

Katoen uit die boonste rakke!

DELTAPINE

Met die nuwe Deltapine® katoenvariëteite van Monsanto kan jy top opbrengste behaal met toonaangewende pluispersentasies en puik veselkwaliteit!

Deltapine[®] bied jou hoëkwaliteit variëteite, naamlik:

- DP 1531 B2RF (Nuut!) **BGII x RR-Flex stapelgeen** Medium seisoenlengte Uitstekende opbrengspotensiaal Uitstekende veselkwaliteit Baie hoë pluispersentasie Besproeiing sowel as droëland
- Delta 18 RF RR-Flex vir toevlugsarea Medium-lang seisoenlengte Goeie opbrengspotensiaal Uitstekende veselkwaliteit Besproeiing sowel as droëland

Trek voordeel uit jou oes met Monsanto.

- **DP 1541 B2RF (Nuut!) BGII x RR-Flex stapelgeen** Medium-lang seisoenlengte Uitstekende opbrengspotensiaal Uitstekende veselkwaliteit Baie hoë pluispersentasie Besproeiing sowel as droëland
- PM 3225 B2RF BGII x RR-Flex stapelgeen Lang seisoenlengte Uitstekende opbrengspotensiaal Goeie veselkwaliteit Droëland en opkomende boere
 - **DP 1240 B2RF** BGII x RR-Flex stapelgeen Medium-lang seisoenlengte Uitstekende opbrengspotensiaal Uitstekende veselkwaliteit Besproeiing sowel as droëland







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. Kliënte is welkom om ons kliëntedienslyn te skakel by 011 790-8200 of stuur 'n e-pos aan: customercare.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, op Facebook® by www.facebook.com/MonsantoCo, of teken in op ons NewsRelease RSS Feed. MONSANTO Monsanto en Deltapine® is geregistreerde handelsmerke van Monsanto Technology LLC. Monsanto Suid-Afrika (Edms) Bpk, Posbus 69933, Bryanston, 2021.





INHOUD CONTENTS

Voorwoord / Preface Pg 3 Om te ontblaar of nie? Pa 4 **Katoen SA Markverslag** Pg 6 A return to grant-based incentives Pg 7 Nkomazi small-holder cotton farmer project Pq 8 **Cotton News** Pg 10 **Robotics in agriculture** Pg 12 **Smart clothes** Pg 14 **Outlook on textiles & clothing** Pg 15 The fall armyworm in SA Pg 16 **Cotton Cluster report** Pg 17

VOORBLAD: Springbokvlakte droëlandkatoen

> Editor: Koot Louw kootlouw@cottonsa.org.za Tel: 012 804 1462 Editorial Committee: Hennie Bruwer, Koot Louw, Hein Schroder, Robbie Kemp

CEO: Hennie Bruwer Tel: 012 804 1462 Fax: 012 804 8616 Website: www.cottonsa.org.za PO Box 912232, Silverton 0127 PRETORIA SOUTH AFRICA

Editorial comment in this magazine is published under the auspices of the CEO and management of Cotton SA and opinions are that of the authors. Copyright is reserved on all content.

VOORWOORD / PREFACE

eelwat gesprekvoering is tans aan die gang tussen die regering en georganiseerde landbou wat betref die vermindering van kweekhuisgasse deur die sektor en doelwitte wat behaal moet word ingevolge ons internasionale verpligtinge in die verband.

Ofskoon landbou se koolstofvoetspoor relatief klein is in vergelyking met ander sektore, is daar tog geleentheid vir verdere verbetering daarvan deur die verhoging in effektiewe produksie en toepassing van volhoubare landboubewaringpraktyke. Landbou is uniek in vergelyking met ander sektore deurdat dit koolstofvrystellings kan verwyder met plantproduksie sowel as kan verminder deur beter grondbestuurspraktyke.

Hoe vaar katoenverbouing met sy verpligting om 'n skoner en gesonder omgewing te bevorder? Die verbouing van een hektaar katoen deur die toepassing van minimum bewerkingspraktyke verwyder jaarliks 3.6 ton koolstofdioksied uit die atmosfeer. Of anders gestel, die hoeveelheid koolstofdioksied wat jaarliks deur wêreldwye katoenverbouing geabsorbeer word is gelykstaande aan die verwydering van 7 miljoen motors se uitlaatgasse! Katoenverbouing het 'n beter as neutrale koolstofvoetspoor deurdat die plant meer koolstof in die vesel en saad berg as wat vrygestel word deur die brandstof- en kunsmisverbruik tydens die bewerkings- en groeifases van die oes.

Plaaslik het die Clusterprogram die einde van jaar 3 bereik. Dit is 'n 5-jaar program en die impak hiervan kan alreeds oor die hele waardeketting waargeneem word. Die verwerking en beskikbaarstelling van bruikbare bedryfsinligting wat die inisiatief onder andere tot gevolg gehad het, kan nou met groot vrug op alle sub-sektore tot voordeel en groei van die bedryf aangewend word. Gelyklopend hiermee het die ge-integreerde besigheidsmodel ook tot gevolg dat meer plaaslike katoen plaaslik verder verwerk word. Die model het ten doel om katoen- en tekstielinvoere sistematies met ten volle plaaslike ge-integreerde waardekettings te vervang. Die verwagting is dat hierdie tendens eksponensieël in die toekoms gaan toeneem wat groot voordele vir die katoenwaardeketting, van produsent tot klerevervaardiger, die kleinhandelaar en die landsekonomie in sy geheel, sal inhou!

Die vraag is egter, kan ons katoenproduksie weer op aanvaarbare vlakke kry om aan die groeiende plaaslike vraag te kan voorsien en indien wel, tot watter mate kan ons produksie weer verhoog alvorens daar op invoere teruggeval moet word?

A good deal of discussion is currently taking place between government and organised agriculture as far as the reduction of greenhouse gases by the sector and targets to be reached are concerned, taking into account our international obligations in this regard.



Although agriculture's carbon footprint is relatively small compared to other sectors, there remains room for improvement by making more use of effective production and sustainable agriculture conservation practises. Agriculture is unique compared to other sectors in that it can remove carbon emissions by way of plant production as well as reduction by using more effective land management practises.

How successful is the cotton production sector with its commitment to bring about a cleaner and healthier environment? Growing a hectare of reduced-tillage cotton removes 3.6 tons of carbon dioxide from the atmosphere every year. This means that the amount of carbon dioxide removed by cotton plants worldwide is equivalent to taking 7 million cars off the highways! Cotton has a better than neutral carbon footprint because the plant stores more carbon in lint and seed than is released from fuel and fertiliser used during growth.

