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# Note

## Addressing the Cotton Issue

### The Need for Progress at the 11th WTO Ministerial Conference

#### Summary

For many years, cotton-producing least developed countries have been calling for the WTO to end cotton subsidies, which significantly impact not only their market share but also their livelihoods. This issue note reviews the significance of cotton to LDCs, specifically the C4. It traces developments of WTO negotiations on the cotton issue, making the case for progress and ultimate resolution of the cotton issue, while also reviewing the current trends in the production, trade and subsidization of cotton globally.

## Introduction

Cotton is one of the most important raw materials in the textile industry. It is also of vital importance to the economies of cotton producing, developing countries' economies more especially the Least Developed Countries (LDCs).

Globally an estimated 350 million people are currently involved in the growing or processing of cotton in some manner<sup>1</sup>. Many countries rely on the crop as a major source of foreign exchange earnings, critical for their economic development. The importance of cotton in textile production and its ability to be grown in many climates makes it one of the most marketable crops on the world market.

Moreover cotton growing and processing in developing countries especially LDCs is an integral part of trade and development, which makes it a sensitive crop for these countries since they have the ideal climate conditions for cotton production. The potential for maximally leveraging the cotton sector for LDCs has however been curtailed by fact that huge quantities of the crop produced on the world market are subsidized, especially in that of the larger cotton producing states.

The main challenge regarding cotton stems from the subsidies that cause distortion of the market. Subsidies reduce cotton prices by saturating the market with an abundance of the good. This ends up giving cotton producers in small developing countries and LDCs diminished earnings on their product. Given that cotton production is one of the most important sources of livelihoods of these smaller economies, there is need for disciplines in the multilateral trading system that would lead to

elimination of cotton subsidies in wealthier nations in order to ensure a competitive market and to allow the smaller cotton-growing states the opportunity to harness better returns from the cotton sector, upon which they rely heavily.

Developing countries that produce cotton, especially LDCs are calling for an end to cotton subsidies due to the impact that such subsidies have on their market share. The largest producer of cotton presently is India while the largest exporter is the United States due to its ability to sell it at a very low price. Small cotton producers, such as Mali, Burkina Faso, Benin, and Chad (commonly referred to as the cotton 4 or C4) have, over the years, pursued resolution of the imbalance in international trade of cotton in the WTO, seeking disciplines that would ensure the stability of prices on the world market. Being heavily dependent on cotton, these countries, along with other small cotton producers, are seeking a final and favorable resolution of the cotton issue in the WTO.

This issue note reviews the significance of cotton to LDCs, specifically the C4. The note traces developments of WTO negotiations on the cotton issue, making the case for progress and ultimate resolution of the cotton issue, while also reviewing the current trends in the production, trade and subsidization of cotton globally.

## Significance of Cotton to Least Developed Countries

The development and eventual significance of cotton to LDCs, especially the C4 can be traced back to the European industrial revolution that followed development of a mechanized textile industry,

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<sup>1</sup> "Cotton – a history". New Internationalist. 399. 1 April 2007 9 Nov. 2017

which was supplied by cotton from colonies.

The mid-nineteenth century witnessed increased cotton prices in India a major supplier of the European textile industries, as well as decreased output from America another important source of the commodity at the time, which created the need for alternative sources for the booming textile industry in Europe at the time.<sup>2</sup> Colonies in Africa, where the climatic conditions were favorable for cotton growth were resorted to as alternatives sources for the much needed commodity.

In the case of West Africa, which was largely colonized by France, a public enterprise the *Compagnie Francaise pour le Developpement des Fibres Textile (CFDT)* was created to oversee the production and processing of cotton in the region, which would then supply France's domestic industry with cheap and sufficient quantities it required to effectively compete in the lucrative garment industry.<sup>3</sup> Much later, upon obtaining independence in the nineteen sixties, West African countries continued to develop the cotton sector quite successfully by increasing productivity, value addition and establishing local infrastructure for the production and processing of cotton. Cotton became the leading foreign exchange earner for most of these West African countries. The cotton sector was also the leading employer with the majority of the populations in these countries involved in its production, processing and export processes. Indeed the West African cotton producing region at a point contributed a substantial fifteen percent of world cotton exports.

