

**78TH PLENARY MEETING
OF THE
INTERNATIONAL COTTON
ADVISORY COMMITTEE**

**COUNTRY STATEMENT
THE UNITED STATES OF AMERICA**

**Brisbane
Australia**

1 - 5 December 2019

Table of Contents

UPLAND COTTON SITUATION AND OUTLOOK FOR MY 2019/20	3
UPLAND 2018 CROP	5
Prices	5
Qualities	6
Varieties Planted	8
ELS COTTON SITUATION AND OUTLOOK	11
ELS (AMERICAN PIMA) 2018 CROP	12
Qualities	12
Varieties Planted	13
ORGANIC COTTON MARKET SUMMARY	14
COTTON MARKET DEVELOPMENT	16
Domestic Market Development	16
International Market Development	17
COTTON: SUPPLY AND DISAPPEARANCE, ALL KINDS, 1989-2019	18
List of USDA and other relevant web sites	24

2019/20 UPLAND COTTON SITUATION AND OUTLOOK

(Based on the October 2019 WASDE-USDA Estimate)

Area and Production

U.S. upland cotton production for the 2019 crop (August 2019 - July 2020 marketing year) is forecast at 20.98 million 480-pound bales (4.6 MMT), up 19 percent from 2018/19, and above the 5-year average of 16.5 million bales (3.6 MMT).

Planted area in 2019/20 totaled 5.48 million hectares, down two percent from the previous year. Harvested area is forecast at 4.97 million hectares, suggesting an abandonment rate of 9 percent, down from over 25 percent in 2018/19. Yield per harvested hectare is forecast at 919 kilograms, slightly below the 5-year average of 939 kg/hectare.

Less abandonment and more favorable weather conditions in Texas prompted harvested area up more than a third from the previous year. Upland production was up in all major producing states except Kansas and New Mexico.

Domestic Mill Use

In 2019/20, mill use of upland cotton is projected at 3.0 million bales (648 thousand metric tons), up slightly from the previous year.

Foreign Trade

For 2019/20, upland cotton exports are projected at 15.8 million bales (3.45 MMT), a 12 percent increase from the previous year. The U.S. share of world exports of all cotton is expected to increase to over 38 percent.

Exports for 2018/19 were 14.1 million bales (3.07 MMT), down slightly from 2017/18. For a fourth consecutive year, the top export destination was Vietnam, which accounted for roughly a quarter of shipments. The top ten upland markets (in descending order) were Vietnam, Turkey, China, Pakistan, India, Indonesia, Bangladesh, Mexico, Thailand, South Korea. The top ten destinations represented nearly 90 percent of U.S. upland cotton exports.

U.S. upland cotton imports in 2018/19 were less than 1,000 bales.

Supply and Stocks

The 4.64 million bale (1.01 million metric tons) beginning stocks in 2019/20 are up 13 percent from the previous year. Ending stocks for 2019/20 are forecast at 6.76 million bales (1.47 million metric tons), up 46 percent from 2018/19 and the highest in 12 years.

Inter-fiber Competition

Total U.S. domestic cotton consumption increased in calendar 2018 to its highest level since 2010. U.S. cotton mill use reached 1.5 billion pounds in 2018, slightly below 2017. U.S. cotton textile and apparel product imports and exports moved in opposite directions in 2018. U.S. textile and apparel imports reached 9.0 billion pounds, 4 percent above a year earlier and the highest in eight years. Meanwhile, cotton textile and apparel exports decreased 3.5 percent in 2018 to 1.6 billion pounds, the lowest in nine years. As a result, total U.S. domestic consumption of cotton in 2018 reached 8.8 billion pounds, 4 percent above a year earlier and the highest since 2010's 9.9 billion pounds.

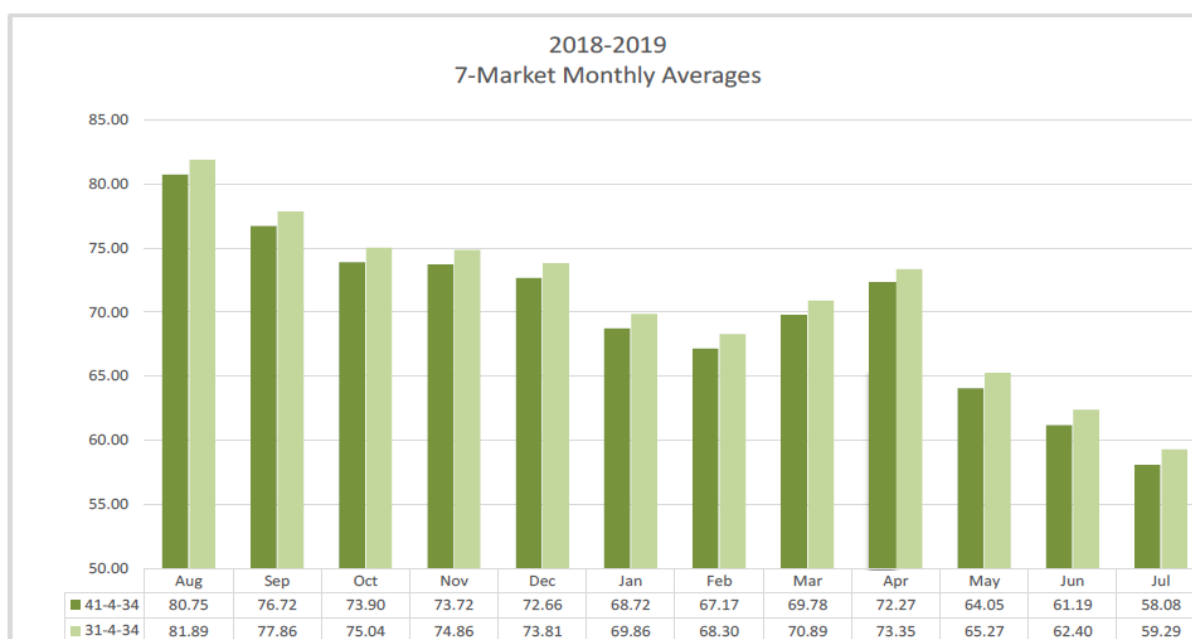
Textile and apparel imports of synthetic fiber products increased 7 percent from 2017 to a record 10.4 billion pounds in 2018. Synthetic products accounted for 50 percent of the total U.S. textile and apparel product imports in 2018, with cotton contributing an additional 43 percent. Meanwhile, synthetic product exports reached 1.6 billion pounds in 2018, marginally above 2017. Synthetic products accounted for 47 percent of the total U.S. textile and apparel product exports in 2018, similar to cotton's share.

