



VISION 2029

**The Australian cotton industry's
shared vision for the future.**

Australian cotton, carefully grown, naturally world's best.

AUSTRALIAN COTTON INDUSTRY FORUM

Association of Australian Cotton Scientists | Australian Cotton Ginners Association | Australian Cotton Planting Seed Association |
Australian Cotton Shippers Association | Cotton Australia (Secretariat) | Cotton Classers Association of Australia |
Cotton Research & Development Corporation | Crop Consultants Australia | Croplife Australia | Wincott

More information: www.crdc.com.au/vision-2029

PROGRESS TOWARDS VISION 2029

Ten years into the implementation of Vision 2029, industry growth is being realised and Australian cotton is well on the way to achieving an industry that is differentiated, responsible, tough, successful, respected, capable and innovative.

Industry organisations, including Cotton Australia, Cotton Research & Development Corporation and Cotton Seed Distributors as well CottonInfo, the industry's joint venture in extension, have aligned their strategic plans with Vision 2029. The Australian Cotton Industry Forum continues to provide leadership in monitoring and reviewing the vision.

Much has changed over the last ten years in the operating environment for Australian agriculture and the cotton industry. Industry leaders, through the Australian Cotton Industry Forum, have reviewed not only our progress but also refreshed the vision to ensure it remains contemporary and fit for purpose. Importantly, everyone involved in Australian cotton has a role to play in achieving Vision 2029.

BACKGROUND

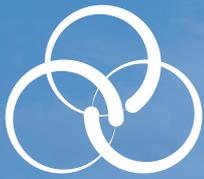
In the years leading up to 2009, the Australian cotton industry experienced particularly difficult environmental, social and political conditions. The Millennium drought was particularly challenging and impacting on the well-being of the industry, communities and people. The 2008 cotton crop of 60,000 planted hectares and 600,000 bales was the smallest in 30 years. The industry as a whole recognised the need to find a way past its current challenges to build a preferred future.

The Vision 2029 project commenced in September 2009 as a collaboration between Cotton Research & Development Corporation, Cotton Australia and the Australian Cotton Industry Council (now the Australian Cotton Industry Forum). Through the development of a shared vision for the future, Australian cotton aimed to improve the industry's long-term performance, organisational cooperation, capacity, profile and prosperity.

To expand the industry's thinking beyond the short-medium term challenges to a strategic focus, a 20-year timeframe was chosen for the shared vision. Every link in the Australian cotton industry chain was addressed including seed and chemical distributors, growers, consultants, researchers, pickers, truckers, ginners, classers, merchants, spinners and brand owners.

In partnership, the industry identified trends and driving forces influencing cotton's future and developed scenarios to explore the possible futures Australian cotton might face: Boom, Bust, Food Replaces Fibre, and Present-Day Projection.

Vision 2029 and six key objectives for Australian cotton's preferred future resulted from this collaboration. In 2019, following a review of the currency of the vision, 'innovative' was added as a seventh objective to reflect its fundamental and increasing strategic importance. The impact of the digital revolution has been explicitly recognised, as has the maturity of cotton as an outward-looking industry that places great importance on understanding and responding to changing consumer and community expectations as the basis for trust and social license.



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Before 2009

Challenges faced by Australian cotton drive a leadership response for a shared industry vision for the future.



2009

Australian cotton industry develop Vision 2029 to inspire and guide actions to deliver the preferred future for the industry in 20 years.



2019

Review of progress made across the Australian cotton industry to achieve Vision 2029 is completed and the vision is refreshed.



2029

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The Australian cotton industry is differentiated, responsible, tough, successful, respected, capable and innovative.

AUSTRALIAN COTTON'S SHARED VISION FOR THE FUTURE

OBJECTIVES

By 2029 the Australian cotton industry will be:



Differentiated – world leading supplier of an elite quality cotton that is highly sought in premium market segments.



Responsible – producer and supplier of the most environmentally and socially responsible cotton on the globe.



Tough – resilient and equipped for future challenges.



