

Trends of Production, Consumption, Import and Export of Cotton - Indian Scenario

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In this article, exclusively the data relating to production, consumption, import and export of cotton during the last two decades period have been presented. The source of data for all the above are is the Government's published figures of formerly Cotton Advisory Board (CAB), till 2019-20 and subsequently the data recommended by the New Committee on Cotton Production and Consumption (COCPC), formed by the Government in September, 2020, replacing the CAB.

It may be relevant to mention that the composition of the above two Committees is comprehensive, considering that every aspect of cotton sector is represented in the above two Committees, viz. cotton crop forecast agencies, representatives of all cotton producing States, Ministries/Departments representing agriculture crops, important Cotton Trade Bodies, Central Institutes for Cotton Technology and Cotton Research, viz. Central Institute for Research

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on Cotton Technology (CIRCOT), and Central Institute for Cotton Research, (CICR), Cotton Ginning and Pressing Sector and Government Departments concerned with regular maintenance of statistics relating to production, consumption, import and export of cotton, viz. Office of the Textile Commissioner, Ministry of Textiles, Government of India, Mumbai and Directorate General of Commercial Intelligence and Statistics (DGCI&S), Kolkata.

Attributes of Cotton

Rightly called the queen of fibres, cotton is one of the most significant cash crops in India and plays a key role in the Indian economy. It has been grown from time immemorial to clothe the people of the country and is also the mainstay of textile and other related industries, world-wide. On account of its agricultural and industrial importance, it is also called as "white gold". Cotton is also a dual purpose crop, as it is a source of fibre as well as edible oil. It also supports the livelihood of about 60 million people engaged in cotton cultivation, cotton trade, processing, textile manufacture and other related activities.

Its importance as a significant natural fibre crop of global importance can be gauged simply from the fact that it is commercially grown in about 90-100 countries with a global area of 33.16 million hectares, accounting for 25.89 million metric tonnes of cotton production with a productivity of 780.8 kg/ha, as per the latest report of International Cotton Advisory Committee, ICAC (June, 2022)

Production of Cotton:

In India, cotton is presently grown in an area of about 130 lakh hectares (though during the current year i.e. 2021-22, the area estimated is much lower at 120.55 lakh hectares), India stood at around 3rd position in the production of cotton till the year 2006-07/2007-2008 i.e. behind China and U.S.A. However, from the year 2010-11, especially after the commercialisation of Bt. cotton hybrids in the year 2002 and the launching of Technology Mission on Cotton (TMC) in the year 2000, the position dramatically changed and India jumped to the top position in cotton production from the year 2013-14, over taking China and U.S.A. Nevertheless, the production of cotton in the country could not make much headway, as more than 65% of the area of cotton is under rainfed cultivation in India. The same is reflected from the production data of last 20 years period given in Table - 1

Table 1 : Production of Cotton(In lakh bales of 170 kgs each)

Years	Production
2000-2001	140.00
2005-2006	241.00
2010-2011	339.00
2011-2012	355.00
2012-2013	365.00
2013-2014	398.00
2014-2015	386.00
2015-2016	332.00
2016-2017	345.00
2017-2018	370.00
2018-2019	333.00
2019-2020	365.00
2020-2021	352.48
2021-2022	315.43 (P)

P = Provisional Source: COCPC

Two leading cotton growing states in India are Gujarat and Maharashtra which together account for 20% and 34-35% of area under cotton in the country. (year 2020-21 and 2021-22). Maharashtra which has the highest cotton growing area is cultivated mostly under rainfed condition. These two states together contribute nearly 50% of India's total cotton production.

The average yield is much higher in Gujarat than in Maharashtra, on account of better irrigated facilities in Gujarat. In the Northern states of Punjab, Haryana and Rajasthan, cotton is grown under irrigated cultivation. However, the overall area in the Northern region is hardly 13-14% of the total cropped area, contributing about 18% to 20% of India's total cotton production.