Overall, cotton accounts for less than one-third of total U.S. fiber consumption, continuing the downward trend of the past decade. Likewise, cotton fiber spun in the U.S. textile industry follows a similar downward trend. Meanwhile, U.S. per capita consumption of cotton totaled an estimated 27 pounds per person in calendar 2018, slightly above the previous two years. However, less than 5 pounds of this total was spun in the United States, roughly half the level spun in 2005.

UPLAND 2018 CROP

2018 Prices:

Spot cotton quotations for color 41, leaf 4, staple 34, mike 35-36 and 43-49, strength readings of 27.0-28.9 grams per tex, uniformity of 81 units in the designated spot markets averaged 69.92 cents per pound for the 2018-2019 season, down from 75.70 cents for the 2017-2018 season. The season's highest daily quotation for the base quality occurred on August 2, 2018 at 85.65 cents per pound and the season's lowest quotation was 55.28 cents on July 18, 2019. The highest monthly average for the marketing year was 80.75 cents per pound in August 2018 and the lowest was 58.08 cents per pound in July 2019.



Source: USDA, AMS, Cotton and Tobacco Program

Quotations for color 31, leaf 3, staple 34, mike 35-36 and 43-49, strength readings of 27.0-28.9 grams per tex, uniformity of 81 units in the designated spot markets averaged 71.07 cents per pound for the 2018-2019 season, down from 76.65 cents for the 2017-2018 season.

The average price received by farmers for Upland cotton in 2018-19 was 70.30 cents per pound in the 2018-2019 marketing year. The 2017-2018 marketing year average price was 68.60 cents, compared with 68.00 cents in the 2016-2017 marketing year, according to the National Agricultural Statistics Service, USDA. The marketing year average price is monthly prices weighted by monthly marketings during the period August through the following July, with no allowances for unredeemed loans.

Spot cotton transactions for Upland and Pima in the designated markets totaled 1,283,283 running bales in the 2018-2019 marketing year, down from 2,060,426 bales in the 2017-2018 marketing year and 1,570,646 bales in 2016-2017.

Table 1. Season average prices, upland cotton, for the base quality, by designated markets, cents per pound, 2013-2018 1/ 2/

Market Areas	2013	2014	2015	2016	2017	2018
Southeast	82.74	63.55	63.31	72.91	78.91	72.55
North Delta	81.85	62.64	62.43	71.81	77.60	71.52
South Delta	81.85	62.64	62.43	71.81	77.60	71.52
East Texas-Oklahoma	79.27	60.75	59.29	70.25	74.43	68.67
West Texas	79.13	60.71	59.15	70.06	73.85	68.59
Desert Southwest	78.23	61.57	59.72	68.50	73.35	68.04
San Joaquin Valley	78.88	62.32	60.87	69.61	74.13	68.54
Average	80.28	62.03	61.03	70.71	75.70	69.92

1/ Year beginning August 1. 2/ In mixed lots, net weight, compressed, FOB car/truck.

Qualities 2018 Crop:

Color

The predominant color grade of Upland cotton classed from the 2018 crop was color grade 41, accounting for 38.0 percent of classings, according to the USDA, Agricultural Marketing Service, Cotton and Tobacco Program. Color grades 11&21 accounted for 7.9 percent of classings; color grade 31, 29.4 percent; color grades 51,61 and 71, 5.5 percent. In the white color grades, color 41 and better made up percent of 75.3 classings, down from 88.3 percent in 2017. All white color grades accounted for 80.8 percent of the 2018 crop, down from 89.4 percent in 2017. Light Spotted color grades comprised 16.1 percent of classings, up from 8.4 percent in 2017. Spotted, Tinged, Yellow Stained and Below Grades accounted for about 2.8 percent of classings this season, up from 2.3 percent in 2017.

Leaf

The predominant leaf grade of Upland cotton classed from the 2018 crop was leaf grade 3, accounting for 41.0 percent of Upland classings. Leaf grade 3 was also the predominant leaf grade a year earlier, making up 41.7 percent of classings. Leaf

grade 4 comprised the next highest percentage from the 2018 crop at 34.0 percent against 21.1 percent a year ago. Leaf grades 1 and 2 made up 12.3 percent of classings of the 2018 crop, compared with 30.5 percent in 2017. Leaf grade 5 made up 10.6 percent of classings, up from 5.8 percent in 2017. Leaf grades 6,7 and 8 made up 2.3 percent of classings, up from 0.9 percent last year.

Staple

The average staple length of Upland cotton classed from the 2018 crop was 36.54 thirty-seconds of an inch, up from 36.40 a year ago. The predominant staple length was 37, accounting for 28.9 percent of classings. Staples 32 and shorter comprised 0.6 percent of classings. Please see table below.

Staple:	28 & Shorter	29	30	31	32	33	34	35	36	37	38	39	40 & Longer
Percent:	*	*	*	0.1	0.5	1.9	6.6	15.1	22.1	28.9	16.0	7.0	2.0

* is less than 0.05 percent

Mike

The average Mike of Upland cotton classed from the 2018 crop was 4.4, up from 4.1 last year. Please see table below.

MIKE	3.4 & Below	3.5 to 3.9	4.0 to 4.5	4.6 to 5.0	5.1 & Higher
Percent	5.7	11.8	41.5	36	5.9

Strength

The average fiber strength of Upland cotton classed from the 2018 crop was 29.90 grams per tex (gpt), down from 30.3 a year ago. Please see table below.

Strength	22 & Below	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40 & Above
Percent	0.1	0.1	0.4	1.2	3.5	8.5	16.8	22.6	19.9	13.5	7.7	3.5	1.4	0.5	0.3	0.2	0.1	*	*

* is less than 0.05 percent

Cotton Ginnings

Ginnings of 2018-crop cotton in the United States totaled 17.9 million running bales, according to the Cotton Ginnings 2018 Summary report released on May 10, 2019 by the Agricultural Statistics Board, National Agricultural Statistics Service, USDA. This number is down 12 percent from the 2017 season. There were 532 active cotton gins during the 2018 season, down from the 553 gins that operated in 2017. Sixty percent of the gins processed more than 20,000 running bales compared with 69 percent the previous season.

Varieties Planted 2018 Crop:

The Deltapine brand of Upland cottonseed was the most popular planted in the United States for the 2019-2020 season, according to the USDA, Agricultural Marketing Service's Cotton and Tobacco Program. The Americot brand was the second most popular followed by Phytogen, BASF-FiberMax, ALL-TEX/DYNA-GRO, BASF-Stoneville, CROPLAN, and Miscellaneous.

