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WTO Disciplines Must Apply to Developing Countries Too

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EXPERT's Column

Dr. Terry Townsend

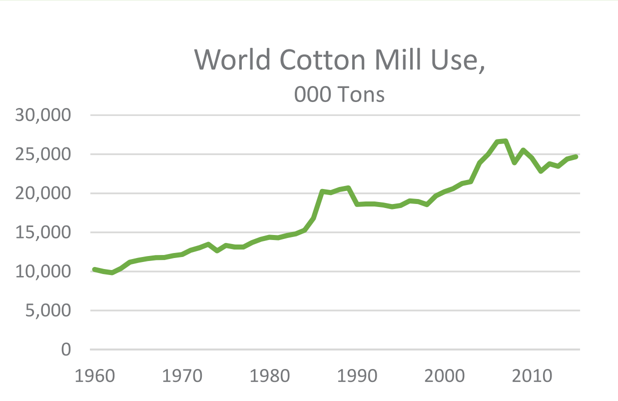
In the Age of Sail, all lines on ships were made of natural fibres, mostly hemp and sisal, and millions of tons of both fibres were produced each year. As late as the 1960s, world hemp production was still nearly 400,000 tons per year and sisal production still totalled 750,000 tons per year. Today, with the exception of museum ships, all ships' lines are made of nylon, polypropylene or polyester, and world production of hemp has fallen to less than 60,000 tons while sisal production has fallen to less than 300,000 tons, most of which is used in agricultural twines and cordage.

Prior to the advent of "fast fashion" and "casual Fridays," wool was a major apparel fibre. In the 1960s, wool accounted for 10% of world apparel fibre use, and wool production for all uses including carpets reached 1.8 million tons in the early 1990s. Today, wool accounts for 1.2% of world apparel fibre use, and production has fallen to 1.1 million tons.

Prior to the invention of manmade fibres, all apparel fibres were natural, and in the 1800s and early 1900s, cotton probably accounted for 85% of world fibre use. However, with the development of nylon, rayon, polyester, and other manmade fibres, cotton's share has fallen. In the 1960s, cotton still accounted for two-thirds of all apparel fibre use. By the 1980s, cotton's share had fallen to half, and today, cotton's share of world fibre consumption is less than 30%, and falling. World cotton consumption reached 26.6 million tons in 2007, but eight years later in 2015, despite population growth of 8% or 600 million, and cumulative world real GDP growth of 18%, world cotton consumption is still 2 million tons less than it was at its peak. Just as with sisal, wool and other natural fibres, the world may have passed peak use of cotton.

Impact of the China State Reserve

As reported by the International Cotton Advisory Committee ("Production and Trade Policies Affecting the Cotton Industry," ICAC,



December 2015), subsidies paid by all governments to the cotton sector, including direct support to production, border protection, crop insurance subsidies, and minimum support price mechanisms reached a record $10.4 billion in 2014/15, up from the previous record of $6.5 billion in 2013/14. Twelve countries provided subsidies in 2014/15, but of the 12, China alone accounted for 63% of the total. Further, of the subsidies and market interventions proffered by the 12 governments, only China is explicitly intervening in a manner that raises prices and thus undermines cotton consumption.

China maintains a state reserve containing more than half of all world stocks by restricting imports and auctioning only enough cotton to domestic users to offset domestic production. The result is that the Cotlook A Index has been maintained around 70 cents per pound for more than a year. While this is equal to the long run average, it remains well above the price of polyester.

Relative fibre prices are extremely important in determining fiber market shares. When introduced in the 1950s, prices of polyester were far higher than those of cotton, but prices of polyester reached parity with cotton in 1972 and have been correlated in the decades since. The most recent 8-year interval, from 2008 to 2015, has been brutal to the competitive interests of cotton. During this period, cotton prices have averaged 42 cents per kilogram more than prices of polyester, a premium of 26%.

