



2026 Grower Survey

intuitive
solutions

September 2026

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It is important to note that the responses contained within the CRDC Grower Survey provide a snapshot in time of grower data, but do not tell the full story. The Grower Survey is one of many research projects commissioned by CRDC to gather industry information. The results are not intended to be used in isolation, but rather in consideration of these other projects, such as the Australian cotton industry's Sustainability Framework and associated reporting, the industry's best practice program myBMP, extension program CottonInfo, and the significant program of R&D that is managed by CRDC. In conjunction with these programs, the Grower Survey helps the industry measure practices and inform continuous improvement. The results are as provided by growers and have not been independently verified. For any queries regarding the Grower Survey, please contact CRDC.

The Cotton Research and Development Corporation (CRDC) undertakes an annual survey of cotton growers to gather information about farming practices and growers' views on research, development and extension (RD&E). This information helps inform CRDC about the benefits of the research it invests in and priority areas for future research. Change in industry practice can be quantified by comparing information across the surveys conducted over the past 20 years.

Previous surveys have included a number of core annual questions and then a number of focus areas to investigate specific aspects of the farming system.

In 2017, CRDC undertook a review of the aims, purpose and design for the survey. The 2017 Grower Survey was developed by a working group including CRDC, Cotton Australia and researchers. The 2026 Grower Survey has been refined by the working group with reference to Grower Surveys undertaken between 2017-2025 and CRDC's Monitoring and Evaluation Framework and supplemented by research questions relevant to the seasonal conditions. This survey gathered mid-term assessment of growers' views of CRDC's performance against its Strategic Plan objectives and performance measures.

The 2026 Grower Survey included:

- Baseline information about growers and their farm business including respondents' demographics (region, farm area) and season and farm information (yields, area of cotton).
- A number of other focus areas, including:
 - Water
 - Soil and Nutrition
 - Disease and Pest Management
 - On-Farm Trials
 - Cotton Field History
 - Sustainability and GHG Emissions
 - Technology
 - Leadership, Training and Education
 - Community and Social Contribution
 - Industry Sentiment
- As some questions are specific to cotton growers in the 2025-26 season, these questions will have a slightly lower sample size compared to most other questions. Also, due to the length of the survey, some questions are asked on rotation (to roughly 50% of respondents).

The results from the 2026 Grower Survey now follow. Ahead of this, we provide an explanation to assist readers in understanding and interpreting the results in this report.

How the survey was conducted

The 2026 Grower Survey was conducted using a CATI (Computer Assisted Telephone Interviewing) data collection methodology. This included:

- Growers being contacted and invited to complete the survey over the phone;
- Where this was not possible immediately, an interview appointment time was agreed and the interview completed at the agreed time.

When the survey was conducted

Surveys have usually been conducted in winter, focusing specifically on the preceding crop.

CRDC agreed that to ensure consistency over time, the Grower Survey should be conducted at the same time each year.

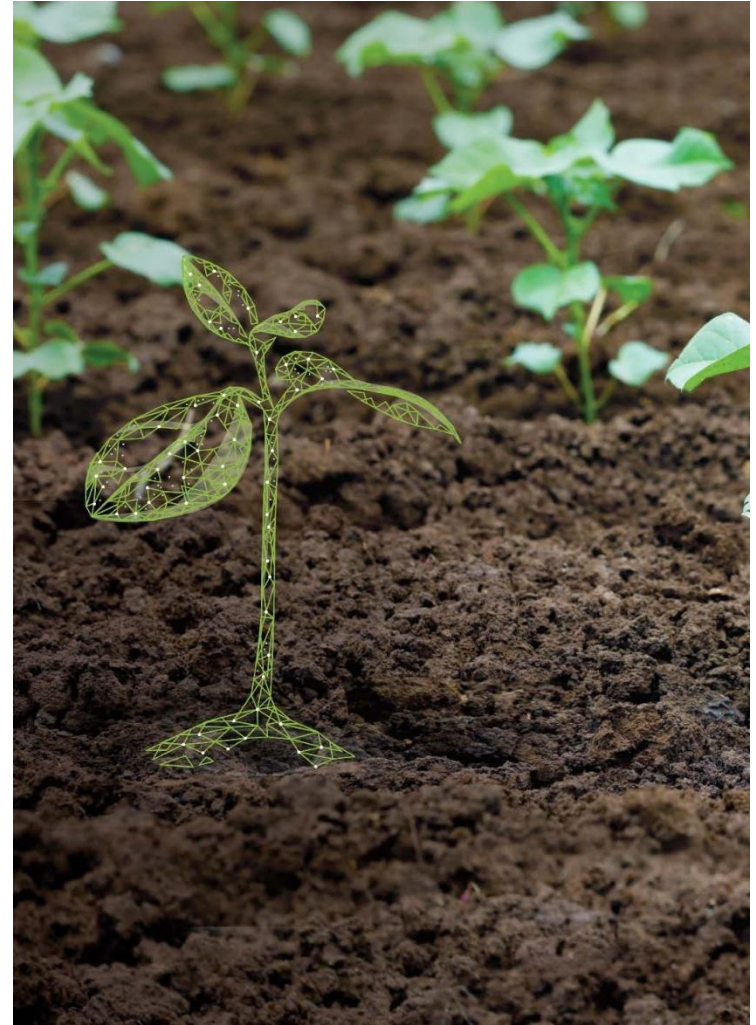
The 2026 Grower Survey opened on 10 June 2026 and ran until 7 July 2026. It is noted that there will be a small number of growers who will have not finished picking at this time.

A look at the 2025-26 season

As at June 2026, the 2025–26 cotton season is drawing to a close. Harvest is still underway, so final results are not yet known. However, early season expectations indicate production of around four million bales, from a smaller crop of approximately 390,000 hectares, down on the previous year.

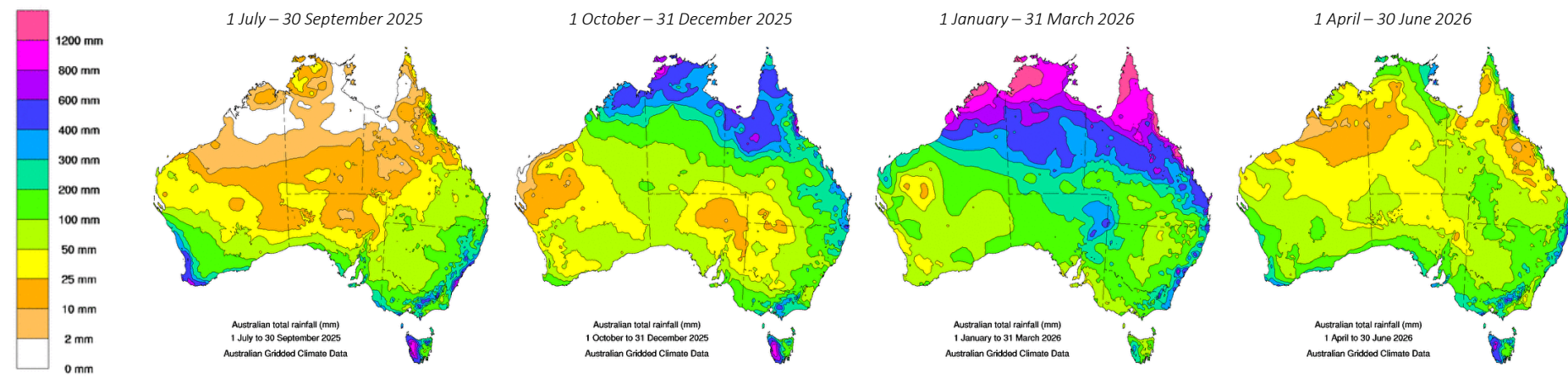
CRDC's investment in 2025-26:

- \$29.004 million – CRDC's expenditure in delivering year three of Clever Cotton on behalf of cotton growers and the Australian Government. Of this, \$23.607 million was directly invested in RD&E projects in collaboration with our research partners.
- 280 – RD&E projects.
- 113 – research partners.
- 3 – pillars: Paddock, People, Planet.

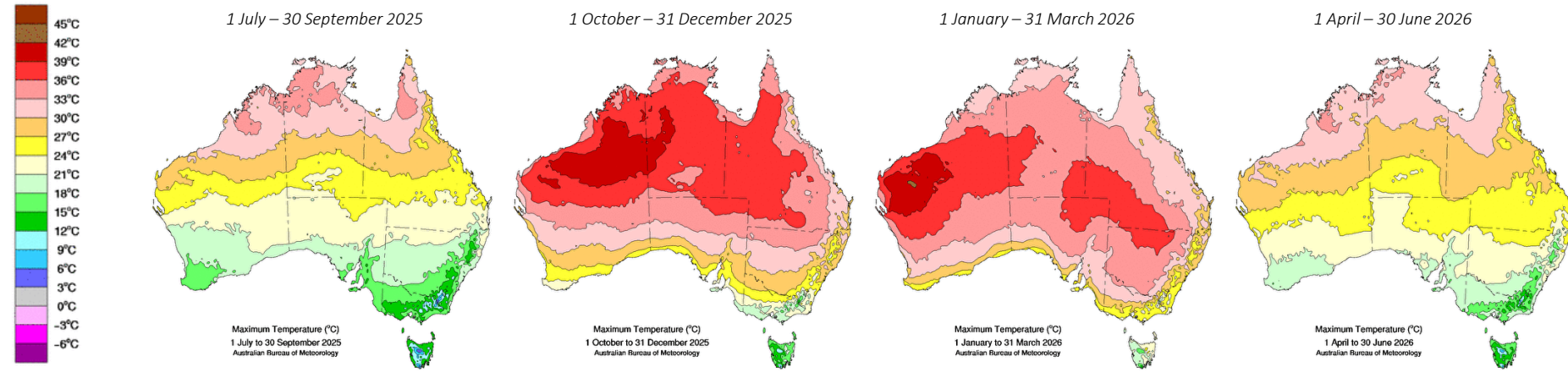


Rainfall and temperature across the 2025-26 season

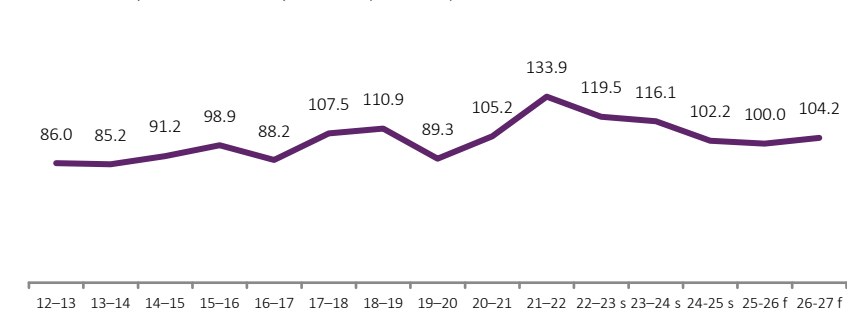
Total rainfall (in mm) by calendar quarter of the 2025-26 season



Mean maximum temperature (in degrees Celsius) by calendar quarter of the 2025-26 season

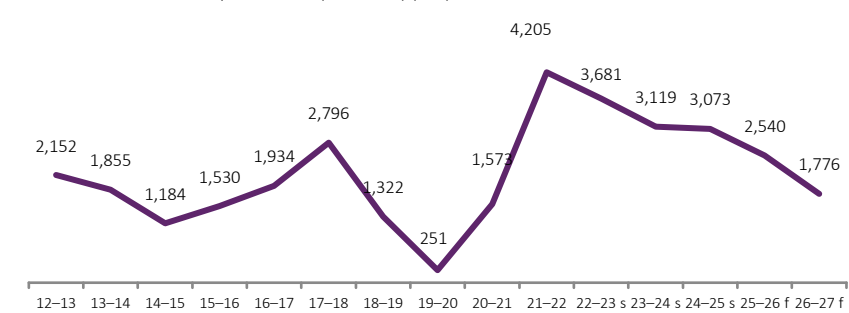


Index of cotton prices received by farmers (Australia)



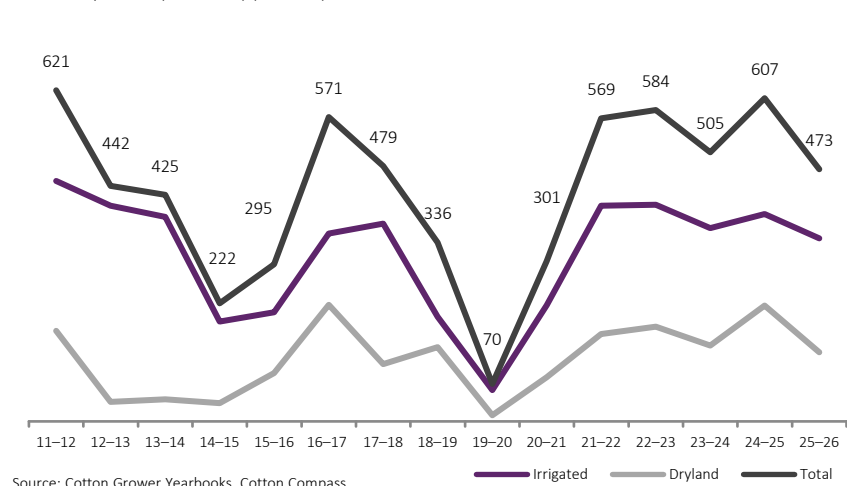
f ABARES forecast. s ABARES estimate.
Notes: The indexes for commodity and price groups are calculated on a chain-weighted basis using Fisher's ideal index with a reference year of 2025-26 = 100. Indexes for most individual commodities are based on annual gross unit value of production. Prices used in these calculations exclude GST. Details for establishments with estimated value of agricultural operations (EVAO) of \$5,000 or more from 1994-95 to 2014-15; and EVAO of \$40,000 or more from 2015-16.
Sources: ABARES; Australian Bureau of Statistics

Gross value of cotton lint production (Australia) (\$m)



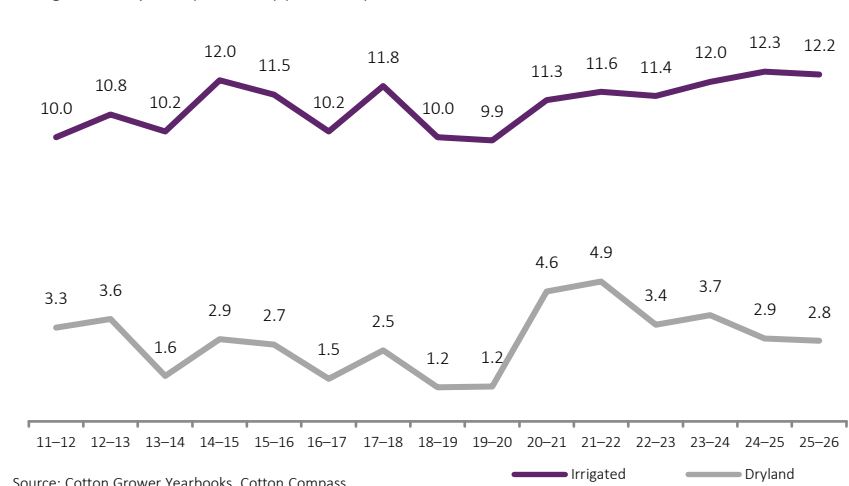
f ABARES forecast. s ABARES estimate. Figures are value delivered to gin
Notes: The gross value of production is the value placed on recorded production at the wholesale prices realised in the marketplace. The point of measurement can vary between commodities. Generally the marketplace is the metropolitan market in each state and territory. However, where commodities are consumed locally or where they become raw material for a secondary industry, these points are presumed to be the marketplace. Prices used in these calculations exclude GST. Details for establishments with estimated value of agricultural operations (EVAO) of \$1,500 or more until 1980-81; \$2,500 or more from 1981-82 to 1985-86; EVAO of \$20,000 or more from 1986-87 to 1990-91; EVAO of \$22,500 or more from 1991-92 to 1992-93; EVAO of \$5,000 or more from 1993-94 to 2014-15; and EVAO of over \$40,000 from 2015-16.
Sources: ABARES; Australian Bureau of Statistics; Cotton Australia

Cotton crop areas (Australia) ('000 ha)



Source: Cotton Grower Yearbooks, Cotton Compass

Average cotton yields (Australia) (bales/ha)



Source: Cotton Grower Yearbooks, Cotton Compass

Growers were asked to provide estimates of three yield measures they achieved for the 2025-26 growing season. These were average yield across their entire crop, and the highest and then lowest yield from one field for the same crop.

This provides a sense of the breadth of performance across their farms.

The results provided by growers indicate the variation across fully irrigated, partially irrigated and raingrown/dryland areas.

- For fully irrigated areas, the 2026 survey reported an average yield of 12.05 bales per hectare. This reported result is slightly down on that reported in 2025 (down 0.30).
- For raingrown/dryland areas, the average yield was 3.70, also slightly down to that reported in 2025.
- Results for partially irrigated growers were not reported due to the small sample size.

What were your yields for the 2025-26 cotton growing season across the cotton areas?

Base: All growers who grew cotton during the 2025-26 season; n varies (Fully Irrigated, n = 172, Raingrown/Dryland, n = 60)
Part irrigation not reported due to low sample size.

	Fully Irrigated (bales per ha)	Raingrown/Dryland (bales per ha)
Average yield	12.05 2025: 12.35	3.70 2025: 4.05
Yield achieved by your highest-yielding field (average of grower-reported yield)	13.79 2025: 14.11	4.44 2025: 4.76
Yield achieved by your lowest-yielding field (average of grower-reported yield)	10.14 2025: 10.24	2.77 2025: 3.34
Range of variation from average yield	3.65 2025: 3.87	1.67 2025: 1.41

The results above are results of survey measurements reported at an overall level – covering all regions and farm sizes.

Key results by Region and Size of Total Farm Area (fully irrigated results only)

The commentary to the left provides high-level insights into the results at an overall level, and (where applicable) results across two main segments – Region and Size of Total Farm Area

The base represents the cohort of respondents to the question (e.g. all growers who grew cotton during the 2025-26 season and responded to the survey), and the number that provided an answer to the question (172 growing fully irrigated cotton, 60 growing raingrown/dryland cotton). Growers did not necessarily answer each question – as a result, the base across questions may vary.

The results below are results of survey measurements reported at two key segment levels: Region (six categories) and Size of Total Farm Area (three categories). For example, in Central Queensland 13 respondents answered the question, reporting an average yield of 11.41 bales per hectare across fully irrigated cotton fields.

