



THE
DEMOGRAPHICS
GROUP

Australian Cotton Conference

How cotton is shaping up

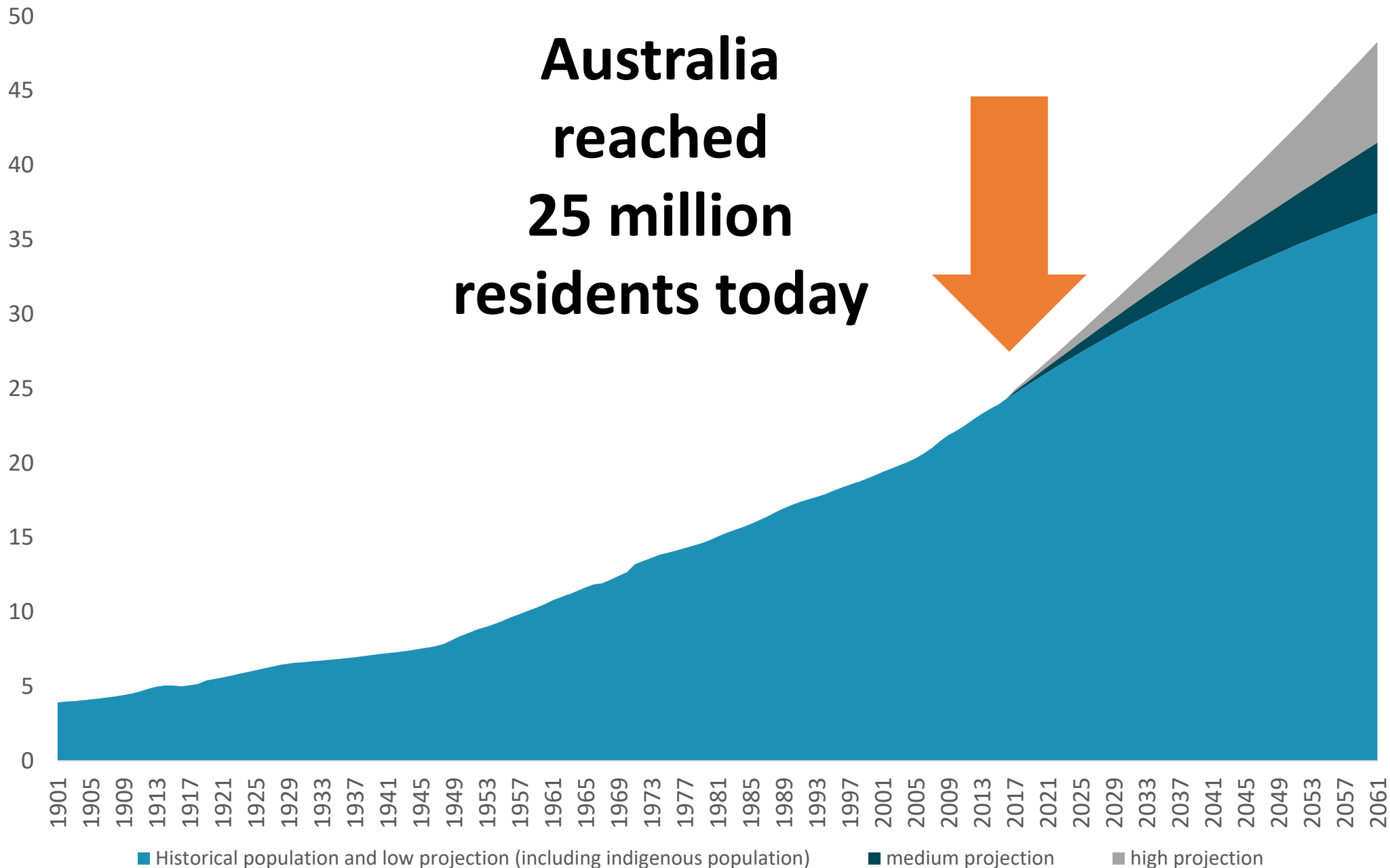


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7 August 2018

Australia at 25 million

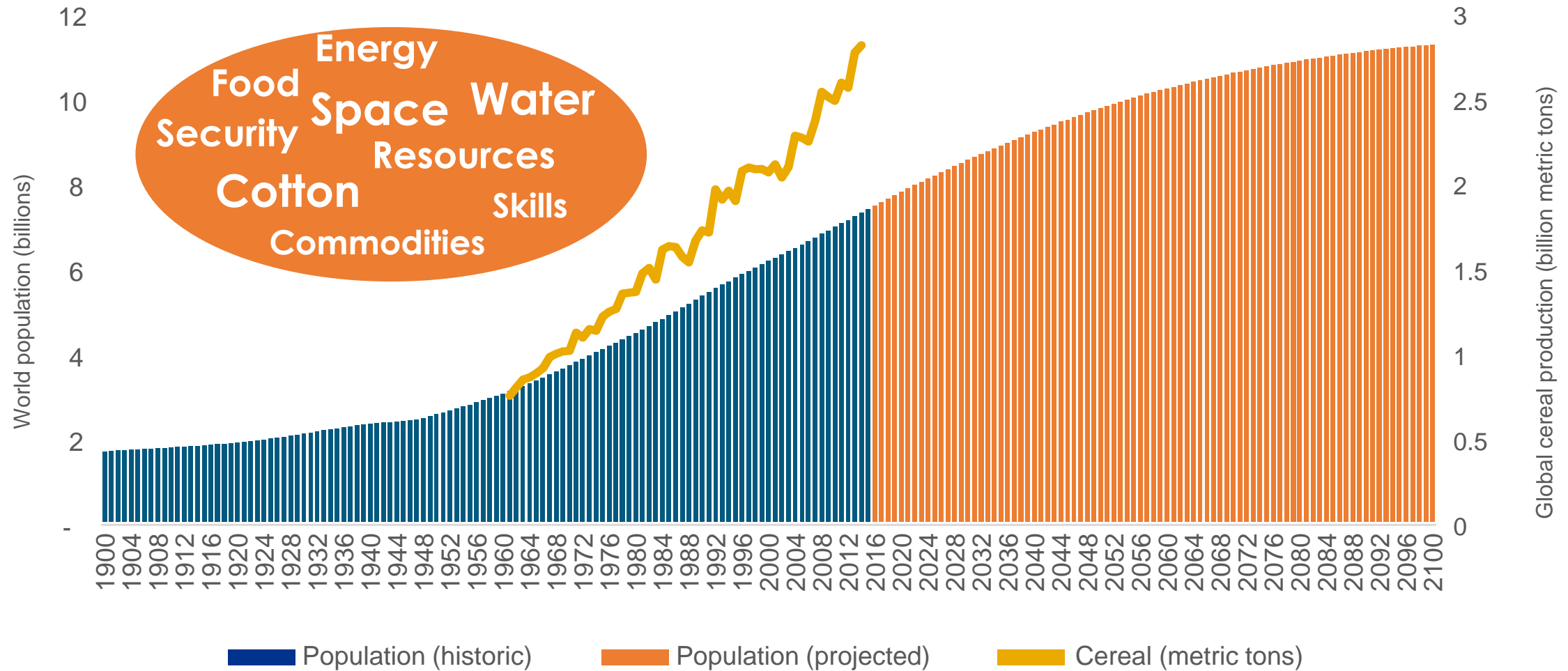
Australia reached 25 million residents today



Historic population and the low, medium and high ABS population projections until 2061

Source: ABS

Australia has what the rest of the world wants



Agribusiness is at the forefront of disruption



17 years Australia November quarter 2017 – up 3.6m (8.7m – 12.3m)

