



INTERNATIONAL TEXTILE MANUFACTURERS FEDERATION
FEDERATION INTERNATIONALE DES INDUSTRIES TEXTILES
INTERNATIONALE VEREINIGUNG DER TEXTILINDUSTRIE

Spinners Committee

Travel Report

India 2013

From November 10-16, 2013 members of the ITMF Spinners Committee visited India as part of the on-going program of the Committee to visit cotton-producing countries around the world in an effort to strengthen the dialogue in the cotton pipeline between growers, ginner, seed breeders and cotton spinners.

The Committee would like to express its appreciation for the warm welcome and the interesting discussions and exchange of opinions whenever it had the opportunity to visit fields, gins or research institutions. The hospitality of all hosts was outstanding and made the country visit not only very informative and educational but also very agreeable.

The Committee would like to express its special gratitude to Mr. B.K. Patodia, Chairman and Managing Director, GTN Group, member of the ITMF Board and the Indian member of the ITMF Spinners Committee as well as to Mr. Suresh Kotak, Chairman and Managing Director of Kotak Ginning & Pressing Industries, who organised this visit with the assistance and support of Mr. Mahesh C. Thakker of Perfect Cotton and Mr. Suresh Joshi of Kotak Ginning & Pressing Industries.

The Committee appreciated also that the incoming Executive Director of the International Cotton Advisory Committee (ICAC), Mr. José Sette, accepted the invitation of the Spinners Committee to join the group during the visit. The Committee welcomed other guests, Mr. Bashir Ali Mohammad, Chairman and Managing Director, Gul Ahmed/Pakistan and ITMF Past President, and Mr. Jas Bedi, Director, Bedi Investments/Kenya and ITMF Board Member, who joined the Committee during these intensive 7 days.

Contents

Participants	2
Executive Summary	4
Individual Visits	8
Statistical Appendix	16

Participants

Committee Members & Secretariat

Enrique Crouse	South Africa	Prilla 2000
Andrew Macdonald	Brazil	Tavex Group (Committee Chairman)
B.K. Patodia	India	GTN Group
Vijay Shankar	Malaysia	Recron Malaysia
Walter Simeoni	South Africa	WS International
Christian Schindler	Switzerland	ITMF

Invited Guests

Bashir H. Alimohammad	Pakistan	Gul Ahmed (ITMF Past President)
Jas Bedi	Kenya	ACTIF (ITMF Board Member)
Suresh Kotak	India	Kotak Ginning & Pressing Industries
José Sette	USA	ICAC



Objective of the visit

- To review the situation of cotton growing and ginning in India as compared to 5 years ago when the ITMF Spinners Committee visited India in 2008
- To evaluate the sustainability of BT cotton in India over the next years
- To evaluate the evolution of BCI cotton in India
- To evaluate the ginning and detect improvements
- To evaluate the situation regarding contamination of cotton
- To evaluate the potential for production over the next years
- To evaluate the local centres marketing system
- To note the comments of the textile industry as regards their view on cotton in India

From November 10 – 16, 2013 the ITMF Spinners Committee visited India on behalf of ITMF. The Committee visited cotton-growing areas in the states of Gujarat, Madhya Pradesh, and Maharashtra and had formal meetings with Government and association officials in the city of Mumbai and Nagpur.



EXECUTIVE SUMMARY

Overall Comments/Impressions

- **To review the situation of cotton growing and ginning in India as compared to 5 years ago when the ITMF Spinners Committee visited India in 2008**

Indian Cotton generally maintains the traditional intrinsic quality in the field, though still hampered by some poor ginning practices and contamination.

The Committee had the impression that the quality of farming has significantly improved since the last visit in 2008. The fact that approx. 95% of the cotton cultivated in India is BT cotton shows that genetically modified cotton is well accepted in India, both by farmers and by the spinning industry in India and abroad.

The micronaire ranges from 3.0-3.8 of DCH-32 needs to be improved whilst the average in Shankar-6 is good. The Committee would like to stress the importance of this cotton characteristic for the spinning and downstream industry. A narrower range rather than sticking to 3.5-4.9 should be encouraged to suit better today's sophisticated spinning industry.

