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Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division
Web: https://ipad.fas.usda.gov

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Commodity Intelligence Report

African Franc Zone Cotton: Favorable 2021/22 Production Prospects After Near Record Area Planted

West Africa's Franc Zone cotton production prospects for marketing year (MY) 2021/22 are favorable after a near record area was planted and weather was favorable for crop establishment and development from June through early September. USDA forecasts Mali to be the largest cotton producer in Africa for MY 2021/22, followed by Benin, Côte d'Ivoire, and Burkina Faso (Figure 1). Mali planted a record area of 795,000 hectares (ha), up 630,000 hectares (382 percent) from last year's boycotted crop. Côte d'Ivoire also planted a record crop area of 460,000 ha, while Benin and Burkina Faso each planted over 600,000 hectares this year.

The African Franc Zone, as defined by USDA's World Agricultural Supply and Demand Estimates (WASDE), comprises of ten francophone countries in West Africa and total cotton output during the past three years ranks the region as the world's sixth largest cotton producer (Figure 2). USDA forecasts MY 2021/22 cotton production for the African Franc Zone at near record 5.86 million 480-pound bales, up 1.0 million bales (21 percent) from last year and down 59,000 bales (1 percent) from the MY 2019/20 record crop (Figure 3). Harvested area is forecast at 3.1 million hectares, up 710,000 hectares (29 percent) from last year and down 5,000 hectares from the MY 2019/20 record area. The forecast yield of 408 kilograms per hectare is nearly equal to the 5-year average yield.

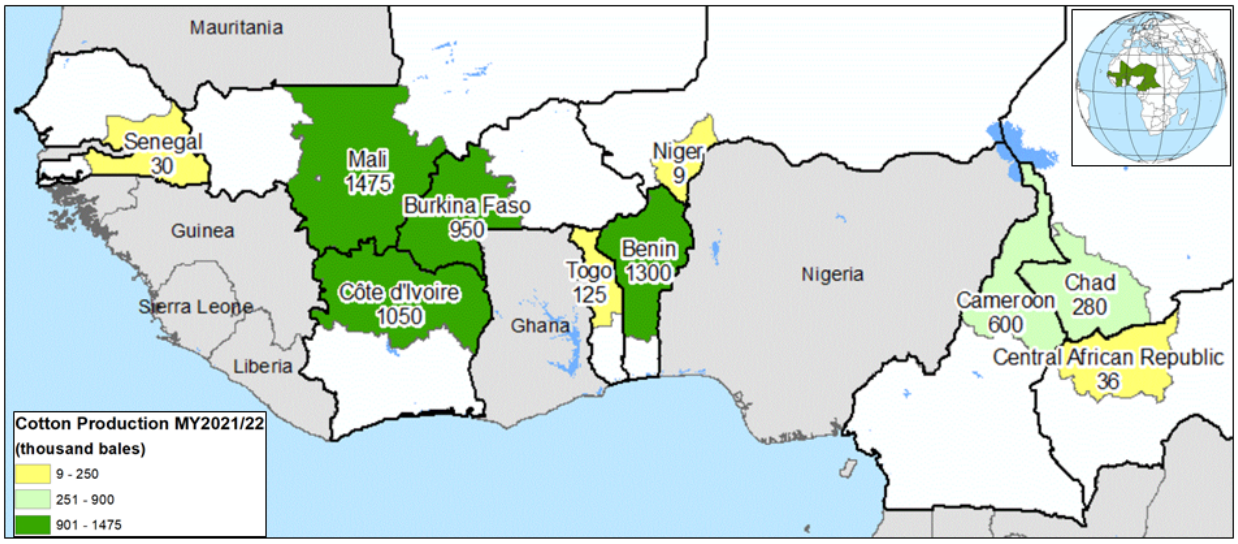
Cotton for the African Franc Zone is sown from May to July and harvest occurs from October through December. Most of the crop is planted in June, expect for Senegal where the optimal month for planting cotton is July (Figure 4). According to regional crop planting reports, timely onset of rains in June allowed most countries to achieve over 90 percent of their planted area targets by late July, while dry spells during June and July delayed planting for Togo and Benin. Togo also planted below their cotton area expectations due to low farm gate prices persuading many cotton growers to shift to other crops

