

**79TH PLENARY MEETING OF THE
INTERNATIONAL COTTON
ADVISORY COMMITTEE**

**COUNTRY STATEMENT
THE UNITED STATES OF AMERICA**

**Washington DC
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2021/22 UPLAND COTTON SITUATION AND OUTLOOK

(Based on the November 2021 WASDE-USDA Estimate)

Area and Production

U.S. upland cotton production for the 2021 crop (August 2021 - July 2022 marketing year) is forecast at 17.85 million 480-pound bales (4.6 MMT), up 27 percent from 2020/21, and slightly above the 5-year average of 17.79 million bales (3.9 MMT).

Planted area in 2021/22 totaled 4.48 million hectares, down seven percent from the previous year. Harvested area is forecast at 3.97 million hectares; this suggests an abandonment rate of 11 percent, down from over 32 percent in 2020/21. Yield per harvested hectare is forecast at 980 kilograms, above the 5-year average of 962 kg/hectare.

Less abandonment and more favorable weather conditions in Texas prompted harvested area up more than one-fifth from the previous year. Upland production in Texas is expected to surpass the previous year by more than 3.0 million bales to 8.1 million.

Domestic Mill Use

In 2021/22, mill use of upland cotton is projected at nearly 2.5 million bales (541 thousand metric tons), up slightly from the previous year.

Foreign Trade

For 2021/22, upland cotton exports are projected at nearly 15.1 million bales (3.28 MMT), a 3 percent decrease from the previous year. The U.S. share of world exports of all cotton isn't expected to change at 32 percent.

Exports for 2020/21 were 15.6 million bales (3.39 MMT), the highest level in 3 years. The top export destination was China, which accounted for roughly one-third of shipments. The top ten upland markets (in descending order) were China, Vietnam, Pakistan, Turkey, Mexico, Bangladesh, Indonesia, Thailand, Malaysia, and South Korea. The top ten destinations represented more than 92 percent of U.S. upland cotton exports.

Supply and Stocks

The 3.02 million bale (658 thousand metric tons) beginning stocks in 2021/22 are down 56 percent from the previous year. Ending stocks for 2021/22 are forecast at 3.36 million bales (731 thousand metric tons), up 11 percent from 2020/21.

Inter-fiber Competition

Total U.S. domestic cotton consumption decreased in calendar 2020 due to global impacts from COVID-19. U.S. cotton mill use declined to 0.9 billion pounds in 2020, 35 percent below 2019. U.S. cotton textile and apparel product imports and exports were lower as well in 2020. U.S. textile and apparel imports reached nearly 7.9 billion pounds, 12 percent below a year earlier and the lowest since 2001. Meanwhile, cotton textile and apparel exports declined by nearly a third in 2020 to 1.1 billion pounds, the lowest since 1994. As a result, total U.S. domestic consumption of cotton in 2020 reached only 7.7 billion pounds, 12 percent below a year earlier and the lowest since 1993.

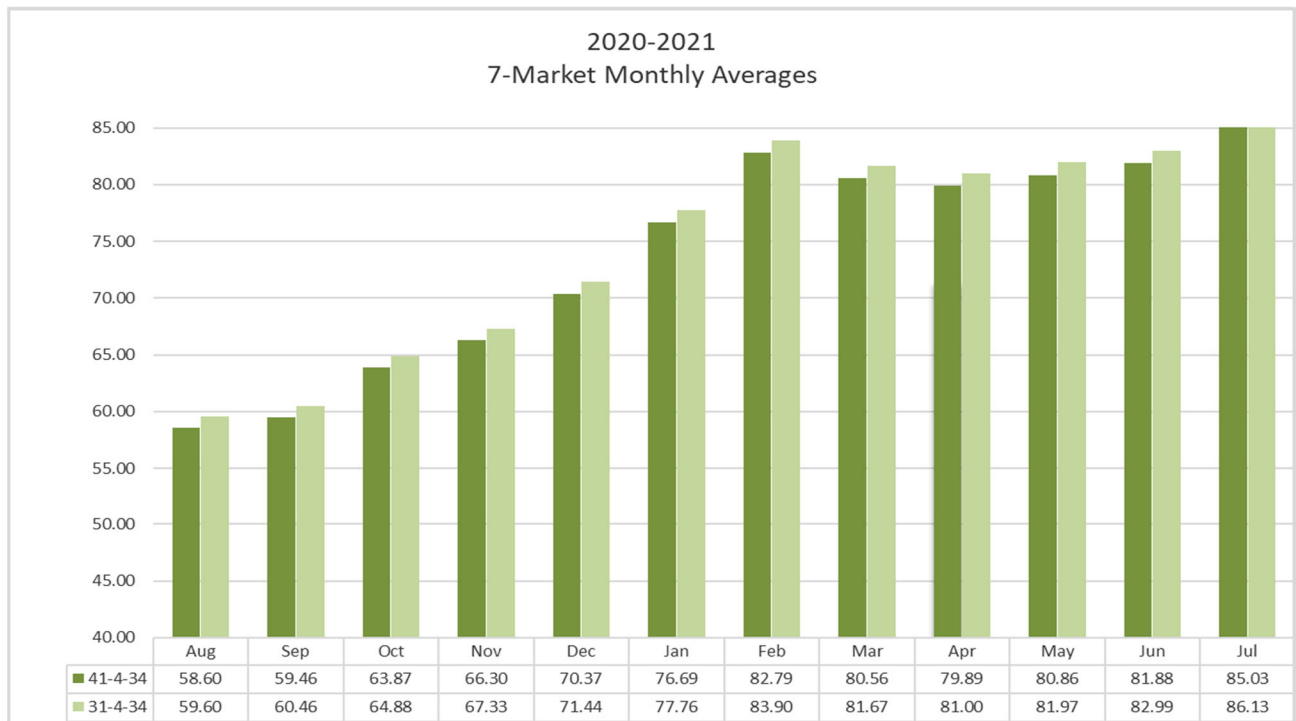
Similarly, synthetic fiber products were also affected by COVID-19 in calendar year 2020. U.S. textile and apparel imports of synthetic fiber products decreased 5.5 percent from 2019 to 9.9 billion pounds in 2020. Synthetic products accounted for nearly 52 percent of the total U.S. textile and apparel product imports in 2020, while cotton contributed 41 percent. Meanwhile, synthetic product exports reached only 1.3 billion pounds in 2020, 14.5 percent below 2019. Synthetic products accounted for 51 percent of the total U.S. textile and apparel product exports in 2020, compared with cotton's 43-percent share.

Overall, cotton accounts for less than one-third of total U.S. fiber consumption, continuing the downward trend of the past decade. Likewise, cotton fiber spun in the U.S. textile industry follows a similar pattern. U.S. per capita consumption of cotton totaled an estimated 23 pounds per person in calendar 2020, the lowest since 1988. However, less than 3 pounds of this total was spun in the United States, roughly half the level just a decade ago.

UPLAND 2020 CROP

2020 Prices:

Spot cotton quotations for color 41, leaf 4, staple 34, mike 35-36 and 43-49, strength readings of 27.0-28.9 grams per tex, uniformity of 81 units in the designated spot markets averaged 73.86 cents per pound for the 2020-2021 season, up from 57.58 cents for the 2019-2020 season. The season’s lowest daily quotation for the base quality occurred on August 12, 2020 at 57.20 cents per pound and the season’s highest quotation was 88.80 cents on February 24, 2021. The lowest monthly average for the marketing year was 58.60 cents per pound in August 2020 and the highest was 85.03 cents per pound in July 2021.



Source: USDA, AMS, Cotton and Tobacco Program

Quotations for color 31, leaf 3, staple 34, mike 35-36 and 43-49, strength readings of 27.0-28.9 grams per tex, uniformity of 81 units in the designated spot markets averaged 74.93 cents per pound for the 2020-2021 season, up from 58.70 cents for the 2019-2020 season.

