

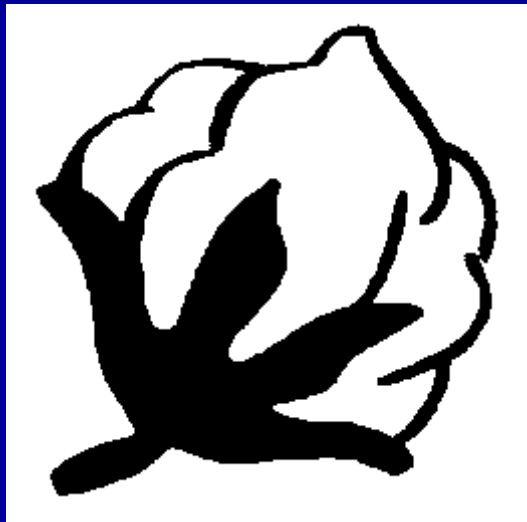
# Cotton : Employment and Value Chain Linkages

**DGs Consultative  
Framework  
Mechanism on  
Cotton**

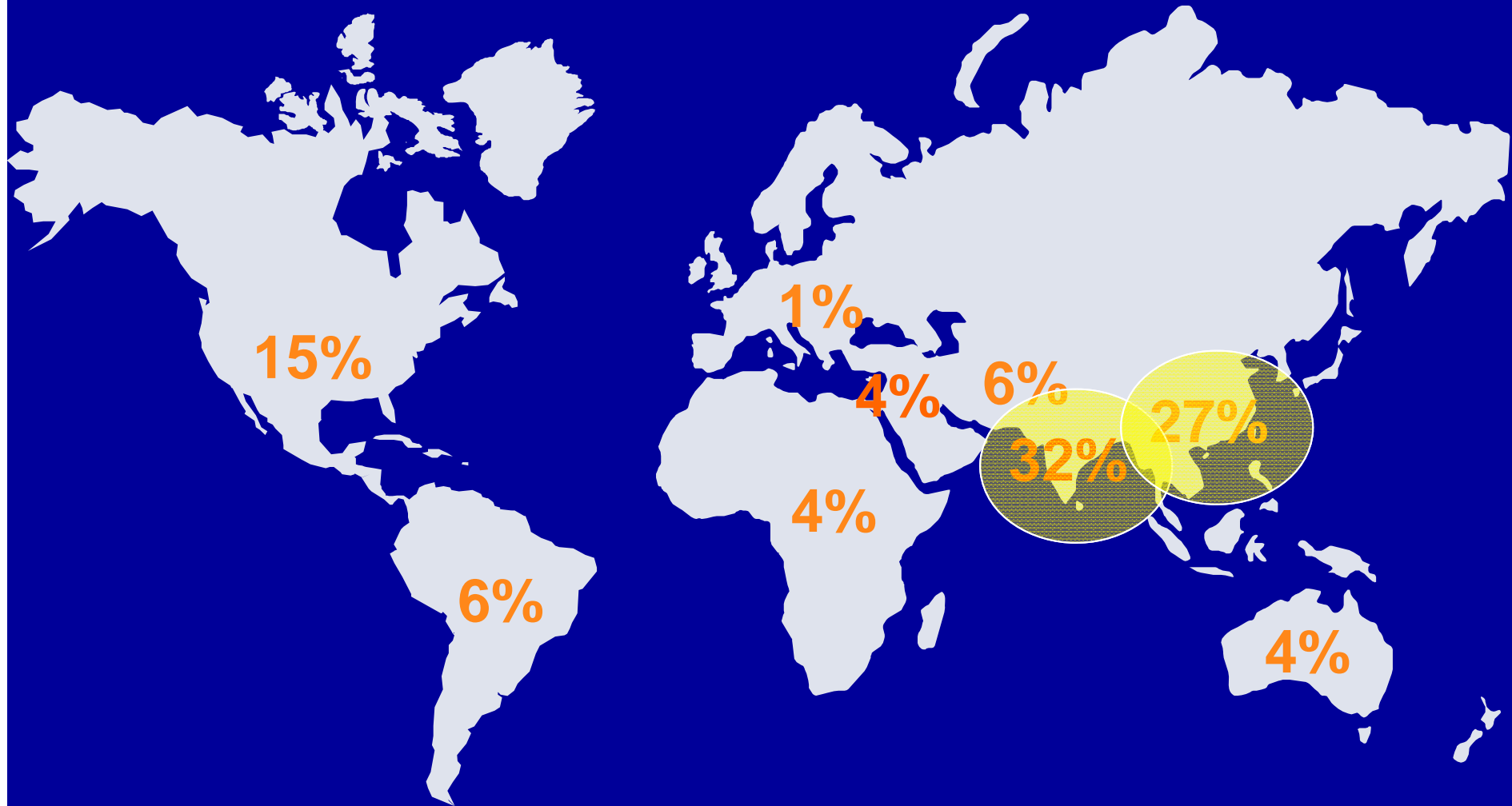
**Geneva**

**30 October 2013**

**Terry Townsend  
ICAC**



# World Cotton Production 2012/13

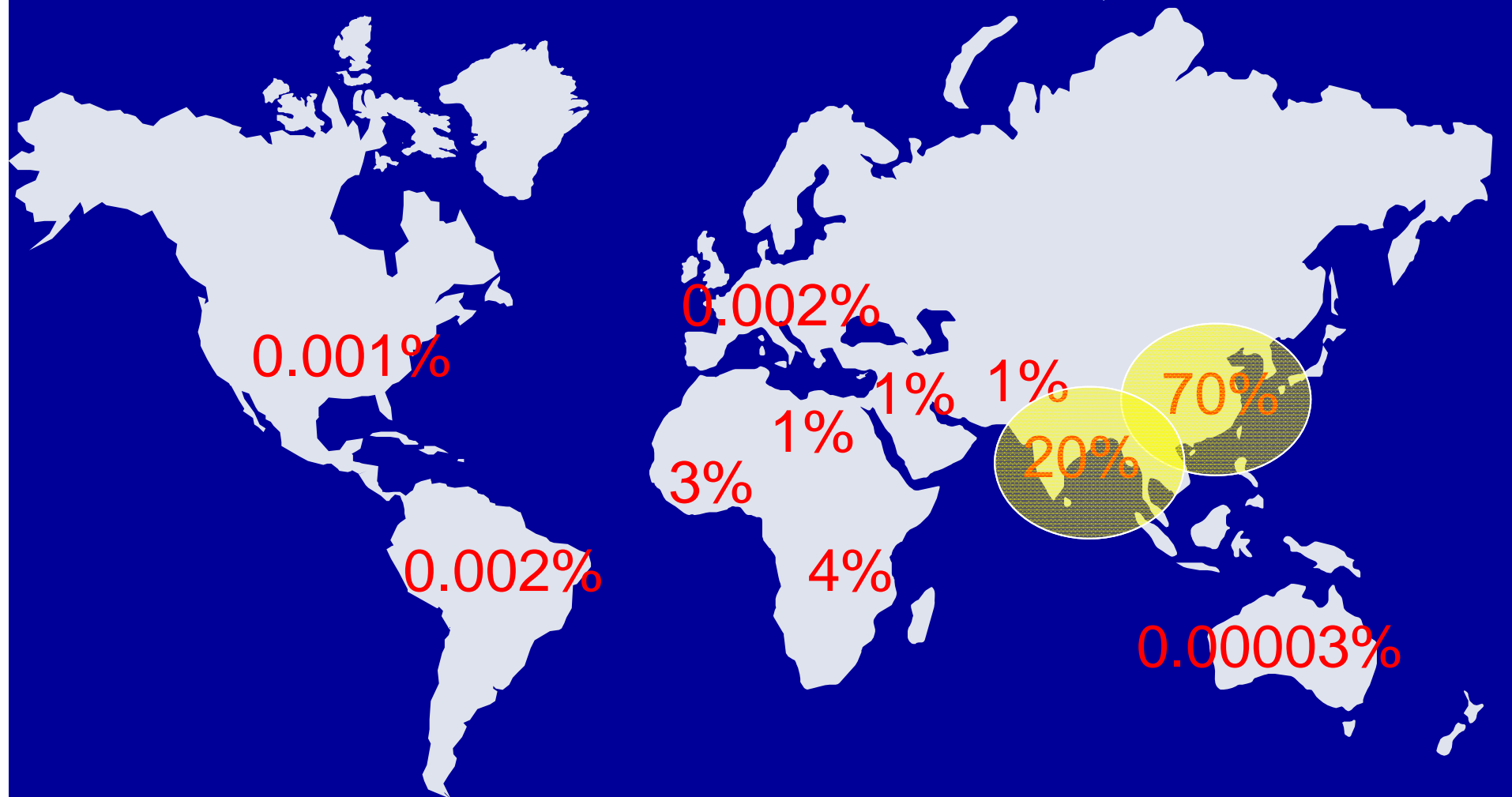


# World Cotton Farms, 000s

**43 Million**



# World Cotton Farms, %



# World Cotton Employment

## Definitions Matter:

Households vs Farms vs People

Current or Former