The booming cotton industry in West Africa had spillover effects that resulted in development of rural

areas where cotton production had extended, hence improving livelihoods of the majority that were involved in the sector. There was also growth and expansion of other sectors such as finance (banking); transport; cotton ginning; sea ports etc. Meanwhile, prosperity of the cotton sector made most of the cotton producing countries increasingly dependent on the sector, whereby cotton exports' contribution to their total exports had reached one third by 2009.<sup>4</sup>

The mid 1990s to 2003 witnessed a global collapse of cotton prices that fell by about fifty four percent, greatly affecting the West African countries that had by then become highly dependent on the cotton sector.

The drastic collapse of cotton prices has been largely attributed to increased subsidies programmes in developed countries. The World Bank Development Indicators report of April 2011 indicated that subsidies programmes in developed countries had pushed production volumes much higher than what the market could absorb hence leading to price cuts of about thirteen percent at the time.

Production of cotton in West Africa is fifty percent cheaper than in developed countries (specifically the EU and US), therefore creating a fair and undistorted international cotton trade market would revive prices to a level where the cotton dependent countries could restore the much needed earnings from the sector.<sup>5</sup>

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<sup>2</sup> Prosper Vokouma Sectoral Initiatives in Favour of Cotton

<sup>3</sup> *ibid*

<sup>4</sup> ITC Trade Map, as of April 2011

<sup>5</sup> The Great Cotton Stitch-up, Fairtrade Foundation

## WTO Negotiations on Cotton

The World Trade Organization (WTO) negotiation mandate on cotton dates back to 2003, when Members agreed to address the cotton issue in light of the C4 proposal that highlighted how their economies that are heavily reliant on cotton were being damaged by low prices of cotton due to subsidies. This followed the lowest cotton price recorded over a twenty (20) year period that was registered in 2001<sup>6</sup>. The cotton initiative hence called for the elimination of subsidies among other remedies to redress and ensure stability of the international cotton market.

Prior to the mandate, the cotton subsidies issue had become highly controversial especially in light of the WTO Dispute Settlement case initiated by Brazil against the US in September 2002. In parallel, Benin on behalf of the C4 submitted a proposal in the WTO titled “Poverty Reduction: Sectoral Initiative in favor of Cotton”<sup>7</sup>. The proposal called for a systematic resolution to measures by developed countries that were gravely affecting some of the poorest Members of the WTO. It sought to include the cotton issue in the Doha round of negotiations, specifically calling for the following:

- Categorizing cotton as a “special product” in light of its importance for agricultural development and livelihoods in cotton dependent LDCs
- Explicit recognition that cotton is critical for development and poverty reduction in LDCs and as such should be given special

attention in ensuring fair access to global markets

- Total elimination of domestic support; border measures; and all forms of subsidies for export of cotton.<sup>8</sup>

With support from the Africa, Caribbean and Pacific (ACP) group, LDC group, as well as many developing and some developed countries, the C4 proposal gained traction and was acknowledged as an important issue at the fifth WTO Ministerial Conference held in Cancun. Thereafter, following intensive negotiations and lobbying by the C4, cotton was included in the so called “July Package” of the WTO in 2004, wherein it was agreed that the cotton issue would be treated “ambitiously, expeditiously and specifically” within the WTO framework.

Subsequently a Sub-committee on Cotton was established and tasked with work on trade-distorting policies affecting the cotton sector under the three pillars of agriculture negotiations (market access, domestic support and export competition).

