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Statement of the Arab Republic of Egypt

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Introduction

With appreciation and gratitude, The Egyptian delegation of the Arab Republic of Egypt submits this economic report to the ICAC covering statistics concerning Egyptian cotton and policies about production and marketing.

Cotton is a cash crop to Egyptian famers as well as an important resource to the Egyptian economy from the foreign currency.

Cotton production occupies more than half Million rural householders, beside employs more than half a million workers, and indirectly through multiplier effect generates over one million additional Jobs.

In the year 2010 cotton and textile exports generated about 2250 million US dollars, which cotton lint accounted for about US \$ 250 million of these exports, the higher value-added manufactured products accounting for the balance.

Egypt is One of the main states that founded this association since 1939.

1 - Cultivated Area

It is worth to Mention that Egypt Cultivated 6 commercial varieties, which is classified to Extra long and long stable as follows :

ELS Planted in Lower Egypt (Delta): Giza 88,70,92

LS Planted in Lower Egypt (Delta) : Giza 86

LS Planted in Upper Egypt : Giza 90, Giza 80.

Cotton Planted Area for season 2010/2011 have amounted about 158000 hectare, compared to 121000 Hectare in season before 2009/2010 with an increase about 37000 Hectare, One of the Lowest cotton cultivated area, due to unfair prices to producers and better net profits from alternatives crops especially grains, in the same time costs of cotton inputs, In addition the very high cost of hand picking and insufficient trained picking workers.

Giza 86 was the predominated variety as amounted about 113500 Hectare (72%) of total cotton planted areas with an increase of about 25900 Hectare compared to previous season. The Egyptian Producers prefer to cultivate this variety due to its high



quality & productivity and its high ginning outturn, beside the high demand on it either locally & internationally.

Giza 88 takes the second rank, as the planted area amounted about 28800 Hectare (18%) of the total cotton area with an increase of about 14800 Hectare, compared to the previous season. There are a high demand from international market on this variety for its high spinning utility, in addition to its high productivity and ginning outturn, but there are a limited demand from the local market.

Giza 90 comes in the third rank as the planted area amounted about 10300 Hectare , (6.5 %) of total planted area, with a decrease about 1700 Hectare., Compared to the previous season. It is cultivated in Upper Egypt as it is Tolerance to temperature stress, short duration, high productivity and ginning outturn.

Giza 80 takes the fourth rank, it is cultivated in upper Egypt, the planted Area amounted about 4040 Hectare (2.6%) of cotton area with a decrease about 1960 Hectare to previous season, it is tolerance to the temperature stress, high yield and ginning outrun.

In addition cultivated limited isolation area of Giza 70&92, Beside new strains in cotton research stations, to reserve and maintain genetic purity and breading. Annex (1,2)

2 - Production and Productivity

Cotton crop has slightly increased in season 2010/2011 to amount about 134000 Metric Lint ton, Compared to about 95000 metric Lint ton the previous season 2009/2010 and average yield about 848 Kg/HA season 2010/2011 compared to 785 kg/HA season 2009/2010.

- **Giza 86** is the first as its production amounted about 93785 Metric Lint ton (70%) of total production.
- Giza 88 amounted about 28000 Metric lint ton (21%) of total production.
- Giza 90 amounted about 7817 Metric lint ton (5%) of total production.
- Giza 80 amounted about 3209 Metric lint ton (2%) of total production.
- The others (**Giza 70, 92,** new strains and mixed cotton) amounted about 2% of total production.



