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August 2025



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Long staple cotton in 2024/25, and the outlook for 2025/26



Antonia Prescott
Editor
Cotton Outlook

Prices

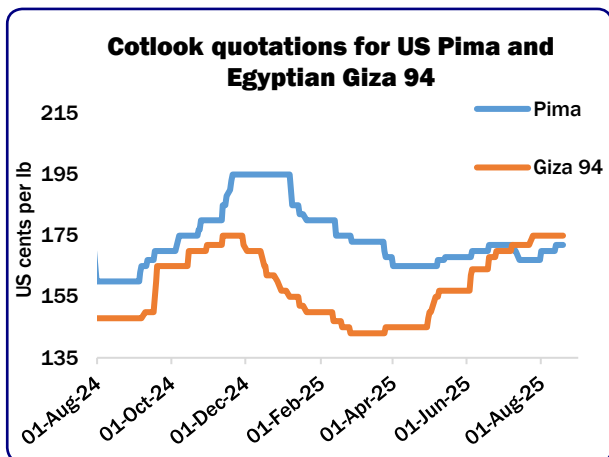
To a large extent, the dynamic observed in the chart for US and Egyptian long staple cotton prices in the 2024/25 season can be traced back to official decisions made in Cairo throughout last year about the operations of the seed cotton auction system that was due to commence in October.

In February 2024, the Egyptian government announced that it would raise the Minimum Guaranteed Prices for seed cotton from the 2024/25 crop sold at auction to E£12,000 per kantar for long staple varieties grown in the Nile Delta, including Giza 94, and E£10,000 per kantar for Upper Egypt varieties (principally Giza 95). These rates represented an increase of more than 100 percent from the prices imposed during the 2023/24 auction series. Stakeholders complained that these minimum values threatened the viability of spinning and

trading operations, and merchants indicated that they might not participate in the auctions, given that international customers would be unlikely to accept the consequent prices.

A process of negotiation then ensued as the trade proposed various support measures that might accompany the Minimum Price System and mitigate the impact of the increase. However, in the interim, most private companies declined to take part in the auctions until the matter had been settled, and the resulting uncertainty accounts for the price rises for both Giza and Pima cotton between September and November. Essentially, a steady supply of Egyptian cotton to the international market could not be guaranteed in the early part of the season, as traders might not have had anything to sell once carry-over stocks were exhausted, and so prices for those supplies that were available,

as well as competing Pima stocks which stood to benefit from a potential gap in supply from Egypt, rose substantially.



Cotlook’s quotation for Giza 94 increased from 148 cents per lb at the start of the Egyptian cotton season on September 1 to 175 cents per lb in November. Pima (Grade 2, 1-7/16”, CFR Far East) rose from 160 to 195 cents in the same timeframe.

Eventually, in December, the Egyptian government agreed to reduce the Minimum Prices by E£2,000 a kantar, having also reaffirmed its commitment to pay for and take possession of any seed cotton that remained unsold at the end of the process.

By late February 2025, a total of 1.54 million kantars had been offered at auction, of which around 460,000 went unsold and were acquired by the Finance Ministry. The bulk was bought by private traders and the publicly owned Misr Cotton Trading and Ginning Company.

However, once the market had been assured of a continuous supply from Egypt, the familiar problem of underwhelming downstream demand then reasserted itself as the prevailing influence over prices. Between late 2024 and March/April 2025, the prices for both the principal exported LS growths succumbed to this pressure.

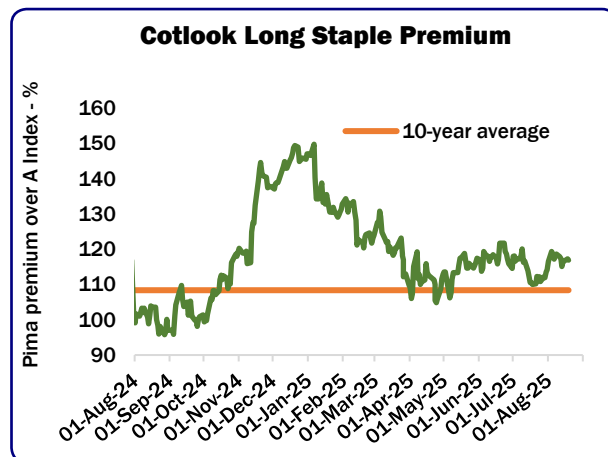
In late spring, though, expectations of reduced planted area for long staples in the US and Egypt began to circulate. USDA’s end of March Prospective Planting report indicated a Pima area of 157,000 acres, down

24 percent from 2024. Meanwhile, many Egyptian farmers were dissatisfied with the auction process in 2024/25, since, despite the generous prices on offer, payments had been slow to reach producers. Therefore, a diversion of land to other crops in the 2025 planting campaign seemed likely. Once again, the prospect of reduced supply was the spur for prices to change direction. Pima quotations rose relatively gently, but the increase for Giza 94 has been much more marked, from 143 cents per lb in mid-March (at which point it stood at a 30-cent discount in relation to Pima) to 175 cents per lb in mid-August (having overtaken Pima for the first time in recent memory).

The increase in the value of the Egyptian variety has been enhanced by virtue of the fact that so much of the season’s supply was controlled by the government. Stocks in the hands of private traders dwindled to less than 10,000 tonnes, and the price reacted accordingly.

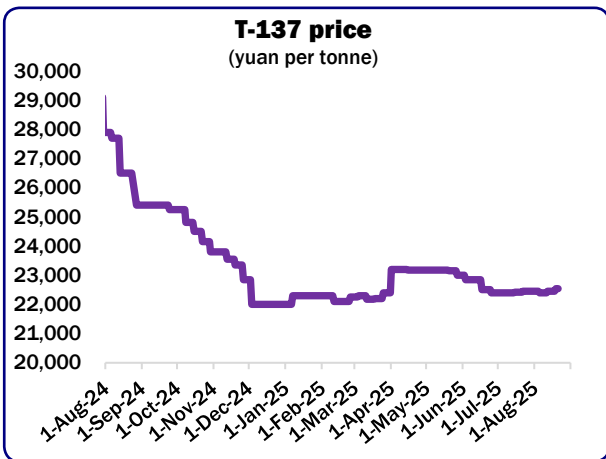
The escalation of the trade war between the US and China has been another disruptive factor in long staple trade this season. The retaliatory duty placed by Beijing on supplies of Pima (along with all other US imports) has fluctuated substantially since March and stands – at the time of writing – at 10 percent. This disincentive to Chinese buyers has also contributed to the relative weakness of prices for Pima compared to Giza 94.

Over the course of the 2024/25 season, the Cotlook Long Staple premium (which tracks the relationship between Pima and upland values, measured by the Cotlook A Index) has fluctuated either side of the 10-year average.



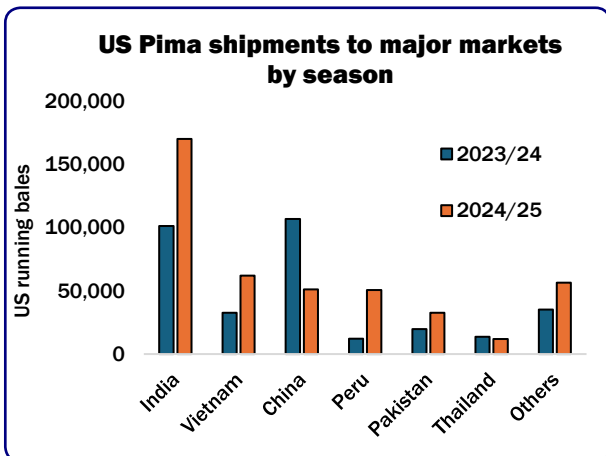
The low for the season was recorded in late August 2024 (95.7 percent) and the high of 149.8 was achieved in early January.

The trajectory of long staple prices in China has been rather simpler. The steady decline from 27,900 yuan per tonne at the beginning of the season to a low point of 22,000 yuan around the turn of the year reflects persistently low demand for long staple cotton in the domestic market. A slight firming was observed in the spring as, once again, low forecasts for planted area emerged, but overall the quote for Type 137 ended the 2024/25 season 20 percent lower than it started.

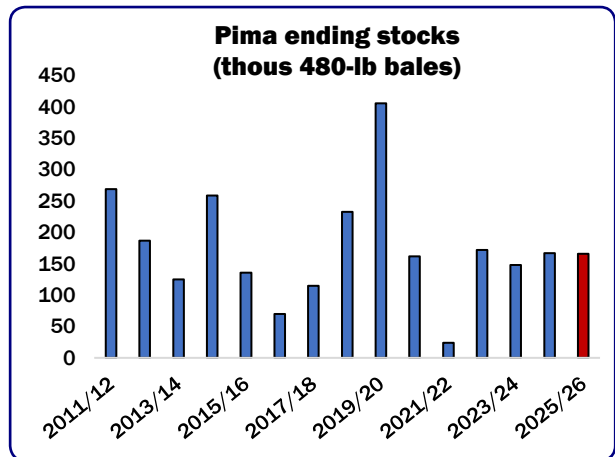


LS and ELS trade

According to USDA, Pima opening stocks on August 1, 2025 were 167,000 bales, higher than the 148,000 recorded at the start of the 2023/24 season. Over the course of the marketing year, 435,000 running bales were exported (35 percent higher year on year) and sales for 31,300 bales were carried over



for shipment in 2025/26. India returned as the principal buyer of US Pima: 170,100 bales were dispatched to that destination over the course of the marketing season (68 percent more than in 2023/24). Vietnam came in a rather distant second place with 62,000, followed by China and Peru, which took similar totals of around 51,000 (in the former case, the total was less than half of last year’s figure, while in the latter the 2024/25 total was four times higher).



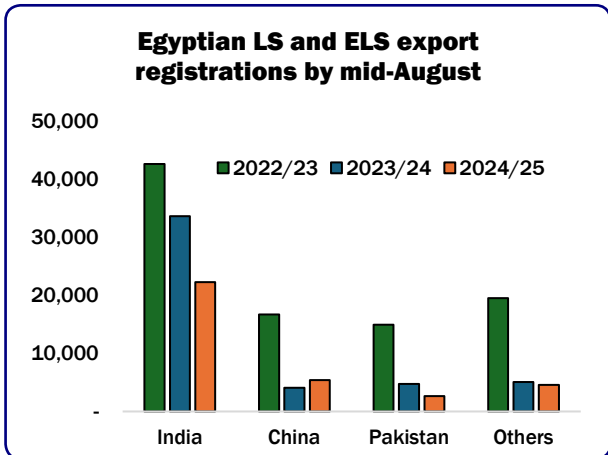
Washington’s forecasts for exports in 2025/26 is 360,000 bales, almost 20 percent lower than last year and substantially less than the average achieved in the previous ten seasons.

