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Cotton and Products Annual

2018 West Africa Cotton and Products Annual

Approved By:
Joshua Emmanuel Lagos

Prepared By:
Jasmine Osinski
Fana Sylla

Report Highlights:
MY 2018/19 (August to July) total area for Burkina Faso, Chad, Mali, and Senegal is projected to decrease to 1.67 million hectares (HA) due to the possibility of limited credit and inputs in Burkina Faso and Chad. For MY 2018/19 total cotton production for all the aforementioned countries is estimated to rise four percent to 2.86 million metric tons (MMT) on expectations of strong prices, good weather, and better pest management. MY 2018/19 total exports are expected to increase three percent on higher exportable supplies and strong international demand. This annual report primarily focuses on providing an overview of Burkina Faso; it includes an abridged analysis for Mali, Chad, and Senegal.

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Executive Summary:

MY 2018/19 (August to July) total area for Burkina Faso, Chad, Mali, and Senegal is projected to decrease to 1.67 million hectares (HA) due to the possibility of limited credit and inputs in Burkina Faso and Chad. For MY 2018/19 total cotton production for all the aforementioned countries is estimated to rise four percent to 2.86 million metric tons (MMT) on expectations of strong prices, good weather, and better pest management. MY 2018/19 total exports are expected to increase three percent on higher exportable supplies and strong international demand. This annual report primarily focuses on providing an overview of Burkina Faso; it includes an abridged analysis for Mali, Chad, and Senegal.

Many Burkina Faso cottons farmers are reportedly in default and unable to pay loans for the last crop season due to low production, which may bar them from accessing financing for MY 2018/19. The union of cotton farmers requested that the ginning companies reduce the remaining debt by half and allow deferred payments for two to three years. It is unclear if any debt will be forgiven, and how much credit and inputs may be available. Because of pest issues in MY 2017/18, cotton producers are also allegedly urging ginning companies to distribute Bt cotton seeds to help control the cotton bollworm pest.

Burkina Faso

Production

For MY 2018/19 (August to July), area is forecast at 800 HA, down six percent on expectations that credit may be limited for farmers. Many producers are reportedly in default and unable to pay loans for the last crop season, which may bar them from accessing financing for this season. MY 2018/19 production is estimated at 1.39 million lb. 480 bales assuming good weather and sufficient supplies of pesticide to control cotton pests, which were lacking during the last crop season.

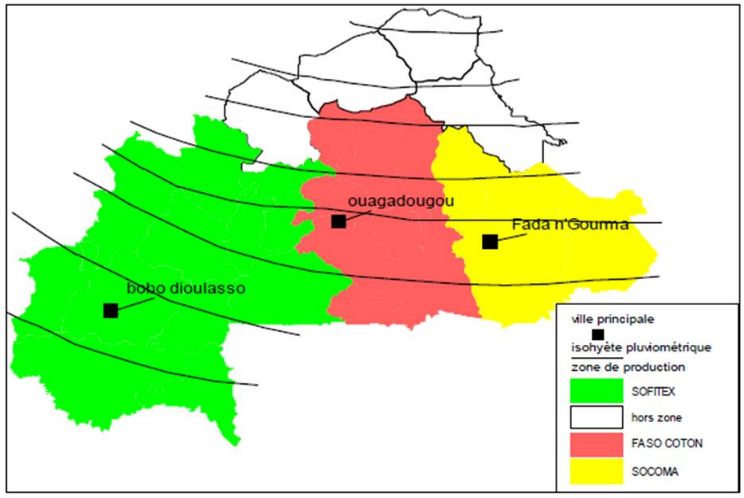

Cotton worker, Bobo-Dioulasso
Source: FAS/Dakar

MY 2017/18 area and production are unchanged at 850,000 HA and 1.3 million 480 lb. bales. Production was significantly affected by pests and drought. For more information, please see the August 2017 Cotton Update and the November 2017 Cotton Update and Biotechnology Annual.

Collection and Grading

Although cotton seed varieties have improved, little has changed in production techniques since Burkina Faso started producing cotton in 1924. Seed cotton production in Burkina Faso remains extremely labor intensive with virtually no mechanization, and is primarily produced by smallholder farmers. The average farm size is 3.9 HA. According to the FAO, today around four million Burkinabe (22 percent of the population) support themselves through activities connected to the cotton sector.