The average price received by farmers for Upland cotton in July was 73.00 cents per pound in the 2020-2021 marketing year. The 2019-2020 marketing year average price

was 58.38 cents, compared to the 2018-2019 marketing year of 70.30 cents, according to the National Agricultural Statistics Service, USDA. The marketing year average price is monthly prices weighted by monthly marketings during the period August through the following July, with no allowances for unredeemed loans.

Spot cotton transactions for Upland and Pima in the designated markets totaled 1,396,684 running bales in the 2020-2021 marketing year, down from 1,614,995 bales in the 2019-2020 marketing year, but up from 1,283,283 bales in 2018-2019.

Season average prices, upland cotton, for the base quality, by designated markets, cents per pound, 2015-2020 1/ 2/

Market Areas	2015	2016	2017	2018	2019	2020
Southeast	63.31	72.91	78.91	72.55	60.53	76.62
North Delta	62.43	71.81	77.60	71.52	59.40	75.62
South Delta	62.43	71.81	77.60	71.52	59.40	75.62
East Texas-Oklahoma	59.29	70.25	74.43	68.67	57.05	73.24
West Texas	59.15	70.06	73.85	68.59	56.90	73.14
Desert Southwest	59.72	68.50	73.35	68.04	54.66	71.13
San Joaquin Valley	60.87	69.61	74.13	68.54	55.16	71.63
Average	61.03	70.71	75.70	69.92	57.58	73.86

1/ Year beginning August 1. 2/ In mixed lots, net weight, compressed, FOB car/truck.

Qualities 2020 Crop:

2020 Crop Quality Highlights

The USDA, AMS, Cotton and Tobacco Program's Market News Division released the Annual Quality Report for the 2020 cotton crop on June 28, 2021. USDA, AMS, Cotton and Tobacco Program Classing Offices graded 13,646,902 Upland bales and 531,974 bales of American Pima. For the 2020 crop, 74.8 percent of cotton classed was tenderable for delivery against the Intercontinental Exchange (ICE) Cotton Futures contract.

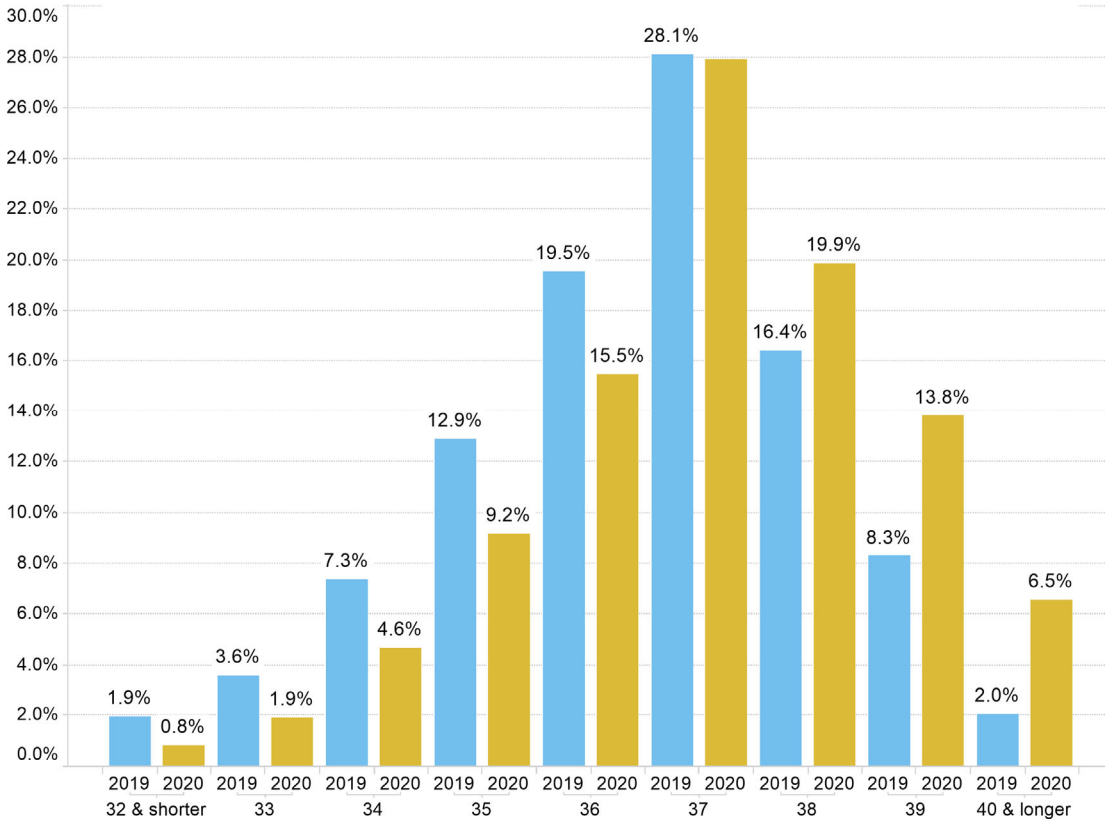
2020 Upland Cotton Quality Highlights:

- Percentage tenderable for delivery against the Intercontinental Exchange (ICE) Cotton Futures contract: 74.8 percent
- Predominate Color Grade: 41, represents 38.0 percent of the crop
- Predominate Leaf Grade: 3, represents 38.1 percent of the crop
- Average Staple: 37.09 thirty-seconds of an inch
- Average Length: 1.16 inches
- Average Micronaire: 4.27
- Average Strength: 30.60 grams per tex
- Average Uniformity: 81.19
- Average Trash reading: 0.39 2020 Pima

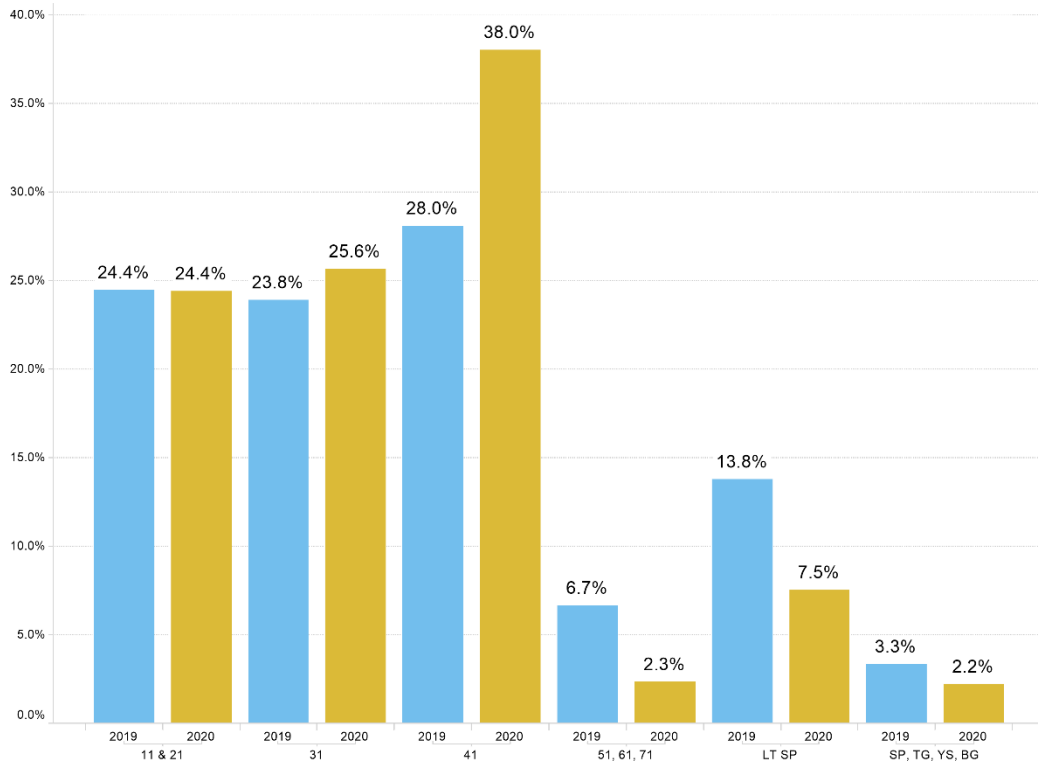
Cotton Quality Highlights:

