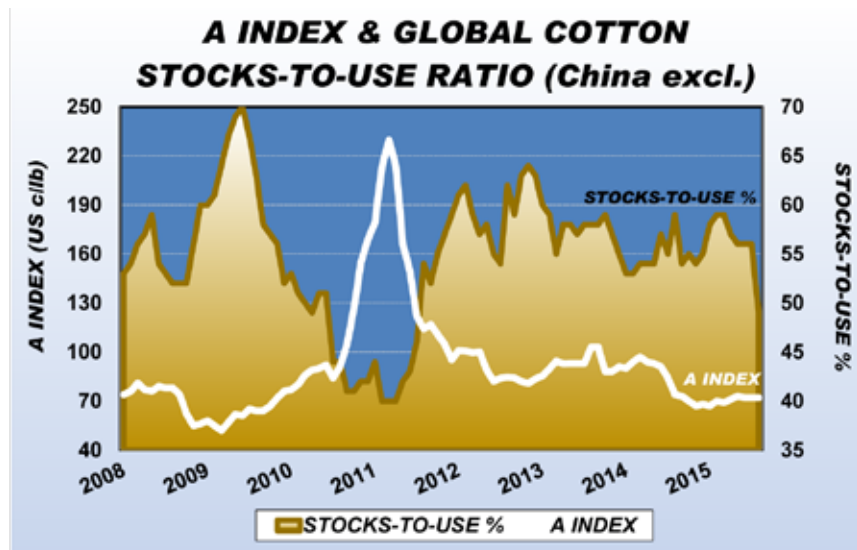
Source: EXTRACT FROM THE DEMAND STUDY UNDERTAKEN BY THE MOSS GROUP

New York cotton futures as at 4 Sept. 2015 (settlement prices):

NY FUTURES	
	US c/lb
Oct 2015	63.07
Dec	62.62
Mar 2016	62.40
May	62.66
July	62.82
Oct	61.13
Dec	61.84

Local outlook

As far as the local outlook is concerned, the 8th estimate for the 2014/15 production year indicates a total crop of 96 832 lint bales, up 101% from the previous season but 4% less than last month's crop estimate due to lower dryland yields. About 93 232 lint bales are estimated to be produced from RSA grown seed cotton, up 113% from the previous season.



The balance of 3 600 lint bales relates to expected Swaziland produced cotton to be ginned by the Swaziland gin. ☺

Estimated world supply and demand for cotton for the 2013/14 season and projections for 2014/15 and 2015/16 (seasons beginning 1 August):

(million metric tons)	2013/14	2014/15	2015/16
Beginning stocks	18.0	20.3	21.8
Production	26.3	26.2	23.7
Consumption	23.6	24.5	25.0
Exports	9.0	7.9	7.6
Imports	8.6	7.6	7.6
Ending stocks	20.3	21.8	20.4
Ending stocks/use (China excluded)	51%	54%	49%
A Index (US c/lb)	91	71	62-93

Katoen uit die boonste rakke!



Met Deltapine® kwaliteit katoenvariëteite van Monsanto, kan jy nou die opbrengs en die veselkwaliteit van jou katoen verbeter.

Deltapine bied jou hoëkwaliteit variëteite, naamlik:

- **DP 210 BRF:**
 - BGII x RR-Flex stapelgeen
 - Medium seisoenlengte
 - Uitstekende opbrengspotensiaal
 - Uitstekende veselkwaliteit
 - Slegs besproeiing
- **Delta 12 BRF:**
 - BGII x RR-Flex stapelgeen
 - Medium-lang seisoenlengte
 - Uitstekende opbrengspotensiaal
 - Uitstekende veselkwaliteit
 - Besproeiing sowel as droëland
- **Delta 18 RF:**
 - RR-Flex vir toevlugsarea
 - Medium-lang seisoenlengte
 - Goeie opbrengspotensiaal
 - Uitstekende veselkwaliteit
 - Besproeiing sowel as droëland
- **PM 3225 B2RF:**
 - BGII x RR-Flex stapelgeen
 - Lang seisoenlengte
 - Uitstekende opbrengspotensiaal
 - Goeie veselkwaliteit
 - Droëland en opkomende boere



Trek voordeel uit jou oes met Monsanto.