Seed varieties and cotton from different farmers are still being mixed at the regional market places and gins. Since the cotton characteristics are similar in a given region due to similar soil and climate conditions such mixing may not be regarded as problematic today. However constant care must be taken that cottons from different regions are not mixed, as today, based on HVI results, mixing will deteriorate the overall value of the cotton.

The ginning out-turn in India is approx. and on average 36% and hence below the 40% of other countries. This leaves room for further improvement.

- **To evaluate the sustainability of BT cotton in India over the next years**

While yields have been improving significantly since the introduction of Bt cotton in India (Bollgard I) some 12 years ago, recently they stagnated. In 2007/2008 cotton yield peaked at 530 kg/hectare but have declined thereafter to approximately 490 kg/hectare. The decline in yields seems to result from the bollworm developing resistance, which in return reduces yields. Urgent work will be required to introduce new traits into the Bt seeds to maintain the pressure on this pest.

As the average yield in India is below the world average cotton production could be further increased in the future. With more than 1'000 Bt brands available not all are suited for rain-fed cotton. Often they are sowed relatively late to avoid re-sowing which in turn leads to moisture stress during the peak boll formation after the rain season. The main advantage of straight varieties is that farmers can reuse seeds and can sow earlier (before the start of the monsoon) thus reducing the moisture stress for the plant. In other countries Bt cotton is only available as few straight varieties. Another reason for the below-average yield is a consequence of a large portion of cotton acreage that is on rain-fed (60%) while only a smaller portion is irrigated (40%).

- **To evaluate the evolution of BCI cotton in India**

BCI cotton is making important in roads into the Indian marketing system, and with the change to marketing with the Mass Balance System the tendency for this program to expand is important for India as textile exporting country. Initially premiums for the growers and ginners can be justified. In the long term these will disappear as the production increases.

- **To evaluate the ginning and detect improvements**

The Committee was impressed by the improvements seen in the gin yards visited, and the pre cleaning equipment, which has been installed extensively in the gins since the last visit. The patios of the ginning & pressing factories where the seed cotton is received were concreted with a covered area. The degree of mechanization had improved with tractors and large sucking systems feeding the gins. Most gins had installed pre-cleaning machines, which pre-clean the cotton and remove some of the immature bolls. This pre-cleaning of the seed cotton is definitely preferred to the system of cleaning the cotton lint after ginning. In some gins the Committee noticed lint cleaners, after ginning, which tend to damage the cotton increasing the nep count as well as the short fibre content.

Cleanliness inside the gins continues to be a serious problem. To improve the ginning quality, safeguard the health of the workers, and reduce the risk of fires, i.e. housekeeping in the gins must be placed as a high priority for India.

- **To evaluate the situation regarding contamination of cotton**

The high consciousness of the problem of contamination was applauded, however it is essential for Indian cotton to obtain the premiums it deserves, to take even more effort in this respect. In some gins that were visited by the Committee, the cotton presses were being loaded by workers dressed in multi coloured clothes, and without any form of head covering. Some workers were even jumping into the press box. While the patios were cemented and clean, sources of contamination like the workers uniforms could be identified as only one example.

- **To evaluate the potential for production over the next years**

Cotton production in India increased considerably in the past decade from approx. 23.0 million bales (170 kg each) in 2004/2005 to approx. 29.5 million bales in 2007/2008 and to approx. 34.0 million bales in 2012/2013. The Committee shares the view that lifting the average yield can increase cotton production in India further. In this connection it will be important that improving yields should not lead to a deterioration of the micronaire.

The Committee is of the opinion that preventive measures could also contribute to higher yields. There is a wide range of preventive measures, from exact weather forecast together with more rapid observation of the development of pests, to allow for quick adaptation to the circumstances.

- **To evaluate the local centres marketing system**

The Committee experienced first-hand the open and transparent auction system through which the cotton is marketed as farmers bring their seed cotton to the market yard. On arrival the agents for the ginners first inspect the quality of the cotton. There is one grade only (1 1/8 (=28.4 mm), 28 g/tex and micronaire 3.7-4.5) with small discounts and premiums. The lots per transport vehicle, be it cart or truck are then auctioned where they stand, and once a farmer accepts to sell his cotton, the prices must be above the Minimum Support Price, (MSP). A note of the transaction is made in the register of the market yard controller. The farmer may leave his seed cotton for a few days free of charge at the centre prior to selling,

or waiting for payment. The seed cotton is weighed, and then delivered by the farmer at the respective gin against payment in cash or check. The ginner pays a commission of 1.5%. The market fee is 0.5%.

