CCGGA

CALIFORNIA
COTTON
GINNERS AND
GROWERS
ASSOCIATION

World Cotton Balance Sheet

million 480 lb. bales

	2017/18	2018/19	2019/20	2020/21
Beginning Stocks	80.3	81.1	79.9	98.4
Production	124.0	118.6	122.1	113.1
Imports	41.6	42.4	40.7	45.5
Consumption	122.9	120.5	102.9	117.8
Exports	41.7	41.6	41.5	45.5
Unaccounted	0.1	0.0	0.0	0.1
Ending Stocks	81.1	79.9	98.4	93.5

Source: USDA

US Cotton Balance Sheet

million 480 lb. bales

	2017/18	2018/19	2019/20	2020/21
Beginning Stocks	2.8	4.2	4.9	7.3
Production	20.9	18.4	19.9	14.7
Imports	0.0	0.0	0.0	0.0
Consumption	3.2	3.0	2.2	2.3
Exports	16.3	14.8	15.5	15.8
Unaccounted	0.0	-0.1	-0.2	0.0
Ending Stocks	4.2	4.9	7.3	3.9

Source: USDA

2021 West Acreage

	2020 Actual	2021 Intended	% Change
Arizona	125	125	-0.3%
California	34	28	-17.7%
New Mexico	43	44	+3.2%
West	**202**	**197**	**-2.5%**

Total may not add due to rounding.

National Cotton Council of America

U.S. COTTON ACREAGE, YIELD, AN

STATES	2021 USDA PLT INT 3/31/2021
N. CAR.	410
S. CAR.	190
GA.	1200
ALA.	450
FLA.	110
VA.	70
TOT. S.E.	2430
MO.	390
TENN.	290
MISS.	500
ARK.	490
LA.	120
TOT. MEM.	1790
KANSAS	190
OKLA.	510
TEXAS	6800
TOT. S.W.	7500
N. MEX.	34
AZ	115
CALIF.	25
TOT.F.W.	174
U.S.UPLND	11894
TEXAS	20.0
N. MEX.	8.0
AZ	4.0
CALIF.	110.0
TOT. PIMA	142.0
U.S.TOTAL	12036

USDA Classing as of March 12, 2021

SPECS	California	Arizona
COLOR 21	68.80%	79.60%
LEAF	2.06	1.83
MIC	4.2	4.57
STAPLE	37.25	37.1
STRENGTH	32.03	31.56
UNIFORMITY	80.77	81.09

Potential Positive impacts

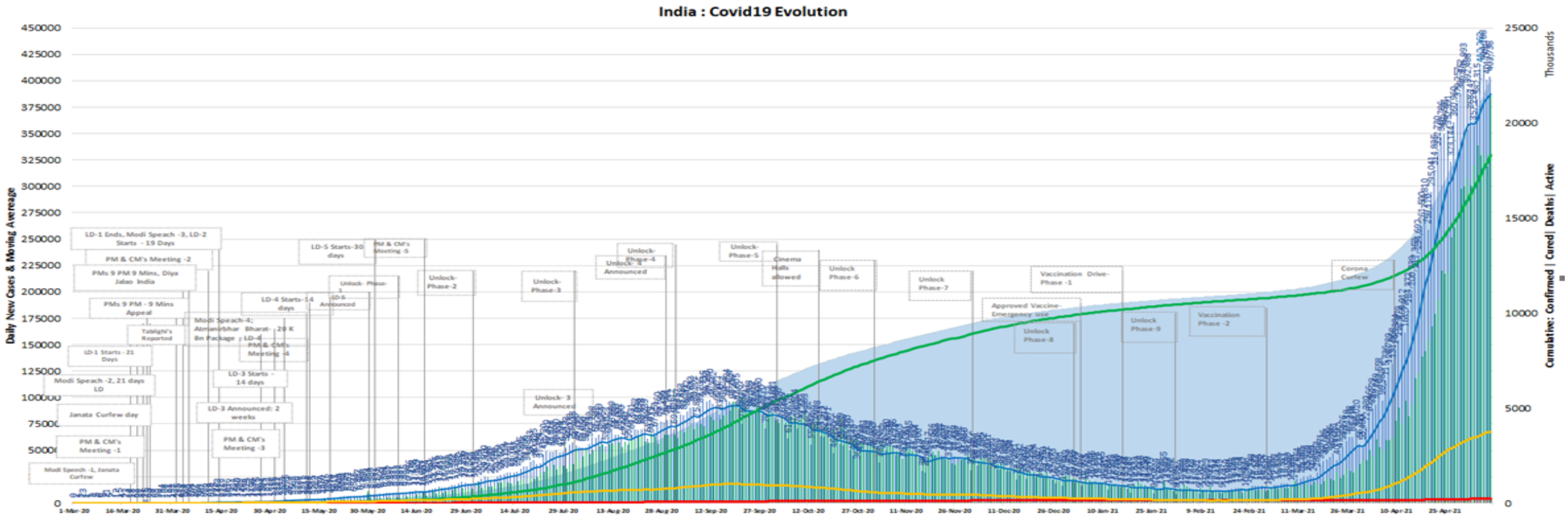
Chinese reserve coming to buy additional US cotton