High prices are undermining the competitiveness of cotton relative to polyester. Since 2007, cotton's share of world apparel fibre consumption has fallen from 38.4% to 27.6%, a staggering loss of market share of more than 10 percentage points. Not all of the loss can be blamed on the cotton policies of China. Indeed, the volatility in cotton prices during 2008 and 2010/11, before China began building a state reserve in 2011, caused much demand destruction. Nevertheless, China's persistence in maintaining a state reserve at a time while polyester prices have fallen to less than 45 cents per pound in China, is contributing to a continued slide in market share that now threatens the long term viability of cotton as an industry.

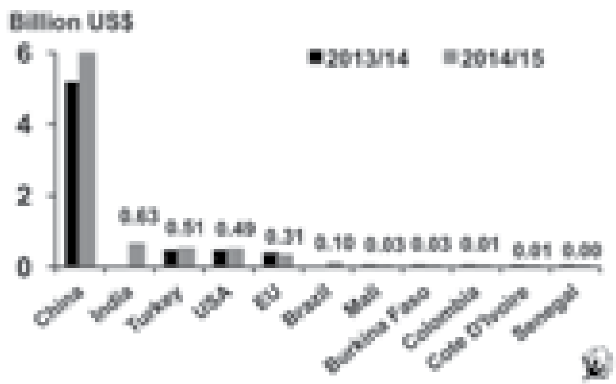
Implications

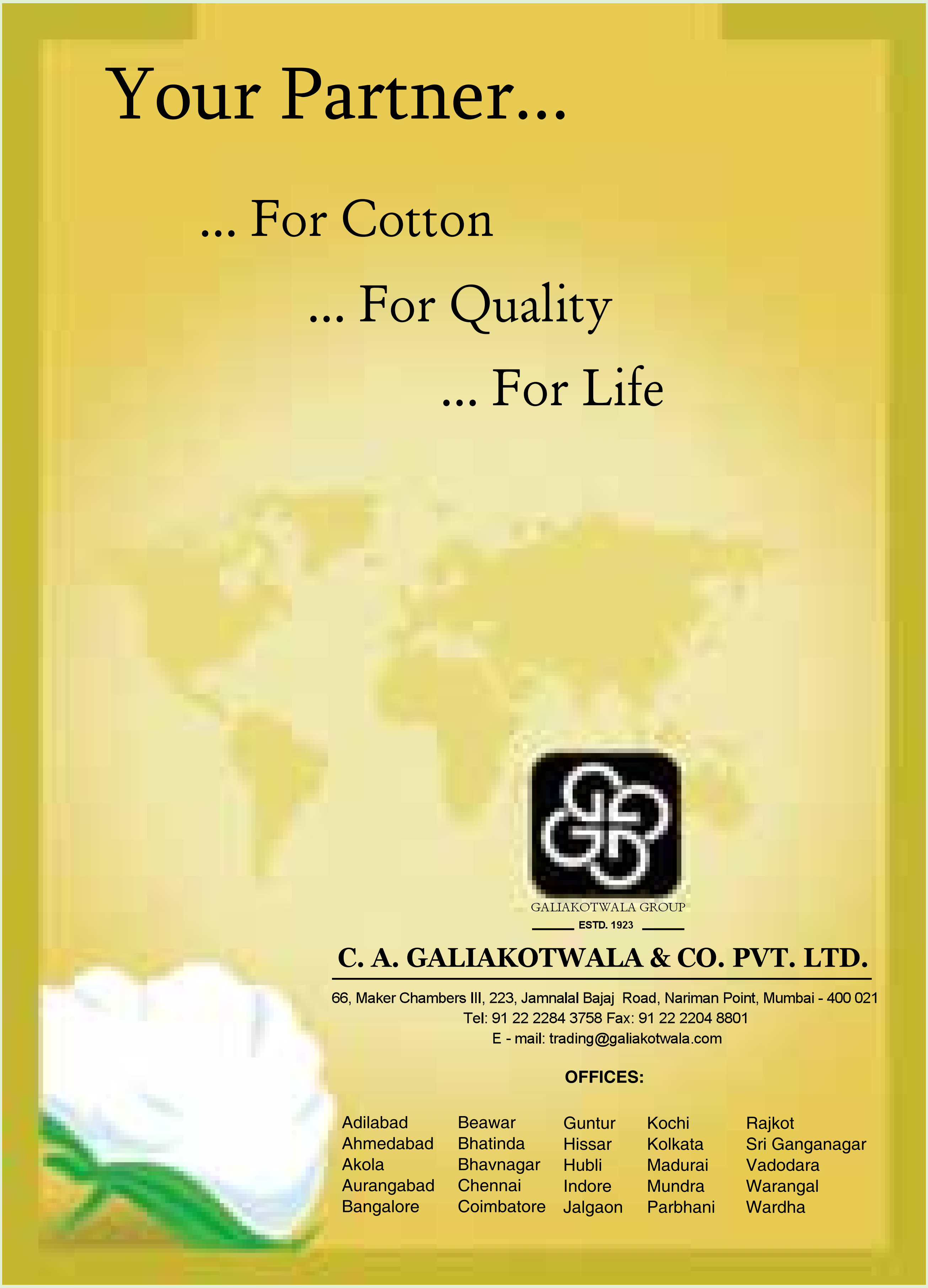
The modern cotton industry based on international trade in saw ginned upland cotton is approximately 200 years old, and over that time governments could intervene in markets, secure in the knowledge that no matter how much harm they did, the world cotton industry itself would recover. However, the loss of market share to polyester during the 21st century has been so rapid and so severe that cotton has reached a point of much greater vulnerability.