Crop conditions are good to excellent in early September after most major cotton producing regions received average to above-average rainfall from June 1 through September 10 (Figure 5). Above-average rains in August also boosted soil moisture reserves and helped late planted crops recover from a delayed crop season. Satellite-derived Percent of Average Seasonal Greenness (PASG) and Normalized Difference Vegetation Index (NDVI) measurements indicate that crop conditions in early September range from average to above-average for most of the region (Figure 6).

The Sikasso region in southern Mali is one of the largest cotton producing regions for the African Franc Zone and it produces approximately 65 percent of Mali's total output. Cumulative precipitation for Sikasso region was above average from June through September and cropland NDVI measurements were average to above average by mid-September (Figures 7 and 8). Cotton bolls started to open in early September for the Sikasso region (Figure 9), and harvest is from late October through December.

In summary, USDA forecasts a near record crop for West Africa's Franc Zone region based on timely rains for planting in June and a near record area planted by late July. The forecast yield of average yields for the region is based on seasonal precipitation and cropland NDVI measurements being average to above average from June through early September.

African Franc Zone 2021/22 Cotton Production Summary



African Franc Zone, as defined by WASDE, includes the following ten countries in order of MY 2021/22 production: Mali, Benin, Cote d'Ivoire, Burkina Faso, Cameroon, Chad, Togo, Central African Republic, Senegal, and Niger.

	MY 2021/2022F		
Country	Area (1000 ha)	Prod (1000 bales)	Yield (kg/ha)
Mali	795	1475	404
Benin	620	1300	457
Cote d'Ivoire	460	1050	497
Burkina Faso	610	950	339
Cameroon	230	600	568
Chad	250	280	244
Togo	100	125	272
CAR	34	36	231
Senegal	19	30	344
Niger	5	9	392
Total	3123	5855	408

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Source: PSD Online (MY 2021/22 Cotton Production)

Figure 1. Summary MY 2021/22 Cotton Production for the African Franc Zone.
Source: PSD Online

