

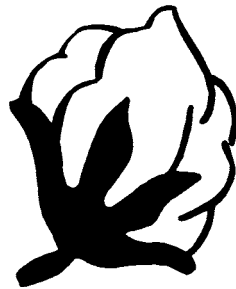
PROCEEDINGS

65th Plenary Meeting of the
International Cotton
Advisory Committee

Goiania, Brazil
September 2006

**PROCEEDINGS
OF THE
65th PLENARY MEETING**

**“Social and Environmental Impacts of Cotton
Production and Use”**



ICAC
Washington DC USA

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Price: US\$55.00

FOREWORD

At the invitation of the Government of Brazil, the 65th Plenary Meeting of the International Cotton Advisory Committee was held in Goiania, from 11-15 September 2006.

The International Cotton Advisory Committee is an association of governments having an interest in the production, export, import and consumption of cotton. It is an organization designed to promote cooperation in the solution of cotton problems, particularly those of international scope and significance.

The functions of the International Cotton Advisory Committee, as defined in the Rules and Regulations, are

- To observe and keep in close touch with developments affecting the world cotton situation.
- To collect and disseminate complete, authentic, and timely statistics on world cotton production, trade, consumption, stocks and prices.
- To suggest, as and when advisable, to the governments represented, any measures the Advisory Committee considers suitable and practicable for the furtherance of international collaboration directed towards developing and maintaining a sound world cotton economy.
- To be the forum of international discussions on matters related to cotton prices.

MEMBER GOVERNMENTS

Argentina
Australia
Belgium
Brazil
Burkina Faso
Cameroon
Chad
China (Taiwan)
Colombia
Côte d'Ivoire
Egypt
Finland
France
Germany

Greece
India
Iran
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CONTENTS

STATEMENT OF THE 65th PLENARY MEETING, ENGLISH	7
STATEMENT OF THE 65th PLENARY MEETING, RUSSIAN	11
STATEMENT OF THE 65th PLENARY MEETING, ARABIC	19
MINUTES	
Inauguration	21
Attachments	
Report of the Chairman of the Standing Committee	22
Report of the Executive Director	23
Plenary Sessions	
First Plenary Session	27
<i>Cotton and the Doha Development Round</i>	
Second Plenary Session	28
<i>Statements</i>	
Open Sessions	
First Open Session	32
<i>Cotton Production: Efficiency and the Environment</i>	
Second Open Session	34
<i>Cotton Production: Efficiency and Social Implications</i>	
Third Open Session	35
<i>Outlook for Cotton Supply and Use</i>	
Fourth Open Session	38
<i>Commercial Standardization of Instrument Testing of Cotton (CSITC)</i>	
Fifth Open Session	43
<i>Report of the Chair of the Committee on Cotton Production Research</i>	
Sixth Open Session	39
<i>The Future of the South American Textile Industry</i>	
Closing Session	41
Steering Committee	42
Attachments	
Working Paper I: Election of Standing Committee Officers	43
Working Paper II: Topic of the 2007 Technical Seminar	
Report of the Chair of the Committee on Cotton Production Research	43
Breakout Sessions	
First Breakout Session	44
<i>Summary-Statement on the Development Aspects of Cotton</i>	
Second Breakout Session	44
<i>Standardization of International Trade Rules - Progress Since Liverpool</i>	
LIST OF DOCUMENTS AND WORKING PAPERS	46
REPRESENTATION LIST	46
<i>Statements of the Meeting, which are an integral part of the full record of the meeting, are published separately.</i>	

STATEMENT OF THE 65th PLENARY MEETING

“Social and Environmental Impacts of Cotton Production and Use”

The International Cotton Advisory Committee met in Goiânia, Goiás, Brazil during September 11-15, 2006 for its 65th Plenary Meeting since 1939. Representatives from 53 governments and 10 international organizations participated in the meeting.

1. Global Cotton Demand Expanding: The Secretariat estimates that world cotton use will increase by 3% to 26 million tons during the current cotton season. World cotton consumption increased every year between 1998 and 2005, and the expansion is now the longest and largest on record.

1.1. World production is expected to remain at 25 million tons for a second year in 2006/07, and ending stocks are projected to decline by 1 million tons. The Secretariat believes that the average level of international cotton prices is likely to rise during 2006/07 as a result of the projected decline in stocks and increase in trade. The Committee instructed the Secretariat to strengthen its efforts to forecast cotton prices, and several countries suggested that the Secretariat include the effect of subsidies in their price model to improve its accuracy.

1.2. The Committee received reports from countries about developments in their cotton sectors. Some countries reported on the rapid advance of yields linked to the adoption of new technologies, including biotechnology. Developing countries reported that their industries are being severely affected by cotton prices that remain below the average of previous decades, and it was reported that government measures in some countries are contributing to distortions in world cotton production.

2. Efforts to Reduce Negative Impacts Must Continue: Member Governments reaffirmed that production and export subsidies affect cotton prices and trade, and lead to negative impacts on cotton farmers, especially in the developing and least developed countries and, therefore, it was suggested that these impacts continue to be evaluated and reported by the Secretariat. The Committee reaffirmed the critical importance cotton plays in the economies of developing countries.

2.1. The Committee acknowledged the Sectoral Initiative on Cotton from the four African countries of Benin, Burkina Faso, Chad, and Mali and the importance of the Initiative in contributing to solutions to problems involving cotton production. The Committee strongly supported the trade and development aspects of the WTO Initiative on Cotton and notes that substantive progress on both is imperative. The Committee recalled that members of the WTO agreed to treat cotton ambitiously, expeditiously, and specifically.

2.2. The Committee called on the WTO and its members to urgently resume the “suspended” Doha round of multilateral trade negotiations. The Committee agreed that a liberalized world trade system for cotton can best be reached through WTO framework.

2.3. The Committee welcomed the work already done by WTO members to provide assistance to the cotton sector under the development aspects mandate, and encouraged the WTO, with support from the ICAC, to continue to promote this aspect. It was noted that the ICAC is assisting African countries with the adoption of instrument testing systems. The Committee agreed that for full benefits to be obtained for cotton in the WTO negotiations there has to be coherence between trade and development aspects. The Committee instructed the Secretariat to work with the WTO to conduct annual workshops on cotton trade and development aspects.

3. Better Practices in Cotton Cultivation Encouraged: The Committee was informed that cotton, a driving force for development, leads to increased production of associated crops and livestock and contributes to the development of professional associations in developing countries. Insecticide use in cotton production is being gradually reduced. A careful evaluation of cotton farming practices in Africa and other developing countries indicates that there are negative impacts associated with improper use of pesticide and fertilizer, as well as positive results when properly applied. More studies are required.

3.1. The Committee noted that in spite of significant advances that have taken place, additional studies are required in the agricultural production systems, which include indebtedness linked to input finance; hardship of labor, especially for women and children; inappropriate use of chemicals and other inputs which may result in exposure of farm workers and have environmental consequences.

3.2. The Committee discussed efforts to encourage the adoption of Integrated Pest Management (IPM) and other Better Management Practices (BMPs) that enable producers to improve resource use, enhance environmental outcomes reduce waste, assure market access and strengthen relations with local stakeholders. In addition, the Committee heard reports about the Better Cotton Initiative (BCI). The BCI aims to promote measurable improvements in the key environmental and social impacts of cotton cultivation worldwide. BCI is a collaborative, multi-stakeholder effort initiated by the World Wildlife Fund (WWF) and the International Finance Corporation (IFC).

3.3. The Committee directed the Secretariat to form an Expert Panel on the Social, Environmental and Economic Performance of the world cotton industry. The Expert Panel will provide objective, science-based information to the Committee on the negative and positive aspects of global cotton production and will make recommendations for further action as appropriate. As one component of its mandate, the Expert Panel will gather information from around the world on costs of agricultural labor and the factors that affect those costs.

4. **Standardization of Instrument Testing:** Instrument testing of cotton is gradually replacing hand classing, and the world cotton industry is in the process of adopting standard systems and procedures for the operation of cotton testing centers. The Committee is supporting this change through the work of its Task Force on Commercial Standardization of Instrument Testing of Cotton (CSITC). The CSITC reported that it will begin conducting Round Trials among testing centers on a voluntary basis during 2006 so as to provide information about the accuracy and precision of test center performance to test center operators.

4.1. The objective of the CSITC is to enable all cotton test centers to meet international standards of accuracy so as to facilitate global uniformity in test center results and thereby increase transparency and efficiency in the cotton market. The Committee continued to take note of the concerns of developing countries about the cost of purchase and operation of instrument testing systems, and instructed the CSITC to consider ways that costs could be reduced.

4.2. The Secretariat and members of the CSITC are also aware that tests for additional fiber characteristics such as neps, short fiber content and trash need to be developed and incorporated into standardized instrument testing systems. The Committee instructed the CSITC to be aware that implementation of instrument testing systems must be gradual and will be adopted on a country-by-country basis as and when appropriate.

4.3. The Committee noted that during the past year the CSITC developed a project proposal to assist African countries in their efforts to implement instrument testing systems. The Committee expressed its appreciation to the Common Fund for Commodities (CFC) for approving this project that will assist African countries to participate in the Commercial Standardization of Instrument Testing of Cotton. The ICAC notes that the CFC is contributing a very significant amount to the total project of US\$2 million. The Committee also noted that US\$3 million are expected to be provided through co-financing from the European Commission (EC) under its All-ACP Support Programme on Agricultural Commodities. It is hoped that EC co-financing can be formally confirmed at the soonest opportunity.

5. The Committee on Cotton Production Research organized a **Technical Seminar on the role of biotechnology and crop management in improving sustainability of cotton production**. The technical seminar included presentations on the benefits of both cotton bio-technology and integrated pest management. Both approaches may contribute to improved quality of life of cotton producers and reduce use of pesticides. The Committee noted that using biotech cotton can be a valuable component in an integrated approach to improve the long-term sustainability of cotton production.

5.1. The commercialization of biotech products requires a long process of regulatory approval. Biotech cotton has significantly reduced the use of pesticides, particularly insecticides. Proper crop management and timely field operations do enhance the benefits of new technologies. Crop rotations, pest resistant varieties, growth monitoring and plant mapping and rationalization of field activities have been proven to result in better cotton production methods. The Committee on Cotton Production Research recognized the role of the International Cotton Genome Initiative (ICGI) in developing technologies that will allow marker-assisted breeding in years to come. Proposals were made to develop performance indicators against which progress could be measured across countries in a uniform way for improving cotton as an environmentally, economically and socially sustainable crop.

5.2. The Committee on Cotton Production Research decided to hold the 2007 technical Seminar on the topic of "The Vision for 2025".

5.3. The Committee received a report on preparations for the World Cotton Research Conference-4 (WCRC-4) to be held in Lubbock, Texas, USA from September 10-14, 2007. Participation in the WCRC-4 is expected to exceed 600 scientists.

6. The Committee received a report from its **Private Sector Advisory Panel**. The PSAP asked the executive director to study the risks and benefits of creating a more formal mechanism for private sector participation in the ICAC, without impinging upon the essential nature of the ICAC as an intergovernmental body, and to report his findings to the PSAP and the Standing Committee for future consideration. The PSAP noted that it is necessary that the private sector actively support the work of the ICAC. The PSAP recommended that non-member countries join the Committee. The PSAP discussed the issue of excess moisture in baled cotton. The Panel suggested that governments should prohibit destructive systems that add liquid moisture to bales solely for the purpose of increasing weight. The PSAP strongly believes that the work of the International Forum for Cotton Promotion (IFCP) is necessary and important and that the ICAC should continue to support the IFCP through the business plan. There was a suggestion that the IFCP not limit its efforts to national, fully developed marketing plans and consider small-scale, regional or low-budget activities that may be implemented at a sub-national scale. Members of the PSAP noted that there is an increase

in the number of inaccurate, negative statements in the press regarding cotton production, including negative statements from advocates of organic cotton who distort the effects of conventional cotton production. The IFCP was asked to consider ways that inaccurate statements could be countered.

7. **The International Forum for Cotton Promotion (IFCP)** conducted a session on demand enhancement during the Production Conference that was held adjacent to the Plenary Meeting. Participants in the session agreed that there are many inexpensive techniques that can be employed to raise the profile of cotton and cotton products, including “Cotton Days”, cause-marketing to raise money for charities, fashion shows, posters, and donated t-shirts for marathons. The Committee agrees that efforts to build demand contribute to the health of the cotton sector.

8. The Committee welcomed the statement made by the **European Union** and its member states that the European Commission continues to work toward becoming a member of the ICAC. The Committee welcomed **Kazakhstan** and **Zambia** as the newest members of the Committee. Member governments noted that the ICAC provides public infrastructure in support of the cotton industry that cannot be performed in the private sector, and that the ICAC is an instrument of cooperation and communication to the benefit of all participants in the cotton economy.

9. The ICAC expressed its appreciation to the **Common Fund for Commodities (CFC)** for supporting commodity development and acknowledged the benefits to the cotton industry of projects financed by the CFC. Since the Fund became fully operational in 1991, a total of 18 cotton projects have been supported. The CFC has provided US\$5.7 million in loan financing and US\$22.7 million in grant financing for cotton projects. The Secretariat and the Standing Committee were instructed to explore multi-country and regional priorities for projects to be funded by the CFC in the future and to present them in due course to the CFC for inclusion in the Funds third Five Year Action Plan (2008-2012).

10. The Committee thanked the Government and cotton industry of **Brazil** for their hospitality and generosity in serving as host of the 65th Plenary Meeting. The efforts of the Secretariat and Organizing Committee in preparing for the meeting were much appreciated. The Committee accepted an invitation from the Government of Turkey to host the 66th Plenary Meeting in the city of Izmir during October 22-26, 2007. An invitation to host the 67th Plenary Meeting in Burkina Faso in 2008 has also been accepted. The Committee is gratified to note that invitations to host future plenary meetings have also been received from Pakistan, South Africa, Tanzania and Kazakhstan.

MEMBER GOVERNMENTS

Argentina, Australia, Belgium, Brazil, Burkina Faso, Cameroon, Chad, China (Taiwan), Colombia, Côte d'Ivoire, Egypt, Finland, France, Germany, Greece, India, Iran, Israel, Italy, Kazakhstan, Republic of Korea, Mali, Netherlands, Nigeria, Pakistan, Paraguay, Poland, Russia, South Africa, Spain, Sudan, Switzerland, Syria, Tanzania, Togo, Turkey, Uganda, United Kingdom, United States of America, Uzbekistan, Zambia, Zimbabwe.

ANNEX 1 SUPPLY AND DISTRIBUTION OF COTTON September 15, 2006

Years Beginning August 1

	2002	2003	2004	2005 Est.	2006 Proj.	2007 Proj.
Million Metric Tons						
BEGINNING STOCKS						
WORLD TOTAL	10.976	9.354	8.713	11.037	10.69	9.85
CHINA (MAINLAND)	3.094	2.385	2.166	1.552	1.61	1.62
USA	1.622	1.172	0.751	1.196	1.30	0.96
NET EXPORTERS	3.822	3.612	5.142	6.332	6.03	5.34
NET IMPORTERS 1/	7.154	5.741	3.570	4.705	4.65	4.51
PRODUCTION						
WORLD TOTAL	19.301	20.708	26.289	24.738	24.89	26.47
CHINA (MAINLAND)	4.916	4.871	6.324	5.770	6.06	6.46
USA	3.747	3.975	5.062	5.201	4.43	4.95
INDIA	2.312	3.043	4.131	4.148	4.59	4.73
PAKISTAN	1.736	1.708	2.482	2.089	2.23	2.34
UZBEKISTAN	1.022	0.893	1.134	1.210	1.14	1.10
BRAZIL	0.848	1.309	1.299	1.028	1.16	1.29
OTHERS	4.721	4.909	5.856	5.292	5.29	5.61
CONSUMPTION						
WORLD TOTAL	20.872	21.279	23.407	24.873	25.73	26.25
CHINA (MAINLAND)	6.144	6.981	8.326	9.900	10.49	10.91
INDIA	2.910	2.959	3.232	3.426	3.63	3.78
PAKISTAN	2.042	2.100	2.234	2.390	2.53	2.64
EU, C. EUR. & TURKEY	2.384	2.230	2.300	2.145	2.08	2.01
EAST ASIA & AUSTRALIA	2.075	1.879	1.990	1.903	1.91	1.90
USA	1.583	1.364	1.457	1.285	1.20	1.11
BRAZIL	0.800	0.875	0.900	0.870	0.90	0.90
CIS	0.689	0.671	0.623	0.619	0.63	0.63
OTHERS	2.244	2.219	2.346	2.335	2.36	2.37
EXPORTS						
WORLD TOTAL	6.647	7.235	7.779	9.753	9.70	9.67
USA	2.591	2.995	3.143	3.821	3.57	3.75
CFA ZONE	0.815	1.059	0.936	1.031	1.03	0.95
UZBEKISTAN	0.783	0.659	0.850	1.020	1.02	0.94
AUSTRALIA	0.575	0.470	0.435	0.650	0.55	0.49
BRAZIL	0.107	0.210	0.339	0.429	0.46	0.44
GREECE	0.280	0.247	0.321	0.355	0.35	0.29
CHINA (MAINLAND)	0.164	0.038	0.007	0.008	0.01	0.01
IMPORTS						
WORLD TOTAL	6.586	7.265	7.325	9.547	9.70	9.67
CHINA (MAINLAND)	0.682	1.929	1.394	4.200	4.45	4.46
EAST ASIA & AUSTRALIA	2.072	1.700	2.072	1.757	1.84	1.87
EU, C. EUR. & TURKEY	1.402	1.232	1.434	1.268	1.06	1.04
CIS	0.348	0.313	0.347	0.339	0.31	0.32
SOUTH AMERICA	0.333	0.303	0.215	0.255	0.31	0.24
TRADE IMBALANCE 2/	-0.062	0.029	-0.454	-0.205	0.00	0.00
STOCKS ADJUSTMENT 3/	0.010	-0.100	-0.103	-0.008	0.00	0.00
ENDING STOCKS						
WORLD TOTAL	9.354	8.713	11.037	10.688	9.85	10.08
CHINA (MAINLAND)	2.385	2.166	1.552	1.614	1.62	1.62
USA	1.172	0.751	1.196	1.295	0.96	1.06
NET EXPORTERS	3.612	5.142	6.332	6.033	5.34	5.55
NET IMPORTERS 1/	5.741	3.570	4.705	4.655	4.51	4.53
ENDING STOCKS/USE 4/	0.51	0.59	0.72	0.89	0.83	0.84
COTLOOK A INDEX 5/	55.40	68.30	52.20	56.15		

1/ Includes Argentina, China (Mainland), Colombia, Mexico, Pakistan, Turkey and traditional importers.

2/ The inclusion of linters and waste, changes in weight during transit, differences in reporting periods and measurement error account for differences between world imports and exports.

3/ Difference between calculated stocks and actual; amounts for forward seasons are anticipated.

4/ World-less-China (Mainland) ending stocks minus China net exports, quantity divided by world-less-China consumption.

5/ U.S. cents per pound.

Заявление 65-го пленарного заседания

«Социально-экологические последствия производства и использования хлопка»

В период 11-15 сентября 2006 г. в г.Гояния, шт.Гояс, Бразилия, состоялось 65-е пленарное заседание учрежденного в 1939 году Международного консультативного комитета по хлопку. В заседании приняли участие представители 53 правительств и 10 международных организаций.

1. Расширение глобального спроса на хлопок. По оценкам Секретариата, в нынешнем хлопковом сезоне мировое использование хлопка увеличится на 3% до 26 млн. тонн. В период с 1998 по 2005 гг. мировое хлопкопотребление возросло каждый год, причем в настоящее время увеличение является самым длительным и самым крупным за все времена.

1.1 В 2006-07 г. ожидается, что мировое производство уже второй сезон подряд останется на уровне 25 млн. тонн, а конечные запасы могут сократиться на 1 млн. тонн. Секретариат считает, что в 2006-07 г. средний уровень международных цен на хлопок, вероятно, поднимется в результате прогнозируемых сужения запасов и расширения торговли. Комитет поручил Секретариату усилить свою работу по прогнозированию цен на хлопок, причем несколько стран предложили, чтобы Секретариат включил влияние субсидий в свою ценовую модель для повышения ее точности.

1.2 Комитет заслушал доклады стран о событиях в их хлопковом хозяйстве. Некоторые страны доложили о повышении урожайности благодаря внедрению новых технологий, в т.ч. биотехнологии. Развивающиеся страны сообщили, что на их отрасли очень влияют цены на хлопок, которые остаются ниже средних цен предыдущих десятилетий. Сообщалось, что правительственные меры в некоторых странах вызывают искажения мирового хлопкопроизводства.

2. Меры по снижению отрицательных последствий должны продолжаться. Правительства-члены еще раз указали на то, что субсидии, выделяемые на производство и экспорт, влияют на хлопковые цены и торговлю и отрицательно сказываются на доходах хлопкоробов, особенно в развивающихся и малоразвитых странах. Поэтому было предложено, чтобы Секретариат по-прежнему оценивал такие последствия и сообщал о них. Комитет еще раз подчеркнул чрезвычайную важность хлопка в экономиках развивающихся стран.

2.1 Комитет отметил Отраслевую инициативу по хлопку, поступившую от четырех африканских стран - Бенина, Буркина-Фасо, Чада и Мали, – и важность данной инициативы при решении проблем, связанных с хлопкопроизводством. Комитет поддержал аспекты торговли и развития Инициативы ВТО по хлопку и отметил необходимость достижения значительного прогресса в этом направлении. Комитет заявил, что члены ВТО согласились рассматривать вопросы относительно хлопка с пониманием, оперативно и конкретно.

2.2 Комитет призвал ВТО и ее членов немедленно возобновить «прерванный» раунд многосторонних переговоров в Дохе по вопросам торговли. Комитет согласился с тем, что либерализованной мировой системы торговли хлопком можно наилучшим образом добиться в рамках ВТО.

2.3 Комитет приветствовал работу, проделанную членами ВТО в деле предоставления помощи хлопковому сектору в соответствии с мандатом по вопросу развития, и призвал ВТО по-прежнему двигаться в этом направлении при поддержке МККХ. Отмечалось, что МККХ помогает африканским странам внедрять системы механического испытания. Комитет согласился с тем, что для достижения полных преимуществ хлопка при переговорах в рамках ВТО необходимо добиться согласованности аспектов торговли и развития. Комитет поручил Секретариату работать вместе с ВТО над вопросом проведения ежегодных тематических семинаров, касающихся проблем торговли и развития хлопка.

3. Внедрение передовых методов выращивания хлопчатника. Комитету сообщили, что хлопок, будучи движущей силой развития, способствует росту производства смежных культур и домашнего скота, а также содействует деятельности профессиональных ассоциаций в развивающихся странах. Постепенно сокращается использование инсектицидов в хлопкопроизводстве. Тщательная экспертиза методов возделывания хлопчатника в Африке и других развивающихся странах указывает на наличие отрицательных последствий, связанных с неправильным использованием пестицидов и удобрений, а также положительных последствий, когда их применяют надлежащим образом. В этой области необходимы дальнейшие исследования.

3.1 Комитет отметил, что несмотря на достигнутый существенный прогресс, в системах сельскохозяйственного производства необходимы дополнительные исследования, которые включают задолженность, связанную с финансированием сельхозтехники; тяжелый труд, особенно женщин и детей; неправильное использование химикатов и прочих ресурсов, что может привести к отравлению фермерских рабочих и отрицательным экологическим последствиям.

3.2 Комитет обсудил мероприятия по стимулированию внедрения комплексных методов борьбы с вредителями и других передовых способов возделывания хлопчатника, которые позволяют производителям улучшить использование ресурсов, повысить качество решений экологических проблем, сократить угары, добиться доступа к рынкам и укрепить отношения с местными заинтересованными лицами. Кроме того, Комитет заслушал доклады о Передовой хлопковой инициативе, нацеленной на достижение усовершенствований в ключевых экологических и социальных аспектах выращивания хлопчатника во всем мире. Эта инициатива является совместным мероприятием многих заинтересованных лиц, разработанным Мировым фондом дикой природы и Международной финансовой корпорацией.

3.3 Комитет поручил Секретариату сформировать группу экспертов по социально-экологическим и экономическим аспектам деятельности в мировой хлопковой промышленности. Эта группа экспертов будет предоставлять Комитету объективную и научно-обоснованную информацию об отрицательных и положительных аспектах мирового хлопкопроизводства и по мере необходимости выработать рекомендации относительно дальнейших действий. Одним из компонентов работы группы будет сбор информации по всему миру относительно затрат на оплату аграрного труда и факторов, влияющих на эти затраты.

4. Стандартизация механического испытания. Механическое испытания хлопка постепенно заменяет ручную классификацию, причем в настоящее время мировое хлопковое хозяйство находится в процессе внедрения стандартных систем и процедур работы центров испытания хлопка. Комитет поддержал эту тенденцию путем организации работы Особой рабочей группы по коммерческой стандартизации механического испытания хлопка. (КСМИХ). Эта группа сообщила, что в течение 2006 года она начнет проводить на добровольной основе экспериментальные попытки на испытательных центрах с тем, чтобы предоставить операторам центров информацию о точности и верности технических показателей работы этих центров.

