



The Future of the Australian Cotton Industry

Adam Kay

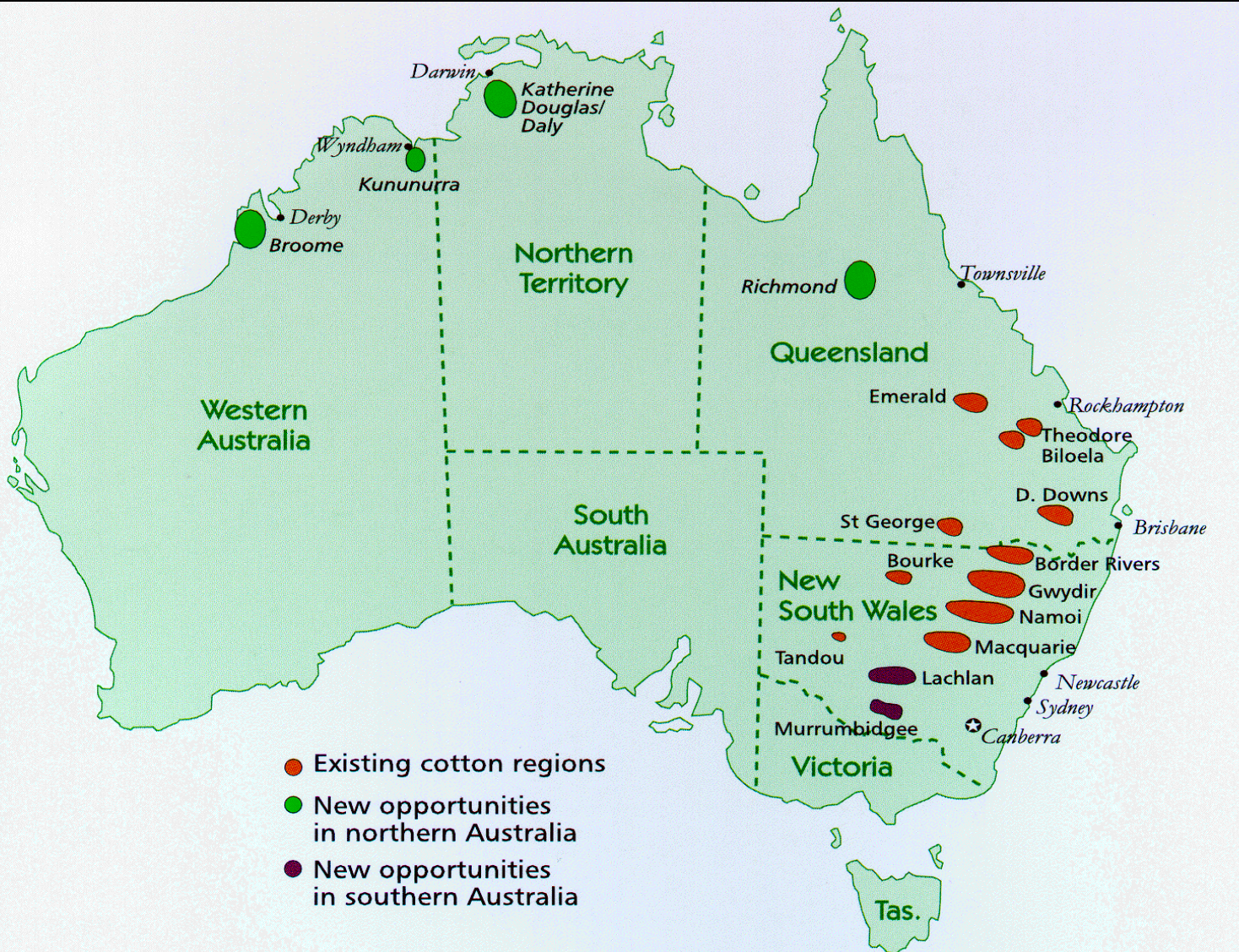
R D Watt Lecture 2018

Summary

- New production areas
- Future R&D and Digital Agriculture
- Best Management Practices (BMP)
- The Future of Textiles
- Meeting Customers Needs