In decades past, government measures that distorted cotton production and trade or encouraged the use of polyester, and thus interfered with market prices, may have slowed the rate of increase in cotton use. Today such policies threaten to destroy cotton as an industry. In particular, the policy of the Government of China to stockpile cotton, thus restricting the amount of cotton available to the market, is undermining the world cotton industry by keeping prices above a level that would be competitive with polyester.

Historically, governments have negotiated reductions in barriers to trade in the World Trade Organization, as well as in regional and bilateral trade arrangements. The last decade has seen much progress in reducing distortions to cotton production and trade caused by government measures in the United States and Europe, but developing countries, including China and India, have shielded behind their poverty and have refused to acknowledge that their actions too can destroy markets and undermine incomes. The Government of India in particular, has led developing countries

Direct Assistance to Cotton

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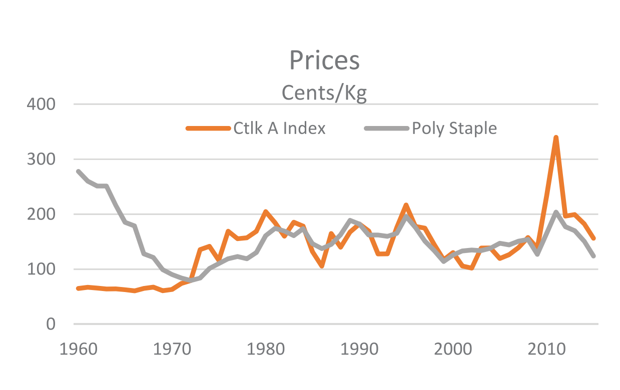

in claiming a special privilege from WTO disciplines to distort commodity markets to protect domestic producers.

Consequently, while developed countries have largely eliminated support programs that distort production and trade under pressure from WTO commitments, developing countries still impose export restrictions, support prices, and build stocks with impunity.

With the structure of the world cotton market having changed so that a majority of production and mill use is now in developing countries, it no longer makes sense for those same countries to claim an exemption from the disciplines of WTO membership to enable the continuation of policies that destroy markets, rather than building them. While the current cotton situation spotlights the adverse market impacts of the stocks policy of China, India shares in the responsibility for WTO rules that turn a blind eye to the harmful policies of developing countries. Cotton producers around the world would benefit from a change in the negotiating position of India in the WTO to favor the inclusion of developing countries in the same disciplines over commodity policies that apply to developed countries.