4.1 Цель КСМИХ заключается в том, чтобы все центры испытания хлопка могли бы соответствовать международным стандартам точности и способствовать глобальному единообразию результатов испытательных центров, а также прозрачности и эффективности хлопкового рынка. Комитет по-прежнему отметил озабоченность развивающихся стран относительно стоимости закупки и работы систем механического испытания и поручил КСМИХ рассмотреть способы снижения стоимости.

4.2 Секретариат и члены КСМИХ осведомлены о том, что необходимо разработать и включить в стандартные системы механического испытания параметры таких дополнительных характеристик волокна, как узелки, содержание короткого волокна и сорных примесей. Комитет проинструктировал

КСМИХ о том, что внедрение систем механического испытания должно быть постепенным и применяться в различных странах по мере приемлемости.

4.3 Комитет отметил, что в течение прошлого года КСМИХ разработала предложения по проекту помощи африканским странам в их попытках внедрить системы механического испытания. Комитет выразил свою благодарность Общему фонду для сырьевых товаров (ОФСТ) за утверждение указанного проекта, который поможет африканским странам участвовать в коммерческой стандартизации механического испытания хлопка. МККХ отметил, что ОФСТ выделяет значительные суммы денег в размере 2 млн. долларов США на реализацию данного проекта. Комитет также считает, что ожидается выделение 3 млн. долларов США путем софинансирования со стороны Европейской Комиссии в соответствии с Программой поддержки сельскохозяйственных товаров в странах Африки, Карибского и Тихоокеанского бассейнов. Была выражена надежда, что такое софинансирование может быть формально подтверждено в ближайшее время.

5. Комитет по научным исследованиям в области хлопкопроизводства провел **технический семинар о роли биотехнологии и выращивания сельскохозяйственных культур для улучшения стабильности хлопкопроизводства**. Во время технического семинара были заслушаны доклады о преимуществах как биотехнологии хлопка, так и комплексных методов борьбы с вредителями. Оба подхода могут способствовать повышению качества жизни хлопкопроизводителей и сокращению использования пестицидов. Комитет отметил, что использование биотехнологичного хлопка может стать ценным компонентом комплексного метода улучшения долгосрочной стабилизации хлопкопроизводства.

5.1 Коммерциализация биотехнологичных продуктов связана с длительным процессом утверждения регулируемыми органами. Биотехнологичный хлопок способствует существенному уменьшению использования пестицидов, особенно инсектицидов. Надлежащее выращивание культур и своевременные полевые работы расширяют масштабы преимуществ новых технологий. Получению более совершенных методов хлопкопроизводства способствовали севообороты, создание стойких к вредителям сортов, контроль роста и картирование растений, а также рационализация полевых работ. Комитет по научным исследованиям в области хлопкопроизводства отметил роль Международной инициативы по изучению геномы хлопка в развитии технологий, которые в будущем позволят проводить селекционирование с помощью рыночных показателей. Были выдвинуты предложения по разработке техникоэкономических показателей, с помощью которых можно будет единообразно измерять прогресс в различных странах для улучшения характеристик хлопка в качестве экологически, экономически и социально устойчивой культуры.

5.2 Комитет по научным исследованиям в области хлопкопроизводства решил провести в 2007 г. технический семинар по теме «Перспективы на 2025 г.».

5.3 Комитет заслушал доклад о подготовке к Мировой конференции-4 по научным исследованиям в области хлопка, которая состоится в г.Лаббоке, шт.Техас, США, в период 10-14 сентября 2007 г. Предполагается, что в этой конференции примут участие свыше 600 ученых.

6. Комитет заслушал доклад **Консультативной группы частного сектора (КГЧС)**, которая обратилась с просьбой к исполнительному директору изучать недостатки и преимущества создания более формального механизма участия частного сектора в работе МККХ, не посягая на существенную природу МККХ как межгосударственного органа, а также сообщать результаты своих исследований членам КГЧС и Постоянного Комитета для дальнейшего рассмотрения. КГЧС отметила необходимость активной поддержки работы МККХ со стороны частного сектора. КГЧС рекомендовала странам-нечленам вступить в ряды Комитета. КГЧС обсудила вопрос избыточности влаги в хлопковых кипах и предложила, чтобы правительства запретили использование пагубных систем добавления жидкостной влаги в кипы лишь с целью увеличения веса. КГЧС уверена, что работа Международного форума рекламирования хлопка (МФРХ) является необходимой и важной и что МККХ должен по-прежнему

поддерживать МФРХ при составлении бизнес-плана. Было выдвинуто предложение о том, чтобы МФРХ не ограничивал свою деятельность национальными и полностью разработанными планами маркетинга, а рассматривал мелкомасштабную, региональную или низкобюджетную деятельность, которую можно применять в субнациональном масштабе. Члены КГЧС отметили увеличение количества неточных и отрицательных суждений в прессе относительно хлопкопроизводства, в т.ч. отрицательные высказывания приверженцев органического хлопка, которые искажают последствия обычного хлопкопроизводства. МФРХ попросили изыскать пути противостояния неточным заявлениям.

7. **Международной форум рекламирования хлопка** провел сессию о повышении спроса на конференции о производстве хлопка, которая состоялась параллельно с пленарным заседанием. Участники сессии пришли к согласию о том, что существуют многие недорогие способы повышения имиджа хлопка и хлопковой продукции, в т.ч. программа «Дни хлопка», целевой маркетинг для сбора денежных средств в целях благотворительности, показы моды одежды, плакаты и подаренные футболки для марафонов. Комитет согласился с тем, что усилия по созданию спроса способствуют силе и мощи хлопкового сектора.

8. Комитет приветствовал заявление **Европейского Союза** и его стран-членов о том, что Европейская Комиссия по-прежнему работает в направлении вступления в МККХ. Комитет приветствовал **Казахстан и Замбию** в качестве самых новых членов. Правительства-члены отметили, что МККХ обеспечивает государственную инфраструктуру в поддержку хлопкового хозяйства, которую невозможно осуществить в частном секторе, и что МККХ является механизмом сотрудничества и коммуникации на благо всех участников хлопкового хозяйства.

9. МККХ выразил свою благодарность **Общему фонду для сырьевых товаров (ОФСТ)** за поддержку в деле развития сырьевых товаров и сообщил о преимуществах, предоставляемых хлопковой промышленности на основании проектов, финансируемых Фондом. С начала полномасштабной работы Фонда в 1991 г. были в совокупности утверждены 18 хлопковых проектов на сумму 5,7 млн. долларов США в ссудах и 22,7 долларов США в грантах. Секретариату и Постоянному Комитету поручили расследовать межстрановые и региональные приоритеты для проектов, подлежащих финансированию со стороны ОФСТ в будущем, и своевременно представить их ОФСТ для включения в его третий 5-летний план действий (2008-2012 гг.).

10. Комитет поблагодарил правительство и хлопковое хозяйство **Бразилии** за гостеприимство и щедрость при проведении 65-го пленарного заседания. Особая благодарность выражается Секретариату и Оргкомитету за организацию данного заседания. Были приняты приглашения правительства **Турции** по организации 66-го пленарного заседания в г.Измире в период 20-26 октября 2007 г. Было также принято приглашение о проведении в 2008 г. 67-го пленарного заседания в **Буркина-Фасо**. Комитет с благодарностью отмечает, что помимо этого были получены приглашения по организации и проведению будущих пленарных заседаний от Пакистана, Южной Африки, Танзании и Казахстана.

Страны-члены Комитета

Австралия, Аргентина, Бельгия, Бразилия, Буркина-Фасо, Великобритания, Германия, Греция, Замбия, Египет, Зимбабве, Израиль, Индия, Иран, Испания, Италия, Казахстан, Камерун, Китай (Тайвань), Колумбия, Кот-д'Ивуар, Мали, Нигерия, Нидерланды, Пакистан, Парагвай, Польша, Республика Корея, Россия, Сирия, США, Судан, Танзания, Того, Турция, Уганда, Узбекистан, Франция, Финляндия, Чад, Швейцария, ЮАР.

للقطاع الخاص توفيره، وأن اللجنة الإستشارية الدولية للقطن تعتبر أداة للتعاون والإتصال لصالح كافة المشاركين في إقتصاد القطن.

9. عبرت اللجنة الاستشارية الدولية للقطن عن إمتنانها للصندوق المشترك للسلع على دعم تنمية السلع، ونوهت بفوائد المشروعات التي يمولها الصندوق المشترك للسلع لصناعة القطن. ومنذ أن بدأ الصندوق عمله بالكامل في عام 1991 بلغ إجمالي عدد المشروعات التي مولها 18 مشروعا. وقدم الصندوق 5.7 ملايين دولار على شكل قروض، و22.7 مليون دولار على شكل منح لمشروعات القطن. وصدرت التعليمات للأمانة العامة واللجنة الدائمة لبحث أولويات المشروعات لدول متعددة أو على المستوى الإقليمي لكي يمولها الصندوق في المستقبل، وتقديمها في أسرع وقت ممكن إلى الصندوق لإدراجها في خطة عمل الصندوق الخمسية الثالثة (2008-2012).

10. شكرت اللجنة حكومة وصناعة القطن في البرازيل على حسن الضيافة والكرم باستضافة الإجتماع العمومي الخامس والستين. كما عبرت عن إمتنانها لجهود الأمانة العامة واللجنة المنظمة في الإعداد للإجتماع. وقبلت اللجنة الدعوة المقدمة من حكومة تركيا لإستضافة الإجتماع العمومي السادس والستين في مدينة أزميز خلال الفترة من 22 إلى 26 أكتوبر 2007. كما قبلت الدعوة لاستضافة الإجتماع السابع والستين في بوركينا فاسو في عام 2008. وتشعر اللجنة بالإمتنان للدعوات التي قدمت لإستضافة الإجتماعات العمومية من باكستان وجنوب إفريقيا وتنزانيا وكازاخستان.

الحكومات الأعضاء

الأرجنتين وأستراليا وبلجيكا والبرازيل وبوركينا فاسو والكاميرون وتشاد والصين (تايبوان) وكولومبيا وساحل العاج ومصر وفنلندة وفرنسا وألمانيا واليونان والهند وإيران وإسرائيل وإيطاليا وكازاخستان وجمهورية كوريا ومالي وهولندا ونيجيريا وباكستان وباراجواي وبولندا وروسيا وجنوب إفريقيا وأسبانيا والسودان وسويسرا وسوريا وتنزانيا وتوجو وتركيا وأوغندا والمملكة المتحدة والولايات المتحدة الأمريكية وأوزبكستان وزامبيا وزيمبابوي.

عبر الدول بطريقة متناقصة من أجل تحسين القطن كمحصول مستدام من النواحي البيئية والإقتصادية والاجتماعية.

5.2: قررت لجنة بحوث القطن عقد الندوة التقنية لعام 2007 عن موضوع "رؤية لعام 2025".

5.3: تلقت اللجنة تقريراً عن الإستعدادات الجارية لعقد المؤتمر الدولي لبحوث القطن-4، والمقرر إنعقاده في لوبوك بولاية تكساس بالولايات المتحدة الأمريكية من 10 إلى 14 سبتمبر 2007. ومن المتوقع أن يزيد عدد العلماء المشاركين في المؤتمر عن 600 عالم.

6. تلقت اللجنة تقريراً من اللجنة الإستشارية للقطاع الخاص. وقد طلبت اللجنة الإستشارية للقطاع الخاص من المدير التنفيذي دراسة مخاطر وفوائد إنشاء آلية ذات صبغة رسمية لمشاركة القطاع الخاص في اللجنة الإستشارية الدولية للقطن، دون النيل من الطبيعة الضرورية للجنة الإستشارية الدولية للقطن باعتبارها منظمة عاملة بين الحكومات، وإبلاغ نتائجها إلى اللجنة الإستشارية للقطاع الخاص واللجنة الدائمة لبحثها في المستقبل. ولاحظت اللجنة الإستشارية للقطاع الخاص أن من الضروري أن يؤيد القطاع الخاص بشكل حثيث عمل اللجنة الإستشارية الدولية للقطن. وقد أوصت اللجنة الإستشارية للقطاع الخاص الدول غير الأعضاء على الإنضمام إلى اللجنة. وقد ناقشت اللجنة الإستشارية للقطاع الخاص موضوع زيادة نسبة الرطوبة في قطن البالات. واقترحت اللجنة أن تمنع الحكومات النظم المدمرة التي تضيف الرطوبة السائلة إلى البالات بهدف زيادة وزنها. وتؤمن اللجنة الإستشارية للقطاع الخاص إيماناً قوياً بأن عمل المنتدى الدولي للترويج للقطن ضروري وهام، وأن اللجنة الإستشارية الدولية للقطن ينبغي أن تستمر في دعم المنتدى الدولي للترويج للقطن من خلال خطة عمل تجارية. وكان هناك إقتراح بأن لا تقصر اللجنة الإستشارية للقطاع الخاص جهودها على خطط التسويق الوطنية التي إكتملت، وأن تدرس أنشطة على نطاق صغير، إقليمية أو ذات ميزانية محدودة يمكن تنفيذها على المستوى دون الوطني.

ولاحظ أعضاء اللجنة الإستشارية للقطاع الخاص أن هناك زيادة في عدد البيانات السلبية غير الصحيحة في الصحافي عن إنتاج القطن، بما في ذلك بيانات سلبية من أنصار القطن العضوي الذين يشوهون آثار إنتاج القطن التقليدي. وطلب من المنتدى الدولي لإنتاج القطن بحث سبل مواجهة البيانات غير الصحيحة.

7. عقد المنتدى الدولي لإنتاج القطن جلسة عن زيادة الطلب على القطن خلال مؤتمر الإنتاج الذي عقد على هامش الاجتماع العمومي. ووافق المشاركون في الجلسة على أن هناك وسائل غير مكلفة يمكن أن تستخدم لدعم مركز القطن ومنتجات القطن، بما في ذلك "أعياد القطن"، وعمليات التسويق لجمع التبرعات للأعمال الخيرية، وعروض الأزياء والملصقات والقمصان الرياضية "تي شيرت" في مسابقات الجري. وتوافق اللجنة على أن الجهود من أجل زيادة الطلب تساهم في تحسين صحة قطاع القطن.

8. رحبت اللجنة ببيان الإتحاد الأوروبي والدول الأعضاء به بأن المفوضية الأوروبية تواصل العمل من أجل أن تصبح عضواً في اللجنة الإستشارية الدولية للقطن. ورحبت اللجنة بكل من كازاخستان وزامبيا باعتبارهما أحدث الدول الأعضاء في عضوية اللجنة. ولاحظت الحكومات أن اللجنة الإستشارية الدولية للقطن توفر هيكل بنية تحتية أساسية عام من أجل دعم صناعة القطن لا يتسنى

التغيير من خلال مجموعة العمل الخاصة بالتعميم التجاري للاختبار الآلي للقطن. وقد ذكرت مجموعة العمل أنها ستبدأ في إجراء جولة من التجارب بين مراكز الإختبار على أساس طوعي على مدار عام 2006 من أجل توفير معلومات عن مدى جودة ودقة أداء أداء مراكز الإختبار في اختبار العاملين في تلك المراكز.

4.1: إن هدف مجموعة العمل الخاصة بالتعميم التجاري للاختبار الآلي للقطن هو تمكين كل مراكز اختبار القطن من الوفاء بالمعايير الدولية للدقة من أجل تيسير عملية التوحيد على النطاق العالمي لنتائج مراكز الإختبار، ومن ثم زيادة مستوى الشفافية والفعالية في سوق القطن. كما واصلت اللجنة التتوييه بدواعي قلق الدول النامية من تكلفة شراء وتشغيل نظم الإختبار الآلي، ووجهت مجموعة العمل الخاصة بالتعميم التجاري للاختبار الآلي للقطن لبحث السبل التي يمكن بها تخفيض التكاليف.

4.2: وتدرك الأمانة العامة وأعضاء مجموعة العمل الخاصة بالتعميم التجاري للاختبار الآلي للقطن أنه مازالت هناك حاجة لاعداد المزيد من الإختبارات الخاصة بخصائص الألياف مثل النوعية ومضمون الألياف القصيرة والنفايات، وإدراجها في نظم إختبارات آلية قياسية. ووجهت اللجنة مجموعة العمل الخاصة بالتعميم التجاري للاختبار الآلي للقطن إلى إدراك أن تنفيذ نظم الإختبار الآلي لا بد أن يكون تدريجيا، ويمكن تبنيها على أساس كل دولة على حده، وعندما يكون ذلك ملائما.

4.3: نوهت اللجنة بأنه خلال العام الماضي طورت مجموعة العمل الخاصة بالتعميم التجاري للاختبار الآلي للقطن مشروع إقتراح لمساعدة الدول الإفريقية في جهودها من أجل تنفيذ نظم إختبار قياسية. وقد عبرت اللجنة عن إمتنانها للصندوق المشتركة للسلع على موافقته على هذا المشروع لمساعدة الدول الإفريقية على المشاركة في التعميم التجاري للاختبار الآلي للقطن. وتلاحظ اللجنة الإستشارية الدولية للقطن أن الصندوق المشترك للسلع يساهم بمساهمة مالية كبيرة لإجمالي ميزانية المشروع التي تقدر بحوالي مليوني دولار. كما لاحظت اللجنة أن مبلغ إضافيا قدره 3 ملايين دولار يتوقع أن يقدم من خلال التمويل المشترك من المفوضية الأوروبية بمقتضى برنامج دعم السلع الزراعية. ويأمل أن يتأكد التمويل المشترك من جانب المفوضية الأوروبية في أقرب فرصة.

5. نظمت لجنة بحوث إنتاج القطن ندوة تقنية عن دور التكنولوجيا الحيوية وإدارة المحصول في تحسين إستدامة إنتاج القطن. وقد تضمنت الندوة التقنية محاضرات عن فوائد التكنولوجيا الحيوية والإدارة المتكاملة للأفات. وقد يساهم الأسلوبان في تحسين نوعية حياة منتجي القطن، ويخفّض إستخدام المبيدات. ولاحظت اللجنة أن إستخدام قطن التكنولوجيا الحيوية يمكن أن يكون عنصرا قيّما ضمن منحنى متكامل لإستدامة إنتاج القطن على المدى الطويل.

5.1: إن الإستهلاك التجاري لمنتجات قطن التكنولوجيا الحيوية يتطلب عملية طويلة من الموافقة التنظيمية. وقد أدى قطن التكنولوجيا الحيوية إلى تخفيض إستخدام المبيدات الزراعية بنسبة كبيرة، ولاسيما المبيدات الحشرية. ومن المؤكد أن الإدارة السليمة للمحصول والعمليات الميدانية في حينها تدعم فوائد الوسائل التكنولوجية الجديدة. وقد أثبتت عمليات الدورة الزراعية وإستخدام الأصناف المقاومة للأفات ومراقبة النمو والتخطيط النباتي وترشيد الأنشطة الميدانية أنها تؤدي إلى وسائل إنتاج أفضل للقطن. وقد نوهت لجنة بحوث إنتاج القطن بأهمية المبادرة الدولية لرسم الخريطة الجينية للقطن في تطوير أساليب تكنولوجية تسمح باستنباط وتربية أصناف جديدة على أساس علمي في السنوات القادمة. وقد أعدت مقترحات لتطوير مؤشرات أداء يمكن من خلالها قياس مدى التقدم

2.2: ناشدت اللجنة منظمة التجارة العالمية وأعضائها لاستئناف جولة الدوحة "المعلقة" من المفاوضات التجارية متعددة الأطراف. ووافقت اللجنة على أن تحرير النظام العالمي لتجارة القطن يمكن التوصل إليه من خلال إطار منظمة التجارة العالمية.

2.3: رحبت اللجنة بالعمل الذي أنجزه أعضاء منظمة التجارة العالمية بالفعل من أجل تقديم المساعدة لقطاع القطن في إطار التفويض الخاص بجوانب التنمية، وشجعت منظمة التجارة العالمية، بدعم من اللجنة الإستشارية الدولية للقطن، على مواصلة الترويج لهذا الجانب. كما تم التنويه بالمساعدة التي تقدمها اللجنة الاستشارية الدولية للقطن للدول الإفريقية على تبني نظم إختبار قياسية. واتفقت اللجنة على أنه لكي يتسنى الحصول على الفوائد الكاملة للقطن في مفاوضات منظمة التجارة العالمية لا بد من التناغم بين الجوانب التجارية والتنمية. وأصدرت اللجنة تعليماتها إلى الأمانة العامة لكي تعمل مع منظمة التجارة العالمية من أجل تنظيم ندوات سنوية عن الجوانب التجارية والتنمية للقطن.

3. تشجيع ممارسات أفضل في زراعة القطن: أحيطت اللجنة علماً بأن القطن يعتبر بمثابة القطة المحركة للتنمية، ويؤدي إلى زيادة إنتاج المحاصيل المصاحبة والثروة الحيوانية، ويساهم في تطوير الإتحادات المهنية في الدول النامية. ويجري في الوقت الحالي تخفيض استخدام المبيدات الزراعية بالتدريج في إنتاج القطن. ويبيّن التقييم الدقيق لممارسات زراعة القطن في إفريقيا والدول النامية الأخرى وجود آثار سلبية متصلة بالإستخدام غير السليم للمبيدات الزراعية والأسمدة، ونتائج إيجابية عند الإستخدام السليم. وهناك حاجة لإجراء المزيد من الدراسات.

3.1: لاحظت اللجنة أنه بالرغم من التقدم الكبير الذي حدث بالفعل مازالت هناك حاجة إلى إجراء المزيد من الدراسات على نظم الإنتاج الزراعي، بما في ذلك الديون المرتبطة بتمويل المدخلات، ومشقة العمل ولاسيما على المرأة والأطفال، والإستخدام غير الأمثل للكيميائيات والمدخلات الأخرى التي يمكن أن تؤدي إلى تعريض العمال الزراعيين، ويكون لها عواقب بيئية.

3.2: بحثت اللجنة الجهود الرامية لتبني نظام متكامل لإدارة الآفات، وممارسات إدارية أفضل، من شأنها تمكين المنتجين من تحسين إستخدام الموارد، وتحقيق نتائج بيئية أفضل، وتخفيض الفاقد، وضمان الوصول إلى الأسواق، ودعم العلاقات مع أصحاب المصلحة المحليين وبالإضافة إلى ذلك استمعت اللجنة إلى تقارير عن المبادرة الخاصة بقطن أفضل. وتهدف هذه المبادرة إلى تشجيع إدخال تحسينات يمكن قياسها في الجوانب البيئية والإجتماعية الأساسية لزراعة القطن على الصعيد العالمي. وتعتبر هذه المبادرة تضامراً للجهود بين أطراف متعددة وينظمها صندوق الحيوانات البرية العالمي وهيئة التمويل الدولية.

3.3: وجهت اللجنة الأمانة لتشكيل لجنة من الخبراء لدراسة الأداء الإقتصادي والبيئي والاقتصادي لصناعة القطن العالمية. وسوف تقدم لجنة الخبراء معلومات موضوعية، وعلى أساس علمي إلى اللجنة عن الجوانب السلبية والإيجابية لإنتاج القطن العالمي، وسوف تضع توصيات من أجل اتخاذ خطوات أخرى حسبما هو ملائم. وسوف تتولى لجنة الخبراء، ضمن صلاحياتها، جمع المعلومات من أنحاء العالم عن تكاليف العمالة الزراعية والعوامل التي تؤثر على تلك التكاليف.

4. تعميم الإختبار الآلي: يحل الإختبار الآلي للقطن بالتدريج محل التصنيف اليدوي، ودخلت صناعة القطن العالمية طور تبني نظم وإجراءات معيارية لعمليات مراكز إختبار القطن. وتؤيد اللجنة هذا

بيان الإجتماع العمومي الخامس والستين

"الآثار الإجتماعية والبيئية لإنتاج القطن واستخدامه"

اجتمعت اللجنة الإستشارية الدولية للقطن في جويانيا بولاية جوياس بالبرازيل خلال الفترة من 11 إلى 15 سبتمبر في جلساتها العمومية الخامسة والستين منذ عام 1939. وشارك في الجلسات ممثلو 53 حكومة ومنظمة دولية.

1. زيادة الطلب العالمي على القطن: تقدّر الأمانة العامة أن استخدام القطن سوف يزيد بنسبة 3 في المائة، إلى 26 مليون طن خلال موسم القطن الحالي. وقد زاد الإستهلاك العالمي من القطن سنويا في الفترة الممتدة بين عامي 1998 و2005، وأصبحت هذه الزيادة أكبر وأطول فترة زيادة من نوعها.

1.1: من المتوقع أن يثبت الإنتاج العالمي على معدل 25 مليون طن لسنة ثانية على التوالي في عام 2006/2007، وأن تنخفض كميات القطن المخزون بحوالي مليون طن. وتعتقد الأمانة العامة أن متوسط أسعار القطن سوف يرتفع خلال عام 2007/2006 بسبب الإنخفاض المتوقع في كميات المخزون والزيادة في التجارة. وقد أصدرت اللجنة تعليماتها للأمانة العامة لدعم جهودها من أجل التنبؤ بأسعار القطن، واقترحت عدة دول أن يشمل هذا النموذج أثر الدعومات على الأسعار من أجل تحسين مدى دقتها.