Successful – exciting new levels of performance that transform productivity and profitability of every sector of the industry.



Respected – an industry recognised and valued by the wider community for its contribution to fibre and food needs of the world.



Capable – an industry that retains, attracts and develops highly capable people.



Innovative – an industry that continually adapts and progresses through new ideas, processes and impacts.

OWNERSHIP

Vision 2029 is owned by the whole of the Australian cotton industry through the Australian Cotton Industry Forum.

PURPOSE

Vision 2029 outlines Australian cotton's shared aspirations for the future over a 20-year period. Vision 2029 aligns the industry's strategic focus and inspires and unifies Australian cotton to look beyond the immediate context to recognise and be well positioned and prepared for future challenges and opportunities.

Key actions the Australian cotton industry has made towards Vision 2029

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To be the world leading supplier of an elite quality cotton that is highly sought in premium market segments, the industry has:

- Adopted a Cotton-to-Market Strategy led by Cotton Australia
- Raised its global profile through the implementation of programs that promote and encourage responsible and sustainable cotton production in Australia and around the world (including Better Cotton Initiative (BCI), Cotton Leads, *myBMP*)
- Continued to improve fibre quality and invest in potential new higher value uses for Australian cotton and bi-products.



To be the producer and supplier of the most environmentally and socially responsible cotton on the globe, the industry has:

- Strengthened its sustainability credentials through environmental audits and assessments, and the industry's first Australian Grown Cotton Sustainability Report (2014)
- Expanded *myBMP*, the best management practice system for growers to improve on-farm production (new online '*myBMP*' system re-launched in 2010)
- Strengthened participation in *myBMP* with 78 per cent of growers participating
- Through Cotton Australia, commenced a whole-of-industry effort to address spraydrift issues in Australian agriculture and cotton



To be resilient and equipped for future challenges, the industry has:

- Enhanced its understanding of how to best adapt to change and identify critical threats and opportunities for the industry, and strategically target investment and resources (Resilience Assessment of the Australian Cotton Industry at Multiple Scales Report, 2016)
- Continued to work on preparedness for biosecurity, climate change and variability
- Through Cotton Australia, commenced the development of a Cotton Industry Crisis Management Plan.



To deliver exciting new levels of performance that transform productivity and profitability of every sector of the industry, Australian cotton has:

- Increased yields by more than 13 per cent over the decade to 2018
- Sustained the value of cotton as a profitable crop of choice
- Grown the industry significantly, including into new regions (Southern NSW, Victoria and Northern Australia)
- Rapidly adopted new technologies (including Bollgard 3 and round module pickers).



To be recognised and valued by the wider community for its contribution to fibre and food needs of the world, the industry has:

- Increased collaborations on a global level with the International Cotton Advisory Committee (ICAC), BCI, Cotton Leads, the Department of Foreign Affairs and Trade and other forums
- Contributed collaboratively to global improvements in establishing and measuring progress in adoption of responsible practices (SEEP)
- Engaged external stakeholders in establishing sustainability targets for Australian cotton and commenced research to understand and strengthen community trust
- Starting planning to host the 2019 ICAC Meeting in Brisbane with a focus on developing a vision for the future of the global cotton industry.



To be an industry that retains, attracts and develops highly capable people, Australian cotton has:

- Sustained high levels of investment in the talent and capacity of future leaders in the industry
- Committed to growing the global leading research underpinning the world's best cotton (Vision for Cotton RD&E Capability)
- Established CottonInfo, the industry's joint-venture in extension, in 2012
- Established a Cotton Industry Workforce Strategy and attracted grant funding to expand training opportunities.



To be an industry that continually adapts and progresses through new ideas, processes and impacts, Australian cotton has:

- Built and continuously supports a culture of innovation across the industry
- Recognised the digital revolution and the importance of AgTech, and embraced the start-up community as a valuable contributor to advancing the industry
- Through the ACIF, with assistance from CRDC, supported the development of a Cotton Industry Digital Strategy.