In spite of the Egyptian growers do not spare any effort to maximize the yield of cotton hoping to increase their profits, In the same time great effort spend from research and supervision centers, not high yield due to the late planting after winter crops as Egyptian bean and wheat. Either Egyptian area and production in season 2010/2011 were one of the least in the Egyptian cotton history as The Egyptian producers have a negative profit in case of cultivating cotton, unless if (some treatments) as sowing, hoeing and picking are done by family works, so actually cotton cultivated today in Egypt in small acreage by small holders or by leaseholders. (Annex 1, 3)

3 – Local mills demand on Egyptian Cotton

Local Mills were considered the main consumer, for Egyptian cotton as its consumption generally absorbs more than half of total crop, but in the past years local demand on Egyptian cotton have decreased drastically as its prices was so much exceeds mills ability, thus it was substituted with foreign cheaper cotton, in order to fulfill local demand.

. In addition the Egyptian industries consumes cheap foreign yarn to supply Egyptian local market, It is noticeable that Egyptian local mills usually consume about 200,000 metric lint ton annually, yet in season 2010/2011 till half July 2011, Consumption amounted about 32000 Metric lint ton from Egyptian cotton & about 50000 Metric lint ton imported cotton, in addition about 18000 Metric Ton man-made fiber.

Generally the decrease of Egyptian cotton consumption due to the lack of demand on fine count yarn & fine textile and luxury ready made garments as the global financial crises shrinks the demand on high qualities products, also low economic growth effects severely the luxury commodities as fine cotton & high yarns count, fine textile and garments. (annex 1,4).

4 – International markets demand on Egyptian cotton

commitments to cotton for season 2010/2011 increased sharply as it is amounted about to 110950 Metric lint ton, compared to about 80000 metric lint ton cotton in previous season, thus is due to the shortage of global supply due to decrease of world production, world stock and the improvement of yarn demand in the early 2011 and firm economic growth in the first half of the year, (Annex 1, 6).

5- Egyptian cotton Policy

Maintaining the same policy since several years based on the complete freedom in the planting and trading either locally or internationally. Local marketing regime facilitates buying and selling seed cotton freely through collecting centers, set under the supervision of general committee for arranging internal cotton trade, (There are members in this committee represent producers and Traders by direct election), At the



same time the internal price is negotiable between buyers and sellers in the local market, depends on supply and demand forces, as production, stock, other cotton growths, Internal and international economic growth, exchange rate ...etc.

On the other hand export prices are left to interact according to supply and demand forces as well as market trends. Also agreement between Egyptian exporting firms and their abroad clients play an important role in this matter.

It is worth to mention that the export prices in season 2010/2011 was the seller season as the prices increased very sharply either in the local market or Foreign market , the export prices in season 2010/2011 fluctuated weekly but as a general there was increasing trend. As Giza 86 started about 145 Cent/L F.O.B in September 2010 and recorded about 270 in March 2011, In the same time Giza 88 started about 150 and recorded about 300 C/L F.O.B in March 2011.

6 - Outlook season 2011/2012

Cultivated cotton area is expected to increase to about 220000 Hectare to produce about 186000 Metric lint tons, the expected increase in comparison to the season 2010/2011 is about 62000 Hectare in area and about 52000 Metric Lint ton in production.

This expected increase mainly due to the un expected highest prices the producer had ever collected in the history of Egyptian cotton in case of neglecting inflation rate, Also this increase as a result of the limitation of rice area by government to rationalize water consumption for that, farmers are forced to cultivate either cotton or maize as a crop instead of rice, actually season 2011/2012 well start with a limited carryover as shipment and advance payment till half of July 2011 exceeded 80% of total commitment, but expecting the cotton price for season 2011/2012 will decrease due to the reluctant demand from spinning mills due to a little decline in yarn prices and expected increasing in either world production and ending stock.



