



**INTERNATIONAL  
COTTON  
ADVISORY  
COMMITTEE**

# Specialty Cotton Report

## ELS and LS Cotton

World production, consumption  
and trade  
by country figures

## Identity Cotton

Production levels  
by programme



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## **PREFACE**

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*The report reflects an increasing need to report demand and supply statistics on extra-long staple (ELS) and long staple (LS) cotton. For the purposes of this report, “specialty cotton” is any cotton that is of Long or Extra Long staple variety or falls under any specific identity program. Consequently, all kinds of long staple cotton, extra-long staple cotton, and cotton produced under a specific identity program are now covered by ICAC in this Report. Driven by rising production under identity programs and increasing efforts by governments to produce these specialized ELS and LS cottons, the lack of standardization in defining these types of cotton across national boundaries and the presence of multiple identity programs has necessitated the creation of a focused Specialty Cotton Report. ICAC’s efforts on specialized cotton date back to the late 1980s when, for the first time, member governments asked the ICAC Secretariat to publish information on ELS and LS cotton. This prompted the creation of the ICAC’s Extra Fine Report.*





*At the same time, the cotton-textile sector continued to evolve. The sector embraced climate change and sustainability more closely, and saw the rise of the new value-oriented consumer who demands cotton that is climate-friendly, sustainable, free of forced or child labor, ensures fair prices to its producers, supports livelihoods and gender equality, and protects the environment. Cotton has increasingly needed to demonstrate its commitment to supporting global public goods to maintain its social license to operate based on the approval within key stakeholders. To meet the need of this new type of consumer, the cotton value chain saw the creation of multiple identity programs and certifications, many of which are benchmarked with each other while others stand alone.*

*We acknowledge that it might take some time to perfect a publication, so we welcome comments and suggestions at [Parkhi@icac.org](mailto:Parkhi@icac.org).*





## **SPECIALITY COTTON PRODUCTION**

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**Specialty cotton currently comprises around 31% of world cotton lint production, up by 2% from last season and increasing every season. Identity programs that apply different sets of social, environmental and economic standards in their production processes together comprise around 29% of total world cotton production.**

**World cotton lint production saw a 3% decline in the 2022/23 season due to adverse weather conditions around the globe and included problems such as floods, drought, and pest pressure, among others. However, the production under specialty cotton increased by 2% in the same year, with production under ELS and LS cotton recording an increase of 46%.**

**Several reasons contributed to an increase in ELS and LS production. Favorable factors in almost all the major ELS and LS cotton-producing countries—increased prices, favorable weather, and special impetus provided by the respective governments—added momentum to production. Many of these increases were driven by the promise of increased prices and profitability normally associated with high value-added products such as specialty cotton.**







Amongst ELS and LS producers, the countries that stand out are Egypt, the US, China, and India, all of them reporting an increase in production in the 2022/23 season. Each of them individually accounts for a little less than 0.5% of total world production. Table 1 shows the production figures of leading producers and Table 2 covers their production as a percentage of world level. A detailed analysis of ELS and LS cotton market players is covered in the report.

Total production under identity programs remained approximately the same, however, the REEL Cotton Program and Responsible Brazilian Cotton (ABR) Program (Brazil) showed an impressive increase in cotton production where both increased by 41% and 27%, respectively. The impressive increase in REEL cotton was due to new enrollments and increased production in Bangladesh and India, whereas Brazil witnessed an impressive yield and a massive crop and successfully increased the total percentage of its crop certified under the ABR program.

Amongst the leading identity programs, the Better Cotton Initiative (BCI) and equivalents dominate cotton production, covering around 20.2% of total world cotton production. The Responsible Brazilian Cotton (ABR) Program (Brazil) alone accounts for 10.5% of world production and is also BCI equivalent. Some other major and exceptionally growing identity programs are myBMP (Australia), Cotton Made in Africa, and US Cotton Trust Protocol, among others. A detailed analysis of identity programs is covered in the report.





<b>SPECIALTY COTTON PRODUCTION</b>			
000 MT			
	2020/21	2021/22	2022/23
<b>Total world cotton production</b>	<b>24612</b>	<b>25055</b>	<b>24387</b>
<b>Total Specialty Cotton production</b>	<b>6561</b>	<b>7390</b>	<b>7534</b>
<b>Total ELS and LS cotton production</b>	<b>390</b>	<b>326</b>	<b>475</b>
<b>Total cotton production under Identity programs</b>	<b>6171</b>	<b>7065</b>	<b>7059</b>
<b>Leading ELS and LS cotton producers</b>			
- United States	117	71	101
- Egypt	73	76	119
- India	85	85	108
- China	65	40	85
<b>Leading Identity Programs</b>			
BCI and Equivalents	5021	5523	4937
- Responsible Brazilian Cotton (ABR) Program (Brazil)	1970	2003	2550
myBMP (Australia) (total)	410	410	420
Cotton Made in Africa	677	716	508
Organic cotton as reported by Textile Exchange	342	342	342
The e3 Sustainable Cotton Programme by BASF	215	258	258
REEL cotton program	187	155	219
US cotton Trust Protocol	240	376	346

**NOTES**

1. All figures are approximates based on collected data and ICAC calculations. Brazil figures may not perfectly match with ICAC data base as the reported seasons differ.
2. Subject to some level of double counting if the ELS and LS production was covered under an identity program.
3. Not all myBMP production is BCI equivalent and therefor all the production certified by BCI is reported under it while the total figures under myBMP are reproted under it. CMIA data is seperated from BCI equivalent starting 2023. Untill 2022, CMIA production is counted under BCI and quivalent final figure. Adjustments are made to calculate the total production figures under indentity programs.



<b>SPECIALTY COTTON PRODUCTION</b>			
<b>As a percentage of total world production</b>			
	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>
<b>Total Specialty Cotton production</b>	<b>27</b>	<b>29</b>	<b>31</b>
<b>Total ELS and LS cotton production</b>	<b>2</b>	<b>1</b>	<b>2</b>
<b>Total cotton production under Identity programs</b>	<b>25</b>	<b>28</b>	<b>29</b>
<b>Leading ELS and LS cotton producers</b>			
- United States	0.5	0.3	0.4
- Egypt	0.3	0.3	0.5
- India	0.3	0.3	0.4
- China	0.3	0.2	0.3
<b>Leading Identity Programs</b>			
BCI and Equivalents	20.4	22.0	20.2
- Responsible Brazilian Cotton (ABR) Program (Brazil)	8.0	8.0	10.5
myBMP (Australia) (total)	1.7	1.6	1.7
Cotton Made in Africa	2.8	2.9	2.1
Organic cotton as reported by Textile Exchange	1.4	1.4	1.4
The e3 Sustainable Cotton Programme by BASF	0.9	1.0	1.1
REEL cotton program	0.8	0.6	0.9
US cotton Trust Protocol	1.0	1.5	1.4







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# **LONG STAPLE AND EXTRA LONG STAPLE VARIETIES OF COTTON**



## **WORLD LEVEL**

**Long Staple (LS) and Extra Long Staple (ELS) cotton form only a small section of global cotton lint production, comprising on average around 2% of total world production. Over the years, the production of ELS and LS cotton has declined due to their limited demand and specific production needs. The definitions of LS and ELS cotton are not globally standardized, and each producing and consuming country has its own standards to define ELS and LS cotton. Global trade for these types of cotton is usually conducted using internationally unharmonized HS codes, which makes demand, supply, and trade analysis a difficult task. It is often seen that exporting countries consider a consignment as long staple (based on their national definition); however, the same consignment is considered extra-long staple by the importing country (based on their national definition).**

**In the 2022/23 season, the ELS and LS cotton lint production increased by 46%, mainly due to an increase in the area under ELS and LS cotton. Almost all the leading producers recorded an increase in ELS and LS cotton production, led by Egypt, whose production increased by 57% compared to the previous season.**







**Egypt owes its increase in production to increased prices for cotton in 2021 up until mid-2022. The setting up of a new cotton marketing system in 2019, which aims to encourage cotton cultivation by announcing guaranteed prices for each season at the beginning of the season, also contributed to this increase by reducing uncertainty in the market.**

**Egypt was followed by India and the United States, which recorded increases of 27% and 42%, respectively. While the Indian government had given an impetus to the ELS cotton market both in terms of domestic production and consumption, with special consideration given to ELS cotton in the country's 2023 financial budget, high prices in the United States drove an increased area planted in the 2022/23 season despite a water shortage in California, its main ELS cotton cultivating state. More information on country-wise production is covered under the by-country analysis.**