Nevertheless, given that production is also expected to fall this year, ending stocks by July 31, 2026 are forecast to be of similar proportions to those observed for the past three seasons.

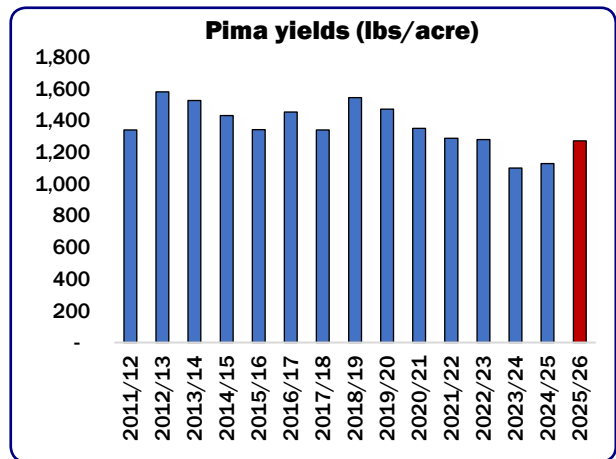
In Egypt, the marketing year runs from September 1 to August 31, so final export data for the season will be available shortly. By mid-August 2025, total export registrations of long and extra-long staple cotton amounted to 31,450 tonnes and 3,475, respectively. Those figures compare to 45,260 and 2,330 at the same moment last year and are substantially lower than the totals recorded in 2022/23, since uncertainty about the availability at the start of the current marketing period means that opportunities to make sales were lost.

The LS/ELS total committed for India has fallen by a third this year to 22,300 tonnes, while that for China has risen (from a much

lower base) by the same percentage to 5,430. Sales to Pakistan this year are fairly minimal at little more than 2,600 tonnes.



By mid-August, uncommitted stocks of ELS and LS cotton were estimated by Catgo to amount a little over 44,000 tonnes (almost half of the season’s supply). The vast majority



of that total is in the hands either of the Ministry of Finance or the state-owned Holding Company. The cotton controlled by the Holding Company (approximately 18,000 tonnes) may be allocated to public mills in due course, while auctions for the Ministry’s stocks (perhaps 25,000 tonnes) are expected to take place shortly. New crop sales normally commence at the beginning of October,



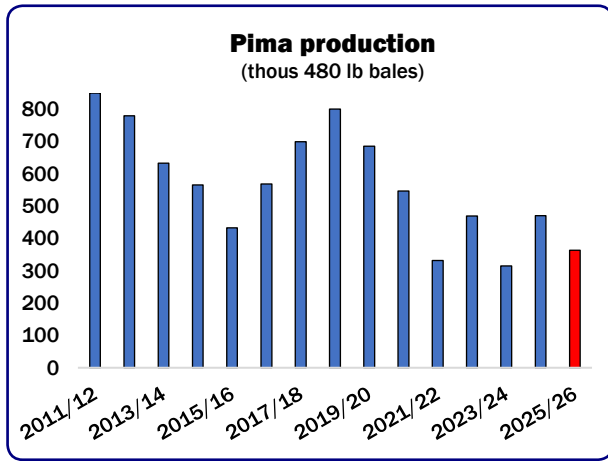
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and since the Guaranteed Prices have been withdrawn, opening prices for the 2025/26 auctions will be based on the Cotlook A Index, plus a premium.

Outlook for 2025/26: poor demand prompts a reduction in planted area

In 2025, Pima production recovered from the results achieved in the beleaguered

2023/24 season, which was affected heavy rainfall, a lower planted area and poor yields. Conditions at the start of the growing season for the 2025/26 crop have been similarly benign, and Pima yields are currently forecast to be 13 percent higher than last year at 1,273 pounds per acre.

That said, though, Washington's August supply and demand report showed 141,000 planted acres and three percent abandonment (207,000 and three percent in 2024/25). Output is thus projected at 364,000 bales, not quite as small as 2021/22 or 2023/24, but well below recent averages.

Meanwhile, following a frustrating 2024/25 season for Egyptian farmers, whose payments for seed cotton were delayed, and in light of the government's withdrawal of the Minimum Guaranteed Price system for the 2025/26 auctions, planted area has also fallen for Giza varieties this spring. Final area figures from

ICA 2025 – 'The Future of Cotton'

The International Cotton Association's annual Trade Event will bring together over 500 members of the cotton industry in Dubai this October. Discussions will focus on the primary aims and challenges in the sector, including cotton's share of global fibre use and communicating the environmental benefits of cotton cultivation.

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Catgo suggest that cotton has been sown on 194,900 feddan or 81,860 hectares, 37 percent less than last year’s published total. The opinion of some local observers, however, is that the actual figure may lie some way below the official total – perhaps by 15 to 20 percent.

The influence of poor downstream demand has also been felt in China this year. The area planted to long staples is understood to have declined to 180,000 mu (12,000 ha), and the expectation is that output will be cut by half from 2024/25 to around 25,000 tonnes.

Israeli LS production in 2024/25 amounted to 8,340 tonnes, and estimates of output in the current season are even lower at 4,325 tonnes.

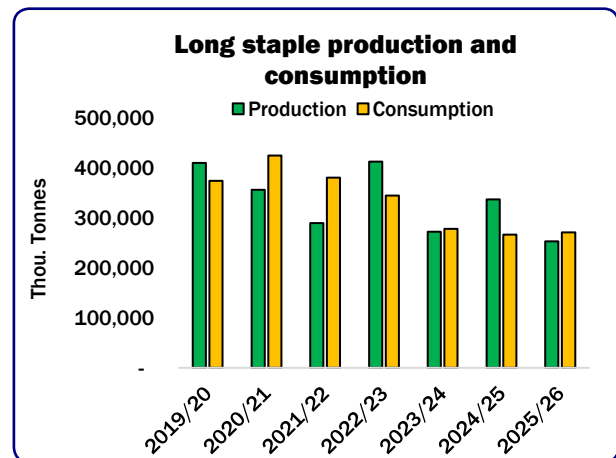
World LS Output (tonnes)			
	2023/24	2024/25	2025/26
United States	69,000	102,500	79,250
Egypt	59,500	80,000	45,000
India	80,000	70,000	70,000
China	28,000	51,000	25,000
Turkmenistan	13,000	13,000	13,000
Israel	13,000	8,340	4,325
Peru	5,000	5,000	5,000
Greece	1,500	3,000	4,000
Uzbekistan	2,000	2,000	2,000
Spain	450	1,700	5,000
Tajikistan	1,000	1,000	1,000
Total	272,450	337,540	253,575

It seems, therefore, that thanks to poor demand across the sector, global long staple production in 2025/26 could fall to a long-term low of just over 250,000 tonnes, compared to a revised total of 337,500 for 2024/25.

As for consumption, demand at destination has struggled for the past two seasons, and little change appears to be in prospect for the new marketing year. India is expected to maintain its position as the global leader in long staple cotton use, but consumption in China and Pakistan could remain stagnant as manufacturers turn to alternative varieties or fibres to achieve fabrics with the desired qualities and applications. One market that

World LS Consumption (tonnes)			
	2023/24	2024/25	25/26
India	130,000	130,000	130,000
China	60,000	40,000	40,000
Egypt	17,000	20,000	20,000
South East Asia	17,000	19,500	20,000
CIS	16,000	16,000	16,000
Latin America	12,000	18,500	20,000
Pakistan	12,000	10,000	12,000
Europe (inc. Turkey)	6,000	3,500	4,000
Bangladesh	2,000	1,090	2,500
United States	2,175	2,500	1,090
Others	4,000	5,750	6,000
Total	278,175	266,840	271,590

might buck this trend, though, is Egypt, where (as several of our contributors point out) the textiles sector is growing rapidly thanks to substantial domestic and international investment. If the country’s mills expand their consumption of both imported and local long staple cotton, that could stimulate at least a partial improvement in the mood in the sector this year.



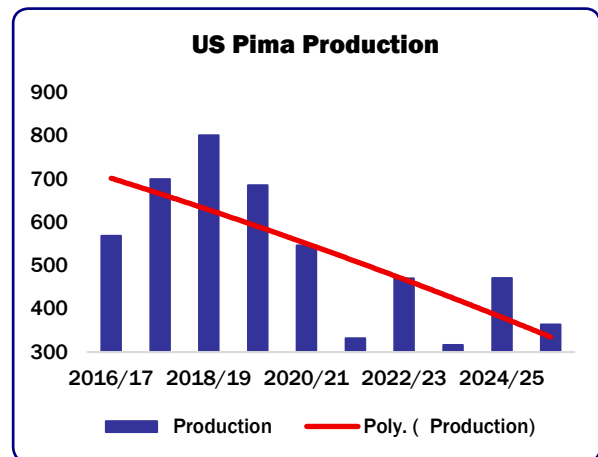
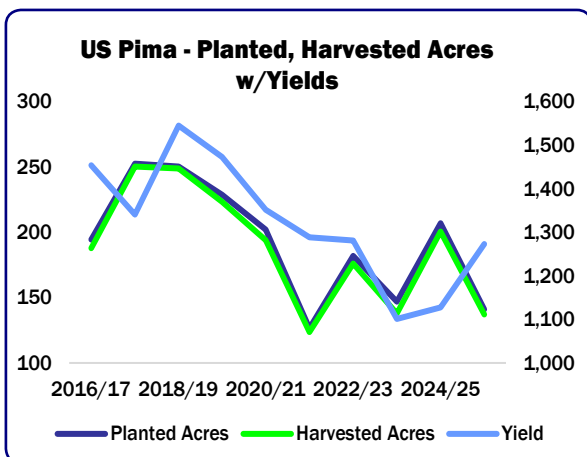
US ELS Pima



Steve Williams
President
Jess Smith & Sons

At the time of writing, the 2025/26 US Pima crop is about halfway between planting and harvest, and the consensus is that both the crop conditions and the outlook for improved yields are positive after two low yielding seasons. So far, weather and pest pressure have not posed any problems, also a respite from the two previous seasons.

As can be seen in the accompanying chart, US Pima plantings bottomed out in the 2020/21 season at 127,000 acres, and since then have worked higher thanks to better water allocations, touching a recent high last season at 207,000 acres. For the 2025/26 crop cycle, the total is estimated at 141,000 acres, down 32 percent. Yields peaked



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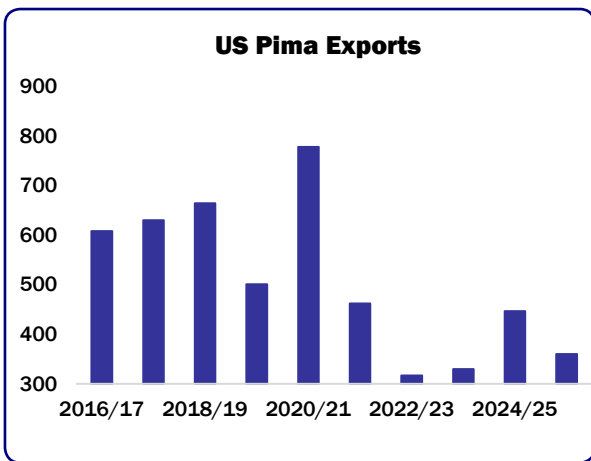
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during the 2018/19 season at 1,545 lbs per acre, then fell into a decline, bottoming out in 2023/24 at 1,101 lbs per acre. The expectation this year is for higher yields, with current estimates placed at 1,273 lbs per acre.

