MINUTES OF THE FIRST MEETING OF CONSULTATIVE COMMITTEE OF COTTON ADVISORY BOARD HELD ON 12.12.2017 FOR THE COTTON SEASON 2017-18 IN THE CONFERENCE HALL OF OFFICE OF THE TEXTILE COMMISSIONER, MUMBAI-400 020.

1. The First meeting of Consultative Committee of Cotton Advisory Board (CAB) for the Cotton Season 2017-18 was held under the Chairpersonship of Dr. Kavita Gupta, Textile Commissioner on 12.12.2017 (Tuesday) at 11.00 AM in the Conference Hall of Office of the Textile Commissioner, Mumbai-20.

The list of participants of the meeting is at **Annexure-I**.

- 1.1 At the outset, the Chairperson extended a warm welcome to all the members. Shri Sushil Gaikwad, Director (Cotton), Ministry of Textiles, Govt. of India, New Delhi, has also attended the meeting. The Chairperson informed that Consultative Committee is meeting first time in the current cotton season 2017-18.
- 1.2 Thereafter, the Chairperson initiated agenda for discussion.

2. **AGENDA ITEM NO.1**

<u>CONFIRMATION OF MINUTES OF THE SECOND MEETING OF CONSULTATIVE</u> COMMITTEE OF CAB HELD ON 18.08.2018.

2.1 It was informed that no comments were received from any of the members. Therefore, the Consultative Committee of CAB confirmed the Minutes of the Meeting held on 18.08.2017.

3. **AGENDA ITEM NO.2**

PRICE TREND

3.1 MINIMUM SUPPORT PRICE FOR 2017-18 COTTON SEASON:

It was apprised the members about announcement of the Minimum Support Price (MSP) for the cotton season 2017-18 by the Government and fixation of MSP for other classes of seedcotton.

3.2 Kapas price:

The CMD, Cotton Corporation of India Ltd. (CCI) gave a brief review on the kapas prices and informed that average opening kapas prices for cotton season 2017-18 were lower by 6% to 12% as compared to average opening kapas prices of previous year. She added that since beginning of cotton season, average kapas prices of FAQ grade are ruling above MSP in all the cotton growing states except Southern States and remote centers in Central States where kapas prices are ruling near to MSP. Besides this, Government of Gujarat has declared a bonus of Rs. 500/- per quintal of kapas over and above the MSP fixed by the Government of India. CCI started procurement under MSP Operation w.e.f. 23.10.2017 and as on 07.12.2017, CCI has procured around 3.50 lakh bales under MSP operation.

She further informed that as on 07.12.2017, progressive kapas arrivals for 2017-18 are reported at 74.23 lakh bales, which are around 34% more than the arrivals (i.e. 55.20 lakh bales) during the same period last year.

3.3 Cotton Lint Price:

The President, CAI informed that the cotton lint prices during the first two months of cotton season 2017-18 were lower than those of the cotton season 2016-17. He added that the monthly average prices during the period from 01.10.2017 to 30.11.2017 in case of Punjab, Haryana and Rajasthan growths (26 mm length, 3.5 - 4.9 micronaire) were lower by 5.42%, Maharashtra, Madhya Pradesh and Andhra Pradesh growths (28 mm length, 3.5 - 4.9 micronaire) were lower by 5.53 %, Gujarat growths (29 mm length, 3.5 - 4.9 micronaire) were lower by 5.31%, long staple growth (31mm length, 3.5 - 4.9 micronaire) were lower by 3.60% and DCH-32 growths (34 mm length, 3.0 - 3.8 micronaire) were lower by 6.37% respectively vis-a-vis those prevailing during the same period last year.

He further informed that the decrease in two months average cotton prices for the months of October, 2017 to November, 2017 compared to the corresponding average prices for the said months during 2016-17 cotton season was within the range of 3.60% to 6.37%.

The Consultative Committee took note of the International Cotton Scenario as provided in the agenda.

4. **AGENDA ITEM NO.3**

PRESENTATION ON METHODOLOGY ADOPTED BY MEMBERS AGENCIES IN DRIVING PRODUCTION, CONSUMPTION, IMPORT AND EXPORT ESTIMATES OF COTTON.

