



PRESENTATION

Session: **A Wider View**

Title: **World Cotton Trade Statistics**

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Presentations are available in the conference archive: <https://baumwollboerse.de/en/competencies/international-cotton-conference/speeches/>

Conference Organization

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WORLD COTTON TRADE

presented at

Bremen Cotton Conference

29-30th Sept 2022

Bremen, Germany

By Parkhi Vats

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International Cotton Advisory
Committee

Story so far..

Dec 2021
The US-China
Phase 1
Economic and
Trade
Agreement
comes to an end



JUNE 2022
The Uyghur Forced Labor
Prevention Act came into effect
on June 21, 2022.
Bad weather updates from major
cotton producing countries.



Sept 2021

The cotton market
was riding on several
bull variables



Feb- March 2022

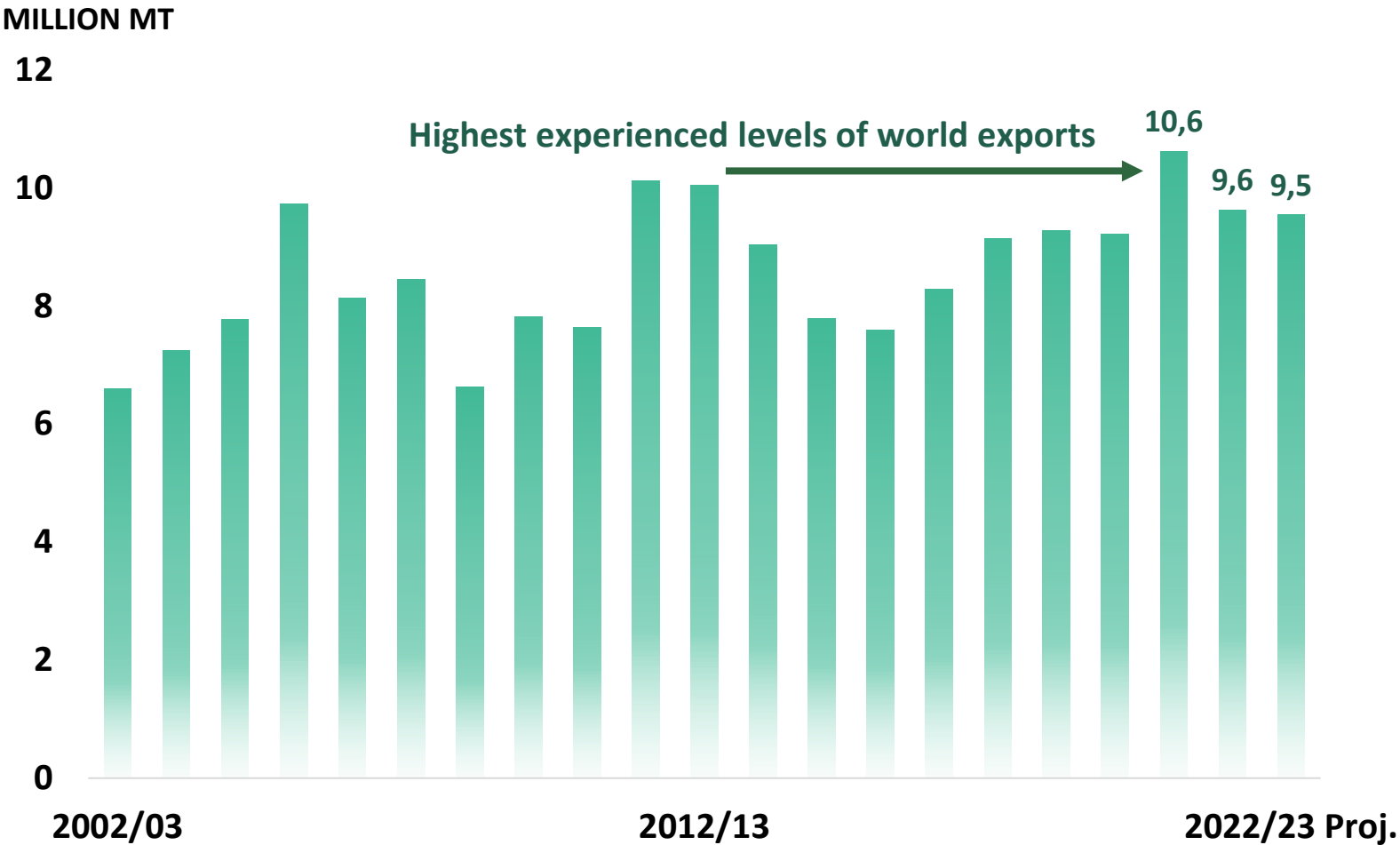
Russian invasion of
Ukraine which lead to
sanctions against
Russia.

Covid-19 related
lockdowns in China



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World cotton trade trend



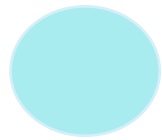
Exports reached its highest experienced levels of all times in 2020/21.

World exports are currently 9% lower than the previous season at 9.6 million tonnes.

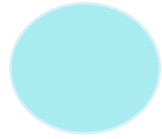
For the next season, exports are estimated to fall further by 1%.



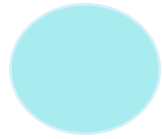
Leading cotton lint exporters



Top 5 exporters at the end of 20/21 season were US, Brazil, India, West Africa and EU.



