ICAC PLENARY MEETING
2nd - 5th December 2023
Mumbai, India

World Cotton Trade and Specialty Cotton

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Commodity Trade Analyst
ICAC

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World cotton lint trade trend

MILLION MT


7.2 7.8 9.7 8.1 8.4 6.6 7.8 7.6 10.1 10.0 9.0 7.8 7.6 8.3 9.1 9.3 9.2 10.8 9.7 8.1 9.2
Slowing world cotton lint trade

YEAR TO YEAR GROWTH RATE

Q1: 11, 6  
Q2: 54  
Q3: 22, 12  
Q4: 3, -10

2020 2021 2022 2023
World cotton lint leading exporters

2022/23 Est.

USA - 34%
Brazil - 18%
F. Africa - 16%
Australia - 15%
EU-25 - 4%
India - 3%
EU-25 - 3%
Others - 14%

2023/24 Proj.

USA - 29%
Brazil - 22%
F. Africa - 18%
Australia - 15%
EU-25 - 4%
India - 2%
Others - 14%
Francophone Africa leading exporters

- Mali
- Benin
- Burkina Faso
- Côte d’Ivoire
- Cameroon
- Chad
- Togo

2021/22  | 2022/23 est.  | 2023/24 Proj.
--- | --- | ---
Mali | 345 | 320 |
Benin | 290 | 250 |
Burkina Faso | 200 | 180 |
Côte d’Ivoire | 306 | 250 |
Cameroon | 132 | 125 |
Chad | 60 | 45 |
Togo | 22 | 15 |

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World cotton lint leading importers

2022/23 Est.
- CHINA: 17%
- VIETNAM: 17%
- BANGLADESH: 17%
- TURKEY: 12%
- PAKISTAN: 12%
- INDONESIA: 4%
- INDIA: 4%
- OTHERS: 17%

2023/24 Proj.
- CHINA: 23%
- VIETNAM: 18%
- BANGLADESH: 17%
- TURKEY: 11%
- PAKISTAN: 7%
- INDONESIA: 5%
- INDIA: 4%
- OTHERS: 15%
## Specialty cotton production

### SPECIALITY COTTON PRODUCTION

<table>
<thead>
<tr>
<th>000 TONNES</th>
<th>2019/20</th>
<th>2020/21</th>
<th>2021/22 EST.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total world cotton production</td>
<td>26258</td>
<td>23989</td>
<td>25176</td>
</tr>
<tr>
<td>Total ELS and LS cotton production</td>
<td>387</td>
<td>308</td>
<td></td>
</tr>
<tr>
<td>Total cotton production under Identity programs</td>
<td>7170</td>
<td>6321</td>
<td>6832</td>
</tr>
</tbody>
</table>

### As a percentage of total world production of cotton

<table>
<thead>
<tr>
<th></th>
<th>2019/20</th>
<th>2020/21</th>
<th>2021/22 EST.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total ELS and LS cotton production</td>
<td>1.6</td>
<td>1.2</td>
<td></td>
</tr>
<tr>
<td>Total cotton production under Identity programs</td>
<td>27.3</td>
<td>26.3</td>
<td>27.1</td>
</tr>
</tbody>
</table>
LS and ELS cotton production

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>119</td>
<td>103</td>
<td>105</td>
</tr>
<tr>
<td>Egypt</td>
<td>72</td>
<td>73</td>
<td>76</td>
</tr>
<tr>
<td>India</td>
<td>85</td>
<td>70</td>
<td>85</td>
</tr>
<tr>
<td>China</td>
<td>65</td>
<td>40</td>
<td>75</td>
</tr>
<tr>
<td>Israel</td>
<td>6</td>
<td>5</td>
<td>17</td>
</tr>
<tr>
<td>Turkmenistan</td>
<td>17</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Turkey</td>
<td>17</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Peru</td>
<td>6</td>
<td>9</td>
<td>11</td>
</tr>
</tbody>
</table>
LS and ELS cotton trade by country in 2021/22 season

**EXPORTS**
- Egypt: 35%
- United States: 56%
- Israel: 7%
- Others: 2%

**IMPORTS**
- Pakistan: 43%
- China: 16%
- India: 30%
- Others: 11%
Total cotton production under identity programs

<table>
<thead>
<tr>
<th>Year</th>
<th>Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018/19</td>
<td>6.26</td>
</tr>
<tr>
<td>2019/20</td>
<td>7.15</td>
</tr>
<tr>
<td>2020/21</td>
<td>6.32</td>
</tr>
<tr>
<td>2021/22</td>
<td>6.82</td>
</tr>
</tbody>
</table>
As a percentage of total identity programs cotton production in 2021/22

- BCI and equivalents: 81%
- BASF e3: 3%
- Organic cotton by Textile Exchange: 5%
- US Cotton Trust Protocol: 6%
- REEL Cotton: 2%
- ISCC: 2%
- China Sustainable Development Programme: 1%
As a percentage of total cotton production under BCI and equivalents 2021/22

- **BCI without equivalents** 41%
- **ABR Program** 39%
- **Cotton Made in Africa** 13%
- **myBMP** 7%
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Thank You

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