COUNTRY STATEMENT OF PAKISTAN

FOR 79TH PLENARY MEETING OF

INTERNATIONAL COTTON ADVISORY COMMITTEE

TO BE HELD FROM 06-09 DECEMBER, 2021 AT WASHINGTON, DC, USA.

DIRECTORATE OF MARKETING & ECONOMIC RESEARCH
PAKISTAN CENTRAL COTTON COMMITTEE
MINISTRY OF NATIONAL FOOD SECURITY & RESEARCH
GOVERNMENT OF PAKISTAN

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Cotton, a major cash crop of Pakistan, is considered the backbone of the national economy. It contributes about 0.7% to GDP and 3.5% of total value addition in agriculture. Pakistan is the fifth largest producer, third largest consumer and second largest exporter of cotton yarn in the world. Export of cotton and textile products have a share of 57% in overall exports of the country. The current tariff policy is one of free trade and there are no restrictions on either import or export of cotton.

2. Cotton is grown by more than 1.3 million farmers on around 3.0 million hectares which is 15% of the cultivable area of Pakistan. Cotton production in Pakistan during 2020-21 remained lower at 7.064 million bales of 170 Kg. The main causes behind this decline were climate change, untimely rains, and high temperature especially in the month of August and September which caused loss in flower shedding, pest attack of whitefly, Pink boll worm and shortage of irrigation water resulted loss in production. The cotton production during the current season 2021-22 is satisfactory and expected that the target of 10.5 million bales will be achieved. This is owing to favorable weather and better prices factor which favored the cotton production. Cotton is consumed largely by more than 500 textile mills in the country although a significant quantity of up to 1 million bales is also exported. However, to meet the demand for extra-long staple cotton, about 3-4 million bales are imported annually.

3. In Pakistan, research on cotton has been given prime importance and a number of organizations are conducting research on various aspects of cotton. Pakistan’s research setup is contributing significantly by releasing more than 100 elite and new cotton Bt varieties within the set standards of fiber quality and National Coordinated Varietal Trials for last 10 years. Planning and coordination of Cotton R&D Programs among Federal and Provincial Cotton Research Institutions is being strengthened to increase cotton production, improve yields per hectare, evolve disease resistant varieties, promote Bt cotton cultivation and improve overall quality of cotton.

4. There are 1200 cotton ginning factories are in operation in Pakistan. The ginning industry operates in 80-120 saws type. However, the majority of ginning factories have saw gins of 90 saw blades type. The production capacity of ginning industry in Pakistan ranges from 12 million bales to 35 million bales. The Government is taking some serious steps to upgrade this sector of the
industry. Establishment of cotton standards through Pakistan Cotton Standard Institute (PCSI), setting up of a Ginning Institute in public sector are positive steps towards the right direction.

5. The future cotton policy envisages a number of strategies which include revision of rules for variety approval, germplasm improvements, development of hybrid cotton, much improved and better farm and crop management, bringing additional area under cultivation, especially in the provinces of Baluchistan and Khyber Pakhtunkha, and minimizing post-harvest losses. Cultivation of organic cotton is also being encouraged, particularly in the virgin, fertile and pest free lands of Baluchistan. Necessary legislative and regulatory frameworks have been strengthened. Seed Act has been amended and rules have also been formulated. Plant Breeder’s Act has also been passed by the parliament of Pakistan & plant registry has been made functional to ensure the plant breeders rights. The National Cotton Research and Development system is being streamlined with the involvement of all the key stakeholders to bring it at par with international standards. The Government is also encouraging multinational and national technology providers for introducing latest and effective insect protection technology.
COUNTRY REPORT OF PAKISTAN
FOR 79TH VIRTUAL PLENARY MEETING OF
INTERNATIONAL COTTON ADVISORY COMMITTEE
TO BE HELD FROM 06-09 DECEMBER, 2021 AT WASHIGTON,DC,USA.

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COUNTRY REPORT OF PAKISTAN FOR THE 79TH PLENARY MEETING OF INTERNATIONAL COTTON ADVISORY COMMITTEE TO BE HELD FROM 06-09 DECEMBER, 2021 AT WASHINGTON, DC, USA

1. Introduction:

Cotton is an important cash crop and is the primary source of raw material for the textile industry of Pakistan. It contributes about 0.7% to GDP and 3.5% to total value addition in agriculture. According to latest report of ICAC, Pakistan is the fifth largest cotton producer in the world after India, China, USA and Brazil. Pakistan's share in the world cotton production in 2020-21 was 5.0 percent. Pakistan is 3rd largest consumer of cotton in the world, the 3rd largest yarn producer, the 2nd largest yarn exporter and the 3rd largest cloth exporter.

