INTERNATIONAL COTTON ADVISORY COMMITTEE

Specialty Cotton Report

ELS and LS Cotton

World production, consumption and trade by country figures

Identity Cotton

Production levels by programme

INTERNATIONAL COTTON ADVISORY COMMITTEE

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Author's Remarks

The origins of the Specialty Cotton Report began with the creation of the ICAC's Extra Fine Report. This dates back to the late 1980s when, for the first time, ICAC member governments asked the Secretariat to publish information on long staple (LS) and extra-long staple (ELS) cotton; At the time, the LS and ELS varieties were gaining relevance, but over the years, production levels dropped. This required us to reconsider the publication's value and relevance.

At the same time, the cotton sector continued to evolve. The sector embraced climate change and sustainability more closely and saw the rise of the new value-oriented consumer who demanded cotton that is climate friendly, sustainable, ensures fair prices to its producers, supports livelihoods and gender equality, and protects the environment. To meet the needs of this new type of consumer, the cotton value chain saw the creation of multiple identity programs and certifications, many of which are benchmarked with each other, while others stand alone.

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Author's Remarks

Driven by rising production under identity programs and increasing efforts by governments to produce these specialized ELS and LS cottons, the lack of standardization in defining these types of cotton across national boundaries and the presence of multiple identity programs has necessitated the creation of a focused Specialty Cotton Report. For the purposes of this report, "specialty cotton" is any LS or ELS cotton, as well as cotton that falls under a specific identity program. Consequently, all kinds of long staple cotton, extra-long staple cotton, and cotton produced under a specific identity program are now covered by ICAC in this report. We welcome comments and suggestions as this publication continues to evolve Parkhi@icac.org

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SPECIALITY COTTON PRODUCTION

Total specialty cotton production in the 2023/24 season reached 8 million tonnes, 9% higher than the previous season, the highest level recorded so far and one that is increasing every year. It comprises about 33% of total world cotton lint production in the 2023/24 season, up by 3% from 2022/23.

Within specialty cotton, total ELS and LS cotton production recorded a 30% fall in the 2023/24 season compared to the previous season, mostly due to depressed prices. Almost all the major producers of ELS and LS cotton — the US, Egypt, and China — reported a fall in production primarily due to weak prices and a shorter season that discouraged producers from planting ELS and LS cotton. Both ELS and LS together account for around 1% of total world cotton production.

The situation has since rebounded and the area planted and production under ELS and LS jumped in the 2024/25 season estimates by 19% to reach 390,000 tonnes. The 2024/25 season estimates and a detailed analysis of ELS and LS cotton market players are covered in this report in the ELS and LS section.

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Total cotton lint production under identity programs increased by 11% in the 2023/24 season compared to the previous season to reach 7.7 million tonnes, comprising 32% of total world production. Almost all the leading identity programs rose in the 2023/24 season: a major increase is coming from US Cotton Trust Protocol (up about 24% due to new enrollments), as well as Cotton made in Africa (CmiA) due to major expansions in Cote d'Ivoire, Cameroon, and Benin, among other regions.

Production in the Responsible Brazilian Cotton Program (ABR) is about 15% higher than the previous season, as Brazil witnessed an impressive yield and a massive crop. The country successfully increased the total percentage of its crop certified under the ABR program, BCI, and equivalent and myBMP also increased their levels of certifications, major reason is good crop year and increased enrollment.

Among the leading identity programs, the Better Cotton Initiative and equivalents dominate cotton production, accounting for about 23% of total world cotton production in 2023/24 season, up by 4% from the previous season. The ABR alone accounts for 12% of world production and is also BCI equivalent. A detailed analysis of identity programs is covered in the report.

SPECIALTY COTTON PRODUCTION					
000 MT					
	2019/20	2020/21	2021/22	2022/23	2023/24
Total world cotton production	26052	24550	25054	24774	24170
Total Specialty Cotton production		6313	7261	7379	8065
Total ELS and LS cotton production		391	326	467	329
Total cotton production under Identity programs	6858	5922	6935	6912	7736
Leading ELS and LS cotton producers					
- United States		117	71	101	68
- Egypt		73	76	119	70
- India		86	85	100	100
- China		65	40	85	27
Leading Identity Programs					
BCI and Equivalents	6087	4694	5441	5441	5637
Responsible Brazilian Cotton (ABR) Program (Brazil)*	2250	1990	2143	2644	3003
myBMP (Australia)*	31	142	382	381	408
Cotton made in Africa	630	677	716	508	631
Organic cotton as reported by Textile Exchange"	249	342	342	540	540
The e3 Sustainable Cotton Programme by BASF"	161	215	258	258	258
REEL cotton program	140	187	155	219	224
US cotton Trust Protocol	105	240	367	338	420
NOTES					
*Also a part of BCI and equivalent and is counted under it					
"held constant as last season					
All figures are approximates based on collected data and ICAC calculations in aug to july months.					
Subject to some level of double counting if the ELS and LS production was covered under an identity program.					

SPECIALTY COTTON PRODUCTION					
Percentage of total world production					
As a percentage of total world production	2019/20	2020/21	2021/22	2022/23	2023/24
Total world cotton production		100	100	100	100
Total Specialty Cotton production		26	29	30	33
Total ELS and LS cotton production		2	1	2	1
Total cotton production under Identity programs		24	28	28	32
Leading ELS and LS cotton producers					
- United States		0.5	0.3	0.4	0.3
- Egypt		0.3	0.3	0.5	0.3
- India		0.4	0.3	0.4	0.4
- China		0.3	0.2	0.3	0.1
Leading Identity Programs					
BCI and Equivalents		19	22	22	23
Responsible Brazilian Cotton (ABR) Program (Brazil)*		8	9	11	12
myBMP (Australia)*		1	2	2	2
Cotton made in Africa		3	3	2	3
Organic cotton as reported by Textile Exchange"		1	1	2	2
The e3 Sustainable Cotton Programme by BASF"		1	1	1	1
REEL cotton program		1	1	1	1
US cotton Trust Protocol		1	1	1	2
NOTES					
*Also a part of BCI and equivalent and is counted under it					
"held constant as last season					
All figures are approximates based on collected data and ICAC calculations in Aug to July months.					
Subject to some level of double counting if the ELS and LS production was covered under an identity program.					

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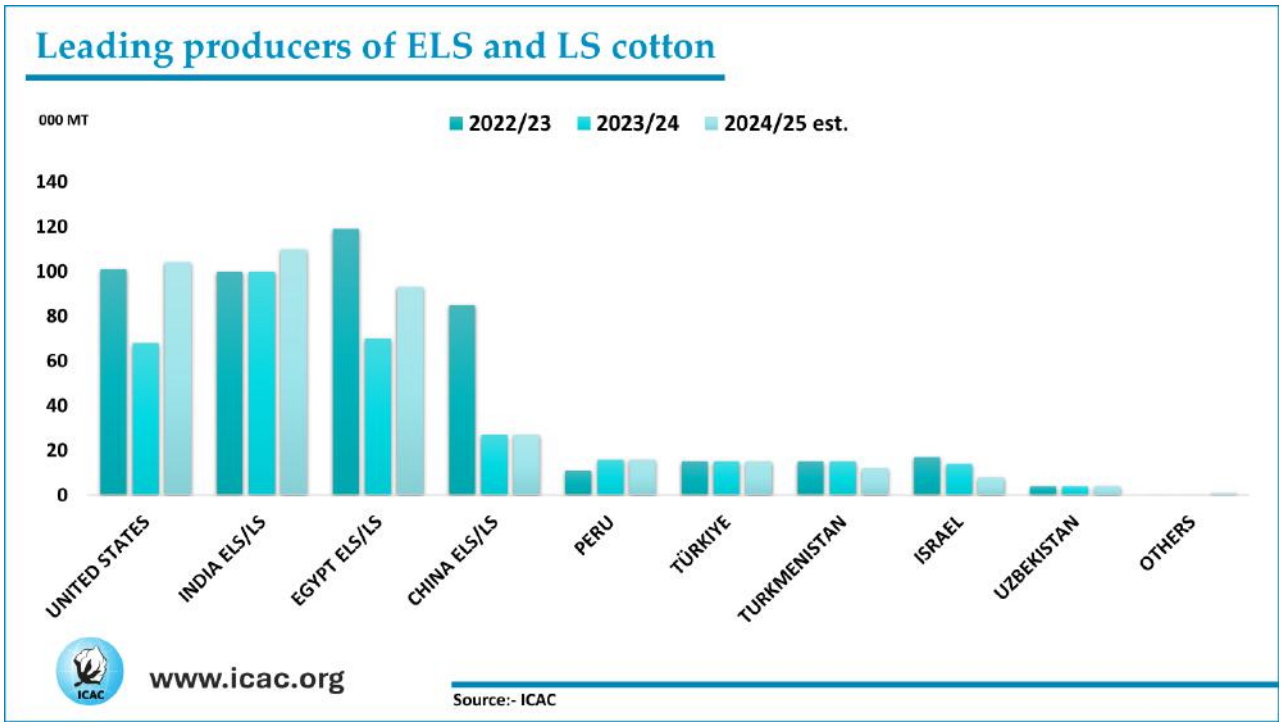
LONG STAPLE AND EXTRA LONG STAPLE VARIETIES OF COTTON

ELS AND LS COTTON

ELS and LS cotton form only a small part of global cotton lint production, comprising on average around 1% to 2% of total world production on average. Over the years, the production of ELS and LS cotton declined due to their limited demand and relatively demanding production needs.

