



ACSA

AUSTRALIAN COTTON SHIPPERS ASSOCIATION

MARKET REPORT - OCTOBER 2025

UPDATE

As we head into the final quarter of 2025, ginning across most regions will finish during October – and it's now up to merchants to move the unsold cotton into export markets. In this regard India has been the most active destination, though with the current duty-free exemption set to expire at the end of December, the shipping window is rapidly disappearing.

Besides India, there's little news to report on the marketing front. The same macro influences continue to dominate: persistent global headwinds, no major crop scares and ongoing speculative selling. Spinners remain cautious, buying hand-to-mouth - and under the circumstances, who can blame them? While this isn't uncharted territory, the monotony of trading within the 65 to 70 cent range is wearing thin and a change in momentum would be welcome.

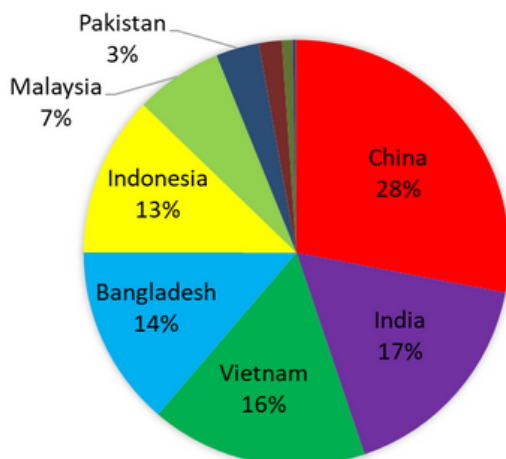
You may have seen recent media coverage about microplastics and their impact on both the environment and human health. Our colleagues at the National Cotton Council (USA) have published an insightful article on the topic (www.plantnotplastic.org).

Please take a moment to read the article and share it through your own networks, particularly with those outside our industry. We already understand the sustainability strengths of natural fibres like cotton - the real opportunity lies in helping a broader audience recognise the environmental and human impacts of microplastics and the important role that responsibly grown natural fibres can play in addressing them. Each of us can be an advocate, professionally and personally, by using our voices to inform conversations beyond the cotton industry.

