

# KATON COTTON SA

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# Geseënde Kersfees



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Evert

PERSKEVEL '17



# INHOUD CONTENTS

Voorwoord / Preface	Pg 3
Textile Exchange Sustainability Conference	Pg 4
The Sustainable Cotton Cluster Delivers Results	Pg 6
Total Employment in Cotton Production	Pg 7
Ontblaring	Pg 8
Nasionale Kultivarproewe	Pg 9
Katoen Markverslag	Pg 10
Cotton News / Katoennuus	Pg 12
Vlekbesie Skade	Pg 14
Effect of Nitrogen Levels on Double-Skip Row Cotton Production Practises	Pg 16
Environmental Friendly Pro- ducts for Nematode Control	Pg 18
How to Care for Cotton	Pg 20
Outlook on textiles & clothing	Pg 21
Stand van damme en klimaatsvooruitsigte	Pg 22

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## VOORWOORD / PREFACE

Die plantseisoen is in volle gang en planttoestande is oor die algemeen baie gunstig. Huidige vlakke van besproeiingsdamme is 7% hoër as die ooreenstemmende tydperk verlede jaar terwyl goeie voorseisoen reënneerslae in meeste van die produksiegebiede voorgekom het. Daar is 'n sterk historiese korrelasie tussen die pryse van die onderskeie gewasse in 'n spesifieke seisoen en die aangeplante areas van daardie gewasse in die daaropvolgende seisoen. In die geval van katoenproduksie het dit meer as een seisoen geduur voordat gunstige pryse tot wesenlike hoër produksie in die daaropvolgende seisoen gelei het. Vroeë voorlopige skattings vir die 2017/18-plantseisoen dui op 'n verwagte oes van tussen 200 000 tot 250 000 bale vesel of 'n styging van meer as 160% teenoor die vorige jaar.

Katoenproduksie in Suid-Afrika het sover terug as in 1998/99 laas die kerf van 200 000 veselbale oortref! Hierdie toedrag van sake het dan ook tot gevolg dat bestaande pluiskapasiteit of opgradeer of vergroot moet word. Groot investeringe ten opsigte van oes- en pluiskapasiteit word gemaak wat beteken dat die bedryf groter stabiliteit en groei oor die medium tot langer termyn kan verwag. Gunstige toestande was nie alleen die rede vir hierdie dramatiese styging nie. Die Clusterprogram wat die katoenbedryf saam met die regering in 2014 in werking gestel het, het tot hernude belangstelling in katoen aanleiding gegee en kan die positiewe uitkomst van die inisiatief tot dusver, nie genoeg beklemtoon word nie!

Verder word die verwikkelinge rondom die oornam van Monsanto deur Bayer tesame met die toetred van BASF tot die katoensaad- en onkruidoderbedryf en die impak daarvan op die SA katoenbedryf, met groot belangstelling vanuit plaaslik geleedere gevolg. Die verwagting is dat die finale aankondiging oor dié oornames vroeg in 2018 bekend gemaak sal word!

Gelukkig kom daar aan die einde van elke jaar 'n welkome rustyd waar ons op ons geestelike welvaart en familielewe kan fokus. Die Direksie en personeel van Katoen SA wil elkeen in die bedryf en verwante bedrywe sowel as ons adverteerders 'n baie geseënde Kerstyd en voorspoedige 2018 toewens.



Hennie Bruwer

The planting season is in full swing and planting conditions are generally very favourable. The current levels of irrigation dams are 7% higher than the same period last year, while good pre-season rainfall has occurred in most of the production areas. There is a strong historical correlation between the prices of various crops in a particular season and cultivated areas of those crops in the next season. In the case of cotton it took more than one season before favourable prices resulted in substantially higher production in the following season. Early preliminary estimates for the 2017/18 planting season indicates an expected crop of between 200 000 to 250 000 bales of lint or an increase of more than 160% over the previous year.

Cotton production in South Africa as far back as 1998/99 last exceeded levels of 200 000 lint bales! This situation has also necessitated the upgrade or enlargement of existing ginning capacity. Large investments in respect of crop and ginning capacity are being made which means that the industry can expect greater stability and growth over the medium to longer term. Favourable conditions were not only the reason for this dramatic increase. The Cluster program, implemented in 2014 by the cotton industry together with the government, sparked renewed interest in cotton and the positive outcomes of the initiative so far, can not be stressed enough!

Furthermore, the developments surrounding the acquisition of Monsanto by Bayer together with the entry of BASF to the cotton seed and herbicide industry and its impact on the South African cotton industry, are being followed with great interest from local ranks. It is expected that the final announcement on the acquisitions will be announced in early 2018.

Fortunately, at the end of each year there is a respite where we can focus on our spiritual well-being and family life. The Board and staff of Cotton SA wish everyone in the industry and related industries as well as our advertisers a very merry Christmas and prosperous 2018.



# 2017 TEXTILE EXCHANGE SUSTAINABILITY CONFERENCE

2017 Textile Sustainability Conference  
THANK YOU TO OUR SPONSORS



The Textile Exchange's Sustainability Conference was held near Washington, D.C. during the week of October 9-13. According to the event organisers this was their largest conference to date, with over 500 people participating from 37 countries and 328 different companies.

The Textile Exchange (TE) is a global non-profit organisation that works closely with their members to drive industry transformation in preferred fibers, integrity and standards and responsible supply networks. They identify and share best practices regarding farming, materials, processing, traceability and product end-of-life to reduce the textile industry's impact on earth's water, soil and air, as well as on the human population. The Sustainable Cotton Cluster (SCC), through Cotton SA are members of the Textile Exchange. Other key stakeholders in the cluster's integrated value chain who are also TE members include OrganiMark and Woolworths.

The SCC, (as Cotton SA) was the gold sponsor of the 2017 TE's Sustainability Conference and played a prominent role during this international event. Heinrich Schultz, Executive Manager of the SCC was given the honor of acting as programme director for the opening day of the conference.

The TE inspires and equips its members to accelerate sustainable practices in the textile value chain, focusing on minimising the harmful impacts of the global textile industry and maximizing its positive effects. For us, as a South African cotton textile and apparel programme, the TE provides meaningful international benchmarking opportunities. The SCC again extended an invitation to some of our cluster stakeholders to join us at the 2017 Sustainability Conference. In 2016 the invitation was extended to stakeholders representing farmers and ginners, whilst the focus for this year was on the retailers.

The Sustainable Cotton Cluster's creative exhibition table, depicting the value chain stakeholders through special, handmade dolls, was one of the conference 'showstoppers'. Two sets of dolls, representing the five value chain pillars, namely farmers, ginners, spinners, manufacturers and retailers, were used to illustrate the industry role-players before and after the integrated value chain approach. The innovative way in which this integrated value chain was displayed created a powerful connection point to engaged with the delegates during the informal networking sessions. The fact that South Africa had three like-minded brands at the TE Conference was proof of how far ahead we are of other brands in implementing integrated supply chain programmes. Moving from a concerning, confused industry to a place where we can have various stakeholders around one table, has in three years resulted in huge successes as an outcome of the SCC programme.





## WHAT OUR DELEGATES HAD TO SAY ABOUT THE CONFERENCE



**Back:** Kyle Matthews (MRP Group), Heinrich Schultz (SCC) and Ralph Jewson (Woolworths).  
**Front:** Noël Paulson (Edcon), Imraan Bux (Imraan Textiles) and Alison Lloyd (Woolworths).

**Alison Lloyd:** "It was an incredible experience to be able to attend the Textiles Exchange's conference in Washington this year. As a committed responsible retailer, we are well on our journey to ensuring we drive sustainable fibres but the conference emphasised the Sustainable Development Goals and highlighted how we need to work together to deliver these. Collaboration across all stakeholders is critical as we focus on some of the biggest challenges being water scarcity as well as deforestation leading to climate change. Woolworths needs to work together across the Woolworths holdings group to enable traction in these areas and are in a strong position to do so with both textile and food businesses."

**Noël Paulson:** "On behalf of Edcon, I would like to sincerely thank the Sustainable Cotton Cluster for the Invite to the Sustainable Textile Exchange Conference in Washington. The Conference way exceeded my expectations and I can't begin to thank the Cluster for the very generous opportunity to attend a Conference of that magnitude with the high level of content that was exhibited and shared. Considering my new additional portfolio, which encompasses Strategic Sourcing and Fabric Strategy, the timing could not have been better. I know we as a group of South African retailers all left Washington with a very different perspective on what sustainability means in the Textile sector and what we as retailers need to seriously consider as we proceed on our respective journeys as Responsible Retailers. I think the challenge comes in, in imparting the same sense of responsibility and understanding within our Buyers and the respective Supply Chains and I definitely see the Sustainable Cotton initiative as being the vehicle to drive this learning across the total supply chain. I took with me many learnings and highlights, don't underestimate the impact this opportunity to attend this Conference had on us - it left its mark! A sincere thank you!"

**Ralph Jewson:** "Attending the 2017 Textiles Exchange Conference in Washington was a memorable and enlightening experience. It was very clear that the SDG's need to inform our future thinking as business and individuals in the 'new normal' environment we find ourselves in as retailers. Also, quite evident to me was that in isolation success will be limited and take time, while in collaboration with other retailers and our supply chains we will build momentum quicker and achieve far greater outcomes. Of great benefit was the opportunity to gain knowledge through the conversations with like-minded retailers and individuals across the fibre spectrum and on the issues that we as businesses face - from animal rights right through to waste management, deforestation, climate change, pollution and water scarcity. Thank you to the Cotton Cluster for making attending this conference possible - the value of this was significant to my future daily operations and depth of knowledge."