Figure 1. Burkina Faso: Cotton Production Zones



Source : SOFITEX

Cotton production occurs in three zones, western, eastern, and central, each managed by a cotton ginning mill company: The Société Burkinabe des Fibres Textiles (SOFITEX), FasoCoton, and the Société Cotonnière du Gourma (SOCOMA), respectively. Each mill distributes inputs into its respective zone, and farmers repay the mill for the inputs after the harvest is collected. The ginning mill companies typically collect cotton in their respective zones until March. SOFITEX is by far the largest ginning mill company, representing about 80 percent of total production. It owns 16 ginning facilities (15 for ginning cotton and one for ginning delinted seed), including Bobo III, Burkina Faso’s largest capacity ginning facility located in Bobo-Dioulasso. Bobo III can gin 500 MT of seed cotton per day, which produces between 900 and 1,000 480 lb. bales of cotton lint.

Cotton growers are organized into credit groups that bring their seed cotton to designated outdoor roadside collection points where a ginning mill truck will transport the product to the closest ginning facility. Each farmer’s pile is weighed so the group knows what portion of the total proceeds each farmer should receive. The ginning companies have up to 20 days to pay farmers after the seed cotton is collected.

Roadside seed cotton collection point, Bobo-Dioulasso
Source: FAS/Dakar

All three cotton mills grade their cotton at the only cotton classification lab in the country located at Bobo III. It is also the only cotton classification lab in Africa with accreditation from the French Committee for Accreditation (COFRAC) which is renewed every five years.

The lab has:

- a pre-conditioning room that can accommodate about 20,000 samples, which is more than one and a half times the total daily production of all three cotton mills in Burkina Faso (SOFITEX, SOCOMA and FASO COTTON);

- a commercial grading room for manual and visual analysis equipped with two lighting ramps above four tables;

- a room for technological analysis with modular climate panels that provide thermal insulation. It is equipped with: two High Volume Instrument (HVI) chains, two portable micronaires, a thermodetector (sticky cotton detector), and various observation and measurement devices (microscope, hygrometers and moisture meters).

Cotton classification lab, Bobo III, Bobo-Dioulasso
Source: FAS/Dakar and SOFITEX

There are 14 grades of cotton fiber in Burkina Faso. The highest grade cotton can be categorized into four classifications: Boby S, Bola S, Boby, and Bola. This classification is based on equivalency criteria defined by African industry standards (see Table 2. West Africa: Equivalency of Cotton Fiber Grades by Country). About 96 percent of Burkina Faso's cotton is classified as Boby/S and Bola/S, the two highest grades. The cotton grading process is carried out using manual and visual analysis. The grading is done bale-to-bale by a team of experts who determine the fiber length, grade and aesthetic quality. Post contacts report that there is a differential of 10 francs ($0.01) between grades on the international market.

Table 1. Burkina Faso: Cotton Grades

	Grades	White Cotton		Grades	Cream-Colored Cotton
High Grade	Boby/S (highest)	White, shiny, few impurities, well processed		Bola/S	Cream-colored cotton, shiny, few impurities, well processed
	Boby	White, less shiny, some leaves, well or medium processed		Bola	Cream-colored, less shiny, some leaves, well or medium processed
Medium Grade	Toma	White to slightly dull, contains leaves, medium processed		Rudy	Cream-colored, some stains, contains leaves, medium processed
	Vota	Dull white to slightly grayish, more leaves than Toma, medium processed		Viva	More cream-colored, more leaves than Rudy, stained, medium processed
Low Grade	Bufa	Grayish or mottled color, more leaves than Vota, processed		Babu	More colored and dull than Viva, more leaves, processed
	Bobo3	Dull, mottled color, many leaves, processed		Bobo/4	Heavily stained yellow, a lot of foreign matter, processed

