



# 83RD ICAC PLENARY MEETING

**“Uniting the Cotton and Textiles Value Chain  
for a Sustainable Future”**



Bremen, Germany  
March 23-24, 2026

# WORLD COTTON MARKET OUTLOOK

---

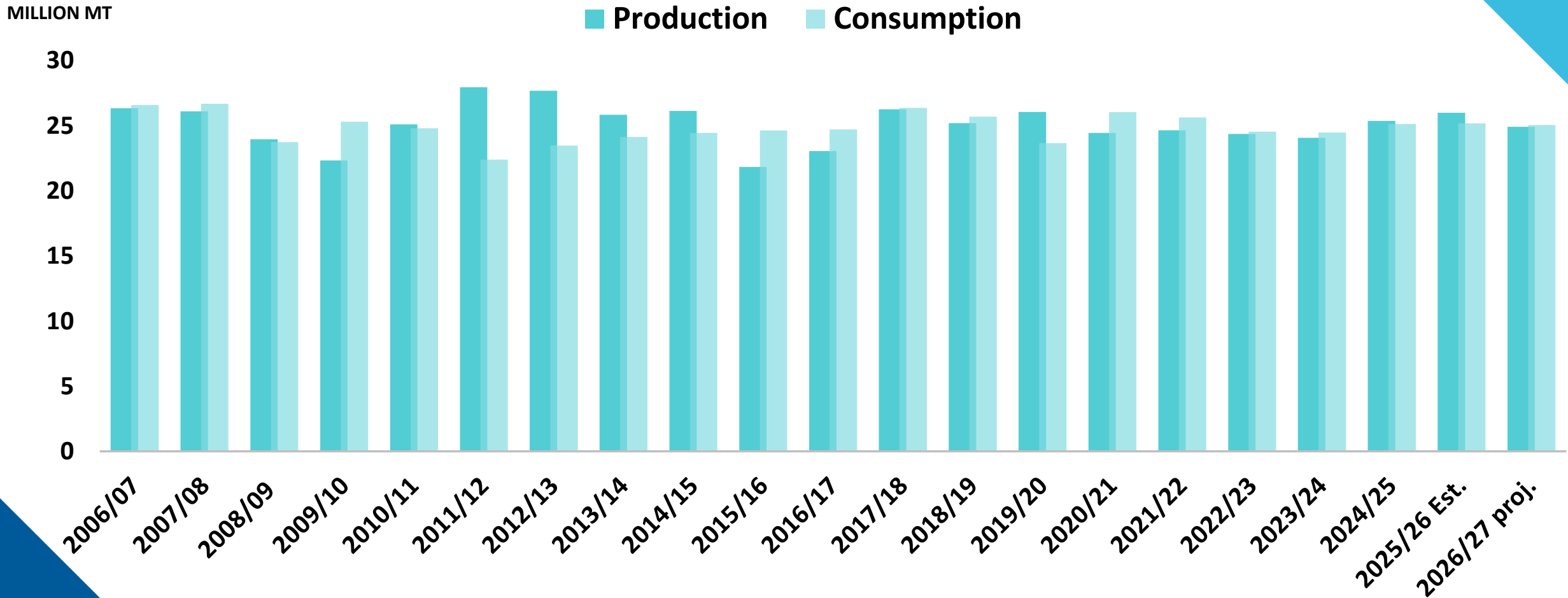
**Parkhi Vats**  
**Economic Affair Officer**

E: [Parkhi@icac.org](mailto:Parkhi@icac.org)

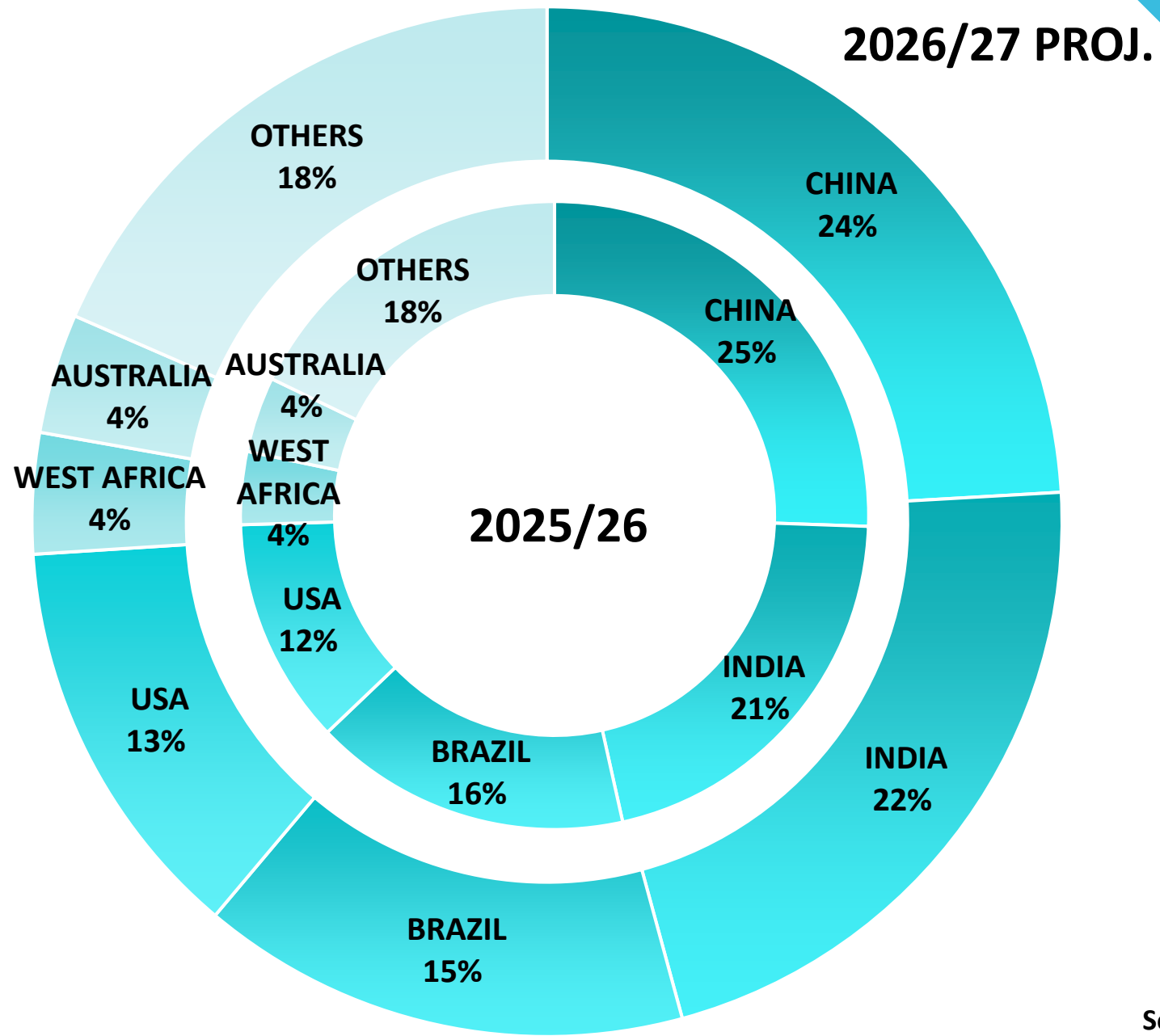
W: [www.icac.org](http://www.icac.org)



