Organic TRADE ASSOCIATION

2007 U.S. Organic Cotton Production & Marketing Trends

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Survey trends & global data
According to data from the Organic Trade Association's (OTA) 2008 survey of U.S. organic cotton producers and preliminary data from the Texas Organic Cotton Marketing Cooperative (TOCMC), producers have seen a 9% increase in total acres planted in organic cotton from 2007 to 2008. Table 1 below features data in organic cotton acreage planted since 1990. The last two years have shown in increase in planted acres, to a level close to some other more productive years. This change may reflect the newly available acreage data from TOCMC, which was included in 2007 and 2008 totals in the table. Planted acreage in 2007 is likely to be higher than 8,510 acres, as TOCMC's 2007 data for acreage *planted* and lost is not yet available, though TOCMC does not expect that number to be sizable. 2008 data below *does* include TOCMC figures on acreage planted and lost, as well as acreage harvested.

Table 1. Estimated U.S. Organic Cotton Acreage Planted: Trends

Year planted	Planted acres	% change from prior year
Acres Planted in 2008	9,279	+ 9%
Acres Planted in 2007	8,510 (updated in 2008)	+43%
Acres Planted in 2006	5,971	-6%
Acres Planted in 2005	6,325	+14%
Acres Planted in 2004	5,550	+37%
Acres Planted in 2003	4,060	-55%
Acres Planted in 2002	9,044	-22%
Acres Planted in 2001	11,586	-17%
Acres Planted in 2000	13,926	-17%
Acres Planted in 1999	16,785	+79%
Acres Planted in 1998	9,368	+4%
Acres Planted in 1997	9,050	-16%
Acres Planted in 1996	10,778	-56%
Acres Planted in 1995	24,625	+55%
Acres Planted in 1994	15,856	+28%
Acres Planted in 1993	12,402	+97%
Acres Planted in 1992	6,306	+92%
Acres Planted in 1991	3,290	+266%
Acres Planted in 1990	900	N/A

Percent Change 1998 - 2008	-1 %
Percent Change from 1995 peak – 2008	- 62 %

According to Organic Exchange's *Organic Cotton Farm and Fiber Report 2008,* U.S. organic cotton production places sixth among the top ten organic cotton producing countries. The top ten global organic cotton producers are ranked in that report in the following order from most to least production: India, Syria, Turkey, China, Tanzania, USA, Uganda, Peru, Egypt and Burkina Faso. India surpassed Turkey, the long-time number one producer, and most of the 152% increase in production was in India. Total global organic cotton production equaled 668,581 bales and was grown in 22 countries. Combining OTA's survey data with data from TOCMC, 2007 U.S. producers harvested 14,025 bales, 2.1% of global production. Larger demand on the part of retailers drove much of the increase in global production.

The cost per acre to grow U.S. organic cotton in 2007 ranged from $300 to $2,200 and averaged $693 among the seven respondents to this question. Two farmers replied that their cost for growing conventional cotton was $500 and $1,400 per acre in 2007.

Survey background

In 2008, the Organic Trade Association mailed surveys to 62 locations believed to be farming organic cotton. Surveys were sent to Arizona, California, New Mexico, Tennessee, and Texas, thought to represent all the states with growers of organic cotton in the United States in 2007. OTA identified growers from a list of farmers of organic cotton from the prior year's survey, state agencies and certification programs, a cooperative extension office, several commodity commissions, and organizations in the U.S. that work with organic farmers. In addition, all states in which producers grew conventional cotton in 2007, according to the USDA's National Agricultural Statistics Service, were asked if they knew of producers in their states that grew organic cotton. Cotton Incorporated funded the survey.

Five of the 62 who were sent surveys were removed from the survey population. One had rotated his crops and not planted cotton in 2007; another was no longer growing organic cotton. Three are in transition to growing organic cotton, and their responses were not included in the tabulations for this report. A total of 24 people from California, New Mexico, and Texas responded to the survey by mail or were reached by telephone or e-mail. Of those contacted, ten of the complete surveys qualified for and were included in the survey analysis because the respondents grew organic cotton in 2007. These ten surveys included five respondents who are members of the Texas Organic Cotton Marketing Cooperative (TOCMC), and the other five qualifying surveys were from farmers not associated with TOCMC. In 2008, TOCMC had a total of 30 farmer members in Texas growing organic cotton or with fields in transition to organic cotton.