Planted acres shrinking because of insurance and competing crops

Deficient moisture in Texas adversely affecting the crop

Date	Time	Confirmed	Cured	Deceased	Active	New Cases Daily	Cured Daily	Deceased Daily	Cured %	Deaths %	Ttl Samples Tested	New Samples	Positive %	Daily Positive %	First Dose	% Population for First Dose	Second dose	% Population for Second Dose
30-Apr-21	8:00 AM	18,762,976	15,384,418	208,330	3,170,228	386,452	297,540	3498	82.0%	1.1%	286,392,086	1,920,107	6.6%	20.1%	125,486,929	9.2%	26,758,250	2.0%
1-May-21	8:00 AM	19,164,969	15,684,406	211,853	3,268,710	401,993	299,988	3523	81.8%	1.1%	288,337,385	1,945,299	6.6%	20.7%	127,056,746	9.3%	27,932,889	2.0%
2-May-21	8:00 AM	19,557,457	15,992,271	215,542	3,349,644	392,488	307,865	3689	81.8%	1.1%	290,142,339	1,804,954	6.7%	21.7%	128,171,153	9.4%	28,644,878	2.1%
3-May-21	8:00 AM	19,925,604	16,293,003	218,959	3,413,642	368,147	300,732	3417	81.8%	1.1%	291,647,037	1,504,698	6.8%	24.5%	128,374,277	9.4%	28,823,930	2.1%
4-May-21	8:00 AM	20,282,833	16,613,292	222,408	3,447,133	357,229	320,289	3449	81.9%	1.1%	293,310,779	1,663,742	6.9%	21.5%	129,227,412	9.4%	29,705,509	2.2%
5-May-21	8:00 AM	20,665,148	16,951,731	226,188	3,487,229	382,315	338,439	3780	82.0%	1.1%	294,852,078	1,541,299	7.0%	24.8%	130,044,455	9.5%	30,449,733	2.2%
6-May-21	8:00 AM	21,077,410	17,280,844	230,168	3,566,398	412,262	329,113	3980	82.0%	1.1%	296,775,209	1,923,131	7.1%	21.4%	130,974,851	9.6%	31,538,488	2.3%
7-May-21	8:00 AM	21,491,598	17,612,351	234,083	3,645,164	414,188	331,507	3915	81.9%	1.1%	298,601,699	1,826,490	7.2%	22.7%	132,087,824	9.6%	32,885,234	2.4%
8-May-21	8:00 AM	21,892,676	17,930,960	238,270	3,723,446	401,078	318,609	4187	81.9%	1.1%	300,410,043	1,808,344	7.3%	22.2%	133,112,446	9.7%	34,234,098	2.5%
9-May-21	8:00 AM	22,296,414	18,317,404	242,362	3,736,648	403,738	386,444	4092	82.2%	1.1%	302,275,471	1,865,428	7.4%	21.6%	133,980,544	9.8%	35,459,119	2.6%

COVID-19 Evolution in India:



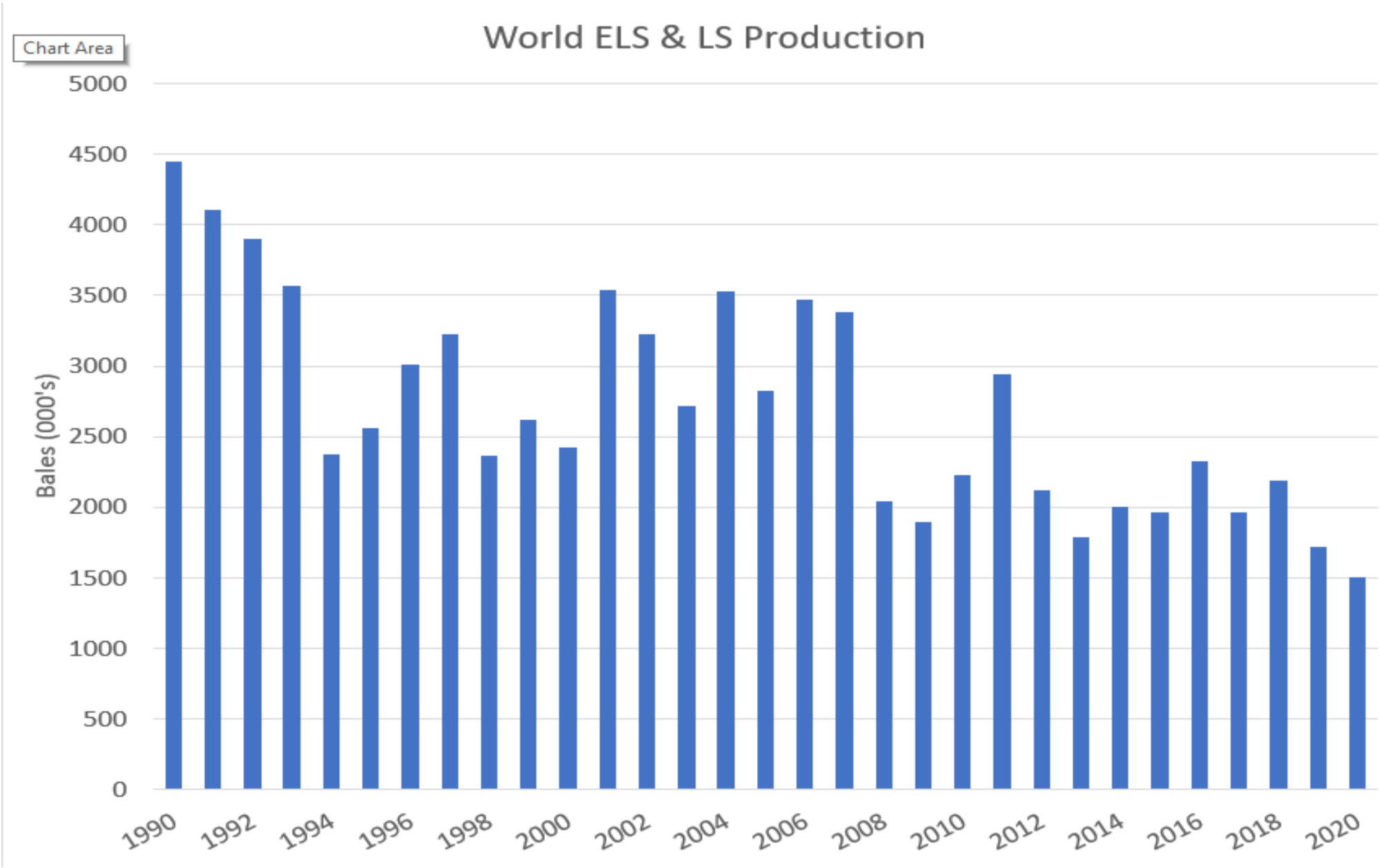
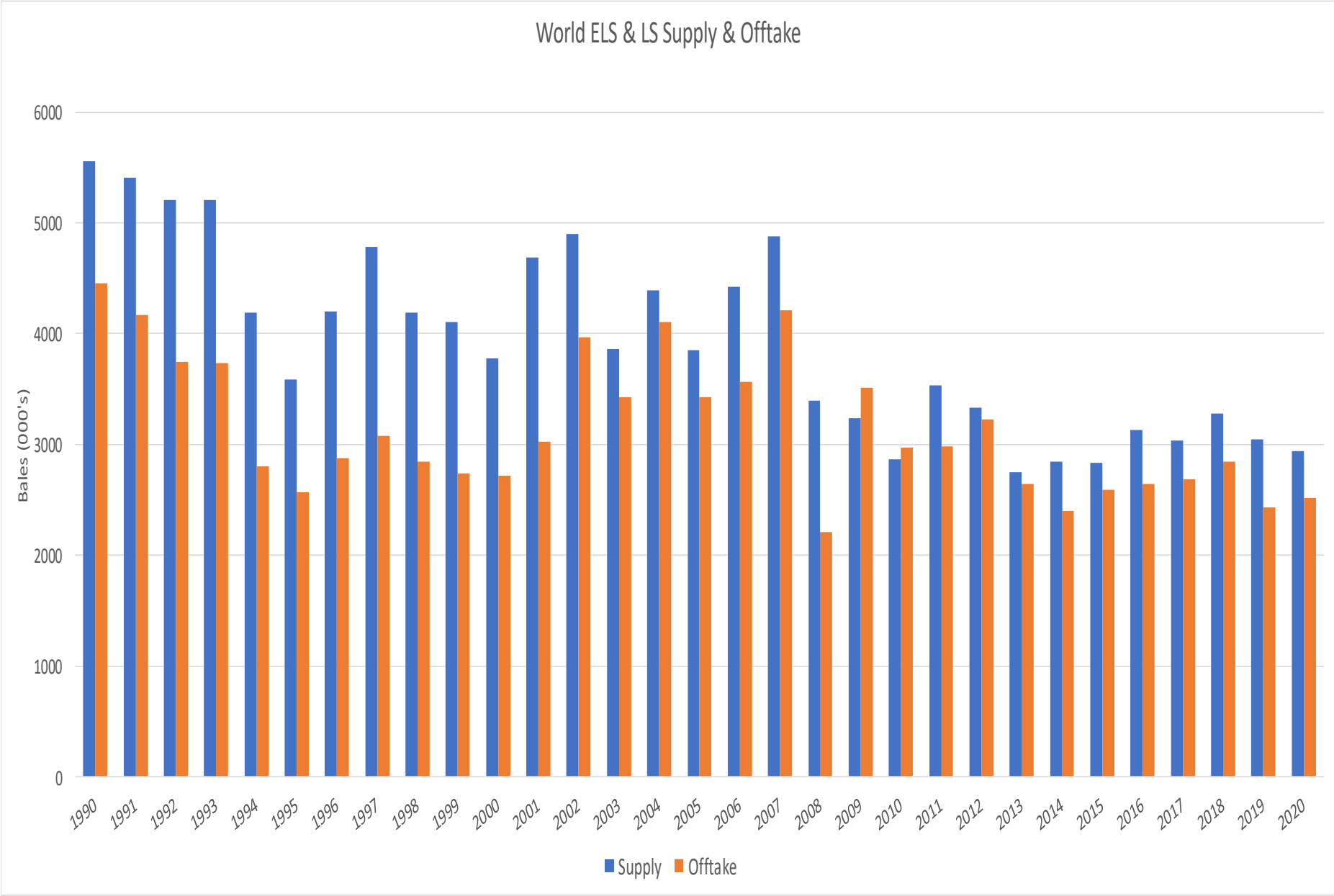
