



Organic Cotton Market Report 2019

Covering production trends and initiative updates from the 2017/18 harvest year.



TextileExchange
Creating Material Change



Welcome

to the 2019 Organic Cotton Market Report

In 2019, we are at the dawn of an incredibly important decade. We hear world leaders say the next ten years will determine our ongoing ability to sustain life on Earth, and climate data tell us we are not on track to staying below 1.5 degrees temperature rise above pre-industrial levels. These are sobering realities and have resulted in nothing short of a “climate emergency.” Both my sons have taken to the streets during the climate strikes here in the UK, joining millions of young people around the world who are concerned that their parents’ generation will not deliver the United Nation’s Sustainable Development Goals (known as the SDGs or Global Goals) and the “world we want” in time.

So how do climate action and the Sustainable Development Goals tie in to our Organic Cotton Market Report?

Land use was highlighted in the latest report from the Intergovernmental Panel on Climate Change (IPCC). Land is both a source and a sink of greenhouse gases (GHGs) and plays a key role in the exchange of energy, water and aerosols between the land surface and atmosphere. Land ecosystems and biodiversity are vulnerable to ongoing climate change and weather and climate extremes, to different extents. Sustainable land management can contribute to reducing the negative impacts of multiple stressors, including climate change, on ecosystems and societies.

By eliminating the use of synthetic fertilizers and pesticides and building soil fertility, organic agriculture embeds regenerative and circular principles. It reduces dependencies on chemical and fossil-fuel based inputs and potentially plays a key role in reducing greenhouse gas emissions through carbon sequestration. Life Cycle Assessments show that organic agriculture offers a materials pathway towards science-based targets, and it offers a multitude of opportunities to contribute to all 17 SDGs in one way or another.

Organic cotton, alongside other organic land-based fibers, must be part of the future. Organic cotton farmers, organizations, companies, and other enablers represented in this report provide a guiding light. We are proud to bring you our 2019 Organic Cotton Market Report and are committed to leveraging organic cotton as a market-driven solution to industry transformation and meeting the Global Goals.



Liesl Truscott
Director of Europe &
Materials Strategy,
Textile Exchange



One of the most striking images of this year’s UN Climate Summit was Greta Thunberg’s words projected onto the UN Secretariat Building in New York. One phrase – displayed around the level of the 25th floor – said:

“We need a system change, rather than individual change – but you cannot have one without the other”

And nearer to ground level:

“We must all do the seemingly impossible. Everything needs to change, and it has to start today”

Organic production for cotton is the tip of the spear that has been driving change within the sector. It establishes a direction of travel for all of us, starting with regenerative soil practices!

Over the years, Textile Exchange has brought together and catalyzed changemakers from CottonConnect to the Chetna Coalition to the Organic Cotton Accelerator. Working together in partnership, I really do think we can change everything, the whole of us being so much more than the sum of the parts.

Keep the vision, build the bridges and be willing to take the journey!




La Rhea Pepper
Managing Director,
Textile Exchange

Cover Page Photo: VEJA ©Charlotte Lapalus

The year in numbers

2017/18 organic cotton production snapshot

 **180,871 MT**
Organic Cotton
Fiber

 **44,394 ha**
In-Transition
Land

 **356,131 ha**
Organic Certified
Land¹

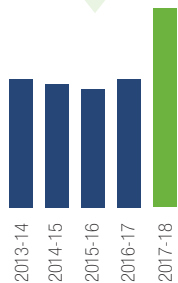
 **+56%**
over 2016/17
Organic Cotton Fiber

56% GLOBAL GROWTH IN ORGANIC COTTON PRODUCTION

Global organic cotton production grew by an impressive 56 percent in 2017/18, well exceeding the previous year's growth rate of 10 percent. Estimates indicate that growth will continue next year, stemming predominantly from India, Tanzania, Turkey, Kyrgyzstan and Brazil, among others.

PRODUCTION AT ITS HIGHEST IN EIGHT YEARS

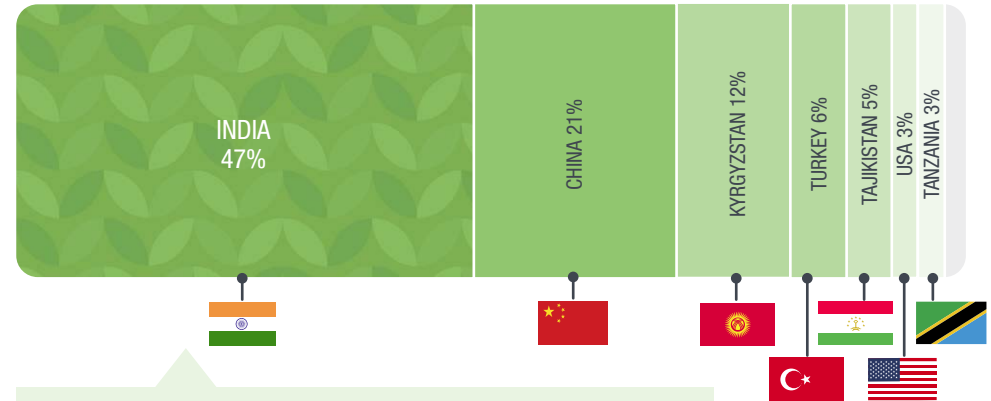
Production of organic cotton declined significantly in 2010/11 in connection with the financial crisis. However, in 2017/2018, organic cotton production reached its highest in eight years.



 **↑ 16%**
 **↑ 15%**

CERTIFIED FACILITIES ALSO ON THE RISE

Not only are production volumes growing, so are the number of facilities certified to voluntary organic standards around the world.



98% GLOBAL PRODUCTION STEMS FROM JUST 7 COUNTRIES

*The remaining 12 countries are: Greece (0.5%); Uganda (0.4%); Benin (0.4%); Burkina Faso (0.3%); Peru (0.3%); Egypt (0.2%); Mali (0.04%); Ethiopia (0.02%); Brazil (0.01%); Senegal (0.003%); Argentina (0.001%); Thailand (0.001%)

19
Countries growing
organic cotton


INDIA, CHINA & KYRGYZSTAN FUEL GROWTH

India, China and Kyrgyzstan contributed most significantly by volume to this year's global growth. This trend looks set to continue, with the same three countries having the biggest land area in-transition to organic.

TOP FIVE BY FIBER GROWTH RATE

Argentina **+300%**
Kyrgyzstan **+178%**
China **+71%**
Turkey **+51%**
Peru **+49%**

TOP FIVE BY FIBER VOLUME INCREASE

India **+ 26,060 MT**
China **+ 16,138 MT**
Kyrgyzstan **+ 14,290 MT**
Turkey **+ 3,911 MT**
Tajikistan **+ 2,594 MT**

TOP FIVE BY IN-TRANSITION LAND AREA

India **25,237 ha**
Kyrgyzstan **9,100 ha**
China **3,669 ha**
Turkey **2,439 ha**
Tanzania **1,297 ha**

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Global organic cotton production

Photo: Dinesh Khanna for C&A Foundation

Global organic cotton production

2017/18 overview



This year, we have a particular reason to celebrate. Not only did global production of organic cotton see an impressive 56 percent growth between 2016/17 and 2017/18; total volumes reached the highest level since 2010/11, when the financial crisis led to a dramatic decline.

Growth stems predominantly from India, China and Kyrgyzstan, but also from Turkey, Tanzania, and Tajikistan. In addition, there were 44,394 ha in transition to organic in 2017/18, stemming largely from these same six countries. This is lower than

the 219,086 ha in transition to organic in 2016/17; a trend that goes hand-in-hand with the 56 percent growth seen in global organic fiber production in 2017/18.

There were an estimated 182,876 farmers growing certified organic cotton in 2017/18, spread across 19 countries. Organic cotton was planted on 349,799 ha of certified land. An interesting trend in India is that farmers significantly increased the proportion of organic certified land used to grow cotton (as opposed to other organic crops) from 45 to 70 percent in 2017/18.

Data revisions

Organic cotton data reported for 2016/17 have been revised from 220,478 farmers, 472,999 ha organic certified land and 117,525 MT fiber production to 219,760 farmers, 472,232 ha organic certified land and 116,147 MT fiber production. These numbers are based on correction and updates collected in the 2019 data cycle, summarized in the table below.

Based on new understanding of how

China-NOP, EU and US-NOP certifications are overlapped on Chinese farms (see [China](#) section for more detail), it is recognized that the 2016/17 data on China requires further adjustments. However, at the time of writing, there is insufficient data to make a conclusive report. Textile Exchange will continue to gain better understanding of the Chinese organic cotton production landscape for future reports.

Country	Organic Farmers		Organic Certified Land (ha)		Organic Cotton Fiber (MT)	
	Reported	Adjusted	Reported	Adjusted	Reported	Adjusted
China	824	429	11,846	11,209	22,521	22,448
Egypt	360	20	542	411	1,742	437
Senegal	277	294	92	-	4	-

Table 1: Revisions to 2016/17 organic cotton production data reported in the 2018 Organic Cotton Market Report.

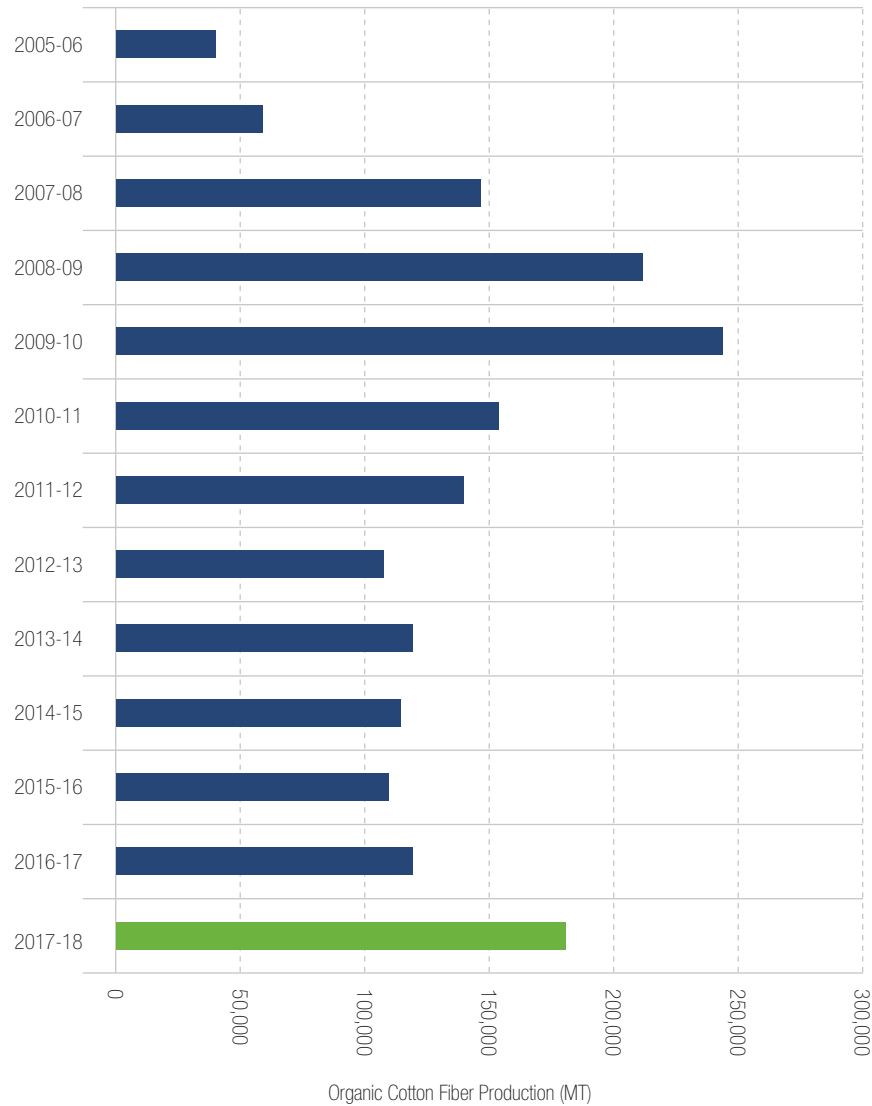
A note on land area

Reported land area figures refer to land certified to an organic standard by a producer group growing organic cotton. However, it's important to note that the same piece of land can be, and increasingly is being, used to grow other organic crops in addition to cotton. Crop rotation is fundamental to organic agriculture but, with the low and falling cotton price in recent years, more and more farmers are moving away from cotton to grow other crops, such as marigold in

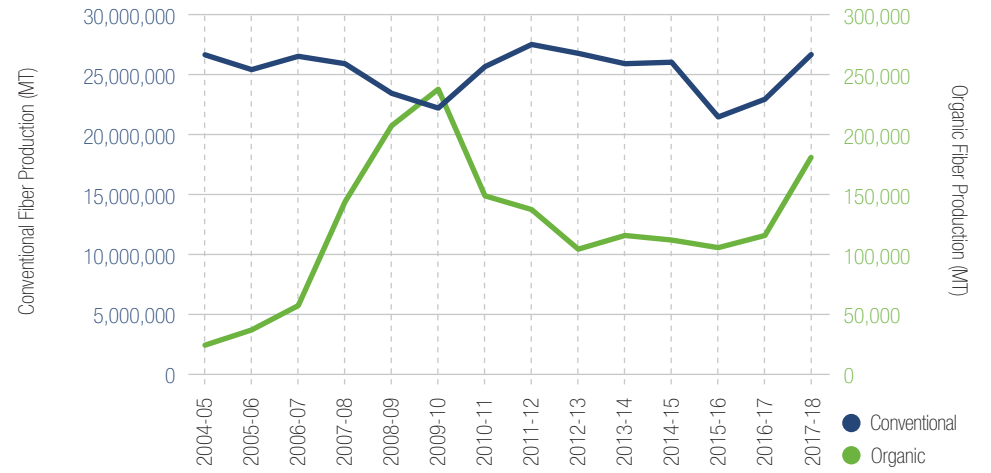
India, which can fetch a higher price on the market. This means that reported land area figures do not necessarily reflect the land area used to grow only organic cotton, and may therefore seem disproportionately high compared to the organic cotton volumes harvested. Where only the total certified land was reported, the average rate of intercrops was applied to derive fiber production. (e.g. in India an estimated 33 percent for intercrops is applied as per Certification Body methodology).

Global organic cotton production

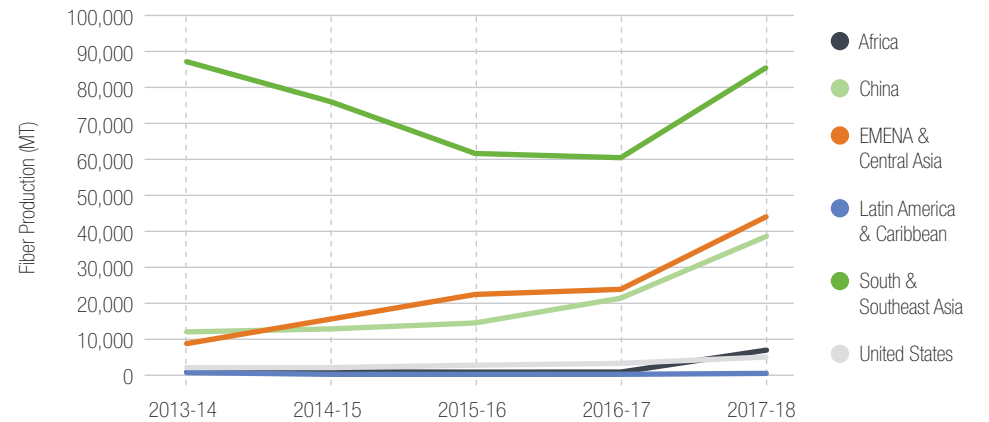
Global trends



COMPARISON BETWEEN CONVENTIONAL AND ORGANIC COTTON PRODUCTION TRENDS



REGIONAL ORGANIC COTTON PRODUCTION - 5 YEAR TRENDS



Global organic cotton production

Initiative insights

“ This year marked a turning point in our efforts to boost the production of organic cotton globally, with early signs that our approach is working and vital recognition from governments. In India, we co-convened Cotton Trailblazers in collaboration with the state government of Madhya Pradesh as a platform for diverse stakeholders to come together for effective action in the organic cotton sector. We have spent the last year deepening engagement with our farmers by taking a critical next step in the form of market linkages. We see a promising trend in connecting farmer collectives with brands directly. This dialogue empowers the farmers to take their produce to market and find their voice as critical members of this complex supply chain.



Lakshmi Poti

Programme Manager, Sustainable Raw
Materials | C&A Foundation

[Read full Q&A with Lakshmi.](#)



Photo: © Dinesh Khanna for C&A Foundation, India

“ Although organic cotton may only make up a small portion of global cotton supply, it plays a critically important role in achieving the Sustainable Development Goals (SDGs). At OCA, our investments are not only transforming and leading to the next generation of organic cotton, but will bring new innovations and progress to sustainability across all sustainable cotton - we call this the “organic effect.”

OCA's Seed, Integrity and Community Investment (SICI) programme invests in the leading participatory breeding and multiplication programme in non-GM cotton seed and is a pioneer in the development of critical integrity interventions and on-product traceability solutions for the sector.

Over the course of the next year, OCA will be developing the sector's first global vision and strategy (Global Strategy 2021-2025) which will serve as the sector's blueprint and roadmap through the next decade and beyond. To inform this strategy, we recently initiated four task forces to address future Farm Engagement and Development (FED) sourcing models, on-product traceability solutions, an expansion of our seed programme, and development of a new narrative for organic cotton. We invite you to join OCA in co-creating the future of organic cotton.



Crispin Argento

Executive Director,
Organic Cotton Accelerator

[Read full Q&A with Crispin.](#)



Global organic cotton production

Initiative insights

“ The Soil Association has been at the forefront of championing sustainable approaches to farming, food, fashion and land use for over 70 years. We developed some of the world’s first organic standards and are a founder partner of GOTS and the 2025 Sustainable Cotton Challenge.

In April, we launched our first ever UK Organic Textile Market Report, which revealed that sales of certified Soil Association Certification organic textiles grew by 18 percent in 2018, with the market now worth £41.3m. Our licensees’ growth was profiled across fashion (+22 percent), homeware (+64 percent), children and babywear (+17 percent) and personal care (+7 percent). We’ve also been working to improve consumer awareness of the benefits of organic to people and planet. Partnering with the charity HUBBUB, we’ve produced video content, including a 17 minute deep-dive film called Investigating Organic Cotton – and five shorts for social media.



Sarah Compson
International Development Manager,
Soil Association

[Read full Q&A with Sarah.](#)



German Partnership for Sustainable Textiles (Textilbündnis)

Textilbündnis, an initiative of GIZ, requires members to gradually increase the proportion of sustainable cotton they use. In 2018, approximately 10 percent of the cotton sourced by members was organic, and 30 percent from other sustainable sources. With that, the goal for 2020 was already achieved. A new target has been set for 2025, by which Partnership members together aim for 20 percent of cotton sourced to be organic, and 50 percent from other sustainable sources.

The Partnership is currently working on setting up a joint initiative to increase the amount of organic cotton available, focusing on capacity building, awareness raising, knowledge exchange and networking in cotton-producing countries.

[Find out more ▶](#)

Photos: GIZ in-factory training (top left); GIZ Fabrik PST initiative Tamil Nadu (bottom left and right) | ©M.Janinhoff

Achieving the SDGs through organic cotton

How does organic cotton contribute to the Global Goals?



Organic cotton farming has a major role to play in helping countries achieve each of the SDGs. Find out how below or read [Textile Exchange's full briefing](#).



Organic cotton is a market-driven solution to poverty. Farmers can earn more, spend less on inputs, and reduce dependency on the commodity market.



Organic cotton is usually grown alongside and in rotation with a variety of food crops, contributing to food security.



Organic cotton farmers and their families are not exposed to the toxic chemicals used in conventional farming.



Higher financial returns result in organic cotton farming communities being able to invest in education, often through the investments of supply chain partners.



Many organic cotton farmers are women, particularly in Africa and Asia. Around 10 percent of organic farmers globally are women, and have control of their farms.



As organic cotton does not use toxic pesticides or synthetic fertilizers, it does not cause chemical contamination of local water sources.



Organic farming communities are increasingly using solar and biogas as an energy source, particularly where access to electricity is limited.



Globally, approximately 200,000 people are certified to organic standards, mostly smallholder farmers. Many more are farming to organic or agro-ecological criteria.



Organic cotton production is the basis for the new global textile infrastructure – sustainable, ethical, transparent, and verified.



In some countries, particularly on the African continent, organic production is considered pro-female. No heavy spray units to carry or risk to pregnant women or mothers.



Higher financial returns, absence of toxic chemicals (and illness), and satisfaction of working in farmer associations encourages more people to stay on the land.



Organic “life choices”, whether at the farm, the factory, in retail or in the home, promote healthy choices for all.



Organic soils sequester carbon as a key component in soil building and improved soil fertility. No dependency on synthetic fertilizers which draw heavily on fossil fuels.