- Predominate Color Grade: 2, represents 69.4 percent of the crop
- Predominate Leaf Grade: 2, represents 54.3 percent of the crop
- Average Staple: 49.31
- Average Length: 1.43 inches
- Average Micronaire: 4.28
- Average Strength: 44.00 grams per tex
- Average Uniformity: 86.70
- Average Trash reading: 0.27

Staple - Upland



Color Grade – Upland



Varieties Planted 2020 Crop:

The Deltapine brand of Upland cottonseed was the most popular planted in the United States for the 2020-2021 season, according to the USDA, Agricultural Marketing Service's Cotton and Tobacco Program. The Americot brand was the second most popular followed by Phytogen, BASF-Stoneville, BASF-FiberMax, ALL-TEX/DYNA-GRO, CROPLAN, Miscellaneous, and Seed Source Genetics.

Deltapine brand varieties were the most popular planted in 2020, accounting for 36.9 percent of the United States acreage. This brand accounted for 49.6 percent of the acreage planted in the southeastern states (Alabama, Florida, Georgia, North Carolina, South Carolina, and Virginia). It accounted for about 65.4 percent in the south central states (Arkansas, Louisiana, Mississippi, Missouri, and Tennessee),

25.3 percent in the southwestern states (Texas, Oklahoma, and Kansas), and 31.8 percent in the western states (Arizona, California, and New Mexico). Deltapine's most popular varieties were DP 1646 B2XF, DP 1845 B3XF, DP 1820 B3XF, and DP 1840 B3XF, accounting respectively for 21.3, 2.0, 1.6, and 1.6 percent of the U.S. Upland cotton acreage.

Americot brand varieties were the second most popular planted in 2020, accounting for 28.1 percent of the United States acreage. These varieties accounted for 32.7 percent of the acreage planted in the southeastern states, 13.7 percent in the south central states, 30.6 percent in the southwestern states, and 21.0 percent in the western states. The most popular Americot varieties were NG 5711 B3XF, NG 4936 B3XF, NG 4545 B2XF, and NG 3406 B2XF, accounting respectively for about 6.6, 4.8, 3.1, and 2.1 percent of the United States acreage planted to Upland cotton.

Phytogen brand varieties were the third most popular planted in 2020, accounting for 19.5 percent of the United States acreage. They accounted for 9.8 percent of the acreage planted in the southeastern states, 11.9 percent of the acreage in the south central states, 24.8 percent in the southwestern states and 17.0 percent in the western states. The most popular Phytogen brand varieties were PHY 400 W3FE, PHY 350 W3FE, PHY 480 W3FE, and PHY 444 WRF, accounting respectively for 5.1, 4.3, 1.6, and 1.5 percent of the United States acreage planted to Upland cotton.

BASF-Stoneville brand varieties were the fourth most popular planted in 2020. These varieties accounted for about 5.6 percent of the acreage planted. They accounted for 6.2 percent of the acreage planted in the southeastern states, 3.9 percent of the acreage in the south central states, 5.6 percent in the southwestern states and 11.8 percent in the western states. The most popular BASF-Stoneville varieties were ST 5600 B2XF, ST 5707 B2XF, ST 4990 B3XF, and ST 4550 GLTP, accounting respectively for 1.7, 1.5,

0.6, and 0.4 percent of the United States acreage planted to Upland cotton.

BASF-FiberMax brand varieties were the fifth most popular and accounted for about 4.9 percent of the U.S. acreage planted in 2020. ALL- TEX/DYNA-GRO varieties were the sixth most popular and accounted for about 3.5 percent of the 2020 cotton acreage. CROPLAN varieties were the seventh most popular and accounted for about 1.3 percent of the 2020 cotton acreage.

Phytogen was the most popular brand of American Pima varieties planted in 2020. Phytogen variety PHY 881 R accounted for 81.6 percent of the United States Pima acreage. Phytogen's PHY 841 R was the second most planted American Pima variety and accounted for 5.4 percent of the U.S. crop. Deltapine's DP 348 RF was the next most popular variety and accounted for 5.0 percent of the U.S. Pima acreage.

Estimates of the percentage of the various varieties of cotton planted in the United States for 2020 were based on informal surveys made by the Cotton and Tobacco Program Classing Offices. Those surveyed included ginner, seed dealers, extension agents, and other knowledgeable sources.

Estimated percentage of Upland cotton planted to leading specified varieties, by growth area, 2020 Crop

Variety	US	Southeast	South Central	Southwest	Far West
DP 1646 B2XF Deltapine	21.35%	33.83%	46.88%	10.73%	13.14%
NG 5711 B3XF Americot	6.62%	19.24%	1.82%	3.84%	2.60%
PHY 400 W3FE Phytogen	5.07%	1.83%	7.45%	5.56%	3.59%
NG 4936 B3XF Americot	4.80%	6.71%	9.82%	2.91%	2.59%
PHY 350 W3FE Phytogen	4.26%	3.01%	1.00%	5.67%	-
NG 4545 B2XF Americot	3.15%	-	-	5.07%	1.62%
NG 3406 B2XF Americot	2.08%	0.04%	0.01%	3.36%	0.14%
DP 1845 B3XF Deltapine	1.96%	-	0.31%	3.10%	-
NG 3930 B3XF Americot	1.82%	0.32%	0.02%	2.80%	1.48%
NG 3500 XF Americot	1.76%	-	-	2.87%	-
ST 5600 B2XF BASF-Stoneville	1.72%	0.52%	0.48%	2.48%	0.67%
DP 1820 B3XF Deltapine	1.64%	-	-	2.66%	0.49%
PHY 480 W3FE Phytogen	1.60%	0.55%	-	2.43%	-
DP 1840 B3XF Deltapine	1.58%	6.11%	-	0.55%	-
DP 1948 B3XF Deltapine	1.58%	-	-	2.57%	-
PHY 444 WRF Phytogen	1.51%	0.21%	0.07%	2.36%	-
DP 1549 B2XF Deltapine	1.50%	-	-	2.03%	13.51%
ST 5707 B2XF BASF-Stoneville	1.47%	-	-	2.38%	-
DP 1725 B2XF Deltapine	1.45%	1.35%	7.09%	0.02%	0.49%
DP 1518 B2XF Deltapine	1.35%	0.02%	8.29%	-	-

ELS COTTON SITUATION AND OUTLOOK

(Based on the November 2021 WASDE-USDA Estimate)

Acreage and Production

The U.S. ELS cotton production in 2021/22 is forecast at 346,000 bales (75,000 MT), down 37 percent from the 2020/21 crop, and significantly below the five-year average of 616,000 bales. U.S. plantings of ELS cotton are estimated at 50,000 hectares in 2021/22, down 38 percent from last year and the lowest since 1986. The national ELS cotton yield is forecast at 1,523 kilograms per harvested hectare, most unchanged from the previous crop. Harvested area is forecast at 49,000 hectares, indicating an abandonment rate of around 2 percent. California remains the dominant ELS producing state.

Domestic Mill Use

Mill use of ELS cotton in 2021/22 is estimated at 15,000 bales (3,000 MT), unchanged from the previous year.