Deltapine brand varieties were the most popular planted in 2019, accounting for 41.0 percent of the United States acreage. This brand accounted for 53.6 percent of the acreage planted in the southeastern states (Alabama, Florida, Georgia, North Carolina, South Carolina, and Virginia). It accounted for about 78.0 percent in the south central states (Arkansas, Louisiana, Mississippi, Missouri, and Tennessee), 25.4 percent in the southwestern states (Texas, Oklahoma, and Kansas), and 38.7 percent in the western states (Arizona, California, and New Mexico). Deltapine's most popular varieties were DP 1646 B2XF, DP 1518 B2XF, DP 1845 B3XF, and DP 1820 B3XF, accounting respectively for 22.3, 3.7, 3.4, and 1.9 percent of the U.S. Upland cotton acreage.

Americot brand varieties were the second most popular planted in 2019, accounting for 22.8 percent of the United States acreage. These varieties accounted for 14.2 percent of the acreage planted in the southeastern states, 6.7 percent in the south central states, 31.4 percent in the southwestern states, and 0 percent in the western states. The most popular Americot varieties were NG 4545 B2XF , NG 4777 B2XF, NG 3406 B2XF, and NG 5711 B3XF, accounting respectively for about 3.6, 3.3, 2.6, and 1.8 percent of the United States acreage planted to Upland cotton.

Phytogen brand varieties were the third most popular planted in 2019, accounting

for 17.8 percent of the United States acreage. They accounted for 19.2 percent of the acreage planted in the southeastern states, 5.9 percent of the acreage in the south central states, 20.6 percent in the southwestern states and 24.2 percent in the western states. The most popular Phytogen brand varieties were PHY 350 W3FE, PHY 480 W3FE, PHY 444 WRF, and PHY 330 W3FE, accounting respectively for 2.6, 2.0, 1.8, and 1.5 percent of the United States acreage planted to Upland cotton.

BASF-FiberMax brand varieties were the fourth most popular planted in 2019. These varieties accounted for about 6.6 percent of the acreage planted. They accounted for 0 percent of the acreage planted in the southeastern states, 0 percent of the acreage in the south central states, 10.3 percent in the southwestern states and 27.6 percent in the western states. The most popular BASF-FiberMax varieties were FM 1830 GLT, FM 2007 GLT, FM 1911 GLT, and FM 1953 GLTP, accounting respectively for 1.4, 1.0, 0.8, and 0.7 percent of the United States acreage planted to Upland cotton.

ALL-TEX/DYNA-GRO brand varieties were the fifth most popular and accounted for about 5.5 percent of the U.S. acreage planted in 2019. BASF-Stoneville varieties were the sixth most popular and accounted for about 3.8 percent of the 2019 cotton acreage. CROPLAN varieties were the seventh most popular and accounted for about 2.2 percent of the 2019 cotton acreage.

Phytogen was the most popular brand of American Pima varieties planted in 2019. Phytogen variety PHY 881 R accounted for 76.4 percent of the United States Pima acreage. Hazera's HA 1432 was the second most planted American Pima variety and accounted for 6.8 percent of the U.S. crop. Phytogen's PHY 841 R was the next most popular variety and accounted for 6.0 percent of the U.S. Pima acreage.

Estimates of the percentage of the various varieties of cotton planted in the United States for 2019 were based on informal surveys made by the Cotton and Tobacco Program Classing Offices. Those surveyed included ginner, seed dealers, extension agents, and other knowledgeable sources.

Estimated percentage of Upland cotton planted to leading specified varieties, by growth area, 2019 Crop

Variety	US	Southeast	South Central	Southwest	Far West
DP 1646 B2XF Deltapine	22.25%	35.58%	46.04%	10.33%	18.44%
DP 1518 B2XF Deltapine	3.69%	0.70%	17.73%	0.71%	-
NG 4545 B2XF Americot	3.63%	-	-	6.18%	-
DP 1845 B3XF Deltapine	3.41%	-	1.97%	5.21%	0.16%
NG 4777 B2XF Americot	3.30%	-	-	5.62%	-
PHY 350 W3FE Phytogen	2.59%	1.93%	0.95%	3.17%	7.53%
NG 3406 B2XF Americot	2.59%	0.01%	1.28%	4.01%	-
DG 3385 B2XF ALL-TEX/DYNA-GRO	2.57%	0.09%	1.93%	3.50%	8.15%
PHY 480 W3FE Phytogen	2.04%	2.13%	0.15%	2.57%	2.09%
DP 1820 B3XF Deltapine	1.89%	0.07%	1.03%	2.88%	-
NG 5711 B3XF Americot	1.84%	4.92%	0.40%	1.18%	-
NG 3500 XF Americot	1.82%	-	-	3.09%	-
PHY 444 WRF Phytogen	1.79%	3.28%	0.21%	1.73%	1.24%
DP 1725 B2XF Deltapine	1.67%	1.40%	6.61%	0.22%	4.05%
NG 5007 B2XF Americot	1.62%	6.45%	0.31%	0.29%	-
DP 1522 B2XF Deltapine	1.60%	1.52%	0.90%	1.77%	3.95%
NG 4689 B2XF Americot	1.60%	0.06%	-	2.69%	-
PHY 330 W3FE Phytogen	1.48%	2.20%	1.35%	1.29%	-
DP 1549 B2XF Deltapine	1.48%	0.42%	-	2.00%	11.25%
FM 1830 GLT BASF-FiberMax	1.38%	-	-	1.82%	16.82%

ELS COTTON SITUATION AND OUTLOOK

(Based on the October 2019 WASDE-USDA Estimate)

Acreage and Production

The U.S. ELS cotton production in 2019/20 is forecast at 724,000 bales (158,000 MT), down 10 percent from the 2018/19 crop, and above the five-year average of 133,500 MT. U.S. plantings of ELS cotton are estimated at 93,000 hectares in 2019/20, down 8 percent from last year. The national ELS cotton yield is forecast at 1,706 kilograms per harvested hectare, down 1 percent from the previous crop. Harvested area is forecast at 92,000 hectares, indicating an abandonment rate of 1 percent. California remains the dominant ELS producing state.

Domestic Mill Use

Mill use of ELS cotton in 2019/20 is estimated at 25,000 bales (5,000 MT), up slightly from the previous year.

Foreign Trade

U.S. Pima exports for 2018/19 reached 671,000 bales (146,000 MT), up 6 percent from the previous season. China remained the largest U.S. Pima market. The other top ten export destinations include India, Vietnam, Pakistan, Peru, Turkey, Thailand, Egypt, Austria, and Bangladesh. The top 10 markets accounted for over 90 percent of total ELS exports. Projected ELS exports for 2019/20 are 675,000 bales (147,000 MT).

Projected ELS imports for 2019/20 are less than 1,000 bales. 1,000 bales of ELS were recorded in 2018/19.

Supply and Stocks

The ELS cotton supply for 2019/20 is forecast at 938,000 bales (204,000 MT), 13 percent above the previous year. Ending stocks for 2018/19 are estimated at 214,000 bales (46,500 MT) more than twice those in 2017/18. Ending Stocks for 2019/20 are forecast at 238,000 bales (51,800 MT).

