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Report Highlights:

Uzbekistan's cotton production in marketing year (MY) 2023/24 is estimated at 621,000 metric tons (MT) (2.85 million bales). Cotton consumption in MY 2023/24 is forecast lower year-to-year at 599,000 MT (2.75 million bales) due to lower demand from importer countries like Turkiye and Russia for cotton yarn and fabric. There has been a decline in exports of both yarn and fabric in 2023, following the trend seen in 2022, due to a global decline in demand for ready-to-wear apparel and garment. As of 2023, the Government of Uzbekistan (GoU) will not enforce a minimum price for raw cotton. Additionally, farmers will be able to choose which cluster they want to sell their raw cotton to within their region, and if there is a surplus of raw cotton it will be traded in an exchange.

I. Production

The total cotton area planted for marketing year (MY) 2023/24 is projected at 950,000 hectares (ha), 3 percent less than the last MY. The primary reason for the reduction in acreage is the government's land redistribution policy, aimed at enhancing the country's food security and increasing household incomes. Lint cotton production in MY 2023/24 is forecast to be lower than the previous year at 621,000 metric tons (MT) (2.85 million bales), as weather conditions were not as favorable as the previous MY. On the other hand, yield-enhancing investments in planting, harvesting, and processing of cotton continues. Market sources indicate that cotton prices have been very low this MY, resulting in cotton that may be left unpicked. Low demand for yarn and fabric led to decreased demand for cotton, and cotton spinning mills have been working as low as 50 percent capacity.

As of fall 2023, the Uzbek Association of Cotton-Textile Clusters (UACC) reports that there are currently 142 cotton clusters that are made up of vertically integrated private companies which produce, gin, and spin cotton. This is eight more clusters than the previous MY. Some of the more fully integrated clusters also produce fabric and ready-to-wear garments. These clusters all have some land on which they grow their own cotton, and supplement theirs with cotton sourced from farmers in the area.

According to new Government of Uzbekistan (GoU) policies, minimum cotton prices are no longer declared by the government, but an advisory minimum price is announced. The advisory price for MY 2023/24 was 8,000 Som/kg (approx. 0.65 USD/kg). According to market sources, many farmers and clusters did not make money from cultivating cotton during the MY 2023/24 harvest, while others saw just 10-12 percent profit. Decreasing profit margins in cotton farming may, in the medium run, result in decreased cotton planting area and less cotton production.

Poor soil quality in cotton-growing areas due to decades of unsustainable growing practices has led many cotton clusters to undertake efforts to improve soil quality on their own, according to market sources. As an example, some are increasing organic material in their fields. In addition, many are using soil washing techniques to reduce soil salinity resulting from climate-related factors and the scarcity of water. These investments to enrich and revitalize the soil are important in maintaining current yields and, if continued, could lead to slight increases in overall yields.

According to the GoU, the UACC, as well as other market sources, mechanical cotton picking is increasing because labor scarcity and cost. However, Post estimates that only a small amount of cotton is currently mechanically harvested. Looking forward, the trend towards increased mechanization is expected to quickly expand, with clusters investing in mechanical pickers to use on their farms and the private farms from which they source their cotton. Uzbek news sources reported in August 2023 that the first local tractor was produced in the agricultural machinery cluster of Uzbekistan. The agricultural machinery cluster of Uzbekistan has an annual capacity of producing 15,000 tractors, trailers, and other equipment.

Cotton growers are facing rising input costs for fertilizer and fuel which is narrowing profit margins. While fertilizer prices have increased, they likely would have climbed even higher had Uzbekistan not produced most of its fertilizer needs. According to the UACC, 85 percent of the country's fertilizer is produced domestically.

New Regulation Aimed at Increasing the Use of Certified Seed

In December 2022, the GoU passed a new regulation requiring cotton and other crop seeds to be certified by the Uzbek government seed testing agency. The purpose behind this regulation is to increase the use of better-quality seeds in order to increase crop yields. The agency charges a fee to test and analyze the seed and issues a certificate of conformity if the seed meets the specified standards.