# Early Projections of World Production and Consumption

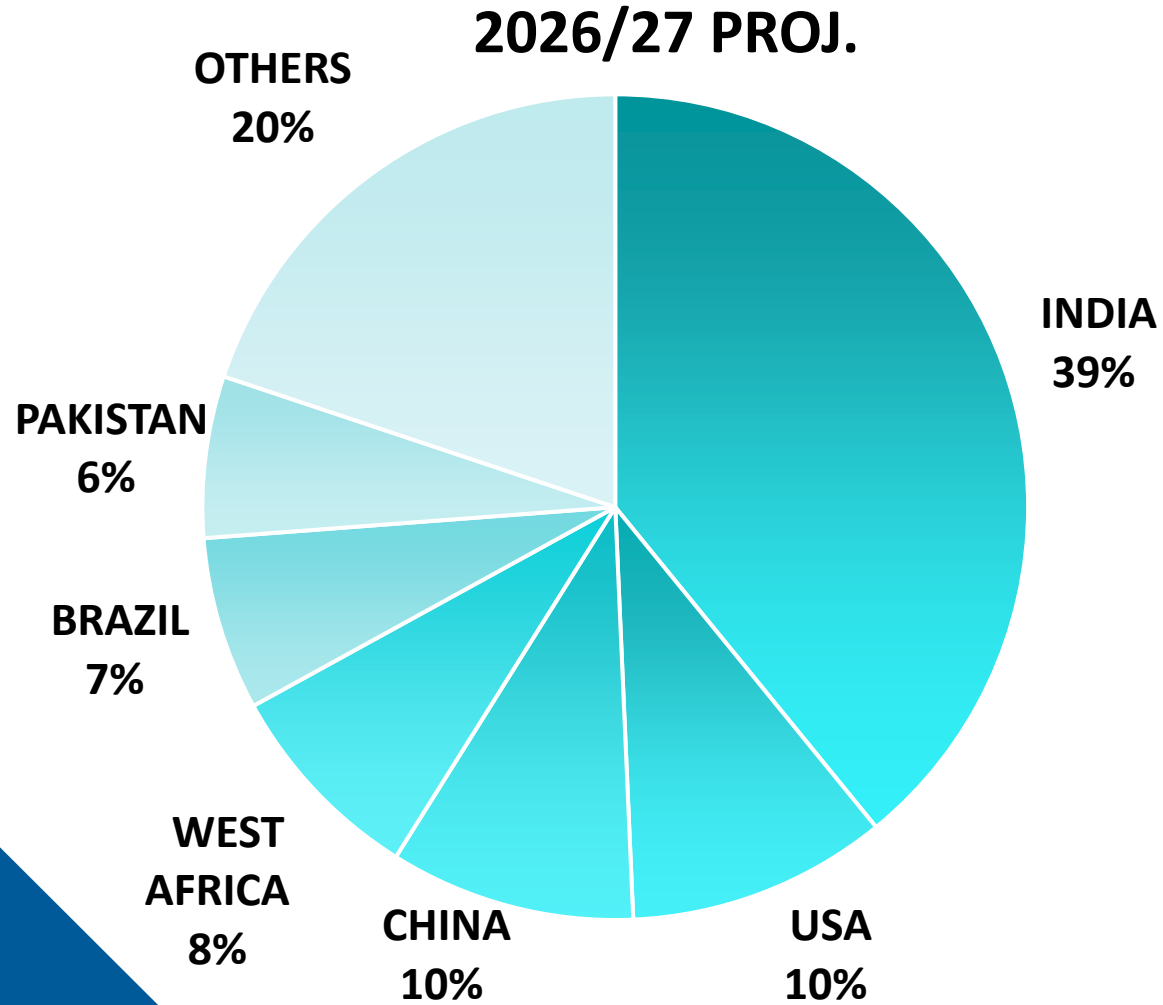


# Leading Producers



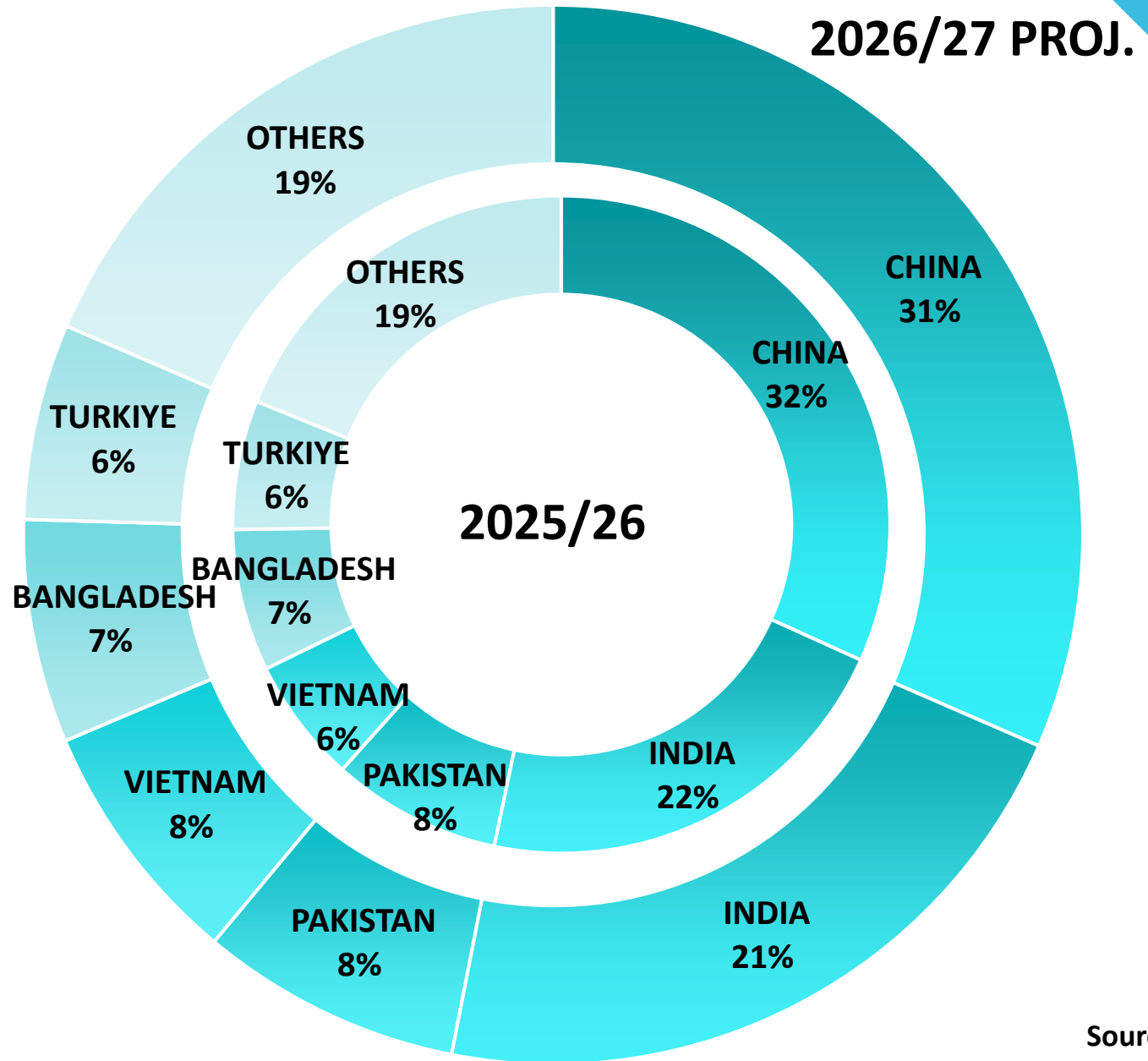


# Leading Countries by Area



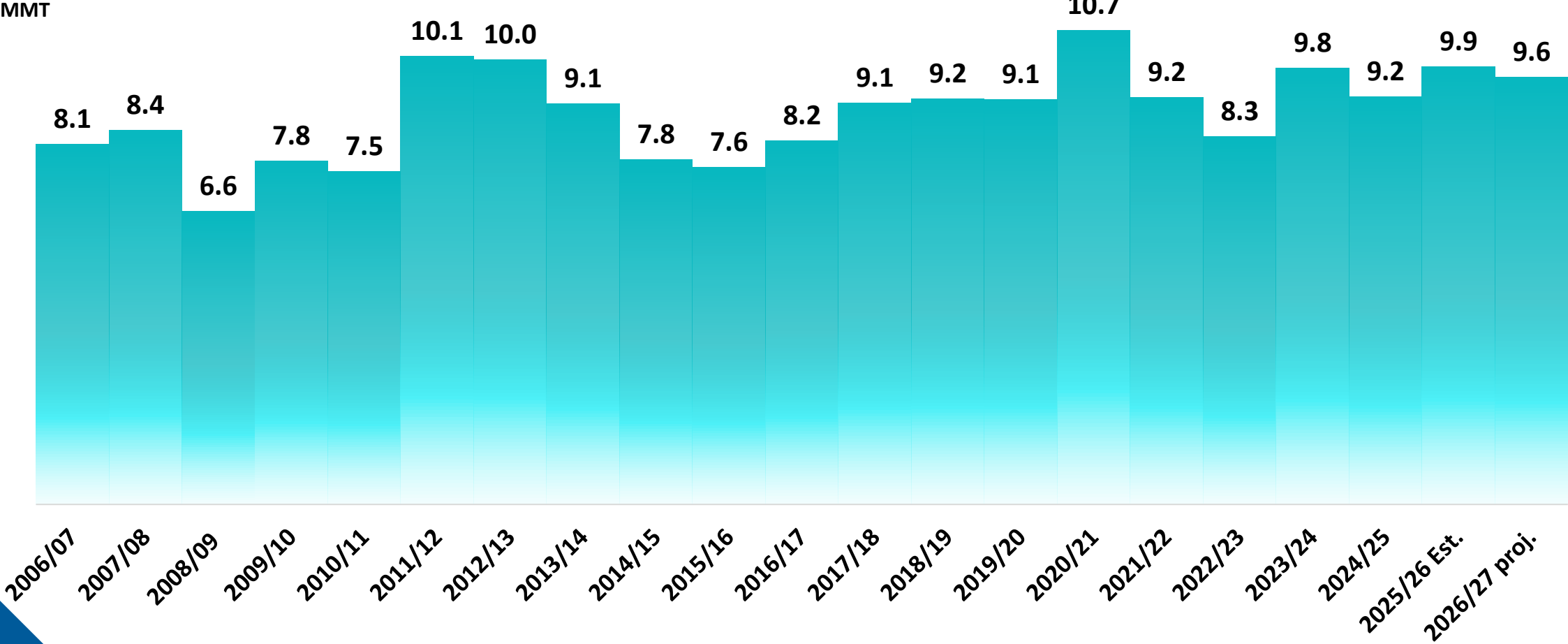
LEADING COUNTRIES BY AREA AND THEIR RESPECTIVE YIELD AND PRODUCTION IN 2026/27 PROJ.			
	Area 000 HA	Yield KG/HA	Production 000 MT
WORLD TOTAL	30170	826	24908
INDIA	11800	458	5400
USA	3075	1041	3200
CHINA	2900	2229	6000
WEST AFRICA	2441	186	944
BRAZIL	2050	1868	3830
PAKISTAN	1910	471	900