Quality 2018 Crop:

Percentage distribution of mike, strength and uniformity for American Pima cotton classed, by states and United States, 2018 Crop

	Arizona		California		New Mexico		Texas		United States	
MIKE Ranges										
2.4 & Below	-0	-0	310	*0	-0	-0	-0	-0	310	*0
2.5-2.6	-0	-0	4710	0.10	-0	-0	-0	-0	4710	0.10
2.7-2.9	40	*0	2,9660	0.40	-0	-0	80	*0	2,9810	0.40
3.0-3.20	140	*0	7,9740	1.10	-0	-0	1840	0.60	8,2040	1.10
3.3-3.40	620	0.20	15,0900	2.10	-0	-0	2070	0.70	15,6620	2.00
3.5-3.60	4750	1.70	36,9540	5.20	-0	-0	6840	2.20	39,1620	5.00
3.7-4.20	22,1300	78.00	360,7480	50.90	-0	-0	19,7220	63.10	412,0470	52.70
4.3-4.90	5,6740	20.00	284,8600	40.20	-0	-0	10,4720	33.50	302,5390	38.70
5.0-5.20	-0	-0	1110	*0	-0	-0	-0	-0	1110	*0
5.3 & Above	-0	-0	140	*0	-0	-0	-0	-0	140	*0
Average		4.050		4.220		4.120		4.230		4.220
MIKE										
2.4 & Below	-0	-0	310	*0	-0	-0	-0	-0	310	*0
2.50	-0	-0	1880	*0	-0	-0	-0	-0	1880	*0
2.60	-0	-0	2830	*0	-0	-0	-0	-0	2830	*0
2.70	40	*0	6120	0.10	-0	-0	60	*0	6220	0.10
2.80	-0	-0	9920	0.10	-0	-0	10	*0	9950	0.10
2.90	-0	-0	1,3620	0.20	-0	-0	10	*0	1,3640	0.20
3.00	20	*0	1,8230	0.30	-0	-0	70	*0	1,8340	0.20
3.10	40	*0	2,6410	0.40	-0	-0	310	0.10	2,6770	0.30
3.20	80	*0	3,5100	0.50	-0	-0	1460	0.50	3,6930	0.50
3.30	150	0.10	5,5020	0.80	-0	-0	1590	0.50	5,7360	0.70
3.40	470	0.20	9,5880	1.40	-0	-0	480	0.20	9,9260	1.30
3.50	770	0.30	14,7580	2.10	-0	-0	1970	0.60	15,5010	2.00
3.60	3980	1.40	22,1960	3.10	-0	-0	4870	1.60	23,6610	3.00
3.70	1,0180	3.60	30,2010	4.30	-0	-0	1,1420	3.70	33,6140	4.30
3.80	2,3270	8.20	42,0360	5.90	-0	-0	1,9590	6.30	47,8960	6.10
3.90	4,8140	17.00	55,4680	7.80	-0	-0	3,3400	10.70	65,6870	8.40
4.00	5,5130	19.40	69,1360	9.70	-0	-0	4,7050	15.00	81,1570	10.40
4.10	4,9410	17.40	75,3190	10.60	-0	-0	4,9620	15.90	86,5250	11.10
4.20	3,5170	12.40	88,5880	12.50	-0	-0	3,6140	11.60	97,1680	12.40
4.30	2,9050	10.20	97,1640	13.70	-0	-0	2,7840	8.90	103,7140	13.30
4.40	1,8200	6.40	86,9000	12.30	-0	-0	3,1400	10.00	92,2640	11.80
4.50	8030	2.80	57,8580	8.20	-0	-0	2,5420	8.10	61,4500	7.90
4.60	1210	0.40	29,3600	4.10	-0	-0	1,3730	4.40	30,8730	4.00
4.70	210	0.10	10,4390	1.50	-0	-0	5230	1.70	10,9840	1.40
4.80	20	*0	2,6900	0.40	-0	-0	1070	0.30	2,8000	0.40
4.90	20	*0	4490	0.10	-0	-0	30	*0	4540	0.10
5.00	-0	-0	920	*0	-0	-0	-0	-0	920	*0
5.10	-0	-0	140	*0	-0	-0	-0	-0	140	*0
5.20	-0	-0	50	*0	-0	-0	-0	-0	50	*0
5.3 & Above	-0	-0	260	*0	-0	-0	-0	-0	260	*0
Average		4.050		4.220		4.120		4.230		4.220
Strength										
36 & Below	110	*0	2,6650	0.40	-0	-0	1430	0.50	2,8200	0.40
370	220	0.10	7,6320	1.10	-0	-0	1490	0.50	7,8160	1.00
380	1730	0.60	21,2430	3.00	-0	-0	2620	0.80	21,7160	2.80
390	1,0450	3.70	31,5760	4.50	-0	-0	2140	0.70	33,1390	4.20
400	1,5360	5.40	30,6700	4.30	-0	-0	5950	1.90	33,3820	4.30
410	1,4430	5.10	32,5350	4.60	-0	-0	2,4230	7.70	37,7470	4.80
420	3,5830	12.60	64,6520	9.10	-0	-0	5,2650	16.80	75,8520	9.70
430	8,1150	28.60	116,1990	16.40	-0	-0	5,9900	19.20	133,0060	17.00
440	7,4900	26.40	159,1620	22.40	-0	-0	5,6450	18.00	175,2470	22.40
450	3,7700	13.30	135,5640	19.10	-0	-0	5,0240	16.10	145,9020	18.70
460	9540	3.40	68,5520	9.70	-0	-0	3,4970	11.20	73,4510	9.40
470	1540	0.50	26,1160	3.70	-0	-0	1,6620	5.30	27,9920	3.60
48 & Above	630	0.20	12,6650	1.80	-0	-0	4080	1.30	13,1640	1.70
Average		43.350		43.360		44.050		43.430		43.430
Uniformity										
83 & Below	600	0.20	8,5200	1.20	-0	-0	1300	0.40	8,7280	1.10
840	4850	1.70	53,1980	7.50	-0	-0	5490	1.80	54,3000	7.00
850	7,3590	25.90	181,9320	25.70	-0	-0	3,6220	11.60	195,0170	25.00
860	16,0280	56.50	348,2310	49.10	-0	-0	21,4090	68.40	393,6940	50.40
870	4,3770	15.40	106,5820	15.00	-0	-0	5,5180	17.60	118,6150	15.20
88 & Above	500	0.20	10,7680	1.50	-0	-0	490	0.20	10,8800	1.40
Average		86.250		86.250		86.470		86.220		86.220
SAMPLES CLASSED	28,350		709,2310		-0	-0	31,2770		781,2340	