Key results by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD (n=13)	Darling Downs (n=28)	Macintyre Balonne (n=30)	Northern NSW (n=39)	Macquarie (n=21)	Southern NSW (n=34)	Small (n=53)	Medium (n=78)	Large (n=41)
Average yield	11.41	11.30	13.09	12.93	13.47	10.74	11.23	12.16	12.92
Highest yield from one field	14.27	13.18	15.01	14.57	14.96	11.97	12.80	13.87	14.77
Lowest yield from one field	8.32	8.80	10.96	11.20	11.86	9.25	9.41	10.40	10.48
Range of variation from average yield	5.95	4.39	4.05	3.37	3.11	2.72	3.39	3.47	4.29

Segments were categorised as follows:

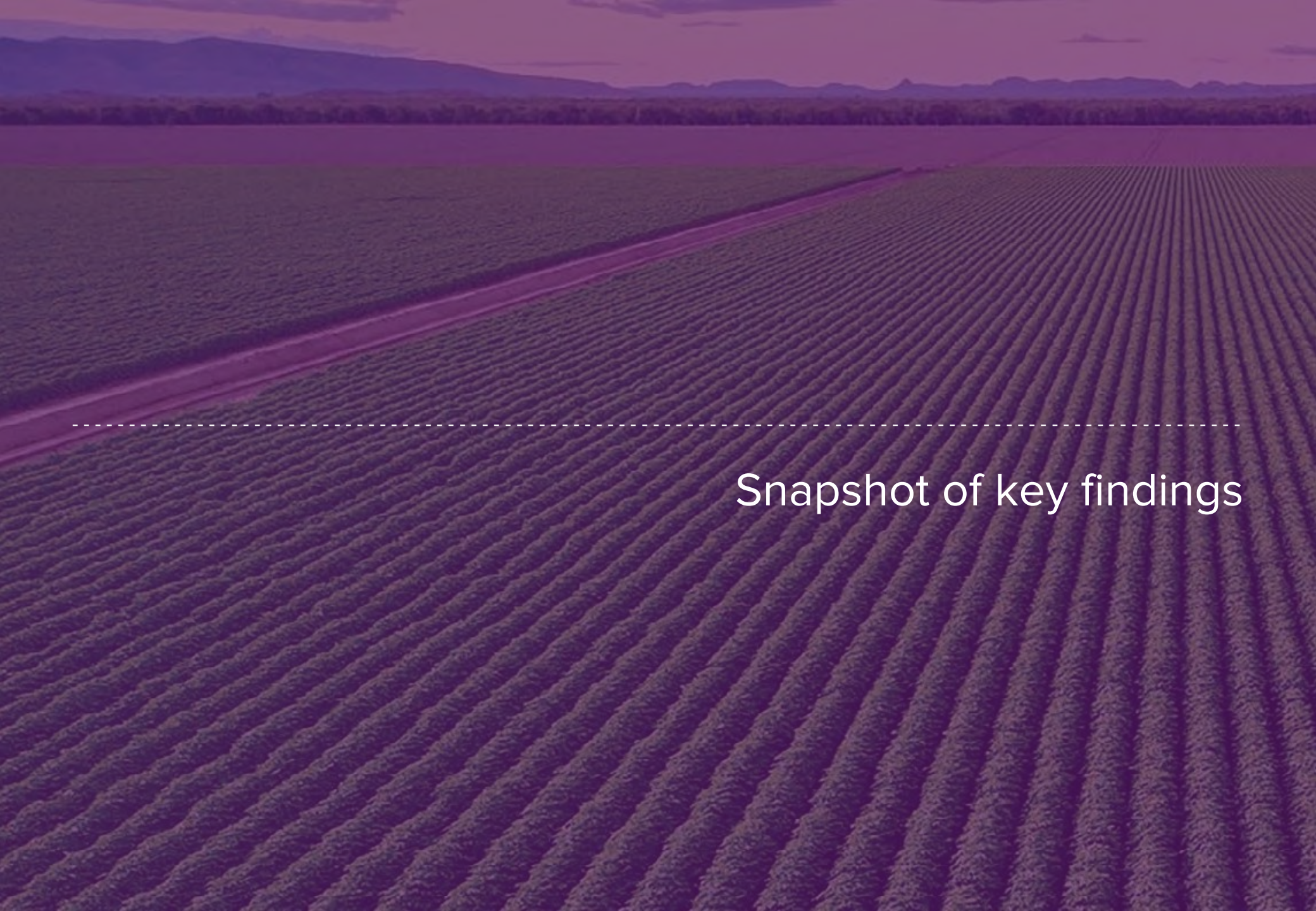
Region (based on Region at Q1)

- Central QLD
- Darling Downs
- Macintyre – Balonne
 - Border Rivers
 - St George/Dirranbandi
- Northern NSW
 - Gwydir
 - Lower/Upper Namoi
 - Bourke

- Macquarie
- Southern NSW
 - Lachlan
 - Murrumbidgee
 - Murray

Size of Total Farm Area (based on cropping area – full irrigation, part irrigation or raingrown/dryland - at Q3)

- Small (< 1,000 ha)
- Medium (1,000 – 5,000 ha)
- Large (> 5,000 ha)

An aerial photograph of a vast agricultural field, likely a cornfield, with rows of crops stretching towards the horizon. A dirt road runs diagonally across the middle of the field. In the background, there are rolling hills or mountains under a clear sky. A horizontal dashed line is positioned above the text.

Snapshot of key findings

2025-26 Cotton Crop



13%

Total farm area under cotton
production in 2025-26

873 ha

Grower-reported average
of hectares under cotton

12.05 bales/ha

Grower-reported average yield
on fully irrigated cotton area

Water



66%

reported using a furrow
(manual siphon) system on
fully irrigated hectares

187.4 mm

In-crop rainfall received between
planting and defoliation in 2025-26

1.32 bales/ML

Median Gross Production Water Use
Index on irrigated cotton area

Soil and Nutrition



28%

Have used enhanced efficiency
fertiliser in the 2025-26 cotton
growing season

53%

Typically targeted an application
of nitrogen between 200-300
kg of N per hectare
(on fully irrigated hectares)

55%

Believed they had some kind
of a soil nutrient deficiency

Australian Cotton Disease Collaboration



59%

Reported being aware of the ACDC before undertaking the survey



90%

Of those aware, almost all rated the ACDC research as relevant



93%

Of those aware, almost all believed a nationally coordinated approach to cotton disease research (like the ACDC) is valuable for the industry

On-Farm Trials



49%

Contributed data to industry R&D (e.g. participation in trials, monitoring activities on-farm, providing on-farm data, etc.)



48%

Held cotton industry research trials and/or private trials on-farm in the 2025-26 cotton growing season



86%

Agree that CRDC and CottonInfo have contributed to improving their productivity and sustainability

Sustainability and GHG Emissions



12%

Have reported measuring their greenhouse gas emissions, with a further 14% planning to



33%

Have made changes to their cotton production system in order to lower their greenhouse gas emissions



64%

Reported that CottonInfo helped them understand how myBMP aligns with the Australian cotton industry sustainability framework, PLANET.PEOPLE.Paddock



FOCUS AREA



Farm Profiles

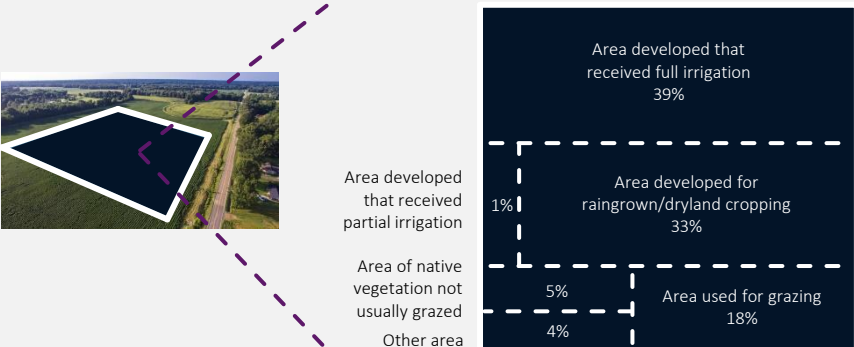
Farm Profiles

Area and distribution of farmland

Based on the information provided by respondents to the 2026 Grower Survey, the survey estimates:

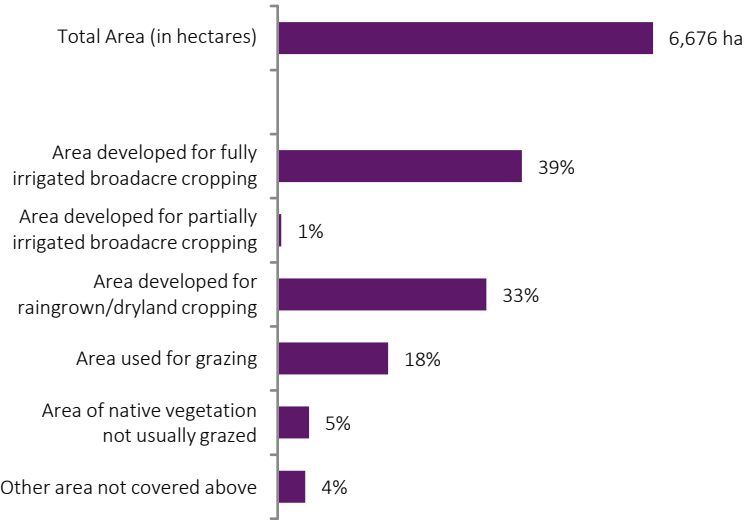
- An average (across all regions and farm sizes) total farm size of 6,676 ha;
- 73% of the land area was developed and available for cropping or other uses including cotton; with
- Growers again this year reporting that the majority of the developed area is either fully irrigated or developed for raingrown/dryland farming; whilst
- 27% of their total farm area remains in use for grazing, native vegetation or other.

The nature of cotton farming obviously varies across the different growing regions and farm sizes as illustrated in the results shown below.



What is the total area of your farm (in hectares), and of the total area of your farm, what is the area attributed to the following?

Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Total area (ha)	2,725	2,436	12,252	7,031	6,410	6,501	1,543	4,478	18,702
Full irrigation	47%	38%	27%	28%	29%	67%	59%	33%	24%
Partial irrigation	1%	<1%	<1%	1%	<1%	<1%	<1%	1%	1%
Raingrown/Dryland	18%	50%	28%	45%	47%	11%	13%	40%	46%
Grazing	22%	7%	31%	17%	17%	13%	17%	17%	19%
Native vegetation	10%	2%	7%	6%	7%	4%	3%	5%	7%
Other	3%	2%	7%	3%	1%	5%	7%	4%	3%

Farm Profiles

Average riparian length and width

The feedback from the 2026 CRDC Grower Survey indicates:

- Just over three in five growers (61%) reported having a riparian area on their property.
- Growers with a riparian area reported an average riparian area of 10.19 km in length, up on the long-term average (since 2017) of 7.47 km.
- The average width of riparian areas is 157 m, slightly down on the long-term average (since 2017) of 165 m.

As reported in previous Grower Surveys, the analysis indicates the size of these riparian areas varies across the different growing regions. Not surprisingly also, there is considerable variation across the different farm sizes. While the trend information provides some useful insights, it should be noted that the grower respondents vary year on year so some caution should be exercised when interpreting these results.

Comparison of reported riparian size across Grower Surveys

	2011 (n=183)	2014 (n=110)	2017 (n=157)	2018 (n=142)	2019 (n=130)	2020 (n=137)	2021 (n=158)	2022 (n=121)	2023 (n = 146)	2026 (n = 132)
Average length (km)	9	7.5	7.65	6.31	7.58	6.93	8.20	7.31	8.32	10.19
Average width (m)	Not asked	Not asked	175	169	144	138	178	186	166	157

Approximately how long and wide is the riparian area on your property?
Base: All growers with a riparian area on their farm*; n = 132 (n = 1 could not provide an answer)



Average length
(in kilometres)

10.19 km



Average width
(in metres)

157 m

83 of 215 growers who answered
(39%) reported no riparian area on
their property.

Key results by Region and Size of Total Farm Area

	Central QLD (n=10)	Darling Downs (n=22)	Macintyre Balonne (n=25)	Northern NSW (n=45)	Macquarie (n=13)	Southern NSW (n=13)	Small (n=26)	Medium (n=71)	Large (n=35)
Average length (km)	9.14	5.04	8.46	11.70	9.31	20.17	4.10	8.68	17.94
Average width (m)	94	142	145	143	235	254	122	144	214

* Results were considered outliers and were removed if reported length was 100km or more (n = 2), or reported width was 1,000m or more (n = 6).



FOCUS AREA

2025-26 Cotton Crop

2025-26 Cotton Crop

Cotton area and farming systems

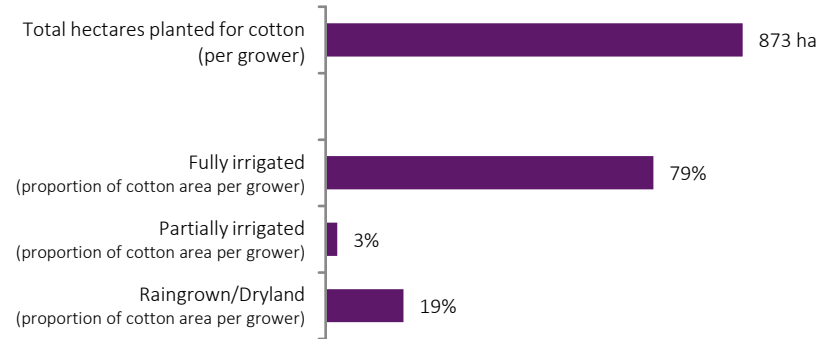
Key information about the growers’ area planted for the 2025-26 season was collected during the survey. Based on the feedback provided by cotton growers responding to the 2026 CRDC Grower Survey, we note that:

It has been estimated that the average area of cotton planted was 873 ha:

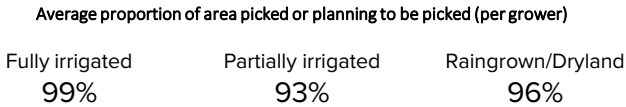
- On average, 79% of cotton area per grower was fully irrigated;
- 3% was partially irrigated; and
- 19% was raingrown/dryland.

Based on the feedback provided by growers, it is estimated that just over three in four (77%) were growing cotton on a single irrigation type, with the majority of these (66%) growing cotton only on fully irrigated hectares.

What was the total number of hectares planted for cotton during the 2025-26 cotton growing season? And of these hectares, how many hectares were fully irrigated, partially irrigated or raingrown/dryland? Base: All growers who grew cotton during the 2025-26 season; n = 200



And of these hectares, how many hectares were picked or are planning to be picked (e.g. not ploughed in due to flooding, spray drift, hail etc.)? Base: All growers who grew cotton during the 2025-26 season; n = 200



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Total area (ha per grower)	615	499	1,200	1,215	779	621	210	641	2,216
Fully irrigated	81%	69%	90%	58%	91%	99%	88%	72%	80%
Partially irrigated	13%	<1%	1%	4%	4%	1%	1%	4%	4%
Raingrown/Dryland	7%	31%	9%	39%	4%	0%	11%	24%	16%

2025-26 Cotton Crop

Yields for the 2025-26 cotton growing season

Growers were asked to provide estimates of three yield measures they achieved for the 2025-26 growing season. These were average yield across their entire crop, and the highest and then lowest yield from one field for the same crop.

This provides a sense of the breadth of performance across their farms.

The results provided by growers indicate the variation across fully irrigated, partially irrigated and raingrown/dryland areas.

- For fully irrigated areas, the 2026 survey reported an average yield of 12.05 bales per hectare. This reported result is slightly down on that reported in 2025 (down 0.30).
- For raingrown/dryland areas, the average yield was 3.70, also slightly down to that reported in 2025 and reflects the seasonal conditions experienced.
- Results for partially irrigated growers were not reported due to the small sample size.

Average yield change by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD	Darling Downs	Macintyre Balonne	Northern NSW	Macquarie	Southern NSW	Small	Medium	Large
Average yield (2025-26)	11.41	11.30	13.09	12.93	13.47	10.74	11.23	12.16	12.92
Average yield (2024-25)	11.47	11.28	12.31	11.98	14.07	13.38	11.89	12.47	12.72
Difference	- 0.06	+ 0.02	+ 0.78	+ 0.95	- 0.60	- 2.64	- 0.66	- 0.31	+ 0.20

What were your yields for the 2025-26 cotton growing season across the cotton areas?

Base: All growers who grew cotton during the 2025-26 season; n varies

(Fully Irrigated, n = 172, Raingrown/Dryland, n = 60)

Part irrigation not reported due to low sample size.

Key results by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD (n=13)	Darling Downs (n=28)	Macintyre Balonne (n=30)	Northern NSW (n=39)	Macquarie (n=21)	Southern NSW (n=34)	Small (n=53)	Medium (n=78)	Large (n=41)
Average yield	11.41	11.30	13.09	12.93	13.47	10.74	11.23	12.16	12.92
Highest yield from one field	14.27	13.18	15.01	14.57	14.96	11.97	12.80	13.87	14.77
Lowest yield from one field	8.32	8.80	10.96	11.20	11.86	9.25	9.41	10.40	10.48
Range of variation from average yield	5.95	4.39	4.05	3.37	3.11	2.72	3.39	3.47	4.29

	Fully Irrigated (bales per ha)	Raingrown/Dryland (bales per ha)
Average yield	12.05 2025: 12.35	3.70 2025: 4.05
Yield achieved by your highest-yielding field (average of grower-reported yield)	13.79 2025: 14.11	4.44 2025: 4.76
Yield achieved by your lowest-yielding field (average of grower-reported yield)	10.14 2025: 10.24	2.77 2025: 3.34
Range of variation from average yield	3.65 2025: 3.87	1.67 2025: 1.41

2025-26 Cotton Crop

Impact of spray drift on cotton crop

Growers were asked about the impact of spray drift on their cotton crop, both from a yield perspective and from a financial perspective. The feedback from growers responding to the 2026 survey suggests that the issue of spray drift was generally low this season:

- Just under one in ten growers (8%) reported being affected by spray drift during the 2025-26 cotton growing season.
- This result represents a substantial decline on impacted growers compared to the 48% result reported in 2023.

Of the 8% of growers who reported being impacted, these growers reported that, on average, 25% of their cotton crop area had been impacted. This result is also a significant decline on the 2023 result (48%).

Growers who could provide an estimate (both some impact or no impact) reported the following:

- An average yield cost impact of 0.7 bales/ha (down from 1.2 bales/ha in 2023);
- An average financial cost of around \$20k (down from \$254k in 2023); and therefore
- An average cost per hectare of \$608 per hectare (down slightly from \$783 per hectare in 2023).