According to the "Handbook of Cotton in India", published by the 'Indian Society for Cotton Improvement' (ISCI), Mumbai in the year 2000, the production of cotton rose six folds from 2.3 million bales of lint in 1947-48 to an all-time high of 17.8 million bales during 1996-97. The productivity also rose significantly from 90 kg to 330 kg of lint per hectare. These gains in production and productivity were possible due to adoption of high yielding varieties and hybrids (40% area under hybrids) and an increase in irrigated area from 8% to 36%.



Declining Output: Yield Needs Improvement:

The highest production of cotton in India of 398 lakh bales was achieved in the year 2013-14. But thereafter, there has been a fluctuating trend in production of cotton from year to year and now 315.43 lakh bales production in 2021-22 is almost the lowest crop since the last two decades. Since the area under cultivation has been more or less steady year after year at about 120 lakh to 125 lakh hectares, the resultant decline has been on account of extremely low productivity. Further, the attack of insect pest also contributes to the low productivity more often than not.

The major hurdle in cotton production in India is its low productivity which is not all encouraging when compared to either developed economies or even the neighbouring Pakistan.

According to the Indian Society for Cotton Improvement (ISCI), the national goal is to enhance the average yields to not only global average of 770 kgs. lint/ha within 2020, but also to much higher levels of 1000 to 1200 kg/ha obtained by USA, China, Turkey and others, if not Australia (2200 kg/ha).

Incidentally, if this declining production situation for the latest two years i.e. 2020-21 and 2021-22 continues for 2-3 years, India may again become a net importer of cotton, as against its present status of a major exporter of cotton.

Consumption of Cotton:

According to a recent report of Cotton Association of India, India being the second largest consumer and the second largest exporter of cotton, enjoys a predominant position in the world cotton market.

Incidentally, cotton though mainly grown for fibre, is also ranked as major oilseeds crop

in the international market. Out of the four-five major products that cotton provides that is lint meal, linters, hull and oil, lint and oil are the most important. Cottonseed oil is also used for edible purpose, after refining.

The data on consumption of cotton in India from the year 2000-2001 to 2021-2022 presented in Table 2, will show that cotton consumption in India has been growing from year to year, though modestly. In spite of an increase regularly taking place in the consumption of man-made fibres like viscose and polyester, cotton still contributes more than 70% to the over-all consumption of all textile fibres in the country.

The present consumption of cotton in India (both mills and non-mill taken together) is 326 lakh bales, as per the latest estimates of the Committee on Cotton Production and Consumption (COCPC), in their meeting held on 23rd May, 2022. The lower consumption in the current cotton year i.e. 2021-22 is on account of trend of consumption of cotton witnessed in the initial five-six months of the cotton season 2021-22 (October-September) and also due to the fact that many of the mills in Southern zone are diverting to viscose and polyester fibre as against cotton.

Table 2 : Consumption of Cotton(Combined for Mills and Non Mills)

· ·	
Years	Consumption
2000-2001	160.33
2005-2006	219.00
2010-2011	275.00
2011-2012	254.18
2012-2013	283.16
2013-2014	298.88
2014-2015	320.00
2015-2016	315.28
2016-2017	310.40
2017-2018	315.00
2018-2019	311.21
2019-2020	269.19
2020-2021	334.87
2021-2022	326.00 (P)

P = Provisional

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Import of Cotton - Why Cotton Imports?

Even after being the largest producer of cotton in the world, India continues to import about 20 lakh to 30 lakh bales of cotton annually mainly from countries like the U.S.A, Australia, Brazil, Egypt and African countries. However, the imports are mostly of specific varieties and Extra Long Staple (ELS) variety to meet the deficit of such varieties of cotton due to lower production in the country and increase in domestic demand of such varieties from year to year. Further, at times it is economically viable to import (ELS) cotton instead of sourcing it domestically. With regard to ELS variety, there has been a qualitative and quantitative gap in this category.

The import of cotton by India during the period 2000-2001 to 2021-22 is given in Table 3.

Table 3: Import of Cotton

(In lakh bales of 170 kgs each)

Years	Import					
2000-2001	25.00					
2005-2006	4.00					
2010-2011	5.00					
2011-2012	12.00					
2012-2013	14.59					
2013-2014	10.80					
2014-2015	8.00					
2015-2016	22.79					
2016-2017	30.94					
2017-2018	31.00					
2018-2019	35.37					
2019-2020	15.50					
2020-2021	11.03					
2021-2022 (P)	20.00					

P = Provisional

It will be seen from the data given above that cotton import was highest in the year 2016-17, 2017-18 and 2018-19 of 31 lakh bales, and above because of low production of cotton in the year, 2016-17.

