



cooperativas  
agro-alimentarias  
Andalucía

# COTTON PRODUCTION IN SPAIN

2022-2023 CAMPAIGN AND 2023/2024 OUTLOOK.

COOPERATIVAS AGROALIMENTARIAS DE ESPAÑA



### Development of the 2022/2023 campaign:

The crop has decreased in area compared to previous seasons.

The rains in April and the high temperatures in May favoured the emergence and subsequent vegetative development of the crop, which had to be replanted in very few plots.

High temperatures in July led to a higher drop in buds and small capsules compared to previous years.

There was a wide disparity in cotton development and phenology between counties and between plots, depending on the availability of irrigation water.

A drop in yields was expected as a consequence of the decrease in irrigation allocation for this season.

**Result of the 2022/2023 campaign:**



**123,500 mt.**

**29.34% less** than last year's final production. **33.04% less** than the average of the last 3 seasons.

The estimate of the technical services of the C. Agriculture was 127,000 mt.



## Surface area by province

PROVINCE	AREA 2021/2022 (ha)	AREA 2022/2023 (ha)	Difference in Absolute value (ha)	VARIATION (%)
Cadiz	11.847	11.568	280	-2,36 %
Cordoba	3.449	2.931	518	-15,02 %
Huelva	295	141	155	-52,37 %
Jaén	3.874	3.246	628	-16,21 %
Seville	38.074	34.067	4.007	-10,52 %
ANDALUSIA	57.539	51.952	5.587	-9,71 %

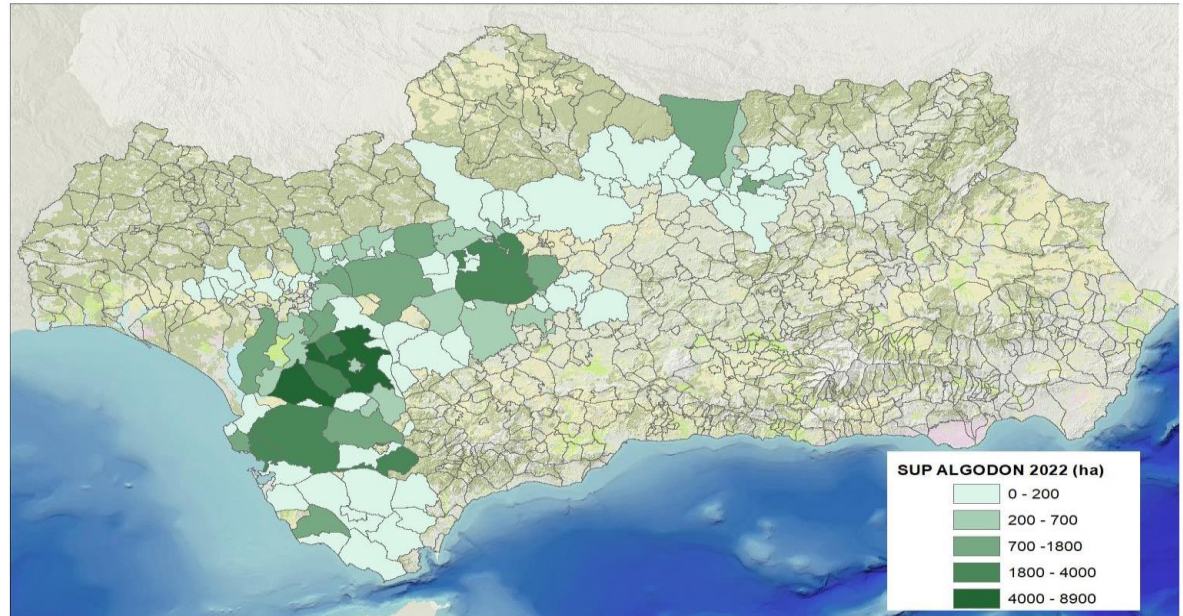
In the 22/23 season, the declared area in **Andalusia** totalled **51,952 ha**,

5,587 ha less than last season (**-9.71% compared to the previous season**).