For the 2025-26 cotton growing season, what area of your cotton crop was impacted by spray drift (if any), and what do you estimate to be the average yield cost and the total financial cost of this damage?
Base: All growers who grew cotton during the 2025-26 season; n = 200

Of the 8% of cotton growers affected. . .	% of cotton growers affected	8% 2023: 48%
	Average reported % of cotton crop area impacted	25% 2023: 48%
	Average reported yield cost (in bales/ha)	0.7 2023: 1.2
	Average reported financial cost (in \$)	\$20k 2023: \$254k
	Average reported cost per hectare (in \$/ha)	\$608 2023: \$783
Range of the reported financial cost (in \$)		
\$0 - \$120k		
Range of the reported cost per hectare (in \$/ha)		
\$0 - \$4.9k		

Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
% of cotton growers affected	7%	0%	19%	9%	9%	0%	4%	5%	18%
Average % of cotton crop area impacted	100%	0%	25%	25%	1%	0%	100%	6%	18%
Average yield cost (in bales/ha)	0.0	0.0	0.8	0.8	0.0	0.0	0.5	0.8	0.7
Average financial cost (in \$)	\$0	\$0	\$20k	\$34k	\$1k	\$0	\$35k	\$36k	\$1k
	Central QLD	Darling Downs	Macintyre Balonne	Northern NSW	Macquarie	Southern NSW	Small	Medium	Large
% of cotton growers affected (2025-26)	7%	0%	19%	9%	9%	0%	4%	5%	18%
% of cotton growers affected (2022-23)	18%	47%	61%	58%	69%	39%	25%	57%	61%
Difference	- 11%	- 47%	- 42%	- 49%	- 60%	- 39%	- 21%	- 52%	- 43%



FOCUS AREA

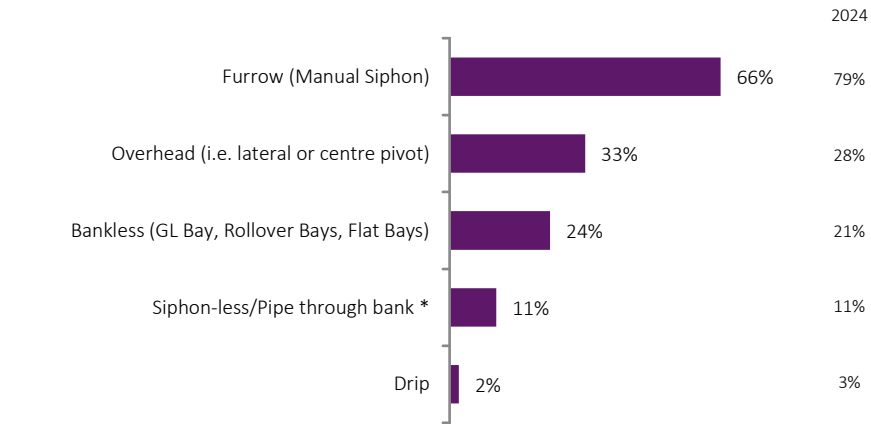


Water

Full irrigation systems in use and in-crop rainfall

Proportion of growers who reported using each system for growing cotton during the 2025-26 season
Base: All growers who grew cotton during the 2025-26 season on **fully irrigated** hectares; n = 176

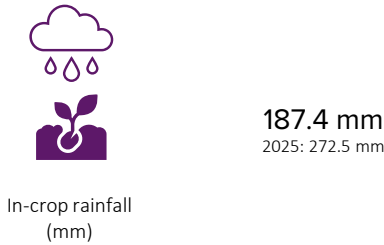
Key results by Region and Size of Total Farm Area



	Central QLD (n=13)	Darling Downs (n=28)	Macintyre Balonne (n=31)	Northern NSW (n=40)	Macquarie (n=22)	Southern NSW (n=35)	Small (n=53)	Medium (n=81)	Large (n=42)
Furrow	92%	79%	61%	80%	64%	31%	68%	69%	57%
Overhead	54%	50%	26%	28%	32%	29%	30%	32%	38%
Bankless	15%	4%	35%	10%	23%	54%	25%	27%	19%
Siphon-less/Pipe through bank	8%	7%	23%	10%	14%	9%	2%	6%	33%
Drip	0%	14%	0%	0%	0%	0%	8%	0%	0%

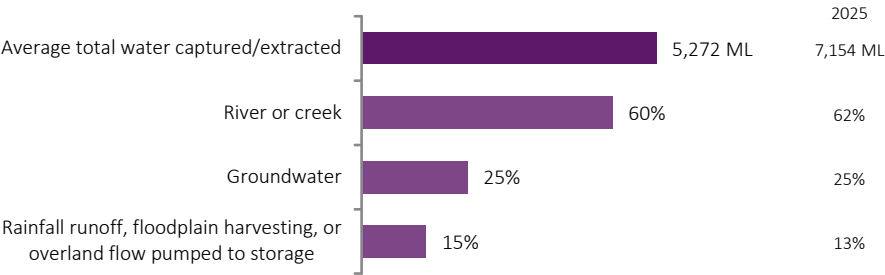
How much in-crop rainfall (in mm) did you receive in the 2025-26 cotton growing season between planting and defoliation?

Base: All growers who grew cotton during the 2025-26 season and could provide a response; n = 169



	Central QLD (n=13)	Darling Downs (n=26)	Macintyre Balonne (n=28)	Northern NSW (n=41)	Macquarie (n=22)	Southern NSW (n=32)	Small (n=50)	Medium (n=78)	Large (n=41)
In-crop rainfall (mm)	446.4	258.2	138.6	148.1	80.9	83.2	229.1	164.3	180.3

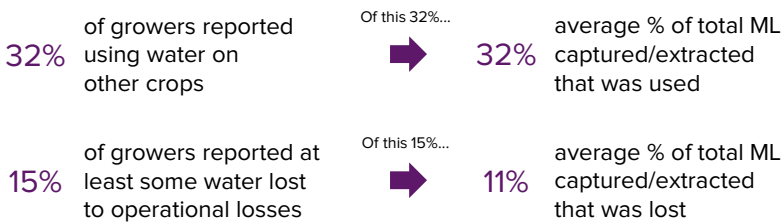
For the 2025-26 cotton growing season, how much water (in megalitres) was captured or extracted from?
Base: All growers who grew cotton during the 2025-26 season and captured/extracted water; n = 158 *



Key results by Region and Size of Total Farm Area

	Central QLD (n=12)	Darling Downs (n=26)	Macintyre Balonne (n=27)	Northern NSW (n=37)	Macquarie (n=22)	Southern NSW (n=30)	Small (n=48)	Medium (n=74)	Large (n=36)
Total water captured/extracted	5,920	1,499	5,375	5,617	5,520	7,592	1,179	3,694	13,973
River or creek	50%	35%	82%	42%	84%	64%	53%	57%	74%
Rainfall runoff, harvesting, etc.	9%	32%	7%	41%	16%	33%	32%	27%	11%
Groundwater	40%	33%	11%	17%	1%	4%	15%	16%	15%

How much of the water captured or extracted ([total ML from above] megalitres) was used on other crops or lost to operational losses (i.e. blow outs)? †
Base: All growers who grew cotton during the 2025-26 season and captured/extracted water; n = 158 **



	Central QLD (n=12)	Darling Downs (n=26)	Macintyre Balonne (n=27)	Northern NSW (n=37)	Macquarie (n=22)	Southern NSW (n=30)	Small (n=48)	Medium (n=74)	Large (n=36)
% of growers using water on other crops	58%	42%	7%	49%	9%	33%	27%	34%	33%
Of these growers... Average % of total ML used	16%	32%	65%	26%	52%	43%	29%	35%	28%
% of growers reporting at least some water lost	8%	8%	7%	16%	27%	20%	6%	12%	31%
Of these growers... Average % of total ML lost	29%	15%	15%	11%	5%	10%	5%	9%	14%

* For proportion calculations, responses were only considered where figures for all sources were known (n = 0 removed, n = 158 valid for analysis).
** For proportion calculations, responses were only considered where figures for all sources were known (Other crops: n = 2 removed, n = 50 valid for analysis; Operational losses: n = 1 removed, n = 23 valid for analysis).

Water

GPWUI: Gross Production Water Use Index

The GPWUI (Gross Production Water Use Index) is an index to benchmark water productivity. This benchmark relates total production (bales) to the total water input (water from all sources: irrigation, effective rainfall and soil moisture).

The calculation of GPWUI is based off methodology from NSW Department of Primary Industries and utilises several questions from the 2026 CRDC Grower Survey. The results reported are from fully irrigated and partially irrigated cotton crops, only utilise grower responses where all inputs were known at the time of the interview, and reports the average GPWUI result as a median (the middle result for the set of data arranged in ascending order) and not a mean as typically reported.

The results from the 2026 Grower Survey indicate that, across growers who provided answers to all questions used in the GPWUI calculations, the average GPWUI was at 1.32 bales/ML. The table below show the variation of this index across the growing regions (ranging from 1.19 in Southern NSW to 1.54 in Darling Downs).

Gross Production Water Use Index (median of grower results)
Base: All growers who provided answers to all questions used within GPWUI calculations; n = 174

How GPWUI is calculated:

The following calculation is performed for each individual farm and then averaged (median) to provide an overall measure of GPWUI.

Fully irrigated and
partially irrigated farms

1.32
bales/ML

2025: 1.26 bales/ML

Total yield (bales)

divided by

Water held in storages before pumping commenced for 2024-25 season (ML)

Water captured/extracted from sources (ground water, river or creek, rainfall runoff, floodplain harvesting, or overland flow pumped to storage, etc.) (ML)

In-crop rainfall (mm) divided by 100 (to convert to ML/ha) X 76.61% rainfall run-off coefficient X number of cotton ha under full and part irrigation (ML)

Assumption of 0.5 ML/ha of change in soil moisture X number of cotton ha under full and part irrigation (ML)

Water used on other crops or lost to operational losses (ML)

Left-over water in storages at the end of the 2024-25 cotton season (ML)

Key results by Region and Size of Total Farm Area

	Central QLD (n=14)	Darling Downs (n=28)	Macintyre Balonne (n=30)	Northern NSW (n=22)	Macquarie (n=39)	Southern NSW (n=34)	Small (n=53)	Medium (n=81)	Large (n=40)
Median GPWUI (bales/ML)	1.27	1.54	1.32	1.31	1.47	1.19	1.33	1.30	1.33

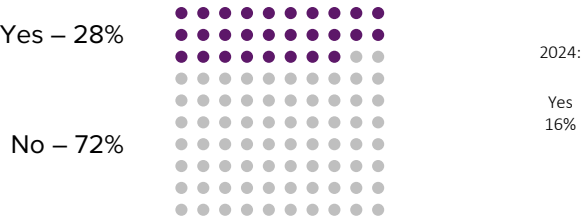
An aerial photograph of a vast agricultural field, likely a cornfield, with rows of crops stretching towards the horizon. A dirt road runs diagonally across the middle of the field. In the background, there are rolling hills or mountains under a clear sky. The entire image is overlaid with a semi-transparent purple filter.

FOCUS AREA

Soil and Nutrition

Have you used enhanced efficiency fertiliser (e.g. controlled or slow-release fertiliser, nitrification inhibitor, urease inhibitor) in the 2025-26 cotton growing season?

Base: All growers who grew cotton during the 2025-26 season; n = 200



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Yes	53%	26%	34%	13%	43%	29%	25%	26%	38%
No	47%	74%	66%	87%	57%	71%	75%	74%	62%

What is your average target applied nitrogen in kgs of N per hectare for your typical irrigated, partially irrigated and/or dryland cotton field/s in 2025-26? *

Base: All growers who grew cotton during the 2025-26 season; n varies
(Fully Irrigated, n = 174, Raingrown/Dryland, n = 61)
Part irrigation not reported due to low sample size.

267.08
kg N per hectare
on fully irrigated cotton fields



96.92
kg N per hectare
on raingrown/dryland cotton fields

Key results by Region and Size of Total Farm Area (fully irrigated results only)

	Central QLD (n=12)	Darling Downs (n=28)	Macintyre Balonne (n=31)	Northern NSW (n=40)	Macquarie (n=22)	Southern NSW (n=34)	Small (n=51)	Medium (n=81)	Large (n=42)
Average target applied nitrogen (in kg N per hectare) for fully irrigated cotton fields	307.08	232.07	288.16	273.23	310.00	224.59	239.59	269.77	295.29

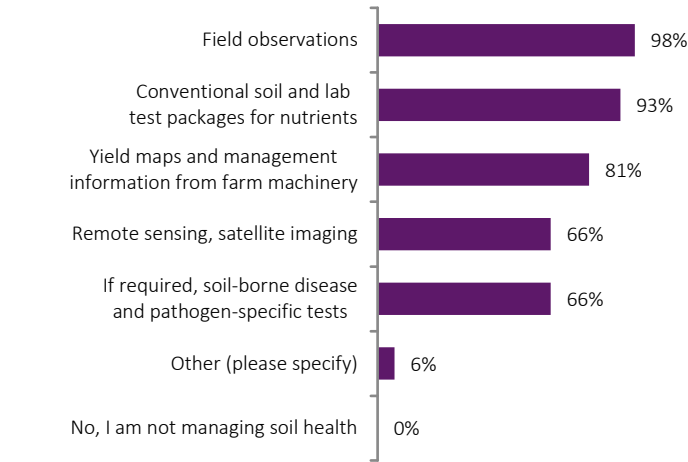
53% (n = 92) reported an applied nitrogen
target between 200-300 kg N per hectare on
fully irrigated cotton fields

* Question is new to the 2026 research.

What sources of information do you, and any advisors, use to understand and manage your soil health?

Please select all that apply. *

Base: All growers (asked via rotation); n = 109 †



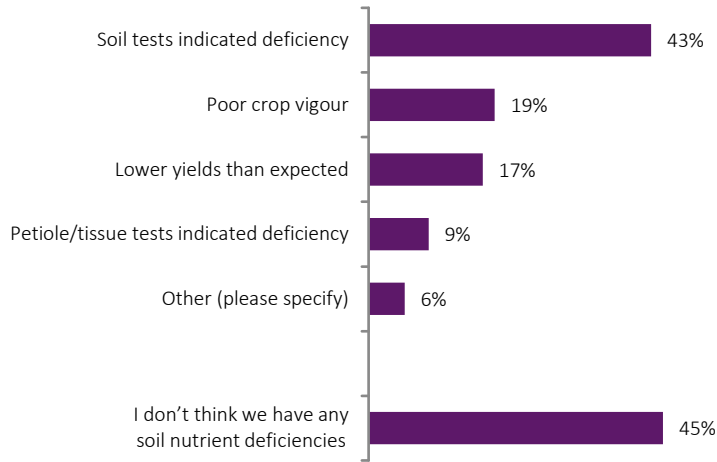
Key results by Region and Size of Total Farm Area

	Central QLD (n=7)	Darling Downs (n=22)	Macintyre Balonne (n=18)	Northern NSW (n=27)	Macquarie (n=11)	Southern NSW (n=16)	Small (n=32)	Medium (n=52)	Large (n=25)
Field observations	100%	100%	94%	100%	100%	100%	94%	100%	100%
Conventional soil and lab test package	86%	95%	94%	93%	100%	94%	84%	96%	96%
Yield maps and management info	71%	73%	78%	93%	91%	81%	59%	88%	92%
Remote sensing, satellite imaging	43%	45%	67%	81%	82%	81%	44%	71%	84%
Soil-borne disease and pathogen tests	57%	36%	72%	81%	64%	81%	47%	71%	80%
Other	0%	9%	6%	4%	9%	6%	9%	8%	0%
No, I am not managing soil health	0%	0%	0%	0%	0%	0%	0%	0%	0%

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Do you think you have any soil nutrient deficiencies? If yes, please tell us why you think this. Please select all that apply. *

Base: All growers (asked via rotation); n = 109 †



Of the 55% or n = 60 who reported at least one reason for their soil nutrient deficiency. . .

What nutrients do you think you are deficient in? *

Base: All growers (asked via rotation) who reported at least one reason for their soil nutrient deficiency; n = 60 †

- 58% - Nitrogen (N)
- 57% - Phosphorus (P)
- 48% - Potassium (K)
- 33% - Zinc (Zn)
- 8% - Sulfur (S)
- 17% - Other (Boron, Calcium, Sodium, etc.)

Results above are a subjective coding of verbatim answers from respondents.

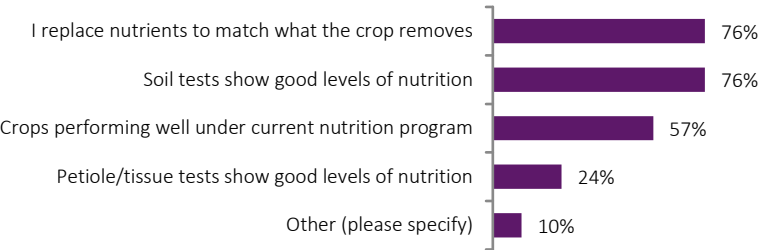
Key results by Region and Size of Total Farm Area

	Central QLD (n=7)	Darling Downs (n=22)	Macintyre Balonne (n=18)	Northern NSW (n=27)	Macquarie (n=11)	Southern NSW (n=16)	Small (n=32)	Medium (n=52)	Large (n=25)
Soil tests indicated deficiency	43%	36%	56%	48%	18%	44%	34%	44%	52%
Poor crop vigour	14%	5%	17%	30%	18%	25%	16%	25%	12%
Lower yields than expected	29%	9%	17%	22%	9%	13%	16%	19%	16%
Petiole/tissue tests indicated deficiency	14%	5%	6%	0%	18%	25%	6%	12%	8%
Other (please specify)	0%	5%	6%	4%	18%	6%	0%	8%	8%
I don't think we have any deficiencies	43%	64%	33%	44%	55%	38%	50%	44%	40%

Of the 45% or n = 49 who reported they do not have any soil nutrient deficiency. . .

Why do you think you do not have any soil nutrient deficiencies? Please select all that apply. *

Base: All growers (asked via rotation) who reported no soil nutrient deficiency; n = 49 †



* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.