Growth and location of industry



- Southern expansion
- Northern Australia
- Rain grown

Growth – Southern NSW



Growth – Northern Australia

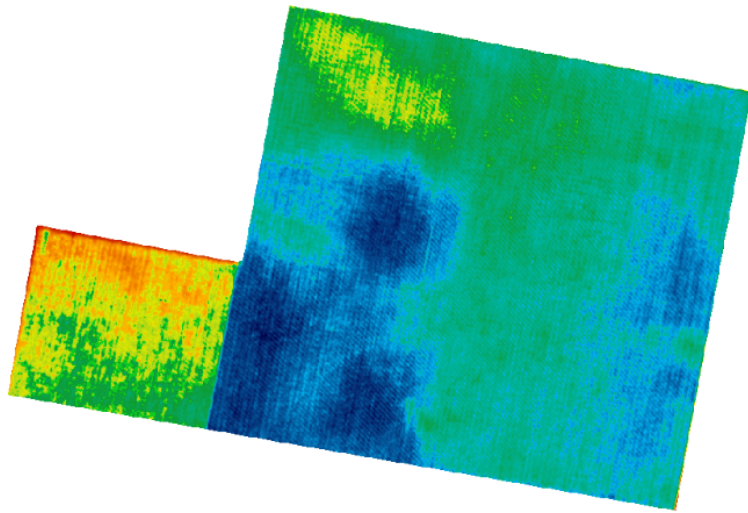


Growth – Rain Grown



Future R&D and Digital Agriculture

- R&D will continue to remain critical to the industry