Methodology adopted by the Cotton Association of India (CAI), Confederation of Indian Textile Industry (CITI), Directorate of Cotton Development (DCD), the Cotton Corporation of India Ltd. (CCI), Indian Cotton Federation (ICF), Indian Cotton Association Ltd. (ICAL), Economics & Statistics Branch, Office of the Textile Commissioner and Directorate General of Commercial Intelligence & Statistics (DGCI&S) in deriving production, import, export and consumption estimates of cotton as presented/received, in brief, from these member agencies is given below:

(a) Production:

(i) Cotton Association of India (CAI):

The President, CAI said that basic approach and method of CAI has been on the basis of detailed reports at ground level, their upcountry cotton trade associations and leading merchants.

CAI starts estimating crop for the new season from the month of July of the previous crop year. In the initial months of the cotton crop year i.e., from the month of July to October, the CAI utilised an arithmetic model to arrive at cotton crop numbers giving more weightage to using historical data relating to the acreage under cotton and the yield of analogue years to be identified on the basis of similar monsoon pattern. Subsequently, the CAI starts providing weightage to the other factors viz., rainfall and other climatic conditions, insect-pest incidence and arrival figures for the purpose of arriving at cotton crop numbers.

At the end of the year, CAI collects arrival figures and pressing figures from various States and reconciles the crop numbers.

(ii) Confederation of Indian Textile Industry (CITI):

The Past Chairman, CITI said that there are several member mills of CITI in various regions which have arrangements for regular collection of production data on cotton not only from the areas around the mills themselves but also on a country-wide basis as they are in constant touch with the cotton traders and farmers. He added that since the information is collected from mills which are large consumer of cotton and have their own staff deployed for collection of data on a regular basis, it can be seen that CITI's estimate are by and large very near to the CAB estimates.

(iii) The Cotton Corporation of India Ltd. (CCI):

The CMD-CCI said that CCI is undertaking crop surveillance through its wide network of more than 300 procurement centres under the jurisdictions of its 17 procurement/sales branch offices all across cotton growing states in the country. The field survey for cotton crop estimation is undertaken by the field officials.

CCI has appointed Centres In-charge/field officials on its procurement centres who remain in the field/ Agricultural Market Committee's Yards/ Mandis under their jurisdiction and keep close watch on crop position and daily kapas arrivals. These centres In-charge submit the surveillance report on crop condition and arrival position including variety wise kapas prices under their jurisdiction to its reporting Branch Office. Branch Offices, while compiling the field report data on cotton crop received from field officials, also take into accounts the feedback received from trade sources and State Agriculture Department on weekly basis. Thereafter, Branch Offices submit the branch-wise weekly crop surveillance report to Corporate Office of CCI.

Corporate office, compile branch-wise, State-wise crop estimation data on cotton crop and arrives at estimated area and cotton production in the Country.

In order to ascertain scientific and realistic data on area under Cotton, Yield & Production, CCI is also coordinating with ISRO for implementation of their satellite based cotton crop assessment system. CCI field officials are submitting real time data to ISRO through their Mobile App. This project is under process for trial at all the cotton growing States.

After the season is over, the final crop is assessed on the basis of actual pressing figures taken factory-wise and by applying the correction factor on the basis of average weight of the bales reported by each factory.

(iv) <u>Directorate of Cotton Development (DCD):</u>

The Joint Director, DCD said that the cotton production estimates are formulated on the basis of Crop Cutting Experiments (CCEs).

To conduct these CCEs, cotton growing villages are selected randomly. Agricultural Development Officers / Officials of the concerned district village, selects plot of the experimental crop in each selected village with the cooperation of concerned Patwari of Revenue Department and send the CCE results with complete details to the Head Office. Afterwards, at the time of picking, concerned Agricultural Development Officer / Official collects the yield results of pickings and send it to the Head Office.

Afterwards, Block-wise/ Tehsil-wise/ District-wise and State level cotton yield is calculated. Accordingly, the area of crop is multiplied to the concerned yield to calculate its production.

(v) <u>Indian Cotton Federation (ICF):</u>

As per the information provided by ICF, State – wise contacts with the farmers and Taluk level officials are being explored to get the feedback of the position of cotton crop from sowing to harvesting level. This includes cotton seed suppliers, farmers group, traders and brokers. Agro-climatic conditions in regional level also being examined.

Finally, the Sub-Committee on cotton of ICF discuss and finalise the cotton crop estimate from time to time.