FOCUS AREA

Disease and Pest Management

Diseases on-farm during the 2025-26 cotton growing season

Which of the following diseases did you have on-farm during the 2025-26 cotton growing season?
If you had a disease on-farm, please provide your best estimate of the yield loss (in bales per hectare).
Base: All growers who grew cotton during the 2025-26 season; n = 200

	Yes, on farm	Mean estimate of yield loss <i>(of those who could provide an estimate)</i>	Not on farm	Don't know
Verticillium Wilt	29% 2025: 38%	0.70 bales/ha <i>(n = 27)</i>	70%	2%
Black Root Rot	18% 2025: 26%	0.87 bales/ha <i>(n = 19)</i>	82%	0%
Fusarium Wilt	16% 2025: 23%	0.72 bales/ha <i>(n = 6)</i>	83%	2%
Alternaria Leaf Spot	7% 2025: 19%	0.00 bales/ha <i>(n = 4)</i>	92%	1%
Reoccurring Wilt	2% 2025: 6%	0.40 bales/ha <i>(n = 1)</i>	97%	1%
Other	2% 2025: n/a	n/a	95%	3%

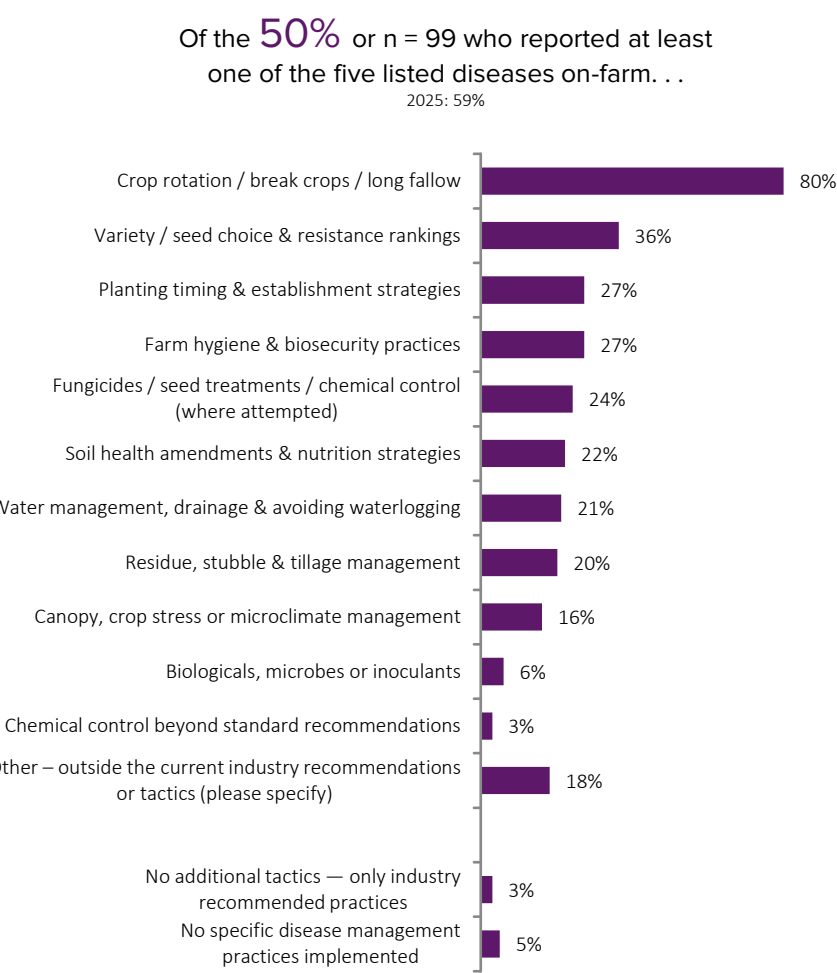
Key results by Region and Size of Total Farm Area (% yes, on farm)

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Verticillium Wilt	7%	12%	41%	53%	26%	14%	16%	30%	42%
Black Root Rot	7%	9%	6%	25%	26%	31%	5%	20%	29%
Fusarium Wilt	13%	15%	22%	19%	9%	11%	9%	13%	29%
Alternaria Leaf Spot	13%	0%	3%	6%	4%	11%	9%	7%	4%
Reoccurring Wilt	7%	0%	0%	2%	4%	3%	4%	1%	2%
Other	7%	0%	0%	0%	4%	0%	2%	2%	2%

Disease and Pest Management

Tactics or approaches used to combat disease

Which of the following tactics or approaches do you use to combat these diseases?
Please select all that apply. *
Base: All growers who reported at least one of the five listed diseases on-farm; n = 99. Please note that the list was not read out to the grower - growers were to state the tactics / approaches they use without prompt.

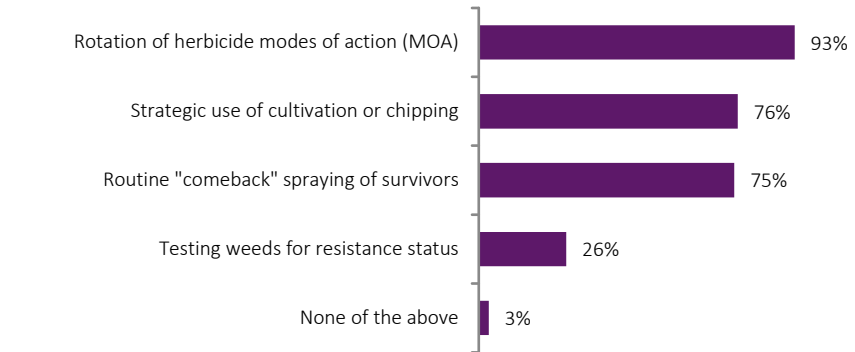


Key results by Region and Size of Total Farm Area (% yes, on farm)

	Central QLD (n=6)	Darling Downs (n=7)	Macintyre Balonne (n=18)	Northern NSW (n=34)	Macquarie (n=11)	Southern NSW (n=18)	Small (n=19)	Medium (n=49)	Large (n=31)
Crop rotation / break crops / long fallow	17%	86%	67%	91%	100%	89%	74%	80%	84%
Variety / seed choice & resistance rankings	33%	29%	39%	29%	55%	50%	16%	43%	39%
Planting timing & establishment...	33%	14%	28%	21%	27%	50%	11%	35%	26%
Farm hygiene & biosecurity practices	33%	29%	22%	26%	36%	33%	5%	39%	23%
Fungicides / seed treatments...	17%	0%	44%	21%	18%	28%	11%	35%	16%
Soil health amendments...	17%	29%	22%	15%	27%	39%	16%	33%	10%
Water management, drainage & avoiding...	17%	0%	22%	18%	27%	39%	11%	29%	16%
Residue, stubble & tillage management	17%	0%	22%	15%	36%	33%	5%	31%	13%
Canopy, crop stress or microclimate...	0%	0%	28%	12%	18%	28%	5%	24%	10%
Biologicals, microbes or inoculants	0%	0%	6%	9%	9%	6%	0%	6%	10%
Chemical control beyond standard	0%	0%	6%	3%	0%	6%	0%	4%	3%
Other – outside the current...	17%	43%	6%	12%	27%	33%	16%	16%	23%
No additional tactics	0%	0%	6%	0%	0%	6%	5%	2%	3%
No specific practices implemented	33%	0%	6%	0%	0%	0%	16%	2%	3%

Which of the following Herbicide Resistance Management Strategy (HRMS) aligned practices did you utilise in your cotton system this season? Please select all that apply. *

Base: All growers who grew cotton during the 2025-26 season (asked via rotation); n = 101 †

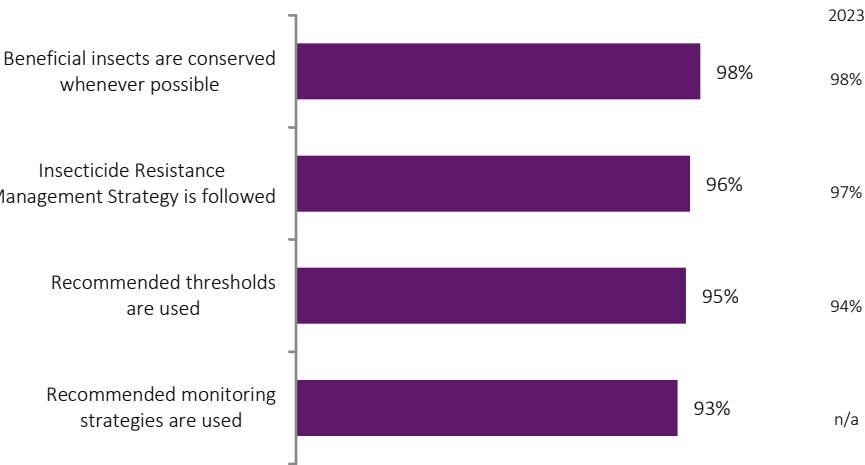


Key results by Region and Size of Total Farm Area

	Central QLD (n=7)	Darling Downs (n=20)	Macintyre Balonne (n=18)	Northern NSW (n=25)	Macquarie (n=11)	Southern NSW (n=14)	Small (n=27)	Medium (n=50)	Large (n=24)
Rotation of herbicide modes of action	86%	90%	89%	100%	100%	86%	89%	92%	100%
Strategic use of cultivation/chipping	86%	80%	83%	64%	91%	71%	63%	76%	92%
Routine "comeback" spraying of survivors	43%	85%	78%	88%	64%	57%	70%	80%	71%
Testing weeds for resistance status	0%	5%	33%	32%	27%	43%	7%	30%	38%
None of the above	14%	0%	0%	0%	0%	14%	4%	4%	0%

With regards to insect pests, disease and weed management in 2025-26 cotton fields, did you use any of the practices listed below? Please select all that apply.

Base: All growers who grew cotton during the 2025-26 season; n = 200



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Beneficial insects are conserved whenever possible	93%	100%	97%	100%	96%	100%	96%	98%	100%
Insecticide Resistance Management Strategy is followed	100%	97%	97%	100%	87%	89%	95%	96%	96%
Recommended thresholds are used	93%	97%	94%	96%	83%	97%	89%	96%	98%
Recommended sampling strategies are used	93%	88%	94%	94%	87%	94%	86%	95%	96%

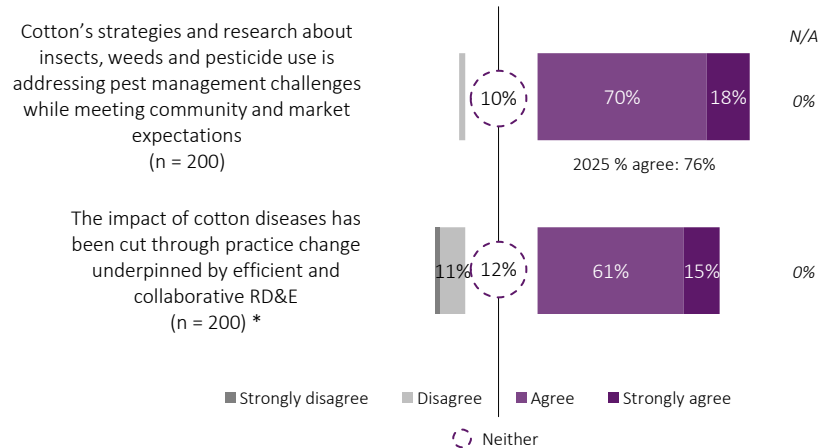
* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Disease and Pest Management

Agreement on statements about IPM

Please tell us whether you agree or disagree with the following statements...

Base: All growers who grew cotton during the 2025-26 season; n = 200



Key results by Region and Size of Total Farm Area (% agree + % strongly agree)

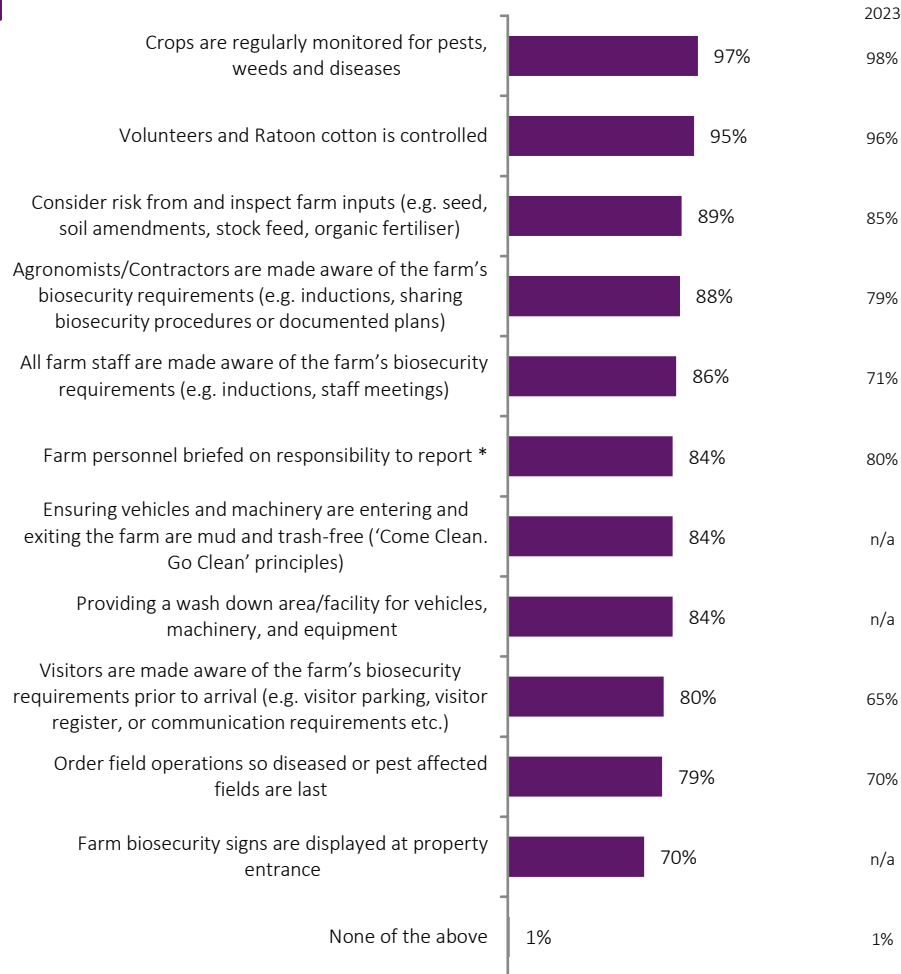
	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Cotton’s strategies and research about insects, weeds and pesticide use is addressing...	67%	82%	81%	66%	70%	86%	74%	81%	67%
The impact of cotton diseases has been cut through practice change underpinned by efficient and collaborative RD&E *	93%	91%	91%	83%	83%	89%	89%	90%	82%

Disease and Pest Management

Farm biosecurity practices

Which of the following practices are implemented to manage your farm's biosecurity?
Please select all that apply.

Base: All growers (asked via rotation); n = 109 †



Key results by Size of Total Farm Area

	Small (n=32)	Medium (n=52)	Large (n=25)
Crops are regularly monitored for pests, weeds and diseases	97%	98%	96%
Volunteers and Ratoon cotton is controlled	88%	98%	100%
Consider risk from and inspect farm inputs	81%	92%	92%
Agronomists / Contractors aware of requirements	75%	90%	100%
All farm staff are made aware of requirements	72%	90%	96%
Farm personnel briefed on reporting responsibility *	84%	87%	80%
Ensuring vehicles and machinery are mud and trash-free	78%	87%	88%
Providing a wash down area/facility for vehicles, etc.	69%	88%	96%
Visitors are made aware of requirements	75%	79%	88%
Order field operations so diseased or pest affected fields are last	72%	83%	80%
Farm biosecurity signs are displayed at property entrance	72%	63%	80%
None of the above	3%	0%	0%

* Full response provided to respondents: "Farm personnel briefed that in event of identifying an unusual disease, pests, or plant there is a responsibility to report to the grower, agronomist, State DPI or Exotic Plant Pest Hotline".\

† Question was asked on rotation to roughly 50% of respondents.

The 2026 study collected feedback from growers about the Australian Cotton Disease Collaboration (ACDC) – a collaborative approach to disease research to reduce the economic impact of current and emerging diseases. Some insights from the questions asked in the 2026 Grower Survey include:

- Almost three in five (59%) of growers surveyed were aware of the ACDC before undertaking the survey.

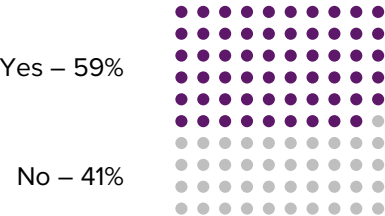
Awareness was slightly more prominent in more northern regions (Central QLD and Darling Downs), and also in larger-sized businesses.

Of those aware of the ACDC:

- 61% have engaged with the ACDC research or researchers in the past two years. The types of engagement were varied – growers could have sought a more active engagement (28% spoke with an ACDC researcher, 23% attended an ACDC event), or more passive (39% read or saw info about the ACDC research e.g. social media, articles or summaries).
- Almost all (90%) rated the relevance of the ACDC research as “Relevant” (42%) or “Very relevant” (48%).
- Three in four (75%) reported that the ACDC contributed to their confidence in understanding or managing disease.
- Almost all (93%) rated the value of a nationally coordinated approach to cotton disease research (like the ACDC) as “Valuable” (26%) or “Very valuable” (67%).

Before this survey, were you aware of the Australian Cotton Disease Collaboration (the ACDC)? *

Base: All growers; n = 216



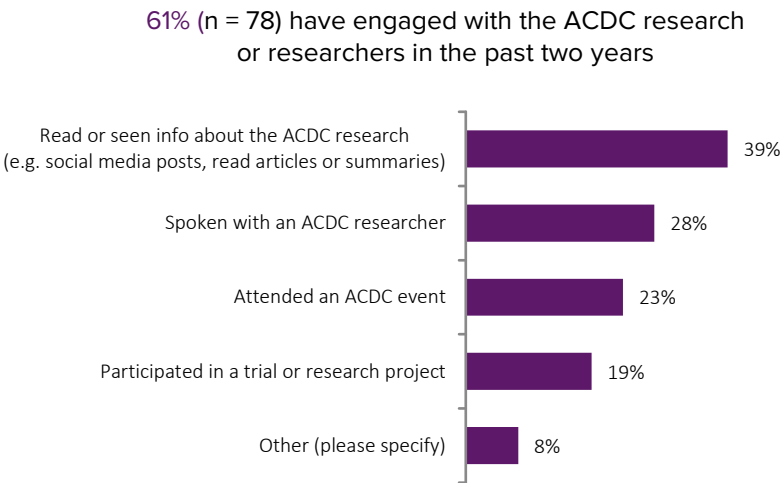
Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Yes	73%	68%	56%	57%	65%	54%	50%	62%	66%
No	27%	32%	44%	43%	35%	46%	50%	38%	34%

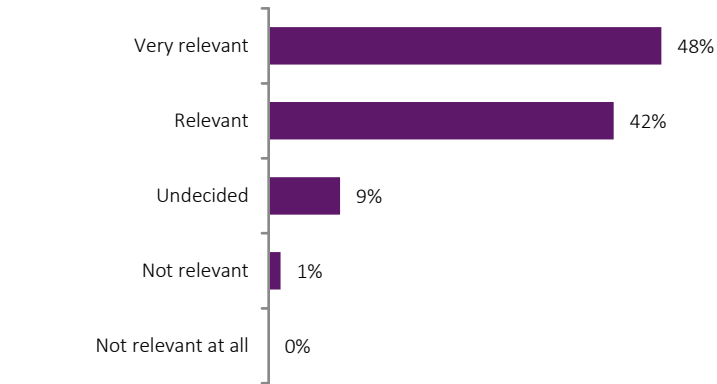


* Question is new to the 2026 research.