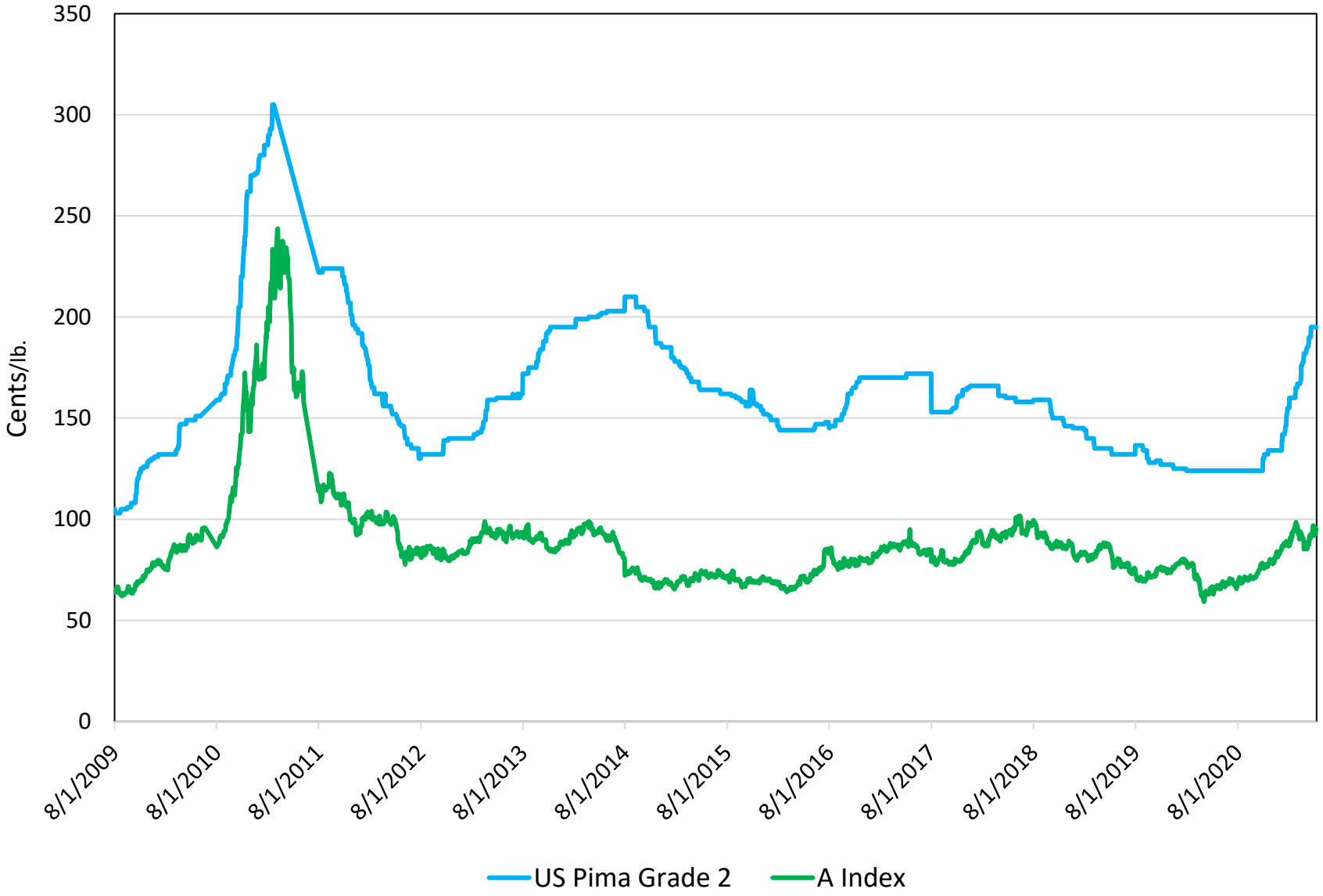