Table-1: Cotton Area, Production, Yield & Consumption in Pakistan

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<th>Year</th>
<th>Area (000 hectares)</th>
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<th>Yield (kg per hectare)</th>
<th>Consumption (000 Metric tons)</th>
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<td>1201</td>
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</table>

Source: Pakistan Central Cotton Committee

*Provisional.
Table-2: Exports, Imports & Stocks of Raw Cotton During Last 16 Years

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<tr>
<th>Years</th>
<th>Exports</th>
<th>Imports</th>
<th>Carry-over</th>
<th>Ending</th>
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<td>2020-21*</td>
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<td>857</td>
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<td>25</td>
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*Source: Pakistan Bureau of Statistics, Government of Pakistan
*Note: i) From 2005-06 to 2010-11 data collected as August-July Year.
   ii) From 2010-11 data covers July-June.
   *Provisional
2. Cotton Research Setup In Pakistan

In Pakistan, research on cotton has been given prime importance and a number of organizations are conducting research on various aspects of cotton. Main organizations are:

- Pakistan Central Cotton Committee (PCCC).
- Centre of Excellence in Molecular Biology (CEMB) Punjab University Lahore.
- National Institute of Biotechnology & Genetic Engineering (NIBGE) Faisalabad.
- Nuclear Institute of Agriculture & Biology (NIAB), Pakistan Atomic Energy Commission, Faisalabad.
- Ayub Agricultural Research Institute, Faisalabad.
- Agricultural University Peshawar.
- Nuclear Institute of Agriculture (NIA) Tando Jam, Sindh.
- Department of Agriculture Research, Sindh.
- Sindh Agriculture University Tando Jam.
- Islamia University Bahawalpur.
- Mohammad Nawaz Shareef University of Agriculture, Multan.
- Pakistan Agricultural Research Council (PARC), Islamabad.
- Agriculture Policy Institute, Islamabad.
- Multinational & Private Sector Organizations.

To provide trained human resource to research organizations, six public sector agriculture universities and eight agriculture colleges offer basic and advance courses in agriculture and cotton. In addition, universities with strong biological sciences divisions help in training scientists on various aspects of cotton. The National Textile University and other engineering universities are producing textile engineers for the cotton value chain. These educational and degree awarding institutions have developed linkages with top ranking universities and schools across the globe to be the part of international research teams involved in cotton research.
3. **Annual Research Plan on Cotton (2021-22).**

The Annual Research Plan for the year 2021-22 in Pakistan has been prepared keeping in view the changing climatic conditions, insect pests and decease scenario, effectiveness of Bt gene and cropping patterns. The plan has been thoroughly reviewed and discussed with the scientists of Central Cotton Research Institute, Multan. The research studies will be focused on cotton production technology, high density trails, climate resilient varieties, CLCuV disease management, efficient fertilizer use, seed health improvement, insect pest management (especially Pink bollworm, Whitefly, Mealy bug), insecticide resistance management, introduction and demonstration of advanced machinery including Mechanical Cotton Picker, Boll Picker, Seed Grader etc and technology dissemination.

In addition, a project has been launched for Pink bollworm management (PBW Project) through which farmers will be provided facilities to purchase PB Ropes. Moreover, Boll picker machine designed by CCRI Multan, will also be fabricated and demonstrated at various research stations and farmer’s field. The Better Cotton Production (BCI Project) has also been initiated in Sindh and Punjab Provinces through which farmers will be trained to produce environment-friendly and economically better cotton utilizing the latest technology in collaboration with the Better Cotton Initiative (BCI) Pakistan.

4. **Cotton Breeding Program in Pakistan**

a) **Seed cotton yield and fiber Quality:**

The cotton breeding program in Pakistan strives to develop new varieties equipped with high yield potential, early maturity and high lint percentage, testing of newly developed cotton strains in NCVT & PCCT, preservation/maintenance of cotton germplasm, study of Gene Flow/Out crossing % age, GMOs Testing and other research activities are focused areas of breeding program of PCCC in Pakistan.

The PCCC in collaboration with Seed Councils has developed minimum fiber quality standards which are given prime importance throughout the breeding and variety approval processes.

The fiber quality parameters enforced by Govt. of Pakistan are:

- Fiber length more than 28mm.
- Lint percentage more than 37.5 and above.
- Fineness 3.8 - 4.9 ug/inch.
- Fiber strength 92 and above (tppsi).
- Uniformity ratio more than 48%.
- Fiber maturity more than 80%.

b) **Drought tolerance:**

Because of irregular rains and climate change, water reservoirs are not fully replenished to provide sufficient water for cotton and other crops. This shortage of irrigation water in Pakistan has created a demand for drought resistant/tolerant varieties using upland cotton as well as wild *Gossypium* species which are perennial xerophytes shrubs indigenous to desert areas. The latter requires less water and this characteristic is being transferred to cultivated American types of cotton varieties.

