Fortifying the Cotton Supply Chain: New Approaches to New Challenges
PROCEEDINGS
OF THE
79th PLENARY MEETING

“Fortifying the Cotton Supply Chain: New Approaches to New Challenges”

ICAC
Washington DC, USA

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FOREWORD

In the context of the Covid-19 pandemic, the 79th Plenary Meeting of the International Cotton Advisory Committee (ICAC) took place virtually 6-9 December 2021.

The ICAC is an association of members of cotton producing, consuming and trading countries. The Committee was formed in 1939, and the Secretariat was established in 1946.

Mission
To serve the cotton and textile community through promotion, knowledge sharing, innovation, partnerships and providing a forum for discussion of cotton issues of international significance.

Vision
Prosperity through a sustainable cotton industry

Values
Excellence  Innovation  Objective  Trustworthy  Receptive  Passionate

MEMBER GOVERNMENTS

Argentina  Australia  Bangladesh  Brazil  Burkina Faso  Cameroon  Chad  Côte d’Ivoire  Egypt  European Union

India  Kazakhstan  Kenya  Korea, Rep. of  Mali  Mozambique  Nigeria  Pakistan  Russia  South Africa

Sudan  Switzerland  Taiwan  Tanzania  Togo  Turkey  Uganda  United States of America  Uzbekistan

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## Supply and Distribution of Cotton

### 1st December 2021

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Note:
- Seasons begin on August 1
- 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.
- Differences between calculated stocks and actual; amounts for forward seasons are anticipated.
- World less China’s ending stocks divided by world less China’s mill use, multiplied by 100.
- China’s ending stocks divided by China’s mill use, multiplied by 100.
- US cents per pound. Average price for a given season, August 1 to July 31 or average-to-date.
Fortifying the Cotton Supply Chain: New Approaches to New Challenges

1. The International Cotton Advisory Committee met between 6-9 December 2021 for its 79th Plenary Meeting since the establishment of the Committee in 1939. The meeting was the first to be held virtually and 575 persons registered including representatives from 24 Member Governments, 8 international organisations and 21 non-member countries.

2. Country Reports: Because of the time restrictions associated with running a virtual meeting, it was not possible to have discussion on individual Country Statements. However, Country Statements had been provided by 16 countries and one non member country and are available to read on the ICAC website, www.icac.org.

3. Reports from the Secretariat: For the 2021/22 cotton season, international cotton prices are expected to remain above that of the previous season. With sufficient 2020/21 ending stocks on the balance sheet to accommodate either a production decrease or a consumption increase, or both, upward pricing pressure is unlikely to be affected by supply and demand issues.

Covid-19 pandemic induced logistical complications as well as shipping and transportation concerns remain. These concerns extend into global trade which continues to recover from the Covid-19 pandemic-related shutdowns.

4. Production and Trade Subsidies Affecting the Cotton Industry: Featuring information from 11 countries, assistance to the cotton sector in 2020/21 has been estimated at $6.95 billion, an 18% decrease from the $8.51 billion observed in 2019/20. In 2020/21, assistance averaged 13 cents per pound, down from 14.8 cents per pound in 2019/20.

5. World Cotton Trade: During the 2019/20 season, the global economy underwent Covid-19 pandemic-induced slowdowns that decreased the global cotton trade. As the impacts of the Covid-19 pandemic were mitigated, the global economy began to recover and the 2020/21 season proved to be a very good year for cotton trade. Taking into consideration current trade policies and cotton crop progress and, despite the ongoing pandemic, it is estimated that cotton trade will remain strong in the current season.

6. Global Textiles Fibres Demand: In 2020, world textile fibre demand declined by 5% to 98.4 million tonnes, driven by the global economic downturn caused by the Covid-19 pandemic. The decline occurred after 11 years of continuous expansion. However, based on higher projected economic growth in the short term and an increase of nearly 1% in population, world textile fibre demand is projected to reach 107.3 million tonnes in 2021 and 125 million tonnes in 2025.

7. Textiles – Global Challenges and the ICAC: A sustainable textile industry is critical for the increased consumption and growth of cotton and to increase and strengthen international market share. The ICAC will formulate strategies to provide support to the private sector and member governments for the development of the textile value chain. Importantly, through the recently formed the Private Sector Advisory Council (PSAC), the ICAC will provide a platform to debate challenging issues and share knowledge with private and public sector organisations and submit mutually agreed-upon positions to member governments for consideration.

8. ICAC Cotton Data Book: Data from the ICAC Cotton Data Book indicates that there is an imminent need for Asian countries such as India, Pakistan and Uzbekistan to focus on precision farming and regenerative agricultural practices to increase soil health, yields and fertiliser use efficiency. Data also indicates that there is an urgent need for Africa, India and Pakistan to adopt best practices for yield enhancement to improve land-use efficiency and economic sustainability.

9. Report from PSAP: The Private Sector Advisory Council was formed with the approval of the Standing Committee and will include international, regional and national organisations representing producers, giners, merchants, spinners, weavers, machine manufacturers and retailers and brands.

10. Fortifying the Cotton Supply Chain: The complexity of agricultural production requires locally tailored solutions as well as collective and individual actions when it comes to the social, environmental and economic benefits of sustainability. Climate change, soil health and pestilence are the main environmental sustainability concerns in agriculture. Cotton not only provides food, feed, fibre and cash for education, health and housing, but also provides resilience to abiotic risks because of its tolerance to drought and saline soils. Cotton makes agriculture more sustainable by using nutrients left by shallow-rooted crops. The best approach for investing in and strengthening the integrity of cotton is through the education of stakeholders throughout the supply chain. Countries can greatly benefit from improving soil health as this would increase organic content in the soil to enable soil moisture conservation and reduce the need for synthetic fertilisers and reduce the need for pest management interventions. Governments and cotton organisations are encouraged to promote the social, environmental and economic benefits of producing sustainable cotton.

11. Labelling: Studies have shown that consumer concerns around sustainability are growing with the top environmental concerns being climate change; water scarcity; air pollution; ocean waste; land and waste management; and population growth. Life Cycle Assessment (LCA) results for a knit collared shirt indicate that cotton textile manufacturing contributes very little to global warming. However, cotton growing does contribute more to the other two environmental factors: water quality and water consumption. The European Union’s new policy on Product Environmental Footprint (PEF), using the Higg Index, raises concerns when comparing synthetic and natural fibres.
PEF’s LCA is based on the Higg Index, which does not provide a fair comparison between synthetics and natural fibres. The OECD due diligence guideline on Responsible Business Conduct can also play a leading role in product labelling. Labelling should aim to provide transparency and traceability in the supply chain and ensure that the brand is accountable for their claims and the purchasing decisions of the consumer. Some items for consideration on a label could include the country of origin, list of suppliers, CO2 emissions, water usage and the chemical impact of producing a garment.

12. Advances and Challenges of Hybrid Cotton Technology: Bt-hybrid cotton technology was highly successful in transforming India’s cotton productivity and is currently grown on 98% of India’s cotton area. Current yield stagnation could be broken by creating genetic variability to develop new hybrids with biotic/abiotic stress tolerance, short duration with high yield, better fibre parameters or by substituting the extant long-season Bt-cotton hybrids with short-season Bt-cotton varieties that would be better suited for rainfed area, which accounts for more than 65% of the cotton acreage in India. Analysis shows how rain-fed, non-GMO, non-hybrid, short-season, high-density cotton varieties could double yields and farmer income; avoid pink bollworm infestation; and reduce insecticide use and induced pest outbreaks. There is a need for specific studies to be conducted in Africa to assess the suitability of Bt-hybrids in rainfed conditions. An analysis of the global status of biotech cotton, organic cotton and hybrid cotton concluded that organic cotton had more potential for growth due to increasing consumer demand and that hybrid cotton may not survive the sustainability challenges due to the high cost of seeds and its unsuitability to irrigated conditions.

13. World Cafe: Challenges and Opportunities for Sustainability: Sustainability is one of the most important issues facing the cotton industry but the discussions showed that there is little consistency in the industry’s approach to sustainability. To effectively implement the changes that must be made, awareness of the challenges must improve throughout the supply chain and resources must be provided to meet those challenges. Small holder farmers, women, migrant workers and labourers in the textile industry are also most vulnerable to climate change. The Committee encourages leaders from all stakeholders in the cotton supply chain to continue to expand their efforts to increase the awareness of the issues regarding sustainability and climate change and to collaborate in finding the solutions needed to address them.