These certified seeds were used for planting in spring 2023 for MY 2023/24. Market sources are indicating that clusters can now choose which seed they want to use and even import seeds if they like.

Better Cotton Initiative Launches Sustainable Cotton Program

In November of last year, the Better Cotton Initiative conducted a seminar in Tashkent to formally launch its Better Cotton program. The program aims to produce “better cotton” (known as BCI cotton) through a focus on sustainability by using less water, fertilizer, and pesticides, and free of forced labor. BCI-grown cotton is preferred by many western brands that target upper-middle and high-income consumers. According to the Ministry of Agriculture, there were three clusters working toward producing BCI cotton on 35,000 ha of land in 2022. Post predicts that Uzbekistan will increase its production of BCI cotton in the short- to medium-term. Additional information is available at Better Cotton’s [web page](#). Better Cotton signed a “Roadmap of Sustainability Developments” with key stakeholders in Uzbekistan to drive further improvements in the country’s cotton sector in June 2023¹.

In addition to BCI cotton, Uzbekistan is working on producing organic cotton. According to news sources, a cotton cluster in the Bukhara Region harvested organic cotton for the first time on 3,000 ha of land during the MY 2022/23 season. The cotton was certified as organic by the Dutch firm Control Union and was used to produce cotton yarn for export to Japan. As of 2022, there were reportedly 12,000 ha of land that were being transitioned to grow organic cotton in the future. According to GoU and market sources, organic cotton production continues with little increase in MY 2023/24 and few other regions are in the pipeline to be able to produce organic cotton in the near future.

II. Consumption

MY 2023/24 cotton consumption is forecast to decrease year-to-year to 599,000 MT (2.75 million bales) despite increased demand resulting from the ongoing investments in the country’s textile sector. This is a result of low demand for cotton yarn and fabric, the major export of the Uzbek textile industry, and declining demand from countries like Turkiye, Russia, the United States, and the EU in connection with decreasing demand for ready-to-wear apparel in 2023.

Almost all of Uzbekistan’s cotton is used by the country’s yarn factories. With this contraction in demand, Uzbekistan’s textile and garment factories are operating at reduced capacity as of fall 2023, (40 to 60 percent) even with access to sufficient supplies of domestic cotton.

Investments in Uzbekistan’s textile industry continue amid continuing geopolitical challenges, such as the war in Ukraine and the Israel-Hamas conflict, global macroeconomic slow-down, and a downturn in global apparel demand. These investments, especially in the country’s yarn, fabric, and read-to-wear garment industries, suggest that cotton consumption will increase in the future. As these investments

¹ News <https://www.textiletechnology.net/fibers/news/better-cotton-strengthening-uzbekistans-sustainable-cotton-production-34258>

continue, Uzbekistan may start importing cotton in coming years. In fact, some market sources are already reporting that it was becoming increasingly difficult to source local cotton in MY 2021/22 when global demand for clothing was at a higher point at the end of COVID-19 lock-downs in Europe, the U.S., China, Russia and Turkiye. As apparel orders from western buyers did not pick up for any apparel/garment producer country as of fall 2023, Uzbek yarn factories have started to both produce stock for inventory and cut back production until market conditions improve.

Looking ahead, Post predicts that continued investments in Uzbekistan's yarn (and fabric) manufacturing capacity will ultimately increase total cotton demand and force the country to import more cotton lint as the ready-to-wear garment market improves.

III. Trade

Exports

In accordance with the GoU's policy discouraging cotton exports in favor of value-added yarn, fabric and ready-to-wear garment exports, Uzbekistan's cotton exports are forecast to continue trending downward, falling to 3,000 MT (15,000 bales) in MY 2023/24. Another minor reason for the decline of cotton exports during the last two MY's is that cotton demand in importer countries such as Turkiye have declined. This trend will continue in coming years as Uzbekistan uses almost all domestically produced cotton for domestic yarn factories, and as previously discussed spindle investments are increasing. As Uzbekistan does not have customs or commodity statistics available, totals are derived from importing destinations' customs statistics.