# Leading Consumers

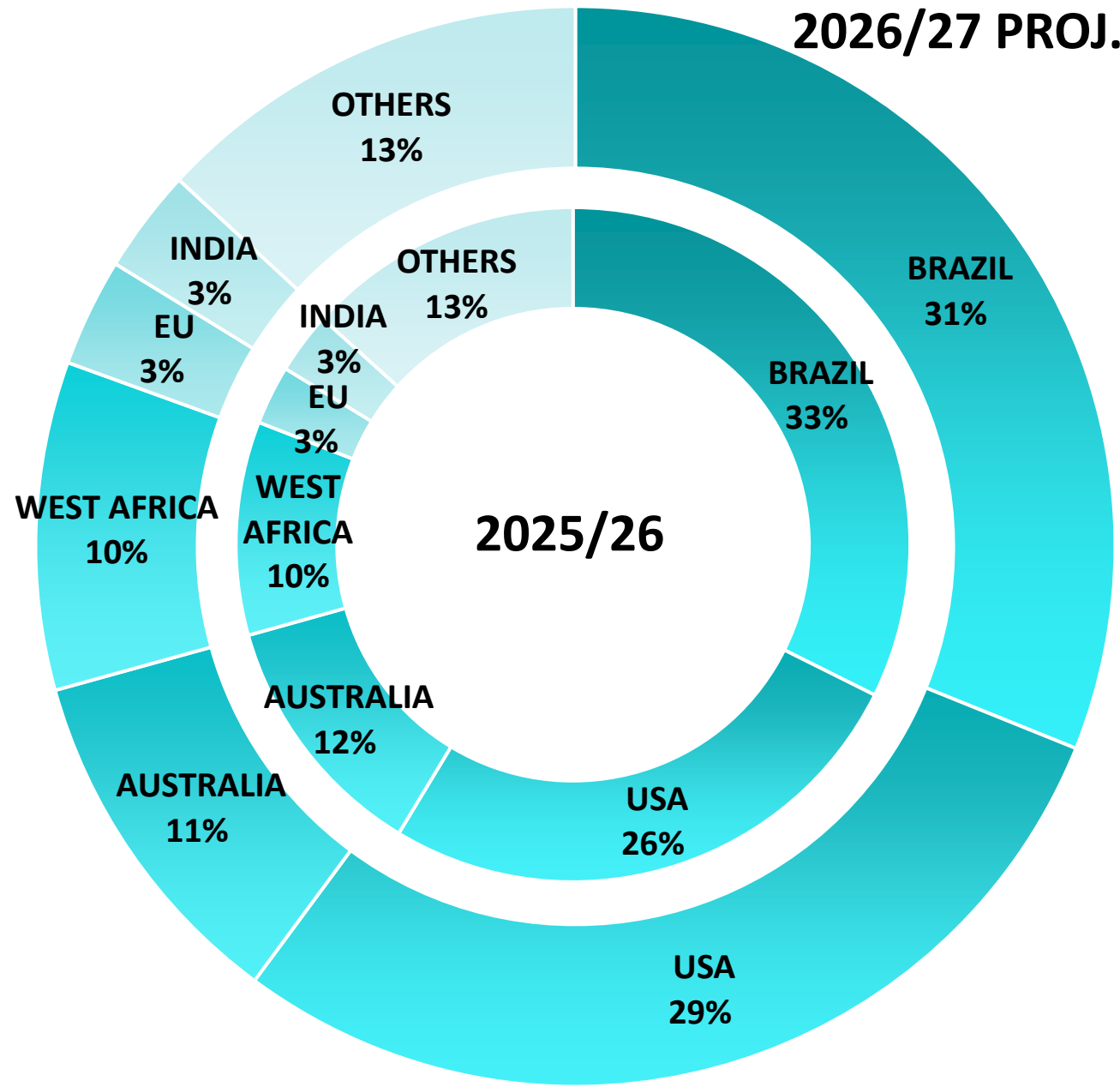


Source:- Parkhi Vats, ICAC

# Early Projections For Cotton Trade in 2026/27 season



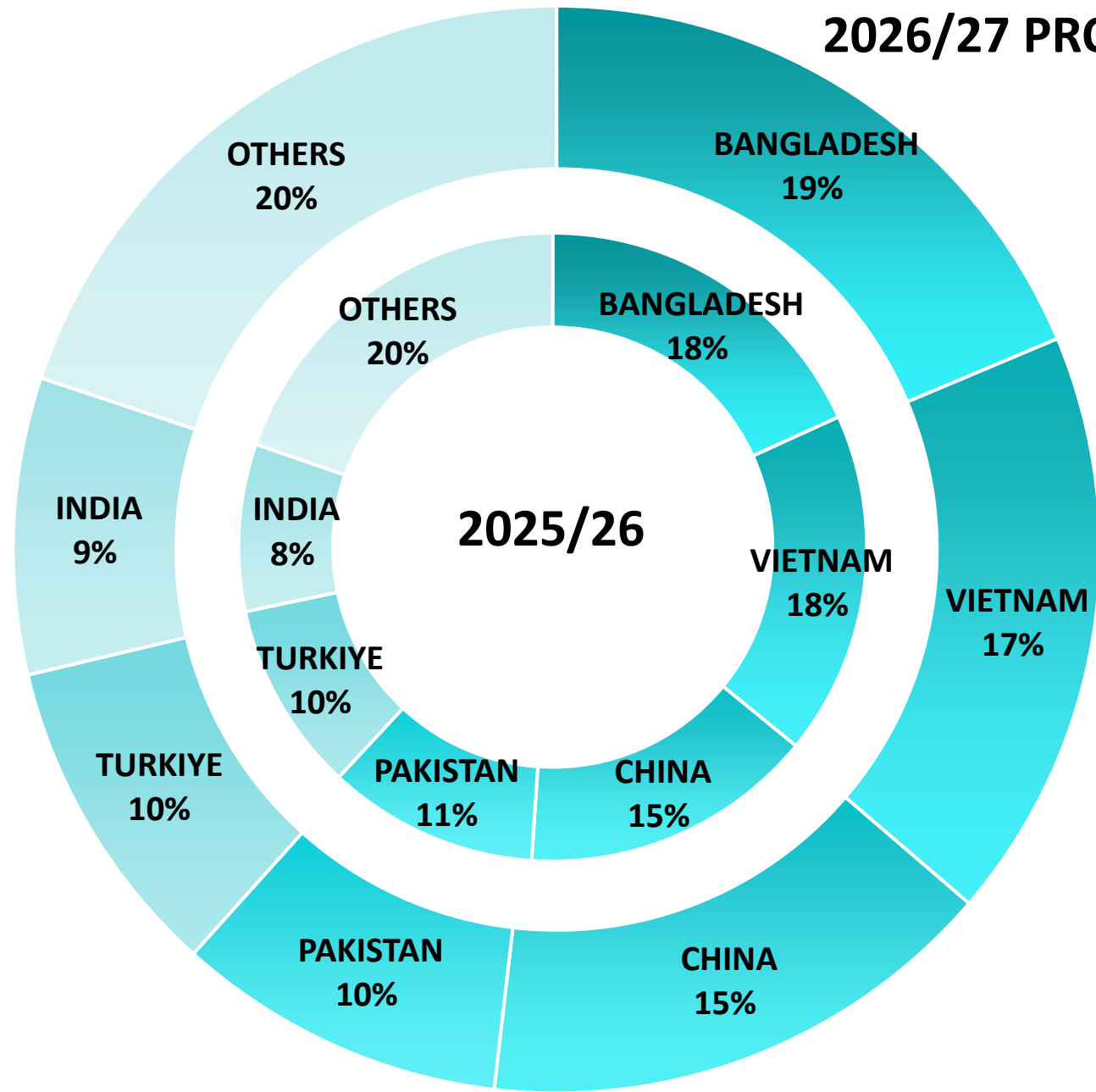
# Leading Exporters



# Leading Importers



2026/27 PROJ.



Source:- Parkhi Vats, ICAC

# Recent Trade Deals and Tariff Negotiations affecting Cotton Trade



On 22<sup>nd</sup> February 2026, The United States imposed a blanket tariff of 15% on all countries the US trades with



On 9<sup>th</sup> Feb 2026 US and Bangladesh signed a trade agreement



On 2<sup>nd</sup> February 2026, US had reduced tariffs on India to 18% including tariffs on cotton-based textiles