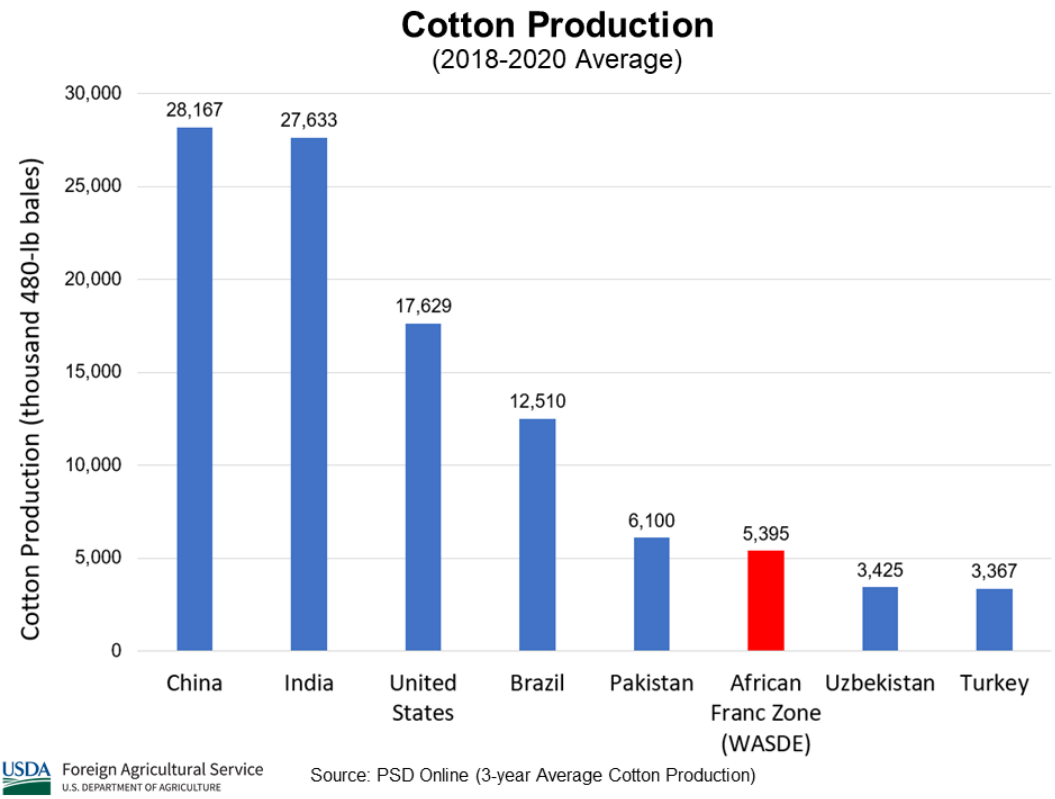

Figure 2. African Franc Zone (WASDE), world's sixth largest cotton output during the past three years. Source: PSD Online

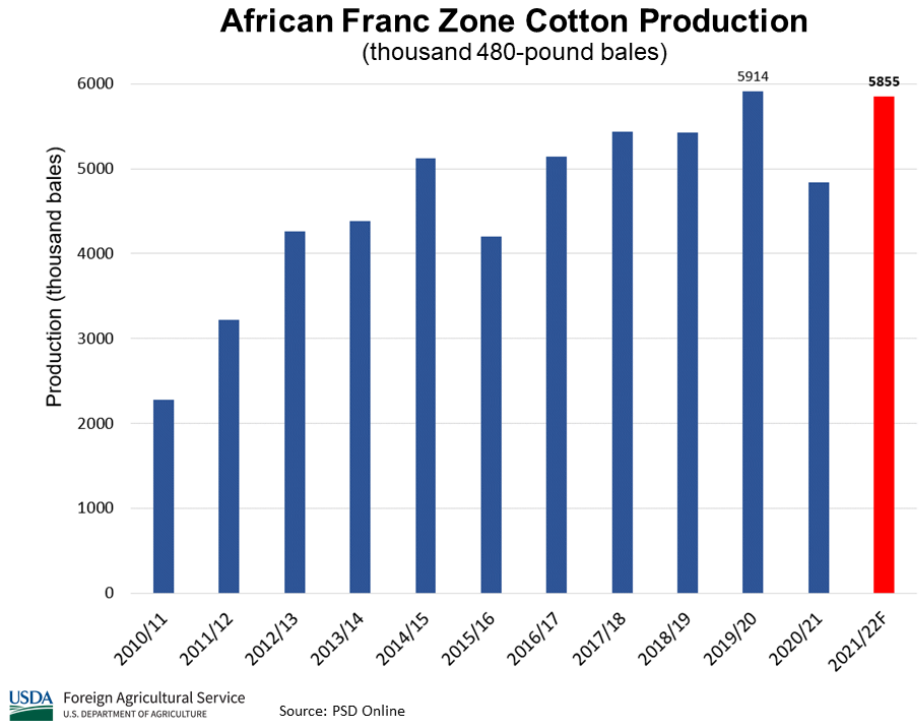

Figure 3. Near record MY 2021/22 Cotton Production for the African Franc Zone. Source: PSD Online