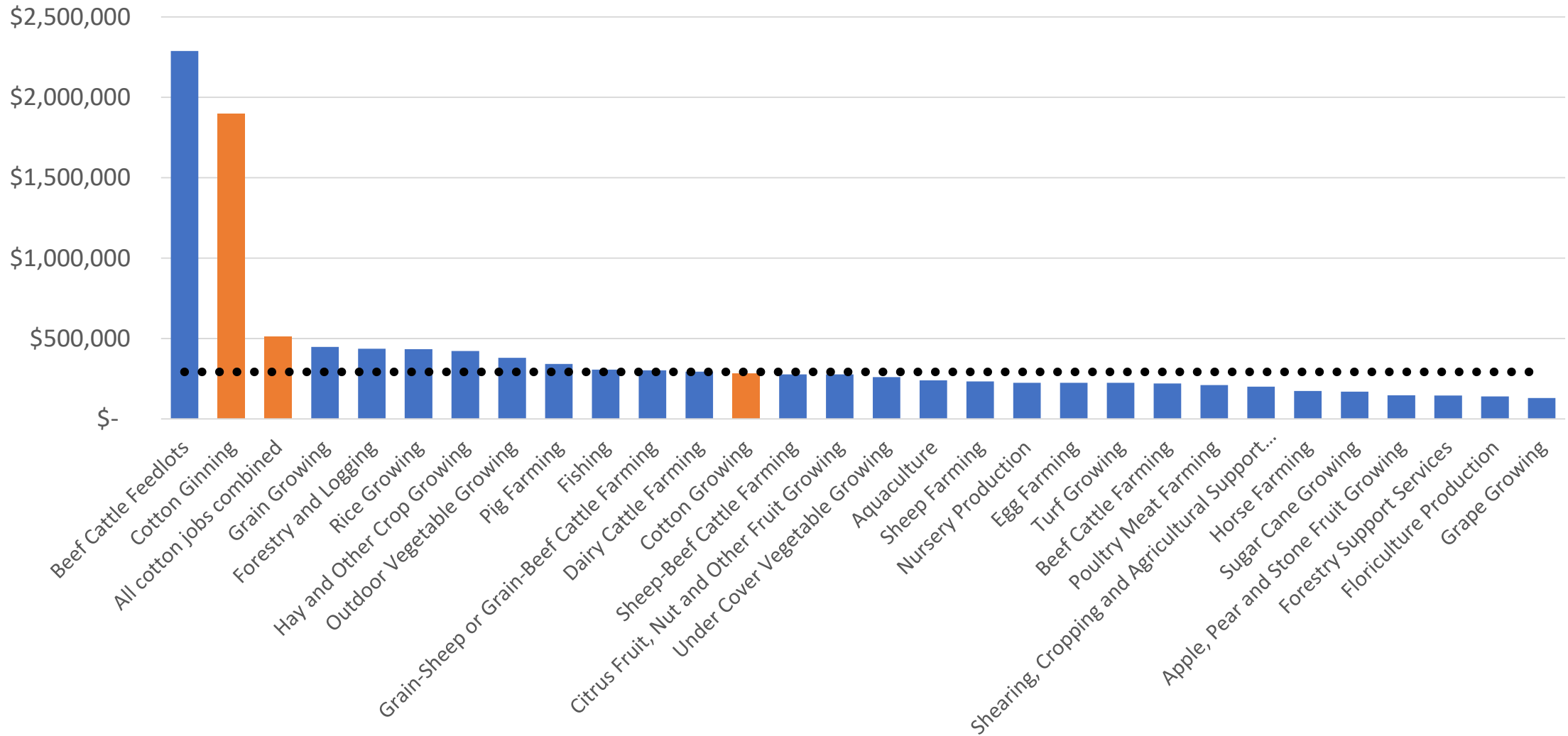
Mechanisation and farm aggregation drives change

Farming job	2016	2011-16
1. Beef Cattle Farmer	28,300	-11%
2. Mixed Crop and Livestock Farmer	23,000	-34%
3. Dairy Cattle Farmer	11,200	-14%
4. Grain, Oilseed or Pasture Grower	11,000	+11%
5. Sheep Farmer	9,700	-10%
6. Fruit or Nut Grower	7,700	-12%
7. Mixed Livestock Farmer	6,200	-44%
8. Vegetable Grower	6,200	-10%
9. Grape Grower	4,100	-18%
10. Sugar Cane Grower	3,100	-18%

Farming job	2016	2011-16
11. Poultry Farmer	2,600	0%
12. Mixed Crop Farmer	2,100	-7%
13. Aquaculture Farmer	1,700	-1%
14. Apiarist	1,200	+18%
15. Horse Breeder	1,200	-16%
16. Flower Grower	1,000	-26%
17. Pig Farmer	800	-15%
18. Cotton Grower	400	-30%
19. Turf Grower	400	-27%
20. Goat Farmer	200	-26%