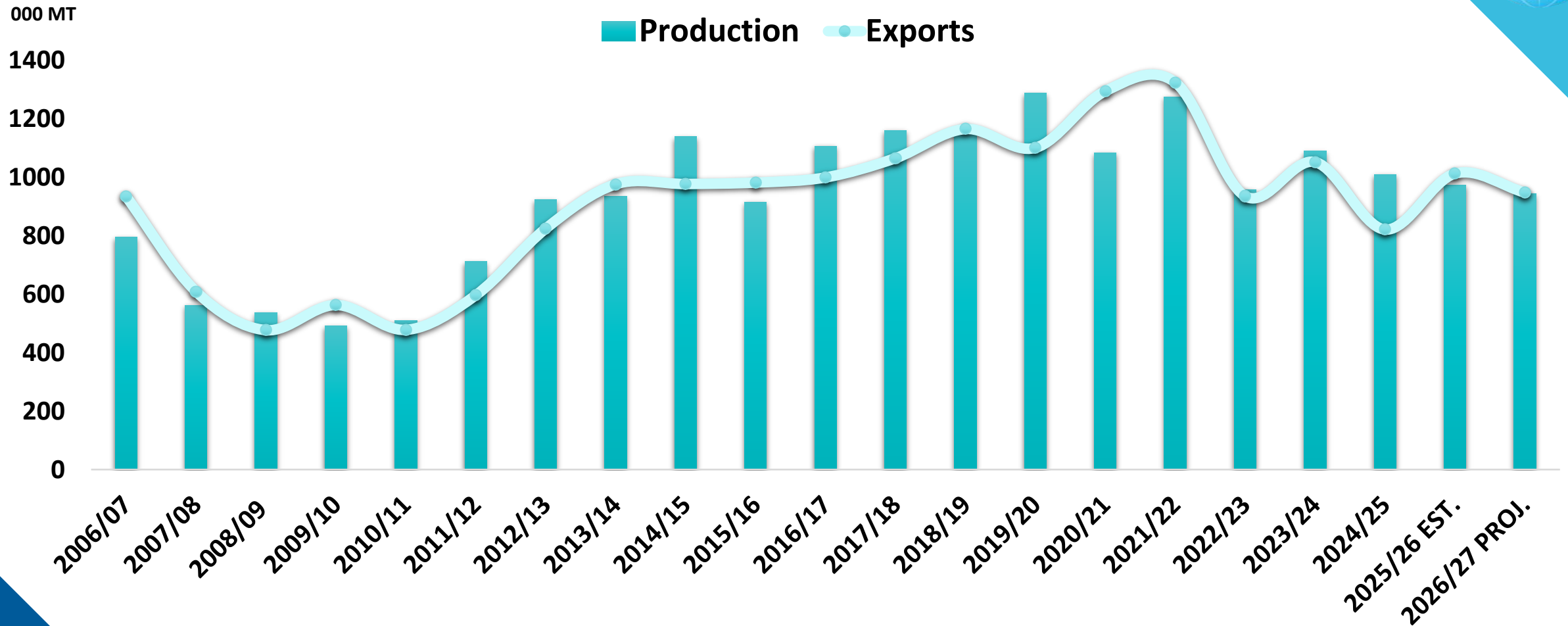


On 27<sup>th</sup> January 2026, India and European Union's trade agreement was announced