1.2: لقد تلقت اللجنة تقارير من الدول حول التطورات الخاصة بقطاعات القطن بها. وذكرت بعض الدول حدوث زيادة سريعة في إنتاج المحصول متصلة بتنبين أساليب تكنولوجية جديدة، من بينها التكنولوجيا الحيوية. وذكرت دول نامية أن صناعاتها تتأثر بشدة من بقاء أسعار القطن جون متوسط الأسعار في العقود السابقة. كما ذكرت أن الإجراءات الحكومية في بعض الدول تساهم في حدوث تشوهات في إنتاج القطن العالمي.

2. الجهود من أجل تخفيض التشوهات لا بد أن تستمر: أكدت حكومات الدول الأعضاء على أن إعانات الإنتاج والتصدير تشوّه إنتاج القطن وتجارته، وتؤدي إلى آثار سلبية على مزارعي القطن، وخاصة في الدول النامية والدول الأقل نموا. ومن ثمّ إقترحت مواصلة تقييم تلك الآثار وتسجيلها من جانب الأمانة العامة. وقد أكدت اللجنة من جديد على الأهمية الحيوية التي يلعبها القطن في اقتصاديات الدول النامية.

2.1: نوهت اللجنة بالمبادرة القطاعية للقطن من أربع دول افريقية وهي بينين وبوركينا فاسو وتشاد ومالي، وأهمية المبادرة في المساهمة في وضع حلول للمشاكل المتصلة بإنتاج القطن. وقد أبدت اللجنة بقوة الجوانب التجارية والتنموية لمبادرة منظمة التجارة العالمية عن القطن، وتنوّه بشأن إحراز تقدم جوهري في الجانبين أمر ضروري. وتذكر اللجنة أن أعضاء منظمة التجارة العالمية وافقوا على معاملة القطن بطريقة طموحة وسريعة ومحددة.

Inauguration

9:00 hr. Monday September 11, 2006

Mr. Paulo Cesar da Cunha Peixoto in the Chair

The CHAIR called the meeting to order. He thanked the member governments of the ICAC for choosing to organize the 65th Plenary Meeting of the Committee in Brazil and in the city of Goiânia. He said that Brazil was proud to host this meeting because of its importance to the world cotton industry. He thanked Dr. Siphwe Mkhize for his leadership of the Standing Committee. He thanked the Honorable Luis Carlos Guedes Pinto, Minister of Agriculture of Brazil and the representative of the Honorable Alcides Rodrigues Filho, Governor of Goiás for their support for the meeting. He welcomed all delegates and hoped that each has a pleasant stay in Brazil. He also acknowledged each sponsor, the Brazilian cotton industry organizations, the Government of Brazil, the Government of Goiás, and each exhibitor for their support of the meeting. The CHAIR also acknowledged all the speakers and session chairs during the week. He said that the agenda of the meeting was highly relevant and that discussions would be very productive. He said that Brazilian producers understand that cotton production must be conducted with the most modern means available with due regard for the social and environmental implications of agricultural operations. He encouraged all participants to be involved actively in the meeting, and he said that he looked forward to a successful meeting.

The CHAIR introduced the Honorable Luis Carlos Guedes Pinto, Minister of Agriculture for Brazil. Minister Carlos Guedes noted that cotton is highly important to the economies of many producing countries. He recalled that Brazil had a history as a great cotton exporter about 30 years ago. However, production had declined during the 1980s and early 1990s, but that a revolution in Brazilian agriculture was resulting in increased production again and Brazil is now one of the largest exporters. He noted that the rise in production since the mid-1990s was accompanied by a shift in the location of production to the central states such as Goiás, Mato Grosso and Bahia. The Minister credited the work of EMBRAPA, a top research agency in South America, with helping to raise yields in Brazil. EMBRAPA is an agency within the Ministry of Agriculture. He noted that agriculture accounts for 28% of Brazilian GDP and 38% of jobs, and that agricultural products account for 90% of Brazil's trade surplus. The Minister said that Brazil has the capacity to expand agricultural production to 80 million hectares without touching even one acre of sensitive soils or parts of the rain forest. The Minister said that Brazil could triple its agricultural output, and that Brazil is a leading producer of bio-diesel and other energy sources from agriculture. He said

that many stories in the world press that claim that Brazilian agriculture has negative social and environmental consequences are inaccurate. He noted that the percent of land devoted to rainforest in Brazil is growing, and that Brazil leads in rainforest protection.

The Minister said that he had met recently with other leaders from G20 Countries (major agricultural exporting countries with an interest in trade liberalization in the Doha round) and with trade negotiators from the European Union, Japan and the United States about efforts to restart the Doha round. He said that countries are imposing conditions in agriculture that are unsustainable through subsidies and barriers to entry. He said that Brazil could not accept accusations against modern agriculture by countries that cannot compete in production. The Minister concluded by saying that it was a great pleasure to welcome the ICAC to Brazil.

The CHAIR thanked Minister Carlos Guedes for his leadership and said that his remarks were much appreciated.

The CHAIR introduced former Governor of Goiás, the Honorable Marconi Perillo. It was recalled that Governor Perillo had led a delegation of Goiás cotton growers to the 62nd Plenary Meeting in Poland in 2003 to invite the ICAC to organize a meeting in Brazil. The Governor welcomed all participants to the meeting and said it was highly gratifying to have the ICAC here in Brazil. He noted that under his administration the state government had provided support to the cotton industry by developing infrastructure, supporting variety development and other research, and by encouraging improvements in quality. He highlighted the value of partnership between producer institutions and the state government.

The CHAIR thanked the Governor for his remarks and agreed that state governments, working in partnership with cotton producers, have contributed to the success of the Brazilian industry.

The CHAIR acknowledged many cotton sector organizations that had supported the plenary meeting. He noted that without their support, it would not have been possible to organize the meeting successfully.

The CHAIR introduced the representative of Governor Alcides Rodrigues Filho of Goiás. The Governor welcomed all participants to the state of Goiás and issued a special welcome to Heads of Delegations. He noted that cotton generates \$2 billion in revenue and that Goiás is the third largest cotton state in Brazil. He said that yields are rising and quality is improving, and that Brazilian producers had respect for the environment and social implications of cotton

production. He noted that cotton is benefiting the economy of the State and that state government has been instrumental in providing support to the cotton sector through research and fiscal incentives.

The CHAIR thanked the speaker for presenting the remarks of Governor Alcides Rodrigues Filho and said his remarks were most welcome.

The CHAIR introduced Dr. Siphwe Mkhize, Chairman of the Standing Committee, to give his remarks. Dr. Mkhize expressed his appreciation to the Government of Brazil, the Government of Goiás and to the Organizing Committee for their support of the ICAC. He said it was a great pleasure to be in Brazil, and he thanked all participants for their contributions. He welcomed Armelle Gruère, to her first plenary meeting as statistician for the secretariat. He complimented the secretariat for being productive and committed. He thanked other Standing Committee officers for their service during the year, including Elena Cores of Spain who served as First Vice Chair, Bilgehen Sasmaz of Turkey who served as Second Vice Chair and Jacob Pasgo of Burkina Faso who served as Chair of the Task Force on Membership. He also acknowledged Michael Keune who served as chair of the Subcommittee on Budget. Mr. Mkhize reported that the Standing Committee had been productive in the past year. He noted that the Standing Committee had monitored developments in the Doha round and had received reports from the secretariat about the size of government measures in cotton. He reported that the Standing Committee had highlighted its concerns about government measures and the concerns of African countries. He noted that the Standing Committee had formed a Task Force on Membership to communicate directly with non-member governments. He noted that the issue of the membership of China (Mainland) had been discussed at great length, and that the Standing Committee would welcome the membership of China (Mainland) and also valued the continued membership of China (Taiwan). Mr. Mkhize endorsed the nominations of Ms. Elena Cores of Spain for the position of Chair, Ms. Cecilia Marincioni of Argentina for the position of First Vice Chair and Mr. Jacob Pasgo of Burkina Faso for the position of Second Vice Chair.

The CHAIR thanked Dr. Mkhize for his remarks. *The Report of the Chairman of the Standing Committee* is attached.

He introduced Dr. Terry Townsend to give his report as executive director.

Dr. Townsend said that the ICAC is productive and that its work is vital. He noted that the most important development in world cotton supply and use during the previous season was that cotton prices had risen so little, despite the growth

in imports by China (Mainland) to a record. He said that the Secretariat model of cotton prices indicated that imports by China (Mainland) of four million tons should have pushed the season average Cotlook A Index at least as high as the long run average of more than 70 cents per pound. However, the actual average in 2005/06 was just 56 cents. He said that the Secretariat did not fully understand why prices had not moved higher and that for the time being it would not be able to issue point estimates of forecasts for cotton prices.

He commented briefly on four elements of the strategic plan used to guide the work of the Committee: government measures, sustainable production, instrument testing and membership in the ICAC. Regarding government measures, he noted that there is great disappointment that the Doha round has been suspended. He suggested that there might be increased scope for ICAC activity under the development aspects of the Doha round by sponsoring, in cooperation with the WTO, annual workshops on cotton development assistance in Africa. He welcomed the discussions on the social and environmental impacts of cotton production that would occur at this meeting. He said that there was an emerging understanding that agronomic practices that encourage sustainable production practices could enable cotton farmers to grow cotton profitably with reduced impacts on the environment while still achieving acceptable yields. He reported that the Task Force on Commercial Standardization of Instrument Testing of Cotton (CSITC) has made much progress in three years and that CSITC Round Trials would begin at the end of this year in order to encourage all testing centers to meet international standards of accuracy and precision. He said that government support for the ICAC is justified because the Committee provides public infrastructure in support of the cotton sector that cannot be provided in the private sector. The executive director thanked the Organizing Committee and the Government of Brazil for their support in hosting the 65th Plenary Meeting. He thanked members of the Private Sector Advisory Panel and the representative to UNCITRAL for their service to the industry. He acknowledged the importance of the work of the International Forum for Cotton Promotion (IFCP) and urged all participants to become familiar with its activities. He thanked the officers of the Standing Committee for their conscientious attention to the work of the Committee during the past year, and he observed that members of the Secretariat are productive and committed to the success of the cotton industry. He said it was an honor to serve as executive director.

The CHAIR thanked Dr. Townsend for his remarks. *The Report of the Executive Director* is attached.

The CHAIR noted that the proposed agenda for the plenary meeting had been approved by

the Standing Committee at a meeting in July. He asked if there were any amendments to the agenda, and seeing none, found that the Proposed Agenda was approved.

The CHAIR invited the delegate of INDIA, host of the 63rd Plenary Meeting, to give welcoming remarks on behalf of all delegates. The delegate thanked Minister Carlos Guedes Pinto, Governor Alcides Rodrigues Filho and Governor Perillo, for their support of the meeting. He thanked the Organizing Committee for all of their work and support and said that arrangements were very comfortable. He noted that the theme of the meeting is extremely relevant, and that it would be very important to learn from this plenary meeting how to improve the quality of life for people who produce cotton. He urged delegates to make decisions that are equitable and just for overall growth of the world cotton economy. On behalf of all delegations, he again thanked the Organizing Committee, the Government of Brazil and the Government of Goiás for their support.

The CHAIR thanked the delegate of INDIA for his kind remarks. His remarks are a statement of the meeting.

Seeing no additional business, the Inaugural Session was adjourned.

ATTACHMENTS

Report of the Chairman of the Standing Committee

Siphiwe F. Mkhize
South Africa

Distinguished delegates to the 65th Plenary Meeting of the International Cotton Advisory Committee, Observer and Guests:

This year our plenary theme is "The Social and Environmental Impacts of Cotton Production and Use." What a fitting theme for the ICAC meeting held in Brazil.

Well, on behalf of myself, my country South Africa, and the executive director of the International Cotton Advisory Committee, let me express appreciation to the Government of Brazil and the Government of the state of Goiás, and all who have been associated with the hosting of this August 65th Plenary Meeting of the ICAC. We really appreciate and thank every individual who has contributed to this warm hospitality.

As we know that Brazil is a giant in agriculture, it is also fitting that this state, whose economy is largely agricultural with expanding agribusiness and industrial sectors, plays host to the ICAC. This came at the right time as Brazil is also celebrating the 2006 World Food Prize Laureates,

Senor Edon Lobato, Senor Alysoon Paolinelli (both Brazilians), and Dr. A. Colin McClung (from the USA) for their pioneering work in soil science and policy implementation that opened the vast Cerrado to agricultural production. It is because of these sons of Brazil and the USA that we learned the techniques of treating acid soils, soils which have made cotton production possible in Brazil.

Mr. Chairman, before I report about the activities of the Standing Committee since the 64th Plenary Meeting which was held in Liverpool last year, let me take this opportunity to acknowledge a few individuals who have made it possible for the ICAC to arrive to this Plenary meeting. First, I would like to thank our Executive Director, Dr. Terry Townsend and all members of his staff at the Secretariat, and welcome to this Plenary Meeting for the first time our new Statistician Ms. Armelle Gruère. Mr. Chairman, let me assure you, those individuals are dedicated and committed to the ICAC, and they are diligent in solving and handling cotton issues.

Also I would like to thank all officials and officers who served the Standing Committee during the tenure of my chairmanship. I would like to particularly thank Ms Elena Cores of Spain, who served as First Vice CHAIR and Mr. Bilgehan Sasmaz of Turkey who served as Second Vice CHAIR. I want to thank Mr. Douglas Pasgo of Burkina Faso who serves as CHAIR of the Task Force on Membership. I also want to thank Ms. Andrea Nicandri of Australia and Mr. Michael Keune of Germany. Ms. Nicandri served as the CHAIR of the Subcommittee on Budget at the start of the fiscal year. Due to other assignments at the Embassy she had to relinquish those responsibilities to Mr. Keune. The work of the Subcommittee on Budget greatly facilitates the functioning of the Standing Committee, and their efforts are appreciated.

Mr. Chairman, the Standing Committee has had a productive year. The 64th Plenary Meeting charged the Standing Committee with continuing the work of the Working Group on Government Measures (WGGM) in order to contribute to discussions in the WTO. The Standing Committee also was charged with looking at membership of the ICAC, working closely with the Secretariat in management of the ICAC affairs, and the Standing Committee works with the Executive Director to see to it that the annual budget is approved, and lastly that the agenda of the 65th Plenary Meeting was approved.

Government Measures Affecting Cotton

Mr. Chairman, the Standing Committee continued to work on this issue and it had a number of meetings and invited a number of guests to talk on this issue. The Secretariat reported that eight countries offered direct income and price support in 2004/05 totaling US\$4.7 billion, and seven countries provided direct support to cotton production in 2005/06 amounting to an estimated

\$5 billion. In 2005/06, support included about \$2 billion each in China (Mainland) and the USA, about \$900 million in the European Union, \$69 million in Turkey, \$21 million in Colombia and \$17 million in Mexico. It was also noted that the USA provided about \$200 million for cotton export assistance in 2005/06, including \$11 million for Pima cotton and the balance for Upland cotton.

The WGGM invited different guests, but the one I would like to note was Ambassador Tertius Zongo of Burkina Faso who noted the following as the most important concern of cotton growers from developing countries, especially Africa.

- He emphasized that a successful Doha round has to assure that there is a marked improvement over the current trade-related programs for technical cooperation, including the amount of resources and coverage of African countries.
- He had high hopes that the modalities for agriculture and NAMA (Non-Agriculture Market Access) by the July 2006 deadline would have taken into account the development needs of Africa and LDC members; otherwise the agreement would have been counterproductive. Unfortunately all this was not met as of July 2006.
- He had envisaged that the final agreement has to improve the existing World Bank Integrated Framework designed to provide technical assistance.

It also transpired through these discussions that the USA is committed to full compliance with the WTO cotton case, and that the US government has already taken steps to modify the GSM program, which provides export credit guarantees, and to elimination of the Step 2 program. It was also noted that the US has made some progress on the US West African Cotton Improvement Program and that it had already committed \$7 million to the program and was engaged in discussions on how to scale up assistance.

Mr. Chairman, the ICAC can only encourage such cooperation and congratulate the countries involved. Lastly on the WGGM there is still a big need and task for the Secretariat to continue to monitor government measures affecting cotton and also to follow closely the process of the WTO.

Task Force on Membership

This year we also followed an instruction of the last Plenary and formed a Task Force on Membership. The main jobs of this Task Force were to raise awareness of issues concerning membership, increase membership, encourage countries to return who have unfortunately withdrawn from membership and also to try to address the issue of China (Mainland) membership. After a number of meetings a decision was taken to visit Ambassadors of different countries to talk about membership.

Mr. Chairman, the issue of membership for China (Mainland) was discussed at great length and it was decided that China (Mainland) should be encouraged to seek membership under the current Rules and Regulations of the Committee. We value the participation of China (Taiwan) and recognize the importance of China (Mainland) as the largest cotton producer and consumer.

It is still our great concern that some countries have left the Committee, but we hope that these countries will soon come back to the family of ICAC.

The Social and Environmental Impacts of Cotton production and Use

Mr. Chairman, the 65th Plenary Meeting has returned to the traditional five-day format for an ICAC meeting. This return will help us to do our business and also achieve our objective which is to devote as much time as possible to discussions of cotton matters in which all persons attending may participate. Accordingly, there will be a meeting of the Steering Committee on Thursday to approve the Statement of the Plenary Meeting and elect Standing Committee officers and discuss any other administrative matters. It is in that time that the Executive Director will submit the names of the nominated officials to serve in the coming ICAC annual year of 2007. I fully endorse the nominations of Ms Elena Cores, Attaché (Agriculture) of Spain to serve as CHAIR of the Standing Committee during the next year, Ms. Cecilia Marincioni, Trade Advisor of Argentina to serve as First Vice CHAIR and Mr. Jacob Pasgo, Minister Counselor of Burkina Faso as Second Vice CHAIR. Mr. Pasgo will also continue his excellent work as CHAIR of the Task Force on Membership.

Mr. Chairman let me also emphasize and encourage various governments to allow or give permission to their serving officials in Washington, DC to attend these plenary meetings. The participation of members of the Standing Committee in plenary meetings is important. The Standing Committee serves as a link in the chain of communication connecting the Standing Committee and Secretariat to plenary meeting delegates from governments and the private sector. The Standing Committee works with the executive director between plenary meetings to direct the work plan of the Secretariat and to implement decisions of the Advisory Committee.

Mr. Chairman, the theme of “the Social and Environmental Impacts of Cotton Production and Use,” is intended to provide an opportunity for constructive evaluation of the impacts of cotton production and on better management practices that lead to improved social and environmental conditions. It is therefore my wish, and that of the Standing Committee, that this theme will be achieved, and we can move toward better management practices that contribute positively to our sustainable livelihood.

ICAC Business matters

Mr. Chairman, one of the important functions of the standing committee is to oversee the budget of the ICAC Secretariat and to approve the scale assessments each year. The standing Committee monitors the budget of the Secretariat through the Subcommittee on Budget, and I have already mentioned its CHAIR. It is gratifying to note that revenues exceeded expenditures during the 2005-06 fiscal year and that arrears owed to the Secretariat have fallen in recent years. I would like to take this opportunity to thank governments for their efforts to remain current in the payment of assessments to the Secretariat.

The other important function of the Standing Committee is to see to the welfare of the Secretariat staff and also monitor from time to time the running of the office. Mr. Chairman, I have great pleasure to express our gratitude to the leadership of Terry Townsend our Executive Director, as well as to every member of the ICAC staff, who are committed, productive, and their performance is very competent and professional, and I would like to ask the Plenary to recognize them by a big APPLAUSE.

Lastly, a special thank you goes to all delegates and to our host the Government and People of Brazil. Let me wish you a productive Plenary Meeting.

Report of the Executive Director

Terry P. Townsend

Mr. Chairman, distinguished delegates, observers and guests, thank you for the opportunity to address this 65th Plenary Meeting of the ICAC since 1939. The world cotton industry experienced unusually strong growth in consumption and extraordinary growth in trade during the past two years. Nevertheless, financial pressures on producers remain heavy, especially for those who do not receive direct support from government measures, and many textile producers face extraordinary competitive pressures from expanding industries in other countries.

In looking back at the past season, there are three major developments specific to the cotton market that are especially intriguing. First is the ease with which the cotton industry adjusted to the tripling of imports by China (Mainland). In past years, imports of 500,000 tons by any country were considered large, and imports of one million tons were considered enormous. Yet, imports by China rose to 4 million tons last season, and the market absorbed that increase with seeming equanimity. Given the magnitude of changes in quantities traded during the past two seasons, cotton prices have been surprisingly stable, and this suggests that the world cotton

industry remains highly resilient and adaptive in the face of structural changes and logistical challenges.

Another striking development of the past season is that prices remained well below the long run average of more than 70 cents per pound, despite the enormous rise in imports by China (Mainland). Based on data from 1973, the Secretariat model of annual changes in the Cotlook A Index performed very well in most seasons. According to the model, net trade by China (Mainland) was the most important determinant of changes in annual prices, and imports by China of 4 million tons in 2005/06 should have driven the annual average Cotlook A Index at least as high as the long run average. However, despite the growth in world cotton trade, the Cotlook A Index averaged just 56 cents per pound in 2005/06, 15 to 20 cents lower than the level indicated by cotton market fundamentals.

The Secretariat's model of season averages of the Cotlook A Index has performed well since its introduction in 1988, and in most years forecast errors were caused by inaccurate estimates of cotton supply and use rather than weakness in the structure of the statistical model. The two variables used in the ICAC model, net exports by China (Mainland) as a share of non-China use, and stocks outside China as a share of non-China use, explained about 80% of the variation in annual changes in the A Index, and in most years the model error was less than 7 cents per pound. However, during the past season, the price model over-estimated by about 15 cents, suggesting that the relationship between prices and measures of supply and use has changed. This poses a strong research challenge for the Secretariat.

Logic and more than a decade of experience in using the model suggest that the variables used in the ICAC price model are still valid in identifying the direction of change and magnitude of change in prices from one year to the next, and the Secretariat is basing price forecasts for 2006/07 and 2007/08 on the changes indicated by the model. Nevertheless, additional empirical work is needed to better understand the reasons why cotton prices remain well below the long run average despite record imports by China (Mainland).

A third important characteristic of our understanding of the world cotton market during 2005/06 is the growth in mill use in China (Mainland), combined with rising uncertainty over the accuracy of estimates of cotton supply and use in China. China (Mainland) accounts for about two-fifths of world cotton mill use, and small percentage errors in estimates of the size of Chinese consumption can mean significant errors in the estimates of world trade. The Secretariat, and other organizations estimating cotton supply and use, rely on data on production, exports and imports of cotton and production of cotton yarn to try and infer the level of mill use and the balance of stocks in China (Mainland). These

statistics are crucially important in understanding the timing and size of imports, which in turn have an important impact on cotton prices. The government of China (Mainland) does not estimate cotton consumption directly, and so consumption must be inferred from yarn production, and this is a very inexact methodology. The government does not publish estimates of stocks either, and so stock estimates have to be inferred from behavior, an even-less accurate methodology. The statistical situation in China (Mainland) and other countries will receive explicit attention during the 3rd Open Session on Cotton Supply and Use. Increased transparency in the cotton sector of China (Mainland) would assist all market participants, and increased levels of participation in international meetings by cotton industry officials from China (Mainland) will be very much welcomed.

Strategic Plan

The 62nd Plenary Meeting in Poland in 2003 directed the Secretariat and the Standing Committee to develop a strategic plan to guide the work of the Committee. The Standing Committee approved a Strategic Plan earlier this year, following discussion in the Private Sector Advisory Panel. The Strategic Plan serves as an excellent planning tool for considering major challenges facing the cotton industry and how best the ICAC can assist governments in facilitating a healthy cotton economy in light of these challenges.

Sustainable production systems, demand enhancement, government measures, contract sanctity and membership in the ICAC are the major issues identified in the Strategic Plan.

Sustainable Production Systems

Sustainable production is the ability to produce cotton today without diminishing the ability of future generations to produce cotton. Sustainable production practices cannot be precisely defined because agronomic practices are highly situation specific. Nevertheless, sustainable practices are generally understood to mean agronomic systems under which farmers are able to produce cotton profitably while minimizing input use. In most cases, the knowledge necessary to implement sustainable production systems exists or can be readily developed from current technologies. The constraint to expanded implementation of sustainable production practices is a lack of knowledge by farmers, and governments can contribute through a strengthening of extension systems. Under the Strategic Plan for the ICAC, the Secretariat is charged with facilitating the development and implementation of best management practices (BMP) that result in sustainable production of cotton in producing countries.

This strategic challenge is being addressed explicitly in the theme of the 65th Plenary Meeting and during the first two Open Sessions. The purpose of each of the first two sessions is to raise awareness of the impacts of cotton production

practices on the environments and people of rural areas, and to provide fact-based measures of those impacts where possible. The word "efficiency" is included in the titles of each session to highlight that there are always tradeoffs in production decisions, and that production practices associated with low-input farming systems are not necessarily better for the environment than wisely applied conventional practices. The 5th Open Session on Thursday will contribute to this discussion with a technical seminar on the topic of Sustainability: Biotechnology and Crop Management.

Cotton is highly beneficial to the economies of the countries that grow it, and the environmental and social implications of cotton production are reasonable and manageable. However, it is now apparent that many scientists and government officials made a fundamental mistake in previous decades in focusing recommendations for cotton production practices almost exclusively on the objective of increasing yields, in many cases without regard to costs. The focus on yields has led to the development of production systems that rely on intensive applications of purchased inputs, including water and pesticides, when alternative recommendations could have achieved higher levels of sustained profitability and lower environmental and social impacts, while still achieving acceptable yields.

