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## Ethiopian Cotton -Textile Value Chain Development 2011-2015

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Forum (SEACF) Symposium, 17-18 June 2014. Maputo, Mozambique*

### Introduction

The Growth and Transformation Plan (GTP) of Ethiopia considers the development of textile industries among others and gives special attention and growing significance to enhancing export revenues by means of substantial investments in value addition. Production of textile and apparel is expected to reach up to \$2.5 billion, of which \$1 billion would come from increased exports by the final year of the GTP.

Given the encouraging growth in the textile and apparel sector and value addition of the locally produced lint cotton, Ethiopia's Ministry of Agriculture designed a "cotton development and marketing strategy" at the beginning of the GTP period in order to satisfy the growing demand of the textile industries.

This strategy plans for a fivefold area expansion and lint production. Moreover it requires facilitating greater involvement of the private sector, making new investments and upgrading ginning technologies, enhancing the capacity of support organizations, building linkages, matchmaking activities, providing market information,

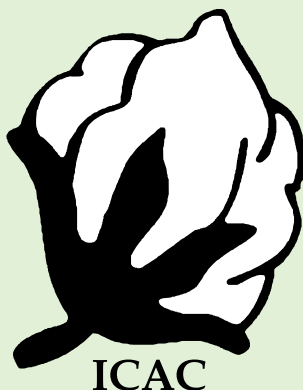
standardization and grading of raw and lint cotton, implanting testing and marketing facilities, facilitating access to inputs and finance, reducing contamination and improving productivity through research and training.

Nonetheless, the cotton-to-textile sector faces significant challenges in fulfilling these goals. Therefore, it is important to evaluate the performance of the sector, to make the necessary analysis of the challenges and opportunities, to efficiently utilize the time ahead and so to achieve the GTP objectives.

### Materials and Methods

The evaluation was performed by a team of experts from the Textile Industries Development Institute, Ethiopian Institute of Agricultural Research, Ministry of Agriculture, Ethiopian Commodity Exchange and Ethiopian Cotton Producers Ginners and Exporters Association by the initiative of Ministry of Agriculture. The major evaluation criteria were

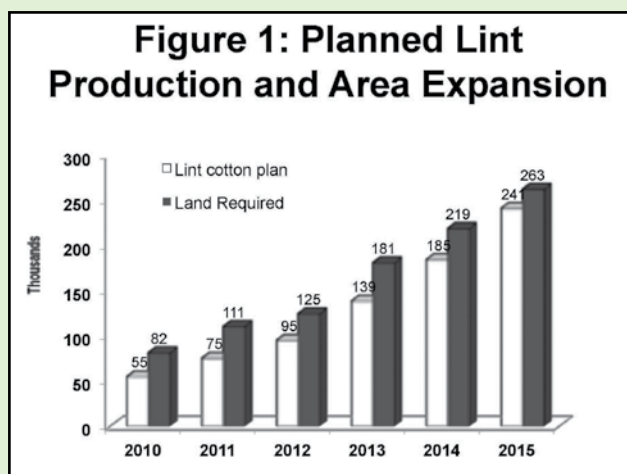
export performance, demand and supply trends, yarn production, lint production and consumption, cotton area coverage and performance of land development. The primary documents of this study



were the GTP of the country, the GTP of the Textile Industries Development Institute and the cotton development and marketing strategy of Ministry of Agriculture (2011-2015). Data on the performance of each criterion were provided by the representatives of each institution participating in the study group. Comparisons were made between the GTP and performance, production and consumption and individual performances of the major value chain actors. Data management, analysis, discussions, recommendations and conclusions of this paper were made by the author.

### Area and Production Increase

The GTP of the Ministry of Agriculture foresees a threefold and, under favorable conditions, up to fivefold increase in area and production of lint cotton considering the projected demand of existing and newly installed textile factories, the use of additional lint cotton to encourage more textile factories, competition of other high value crops and any contingencies (Fig. 1).