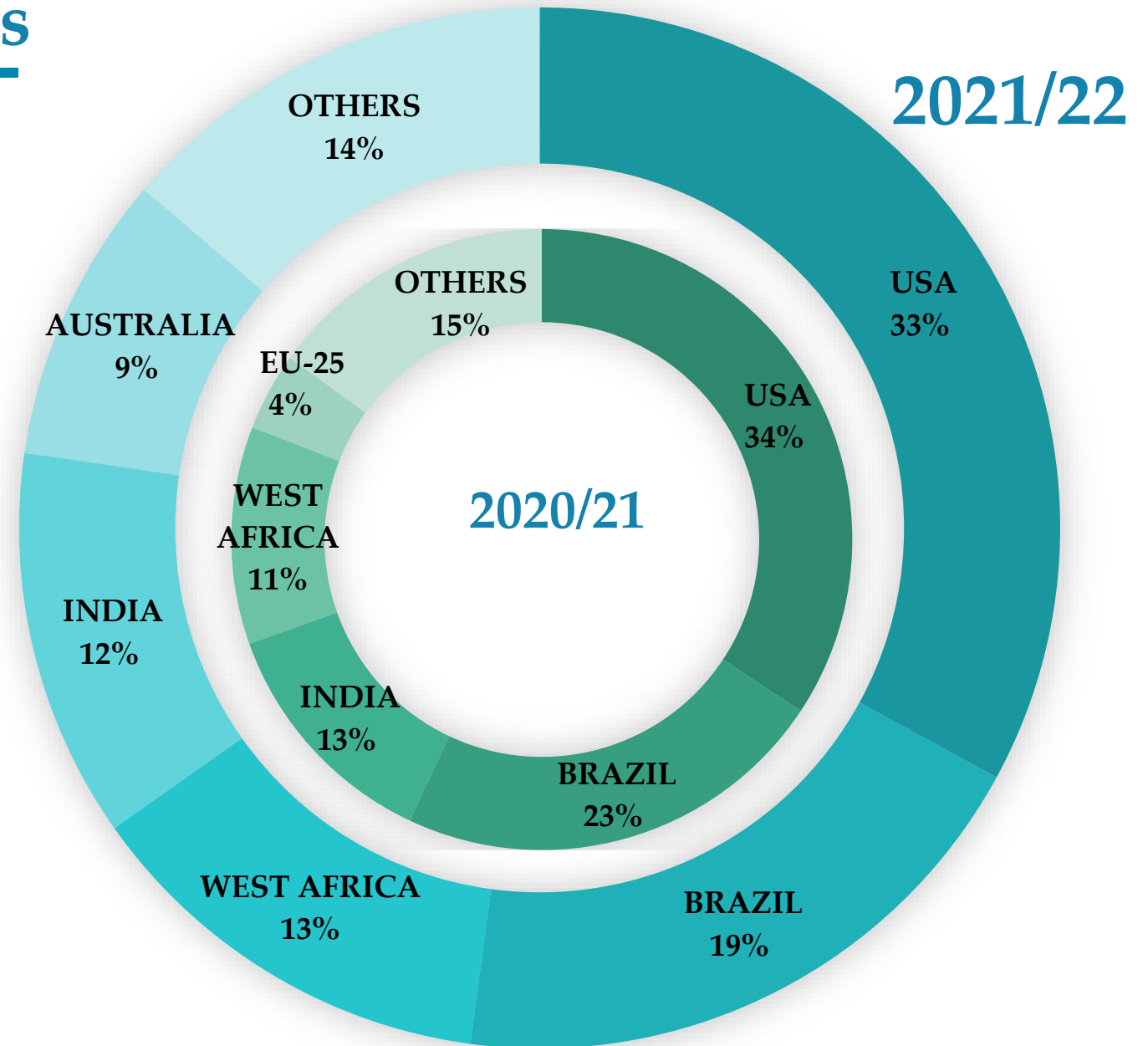
At the end of 21/22 season, Australia had replaced EU to regain its position amongst the top 5 world cotton lint exporters.