In the past two years, have you engaged with any of the ACDC research or researchers?
Please select all that apply. *
Base: All growers aware of ACDC; n = 128



Based on what you've seen so far, how would you rate the relevance of the ACDC research? *
Base: All growers aware of ACDC (asked via rotation); n = 69 †



Key results by Region and Size of Total Farm Area

	Central QLD (n=11)	Darling Downs (n=25)	Macintyre Balonne (n=18)	Northern NSW (n=32)	Macquarie (n=15)	Southern NSW (n=22)	Small (n=33)	Medium (n=64)	Large (n=31)
Have engaged with ACDC in past 2 years	55%	52%	72%	53%	53%	77%	61%	56%	71%
Read/Seen info about the ACDC research	27%	48%	33%	38%	33%	45%	45%	36%	39%
Spoken with an ACDC researcher	27%	8%	33%	28%	33%	36%	33%	23%	32%
Attended an ACDC event	27%	12%	28%	25%	27%	18%	21%	20%	32%
Participated in a trial or research project	9%	0%	28%	19%	27%	23%	12%	17%	29%
Other (please specify)	9%	0%	11%	6%	7%	18%	6%	8%	10%

	Central QLD (n=5)	Darling Downs (n=17)	Macintyre Balonne (n=11)	Northern NSW (n=15)	Macquarie (n=6)	Southern NSW (n=12)	Small (n=18)	Medium (n=35)	Large (n=16)
Very relevant	20%	53%	64%	40%	50%	58%	39%	54%	44%
Relevant	60%	47%	36%	47%	17%	25%	50%	40%	38%
Undecided	20%	0%	0%	13%	33%	8%	11%	6%	13%
Not relevant	0%	0%	0%	0%	0%	8%	0%	0%	6%
Not relevant at all	0%	0%	0%	0%	0%	0%	0%	0%	0%

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Has the ACDC contributed to your confidence in understanding or managing disease? This may include direct involvement (e.g. working with the ACDC researchers or participating in trials) or indirect influence (e.g. industry communications, or increased confidence in disease management decisions). *

Base: All growers aware of ACDC (asked via rotation); n = 69 †



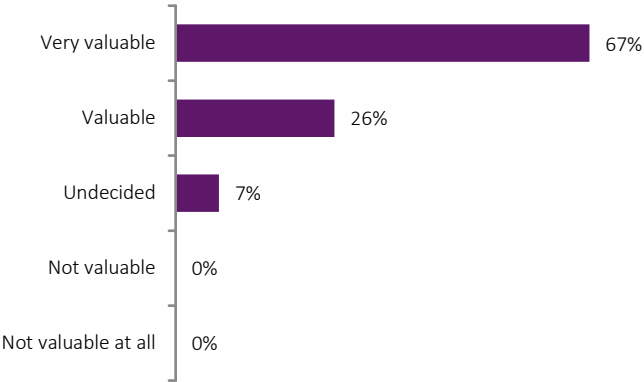
75% (n = 52) reported that the ACDC contributed to their confidence in understanding or managing disease

Key results by Region and Size of Total Farm Area

	Central QLD (n=5)	Darling Downs (n=17)	Macintyre Balonne (n=11)	Northern NSW (n=15)	Macquarie (n=6)	Southern NSW (n=12)	Small (n=18)	Medium (n=35)	Large (n=16)
% reported that the ACDC contributed to their confidence in understanding or managing disease	60%	82%	91%	60%	67%	83%	78%	77%	69%

How valuable do you believe a nationally coordinated approach to cotton disease research (like the ACDC) is for the industry? *

Base: All growers aware of ACDC; n = 128



	Central QLD (n=11)	Darling Downs (n=25)	Macintyre Balonne (n=18)	Northern NSW (n=32)	Macquarie (n=15)	Southern NSW (n=22)	Small (n=33)	Medium (n=64)	Large (n=31)
Very valuable	45%	72%	72%	66%	73%	59%	67%	73%	55%
Valuable	36%	28%	22%	25%	20%	32%	27%	23%	29%
Undecided	18%	0%	6%	9%	7%	9%	6%	3%	16%
Not valuable	0%	0%	0%	0%	0%	0%	0%	0%	0%
Not valuable at all	0%	0%	0%	0%	0%	0%	0%	0%	0%

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.



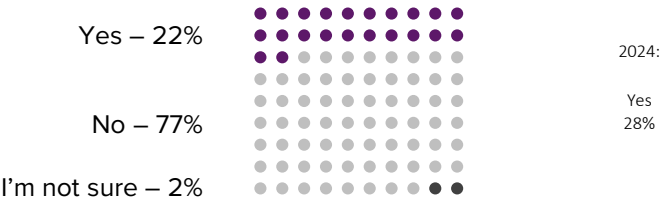
FOCUS AREA

On-Farm Trials

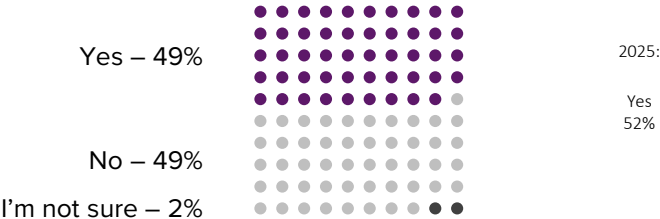
On-Farm Trials

Involvement in cotton RD&E

Have you been involved in a cotton RD&E program during the 2025-26 cotton growing season?
Base: All growers who grew cotton during the 2025-26 season; n = 200

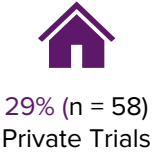
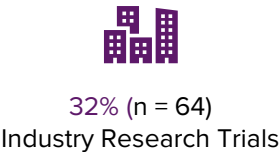


Are you contributing any data to industry R&D (such as through participation in trials or monitoring activities on farm or providing on-farm data or information to researchers or industry projects)?
Base: All growers who grew cotton during the 2025-26 season; n = 200



Did you have any cotton industry research trials and/or private trials on your farm during the 2025-26 cotton growing season? *

Base: All growers who grew cotton during the 2025-26 season; n = 200



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Yes	27%	12%	22%	19%	39%	26%	9%	22%	38%
No	73%	85%	75%	81%	61%	71%	89%	76%	62%
I'm not sure	0%	3%	3%	0%	0%	3%	2%	2%	0%

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Yes	40%	35%	41%	49%	65%	57%	40%	45%	69%
No	60%	65%	50%	51%	35%	40%	56%	54%	29%
I'm not sure	0%	0%	9%	0%	0%	3%	4%	1%	2%

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
Industry Research Trials	33%	32%	28%	34%	43%	23%	19%	33%	47%
Private Trials	40%	26%	16%	34%	26%	37%	21%	28%	42%

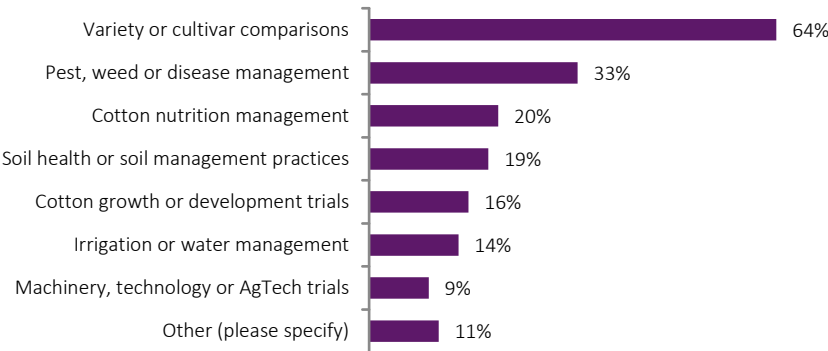
* Question is new to the 2026 research.

On-Farm Trials

Types of trials and perceptions of cotton RD&E

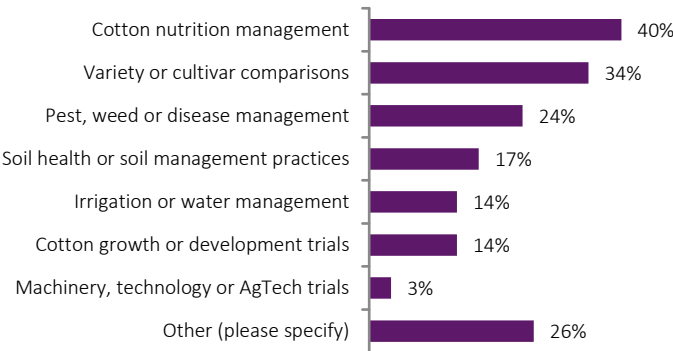
What type(s) of **industry research** on-farm trials or experiments did you undertake?
Please select all that apply. *

Base: All growers who reported being involved in Industry Research Trials; n = 64

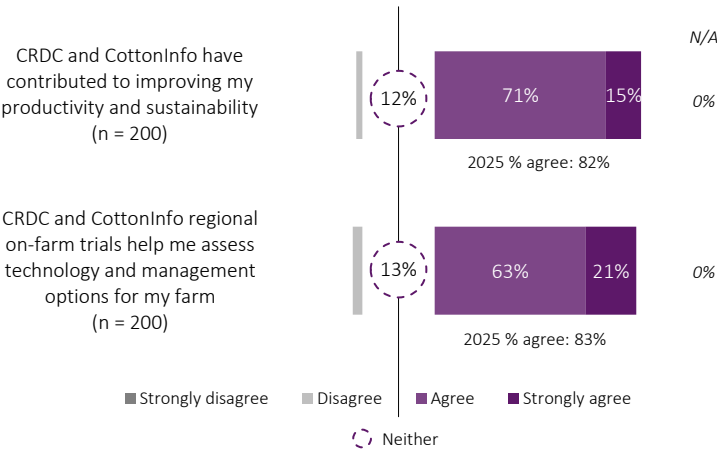


What type(s) of **private** on-farm trials or experiments did you undertake?
Please select all that apply. *

Base: All growers who reported being involved in Private Trials; n = 58



Please tell us whether you agree or disagree with the following statements...
Base: All growers who grew cotton during the 2025-26 season; n = 200



Key results by Region and Size of Total Farm Area (% agree + % strongly agree)

	Central QLD (n=15)	Darling Downs (n=34)	Macintyre Balonne (n=32)	Northern NSW (n=53)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=57)	Medium (n=98)	Large (n=45)
CRDC and CottonInfo have contributed to improving...	87%	97%	88%	83%	87%	77%	84%	87%	84%
CRDC and CottonInfo regional on-farm trials help me assess...	87%	91%	81%	83%	83%	83%	77%	88%	82%

Result labels shown if 5% or greater.
* Question is new to the 2026 research.



FOCUS AREA

Cotton Field History

Thinking about your cotton field history, of the IRRIGATED cotton hectares in 2025-26, how many were...

Base: All growers who grew cotton during the 2025-26 season on irrigated hectares; n = 181

	% of growers with at least one hectare of this history *	2024:
Back-to-back cotton, i.e. cotton grown in the same field in the 2024-25 and 2025-26 seasons	42%	49%
Following Summer fallow, i.e. no crop in the 2024-25 Summer or 2025 Winter, but cropped in 2023-24 Summer or 2024 Winter	41%	34%
Following long fallow, i.e. no crop in the 2025 Winter, 2024-25 Summer, 2024 Winter or 2023-24 Summer	34%	46%
'Double cropped', i.e. following crop in Winter 2025 that was harvested	9%	12%
Following a cover crop, i.e. crop planted and terminated/not harvested (i.e. sprayed out, slashed, crimped, incorporated)	10%	7%
New fields, i.e. never had cotton grown there previously	3%	3%
Other (please specify)	7%	n/a

	Average proportion of cotton area with this history	2024:
Back-to-back cotton, i.e. cotton grown in the same field in the 2024-25 and 2025-26 seasons	26%	27%
Following Summer fallow, i.e. no crop in the 2024-25 Summer or 2025 Winter, but cropped in 2023-24 Summer or 2024 Winter	32%	26%
Following long fallow, i.e. no crop in the 2025 Winter, 2024-25 Summer, 2024 Winter or 2023-24 Summer	26%	34%
'Double cropped', i.e. following crop in Winter 2025 that was harvested	4%	7%
Following a cover crop, i.e. crop planted and terminated/not harvested (i.e. sprayed out, slashed, crimped, incorporated)	6%	4%
New fields, i.e. never had cotton grown there previously	1%	1%
Other (please specify)	5%	n/a

Key results by Region and Size of Total Farm Area *

	Central QLD (n=14)	Darling Downs (n=28)	Macintyre Balonne (n=31)	Northern NSW (n=43)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=53)	Medium (n=85)	Large (n=43)
Back-to-back cotton	86%	46%	77%	21%	39%	9%	47%	41%	37%
Following Summer fallow	14%	32%	32%	44%	43%	71%	38%	40%	49%
Following long fallow	0%	39%	35%	47%	43%	26%	13%	36%	56%
'Double cropped'	21%	14%	13%	9%	0%	0%	4%	13%	7%
Following a cover crop	14%	14%	16%	0%	9%	11%	13%	6%	14%
New fields	7%	4%	0%	2%	0%	6%	2%	4%	5%
Other	7%	11%	10%	7%	0%	6%	9%	8%	2%

	Central QLD (n=14)	Darling Downs (n=28)	Macintyre Balonne (n=31)	Northern NSW (n=43)	Macquarie (n=23)	Southern NSW (n=35)	Small (n=53)	Medium (n=85)	Large (n=43)
Back-to-back cotton	77%	29%	44%	10%	20%	5%	36%	24%	18%
Following Summer fallow	4%	20%	14%	38%	37%	65%	33%	31%	33%
Following long fallow	0%	28%	20%	38%	37%	20%	11%	28%	38%
'Double cropped'	3%	8%	4%	7%	0%	0%	3%	6%	2%
Following a cover crop	9%	8%	12%	0%	5%	4%	10%	4%	5%
New fields	<1%	1%	0%	1%	0%	1%	<1%	1%	2%
Other	7%	6%	5%	6%	0%	6%	5%	6%	2%

* Multiple field histories could be reported – results may not add to 100%.

Cotton Field History

Raingrown / Dryland cotton field history

Thinking about your cotton field history, of the RAINGROWN | DRYLAND cotton hectares in 2025-26, how many were...

Base: All growers who grew cotton during the 2023-24 season on raingrown/dryland hectares; n = 61

	% of growers with at least one hectare of this history *	2024:
Back-to-back cotton, i.e. cotton grown in the same field in the 2024-25 and 2025-26 seasons	15%	7%
Following Summer fallow, i.e. no crop in the 2024-25 Summer or 2025 Winter, but cropped in 2023-24 Summer or 2024 Winter	26%	17%
Following long fallow, i.e. no crop in the 2025 Winter, 2024-25 Summer, 2024 Winter or 2023-24 Summer	49%	74%
'Double cropped', i.e. following crop in Winter 2025 that was harvested	10%	7%
Following a cover crop, i.e. crop planted and terminated/not harvested (i.e. sprayed out, slashed, crimped, incorporated)	7%	2%
New fields, i.e. never had cotton grown there previously	2%	4%
Other (please specify)	2%	n/a

	Average proportion of cotton area with this history	2024:
Back-to-back cotton, i.e. cotton grown in the same field in the 2024-25 and 2025-26 seasons	11%	6%
Following Summer fallow, i.e. no crop in the 2024-25 Summer or 2025 Winter, but cropped in 2023-24 Summer or 2024 Winter	25%	15%
Following long fallow, i.e. no crop in the 2025 Winter, 2024-25 Summer, 2024 Winter or 2023-24 Summer	47%	70%
'Double cropped', i.e. following crop in Winter 2025 that was harvested	8%	5%
Following a cover crop, i.e. crop planted and terminated/not harvested (i.e. sprayed out, slashed, crimped, incorporated)	6%	1%
New fields, i.e. never had cotton grown there previously	2%	3%
Other (please specify)	1%	n/a

Key results by Region and Size of Total Farm Area *

	Central QLD (n=1)	Darling Downs (n=20)	Macintyre Balonne (n=5)	Northern NSW (n=32)	Macquarie (n=1)	Southern NSW (n=0)	Small (n=12)	Medium (n=36)	Large (n=13)
Back-to-back cotton	100%	35%	0%	0%	100%	-	50%	6%	8%
Following Summer fallow	0%	25%	40%	28%	0%	-	8%	31%	31%
Following long fallow	0%	35%	60%	63%	0%	-	8%	56%	69%
'Double cropped'	0%	5%	0%	13%	0%	-	17%	8%	8%
Following a cover crop	0%	15%	0%	0%	0%	-	17%	6%	0%
New fields	0%	0%	0%	3%	0%	-	8%	0%	0%
Other	0%	0%	0%	0%	0%	-	0%	3%	0%

	Central QLD (n=1)	Darling Downs (n=20)	Macintyre Balonne (n=5)	Northern NSW (n=32)	Macquarie (n=1)	Southern NSW (n=0)	Small (n=12)	Medium (n=36)	Large (n=13)
Back-to-back cotton	100%	23%	0%	0%	100%	-	43%	4%	1%
Following Summer fallow	0%	24%	40%	27%	0%	-	7%	29%	31%
Following long fallow	0%	35%	60%	59%	0%	-	8%	54%	64%
'Double cropped'	0%	5%	0%	11%	0%	-	17%	6%	4%
Following a cover crop	0%	13%	0%	0%	0%	-	17%	4%	0%
New fields	0%	0%	0%	3%	0%	-	8%	0%	0%
Other	0%	0%	0%	0%	0%	-	0%	2%	0%

* Multiple field histories could be reported – results may not add to 100%.