Family Labor vs Paid Employment

Occasional Labor vs Livelihood

250 Million “Involved” in cotton  
production and ginning each year.

# World Cotton Employment

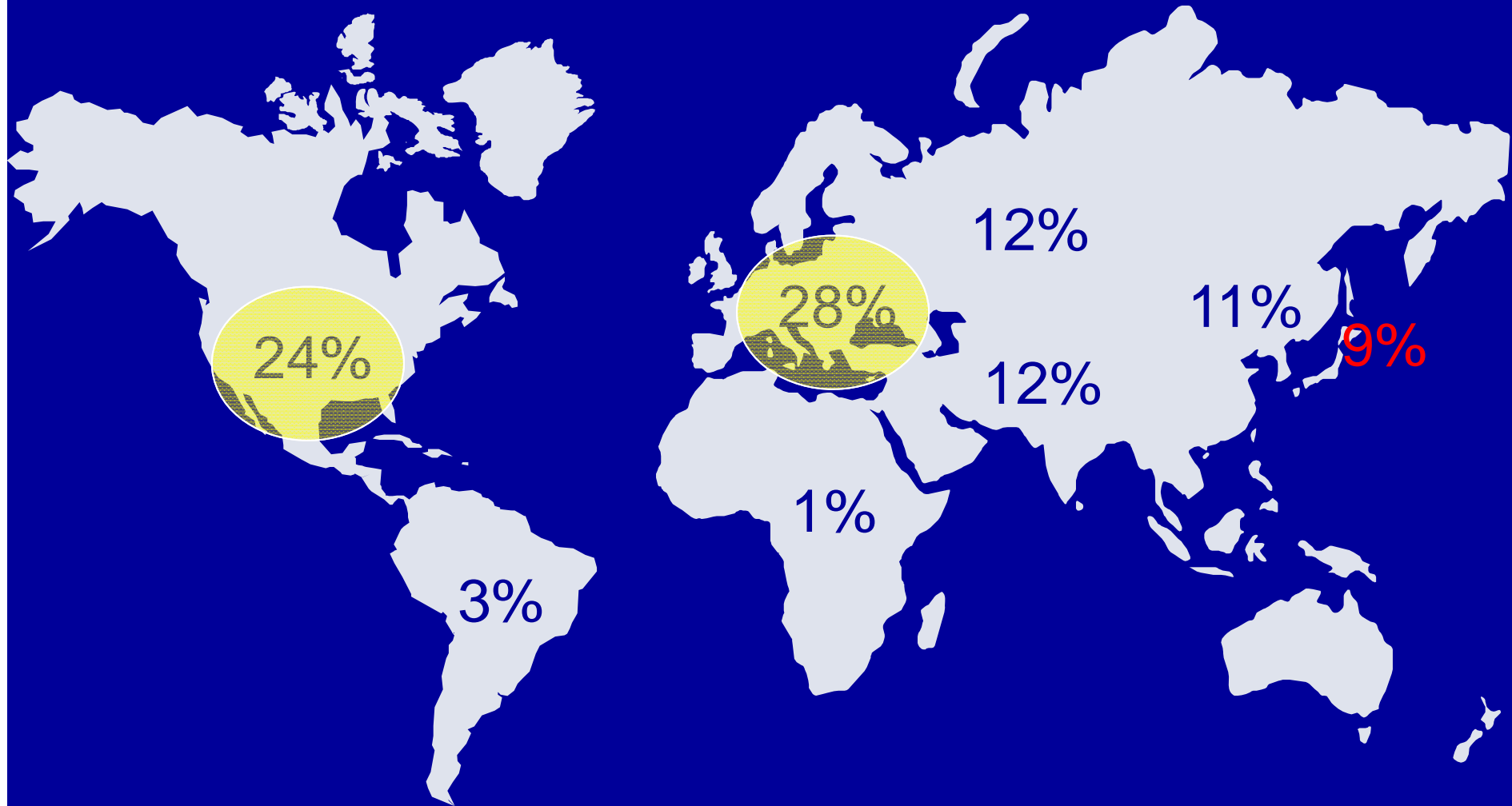
Segment	Number	Employees
<b>Gins</b>	<b>9,000</b>	<b>400,000</b>
<b>Prs./Whs.*</b>	<b>3,000</b>	<b>30,000</b>
<b>Merchants</b>	<b>10,000</b>	<b>30,000</b>
<b>Spinners</b>	<b>6,000</b>	<b>3,000,000</b>
<b>Weavers</b>	<b>3,000</b>	<b>700,000</b>
<b>Knitters</b>	<b>7,000</b>	<b>1,700,000</b>
		<b>6,000,000</b>