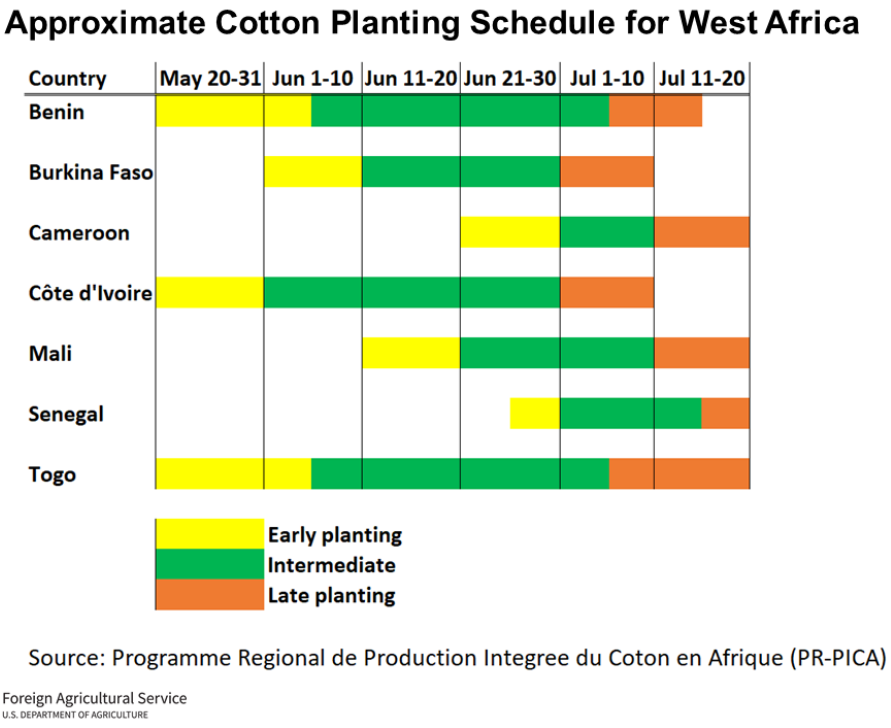

Figure 4. Approximate Cotton Planting Schedule for West Africa.
Source: PR-PICA

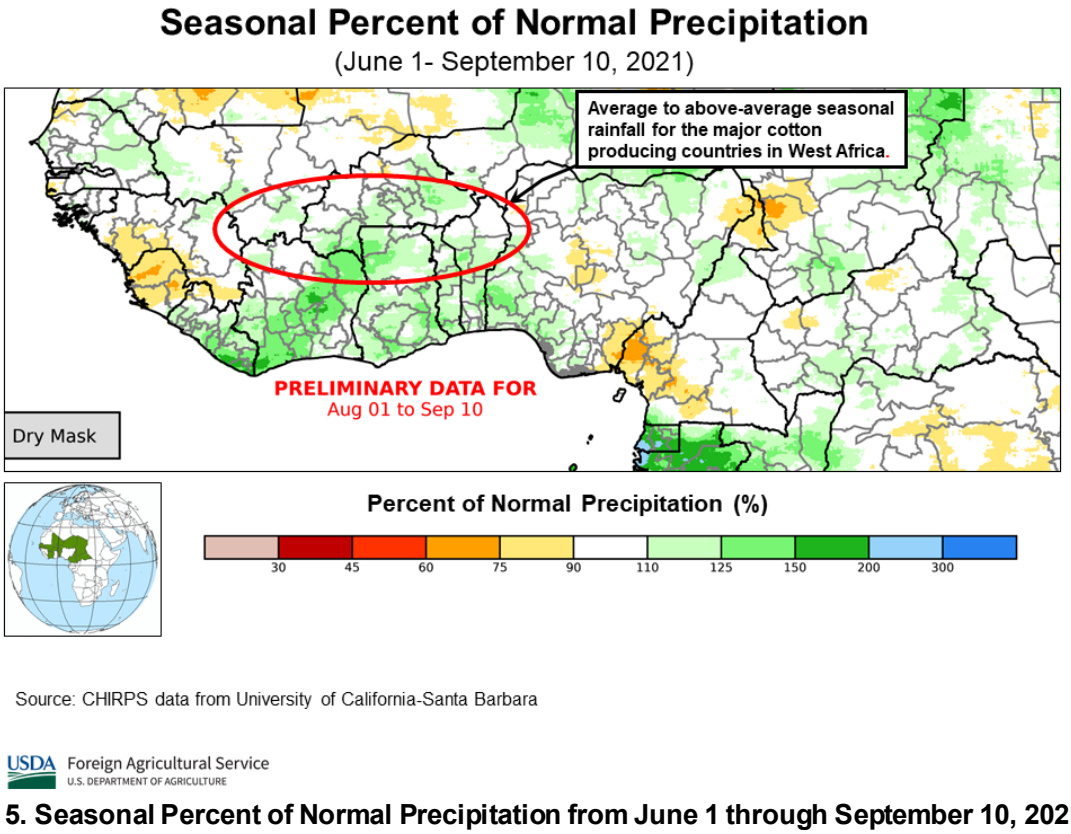

Figure 5. Seasonal Percent of Normal Precipitation from June 1 through September 10, 2021.
