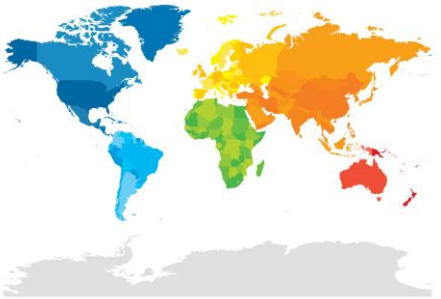
INTERNATIONAL COTTON ADVISORY COMMITTEE

WORLD COTTON MARKET OUTLOOK

WTO Cotton Day
26th October 2026

Presented by
Parkhi Vats
Principal Statistician
& Data Architect
ICAC



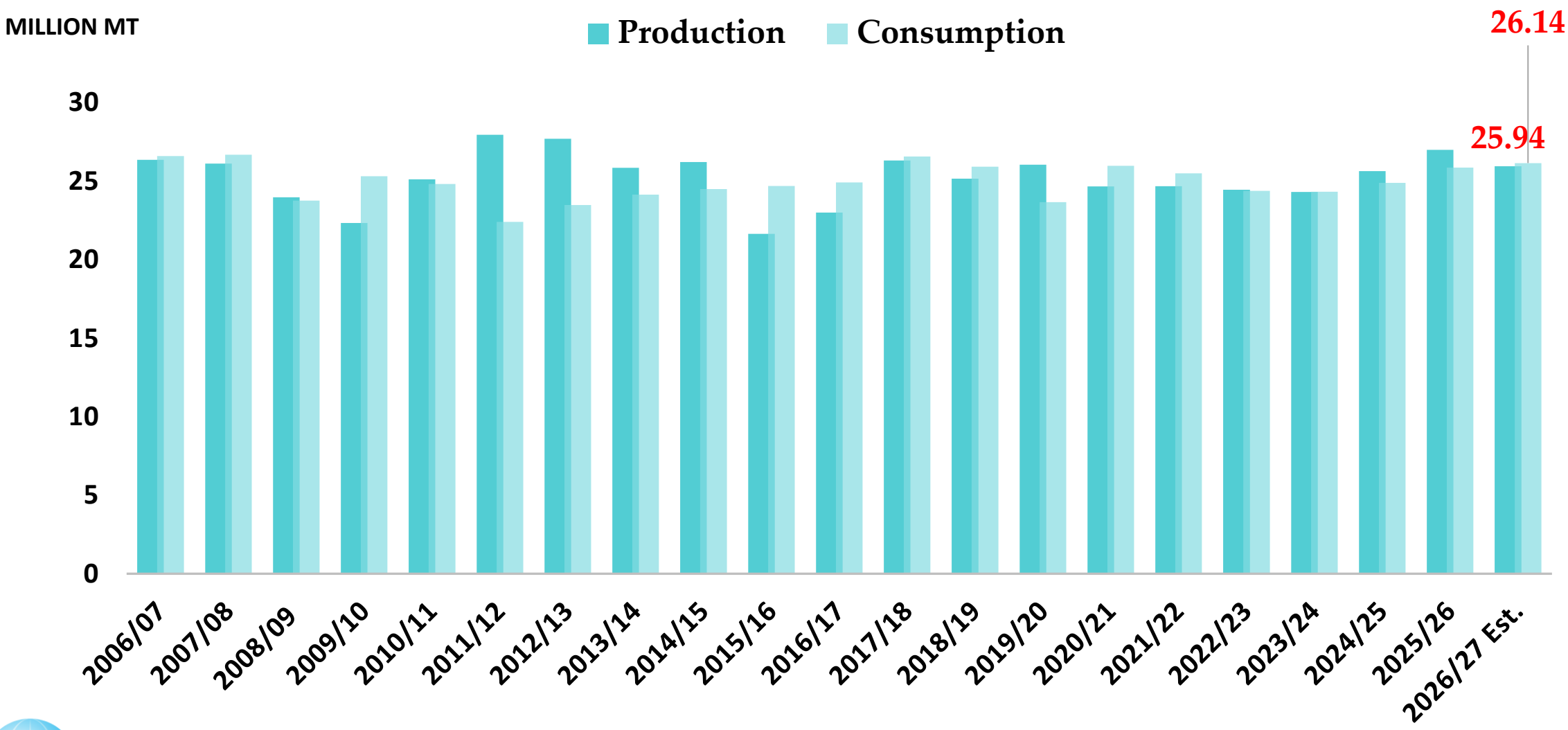






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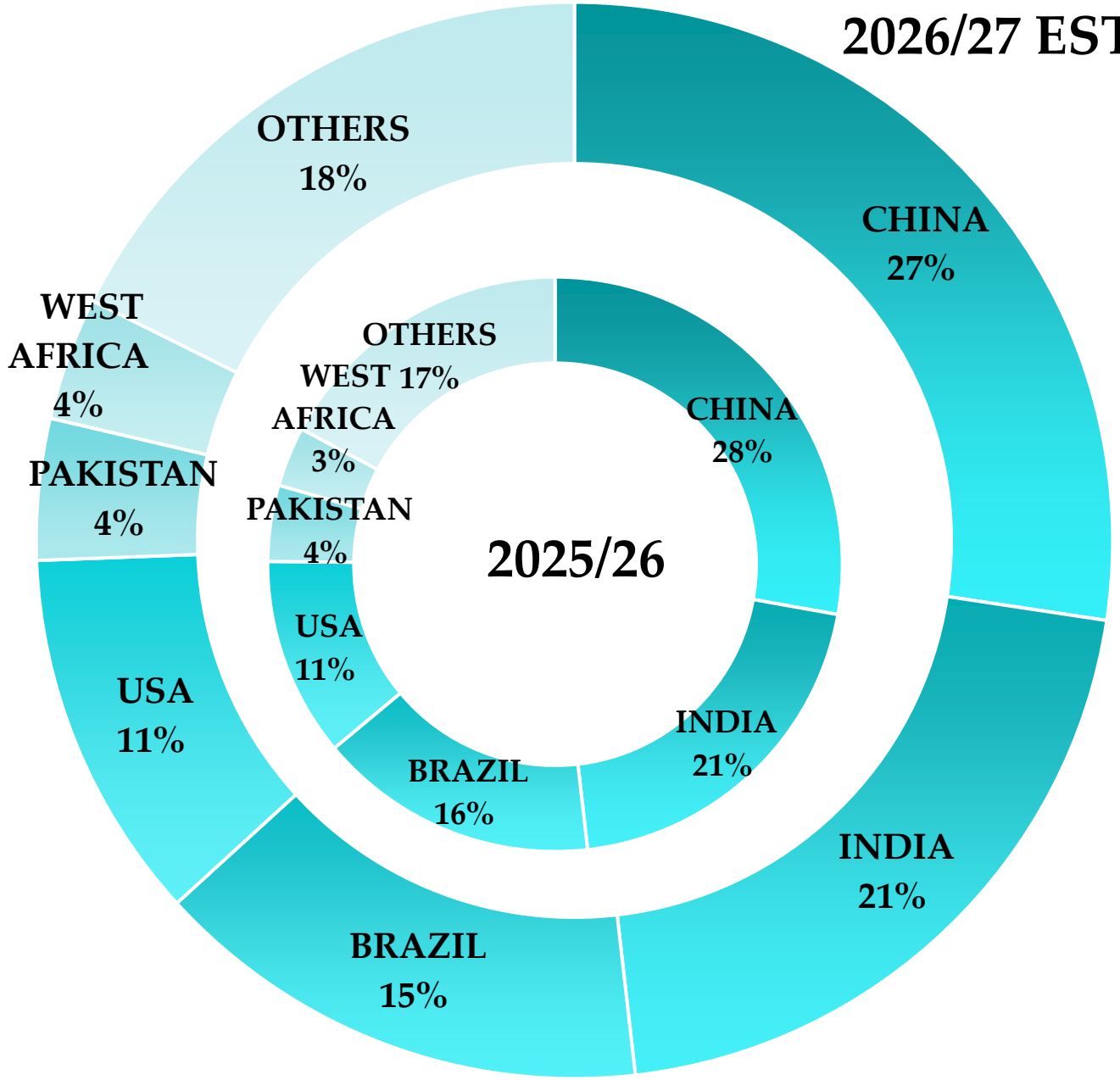
Consumption slightly outpacing production in 2026/27 est.