Locally, the Cluster Program has reached the end of year 3. This is a 5-year program and its impact can already be seen across the whole value chain. The processing and dissemination of useful industry information which the initiative has brought about amongst others, can now be used to good effect in all sub-sectors adding to growth in the industry. The integrated business model has at the same time brought about an increase in the further processing of local cotton. The aim of the model is to systematically replace cotton and textile imports with fully integrated local value chains. The expectation is that this trend will grow exponentially in future bringing great benefit to the cotton value chain, from producer to clothing manufacturer and retailer as well as to the entire economy.

The question remains however, if we can bring cotton production up to acceptable levels again in order to satisfy local demand and if so, to what extent will we be able to increase production before having to rely on imports again?





Hierdie vraag kom by baie boere op net voor pluktyd veral as die koste per hektaar in ag geneem word.

Met al die reën die jaar en matige temperature, kom dit voor of die katoenaanplantings selfs op droëland geweldige biomassa produseer. In die meeste gevalle word groeireguleerders toegedien om die groei te beperk, maar dit het gewoonlik nie 'n groot impak op biomassaproduksie nie.

Dit kom voor of daar 'n direkte verband is tussen die hoeveelheid biomassa wat geproduseer word wat dan as vreemde materiaal opeindig in die pluismeule en 'n invloed op die graderingsresultate het. As die graderingstatistiek van 2014/15 met 2015/16 vergelyk word, dan merk ons dat daar 'n drastiese graadverskuiwing plaasgevind het. In die grafieke kan duidelik gesien word hoe die gradering (voorkoms van die katoenvesel) tussen die twee seisoene verswak het. Het die keuse van kultivars verander? Nee, die aanplantings was 95% dieselfde variëteite gedurende die twee seisoene.

Na my mening kan die verswakking toegeskryf word aan produksiepraktyke van ontblaring wat in sommige gevalle verkeerdelik of glad nie gevolg word nie. Faktore wat 'n groot impak het op die toedieningsmetodes van ontblaringsmiddels is watervolume, druppelgrootte(verspreiding), watergehalte en penetrasievermoë. Boere moet dus seker maak dat die persoon wat die toediening doen wel die etiket van die produk volg en verstaan. Elke produk het sy eie vereistes as dit kom by gewasstadium, temperature of tyd van toediening.

Daar moet in gedagte gehou word dat soveel as moontlik van die vreemde materiaal voor die pluisproses verwyder moet word. Dit beteken dat die plante droog moet wees en die minimum blare (vreemde materiaal) moet hê asook dat die plukker optimaal





gestel moet wees om so skoon as moontlik te kan pluk. Die hoeveelheid vreemde materiaal sal ook die plukspoed beïnvloed, en gegewe die aangeplante hektare, die verwagte oes en die beperkte aantal plukkers, kan daar nie hierdie jaar misgetas word nie. In gevalle waar geen ontblaring plaasvind nie of ontblaringspraktyke nie effektief toegepas word nie, kan dit onnodige druk op die pluismeule plaas om te verseker dat die bes moontlike grade na pluis realiseer. Produsente besef baie keer nie dat daar 'n prys daarvoor betaal word, bv. dit lei tot lengteverlies en verhoog die persentasie kortwat veselinhoud aansienlike finansiële verliese tot gevolg kan hê.

Veronderstel dat as gevolg van swakker ontblaring word die gelewerde katoen van 'n "Good Middling" afgradeer na 'n "Middling", dan sal 'n boer die volgende inkomste per hektaar verloor:

- Katoenpluksel teen 'n opbrengs van 5 ton per hektaar en 'n pluispersentasie van 37% word 1.85 ton vesel per hektaar gelewer.
- Veronderstel die vesel realiseer nie die verwagte graad en klas nie maar presteer swakker, kan die verlies per hektaar soos volg daar uitsien:
 - 1.85 ton "Good Middling" klas
 AO vesel teen R 23-84/kg =
 R 44 104 per hektaar
 - 1.85 ton "Middling" klas AO vesel teen R 22-68/kg = R 41 958 per hektaar
 - Dit beteken die boer het R 2146 per hektaar verloor! Vergelyk dit met die koste van ontblaring?

Maak die som, dink mooi.

Alle sukses en voorspoed met die boerdery!



Ginstar[®] is 'n ontblaringsmiddel wat ook die hergroei van katoenplante onderdruk. Dit is geformuleer as 'n suspensie konsentraat en vergemaklik die oes van katoen.

AKTIEWE BESTANDDELE

Thidiazuron en Diuron

DIE FORMULASIE IS ONTWIKKEL OM

- Fisiese stabiliteit te verbeter; en
- Hantering en vermenging te vergemaklik

METODE VAN WERKING

Thidiazuron is 'n unieke bestanddeel met spesifieke plantgroei-regulerende effekte. Dit beïnvloed die wisselwerking tussen drie van die sleutel planthormone, naamlik etileen, ouksiene en sitokiniene.

Thidiazuron word geabsorbeer deur die blare en bevorder die vorming van die natuurlike afsnoerlaag tussen die stam en blaarsteel van die plant.

Thidiazuron is die effektiefste hergroei-inhibeerder wat in katoen gebruik word.

VOORDELE VAN GINSTAR®

- · Geen hande-arbeid tydens oes
- Beperk hergroei
- Geen degradering
- Verkort groeiseisoen

POSISIONERING IN 'N SPUITPROGRAM

Ginstar[®] is die laaste bespuiting van die seisoen. Dien **Ginstar**[®] toe wanneer 60% van die bolle oop is en wanneer die jongste bolle fisiologiese volwassenheid bereik het.



^{*} VSA November 2002

	TOEDIENIN	DEDIENINGSTABEL			
	Gewas	Dosis	Opmerkings		
2	KATOEN	150 - 250 ml Ginstar® 540 SC plus 2 ℓ smalbestek minerale olie / ha	Dien toe d.m.v. grond- of lugtoediening. Dien toe sodra 60 % bolle gebars het of sodra die jongste oesbare bol, fisiologies volgroeid is.		

* Raadpleeg die etiket vir meer volledige inligting

Ginstar® Reg. Nr. L7786 (Wet Nr. 36 van 1947). Ginstar® bevat Thidiazuron en Diuron (Versigtig). Ginstar® is ,n geregistreerde handelsmerk van Bayer AG, Duitsland. Gebruik slegs volgens etiketaanwysings.

