

COUNTRY'S COTTON AND TEXTILE PROFILE: RUSSIAN FEDERATION

Cotton Production in Russia

Cotton is considered in Russia as a main natural spinning fiber for the textile industry and accounts for about 40% of all textile raw materials. The Russian cotton industry has been restored to life since 2015. The development of cotton cultivation is carried out in accordance with the State Program of Agricultural Development and Regulation of Agricultural Products, Raw Materials and Food Markets”.

Despite the climate constraints, agricultural producers in the southern regions have incentives to cultivate cotton with the perspective of further expansion of their activities. Cotton cultivation in Russia is concentrated in regions with a temperate continental climate (Stavropol, Astrakhan and Volgograd regions). Gross harvest in 2019 was 226 tons with yields 26.1 centner/ha, in 2020 – 34.7 tons with yields 17.8 centner/ha. Cotton cultivation area added up to 68 ha (in 2019 87 ha). 66% of crops fell on the Stavropol Territory (45 ha in 2020, 33 ha in 2019). 12 ha were sown by cotton in the Volgograd Region. (21 ha in 2019), 11 ha - in the Astrakhan Region (13 ha in 2019).

Large-scale cotton growing program is being developed in the Stavropol Territory. The agricultural enterprise Tersky implements a project for land irrigation, cultivation and processing of cotton. The company is also planning to build another plant for the primary cotton processing.

The development of cotton industry in the Volgograd Region is based on the research of the Volgograd State Agrarian University.

Volgograd Region

Agrotechnologies and breeding of new fast-growing varieties of cotton (complete ripening and opening of the boll in less than 6 months with sowing in the third decade of April and harvesting in the third decade of October), as well as the use of irrigation systems in cultivation, allow to significantly expand a cotton planting area in southern part of Russia.

Modern industrial cotton production development became possible by virtue of breeding a new ultra-quickly ripening variety of PGSSKh-1, adapted to the natural conditions of the South of Russia. This variety is distinguished by high quality fiber, suitable for processing in the textile industry.

The Volgograd State Agrarian University has been successfully engaged in the production of this particular raw cotton variety since 2015. The University scientists have developed agricultural methods for growing ultra-quickly ripening cotton variety, which are suitable for climatic conditions of the light chestnut soil zone of the Volgograd Region. The raw cotton yield in field experiments averaged 2.2 tons/ha.

The developed evidence-based technology makes it possible to produce planned yields of medium-fiber type raw cotton with fiber of high quality in the Volgograd Region.

The country domestic cotton demand is estimated to be 240-250 thousand tons per year and forecasted to keep growing.

Textile Industry in Russia

The textile industry is regulated in Russia by the Strategy for the Development of the Manufacturing Sector up to 2024 and until 2035. The key objective of the consumer goods industry development is to ensure the sustainability and resilience of the industry while integrating into global economy.

Among the priority areas for the development of consumer goods industry are:

- 1) Finished goods production development;
- 2) National clothing and footwear brands development;
- 3) Integrated natural fibers production chain development (including cotton).

The core textile industry production facilities are located in the Ivanovo Region. The textile goods are also being produced in the Vladimir Region, the Republic of Chuvashia, the Moscow Region and several other regions and territories.

Ivanovo Region

The economic potential of the Ivanovo region is based on textiles and clothing production enterprises performance. Their share in the structure of manufacturing industries is 42%. The enterprises of the region produce 86% of cotton fabrics in the country (from January to September 2021, 12.2 thousand tons of cotton yarn and 548.9 million m² of cotton fabrics were produced). Textiles account for 21% of the region's exports. Main contractors are Belarus, Kazakhstan, the Netherlands, Germany and Poland.

Sustainable Fashion

Sustainable fashion trend, including upcycling, recycling, ethical fashion, slow fashion, and zero waste, is gaining popularity in Russia.

A number of the Russian brands are beginning to align their activities with this concept: they purchase materials from ethical farms, develop partnerships with responsible foreign brands, arrange collection of unwanted items from previous seasons collections.

There are tendencies for popularization of «slow fashion» as well. In this area the Russian companies focus on cooperation with philanthropic foundations and on active marketing efforts to raise awareness of advantages of sustainable production and consumption.