In many cases, the long-term consequences of high levels of pesticide use were not considered, but the lessons learned from this experience can be incorporated into new recommendations. For example, were it not for the experience with the development of resistance to pesticides, Bt cotton would probably have been introduced without a refuge requirement, and the viability of Bt technology could have been undermined by the early development of resistance. The major lesson to be learned during the 1st, 2nd and 5th open sessions of this plenary meeting is that cotton is a beneficial component of rural economies and recommendations for production practices must consider long-term consequences for the environment and impacts on people.

Demand Enhancement

Competition with chemical fiber is a continuing challenge for the cotton industry, and each plenary meeting since the mid-1980s has included discussion of how best to meet this challenge. It would seem that new approaches are necessary.

Under the strategic plan, the Secretariat is charged with encouraging increased consumption of cotton at the retail level. The Secretariat is working with the International Forum for Cotton Promotion (IFCP), and their excellent executive director Jeff Silberman, to provide information to national cotton industry organizations and governments on the structure, conduct and performance of Cotton Incorporated and other successful domestic demand enhancement orga-

nizations and encourage the adoption of similar strategies. In addition, within the strategic plan, member governments are asked to specifically endorse increased consumption of cotton as a legitimate policy goal, adopt fiber-content labeling requirements for products sold at retail, and to enact legislation supportive of efforts by the private sector to raise funds through industry organizations to finance research and promotion efforts.

Unfortunately, while there is a broad consensus that demand enhancement efforts are necessary and important, there has been little progress in actually achieving an increase in demand enhancement activities funded by national cotton sector organizations, and governments have not shown much inclination toward encouragement of such activities. Accordingly, the subject of demand enhancement is being refocused this plenary meeting for inclusion as a session in the Production Conference targeted specifically toward producers. It may be time to rethink the objective of trying to encourage the creation of national cotton organizations to fund domestic demand enhancement activities, and instead redirect the work of the IFCP toward facilitating efforts by state organizations or by individual cotton companies. The session on Demand Enhancement during the Production Conference on Wednesday will provide a forum for discussion of efforts at developing demand enhancement activities within the private sector and how best such activities might practically be organized. The 6th Open Session on Friday on the Future of the South American Textile Industry will provide an opportunity for discussion of efforts to enhance mill use of cotton.

Instrument Testing

Within an overall effort at demand enhancement, one area of significant progress within the ICAC and the cotton industry is the effort to encourage commercial standardization of instrument testing of cotton. Instrument testing is not an end in itself: it is a means to an end. The objective of instrument testing is improved efficiency in the standards used to describe cotton so as to enhance its competitiveness relative to polyester and thus raise demand for cotton.

The Task Force on Commercial Standardization of Instrument Testing of Cotton (CSITC) was created following the 62nd Plenary Meeting in 2003, in order to encourage widespread use of high-quality instrument testing systems at the producer level within a standardized international testing system. Under the strategic plan, the ICAC will encourage worldwide adoption of a standardized instrument testing system for cotton by facilitating the work of the CSITC and by disseminating information about instrument testing systems. The CSITC met five times during 2004, 2005 and early 2006, and agreed to a system of international CSITC Round Trials to evaluate the performance of cotton testing

centers within a standardized instrument testing system. Two Pilot CSITC Round Trials were conducted in 2005 and 2006 to test procedures for the conduct of the Round Trials and the evaluation of test centers, and actual quarterly CSITC Round Trials will begin in the last quarter of 2006. This is a major accomplishment for the world cotton industry and demonstrates the value of the ICAC as a forum for discussion in order to facilitate cooperation. It is with great appreciation that I thank Andrew Macdonald and all members of the Task Force on CSITC and other participants in CSITC activities for their work during the past three years.

With support from the Common Fund for Commodities (CFC), and with co-financing by the European Commission, the ICAC is sponsoring a project to assist developing countries to participate in the international system of standardized instrument testing. The world cotton industry receives substantial support from the CFC and its Managing Director, Ambassador Ali S. Mchumo. The support given to the cotton sector by the CFC is contributing materially to the health of the world cotton industry. The support of the EU for the instrument testing initiative of the ICAC is also much appreciated.

A full report on the work of the Task Force on CSITC and a panel discussion about the costs and difficulties of implementation will take place during the 4th Open Session on Tuesday.

Distortions Caused by Government Measures

There is broad recognition that distortions to production and trade caused by government measures in agriculture reduce income and lower wealth in the aggregate. There is broad agreement that the venue for negotiation of reductions in agricultural subsidies is the World Trade Organization (WTO). The role of the ICAC in the WTO process is to inform governments about the nature and scope of distortions in cotton caused by government measures, and to raise the profile of cotton and emphasize the need to reduce government measures that distort production and trade. The First Plenary Session is devoted to the topic of Government Measures, and the time allotted to this topic has intentionally been increased in the agenda of this plenary meeting.

Under the strategic plan, the ICAC is committed to supporting a successful outcome to negotiations in the Doha Round that will result in the elimination of export subsidies, improve market access for agricultural trade and lead to reductions and eventual elimination of forms of domestic support that distort production and trade. In order to help achieve this objective, the Secretariat will continue to provide independent and objective information on the size and nature of government measures affecting cotton production and trade. In addition, the Secretariat will work with the Standing Commit-

tee to provide a forum for discussion of subjects related to government measures during Standing Committee meetings in Washington.

At this time, the Secretariat is unable to achieve one of the strategies regarding government measures envisioned in the Strategic Plan. The Secretariat is currently unable to credibly estimate the impacts of government measures on cotton prices because of apparent changes in the structure of the world cotton market that are not yet fully understood or agreed upon. For a given level of prices, world cotton area is higher today than it probably would have been in the past. As noted earlier, the Secretariat model to estimate season averages of the Cotlook A Index has performed very well, but the residual between model results and actual prices last season raises doubts about the validity of estimates of price impacts stemming from government measures at this time. As noted earlier, this is an ongoing empirical challenge for the Secretariat.

Contract Sanctity

Contract defaults impose costs on the entire cotton chain in the same way that the costs of shoplifting are eventually borne by all shoppers. A related threat to the efficient trading of cotton is that sets of rules for international trade in cotton could multiply, resulting in numerous parochial sets of rules for different regions that would reduce transparency and efficiency in cotton trade. Under the strategic plan of the ICAC, member governments agree to insist on adherence to good trade practices by all members of the cotton trade. The Secretariat is working with the private sector to publicize the negative impacts of contract defaults on world cotton trade, and it is cooperating with industry organizations to facilitate efforts to harmonize trading rules. A breakout session on this topic is scheduled for Wednesday morning to allow discussion of progress toward the standardization of contracts for international trade in cotton since the 64th Plenary Meeting last year in Liverpool.

Under the strategic plan, the Secretariat is instructed to work with the International Textile Manufacturers Federation (ITMF) and other organizations to analyze the structure, conduct and performance of both the cotton and cotton yarn industries to aid in understanding the problem of defaults on cotton contracts. The ICAC might facilitate efforts by ITMF and the International Cotton Association (ICA) to develop a model contract for trade in cotton yarn based on the ICA contract for trade in cotton. The Secretariat has yet to make progress on these strategies but will focus its efforts to ensure progress during the coming year.

Declining Membership

Membership in the ICAC has fallen from more than 50 countries at its peak in the early 1980s to 40 countries presently. As noted last year, the viability of the ICAC as an institution is not yet at risk, but continued reductions in membership

will eventually imperil the organization. Thus, the ICAC needs to refocus efforts at membership growth. The loss of the membership of Japan, Benin and the Philippines in recent years is disturbing. The ICAC is not alone in this concern. The issue of membership was on the agenda of a meeting at the headquarters of the Food and Agriculture Organization of the United Nations in April this year attended by representatives from most international commodity bodies (ICBs) and the Common Fund for Commodities. Other ICBs also reported challenges in maintaining the support of governments.

The arguments for continued government support for the ICAC are strong. As noted by Standing Committee delegates, the ICAC provides public infrastructure in support of the cotton industry that cannot be performed in the private sector. During the CFC/ICB meeting in Rome in April, it was noted that international commodity bodies are political organizations that serve as instruments of cooperation between developed and developing countries. ICBs do not intervene in markets, but organizations like the ICAC influence variables that affect markets. ICBs support economic development through technology transfer and improved market transparency, and their work is of special value to developing countries. However, ICBs are more than just development agencies: the ICAC and other ICBs are instruments of cooperation and communication to the benefit of all participants in the cotton economy.

However, it was also noted at the CFC/ICB meeting that there is not an international consensus on why governments should be involved in commodity organizations, and there are increasing tendencies to narrowly compare costs to tangible benefits without considering the role of ICBs in providing public infrastructure to commodity industries. It is highly gratifying to note that the Standing Committee and the Private Sector Advisory Panel are recognizing the importance of the issue of membership and are taking steps to communicate the positive role of the ICAC within the cotton industry. In particular, during the past year, the Standing Committee formed a Task Force on Membership to begin a campaign of targeted communication to potential member governments, and this effort will be enhanced in the coming year. I also want to acknowledge efforts within the European Commission to raise awareness of the importance of ICBs in world commodity industries. The EC has indicated an interest in joining the ICAC, without exclusive

competence, and such a development would be highly welcome.

Membership in the ICAC is of value to all countries that produce, consume or trade cotton. Membership provides tangible benefits in the form of increased access to statistics and technical information provided by the Secretariat. Membership in the ICAC can lead to increased funding for cotton research through the Common Fund for Commodities. Most importantly, membership in the ICAC provides the avenue for each cotton industry, including cotton textile industries, to join fully into the fraternity of cotton countries in discussions of cotton issues of international scope and significance.

The membership of China (Mainland) is of special significance to the ICAC because of the size of China in the world cotton market, and the strategic plan contains an objective of having China (Mainland) join the Committee. However, this objective will not likely be met in the near future.

Cotton industry officials and government representatives in China have indicated an interest in joining the ICAC if a certain condition is met. The Task Force on Membership considered the issue of the membership of China (Mainland) and determined that it would not be a wise precedent to amend the Rules and Regulations of the ICAC in order to accommodate the interests of a country that was not yet a member. However, the Task Force made clear that all member governments of the ICAC will warmly welcome the membership of China (Mainland), and the Secretariat was instructed to pursue opportunities for pragmatic exchange of information and cooperation.

Acknowledgements

The purpose of a plenary meeting is to move forward through agreements to cooperate and improve. Plenary meetings serve as a vehicle to raise the profile of cotton, provide information crucial to decision making and to facilitate cooperation on matters of shared concern.

It is highly gratifying to note that the governments of Turkey, Burkina Faso, Pakistan, South Africa and Tanzania have extended invitations to the Committee to host future plenary meetings. The Committee has accepted the invitation from Turkey to host the 66th meeting in 2007 and Burkina Faso to host the 67th meeting in 2008, and meetings in 2009 and beyond will be scheduled.

It has been a great pleasure to work with representatives of the Government of Brazil and the Organizing Committee on the preparations for this 65th Plenary Meeting. The Secretariat has received great support from Brazil to ensure that arrangements are professional and also comfortable, and their efforts are much appreciated.

The work of the Private Sector Advisory Panel (PSAP) is contributing substantially and specifically to the effectiveness of the ICAC, and there will be a very interesting report from the PSAP during the Second Plenary Session. I want to thank John Mitchell of Cargill Cotton who serves as CHAIR of the PSAP and all members of the PSAP for their service. Members of the PSAP serve at their own expense, and their contributions are much appreciated. Likewise, Neal Gillen of the United States serves as the ICAC representative to the United Nations Commission on International Trade Law (UNCITRAL). Mr. Gillen represented the ICAC at an UNCITRAL meeting in New York in June where he presented a paper on contract defaults in the cotton industry. His service helps to raise the profile of the ICAC within the UN system and brings increased international attention to the issue of defaults on cotton contracts.

I also want to acknowledge the work of the Standing Committee and its officers. Siphwe Mkhize of South Africa, Elena Cores of Spain and Bilgehan Sasmaz of Turkey worked conscientiously to ensure that the agendas of meetings were focused and relevant and that meetings of the Standing Committee were conducted efficiently. In addition, Jacob Pasgo of Burkina Faso served as CHAIR of the Task Force on Membership, and under his leadership the Task Force conducted open and constructive discussions about membership in the Committee and began efforts to communicate to potential members on a government-to-government basis. I also want to acknowledge Michael Keune of Germany and James Johnson of the U.S. who served as CHAIR and Vice CHAIR of the Subcommittee on Budget. The Subcommittee on Budget is an unglamorous task, but its work is necessary in providing appropriate oversight and government involvement in the management of the Secretariat.

I thank member countries for the privilege of serving as executive director, and I look forward to a successful 65th.

First Plenary Session

Cotton and the Doha Development Round

15:00 hr. Tuesday September 12, 2006
Mr. Flavio S. Damico in the Chair

The CHAIR called the delegate from KAZAKHSTAN to make an announcement. The delegate thanked the organizing committee for its work and Brazil for hosting the meeting. He said he was very pleased to participate in the activities of the ICAC, that his country located between Asia and Europe has achieved good economic development in the last 15 years with GDP growth between 7% and 9% per year, and that the government pays close attention to the development of the cotton sector. The delegate, on behalf of his government, stated that Kazakhstan had an interest in cotton, was prepared to supply information about the cotton sector in Kazakhstan, and was willing to comply with the financial obligations of membership. The delegate asked that Kazakhstan be granted membership in the ICAC.

The Secretary General indicated that as there were no objections from member countries, the membership of Kazakhstan was approved.

The CHAIR called the delegate of ZAMBIA to make a statement. The delegate wished to announce that during the delivery of the country statement of Zambia the following day, his government was going to ask for membership in the ICAC.

The CHAIR, expressing the hope that the Doha Round of negotiations would resume, called Mr. Carlos Valderrama of the ICAC secretariat to present a report on government measures. Mr. Valderrama said that in 2005/06 subsidy levels had declined in most countries and average prices had improved by 4 cents. Nonetheless, as the gap between international and domestic prices in China (Mainland) increased, estimated government assistance in that country increased, and direct government assistance worldwide increased to \$5 billion in 2005/06. In regard to the United States, he said that in 2005/06 the net cost of the upland cotton subsidy program declined by a quarter to just over \$3 billion and that U.S. direct subsidies declined by 20% to 1.9 billion. In addition the cost of the subsidy program for Pima cotton is estimated at \$11 million in 2005/06, and payments to exporters through the subsidy known as the Step 2 program are estimated at \$186 million. Following the conclusion of a special panel of the WTO, the U.S. government eliminated the Step 2 program as of July 31, 2006.

In regard to the European Union, Mr. Valderrama said that payments under the EU Common Agricultural Policy Amounted to \$900 million for cotton in 2005/06 and that a new policy that entered into effect January 1, 2006 converted 65% of the production-linked payments into de-

coupled farm income support, but on September 7, 2006, the European Court nullified the new policy in a decision that will take effect when a new policy is adopted within a reasonable period of time.

In regard to China (Mainland) Mr. Valderrama said that a recent FAO study concluded that subsidies in that country had been substantially lowered since 2002 and that the Chinese government covered the cost of ginning, storage, and transportation through the financing of just 20% of the procurement agencies. Financing policies to control the importation of cotton result in local prices above international prices, and in 2005/06 the differential increased to 14 U.S. cents per pound. These two policies result in an estimate by the Secretariat of \$2 billion in total support of the cotton market in China (Mainland) in 2005/06. Finally Mr. Valderrama said that the direct subsidies other than those in the USA, EU and China, accounted for less than 2% of subsidies worldwide and that of particular interest was the case of countries like Benin that provided small amounts of subsidies in 2004/05 to counter lower prices due to subsidies in industrial countries, but that having no funds to continue to help farmers subsidies were canceled in 2005/06 and cotton production declined dramatically. The *Production and Trade Policies Affecting the Cotton Industry* is part of the documents of the meeting.

The CHAIR called Mr. Chiedu Osakwe, Director, Doha Development Agenda (DDA) of the WTO to report on the recent developments in the WTO. Mr. Osakwe said that the negotiations in the Doha round, including the negotiations of the trade aspects of cotton, were suspended July 24, 2006, but that several countries had indicated that they will continue to work on the development aspects. He added that the ICAC has a strong role to play on development aspects assistance, that the strong support of the ICAC for a successful DDA conclusion continues to be relevant, and that the WTO would welcome strong ICAC support for the resumption of the suspended Doha negotiations. He reviewed the two-year history of the development aspects work and said that development assistance has increased substantially in special agricultural support such as seed multiplication and bio-safety programs; capacity building; trade promotion; debt relief; macroeconomic and budgetary support; and commodity price risk coverage instruments. He mentioned that the WTO now has a table with 184 entries, where cotton development assistance projects are cataloged. With respect to the trade aspects, Mr. Osakwe said that under the July Framework Decision there is a commitment to address cotton ambitiously, expeditiously and specifically, and that progress

in Hong Kong resulted in the elimination of all cotton exports subsidies by 2006, tariff and quota free access to cotton exports from LDC's and an agreement that trade distorting support in cotton would be reduced more ambitiously than the agreed general formula and over a shorter period of time. Finally, Mr. Osakwe said that the full benefit of the outcome for cotton depends on the coherence between trade and development aspects. His presentation is a statement of the meeting.

The CHAIR introduced Mr. Marcos Sawaya Jank, President of the Brazilian Institute for International Trade Negotiations, to present a paper on the repercussions of the international litigation of Brazil against U.S. upland cotton. Mr. Sawaya Jank said that there are not yet any repercussions from the WTO case 267 whereby Brazil contested the U.S. subsidy practices on behalf of the local cotton sector, as there has not been full action by the United States as mandated by the WTO panel. He said that the degree of complexity of the negotiations was such that a fourth interest group, the G33 made of some South and East Asian countries, had joined the US, EU and the G20. He added that since the WTO negotiation under the Uruguay Round did not include permitted and not-permitted subsidies, but rather amber, blue and green box subsidies. The strategy of the United States was to shift amber box subsidies to the blue box in order to convert prohibited subsidies into permitted ones. He also said that there is the possibility that the United States shifts support among commodities and that it was in the interest of Brazil to impose caps on overall agricultural products as well as in individual products. Finally, Mr. Sawaya Jank stated that now that the Doha Round is suspended the only limit for the USA is case 267, and that the aim of Brazil is to promote an immediate implementation of the cotton case 267. He said that a conclusion of the Doha round is possible only if the US cuts or decouples subsidies, and provides support to the Cotton Initiative. His presentation is a statement of the meeting.

The CHAIR called the delegate of MALI to present his views on the Doha process. The delegate referred to the symbolic nature of cotton in the WTO negotiations, stemming from the characteristics of the cotton sector where the poorest countries compete with the richest, and the weak ones cannot play on a leveled field because the rules are not written in a fair way. He added that cotton illustrates that more than skills at negotiating are needed. There is a moral imperative to conclude an equitable negotiation, as the role of cotton in a country like Mali, where cotton accounts for 60% of export revenue, is very different than in the United States. He

added that all the poverty alleviation speeches made by the governments of industrial countries are in vain, as they provide subsidies that create poverty in developing countries. Further, the negotiations in the WTO failed because industrial countries could not agree among themselves, and yet the cotton issue is not solved and poor countries become poorer. The delegate finally stated that the best way to help someone is to teach and let them live with their own wealth, but that subsidies in rich countries do not allow developing countries to support themselves. Rich countries are left with subsidies in one hand, and poverty alleviation aid on the other. His report is a statement of the meeting.

The CHAIR called Ms. Raquel Gomes, representative of Oxfam, to report on a breakout session on the development aspects of the Doha Round. Ms. Gomes said that the session concluded that the key issue at hand was that the trade-distorting agricultural subsidies continue to depress cotton prices, hurting millions of cotton farmers in developing countries. The losses in income, employment and export revenue are larger than the assistance committed thus far. It was noted that the African cotton sector

welcomes support from donors to improve the efficiency and productivity of their cotton sector, including 1) investment in research and training, 2) support to improve quality and classification systems, 3) help with marketing know-how and increases in funds for countries in most need. Concerns were raised for the lack of implementation of committed assistance, and it was stressed that the substantial gap between commitments and disbursements has to be closed. It was also stressed that African countries need to work more to attract investment and improve competitiveness in the textile sector and the recipient governments have the responsibility to establish or strengthen institutions through which assistance is channeled, increase transparency of assistance funds, and support their own cotton sectors. Finally, Ms. Gomes said that there is a need for other factors affecting the competitiveness of African cotton, in particular exchange rate fluctuations and the impacts of second hand clothing on the African textile industry.

[The Summary on the Development Aspects of Cotton can be located on page 44.]

The CHAIR opened the floor for discussion and recognized the delegate of BRAZIL, who pro-

posed that the Secretariat of ICAC organizes an annual workshop on the trade and development aspects of the Doha round in order to maintain the dialogue in international cooperation and promote coherence between trade and development policies.

The delegate of the UNITED STATES said that his government restricted the program GSM 102 and eliminated GSM 103 and the Step 2 program, and that those steps partially addressed the issue of price suppression. The Delegate found it unfortunate that the U.S response was called into question and added that his country supports the DDA and is fully committed to the round of negotiations.

The delegate of CHAD congratulated the panelists and supported the petition of Brazil.

Mr. Sawaya Jank, in response to the remarks of the Delegate of the United States, said that the United States' moves were in the right direction on the GSM and Step 2 programs, but that more implementation was needed in domestic support.

The CHAIR offered a brief summary and adjourned the session at 16:40 hrs.

Second Plenary Session

Statements

9:00 hr. Wednesday September 13, 2006
Mr. Savio Rafael Pereira in the Chair

The CHAIR thanked the ICAC to have invited him to participate in its 65th Plenary Meeting and in particular to chair the Second Plenary Session. He reminded the delegates that all oral statements must be limited to five minutes.

The CHAIR recognized the representative of the FAO (Food and Agricultural Organization), Commodities and Trade Division (CDT). He reported that the CDT works closely with the ICAC on many activities on cotton. He mentioned several areas of work on cotton within the FAO, including their webpage dedicated to cotton, cooperation with the WTO and the European Union in a development program for African countries, and efforts to incorporate a module on cotton on their multi-commodity economic model. FAO and the ICAC are working on a survey of apparel fiber consumption (to be published later this year) and projections of cotton production, trade and consumption up to the year 2015 (to be published in the first half of 2007). The FAO is also preparing the 2007 China International Cotton Conference, and leading efforts to prepare the International Year of Natural Fibers (IYNF) in 2009. To this objective, the representative of the FAO called on countries to support a United Nation resolution declaring 2009 the IYNF. He also called on governments and industry bodies in the cotton producing countries to help fund this event. The

FAO report is a statement of the meeting.

The CHAIR recognized the representative of CIRAD (Centre de cooperation international en recherche agronomique pour le développement) who reported on the social, economic and environmental impacts of cotton production in West and Central Africa. He explained that cotton is a major contributor to the economies of countries in this region, providing employment for millions of people, encouraging producers to organize in local and national groups, and improving the livelihood of populations in rural areas. He also reported that regarding environmental impacts, the lack of fertilizers leads to a loss of soil fertility in cotton producing areas, but plant protection is overall well managed and risks of pollution are minimal. He noted that the use of BT cotton may have a slight positive impact on human health by reducing the amount of applied insecticides; however, there are concerns regarding the difficulty of keeping BT and non-BT cotton cultures separated, and the risk of insect resistance (which may be reduced by the use of stacked-genes. Finally, he raised the issue of social and economic risks linked to the use of BT seeds. CIRAD's report is a statement of the meeting.

The CHAIR called on the representative of CIRCT (Central Institute for Research on Cotton Technology), who reported on a CFC project to use cotton stalks, produced in massive quantity in India and often considered as waste, as raw

material for the particle board industry. The first step of the project was to evaluate the economics of the logistics of cotton stalk collection, pre-processing and storage. This study found that it is more economical to uproot cotton plants stalks, clean and chip them in the field itself before transportation to the plant. CIRCT's report is a statement of the meeting.

The CHAIR called on the Chairman of the Stakeholder Meeting of the ICAC and CFC on September 10, 2006, to report. He said that the meeting discussed possible key themes for future cooperation between the ICAC and the CFC, including supply chain management, diversification, market access and market development. Participants suggested numerous topics, including follow-up on an IPM study, vertically integrated production and marketing chains, value-addition through cotton processing, etc. It was suggested that the Executive Director initiates consultations with member countries to explore further the multi-country/regional priorities for support to cotton producers and present them in due course to the CFC in the form of its proposed cotton priority program for the Fund's third Five Year Action Plan (2008-2012). His report is a statement of the meeting.

The CHAIR recognized the representative of the EUROPEAN UNION (EU), who talked about three issues: agriculture, development and trade. He reminded that the EU is a small and marginal cotton producer and exporter, but imports large

quantities of cotton for the EU textile industry, thus supporting world prices. The reformed EU cotton program, in effect since 2006, includes 1) a 65% decoupled support payment to cotton producers and 2) a new production aid dependent on cotton area and limited to a maximum base area per member state. Payments are subject to compliance with environmental and sanitary standards. The new cotton regime is expected to result in a decline of EU cotton production. Implications of the recent annulment of the EU cotton regime by the European Court of Justice will have to be studied carefully. Considerable funding has been mobilized by the European Commission (EC) for the EU-Africa Partnership on Cotton and by EU member countries for their own cotton assistance programs. Implementation of these programs is expected to take place in 2007. The EU played an active role in the WTO DDA negotiations, both in the EU-Africa Partnership on Cotton and as the only party in the WTO besides the C4 countries to submit written proposals on cotton. The EU is committed to support African cotton producing countries in the WTO negotiations on cotton and to reform distorting cotton policies in the world. The EC is disappointed by the suspension of the DDA talks in July 2006 and is ready to quickly resume these negotiations. The representative recalled that the EU wishes to become a full member of the ICAC in the near future and expressed appreciation for the organization of the 65th ICAC Plenary Meeting and thanked the host country. The EU's report is a statement of the meeting.

