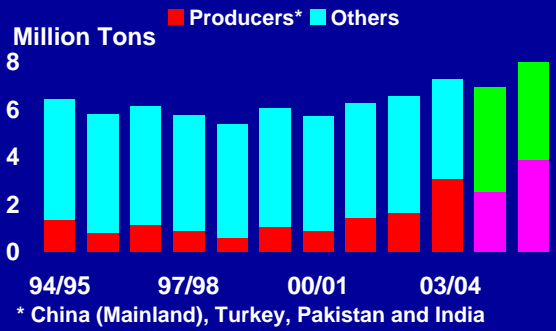


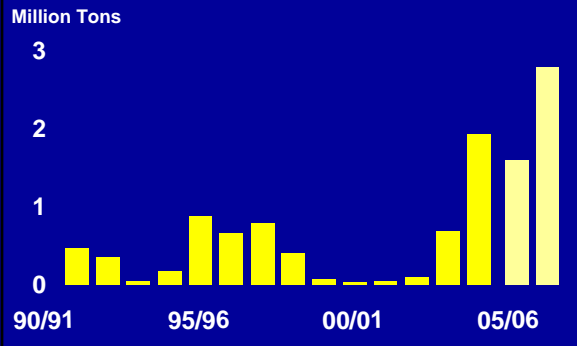


International Cotton Advisory Committee

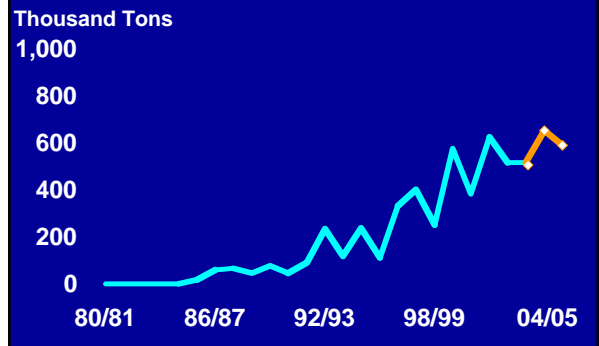
WORLD IMPORTS



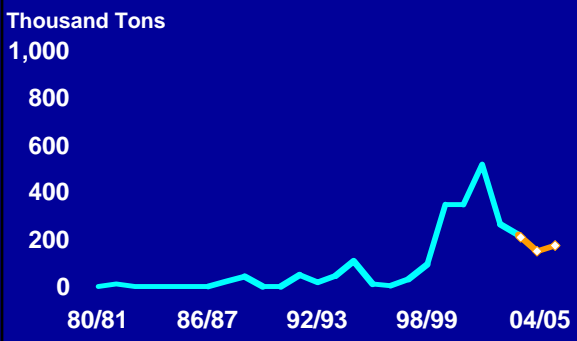
CHINA (MAINLAND) IMPORTS



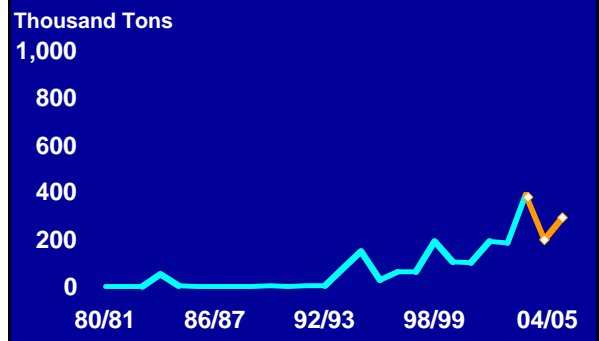
IMPORTS: TURKEY



IMPORTS: INDIA

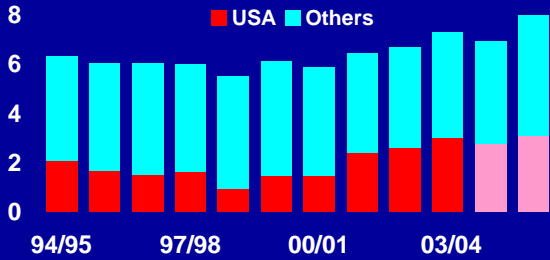


IMPORTS: PAKISTAN



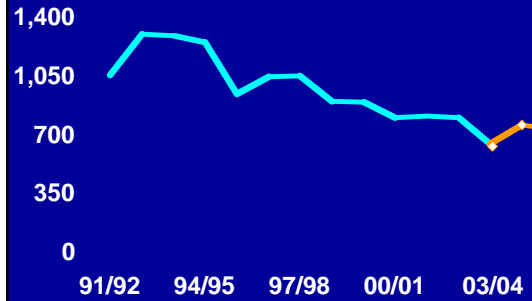
WORLD EXPORTS

Million Tons



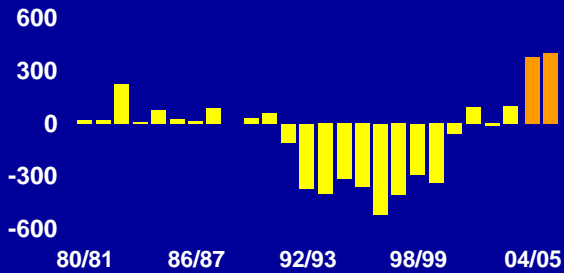
EXPORTS: UZBEKISTAN

Thousand Tons



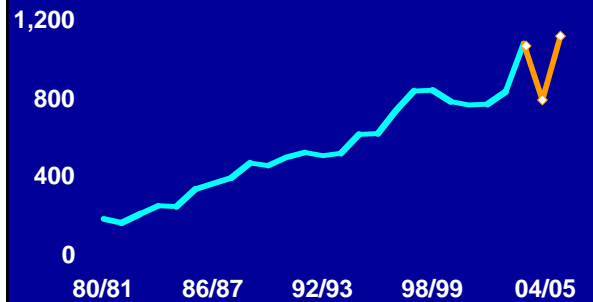
BRAZIL NET EXPORTS

Thousand Tons



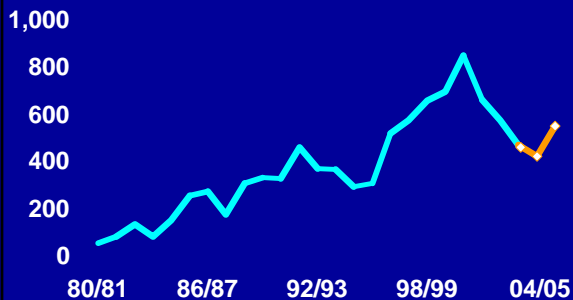
EXPORTS: CFA ZONE

Thousand Tons

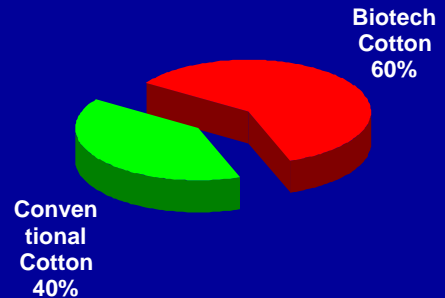


EXPORTS: AUSTRALIA

Thousand Tons

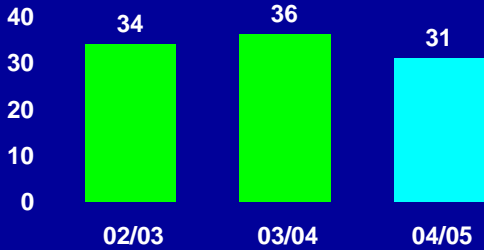