On surveys that qualified for analysis in the report, all ten of the respondents have operated certified organic farms for at least three years. Five of these farmers have been organic producers for between twelve and sixteen years. On average, the farms have been certified organic for ten years.

Total area farmed by respondents in 2008 is 16,639 acres. Of that, 9,779 acres are planted with organic crops, including cotton, and 6,860 acres are not organic. Of that managed organically in 2008, 2,835 acres were planted for organic cotton production, according to responses to question 14 asking farmers the number of certified organic acres.

Total acreage each respondent planted, including both organic and non-organic land, ranged from 30 to 7,028 acres for 2008. On average, qualifying respondents farmed 315 acres of organic cotton per farm in 2008 (note: one qualifying survey was excluded from this tabulation because the respondent planted no organic cotton in 2008 due to its crop rotation). Survey analysis shows a total of 530 acres in transition to organic production, counting all crops, pasture, and livestock. An additional 550 acres in transition to organic were identified in the three surveys not otherwise qualified for analysis in the report, making a total of 1,080 acres in transition to organic production in 2007.

In 2008, respondents grew other organic crops in addition to cotton; land devoted to other organic crops ranged from 30 acres to 3,700 acres per farm. Respondents farmed a total of 6,999 acres of organic crops other than cotton, averaging 700 acres per farm, including two respondents who grew no other organic crops. Total acreage per farm of both organic and non-organic crops ranged from 60 acres to 7,028 acres, and averaged 1,664 acres.

Other crops and products grown organically included corn, soybeans, small grains (such as oats, barley, rye, millet and wheat), garlic, canning tomatoes, peanuts, walnuts, sesame, black beans, alfalfa, sorghum, seed crops, basil, cilantro, parsley, and triticale, a hybrid grain. Four farmers produced peanuts; seven grew grains; four grew corn; two alfalfa; two soybeans, and the other crops and products were each mentioned by only one respondent. None of the farmers produced meat animals or ran dairy farms.

As in prior years, a majority of respondents grew organic *upland* cotton in 2007, and a few grew organic *pima* cotton (specific numbers are not indicated to protect respondents' confidentiality).

Of the ten surveys, eight farmers reported total gross annual farm sales of over $100,000; one reported $10,000 to $24,999. Eight farmers had gross annual sales from their organic cotton of over $100,000, and one reported $25,000 to $49,999 in gross annual organic cotton sales. One farm had gross annual sales from organic cotton of $5,000 to $9,999.

Acreage and Production of Organic Cotton
ACRES PLANTED & HARVESTED

Table 2. Estimated Organic Cotton Acreage

Year	Planted acres	Harvested acres
2008	9,279	6,544
2007	8,510 (estimate)	8,510
2006	5,971	5,811

According to responses to this year's survey of organic cotton farmers, in 2007 farmers planted 2,481 acres of organic cotton, a decrease of 58% from the 5,971 acres planted in 2006. Respondents indicated they planted 2,226 acres in upland cotton and 255 acres in pima cotton in 2007. However, combined with acreage data now available from TOCMC, the total acreage harvested in 2007, was 8,510, and this number is used to update the 2007 acreage data in Tables 1 and 2. TOCMC acreage data only indicates *harvested* acreage at this time. They anticipate only small losses in harvest from 2007 that would increase their data for total acreage *planted, so the acreage planted has also been updated as well, but is slightly smaller than actual acres planted, as complete data is not available*. In addition, the OTA survey identified 510 acres planted by TOCMC members that were lost to weather, which could

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possibly be added to the TOCMC data to show some of what was planted above the harvest totals for 2007.

Survey results concerning certified organic cotton acres indicate that in 2008 the farmers planted 2,590 acres of organic upland cotton and 245 acres of organic pima cotton, totaling 2,835 acres. Data from non-TOCMC members was added to TOCMC data for the 2008 total in Tables 1 and 2.