Foreign Trade

U.S. Pima exports for 2020/21 reached 785,000 bales (171,000 MT), up more than 50 percent compared with the previous season. India remained the largest U.S. Pima market. The other top export destinations (descending order) include China, Vietnam, Pakistan, Peru, Bangladesh, Turkey, Egypt, Thailand, and Austria. The top 10 markets accounted for over 90 percent of total ELS exports. Projected ELS exports for 2021/22 are 425,000 bales (93,000 MT).

Projected ELS imports for 2019/20 are less than 1,000 bales. 1,000 bales of ELS were recorded in 2018/19.

Supply and Stocks

The ELS cotton supply for 2021/22 is forecast at 481,000 bales (105,000 MT), 48 percent below the previous year. Ending stocks for 2021/22 are estimated at 41,000 bales (9,000 MT) and down 69 percent from the previous year.

Quality 2020 Crop:

Percentage distribution of color, leaf and staple American Pima cotton classed, by states and United States, 2020 Crop

Quality Designation	Leaf	Arizona		California		New Mexico		Texas		United States	
01	1	11,676	90.9	57,522	12.4	8,981	53.3	15,342	38.8	93,521	17.6
	2	535	4.2	33,817	7.3	3,974	23.6	5,111	12.9	43,437	8.2
	3	3	*	264	0.1	56	0.3	98	0.2	421	0.1
	4	-	-	-	-	1	*	2	*	3	*
	5	-	-	-	-	-	-	-	-	-	-
	6	-	-	-	-	-	-	-	-	-	-
	7	-	-	-	-	-	-	-	-	-	-
TOTAL	-----	12,214	95.1	91,603	19.8	13,012	77.2	20,553	52.0	137,382	25.8
02	1	548	4.3	120,740	26.1	1,664	9.9	8,525	21.6	131,477	24.7
	2	41	0.3	216,989	46.9	2,071	12.3	8,694	22.0	217,795	42.8
	3	12	0.1	9,238	2.0	76	0.5	521	1.3	9,847	1.9
	4	3	*	67	*	-	-	25	0.1	95	*
	5	-	-	-	-	-	-	-	-	-	-
	6	-	-	-	-	-	-	-	-	-	-
	7	-	-	-	-	-	-	-	-	-	-
TOTAL	-----	604	4.7	347,034	75.0	3,811	22.6	17,765	44.9	369,214	69.4
03	1	1	*	4,278	0.9	19	0.1	126	0.3	4,424	0.8
	2	-	-	16,042	3.5	18	0.1	742	1.9	16,802	3.2
	3	12	0.1	2,744	0.6	-	-	175	0.4	2,931	0.6
	4	15	0.1	205	*	-	-	18	*	238	*
	5	1	*	5	*	-	-	-	-	6	*
	6	-	-	-	-	-	-	1	*	1	*
	7	-	-	-	-	-	-	-	-	-	-
TOTAL	-----	29	0.2	23,274	5.0	37	0.2	1,062	2.7	24,402	4.6
04	1	-	-	228	*	-	-	4	*	232	*
	2	-	-	265	0.1	1	*	49	0.1	315	0.1
	3	1	*	162	*	1	*	20	0.1	184	*
	4	1	*	43	*	-	-	16	*	60	*
	5	-	-	3	*	-	-	15	*	18	*
	6	-	-	-	-	-	-	25	0.1	25	*
	7	-	-	-	-	-	-	9	*	9	*
TOTAL	-----	2	*	701	0.2	2	*	138	0.3	843	0.2
05	1	-	-	5	*	-	-	1	*	6	*
	2	-	-	19	*	-	-	2	*	21	*
	3	-	-	14	*	-	-	1	*	15	*
	4	-	-	5	*	-	-	10	*	15	*
	5	-	-	-	-	-	-	7	*	7	*
	6	-	-	-	-	-	-	7	*	7	*
	7	-	-	-	-	-	-	4	*	4	*
TOTAL	-----	-	-	43	*	-	-	32	0.1	75	*
06	1	-	-	3	*	-	-	-	-	3	*
	2	-	-	15	*	-	-	-	-	15	*
	3	-	-	6	*	-	-	-	-	6	*
	4	-	-	-	-	-	-	-	-	-	-
	5	-	-	1	*	-	-	-	-	1	*
	6	-	-	-	-	-	-	-	-	-	-
	7	-	-	-	-	-	-	-	-	-	-
TOTAL	-----	-	-	25	*	-	-	-	-	25	*
07	1	-	-	-	-	-	-	-	-	-	-
	2	-	-	18	*	-	-	-	-	18	*
	3	-	-	15	*	-	-	-	-	15	*
	4	-	-	-	-	-	-	-	-	-	-
	5	-	-	-	-	-	-	-	-	-	-
	6	-	-	-	-	-	-	-	-	-	-
	7	-	-	-	-	-	-	-	-	-	-
TOTAL	-----	-	-	33	*	-	-	-	-	33	*
Staple											
44 & Shorter		6	*	3,964	0.9	424	2.5	1,431	3.6	5,825	1.1
46		253	2.0	40,690	8.8	2,649	15.7	6,484	16.4	50,076	9.4
48		7,165	55.8	77,245	16.7	10,102	59.9	20,741	52.4	115,253	21.7
50		5,353	41.7	293,751	63.5	3,496	20.7	8,983	22.7	311,583	58.6
52 & Longer		72	0.6	47,063	10.2	191	1.1	1,911	4.8	49,237	9.3
Average Staple		48.81		49.47		48.04		48.17		48.81	
Average Length		1.42		1.44		1.40		1.40		1.43	
Extraneous Matter											
Bark		2	*	27	*	2	*	98	0.2	129	*
Grass		1	*	1,038	0.2	415	2.5	112	0.3	1,566	0.3
Spindle Twist		-	-	166	*	-	-	255	0.6	421	0.1
Prep		-	-	11	*	-	-	40	0.1	51	*
All Other		-	-	76	*	15	0.1	42	0.1	133	*

Percentage distribution of mike, strength and uniformity for American Pima cotton classed, by states and United States, 2020 Crop

