

COUNTRY STATEMENT: GREECE

Cotton used to be and still is considered a national product of Greece. In this aspect great attention has been given, starting from the first step of production till the final product. This major agricultural crop with long tradition in Greece, accounts for almost 6% of total agricultural land and about 40,000 cotton farmers in the country. Cotton is grown mostly between 35⁰N and 38⁰N latitude. The main cotton production regions in Greece are located in Central and Northern Greece and more specifically in Thessaly, Central Macedonia, Thraki and Sterea Ellada.

The plains where cotton is cultivated have mostly alluvian soil, which is suitable for cotton. Several non biotech varieties of *Gossypium hirsutum* are successfully grown in Greece.

The bigger part of cotton areas are irrigated (90%) and a small percentage (10%) is grown under dry land conditions. All stages of cultivation process are fully mechanized.

Greece worldwide is one of the most significant countries in cotton production (13th place) as well in cotton exports (7th place) –USDA September 2023.

Interprofessional Cotton Organization (ICO, www.hca.org.gr) consisted of producers and ginners, was established in 2016 and approved by the decision of the Minister of Rural Development and Food dated 29-02-2016/1178/25334, which is replaced in the framework of the new EU Common Agricultural Policy (CAP) 2023-2027, by the 23-02-2023/127/5788 Ministerial Decision for year 2023 and by the 21/2/2024/128/53158 one for the year 2024. Its main objective is the development of cotton cultivation with the production of cotton adapted to the needs of the market with an update of improved cultivation methods and development of marketing strategies through quality certification systems as cotton is one of the first exportable products of our country.

- From the day of its foundation, it has managed to produce a targeted project with ICO main purpose which is none other than increasing the added value of the product and improving Greek cotton farming for the benefit of all cotton chain by strengthening several actions that promote the value of cotton farming. In this context ICO with the participation of National Centre for Quality Control, Classification and Standardization of Cotton controls 1% of the quality of Greek Cotton
- controls the seed-produced varieties in Greece
- contributes in issues related with proper irrigation use in cotton
- updates through events, across Greece, the results of the above programs
- participates in the Technical Committee for the drafting of Standards and Guidelines related to the Integrated Management System

- participates with its representatives in all important conferences, events throughout Greece for the promotion of cotton

Cotton Research

The Ministry of Rural Development and Food has the responsibility of coordination of cotton research in Greece. The Ministry of Rural Development and Food approves and funds special agricultural programs for the development of new cotton varieties. Most of the programmes are assigned to **Hellenic Agricultural Organization DIMITRA (ELGO DIMITRA)** www.elgo.gr which is a public sector organisation that enjoys administrative and financial autonomy and is supervised by the Ministry of Rural Development and Food. The institutes of ELGO DIMITRA that deal with cotton research are:

1. **Institute of Plant Breeding and Genetic Resources (IPBGR)** is located in Thessaloniki. Main research targets include the preservation, evaluation, and exploitation of genetic resources and the development of new cultivars with improved yield, quality characteristics higher sustainability and adaptation to climate change challenges. www.ipgrb.gr
2. **Institute of Industrial and Forage Crops** is located in Larisa, Centre Greece. The institute focuses on innovation, research, knowledge diffusion, technology and advisory services on soil/water resources, plant production, pest management and good agricultural practices. www.ipsw.gr
3. **The National Centre for Quality Control, Classification and Standardisation of Cotton** and its laboratories in Karditsa and Orchomenos, are in the division of the Institute of Industrial and Forage Crops of the ELGO DIMITRA. The centre provides services in quality control of cotton for the manufacturing industry (ginning), cotton seed companies, cotton merchants and other customers. It participates in international inter-laboratory tests (CSITC, BCRT, 7 tests / year).

Variety Approval and Seed Supply

The Variety Research Department of Cultivated Plants (VRICP) is responsible to examine all varieties that are intended to be cultivated in Greece. The procedure and methodology followed for registration of conventional varieties of field crops and vegetables are in accordance with general and specific technical rules harmonised with the Community Instructions 2002/53(70/457) and 2002/55 (70/458). Every cotton variety is examined in the cotton belt, for two years by the VRICP and compared with check varieties. The agronomic and quality data are checked on the basis of standard Rules and Regulations from the committee of the Ministry of Rural Development and Food. The committee

proposes which variety is suitable for cultivation in Greece and after that the variety is registered in the National Catalogue. After registration, the variety can be cultivated in Greece and in the European Union countries for ten years. www.varinst.gr

The ELGO DIMITRA is the only public organisation that is mandated for seed propagation and seed supply to farmers, but its share in national cotton market is very low. The main supply systems are catered by the private seed companies who propagate cottonseeds and also import cotton seeds. The private companies promote seeds through agronomists and sell the seeds through private stores. The seed companies in Greece are members of Greek Seed Trade Association (www.sepy.gr) and a majority of them deal with cotton.

