COTTON MILL USE:
THREATS & OPPORTUNITIES

DG’s Consultative Framework Mechanism On Cotton
Geneva
24 July 2017

International Cotton Advisory Committee
Population and Income Growth Do not guarantee Market Relevance
MARKET SHARE OF COTTON

Average 1960-1979

Average 1980-1999

Average 2000-2016
COTTON MILL USE

- Vietnam: 1.0 million tons (15/16), 1.5 million tons (16/17), 2.0 million tons (17/18)
- Turkey: 1.5 million tons (15/16), 1.0 million tons (16/17), 1.5 million tons (17/18)
- Bangladesh: 1.0 million tons (15/16), 1.5 million tons (16/17), 2.0 million tons (17/18)
- Pakistan: 2.0 million tons (15/16), 3.0 million tons (16/17), 5.0 million tons (17/18)
- India: 5.0 million tons (15/16), 5.5 million tons (16/17), 6.0 million tons (17/18)
- China: 7.5 million tons (15/16), 7.5 million tons (16/17), 8.0 million tons (17/18)

Units: million tons
Nitrogen Use in Cotton Production, Kg/Ha

- Aust.
- Brazil
- B.F.
- Cam.
- Egypt
- Iran
- Kazak.
- Mali
- Pak.
- Tanz.
- Turkey
- USA
- Zam.
- Zim.
African Cotton: Realistic Potential

Production:
- 6 million Ha
- 500 kgs lint/ha
- 3 million tons

Mill Use:
- 0.8 million tons (3% of world)
African Cotton: Potential

What’s Different?

• Population & Income Growth
• Investment-friendly Policies
• Trade Preferences
• Improved Access to Capital
African Cotton: Potential

Chief Constraints:

• Labor Productivity
• Infrastructure, power
World Cotton Mill Use 2016/17

North America: 5%
South America: 5%
Europe: 2%
Asia: 36%
Africa: 1%
Oceania: 7%
World Cotton Mill Use 2026/27

- 35% in Asia
- 29% in Europe
- 5% in North America
- 4% in South America
- 3% in Africa
- 8% in Australia
- 8% in Latin America
- 3% in India

Note: The map indicates the percentage of cotton mill use in different regions for the year 2026/27.
CHANGES IN COTTON MILL USE

1996/97
19 million tons

- China: 23%
- ROW: 29%
- India: 15%
- USA: 13%
- Pakistan: 8%
- Brazil: 4%
- Turkey: 6%
- Indonesia: 2%
- 7 Countries: 70%

2017/18
24.7 million tons

- China: 31%
- India: 21%
- Pakistan: 9%
- USA: 3%
- Vietnam: 5%
- Turkey: 6%
- Bangladesh: 6%
- ROW: 13%
- Indonesia: 3%
- Brazil: 3%
- 9 Countries: 87%
CHANGES IN COTTON MILL USE

2017/18
24.7 million tons

China 31%
India 21%
ROW 13%

Indonesia 3%
Brazil 3%
USA 3%
Vietnam 5%
Turkey 6%
Bangladesh 6%
Pakistan 9%

9 Countries: 87%

2026/27

South Asia 35%
China 29%
East Asia 8%
North America 8%
South America 8%
Central Asia 5%
Europe 4%
Africa 3%

North America 8%
South America 8%
Central Asia 5%
Europe 4%
Africa 3%

9 Countries: 87%
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