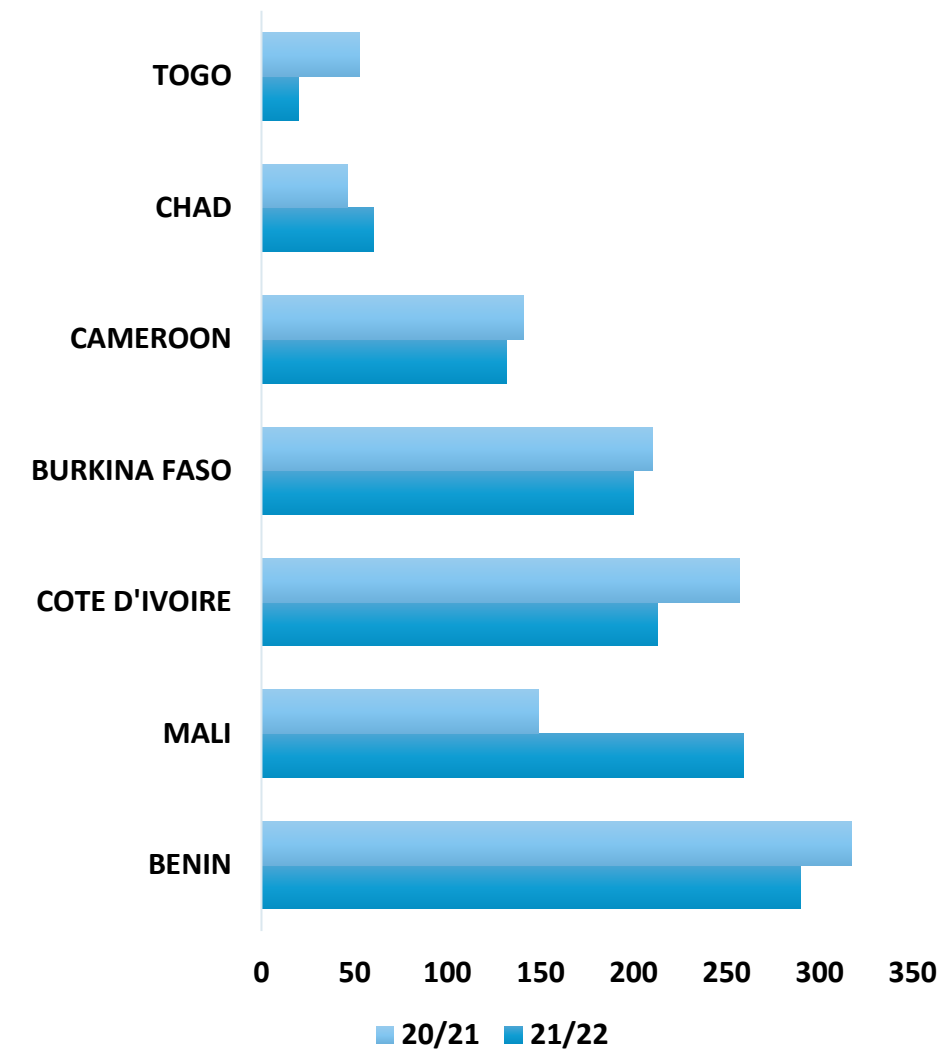
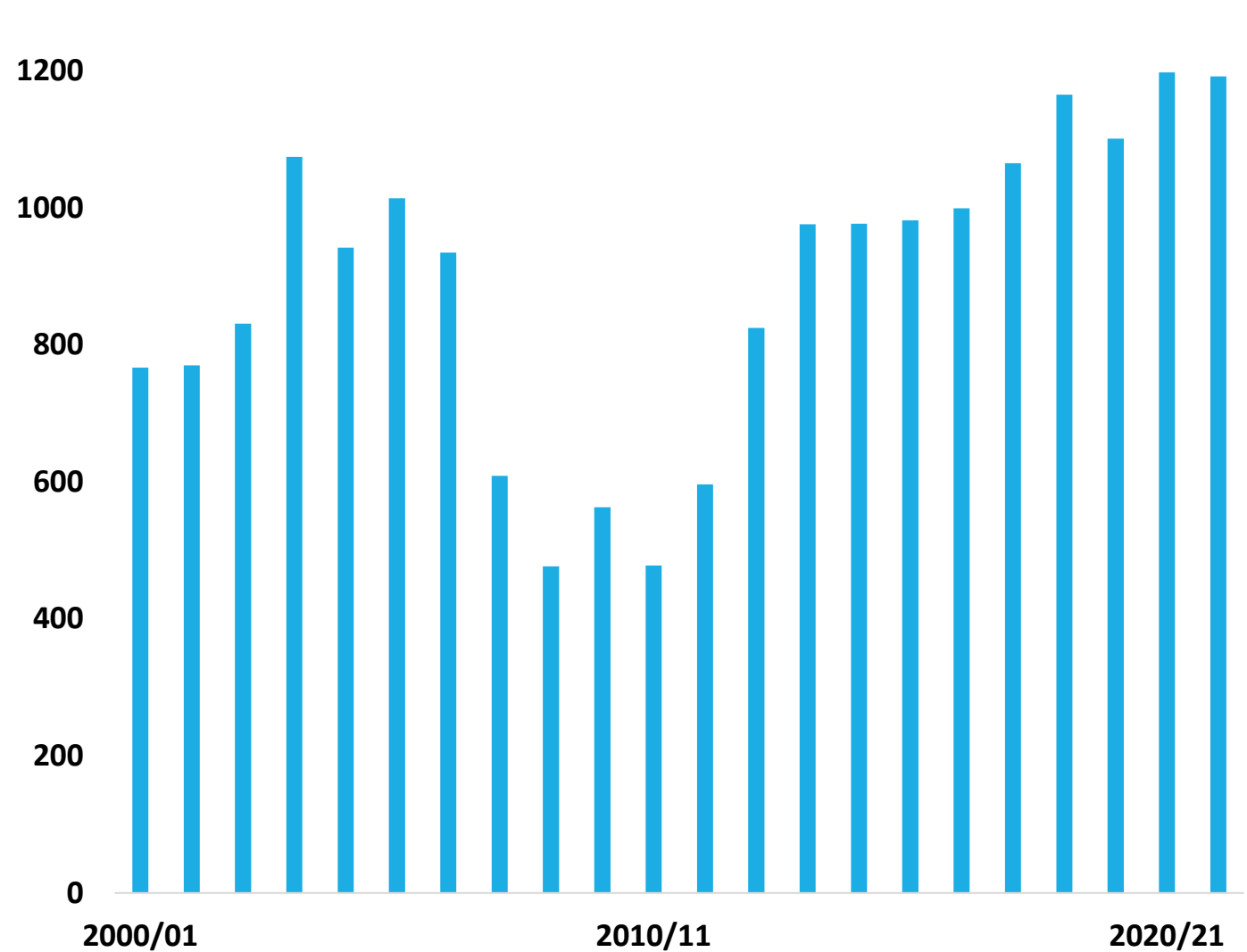
United States remains the leading exporter of cotton lint.