Meer oor Monsanto Maatskappy

Monsanto-maatskappy is 'n toonaangewende, globale verskaffer van tegnologiegebaseerde oplossings en landbouprodukte wat die produktiwiteit op die plaas en die kwaliteit van voedsel verbeter. Monsanto is daarop gefokus om boere by te staan om meer uit hul grond te kry terwyl hulle die wêreld se natuurlike hulpbronne, soos water en energie, toenemend bewaar.

Kontak gerus ons kliëntediens by: 011 790-8200 of customer-care.sa@monsanto.com

Om meer te wete te kom oor ons besigheid en ons verbintenisse, gaan na: www.monsanto.com. Volg ons bedrywighede op Twitter® by [www.twitter.com/MonsantoCo](https://twitter.com/MonsantoCo), op Facebook® by www.facebook.com/MonsantoCo, of teken in op ons NewsRelease RSS Feed.

Monsanto is 'n geregistreerde handelsmerk van Monsanto Technology LLC. Monsanto Suid-Afrika (Edms) Bpk, Posbus 69933, Bryanston, 2021.

Marges vir katoen en ander kompeterende gewasse

Volgens berekeninge deur GWK gedoen, kan 'n besproeiingsboer 'n 75% beter bruto marge realiseer deur katoen in plaas van mielies te plant, gebaseer op opbrengsaannames van 5.5 t/ha vir katoen en 13.5 t/ha vir vroeë mielies.

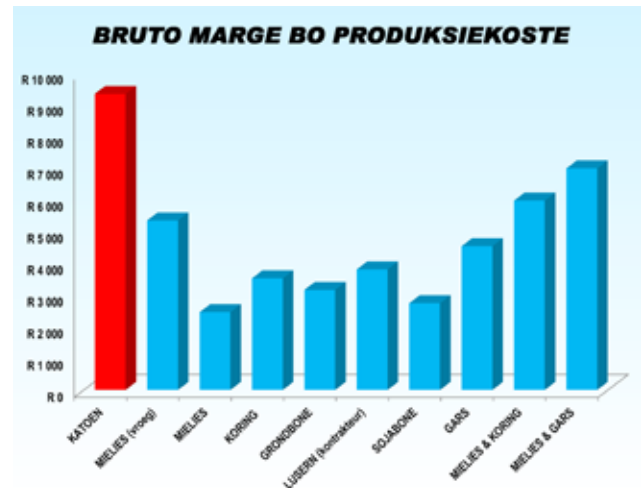
MARGES

Die tabel hieronder toon die jongste produksiekoste en marge vergelykings vir 'n aantal gewasse soos onlangs deur GWK bereken. In die tabel kan ook waargeneem word dat katoen se marge bo koste uitgedruk per mm besproeiingswater gebruik, uiters doeltreffend is in vergelyking met die van ander gewasse. Producente kan gerus hiervan kennis neem veral teen die agtergrond van beskikbare waterkwotas vir gewasverbouing.

In die grafiese voorstelling kan ook duidelik gesien word dat nie een van die gewasse in die berekenings gebruik, by katoen kan kers vashou wat winsgewendheid betref nie.

WISSELBOU

Behalwe vir katoen se groter inkomsteproeksie, is dit ook 'n ideale wisselbou gewas. Wisselbou is een van die belangrikste boerderypraktyke wat produsente kan volg want nie alleen verbreek dit die lewensiklusse van baie insekplae en patogene nie, dit voeg ook meer organiese materiaal toe tot die grond wat nie die geval is wanneer 'n mono-verbouingstelsel gevolg word nie. Wisselbou verbeter ook die grondstruktuur deur die afwisseling van diep wortelstelsel plante met vlak



wortelstelsel plante. Die groot voordeel van katoen as wisselbougewas is dat sy diep wortelstelsel nie vatbaar is vir die tipe Fusarium wat aangetrek word deur die wortelstelsels van mielies en koring nie.

DROOGTEVERDRAAGSAAMHEID

Nog 'n belangrike oorweging vir boere wat hul gewasportefeulje wil uitbrei, is die droogteverdraagsaamheid van katoen. Die katoenplant het 'n diep en uitgebreide wortelstelsel, wat die grond tot 'n diepte van 1 800 mm kan binnedring en die plant in staat stel om nie alleen voedingstowwe nie maar ook water in die droogste toestande te vind.