\*Pressing factories and warehouses

# World Cotton Value Chain, 2012

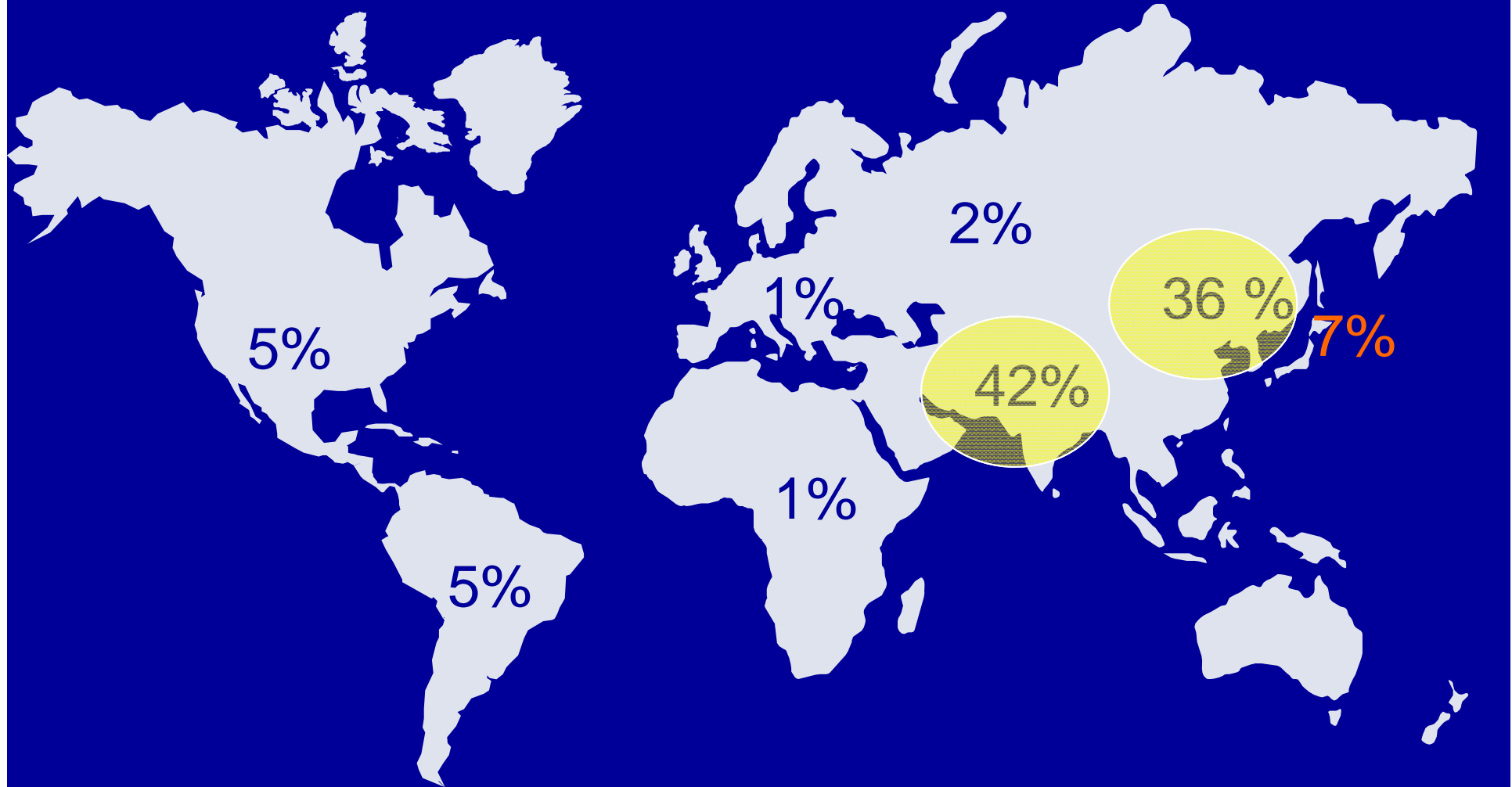
	Increment \$/Lb.	Cummulative \$/Lb.	
Farms	0.63	0.63	2%
Gins/Warehouse/Press	0.12	0.75	0%
Merchants/ins/freight/finance	0.13	0.88	0%
Spinners	1.16	2.04	3%
Fabric	2.49	4.54	7%
Dye & Finishing			
Cut & Sew			
Retailer's cost, woven shirt	3.22	7.76	9%
Consumer pays	28.10	35.86	78%