By eliminating toxic and persistent pesticides, organic cotton production is a proactive contributor to clean and healthy water.



Organic cotton farms build fertile soils and biodiversity by rotating crops, minimizing tillage, and planting cover crops.



Many organic cotton farming operations are cooperatives, respecting democracy, and working collaboratively to create shared value.



A fundamental element of organic cotton production is its strong commitment to global partnerships and cooperation - recognizing the interdependencies at play.

Spotlight on seed

How far have we come?

Access to non-GM seed suitable for organic cotton production is critical for ensuring both integrity and growth of organic cotton production.

In 2015, Textile Exchange released an explorative study, [Seed Availability for non-GM cotton production](#), in collaboration with Louis Bolk Institute, Lanting Agriconsult, FiBL and Texas A&M AgriLife Research. The report provided a bird's eye view of worldwide and region-specific availability of non-GM cotton seed, as well as insights on contamination issues and trends. In countries where GM cotton was predominant at the time, almost 90 percent of respondents felt it was "difficult" to "impossible" to access non-GM seed.

Four years on, there has without doubt been growth in the efforts being made to tackle the seed issue. You can see some examples throughout this report, including:

- [Seeding the Green Future, India](#)
- [Texas A&M AgriLife Research, US](#)
- [Seed trials, Myanmar](#)
- [Fairtrade & Vasudha, India](#)
- [bioRe, India](#)
- [Solidaridad, India](#)
- [Seed trials, Central Asia](#)
- [Government seed program, Egypt](#)
- [Seed efforts, Pakistan](#)

However, many organic cotton farmers continue to face difficulty sourcing non-GM seed, a problem that risks undermining the integrity of organic cotton.

GM contamination is an issue in countries where GM dominates the cotton landscape. Causes of GM contamination include: accidental use of GM seed; cross-pollination from neighboring crops; contamination from farm equipment; and accidental mixing during storage, transport or ginning.

In line with the work of Textile Exchange's integrity workstream, we this year collected updates from organic cotton producers regarding the level of difficulty they currently face in sourcing non-GM seed. Table 2 on the right gives a high-level overview of responses by country, as well as the current status of GM approved crops as per ISAAA's GM Approval Database.

It is clear that access to non-GM seed remains a critical issue in certain regions, particularly India, Pakistan and China. The need for focused investment in organic seed production remains.



Click the links on the left to jump to these updates, or keep an eye out for this icon throughout the report.

Region	Country	GM cotton grown in 2018? ¹	GM crops approved as of October 2019 ²	Difficulty sourcing non-GM cotton seed? ³
Africa	Benin	No	None	N/A
	Burkina Faso	No	Cotton ⁴	No
	Ethiopia	No	Cotton ⁵	No
	Mali	No	None	N/A
	Senegal	No	None	N/A
	Tanzania	No	None	N/A
	Uganda	No	None	N/A
	China	Yes	Argentine Canola; Cotton; Maize; Papaya; Petunia; Poplar; Rice; Soybean; Sugar Beet; Sweet Pepper; Tomato	Yes
EMENA & Central Asia	Egypt	No	Maize	N/A
	Greece	No	None	N/A
	Kyrgyzstan	No	None	N/A
	Tajikistan	No	None	N/A
	Turkey	No	Maize; Soybean	N/A
Latin America	Argentina	Yes	Alfalfa; Cotton; Maize; Potato; Soybean	No data
	Brazil	Yes	Bean; Cotton; Eucalyptus; Maize; Soybean; Sugarcane	Seldom
	Peru	No	None	N/A
South Asia	India	Yes	Cotton; Soybean	Yes
	Myanmar	Yes	Cotton	Seed trials underway
	Pakistan	Yes	Cotton; Maize	Yes
	Thailand	No	Maize; Soybean	N/A
	USA	Yes	Alfalfa; Apple; Argentine Canola; Chicory; Cotton; Creeping Bentgrass; Flax; Maize; Melon; Papaya; Plum; Rice; Rose; Soybean; Squash; Sugar Beet; Sugarcane; Tobaccos; Tomato; Wheat	Seldom

Table 2: Risk of GM contamination / issues accessing non-GM cotton seed

● Low risk ● Medium risk ● High risk

1 ISAAA. 2018. Global Status of Commercialized Biotech/GM Crops in 2018: Biotech Crops Continue to Help Meet the Challenges of Increased Population and Climate Change. ISAAA Brief No. 54. ISAAA: Ithaca, NY.

2 As per ISAAA's GM Approval Database.

3 Based on responses from organic cotton producers and Textile Exchange Regional Ambassadors.

4 GM Cotton was phased out of Burkina Faso in 2016.

5 Ethiopia gave environmental release approval for Bt cotton in 2018.

Spotlight on seed

Where do we need to go?

“ There is a growing demand from consumers for organic textiles, but production of organic cotton is limited with a minimal supply of quality, non-GM seed. The sustainability of the organic sector very much depends upon a secure supply of non-GM seed. Many organisations are looking for a long-term solution. We believe that a sector-wide collective effort will be a much more efficient way to improve the availability of non-GM cotton seed specifically suited to the context of smallholder organic cotton farmers. Much has been received in the last 8 years and many cultivars developed under this project [Seeding the Green Future] are in the pipeline. However, there are numerous challenges ahead that still need to be addressed.



Amritbir Riar
Senior Scientist,
FIBL

[Read full Q&A with Amritbir.](#)



Photo: Seeding the Green Future

Call to Action

In 2017, 80 percent of cotton production worldwide was genetically modified. In India, China and the US – three of the biggest producers of organic cotton – this figure was 95-96 percent.¹ As a result, farmers in some of the most important organic cotton growing regions continue to face severe difficulty accessing good quality, non-GM cotton seed, and this is undermining the integrity of organic cotton.

What can and should you do to help?

INVEST IN SEED PROGRAMS

In order to ensure accuracy and confidence in organic farming outputs, a considerable increase in the investments being made in organic seed breeding and multiplication is urgently needed.

DEVELOP AN ORGANIC COTTON SAFEGUARDING PROGRAM

1. **BE PROACTIVE** in exploring available options to source organic seed (including examples in this report).
2. **PARTNER WITH OTHERS** who run seed programs to share costs, learnings, and to ensure you obtain quality organic seed.
3. **TEST REGULARLY** to verify you are obtaining and using organic seed.
4. **MONITOR THE SUCCESS** of testing and investigate further if GMO contamination is found.
5. **SHARE LEARNINGS** so others can benefit from your investments in time and effort.

¹ ISAAA, 2017. Global Status of Commercialized Biotech/GM Crops in 2017. Biotech Crop Adoption Surges as Economic Benefits Accumulate in 22 Years. ISAAA Brief No. 53. ISAAA: Ithaca, NY.

Organic Cotton Round Table

Conventional cotton, based on chemical and water intensive agriculture, has no future in tomorrow's sustainable textile world. Organic cotton is the gatekeeper of traditional knowledge, science, technology, and social innovation for the industry, steeped in the principles of Ecology, Health, Fairness and Care. Yet, growers, processors and vendors of organic cotton operate in a highly autonomous market environment. On the one hand, this autonomy allows independence and a market-driven approach to address sustainable development while, on the other hand, there is no central structure to support the organic cotton community.

Textile Exchange declared a Call to Action and initiated the Organic Cotton Round Table (OCRT) in 2012, prompted by a decline in organic cotton production despite a growing demand.

Annual OCRT Summit

Every year since its inception, the OCRT has held a one day in person meeting alongside Textile Exchange's annual Textile Sustainability Conference. The OCRT is highly interactive and action-oriented, and is typically attended by 150-200 individuals including farmer representatives, manufacturers, brands, retailers, traders, NGOs, and trade associations.

The OCRT quickly became THE place and space for stakeholders to get together to hear more about issues facing the organic cotton sector, to diagnose these issues and, most importantly, find ways to take action.

Focus areas and outputs

Since its inception, the OCRT has focused on addressing key challenges in the stability and sustainable growth of the



organic cotton sector at a global level through the lens of three Task Forces: Business Models, Seed and Soils, and Consumer Engagement.

Under these Task Forces, the OCRT identified a number of initiatives and has either catalyzed, or been an incubator for, their development. Such initiatives include the Organic Cotton Accelerator, the Chetna Coalition, aboutorganiccotton.org (a microsite dedicated to organic cotton), an inventory of non-GMO seed availability, and the OCRT Innovation Award.

Regionalization

After a number of years of approaching barriers to growth in organic cotton at

the global level, the need to customize strategies at the regional level become increasingly apparent. Ultimately, the same issues and opportunities exist for all, but each region is at a different stage of development and therefore requires a different strategy, alongside designated resources and networks of supporters.

As a result, the Regional OCRT was born in 2017. So far, Regional OCRTs have been held in [Turkey](#) (2017, 2018), [Burkina Faso](#) (2018), and [China](#) (2019). For 2020, we are exploring options to host Regional OCRTs also in Latin America, East Africa, and again in Burkina Faso.



Photos: Textile Exchange Organic Cotton Round Table 2017 (left) and 2015 (right)

2019 Organic Cotton Round Table | Vancouver

The [2019 OCRT](#) took place in Vancouver on Friday October 18, 2019, just after Textile Exchange's annual conference. The cross-cutting theme of the day was [Greater Together | SDG](#)

[17: Partnership for the Goals](#), with some of the greatest partnerships in the world of organic cotton being celebrated alongside the progress being made in production, seed, and integrity.

Global organic cotton production

Stakeholder directory

This map locates the headquarters of some of the key international organizations¹ working on organic cotton. Region-specific activities are detailed later in this report.

UNITED KINGDOM

[CottonConnect](#)

Non-profit



[Fairtrade International](#)

Voluntary Standard



[Pesticide Action Network UK](#)

Non-profit



[Soil Association](#)

Non-profit



THE NETHERLANDS

[Solidaridad Network](#)

Non-profit



[Organic Cotton Accelerator](#)

Non-profit



Supply Chain Intervention: Standards/Chain of Custody Market making

Field-level Intervention: Field data & analytics Development Seed breeding Field capacity building & training Cotton cultivation/processing

Informing & Convening: Education & awareness raising Market research & analytics Multi-stakeholder platforms

UNITED STATES

[Textile Exchange](#)

Non-profit



[Organic Trade Association](#)

Industry Association



SWITZERLAND

[bioRe Foundation](#)

Non-profit



[C&A Foundation](#)

Non-profit



[FiBL](#)

Research Institute



[Helvetas](#)

Non-profit



GERMANY

[GIZ](#)

Non-profit



[Global Organic Textile Standard](#)

Voluntary Standard



[IFOAM-Organics International](#)

Non-profit



SOUTH AFRICA

[OrganiMark](#)

Service Company



Africa



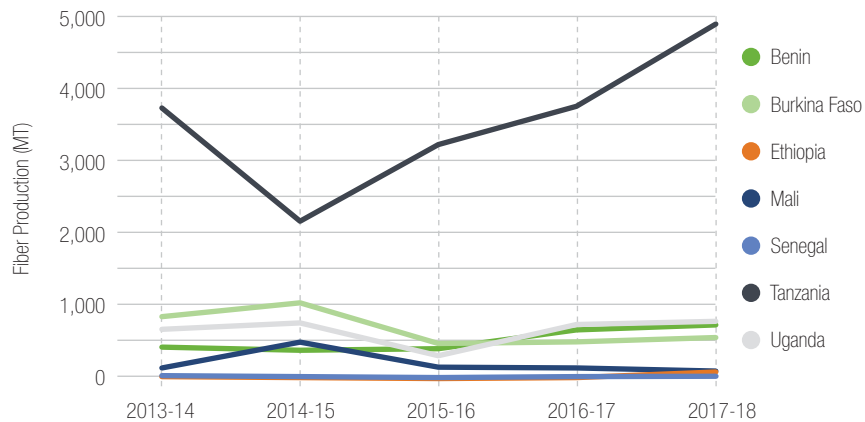
Photo: NAMA Habiba, organic cotton farmer, Burkina Faso © @CottonDiaries

Africa

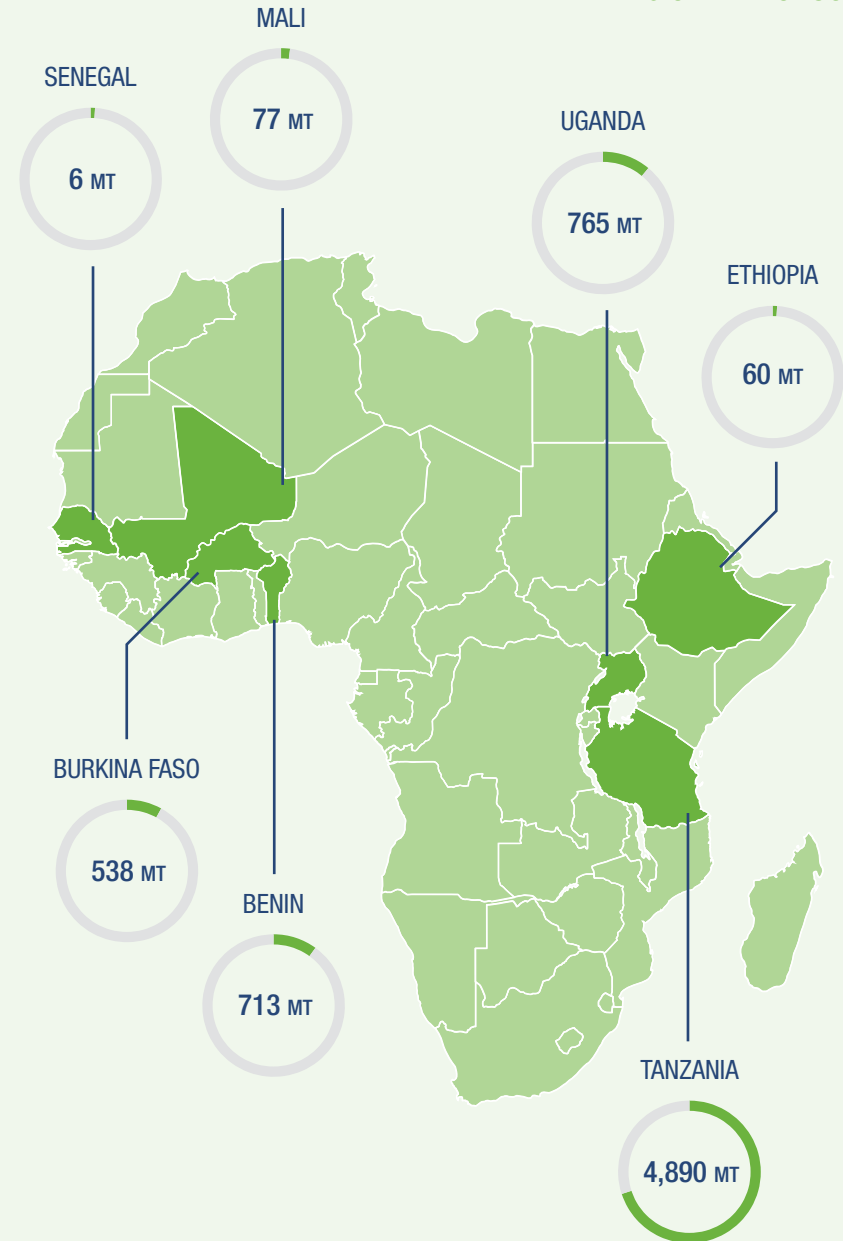
2017/18 organic cotton production



5-YEAR PRODUCTION TRENDS



REGIONAL PRODUCTION



Africa

Regional updates

- Dec 2017** Bamako, Mali Launch of the West Africa Organic Fairtrade Cotton Coalition (CCBE).
- Feb 2018** Koudougou, Burkina Faso Construction started on the first organic cotton gin in West Africa.
- Sep 2018** Koudougou, Burkina Faso First edition of the Salon International de Coton et du Textile (SICOT).
- Sep 2018** Koudougou, Burkina Faso Textile Exchange's first Regional Organic Cotton Round Table in West Africa.
- Sep 2018** Koudougou, Burkina Faso CCBE workshop for platform partners from member countries.
- 2019** Tanzania Inauguration of two new organic cotton projects managed by Tanzania's Government District Council.
- Oct 2019** Geneva, Switzerland World Cotton Day, an initiative of the C-4 (Benin, Burkina Faso, Chad and Mali).
- Oct 2019** Vancouver, Canada Network meeting hosted by Textile Exchange's Pan-Africa Sourcing Working Group to celebrate African cotton.
- Nov 2019** Accra, Ghana West African Organic Conference.
- Nov 2019** Tanzania National Ecological Organic Agriculture Conference.
- Dec 2019** Koudougou, Burkina Faso Expected completion of the first organic cotton gin in West Africa.
- Jan 2020** Koudougou, Burkina Faso Second edition of the Salon International de Coton et du Textile (SICOT)

Photos: Textile Exchange Regional Organic Cotton Round Table 2018 in Koudougou, Burkina Faso

Textile Exchange's first Regional Organic Cotton Round Table West Africa

September 2018 saw the launch of Textile Exchange's first Regional Organic Cotton Round Table in West Africa. It was held in Koudougou, Burkina Faso, in collaboration with CRS and USDA during the Salon International du Coton et du Textiles, which brought together nearly 800 participants from 33 countries.

[Find out more ▶](#)



Market Opportunity Scoping Project

The agenda for the above mentioned Regional OCRT was framed around insights from the Market Opportunity Scoping Project (MOSP) carried out by Change Agency for Textile Exchange. The MOSP framework is based on Appreciative Inquiry: asking questions of a range of stakeholders involved in cotton in Africa to unearth the positives in the situation and identify any blockages to progress.

[MOSP Key Insights ▶](#)



Africa

Out of the Box: West Africa's Cotton Trailblazers

Through 2019, Textile Exchange released a powerful and thought-provoking [series of interviews](#) filmed during the 2018 Regional OCRT in Burkina Faso as part of our collaboration with CRS and USDA. The series gives unique insight into the

wealth of talent, knowledge and leadership that exists in West Africa's cotton sector; one that is fast gaining attention on the international stage. This page shows the interviewees featured in the series. Click a name to link through to the interview.



[Boubacar Kamissokho](#)
CRS/RECOLTE, Burkina Faso

[Carla Brown-Ndiaye](#)
CRS, Burkina Faso



[Jaqueline Shaw](#)
Africa Fashion Guide, UK



[François Yameogo](#)
François 1er, Burkina Faso



[Bambou Bihoun](#)
UNPCB, Burkina Faso



[Heather Chaplet](#)
Xoomba, USA



[Arun Ambatipudi](#)
Chetna Organic, India



[Paul Allen](#)
Ethical Apparel Africa, UK



[Harouna Kaboré](#)
Minister of Trade, Industry and Crafts, Burkina Faso



[Bintou Diallo](#)
Agency for the promotion of investments, Burkina Faso



[Moussa Kaboré](#)
Special Advisor to the President, Burkina Faso



[Rodrigue Tougma](#)
CRS, Burkina Faso



[Pascal Rouamba](#)
SDC, Burkina Faso



[Jan Sass](#)
Cotton Expert House Africa



[Tobias Meier](#)
ecos, Switzerland



[Djeneba Pagabelem](#)
UNPCB, Burkina Faso



[Prof. Simplicie Davo](#)
OBEPAB, Benin



[Bená Burda](#)
Maggie's Organics, USA



[Justin Hendrix](#)
Ethical Apparel Africa, USA



[Christian La Pietra-Fung](#)
USAID, Burkina Faso

Africa



Benin | 2017/18 organic cotton production



In Benin, organic cotton is produced by two organizations: UCCOP BIO and OBEPAB.

UCCOP BIO is located in the northwestern part of the country in Tanguieta, Banikoara and Pehunco. UCCOP BIO's farmer numbers and fiber production both roughly doubled between 2016/17 and 2017/18, with a slight increase also anticipated for 2018/19.

OBEPAB is located in the central and northern parts of the country, in Kandi, Gogounou, Sinende, Glazoue and Djidja. The company SODECO buys and gins all of OBEPAB's organic seed cotton and has

exclusive export rights. OBEPAB's farmer numbers increased from 2,337 to 2,825 between 2016/17 and 2017/18, although both land area and fiber production dropped slightly. A fairly significant increase in fiber production (to 820 MT from the current 544 MT) is anticipated for 2018/19.

The price per kg of organic seed cotton in Benin is defined by the Council of Ministers, and is above that of conventional cotton.

At 713 MT, organic represents approximately 0.3 percent of Benin's total cotton production.

Photo: WFP South-South Cooperation project



Sustainable cotton production as an alternative to achieving zero hunger

Beyond Cotton is a joint initiative of the Centre of Excellence against Hunger and the Brazilian Cooperation Agency, supported by the Brazilian Cotton Institute. The project aims to support smallholder cotton farmers and public institutions in African countries (currently Benin, Tanzania, Mozambique, and Kenya) by linking cotton by-products and associated food crops to reliable markets and important initiatives such as school feeding programs.