**Kyle Matthews:** "On behalf of the Mr Price Group a sincere thank you to the Sustainable Cotton Cluster team and to all that made the 2017 Textile Exchange Conference possible. What an incredible opportunity to engage with a broad spectrum of global retailers and industry roll players on the sustainable development of the retail space. The energy behind the SDG's was showcased throughout the conference with much development underway around closed loop clothing and textiles, with advancements in recycling and cellulosic yarns. This certainly sets the standard for sustainable development and speaks to the work being done to broaden the scope of our already highly successful integrated supply chain programmes to include other closed loop sustainable fibres."

Tanya Aucamp - OrganiMark

## SOME OF THE KEY LEARNINGS AND HIGHLIGHTS, TO NAME BUT A FEW, FROM THE CONFERENCE INCLUDED

- The importance of aligning business strategy with the Sustainability Development Goals (SDG's of the UN) - empowering discussion on how the international brands are including the SDG's in their business model and even linking them to their KPI's. The power of change lies within every individual.
- The focus on Human Rights and sustainable development - better work environments improves people's morale and their performance. The importance of always acting in an ethical and socially responsible manner.
- The Age of the New Normal - The importance of Retailers (Brands) driving their fibre strategy and owning it - the demand model (much aligned to our ISCP)
- The negative impact of fast fashion, resulting in second hand clothes flooding the markets. Unlocking the value proposition with more focus on opportunities to recycle (circular economy thinking and design).
- Various speakers focused on building Sustainable Supply Networks - the importance of reaching beyond Tier 1 suppliers and go further upstream (aligned with our ISCP's).
- The shift to transparent supply chains from Tier 1 to Tier 2 with M&S and H&M's presenting their learnings and success stories.
- Interesting information on new waterless technologies being introduced e.g. Dry dyeing technologies
- H&M remains a brand worth following. Their presentation on "Catalyst of Change", with the intent of 100% Circularity by 2030 was a powerful learning.
- CottonConnect also pointed out that including not only the farmers, but also the Ginners; Spinners and Manufacturers in the broader sustainability strategy discussions was key and very much aligned to our journey were the Sustainable Cotton Cluster is providing the vehicle for this level of collaboration in South Africa.



# THE SUSTAINABLE COTTON CLUSTER DELIVERS REAL RESULTS WITHIN 3 YEARS

At the beginning of the new millennium the South African textile and clothing sectors faced serious challenges. Following China's inclusion in the World Trade Organisation in 2001, local textile and clothing manufacturers suffered because of the cheaper imports of Chinese fabrics and finished products. Employment in the sectors slumped dramatically and more than 100,000 textile and clothing jobs were lost.



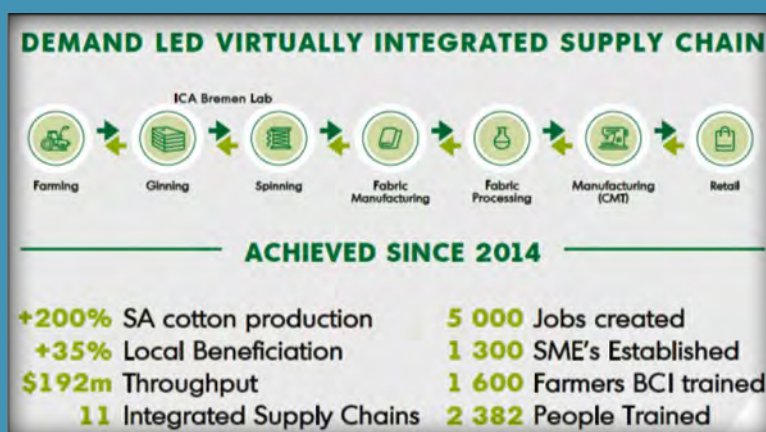
The programme is funded by the Department of Trade and Industry's (the dti) Competitiveness Improvement Programme (CIP), and managed by the IDC and the CTCP Desk, which was structured to drive competitiveness and increase productivity and employment opportunities in the South African textile and clothing sectors.

The success of this demand-driven initiative is the fact that this is not only a virtual integrated programme, but a programme where retailers such as the Mr Price Group, Edcon, Woolworths and Ackermans set their competitive goals aside and all meet face to face, as retailers who are determined to set the standards for sourcing sustainably produced South African cotton.

Realising the opportunity for growth, the Sustainable Cotton Cluster was formed in 2013.

This national Cotton Cluster is an initiative of Cotton SA, Government as well as like-minded cotton industry value chain stakeholders that include the farmers, ginners, spinners, manufacturers and retail industries.

The Sustainable Cotton Cluster provides a coordinated platform to all the stakeholders in the cotton value chain to ensure the growth and sustainability of cotton in Southern Africa. This creates a unique integrated supply chain program (ISCP), that is managed by OrganiMark, and is driven by retail demand and built on virtual partnerships amongst supply chain stakeholders. It supports 'near sourcing' and 'quick response' and provides for supply chain transparency, price surety and stakeholder trust.



Sustainability is to create a balance between growing profitability, protecting the environment and promoting social responsibility. It is imperative for the future of cotton to be accountable in the

international arena and adhere to international standards. This is possible with sustainability and traceability.

*Tanya Aucamp - OrganiMark*



# ESTIMATES OF TOTAL EMPLOYMENT IN COTTON PRODUCTION

International Cotton Advisory Committee  
Publication: Review of the World Situation Vol.70



Building on previous work, the ICAC recently published a paper estimating the total employment in the cotton production sector. Total employment figures include not only cotton growers, but also employment directly related to cotton production such as labour used during harvesting as well as those in cotton production related sectors such as marketing.

Estimating the total number of cotton growers and others employed in cotton production helps to assess the size and importance of the cotton sector in the country's economy and employment. In addition, knowing how many persons work in cotton production around the world provides an indication of the global importance of the cotton agricultural sector in terms of employment.

China has by far the largest number of growers and employs the most people in cotton production, with India in second place. This is due to the fact that the average farm size in both countries is very small, that

very few farms are mechanized and that these two countries are the two largest cotton producers in the world. However, China has been mechanizing its cotton production in recent seasons due to the high cost of labour, and one should expect the total labour involved in cotton production to decrease over time.

Cotton production also provides significant employment in Eastern and Southern Africa, which is the second largest region.



## COUNTRIES WITH MORE THAN 200 000 COTTON GROWERS

(ESTIMATES)	NO. OF COTTON GROWERS	
	LOWER EST.	HIGHER EST.
<b>WEST AFRICA</b>		
Burkina Faso	325 000	325 000
Cameroon	206 491	206 491
Chad	234 128	234 128
<b>EASTERN &amp; SOUTHERN AFRICA</b>		
Ethiopia	240 000	240 000
Malawi	200 000	483 000
Mozambique	200 000	250 000
Tanzania	389 761	389 761
Zambia	250 000	250 000
Zimbabwe	200 000	250 000
<b>ASIA</b>		
China	24 000 000	46 000 000
India	5 800 000	7 700 000
Myanmar	503 566	503 566
Pakistan	1 300 000	1 837 000
<b>CENTRAL ASIA</b>		
Kazakhstan	250 000	250 000
Uzbekistan	440 000	445 000
<b>WORLD TOTAL</b>	<b>36.4 million</b>	<b>61.5 million</b>
<b>WORLD TOTAL LESS CHINA</b>	<b>12.4 million</b>	<b>15.5 million</b>

## TOTAL EMPLOYMENT (GROWERS + COTTON PRODUCTION RELATED)

(ESTIMATES)	MILLIONS	
	LOWER EST.	HIGHER EST.
WEST AFRICA	3.6	3.7
EASTERN & SOUTHERN AFRICA	39.4	49.6
ASIA	93.4	128.9
CENTRAL ASIA	5.8	5.9
MIDDLE EAST	1.8	1.8
REST OF THE WORLD	2.5	3.3
<b>WORLD TOTAL</b>	<b>146.6</b>	<b>193.1</b>
<b>WORLD TOTAL LESS CHINA</b>	<b>116.6</b>	<b>137.1</b>



# ONTBLARING

**ONTBLARING IS EEN VAN DIE LAASTE AKSIES WAAR BESTUURSBESLUIE NOG 'N IMPAK OP WINS KAN HÊ.**

## VOORDELE VAN ONTBLARING:

- Eliminasië van die belangrikste bron van bolvlek en afvalmateriaal wat laer grade tot gevolg het.
- Vinniger en meer doeltreffende plukkeraksie.
- Die katoen is gouer droog van dou sodat pluk vroeër in die dag kan begin.
- Beter lugvloei verminder die kans op bolvrot.
- As gevolg van minder vog is daar minder risiko vir katoen wat oor langer tydperke in modules geberg moet word.

## BELANGRIKE PUNTE OM IN GEDAGTE TE HOU:

- Ontblaar voor die aanvang van ryp.
- Vermoë toediening van ontblaringsmiddels as reën voorspel word. Sommige ontblaringsmiddels is stadig om deur die blare opgeneem te word en sal afwas in die reën, wat lei tot onvolledige ontblaring.
- Hoër dosisse sal nodig wees vir jong gesonde blare.
- As toediening geskied in weer wat te warm is, kan dit tot gevolg hê dat jong blare op die plant "vasvries".
- Te koue temperature, lae humiditeit en waterstres kan die waslaag en dikte van die blaaroppervlakte verhoog, wat chemiese opname kan vertraag.
- Lae humiditeit kan ook opname verminder omdat chemikalieë vinniger op die blaar opdroog.
- Groter druppelgroottes of veelvoudige toedienings sal dieper penetrasie in die blaredak verseker.
- Die ontblaringseffek is gewoonlik 7 dae na toediening voltooi.