- Lots of digital agriculture in use currently
- On the cusp of a digital ag revolution



Precision Technology + Robotics



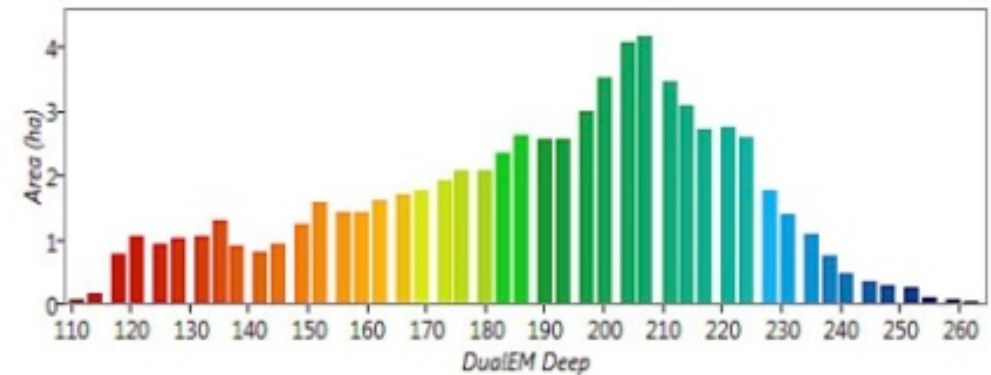
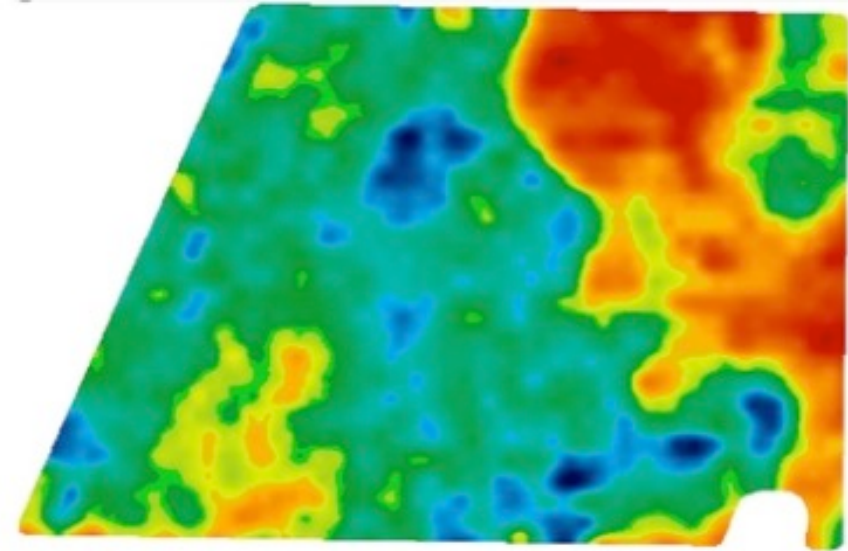
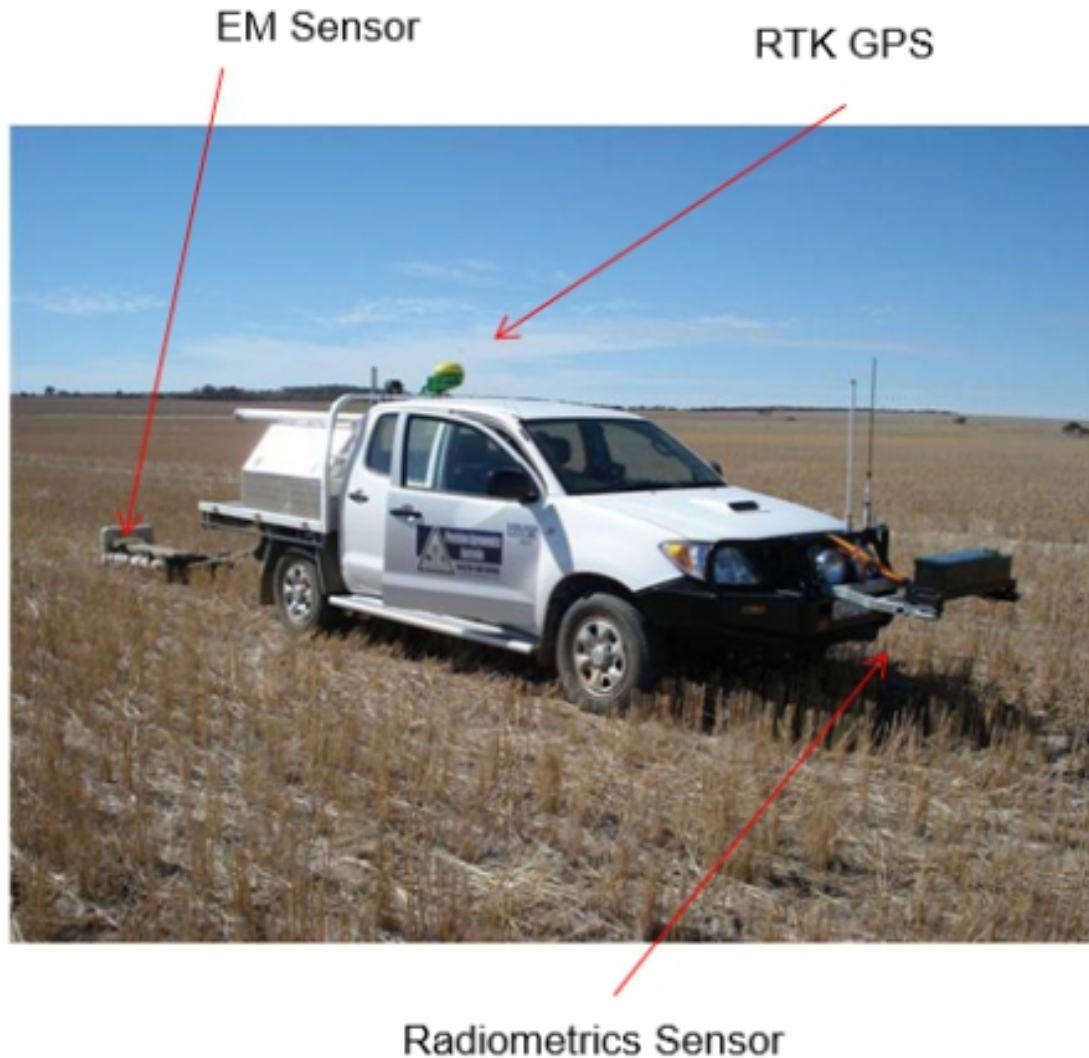
Camera spray



