

GLOBAL CONTEXT OF COTTON PRODUCTION

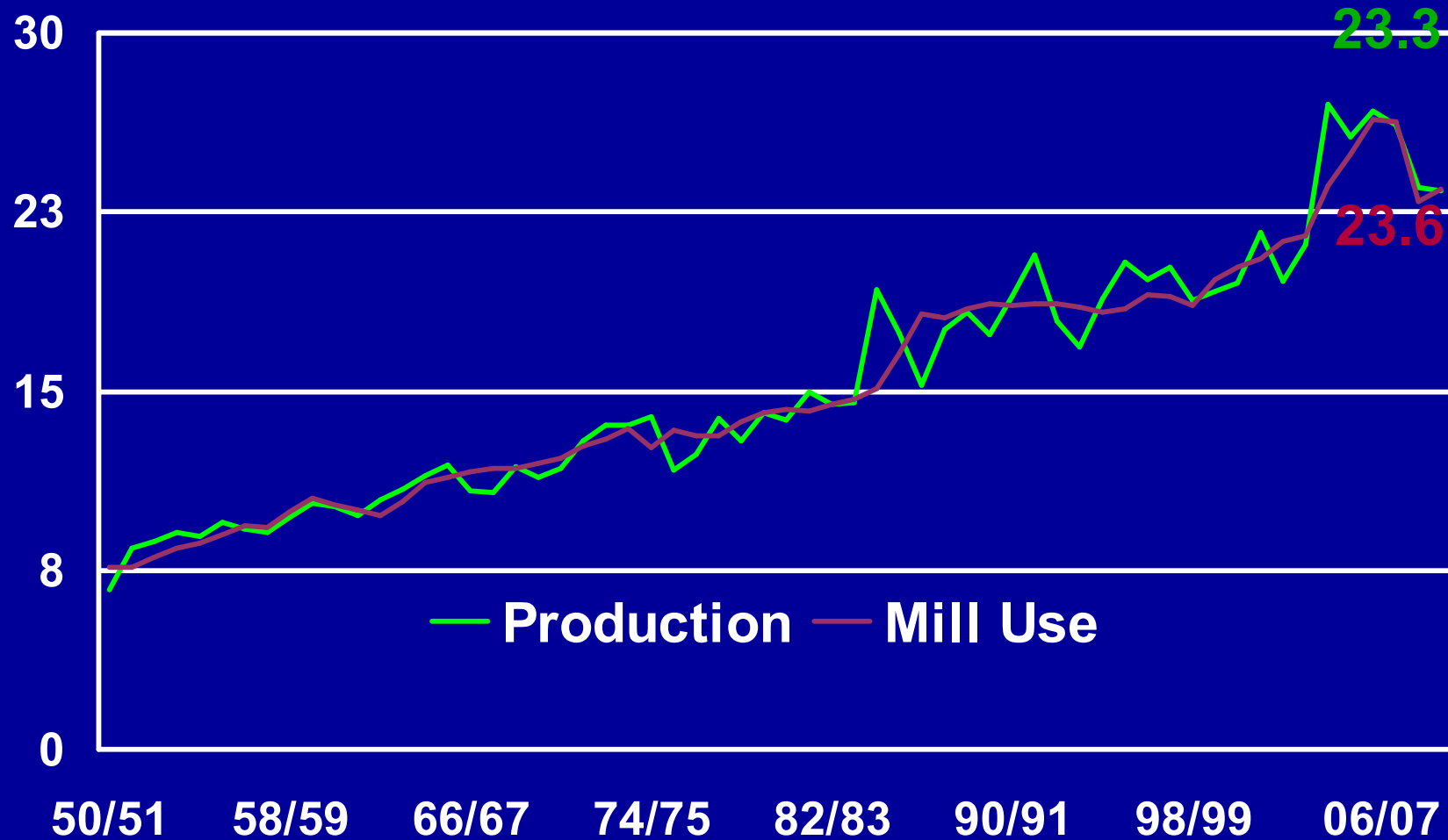