The definitions of LS and ELS cotton are not globally standardized, and each producing and consuming country has its own standards to define ELS and LS cotton. Global trade for these types of cotton is usually conducted using internationally unharmonized HS codes, which makes demand, supply, and trade analysis a difficult task. It is often seen that exporting countries consider a consignment as long staple (based on their national definition); however, the same consignment is considered extra-long staple by the importing country (based on their national definition).

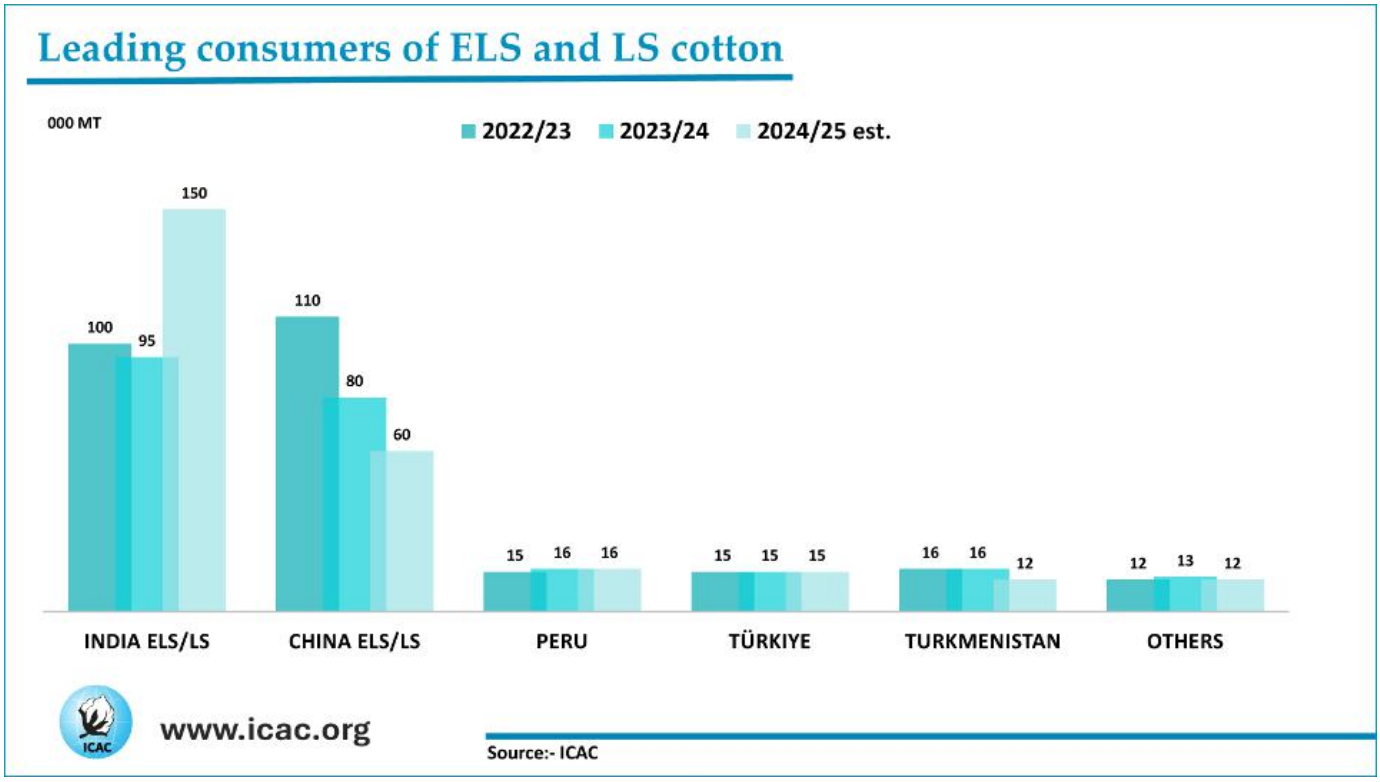


In the 2023/24 season, ELS and LS cotton lint production decreased by 30% mostly because of depressed prices — but in the 2024/25 season the situation improved, with LS and ELS cotton lint production increasing by 19% to reach 390,000 metric tonnes. For 2025/26, India is estimated to lead ELS and LS cotton lint production with 110,000 tonnes, closely followed by the US, Egypt, China, Peru and others. India's production pattern is in alignment with the previous seasons, whereas US and Egypt's production is on a revival trajectory after the slow 2023/24 season. More details are under the country analysis section.

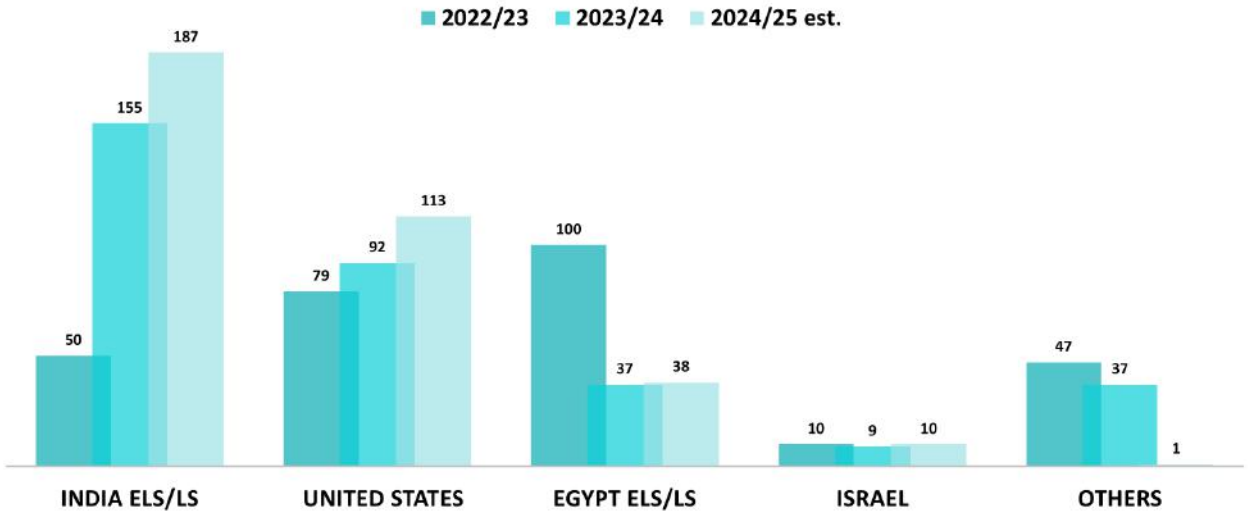
Consumption of ELS and LS cotton was led by India with 150,000 tonnes. There has been a significant increase in India's imports and consumption patterns in the 2024/25 season. India's total cotton lint imports also saw a significant increase, jumping by 232% in the 2024/25 (est.) season compared to 2023/24. Adding to this major boost in imports and consumption, the government's Central Board of Indirect Taxes and Customs (CBIC) announced exemptions of all usually applied duties (currently 11%) for all imports under heading 5201, which covers raw cotton between 19th August 2025 and December 2025, a move that will increase access to the Indian cotton market and boost cotton lint imports.

Based on India's domestic demand and import figures, we have revised their consumption mill use demand in an upward direction. India will be followed by China, Peru, Türkiye, Turkmenistan, amongst others.

There are slight decreases in the levels of imports and consumption from China in the 2024/25 season, matching the pattern of their overall imports of cotton lint 5201, major reasons are ample domestic production in the same season and China's dependence on other types of fibers. As indicated above, imports are led by India followed by China, Vietnam, Peru, Bangladesh, and others. Exports are also led by India followed by the US, Egypt, and Israel who primarily grow ELS/LS cotton with the purpose of exports. India's export and import varieties differ from each other and details are mentioned under country analysis section of the report.



