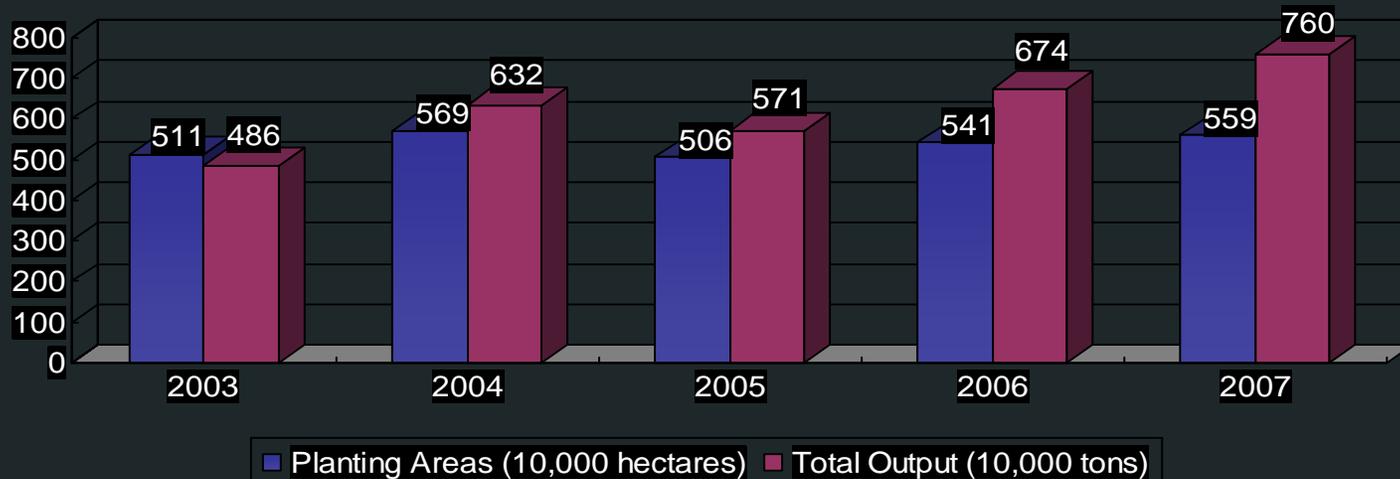


China Cotton & Cotton Seed Industry Report, 2007-2008



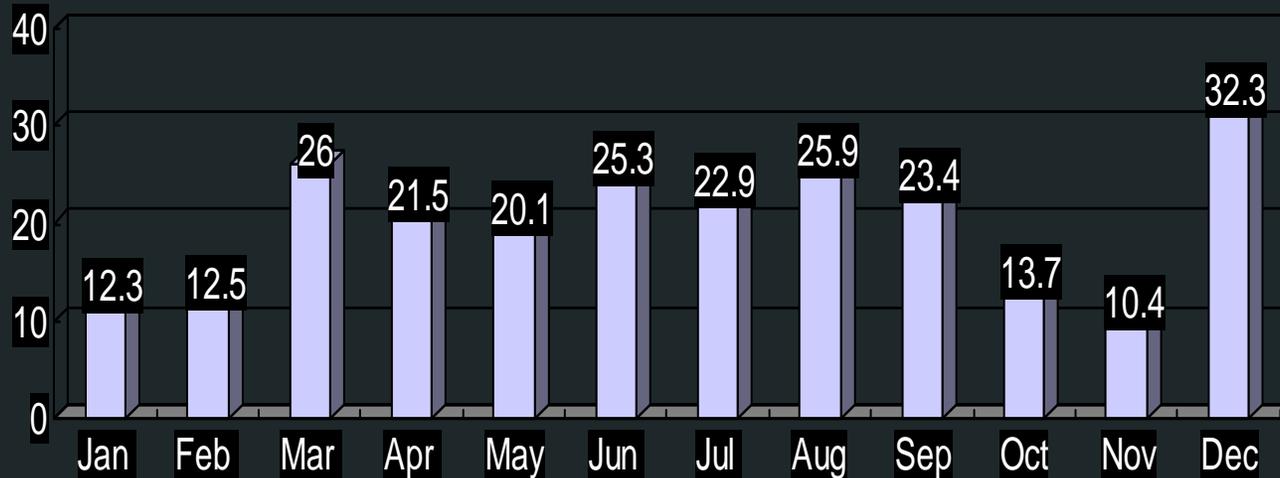
- In 2007, China launched a series of policies, including subsidy to high quality cotton seed and policy insurance. According to the "Eleventh Five-Year Plan" (2006-2010), China plans to accelerate the construction of high-quality cotton production base in Xinjiang Uygur Autonomous Region by investing CNY750 million, all of which have greatly enhanced the enthusiasm of farmers to plant cotton. Statistics from the National Bureau of Statistics show that China's total cotton planting area reached 5.59 million hectares in 2007, up 3.3% year on year, and cotton output in the year reached 7.6 million tons, up 12.6% against the previous year.

Changes of China Cotton Planting Areas and Total Cotton Output, 2003-2007



- In 2007, China imported 2.46 million tons of cotton, down 32.5% against the previous year, which was caused mainly by the following three factors.
- 1) A rise in cotton output at home
- 2) A slowdown in the growth of China's textile and apparel exports. In 2007, China's textile and apparel exports reached US\$171.17 billion, up 16.5% year on year, but 8.5 percentage points lower than a year ago.
- 3) An increase in prices of imported cotton. In 2007, the average price of imported cotton in China was US\$1,415 per ton, up 5.6% year on year, due to the impact of several factors, including U.S. cancellation of subsidies to cotton export, anticipated reduction of cotton output in international market and price hikes in global agricultural products.

Changes of China Cotton Import Volume in Jan.-Dec.,2007



- Statistics from the National Bureau of Statistics show that in 2007, China's total spinning output produced by companies above designated size (company with an annual sales revenue over CNY5 million) reached 19.94 million tons, up 14.6% year on year, or an addition of 2.54 million tons. Based on the calculation by cotton spinning ratio of 55%, the lowest one regarded by the industry, China's cotton consumption in the year would likely be 10.96 million tons and the gap would likely be around one million tons.

- Based on the authoritative and abundant information from the National Bureau of Statistics, the China Cotton Association and the General Administration of Customs of China, this report makes an in-depth study on the market status, main policies, supply & demand and key companies of cotton industry and forecasts the supply and demand as well as the development trend of cotton and its seed industry in the period of October, 2007 to September, 2008.



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