Chart Area
World ELS & LS Production
Bales (000's)
5000
4500
4000
3500
3000
2500
2000
1500
1000
500
0
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020


World ELS & LS Supply & Offtake
Bales (000's)
6000
5000
4000
3000
2000
1000
0
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
Supply
Offtake

ELS PRICE



Source: Cotlook

2020/21 Estimated Pima Production

	Acres	Yield	Production
Arizona	6,500	1,034	14,000
California	147,000	1,562	475,000
New Mexico	11,000	655	15,000
Texas	38,000	743	48,000
Total	202,500	1,362	552,000

Source: USDA

2021 ELS Acreage

	2020 Actual	2021 Intended	% Change
Arizona	7	8	+19.8%
California	147	108	-26.7%
New Mexico	11	11	0.0%
Texas	38	34	-10.5%
ALL ELS	**203**	**161**	**-20.7%**

Total may not add due to rounding.

National Cotton Council of America

2021 U.S. Cotton Acreage

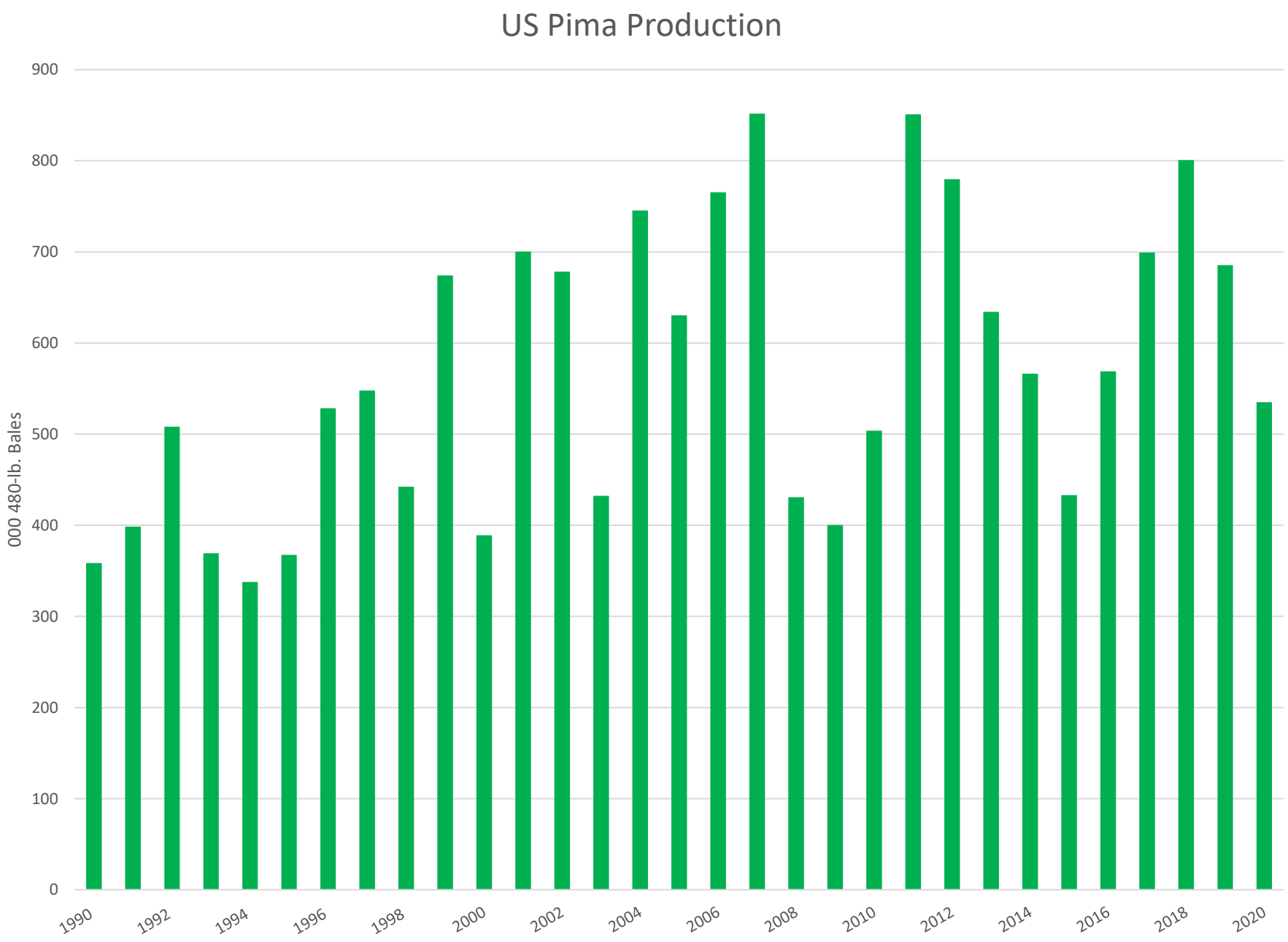
	2020 Actual	2021 Intended	% Change
Southeast	2,368	2,268	-4.2%
Mid-South	1,800	1,733	-3.7%
Southwest	7,520	7,109	-5.5%
West	202	197	-2.5%
All Upland	**11,890**	**11,308**	**-4.9%**
ALL ELS	**203**	**161**	**-20.7%**
All Cotton	**12,093**	**11,468**	**-5.2%**