Bayer (Edms) Bpk. Reg. Nr. 1968/011192/07 Wrenchweg 27, Isando, 1601. Posbus 143, Isando, 1600. Tel: +27 11 921 5002

www.cropscience.bayer.co.za www.bayer.co.za



Science For A Better Life

MAR. 1016

KATOEN SA MARKVERSLAG SOOS OP 1 MAART 2017

Die ICAC verwag dat die toename in wêreld katoenvoorrade buite China afwaartse druk op wêreldpryse teen die middel van hierdie jaar kan plaas.

die olgens International Cotton Advisory Committee (ICAC) sal die Chinese regering na verwagting hierdie maand begin met verkope uit sy katoen reserwevoorrade. Met die aanname dat 'n soortgelyke hoeveelheid hierdie jaar as verlede jaar verkoop sal word, sal Chinese katoenvoorrade in 2016/17 met 17% tot 9.3 miljoen ton afneem, wat 53% van wêreld eindvoorrade sal verteenwoordig. Die ICAC verwag egter dat wêreld eindvoorrade buite China met 7% tot 8 miljoen ton in 2016/17 sal groei, wat afwaartse druk op wêreldpryse teen die middel van hierdie jaar kan plaas.

Die ICAC raam dat wêreld katoenproduksie in 2017/18 met 2% sal toeneem hoofsaaklik as gevolg van 'n verwagte toename in aangeplante hektare. Katoenproduksie in Indië, die wêreld se grootste katoenprodusent, sal na verwagting met 2% tot 5.9 miljoen toeneem. China ton se katoenproduksie kan ook met 2% toeneem tot 4.8 miljoen ton, wat die eerste toename in 6 jaar sal wees. Volgens die ICAC sal dit egter grootliks afhang of daar weer 'n subsidie gaan wees. Ten spyte van 'n verwagte 9% toename in katoenaanplantings in die VSA hierdie jaar, vanweë meer aantrekliker katoenpryse in vergelyking met kompeterende gewasse, sal produksie na skatting met net 1% tot 3.7 miljoen ton toeneem weens die hoër % hektare wat afgeskryf sal word, geraam op 12%.

Die ICAC verwag dat wêreld katoenverbruik in beide 2016/17 2017/18 stabiel in die en omgewing van 24 miljoen ton sal bly. China is vir lank reeds die wêreld se grootste verbruiker van katoen maar sy verbruik van katoen en aandeel in die wêreldtotaal het voortdurend vanaf 2010/11 tot 2015/16 afgeneem toe dit 7.4 miljoen ton bereik het. Alhoewel die ICAC raam dat China se katoenverbruik met 2% in 2016/17 en met 1% in 2017/18 sal groei, sal sy aandeel in wêreldverbruik op ongeveer 30% bly weens die toename in katoenverbruik in ander lande soos Bangladesh en Vietnam katoenverbruik waar na verwagting onderskeidelik met 6% en 7% in 2017/18 sal groei.

Die ICAC raam dat wêreld katoenhandel met 3% tot 8 miljoen ton in 2017/18 sal groei met Bangladesh en Vietnam wat die wêreld se grootste twee katoeninvoerders in 2017/18 sal bly en saam vir 'n derde van wêreld katoeninvoere verantwoordelik sal wees. Die VSA sal ook die wêreld se grootste katoenuitvoerland in 2017/18 bly met katoenuitvoere wat na raming met 5% tot 2.9 miljoen ton sal toeneem en verantwoordelik sal vir 36% wees van alle katoenuitvoere. Katoenuitvoere deur Indië, die wêreld se tweede grootste uitvoerder sal na raming met 3% toeneem in 2017/18 tot 990 000 ton.

Koot Louw - Katoen SA

(miljoen metrieke ton)	2015/16	2016/17	2017/18
Beginvoorraad	22.3	19.2	17.9
Produksie	21.0	22.7	23.1
Verbruik	24.1	24.1	24.3
Uitvoere	7.5	7.9	8.1
Invoere	7.5	7.9	8.1
Eindvoorraad	19.2	17.9	16.7
Eindvoorraad/verbruik (China uitgesluit)	48%	52%	55%
A Indeks (VSA c/lb)	70	70-83	





Wat die plaaslike vooruitskouing betref, dui die 2e skatting vir die 2016/17 produksiejaar op 'n totale katoenoes van 75 040 bale vesel, 'n styging van 48% teenoor die vorige seisoen. RSA droëlandhektare toon 'n toename van 320% hoofsaaklik weens die beskikbaarheid van katoen "stripper" oesmasjien tegnologie wat met sukses onder die Katoen Cluster gedemonstreer is. Na skatting sal 73 040 bale geproduseer word van RSA geproduseerde katoenpluksel, 'n styging van 45% teenoor die vorige seisoen. Die balans van 2000 bale vesel het betrekking op verwagte Swaziland geproduseerde katoen wat deur die Swaziland pluismeule gepluis sal word.



KATOEN OESVERSLAG - 2e SKATTING

2016/17 PRODUKSIE JAAR

28/02/2017

			OPBRENGS	OPBRENGS		%	%
			BESPROEIING	DROËLAND	PRODUKSIE	VAN OES	VAN OES
PRODUKSIE	HEKTARE	HEKTARE	kg katoen	kg katoen	200 kg bale	HANDGE-	SOVER
STREEK	BESPROEIING	DROËLAND	pluksel/ha	pluksel/ha	katoenvesel	PLUK	GEPLUIS
LIMPOPO PROV.							
Loskop	2406	0	4200	0	18189	0%	0%
Noord & Suidvlakte	128	5105	4000	1000	10111	0%	0%
Dwaalboom/Thabazimbi	0	0	0	0	0	0%	0%
Limpopo Ander	467	45	4200	1000	3612	0%	0%
Weipe	1078	0	4500	0	8974	0%	0%
NOORD-KAAP							
Vaalharts	1319	0	4739	0	11564	0%	0%
Benede Oranjerivier	391	0	4500	0	3255	0%	0%
Res van Noord-Kaap	270	0	5000	0	2498	0%	0%
NOORDWES							
Stella/Delareyville/Setlagoli	522	1207	5000	1145	7385	10%	0%
Taung	0	0	0	0	0	0%	0%
KWAZULU-NATAL	380	1500	4211	600	4545	63%	0%
MPUMALANGA	0	2692	0	600	2907	100%	0%
OOS-KAAP	0	0	0	0	0	0%	0%
RSA TOTAL	6961	10549	4453	858	73040	9%	0%
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		
GROOTTOTAAL	6961	12549	4453	817	75040	11%	0%

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

"Our past production policy was naïve" so says Mr L October, Dept. of Trade and Industry director-general.