Source: UC Santa Barbara Climate Research Group

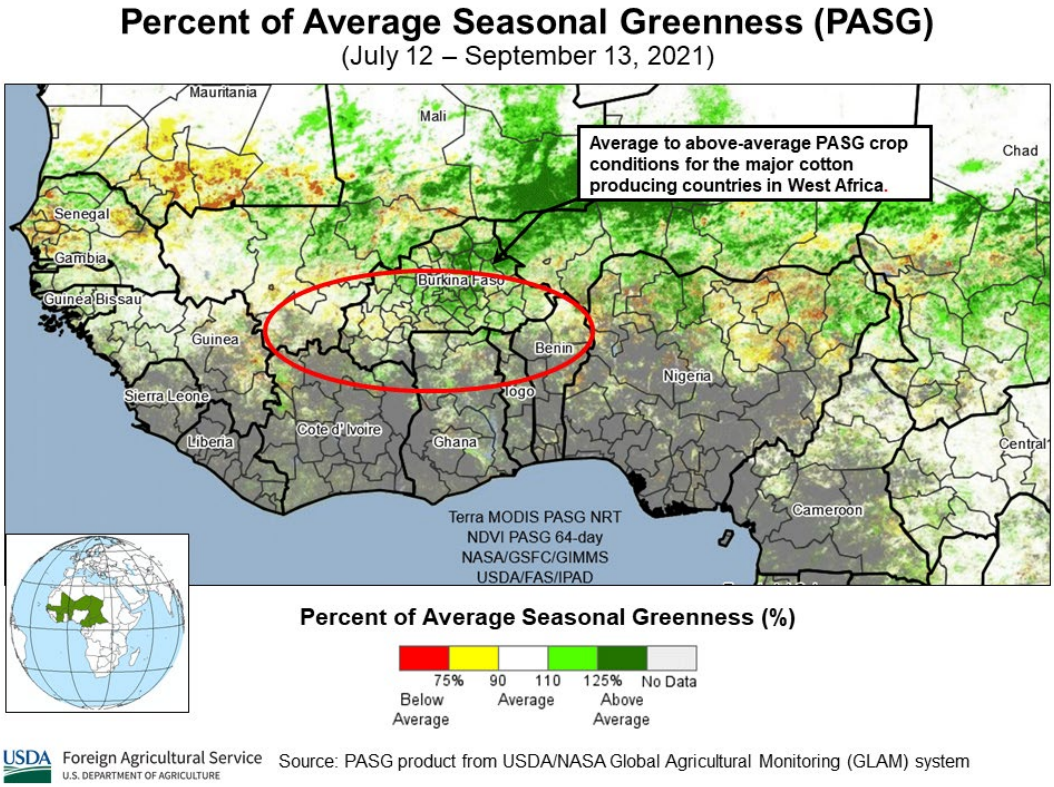

Figure 6. Percent of Average Seasonal Greenness (PASG) from July 12 through September 13, 2021. Source: NDVI composites from USDA/NASA Global Agricultural Monitoring (GLAM) system