To maintain the confidentiality of each farmer, the data do not specify acreage grown on a per state basis, with the exception of Texas. According to the 2008 survey, 2,170 acres of 2008 organic cotton were identified as planted in Texas, with 665 acres grown in California and New Mexico. A very small number of the responding farmers grew color-grown organic cotton in 2007 or 2008; the exact number is withheld, again, for the sake of confidentiality.

As indicated in Table 1, planted acreage increased by 9% from 2007 to 2008. The table shows a general upward trend starting in 2004. However, from a broader perspective, 2008 acreage is a 62% decrease from peak production in1995 (from earliest available data) when total acres in production equaled 24,625. In ten years, planted acreage has decreased by 1%. Data from 1990 to 2002 is provided by OTA's *2003 Beltwide Presentation* referred to in the reference section below. Data from 2003 to present is from annual OTA survey reports during that period, and 2007 and 2008 planted acreage also includes total acreage data from TOCMC. To avoid duplication with TOCMC data from both 2007 and 2008, survey responses from TOCMC members concerning 2007 and 2008 acreage were not Included In the acreage analysis.

When organic cotton fields are not planted in cotton, responding farmers plan to grow the following organic crops on those same fields: five will grow cover crops; four peanuts; four wheat; three corn; two rye; two millet; one tomatoes; one soy; one peas; and one a wide assortment of crops including seed crops (lettuce, broccoli, cilantro, mustard, basil seed), black beans, basil, grazer, sesame, and garlic. One other grows either a cover crop or leaves the land fallow.

Responding farmers *harvested* 1,971 acres of organic cotton in 2007. Harvested acreage totaled 1,716 acres of organic upland cotton and 255 acres of organic pima cotton. Three indicated a decrease due to weather, although data from one of three showed no decrease. Another farmer noted lygus insect pressure but again the data showed no decrease in harvest. This represents a 66% decrease from the 5,811 acres harvested in 2006. However, with the TOCMC 2007 acreage added to survey respondents who are not TOCMC members, the total harvested acreage in 2007 equaled 8,510. This may or may not be a change because TOCMC harvest acreage data from 2007 is not yet available.

BALES HARVESTED

Table 3 features the total number and details of 2007 harvested *bales* of organic cotton identified through this farm survey and the TOCMC data. Survey data show a total of 3,312 bales of organic cotton harvested in 2007, with 2,817 bales of upland cotton and 495 bales of pima.

For 2007, TOCMC reported a total of 12,306 bales of organic upland cotton from Its farmers, in contrast to, 5,944 bales recorded by TOCMC in 2006. TOCMC believes that the 107%

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increase in bales reflects excellent weather conditions in 2007, in contrast to the drought experienced by TOCMC members in 2006, as reflected by the low harvest in that year.

Data analysis of the survey results and TOCMC data showed a total of 13,530 harvested bales of *upland* cotton for 2007. Texas harvested the largest number of bales, with New Mexico and California harvesting significantly fewer bales. Because of the small number of farmers in the survey population, the harvest data is not provided on a state-by-state basis to ensure the confidentiality of farmers who responded to the survey.

In addition, 495 bales of organic pima cotton were harvested in 2007.The total harvest of both organic upland and organic pima cotton in 2007, therefore, was approximately 14,025 bales, as indicated in Table 3 below.

Table 3. Harvested bales of organic cotton in 2007

Source of data on harvested bales	**Total bales harvested**
TOCMC organic upland cotton data	12,306
OTA farm survey organic upland cotton data, excluding TOCMC-member organic upland cotton data in the survey	1,224
OTA survey organic pima cotton data	495
Total harvested bales of organic cotton in 2007	**14,025**
Total harvested bales of organic cotton in 2006	8,116
Percent Change bales harvested 2006-2007	**+73%**

Comparing the 8,116 total bales harvested in 2006 to the 14,025 total bales harvested in 2007, the total number of bales increased by 73% in 2007. This is likely the most accurate reflection of the overall change in production in organic cotton over time because it reflects data from all TOCMC members. TOCMC data on acreage was unavailable in 2006; therefore, any comparison between 2006 and 2007 *acreage* data may not be valid. On the other hand, trends in bales harvested over the years reflect both survey and TOCMC data since at least 2003, and are therefore the most accurate reflection of production trends. Trends on harvested bales are as follows in Table 4 below, based on prior OTA surveys and the *Beltwide Presentation* in the reference section. Preliminary TOCMC data show an estimated 6,500 to 7,500 bales produced in 2008, reflecting a difficult weather year.