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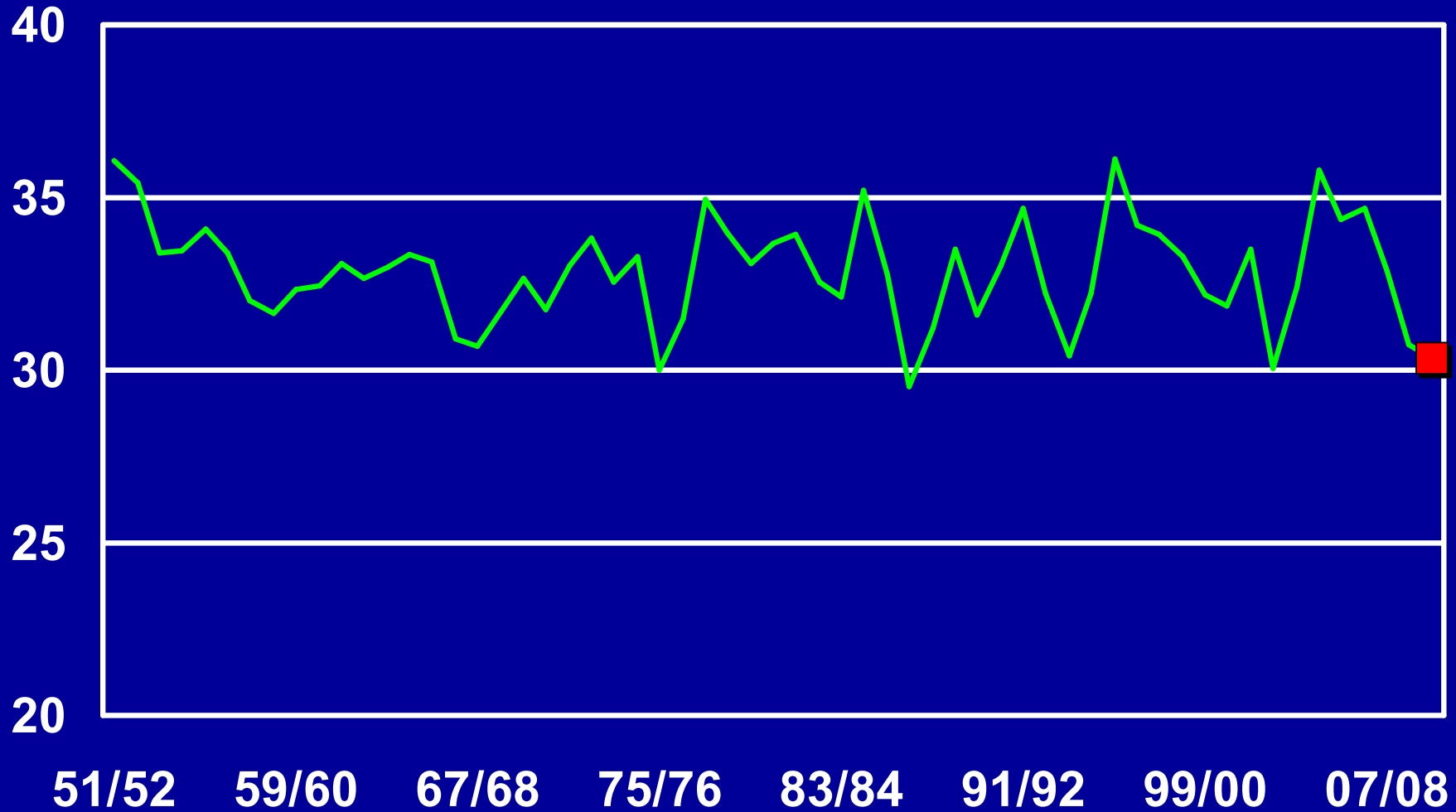
WORLD PRODUCTION AND MILL USE