Appendices



Annex (1)

The Statistical Situation of 2010/2011 season and prediction for 2011/2012, Compared with earlier seasons

	02/03	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12
Cultivated area 1000 Hectar.	297	226	300	274	231	247	134	121	158	220
Production 1000 M. Ton	286	197	290	200	210	240	108	95	130	186
Local Consumpti on 1000 M. Ton	213	120	170	98	80	120	42	77	32	80
Exports 1000 M. Ton	180	70	145	95	81	100	20	80	111	100

^{*} Till mid July 2011. ** Expected



Annex (2)

Area planted according to varieties in the season 2010/2011 compared to that of season 2009/2010 & Predicted season of 2011/2012

Extra long Staple	2009/2010 Hectar.	2010/2011 Hectar.	2011/2012 Hectar. Expected
Gize 88	14440	28816	41081
Giza 92	40	169	414
Giza 70	150	336	0
Total	14630	29321	41495
Long Staple			
Giza 86	87621	113548	158075
Giza 80	6235	4044	5856
Giza 90	12284	10303	15034
Total	106140	127895	178965
Others	215	273	254
Grand Total	120949	157489	220460



Annex (3)

Comparison between production and productivity in 2010/2011 and that of 2009/2010 and predicted season 2011/2012 for all varieties

	2009/	2010	2010/	2011	2011/	2012
ELS	Production M. Ton Lint	Yield Kg./Hectar Lint	Production M. Ton Lint	Yield Kg./hectar Lint	Production M. Ton Lint	Yield Kg./Hectar Lint
Giza 45	-	-	-	-	-	-
Giza 70	88	719	187	600	-	-
Giza 87	-	-	-	-	-	-
Giza 88	12783	885	28000	970	37000	900
Giza 92	30	750	128	750	310	750
Total ELS	12900	882	28315	965	37310	899
Long staple						
Giza 86	67380	769	93785	826	131202	830
Giza 89	-	-	-	-	-	-
Giza 85	-	-	-	-	-	-
Giza 80	5154	827	3209	794	4685	800
Giza 90	9315	758	7817	756	12027	800
Total LS	81849	771	104811	820	147914	827
Other	109	-	218	-	203	-
Grand Total	94858	785	133344	847	185427	842



Annex (4)

LOCAL CONSUMPTION IN THE SEASON 2010/2011 (Metric Lint Ton).

Varieties	Local Consumption till mid July 2011 (M.Ton)
Giza 92	6
Giza 88	690
Giza 70	8
Total ELS	704
Giza 86	23514
Giza 80	1742
Giza 90	6087
Total LS	31343
Grand Total	32047



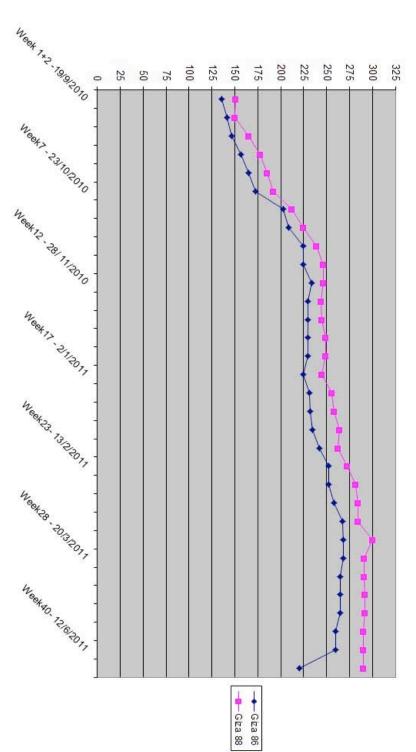
Annex (5) Quantity of commitments cotton Since season 1994/1995 Till mid of July 2011

	ELS		LS		Tot	tal
Season	Quantity 1000 M.Ton	%	Quantity 1000 M.Ton	%	Quantity 1000 M.Ton	%
1994/1995 Basic year	28	100	39	100	67	100
1995/1996	19	68	0	0	19	28
1996/1997	18	64	28	71	46	69
1997/1998	20	71	50	128	70	105
1998/1999	24	86	84	215	108	161
1999/2000	39	140	60	154	99	148
2000/2001	32	114	32	82	64	96
2001/2002	44	157	63	162	107	160
2002/2003	60	214	120	308	180	269
2003/2004	30	107	40	103	70	104
2004/2005	76	269	69	176	145	215
2005/2006	24	86	71	182	95	142
2006/2007	29	103	52	133	81	120
2007/2008	33	118	102	261	135	202
2008/2009	13	46	19	49	32	48
2009/2010	24	86	55	141	79	118
2010/2011	29	103	82	210	111	166



