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Report Highlights:

The regional harvested area for Marketing Year (MY) 2024/25 is forecast to rise 17 percent at 1.38 million hectares (MHA) compared to the previous year based on expectations of good farm gate prices and improved security and stability in many cotton-growing areas. MY 2024/25 production is forecast up 17 percent at 2.52 million bales based on increase access to fertilizer and urea, a good weather conditions, and less pest pressure. Post estimates exports to increase 14 percent at 2.47 million bales based on greater available supply. MY 2023/24 area is estimated to drop four percent due to insecurity in Burkina Faso that prevented farmers from accessing their lands and low availability of inputs. However, MY 2023/24 cotton production is estimated at 2.14 million bales, a 38 percent jump from the previous year based on better pest management to counter jassid infestations. MY 2023/24 exports are estimated at 2.17 million bales, up 43 percent from the previous year.

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Executive Summary:

Improved security conditions in almost all cotton-growing areas of Burkina Faso and some parts of Mali have allowed farmers to access their farms; coupled with good expectations for farm gate prices, the harvested area for Marketing Year (MY) 2024/25 is forecast to rise 17 percent at 1.38 million hectares (MHA) compared to the previous year. MY 2024/25 production is forecast to increase 17 percent at 2.52 million bales based on increase access to fertilizer and urea, a good rainy season, and less pest pressure. Post estimates exports from the region will increase 14 percent at 2.47 million bales based on greater available supply. MY 2023/24 area is estimated to drop four percent, due mainly to insecurity in Burkina Faso that prevented farmers from accessing their lands and unavailability of inputs in certain zones of the country. MY 2023/24 cotton production is estimated at 2.14 million bales, a 38 percent increase compared to the previous year based on a better pest management. New insecticides introduced this year were effective in the fight against jassid infestations. MY 2023/24 exports are estimated at 2.17 million bales increasing 43 percent from the previous year.

MY 2024/25 Mali area and cotton production levels are forecast at 720,000 hectares (HA) and 1.39 million bales, respectively, representing two and five percent growth from last year.

Area and production for 2024/25 in Burkina Faso is expected to increase 40 percent and 39 percent respectively from the previous year on expectation of a better security situation and increase access to inputs.

Senegal MY 2024/25 area harvested is forecast at 18,000 HA, increasing 13 percent from the previous year, while production is predicted to rise 17 percent at 35,000 bales.

MY2023/24 stocks for all three mentioned countries are expected to decrease 19 percent at 314,000 bales compared to the previous year due mainly to improved transportation logistics in Mali (after the end of the Economic Community of West African States (ECOWAS) embargo) and in Burkina Faso (with an improved security situation).

However, in February 2024, Mali and Burkina Faso announced that they would withdraw from the ECOWAS economic block. Since most cotton is shipped from ECOWAS countries 'ports, the decision could slow down logistics and add to stocks when the resulting measures take effect.

Farm gate cotton and fertilizer prices for MY 2024/25 have not been announced yet.

Burkina Faso

Production

According to cotton industry, MY 2024/25 area is estimated to increase 40 percent at 645,000 hectares (HA) compared to the previous year on expectation of good farm gate prices and improved security which will allow more farmers access their land. Cotton industry contacts said that despite terrorism, the Société des fibres textiles du Burkina (SOFITEX) cotton production zone—which accounts for about 80

percent of the national production—is slightly affected. In addition, the Burkinabe population is increasingly resilient and there are many reconquered areas which will resume production in MY 2024/25. Cotton production in MY 2024/25 is estimated to increase 39 percent from the previous year at 1.09 million bales based on favorable weather and good pest management.

MY 2023/24 area is estimated at 462,000 HA dropping 25 percent from the previous year due to the worrying security situation that prevented farmers from accessing their land and input deliveries in certain production zones. In addition, input prices increased 75 percent for NPK (Nitrogen, Phosphorus, Potassium) and 100 percent for Urea compared to the previous year. This entire situation discouraged farmers from plant more hectares. Cotton production in MY 2023/24 is estimated at 785,000 bales, one percent more than the previous year. The rise in yield is partially attributable to the use of the three recommended insecticides to prevent jassids attacks. For more information, see the previous [GAIN report](#).

Consumption and Value-Added Cotton

MY 2024/25 consumption remain estimated at 25,000 bales based on the country’s capacity to process cotton fiber. There is only one industrial cotton processing company named *La Filature du Sahel* (FILSAH) with an annual processing capacity of about 20,000 bales of cotton fiber into yarn. Most of the processed yarn is exported while a small quantity remains in the country and is used by artisans to produce weaving textile.