The CHAIR recognized the delegate of CICC (Committee for International Cooperation between Cotton Associations). He reminded that the objectives of CICC are to facilitate international cooperation between cotton associations, examining matters of common interest to member-associations, and working together for the purpose of preserving cotton trading ethics. CICC encourages standardization of international trading rules and also cotton testing and classification, and publishes a list of unfulfilled arbitration awards. CICC acts as a forum for its member organizations in promoting and distributing information regarding trading rules, classification, standardization and testing. CICC is pleased to report the recent membership of the African Cotton Association. The delegate of CICC thanked the ICAC and the host country for their invitation to speak and looks forward to the success and progress of the deliberations at the 65th ICAC Plenary Meeting. CICC's report is a statement of the meeting.

The CHAIR recognized the delegate of ZAMBIA, who thanked the chairman of the standing committee of the ICAC to have invited his delegation to the 65th Plenary Meeting of the ICAC, and the organizing committee. He reported that Zambia is now the second largest producer of cotton in southern Africa, and the domestic cotton sector is an important contributor to

the national economy. However, the Zambian cotton sector faces several challenges to the development of cotton production. Zambia appreciates the positive contributions of the ICAC to the development of cotton in the world. The delegate, on behalf of the Government of the Republic of Zambia, formally requested the CHAIR to solicit the support of the Committee to admit Zambia as a member of the ICAC. The delegate assured that Zambia would meet all its commitments, including financial obligations, to the ICAC as a full member. Zambia's country report is a statement of the meeting.

The CHAIR thanked the delegate of Zambia and confirmed acceptance of Zambia as a full member of the ICAC.

The CHAIR recognized the delegate of IFCP (International Forum for Cotton Promotion), who reminded that the objective of the IFCP is to gain market share for cotton at the expense of chemical fibers, by encouraging national programs for cotton promotion. He welcomed the recent membership of Conalgodón, the Colombian Cotton Federation, to the IFCP. He reported on the progress of different IFCP programs, including Cotton Sponsor and "Cake Denim," and promotion efforts in China (Mainland). He reminded that the priority is to build demand for cotton. The IFCP report is a statement of the meeting.

The CHAIR recognized the representative of UNIDO (United Nations Industrial Development Organization), who thanked the Executive Director of the ICAC and the organizing committee. He presented the UNIDO/WTO new cotton initiative for African countries, a program proposal on development of the cotton, textile and garment (CTG) value chains and networks in Africa. This proposal is in line with priorities expressed in the Doha Declaration during the 4th WTO conference, the Millennium Development Goals, the New EU Action Plan on Agricultural Commodities, Dependence and Poverty and its specific actions for cotton, and with the priorities expressed by UNIDO member states. The key beneficiaries of the first phase of the program are 11 Sub-Saharan countries producers of cotton. The main objectives of the program are 1) to enhance the competitiveness of the Supply Capacity of the CTG Chain; 2) to ensure the conformity of CTG products with international standards; and 3) to connect efficiently CTG products to national, regional and international markets. UNIDO's report is a statement of the meeting.

The CHAIR thanked the delegate of UNIDO for his presentation and invited statements from member countries.

The CHAIR recognized the delegate of POLAND who offered his congratulations for the organization of the 65th Plenary Meeting of the ICAC. He reported that Polish cotton consumption and imports declined significantly in 2005

due to increased competition from low-priced Asian imported textile products in a quota-free trade environment. The Polish textile industry manufactures high quality products, which face strong competition from imports coming from countries that do not always apply fair practices. Polish cotton consumption could fall to about 30,000 tons in 2006. The Polish cotton sector is now almost entirely privatized. The mission of the Gdynia Cotton Association (GCA) is to create an economically and structurally strong cotton sector in Poland and internationally. The GCA promotes fair trade rules, periodically organizes trainings and seminars, cooperates with the major European and international cotton organizations and participates in numerous European and international cotton forums. The Polish government supports the efforts aimed at pursuing DDA negotiations. Poland's country report is a statement of the meeting.

The CHAIR recognized the delegate of SUDAN, who thanked the president of the organizing committee, the host country, and the ICAC. He said that cotton is one of the most important crops produced in Sudan, affecting the livelihood of more than 300,000 families. To improve the Sudanese cotton sector, the government is implementing new measures, including: a structural reorganization aiming to make the farmer responsible for all production operations. The government has also started a rehabilitation plan to modernize structures in the ginning and textile sectors. Cotton producers in Sudan suffer from low productivity and low prices. The delegate requested more transparency on global marketing of cotton. Sudan's country report is a statement of the meeting.

The CHAIR recognized the delegate of KAZAKHSTAN. He thanked the ICAC for supporting accession of Kazakhstan to the ICAC. He presented briefly the geographic, economic, and politic situation in Kazakhstan and reported a recent expansion in domestic cotton production. He reported that the government supports the Kazakh cotton sector and presented the "Cotton-Textile Cluster" located in the south of the country, in which incentives to invest are numerous. He noted that Kazakhstan has a competitive cost of production of cotton. He thanked the host country. Kazakhstan's presentation is a statement of the meeting.

The CHAIR recognized the delegate of UGANDA, who thanked the host country, the ICAC Secretariat and the Organizing Committee. She reported that cotton production fell to 19,000 tons in 2005/06 due mainly to drought and the fall in farm-gate prices. However, the private sector continues to support cotton production. Farm-gate prices increased slightly in 2005/06, following the increase in international cotton prices. Domestic cotton consumption continued to be very low, and almost all cotton produced was exported. The quality of the lint dropped slightly due to drought. Uganda is in the process

of upgrading their HVI instrument through support from a CFC/ICAC project. Research efforts continue to improve productivity and quality of the fiber, as well as to prepare for the testing of Bt cotton. She noted that cotton subsidies in developed countries and the lack of domestic value addition are the two main challenges to cotton production in Uganda. Uganda's country report is a statement of the meeting.

The CHAIR gave the floor to the chairman of the Private Sector Advisory Panel (PSAP), John Mitchell, who reported on the activities of the panel. The panel considered the creation of an associate membership category for the private sector as a means to increase participation in the committee, and requested the Executive Director to first study the risks and benefits of this action. The Panel noted that it is necessary that the private sector support the work of the ICAC and encourage non-member governments to join. The Panel discussed the issue of excess moisture in baled cotton, which becomes increasingly problematic, and suggested that governments prohibit the addition of liquid after ginning. The Panel reviewed the work of the IFCP and suggested not to limit its efforts to national, fully developed marketing plans and to consider smaller-scale, regional and low-budget activities that may be implemented at a sub-national level. The Panel also recommended that the IFCP be more active in addressing inaccurate and negative statements in the press about conventional cotton production by disseminating balanced and unbiased information regarding renewable and sustainable cotton production. Finally, the PSAP agreed to a mid-year meeting in 2007, possibly in an Asian country. Mr. Mitchell urged the Standing Committee to support these recommendations. Mr. Mitchell's remarks are a statement of the meeting.

The CHAIR recognized the delegate of COTE D'IVOIRE, who thanked the host country, the delegates, observers, and the Secretariat of the ICAC. He noted the persistence of low international cotton prices despite the efforts of governmental and non-governmental organizations. He noted that cotton subsidies in developed countries are an important factor in the low level of international prices, and the economies of African countries like Cote d'Ivoire are very dependent on revenues from cotton. He raised the issue of the suspension of WTO negotiations of the Doha Round, and said it was necessary to find solutions in order to treat cotton separately from other commodities and seriously. His remarks are a statement of the meeting.

The CHAIR recognized the delegate of ARGENTINA, who raised the issue of the suspension of WTO negotiations in the Doha Development Round and said the failure of these negotiations would result in a weakening of multilateral trade and losses for least developed countries and developing countries. He reminded the important steps that had been agreed about market access,

domestic and exports subsidies, and rapid elimination of cotton subsidies before the suspension of the Round and which cannot be implemented outside of the WTO. Argentina will work with other members of the Cairns group to restart the dialog as soon as possible. He noted that all subsidies and trade barriers distort cotton production and trade and affect cotton producers in countries without subsidies. He reiterated Argentina's interest in resuming WTO negotiations. Argentina's remarks and country report are statements of the meeting.

The CHAIR recognized the delegate of PAKISTAN, who noted the significant role of cotton and cotton textiles in their national economy. Pakistan cotton production reached high levels in 2004/05 and 2005/06 compared to the past decade, and is projected at 2.35 million tons in 2006/07. Pakistan's Ministry of Food, Agriculture and Livestock developed Cotton Vision 2015, a program to increase domestic cotton production and consumption. The domestic cotton textile sector has grown significantly and more emphasis is given to exports of higher value added textile products. He said that more importance would be given to improving fiber quality and reducing contamination in the future. He thanked the ICAC, the host country and the Organizing Committee. Pakistan's country report is a statement of the meeting.

The CHAIR recognized the delegate of INDIA, who reported that as a major cash crop and a major raw material for the textile industry, cotton contributes significantly to India's economy. At around 9 million hectares, India's cotton area is the largest in the world. In 2005/06, cotton production reached a record 4.15 million tons, marginally up from the previous season's record. Despite less favorable weather, the average national yield continued to increase in 2005/06 thanks to continued transfer of technology from research to the field, in which the Technology Mission on cotton (especially Mission I and II) played a major role, and resulting in better and lower-priced seeds, reduced pesticide use, and increased cultivation of Bt cotton. Total consumption of cotton increased by 12% to 3.69 million tons in 2005/06. The Government of India has liberalized cotton exports since July 2001. Area is expected to grow by 3% in 2006/07 to 9.1 million hectares. Measures have been taken to improve the quality, productivity and production of cotton in the country. The commercial use of BT cotton, authorized since 2002/03, has improved yields. The Technology Mission on cotton, consisting of four Mini Missions, is improving the quality and productivity of Indian cotton. The Government of India has continued to promote Integrated Cotton Cultivation or Contract Farming Scheme. The delegate thanked the ICAC and the City of Goiânia, the state of Goias, the host country, and the cotton industry in Brazil. India's report is a statement of the meeting. India's country report is a statement of the meeting.

The CHAIR recognized the delegate of GERMANY, who reported that the downward trend in cotton imports that has persisted for years accelerated in 2005. Cotton processing, spinning and weaving suffered once again sharp declines in output. The process of restructuring and internationalizing the German textile and clothing industry continued. The import surplus of cotton yarn increased further, but there is still an export surplus for cotton fabrics. The German cotton industry began 2006 with further declines in output. Domestic demand for textiles and clothing remains restrained. Despite increased international competition, the German textiles and clothing industry believes in further potential for growth in foreign markets and in a focus on high-value and innovative products. Germany has long been an advocate of open markets and trade liberalization on the basis of clear, predictable and multilaterally coordinated rules. The German government will do all it can to bring the WTO negotiations to a successful conclusion. Germany's country report is a statement of the meeting.

The CHAIR recognized the delegate of BURKINA FASO, who noted that since 2004 there have been three cotton organizations in the country: SOFITEX, SOCOMA and FASO COTON. In the first quarter of 2006, two new organizations were created: APROCOB (Association professionnelle des sociétés cotonnières du Burkina Faso), which includes the three cotton societies, and AICB (Association Interprofessionnelle du Coton du Burkina Faso), which includes APROCOB and the UNPCB (Union Nationale des Producteurs de Coton du Burkina Faso), the union of cotton farmers. He described briefly the actions of the main actors in the cotton sector: the government, the three cotton societies, the cotton producers, the national research institute, and banks. He noted that domestic cotton production reached a record of 300,000 tons in 2005/06, making Burkina Faso the first African cotton producer and exporter, and that fiber quality significantly improved. However, the cotton sector still faces two important challenges: cotton subsidies in developed countries and the unfavorable exchange rate between the euro and the U.S. dollar. In March 2006, measures including a price smoothing fund were adopted, in the objective to reduce production costs. He said that Burkina Faso supports the proposition of Brazil's delegate to organize annual workshops focused on trade and development during future ICAC Plenary Meetings. He noted that Burkina Faso is pleased to welcome the 67th ICAC Plenary Meeting in 2008, and invited all cotton producing countries. He thanked the ICAC. His remarks and Burkina Faso's country report are statements of the meeting.

The CHAIR recognized the delegate of AUSTRALIA, who reported that Australian cotton sector faces continued difficulties linked to drought, but continues to invest in order to

improve water use efficiency, in particular with the Best Management Practices program. In addition, the generalized use of GM cotton has allowed a significant reduction in the quantities of pesticides applied. Australia is very disappointed by the suspension of the Doha Round of trade negotiations but will continue to work with the Cairn Group to secure fundamental reforms of world agriculture. He noted that subsidies maintain cotton production at higher levels than otherwise in some developed countries, reducing export opportunities for developing countries. The Australian cotton industry supports the move towards trading on instrument based classing systems. The delegate thanked the Brazilian government and the State of Goiás, the City of Goiânia, and the ICAC. His remarks and Australia's country report are statements of the meeting.

The CHAIR recognized the delegate of SPAIN, who reported a significant decrease in planted cotton area and projected production in 2006/07, due mainly to the implementation of the new EU cotton regime. She noted that in this new regime, 65% of the support payments are decoupled and 35% are coupled to the cotton area. Following the decision of the European Court of Justice on September 7 to nullify the new EU cotton regime, the present assistance regime will be maintained until further notification. She said that as a result, it is difficult to make any projections regarding the impact of this decision on the cotton situation in Spain. Her remarks are a statement of the meeting.

The CHAIR recognized the delegate of UZBEKISTAN, who reported on the developments in the Uzbek cotton sector since the 64th Plenary Meeting. Research was conducted on new cotton varieties with high fiber qualities; progress was made regarding instrument classing; and infrastructures (in particular cotton terminals) were improved; the Uzbek commodity exchange started to trade cotton; trade activities with China were encouraged; exports of cotton to South-East Asia were encouraged; the first Uzbek Cotton Fair took place in Tashkent. The delegate said that the next Uzbek Cotton Fair will take place on October 17, 2006 in Tashkent and invited all delegates. He thanked the Organizing Committee and the host country. His remarks are a statement of the meeting.

The CHAIR recognized the delegate of COLOMBIA, who thanked the ICAC and its staff, and the Organizing Committee. She noted a significant drop in cotton area and production in Colombia in 2006, due to persistent low international cotton prices as well as a strong reevaluation of the domestic currency, and despite government support to cotton producers. The Colombian government is disappointed by the suspension of Doha negotiations, and the only option for Colombia is now to push ahead for bilateral negotiations. Colombia finalized in 2006 an agreement of free trade with the United

States, which is expected to come into effect in 2007. She urges the ICAC and all delegations to continue efforts to make DDA negotiations continue. She thanked the official and private representatives of Brazil. Her remarks and Colombia's country report is a statement of the meeting.

The CHAIR recognized the delegate of CHINA (TAIWAN), who noted that their textile industry must make major changes in order to be able to compete successfully in a quota-free trade environment. In particular, it is necessary for manufacturers of spun yarn and fabric to shift to the manufacture of functional and industrial textile products in order to differentiate their products from those of China (Mainland) and other Southeast Asian countries. He then gave a brief overview of China (Taiwan)'s textile industry. China (Taiwan)'s report is a statement of the meeting.

The CHAIR recognized the delegate of EGYPT, who welcomed Zambia and Kazakhstan as new members of the ICAC, and thanked the City of Goiânia, the ICAC, the interpreters and all who organized the Plenary Meeting. He reported that Egypt has a significant role in producing high quality cotton, and is careful to utilize technologies to produce cotton of high quality and free of contamination, and also to limit the use of pesticides. He noted that Egypt supports the liberalization of the cotton industry. Egyptian cotton production and exports decreased significantly in 2005/06. Area is estimated at 550,000 feddans in 2006/07, down from last season due to better profits achieved from alternative crops in 2005/06. He reported the efforts of the Egyptian cotton sector to develop varieties with improved fiber characteristics and/or more adapted to drought, salinity and high temperatures, to modernize Egyptian gins and develop classing systems. His remarks and Egypt's country report are statements of the meeting.

The CHAIR recognized the delegate of CHAD, who thanked Brazil, the City of Goiânia and the ICAC Executive Director and staff. He noted that cotton has an important social and economic role in Chad, and the domestic cotton sector suffers from the low international cotton prices. In addition, Chad's cotton sector faces numerous challenges: low yields, lack of inputs, quality problems, cost of production, and unfavorable exchange rate. Chad and three other West African countries developed the Cotton Initiative against unfair subventions, and Chad asks the ICAC to renew its support to the Cotton Initiative. He welcomed Zambia and Kazakhstan to the ICAC. His remarks are a statement of the meeting.

The CHAIR recognized the delegate of SOUTH AFRICA, who apologized for the absence of the South African delegation due to travel difficulties. He welcomed Kazakhstan and Zambia to the ICAC and congratulated them for their ef-

forts. He hopes to see Angola and Mozambique join the ICAC in the future. He reported that production of cotton in South Africa declined to about 17,500 tons in 2005/06, down 20% from the previous crop year. Cotton consumption has declined significantly in recent years due to continued imports of low-priced textiles and apparel, mainly from China and also because of the relative strength of the Rand against the U.S. dollar. He said that South Africa supports the continuation of WTO negotiations, and supports the Brazilian proposal that ICAC organizes annual workshops or seminars focusing on trade and development. South Africa's country report is a statement of the meeting.

The CHAIR recognized the delegate of the UNITED STATES, who thanked the Government of Brazil, the Government of the State of Goiás, the Brazilian cotton industry, the ICAC Secretariat, and all contributing organizations to the 65th Plenary Meeting of the ICAC. He referred the other delegates to the US country report, which is a statement of the meeting. US cotton production is forecast down in 2006/07 due to dry conditions in the southwest part of the country. US exports are also forecast down in 2006/07 due to tighter stocks and increase in foreign competition. He noted that the US recognizes the opportunities offered by biotechnology for improving cotton sustainability, and supports a transparent, rigorous and coordinated regulatory system for all technologies. He commended the ICAC and the Executive Director for its initiative and commitment to the use of standardized international trading rules for cotton and the adoption of instrument testing. The US supports the work of the IFCP and commends the work done by the ICAC with the private sector to publicize the negative impacts of contract defaults on world cotton trade. He thanked the all those responsible for organizing the meeting. His remarks and the US country report are statements of the meeting.

The CHAIR opened the floor to non-member countries. He recognized the delegate of Mozambique who noted the strong importance of cotton in the country's economy. Cotton production varies from 30,000 to 40,000 tons. The government of Mozambique is taking measures to support the cotton sector, and the private sector supplies inputs to cotton producers. Challenges to Mozambique cotton production include poor production and plant protection practices, lack of inputs and credits to buy them, weak farmers groups, lack of profit for producers due to low prices, and the collapse of the domestic textile industry. He enumerated the priority areas of intervention identified to support cotton production in Mozambique. He noted that their hope is to produce 43,000 tons of lint in 2006/07, and increase the use of instrument classing. He invited all attendants to the Plenary Meeting to visit the Mozambique cotton sector. Mozambique's country report is a statement of the meeting.

The CHAIR recognized the delegate of Mexico who thanked the Organizing Committee. He explained recent efforts of the Mexican government to support Mexican cotton producers and production. He explained how the increased used

of BT cotton resulted in a decreased pesticide use and their efforts to increase the use of HVI machinery to class cotton. He thanked the host country. Mexico's country report is a statement of the meeting.

The CHAIR thanked the delegates and adjourned the second plenary session at 13:15 hrs.

First Open Session

Cotton Production: Efficiency and the Environment

11:00 AM, Monday September 11, 2006
Mr. Joao Carlos Jacobsen Rodrigues in the Chair

The CHAIR welcomed delegates to Brazil and to Goias and expressed his hope for a good discussion and decisions on the evaluation of the impacts of cotton growing on the environment.

The CHAIR introduced Mr. Felix Balaniuc of Social Cotton Institute, Brazil, to present a report on Environmental Issues in Brazil. Mr. Balaniuc reported that capitalist economic model and technological advances in industry and agribusiness have been the main source of environmental degradation in the world, including Brazil, where soil, water, atmosphere, vegetation, fauna and flora suffer serious damage, including pollution, ecosystem degradation and serious bio damage. He suggested that now is the time to make a commitment to adopt social and environmental principles for sustainable development and environmental preservation in all agri-business activities. Mr. Balaniuc reported that the cerrado is a new cotton frontier accounting for 80% of Brazilian cotton production. Mr. Balaniuc noted that Brazilian environmental legislation, comprising 17 ordinary laws and a special chapter in the Federal Constitution, states that everyone is entitled to an ecologically balanced environment, thereby creating a duty to defend and preserve it on government and society at large for present and future generations. He described principles of the Brazilian environmental law, including, precaution, prevention, international cooperation, sustainable development, common participation and the polluter-pays principle. Mr. Balaniuc indicated that faced with environmental degradation a new model for rural entrepreneurship has been developed in Brazil, where a continued market presence and business success depends on use of strategies that include environmental, social and economic sustainability, and which are based on pillars of sustainable development. He noted that sustainable development is economic, social and environmental management capable of fulfilling the needs of the current generation, without compromising the potential to fulfill the requirements of future generations and that modern businessmen are committed to conserving and protecting the environment. Mr. Balaniuc stated that international trade requires social and environmental certification as a condition

for trading and as a compensation for losses caused by cuts in internal subsidies required by the WTO. He said that these measures have substantially increased production costs that must be included by rural entrepreneurs in planning economic costs of production. He noted that modern, socially responsible businessman produce and sell product respecting the ethical principles of social justice and environmental conservation and as such will have a strong competitive advantage in the market. Mr. Balaniuc informed that AMPA (Mato Grosso Cotton Producers Association), created in 1997 and uniting 600 producers, is aware of new requirements for social, and environmental certification and responsibility, and created the IAS (Cotton Social Institute) in 2005, with financial support from FACUAL (Cotton Support Fund). He said that the IAS mission is to guide and train cotton producers on issues of social and environmental responsibility, occupational health and safety, provide initial diagnosis, monitor and issue a certificate, the IAS Seal. He mentioned that the IAS works in partnership with the ABIT (Brazilian Clothing and Textile Industry Association) and with the ANEA (National Cotton Exporters Association). Mr. Balaniuc noted that the IAS target is to grant the IAS Seal to all AMPA members in 2007/08.

A delegate of PAKISTAN asked whether sustainable production can be achieved by adopting better management practices and whether there is a negative impact on yields with the lesser use of agricultural inputs and pesticides as a result of efforts to improve the environment.

Mr. Balaniuc answered that new improved crop management practices will improve yields even with reduced use of chemicals and pesticides.

A delegate of SOUTH AFRICA praised the work done by senior Edon Lobado, Senior Alysoon Paolinelli and Dr. Colin McClieng in soil science and policy implementation that opened the vast cerrado region to agricultural production, still emphasizing environmental practices in order to sustain livelihood. That is why they are recognized with the World Food Prize, 2006.

A delegate of EGYPT asked about the cost of the certification to the producer.

Mr. Balaniuc answered that the process is possible because of a financial support by FACUAL (Cotton Support Fund) and the goal is to certify

all members by 2007. His report is a statement of the meeting.

The CHAIR introduced Dr. Francesca Mancini, Food and Agriculture Organization (FAO) of the United Nations (UN) to present a report on Impacts of Farmer Field Schools on Cotton Growers in Asia. Dr. Mancini reported that more than half of the world's cotton lint is produced in Asia, often on very small plots of land, cotton is the only crop providing extra cash to millions of families of small-scale Asian farmers and provides employment to even larger population of low-salary factory workers. She noted that in these countries promoting cotton cultivation is an important part of development strategies to reduce poverty. Dr. Mancini reported that massive use of pesticides in cotton cultivation, estimated at 20% of global insecticides and 30% of all pesticides use in Asia, has negative environmental and social effects, including build up of pest resistance, increasing cost of inputs, declining profitability, detrimental effects on agro-biodiversity along with depletion and contamination of fresh water sources, exposure of agricultural workers to some of the most toxic chemicals and adverse effects on health of women and children in particular. She indicated that before the introduction of genetically modified crops, Integrated Pest Management (IPM) was designed to contain the need for chemical products and in the late 1980s a new participatory approach to IPM training, called Farmer Field Schools (FFS), was implemented, as a season-long training course conducted in villages for small groups of farmers (25-30). Dr. Mancini said that the FAO-EU IPM program for cotton in Asia was implemented from 1999 to 2004 in 6 countries: Bangladesh, China (Mainland), India, Pakistan Philippines and Vietnam, and involved 3,661 FFS's and nearly 100,000 cotton growers trained, resulting in increased farmers' returns, improved health of farming communities and reduced environmental contamination. She presented examples of the effects of the FFS's, including 78% reduction of pesticide use and a decline in applications from 7.9 to 1.7 without compromising crop yields in 73 IPM converted systems in Andhra Pradesh, India. Dr. Mancini noted that introduction of Bt cotton in China (Mainland) in 1996 and in India in 2002 is credited with increased yields, and profits, along with reduced pesticide use. However comparative field research carried out in Hubei province in

China (Mainland) in 2002 found that the amount of pesticide use on Bt cotton by non-IPM farmers was around three times higher than that used by IPM farmers. She said that IPM FFS's effects include benefits in terms of economic resilience of farmers' households. Dr. Mancini concluded that the IPM adoption on a large scale would make possible savings of US\$ 500-1,000 annually and promotion of the use of environmental control methods continue to be a pertinent way to minimize the risks associated with pesticide use, and the evidence on the pesticides' social costs confirms the urgent need for policy interventions that ban the use of hazardous pesticides belonging to the WHO toxicity class I and II. She said that raising consumer awareness and increasing industry's civil responsibility would catalyze the change towards a better regulation of pesticide use and there is a need to reduce the impact of cash crops on the environment without compromising farmers' economical livelihood. Dr. Mancini recommended collaboration among the public and private stakeholders, interdisciplinary cross-departmental research programs to provide the technical means to achieve an ecologically, economically and socially acceptable production of cotton.