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West Africa Exports



Leading cotton lint importers



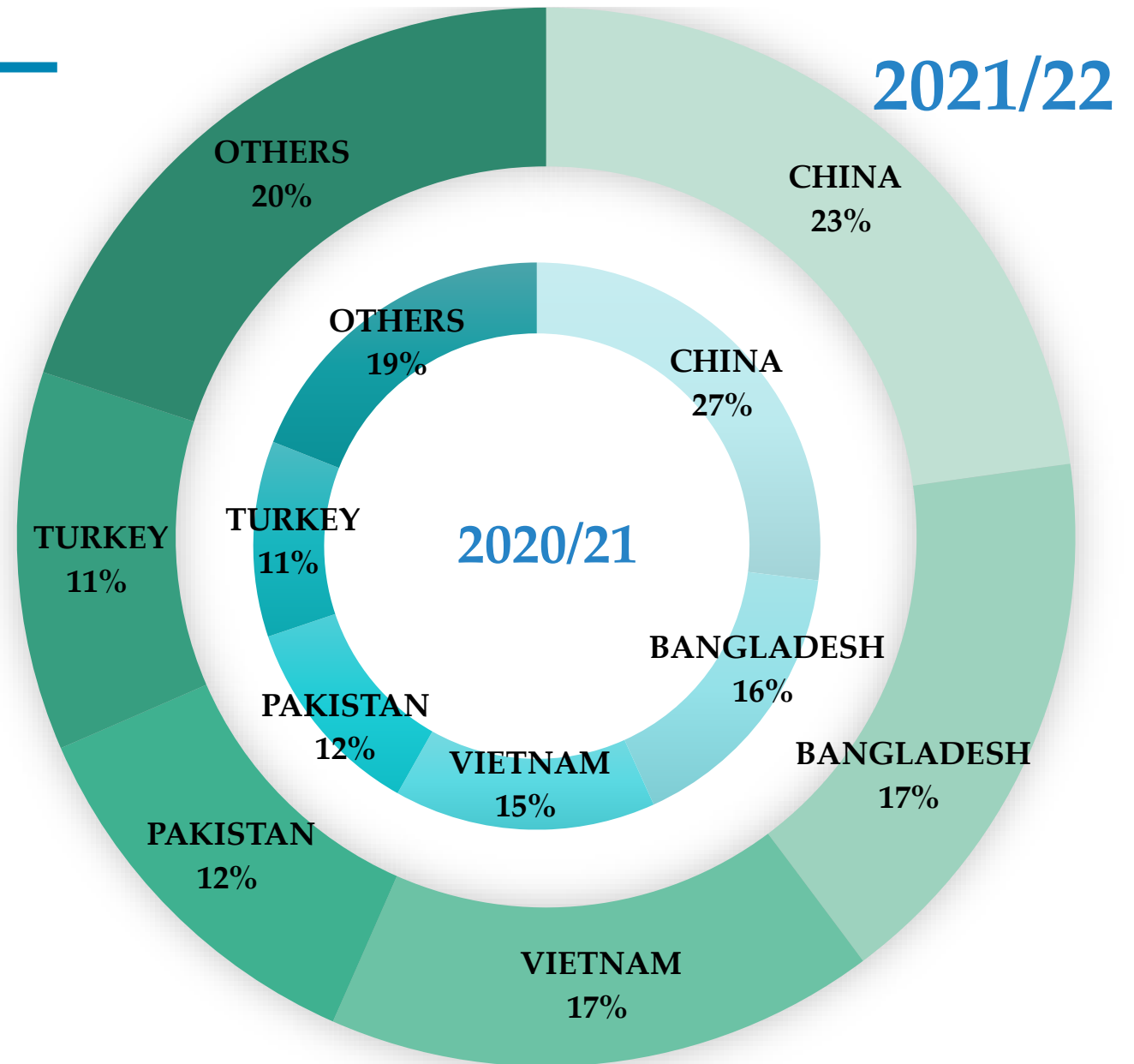
China remains the top importer



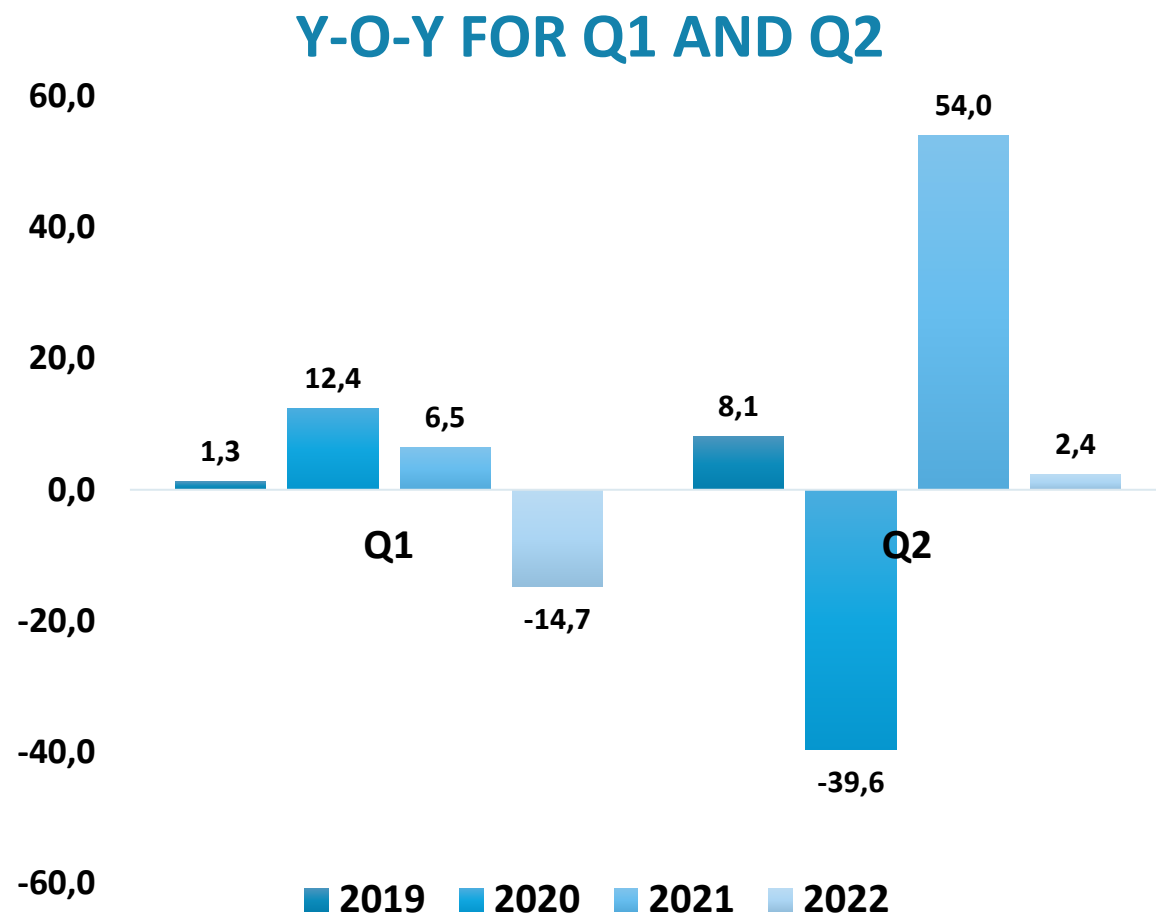
Other major importers have maintained their levels and market shares of imports.



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Has the cotton trade started slowing down?



