

COMMODITIES AT A GLANCE

« Special issue on Cotton in Africa »



UNITED NATIONS

N°2 - July 2011

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Note

INTRODUCTION

This issue of **Commodities at a Glance** has been prepared by the Special Unit on Commodities (SUC) of UNCTAD. This quarterly publication aims to collect, present and disseminate accurate and relevant statistical information linked to international primary commodity markets in a clear, concise and friendly format.

Given the recent record rises in cotton prices and wider commodity price volatility, this edition of **Commodities at a glance** (n°2), will focus on the world cotton industry, with a special emphasis on African cotton producing countries. The cotton sector in Africa is critical to the provision of sustainable rural livelihoods and the economic development of these countries. This issue of **Commodities at a glance** with its focus on the African cotton sector has been prepared for the Pan-African Cotton Meeting in June 2011, in Cotonou (Benin).

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STATISTICAL DATA SOURCES

All Statistical data sources for this publication have been indicated under each specific graph.

Some discrepancies may appear in this document, especially between production and trade statistics due to the way information is reported by countries.

The share of Africa in cotton lint exports both in 1985/86-1989/90 and 2006/07-2010/11 is higher than the share of Africa in cotton lint production. This situation is due to the fact that cotton is mainly grown as an export crop in Africa for international markets, while it is largely processed and domestically used in other regions.

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A photograph of a rural scene. In the foreground, a person wearing a blue shirt and dark pants stands on a dirt path, looking towards a large pile of white cotton bolls. A wooden cart with a single wheel is loaded with a large pile of white cotton bolls. Another person is bent over the cart, working with the cotton. The background features a dirt hill with sparse green trees under a clear blue sky.

MAKING NEWS THIS QUARTER...

Making news this quarter...

This quarter's edition of UNCTAD's *Commodities at a Glance* describes world cotton trade, price, production, and consumption trends, with a particular focus on Africa. The cotton sector is vital for at least 80 countries, of which 28 are in Africa, and accounts for around 2 per cent of the world's arable land. Cotton production and processing is a critically important source of income and employment in developing countries, including the least developed countries (LDCs) in Africa. China, India, the United States and Pakistan are the main producers in the world, followed by Brazil and Uzbekistan, who altogether account for 80 per cent of world cotton production. African cotton lint production accounts for 5 per cent of world production (see figure 7b). Cotton is also a widely traded commodity, involving over 100 countries in both import and exports.

Prior to 2008, the world cotton industry had been experiencing robust demand growth and rising yields. Over the last 60 years, cotton production once almost quadrupled, from 7 million tons in 1950/51 to 27 million tons in 2006/07, but declined thereafter to 22 million in 2009/10 (see figure 6). The introduction and adoption of new technologies and expansion of the area under cotton has resulted in significant production gains in the world. African cotton production peaked in 2004/05 (at around 2 million tons) and then declined by almost 50 per cent over the next five years (see figure 6). The African CFAF zone countries were hardest hit with production declines of 55 per cent between 2004/05 and 2008/09 as compared with a 20 per cent decline in SADC countries.

Since 1985, world cotton yields have risen from around 500 kilograms per hectare to 800 kilograms. However, these productivity gains have not materialized in Africa. The productivity gap between world and African cotton lint yields has grown over the past 20 years, with average cotton yields in Africa at about half the world average. Yields in Africa have declined by 10 per cent during this period (see figures 10 and 11). Growth in Africa's cotton production has not been based on productivity gains with declining yields being a key factor (see figure 10).

In 2009/10 African cotton exports accounted for 12.5 per cent of world cotton lint exports, down from the 21 per cent share achieved in 2003/04. This situation represents a substantial loss of global market share over the past 5 years. Again, in terms of export performance, the CFAF zone countries were hardest hit with their cotton exports falling from 14 per cent of world cotton exports (71 per cent of African cotton exports) to 7 per cent (59 per cent of African cotton exports) during 2003/04 to 2009/10[1]. Finding a solution to the cotton issue might facilitate the conclusion of the WTO Doha Round, and help African cotton producers achieve stable, predictable and fair prices on the world market.

A particular issue for cotton producing African countries concerns “commodity dependence” as many countries have experienced unbalanced growth patterns due in part to the high concentration of merchandise exports in few commodities traded on often volatile world markets. Relying on a few commodities with uncertain profitability enhances their economic vulnerability.

The cotton-led growth of many African countries has been negatively affected by the growing volatility of world prices, competing synthetic fibers, and cotton subsidies in the United States, Europe and China. Nonetheless, there are substantial growth opportunities for African cotton, although some challenges need to be addressed: (i) improving value addition (and quality), (ii) closing the productivity gap

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