Yield and Fibre Quality Map Data



GPS Soil Surveys And Layering Data



Soil Moisture Data



Canopy Temperature Sensors Data



Drone Data



Bringing all the data together

Drone Data

Soil Data

Canopy Temperature

Soil Moisture

Yield Map

Fibre Quality Data

Met (Bureau) Data

**Better on farm
decisions**



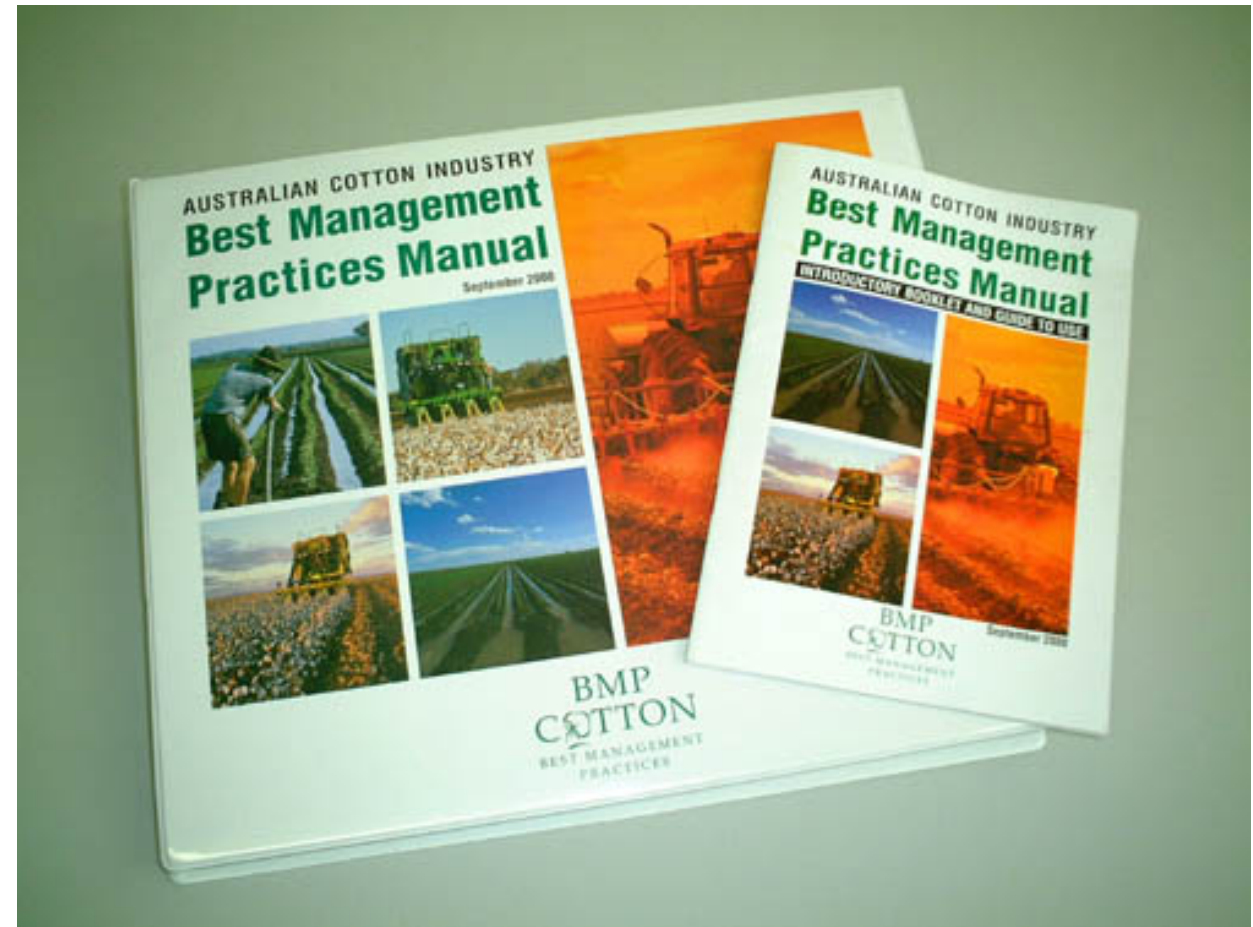
Best Management Practices (myBMP)

- Initiated 21 years ago
- Voluntary
- Grower-led
- On Farm
Environmental
Management System

my **BMP**

Why myBMP?

- Pesticide issues 20 years ago
- All of industry environmental audits
- Research in central location
- Started with pesticide modules



Energy &
Input Efficiency

Fibre Quality

HR & WHS

Biosecurity

Natural Assets

Classing

my **BMP**
A whole of business
approach

IPM
Insects, weeds
& diseases

Ginning

Pesticide
Management

Water
Management

Petrochemicals

Soil Health

Independent Auditing

- Independent assessment of growers practices conducted by trained environmental auditor to verify standards