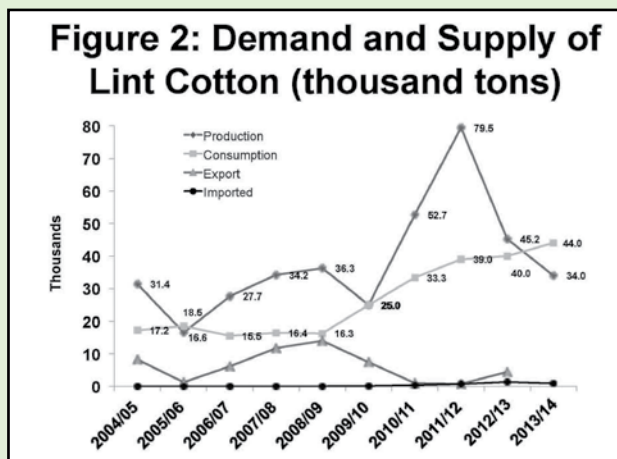


The area planted under cotton expanded in 2011/12 from 82,000 to 112,000 hectares, an increase of 47%. However, a drastic decrease in area followed in 2012/13 and 2013/14, falling to 78,000 and 55,000 hectares, respectively. In addition to the existing cotton farms, the Ministry of Agriculture gave more than 103,000 hectares of new land to investors where less than five percent of the land had been prepared for agriculture, such as clearing of trees and bushes or opening canals for irrigation. More land has been also given to the textile industries to produce more lint and satisfy their increasing demand.

### Cotton and Its Strategic Significance

In order to make the plan effective and increase the competitiveness of the sector, sustainable sourcing of raw material is a priority. Lint production more than doubled in 2011/12, growing from 36,000 to 79,500 tons. Additionally, nearly all of the lint produced was consumed domestically and

value was further added by the textile industry's consumption. This is in contrast to 2004-2009 when approximately 50% of lint production as exported (Fig. 2).



### Lint Cotton Production and Consumption

The performance of both cotton production and consumption indicates that the sector is suffering from an unstable demand and supply gap, with marketing and financial consequences. The effect has been more pronounced on the lint production side. Lint production in the 2011 cropping season showed an encouraging increase, but was followed by a sharp fall in the following year, while consumption has continued to increase moderately. Independent evaluation of the two seasons' average GTP performance of both production and consumption indicates growth was 73% and 54%, respectively. Very low lint consumption by the textile industries and a marketing failure in the 2011 and 2012 production years greatly contributed to the significant reduction in the performance of lint production in 2012 and 2013. As a result, the production of 45,200 tons of lint achieved during the 2012 cropping season did not meet the forecast production target and reduced the planned demand from 116,800 to 65,800 tons. Actual consumption was only 39,000 in 2012/13 (Fig. 2). These significant improvements in the Ethiopian cotton to textile sector indicate the upcoming challenges and changes of dynamics and trends of production and consumption, with demand from the textile and garment industries increasing moderately but steadily.

Demand is rising because the annual spinning capacity of the industry increased from 25,000 to 111,000 tons of lint. Furthermore, with the establishment and opening of new textile factories, the transition from lint exporter to exporter of finished products has been achieved. This indicates the increasing strategic importance of the cotton

crop and the level of attention and support required, accordingly.

DESCRIPTION	ANNUAL PRODUCTION CAPACITY (as of 2013)
YARN	37 kilograms
WOVEN FABRIC	88 meters
KNITTED FABRIC	30 kilograms
WOVEN GARMENT	18 pieces
KNITTED GARMENT	62 pieces

## Export Performance

The overall export performance of the textile and garment sector for the evaluation period started with a significant annual growth rate of 168% during 2010/11, followed by increases of 36% and 17% in the next two seasons. The contribution of fabric and apparel export reached 400%. The performance of individual export items differs significantly. Yarn export performance increased by 258% during 2012/13. Apparel exports increased by 235% and were the most important contributor to export performance during 2011/12. The share of handloom sector also grew significantly and its performance improved by 100% during 2010/11 (Table 2).