Varieties Planted 2018:

Estimated percentage of American Pima cotton acreage planted to specified varieties, by states, crop of 2019

		AZ	CA	NM\1	TX\1	US
Phytogen	PHY 881 R	47.17%	81.84%			76.42%
Hazera	HA 1432	-	7.76%			6.82%
Phytogen	PHY 841 R	20.75%	4.11%			5.97%
Phytogen	PHY 888 R	-	4.98%			4.38%
Deltapine	DP 341 RF	32.08%	0.25%			3.06%
Deltapine	DP 348 RF	-	1.06%			1.89%
Deltapine	DP 358 RF	-	-			1.43%
ALL- TEX/DYN A- GRO	ATX P-203	-	-			0.05%

/1 Individual state data withheld

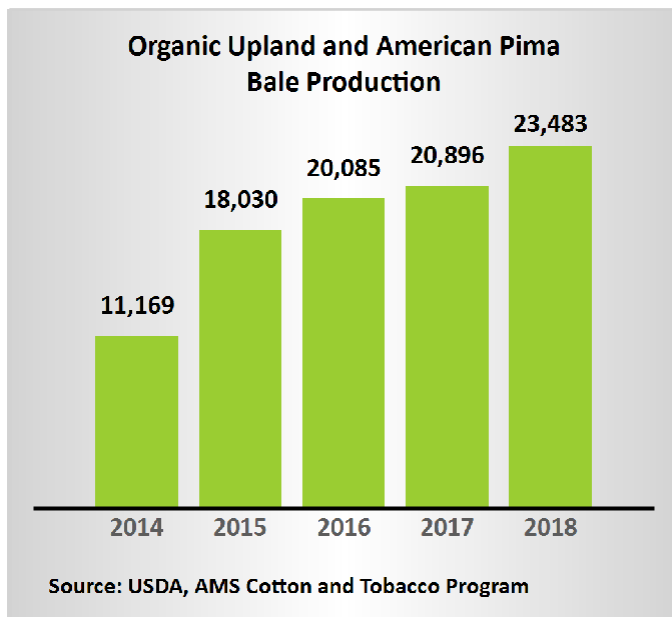
ORGANIC COTTON MARKET SUMMARY

2018 Production

The 2018 organic Upland and American Pima cotton production in the US totaled 23,483 bales according to information collected from organic producers, marketing associations, and gins that process organic cotton. Production increased by 2,587 bales from the previous year. An additional 329 transitional bales were reported. Production was concentrated in West Texas with additional acreage in New Mexico. Bayer CropScience FM 958 and AFD 2485 were the predominate varieties.

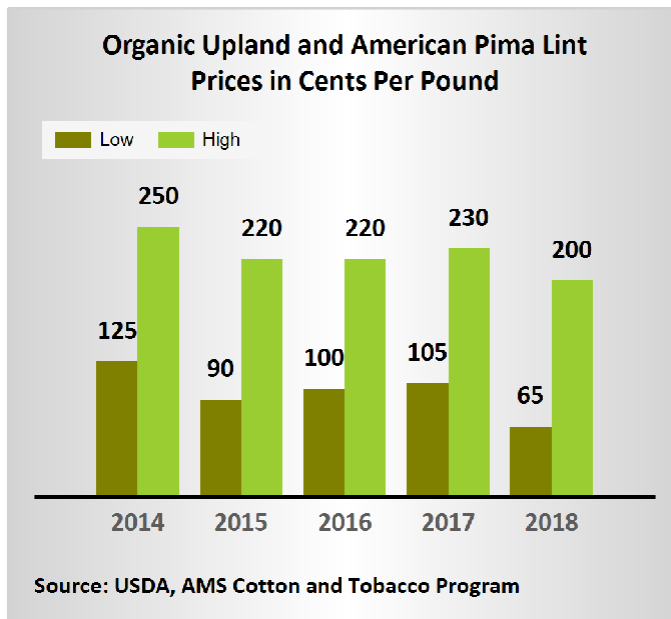
Cottonseed

Organic cottonseed prices ranged from 400 to 525 dollars per ton. This compares to 155 to 225 dollars per ton for conventional cotton. Cottonseed yields ranged from 500 to 800 pounds of seed per bale of ginned lint. Most of the cottonseed was sold to organic dairies. Some was saved for replanting and organic fertilizer. Other uses include products for human consumption.



2019 Crop Outlook

Rain in the spring delayed planting, and a significant amount of acres were replanted. Subsoil moisture was adequate and benefited the crop. Weed flushes and insect populations were prevalent from the wet spring conditions. Hot, dry conditions persisted in the summer that built heat units, which allowed the crop to catch up and mature. Although an August rain would be beneficial, dryland stands were able to grow root systems tapping into the subsoil moisture. The irrigated crop made good progress. Limited availability of non-genetically modified planting seed for organic Upland and American Pima continued to be a concern. A light volume was planted in California. Demand was good but limited.



COTTON MARKET DEVELOPMENT:

Domestic Market Development

Under provisions of the Cotton Research and Promotion Act of 1966, a Cotton Research and Promotion Program was started in the United States in 1967. The primary objective is to carry out an effective and continuous program of research and promotion in order to strengthen the competitive position of cotton by expanding domestic and foreign markets for cotton, improving fiber quality, and lowering costs of production.

From 1967 to 1990, the program was financed through refundable assessments paid by producers. Amendments to the Act, contained in the 1990 Farm Bill, expanded the funding base for the program by authorizing assessments on imported cotton and cotton-containing products while eliminating refunds of producer paid assessments. These changes became effective in 1992. Assessments are levied on each bale or bale equivalent of cotton at a rate of \$1 per bale with a supplemental assessment not to exceed one percent of the value of lint of each bale.

The Act provides for the establishment of a Cotton Board to assist the Secretary of Agriculture by administering the Cotton Research and Promotion Program. The Board collects funds from cotton producers and importers to promote and research the use of cotton and its products. The Board reviews all proposed projects and budgets and recommends programs for approval by the Secretary of Agriculture. The Cotton Board consists of 38 cotton producer and importer representatives appointed by the Secretary of Agriculture from nominations submitted by certified cotton producer and importer organizations. Cotton Board members represent each major cotton-producing state in the United States and cotton importers.

Research, promotion and technical assistance activities are carried out by a contracting organization, Cotton Incorporated. Research activities funded under the Cotton Research and Promotion Program effectively develop innovative processes and treatments for cotton to provide consumers with the latest in fiber technology.

