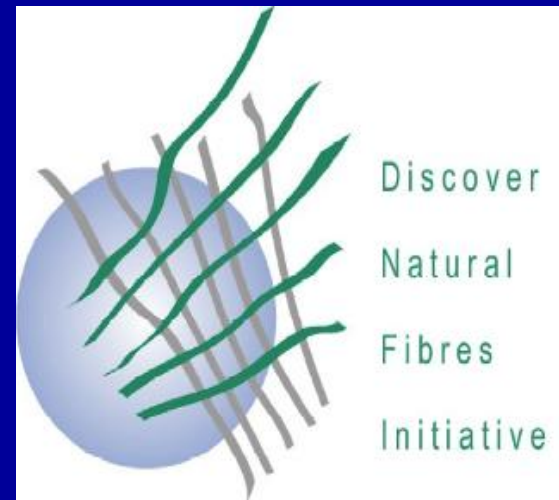
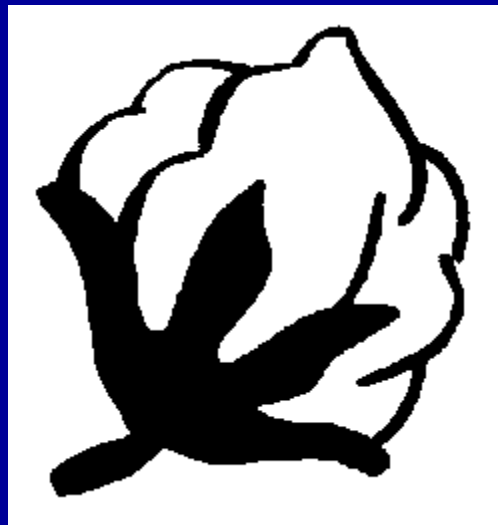


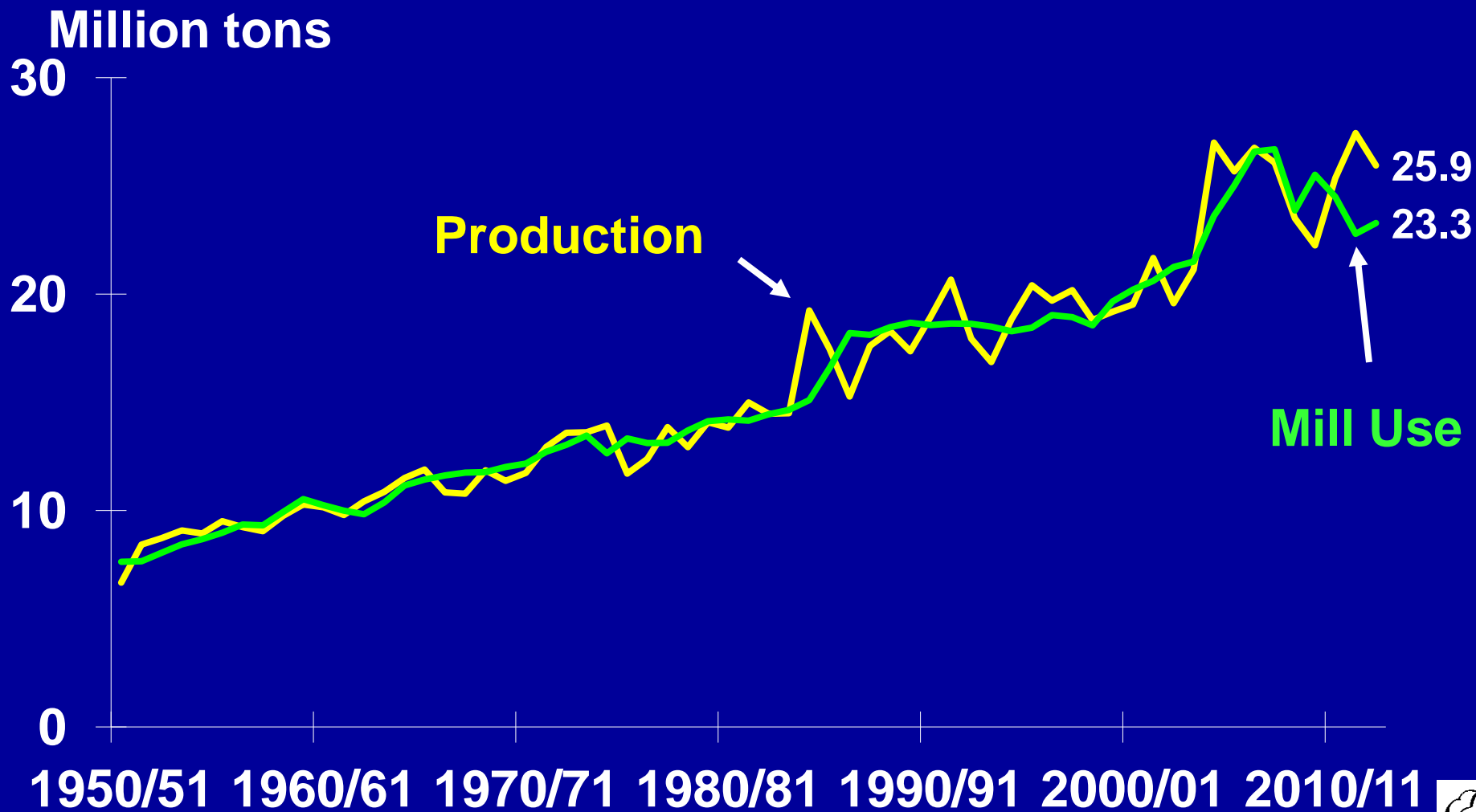
Trends in the Global Cotton Market: Where Does Africa Stand?



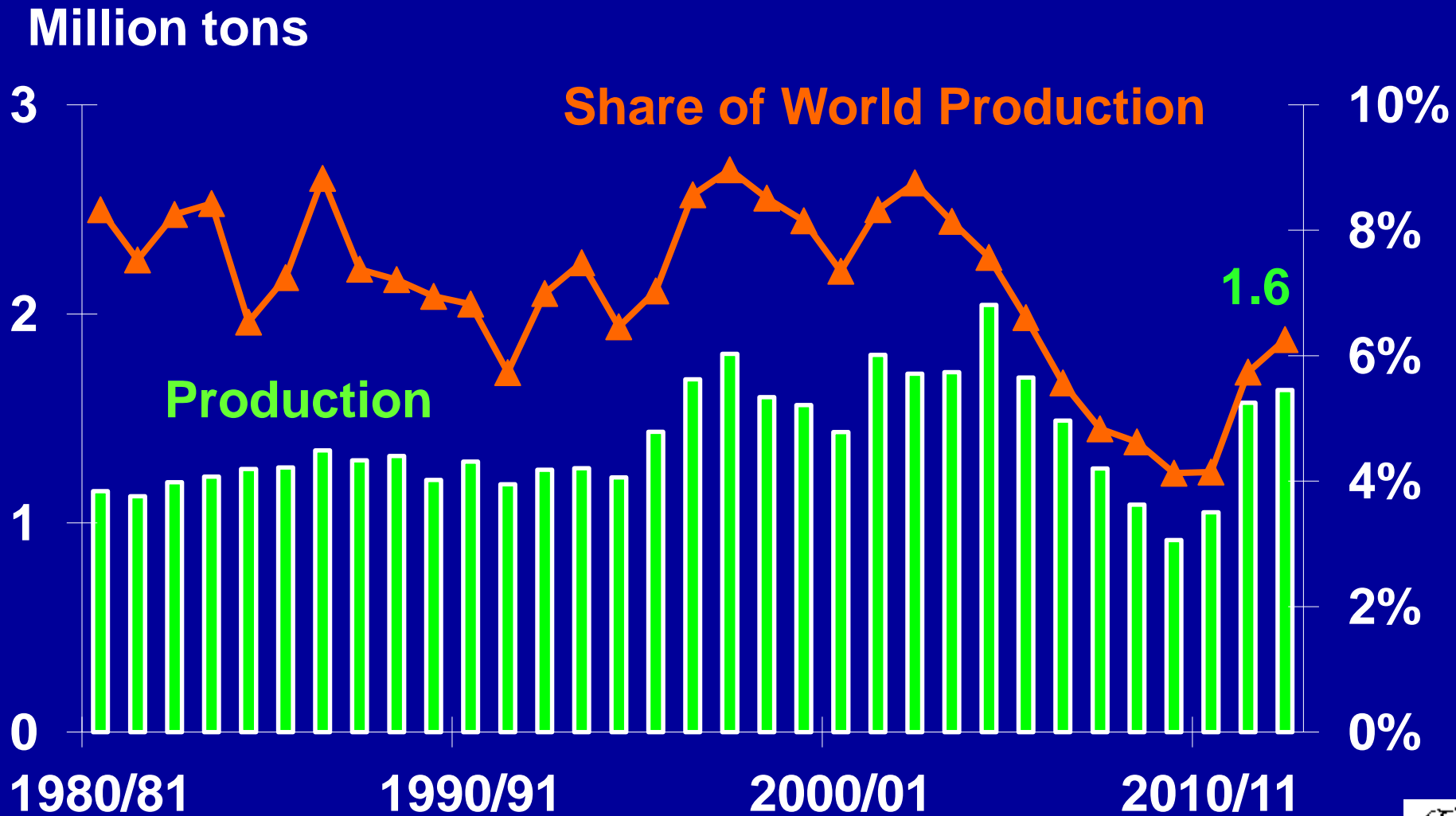
Dr. Alejandro Plastina , Economist
International Cotton Advisory Committee
11th Congress of A.C.A. - Lomé, Togo - March 22, 2013