While cotton exports are falling, Uzbekistan's exports of cotton yarn and cotton fabric have significantly increased. In the future, Uzbekistan aspires to move higher up along the cotton value chain and become a major producer and exporter of fabric and read-to-wear apparel and garments. In several speeches, the President of Uzbekistan has called for the country to become a garment and apparel exporting country. In the medium to long run Uzbekistan is expected to move in this direction.

There has been a decline in exports of both yarn and fabric in 2022 compared to 2021 due to a global decline in demand for ready-to-wear apparel and garment in 2022, especially in Europe and the US. As the demand for clothing has declined in target markets, the raw material for ready-to-wear apparel and garment such as yarn and fabric have been decreasing in producer countries like Turkiye, hence those countries import much less from Uzbekistan. It looks like a similar trend remained for 2023.

Table 1: Cotton Exports from Uzbekistan (HS Code: 5201), 480lb. Bales and Metric Tons

UZBEKISTAN			
COTTON			
Export Trade Matrix*			
Units:	Metric Tons		
Time Period	Aug/July	Aug/July	Aug/July
Imports for:	MY 2020/21	MY 2021/22	MY 2022/23
Turkey	27,448	5,136	699
EU 27 (excl. UK)	412	617	119
China	6,322	0	0
Kazakhstan	473	385	0
Belarus	93	105	not reporting
Kyrgyzstan	7	0	not reporting
Russia	786	0	not reporting
TOTAL	35,541	6,243	818

UZBEKISTAN			
COTTON			
Export Trade Matrix*			
Units:	Bales		
Time Period	Aug/July	Aug/July	Aug/July
Imports for:	MY 2020/21	MY 2021/22	MY 2022/23
Turkey	126,068	23,589	3,210
EU 27 (excl. UK)	1,892	2,834	547
China	29,037	0	0
Kazakhstan	2,172	1,768	0
Belarus	427	482	not reporting
Kyrgyzstan	32	0	not reporting
Russia	3,610	0	not reporting
TOTAL	163,239	28,674	3,757

Source: Trade Data Monitor

* Uzbekistan does not report trade statistics and is not a WTO member; therefore, the totals will not exactly match the PS&D tables. These numbers are derived from importing destinations. The table is presented to show the largest buyers of Uzbek cotton by approximate size. Additionally, Russia has stopped reporting customs statistics; numbers for Russia are only valid through February 2022.

Table 2: Cotton Yarn Exports from Uzbekistan (HS Code: 5204, 5205, 5207), Metric Tons

UZBEKISTAN			
COTTON YARN			
Export Trade Matrix*			
Units:	Metric Tons, Calendar Year (CY)		
Imports for:	2021	2022	2023 (9 Months)
USA	291	118	0
Turkey	90,183	141,371	89,080
China	188,139	86,829	83,090
Egypt	13,817	795	14,868
EU 27 (excl. UK)	2,817	19,205	12,070
Ukraine	269	2,277	1,531
Morocco	238	609	753
Armenia	1,168	700	426
Kazakhstan	372	522	351
Kyrgyzstan	36	468	336
Japan	311	110	100
Others	251,440	12,547	296
TOTAL	549,081	265,551	202,901

Source: Trade Data Monitor

* Uzbekistan does not report customs or trade statistics and is not a WTO member; therefore, the totals will not account for all export figures. Additionally, Russia has stopped reporting customs statistics; numbers for Russia are only valid through February 2022.