14. Steering Committee: The Committee noted the progress made against the 2020-2022 Strategic plan where over 80% of the Key Performance Indicators had been achieved. The Strategic meeting had discussed ideas and suggestions to provide a greater value proposition for members, a business model to attract hosts for the ICAC Plenary Meeting which included greater participation of the private sector through the Private Sector Advisory Council and ways to increase engagement of delegates through hybrid meetings and invitations to coordinating agencies.

15. The Topic of the 2022 Technical Seminar: The Committee decided that the 2022 Technical Seminar would be on the topic of, ‘How Regenerative Agriculture Can Contribute to a Sustainable Cotton Sector’.

16. Future Plenary Meeting: The Plenary Meeting for 2022 will be a virtual meeting to be held in December 2022.
بيان الاجتماع العام التاسع والسبعين

تقوية مراحل أعمال تورد القطن - مقاربات جديدة في مواجهة تحديات جديدة

1. لزيادة الاستهلاك ونمو القطن وتعزيز حصة السوق الدولية، وستقوم إيكاك بوضع استراتيجية تهدف إلى توفير الدعم للأعمال الخاص وتحقيق الاستدامة في توريد القطن من أجل تطوير مراحل أعمال المستهلك، وتحقيق أهداف الأزمة. ومن أهم الأهداف من خلال المجال الاستشاري للفلك PSAC الخاص منصة لمناقشة المسائل المشتركة بين المنظمات القطاعي الخاص، وتطوير استراتيجيات ملائمة لمواجهة التحديات.


4. الإنتاج والثروة العائدة المحلية هائحة بصناعة القطن: يحسب مساحة الفلاحين والمحصولات المتكاملة بغية تجهيز إذاعة في الاحتراف والزراعة في الانتفاع أو الشروط. وفي الاستخدام أو القانون أو الإنتاج، من الضريبة إلى الزيادة في الطلب. من جوانب المساهمة في تحسين حقيقة الفلاحين في العالم وتعويز في النقل أو الطلب.

5. تدشين القطاع العام: خلال موسم 2020/2021 وواجت الإنتاج العالي للقاطع: بحث إيكاك 19 إفاقات أدت إلى تهدئة القطن النمو والثروة العائدة المحلية. ومع تراجع أثر جائحة كوفيد- 19 أظهرت الإنتاج العالي على الت嚅ب، وهذا كان موسمًا جيدًا للغاية بالنسبة للإنتاج والطلب. إذا تجاوزت القطن 4000 وزارعت الأراضي والتمكن في محاصيل القطن، فإن مهمة تواجه القطن، بغض النظر من الجائحة المالية، ستبقى قوية في المواسم الحالية.

6. الطاقة النسبية على الألياف السجينة: في عام 2020، تراجع الطاقة النسبية على الألياف السجينة بنسبة 5٪ إلى 98.4 مليون طن، بعد أن كاف للإطار الاقتصادي في السعودية 1960، وعدد السنين بنسبة 1٪ تقريباً. ومن النتائج التي زاولة البذور في تراجع الطاقة النسبية على الألياف السجينة 178 إلى 187 مليون طن في عام 2025.

7. توصيف المبادرات: أظهرت الدراسات أن مخاوف المستهلك بشأن الاستدامة أخذت في الازدياد. أيضاً لـ PSAP الخاص منصة لمناقشة المسائل المشتركة بين المنظمات القطاعي الخاص، وتطوير استراتيجيات ملائمة لمواجهة التحديات.

8. كابانيا حول بيانات القطن: نشر البيانات من كتاب إيكاك حول بيانات القطن إلى نجاح المحزمة كبيرة بالنسبة لبلدان الأسويدي، مثلاً الهند، باكستان، وروسيا، التي تركز على الزراعة الدقيقة والممارسات الزراعية، وقد تشكل ذلك إيكاك 2021-2022، وذلك لزيادة صحة الثروة والغذاء، وفعالية استخدام الأراضي، وتبقى في الاستدامة الاقتصادية.

9. تقرير من المجال الاستشاري للقطاع الخاص (PSAP): يظهر بيانات القطن إلى نجاح المحزمة كبيرة بالنسبة لبلدان الأسويدي، مثلاً الهند، باكستان، وروسيا، التي تركز على الزراعة الدقيقة والممارسات الزراعية، وقد تشكل ذلك إيكاك 2021-2022، وذلك لزيادة صحة الثروة والغذاء، وفعالية استخدام الأراضي، وتبقى في الاستدامة الاقتصادية.

10. تقدير مسار مصطلح توريد القطن: عندما يتعلق الأمر بمناطق الاستدامة الاجتماعية والبيئية، فإن تعد العملية الزراعية ومناطق ثورة وفردية. ويعبر نتائج تقييم دورة العمر Higg PE LCA 4 2019 عن اعتبار الطاقة المتجددة. وتحقيق الاستدامة الاقتصادية.

11. تدشين القطاع العام: خلال موسم 2020/2021 وواجت الإنتاج العالي للقاطع: بحث إيكاك 19 إفاقات أدت إلى تهدئة القطن النمو والثروة العائدة المحلية. ومع تراجع أثر جائحة كوفيد- 19 أظهرت الإنتاج العالي على الت嚅ب، وهذا كان موسمًا جيدًا للغاية بالنسبة للإنتاج والطلب. إذا تجاوزت القطن 4000 وزارعت الأراضي والتمكن في محاصيل القطن، فإن مهمة تواجه القطن، بغض النظر من الجائحة المالية، ستبقى قوية في المواسم الحالية.

12. الطاقة النسبية على الألياف السجينة: في عام 2020، تراجع الطاقة النسبية على الألياف السجينة بنسبة 5٪ إلى 98.4 مليون طن، بعد أن كاف للإطار الاقتصادي في السعودية 1960، وعدد السنين بنسبة 1٪ تقريباً. ومن النتائج التي زاولة البذور في تراجع الطاقة النسبية على الألياف السجينة 178 إلى 187 مليون طن في عام 2025.
المحققون العالميون: تحليل الاهتمامات وفرصها: تعتبر الاستدامة من بين المسائل الأكثر أهمية تواجه صناعة القطن، إلا أن الدراسات أظهرت أن التقلص بين مقارنة الصدمة العملية الاستدامة قليل. وتنيد الغيرات الواجب اتخاذها على نحو قواعد تحسن نسبة النضجية في كل مرحلة عملية القطن، كما يتوفر الموارد اللازمة لواجهة هذه التحديات. ويعاني صغار المزارعين، والعمال المهاجرين، والعمال الأطفال في المنظورات التي من سنة وثابتة تغير المناخ. وتشجع النجاح في القيادة المثمرة، على مراحل توريث القطن على أن يواصلهم جهودهم في زيادة النوعية بالنسبة للمسائل المتعلقة بالاستدامة وتحقيق المعايير. وأعلى أن يتعملوا في إيجاد الحلول الضرورية لمعالجته.

اللجنة التنظيمية: احترفت النهج التكنولوجي التقدم الذي أحرز في إطار الخطط الاستراتيجية 2020/2026 حيث تحقق أكثر من 80% من مؤشرات الإطار الرئيسي، وأمام الخطط الاستراتيجية قد ناقشت بعض الألفاظ والاقتراحات بهدف معرفة مدى تأثير المحتوى، يكون مثابة أموال أعمال إجادة أطراف تقدم باستضافة الأشخاص العام للجماعة الاستدامة الدولية للقطن (إيكاك). ويتبع هذا النهج المشاريع أكبر من جانب القطاع الخاص، من خلال المجال الاستراتيجي للقطاع الخاص، وزيادة مشاركة المدونين على نحو أكبر في الاجتماعات المختلفة، وتوجيه الدعوات إلى الوكالات التجارية.

موضوع الندوة التقنية لعام 2022: قررت اللجنة أن موضوع الندوة التقنية لعام 2022 سيكون "كيف يمكن للزراعة المتدرجة أن تساهم في قطاع القطن المستدام".

الاجتماع العام القادم: سيكون الاجتماع القادم في عام 2022 افتراضياً ومعتقد في شهر ديسمبر/كانون الأول 2022.
Заявление о работе 79-го пленарного заседания
«Укрепление цепочки поставок хлопка – Новые подходы к новым вызовам»

1. Международный консультативный комитет по хлопку собрался 6-9 декабря 2021 года на свое Пленарное заседание -- 79-е с момента создания Комитета в 1939 году. Это заседание было первым, которое было проведено в виртуальном режиме; на него зарегистрировалось 575 человек, включая представителей 24 правительств-членов, 8 международных организаций и 21 страну, не являющуюся членом комитета.