Boere wat tradisioneel mielies en ander gewasse as katoen plant behoort hulle opsies vir die komende plantseisoen noukeurig te oorweeg want gebaseer op huidige mark- en insetkoste-inligting, behoort katoen die eerste keuse te wees. 🌱

Koot Louw, Katoen SA



KATOEN EN KOMPETERENDE GEWASSE: PRODUKSIEKOSTE EN BRUTO MARGE VERGELYKING										
	KATOEN	MIELIES (vroeg)	MIELIES	KORING	GROND-BONE	LUSERN (kontrakt.)	SOJA-BONE	GARS	MIELIES & KORING	MIELIES & GARS
Produsenteprys	R 7 460/t	R 2 250/t	R 1 950/t	R 3 640/t	R 8 940/t	R 2 017/t	R 4 890/t	R 3 412/t		
Opbrengs	5.5 t/ha	13.5 t/ha	13.5 t/ha	6.5 t/ha	3 t/ha	16 t/ha	4 t/ha	6.5 t/ha		
Bruto Produksiewaarde (per ha)	R 41 045	R 30 375	R 26 325	R 23 660	R 28 620	R 32 267	R 19 560	R 22 180	R 49 985	R 48 505
Totale Produksiekoste (per ha)	R 31 712	R 25 031	R 23 875	R 20 142	R 25 465	R 28 467	R 16 827	R 17 646	R 44 017	R 41 521
Bruto Marge bo Koste (per ha)	R 9 333	R 5 344	R 2 450	R 3 518	R 3 155	R 3 800	R 2 733	R 4 534	R 5 968	R 6 984
Marge per mm water gebruik	R 12.44	R 8.22	R 3.77	R 6.40	R 4.85	R 2.98	R 3.96	R 7.95	R 4.97	R 5.72
Gelykbreekprys/ha	R 5 770/t	R 1 854/t	R 1 768/t	R 3 098/t	R 8 488/t	R 1 779/t	R 4 207/t	R 2 715/t		



Die VSA se huidige katoen ondersteuningsprogramme

Die VSA wat vir 14% van wêreldkatoenproduksie en 31% van wêreldkatoenuitvoere verantwoordelik is, het 'n lang geskiedenis van regeringsbeleid wat daarop gemik is om VSA katoenboere se inkomste te ondersteun by wyse van 'n reeks programme, insluitend direkte betalings.

President Obama het verlede jaar 'n nuwe 5-jaar VSA Plaaswetsontwerp onderteken wat betekenisvol verskil van vorige wetgewing in die verband. Ingevolge die nuwe wetgewing sal daar nie langer gewaarborgde direkte betalings wees nie maar sal boere net in aanmerking kom vir betalings wat gebaseer is op dalende pryse, misoeste of 'n vermindering van inkomste. Dit is 'n verskuiwing van die tradisionele stelsel van plaasinkomste ondersteuningsprogramme na 'n stelsel waar daar meer fokus geplaas word op produksie- en prysrisikobestuur met staatsgesubsidieerde oesversekering as die primêre instrument.

Direkte betalings- en teensiklieseprogramme sowel as die "Average Crop Revenue Election" (ACRE) program is opgehef vir alle kommoditeite. Die enigste uitsondering wat gemaak is, is t.o.v. VSA "Upland" katoen wat die enigste kommoditeit is wat vir die nuwe veiligheidsnetprogram in aanmerking sal kom. Hierdie program bekend as STAX (Stacked Income Protection Plan) gee gesubsidieerde inkomsteversekering vir katoenboere en is ter aanvulling van die versekeringsdekking wat alreeds beskikbaar is onder die Federale Oesversekeringsprogram.

STAX sal die premies subsidieer van versekeringspolisse wat katoenboere uitneem om verdere inkomsteverliese te dek wat groter is die inkomsteverliese wat normaalweg deur die standaard oesversekeringspolisse gedek word. Die Federale Regering sal ongeveer 80% van hierdie premies subsidieer. Die Federale Regering sal ook die administratiewe en operasionele koste van die versekeringsmaatskappye wat STAX aanbied, deels subsidieer. Onder die STAX-program sal 'n betaling ook net gemaak word wanneer die werklike inkomste van

'n distrik daal na minder as 90% van die distrik se verwagte inkomste. STAX bied dekking vir inkomstedalings van tussen 10% tot 30% van verwagte inkomste. Die STAX-program het op 1 Augustus 2015 in werking getree.