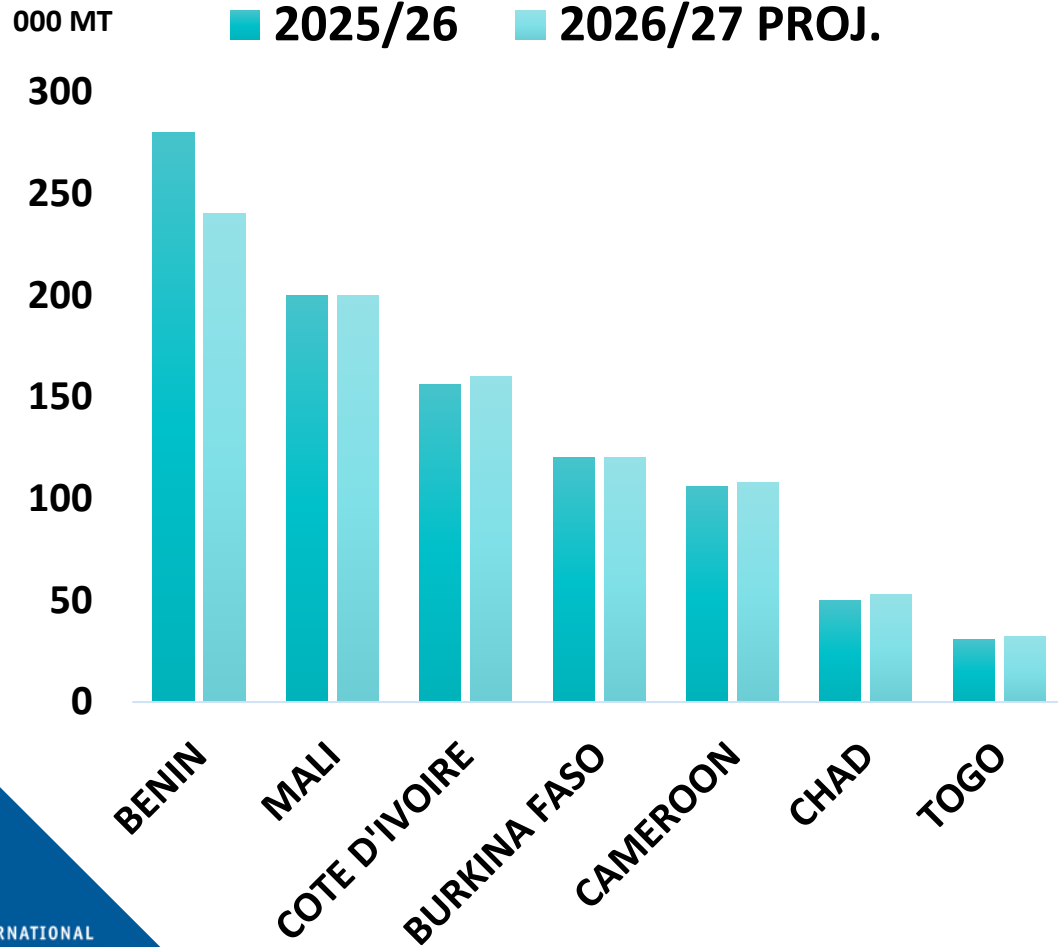


U.S. and Vietnam reached a trade agreement in September 2026

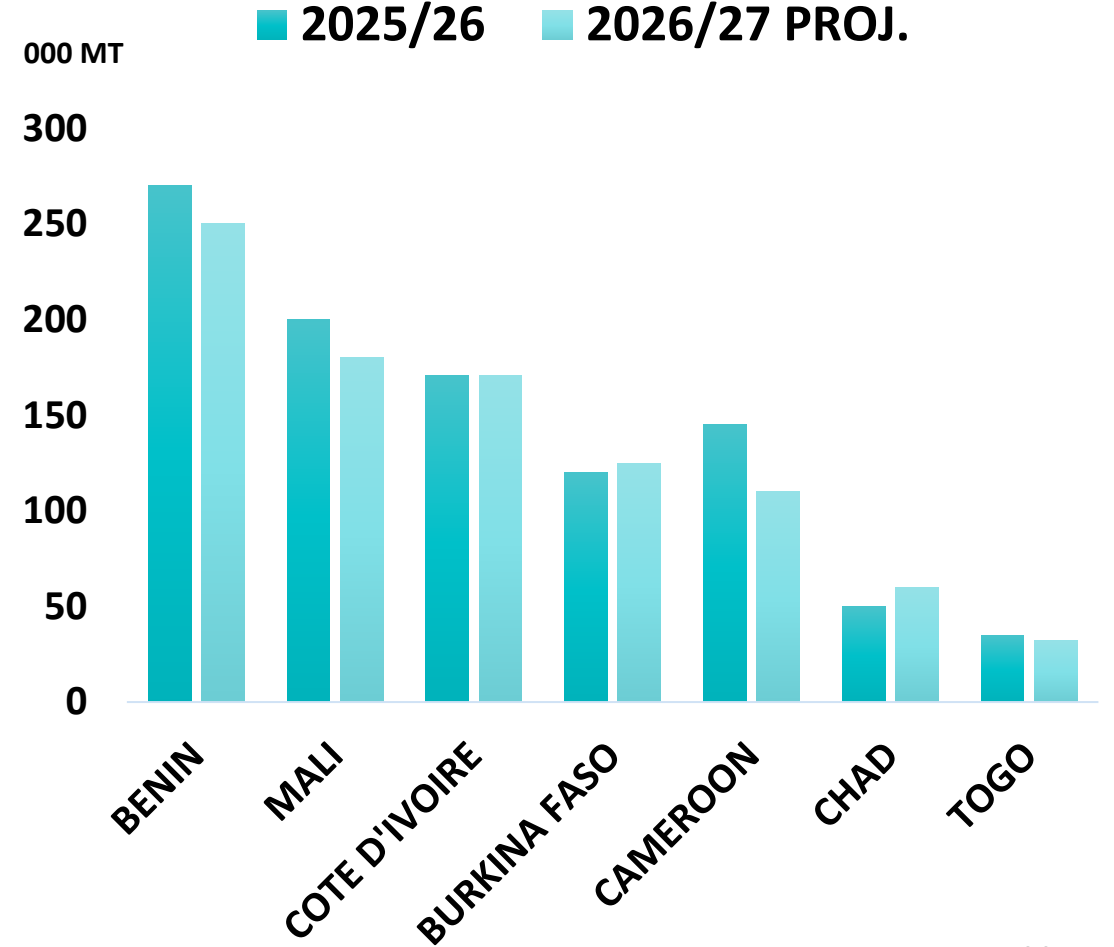
# West African Production and Export Trend