Export of Cotton:

India became a net exporter of cotton from an importer of cotton after the year 2003-2004. The increased production after meeting domestic consumption opened the opportunities of export of raw cotton by India. The export of cotton from India for two decades period may be seen from Table 4.

Table 4: Export of Cotton

(In lakh bales of 170 kgs. each)

Years	Export
2000-2001	1.00
2005-2006	43.00
2010-2011	55.00
2011-2012	129.59
2012-2013	101.93
2013-2014	117.92
2014-2015	70.00
2015-2016	69.07
2016-2017	58.21
2017-2018	44.00
2018-2019	43.55
2019-2020	47.04
2020-2021	77.59
2021-2022 (P)	40.00 (E)

E = Estimated by COCPC

P = Provisional

Growth in Exports:

In the publication brought out by the Cotton Association of India (CAI), during the Cotton India International conference in March, 2019, it is worth mentioning the following observations in the article, "Cotton Trade: Many Challenges, But Prospects are Bright", by Shri. Shyam Makharia, Managing Partner, Shykam Exim LLP, with regard to export of cotton from India. "It may be recalled that India had stunned observers by exporting 12.9 million bales of cotton in the year 2011-12. The trend of India exporting more than 10 million bales of cotton continued for the next two years also that is 2012-13 and 2013-14. In the year 2013-14, we exported 11.7 million bales. However, thereafter that is from the year 2014-15, there has been a downward trend in export of cotton from India, that is only about 7 million bales. Nevertheless, India's export prospects appeared to be favourable but steady even during that period.

In a recent article "Envisioning the Cotton Revolution in India", by Dr. Siddhartha Rajagopal, Executive Director, Cotton Textile Export Promotion Council (Texprocil), which appeared in Cotton Association of India's weekly publication (dated 17th May, 2022), the following observations about export growth deserve mention: "Over the years, India has registered a consistent growth trend with

the country's exports of cotton to the world growing at a CAGR of 33 per cent from a level of USD 48 million in 2001/02 to USD 1,897 million in 2020/21, thereby reflecting India's inherent strength and competitive advantage in cotton."

From the details presented in the foregoing pages, it will be seen that Indian cotton has come a long way since the year 2000. There has been good progress in terms of production, yield, quality etc. with the introduction of Bt. seed technology and the launching of the Technology Mission on Cotton. Incidentally, the textile industry has been pressing the Government from time to time to launch the 2nd Technology Mission on Cotton to make further progress in the cotton sector.

Conclusion: Shri Piyush Goyal, the Minister of Textiles, recently announced the formation of "Cotton Council of India" on lines of the US based "Cotton Council International" under the Chairmanship of Shri. Suresh Kotak a veteran, known as 'Bhisma Pitamah' of Cotton. The Council will work on a "robust action plan to bring about a tangible improvement in the cotton field", the Minister said. The council will also examine the important issue of low cotton productivity which is the biggest challenge, resulting thereby low cotton production, despite the country having largest area under cotton cultivation.

(The views expressed in this column are of the authors and not that of Cotton Association of India)

All India Weather Summary and Forecast

Weather Warning during next 5 days

12 July (Day 1): ♦ Heavy to very heavy rainfall at a few places with extremely heavy falls at isolated places very likely over Gujarat Region and Konkan & Goa; Heavy to very heavy rainfall with extremely heavy falls at isolated places over Vidarbha, Madhya Maharashtra and Telangana; heavy to very heavy rainfall at isolated places over Madhya Pradesh, Chhattisgarh, Saurashtra & Kutch, Marathwada, Coastal Karnataka and South Interior Karnataka and heavy rainfall at isolated places over Himachal Pradesh, Uttrakhand, Rajasthan, Odisha, Andaman & Nicobar Islands, Assam & Meghalaya, Nagaland, Manipur, Meghalaya & Tripura, Coastal Andhra Pradesh & Yanam, North Interior Karnataka, Tamil Nadu, Puducherry & Karaikal and Kerala & Mahe.

