

MAJOR WORLD COTTON PRODUCERS

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Abstract

Nearly 80 percent of the world's cotton output is harvested by seven countries, all but one is above the equator. As of December 1997, world cotton production for 1997/98 is forecast at 90.1 million 480-pound bales, up 1 percent from the 1996/97 crop. World area is forecast to increase just under one-half a percent while yield is up a similar amount from a year ago. The world's largest cotton producers, the United States and China, are projected to account for 42 percent of global production, down from 43 percent last year.

Introduction

The top seven producers of 1997/98, including the United States and China, are expected to contribute 77 percent of the world cotton output compared with 79 percent in 1996/97. Most of the major producers had, large crops; however, Pakistan, Uzbekistan, and Australia are the only major producers forecast to exceed last year's output level. Production in the other major producers were down because of insect damage, disease, drought, and/or floods. This report highlights the top seven cotton producing nations which include the United States, China, India, Pakistan, Uzbekistan, Turkey, and Australia. These countries are estimated to produce 69.2 million bales of cotton this season and are ranked based on estimated production for 1997/98.

Major Producers

The United States is currently the world's largest cotton producer. Output for 1997/98 is estimated at 18.8 million bales, down 0.1 million from last year as lower yields more than offset an increase in area.

China is the world's second largest cotton producer and is estimated to produce nearly one-fifth of the global output this year, despite unfavorable growing conditions on the North China Plain. China's 1997/98 cotton production is estimated at 18.5 million bales, down 0.8 million or 4 percent from last year. The projected yield of 895 kilograms per hectare is slightly higher than last year's and well above the 5-year average of 784 kilograms per hectare. Serious drought in July and August stressed non irrigated cotton in several key cotton-producing provinces, including Shandong, Henan, and Shanxi. Crop conditions improved in Jiangsu, Anhui, and eastern Shandong following beneficial rain in August, but the weather continued unfavorably hot and dry in the western part of the North China Plain. Bollworms were reported in several prefectures in Shandong and Xinjiang, but the insect

did not pose a significant problem as in past years. High yields are projected in Xinjiang Province which enjoyed normal weather this past summer.

Cotton area in China is forecast at 4.5 million hectares, down 5 percent from last season and the lowest planted area since 1986. The area decline continues a downward trend that began in 1995. Farmers reduced cotton area in 1997 for several reasons, including higher labor and production costs compared to other crops, and past chronic problems with bollworm infestations. Cotton area continues to increase in the northwest Province of Xinjiang, partially offsetting area movement to other crops on the North China Plain. Xinjiang's soils and climate are well suited to cotton cultivation and yields are among the highest in the country. However, future area expansion in that province will be limited by irrigation supplies, since it does not receive enough annual rainfall to produce cotton without irrigation.

The 1997/98 Indian cotton crop is forecast at 12.8 million bales, 7 percent lower than the record crop of 13.8 million produced in 1996/97. Heavy rains in northern India over the three months of October to December have reduced the crop to an estimated 12.8 million 480-pound-bales. These rains concentrated in the States of Punjab, Haryana, and Rajasthan reduced quality and lowered yield expectations. Total area is forecast at 9.0 million hectares, 2 percent less than last year's record 9.2 million. The forecast yield of 310 kilograms per hectare is 5 percent lower than last year's record of 327 kilograms per hectare, but only 1 percent higher than the five-year average. This year's monsoon arrived two weeks later than normal, creating concerns of dryness for some crop areas. Since that time, the rains have proven adequate. Monsoon rains were beneficial for proper plant growth and encouraged additional late-season planting activity in the central and southern states. The last areas planted were small pockets in Andhra Pradesh, Karnataka, and Tamil Nadu, which were sown during August and September. India's cotton crop continues to progress well under favorable weather across the major cotton growing areas of the central and southern regions. There were no reports of any major insect infestations except for some minor incidences of bollworms and whiteflies in the northern region.

The Pakistani cotton crop for 1997/98 is forecast at 7.5 million bales, up 3 percent from last year's insect-reduced crop. However, this forecast is down 0.2 million bales from November as heavy rain in the northern cotton area of the Punjab caused both yield and quality losses. Area is forecast at 3.2 million hectares, unchanged from 1996/97. Yield is forecast at 510 kilograms per hectare, below the five-year-average of 526 kilograms, but higher than the 497 kilograms per hectare for the 1996/97 insect damaged crop. Weather-until recently, water availability, and low insect pressure have been favorable for crop development and fruit formation compared to last year. Irrigation water generally has been adequate. The availability of tube-well water compensated

for the shortages in some pockets of Punjab caused by a canal breach. Widespread and well-spaced monsoon rains from mid-July through August supplemented water requirements. The widespread monsoonal rains across the cotton growing areas reduced whitefly populations. In addition, farmers have successfully used specific pesticides to help control whiteflies and bollworms. The recent heavy rains and floods have generated stories of extensive damage; however, recent assessments indicate only limited damage. Despite some losses, crop conditions are significantly better than last year.