c) **Heat tolerance:**

The cotton growing areas in Pakistan experience high temperatures (over 45°C). High temperatures become harsh for cotton crop in summer season as a consequence of which flower and fruit shedding results reflect in severe yield losses. To avoid this phenomenon, heat tolerant varieties are being developed.

d) **Insects and Diseases resistance:**
The major disease in Pakistan is Pink Bollworm, White fly and Cotton Leaf Curl Virus (Burewala strain of cotton virus) which is a serious threat to the economy of Pakistan. Efforts are being made to develop virus resistant genotypes by transferring disease resistant genes from wild species into upland cotton varieties. Scientists are also working to incorporate some morphological traits, like pubescence which could help in non-preference of insects.

e) Testing and approval of a variety:

The homozygous selected material (strains) is tested in micro Varietal and Provincial Coordinated Cotton Trial (PCCT) then passed through National Coordinated Varietal Trial (NCVT) to be approved as a variety.

Table-3: Year-Wise List of Varieties Evolved in Pakistan and their Fiber Characteristics.

<table>
<thead>
<tr>
<th>No.</th>
<th>Variety</th>
<th>Year of Release</th>
<th>Lint %</th>
<th>Staple length (mm)</th>
<th>Micronaire (ug inch-1)</th>
<th>Strength (tppsi)</th>
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5. **Collection and Maintenance of Cotton Germplasm**

PCCC has also developed sub-zero cotton seed storage facility for long term storage at CCRI Multan that comprises of more than 5000 accessions collected from various national and international resources. The seed of different varieties is preserved for short / long term basis and to be used by researchers to develop new varieties and shared with various local / international organizations / universities for breeding purpose. The detail of cotton germplasm collected and maintained at CCRI, Multan during the year 2020-21 is as under:

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**Species – Wise Detail**

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6. **Standardization**

In order to ensure qualitative improvement in cotton production and marketing, the government has undertaken the following measures:
- Cotton Standardization Ordinance, 2002.
- Cotton Standards Institute has been established.
- National Cotton Grades have been developed and approved.
- Intervention price of seed cotton has been fixed at Rs.5000/ 40 Kg.
- Karachi Cotton Association is now issuing spot rates on grade and staple basis.
- Contamination free cotton production programs were launched with visible success.
- HVI equipped fiber testing labs in major cotton growing districts are working.

7. **Number of Quality Laboratories in the Country**
Pakistan Cotton Standards Institute (PCSI) has set up around 10 fiber testing labs throughout the country duly equipped with High Volume Instrument (HVI). This has helped in testing, evaluation and monitoring cotton fiber quality. Moreover, Pakistan Central Cotton Committee (PCCC) has also set up two quality laboratories at Karachi and Multan for the purpose. Similarly, Synthetic Fiber Development & Application Center (SFDAC), Karachi, Textile Institute of Pakistan (TIP), University of Agriculture, Faisalabad, National Textile University, Faisalabad, Nuclear Institute of Agriculture & Biology (NIAB), Faisalabad, National Institute of Biotechnology & Genetic Engineering (NIBGE), Faisalabad and private sector have also set up quality labs for fiber testing and analysis.

8. **Extension Services**

Pakistan has a well established extension network in each province working under the provincial Agriculture Departments. The extension agents (Agriculture Officers) are supported by technicians (Field Assistants). These Agriculture Departments in coordination with the Agriculture Research wings devise extension programs for cotton and arrange training courses for Extension Agents and Technicians regarding new innovation in cotton production technology. These refresher training programs continue during the cropping and harvesting season as well. In addition to Agriculture Departments, all Cotton Research Institutes and Stations have technology transfer units, where extension agents, progressive farmers, field staff of NGOs and members of civil society are trained about new research based techniques. The research scientists develop extension brochures and participate in field visits to address farmers’ problems. The private sector agro based companies also devise special extension services plans during cotton season in addition to their sale and marketing work.

9. **Cotton Ginning Industry in Pakistan**

The ginning factory plays a pivotal role for determining quality of cotton fibre as raw material for downstream industry. There are 1,221 ginning factories in Pakistan. The ginning industry operates in 80-120 saws type. However, the majority of ginning factories have saw gins of 90 saw blades type. The production capacity of ginning industry in Pakistan ranges from 12 million bales to 35 million bales. The Government is taking some serious steps to upgrade this sector of the industry. Establishment of cotton standards through Pakistan Cotton Standard Institute (PCSI), setting up of a Ginning Institute in public sector are positive steps towards the right direction.