13 July (Day 2): ♦ Heavy to very heavy rainfall at a few places with extremely heavy falls at isolated places very likely over Gujarat region and Konkan & Goa; Heavy to very heavy rainfall with extremely heavy falls at isolated places over Madhya Maharashtra; heavy to very heavy rainfall at isolated places over West Madhya Pradesh, Vidarbha, Saurashtra & Kutch, Telangana, Coastal Karnataka, South Interior Karnataka and Kerala & Mahe and heavy rainfall at isolated places over Himachal Pradesh, Uttrakhand, Punjab, Haryana, Chandigarh & Delhi, Rajasthan, East Madhya Pradesh, Chhattisgarh, Odisha, Andaman & Nicobar Islands, Assam & Meghalaya, Nagaland, Manipur, Meghalaya & Tripura, Marathwada, Coastal Andhra Pradesh & Yanam and North Interior Karnataka.

14 July (Day 3): ♦ Heavy to very heavy rainfall with extremely heavy falls likely at isolated places over Gujarat State, Madhya Maharashtra and Konkan & Goa; heavy to very heavy rainfall at isolated places over Odisha, Coastal Andhra Pradesh & Yanam and Kerala & Mahe and heavy rainfall at isolated places over Himachal Pradesh, Punjab, Haryana, Chandigarh & Delhi, West Rajasthan, East Rajasthan, West Madhya Pradesh, East Madhya Pradesh, Vidarbha, Chhattisgarh, Gangetic West Bengal, Assam & Meghalaya, Nagaland, Manipur, Meghalaya & Tripura, Telangana, and Karnataka.

15 July (Day 4): ♦ Heavy to very heavy rainfall with extremely heavy falls likely at isolated places over Saurashtra & Kutch; heavy to very heavy rainfall at isolated places over Chhattisgarh, Odisha, Gujarat Region, Madhya Maharashtra, Konkan & Goa and Coastal Andhra Pradesh & Yanam and heavy rainfall at isolated places over Madhya Pradesh, Vidarbha, Gangetic West Bengal, Assam & Meghalaya, Nagaland, Manipur, Meghalaya & Tipura, Telangana, Karnataka and Kerala & Mahe.

16 July (Day 5): ♦ Heavy to very heavy rainfall at isolated places over Chhattisgarh, Odisha, Gujarat State, Madhya Maharashtra, Konkan & Goa and Madhya Pradesh and heavy rainfall at isolated places over Coastal Andhra Pradesh & Yanam, Vidarbha, Jharkhand, Gangetic West Bengal, Assam & Meghalaya, Nagaland, Manipur, Meghalaya & Tripura, Telangana, Karnataka and Kerala & Mahe.