Net change in employment by farmers and growers in Australia over 5 years to 2016

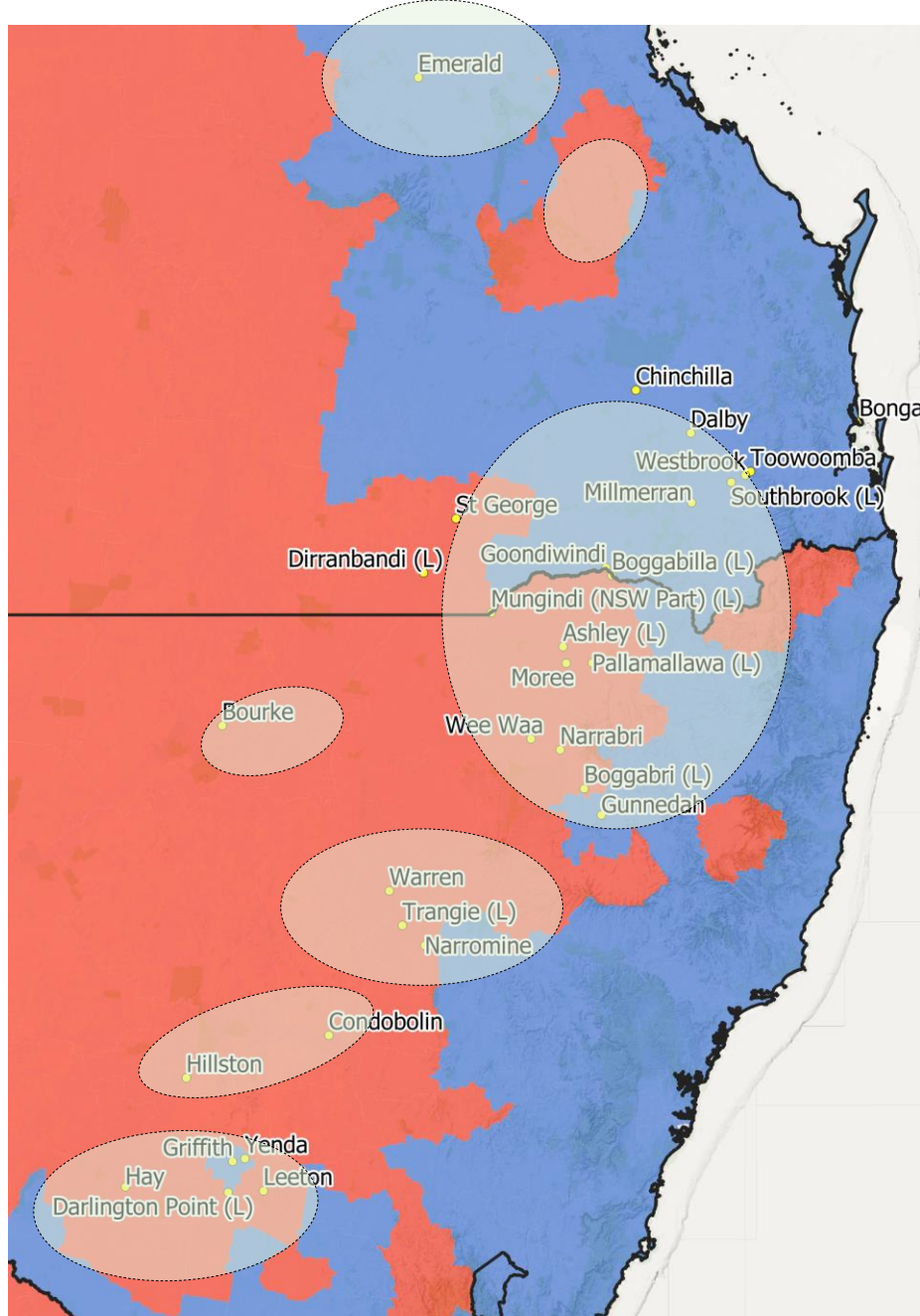
Cotton is a hyper productive industry



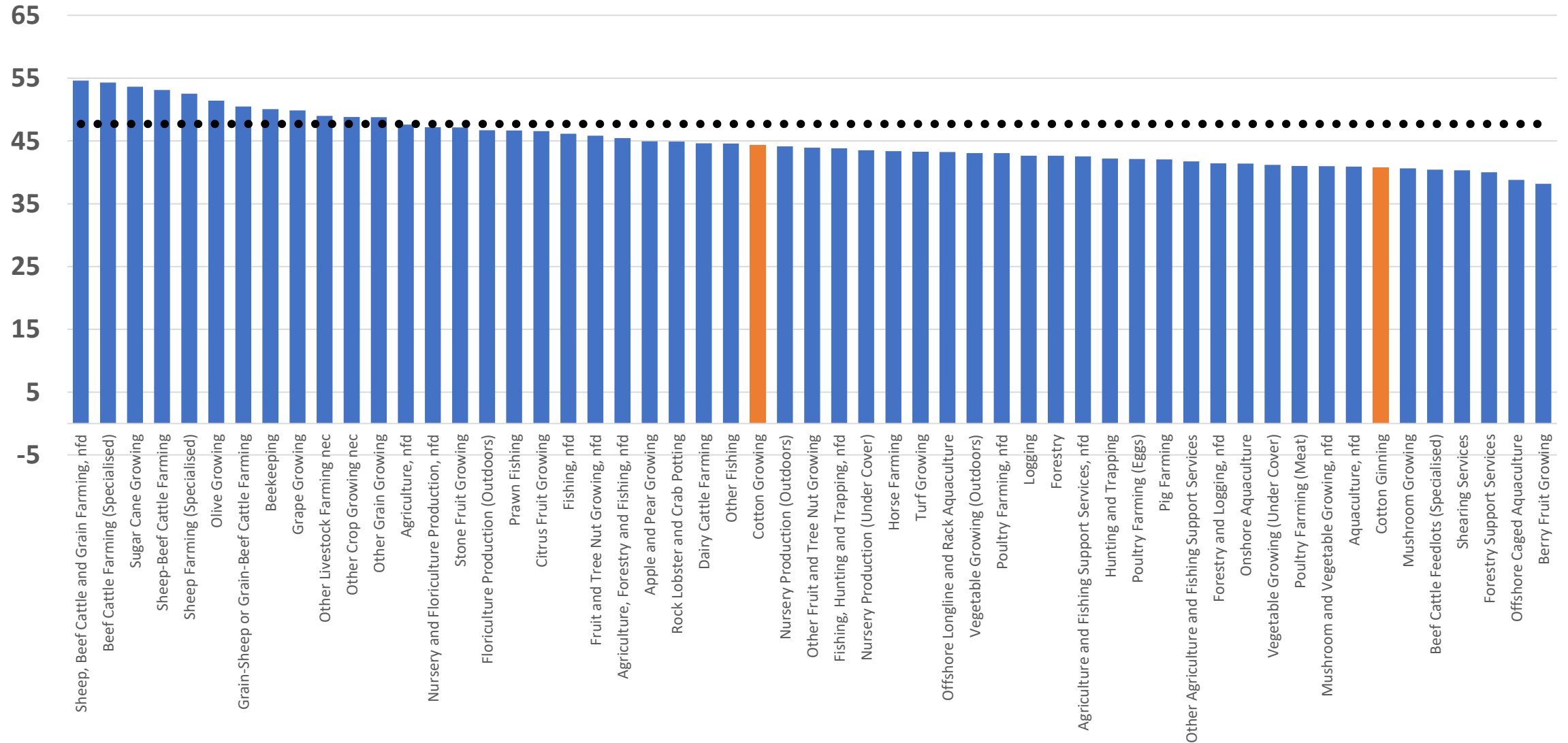
Revenue per worker by industry in the agricultural sector, 2018 estimates by IBIS World

Cotton towns: a diverse bunch

- 40 LGAs grow cotton
- 1500km from Emerald to Hay
- Diverse communities
- Diversified communities do better
- Proximity to large towns helps