For 2023 the main varieties and their distribution across the country are presented at the table below:

Name of the Variety	% Area
Varieties in Thessaly	
ST 402	13,53
CELIA	8,43
ELPIDA	7,86
OLIVIA	7,36
Varieties in Makedonia	
ST 402	37,44
ST 318	15,78
FIDEL	4,7
BA 1010	3,71
Varieties in Thraki	
ST 402	19,9
ST 318	10,1
PRG 9811	8,23
BA 1010	7,37
Varieties in Sterea Ellada	
ST 402	30,21
ARMONIA	11,61
ELPIDA	9,82
LIDER	8,66
Varieties in Others	
ST 402	22,89
PHY 983	15,6
FLORA	14,91
CELIA	7,88

Fertiliser and Pesticide Supply

In Greece there are both industries that produce fertilisers and companies that import fertilisers from abroad, mainly from Europe. Farmers buy fertilisers, seeds and pesticides from private stores. Farmers buy pesticides and other plant protection products mainly from private stores and cooperative stores. During the current cultivation period due to significant late sowing in the area of Thessaly, the application of rational irrigation and fertilisers was implemented. Worth mentioning that our country applies successfully a scheme of “integrated pest management” for cotton crops on a regional level which is in line with EU legislation and it is massively accepted by the producers.

Campaign 2023/2024

As regards campaign 2023/2024 the cultivated area is nearly 229,414 hectares which is about 9% lower to last season and the lowest in the last 15 years. The number of farmers was 39.409 of which 20.657 Male and 18.572 Female.

Sowing of cotton crops started from early to mid-April 2023 and was completed by mid-May 2023 depending on the region, with relatively favorable weather conditions. In only a few cases, such as in the Region of Thessaly and in Central and Western Macedonia (Kilkis, Imathia, Pella, Pieria and Thessaloniki), the rainfall caused problems during germination which led to re-sowing in some areas.

The weather conditions during summer months favored good vegetative growth of the plants, but led to low yields in non-irrigated crops. The harvest started from mid-September 2023 and was completed with generally good weather conditions, until the beginning of November 2023, with the exception of the Thessaly areas affected by the bad weather conditions DANIEL. The destruction of cotton cultivated areas was more than 80% in the area of Trikala, 70-80% in the area of Karditsa and 75% in the area of Larissa.

The extremely bad weather conditions (Medicane DANIEL and later ELIAS) during harvesting season (September 2023) led to flood, production losses and degradation of cotton quality in the regions of Thessaly, which represents a big part of cotton cultivated area (about 1/3). Fields filled with mud which led to difficult conditions for plowing and sowing for the next year (2024).

Prices for pre-sales during this period range from 62.5 cents per kilo plus the quality premium. It was at lower levels compared to the price given by the gins before the Elias rains which was at 64 cents per kilo.

Medicane DANIEL and later ELIAS and also, dry conditions and high temperature on July and August led to a significant drop to yields and the production of seed cotton was about 626,267 metric tn (32% less than the previous year) from which some 208,645 metric tn of lint cotton were produced.

There were not any serious problems concerning cotton bollworm (*Helicoverpa armigera*) or other crop enemies. As above mentioned, our country applies successfully a scheme of “integrated pest management” for cotton crops on a regional level which is massively accepted by the producers.

Generally, the quality of cotton during campaign 2023/2024 was good enough, except regions of Thessaly for the above mentioned reasons.

As regards farmers’ income the average price of seed cotton was 0.60€ per kilo, which was lower than the previous year.

Campaign 2024/2025

As regards campaign 2024/2025 the cultivated area is estimated at the same level as the previous campaign (area controls are not completed yet).

There were not any serious problems concerning cotton bollworm (*Helicoverpa armigera*) or other crop enemies.

Adverse weather conditions constitute unfavorable conditions for the germination of cotton and resulting in repeating the sowing for two and in many cases, three times. As a result there is a delayed first growth of young cotton plants and late production.