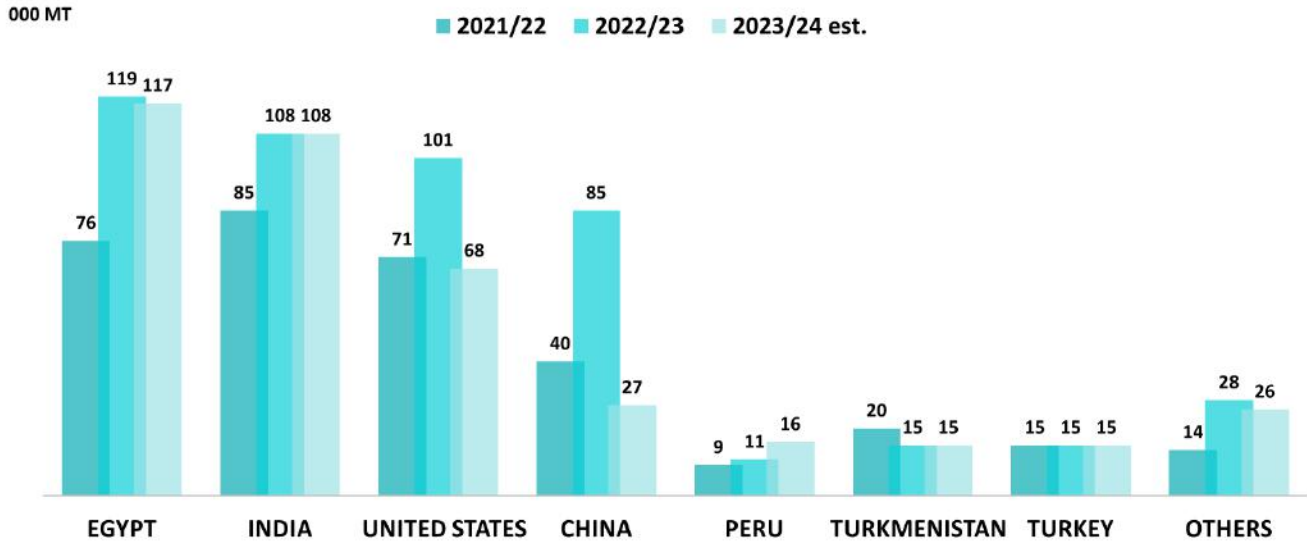
**Overall, 2022/23 was a good season for ELS and LS cotton production. Based on the market sentiment and the sown area under cotton, it is projected that for the 2023/24 season, the ELS and LS production will be around 387,000 tonnes lower than the 2022/23 season, with production led by Egypt, followed by India and the USA.**







### Leading ELS and LS producers



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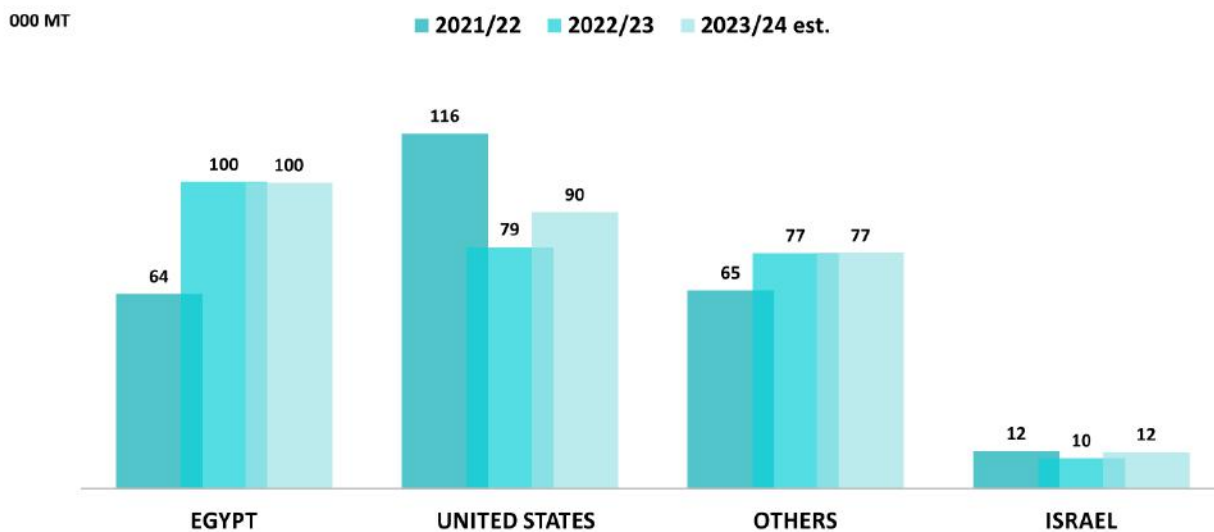
### World leading ELS and LS consumers



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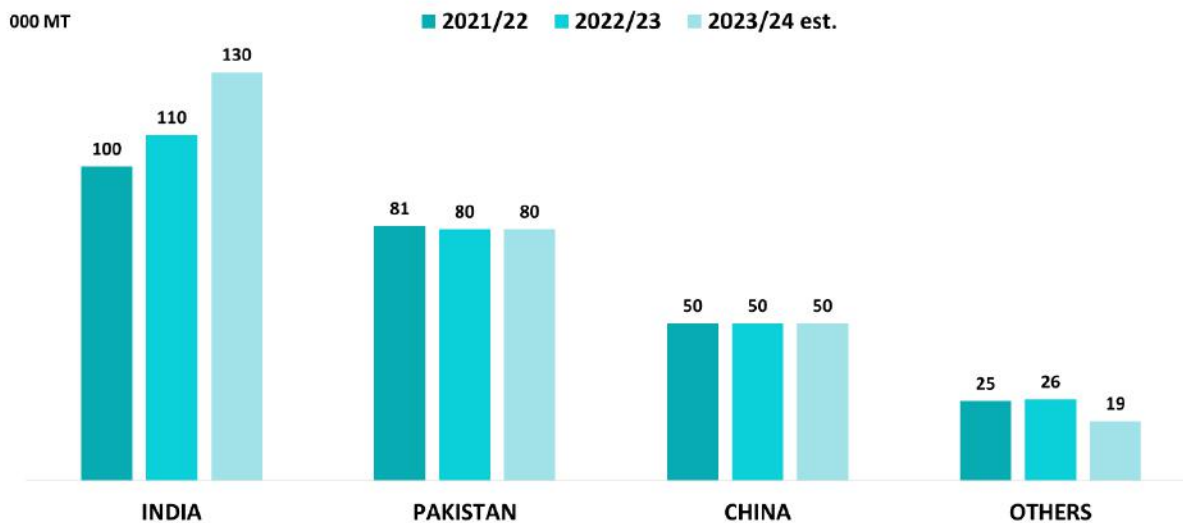


### Leading ELS and LS exporters



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### Leading ELS and LS importers



[www.icac.org](http://www.icac.org)



<b>LONG AND EXTRA LONG STAPLE COTTON</b>				
<b>Aug- July Approximately</b>				
<b>000 MT</b>				
	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24 est.</b>
<b>BEGINNING STOCK</b>				
CHINA LS/ELS	118	108	78	103
EGYPT ELS	5	3	4	4
EGYPT LS	43	28	38	54
INDIA	50	63	33	16
ISRAEL	9	10	2	9
PAKISTAN ELS	0	1	1	2
PAKISTAN LS	0	17	25	32
PERU	2	4	5	4
TURKEY	9	16	17	20
UNITED STATES	150	85	39	59
OTHERS	9	13	12	9
<b>TOTAL</b>	<b>395</b>	<b>348</b>	<b>254</b>	<b>313</b>
<b>PRODUCTION</b>				
CHINA LS/ELS	65	40	85	27
EGYPT ELS	3	4	7	7
EGYPT LS	70	72	112	110
INDIA	85	85	108	108
ISRAEL	6	5	17	14
PERU	6	9	11	16
TURKMENISTAN	20	20	15	15
TURKEY	17	15	15	15
UNITED STATES	117	71	101	68
UZBEKISTAN	1	4	4	4
OTHERS	0	1	1	1
<b>TOTAL</b>	<b>390</b>	<b>326</b>	<b>475</b>	<b>384</b>





<b>CONSUMPTION</b>				
BANGLADESH	10	4	7	2
CHINA LS/ELS	125	120	110	80
INDIA	171	190	215	217
PAKISTAN ELS	3	6	5	5
PAKISTAN LS	70	68	68	68
PERU	15	20	15	16
TURKMENISTAN	23	21	16	16
TURKEY	15	15	15	15
VIETNAM	14	9	9	5
OTHERS	11	6	13	13
<b>TOTAL</b>	<b>456</b>	<b>458</b>	<b>472</b>	<b>436</b>
<b>EXPORTS</b>				
EGYPT ELS	5	3	6	6
EGYPT LS	84	61	94	94
ISRAEL	5	12	10	12
UNITED STATES	179	116	79	90
OTHERS	32	65	77	77
<b>TOTAL</b>	<b>304</b>	<b>257</b>	<b>266</b>	<b>279</b>
<b>IMPORTS</b>				
BANGLADESH	13	5	5	3
CHINA LS/ELS	50	50	50	50
INDIA	112	100	110	130
PAKISTAN ELS	3	6	5	5
PAKISTAN LS	87	75	75	75
PERU	10	13	3	3
VIETNAM	17	8	9	4
OTHERS	11	0	9	9
<b>TOTAL</b>	<b>304</b>	<b>257</b>	<b>266</b>	<b>279</b>



## ELS AND LS ANALYSIS BY COUNTRY

### EGYPT

In 2023, Egypt faced multiple economic challenges, including energy and food crises fueled by the Russia and Ukraine conflict, conflicts at the Red Sea which impacted their shipments, pandemic-related slowdowns, among others. However, the ELS and LS cotton market performed comparatively well.