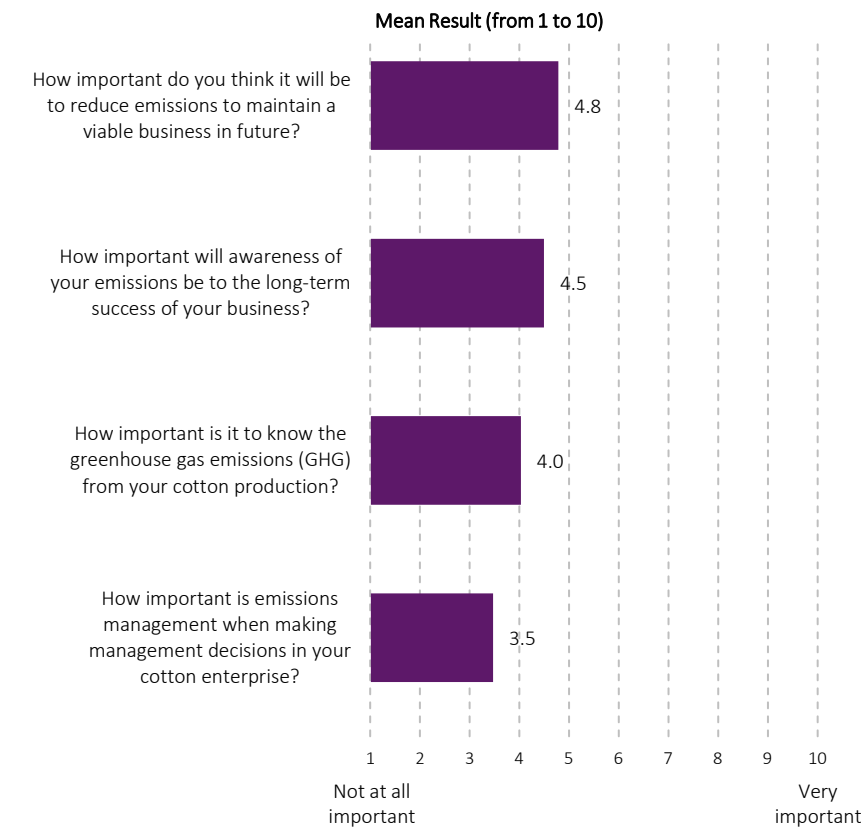
FOCUS AREA

Sustainability and GHG Emissions

Importance of emissions management

Thinking about your cotton enterprise, how important are each of the following in regards to emissions management? Please use a scale of 1-10, where 1 is not at all important and 10 is very important: *

Base: All growers (asked via rotation); n = 107 †



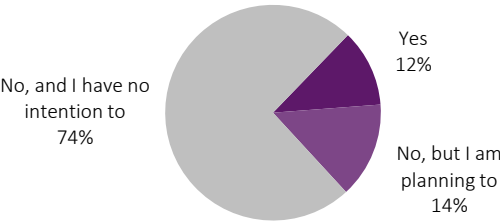
Key results by Region and Size of Total Farm Area

	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
How important do you think it will be to reduce emissions to maintain a viable business in future?	3.4	5.3	5.9	5.1	4.0	4.7	4.1	4.7	6.0
How important will awareness of your emissions be to the long-term success of your business?	3.6	3.9	5.3	4.4	4.3	4.7	3.8	4.3	6.0
How important is it to know the greenhouse gas emissions (GHG) from your cotton production?	3.8	3.6	4.6	3.8	4.6	4.2	3.5	3.9	5.1
How important is emissions management when making management decisions in your cotton enterprise?	2.6	3.4	5.1	3.1	3.4	3.6	3.1	3.4	4.2

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Have you measured your greenhouse gas emission? *

Base: All growers; n = 216



2024:

Yes 23%

No, planning to 32%

No, no intention 45%

Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Yes	7%	3%	13%	16%	26%	5%	0%	13%	26%
No, but I am planning to	13%	22%	6%	18%	9%	12%	14%	12%	21%
No, and I have no intention to	80%	76%	81%	66%	65%	83%	86%	76%	53%

Have you made any changes to your cotton production system in order to lower your greenhouse gas emissions? *

Base: All growers; n = 216



33%

Have made changes to their cotton production system in order to lower their greenhouse gas emissions

67% reported they have not made changes to their cotton production system

2024:

Yes 34%

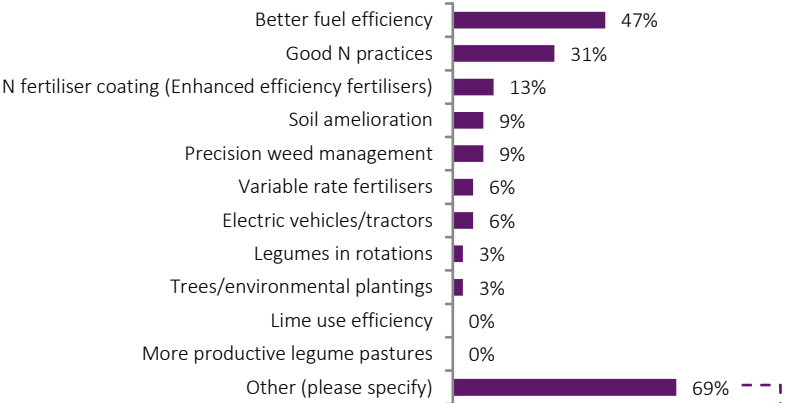
	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Yes	20%	35%	38%	38%	35%	29%	32%	27%	49%
No	80%	65%	63%	63%	65%	71%	68%	73%	51%

* Question asked in 2024 referenced “carbon footprint” instead of “greenhouse gas emission”.

33% made changes to their cotton production system in order to lower their greenhouse gas emissions. . .

What are the top 3 actions you have taken to reduce emissions?
Please select up to three. *

Base: All growers who have made changes to their cotton production system in order to lower their greenhouse gas emissions (asked via rotation); n = 32 †



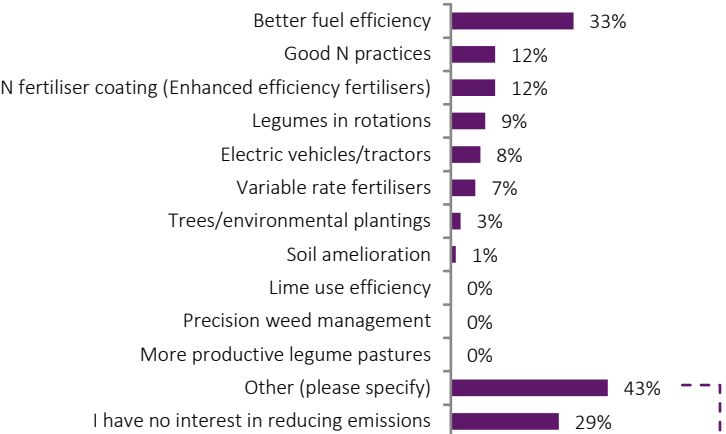
Some response to "Other (please specify)". . .

- "Better fertiliser practices - slow release adoption, in-crop biological sprays to reduce fertiliser, change of application technique of fertiliser to reduce evaporation,"
- "Changes to irrigation methods so less field activity. Fewer field passes in growing crop."
- "Use of spray technologies to reduce passes. Use of compost in soils to build soil carbon."
- "Data collection to understand figures, adjusting on-farm practices, minimise waste."
- "Less solid fertiliser, e.g. nitrogen, using liquid fertiliser."
- "The right equipment for the job, using the newer equipment."
- "Keeping machinery passes to a minimum. Stubble retention."
- "Direct drill rather than spreading fertiliser."

67% have **not** made changes to their cotton production system in order to lower their greenhouse gas emissions. . .

If you want to make changes to reduce emissions, what would be the top 3 actions you would take?
Please select up to three. *

Base: All growers who have **not** made changes to their cotton production system in order to lower their greenhouse gas emissions (asked via rotation); n = 75 †



Some response to "Other (please specify)". . .

- "More efficient ground preparation. Less movement across fields. Manufacturers need to be more efficient in their production of e.g. fertilisers."
- "Irrigation changes from overhead as uses less passes, better stubble management, less vehicle movement in field."
- "Better varieties for pest control to reduce in-field operations."
- "Change / reduce fertiliser use. More efficient irrigation."
- "Renewable power use - solar on pumps. Less field traffic."
- "Grow more cotton and other crops to absorb CO2."
- "Cost efficiency e.g. fuel and nitrogen."

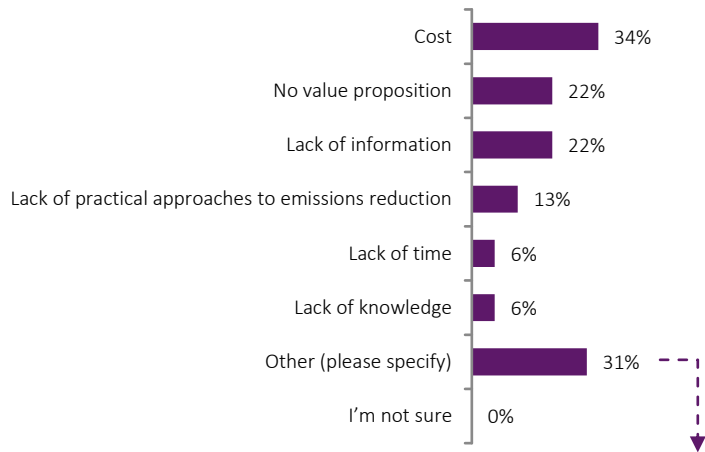
* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

What's stopping them from further reducing emissions

33% made changes to their cotton production system in order to lower their greenhouse gas emissions. . .

67% have **not** made changes to their cotton production system in order to lower their greenhouse gas emissions. . .

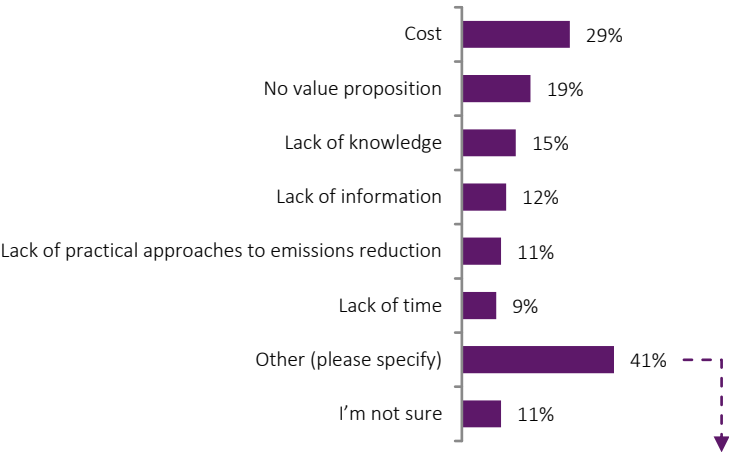
What's stopping you from further reducing emissions in your cotton production?
Please select up to three. *
Base: All growers who have made changes to their cotton production system in order to lower their greenhouse gas emissions (asked via rotation); n = 32 †



Some response to "Other (please specify)". . .

- "Don't want to focus too much on it now in case they mandate it, don't want to take it upfront too early, want to show continuous improvement."
- "Lack of financial incentive to do it, no incentive to grow whether solar electricity or coal fired electricity."
- "Physics. Need a power source either diesel or electric. Struggling to find answers to do better."
- "Nothing at the moment, need to get some more information to make sure its profitable."
- "The world environment on hold, everyone is tightening their belts."
- "Lack of payment (not paid for it)."
- "Business want or desire."

What's stopping you from reducing emissions in your cotton production?
Please select up to three. *
Base: All growers who have **not** made changes to their cotton production system in order to lower their greenhouse gas emissions (asked via rotation); n = 75 †



Some response to "Other (please specify)". . .

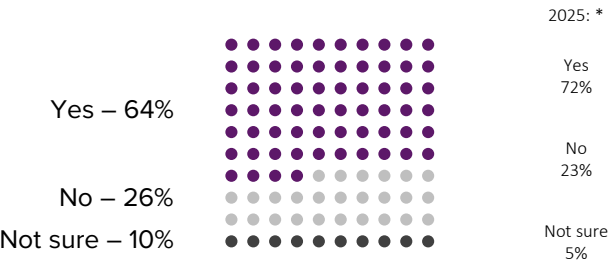
- "The biggest scam of the current generation. Developed countries are damaging productivity while other countries are largely unregulated - it is not a level playing field."
- "Lack of will and interest and not making it my priority, there are so many other priorities to surviving until it is something important to your survival."
- "Other industries outside of farming I think are heavier polluters than the industries that provide food and fiber for people to live."
- "With our high yielding crops and minimum till, we are taking more CO2 out of the atmosphere than we put in."
- "Lack of interest. Other countries are not making an effort. Australia is minimal compared to others."

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Sustainability and GHG Emissions

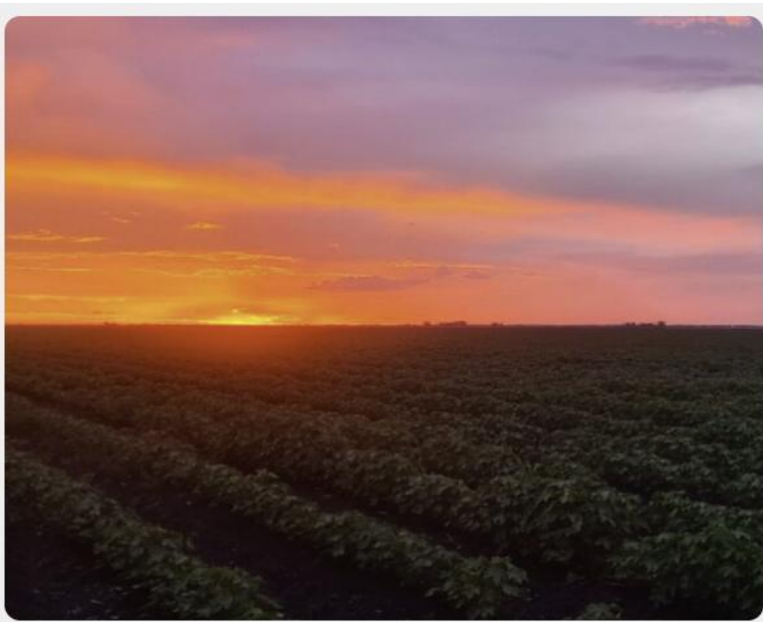
Alignment of myBMP and PLANET. PEOPLE. Paddock.

Has CottonInfo helped you to understand how myBMP aligns with the Australian cotton industry sustainability framework, PLANET.PEOPLE.PADDOCK?
Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Yes	53%	78%	53%	71%	57%	59%	61%	66%	66%
No	40%	11%	38%	23%	30%	27%	26%	24%	30%
Not sure	7%	11%	9%	5%	13%	15%	14%	10%	4%



PLANET. PEOPLE. PADDOCK.

PLANET. PEOPLE. PADDOCK. is the Australian cotton industry’s framework to achieve its vision of being a global leader in sustainable cotton production. It guides work to:

- identify the environmental, social and economic topics assessed as being most important to industry and its stakeholders
- coordinate a whole-of-industry strategy to manage these topics
- engage with stakeholders on actions and progress.

PLANET. PEOPLE. PADDOCK. is not a compulsory standard or a brand. It is a framework that recognises sustainability is an integral part of doing business, and provides a path for the entire industry to benefit from improving sustainability performance.

* Question in 2025 was only asked to those aware of the “PLANET. PEOPLE. PADDOCK.” sustainability program.

Sustainability and GHG Emissions

Proving evidence of sustainability-related practices

Thinking about external requests from markets, merchants, lenders, and certification schemes or other organisations, are you being asked to provide evidence of any environmental or other sustainability-related practices or outcomes for any of the following? Please select all that apply. *

Base: All growers (asked via rotation); n = 107 †

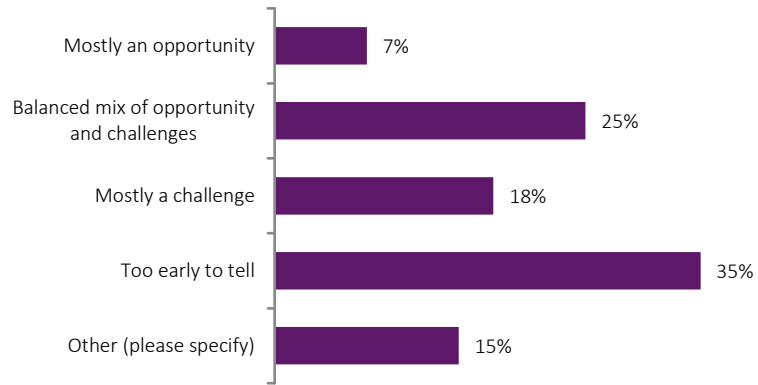
	Yes	No, but required in the future	No	Don't know
Chemical use practices/outcomes	42%	5%	52%	1%
Water use practices/outcomes	31%	3%	65%	1%
Workplace health & safety practices/outcomes	30%	3%	66%	1%
Biodiversity practices/outcomes	24%	2%	73%	1%
Soil health practices/outcomes	18%	4%	77%	2%
Greenhouse gas emissions practices/outcomes	14%	7%	78%	2%
Human rights	10%	1%	87%	2%
Other (please specify)	7%	0%	93%	n/a

Key results by Region and Size of Total Farm Area (% Yes)

	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
Chemical use	38%	47%	43%	38%	42%	44%	24%	41%	73%
Water use	38%	33%	43%	21%	17%	40%	21%	33%	41%
WH&S	25%	40%	43%	28%	25%	24%	12%	29%	59%
Biodiversity	38%	13%	36%	17%	17%	28%	15%	24%	41%
Soil health	38%	13%	14%	14%	25%	20%	6%	16%	41%
GHG emissions	25%	7%	21%	10%	8%	16%	3%	8%	45%
Human rights	38%	0%	14%	3%	8%	12%	3%	8%	27%
Other	13%	7%	7%	7%	0%	8%	3%	8%	14%

How do you think providing this sustainability information affects your business? *

Base: All growers (asked via rotation); n = 107 †



	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
Mostly an opportunity	0%	20%	7%	7%	0%	4%	0%	10%	14%
Balanced mix	63%	20%	36%	24%	8%	24%	26%	24%	27%
Mostly a challenge	0%	13%	29%	7%	42%	24%	9%	22%	23%
Too early to tell	0%	33%	21%	48%	33%	32%	38%	31%	36%
Other	38%	13%	7%	14%	17%	16%	26%	14%	0%

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.