[Find out more ▶](#)

“What inspires me in the organic cotton sector is the growing emancipation among farming communities. Producers are increasingly taking control of their own destinies and young people are staying to live in their villages and contribute to community development. My vision for the sector is to develop an alliance between stakeholders to create win-win partnerships.”



Simplicio Davo Vodouhe

Coordinator, Organisation Béninoise pour la Promotion de l'Agriculture Biologique (OBEPAB)

[Read full Q&A with Simplicio Davo.](#)

[Listen to Simplicio Davo's "Out of the Box" interview.](#)

Africa



Burkina Faso | 2017/18 organic cotton production



In Burkina Faso, organic cotton is produced under the National Union of Cotton Growers of Burkina (UNPCB), and certified by ECOCERT according to EU and American NOP standards. It's important to note that production of organic cotton in Burkina Faso follows a failed attempt at introducing GM cotton, which was phased out in 2017 due to its poor fiber quality. Also important to note is the current security issues the country is facing, alongside negative impacts of the changing climate.

Despite this, 2017/18 saw an increase in organic cotton farmers, land area, and fiber

production, although these are expected to decline in 2018/19 due to the worsening security situation.

The main technical and financial partner of UNPCB is Catholic Relief Services (CRS) who's RECOLTE project, which has led to impressive yield increases of UNPCB farmers, will unfortunately come to a close at the end of 2019. However, CRS will open a new organic cotton gin at the start of 2020 - the first in West Africa - which will hugely benefit the organic community.

In 2018, Textile Exchange partnered CRS on a series of activities - see pages 17-18.



The achievements of CRS' RECOLTE project

Catholic Relief Services' USDA-funded RECOLTE project comes to an end in December 2019 after 6 years of activity, including the funding of a gin dedicated to organic cotton. The initial investment has become a seed capital, attracting keen interest from all parties involved in the cotton value chain in Burkina Faso. In fact, a public-private partnership involving the UNPCB, SOFITEX, and the Ministry of Commerce was identified as the best way to make sure this investment has a certain social impact. The buildings will be complete in late August 2019, ginning equipment will arrive in mid-September 2019, and the final delivery of the gin is scheduled for January 2020.

[Find out more](#) ▶

Photo: RECOLTE project organic cotton farmers, Burkina Faso | ©Sam Phelps for CRS

Africa



Ethiopia | 2017/18 organic cotton production



2017/18 saw the first certified organic cotton harvested by the Shelle Mella organic cotton growers co-operative in Southern Ethiopia's Rift Valley.

Since 2013, PAN Ethiopia has trained over 3,500 smallholder farmers from 11 different villages in organic practices. So far, 200 of these farmers - all from the Shelle Mella village - are members of the co-operative and are certified to produce organic cotton.

Another 114 (including 17 women) farmers were set up under two co-operatives in 2019 with a total of 55 ha of land, and are due to gain certification in 2020. The

remaining ~3,000 farmers are not yet in the formalized and registered farm groups required for certification, which is a lengthy process, but the project hopes to gain registration for more of these trained farmers over the coming seasons.

In 2018/19, we can expect organic cotton production from the Shelle Mella cooperative to increase to approximately 131 MT organic fiber as the project matures and more of its production becomes certified and sold as organic.



“ PAN Ethiopia works on pesticide reduction and Farmer Field Schools with partner PAN UK, training 3,727 smallholders to produce organic cotton, of which 200 achieved the country's first organic certification in 2017. Demand for sustainable cotton is growing yet most Ethiopian farmers lack training in agroecological pest management. To help more farmers achieve better cotton yield, quality, and income, we are expanding our proven training programme, to transform cotton supply chains in Ethiopia.



Bazezew Gebre-Mariam

Cotton project coordinator (Arba Minch),
Pesticide Action Nexus Association (PAN Ethiopia)

[Read full Q&A with Bazezew.](#)

Africa



Mali | 2017/18 organic cotton production



The National Federation of Producers of Organic and Fair Farming (FENABE) is currently the only group producing certified organic cotton in Mali following the withdrawal of the Malian Organic Movement (MOBIOM) in 2015/16.

It's important to note that the withdrawal of MOBIOM is still having a big impact. As a result, production volumes remain very low compared to five years ago. Even since 2016/17, the share of Mali's organic certified land being used to grow cotton has reduced from eight to under five percent.

FENABE sells all of its organic cotton through the Malian Textile Development Company (CMDT), which then exports it. Depending on the market situation, CMDT sometimes sells the organic cotton as conventional, highlighting the urgent need to improve market linkages for organic cotton in this region. This is something that the West Africa Organic Fairtrade Cotton Coalition (CCBE) is working on.

A marginal increase in fiber production is anticipated in 2018/19.



“ West Africa, though one of the poorest regions in the world, has very motivated (especially female) farmers and an extensive farming system, which fits very well with organic. The climate is quite positive for cotton cultivating (rainy season, hot temperatures and dry periods). Cotton is a very important cash-crop and could bring additional income, especially if farmers get the Fairtrade price, which is about 30 percent higher than conventional. Through the West Africa Organic Fairtrade Cotton Coalition, we can reach hundreds of thousands of small farming families. West Africa could be ideal to serve European textile production with cotton.



Tobias Meier

Head Sustainable Textile Program,
ecos

[Read full Q&A with Tobias.](#)

[Listen to Tobias' "Out of the Box" interview.](#)

Photo: Organic cotton farmers, Burkina Faso © @CottonDiaries

Africa



Senegal | 2017/18 organic cotton production



In 2017/18, there was just one producer group growing certified organic cotton in Senegal, SODEFITEX, which is owner of the gin and located in the district of Missirah Wadene in the west of the country. SODEFITEX produced 6 MT of organic cotton fiber in 2017/18. Although this represents a 28 percent growth since the previous year, volumes are still significantly lower than they were before Yakaar Niani Wulli (YNW) ceased production in 2015/16 after struggling to find a reliable market for its organic cotton.

However, farmers of both SODEFITEX and YNW are now trying to reorganize

under one initiative. A national coalition has emerged under the leadership of the Federation Nationale des Producteurs de Coton (FNPC). Under this coalition, SODEFITEX will play the triple role of technical advisor to YNW producers (who will return to organic cotton production), buyer, and ginner.

This approach will facilitate the involvement of Senegal's organic cotton farmers in the West Africa Organic Fairtrade Cotton Coalition (CCBE), which will help to provide the support and market linkages needed to successfully sell the organic fiber.

Photo: Fairtrade organic farmer, Senegal | ©Stefan Lechner for Fairtrade International



Africa

Tanzania | 2017/18 organic cotton production



Tanzania had two producer organizations growing organic cotton in 2017/18 - bioRe Tanzania Ltd. and BioSustain – both of which increased their land area under organic cotton. A third group, Alliance Tanzania Ginneries, funded by the C&A Foundation, is in transition to organic, with 1,297 ha in year two of transition. As a result, the organic cotton fiber output of Tanzania is expected to double in 2018/19.

Tanzania is seen as a flag bearer for organic cotton in Africa, with organic cotton making up nine percent of the country's overall cotton output. The country is seen to have high comparative advantage in

organic cotton production.

The government of Tanzania is emphasizing the need to raise productivity in agriculture, as well as promoting value addition and linkages with other sectors. In line with this, government traders and exporters in the cotton sector are putting greater emphasis on organic, which they see as a unique and promising market.

Further, research on the efficacy of homemade organic insecticides, such as solanum incanum, is underway and may be endorsed by the government for use by both organic and non-organic farmers.

Farmer case study: Mr. Athuman Mikuyu

Mr. Athuman Mikuyu is from Kinkungu village in Tanzania's Singida Region. He previously grew conventional cotton and his yield average was 650 MT/ha. Since joining an organic project and receiving training in effective organic agricultural practices, such as IPPM, as well as farm business skills, his practices have improved farming practices and, in the 2017/18 season, his yield reached an impressive 1,325 MT/ha.

[Find out more >](#)



“ In 2019, we expect our organic cotton production to reach 5,400 MT of lint. However, we continue to face the same challenge of securing buyers for all of our organic cotton. C&A Foundation is supporting organic farmers - 8,000 this year, increasing to 12,000 in the near future - to learn good agronomic practices to be able to increase productivity. They also support through farmer business schools, optimization of traceability, marketing of organic cotton, and data management.



Dr. Riyaz Haider

Founder and CEO,
BioSustain Tanzania

Africa

Uganda | 2017/18 organic cotton production*



*Please note that 2016/17 data has been used as a proxy for Uganda this year because 2017/18 data is not ready from source at the time of writing this report.

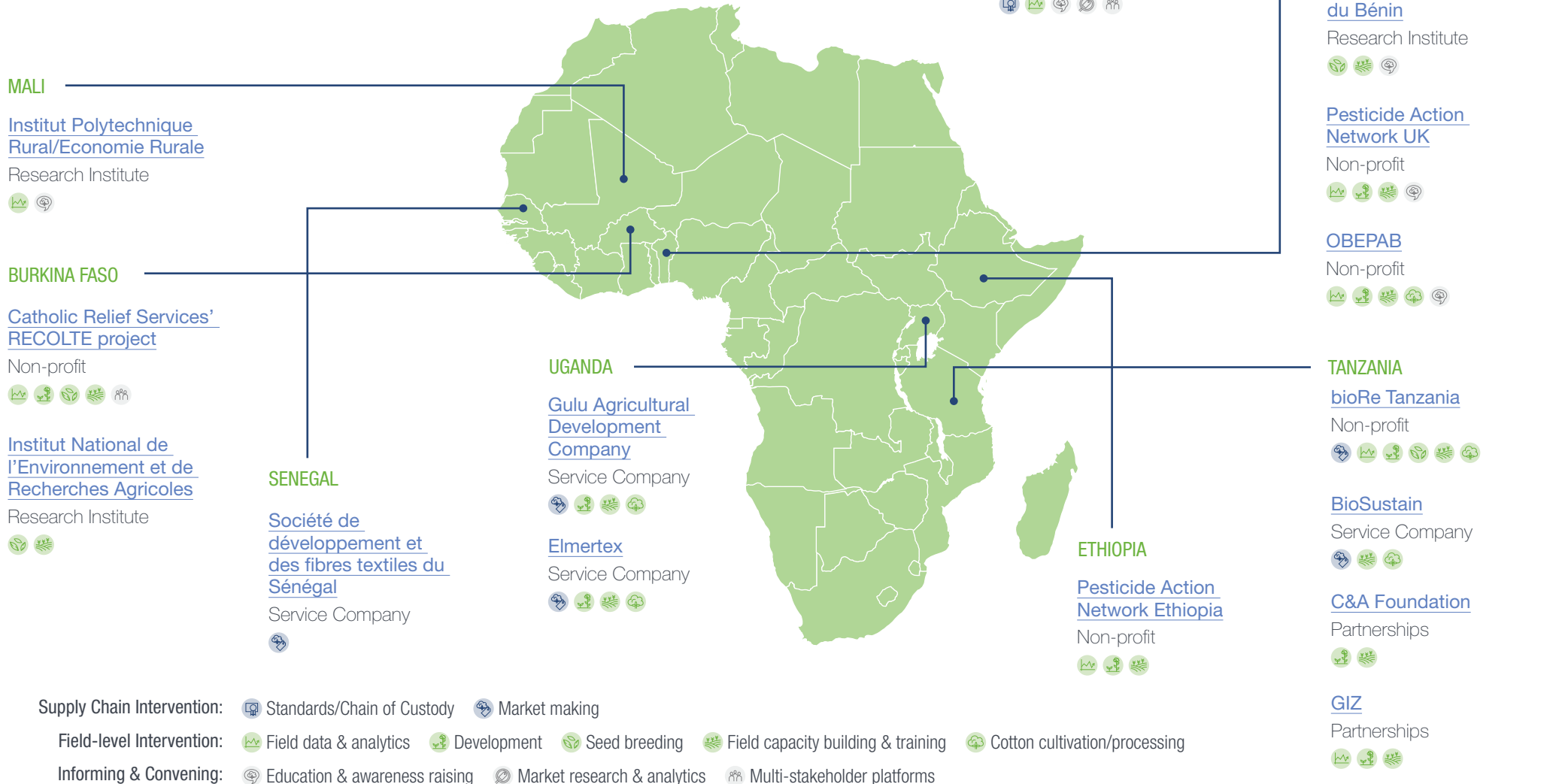
Photos: Organic cotton farmer, Uganda | ©Cotonea



Africa

Stakeholder directory

This map highlights some of the key organizations¹ working to support organic cotton production in Africa.





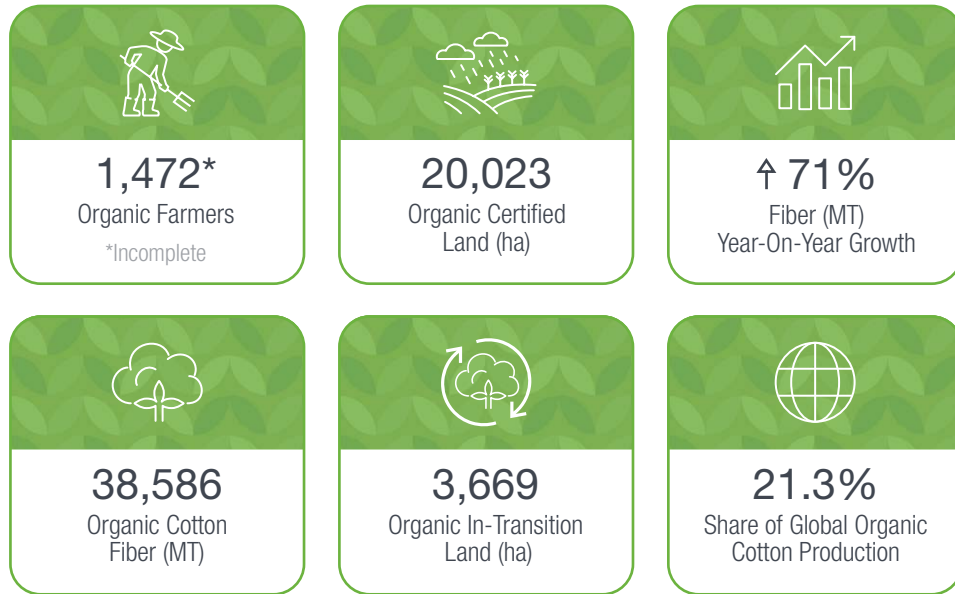
China

Photo: Rare, China

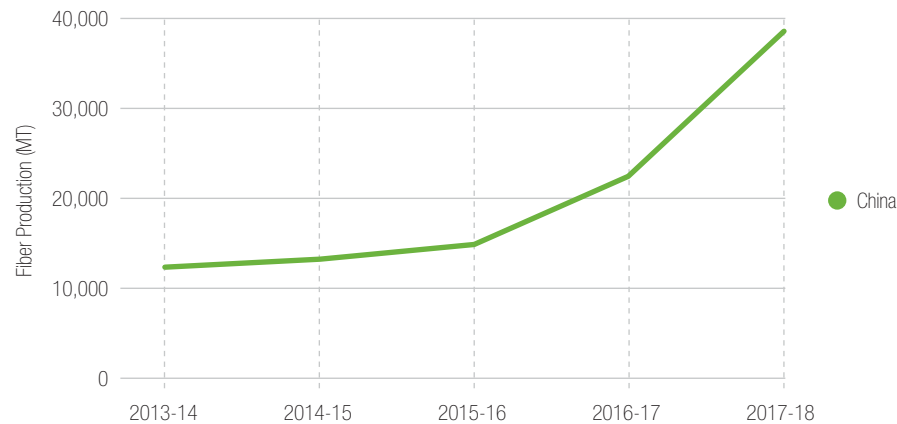
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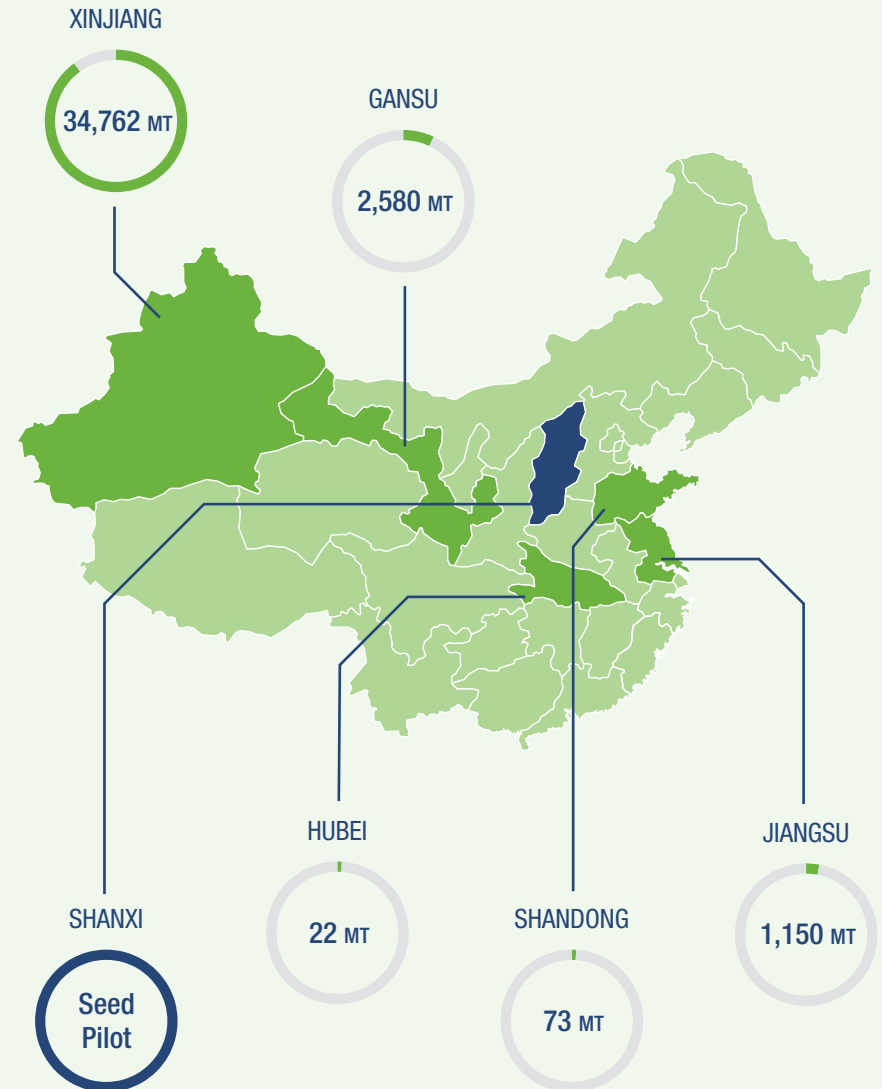
2017/18 organic cotton production



5-YEAR PRODUCTION TREND



REGIONAL PRODUCTION



China

2017/18 organic cotton production



The increase in organic cotton production from 22,448 MT in 2016/17 to 38,586 MT in 2017/18 is, in part, a result of new insights having been gained into the Chinese organic cotton farming landscape. This resulted in a revised method for 2017/18 of estimating overlapping certifications on selected Chinese farms (see [Data Revisions](#) and [2019 Methodology & Disclaimer](#)). This situation is unique to China due to the requirement that all products sold domestically must be certified to China-NOP from farm to final product. With the exception of New Zealand, no other countries have been given mutual recognition status for Chinese certified organic products. For this reason, large scale producers that cater to both the domestic and export markets are in part (not in whole, as previously assumed) dually certified to both China-NOP and one

or more international standards (e.g. EU or US-NOP).

Nevertheless, 2017/18 was a year of growth for organic cotton in China. Almost all producers reported production growth of over 30 percent, and program investments started in 2015 are seeing certified organic cotton produced in Hubei, Shandong, and Xinjiang. New production is also seen in Jiangsu province. Production from these new programs remains relatively small and their scalability will depend on the ability to secure a long-term supply of non-GMO seed, build market linkages, and position the higher price points for Chinese organic cotton. Some producers have made the strategic decision to transition their organic cotton production to extra long staple to address both issues of GMO contamination and price paradox.



Photos: Good Harvest, China (left); Textile Exchange Organic Cotton Round Table, China (right)



First regional Organic Cotton Round Table in China

On March 14, 2019, Textile Exchange and CottonConnect co-organized the first regional Organic Cotton Round Table in China. Responding to industry demand, CottonConnect and Textile Exchange brought together leading industry professionals during the Intertextile Shanghai Apparel and Fabrics Exhibition for an event specifically focused on organic cotton demand and supply in China.

The event was organized as a platform to share knowledge to support participants' strategies to grow organic cotton in China, and as a launching pad for the community to take action. With active engagement of over 45 participants from government, initiatives, farmers, suppliers and (local and international) brands alike, we believe that event was a success for cross-sector pollination of challenges and opportunities.