2. Доклады стран: Из-за ограничений по времени, связанных с проведением заседания в виртуальном режиме, не было возможности обсудить Заявления отдельных стран. Однако 16 стран и одна страна, которая не является членом МККХ, представили свои Заявления, и с ними можно ознакомиться на веб-сайте МККХ www.icac.org.

3. Отчеты Секретариата: Ожидается, что в хлопковом сезоне 2021/22 года мировые цены на хлопок будут оставаться на более высоком уровне, чем в течение предыдущего сезона. На балансовой ведомости за 2020/21 год имеются конечные запасы хлопка, объем которых будет достаточно в случае сокращения объема производства или увеличения объема потребления, или и в том и другом случае, а проблемы спроса и предложения вряд ли повлияют на повышение ценового давления. Сохраняются логистические осложнения, вызванные пандемией Ковид-19, а также проблемы с поставками, связанные с морскими и наземными перевозками. Эти опасения распространяются и на глобальную торговлю, которая продолжает восстанавливаться после локдауна, связанного с пандемией Ковид-19.

4. Производственные и торговые субсидии, влияющие на хлопковую отрасль: Согласно информации из 11 стран, помощь хлопковому сектору в 2020/21 году оценивается в 6,95 млрд. долл., что на 18 % меньше по сравнению с 8,51 млрд. долл., которые были зафиксированы в 2019/20 году. В 2020/21 году размер помощи в среднем составлял 13 центов за фунт, что явилось снижением по сравнению с 14,8 центами за фунт в 2019/20 году.

5. Мировая торговля хлопком: В течение сезона 2019/20 года мировая экономика переживала спад, вызванный пандемией Ковид-19, что привело к сокращению объема мировой торговли хлопком. По мере смягчения последствий пандемии Ковид-19 мировая экономика начала восстанавливаться, и сезон 2020/21 года оказался очень хорошим годом для торговли хлопком. Принимая во внимание текущую торговую политику в мире и прогресс в деле выращивания хлопка, а также, несмотря на продолжающуюся пандемию, ожидается, что снижение уровня спроса в текущем сезоне останется на высоком уровне.

6. Мировой спрос на текстильные волокна: В 2020 году мировой спрос на текстильные волокна снизился на 5% до 98,4 млн. тонн, что обусловлено мировым экономическим спадом, вызванным пандемией Ковид-19. Спад произошел после 11 лет непрерывного роста. Однако, основываясь на прогнозе более интенсивного экономического роста в краткосрочной перспективе и увеличении численности населения почти на 1%, мировой спрос на текстильное волокно, по прогнозам, достигнет 107,3 млн. тонн в 2021 году и 125 млн. тонн в 2025 году.

7. Текстиль – Глобальные проблемы и МККХ: Устойчивая текстильная промышленность имеет решающее значение для увеличения потребления и роста объема хлопка, а также для увеличения и закрепления его доли на мировом рынке. МККХ разрабатывает стратегию для оказания поддержки частному сектору и правительствам стран-членов в интересах развития цепочки создания добавленной стоимости в текстильной промышленности. Важно отметить, что действуя через недавно созданный Консультативный совет по частному сектору (КСЧС) МККХ обеспечит платформу для обсуждения сложных вопросов и обмена знаниями с организациями частного и государственного секторов, а также представит взаимо согласованные позиции правительствам стран-членов для рассмотрения.

8. Сборник данных МККХ по хлопку: Данные из Сборника данных МККХ по хлопку указывают на то, что азиатским странам, так им Индии, Пакистан и Узбекистан, необходимо сосредоточиться на прецизионной модели ведения сельского хозяйства и методах регенеративного сельского хозяйства для улучшения здоровья почвы, повышения урожайности и эффективности использования удобрений. Данные также свидетельствуют о том, что Африке, Индии и Пакистану настоятельно необходимо внедрить передовые методы роста урожайности для повышения эффективности землепользования и экономической устойчивости.

9. Отчет КСЧС: Консультативный совет по частному сектору был сформирован с одобрения Постоянного комитета, и он будет включать в свой состав международные, региональные и национальные организации, представляющие производителей, джиннеров, торговцев, прядильщиков, ткачей, производителей стаканов, представителей розничной торговли и брендов.

10. Укрепление цепочки поставок хлопка: Сложность сельскохозяйственного производства требует решений, привязанных к местным условиям, а также коллективных и индивидуальных действий, когда речь идет о социальной, экологической и экономической выгоде, получаемой благодаря устойчивости. Изменение климата, здоровье почвы и эпидемии являются основными проблемами экологической устойчивости в сельском хозяйстве. Хлопок не только обеспечивает продовольствием, кормами, волокном и одеждой, но также обеспечивает устойчивость к биотическим рискам из-за его устойчивости к засухе и засоленным почвам. Хлопок делает сельское хозяйство более устойчивым за счет использования питательных веществ, оставляемых культурой, а также, коллективными и колониальными стаканами и брендах. Наконец, улучшение качества и повышение эффективности использования хлопка приводят к улучшению состояния почвы, поскольку это увеличивает содержание органических веществ в почве, что позволяет сохранять почвенную влагу и уменьшать потребность в синтетических удобрениях, а также снижать потребность в мероприятиях по борьбе с вредителями. Правительствам и
организациям, которые занимаются хлопком, рекомендуется пропагандировать социальные, экологические и экономические выгоды производства экологически чистого хлопка.

11. Маркировка: Исследования показали, что у потребителей растет озабоченность относительно устойчивости, причем главными экологическими проблемами являются изменение климата, нехватка воды, загрязнение воздуха, сброс отходов в океан, управление земельными ресурсами и отходами, а также прирост населения. Результаты оценки жизненного цикла (LCA) трикотажной рубашки с воротником показывают, что производство хлопчатобумажных тканей очень мало способствует глобальному потеплению. Однако производство хлопка больше воздействует на два других экологических фактора: на качество и на потребление воды. Новая политика Европейского союза в отношении воздействия продукции на окружающую среду (PEF) с использованием индекса Хигга вызывает озабоченность при сравнении синтетических и натуральных волокон. Результат воздействия продукции на окружающую среду при оценке жизненного цикла основан на индексе Хигга, который не обеспечивает получения справедливого сравнения синтетических и натуральных волокон. Инструкция ОЭСР по должной осмотрительности в отношении ответственного ведения бизнеса также может сыграть ведущую роль при маркировке продукции. Маркировка должна быть направлена на обеспечение прозрачности и прослеживаемости в цепочке поставок, а также на обеспечение того, чтобы бренд отвечал за свои представления и за решение потребителя о покупке. Можно было бы рассмотреть вопрос о включении в этикетку таких пунктов, как страна происхождения, перечень поставщиков, выбросы CO2, использование воды, а также химическое воздействие в результате производства предмета одежды.

12. Достижения и проблемы технологии производства гибридного хлопка: Технология Bt-гибридного хлопка была очень успешной в деле повышения производительности хлопка в Индии, и в настоящее время он выращивается на 98% площадей под хлопком в Индии. Нынешнюю стагнацию показателей урожайности можно было бы преодолеть путем создания генетической изменчивости для выведения новых гибридов с устойчивостью к биотическим и абиотическим стрессам, с краткосрочным сроком культивации и высокоурожайностью, с лучшим параметром волокна или путем замены существующих длинносезонных гибридов Bt-хлопка на короткосезонные сорта, которые бы лучше подходили для больших районов, на которые приходится более 65% посевых площадей под хлопком в Индии. Анализ показывает, что неорганические, не содержащие ГМО, негибридные, короткосезонные сорта хлопка с высокой плотностью посева могут улучшить урожайность и доходы фермеров; обеспечивать избегание заражения розовым коробочным червем и снижать объемы использования инсектицидов, а также сокращать число случаев, связанных с вспышками появления вредителей. Существует необходимость в проведении специальных исследований в Африке для оценки пригодности Bt-гибридов в неорошаемых условиях. Анализ глобального состояния генно-модифицированного хлопка, органического хлопка и гибридного хлопка позволил сделать вывод о том, что органический хлопок обладает большим потенциалом для роста в связи с увеличением потребительского спроса, и что гибридный хлопок может не выдержать проблем с устойчивостью из-за высокой стоимости семян и его непригодности для орошаемых условий.