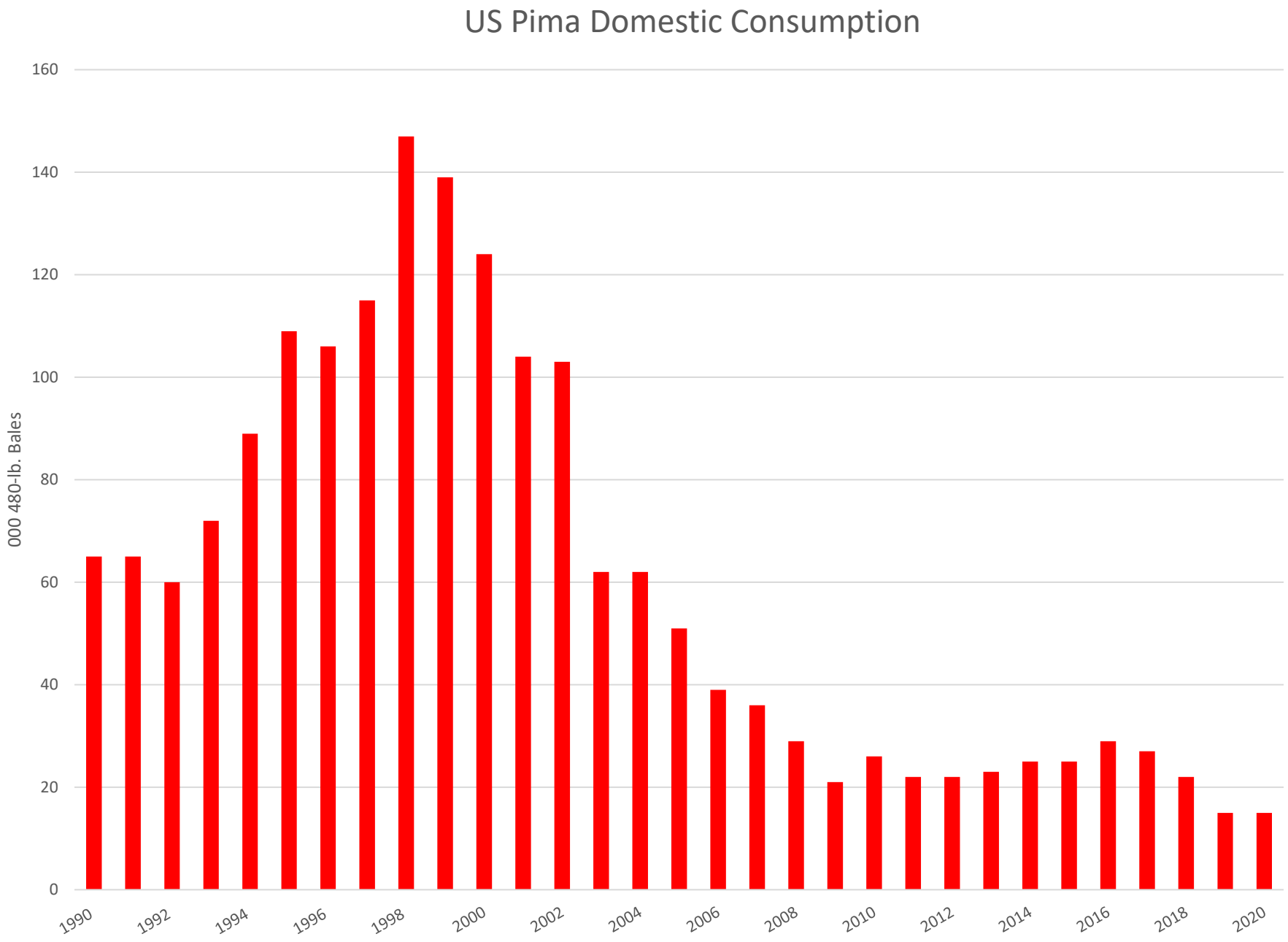
National Cotton Council OF AMERICA

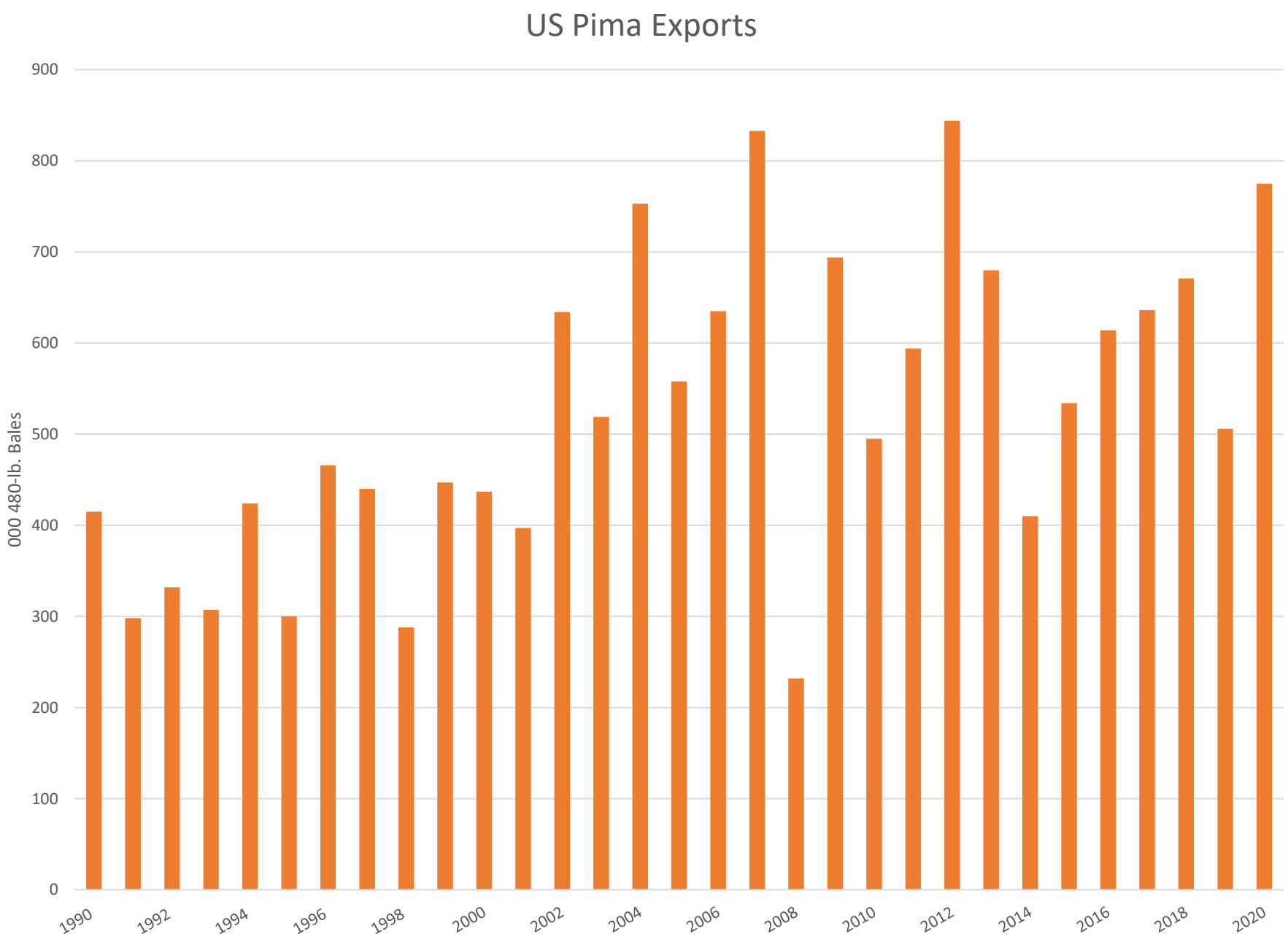
American Pima Acreage

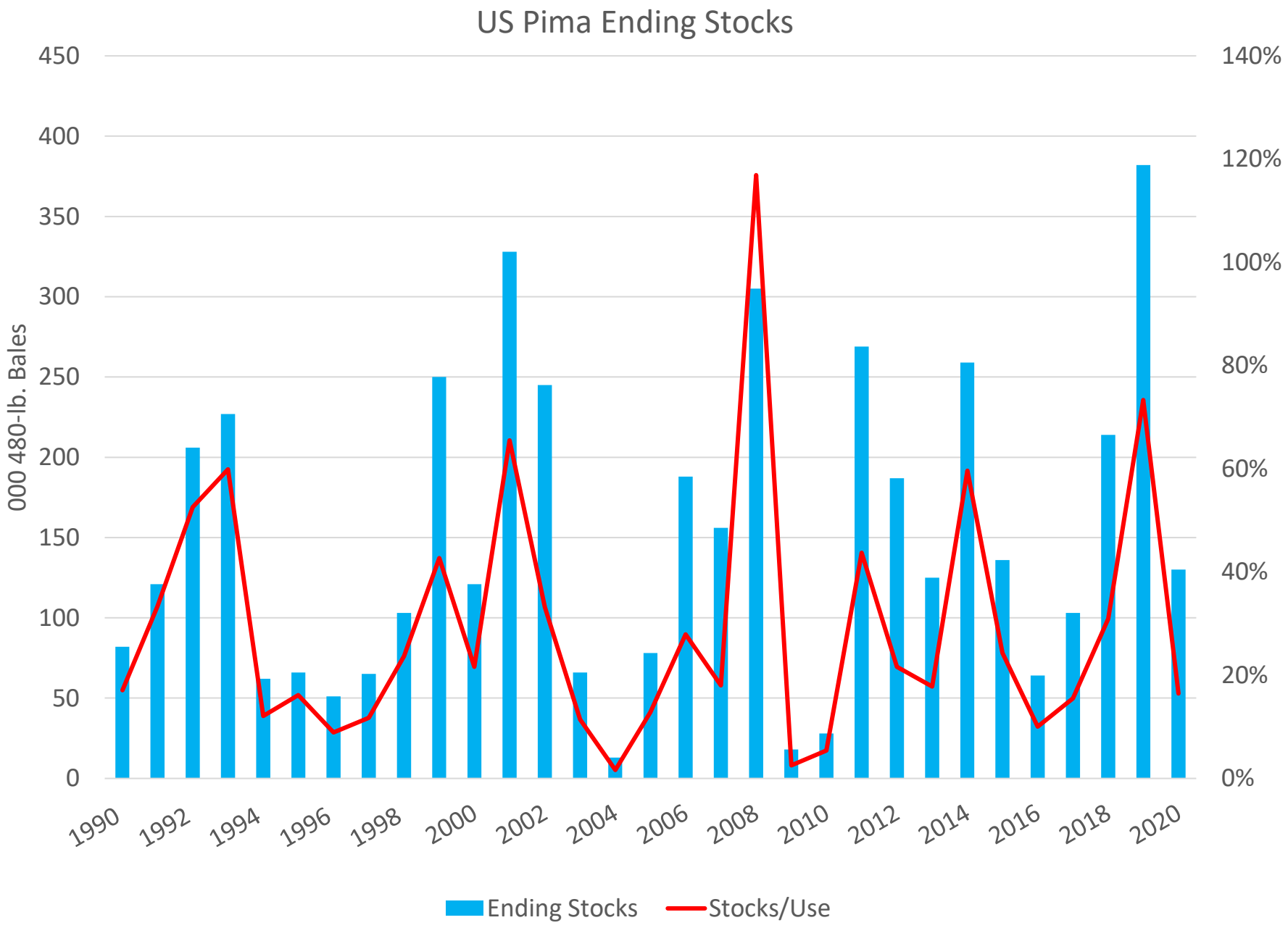
	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Arizona	10,000	3,000	1,500	14,500	17,000	11,000	15,000	14,500	7,500	6,500
California	274,000	225,000	187,000	155,000	117,000	155,000	216,000	211,000	204,000	147,000
New Mexico	3,400	2,400	3,500	5,400	7,000	8,000	7,500	6,800	5,200	11,000
Texas	20,000	8,000	9,000	17,000	17,000	17,000	14,000	18,000	12,000	38,000
Total U.S.	307,400	238,400	201,000	192,400	158,500	194,500	252,500	250,300	228,700	202,500

Source: USDA


US Pima Production
000 480-lb. Bales
900
800
700
600
500
400
300
200
100
0
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020


US Pima Domestic Consumption
000 480-lb. Bales
160
140
120
100
80
60
40
20
0
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020


US Pima Exports
000 480-lb. Bales
900
800
700
600
500
400
300
200
100
0
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020


US Pima Ending Stocks
000 480-lb. Bales
450
400
350
300
250
200
150
100
50
0
140%
120%
100%
80%
60%
40%
20%
0%
1990
1992
1994
1996
1998
2000
2002
2004
2006
2008
2010
2012
2014
2016
2018
2020
Ending Stocks
Stocks/Use

US Pima Export Sales Commitments (Shipped + Unshipped)
in 000 Running Bales