	Arizona		California		New Mexico		Texas		United States	
MIKE Range										
2.4 & Below	-	-	-	-	-	-	2	*	2	*
2.5 - 2.6	-	-	4	*	3	*	7	*	14	*
2.7 - 2.9	3	*	76	*	5	*	303	0.8	387	0.1
3.0 - 3.2	3	*	423	0.1	298	1.8	1,537	3.9	2,261	0.4
3.3 - 3.4	14	0.1	1,840	0.4	642	3.8	2,016	5.1	4,512	0.8
3.5 - 3.6	23	0.2	7,690	1.7	1,777	10.5	2,718	6.9	12,208	2.3
3.7 - 4.2	10,833	84.3	133,040	28.8	11,419	67.7	22,681	57.3	177,973	33.5
4.3 - 4.9	1,972	15.3	319,273	69.0	2,718	16.1	10,284	26.0	334,247	62.8
5.0 - 5.2	1	*	301	0.1	-	-	2	*	304	0.1
5.3 & Above	-	-	50	*	-	-	-	-	50	*
Average	4.09		4.32		3.96		4.00		4.28	
MIKE										
2.4 & Below	-	-	-	-	-	-	2	*	2	*
2.5	-	-	-	-	2	*	-	-	2	*
2.6	-	-	4	*	1	*	7	*	12	*
2.7	1	*	3	*	-	-	44	0.1	48	*
2.8	2	*	38	*	3	*	83	0.2	126	*
2.9	-	-	35	*	2	*	176	0.4	213	*
3.0	2	*	76	*	46	0.3	255	0.6	379	0.1
3.1	-	-	102	*	83	0.5	506	1.3	691	0.1
3.2	1	*	245	0.1	169	1.0	776	2.0	1,191	0.2
3.3	-	-	613	0.1	216	1.3	957	2.4	1,786	0.3
3.4	14	0.1	1,227	0.3	426	2.5	1,059	2.7	2,726	0.5
3.5	12	0.1	2,999	0.6	846	5.0	1,272	3.2	5,129	1.0
3.6	11	0.1	4,691	1.0	931	5.5	1,446	3.7	7,079	1.3
3.7	132	1.0	8,450	1.8	1,199	7.1	1,810	4.6	11,591	2.2
3.8	373	2.9	11,207	2.4	1,553	9.2	2,055	5.2	15,188	2.9
3.9	1,481	11.5	18,486	4.0	2,236	13.3	3,701	9.4	25,904	4.9
4.0	3,032	23.6	22,877	4.9	1,668	9.9	4,778	12.1	32,355	6.1
4.1	3,581	27.9	27,787	6.0	2,202	13.1	5,671	14.3	39,241	7.4
4.2	2,234	17.4	44,233	9.6	2,561	15.2	4,666	11.8	53,694	10.1
4.3	1,334	10.4	71,176	15.4	1,573	9.3	4,263	10.8	78,346	14.7
4.4	492	3.8	86,483	18.7	626	3.7	3,914	9.9	91,515	17.2
4.5	116	0.9	75,007	16.2	454	2.7	1,563	4.0	77,140	14.5
4.6	28	0.2	51,875	11.2	63	0.4	529	1.3	52,495	9.9
4.7	1	*	25,538	5.5	2	*	12	*	25,553	4.8
4.8	1	*	7,734	1.7	-	-	2	*	7,737	1.5
4.9	-	-	1,460	0.3	-	-	1	*	1,461	0.3
5.0	-	-	207	*	-	-	2	*	209	*
5.1	1	*	63	*	-	-	-	-	64	*
5.2	-	-	31	*	-	-	-	-	31	*
5.3 & Above	-	-	66	*	-	-	-	-	66	*
Average	4.09		4.32		3.96		4.00		4.28	
Strength										
36 & Below	4	*	834	0.2	1,402	8.3	1,121	2.8	3,361	0.6
37	4	*	6,047	1.3	921	5.5	1,181	3.0	8,153	1.5
38	16	0.1	16,630	3.6	821	4.9	1,544	3.9	19,011	3.6
39	12	0.1	20,020	4.3	550	3.3	1,380	4.0	22,162	4.2
40	66	0.5	10,659	2.3	1,121	6.6	2,402	6.1	14,248	2.7
41	255	2.0	13,554	2.9	2,016	12.0	4,002	10.1	19,827	3.7
42	812	6.3	33,267	7.2	3,046	18.1	5,424	13.7	42,549	8.0
43	2,933	22.8	70,636	15.3	2,912	17.3	6,226	15.7	82,707	15.5
44	5,038	39.2	99,260	21.5	2,233	13.2	7,005	17.7	113,536	21.3
45	2,581	20.1	99,054	21.4	1,036	6.1	5,179	13.1	107,850	20.3
46	906	7.1	59,008	12.8	563	3.3	2,497	6.3	62,974	11.8
47	161	1.3	23,646	5.1	174	1.0	951	2.4	24,932	4.7
48 & Above	61	0.5	10,098	2.2	67	0.4	438	1.1	10,664	2.0
Average	44.40		44.15		41.92		42.97		44.00	
Uniformity										
83 & Below	9	0.1	1,083	0.2	88	0.5	648	1.6	1,828	0.3
84	38	0.3	22,825	4.9	1,311	7.8	1,970	5.0	26,144	4.9
85	831	6.5	54,963	11.9	3,593	21.3	6,024	15.2	65,411	12.3
86	7,235	56.3	169,339	36.6	9,071	53.8	19,893	50.3	205,538	38.6
87	4,687	36.5	191,740	41.4	2,771	16.4	10,684	27.0	209,882	39.5
88 & Above	49	0.4	22,763	4.9	28	0.2	331	0.8	23,171	4.4
Average	86.76		86.73		86.25		86.43		86.70	
SAMPLES CLASSED	12,849		462,713		16,862		39,550		531,974	

Varieties Planted 2020:

Estimated percentage of American Pima cotton acreage planted to specified Pima varieties, by states, crop of 2020

		AZ	CA	NM \1	TX \1	US
Phytogen	PHY 881 R	57.75%	93.34%			81.60%
Phytogen	PHY 841 R	12.81%	5.10%			5.40%
Deltapine	DP 348 RF	-	0.67%			4.99%
Deltapine	DP 341 RF	10.01%	0.19%			2.90%
Deltapine	DP 358 RF	-	-			2.21%
Gowan Cotton Company	HA 1432	-	0.44%			1.62%
Phytogen	PHY 888 R	14.68%	0.21%			0.71%
Miscellaneous	MISC	4.76%	0.05%			0.57%

/1 Individual state data withheld

ORGANIC COTTON MARKET SUMMARY

Production

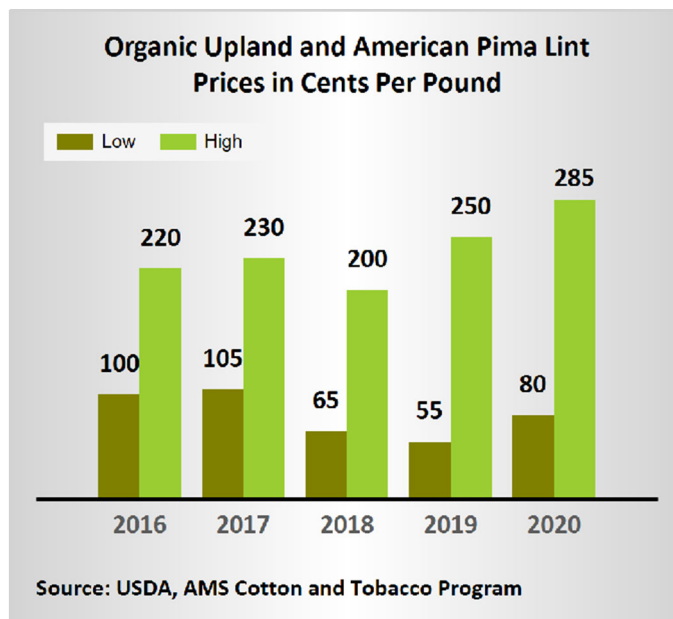
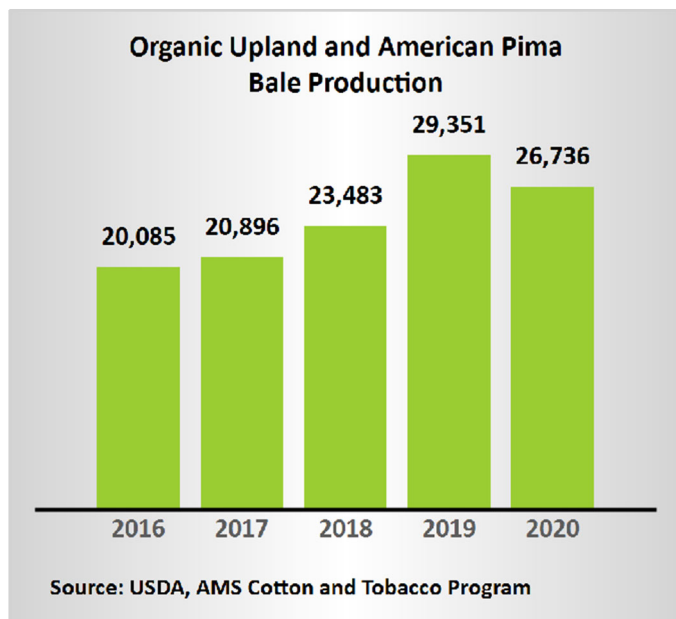
The 2020 organic Upland and American Pima cotton production in the United States totaled 26,736 bales according to information collected from organic producers, marketing associations, and gins that process organic cotton. Production decreased by 2,615 bales from the previous year. An additional 263 transitional bales were reported. Production was concentrated in West Texas with additional acreage in Arizona, California, and New Mexico.