(vi) Indian Cotton Association Ltd. (ICAL):

As per the information provided by ICAL, the information on cotton sowing data is collected from Director, Agriculture in each State, District Agriculture officer in all districts, seed manufacturing companies and farmers in selected areas through survey.

For collection of production data, ICAL team interact with all Ginning factories in Northern States on every month end and collect data of kapas arrival, number of bales pressed and un-ginned kapas in their factory for respective month. ICAL also collects information from State Revenue and Agriculture Department regarding production of cotton in their State.

The Chairperson observed that there is a wide gap and variation between Directorate of Economics & Statistics (DES), Ministry of Agriculture and trade estimates of cotton production.

After detailed deliberations, the Chairperson emphasised a greater need for developing a more scientific models for estimating cotton production. The Chairperson requested all the member agencies to evolve a scientific and precise methodology themselves to determine production of cotton. For this, they may form Sub-Committees and evolve precise methodology and also present the same in the next Consultative Committee meeting.

(b) Consumption:

Economics & Statistics Branch of Office of the Textile Commissioner:

It was informed that data on monthly cotton consumption is collected from the mills/ units enlisted with the Office of the Textile Commissioner through statistical return M02. The data is available with a lag of 45 days from the reference month. In case of mills / units who have not submitted the returns, the latest available consumption figure is used for imputation. However, as and when the returns from mill are received, the imputed consumption figure for the said mill / unit is replaced by actual value.

Combining the actual and imputed values for reporting and non-reporting units, the total consumption figure is determined. Usually mills/ units submit return within 3-4 months period. The data for a particular reference month gets finalised with lag of 4 months. In the final estimate on an average 25-30% of data is only in respect of estimated mills/units.

(c) Import and Export:

Directorate General of Commercial Intelligence & Statistics (DGCI&S):

The Deputy Director General, DGCI&S, Kolkata, said that they do not make any estimation of import/ export data of cotton, therefore, adopting any methodology thereof does not arise.

She informed that the Directorate receives import and export data at transaction level from the various customs formations of India in electronic mode (also in handwritten format). At the time of compilation of data, the corrections in quantity figures are being done on the basis of information available on the gross weight, article description etc., only for those transactions where the quantity figure is not reported in the prescribed unit of the ITCHS reported upon. On due validation for quantity, the aggregation of transaction level data is done and the same gets published in the web – portal of DGCI&S.

5. **AGENDA ITEM NO.4**

<u>IDENTIFYING AN AGENCY TO UNDERTAKE SURVEY ON CONSUMPTION OF</u> COTTON IN NON – MILL / NON – SSI UNITS AND IN NON – TEXTILE USAGE:

- (i) Estimation of consumption of cotton by textile units which are not covered in the category of Mill and SSI Units and which may include Technical Textile Units etc., and
- (ii) Non-Textile Consumption which includes khadi and village industries, wicks for lamp, temple, mattresses, quilts, pillow, bolsters, etc.

It was informed that the recent survey of loose cotton production and consumption in the country was conducted by the Ahmedabad Textile Industry's Research Association (ATIRA), Ahmedabad, in the year 2010. The said survey was entrusted to ATIRA by the CAB and the Sub-Committee was also constituted. The CCI, CAI and CITI had equally sponsored for the survey.

Shri R.M. Sankar, Assistant Director, ATIRA, gave a brief review on findings of ATIRA's survey conducted, for the reference cotton year 2009-10, on delivery of loose cotton at the production stage, loose cotton and pressed bale consumption by the non-mill sector. The finding of the said survey was accepted by the CAB in 2011. He added that the cost of survey was Rs. 18 lakh and the same was equally paid by CCI, CAI and CITI. He informed that ATIRA had also undertaken the said work in the year 1994, 1997 and 2010.

As per the past precedence, the Chairperson urged the President, CAI, Past Chairman, CITI, and CMD-CCI to jointly bear the expenditure that may be incurred towards the proposed survey to be undertaken.