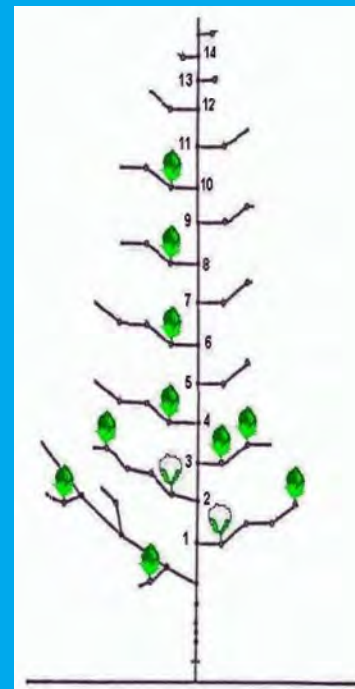
Ontblaring behels die gebruik van sintetiese chemikalieë om die tempo van blaarverlies en uitdroging te versnel ten einde te verseker dat die katoen tydig en doeltreffend ge-oes kan word. Vir suksesvolle ontblaring moet die blaar lank genoeg aan die lewe bly om die plant in staat te stel om 'n afspeenlaag te vorm waar die blaarstingel aan die stam heg. Sodra hierdie afspeenlaag gevorm het, val die blare af en is dit moontlik om skoon, droë en vlekvrê pluksel te oes. Die kuns is egter om die regte balans te vind. As jy te aggressief is met jou chemikalieë, kan die blaar sterf voor die afspeenlaag ontwikkel het, wat lei tot blare wat "vasvries" aan die plant en onnodige afval tot gevolg het. As jy aan die ander kant te min chemikalieë gebruik, word die afspeenproses nie gestimuleer nie wat weer lei tot onvoldoende blaarverwydering.

Bolvolwassenheid is die enkel belangrikste faktor wat oorweeg moet word wat betref die besluit oor wanneer om te ontblaar aangesien minimale rypwording na verwydering van die blare plaasvind. Voortydige ontblaring benadeel opbrengs sowel as veselkwaliteit terwyl laat ontblaring aanleiding kan gee tot verhoogde bolverrotting en kwaliteitsverlies as gevolg van blootstelling aan die natuur.

Die ontblaringsproses kan as 'n reël begin wanneer tussen 60% en 75% van die bolle oopgebars het en die jongste bol wat ge-oes kan word, ryp is. Om bolvolwassenheid na te gaan, kies een van die boonste bolle wat jy van plan is om te oes en sny dit deur met 'n skerp mes. Volwasse bolle sal moeilik deurgesny kan word, ook moet die vesel in die snyproses uitrafel, die saadhuid moet ligbruin wees terwyl die saadholte heeltemal gevul moet wees met geen jellie in die middel nie. In die figuur is bol 1 heel onvolwasse, bol 2 is so te sê volwasse en bol 3 is ten volle volwasse - net voor oopbars.



In teenstelling met die persentasie oopgebarste bol metode om vas te stel of die oes reg vir ontblaring is, is daar die NACB metode ("nodes above cracked boll") wat weer fokus op die onoorgemaakte gedeelte van die oes. Dit behels dat die plant ondersoek word om die heelboonste oopgebarste bol op die 1e posisie vanaf die stam te vind en dan die aantal stamnodes te tel tot by heelboonste 1e posisie oesbare bol. Navorsing het getoon dat wanneer daar 4 nodes of minder bo die boonste gebarste bol is, is dit veilig om ontblaringsmiddels te gebruik.



In die diagram hiernaas is die vrugdraende takke (VT) genummer 1-14. Die heelboonste oopgebarste bol op die 1e posisie vanaf die stam is VT2 en die heelboonste 1e posisie oesbare bol is VT10. Die NACB op hierdie plant is 8. Met die veronderstelling dat die bolle gemiddeld sal oopbars teen 'n koers van 'n node elke drie dae, sal die oes 4 NACB binne 12 dae bereik. Nodes sonder bolle word ook getel.

Ten slotte, besluite moet gemaak moet word op grond van vorige ondervinding want om te ontblaar is op die ou einde eerder 'n kuns as 'n wetenskap.

Koot Louw - Katoen SA



# Nasionale Katoen Kultivarproewe 2016/2017 seisoen

NAVORSING

Tilla van der Westhuizen en Piet Maja (LNR -IIG)

**D**ie afgelope seisoen was ses tot sewe cultivars, naamlik Candia BGRF (Bayer), Carla (Bayer), Delta12 BRF, DP1240 B2RF, DP1531 B2RF, DP1541 B2RF en PM3225 (Delta Pine Monsanto) ge-evalueer op ses lokaliteite, naamlik onder besproeiing by Loskop, Vaalharts en Upington en onder droëlandtoestande by Makhathini, Roedtan en Stella. Die proewe is suksesvol uitgevoer by vier lokaliteite, naamlik onder besproeiing by Loskop, Vaalharts en Upington en onder droëlandtoestande by Makhathini. Die twee droëlandproewe by Roedtan en Stella het nie ontkiem nie as gevolg van droogte en/of omdat dit te diep geplant is. Die beplande Januarie 2017 aanplanting in die Weipegebied het nie gerealiseer nie as gevolg van ongunstige weerstoestande.

Tabel 1. Opbrengs & veseleienskappe van die besproeiingsproef by LOSKOP

Kultivar	Candia BGRF	Carla	Delta 12 BRF	DP1240 B2RF	DP1531 B2RF	DP1541 B2RF
Plukselopbrengs (kg ha)	2454	2573	2544	2777	2683	2737
Vesel %	42.4	42.1	38.8	39.6	40.6	43.0
Veselopbrengs	1043	1087	984	1101	1087	1175

Lae opbrengste die gevolg van hewige vlekbesie infestasië.

Tabel 2. Opbrengs & veseleienskappe van die droëlandproef by MAKHATHINI

Kultivar	Candia BGRF	Carla	Delta 12 BRF	DP1240 B2RF	DP1531 B2RF	DP1541 B2RF	PM3225
Plukselopbrengs (kg ha)	1425	1481	1734	1729	2083	2008	1300
Vesel %	37.8	37.6	36.2	36.2	40.5	40.9	36.7
Veselopbrengs	539	557	644	624	852	831	477

Tabel 3. Opbrengs & veseleienskappe van die besproeiingsproef by VAALHARTS

Kultivar	Candia BGRF	Carla	Delta 12 BRF	DP1240 B2RF	DP1531 B2RF	DP1541 B2RF
Plukselopbrengs (kg ha)	4694	4369	4703	4886	4074	4327
Vesel %	45.6	42.6	39.7	42.5	44.3	43.8
Veselopbrengs	2141	1859	1868	2074	1808	1893

Tabel 4. Opbrengs & veseleienskappe van die besproeiingsproef by UPINGTON

Kultivar	Candia BGRF	Carla	Delta 12 BRF	DP1240 B2RF	DP1531 B2RF	DP1541 B2RF
Plukselopbrengs (kg ha)	6273	5969	6084	6919	6622	6546
Vesel %	43.5	42.6	39.4	41.8	42.9	42.2
Veselopbrengs	2732	2541	2414	2887	2842	2764

Die volledige verslag van die LNR-IIG kan afgelaai word vanaf Katoen SA se webblad: [www.cottonsa.org.za](http://www.cottonsa.org.za)



# KATOEN SA MARKVERSLAG SOOS OP 1 NOVEMBER 2017

In 2017/18 sal katoenproduksie na raming met 10% toeneem terwyl wêreld katoeneindvoorrade buite China na verwagting met 24% sal toeneem.

	A INDEKS <i>Gem. VSAc/lb</i>	AFGELEIDE RSA "PRYS" <i>Gem. SA c/kg</i>
Verlede week (23/10 - 27/10/17)	79.51	2465.93
Oktober 2017	78.60	2401.13
<b>Vandag (01/11/17)</b>	<b>79.25</b>	<b>2499.02</b>
September 2017	80.60	2363.39
Vandag 'n Jaar gelede	77.75	2343.79
Vandag twee jaar gelede	69.75	2154.04

Die **COTLOOK A INDEKS** is 'n daaglikse aanwyser van internasionale katoenveselpryse en is die gemiddeld van die 5 goedkoopste kwotasies (koste & vraag) van die belangrikste katoentipes wat internasionaal verhandel word, bestemming Verre Ooste.

Die International Cotton Advisory Committee (ICAC) verwag dat katoenproduksie in 2017/18 met 10% tot 25.6 miljoen ton sal toeneem hoofsaaklik as gevolg van 'n verwagte 11% toename in hektare weens die beter prysvooruitsigte vir katoen in vergelyking met mededingende gewasse.

Katoenproduksie sal na verwagting in al die grootste katoenproduserende lande styg. Die grootste toename word in die VSA verwag waar die katoenoes na raming met 23% tot 4,6 miljoen ton sal toeneem, wat die grootste oes in die afgelope 10 jaar sal wees.