## LEADING PRODUCERS



## LEADING EXPORTERS

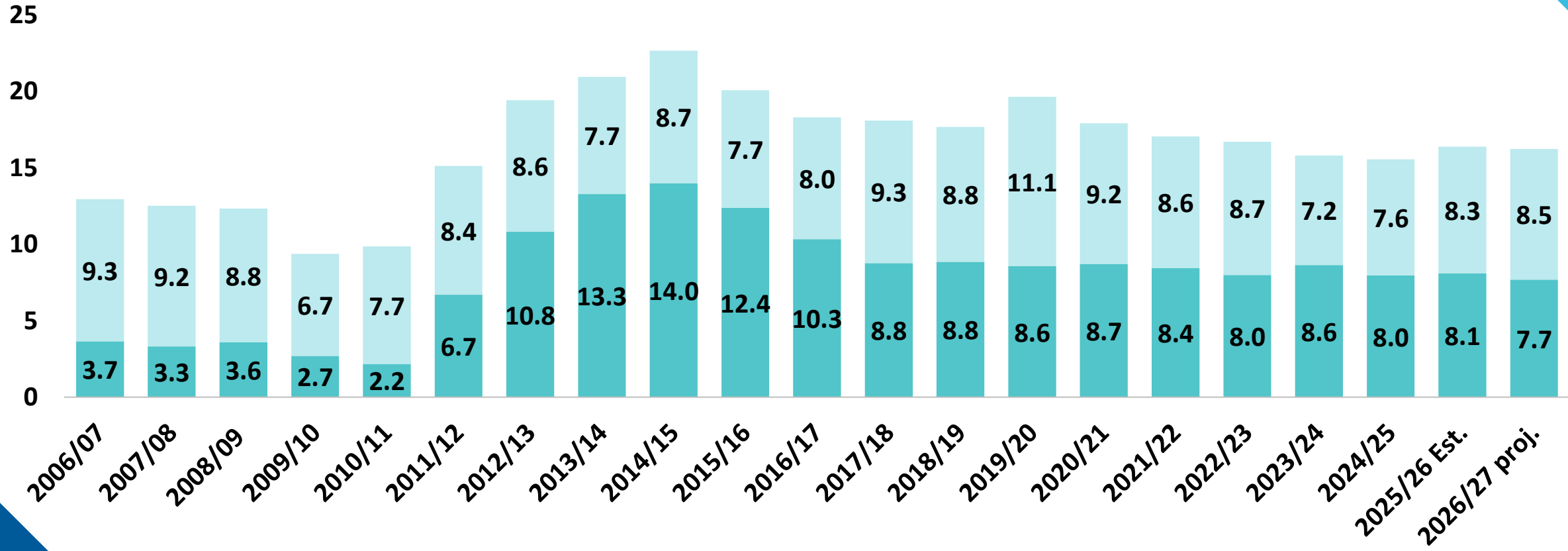


# World Cotton Lint Stocks



MILLION MT

■ STOCKS IN CHINA    ■ STOCKS OUT OF CHINA



# Specialty Cotton Production

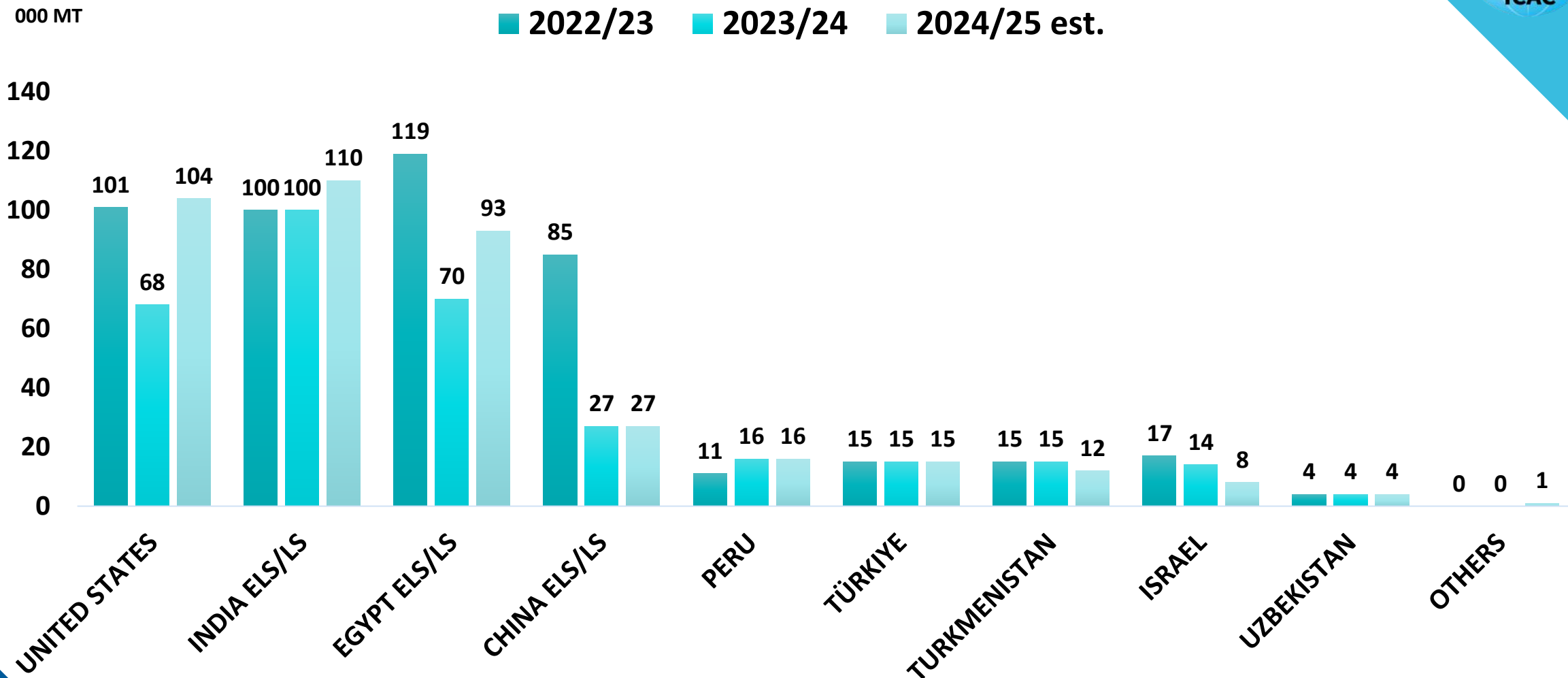


SPECIALTY COTTON PRODUCTION					
000 MT					
	2019/20	2020/21	2021/22	2022/23	2023/24
Total world cotton production	26052	24550	25054	24774	24170
Total Specialty Cotton production		6313	7261	7379	8065
Total ELS and LS cotton production		391	326	467	329
Total cotton production under Identity programs	6858	5922	6935	6912	7736

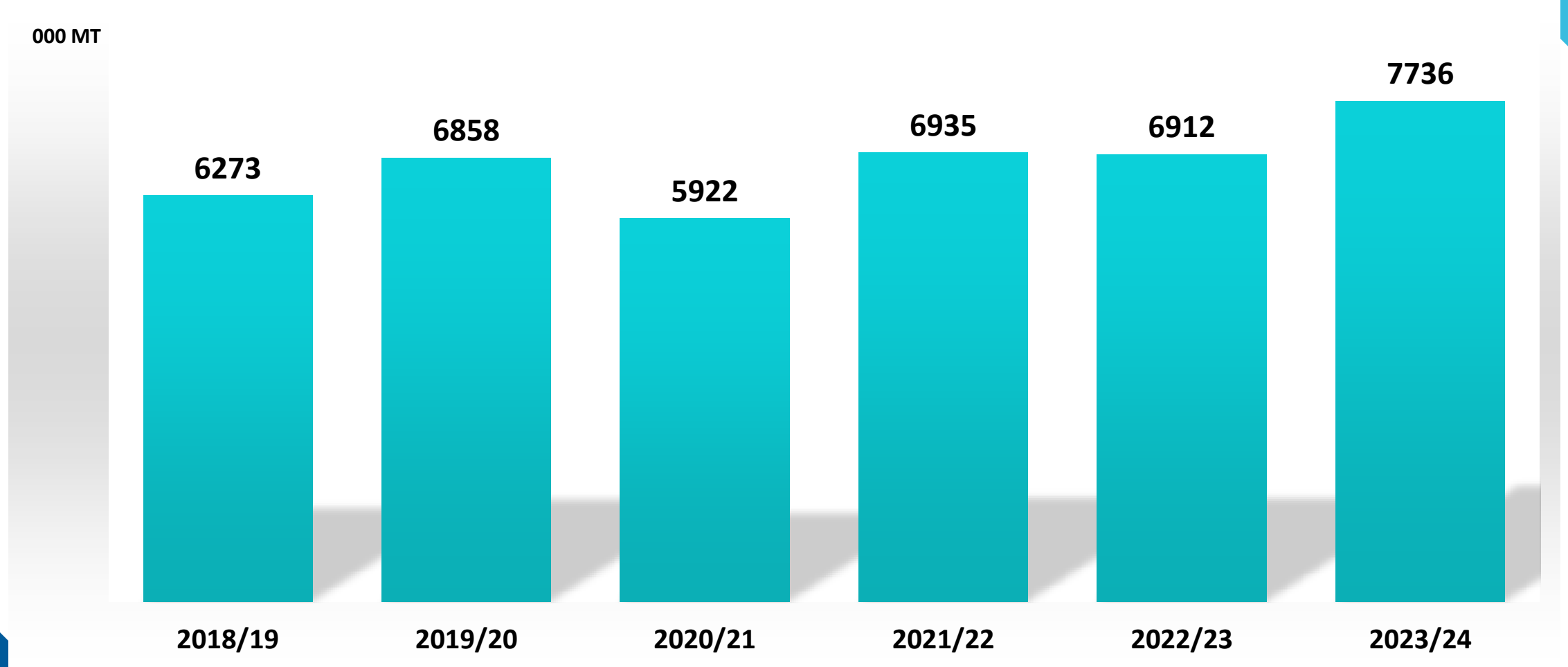
SPECIALTY COTTON PRODUCTION					
Percentage of total world production					
	2019/20	2020/21	2021/22	2022/23	2023/24
Total world cotton production		100	100	100	100
Total Specialty Cotton production		26	29	30	33
Total ELS and LS cotton production		2	1	2	1
Total cotton production under Identity programs		24	28	28	32