Variables impacting cotton trade



Could there be a production shortfall?

USA
Almost 66% of cotton production is within the area experiencing draught.

BRAZIL
Heat wave may affect yields

UZBEKISTAN
Extreme heat may affect cotton yield

CHINA
Heat wave before harvest season and record-low water levels in the Yangtze river, crucial for global supply chain.

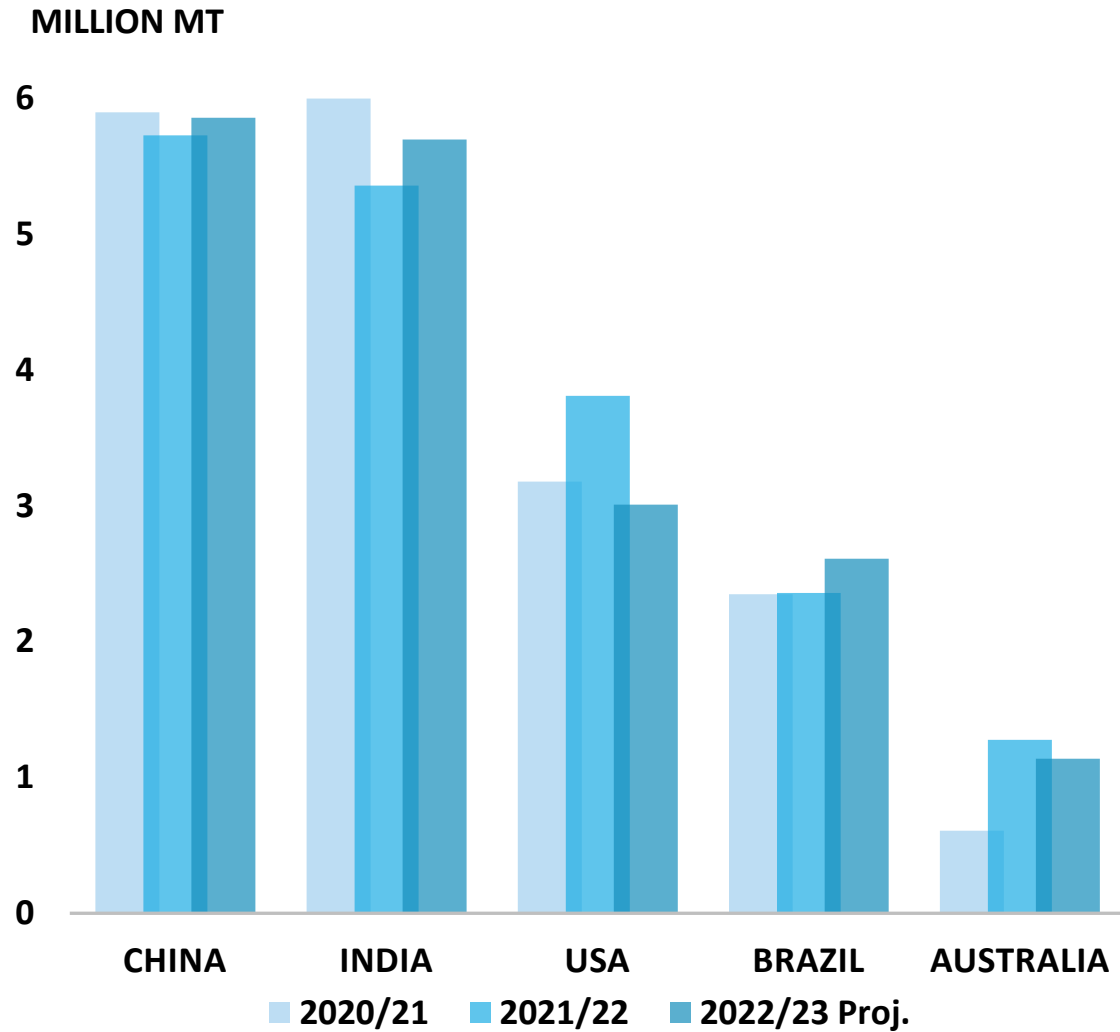
Pakistan
Floods have affected around 45% of cotton crop.

INDIA
Floods in Gujarat (one of the largest states producing cotton) and leaf curl virus in the northern states.



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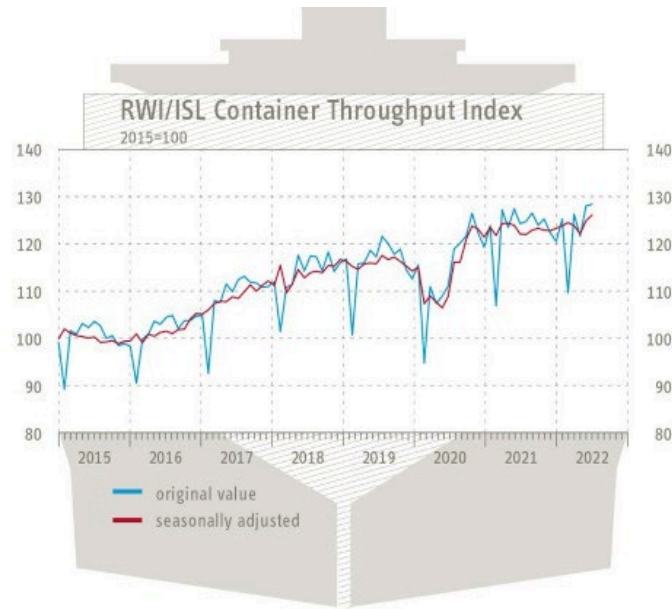
Top 5 world producers