Egypt recorded an increase of 57% in its ELS and LS cotton production in the 2022/23 season. As mentioned before, Egypt owes its incredible increase in production to the setting up of a new cotton marketing system in 2019, which aims to encourage cotton cultivation by announcing a guaranteed price for each season at the beginning of the season. The prices offered for ELS and LS were high, promoting increased area under cotton for the 2022/23 season.

CATEGORY		NEW NAME
EXTRA LONG STAPLE COTTON	EXTRA LONG-EXTRA FINE	Extra Giza 45
		Extra Giza 87
		Extra Giza 93
	EXTRA LONG	Extra Giza 96
	EXTRA STRENGTH	Extra Giza 92
LONG STAPLE COTTON	LOWER	Super Giza 86
	(DELTA REGION)	Super Giza 94
		Super Giza 97
	UPPER (UPPER EGYPT)	Giza 95
	Giza 98	



Taking into consideration the comparatively lower offered prices and market sentiments, it is estimated that the production of ELS and LS cotton for the 2023/24 season will be around 2% lower than the previous season.

Government intervention has played a very important role in providing a fresh boost to Egypt's cotton lint production. The new cotton marketing system, launched in 2019, is governed by Egypt's Ministry of Agriculture, Ministry of Public Business Sector, CATGO, Agriculture Bank of Egypt, chairman of the general committee of cotton trade regulation in Egypt, and representatives of cotton trading companies. The system encourages cotton cultivation by ensuring guaranteed prices. These prices are based on public bidding, which sets the auction opening price linked to international cotton prices and adds a price premium according to the quality of cotton. These prices are announced ahead of cultivation, which has provided a major boost to cotton production.

### **Trade**

Egypt has very limited capacity to consume ELS and LS cotton and mostly produces it for export purposes. In the 2022/23 season, Egypt was the largest exporter of ELS and LS cotton. Its exports were up by 58% compared to the previous season due to increased production and are estimated to remain around the same level for the 2023/24 season.





In terms of exports by variety, around 94% of its total ELS and LS exports are of long staple cotton. Extra Giza 94, which is a long staple variety of cotton, is the highest exported variety of cotton and comprises around 77.5% of total ELS and LS exports from Egypt, followed by Extra Giza 86 and Giza 95, both long staple varieties of cotton.

In terms of countries, Egypt exports around 50% of its total ELS and LS cotton to India. Cotton is the third-largest exported commodity from Egypt to India. Both countries are long-time trade partners in cotton and have had a bilateral trade agreement since March 1978 based on a most-favored-nation clause.

#### **Definition and Characteristics**

To facilitate and add clarity to the process of handling and marketing Egyptian cotton, especially in global markets, the government decided to introduce new category names for the various staple lengths according to law no. 206. Extra-long staple varieties (including Giza 45, 87, 93, and 96) and extra-strength varieties (including Giza 92) and newly developed strains will be known as Extra Giza. Long staple cotton, including Giza 94, 86, and 97, are renamed as Super Giza. Giza 95 and 98 will still be marketed under the name of Giza.

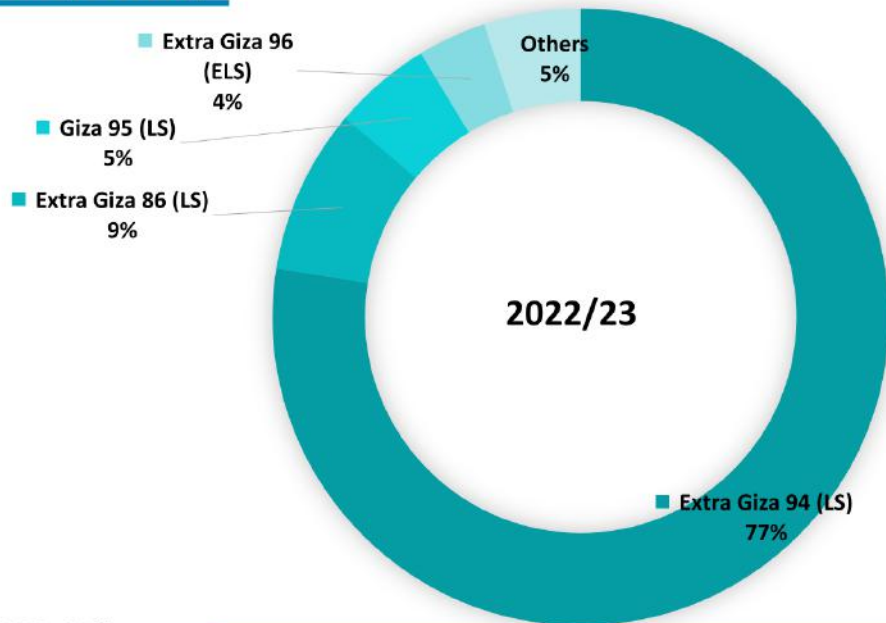




Characteristics of Egyptian Cotton Varieties season 2023/2024 until 20 March 2024(Average results)

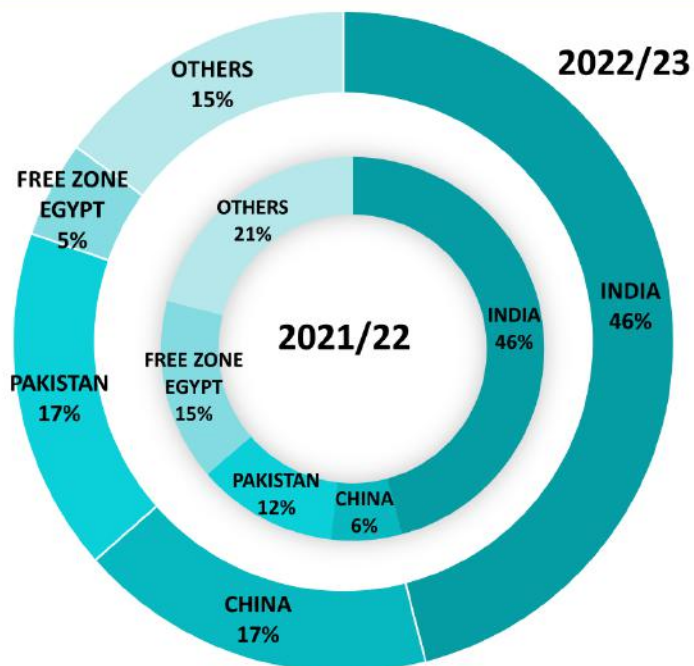
		Extra Giza				Super Giza			Giza	
		Extra Strength	Extra Long – Extra Fine		Extra Long					
Varieties Properties		Extra Giza 92	Extra Giza 45	Extra Giza 87	Extra Giza 96	Super Giza 86	Super Giza 94	Super Giza 97	Giza 95	Giza 98
Upper half mean length	U.H.M.L (mm)	33.79	35.12	36.80	36.02	33.12	34.49	33.66	29.30	31.45
Uniformity	(%)	87.5	87.2	89.3	88.3	87.1	87.3	86.4	83.3	85.9
Short fiber Index	(%)	5.7	5.5	5.4	5.4	5.9	5.6	5.8	7.9	7.2
Strength	(gram/tex)	46.2	42.1	42.1	45.9	44.8	41.1	43.1	36.4	36.9
Micronaire Reading		3.48	2.94	3.25	3.97	4.55	3.84	4.08	4.16	4.14
Reflectance degree	Rd	76.9	72.0	72.2	74.7	74.1	75.0	74.5	67.8	67.3
Yellowness degree	+b	8.6	9.2	9.0	9.2	9.0	9.1	9.1	12.0	12.5
Spinning Consistency Index	SCI	221	211	222	222	202	201	199	155	171
Percent of maturity	(%)	79	83	87	82	84	82	82	84	86
Fineness	(Militex)	139	124	115	152	164	152	153	154	157
Trash	(%)	3.8	4.8	4.1	3.0	3.9	3.7	3.5	3.8	3.5
Neps Count	Nep/gram	175	207	227	135	133	169	154	138	158