13. Всемирное кафе: Проблемы и возможности для устойчивого развития: Устойчивость является одним из наиболее важных вопросов, стоящих перед хлопковой промышленностью, однако обсуждение показало, что подход отрасли к устойчивости отличается недостаточной последовательностью. Для эффективного осуществления изменений, которые необходимо внести, следует повысить осведомленность о проблемах во всей цепочке поставок, и для решения этих проблем должны быть предоставлены ресурсы. Мелкие фермеры, женщины, трудящиеся-мигранты и работники текстильной промышленности также наиболее уязвимы к изменению климата. Комитет призывает руководителей всех заинтересованных сторон в цепочке поставок хлопка продолжать наращивать свои усилия по повышению осведомленности о проблемах, касающихся устойчивости и изменениях климата, и сотрудничать в поиске решений, необходимых для их урегулирования.

14. Подготовительная комиссия: Комитет отметил прогресс, достигнутый при выполнении стратегического плана на 2020-2022 годы, а также то, что было реализовано свыше 80% ключевых показателей эффективности. Во время заседания по вопросам стратегии были обсуждены идеи и пропозиции, направленные на выдвижение более ценных предложений для членов и бизнес-моделей для привлечения организаторов к проведению Пленарного заседания МККХ, которое бы предусматривало более широкое участие частного сектора по линии Консультативного совета по частному сектору, а также путей расширения участия делегатов посредством гибридных совещаний и приглашений в адрес координирующих учреждений.

15. Тема повестки дня Технического семинара в 2022 году: Комитет постановил, что Технический семинар 2022 года будет посвящен теме «Как регенеративное сельское хозяйство может способствовать устойчивому развитию хлопкового сектора».

**Inaugural Plenary Session**

08:00 to 9:40 am (GMT-5),
Monday 6 December 2021

Chairman: Mr. Anshul Sharma, Chairman of the ICAC Standing Committee,

Mr Anshul Sharma, Chairman of the ICAC Standing Committee, opened the proceedings of the first day of the virtual 79th Plenary session of the International Cotton Advisory Committee by delivering his inaugural address. In that address he recognized the work the ICAC had carried out during the year and especially highlighted the innovative projects initiated by the ICAC, despite the pandemic.

The agenda was then put forward for formal approval.

The delegate from Pakistan requested that germplasm exchange should be added to the agenda. The Secretary General, Mr Kai Hughes noted the suggestion and proposed that this should be discussed as a subject for a future Plenary meeting.

The agenda of the plenary session was approved.

This was followed by the address by Mr Kai Hughes, ICAC Executive Director.

Mr Hughes highlighted how Covid-19 had been a catalyst for change and innovation within the ICAC. In particular he noted that the various projects the ICAC had been able to attract over $2.6m in funding for over the past couple of years and the formation of the Private Sector Advisory Council which will bring together private sector associations from throughout the whole of the cotton supply chain.

Looking ahead, he highlighted a new initiative that the ICAC had developed along with CIRAD and the African Cotton Foundation. The African Cotton Sustainability Programme 2030 is a holistic, pan African initiative which has the potential to transform African economies, increasing cotton yields and value addition leading to increases in GDP and employment - by 6 million in West Africa alone. The Executive Director called upon African governments countries to sign up to participate in the programme and assist the ICAC in securing funding for it.

He also pointed out that the ICAC has probably had its busiest year to date and despite Covid, managed to achieve more than 80% of the objectives in the ICAC’s Strategic Plan. He also mentioned the renewed strength of the cotton team with the recruitment of several new and key members of Secretariat. The additions of Mr Kanwar Usman as Head of Textiles; Mr Mathew Looney as Data Scientist; Ms Parkhi Vats as Commodity Trade Analyst; and Mrs Alex Preston as ICAC Accountant, have increased the capabilities of the ICAC and thus the value it provides to its members.

**Recognition of the ICAC Researchers of the Year, 2020 and 2021 and Presentations.**

The International Cotton Advisory Committee recognizes annually, cotton researchers from across the globe, for their significant contributions in cotton research. Dr. K. Raja Reddy was declared the ICAC Researcher of the Year 2020 for his outstanding research on the impact of climate change on cotton. Dr. Bruce Tabashnik and Dr. Jonathan Wendel were declared joint winners in the year 2021 for their outstanding work on insect resistance to biotech cotton and evolution of cotton genomes respectively. The winners made a crisp and lucid virtual presentation on their achievements.

**Speeches from the ICAC panels and Committees.**

**Private Sector Advisory Council – PSAC**

Mr. Peter Wakefield, Chair, Private Sector Advisory Panel informed the participants that the Standing Committee had the formation of the Private Sector Advisory Council - the PSAC – and its membership is currently being finalized. Two subcommittees- on cotton promotion and on membership and structure were active in their specific areas. The subcommittee on Cotton Promotion ensured that there was a successful World Cotton Day on 7 October when the United Nations approved a resolution submitted by the Cotton-Four countries (Benin, Burkina Faso, Chad, and Mali) plus Cote d’Ivoire, requesting that 7 October be reserved for World Cotton Day on its permanent calendar. The sub-committee on membership and structure spent much of its effort on the plan to re-organize the PSAP into the PSAC, which involved changing from an individual-based membership to an organization-based structure, that allows only regional, national, and international organizations to be members.

Mr. Wakefield confirmed that the PSAC would include representation from producers and ginning; merchants and cotton-related activities; spinners, weavers, and machinery manufacturers; and brands and retailers thus involving all sectors of the cotton supply chain. Each sector would have a Chair, plus two additional members on an Executive Committee, that would be responsible for coordination of topics between the stakeholders and the member Governments.

**International Cotton Researchers Association, ICRA**

Dr Mohamed Negm, Chair of ICRA, presented the activities of the ICRA executive committee. He informed those present that ICRA and ICAC would closely interact to organize the World Cotton Research Conference (WCRC 7) to be held in Egypt from 3-7 Oct 2022. Dr. Negm sought support from the private sector to strengthen the participation of researchers in global cotton meetings, especially the world cotton research conferences. He said that the ICRA is also trying to facilitate the exchange of germplasm lines and cotton varieties through international cooperation. Dr. Negm noted that ICRA had started a monthly newsletter titled ‘Cotton Innovations’ that had been assigned an ISSN number and is being published regularly to highlight the latest progress in cotton science. ICRA and ICAC will shortly publish a book of papers, which is a compilation of research results and will be presented at the WCRC-7. ICRA also proposes to publish an Encyclopedia of cotton with contributions from researchers across the globe.
Reports from the ICAC Secretariat

09:45 am to 11:15 (GMT-5), Monday 6 December 2021
Chairman: Mr. Anshul Sharma, Chairman of the ICAC Standing Committee

Mr Anshul Sharma opened the session by inviting Mr. Matthew Looney, Data Scientist at the International Cotton Advisory Committee to deliver his presentation. Mr. Looney made his presentation on World Cotton Market.

World Cotton Market
Mr Looney noted that the Cotlook A-Index price has risen dramatically during the 2020/21 season and current price of cotton is at a level not seen in over 10 years. He indicated that the high volatility in prices is likely to remain intact for the remainder of the 2021/22 season but it is unlikely the price will continue to increase much beyond the current point.

He noted that the Secretariat’s current projection for consumption in 2021/22 is 25.63 million tonnes, a 0.13% decline over the previous season. Ending stocks for the 2021/22 season are estimated to increase 1% to 20.46 million tonnes.

Mr Looney concluded his presentation by pointing out that if mill use remains strong then consumption will outpace production and resultantly Price is likely to remain elevated for the remainder of the 2021/22 season. He suggested that global stocks are currently sufficient to accommodate increased demand which is estimated to increase slightly into the 2021/22 season. Further, if strong demand materializes and production remains at or below the current forecast, global ending stocks could drop significantly.

World Cotton Trade
The Chair invited Ms Parkhi Vats, Commodity Trade Analyst at International Cotton Advisory Committee (ICAC) to deliver her presentation.

Ms Vats made her presentation on World Cotton Trade. She noted that the previous season saw the global economy undergo an unusual slowdown due to pandemic-induced lockdowns, business closures, shipment and transport restrictions, in a way that was never experienced before. She provided an overview of the exports, imports and consumption country wise and region wise. She also highlighted the major gainers and losers in last decade specially in last two years.

It was also noted that amongst the many variables that impact trade, three major ones have the potential to impact trade in 2021/22 season. They are trade policies and trade tensions between countries, the progress of the cotton crop and the effects of the on-going pandemic and supply chain disruptions. She discussed major partnerships among countries, specifically China-US, China-Brazil, India-Pakistan etc and then provided a comprehensive summary of world demand and supply and importantly, supply side disruptions.

Ms Vats noted that while factory operations have revived in consuming countries, concerns about the spread of Covid-19’s new variants and rise in cases still pose a threat to the recovering cotton sector. She concluded with the message that while governments are trying to resolve these issues, it is expected that some of these issues may last way into the current season.