Million tons



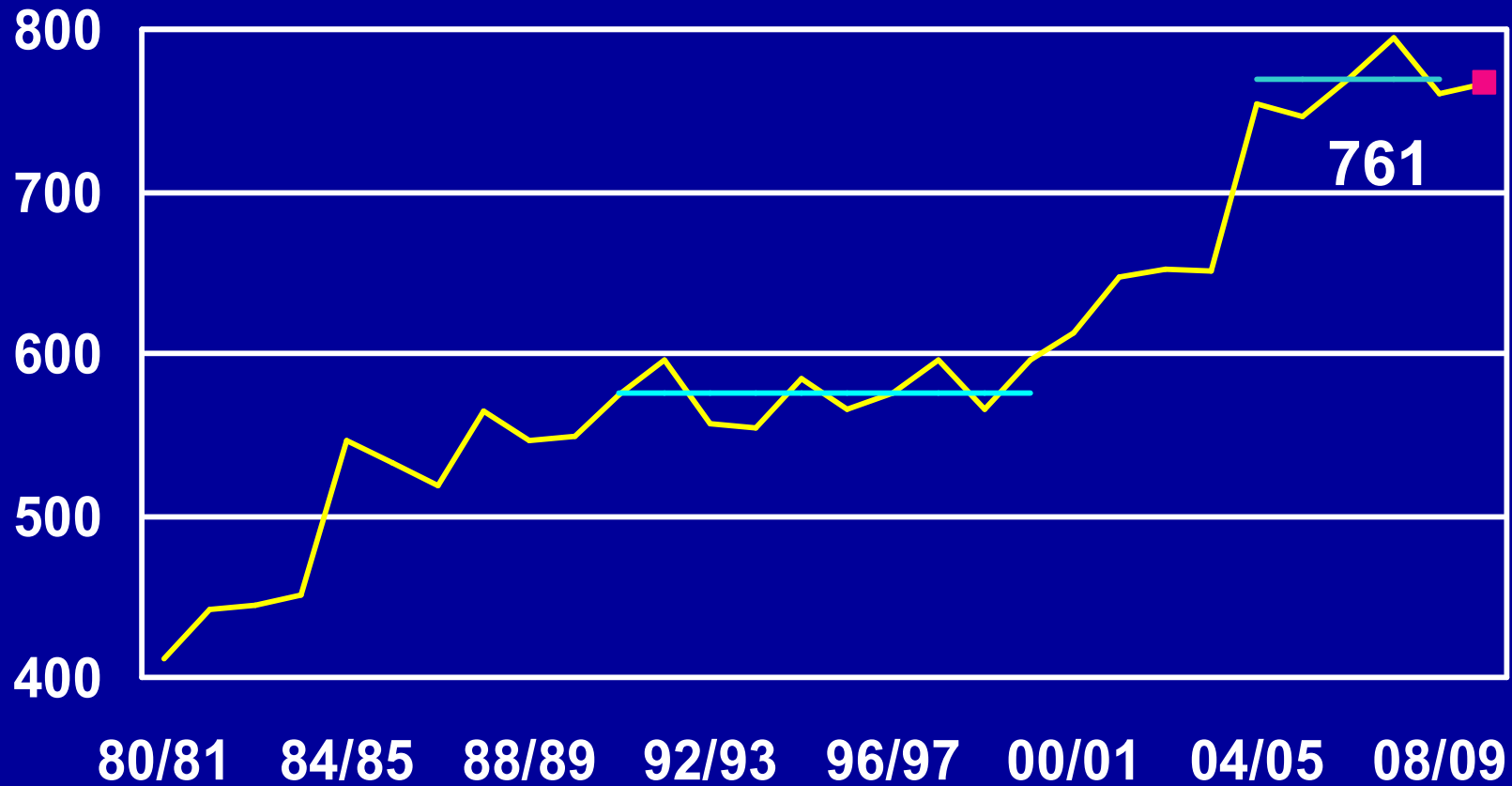
WORLD COTTON AREA

Million Ha



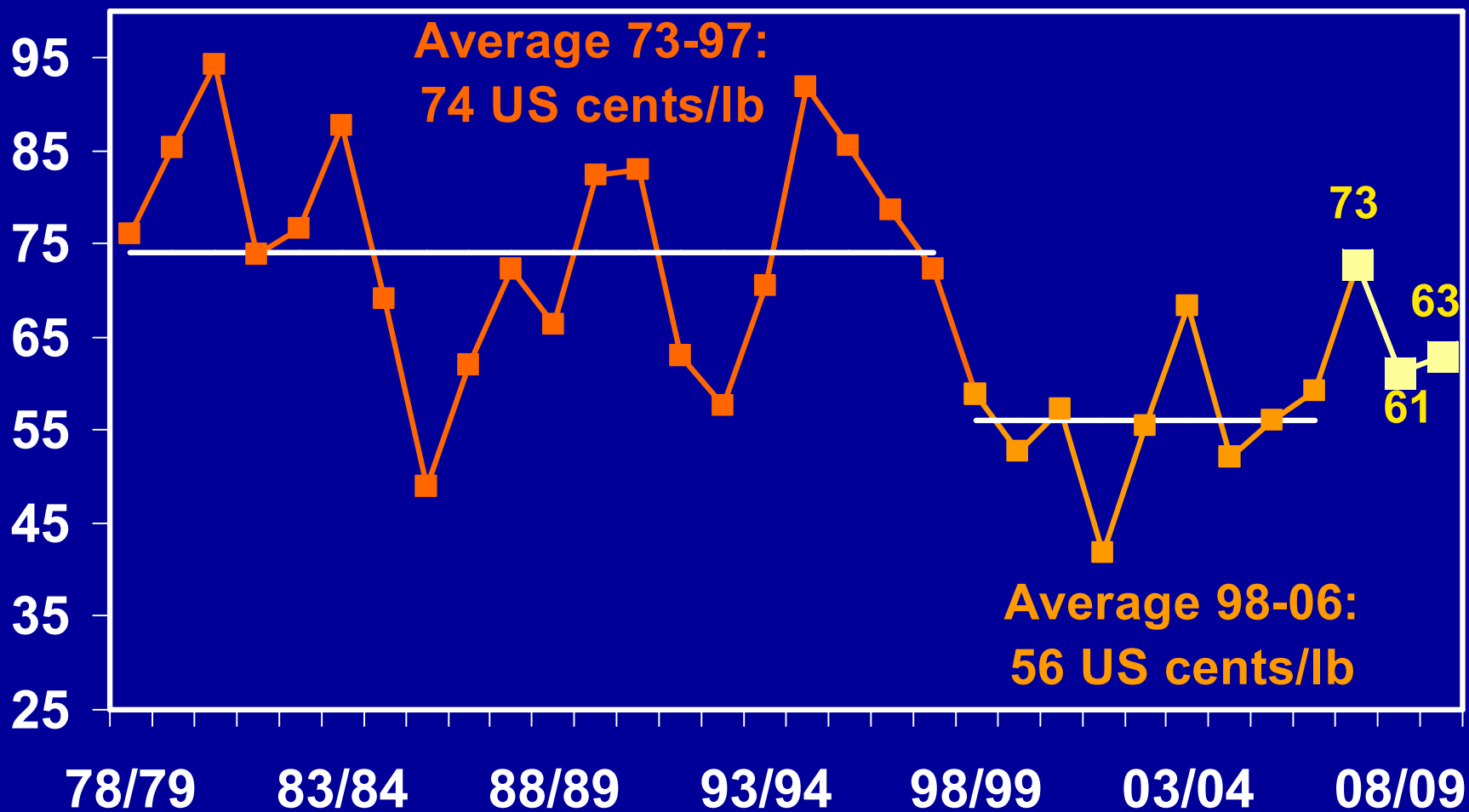