Annex (6)
Egyptian Cotton Average Weekly Prices Season 2010/2011

Date	C/L	FOB
Date	G. 86	G. 88
Week 1+2 -19/9/2010	127	101
Week 3- 26/9/2010	1 = 7	10.
Week 4 -3/10/2010	1 £ ٧	170
Week 5 - 11/10/2010	104	1 1 1
Week 6 - 17/10/2010	170	110
Week7 - 23/10/2010	174	197
Week8 - 31/10/2010	7.7	717
Week9 - 7/11/2010	4.9	770
Week10- 14/11/2010	770	749
Week11- 21/11/2011	440	7 2 7
Week12 - 28/ 11/2010	44.5	7 2 7
Week13 - 5/12/2010	77.	7 £ £
Week14 - 11/12/2010	12.	7 20
Week15 - 19/12/2010	44.	7 2 9
Week16 - 26/ 12/2010	***	7 £ 9
Week17 - 2/1/2011	440	7 60
Week18 - 9/1/2011	771	707
Week19 - 16/1/2011	777	701
Week20 23/1/ 2011	740	775
Weeks 21+22- 7/2/2011	7 5 7	777
Week23- 13/2/2011	707	777
Week24- 20/2/2011	707	7 / 7
Week25 - 27/2/2011	YOX	715
Week26 - 6/3/2011	414	712
Week27 13/3/2011	417	*
Week28 - 20/3/2011	417	791
Week30 - 27/3/2011	410	791
Week31 - 10/4/2011	410	797
Week32 - 17/4/2011	170	797
Week33 - 2/5/2011	47.	79.
Week40- 12/6/2011	41.	44.
Week45- 19/7/2011	**.	44.





Agricultural Research Center Cotton Research Institute Cotton Technology Research Division



The Egyptian Cotton Quality Properties 2010 Crop

(Annual report)

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FIBER QUALITY MEASUREMENTS OF THE 2010 EGYPTIAN COTTON CROP & PROMISING CROSSES

0.15	170	85	0.93	4.5	7.9	35.9	85.1	29.9	4.6	13.0	61.9	Creamy	Giza 90 x Aus.
0.14	155	84	0.93	3.9	7.9	37.8	85.4	30.2	4.0	11.7	65.9	Creamy	Giza 90
0.15	162	98	0.94	4.3	7.8	38.7	85.1	31.0	4.3	12.9	63.1	Creamy	Giza 80
0.15	148	85	0.94	4.1	7.3	41.0	86.7	33.4	4.1	9.1	80.4	White	10229xG.86*
0.14	158	88	0.97	4.4	7.1	45.4	8.78	32.9	4.5	0.0	76.5	White	Giza 86
0.16	136	87	0.96	3.7	6.4	47.5	87.5	34.1	3.8	8.6	77.3	White	Giza 92
0.11	135	86	0.95	3.7	6.9	47.8	88.5	35.7	3.7	11.7	67.3	Creamy	Giza 88
0.12	142	87	0.95	3.8	6.7	45.1	88.3	35.7	3.9	9.3	76.3	White	Giza 70
0.13	110	66	0.95	3.1	6.1	46.7	87.6	36.8	3.2	11.4	66.4	Creamy	G.77xS6*
	Fineness (mtex)	Maturity (%)	Maturity ratio	Micro- naire value	(%)	(g/tex)	iformity dex (%)	(mm.)	ənjev	ness (+b)	ness (Rd%)	l	
				/	Elongation	Strenath	5.5	MHU	aire	Yellow-	Bright-	lor	
al re ugar	urity	ss & mat	Fiber fineness & maturity	Fib	ation	elongation	ength	Fiber length	icron	color	attri	၀၅	Cotton
	Hellts	easure	MICTOIIIAL IIIEASULEIIIEILS	MICI	enath &	Fiber strength &	2.0	\	M	Values of	Valu		
						S	HVI measurements	'I measu	HV				