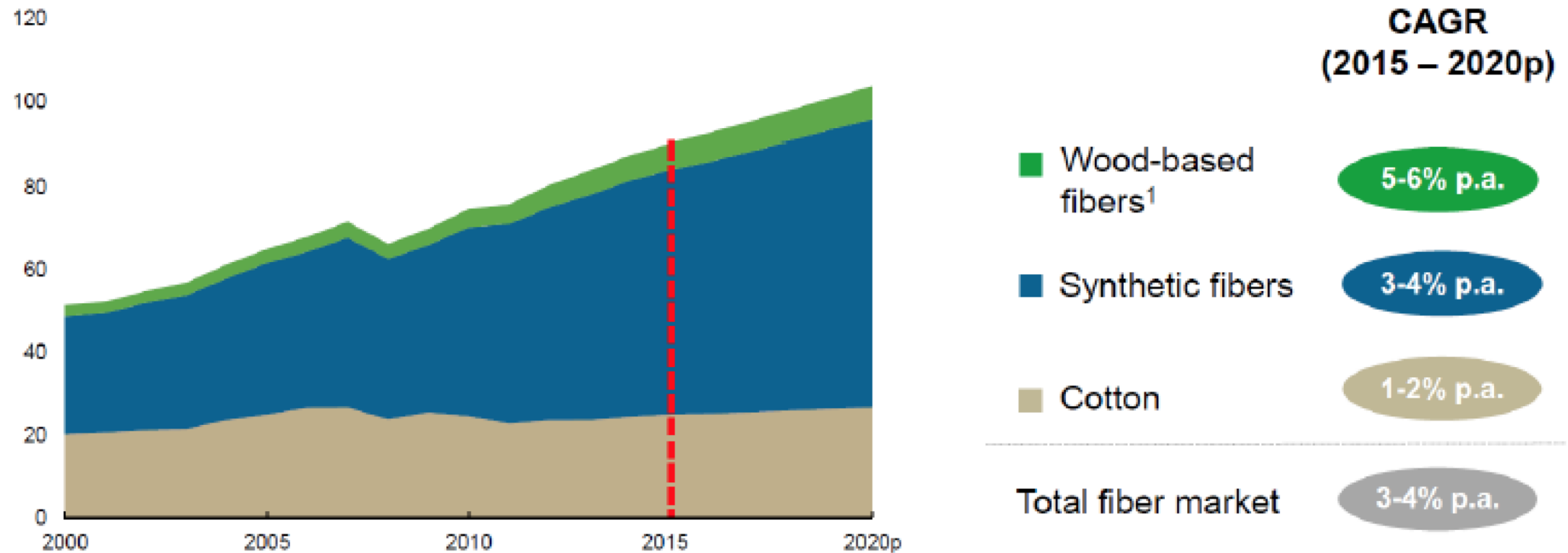




<p><i>my</i> BMP</p> <p>CERTIFIED COTTON FARM</p>	<p><i>my</i> BMP</p> <p>CERTIFIED COTTON FARM</p>	<p><i>my</i> BMP</p> <p>CERTIFIED COTTON FARM</p>
<p>Daisy Lodge</p>	<p>Kulki</p>	<p>Carlisle</p>

The Future of Textiles: A Changing World

Cotton's Declining Market Share



1) Wood-based and cotton linter-based cellulose fibers, previously named man-made cellulose (viscose, modal and lyocell only – excluding acetate, tow and filament)

2) Without wool and other natural fibers

Source: ICAC, CIRFS, Fiber Economics Bureau, National Statistics, The Fiber Year, Lenzing data 2015

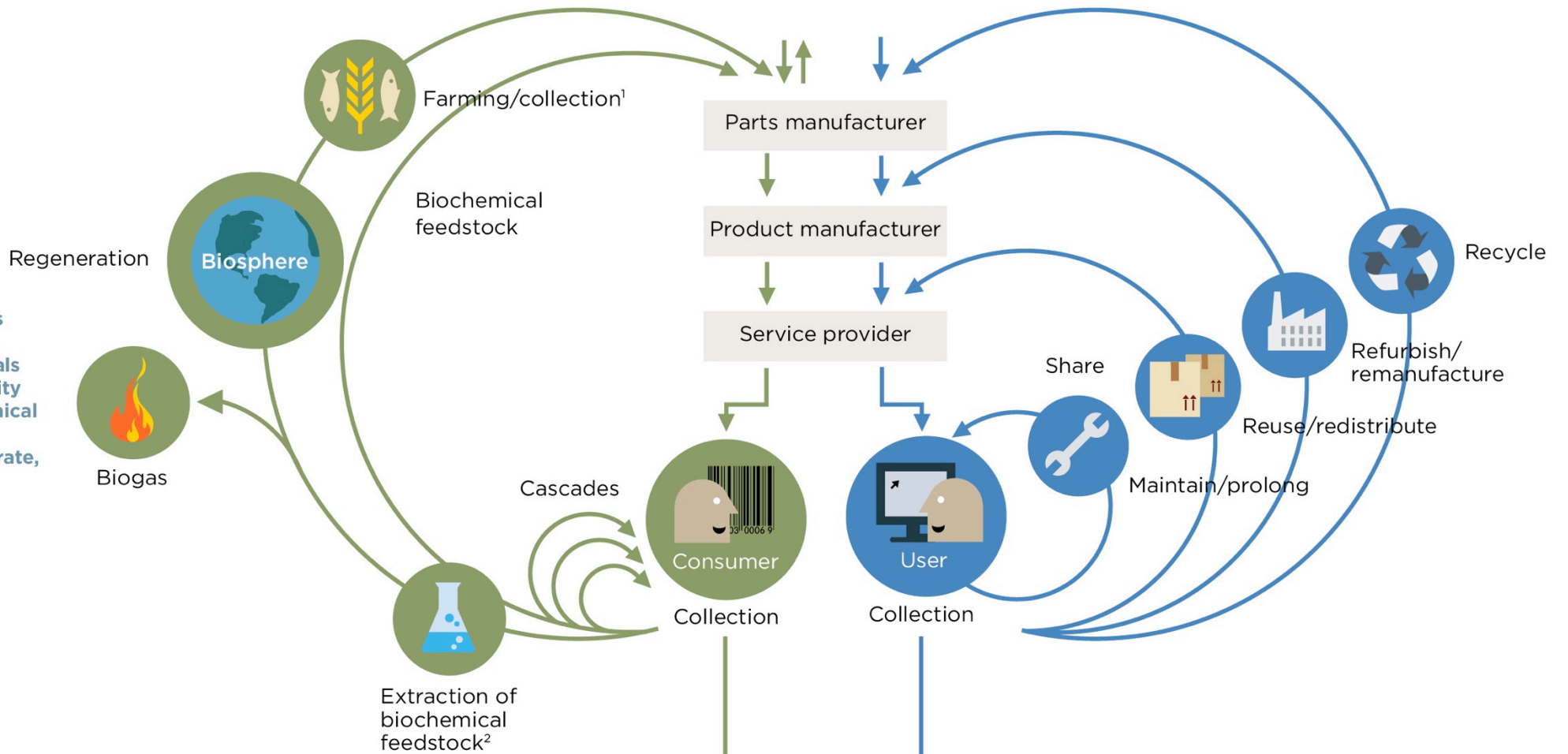
Cotton losing share including in in high-growth,