Source:- Parkhi Vats, ICAC

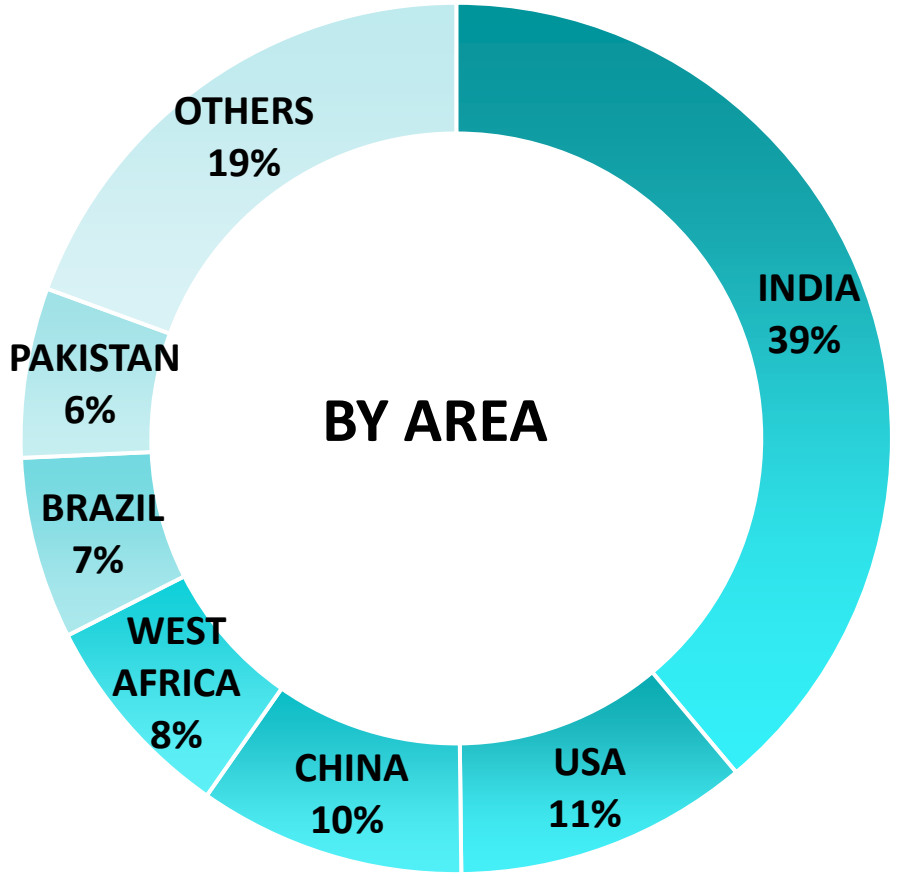
Leading producers

As a percentage of total world cotton lint production



Source:- Parkhi Vats, ICAC

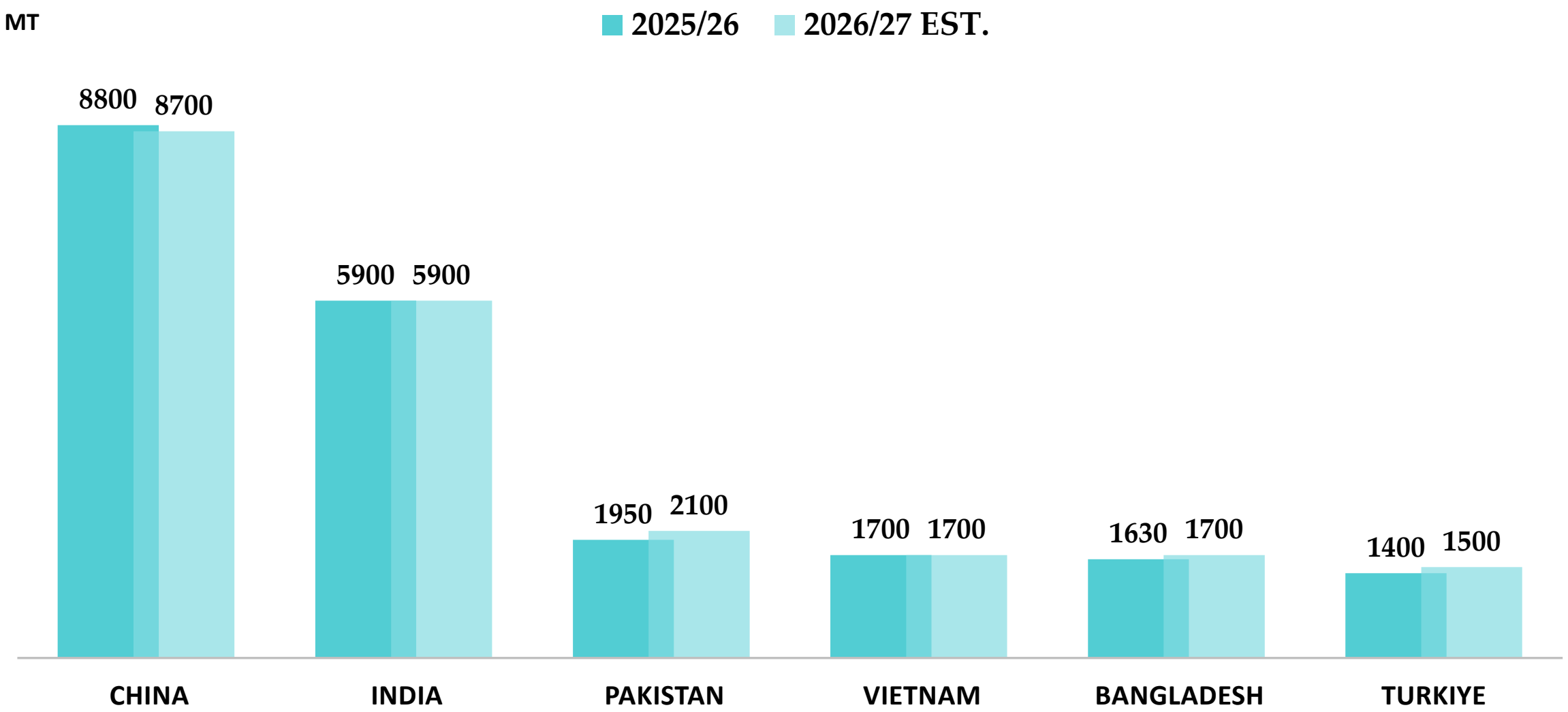
Leading countries in area under cotton and their yields in 2026/27 est.



Leading countries in area and their respective yield in 2026/27 est.			
	AREA	YIELD	PROD
	000 ha	kg/ha	000 mt
WORLD TOTAL	30225	858	25939
INDIA	11800	458	5400
USA	3304	878	2900
CHINA	3000	2367	7101
WEST AFRICA	2392	401	959
BRAZIL	2050	1902	3900
PAKISTAN	1910	576	1100