Alternatively, a ginner can buy seed cotton directly from farmers, but the transparent market yard system and the access to information about international cotton prices guarantees that the farmers are getting a market oriented price for their cotton. Sanctity of contract is a highly valued principle at the market yards.

- **To note the comments of the textile industry as regards their view on cotton in India**

Reports from the textile industry during visits to important textile groups and in meetings with the textile association were positive as regards the development of cotton in India. Contamination is improving and the ample supply of cotton is supporting the rapidly growing textile industry.

The cotton industry would welcome the renewal of the "TMC" as it had an enormous positive impact on the cotton industry in India.

GENERAL COMMENTS

Organic Cotton

Even though India is the largest producer of organic cotton in the world, organic cotton is still a niche market. Nevertheless, the production of organic cotton can be economical. While yields are in general approx. 25% below the level of non-organic cotton, costs are approx. 30% lower, if the proper farming practices are applied correctly (e.g. drip irrigation reduces water consumption by 50%). Like in the non-organic cotton industry also the organic cotton industry is struggling with rising labour costs. The Committee learned that currently a premium of 2-4% is paid for organic cotton.

Organic cotton farmers in India informed the Committee that in comparison to a few years ago organic cotton is not just seen any more as a commodity but as an important raw material and important part of the cotton textile supply chain. The visibility of the cotton farmers and the cotton spinners is better since the "green movement" (sustainability and transparency) is gaining more influence and support among customers and therefore also among retailers and brands. According to organic farmers the interest of retailers and brands in organic cotton and the entire value chain has increased significantly.

Contamination

The investments in the cotton industry that have taken place were significant since the introduction of the TMC in the year 2000 and have helped reducing the level of contamination. According to CIRCOT the trash level is down from 4-5% to 1-2% and the amount of contamination could be reduced significantly (95 g/10'275 kg of lint cotton). The main reason for this very positive development is the higher degree of automation and mechanization in the ginning and pressing factories. The reduction of workers in the factories automatically eliminates many sources of contamination.

Nevertheless, contamination is still a serious problem that the Indian cotton industry is facing. One indication for this is the fact that some Indian cotton spinners are paying a premium for contamination free Indian cotton. They would only source cotton from gins that pre-qualified. The above-average level of contamination found in Indian cotton means that Indian cotton is sold at a discount.

The Committee was informed that the reduction in the level of contamination of Indian cotton is visibly due to efforts from farmers to ginners. The TMC certainly played a decisive role in this positive development. Improved education on and better awareness about the importance of contamination at the farm and gin level also contributed to lowering the level of contamination.

Sampling

Only 2% of all cotton bales are drawn and tested as compared to 100% in countries like the Australia, Brazil or the US. In Gujarat there is only one ginner who is doing individual bale testing with HVI. The method of drawing the sample is still very "archaic". A relatively large piece of cotton is cut with an axe out of a bale destroying a significant part of the cotton fibers. As a long-term objective the Indian cotton industry should consider developing a plan how each and every bale could be drawn and tested with High Volume Instrument (HVI) testing. This would allow to further improve the quality of and therefore also the prices for the Indian cotton. Traceability and HVI testing are more and more becoming a necessity and precondition in today's cotton textile value chain. The Committee was happy to hear that the Cotton Association of India (CAI) is pursuing exactly this objective.

Research

The Committee was once again during the visits impressed by the extent of research being undertaken, by many institute and organisations, with regard to crop improvement, production and protection.

Transportation

A major problem for the Indian cotton industry is the relative high cost of transportation of cotton in India. For example, the costs of transportation of cotton from Gujarat to Mumbai (approx. 3.5 US Cents/lb) are higher than from Mumbai to a Chinese port (approx. 1.5 US Cents/lb).

INDIVIDUAL VISITS

November 11, 2013

- **Visit of a ginning & pressing factory on the way from Indore / Madhya Pradesh to Khargone / Madhya Pradesh**

The Committee visited a modern ginning & pressing factory in Khargone which was equipped with machines that were pre-cleaning, ginning and pressing the cotton in a fully automated process from the paved yard to the pressing machine. The factory was equipped with double-roller gins.