# World Cotton Mill Use 1938/39

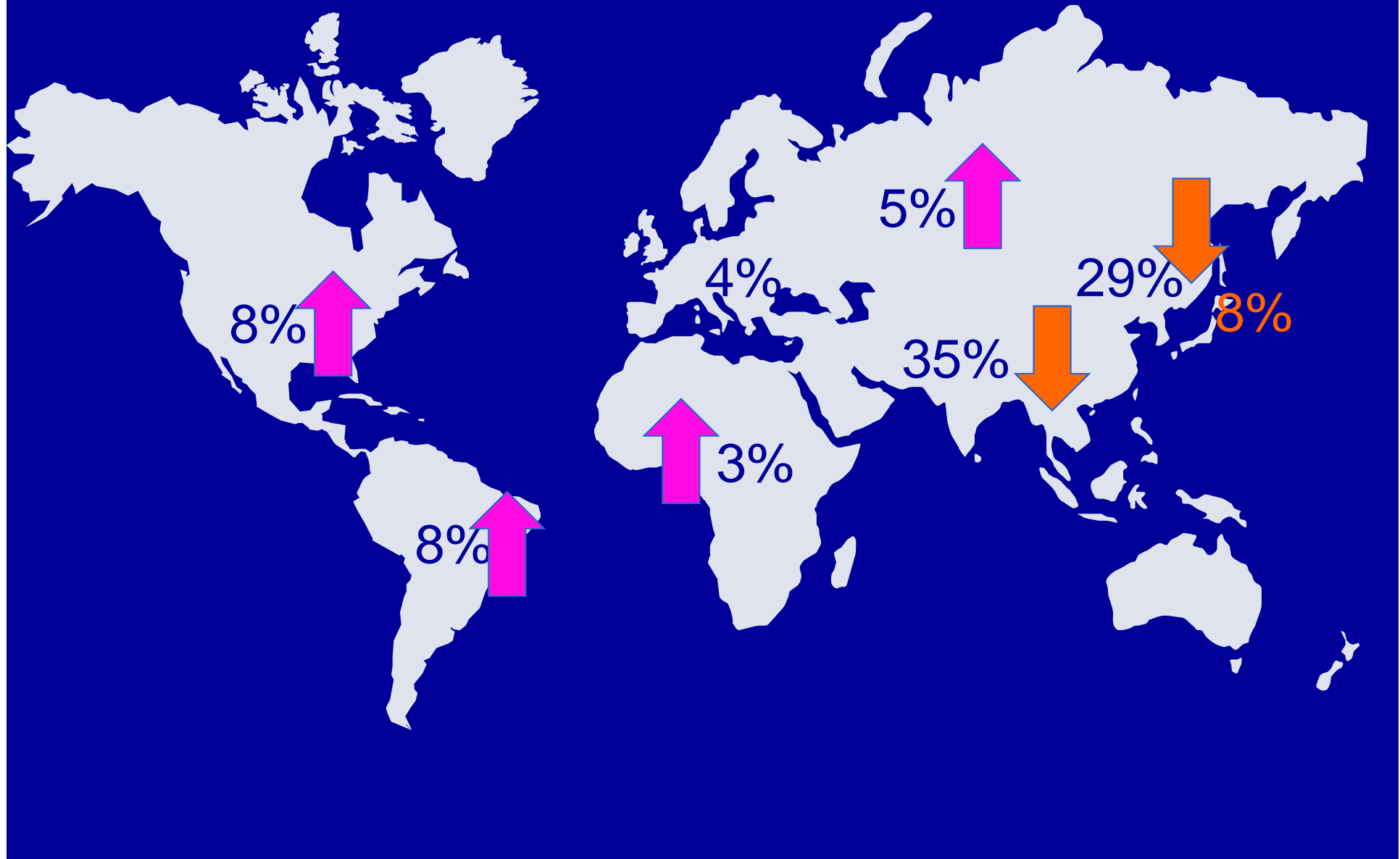




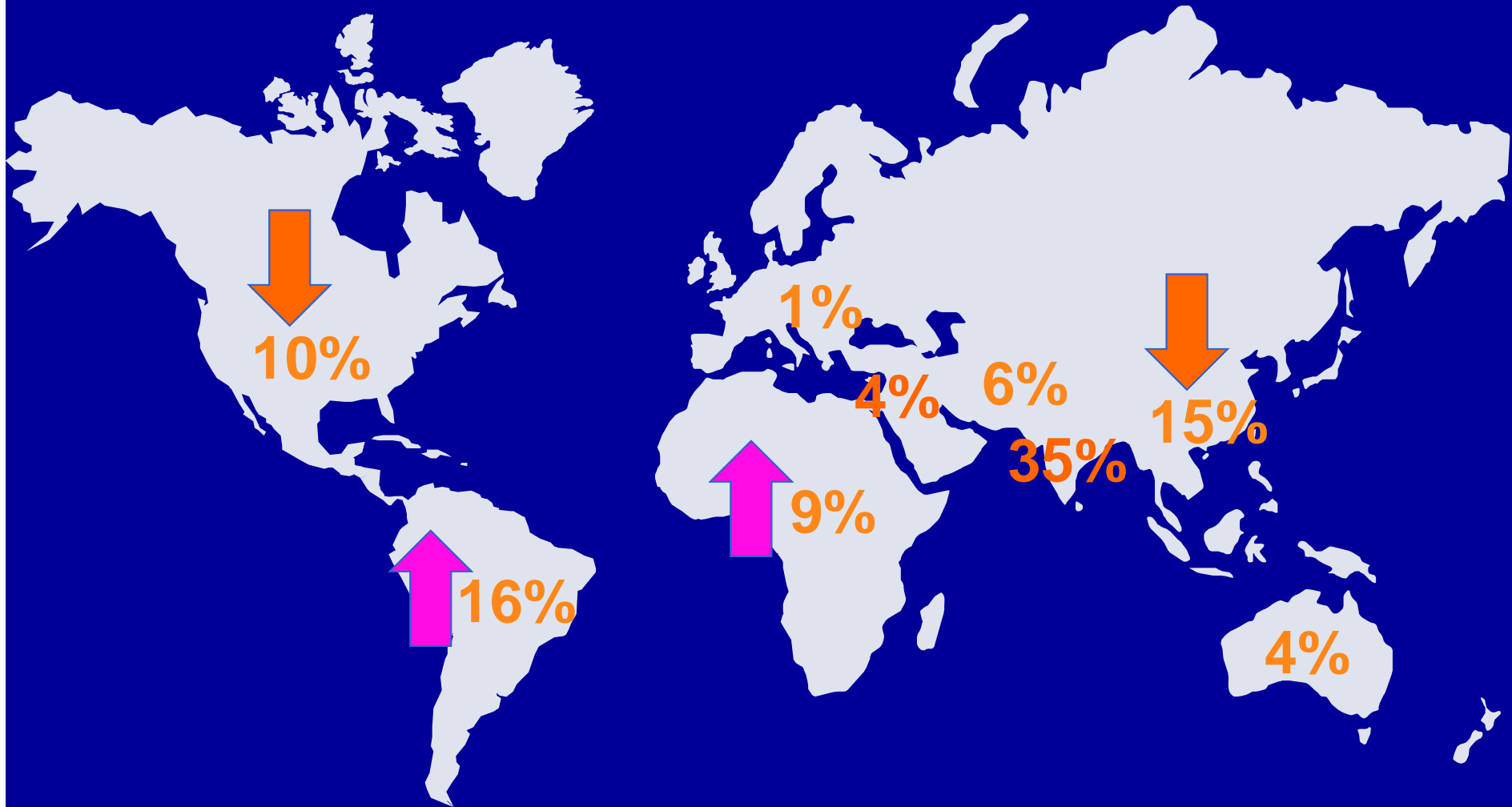
# World Cotton Mill Use 2012/13



# World Cotton Mill Use 2022/23



# World Cotton Production 