2004/05 COTTON MILL USE: ASIA AND OCEANIA



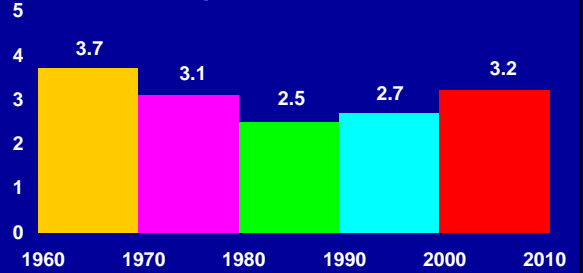
BIOTECH COTTON EXPORTS

Percent of World Trade



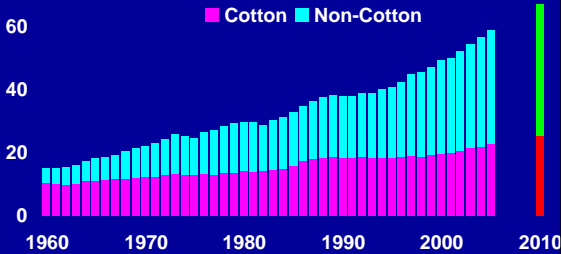
WORLD FIBER USE

Percent of Annual growth



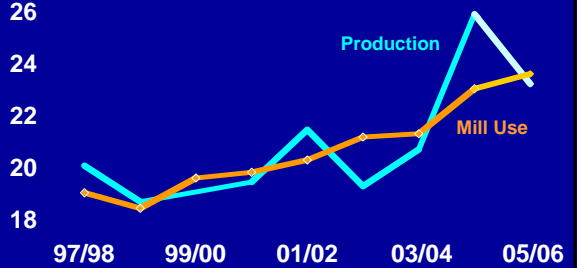
WORLD FIBER USE

Million Tons



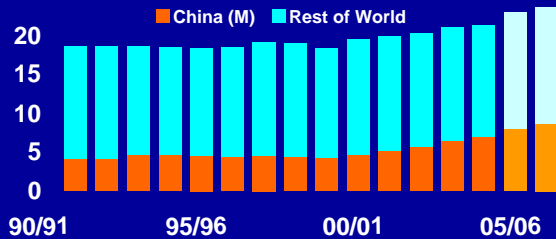
WORLD SUPPLY AND USE

Million Tons



COTTON MILL USE

Million Tons



CHINA (MAINLAND)

Exports of textiles and apparel in 2004 **\$97.4 billion**
 Share of world textile trade by 2005 **47%**
 Invested in textile industry in 2003 **\$10.7 billion**
 Textile sector generated **10% of GDP**

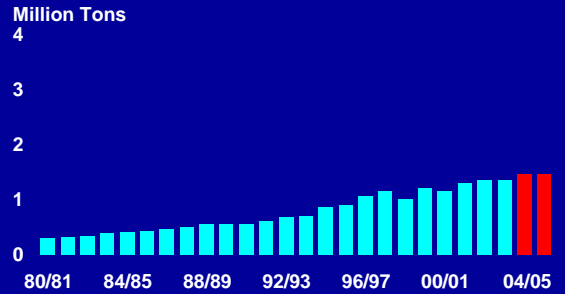
The largest: importer of textile machinery;
 textile economy;
 cotton and chemical fiber producer;
 producer and exporter of textiles.