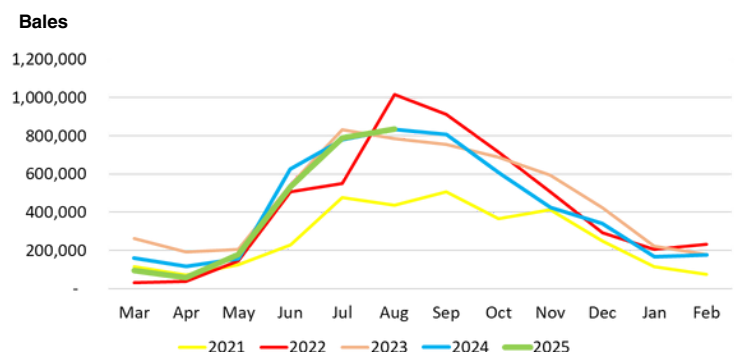
Cliff White
Chair

AUSTRALIAN COTTON EXPORTS

2025 SEASON YTD SHIPMENTS - to August 31, 2025

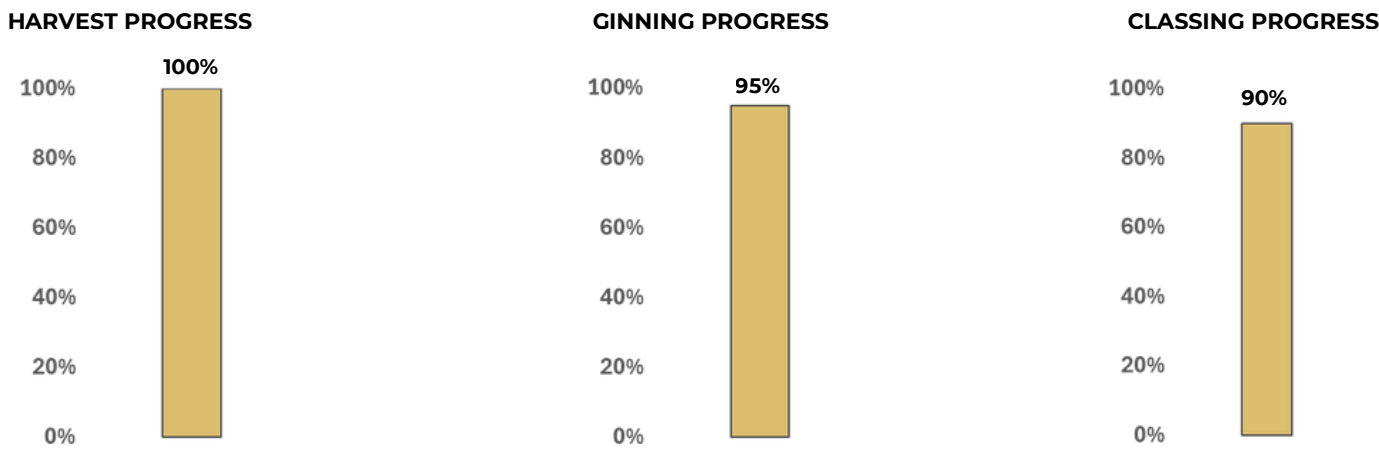


HISTORICAL SHIPPING PACE



CROP UPDATE

- Harvest complete
- Ginning anticipated to be complete by early October
- Planting commenced in Central Queensland with growers in other regions considering 2026 plantings



Source : Data from industry estimates

COLLABORATION IN ACTION

By Jules Willis

The Australian Cotton Shippers Association (ACSA) has kicked off an exciting new chapter for the post farm-gate sector, launching four dedicated committees to drive collaboration and deliver solutions that matter.

The committees - Classing & Quality; Freight & Warehousing; Ginning; and Sustainability & Traceability - bring together expertise from across the post farm-gate sector to tackle shared challenges and deliver outcomes that strengthen the Australian cotton industry.

Classing & Quality

Building on decades of valuable contribution and achievement from the Cotton Classers Association of Australia, this Committee is raising the bar through national best practice guidelines and by keeping pace with global developments and requirements. Their work will include creating resources to improve industry-wide understanding of classing processes and quality factors, as well as investigating opportunities to streamline data flows so cotton moves more efficiently through the supply chain.

Freight & Warehousing

Focused on some of the sector’s biggest supply chain pressures, this Committee is working to improve visibility of cotton movements, refresh bale handling and chain-of-responsibility guidelines, and address freight scheduling challenges head-on. Their goal is to make logistics safer, faster and more predictable.

Ginning

This committee is putting people and sustainability at the forefront. Work is underway to secure formal recognition of ginners as trade-qualified professionals, strengthening workforce pathways and safeguarding the skills base for the future. The group is also exploring how sustainability data should be measured, the opportunities for benchmarking and comparison, and the potential for a carbon benchmarking framework tailored to ginning operations.

Sustainability & Traceability

Supporting the Australian cotton industry in staying ahead of evolving market expectations, this committee is engaging with CRDC and KPMG to ensure post-farm gate needs are embedded in the industry’s data platform. It is also progressing quality guidelines for module wrap and developing a communication strategy to deliver clear, consistent messaging on traceability and sustainability requirements.

Together, these committees represent a bold step forward for ACSA and the post farm-gate sector. They highlight the power of collaboration in action - turning challenges into practical outcomes that drive efficiency, deliver value across the supply chain and build a more connected and resilient Australian cotton industry.

MEET YOUR SUPPLY CHAIN PARTNER

Australian Food & Fibre (AFF) is a regionally based, vertically integrated agribusiness that focuses on producing Australia's highest quality sustainable cotton for international markets.

As well as being one of Australia's largest cotton growers, with farming operations located in all of NSW's major cotton growing valleys, the business also operates modern cotton ginning, warehousing and classing facilities to process their own, and their grower customers' cotton to valued markets around the world.

AFF's extensive range of facilities allows them to maintain control of their supply chain and ensure accurate accountability and traceability of their product from the paddock to spinning mill. The business prioritises producing cotton in an ethical, sustainable manner and recognises the need to continue adapting their practices to further improve their efficiencies and impact on the environment.

AFF is a local minded business that works to support the communities in which it operates in, including partnering with local growers to produce some of the world's best cotton.



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