Table 3: Cotton Fabric Exports from Uzbekistan, (HS Code: 5208, 5209), Square Meters
(thousands of square meters (m²))

UZBEKISTAN			
COTTON FABRIC			
Export Trade Matrix*			
Units:	Units: 1,000 m2, Calendar Year		
Imports for:	2021	2022	2023 (9 Months)
USA	0	0	0
Kazakhstan	25,768	25,245	22,298
EU 27 (excl. UK)	52,426	39,617	17,551
Ukraine	12,815	14,689	8,537
South Korea	6,633	4,029	725
Turkey	2,805	2,674	443
North Macedonia	0.676	10	6
Serbia	6	2	0
Japan	435	145	0
UK	1,555	369	0
Russia	188,578	Not Reporting	Not Reporting
Others	2,487	12,989	0
TOTAL**	293,510	99,770	49,560

Source: Trade Data Monitor

* Uzbekistan does not report customs or trade statistics and is not a WTO member; therefore, the totals might not account for all export figures. Additionally, Russia has stopped reporting customs statistics; export numbers for Russia are only valid through February 2022.

**A few countries measure fabric in terms of MT, whereas most countries measure fabric by m². For the first 9 months of 2023, Kyrgyzstan's imports were 442 MT, Azerbaijan's 382 MT, and China's were 45 MT. All are negligible amounts in world trade.

Imports

Imports of cotton in MY 2023/24 are forecast to decline from the previous year at 15,000 MT (70 thousand bales). This projection is based on the global slowdown in yarn demand from fabric and garment producers and assumes that domestic cotton production will be sufficient to meet most of the country's needs. Market sources indicate that yarn production facilities are working under capacity. As demand for ready-to-wear garments eventually increases, Uzbek yarn factories will increase their capacity and in turn demand for imported cotton will increase.

Over the last few years, with the expansion of Uzbekistan's textile industry, the country has started importing cotton from neighboring countries, such as Kazakhstan, Kyrgyzstan, and Tajikistan. Some market sources indicate that even cotton from China is being imported from time to time. Looking into

the future, Post predicts that Uzbekistan will need to import more cotton since the country's cotton production capacity is not enough to keep up with growing demand from the spinning industry.

IV. Policy

New State Support Announced for Cotton Clusters

In January 2023 a presidential decree was adopted introducing “*measures to support the activities of cotton and textile clusters, radical reform of the textile and clothing and knitwear industry, as well as further increasing the export potential of the sector.*” According to the decree, the government will provide loans totaling \$200 million over a three-year period to finance enterprises that export fabrics, knitted fabrics, knitwear, and finished garments. At the same time, up until April 1st of this year, the government undertook efforts to attract \$500 million in funding from foreign financial institutions to finance working capital for textile and ready-to-wear garment producers for a two-year period. The decree also allows these companies to transfer abroad up to \$100,000 per year and abolishes the requirement to pay an advance monthly electricity payment.

Also, as of January 2023 the President of Uzbekistan signed a resolution to guarantee cotton clusters access to preferential loans for fertilizer, seeds, and fuel for growing cotton. The cotton clusters can freely decide which cotton varieties to plant and are able to import high-yielding seed varieties from abroad.

The resolution also stipulates that the government will pay 30 percent of the cost to laser-level cotton fields. This leveling process is supposed to help farmers use water resources more efficiently. Additionally, scientific organizations that specialize in cotton growing and agro-service centers will be assigned to each cluster to help integrate the latest science and production techniques. In parallel with this support, the President of Uzbekistan has urged cotton and textile clusters to expand their use of alternative energy and water-saving technologies, while implementing innovative solutions across cluster activities.

In September 2023 another presidential decree on “*additional measures to financially support the textile industry*” was adopted. To provide working capital for enterprises exporting fabrics, knitted fabrics, and finished garments and knitwear, an Export Support Fund was established and allocated an additional \$50 million. The measure is aimed at the full mobilization of the existing capabilities of textile industry enterprises, further increasing their export potential, and a corresponding change is being made to the January 2023 decree. Post analysis is that this extra support was provided so that in this time of very low demand for yarn, fabric, and garments, clusters will not risk bankruptcy.