Generalised decline in all provinces. Huelva has the largest percentage decrease (- 52.37%) and Seville, the main cotton-producing province, has seen the largest decrease in absolute value, with 4,007 hectares less (- 10.52 % compared to 2021/22).

## Cotton area distributed by municipalities

Campaign  
2022/2023



Source: Crop declarations (CAP).

Province	2021/2022 CAMPAIGN		CAMPAIGN 2022/2023		CHANGE 2021-2022 (%)	
	Production (t)	Yield (kg/ha)	Production capacity (t)	Estimated yield (kg/ha)	Production	Performance
Cadiz	34.480	2.910	32.918	2.846	-4,53 %	-2,22 %
Cordoba	10.716	3.107	6.125	2.090	-42,84 %	-32,74 %
Huelva	392	1.328	210	1.494	-46,42 %	12,50 %
Jaén	11.270	2.909	3.079	949	-72,68 %	-67,39 %
Seville	118.068	3.101	84.487	2.480	-28,44 %	-20,03 %
<b>ANDALUSIA</b>	<b>174.926</b>	<b>3.040</b>	<b>126.820</b>	<b>2.441</b>	<b>-27,50 %</b>	<b>-19,70 %</b>

-In the 22-23 season, **Andalusia's production** is expected to **fall by 27.5 % compared to 2021/2022**, with a lower average yield than last year (-19.70%).

-A drop in production is expected in all provinces: less marked in Cadiz (-4.53%) and of greater importance in Cordoba (-42.84%), Huelva (-46.42%) and Jaen (-72.68%). In Seville -22.3 % is expected.

-The main cotton-producing province will be **Seville with 66.6 % of the estimated Andalusian crop**, followed by Cadiz with 26% of the total.



cooperativas  
agro-alimentarias  
Andalucía

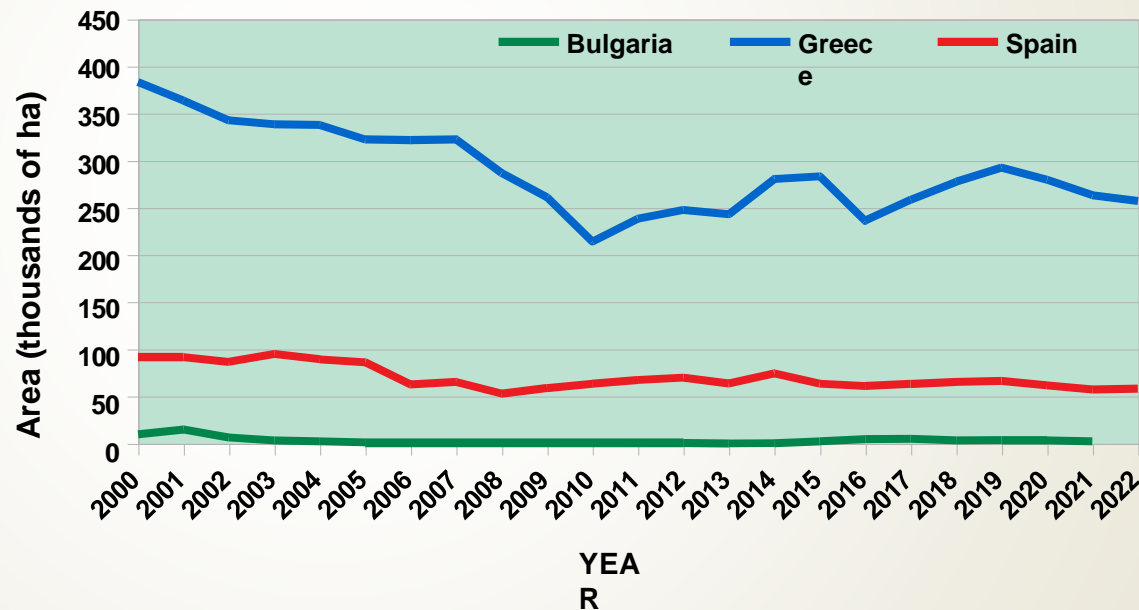
## Spain

The only producing areas in the country are in **Andalusia and the Region of Murcia** (although the latter only sows about 15 hectares).

