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**Cotton  
Association  
of India**

# COTTON STATISTICS & NEWS

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## Twists and Turns in the Indian Cotton Scenario

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### GUEST COLUMN

**Dr. M.V. Venugopalan**  
*Principal Scientist (Agronomy) and Head, PME unit  
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The history and evolution of the Indian civilization is closely linked to the domestication, cultivation and use of cotton across its diverse agro-ecological regions. Today, cotton is the most important cash crop as it sustains the rural economy, besides being a major export earner. Cotton is still the most pristine fibre and is best suited to clothe the human body in tropical climate. Cotton contributes to 50% of the clothing needs of India. About 4 million farm households cultivate cotton. The cotton industry employs around 40 million through different activities along the cotton value chain.

The quantitative and qualitative changes in the cotton production scenario of the country can best describe the story of Indian cotton. For centuries, India cultivated desi cotton (*Gossypium arboreum* and *Gossypium herbaceum*) that were short to medium staple, but our dexterous spinners and weavers could produce the finest cloth with this cotton. India ruled the world of textiles between 1200 and 1800 AD in cotton production, clothing manufacture and trade. Cotton was abundantly available and our craftsmen had adequate knowledge of processing and weaving. Despite several attempts to introduce the new world cottons, *G. Hirsutum* (American) and *G. Barbardense* (Egyptian) cotton during the colonial regime and intensive R&D efforts to acclimatise them, less than 3.0% of the total cotton area was under these cottons at the dawn of Independence.

### Drivers for Cotton Growth in the Post-Independent Era:

Post-Independence, India witnessed several technology driven changes in the type and quality of cotton available and the way cotton is produced. The area trebled from 4.24 million

ha in 1947-48 to 12.85 million ha in 2014-15, and productivity rose over five fold from 99 kg/ha in 1950-51 to 566 kg/ha in 2013-14. Together they contributed to a 12 fold increase in cotton production from 3.34 million bales (of 170 kg each) in 1947-48 to 39.8 million bales in 2013-14. While enabling policy measures, effective price support and increased off-take by domestic textile industry led to expansion of cotton area, the productivity improvement was largely due to technological breakthroughs. Development of high yielding varieties and agro chemical based production/protection technologies in the 1960s, hybrid cotton revolution in the 1970s, spread of drought tolerant, semi compact American and desi cotton varieties and pyrethroids for pest management in the 1980s, Integrated Pest Management (IPM)/ Insecticide Resistance Management (IRM) in the 1990s and introduction of transgenic Bt cotton hybrids in the first decade of this country were major breakthroughs that revolutionised cotton production. Government supported programmes like Grow More Cotton, Integrated Cotton Development Programme, Technology Mission on Cotton, Integrated Pest Management and Insecticide Resistance Management projects were also responsible for transforming the Indian cotton scenario.

#### Area, Production and Productivity of Cotton in India

Year	Area (m ha)	Production (m bales of 170 kg)	Productivity (kg/ha)
1947-48	4.24	3.34	132
1950-51	5.88	3.43	99
1960-61	7.61	5.60	125
1970-71	7.61	4.76	106
1980-81	7.82	7.01	152
1990-91	7.44	9.84	225
2000-01	8.58	14.00	278
2002-03	7.67	13.60	302
2010-11	11.14	32.50	496
2013-14	11.96	39.80	566
2014-15	12.85	38.60	511
2015-16	11.88	33.80	484

Source: Cotton Advisory Board

The introduction of Bt cotton in the year 2002 was a game changer. It changed the composition and character of India's cotton landscape in favour of the long-stapled hybrids and resulted in significant yield gains. The spread of cotton increased from 7.6 m ha in 2003-04 to 12.8 m ha in 2014-15, albeit at the expense of pulses, oilseeds and coarse cereals that are vital for our food security. Today, BG II hybrids occupy 90-95% of the cotton area. It has transformed India to becoming the world's largest cotton producer and a stable exporter. The export of raw cotton steadily increased and reached 12.96 million bales in 2011-12. The mean export of raw cotton during 2011-12 to 2015-16 was 9.5 million bales. The production of cotton seed oil increased from 0.46 million tonnes in 2002 to 1.5 million tonnes in 2013.