Product Types	Budget year (USD million)							
	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
Yarn	-	-	-	3,7	8,5	9,1	8,9	23
Fabric	4,2	4,4	4,6	3,7	6,3	22,9	8,3	10
Apparel	6,9	8	9,7	6,6	6,7	26,7	63,1	61
Handloom products	0,1	0,2	0,4	0,4	1,7	3,4	4,4	5
Total	11,1	12,6	14,6	14,4	23,2	62,2	84,6	99
Annual growth Rate (%)	64,3	13,7	15,8	-1,2	60,8	168,1	36	17



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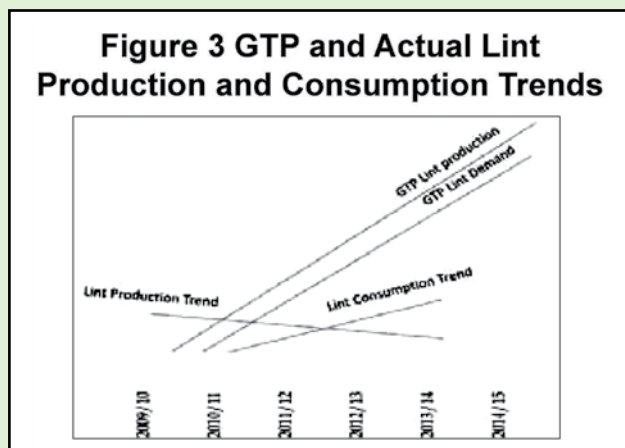
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Even though the spinning capacity of the textile industries rose by 136%, the increase of yarn production over the GTP period, that is 2011 and 2012, was only 57% and 51%, respectively. A similar performance has been reported for lint consumption (Fig 3).



Therefore, strong institutional support of the cotton-to-textile sector is required since there are fluctuations of production and consumption of lint cotton, which significantly affects the sector's competitiveness and sustainability.

### Gins

More than half of the gins in Ethiopia are located far from cotton growing areas. Raw cotton has to be transported more than 700km to reach the gins, adding costs to cotton producers and up through the value chain. Upgrading of ginning technologies with cleaning facilities and timely maintenance to reduce contamination and preserve the inherent characteristics of fiber is essential. Clusters (producers' organizations) of each cotton region need to be strengthened to increase the geographic distribution of gins. Gins could also serve as centers of information management of both raw and lint cotton.

### Fiber Quality

Fiber quality data collected and analyzed by the Textile Industries Development Institute indicate that there is significant contamination from polypropylene and honeydew.

Data and information on type, level and regional variations, including extraneous contaminants, are very important to devise appropriate control measures to satisfy and avoid claims while encouraging growers with premium prices. The adoption of new national standards (CES 36:2013), which are based on international standards, will make an important contribution to regulating the marketing performance of the sector.

### Improved Varieties and Quality Seeds

Today's high speed spinning technology requires stronger staple fiber, a narrower fineness

range, higher uniformity level and minimum neps content with a very low contamination level. Limited availability of cotton varieties for different agro-ecologies, lack of pure pre-basic seed, multiplication and distribution channels are factors that significantly affect cotton production and fiber quality.

The timing is therefore opportune to improve cotton to clothing sectors, considering the industry as the driver and cotton as a strategic crop.

- Consideration of cotton as an important strategic crop
- Enhancement of sectorial sustainability through institutional development
- Balancing the support level of the sector within the value chain
- Increase in cotton trading and marketing capabilities
- Value chain analysis and integration
- Education of farmers on quality assurance and contamination issues
- Promotion of the development of out-growers schemes

### Conclusion

The average performance of both major demand and supply value chain actors is about 60%, which is far below the objectives outlined in the GTP.

Limited local lint consumption and new area development, shrinkage of cotton area, significant fluctuations and uncertainties of the performances by major value chain actors and stakeholders are warning signs for lint cotton availability and the competitiveness of the sector.

Increasing marketing efficiencies, improving the transportation infrastructure, aggregating the modest volumes of cotton from smallholder farmers into larger volumes for marketing while at the same time maintaining quality and reducing contamination are also crucial to the efficiency and healthy growth of the sector.

Mobilizing all resources to organize research activities with respect to all aspects of cotton production, that is ginning, textiles and garmenting, and disseminating the results to value chain actors and farmers in all cotton growing areas is also important. Such research should consider all available options, including biotech cotton.