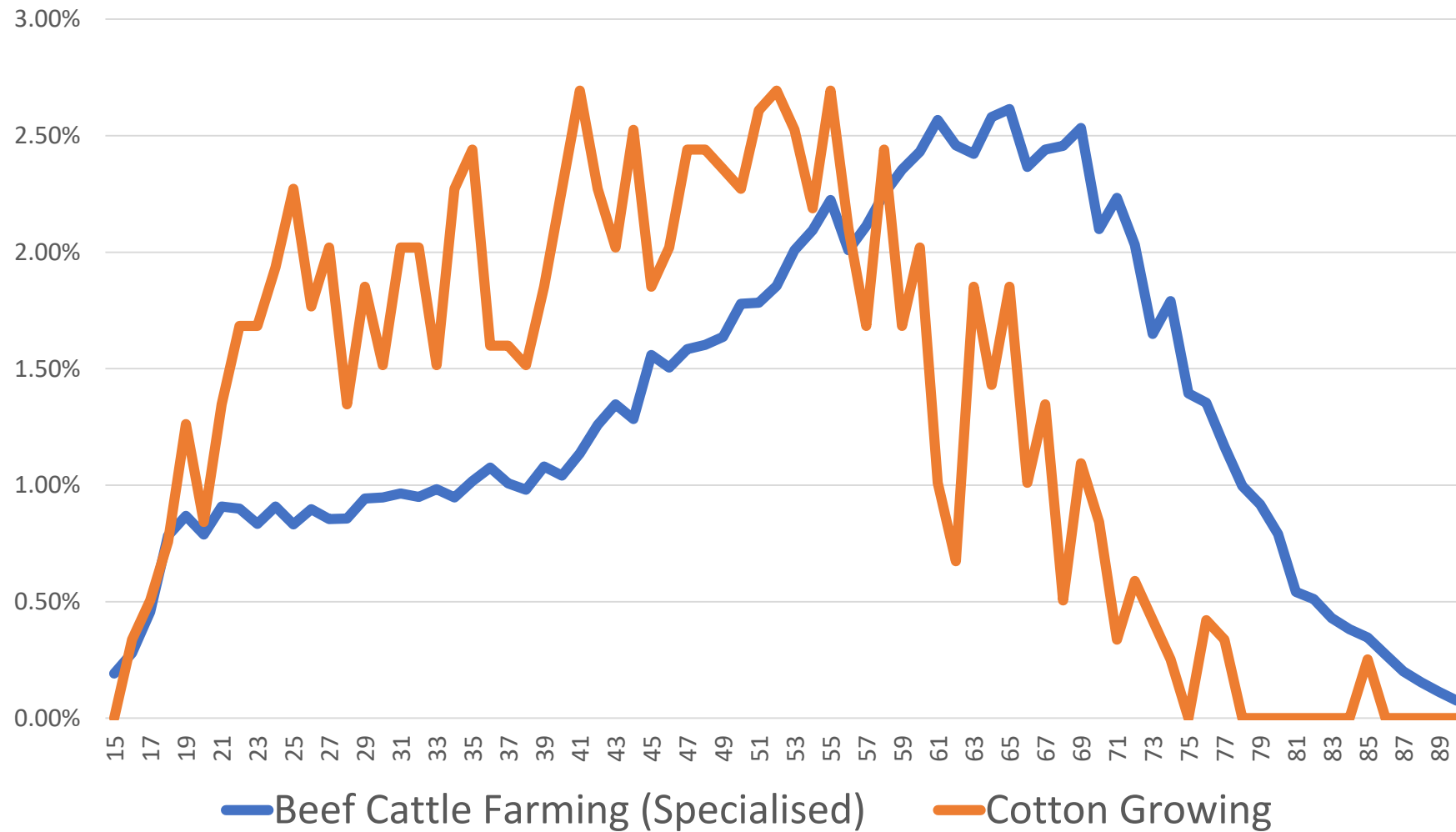


Cotton is a young industry with a modern mindset



Average age of workers by agricultural industry in 2016

Succession planning not as pressing of an issue ...