After detailed deliberations, the Consultative Committee decided to constitute a Sub-Committee under the Chairpersonship of the Textile Commissioner consisting CMD-CCI, Chairman, CITI, President, CAI, President, ICF, Shri Suresh Kotak, Chairman, Kotak Ginning & Pressing Ind. Ltd., President, All Gujarat Cotton Ginning Association, Director, CIRCOT and President, ICAL as its members to finalise the terms of reference for the survey of delivery of loose cotton at the production stage, consumption of cotton in Non – Mill / Non – SSI units and in Non – Textile usage. The Sub – Committee would also monitor the progress at regular intervals. The Consultative Committee identified ATIRA as an agency to whom this work may be entrusted. It was also decided that CAI, CITI and CCI will fully support this study.

6. **AGENDA ITEM NO.5**

COTTON SEASON 2016-17

(i) <u>INPUTS ON ESTIMATION OF STATE-WISE AREA UNDER COTTON AND COTTON PRODUCTION FOR SEASON 2016-17 FOR CAB</u>

(a) <u>RECOMMENDATION FOR ESTIMATION OF STATE-WISE AREA UNDER COTTON CULTIVATION FOR COTTON SEASON 2016-17 TO CAB.</u>

The Joint Director, Directorate of Cotton Development (DCD), Ministry of Agriculture, Government of India, informed that there is no change in the state-wise area under Cotton cultivation for the Cotton season 2016-17. The state-wise break up of area is as detailed below:

(Area in lakh hectares)

Sr. No.	Name of the State	Area estimated by CAB on 18.08.2017	Area recommended to CAB on 12.12.2017	
1.	Punjab	2.85	2.85	
2.	Haryana	5.70	5.70	
3.	Rajasthan	4.71	4.71	
NORT	THERN REGION	13.26	13.26	
4.	Gujarat	24.05	24.05	
5.	Maharashtra	38.00	38.00	
6.	Madhya Pradesh	5.99	5.99	
CEN	TRAL REGION	68.04	68.04	
7.	Telangana	14.09	14.09	
8.	Andhra Pradesh	4.71	4.71	
9.	Karnataka	5.07	5.07	
10.	Tamil Nadu	1.42	1.42	
SOUT	THERN REGION	25.29	25.29	
11.	Odisha	1.36	1.36	
12.	Others	0.50	0.50	
	TOTAL	108.45	108.45	

(b) <u>AGENCY-WISE INPUT ON ESTIMATION OF STATE-WISE COTTON</u> PRODUCTION FOR THE COTTON SEASON 2016-17 FOR CAB

The inputs on estimation of State-wise Cotton production for the Cotton Season 2016-17 furnished by various agencies viz. Directorate of Cotton Development (DOCD), Cotton Association of India (CAI), Confederation of Indian Textile Industry (CITI) and Cotton Corporation of India Ltd. (CCI) are as under:-

(In lakh bales of 170 kg each)

Sr.	Name of the State	CAB estimates on 18.08.2017		Agency-wise input on estimation of production for CAB on 12.12.2017				
No.		Pressed Bales	Loose Cotton	Total	DOCD	CAI	CITI	CCI
1.	Punjab	6.50	2.50	9.00	12.67	8.75	9.00	9.00
2.	Haryana	17.50	3.00	20.50	20.41	20.50	20.50	20.50
3.	Rajasthan	15.40	1.10	16.50	16.10	16.50	16.50	16.50
NORTHERN REGION		39.40	6.60	46.00	49.18	45.75	46.00	46.00
4.	Gujarat	91.80	3.20	95.00	82.20	89.00	95.00	95.00
5.	Maharashtra	82.75	5.75	88.50	106.15	88.00	88.50	88.50
6.	Madhya Pradesh	19.80	0.70	20.50	25.20	20.50	20.50	20.50
CEN	NTRAL REGION	194.35	9.65	204.00	213.55	197.50	204.00	204.00
7.	Telangana	47.40	0.60	48.00	29.34	48.00	48.00	48.00
8.	Andhra Pradesh	13.10	5.90	19.00	16.18	18.50	19.00	19.00
9.	Karnataka	16.90	1.10	18.00	14.35	17.00	18.00	18.00
10.	Tamil Nadu	2.80	2.20	5.00	3.50	5.50	5.00	5.00
SOUTHERN REGION		80.20	9.80	90.00	63.37	89.00	90.00	90.00
11.	Odisha	2.95	0.05	3.00	3.82	3.00	3.00	3.00
12.	Others	2.00		2.00	1.00	2.00	2.00	2.00
TOTAL		318.90	26.10	345.00	330.92	337.25	345.00	345.00

The state wise production estimates are inclusive of loose Cotton.