US Production is presently estimated at 364,000 (480-lb) bales, down 23 percent from last season. Output has fallen steadily in recent years since the high point of 801,000 bales recorded in 2018/19. It hit a low during the 2023/24 season at 316,000 bales. As mentioned above, water allocations in larger Pima areas have helped attract increased acres, but poor yields have stymied greater production increases. Declining demand and lower prices have been the main deterrent to increasing planted acreage, as low yields and prices close to the cost of production have not been enticing to growers.

The USDA currently forecasts US Pima exports to fall by 87,000 bales from last season to 360,000 in total, but there are several factors that could alter this estimate significantly.

First, the main competitor to US Pima

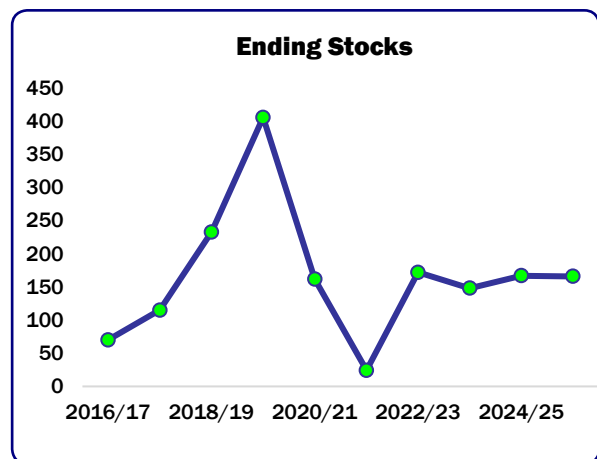


is grown in Egypt, and reports signaled that planted area in that country could be

down substantially. We are already seeing indications of this in the price of current crop Egyptian ELS, which has gone up 20 percent over the last three months.

The second factor is the introduction of legislation in the new Farm Bill called the “Buying American Cotton Act”, which is designed to increase US cotton demand by offering tax credits to businesses that use US cotton, both upland and ELS, in their products. Lastly, the uncertainty around tariffs and trade has hindered demand, but progress appears to have been made, with some deals reached that include the purchase of US agricultural products. These three factors alone could improve demand markedly.

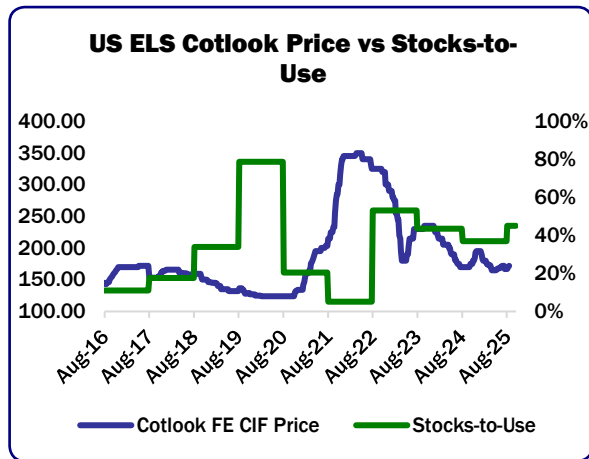
Looking at the current balance sheet, using USDA estimates, we see ending stocks continuing their sideways movement, year on year, between 148,000 bales and 172,000 (480-lb) bales since an interim low of 24,000 bales at the close of the 2021/22 season. This steady dynamic in ending stocks, coupled with increasing demand, has allowed the “Stocks-to-Use” calculation to fall continually since the near-term high of 53 percent set during the 2022/23 crop season, but is set to rebound in 2025/26 to 45 percent.



	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
beg. Stocks	233	406	162	24	172	148	167
Production	686	547	332	470	316	471	364
Consumption	15	15	12	7	10	5	5
Exports	501	778	462	317	330	447	360
Ending Stocks	406	162	24	172	148	167	166
Stocks/Use	79%	20%	5%	53%	44%	37%	45%

The “Stocks-to-Use” ratio is a good metric with which to judge whether supply is either tight or more than sufficient to satisfy demand and, from there, to try to forecast the impact on price. The chart opposite shows the relationship between the US Pima price (CIF Far East) and Stocks-to-Use ratio, from 2016/17 to 2025/26, based on current USDA estimates. As becomes quickly apparent, when the Stocks-to-Use figure is high, the US Pima price suffers, while when Stocks-to-Use is low, the price rallies.

Trying to determine where the 2025/26 US Pima market is headed is obviously made more challenging by the imposition of new tariffs and ongoing (and sometimes chaotic) trade talks, but there are indications that agreements are being signed that are positive to commodities. As mentioned above, we at last have some potential clarity on trade, supportive legislation has been written into the new Farm Bill and there



are reports that our major ELS competitor is planting many fewer acres this year. This gives us confidence that demand for US Pima will be on the increase, with the Stocks-to-Use figure falling from its current level, and that the price will rise higher than last season. If a China trade deal is signed, US Pima prices could go higher still.

This article was written on August 19, 2025.

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Threads of heritage, weaves of tomorrow: SCZONE and Egypt's textile renaissance



Mr. Waleid Gamal El-Dien
Chairman

General Authority for the Suez Canal Economic Zone (SCZONE)

From ancient looms to automated factories, Egypt's legacy in textile manufacturing spans millennia. This rich heritage, once celebrated along the banks of the Nile, now finds renewed momentum on the shores of the Suez Canal. The Suez Canal Economic Zone (SCZONE) is not merely reviving Egypt's textile tradition; it is reimagining it for the future, positioning itself as a regional hub where heritage meets innovation and where industrial fabrics are woven into global value chains.

As global value chains continue to evolve in response to geopolitical shifts, sustainability imperatives and digital transformations, SCZONE stands at the forefront of industrial reinvention in the MENA region. Strategically located at the crossroads of three continents and at the heart of global trade flows, SCZONE is fast emerging as a competitive

destination for integrated textile and garment manufacturing.

With Egypt's long-standing legacy in the textile industry and the Egyptian government's renewed focus on boosting industrial development, SCZONE plays a pivotal role in attracting foreign direct investment (FDI), promoting industrial integration and fostering inclusive economic growth. SCZONE is expanding its portfolio of textile and ready-made garment projects, offering robust infrastructure and market access to global manufacturers seeking resilient, sustainable and cost-effective supply chains.

A strategic vision for industrial integration

At the core of SCZONE's development strategy lies a vision of transforming it into a fully integrated manufacturing and logistics hub. This includes developing sector-specific

clusters that maximise value creation through industrial integration. The textile and garment sectors are one of the most prominent success stories in this vision, bolstered by national policies that promote localisation, import substitution, and export-led growth.

One of the flagship projects in this regard is the Textile Section in Al-Qantara West Industrial Zone, located in close proximity to SCZONE ports on the Red Sea and the Mediterranean Sea and key maritime routes. It is being developed as a comprehensive ecosystem for textile production, encompassing spinning, weaving, dyeing, finishing and garment manufacturing. It aims not only to localise production but also to link Egyptian-made products with global markets efficiently and competitively.

Competitive advantages driving growth

SCZONE offers a unique mix of competitive advantages that make it an ideal location for international textile investors. First and foremost is its geostrategic location, with six seaports providing direct access to Europe, Asia and Africa. These ports form the logistical backbone for seamless export and import operations.

Second, SCZONE provides world-class infrastructure, including ready-to-use industrial plots (Plug & Play), advanced utilities and integrated transportation networks connecting ports, industrial zones, and local markets. Investors benefit from customized investment incentives, including tax exemptions, streamlined licensing procedures, and one-stop-shop services to increase the ease of doing business.

The favourable labour market, with a large, skilled and cost-effective workforce, further enhances the attractiveness of SCZONE for labour-intensive industries such as textile and garment manufacturing.

Attracting global partnerships and building industrial depth

SCZONE has rapidly evolved into a magnet for international textile and garment manufacturers, offering an integrated environment for end-to-end production.

Today, Sokhna Industrial Zone alone hosts 28 operational factories, with 27 more under construction. Total investment in the textile sector amounts to \$585 million, covering a diverse range of activities including woven and non-woven fabric production, spinning, knitting, dyeing, finishing and garment manufacturing. The product scope is equally broad, ranging from medical textiles and home furnishings to readymade garments, carpets, blankets and accessories.

Complementing this industrial ecosystem is the Al-Qantara West Industrial Zone, where 26 textile and garment projects have been established with total investments worth \$660.7 million, spread over more than 1.6 million square metres. These projects are engaged in ready-made garment production, including fashion apparel, as well as fabric printing, dyeing and finishing. Specialised units also operate in the production of accessories, denim and thread assembly, contributing to a robust and diversified textile value chain.

The scale and integration of these projects have attracted major partners from China, Turkey and Thailand, reflecting growing global confidence in SCZONE as a long-term industrial base. These partnerships are not limited to manufacturing; they also support technology transfer, workforce development and supply chain localisation, reinforcing Egypt's role as a competitive and strategic destination for textile and garment investment in the region.

Integrating seamlessly into global value chains

One of the defining advantages of SCZONE is its ability to support deep integration with global value chains. With direct access to six seaports and streamlined customs procedures, manufacturers operating within SCZONE can efficiently export finished products to key markets across Europe, Africa, the Middle East and beyond. Egypt's extensive network of Free Trade Agreements (FTAs) further amplifies this advantage, providing preferential access to over two billion consumers.

To support value chain integration, SCZONE is also promoting investment in complementary industries such as accessories manufacturing, technical textiles and ready-made garments. This holistic approach ensures that investors can source inputs locally, reduce lead times, and respond flexibly to changing consumer demands in export markets.

Supporting national strategies and regional co-operation

SCZONE's efforts are fully aligned with Egypt's broader strategy to enhance the competitiveness of its textile industry and increase its share in global markets. SCZONE serves as a gateway for collaboration in industrial development and trade facilitation. With a strong pipeline of logistics projects, including multimodal transport networks and port expansions, SCZONE is poised to play

a critical role in reinforcing Egypt's role as a regional export and distribution centre.

Conclusion

As the global textile and apparel industry reconfigures in response to shifting trade dynamics and the need for sustainable, responsive production models, SCZONE offers a compelling value proposition for international investors. By combining a strategic location, an integrated infrastructure and forward-looking industrial policies, SCZONE is not only reshaping Egypt's manufacturing landscape but also contributing to global efforts to build more resilient and inclusive value chains.