The CHAIR noted that the use of new technologies such as Bt cotton could prevent millions of cases of poisoning associated with the use of chemicals.

The delegate of the NETHERLANDS noted that he is working in West Africa, in Benin to develop more sustainable cotton production and one of the solutions for farmers is called LEC (Lutte Etagere Ciblee). He asked if LEC resembles IPM (Integrated Pest Management) approach used in Asia and if this approach is necessary not only for reasons of health and the environment, but also to reduce dependence of farmers from producers of chemicals and pesticides. He also asked about the effect of IPM on yields and quality of cotton and if producers could get a better price for a better product produced in a more sustainable way.

Dr. Mancini replied that IPM will reduce dependency of farmers on producers of chemicals and is beneficial for yields, quality and reduces the cost of production.

A delegate of PAKISTAN said that FFS focus on pest identification and pest scouting. He asked whether the ultimate recipe to minimize pesticide use in pest management through cultural and biological control, as Bt cotton is also a half solution.

Dr. Mancini replied that cultural education is important and Bt cotton should be complemented with better management skills.

A delegate of INDIA said that in India in the last 2-3 years we are witnessing increasing productivity with reduced use of pesticides, and though IPM is important, India feels that most of the gain came from the use of Bt cotton. He noted

that now there is still confusion about the use of Bt cotton among researchers, farmers and consumers. He asked whether the use of Bt cotton should be promoted by the ICAC and FAO.

Dr. Mancini replied that BT cotton was introduced in India in 2002 and it is important to monitor and scientifically evaluate the results.

A delegate of SUDAN said that the issue of reducing the use of pesticides while maintaining high productivity has been discussed for quite some time. He noted the experience in Syria where during the last 10 years no chemicals were used on 95% of cotton area and Syria is still one of ten countries with highest yields. He suggested that this model should be taken into consideration.

A delegate of BURKINA FASO asked if a problem of literacy has been a problem in education about IPM and what is the threshold for the decision for the application of pesticides.

Dr. Mancini replied that all factors are considered during the educational process and threshold for the decision on application of pesticides depends on conditions in the field. Her report is a statement of the meeting.

The CHAIR introduced Dr. Jason Clay of the World Wildlife Fund (WWF) to present a report on Cumulative Environmental Impacts of Cotton Production. Mr. Clay reported that key environmental impacts of agriculture on production include: 55% of habitat loss, water overuses and wastes, loss of soil, excessive use of agrochemicals, pollution and climate change. He indicated that food demand will double in 50 years and increased income will lead to higher consumption, while per capita arable land is decreasing. Dr. Clay noted several issues in the current market context, which include: consumer interest in product residues and testing, proliferation of certification programs and increasing role of retailers and NGO's as watchdogs. He suggested that in order to reduce impacts of agriculture on environments it is necessary to focus on just several key impacts, to focus on producers that do a better job, to focus on results and on key buyers that make decisions for millions of consumers. Dr. Clay said that commodity Roundtables could make production more sustainable if they include a broad range of stakeholders, identify key impacts, agree on realistic standards that reduce impacts and support research. He mentioned that goals for better cotton production should include an increase in on-farm habitat, improved water efficiency, reduced pesticide toxicity, reduced energy use, improved soil health and increased soil carbon, elimination of child labor, improved yield and quality and farmer income. Dr. Clay described the benefits of reclaiming degraded land in Brazil by increasing soil carbon. He noted that pesticides and toxicity represent a major environmental risk and that 7-12% of all pesticides and 20-25% of all insecticides glob-

ally are used on cotton. Dr. Clay described trends that will affect cotton production including cost of synthetics, oil prices and cost of inputs (water, fertilizer, pesticides, transportation costs, displacement by other crops, crop rotations and availability of sufficient capital. He called on a faster implementation of modern crop management practices in the information age.

A delegate of UK asked: given the small profit margin to Asian cotton growers and the relatively high cost of the Farm Field Schools compared with the LEC in West Africa, or the Insecticide Resistance Management Program in India, how the FFS could be economically feasible across the 20 million growers in Asia?

Dr. Mancini replied that the cost of the FFS is high, but cost/ benefit for all aspects of the evaluation should be done which could make the system reasonable. She pointed out that farmer-to-farmer education and school self-financing could be used to reduce the cost. However the high cost of the program remains a concern.

A delegate of the USA asked where does the WWF stands on the use of biotechnology as a part of the solution to the very important environmental issue.

Dr. Clay replied that the WWF is technology neutral and that data on Bt cotton use and IPM data should drive discussion in the Roundtables. His presentation is a statement of the meeting.

The CHAIR introduced Mr. Graham Burden of Marks and Spencer to present a report on a Retailer's Perspective on Building Demand for Cotton Through Better Cotton Production Practices. Mr. Graham described Marks and Spencer as a clothing, food and financial services retailer with a turnover of 8 million British pounds, over 300 UK stores, trade in 30 countries and 10 million customers a week. He noted that Marks and Spencer brand values include quality, value, service, innovation and trust. Mr. Burden pointed that the ITMF contamination survey of 2005, indicated that contamination affected 22% of evaluated cotton with most contaminated cotton from India, Turkey and Central Asia and the least contaminated from Australia and USA. He noted that M&S yarn specs state "contamination not acceptable in garment form". Mr. Burden said that innovation is an opportunity for growth, and key drivers of innovation are performance, well-being, environment, social and lifestyle influences. He described a range of products made from Pima cotton as luxurious and durable merchandise. Mr. Burden described trust issues in clothing as a confidence that sellers will meet customer's expectations, and customers would like to know the way clothes are made, conditions in the factories and the use of chemicals in their manufacture. He presented facts on Fairtrade campaign for cotton, which was launched in March 2006, and examples of Fairtrade labeled products include t-shirts, socks, underwear and organic cotton for baby wear

from India. Mr. Burden noted that cotton fabric for M&S is sourced worldwide and accounts for 55% of its total and 60,000 tons of fiber. He mentioned that external pressure groups include Soil Association, Friends of the Earth, Labor Behind the Label, Pesticide Action Network, World Wildlife Foundation and Environmental Justice Foundation. Mr. Burden described strategy options for retailers are to support the best, to help the rest to improve and to avoid the worst. He noted that cotton merchants and traders play a key role in trust issues and there are opportunities if retailers will work closer with them. Mr. Burden informed that M&S provides leadership on a new issue – not claiming perfection on all cotton it sells, but everything sold

meets the best standard on the high street – GSP, ECOP, RFID and animal welfare, and powerful external advocates include Fairtrade Foundation and Oxfam. He concluded saying that M&S is a mass retailer, buys by specification – quality comes first”, “look behind the label”, and have standards such as Fairtrade cotton seed, organic EU2092/91.

The CHAIR observed that the raw cotton price received by producer seem not to justify high retail prices for garments sold in stores and asked where the difference in prices go.

Mr. Burden replied that M&S has a policy of the same margin or less for new products such as Fairtrade cotton and it if the Faircotton item costs 8 British pounds compared with a not

certified item priced at 7 British pounds, the producer receives 24 percent of the difference in the price.

A delegate of BRAZIL asked about M&S standing on the content of Bt cotton in garments sold.

Mr. Burden replied that about 30% of world cotton production is Bt cotton and it is assumed that about the same amount of Bt cotton is contained in the garments sold in stores. He noted that improper use of the technology could cause some concern. His presentation is a statement of the meeting.

The CHAIR adjourned the meeting at 14:45 hrs.

Second Open Session

Cotton Production: Efficiency and Social Implications

15:00 hr. Monday, September 11, 2006

Mr. João Carlos Jacobsen Rodrigues in the Chair

The CHAIR called the meeting to order and introduced Mr. Alastair Usher, from Ergon Associates, United Kingdom, to present a paper on the social and labor impacts of cotton production. Mr. Usher said that the central issue of social and labor impacts on cotton production deals with a paradox, whereby it is recognized that cotton is an engine of rural economic development, but that it also has a social impact. He noted that the aim is to find a way to address economic development with the least social impact. Any response has to take into account the scale of production operations, as it uses labor in different ways and thus has different impacts, and labor standards. He suggested that the key impacts of cotton production were health and safety, indebtedness, workers and producer's organization, gender, child labor, and coercive labor practices. In reference to health and safety, Mr. Usher said that the main risks were exposure of workers to toxins, with particular vulnerability of children, and working conditions in gins, and that an appropriate response would include information and training on the use of inputs, the use of better management practices, and the provision of drinking water for workers. In reference to indebtedness, he said that the options for credit are limited and result in higher credit costs, which in turn might lead to a form of labor bondage as debt accumulates. Often weak organization of producers leads to a lack of group negotiation for credit. He mentioned that environmental initiatives to reduce the use of input requirements lower the need for credit and that micro finance has been successfully used to increase economic independence, in addition to properly addressing other social issues. In reference to worker and producer organization,

he said that informal work in plantation-type operations is a major social and labor challenge and that the only response is to formalize work. He added that in smallholder structures, capacity building and the development of producer organizations could aid in addressing social impacts. In reference to gender, he mentioned that women often work as unpaid family labor or day laborers, have difficulties gaining access to credit, and are left out of the decision-making process; in response, micro-finance has proven successful in addressing these issues, and information and awareness on toxicity and appropriate use and the advantages of using less-toxic material can address the dangers for women of exposure to toxic materials. In reference to child labor, Mr. Usher noted that there are different laws in reference to the kind of work and the appropriate age of children in the work place, but that in general it could be expected that work performed by children should not interfere with education or health, but that child labor is difficult to access and monitor as it is virtually informal. He added that information and training are key to achieving good practices in terms of child labor that micro-finance was successfully used to eliminate child labor in tobacco and it can be used in cotton, and that efforts should be done in consultation with specific experts in the United Nations. Finally Mr. Usher said that forced labor is a violation of a fundamental human right that occurs through the use of intermediaries, recruitment agencies, social exclusion, lack of information, labor migration, inequitable loan or credit, and in-kind remuneration. His presentation is a statement of the meeting.

The CHAIR introduced Mr. Rodolfo Tavares, of the Brazilian Commission of Labor Affairs of the National Agricultural Federation to present a paper on the labor law in rural markets. Mr. Tavares said that out of 17.7 million economi-

cally active rural workers in Brazil, 4.9 million were employed, of which 1.6 had formal work and 3.3 informal work. He added that 28 billion Reais were spent in rural social benefits and that the amount would increase to 34 billion if the unemployed were added. Mr. Tavares explained that Brazilian rural labor law included 922 articles, but that if additional decrees were added total articles would be 1265. He mentioned that there were 31 articles referring to health and safety and that the issue of health and safety was very strict, dealing with health, hazards and accidents. He added that the law contemplated the living quarters for temporary workers and that it grants to workers the use of the same equipment utilized by the army in similar conditions. Mr. Tavares said that Brazil is a signatory of convention 184 of the International Labor Organization and that a recent World Bank study of labor law in 155 countries found that Brazil imposes the highest fines to a breach of labor laws and allows the least flexibility. Finally, Mr. Tavares said that Brazil was the first country to recognize contemporary forms of slavery, but that as any civilized country it also believes that due process is of utmost importance. His presentation is a statement of the meeting.

The CHAIR introduced Mr. Sudripta Roy, of the Ministry of Textiles, India, to present a paper on the social impact of cotton production and use in India. Mr. Roy said that India has a strong cotton base with 58% share of the fiber market, 60 million people connected to cotton, the world's largest area dedicated to the production of the fiber, considerable textile activity with 37 million spindles. Given the dimensions of the production and use sectors, the environmental and social impacts could be larger than in any other country. He added that the government of India has taken various steps to ensure that the cotton industry is in harmony with nature and society. In reference

to integrated pest management, he said that it is promoted through a technology mission and a cotton improvement project, resulting in lower use of pesticides in recent years. He also said that a new hope for a clean environment is the use of biotech cotton, with which 4 million hectares are to be planted in 2006/07. He said that elaborate tests ensure no adverse effects from the use of Bt hybrids in the soil microflora, earthworms and other organisms. Another practice that has an impact on the environment in India is organic cotton production, as it does not use chemical fertilizers or pesticides. Environmental protection also covers the textile industry and there is consideration of safety on processing and textile products themselves. However, there are difficulties in ensuring compliance with regulations in the informal sector as it is spread in small units of production. In reference to the social impact Mr. Roy said that women play a mayor role in many operations in cotton production including field cleaning, sowing, application of fertilizers and pesticides, weeding and harvesting. Women also play a crucial role in emasculation and pollination of hybrid seed production and in ginning. Finally, Mr. Roy said that the social security of farmers is now more vulnerable as farm income has declined due to lower prices of cotton and higher prices of inputs, and that there is a need to reverse this situation. In response, the government of India promotes contract farming, involving farmers, textile mills and input suppliers. His report is a statement of the meeting.

The CHAIR opened the floor for questions and comments, and the delegate of BRAZIL asked that the ICAC prepare a paper or establish a panel or task force to compare labor laws in cotton producing countries with the aim to work toward global standardization of labor laws.

In response to a questions by the delegate of BURKINA FASO, Mr. Roy said that the rights of hybrid Bt cotton are shared by several com-

panies, that the introduction of Bt cotton in India has increased yields, and that despite the increases in yields, limits are recognized for yield increases in the future.

In response to questions from the delegates of PAKISTAN and Sudan Mr. Roy said that 50% of cotton production is not irrigated in India and water contamination is limited, that normally there are one or two sprays in Bt cotton fields, and that yields have doubled and tripled in some cases. Contamination in Indian cotton was a problem in the past, but with the modernization of gins contaminations is now nil.

The CHAIR introduced Mr. Reiner de Man of Sustainable Business Development, The Netherlands, to present a paper on production and use of sustainable cotton. Mr. de Man said that sustainability of cotton is of growing importance and with the potential to have a strong impact on the cotton and textile industry. Sustainability of cotton is increasingly used in textile companies in order to improve corporate reputation, showing commitment to social and environmental sustainability. He said that cotton production is intrinsically linked to serious ecological and social problems, such as intensive use of chemicals, use of large quantities of water leading to degradation of water sources, soil degradation, loss of biodiversity, link between cotton cultivation poverty and debt, human rights and gender issues. As a result there is a need for a minimum standard of sustainable production in order to exclude the unacceptable. A standard would be a condition to be a market participant, and the definition should involve international organizations and international law. However, private businesses in their own interest can develop a minimum standard for cotton production motivated by corporate social responsibility. In fact many retailers have started to create a more transparent supply chain and to set ecological and social standards for their suppliers. This response by companies is not the

result of charity efforts or ethical grounds, but rather to lower or eliminate the risk of damage to brands, company reputation or market share. In order to be viable, sustainability must cover at least the farmer and the retailer. With respect to the farmer, environmental improvement is one element that must be followed by better income and social conditions for farmers. With respect to the retailer, supply chain security, brand reputation, and premium market are sufficient incentives. Along these lines three projects are already being implemented, the BioRe India/COOP Switzerland, which is the biggest organic cotton project in the world, the Cotton Made in Africa/Otto Group, aims to marketing cotton products made of African cotton, and the WWF/IKEA/Bahawalpur project that introduces Better Management Practices in Pakistan along with sustainable environmental and social elements. In summary, Mr. de Man said that the cotton sector should agree to a minimum sustainability standard before 2010, that the Better Cotton Initiative initiated by the World Wild Fund is the only credible starting point, that the private sector should take the initiative, with major retailers implementing the standard, and that niche markets are an important source of innovation but will not create a solution. His report is a statement of the meeting.

The CHAIR opened the floor for questions and in response to a question by the delegate of India, Mr. de Man said that any initiative should be lead by the demand side of the market that the farmer cannot implement any sustainable program if there is no signal from the market. In response to a question by the delegate of Pakistan, Mr. de Man said that a new set of standards is needed to define cotton in terms of a specific factor such as organic production and other methods of production. In response to a question by the delegate of Brazil, Mr. de Man said that organic cotton would fetch higher prices because the buyer wants a specific cotton, and is willing to pay more for it.

Third Open Session

Outlook for Cotton Supply and Use

9:00 hr. Tuesday September 12, 2006
Mr. Pedro Carmargo Neto in the Chair

The CHAIR introduced Mrs. Armelle Gruère, Statistician, ICAC Secretariat to present a report on the Outlook for Cotton Supply and Use. Mrs. Gruère reported that world end-use cotton consumption increased in 2005 for the seventh consecutive year, and cotton was the main driver of the 3.6% expansion of the world textile market, which cotton shares with all other textile fibers (in particular with chemical fibers and wool). She noted that as a result of the increased competitiveness of cotton products, the market share of cotton in end-use textile

products increased by 1.6 percentage points in 2005. Mrs. Gruère indicated that processing of cotton is increasingly concentrated in a few large Asian developing countries: principally China (Mainland), but also India and Pakistan, to the detriment of industrial countries and some other developing countries. She said that growth in world cotton production and the extraordinary expansion in mill consumption in recent years have gone hand in hand. Mrs. Gruère noted that cotton production has expanded in the three largest processing countries; nevertheless local production has lagged behind booming domestic mill consumption in China (Mainland), and

therefore China (Mainland) has relied more and more on imports, boosting world trade to new records. She projected that as world cotton mill consumption is forecast to increase by 3% in 2006/07 but world cotton production may remain almost stable, world cotton stocks could decline significantly. Mrs. Gruère concluded that expected large cotton imports and declining world stocks should support international cotton prices in 2006/07. *The Outlook for Cotton Supply and Use* is a document of the meeting.

The CHAIR introduced Mr. Antonio Vidal Esteve, President, Ecom Cotton Mercosur, to present a report on the Outlook for Cotton Sup-

ply and Use. Mr. Esteve presented a comparison and averages of world supply and use estimates by the ICAC and USDA, with world ending stocks estimates by USDA exceeding the ICAC estimates for 2005/06 by 580,000 tons, while the USDA estimate for China (Mainland) ending stocks in 2005/06 exceeds the ICAC estimate by 1.3 million tons. He compared average estimates by ICAC and USDA for ending stocks in China (Mainland) in 2005/06 with anecdotal evidence of stocks observed at the end of July 2006 as a result of interviewing mills, traders, exchanges, port authorities and brokers in China (Mainland). Mr. Esteve indicated that the anecdotal evidence suggests that 2005/06 ending stocks include 1.3 million tons of reserve stocks, 70,000 tons of stocks at CNZE/CNCE, 1 million tons of stocks held by the trade, 1.53 million tons at mills, and 500,000 tons on consignment, totaling 4.4 million tons, exceeding the average estimate by ICAC/USDA by 2.15 million tons. He presented results of a theoretical exercise of adjusting for the difference by adding 215,000 tons to production and deducting 215,000 tons from consumption in China (Mainland) during the past 5 years. Mr. Esteve presented adjusted estimates of supply and use in China (Mainland) in the world for 2005/06 and 2006/07, resulting in a doubling of the stocks to use ratio in China (Mainland) compared with the average ICAC/USDA estimates. He noted that the exercise would result in an increase of world stocks to use ratio from 44.5% to 53.6% in 2005/06 and from 39.1% to 49.5% in 2006/07. He concluded that this is a theoretical exercise, but until the market figures out what is the real situation in China (Mainland), the rest of the analysis is secondary. Mr. Esteve called on the ICAC to solve the mystery. His presentation is a statement of the meeting.

A delegate of INDIA stated that despite of a 10% increase in cotton production in India to a record high, exports of cotton are expected to decline because of increasing domestic demand, lower stocks and the government's policy to encourage exports of value added products, like garments.

The Secretary General asked Mr. Esteve to clarify if the exercise of estimating anecdotal stocks was done in earlier years and to explain how exactly the estimate was made.

Mr. Esteve explained that the exercise was done this year for the first time as a result of visiting and questioning spinning mills, trading companies shipping organizations, ginning mills and other participants of the market.

A delegate of TURKEY asked if there were discussions between the USDA and the ICAC regarding a significant difference in the estimated stocks in China (Mainland).

Mrs. Gruère replied that we are aware of the difference and have discussed the issue with the USDA. She said that the reason for difference is

the recent revision by the USDA of the stocks' estimates in China (Mainland). The ICAC Secretariat continues to estimate stocks in China (Mainland) as a residual of supply and use.

A delegate of TURKEY asked for a comment on the issue from a delegate of the USA.

A delegate of USA pointed to a difficulty in obtaining correct statistics from China (Mainland), but the USDA is making a constant effort to evaluate and review data from all sources through the lock-up procedure and current estimates reflect the result of these efforts.

A delegate of COLOMBIA suggested the need to consider the impact of subsidies, estimated at 15-20%, on international prices in order to improve price projections.

A delegate of CHAD referred to the report of the Executive Director indicating that the ICAC Secretariat suspended price forecasting due to inaccuracy of the price model last year. He suggested using the impact of subsidies as one of the variables in the price model to improve its accuracy.

Mrs. Gruère indicated that the main variables in the price model are net trade by China (Mainland) and the level of stocks in the rest of the world. She noted that last year a substantial increase in net imports by China (Mainland) did not lead to actual increase in international prices.

A delegate of the EU asked, given the fact that the ICAC price model does not provide accurate projection and is being re-evaluated, what other factors beside the stock-to-use ratio and net imports by China (Mainland) are being considered.

The Secretary General explained that the model takes into account supply, demand, trade, and subsidies affect the level of production and are not a separate variable. He noted that the model was quite accurate until last year, at this time the reason for the inaccuracy is being evaluated, and one year of data is not enough to arrive at a correct conclusion on the fundamental change, obviously occurring in the market.

A delegate of TANZANIA suggested increasing efforts in bringing China (Mainland) into the ICAC fraternity.

A delegate of CHAD suggested that the ICAC should integrate a variable for the impact of subsidies into the price model and compare the results with the existing model.

The CHAIR introduced Mr. Ray Butler, Editor of Cotton Outlook to present a report on the outlook for China Cotton Supply and Use. Mr. Butler reported that this cotton year area in China (Mainland) is estimated at about 80 million mu or 5.33 million hectares, representing an increase of 5.3% compared with 2005 and a third more than in 2000/01. He noted that the room for further expansion of cotton area is limited owing

to constraints resulting from urbanization and the government's emphasis on the production of feed grains. The priority is therefore placed on improving yields. Mr. Butler indicated that in 2005/06 60% of planted cotton were Bt varieties, consisting predominantly of domestically produced strains, designed to combat bollworm. No Bt varieties were planted in Xingjian, which this year for the first time will produce in excess of 2 million tons, accounting for one third of this year's projected national output of 6 – 6.3 million tons. He noted that China (Mainland) is the world's largest producer and consumer of cotton. Estimated consumption in 2005/06 was 10 million tons and an increase is projected of 10% in 2006/07. Mr. Butler cautioned that the statistics for production and consumption in China (Mainland) are tinged with doubt. The USDA acknowledges that there is a discrepancy in the numbers and adds back an element of unaccounted stock. There appears, furthermore, to be increasing recognition in China that the production and consumption data lack coherency. He noted that of the topic of greatest interest to the market is the extent of the increase in consumption, and given a continued shortfall in production, a continuation of imports on a massive scale should be expected. Mr. Butler indicated that in 2005/06 imports by China (Mainland) reached 4.2 million tons and are projected to reach 4.5 million tons in 2006/07. He listed issues that are pertinent to any discussion of cotton in China (Mainland), including quotas, quota rates of duty, interest rates, bank lending practices, use of strategic reserves and timing of quota release. Mr. Butler quoted Lu Feng, a professor at Beijing University, who said at a recent domestic forum that from a strictly economic viewpoint quotas are not the best means of meeting the market requirements, that it would be preferable to protect farmers' interests by other means and leave the market to operate, which would serve the better economic interests of the textile industry. He noted that the China Cotton Association has issued a set of revised trading rules after consulting with international and domestic parties. The contract allows for the use of ICA rules for technical arbitration. His report is a statement of the meeting.

