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Cotton Exchange Building, 2nd Floor, Cotton Green, Mumbai - 400 033
Phone: 30063400 Fax: 2370 0337 Email: cai@caionline.in

www.caionline.in

Update on Cotton Identity Programs (ICAC's Cotton - Review of World Situation)

Introduction

Four major cotton identity programs strive to differentiate their cotton from generic cotton by means of applying different sets of social, environmental and economic standards in their production processes: organic cotton, Fairtrade cotton, Cotton made in Africa, and the Better Cotton Initiative. This article summarizes the main characteristics of each program and provides updated production data.

Organic Cotton

Textile Exchange defines the term "organic" as "a method of farming without the use of toxic and persistent pesticides or fertilizers, sewage sludge, irradiation or genetic engineering, and certified by an accredited independent organization. It is a system of farming that strives for a balance with nature, using methods and materials that are of low impact to the environment." Biotech seeds are banned.

The organic fiber must be segregated, labeled and processed on a cleaned out or dedicated line that is physically isolated. The processor must have a system in place to track the organic fiber as it moves through production. The cost of certification is usually born by the company that is being certified (such as a spinner or a fabric mill). In order for a product to be labeled as produced from organic cotton, cotton produced "organically" requires a certification valid for the country where the product is to be sold.

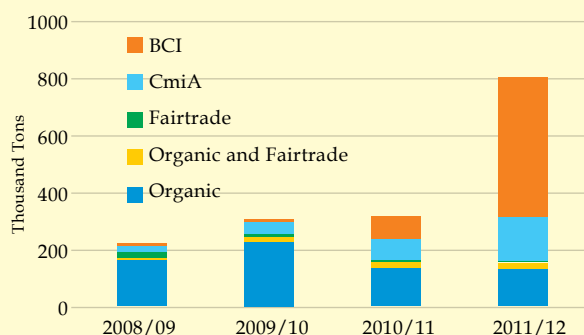


Six countries have issued government standards for organic farming production: the United States (USDA National Organic Program), Canada (Canada Organic Regime), the European Union (Nr. 834/2007), Japan (JAS), Australia (Australian Certified Organic), and India (India Organic - National Programme for Organic Production).

In 2009/10, organic cotton was grown in 23 countries by about 275,300 farmers on 461,000 hectares, with the major producers being India (195,412 tons), Syria (20,000 tons), Turkey (11,599 tons), China (4,300 tons), the United States (2,808 tons), Tanzania (2,635 tons), Uganda (1,550 tons), and Peru (831 tons) (Textile Exchange 2010). World organic cotton production amounted to 241,697 tons in 2009/10, 38% higher than in 2008/09. However, organic cotton production dropped 37% to 151,079 tons in 2010/11, driven by a 30% decline in area to 324,577 hectares (Chaudhry and Truscott 2012). India, Syria, China,

Turkey, and the United States continued to be the top five producers in 2010/11, but production in India fell by 48% from 195,412 tons to 102,452 tons due to a more stringent regulatory control by the Agricultural and Processed Food Products Export Development Authority (APEDA). Twelve out of 20 countries increased production (most significantly Benin, Brazil, Mali, Nicaragua, Kyrgyzstan and Tajikistan) and world production of organic cotton lint was projected at 143,600 tons for 2011/12. Organic cotton represents less than 1% of global cotton production.

World Production of Identity Cottons



Fairtrade Cotton

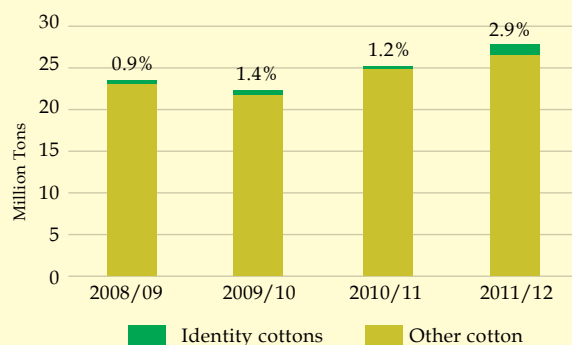
Fairtrade (FT) is promoted as an alternative approach to conventional trade and is based on a partnership between producers and consumers. FT is intended to offer producers a better deal and improved terms of trade, and consumers a way to reduce poverty through their every day shopping. FT maintains environmental standards based on the international recommendations of the UN Environment Programme, such as the strict control of chemicals and reductions in pesticides on the Pesticide Action Network's Dirty Dozen list. FT also encourages farmers to establish their own environmental development plans to ensure that where possible, waste is managed, materials are recycled, and steps are taken to avoid soil erosion and water pollution. Biotech seeds are banned, and FT cotton can also be organic.