In the years ahead, SCZONE will continue to champion industrial integration, innovation and sustainability, cementing its position as a leading regional hub for textile and garment production at the crossroads of global trade.



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Egypt's textile and apparel sector: a global investment haven anchored in heritage and opportunity



Hossam Heiba
President

General Authority for Investment and Free Zones (GAFI)

As the global economy continues to grapple with persistent disruptions – ranging from supply chain fragility to shifting trade alliances – investors are increasingly focused on sectors that combine resilience, scalability and strategic relevance. Egypt's textile and apparel industry offers precisely that.

Anchored in its history of globally renowned long-staple cotton production, and supported by a forward-looking government



policy, Egypt is emerging as a compelling destination for textile investment. With more than US\$46 billion in net foreign direct investment (FDI) recorded last year alone, Egypt is signalling its attractiveness across multiple sectors, among which textiles stand out as a core opportunity.

The enduring strength of Egyptian cotton

Few materials enjoy the prestige and proven quality of Egyptian long-staple cotton. Known globally for its strength, softness and durability, Egyptian cotton continues to dominate premium markets where consumers demand not only comfort and luxury, but also long-lasting performance.

In recognition of its global reputation, the Egyptian government has taken steps to preserve and enhance the integrity of this

resource through stringent quality control across the entire value chain – from farm to finished product. These efforts have reinforced Egypt’s position as a trusted partner for luxury and mass-market global brands alike.

Competitive advantage in cost and connectivity

Egypt’s production ecosystem offers a strategic cost advantage through affordable energy, competitive labour, and broad access to preferential trade agreements. Whether within Egypt’s various Free Zones or the strategically located Suez Canal Economic Zone (SCZone), investors gain:

- **duty-free market access** via agreements with the EU, COMESA, AfCFTA, and the Qualified Industrial Zones (QIZ) agreement with the United States
- **logistical efficiency** due to Egypt’s dual-coast geography, 18 sea ports, and the Suez Canal, significantly reducing shipping time to European, African and Asian markets
- **integrated industrial clusters** equipped with ready-to-use infrastructure, accelerating both setup and time-to-market

A government vision for textile growth

Textiles and apparel have been prioritised under Egypt’s broader industrial strategy, and that commitment is now evident in large-scale initiatives such as:

- expanding textile industrial zones in Borg El Arab, Minya, 10th of Ramadan, and within the SCZone – each providing designated plots for spinning, weaving, dyeing and apparel manufacturing
- offering targeted investment incentives such as tax rebates, streamlined licensing (including the golden license), a unified one-stop-shop via GAFI, and guarantees around capital flow and profit repatriation

- Developing specialised labour through government-industry partnerships with vocational and technical training institutes

Rebuilding global supply chains – with Egypt at the centre

In a post-pandemic world shaped by near-shoring and “friend-shoring,” Egypt is well-positioned to serve as a reliable alternative to traditional Asian and Turkish production hubs. Its vertically integrated textile value chain – starting from cotton cultivation to ready-made garments – provides vital supply chain stability in uncertain times.

Aligning with sustainability and global compliance

Global brands are under mounting pressure to meet sustainable sourcing and production standards. Egypt’s textile industry is actively aligning with this transformation through:

- adoption of organic practices and Better Cotton Initiative (BC)-aligned farming
- deployment of water-saving technologies essential to environmental sustainability in arid regions
- investment in renewable energy infrastructure within industrial zones to reduce environmental impact

A call to global investors

At this critical juncture, Egypt’s textile and apparel industry presents a unique convergence of tradition, opportunity and forward-thinking policy. With investor-friendly frameworks provided by GAFI, and the added benefit of the SCZone’s industrial infrastructure, Egypt is not only preserving its cotton legacy – it is expanding it to meet the demands of modern global trade.

For investors seeking premium quality, long-term growth, and operational stability, Egypt’s textile sector is a gateway to future success.

Export councils serve the public interest and boost exports – Egypt is on its way to becoming a regional textiles hub



*Interview with Eng. Hany Salam, Chairman, Textiles Export Council
Conducted by Mohamed El-Sayed Darwish, Cotlook representative in Egypt and Arab-speaking countries*

Mohamed El-Sayed Darwish: Could you please introduce the work of the Textiles Export Council and tell our readers how it is striving to attract foreign investment and encourage local investment?

Hany Salam: There are thirteen Export Councils in Egypt, each covering different industrial sectors. The primary mission of every Export Council is to provide the relevant Minister – who appoints the Council members – with a strategic vision for boosting exports, overcoming challenges and addressing weaknesses that hinder export growth.

It is important to distinguish between Export Councils and Industrial Chambers. Export Councils serve the public interest of all exporters by recommending policies and initiatives that increase exports. Industrial

Chambers, on the other hand, act as lobbying groups to defend the direct interests of manufacturers and advocate for specific policies. Both roles are necessary, but the Export Councils focus on the broader national objective of raising exports, while Industrial Chambers defend sectoral or private interests.

MED: Can you tell us about the promotional activities undertaken by the Export Council?

HS: Promotional activities are central to our work. They include hosting international buyers in Egypt and organising matchmaking meetings between Egyptian manufacturers/exporters and foreign buyers.

One of the most important initiatives is the *Destination Africa* exhibition, held annually in Cairo. The Textiles Export Council plays a

leading role in arranging business-to-business meetings at this fair, ensuring that Egyptian exporters establish direct and successful trade relations with international buyers. *Destination Africa* is essentially a sourcing exhibition, designed to link Egyptian manufacturers directly with foreign importers, thereby increasing exports – our ultimate goal.

MED: How does the Export Council work to enhance competitiveness among Egyptian exporters?

HS: Egypt enjoys several competitive advantages: its strategic location close to Europe, which makes it a gateway to European markets, and its preferential trade agreements with many countries in Africa and Europe. These agreements allow easy access for Egyptian goods, whether produced by Egyptian manufacturers or by foreign investors who have set up factories in Egypt to benefit from these advantages.

MED: How will the Council encourage and motivate companies in the sector to meet environmental sustainability requirements for access to European markets?

HS: The Council regularly organises training workshops and awareness programs, often supported by international grants, to educate exporters on sustainability requirements. These cover areas such as environmental safety, climate protection and emissions reduction.

In addition, the Council invests its own resources to ensure companies are fully informed about the environmental standards required to access European markets without barriers. This proactive role ensures that Egyptian exporters remain competitive in a world increasingly shaped by sustainability.

MED: How can Egypt become a regional hub for textile manufacturing and trade?

HS: Egypt is already on the path to becoming such a hub. Several factors contribute to this:



- The US-China trade war and tariffs imposed by the Trump administration pushed investors to search for alternative production bases.
- Egypt's enhanced infrastructure and ports have greatly improved its competitiveness.
- Lower labour costs compared to countries such as Turkey make Egypt attractive to foreign investors seeking regional manufacturing and export centres.

For these reasons, Egypt is emerging as a top choice for international investors aiming to establish regional textile production and distribution bases.

MED: Could you share details on the Council's training programmes, workshops and statistical reporting for companies in the sector?

HS: The Council works closely with government agencies to collect detailed data and statistics, which form the basis of its market studies. These studies identify opportunities for boosting exports of specific textile products.

For example, during the first half of this year, Egyptian exports to Algeria rose significantly due to new Algerian regulations limiting imports of finished products. This created opportunities for Egyptian intermediate products and raw materials.

Similarly, exports to Brazil have increased under the Egypt–Mercosur preferential trade agreement, which reduced tariffs to two percent this year and will lower them to zero next year. Such insights, based on accurate statistics, allow the Council to guide exporters toward promising markets and help achieve export targets.

MED: The US-China trade war: is it a challenge or an opportunity for Egypt?

HS: The trade war is truly a golden opportunity for Egyptian industries – not only textiles but all manufacturing sectors. The tariffs imposed by the Trump administration opened new doors for Egyptian exports. This should be seen as a gift that must not be wasted.

Of course, with opportunities come challenges. It requires strong coordination across all Egyptian industrial sectors to capitalise on this chance, create jobs and achieve an unprecedented boost in exports.

MED: Technical textiles in Egypt are being described as a success story. What is needed to ensure this becomes a sustainable reality?

HS: The technical textiles industry in Egypt has witnessed remarkable growth recently. These products have higher added value compared to traditional textiles, which is why many factories are moving into this field.

The Export Council, in cooperation with the Ready-Made Garments and Home Textiles Councils, established the first specialised laboratory in Egypt for testing technical textiles. This enables factories to ensure that their products meet international standards,



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encouraging more companies to enter this high-value segment.

Universities teaching textiles engineering should also give more focus to technical textiles, but limited resources remain a challenge. At the same time, Egyptian companies must modernise their understanding of what qualifies as technical textiles, since international standards evolve quickly. Staying aligned with global definitions and innovations is essential for long-term success.

MED: Is there any other issue that you would like to raise that you think is important for international markets to understand?

HS: I would highlight again the clear difference between Export Councils and Industrial Chambers. Export Councils are mandated to serve the public interest, by increasing exports and foreign currency revenues for the country. Industrial Chambers, meanwhile, act as lobbying groups to reduce costs and bureaucracy for manufacturers. Both play useful but distinct roles.

Egypt's textile industry is entering a new phase of development, supported by improved infrastructure and logistics. Combined with the advantages created by the US-China trade war, this provides Egypt with a genuine opportunity to expand its exports and achieve national economic goals.

Statement by Eng. Fadel Marzoukon on the Minya Industrial Zone Project



Eng. Fadel Marzouk
Chairman
Apparel Export Council of Egypt

I am pleased to announce that the government has approved the allocation of 5.5 million square metres in Minya to establish a specialised industrial zone for ready-made garments and textiles. The planned development will accommodate around 600 new factories, significantly boosting our sector's production capacity and expanding Egypt's manufacturing base.

We estimate that this ambitious project will create between 800,000 and one million direct and indirect jobs, with a special focus on empowering women in Upper Egypt and driving the local economy forward.

Strategic context

This project forms part of our broader strategy to reach \$12 billion in garment exports by 2031. To achieve this, we are committed to attracting foreign investment and enhancing both production efficiency

and logistical capacity. Government support has been instrumental – accelerating land allocation, advancing infrastructure development and working in close coordination with the Prime Minister, the Minister of Industry, and the Minister of Investment.

Government support and rapid implementation

I commend the efforts of Prime Minister Mostafa Madbouly, Minister of Transport Kamel El-Wazir, and Eng. Hassan El-Khatib in ensuring the swift allocation of land and rapid provision of essential utilities. This reflects the state's determination to position Egypt as a regional hub for textile industries.