It is also very important to understand and improve the competitiveness and effective utilization of comparative advantages of the sector, participate, learn and align the national strategy with appropriate regional & international trade programs and forums such as the African Cotton

and Textiles Industries Federation, the Common Market for Eastern and Southern Africa and the ICAC.

### Recommendations

Based on the discussion above, several recommendations can be put forward to strengthen the cotton-to-textile sector. Firstly, regulatory and organizational institutions should be reinforced to facilitate greater involvement of private sector and producer organizations.

Secondly, coordinating and motivating the various stakeholders to finance large-scale mechanized cotton farms and ginneries and revamping research and extension are of critical importance.

Thirdly, increasing access to both inputs and investment finance, improving productivity through research and training, supporting market and product development and promoting diversification and innovation into products are also important objectives.

Therefore, a concerted effort of stakeholders and leading institutions is required to make the necessary analysis and prioritization of the challenges and

opportunities, to take immediate corrective actions, to make amendments to the plan for making cotton a major strategic crop and to balance the desired support to achieve the planned goal.

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*Source: COTTON: Review of the World Situation, July-August 2014.*

*Jai Shree Krishna*



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# A Hundred Years of Indian Cotton

By Professor M.L. Dantwala

## CHAPTER IV : MARKETING THEN AND NOW

"THE chief cotton marts visited during this tour were Hingunghat, Undoree, Deolee, Anjee and Arvee. Of these Hingunghat is the most extensive, and its town is, I believe, the most populous in the Wurdah district. The appearance which the 'cotton gunge' presented was most striking and quite novel to me. From a distance the enormous piles of cotton heaped up top a point resembled an encampment of tents. These occupy a clear open space outside the town; each merchant's yard having its own enclosure, inside of which is the shed, and in this shed crowds of women are occupied with the churka, separating the wool from the seed."

"The churka used here is smaller than I have elsewhere seen. The rollers both of which are made of Khair wood, and about ten inches in length, slope towards one end; the machine is worked by one person only; and a woman earns from four to five annas per day, turning out on an average from 6 to 7 lbs. of clean cotton; payment is made in coin."

"The market or weighing place, is surrounded by tiers of cotton packages; they cannot be called 'Dhokras' or bales. These packages contain the cotton which has been cleaned in the outlying villages, and which is brought in by Marwarees and others for sale on delivery to the cotton merchants. The method of packing the cotton for conveyance affords a striking illustration of the utter indifference that exists on the part of the people towards preserving their fine cotton, either from waste by the way, or from contact with dust and dirt of every description. A coarse net bag of hemp rope is the receptacle; these meshes vary from two to four, or even eight inches square, the cotton is trodden into it, and, of course, projects prominently through these meshes, and on its journey to market it is not only perfectly open to dust and moisture, but is also subject to heavy contributions by every tree, bush or twig that may happen to come in contact with it. I have repeatedly seen lumps of cotton which had been drawn in this manner strewing the road. At and around the neighbouring stand there was mixture of dust and pulverized cowdung several inches deep, over which these cotton bundles were carelessly rolled until they became of a colour that made it difficult from a little distance to say what they contained. The actual loss from waste, and the deterioration in value, caused by this careless mode of packing cannot be less than 15 to 12 per cent; yet, I fear, it will be a work of time to induce the village people to adopt any other mode of sending their

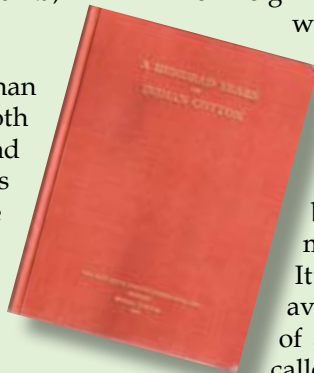
cotton to market. Something, however, might be done to obviate the damage the cotton is exposed to on the spot, by having the whole of the cotton mart laid down with shingle, or paved with round stones, as I observed done at other places. A proper weighing machine, such as that used at railway stations, would also be an improvement upon the present primitive article, which consists of a rough beam suspended by a rope with a hook at one end and a basket at the other, stones being used as weights. This article not only gives rise to great waste of time in the operation of weighing, but it was said on the spot that the men who were employed on this duty had it in their power to favour the buyer or the seller to the extent of half a maund or more on each package."