- **Visits of cotton fields**

The Committee visited various cotton fields in the region of Khargone. The plants tended to be rather taller than normal but very healthy. We would prefer the strength of the plant to go into the bolls rather than using energy for growth. The cotton will be more uniform and therefore better quality with smaller plants reaching no more than about 80 cm high.



- **Meeting with Khargone Ginners Association and a group of farmers / Madhya Pradesh**

The Committee met with the Khargone Cotton Ginners Association and a group of farmers discussing many topics ranging from gin-out-turn to contamination. Also this ginning & pressing factory was equipped with double-roller gins.

November 12, 2013

- **Visit of an organic cotton farm / Madhya Pradesh**

Visit of a large organic cotton farm. The Committee was impressed with the concept but the plants varied greatly and showed evidence of aphid attack leading to the presence of stickiness on the cotton. The method of attracting insects was extremely simplistic for such an endeavour. Much more work will be required to achieve a successful a program on a large scale. The visit was followed by a lengthy discussion with various cotton farmers.



- **Visit of a ginning & pressing factory (Sagar Industries) / Madhya Pradesh**
On its way to a lunch meeting the Committee visited another ginning & pressing factory. The factory was also equipped with double-roller gins. The gin was rather typical of the roller gins visited during this trip and the importance of good housekeeping cannot be overly stressed.



- **Lunch meeting with Mr. Bharat Shah (Chairman, Amit Group of Companies) and Mr. Amit Shah (CEO, Spectrum International)**
Mr. Amit Shah gave a presentation with the title “*Sustainable Fibers: A Business Case*” in which he laid out how cotton developed from a commodity product to a brand product that can be environmentally and ethically fashionable (e.g. H & M’s objective is: “*By 2020, the company wants all of the cotton used in its products to come from sustainable sources*”).
- **Dinner meeting with ginners and traders hosted by Mr. Suresh Kotak, in Rajkot / Gujarat**
The Committee had the honour to meet with local ginners and cotton traders during a traditional evening function.

November 13, 2013

- **Visit of the market yard in Rajkot / Gujarat**
The Committee saw and experienced first-hand how the seed cotton is transported to and from the market yard and how the price is negotiated between the farmers and the ginners/traders. The method is extremely transparent and surprisingly secure. The controls by the management are very strict and disputes are very rare.



- **Meeting with the management of the market yard / Gujarat**

The discussion with the management of the market yard in Rajkot helped to understand the process of fixing the price of the seed cotton. The smart phone has also conquered the markets as the local gin representative checks the market for the latest price quotations.



- **Meeting with Saurashtra Cotton Ginners Association / Gujarat**

The Committee had a very useful exchange of ideas.

- **Visit of a ginning & pressing factory and oil crushing & refining factory / Gujarat**

Towards the end of the day the Committee visited another cotton gin that was equipped with standard double-roller gins.



November 14, 2013

- **Visit of Birla Century (Division of Century Textiles & Industries Ltd.) in Baruch / Gujarat**

The Committee was welcomed by Mr. R. K. Dalmia, President, Mr. U.C. Garg, Executive President, and Mr. R. C. Panwar JT President (Marketing) of Century Textiles & Industries Ltd., who showed the group the fully integrated textile mill from spinning to the finished products. The textile mill was equipped with the latest textile machinery equipment with a very high degree of automation. Century Textiles had also built its own waste water treatment plant.



The discussion with the management showed that contamination is the main concern for a textile company with regard to cotton. The Committee was impressed by the excellent set up of the entire textile mill and the outstanding management.

The Committee was invited to lunch where the participants also celebrated the birthday of Mr. B.K. Patodia.

- **Visit of a ginning & pressing factory on the way from Baruch to Vadodara / Gujarat**
The factory visited was equipped with double-roller gins. In comparison to other ginning & pressing factories visited the level of automation and the degree of cleanliness was disappointingly lower. The press was being filled in the old traditional way of workers getting into the press box and trampling down the cotton. Today this would be considered a serious health and safety risk by the Western markets, as well as contaminating the cotton with loose fibres. The Committee must reinforce once again the importance of modernising this practice, which will eventually lead to action by the foreign buyers of Indian textiles.