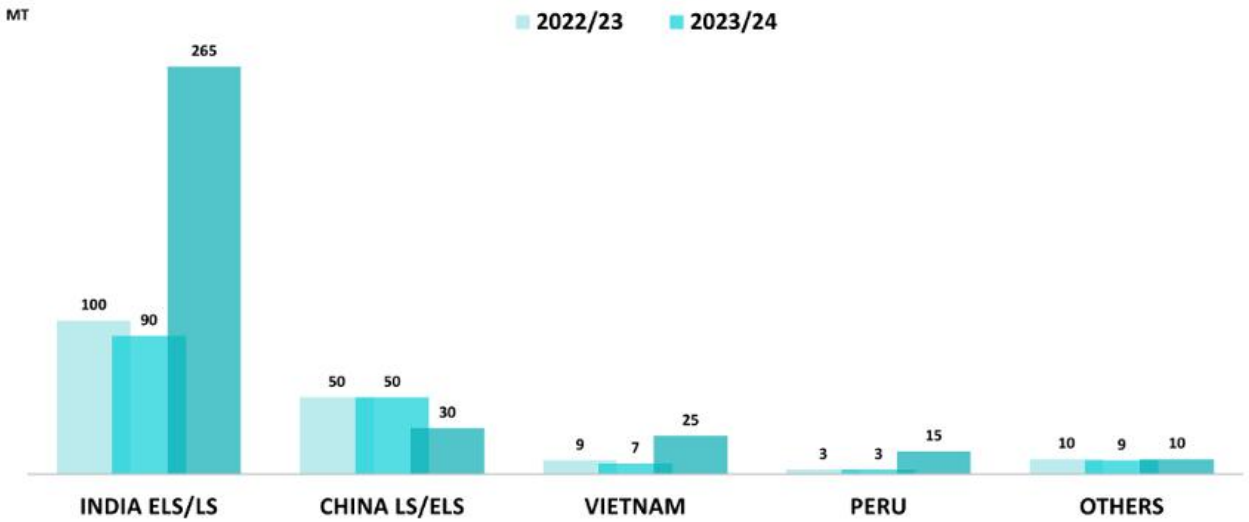
Leading exporters of ELS and LS cotton



www.icac.org

Source:- ICAC

Leading importers of ELS and LS cotton



www.icac.org

Source:- ICAC

LONG AND EXTRA LONG STAPLE COTTON					
Aug- July Approximately					
000 MT					
	2020/21	2021/22	2022/23	2023/24	2024/25 est.
PRODUCTION					
CHINA LS/ELS	65	40	85	27	27
EGYPT ELS	3	4	7	7	7
EGYPT LS	70	72	112	63	86
INDIA ELS				20	20
INDIA LS	86	85	100	80	90
ISRAEL	6	5	17	14	8
PERU	6	9	11	16	16
TURKMENISTAN	20	20	15	15	12
TÜRKIYE	17	15	15	15	15
UNITED STATES	117	71	101	68	104
UZBEKISTAN	1	4	4	4	4
OTHERS	0	1	0	0	1
TOTAL	391	326	467	329	390
CONSUMPTION					
BANGLADESH	10	4	7	2	3
CHINA LS/ELS	125	120	110	80	60
INDIA ELS				40	50
INDIA LS	171	190	100	55	100
PAKISTAN ELS	3	6	5	0	0
PAKISTAN LS	70	68	68	5	5
PERU	15	20	15	16	16
TURKMENISTAN	23	21	16	16	12
TÜRKIYE	15	16	15	15	15
VIETNAM	14	9	8	8	9
OTHERS	10	4	12	13	12
TOTAL	456	458	356	250	282

LONG AND EXTRA LONG STAPLE COTTON					
Aug- July Approximately					
000 MT					
	2020/21	2021/22	2022/23	2023/24	2024/25 est.
EXPORTS					
EGYPT ELS	5	3	6	2	4
EGYPT LS	84	61	94	35	34
INDIA ELS				5	4
INDIA LS	20	11	50	150	183
ISRAEL	5	12	10	9	10
UNITED STATES	179	116	79	92	113
OTHERS	18	30	47	37	1
TOTAL	311	233	286	330	349
IMPORTS					
BANGLADESH	13	5	5	3	3
CHINA LS/ELS	50	50	50	50	30
INDIA ELS				45	65
INDIA LS	112	100	100	45	200
PAKISTAN ELS	3	6	5	0	0
PAKISTAN LS	87	75	75	1	1
PERU	10	13	3	3	15
VIETNAM	17	8	9	7	25
OTHERS	12	0	10	9	10
TOTAL	304	257	255	163	349

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COUNTRY ANALYSIS

EGYPT

Egypt's cotton lint production fell in 2023/24 season to 70,000 tonnes due to lower prices or the expectation of lower prices which led to lower harvested area. Egypt's exports in the 2023/24 season were largely impacted, as they fell from 100,000 tonnes in 2022/23 season to 37,000 tonnes in the 2023/24 season.

Many reasons contributed to the decline. During the 2022/23 season, when the local currency underwent a sharp devaluation, shipped quantities reached nearly 90,000 tonnes and ended up at 100,000 tonnes. Prices were exceptionally low, and the gap between Giza LS and Index A cotton was unusually narrow, which encouraged buyers to carry larger volumes for use during the 2023/24 season. In November 2023, the Egyptian government introduced an export cap of 40,000 tonnes from the 2023/24 crop, later increased to 45,000 tonnes.

Further in March 2024, there was devaluation of Egyptian currency due to high inflation in 2023. In addition to these factors, in 2023, Egypt faced multiple economic challenges, including energy and food crises fueled by the Russia-Ukraine conflict, conflicts at the Red Sea which impacted their shipments, and pandemic-related slowdowns, among others. The situation has since then slightly improved; the 2024/25 season did not have the same negative impacts, and production was able to reach about 93,000 tonnes. Exports haven't completely recovered and are expected to remain at about 38,000 tonnes.

Characteristics of Egyptian Cotton Varieties season 2024/2025 Until June 2025

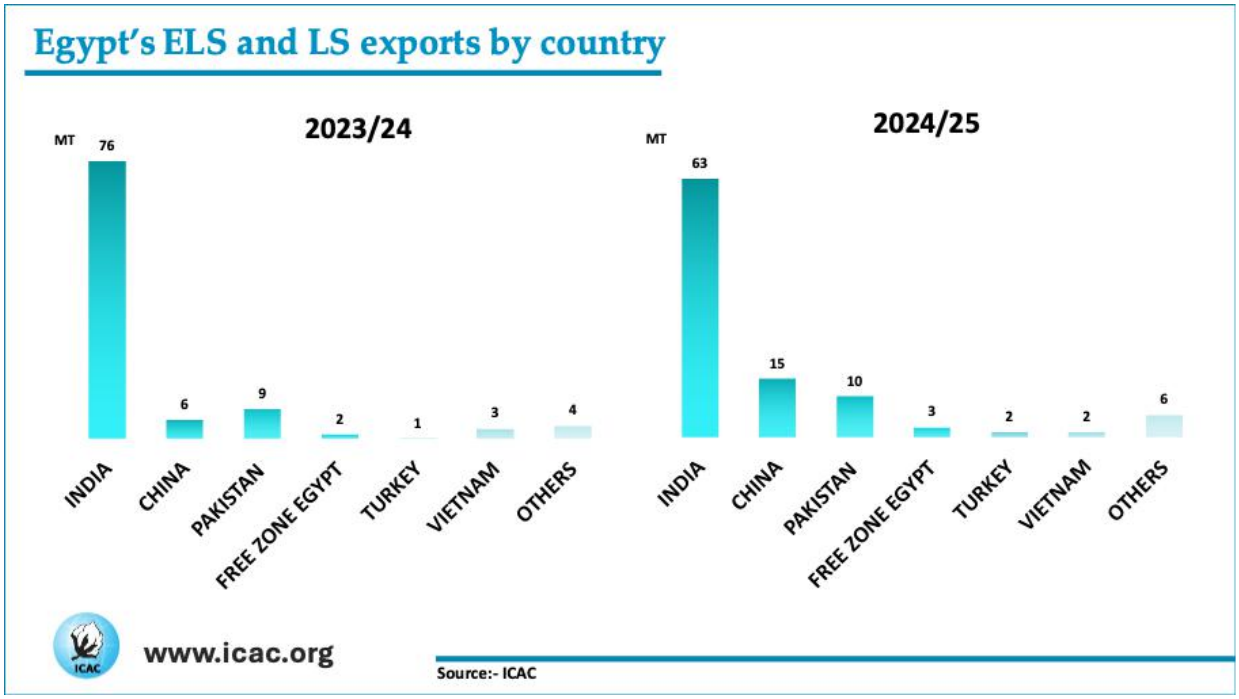
(Average results)