2022/23



# **ICAC 72<sup>nd</sup> Plenary Meeting**

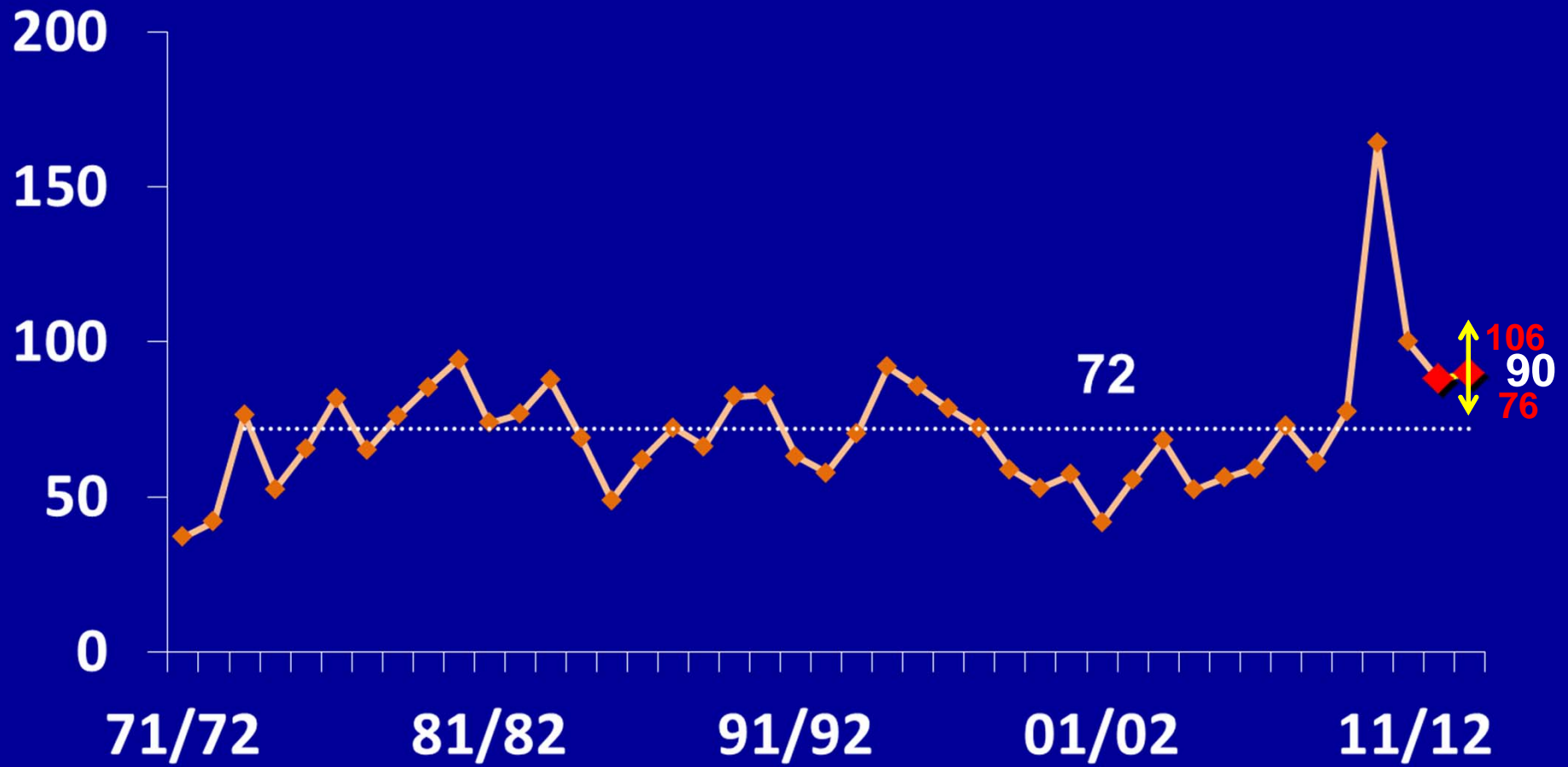
**Cartagena, Colombia:**

**Support the WTO,  
Doha Round Must be Completed,  
Cotton Integral to the DDA**