The CHAIR introduced Mr. Vinay Kotak to present a report on the Outlook for Cotton Supply and Use in India. Mr. Kotak reported that Indian cotton supply and use experiences radical transformation. He estimated that in 2006/07 Indian planted area would increase by 4% and reach 9.2 million hectares, the largest area accounting for 25% of the world plantings and reaching a saturation level. Mr. Kotak projected that extra-long staple cotton area in India will increase from 200,000 hectares in 2006/07 to 375,000 hectares in 2007/08. He indicated that in 2006/07, cotton production is expected to increase by 11% to a record 27.5 million (170 kg) bales, while in 2007/08 and subsequent years production is expected to grow at rates of 7-8%, subject to nor-

mal weather conditions. Mr. Kotak underlined a change in the production profile representing a shift from short to medium and long staple cotton. He reported that production increases are accruing because of rising productivity and yields, which are projected to reach 508 kg per hectare in 2006/07. Mr. Kotak said that in 2006/07 irrigated area accounts for 35% of the total and is projected to continue rising by 3% during subsequent years, while Bt cotton is estimated to account for 55% of area, including 35% of authorized plantings, and projected to reach 80% by year 2010. He projected that during the next three seasons yields will be rising by 7-9% annually, and a major focus will be placed on raising yields in Maharashtra. Mr. Kotak noted that Punjab (North Zone), Gujarat, Maharashtra (Central Zone) and Andhra Pradesh (South Zone) are the four states accounting for 75% of the cotton area and 78% of production in India. He explained that annual increases in domestic consumption by 1.5-2 million (170 kg) bales are caused by GDP and income growth, burgeoning middle class preferring cotton as a fashion fabric, and he noted that the domestic market for textiles rose from \$25 billion in 2002/03 to \$45 billion in 2006/07. Mr. Kotak highlighted that India has the second largest number of spindles in the world, adding 1.5 million annually, has the largest number of looms, and cotton accounts for 65% of Indian mill use, versus 40% in the world. He explained that the stocks to use ratio in India is declining due to rising consumption and exports and declining imports, while imports of extra-fine cotton will continue due to a demand/supply gap. Mr. Kotak said that import demand for Indian cotton is rising because roller ginned Indian cotton provides good fiber value and productivity, modern ginning mills deliver better graded and less contaminated cotton. India has a logistic advantage for deliveries to Asia, and it has desirable properties of Shankar-6. He concluded that the outlook for Indian cotton is robust and will be driven by sustained domestic demand, greater exportability, increasing popularity and cotton will always remain the culture and heritage of India. His presentation is a statement of the meeting.

A delegate of PAKISTAN asked what economic measures are taken in India to overcome contamination issue and what is the spindle capacity in India.

Mr. Kotak answered that the technology mission undertaken by the government to modernize more than 800 ginning mills and to eliminate contamination is bringing positive results. He noted that 1.5-2 million spindles are added annually in India and by 2010 cotton use is projected to reach 35 million (170 kg) bales.

A delegate of UZBEKISTAN asked to clarify if Indian exports are projected to increase or decline.

Mr. Kotak replied that it would depend on the situation with supply and demand.

A delegate of PAKISTAN said that Bt cotton in India is estimated at 55% of the total and asked if there is room for further expansion.

Mr. Kotak said that Bt cotton is expected to increase to 80% by 2010.

A delegate of EGYPT asked if yields of Bt cotton are higher than of the conventional varieties.

Mr. Kotak replied that yields are higher.

The CHAIR introduced Mr. Nikos Karagiorgos, of Cotton Ginning & Oil Factory, Greece to present an Outlook on Greek Supply and Use under the New CAP Regime. Mr. Karagiorgos reported that Greece is an important cotton country, the eighth world producer and the fifth world exporter, accounting for 400,000 tons of production, 320,000 tons of exports and 80,000 of mill use in 2005/06. He projected that in 2006/07, planted area is expected to increase, but because of the expected decline in yields production will remain unchanged. Mr. Karagiorgos noted that 100% of cotton is irrigated, machine picked and HVI tested by 70,000 cotton farmers. He indicated that this year a major change in the EU cotton subsidy program was implemented, whereas 35% of support will continue to be based on the area, while 65% will be provided as a single farm payment. He noted that farmers have an obligation to plant cotton and maintain farms, but have no obligation to harvest. Mr. Karagiorgos explained that the expected decline in harvested area as a consequence of the reform did not happen, because a long history of traditional cotton farming, large previous investments in farming and ginning equipment and because it was a first year of reform and farmers wanted to test the new system. He noted that cotton still provides the best income for farmers compared with grain, oilseeds and other crops. Mr. Karagiorgos said that there is a program of Integrated Management in Agriculture providing consultation to farmers on improving yields, quality and reducing costs. He indicated negative effects of the reform that include reduced expenditures by farmers on inputs, seeds and fertilizers and as a result expected lower yields. His report is a statement of the meeting.

The CHAIR introduced Mr. Boubacar Diagne, of the Compagnie Malienne pour le Développement des Fibres Textiles (CMDT), to present an outlook for supply and use in Mali. Mr. Diagne reported that Mali is one of the largest cotton producers in Africa, and cotton production plays an essential economic role for this country. He said that the CMDT is the Malian state cotton company, with 60% owned by the Malian government and 40% by DAGRIS. Mr. Diagne noted that Malian cotton production has been relatively stable in recent seasons, ranging between

200,000 and 250,000 tons. However, increases in input prices in recent years have affected average yields. He indicated that in the last two seasons, efforts were made to improve the quality of cotton fiber. Mr. Diagne said that domestic mill use, suffering from competition from Asian textile imports as well as counterfeited local brands, has ranged between 800 and 3,000 tons in recent seasons, and as a result, Mali exports most of its cotton production. He observed that the Malian cotton industry is directly affected by the decline in international cotton prices and the strengthening of the exchange rate of the euro in relation to the dollar. Mr. Diagne informed that the forthcoming privatization of the CMDT in 2008 will be an important event and will be preceded by a complete reorganization of the Malian cotton sector. He noted that the privatization and the intensification of cotton production represent two future challenges for the Malian cotton industry. Mr. Diagne said that since the beginning of the twentieth century Mali has developed policies to encourage domestic cotton processing. Mr. Diagne reiterated Mali's call to end all forms of cotton subventions in the world. His report is a statement of the meeting.

A delegate of BRAZIL suggested that if a Greek farmer cannot cover his costs without subsidies, might it be helpful to push the EU to allow the use of Bt cotton so as to reduce costs.

Mr. Karagiorgos replied that he does not agree that this is right, and thinks that the fact that Greece does not produce Bt cotton in advantageous and brings customers to the Greek market.

A delegate of CHAD asked about expected consequences of a recent decision of the European Court putting in doubt the new system of support for European farmers.

Mr. Karagiorgos answered that it is too early to evaluate the effects of this decision and he is not in a position to suggest consequences.

A delegate of COTE D'IVOIRE asked if the planned privatization in Mali coinciding with low market prices could lead to negative results in terms of income received by farmers.

Mr. Diagne replied that the current market situation creates uncertainties, is a factor and will be carefully evaluated before the process of privatization is launched.

A delegate of GREECE stated that cotton production in the EU accounts for a very small share of world cotton production and has very limited effect on international prices. She suggested that instead of focusing discussions on support programs in the EU, we should focus on the way to reduce the cost of production and how to increase incomes of producers.

The CHAIR adjourned the session at 11:00 hrs.

Fourth Open Session

Commercial Standardization of Instrument Testing of Cotton (CSITC)

11:30 hr. Tuesday September 12, 2006

Mr. Andrew Macdonald in the Chair

The SECRETARY GENERAL called the meeting to order and introduced the CHAIR. The CHAIR introduced the panel members and welcomed all participants to the meeting. He hoped that the panel discussion will provide an excellent opportunity for extensive discussion, and all delegates will be able to express their feelings freely. The CHAIR stated that the Expert Panel on the Commercial Standardization of Instrument Testing of Cotton (CSITC) was formed in December 2003 and later was named as a Task Force. He said that there is a consensus that instrument testing is superior to traditional hand classing of cotton. The goal of the Task Force is the adoption of instrument testing standards and procedures world wide similar to the USDA and to introduce the use of instrument testing language in the trading of cotton so that traditional description of grades and types are replaced with instrument test values. The Task Force represents importers, exporters and all other segments of the world cotton industry.

Referring to the meeting of the Task Force on Sunday September 9, 2006, the CHAIR said that the second Pilot Round test involving 46 laboratories was extremely gratifying with consistency among laboratories. Each laboratory will receive an evaluation of their results that will not be made public. The results showed high variation but this is a start to bring confidence into the system by providing guidance to laboratories that performed below the average. The CHAIR added that such diagnostics and assistance would go along to improve consistency in future results. There is a need to add more laboratories to the Round Trials. The Task Force recommended that a nominal fee of US\$75 should be charged to cover the cost of dispatching the samples for testing. The CHAIR added that it is not possible to subsidize the program forever.

The Task Force also discussed the question of including a 5th cotton from some other country in order to ensure that variations are consistent and independent of the origin of cotton. The global objective of the work of the Task Force is worldwide acceptance and reliable instrument-based cotton quality assessment having defined test rules and being based on worldwide cotton testing laboratory evaluation system. The CSITC program has assisted to secure a CFC project, which is also funded by EU. The project will establish two testing labs in Africa and train people to produce reliable test results. The CHAIR thanked the ICAC Secretariat for enormous support given to the work of the Task Force on CSITC. His report is a statement of the meeting.

Answering a question from the CHAIR regarding worldwide acceptance of instrument testing, CSITC panel member Mr. Ralph Schulze of AUSTRALIA stated that it is a great window of opportunity for cotton importing and exporting countries to standardize instrument testing. There is a need that instrument testing in the world must proceed in a timely fashion. Popularization of instruments is an incentive for countries to make use of machine testing of cotton.

The CHAIR asked Mr. Hans-Joerg Ruckriem of BRAZIL how he sees the work of CSITC in the light of more and more sophistication being introduced in textile spinning. Mr. Ruckriem replied that Brazil started using U.S. Standards in 2003, and instrument testing has been happily accepted by the Brazilian industry. He hoped that the work of CSITC will unify labs across regions, and worldwide and producers must benefit from this development.

A panel member Dr. Joe Kabissa of TANZANIA stated that his country supports the work of the CSITC. However, he foresees certain problems. There is only one major manufacturer of rapid testing instruments. The instruments have high costs. Many measurements are not used in trading of cotton, and some characters are still not measured perfectly. He stated that Tanzania is looking forward to participation in the Round Trials.

The CHAIR asked panel member, Mrs. Jolly Sabune of UGANDA, if the CSITC project results were applicable in Africa. Mrs. Sabune stated that the project is good, but her views are not much different from Dr. Kabissa as far as concerns are related. She saw no place for a premium based on hand picking and roller ginning of cotton in instrument testing.

The CHAIR asked panel member Dr. Jean-Paul Gourlot of CIRAD-CA, France, if the results were not too sophisticated for application in West Africa. Dr. Gourlot replied that there is nothing complicated to comply with requirements for instrument testing. The basic idea is to get reliable results. He made mention of the two Regional Testing Centers to be established under the CFC-EU funded project, one each in East and West Africa. The Regional Testing Centers will transfer knowledge in the region that will benefit producers, ginners and merchants in many countries.

Panelist Mr. Bertrand Gayet of PARAGUAY stated that his country adopted HVI classing three years ago and almost 60% of total production is tested on three HVI machines. Machine tested fiber quality data helps to offer better quality cotton.

The CHAIR opened the floor for discussion, and the delegate of PAKISTAN complimented the idea of CSITC and stated that more than one manufacturer of HVI type machines complicates the issue. He added that high cost of HVI machines is prohibiting developing countries to adopt instrument testing on a full scale. He asked if something was being done to lower the cost of HVI machines.

The delegate of SUDAN congratulated the chair on the excellent work of the CSITC and stated that Sudan is gradually adopting HVI classification over the last 5-6 years. However, a HVI machine requires repair every 1-2 years, which is very expensive.

The CHAIR responded that adoption of instrument testing and bringing harmony among fiber testing labs is a long-term process. Referring to the question on multiple manufacturers, the CHAIR said that the objective is not to differentiate among machines but achieve accurate results. The tests so far have confirmed that such accuracy can be achieved.

Responding to a question from the delegate of EGYPT, Mr. Schulze emphasized the importance of conditioning and maintaining proper humidity and temperature in testing labs. He added that strength is influenced by moisture, which results in lower repeatability and variation among labs.

The delegate of CHAD stated that a number of developing countries showed concerns at the 64th Plenary Meeting in Liverpool, UK but those concerns have not been addressed. He regretted that CSITC is rushing to implement the project without taking into account the issues raised in Liverpool. The delegated stated that cost of the machine is prohibitive but they do not want to lag behind rest of the world in adopting the system. He suggested going slow so that developing countries could adjust their systems accordingly.

The CHAIR stated that there is no urgency to adopt the system but this is the way forward and countries must expedite to take benefit of accurate fiber testing. Regarding the high price, the CHAIR said that ICAC Secretariat had some discussions with the machine manufacturer, which may prove helpful.

The delegate of INDIA welcomed the work of the CSITC and referred to the problems related to roller ginning and growing conditions. Machine testing will not differentiate such cottons. He stated that something must be done about the high cost of machines.

Panelist Mr. Ruckriem stated that Brazil is getting used to HVI data, and merchants do provide

HVI data to buyers who request such a data.

On a question raised by the CHAIR about how he sees the project going forward and the future agenda for the CSITC, Mr. Schulze stated that 2007 will be a trial year for the CSITC Round Trials. He predicted some variability in the data but encouraged maximum participation in Round Trials. He predicted the system will become a worldwide system that will benefit all segments of the industry.

The CHAIR mentioned that as a spinner while using cotton he would base 50% of his purchase decision on the origin of cotton while the HVI data will be used to fine tune the machinery in use. He mentioned in good humor, that Brazil produce better cotton than Australia but Australian cotton is sold at 15% higher price because it is processed and tested better than Brazilian cotton, and this is what CSITC is trying to correct.

The president of the International Cotton Association also supported the work of the CSITC

and wished that more and more cotton was traded on uniform conditions. He mentioned that arbitration is usually categorized into “quality arbitration” referring to fiber quality parameters and “technical arbitration” which referred to documentation of the purchase/sale deal. He remarked that the world trend shows that some technical arbitration issues are going to be moved to quality arbitration.

Mr. Axel Drieling, Project Manager of the CFC-EU-ICAC project, from Germany stated that the project has two major benefits; there will be global Round Trials that will provide an extensive review of testing labs, and direct support and establishment of two Regional Testing Centers. He also emphasized the need for regional Round Trials in addition to the international Round Trials.

The delegate of PAKISTAN stated that HVI couldn't measure contamination, which is very important for countries like Pakistan. He also referred to the high cost and stated that millions

of dollars are need if all production in the country is to be tested on HVI.

The CHAIR agreed that cost is high and there is a need to lower the cost of HVI machines. Regarding contamination he observed that contamination becomes apparent only during spinning and finishing, and it is difficult to identify and eliminate contamination prior to spinning.

On a question raised by the delegate of UGANDA, the CHAIR replied that the choice of standards to be used is a commercial aspect and ultimately the trade will decide commercial variances. Variation within bales and cottons will continue, but the main objective of the CSITC is that whatever data on fiber is produced, is accurate, and trade has confidence in the data.

The CHAIR adjourned the meeting at 13:05 hrs.

[The Fifth Open Session can be located under the Report of the Chair of the Committee on Cotton Production Research on page 43.]

Sixth Open Session

The Future of the South American Textile Industry

9:00 hrs, Friday September 15, 2006

Mr. Andrew Macdonald the Chair

The CHAIR introduced Mr. Rafael Cervone Netto, President, Sinditextil SP and Member of ABIT Management Board, to report on the state of the Brazilian textile industry. He first presented general socio-economic facts about South American countries, including trade data. He presented basic facts about South American textile sectors and trade. He described the main trade agreements existing in South America, including ALADI, MERCOSUR, the Andean Community of Nations, the Chilean Model (open regionalism), and ALCA, and noted their contribution to Brazilian textile trade. He also described the government program TEXBRASIL, which helps the domestic textile industry to develop. Some of the challenges facing the South American textile industry and trade are (country) individualism, anti-Americanism, and Chinese competition. He then presented a short video promoting the Brazilian textile sector.

The CHAIR opened the floor for questions. The delegate of EGYPT asked which factors and tools were used by the Brazilian government to implement its economic reform.

Mr. Netto said that access to international markets (mainly EU and US) is one of the main challenges facing Brazilian textile industry because Brazil has delayed the signing of trade agreements. Also, the Brazilian textile industry faces high interest rates and taxes.

The delegate of TANZANIA asked the number

of textile industries in Brazil. Mr. Netto answered there are 30,000 textile companies in Brazil, with total revenues of 32 billion dollars. However, most textile companies are very small. The CHAIR asked about trends in Brazilian cotton consumption.

Mr. Netto answered that per capita consumption of cotton products is only 7 kilograms, far below what could be reached.

The delegate of BRAZIL asked Mr. Netto how the Chinese competition affects the Brazilian textile industry.

Mr. Netto said that Asian textile imports have grown significantly recently, including illegal imports, which affects negatively the Brazilian textile industry.

The CHAIR thanked Mr. Netto.

The CHAIR introduced Mr. Jorge Vartparonian of Tipoti, Argentina to present a report on the Future of the South American Textile Industry. Mr. Vartparonian reported that a combination of differences of scale, widely skewed exchange rates, plus the unsymmetrical investment and export subsidies in each country of the Mercosur are sufficient to render some sectors of the Mercosur economies zero sum and unviable. He noted that unless certain safeguards measures are implemented and asymmetries corrected industries will be located in countries with the most favorable exchange rates and the largest subsidies and until recently most investments had been taking place in Brazil. Mr. Vartparonian recommended that a political decision should

be made by the 5 governments of the Mercosur countries to defend their textile value chains, especially their making up of garments, which are most at risk from China (Mainland) and Far Eastern sources, to preserve millions of jobs for the next fifteen years in cotton cultivation, ginning, spinning, knitting, weaving, printing, dyeing, cutting, sewing and trimming, together with ancillary services connected to the above. He suggested that efficient customs procedures, antidumping and anti-subsidy measures have to be implemented quickly before the Doha round starts rolling again while the competitiveness of the cotton value chain must be improved. Mr. Vartparonian noted that boll weevil has taken over the cotton fields in Brazil, Paraguay and threatening Argentina and Bolivia, and unless an intelligent regional boll weevil eradication program is carried out in these countries, the very existence of cotton will be at stake. He indicated that an issue of contamination should be solved with a strict control by provincial governments of allowing only cotton materials to be used for sacks, sewing threads and harvest belts. Mr. Vartparonian highlighted an important role of governments in improving logistics, maintaining roads, ports, customs services, establishing realistic exchange rates, providing tax and credit advantages in all Mercosur countries for investments in spinning, and ensuring that adequate investments are made to meet rising energy needs. He stated that the knitting industry has a more brilliant future in Mercosur than weaving and supported an appeal by 11 trade associations representing all segments of the U.S. fiber,

textile and apparel industries urging the WTO to establish sectoral textile negotiations within the Doha round separately from the overall non-agricultural market access negotiations. Mr. Vartparonian suggested that the Mercosur governments should keep reasonable tariffs to compensate for overvalued exchange rates and non-market subsidies that favor exports from Asia, to encourage efficiency and productivity and to strengthen customs controls to deal with circumvention, trans-shipments, dumping and counterfeiting. He favored joint ventures with European and American textile and apparel industries in South America and urged governments to stimulate and provide adequate conditions for investments, and to provide extra incentives for development. Mr. Vartparonian urged governments to find the optimum balance between the interests of consumers, workers and investors. His report is a statement of the meeting.

The CHAIR thanked Mr. Vartparonian and opened the floor for questions.

The delegate from KAZAKHSTAN thanked the Organizing Committee, the host country Brazil, and the ICAC for organizing the Plenary Meeting. He thanked again the Committee for accepting their membership to the ICAC and noted that the Kazak government supports the development of the cotton sector in Kazakhstan. He supported the idea of organizing annual workshops on trade and development at ICAC Plenary Meetings. He reiterated Kazakhstan's invitation to host one of the nearest ICAC Plenary Meetings. He noted that China is one of the leading countries in today's global economy and it would be ironic not to call it a market economy.

The delegate of ITALY noted that Europe faces the same declining trends in textile industry and hopes that it will be stressed in all the future international meetings that they need fair trade.

The CHAIR asked for the number of textile industries and the recent evolution of the cotton textile sector in Argentina.

Mr. Vartparonian said he does not know the number of textile industries; he said the Argentinean textile industry has been doing well for the last four years, following the devaluation. There are many investments in the Argentinean textile industry, including investments from Brazil. However, the textile sector in Argentina is concerned about the future and Doha Round negotiations and competition from Chinese imports. He noted that the South American textile industry needs to increase its competitiveness to be able to survive and should defend its market.

The CHAIR asked if Argentina is self-sufficient in cotton.

Mr. Vartparonian said that Argentina imports about 30,000 tons of cotton and produces about 130,000 tons of cotton a year. Argentinean cotton producers are concerned about boll weevil's spreading to their cotton fields and destroying their production as it did in some parts of Paraguay.

The CHAIR introduced Mr. Fernando Naranjo to present a report on the Future of the South American Textile industry. Mr. Naranjo reported that world exports of textiles and clothing accounts for \$765 billion, or 6% of total world exports and if South American governments support textile industry it will strengthen the region. He described textile sector in Ecuador, where textiles represent 2.4% of GDP, 24% of manufacturing, generate 25,000 direct and 100,000 indirect jobs. Mr. Naranjo noted that in Ecuador 90% of spun cotton is imported, major fibers used are cotton, polyester and acrylic fibers and major commercial partners are Andean countries, USA and the European Union. He indicated that textile and apparel exports by Ecuador reach \$90 million with 33% accounted for by apparel, 21% by fabric, 19% by yarns and filaments and 17% by home textiles, and the share of South America in textile imports by USA is 2.2% and in the EU imports of textiles – 1%. Mr. Naranjo described uncertainties for South American textiles stemming from current limited global presence, competitiveness issues, fierce global competition, mills closures, increasing imports and declining exports and sluggish economic growth. He proposed solutions to deal with these uncertainties, including the need to tap potential of the largest markets (USA, EU), investments in large scale manufacturing facilities, vertical integration, establishment of strategic alliances and partnerships along the supply chain, research and development (new products), technological modernization, development of flexible supply chains, quick response and on time deliveries. Mr. Naranjo recommended that the governments of South America assure high political and economic stability, provide support and incentives to the textile sector, open economies and attract direct foreign investments, simplify business regulations and procedures and improve infrastructure: ports, roads, electricity supply, and telecommunication. He also urged governments to modernize customs to facilitate trade procedures, to fight contraband and dumping of imported goods, to supply highly skilled textile and apparel workers, to offer flexibility in and to enforce labor and security policies

and standards. His presentation is a statement of the meeting.

The CHAIR thanked Mr. Naranjo.

The delegate from INDIA noted that India is also highly apprehensive of Chinese competition. He emphasized the huge economies of scale in the Chinese textile sector, which allows them to be competitive with cotton textile sectors in other processing countries. The Indian government is trying to create more favorable conditions for the Indian Textile industry.

The delegate from COLOMBIA thanked the speakers and made a few comments on the Colombian textile industry. She said that the textile industry plays an important economic role in Colombia. She asked how to develop value added chains from raw material to end product that can benefit the South American textile sectors.

Mr. Vartparonian said that their governments must balance priorities of their textile consumers and industries. It is impossible to decrease tariffs in textile trade and in the same time create jobs in their domestic textile industries. Governments have a high responsibility to avoid high unemployment in textile industry (he referred to the crisis in Argentina in the 1980s).

Mr. Naranjo said South American governments need to prioritize the domestic value chains and these chains should be integrated in global trade. Mr. Netto noted that illegal textile imports in Brazil are significant and affect the domestic textile industry. He also noted that integration of the value chain is a key to increase equal conditions for competition.

The delegate of PAKISTAN asked 1) what is the total fiber consumption in South America, and its share of global fiber consumption; 2) the market shares of natural and artificial fibers in South American textile consumption; and 3) what the South American textile industry has done to meet the challenges of liberalization in a post-quota regime.

The CHAIR said the third question had already been answered. Mr. Vartparonian said about 2 million tons of cotton are consumed in South America, representing about 60% of all fiber consumption; this would imply a total consumption of fibers in South America of about 3 million tons.

The CHAIR thanked the speakers and reminded that the closing session started at 11:15 hrs. He closed the session at 10:45 hrs.

Closing Session

11:15 hr. Friday September 15, 2006

Mr. Paulo Cesar da Cunha Peixoto in the Chair

The CHAIR thanked the Secretariat and the Member Governments of the ICAC for their cooperation and support for a successful 65th Plenary Meeting. He said it had been a great pleasure to serve as host.

The CHAIR noted that the Committee had accepted an invitation from the Government of Turkey to host the 66th Plenary Meeting in Izmir during 22-27 October 2007. He recognized the delegate of Turkey. The delegate of TURKEY issued a greeting to members of the ICAC on behalf of the Government of Turkey, and he thanked the Organizing Committee in Brazil for their encouragement and assistance. The delegate said that Turkey looked forward to hosting the ICAC for the third time. Turkey is the 7th largest cotton producer, the 4th largest cotton spinning country and the 2nd largest importer, and so Turkey has a rich cotton culture that will support the plenary meeting. The delegate noted that Izmir, known as the Pearl of the Aegean, is the 3rd largest city in Turkey. The city has a 5,000-year history and is rich in historical, cultural, religious and economic places of interest. The delegate said that the plenary meeting itself will take place in the heart of Izmir, and that there will be easy access to places of interest. In addition, the meeting will take place during the cotton season, affording participants an opportunity to visit production areas. The delegate said that the Government of Turkey and the private sector would ensure all arrangements for a successful plenary meeting, and he said he looks forward to seeing everyone in Izmir in 2007. A video highlighting the beauty, extensive history, diverse culture, and economic power of Turkey was shown to delegates.