Export and expansion plans

Following an 18-percent growth in exports in 2024 – reaching \$2.84 billion – our goal is

to achieve annual growth of 20-25 percent this year, reflecting strong demand from the European and US markets (which achieved increases of 34 and 17 percent respectively last year). We already have initial interest from Chinese and Turkish companies, alongside local manufacturers eager to expand.

Project monitoring and comparative models

On June 4, 2025, Minister Kamel El-Wazir inspected the integrated textile cities in both Wadi Seryria (Fayoum) and Al-Matahra (Minya). Each covers 5.5 million m² and represents a transformational leap in Upper Egypt's exports.

In Fayoum, a comparable city – built under the industrial developer model – will attract over \$1.5 billion in investment and create 150,000 jobs, benefiting from excellent transport links, including the high-speed electric train.

Investment partnerships

Early partnerships include:

- Giza Spinning in Al-Matahra (46,000 m², 2,500 employees, 50 percent local materials).
- Golden Avenue (Egypt–Vietnam joint venture, \$3.5M investment, 350 workers at present, target 1,500).
- Over 10 Chinese and Turkish companies are considering entry, with expected \$2 billion investment in the first year.

Infrastructure and logistics

Both Minya and Fayoum will feature advanced road networks, high-speed rail access, proximity to a dry port in October, dedicated industrial schools, R&D centres, and integrated logistics hubs. In Minya, the Al-Matahra Zone already hosts 621 industrial projects and 68 SME units, though some investors note the need for better gas, power and wastewater services.

In conclusion, this project is more than an industrial investment – it is a socio-economic transformation for Upper Egypt, boosting

exports, creating jobs, empowering women and positioning Egypt as a global textile manufacturing leader.

Almagd Company: bringing Egyptian cotton excellence to the world



Ahmed Aboulmagd
Owner and Manager
Almagd for Import & Export

Our company was established with a clear vision: to bring the best of what Egyptian cotton has to offer to the global market. With the rising international demand for premium textiles, we chose to specialise in the production and export of extra-long and ultra-soft cotton varieties – positioning Egypt as a world leader in this sector.

To achieve this, we signed a co-operation protocol with the Egyptian Cotton Research Institute. This partnership allows us to develop a fully integrated value chain, from field to international customers, ensuring quality and consistency. Our focus is on exporting selected high-quality Egyptian cotton varieties, known for their superior fibre length, softness and purity. These are the fibres trusted by premium textile companies across Europe, India, China, Bangladesh and Pakistan, used in luxury garments, fine linens and premium towels.

Moreover, we do not just export cotton – we support farmers, oversee sorting, processing and packaging, and ensure compliance with global standards. We are also committed to sustainable practices, efficient water use and smart agriculture, in partnership with local and global stakeholders. Looking forward, we aim to expand our reach and help revive the global reputation of Egyptian cotton as the finest in the world.

Women are reshaping the Egyptian textile industry



Nancy Salam

*Sales Manager and Board Member at Salamtex Lace
Founder of Libra Sportswear*

Egypt is in an optimal position for growth in the textile sector due to its geographical location, economic landscape, and large labour force. Of particular interest is the

significant inflow of women to the textile industry in recent years, not solely as sewing operators as was the usual case, but in managerial levels as well as entrepreneurial roles. Greater access to education, digital tools and funding opportunities are all key factors in the rise in women's inclusion in textiles. This increase is particularly evident in regions where textiles account for a large portion of the economy, with women leveraging both tradition and technology to create global brands.

In order to increase the value of Egyptian textiles production, it is imperative to focus on innovation and value-added processes. We are seeing numerous women evaluating the Egyptian textile supply chain and creating innovative products based on the capabilities within the sector. As part of the fourth generation involved in Salamtex Lace, a textile mill producing cutting-edge fabrics such as swimwear, intimate apparel, sportswear fabrics, and technical textiles, I have been able to use the technologies typically sold B2B to brands within Egypt and internationally such as Calvin Klein, Victoria's Secret and Etam, to create Libra Sportswear. Libra is a brand specialising in high-tech sportswear and swimwear products using the latest in fabric technology and sports apparel, particularly focused on creating solutions for women who choose to dress modestly. This is a segment that has recently seen huge growth due to the inclusion of women creating brands in areas where they see a gap in the market. This is just one example of how Egypt can use capabilities that generally were being supplied to other markets to create new value to develop the retail sector. Facilitating this growth is the way in which this generation of entrepreneurs is using e-commerce to reach customers via methods which were typically very capital intensive. As a result, the textile sector is witnessing a transformation shaped by women-led innovation, collaboration and a growing focus on technical capabilities.

www.salamtex.com

www.libra-sport.com

Dream of Nile collection: expanding the legacy of Egyptian cotton



Alessandro Moretti Ciacci
Sales and Marketing Director
Sharabati

Egyptian cotton has long been prized for its use in shirting and bed linens, but it has rarely been used in bottom-weight fabrics – until now. With our Dream of Nile collection, we have introduced it into the world of denim and gabardine, allowing consumers to experience its luxury in pants and jackets for the first time.

The Dream of Nile collection features denim and gabardine fabrics made exclusively from pure Giza 94 Egyptian cotton, redefining premium quality with a fabric that is elegant, long-lasting and as smooth as silk. This level of luxury and excellence simply cannot be achieved without Egyptian cotton.

Thanks to the long staple of Giza 94, we are able to achieve a natural shine in the cotton fabric that would otherwise require man-made cellulosic fibres or mercerisation, while it also enhances the durability of the fabric, extending the lifespan of the garment.

Egyptian cotton is DNA-traceable to its origin, providing supply chain transparency to help brands ensure authenticity.

We have been presenting the Dream of Nile collection for three years. It has become a recognized trademark in the industry, and we proudly collaborate with many luxury brands around the world.

While Egyptian cotton offers unmatched quality and potential, a few key challenges remain:

- Despite being handpicked, the cotton often suffers from high contamination due to improper field conditions, contact with foreign matter during collection, and inconsistent harvesting techniques. This makes dyeing more difficult and limits the ability to achieve clean, high-quality fabrics.
- The availability of sustainably certified Egyptian cotton – such as Regenagri or organic – remains limited. Egypt is making a clear shift toward more sustainable agricultural practices, and this year has seen a positive increase in certified volumes, though supply still falls short of global demand.
- There is currently a shortage of high-quality garment producers in the market, particularly for chinos and semi-formal trousers, limiting Egypt's ability to offer full-package solutions to global brands.

Despite these challenges, we believe the future is bright. At Sharabati, we are committed to supporting this transition – and to expanding the luxury of Egyptian cotton beyond its traditional applications, into everyday garments that are built to last.



Turkish investment and Egypt's strategic advantage in the global textile trade



*Interview with Mustafa Denizer
Conducted by Mohamed El-Sayed Darwish, Cotlook
representative in Egypt and Arab-speaking countries*

Mohamed El-Sayed Darwish: Mr Denizer, could you briefly introduce yourself and your professional roles?

MD: I currently serve as:

- Chairperson of the Turkish-Egyptian Business Council at DEIK
- Vice President of the International Textile Manufacturers Federation (ITMF) in Switzerland
- Vice President of the Turkish Textile Employers Association
- Board Member of ITHIB – Istanbul Textile Raw Material Exporters Association

I am also the CEO of Globe Spinning and Dyeing, which has been an investor in Egypt since 2007. Our facility in Sadat City covers 115,000 m², employs 2,200 people, and is

complemented by factories in Turkey and Tunisia.

MED: What marked the beginning of the growth in Turkish investment in Egypt?

MD: 2007 was a turning point. That year, a Free Trade Agreement (FTA) between Turkey and Egypt was signed, boosting bilateral trade from \$1.5 billion in 2007 to nearly \$10 billion today. Since then, Turkish companies have invested \$3.5 billion directly in Egypt, creating around 100,000 jobs and generating \$1.5 billion in annual turnover.

MED: How significant is Turkey's role in Egypt's textile and garment sector?

MD: Turkish businesses now account for roughly one third of Egypt's textile and garment exports. The top four textile exporters in Egypt are Turkish-owned, and four to five Turkish garment manufacturers

consistently rank among Egypt's top ten garment exporters. Annual Turkish investment is expected to grow by \$500 million each year.

MED: Why are Turkish companies so attracted to Egypt?

MD: Egypt offers:

- Low labour and utility costs (competitive electricity and gas rates).
- An extensive network of trade agreements, including QIZ (which offers duty-free access to the US market), Mercosur, AGOA, and Euro 1.
- Unique trade advantages after higher US tariffs were imposed on countries including Bangladesh, India, Sri Lanka, Vietnam and China.

MED: What strategies can Egypt use to attract more international investment?

MD: I recommend four:

1. Export financing and incentives – providing subsidised loans for high-performing exporters
2. Targeted import source policies – focusing on sourcing from key partners such as Turkey to support export-oriented industries
3. Sustainability support – fund certification, compliance and green production upgrades
4. Local currency trade agreements – reducing FX pressure and encouraging bilateral trade.

MED: How do you see the global garment trade shifting in the near future?

MD: The US tariffs on countries including Pakistan, India, Vietnam, Cambodia,

China and Sri Lanka will be painful. However, Egypt, by virtue of the QIZ system, can avoid these hikes and enjoy up to a 40-percent cost advantage over rivals. This is likely to drive a wave of sourcing shifts toward Egypt, potentially starting within the next two months.

MED: Would you like to say anything else in conclusion?

MD: Egypt stands on the brink of a transformational opportunity in garment exports. With the right policies, investment facilitation and infrastructure, Egypt can position itself as a top global sourcing hub, especially for US buyers.



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RECLAIM Sustainability! in Egypt: towards a responsible, inclusive and climate-smart cotton and textiles value chain



Dr Omar Abdin
Country Director
Solidaridad

Textiles and apparel production forms one of the most important industrial sectors in Egypt in terms of value addition, GDP (representing three to four percent of the country's total), employment (half a million people work in 6,742 enterprises, equivalent to 20 to 30 percent of employment within the industrial sector) and it has been key to the country's industrial development strategies over the past few decades. Overall, the Egypt cotton sector employs approximately 600,000 workers. Cotton and its associated products are either consumed locally or exported.

The RECLAIM Sustainability! project mobilises, activates and strengthens farmers and workers who produce cotton for the domestic and international markets. We engage in partnerships with stakeholders, including research institutes, to build our evidence base for advocacy in contact with

NGOs, roundtables, industry associations and government institutions. The project also advocates to influence the textiles agenda with the stakeholders in companies and governments, prioritising sustainability issues.