Table 4. Harvested bales of organic cotton 2001-2007

Year harvested	**Total bales**
2007	14,025
2006	8,116
2005	9,360
2004	6,814
2003	4,628
2001	9,897

[Note: No 2002 data available.]

Sales & Marketing

Six farmers responding to the survey indicated that they sell their organic cotton directly to a farmer cooperative such as TOCMC (five of these indicating 100% sales to a cooperative; the other left the percentage blank). Two sell their organic cotton to a merchant/trader, one selling 100% to them, the other a majority. One uses the organic cotton for its own product line, one sells a small percentage directly to retailers, and one sells all of Its organic cotton directly to a mill.

Farmers use the following marketing techniques: all ten farmers use word of mouth to market, four simply checking “word of mouth” as a general category. Within the "word of mouth" category, eight specified other means of selling: three checked the “other” subcategory under “word of mouth” but did not provide more details. Within the “other” subcategory, one grower specified using an association, conventional buyers and cotton meetings. Two use TOCMC and one used a cotton merchant. Three who use “word of mouth” checked the subcategory of “referrals from resource people,” and one who uses “word of mouth” markets through referrals from other farmers. One markets by adverting in newspapers and magazines, and another by exhibiting at trade shows, fairs and other public events.

Two sell 100% of their organic cotton in the U.S., one sells 95% to the domestic market (but did not account for the remaining 5%), one sells 20% domestically and 80% internationally. Six farmers checked that the farmer cooperative to which they sell their cotton determines the percentage of organic cotton sales for export; one of these six also indicated that it sold 100% in the U.S. market. One respondent is not sure to which market his product is sold. TOCMC plans to sell 20 to 25% of its 2007 organic cotton internationally, and the remainder domestically.

Five responding farmers know where their organic cotton gets processed, two do not and three are not sure. When asked where their organic cotton is processed, responses were as follows: two at U.S. cooperatives, two internationally (in Pakistan, China, and Japan), and two at U.S. mills. Some of the farmers responding to this question indicated that their organic cotton was processed in several places; the remainder left this question blank. Four said that at least some of their organic cotton is processed organically, while one was not sure.

Three respondents indicated that competition from international organic cotton producers presents their biggest challenge in getting their organic cotton to market. Two do not produce enough organic cotton to meet buyers’ needs. One has trouble finding buyers, and another has challenges “finding mills that utilize organic cotton.” One farmer has the challenge of finding a mill to take a small organic job.

Farmers indicated the following when asked what their greatest barriers are to *planting* more cotton in 2009. Five checked the “other” category, providing the following responses: “Weeds, no growth regulator, insects.” “Finding buyer, weed problem.” “Boll weevil eradication program.” “Land availability.” “Lack of water, drought, and unreliable water deliveries.”

Three cited production challenges: “Time, management, labor.” “Lower yield and competing crops that are more profitable.” “Rain—had drought in 2008.” One indicated that finding a market that will pay value-added costs for the organic cotton is difficult, and one checked, “No challenges.”

The survey analysis indicates that the average price per pound farmers receive generally increases from the previous year. Prices ranged from $0.85 to $1.25 for organic upland cotton in 2006, compared to $1.00 to $1.50 for 2007 organic upland cotton. Organic pima cotton prices ranged from $1.05 to $3.00 in 2007, compared to $1.65 to $2.09 in 2006.