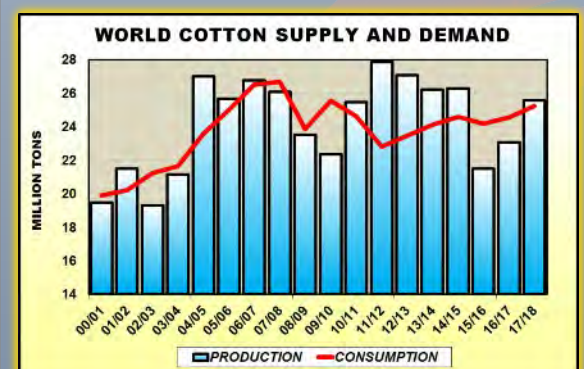
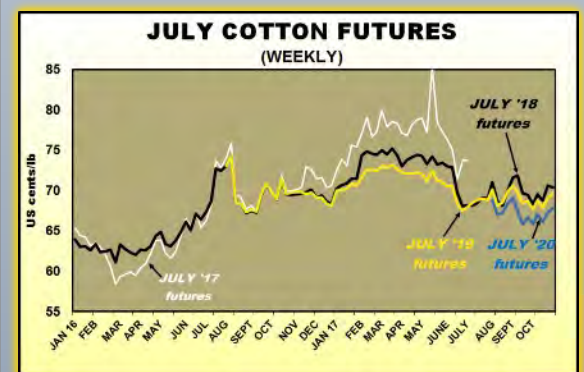
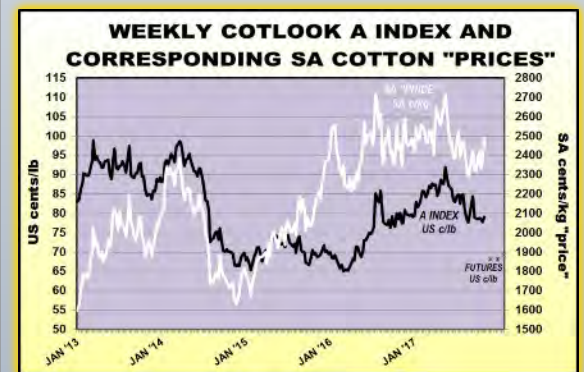
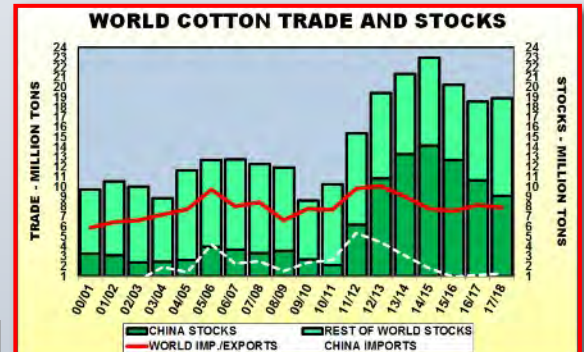
Alhoewel die ICAC verwag dat wêreld katoenverbruik in 2017/18 met ongeveer 2.7%

tot 25.2 miljoen ton sal styg, is dit nog steeds 9% benede die rekordverbruik van 2007/08. Katoen se aandeel in globale veselverbruik het geval van 38% 10 jaar gelede tot 27% tans. In vergelyking het poliëster se aandeel van globale veselverbruik toegeneem tot 67% tans.

Volgens die ICAC sal wêreld katoenhandel met 3% in 2017/18 afneem. Alhoewel wêreld eindvoorrade van katoen vir 2017/18 na verwagting onveranderd sal wees vanaf die vorige jaar, word geprojekteer dat wêreld katoeneindvoorrade buite China met ongeveer 24% sal toeneem in 2017/18.

Koot Louw - Cotton SA

Wat die plaaslike vooruitskouing betref, dui die 10e skatting vir die 2016/17 produksiejaar op 'n totale katoenoes van 84 611 bale vesel, 'n styging van 67% teenoor die vorige seisoen en onveranderd vanaf die vorige maand se skatting. Na skatting sal 82 611 bale geproduseer word van RSA geproduseerde katoenpluksel, 'n styging van 64% teenoor die vorige seisoen. Die balans van 2000 bale vesel het betrekking op verwagte Swaziland geproduseerde katoen wat deur die Swaziland pluismeule gepluis word.





PRODUKSIE STREEK	HEKTARE BESPROEING	HEKTARE DROËLAND	OPBRENGS BESPROEING kg katoen pluksel/ha	OPBRENGS DROËLAND kg katoen pluksel/ha	PRODUKSIE 200 kg bale katoenvesel	% VAN OES HANDGE- PLUK	% VAN OES SOVER GEPLUIS
<b>LIMPOPO PROV.</b>							
Loskop	2452	0	4455	0	19663	0%	85%
Noord & Suidvlakte	128	5105	4200	1390	13740	0%	85%
Dwaalboom/Thabazimbi	0	0	0	0	0	0%	0%
Limpopo Ander	467	45	4850	800	4142	0%	85%
Weipe	1078	0	4500	0	8974	0%	90%
<b>NOORD-KAAP</b>							
Vaalharts	1272	0	5701	0	13415	0%	86%
Benede Oranjerivier	410	0	3852	0	2922	0%	100%
Res van Noord-Kaap	557	0	5511	0	6491	0%	92%
<b>NOORDWES</b>							
Stella/Delareyville/Setlagoli	540	1477	2749	1015	5520	10%	100%
Taung	0	0	0	0	0	0%	0%
<b>KWAZULU-NATAL</b>	397	1500	2784	600	3640	69%	72%
<b>MPUMALANGA</b>	0	2913	0	764	4104	100%	75%
<b>OOS-KAAP</b>	0	0	0	0	0	0%	0%
<b>RSA TOTAL</b>	<b>7301</b>	<b>11040</b>	<b>4589</b>	<b>1065</b>	<b>82611</b>	<b>9%</b>	<b>87%</b>
Swaziland*	0	2000	0	600	2000	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		
<b>GROOTTOTAAL</b>	<b>7301</b>	<b>13040</b>	<b>4589</b>	<b>994</b>	<b>84611</b>	<b>11%</b>	<b>85%</b>

\* Besonderhede het betrekking op verwagte aankope van katoenpluksel deur RSA & Swaziland pluismeulens vanaf hierdie lande.



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# COTTON

## BAYER TO SELL SEED AND HERBICIDE BUSINESS TO BASF

Bayer has agreed to sell its seeds and herbicides business to BASF for approximately \$7 billion in cash. The sale is intended to secure regulatory approval of Bayer's planned \$66 billion purchase of Monsanto.

BASF, the world's third-largest maker of crop chemicals, has so far avoided seed assets and instead pursued research into plant characteristics such as drought tolerance, which it sells or licenses out to seed developers.

Bayer previously offered to sell assets worth around \$2.5 billion, but the European Commission said in August that the divestments offered by Bayer did not go far enough and Bayer had to sell the LibertyLink-branded seeds and Liberty herbicide businesses, because they compete with Monsanto's Roundup weedkiller and Roundup Ready seeds. The spread of Roundup-resistant weeds in North America has been a major driver behind Liberty sales.

The sale to BASF is conditional upon Bayer's acquisition of Monsanto going through which is expected to occur in early 2018.

## New Biodegradable Polyester Fibre

DuPont recently announced its latest innovation - Apexa® biodegradable polyester fibre. Apexa is a biodegradable polyester that decomposes through industrial composting without creating harm to the soil or environment. Developed through patented and innovative technology, DuPont Apexa fibre breaks down into simple CO<sub>2</sub> and H<sub>2</sub>O to reduce textile waste and limit environmental impact. It also blends with natural fibres such as wool, cotton or cellulose to enhance their attributes, making them stronger, softer and more durable.

## Monsanto, BASF Agree to New Restraints on Controversial Herbicide

Monsanto and BASF over the past year began marketing new versions of the dicamba weed killer to U.S. soybean and cotton farmers, who for years have struggled to kill weeds that have developed resistance to other commonly used herbicides, like Monsanto's Roundup. Monsanto developed new genetically engineered soybean and cotton seeds that were designed to resist dicamba, which would allow farmers to spray it onto these crops without damaging them.



But farmers and crop researchers say dicamba, historically prone to drifting onto neighbouring fields, has proved difficult to control. Scientists who study weeds estimate that dicamba over the summer damaged more than 3 million

acres of fields planted with soybeans that weren't engineered to resist the chemical.

The impact of the rules limiting sprayings of dicamba herbicides, announced by the U.S. Environmental Protection Agency (EPA), may affect Monsanto's biggest-ever biotech seed launch (soybeans engineered to resist the chemical). Under EPA's guidelines, only certified pesticide applicators, or people under their supervision, will be allowed to spray dicamba formulations manufactured by Monsanto and BASF next year. The EPA's new limits focus on the application issues and do not address volatilization, herbicide experts and farmers said.

Monsanto proposed the changes and won support for them from the agency, according to a company statement. Monsanto has blamed much of the damage on improper application of dicamba. Specialists, though, say the weed killer is risky because they can vaporize and drift across fields, a process called volatilization.





## OECD-FAO Landbou Vooruitskouing 2017-2026

Volgens die jongste jaarlikse OECD-FAO Landbou Vooruitskouingsverslag sal globale voedsel kommoditeitspryse volgens projeksie oor die volgende dekade laag bly in vergelyking met vorige pieke, aangesien die groei in vraag in 'n aantal ontluikende ekonomieë na verwagting sal verlangsamen en verder het biobrandstofbeleid ook 'n verminderde impak op markte.