Source: USDA/FAS Export Sales

	2018		2019		2020
Week of Mktg Yr	**Week 39**	**Final**	**Week 39**	**Final**	**Week 39**
AUSTRIA	9680	11845	5844	7204	11951
BAHRAIN	435	693	10041	9600	2521
BANGLADESH	4320	8761	27585	28890	28236
BRAZIL	516	602	258	430	1292
CHINA, PEOPLES REPUBLIC O	253769	241768	87445	108782	165888
COLOMBIA	686	600	429	429	1115
CZECH REPUBLIC			87	87	87
EGYPT	15532	15865	11010	13455	15372
EL SALVADOR	175	3420	17140	17484	8032
GERMANY	2200	2548	2871	2958	1742
GREECE		1044	1479	2175	3858
GUATEMALA	0		1046	1046	1006
HONDURAS	1203	1289	2678	2941	9988
HONG KONG	2236	0	0	0	0
INDIA	203924	210647	183684	191108	272294
INDONESIA	7334	7510	12771	13029	3519
ITALY	173	523	5287	6956	8047
JAPAN	6405	6987	5000	5427	6279
KOREA, REPUBLIC OF	1284	1968	2672	3964	5537
MALAYSIA	255	255	85	170	937
MEXICO	516	688	688	688	688
PAKISTAN	51797	57371	65880	72881	70578
PERU	32218	33009	18776	24936	45152
PORTUGAL	88	175	174	174	348
SLOVENIA	880	880	352	352	88
SWEDEN					1
SWITZERLAND	860	1548	0	0	0
TAIWAN	877	1307	600	600	876
THAILAND	18032	21136	12595	14579	10720
TURKEY	23537	26322	19756	22737	19664
UNITED ARAB EMIRATES					0
UNITED KINGDOM	1360	1275	595	595	255
VIETNAM	58854	59737	46207	46207	76703
DJIBOUTI AFARS-ISSAS				2175	
OMAN				87	
GREENLAND		88			
ETHIOPIA		1305	1305	1305	
Grand Total	699146	721166	544340	603451	772774