Cottonseed

Organic cottonseed prices ranged from 400 to 600 dollars per ton. This compares to 180 to 335 dollars per ton for conventional cotton. Cottonseed yields ranged from 500 to 775 pounds of seed per bale of ginned lint. Most of the cottonseed was sold to organic dairies. Some was saved for replanting and organic fertilizer. Other uses include products for human consumption.

2021 Crop Outlook

Limited availability of non-genetically modified planting seed for organic Upland and American Pima forced producers to incorporate varieties from other locations. Irrigated acreage increased in Arizona and California. West Texas received untimely rainfall during the growing season that left fields soggy and weeds became uncontrollable. Some stands were failed and plowed. Demand was very good. Transitional acres were expected to increase. Texas continued to lead organic cotton plantings and production, with additional acreage in Arizona, California, and New Mexico. The COVID-19 pandemic pressured commodity markets and shipping logistics.



COTTON MARKET DEVELOPMENT:

Domestic Market Development

Under provisions of the Cotton Research and Promotion Act of 1966, a Cotton Research and Promotion Program was started in the United States in 1967. The primary objective is to carry out an effective and continuous program of research and promotion in order to strengthen the competitive position of cotton by expanding domestic and foreign markets for cotton, improving fiber quality, and lowering costs of production.

From 1967 to 1990, the program was financed through refundable assessments paid by producers. Amendments to the Act, contained in the 1990 Farm Bill, expanded the funding base for the program by authorizing assessments on imported cotton and cotton-containing products while eliminating refunds of producer paid assessments. These changes became effective in 1992. Assessments are levied on each bale or bale equivalent of cotton at a rate of \$1 per bale with a supplemental assessment not to exceed one percent of the value of lint of each bale.

The Act provides for the establishment of a Cotton Board to assist the Secretary of Agriculture by administering the Cotton Research and Promotion Program. The Board collects funds from cotton producers and importers to promote and research the use of cotton and its products. The Board reviews all proposed projects and budgets and recommends programs for approval by the Secretary of Agriculture. The Cotton Board consists of 38 cotton producer and importer representatives appointed by the Secretary of Agriculture from nominations submitted by certified cotton producer and importer organizations. Cotton Board members represent each major cotton-producing state in the United States and cotton importers.

Research, promotion and technical assistance activities are carried out by a contracting organization, Cotton Incorporated. Research activities funded under the

Cotton Research and Promotion Program effectively develop innovative processes and treatments for cotton to provide consumers with the latest in fiber technology.

International Market Development

Cotton Incorporated:

Cotton Incorporated's overseas operations began in 1973, with the purpose of expanding markets for cotton by providing technical and marketing assistance abroad. Cotton Incorporated maintains headquarters in United States with offices in China, Japan, Hong Kong, and Mexico. Experts from Cotton Incorporated work closely with mills and their customers to develop and deliver the best cotton products possible. They also help importers establish productive supply chains and sourcing relationships worldwide. Overseas activities include technical servicing to mills to enhance cotton processing technologies, introduction of new fabric and technological advances, and the presentation of color and fabric trend forecasting.

Cotton Council International:

Cotton Council International (CCI) is the export promotion arm of the National Cotton Council of America. CCI's mission is to increase exports of U.S. cotton, cottonseed and U.S. manufactured cotton products through activities that affect every phase of the marketing chain -- from the initial mill buyer of cotton fiber or purchaser of U.S. cotton-rich yarns and fabrics on through to the final consumer. These activities are partly funded by the Foreign Agricultural Service of the U.S. Department of Agriculture.

From its offices in the United States, the United Kingdom, Korea, China, Hong Kong, and South Korea along with in-country representatives throughout Asia, Latin America and Europe, CCI executes a strategic mix of programs designed to stimulate trade and consumer demand for U.S. cotton. "CCI's mission is to make U.S. cotton the preferred fiber for mills/manufacturers, brands/retailers and consumers, commanding a value-added premium that delivers profitability across the U.S. cotton industry and drives export growth of fiber, yarn and other cotton products. CCI's programs reach about 3 billion current and potential customers of U.S. cotton in more than 50 countries worldwide. Examples of CCI activities include: orientation tours to the United States for foreign cotton spinners and manufacturers' representatives; trade missions to cotton-consuming countries for producers, exporters and government representatives; marketing support via advertising campaigns and retail sales promotions; and buying delegations for COTTON USA partners to targeted sourcing countries.

COTTON: SUPPLY AND DISAPPEARANCE, ALL KINDS, 1991-2021

Marketing Year Beginning	Beginning Stocks 1/	Production2/	Imports	Total Supply3/	Mill Use 4/	Exports	Total Demand	Loss 5/	Ending Stocks
1,000 480-POUND NET WEIGHT BALES ALL KINDS									
1991	2,344	17,614	13	19,971	9,613	6,646	16,259	8	3,704
1992	3,704	16,218	1	19,923	10,250	5,201	15,451	-190	4,662
1993	4,662	16,134	6	20,802	10,418	6,862	17,280	-8	3,530
1994	3,530	19,662	20	23,212	11,198	9,402	20,600	-38	2,650
1995	2,650	17,900	408	20,958	10,647	7,675	18,322	27	2,609
1996	2,609	18,942	403	21,954	11,126	6,865	17,991	-8	3,971
1997	3,971	18,793	13	22,777	11,349	7,500	18,849	41	3,887
1998	3,887	13,918	439	18,244	10,401	4,298	14,699	-394	3,939
1999	3,939	16,968	97	21,004	10,194	6,750	16,944	145	3,915
2000	3,915	17,188	16	21,119	8,862	6,740	15,602	-483	6,000
2001	6,000	20,303	21	26,324	7,696	11,000	18,696	180	7,448
2002	7,448	17,209	67	24,724	7,273	11,900	19,173	166	5,385
2003	5,385	18,255	45	23,685	6,266	13,758	20,024	211	3,450
2004	3,450	23,251	29	26,730	6,691	14,436	21,127	108	5,495
2005	5,495	23,890	28	29,413	5,871	17,673	23,544	-200	6,069
2006	6,069	21,588	19	27,676	4,935	12,959	17,894	303	9,479
2007	9,479	19,207	12	28,698	4,584	13,634	18,218	429	10,051
2008	10,051	12,825	0	22,876	3,541	13,261	16,802	-263	6,337
2009	6,337	12,183	0	18,520	3,550	12,037	15,587	-14	2,947
2010	2,947	18,102	9	21,058	3,900	14,376	18,276	182	2,600
2011	2,600	15,573	19	18,192	3,300	11,714	15,014	-172	3,350
2012	3,350	17,314	10	20,674	3,500	13,026	16,526	348	3,800
2013	3,800	12,909	13	16,722	3,550	10,530	14,080	292	2,350
2014	2,350	16,319	12	18,681	3,575	11,246	14,821	210	3,650
2015	3,650	12,888	33	16,571	3,450	9,153	12,603	168	3,800
2016	3,800	17,170	7	20,977	3,250	14,917	18,167	60	2,750
2017	2,750	20,923	3	23,676	3,225	16,281	19,506	-30	4,200
2018	4,200	18,367	3	22,570	2,975	14,833	17,809	-88	4,850
2019	4,850	19,913	3	24,766	2,150	15,512	17,663	-146	7,250
2020 6/	7,250	14,608	1	21,859	2,400	16,371	18,771	-62	3,150
2021 7/	3,150	18,198	5	21,353	2,500	15,500	18,000	-47	3,400

