2008 SOUTHWEST YEAR IN REVIEW

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Texas producers planted 4.9 million acres in 2008 which was similar acreage to 2007. In the east/south Texas regions about 714,000 acres were planted in 2008. Transgenic varieties accounted for 90% of the state acreage in 2008 (87% in 2007). According to the USDA-Agricultural Marketing Service "Cotton Varieties Planted 2008 Crop" survey for the Texas classing offices, the following varieties were planted:

Abilene (Oklahoma Data)
~35% FiberMax, 20% Deltapine
FM 1740B2F 20%, DP 143B2RF 19%, FM 9063B2F 13%, DG 2100B2RF 6%, DP 164B2RF 1%, FM 960B2R 1%, Other 35%

Abilene (Texas Rolling Plains Data):
~42% FiberMax, 16% Deltapine
FM 9063B2F 17%, FM 960B2R 13%, DP 143B2RF 7%, FM 960B2 6%, DP 164B2RF 6%, FM 1880B2F 5%, All-Tex Atlas RR 4%, ST 4554B2RF 3%, DP 444BG/RR 4%, Americot 1532B2RF 3%, DG2100B2RF 1%, Other 31%

Corpus Christi:
~60% FiberMax, 17% Deltapine
FM 840B2F 15%, FM 832 14%, FM 835LLB2 10%, DP 555BG/RR 8%, FM 832LL 7%, FM 955LLB2 7%, FM 958LL 4%, DP 143B2RF 4%, DP 444BG/RR 3%, DP 164B2RF 3%, FM 960B2R 2%, FM 820F 2%, Other 22%

Lubbock:
~70% FiberMax
FM 9058F 27%, FM 9063B2F 19%, FM 9180B2F 12%, DP 164B2RF 7%, FM 958 6%, NexGen 3550RF 4%, All-Tex Apex B2RF 3%, FM 958LL 2%, FM 9060F 2%, FM 9068F 2%, DP 104B2RF 1%, FM 989B2R 1%, Other 14%

Lamesa:
~63% FiberMax
FM 958 21%, FM 9058F 19%, FM 9063B2F 14%, FM 989B2R 9% FM 960B2R 5%, FM 1880B2F 3%, FM 9060F 3%, DP 104B2RF 3,%, Americot 1532B2RF 3%, ST 4554 3%, DP 143B2RF 2%, FM 960BR 2%, Other 16%

A continuing substantial adoption of transgenic varieties was noted in the region in 2008. Based on technology types, the following various transgenic planted percentages specifically identified for each classing office location. The classing offices reported a large "other" designation, and most likely indicates that certain technology types may have been planted on a larger percentage of the acreage than indicated.

Roundup Ready Flex
Lubbock: 77%; Lamesa: 48%, Abilene (OK): 63%, Abilene (TXRP): 41%, Corpus Christi: 23%

Liberty Link
Corpus Christi: 28%

Bollgard 2 (includes B2, B2RR and B2RF)
Lubbock: 44%; Lamesa: 40%, Abilene (OK): 65%, Abilene (TXRP): 61%, Corpus Christi: 40%

High input costs for irrigation, diesel, pesticides, fertilizer, etc. resulted in considerable economic pressure on the region's producers. In the southern part of Texas, 2008 was characterized as very dry through boll fill, followed by late season rainfall which was fairly common across the areas. Crop loss in the Coastal Bend due to poor stand establishment associated with extremely dry seedbed conditions was about a 100,000 acres. Hurricane Dolly affected the Rio Grande Valley and the Coastal Bend crop. Hurricane Dolly made landfall in the Rio Grande Valley on July 23 and devastated the Valley crop. The majority of the 91,000 acres in the Valley was lost and the northern

fringe of Dolly damaged the lower Coastal Bend crop, but the crop remained harvestable. Some yield and quality loss was experienced.

Hurricane Ike made landfall near Galveston on September 13 and moved northward along the Interstate 45 corridor. Although Ike delivered serious damage to southeast Texas, the cotton crop in central Texas sustained minimal damage from rain and wind. Irrigated producers in the Brazos River Valley that initiated irrigation prior to flowering and maintained irrigation throughout boll fill made record yields – Arizona-type environmental conditions few cloudless days, textbook boll set. Due to drought conditions 2008 was a poor production year compared to 2007 as well as the past several years.