World Textile Fibre Demand
The Chair invited M. Lorena Ruiz, ICAC Economist, to deliver her presentation on World Textile Fibre Demand.

Ms Ruiz noted that in 2020, the global fibre demand experienced an overall steep decrease of 5% caused by the covid-19 pandemic and the global economic downturn. The decline occurred after 11 years of continuous expansion, and its magnitude was higher than the decline observed during the financial crisis of 2008/09. She noted that that global fibre textile demand is poised to recover in 2021 and that the Secretariat is forecasting a total growth of 9% to reach a total of 107 million tonnes, the highest level ever recorded. In 2020, global apparel exports decreased by 11%, almost $420 billion dollars, lowest in eight years.

Ms Ruiz pointed out that the main competing fibre for cotton or any other natural fibre was demand for polyester. She noted that the demand for cellulose fibres has shown a rapid growth in recent years, increasing from 2.7 million tonnes in 2008 to a new record of 6.3 million tonnes in 2019.

Ms Ruiz concluded her presentation by noting that governments and organisations are promoting a more sustainable fashion industry and this means more consumption of cotton, sustainable fibre compared to its rival, polyester.

Textiles, Global Challenges and ICAC
The chair then invited Mr Usman Kanwar, Head of Textiles, to make his inaugural presentation on ‘Textiles, Global Challenges and the ICAC’.

Mr Usman noted that global trade in textiles was addressed under the WTO Agreement on Textiles and Clothing (1994) and on 1 January 2005, quotas were eliminated from the textile value chain. However, the Doha Round was not concluded, therefore import tariffs were not further reduced. He said that the textile trade has increased from $96 billion in 1980 to $800 billion in 2020 and in the post-quota era, textile trade has doubled. He discussed various models for the development of the textile value chain and noted that overall, the trading system has changed from one that was producer-driven to big and few retail- and buying-house driven. Moreover, to cater the larger orders, production has been concentrated to on a few countries.

He raised concern that policies were not favouring the development of small and medium businesses in the textile and apparel value chain and the importance of government support especially regarding the costs associated with doing business for domestic producers to allow them to be competitive in international markets. Mr Usman also highlighted the opportunities available by addressing challenges such as market access; concessions available to some countries; sustainability through compliance certifications; intellectual property rights; second-hand clothing; the impact of high import tariffs; the use of non-tariff barriers (NTB), technical barriers on trade (TBT) and other trade defence measures. He emphasised the importance of market access for all elements of the cotton trade and the opportunities created by e-commerce and technical textiles in the sustainable development of a country’s textile sector within developing countries. Mr Usman pointed out that other important challenges were to balance profit-sharing among the various segments of the value chain and importantly to be part of the global value chain.

Mr Usman also noted that the ICAC’s recognition of the importance of the textiles value chain for the sustainable development of cotton resulted in the creation of the Head of Textiles position he now holds. Another
important development was the formation of the Private Sector Advisory Council (PSAC) comprising cotton producers, gimmers, traders, textiles value chain, machinery allied industries, brands and retailers. The PSAC will play a very important role in providing a forum for the entire value chain to discuss and highlight challenges and develop proposed solutions for consideration by member governments.

Mr Usman explained that the ICAC’s vision will be to help develop a sustainable, global textiles and clothing value chain comprising producers, manufacturers, allied industries, distributors, retailers and brands to fully utilise the potential for member governments to generate maximum value addition and create maximum employment.

He concluded his presentation by noting that the ICAC is unique among other international commodity organisations as it represents and engages the entire value chain including governments.

The Chair again invited Ms Ruiz to make her presentation on Production and Trade Subsidies Affecting the Cotton Industry.

Production and Trade Subsidies Affecting the Cotton Industry

Ms Ruiz indicated that government subsidies for cotton included a number of different programmes, such as direct support to production, border protection, crop insurance subsidies, minimum support price mechanisms, as well as input and transportation subsidies. Each of these support programmes have different provisions and effects on the cotton sector. The ICAC Secretariat has estimated that subsidies to the cotton sector reached a total of $6.95 billion dollars in the 2020/21 crop year, an 18% decrease from the $8.5 billion dollars observed in 2019/20.

Subsidies provided by various countries were explained at length, especially the Chinese model of reserve pricing, target price-based system, direct subsidy payments and transportation especially for Xinjiang and also import quotas or sliding rates.

It was noted that the Chinese government uses different tools to support cotton, with the total value of the many programmes linked to cotton being unknown. The total sum of known programmes provided to producers in China is estimated at $3.9 billion in 2020/21. Ms Ruiz noted that the US government provides support to cotton producers through several programmes such as cotton insurance premium subsidies. The sum of all types of support programmes tied to planted cotton that are provided to U.S. producers was $625 million dollars in 2020/21, while Price Loss Coverage (PLC)/Agricultural Risk Coverage (ARC) payments reached $454 million dollars. The government of India also provided several programmes to support cotton farmers such as the Minimum Support Price (MSP) system. She pointed out that in mid-November, the Cabinet Committee on Economic Affairs in India had approved a total of 174 billion rupees (equivalent to about US$2.4 billion) to reimburse the losses that the Cotton Corporation of India incurred due to the MSP procurement between marketing years 2014/15 and 2020/21. Ms Ruiz also provided details of subsidy programs in European and African countries.

ICAC Cotton Data Book

The Chair invited Dr Keshav Kranthi, ICAC Chief Scientist, to deliver his presentation on the ICAC Cotton Data Book. Dr Kranthi noted that the current edition of the publication has data on cotton production and cotton trade of 38 major cotton-producing and consuming countries. Cotton production data included information from different cotton-growing provinces, states or regions of each of the countries listed and covered aspects related to the number of farmers, area, production, productivity (yield), seed processing, tillage methods, planting methods, stalk usage, weeding practices, methods of harvesting and ginning, spray application methods, fertiliser usage, cropping systems, water footprint, cost of production, cost of cultivation, etc. Dr Kranthi compared the sustainability impact of cotton on various regions. In particular, he noted that globally, more than 22.0 million farmers cultivated cotton in 2020 and that India, China, Africa and Pakistan host 95% of the global cotton farmers. Cotton farming provides sole income and supports livelihoods for the 22 million small-holder farmers in Asia and Africa. India, China, Africa and Pakistan also provide farm employment of 2.4 billion man-days every year, he said, and then comprehensively shared the data sets for various regions and major countries for environmental and economic aspects of cotton. Dr Kranthi concluded his presentation with the recommendation that that there was an imminent need for Asian countries such as India, Pakistan and Uzbekistan to focus on precision farming to increase fertilizer use efficiency and for Africa, India and Pakistan to adopt best practices for yield enhancement to improve land-use-efficiency and economic sustainability.

Mr Kai Hughes, ICAC Executive Director, then opened the forum for questions. The first question was asked by the delegate from Pakistan Dr Talpur, who requested that Mr Looney provide his views on future cotton prices. Mr Looney informed him that although stocks were at a level where prices were not expected to go beyond current levels. He did state, however, that there are many factors such as supply-chain disruptions, pandemic restrictions and new variants of the pandemic which made it difficult to know exactly how prices will respond. Ms Ruiz also contributed by noting that whenever prices are higher than 90 cents/lb, historically, the following year production increases and prices decrease.

Mr Nahibrahim, delegate from Sudan, suggested that non-technical and other aspects of cotton be covered in the various ICAC reports and newsletters. Dr Kranthi noted the comment and agreed to discuss it with the International Cotton Researchers Association (ICRA) which had produced the reports.

The delegate from the United States, Mr Patrick Packnett, asked Ms Vats to further elaborate on the China-Brazil Memorandum of Understanding (MoU) on cotton. Ms Vats replied that she would provide the information to him.