[Find out more](#) ▶

China

Regional updates



“ Since 2015, Rare has supported 6 farms to transition 3,150 acres of land towards organic cultivation in China, 830 acres of which produced 356 MT of in transition cotton lint in 2018 as part of a program funded by C&A Foundation. Soil forms the foundation of agriculture and the environmental improvement associated with it. So, beyond meeting standards, Rare’s program focuses on helping farmers to understand how their growing practices can improve the soil. [...] In one crop season, soil organic matter and soil organic carbon increased by 15 percent, with three times more beneficial insects than conventional soil, while water usage reduced by 17 percent. [...] Rare now wishes to scale up soil improvement practices at its existing farm partners and at other farms nearby to restore soil health and improve water filtration and soil water holding capacity. Funded by Kering, Rare and South Pole will undertake a carbon insetting feasibility study.



Veronica Yow
Senior Manager,
Rare

[Read full Q&A with Veronica.](#)



Shokay Lab and Rare introduce in-transition cotton collection

In July 2018, Shokay and Rare China announced a new partnership that would make it possible to know how fabrics are produced and where they are sourced – right to the farm. Shokay, a sustainable textile company, would purchase extra-long staple In-Transition Cotton sourced directly from Rare’s farm partners. This collaboration was a natural partnership, as both organizations are passionate about sustainability, traceability, and investing in the future of China.

[Find out more](#) ▶



Photos: Recently collected soil samples indicate promising results on Rare’s farms - shown here from left to right are samples using compost, using chemical fertilizer, and using commercial organic fertilizer | Rare, China (left);

China

Stakeholder directory

This map highlights some of the key organizations¹ working to support organic cotton production in China.

Textile Exchange

Non-profit



C&A Foundation

Non-profit



Rare

Non-profit



CottonConnect

Social Enterprise



Supply Chain Intervention: Standards/Chain of Custody Market making

Field-level Intervention: Field data & analytics Development Seed breeding Field capacity building & training Cotton cultivation/processing

Informing & Convening: Education & awareness raising Market research & analytics Multi-stakeholder platforms

EMENA & Central Asia



Photo: Cottonforlife / UNIDO, Egypt

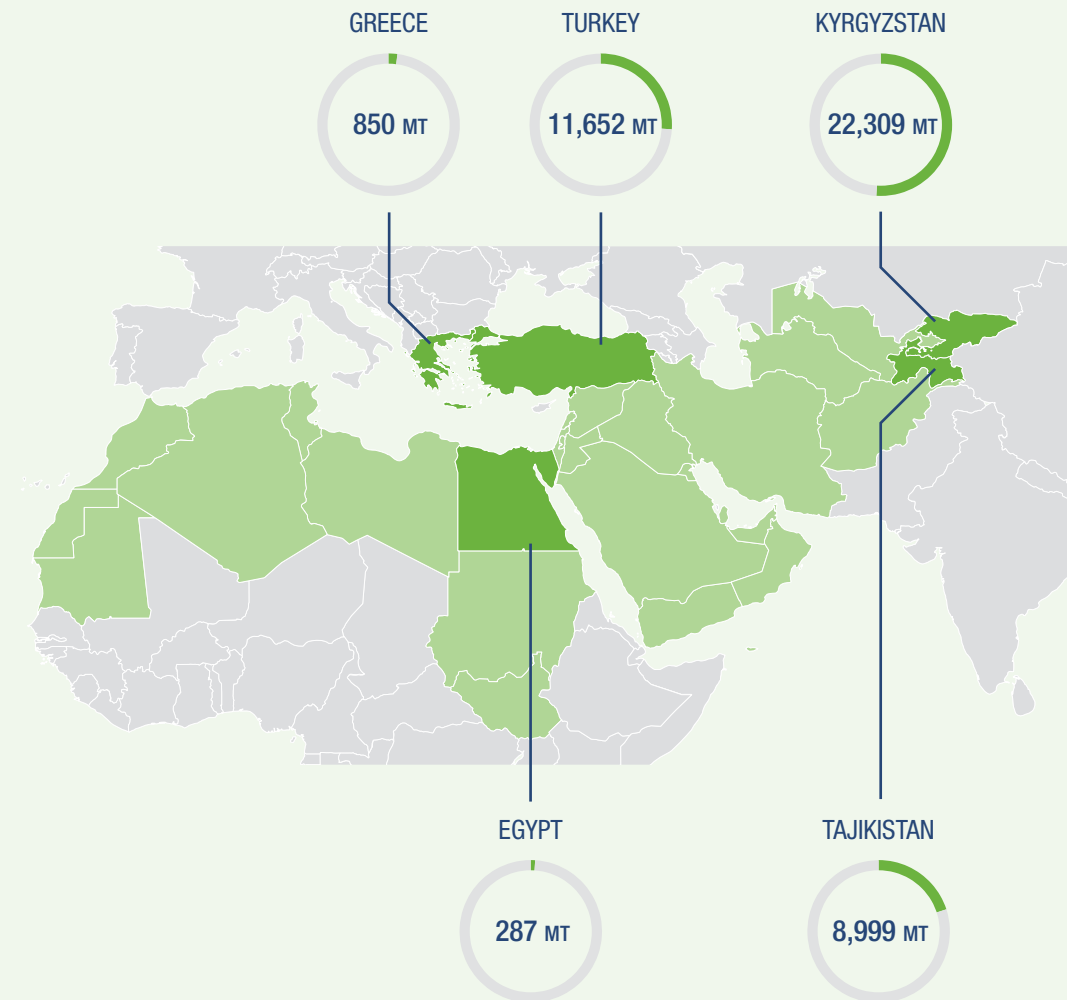
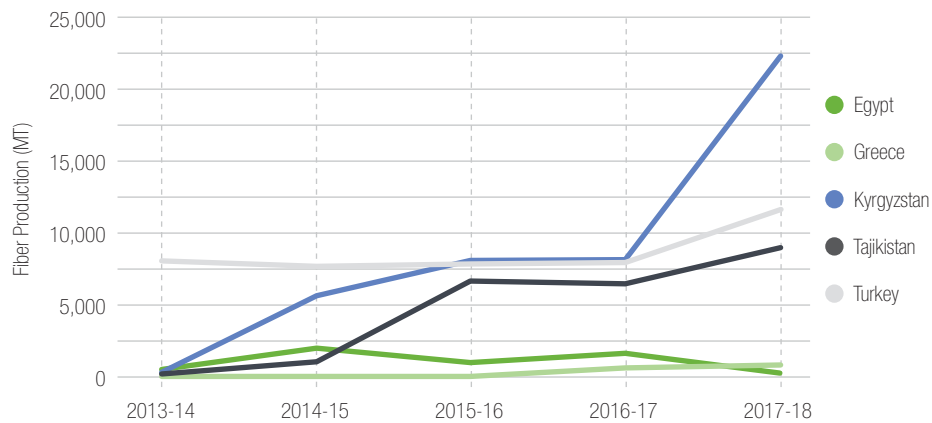
EMENA & Central Asia

2017/18 organic cotton production

REGIONAL PRODUCTION



5-YEAR PRODUCTION TRENDS



EMENA & Central Asia

Regional updates

- Aug 2018** Egypt
SEKEM cooperates with the United Nations Industrial Development Organization (UNIDO) in promoting a sustainable value creation of Egyptian cotton.
- Oct 2018** Turkey
Istanbul Fashion Conference on responsible fashion
- Sep 2018** Central Asia
 Aldi Sud and Aldi Nord commit to a project to support cooperatives in Tajikistan and Kyrgyzstan in sourcing non-GM seed for organic Fairtrade cotton. The project runs from September 2018 to the end of April 2020.

“ Traceability in organic cotton/fabric/garment production has always been a profound challenge. Bossa, one of the largest integrated textile corporations of Turkey, is aware of the challenge and has found a great transparency solution. We are happy to share that we have full transparency in organic production and are ready to share documents with the denim industry. Getting access to information is easy, just scan this QR Code with your smartphone.



V. Besim ÖZEK
Strategy & Business Development Director,
Bossa, Turkey

Photo: SEKEM farmer Rashad during cotton harvest | SEKEM, Egypt



EMENA & Central Asia



Egypt | 2017/18 organic cotton production



Egypt's organic cotton production dropped substantially in 2017/18, from 437 MT the to 287 MT. This is due in part to SEKEM, the pioneer of organic cotton production in Egypt, having stocks of organic cotton left over from the previous harvest, meaning farmers dedicated more land to other crops this year. However, production is anticipated to increase again in 2018/19 to around 359 MT fiber.

A new initiative emerged recently called Cottonforlife, a private sector initiative of FILMAR SpA to support growth of long

and extra-long staple organic cotton in Damietta in partnership with SEKEM. It was last year announced that this project was being scaled up to a national project by the United Nations Industrial Development Organization (UNIDO), working together with the Egyptian ministries of Trade and Industry, and Agriculture.

SEKEM continues to support the Cottonforlife initiative, holding a series of workshops on sustainable cotton cultivation for conventional farmers considering converting to organic.

Photo: SEKEM / NatureTex (left); Cottonforlife / UNIDO (right)

Cottonforlife scales up

UNIDO is scaling up the Cottonforlife Initiative through The Egyptian Cotton Project in coordination with the Egyptian Ministry of Trade and Industry and the Ministry of Agriculture. Cottonforlife is a private sector initiative of FILMAR supporting contracted farmers in Egypt to grow long and ELS organic cotton. The project, together with the Cotton Egypt Association, has created a Private Sector Working Group to increase demand, and the government is supporting the production of organic seed.

[Find out more ▶](#)



NatureTex, SEKEM's company for Organic Cotton Textiles

The company NatureTex for organic cotton textiles is part of the SEKEM Initiative from Egypt that is promoting sustainable development on different levels; in ecology, economy, societal and cultural life. Within this integral context, NatureTex is working with a holistic approach aiming to nurture the nature and supporting human development within its business activities.

[Find out more ▶](#)



EMENA & Central Asia



Greece | 2017/18 organic cotton production



Certified organic cotton is being grown in Greece but is not separated at the gin due to the quantities rarely reaching processing minimums. As such, it is not currently sold as organic cotton fiber on the market but, since it is certified, is still included in Textile Exchange's annual reporting.

However, data for Greece's 2017/18 organic cotton production was not available at the time of writing this report, and 2016/17 volumes have therefore been used as a proxy.

Greece's most important areas for cotton production generally, and where the organic cotton is also grown, are Larissa and Karditsa in the center of the country.

Organic cotton production in Greece is subsidized by the European Union at approximately 500€/ha. The Cotton Committee, organized by the Greek Ministry, is trying to include organic cotton production as part of the Greek Cotton Trademark strategy.

Photo: Cottonforlife, Egypt



EMENA & Central Asia



Kyrgyzstan | 2017/18 organic cotton production



In 2017/18, a total of 22,309 MT certified organic cotton fiber was produced on 14,631 ha by 1,180 farmers. This represents a substantial increase in fiber production of 178 percent compared to the previous year, with land area having tripled.

All of Kyrgyzstan's organic cotton production takes place in the regions of Osh and Jalal-Abad.

Agricultural Commodity and Service Cooperative (ACSC) Bio Farmer was the pioneer of organic and Fairtrade cotton production in Kyrgyzstan, created in Jalal-Abad province in 2007 with support

from Helvetas. Bio Farmer remains very active and the cooperative's organic cotton production continues to grow.

In recent years, a number of new, large-scale organic cotton projects have emerged in Kyrgyzstan, most initiated by Turkish companies.

The country's rate of growth in organic cotton production looks set to continue, with an additional 15,470 MT expected to be transitioned into organic certification over the next three years.

Photo: HELVETAS Swiss Intercooperation, Kyrgyzstan



Stakeholders across the world join forces to increase water productivity

WAPRO is a multi-stakeholder initiative to improve water efficiency in agriculture. First implemented from 2015 to 2018 in four Asian countries, the project now works in 16 countries across Asia and Africa. Working with 22 partners and aspiring to improve the lives of 60,000 farmers, the project offers a holistic push-pull policy approach that encourages water stewardship – collective action towards the sustainable use of water. The focus is on cotton and rice which, together, account for more than 30 percent of irrigation water consumption.

In Kyrgyzstan, WAPRO is working with organic and Fairtrade cotton farmers in selected districts of the Jalal-Abad region. They are conducting several field trials of water-saving methods (such as mulching, enhance crop varieties, intercropping and fertigation), and measuring their impact. In close collaboration with a national water policy project of Helvetas, WAPRO is using the field evidence on water productivity to enrich the national policy dialogue and reforms by the government, ensuring that local communities are equipped with the most adequate legal framework and research to save water.

[Find out more >](#)

EMENA & Central Asia



Tajikistan | 2017/18 organic cotton production



Tajikistan's production of organic cotton fiber grew by 41 percent in 2017/18, reaching 8,999 MT. This fiber is grown on 8,011 ha certified land by 949 farmers. Both of the groups producing organic cotton in the country, Bio-Kishovarz (the longstanding Fairtrade producer group located in Khujand) and a new group that produces organic cotton for Turkish mills, experienced growth rates of between 40 and 50 percent, as land in transition to organic reached certification.

The new producer group accounts for the majority of Tajikistan's organic fiber output, although Bio-Kishovarz has a greater number of farmers, the majority being smallholder, or "Dekhkan," family farmers.

At 8,999 MT, organic fiber accounted for 9 percent of Tajikistan's total cotton production in 2017/18, as per ICAC statistics¹.

Photos: Bio-Kishovarz, Tajikistan

Bio-Kishovarz - Fair and organic cotton in Tajikistan

In 2012, with the initiation of farmers and financial support from Helvetas and GIZ, non-commercial cooperative Bio-Kishovarz was established. Both donors invested in the capacity building of the cooperative, which now manages the organic business independently and is self-sustaining. The cooperative produces more than 1,000 MT of organic and Fairtrade certified cotton every year. About 45 percent of farmers are women who actively participate in Bio-Kishovarz' activities. The cooperative invests Fairtrade premiums received from cotton sales in schools, kindergartens, and other community projects.

[Find out more ▶](#)



EMENA & Central Asia



Turkey | 2017/18 organic cotton production



Turkey's organic cotton production grew substantially in 2017/18, with an increase of 36 percent in farmer numbers, 40 percent in certified land, and 51 percent in fiber - with the latter reaching 11,652 MT, making Turkey the fourth largest producer of organic cotton globally. A further 2,439 ha is in transition to organic.

It's important to note the trend appearing in recent years of Turkish companies producing large volumes of organic cotton in Kyrgyzstan and Tajikistan, almost all of which is brought to Turkey to be processed after ginning.

Also interesting to note is that, while demand for cotton from the textile industry increased over the last 20 years, Turkey's cotton cultivation area almost halved in that time. However, since 2017, the trend has reversed. One of the main reasons for this is that Turkey's Ministry of Food, Agriculture and Livestock changed its support policy against maize and in favor of cotton.

Turkey continues to prohibit GMOs and the Turkish National Cotton Council is promoting its "GMO-Free Turkish Cotton" identity.

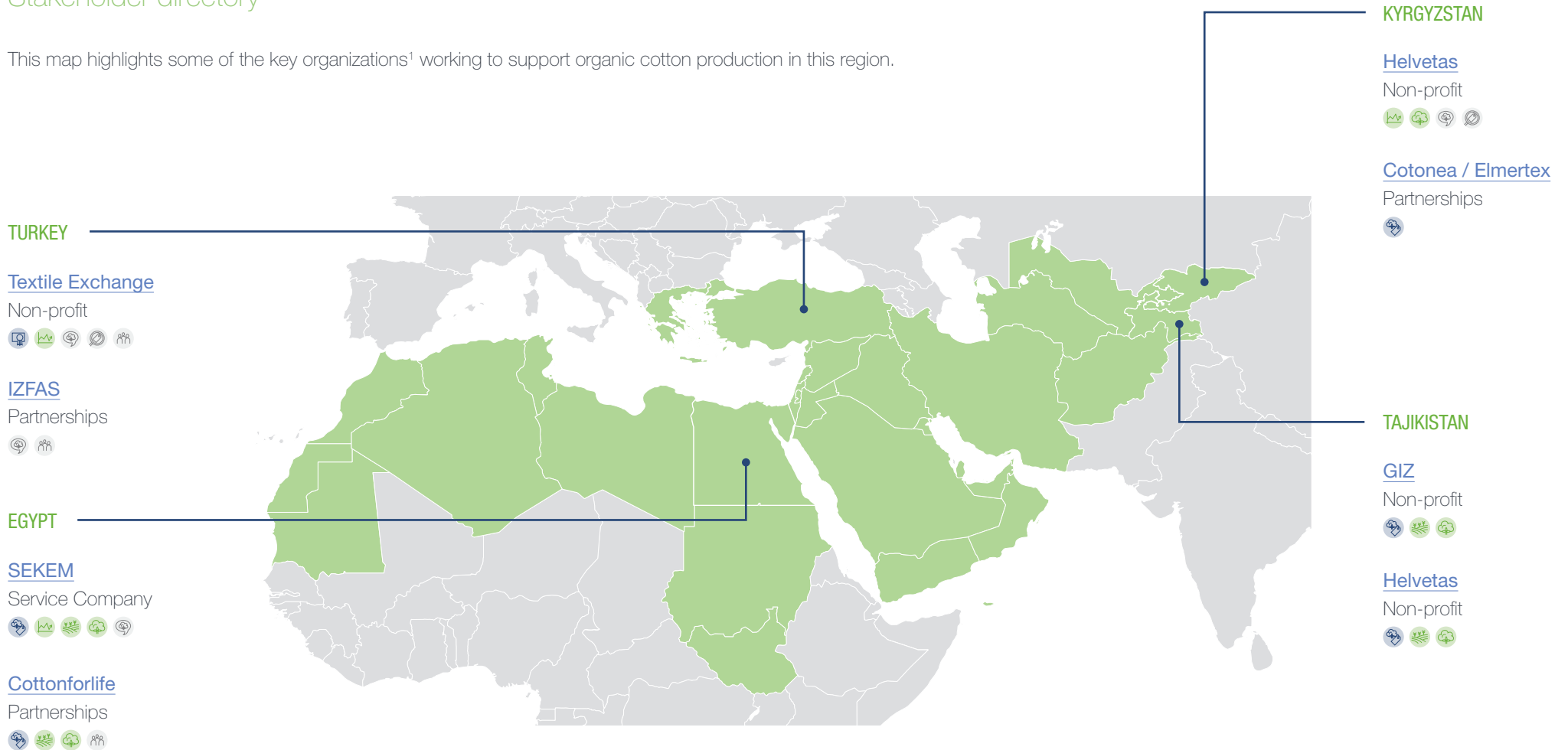
Photo: Egedeniz contracted farmers during [a visit](#) by South African textile company Mungo | ©Tessa Holding for Mungo



EMENA & Central Asia

Stakeholder directory

This map highlights some of the key organizations¹ working to support organic cotton production in this region.