**73<sup>rd</sup> Meeting in Thessaloniki, Greece 2-7  
November 2014**

# Season-Average Cotlook A Index

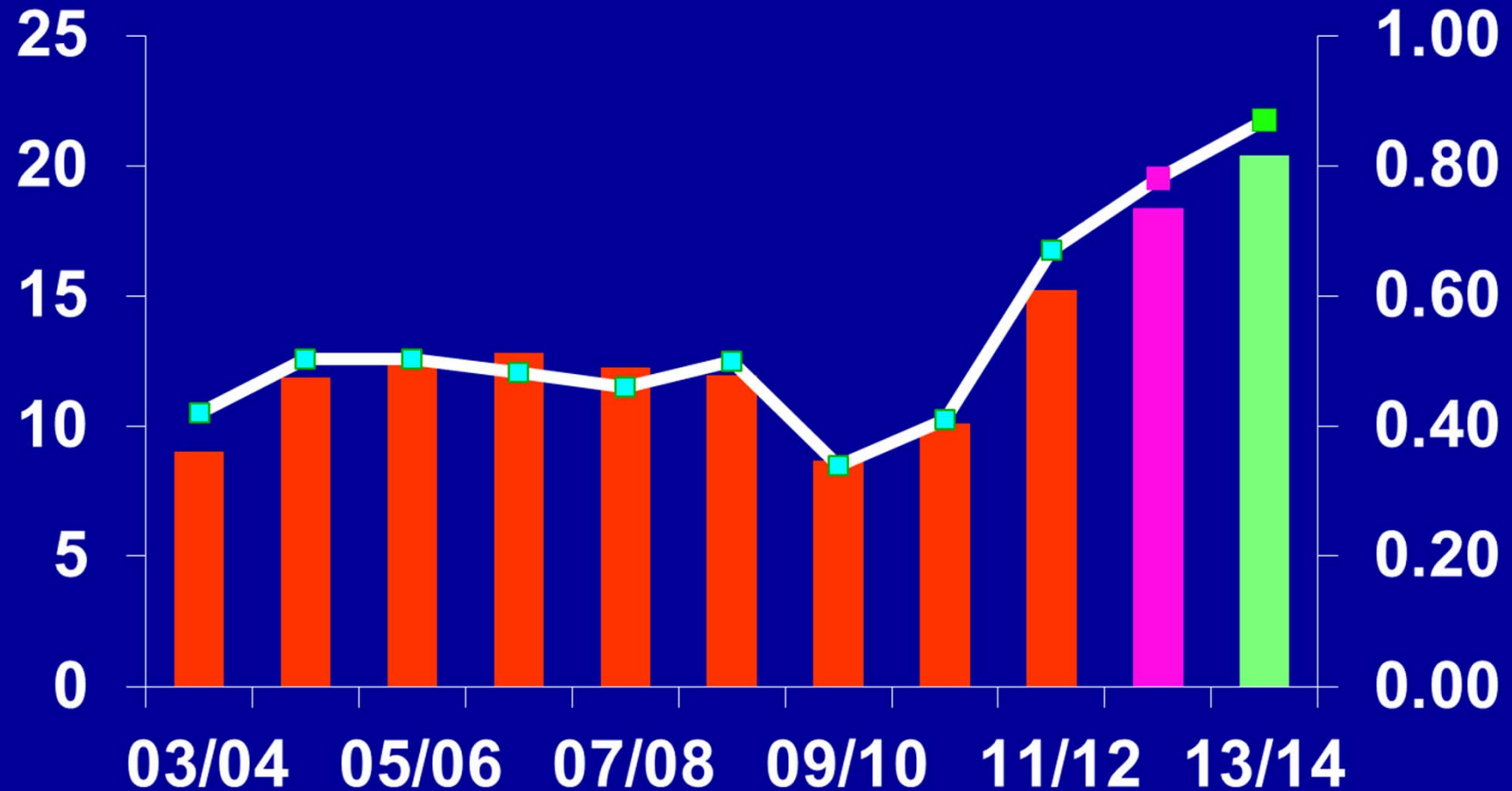
US cents/lb



# World Ending Stocks

Million tons  
(bars)

Stocks-to-Use Ratio  
(line)