Fairtrade International (FLO) is the umbrella organization for all Fairtrade labeling initiatives throughout the world. FLO is a non-profit, multi stakeholder body that is responsible for the strategic direction of FT, sets FT standards and supports producers. FLO adheres to the concept of physical traceability. Physical traceability means that FT products must be marked and kept separate from non-FT products at each stage of production and processing. FLO-CERT is an independent certification company, owned by FLO. FLO-CERT inspects producers and traders to ensure they comply with FT standards. In 2011, producers became half-owners of the FLO, the standards and the Fairtrade Mark, making Fairtrade's ownership model unique (Sanfilippo 2012).

The FT system is funded through license fees paid by brands and retailers who use the FT mark and by grants, on a 50%-50% basis. Grants come from various donors, private or public, and can be restricted or unrestricted. FLO does not receive government support (Sanfilippo 2011).

FT cotton production was launched in Cameroon and Burkina Faso during 2004/05, and reached the

World Cotton Production



shelves of fashion stores in Europe in March 2005. FT cotton is now also produced in India, Mali, Senegal, Brazil, Kirghizstan, Egypt, and Uganda. FT cotton producers are usually small family farms organized in cooperatives or associations, which farmers own and govern democratically. The only exceptions occur in India and Pakistan, where some cotton producing communities are not organized in cooperatives, but are selling to a Promoting Body responsible for passing back to the individual farmers the extra benefits generated by FT sales.

By selling to the FT market, cotton farmers receive: (1) a minimum price which covers the costs of production, and (2) a FT Premium which allows them to invest in community projects, such as schools, roads or health care facilities.

The FT minimum prices for cotton are set at different levels depending on the producing region, and if the market price is higher than the FT minimum price, the market price applies. Additionally, pre-export lines of credit of up to 60 % of the purchase price are given to the producer organizations on request.

Certified FT cotton production grew by 22% in 2011/12 to 24,000 tons of lint, 60% of it being also certified organic (Sanfilippo 2012). The estimated Fairtrade Premium paid to cotton producers in 2011 amounted to euro 1.1 million (FLO 2012). However, only 8,233 tons of cotton lint equivalent were sold as certified FT textile goods in 2011, 19% of them being also certified organic (FLO 2012). The other two-thirds of cotton lint produced under the FT program was either sold under FT terms but ended up in uncertified textile goods, or outside FT terms as non-FT cotton. No estimate of the amount of cotton produced under the FT program sold as non-FT is available.

In 2011, 97% of Fairtrade cotton was produced in India, Cameroon and Burkina Faso (FLO 2012). The leading markets for FT cotton are the United Kingdom ahead of France, Germany, Switzerland, the Netherlands, and Finland (Sanfilippo 2012).

In 2010/11, 58,468 smallholders produced cotton under the FT program, down from 85,000 farmers in 2009/10 and 93,000 in 2008/09 (Sanfilippo 2010, 2011).

Cotton Made in Africa

Cotton made in Africa (CmiA) is a multi-stakeholder initiative driven by the Aid by Trade Foundation (AbTF), aiming at improving the socio-economic and environmental living conditions of smallholder cotton farmers in sub-Saharan African (Kaut 2012). CmiA promotes:

- Higher income through higher productivity and improved cotton quality and better access to sales markets;
- Better working conditions through decent work on farms and in ginneries;
- Better environmental performance through optimum application of pesticides, reduction of greenhouse gases, and sound water management.