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


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PRESENCE AT ALL MAJOR AND MINOR PORTS OF INDIA & WORLD

Intensive Cotton Farming Technologies in China

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(Contd. from Issue No. 40)

Removal of old leaves and empty fruit branches

During the middle of the growing period, removal of old, yellow and diseased leaves and the empty fruit branches can remarkably improve ventilation and light penetration, as well as decrease soil humidity and boll rot (CRI, 2013). Removal of older leaves and empty fruit branches should be done as a function of plant growth after full flowering.

Removal of apical points of vegetative and fruiting branches

Removing the apical points of both vegetative and fruiting branches can delay canopy closure by limiting the horizontal growth of branches (CRI, 2013). Removal of apical points of vegetative branches can also enhance root growth and mitigate premature senescence of the plants, and thus increase lint yield (Dong et al., 2003). Researchers found that pruning the side branches improved cotton yield, lint percentage and earliness while reducing boll rot (Bennett et al., 1965). The apical points of vegetative branches are usually removed in mid-July, while those of fruiting branches can be removed in early August.

Removal of early fruit branches

Fruit shedding or loss appears to be necessary to ensure normal development of retained bolls that are carried through to maturity because the cotton plant produces many more fruit than it can possibly bring to maturity (Malik et al., 1981). Loss of early fruiting forms can elicit compensatory growth (Sadras, 1995). Early-fruit removal enhances vegetative growth and development. Thus it can be used to coordinate the relationship between vegetative and reproductive growth (Dong et al., 2009b). Removal of early fruiting forms is currently done in early squaring cotton to mitigate premature senescence because it increases the level of total nitrogen (N), soluble protein, as well as glutamic-pyruvic transaminase (GTP) activity in leaves (Zhang et al., 2009), thereby increasing lint yield (Dong et al., 2008c, 2009b). It was also reported that removal of early squares reduced the incidence of Verticillium wilt disease and early senescence indices (Zhu et al., 2008). Removal of early fruiting branches is usually performed five days after squaring. The lowermost two or three fruiting branches on the main stem are removed by hand.

Super-high Plant Density Technique

Light and heat resources in the Northwest Inland Cotton region are abundant, but cotton productivity is low due to the limited duration of the effective growing season in this region. In order to make the most productive use of the light and heat resources available in the region and, particularly, to avoid the adverse effects of the limited growing season, a high-yielding cultivation pattern called "short-dense-early" has been widely adopted in that area. This pattern is achieved by increasing plant density, keeping plant height low and inducing early maturity with the support of drip irrigation under plastic mulching (Zhang et al., 1999). Close planting is one of the most important aspects of the "short-dense-early" planting technique (Fig. 2l). Close planting is suitable in the Northwest Inland Cotton area because of the favorable climate conditions, such as: higher temperature difference between day and night, longer duration of daylight and less rainfall. These climatic conditions are favorable for effective control of excessive growth, even at high plant density. The planting density is always in the range of 200,000-300,000 plants/ha, and plant height is controlled to a range of 60-75 cm through chemical regulation and water and fertilizer management (CRI, 2013). Additionally, other cultivation measures, such as using early maturity varieties, early planting and especially drip irrigation under plastic film mulching are also used to promote early maturity and lint yield (Cao and Lin, 2007; Zhou et al., 2012). The average lint yield in this region reached 1,927 kg/ha, and a total of 3.18 million tons of cotton fiber was produced in 2014/15 as compared to 1.65 million tons in Xinjiang in 2012/13. It is easy for most farmers in Xinjiang to achieve yields of 2,250 kg/ha with the "short-dense-early" scheme (Wang, 2009). It was also reported that a record lint yield of 4,900 kg/ha was obtained in a small part of Xinjiang in 2009 (Maimaiti et al., 2012).