## European Union

**Greece is the leading** cotton producer, Spain and a testimonial Bulgaria.

The following way

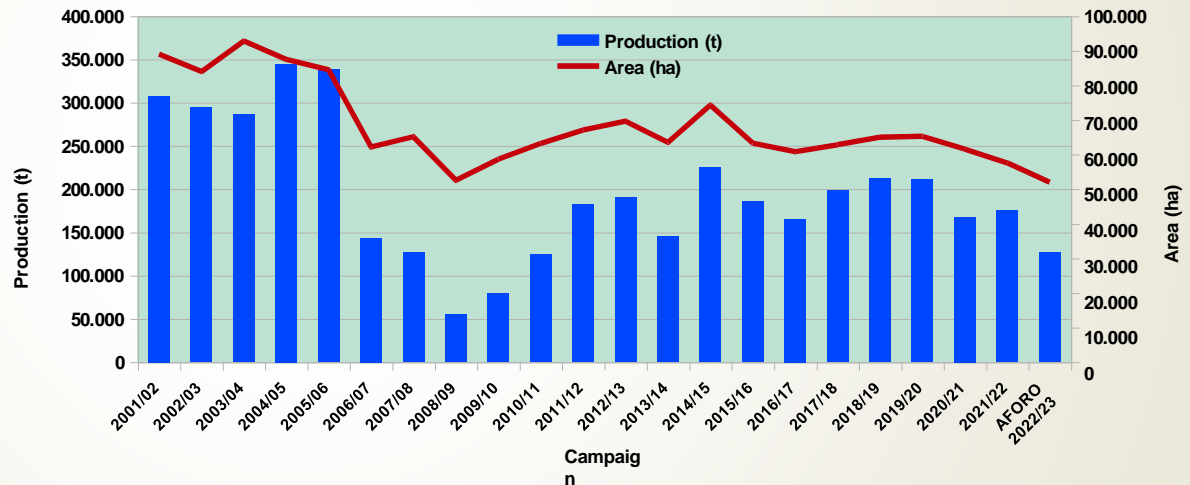




## Evolution of cotton areas and production in Andalusia.

- As of 2006, the surface area and cotton production in Andalusia decreases drastically, as consequence of the reform of the CAP on production subsidies for cotton.

- From 2009 onwards, they have gradually recovered, falling slightly again in 2015/16 and 2016/17, following the latest CAP reform. In recent years there has been a decline due to the lack of water.