Properties \ Variety		Extra Giza 45	Extra Giza 87	Extra Giza 93	Extra Giza 96	Extra Giza 92	Super Giza 86	Super Giza 94	Super Giza 97	Giza 95	Giza 98
Upper Half Mean Length	U.H.M.L (mm)	35.99	36.59	37.14	36.32	33.94	33.20	34.41	33.78	29.82	30.79
Uniformity	(%)	87.7	88.1	87.7	87.6	87.2	86.2	86.6	85.8	83.2	84.6
Short Fiber Index	(%)	5.4	5.4	5.4	5.4	5.6	6.0	5.6	5.9	8.1	7.3
Strength	(gram/tex)	43.6	43.4	44.8	45.3	46.3	43.6	41.0	42.7	35.9	35.3
Micronaire Reading		3.38	3.50	3.12	3.84	3.66	4.56	3.71	3.73	3.66	4.03
Reflectance degree	Rd	74.5	74.2	67.4	74.7	77.0	74.2	75.1	75.2	68.6	67.5
Yellowness degree	+b	8.6	8.3	10.9	8.8	8.4	9.1	9.0	9.0	11.4	12.3
Spinning Consistency Index	SCI	218	219	222	219	218	194	199	199	156	160
Percent of Maturity	(%)	85	86	72	81	81	86	77	79	79	84
Fineness	(Militex)	124	126	131	151	141	166	147	149	148	154
Trash	(%)	3.5	3.1	3.4	3.4	3.6	3.5	3.6	3.3	3.9	3.2
Neps Count	Nep/gram	213	136	207	173	170	138	198	181	176	154

EGYPT'S ELS AND LS EXPORTS BY VARIETY											
			2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
EXTRA LONG STAPLE COTTON		Extra Giza 45						21	113		10
		Extra Giza 87						238	50		10
		Extra Giza 96						836	3611	1521	2654
		Extra Giza 93						110	16	13	31
		Extra Giza 92						1318	2621	572	769
		G93*71									2
		TOTAL ELS	839	3633	3626	3052	4704	2523	6411	2106	3475
LONG STAPLE COTTON	LOWER (DELTA REGION)	Extra Giza 86						4771	8657	2110	3780
		Extra Giza 94						49510	77698	27165	25870
		Extra Giza 97						514	2288	832	775
	UPPER (UPPER EGYPT)	Giza 95						6317	5165	4692	3494
		Giza 98									48
		TOTAL LS	37813	52253	84559	67216	83732	61112	93808	34799	33967
		TOTAL ELS AND LS	38652	55886	88185	70268	88436	63635	100219	36905	37441

Source:- ICAC compilation based on ALCOTEXA

Government intervention has played a very important role in supporting the ELS and LS cotton lint market. A new cotton marketing system launched in 2019 is governed by Egypt's Ministry of Agriculture, Ministry of Public Business Sector, CATGO, the Agriculture Bank of Egypt, chairman of the general committee of cotton trade regulation in Egypt, and representatives of cotton trading companies. The system encourages cotton cultivation by ensuring guaranteed prices. These prices are based on public bidding, which sets the auction opening price linked to international cotton prices and adds a price premium based on the quality of the cotton. These prices are announced ahead of cultivation, which has provided a major boost to production by promising better farm gate prices.



INDIA

India is a major market for ELS and LS cotton production and consumption. Total production of ELS and LS cotton in India in the 2024/25 season was about 110,000 tonnes, highest in the world and 10% higher than the previous season, comprising 0.4% of total world cotton production. Production is projected to remain the same in the next season.

The increase is attributed to a special status and increased investments by the Indian government. ELS cotton also received a special mention in the 2023 financial budget, and five new HS lines were created to cover the LS and ELS trade.

Domestic demand for ELS and LS cotton outpaces the production levels in India; therefore, it relies on imports. There has been a significant increase in India's imports and consumption pattern in the 2024/25 season, based on which we have made major upward revisions in India's trade and consumption capacity.

Several assumptions were used to arrive at final figures for India. This year, we also report separately on India's ELS and LS demand and supply metrics and have covered the data for 2023/24 and 2024/25. For exports, it is assumed that India exports under the ELS cotton, Indian cotton of staple length 34.5 mm and above using HS code at 8 digit of 52010019 and for LS cotton exports is considered to be of Indian cotton of staple length above 29.5 mm and below 34.5 mm for this HS code 52010015 is used and assumption are drawn to arrive at figure above 29.5mm.

For LS cotton imports, assumptions have been made to arrive at cotton 29.5 mm above and below 32mm for which cotton, other than Indian, of staple length exceeding 27.0 mm but not exceeding 32.0 mm has been used considering HS code 52010024. For ELS cotton imports by India Cotton, other than Indian, of staple length exceeding 32.0 mm of HS code 52010025 has been considered.

In February 2024, the Indian government also removed the import duty on cotton that exceeds the length of 32 mm. India sources most of its ELS and LS cotton from Egypt and the United States and in August 2025, import duties were removed from all raw cotton until December 2025.

Every year at the beginning of the cotton season, the Commission for Agriculture Costs and Prices (CACP) announce the Minimum Support Price (MSP) for cotton to incentivize growers and support production.

CHINA

China's ELS and LS cotton lint production have fallen drastically in the last two seasons to reach 27,000 tonnes in 2024/25 estimates, down from 85,000 in 2022/23 due to poor conditions for growing cotton and a dramatic fall in prices for ELS and LS cotton in the 2022/23 season. It is currently estimated to remain about 27,000 tonnes, the lowest in the last few seasons. Some of the area under cotton was also resown due to poor weather conditions. Even consumption of ELS and LS cotton has fallen in the 2024/25 season to reach 60,000 tonnes.

ISRAEL

Israel's cotton production in the 2024/25 season is estimated to be about 8,000 tonnes. Israel defines ELS as having a staple length between 39 mm to 42 mm, with LS cotton having a staple length between 36 mm and 40 mm. Israel produces cotton for exporting. In terms of exports, Israel's top destination is China, India and Vietnam.

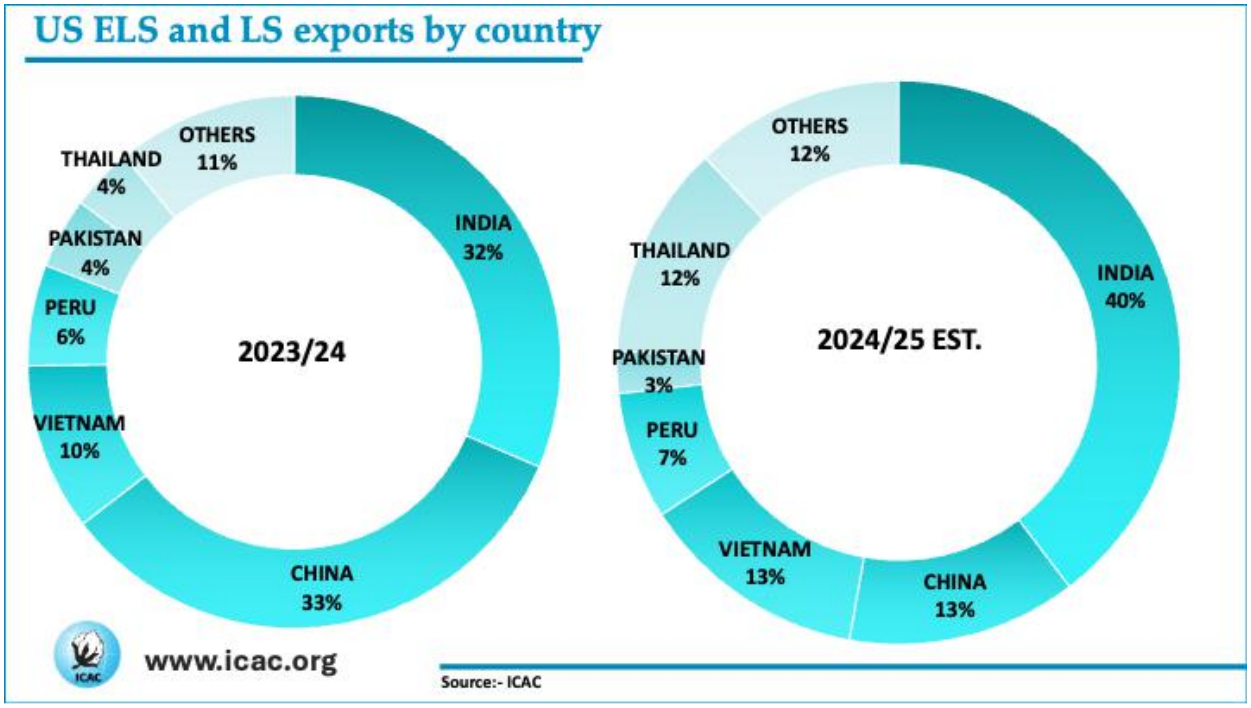
Type	Length (mm)	Fineness (Micronaire)	Strength (GPT)
Israeli Pima ELS	39 - 42	3.7 – 4.5	43 +
Israeli LS (Acalpi)	36 - 40	3.4 – 4.2	36 +