Since the C4’s cotton initiative in 2003, negotiations to resolve the issue have remained challenging. Incremental progress was made during the 10<sup>th</sup> WTO Ministerial Conference of 2015, where it was agreed to eliminate export subsidies and continue working to eliminate all cotton subsidies<sup>9</sup>. The Ministerial Declaration also provided for duty free quota free market access of LDCs cotton to developed countries, as well as developing countries in a position to extend such market access. In addition, provision of development assistance to LDCs in respect of developing their cotton sector

<sup>6</sup> Sen, Amit. “India Backs African Countries’ Demand for Curbs on Cotton Subsidies at WTO.”The Hindu Business Line, 10 July 2016. 9 Nov 2017

<sup>7</sup> TN/AG/GEN/4

<sup>8</sup> Ibid

<sup>9</sup> “COTTON. MINISTERIAL DECISION OF 19 DECEMBER 2015” World Trade Organization. 21 Dec. 2015. 11 Nov. 2017

was reaffirmed. The Decision also included regular independent monitoring of adherence to this rule and development assistance for developing countries interested in or currently growing cotton.

Nevertheless, the tenth Ministerial Conference Decision on cotton though favorable, remains in general endeavor language with no binding obligations to ultimately resolve the cotton issue. The forthcoming Ministerial Conference presents another opportunity to finally resolve this important issue for LDCs especially the C4 that are heavily dependent on the cotton sector.

In the drive to the eleventh Ministerial Conference a number of proposals have been submitted with regard to the cotton issue. These include proposals by Brazil, European Union, Colombia, Peru and Uruguay<sup>10</sup>; Benin on behalf of the LDC Group<sup>11</sup>; Argentina; as well as by the C4<sup>12</sup>. The proposals inter alia call for redress of trade distorting support to cotton, with a number of approaches suggested in the proposals.

The C4 proposal provides greater detail on the range of issues that should be addressed in the forthcoming Ministerial Conference including transparency requirements in the “Green Box” support; implementation period with respect to decisions on market access; export competition; and development; as well as implementation and follow up<sup>13</sup>. In addition, the LDC group of which the C4 are also members calls for urgent action in cutting farming subsidies and implementing a “ceiling” on

domestic subsidies.<sup>14</sup>

The Food and Agriculture Organization has also called for progress on eliminating cotton subsidies, emphasizing the need for changes to be made in order to catalyze development and growth among cotton exporting LDCs<sup>15</sup>. It calls for protecting smallholder farmers and for making bilateral and multilateral trade deals that protect workers in developing countries to be a priority.

## Current Trends: Cotton Production and Subsidies

### Production

According to the US department of Agriculture, in the period 2016-2017, India had the highest level of cotton production in the world. As seen in graph one, the top 3 cotton producing states are India, the US, and China. These states all subsidize cotton production, although the C4 consider India to be equally affected by the subsidies in other developed states.<sup>2</sup> China on the other hand is not a major exporter of cotton, preferring to use its production at home or store it, which may cause additional distortions in the market, but the most important issue in the international cotton market is distortion caused by actual exporters.

<sup>10</sup> “EU and Brazil Join Forces for Global Level-Playing Field in Farm Subsidies.” *European Commission Press Release Database, European Commission*, 17 July 2017. 10 Nov 2017.

<sup>11</sup> Kanth, D Ravi. “LDCs Push for Concrete Outcomes at MC11 on Agri Domestic Support.” *Third World Network*, 23 Jan. 2017. 9 Nov 2017.