Source : SOFITEX

Table 2. West Africa: Equivalency of Cotton Fiber Grades by Country

Standards		**Burkina**	**Mali**	**Senegal**	**Chad**
STANDARD 0	**01**	BOBY/S		SIGAL/S	KERO
	02		SARAMA		ZERO EXTRA
	03	BOLA/S	JULI/S		ROKE
	04		NERE		
STANDARD 1	**01**	TOMA		SIGAL	KARA- BAJA
	02	BOBY	JULI		
	03				RAKA
	04				
STANDARD 2	**01**	TOMA		TAMA	BAPO-KAPO
	02	VOTA	KATI	SAVAL	
	03	RUDY	KATI/C	MAKO	POBA-POKA
	04				
STANDARD 3	**01**		LIBA	SEVE	BOKE-POKE
	02	VIVA/RADA	LIBA/C		
	03	BUFA	KOLA		KEBO-KEKO
	04				
STANDARD 4	**01**	BOBO/3	BATA		
	02	BABU			
	03				
	04	BOBO/4			

Source : SOFITEX

Consumption and Value Added Cotton

For MY 2018/19, Post forecasts domestic consumption will remain at 25,000 480 lb. bales, unchanged from the previous year on steady domestic demand. MY 2017/18 domestic consumption remains unchanged at 25,000 480 lb. bales.

Only five percent of the cotton fiber produced in Burkina Faso is processed into yarn. Cotton seed is processed into oil and delinted seeds. Burkina Faso has 150 cotton seed oil factories, but only 80 comply with CODEX guidelines. Burkina Faso has only one spinning mill, FILSAH, which produces 5,000 MT of yarn per year. According to contacts, high production costs and electricity shortages are the biggest challenges to expanding domestic yarn production. Forty-percent of this yarn is sold locally to produce artisanal products; 60-percent is exported to European markets (e.g., Rotterdam, Barcelona, and Hamburg).

Burkina Faso's cotton value chain
Source: Ministry of Commerce

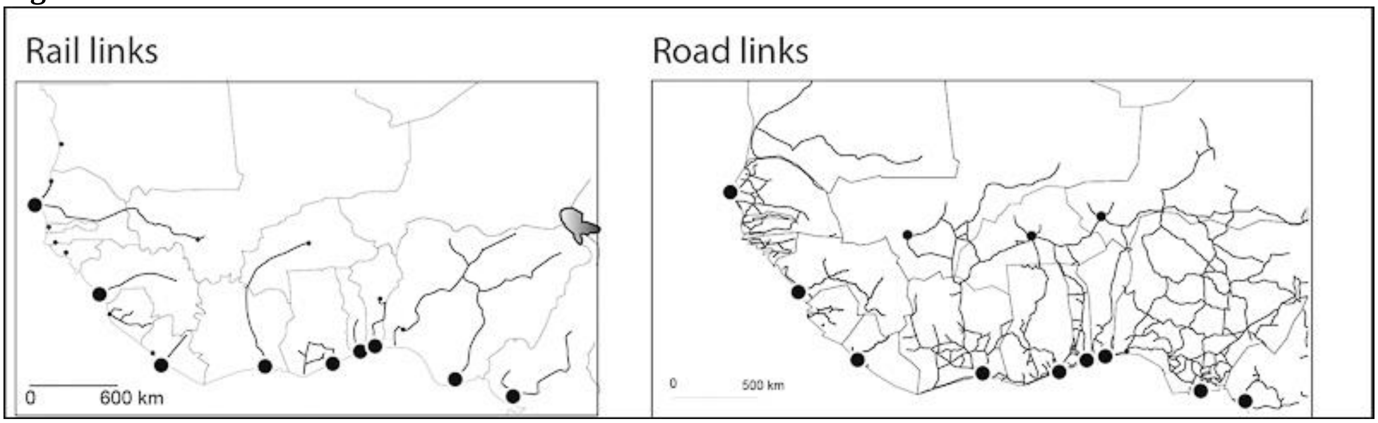
In February, 2018, media sources reported that Burkina Faso plans to open a new textile mill worth 220 billion CFA francs ($366 million). The project is supported by the Government of Burkina Faso and several financial partners (i.e., Afreximbank, the African Development Bank, Bank of Africa, Ecobank and Lilium Capital). It will be led by the Turkish company Ayka Textile which also invested in Ethiopia's largest textile mill. Since reliable energy is a major constraint, a 35-MW coal-fired power plant reportedly will be built next to the new mill, which is expected to be operational by July, 2018.