Additionally in Central Macedonia there were problems with irrigation as a result of irrigation water deficit, but all the producers completed the irrigation process even under difficult conditions, with an early crop production. In cotton crops, which were not replanted, as it shows so far, the picking will start earlier compared to other years. Harvesting is expected to begin in the following days and then ginning mills will begin the production of lint cotton. Regarding the price of cotton for the current period, the goal of Interprofessional Cotton Organization (ICO) is to maintain the quality so as cotton to obtain the position it deserves in the international market. For this reason ICO has already started the implementation of a promotion program whose ultimate goal is to highlight the good quality of Greek cotton.

For further information, statistical data from the 14 most recent cotton seasons is presented in the table below.

Year	Area (,000 ha)	Production (seedcotton) (,000 tn)	Price (seedcotton) (€/kg)	Consumption (,000 tn)	Production (lint cotton) (,000 tn)	Yield (seedcotton) (Kg/ha)	Producers
2010	257.0	557	0.60	35	182	2170	
2011	285.7	796.5	0.50	25	227	2790	
2012	279.5	776.5	0.42	21	250	2780	
2013	248.7	852	0.50€	20	296	3430	
2014	271.2	814.3	0.40-0.42		273	3000	
2015	262.9	658.6	0.42-0.44		219	2510	
2016	234.3	680.5	0.51		232	2910	
2017	255.6	756.0	0.49		255	3040	43,309
2018	273.0	858.1	0.49		293	3140	
2019	291.5	1044.2	0.44		360	3580	48,298
2020	276.5	914.8	0.42		315	3310	45,627
2021	261.2	869.2	0.66		295	3330	43,773
2022	253.9	915.3	0.76		322	3600	42,966
2023	229.4	626.3	0.60		209	2730	39,346

EU POLICY

Greece's CAP strategic plan, under the framework for the new EU CAP and according to Reg. (EE) 2021/2115) which applies for the period 2023-2027, includes an intervention which aims to strengthen the sustainability and competitiveness of cotton cultivation and is implemented through the granting of specific support per hectare of eligible cotton area. The amount of the cotton aid is 733.98 €/hectare for base area of 250,000 hectares and total budget 184 million €. If the reference area is exceeded, the aid shall be reduced proportionately. It should be noted that for the last 5 years up to 2023 the base area (>250,000 ha) has been exceeded which results in a proportional reduction of the coupled aid. For the Campaign 2023/2024 cotton aid was 733.98 €/hectare.

EU COTTON

Our country is a one of the founding members of **EUROPEAN COTTON ALLIANCE (ECA)**. **EUROPEAN COTTON ALLIANCE (ECA)** is a European level association formed by the active collaboration of cotton producers' and industry's associations in the European producing countries. 80 to 85% of Europe's cotton is produced in Greece and 15 - 20% in Spain, representing 2% of the world cotton total production, from which only 20-25% is consumed in Europe while the remaining is exported.

FOUNDING MEMBERS: Inter-professional Organizations, Industry and Manufacturer's Associations in Greece and Spain, accumulating 100% of the cotton sector in Europe

ASSOCIATE MEMBER: EUROCOTON, the European federation of cotton and allied textile industries in Brussels

Its aims and objectives are:

- To contribute to the harmonization of EU policies in relation to the sustainable and environmental-friendly practices and traceability of cotton production
- To establish and strengthen the collaboration among cotton producers and the textile industries
- To promote the use of cotton in general and of EUCOTTON, especially among professionals and consumers
- To encourage research and educational activities in the field of cotton
- To promote joint research, development and innovation projects aimed at improving competitiveness and sustainability of the sector and propose new cotton policies

The EUCOTTON is registered as “European Collective Mark” that incorporates the identity features of cotton ethically produced in Europe as it concerns its high quality and the responsible and sustainable way it is produced. Due to these characteristics, European cotton offers new opportunities to big clothing brands.

The Regulation of Use of the EUCOTTON mark requires that:

- Cotton has been produced from non GMO seeds
- Cotton production has been carried out in EU member states, in accordance with the environmental and sustainability standards of EU Common Agricultural Policy (CAP), the cross-compliance and greening standards, with obligations regarding use of water and pesticides, protection of soil, biodiversity, good agricultural condition of land, public health and protection of farmers and consumers
- Cotton ginning and processing has been done by firms registered in EU, operating under European Laws and in compliance with labor and environmental rules applied in the EU

Key messages of EU COTTON are

- European Union produces high quality cotton, widely renowned for its premium characteristics
- European cotton production is sustainable, traceable and of high quality
- Consumers who choose European cotton end-products help European producers and local products.

- Consumers who choose European cotton positively contribute to environmental protection
- Clearer information on labeling of the textile products and a Digital Product Passport
- Mandatory Extended Producer Responsibility for their products along the value chain.