November 15, 2013

- **Meeting with the Central Institute for Research on Cotton Technology (CIRCOT) in Mumbai**
The Committee had a very informative meeting with Dr. S. K. Chattopadhyay, Director of CIRCOT, and his colleagues. The Committee was informed about the ongoing activities of CIRCOT, especially in the area of ginning which included also a discussion on the development of contamination in Indian cotton. Alternative uses for cotton were also discussed as well as a show of fabrics made from various combinations of natural fibres. The Committee as on previous occasions was immensely impressed with the work of this fine organisation.



- **Meeting with the Textile Commissioner, Government of India, in Mumbai**
The Committee had an interesting and fruitful exchange of thoughts and views with the Textile Commissioner, Mr. A. B. Joshi and his colleagues.
- **Meeting with the Cotton Association of India (CAI) in Mumbai**
The Committee had a meeting with members of the CAI at which the participants discussed topics such as cotton contamination, HVI measurement or future cotton production and trade. The meeting was most opportune as the orderly evolution the marketing of Indian cotton is being well managed by CAI. The Committee made an extensive visit to the sample room of the Association. The President of CAI, Mr. Dhiren Sheth hosted a lunch for the Committee where the Committee members could continue their discussions with the colleagues from CAI.



- **Dinner meeting with the Confederation of Indian Textile Industry (CITI) in Mumbai**

The Committee was invited by Mr. Prem Malik, Chairman of CITI, and Mr. D. K. Nair, Secretary General of CITI to a dinner meeting where the Committee could discuss short- and long-term issues in connection with cotton production and consumption in India. Many aspects of the cotton business was discussed and the dinner proved to be a very useful exchange of opinions and ideas

November 16, 2013

- **Visit of the Central Institute for Cotton Research (CICR) in Nagpur / Maharashtra**

The Committee followed a presentation about the Institute's research work.

- **Meeting with Dr. K. R. Kranthi, Director of CICR, and Dr. C. D. Mayee, former Director of CICR**

The combined knowledge of CICR is very extensive and the work of both Dr. Kranthi and Dr. Mayee has been recognised world-wide. The Committee was honoured to be received by these gentlemen and their colleagues.

The Committee was informed about the research and development work of the Institute, especially with regard to the role of genetically modified cotton, the concern that yields have stagnated somewhat in the last few years and how they see developments over the next 10 years. They are confident that with the on-going research new levels of yield and quality can be achieved to keep pace with the demands from the world cotton industry for quality fibre at competitive prices.

The CICR also undertakes training. At the moment of the visit they were hosting a group of trainees from various African countries.



Afterwards the Committee was taken to the area with the largest collection of native species of cotton being cultivated for research purposes.



- **Visit of Bajaj Steel Industries Ltd. in Nagpur / Maharashtra (manufacturer of ginning machinery)**

The Committee visited two plants in which roller gins are produced. Mr. Rohit Bajaj, Managing Director, and Mr. Lav Bajaj, Executive Director, hosted a lunch where the Committee had a chance to meet and discuss with representatives from the local and regional cotton industry.

June 2014

STATISTICAL APPENDIX

State-wise Area, Production and Yield of Cotton in India, 2011-12

	State	Area (in 100'000 ha)	Production (in 100'000 bales of 170kg)	Yield (kg lint/ha)
1	Punjab	5.60	18.50	561.61
2	Haryana	6.40	26.00	689.55
3	Rajasthan	4.70	17.50	632.98
	North Total	16.70	62.00	630.76
4	Gujarat	29.60	120.00	688.72
5	Maharashtra	41.20	74.00	304.97
6	Madhya Pradesh	7.10	18.00	433.43
	Central Total	77.90	212.00	462.47
7	Andhra Pradesh	18.80	56.00	505.65
8	Karnataka	5.50	14.00	429.60
9	Tamil Nadu	1.30	6.50	830.83
	South Total	25.60	76.50	506.82
10	Orissa	1.00	2.50	416.67
11	Others	0.60	2.00	739.13
	Total	1.60	4.50	-
12	Loose Lint	-	-	-
	All India	121.80	355.00	495.57

State-wise Area, Production and Yield of Cotton in India, 2012-13 (estimated)