International Market Development

Cotton Incorporated:

Cotton Incorporated's overseas operations began in 1973, with the purpose of expanding markets for cotton by providing technical and marketing assistance abroad. Cotton Incorporated maintains headquarters in United States with offices in China, Japan, Hong Kong, and Mexico. Experts from Cotton Incorporated work closely with mills and their customers to develop and deliver the best cotton products possible. They also help importers establish productive supply chains and sourcing relationships worldwide. Overseas activities include technical servicing to mills to enhance cotton processing technologies, introduction of new fabric and technological advances, and the presentation of color and fabric trend forecasting.

Cotton Council International:

Cotton Council International (CCI) is the export promotion arm of the National Cotton Council of America. CCI's mission is to increase exports of U.S. cotton, cottonseed and U.S. manufactured cotton products through activities that affect every phase of the marketing chain -- from the initial mill buyer of cotton fiber or purchaser of U.S. cotton-rich yarns and fabrics on through to the final consumer. These activities are partly funded by the Foreign Agricultural Service of the U.S. Department of Agriculture.

From its offices in the United States, the United Kingdom, Korea, China and Hong Kong, along with in-country representatives throughout Asia, Latin America and Europe, CCI executes a strategic mix of programs designed to stimulate trade and consumer demand for U.S. cotton. CCI promotes quality products containing 51 percent or more U.S. cotton under the COTTON USA program, reaching about 3 billion current and potential customers of U.S. cotton in more than 50 countries worldwide. Examples of CCI activities include: orientation tours to the United States for foreign cotton spinners and manufacturers' representatives; trade missions to cotton-consuming countries for producers, exporters and government representatives; marketing support via advertising campaigns and retail sales promotions; and buying delegations for COTTON USA partners to targeted sourcing countries.

COTTON: SUPPLY AND DISAPPEARANCE, ALL KINDS, 1989-2019

Marketing Year Beginning	Beginning Stocks 1/	Production 2/	Imports	Total Supply 3/	Mill Use 4/	Exports	Total Demand	Loss 5/	Ending Stocks
1,000 480-POUND NET WEIGHT BALES ALL KINDS									
1989	7,092	12,196	2	19,290	8,759	7,694	16,453	-163	3,000
1990	3,000	15,505	4	18,509	8,657	7,793	16,450	-285	2,344
1991	2,344	17,614	13	19,971	9,613	6,646	16,259	8	3,704
1992	3,704	16,218	1	19,923	10,250	5,201	15,451	-190	4,662
1993	4,662	16,134	6	20,802	10,418	6,862	17,280	-8	3,530
1994	3,530	19,662	20	23,212	11,198	9,402	20,600	-38	2,650
1995	2,650	17,900	408	20,958	10,647	7,675	18,322	27	2,609
1996	2,609	18,942	403	21,954	11,126	6,865	17,991	-8	3,971
1997	3,971	18,793	13	22,777	11,349	7,500	18,849	41	3,887
1998	3,887	13,918	439	18,244	10,401	4,298	14,699	-394	3,939
1999	3,939	16,968	97	21,004	10,194	6,750	16,944	145	3,915
2000	3,915	17,188	16	21,119	8,862	6,740	15,602	-483	6,000
2001	6,000	20,303	21	26,324	7,696	11,000	18,696	180	7,448
2002	7,448	17,209	67	24,724	7,273	11,900	19,173	166	5,385
2003	5,385	18,255	45	23,685	6,266	13,758	20,024	211	3,450
2004	3,450	23,251	29	26,730	6,691	14,436	21,127	108	5,495
2005	5,495	23,890	28	29,413	5,871	17,673	23,544	-200	6,069
2006	6,069	21,588	19	27,676	4,935	12,959	17,894	303	9,479
2007	9,479	19,207	12	28,698	4,584	13,634	18,218	429	10,051
2008	10,051	12,825	0	22,876	3,541	13,261	16,802	-263	6,337
2009	6,337	12,183	0	18,520	3,550	12,037	15,587	-14	2,947
2010	2,947	18,102	9	21,058	3,900	14,376	18,276	182	2,600
2011	2,600	15,573	19	18,192	3,300	11,714	15,014	-172	3,350
2012	3,350	17,314	10	20,674	3,500	13,026	16,526	348	3,800
2013	3,800	12,909	13	16,722	3,550	10,530	14,080	292	2,350
2014	2,350	16,319	12	18,681	3,575	11,246	14,821	210	3,650
2015	3,650	12,888	33	16,571	3,450	9,153	12,603	168	3,800
2016	3,800	17,170	7	20,977	3,250	14,917	18,167	60	2,750
2017	2,750	20,923	3	23,676	3,225	16,279	19,504	-28	4,200
2018 6/	4,200	18,367	3	22,570	2,975	14,763	17,738	-18	4,850
2019 7/	4,850	21,705	5	26,560	3,000	16,500	19,500	60	7,000

COTTON: SUPPLY AND DISAPPEARANCE, UPLAND, 1989-2019

Marketing Year Beginning	Beginning Stocks 1/	Production 2/	Imports	Total Supply 3/	Mill Use 4/	Exports	Total Demand	Loss 5/	Ending Stocks
1,000 480-POUND NET WEIGHT BALES UPLAND									
1989	7,026	11,504	2	18,532	8,686	7,242	15,928	-194	2,793
1990	2,798	15,147	4	17,949	8,592	7,378	15,970	-283	2,262
1991	2,262	17,216	13	19,491	9,548	6,348	15,896	12	3,583
1992	3,583	15,710	1	19,294	10,190	4,869	15,059	-221	4,456
1993	4,456	15,764	6	20,226	10,346	6,555	16,901	22	3,303
1994	3,303	19,324	18	22,645	11,109	8,978	20,087	-30	2,588
1995	2,588	17,532	400	20,520	10,538	7,375	17,913	64	2,543
1996	2,543	18,413	403	21,359	11,020	6,399	17,419	20	3,920
1997	3,920	18,245	13	22,178	11,234	7,060	18,294	62	3,822
1998	3,822	13,476	427	17,725	10,254	4,010	14,264	-375	3,836
1999	3,836	16,294	53	20,183	10,055	6,303	16,358	160	3,665
2000	3,665	16,799	8	20,472	8,738	6,303	15,041	-448	5,879
2001	5,879	19,603	6	25,488	7,592	10,603	18,195	173	7,120
2002	7,120	16,531	10	23,660	7,170	11,266	18,436	85	5,140
2003	5,140	17,823	4	22,967	6,204	13,239	19,443	140	3,384
2004	3,384	22,505	8	25,897	6,629	13,683	20,312	103	5,482
2005	5,482	23,260	9	28,751	5,820	17,115	22,935	-175	5,991
2006	5,991	20,823	10	26,824	4,896	12,324	17,220	313	9,291
2007	9,291	18,355	6	27,652	4,548	12,801	17,349	408	9,895
2008	9,895	12,395	0	22,289	3,512	13,029	16,541	-284	6,032
2009	6,032	11,783	0	17,815	3,529	11,343	14,872	14	2,929
2010	2,929	17,598	2	20,529	3,874	13,881	17,755	202	2,572
2011	2,572	14,722	13	17,307	3,278	11,120	14,398	-172	3,081
2012	3,081	16,534	6	19,621	3,478	12,182	15,660	348	3,613
2013	3,613	12,275	6	15,894	3,527	9,850	13,377	292	2,225
2014	2,225	15,753	9	17,987	3,550	10,836	14,386	210	3,391
2015	3,391	12,455	30	15,876	3,425	8,619	12,044	168	3,664
2016	3,664	16,601	5	20,270	3,221	14,303	17,524	60	2,686
2017	2,686	20,223	1	22,910	3,198	15,643	18,841	-28	4,097
2018 6/	4,097	17,566	0	21,663	2,953	14,092	17,045	-18	4,636
2019 7/	4,636	20,981	5	25,622	2,975	15,825	18,800	60	6,762