Through the project's three impact pathways, RS! **advocates** through inclusive dialogue to influence agendas and develop evidence-based solutions to address socio-economic and environmental shortcomings in trade and value chains. It **accelerates** disruptive innovations to promote the position of farmers and workers in the supply chain. Additionally, RS! **amplifies** the voices of farmers to mobilise, activate and engage farmers, citizens and CSOs to change or influence the policy agenda, on issues related to unsustainable and non-inclusive trade in the cotton value chain. In Egypt, the project advocates for the adoption of sustainable and

climate-smart textile (wet) processing, decent work policies and frameworks including female empowerment in cotton production amongst public and private decision-makers.

The Reclaim Sustainability! Project aims to contribute to a responsible, inclusive and climate-smart cotton and textiles value chain in Egypt, in which smallholder cotton farmers and garment workers benefit from decent work, are able to earn a living wage, and achieve fair value for their products, so that the chain and ecosystems are protected.

One of the key areas targeted is health and safety, since farm workers are often exposed to harmful toxins, primarily because they are not provided with or do not wear adequate personal protective equipment while spraying chemical pesticides and herbicides. The environmental and social issues that arise during cotton cultivation and production also lead to reputational risks for retailers and brands in the apparel sector. Most textiles factories do not have proper waste water treatment plants and release waste water into the environment, contributing to the pollution of soil and water systems. Wet processing is very intensive in terms of water, chemicals and energy use, and has been routinely associated with significant degradation of surface water as well as ground water depletion. In this regard, RS! Egypt has engaged in partnerships with the Environmental Compliance Office, and is affiliated with the Federation of Egyptian Industries (FEI). RS! Egypt partnered with the office to achieve progress towards a factory environment that ensures better occupational safety and health practices for workers. The project successfully engaged employers and workers, equipping them with advocacy skills to engage with key decision-makers from the Chamber of Textile Industries and the Chamber of Ready-Made Garments.

The project conducted three dialogues between employers and workers on occupational health and safety issues in textile wet processing. The first dialogue took place in the Alexandria governorate, in one of the largest industrial zones in Egypt with 14 participants. The second took

place in Filmar (one of the biggest textile factories) also involving 14 participants, while the third was held in the 10th of Ramadan Industrial Zone with 22 participants and the fourth was in Mahala El Kobra with 34 participants. Following the discussions, participants were better able to identify and address safety hazards in their own textiles and garments factories. This included an improved awareness and appreciation that even a small hazard can lead to a dangerous situation for workers over time. This has also led to improvements in the structure and effectiveness of Occupational Safety and Health committees within factories. Equally, the dialogue has increased support for the use of safety equipment in these factories.

The project also delivered two chemical management workshops. The overall objective of these activities was to give an understanding of the basic aspects of chemical safety. It provided an introduction to the scope of hazardous substances and the problems they pose in the workplace, improved the skills of participants in recognising hazards and preventative safe work practices in relation to the production and use of chemicals in wet processing. The workshops were aimed at conveying information to workers, employers and government officials alike. The groups discussed challenges, including:

- insufficient data collection and processing
- a lack of consumer awareness and insufficient education on circularity in textiles; limited information exchange
- low market penetration of innovative start-ups and path dependencies for established businesses in competitive market environments

The outcomes included various recommendations for introducing best practices:

- incremental innovation and disruptive business models which encourage circular production and consumption patterns

- enabling regulations and soft policies as well as research and development for circular economy principles in the textile sector
- strategies to overcome challenges in recycling technologies

RS! has conducted two training sessions on the circular economy for factories, looking at how to comply with the environmental regulatory framework and engage with policy makers and communities. In this training, employers, members of the Chamber of Textiles Industries and workers discussed the needs and opportunities to create a circular economy for textiles. The two sessions were attended by 27 and 22 participants respectively.

The project has also successfully collaborated with the Ministry of Agriculture and Land Reclamation, the Cotton Research Institute and the Agriculture Research Institute, in coordination with Enroot, to develop a policy framework based on sustainable and climate-smart cotton production to support informed dialogue.

Through stakeholder consultations, the project conducted two national workshops with cotton cooperatives, the Ministry of Agriculture, the Agriculture Research Institute and Cotton Connect to gather input on policy gaps and generate policy recommendations.

The project successfully collaborated with the Ministry of Agriculture to develop a policy brief on sustainable farming. The recommendations, focused on promoting climate-resilient agriculture, were formally adopted as part of the National Agricultural Policy framework.

This milestone directly supports the project's objective of fostering sustainable resource use in agricultural value chains. By embedding climate-resilient practices into national policy, the project ensures a long-term impact beyond its duration, particularly for smallholder farmers.

Through stakeholder consultations, the project conducted three regional workshops with farmers, government officials and CSOs to gather input on policy gaps. In terms of

capacity-building, the project trained 50 government extension officers on integrating sustainable practices into agricultural frameworks.

The project carried out a textile waste mapping study and finalised the findings for the reform of the wet processing in the textile sector. The study was conducted in three governorates and in 10 textile factories on the practices, challenges and opportunities in wet processing.

As for the second milestone, the project developed a digital solution using remote sensing technology and the creation of a web portal (in coordination with an organisation called Lemon Tree) that has the potential to strengthen local communities by fostering more transparency in the value chain, as well as providing extension services to small farmers. The adoption of remote sensing for 1,462 plots will help to improve production, reduce costs and preserve resources.

The project taught digital skills to 16 community leaders enabling them to deliver information to small farmers. The remote sensing technology was adopted in two governorates and the extension services were sent through short messages on WhatsApp to producers. The agricultural guidance includes information on crop health, weather monitoring, emergency preparedness and climate change. In addition, 2,412 farmers have increased quality production by learning about fertilisation, water management, climate change, emergency preparedness, via the digital information received in the short messages (SMS) and using the remote sensing technology the geo-database and web portal.



Textile consolidation fund (TCF) - a platform to achieve competitiveness in the international playing field



Mohamed El-Sayed Darwish
Agent for Egypt and all Arabic-speaking countries
Cotlook Ltd

TCF plays a vital role in the field of technical inspections conducted for all textile products and training, as it assists factories that export textile products. The permanent committee for the spinning industry is the body responsible for monitoring and developing the spinning and textile sector in Egypt. It also works to enhance export capacity and improve the efficiency of factories in collaboration with TCF to determine the standard specifications for textile products. Lastly, it works to develop technical research aimed at increasing the volume of exports for all textile products, as the Fund strives to support exporters.

TCF has completed the procedures for linking its laboratories with Misr Technology Services, an Egyptian company developing e-commerce technology, after the Egyptian customs authority approved the Fund's

participation in the digital customs platform. This allows greater transparency in export processes, as well as contributing to the creation of a sustainable investment environment based on trust between the TCF, exporters of textile products, and entrepreneurs.

The Fund plays a prominent role in assisting the production of internationally competitive export-ready products by conducting research and putting together the necessary proposals for factories, services that TCF provides to exporters for free to enhance factory efficiency. In addition to establishing laboratories, research institutes and training centres aimed at raising the technical standards of this industry, the Fund collaborates with global scientific bodies to enhance the marketability of Egyptian textile and spinning products. For instance, it can

conduct case studies of individual factories, finding the solutions to problems and providing the necessary reports and proposals to the factories for free, all in the cause of supporting exports by stimulating productivity, performance and enhancing capacity.

The Fund manages laboratories (for testing chemicals, textiles and yarn), and can offer advice on production lines at all stages in the process from yarn manufacturing to weaving. It also offers technical testing services to spinners, weavers, textile manufacturers, garment producers, dyers and finishers, and provides environmental testing laboratories, which are considered important and unique. It is also noteworthy that there is a dyeing building to monitor the dyeing stage. The technical inspection services for textile products are offered at competitive prices compared to other laboratories. The Fund has prepared a series of training sessions for companies and government bodies (including, but not limited to, the Egyptian customs authority, universities and technological institutes), aimed at enhancing the export process both from a technical and administrative point of view.

TCF can also help conduct periodic maintenance and necessary repairs, as well as supplying spare parts for laboratory devices used in testing. It is able to facilitate grants from European organisations to ensure that products are exported in the most efficient manner.

The Fund is also accredited by the national authority (EGAC), which issues its accreditation every four years. TCF bears the costs of this accreditation, which requires training and maintenance, as well as machinery calibration to maintain compliance with the specifications set by the EGAC. The laboratories have been evaluated according to the international requirements for facilities involved in all stages of textiles production and testing, from raw materials to finished product.

The environmental testing laboratories are also accredited by the Council, and they are the only laboratories in the Middle East able to conduct this level of testing and analysis. It

is worth noting that the Fund's budget is not included in the state budget and is separate from it.

TCF is currently looking at how to reduce emissions and carbon pollutants, relying on its technical, administrative and logistical staff to meet export standards for European markets. This research requires financial support from relevant grant providers so that employees can benefit from training abroad. It collaborates with European donor agencies in order to secure these benefits so that it can move towards a bright future, aiming for leadership in the fields of technical inspection and training related to textile products.

The Fund participated in bilateral negotiations and agreements with the US, resulting in the establishment of quotas for imports of certain Egyptian textile products to the US. These quotas began in 1975 and continued until 2004 when the quota system was abolished. Then, in the last decade, several of Egypt's spinning and weaving companies were exposed to a number of anti-dumping lawsuits initiated against them by authorities in European Union countries. TCF's management took the initiative to confront these lawsuits and instructed a specialist law firm based in Belgium to defend the interests of Egyptian companies. Eventually, most of the suits were settled without the imposition of any anti-dumping duties, which is an achievement that the Fund takes pride in.

TCF is open to technical cooperation with all international donors, both in the technical and administrative arenas, as suits all parties. The Fund has the capacity to assist the relevant international entities and will be key to the development of the industrial system as the country moves towards its sustainable vision for 2030.



Long staples: a shining pearl in the cotton family



Hong Runxia
General Manager
Changjiang Futures Co. Ltd.

Among the vast family of cotton varieties, long staple cotton stands out for its superior quality and unique characteristics, earning it the title of 'the king of cotton'. Not only is it a key raw material for high-end textiles, it also holds a very important position in the global cotton industry. Let's delve into the world of long staple cotton and explore its mysteries and allure.

The unique charm of long staple cotton

Long staple cotton, sometimes known as Sea Island cotton, is named for its exceptionally long fibres. Distinct from upland cotton varieties (which mostly have a staple length of between 25 and 33 mm), the fibre length of long staple cotton typically ranges from 33 to 45 mm, with the longest fibres reaching 64 mm. This extraordinary length

endows long staple cotton with superior strength and resilience, with a tensile strength of 4 to 5 gram force per fibre. This means that fabrics made from long staple cotton are more durable and less prone to stretching or pilling. The fineness of long staple cotton is such that the fibres measure 7,000 to 8,500 metres per gramme and have a width of 15 to 16 micrometres. The cross-section of the fibres is almost circular, and they have strong light-diffusing capabilities. These characteristics give long staple cotton fabrics excellent dyeing properties and lustre, allowing them to display vivid and long-lasting colours. Additionally, the long and uniform fibres of long staple cotton produce fabrics with a silk-like sheen and drape, providing a soft and skin-friendly



touch that offers consumers the ultimate experience in comfort.