UNITED STATES

All production reported for the United States in this report is of ELS (Pima) cotton, which means any of the following varieties of cotton which are produced in the United States and is ginned on a roller gin:-

- American Pima;
- All other varieties of the Gossypium barbadense species of cotton, and any hybrid thereof;
- Any other variety of cotton in which one or more of these varieties predominate.

US Pima production has been fluctuating in the last few seasons. In 2022/23, it increased by 42%; however, it recorded a fall of 33% in the 2023/24 season. In 2024/25, production rebounded by 53% to reach 104,000 tonnes. The fluctuations in Pima cotton production are mainly caused by weather conditions in California (highest Pima cotton-growing state) and changes in prices. California is considered to have the best conditions for Pima cotton production.



High prices drove increased area planted in 2022/23 despite a water shortage in California. In 2023/24, prices declined and there was a shortened season that discouraged producers from planting Pima. The 2024/25 season did not have these same constraints, so area planted and production recovered, especially in California.

In terms of yields, ELS cotton experiences a higher yield than upland cotton, mainly because ELS cotton is irrigated while much of upland production is usually not. Even after experiencing fluctuations in production, the United States continues to remain one of the leading producers and exporters of ELS cotton in the world. By country, the US exports most of its ELS cotton to India, China, and Vietnam, together comprising around 70% to 80% of total US ELS exports.

OTHER PLAYERS

Turkmenistan's ELS and LS cotton production is estimated to be about 12,000 tonnes in the 2024/25 season, with most consumed domestically as usual.

Türkiye consumed about 15,000 tonnes of ELS and LS cotton in the same season. It consumes most of its domestic production and also sources small amounts of ELS cotton from the US.

Peru is estimated to produce around 16,000 tonnes of ELS and LS cotton in the 2024/25 season, similar to the previous season. In Peru, about 70% of production is of the LS Tanguis variety. Peru imports 99% of its total cotton from the United States, including all its ELS and LS varieties of cotton.

Pakistan was one of the world's leading consumers and importers of ELS and LS cotton. Pakistan consumption fell from 73,000 tonnes in 2022/23 to 5,000 tonnes in 2024/25, mainly due to a major shift in importing and consuming ELS and LS varieties of cotton. Pakistan defines ELS cotton as having a staple length exceeding 31 mm, and it defines LS cotton as having a staple length exceeding 28.5 mm but not exceeding 31 mm.

Pakistan meets its domestic consumption needs through imports and mostly sources ELS cotton from Egypt and the US. LS cotton is most heavily sourced from Brazil, the United States, and Côte d'Ivoire.

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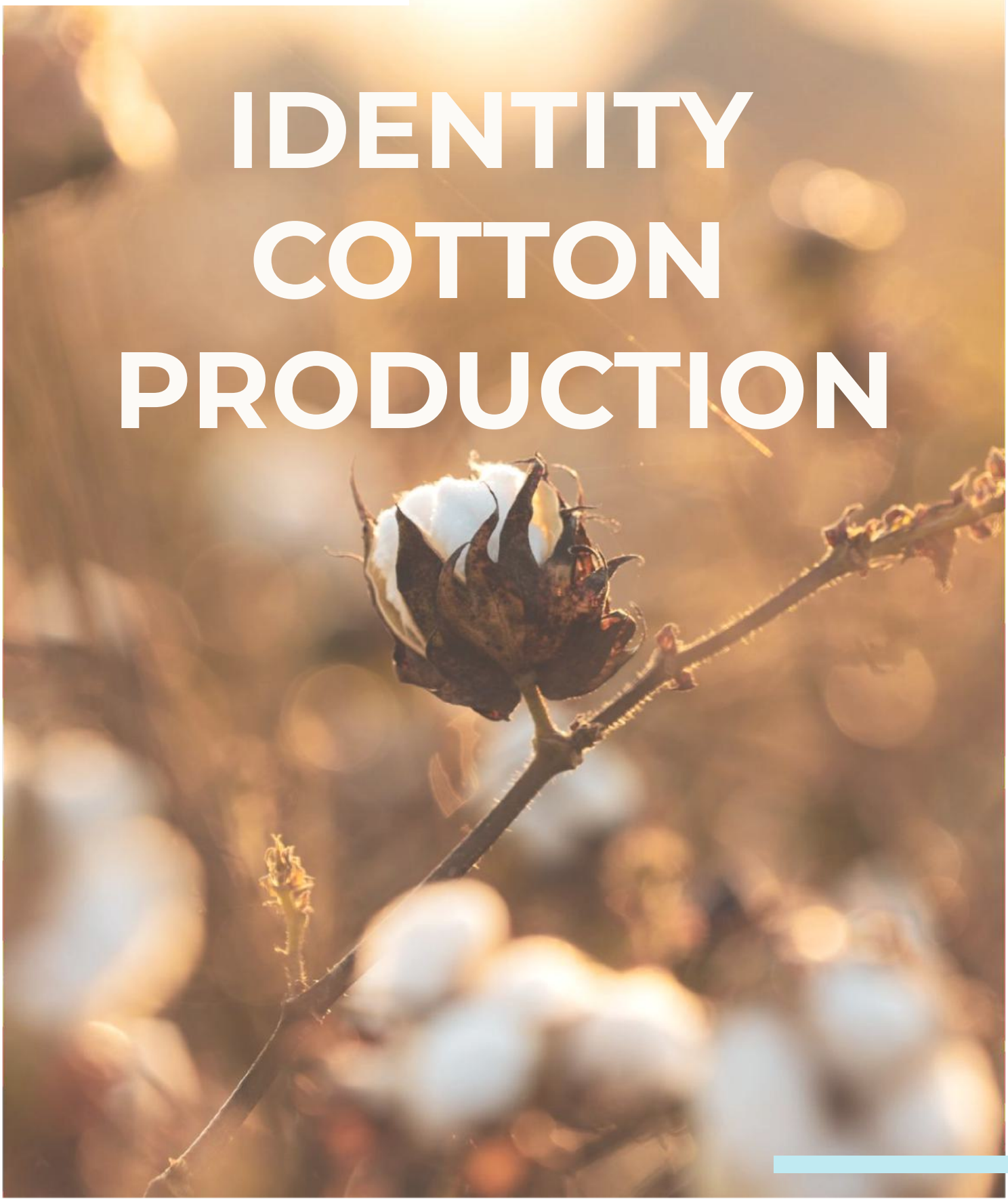
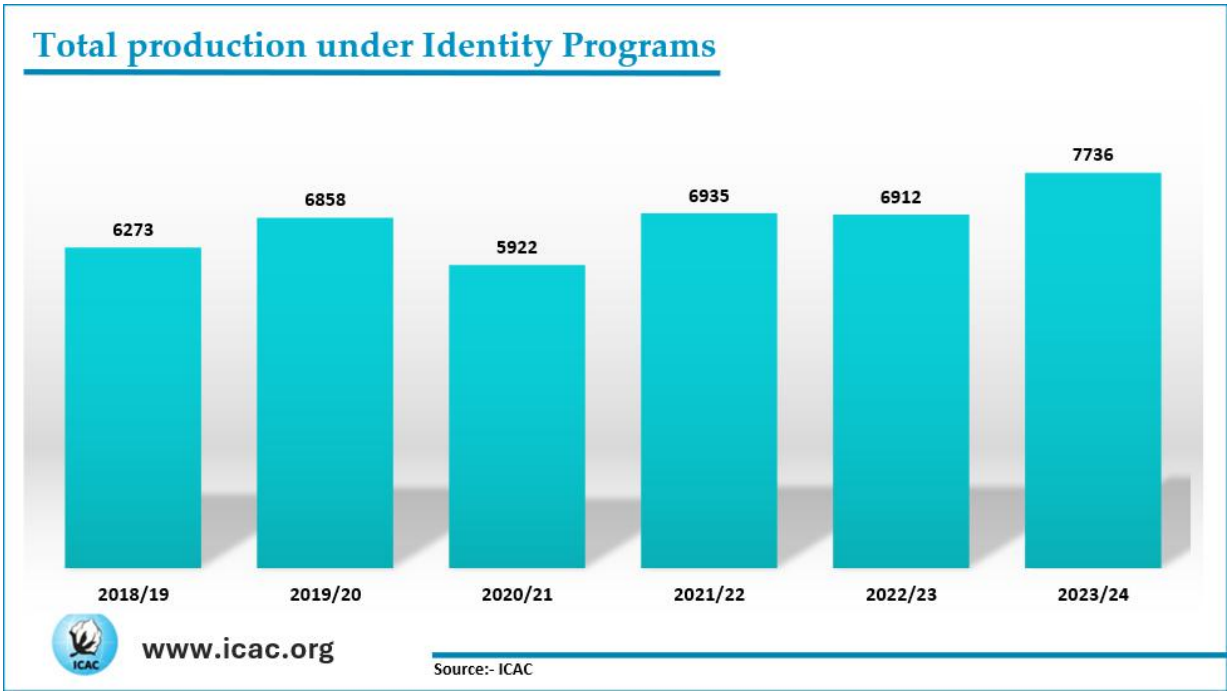
IDENTITY COTTON PRODUCTION