New Business Models for Fashion

PRINCIPLE

2

Optimise resource yields by circulating products, components and materials in use at the highest utility at all times in both technical and biological cycles
ReSOLVE levels: regenerate, share, optimise, loop



Repair and Re-Use



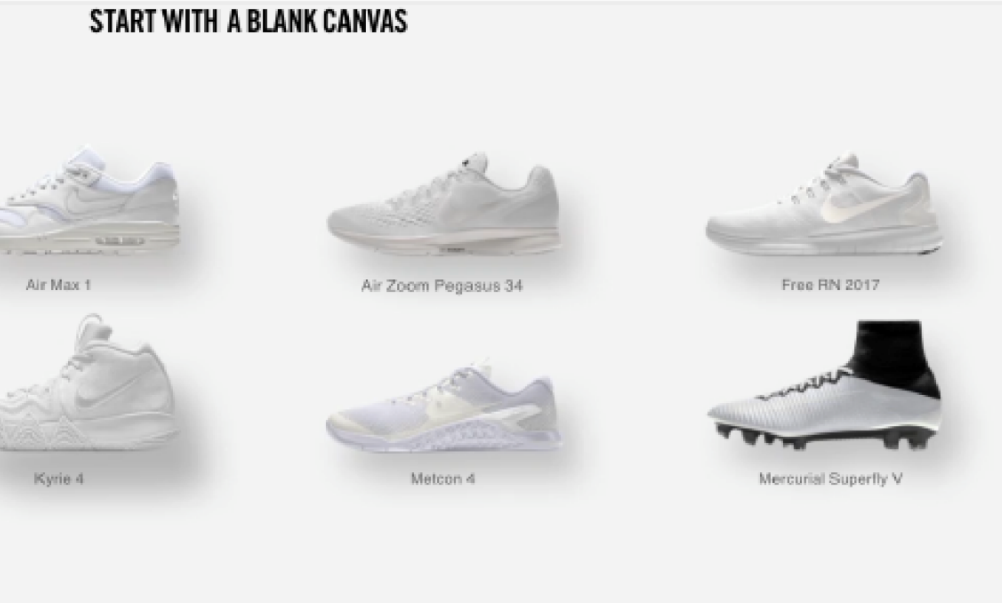
Product Customisation

START WITH A BLANK CANVAS

NIKEiD allows you to design your custom shoe (delivered in 3-5 weeks).

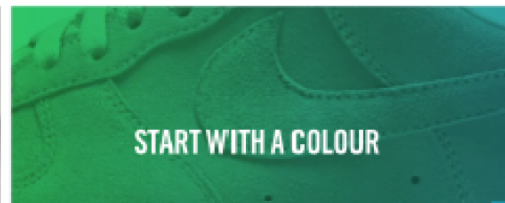
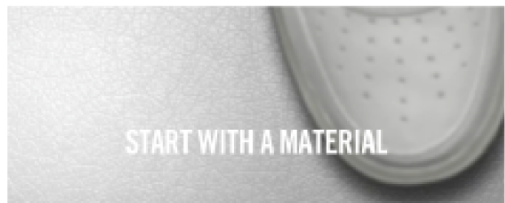
You can start with:

- **A material**
- Colour
- An innovation
- A blank canvas



Air Max 1 Air Zoom Pegasus 34 Free RN 2017

Kyrie 4 Metcon 4 Mercurial Superfly V

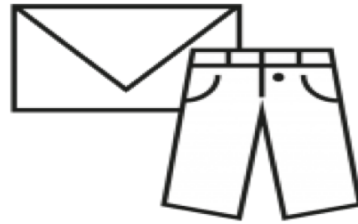


How might (Australian) cotton ensure it is on the menu – and selected by consumers if customised scales in clothing?

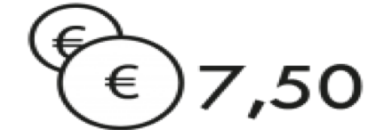
Rent Your Clothes



pay member fee
(1st month, one time)



receive your jeans



monthly fee
(for 12 months)

keep them
still like them?



they're yours now. take them
with you wherever you go

switch them
ready for a new pair?