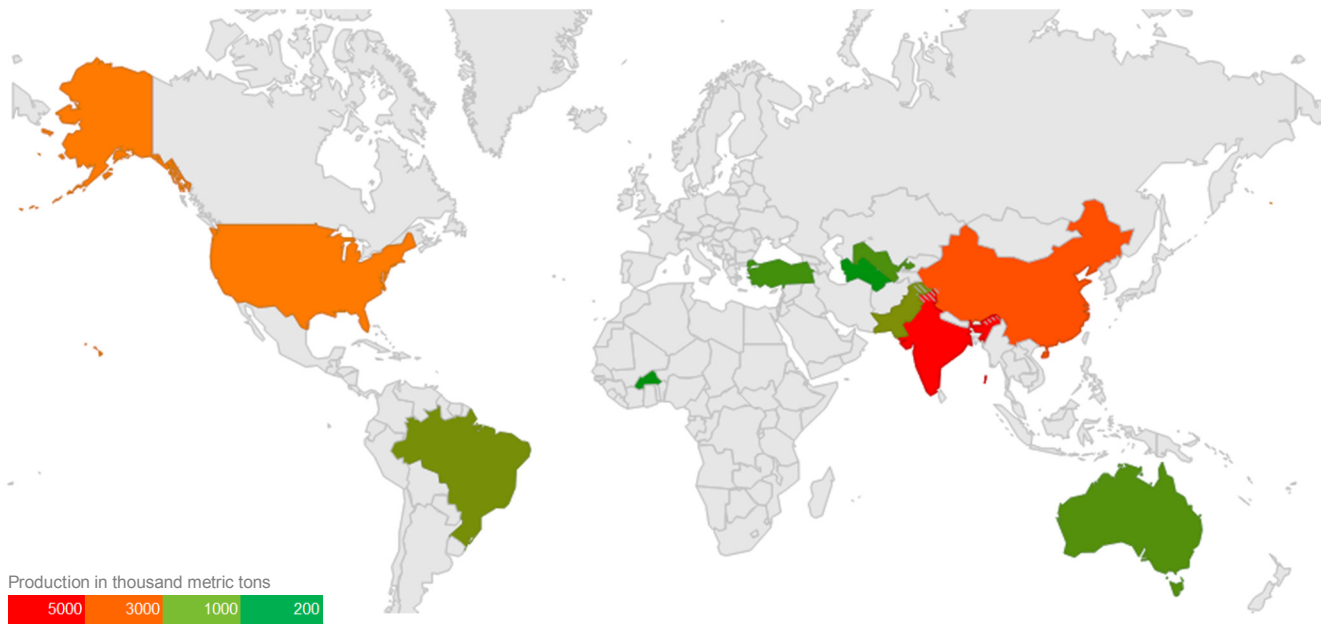
<sup>12</sup> “WTO Committee on Agriculture: Preparing the ground for success at MC11” *TRALAC*. 10/25/2017. 9 Nov 2017

<sup>13</sup> “Briefing Note: Cotton Negotiations.” *World Trade Organization* 7/30/2017. 30 Oct. 2017

<sup>14</sup> Summary of proposals is at Annex A.

<sup>15</sup> “FAO Calls On WTO Ministerial Conference To Protect Small Farmers.” *Food and Agriculture Organization of the United Nations, United Nations*, 25 Oct 2017 9 Nov. 2017.

**Graph 1: Top Cotton Producers (2016-2017)**

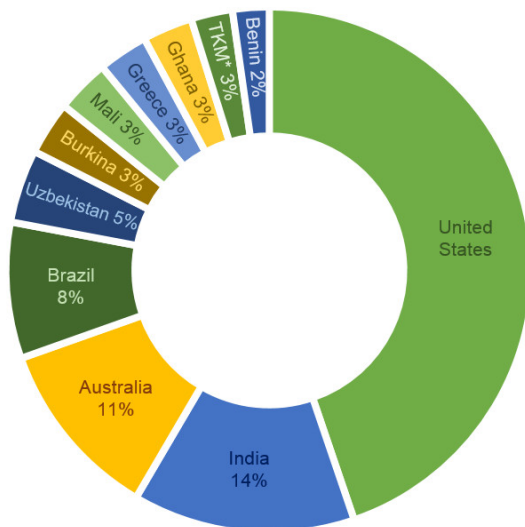


Source: Cotton.org, Statista (Accessed: 11/11/ 2017)

As seen in graph 2, the US is the largest exporter of cotton by far, which is why the C4 and WTO negotiations have focused on its subsidies, especially when it sells cotton at very low prices, hurting the chances for developing states to sell their own, or develop the sector which has become less lucrative.

In Graph 3, we see how cotton prices dropped to the lowest price back in 2001. The impact of the dramatic drop in price and its effects on LDCs dependent on cotton, has persisted as exhibited by the slow price growth, which indicates the continued need for resolution of the cotton issue in the interest of heavily dependent cotton producing countries, particularly LDCs, and more especially the C4.