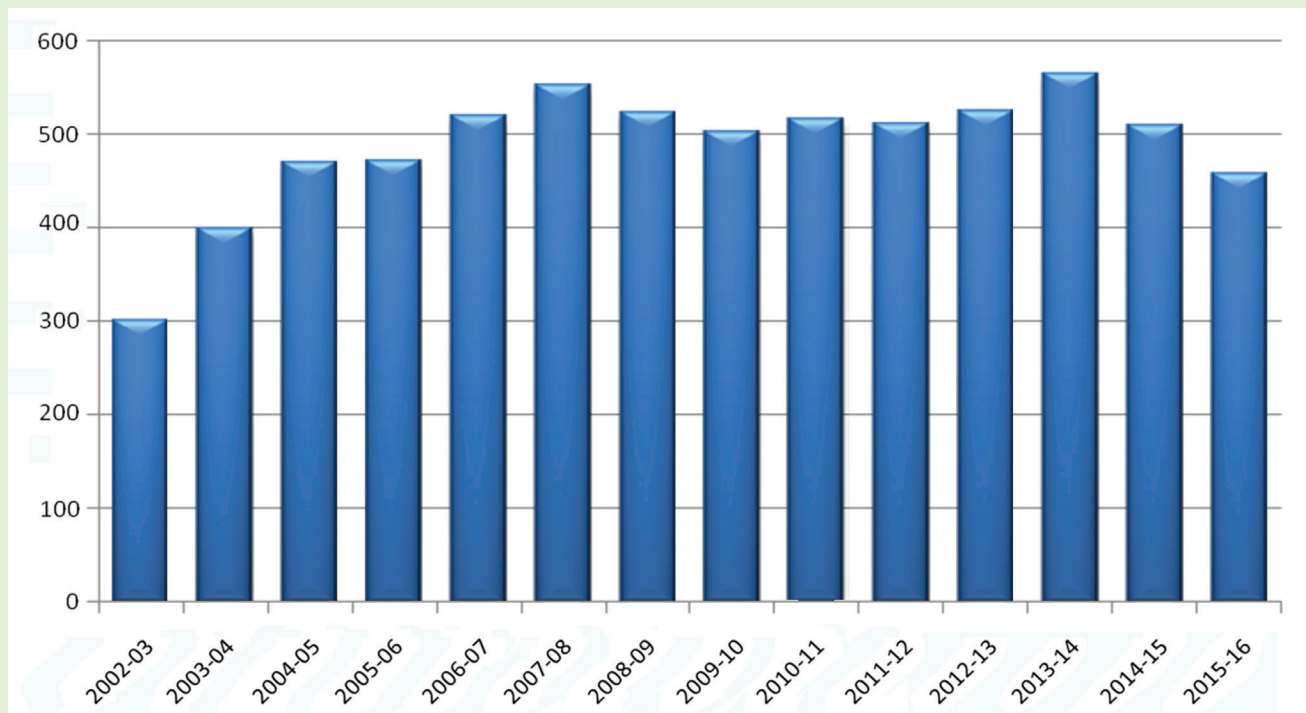
#### Qualitative Changes in Indian Cotton:

Along with the vertical and horizontal expansion in cotton production, the qualitative changes in Indian cotton was equally impressive. These changes were made to cater to the dynamic demands of the Indian textile mills. After independence, deliberate attempts were made to replace short staple desi cotton with medium and long stapled hirsutum cotton (including hybrids). The area under G. Hirsutum cotton increased from 3% in 1947-48 to 41% by 1965, further to 75% by the year 2000 and to 95% at present. The change in species composition caused significant changes in fibre quality profile. The release of *Gossypium barbadense* variety Suvin that can be spun to 120s, in 1974, revolutionised the production of extra-long staple (ELS) cotton in India. During 1947-48, 67% of our cotton was of medium staple category and the rest was short stapled. Efforts were intensified to produce long staple cottons that suited the mills. After 50 years, in 1998-99 around 69, 25 and 6% were under long, medium and short staple category respectively. The production of short staple cotton further reduced from 9-10 lakh bales in 2000 to 6 lakh bales in 2006-07 and to 4.0 lakh bales 2011-12. The large-scale adoption of Bt hybrids in the last decade caused a glut of long staple cotton and shortage of short, medium and long staple cotton.

#### Have Indian Cotton Yields Plateaued?

Biotech cotton, increased area under irrigation, new selective herbicides and

## Productivity Trend (kg lint/ha) of Cotton in India



insecticides, mechanisation and new varieties brought in major changes in production technologies in the last decade and a half. But have the yields plateaued? There are more than 30 countries whose productivity has consistently been above 600 kg/ha while the mean lint yield in India during the last five years is only 530 kg lint/ha while the cost of cultivating the crop continues to spiral upwards. While the last decade (2000-01 to 2009-10) witnessed a 6.8% Compounded Annual Growth Rate (CAGR) in productivity, during the first half of this decade (2010-11 to 2015-16) the CAGR in productivity declined to -0.74%.

### Have the Current Cotton Production Systems Become Unsustainable?

In the last 10 years, the cost of cotton cultivation increased three-fold, fertilizer consumption increased by 250% and the insecticide usage doubled. About 20,000 litres of water is consumed to produce one kilogram of cotton lint, which is one of the highest in the world. Production systems based on increased use of external inputs and inefficient use of water are seldom sustainable. Today the Indian cotton is at cross roads. The pink bollworm has developed resistance to Boll Gard II at a number of locations in Central and South India, yet again forcing farmers onto the pesticide treadmill. The

cotton leaf curl virus disease and whitefly took a heavy toll of cotton in the North India a couple of years back. Labour to cultivate cotton crop has become scarce and expensive forcing some farmers to grow Round up Ready (herbicide tolerant) cotton even without the clearance from the Government. It is imperative to shift towards more 'input use efficient' and 'sustainable yield enhancement techniques' in order to lower production costs and improve profits.

### Ushering a New Cotton Revolution:

The time is ripe for ushering another technological revolution in Indian cotton. Appropriate technologies and strategies are needed either to increase yields or reduce production costs. Ideally, these technologies must be sustainable, in harmony with nature and in consonance with local production systems. Some exciting technologies that can usher a new trend in Indian cotton are high density planting system with short duration, compact Bt cotton varieties, early maturing, long-linted desi (*Gossypium arboreum*) cotton specially suited for rainfed and dryland areas of Central India, using efficient legume based cropping systems with cotton, partial mechanisation of sowing and harvesting cotton, convergence of INM, IWM, IPM, IRM strategies into an ecology based production system to reduce input costs and greater use of

ICT based technologies to enable farmers make informed choices. Logically, large scale adoption of synchronous early maturing cultivars under HDPS would facilitate mechanical cotton picking. To remain competitive in the global market, we need to take care of contamination and mixtures. Massive efforts are needed to create awareness among the cotton farmers and to motivate them to follow the 'Best Cotton Management Practices' for improving quality and reducing the level

of contamination. To reduce imports there is a need to revive of ELS cotton production. All these can happen only with good science backed up by enabling policies and stringent regulatory regimes.

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

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## Global Consumption Expected to Grow

Recovery continues in cotton production for 2017/18 with a projected 11% growth due to increased area to a projected 25.4 million tons. Following the sharp drop in production in 2015/16, the 2016/17 production recovered by 7% to 23 million tons. Production in the USA for the current season is expected to increase 25% to 4.7 million tons, a 930 thousand increase. India remains the world's largest producer with 2017/18 production expected to be 6.2 million tons with 8.7% growth. The second largest producer, China, has production currently projected at 5.2 million tons with a 7.1% increase. Pakistan's production projections for 2017/18 show a 11.5% increase to 1.9 million tons. Production increase in Turkey is estimated to grow 18% to 829,000 tons. Projected harvested area in Argentina has been revised down 100,000 hectares with production anticipated to be 200,000 tons. Other major cotton producing countries are expected to have positive growth attributed to increased area and yields.