WORLD COTTON YIELDS

Kg per Hectare

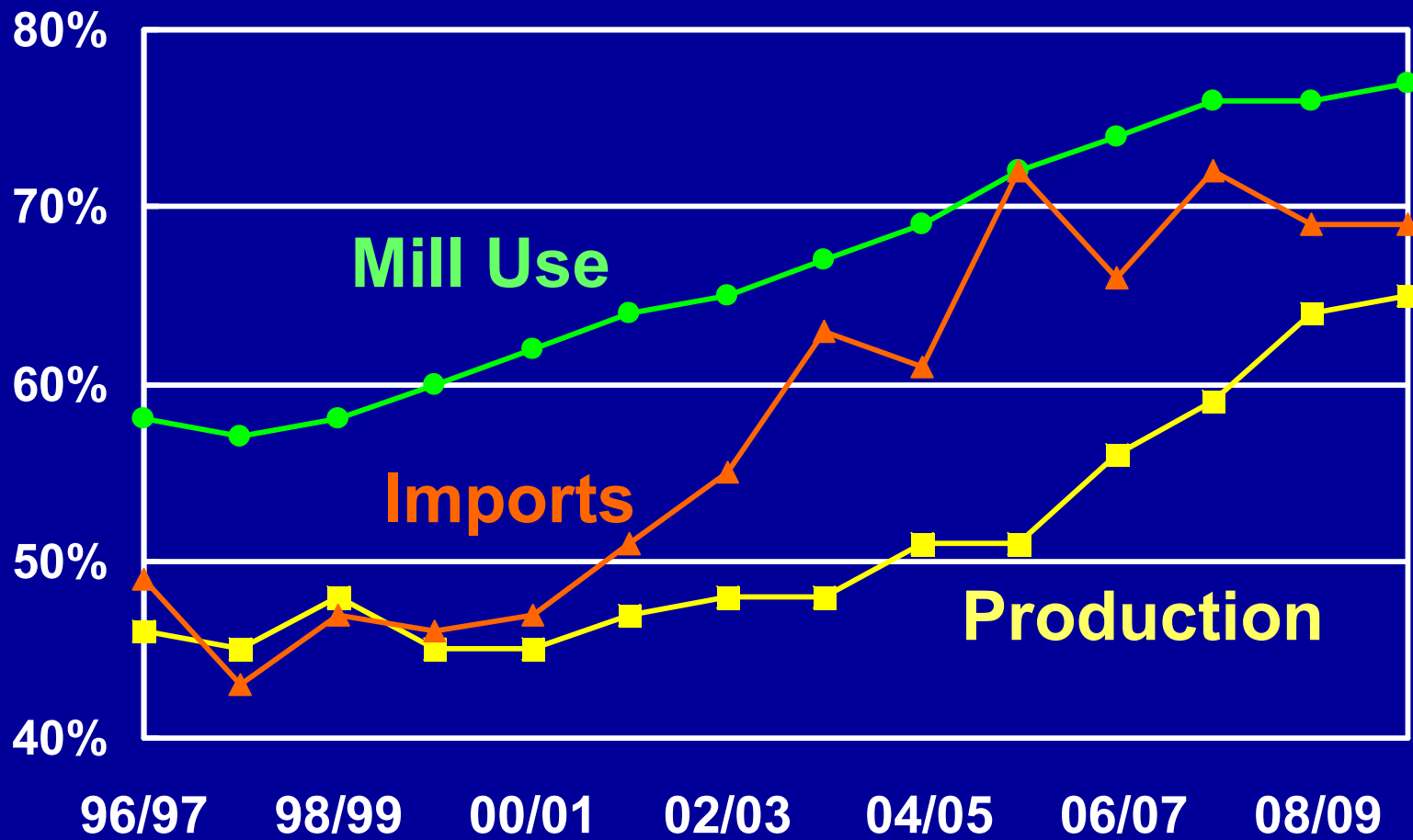


SEASON AVERAGE COTLOOK A INDEX

Season-average (US cents/lb)