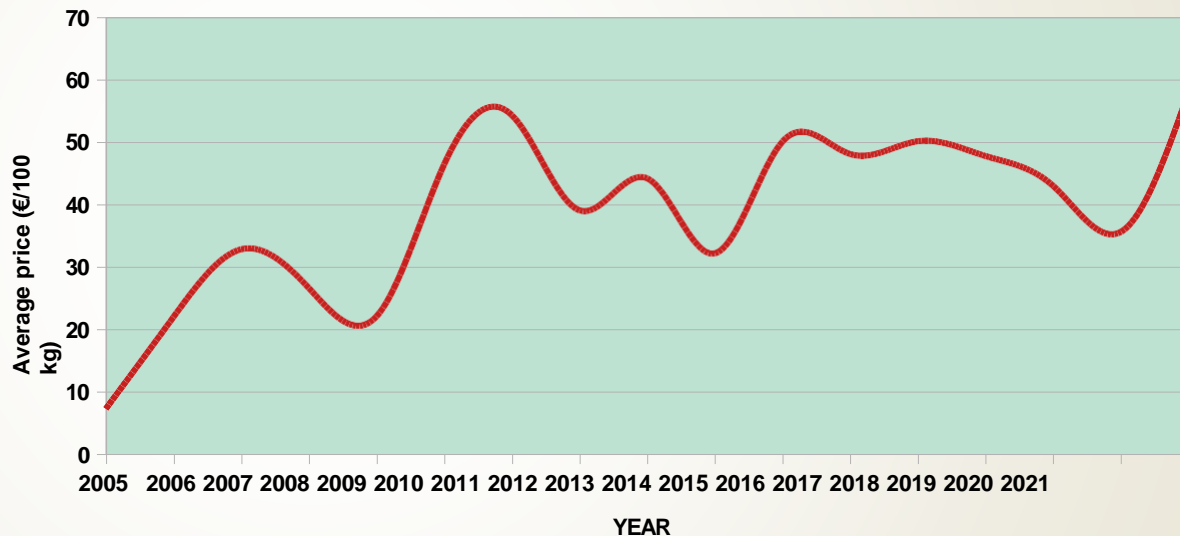




cooperativas  
agro-alimentarias  
Andalucía

## Price developments in origin

After gradual decreases since 2017, there is a considerable increase in **2021** to reach **58.02 €/100 kg**, surpassing even the maximum reached in 2011 which was 54.18 €/100 kg.



Source: CAADR.

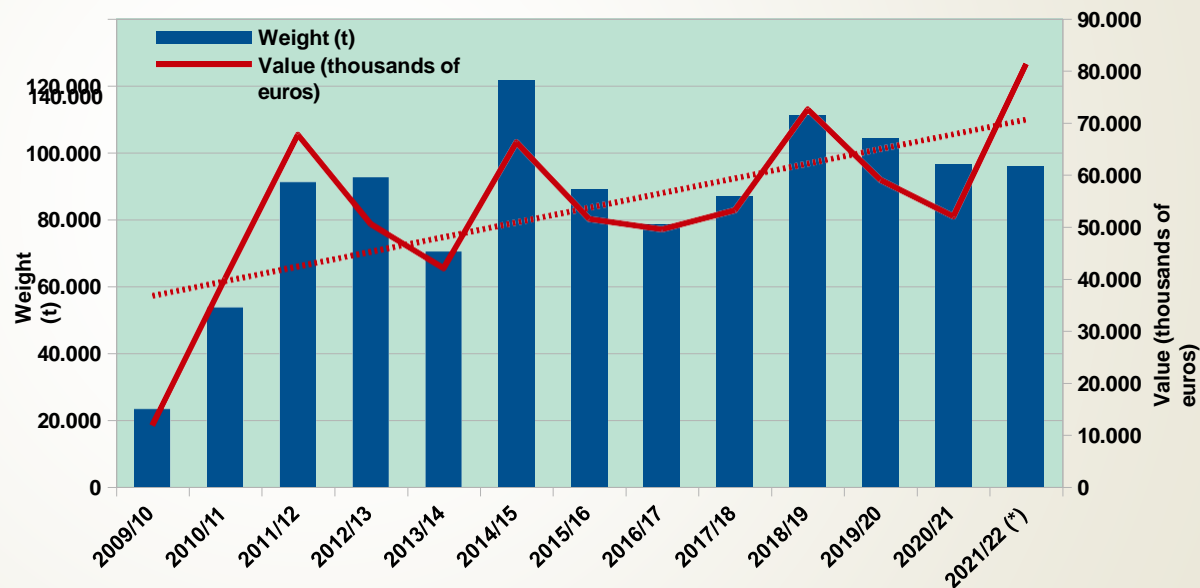


cooperativas  
agro-alimentarias  
Andalucía

## Evolution of cotton exports from Spain

At national level, in the 2021/22 season (with data up to June 2022), a volume of **61,689 tonnes** of cotton fibre was exported, worth **126.34 million euros**.