Die Bemarkingleningsprogram (Marketing Loan Program – MLP) sal steeds vir VSA katoenboere beskikbaar wees. Die leningskoers onder hierdie program is gebaseer op die wêreldkatoenprys en word bereken as die gemiddeld van die twee voorafgaande bemarkingsjare se katoenpryse, maar wat nie laer as 45 VSA c/lb of hoër as 52 VSA c/lb sal wees nie, m.a.w. solank wêreldpryse bokant 52 VSA c/lb bly sal daar geen subsidie onder hierdie program uitbetaal word nie.

Die GSM-102 program (Short Term Export Credit Guarantee Program) sal ook van krag bly met die verskil dat die leningstermyn van 36 maande tot 24 maande verkort is. Hierdie program fasiliteer die uitvoer van kommoditeite deur die verskaffing van staatwaarborge aan kommersiële banke wat andersins onwillig is om krediet vir uitvoere te verskaf.

Onder die vorige 5-jaar Plaaswetsontwerp het uitbetalings ten opsigte van die VSA se katoenondersteuningsprogramme gemiddeld \$1.1 miljard per jaar beloop. Uitbetalings onder die nuwe 5-jaar VSA Plaaswetsontwerp sal na raming slegs een derde beloop van die uitbetalings onder die vorige bedeling. Die verminderde ondersteuning vir katoen neem dan ook die insentief om katoen te plant in 'n groot mate weg vir baie VSA boere wat die geleentheid laat vir katoenboere van ander lande om hulle marktaandeel te vergroot. 🌐

Bron: OPSOMMING VAN 'N ARTIKEL DEUR ANDREI GUITCHOUNTS (ICAC) WAT IN DIE MEI/JUNIE 2015 UITGAWE VAN DIE ICAC SE "COTTON: REVIEW OF THE WORLD SITUATION" VERSKYN HET.

Nasionale kultivar-aanbevelings vir katoen – 2015/16

Kultivaraanbevelings vir katoen word deur Katoen SA in oorleg met kundiges in die katoenbedryf gedoen.

Die kultivars wat vir die onderskeie gebiede aanbeveel word, is volgens wet geregistreer vir aanplanting in die RSA. Met die opstel van hierdie aanbevelings is die volgende aspekte in aanmerking geneem:

- Opbrengs
- Vesellengte
- Veselsterkte

- Mikronêr
- Veselpersentasie
- Goeie aanpasbaarheid en siekte verdraagsaamheid.

Die aanbevelings is na oorweging van hierdie faktore per gebied gedoen. Die streke is ingedeel volgens temperatuur en hoogte bo seespieël.

Die aanbevelings per gebied sluit die volgende in:

- Kultivars met aanvaarbare potensiaal
- Plantdatums vir elke kultivar
- Optimum plantpopulasie per kultivar.

Kultivaraanbevelings vir 'n gebied is nie volgens prioriteitsvolgorde nie.

Die grondtemperatuur moet verkieslik 5 aaneenlopende dae lank 18°C of hoër wees om vinnige ontkieming en opkoms te verseker. Die optimale planttyd is normaalweg tussen 15 en 31 Oktober. ☀

NASIONALE KATOEN KULTIVAR AANBEVELINGS VIR DIE 2015/16 PRODUKSIESEISOEN

Hierdie kultivars word vir al die gebiede (1 - 8) aanbeveel
These cultivars are recommended for all the regions (1 - 8)

DELTA 12 BRF DP 1240 B2RF CANDIA BRF*

*Naam kan verander na CANDIA BGRF

Saad van hierdie kultivar is beskikbaar vir gebiede 1 & 2
Seed of this cultivar is available for regions 1 & 2

DP 210 BRF Slegs besproeiingsgebiede / irrigation areas only

Hierdie kultivar word vir gebiede 6, 7 & 8 aanbeveel (net geskik vir handplukdoeleindes)
This cultivar is recommended for regions 6, 7 & 8 (only suitable for handpicking purposes)

PM 3225 B2RF

Hierdie kultivar word slegs vir toevlugsgebiede (Refugia) aanbeveel
This cultivar is recommended for refugia areas only