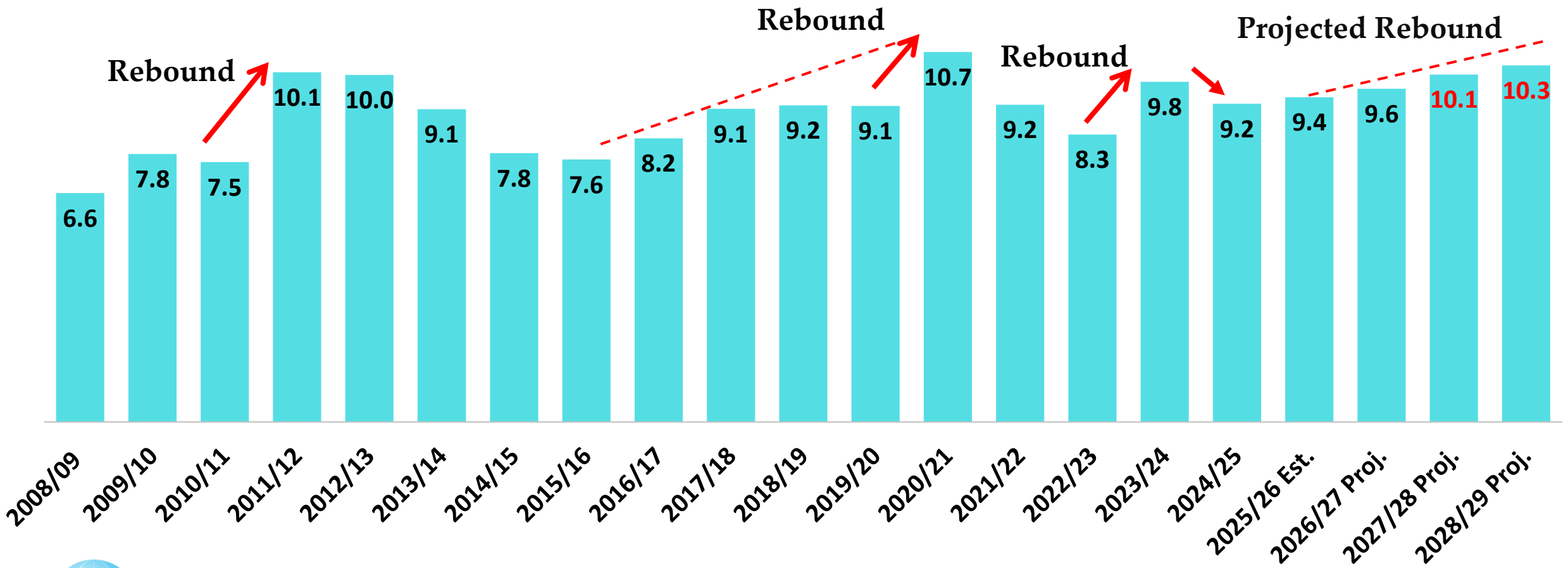
Source:- Parkhi Vats, ICAC

Leading consumers



Source:- Parkhi Vats, ICAC

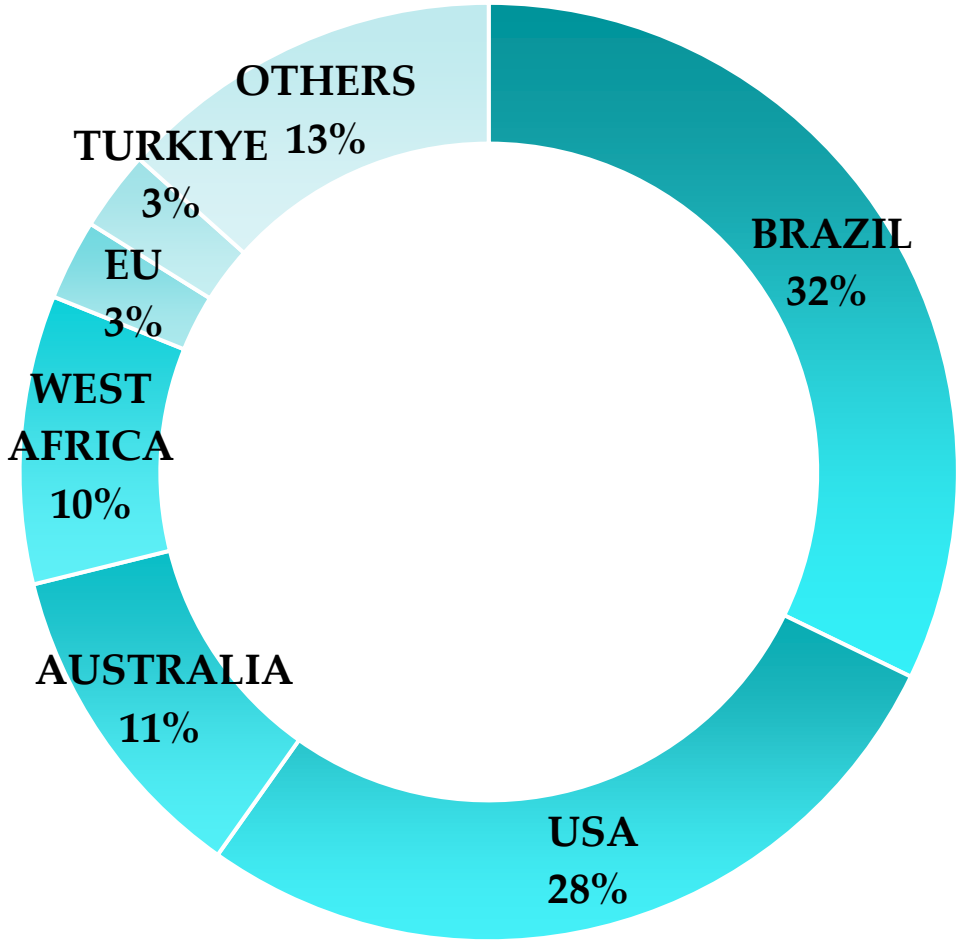