# **New leadership at ICAC: Executive Directors**

**Whitaker, USA**

**Evans, USA**

**Santley, UK**

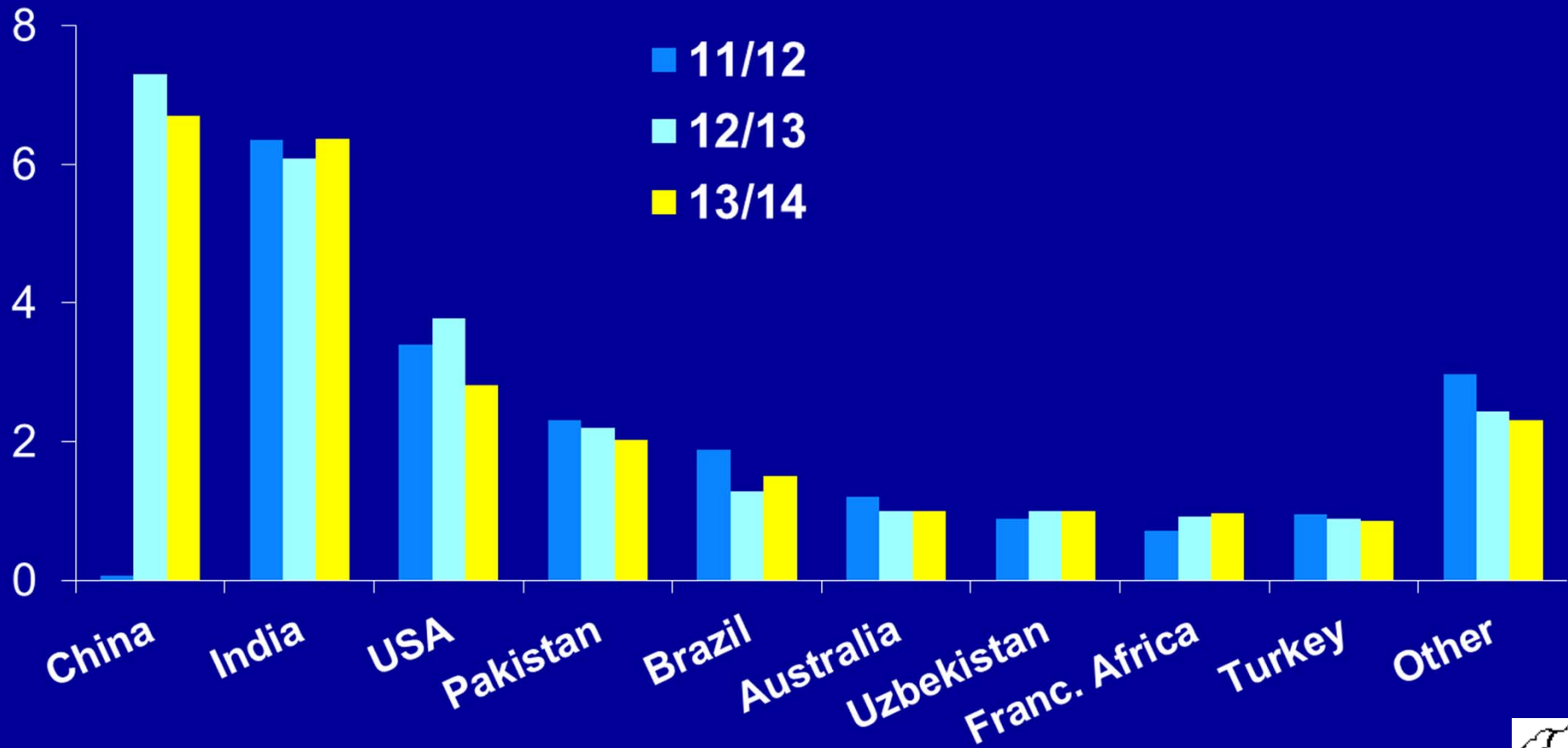
**Shaw, USA**

**Townsend, USA**

**Sette, Brazil**

# Cotton