"Cotton here was brought and sold by the 'Boja' of twelve maunds, each maund of ten and a half seers (or 21 lbs.). It was mostly being sent to Mulkapore. An average cart-load was five bojias, and a hire of a cart was 45 rupees. The dokra here is called 'Uka'; two go to a boja; and each, as packed for the Bombay market, weighs about 137 lbs. Gunny bags are used for this final packing here, as elsewhere; but the operation was carelessly performed, and the seams of the bags were left so open that in the transit cotton might be abstracted and rubbish introduced without difficulty."

"The two chief wants of this great cotton mart are, first, the means of cleaning cotton expeditiously by machinery instead of the churka, and secondly, some arrangement for better packing for cart transit."

The above lengthy extract is from a Memorandum, dated, 14th January 1865, on the cotton fields of Nagpur by Mr. Forbes, who was then the Cotton Commissioner for Bombay. Much water has flowed under the bridge since this was written. Yet the description is not without points of similarity with the present.

The years which have rolled by have brought in many changes. High-powered steam and electric engines have replaced the bullock and the bullock-cart for long-distance transport. The 'native churkha' is to be found only in pictures. Mechanical gins do the work of separating seed from kapas, and hydraulic presses that of compressing 392 lbs. of lint into a bale. The radio and the telephone flash the prices in the central markets to the remotest villages. The Kulle system of storage is abolished.





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## Let us have a look at the marketing of to-day.

Cotton is grown in thousands of India's scattered villages. Conditions vary so much from province to province that it is impossible to give a general description of cotton marketing. A passage from a book on the subject may, however, give some idea of the process.

"The farmer disposes of his cotton either in the village itself or takes it to some adjoining market. Sales in villages appear to be more favoured. The purchaser in the village is either a petty local merchant or itinerant trader or a dalal. Occasionally some big Bombay firms, having their offices in town markets in the mofussil, send their agents into adjoining villages to accumulate a sufficient quantity of cotton. All these together make the demand side fairly competitive, and the prices in villages compare favourably with those in primary markets. In Gujarat, the gin-owners, who often are themselves cotton merchants, send their representatives to villages to purchase cotton directly from the cultivators. The money-lenders, though they advance money to the cultivators, seldom purchase their crop."

"Besides these direct transactions, a system of forward sales prevails in some districts, the price being either fixed at the time of the contract or left to be fixed at the option of the seller. In Central Gujarat – Broach, Panch Mahal and Baroda State – the gin-owners arrange with the cultivators, at the commencement of the harvesting season to purchase their approximate crop at a particular price on the basis of samples. As the crop is harvested, the farmer delivers his cotton directly at the ginneries for weighment. Sales by auction are not frequent."

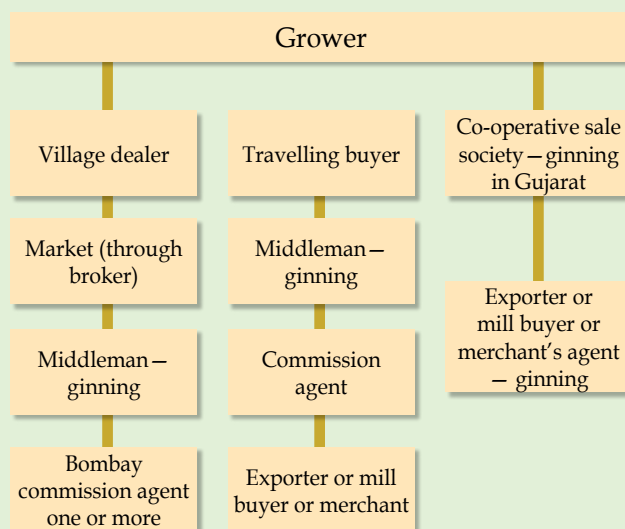
"In villages the transactions are done leisurely at any hour of the day. But in town markets the carts assemble at some fixed place mostly in the early morning. In some districts the compound of a ginning factory serves as a cotton market. In Khandesh and the Karnataksome municipalities, e.g. those of Jalgaon and of Hubli provide open spaces for the purpose of the cotton market. In Dhulia, the biggest market of West Khandesh, prior to the establishment of a regulated market, and even afterwards, two ginning factories allowed the use of their land gratis for the purpose."