World trade trend projections for 2026/27, 2027/28 and 2028/29 season



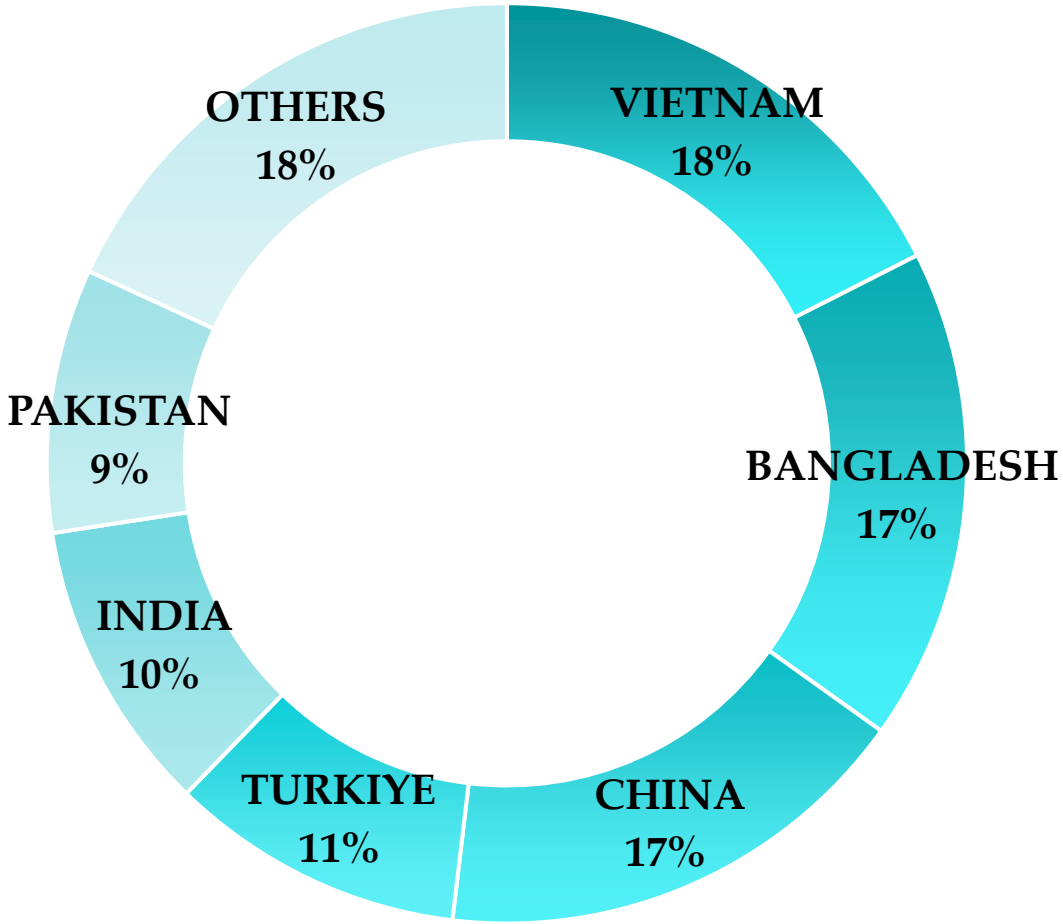
Source:- Parkhi Vats, ICAC

Leading Traders in 2026/27 est.