On average, exports account for **94 %** of cotton fibre production.



Source: Foreign Trade Institute. ICEX. Cotton fibre (TARIC code CN 5201 00).

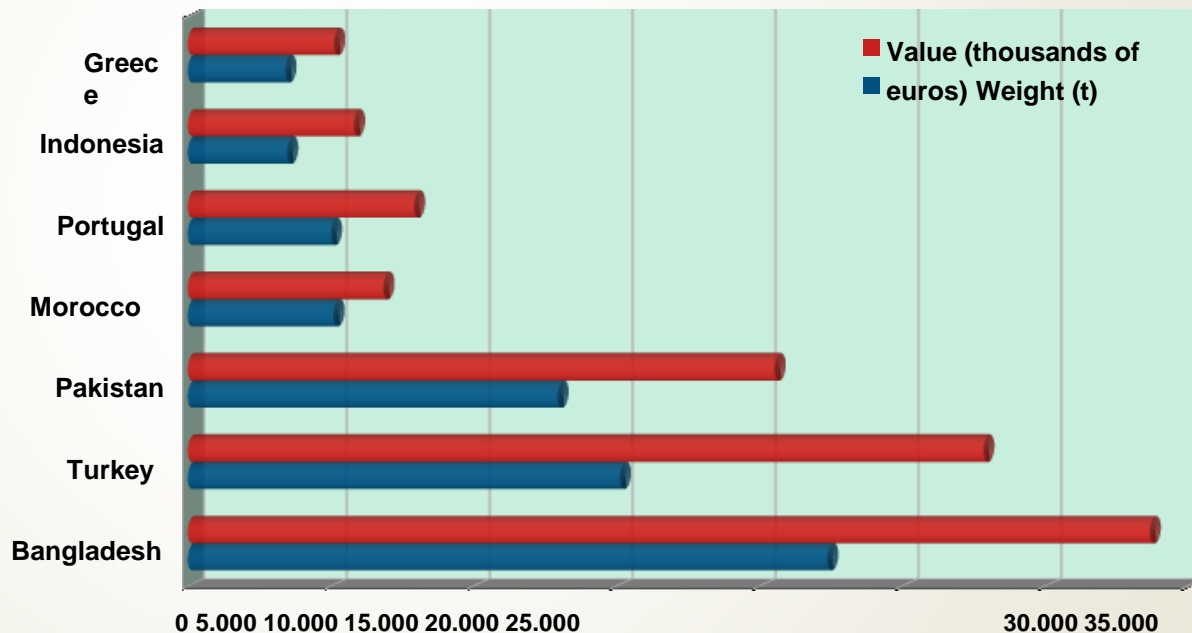
\* Campaign 2021/22 incomplete. Data from October to June.



cooperativas  
agro-alimentarias  
Andalucía

## Destination of exports of cotton from Spain in 2021

In **2021**, domestic exports of cotton fibre amounted to **77,002 t**, the main destinations being **Bangladesh (29.1%)**, followed by Turkey (19.7%), Pakistan (16.8%), Morocco (6.6%) and Portugal (6.5%).