IDENTITY COTTON

Cotton production under identity programs has been increasing in recent years. Production in the 2023/24 season was 11% higher, reaching 7.7 million tonnes. The increase in identity program certifications stems from consumer and brand demands for sustainable and traceable cotton.

In the 2023/24 season, all the identity programs together comprised about 32% of total world cotton production. Better Cotton Initiative and its equivalents are the largest identity programs in the world, representing about 73% of total cotton under identity programs. Better Cotton Initiative and its equivalents are followed by organic cotton as reported by Textile Exchange, CmiA, and the US Cotton Trust Protocol, among others.



WORLD COTTON LINT PRODUCTION UNDER IDENTITY PROGRAMS						
000 MT						
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Total production under Identity programs	6273	6858	5922	6935	6912	7736
BCI and Equivalents	5635	6087	4694	5441	**5441**	**5637**
- BCI with out equivalents	2931	3135	1934	2361	**1885**	**2100**
- Responsible Brazilian Cotton (ABR) Program (Brazil)	2170	2250	1990	2143	2644	3003
- myBMP (Australia)	92	31	142	382	381	408
- ICPSS (Israel)	9	9	6	5	17	14
- Agro-2 (Greece)			23	54	93	113
Climate Beneficial Cotton			0.11	0.32	0.39	0.20
Cotton made in Africa	593	630	677	716	508	631
International Sustainability and Carbon Certification (ISCC)	137	133	148	129	3	0
Organic cotton as reported by Textile Exchange	240	249	342	342	540	540*
The e3 Sustainable Cotton Programme by BASF	23	161	215	258	258	258*
Fairtrade cotton	17	16	18	18	20	20*
REEL cotton program	61	140	187	155	219	224
Regenarative Organic Alliance		0	0	2	4	6
US cotton Trust Protocol		105	240	367	338	420

1. All figures are approximates based on collected data.

2. Data source :- direct data collection from BC, ABR, myBMP, ICPSS, US CTP, CMIA, Climate Benefical Cotton, ROA and REEL.

3. For BASF e3, Fairtrade,ISCC, organic cotton as collected by TE figures are assumed same at last season at the time of this edition and is subject to change.

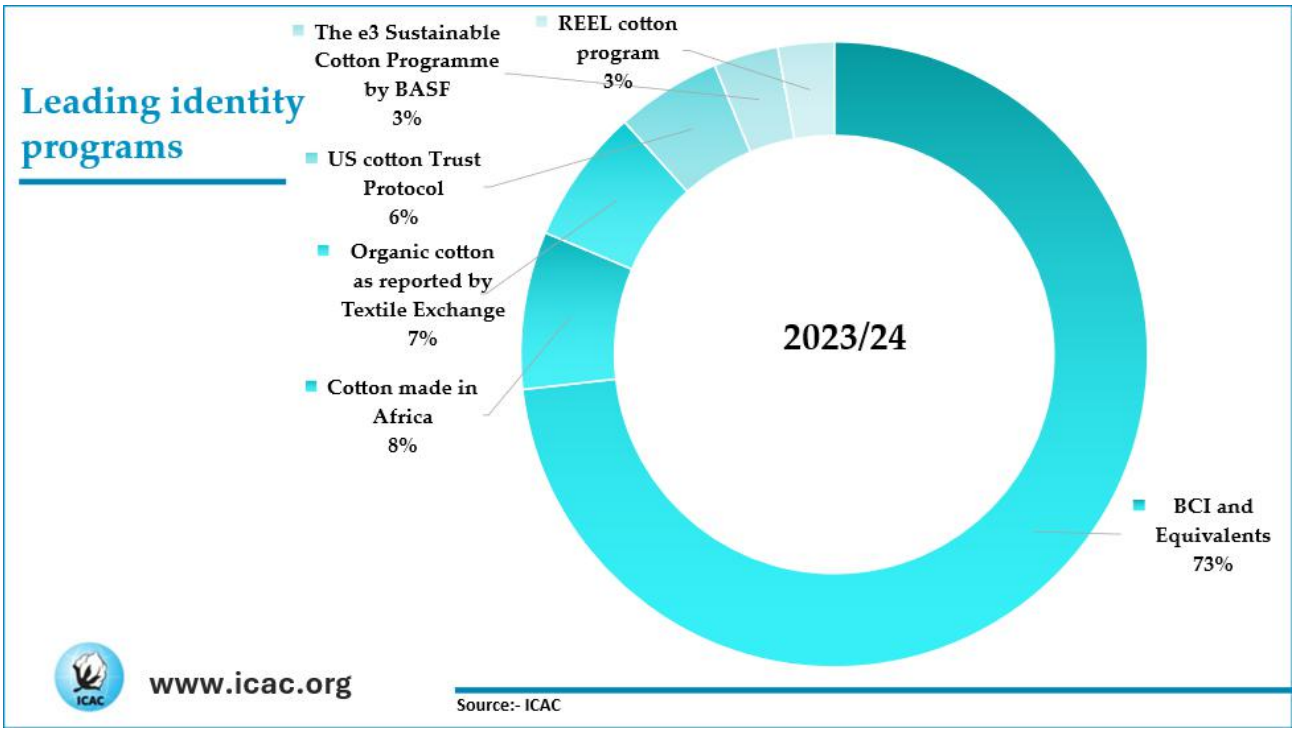
4. Cotton made in Africa production will not be sold under the BCI banner starting 2023 (will stop by the end of the 2022) as ICAC follows the August to July cotton season, Cotton made In Africa production is specified as a part of BCI cotton untill 2021/22 season. Approximate assumptions is made for reporting 2022/23 season.