Leading Exporters

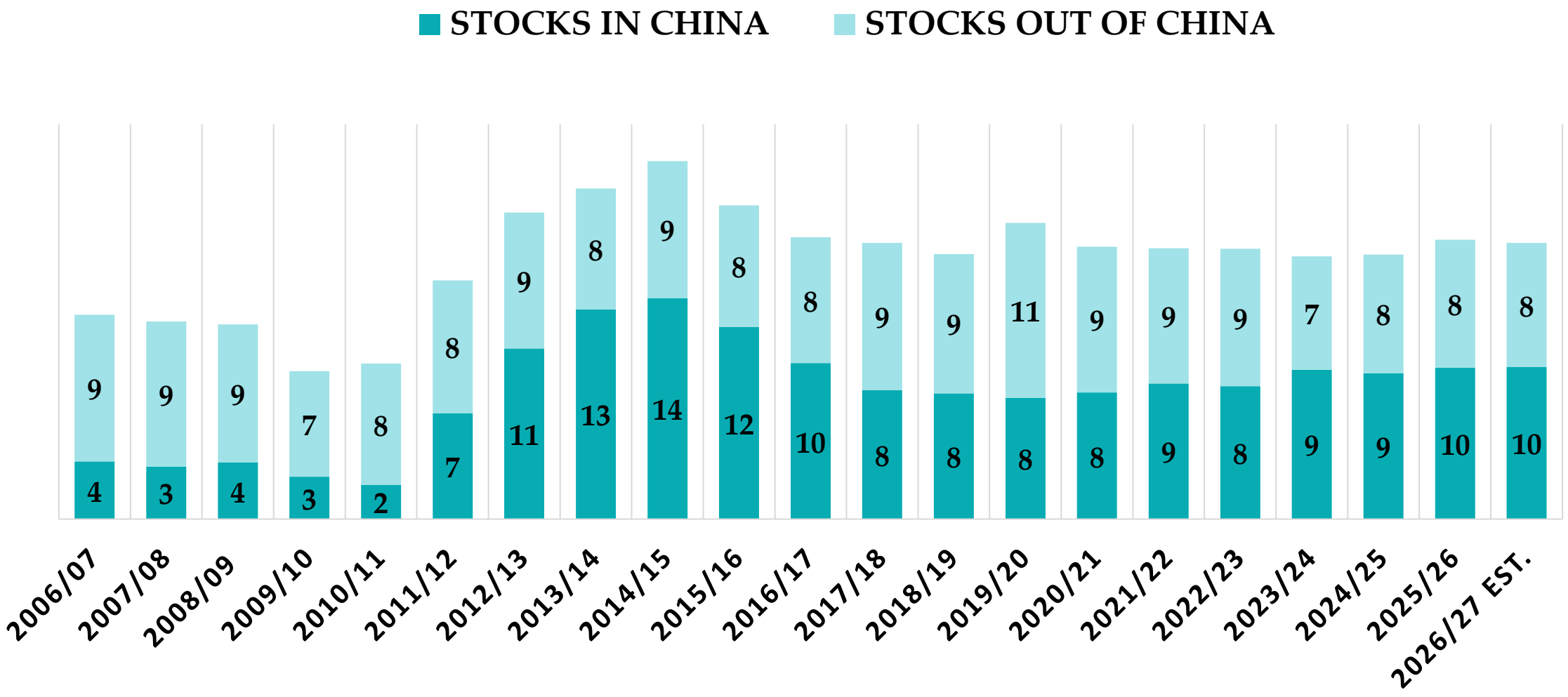


Leading importers



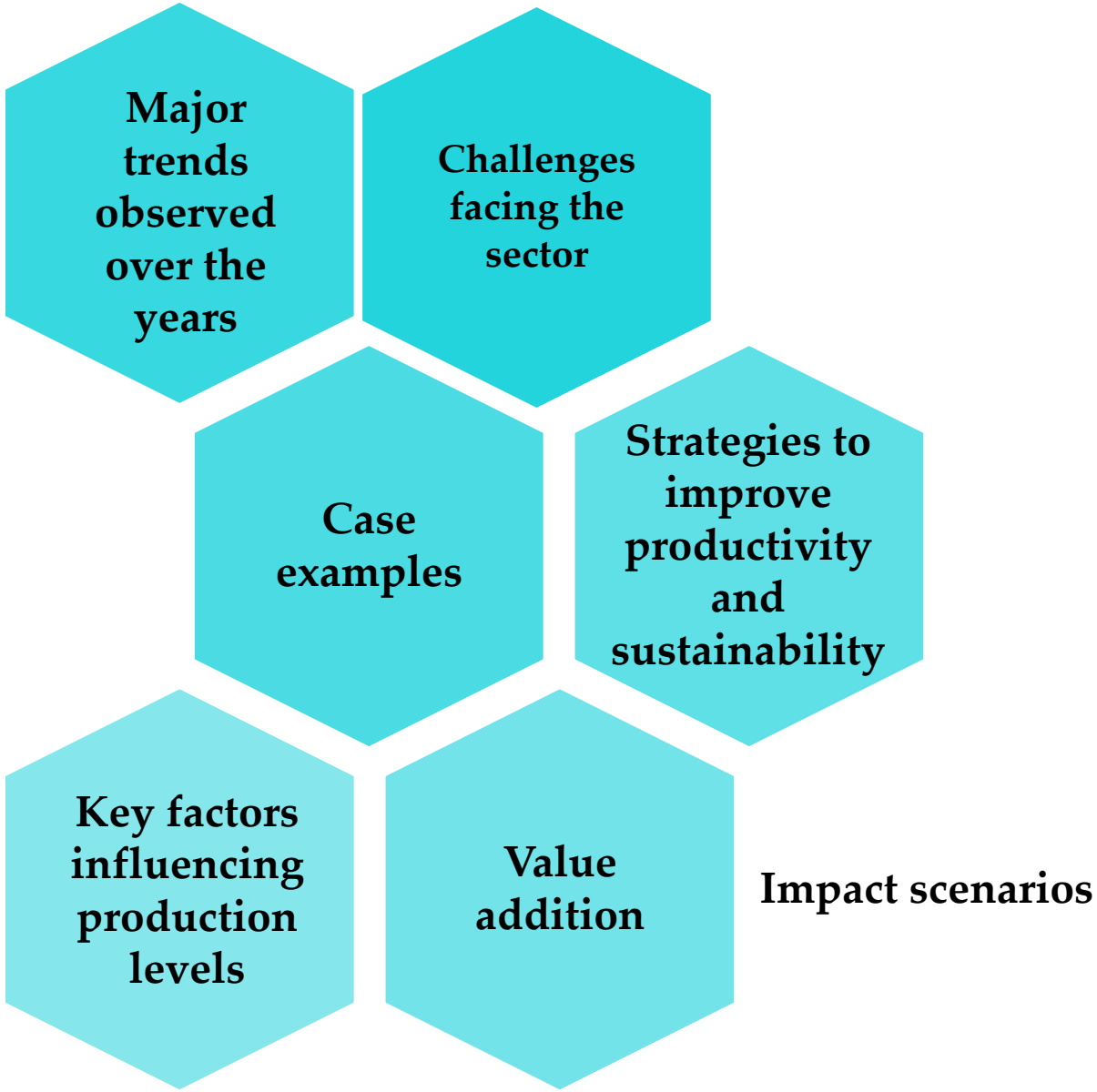
Source:- Parkhi Vats, ICAC

World cotton lint stocks outlook



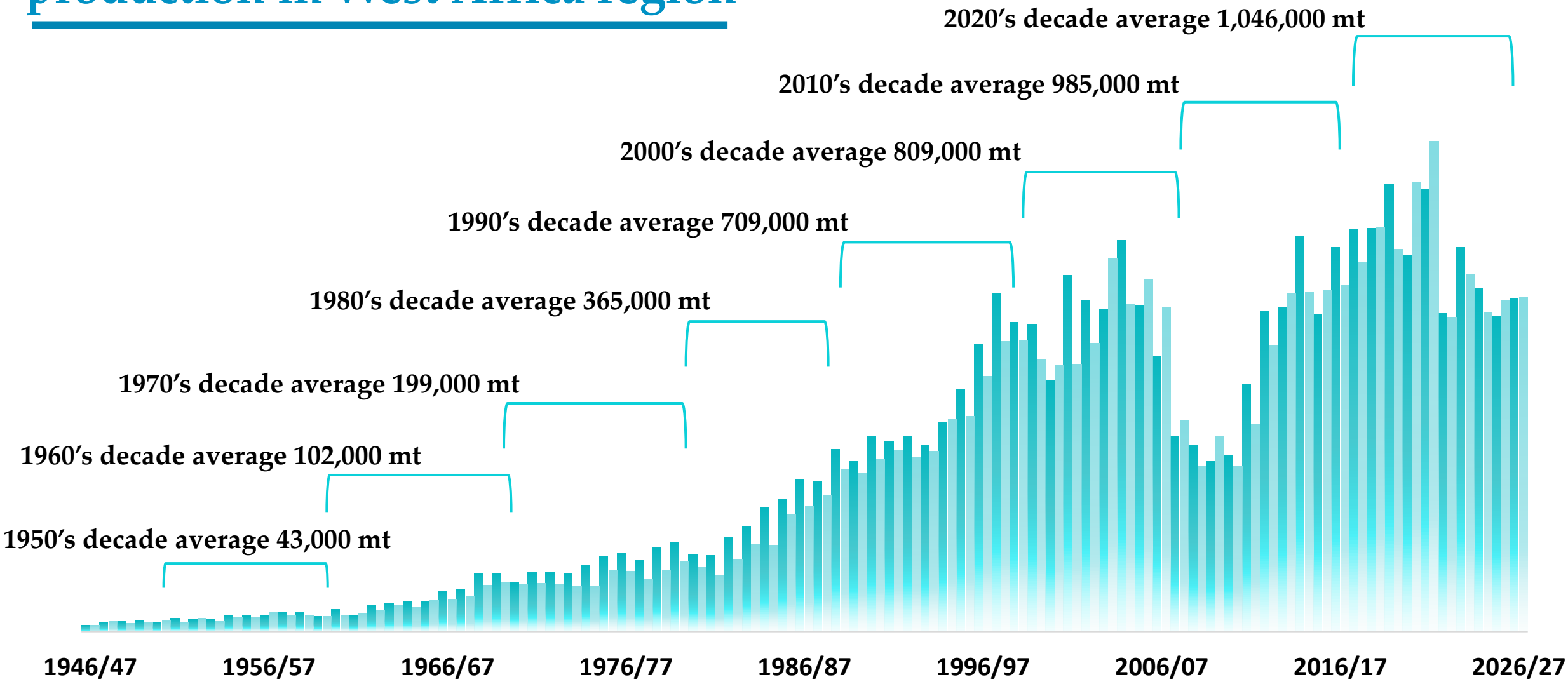
Source:- Parkhi Vats, ICAC

Evolution of cotton production in West Africa region