COTTON: SUPPLY AND DISAPPEARANCE, ELS, 1989-2019

Marketing Year Beginning	Beginning Stocks 1/	Production 2/	Imports	Total Supply 3/	Mill Use 4/	Exports	Total Demand	Loss 5/	Ending Stocks
1,000 480-POUND NET WEIGHT BALES EXTRA-LONG STAPLE									
1989	66	692	0	758	73	452	525	31	202
1990	202	358	0	560	65	415	480	-2	82
1991	82	398	0	480	65	298	363	-4	121
1992	121	508	0	629	60	332	392	31	206
1993	206	370	0	576	72	307	379	-30	227
1994	227	338	2	567	89	424	513	-8	62
1995	62	368	8	438	109	300	409	-37	66
1996	66	529	0	595	106	466	572	-28	51
1997	51	548	0	599	115	440	555	-21	65
1998	65	442	12	519	147	288	435	-19	103
1999	103	674	44	821	139	447	586	-15	250
2000	250	389	8	647	124	437	561	-35	121
2001	121	700	15	836	104	397	501	7	328
2002	328	678	57	1,063	103	634	737	81	245
2003	245	432	41	718	62	519	581	71	66
2004	66	746	21	833	62	753	815	5	13
2005	13	630	19	662	51	558	609	-25	78
2006	78	765	9	852	39	635	674	-10	188
2007	188	852	6	1,046	36	833	869	21	156
2008	156	431	0	587	29	232	261	21	305
2009	305	400	0	705	21	694	715	-28	18
2010	18	504	7	529	26	495	521	-20	28
2011	28	851	6	885	22	594	616	0	269
2012	269	780	4	1,053	22	844	866	0	187
2013	187	634	7	828	23	680	703	0	125
2014	125	566	3	694	25	410	435	0	259
2015	259	433	3	695	25	534	559	0	136
2016	136	569	2	707	29	614	643	0	64
2017	64	700	2	766	27	636	663	0	103
2018 6/	103	801	3	907	22	671	693	0	214
2019 7/	214	724	0	938	25	675	700	0	238

1/ Compiled from Bureau of the Census data and adjusted to an August 1 480-pound net weight basis. Excludes preseason ginnings. Beginning in 2012, stocks are estimated by USDA.

2/ Includes preseason ginnings.

3/ Totals made from unrounded data.

4/ Adjusted to August 1-July 31 marketing year.

5/ Difference between ending stocks based on Census data and preceding season's supply less disappearance. For upland cotton, this difference primarily reflects an increase of an estimated one percent in average bale weights due to moisture absorption once cotton is ginned and begins to flow through marketing channels.

6/ Estimate.

7/ Forecast.

U.S. PER CAPITA DOMESTIC COTTON CONSUMPTION, 1984-2018

Calendar Year	Mill Use	Textile Imports	Textile Exports	Net Trade 2/	Domestic Consumption 3/
Pounds					
1984	11.50	4.84	0.87	5.31	16.81
1985	11.80	6.75	0.87	5.88	17.20
1986	13.54	7.94	1.14	6.80	20.34
1987	15.46	9.62	1.23	8.39	23.85
1988	14.32	8.66	1.33	7.33	21.65
1989	16.36	9.49	1.95	7.53	23.89
1990	16.45	9.63	2.51	7.12	23.58
1991	17.15	10.17	2.61	7.56	24.71
1992	18.53	12.30	3.05	9.25	27.79
1993	18.97	13.67	3.47	10.20	29.17
1994	19.86	14.46	4.06	10.40	30.26
1995	19.44	15.17	4.89	10.27	29.71
1996	19.38	15.46	5.54	9.92	29.30
1997	19.94	18.36	6.43	11.93	31.87
1998	18.96	21.30	6.87	14.43	33.39
1999	17.77	23.51	7.19	16.32	34.08
2000	16.81	25.86	8.28	17.57	34.38
2001	13.49	25.33	7.10	18.22	31.71
2002	12.82	28.23	7.24	20.98	33.80
2003	11.10	30.05	7.55	22.49	33.59
2004	10.67	30.71	7.59	23.12	33.79
2005	10.25	33.58	7.47	26.12	36.37
2006	8.76	34.70	7.15	27.55	36.31
2007	7.67	34.39	6.27	28.12	35.79
2008	6.78	32.25	6.05	26.20	32.98
2009	5.14	28.69	4.87	23.82	28.96
2010	5.91	31.84	5.74	26.10	32.00
2011	5.49	27.45	5.89	21.56	27.05
2012	5.13	26.07	5.22	20.85	25.98
2013	5.42	26.75	5.51	21.25	26.67
2014	5.31	26.34	5.52	20.82	26.14
2015	5.33	27.48	5.76	21.72	27.05
2016	4.99	26.47	5.32	21.16	26.15
2017	4.78	26.52	5.22	21.30	26.08
2018	4.57	27.45	5.00	22.45	27.02

1/ U.S. apparent consumption of cotton and cotton textiles.

2/ Imports minus exports.

3/ Mill use plus net trade.

Compiled by Economic Research Service, USDA, from Bureau of the Census data.