THE DTI RESPONDS TO A WORLD BANK REPORT BY BACKING A RETURN TO GRANT-BASED INCENTIVES

SA was stupid and naïve to have sector in the 1990's in line with international policy guidelines, because the country paid a price and had to play catch-up, Department of Trade and Industry directorgeneral Lionel October said in an interview on recently.

October was commenting on a World Bank report on SA released last week in Johannesburg. The bank recommended the government redirect its tax incentives to labour-intensive industries such as agriculture and manufacturing to boost growth and job creation, saying that the social returns in manufacturing were greater than for mining.

The government wants to provide grantbased incentives for agriculture and tourism similar to those offered by the US, the EU and Japan to support key sectors. This is the kind of support SA withdrew in the 1990s. "That was the biggest mistake we made as a country. We're the only country

in the world that doesn't have support for agriculture. So, we're at an absolute disadvantage."



Since 2007 and 2008 the Dept. has been pushing an industrial policy to reverse withdrawal of support. The clothing and textiles sector was almost decimated, but the department introduced an incentive scheme six years ago that resulted in the creation of 6,500 jobs. The automotive sector incentive has been in force for 20 years and about R150 billion worth of

exports leave SA every year. A R1 billion incentive scheme has been devised for downstream agro processing such as poultry, red meat and fruit. In addition, funds to the agriculture sector would be increased incrementally.

The department is working with the World Bank to develop ways to streamline investment and regulation across all three tiers of government. The World Bank has highlighted SA's growth rate as being too low to lift citizens out of poverty and joblessness. The World Bank recommends that the country lift its economic growth by rebalancing its imports to stimulate domestic product consumption, since investment has remained weak.

The World Bank said the five sectors that were generally most responsive to tax incentive schemes were those with the largest employment multipliers. They are typically agriculture, trade and hospitality, community and social services, construction, and manufacturing.



7

NKOMAZI SMALL-HOLDER COTTON FARMER PROJECT

During the past planting season, a total of 2 767 ha of cotton was planted in Nkomazi, Mpumalanga. The area is south of Komatipoort and stretches down to the Swaziland border alongside the Lebombo mountains, which borders Mozambique.

ith the funding support from the Dept. of Rural Development and Land Reform (DRDLR) and the ARC with Cotton SA as mentor and implementing partner, the small-holder cotton farmers in Nkomazi are expecting a substantial crop. The Nkomazi area is ideally suited for cotton with a long history of producing quality cotton. Statistics indicate that more than 40% of the population in the Nkomazi municipal area is unemployed, but with the cotton industry active there is now hope.

Participation

The dilemma and major challenge with rural agriculture development is to involve the youth to participate in farming. The Nkomazi small cotton farmers have a base of knowledgeable leaders with a long history in cotton production and 19% of

the participating farmers consists of youth, of 1 307 ha by mechanization. Each mainly women. farmer is also responsible for the chemical

The participating farmers are part of 18 primary cooperatives, with Lebombo Secondary Agricultural Co-op as the central organization. Currently 718 farmers, as the sole beneficiaries of the project, have planted cotton on land sizes ranging from 1 - 10 ha each. The arable land is situated around small rural towns, with most of the cotton fields within walking distance. Due to the extreme heat in summer, cotton farmers can be seen after daybreak working in the fields. With the passion and diligence of the Nkomazi small scale cotton farmers, success is imminent.

Production

Of the 2 767 ha planted this season, 1 460 ha was planted by hand and the balance

of 1 307 ha by mechanization. Each farmer is also responsible for the chemical crop protection of the hectares that they planted by hand, as well as fencing and harvesting for the entire production area, again illustrating the positive attitude of the Nkomazi small-holder cotton farmers.

The small-holder cotton farmers expect to contribute in the financing of future input costs. Through the secondary cooperative and working together towards a common goal of sustainability, it is certainly achievable. Of all the crops planted on dryland, cotton is performing the best even with little rainfall, making dryland cotton a viable summer crop in the Nkomazi area. To further enhance the quality of the cotton crop and marketing prospects, it was decided by the cooperatives that they want to participate in the BCI (Better Cotton Initiative) programme.



With increased funding to supply more mechanization and fertilizer to plant the future crops, more job creation and poverty alleviation is possible. Membership of the 18 primary cooperatives is voluntary but for planning, implementation of production, control and training, the organizational structures of a cooperative is imperative. The 718 small scale cotton farmers, as members of the 18 primary cooperatives, are represented by a small leadership group of their own choosing in the Lebombo Secondary Agricultural Coop. By using a collective approach, decisions in the field are taken in conjunction with the leaders of each primary cooperative, the secondary cooperative and the farmers.

Current season

The available land for production is stretched over an area of 60 km by 25 km, which especially complicates the mechanization part of the production. Since the rainfall differs from one area to

the other, planting was scheduled with the Future moisture content of the soil in mind. The result is a staggered crop, some of the areas measured up to 477 mm and other only 299 mm from the start of the raining season in September 2016. The entire crop was planted on dryland with a 50 year long term average rainfall of 679 mm per annum for Komatipoort, which is more than sufficient for cotton production.

During this current season the Mpumalanga office of the Dept. Of Agriculture, Rural Development, Land and Environmental Affairs (DARDLEA) has assisted the farmers with additional mechanization equipment that enabled more cotton to be cultivated by means of mechanization, ultimately with a better yield. No major outbreaks of pests were encountered so far, but white fly seem to be a problem every year. An intensive crop protection spraying programme is in place to manage any threats to the crop.

As the project is currently in the first year of funding, the farmers and everybody involved know that they need to make a success to qualify for further funding from DRDLR. Due to the distance of the nearest cotton gins, the building of a cotton gin in the Nkomazi area is urgently needed. A feasibility study to investigate the sustainability of a cotton gin is currently underway.

With 11 000 ha of dryland available, the future for cotton production in Nkomazi is promising as cotton farming here is a lifestyle practiced by knowledgeable and hardworking small-holder farmers.

As Mr Robert Nkalanga, Chairperson of the Lebombo Secondary Agriculture Coop and representing the Nkomazi cotton farming community, often says: "Our farmers will succeed because they are farming with cotton".