International cotton prices have continued to move upward over the last few months as the season has been underway. From the season low of 77 cents per pound at the start of season, prices are at a season high at the end of this calendar year up to 88 cents per pound. The current season average of 80 cents per pound is lower than the 2016/17 average of 83 cents per pound. With a lower international price from the previous season and the rising price of competing fibres, global consumption is

expected to grow. After stagnating in 2016/17, global cotton demand is expected to increase 3% in 2017/18 to 25.2 million tons. Chinese mill use is expected to remain stable at 8.1 million tons, while India and Pakistan are expected to increase 3% and 4% respectively. Consumption in Vietnam is expected to grow 12% to 1.3 million tons. Moderate growth of 2-3% is expected for other major consuming countries of Bangladesh, Turkey and the United States.



ICAC

Importing trends will reflect consumption trends as major consuming countries tend to rely in part on imports for spinning needs. Global cotton imports are expected to increase 3% to 8.3 million tons. Among major importers, Bangladesh is expected to increase imports 11% to 1.6 million tons with Vietnam increasing imports 20% to 1.4 million tons. Chinese imports remain steady with 1.3 million tons projected for 2017/18.

Major producing countries with export capacity are expected to see increased exports based on international demand for quality cotton. Australia's exports are projected to grow by 24% to 1.1 million tons. USA exports, while slightly below the high of the 2016/17 season will still remain the largest at 3.2 million tons. Exports from Brazil are expected to see a 8% growth to 655,000 tons, while Uzbekistan with lower production will expect a 2% decrease in exports.

*Source: ICAC Cotton This Month,  
January 02, 2018*

## Production of Fibres

(In Mn. Kg)

As on	Raw Cotton (Oct.-Sept.)	Synthetic			Cellulosic	Sub Total
		PSF	ASF	PPSF	VSF	
2010-11	5765	896.33	79.48	3.74	305.10	1284.65
2011-12	6239	829.74	77.71	4.08	322.64	1234.17
2012-13	6290	848.05	73.59	4.26	337.49	1263.39
2013-14	6766	845.95	96.12	3.71	361.02	1306.80
2014-15	6562	881.56	92.54	4.62	365.17	1343.89
2015-16	5746	893.95	106.81	4.70	341.91	1347.37
2016-17 (P)	--	898.97	96.37	3.64	364.99	1363.97
2017-18 (P) (Apr.-Oct.)	--	508.65	58.29	1.90	222.52	791.36
<b>2015-16</b>						
April	--	73.62	9.45	0.35	28.62	112.03
May	--	75.55	9.50	0.30	18.42	103.77
June	--	67.17	7.88	0.31	19.50	94.86
July	--	70.75	9.15	0.40	29.70	110.00
August	--	74.07	9.35	0.47	30.63	114.52
September	--	74.24	7.95	0.46	30.42	113.07
October	--	76.66	9.23	0.38	31.34	117.61
November	--	74.98	8.15	0.30	30.72	114.15
December	--	76.65	9.36	0.45	31.49	117.95
January	--	79.10	9.40	0.46	31.33	120.29
February	--	73.52	8.58	0.42	28.07	110.59
March	--	77.64	8.81	0.41	31.67	118.53
<b>2016-17 (P)</b>						
April	--	73.56	8.86	0.37	30.32	113.11
May	--	77.07	9.39	0.44	31.72	118.62
June	--	77.46	9.28	0.45	21.87	109.06
July	--	79.32	8.07	0.30	30.41	118.10
August	--	79.92	8.20	0.35	31.96	120.43
September	--	76.96	9.02	0.22	31.14	117.34
October	--	79.51	6.75	0.16	32.46	118.88
November	--	71.06	7.10	0.24	31.18	109.58
December	--	71.65	7.28	0.29	32.09	111.31
January	--	72.68	7.78	0.20	32.11	112.77
February	--	63.78	7.42	0.20	28.24	99.64
March	--	76.00	7.22	0.42	31.49	115.13
<b>2017-18 (P)</b>						
April	--	72.23	7.63	0.27	30.51	110.64
May	--	75.90	7.79	0.32	29.59	113.60
June	--	71.90	7.65	0.24	31.55	111.34
July	--	75.73	8.47	0.13	35.52	119.85
August	--	73.58	9.49	0.32	33.14	116.53
September	--	68.91	8.42	0.31	29.35	106.99
October	--	70.40	8.84	0.31	32.86	112.41