The target population of cotton growers is small-scale farmers in Africa that produce cotton in rain-fed areas and under crop rotation schemes with basic food crops. CmiA intends to promote sustainable cotton growing by specifying, measuring and monitoring indicators for the percentage of children with primary school education, efficiency of water use, fertilizer and pesticide use, and providing access to markets. Two prerequisites for CmiA cotton are: no hazardous work or child labor should be used within the cotton production chain, and cotton should not be grown on land allocated to nature by national laws. The use of biotech seeds is banned in CmiA.

CmiA intends to enhance the competitiveness of African cotton by training farmers in optimal management practices at farmer field schools, organized by local cotton companies. Furthermore, local cotton companies provide micro-credits to finance inputs and, in return, farmers commit to sell their cotton to the supporting company.

Besides farmer training and cooperation with cotton companies, CmiA's second pillar is the "demand alliance" of textiles retailers and brands that buy and integrate CmiA cotton into their global supply chains and pay back a license fee to the Aid by Trade Foundation. Retailers mark CmiA licensed pieces of garment with a woven label and a large paper tag. The targeted demand segment is price-conscious consumers interested in promoting African development through sustainable practices. This is a significant difference with Fairtrade and organic cotton, which are certification schemes designed to access niche high-end markets. The other major difference is that CmiA does not rely on a certification but on a verification system drafted at Wageningen University in the Netherlands and further developed by the consulting firm PriceWaterhouseCoopers, and each step of the supply chain (methods of cultivation,

transport, ginning, and storage of raw cotton) is verified independently, by EcoCert or AfriCert.

The CmiA project was initiated in 2005 as a public-private partnership by AbTF. The project is supported by a broad alliance of partners, coordinated by a project advisory board. The CmiA strategic alliance includes partners in industry, the public sector, the research community, and non-governmental organizations that contribute to the initiative both with their financial support and through general and technical consulting. The initiative works with 20 retailers and brands such as Puma, Otto Group, C&A, s.Oliver, Rewe, and Metro Group.

CmiA is financed mainly through donor support (GIZ and Bill and Melinda Gates Foundation), and membership fees. Only recently CmiA started promoting a fixed-volume commitment procedure for procuring cotton among retailers and manufacturers, to assure demand for CmiA cotton and to keep unit costs down.

CmiA grew from around 140,000 farmers producing 29,000 tons of cotton lint in 2008/09 to 435,000 farmers producing 163,000 tons of cotton in 2011/12. Despite its fast growth, CmiA cotton production still accounts for less than 1% of world cotton production. Zambia and Benin participate in the project since 2008/09, Malawi and Ivory Coast since 2009/10, Mozambique was integrated into the CmiA program in 2010/11; and Zimbabwe joined in November 2012. Burkina Faso participated in CmiA between 2008/09 and 2011/12. Benin was suspended from the project in January 2013 because external conditions threatened the credibility of the verification process.

Between the beginning of 2009 and the beginning of 2012, about 250,000 cotton farmers were trained in basic agricultural technologies, another 250,000 in IPM, GAP, conservation farming or harvesting technologies, and 200,000 in the proper use and storage of pesticides (Kaut 2012).

Besides the above cited difference between CmiA, and FT and organic cotton regarding the targeted demand segment, the other major difference relies on the verification methods: while FT and organic cotton are certified, CmiA does not rely on a certification but on a verification system.

Since July 1, 2012, BCI partners have been able to purchase CmiA cotton through the BCI (see below). The BCI has taken a neutral position on the use of biotech seeds, but CmiA will continue to ban biotech seeds.

The Better Cotton Initiative

The goal of the Better Cotton Initiative (BCI) is to make global cotton production better for the people who produce it, better for the environment it grows in and better for the sector's future. The

long-term objectives of BCI are to demonstrate the inherent benefits of BCI cotton production, particularly the financial profitability for farmers; to reduce the impact of water and pesticide use on human and environmental health; to improve soil health and biodiversity; to promote decent work for farming communities and cotton farm workers; to facilitate global knowledge exchange on more sustainable cotton production; and to increase the traceability along the cotton supply chain.