Past Trends in Cotton Production

World Cotton Production and Mill Use

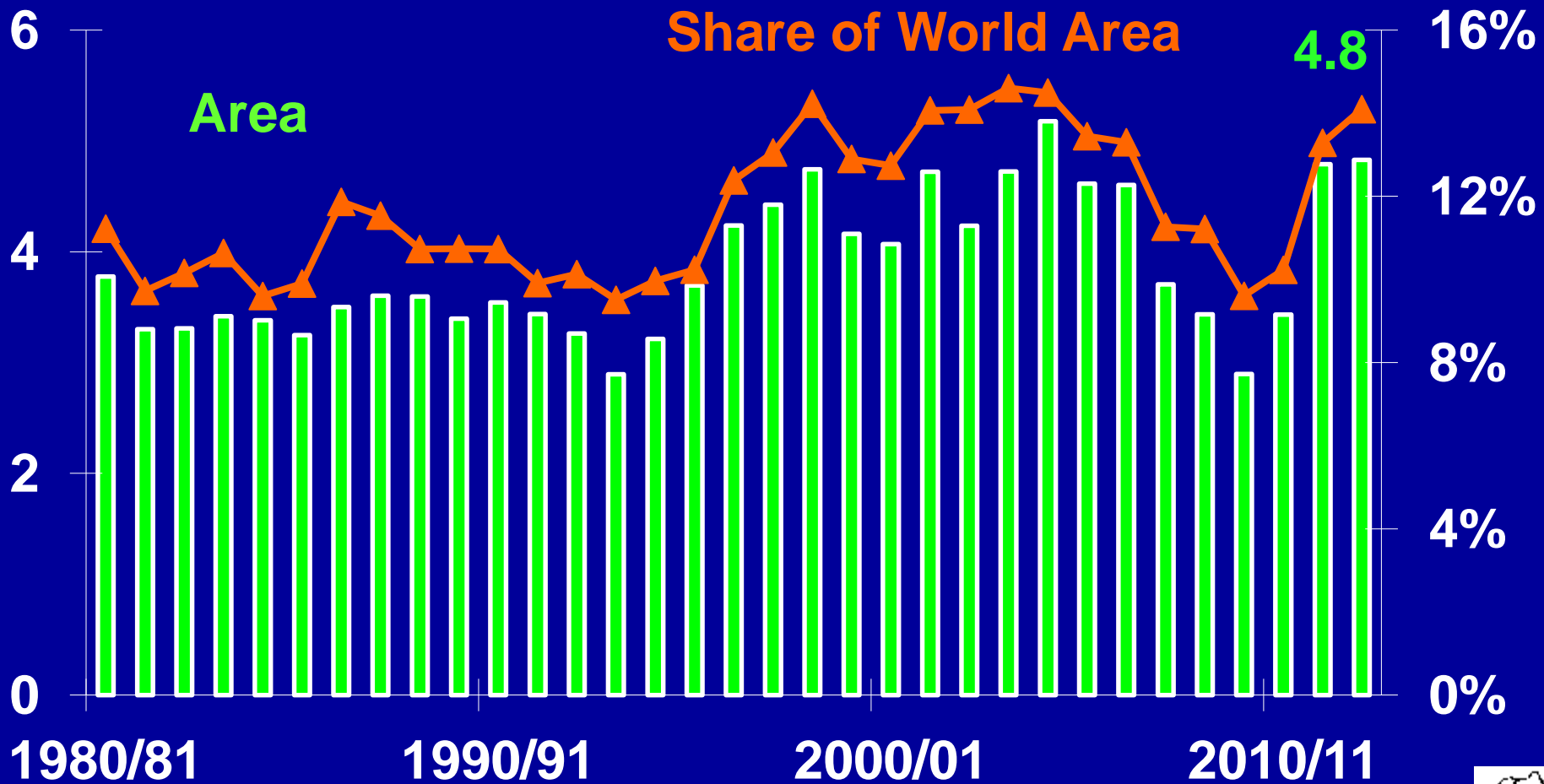


Cotton Production in Africa

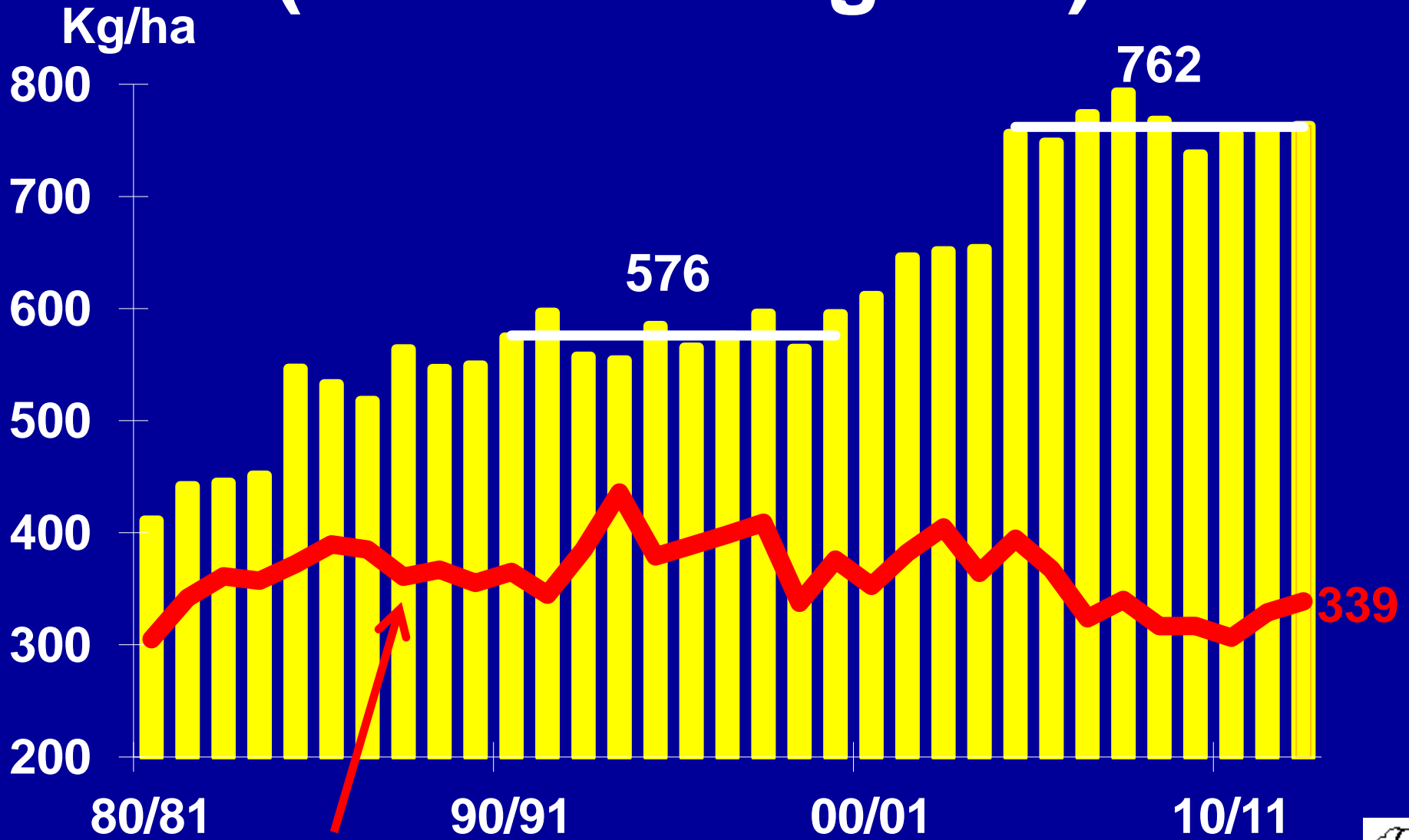


Cotton Area in Africa

Million hectares



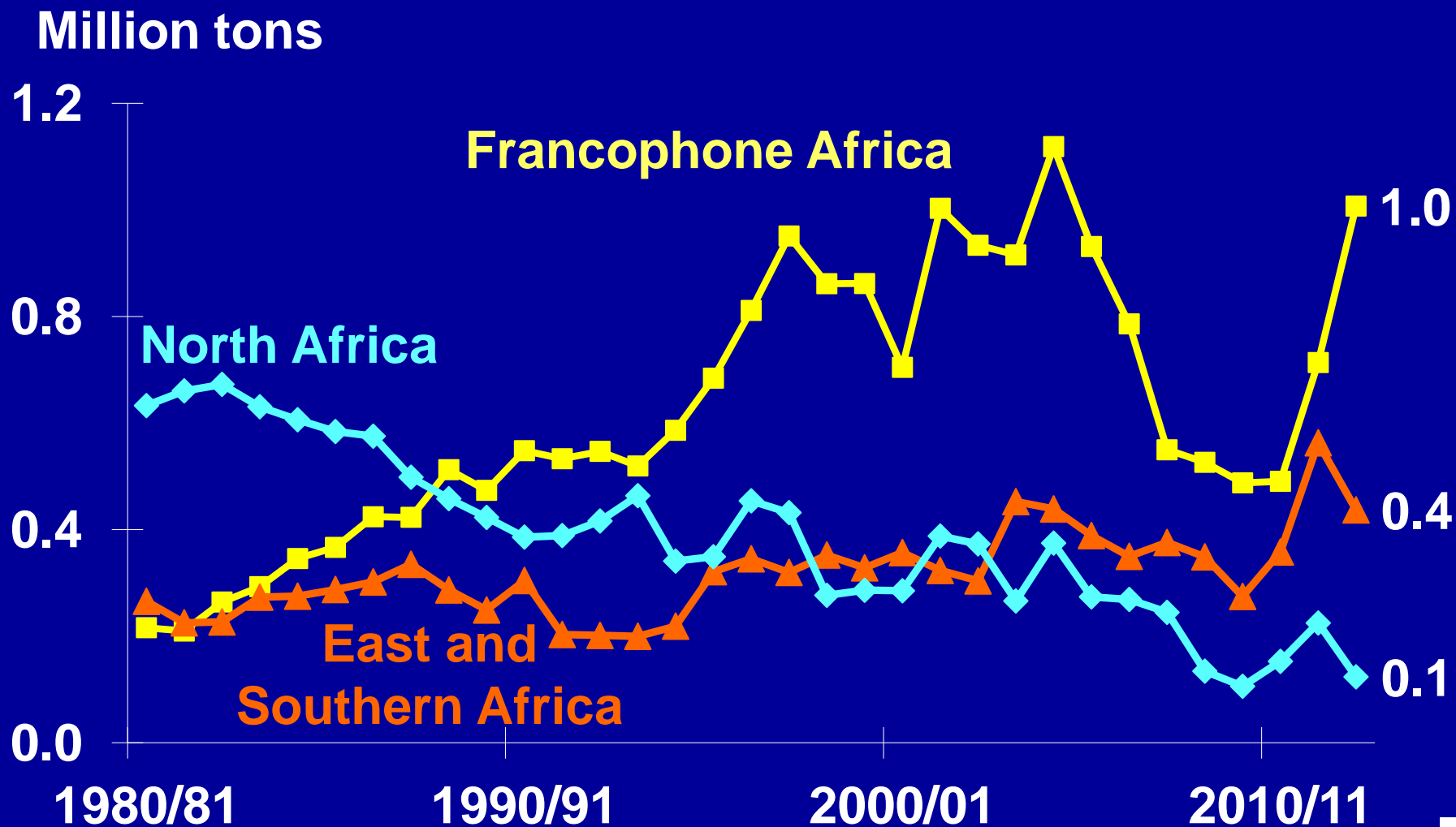
World Average Yield (rainfed + irrigated)