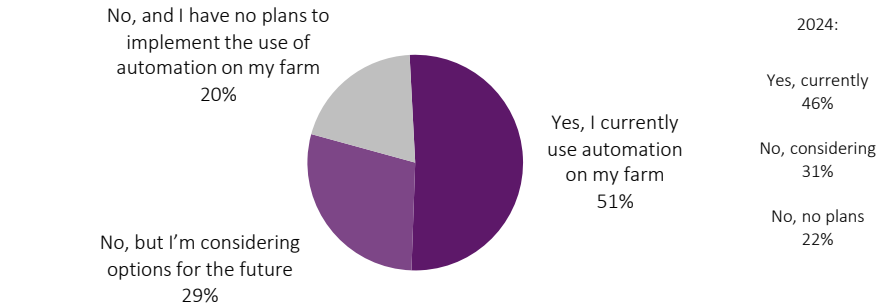
FOCUS AREA

Technology

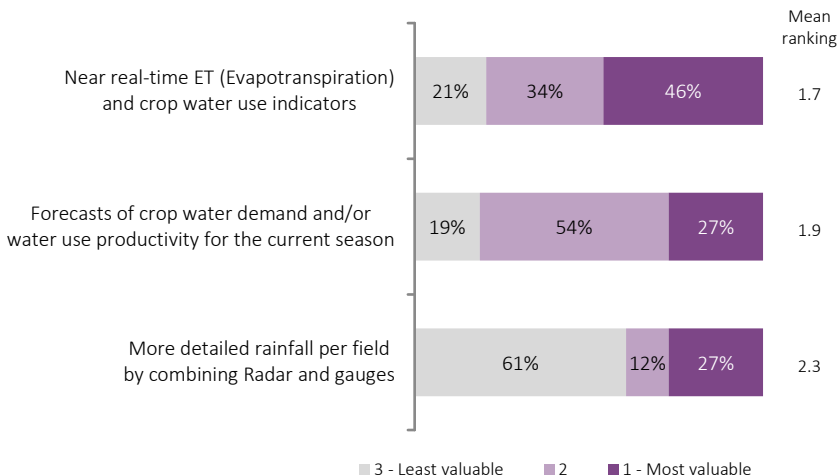
Technology

Automation on-farm, new technologies and remote sensing

Are you currently using any automation (including automation for irrigation) on your farm?
Base: All growers; n = 216



Adopting new digital technologies can have a significant impact on cotton farming. If you had to recommend a new digital technology for use in cotton farming, what order would you place the following points in relation to their importance. *
Base: All growers (asked via rotation); n = 107 †



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Yes, currently	47%	51%	44%	50%	70%	51%	48%	49%	62%
No, considering	27%	24%	25%	36%	26%	27%	26%	31%	28%
No, no plans	27%	24%	31%	14%	4%	22%	26%	20%	11%

Key results by Region and Size of Total Farm Area (% rating “1 – Most valuable”)

	Central QLD (n=8)	Darling Downs (n=19)	Macintyre Balonne (n=16)	Northern NSW (n=30)	Macquarie (n=10)	Southern NSW (n=17)	Small (n=30)	Medium (n=54)	Large (n=23)
Near real-time ET (Evapotranspiration) and crop water use indicators	38%	47%	56%	40%	40%	59%	50%	43%	48%
Forecasts of crop water demand and / or water use productivity for the current season	50%	32%	25%	20%	40%	12%	37%	24%	22%
More detailed rainfall per field by combining Radar and gauges	13%	21%	19%	40%	20%	29%	13%	33%	30%

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Thinking more broadly about remote sensing (e.g. satellite imagery), are there any additional services or insights you would like to see that you don't currently have access to? *

Base: All growers who provided an answer (asked via rotation); n = 107 †

Please note: If respondent could not answer / didn't know, respondents was prompted with "Examples include crop health, crop water demand, crop disease, weed and pest mapping, measurement of farm scale natural capital."

63% (n = 67) reported "No" or "Nothing" when asked about any additional services or insights they would like to see that they currently don't have access to.

Of the remaining 37% (n = 40). . .

Examples aligning with prompt:

9% (n = 10) - Crop health

8% (n = 9) - Weed and pest mapping

7% (n = 7) - Crop disease

6% (n = 6) - Crop water demand

2% (n = 2) - Measurement of farm scale natural capital

Unprompted examples mentioned:

"The satellite imagery of the green leaf, think it is called "Biomass", some of the agronomists subscribe & get access to the information. From above to be able to track & monitor the maturation of the plant, diseases, to look at the canopy in detail."

"Soil potential, water holding capacity measured remotely. This would help with our greatly variable soils and save on inputs."

"Something that can be an early detection for weather conditions, works like a weather station for crop and leaf diseases."

"Rainfall and rainfall prediction is the only thing important to me as I don't irrigate."

"WAND (would be good if this wasn't a paid service) predicts inversions."

"Real time nutrient use and forecast in conjunction with rain forecast."

"Better access to NVDI satellite images instead of subscription."

"Better satellite imaging of crops."

"Field gauge giving moisture in soils (an improved "How Wet")"

"Better resolution satellite imagery."

"Nitrogen in foliage."

"Remote sensing for yield potential."

"Real time satellite data images."

"Implant nitrogen status."

"Soil nutrition area."

"Nutrition."

* Question is new to the 2026 research.

† Question was asked on rotation to roughly 50% of respondents.



FOCUS AREA

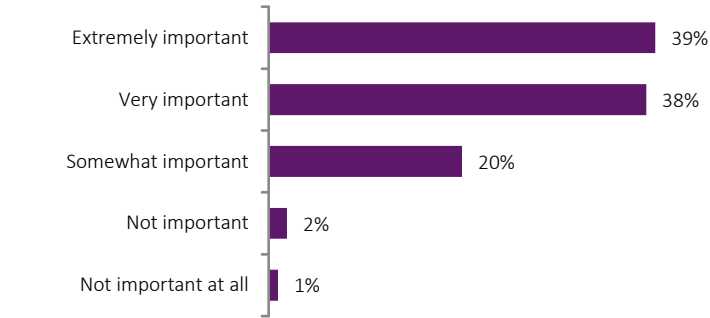
Leadership, Training and Education

Leadership, Training and Education

Importance of investment in leadership development

How important do you think industry investment in leadership development is for the future of the Australian cotton industry? *

Base: All growers (asked via rotation); n = 107 †



What would you most like cotton industry leadership programs to deliver for the industry and growers like you? Please select all that apply. *

Base: All growers (asked via rotation); n = 107 †



Key results by Region and Size of Total Farm Area

	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
Extremely important	38%	40%	43%	24%	42%	52%	35%	35%	55%
Very important	38%	40%	29%	55%	17%	36%	47%	43%	14%
Somewhat important	25%	13%	29%	17%	33%	12%	15%	22%	23%
Not important	0%	7%	0%	0%	8%	0%	0%	0%	9%
Not important at all	0%	0%	0%	3%	0%	0%	3%	0%	0%

	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
Build networks and connections across...	75%	80%	50%	72%	58%	64%	68%	63%	77%
Build practical leadership skills...	75%	80%	57%	59%	67%	52%	53%	65%	68%
Strengthen strategic thinking...	75%	73%	50%	55%	75%	48%	50%	65%	59%
Improve work health and safety (WHS)...	63%	67%	43%	59%	67%	56%	41%	69%	59%
Improve people management...	63%	67%	43%	59%	67%	52%	44%	61%	68%
Gain governance skills...	50%	73%	50%	59%	58%	44%	47%	63%	50%
Better prepared to take on roles...	63%	73%	50%	52%	58%	40%	41%	61%	59%
Develop confidence to step up...	63%	60%	36%	45%	50%	52%	47%	49%	55%
Build inclusive and diverse practices	50%	53%	43%	52%	67%	40%	44%	53%	50%
Other	0%	0%	14%	7%	17%	4%	6%	6%	18%
Don't have a clear view	13%	13%	21%	3%	8%	20%	21%	8%	9%

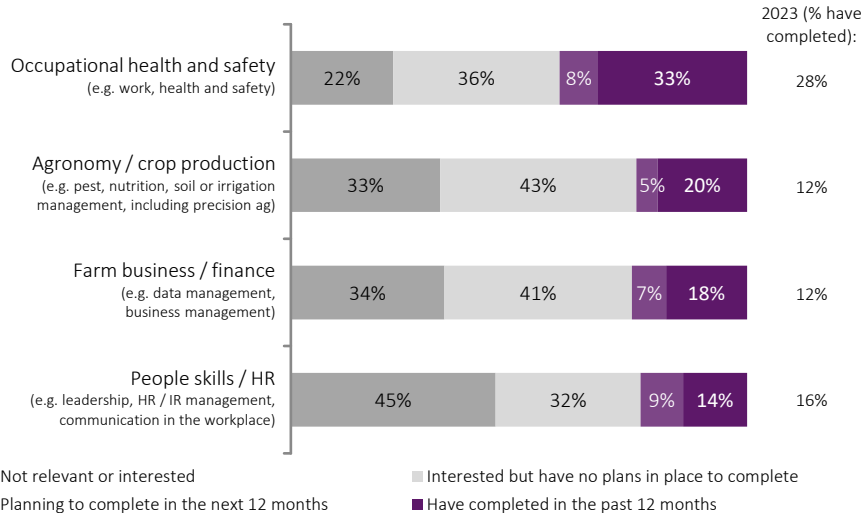
* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Leadership, Training and Education

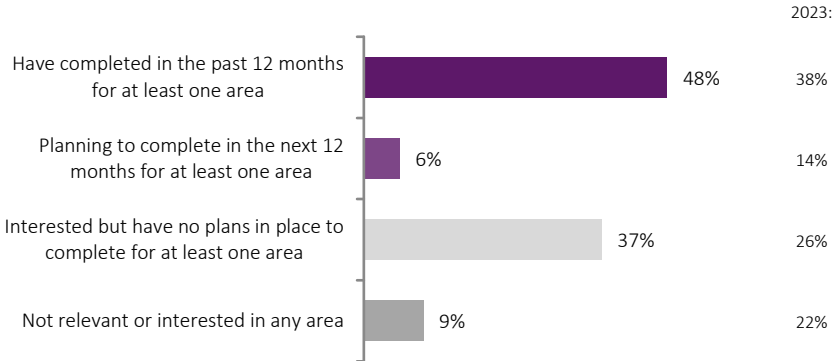
Training completed over the last 12 months

There are many different areas of training that may be relevant for you, your farm manager or farm workers. Which of the following training have you or your staff completed over the last 12 months or would be relevant and of interest to you, your farm manager or farm workers?

Base: All growers (asked via rotation); n = 107 †



Level of involvement



Key results by Region and Size of Total Farm Area (% have completed)

	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
Occupational health and safety	63%	40%	43%	38%	17%	20%	18%	29%	64%
Agronomy / crop production	38%	20%	7%	21%	17%	24%	15%	16%	36%
Farm business / finance	50%	20%	14%	17%	17%	12%	21%	12%	27%
People skills / HR	25%	27%	21%	14%	8%	4%	6%	8%	41%

	Central QLD (n=8)	Darling Downs (n=15)	Macintyre Balonne (n=14)	Northern NSW (n=29)	Macquarie (n=12)	Southern NSW (n=25)	Small (n=34)	Medium (n=51)	Large (n=22)
Have completed in the past 12 months	88%	53%	50%	52%	33%	40%	38%	43%	73%
Planning to complete in the next 12 months	0%	7%	7%	14%	0%	0%	6%	6%	5%
Interested but have no plans	13%	33%	36%	28%	67%	44%	29%	49%	23%
Not relevant or interested in any area	0%	7%	7%	7%	0%	16%	26%	2%	0%

† Question was asked on rotation to roughly 50% of respondents.

Are there any other training areas not mentioned previously that you or your staff have undertaken in the past 12 months or are interested in undertaking in the next 12 months? *

Base: All growers (asked via rotation); n = 107 †

69% (n = 74) reported “No” or “Nothing” when asked if there any other training areas not mentioned previously that they or their staff have undertaken in the past 12 months or are interested in undertaking in the next 12 months.

Of the remaining 31% (n = 33). . .

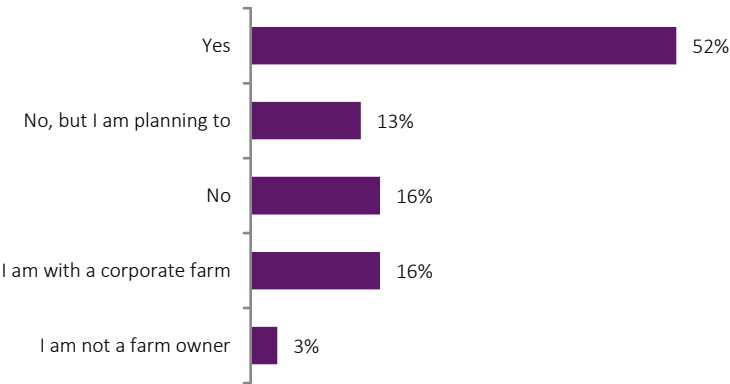
Areas mentioned:

- 8% - Chemicals (certificates, accreditations, etc.)
- 7% - Vehicle licensing (e.g. truck, forklift)
- 6% - First aid training
- 3% - Corporate governance / leadership
- 3% - Integrated pest management (inc. firearm training)
- 2% - Use of AI
- 2% - Spray operation training
- 2% - Machinery operation training

Other areas mentioned include agronomy, auto-electrical, use of drones, irrigation management, marketing, training and assessing, and WH&S.

If you are a non-corporate farm owner, do you have a succession plan in place? *

Base: All growers; n = 216

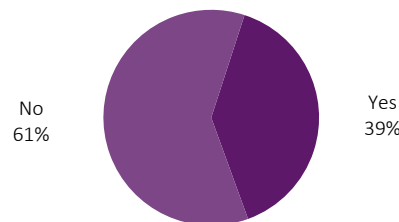


	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Yes	33%	54%	59%	48%	61%	56%	48%	57%	45%
No, but I am planning to	33%	24%	9%	9%	13%	5%	17%	14%	9%
No	20%	11%	9%	18%	17%	15%	30%	11%	6%
I am with a corporate farm	7%	8%	13%	23%	9%	22%	3%	13%	40%
I am not a farm owner	7%	3%	9%	2%	0%	2%	2%	6%	0%

* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.

Over the last five years, have you hosted teachers or school students on your property to learn about the industry or career pathways? *

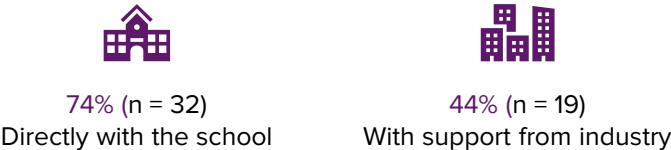
Base: All growers (asked via rotation); n = 109 †



Of the 39% (n = 43) who have hosted teachers/students in the last five years. . .

Was the school visit organised directly with the school and/or with support from industry? *

Base: All growers who have hosted teachers/students in the last five years (asked via rotation); n = 43 †

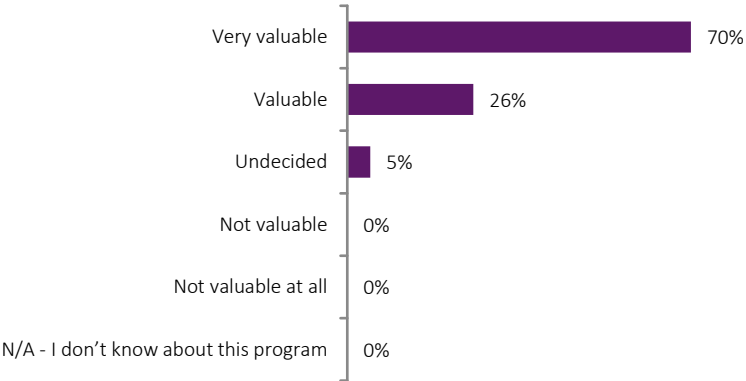


Key results by Region and Size of Total Farm Area

	Central QLD (n=7)	Darling Downs (n=22)	Macintyre Balonne (n=18)	Northern NSW (n=27)	Macquarie (n=11)	Southern NSW (n=16)	Small (n=32)	Medium (n=52)	Large (n=25)
Yes	29%	36%	39%	52%	45%	25%	31%	38%	52%
No	71%	64%	61%	48%	55%	75%	69%	62%	48%
I'm not sure	0%	0%	0%	0%	0%	0%	0%	0%	0%

Do you think that programs like Teach the Teacher are valuable in building long-term capability (e.g. workforce pipeline, industry understanding, social licence) for the industry? *

Base: All growers who have hosted teachers/students in the last five years (asked via rotation); n = 43 †



* Question is new to the 2026 research.
† Question was asked on rotation to roughly 50% of respondents.



FOCUS AREA

Community and Social Contribution

Community and Social Contribution

Local community activities and destination of business expenses

Which, if any, of the following local community activities are you involved in?
Please select all that apply.

Base: All growers; n = 216

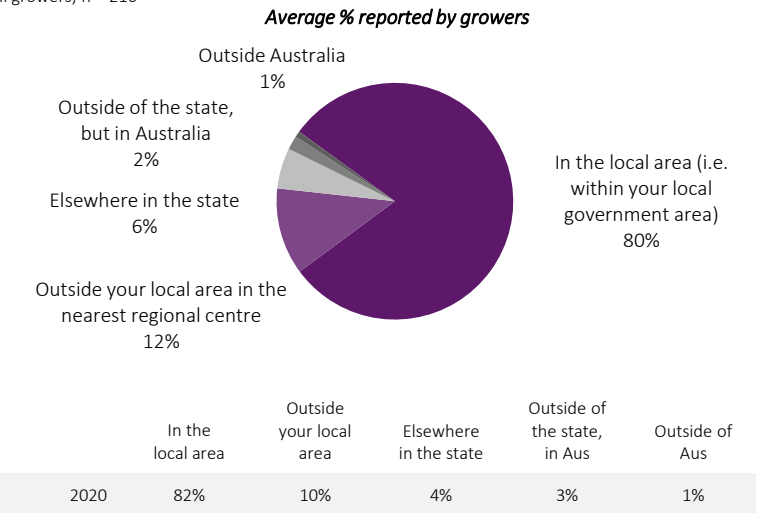


Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Attend local events	87%	89%	84%	88%	96%	83%	82%	87%	91%
Donations or sponsor charities/activities	87%	81%	78%	84%	83%	76%	67%	86%	89%
Involved in local community groups	73%	76%	69%	70%	74%	54%	55%	72%	81%
Involved in local sports	47%	32%	50%	64%	70%	59%	42%	55%	70%
Involved with the local schools	60%	38%	38%	41%	43%	37%	33%	38%	55%
Involved in other ways	20%	19%	16%	5%	13%	15%	15%	11%	13%
Not actively involved with the community	7%	3%	6%	7%	4%	7%	12%	4%	4%

Thinking of your total business expenses for the 2025-26 growing season, can you estimate what proportion would be spent...?