DELTA 18 RF

2015/16-produksieseisoen Produksiegebied Production region	Optimale plantdatum Optimal planting date	Besproeiing / irrigation		Droëland / dryland	
		Plantdatum Planting date Nie later nie as Not later than	Plantpopulasie Plant population Per ha	Plantdatum Planting date Nie later nie as Not later than	Plantpopulasie Plant population Per ha
GEBIED 1 / REGION 1  Benede Oranjerivier / Lower Orange River- Upington / Groblershoop Vioolsdrif / Goodhouse / Onseepkans	15/10 - 31/10 15/10 - 31/10	20/11 30/11	80 000 - 100 000 80 000 - 100 000	- -	- -
GEBIED 2 / REGION 2  Noord-Kaap / Northern Cape	15/10 - 31/10	5/11	80 000 - 100 000	-	-
GEBIED 3 / REGION 3  Noordwes / Northwest (Vryburg / Setlagole)	15/10 - 31/10	20/11	80 000 - 100 000	20/11	55 000 - 70 000
GEBIED 4 / REGION 4  Noordwes / Northwest (Rustenburg)	15/10 - 31/10	20/11	80 000 - 100 000	20/11	55 000 - 70 000
GEBIED 5 / REGION 5  Limpopo	15/10 - 31/10	20/11	80 000 - 100 000	20/11	55 000 - 70 000
GEBIED 6 / REGION 6  Loskop & Springbokvlakte / Flats	15/10 - 31/10	20/11	80 000 - 100 000	30/11 (Noordvlakte) 15/11 (Suidvlakte)	55 000 - 70 000 55 000 - 70 000
GEBIED 7 / REGION 7  Laeveld / Lowveld	15/10 - 31/10	30/11	80 000 - 100 000	30/11	55 000 - 70 000
GEBIED 8 / REGION 8  KwaZulu-Natal	15/10 - 31/10	30/11	80 000 - 100 000	30/11	55 000 - 70 000

Aalwurmpeste bly 'n kopseer vir katoenprodusente

Prof Driekie Fourie

Aalwurmnavoring op katoen in Suid-Afrika is tot onlangs grootliks deur Me Jeannie van Biljon, wat tot met haar aftrede by die Landbounavorsingsraad se Instituut vir Industriële Gewasse (Rustenburg) werksaam was, behartig. Hierdie navorsing het getoon dat aalwurmpeste een van die belangrikste knelpunte vir katoenprodusente en die -bedryf is.



Fig. 2. Knoppe op die wortels van 'n katoenplant wat besmet is met knopwortelaalwurms.

Alhoewel parasitisme deur 'n verskeidenheid van plantparasitiese aalwurms die produksie van plaaslike katoengewasse bedreig, is knopwortelaalwurm (*Meloidogyne incognita* ras 4) die mees prominente gevolg deur letsel- (*Pratylenchus* spp.) en verdwergingsaalwurms (*Nanidorus* en *Paratrichodorus* spp.). Individue van hierdie drie aalwurm-groepe het verskillende voedingswyses, nl. knopwortelaalwurms voed diep binne in die vaatstelsel van die wortel terwyl letsel- en verdwergingsaalwurms onderskeidelik in meer oppervlakkige korteks en parenchiumweefsel voed. Bognondse simptome wat deur aalwurmpeste veroorsaak word, is dikwels sigbaar as kolle/gedeeltes in lande waar plante swak groei/onderpresteer (Fig. 1) en sodoende tot oesverliese lei. Indien knopwortelaalwurms die probleem veroorsaak, is galle/knoppe op wortels van 'n geïnfecteerde katoenplant gewoonlik met die blote oog sigbaar (Fig. 2). Ondergrondse skade wat deur

letselaalwurms veroorsaak word, is gewoonlik as verbruining/donker verkleuring van die wortels sigbaar terwyl parasitisme deur stompwortelaalwurms verkorte en stomp wortels tot gevolg het.

'n Ander probleem wat die skade wat aalwurmpeste veroorsaak kan vererger, is die voorkoms van 'n aalwurmpes (bv. knopwortelaalwurms) sowel as 'n patogeeniese fungus bv. (*Fusarium* sp). Hierdie twee patogene vorm 'n belangrike siektekompleks wat katoenplante kan laat afsterf.

Beheer

Alhoewel verskeie sinteties-vervaardigde aalwurmdoders in Suid-Afrika op katoen geregistreer is, bly die beheer van plantparasitiese aalwurms wat dié gewas betref 'n uitdaging. Dit is voorts 'n duur strategie. Die effektiewe toediening en werking van sintetiese aalwurmmiddels is ook onderhewig aan wisselende omgewingstoestande. 'n Verdere struikelblok is dat

>>> 17



Fig. 1. 'n Gedeelte in 'n katoenland waar plante verdwerg is en swak groei en ontwikkeling toon as gevolg van besmetting met knopwortelaalwurms.