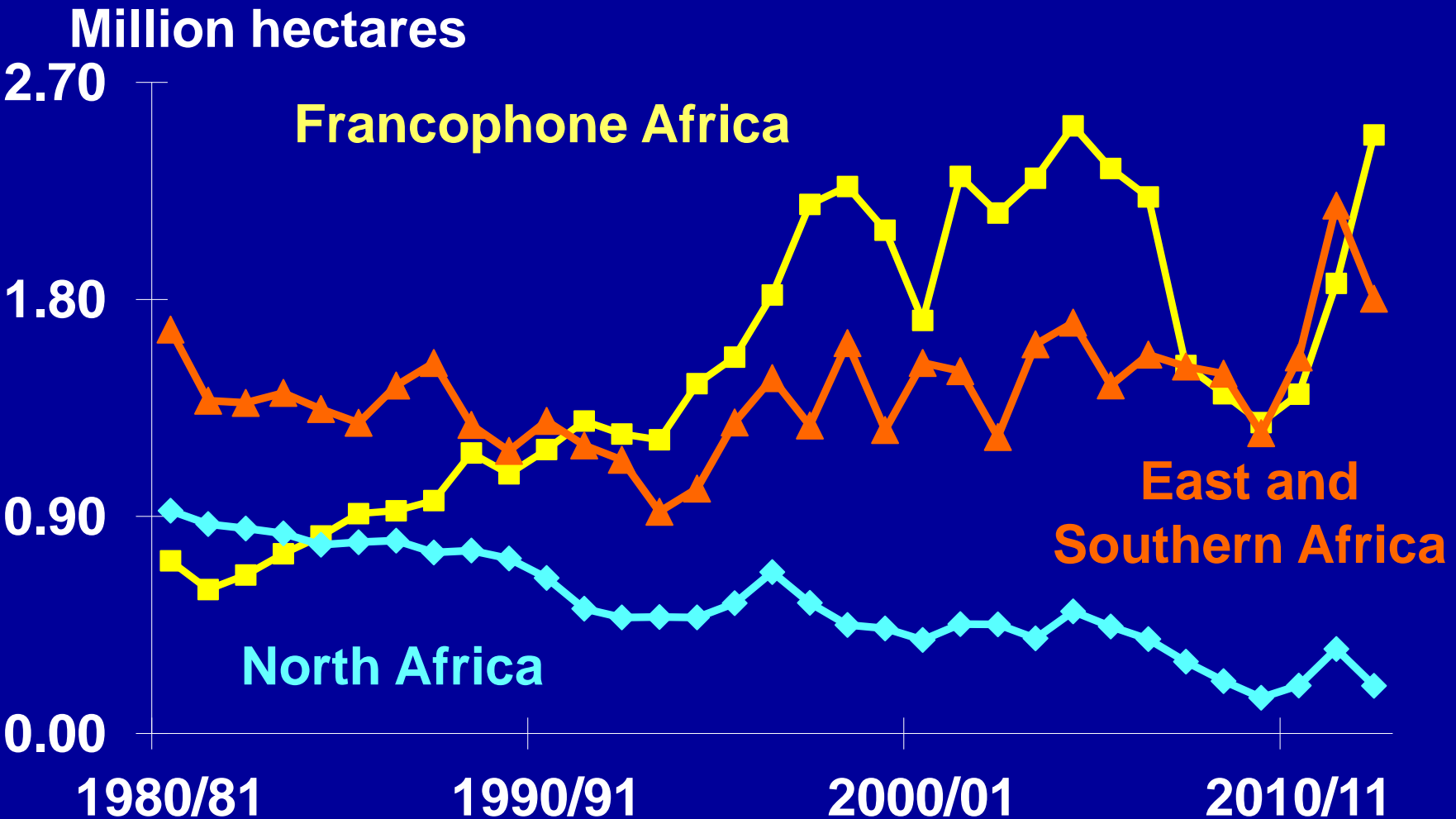
Africa: Avg. 362



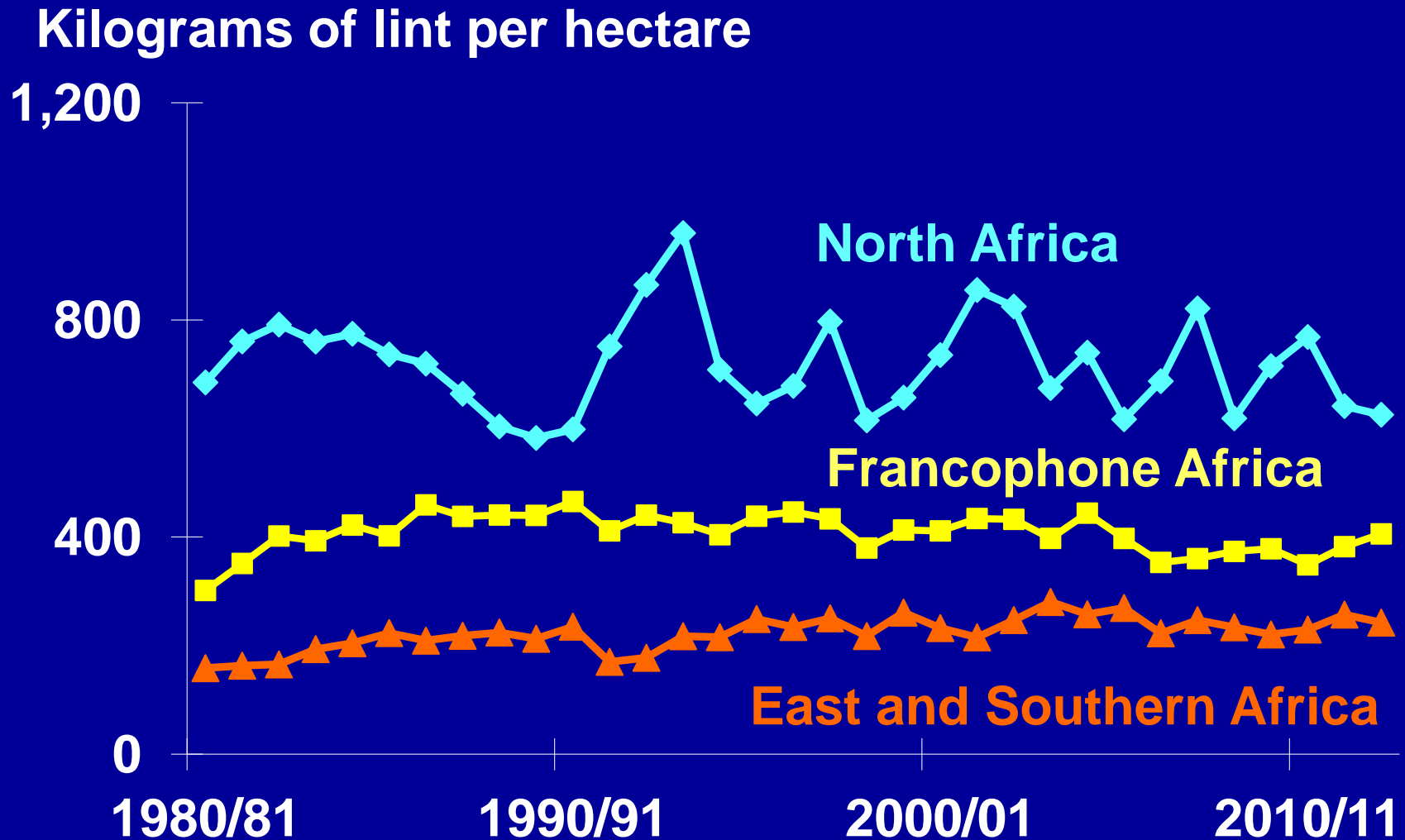
Africa: Cotton Production by Region



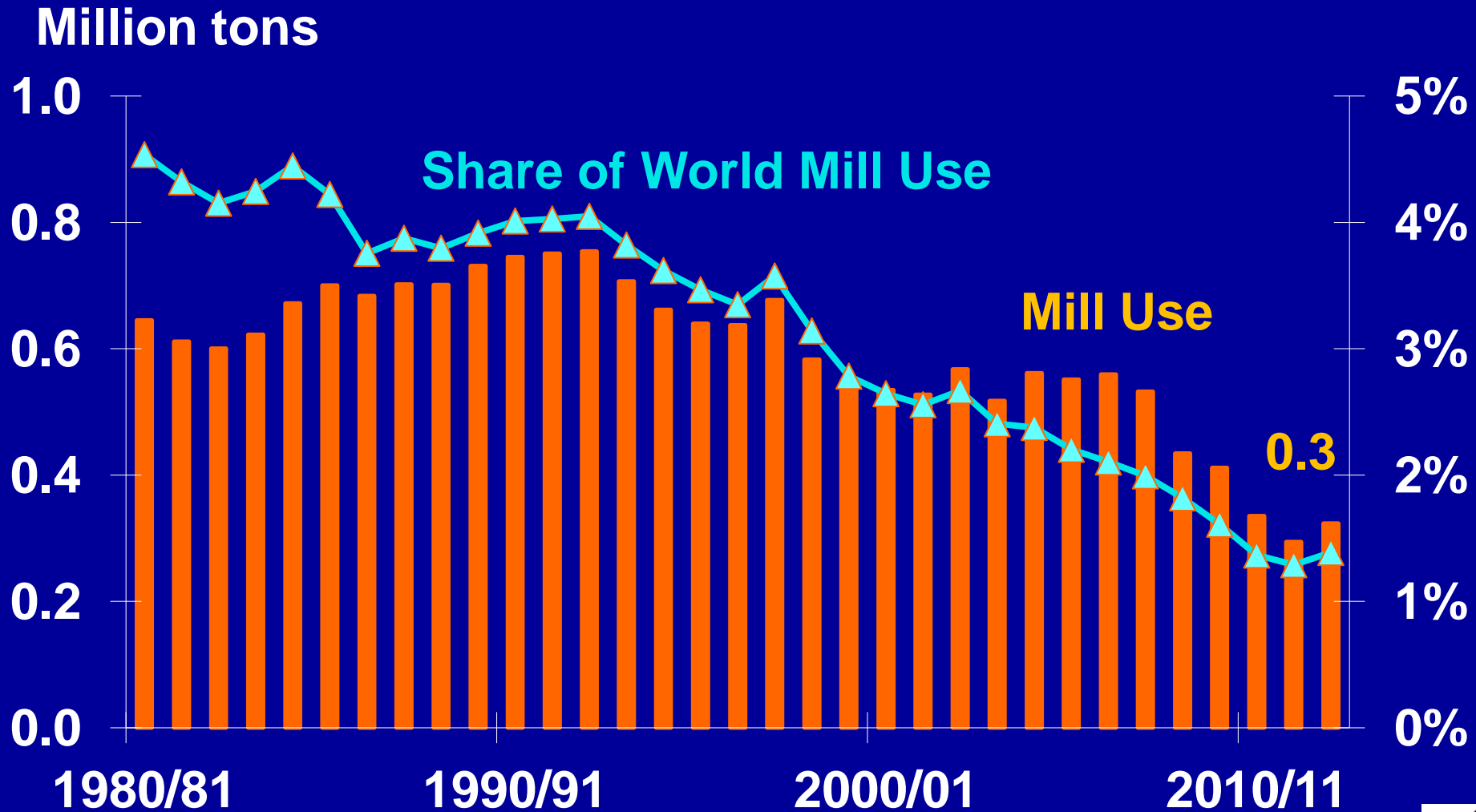
Africa: Cotton Area by Region



Africa: Yields by Region



Cotton Mill Use in Africa



Cotton Exports in Africa

Million tons

Share of World Exports

Exports

25%

20%