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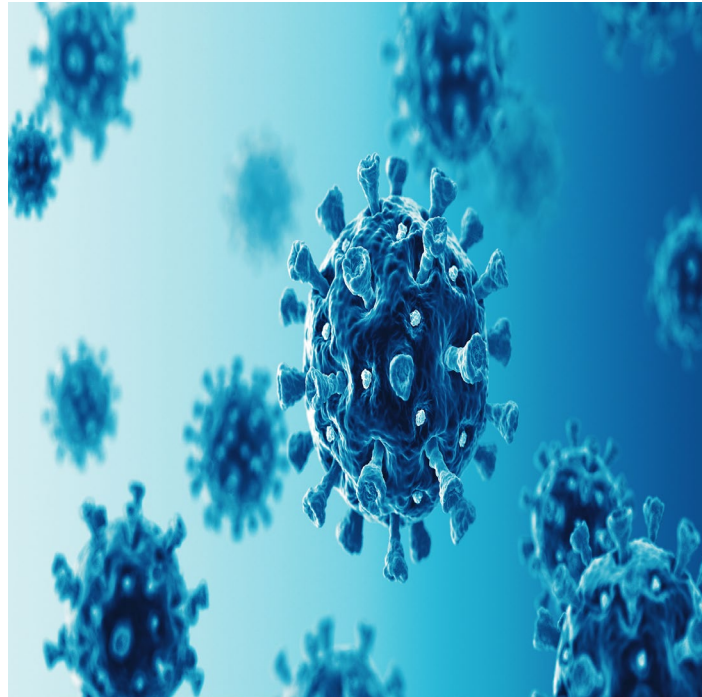


Supply Chain issues and the never-ending pandemic

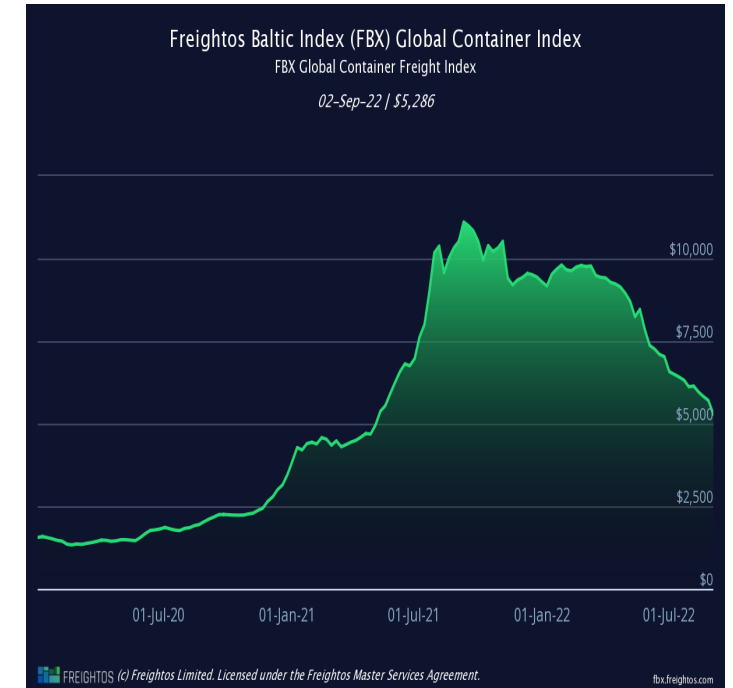


RWI/ISL computations based on data provided by 94 ports. May 2022: flash estimate.

Container Throughput Index is showing significant recovery in container throughput.



Covid-19 related lockdowns in Q1 and Sept 2022 in China.