Base: All growers; n = 216



	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
In the local area (i.e. within your local government area)	74%	81%	79%	86%	78%	77%	77%	81%	80%
Outside your local area in the nearest regional centre	11%	12%	14%	7%	15%	15%	13%	11%	13%
Elsewhere in the state	7%	5%	5%	5%	5%	6%	6%	5%	5%
Outside of the state, but in Australia	1%	1%	3%	2%	2%	<1%	2%	2%	2%
Outside Australia	6%	<1%	0%	1%	<1%	1%	2%	<1%	<1%



FOCUS AREA

Industry Sentiment

Industry Sentiment

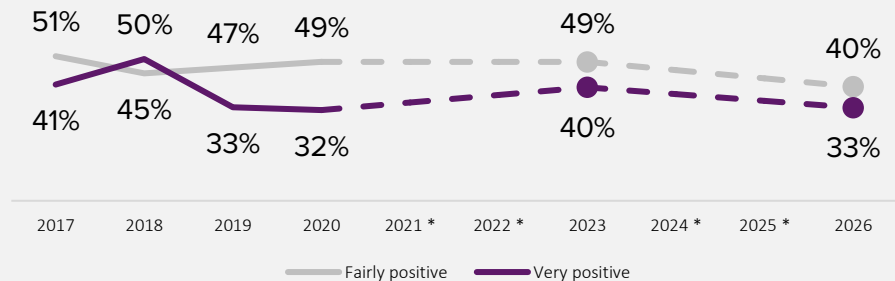
Feelings about the future of the cotton industry

The feedback from the 2026 CRDC Grower Survey indicates a slightly reduced level of confidence and optimism about the future of the cotton industry since last reported in 2023, with a decline in net sentiment (positive minus negative) of 22 points (+88 to +66) reported. We note that:

- The majority of growers continue to be positive about the future (73%).
- Two in five growers (40%) describe themselves as ‘fairly positive’, again reflecting perhaps a cautious optimism about the future of the industry.
- This level of cautious optimism remains largely consistent across all geographies and all farm sizes. Growers in the Macquarie and Southern NSW regions are slightly less optimistic than growers from other regions, against a backdrop of rainfall well below average.

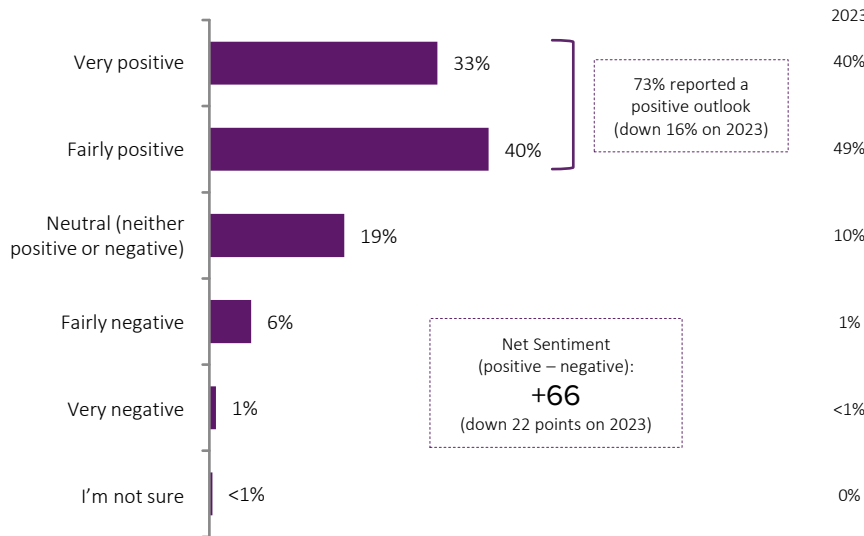
The results from this measure reported since 2017 are shown opposite

% rating positive across recent Grower Surveys



Overall, how do you feel about the future of the cotton industry.
Would you say you feel...?

Base: All growers; n = 216



Key results by Region and Size of Total Farm Area

	Central QLD (n=15)	Darling Downs (n=37)	Macintyre Balonne (n=32)	Northern NSW (n=56)	Macquarie (n=23)	Southern NSW (n=41)	Small (n=66)	Medium (n=103)	Large (n=47)
Positive Outlook	67%	95%	78%	70%	65%	66%	67%	79%	70%
Negative Outlook	0%	0%	6%	9%	9%	15%	9%	6%	6%
Net Sentiment	+67	+95	+72	+61	+57	+51	+58	+73	+64

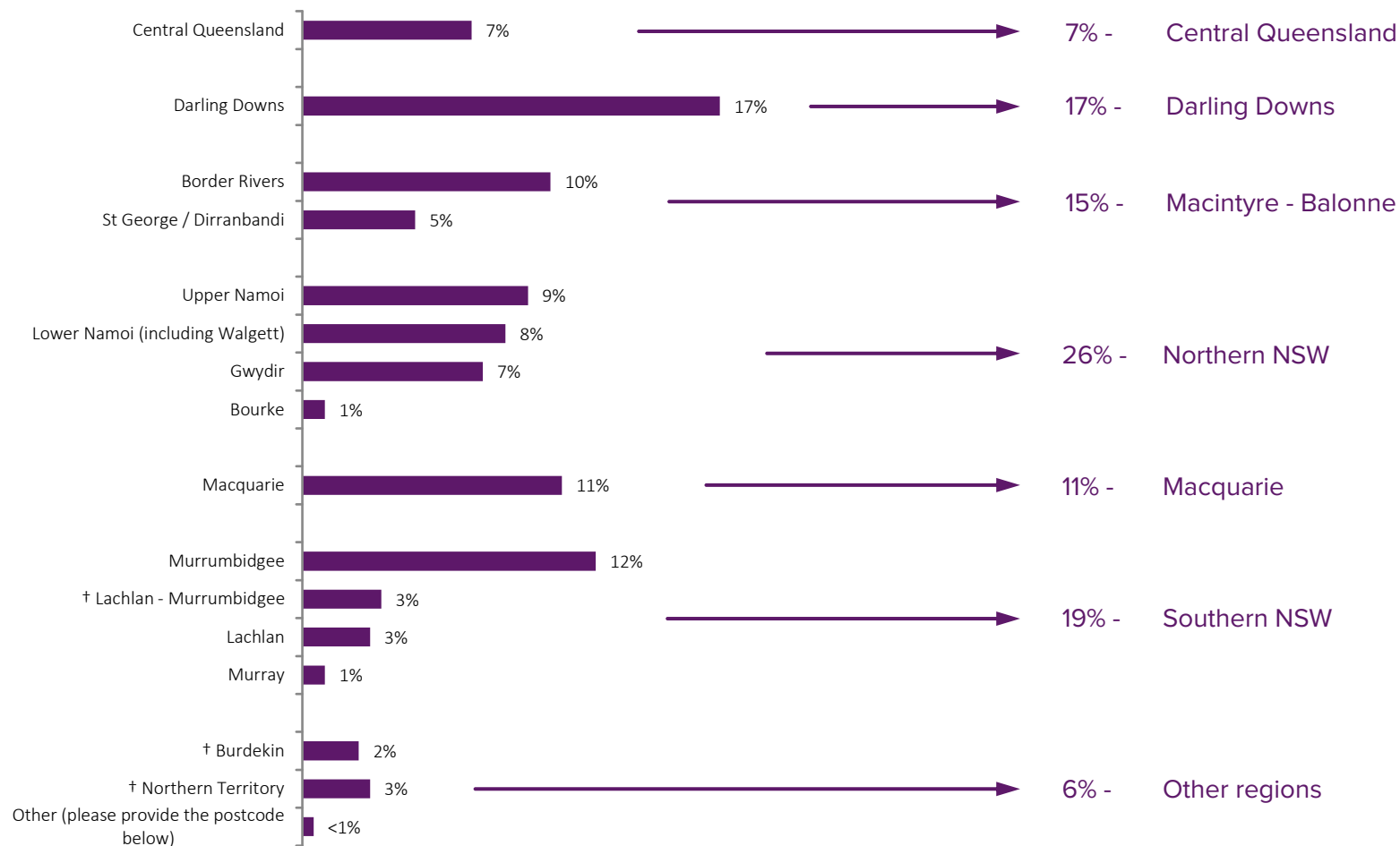
* Question not asked in 2021, 2022, 2024 or 2025.



Appendices

In which region are you located?

Base: All growers; n = 216

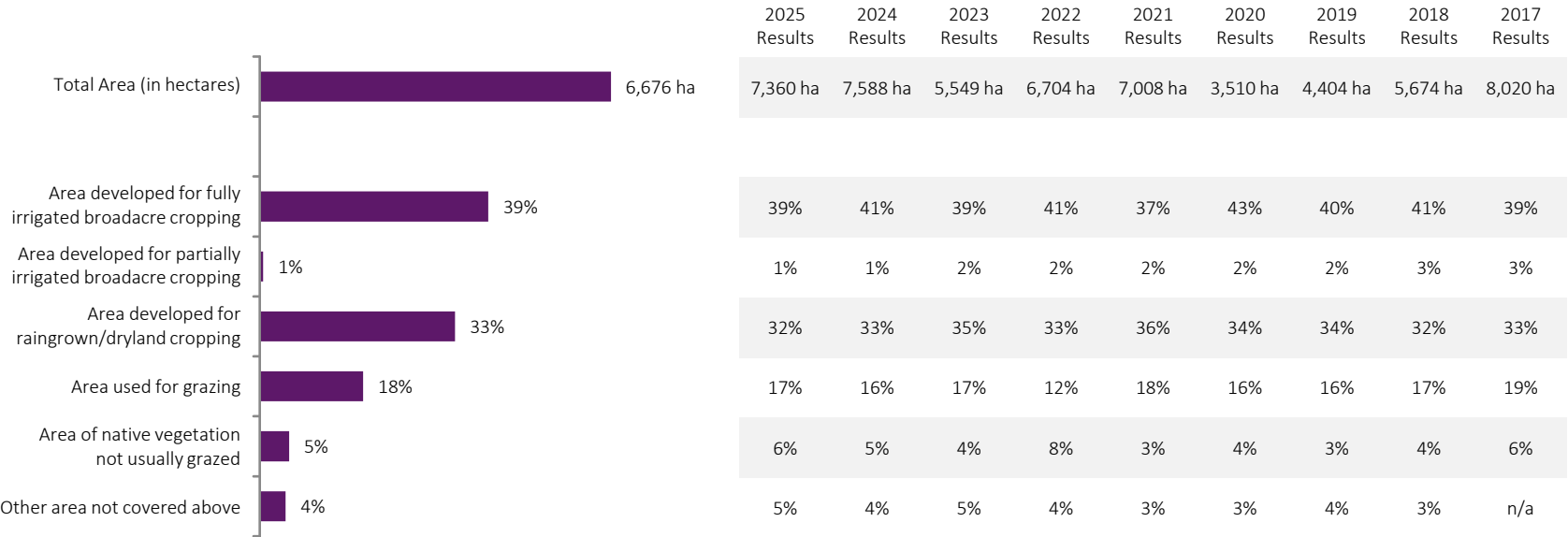


† Coded from Other (please provide postcode) answers.

Historical data of land area/distribution

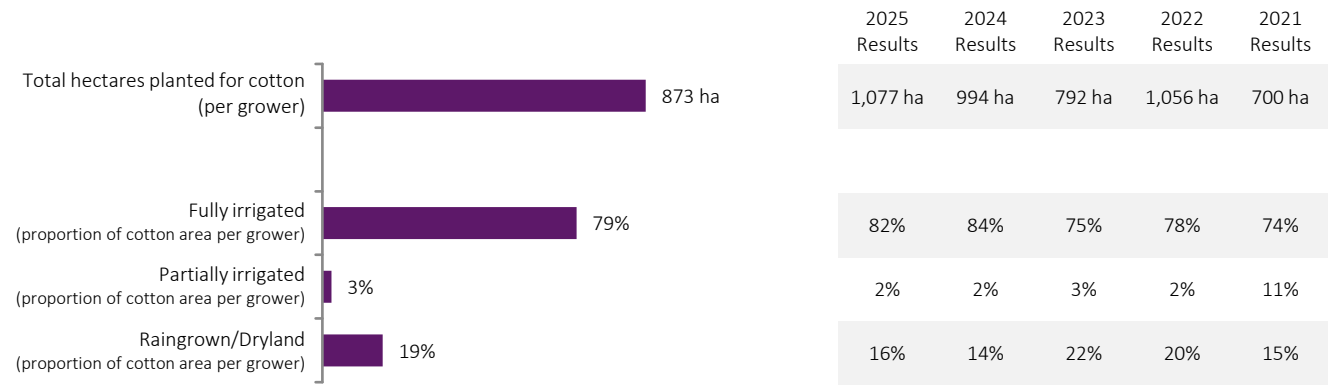
What is the total area of your farm (in hectares), and of the total area of your farm, what is the area attributed to the following?

Base: All growers; n = 216



Historical data of cotton area and fully irrigated yield

What was the total number of hectares planted for cotton during the 2025-26 cotton growing season?
And of these hectares, how many hectares were fully irrigated, partially irrigated or raingrown/dryland?
Base: All growers who grew cotton during the 2025-26 season; n = 200



What were your yields for the 2025-26 cotton growing season across the cotton areas?
Base: All growers who grew cotton during the 2025-26 season; n varies
(Fully Irrigated, n = 172, Raingrown/Dryland, n = 60)
Part irrigation not reported due to low sample size.

	Fully Irrigated (bales per ha)	2025 Results	2024 Results	2023 Results	2022 Results	2021 Results	2020 Results	2019 Results	2018 Results	2017 Results
Average yield	12.05	12.35	11.93	10.19	11.31	11.88	10.45	10.23	11.22	9.88
Yield achieved by your highest-yielding field (average of grower-reported yield)	13.79	14.11	13.57	11.96	13.03	13.13	11.55	11.95	12.61	11.07
Yield achieved by your lowest-yielding field (average of grower-reported yield)	10.14	10.24	10.13	8.19	9.09	10.38	9.24	8.53	9.46	8.22
Range of variation from average yield	3.65	3.87	3.44	3.77	3.94	2.74	2.31	3.42	3.15	2.85

Reliability of the Estimates

The estimates in this report are based on information obtained from a sample survey. Any data collection may encounter factors, known as non-sampling error, which can impact on the reliability of the resulting statistics. In addition, the reliability of estimates based on sample surveys are also subject to sampling variability. That is, the estimates may differ from those that would have been produced had all persons in the population been included in the survey.

Non-sampling error

Non-sampling error may occur in any collection, whether it is based on a sample or a full count such as a census. Sources of non-sampling error include non-response, errors in reporting by respondents or recording of answers by interviewers and errors in coding and processing data. Every effort is made to reduce non-sampling error by careful design of survey questionnaires and quality control procedures at all stages of data processing.

Sampling error

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of persons was included. There are about two chances in three (67%) that a sample estimate will differ by less than one SE from the number that would have been obtained if all persons had been surveyed, and about 19 chances in 20 (95%) that the difference will be less than two SEs.

Calculation of Confidence Interval

If 50% of all the people in a population of 20,000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes".

The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to more than the margin of error away from the true answer.

When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer.

In terms of the numbers selected above, the margin of error *MoE* is given by:

$$MoE = z * \sqrt{\frac{\hat{p}(1 - \hat{p})}{n}}$$

where *n* is the sample size, $\hat{p}$ is the fraction of responses that you are interested in, and *z* is the [critical value](#) for the 95% confidence level (in this case, 1.96).

This calculation is based on the [Normal distribution](#) and assumes you have more than about 30 samples.

Margin of Error for a given sample size and survey estimate		Sample Size											
		30	50	75	100	150	200 (# growers completed)	216 (# surveys completed)	250	300	500	1,000	1,500
Survey Estimate	10%	n/a	n/a	n/a	± 5.88%	± 4.80%	± 4.16%	± 4.00%	± 3.72%	± 3.39%	± 2.63%	± 1.86%	± 1.52%
	20%	n/a	± 11.09%	± 9.05%	± 7.84%	± 6.40%	± 5.54%	± 5.33%	± 4.96%	± 4.53%	± 3.51%	± 2.48%	± 2.02%
	30%	n/a	± 12.70%	± 10.37%	± 8.98%	± 7.33%	± 6.35%	± 6.11%	± 5.68%	± 5.19%	± 4.02%	± 2.84%	± 2.32%
	40%	± 17.53%	± 13.58%	± 11.09%	± 9.60%	± 7.84%	± 6.79%	± 6.53%	± 6.07%	± 5.54%	± 4.29%	± 3.04%	± 2.48%
	50%	± 17.89%	± 13.86%	± 11.32%	± 9.80%	± 8.00%	± 6.93%	± 6.67%	± 6.20%	± 5.66%	± 4.38%	± 3.10%	± 2.53%
	60%	± 17.53%	± 13.58%	± 11.09%	± 9.60%	± 7.84%	± 6.79%	± 6.53%	± 6.07%	± 5.54%	± 4.29%	± 3.04%	± 2.48%
	70%	n/a	± 12.70%	± 10.37%	± 8.98%	± 7.33%	± 6.35%	± 6.11%	± 5.68%	± 5.19%	± 4.02%	± 2.84%	± 2.32%
	80%	n/a	± 11.09%	± 9.05%	± 7.84%	± 6.40%	± 5.54%	± 5.33%	± 4.96%	± 4.53%	± 3.51%	± 2.48%	± 2.02%
	90%	n/a	n/a	n/a	± 5.88%	± 4.80%	± 4.16%	± 4.00%	± 3.72%	± 3.39%	± 2.63%	± 1.86%	± 1.52%

Note. Margin of Errors are provided at the 95% confidence level on the assumption of a large population size (non-finite) and normally distributed. Results labelled "n/a" are due to the assumption of the normal distribution not being upheld ($n\hat{p} < 10$ or $n(1-\hat{p}) < 10$).

Objective The purpose of the CRDC Cotton Grower Survey is to capture valuable information about cotton farming practices to give a greater understanding of the industry’s current practices and performance – so that trends can be monitored over time, practice change can be accurately measured, and areas for improvement and further RD&E investment identified. The annual Survey also aims to capture important information about growers’ understanding and perception of cotton RD&E, led by CRDC.

Methodology The 2026 Grower Survey was conducted using a CATI (Computer Assisted Telephone Interviewing) data collection methodology. This included:

- Growers being contacted and invited to complete the survey over the phone;
- Where this was not possible immediately, an interview appointment time was agreed and the interview completed at the agreed time.

Sample In total, n = 216 surveys were completed with businesses either currently growing cotton (n = 200) or have previously grown cotton (n = 16). A breakdown of the number of surveys completed by Region is located below.

Region	Completed Surveys	Region	Completed Surveys
Overall	216	Northern NSW	56
Central Queensland	15	Macquarie	23
Darling Downs	37	Southern NSW	41
Macintyre – Balonne	32	Other	12

Questionnaire Growers were asked to complete a 30-minute survey which covered a range of topics related to their cotton growing experience both on and off-farm. Key areas of interest included:

- Farm Profiles
- Your 2025-26 Cotton Crop
- Water
- Soil and Nutrition
- Disease and Pest Management
- On-Farm Trials

- Cotton Field History
- Sustainability and GHG Emissions
- Technology
- Leadership, Training and Education
- Community and Social Contribution
- Industry Sentiment

Please note that due to the length of the survey, a select few questions were presented on rotation to respondents to reduce the length of the survey.

Timing The survey was launched on 10 June 2026 and remained open until 7 July 2026.



Want more information?

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