COTTON: SUPPLY AND DISAPPEARANCE, UPLAND, 1991-2021

Marketing Year Beginning	Beginning Stocks 1/	Production2/	Imports	Total Supply 3/	Mill Use 4/	Exports	Total Demand	Loss 5/	Ending Stocks
1,000 480-POUND NET WEIGHT BALES UPLAND									
1991	2,262	17,216	13	19,491	9,548	6,348	15,896	12	3,583
1992	3,583	15,710	1	19,294	10,190	4,869	15,059	-221	4,456
1993	4,456	15,764	6	20,226	10,346	6,555	16,901	22	3,303
1994	3,303	19,324	18	22,645	11,109	8,978	20,087	-30	2,588
1995	2,588	17,532	400	20,520	10,538	7,375	17,913	64	2,543
1996	2,543	18,413	403	21,359	11,020	6,399	17,419	20	3,920
1997	3,920	18,245	13	22,178	11,234	7,060	18,294	62	3,822
1998	3,822	13,476	427	17,725	10,254	4,010	14,264	-375	3,836
1999	3,836	16,294	53	20,183	10,055	6,303	16,358	160	3,665
2000	3,665	16,799	8	20,472	8,738	6,303	15,041	-448	5,879
2001	5,879	19,603	6	25,488	7,592	10,603	18,195	173	7,120
2002	7,120	16,531	10	23,660	7,170	11,266	18,436	85	5,140
2003	5,140	17,823	4	22,967	6,204	13,239	19,443	140	3,384
2004	3,384	22,505	8	25,897	6,629	13,683	20,312	103	5,482
2005	5,482	23,260	9	28,751	5,820	17,115	22,935	-175	5,991
2006	5,991	20,823	10	26,824	4,896	12,324	17,220	313	9,291
2007	9,291	18,355	6	27,652	4,548	12,801	17,349	408	9,895
2008	9,895	12,395	0	22,289	3,512	13,029	16,541	-284	6,032
2009	6,032	11,783	0	17,815	3,529	11,343	14,872	14	2,929
2010	2,929	17,598	2	20,529	3,874	13,881	17,755	202	2,572
2011	2,572	14,722	13	17,307	3,278	11,120	14,398	-172	3,081
2012	3,081	16,534	6	19,621	3,478	12,182	15,660	348	3,613
2013	3,613	12,275	6	15,894	3,527	9,850	13,377	292	2,225
2014	2,225	15,753	9	17,987	3,550	10,836	14,386	210	3,391
2015	3,391	12,455	30	15,876	3,425	8,619	12,044	168	3,664
2016	3,664	16,601	5	20,270	3,221	14,303	17,524	60	2,686
2017	2,686	20,223	1	22,910	3,198	15,645	18,843	-30	4,097
2018	4,097	17,566	0	21,663	2,953	14,162	17,115	-88	4,636
2019	4,636	19,227	0	23,863	2,135	15,006	17,141	-146	6,868
2020 6/	6,868	14,061	0	20,929	2,385	15,586	17,971	-62	3,020
2021 7/	3,020	17,852	0	20,872	2,485	15,075	17,560	-47	3,359

COTTON: SUPPLY AND DISAPPEARANCE, ELS, 1991-2021

Marketing Year Beginning	Beginning Stocks 1/	Production2/	Imports	Total Supply 3/	Mill Use4/	Exports	Total Demand	Loss5/	Ending Stocks
1,000 480-POUND NET WEIGHT BALES EXTRA-LONG STAPLE									
1991	82	398	0	480	65	298	363	-4	121
1992	121	508	0	629	60	332	392	31	206
1993	206	370	0	576	72	307	379	-30	227
1994	227	338	2	567	89	424	513	-8	62
1995	62	368	8	438	109	300	409	-37	66
1996	66	529	0	595	106	466	572	-28	51
1997	51	548	0	599	115	440	555	-21	65
1998	65	442	12	519	147	288	435	-19	103
1999	103	674	44	821	139	447	586	-15	250
2000	250	389	8	647	124	437	561	-35	121
2001	121	700	15	836	104	397	501	7	328
2002	328	678	57	1,063	103	634	737	81	245
2003	245	432	41	718	62	519	581	71	66
2004	66	746	21	833	62	753	815	5	13
2005	13	630	19	662	51	558	609	-25	78
2006	78	765	9	852	39	635	674	-10	188
2007	188	852	6	1,046	36	833	869	21	156
2008	156	431	0	587	29	232	261	21	305
2009	305	400	0	705	21	694	715	-28	18
2010	18	504	7	529	26	495	521	-20	28
2011	28	851	6	885	22	594	616	0	269
2012	269	780	4	1,053	22	844	866	0	187
2013	187	634	7	828	23	680	703	0	125
2014	125	566	3	694	25	410	435	0	259
2015	259	433	3	695	25	534	559	0	136
2016	136	569	2	707	29	614	643	0	64
2017	64	700	2	766	27	636	663	0	103
2018	103	801	3	907	22	671	693	0	214
2019	214	686	3	903	15	506	521	0	382
2020 6/	382	547	1	930	15	785	800	0	130
2021 7/	130	346	5	481	15	425	440	0	41

1/ - Compiled from Bureau of the Census data and adjusted to an August 1 480-pound net weight basis. Excludes preseason ginnings. Beginning in 2012, stocks are estimated by USDA.

2/ - Includes preseason ginnings.

3/ - Totals made from unrounded data.

4/ - Adjusted to August 1-July 31 marketing year.

5/ - Difference between ending stocks based on Census data and preceding season's supply less disappearance. For upland cotton, this difference primarily reflects an increase of an estimated one percent in average bale weights due to moisture absorption once cotton is ginned and begins to flow through marketing channels.

6/ - Estimate.

7/ - Forecast.

U.S. PER CAPITA DOMESTIC COTTON CONSUMPTION, 1986-2020

Calendar Year	Mill Use	Textile Imports	Textile Exports	Net Trade 2/	Domestic Consumption 3/
Pounds					
1986	13.54	7.94	1.14	6.80	20.34
1987	15.46	9.62	1.23	8.39	23.85
1988	14.32	8.66	1.33	7.33	21.65
1989	16.36	9.49	1.95	7.53	23.89
1990	16.45	9.63	2.51	7.12	23.58
1991	17.15	10.17	2.61	7.56	24.71
1992	18.53	12.30	3.05	9.25	27.79
1993	18.97	13.67	3.47	10.20	29.17
1994	19.86	14.46	4.06	10.40	30.26
1995	19.44	15.17	4.89	10.27	29.71
1996	19.38	15.46	5.54	9.92	29.30
1997	19.94	18.36	6.43	11.93	31.87
1998	18.96	21.30	6.87	14.43	33.39
1999	17.77	23.51	7.19	16.32	34.08
2000	16.81	25.86	8.28	17.57	34.38
2001	13.49	25.33	7.10	18.22	31.71
2002	12.82	28.23	7.24	20.98	33.80
2003	11.10	30.05	7.55	22.49	33.59
2004	10.67	30.71	7.59	23.12	33.79
2005	10.25	33.58	7.47	26.12	36.37
2006	8.76	34.70	7.15	27.55	36.31
2007	7.67	34.39	6.27	28.12	35.79
2008	6.78	32.25	6.05	26.20	32.98
2009	5.14	28.69	4.87	23.82	28.96
2010	5.91	31.84	5.74	26.10	32.00
2011	5.49	27.45	5.89	21.56	27.05
2012	5.13	26.07	5.22	20.85	25.98
2013	5.42	26.75	5.51	21.24	26.66
2014	5.31	26.34	5.52	20.82	26.13
2015	5.33	27.48	5.76	21.72	27.05
2016	4.99	26.47	5.32	21.15	26.14
2017	4.78	26.53	5.22	21.31	26.09
2018	4.57	27.48	5.01	22.47	27.04
2019	4.31	27.23	4.89	22.34	26.65
2020	2.79	23.83	3.33	20.50	23.29

1/ U.S. apparent consumption of cotton and cotton textiles.2/

Imports minus exports.