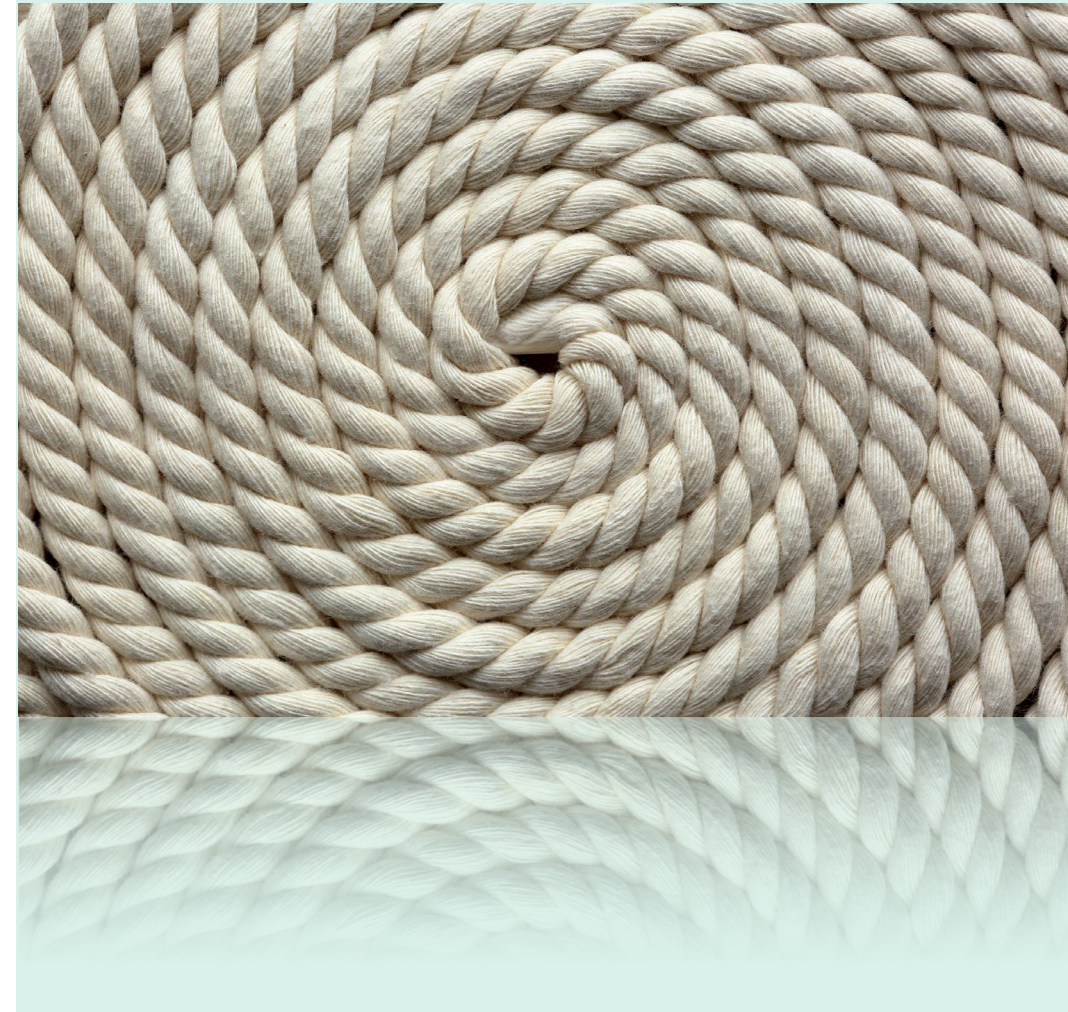
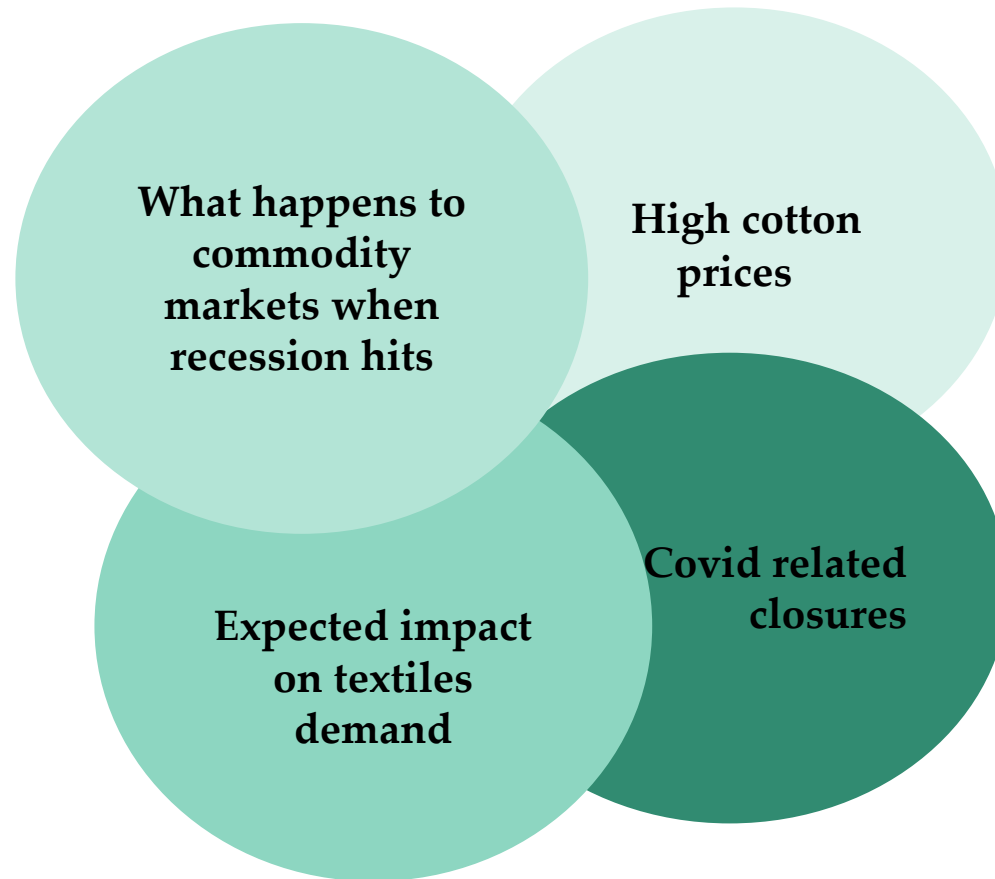
Having soared throughout the pandemic, the cost of shipping declined in March 2022.



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Source-ISL, Freightos data

Possible Impacts on Consumption



Policy Changes



US-CHINA TRADE PARTNERSHIP



CHANGE IN TRADE PARTNERS PROFILE



UPWARD PUSH TO THE COST OF PRODUCTION



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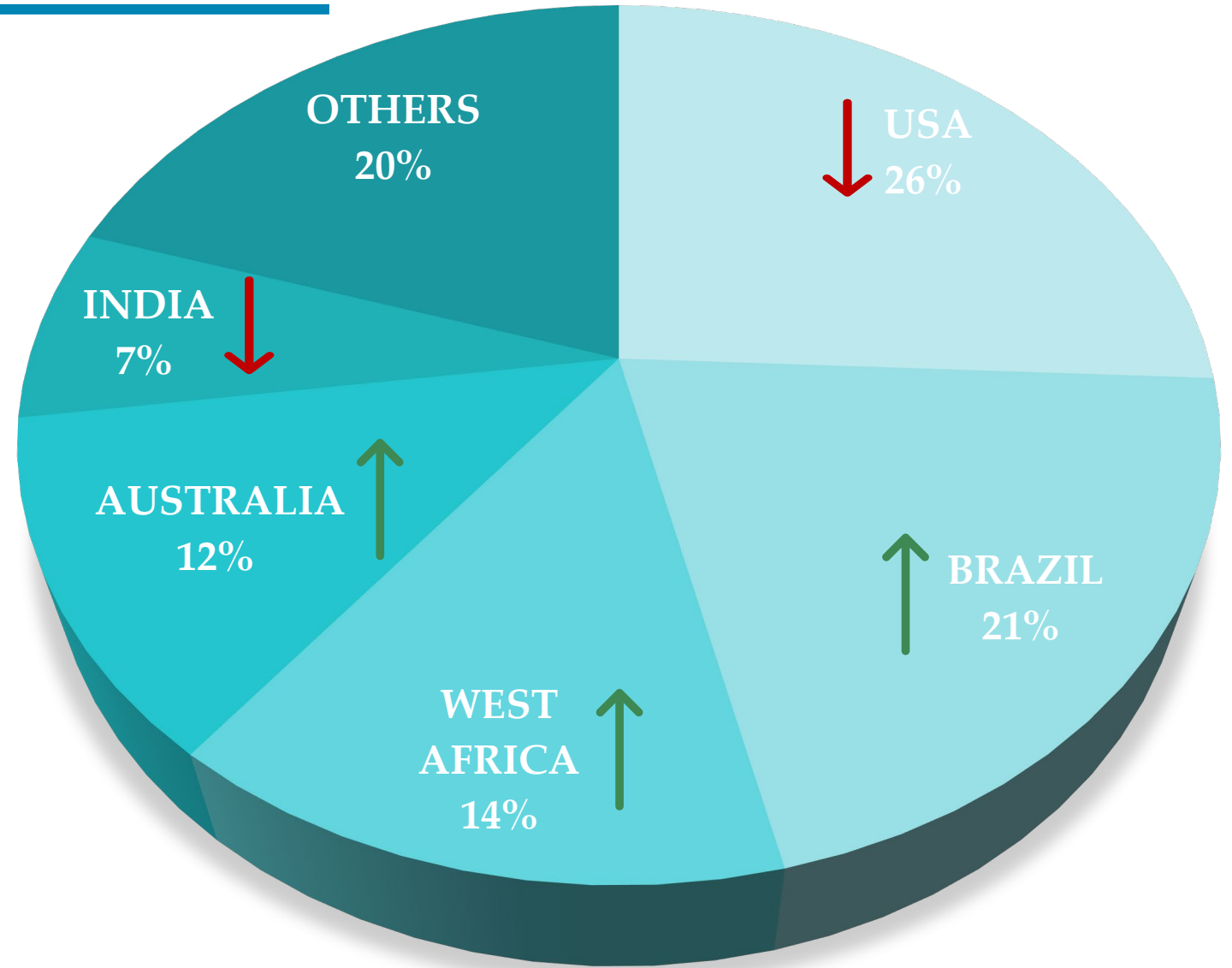
TRADE PROJECTIONS ?