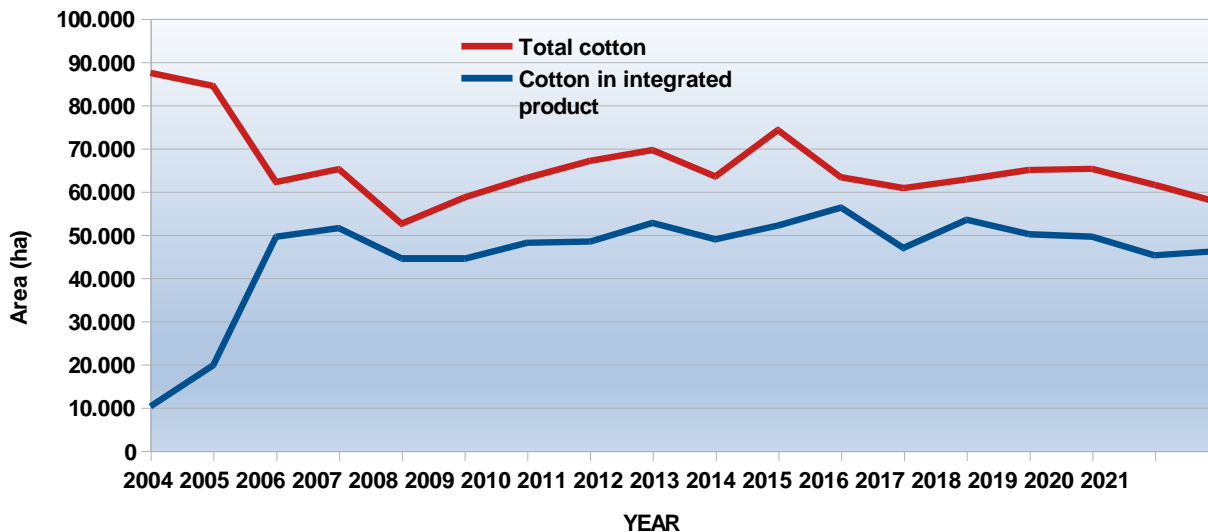
Source: Foreign Trade Institute. ICEX. Cotton fibre (TARIC code CN 5201 00)

## ENVIRONMENTAL SUSTAINABILITY COTTON CULTIVATION SPAIN

### Integrated production

The cotton area under **Integrated Production** in 2021 amounted to **46,206 ha**, accounting for 80.3% of the total cotton area.

Since 2007 the cotton area in integrated production has fluctuated without major changes.





## Andalusia

	ECOLOGICAL SUPPORT AREA (ha)			AGRO- ENVIRONMENTAL AID AREA (ha)		
	Campaig n 2021/2022	Campaig n 2022/2023	Change (%)	Campaig n 2021/2022	Campaig n 2022/2023	Change (%)
Cadiz	5	46	794,71 %	9.098	8.492	-6,66 %
Cordoba	0	10	- -	1.492	1.267	-15,10 %
Huelva	0	0	- -	213	130	-39,20 %
Jaén	0	0	- -	2.962	2.381	-19,63 %
Seville	12	2	-79,95 %	27.133	24.214	-10,76 %
ANDALUSIA	17	58	232,45 %	40.899	36.482	-10,80 %

-In the CAP 2022, the application for aid for **organic production** has been made for an area of **58 hectares**, three times the area applied for last year.

- With regard to **agri-environmental** aid, an area of **36,482 hectares** of cotton has been applied for this season, This represents 70.2% of the total area declared in Andalusia and 10.8% less than last year, when aid was requested for 71.1% of the area declared.

## **Sustainability of cotton cultivation in Spain: Integrated Production**

- Area of cotton under integrated production 80%
- The introduction of agri-environmental programmes and the API support programme has brought about a major change in crop management.
- Environmentally sustainable production method.
- Improvements in cotton cultivation:
  - No use of plastics in cultivation.
  - Plant and soil condition monitoring. Fertiliser application and irrigation where and when the soil and plant needs it.
  - Reduction of fertiliser by 32% and water use by 40% less before IP implementation
  - Reduction of phytosanitary applications by 52%.



cooperativas  
agro-alimentarias  
Andalucía

## Cotton production in Andalusia

### CONCLUSIONS 2022/2023

-Cotton production for the 2022/2023 season was 123,500 **tonnes**. This is 29.04% less than last year's final production and 33.04% less than the average of the last three seasons.

-The cotton area declared for the CAP 2022 amounts to **51,952 hectares** in Andalusia, a decrease of 9.71% compared to last year.