The key features of long staple cotton are summarised here.

Firstly, strength: the fibre or breaking strength of long staple cotton is generally higher than that of coarser cottons, making it much more resilient and durable.

Secondly, it has excellent fineness: its fibres have a smaller diameter and a more circular cross-section, which makes the spun yarn smoother and more uniform.

Thirdly, it has more natural crimps: the number of natural twists on the surface of the fibre is greater, which enhances the cohesion between fibres and improves its spinnability.

Fourthly, it has an attractive, lustrous quality: the smooth fibres reflect the light better creating a sheen.

So, given all the characteristics outlined above, long staple cotton is regarded as one of the best quality cotton varieties in the world and is the ideal raw material for producing high-end textiles.

The main uses of long staple cotton

Due to its excellent properties, long staple cotton is mainly used to produce fabrics that require high-count yarns, creating a high-density fabric with excellent smoothness, strength and lustre.

Particular uses include:

- Luxury shirt fabrics requiring high-count yarns (60-count, 80-count, 100-count or higher), including brocade and Oxford yarns, which are substantial, comfortable to wear, resistant to wrinkling and lustrous.
- High-quality knitted products, such as T-shirts, underwear, and home wear, with great softness, moisture absorption and breathability.
- Luxurious bedding with high thread counts and high density (such as gauze and jacquard fabrics) – soft, smooth, skin-friendly, durable and breathable.
- Fine embroidery thread: its strength

and lustre make it highly suitable for use in embroidery.

- Special industrial fabrics, such as tyre cord yarn and parachute fabrics, which require high-strength fibres.

Growing conditions for long staple cotton

LS cotton yields are influenced by various factors, including planting area, climatic conditions and planting techniques.

Due to the intensive nature of long staple cotton cultivation, planting area tends to be relatively limited. In recent years, as a result of the growing demand for long staple cotton in the market and the government's support for the industry, the area planted to long staple cotton in China has increased. However, overall, it still represents a small proportion of the total area dedicated to the crop.

The changing climate has also created uncertainty about yields. If unfavourable weather conditions occur at critical stages of the crop cycle (for example, heavy rain during the flowering period or low temperatures during boll development) the number of cotton bolls and the quality of fibres will be affected, leading to a decrease in yield. However, as planting techniques have advanced, this impact has been alleviated to a certain extent. The improvement in crop technology has played a key role in increasing the yield of long staple cotton. For instance, by applying precision fertilisation techniques, it is possible to supply nutrients according to the needs of the plant at different growth stages, optimising the use of inputs, promoting cotton growth and development, and increasing yields.

Similarly, the adoption of sophisticated irrigation techniques, such as drip irrigation, can precisely control water supply, meeting the water requirements of plants and avoiding the adverse effects caused by excessive or insufficient watering. So, in all, it is expected that under normal climatic conditions, the long staple cotton yields in China will remain relatively stable and may grow over time as technology progresses.

Long staple cotton is a relatively demanding crop when it comes to its growth environment. It prefers warm and dry conditions, requiring a lot of sunlight and higher temperatures. Generally speaking, the ideal temperature for long staple cotton production is between 20 and 30 degrees Celsius. Also, its growth period is 10/15 days longer than that of upland varieties. Long staple cotton also has particular requirements when it comes to soil, preferring deep, fertile, and well-drained soil. The pH value of the soil should be between 6.0 and 8.5. It needs a certain amount of water as it grows, but it is not tolerant to waterlogging. Therefore, good irrigation and drainage are crucial.

In China, Xinjiang is the main production area for long staple cotton, and the natural conditions here provide unique advantages for its cultivation. The natural conditions in Xinjiang, such as long hours of sunlight and large temperature differences between day and night, are well suited to the heat and light requirements of long staple cotton. The soil conditions in Xinjiang are also ideal, especially in Aksu Prefecture, Southern Xinjiang, which has become the core production area for long staples in China.

Awati County, in Aksu, is the location of over 95 percent of the country's long staple cotton planting area. Local cotton farmers have gained rich experience over the years, continuously optimising their cultivation techniques. From the selection of sowing time to all aspects of field management, they have designed their operations precisely to suit the requirements of long staples. When it comes to planting, farmers often commence sowing after temperatures have stabilised in spring, which ensures that the seeds can germinate well. Throughout the growing period, farmers focus on proper fertilisation, timely irrigation, and the prevention of pests and diseases. Through scientific field management, the quality and yield of long staples in Awati County have been sustained.

However, the cultivation of long staple cotton is not without its difficulties. In recent years, climate change has brought particular challenges for farmers. The increasing

prevalence of extreme weather events, such as high temperatures, droughts and heavy rains, has had adverse effects on the growth of long staples. Local government agencies and research institutions have taken active steps to address these challenges, strengthening the monitoring and warning systems for meteorological disasters, and promoting planting technologies adapted to the changing climate, such as water-saving irrigation techniques and the breeding of drought-resistant varieties, to help farmers reduce weather-related losses.

In 2024/25, official inspection data by late May indicated a volume of less than 44,000 tonnes, but total output, according to local insiders, might be slightly higher than 50,000 tonnes. In 2025, a survey by the local agricultural bureau of Awati suggests that the area planted to long staples is around 180,000 mu.

Planting costs and returns

Long-staple cotton has superior quality characteristics and its market price is usually higher than that of upland cotton, which offers higher potential profits to cotton farmers. Taking Awati County as an example, the income derived from growing long staple cotton is dependent on both yields and price. Through scientific field management, output per mu in some high-yield cotton fields can reach about 300 kilos of seed cotton. Meanwhile the price of long staple cotton can fluctuate greatly, affected by factors such as market supply and demand and international economic conditions. Generally speaking, the long staple seed cotton price in China is 0.5/1 yuan higher per kilo than that of ordinary cotton.

Suppose a cotton farmer plants 100 mu of long staple cotton, with an average yield of 300 kilograms per mu. If the seed cotton price is eight yuan per kilogram, then the total income they can expect is $100 \times 300 \times 8 = 240,000$ yuan. After accounting for seeds, fertilisers, pesticides, irrigation and labour, the cost per mu is approximately 3,000 yuan, and the total cost of cultivating 100 mu is 300,000 yuan. Thus, the net profit of

this cotton farmer would be approximately 240,000 – 300,000 = -60,000 yuan. Of course, these data are used for illustrative purposes only. In reality, if the market conditions are favourable, the seed cotton price will be higher, and in that situation if cotton farmers can manage their costs effectively, their profits will be considerable. In addition, some local governments also provide subsidies for long staple cotton planting, which further increases the actual profits of cotton farmers and stimulates their enthusiasm for growing.

Technological developments

In today's era of rapid technological development, the long staple cotton industry is also actively embracing technology and continuously enhancing the level of modernisation in the sector. Researchers have used techniques such as hybrid breeding and gene editing to cultivate a series of new long staple cotton varieties that are adapted to different planting environments and have excellent traits. These new varieties maintain the quality of long staple cotton fibres while increasing yield, enhancing resistance to pests



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and diseases, and improving adaptability. For example, the 'Xinhai' cotton family of long staple cotton varieties has excellent fibre quality, high yield, and strong adaptability, and is now planted by many farmers across Xinjiang.

The employment of intelligent technologies has made plant management more precise and efficient. By using satellite positioning and Geographic Information Systems (GIS), sowing and the application of fertiliser and irrigation can be optimised. Sensors installed in the fields allow real-time monitoring of soil moisture, nutrient content and meteorological data, providing a basis for decision-making. Drones also play an important role in long staple cotton planting, used for pest and disease monitoring and control, as well as assessing the development of plants. Drones equipped with high-definition cameras and multispectral sensors can quickly capture images of large planted areas, enabling timely detection of disease and pest outbreaks, as well as abnormal growth conditions, supporting farmers to take targeted measures.

Mechanisation and automation have also significantly enhanced efficiency when it comes to harvesting and processing. Advanced cotton harvesters can complete the tasks of stripping, leaf removal, and packaging in one go, reducing labour costs and harvesting time. Equally, the use of automated cleaning, ginning and packaging equipment improves the quality and consistency of cotton processing. There are also opportunities to leverage Big Data and artificial intelligence to improve real-time monitoring and optimisation of cotton processing, further enhancing processing efficiency and product quality.

Outlook for the long staple industry

With the improvement of people's living standards, the demand for high-quality textiles is constantly increasing. As a high-end

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textile raw material, long staple cotton has a broad market appeal. However, the industry also faces some significant challenges, such as how to further increase production and quality, reduce production costs, and cope with climate change. In the future, the long staple cotton industry will continue to rely on technological advances and should keep innovating. By strengthening variety selection, promoting intelligent planting management technologies, and improving the level of mechanisation and automation, the LS sector will be able to achieve sustainable development in the future. At the same time, we will also need to strengthen international cooperation and exchanges, actively expand the market, and enhance the competitiveness of long staple cotton in the international market. It is believed that under the guidance of technology, this brilliant pearl of cotton will shine even more brightly in the future.



The battle of cotton royalty: Pima versus Giza



Jagan Gopinath
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Introduction

In 2022, I stood in the San Joaquin Valley in California, inspecting the SJV Pima cotton crop, as the cool breeze from the Sierra Nevada mountains drifted past me. I couldn't help but think about the stark contrasts between this valley, where SJV Pima thrives, and the Nile Delta, where Giza cotton is grown in Egypt. Both American SJV Pima cotton and Egyptian Giza cotton are revered as the epitome of luxury, renowned for their

extra-long fibres, strength and fineness, making them ideal for high-end textiles. While their similarities have earned them the title of "Cotton Royalty," they each bring unique qualities that set them apart in the world of cotton sourcing.

Cotton quality, spinnability and product characteristics

SJV Pima cotton, grown in California's San Joaquin Valley, is prized worldwide for its consistent quality and superior fibre length. The standard 2-2-48 grade purchased by woven fabric mills in India boasts a staple length over 35 mm, strength above 42 GPT, and a Micronaire range of 3.7 to 4.2. These characteristics contribute to the creation of smooth, durable fabrics with excellent dye absorption, resulting in vibrant, long-lasting colours. Pima cotton fabrics, known for their



softness and resilience, are ideal for premium bedding, apparel and high thread count items.

Giza cotton, especially varieties like Giza 94 and Giza 86, are cultivated in Egypt's Nile Delta. The unique climate, combined with generations of cultivation expertise, has made Giza cotton one of the world's most exclusive. Giza 94, the variety most purchased by woven fabric mills in India, has a staple length of about 34 mm, strength of 40 GPT, and Micronaire in the optimal range. Known for its ultra-soft feel and distinctive lustre, Giza cotton is ideal for premium shirting, bed linens, and lightweight fabrics with a silky finish.