"Merchants and brokers begin to assemble in the market place from early morning. By the time, they come, most of them are telegraphically informed both about Bombay's closing rates the night before and the latest American Futures. Soon after begins a process of noisy bargaining between buyers and sellers, but more often between their respective dalals and adatiyas. Dalals move about with samples from the carts of their clients, showing them to prospective buyers. Bids are made under cover of a piece of cloth by a peculiar code of fingers."

"The first price that is agreed upon by any two parties is taken as the ruling price for the day, allowance being made for the difference in quality. Within an hour or so, the whole market yard is cleared, with none but a few stray cattle grazing unconcernedly."

"The carts go to the ginneries, where the cotton is weighed. At some places the Co-operative Society provides a weigh-bridge. (There is a confusing variation in the weights used in different markets.) After the weight is recorded, the kapas is heaped on the bare ground, to await its turn for ginning. A few factories now-a-days provide godown facilities. By evening the cultivator usually gets his payment, and returns to his village, after making some purchases in the town or indulging at an ale-house."

The Bombay Provincial Banking Enquiry Committee (1930) give the following diagram indicating the channels through which cotton usually passes from the grower to the mill-buyer or the exporter: –



But they also remark that "variations are numerous and the number of middlemen is sometimes larger."

As mentioned above, the bulk of the crop is sold in the village itself. In 1928, the Indian Central Cotton Committee conducted an investigation into the financing and marketing of cotton in various cotton growing districts of India. Their investigations showed that the cultivators displayed a clear preference for selling their crop in their own village. This was mainly due to the fact that "the rates in the village compare very favourably with the prevailing market rates" in nearby towns. That cotton merchants, representatives of spinning mills, and even exporters go to the remote villages of India in search of cotton suggests the existence of a lively competition in the trade.

*To be continued...*



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## PRODUCTION OF MAN-MADE FILAMENT YARN

(In Mn. Kgs.)

Month	Viscose Filament yarn	Polyester Filament yarn	Nylon Filament yarn	Poly propylene Filament yarn	Total
<b>2012-13 (P)</b>					
April	3.45	113.68	2.10	1.97	121.20
May	3.65	113.10	1.95	1.70	120.40
June	3.35	107.25	1.75	1.78	114.13
July	3.65	115.11	1.85	1.36	121.97
August	3.65	120.75	2.00	1.68	128.08
September	3.55	111.64	1.95	1.35	118.49
October	3.65	108.10	1.98	1.28	115.01
November	3.50	98.46	1.75	1.16	104.87
December	3.69	104.76	1.88	1.30	111.63
January	3.70	107.55	2.00	1.26	114.51
February	3.31	95.10	1.85	1.10	101.36
March	3.63	92.30	1.97	1.32	99.22
<b>2013-14 (P)</b>					
April	3.51	103.27	1.59	1.36	109.73
May	3.38	108.65	1.87	0.90	114.80
Jun	3.58	105.95	1.82	0.99	112.34
Jul	3.92	99.07	1.91	1.11	106.01
Aug	3.86	106.47	1.98	1.30	113.61
Sept.	3.72	102.65	1.94	1.03	109.34
Oct.	3.77	97.03	1.90	0.83	103.53
Nov.	3.46	93.13	1.88	1.14	99.61
Dec.	3.75	103.81	2.05	1.16	110.77
Jan.	3.72	103.11	2.37	1.14	110.34
Feb.	3.54	91.57	2.25	1.06	98.42
Mar.	3.78	98.36	2.44	0.89	105.47
<b>2014-15 (P)</b>					
April	3.74	94.92	2.30	1.12	102.08
May	3.70	100.28	2.63	1.00	107.61
June	3.63	102.29	2.20	1.01	109.13
July	3.63	107.64	2.38	1.12	114.77