-The **Integrated Production** Area reached **46,206 hectares** in 2021, accounting for 80.3% of the total cotton area.

-As for the export (from October 2021 to June 2022) of cotton fibre, the volume of cotton fibre exported was **61,689 tonnes** of cotton fibre, worth 126.34 million euros.

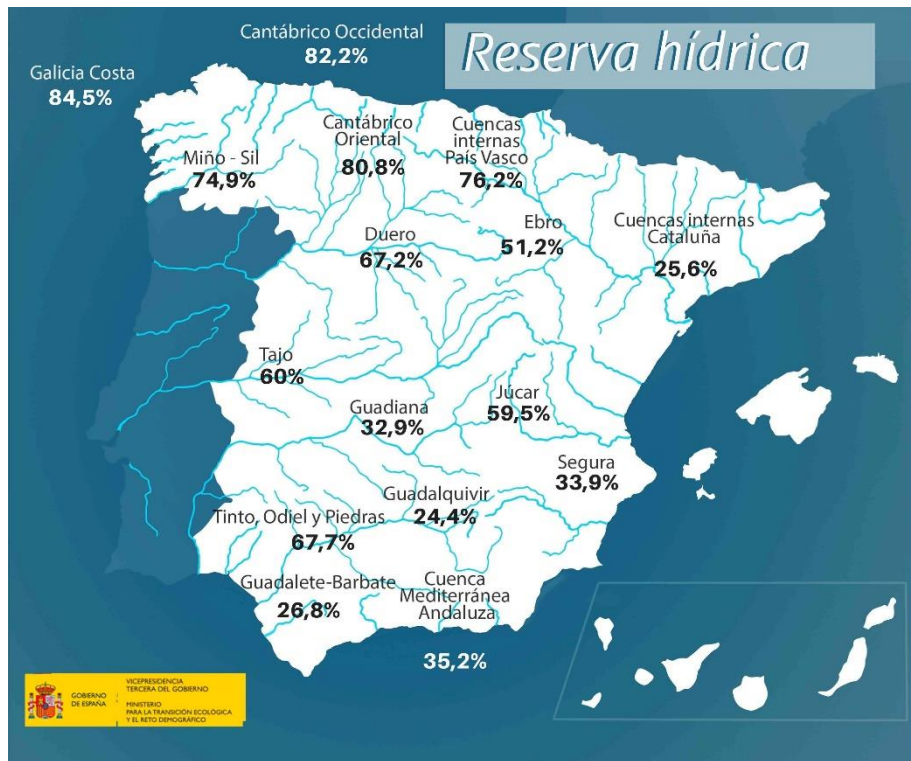




cooperativas  
agro-alimentarias  
Andalucía

Main problem: lack of water.

Water stored in Spain april 2023. Cotton area: 26.8%.





cooperativas  
agro-alimentarias  
Andalucía

## Prospects for the 2023/2024 season

- Main problem in Spain: lack of water. 700 m<sup>2</sup>/ha when 4000/4500 m<sup>3</sup>/ha is needed.
- Prospects for the same area for the 2022/2023 season. Farmers expect rain but are not optimistic.
- Increased production costs
- Lack of availability of plant protection products.
- And as a consequence lower production per hectare

## Conclusions

- Cotton is a crucial crop in the production areas in Spain both economically, socially and environmentally. Social and environmental
- Generation of 3000 jobs
- No economic alternatives to this crop in the producing areas.
- Major efforts in the sector in terms of environmental sustainability: no use of plastics, reduced use of water, fertilisers and chemicals.
- CAP aid is essential to maintain cultivation in Spain.
- Increased production costs
- Lack of availability of plant protection products. Concern about the European Commission proposal SUR.
- Decrease in irrigation water allocation



cooperativas  
agro-alimentarias  
Andalucía

**THANK YOU FOR YOUR  
ATTENTION**