The Northwest Inland Cotton area of China is located in an arid inland region with low rainfall. Because cotton flowering and boll-setting stages are sensitive to water stress, the technique of drip irrigation under film mulching (Fig. 2k) is commonly applied in the area (Ma and Yang, 1999). Based on

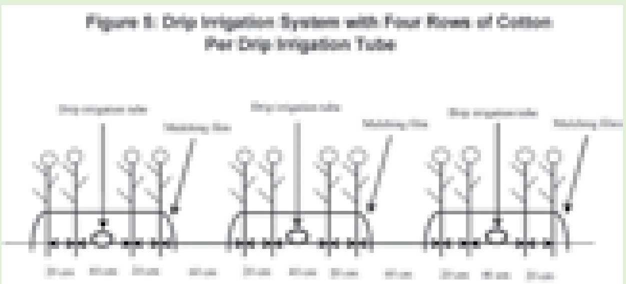
Figure 5: Drip Irrigation System with Four Rows of Cotton Per Drip Irrigation Tube

Table 3: Current Status and Prospects of Cotton Cultivation Measures in China

Measures	Present	Prospect
Planting and thinning	Conventional seeding, 30-45 kg seed per hectare, and manual freeing and thinning of seedlings.	Precision seeding, 15-19 kg seed per hectare; no manual freeing or thinning.
Inter tillage	8-10 times during the whole growth season.	2-3 times at the full post-emergence and full squaring or flowering stage.
Fertilization	3-4 times with rapid release fertilizers at planting, squaring or flowering stage and after topping. This implies more labor and lower fertilizer use efficiency	One time at planting with slow- or controlled-release fertilizer. Labor saving and higher fertilizer use efficiency.
Plant training	Manual removal of vegetative branches, old leaves and redundant buds and growth terminals on the main stem.	Retention of vegetative branches at lower plant density, inhibition of growth of vegetative branches through increased plant density, plant growth regulators, or through use of chemical substitutes for topping.
Plastic mulching	Film thickness of 0.004-0.006 mm, lower residual film recovery.	≥0.012 mm thick film for better recovery; use of film substitutes instead of conventional plastic film.
Planting pattern	Double-cropping through direct seeding or transplanting before harvest of wheat/rapeseed.	Direct seeding of short-season cotton after harvesting or transplanting seedlings after wheat/rapeseed harvest
Management mode	Scattered distribution and small-scale plantations.	Concentrated distribution and scaling up plantations
Mechanization	Currently 40%: including tillage, sowing, fertilization, inter tillage and stalk mulching.	Ten years hence: ≥70%, including tillage, sowing, fertilization, inter tillage, picking, and stalk mulching.

the number of cotton rows per irrigation tube, the drip irrigation system was divided into double rows per tube and four rows per tube. At present, the pattern of four rows per drip irrigation tube (Fig. 5) is commonly used in the Northwest Inland Cotton region. There are multiple advantages to drip irrigation under film mulching, such as effectively reducing moisture loss and improving water and nutrient use efficiency by increasing the coverage rate (Liu et al., 2006; Zheng et al., 2000). Compared to flood irrigation, drip irrigation under film increased water economy and yields by 20-50% and 10-30%, respectively (Ma and Yang, 1999, and Liu, 2008), and water and nitrogen efficiency also greatly improved in Southern Xinjiang (Liu and Tian, 2007).

On the other hand, drip irrigation effectively alleviates weeds, diseases and insect pests, decreases the incidence of boll rot and improves seedcotton yield and fiber quality (Liu et al., 2005; Hu and Zhang, 2005). Liu et al. (2007) also found that damage by Aphis gossypii and spider mite on cotton was reduced with drip irrigation under plastic mulching. In saline fields, drip irrigation under film induced low salinity distribution around the root zone, which significantly alleviated salinity stress and enhanced seedling establishment and plant growth (Liu and Tian, 2005; Zhou et al., 2006). Yan et al. (2009) reported that cotton roots were mainly distributed in the mulched area, occupying about 61-73% of total root biomass, while only about 27-39% was distributed in the uncovered area. Compared with equal salt distribution in the root zone, unequal salt distribution could decrease Na^+ concentration in leaves owing to higher root Na^+ efflux in the low salinity side, increased leaf photosynthesis, transpiration and water and nutrient uptake, all of which enhanced the cotton biomass, lint yield and earliness (Kong et al., 2012; Dong et al., 2010b).