### Egypt's exports by variety





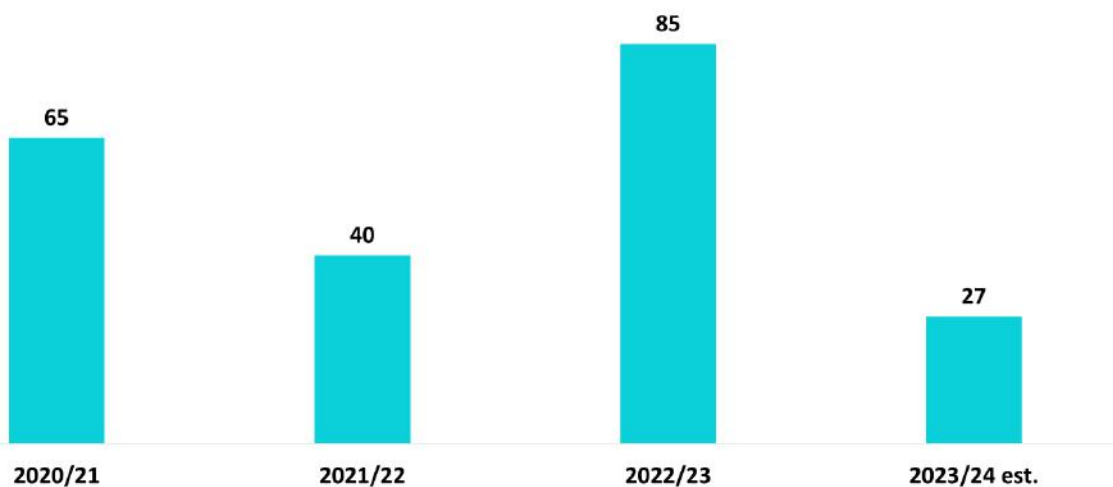
### Egypt's exports by country



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### China ELS and LS cotton production

000 MT



[www.icac.org](http://www.icac.org)





## **CHINA**

China's ELS and LS cotton lint production is estimated to fall by 64% in 2023/24 due to poor conditions for growing cotton and dramatic fall in prices for ELS and LS cotton in the 2022/23 season. It is currently estimated to be around 27,000 tonnes, the lowest in the last few seasons. Some of the area under cotton was also resown due to poor weather conditions. Even consumption of ELS and LS cotton is estimated to fall by 27% in the 2023/24 season. It is expected that the production will recover by next season as the price for ELS and LS cotton have revived from the past year; however, it is still lower than the historical levels.

## **INDIA**

India is a major market for ELS and LS cotton production and consumption. Total production of ELS and LS cotton in India in the 2022/23 season was about 108,000 tonnes, the second highest in the world, 27% higher than the previous season, and comprising 0.4% of total world cotton production. Production is projected to remain the same in the 2023/24 season.

The increase is attributed to a special status and increased investments by the Indian government into the ELS and LS cotton market production and domestic consumption to produce ELS and LS cotton-based textile products. ELS cotton also received a special mention in the 2023 financial budget, and five new HS lines were created to cover the LS and ELS trade.



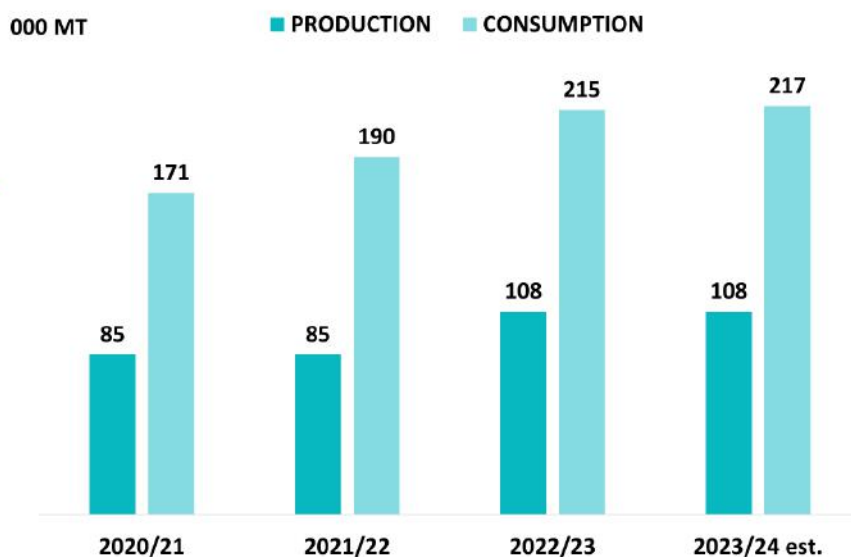
Domestic demand for ELS and LS cotton outpaces the production levels in India; therefore, it relies on imports of the same. The imports in the 2022/23 season were 10% higher than the previous season and are expected to be further 18% higher in the 2023/24 season. Earlier this year, in February 2024, the Indian government also removed the import duty on cotton that exceeds the length of 32 mm. India sources most of its ELS and LS cotton from Egypt and the United States.

Every year at the beginning of the cotton season, the Commission for Agriculture Costs and Prices (CACP) announces the Minimum Support Price (MSP) for cotton, to give incentive to the cotton growers. In terms of staple length and for fixing the MSP, India generally considers medium staple length cotton with a staple length of 24.5 mm to 25.5 mm and a micronaire value of 4.3 to 5.1, and long staple length cotton with a staple length of 29.5 mm to 30.5 mm and a micronaire value of 3.5 to 4.3. For the 2023/24 cotton season, the MSP for medium staple length cotton has been fixed at Rs. 6620/- per quintal, and for long staple at Rs. 7020/- per quintal (<https://texmin.nic.in/sites/default/files/Annexure-VII-Note%20on%20Cotton%20Sector.pdf>).





**India's ELS and  
LS cotton  
production and  
consumption**



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## ISRAEL

Israel's cotton production in the 2022/23 season was 17,000 tonnes, but it is expected to slightly decrease to 14,000 tonnes in 2023/24. Israel defines its extra-long staple cotton as having a staple length between 39 mm to 42 mm, with long staple cotton having a staple length between 36 mm and 40 mm. Israel mostly exports its cotton.

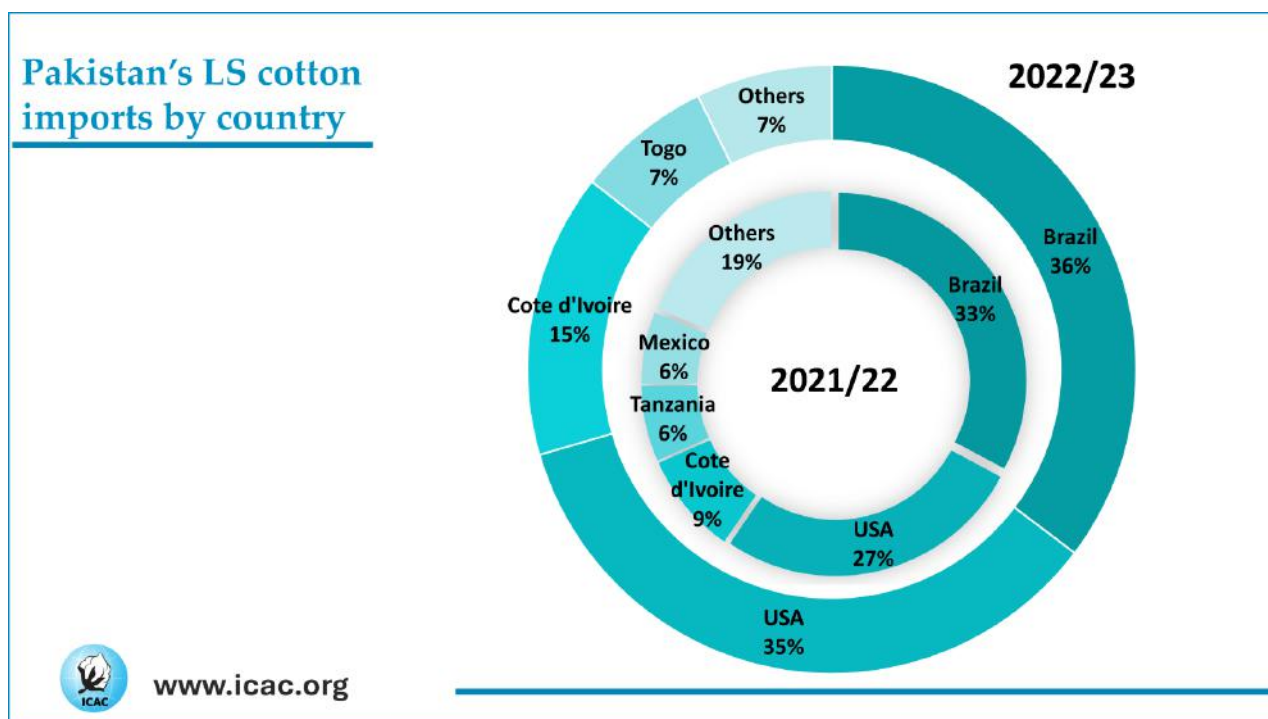
Type	Length (mm)	Fineness (Micronaire)	Strength (GPT)
Israeli ELS	39 - 42	3.7 – 4.5	43 +
Israeli LS (Acalpi)	36 - 40	3.4 – 4.2	36 +