Supply Chain Intervention: [Icon] Standards/Chain of Custody [Icon] Market making

Field-level Intervention: [Icon] Field data & analytics [Icon] Development [Icon] Seed breeding [Icon] Field capacity building & training [Icon] Cotton cultivation/processing

Informing & Convening: [Icon] Education & awareness raising [Icon] Market research & analytics [Icon] Multi-stakeholder platforms



Latin America & the Caribbean

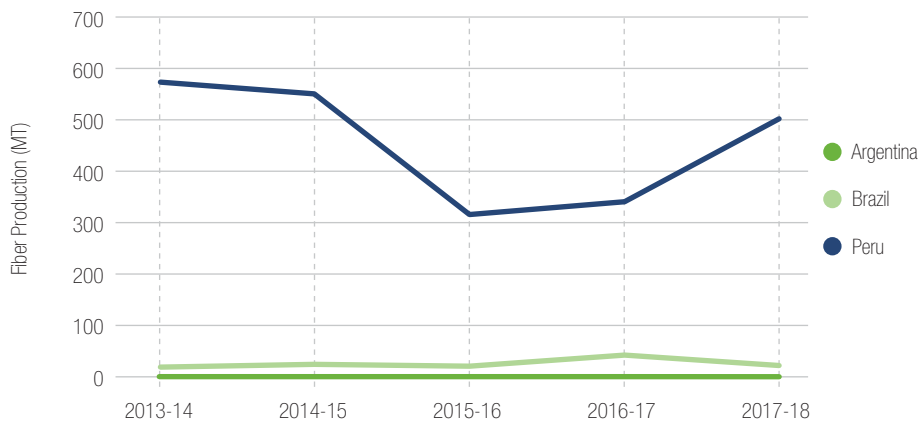
Photo: VEJA, Brazil ©Charlotte Lapalus

Latin America & the Caribbean

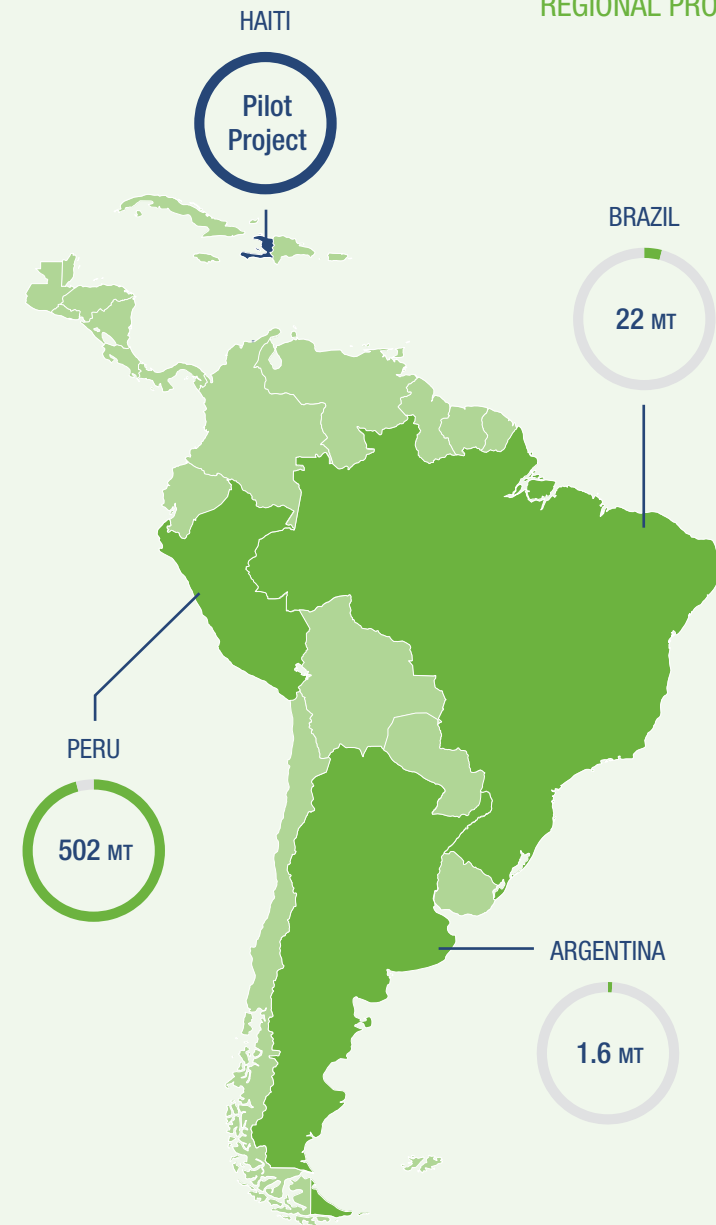
2017/18 organic cotton production



5-YEAR PRODUCTION TRENDS



REGIONAL PRODUCTION



* Please note that 13MT of Brazil's 22MT production total is produced under the Participatory Guarantee System (PGS), rather than third party certification.

Latin America & the Caribbean

Regional updates

- **Jul 2017** São Paulo, Brazil Launch of the Sustainable Fashion Lab
- **Jul 2017** Minas Gerais, Brazil Instituto Lojas Renner launches project to support organic cotton producers in north Minas Gerais.
- **Oct 2017** João Pessoa, Brazil First Organic Cotton Workshop in Paraíba.
- **Nov 2017** São Paulo, Brazil Brazil launches first Eco Fashion Week.
- **Nov 2018** Northeast Brazil C&A Foundation launches project supporting 800+ farmers to produce organic cotton.
- **Feb 2019** Haiti Haiti's first commercial cotton harvest in three decades.
- **Apr 2019** Lima, Perú First Sustainable Fashion Show and Sustainable Fashion Forum at the Perú Moda.
- **Jun 2019** Rio de Janeiro, Brazil First Forum of Sustainable Fashion @ Rio Ethical Fashion.
- **Jun 2019** Bogotá, Colombia Supported by FAO's South-South project, Brazil sends agronomists to help develop organic cotton production in Colombia.
- **Aug 2019** São Paulo, Brazil Sustainable Fashion Lab
- **Sep 2019** Porto Alegre, Brazil 15º Coloquio de Moda
- **Oct 2019** São Paulo, Brazil Forum Fashion Revolution Brazil
- **Nov 2019** São Paulo, Brazil 3º Brasil Eco Fashion Week
- **Apr 2020** Lima, Perú Peru Moda & Peru Moda Deco 2020
- **Jun 2020** Rio de Janeiro, Brazil Rio Ethical Fashion

“ Latin America has a strong textiles sector and a renowned cotton culture. Twenty years back, farmers and the industry were taken by surprise with mass produced apparel from the Far East. Initially they failed to react to it. Nowadays, however, they realize that moving into sustainable apparel will open up new opportunities. The rising importance of speed to market, and the decreasing cost differences to Far Eastern countries, present huge opportunities, especially in penetrating the North American markets with organic cotton clothing. Latin America is still dominated by smallholder farmers, namely organic growers by nature and, according to IFOAM, its area of certified organic land is 2.5 times that of North America.



Alexander Grisar

Founder, Support Organic Cotton in Latin America (SOCiLA)

[Read full Q&A with Alexander.](#)

+Cotton Project - Strengthening the cotton sector through South-South Cooperation

Since 2013, the trilateral South-South Cooperation Project, +Cotton, has sought to strengthen the cotton sector in Latin America and the Caribbean by strengthening diversified and integrated agrifood systems with the recovery of local identity and sustainable cotton production. The project is an initiative between Brazil, FAO, and seven partner countries and involves government, research institutions, academia, and associations. The focus is on technical innovations and sustainable production through improvements in crop management and rotation, resource efficiency, IPM, soil analysis, growth control, and efficient irrigation systems, among others.

[Find out more >](#)

Latin America & the Caribbean



Argentina | 2017/18 organic cotton production



The Chaco region, where Argentinian organic cotton is produced (certified by Letis) was unfortunately affected by floods last season, but the native community was still able to harvest organic cotton. The biodynamic methods employed by the farmers accelerated the restoration of soil and plant health.

The number of farmers increased from 5 to 22 between 2016/17 and 2017/18, while land under organic increased from 2.5 ha to 20 ha, and fiber production from 0.4 to 1.6 MT. This growth is expected to

accelerate in 2018/19, with an estimated 15 MT organic cotton fiber being produced.

However, this is still not sufficient to meet the demand for organic cotton in the region. A lack of investment in the sector means that, although many regional and global brands have revealed plans for sourcing from Latin America, only one (Stay True Organic) is actively supporting organic cotton production in Argentina.

Photos: Stay True Organic, Argentina



“ Wanting to make a change, we decided to grow the first organic cotton certified biodynamic and fair trade with the native community Qom, thus generating a sustainable alternative in Argentina. [...] What inspires me in this work is leaving the planet in a better condition than it is now by looking out for each other. However, the loneliness with which we work on this project in Argentina is a challenge, with a monopolistic industry and a government not supporting organic cotton production or a sustainable textile industry.



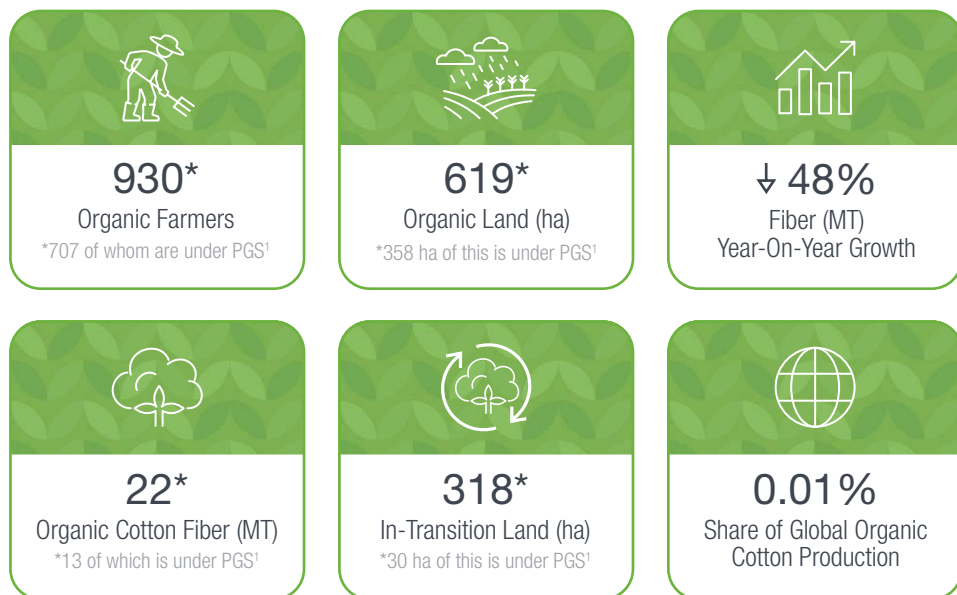
Martin Alonso
Spiritual Director,
Stay True Organic

[Read full Q&A with Martin.](#)

Latin America & the Caribbean



Brazil | 2017/18 organic cotton production



Brazil's organic cotton production was lower than anticipated in 2017/18 due to adverse climate conditions. Although the drought experienced over the previous seven years had receded, many producers were still suffering its affects, leading to a reduced land area planted with organic cotton. At the same time, producers in Mato Grosso do Sul state suffered heavy flooding, resulting in severe crop damage.

The good news is that new projects and production areas are emerging, with 2018/19 looking set to be a record year for organic cotton in Brazil. New projects include "Algodão Paraíba", promoted by

a state governmental organization, and projects led by non-profits such as Instituto C&A.

Demand for organic cotton from Brazil is also increasing, both from existing buyers (such as VEJA, Organic Cotton Colours, Justa Trama and Natural Cotton Color) and from new companies committing to sustainability.

An interesting trend observed in Brazil is a shift towards participatory certification, with roughly 60 percent of land under organic cotton now certified in this way compared to 20 percent the previous year.



C&A Foundation's Sustainable Cotton Program in Brazil

This program is developed mainly in the Caatinga Biome, which historically suffers long droughts and is one of the country's poorest regions. The majority of the population is made up of smallholder subsistence farmers and the lack of public policy, technical capacity and visibility hinders their livelihoods and increases rural exodus. By supporting family organic cotton production, this program aims to foster community resilience, generate income, guarantee food security and promote biome conservation.

[Find out more](#) ▶

Photo: Araripina Community Field Work | ©Tatiana Cardeal for C&A Foundation, Brazil

Latin America & the Caribbean



Brazil | Initiative updates

VEJA: A partnership example from field to store

Since 2004 VEJA has been buying organic cotton coming from agroecological plantations in Northeast of Brazil to produce the twill and canvas used in the company's sneakers. The practices adopted by VEJA and the associations the company buys cotton from aim to increase farmers' income and the well-being of the community, improve soil fertility and biodiversity and to encourage and foster alternative ways of production.

Since its beginning, VEJA has been signing one-year contracts with the associations and setting a market-decorrelated price per kilo of organic cotton. VEJA also pre-finances the harvest up to 50% and pays a premium per kilo of cotton produced that associations must use it to develop community projects.

[Find out more ▶](#)



“ We started to think about growing our cotton project after a 7-year drought devastated the region. We needed a company to support the rebirth of organic cotton but with a big market to reduce risk. [...] We have now an “ Institute Casaca de Couro” with all partner institutions “seated” around a table thinking how to protect the people, the environment, and the development of Caatinga Biome [...]. It is a big challenge, but we are trying to give income, recognition, and gratitude to those planting cotton organically, without pesticides and poisons.



Maysa Gadelha

President,
Coopnatural

[Read full update from Maysa.](#)



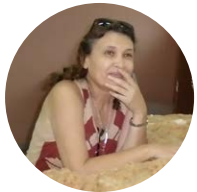
Photos: VEJA (left); Coopnatural (right)

Latin America & the Caribbean



Brazil | Initiative updates

“ With our fashion brand, we innovate to bring added value to the finished product, based on the pillars of sustainability: ecologically correct, socially fair, culturally preserved and economically viable. We use a type of cotton that is naturally coloured. It saves 87.5% of water used during the production process compared to other cotton or textile fibers. We use locally crafted rather than imported fabrics to make our clothes, working with rural settlements and encouraging family farming, as well as participation of women and education in craftsmanship.



Francisca Viera

Founder,
Natural Cotton Color

[Read full Q&A with Francisca.](#)



Photo: Natural Cotton Colour (left); VEJA (right)



Latin America & the Caribbean



Peru | 2017/18 organic cotton production



Following a well-executed plan for a gradual increase in production during the 2017/18 season, Peru's main player in organic cotton, Bergman/Rivera, was able to steadily expand its production of organic cotton. Favorable climate conditions and effective farming practices contributed to the good performance. Production in 2018/19 is expected to remain stable, with a slight increase to 510 MT forecast.

As the largest producer of organic cotton in the region, Peru is striving to meet the growing demand for organic cotton from Latin America. Brands like VEJA, which used to source only from Brazil, found

in Peru a solution to help supplement the volumes needed for their expanding production. Other companies, like Patagonia, are also strategically supporting the transition of cotton fields to organic in Peru. There is an expectation that the area seeded with organic cotton will more than double next season.

Organically grown cotton accounts for 2.3 percent of Peru's overall cotton production. Average organic cotton yield in Peru is 866 kg/ha, which is higher than the national average of 814 kg/ha estimated by ICAC¹.

“ Over the last year, Bergman Rivera has been able to increase the organic cotton production in Peru thanks to the partnerships developed with our clients, who trust our supply chain. Many of these clients have decided to work with organic cotton in transition since 2018 in order to contribute to the growth of the organic farming area. Having a market for organic cotton in transition represents a benefit for the farmers that used to sell that cotton as conventional and now can sell it at better prices.



Orlando Rivera
General Manager,
Bergman Rivera

[Read full Q&A with Orlando.](#)

“ We believe that the industry has to face the real needs of the new demand for sustainable fabrics made on a small scale. Everyday entrepreneurs can now become new players in the fashion industry, with social media channels giving them a chance to face the market with lower costs. There's no longer a need for a physical shop in order to be visible in this new growing market of customers who are tired of the global offer that is the same found on the streets worldwide.



Santi Mallorqui
CEO,
Organic Cotton Colours, SL

[Read full Q&A with Santi.](#)

Latin America & the Caribbean



Haiti | Pilot program

Although not yet certified organic, a significant new project is underway in Haiti to re-introduce cotton growing to the country using organic agricultural practices. The project is led by the Smallholder Farmers Alliance (SFA) with support from the Impact Farming Foundation and in partnership with Timberland.

SFA farmer members harvested the first commercial cotton crop in over 30 years in January 2019, marking the formal return of

what was once the country's fourth largest agricultural export.

In July 2019, 530 SFA smallholder farmers planted the second crop, which will yield an estimated 136 MT of ginned fiber when harvested in January 2020. This will be produced under organic principles but not yet be certified organic.

Over the course of the next five years, the goal is to reach 5,000 MT a year of ginned organic cotton.



Photos: Smallholder Farmers Alliance / Timberland, Haiti



“Tree currency” supports Haiti’s return to cotton growing

Cotton’s return to Haiti began with trees. Specifically, more than five million trees planted in five years by members of the Smallholder Farmers Alliance (SFA) through sponsorship from global outdoor lifestyle brand Timberland. Some years later, Timberland wanted to explore how it could become a client, and this led to the SFA planting the first commercial cotton crop in summer 2018.

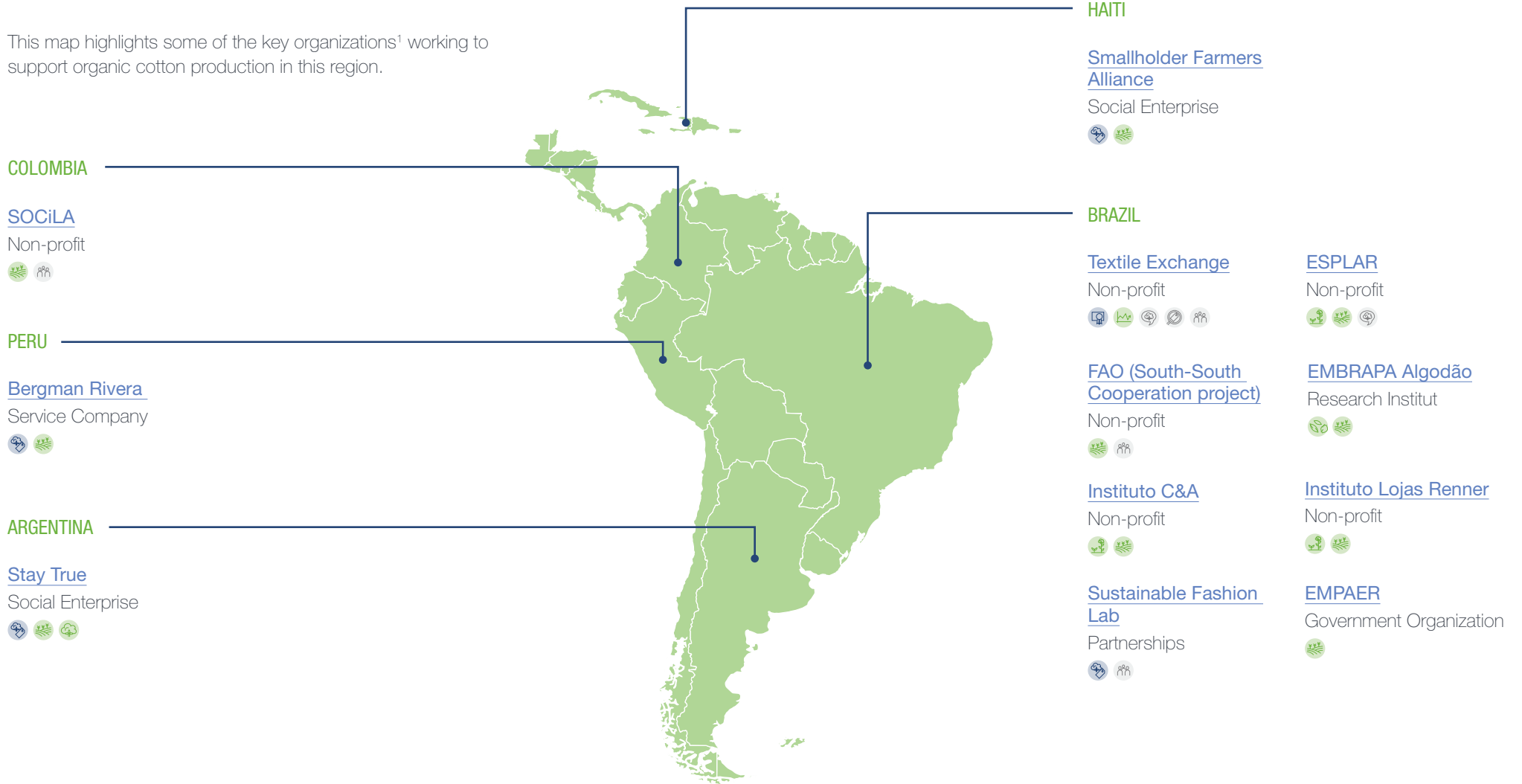
The tree connection continues. Each smallholder growing cotton earns credits by planting trees. These credits, also known as tree currency, earn farmers cotton and other seeds, tools and agricultural training.

[Find out more >](#)

Latin America & the Caribbean

Stakeholder directory

This map highlights some of the key organizations¹ working to support organic cotton production in this region.