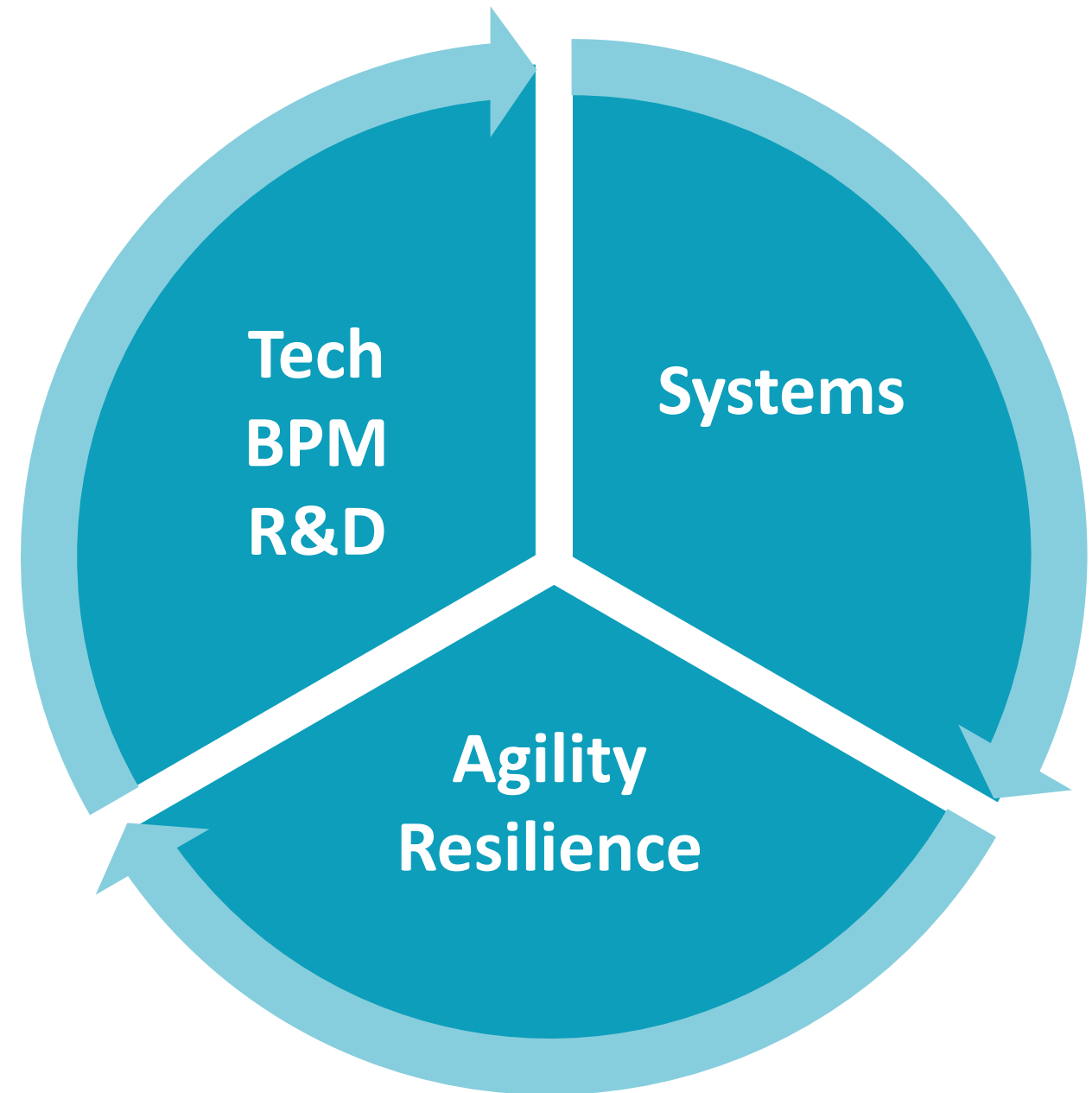
Average age profile of beef cattle farmers and cotton growers as of 2016

Future-proof the cotton industry

- Update technology
- Harvest ideas (best practice)
- Deep integration of R&D

- Maintain social license
- Networking and advocacy

- Embrace (not fear) change
- Systems to strengthen agility



Let's connect on social media



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