(Foto's: DRIEKIE FOURIE)

hoogs effektiewe, Klas 1 aalwurmdoders ook toenemend van die mark onttrek word. 'n Voorbeeld is bv. aldicarb wat sedert 2011 nie meer beskikbaar is nie. Ook van belang is dat geen sintetiese aalwurmdoder katoengewasse vir die duur van 'n hele groeiseisoen teen aalwurmpeste kan beskerm nie. Dus behoort produsente nie net op hierdie strategie staat te maak nie.

Alhoewel wisselbou 'n wesenlike bydrae kan lewer wat die vermindering van aalwurmpeste se bevolkings in landbougronde betref, is gewasse wat in wisselbou met katoen geplant word (bv. mielies, grondbone, sonneblom) ook vatbaar vir veral knopwortel- en letselaalwurms. Dus bly getalle van hierdie aalwurmpeste opbou in katoenproduserende gebiede en word die probleem net groter.

'n Langtermyn wisselbouproef wat egter deur Me van Biljon in die Vaalharts Besproeiingskema gedoen is, het gedui dat winter aanplantings van koring en hawer aanvanklik 'n afname in knopwortel- en letselaalwurmbevolkings tot gevolg gehad het. Aan die einde van hierdie projek wat oor vier aaneenlopende seisoene gestrek het, het die getalle van hierdie aalwurmgroepe egter weer begin toeneem. Lae grondtemperatuur in wintermaande, wat in hierdie geval voorkom in plaaslike katoenproduksiegebiede, is egter ook bekend om tot 'n afname in plant-parasitiese aalwurmbevolkings te lei.

'n Effektiewe strategie wat in ander wêreldlande gebruik word om bv. knopwortelaalwurmbevolkings in katoenproduserende gebiede te verlaag, is die gebruik van weerstandbiedende kultivars. Dit is egter nie 'n opsie vir plaaslike katoenprodusente nie aangesien die toetsing van konvensionele katoenlyne wat tolerant is teen die knopwortelaalwurm *M. incognita* ras 4 en wat plaaslik ontwikkel is deur navorsers by die LNR-IIG, gestaak is weens oorheersing van die mark deur geneties gemanipuleerde kultivars. Met die toenemende onttrekking van hoogs effektiewe sintetiese produkte van die plaaslike mark, word dit egter toenemend belangrik dat weerstandbiedende kultivars met hoë opbrengspotensiaal en veselkwaliteit ontwikkel en vrygestel word vir gebruik deur katoenprodusente.

Navorsing deur Me van Biljon het ook aangedui dat alhoewel verskeie biologiese produkte sedert 1992 geëvalueer is op plaaslike katoengewasse, dit nie as 'n enkel strategie bevredigende resultate gelewer het nie. In ander eenjarige

gewasse, soos bv. mielies en sojabone is soortgelyke resultate verkry deur plaaslike nematoloë. Geharde toestande waarin eenjarige gewasse geproduseer word, bemoeilik bv. die vestiging en vermeerdering van sulke lewende, biologiese organismes en kan dus ook hul effektiwiteit wat aalwurmbeheer betref strem.

Om sogenaamde produkte dus in te sluit in 'n geïntegreerde pesbeheerprogram in katoen is waarskynlik nie winsgewend nie. Die grondkwaliteit in katoenproduserende gebiede behoort egter verbeter te word en kan gedoen word deur die toediening van hoendermis (2 ton/ha drie weke voor plant) soos ook voorheen deur navorsing van Me Van Biljoen gedemonstreer is. Dit is egter belangrik dat die prys van so 'n organiese produk ekonomies regverdigbaar moet wees vir die produsent.

Die "huis-toe-neem" boodskap is dat die status van aalwurmpeste, in lande waar plaaslike katoenprodusente beplan om dié gewas te plant, bekend moet wees. Voorts behoort kultivars wat swak gashere is van die aalwurmpes ter sprake (bv. *M. incognita* ras 4) as wisselbougewasse oorweeg te word vir aanplanting. Daarmee saam behoort 'n geregistreerde aalwurmdoder teen die geregistreerde dosis toegedien te word veral in lande waar 'n hoë aalwurmbevolkingsdruk teenwoordig is.