## PAKISTAN

Pakistan is one of the world’s leading consumers and importers of ELS and LS cotton. Pakistan consumed 73,000 tonnes of ELS and LS cotton in the 2022/23 season and is expected to maintain that level of consumption in the 2023/24 season as well.

Pakistan defines the extra-long staple variety of cotton as having a staple length exceeding 31 mm, and it defines long staple cotton as having a staple length exceeding 28.5 mm but not exceeding 31 mm. Pakistan meets its domestic consumption needs through imports and mostly sources ELS cotton from Egypt and the US. Long staple cotton is most heavily sourced from Brazil, the United States, and Côte d’Ivoire.







## **UNITED STATES**

All production reported for the United States in this report is of ELS (Pima) cotton. US Pima cotton production has been fluctuating in the last few seasons. In the 2022/23 season, it increased by 42%; however, it recorded a fall of 33% in the 2023/24 season. It is currently projected to rebound and increase in the 2024/25 season. The fluctuations in Pima cotton production are mainly caused by weather conditions in California (its highest Pima cotton growing state) and changes in prices. California is considered to have the best conditions for Pima cotton production.

High prices drove increased area planted in 2022/23, despite a water shortage in California. In 2023/24, prices declined, and there was a shortened season that discouraged producers from planting Pima. Pima production in 2024/25 is forecasted to be without these outliers, leading to a rebound in the California area planted under Pima cotton, as reported by the National Agricultural Statistics Service (NASS) acreage report.

In terms of yields, ELS cotton experiences a higher yield than upland cotton, mainly because ELS cotton is irrigated while much of upland production is not. Even after experiencing fluctuations in production, the US continued to remain a leading producer and exporter of ELS cotton in the world.

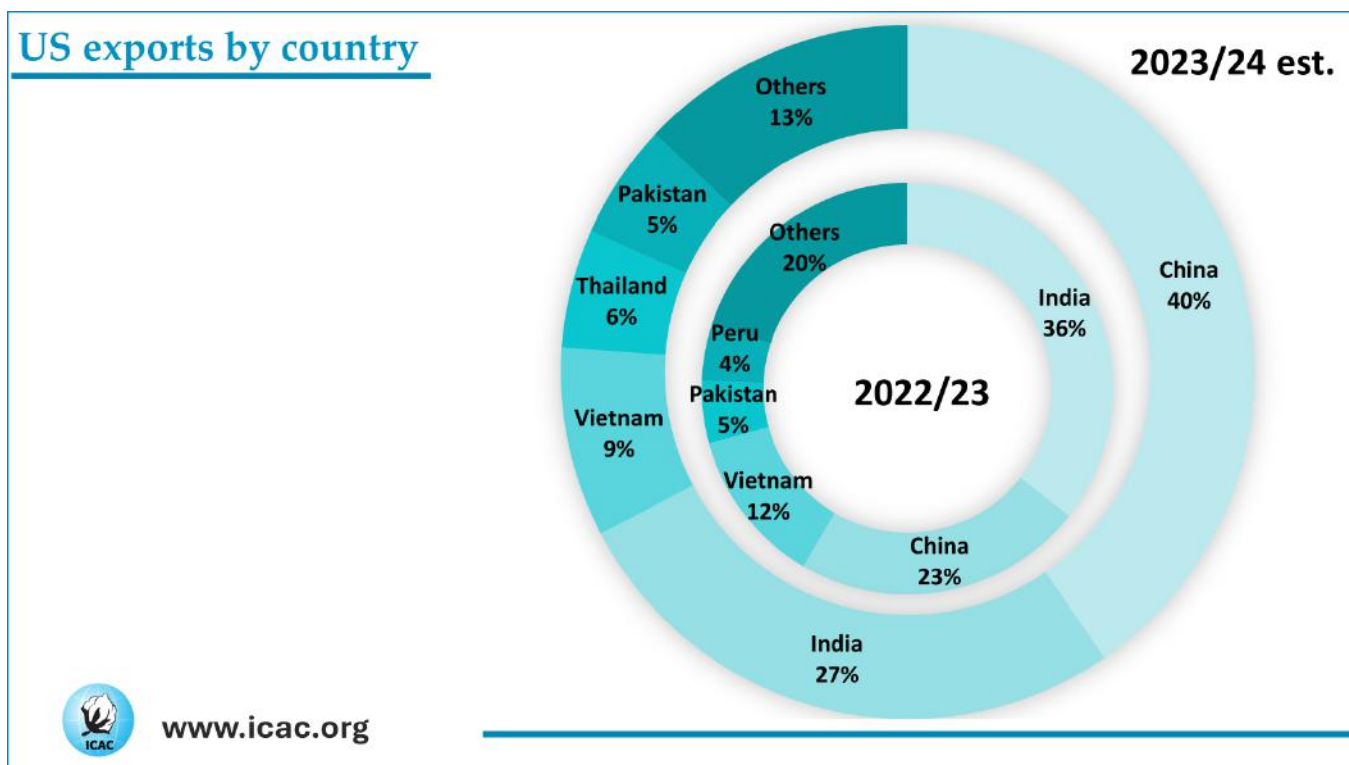




By country, the US exports most of its ELS cotton to India, China, and Vietnam, together comprising around 70-80% of the USA's total ELS exports. Additionally, US Pima exports have also fallen to Peru in the last two seasons, due to a combination of lower supplies of Pima and lower demand for cotton in Peru.

There are three USDA programs that support ELS cotton:-

1. Federal crop insurance program (RMA)
2. Marketing assistance loan program (FSA)
3. ELS competitiveness payment program (AMS)







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## **OTHER PLAYERS**

**Turkmenistan's ELS and LS cotton production is estimated to be around 15,000 tonnes in the 2023/24 season, with most consumed domestically as usual. Turkey also consumed about 15,000 tonnes of ELS and LS cotton in the same season. It consumes most of its domestic production and also sources small amounts of ELS cotton from the US.**