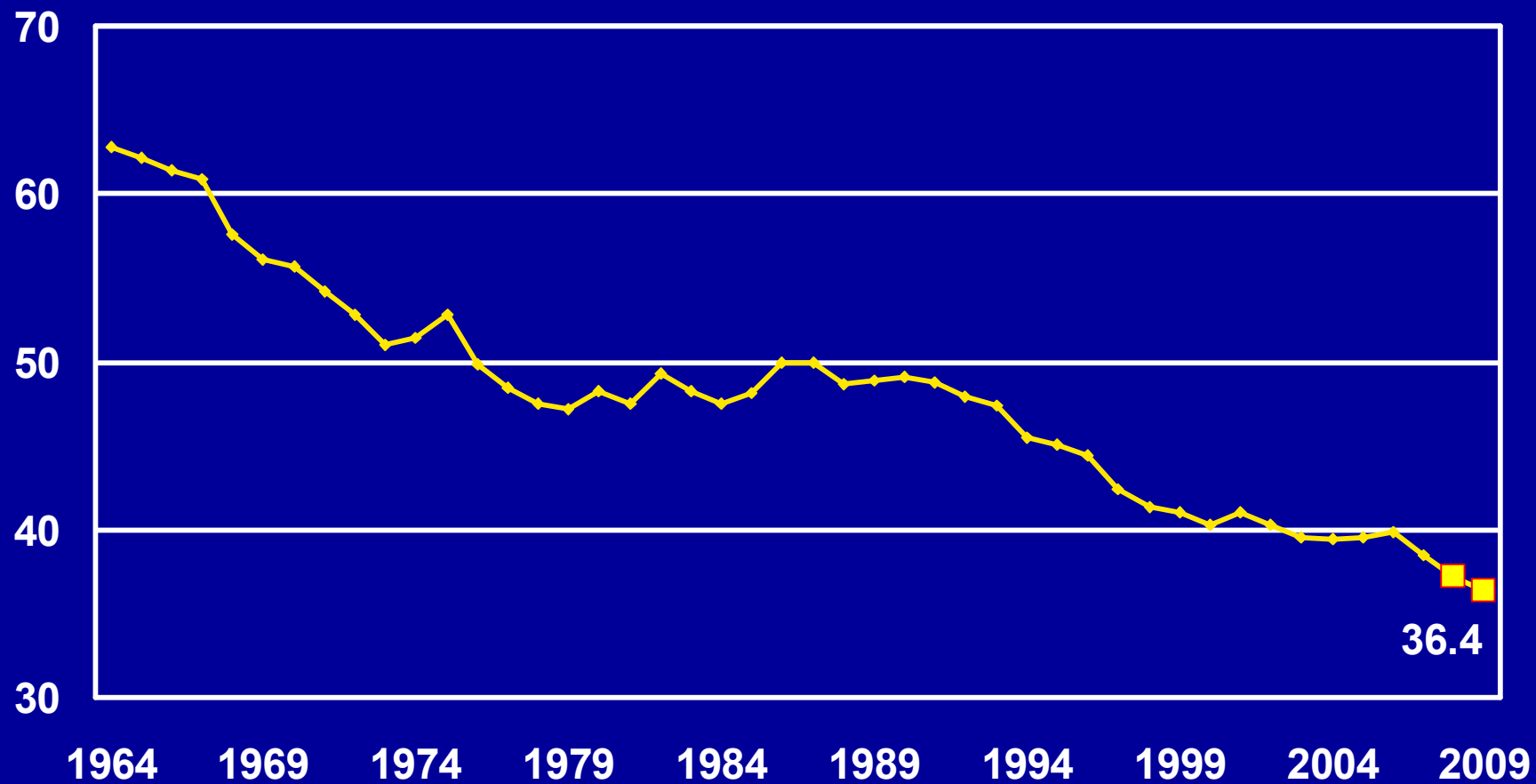


SHARE OF ASIA IN THE WORLD TOTAL



COTTON'S SHARE IN WORLD TEXTILE FIBER USE

Percent



PLANT PROTECTION CHEMICAL USE WORLD - 2008

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

PLANT PROTECTION CHEMICAL USE COTTON - 2008

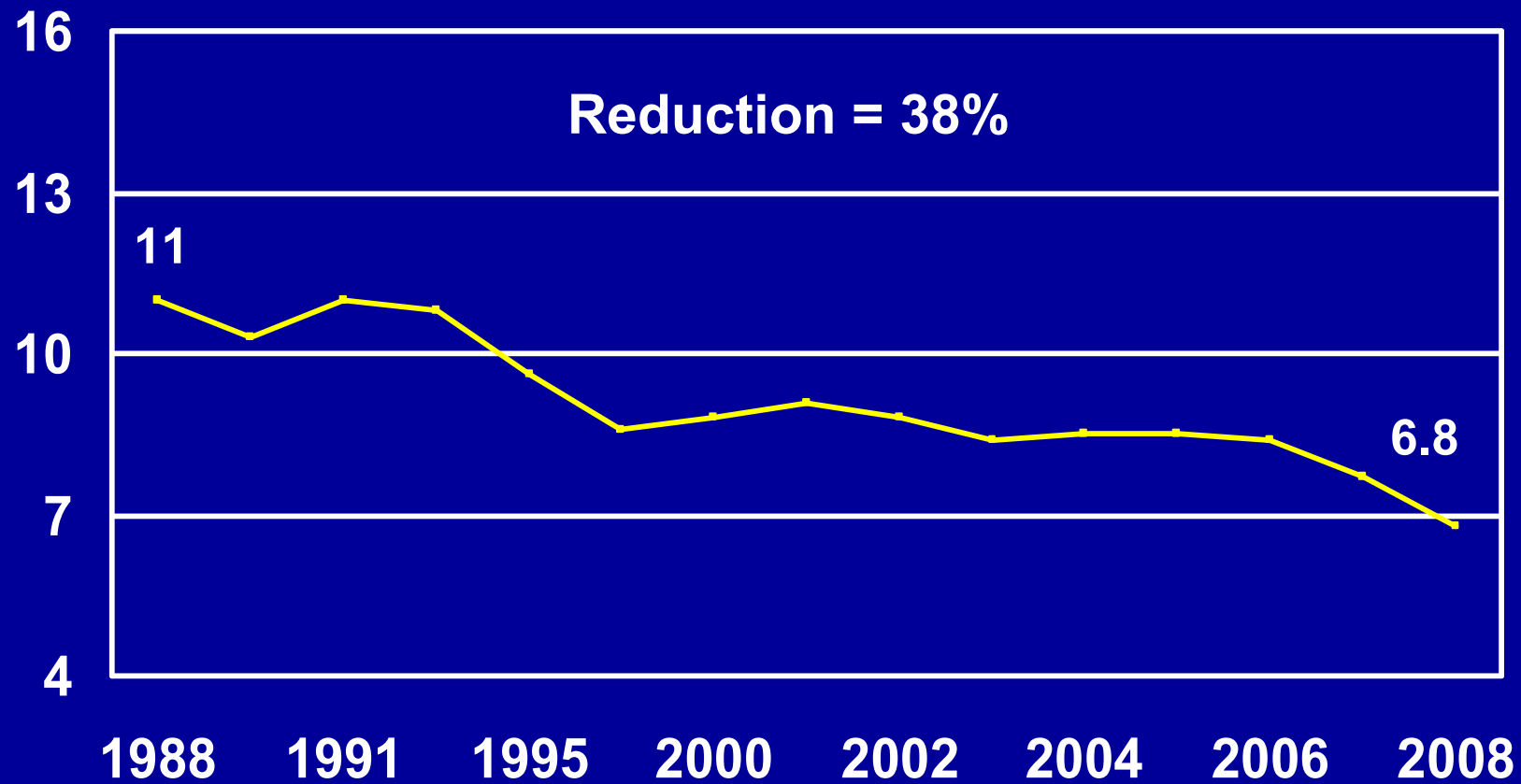
Total = US\$ 3 billion

Herbicides 6.8%