Trade

For MY 2018/19 cotton exports are forecasted at 1.365 million 480 lb. bales, up seven percent on expectations of strong international demand and higher exportable supplies. MY 2017/18 exports are projected down to 1.27 million 480 lb. bales on lower exportable supplies. MY 2016/17 exports are estimated up seven percent to 1.515 million 480 lb. bales on higher exportable supplies and strong demand.

Post's contacts noted that Vietnam and Bangladesh are large importers of Burkina Faso cotton. In CY 2017, Bangladesh cotton imports from Burkina Faso rose to 523,000 480 lb. bales, more than triple the previous year. Other large importers in CY 2017 included Turkey (150,000 480 lb. bales), India (119,000 480 lb. bales), Egypt (65,000 480 lb. bales), China (46,000 480 lb. bales), and Thailand (19,000 480 lb. bales).

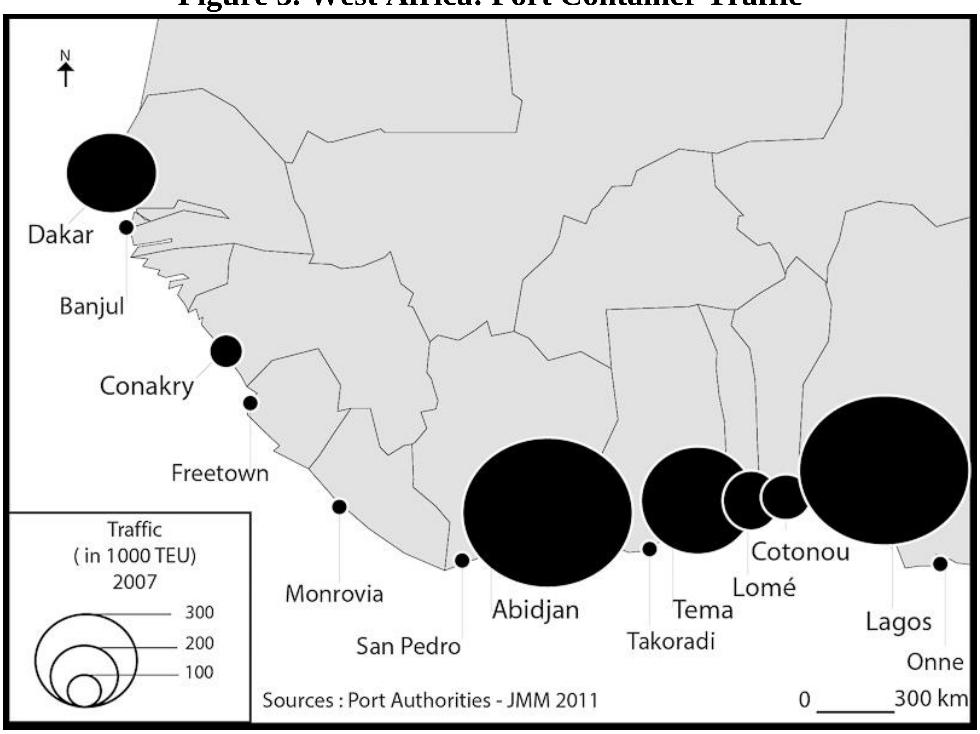
Figure 2. West Africa: Rail Links and Inland Roads



Source: Michelin Map, n°953 – 2007

After the cotton is ginned, the cotton bales are transported directly by truck to the Ports of Lome, Tema and Cotonou, or by rail or truck to Abidjan. Sofitex has its own railway that passes through the Bobo III ginning facility and transports the cotton fiber to the Port of Abidjan. According to the OECD, about 60 percent of Burkina Faso's exports and imports are transported along this 780-mile railway to Abidjan as it is the least costly means of inland transport, though it is subject to disruptions. Over 900,000 tons of freight are transported along this rail every year, much of it cotton. For more information on other West African ports, please see [FAS Accra 2018 Cotton Annual](#).

Figure 3. West Africa: Port Container Traffic



Source: Containerisation International, 2011.

Stocks

Post estimates MY 2018/19 stocks at 10,000 480 lb. bales, unchanged from last year. Burkina Faso's two largest ginning mills both noted that traders purchase all of the cotton produced each year and none is stored in country. One ginning mill company reported it does not keep any stocks on hand, and only stores about 500 MT of cotton lint in a warehouse at the seaport in Abidjan in case damaged cotton needs to be replaced before being loaded onto ships.