Countermeasures and Prospects

Intensive farming technologies, including double cropping, transplanting of seedlings, plastic mulching and plant training, as well as the "short-dense-early" high-yielding cultivation pattern in the Northwest Inland area have played vital roles in supporting China's drive to become the largest cotton producer in the world. However, cotton production in China is currently facing significant challenges, such as soil pollution by plastic film and chemicals, labor shortage due to urbanization of the population and intense competition by food crops for land. The most realistic approach to these challenges would be to reform traditional intensive farming technologies, i.e., reducing soil pollution through rational use of plastic film and chemicals, economizing on labor by simplifying management and intensifying mechanization, and increasing benefits by reforming the cropping system and the management mode. We are convinced that reformed farming technologies (Table 3) will play a more important role in sustainable cotton production in China than the traditional intensive farming technologies.

Source: The ICAC Recorder, Vol. XXXIII No.2 – June 2015

COTAAP Corner

Events for January 2016

The cotton crop in Chopda, Jalgaon, is in its last phase of harvesting with a limited area under further crop. COTAAP Chopda unit is preparing to conduct a feedback survey.

COTAAP have been instrumental in linking innovations in production technology to address problems in the fields. The various trials of Bt cotton, ELS Cotton, HDP and ultra-high density plantation in case of desi variety developed by CICR Nagpur, have educated farmers and empowered them to choose the suitable technology.

Introduction of ELS

In 2015-16, COTAAP introduced an ELS variety, Mahyco-'Bahubali' to more than 300 farmers and this was planted in 500 acres to produce quality cotton as per the demands of the market. Farmers got a premium of Rs. 800-Rs.1200 per quintal as compared to the price of H4 variety traditionally sown in Chopda. Thousands of farmers have observed the demonstrations and we are confident that more farmers will adopt this ELS variety on a large scale, this year. This variety is seen as a potential substitute for imported cotton, and will benefit all stakeholders in the cotton industry.

As some farmers are still holding cotton, COTAAP staff is coordinating the last phase of procurement of ELS cotton. COTAAP has started a novel concept of distributing clean cotton harvesting bags since last year with the objective of reducing contamination in cotton at the farm level itself. This endeavor has started showing results. Farmers have taken to the concept of cotton bags quite enthusiastically. The difference in the quality can well be seen in the cotton brought in cotton bags by the farmers.

Introduction of Non-Bt CICR Variety

Increasing cost of production has disturbed the economy of the farmers. Seed is one of the expensive inputs in cotton cultivation. To minimise this, with the technical support of Central Institute for Cotton

COTAAP staff coordinating purchase of cotton at Chopda

Research, Nagpur, COTAAP has demonstrated that seed produced from the straight type 'Suraj' variety, can be reused for sowing. Adoption of such cost saving technologies can surely increase the net profit of the farmer and ultimately help in sustaining the entire cotton industry.

Almost all the cultivated Suraj variety in the area has been uprooted now. The final harvested cotton from non Bt straight variety has fetched good rates in market, mostly the same as that of Bt cotton in this area. Looking at the overall performance of the variety, it may prove helpful to farmers with less fertile soil and in farms which are under rainfed conditions, in the coming years.

Training to Students

Along with the extension work undertaken for the upliftment of farmers, COTAAP has also initiated a unique project of vermicompost and vermi wash in its campus at Chopda. This unit has gained reputation in the area for being constructed in a technically sound manner yet at a very low cost. It is the only operational project in the entire district expanded over such large area and conducted with such scientific precision. Earlier too, the COTAAP Chopda unit had conducted several training programmes for farmers to teach them about these techniques. Along with farmers, students of different schools from kindergarten to secondary level also visit the unit to learn about the novel concept of vermicompost.