**Graph 2: Top Cotton Exporters (2016-17)**



\*TKM: Turkmenistan

Source: Cotton.org, Statista (Accessed 11/9/2017)

**Graph 3: Trends of Cotton Prices (USD/Pound)**



Source: USDA Agricultural Marketing Services (Accessed: 11/11/2017)

## Subsidies

The International Cotton Advisory Committee (ICAC) has been reporting on government support measures in cotton since 1997/98, keeping records of the number of governments that provide support measures to their cotton producers, the different programs under which these support measures are organized, as well as an estimated amount of the financial volume of the support measures provided. ICAC's definition of subsidies to the cotton sector comprises direct support to production, border protection, crop insurance subsidies and minimum support price mechanisms. The most recent report analyses governments' support measures in cotton in 2015/16, estimating that governments provided subsidies in the amount of \$7.2 billion in that period. In comparison to the total amount of subsidies to the cotton sector in 2014/15, this was a 30 per cent

decline.<sup>16</sup>

In its 2016 report, the ICAC Secretariat emphasizes that there has been a strong negative correlation between subsidies and cotton prices ever since record keeping began. The fact that subsidies were rising in those years when the prices for cotton were low indicates that governments have been intervening to support their local cotton producers, thereby distorting the international trade of cotton.

Graph 4 presents the aggregated estimated annual assistance provided by governments to the Cotton sector since 1997/98. Three main aspects stand out when regarding the development of cotton subsidies over time<sup>17</sup>: firstly, the average assistance per pound of cotton produced provided in 2015/16 has increased by 67 per cent in comparison to the average assistance per pound provided in 1997/98.

<sup>16</sup> ICAC Production and Trade Policies Affecting the Cotton Industry. Secretariat Report October 2016, p. 1.

<sup>17</sup> Ibid. Figures for 2015/16 are preliminary.

**Graph 4: Estimated Cotton Assistance Provided by Governments**



Source: ICAC Secretary Report 2016

Secondly, both the world production and the average assistance per pound produced have been subject to strong fluctuations, with the latter coming to a head in 2014/15, but decreasing in the succeeding year. However, as indicated above, the most recent level of production and average assistance per product produced was above both the level of production and provided subsidies in 1997/98.

Thirdly, the ICAC Secretariat emphasizes that an estimated 76 per cent of the world cotton production received direct government assistance in 2015/16, which constituted a significant increase to the share of 55 per cent of world cotton production receiving direct government assistance in 1997/98.<sup>18</sup>

In combination, these findings indicate that the issue of high subsidies to the cotton sector remains a pressing one.

Disaggregating the figures on subsidies provided to

the cotton sector in the seasons 2014/15 and 2015/16 allows to identify which governments give the most considerable financial assistance to their cotton producers. Table 1 illustrates that Spain, China, Greece, Turkey and the United States are heading the list of governments that provide the highest average assistance per pound produced (in US Cents), in the order mentioned above.

With regard to the total assistance to cotton production (in US\$ millions), China (\$5,289 millions) and the USA (\$1,103 millions) are the leaders, a long way ahead of the rest. Considering the role of the USA as the largest cotton exporter, its high level of assistance to production is trade-distorting and severely affects LDCs dependent on cotton production.

In case of China, although its high level of subsidies does not have a direct negative impact on the global cotton market, since the government stocks the produced cotton instead of releasing it on the global market, the potential threat of massive cotton surpluses to be released from Chinese stocks at artificially low prices in the future remains a concern.

Focusing on the subsidies to the Cotton Sector provided by the EU, the effect of Spain's subsidies programme could be considered minimal, given that its production was relatively low in 2014/15 and 2015/16. On the other hand, the amount of cotton produced by Greece was been considerable in both these seasons. Given the fact that Greece exports a large share of its produced cotton (Graph 2), the high subsidies to its production provided by the EU have a direct negative impact on the global cotton market.