(P)= Provisional

Source : Office of the Textile Commissioner

## Supply and Distribution of Cotton

January 02, 2018

Seasons begin on August 1

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
		Est.	Est.	Est.	Est.	Proj.
	Million Metric Tons					
<b>BEGINNING STOCKS</b>						
<b>WORLD TOTAL</b>	<b>15.708</b>	<b>19.428</b>	<b>21.317</b>	<b>22.973</b>	<b>20.26</b>	<b>18.77</b>
China	6.696	10.811	13.280	14.118	12.65	10.63
USA	0.729	0.827	0.512	0.795	0.83	0.60
<b>PRODUCTION</b>						
<b>WORLD TOTAL</b>	<b>27.079</b>	<b>26.225</b>	<b>26.269</b>	<b>21.483</b>	<b>22.99</b>	<b>25.43</b>
India	6.290	6.766	6.562	5.746	5.73	6.23
China	7.600	7.000	6.600	5.200	4.90	5.25
USA	3.770	2.811	3.553	2.806	3.74	4.67
Pakistan	2.002	2.076	2.305	1.537	1.66	1.85
Brazil	1.310	1.734	1.563	1.289	1.53	1.57
Uzbekistan	1.000	0.910	0.885	0.832	0.79	0.80
Others	5.107	4.928	4.801	4.072	4.64	5.06
<b>CONSUMPTION</b>						
<b>WORLD TOTAL</b>	<b>23.450</b>	<b>24.101</b>	<b>24.587</b>	<b>24.180</b>	<b>24.52</b>	<b>25.22</b>
China	7.900	7.600	7.550	7.600	8.00	8.12
India	4.762	5.087	5.377	5.296	5.15	5.30
Pakistan	2.216	2.470	2.467	2.147	2.15	2.23
Europe & Turkey	1.560	1.611	1.692	1.687	1.61	1.63
Bangladesh	1.045	1.129	1.197	1.316	1.41	1.44
Vietnam	0.492	0.673	0.875	1.007	1.17	1.31
USA	0.762	0.773	0.778	0.751	0.71	0.73
Brazil	0.910	0.862	0.797	0.701	0.73	0.76
Others	3.802	3.896	3.854	3.675	3.60	3.70
<b>EXPORTS</b>						
<b>WORLD TOTAL</b>	<b>10.048</b>	<b>9.029</b>	<b>7.779</b>	<b>7.548</b>	<b>8.07</b>	<b>8.35</b>
USA	2.836	2.293	2.449	1.993	3.25	3.22
India	1.690	2.015	0.914	1.258	0.99	1.07
CFA Zone	0.821	0.973	0.966	0.963	0.97	0.98
Brazil	0.938	0.485	0.851	0.939	0.61	0.65
Uzbekistan	0.690	0.615	0.550	0.500	0.34	0.33
Australia	1.343	1.058	0.527	0.616	0.76	0.94
<b>IMPORTS</b>						
<b>WORLD TOTAL</b>	<b>10.213</b>	<b>8.858</b>	<b>7.800</b>	<b>7.572</b>	<b>8.11</b>	<b>8.35</b>
Bangladesh	1.055	1.112	1.183	1.378	1.41	1.57
Vietnam	0.517	0.687	0.934	1.001	1.20	1.43
China	4.426	3.075	1.804	0.959	1.10	1.34
Turkey	0.803	0.924	0.800	0.918	0.80	0.72
Indonesia	0.686	0.651	0.728	0.640	0.75	0.79
<b>TRADE IMBALANCE 1/</b>	<b>0.166</b>	<b>-0.171</b>	<b>0.020</b>	<b>0.023</b>	<b>0.05</b>	<b>0.00</b>
<b>STOCKS ADJUSTMENT 2/</b>	<b>-0.075</b>	<b>-0.063</b>	<b>-0.047</b>	<b>-0.034</b>	<b>-0.01</b>	<b>0.00</b>
<b>ENDING STOCKS</b>						
<b>WORLD TOTAL</b>	<b>19.428</b>	<b>21.317</b>	<b>22.973</b>	<b>20.264</b>	<b>18.77</b>	<b>18.98</b>
China	10.811	13.280	14.118	12.650	10.63	9.09
USA	0.827	0.512	0.795	0.827	0.60	1.32
<b>ENDING STOCKS/MILL USE (%)</b>						
<b>WORLD-LESS-CHINA 3/</b>	<b>55</b>	<b>49</b>	<b>52</b>	<b>46</b>	<b>49</b>	<b>58</b>
<b>CHINA 4/</b>	<b>137</b>	<b>175</b>	<b>187</b>	<b>166</b>	<b>133</b>	<b>112</b>
<b>COTLOOK A INDEX 5/</b>	<b>88</b>	<b>91</b>	<b>71</b>	<b>70</b>	<b>83</b>	