Die realiteit is dat daar geen maklike uitweg is om aalwurmpeste onder beheer te hou nie. Dus behoort die doel eerder te wees om getalle van hierdie peste so laag as moontlik te hou sodat katoenproduksie winsgewend in aalwurmbesmette lande gedoen kan word. Verbetering van die grondkwaliteit in plaaslike katoenproduksie is 'n verdere belangrike konsep wat nagestreef behoort te word. Die toevoeging van organiese materiaal, hetsy deur die inwerk van hoender-/kraalmis of die plant van dekgewasse waarvan die bogrondse dele dan ingewerk word, behoort stelselmatig ingestel te word. ☺

Prof Driekie Fourie is nie 'n kundige wat aalwurmnavoring op katoen betref nie, maar het 'n wye kennis van aalwurmnavoring wat eenjarige gewasse betref.

Kontakbesonderhede: Driekie Fourie, Eenheid vir Omgewingswetenskappe en Bestuur, Noordwes Universiteit, Potchefstroom, Privaatsak X6001, Potchefstroom, 2520, Tel no: 018 293 3638; epos: driekie.fourie@nwu.ac.za.

Old Southern Definition of Cotton

Cotton is the overcoat of a seed that is planted and grown in the Southern states to keep the producer broke and the buyer crazy. The fibre varies in colour and weight and the man who can guess nearest the length of the fibre is called a cotton man by the public, a fool by the farmer and a poor business man by his creditors. The price of cotton is determined in New York and goes up when you have sold and down when you have bought.

A buyer working for a group of mills was sent to New York to watch the cotton market and after a few days of deliberation wired his firm to this effect: "Some think it will go up, some think it will go down. I do too. Whatever you do will be wrong. Act at once."



At last: A great cotton success story



It is well documented how thousands of hectares of once highly productive agricultural land has been relegated to an unproductive state since land claims were introduced.

A classic example is the thousands of hectares below the Flag Boshielo Dam in the Greater Sekhukhune District of Limpopo Province. This region is irrigated out of the Olifants River and has a high cotton profit potential of at least R20 million per year. After various attempts to get the many irrigation systems going again, at last there is a ray of hope on the horizon. In the tiny village of Ditcheung a success cotton story has unfolded. Hopefully this attempt at poverty alleviation will spread and enable many communities to become self-sufficient instead of being a burden.

This success cotton story starts with a Tribal Chief who understands how important it is to prioritize the needs of his subjects. Kgoše Matlala is just such a leader. This is reflected in the strategic partnership the Kgoše registered with Mr. Jannie Terblanche, amongst other a highly successful cotton farmer from Marble Hall. Importantly this partnership is in line with Government policy, in contrast to previous attempts where land was rented out to tenants, which always caused suspicion. Kgoše Matlala's cotton model is successful because it is firstly a profit-sharing venture and secondly it is based on a totally open book policy. All transactions are totally open to scrutiny by the community, and this has earned the trust of all concerned.

In summary, this cotton model has proved to be so successful because it is obviously a win-win situation. Another important factor which contributed towards the successful implementation, was the involvement of the Department of Rural Development and Land Affairs which supplied finance to ensure the future sustainability of infrastructure improvement. One of the principles of the cotton project was that a maximum amount of manual labour would be utilized wherever possible. The hands used, approximately 260 people, to harvest the 410 ton cotton crop, earned the community in excess of R 435 000 which they would not have seen if this project hadn't been initiated.

Hopefully this success story will inspire and encourage more communities to get involved in similar projects. Just have faith and patience and don't get disheartened. ☺

Percy Macaskill, Mentorship Programme, Cotton SA



Outlook on Textiles

On the international demand side, polyester fibre is the main competitor for cotton lint. Cotton's share of the global textile fibre end-use market declined from about 68 per cent in 1960 to approximately 28 per cent in 2013, and is expected to continue to decline during 2014 and 2015. Furthermore, polyester fibre prices declined during 2013/14 and remained more competitive than cotton prices.

The US fibre and yarn producers have begun to pass on costs through to customers because they were hit hard in the past months by cost increases, but price increases are still lagging behind the escalating cost of materials. The recent skyrocketing of petroleum prices have been a punch in the gut for many manufacturers, particularly man-made fibre producers. Overall polyester staple fibre prices are up about 14 US cents per pound from a year ago. One spinner in the USA have made the following comment: "Our customers have disappeared. We had to look hard for opportunities. To be successful you have to focus on lead times and customer service, almost to a point where price (also vital) is secondary." The rising cost of energy also played a role.