Minimum Price of Cotton

In accordance with the presidential resolution entitled on “*measures for the widespread introduction of market principles in the field of cotton growing*”, the Ministries of Agriculture and Economic Development and Poverty Reduction, the Council of Farmers, Dekhkan Farms and Owners of Household Plots of Uzbekistan, and the Uzpakhtasanoat (Cotton Growers Association) were given the joint responsibility to announce the expected minimum price for raw cotton based on an analysis of world market prices.

In January 2023 the President of Uzbekistan signed a decree on “*additional measures to further support the activities of raw cotton producers,*” which consolidated the operation of market mechanisms in this

area. According to the decree, the purchase price of raw cotton is determined by “cotton-textile clusters and farms on the basis of a mutually beneficial agreement.” The advised minimum price is to be taken into consideration but is not enforced. Several cotton clusters indicated that they determine the price based on global cotton prices, the supply-demand situation, and other local factors.

According to news reports, in October 2023 the President of Uzbekistan declared in a meeting that farmers will be allowed to enter into futures contracts with any cluster within their region (note: not mandatory to sell to a specific cluster, as before). They will also be able to sell surplus cotton that they could not sell within their own region through an exchange. At the meeting it was also noted that farmers will be provided with preferential loans in the form of a 60 percent advance payment for growing cotton for next year’s harvest.

According to market sources, in theory it is now possible for a farmer to sell raw cotton to a different cluster than the originally designated cluster with a market determined price, but in practice it is still very hard to sell raw cotton to a cluster that is not originally that farm’s designated cluster and even harder to negotiate a price that cluster would like to purchase from.

International Labor Organization (ILO) and International Finance Corporation (IFC) Starts a Program in Uzbekistan to Improve Working Conditions

ILO and IFC launched a new Better Work Program in Uzbekistan in June 2023 to improve working conditions and drive competitiveness in the country’s key textile and garment industry. IFC, ILO and Uzbekistan tripartite constituents – including government, employers, and workers’ organizations – signed an MOU on May 30, 2023, setting out the conditions for the program, which will initially be operational for 24 months. It will promote labor standards and competitiveness in textile and garment factories through compliance assessments, training, and advisory services.

GoU Provides \$250 million Fund to Postpone Debt of Cotton-textile Clusters

The President of Uzbekistan, Shavkat Mirziyoyev, signed a decree on “*ensuring the continuity of financing of expenditures for state support of agriculture*” in June 2023. According to the decree, repayment of loans allocated by commercial banks to cotton-textile clusters in 2022 will be extended by one year (up to a total of \$250 million). The decree also clarifies the procedure for providing funds to the Export Support Fund under the Export Promotion Agency to provide working capital for enterprises exporting fabrics, knitted fabrics, and finished garments and knitwear. Thus, the fund will be allocated in the following order: in 2023, \$50 million; in 2024, \$150 million, subject to pay back until January 1, 2026. Post analysis is that this government support is designed to ease the financial conditions of the cotton-textile clusters that are facing demand difficulties from export markets due to low demand of apparel in the developed countries.

VAT on Raw Cotton will be Paid in Installments

A government resolution on “*the harmonization of the terms for the payment and accounting of value added tax (VAT) for producers of raw cotton*” was adopted in August 2023. Raw cotton from the 2023 harvest will be accepted by cotton-textile clusters entirely through electronic scales. An automated accounting program will be launched on calculation and payment of the VAT in installments. Post analysis that this extra measure was taken to ease the financial situation of the cotton clusters so that in

this time of very low demand for yarn, fabric, and garments, clusters don't go into a risky financial level or go even bankrupt.

New Criteria are Created for Establishing New Clusters

In a meeting in November 2023 the President of Uzbekistan explained that 122 of the cotton-textile clusters have debts to the Agriculture Fund and farmers. Based on this, a decision was made to introduce a new system for organizing clusters and organizing their interaction with farmers. Newly created clusters will be required to have sufficient financial indicators, production capacity, and equipment. They will be selected based on an open competition.