With time being exhausted, the Chair thanked the presenters and participants and formally closed the session.
First Open Session
Fortifying the Cotton Supply Chain

08:00 am to 10:00 am (GMT-5), Tuesday 7 December 2021
Chairman: Dr Adama Coulibaly, General Director of Cotton and Cashew Council, Côte d’Ivoire

Dr Kater Hake, Vice President, Agricultural & Environmental Research, Cotton Incorporated

Dr Hake spoke on the topic of, ‘What is Sustainable Cotton’. He highlighted the complexity of agricultural production and the need for locally tailored solutions as well as collective and individual actions when it comes to sustainability. He stated that, according to research data, the impact of phosphorus in freshwaters such as lakes and rivers will significantly increase methane production to the point where it could be one-third of the GHG contribution from fossil fuels. Dr Hake stated that the first challenge for sustainability is climate change as it threatens human sustainability. Climate change can have an impact on temperature and rainfall and negatively affect the production of food and natural fibres. A second sustainability concern is nutrients — both the unlimited supply of nitrogen, and the limited supply of phosphorus, have huge impacts on the environment. The third main concern is related to pest susceptibility. However, genome editing is currently one of the best tools to make cotton less susceptible to pests. Dr Hake pointed out that cotton makes agriculture more sustainable by removing nutrients that are left over from other crops that might have contributed to groundwater contamination. He also noted some other benefits of producing cotton — such as providing food, feed, fibre and cash for education, health and housing — cotton is a highly drought- and salt-tolerant plant; and farmers use expertise and innovations from cotton in all of their crops across all of their fields. Dr Hake concluded his presentation by applauding GIZ for supporting the ICAC’s effort to bring innovation to small farmers with the Soil and Plant Health app. He emphasised that technology allows growers to share innovations that address local concerns.

Ms La Rhea Pepper, Chief Executive Officer and co-founder of Textile Exchange

Ms Pepper spoke on ‘The Integrity of Organic Cotton’. She gave a brief overview of the Textile Exchange organisation and its Climate+ strategy, and reminded all participants about the meaning of organic agriculture and outlined the requirements and benefits of producing organic cotton. She noted that the term ‘organic’ has more legal protections and scrutiny than any other sustainable initiative. Ms Pepper highlighted that cotton currently has two voluntary standards that address the post-harvest tracking and labelling of products containing organic cotton: the Organic Cotton Standard and the Global Organic Textile Standard. She expressed that the best approach for investing and strengthening the integrity of organic cotton was through the education of stakeholders throughout the supply chain. Ms Pepper recommended that in order to institutionalise integrity in the organic cotton supply chain, brands and supply chain partners should invest in developing policies, investigate and corroborate claims if there any concerns about a product, share evidence with relevant authorities and stakeholders and collaborate and share monitoring with trusted partners. Ms Pepper concluded her presentation by emphasising that cotton has a significant opportunity in both the present and the future time to play a role in being the preferred fibre of choice when it comes to mitigating climate change.

Mr. Anupam Gupta, President of the cotton leadership team, Olam

Mr Gupta spoke on ‘Challenges in the Sustainable Cotton Supply Chain’. He provided an overview of the cotton textile value chain, from production, ginning, marketing, textile manufacturing, garmenting and home textiles to brands and retailers. He wondered if the fast-fashion industry was sustainable for our climate and communities. He felt that environmental concerns and consumer sentiment are leading several fashion brands to launch sustainability initiatives. He noted that there is a need for an integrated approach to sustainable fashion. In global supply chains there is a need to balance efficiency with resilience, to diversify production networks, to be responsive and agile and implement demand-driven sourcing. Mr Gupta pointed out that sustainable textile products are made from sustainable raw materials, have to be processed through transparent and traceable supply chains and must have improved ecological and social footprint. He mentioned some examples of regenerative farm practices implemented with farmers in Africa — erosion control, cover crops and green manure, composting, revegetation, integrated pest management (IPM) and crop rotation. He noted that all these practices are based on improving soil health. If the carbon content in the soil can be increased, it will require fewer chemical fertilisers and interventions. Mr Gupta concluded that there is a need to reorganise supply chains to prevent wasteful production.

After the presentations, the floor was open for questions.

Mr Terry Townsend asked what could be done to have a more sustainable fashion industry, taking into account that prices for cotton and textiles haven’t increased over time. Mr Gupta replied that it would be imperative for consumers to start thinking in terms of more sustainable fashion rather than trying to focus primarily on inexpensive clothing. Ms Pepper noted that it is imperative to switch from a price paradigm into a value paradigm. There is a need to educate both brands and consumers as to why they need to invest in preferred fibres.

Mr Kaonga asked if it is possible to distinguish non-sustainable garments from sustainable garments without a label. Mr Gupta answered that it is not possible unless it is checked with data custody or by using new traceability technologies available in the market.

Mr Neal Gillen asked that in the cultivation of organic cotton, how far a field from neighbouring non-organic farms must be to avoid cross-pollination with non-organic crops. Ms Pepper answered that there are different regulations depending on the country, but on average it should be 50 feet or more. Buffer strips are also used to limit cross-pollination between organic and non-organic production systems.

Mr Mahesh Ramakrishnan asked Dr Hake how organic farmers could manage weeds in no-till farming. Dr Hake replied that no-till provides unique advantages to farmers so they can focus only on seeds at the surface. Farmers need to dry the weed seedbank down to zero in the surface of the soil and that can be done with high-residue cover crops.
Dr Serunjogi Lastus asked if Olam plans to implement the programmes that are currently being conducted in some West African countries to other cotton-growing countries in East Africa like Uganda. Mr Gupta answered that there is a lot of work that can be done in several cotton-producing countries in Africa. He noted that Olam works on building scale. In that order, Uganda might not be a priority for the organisation but there could be a possibility for reassessing the potential to scale up the operation in that country.

Mr Vibhu Nath asked what the ICAC can do to promote the usage of sustainable cotton in textile apparel to regain the market share that cotton has been lost to man-made fibres (MMFs). Mr Usman, ICAC Head of Textiles, replied that cotton and MMFs are the major textile fibres in the world. However, cotton has a huge advantage over MMFs as cotton is more sustainable and also biodegradable.

The Chair thanked all the presenters and closed the First Open Session at 9:55 am.

Second Open Session
Labelling – What is the real story about my T-shirt?

10:00 am to 12:00 pm (GMT-5),
Tuesday, 7 December 2021

Chairman: Mr. Azeez Syed, International Cotton Association – ICA

The Second Open Session ‘Labelling – What is the real story about my T-shirt?’ was chaired by Mr Azeez Syed, Past Immediate President of the International Cotton Association and Senior Vice President, Olam Americas Inc. The Chair explained that in 2019, the ICAC Standing Committee agreed that the ICAC’s Private Sector Advisory Panel (PSAP) would be able to present a session of its choice at each Plenary Meeting, covering issues that specifically affected the private sector. In 2020, the members of the PSAP selected the topic ‘Labelling’ as its choice of subject for discussion for the 2021 Plenary Meeting. He added that there are a number of unanswered questions that surround labelling — for example, what should a label cover to inform the public more about what they are buying, how issues such as sustainability be addressed through labelling or how can a label be indicative of a better and more transparent supply chain; any innovative ways that could be employed into labelling so that some of the above-mentioned issues can be answered just by a quick glance at the label?

Mr. Jesse Daystar, chief Sustainability Officer, Cotton Incorporated,
The first speaker, Mr. Jesse Daystar, chief Sustainability Officer, Cotton Incorporated, talked about ‘Data-Driven Labelling: Limitations and Opportunities’ in his presentation. He discussed Cotton Incorporated’s data describing consumer concerns around sustainability with the top environmental concerns being climate change; water scarcity; air pollution; ocean waste; land and waste management; and population growth. He emphasised how can labelling be done properly and what types of rules and science should be followed for it.

Prof. Ingun Grimstad Klepp, Consumption Research Norway, Oslo Metropolitan University
The second speaker, Prof. Ingun Grimstad Klepp, Consumption Research Norway, Oslo Metropolitan University, discussed whether we know enough about apparel and sustainability to develop a simple, trustworthy, equitable and science-based labelling system.

She indicated that we are in the middle of an explosion. Today, more items of clothing are produced than we need which means that each of them is used less. In this increase, the production using synthetic fibres has been increasing since the 1970s, whereas the production of natural fibres has remained stable over the decades.

She spoke about the EU’s new policy on Product Environmental Footprint (PEF). She indicated that this system has various shortcomings, for example:

The PEF doesn’t consider the problem of microplastics, making the PEF system biased towards synthetic fibres.

The PEF system doesn’t consider the usage base of clothing, meaning that it takes at par clothes that are used once and clothes that have been used multiple times.

Ms. Dorothy Lovell, Policy Advisor, Organisation for Economic Cooperation and Development (OECD)
The third speaker of the session was Ms. Dorothy Lovell, Policy Advisor, Organisation for Economic Cooperation and Development (OECD). She covered the topic of due diligence for responsible supply chains in the garment and footwear sector – the role of product labels. She talked about the due-diligence guidance for the sector, which was finalised in 2017 and has been adopted by 49 governments. The guidance targets all the companies in the garment and footwear sector, seeking to implement OECD guidelines from raw material producers to retailers. She further highlighted that the guidance outlines six steps of due diligence and that label can be helpful for the companies. She mentioned that OECD sees a gap where more can be done with respect to different initiatives based on their scope, expertise and the extent to which they are aligned with the OECD due-diligence guidance. To rectify this, OECD had also prepared an alignment assessment process.

