

## **COUNTRY STATEMENT: GREECE**

Cotton used to be and still is considered as a national product of Greece. In this aspect great attention has been given, starting from the first step of production till the final product. This major agricultural crop with long tradition in Greece, accounts for almost 6% of total agricultural land and about 43,000 cotton farmers in the country. Cotton is grown mostly between 35<sup>0</sup>N and 38<sup>0</sup>N latitude. The main cotton production regions in Greece are located in Central and Northern Greece and more specifically in Thessaly, Central Macedonia, Thraki and Sterea Ellada.

The plains where cotton is cultivated have mostly alluvian soil, which is suitable for cotton. Several non biotech varieties of *Gossypium hirsutum* are successfully grown in Greece.

The bigger part of cotton areas are irrigated (60%) and a smaller percentage (40%) is grown under dry land conditions. All stages of cultivation process are fully mechanized.

Greece worldwide is one of the most significant countries in cotton production (13<sup>th</sup> place) as well in cotton exports (7<sup>th</sup> place) –USDA September 2023.

**Cotton Interprofessional Organization (ΔOB, [www.hca.org.gr](http://www.hca.org.gr))** is consisting of producers and ginners, was established in 2016 and approved by the decision of the Minister of Rural Development and Food dated 29-02-2016/1178/25334, which is replaced in the framework of the new EU Common Agricultural Policy (CAP) 2023-2027 by the 23-02-2023/127/5788. Its main objective is the development of cotton cultivation with the production of cotton adapted to the needs of the market with an update of cultivation methods and development of marketing strategies through quality certification systems as cotton is one of the first exportable products of our country.

From the day of its foundation, it has managed to produce a targeted project with its main purpose which is none other than increasing the added value of the product and improving Greek cotton farming for the benefit of all by strengthening several actions that promote the value of cotton farming. In this context ΔOB:

- Controls 1% of the quality of Greek Cotton
- It controls the seed-produced varieties in Greece
- It updates through events, across Greece, the results of the above programs
- Participates in the Technical Committee for the drafting of Standards and Guidelines related to the Integrated Management System
- It participates with its representatives in all important conferences, events throughout Greece for the promotion of cotton
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## **Cotton Research**

The Ministry of Rural Development and Food has the responsibility of coordination of cotton research in Greece. The Ministry of Rural Development and Food approves and funds special agricultural programs for the development of new cotton varieties. Most of the programmes are assigned to ELGO DIMITRA [www.elgo.gr](http://www.elgo.gr) which is a public sector organisation that enjoys administrative and financial autonomy and is supervised by the Ministry of Rural Development and Food. The institutes of ELGO DIMITRA that deal with cotton research are:

1. **Institute of Plant Breeding and Genetic Resources (IPBGR)** is located in Thessaloniki. Main research targets include the preservation, evaluation, and exploitation of genetic resources and the development of new cultivars with improved yield, quality, and adaptation. [www.ipgrb.gr](http://www.ipgrb.gr)
2. **Institute of Industrial and Forage Crops** is located in Larisa, Centre Greece. The institute focuses on innovation, research, knowledge diffusion, technology and advisory services on soil/water resources, plant production, pest management and good agricultural practices. [www.ipsw.gr](http://www.ipsw.gr)
3. **The National Centre for Quality Control, Classification and Standardisation of Cotton** and its laboratories in Karditsa and Orchomenos, are in the division of the Institute of Industrial and Forage Crops of the ELGO DIMITRA. The centre provides services in quality control of cotton for the manufacturing industry (ginning), cotton seed companies, cotton merchants and other customers. It participates in international inter-laboratory tests (CSITC, BCRT, 7 tests / year).

## **Variety Approval and Seed Supply**

The Variety Research Department of Cultivated Plants (VRICP) is responsible to examine all varieties that are intended to be cultivated in Greece. The procedure and methodology followed for registration of conventional varieties of field crops and vegetables are in accordance with general and specific technical rules harmonised with the Community Instructions 2002/53(70/457) and 2002/55 (70/458). Every cotton variety is examined in the cotton belt, for two years by the VRICP and compared with check varieties. The agronomic and quality data are checked on the basis of standard Rules and Regulations from the committee of the Ministry of Rural Development and Food. The committee proposes which variety is suitable for cultivation in Greece and after that the variety is registered in the National Catalogue. After registration, the variety can be cultivated in Greece and in the European Union countries for ten years. [www.varinst.gr](http://www.varinst.gr)

The ELGO DIMITRA is the only public organisation that is mandated for seed propagation and seed supply to farmers, but its share in national cotton market is very low. The main supply

systems are catered by the private seed companies who propagate cottonseeds and also import cotton seeds. The private companies promote seeds through agronomists and sell the seeds through private stores. The seed companies in Greece are members of Greek Seed Trade Association ([www.sepy.gr](http://www.sepy.gr)) and a majority of them deal with cotton.