Policy

Post contacts noted that production dropped last season because of pests (please see the August 2017 Cotton Update and the November 2017 Cotton Update); because of low production farmers reportedly are unable to pay back loans provided by cotton ginning companies. The union of cotton farmers requested that the ginning companies reduce the remaining debt by half and allow deferred payments for two to three years. It is unclear if any debt will be forgiven, and how much credit and inputs may be available for MY 2018/2019.

According to contacts, there is still demand for Bt cotton seeds. From MY 2009/10 to MY 2015/16, Bt cotton seeds were distributed in Burkina Faso. In MY 2016/17, Burkina Faso stopped distributing Bt cotton seeds developed by Monsanto due to issues with cotton fiber length (see FAS/Dakar's Biotechnology Annual). However, because of pest issues in MY 2017/18 (please see the August 2017 Cotton Update and the November 2017 Cotton Update), cotton producers are now allegedly urging ginning companies to distribute Bt cotton seeds to help control the cotton bollworm pest.

According to the FAO, to cultivate conventional cotton, Burkina Faso's cotton sector spends roughly $60 million per year in pesticides. Six to as many as ten sprayings are required, and even with proper treatment yield losses often surpass 30 percent. When Bt cotton was planted, its yields were reportedly on average 22 percent higher than conventional varieties and earned producers an additional $66 per HA.

To encourage farmers to grow cotton, ginning mill companies offer many services and benefits to cotton producers such as access to inputs (for cotton and food crops) and extension services. Since MY 2016/17, SOFITEX has been experimenting with a crop insurance program called Assurance Récolte Sahel which is funded by the World Bank's *Société Financière Internationale* (SFI) and other local and international organizations. The program is still in its pilot phase in two areas within the SOFITEX cotton zone, but the program will be expanded to all three cotton zones after it rolls out. According to contacts, the crop insurance project has been extended to grains. Starting in MY 2018/19, SOCOMA, Burkina Faso's second largest ginning mill company, will offer life insurance to cotton producers from 18-80 years of age. In the event that the policyholder dies or becomes incapacitated, 200,000 CFA francs ($363.6) per HA will be paid out to designated family members. The cost for coverage per season is only 1,000 CFA francs ($1.81) per HA.

Besides crop insurance, SOFITEX is also experimenting with irrigation. Currently, pilot irrigation systems are being financed by SOFITEX (80 percent) and participating farmers (20 percent). However, they are still undecided about which material to use: clay, waterproof tarpaulin, or cement. Regarding financing, SOFITEX negotiated an agreement on January 12, 2018 in Paris with a pool of international banks for 65 million Euros ($77.5 million), which allegedly will be repaid over 12 months at a rate of 3.7 percent.

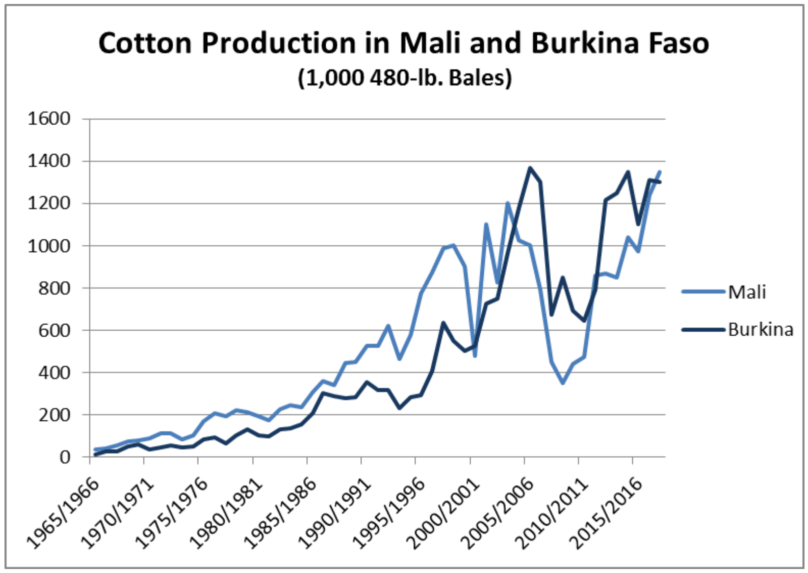
Mali, Chad, and Senegal

Mali

Production

MY 2018/19 area is forecast to increase to 740,000 HA on expectations of high prices that may influence farmer planting decisions. MY 2018/19 production is estimated at 1.370 million 480 lb. bales assuming good weather. MY 2017/18 cotton area and production levels remain unchanged at 730,000 HA and 1.35 million 480 lb. bales, respectively.