As vermiworms play a vital role in the solid waste management of cities by converting city waste in compost in very efficient way, it has started gaining importance all over the world. Third year students from the civil stream of polytechnic engineering also attended the 'Introduction to Concept of Vermicompost' course at the COTAAP's Chopda campus. Three batches of 20 students each attended the course held on 17th, 18th and 19th January 2016. Shri Sanjay Deshmukh. Supervisor of the COTAAP Chopda unit, conducted the training.

Students attend training programme of vermicompost conducted at COTAAP campus Chopda

Production of Fibres

(In Mn. Kg)

As on	Raw Cotton (Oct.-Sept.)	Synthetic			Cellulosic	Sub Total
		PSF	ASF	PPSF	VSF	
2005-06	4097	628.15	107.81	3.08	228.98	968.02
2006-07	4760	791.99	97.13	3.52	246.83	1139.47
2007-08	5219	879.61	81.23	3.43	279.90	1244.17
2008-09	4930	750.12	79.50	3.44	232.75	1065.81
2009-10	5185	872.13	90.45	3.38	302.09	1268.05
2010-11	5763	896.33	79.48	3.74	305.10	1284.65
2011-12	5899	829.74	77.71	4.08	322.64	1234.17
2012-13	--	848.05	73.59	4.26	337.49	1263.39
2013-14	--	845.95	96.12	3.71	361.02	1306.80
2014-15 (P)	--	881.56	92.54	4.62	365.17	1343.89
2015-16 (Apr-Sept.) (P)	--	512.06	64.16	2.75	188.63	767.60
2013-14 (P)						
April	--	65.66	8.26	0.27	26.39	100.58
May	--	70.67	8.54	0.31	30.80	110.32
Jun	--	71.56	8.08	0.30	30.51	110.45
Jul	--	72.26	7.78	0.34	30.97	111.35
August	--	74.67	8.26	0.32	31.44	114.69
September	--	72.29	8.58	0.22	29.58	110.67
October	--	72.67	8.63	0.28	30.98	112.56
November	--	68.28	8.28	0.31	29.96	106.83
December	--	70.68	8.62	0.31	30.88	110.49
January	--	70.40	6.76	0.32	30.86	108.34
February	--	64.87	7.01	0.33	27.61	99.82
March	--	71.94	7.32	0.40	31.04	110.70
2014-15 (P)						
April	--	70.24	8.52	0.38	29.91	109.05
May	--	70.79	7.48	0.36	31.30	109.93
June	--	70.62	8.32	0.36	28.62	107.92
July	--	81.56	6.26	0.33	30.72	118.87
August	--	74.63	8.67	0.36	30.68	114.34
September	--	68.45	7.82	0.40	30.14	106.81
October	--	72.14	8.35	0.36	31.16	112.01
November	--	70.08	7.57	0.40	30.21	108.26
December	--	75.14	8.46	0.44	31.58	115.62
January	--	79.00	6.04	0.40	31.47	116.91
February	--	73.32	7.29	0.40	28.07	109.08
March	--	75.59	7.76	0.43	31.31	115.09
2015-16 (P)						
April	--	73.62	9.53	0.35	28.62	112.12
May	--	75.55	9.51	0.30	18.42	103.78
June	--	67.17	8.43	0.31	19.50	95.41
July	--	70.75	9.20	0.40	29.70	110.05
August	--	74.07	9.09	0.47	30.63	114.26
September	--	74.24	9.12	0.46	30.42	114.24
October	--	76.66	9.28	0.38	31.34	117.66
November	--	74.98	8.28	0.30	31.34	114.90