For 2022 the main varieties and their distribution across the country are presented at the table below:

Name of the Variety	% Area
<b>Varieties in Thessaly</b>	
CELIA	14,4
ST 402	12,3
ELPIDA	11,7
HERSI	10,1
<b>Varieties in Makedonia</b>	
ST 402	30,9
ST 318	16,2
ARMONIA	5,9
ELPIDA	5,4
<b>Varieties in Thraki</b>	
ST 402	13,6
ST 318	13,5
ELSA	7,6
ST 474	6,1
<b>Varieties in Sterea Ellada</b>	
ST 402	33,4
ELPIDA	16,2
ARMONIA	8,9
LIDER	7,9
<b>Varieties in Others</b>	
FLORA	30,5
CARLA	30,5
ST 402	8,7
DP 396	5,7

### **Fertiliser and Pesticide Supply**

In Greece there are both industries that produce fertilisers and companies that import fertilisers from abroad, mainly from Europe. Farmers buy fertilisers, seeds and pesticides from private stores. Farmers buy pesticides and other plant protection products mainly from private stores and cooperative stores.

### **Campaign 2022/2023**

Cultivated area reached nearly 253,967ha during campaign 2022/2023 which was about 3% decreased compared to last year and the production of seed cotton was about 915,335 metric tn (5% more than the previous year) from which some 321,553 metric tn of lint cotton were produced. There were not any serious problems concerning cotton bollworm (*Helicoverpa armigera*) or other crop enemies. In an otherwise normal season a reduction of the quantities of fertilizers and pesticides applied was observed, due to the significant increase in their costs after the invasion of Russia in Ukraine. Our country applies successfully a scheme of “integrated pest management” for cotton crops on a regional level which is massively accepted by the producers.

Generally, the quality of cotton during campaign 2021/2022 was good enough.

As regards farmers’ income the average price of seed cotton was 0.76€ per kilo, which was the highest price in the last 15 years.

### **Campaign 2023/2024**

As regards campaign 2023/2024 the cultivated area is nearly 230,500 hectares (area controls are not completed yet) which is about 9% lower to last season and the lowest in the last 15 years. The extremely bad weather conditions (Medicane DANIEL and later ELIAS) during harvesting season (September 2023) led to flood, production losses and degradation of cotton quality in the regions of Thessaly, which represents a big part of cotton cultivated area (about 1/3). Fields filled with mud will be difficult to plow and sow for the new year. Prices for pre-sales during this period range from 62.5 cents per kilo plus the quality premium. It is at lower levels compared to the price given by the gins before the Elias rains which was at 64 cents per kilo.

Also, dry conditions and high temperature on July and August are expected to lead to a significant drop to yields and it is estimated that new crop’s production (seedcotton) will be about 450,000-500,000 metric tons. Harvesting has started and ginning mills have begun the production of lint cotton.

For further information, statistical data from the 10 most recent cotton seasons is presented in the table below.

Year	Area (,000 ha)	Production (seedcotton) (,000 tn)	Price (seedcotton) (€/kg)	Consumption (,000 tn)	Production (lint cotton) (,000 tn)	Yield (seedcotton) (Kg/ha)	Producers
2010	257.0	557	0.60	35	182	2170	
2011	285.7	796.5	0.50	25	227	2790	
2012	279.5	776.5	0.42	21	250	2780	
2013	248.7	852	0.50€	20	296	3430	
2014	271.2	814.3	0.40-0.42		273	3000	
2015	262.9	658.6	0.42-0.44		219	2510	
2016	234.3	680.5	0.51		232	2910	
2017	255.6	756.0	0.49		255	3040	43,309
2018	273.0	858.1	0.49		293	3140	
2019	291.5	1044.2	0.44		360	3580	48,298
2020	276.5	914.8	0.42		315	3310	45,627
2021	261.2	869.2	0.66		295	3330	43,773
2022	253.9	915.3	0.76		322	3600	42,966

Greece's CAP strategic plan, under the framework for the new EU CAP and according to Reg. (EE) 2021/2115) which applies for the period 2023-2027, includes an intervention which aims to strengthen the sustainability and competitiveness of cotton cultivation and is implemented through the granting of specific support per hectare of eligible cotton area. The amount of the cotton aid is 733,98 €/hectare for base area of 250.000 hectares and total budget 184 million €. If the reference area is exceeded, the aid shall be reduced proportionately. It should be noted that in the last 5 years the base area (>250 000 ha) has been exceeded which results in a proportional reduction of the coupled aid.