Market share is projected to increase further

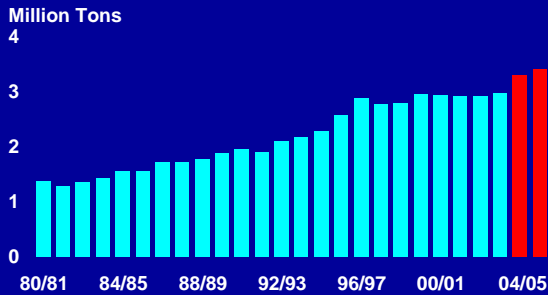
TEXTILE AND APPAREL EXPORT GROWTH BETWEEN 1980 AND 2003

| | |
|----------|-------|
| Turkey | 3203% |
| India | 647% |
| Pakistan | 770% |

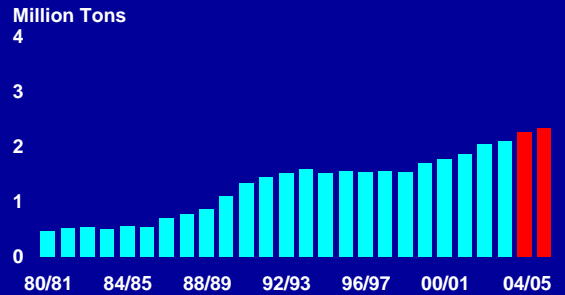
COTTON MILL USE: TURKEY



COTTON MILL USE: INDIA



COTTON MILL USE: PAKISTAN



2005 ELIMINATION OF QUOTAS EFFECTS

Intense competition, changes in market shares;
 Lower textile prices;
 Necessity to restructure and modernize textile sector;
 Emphasis on quality, innovation, reliability, demand responsiveness, market proximity, duty-free access;

Consumer demand will be stimulated by increased variety, supply and lower prices;

More efficient and modern textile industry will grow faster.

WORLD COTTON MILL USE AND IMPORTS