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Export Projections

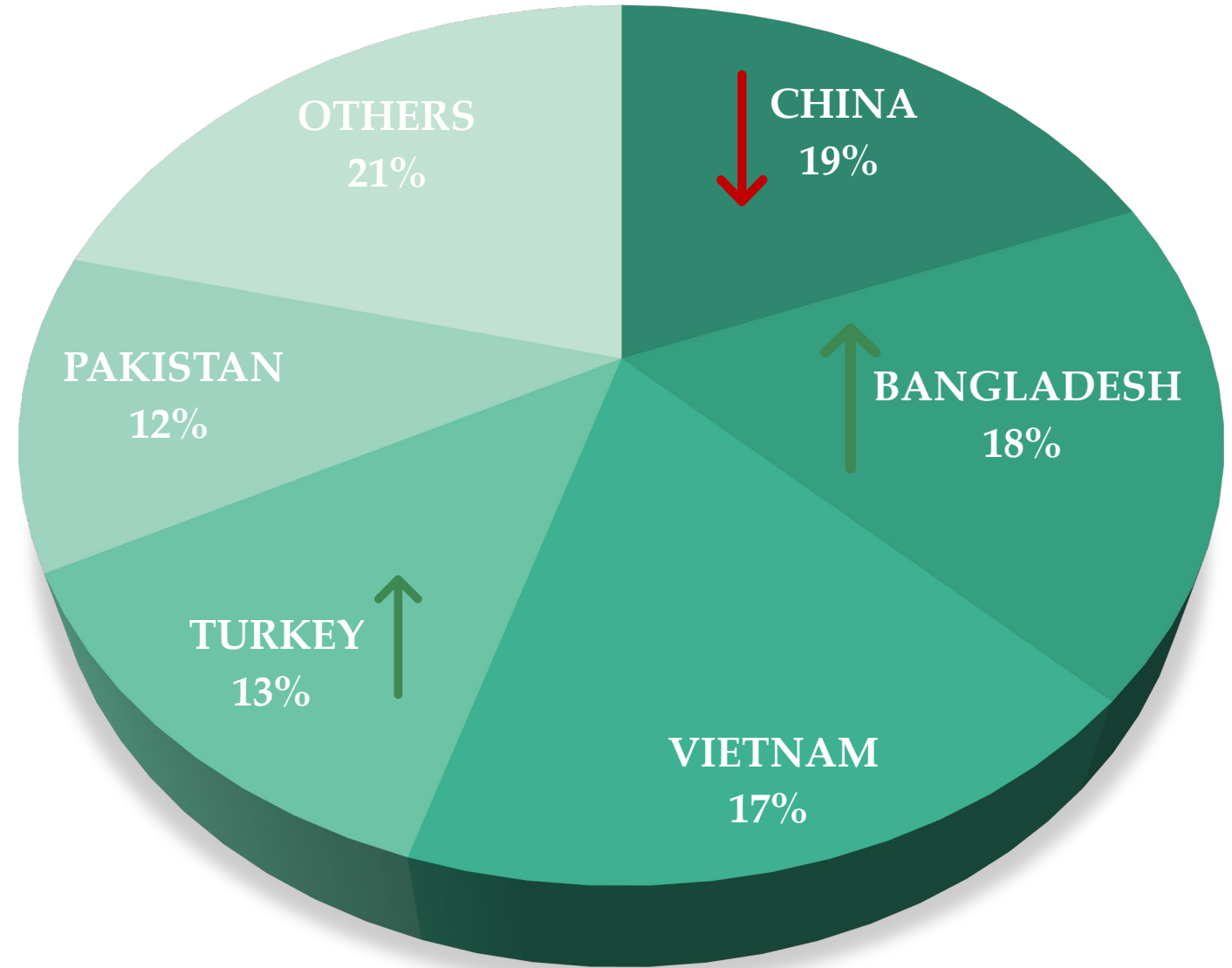
2022/23 PROJ.



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Import Projections

2022/23 PROJ.



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An abstract graphic consisting of a dense network of glowing blue lines and dots, resembling a complex web or data visualization, set against a black background.

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Thank You

**Happy to take any questions now or
via email-Parkhi@icac.org**



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