1/ The inclusion of linters and waste, changes in weight during transit, differences in reporting periods and measurement error account for differences between world imports and exports.

2/ Difference between calculated stocks and actual; amounts for forward seasons are anticipated.

3/ World-less-China's ending stocks divided by World-less-China's mill use, multiplied by 100.

4/ China's ending stocks divided by China's mill use, multiplied by 100.

5/ U.S. Cents per pound

Source : ICAC Cotton This Month, January 02, 2018



## Since 1921, we are dedicated to the cause of Indian cotton.

Just one of the reasons, you should use our Laboratory Testing Services.

The Cotton Association of India (CAI) is respected as the chief trade body in the hierarchy of the Indian cotton economy. Since its origin in 1921, CAI's contribution has been unparalleled in the development of cotton across India.

The CAI is setting benchmarks across a wide spectrum of services targeting the entire cotton value chain. These range from research and development at the grass root level to education, providing an arbitration mechanism, maintaining Indian cotton grade standards, issuing Certificates of Origin to collecting and disseminating statistics and information. Moreover, CAI is an autonomous organization portraying professionalism and reliability in cotton testing.

The CAI's network of independent cotton testing & research laboratories are strategically spread across major cotton centres in India and are equipped with:

- State-of-the-art technology & world-class Premier and MAG cotton testing machines
- HVI test mode with trash% tested gravimetrically

#### LABORATORY LOCATIONS

**Current locations :** • Maharashtra : Mumbai; Akola; Aurangabad • Gujarat : Rajkot; Mundra; Ahmedabad • Andhra Pradesh : Guntur, Warangal  
• Madhya Pradesh : Indore • Karnataka : Hubli • Punjab : Bathinda