Scientists Crack Genetic Code for Leaf Shape in Cotton

variation can mean big differences in a farmer's boll rot than what researchers refer to as bottom line. Now, a new discovery gives plant "normal" leaves. The okra leaves also allow

breeders key genetic information

to need they develop crop varieties that make the most of these leafshape differences.

Researchers in the US recently described how they manipulated the genetic code to alter the shape of a cotton

plant's leaves in potentially beneficial ways. Scientists have recognized that cotton plants with leaves that have five deep lobes, like the leaves of the okra plant, offer advantages to

□lants come with an astounding array of leaf farmers over stably yielding "normal" leaves. The shapes, and researchers know that this so-called "okra" leaves are less susceptible to

more evenly across the and plant associated with higher rates of flowering and of rates earlier maturity.

The okra leaf type also increases the expression of photosynthetic genes, pro-

viding a link between leaf shape and

the ability of plants to convert light into energy for growth. It is believed that this leaf architecture will result in an ideal cotton cultivar capable of combining the advantages of the two leaf shapes.

Britain back into cotton spinning

Ritain's first cotton mill for more than 30 Dyears has opened last year in Tameside, Greater Manchester. English Fine Cottons will be the sole cotton spinner in Britain with the only plant in Europe producing cotton yarn, from fibre preparation to spinning and winding.

A former Victorian cotton mill is now home to the most modern cotton spinning facility anywhere. The idea is to create a true 'Made in Britain' business, sourcing premium raw materials globally to produce some of the finest quality cotton yarns available. The company expects to produce 500 t a year and to double production by the end of 2017.

MAR



U.S. Farmers: GMO Crops Help Reduce Inputs and Enhance Conservation

n October last year, over 280 farmers across the US were surveyed about their attitudes toward GMO crops. They were asked to weigh in on a range of topics regarding the impact of GMO technology on the environment, pesticide use, and yields, among others.

Findings conclude that farmers believe biotechnology helps raise crops more efficiently, and that the environment and sustainability practices will suffer if GMO technology utilization is reduced in crop production in the future. 78% of farmers foresee increased environmental impacts, including an

increase in water usage and application of pesticides, if GMO seeds were not to be available to them as a choice in crop production.

Additional survey findings include:

87% of farmers indicated GMO seeds allow them to minimize pesticide and herbicide usage. Sustainability: 64% of farmers believe GMO seeds allow for efficient management of resources, specifically, fuel, time and less wear-andtear on their equipment. 69% of farmers believe GMO seeds produce a higher yield.



Die onlangse aankondiging oor 'n nasionale minimum loon wat op 1 Mei 2018 in werking sal tree, is gebaseer op 'n uurlikse tarief van R20. Die landbousektor sal vir eers 90% van genoemde loon moet betaal. Dit kom daarop neer dat landbou R18 per uur sal betaal. Die 2018 implementeringsdatum is nou 'n jaar vroeër as wat aanvanklik aangekondig is.

Die landbou sal reeds vanaf Maart vanjaar R15.39 per uur betaal. Dit is na aanleiding van 'n verhoging wat deur die Minister van Arbeid aan die minimum loon vir landbou aangebring is, wat die minimum loonvlakke vir landbou reeds met 8% verhoog het. Dit bring landbou alreeds nader aan die loon wat aangekondig is.

Periode	Mndeliks	Weekliks	Daagliks	Uurliks
1 Mrt 2016 - 28 Feb 2017	R2778.83	R641.32	R128.26	R14.25
1 Mrt 2017 - 28 Feb 2018	R3001.13	R692.62	R138.25	R15.39
1 Mei 2018 - 30 Apr 2019	-	-	-	R18
1 Mei 2019 - 30 Apr 2020	-	-	-	R20

Uzbekistan Cotton and Textile Industry

Uzbekistan, the world's 6th largest cotton producing country has set a task to process all cotton produced in the country into textiles by 2020, as against 40% of the cotton that is processed currently, from just 7% in 1991. As of date, the country exports textiles to over 50 countries. According to Uzbek media reports, of overall textile exports, yarn shipments account for nearly 50%, which will be gradually replaced with value added textile products. In order to achieve the goal, the country plans to invest around \$2.2 billion, half of which the country expects to come from foreign investments. There is also a plan to build textile complexes, which will house facilities beginning from spinning up to the processing of fabrics. The plan is to also create 27,000 new jobs through these investments, while also upgrading 10 existing textile mills.

Robotics in Agriculture

Robots could scoop up the remainder of jobs in agriculture over the next two decades, as machines become smarter, cheaper, and more efficient. That's according to a new report by Lux Research that reveals how robots and autonomous systems could take over and change the agriculture industry.

The term, robotic agriculture, may sound very unreal and people may have different views about it. However, it is a reality and soon it is going to be on every farmer's lips. Robotic agriculture is a new way for farmers to use their implements without any labour and where the tractor operates on its own.

Lux argues that in the near future, we are going to see farming robots that are not only much cheaper than human labour, but capable of executing tasks with much more efficiency and accuracy. That could lead to higher crop yields for farmers and a workforce that doesn't need to rest every few hours. Field crops are already seeing autonomous systems enter the workforce. An Autosteer system for

with large-scale market introduction largely delayed not by technical issues but by regulation, high sensor costs and the lack of farmers' trust. This is expected to change by 2022 when sales of unmanned tractors are expected to pick up.

Robotic agriculture is not restricted to tractors, but can be applied for any farming need you have. For example, a fully-autonomous agricultural robot named Agbot II, designed and built by the Queensland University of Technology (QUT) with support from the Queensland Government in Australia, was demonstrated for the first time last year. It is estimated that this technology could save Australia's farm sector \$1.3 billion a year by reducing

Professor Perez said Agbot II has demonstrated an outstanding performance in the use of robotic vision and artificial intelligence for the detection and classification of different weed species. "The cutting edge robotic vision gives Agbot II the ability to spotspray selected weed species and use mechanical tools to remove other weeds species that are herbicide resistant," Professor Perez said. "To date, we have concentrated on the three weeds that are relevant to Queensland: volunteer cotton, sow thistle and wild oats, and the vision system operated with 99% accuracy in the classification of the correct species based on the images collected by the robot cameras." He said one of the key problems is that weeds are becoming increasingly immune to



tractors and harvesters has already reached a 10% market penetration in the USA.

Tractor guidance and autosteer technologies are going mainstream thanks to improvements and cost reductions. More than 300 000 tractors equipped with autosteer or tractor guidance technology have been sold globally in 2016 alone, rising to 660 000 per year in 2026. These tractors use RTK GPS technology to autonomously pre-planned follow paths with centimeter-level accuracy. This makes agriculture the largest adopter of autonomous navigation.