Supply Chain Intervention: Standards/Chain of Custody Market making

Field-level Intervention: Field data & analytics Development Seed breeding Field capacity building & training Cotton cultivation/processing

Informing & Convening: Education & awareness raising Market research & analytics Multi-stakeholder platforms



South & Southeast Asia

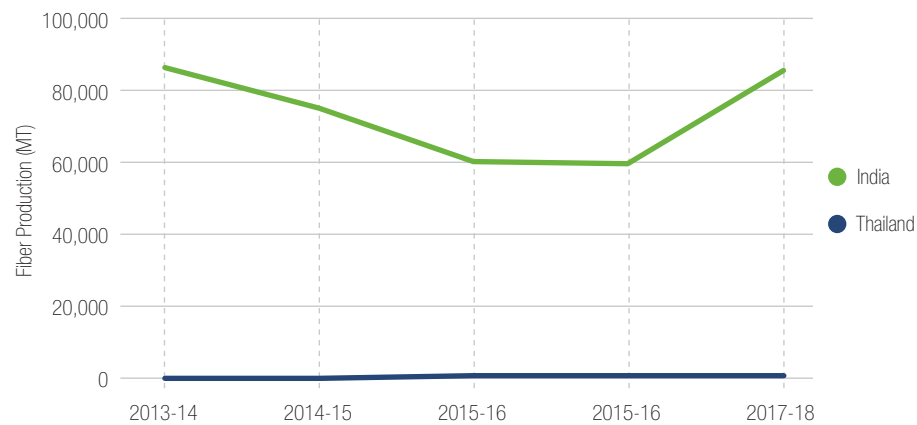
Photo: Dinesh Khanna for C&A Foundation, India

South & Southeast Asia

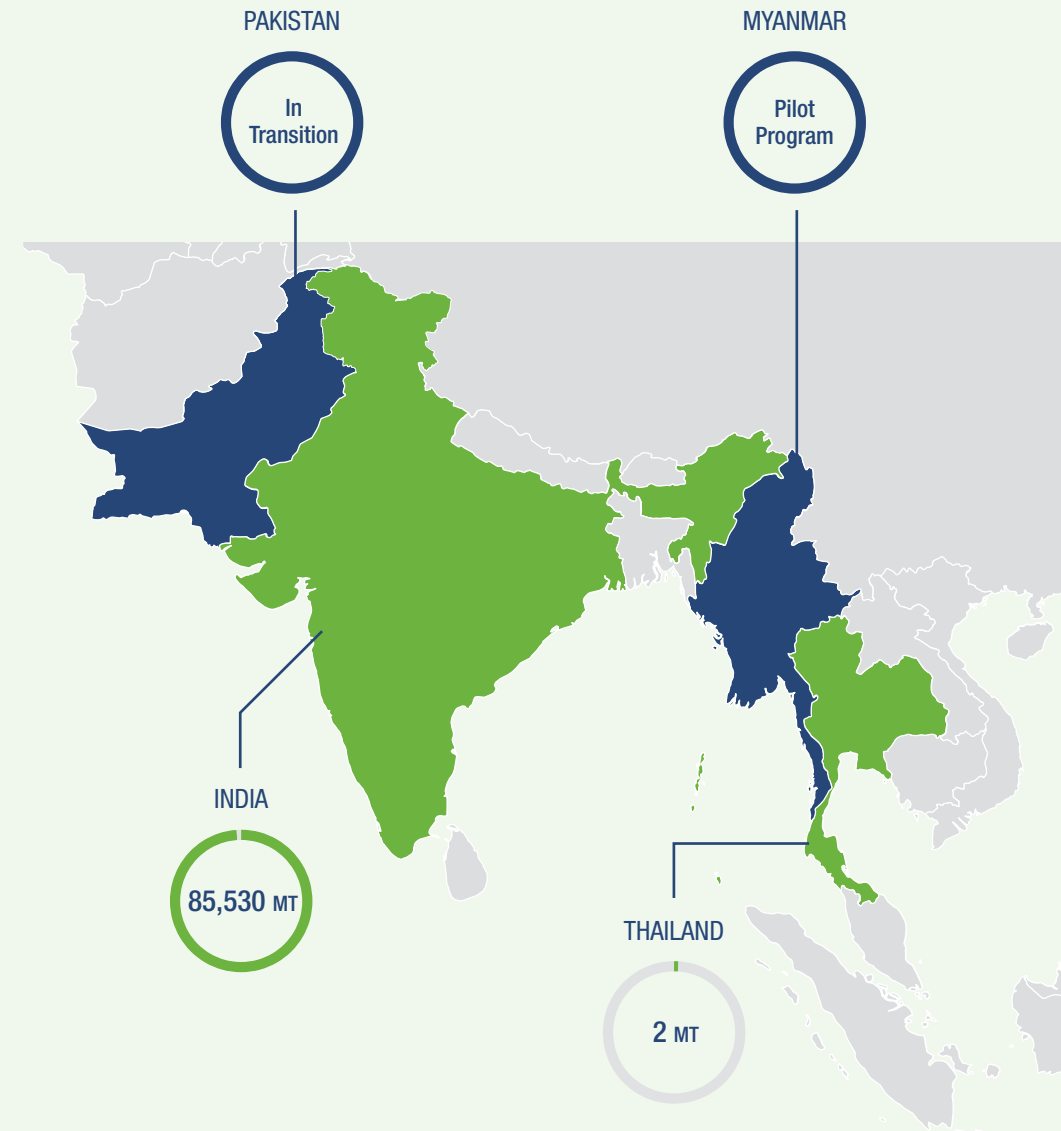
2017/18 organic cotton production



5-YEAR PRODUCTION TRENDS



REGIONAL PRODUCTION



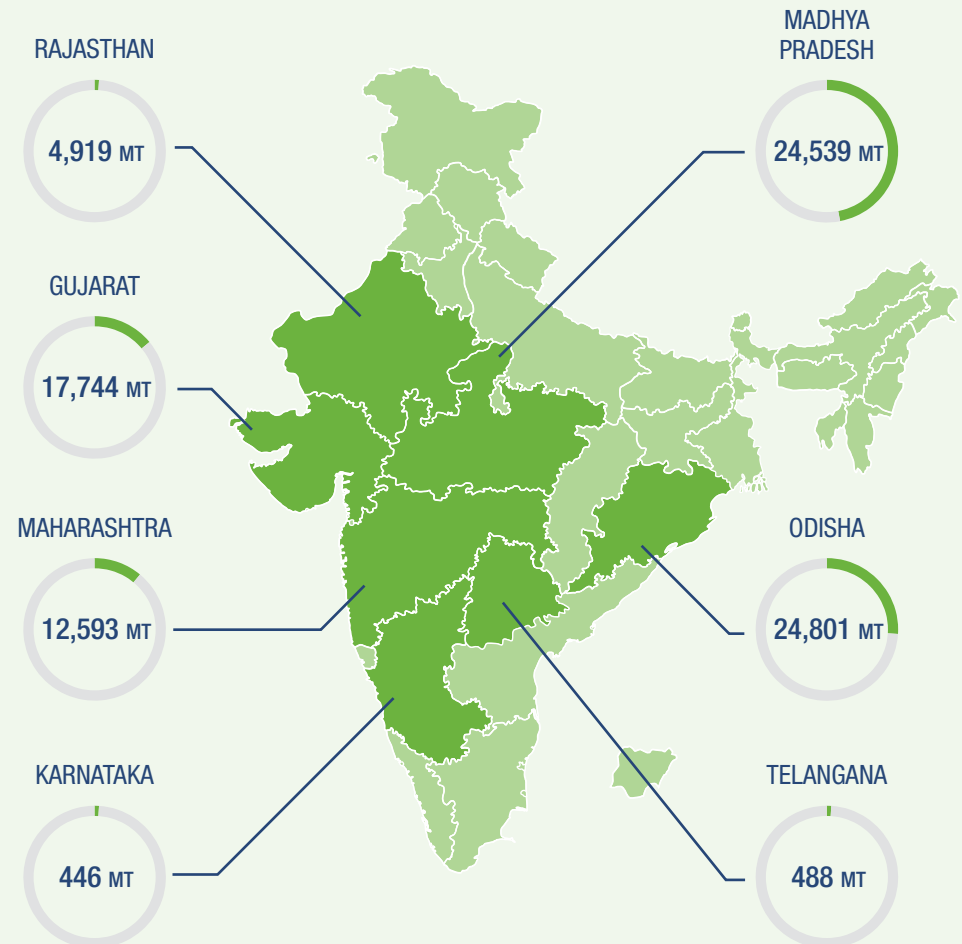
* Please note that organic cotton in Thailand is produced under the Participatory Guarantee System (PGS), rather than third party certification.

South & Southeast Asia

Regional updates

- May 2018** Bhopal, Madhya Pradesh, India C&A Foundation and the government of Madhya Pradesh host Cotton Trailblazers, a celebration of the state's leadership in organic cotton and of the role this fiber plays in improving rural livelihoods in India.
- May 2018** Bhopal, Madhya Pradesh, India OCA hosts first Organic Cotton Summit, attracting notable speakers from the sector and emerging talent to discuss the future of organic cotton.
- Feb 2019** Sadiqabad, Pakistan WWF-Pakistan and Directorate of Agriculture Extension, Baluchistan celebrate the certification of Pakistan's first organic cotton bale.
- Mar 2019** Nagpur, Maharashtra, India C&A Foundation host event to launch the Maharashtra chapter of the Organic & Fairtrade Cotton Secretariat
- Jun 2019** Bhopal, Madhya Pradesh, India C&A Foundation, in collaboration with the Consulate General of the Netherlands, India host 'From Sustainable Towards Organic Cotton' roundtable.
- Aug 2019** Mumbai, Maharashtra, India Union Textile Minister launches Project SU.RE on Sustainable Fashion Day at Lakme Fashion Week, the country's biggest commitment yet to move towards sustainable fashion.
- Aug 2019** Mumbai, Maharashtra, India 'Cotton Champions: Farmers' session held on Sustainable Fashion Day at Lakme Fashion Week, where organic cotton farmers spoke about the socio-economic and environmental case for organic.
- Dec 2019** Nagpur, Maharashtra, India OCA to host Organic Cotton Summit. OCA, C&A Foundation and Solidaridad Asia will host a series of events as part of this.
- 2018- 19** Nagpur, Maharashtra, India OCA deploys operations in research stations and on-farm trials in six Indian states as part of its 'Seeding the Green Future (SGF) with FiBL.

INDIA PRODUCTION BY STATE



South & Southeast Asia

India | 2017/18 organic cotton production



In 2017/18, over one million farmers in India were certified under NPOP, including 1,918 individual producers and 3,488 Internal Control Systems (ICS)¹. Of these, 141,421 farmers grew organic or in-transition cotton, spread between 34 producer groups and 354 ICS. This represents a drop in farmer numbers compared to the previous year ICS growing organic cotton. Total certified land area also dropped (although Telangana, Odisha, Rajasthan and Karnataka all experienced an increase).

Despite this, India's total fiber production certified under NPOP reached 85,530 MT

(240,026 MT seed cotton) in 2017/18, representing a considerable increase of 44 percent compared to the previous year.

This is largely due to an increase from 45 to 70 percent in the proportion of certified land area that each farmer dedicated to growing cotton (as opposed to other organic crops). In addition, average yield for cotton among organic farmers was 549 kg/ha. This compares to the average yield of 519 kg/ha among conventional cotton farmers in India, as estimated by ICAC for 2017/18².

Looking at state-level trends we see that Madhya Pradesh, previously the largest contributor to India's organic cotton output, experienced a 12 percent drop in production in 2017/18. At the same time, Odisha experienced a 63 percent increase, putting Odisha (at 24,801 MT) just ahead of Madhya Pradesh (at 24,539 MT) in terms of state-level organic fiber production in 2017/18. Madhya Pradesh continues to have the largest total land area certified under NPOP.

Following Odisha and Madhya Pradesh, which each accounted for 29 percent of India's total organic production in 2017/18, are Gujarat with 17,744 MT (21 percent of national production), Maharashtra with 12,593 MT (15 percent), Rajasthan with 4,919 MT (six percent), Telangana with 488 MT (one percent), and Karnataka with 446 MT (one percent).

In terms of growth rates, Rajasthan experienced the highest growth in organic fiber production (967 percent) followed by Telangana (182 percent), Gujarat (108 percent), Maharashtra (87 percent), Odisha (63 percent), and Karnataka (13 percent).

It is projected that India's total organic fiber production will continue to grow over the next few years, reaching an approximated 125,000 MT by 2018/19. This is partly a result of the 25,237 ha currently in-transition to organic reaching certification.



Photo: Pre-Organic Cotton / ITOCHU, India

1. "An Internal Control System is the part of a documented quality assurance system that allows an external certification body to delegate the periodical inspection of individual group members to an identified body or unit within the certified operator. This means that the third-party certification bodies only have to inspect the well-functioning of the system, as well as to perform a few spot-check re-inspections of individual smallholders" [IFOAM - Organics International].
 2. ICAC, 2019. World Cotton Statistics: A Report by the Secretariat of the International Cotton Advisory Committee.

South & Southeast Asia

India | Initiative updates

Fairtrade supports non GM seed development

With access to non-GM cotton seed identified as a challenge for Fairtrade farmers, Fairtrade has been supporting and building on the work carried out by Pratibha in this space in a three-year project funded by Traid and in partnership with Vasudha cooperative and PSL. The objective of the project is to develop new non-GM cotton hybrids, commercially produce them, and make them available to farmers. In phase II, the aim is to continue research, commercial seed production and develop new parent lines. Out of the project's current eight acres, five are being contributed by five Fairtrade farmers, who are being trained on seed variety selection and multiplication. Approximately 1,000 seed packets were sold to farmers last season and the aim is to increase this by 500 percent over the next few years.



Seeding the Green Future

OCA's investment in 'Seeding the Green Future' breeding program in India has led to significant growth, with the deployment of operations in research stations and on-farm trials in six Indian states during 2018-19. Led by FiBL, a growing number of local partners have trained over 1,000 farmers in cultivar evaluation and seed multiplication, and hosted 84 trainings in professional breeding and cultivar development and selection to strengthen the development and multiplication capacity of organic cotton seed locally.



[Find out more ▶](#)



bioRe® in India initiated the organic cotton cultivar evaluation research in 2010/11 and is evaluating more than 70 genotypes per year under organic situations on both light and heavy soils, and with various irrigation facilities. In 2019, we achieved the release of six of bioRe®'s own GM-free cotton seeds. Four hybrids and two varieties are available for organic farmers and propagation is ongoing for the next season. Interested farmers and organisations may order GM-free seeds from bioRe® between February and April 2020 at 70 percent pre-payment and receive the seeds by April 2021. The bioRe® cotton cultivar evaluation research in India is carried out in collaboration with senior cotton breeder Dr. S.S. Patil and the University of Agricultural Sciences Dharward, and initially (until 2017) with FiBL, the research institute of organic agriculture. The bioRe® cotton cultivar evaluation programme is financially supported by Coop Switzerland. One important component of the research is on GM-free seeds that are drought-resistant and also stay-green lines, which are promoted under the international programme WAPRO on water productivity supported by SDC and Helvetas. Under the quality label bioRe® Sustainable Textiles, the products made from bioRe® organic cotton are successfully sold in the market.



Christa Suter
CEO,
bioRe Foundation



Photo: Single plant selection | Seeding the Green Future, India

South & Southeast Asia



India | Initiative updates

“ To address the sustainability issues in cotton farming in Maharashtra, India, Solidaridad is establishing an organic cotton hotspot in Maharashtra, enabling 15,000 farmers to shift to organic farming. In year one, we focused on training 1,000 farmers on organic farming practices, setting up women-led community seed banks, mapping existing non-GM seed production programmes, and establishing partnerships with State Agriculture Universities on seed development. We are now in year two and training 4,000 more farmers on organic farming while we continue to work to improve input supplies, including non-GM seed.



Isabelle Roger
Senior Manager,
Solidaridad Network

[Read full Q&A with Isabelle.](#)



CottonConnect, Volcom & Kering partner on FarmToYarn Initiative

CottonConnect has worked with Kering since 2015, providing agronomic, social and business training for farmers in organic cotton programs. Volcom, a modern lifestyle brand in the Kering Group, was seeking to increase the amount of organic cotton used in its products. Thus, the FarmToYarn initiative was started in 2017 in partnership with Volcom & supported by Kering's Organic Cotton Platform (OCP), which aims to increase the amount of organic cotton being used in their brands' supply chains. The FarmToYarn initiative works on capacity building programs for certified organic farmers in Madhya Pradesh and Maharashtra in India.

[Find out more ▶](#)



Photos: RESET, India (left); Volcom, India (right)



RESET: Regenerate the Environment, Society and Economy through Textiles

RESET is implemented by Grameena Vikas Kendram Society for Rural Development, an NGO-social enterprise hybrid working for sustainable rural development causes in India. In 2018/19, RESET worked with 235 farmers in 27 villages. Farmers managed pests using locally prepared, plant-based concoctions like neem, custard apple, and Calotropis. The cost of cultivation in the RESET farms has come down by 50 percent and the best practitioners scored up to 70 percent reduction (excluding seed cost).

[Find out more ▶](#)

South & Southeast Asia

India | Initiative updates



ChetCo: Pioneers in sustainable cotton collaboration

This year, the Chetna Coalition (ChetCo) has made strides to become a replicable model for smart, collaborative pull-markets for sustainable & regenerative agriculture. Towards this goal, the organization is working on two fronts: 1) diversifying its portfolio of marketed crops to include a host of food crops in order to support the full organic farming systems of farmers; 2) working on a financial facility to generate adequate working capital flows to cooperatives who do not have sufficient collateral for traditional back loans.

In addition to these efforts, ChetCo has announced that, with the capacity to track finished goods all the way down to individual farmers, it now has one of the most traceable and transparent textile supply chain in the world. ChetCo is also proud to have this season provided pre-financing for 10,000 acres of organic cotton.

[Read full update on ChetCo's work](#) ▶



Photos: Pre-Organic Cotton / ITOCHU, India



“ Cotton farming was originally organic; however, science and technology changed it dramatically with genetically modified seed and agricultural chemicals including pesticides. This development changed farming methods a lot. We cannot go back to the original farming method, but we are trying to promote how important it is to expand the global organic cotton market, establish a sustainable textile industry and protect people who are suffering from harmful agricultural chemicals. To make this happen, ITOCHU Corporation will collaborate in organic cotton and POC with retail brands, promoting to retailers and consumers how fashionable it is.



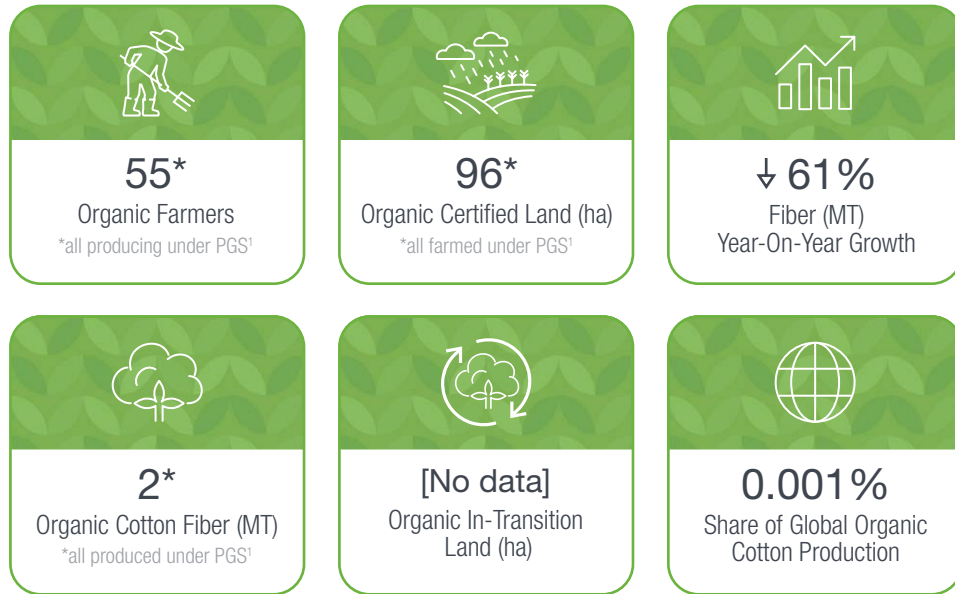
Nobuyasu Nakamura
Sales specialist,
ITOCHU Corporation

[Read full Q&A with Nobuyasu.](#)

South & Southeast Asia



Thailand | 2017/18 organic cotton production



Green Net Cooperative is the only known producer of organic cotton in Thailand. It uses the Participatory Guarantee System¹ (PGS), rather than third party certification.

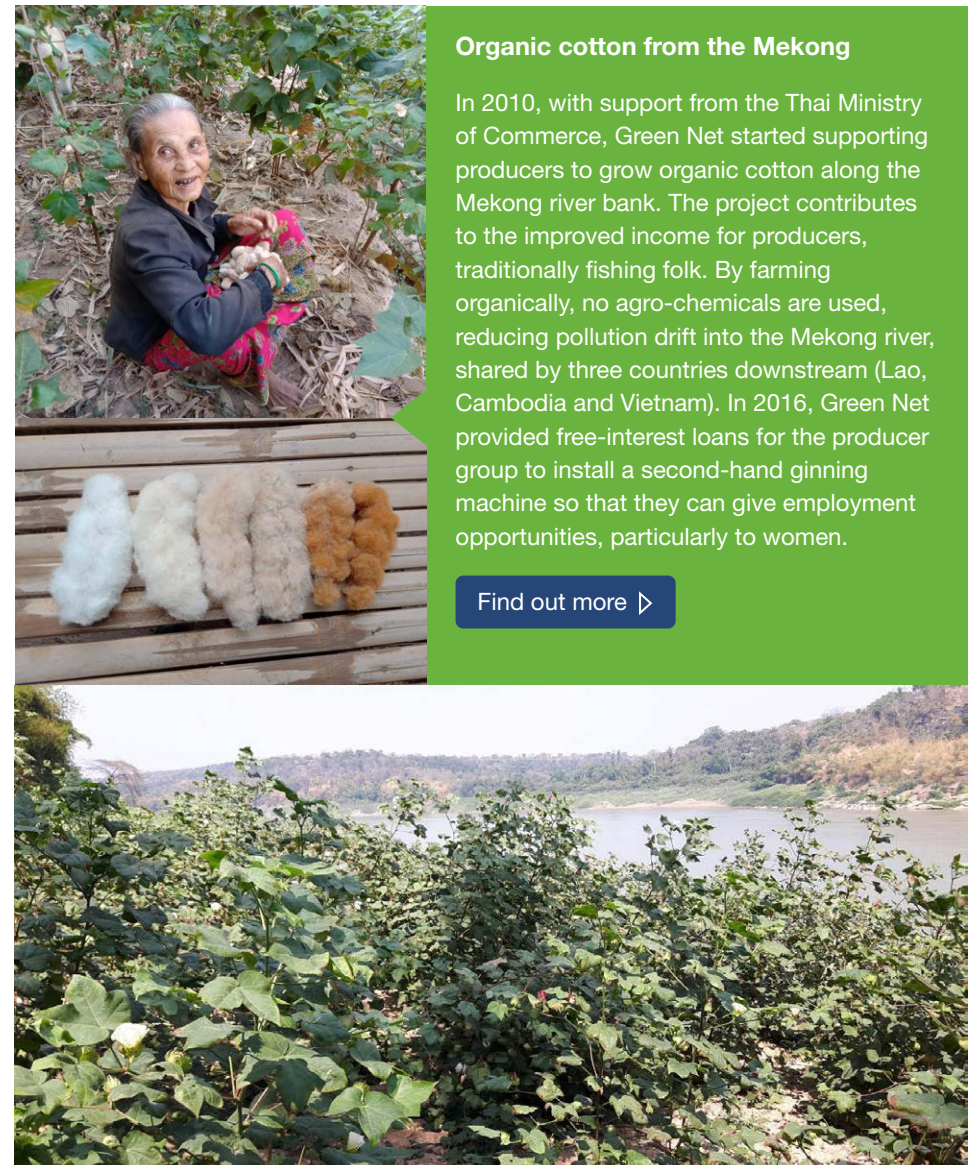
Early efforts to produce organic cotton by Green Net began in 2000, with a focus on producing handmade, naturally dyed textiles with local patterns. However, the market for this was not ready for organic cotton and so production went on hold.