Insecticides 16%

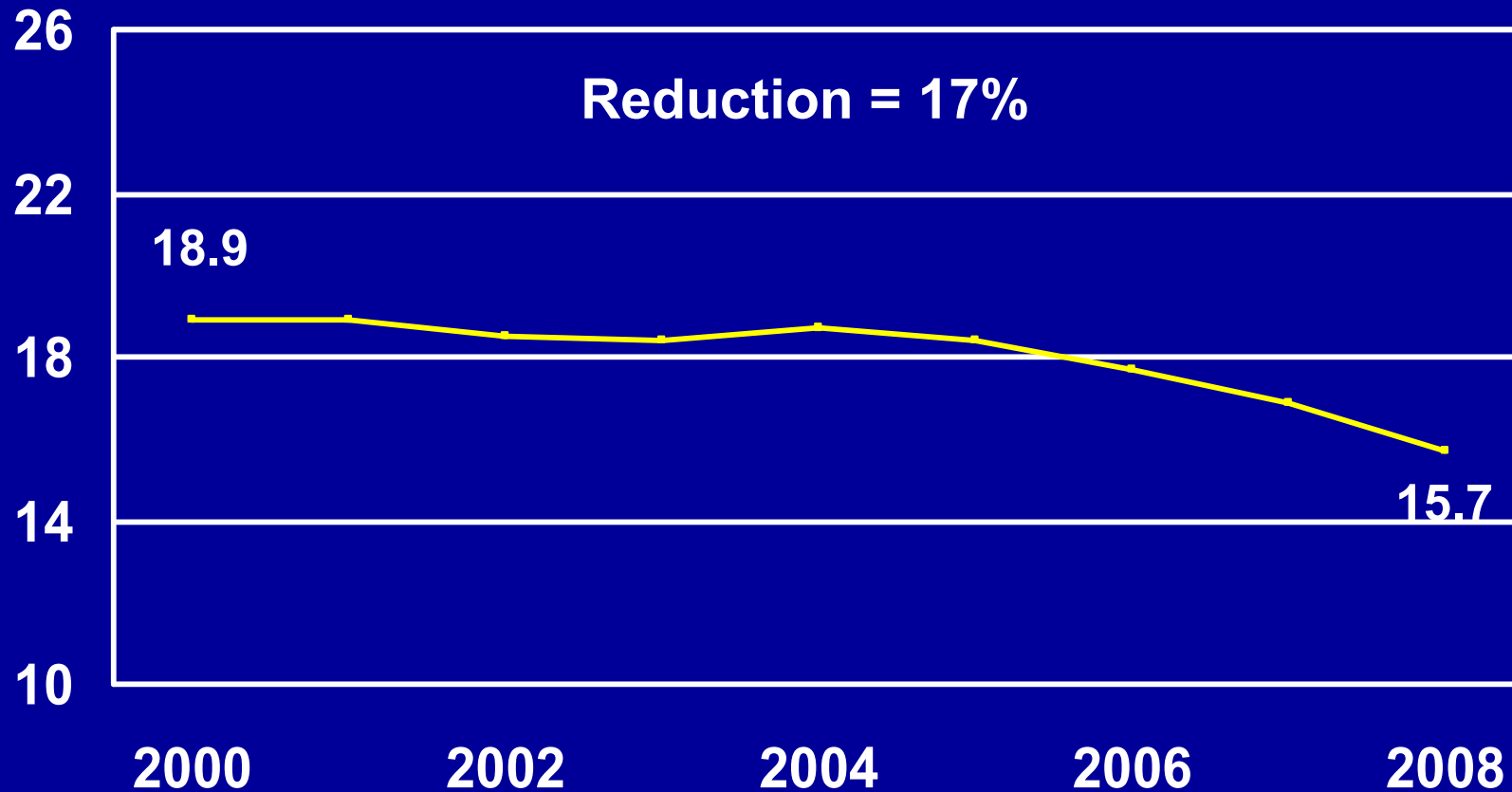
SHARE OF PESTICIDES - COTTON

Percent



SHARE OF INSECTICIDES - COTTON

Percent



LOWER CHEMICAL USE - FACTORS

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

LOWER CHEMICAL USE - FACTORS

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

CHEMICAL USE IN COTTON - FUTURE