10. **Strength, Weakness, Opportunity and Threat (Swot) in Pakistan**
a) Current Strengths in Cotton Production

Historically cotton has been cultivated in the region for thousands of years. However since independence of Pakistan in 1947, the production of cotton has risen steadily. The area increased from 1.23 million hectares in 1947 to 3.20 million hectares with concurrent production from 1.1 million bales to 14.00 million bales of 170 kg. This phenomenal growth in production is attributed to introduction of high yielding varieties having better fiber quality characteristics, heat tolerant, wider adaptability and introduction of improved cotton production technologies, across the cotton belt.

b) Opportunities Enhancing Productivity

The landscape of cotton research and development is being transformed to Gene Revolution. Many advances have been made at the advent of emerging technologies Genetic Engineering and Molecular Biology. The cultivation of transgenic cotton commonly known as BT (Bacillus thuringiensis) has revolutionized the research and development of cotton crop. The gene transformation technology has paved the way in the development of cotton varieties having in built tolerance/resistance against biotic and abiotic stresses. The application of Molecular Marker Assisted Selection (MAS) technique has put the breeding program on fast track rather than Classical Combining Ability Technique. The frontiers of MAS Techniques have extended to genetic finger printing, introgression of alien genes and identification of chromosomal regions associated with Quantitative Trait Loci (QTL). Furthermore, great opportunities exist in promotion of integrated pest management (IPM) technology with emphasis on biological control through mass release of predators and parasites. This will result in reducing cost of production and environmental pollution.

c) Weakness of Cotton Production

In Pakistan, less-availability of certified seed for the entire cultivated area is the most important weakness. There is a wide yield gap between the progressive and non-progressive growers and this gap needs to be narrowed to the maximum level.

d) Threats for Cotton Production

Despite an improvement in the size of cotton crop, the lower per hectare yield may be attributed to the ravages of Pink Bollworm, White fly and Cotton Leaf Curl Virus (CLCV) disease, poor management practices due to lower crop prices, climate change, irrigation water shortage and small and uneconomic land holdings. Pink bollworm is major threat in Pakistan. It has caused a huge economic loss to cotton crop. Strategies to combat Pink bollworm taken by Pakistan Central Cotton Committee (PCCC) are elaborated as below:

11. Strategies and Programs By PCCC to combat Pink Bollworm
Pakistan Central Cotton Committee (PCCC) along with provincial agricultural department launched a comprehensive program to combat infestation of Pink Bollworm and to educate farmers in order to save the next cotton crop. National seminars were conducted and farmer meetings were arranged at the door step of the growers.

a) **Short Term Strategy**

Pakistan Central Cotton Committee conducted around 100 seminars and farmer meetings at different places throughout the cotton belt of Pakistan. The immediate objective of the meetings with farmers was to create awareness and adopt some general practices which are beneficial and can help in reducing growth of Pink Bollworm. Following were the main points of the short term strategy:

- Field Survey to analyze current problems faced by farmers
- Management of Sucking insect pest
- Monitoring and Management of Pink Bollworm
- Management of transgenic cotton by cultivation of refugia crops
- Use of ICT applications for effective technology transfer
- Awareness campaign by extension department
- Human Resource development
- Keep the sticks in upright position, in small bundles and in sunlight during May-June
- Cutting of sticks, plough-up and irrigate field immediately after harvest
- Dispose off the ginning waste lying in the ginning factories
- Early planting should be prohibited (not before May)
- Use certified seed
- Always use seed delinted with sulphuric acid
- Ratoon cotton should not be allowed
- Pest scouting twice a week and apply insecticide only when insect threshold level achieved
- Careful pest scouting by observing small bollworms larvae.

b) **Medium & long term strategies**

- Acquiring cotton germplasm from abroad.
- Induction of Advanced technologies in Cotton R&D.
- Cotton variety development under the changing climate scenario.
- Monitoring climate change and its impact on cotton production.
- Evolution of transgenic cotton varieties resistant to.
  a) Cotton leaf curl virus.
  b) Bollworms and sucking pests.
  c) Water stress.
d) High temperature.
e) Salinity.
   ➢ Pink Bollworm & Whitefly Management Strategies.
   ➢ Shifting towards High Density Cotton Planting.
   ➢ Strengthening research facilities of cotton research institute and their satellite research stations.
   ➢ Cotton promotion in new potential areas (KP & Balochistan).
   ➢ Maintenance & Screening of 6123 cotton varieties for CLCuV, Heat & Drought.
   ➢ Human Resource Development.

The future cotton policy envisages a number of strategies which include germplasm improvements, development of hybrid cotton, much improved and better farm and crop management, bringing additional area under cultivation, especially in the provinces of Baluchistan and Khyber Pakhtunkha, and minimizing post-harvest losses. Cultivation of organic cotton is also being encouraged, particularly in the virgin, fertile and pest free lands of Baluchistan. Necessary legislative and regulatory frameworks are being strengthened or created like the Plant Breeder’s Act and Seed Act. Similarly, the national cotton research and development system is being streamlined with the involvement of all the key stakeholders to bring it at par with international standards. The Government is also encouraging multinational and national technology providers for introducing latest and effective insect protection technology.