The average price per pound that farmers received for organic upland cotton *seeds* ranged from $0.20 to $0.42 in 2007. Six of the seven upland producers who replied to this question received between $0.20 and $0.235 per pound. Pima farmers responding got $0.25 per pound for seeds.

Farmers suggested the following changes to the national organic standards to enhance their ability to market organic cotton: “Allow sodium chlorate for defoliation.” “Allow new seed varieties that are grown conventionally—poor choices and seed quality of organic produced seeds.” “Continue allowing acid-delinted cotton seed for planting.” “Make the field level in regards to the Chi-organic or overnight organic imports.” “Having a database of mills that use organic long staple cotton.”

Educational and Economic Resources

The survey continues to reveal educational and economic challenges and opportunities related to organic cotton production. Two respondents checked that cooperative extension offices are not knowledgeable about organic production. One respondent believes that they are somewhat knowledgeable on the subject, while another views them as very knowledgeable. As in 2005 and 2006, only two respondents work with their local cooperative extension agents on organic farming issues; six checked that they do not work with extension.

Four farmers indicated that there has not been an increase at extension in educational resources about the National Organic Program since last year. Only two have seen an increase since last year, and two were not sure.

Farmers have stayed current with organic standards using the methods indicated in Table 5 below, with most farmers staying informed through their certification agencies or by communicating with other farmers.

Table 5. How farmers stay current with organic standards

Methods for staying current with organic standards	# Respondents
Certifying agency	4
Communicate with other farmers	4
Check related web sites: 1-TX Dept. of Ag. & OMRI	3
Use Organic Trade Association resources	2
Read trade publications	2
Use cooperative extension resources	1
TOCMC	1
Not specified	1

Organic cotton farmers have used a range of government agencies and programs for information or funding in relation to organic production. Three responses fell into the “other” category: Texas Department of Agriculture, cooperative extension, and the non-governmental California Alliance of Family Farmers. Another farmer tapped multiple resources: the Farm Services Agency, the Natural Resources Conservation Service, and the organic certification cost-share program. The other respondents left this question blank.

Farmers stated that they could use help from USDA for their organic production. Five would

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like research, with two specifying the following types of research needed: “weed control,” and “development of more organic tools: organic herbicide, mechanical weeders, more research into soil health.” Three indicated the following needs under the “other” category: “transitional grants,” “none,” and “information or database of other companies using or working with long staple cotton.” Two farmers requested conservation funds, and one asked for market data, specifically, “historical organic cotton price.”

Farmers rated USDA as very effective (one respondent), somewhat effective (two respondents) and not effective (two respondents) in addressing their concerns on organic production. Three checked, “Does not apply/ Not sure.”

Responding farmers work with the following certifiers: seven use the Texas Department of Agriculture, and the remaining farmers use California Certified Organic Farmers or the New Mexico Organic Commodity Commission.

When asked what would prevent conventional cotton farmers from adopting organic farm practices, they responded as follows:

- “Not wanting to accept risk with organic crops.”
- “Too difficult compared to conventional Roundup Ready production system.”
- “Inability to spray crops.”
- “Been farming that way forever; don’t want to change. Don’t like change.”
- “Having to change.”
- “Weed control. Insect control.”
- “Production costs, fluctuation in prices.”
- Cost of producing the organic crop and not having the knowledge of the process for certification.”

Respondents provided the following replies when asked what would entice farmers to adopt organic farm practices:

- “High prices.”
- “$2.00/#”
- “Price difference should but doesn’t.”
- “Change of mentality.”
- “Nothing.”
- “Credit sources.”
- “Price per pound of the organic cotton.”

Two farmers know other cotton farmers who are interested in converting their farms to certified organic farms, and two know cotton farmers who have adopted certified organic farm practices on conventional farms in the past year.

When asked, considering all sectors of the organic industry, from farm through retail, what could be done to improve support for the long-term economic sustainability of U.S. organic farms, farmers made the following comments:

- “Have a USA organic hang tag—ID/logo.”

- “All the focus on agriculture is on GMO, Roundup Ready crops, so seed companies and manufacturers cater to them.”
- “Buyers slow to pay.”
- “Market prices and better technologies to remain profitable and stay small.”
- “Storage.”
- “Credit programs.”
- “Sustainable price.”