A Centralized Digital Agricultural Platform is Being Established

In August 2023 a presidential resolution on “*measures to introduce advanced digital technologies in the field of agriculture*” was adopted. According to the resolution, starting September 1st, 2023, the *Agroplatform Information System* will be implemented as part of the Digital Agriculture single integrated platform. This platform envisages the digitalization of the processes of preferential lending for the cultivation of cotton, grain, fruits, and vegetables, as well as the provision of services to agricultural producers based on the principle of transparency.

The aim is that until October 2023 a unified database of agricultural land users is to be created on the Agroplatform Information System. By the end of 2023 a platform is to be introduced to provide services for the analysis of geoinformation technologies and space images; existing crop placement machinery will be improved with digital technology. At the same time, the *CropAgro information system* will be introduced to receive proposals from land users, electronic placement of crops, coordination, automatic generation of information and reports.

Irrigation Investments to Help Conserve Water

An estimated 90 percent of all water resources used in Uzbekistan go to agriculture, including wheat and cotton irrigation, but climate change is affecting the country's water supply. Continued investments in land leveling and new irrigation systems will help conserve water resources and keep cotton yields stable in future. According to the UACC, laser leveling and modern irrigation systems in a field can result in a 50 percent savings in water usage. However, even these investments may not prove enough in the long term given the effects of climate change and decreasing water resources.

Establishment of Industrial Zones and a Technopark for Textiles

Through a January 2023 decree, by the end of 2023, small *specialized industrial zones* for textile business are to be created in the Andijan, Namangan and Kashkadarya regions. An *industrial technopark*, specialized in detailed processing of textile and leather products, is to be established in the Tashkent region.

Redistribution of Land for Horticultural Production

As a part of its national agricultural policy, the GoU has been working to diversify the country's crop production, moving away from cotton and promoting food security and land ownership opportunities for low-income and smallholder farmers. This diversification entails leasing land previously used to grow cotton and grains to produce other crops.

In a November 2021 presidential resolution, entitled “*Measures to develop family entrepreneurship in horticulture and viticulture*,” the GoU announced that 200,000 ha of land that was previously used for cotton and grain production would be leased to farmers from 2022-25 to grow horticultural products. Eligible farmers can lease 0.1-1.0 hectare-sized plots and the government will provide them access to credit to start cultivation. In July of last year, the President declared at a conference on increasing food production and increasing household incomes, that 80,000 ha of land had been leased to farmers growing horticultural products in 2022.

Forced Labor Issues

The most important policy update in 2022 was progress in addressing the longstanding issue of forced labor. On March 1, 2022, the International Labor Organization (ILO) declared that “[Uzbek cotton is free from systemic child labor and forced labor](#).” On March 10, 2022, the *Cotton Campaign*, a coalition of NGOs and businesses, [ended its call for a boycott](#) on Uzbek cotton. The Campaign will now shift its attention to raising cotton workers’ wages. Leading up to this development, the GoU had instituted one of its final measures the year before to stop child and forced labor, called “*On additional measures to finance the harvest of raw cotton*.”

Prior to 2022, many fashion and ready-to-wear-apparel brands had refused to purchase apparel and garments produced from fabrics or yarn made from Uzbek cotton due to the child labor and forced labor issues. In fact, as of 2021 there were [331 brands that pledged](#) not to buy apparel produced from Uzbek cotton, including many U.S. brands.

Uzbekistan’s government and the country’s cotton sector welcomed the ILO’s declaration and the end of the Cotton Campaign’s boycott. This development has the potential to increase the country’s exports of fabric and yarn to a certain extent. However, the capacity to increase exports in the short run is limited since most of the country’s cotton products are already being exported. In the medium to long-run, export potential is greater as new production capacity comes online and demand from Western markets, like the European Union, United Kingdom, and the United States, could grow.

At the same time, Turkish textile and ready-to-wear-apparel companies might increase investments in Uzbekistan in order to manufacture Western brands. In addition, some international brands might decide to open production facilities in Uzbekistan. However, the perceived investment risk in the country is still quite high for many Western companies.