Source:- Parkhi Vats, ICAC

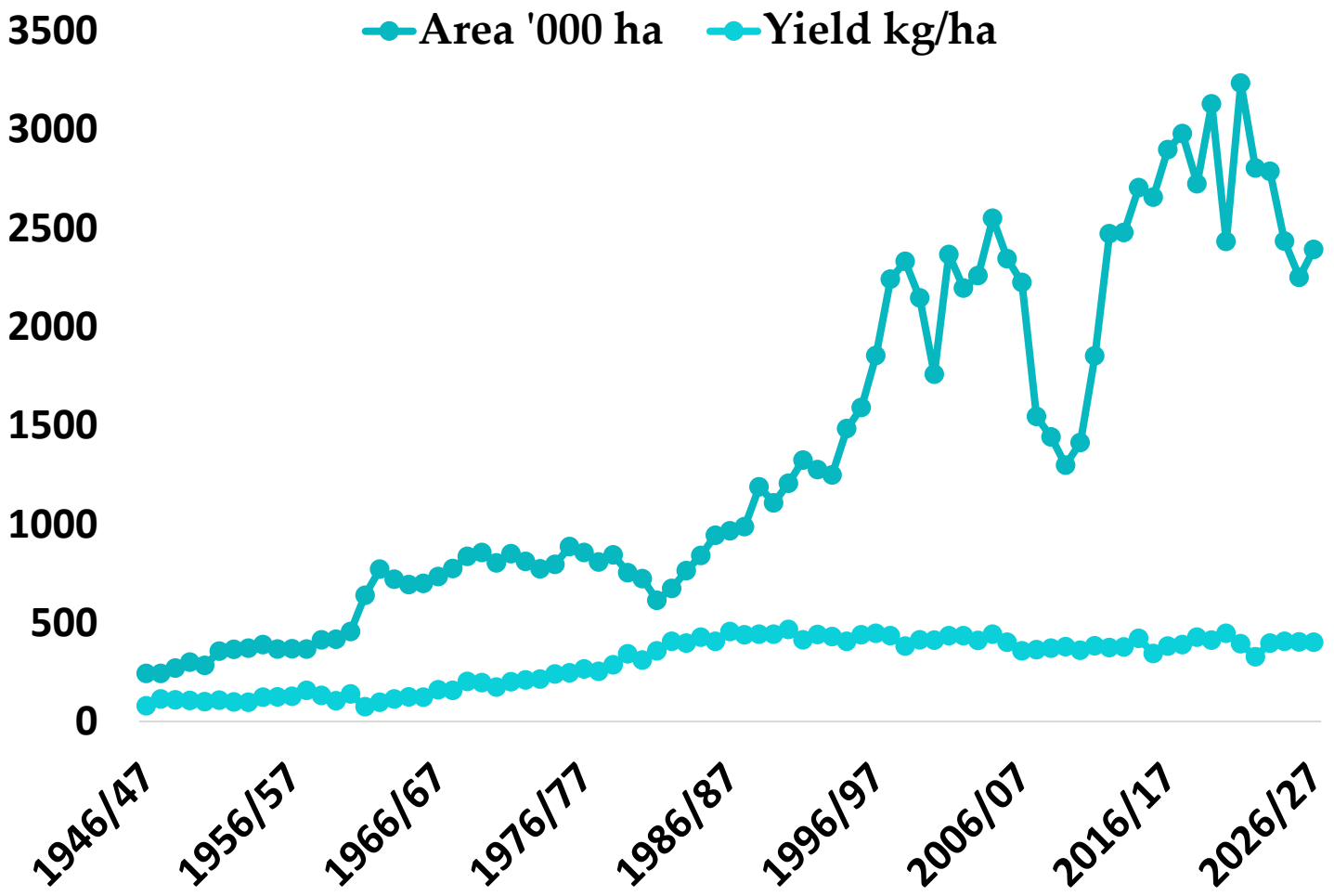
Evolution of cotton production in West Africa region



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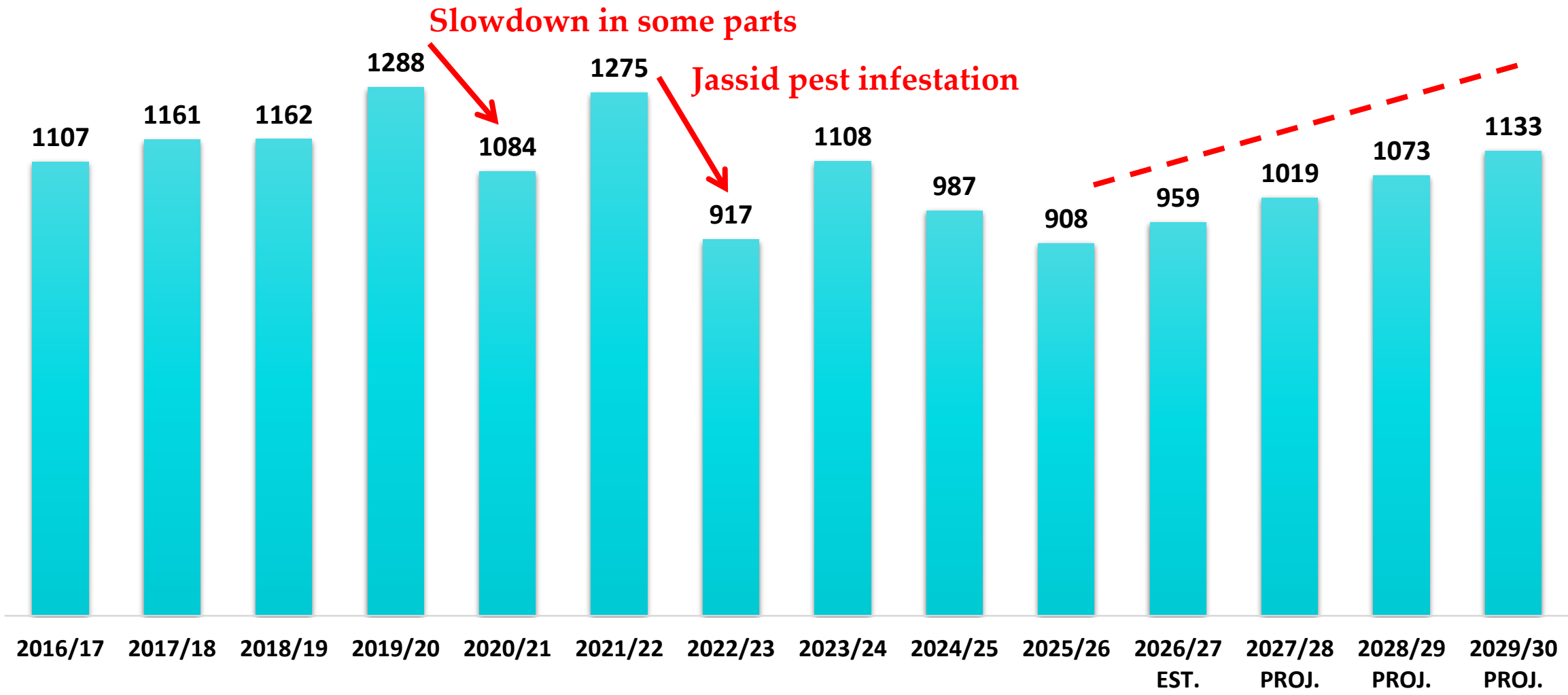
Source:- Parkhi Vats, ICAC

Production growth was driven almost entirely by the expansion in cotton acreage while yields remained largely stagnant



Source:- Parkhi Vats, ICAC

West Africa production trend and projections



Source:- Parkhi Vats, ICAC

Improvements in key variables may increase cotton production in West Africa region