Production of certain cotton goods in Russia, 2017-2020

Goods	2017	2018	2019	2020
Cotton yarn (except sewing threads), tons	51268	49765	42381	43551
Cotton sewing threads, thousand notional coils	156375	137674	126183	112135
Garnetted stock and other cotton waste, tons	26,2	3,9	73,1	723
Cotton fabrics, thousand m²	735752	828294	821001	878914
Household cotton gauze, thousand m²	8774	236	-	-
Blankets quilted puffins with a top of cotton fabrics for children, thousand pieces	1,3	0,9	0,8	0,7
Cotton wadding, tons	256	194	124	129

Statistics of imports of cotton fiber, not carded, to Russia (HS code 5201), 2018 – 2020

	2018		2019		2020	
	Quantity, tons	Value, thousand USD	Quantity, tons	Value, thousand USD	Quantity, tons	Value, thousand USD
5201 cotton fiber, not carded	30 344.2	54 301.4	21 560.1	33 354.3	19 627.4	35 922.9
CIS countries	29 559.9	52 770.9	21 286.1	32 839.9	19 564.1	35 800.3
AZERBAIJAN	901.8	1 547.2	605.7	1 022.6		
BELARUS	40.0	60.3				
KAZAKHSTAN	3 722.0	6 439.5	5 827.0	8 429.9	4 545.3	7 525.9
KYRGYZSTAN	8 380.1	14 535.6	7 472.9	11 582.1	4 895.3	8 549.7
TAJIKISTAN	13 590.3	24 815.2	6 826.6	10 786.4	9 315.8	18 612.9
TURKMENISTAN	1 100.7	2 103.5	160.0	312.9		
UZBEKISTAN	1 824.8	3 269.7	393.9	706.0	807.6	1 111.8
Non-CIS countries	784.3	1 530.6	274.1	514.5	63.4	122.6
AFGANISTAN	122.7	228.6				
GERMANY	14.4	31.4				
INDIA	17.6	33.9				
TURKEY	629.6	1 236.6	274.1	514.5	63.4	122.6

Statistics of exports of cotton fiber, not carded, from Russia (HS code 5201), 2018 – 2020

	2018			2019			2020		
	Quantity, tons	Value, thousand USD	Price, USD/t	Quantity, tons	Value, thousand USD	Price, USD/t	Quantity, tons	Value, thousand USD	Price, USD/t
5201 cotton fiber, not carded	244.47	482.54	1 973.82	323.82	581.46	1 795.63	1 079.66	1 495.72	1 385.36
CIS countries	244.47	482.54	1 973.82	323.82	581.46	1 795.63	602.76	962.39	1 596.64
ARMENIA							4.96	10.53	2 122.98
BELARUS	244.38	481.91	1 971.97	323.82	581.38	1 795.38	557.61	862.42	1 546.64
KAZAKHSTAN	0.09	0.63	7 000.00		0.08				
UKRAINE							40.19	89.44	2 225.43
Non-CIS countries							476.9	533.33	1 118.33
LATVIA							476.06	531	1 115.41

TURKEY

0.84

2.33

2 773.81

Statistics of imports of cotton and cotton textiles to Ivanovo region, January-September 2019-2021

EAEU FEACN codes	Commodity item	The data below is for a period of 9 months						
		2019 thousand USD	2020 thousand USD	Share in imports (2020)	Growth rate of 2020 to 2019	2021 thousand USD	Share in imports (2021)	Growth rate of 2021 to 2020
	Total. including	388 445.0	399 597.4	100.0%	102.9%	559 406.6	100.0%	140.0%
50-67	Textiles, textile articles and footwear	230 800.1	223 679.2	56.0%	96.9%	316 605.5	56.6%	141.5%
52	COTTON	157 819.6	147 615.3	36.9%	93.5%	216 467.1	38.7%	146.6%
5201. 5203	- Cotton fibers	8 103.1	4 869.6	1.2%	60.1%	8 644.3	1.5%	177.5%
5204	- Cotton sewing thread	11.4	12.6	0.0%	110.7%	34.8	0.0%	276.6%
5205- 5207	- Cotton yarn	119 370.6	108 510.4	27.2%	90.9%	163 766.1	29.3%	150.9%
5208- 5212	- Woven fabrics of cotton	29 439.2	33 316.6	8.3%	113.2%	43 740.7	7.8%	131.3%

Statistics on the exports of cotton and cotton textiles from the Ivanovo region, January-September 2019-2021

EAEU FEACN codes	Commodity item	The data below is for a period of 9 months						
		2019 thousand USD	2020 thousand USD	Share in exports (2020)	Growth rate of 2020 to 2019	2021 thousand USD	Share in exports (2021)	Growth rate of 2021 to 2020
	Total. including	133 208.9	124 979.5	31.3%	93.8%	199 299.7	35.6%	159.5%
50-67	Textiles, textile articles and footwear	45 730.8	40 438.1	10.1%	88.4%	42 110.6	7.5%	104.1%
52	COTTON	19 389.8	18 011.5	4.5%	92.9%	19 474.4	3.5%	108.1%
5201. 5203	- Cotton fibers	0.0	0.0	-	-	0.0	-	-
5204	- Cotton sewing thread	0.0	0.0	-	-	0.0	-	-
5205- 5207	- Cotton yarn	715.9	753.3	0.2%	105.2%	1 903.9	0.3%	252.7%
5208- 5212	- Woven fabrics of cotton	18 621.5	17 231.3	4.3%	92.5%	17 569.8	3.1%	102.0%