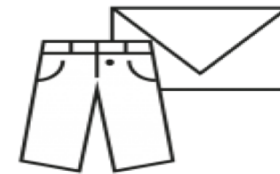


send us your old jeans
and receive the new ones



7,50
monthly fee
(for 12 months)

send back
done wearing?



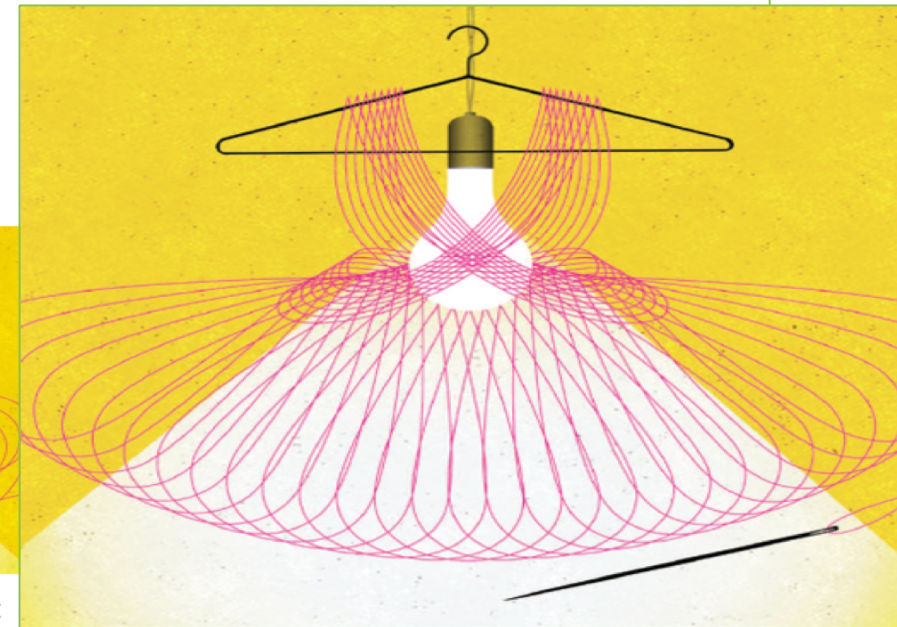
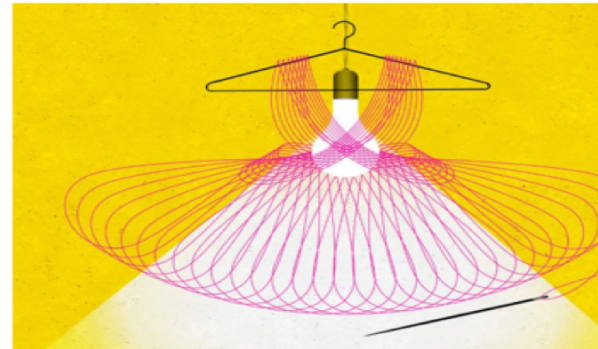
return the jeans and get
a € 10 voucher to use
at any point of time

Transparency and Traceability

More Brands Should Reveal Where Their Clothes are Made

17 Align with Transparency Pledge; Others Should Catch Up

(London) – More apparel and footwear companies should join 17 leading apparel brands that have aligned with an important new transparency pledge, a coalition of unions and human rights and labor rights advocates said in a joint report issued today. The pledge commits companies to publish information that will enable advocates, workers, and consumers to find out where their products are made.



FOLLOW THE THREAD

The Need for Supply Chain Transparency
in the Garment and Footwear Industry

Pressure from NGOs to Change

The screenshot shows a web browser window displaying the RiverBlue website. The browser's address bar shows the URL <http://riverbluethemovie.com/>. The website header features the "RIVERBLUE" logo in a blue, textured font, with the tagline "The story of fashion destroying the rivers of the world" below it. The main visual is a photograph of a man in a white shirt and blue shorts wading through a river filled with trash and flowers. Overlaid on this image is the text "How dirty are your Blue Jeans?" in large white font, and a dark blue button with the text "Contribute to Campaign". On the left side, a dark blue navigation menu lists: Home, About, Videos, Take Action, Contribute, Blog, Pressroom, Gallery, and Contact. On the right side, a "Tweets" widget displays two tweets from @RiverBlueMovie, one dated 2 Aug and another dated 30 Jul. The bottom of the image shows a Windows taskbar with icons for Internet Explorer, Google Chrome, and Microsoft Office, along with a system tray showing the time as 10:13 AM on 4/08/2014.