<sup>18</sup> Ibid, p. 1.



**Table 1: Estimated Assistance Provided by Governments to the Cotton Sector**

Country	2014/15			2015/16		
	Production	Average Assistance per Pound Produced	Assistance to Production	Production	Average Assistance per Pound Produced	Assistance to Production
	1,000 tons	US cents	US\$ Millions	1,000 tons	US cents	US\$ Millions
China	6,500	57	8,220	4,820	50	5,289
USA	3,553	11	861	2,806	18	1,103
Turkey	754	27	452	660	26	381
Greece	273	39	238	218	43	208
Spain	75	44	72	56	55	68
India	6,460	4	631	5,749	0	51
Burkina Faso	298	5	30	244	6	30
Mali	233	5	26	216	5	26
Cote D'Ivoire	193	3	14	177	4	14
Colombia	27	9	5	22	6	3
Senegal	9	10	2	12	8	2
Brazil	1,563	3	102	1,348	0	0
All countries	19,937	21	10,653	14,980	18	7,175

Source: ICAC Secretary Report 2016

In the same period, 2014/15 and 2015/16, India was the largest producer of cotton, but since it only provided assistance to production in the amount of \$51 million (2015/16), its average assistance per pound procured amounted to, rounded, zero US cents.

## Conclusion

It is generally agreed that subsidies are the leading cause of low cotton prices in the global trading system. Moreover these are provided by developed and large developing countries. Impacts of the subsidies have curtailed and substantially affected development of LDCs more so those heavily dependent on the crop for economic survival.

WTO Members, already agreed in the “2004 July package” to address the cotton issue “ambitiously, expeditiously, and specifically”. Given that subsidies have continued to impact the cotton market negatively, a resolution to the cotton issue remains a priority for not only the C4 but the welfare of the cotton dependent producers in other LDCs and small developing countries.

The forthcoming WTO Ministerial Conference (MC11) presents yet another opportunity to finally resolve the cotton issue, nevertheless this would require continued efforts in pushing the cotton agenda, not only by the C4 who are the principle proponents, but also all other members with a significant say in the matter.

# Annex 1: Current Proposals on the Cotton Issue – November 2017<sup>19</sup>

## C4 Proposal

Limit on overall trade-distorting support (OTDS) for cotton: AMS, Blue Box and de minimis

- 1 Trade-distorting domestic support for cotton (AMS, Blue Box, de minimis) shall be limited as follows:
  - . Developed country Members:
    - i. Where the final bound total Aggregate Measurement of Support (AMS) is greater than US\$40 billion, or the equivalent in the monetary terms in which the binding is expressed, the reduction shall be 90%;
    - ii. where the final bound total AMS is greater than US\$15 billion and less than or equal to US\$40 billion, or the equivalent in the monetary terms in which the binding is expressed, the reduction shall be 80%;
    - iii. where the final bound total AMS is less than or equal to US\$15 billion, or the equivalent in the monetary terms in which the binding is expressed, the rate of reduction shall be 70%.
    - iv. The reduction in AMS support for cotton applicable to developing country Members with final bound total AMS commitments shall be two thirds (2/3) of the reduction applicable for developed country Members, in accordance with paragraph (a) above.
    - v. The reduction percentages provided for in paragraphs (a) and (b) are applied to the base value of support calculated as the arithmetic average of the amounts notified by Members for cotton in supporting tables DS:3 and DS:4 from 2009 to 2013.
    - vi. Developed country Members and developing country Members shall refrain from granting cotton producers a cumulative amount of AMS support and support falling within the scope of Article 6.5 of the Agreement on Agriculture that exceeds the monetary limit that would result from the application of the de minimis entitlements under Article 6.4 of the Agreement on Agriculture.

Further to Article 6.5 of the Agreement on Agriculture, any direct payment made, where appropriate, under production-limiting programmes in favour of cotton producers, shall be included in the limit for cotton as specified in paragraph 1 above.