Ms Fabia Pryor, Brand Community and Impact Manager at Country Road
The fourth speaker of the session was Ms Fabia Pryor, Brand Community and Impact Manager at Country Road who talked about ‘Biodiverse, Local and Verified: Country Road’s Approach to Cotton’. She pointed out that 76% of Country Road members want to know the origins of the materials they use which puts more pressure on brands to share the correct story of their raw materials with customers.

Mr. Michael Wessely, Co-Founder and COO of SheepInc.
The fifth speaker of the session was Mr. Michael Wessely, Co-Founder and COO of SheepInc., who spoke on ‘Future Positive knitwear, Reconnecting Consumers through Technology’. He discussed how can brands, suppliers and customers can come together to provide more insight into the global fashion industry and thereby decarbonise the supply chain. He added that his brand, Sheep Inc, has created an integrated digital supply chain solution that offers 100% visibility to custom-
ers and brands and has created fashion’s first naturally ‘carbon-negative’ supply chain.

He said that the fashion industry currently accounts for 1.2 billion tonnes of CO2, which will increase up to 60% by 2030. Further, while more than 100 billion items of clothing are produced every year, 25% of them remains unsold. The company succeeded in establishing a carbon-negative supply chain by employing carbon-negative methods for each sector. Starting from regenerative farms in New Zealand for raw materials, sourcing it through Italy’s first B-Crop certified textile mill, spinning it by using no harmful chemicals — manufacturing it by using zero-waste, whole-garment technology running on solar power — and finally by giving customers full visibility of this process.

**Ms LaRhea Pepper, Co-Founder and CEO of Textile Exchange**

The last speaker of the session was Ms LaRhea Pepper, Co-Founder and CEO of Textile Exchange, who spoke on ‘Consumer Engagement: Greenwashing or Education? The Truth in a Label’. She explained the goal of Textile Exchange: enabling the textile industry to account for the environmental impact of their products by using life cycle assessments. These models are a source of uncertainty in itself.

A delegate said that labelling and claims can help to leverage the farmer’s voice and asked how labelling could benefit producers? Ms. Pepper replied that leveraging the farmer’s voice is one way to explain what they have witnessed and has benefitted them.

When asked what sort of labelling scheme she would envision to reduce the environmental footprint of clothes and textiles, Prof Klepp suggested that the date of the manufacturing on the garment should be visible so a consumer can know how old a garment is, the content of the material used and guarantees as to how long can the garment be used for. Ms Lovell added that from due diligence prospective, the label should identify all severe risks in the sector.

The Chair, Mr Syed, thanked all the presenters and closed the session.

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**Third Open Session**

**Technical Session:**

**Advances and Challenges of Hybrid Cotton Technology**

08:00 am to 10:00 am (GMT-5),
Wednesday 8 December 2021
Chairman: Dr. Muhammad Ali Talpur, Vice President, Pakistan Central Cotton Committee (PCCC), Pakistan

**Topic: The Hybrid Cotton Revolution in India**

**Speaker: Dr M. Ramasami, Chairman of Rasi Seeds, India**

Dr Ramasami explained that cotton is one of the most important cash crops in India, which accounts for about 37.5% of the world’s cotton area and 26% of the world’s cotton production. The sowing window in India extends over five months from April to August. Cotton is cultivated in seven agroclimatic regions that are comprised of five different soil types. More than 65% of Indian cotton is cultivated under rainfed conditions. Nearly 72% of Indian cotton area has shallow light soil conditions, most of it under rainfed conditions, because of which the productivity is low to medium. The world’s first commercial cotton hybrid was released way back in 1970 by Dr CT Patel from Cotton Research Station, Navsari Agricultural University, Surat. Subsequently, Dr Ramasami explained that hybrid cotton cultivation in India gained momentum owing to high yield potential and wider adaptability. Currently, Bt hybrids occupy more than 98% of India’s cotton area. Compared to open pollinated varieties, hybrids were found to possess better adaptability under diverse cotton-growing environments. Hybrids are comparatively superior in early vigor and establishment under rainfed conditions resulting in better productivity than varieties. Dr Ramas-
sami said that hybrids are highly responsive to better crop-management practices. Research showed that combining multiple traits for biotic and abiotic stress tolerance makes higher yield and better fibre quality possible in hybrids. Cotton seed production in India is carried out in 58,000 hectares in five states with eight major seed production centres. About 120,000 farmers are involved in cotton hybrid seed production with an average seed productivity of 500 kg/ha. Currently, India has reached a plateau in cotton productivity due to a wide range of factors. Dr Ramasami stressed that there is an urgent need to break the yield barrier. This can be achieved through creating genetic variability by exploiting wild relatives and exotic land races. It is important to develop hybrids with biotic/abiotic stress tolerance, short duration with high yield, better fibre parameters such as extra-long staple and strong fibre strength. Hybrids amenable for mechanization and mechanical picking enhance productivity.

Questions and Answers:

Hybrid cotton has been grown in India since 1970 with constant improvements. However, cotton productivity has stagnated at about 500 kg/ha despite hybrid technology and Bt-cotton. Have the hybrids lost their potential or Bt lost its efficacy?

New hybrids are released every year. Hybrid cotton has not lost its vigour but the pink bollworm has developed resistance to Bt toxins.

Can India increase its productivity by shifting to varieties from hybrid cultivation?

In India, due to the wide range of cotton growing conditions, adaptability to diverse environments will much better in hybrids than variety. About 65% of the cotton growing area comes under rainfed conditions so hybrid vigour will have better establishment and will yield more than variety.

Is it true that yields under irrigated conditions fare better than rainfed, especially for (Bt) hybrid cotton?

Hybrids yield 30% more than varieties even under rainfed conditions.

What is the per-kg cost of production of cotton hybrid seed in India through conventional methods and using cytoplasmic male sterile (CMS) technology?

The production cost of cotton hybrid seed is 8$ per kg of seed. We are not using CMS-based lines for seed production, but we are using genetic male sterile (GMS) based lines.

Cotton yield in India ranges between 340 and 510 kg/ha. What is the proportion of farmers who get 510 kg/ha and those who get 340 kg/ha?

Farmers who get more than 500 Kg yield per hectare comprise about 35% and farmers were get below 500 kg per hectare constitute about 65%. Low yields are due to rainfed and poor soil conditions.

What is the potential yield of those hybrid cotton varieties?

The potential yield of seed-cotton in irrigated conditions is 1500 kg/acre and 400 to 600 kg/acre in rainfed conditions. This is applicable to hybrids.

Topic: The Future of Organic cotton, GM Cotton and Hybrid Cotton
Speaker: Dr Yusuf Zafar, Former Chairman of Pakistan Agricultural Research Council (PARC), Islamabad

In his presentation, Dr Zafar made comparative analyses of three types of prevailing farming systems in cotton-producing countries. Cotton is a unique crop with major contributions in food, feed and fibre (3 Fs) of human need. The usage of GM cotton is the most prevalent in the top five major cotton producers whereas a hybrid cotton system is now mostly restricted to India and a few other countries. The demand for organic cotton as ‘nature-plus technology’ is gaining importance and its growth is now in double digit. However, Dr Zafar said there are many challenges associated with adopting any of the three systems, either alone or in combination. The major thrust should be to achieve higher productivity of lint (natural fibre-NF) with reduced production costs to compete with man-made fibres (MMF). The approach of 3Ps — Profitability for People (farmers to consumers in field to fashion value chain) by taking care of this Planet — is the most desirable approach to achieving sustainable development goals (SDGs) to mitigate the negative effects of climate change.

Questions and Answers:

African soils are less exploited and chemical usage is less by default. Will African countries lead organic cotton production?

There are opportunities for organic cotton, but for technologies such as hybrid cotton, there could be challenges due to high seed production costs.

How serious is the effect of gene flow from GM cotton to the environment? Have Pakistan and India started to notice an effect on biodiversity?

So far there have been no serious reports or negative effects on biodiversity.

How can we keep sustainability in cotton production with GM cotton as insects and weeds are getting resistant to these GMOs?

We will have to keep pace with technological improvements and deploy them as and when new challenges arise to ensure sustainability.