In the High Plains region and for most of the Rolling Plains, the early part of the year was very dry, with some rainfall obtained in early May. Cotton planting was delayed by the rainfall and was somewhat behind normal. In late May and early June, high temperatures and high wind velocities resulted in substantial losses of dryland cotton. Approximately one million acres were lost due to these conditions. Many dryland fields in sandy western and southwestern counties blew out or were badly damaged. Significant numbers of dryland fields lost sufficient moisture to be released based on non-emergence. Blowing dryland fields on south and southwest sides of irrigated fields sifted onto the irrigated and caused some damage. Many subsurface drip acres had difficulty with stand establishment. Overall cotton heat unit accumulation by month for Lubbock was as follows: May 14% above normal; June 22% above normal; July 4% below normal; August 3% below normal; and September 22% below normal. September and early October delivered excessive rainfall, causing difficulty maturing crop and triggered low micronaire problems, especially in District 1N. On October 23rd a freeze occurred across most of region. These late environmental conditions resulted in highest bark contamination in many years.

In Oklahoma, planting began in early May, but rain and cool weather delayed major planting until around May 10. Most cotton was planted by the end of the month and stands were quickly obtained. Very windy weather occurred during early June and some occasional severe thunderstorms affected stands by mid June. Seedling cotton was stressed by wind, blowing sand, and hail. Approximately 7-10 percent of the acreage was lost during mid to late June.
Precipitation ceased in early July, and plants with stressed root systems affected by June weather suffered during flowering. Some locations had timely rainfall during mid to late July, while areas in the northern part of the cotton production area were severely limited in rainfall. In early to mid August, a general rainfall provided relief in all areas, but fruit shed due to moisture stress occurred in most dryland areas. A warm September and October was needed to mature the crop that was left, and for the third year in a row, favorable fall weather occurred. Although harvest was delayed in most areas, yields were much better than anticipated.

Overall crop production for the states was projected as follows:

Texas
2007 - 4.9 million planted acres, 4.7 million harvested acres, 843 lb/acre, 8.25 million bales
2008 - 5.0 million planted acres, 3.4 million harvested acres, 649 lb/acre, 4.6 million bales

Oklahoma
2007 - 175,000 planted acres, 165,000 harvested acres, 817 lb/acre 281,000 bales
2008 - 170,000 planted acres, 155,000 harvested acres, 805 lb/acre, 260,000 bales

Kansas
2007 - 47,000 planted acres, 43,000 harvested acres, 639 lb/acre 57,000 bales
2008 - 35,000 planted acres, 28,000 harvested acres, 686 lb/acre, 40,000 bales

When considering the entire region, crop production was projects as follows:
2007 - 5.122 million planted acres, 4.908 million harvested acres, and 8.59 million bales
2008 - 5.205 million planted acres, 3.583 million harvested acres, and 4.90 million bales.

The 2008 crop's quality was also significantly reduced compared to the record year of 2007. Staple was down at Corpus Christi and Abilene classing offices, but slightly higher at Lubbock and Lamesa. Color grades were also somewhat lower, with 41 predominating at Corpus Christi in both years, and 31 dominating at Abilene, Lubbock

and Lamesa, down from 21 in 2007. Micronaire was higher at Corpus Christi in 2008 at 4.7 compared to 4.4 in 2007. Abilene's classing results indicate a similar micronaire for both years (2007 - 4.1, 2008 - 4.2). Lubbock and Lamesa both reported significant reduced micronaire due to cool fall conditions with averages dropping from about 4.2 in 2007 to around 3.6 in 2008. Average strength was similar in both years, with 2008 values at 29.7 g/tex. Uniformity was similar in both years, with 2008 averaging around 80.5 at all classing offices except Corpus Christi, which was higher at 81.4. Percent bark contamination was among the worst in many years for the High Plains classing offices, with Lubbock and Lamesa reporting about 65% and 48%, respectively. The Abilene classing office was substantially lower at about 14%, and Corpus Christi reporting only about 4% bark contamination. The 2008 crop year was difficult in this region, with harvested acreage, bale production, and quality substantially down compared the record year of 2007.