15%

10%

5%

0%

1.4

2

1

0

1980/81

1990/91

2000/01

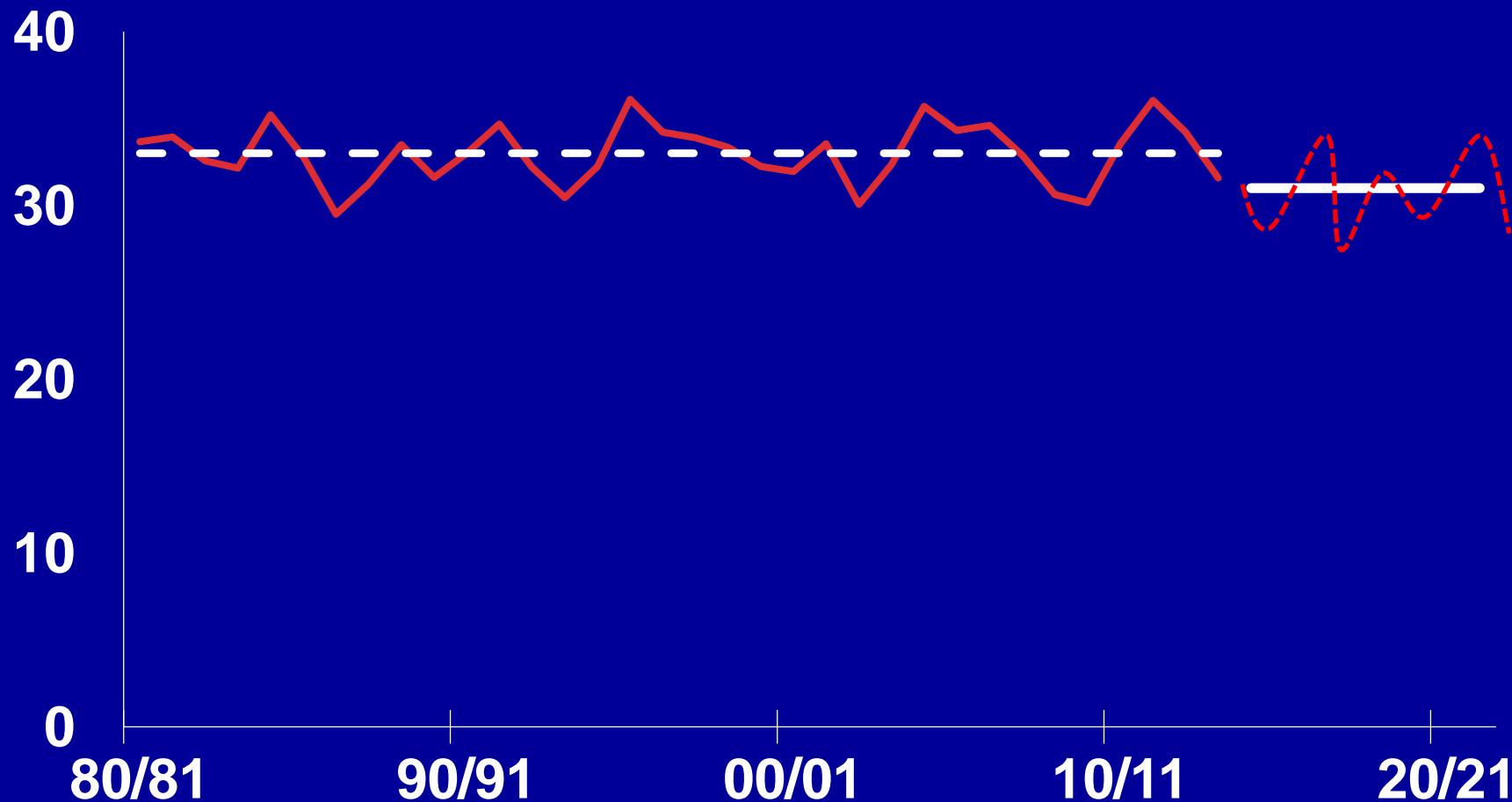
2010/11



Future Trends in Cotton Supply and Use

World Cotton Area

Million Hectares

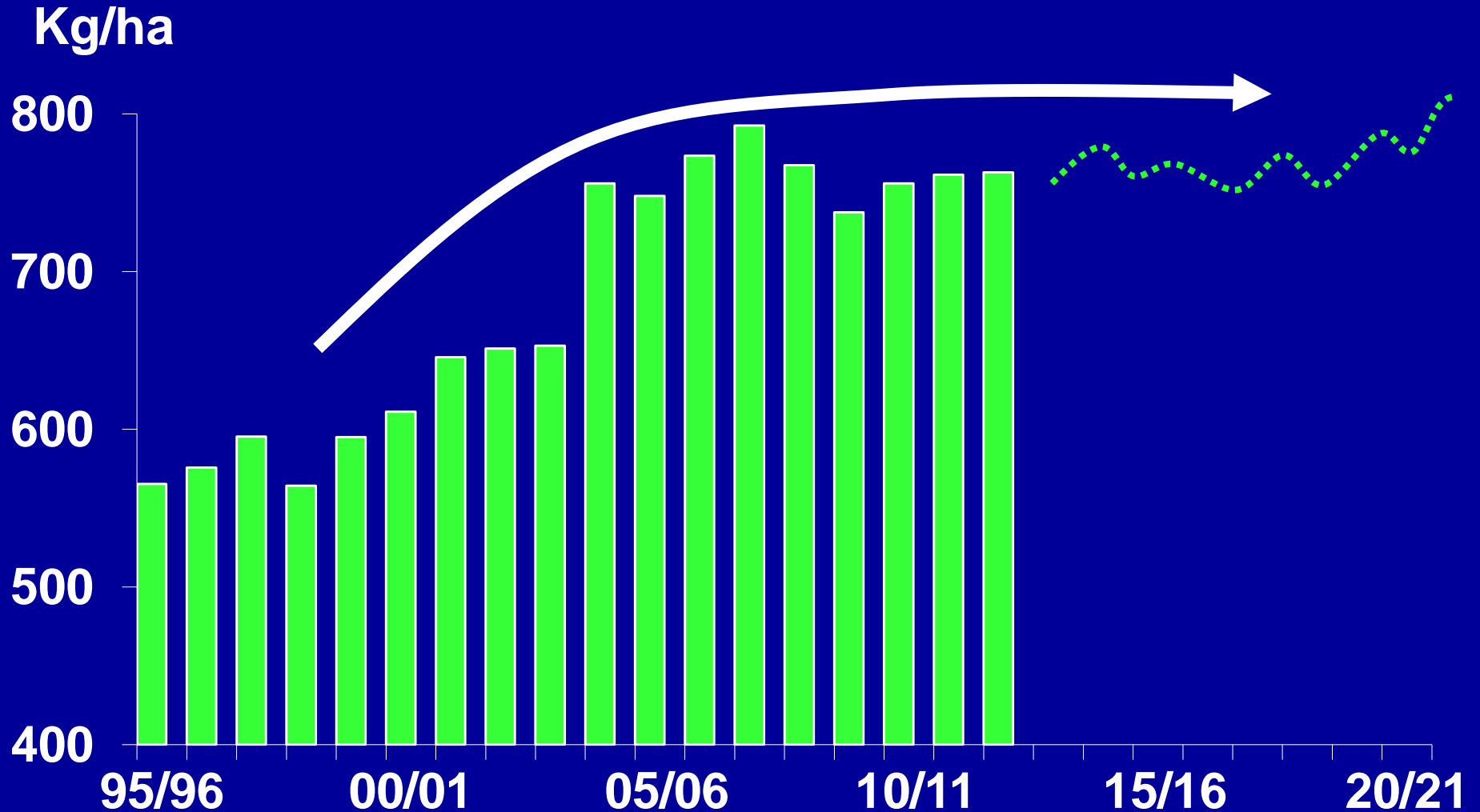


Technological Changes in Agriculture

- Mechanization
- Synthetic fertilizers
- Insecticides
- Herbicides
- Biotechnology
- ?