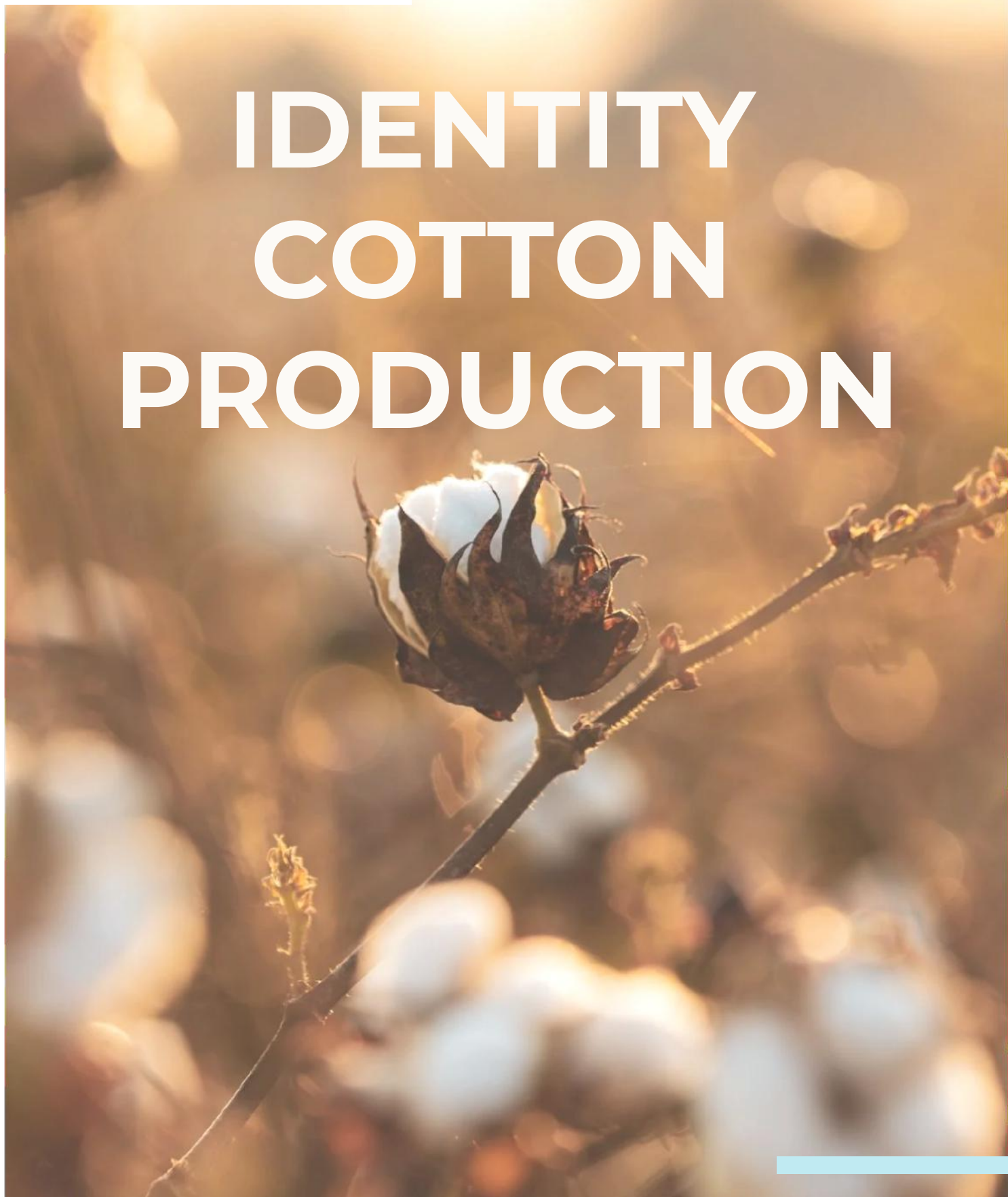
**Peru is estimated to produce around 16,000 tonnes of ELS and LS cotton in the 2023/24 season, 48% more than the previous season. In Peru, about 70% of production is of the LS Tanguis variety. Peru imports 99% of its total cotton from the United States, including all its ELS and LS varieties of cotton.**





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# IDENTITY COTTON PRODUCTION







## COTTON PRODUCTION UNDER IDENTITY PROGRAMS

Cotton production under Identity Programs has been increasing in recent years. Production in the 2021/22 season was 14% higher, reaching 7 million tonnes. In the 2022/23 season, it is around the same level. The increase in identity program certifications stems from consumer demand for sustainable and traceable cotton.

In the 2022/23 season, all the identity programs together comprised around 29% of total world cotton production. BCI and its equivalents are the largest identity programs in the world, representing around 69% of total cotton under identity programs. BCI and its equivalents are followed by Cotton Made in Africa, the U.S. Cotton Trust Protocol, and Organic Cotton as reported by Textile Exchange, among others.

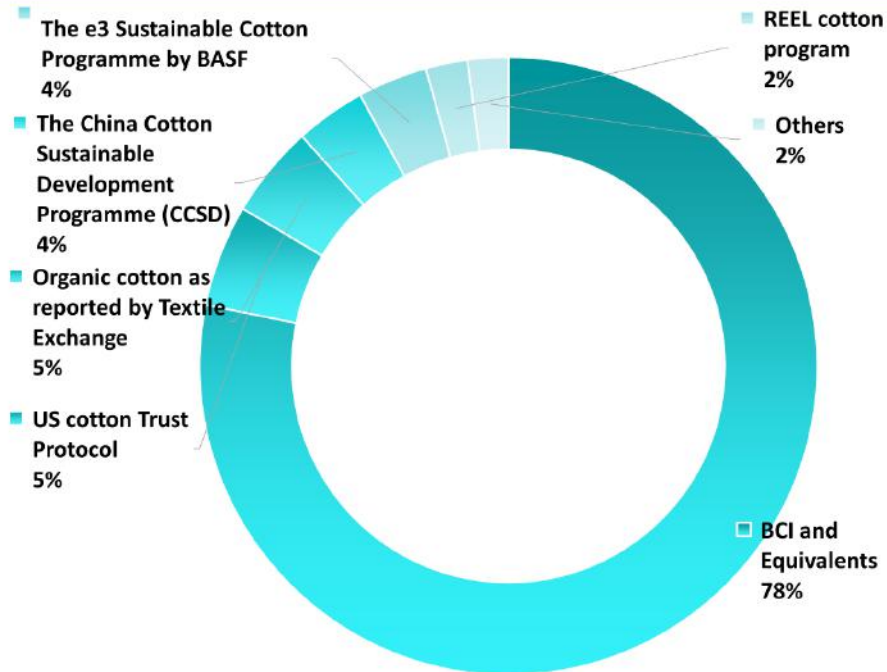
WORLD COTTON LINT PRODUCTION UNDER IDENTITY PROGRAMS					
000 MT					
	2018/19	2019/20	2020/21	2021/22	2022/23
Total production under Identity programs	6276	6891	6171	7065	7059
BCI and Equivalents	5798	6087	5021	5523	4937
- BCI with out equivalents	2924	3083	1935	2363	1888
- Responsible Brazilian Cotton (ABR) Program (Brazil)	2170	2334	1970	2003	2550
- myBMP (Australia) (equivalent to BCI)	92	31	141	381	381
- ICPSS (Israel)	9	9	6	5	17
- Agro-2 (Greece)			23	54	101
myBMP (Australia) (total)	103	31	410	410	420
Climate Beneficial Cotton			0.10	0.30	0.30*
Cotton Made in Africa	593	630	677	716	508
The China Cotton Sustainable Development Programme (CCSD)	0	0	0	260	260
International Sustainability and Carbon Certification (ISCC)	137	133	148	129	129*
Organic cotton as reported by Textile Exchange	240	249	342	342	342*
The e3 Sustainable Cotton Programme by BASF	23	161	215	258	258*
Fairtrade cotton	17	16	18	18	18*
REEL cotton program	61	140	187	155	219
Regenerative Organic Alliance		0	0	2	2*
US cotton Trust Protocol		105	240	376	346

All figures are approximates based on collected data.

\* Assumed equal to the last season.