Since the cotton season 2016-17 has come to an end on 30.09.2017, the Chairperson requested CMD-CCI, the Chairperson of the Sub-Committee on pressed bale data and closing stock of cotton to initiate the work and submit its report on pressed bale data for cotton season 2016-17 and closing stock of cotton as on 30.09.2017 in the next meeting of Consultative Committee.

COTTON SEASON 2017-18

(ii) INPUTS ON ESTIMATION OF STATE-WISE AREA UNDER COTTON AND COTTON PRODUCTION FOR CURRENT COTTON SEASON 2017-18 FOR CAB

(a) <u>RECOMMENDATION</u> FOR <u>ESTIMATION</u> OF <u>STATE-WISE</u> <u>AREA UNDER</u> <u>COTTON CULTIVATION TO CAB.</u>

As per the information made available by the Joint Director, DOCD, area under cotton has been estimated at 122.35 lakh hectares. The state-wise break up of area is as detailed below:

(Area in lakh hectares)

Sr. No.	Name of the State	Area furnished by DOCD on 12.12.2017	Area recommended to CAB on 12.12.2017	
1	Punjab	3.85	3.85	
2	Haryana	6.56	6.56	
3	Rajasthan	5.03	5.03	
ľ	NORTHERN REGION	15.44	15.44	
4	Gujarat	26.18	26.18	
5	Maharashtra	41.98	41.98	
6	Madhya Pradesh	5.99	5.99	
	CENTRAL REGION	74.15	74.15	
7	Telangana	18.24	18.24	
8	Andhra Pradesh	5.44	5.44	
9	Karnataka	5.65	5.65	
10	Tamil Nadu	1.48	1.48	
5	SOUTHERN REGION	30.81	30.81	
11	Odisha	1.45	1.45	
12	Others	0.50	0.50	
	TOTAL	122.35	122.35	

(b) <u>AGENCY-WISE INPUT ON ESTIMATION OF STATE-WISE COTTON</u> PRODUCTION FOR THE CURRENT COTTON SEASON 2017-18 FOR CAB

The Chairperson requested agencies to place their production estimate before the Committee. Accordingly, the inputs on estimation of State-wise Cotton production for the Cotton Season 2017-18 furnished by various agencies viz. Directorate of Cotton Development (DOCD), Cotton Association of India (CAI), Confederation of Indian Textile Industry (CITI), Cotton Corporation of India Ltd (CCI) and Indian Cotton Federation (ICF) are as under:-

(In lakh bales of 170 kg each)

Sr.	Name of the State	Agency-wise input on estimation of production to CAB on 12.12.2017				
No		DOCD	CAI	CITI	CCI	ICF
1.	Punjab	15.83	11.50	12.00	12.00	12.00
2.	Haryana	19.10	24.00	24.00	25.00	23.00
3.	Rajasthan	14.79	19.50	19.00	22.00	21.00
NOF	RTHERN REGION	49.72	55.00	55.00	59.00	56.00
4.	Gujarat	73.60	100.00	105.00	102.00	109.00
5.	Maharashtra	95.20	91.00	90.00	85.00	90.00
6.	Madhya Pradesh	21.28	21.00	20.00	22.00	21.00
CE	NTRAL REGION	190.08	212.00	215.00	209.00	220.00
7	Telangana	38.73	56.00	55.00	57.00	55.00
8.	Andhra Pradesh	18.48	22.00	22.00	22.00	23.00
9.	Karnataka	16.05	20.00	20.00	18.00	22.00
10.	Tamil Nadu	4.41	5.00	5.00	6.00	6.00
SOUTHERN REGION		77.67	103.00	102.00	103.00	106.00
11.	Odisha	4.04	3.00	3.00	3.00	3.00
12.	Others	1.22	2.00	2.00	2.00	2.00
	TOTAL	322.73	375.00	377.00	376.00	387.00

The state-wise production estimates are inclusive of loose Cotton.

(iii) <u>INPUTS ON IMPORT, EXPORT AND CONSUMPTION OF COTTON FOR COTTON</u> SEASON 2016-17 FOR CAB

(a) Input on estimation of Import and Export of cotton

The Directorate General of Commercial Intelligence and Statistics (DGCI & S), Kolkata has furnished the provisional data on Import and Export of Cotton from October, 2016 to September, 2017 as 30.94 lakh bales and 58.21 lakh bales respectively.