The BCI was launched in 2005, as a result of a global multistakeholder consultative process. The BCI operates as a not-for-profit membership association and is open to any organization involved in, or with an interest in, the cotton supply chain, and that supports the BCI's mission. As of mid-2012, BCI counted over 185 members, including associations of cotton producers (ABRAPA from Brazil, AProCA from Africa, Farmers Associates of Pakistan, and the International Federation of Agricultural Producers), retailers and brands (Adidas, Asda, Hemptex, H&M, IKEA, KappAhl, Levi Strauss & Co., Lindex, Marks & Spencer, Migros, Nike, and Sainsbury's Supermarkets Ltd.), suppliers and manufacturers (Olam, Chenab Ltd., Ecom Agroindustrial Corp, Ltd., and Sadaqat Ltd.), associate members (APTMA from Pakistan, and CottonConnect), and members from the civil society (Cotton Incorporated, Pesticide Action Network UK, Responsible Sourcing Network, Solidaridad, and the World Wildlife Fund). Suppliers and manufacturers account for 75% of total members, and 79% of all members are located in Asia (BCI 2012a). BCI's head office is in Geneva, Switzerland, with regional offices in Brazil, China, India, Mali and Pakistan.

The BCI is not about creating a premium product to attract a higher market price. Rather, the focus is on reducing costs at farm level (and therefore increasing farmers' profits) through better management practices and reduced input use. Participating farmers must meet the Minimum Production Criteria, based on pesticide use, health and safety, water use, fiber quality, habitat protection, freedom of association, child labor, forced labor, and non-discrimination. Furthermore, farmers need to set up a yearly plan to improve their practices to meet all of the Production Principles. BCI cotton is not labeled, but it does involve third party monitoring and verification.

BCI is financed through membership fees (25% in 2012) and donations, mainly from IDH, the Rabobank Foundation and ICCO (Switzerland).

One major difference between BCI and the other three initiatives described in this article is that while biotech seeds are banned from the latter, BCI is biotech-neutral.

The BCI supply chain segregates BCI from other cotton up to the gin level. BCI cotton embraces

"mass balance administration", which means that retailers or brands can buy credits for a certain tonnage of BCI cotton against the tonnage sold at retail. Retailers who want lot-by-lot track and trace ("mass balance physical"), can do it at their own cost. Despite being a non-labeled product, some traders indicate that BCI is traded at a premium over conventional cotton. That premium is market driven and not regulated by BCI.

During the start-up implementation phase, the BCI has focused on Brazil, India, Pakistan and Mali. In 2010/11, 28,500 farmers participated in BCI and harvested 75,000 tons of cotton. In 2011/12, the number of farmers in India, Mali and Pakistan increased to 90,000 and they harvested 182,000 tons of cotton, but 100 producers in Brazil brought total BCI production to 492,000 tons (BCI 2012b).

During the course of 2009, a group of private and public players developed a program to speed up the implementation of the BCI strategy: the Better Cotton Fast Track Program (BCFTP). The BCFTP Fund was established to facilitate initiatives of retailers, brands, traders and other actors in the cotton supply chain to support BC production. The Fund, founded by BCI, Ecom, ICCO, IDH, IKEA, H&M, Levi Strauss & Co., M&S, Rabobank, Solidaridad, and the WWF, matches up to 1:1 the monetary and in-kind contribution of the private sector to the project(s). After starting projects in Pakistan, India, Mali, Mozambique and Brazil, the BCFTP has expanded into China in 2012. BCFTP has established the goal of working with a million farmers to produce a million tons of BCI lint by 2015, of which the participants aspire to buy half.

ICAC Task Force on Cotton Identity Programs

At the instruction of the 71st Plenary Meeting of ICAC, the 522nd Meeting of the Standing Committee established a Task Force on Cotton Identity Programs. The objectives of the Task Force are: (1) to serve as an objective statistical observer of the cotton identity programs, enhancing transparency; (2) to serve as a clearinghouse for technical information on identity cottons; (3) to serve as a forum for exchange of experiences with cotton identity programs; and (4) to promote institutional cooperation between cotton identity programs, ICAC member countries, and other institutions of the cotton value chain.