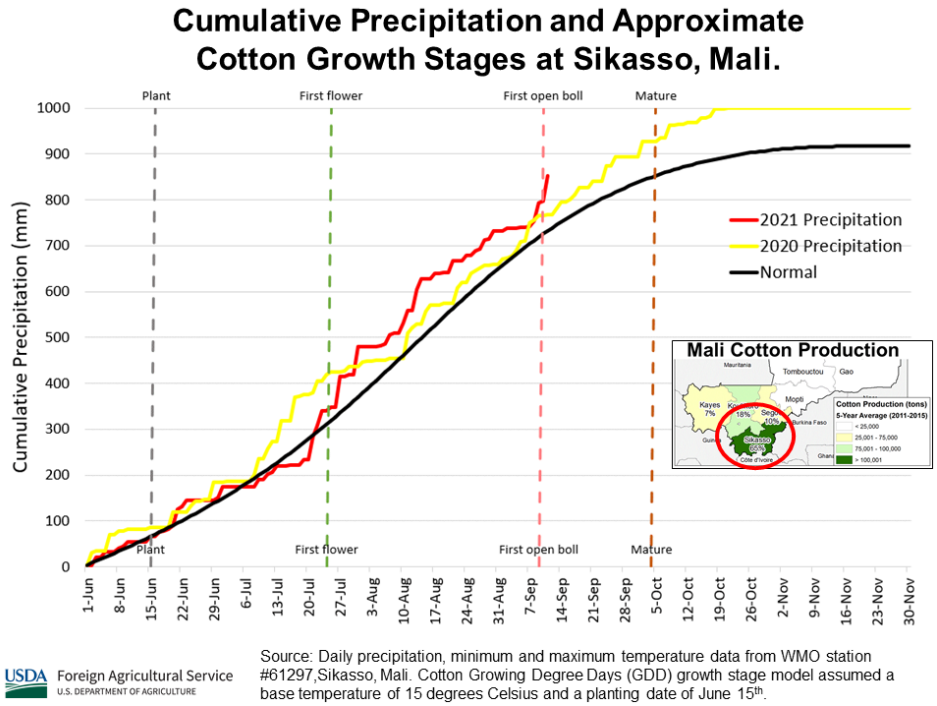

Figure 7. Cumulative Precipitation from June 1 through September 11, 2021 for Sikasso, Mali. Source: WMO station data and USDA-FAS Growing Degree Day (GDD) growth stage model