The CHAIR thanked the delegate of TURKEY for the appealing presentation, and he said he was sure that the 66th Plenary Meeting would be a great success. He said that he had received valuable advice from the organizing committees for the 63rd and 64th plenary meetings in India and the UK, and he offered to help the organizers of the 66th plenary meeting in any way he could. He said that he would try to be the first person to register on-line in May 2007 when registration is opened. The CHAIR recalled that he and the executive director had worked closely during the past year to prepare for the 65th Plenary Meeting, and it had been a great pleasure to work with the Secretariat. He thanked the Secretariat for their hard work. He thanked Dr. Siphwe Mkhize for the support of the Standing Committee. He thanked all delegates for their good will and active participation, and he thanked the sponsors, exhibitors, government agencies and cotton industry participants in Brazil for their support of the meeting.

The CHAIR said that the 65th Plenary Meeting had fulfilled its objectives. He noted that the information provided in the meeting included useful guidelines for government and private sector action. He said that realistic solutions had been provided to problems faced by cotton industry participants. He noted that Brazilian agriculture is professional and that it is socially and environmentally responsible. He said that information provided during the plenary meeting indicated that biotech cotton is an important tool for sustainable production. He recalled that the Committee called for a resumption of the Doha round of multilateral trade negotiations. The CHAIR also noted that the production conference held adjacent to the plenary meeting had been an innovation in the agenda this year, and that the conference had expanded the subject matter content of the meeting to include more topics of interest to producers. In addition, the social program had provided a sampling of the rich social and cultural heritage of Brazil.

The CHAIR invited the delegate of the UNITED KINGDOM, host of the 64th Plenary Meeting, to offer closing remarks on behalf of all delegations. The delegate congratulated the Organizing Committee, the Standing Committee, the Secretariat and the Government of Brazil for an excellent, well managed, and thought provoking plenary meeting. He said he understands the difficulties of organizing a plenary meeting, but he said that hosting the ICAC is enjoyable and satisfying and allows the host country to project itself on the world cotton stage. He said that Brazil has made the most of its opportunity. He congratulated and thanked Brazil for a job well done. His remarks are a statement of the meeting.

The CHAIR said that he appreciated the kind words from the delegate of the UK, and he thanked the delegate for the support the UK had given to the Organizing Committee in Brazil.

The CHAIR asked if other delegates wished to make closing comments.

The delegate of TANZANIA thanked Brazil and the Organizing Committee for their hospitality. He commended the Secretariat for its highly professional standards and said that he plenary meeting had been highly enjoyable and successful.

The delegate of SPAIN, Ms. Elena Cores who had been elected Chair of the Standing Committee during the next year, thanked members of the Committee for supporting the election of the Standing Committee officers. She thanked Dr. Siphwe Mkhize for his work as Chair of the Standing Committee during the past year. She also thanked Mr. Bilgehan Sasmaz of Turkey who had served as Second Vice Chair, and she thanked the members of the Standing Committee who had served on the Subcommittee on

Budget and the Task Force on Membership. She welcomed Ms. Cecilia Mariniconi and Mr. Jacob Pasgo as incoming officers of the Standing Committee. She also thanked the Government and people of Brazil for their hospitality.

The delegate of COLOMBIA said that she understands what a great effort is needed to host a plenary meeting. She thanked the governments of Brazil and Goiânia, and she thanked the Chairman for his work. She noted that the delegation of Colombia included 22 members, the largest Colombian delegation in the history of the ICAC. She noted that the 65th Plenary Meeting had included so many sessions and activities that it had sometimes been difficult to keep track of all members of the delegation. She said she hoped to see everyone again next year in Turkey.

The delegate of CHINA (TAIWAN) expressed his profound appreciation to Brazil and the Organizing Committee for all their hard work. He said that the last five days had provided a wonderful opportunity for representatives of the public and private sectors from many countries to interact and cooperate. He thanked the Chair of the Standing Committee for his leadership. He thanked the Secretariat for their excellent work and professionalism. He said he looked forward to a productive year under the leadership of the new Chair of the Standing Committee, Ms. Elena Cores.

The delegate of PAKISTAN congratulated the Organizing Committee for a successful meeting with a unique theme, and he thanked Brazil for the hospitality and wonderful social program. He said that deliberations had been conducted in a professional manner, and he thanked delegates for their understanding of the concerns of all countries. He said that this had been a landmark meeting in which several important decisions had been taken. He said that Pakistan is looking forward to hosting a future plenary meeting.

The delegate of NIGERIA thanked the Organizing Committee and the Government of Brazil for hosting the meeting. He said that lessons learned during this meeting could assist Nigeria in strengthening its cotton sector. He said that low prices caused by government subsidies undermined the strength of the cotton sector. He said that the Government of Nigeria has formed a team to support cotton production, and that the textile sector of Nigeria was also important.

The delegate of the NEATHERLANDS noted that this was the first ICAC plenary meeting he had attended. He appreciated the warm welcome extended to all delegates, and he was sure that this would not be his last ICAC meeting. He noted that he is posted in a non-member country and will work to encourage that country to

join the ICAC. He expressed his thanks to the organizers of the meeting and the people of Goiânia, and he thanked the interpreters for their professional service.

The delegate of ZAMBIA joined other delegates in thanking Brazil for their hospitality. He noted that Zambia had come to the meeting as an observer but was leaving as a member. He had looked forward to the deliberations with keen interest, and he had been very satisfied with the quality of arrangements, the strength of the presentations and the environment of fellowship prevalent throughout the meeting. He said he was very satisfied that Zambia has made a correct decision to join the ICAC and that Zambia would be a committed member. He said that Zambia would be represented in Turkey. He also thanked the Secretariat for their work.

The delegate of IRAN thanked the Government and people of Brazil and the Organizing Committee for their hospitality. He thanked the

Secretariat for its work and said that the meeting had been a great success. He said that the meeting in Turkey will be a great success, and he looks forward to seeing all delegates next year in Turkey.

The delegate of UGANDA thanked all delegates for their participation. She thanked the people of Brazil and the Chairman for a successful event and the wonderful hospitality. She thanked the Secretariat for their work. She said that the delegation of Uganda benefits from participation in the ICAC and appreciates the opportunity to share experiences with other members of the world cotton fraternity. She noted that Uganda is continuing its efforts to develop the cotton industry. She thanked the Secretariat for their efforts to ensure that developing countries are aware of activities so that they can participate actively in meetings of the Committee.

The delegate of BURKINA FASO congratulated the CHAIR, the Organizing Committee,

the Government of Brazil and cotton industry participants for their hospitality. He thanked the Secretariat for its work. He congratulated the Standing Committee in Washington for its efforts on behalf of a successful meeting, and he thanked Dr. Mkhize for his leadership during the past year. He said that all delegates are aware of the need to restart the Doha round. Finally, he noted that Burkina Faso will host the 67th Plenary Meeting in 2008 and that every effort would be made to ensure a successful meeting. The delegate welcomed Zambia and Kazakhstan as new members of the ICAC.

The CHAIR observed that no other delegations wished the floor. He repeated his sincere appreciation to the delegates for their support and participation. He wished all travelers a safe and pleasant trip home, and he said he looked forward to seeing everyone in Turkey. He declared the 65th Plenary Meeting closed at 12:23hrs.

Steering Committee

17:30 hr. Thursday September 14, 2006
Mr. Siphwe Mkhize in the Chair

The CHAIR took the opportunity to thank the Organizing Committee and the Government of Brazil for their hospitality. He also thanked the Standing Committee officers and delegates for their support during the past year.

The CHAIR noted that the agenda had been distributed in advance. He asked if there were proposed changes, and seeing none found that the agenda was approved.

The CHAIR asked the Secretary General to present the nominations of officers of the Standing Committee contained in Working Paper I. The Secretary General reported that the Nominating Committee had met in May 2006 in Washington, DC and had nominated Ms. Elena Cores of Spain to serve as Chair, Ms. Cecilia Marincioni of Argentina to serve as First Vice Chair and Mr. Jacob Pasgo of Burkina Faso to serve as Second Vice Chair of the Standing Committee during the period from the end of the 65th Plenary Meeting to the end of the 66th Plenary Meeting. He reported that the Standing Committee had approved the recommendations at its 483rd Meeting, and he asked for approval of the slate of officers as nominated.

The CHAIR asked for comments on the nominations for Standing Committee officers. The delegate of BRAZIL moved that the nominations be accepted. EGYPT, CHAD and GERMANY seconded the motion of Brazil. The CHAIR found that there was a consensus to accept the

slate of officers as proposed by the Standing Committee, and he led all delegates in congratulating the new officers on their elections. Working Paper I *Election of the Standing Committee Officers* is attached.

The CHAIR asked Dr. Rafiq Chaudhry, Head Technical Information Section of the Secretariat, to present the Report of the Committee on Cotton Production Research. Dr. Chaudhry reported that the Committee on Cotton Production Research of the ICAC had organized a Technical Seminar on the topic of "Sustainability: Biotechnology and Crop Management." He summarized the report, noting that the cost of production determines the economic sustainability of cotton production in all countries. He noted that measures to reduce the cost of production include crop rotations, zero tillage, virus-resistant varieties, rationalized use of inputs, use of generic inputs and adoption of biotech cotton. He reported that the aggregate advantages of biotech cotton in Brazil are estimated at US\$284 per hectare. He summarized the results of a five-year project on sustainable control of bollworm in small-scale production systems. He also reported that the topic, "Vision for 2025" had been chosen for the topic of the 2007 Technical Seminar. Working Paper II *Topic of the 2007 Technical Seminar* is attached.

The CHAIR thanked Dr. Chaudhry for his report and asked delegates if there was approval of the report. The CHAIR found that there was a consensus to approve the report. The *Report of the Chair of the Committee on Cotton Production Research* is attached.

The CHAIR referred to the Statement of the 65th Plenary Meeting that had been prepared by the Drafting Group. He noted that copies of the Statement had been distributed, and he asked if there was a consensus to approve the report.

The delegates of BRAZIL and INDIA moved that the report be approved as distributed. Seeing that all other delegates agreed, the CHAIR found that there was a consensus to approve the Statement of the 65th Plenary Meeting.

The CHAIR asked the Secretary General to present the information Uncollected Assessments of Member Governments contained in Working Paper III. The Secretary General reported that the finances of the Secretariat had improved in recent years, but that it was important that countries continued to pay assessments in a timely fashion. He noted that two countries were more than two years in arrears, but that both have indicated a strong interest in remaining members of the Committee. He reported that ten countries are one year in arrears, and he asked those countries to fulfill their assessments as soon as practicable. He reported that 15 countries have paid their assessments in full for the current fiscal year, but that 25 countries had yet to pay their assessments for this year. He asked for the assistance of delegates in ensuring that the proper authorities are notified so as to effect timely payment.

The CHAIR thanked the Secretary General for his report.

The CHAIR asked if there were additional

business. The CHAIR found that there was no additional business, and the meeting was adjourned at 17:51 hrs.

ATTACHMENTS

Working Paper I

Election of Standing Committee Officers

Recommendation from the Standing Committee

A nominating committee met on May 5, 2006 in the Embassy of Spain to propose a slate of officers for the Standing Committee for the coming year. Delegates from Argentina, Burkina Faso, Chad, China (Taiwan), and Spain and the executive director were in attendance. Mr. Kuo Hsin (Francis) Liang of China (Taiwan) was elected Chair of the Nominating Committee.

The Rules and Regulations specify that when practicable, the First Vice Chair will be nominated to succeed the outgoing Chair and the Second Vice Chair nominated to succeed the First Vice Chair. The current First Vice Chair of the Standing Committee, Ms. Elena Cores, Attaché (Agriculture) of Spain will be able to serve as Chair during 2006-07. Accordingly, there was a consensus to nominate Ms. Elena Cores as Chair of the Standing Committee for 2006-07. However, the current Second Vice Chair, Mr. Bilgehan Sasmaz of Turkey may not be stationed in Washington for the entire term, and it was agreed that a new nomination was needed for the position of First Vice Chair.

The Rules and Regulations say that the election of officers should take into account:

1. Rotation on as broad a geographical basis as possible,
2. Adequate representation to importing and exporting countries,
3. Ability, interest and participation in the work of the Committee, and
4. Nominees must represent countries that are no more than one year in arrears at the time of the meeting of the Nominating Committee.

After consideration of these factors, the Nominating Committee agreed that Ms. Cecilia Marincioni, Trade Advisor, Embassy of Argentina should be nominated to serve as First Vice Chair. Ms. Marincioni participates actively in the meetings of the Standing Committee. A delegate from Argentina last served as an officer of the Standing Committee in 1996. Argentina is current in the payment of assessments.

The Nominating Committee agreed that Mr. Jacob Pasgo, Minister Counselor, Embassy of Burkina Faso, should be nominated for the position of Second Vice Chair. Mr. Pasgo has

attended each meeting of the Standing Committee since being assigned to Washington, and he serves as Chair of the Task Force on Membership. He expects to be stationed in Washington for three additional years. No delegate from Burkina Faso has served previously as a Standing Committee officer. Burkina Faso is current in the payment of assessments.

The proposals of the Nominating Committee were presented to the Standing Committee at the 483rd Meeting in May 2006. The Standing Committee approved the recommendations of the Nominating Committee.

Accordingly, the Standing Committee proposes the following slate of officers to the Plenary Meeting for the period from the end of the 65th Plenary Meeting in 2006 to the end of the 66th Plenary Meeting in 2007:

- Ms. Elena Cores of Spain for Chair,
- Ms. Cecilia Marincioni of Argentina for First Vice Chair, and
- Mr. Jacob Pasgo of Burkina Faso for Second Vice Chair.

Working Paper II

Topic of the 2007 Technical Seminar

The following are suggested as possible topics for the 2007 Technical Seminar:

The Vision for 2025

Cotton production has gone through drastic changes in the last three decades. Short stature varieties were vigorously developed and adopted on the lines of IRRI types and Mexican type rice and wheat varieties respectively. Short stature varieties helped to reduce crop duration and produce more uniform quality. Insecticides were adopted as an integral component of the production system. Later, countries started finding ways to reduce insecticide use. Production costs rose to unacceptable levels because of efforts to increase yields at any cost. The cotton industry became more quality conscious and adopted rapid instrument testing. Biotech cotton all together changed the plant protection system from being insecticide based to a seed-induced system. Biotechnology has many more applications that are not close to commercialization yet. The Technical Seminar in Turkey could invite papers on how cotton research and production will look in 20 years.

Lessons Learned from Pesticide Use

Cotton is a heavy consumer of insecticides, while herbicides are used more frequently and on much larger areas on corn and soybean. Pesticides were introduced for commercial use almost half a century ago, and many governments subsidized pesticides in order to promote

their use. Some of the same governments are now sponsoring projects to eliminate/reduce the use of pesticides, particularly insecticides. Insecticide use seems to have reached a peak and is in decline. Pesticides can be injurious to the environment and the long-term consequences of their use were underestimated. There are many lessons learned from the adoption of insecticides, their extensive use and from efforts to reduce their use. Strategies include adoption of pest scouting/threshold spraying, avoidance of the use of pyrethroids at the early stages of crop development and mixing only compatible insecticides. Many other valuable lessons have been learned that could be a topic for the 2007 seminar.

Planting Seed: A Foundation for Good Yield and Quality

Variety development and seed production are related, but they are two different aspects of realizing high yields and achieving optimum fiber quality. Development of high yielding varieties and their release takes at least 10-12 years of concerted effort. But, good varieties are easily lost if countries do not have a good seed production system. Because of this, some countries depend on imported seeds, thus increasing the cost of planting seed to growers. Seed production may not involve scientific investigation, but it requires a well-defined and well-streamlined seed production system. Varietal purity cannot be maintained, and good quality seed cannot be produced, unless single plant selections are made in consultation with the respective breeders. A good quality seed can only be produced if the fields selected for seed production are regularly inspected and certified that requires close collaboration with breeders and the seed industry. The consequences of planting mixed-seed varieties are not only lower yields but also a mixture of fiber quality. There is also a need to bring uniformity in terminology used for various stages of planting seed, in addition to sharing the experience of successful seed certification, production, processing and distribution systems. Seed registration and intellectual property rights are other issues that could also be discussed during the 2007 Technical Seminar.

Report of the Chair of the Committee on Cotton Production Research

(5th Open Session/Technical Seminar)

Dr. Roberio Ferreira dos Santos

It is my pleasure to present to you the report of the Committee on Cotton Production Research of the ICAC. The meeting organized a Technical Seminar on the topic "Sustainability: Biotechnology and Crop Management" and decided topic for the 2007 Technical Seminar.

Cost of production determines the economic sus-

tainability of cotton production in all countries. Many factors including preference for higher yield but lower pest resistance, continuous increases in fertilizer doses and expansion in bollworms, boll weevil and other pests' attack has increased cost of production to uneconomical levels. However, a number of measures have been taken in Brazil and other countries that will reduce cost of production. These measures include increased adoption of crop rotations, zero tillage, virus resistant varieties, rationalized use of fertilizers and other inputs, use of generic pesticides and adoption of biotech cotton. The aggregate advantages of biotech cotton in Brazil are estimated at US\$284/ha.

A proposal was made to develop performance indicators against which progress could be

measured across countries in a uniform way for improving the image of cotton as an environmentally, economically and socially sustainable crop.

Early this year, ICAC concluded a five-year project on sustainable control of the American bollworm in small-scale production systems. The project, located in China (Mainland), India, Pakistan and UK, was funded by the Common Fund for Commodities and national organizations and executed by the Natural Resources International in the UK. The project identified reasons why the bollworm develops resistance to insecticides and made specific recommendations that how such a resistance could be tackled through efficient and least use of insecticides.

The project also developed an insecticide resistance detection kit and a technique to test insecticide quality. Both technologies have a commercial value.

The Committee on Cotton Production Research decided to hold the 2007 Technical Seminar on the topic "The Vision for 2025." Issues related to the planting seed will also be included in the Seminar. The Committee also decided that high priority should be given to sustainable cotton production at the World Cotton Research Conference-4 in Lubbock, Texas, USA from September 10-14, 2007. Preparations for the WCRC-4 are already underway and a website <http://www.wcrc-4.org> has been launched for online registration and hotel booking.

Breakout Sessions

First Breakout Session

Summary-Statement on the Development Aspects of Cotton

Raquel Gomes
Oxfam America

The main message coming out of the session was that the development of the cotton sector in Africa is in the hands of both Africa and the developed countries. More specifically, the session offered the following five conclusions:

1. From the perspective of cotton producers in Africa and other developing countries, we were repeatedly reminded of the key issue at hand: trade distorting agricultural subsidies continue depressing world cotton prices, hurting millions of cotton farmers in African and elsewhere. The losses in income, employment, and foreign revenues far outnumber all of the assistance committed thus far.
2. At the same time, the African cotton sector welcomes support from multilateral and bilateral donors to improve the efficiency and productivity of their cotton, including:
 - Investment in research (especially around varieties and technological characteristics)
 - Investment in training (especially for breeders and ginning)
 - Support to improve quality
 - Support to improve the classification system
 - Help with marketing tactics, sales info etc.

- Increases in funds for the countries who most need them

3. Concerns were raised that many of the pledges of development assistance around cotton have not actually been implemented. The gap between commitments and disbursement remain substantial and must be closed.
4. Recipient country governments also have a responsibility: to establish and/or strengthen institutions through which assistance can be channelled; to increase transparency in the allocation of donor funds; and to support their own cotton sectors.
5. Finally, participants raised the need for greater understanding of other factors affecting the competitiveness of African cotton. In particular, concerns were raised around the questions of exchange rate (including the possibility of managing the exchange rate) and on the impacts of second hand clothing on the African textile industry.

[Presentations and reports made by Mr. Ibrahim Mallum, Mr. Willem Olthof and Mr. Brinton Bohling are part of the statements of the meeting.]

Second Breakout Session

Standardization of International Trade Rules – Progress Since Liverpool

Over 40 people participated in the session which was chaired by Andrew Macdonald, with panelists, Neal Gillen, Jan Wellmann and Suresh Kotak.

The CHAIR opened the session by reading the fourth paragraph of the Statement of the 64th plenary meeting in Liverpool last year, which covered the recommendation from the Plenary for the trade to work toward standardization of the international cotton rules, and to conduct education efforts to ensure that all participants in the cotton business understand the implication of the rules.

He then called upon the Gdynia Cotton Association to make a presentation as regards the current situation in Europe, and the different rules being used in various European countries. The report's conclusion was that "the diversity of rules governing the cotton trade is a real barrier in cotton turnover". The report's author was confident that given time and good will, the objective of achieving one standard set of rules could be accomplished in Europe. The presentation from the Gdynia Cotton Association is a statement of the meeting.

The CHAIR then called upon Jan Wellmann, Executive Director of the Bremen Cotton Association, to comment on the presentation, especially as regards Bremen having officially adopted the International Cotton Association Rules, maintaining arbitration under domestic legislation. In his presentation he confirmed Bremen's adoption of International Cotton Association (ICA) rules and emphasized that the Bremen Cotton Exchange is commitment to standardized rules, and pressed other countries to make the same decision.

Mr Suresh Kotak of the East India Cotton Association explained that the EICA, after having received a copy of the ICA rules after the last Plenary, said that their Association was studying them very closely and would come forward with a recommendation in due course due to the

specific nature of the Indian market. However he concurred with the other speakers as to the advantage of one set of International Rules for cotton trading

The Chairman emphasized that there has to be a clear distinction between rules and law. There seems to be little reason for differences in the rules of the Associations, when in fact they are very similar, so that the main differences that are being discussed are based on the various national laws as they refer to arbitration. So, he suggested that as a first step each country could adopt standardized rules, but apply their own Bylaws according to the arbitration laws of their country, as Bremen has accomplished.

The CHAIR then asked Mr Neal Gillen of the American Cotton Shippers Association, based on his experience on the subject, if a single standardized international contract would or could eventually reduce the number of companies on the "default list". The Chairman noted that Mr. Gillen presented a paper of the question of defaulters to the Plenary Meeting of 2004 and that the updated report can be read in the published papers of the session. Mr Gillen reiterated his opinion that standardization of contract rules with the necessary education would greatly reduce defaults in the business. His report is a statement of the meeting.

The Chairman then raised the question of Alexandria Cotton Exporters' Association (ALCOTEXA) terms with Egyptian cotton, and the fact that the rules permitted cancelling part of a contract under certain circumstances, a situation that had occurred this year. The representative from Egypt explained the circumstances that the contract permitted cancellation at the end of the season, by paying a penalty of 10%. However in view of international pressure the problem was solved and the contracts had been honored. The Chairman remarked that for the future this might present an opportunity for ALCOTEXA to discuss with the ICA the adoption of the International Rules to avoid this type of misunderstanding from both the buyers and sellers.

The CHAIR then called upon the President of the International Cotton Association, Mr. Peter Wakefield, to comment on the following up of the recommendation of the 64th Plenary meeting to educate users on the international rules. Mr Wakefield confirmed that indeed the ICA had followed the plenary request, and had held many overseas workshops with good results. He also mentioned the work of the rules committee of ICA regarding standardization of arbitrations procedures for instrument testing. The question of a new membership and fee structure was also explained, designed to make

the Association more equitable and also to attract new members.

At the request of the CHAIR, Mr Wakefield also announced the plans for training courses for arbitrators which will shortly be available on the web site. The first examinations will be held this October. The President welcomed new potential arbitrators to take part, reminding the meeting that this was also part of the educational process, and as arbitrations may be held anywhere in the world, it is very important that the Association has available as many international arbitrators as possible.

The Chairman asked Mr Neal Gillen to update the meeting as regards the China Cotton Association (CCA) Contract. Mr. Gillen reported that though the proposed CCA contract was an improvement over the previous models in some respects, he still recommended that sellers use ICA rules. Mr. Gillen noted that penalties under CCA rules are very heavy. Negotiations will be on going to work towards China adopting the same international rules in common use around the world.

In conclusion, the participants of the meeting agreed that the session had been useful and that the work being proposed should continue.

DOCUMENTS

1. Agenda
2. Report of the Chairman of the Standing Committee
3. Report of the Executive Director
4. COTTON: Review of the World Situation, August-September 2006
5. COTTON: World Statistics – September 2006
6. The Outlook for Cotton Supply in 2006/07
7. World Textile Demand – September 2006
8. World Cotton Trade – September 2006
9. THE ICAC RECORDER - September 2006
10. Cotton Research Projects in Cotton - September 2006
11. Production and Trade Policies Affecting the Cotton Industry – September 2006
12. Directory
13. Survey of Fiber Testing Equipment

WORKING PAPERS

- I. Election of Standing Committee Officers
- II. Topic of the 2007 Technical Seminar
- III. Uncollected Assessments of Member Governments of the ICAC

REPRESENTATION

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First Vice Chairman

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