Textile and Garment Exports to EU Benefit from Duty-Free Access

As of April 10, 2021, Uzbekistan was added to the EU’s *Generalized Scheme of Preferences*² (GSP+), which qualifies certain Uzbek exports for duty free access to the EU market on approximately 66 percent of EU tariff lines. This preferential access is a special incentive to support vulnerable developing countries that ratify 27 international conventions on human rights, labor rights, environmental protection, climate change, and good governance. From news reports, this policy has already increased Uzbekistan’s textile and ready-to-wear-garment and apparel exports to the EU by 70 percent in 2021 and an additional 28 percent in 2022.

² The EU’s Generalized Scheme of Preferences (GSP), created following UNCTAD recommendations in 1971, helps developing countries (DC) by making it easier for them to export their products to the European Union. This is done in the form of reduced tariffs for their goods when entering the EU market.

Ministry of Agriculture is Testing New Cotton Varieties

In January 2023 the Ministry of Agriculture (MinAg) announced that the Ministry's Crop Testing Center in Tashkent and its regional stations are testing new cotton varieties to determine their suitability to the soil and climatic conditions in Uzbekistan, resistance to disease and pests, and for yields and quality characteristics. According to MinAg, 85 different cotton varieties were studied and tested in 2022. Particular attention was paid to fiber yield, fiber density, yardage, tensile strength, specific length, microns, and weight of 1000 seeds. Based on the test results, cotton varieties will be included in the State Register for cultivation.

Government Introduces New Tax Requirements

In accordance with a February 2023 presidential decree, producer/trader companies' information systems for receiving and accounting of raw cotton, grains and rice must be integrated with the tax authority's systems.

In a separate decree, a pilot income tax return program was introduced for employees working on farms that specialize in cultivating cotton and grains. Participating farms must employ at least one worker per month for each hectare of land and pay a monthly wage to employees. The pilot program runs from April 1, 2023, to May 1, 2024.

V. Production, Supply and Distribution Tables

Table 5: Production, Supply and Distribution Table, Bales
(thousands of hectares, thousands of 480lb. bales)

Cotton	2021/2022		2022/2023		2023/2024	
Market Begin Year	August 2021		August 2022		August 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1,060	975	1,070	980	1,030	950
Beginning Stocks	1,774	1,323	1,340	1,673	1,740	1,848
Production	2,865	3,100	3,300	3,100	2,900	2,850
Imports	54	600	25	100	100	50
Total Supply	4,693	5,023	4,665	4,873	4,740	4,748
Exports	53	250	25	25	25	15
Use	3,300	3,100	2,900	3,000	3,200	2,750
Total Dom. Cons.	3,300	3,100	2,900	3,000	3,200	2,750
Ending Stocks	1,340	1,673	1,740	1,848	1,515	1,983
Total Distribution	4,693	5,023	4,665	4,873	4,740	4,748
Stock to use %	39.96	49.94	59.49	61.09	46.98	71.72
Yield	588	692	671	689	613	653

Source: USDA forecasts, FAS Istanbul forecasts.

Table 6: Production, Supply and Demand Table, Metric Tons
(thousands of hectares, thousands of MT)

Cotton	2021/2022		2022/2023		2023/2024	
Market Begin Year	August 2021		August 2022		August 2023	
Turkey	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1,060	975	1,070	980	1,030	950
Beginning Stocks	386	288	292	364	379	402
Production	624	675	718	675	631	621
Imports	12	131	5	22	22	11
Total Supply	1,022	1,094	1,016	1,061	1,032	1,034
Exports	12	54	5	5	5	3
Use	718	675	631	653	697	599
Total Dom. Cons.	718	675	631	653	697	599
Ending Stocks	292	364	379	402	330	432
Total Distribution	1,022	1,094	1,016	1,061	1,032	1,034
Stock to use %	39.96	49.94	59.49	61.09	0.00	71.72
Yield	588	692	671	689	613	653

Source: USDA forecasts, FAS Istanbul forecasts.

Attachments:

No Attachments