5 Day Rainfall Forecast (MORNING) 12-July-2022

Met-Sub-Division	12-Jul Today	13Jul Wed	14Jul Thu	15Jul Fri	16Jul Sat
1. Andaman & Nicobar Islands	WS	WS	FWS	FWS	FWS
2. Arunachal Pradesh	SCT	SCT	SCT	SCT	SCT
3. Assam & Meghalaya	SCT	SCT	SCT	SCT	SCT
4. N. M. M. & T.	FWS	FWS	FWS	FWS	FWS
5. S.H. West Bengal & Sikkim	SCT	SCT	SCT	SCT	SCT
6. Gangetic West Bengal	FWS	FWS	FWS	FWS	FWS
7. Odisha	FWS	FWS	WS	WS	WS
8. Jharkhand	SCT	SCT	SCT	FWS	WS
9. Bihar	ISOL	ISOL	SCT	SCT	FWS
10. East Uttar Pradesh	ISOL	ISOL	ISOL	ISOL	ISOL
11. West Uttar Pradesh	ISOL	SCT	ISOL	ISOL	ISOL
12. Uttarakhand	FWS	FWS	SCT	SCT	SCT
13. Haryana, Chd & Delhi	SCT	FWS	FWS	ISOL	ISOL
14. Punjab	SCT	FWS	WS	FWS	SCT
15. Himachal Pradesh	FWS	FWS	FWS	SCT	SCT
16. J & K and Ladakh	SCT	FWS	SCT	SCT	SCT
17. West Rajsthan	SCT	SCT	FWS	SCT	SCT
18. East Rajasthan	WS	FWS	FWS	SCT	SCT
19. West Madhya Pradesh	FWS	FWS	FWS	FWS	FWS
20. East Madhya Pradesh	FWS	FWS	FWS	FWS	WS
21. Gujarat Region	WS	WS	WS	WS	FWS
22. Saurashtra & Kutch	WS	WS	WS	WS	WS
23. Konkan & Goa	WS	WS	WS	WS	WS
24. Madhya Maharashtra	WS	WS	WS	WS	WS
25. Marathawada	WS	WS	ws	WS	WS
26. Vidharbha	WS	WS	WS	WS	WS
27. Chhattisgarh	WS	WS	WS	WS	WS
28. Coastal A. P. & Yanam	FWS	FWS	FWS	FWS	SCT
29. Telangana	WS	WS	WS	WS	WS
30. Rayalaseema	SCT	SCT	ISOL	ISOL	ISOL
31. T.N., Puducherry & Karaikal	ISOL	ISOL	ISOL	ISOL	ISOL
32. Coastal Karnataka	WS	WS	WS	WS	WS
33. North Interior Karnataka	WS	WS	WS	FWS	FWS
34. South Interior Karnataka	WS	WS	WS	FWS	FWS
35. Kerala & Mahe	WS	WS	WS	WS	WS
36. Lakshadweep	WS	WS	WS	WS	WS

% Station Reporting Rainfall

% Stations	Category	% Stations	Category
76-100		26-50	Scattered (SCT/ A Few Places)
51-75	Fairly Widespred (FWS/ Many Places)	1-25	Isolated (ISOL)
No Rain	Dry		