	State	Area (in 100'000 ha)	Production (in 100'000 bales of 170kg)	Yield (kg lint/ha)
1	Punjab	5.10	20.00	671.94
2	Haryana	6.10	24.00	664.50
3	Rajasthan	4.50	16.00	604.44
	North Total	15.70	60.00	649.68
4	Gujarat	24.00	87.00	616.25
5	Maharashtra	41.50	74.00	303.42
6	Madhya Pradesh	6.10	18.00	503.29
	Central Total	71.60	179.00	425.36
7	Andhra Pradesh	22.70	76.00	569.41
8	Karnataka	4.80	13.00	455.67
9	Tamil Nadu	1.30	6.00	809.52
	South Total	28.80	95.00	560.76
10	Orissa	1.20	4.00	571.43
11	Others	0.50	2.00	680
	Total	1.70	6.00	-
12	Loose Lint	-	-	-
	All India	117.80	340.00	490.95

Cotton Balance Sheet from 2004/05 to 2013/14 (Season from Oct.-Sept.)

Quantity in lakh bales of 170 kg

	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12	12/13*	13/14*
Supply										
Opening Stock	21.00	72.00	52.00	47.50	35.50	71.50	40.50	45.80	40.00	35.00
Crop	243.00	241.00	280.00	307.00	290.00	305.00	339.00	355.00	365.00	375.00
Import	12.00	5.00	5.50	6.40	1.00	6.00	2.40	12.00	14.60	17.00
Total Supply	276.20	318.00	337.50	360.90	335.50	382.50	381.90	412.60	419.60	427.00
Demand										
Mill Cons.	164.00	180.00	194.90	195.70	190.00	219.00	221.80	223.10	250.10	258.00
S.S.I. Cons.	16.60	19.00	21.30	22.10	20.00	23.00	24.50	21.10	23.00	24.00
Non-mill Cons.	14.50	20.00	15.90	19.10	19.00	17.00	13.40	10.00	10.00	15.00
Total Cons.	195.10	219.00	232.10	236.90	229.00	259.00	259.70	254.20	283.10	297.00
Export	9.10	47.00	58.00	88.50	35.00	83.00	76.50	129.60	101.40	90.00
Total Demand	204.20	266.00	290.10	325.40	264.00	342.00	336.20	383.80	384.50	387.00
Closing Stock	72.00	52.00	47.50	35.50	71.50	40.50	45.80	29.00	35.00	40.00
* provisional as estimated by the Cotton Advisory Board (CAB) on Oct. 16, 2013										

Area, production and productivity of cotton in India from 1950-51 onwards

Year	Area in lakh hectares	Production in lakh bales of 170 kg	Yield kg per hectare
1950-51	58.82	34.30	99
1960-61	76.10	60.12	134
1970-71	76.05	56.64	127
1980-81	78.23	78.00	169
1990-91	74.39	117.00	267
2000-01	85.76	140.00	278
2001-02	87.30	158.00	308
2002-03	76.67	136.00	302
2003-04	76.30	179.00	399
2004-05	87.86	243.00	470
2005-06	86.77	241.00	472
2006-07	91.44	280.00	521
2007-08	94.14	307.00	554
2008-09	94.06	290.00	524
2009-10	103.10	305.00	503
2010-11	111.42	339.00	517
2011-12	121.78	353.00	493
2012-13	119.78	365.00	518
2013-14	115.53	375.00	552

Source: Cotton Advisory Board

Cotton Balance Sheet

Quantity in lakh bales of 170 kg

Item	01-02	02-03	03-04	04-05	05-06	06-07
Supply						
Opening stock	29.00	40.00	24.00	21.00	72.00	52.00
Crop size	158.00	136.00	179.00	243.00	241.00	280.00
Imports	25.26	17.67	7.21	12.17	5.00	5.53
Availability	212.26	193.67	210.21	276.17	318.00	337.53
Demand						
Mill consumption	147.00	142.42	150.39	163.98	180.00	194.89
Small Mill consumption	11.70	11.63	13.00	16.57	19.00	21.26
Non-Mill consumption	13.06	14.78	13.71	14.48	20.00	15.88
Total consumption	171.76	168.83	177.10	195.03	219.00	232.03
Export	0.50	0.84	12.11	9.14	47.00	58.00
Total disappearance	172.26	169.67	189.21	204.17	266.00	290.03
Carry forward	40.00	24.00	21.00	72.00	52.00	47.50