3/ Mill use plus net trade.

Compiled by Economic Research Service, USDA, from Bureau of the Census data.

RAW COTTON EQUIVALENT OF U.S. EXPORTS OF DOMESTIC COTTON MANUFACTURES AND IMPORTS FOR CONSUMPTION OF COTTON MANUFACTURES, 1986-2020

Calendar Year	Total Exports		Total Imports	
	1,000 Pounds	1,000 Bales 1/	1,000 Pounds	1,000 Bales 1/
1986	274,828	572.6	1,910,474	3,980.2
1987	298,004	620.8	2,335,696	4,866.0
1988	330,266	688.1	2,118,775	4,414.1
1989	483,300	1,006.9	2,346,522	4,888.6
1990	626,983	1,306.2	2,408,443	5,017.6
1991	662,125	1,379.4	2,578,635	5,372.2
1992	782,418	1,630.0	3,159,493	6,582.3
1993	902,855	1,880.9	3,557,606	7,411.7
1994	1,069,552	2,228.2	3,809,936	7,937.4
1995	1,304,605	2,717.9	4,043,131	8,423.2
1996	1,493,821	3,112.1	4,170,429	8,688.4
1997	1,755,116	3,656.5	5,010,236	10,438.0
1998	1,897,240	3,952.6	5,881,961	12,254.1
1999	2,007,878	4,183.1	6,565,381	13,677.9
2000	2,339,224	4,873.4	7,301,542	15,211.5
2001	2,026,591	4,222.1	7,225,996	15,054.2
2002	2,086,470	4,346.8	8,131,767	16,941.2
2003	2,196,912	4,576.9	8,737,960	18,204.1
2004	2,226,258	4,638.0	9,012,203	18,775.4
2005	2,211,545	4,607.4	9,947,656	20,724.3
2006	2,136,877	4,451.8	10,373,973	21,612.4
2007	1,893,478	3,944.7	10,385,844	21,637.2
2008	1,843,719	3,841.1	9,829,113	20,477.3
2009	1,498,247	3,121.3	8,820,812	18,376.7
2010	1,779,108	3,706.5	9,861,621	20,545.0
2011	1,837,476	3,828.1	8,564,312	17,842.3
2012	1,639,967	3,416.6	8,190,888	17,064.4
2013	1,742,081	3,629.3	8,464,276	17,633.9
2014	1,759,241	3,665.1	8,395,744	17,491.1
2015	1,848,566	3,851.2	8,820,451	18,375.9
2016	1,718,585	3,580.4	8,558,382	17,830.0
2017	1,697,404	3,536.3	8,629,100	17,977.3
2018	1,637,970	3,412.4	8,988,247	18,725.5
2019	1,605,840	3,345.5	8,948,013	18,641.7
2020	1,097,952	2,287.4	7,855,746	16,366.1

1/ Bales of 480-pound net weight.

Compiled by Economic Research Service, USDA, from Bureau of the Census data.

MANMADE FIBERS: U.S. MILL CONSUMPTION, 1984-2016

Calendar Year	Cellulosic	Noncellulosic	Total
	Million pounds		
1984	587.9	7,378.2	7,966.1
1985	545.6	7,679.9	8,225.5
1986	608.3	8,044.4	8,652.7
1987	585.6	8,480.1	9,065.7
1988	612.4	8,595.0	9,207.4
1989	611.3	8,616.8	9,228.1
1990	604.5	8,448.1	9,052.6
1991	564.2	8,535.7	9,099.9
1992	565.4	8,941.2	9,498.9
1993	606.2	9,334.1	9,928.5
1994	544.6	9,982.6	10,527.2
1995	507.8	9,799.3	10,307.1
1996	472.9	10,035.8	10,508.7
1997	448.2	10,622.7	11,070.9
1998	382.5	10,694.3	11,076.8
1999	330.4	11,015.8	11,346.2
2000	301.5	11,074.6	11,376.1
2001	222.3	9,974.6	10,197.0
2002	203.0	10,336.7	10,539.7
2003	176.6	10,012.6	10,189.3
2004	181.7	10,111.2	10,292.9
2005	165.1	10,051.4	10,216.5
2006	174.3	9,266.5	9,440.9
2007	239.2	9,035.3	9,274.5
2008	209.9	7,917.7	8,127.6
2009	189.2	6,627.7	6,816.9
2010	190.8	7,459.8	7,650.6
2011	186.5	7,127.1	7,313.6
2012	181.7	7,620.5	7,802.3
2013	163.4	7,909.6	8,073.0
2014	182.9	8,117.8	8,300.7
2015	198.5	8,445.4	8,643.9
2016	206.4	8,460.3	8,666.7

Note: Fiber Organon no longer published.
 Compiled by Economic Research Service, USDA, from Fiber Organon and Bureau of the Census data.

List of USDA and other relevant web sites:

USDA Production, Supply, and Demand Estimates: On line access to USDA's historical and forecast data for cotton production, consumption, and trade for 120 countries.

<https://apps.fas.usda.gov/psdonline/app/index.html#/app/home>

Cotton and Wool Outlook (CWS): Economic Research Service, U.S. Department of Agriculture. Description: Monthly. Provides information and statistics on domestic and world cotton and wool production, consumption, export sales, use, and prices, including data on raw fibers and textiles. <https://usda.library.cornell.edu/concern/publications/n870zq801?locale=en>

The USDA Economics, Statistics & Market Information System: Contains nearly 300 reports and datasets from the economics agencies of the U.S. Department of Agriculture. These materials cover U.S. and international agriculture and related topics. Most reports are text files that contain time-sensitive information. Most data sets are in spreadsheet format and include time-series data that are updated yearly. <http://usda.mannlib.cornell.edu/>

The USDA Baseline provides: Long run projections for the U.S. agricultural sector through 2023. Projections cover selected agricultural commodities and agricultural trade, and aggregate indicators such as farm income and food prices. As "baseline" projections, they represent one plausible scenario for the next ten years, and reflect both model results and judgment http://www.ers.usda.gov/topics/farm-economy/agricultural-baseline-projections.aspx#.VBc2a_ldV8E

AMS The Cotton Program: The program promotes the orderly and efficient marketing of cotton by preparing, distributing, and encouraging the use of universal cotton classification standards, and by providing cotton classification and market news that meet the needs and expectations of the cotton and textile industries. <http://www.ams.usda.gov/cotton/index.htm>

USDA AMS Market News Reports - Cotton Reports: AMS provides current, unbiased price and sales information to assist in the orderly marketing and distribution of farm commodities. <http://www.ams.usda.gov/market-news/cotton>

USDA - National Agricultural Statistics Service Reports by Commodity:

<https://www.nass.usda.gov/Publications/index.php>

World Agricultural Outlook Board WASDE REPORT: The World Agricultural Supply and Demand Estimates (WASDE) report is available electronically within one hour of release.

<http://www.usda.gov/oce/commodity/wasde/index.htm>

Farm Service Agency (FSA): The Farm Service Agency provides "Program Fact Sheets" in Portable Document Format (PDF) on all commodity programs including cotton.

<https://www.fsa.usda.gov/news-room/fact-sheets/index>

Export Credit Guarantee Programs: The Commodity Credit Corporation (CCC), U.S. Department of Agriculture, administers export credit guarantee programs for commercial financing of U.S. agricultural exports. <http://www.fas.usda.gov/excredits/ecgp.asp>

United States Farm Bill: Information on the U.S. Farm Bill.

<https://www.fsa.usda.gov/programs-and-services/farm-bill/index>