5. BCI and equivalent Standards indudes ABR program in Brazil, ICPSS in Israel, myBMP in Australia, ICPSS, Agro-2.

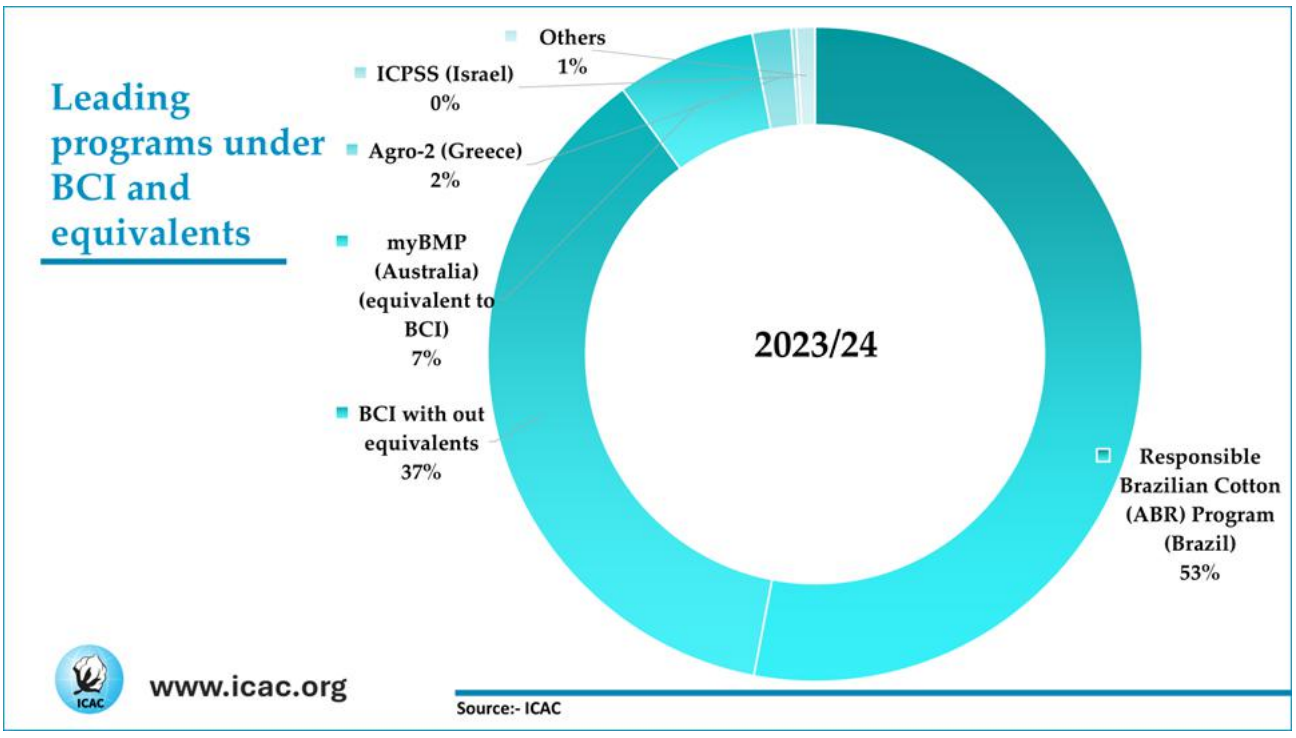
6. Note:- Better Cotton Initiative and CmiA ended their benchmarking agreement at the end of 2022 and had agreed on minimum market disruption for verified partners. For season 2023/24, CmiA produced in Benin and Cote d'Ivoire was still eligible to be counted as Better Cotton Initiative equivalent. In these two countries, CmiA partners produced 220,579 MT.

* Assumed equal to the last season.

Leading identity programs



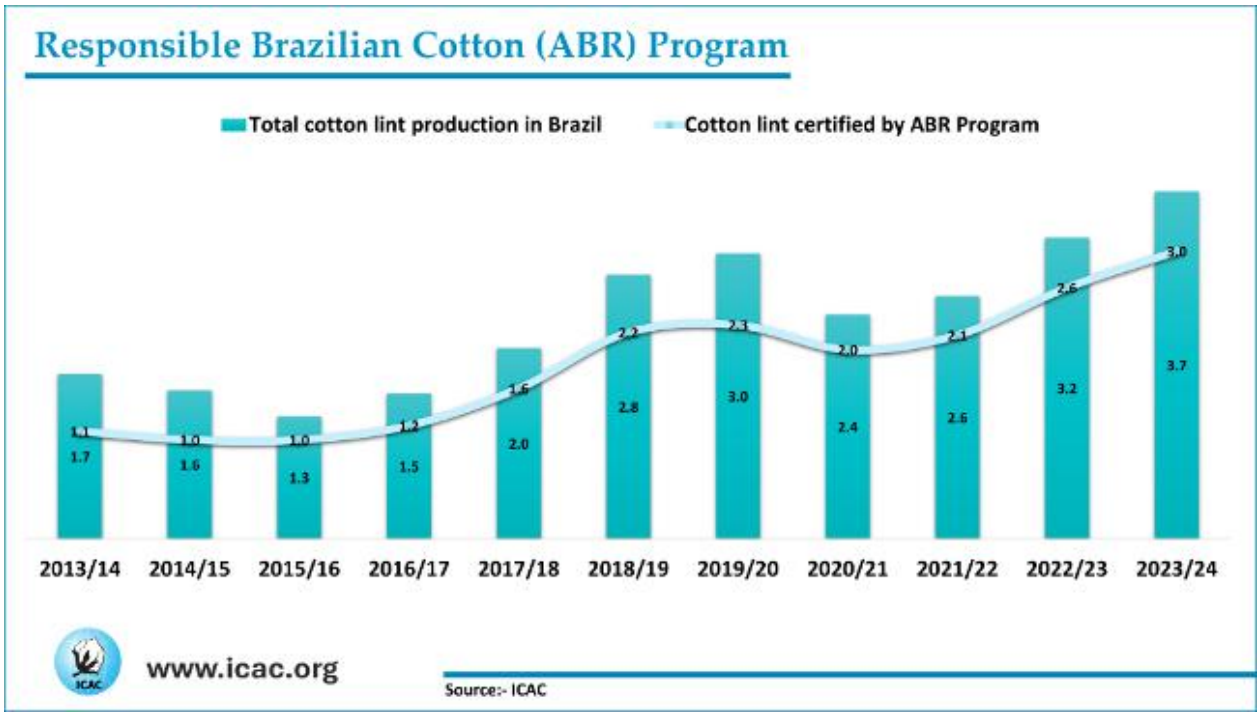
Leading programs under BCI and equivalents



RESPONSIBLE BRAZILIAN COTTON (ABR) PROGRAM

The ABR program certification is equivalent to the BCI certification. In the 2023/24 season, the ABR program alone accounted for 12% of total world cotton production. Additionally, it accounts for more than 50% of total production under BCI and its equivalents. Production under the ABR program increased by 15% in the 2023/24 season compared to the previous season.

The main reason for this increase was the rise in area under cotton, record cotton yields and subsequent production, and the elevated levels of production certified by the ABR program.



BETTER COTTON INITIATIVE AND EQUIVALENTS

BCI and equivalents represent about 23% of total world cotton production in 2023/24, an increase of 4%, to reach about 5.6 million tonnes. Many regions contributed to this increase, including Australia, Brazil, Egypt, Greece, India, Mali, Pakistan, Spain, Tajikistan, and Uzbekistan, amongst others. Better Cotton Initiative also reported a fall in some other regions including China, Israel, Kazakhstan, Madagascar, US, Türkiye, and others. Various reasons contributed to these changes:

In **Australia**, the Better Cotton Initiative equivalent (myBMP program) saw an increase in enrolments, increasing total figures from that region. Australian growers that achieve myBMP certification can voluntarily opt in to Better Cotton Initiative (there is no separate/parallel Better Cotton Initiative program in Australia).

Brazil has seen improvement in yields overall, largely due to favorable growing conditions in the 2023/24 season, which contributed to expansion in ABR program certification (Better Cotton Initiative equivalent).

Better Cotton Initiative in **China** witnessed a reduction in 2023/24 mostly because of the overall reduction in China's cotton production caused by several climatic and natural factors. There were unusual weather patterns characterized by lower-than-average heat accumulation. This led to delayed germination and maturation of cotton plants. The region also experienced significant natural disasters, particularly hailstorms, which caused substantial damage to the cotton crop.

Better Cotton Initiative also expanded its reach in **Egypt** with both new and existing program partners.

In **Israel**, Better Cotton Initiative certification witnessed a fall as the total area planted dropped in Israel mainly due to low market prices. Growers usually move away from cotton when the prices are low, as cotton cultivation has a high cost of production and is usually dependent on rented and shared machinery.

Better Cotton Initiative no longer has an operational Program Partner in **Kazakhstan**, so no licensing took place since 2022/23.

Madagascar's only producer did not earn a Better Cotton Initiative license in the 2019/20 and 2020/21 seasons, hence the figures for production are zero. The country program was discontinued thereafter.

In the 2020/21 season, Better Cotton Initiative in **Mali** saw a significant drop in production due to poor prices and internal management issues. In the 2021/22 season, a big push by the CMDT and the government of Mali boosted production, complimented with price increase, strong sensitization sessions in the field, and subsidies on the production. Better Cotton Initiative also increased the number of Producer Units (groups of farmers) from 17 to 22. In 2022/23, Mali was badly affected by a jassid infestation. In the 2023/24 season, better pest management led to resumption of production combined with an increase in the numbers of Better Cotton Initiative producer units.

Good expansion in **Pakistan** by Better Cotton Initiative was largely due to favorable seasonal weather and targeted interventions by both Better Cotton Initiative and the Government of Punjab, particularly around early sowing campaigns. These efforts helped farmers better align their crop cycle with optimal weather conditions, significantly boosting productivity.