Crop year	Supply: Beginning stocks 1/	Supply: Production 2/	Supply: Imports	Supply: Total	Disappearance: Mill use 3/	Disappearance: Exports	Disappearance: Total	Disappearance: Unac-counted 4/	Ending stocks	Stocks/ use ratio	Farm price 5/
	----- 1,000 480-pound bales -----									*Percent*	*Cents/pound*
2004	66	745.6	21	833	62	753	815	-5	13	1.6%	127.0
2005	13	630.5	19	662	51	558	609	25	78	12.8%	124.0
2006	78	765.4	9	852	39	635	674	10	188	27.9%	94.3
2007	188	851.8	6	1,046	36	833	869	-21	156	18.0%	98.8
2008	156	430.9	0	587	29	232	261	-21	305	116.9%	99.0
2009	305	400.4	0	705	21	694	715	28	18	2.5%	117.0
2010	18	503.8	7	529	26	495	521	20	28	5.4%	179.0
2011	28	851.2	6	885	22	594	616	0	269	43.7%	145.0
2012	269	779.8	4	1,053	22	844	866	0	187	21.6%	124.0
2013	187	634.2	7	828	23	680	703	0	125	17.8%	172.0
2014	125	566.4	3	694	25	410	435	0	259	59.6%	155.0
2015	259	433.0	3	695	25	534	559	0	136	24.3%	118.0
2016	136	568.9	2	707	29	614	643	0	64	10.0%	137.0
2017	64	699.5	2	766	27	636	663	0	103	15.5%	139.0
2018	103	801.0	3	907	22	671	693	0	214	30.9%	115.0
2019	214	685.5	3	903	15	506	521	0	382	73.3%	106.0
2020	382	535.0	3	920	15	775	790	0	130	16.5%	

BCI Better Cotton Initiative

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IKEA INDIGENOUS KappAhl Kathmandu KERING Kid KNICKEY Levi's LINDEX LYLE & SCOTT
M&S MANTIS WORLD MARA HOFFMAN MAYAMIKO MetaWear MISTAQUA THE NADHI naturepedic
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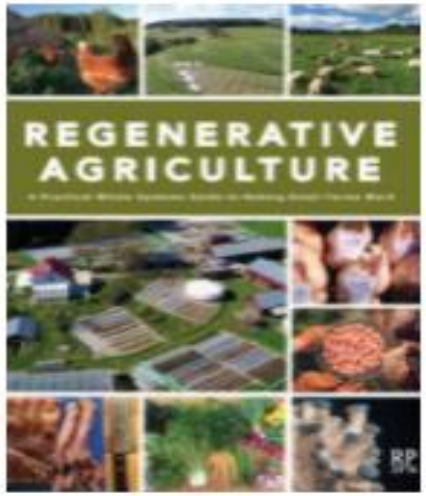
Timberland urban VOLT WE W WOW

REDUCE YOUR
CARBON FOOTPRINT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All commoditites
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Almonds
Apples
Avocados
Beans
Beef
Blackberries
Blue Elderberry
Broccoli
Cherries
Corn
Grapes/Raisins
Grapes/Table
Grapes/Wine
Lemons
Lettuce
Olive Oil
Olives
Onions

udies using the map of California

Current

Commo	gion	County	Year	Production Conditions
Alfalfa	cramento Valley, San Joaquin Valley North	see map	2020	Establish and produce; flo
Alfalfa	ermountain	Siskiyou	2020	Establishment and product
Alfalfa	cramento Valley, Intermountain, San Joaquin Valley South, San Joaquin Valley North	see map	2020	Organic, Establish and Pro
Alfalfa	n Joaquin Valley South	Tulare	2016	50 acre study; Small #125
Alfalfa	n Joaquin Valley South	Tulare	2016	300 acre study; #1300 ba
Alfalfa [pdf]	Sacramento Valley - Northern Delta	see map	2014	Sub-surface drip irrigation
Almonds [pdf]	San Joaquin Valley North	see map	2019	Establish and Produce Alm
Almonds [pdf]	San Joaquin Valley South	see map	2019	Establish and Produce Alm
Almonds [pdf]	Sacramento Valley	see map	2019	Establish and Produce Alm
Almonds [pdf]	San Joaquin Valley North	see map	2016	Organic, solid set sprinkler
Apples [pdf]	Central Coast	Santa Cruz	2014	Various varieties, organic
Apples [pdf]	Central Coast	Santa Cruz	2014	Various varieties, conventi

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PA
VA
NC
TN
SD
MS
AL
GA
TX
LA
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8
LOCAL
THE HILLSBOROUGH COUNTY SCHOOL BOARD WILL MEET AGAIN TOMORR

PSHAM
LOCAL
BAND

The End