## Benin on Behalf of the LDC Group

In view of the urgent need to tackle harmful trade-distorting subsidies and to achieve some long-awaited progress in this area, the negotiations must aim for agreement on a first set of outcomes on development between now and MC11. These outcomes should include the following elements: [...]

- An overall limit on the sum of all trade-distorting domestic support measures for cotton. To set such a limit, a number of options are available, including one or several of the following methods:
  - a fixed numerical limit on domestic support specific to cotton;
  - a limit defined as a percentage of the value of production of cotton;
  - a limit on trade-distorting cotton support measures defined as a maximum percentage of all product-specific support;
  - a limit on transfers to cotton producers expressed as a percentage of gross agricultural revenue from cotton

## Argentina

In accordance with the Ministerial mandate to address cotton ambitiously, expeditiously and specifically, Members shall agree to an overall limit, as defined in paragraphs 1 and 2, on all the trade-distorting domestic support provided under articles 6.3 and 6.4 for cotton at [X%] of the cotton value of production.

Members shall review the impact on trade of the product-specific limit for cotton no later than [2019] with a view to agreeing on the next steps to be taken in phasing out trade-distorting domestic support provided for cotton.

Members shall not provide trade-distorting domestic support which taken in aggregate exceeds a monetary limit (hereafter "base

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<sup>19</sup> Adapted from the Compilation Document – Committee on Agriculture in Special Session of 9<sup>th</sup> November 2017.

cap"), in accordance with the following commitments.

The base cap shall be no greater than the larger of:

Option A.: Double the Member's de minimis percentage of its average value of total agricultural production in the period [2011-2015];

Option B.: [110%] of the average Articles 6.3 and 6.4 support notified by the Member for [the most recent three notified years at the date of adoption]; or

Option C. For developing country Members, [US\$2.0bn] or equivalent in local currency.

## **Proposal by Brazil, European Union, Colombia, Peru and Uruguay**

In accordance with the Ministerial mandate to address cotton ambitiously, expeditiously and specifically, Members shall agree to an overall limit, as defined in paragraph [1] on all the trade-distorting domestic support provided for cotton at [W%] of the cotton value of production.

10. Members shall review the impact on trade of the product-specific limit for cotton no later than [2019] with a view to agreeing on the next steps to be taken in phasing out trade-distorting domestic support provided for cotton.

[Paragraphs 1 and 2:

1. 1.A) Developed Members shall not provide trade-distorting domestic support in excess of [X%] of the total value of agricultural production as of [2018], while developing Members shall not provide trade-distorting domestic support in excess of [X+2%] of the total value of agricultural production as of [2022]. This paragraph shall not apply to least developed Members.

OR

B) Developed Members shall not provide trade-distorting domestic support in excess of [X%] of the total value of agricultural production as of [2018], while Developing Members shall not provide trade-distorting domestic support in excess of [X%] as of [XXXX]. From [2022] until [XXXX], developing Members shall not provide trade-distorting domestic support in excess of [X+Y%] of the total value of agricultural production. This paragraph shall not apply to least developed Members.

2. 2. Trade-distorting domestic support shall include the domestic support referred to in Articles 6.3 and 6.4 of the Agreement on Agriculture. Members agree to the objective of including Blue Box support (Article 6.5) in the overall ceiling referred to in paragraph 1, subject to the terms to be defined by [MC12]. The negotiations to do so should take into account:

1. (a) That Blue Box support does not have the trade-distorting effect of Amber Box support and so should be accounted for differently, thus ensuring a continued incentive for Members to use the Blue Box to move away from Amber Box support.
2. (b) The need for adequate transitional periods.

(c) The efforts already made by those Members who have used the Blue Box by the date of this decision to move away from Amber Box support in a manner that is compatible with the objectives of this decision.

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37-39, Rue de Vermont, 1202 Geneva, Switzerland

[geneva@cuts.org](mailto:geneva@cuts.org) • [www.cuts-geneva.org](http://www.cuts-geneva.org)

Ph: +41 (0) 22 734 60 80 | Fax:+41 (0) 22 734 39 14 | Skype: cuts.grc

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