In 2010, with support from the Thai Ministry of Commerce, Green Net initiated a second trial to produce organic cotton, this time with the focus shifted to producing more

modern textile products such as T-shirts. Following the record-high yields achieved by Green Net's farmers last year as a result of optimal climate conditions, production reduced in 2017/18 as the conditions were less favorable.

Though a small-scale project, 55 traditional fishing families benefit from the additional income bought in by growing organic cotton on their small, riverside plots of land. Thanks to the organic and Fairtrade scheme introduced by Green Net, farmers receive a good price for their cotton.

Photos: Mekong organic cotton | Green Net, Thailand



Organic cotton from the Mekong

In 2010, with support from the Thai Ministry of Commerce, Green Net started supporting producers to grow organic cotton along the Mekong river bank. The project contributes to the improved income for producers, traditionally fishing folk. By farming organically, no agro-chemicals are used, reducing pollution drift into the Mekong river, shared by three countries downstream (Lao, Cambodia and Vietnam). In 2016, Green Net provided free-interest loans for the producer group to install a second-hand ginning machine so that they can give employment opportunities, particularly to women.

[Find out more ▶](#)

South & Southeast Asia

Myanmar | Pilot program



Although not yet certified, promising seed trials are underway in Myanmar.



Photos: Botanical making (left); female farmers (right) | Pure Sense Organics, Myanmar

New organic cotton project underway in Myanmar

Welspun India Ltd. & Sense Organics Import & Trading GmbH have entered into a JV partnership for the first organic cotton farming project in Myanmar through Pure Sense Organics Myanmar Ltd. In 2018/19, the program engaged 13 farmers in the Mandalay region of Myanmar, with 8 ha in transition to organic. By 2019/20, this will grow to 75 farmers with 300 ha of land, growing organic cotton on 65 ha. Rotational crops common in the region include black gram, green gram, sesame, groundnut, pigeon pea, and onion.

An expansion phase is planned for 2020/21 in which over 400 ha will transition into organic certification. A stronger focus on social compliance and potential Fairtrade certification will also be explored. The project's Farm Extension team is using the Source Trace app to record, on a real-time basis, project details, audit area, farm profit and loss, and other documentation required for organic certification.

One non-GM seed variety has been registered with the Ministry of Agriculture and Irrigation in April 2019. A further three varieties are being trialed on government farms and will undergo certification in 2019/20. The program is also piloting the use of AgriRain, a precision irrigation system, with 243 ha planned to utilize this system by 2020/21.



South & Southeast Asia



Pakistan | In-transition

There was no certified production of organic cotton in Pakistan during the reporting year of 2017/18, but there were 786 ha in transition to organic.

Next reporting year (2018/19) will see Pakistan's first harvest of certified organic

cotton. In total, it is estimated that around 500 MT organic seed cotton will be harvested by various projects.

Read here and overleaf about some of Pakistan's organic cotton initiatives.



Farmers of hope; RBDC's organic cotton initiative

Pakistan's Rural Business Development Centre (RBDC) was struggling to initiate organic cotton in Pakistan. In the pursuit, farmers faced serious challenges in finding non-GM cottonseed. RBDC, together with the Government of Punjab, tested some local non-GM varieties in rain-fed areas of Pothohar, Punjab. Results were encouraging and, this year, 422 farmers decided to sow 586 acres of cotton under organic practices. Though fertiliser and pesticides were not used on these fields for many years, it is not yet certified organic. RBDC is in process of arranging group certification.



[Find out more ▶](#)

A step towards green Pakistan; Pakistan goes organic

Recognizing the potential for change in the Pakistani cotton industry, C&A Foundation and WWF Pakistan collaborated in 2015 to take the lead in developing the country's first large scale organic cotton production program. Together with their partner, the Government of Balochistan's Agriculture Extension Department, 4,000 resource poor and marginalized farmers were successfully enrolled in a rigorous training and certification process in three districts of Balochistan; Sibi, Barkhan and Lasbella with the aim of creating a sustainable organic cotton farming industry. Pakistan's first organic cotton bale was harvested in Balochistan during the 2018-19 cotton season, with 2,000 bales of organic cotton procured by a local supplier of leading brands.

[Find out more ▶](#)



Photos: RBDC Pakistan (left); First organic cotton bale ceremony in 2019 | WWF Pakistan (right)

South & Southeast Asia

Pakistan | Initiative updates



“ Our biggest achievement over the last year was getting our first audit results, giving confidence to our team following tireless efforts made to grow organic cotton. This gave us the opportunity to present our work to a global audience in Milan during Textile Exchange’s 2018 Organic Cotton Round Table. Our success is down to our focus on first growing / developing enough non-GMO seed on our pilot farms for the next phase. We have a clear plan to increase our area under certification gradually with self-dependency for non-GMO seed. We’ve downsized the project as per our limited resources this year but of course, after finding a likeminded funding partner, we will up-scale the project to continue with our original plans.



Imran Asghar
Head of Sustainable Raw Materials,
SIA Foundation Pakistan

[Read full Q&A with Imran.](#)

[Find out more about SIA Foundation.](#)



Photos: SIA Foundation Pakistan



South & Southeast Asia

Stakeholder directory

This map highlights some of the key organizations¹ working to support organic cotton production in this region.

PAKISTAN

[C&A Foundation](#)

Non-profit



[WWF Pakistan](#)

Non-profit



[RBDC](#)

Service Company



[SIA Foundation](#)

Non-profit



MYANMAR

[Pure Sense Organics](#)

Service Company



THAILAND

[Green Net Cooperative](#)

Non-profit



INDIA

[Textile Exchange](#)

Non-profit



[Organic & Fair Cotton Secretariat](#)

Partnerships



[Organic Cotton Accelerator](#)

Non-profit



[CottonConnect](#)

Social Enterprise



[bioRe India](#)

Non-profit



[Solidaridad Network](#)

Non-profit



[Chetna Organic Farmers Association](#)

Non-profit



[Chetna Coalition](#)

Partnerships



[C&A Foundation](#)

Non-profit



[APEDA](#)

Governmental Organization



[Pre-Organic Cotton](#)

Partnerships



[KOWA](#)

Service Company



[RESET](#)

Non-profit



Supply Chain Intervention: Standards/Chain of Custody Market making

Field-level Intervention: Field data & analytics Development Seed breeding Field capacity building & training Cotton cultivation/processing

Informing & Convening: Education & awareness raising Market research & analytics Multi-stakeholder platforms

United States



Photo: Jane Dever, Texas A&M AgriLife Research

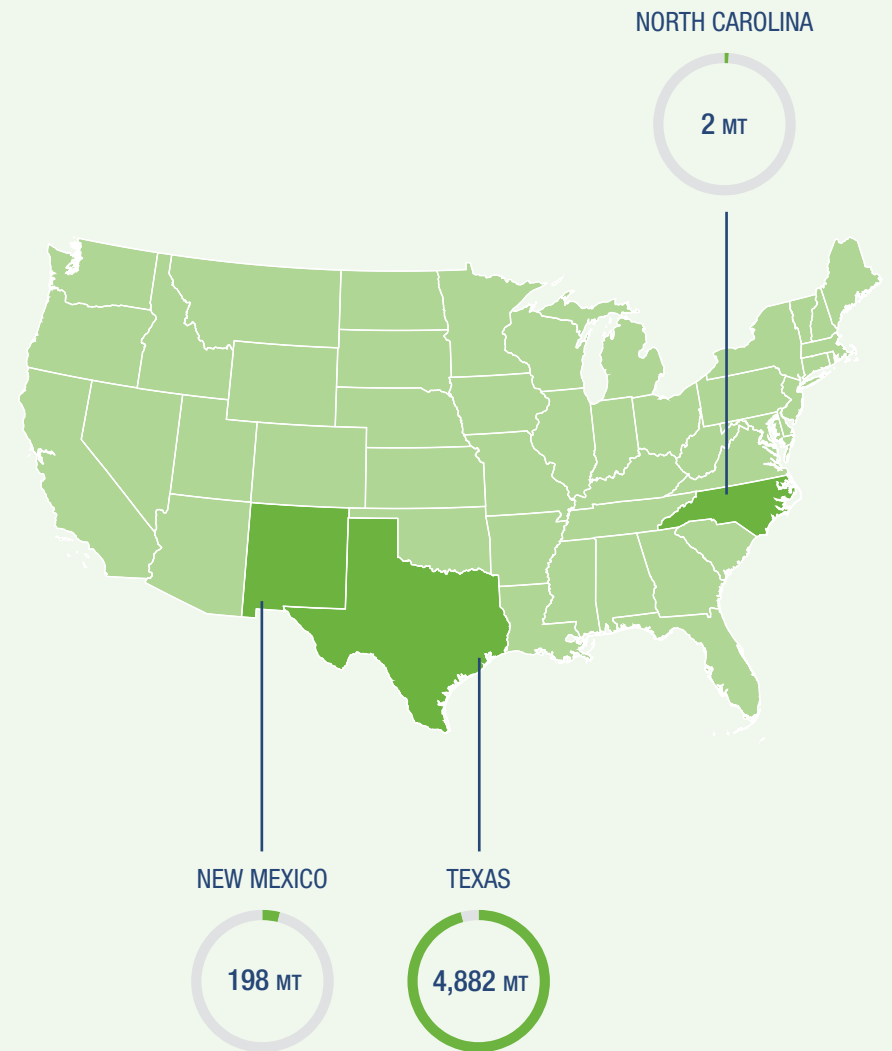
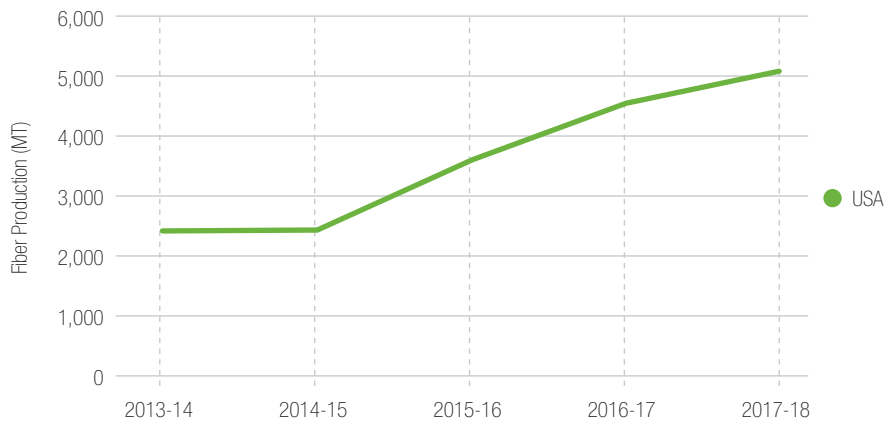
United States of America



2017/18 organic cotton production



5-YEAR PRODUCTION TREND



United States of America



Regional updates

- Oct 2017** Washington, D.C., USA US-based Textile Exchange leaders visited key senators in Washington, D.C. to educate them about organic fiber farming and the organic textile sector.
- Aug 2017** Texas, USA The first US GOTS-certified gin - Woolam Gin in O'Donnell, Texas - becomes certified. Woolam gins primarily for TOCMC.
- Fall 2017** New Mexico, USA New Mexico farmer Dosi Alvarez harvests the first commercial scale organic brown cotton grown since 2011.
- Feb 2018** Texas, USA The first organic cotton is ginned at King Mesa Gin in Texas as part of a new marketing pool formed to provide organic cotton to major brands for GOTS-certified personal care products.
- Feb 2018** Washington, D.C., USA USDA's Risk Management Agency revised its policies so as to deny insurance coverage for organic cotton in the Texas Gulf Coast area unless farmers can demonstrate a successful three-year history with organic production and have a viable marketing plan, following concerns around reporting accuracy.
- May 2018** USA Organic Trade Association's 2018 Organic Industry Survey shows the US organic fiber products market increased 11 percent from 2016-2017, to \$1.6 billion, representing the largest non-food organic sector.
- Dec 2018** USA New Mexico doubles its pima harvest in both acres and bales from 2017.
- June 2020** USA Organic Trade Association Organic Week

Photos: Texas A&M AgrLife Research (top); Texas Organic Cotton Marketing Cooperative (bottom)

New candidate organic cultivars have their own style

Commercial seed suitable for organic cotton production is limited because seed companies in the US have shifted away from producing non-GMO seed. Texas A&M AgrLife Research cotton breeding program partners with organic cotton farmers in Texas to develop cotton through classical breeding with stakeholder-defined objectives. New cultivars have a distinct leaf shape to help manage seed purity.



[Find out more >](#)



TOCMC delivering quality fiber and supporting organic

Texas Organic Cotton Marketing Coop (TOCMC) has approximately 40 producer members who plant 18-20,000 acres of organic and transitional cotton each year. TOCMC prides itself on its quality and reliability. Members are certified organic under the USDA-NOP and TOCMC is both USDA-NOP and GOTS certified. With a transaction certificate, buyers can know the producer's name and farm for each bale purchased. USDA classing specifications are used to classify each bale of TOCMC cotton into different quality pools.

[Find out more >](#)



United States of America



2017/18 organic cotton production

US organic cotton enjoyed a considerable increase in both land area (27 percent) and production (12 percent) in the 2017/18 reporting year, with production reaching 5,082 MT.

One reason for this growth is the inclusion of organic cotton into Procot Cooperative, managed by Allenberg Cotton Company, in order to supply organic cotton fiber to major brands for the production of GOTS-certified personal care products and apparel. The organic peanut production began first with organic cotton used as a rotational crop for proper soil health. Procot Cooperative has approximately 16 organic farms that produce the fiber and this is all ginned at King Mesa Gin in Lamesa, Texas.

As for the longstanding Texas Organic Cotton Marketing Cooperative (TOCMC), there was a 13 percent growth in total organic land area planted with cotton by its members, although fiber production declined slightly. Founded in 1993 and headquartered in Lubbock, Texas, TOCMC has long been a flagbearer for organic cotton in the US.

Besides TOCMC and the Procot Cooperative, organic cotton was also grown by 17 individual farmers spread

between Texas, New Mexico and North Carolina.

New Mexico farmer Dosi Alvarez harvested the first commercial-scale organic brown cotton grown since 2011, "Coyote" Brown organic Foxfibre® cotton.

Woolam Gin in O'Donnell, Texas, became the first US gin to be certified to the Global Organic Textile Standard (GOTS), and gins primarily for the TOCMC. GOTS requires that the entire supply chain, beginning with the gin, is certified if a company wants to make an organic claim for a finished product. A 2011 US Department of Agriculture (USDA) policy enables companies to make an organic claim if their products are GOTS certified.

On another note, the US Department of Agriculture uncovered and cracked down on fraudulent organic cotton production in the coastal area of Texas.

Regarding the market for organic cotton in the US, Organic Trade Association's 2019 Organic Industry Survey revealed that the US organic fiber products market increased 15 percent between 2017 and 2018 to \$1.8 billion, representing the largest US non-food organic sector.

Organic Trade Association: promotion, protection, education and research for the U.S. organic industry

The Organic Trade Association is the leading voice for the U.S. organic trade, representing over 9,500 organic businesses across 50 states and ranging from growers to retailers. It is a powerful voice at the federal, state and local levels, advocating for all things organic. Its Fiber Council provides the organic fiber and textile sectors networking and education opportunities, hosting events for consumers and the media and webinars about supply chain integrity, and creating useful fact sheets.

[Find out more ▶](#)



Regenerative is the future of organic farming

ROC® was created by a group of companies and organizations now working together under the name the Regenerative Organic Alliance (ROA). Led by Rodale Institute and spearheaded by Dr. Bronner's and Patagonia, other founding members of certification have included: Compassion in World Farming, Demeter, Fair World Project, Grain Place Foods, Maple Hill Creamery, Textile Exchange and White Oak Pastures. This non-profit has been established to continuously review and update the certification guidelines. It is made up of experts in farming, ranching, soil health, animal welfare, and farmer and worker fairness.

[Find out more ▶](#)

Photos: Organic Trade Association lobby team ©Sandra Marquardt (left); ROC ©Amy Kumler (right)

United States of America

Stakeholder directory

This map highlights some of the key organizations¹ working to support organic cotton in this region.

NORTH AMERICA

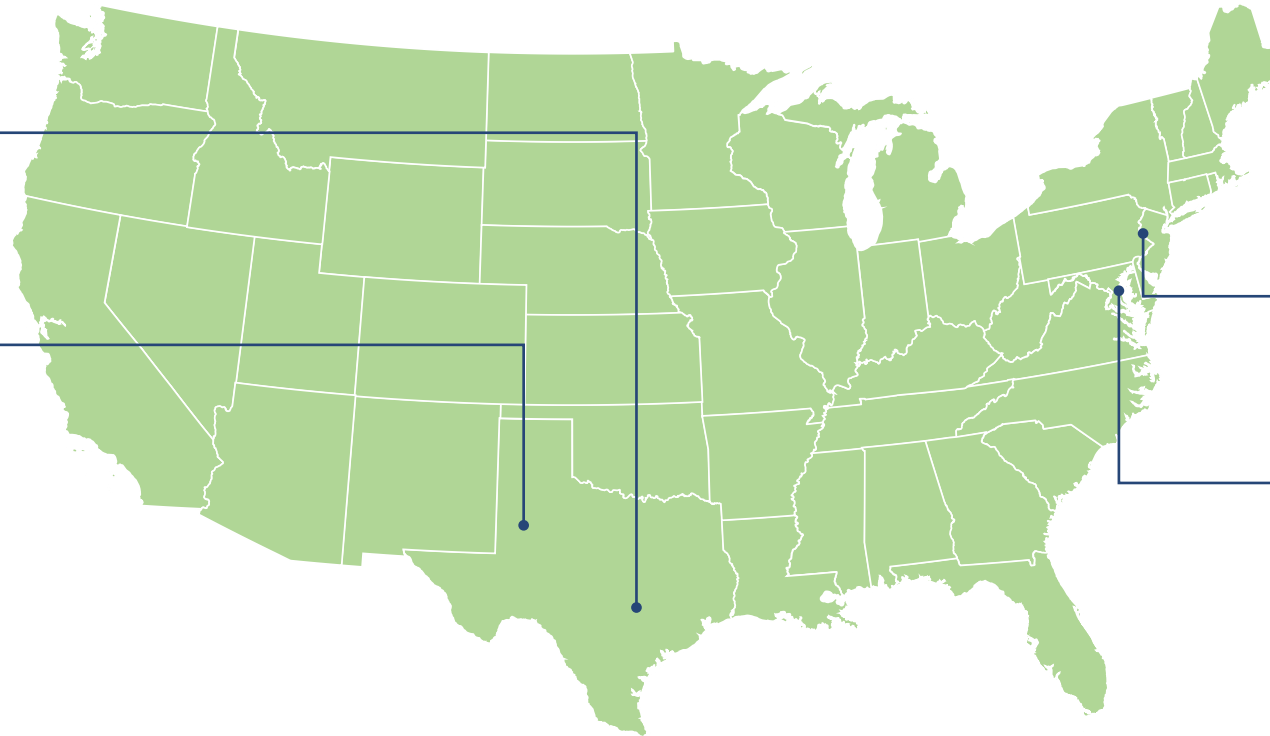
[Texas A&M AgriLife Research](#)

Research Institute



[Textile Exchange](#)

Non-profit



[Rodale Institute](#)

Research Institute



[Organic Trade Association](#)

Industry Association



Supply Chain Intervention: Standards/Chain of Custody Market making

Field-level Intervention: Field data & analytics Development Seed breeding Field capacity building & training Cotton cultivation/processing

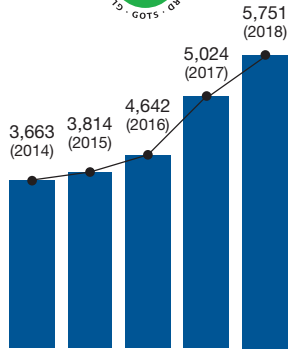
Informing & Convening: Education & awareness raising Market research & analytics Multi-stakeholder platforms

Standards & Certification

Standards & certification

Certified facilities*

GOTS

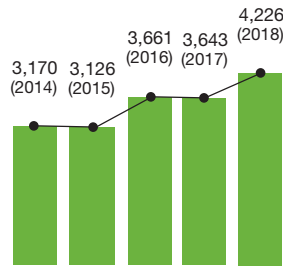


5,760 (↑15%)

Certified Facilities 2018

- India : ↑19%
- Bangladesh : ↑29%
- Turkey : ↑17%
- Germany : ↑4%
- Italy : ↑11%
- China : ↑3%
- Pakistan : ↑23%
- Portugal : ↑19%
- USA : ↑25%
- South Korea : ↑23%

OCS



4,226 (↑16%)

Certified Facilities 2018

- Bangladesh : ↑42%
- India : ↑9%
- China : ↑5%
- Turkey : ↑42%
- South Korea : ↑13%
- Japan : ↓1%
- Pakistan : ↓18%
- Portugal : ↑167%
- Sri Lanka : ↑24%
- Italy : ↑141%

TOP 10 COUNTRIES USING OCS & GOTS

GOTS has certified units in 64 countries & OCS in 47 countries



*Please note that the figures detailed on this page reflect the number of facilities certified to produce GOTS/OCS products in 2018, which may differ from the number that actually produced GOTS/OCS certified products in that year.