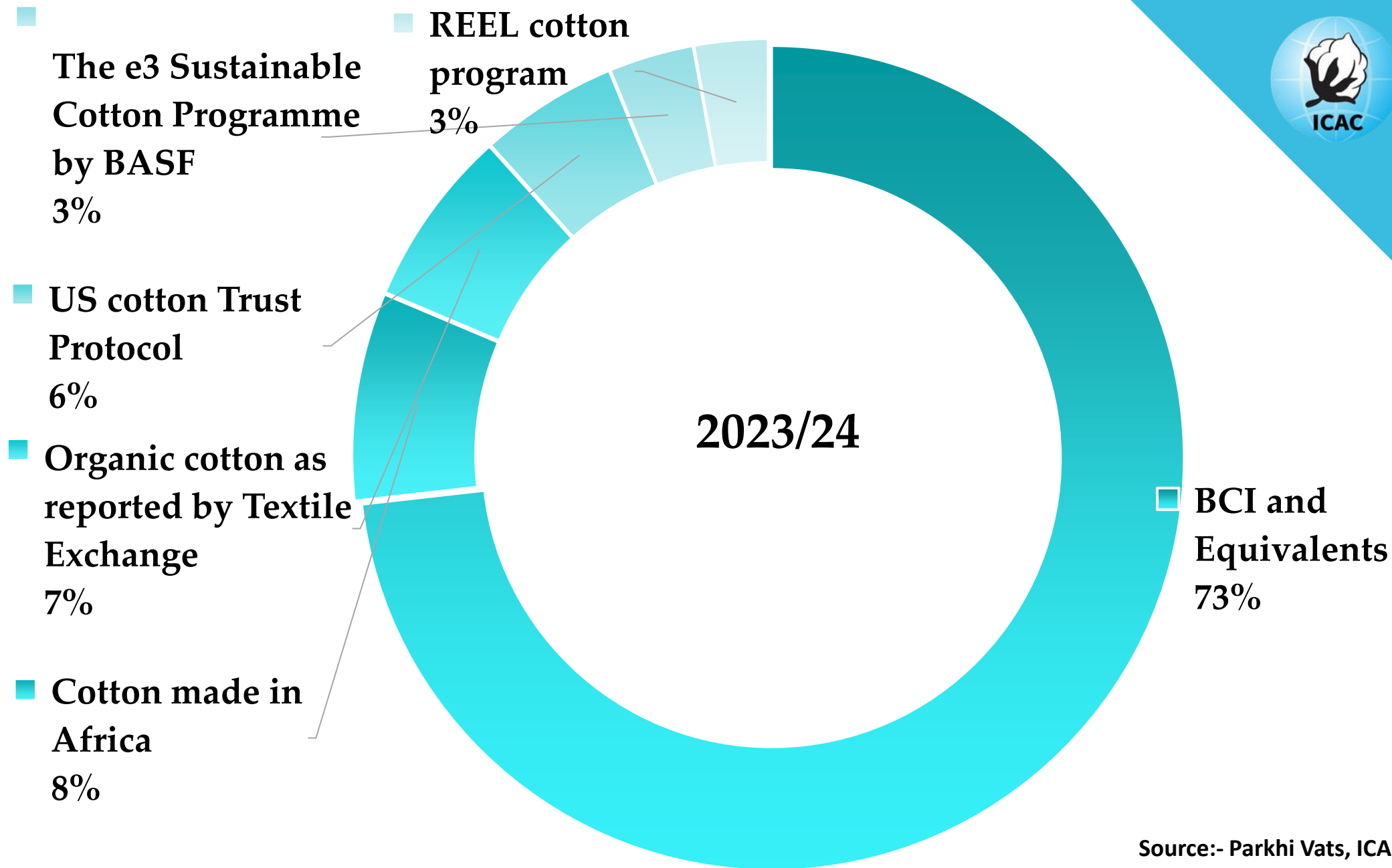
# Leading Producers of ELS and LS cotton



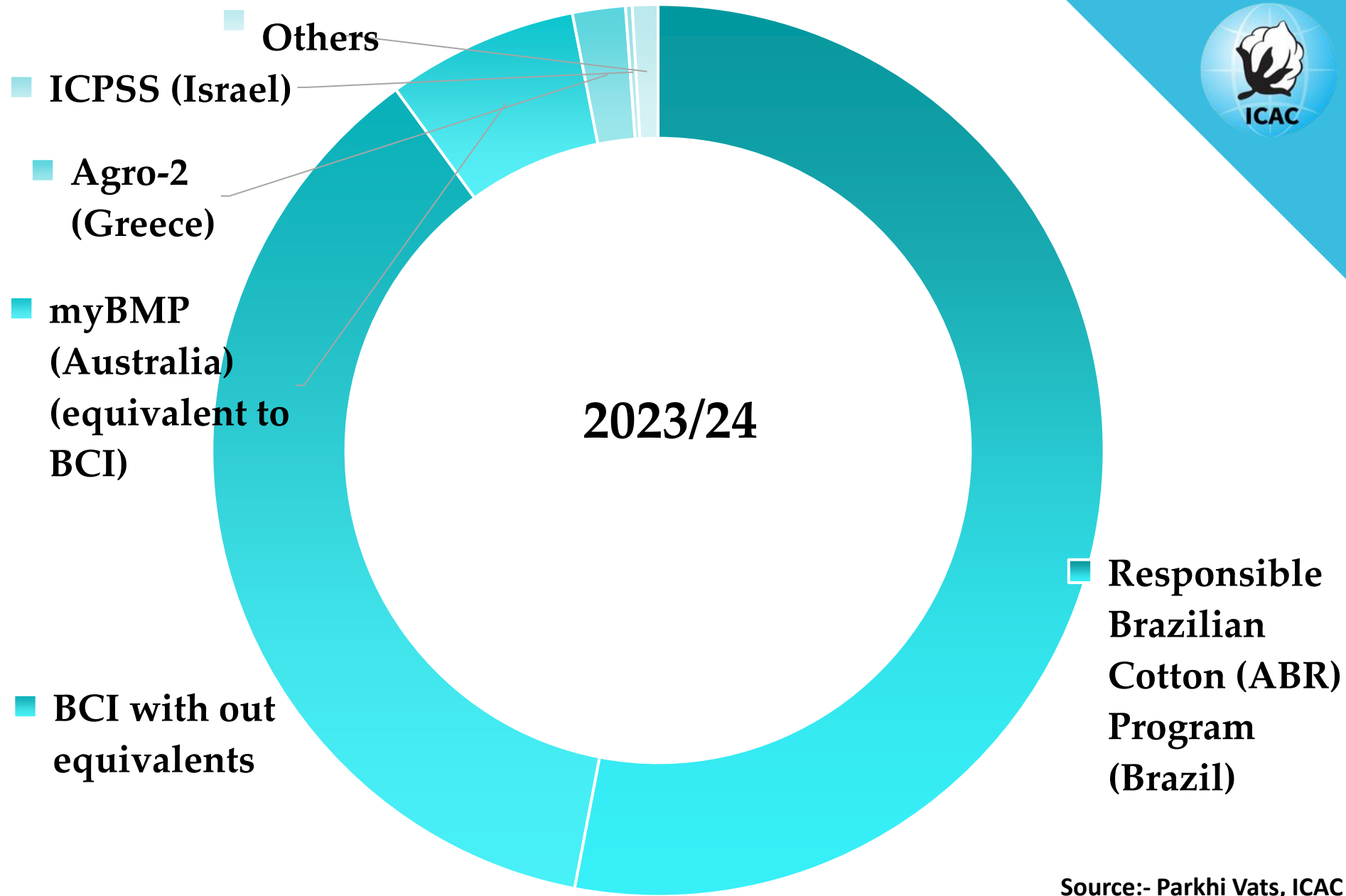
# Total Production Under Identity Programs



# Leading Identity Programs



# Leading Programs under BCI and Equivalents



# THANK YOU



LinkedIn

STAY CONNECTED



[www.icac.org](http://www.icac.org)