Production

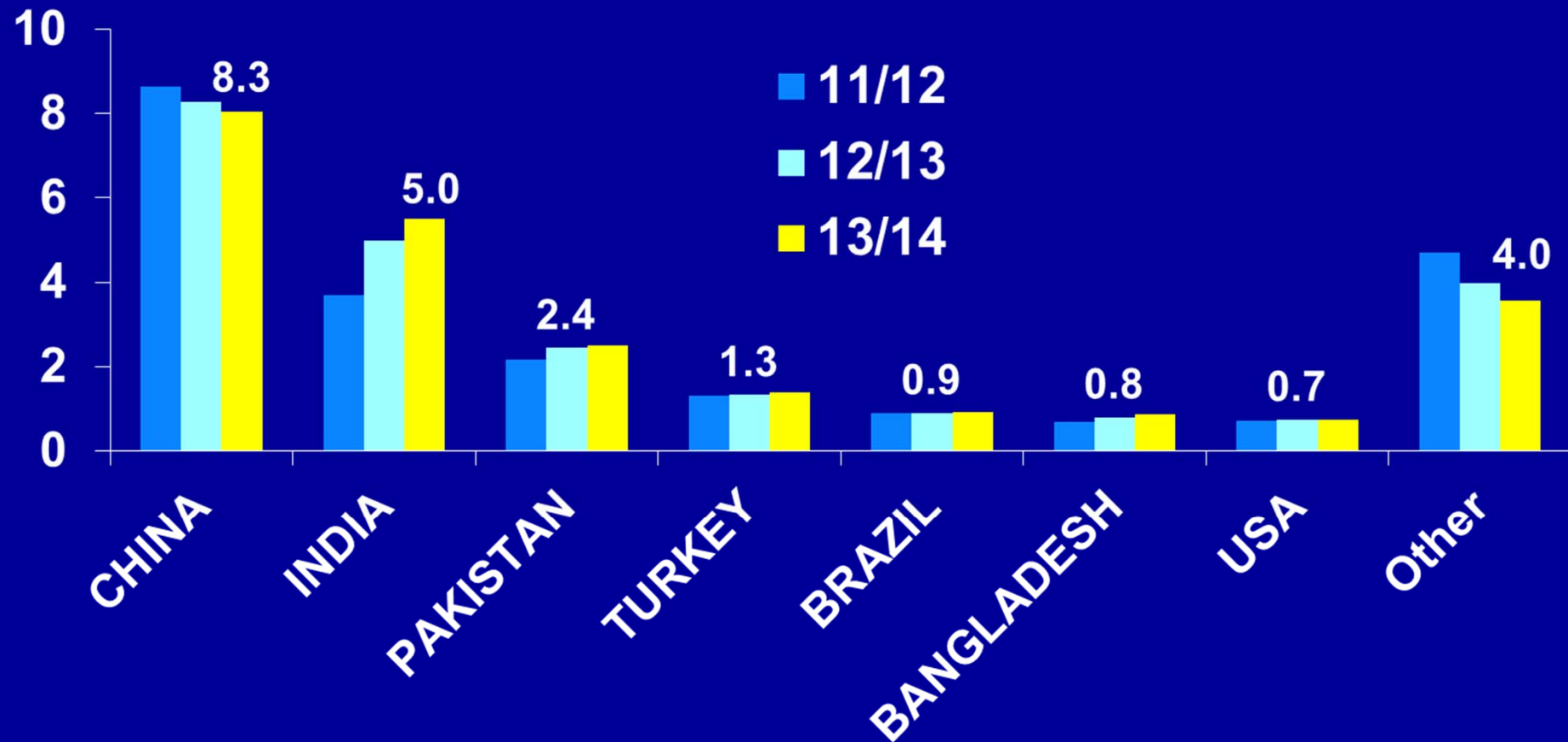
Million tons





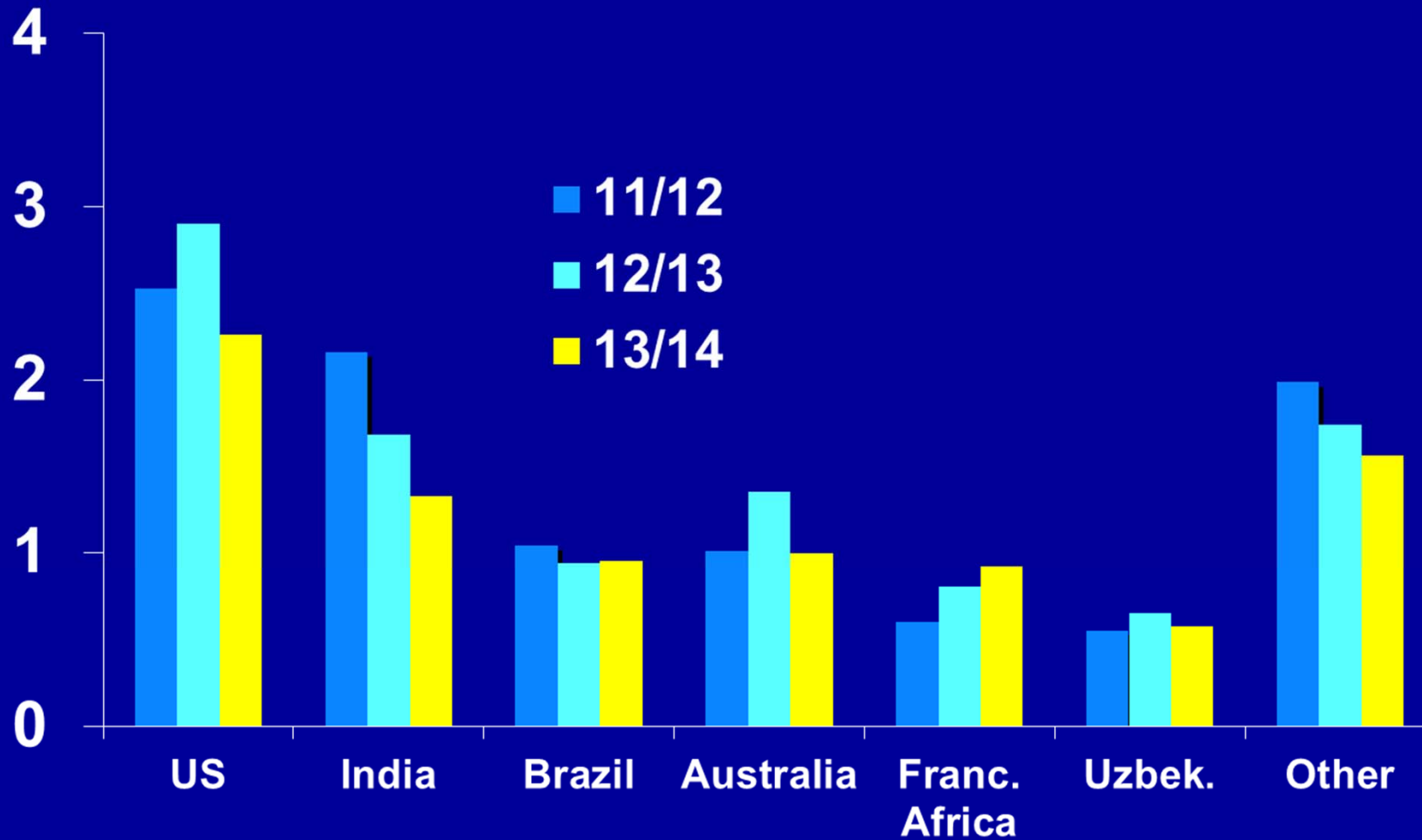
# Cotton Mill Use

Million tons



# Cotton Exports

Million tons



# Cotton Imports

Million tons