P - Provisional

Source : Office of the Textile Commissioner



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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) 2013-14 Crop SEPTEMBER 2014					
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	10404 (37000)	10404 (37000)	10404 (37000)	10404 (37000)	10404 (37000)	10404 (37000)
2	P/H/R	ICS-201	Fine	Below 22mm	5.0-7.0	15	10545 (37500)	10545 (37500)	10545 (37500)	10545 (37500)	10545 (37500)	10545 (37500)
3	GUJ	ICS-102	Fine	22mm	4.0-6.0	20	7171 (25500)	7171 (25500)	7171 (25500)	7114 (25300)	7114 (25300)	7114 (25300)
4	KAR	ICS-103	Fine	23mm	4.0-5.5	21	7789 (27700)	7789 (27700)	7789 (27700)	7733 (27500)	7733 (27500)	7733 (27500)
5	M/M	ICS-104	Fine	24mm	4.0-5.0	23	9308 (33100)	9308 (33100)	9308 (33100)	9251 (32900)	9251 (32900)	9251 (32900)
6	P/H/R	ICS-202	Fine	26mm	3.5-4.9	26	10123 (36000)	10123 (36000)	10123 (36000)	10123 (36000)	10123 (36000)	10123 (36000)
7	M/M/A	ICS-105	Fine	26mm	3.0-3.4	25	8830 (31400)	8689 (30900)	8577 (30500)	8436 (30000)	8436 (30000)	8436 (30000)
8	M/M/A	ICS-105	Fine	26mm	3.5-4.9	25	9336 (33200)	9111 (32400)	8970 (31900)	8830 (31400)	8830 (31400)	8830 (31400)
9	P/H/R	ICS-105	Fine	27mm	3.5-4.9	26	10264 (36500)	10264 (36500)	10264 (36500)	10264 (36500)	10264 (36500)	10264 (36500)
10	M/M/A	ICS-105	Fine	27mm	3.0-3.4	26	9139 (32500)	8998 (32000)	8802 (31300)	8717 (31000)	8717 (31000)	8717 (31000)
11	M/M/A	ICS-105	Fine	27mm	3.5-4.9	26	9589 (34100)	9505 (33800)	9308 (33100)	9223 (32800)	9223 (32800)	9223 (32800)
12	P/H/R	ICS-105	Fine	28mm	3.5-4.9	27	10545 (37500)	10545 (37500)	10545 (37500)	10545 (37500)	10545 (37500)	10545 (37500)
13	M/M/A	ICS-105	Fine	28mm	3.5-4.9	27	10179 (36200)	10039 (35700)	9926 (35300)	9786 (34800)	9786 (34800)	9786 (34800)
14	GUJ	ICS-105	Fine	28mm	3.5-4.9	27	10320 (36700)	10039 (35700)	9926 (35300)	9786 (34800)	9786 (34800)	9786 (34800)
15	M/M/A/K	ICS-105	Fine	29mm	3.5-4.9	28	10545 (37500)	10348 (36800)	10264 (36500)	10123 (36000)	10123 (36000)	10123 (36000)
16	GUJ	ICS-105	Fine	29mm	3.5-4.9	28	10517 (37400)	10292 (36600)	10208 (36300)	10095 (35900)	10095 (35900)	10095 (35900)
17	M/M/A/K	ICS-105	Fine	30mm	3.5-4.9	29	10882 (38700)	10657 (37900)	10489 (37300)	10348 (36800)	10348 (36800)	10348 (36800)
18	M/M/A/K/T/O	ICS-105	Fine	31mm	3.5-4.9	30	11164 (39700)	10939 (38900)	10770 (38300)	10629 (37800)	10629 (37800)	10629 (37800)
19	A/K/T/O	ICS-106	Fine	32mm	3.5-4.9	31	11585 (41200)	11360 (40400)	11192 (39800)	11051 (39300)	11051 (39300)	11051 (39300)
20	M(P)/K/T	ICS-107	Fine	34mm	3.0-3.8	33	14060 (50000)	13779 (49000)	13638 (48500)	13498 (48000)	13498 (48000)	13357 (47500)

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