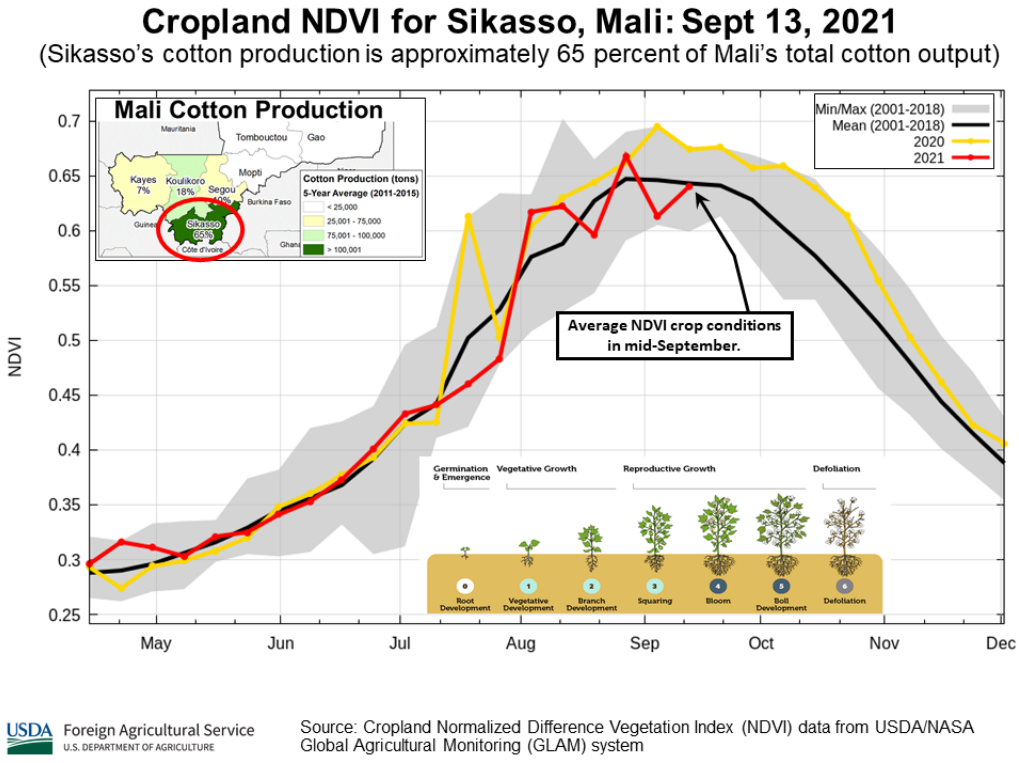

Figure 8. Cropland NDVI crop conditions for Sikasso, Mali.
Source: NDVI composites from USDA/NASA Global Agricultural Monitoring (GLAM) system

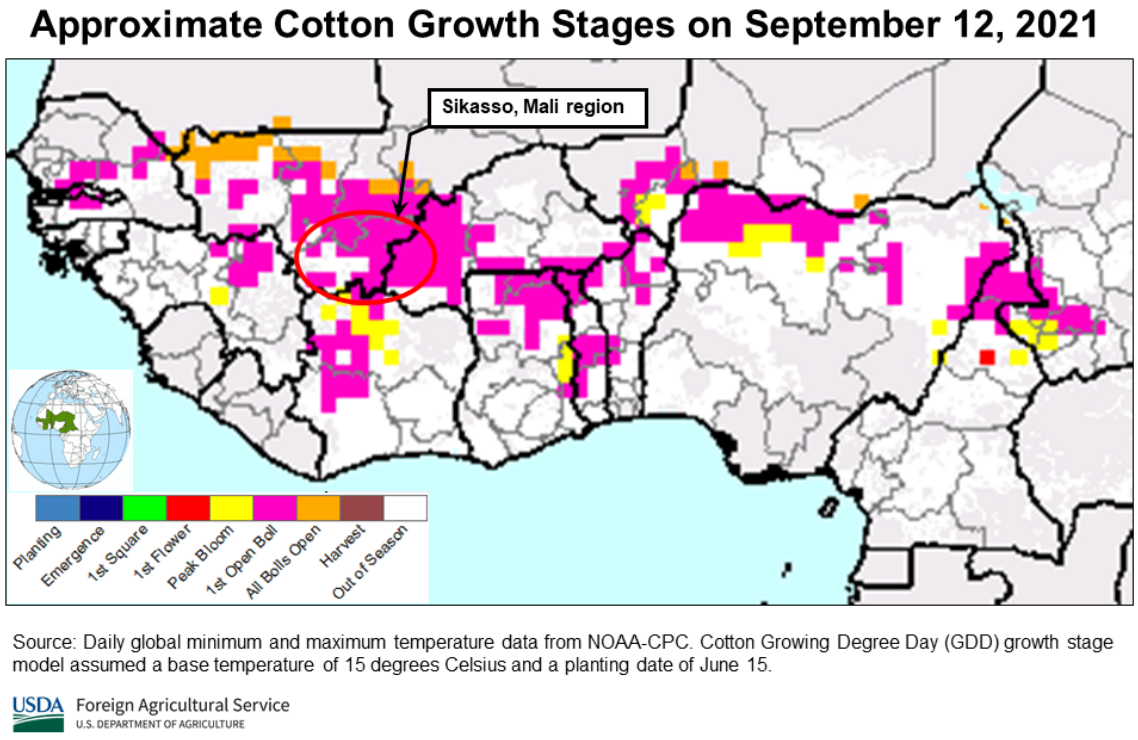

Figure 9. Approximate Cotton Growth Stages on September 12, 2021.
Source: NOAA-CPC and USDA-FAS Growing Degree Day (GDD) growth stage model

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