continued

Item	07-08	08-09	09-10	10-11	11-12	12-13*	13-14**
Supply							
Opening Stock	47.50	35.50	71.50	40.50	45.77	40.00	35.00
Crop Size	307.00	290.00	305.00	339.00	367.00	365.00	375.00
Imports	6.38	10.00	6.00	2.38	7.51	14.59	17.00
Availability	360.88	335.50	382.50	381.88	420.28	419.59	427.00
Demand							
Mill consumption	195.67	190.00	219.00	221.77	223.59	250.14	258.00
Small Mill consumption	22.08	20.00	23.00	24.46	22.12	23.02	24.00
Non-Mill consumption	19.13	19.00	17.00	13.38	5.00	10.00	15.00
Total consumption	236.88	229.00	259.00	259.61	250.71	283.16	297.00
Export	88.50	35.00	83.00	76.50	129.57	101.43	90.00
Total disappearance	325.38	264.00	342.00	336.11	380.28	384.59	387.00
Carry forward	35.50	71.50	40.50	45.77	40.00	35.0	40.0

*As estimated by CAB in its last meeting held on 1-11-2013

Source: Cotton Advisory Board

Production of Spun-Yarn (Non-SSI & SSI Units) in Million kg

Year	Cotton Yarn	Blended Yarn	100% Non-Cotton Yarn	Total Yarn
91/92	1'450	234	122	1'806
92/93	1'569	247	125	1'941
93/94	1'697	305	140	2'142
94/95	1'696	346	158	2'200
95/96	1'894	395	196	2'485
96/97	2'148	484	162	2'794
97/98	2'213	583	177	2'973
98/99	2'022	595	191	2'808
99/00	2'204	621	221	3'046
00/01	2'267	646	247	3'160
01/02	2'212	609	280	3'101
02/03	2'177	585	319	3'081
03/04	2'121	589	342	3'052
04/05	2'272	585	366	3'223
05/06	2'521	588	349	3'458
06/07	2'824	635	354	3'813
07/08	2'948	677	378	4'003
08/09	2'896	655	361	3'912
09/10	3'079	707	407	4'193
10/11	3'490	797	426	4'713
12/13 (P)	3'583	828	457	4'868
April-August 13/14 (P)	1'697	358	199	2'165

P = Provisional

Production, Import & Export of Cotton Yarn in Million kg

Year	Production	Import	Export	Imports as % of Production	Exports as % of Production
05/06	2'521	4.56	552.16	0.18	21.90
06/07	2'824	7.95	614.72	0.28	21.77
07/08	2'948	7.14	664.14	0.24	22.53
08/09	1'696	346	158	2'200	19.18
09/10	3'079	5.35	589.02	0.17	19.13
10/11	3'489	4.24	696.25	0.12	19.95
11/12	3'126	5.02	752.40	0.16	24.06
12/13	3'583	8.49	1109.55	0.24	30.97
13/14 (P)	1'607 (1'447) Apr/Aug	2.70 (1.70) Apr/June	279.39 (242.51) Apr-June	0.29	29.53
P = Provisional					

Production of Man-Made Fibre, Filament Yarn, Spun Yarn and Cloth

Period	Man-Made fibre	Man-Made filament yarn	Cotton yarn	Blended & 100% Non-cotton yarn	Total Spun Yarn
	kg	kg	kg	kg	kg
2009-10	1'268	1'523	3'079	1'114	4'193
2010-11	1'285	1'550	3'490	1'223	4'713
2011-12	1'234	1'463	3'126	1'246	4'372
2012-13	1'263	1'371	3'583	1'285	4'868
2013-14 (P)	1'316	1'309	3'936	1'380	5'316
P = Provisional					

Cloth (in million)						
Period	Mill sector	Decentralized sector				Grand Total (Exc. Khadi, Wool & Silk)
		Hand loom	Power loom	Hosiery	Total	
	Sq. mtr.	Sq. mtr.	Sq. mtr.	Sq. mtr.	Sq. mtr.	Sq. mtr.
2009-10	2'016	6'806	36'997	13'702	57'505	59'521
2010-11	2'205	6'907	38'015	14'634	59'556	61'761
2011-12	2'313	6'901	37'445	12'946	57'292	59'605
2012-13	2'418	6'952	38'038	14'541	59'531	61'949
2013-14 (P)	2'560	7'116	37'712	15'931	60'759	63'319
P = Provisional						