Die wêreld se bevolking sal oor hierdie tydperk van 7.3 miljard tot 8.2 miljard toeneem en ontwikkelende lande sal vir byna

al hierdie groei verantwoordelik wees. In Sub-Sahara Afrika sal die bevolking van 974 miljoen tot 1.3 miljard toeneem, 'n toename van 289 miljoen in 10 jaar. Indië se bevolking sal oor hierdie tyd vanaf 1.3 miljard tot 1.5 miljard toeneem. Saamgesien sal Sub-Sahara Afrika en Indië verantwoordelik wees vir 56% van die totale bevolkingsgroei oor die volgende dekade terwyl Indië ook China sal verbystek as die wêreld se mees bevolkte land.

Gegewe hul sterk bevolkingsgroei, sal Indië en Sub-Sahara

Afrika in die volgende dekade saam met China, grootliks die dryfkrag wees in die wêreldwye vraag na kommoditeite. Vir graan sal die totale verbruik (insluitend nie-voedsel gebruik) na verwagting met 338 miljoen ton oor hierdie tydperk toeneem. Ongeveer 38% hiervan sal afkomstig wees van China, Indië en Sub-Sahara Afrika. Die aandeel is laer vir koring en mielies (waar ontwikkelde lande weer 'n groter rol speel), maar hoër vir rys (waar Indië alleen vir 27% van die toename in verbruik verantwoordelik sal wees).

## ICAC 76TH PLENARY MEETING

The International Cotton Advisory Committee (ICAC) met in Tashkent, Uzbekistan during 23-27 October 2017 for its 76th Plenary Meeting since the establishment of the Committee in 1939. The meeting was attended by 345 persons, including representatives from 16 Members, 4 international organizations and 9 non-members countries.

The theme of the meeting was "**Cotton in the Era of Globalization and Technological Progress**" and various topics were discussed amongst others:

- **Cotton subsidies:** It was reported that the estimated value of support by governments to their cotton sectors declined by 39% in 2016/17 to US\$4.5 billion.
- **Cotton Consumption:** Cotton's share in the world fibre consumption fell to 27%. Strategies which were discussed for increasing the demand for cotton

products included promoting the benefits of cotton as a natural, sustainable and renewable fibre.

- **Textile innovations and cotton:** Textile experts presented innovative uses of cotton that addressed consumers' demands for modern, functional textiles. New applications for cotton by blending with other fibres and also an assortment of other new textile materials have been developed.
- **Biotechnology:** It was agreed that the tools of genetic modification (GM) provide faster, more precise ways of imparting desirable traits into commercial crop varieties. Currently 80% of the world's cotton production is based on GM technology.
- **Technology Transfer:** The Plenary Meeting was informed about the close cooperation between Brazil and the C4 countries plus Togo in developing successful projects to encourage the

use of no till systems and integrated pest management control.

- The Committee decided to hold the 2018 Technical Seminar on the topic "**Combating Pest Resistance to Biotech Cotton and Pesticides**" following reports of bollworm resistance to Bt-cotton and insecticides; weed resistance to herbicides and whitefly resistance to insecticides.
- **Contamination:** The Plenary Meeting heard reports on the work in progress for removal and elimination of contamination in baled cotton.
- **The Private Sector Advisory Panel (PSAP)** recommended broadening the terms of reference of the Secretariat's on-going studies of the polyester market to include environmental issues related to microfibre pollution, lifecycle assessment of polyester and manufacturing processes.



# Skade wat aangerig is deur Vlekbesie (*Dysdercus nigrofasciatus*)

NAVORSING

Coleen Fourie - LNR Instituut vir Industriële Gewasse

Gedurende die 2016/17 katoengroeiseisoen is 'n plantdatumproef vir die 4de jaar by die LNR se Loskop Proefplaas in Groblersdal geplant. Vyf verskillende katoenkultivars is weekliks oor 'n periode van agt weke geplant om te bepaal watter kultivar geskik is vir 'n spesifieke plantdatum. Die vyf kultivars wat gebruik is was: Candia B2RF, Delta12BRF, DP1531B2RF, DP1541B2RF en Delta1240B2RF. Altesaam agt plantdatums is geplant vanaf 7 Oktober 2016 tot 25 November 2016.

**D**ie eerste plantdatumproef is in 2013/14 geplant en is daarna jaarliks herhaal maar elke seisoen bied egter sy eie uitdagings om katoen te produseer. Die 2016/17 katoen groeiseisoen is die eerste seisoen



wat grys en gevlekte katoenvesel opgelewer het. Die grys vesel is nie kultivar verband nie maar hoofsaaklik as gevolg van die insek *Dysdercus nigrofasciatus*.



Katoen vlekbesie is selde 'n problem in katoen omdat hulle deur breë spektrum insekdoders beheer kan word. Hulle kan ook nie in temperature hoër as 40°C oorleef nie en hulle benodig vrystaande water om in die katoenland teenwoordig te wees. Genoeg vog van reën en besproeiing vanaf Desember 2016 tot Februarie 2017 het egter die insek laat floreer. Lae toediening van breë spektrum insekdoder op oorsaankatoen aangrensend aan die Loskop



Proefplaas in kombinasie met laer dagtemperature het veroorsaak dat daar 'n baie hoë infestasië van vlekbesies voorgekom het.

Katoen vlekbesie val net bolle aan en sal nie plantgroeie benadeel nie, maar groeikragtigheid van

die plant kan wel beïnvloed word as die infestasië baie hoog is.

Volwassenes verkies die saad van katoen om op te voed. Pas uitgebroeide insekte voed nie maar benodig soos in al die ander stadiums, water wat hulle van dou en reën kry. Vanaf die tweede stadium voed die nimfe op die sade van bolle wat reeds gebars het maar nog nie ten volle oop is nie. Vierde en vyfde stadium nimfe se mondele is lank genoeg om soos volwassenes, op die sade in die bolle wat nog nie gebars het nie, te voed. Hulle kan ook op sade wat heeltemal uitgedroog het, voed mits vry water beskikbaar is. Hierdie voeding op die saad verminder die kiemkragtigheid van die saad en benadeel ook die kwaliteit van olie en katoensaadkoek. Die insekte het 'n onaangename reuk as hulle plat gedruk word en verkleur dan die vesels.

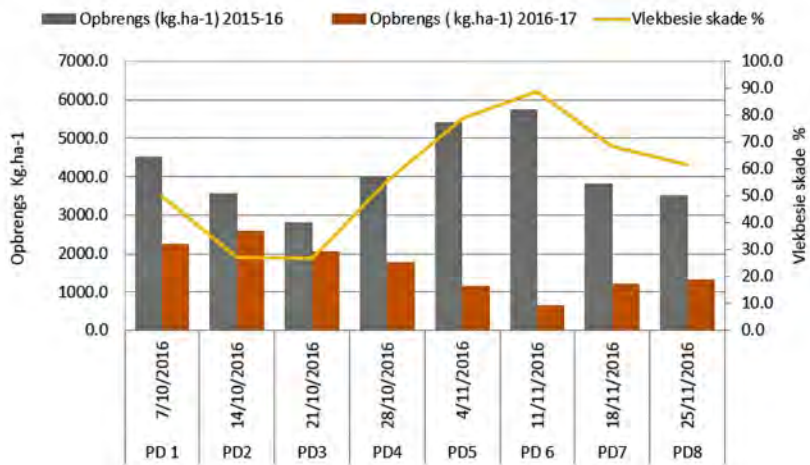
Die invloed wat vlekbesies op oorengs en veselkwaliteit het is soos volg:

- Jong bolle word meganies beskadig wat afspening kan veroorsaak;
- Groeikragtigheid van die plant word benadeel;
- Saad word beskadig deur die vlekbesies wat veroorsaak dat bolle lig weeg;
- Ge-afekteerde bolle sukkel om oop te maak en vesel is gevlek met geel ontlasting of liggaamsappe;
- Vlekbesies is draers van die interne bolsiekte *Nematospora gossypii* Nowell. Jong bolle wat met die siekte besmet word, word afgespeen. Bolle wat half ontwikkel is wanneer hulle geïnfekteer word, bly klein en lewer erg verkleurde en gekoekte vesel. Bolle wat driekwart ontwikkel is wanneer dit geïnfekteer word, kom normal voor en bars oop, maar die vesel is geel tot bruin verkleur. Bolle wat meer as driekwart ontwikkel is by infeksie, toon min nadelige gevolge.



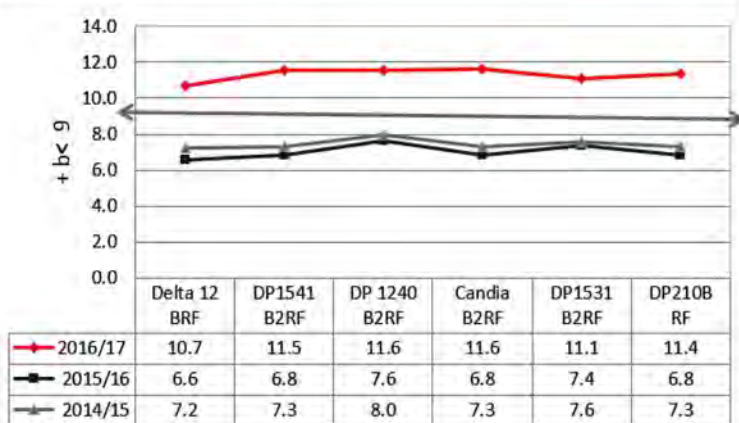
Al die veselkwaliteite was geaffekteer deur die vlekbesies op die plantdatumproewe. Vlekbesies is egter gedeeltelik te blameer vir die witheid (+b) en graad van refleksie (RD) van vesels. Nat weersomstandighede en lang blootstelling van katoenvesel aan hierdie omgewingsfaktore het ook bygedra tot die grysheid van die vesels.

