



**INTERNATIONAL TEXTILE MANUFACTURERS FEDERATION
FEDERATION INTERNATIONALE DES INDUSTRIES TEXTILES
INTERNATIONALE VEREINIGUNG DER TEXTILINDUSTRIE**

Phone +41 (0)1 283 63 80, Fax +41(0)1 283 63 89

Spinners Committee

Travel Report

Australia

April 28 – May 2, 2003

From April 28 to May 2, the ITMF Spinners Committee visited Australia with the objective of being updated as regards the latest developments in this most sophisticated of cotton producing countries, and to discuss the problems that are now being encountered.

The Committee started the week in Narrabri, visiting the newly-opened Australian Cotton Centre, the ginning operations at the Auscott Cotton Farm, and participated in meetings with members of the Australian Cotton Industry Council and Raw Cotton Marketing Committee. At the Australian Cotton Research Institute (ACRI) the Committee participated in a field-to-fabric workshop, and visited agronomic research installations. At Wee Waa the recent installations of the new Australian Classing Services (ACS) were inspected, ACS having commenced its first season as an independent classing organisation. The Committee also called upon the headquarters of Cotton Seed Distributors, a grower owned, non-profit producer of commercial cotton planting seed. Finally in Brisbane the Committee participated in a meeting with the members of the Australian Cotton Shippers Association.

The Committee would like to put on record its appreciation to all those involved in the preparation and execution of the tour and in particular to Mr. Galmes, the long-standing member of the Spinners Committee from Australia who, on conclusion of the visit, was elected Honorary Life Member of the Committee, having resigned from active membership last year.

Participants

Committee Members & Secretariat

Ziad Bashir	Pakistan	Gul Ahmed
Romano Bonadei	Italy	Filartex
Juan Gallarde	Spain	La Preparación Textil
Robert M. Galmes	Australia	Bonds Industries
Jung Soo Kim	Korea	Ilshin Spinning Co.
Andrew Macdonald	Brazil	Santista Têxtil S.A . & Committee Chairman
Walter Simeoni	South Africa	Frame Textile Corporation
Annas Sukarmadji	Indonesia	PT Apac Inti Corpora
Herwig Strolz		Director General ITMF



Impressions and Observations

The lack of water for irrigation, which has led to a sharp reduction of production in Australia as well as the rising of the micronaire values, is a concern shared by the Committee. An improvement in nep count has been noted, but the Committee agreed that this is more likely to be due to the coarser micronaire than to any other outstanding factor. The Committee sensed, however, clearly the desire of all the various segments in the cotton pipeline to work towards improvements of these and all other aspects of Australian cotton. Particular attention was paid to the increasing importance of micronaire, neps and short fibre content for the modern cotton spinning industry. The Committee felt that it must stress that to make this common goal more effective, it will be necessary for all segments to seek closer contact and to promote a better dialogue, especially between farmers, merchants and spinners. During the workshops and discussions, the Committee found too many contradictory expressions between what spinners require and what farmers are getting paid for. Perhaps the greatest challenge to Australian cotton lies in improving the relationship between the essential segments in the chain, so that the present antagonisms may eventually be turned into a win - win situation for all. Bearing in mind the overall reduction in production, and the need for Australia to explore niche markets, a co-operative approach is paramount to bring to fruition the work that is being undertaken at the research level. This excellent work was heavily underscored by the workshops attended by the Committee at the ACRI, where subjects ranging from “Ginning for Quality” to “Neps in Ginning”, “Ginning Overall”, “Interlab Trials on Fibre Quality”, “Commercial Round Robin Tests”, “Polarized Light and Laser Scan Technology” and others, were presented.

The ITMF Spinners Committee was given an opportunity at these workshops to present views on how the present cotton marketing system will need to be changed to allow for an improved system of compensation of all of the segments in the pipeline, be it in terms of pricing and/or quality.

The Chairman of the Committee, Mr. A. Macdonald, discussed and presented a paper on “Market-based incentives for improving cotton quality” and Mr. Romano Bonadei (Italy) on “The evaluation of cotton on the basis of the HVI Short Fibre Index”.