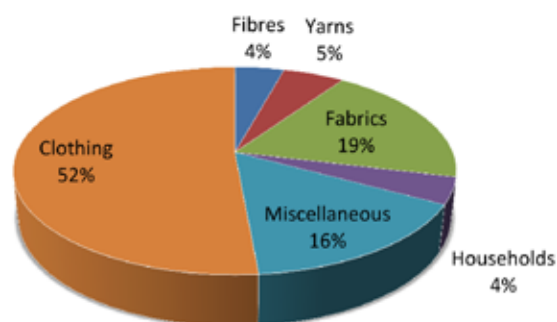
The situation in South Africa is pretty much the same as in the US. Polyester fibre is also the main competitor for cotton in South Africa. During the first six months of 2015 South Africa has imported 5026 tons of polyester staple fibres at an average fob price of R17.11/kg, while 10694 tons of cotton fibre was imported at an average fob price of R17.37/kg.

The graph below gives a comparison of the volume of imports of textile fibres for the first six months of the year.

The capacity utilisation in the textile industry is below 70% while that of clothing is below 80%, in both sectors due to insufficient demand. The reason for that could be low priced imported goods. The production price index (PPI: 2012=100) for the first half of 2015 show a 5% increase for textiles and 4.7% for clothing (which is more than the average of 3.3% for all final manufactured goods). The consumer price index (CPI: 2012=100) show a 4.4% increase for all items while it increased by 6% for clothing.

In the last couple of years we have seen that the volume of production index (2010=100) showed a steady decline in the sector for spinning, weaving and finishing, as well as in the knitting sector. The volume of production index for the spinning, weaving and finishing sector, however, showed a

Total Imports : R 'mill (Jan-June 2015)



Total imports for January to June 2015

5.6% increase for the first six months of 2015 compared to the same period in 2014. During the same period the knitting sector showed a decline of 10.5%.

During January to June 2015 textiles and clothing to the value of a total of R16.7 billion have been imported.

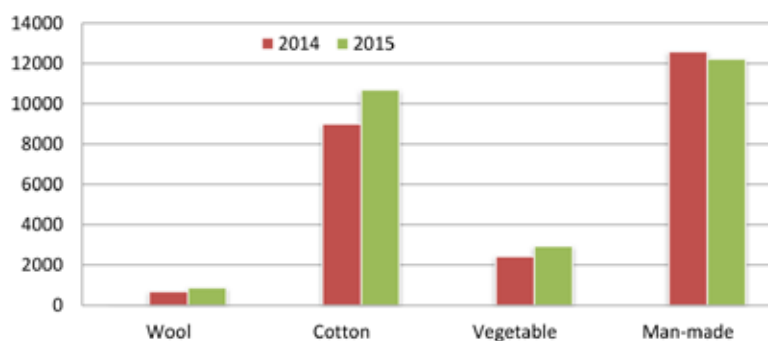
Total employment in the textile and clothing industries continue to decline.

Retail trade sales continue to grow. During the first half of 2015 consumers spent more than R78 billion on textiles, clothing and footwear. This is nearly 7% more than the same period in 2014.

Although the statistics show a negative picture of the local textile industry in general, production of yarns, woven fabrics and clothing shows a turn for the better. We are confident that the cluster initiative to assist the local industry for sustainable textiles and clothing, especially in the cotton sector, would be the injection to restore the local textile industry to its rightful place in the economy. ☺

Helena Claassens, Cotton SA

Textile fibre imports (tons) Jan-June



Volume (tons) of imports of textile fibres during the first 6 months of the year



*"THE FIT IS EXEMPLARY,
MUM, AND LOOK, I CAN
SEE THE COTTON MARK!"*



*P*eople who know believe in the Cotton Mark. When the Cotton Mark guarantees that the shirt, the sheet, the towel or anything else you're buying is quality-tested, 100% pure cotton, you can be sure it is.

The Cotton Mark tells you that your cotton purchase will hold its shape, hold its colour and resist shrinking.

To be sure you're getting quality, look first for the Cotton Mark.

And if you can't find it, ask for it.

It's your right to get our guarantee.

*Pure cotton and Quality
and that's a promise.*