Unmanned autonomous tractors have also been technologically demonstrated

the costs of weeding crops by around 90%.

Professor Tristan Perez, leader of QUT's agricultural robotics program, said Agbot II's sensors, software and other electronics enable it to navigate through a field, detect and classify weeds and then kill them either mechanically or chemically. The robot can also be used to apply fertiliser.

"In future versions, these robots could also provide feedback data on such things as soil and crop health and the state of diseases as they conduct their operations. This would enable better management decisions driven by realtime information," he said. chemical control and that was why it was important an agricultural robot could not only detect, but classify the weed species on the spot and decide which actions to take to treat them.

"Agbott II's vision system can identify weeds and decide in real time which are better to spray and which are better dealt with, for example, mechanical or thermal methods," he said. "The light weight of AgBot II, which is about 600kg, will help reduce soil compaction that affects the yield by limiting the root development of the crops. Also due to weight, the robots can be deployed faster onto fields after rain to keep a tight control of weeds before they drop their seeds". AgBots are also designed to work in groups, which increases the reliability of weeding operations. If one robot

has a problem and fails, the others continue operating. This is not the case with a single tractor or single sprayer operation. Agbot II is solar powered at present, which is better for the environment and the farmer's budget.

The QUT team is currently in discussion with poten-

tial commercialisations partners to take this technology to Australian farmers soon.

There is also a vast market for drones (unmanned aerial vehicles or UAV's) due to their usefulness in various branches of agriculture. According to a report from RnR Market Research, the worldwide market for agricultural drones currently sits at close to \$500 million, but RnR expects that amount to balloon to \$3.69 billion by 2022. The main function of drones is the composition of detailed aerial maps of farms. Drones can also be loaded with multi-spectral sensors

that measure key indicators about plant health, yields, water stress levels and nitrogen deficiencies. pest infestation before irreversible damage of plants occur. The information will determine exactly



Drones equipped with multispectral cameras can also determine areas of



campaign, only focussing on cropthreatening clusters of pests.

> Accordina to а recent IDTechEx Research report, agricultural robots and drones will grow to a \$10 billion market by 2022. The robotic market and technology developments will change the business of agriculture in future, enabling ultra-precision farming and assist in addressing the key global challenges. Within the next decade, farming as we know it is expected to be revolutionized by the use of self-driving tractors, robots and drones that can perform timeconsuming tasks now done by humans.

Koot Louw - Cotton SA



TYPICAL CROP PROTECTION DRONE

A drone such as this can carry up to 10kg of liquid payloads, including pesticide and fertilizer. The combination of speed and power means that an area of about 4 ha can be covered in an hour which is 40 to 60 times faster than manual spraying operations. The intelligent spraying system automatically adjusts its spray according to the flying speed so that an even spray is always applied. This way, the amount of pesticide or fertilizer is precisely regulated to avoid pollution and economize

operations. During flight, the drone scans the terrain below in real-time, automatically maintaining its height and distance from plants to ensure application of an optimal amount of liquid. The drone also automatically records its current and remembers its past coordinates as it makes its way across the field. In case the operation is interrupted, for example due to depleted battery or spraying liquid, flight can easily be resumed from the last point in its memory after changing the battery or refilling its tank.

airplanes spray indiscriminately, covering the entire area with a mist of in s e c t i c i d e. Drones can replace this in d is criminate approach with more of a targeted

which areas need

to be sprayed by

employing drones,

thus reducing the

pesticides used.

Crop dusters on

of

volume

FABRICATING ELECTRO CONDUCTIVE COTTON TEXTILES USING GRAPHENE

Cotton is among the most widely used fibres in clothing and its properties make it an excellent choice for textile electronics.

A new process, developed by Dr Felice Torrisi at the Cambridge Graphene Centre (CGC) and his collaborators at the Jiangnan University, is a low-cost, sustainable and environmentally-friendly method for making electro conductive cotton textiles by impregnating them with a graphene-based conductive ink. The adhesion of the modified graphene to the cotton fibre is similar to the way cotton holds coloured dyes, and allows the fabric to remain conductive even after several washes.

Although numerous researchers around the world have developed wearable sensors, most of the technologies rely on rigid electronic components mounted on flexible materials such as plastic films or textiles. These offer limited compatibility with the skin, are damaged when washed and are uncomfortable to wear because they are not breathable. "Other conductive inks are made from precious metals such as silver, which makes them very expensive to produce and not sustainable, whereas graphene is both cheap, environmentallyfriendly, and chemically compatible with cotton," explains Dr Torrisi. Co-author Professor Chaoxia Wang of Jiangnan University adds: "This method will allow us to put electronic systems directly into clothes. It's an incredible enabling technology for smart textiles."

According to the researchers, a wearable strain sensor created using a graphene-coated smart cotton textile, has been shown to detect up to 500 motion cycles reliably after more than 10 washing machine cycles. Smart clothes are a highly promising field of development, where everything from health monitors to LED displays are integrated into clothes.

Integrating tech into clothes have created all sorts of new smart textiles. For example, researchers have developed clothing that contains sensors to measure heart rate, breathing rate, and all sorts of bio-indicators. There have also been a spate of electricitygenerating clothing. These textiles integrate photo voltaic material or motion-gathering generators into the fabric, to one day give you the ability to charge your phone or power a device using your clothes.

Koot Louw - Cotton SA





Outlook on Textiles & Clothing TEXTILE TRADE WITHIN THE CUSTOMS UNION

The Southern African Customs Union (SACU) is an agreement between South Africa, Botswana, Lesotho, Namibia and Swaziland (BLNS). It was established in 1910, making it the world's oldest customs union. Historically SACU was administered by South Africa through the 1910 and 1969 Agreements. Negotiations to reform the 1969 Agreement started in 1994 and a new agreement was signed in 2002. from the BLNS countries in the official customs statistics. The reason being that South Africa's exports of goods show a better picture when our trade with SACU is included in the figures. According to the estimated figures for 2016, approximately 42% of the value of total exports of textiles and clothing went to the BLNS countries, whilst 13% of the value of total imports of textiles and clothing came from the BLNS countries.

The objectives of the Customs Union are, amongst others, to promote conditions of fair competition in the customs area, to facilitate the equitable sharing of revenue arising from customs, excise and additional duties levied by member states, to facilitate the cross-border movement of goods between the territories of the member



The official statistics show that the value of textiles and clothing imports increased have since 2014. Clothing represents the majority of imports from the BLNS countries. The exports of textiles and clothing also showed an increase, with clothing representing the major part.

states and to create effective, transparent and democratic institutions which will ensure equitable trade benefits to member states.