(b) Agency-wise input on estimation of Cotton Consumption

The Economics & Statistics Branch of Office of the Textile Commissioner has furnished the provisional consumption data for Non-SSI units and SSI units as 262.66 lakh bales and 26.20 lakh bales respectively for the cotton season 2016-17.

(iv) <u>INPUTS ON IMPORT, EXPORT AND CONSUMPTION OF COTTON FOR CURRENT</u> COTTON SEASON 2017-18 FOR CAB

(a) Agency-wise input on estimation of Import and Export of cotton

The President, CAI opined that the export of cotton for the cotton season 2017-18 would be around 63 lakh bales and Import of cotton would be around 17 lakh bales respectively.

The Past Chairman CITI opined that the export of cotton for the cotton season 2017-18 would be around 60 lakh bales and Import of cotton would be around 15 lakh bales respectively.

(b) Agency-wise input on estimation of Cotton Consumption

The Economics & Statistics Branch of Office of the Textile Commissioner has furnished the provisional consumption data for the month of October, 2017 for Non-SSI units and SSI units as 20.31 lakh bales and 2.11 lakh bales respectively.

The Past Chairman CITI opined that the cotton consumption for 2017-18 would be around 315 lakh bales by the mill sector.

The Chairperson requested the Associations to impress upon their members for mandatory filing of statistical returns in compliance with the Notification No. S.O. 1529(E)/1/CSR/SO.3534(E) dated 26.04.2017 issued by the Textile Commissioner and also to provide the list of members and their e-mails to the Economics & Statistics Branch of Office of the Textile Commissioner for appropriately taking up the matter. She also informed that it would be in the interest of industry to ensure that all the returns are correctly filed since the purpose of the same is to collect statistics of the entire textile industry so that correct policy interventions could be arrived at by the Ministry of Textiles. She added that the purpose of the said exercise is not regulatory in nature and therefore, the units should not hesitate in filing the returns. She further informed that for SSI units, the returns have been adequately simplified so that they are not unduly burdened. The Chairperson also stated that the Act also has penal provisions for the units who default in filing returns. The Chairperson urged all the Associations to make all out efforts and use all the possible resources in improving the reporting of the data by the units and thereby reduce share of estimated value.

7. AGENDA ITEM NO. 6

ANY OTHER MATTER

The meeting, thereafter, ended with a vote of thanks to the Chair.

LIST OF PARTICIPANTS IN THE FIRST MEETING OF CONSULTATIVE COMMITTEE OF COTTON ADVISORY BOARD (CAB) HELD ON 12.12.2017 FOR THE COTTON SEASON 2017-18 IN THE CONFERENCE HALL OF OFFICE OF THE TEXTILE COMMISSIONER, MUMBAI-400 020

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13.	Shri P. R. Shanmugham Joint Secretary, Tamilnadu Spinning Mills Association (TASMA)							
	REPRESENTING	COTTO	N TRADE					
14.	Shri Atul Ganatra President, Cotton Association of India, 2nd Floor, Cotton Exchange Bldg, Cotton Green, Mumbai-400 033. cai@caionline.in; president@caionline.in	15.	Shri Prasad Dhake Assistant Manager, Securities and Exchange Board of India (SEBI), Plot No. C 4-A, G Block, Near Bank of India, Bandra Kurla Complex, Bandra East, Mumbai – 400051 chairman@sebi.gov.in; prasadd@sebi.gov.in					
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Shri A. K. Chowdhury Secretary, All India Cotton Seed Crushers Association (AICOSCA), Khetan Bhavan, 6 th Floor, 198, Jamshed Tata Road, Churchgate, Mumbai-400 020. info@aicosca.com;aicosca1@gmail.com								
	COTTON SEED MANUFACTURER							
Shri Rajendra Barwale, Managing Director, 17. Maharashtra Hybrid Seeds Company Ltd. (MAHYCO), Resham Bhavan, IV Floor, 78, Veer Nariman Road, Mumbai - 400 020. raju.barwale@mahyco.com								

Sr.No	Name & Address	Sr.No	Name & Address				
	MEMBER - SECR	RETARY					
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