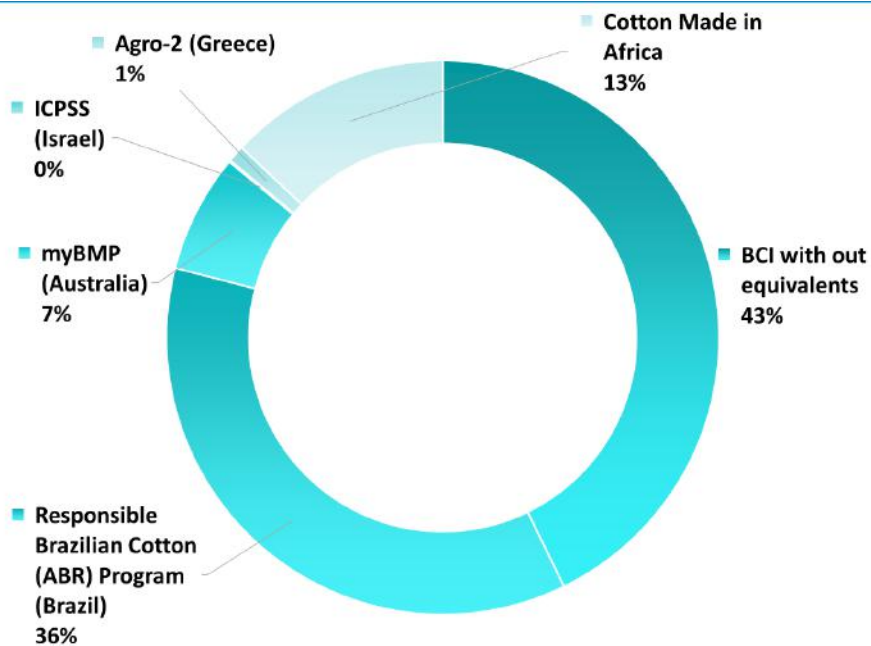


### Production under leading Identity Programs 2021/22



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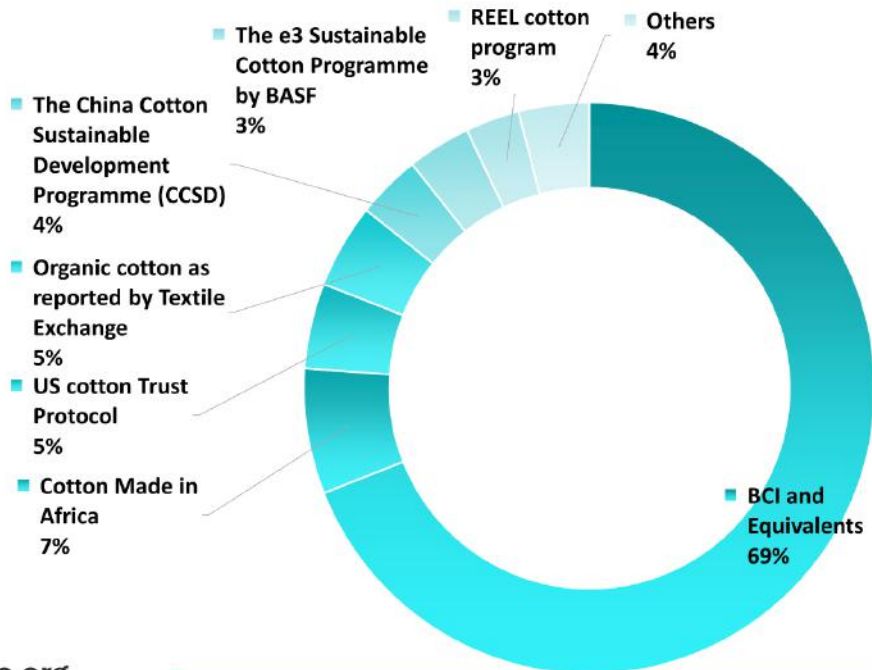
### Production under BCI and Equivalents 2021/22



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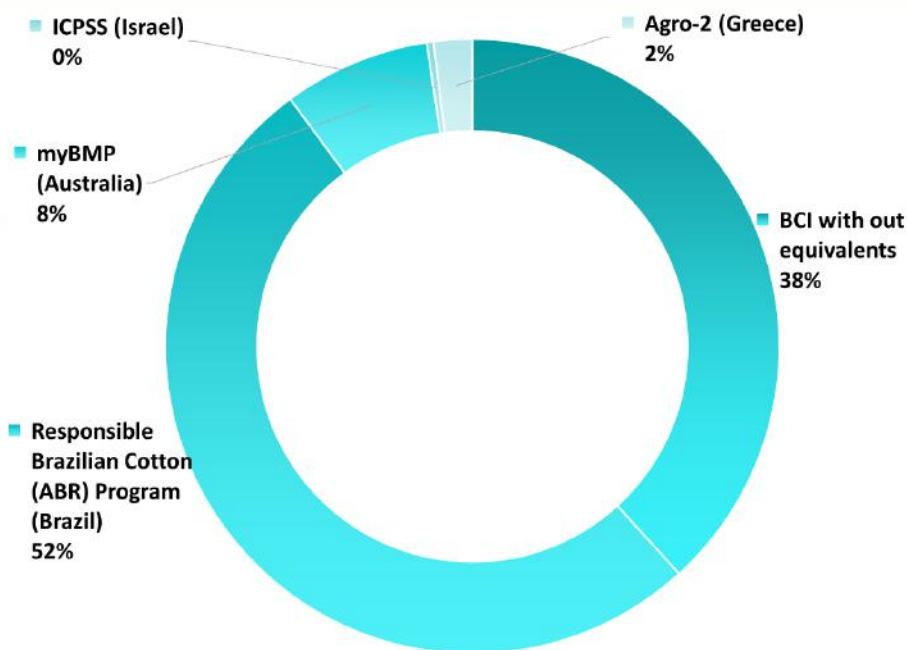


### Production under leading Identity Programs 2022/23



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### Production under BCI and Equivalents 2022/23



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## **BCI AND EQUIVALENTS**

BCI and equivalents represent around 20.2% of total world cotton production. In the 2022/23 season, production under BCI and equivalents reduced by 11%, mostly due to the separation of Cotton Made in Africa from BCI and equivalents.

While the total figures from BCI and equivalents reported a decrease, many BCI equivalents programs reported an increase in production in the season. For example, the Responsible Brazilian Cotton (ABR) Program (Brazil) reported a 27% increase in production, mostly due to exceptional yield and overall increase in cotton lint production in Brazil. Even the myBMP (Australia), the ICPSS (Israel), and Agro-2 (Greece) reported increases in production in the same season.

More farmers joined the Better Cotton program in the 2022/23 season in Australia and Greece, which contributed to an increase in BCI-certified production from these regions. In Israel, there was an increase in producer units from 39 to 80 (as reported by BCI), which increased its overall domestic production, and the same trend was followed by the Better Cotton certified production.

Some regions also reported a decrease in production. Pakistan suffered devastating floods in the 2022 season, which led to a 63% fall in its BCI-certified cotton production. Mali suffered jassid pest infestation, leading to reduced yield and decreased production from the country. cotton SA and Better Cotton jointly announced the temporary suspension of the Better Cotton Programme in South Africa in 2023, which resulted in an 80% fall in BCI-certified cotton production from the South Africa region.



<b>BCI</b>					
<b>Lint Production (tonnes)</b>					
<b>Country</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>
Australia	91,784	31,413	141,437	381,416	381,401
Brazil	2,170,000	2,334,000	1,970,073	2,003,371	2,550,000
China	908,000	769,597	92,430	99,307	99,355
Egypt			1,221	2,413	2,755
Greece			22,741	54,256	100,549
India	652,000	1,022,163	829,508	863,480	919,193
Israel	9,000	8,730	5,708	5,166	17,303
Kazakhstan	2,000	2,905	3,527	4,059	
Madagascar	700	-			
Mali	65,000	23,408	8,441	174,726	109,293
Mozambique	10,000	6,352	9,898	6,617	7,186
Pakistan	906,000	943,515	681,939	817,840	305,620
South Africa	18,000	11,473	10,002	7,907	1,617
Tajikistan	12,000	12,633	13,539	13,446	14,783
Turkey	53,000	102,516	67,174	67,381	104,885
USA	309,000	240,192	217,147	305,440	307,942
Uzbekistan					15,480
CMIA	593,068	578,000	677,479	716,397	
<b>Total</b>	<b>5,799,552</b>	<b>6,086,897</b>	<b>4,752,264</b>	<b>5,523,222</b>	<b>4,937,362</b>

Source: approximate calculations based of data collected from BCI





## **RESPONSIBLE BRAZILIAN COTTON (ABR) PROGRAM**

The ABR program certification is equivalent to the Better Cotton Initiative (BCI) certification. In the 2022/23 season, the ABR program alone accounted for 10.5% of total world cotton production. Additionally, it accounts for more than 50% of total production under BCI and its equivalents. Production under the ABR program increased by 27% in the 2022/23 season compared to the previous season. The main reason for this increase was the rise in cotton yields, subsequent production, and the elevated levels of production certified by the ABR program.

## **COTTON MADE IN AFRICA**

Cotton lint production under the Cotton Made in Africa program represented around 2.1% of total world cotton production and 7% of total production under identity programs in the 2022/23 season. However, production under CmiA in the 2022/23 season fell by 29% due to reduced production in almost all the regions under CmiA.