Uzbekistan's production for 1997/98 is estimated at 5.4 million bales, up 0.7 million or 14 percent from last year. Lint yield is forecast to rebound to 784 kilograms per hectare, up 14 percent from last year. Despite unusually heavy rainfall during March and April that caused extensive replanting, the cotton crop benefitted from above-average temperatures during June as the crop advanced into the reproductive stage. Temperatures were above average during the harvest season which allowed for continued high yields. The 1996/97 crop was plagued by unfavorable weather from planting to harvesting. Just after emergence, the crop was damaged by cool, wet conditions reducing yield potential. Weather problems continued as late-season rains and cool weather combined to reduce both quality and yield.

Turkish cotton production in for 1997/98 is forecast at 3.3 million bales, down 0.3 million or 8 percent from 1996/97. The crop was planted about three weeks late due to cool spring weather. The late sown crop increased the possibility of another rain-hampered harvest similar to last season. During 1996/97, cotton output declined from a record 3.9 million bales produced in 1995/96, to 3.6 million, due primarily to rainy weather during the harvest resulting in a yield loss of approximately 7 percent and a reduction in fiber quality. The early seasonal rains, which arrived in September, were heaviest in Southeast and Aegean Regions, Turkey's largest producing areas. The rains continued into October, and with only an estimated 60 percent of the crop harvested in these regions, significant yield loss and quality damage occurred. The unfavorable harvest weather was compounded by a growing shortage of farm labor, resulting in a prolonged harvest period. This season, heavy rains again occurred over the cotton area; however, harvest was further along than last year.

Australian production for 1997/98 is estimated at a record 2.9 million bales, up 0.1 million or 4 percent from last year. High reservoir levels of at least 75 percent of capacity and heavy rains in the September/October period have boosted Australia's cotton production prospects in 1997/98. As a result, both irrigated and dryland cotton areas are projected to increase. The area planted is estimated at a record 430,000 hectares, up 35,000 or 9 percent from last year. Without the

shortages of irrigation water and soil moisture that hindered the Australian cotton industry in the recent past, a record 345,000 hectares of irrigated cotton is forecast to be planted in 1997/98, up 20,000 from 1996/97 irrigated area. After the November and December rains across New South Wales, dryland planting progress is estimated between 10,000 and 50,000 hectares.

WORLD MAJOR COTTON PRODUCERS

	480-LB BALES (1000)	% OF PRODUC- TION	YIELD (Kg/ha.)	AREA HAR- VESTED (1000 ha.)	% OF AREA	LINT MT (1000)
1997/98						
WORLD	90,110	100	577	33,977	100	19,619
FOREIGN	71,291	79	544	28,535	84	15,522
TOP SEVEN	69,219	77	608	24,772	73	15,071
China	18,500	21	895	4,500	13	4,028
United States	18,819	21	753	5,442	16	4,097
India	12,800	14	310	9,000	26	2,787
Pakistan	7,500	8	510	3,200	9	1,633
Uzbekistan	5,400	6	784	1,500	4	1,176
Turkey	3,300	4	1,026	700	2	718
Australia	2,900	3	1,468	430	1	631
Other	20,891	23	494	9,205	27	4,549
1996/97						
WORLD	89,172	100	573	33,870	100	19,415
FOREIGN	70,230	79	533	28,662	85	15,291
TOP SEVEN	70,461	79	615	24,935	74	15,341
China	19,300	22	890	4,722	14	4,202
United States	18,942	21	792	5,208	15	4,124
India	13,781	15	327	9,166	27	3,000
Pakistan	7,300	8	497	3,200	9	1,589
Uzbekistan	4,750	5	689	1,500	4	1,034
Turkey	3,600	4	1,054	744	2	784
Australia	2,788	3	1,537	395	1	607
Other	18,711	21	456	8,935	26	4,074

CHANGE FROM 1995/96

	480-lb BALES (1000)	BALES PERCENT CHANGE	AREA HARVESTED (1000 Ha)	AREA PERCENT CHANGE
WORLD	938	1	107	0
FOREIGN	1061	2	-127	-0
TOP SEVEN	-1242	-2	-163	-1
China	-800	-4	-222	-5
United States	-123	-1	234	4
India	-981	-7	-166	-2
Pakistan	200	3	0	0
Uzbekistan	650	14	0	0
Turkey	-300	-8	-44	-6
Australia	112	4	35	9
Other	2180	12	270	3

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Production Estimates and Crop Assessment Division, FAS, USDA