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					UPCOU	NTRY SP	OT RAT	ES				(R	ks./Qtl)
Standard Descriptions with Basic Grade & Staple in Millimetres based on Upper Half Mean Length [By law 66 (A) (a) (4)]							Spot Rate (Upcountry) 2021-22 Crop July 2022						
Sr. No	. Growth	Grade Standard	Grade	Staple	Micronaire	Gravimetric Trash	Strength /GPT	4th	5th	6th	7th	8th	9th
1	P/H/R	ICS-101	Fine	Below 22mm	5.0 - 7.0	4%	15	18278 (65000)	18278 (65000)	18278 (65000)	17716 (63000)	17575 (62500)	17575 (62500)
2	P/H/R (SG)	ICS-201	Fine	Below 22mm	5.0 - 7.0	4.5%	15	18475 (65700)	18475 (65700)	18475 (65700)	17912 (63700)	17772 (63200)	17772 (63200)
3	GUJ	ICS-102	Fine	22mm	4.0 - 6.0	13%	20	15747 (56000)	15607 (55500)	15607 (55500)	15044 (53500)	14904 (53000)	14904 (53000)
4	KAR	ICS-103	Fine	23mm	4.0 - 5.5	4.5%	21	17294 (61500)	17294 (61500)	17294 (61500)	17153 (61000)	17153 (61000)	17153 (61000)
5	M/M (P)	ICS-104	Fine	23mm	4.5 – 7.0	4%	22	18981 (67500)	18981 (67500)	18981 (67500)	18840 (67000)	18840 (67000)	18840 (67000)
6	P/H/R (U) (SG)	ICS-202	Fine	27mm	3.5 - 4.9	4.5%	26	23396 (83200)	23396 (83200)	22805 (81100)	22243 (79100)	22158 (78800)	22299 (79300)
7	M/M(P)/ SA/TL	ICS-105	Fine	26mm	3.0 - 3.4	4%	25	19122 (68000)	19122 (68000)	19122 (68000)	19122 (68000)	19403 (69000)	19684 (70000)
8	P/H/R(U)	ICS-105	Fine	27mm	3.5 - 4.9	4%	26	23086 (82100)	23086 (82100)	23086 (82100)	22524 (80100)	22383 (79600)	22524 (80100)
9	M/M(P)/ SA/TL/G	ICS-105	Fine	27mm	3.0 - 3.4	4%	25	19403 (69000)	19403 (69000)	19403 (69000)	19403 (69000)	19684 (70000)	19965 (71000)
10	M/M(P)/ SA/TL	ICS-105	Fine	27mm	3.5 – 4.9	3.5%	26	21652 (77000)	21652 (77000)	21371 (76000)	21231 (75500)	21231 (75500)	21371 (76000)
11	P/H/R(U)	ICS-105	Fine	28mm	3.5 - 4.9	4%	27	24746 (88000)	24746 (88000)	24746 (88000)	24183 (86000)	24099 (85700)	24239 (86200)
12	M/M(P)	ICS-105	Fine	28mm	3.7 - 4.5	3.5%	27	24886 (88500)	24605 (87500)	24183 (86000)	23902 (85000)	23902 (85000)	23902 (85000)
13	SA/TL/K	ICS-105	Fine	28mm	3.7 - 4.5	3.5%	27	24942 (88700)	24661 (87700)	24239 (86200)	23958 (85200)	23958 (85200)	23958 (85200)
14	GUJ	ICS-105	Fine	28mm	3.7 - 4.5	3%	27	25449 (90500)	25167 (89500)	24746 (88000)	24324 (86500)	24324 (86500)	24324 (86500)
15	R(L)	ICS-105	Fine	29mm	3.7 - 4.5	3.5%	28	25027 (89000)	24886 (88500)	24324 (86500)	23902 (85000)	23761 (84500)	23902 (85000)
16	M/M(P)	ICS-105	Fine	29mm	3.7 - 4.5	3.5%	28	25730 (91500)	25449 (90500)	24886 (88500)	24464 (87000)	24464 (87000)	24464 (87000)
17	SA/TL/K	ICS-105	Fine	29mm	3.7 - 4.5	3%	28	25786 (91700)		24942 (88700)	24521 (87200)	24521 (87200)	24521 (87200)
18	GUJ	ICS-105	Fine	29mm	3.7 - 4.5	3%	28	26011 (92500)	25730 (91500)	25308 (90000)	24886 (88500)	24886 (88500)	24886 (88500)
19	M/M(P)	ICS-105	Fine	30mm	3.7 – 4.5	3.5%	29	26714 (95000)	26292 (93500)	25730 (91500)	25308 (90000)	25308 (90000)	25308 (90000)
20	SA/TL/K/O	ICS-105	Fine	30mm	3.7 - 4.5	3%	29	26855 (95500)	26433 (94000)	25870 (92000)	25449 (90500)	25449 (90500)	25449 (90500)
21	M/M(P)	ICS-105				3%	30	27558 (98000)	26995 (96000)	26433 (94000)	26011 (92500)	26011 (92500)	26011 (92500)
22	SA/TL/ K / TN/O	ICS-105	Fine	31mm	3.7 – 4.5	3%	30	27698 _(98500)		26573 (94500)	. ,	26152 (93000)	26152 (93000)
23	SA/TL/K/ TN/O	ICS-106				3%	31	N.A. (N.A.)	(N.A.)	N.A. (N.A.)	N.A. (N.A.)	N.A. (N.A.)	N.A. (N.A.)
24	M/M(P)	ICS-107	Fine	34mm	2.8 - 3.7	4%	33	28261 (100500)	28120 (100000)			27698 (98500)	27698 (98500)
25	K/TN	ICS-107	Fine	34mm	2.8 - 3.7	3.5%	34	29526 (105000)	29385 (104500)	29104 (103500)		28542 (101500)	28542 (101500)
26	M/M(P)	ICS-107	Fine	35mm	2.8 - 3.7	4%	35	29526 (105000)	29385 (104500)	29104 (103500)		28964 (103000)	28964 (103000)
27	K/TN	ICS-107	Fine	35mm	2.8 - 3.7	3.5%	35	30651 (109000)	30510 (108500)			29807 (106000)	29807 (106000)

(Note: Figures in bracket indicate prices in Rs./Candy)