South Africa and Lesotho are the major players in the textiles and clothing trade within the SACU region. The clothing industry in Lesotho is the country's largest formal employer and has approximately

The economic structure of the Union links the member states by a single tariff and no customs duties between them. According to the old Agreement, the Customs Union collected duties on local products and customs duties on imports from outside and SACU. the resulting revenue was allocated to



40 000 workers in the textile and clothing industry. Lesotho has about 40 factories specialising in both woven and knitted garments. By comparison South Africa currently employs about 34 200 workers in the clothing industry and 36 200 workers the textile in industry.

member countries in quarterly instalments using a revenue-sharing formula. The new revenue-sharing formula began in 2006 and is based on three components, namely customs, excise and development.

Since 2013/14 South Africa has started to include the South African "imports" and "exports" of goods to and

One can only hope that the SACU agreement will continue to enhance the economic development, diversification, industrialization and competitiveness of the member states and that there will be substantial investment opportunities in this common customs area in future.

Helena Claassens - Cotton SA



THE FALL ARMYWORM IN SOUTH AFRICA

Fall Armyworm Identification



Summary of a briefing to the Portfolio Committee on Agriculture, Forestry and Fisheries on 14 February 2017.

Fall Armyworm (FAW) he (Spodopterafrugiperda) originates from the tropical regions of South America and the Caribbean region and is also present in some southern states of the USA. It is a serious pest attacking maize in Brazil and other South American countries. It was reported in Africa in 2016 (West and Central Africa, Zambia and Zimbabwe) with yield losses of bewteen 30-60%. The moths are strong fliers easily migrating to new areas making use of prevailing winds and weather systems.

The FAW is classified as a quarantine pest for SA and DAFF sent out an alert on 17 January 2017 in response to media reports of this pest appearing in Zambia and Zimbabwe. Farmers form the Limpopo and Northwest provinces also reported suspected FAW caterpillars mainly from the Limpopo and North West Provinces and a preliminary action group met on 25 January 2017 to initialize response.

Larvae were collected, pupated and the emergent moths positively identified by the ARC on 3 February 2017.

The FAW can attack over 80 different plant species, the main hosts being maize, sorghum, groundnuts, cotton, soybean and sugar cane. Additional host plants include pasture and other grasses, spinach, lucerne, sunflower, wheat, cabbage and potatoes. The FAW feeds on leaves especially when they are still at younger growth stages but during heavy infestations, larvae will also feed on corn ears. F Foliar damage to corn is usually characterized by ragged feeding, and moist sawdust-like frass near the leaf whorl and upper leaves of the plant. T

Distribution of the FAW in SA so far:

 Limpopo: reported by farmers as widespread (Musina, Pontdrift, Levubu, Tshakuma, PundaMalia, Vivo, Marken, Dwaalboom, Thabazimbi, Lepalele, Makopane, Mashashane, Chuniespoort, Mokgopong, Letsitele, Bochum, Bela Bela, Settlers and Rust De Winter) and confirmed at: Pontdrift, Musina, Levubu, Vivo, Makopane, Mashashane, Mokgopong, Chuniespoort, Letsitele, Settlers and Rust De Winter.

- Gauteng: northern and eastern parts and confirmed at, Bon Accord, Pyramid, Bronkhorstspruit and Roodeplaat.
- North West: western parts, confirmed at Rustenburg and Swartruggens.
- Mpumalanga: Schoemanskloof, Hendrina, Middelburg.
- Free State: Petrus Steyn.
- Northern Cape: Douglas.

Reports indicate that the following have been attacked: maize (especially sweetcorn, and seed maize) and sorghum.

The following nine chemical active ingredients have been registered for use on the FAW in SA according to emergency registration procedures :Indoxacarb, Chlorantraniliprole, Emamectin benzoate, Flubendiamide, Lufenuron, Methomyl, Indoxacarb / novaluron, Malathion and Chlorpyrifos (others are pending registration).



For reporting all observations /outbreaks, please contact: Directorate: Plant Health Division: Early Warning System Mr Jan Hendrik Venter Tel: 012 319 6384/6104/ 0723488431 Email: janhendrikv@daff.gov.za





THE SUSTAINABLE COTTON CLUSTER AT THE END OF YEAR 3

"With Year 3 of the Cluster coming to an end on the 31st of March, I took some time to reflect on the progress we have made since the inception of this initiative. All of us are so easily consumed by our busy daily schedules that we tend to forget where we have come from and how our industry have changed over the past three years." So says Heinrich Schultz, Manager of the Sustainable Cotton Cluster.

WHERE WE CAME FROM

teamed up to come up with a plan to revitalise the cotton industry in September 2012, many challenges were faced:

- The cotton crop stood at just over 5 000 metric tons of lint, global cotton commodity prices were low and cotton producers were confronted by price uncertainty fuelled by a decreasing fluctuating Rand;
- Dryland commercial cotton farming, the backbone of the cotton production in the 1980's, was effectively non-existent due to . The cotton industry value chain was highly the high cost of harvesting;
- The commercial banks and other traditional financiers regarded the industry as high risk, which severely limited finance for cotton producers:
- Cotton Gins struggled to obtain sufficient finance to pay farmers in advance for seed cotton delivered, and we exported more than 80% of our lint production;
- Cotton Spinners could not buy from local Ginners due to the inability of Ginners to meet the Spinners' payment terms. Due to ... Although seen as an important sector from the small crop, specific grades and qualities were not available in the volumes required by the Spinners, resulting in Spinners importing almost all of their lint requirements;

- When SACPO and other industry stakeholders . The cotton textile manufacturing industry's capacity was reduced to a fraction of what is was in early 2000, mainly due to the off-shoring by local retail and also the industry's inability to compete globally:
 - Local retailers were relying on lowest-cost international sourcing and distribution strategies to enhance profits and grow sales. These actions have however begun to show diminishing returns and increasing sustainability risks;
 - fragmented and transaction orientated with very limited visibility and lack of understanding the impact of decisions between various stakeholders across the value chain:
 - Traditional industry associations had limited capacity to generate valid and reliable industry intelligence for informed decisionmaking, which made it very difficult for Government to effectively engage with the industry;
 - a job creation, economic stimulus and sustainability impact point of view, there was no industry strategy.