Cocktail after meeting with Australian Cotton Shippers Association

Market-based incentives for improving cotton quality

The full text of Mr Macdonald's presentation will be found in [Annex 1](#). In resumé, the presentation was designed to show the relationship between the basic intrinsic characteristics of cotton, and how some characteristics are able to offset those which might be less desirable, by using the standard CSP results available on HVI instruments. The aim was to suggest that this type of valuation, based on the real spinning value of cotton, should become the basis for premiums and discounts for cotton, rather than the current and clearly out-of-date system, led by the USA loan schedules. These schedules were introduced long before the advent of HVI, when cotton was judged almost exclusively on its "look", colour, spot, and preparation. Staple length and micronaire were added features, based on the then current spinning technology. Today's technology far exceeds this current system which does not properly remunerate the grower for those characteristics that the spinner needs such as strength, uniformity and maturity, nor discounts those characteristics which are extremely prejudicial to the industry today like neps and high short fibre content. The presentation generated much discussion and the request for guidance as to how to go forward with these ideas. The Committee suggested that Australia was an excellent origin to pioneer the application of these concepts, and move away from depending on the United States' outdated traditions, which only benefit the grower and ginner and serve to frustrate the spinner, who in turn is becoming more inclined to move to man-made fibres where such problems are not to be found.

Evaluation of cotton on the basis of the HVI Short Fibre Index (SFI)

Mr Bonadei's full presentation is to be found under [Annex 2](#). It basically demonstrates substantiated proof that the SFC indicated on the current HVI instruments does have a meaningful value for the spinner.

In resumé, Mr Bonadei's conclusions were:

- In opening, cleaning and carding, waste losses are similar for all cottons.
- In combing, the high SFI cottons give higher quantities of comber noils.
- There is a good correlation between the amount of comber noil and the monthly average value of HVI SFI.
- Yarn quality is adversely affected by short-fibre content, as represented by the HVI SFI, even when the corresponding short fibre is removed during the combing process.
- HVI SFI can be considered a good indicator of short fibre content for commercial purposes.

Mr Bondadei also showed the effects of stickiness, in yarn breaks, thick and thin places in the yarn, as well as the efficiency of winding.

Regarding neps, Mr Bonadei who uses mainly Australian cotton pointed out that he personally is not so badly affected by this problem as he has all his cotton custom-ginned without the use of the lint cleaners. He pays a premium for such cotton to compensate the seller for the lower commercial value due to the non-removal of all the trash. However as he points out he has machinery to remove this trash under much more favourable conditions.

Conclusions:

The Committee was unanimous in pointing out on the occasion of both the ACRI workshops and the meeting with the Australian Cotton Shippers Association that in order for all segments in the cotton pipeline to benefit, the cotton marketing system must be changed from its present grade and staple orientation to one which pays a price for the true value of cotton. If such a system were in place, growers would be guided to seek quality premiums and avoid parameters detrimental to the quality-conscious spinners, such as: -

- high micronaire,
- high nep content,
- high short-fibre content,
- stickiness and
- low length uniformity.

For example, micronaire, with an average value of 4.6 for 51% of the cotton grown in 2003, implies that Australia is today missing the premium for cottons for yarns finer than Ne 40's.

With quality requirements in the textile pipeline rising all the time, neps are becoming an increasing problem, even in the 40's count and lower range, where they cannot be totally eliminated in the carding process.

Australia recognised at an early stage the detrimental effects of contamination, and practically eliminated the problem, and now Australian cotton should take the lead again when it comes to the development of a new marketing system based on the spinnability of cotton. Given today's high-speed testing environment with HVI and other testing instruments that have subsequently come on the market, it has become possible to quickly identify the true value of cotton for the spinning industry. This includes parameters so far not universally traded, such as neps, short fibre, maturity and stickiness.

The ITMF Spinners Committee as a group, and individually through its members, places itself at the disposal of the Australian cotton industry in the endeavour to work towards yet another break-through in the history of the modern cotton industry, and would like to encourage all those interested in making use of this offer.

May 2003