Cotton Identity Programs were defined by the Advisory Committee as those programs that support or promote "various cotton production initiatives, including organic, Fairtrade, Cotton made in Africa, and Better Cotton Initiative."

The Task Force met for the first time on March 15, 2013 and is currently defining the work plan for the rest of the year.

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Weekly Percent Departures of Rainfall - Monsoon 2013

LEG	EXCESS	NORMAL	DEFICIENT	SCANTY	NO RAIN	
S. No.	WEEKS ENDING ON ---> MET. SUBDIVISIONS	26 JUN 2013	03 JUL 2013	10 JUL 2013	17 JUL 2013	24 JUL 2013
1.	ORISSA	53%	-63%	-42%	-8%	16%
2.	HAR. CHD & DELHI	-89%	-64%	-7%	-67%	-25%
3.	PUNJAB	-67%	-14%	4%	-73%	-5%
4.	WEST RAJASTHAN	-90%	-78%	-19%	-53%	-4%
	EAST RAJASTHAN	-31%	1%	60%	13%	23%
5.	WEST MADHYA PRADESH	50%	107%	40%	58%	25%
	EAST MADHYA PRADESH	58%	185%	-42%	30%	10%
6.	GUJARAT REGION	-73%	-78%	37%	85%	23%
7.	MADHYA MAHARASHTRA	-9%	-46%	-18%	44%	91%
	MARATHWADA	27%	-27%	18%	119%	175%
	VIDARBHA	122%	-40%	-12%	116%	136%
8.	COASTAL ANDHRA PRADESH	-7%	-77%	43%	78%	1%
	TELANGANA	5%	-59%	8%	116%	191%
	RAYALASEEMA	-33%	-69%	56%	29%	-12%
9.	TAMILNADU & PONDICHERRY	56%	38%	-21%	-30%	-24%
10.	COASTAL KARNATAKA	3%	21%	32%	-10%	29%
	N. I. KARNATAKA	-11%	-51%	-10%	62%	76%
	S. I. KARNATAKA	32%	0%	21%	0%	88%

Note: Rainfall Statistics given above is based on real time data receipt and is subject to be updated
(Source: India Meteorological Department)



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Update on Cotton Acreage (as on 25.07.2013)

Sl. No	States	Normal of Year*	Normal on Week**	Area Sown (During the corresponding week in)	
				2013	2012
1	2	3	4	5	6
1	Andhra Pradesh	20.09	15.12	17.51	16.14
2	Gujarat	26.97	22.42	25.68	19.83
3	Haryana	5.82	5.19	5.56	5.15
4	Karnataka	5.28	2.48	3.37	1.83
5	Madhya Pradesh	6.55	5.93	6.16	5.97
6	Maharashtra	40.71	37.85	37.37	38.77
7	Orissa	0.98	0.83	1.11	1.03
8	Punjab	5.24	5.50	5.05	5.16
9	Rajasthan	4.18	3.27	2.89	3.00
10	Tamil Nadu	1.28	0.09	0.03	0.06
11	Uttar Pradesh	0	0.25	0.23	0.30
12	West Bengal	0	0	0	0
13	Others	0.43	0	0.10	0
Total		117.53	98.93	105.06	97.24

* Normal area mentioned above is average of last three years (Source: Directorate of Cotton Development, Mumbai) ** It is average of last three years




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Fax: (91-22) 2209 2142
Email: pankajkotak@kotakgroup.com