Photo 1: FILSAH processing company



Source: <https://www.aib.media/regions/2023/09/20/industrie-cotonniere-filsah-le-leader-du-fil-100-coton-en-afrique-de-louest/>

The country aims to increase artisanal process cotton and in February 2024 the transitional Government of Burkina Faso launched the [construction of a National Support Center for Artisanal Cotton Processing \(CNATAC\)](#) in addition to the national school of engineering that trains textile engineers. CNATAC will provide courses in weaving, dyeing, cutting, and sewing.

Also, [the transitional GOBF adopted in June 2023](#) a decree related to the wearing of the Faso Dan Fani and the koko dunda (both locally cotton processed textile). This decree applies to the socio-professional categories, higher education teachers, administrative, judicial, and political authorities, chiefs of administrative districts. Burkina Faso also produces about 300,000 tons of seed cotton which is processed into oil and used as planting seeds.

Photo 2: Locally processed textile: Faso Dan Fani (left) and Koko Dunda (right)



Source: <https://lefaso.net/spip.php?article122351>

Trade

Post forecasts Burkina Faso's cotton exports in 2024/25 at 1.07 million bales, up 37 percent compared to the previous year based on greater available supply and improved security that may facilitate transportation logistics.

MY 2023/24 is estimated at 780,000 bales, representing five percent increase compared to the previous year.

Stocks

Post forecasts 2024/25 stocks to remain the same than the previous year at 91,000 bales.

Policy

Post expects the transitional Government of Burkina Faso will continue to support the cotton sector. In MY 2023/24, the minister of trade announced a total subsidy for the cotton sector of \$19.19 million of which \$16.6 million were granted by the State and \$2.53 million provided by the cotton sector.

Mali

Production

MY 2024/25 area is forecast up two percent at 720,000 HA compared to the previous year on expectation of a good farm gate price and access to inputs. MY2024/25 cotton production is forecast at 1.39 million bales representing a five percent increase compared to the previous year based on a good rainy season and less pest pressure.

MY 2023/24 area and production levels are estimated at 709,000 hectares and 1.33 million bales up 19 and 77 percent, respectively. The use of recommended pesticides to fight jassids has improved pest management and increased yields in MY2023/24 compared to the previous year.

Consumption and Value-Added Cotton

MY 2024/25 consumption is forecast to remain unchanged from the previous year at 25,000 bales. According to the [media](#), in December 2023 the transitional Government of Mali launched the construction of a second ginning factory in Kita region. This \$36.6 million investment was cofinanced by the Malian bank (BDM SA) for \$23.33 million and the remaining by the Compagnie malienne pour le développement du textile (CMDT). The media also reported that the transitional Government of Mali signed an agreement with the People's Republic of China for the installation of two spinning industries in Koutiala and Bamako totaling \$354 million.

Trade

Exports in 2024/25 are forecast at 1.37 million bales, a slight increase from the previous year based on available supply. The MY 2023/24 exports are estimated to increase 81 percent at 1.36 million bales from the previous year due to production increases and improved transportation logistics after Mali's embargo was lifted in July 2022. However, in February 2024, Mali and Burkina Faso announced that they would withdraw from ECOWAS, which could slow down transportation when the measure goes into effect.

Stocks

Stocks for 2024/25 are forecast to decrease two percent at 216,000 bales based on a transportation feasibility. MY2023/24 stocks are estimated to decrease 20 percent at 221,000 bales due to the better trade flow.

Policy

The transitional Government of Mali continues to support the cotton sector by investing in ginning and textile factories to increase supply.

Senegal

Production

Senegal cotton area for MY2024/25 is forecast at 18,000 hectares, increasing 13 percent compared to the previous year on expectation of a good farm gate price and better access to inputs. MY 2024/25 cotton production is forecast to increase 17 percent at 35,000 bales based on a good rainy season and less pest pressure.

MY 2023/24 area and production levels estimated at 16,000 HA and 30,000 bales decreasing 6 percent and increasing 20 percent respectively compared to the previous year. The drought at the beginning of the season discouraged some farmers who decided to stop planting more cotton, which reduced area compared to the previous year. However, better pest management from the use of recommended insecticides to fight jassids provided better yields in MY 2023/24 when compared to MY 2022/23.

Consumption and Value-Added Cotton

Senegal's local consumption continue to be forecast at zero bales for 2024/25 and 2022/23 due to the lack of a cotton processing industry.

Trade

Senegal cotton exports for MY 2024/25 is forecast at 35,000 bales, a 17 percent increase compared to last year based on available supply. MY 2023/24 exports are estimated at 30,000 bales based on available supply.

Stocks

Stocks for 2024/25 remain forecast at 2,000 bales, the same as the previous year.

Policy

The Government of Senegal subsidy cotton prices since many years as well as agricultural equipment.