DRIVING CHANGE

ver the past three years, the Cluster implemented its plan to start shaping a new future for the South African cotton industry. From the start it was clear that we had to focus on generating valid and reliable industry intelligence to inform our strategy development process, whilst developing and demonstrating innovative business processes and technologies that would leapfrog our competitiveness at a global level. Today, we are delighted to say that we have achieved our objective of laying the foundation for what could fundamentally change the future of this industry.

Based on an understanding of the challenges that retailers and brands are facing, the Cluster set out to test a retail business model that effectively combines Sustainable Sourcing with Quick Response through virtual integration of the entire supply chain, from farm to retail point of sale. This is called the Integrated Supply Chain Programme (ISCP) model. An ISCP is based on a long-term strategic sourcing commitment from a retailer to the supply chain. This provides the basis for transparency and innovative ways to optimise the supply chain. The ISCP model was tested with the Mr Price Group and was successfully demonstrated at a commercial scale.

Continued on page 18

Continued from page 17

Subsequently Woolworths and Edcon also joined the Cluster and we are developing pilot ISCPs for both, while expanding the Mr Price Group programmes. Although the Cluster currently takes up close on 30% of local production, it is anticipated that future demand will consume the bulk of the local cotton crop. The ISCP model received international recognition as leading business model for virtual supply chain integration at the Global Textile Exchange Conference in Germany last year.

- In support of the ISCP model, the Cluster completed the development of a Cloudbased Information Systems Platform that traceability, caters for item-level sustainability compliance and supply chain management from fibre production to retail point of sale. Its design received an Innovation Award at the 2015 Outsystems Global Conference in Lisbon, Portugal. Implementation and demonstration of the Platform is scheduled for completion this season.
- Building on the foundation of the ISCP and the Information Systems Platform, we were able to continue with the development of innovative supply chain finance and risk management solutions. The Cluster worked with various financial institutions to change the risk perception, and successfully implement off-balance sheet trade finance solutions for Spinners and Ginners. We are also piloting a similar solution for Farmer finance this season in addition to a bespoke insurance solution to consolidate supply chain insurance into cell captives.
- The Cluster identified that an independent world-class HVI laboratory will be a key contributor to the competitiveness of the cotton industry value chain. This resulted in the upgrading of the laboratory facilities at Cotton SA. The Cotton SA HVI Laboratory became the first in the world to receive ICA Bremen certification and is today still the only facility in Africa with this status. It plays an important role in supporting transparency, traceability, and global benchmarking for the industry.
- Sustainable production is a global trend that is at the forefront of sourcing strategies of most retailers and brands. Cotton producers in America and Australia developed and benchmarked their own national standards for continuous sustainability and improvement programmes. These programmes are equivalent to the global Better Cotton Initiative (BCI) standard. The Cluster opted for the same process to put South African producers on the same level and we have successfully completed

the first year of implementing the BCI standard with selected producers. The programme will be extended to include all producing areas during the next two years.

- In order to find a cost-effective harvesting solution for dryland commercial farmers, the Cluster successfully demonstrated the Stripper Harvester technology and several of these harvesters will now be used to harvest the crop this season.
- It was further important to investigate alternative ways to increase the farmer income through processing cotton seed into valuable by-products. Due to the cost sensitive competitive nature of the edible oils market, the Cluster decided to consider alternative products and contracted North-West University to analyse cotton seed crude oil for bioparaffin purposes. Results indicated that the quality of the oil is ideally suited for refining into aviation fuel. The Cluster



teamed up with SAA and Boeing for further testing and as it stands today, all technical tests have been completed and we are testing various costing models. SAA might well be flying on cotton seed biofuel very soon.

- The Cluster conducted extensive research spanning the entire industry covering a diverse range of topics, from a historic view of the industry, to the issues impacting the current status and those informing the future. Most prominent was a Demand Study that quantified local retail demand and confirming that cotton is a preferred fibre, with a 60% market share. This demand equates to 300,000 metric tons of cotton lint. The Cluster subsequently completed audits on more than 170 textile manufacturers to determine the capacity, capability, competency, compliance, etc. of the industry (C6 Audits). This extensive research laid the foundation for the development of an industry strategy for the Cotton Sector.
- Through an inclusive industry engagement process and utilising the Cluster's comprehensive intelligence

base, a Cotton Sector Strategy was developed to pave the way for the revitalisation of the industry. This demand-led strategy translates import replacement by local retail into growth and transformation opportunities for the industry. These opportunities are significant, and a mere 25% import replacement on four basic retail product categories will require more than 50,000 metric tons of additional cotton lint, an upgrade of ginning facilities, 60,000 tons of new cotton spinning capacity, etc.

 Although cotton production increased more than 200% from 2013, South Africa has the potential to produce 100,000 tons of lint, close to the record crop of 1989.

GOING FORWARD

Implementing a national sector strategy will require substantial funding and resources, and the Cluster developed a proposed solution based on international research and on similar circumstances in other countries. The proposed solution is a weight based Industry Development Levy on imported cotton products. The proposal is to simultaneously reduce the current Advalorum Duties on these products to zero. The strategy and proposal, also aimed at drastically reducing illegal imports and resolving the fabric issue, was presented to Mr Garth Strachan, Dti Deputy Director-General responsible for industrial policy, at the Cotton SA board meeting in November last year. The Dti supported the strategy and proposed solution and will work closely with the Cluster to prepare a final solution and regulation for presentation and approval by National Government during the next two years.

The Cluster initiative requires transformational change and managing this change at all levels of the cotton industry value chain has without any doubt been the biggest challenge in moving the industry forward. However, these very circumstances are also slowly unifying the industry again, and the successful implementation of the strategy will definitely be the proverbial rising tide that lifts all ships.

I would like to thank each and every cotton industry value chain stakeholder that contributed to the profound progress we have made to date, and we look forward to growing the industry and this country to the benefit of all.

Daar is 'n rede hoekom die internasionale mark vir ons katoen vra.



GWK-produsente se katoen is wêreldwyd in aanvraag omdat dit bekend is vir uitmuntende gehalte. Ons vestig die internasionale markkanale sodat jy met gemoedsrus besigheid met ons kan doen.





"PARDON ME,

BUT I'M JUST

EXAMINING OUR

TOWELS FOR THE

COTTON MARK."

People 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 qualitytested, 100% pure cotton, you can be sure it is.

The Mark also assures you that the cotton item you're about to buy



will hold its shape, hold its colour and resist shrinking.

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



PURE COTTON AND QUALITY AND THAT'S A PROMISE.