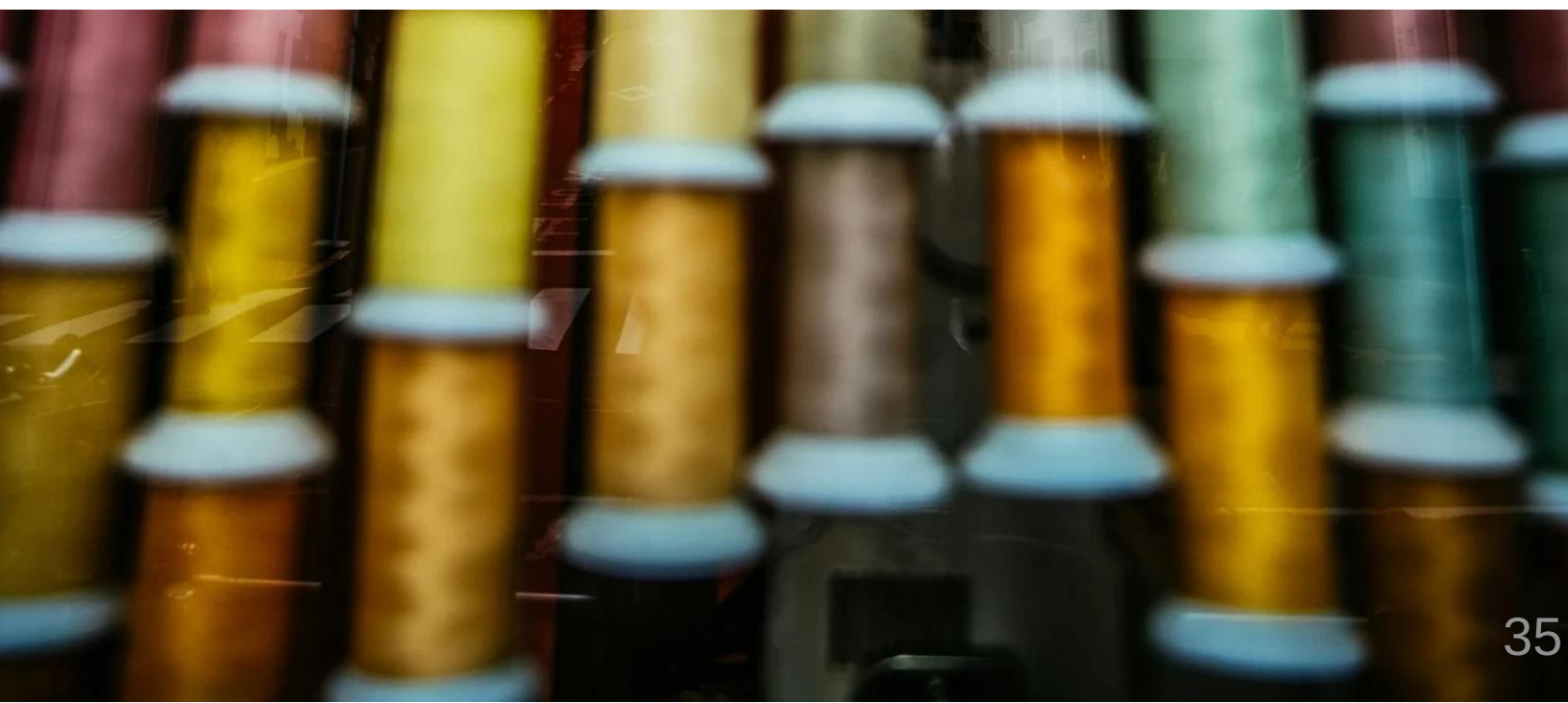
The African production regions experienced extreme pest infestations of cotton jassids. This led to a decrease in cotton certified by CmiA from Benin, Burkina Faso, Cameroon, Chad, and Côte d'Ivoire, among others. While almost all the producing countries recorded a decrease, CmiA-certified cotton from Tanzania increased by 59% and from Zambia increased by 64%, mainly because of an increase in the number of farmers participating under CmiA.





<b>COTTON MADE IN AFRICA (CmIA)</b>					
<b>Lint Production (tonnes) by country</b>					
	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>
<b>Benin</b>	<b>14,388</b>	<b>12,407</b>	<b>14,780</b>	<b>55,411</b>	<b>27873</b>
<b>Burkina Faso</b>	<b>184,191</b>	<b>173,893</b>	<b>196,300</b>	<b>200,781</b>	<b>159172</b>
<b>Cameroon</b>	<b>132,990</b>	<b>138,585</b>	<b>146,157</b>	<b>136,000</b>	<b>128155</b>
<b>Chad</b>		<b>48,821</b>	<b>50,533</b>	<b>58,482</b>	<b>41289</b>
<b>Côte d'Ivoire</b>	<b>194,474</b>	<b>213,212</b>	<b>237,400</b>	<b>225,033</b>	<b>99969</b>
<b>Ethiopia</b>	<b>11,978</b>				
<b>Ghana</b>	<b>792</b>				
<b>Mozambique</b>	<b>12,046</b>	<b>5,437</b>	<b>12,088</b>	<b>3,650</b>	<b>3648</b>
<b>Nigeria</b>	<b>1,351</b>	<b>13,211</b>	<b>1,598</b>	<b>735</b>	<b>581</b>
<b>Tanzania</b>	<b>15,246</b>	<b>3,397</b>	<b>8,290</b>	<b>6,162</b>	<b>9789</b>
<b>Togo</b>				<b>22,008</b>	<b>19491</b>
<b>Uganda</b>	<b>1,333</b>	<b>3,200</b>	<b>1,950</b>		<b>4870</b>
<b>Zambia</b>	<b>24,279</b>	<b>17,626</b>	<b>8,383</b>	<b>8,135</b>	<b>13308</b>
<b>Total</b>	<b>593,068</b>	<b>629,789</b>	<b>677,479</b>	<b>716,397</b>	<b>508,145</b>

Source:- approximate calculations based of data collected from CmIA





## **MY BEST MANAGEMENT PRACTICES PROGRAM (MYBMP) (AUSTRALIA)**

The ‘my Best Management Practices’ program is a voluntary farm and environmental management system that provides self-assessment mechanisms, practical tools, and auditing processes to ensure that Australian cotton is produced according to best practices.

Production under the myBMP has increased over the past years to reach around 490,000 tonnes in the 2023/24 season. It is expected to increase further in the next season. While myBMP is BCI equivalent, not all farmers under myBMP choose to go through BCI certification. That is why the total myBMP figures are reported separately from BCI and equivalents. Production also certified by BCI is mentioned under BCI and Equivalent figures.

<b>myBMP Program Lint Production (tonnes)</b>						
<b>Country</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24</b>
<b>As certified by myBMP</b>	<b>102,721</b>	<b>31,411</b>	<b>410,075</b>	<b>410,000</b>	<b>420000</b>	<b>490,000</b>

Source:- data compiled by ICAC based on data collected from myBMP



## REEL COTTON PROGRAM

Cotton production under the REEL cotton program in the 2022/23 season increased by 41% to reach 219,000 tonnes, comprising almost 1% of total world production. The major reason for the increase in production under the REEL program is the rapid expansion and more enrollments in the program in India and Bangladesh, which led to increased production in India and Bangladesh by 133% and 57%, respectively.

In contrast, production in Pakistan under REEL reduced in the same season because of the 2022 floods that negatively impacted cotton production in this region. The REEL Cotton Programme is a flagship three-year agricultural training program by CottonConnect for sustainable cotton production.

REEL COTTON PROGRAM					
Lint Production (tonnes)					
Country	2018/19	2019/20	2020/21	2021/22	2022/23
Bangladesh		443	999	2,861	4,490
India	16,086	79,040	105,349	79,043	184,135
Pakistan	43,152	52,801	52,891	43,601	19,012
China	1,748	7,783	27,350	29,944	11,735
Egypt					71
<b>TOTAL</b>	<b>60,986</b>	<b>140,067</b>	<b>186,589</b>	<b>155,449</b>	<b>219,443</b>

Source:- data compiled by ICAC based on data collected from REEL cotton



## **UNITED STATES COTTON TRUST PROTOCOL (USCTP)**

The cotton lint production in the 2022/23 season was 8% lower at 346,000 tonnes due to the drought in Texas, which caused a drop in production. USCTP also changed the timing of enrollment between the two years, and that change limited the growth in new producers for that year. However, for 2023/24, production under USCTP is estimated to rebound by 24% to reach 429,000 tonnes. For 2023/24, we saw a significant increase in enrollment due to the ability to offer some incentives through a USDA Climate Smart grant. The increased enrollment was enough to counter the impacts of a second year of drought in the Southwest region of the USA. The total production under USCTP currently amounts to around 1.4% of total world cotton production.

The U.S. Cotton Trust Protocol is the voluntary sustainability program for U.S. cotton growers and the traceability platform for all U.S. Cotton. The Trust Protocol's mission is to bring quantifiable and verifiable goals and measurements to U.S. cotton production's key sustainability metrics of land use, soil loss, water reduction, soil carbon, greenhouse gas emissions, and energy use.

<b>US COTTON TRUST PROTOCOL</b>						
<b>Lint Production (tonnes)</b>						
<b>Country</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>2023/24 est.</b>
<b>USA</b>		<b>104669</b>	<b>240133</b>	<b>376,451</b>	<b>346,423</b>	<b>428,575</b>

Source:- data compiled by ICAC based on data collected from USCTP