Figure 4. Mali: Cotton Production Surpasses Burkina



Source: PSD Online

Consumption and Value Added Cotton

Bogolan handwoven cloth
Source: https://nofi.fr/2017/10/bogolan/43650

MY 2018/19 consumption is forecast at 25,000 480 lb. bales, unchanged from last year. Approximately 98 percent of Mali's cotton production is exported and only two percent remains in country for processing into artisanal weaving yarns (unbleached, white, and dyed thread) and printed fabrics (bogolan fabrics, woven cloth, and woven koba).

Trade

For MY 2018/19, Malian exports are projected at 1.345 million 480 lb. bales, a two percent increase from the previous year on expectations of strong international demand. MY 2017/18 exports are estimated at 1.325 million on higher exportable supplies and strong international demand.

In CY 2017, Bangladesh imported 623,000 480 lb. bales from Mali. Other large importers include India (167,000 480 lb. bales), Thailand (85,000 480 lb. bales), Turkey (75,000 480 lb. bales), and Portugal (11,550 480 lb. bales).

In Mali, ginning begins around mid-October. In November/December ginning mill companies start transporting cotton bales by road to the Port of Dakar in Senegal (60-percent), and the Ports of Abidjan San Pedro in Cote d'Ivoire (40-percent). In the past, cotton was transported by railway from Kita in Mali to the Port of Dakar, but this railway has not been operational for the past two years.

Stocks

MY 2018/19 stocks are forecast at 5,000 480 lb. bales, unchanged from last year. Contacts have noted no stocks remain in country after ginning.

Chad

Production

MY 2018/19 area is forecast down seven percent to 110,000 HA on expectations that producers will decide to grow other crops or find off-farm employment since COTONTCHAD, the national ginning mill company, has been financially unstable and unable to fulfill its contracts and distribute inputs. MY 2018/19 seed cotton production is forecast to decrease six percent from the previous season to 58,000 480 lb. bales on expectations of lower area and a lack of inputs. MY 2017/18 area and production levels are estimated down approximately 63 and 30 percent to 118 HA and 62,000 480 lb. bales due to a lack of inputs, drought, and flooding. For more details see the previous Cotton Update.

Trade

MY 2018/19 exports are projected at 70,000 480 lb. bales, down 30 percent because of lower exportable supplies. MY 2017/18 exports are estimated up from the last update to 100,000 480 lb. bales due to high exportable supplies and strong international demand. In CY 2017, Chad's cotton exports to Bangladesh dropped by almost 30 percent to 160,000 480 lb. bales.

Stocks

MY 2018/19, are forecast at 26,000 480 lb. bales, unchanged from last year. Contacts have noted no stocks remain in country after ginning.

Senegal

Production

MY 2018/19 cotton area is forecast to increase 25 percent to 25,000 HA on expectations of relatively more competitive prices in comparison to peanuts. Last year, most farmers could not sell peanuts because of low international prices. MY 2018/19 cotton production is projected to increase 30 percent to 43,000 480 lb. bales assuming good weather.

MY 2017/18 area is estimated up slightly to 20,000 HA on official government data. MY 2017/18 production is estimated down slightly to 33,000 480 lb. bales on official government data and drought that affected 17 percent of total area (mainly in the region of Kolda).

Consumption and Value Added Cotton

MY 2018/19 consumption is forecast at 2,000 480 lb. bales, unchanged from last year. Approximately two percent of Senegal's cotton is processed in country to make traditional weaving cloth, about half of which goes to a large textile mill (NSTS-FIT) located near Dakar which reopened in 2015.

Trade

For MY 2018/19, Senegal exports are projected to increase 33 percent to 40,000 480 lb. bales on expectations of strong international demand. MY 2017/18 exports are estimated down slightly to 30,000 480 lb. bales on low exportable supplies. Ginning occurs from December to March. Cotton bales are transported from the southeastern region of Senegal, where the ginning mill companies are located, by truck to the Port of Dakar.