(P)= Provisional

Source : Office of the Textile Commissioner

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) 2015-16 Crop JANUARY 2016					
Sr. No.	Growth	Grade Standard	Grade	Staple	Micronaire	Strength /GPT	18th	19th	20th	21st	22nd	23rd
1	P/H/R	ICS-101	Fine	Below 22mm	5.0-7.0	15	8858 (31500)	8942 (31800)	8942 (31800)	8942 (31800)	8802 (31300)	8802 (31300)
2	P/H/R	ICS-201	Fine	Below 22mm	5.0-7.0	15	8998 (32000)	9083 (32300)	9083 (32300)	9083 (32300)	8942 (31800)	8942 (31800)
3	GUJ	ICS-102	Fine	22mm	4.0-6.0	20	6580 (23400)	6608 (23500)	6608 (23500)	6608 (23500)	6580 (23400)	6608 (23500)
4	KAR	ICS-103	Fine	23mm	4.0-5.5	21	7367 (26200)	7396 (26300)	7396 (26300)	7396 (26300)	7367 (26200)	7396 (26300)
5	M/M	ICS-104	Fine	24mm	4.0-5.0	23	8605 (30600)	8633 (30700)	8633 (30700)	8633 (30700)	8605 (30600)	8633 (30700)
6	P/H/R	ICS-202	Fine	26mm	3.5-4.9	26	9336 (33200)	9392 (33400)	9392 (33400)	9308 (33100)	9280 (33000)	9280 (33000)
7	M/M/A	ICS-105	Fine	26mm	3.0-3.4	25	8492 (30200)	8548 (30400)	8548 (30400)	8548 (30400)	8520 (30300)	8548 (30400)
8	M/M/A	ICS-105	Fine	26mm	3.5-4.9	25	8633 (30700)	8689 (30900)	8689 (30900)	8689 (30900)	8661 (30800)	8689 (30900)
9	P/H/R	ICS-105	Fine	27mm	3.5.4.9	26	9617 (34200)	9673 (34400)	9673 (34400)	9589 (34100)	9561 (34000)	9561 (34000)
10	M/M/A	ICS-105	Fine	27mm	3.0-3.4	26	8745 (31100)	8802 (31300)	8802 (31300)	8802 (31300)	8773 (31200)	8802 (31300)
11	M/M/A	ICS-105	Fine	27mm	3.5-4.9	26	8914 (31700)	8970 (31900)	8970 (31900)	8970 (31900)	8942 (31800)	8970 (31900)
12	P/H/R	ICS-105	Fine	28mm	3.5-4.9	27	9758 (34700)	9814 (34900)	9814 (34900)	9729 (34600)	9673 (34400)	9673 (34400)
13	M/M/A	ICS-105	Fine	28mm	3.5-4.9	27	9251 (32900)	9308 (33100)	9336 (33200)	9336 (33200)	9308 (33100)	9336 (33200)
14	GUJ	ICS-105	Fine	28mm	3.5-4.9	27	9336 (33200)	9392 (33400)	9420 (33500)	9420 (33500)	9392 (33400)	9420 (33500)
15	M/M/A/K	ICS-105	Fine	29mm	3.5-4.9	28	9392 (33400)	9448 (33600)	9476 (33700)	9476 (33700)	9448 (33600)	9476 (33700)
16	GUJ	ICS-105	Fine	29mm	3.5-4.9	28	9448 (33600)	9505 (33800)	9533 (33900)	9533 (33900)	9505 (33800)	9533 (33900)
17	M/M/A/K	ICS-105	Fine	30mm	3.5-4.9	29	9505 (33800)	9561 (34000)	9589 (34100)	9589 (34100)	9561 (34000)	9617 (34200)
18	M/M/A/K/T/O	ICS-105	Fine	31mm	3.5-4.9	30	9673 (34400)	9729 (34600)	9758 (34700)	9758 (34700)	9729 (34600)	9786 (34800)
19	A/K/T/O	ICS-106	Fine	32mm	3.5-4.9	31	10039 (35700)	10095 (35900)	10095 (35900)	10039 (35700)	10011 (35600)	10095 (35900)
20	M(P)/K/T	ICS-107	Fine	34mm	3.0-3.8	33	13919 (49500)	13919 (49500)	13919 (49500)	13919 (49500)	13835 (49200)	13835 (49200)

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