The drop in the **United States** in 2023/24 was driven by extreme drought conditions in Texas, where a high percentage of Better Cotton Initiative producers are located, which consequently impacted the amount of cotton harvested that season.

The Better Cotton Initiative program in **Spain** was launched in 2023, when Better Cotton Initiative forged strategic partnerships with Espalgodón and the Regional Government of Andalucía to kickstart the production of Better Cotton Initiative equivalent cotton in Spain. The first harvest of Spanish Better Cotton Initiative was produced in 2024. Spain has its own standard, Sistema de Producción Integrada (SPI), which is recognized as being equivalent to the Better Cotton Initiative standard. All BCI cotton from Spain comes from SPI. However, not all SPI is BCI cotton.

Better Cotton Initiative reported a fall in **Türkiye** due to excessive rainfall in the Aegean region that damaged cotton fields. Other issued faced were rotting of young cotton roots, and in some areas, the cotton seeds did not germinate. The southeastern region suffered from white fly infestation. All Better Cotton Initiative partners faced unseasonably high temperatures in the later months. These factors led to a significant reduction in yields.

BETTER COTTON INITIATIVE						
Lint Production (tonnes)						
Country	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Australia	91,784	31,413	142,004	382,262	381,401	407,659
Brazil	2,027,000	2,334,000	1,970,073	2,005,966	2,644,026	3003086
China	908,000	769,598	92,430	99,307	99,355	85,403
Egypt			736	2,412	2,755	7,955
Greece			22,741	54,256	92,991	112,995
India	647,493	1,022,163	829,507	862,189	917,126	919,688
Israel	9,341	8,730	5,708	5,166	17,303	14,217
Kazakhstan	2,132	2,905	3,527	4,059		
Madagascar	673	-				
Mali	65,050	23,408	8,441	174,726	109,293	166,259
Mozambique	9,858	6,350	9,898	6,617	7,186	6,950
Pakistan	906,328	943,518	681,939	817,839	305,620	461,918
South Africa	18,001	11,473	10,002	7,907	1,617	
Spain						7,785
Tajikistan	12,410	12,634	13,539	13,446	14,783	20,284
Turkey	52,957	102,517	67,174	67,381	104,885	98,868
USA	307,711	240,192	216,997	305,440	311,478	304,785
Uzbekistan					10,743	19,618
CmiA	576,000	578,000	619,716	632,257	420,039	
Total	5,634,738	6,086,901	4,694,432	5,441,230	5,440,601	5,637,470

Note:- Better Cotton Initiative and CmiA ended their benchmarking agreement at the end of 2022 and had agreed on minimum market disruption for verified partners. For season 2023/24, CmiA produced in Benin and Cote d'Ivoire was still eligible to be counted as Better Cotton Initiative equivalent. In these two countries, CmiA partners produced 220,579 MT.

Source: - as collected from BCI

MY BEST MANAGEMENT PRACTICES PROGRAM (myBMP) (Australia)

The myBMP program is a voluntary farm and environmental management system that provides self-assessment mechanisms, practical tools, and auditing processes to ensure that Australian cotton is produced according to best practices. Production under myBMP increased by 7% to reach approx. 408,000 tonnes in the 2023/24 season due to increased enrollments and is expected to increase further in 2024/25.

myBMP Program						
Lint Production (tonnes)						
Country	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
As certified by myBMP	91,784	31,413	142,004	382,262	381401	407,659
Source:- data compiled by ICAC based on data collected from myBMP						

COTTON made in AFRICA (CmiA)

Cotton lint production under CmiA represented about 3% of total world cotton production. In the 2022/23 season, production increased by 24% to reach 631,000 tonnes. Major increases were reported from Benin, Cameroon, Cote d'Ivoire, Togo, and Tanzania, amongst others. Main reasons contributed to this increase:

·In **Benin**, an increase in production was possible because of better pest management, especially of jassids. In addition, there were also expansions in organic projects for a number of farmers and new partners joined CmiA. Control over jassid pest infestation and expansions in enrollments also increased production figures from Cote d'Ivoire, Tanzania and Togo.

·A fall in **Burkina Faso** figures was due to an overall production decline in the country due to security problems after farmers abandoned their fields and relocated to other parts of the country. A fall in Zambia was due to low prices and heavy climate change impacts, which made farmers switch over to alternate crops like soya.

CmiA, an initiative of the Aid by Trade Foundation (AbTF), is one of the world's leading standards for sustainably produced cotton. The goal is to help people help themselves, via trade rather than donations, in order to improve the living and working conditions of smallholder farmers in Africa and to protect our environment. AbTF works with a wide-ranging network in 10 cotton growing countries south of the Sahara, numerous partners throughout the textile value chain around the globe, as well as both governmental and non-governmental organizations, to ensure the implementation of the standard and the proper processing of certified raw materials throughout the world.

The work is built on the three pillars of sustainability, which form the core of the CmiA standard:

People: CmiA supports smallholder farmers, working to promote gender equality, dignified labor conditions, and respect for the rights of children.

Planet: CmiA is committed to protecting soil, water, biodiversity, the climate, and the environment, including by banning the use of genetically modified organisms and reducing the negative effects of crop protection.

Prosperity: CmiA facilitates access to high-quality equipment and is actively helping improve productivity, fiber quality, and overall living conditions.

COTTON made in AFRICA (CmiA)						
Metric tonnes						
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Benin	14388	12407	14780	55411	27873	71844
Burkina Faso	184191	173893	196300	200781	159172	155125
Cameroon	132990	138585	146157	136000	128155	160689
Chad		48821	50533	58482	41289	45039
Côte d'Ivoire	194474	213212	237400	225033	99969	148735
Ethiopia	11978					
Ghana	792					
Mozambique	12046	5437	12088	3650	3648	3862
Nigeria	1351	13211	1598	735	581	0
Tanzania	15246	3397	8290	6162	9789	13186
Togo				22008	19491	29007
Uganda	1333	3200	1950		4870	0
Zambia	24279	17626	8383	8135	13308	3081
Total	593068	629789	677479	716397	508145	630568
Source:- approximate calcualtions based of data collected from CmiA						

REEL COTTON PROGRAM

Cotton lint production under the REEL program represented about 1% of total world cotton production, 2% higher than the last season to reach 224,000 tonnes. Major increases are from India, Pakistan and new expansion into Türkiye. REEL Cotton Program is a flagship three-year agricultural training program by CottonConnect to support sustainable cotton production. CottonConnect has been working to improve the sustainability of cotton production for over ten years with global brands and cotton farming communities to deliver positive results with huge environmental and social benefits. The training educates farmers on sustainable cotton farming practices.

REEL COTTON PROGRAM						
Lint Production (tonnes)						
Country	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Bangladesh		443	999	2861	4490	3011
India	16086	79040	105349	79043	184135	187152
Pakistan	43152	52801	52891	43601	19012	24152
China	1748	7783	27350	29944	11735	1531
Egypt					71	231
Turkey						7456
TOTAL	**60986**	**140067**	**186589**	**155449**	**219443**	**223533**

Source:- data compiled by ICAC based on data collected from REEL cotton Program

US COTTON TRUST PROTOCOL

Cotton lint production in the 2023/24 season under the Cotton Trust Protocol (USCTP) was 24% higher at 420,000 tonnes, a significant increase in enrollment due to the ability to offer some incentives through a USDA Climate Smart grant. The increased enrollment was enough to counter the impacts of a second year of drought in the Southwest region of the USA. For 2024/25, production under USCTP is estimated at 545,000 tonnes. The total production under USCTP currently amounts to about 2% of total world cotton production.

The Cotton Trust Protocol is the voluntary sustainability program for US cotton growers and the traceability platform for all US cotton. Its mission is to bring quantifiable and verifiable goals and measurements to US cotton production's key sustainability metrics of land use, soil loss, water reduction, soil carbon, greenhouse gas emissions, and energy use.

US COTTON TRUST PROTOCOL							
Lint Production (tonnes)							
Country	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
USA		104669	240133	367,389	338,188	420,132	545,310
Source:- data compiled by ICAC based on data collected from UCTP							

REGENERATIVE ORGANIC ALLIANCE (ROA)

The ROA program reported an increase in the 2023/24 season for its growing identity program. At the present time, the ROA program encompasses 19.4 million acres and 568 crops in 45 countries, representing 66,500 primarily small-scale farmers for 297 brands. ROA cotton production is focused on India and Peru, with additional countries under consideration.

The Regenerative Organic Alliance (ROA)						
Lint Production (tonnes)						
Country	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
USA				1,975	4,041	6,456

Source:- data compiled by ICAC based on data collected from ROA