Table 1. West Africa: Fixed Farm Gate Prices for Grade One Cotton

(CFA francs)	Official 22/23 Farm Gate Price	Official 23/24 Farm Gate Price	Official 24/25 Farm Gate Price
Burkina Faso	300 (\$0.52)	325 (\$0.54)	N/A
Mali	285 (\$0.49)	295 (~\$0.50)	N/A
Senegal	300 (\$0.52)	300 (~\$0.50)	N/A

Source: Official government data from Mali, Senegal, and Burkina Faso; \$1=600 CFA francs per kg

Table 2. West Africa: Pricing for NPK (Nitrogen, Phosphorus, Potassium) and Urea

(CFA francs)	Official 2022/23 Input Prices	Official 2023/24 Input Prices	Official 2024/25 Input Prices
Burkina Faso	NPK: 16,000 (\$27.82) Urea: 16,000 (\$27.82)	NPK: 28,000 (\$46.66) Urea: 32,000 (\$53.33)	N/A
Mali	NPK: 12,500 (\$21.73) Urea: 12,500 (\$21.73)	NPK: 14,840 (\$24.73) Urea: 14,840 (\$24.73)	N/A
Senegal	NPK: 15,012 (\$26.11) Urea: 13,112 (\$22.80)	NPK: 15,012 (\$26.11) Urea: 13,112 (\$22.80)	N/A

Source: Official government data from Mali, Senegal, and Burkina Faso; \$1=600 CFA francs; All prices for 50 kg bag

Table 3. Burkina Faso-Cotton Production, Supply and Distribution Data Statistics (1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton Market Year Begins	2022/2023		2023/2024		2024/2025	
	Aug 2022		Aug 2023		Aug 2024	
Burkina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	618	618	535	462	0	645
Beginning Stocks 1000 480 lb. Bales	96	96	106	111	0	91
Production 1000 480 lb. Bales	775	780	770	785	0	1095
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	871	876	876	896	0	1186
Exports 1000 480 lb. Bales	750	740	775	780	0	1070
Domestic Use 1000 480 lb. Bales	15	25	15	25	0	25
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	15	25	15	25	0	25
Ending Stocks 1000 480 lb. Bales	106	111	86	91	0	91
Total Distribution 1000 480 lb. Bales	871	876	876	896	0	1186
Stock to Use % (PERCENT)	13.86	14.51	10.89	11.3	0	8.31
Yield (KG/HA)	273	275	313	370	0	370

Table 4. Mali- Cotton Production, Supply and Distribution Data Statistics
(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton Market Year Begins Mali	2022/2023		2023/2024		2024/2025	
	Aug 2022		Aug 2023		Aug 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	596	596	710	709	0	720
Beginning Stocks 1000 480 lb. Bales	301	301	261	276	0	221
Production 1000 480 lb. Bales	735	750	1300	1330	0	1390
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	1036	1051	1561	1606	0	1611
Exports 1000 480 lb. Bales	750	750	1150	1360	0	1370
Domestic Use 1000 480 lb. Bales	25	25	25	25	0	25
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	25	25	25	25	0	25
Ending Stocks 1000 480 lb. Bales	261	276	386	221	0	216
Total Distribution 1000 480 lb. Bales	1036	1051	1561	1606	0	1611
Stock to Use % (PERCENT)	33.68	35.61	32.85	15.96	0	15.48
Yield (KG/HA)	269	274	399	408	0	420

Table 5. Senegal-Cotton Production, Supply and Distribution Data Statistics
(1,000 Hectares (HA), 1,000 bales, PERCENT, KG/HA)

Cotton Market Year Begins Senegal	2022/2023		2023/2024		2024/2025	
	Aug 2022		Aug 2023		Aug 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	17	17	16	16	0	18
Beginning Stocks 1000 480 lb. Bales	2	2	10	2	0	2
Production 1000 480 lb. Bales	25	25	30	30	0	35
Imports 1000 480 lb. Bales	0	0	0	0	0	0
Total Supply 1000 480 lb. Bales	27	27	40	32	0	37
Exports 1000 480 lb. Bales	17	25	32	30	0	35
Domestic Use 1000 480 lb. Bales	0	0	0	0	0	0
Loss 1000 480 lb. Bales	0	0	0	0	0	0
Domestic Use and Loss 1000 480 lb. Bales	0	0	0	0	0	0
Ending Stocks 1000 480 lb. Bales	10	2	8	2	0	2
Total Distribution 1000 480 lb. Bales	27	27	40	32	0	37
Stock to Use % (PERCENT)	58.82	8	25	6.67	0	5.71
Yield (KG/HA)	320	320	408	408	0	423

Attachments:

No Attachments