Standards & certification

Standards updates



Organic Content Standard

Number of OCS certified facilities increases 16 percent in 2018.

Between 2017 and 2018, the total number of OCS certified facilities grew 16 percent, from 3,643 to 4,226. The highest growth rate was seen in Italy (141 percent) but in terms of actual number of facilities, the largest contributors to the global growth are Bangladesh (+304 facilities) and Turkey (+169).

Become Part of the Organic Content Standard (OCS) Revision

Textile Exchange has opened a revision period for the Organic Content Standard 2.0, which will run from April 2019 to April 2020. On May 16, 2019, a kick-off call was held to explain how the OCS Revision will work and the role of the International Working Group as the key decision-makers. You can find a recording of this webinar [here](#).

Participation in the Revision is open to all. If you would like to join the International Working Group or make sure you are notified of updates, send an email to Amish@TextileExchange.org.

Policy on the GMO Screening of Organic Cotton

Textile Exchange has finalized the OCS-103-V1.0 Policy on the GMO Screening of Organic Cotton, applicable to OCS certification bodies. This policy is harmonized between Textile Exchange and GOTS, and takes effect October 1, 2019. Any comments on the policy will be considered as part of the OCS revision process. [Find out more](#).

Revision of Scope & Transaction Certificate Policy and Template

This policy and template are harmonized between Textile Exchange and GOTS.



Global Organic Textile Standard

Number of GOTS certified facilities increases 15 percent in 2018.

Between 2017 and 2018, the total number of GOTS certified facilities grew 15 percent, from 5,024 to 5,760. Progress is seen in both production and consuming regions. Countries and regions with the largest growth rate in 2018 are Bangladesh (29 percent), USA (25 percent), Pakistan (23 percent) and South Korea (23 percent). In terms of total numbers, the highest increase is reported from India (+315 facilities), followed by Bangladesh (+155) and Europe (+98).

GOTS 6.0 revision process

The formal GOTS 6.0 revision process commenced in March 2019. GOTS encouraged international organizations representative of any GOTS related aspect to contribute to the revision process. International stakeholders with expertise in the field of organic production, textile processing, textile chemistry, social criteria, and representing the industry, NGOs and consumer interests in the GOTS program were invited to contribute. The approach is set to binding requirements for ecological and social parameters. GOTS version 6.0 is scheduled to be released in March 2020.

GOTS signs UN Fashion Industry Charter for Climate Action

In December 2018, GOTS was one of the initial signatories of the Fashion Industry Charter for Climate Action, under the auspices of UN Climate Change. Aligned with the goals of the Paris Agreement, the Charter contains the vision for the industry to achieve net zero emissions by 2050. The Charter defines issues that will be addressed by the signatories, ranging from decarbonization of the production phase, selection of climate-friendly and sustainable materials, low-carbon transport, improved consumer dialogue and awareness, working with the financing community and policymakers to catalyze scalable solutions, and exploring circular business models. Six working groups are in charge of defining steps for implementation. GOTS set the focus on promoting organic production and processing, to contribute to the reduction of carbon.

Standards & certification

Centralized Database System

The Central Database System (CDS) is a collaborative technical platform for the chain of custody of GOTS and Textile Exchange standards. Developed in partnership between the two organizations, the CDS integrates scope certificates, transaction certificates, and volume reconciliation across all supply chain actors for Global Organic Textile Standard (GOTS) and Organic Content Standard (OCS) in organic, as well as Content Claim Standard (CCS), Recycled Claim Standard (RCS), Global Recycled Standard (GRS), Responsible Down Standard (RDS) and Responsible Wool Standard (RWS) in other preferred fiber and materials.

Objectives of the CDS

- Increase efficiency, traceability, and transparency of certification and its related activities by providing greater access to certification data;
- Prevent fraud for certificates and duplicate organic orders by creating a single source for verification and volume reconciliation;
- Provide standards' impact data for standard scheme owners;
- Provide public facing data about certified companies; and

- Provide opportunity for traceability and transparency of material source and supply chain member data for stakeholders.

The current review of the organic standards for backward traceability from gin to farm, to be incorporated into the CDS, will further connect the national organic farm standards and OCS and GOTS.

Implementation phases

The CDS is a multi-phased project spanning over four phases, with the scope, deliverables and partnership of each phase subject to stakeholder requirements and feedback and outcome of the preceding phase.

- **Phase 1 (2019):** Digitalization of existing scope and transaction certification process into one system
- **Phase 2 (2020):** Increase integrity and accessibility
- **Phase 3 (2021):** Evolution of existing standard process
- **Phase 4 (2020+):** Data analytics and reporting

What does this mean?

- CDS will be the single source system for verification of scope certificates and transaction certificates for GOTS and Textile Exchange standards.
- GOTS and Textile Exchange standard licensees, as well as buyers and sellers of a transaction certificate, can check scope and transaction certificate profile and validity in the CDS.

How to be involved?

- **LEARN:** Find out more about the development of the CDS and how it affects your organization.
- **ENGAGE:** Be a part of the CDS Working Group to understand and help shape the development of the CDS.
- **SPONSOR:** The CDS is an initiative to strengthen the integrity of the organic and other preferred fiber and materials. Your contribution will help our continuous effort for better traceability, transparency and reporting of these materials.

To find out more, email:
Lee@TextileExchange.org.

Methodology & Disclaimer

2019 methodology & disclaimer

Textile Exchange is in the unique position of being the only organization currently reporting on the global organic cotton supply and trends on an annual basis.

Our priority is to ensure the accuracy and quality of our data, management systems, and reporting. In 2018, with the sponsorship of C&A Foundation, Textile Exchange achieved [independent third-party verification](#) on its organic cotton data processes to the Global Reporting Initiative (GRI) standard and Accountability Principles for the Organic Cotton Market Report (OCMR).

The following sections sets out the abridged methodology used to collect, analyze and crosscheck the data on the production of organic cotton fiber in 2018.

Key terms & definitions

Organic Cotton: Organic Cotton is cotton that is produced according to the IFOAM Principles of Organic Agriculture and certified to the IFOAM Family of Standards at the farm level. At present, the main farm standards include the EU Organic Regulations in Europe (EU-Reg), USDA National Organic Program (NOP) in United States, and the National Programme for Organic Production (NPOP) in India. Organic cotton production from [Participatory Guarantee System \(PGS\)](#) that falls outside of [IFOAM's PGS recognized programs](#) are specifically mentioned.

Organic cotton is grown as part of a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects, and is grown in rotation with other crops that replenish the soil. Organic cotton requires a third-party certification from an independent, accredited Certification Body

(CB). Organic cotton growing practices may vary slightly from country to country but common to all is the avoidance of the use of toxic and persistent synthetic agrichemicals (pesticides and fertilizers) and genetically modified seeds.

Seed cotton: Seed cotton is the raw cotton including fiber and seeds (i.e. pre-ginning cotton).

Cotton Fiber/Lint: Cotton fiber/lint is cotton that has gone through the ginning process to remove seeds, leaves and casings (i.e. post-ginning cotton).

Cotton In-Transition: For cotton to be certified organic, it must be grown organically on land that has undergone a three-year transition period from conventional practices (note the transition period may be reduced in certain circumstances). While no toxic chemicals are allowed during this time, the transition period is required to eliminate remaining residues left in the soil from past conventional practices. Cotton produced during the three-year transition period is termed Cotton In-Transition.

Organic Certified Land / Land Area Certified To Organic: Organic cotton must be grown on land area certified as organic to the [IFOAM Family of standards](#). However, as organic cotton is grown within a rotation system to build soil fertility, depending on soil and climatic conditions, the same piece of land may also grow a variety of other crops such as groundnuts, maize and beans. As the scope of organic certification covers the variety of crops grown, the land area recorded during a certification process is referred to Organic Certified Land.

In-Transition Land: In-Transition Land refers to land that is undergoing the required three-year transition period from conventional to organic as required by all organic standards. While no

toxic chemicals are allowed during this time, the transition period is required to eliminate remaining residues left in the soil from past conventional practices. Land undergoing the first, second and third year of this transition period is referred to as Year 1 (Y1), Year 2 (Y2) and Year 3 (Y3) In-Transition Land, respectively.

Yield: Measured in kilograms per hectare (kg/ha), Yield refers the amount of cotton produced (in kilograms) for each hectare of land farmed. Yield is typically measured at two levels: Seed Cotton Yield (i.e. pre-ginning) and Cotton Fiber Yield (i.e. post-ginning).

Metrics (ha, kg, MT, m, b): This report uses the metric system for measurements and units have been abbreviated as follows. Different local units are converted into international, harmonized units: ha = hectare (1 hectare = 2.47 acres); kg = kilogram (1 kg = to 2.20 lbs. = 0.0045929637955183 US bales = 0.005882353 Indian bales); MT = metric ton (1,000 kg); m = million (1 m = 1,000,000 kg); b = billion (1 b = 100,000,000).

Reporting boundaries, completeness and accuracy

Reporting Period: The data are collected over a 12 month cycle and are based on the International Cotton Advisory Council (ICAC) harvest year of 1 August to 31st July. In 2019, data for the 2017/18 harvest year were collected. In countries such as Tanzania, where the cotton is picked between July 2017 and August 2018 (i.e. covering 2 ICAC years), the data is allocated to the first year (e.g. 2017). In countries such as the USA, where the cotton is picked in October 2018 to December 2018, data for the previous calendar year (e.g. October 2017 – December 2017) is reported.

Cotton Producing Countries/Production: In 2019, Textile Exchange's systematic collection, review and reporting of organic cotton production covers more than 95 percent of overall cotton production volume and 49 percent cotton producing countries. In all, 31 of the 63 cotton producing countries have been identified as potentially relevant for organic cotton production and covered by an independently verified systematic data process. This identification process has been based on data collected, publicly available records, interviews and correspondence with various stakeholders.

Standards (Cultivation): Textile Exchange applies a complete list of all standards accepted in accordance to "IFOAM Family of Standards." A systematic completeness check was carried out on all data collected against published data by 53 Certification Bodies across 46 IFOAM Family of Standards.

Data sources

Organic cotton data is collected from governmental agencies (GOV), certification bodies (CB), organic cotton producers (OCP), gins, and others e.g. initiatives or brands. Wherever possible, data from each country is collected from more than one source and validated against each other. While primacy is given to data supplied by government agencies and certification bodies, data from organic cotton producers continues to play an important function for cross-validation and to understand farm level scenarios, as certification body data is limited to a small set of indicators. Collection methods range from public database search, telephone interviews, site visits and email correspondence between April and September 2019. The following table provides a breakdown of data sources used for each of the 31 countries covered in 2019 OCMR.

2019 methodology & disclaimer

Country	GOV	CB	OCP	Gin	Other
Argentina			P		
Australia					P
Bangladesh	P				
Benin			P		
Brazil		S	P		
Burkina faso			P		
China	P	P	P		
Colombia			P		P
Egypt		S	P		
Ethiopia		S	P		
Greece	P				
India	S	P	S		
Israel		P			
Kyrgyzstan		P	P		
Mali			P		
Mexico	P				
Myanmar		S	P		
Nicaragua			P		P
Pakistan		S	P		
Paraguay			P		P
Peru			P		
Senegal			P		
South africa			P		
Tajikistan		P			
Tanzania		S	P		
Thailand			P		
Turkey	P	S			
Uganda					P
USA	S		S	P	
Uzbekistan		P			
Zambia					P

GOV =government agency; CB = certification body;
OCP = organic cotton producer.

For the 2019 OCMR, the final organic cotton production data was based on data sourced from: Government agencies (10 percent); certification bodies (73 percent); organic cotton producers (13 per cent); ginners (3 percent); and initiatives or brands (1 percent).

Data analysis and checks

Textile Exchange makes every attempt to obtain a single complete data set per country from Certification Body, a secondary data source from an Organic Cotton Producer and where possible a third data source from alternative stakeholders.

The different data sets are harmonized for metric consistency and in the case of missing data or data deviation, scenarios or average data are used. Collecting data from multiple sources allows Textile Exchange to triangulate the information from different providers and cross-check against data reported in the past. In case of inconsistencies, rationales for decision-making are defined in a systematic process and documented. In case of data gaps, where possible historical data and industry averages are inferred. Where data gaps cannot be filled, partial data is reported and marked as a general indication. The final aggregates are proofed by industry experts.

Special remarks

Production Volume: A Certification Body estimates the production volume of an Organic Cotton Producer at time of audit. Within the certification process, a variance of up to 10 percent is permitted between estimated production (at time of audit) and actual harvest (post audit). As at time of data collection, Organic Cotton Producers would have realized its harvest, data collected from Organic Cotton Producers is likely to be based on actual production whereas

data reported by Certification Bodies is likely to be based on estimated production. Production volume collected from varying data sources is reported in OCMR on an as-is basis and does not account for any variance between estimated and actual production.

Historical or Average Yields: Where data is only provided for land area but not the production volumes, historical yields known for the specific project or locality or annual national average yields (as agreed by the government and applied by certifying bodies) have been used to calculate the production volume.

Land Area Certified to Organic: In selected cases where land area under organic cotton is reported and total land area certified to organic is not reported, the latter is estimated to be equal to the former.

Ginning Outturn: Where only seed cotton data is available, lint production is estimated using the ginning outturn known for the country.

Estimation for Intercrops: Where only the total certified land was reported, the average rate of intercrops was applied to derive fiber production. (e.g. in India an estimated 33 percent for intercrops is applied as per Certification Body methodology).

Land In-Transition: In selected cases where in-transition organic cotton fiber production from land area in-transition is reported and land area in-transition is not reported, yield is applied as the divisor to derive land area in-transition.

Reporting limitations

- The completeness of data for farmers and land in-transition is limited to the aggregate of those who can provide data. It is acknowledged that this data is not complete and is not representative of the total number of farmers covered by organic.
- The integrity of organic cotton is assumed addressed through the certification process and that all organic cotton production data provided by data sources are certified.
- Production data provided by data sources are accurate, true and complete to the reporting period specified.
- The variance between estimated production captured at audit by a Certification Body and the actual harvest volume reported by Organic Cotton Producers is acceptable (per the certification process).
- Research findings are dependent on publicly available data and it is the responsibility of Certification and Accreditation Bodies to make available all pertinent data and information.

2019 methodology & disclaimer

In 2019, the following limitations apply:

- **China:** The list of organic cotton producers is based on information collected from government agencies' public databases, key certification bodies and sponsors of organic cotton producers. Where organic cotton producers cannot be contacted, a proxy of 80 percent is applied to the production aggregate that are dually certified to both the Chinese National Organic Program (NOP) and the European Union standard.
- **Greece:** 2016/17 data has been used as a proxy because data is not ready from the source at the time of this report.
- **Uganda:** 2016/17 data has been used as a proxy because data is not ready from the source at the time of this report.

Disclaimer

Textile Exchange collects and reports production of certified organic cotton data from Accreditation Bodies, Certification Bodies, Organic Cotton Producers as well as other stakeholders on an as-is basis. Data reported is intended as a snapshot of production and makes no representation on total supply. While Textile Exchange carries out a systematic completeness and accuracy check on its data collection process, we rely on our data providers for data accuracy and integrity. Where data gap exists, Textile Exchange attempts to replace these values with best estimates from historical or comparable proxies. Data reported may change due to corrections or updates from data sources.

For the purpose of the OCMR, organic cotton does not include any uncertified naturally grown cotton nor does it make any statement regarding the integrity beyond its certification, and reported numbers, as reported by our data providers.

Appendices

Appendices

About Textile Exchange

Founded in 2002, Textile Exchange is a global nonprofit that creates leaders in the sustainable fiber and materials industry by providing learning opportunities, tools, insight, standards, data, measurement and benchmarking, and by building a community that can collectively accomplish what no individual or company can do alone. Textile Exchange also manages and promotes a suite of leading industry standards - including organic, recycled, responsible down and responsible wool - and collects and publishes important industry data and insights that enable brands and retailers to measure, manage and track their use of preferred fiber and materials. With more than 350 members that represent leading brands, retailers and suppliers, Textile Exchange has meaningfully accelerated the use of preferred fibers and increased the adoption of standards and certifications in the global textile industry.

Textile Exchange members are connected to a powerful community of brands, retailers, and companies, large and small, from across the textile world—all seeking to create a more sustainable and responsible fiber and materials industry. Members gain access to a suite of valuable tools, relevant data, insight reports, industry networks and connections—and the opportunity to take action, individually or collectively. Our goal is to help you succeed. Join us in our collective journey!

To learn more about Textile Exchange, visit: TextileExchange.org. Follow us on Twitter at [@TextileExchange](https://twitter.com/TextileExchange).



Textile Exchange has [three tiers of membership](#) to suit your company or organization's needs, including Friend, Supporter, Partner (Brand/Retailer) and Partner (Supply Network). Partner members, as of September 15, 2019, are:



Appendices

Further resources

Visit the [Textile Exchange Store](#) or use the links below to access Textile Exchange's suite of organic cotton resources.

- [AboutOrganicCotton.org \(microsite\)](#)
- [2018 Organic Cotton Market Report \(pdf\)](#)
- [2017 Organic Cotton Market Report \(pdf\)](#)
- [2016 Organic Cotton Market Report \(pdf\)](#)
- [Achieving the SDGs through Organic Cotton \(webpage\)](#)
- [Achieving the SDGs through Organic Cotton \(pdf\)](#)
- [Organic Cotton Round Table \(webpage\)](#)
- [Turkey Organic Cotton Sourcing Guide \(pdf\)](#)
- [Kering & Textile Exchange | Organic Cotton: A Fiber Classification Guide \(pdf\)](#)
- [Kering & Textile Exchange | A World Beyond Certification: A Best Practices Guide for Organic Cotton Trade Models \(pdf\)](#)
- [Quick Guide to Organic Cotton \(pdf\)](#)
- [Life Cycle Assessment of Organic Cotton: Full Report \(pdf\)](#)
- [Life Cycle Assessment of Organic Cotton: Summary of Findings \(pdf\)](#)
- [Organic Cotton Sustainability Assessment Tool \(OC-SAT\) \(online tool - requires Flash\)](#)
- [OC-SAT Summary of Findings \(pdf\)](#)
- [Organic Cotton Material Snapshots \(pdf\)](#)
- [Organic Cotton Material Summary \(pdf\)](#)
- [2025 Sustainable Cotton Challenge - First Annual Report 2018 \(pdf\)](#)



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It has been a privilege to work alongside the committed community of organic cotton farmers, manufacturers, brands, and retailers to generate this report. We would like to extend our sincere gratitude to all that have contributed data, expertise, updates and photos for their continued and valuable co-operation:

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Textile Exchange envisions a global textile industry that protects and restores the environment and enhances lives.

www.TextileExchange.org

To learn more about organic cotton, visit Textile Exchange's dedicated microsite:

www.aboutorganiccotton.org

For the latest news and trends in the wider preferred fiber and materials landscape, check out Textile Exchange's [2019 Preferred Fiber & Materials Market Report](#).