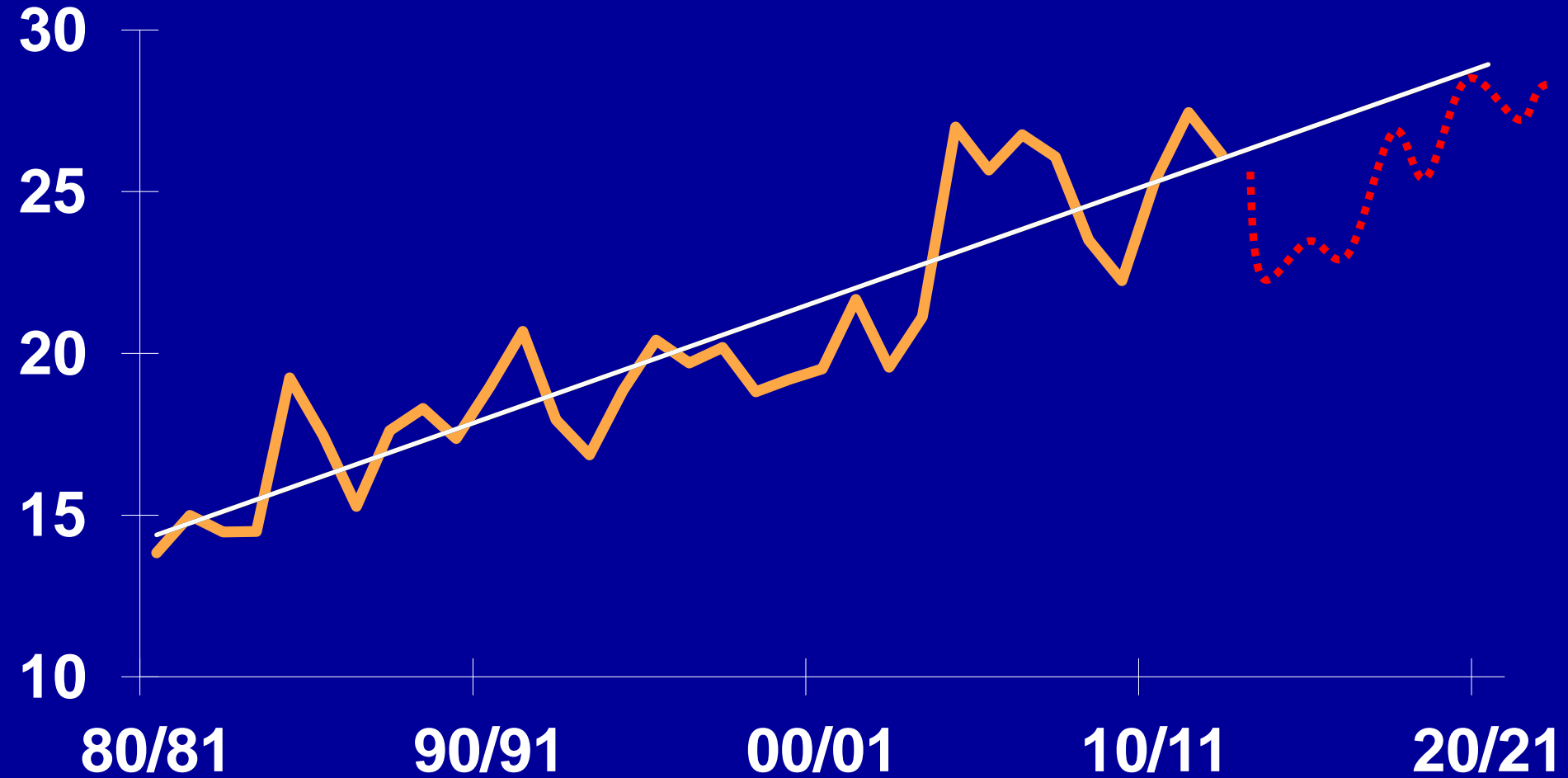


Average World Yield



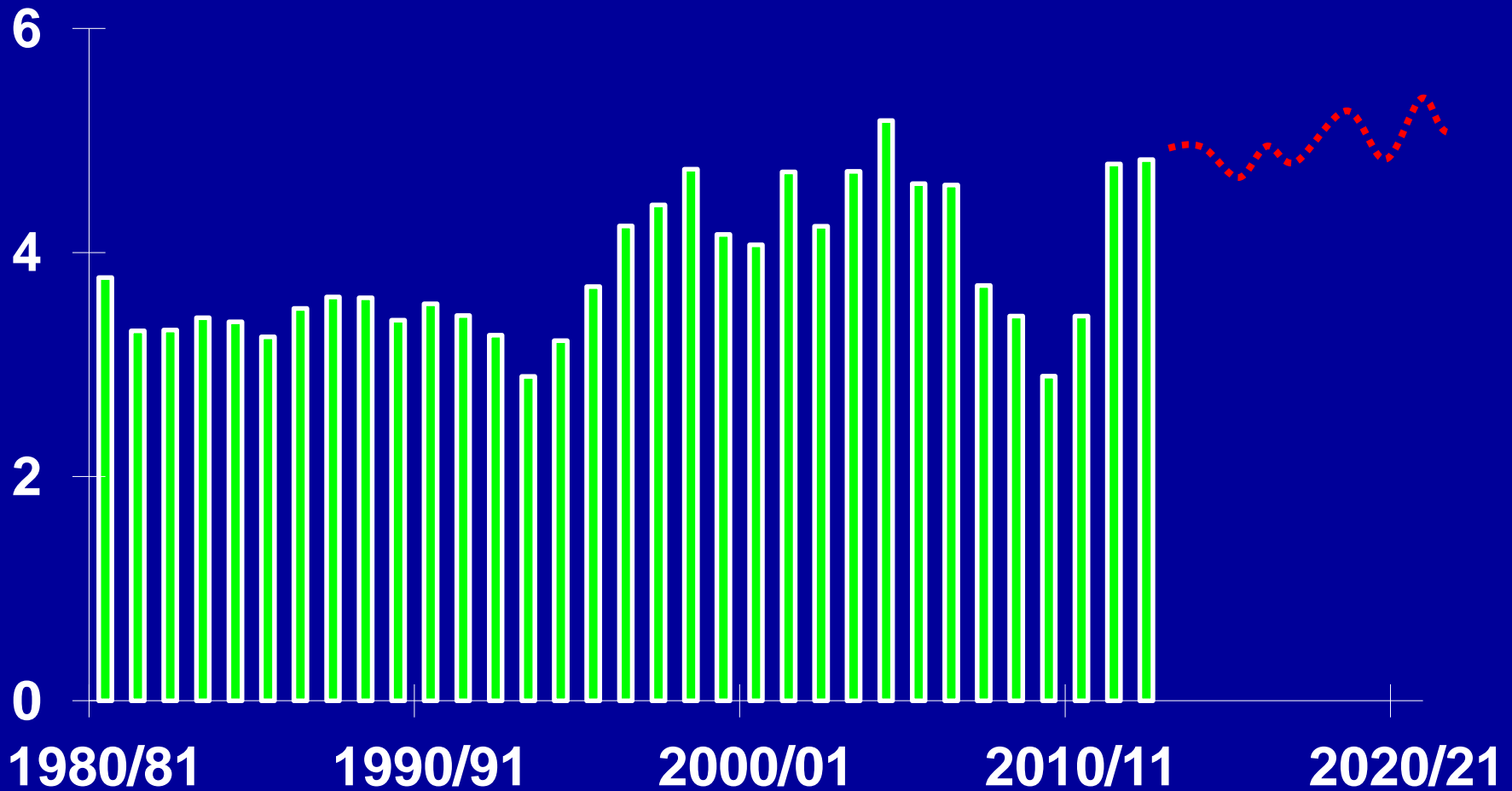
World Cotton Production

Million Tons



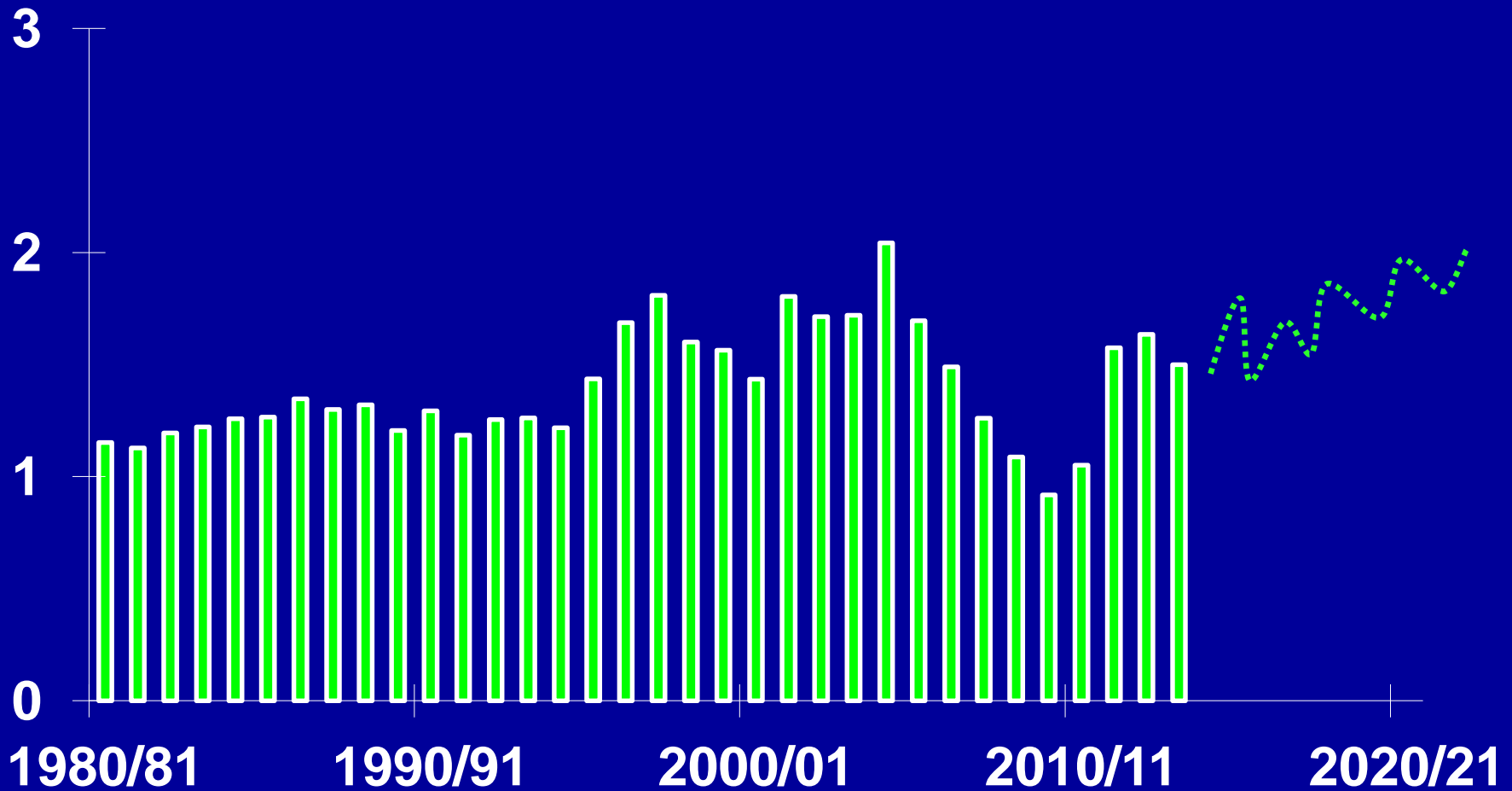
Cotton Area in Africa

Million hectares



Cotton Production in Africa

Million tons



African Cotton: Buyers Perceptions

Positives:

High Quality

Fewer Neps

Negatives:

Contaminated

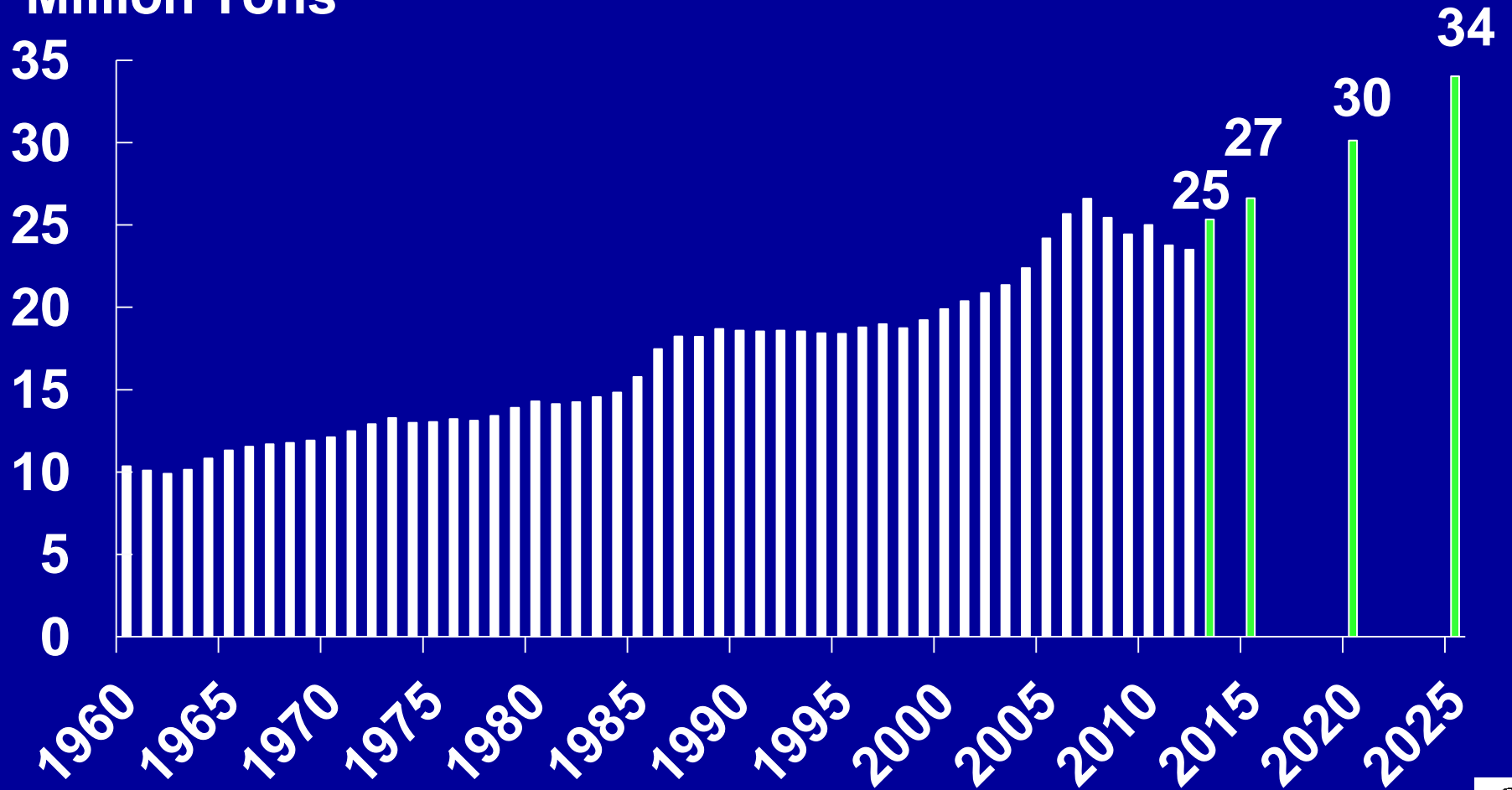
Declining Availability

Difficult Logistics

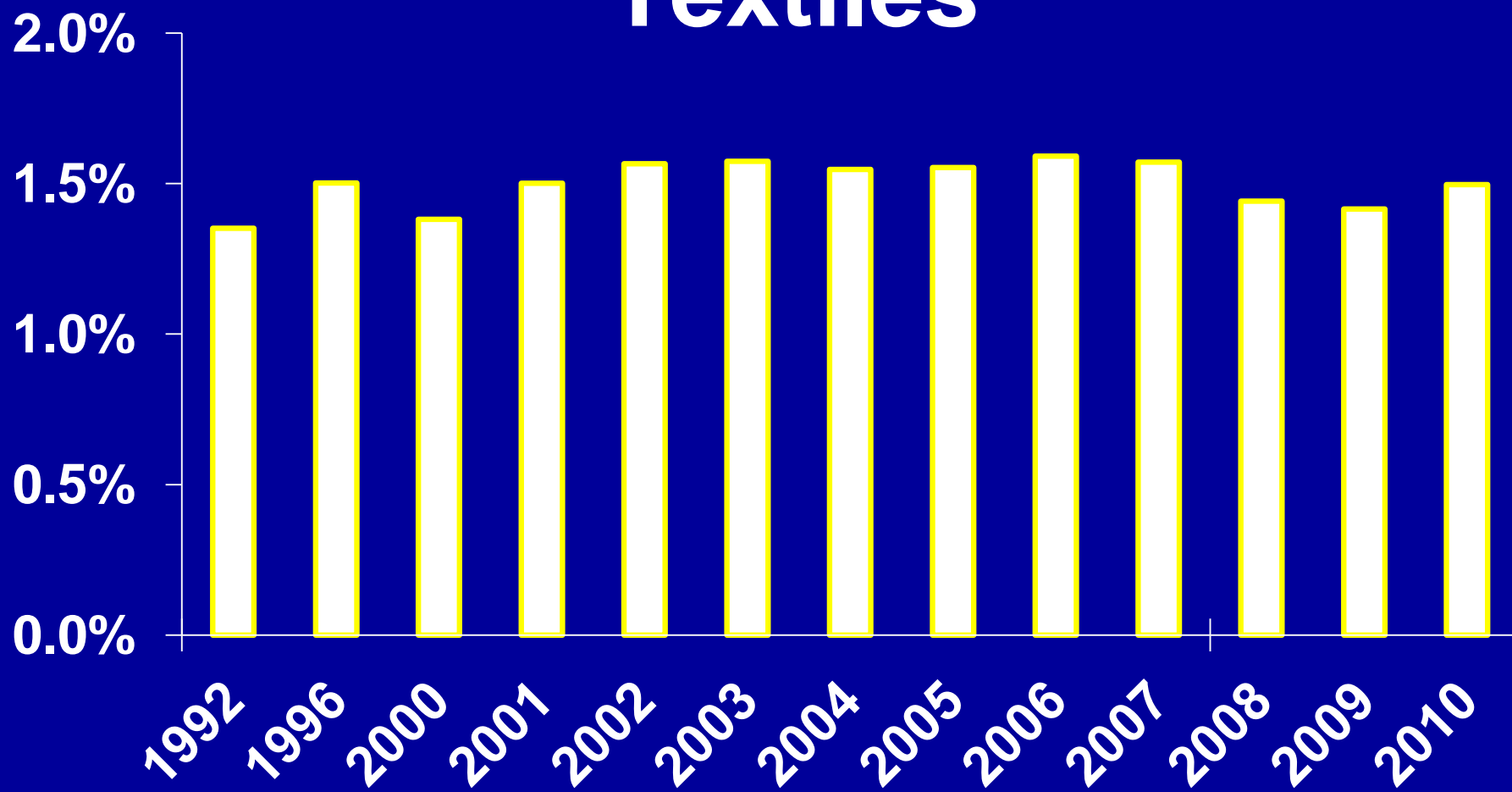
Hand classed

World Consumption of New Cotton Textiles

Million Tons

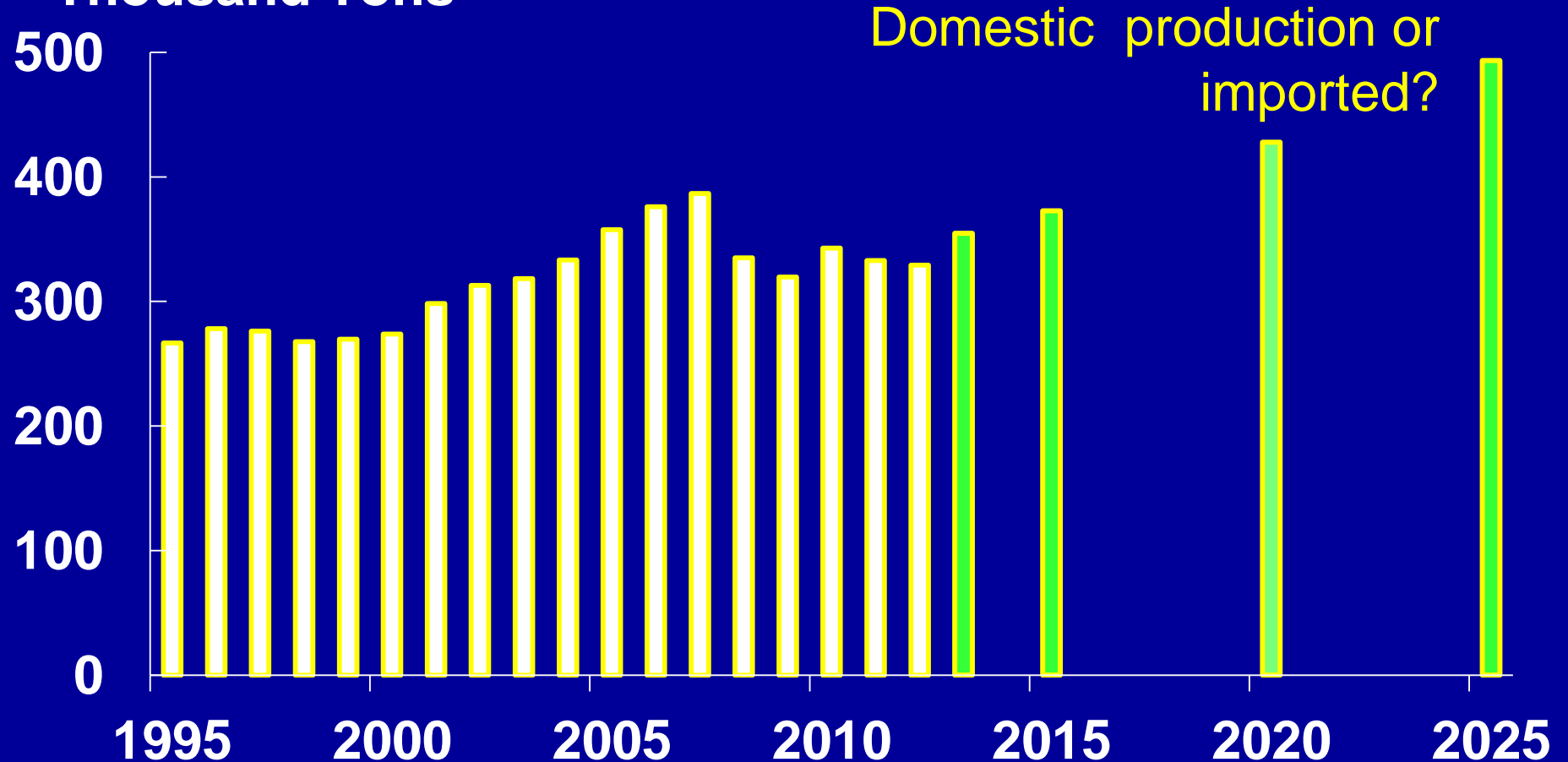


Share of Africa in World Consumption of New Cotton Textiles



Africa Consumption of New Cotton Textiles

Thousand Tons



African Cotton Sector: other issues

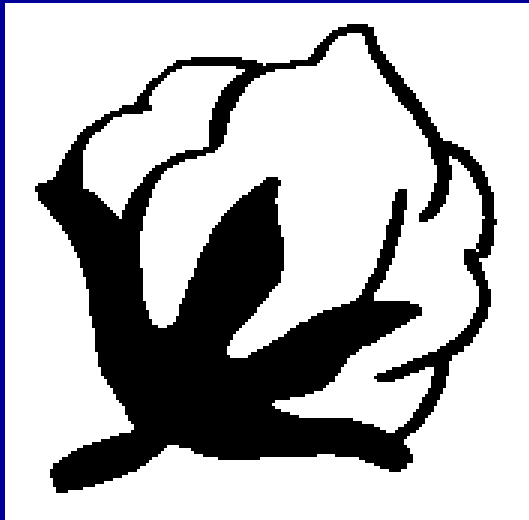
Yarn production: China → ASEAN → Africa?

Global futures contract: FOB African port?

Second hand clothing?

Can problems be solved? CFC/ICAC Project on
Sudan cotton stickiness. \$95 million extra
revenue 1997-2009

Thank you for you attention



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