**Upcoming locations :** • Telangana: Adilabad



**COTTON  
ASSOCIATION  
OF INDIA**

Established 1921

#### COTTON ASSOCIATION OF INDIA

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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) 2017-18 Crop JANUARY 2018					
Sr. No.	Growth	Grade Standard	Grade	Staple	Micronaire	Strength /GPT	1st	2nd	3rd	4th	5th	6th
1	P/H/R	ICS-101	Fine	Below 22mm	5.0-7.0	15	11754 (41800)	11754 (41800)	11754 (41800)	11754 (41800)	11810 (42000)	11810 (42000)
2	P/H/R	ICS-201	Fine	Below 22mm	5.0-7.0	15	11979 (42600)	11979 (42600)	11979 (42600)	11979 (42600)	12035 (42800)	12035 (42800)
3	GUJ	ICS-102	Fine	22mm	4.0-6.0	20	8802 (31300)	8717 (31000)	8689 (30900)	8717 (31000)	8717 (31000)	8717 (31000)
4	KAR	ICS-103	Fine	23mm	4.0-5.5	21	9589 (34100)	9505 (33800)	9476 (33700)	9476 (33700)	9533 (33900)	9533 (33900)
5	M/M	ICS-104	Fine	24mm	4.0-5.0	23	10432 (37100)	10348 (36800)	10320 (36700)	10320 (36700)	10376 (36900)	10376 (36900)
6	P/H/R	ICS-202	Fine	26mm	3.5-4.9	26	11192 (39800)	11135 (39600)	11107 (39500)	11135 (39600)	11248 (40000)	11220 (39900)
7	M/M/A	ICS-105	Fine	26mm	3.0-3.4	25	9926 (35300)	9926 (35300)	9898 (35200)	9926 (35300)	9983 (35500)	9954 (35400)
8	M/M/A	ICS-105	Fine	26mm	3.5-4.9	25	10432 (37100)	10432 (37100)	10404 (37000)	10432 (37100)	10489 (37300)	10461 (37200)
9	P/H/R	ICS-105	Fine	27mm	3.5-4.9	26	11389 (40500)	11304 (40200)	11276 (40100)	11304 (40200)	11417 (40600)	11389 (40500)
10	M/M/A	ICS-105	Fine	27mm	3.0-3.4	26	10208 (36300)	10208 (36300)	10179 (36200)	10208 (36300)	10264 (36500)	10236 (36400)
11	M/M/A	ICS-105	Fine	27mm	3.5-4.9	26	10686 (38000)	10686 (38000)	10657 (37900)	10686 (38000)	10742 (38200)	10714 (38100)
12	P/H/R	ICS-105	Fine	28mm	3.5-4.9	27	11557 (41100)	11473 (40800)	11445 (40700)	11501 (40900)	11614 (41300)	11585 (41200)
13	M/M/A	ICS-105	Fine	28mm	3.5-4.9	27	11079 (39400)	10995 (39100)	10967 (39000)	10995 (39100)	11051 (39300)	11023 (39200)
14	GUJ	ICS-105	Fine	28mm	3.5-4.9	27	11164 (39700)	11164 (39700)	11135 (39600)	11192 (39800)	11276 (40100)	11248 (40000)
15	M/M/A/K	ICS-105	Fine	29mm	3.5-4.9	28	11332 (40300)	11248 (40000)	11220 (39900)	11248 (40000)	11304 (40200)	11276 (40100)
16	GUJ	ICS-105	Fine	29mm	3.5-4.9	28	11473 (40800)	11389 (40500)	11360 (40400)	11417 (40600)	11501 (40900)	11473 (40800)
17	M/M/A/K	ICS-105	Fine	30mm	3.5-4.9	29	11557 (41100)	11501 (40900)	11473 (40800)	11529 (41000)	11585 (41200)	11557 (41100)
18	M/M/A/K/T/O	ICS-105	Fine	31mm	3.5-4.9	30	11810 (42000)	11810 (42000)	11782 (41900)	11838 (42100)	11923 (42400)	11895 (42300)
19	A/K/T/O	ICS-106	Fine	32mm	3.5-4.9	31	12345 (43900)	12345 (43900)	12345 (43900)	12401 (44100)	12457 (44300)	12457 (44300)
20	M(P)/K/T	ICS-107	Fine	34mm	3.0-3.8	33	15888 (56500)	16028 (57000)	16028 (57000)	16028 (57000)	16028 (57000)	16028 (57000)

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