Table 3. West Africa: Fixed Farm Gate Prices for First Quality Cotton

(CFA francs)	Official 2015/16 Farm Gate Price	Official 2016/17 Farm Gate Price	Official 2017/18 Farm Gate Price	Official 2018/19 Farm Gate Price
Burkina Faso	235 ($0.44)	235 ($0.44)	245 ($0.40)	TBA
Mali	237.5 ($0.44)	250 ($ 0.47)	250 ($0.47)	TBA
Chad	240 ($0.45)	220 ($0.42)	N/A	TBA
Senegal	255 ($0.48)	255 ($0.48)	300 ($0.57)	TBA

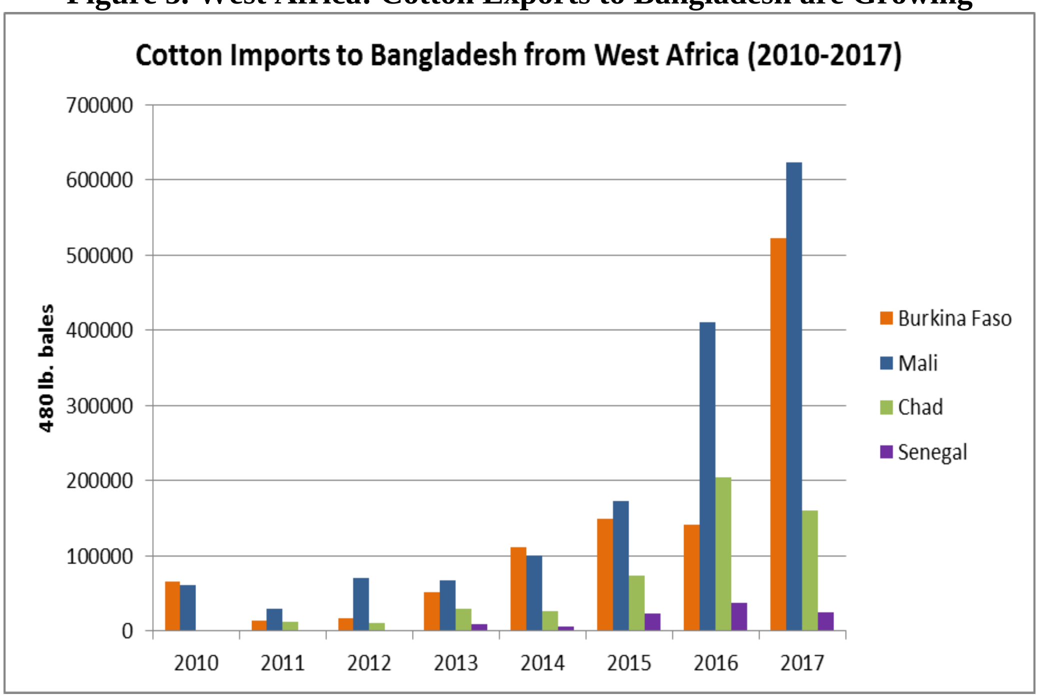
Source: Official sources; **$1= 530 CFA francs; CFA francs per KG**

Table 4. West Africa: Pricing for Subsidized Fertilizer and Urea

(CFA francs)	Official 2015/16 Input Prices	Official 2016/17 Input Prices	Official 2017/18 Input Prices	Official 2018/19 Input Prices
Burkina Faso	Fertilizer: 15,000 ($28.3) Urea: 15,000 ($28.3)	Fertilizer: 15,000 ($28.3) Urea: 15,000 (($28.3))	Fertilizer: 15,000 ($28.3) Urea: 15,000 (($28.3))	TBA
Mali	Fertilizer: 11,000 ($20.75) Urea: 11,000 ($20.75)	Fertilizer: 11,000 ($20.75) Urea: 11,000 ($20.75)	Fertilizer: 11,000 ($20.75) Urea: 11,000 ($20.75)	TBA
Chad	Fertilizer: 16,000 ($30.19) Urea: 15,000 ($28.3)	Fertilizer: 16,000 ($30.19) Urea: 15,000 ($28.3)	N/A	TBA
Senegal	Fertilizer: 11,880 ($22.42) Urea: 9,500 ($6.60)	Fertilizer: 11,880 ($22.42) Urea: 9,500 ($6.60)	Fertilizer: 16,038 ($30.26) Urea: 12,132 ($22.89)	TBA