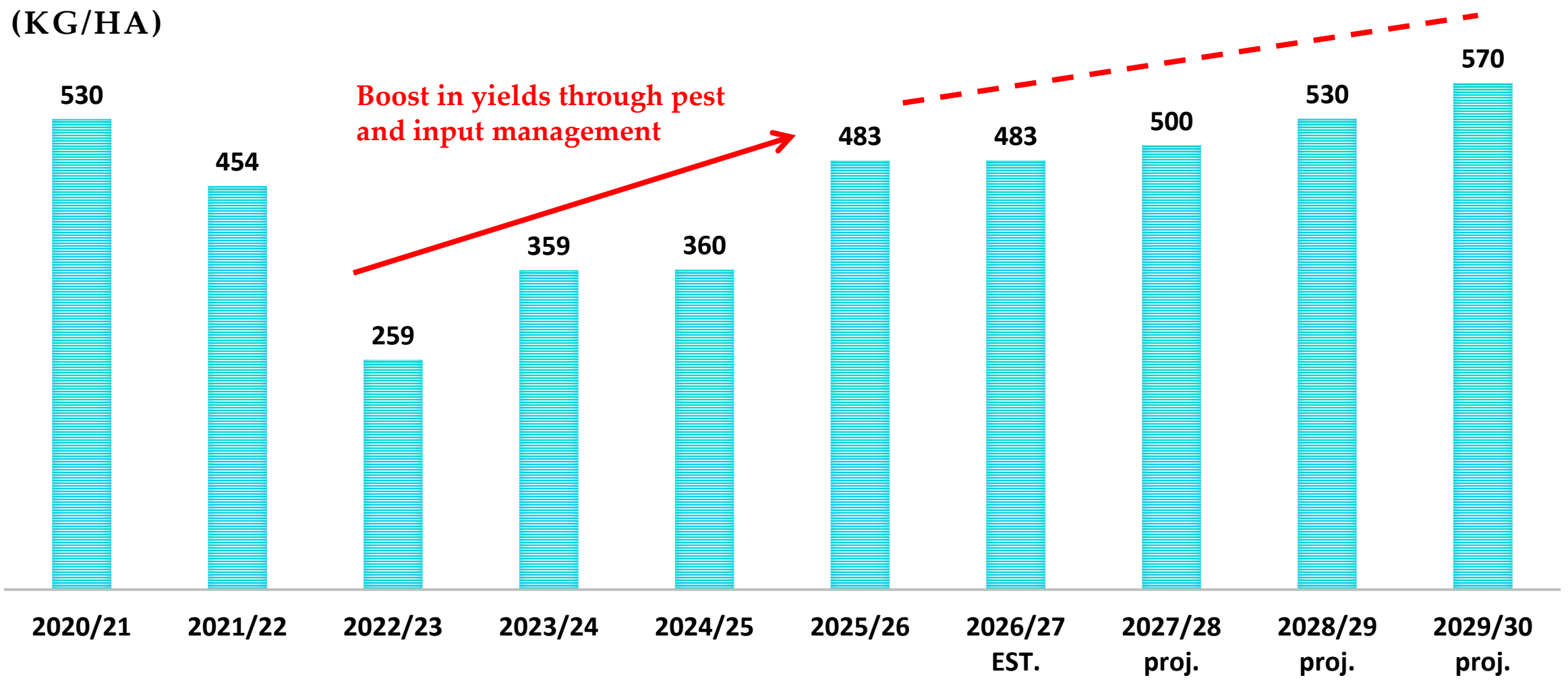
Improved producer confidence, area, yield and production



- **Pest Management**
- **Favorable weather conditions**
- **Farm gate prices**
- **Access to production inputs**

Source:- Parkhi Vats, ICAC

Case example :- Increasing yields in Cote d'Ivoire



Source:- Parkhi Vats, ICAC

Other opportunities to strengthen West Africa's cotton sector

- Using Biochar and Bokashi to boost cotton yields
- Identifying new export partners
- Value addition through cotton by products
- Value addition through domestic processing

Source:- Parkhi Vats, ICAC

Impact Scenario
if yields in West Africa increase to the world average, world lint production would increase by nearly 1 million tonnes

Current



Impact scenario



Source:- Parkhi Vats, ICAC

Identifying new export markets

Increase in India's cotton imports from the West Africa region		
approx. calculations (tonnes)		
	2024/25 est.	2025/26 est.
Mali	38419	95747
Cote d'Ivoire	26947	26619
Benin	1527	11576
Togo	21208	9591
Burkina Faso	6669	7186
Senegal	12474	7089
Cameroon	10109	7057
Chad	9719	3834



India’s Duty-Free Tariff Preference (DFTP) Scheme



China's Zero-Tariff Access to all 53 African countries

Source:- Parkhi Vats, ICAC

Value addition by exports of cotton by products
West Africa region by country 2025

COTTON SEED		
	Cotton seed Exported Value ('000 US$)	Cotton seed Exported Quantity (Tonnes)
Benin	25,675	114,362
Togo	1,852	12,022
Burkina Faso	24	420

COTTON SEED OIL		
	Cotton Seed-Oil Exported Value ('000 US$)	Cotton Seed-Oil Exported Quantity (Tonnes)
Cote d'Ivoire	2764	6777
Burkina Faso	2585	1947
Benin	1323	1148

COTTON SEED CAKE		
	Cotton Seed-Cake Exported Value ('000 US$)	Cotton Seed-Cake Exported Quantity (Tonnes)
Benin	20225	98445
Cote dIvoire	14892	75318
Burkina Faso	8046	29038
Mali	937	3008

Source:- Cotton Data Book, Dr. Kranti, ICAC

Value addition through domestic processing

VALUE ADDITION BY DOMESTIC PROCESSING By exporting cotton yarn instead of cotton lint, the West African region could increase its export revenue by approximately US$900 million.		
	Total value of exports	Approximate value of yarn exports (1.7 times higher than cotton lint exports)
	Million USD	
Benin	385	655
Burkina Faso	165	281
Cameroon	292	497
Chad	14	24
Cote d'Ivoire	188	320
Mali	203	346
Senegal	11	18
Togo	32	55
TOTAL	1291	2195
calculation made in calender years		
for cameroon 2024 figures were used. For Mali 2021 export values are used		
1.7 times is world average and may differ from region to region		

Source:- Parkhi Vats, ICAC

Thankyou

You can also send questions at

Parkhi@icac.org