All cottons were represented by G/FG lint grade

* Promising Cross



YARN QUALITY MEASUREMENTS OF THE 2010 EGYPTIAN COTTON CROP & PROMISING CROSSES

	80s/4.3	тм Сот	80s/4.3 T.M Combed Ring Yarns	Yarns	100s/4	.3 T.M Co	100s/4.3 T.M Combed Ring	g Yarns	140s/4.	4.3 T.M Con	3 T.M Combed Ring Yarns	Yarns
Cotton	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)
G.77×S6	3500	25.90	5.3	9.90	3300	25.50	5.5	10.80	3100	23.25	4.7	11.30
Giza 70	0888	24.60	4.8	10.34	3190	24.00	4.7	12.33	2870	21.54	4.2	12.60
Giza 88	3430	25.00	5.2	10.10	3250	24.50	5.0	11.80	3000	22.33	4.3	12.21
Giza 92	3350	24.40	4.7	10.52	3120	23.75	4.5	12.50	2800	21.32	4.1	12.80
Giza 86	2930	23.10	4.4	12.27	A A		y	100				
10229×G.86	2890	23.67	4.3	12.35				NOS.				
					1 180	11/1/	Į					
)	T 5.4/808	.M Comb	T.M Combed Compact Yarns	ect Yarns	100s/4.3	I.M Com	T.M Combed Compact Yarns	act Yarns	140s/4.3	T.M Com	.M Combed Compact Yarns	ct Yarns
Cotton	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)
G.77×S6	3600	26.70	5.5	9.6	3500	26.20	5.5	10.00	3200	24.00	4.8	11.00
Giza 70	3400	25.20	5.3	10.00	3300	24.65	4.8	11.70	3100	22.11	4.3	12.10
Giza 88	3470	25.70	5.5	9.70	3400	25.00	5.1	11.00	3150	22.80	4.2	11.70
Giza 92	3390	24.90	5.2	10.32	3350	24.50	4.6	12.00	2930	21.75	4.2	12.45
Giza 86	3000	24.21	4.5	12.00	No. of Concession, Name of Street, or other				1			
10229×G.86	3000	24.00	4.4	12.10				1 88	/			
				100					1-			
	30s/3.0	5 T.M Car	30s/3.6 T.M Carded Ring Yarns	Yarns	40s/4.	3 T.M Co.	40s/4.3 T.M Combed Ring Yarns	g Yarns	0			
Cotton	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)	LCSP	Strength (cN/tex)	Elongation (%)	Evenness (C.V.%)				
Giza 80	2500	16.32	6.0	14.30	2660	17.80	6.0	13.40				
Giza 90	2460	16.01	6.0	14.50	2600	17.60	6.0	13.50				
G. 90 x Aus.	2360	15.70	6.0	14.76	2580	17.25	5.8	13.70				



General remarks

- Fiber tests were carried out on one Bale of each variety representing the commercial Egyptian cotton varieties of 2010 crop, besides three promising crosses (Giza 77×S6), (10229 x Giza 86) and Giza 90 x Aus.
- All the tested cottons were represented by Good /Fully Good lint grade.
- The spinning procedures as well as fiber and yarn tests were conducted at the Pilot Spinning Mill and Labs of CRI under standard atmospheric conditions.
- The Pilot Spinning Mill includes compact bale opener, fine opener, carding machine with chute feed provided with short and long term auto leveler, draw frame working with short and long term auto leveler, high speed 36 spindle roving frame, besides compact and ring one frame 96 spindles spinning machine. This modern spinning system enabled the Egyptian cottons to express their unique spinning potential, high spinning efficiency and yarn quality.

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