Source: Official sources; **$1= 530 CFA francs; CFA francs per KG**

Figure 5. West Africa: Cotton Exports to Bangladesh are Growing



Source: FAS/Dhaka

Production, Supply and Demand Data Statistics (1000 Hectares (HA), 1,000 480 lb. Bales, PERCENT, KG/HA)

Cotton	2016/2017		2017/2018		2018/2019	
Market Begin Year	Aug 2016		Aug 2017		Aug 2018	
Burkina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	700	700	850	850	0	800
Beginning Stocks	240	240	475	10	0	10
Production	1310	1310	1300	1300	0	1390
Imports	0	0	0	0	0	0
MY Imports from U.S.	0	0	0	0	0	0
Total Supply	1550	1550	1775	1310	0	1400
Exports	1050	1515	1100	1275	0	1365
Use	25	25	25	25	0	25
Loss	0	0	0	0	0	0
Total Dom. Cons.	25	25	25	25	0	25
Ending Stocks	475	10	650	10	0	10
Total Distribution	1550	1550	1775	1310	0	1400
Stock to Use %	44.19	0.65	57.78	0.77	0	0.72
Yield	407	407	333	333	0	378
(1000 HA) ,1000 480 lb. Bales ,(PERCENT) ,(KG/HA)						

Cotton	2016/2017		2017/2018		2018/2019	
Market Begin Year	Aug 2016		Aug 2017		Aug 2018	
Mali	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	655	655	730	730	0	740
Beginning Stocks	386	386	501	5	0	5
Production	1240	1240	1350	1350	0	1370
Imports	0	0	0	0	0	0
MY Imports from U.S.	0	0	0	0	0	0
Total Supply	1626	1626	1851	1355	0	1375
Exports	1100	1595	1100	1325	0	1345
Use	25	25	25	25	0	25
Loss	0	0	0	0	0	0
Total Dom. Cons.	25	25	25	25	0	25
Ending Stocks	501	5	726	5	0	5
Total Distribution	1626	1625	1851	1355	0	1375
Stock to Use %	44.53	0.31	64.53	0.37	0	0.36
Yield	412	412	403	403	0	403
(1000 HA) ,1000 480 lb. Bales ,(PERCENT) ,(KG/HA)						

Cotton	2016/2017		2017/2018		2018/2019	
Market Begin Year	Aug 2016		Aug 2017		Aug 2018	
Chad	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	315	315	120	118	0	110
Beginning Stocks	56	56	96	96	0	48
Production	350	350	120	62	0	58
Imports	0	0	0	0	0	0
MY Imports from U.S.	0	0	0	0	0	0
Total Supply	406	406	216	158	0	106
Exports	300	300	130	100	0	70
Use	10	10	10	10	0	10
Loss	0	0	0	0	0	0
Total Dom. Cons.	10	10	10	10	0	10
Ending Stocks	96	96	76	48	0	26
Total Distribution	406	406	216	158	0	106
Stock to Use %	30.97	30.97	54.29	43.64	0	32.5
Yield	242	242	218	114	0	115
(1000 HA) ,1000 480 lb. Bales ,(PERCENT) ,(KG/HA)						

Cotton	2016/2017		2017/2018		2018/2019	
Market Begin Year	Aug 2016		Aug 2017		Aug 2018	
Senegal	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	0	0	0	0	0
Area Harvested	20	20	19	20	0	25
Beginning Stocks	11	11	7	7	0	8
Production	28	28	36	33	0	43
Imports	0	0	0	0	0	0
MY Imports from U.S.	0	0	0	0	0	0
Total Supply	39	39	43	40	0	51
Exports	30	30	30	30	0	40
Use	2	2	2	2	0	2
Loss	0	0	0	0	0	0
Total Dom. Cons.	2	2	2	2	0	2
Ending Stocks	7	7	11	8	0	9
Total Distribution	39	39	43	40	0	51
Stock to Use %	21.88	21.88	34.38	25	0	21.43
Yield	305	305	413	359	0	374
(1000 HA) ,1000 480 lb. Bales ,(PERCENT) ,(KG/HA)						