Farmers suggested the following ways to improve USDA programs regarding organic production: “give us good crop insurance options for organic crops,” “inspect organic imports,” and “not sure.”

Survey respondents provided the following additional comments for helping OTA promote the profitable production and marketing of organic cotton in the U.S.: “Promote organic cotton as an alternative for synthetic fibers—not always fighting conventional cotton.” “More markets.” “Assisting the farmers in finding and contacting users of the organic cotton crops produced.”

Future Projections, General Trends & Conclusions
Survey data show an overall upward trend of planted organic cotton acreage since 2003, totaling a 129% increase from that year.

Three farmers plan on increasing their organic cotton production in 2009, four plan on no change, and three are not sure of their plans. In 2009, three farmers project a total increase in organic cotton acreage of as much as 290 acres above 2008 planted acreage of 9,279. (Note: projected increases for farmers with cotton out of rotation in 2008 were based on their 2007 acreage data.)

New TOCMC data this year provides transitional acreage. For 2008, they tallied 2,133 acres in transition to organic. An additional 230 transitional acres were identified from qualifying surveys that are not TOCMC members. However, this included all production in transition to organic and did not specify organic *cotton* acreage, so the specific amount of acreage in transition to organic cotton cannot be determined.

Over the next five years, three respondents project a total increase in planted organic cotton acreage of about 449 acres. A majority will be planted in organic upland cotton. This increase reflects the following feedback from farmers: “Demand is good at present time.” “Farm is growing.” One explained that, “Any change would be due to lack of water needed to grow the organic cotton. We don’t know until February or March if there will be enough water available to grow the crop. If we have the same amount of water allocation as this year or a wet winter, we will keep our organic crop acreage the same.”

Total bales harvested continue to be the most accurate reflection of production data because TOCMC has historically tracked that data from all of its members and not all TOCMC members responded to this survey. TOCMC believes that the sizeable increase in harvest from 2006 to 2007 among TOCMC farmers reflects the fact that many of their farmers do not have irrigation and that 2007 was a terrific growing year. It had abundant rain and a warm fall, in contrast to 2006, a dry year. Production of harvested bales among TOCMC members increased by 107% from 2006 to 2007, while total harvested bales of organic cotton production increased by 73%, according to analysis of survey data in combination with TOCMC data.

In 2008, TOCMC preliminary data show a significantly smaller harvest than 2007 of 6,500 to 7,500, bales of organic upland cotton, because of difficult weather.

Organic upland cotton prices in 2007 increased from 2006, with the average price per pound ranging from $1.00 to $1.50 for organic upland cotton in 2007, compared to $0.85 to $1.25 for 2006 organic upland cotton. Organic pima cotton prices ranged from $1.05 to $3.00 compared to $1.65 to $2.09 in 2006. If the market sustains consistently higher prices, it may support an expansion of organic cotton production, as may be currently reflected by the projected increased acreage, some of which is already in transition to organic.

Organic cotton production in the U.S. has shown an increase in *planted* acreage in the last two years and consistent increases since 2003, although the overall acreage is still well below peak production acreage of 24,625 planted in 1995. Given the number of acres in transition and the modest increase in organic cotton acreage predicted by farmers over the next five years, projections show acres planted with certified organic cotton could increase within the next five years to approximately 12,000, a 29% increase from 2008.

For organic cotton production to maintain this upward trend and entice farmers to transition to organic, farmers expressed the need for sustainable organic cotton prices. Several mentioned concerns about the integrity of imported organic cotton which they compete against in the marketplace. Production challenges also came up a number of times, specifically regarding weed and insect control. Overall, farmers often mentioned the need for better markets and tools for accessing those markets.

The web site, www.HowToGoOrganic™.com, is one such tool that is now available to support both established organic producers and farmers interested in transitioning to organic production. The Organic Trade Association has developed this online clearinghouse of website links to guide farmers to a wide array of resources including marketing opportunities, production advice and supplies, regulatory links, pricing data and much more.

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