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

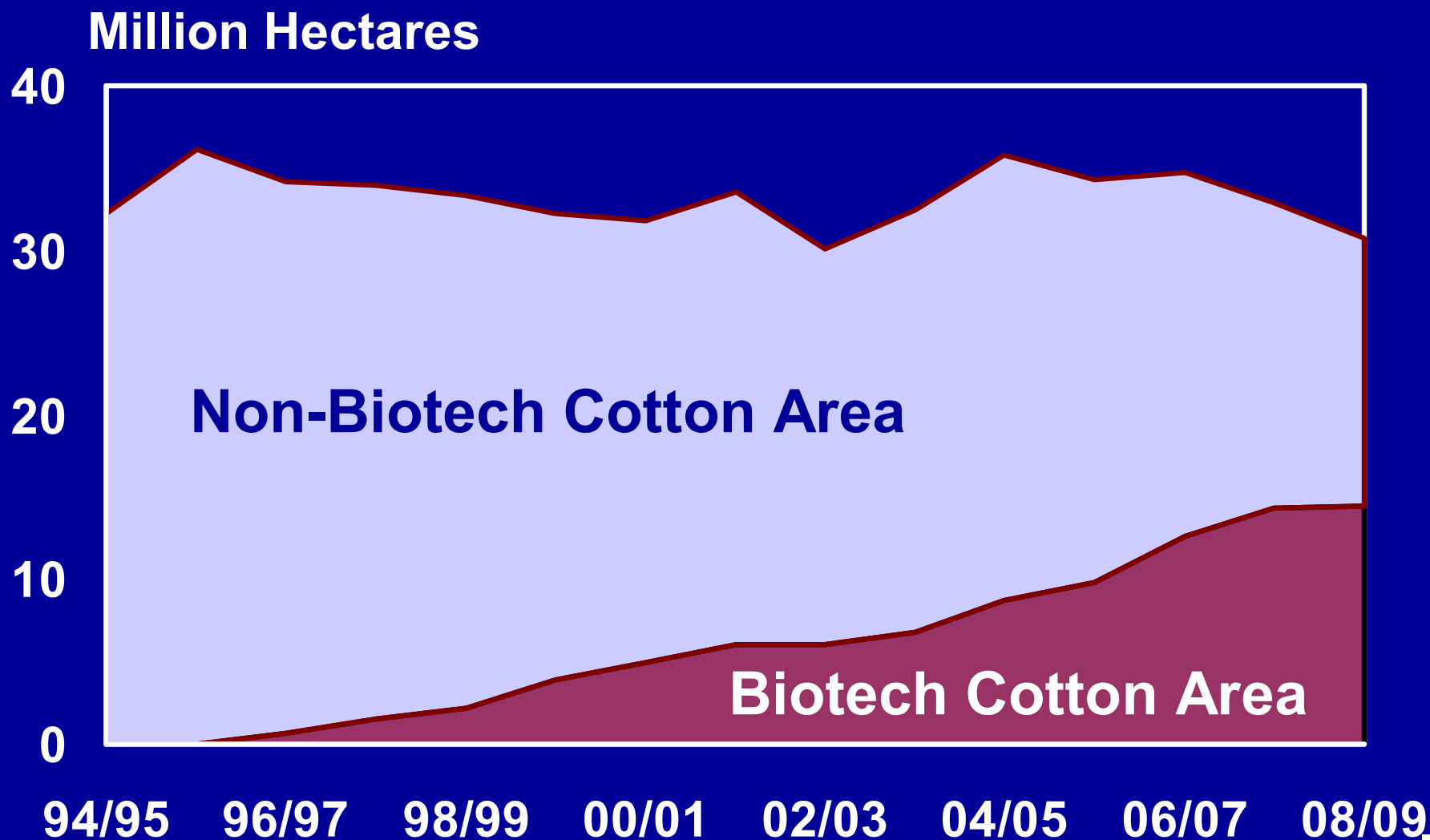
CHEMICAL USE IN COTTON - TARGET

No insecticides

FIBER QUALITY - ISSUES

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

BIOTECH & NON-BIOTECH COTTON AREA



BIOTECH COTTON - 2008/09

Area = 48%

Production = 54%

Trade = 52%

BIOTECH COTTON - FUTURE

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

MAJOR CHANGES - FUTURE

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

ORGANIC COTTON

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

ORGANIC COTTON - SUGGESTIONS

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

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