**RAW COTTON EQUIVALENT OF U.S. EXPORTS OF DOMESTIC
COTTON MANUFACTURES AND IMPORTS FOR CONSUMPTION OF
COTTON MANUFACTURES, 1985-2018**

Calendar Year	Total Exports		Total Imports	
	1,000 Pounds	1,000 Bales 1/	1,000 Pounds	1,000 Bales 1/
1985	213,224	444.2	1,629,166	3,394.1
1986	274,828	572.6	1,910,474	3,980.2
1987	298,004	620.8	2,335,696	4,866.0
1988	330,266	688.1	2,118,775	4,414.1
1989	483,300	1,006.9	2,346,522	4,888.6
1990	626,983	1,306.2	2,408,443	5,017.6
1991	662,125	1,379.4	2,578,635	5,372.2
1992	782,418	1,630.0	3,159,493	6,582.3
1993	902,855	1,880.9	3,557,606	7,411.7
1994	1,069,552	2,228.2	3,809,936	7,937.4
1995	1,304,605	2,717.9	4,043,131	8,423.2
1996	1,493,821	3,112.1	4,170,429	8,688.4
1997	1,755,116	3,656.5	5,010,236	10,438.0
1998	1,897,240	3,952.6	5,881,961	12,254.1
1999	2,007,878	4,183.1	6,565,381	13,677.9
2000	2,339,224	4,873.4	7,301,542	15,211.5
2001	2,026,591	4,222.1	7,225,996	15,054.2
2002	2,086,470	4,346.8	8,131,767	16,941.2
2003	2,196,912	4,576.9	8,737,960	18,204.1
2004	2,226,258	4,638.0	9,012,203	18,775.4
2005	2,211,545	4,607.4	9,947,656	20,724.3
2006	2,136,877	4,451.8	10,373,973	21,612.4
2007	1,893,478	3,944.7	10,385,844	21,637.2
2008	1,843,719	3,841.1	9,829,113	20,477.3
2009	1,498,247	3,121.3	8,820,812	18,376.7
2010	1,779,108	3,706.5	9,861,621	20,545.0
2011	1,837,476	3,828.1	8,564,312	17,842.3
2012	1,639,967	3,416.6	8,190,888	17,064.4
2013	1,742,081	3,629.3	8,464,276	17,633.9
2014	1,759,241	3,665.1	8,395,744	17,491.1
2015	1,848,566	3,851.2	8,820,451	18,375.9
2016	1,718,585	3,580.4	8,558,382	17,830.0
2017	1,697,404	3,536.3	8,629,100	17,977.3
2018	1,637,970	3,412.4	8,988,247	18,725.5

1/ Bales of 480-pound net weight.

Compiled by Economic Research Service, USDA, from Bureau of the Census data.

MANMADE FIBERS: U.S. MILL CONSUMPTION, 1984-2016

Calendar Year	Cellulosic	Noncellulosic	Total
	Million pounds		
1984	587.9	7,378.2	7,966.1
1985	545.6	7,679.9	8,225.5
1986	608.3	8,044.4	8,652.7
1987	585.6	8,480.1	9,065.7
1988	612.4	8,595.0	9,207.4
1989	611.3	8,616.8	9,228.1
1990	604.5	8,448.1	9,052.6
1991	564.2	8,535.7	9,099.9
1992	565.4	8,941.2	9,498.9
1993	606.2	9,334.1	9,928.5
1994	544.6	9,982.6	10,527.2
1995	507.8	9,799.3	10,307.1
1996	472.9	10,035.8	10,508.7
1997	448.2	10,622.7	11,070.9
1998	382.5	10,694.3	11,076.8
1999	330.4	11,015.8	11,346.2
2000	301.5	11,074.6	11,376.1
2001	222.3	9,974.6	10,197.0
2002	203.0	10,336.7	10,539.7
2003	176.6	10,012.6	10,189.3
2004	181.7	10,111.2	10,292.9
2005	165.1	10,051.4	10,216.5
2006	174.3	9,266.5	9,440.9
2007	239.2	9,035.3	9,274.5
2008	209.9	7,917.7	8,127.6
2009	189.2	6,627.7	6,816.9
2010	190.8	7,459.8	7,650.6
2011	186.5	7,127.1	7,313.6
2012	181.7	7,620.5	7,802.3
2013	163.4	7,909.6	8,073.0
2014	182.9	8,117.8	8,300.7
2015	198.5	8,445.4	8,643.9
2016	206.4	8,460.3	8,666.7

Note: Fiber Organon no longer published.
 Compiled by Economic Research Service, USDA, from
Fiber Organon and Bureau of the Census data.

List of USDA and other relevant web sites:

USDA Production, Supply, and Demand Estimates: On line access to USDA's historical and forecast data for cotton production, consumption, and trade for 120 countries.

<https://apps.fas.usda.gov/psdonline/app/index.html#/app/home>

Cotton and Wool Outlook (CWS): Economic Research Service, U.S. Department of Agriculture. Description: Monthly. Provides information and statistics on domestic and world cotton and wool production, consumption, export sales, use, and prices, including data on raw fibers and textiles. <https://usda.library.cornell.edu/concern/publications/n870zq801?locale=en>

The USDA Economics, Statistics & Market Information System: Contains nearly 300 reports and datasets from the economics agencies of the U.S. Department of Agriculture. These materials cover U.S. and international agriculture and related topics. Most reports are text files that contain time-sensitive information. Most data sets are in spreadsheet format and include time-series data that are updated yearly. <http://usda.mannlib.cornell.edu/>

The USDA Baseline provides: Long run projections for the U.S. agricultural sector through 2023. Projections cover selected agricultural commodities and agricultural trade, and aggregate indicators such as farm income and food prices. As "baseline" projections, they represent one plausible scenario for the next ten years, and reflect both model results and judgment http://www.ers.usda.gov/topics/farm-economy/agricultural-baseline-projections.aspx#.VBc2a_ldV8E

AMS The Cotton Program: The program promotes the orderly and efficient marketing of cotton by preparing, distributing, and encouraging the use of universal cotton classification standards, and by providing cotton classification and market news that meet the needs and expectations of the cotton and textile industries. <http://www.ams.usda.gov/cotton/index.htm>

USDA AMS Market News Reports - Cotton Reports: AMS provides current, unbiased price and sales information to assist in the orderly marketing and distribution of farm commodities. <http://www.ams.usda.gov/market-news/cotton>

USDA - National Agricultural Statistics Service Reports by Commodity:

<https://www.nass.usda.gov/Publications/index.php>

World Agricultural Outlook Board WASDE REPORT: The World Agricultural Supply and Demand Estimates (WASDE) report is available electronically within one hour of release. <http://www.usda.gov/oce/commodity/wasde/index.htm>

Farm Service Agency (FSA): The Farm Service Agency provides "Program Fact Sheets" in Portable Document Format (PDF) on all commodity programs including cotton. <https://www.fsa.usda.gov/news-room/fact-sheets/index>

Export Credit Guarantee Programs: The Commodity Credit Corporation (CCC), U.S. Department of Agriculture, administers export credit guarantee programs for commercial financing of U.S. agricultural exports. <http://www.fas.usda.gov/excredits/ecgp.asp>

United States Farm Bill: Information on the U.S. Farm Bill.

<https://www.fsa.usda.gov/programs-and-services/farm-bill/index>