The harvesting methods further distinguish these two cottons. Giza cotton is manually harvested, ensuring that fibres remain intact. Pima, by contrast, is mechanically harvested, resulting in cleaner, contaminant-free fibre. From a spinnability perspective, Pima's superior strength reduces fibre breakages, ensuring efficient and consistent spinning. Pima's ability to retain dye contributes to its vibrant colour outcomes, making it a favourite in colour-sensitive applications.

While ideal for fine yarns, Giza fibres are more delicate, requiring careful handling. Its greater tendency to tangle during spinning presents challenges, but the end result is an exquisitely fine and smooth yarn perfect for lightweight, luxurious fabrics. Giza's natural sheen and inherent softness further elevate its status as a top choice for high-end textiles.

These quality characteristics directly influence the suitability of each cotton type for different products, which in turn affects market pricing and sourcing strategies.

Price discovery for Pima and Giza

Unlike upland long-staple cotton, the price for which is often tied to the ICE cotton futures market, the price of extra-long staple (ELS) cottons like Pima and Giza is shaped by a mix of fundamental supply and demand factors, as well as broader macroeconomic influences, such as exchange rate fluctuations. The regulatory frameworks governing the two cottons further contribute to price dynamics.

For Egyptian cotton, the Alexandria Cotton Exporter's Association (ALCOTEXA) plays a central role. ALCOTEXA regulates the export of Giza cotton by requiring all contracts to be registered with the association, which also sets the selling conditions for each season's cotton varieties. In addition, ALCOTEXA provides mediation and arbitration services to ensure contract integrity and promote good trading practices.

The price of Giza cotton is significantly impacted by Egypt's fluctuating exchange rate, particularly the devaluation of the Egyptian pound. For instance, in the 2021/22 season, the pound depreciated by about 10 to 15 percent, and in 2023/24, it weakened by roughly 20 to 25 percent. A weaker currency makes Egyptian cotton more affordable for international buyers, thereby boosting demand.

In contrast, the pricing of Pima cotton is influenced by a different set of factors. In the US, Supima – an organization founded in 1954 – serves as both a certifying body and a marketing brand for American-grown Pima. Supima's commitment to quality assurance and supply chain traceability, through partnerships with the US Cotton Trust Protocol, adds value to Pima cotton but also raises its cost. These quality assurances come at a premium, contributing to the higher price of Supima-certified Pima.

Water costs are another key factor affecting the price of Pima cotton. In California's San Joaquin Valley, the region's reliance on Sierra Nevada snowmelt for irrigation has become increasingly problematic due to climate change and reduced snowpack. This has driven up water prices and caused some farmers to shift from cotton to more profitable crops, such as almonds and grapes. High water costs and crop shifts have added further pressure to Pima's pricing structure.

Historically, Pima (2-2-48 grade) has commanded a premium of 15 to 20 cents per pound over Giza 94, due to its superior fibre length, strength and contamination-free status. However, the introduction of a minimum support price for seed cotton by the Egyptian government in the 2024/25 season,

set at 12,000 Egyptian pounds per kantar, has disrupted the traditional price gap between the two.

In choosing between SJV Pima and Egyptian Giza, several factors must be carefully weighed. These include the intended end-use, the desired quality of the final product, farming input costs (especially water), currency fluctuations and government policies. All of these variables impact the price spread between Giza and Pima. As a result, sourcing high-quality cottons like Pima and Giza requires not just technical knowledge but also a deep understanding of these interconnected factors, making the process both challenging and intellectually stimulating.

Conclusion: a clash of cotton royalty

When faced with the decision to choose between Pima and Giza, even the most seasoned cotton sourcing professionals may hesitate. I often find myself contemplating the delicate balance between quality, price and the ever-evolving demands of the market. While Pima embodies the perfect blend of durability and luxury, Giza carries with it a centuries-old tradition of refinement and exclusivity. It is fascinating to observe how the rivalry between these two cottons drives innovation in cultivation, harvesting and marketing. Whether you opt for Pima or Giza, you are assured of the finest cotton, delivering unmatched quality and luxury in the textile world.

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Becoming a world-class long staple cotton producer: practices, principles and results



Jonathan Spenser

The Israeli Cotton Production and Marketing Board Ltd

In the global arena of premium cotton, long staple and extra-long staple (ELS) cotton occupy a unique, highly prized niche. Their fibres, known for their exceptional length, strength and fineness, produce superior quality yarns and fabrics that serve the world's top textile brands. But achieving this level of excellence goes far beyond planting seeds and harvesting bolls; it requires a sophisticated blend of science, sustainability, resilience and relentless commitment to quality.

A compelling example of how to reach the pinnacle of long staple cotton production can be found in Israel's cotton sector – a small but influential player that has carved out a reputation for world-class ELS cotton despite harsh environmental and economic constraints. Our story offers valuable lessons for any grower or country aspiring to reach the upper echelon of cotton production.

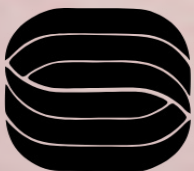
Cultivating resilience: the core of excellence

Becoming a leading ELS cotton producer starts with building resilience into every aspect of production. Resilience, in this context, is the capacity of a farming system to adapt to shocks and stresses – whether they come from climate, market volatility, pests and diseases, or shifting regulatory demands.

Israeli cotton growers, for instance, operate in a semi-arid climate with unpredictable rainfall and increasing water scarcity exacerbated by climate change. Rather than accepting yield stagnation or declining fibre quality, they have transformed these challenges into opportunities for innovation and resilience.

A cornerstone of their strategy is the use of 100% recycled and purified water for irrigation, ensuring that cotton

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production does not compete with domestic or freshwater resources. This approach is complemented by precision irrigation technologies, including advanced drip systems, real-time soil moisture monitoring and precision fertigation. Together, these practices ensure that plants receive exactly what they need, when they need it, optimising water use while minimising waste and environmental impact. This exceptional resource efficiency is critical in a region where water is more valuable than gold and highlights the sector's commitment to sustainable and resilient production.

Science-driven cultivation and variety development

Top-tier ELS cotton production also depends on using the right varieties – seeds bred for superior fibre properties, pest resistance and adaptability to local conditions. Israeli growers work closely with researchers to develop cotton cultivars that not only deliver world-leading fibre length and strength, but also tolerate heat, salinity and pest pressures.

The results speak for themselves. Recent quality parameters for Israel's Pima ELS cotton show fibre lengths of 39–40 mm, micronaire values within premium ranges, and exceptional fibre strength exceeding 43 GPT. These figures rival the best ELS cottons in the world, including Egyptian Giza and American Pima.

Sustainable and regenerative practices

But modern long staple cotton excellence is not only about yield and quality – it must also align with rising demands for sustainability and ethical production. Israeli producers embed sustainability deeply into their operations through regenerative agriculture, conservation tillage, smart crop rotations and biodiversity enhancement.

Soil health is maintained through minimum tillage and the use of cover crops, which help retain soil structure, boost organic matter and

reduce erosion. Pest management relies on integrated pest management (IPM) techniques – using thresholds, targeted application windows and biological controls to minimise chemical use. Precision agriculture tools ensure that inputs are used efficiently and responsibly.

Such practices not only reduce environmental impact but also enhance resilience, enabling crops to withstand droughts, floods and pests with less dependence on external inputs.

Traceability and quality assurance

For premium cotton buyers – leading spinning mills across China, India, Turkey, and Europe – traceability and quality assurance are non-negotiable. Israel's cotton industry has pioneered full traceability, using modern multiple technologies to track fibre from the bale back to the individual grower.

Moreover, all cotton is machine harvested with state-of-the-art equipment, and roller ginned – considered superior to saw ginning for long staple fibres because it preserves fibre length and strength. Comprehensive High Volume Instrument (HVI) testing for length, strength, micronaire, and stickiness ensures that each bale meets the strictest quality specifications.

This rigorous quality control explains why Israeli cotton is exclusively marketed by reputable partners like Otto Stadlander GmbH and remains in high demand among premium textile mills.

Economic stability and market advantage

Long staple cotton production is capital intensive and requires significant upfront investments in irrigation infrastructure, precision farming technologies and modern harvesting and ginning equipment. However, resilience and sustainability pay dividends over time by stabilising yields, ensuring consistent quality and securing premium prices in global markets.

Furthermore, Israeli cotton's full certification under the Better Cotton (BC) standard strengthens its market appeal. Conforming to BC standards signals that the fibre has been produced under best-in-class environmental and social conditions, including decent work principles and responsible farm management.

This competitive edge not only meets the expectations of global buyers but also aligns with the growing trend of brands demanding verified sustainable fibre to meet their own ESG goals.

A model for the future

What does all this mean for other regions aiming to join the ranks of the world's best ELS cotton producers?

Firstly, it requires a commitment to continuous improvement and innovation. Investing in R&D for climate-adapted varieties, precision farming and sustainable practices is non-negotiable. Secondly, growers must embrace data-driven farm management – leveraging technology to optimise every input and output.

Equally important is the creation of robust supply chains and traceability systems that guarantee buyers both the physical and ethical integrity of the fibre. Only then can producers consistently supply the luxury spinning mills and high-end brands that demand absolute certainty about fibre origin, quality and sustainability.

Lastly, industry-wide cooperation is essential. The Israeli success story is underpinned by strong collaboration between growers, research institutions, marketing boards and international partners. This collective approach fosters innovation,

spreads best practices, and ensures that quality standards are maintained across the sector.

In a world where climate risks and shifting consumer expectations redefine agriculture daily, excellence in long staple cotton production is no accident. It is the result of decades of scientific progress, resilient systems, sustainable practices and a commitment to meet the strictest quality and environmental standards.

Israel's cotton growers demonstrate that even in challenging conditions, it is possible to produce some of the world's finest fibres – reliably, sustainably and profitably. For any grower or country aspiring to join the top tier, the roadmap is clear: resilience, sustainability, traceability and quality must be woven together into the very fabric of production.

Quality Parameters 2025-2026			
Variety	Length (HVI)	Micronaire	Strength (HVI)
Israel Pima ELS	39-40 mm	3.7-4.5	43+ GPT
Israel Acalpi LS	34-37 mm	3.4- 4.2	36+ GPT

All Israeli cotton is 100-percent machine picked by John Deere baling pickers and is fully physically traceable from the bale back to the grower using our tracking methodologies and technology.

Israeli cotton is 100-percent roller ginned, 100-percent HVI and stickiness tested, and is now sustainably produced and accredited as BC "Better Cotton".

Israeli cotton is – for the last 15 years – exclusively and successfully marketed by **Otto Stadlander GmbH, Germany** and consumed by the best and leading spinning mills worldwide, in countries including China, India and East Asia, as well as Turkey and Europe.



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