**Grafiek 1: Opbengs (kg.ha)**



**Grafiek 1** dui die opbrengste aan op die plantdatumproewe wat grotendeels benadeel is deur vlekbesies en het bygedra tot hoë opbrengsverliese. Resultate toon aan dat omgewings-toestande baie gunstig was vir die vlekbesies om te floreer vanaf die 28/10/2016 aanplanting. 'n Opbrengsverlies van 55 % is verkry in die 28/10/2016 plantdatum aanplanting. Daarna het die opbrengsverlies verhoog totdat dit 88.7% bereik het vir die 11/11/2016 aanplanting, wat 'n aanduiding is dat vlekbesie op hulle aktiefste was gedurende hierdie periode toe bolle die meeste geskik was vir voeding.

**Grafiek 2: Witheid van vesels (+b < 9)**

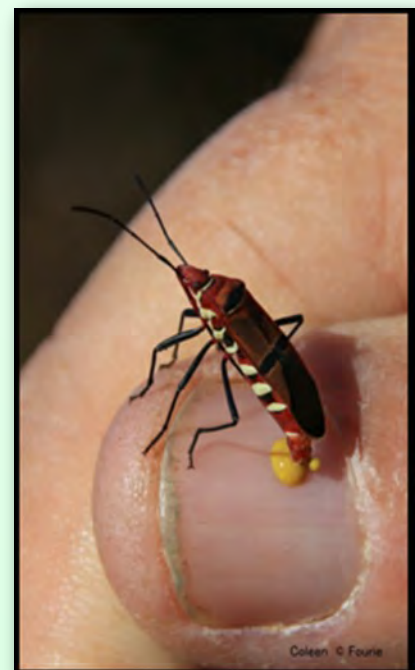
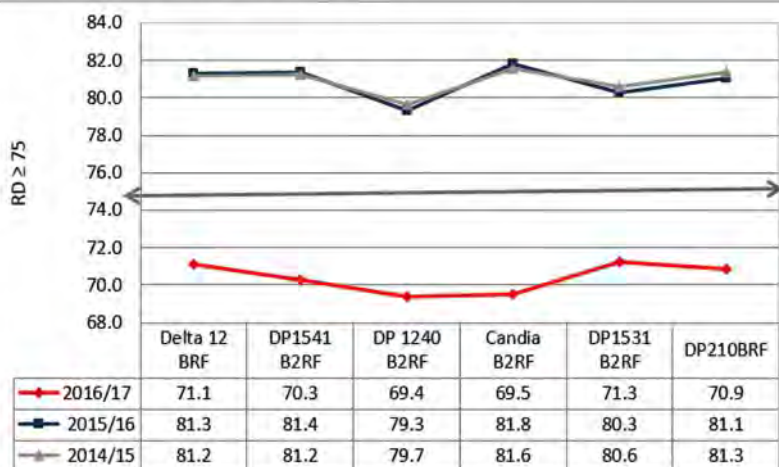


**Grafiek 2 en 3** dui aan:

die witheid (plus b) van al die kultivars wat aangeplant is oor die plantdatums en toon hoër waardes as die toegelate waarde van +b < 9; en

die graad van refleksie (RD) en al die kultivars toon laer waardes as die toegelate waarde van RD ≥ 75. Hoe laer die RD waarde is, hoe gryser vertoon die vesel.

**Grafiek 3: Graad van refleksie (RD ≥ 75)**



Laastens, die verminderde gebruik van insekdoders teen bolwurms en vergrote aanplantings van Bt-transgenetiese katoen kan lei tot 'n toename in die populasies van hierdie rooi goggas. Dus moet boere, voorligters en navorsers hierdie natuurlike vesel beskerm en nie toelaat dat hierdie pes 'n ekonomiese probleem word nie.

Bronne: LNR-Navorsingsinstituut vir Industriële Gewasse, Bestuursgids vir die Katoenproducent.



# THE EFFECT OF DIFFERENT NITROGEN LEVELS ON DOUBLE-SKIP ROW AND RIP-ON-THE-ROW COTTON PRODUCTION PRACTISES

RESEARCH



Research has shown that on the Makhathini Flats, the double-skip row, rip-on-the-row soil cultivation system is more profitable for dryland cotton production than the traditional plough, disc and plant soil cultivation system. The question arose as to what the influence on profitability will be if nitrogen is added as a topdressing.

## INTRODUCTION

The Makhathini Flats area of the Northern KwaZulu-Natal is very dry with an annual rainfall of 450 mm. The rainfall pattern is also very varied and erratic. Cotton is the only crop, which can be grown successfully under these conditions without irrigation assistance. Research was done to determine which cultivation practice will be suitable for dryland cotton smallholder farmers in this area. It was determined that the most profitable production method under these climatic conditions is the double skip row - rip on the row method. In this production method no ploughing or discing is done but only a shallow 25 to 30 cm deep ripping action on the plant row. Two rows are ripped

one meter apart and two rows skipped. This allows for roots to penetrate deep on the planting line as well as utilize moisture sideways in the open spaces. This method results in more moisture being available to the crop and results in higher yields. It also reduces the input cost drastically. Ploughing and discing are very costly practices. Planting double skip row also uses only half the quantity of seed used in planting inter row spacing of 1 meter resulting in a further reducing of Input costs. The fact that there is only half the usual amount of planted lines, also results in spraying only half the amount of pesticides. The question arose, that seeing that there is now more moisture available to the plants, will a nitrogen topdressing result

in a further economic benefit to the farmer and if so at what quantity must it be applied.

## METHODS

A research trial was conducted at the Makhathini Research Station for the past 3 cotton seasons to determine if nitrogen applied as a topdressing would have an economical benefit to the farmer. Six different nitrogen levels were applied, namely 0, 10, 20, 30, 40 and 50 kg N/ha. The cotton variety PM 3225 B2RF from Monsanto/Deltapine was used in all trials. The average rainfall measured for months November to June for the 3 seasons of 2014/15, 2015/16 and 2016/17 was 290 mm.

*H.J. Steyn, ARC Institute for Industrial Crops*

## CONCLUSION

The double-skip row / rip-on-the-row dryland cotton production method is a very effective method to produce cotton in areas where the rainfall during the cotton production season is low. From the combined seasons results, it shows that 20kg N/ha was the optimum level for producing cotton with this method. The combined seasons results shows the treatment of 20kg N/ha gave an average of 105kg seed cotton per hectare more than the 0kg N/ha treatment. At a price of R 6.00 per kg of seed cotton, it means the farmer gets an extra income of R 630.00 per hectare. The cost of 20kg of N in the form of LAN (28%) is R 392.00/ha and when deducted, results in a higher income of R 238.00 per hectare. Transport, handling and application costs must also still be deducted which could nullify the profit shown.



## RESULTS

**Table 1. Average values for yield, plant height and bolls/plant for 2014/15, 2015/16, 2016/17 seasons combined.**

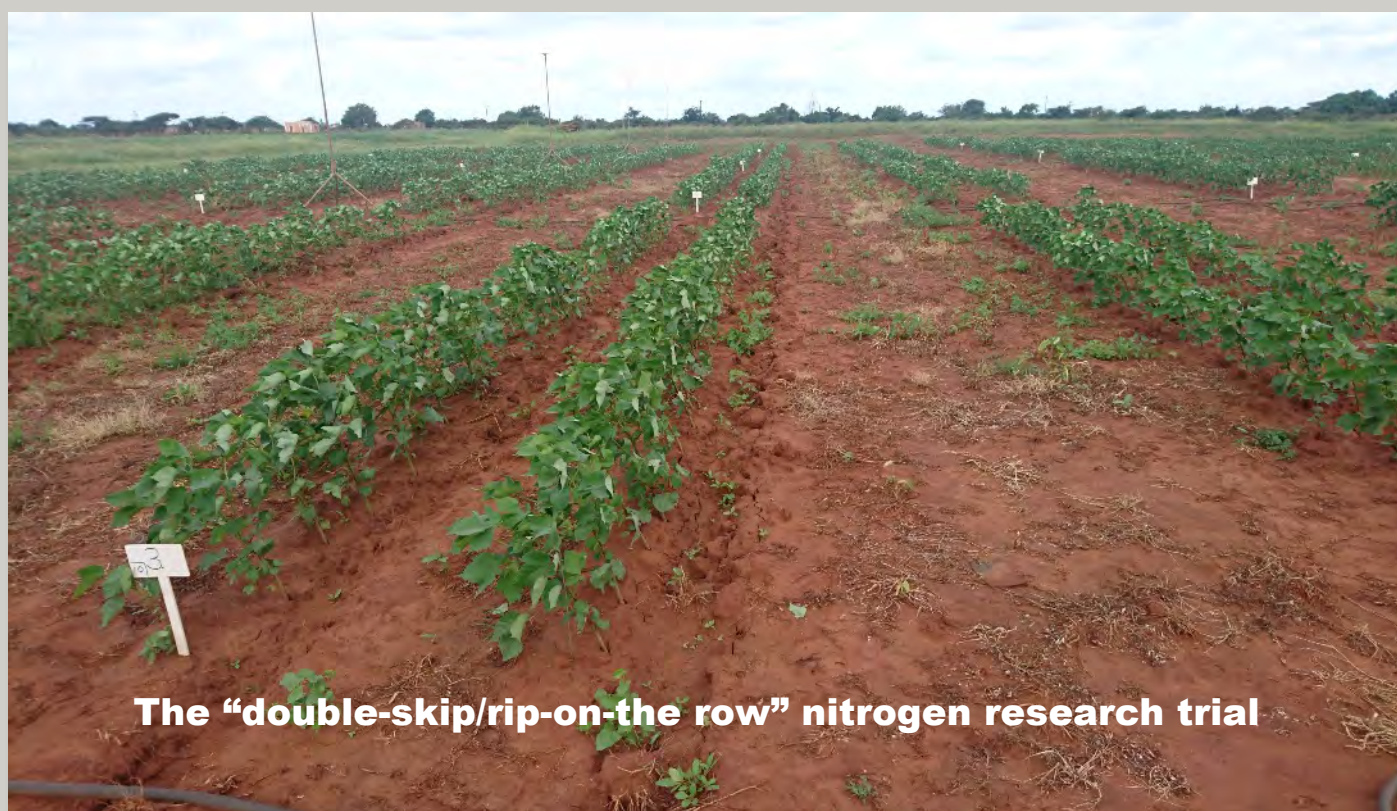
<u>Treatment</u>	<u>Yield (kg/ha)</u>	<u>Plant height (cm)</u>	<u>Bolls p. plant</u> <u>(7 plants)</u>
0	1279	71	14
10	1379	75	15
20	1384	74	13
30	1178	73	12
40	1294	76	15
50	1377	77	16
<b>Average</b>	<b>1315</b>	<b>74.1</b>	<b>14.3</b>