Browser address bar: <http://riverbluethemovie.com/>

Navigation menu:

- Home
- About
- Videos
- Take Action
- Contribute
- Blog
- Pressroom
- Gallery
- Contact

Website header:

RIVERBLUE

The story of fashion destroying the rivers of the world

Main text:

How dirty are your Blue Jeans?

Call to action button:

Contribute to Campaign

Tweets:

- RiverBlue** @RiverBlueMovie 2 Aug
Thanks Morgana Matus for the interview in @Ecouterre! goo.gl/emXqkV #RiverBlue @EF_Coalition @ethic_clothing @ShopEthica
- RiverBlue** @RiverBlueMovie 30 Jul
Like that 'worn-out' look for
Tweet to @RiverBlueMovie

System tray: 10:13 AM 4/08/2014



today's fight for tomorrow's freedom

SLAVERY TODAY

WHAT WE DO

WHAT YOU CAN DO

CAMPAIGNS

RESOURCES

**STOP SLAVERY IN THAI FISHING
INDUSTRY**

VICTIM PROTECTION CAMPAIGN

HOME ALONE CAMPAIGN

COTTON CRIMES

- Write to Daewoo

- Cotton Crimes Background



COTTON CAMPAIGN

STOP FORCED AND CHILD LABOUR IN THE COTTON INDUSTRY OF UZBEKISTAN!



END FORCED LABOR IN THE COTTON SECTOR OF UZBEKISTAN

Tweet 129

Like 431

+1 27

Uzbekistan, located in Central Asia, is one of the largest exporters of

BLOG: LATEST UPDATES

- Protest at Daewoo in Seoul Against Forced Labor Profiteering
- Government of Uzbekistan: Release Farmer Alikul Sarymsakov
- Uzbekistan: US Decision Aids

TAKE ACTION

Actions for Governments Companies &

[...]

Read More

Public Sustainable Cotton Commitments



20%
of jeans will
be Better
Cotton by
2015



100%
more
sustainable
cotton by
2015



50%
of cotton
will be
sustainable
by 2020



100%
Sustainable
Cotton in
the group
by 2020



100%
increase in
Sustainable
Cotton by
2018



100%
of cotton
will be
sustainable
by 2020



Better Cotton. Better Clothes. Better World.

With the help of the Better Cotton Initiative, we're committed to getting 100 percent of our cotton from more sustainable sources by 2021. This season alone, we've sourced over 3.8 million pounds of more sustainable cotton that is better for the environment and the people who produce it.

Cotton On Group
hits 4% more
sustainable cotton

FEATURED | 15 JUNE 2017

In 2016, the Cotton On Group set itself the bold goal to use 30% more sustainable cotton in its products by 2019. There are smaller milestones in place to help reach this and the first target – to use 4% Better Cotton

“100 % of all JACK & JONES cotton must come from more sustainable sources in 2020”

IKEA becomes the first major retailer to use 100% cotton from more sustainable sources



By July, 2020, 100% of cotton used in Kmart brand and licensed brand products will be sourced through a more sustainable cotton standard.

What Our Customers Want

- Sustainable, ethically produced fibre
- Superior quality
- Supply chain traceability

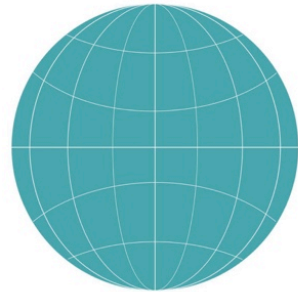
How Do We Deliver?



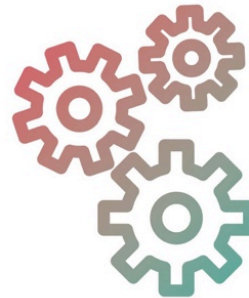
GROWER &
INDUSTRY
ENGAGEMENT



PROMOTE
AUSTRALIAN
COTTON BRAND



GLOBAL
SUSTAINABILITY
INITIATIVES



BRAND
PARTNERSHIPS



SOURCING
ASSISTANCE



INFLUENCE
THE
INFLUENCERS

Be Accountable and Transparent

- Whole of Industry Environmental Audits (every 10 years)
- Sustainability Reporting (every 5 years)
- Set Sustainability Targets (2018)
- Whole of industry Sustainability Strategy (2018)



Align With Global Sustainability Initiatives



Brand & Retailer Members Of BCI

INDITEX

Walmart 

adidas
GROUP

KappAhl

MIGROS



LEVI STRAUSS & CO.



stadium[®]

George.



Sainsbury's


BESTSELLER[®]

stadium[®]

H&M


Tchibo

Hemtex

LINDEX

MQ

gina tricot


AXSTORES

TESCO

YOUR M&S
marksandspencer.com/PlanA

Wackpot

Tell Our Story to Brands and Retailers



Farm Tours for Brands



Think Globally

- Work with other cotton producing countries to lift global standards





Thank you

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