Gu.RATHAKRISHNA
DIRECTOR
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K.G.RAJKUMAR
MANAGING DIRECTOR
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UPCOUNTRY SPOT RATES							(Rs./Qtl)					
Standard Descriptions with Basic Grade & Staple in Millimetres based on Upper Half Mean Length [By law 66 (A) (a) (4)]							Spot Rate (Upcountry) 2012-13 Crop JULY 2013					
Sr. No.	Growth	Grade Standard	Grade	Staple	Micronaire	Strength /GPT	22nd	23rd	24th	25th	26th	27th
1	P/H/R	ICS-101	Fine	Below 22mm	5.0 - 7.0	15	10995 (39100)	10995 (39100)	10995 (39100)	10854 (38600)	10854 (38600)	10939 (38900)
2	P/H/R	ICS-201	Fine	Below 22mm	5.0 - 7.0	15	11276 (40100)	11276 (40100)	11276 (40100)	11135 (39600)	11135 (39600)	11220 (39900)
3	GUJ	ICS-102	Fine	22mm	4.0 - 6.0	20	8070 (28700)	8014 (28500)	7958 (28300)	7874 (28000)	7874 (28000)	7817 (27800)
4	KAR	ICS-103	Fine	23mm	4.0 - 5.5	21	9392 (33400)	9392 (33400)	9364 (33300)	9308 (33100)	9308 (33100)	9280 (33000)
5	M/M	ICS-104	Fine	24mm	4.0 - 5.5	23	10686 (38000)	10686 (38000)	10629 (37800)	10573 (37600)	10573 (37600)	10545 (37500)
6	P/H/R	ICS-202	Fine	26mm	3.5 - 4.9	26	11670 (41500)	11614 (41300)	11614 (41300)	11585 (41200)	11529 (41000)	11501 (40900)
7	M/M/A	ICS-105	Fine	26mm	3.0 - 3.4	25	11023 (39200)	11164 (39700)	11164 (39700)	11220 (39900)	11304 (40200)	11304 (40200)
8	M/M/A	ICS-105	Fine	26mm	3.5 - 4.9	25	11304 (40200)	11445 (40700)	11445 (40700)	11501 (40900)	11557 (41100)	11557 (41100)
9	P/H/R	ICS-105	Fine	27mm	3.5 - 4.9	26	11867 (42200)	11838 (42100)	11838 (42100)	11810 (42000)	11754 (41800)	11726 (41700)
10	M/M/A	ICS-105	Fine	27mm	3.0 - 3.4	26	11389 (40500)	11445 (40700)	11445 (40700)	11501 (40900)	11585 (41200)	11585 (41200)
11	M/M/A	ICS-105	Fine	27mm	3.5 - 4.9	26	11670 (41500)	11726 (41700)	11726 (41700)	11782 (41900)	11838 (42100)	11838 (42100)
12	P/H/R	ICS-105	Fine	28mm	3.5 - 4.9	27	11979 (42600)	11979 (42600)	11979 (42600)	11951 (42500)	11895 (42300)	11867 (42200)
13	M/M/A	ICS-105	Fine	28mm	3.5 - 4.9	27	11810 (42000)	11810 (42000)	11810 (42000)	11810 (42000)	11810 (42000)	11810 (42000)
14	GUJ	ICS-105	Fine	28mm	3.5 - 4.9	27	11838 (42100)	11838 (42100)	11810 (42000)	11782 (41900)	11754 (41800)	11754 (41800)
15	M/M/A/K	ICS-105	Fine	29mm	3.5 - 4.9	28	11951 (42500)	11951 (42500)	11923 (42400)	11923 (42400)	11923 (42400)	11923 (42400)
16	GUJ	ICS-105	Fine	29mm	3.5 - 4.9	28	11979 (42600)	11979 (42600)	11951 (42500)	11923 (42400)	11867 (42200)	11867 (42200)
17	M/M/A/K	ICS-105	Fine	30mm	3.5 - 4.9	29	12120 (43100)	12120 (43100)	12092 (43000)	12092 (43000)	12092 (43000)	12092 (43000)
18	M/M/A/ K/T/O	ICS-105	Fine	31mm	3.5 - 4.9	30	12204 (43400)	12204 (43400)	12148 (43200)	12148 (43200)	12148 (43200)	12148 (43200)
19	K/A/ T/O	ICS-106	Fine	32mm	3.5 - 4.9	31	12485 (44400)	12485 (44400)	12429 (44200)	12429 (44200)	12429 (44200)	12429 (44200)
20	M(P)/K/T	ICS-107	Fine	34mm	3.0 - 3.8	33	14763 (52500)	14763 (52500)	14763 (52500)	14679 (52200)	14622 (52000)	14622 (52000)

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