The highest yield/ha over the combined seasons was given by the 20kg N/ha treatment producing an average of 1 384kg of seed cotton per ha. The highest plant height of 77cm and the highest amount of bolls per plant was given by the 50kg N/ha treatment.

**Table 2. Average values for fibre qualities for 2014/15, 2015/16, 2016/17 seasons combined.**

<u>Treatment</u>	<u>Length (mm)</u>	<u>Strength (g/tex)</u>	<u>Micronaire</u>
0	28.0	33.0	4.4
10	27.9	33.2	4.4
20	27.8	33.4	4.3
30	28.0	32.6	4.2
40	28.3	33.1	4.3
50	28.1	32.9	4.4
<b>Average</b>	<b>28.0</b>	<b>33.0</b>	<b>4.3</b>

The longest fibre was produced by the 40kg N/ha treatment, the strongest fibre strength by the 20 kg N/ha treatment and the lowest micronaire value by the 30kg N/ha treatment.



**The “double-skip/rip-on-the row” nitrogen research trial**



# EVALUATION OF ENVIRONMENTAL FRIENDLY PRODUCTS FOR CONTROL OF NEMATODES ON COTTON

**Although few nematicides are available for the control of *Meloidogyne* spp. nematodes on cotton, Oxamyl still performed best compared to other environmental friendly products currently available.**

## EXPERIMENTAL DESIGN

A glasshouse experiment was conducted at the ARC-Industrial Crops Institute in Rustenburg and the following treatments were evaluated:

- i. Untreated control,
- ii. Standard Nematicide (Oxamyl) 10l/ha at planting.
- iii. Seed Treatment (Clothianidin) prepared by Bayer personnel.
- iv. OR\_079 (10% Pressed orange oil) + Standard nematicide (Oxamyl) 7 days before planting and standard nematicide at planting.
- v. OR\_079 100g/l applied 7 days before planting and at planting.
- vi. OR\_079 100g/l applied 7 days before planting and at planting + OR\_151 (plant derived flavonoids in an organic carbon complex) 250ml/ha of applied at 14 days after planting and 28 days later.

Mixed growth medium and sandy soil were sterilised to remove any pathogens. The soil was transferred to pots in glasshouse. Tomatoes roots infested with the root knot nematodes *Meloidogyne incognita* and *Meloidogyne javanica* were incorporated to the soil to establish nematode population. Soil samples were taken for analysis of nutrients. Planting date was 13 February 2017. During the trial, 20g/l cypermethrin was sprayed to control aphids.

The experiment comprised of a randomized block design with six

treatments, replicated 6 times in separate 3kg pots with three plants each. Candia B2RF cotton cultivar was used for study. Two plants were used for nematode assessments during season and one used for harvest end of season. Nematodes were extracted according to the procedure of Jenkins (1964) from one 250-ml sub-sample taken from the composite sample from each plot for identification and quantification of all plant parasitic nematodes (PPN) present. Then nematode samples (for soil and roots) counting were done before planting (soil only), 6 weeks after planting and 12 weeks after planting. To determine nematode root infestation, one randomly selected plant from the each pot was sampled at 6 and 12 weeks after planting.

## RESULTS

95% of the seedlings develop sufficient root/stem systems that ensured adequate number of test plants per pot. Moreover, sampling was destructive by uprooting the whole plant system to allow root and soil around root system to be assayed. The initial population of nematodes in soil showed no significant difference in each pot for each treatment. Although the untreated control had higher number of nematodes counted in the soil compared to other treatments, there was no significant difference in the number. At week six, *M. javanica* populations in the soil showed

The root-knot nematode (RKN), especially *Meloidogyne javanica*, is by far the most important nematode pest of cotton worldwide. Root-knot nematodes, in particular *Meloidogyne incognita* race 4, are the predominant nematode species that adversely affects the production of cotton in South Africa and thus result in substantial yield losses. Other nematodes, such as *Pratylenchus* spp. and *Trichodorus* spp. are widely found but not of economic importance in cotton. *Meloidogyne* spp. are widespread and attack a wide range of hosts, both cultivated and uncultivated. Following the 2005 international withdrawal of methyl bromide (MB) in management of plant-parasitic nematodes due to its eco-unfriendliness, *Meloidogyne* spp. increasingly became the most debilitating nematode genus, which left producers with limited options. There are no commercial cotton varieties resistant to root-knot nematodes available in South Africa. It is therefore imperative to evaluate the effectiveness of nematicides and biological agents for the management of nematodes in a cotton farming system.

significant difference among treatments. Untreated control had significantly higher number of nematodes in soil compared to standard nematicide and seed treatment. In addition, standard nematode and seed treatment had no significant difference with other treatments except for untreated control. At week 12, nematode counts in

*continued on next page*





**Tydens 'n onlangse vergadering van die SA Pluismeulenaarsvereniging is Louis Olivier as Voorsitter verkies in die plek van Joseph Kempen wat uitgetree het.**

Louis wat in Krugersdorp gebore is, het in Vaalharts grootgeword en in 1987 sy B.Agric. graad aan die UOVS behaal. Sedert 1989 boer hy op Vaalharts op 400ha besproeiing met katoen, gars, lusern, pekanneute, ens. In die negentigjare het hy op die Tegniese Komitees van die Koringraad sowel as die Oliesaderaad gedien. Hy was vanaf 1989 - 1995 'n landboukundige vir die Vaalharts Koöp.; 'n produkte-bestuurder vir Senwes vanaf 1995 - 1999; bemarking en landboukundige dienste gelewer vir Omnia Kunsmis vir Vaalharts vanaf 2000 - 2011 waarna hy aangestel is as Besturende Direkteur van Vaalharts Katoen.

Hy is getroud met Marinda en het twee seuns Luther en GP asook twee kleinkinders. Vir ontspanning speel hy golf en ry motorfiets.

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### *Nematode Control - continued from previous page*

the soil for *M. javanica* showed significant difference amongst treatments. OR\_79 had highly significant number compared to standard nematicide, OR\_79 + standard nematicide and seed treatment, which were not different to other treatments.

Initial population for *M. incognita* showed no significant difference among counts in each pot for each treatment. At week six, treatments showed no statistically difference in the number of nematode counts in the soil. With OR\_79 number of nematodes present in the soil increased compared to untreated control. Twelve weeks after planting soil samples were taken again for *M. incognita* counts. The untreated control had the highest number compared to OR\_79 + OR\_151 statistically but no significant difference compared to the four other treatments.

At six weeks, *M. javanica* counts in roots showed significant difference amongst treatments. OR\_79 had the highest counts statistically compared to standard nematicide that had the lowest number. In addition, OR\_79 + OR\_151 and OR\_79 + standard nematicide had no significant difference compared to standard nematicide. At 12 weeks, OR\_79 also had highest number, which is significantly different to standard nematicide that had the lowest number of *M. javanica* in roots. However, the untreated control had no significant difference with other treatments including standard nematicide except with OR\_79, which was significantly different.

Meloidogyne *incognita* root analysis also took place at week 6 (Table 2: B). Only the untreated control was significantly different from all other treatments. At 12 weeks after planting, OR\_79 and the

untreated control had the highest number of nematodes compared to standard nematicide statistical.

*SC Khuzwayo - Agricultural Research Council - Industrial Crops*





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## How to Care for Cotton

**C**otton is the most widely used natural fabric in the world. It is used in clothes and home textiles, from baby clothes to denim jeans and table and bed linens. But what is the best way to look after it?

It is difficult to give guidance on washing cotton as there are so many types of cotton fabrics available and so many uses for it. Cotton is such an important textile in summer. It's light, breathable and it is often described as easy to look after. While this is generally the case, you will want to take steps to make sure you care for your cotton items.

Cotton T-shirts can be prone to shrinking when they are washed and dried. To try and stop this happening, wash in cold water. Give garments a gentle stretch when they come out of the wash.

The best way to prevent your garments from losing colour is to hand wash in cold water. Use a colour safe stain remover to pre-treat your cotton garments. Focus on the areas exposed to sweat and antiperspirant as well as on stain spots.

Avoid drying your clothes on a wash line as hanging can inevitably stretch the fabric. Over drying not only causes some cotton clothes to

shrink, it causes excessive wrinkling. Most cotton fabrics need very little ironing if the clothes are removed from the dryer while slightly damp. Hang clothes to finish drying to prevent excessive wrinkling.

If you want dark cotton clothes like trousers and blazers to keep from fading, dry cleaning is a good option. A professional cleaner will know how to handle the fabric properly.

Some cotton fabrics wrinkle excessively when washed and will require ironing. Use a medium hot iron and always iron on the wrong side of the fabric/garment. For extra protection use a pressing cloth between the iron and the fabric.

There are exceptions to the "cooler temperature" rule, for example in the case of bed, bath and kitchen linen. Read all the labels to be sure you don't have any specific cleaning requirements to follow. Wash with the hottest water temperature setting listed on the care label. Hot water kills most germs and take care of dust mites that thrive in bedding.

Cotton creases very easily and because of this it is best if you store your cotton garments by hanging it rather than folding it.

Do not let your clothes be eaten by moths and silverfish. Declutter your wardrobe and vacuum every corner of your wardrobe. In order to ensure that your favourite clothes are safe, do not leave your dirty clothes lying around for too long.

Cotton is a fairly tough fabric and cotton items can keep for long if it is cared for properly.

*Helena Claassens - Cotton SA*





# Outlook on Textiles & Clothing

## Economic Environment

The economic environment in South Africa in the recent past and in 2017 has been characterised by very weak domestic demand for consumer products in general and for textiles and clothing in particular. This is a reflection of a battered consumer struggling to make ends meet and an economy grappling with no to low growth, limited investments and with persistently high unemployment levels. Consumer prices as measured by the CPI have increased at around 5% in 2017 while textile production prices have increased by 4%. Last year administered prices such as fuel prices and electricity prices tended to moderate their upward trend, in line with the stabilising of the international oil price and a less volatile domestic currency. The current request by ESKOM for a 20% hike in the price of electricity and the deteriorating value of the Rand will certainly set the economy and the textile industry back on its heels.

## Uncertainty

During the last quarter of 2016, as with events of December 2015 when the country went through three finance ministers in the space of four days, the country was faced with the spectacle of the incumbent finance minister being hauled before the courts on charges of corruption and fraud. The initial negative effect of this action on the value of the currency however was reversed when the charges were dropped and the case was withdrawn. Throughout all this political intrigue last year, the volumes of textile imports reacted to reflect the weak domestic demand with fabric imports decreasing by 8% and household textile imports decreasing by 6% in 2016. Levels of imports have however since recovered and have shown some increases in 2017. Nevertheless uncertainty remains high and persistent.

## Levels of Output and Employment

Growth in output for the total manufacturing sector in South Africa has been very modest, growing on average by marginally above 0.5% per year over the past five years. For the textile industry average growth in output over the past five years has been slightly above 0.6% per year. Total manufacturing capacity utilisation for 2016 was 82% while the capacity utilisation for the textile industry was 68%. The reason for these low capacity utilisations is the continuing depressed consumer demand. Unfortunately employment in the textile industry in 2017 stood at 31 766 down by 1.4% on the year before, while that for knitting mills was down by 5.1%.

## Under-valued Imports

The under-valuation of imports has become the biggest problem facing many industries in South Africa and in particular the textile and clothing industries. The practice of the under-valuation of imports of textiles and clothing into the Southern African Customs Union saw its genesis soon after the scrapping of

specific duties on these goods at the end of 2002. The scrapping of specific duties was in line with South Africa's Uruguay Round commitments under the GATT. This event had however been brought forward by five years through an overly ambitious self-imposed accelerated tariff phase down period which was contracted from 12 years to 7 years.

A study conducted back in 2008 determined that the degree of under-valuation of textile and clothing imports from China in 2007 into South Africa was 47% for fibre, 13% for yarn, 29% for fabric, 51% for clothing and 35% for made up textile imports. The study showed that in total textiles and clothing imported from China in 2007 were under-valued by 45%. The findings were confirmed by the DTI which in turn lead to a series of interventions at NEDLAC on customs fraud and an anti-under-valuation drive by SARS.

As a consequence a system of reference prices was introduced by SARS in November 2011 on selected textile and clothing items to act as triggers to alert SARS to under-valued import clearances. Experience has shown that initially some progress was made in combatting and reducing the extent of the under-valuation of imports of textiles and clothing. This is outlined in the table below which is based on monthly clearance data supplied by SARS.

However after initially recording some encouraging reductions in the extent of the under-valuation on the imports of textiles, in some cases progress has been halted and the situation has regressed. Whatever the reason there are just too many clearances of fabrics and made up textiles at grossly and obviously under-valued import prices.

## Future Prospects

While the start to 2017 heralded better economic prospects than for 2016, with improved climatic conditions for agricultural production and improved global factors, uncertainty in the domestic economy remains high. Domestic political developments have begun to seriously hurt the economy with the incumbent finance minister being fired at the end of March 2017. Also revelations brought about by the "Gupta leaks" and

reports of state capture are tending to undo any positive developments that there may have been. In addition there is a lack of policy direction. The consequence of all of this has been the downgrading of South Africa's credit rating to junk status by Fitch's, Standard and Poor and Moody's. Prospects for the textile industry are therefore not immediately encouraging with no early signs of this improving.

Import Under-valuation on Selected Textiles				
Vol % Below Reference Price				
Description	Jun-14	Jun-15	Jun-16	Jun-17
Polyester Fibre	74%	0%	0%	3%
Cotton Yarns	1%	0%	4%	0%
Sewing Thread	86%	94%	87%	94%
Cotton Woven Fabrics	42%	36%	27%	25%
Filament Woven Fabrics	81%	48%	50%	19%
Mmf Woven Fabrics	35%	57%	51%	68%
Chenille Fabrics	48%	39%	10%	5%
Knitted Fabrics	69%	38%	28%	32%
Woven Blankets	84%	45%	76%	67%
Knitted Blankets	66%	91%	100%	100%
Other Blankets	86%	87%	44%	64%

Brian Brink - Textile Federation of South Africa  
(Sources: Statistics SA and SA Revenue Services)



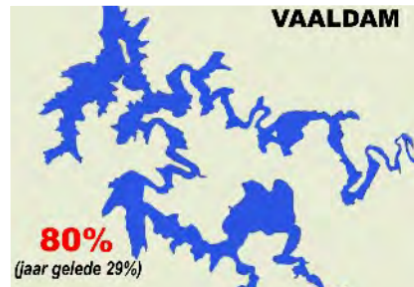
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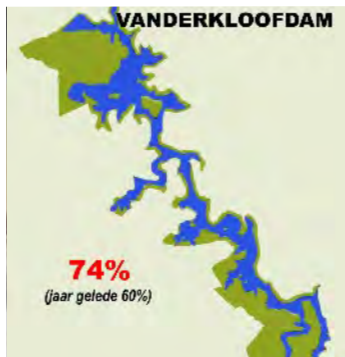
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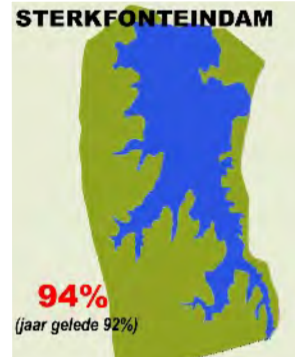
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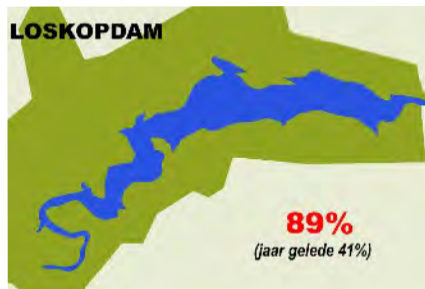
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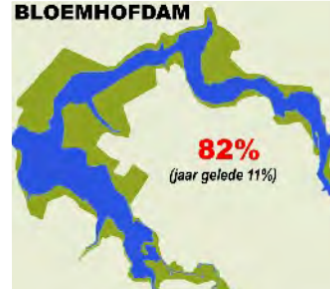
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## KLIMAATSVORUITSIGTE: November 2017 tot Maart 2018

Die El Niño Suidelike Oosilasie (ENSO) gaan voort om te ontwikkel tot 'n La Niña toestand en daar sal na verwagting ten minste 'n swak La Niña toestand dwarsdeur die somertydperk heers. Die vroeë en middel somer voorspellings dui op 'n tipiese La Niña toestand met bo-normale reënval wat gedurende Nov-Des-Jan asook gedurende Des-Jan-Feb oor die somerreënvalgebiede verwag kan word.

Al is die voorspelling van vloede wat betref intensiteit en tye nie nou moontlik nie, gaan bo-normale reënvalseisoene gewoonlik gepaard met vloede en word

aanbeveel dat vroeë waarskuwingstelsels van die Suid-Afrikaanse Weerdiens gedurende die somerseisoen gevolg word.

Laer temperature as die gemiddeld word ook in die somer oor die somerreënvalgebiede verwag. Dit is te danke aan die hoër as normale aantal reënvaldae wat in die somerreënvalgebiede verwag word. Hoër as gemiddelde temperature word in die suidwestelike dele van die land verwag.

SA WEERDIENS: 26 OKTOBER 2017



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