Topic: Bt Varieties for Increasing Cotton Yields under Rainfed Ecosystem in India.
Speaker: Dr HB Santosh, Scientist (Plant Breeding), ICAR-CICR, Nagpur, India

Dr Santosh began by saying that Bt cotton was developed as an alternate strategy to the hazardous insecticides previously used to circumvent bollworm in cotton. In contrast to other countries, Bt technology was introduced to India exclusively in the form of Bt hybrids. Even today, with more than 90% of planted area under Bt hybrids, cotton productivity in India is low compared to the world average (>750 kg/hectare). Cotton yields in India have stagnated at around 500 kg/ha for the past 15 years. He stated that one of the causes of this productivity stagnation is deployment of Bt technology in the form of Bt hybrids in rainfed conditions, which accounts for more than 65% of the cotton area in India. Generally, Dr Santosh explained, hybrids possess high vigour and demand more inputs. The majority of the popular Bt hybrids are of long duration that suffer moisture stress at the boll formation stage due to poor water retention in the shallow soils in rainfed regions. Productivity enhancements in India can come from yield improvement in rainfed ecosystems through the development and deployment of Bt cotton varieties. In this regard, a dedicated transgenic backcross breeding programme was initiated in 2006 using popular elite varieties chosen from different agro-ecological regions of the cotton growing zones. Consequently, a total of 11 Bt varieties have been released and notified until now for commercial cultivation in different cotton growing zones of India. The Bt varieties can provide higher yields with an option of high-density planting apart from providing better protection against bollworms.
due to presence of the transgene in homozygous condition. The varieties are less input-demanding and more climate-resilient. They also usher seed sovereignty to farmers because the seed of these varieties can be saved for re-use next year. These released Bt varieties offer tolerance against sucking pests at early growth stages thus reducing the cost of cotton cultivation with environmental benefits. Economic analysis has revealed that the benefit to cost ratio was 2.81. Field demonstrations in rainfed conditions have shown 9% to 18% yield increase with the ICAR-CICR Bt varieties over the BG II hybrid of farmers’ choice. In conclusion, Dr Santosh said that these released Bt varieties and promising early-maturing, jassid-tolerant Bt varieties, which are currently in the pipeline, can help India achieve better productivity, profitability, and sustainability of cotton production especially in rainfed regions and on marginal soils.

Questions and Answers:

What kind of efforts are being made by Indian government to popularize and promote the Bt varieties?

The ICAR-CICR is undertaking rigorous efforts to establish collaborations for seed production and marketing of Bt varieties with many public and private organisations based in states where the majority of cotton area is under rain-fed ecosystems, with a target to promote and upscale adoption of Bt varieties in a target of nearly 30% of rainfed area under cotton.

In developed countries, there is a strong producer-led effort when it comes to adopting technologies. How is ICAR involved at the grassroots level?

Indian agricultural extension agencies have been actively involved in technology transfer through an extensive network and are largely successful in ushering changes into the agricultural sector. A ‘Public-Private-Partnership’ mode is also being explored as detailed in the presentation, apart from demos on farmers field and extension programmes from the institute.

Topic: Will hybrid cotton be suitable for rainfed Africa?

Speaker: Prof. Emeritus Andrew Paul Gutierrez. Ecosystem Science, University of California, Berkeley, CA; Center for the Analysis of Sustainable Agricultural Systems (CASAS Global), Kensington, CA

Dr Gutierrez said the question implied by the title ‘Will hybrid cotton be suitable for rainfed Africa?’ can be answered only qualitatively and is based on a holistic analysis of the experience of hybrid Bt cotton implementation in India, augmented with parallel insights gained from prior pest disasters and solutions in California that are applicable to India and likely Africa. Agroecosystem analyses based on detailed, weather-driven, physiologically based models of cotton growth and development, and the dynamics of its key pest — pink bollworm — proved critical in analysing hybrid Bt cotton production in India. The presentation posits that before implementing any new technology in agriculture (insecticides, hybrids, GMOs, etc.), we need to: (1) Clearly identify the problem that the technology targets; (2) determine if the technology is needed; (3) estimate the costs and the benefits of the technology to farmers; (4) anticipate unwarranted eco-social consequences; and (5) propose alternative technologies. The presentation questions the claims:

• That Bt hybrid cotton was a grand success in India based on the meagre increases in yield;
• the introduction of hybrid Bt cotton to solve an insecticide-induced problem with ‘American’ bollworm;
• the high costs of the hybrid and Bt hybrid technologies;
• insecticide use continued and increased to pre-hybrid Bt cotton levels but now targets sucking insect pests (such as whitefly) not controlled by Bt cotton;
• resistance to Bt toxins is increasing in pink bollworm; and
• the general economic unsustainability of the current low-density, long-season rainfed hybrid Bt cotton technology.

Dr Gutierrez said that the analysis shows how rain-fed, non-GMO, non-hybrid, short-season, high-density cotton varieties as developed by the Central Institute for Cotton Research (CICR) could double yields and farmer income; avoid pink bollworm infestation; reduce insecticide use and induced pest outbreaks; and lower cotton-farmer suicide numbers. To answer the question posed regarding rainfed hybrid cotton in Africa requires similar sound analysis, he explained.

Questions and Answers:

Can moisture stress due to lack of irrigation explain the stagnation of yield levels in India when compared to world average yields?

Yes, soil moisture is a critical component in rainfed farming. Moisture deficiency does impact yields negatively.

Given that we have American bollworm — which is still a major pest in India — and Bt is still quite effective against them, why is that non-GM varieties can be better than GM varieties for India?

Deployment of Bt-technology depends on the pest status. Sometimes there are misconceptions about some pests being of major importance. Pests can be induced by pesticides too. Therefore, the current pest status of American bollworm needs to be determined before exploring the need for deployment of cotton.

Many studies have found that Bt cotton is suitable for irrigated cotton with high-input conditions. Francophone countries in Africa grow cotton under rainfed conditions with low inputs. Will Bt technology still be a viable solution to enhance yields?

Studies will have to be conducted in Africa for a proper assessment.
World Cafe
Challenges and Opportunities for Sustainability

10:10 am (GMT-5) to 11:10 am, Wednesday 8 December 2021
Chairman: Mr Mike McCue, ICAC Communications Director

Mr McCue welcomed attendees and explained the structure and purpose of the World Cafe, which is designed to be much more interactive than traditional sessions. Ten different moderators held their own roundtable discussions prior to the meeting then shared the highlights from their discussions:

- At his English-speaking table, Mr Allan Williams of the Cotton Research & Development Corporation discussed implementing a global, common sustainability measurement system; whether it is possible to convey the sustainability metrics to the fabric a consumer purchases; and strategies to score and label blended fabrics.
- Mr Alvaro Moreira of the Better Cotton Initiative conducted his roundtable in Portuguese and addressed the main elements of cotton sustainability; what metrics should be adopted; and how the industry can better support farmers.
- Dr Bruno Bachelier of CIRAD, whose roundtable was held in French, discussed the challenges of measuring sustainable production systems; what stakeholders are responsible for sustainability; indicators of soil health; and social sustainability.
- Mr Manish Daga of CottonGuru conducted his roundtable in Hindi and discussed the responsibilities of stakeholders, specifically addressing who those stakeholders are, as well as the impact of sustainable production practices on climate change.
- Mr Mark Messura of Cotton Incorporated held a roundtable in English; topics included what people in the cotton production and value chains are most vulnerable; how to measure sustainability; and how to incorporate a positive social impact into cotton production and processing.
- Dr Mohamed Negm of ICRA organised a roundtable in Arabic, in which participants focussed on why all sectors of the supply chain are seeking greater sustainability; what sustainability means in the context of climate change; and the three main pillars of sustainability (economic, environmental and social).
- Dr Robert Jou of the Taiwan coordinated two roundtables in Chinese and the group focussed on stakeholder responsibilities; the meaning of economic sustainability; climate change; and how to score sustainability, traceability and labelling.
- Mr Marco Mtunga of the Tanzania Cotton Board convened a table of eight participants that concentrated on the need for small holder farmer training; the engagement of retailers with their suppliers; and a scheme in which all sectors of the cotton supply chain share in the benefits of sustainability.
- Dr Marcelo Paytas of INTA convened nearly 20 individuals for his discussion in Spanish. Among the topics of interest were the need to leverage the media to communicate clearly with consumers; the importance of developing common measuring systems for benchmarking and comparison; and how to overcome challenges including climate change; water availability; obsolete machinery and the difficulty in providing technical training and funding for inputs to small holder farmers.
- Professor Oybek Kimsanbaev of Volgograd University, whose table spoke Russian, emphasised the importance of actionable science and data in cotton industry development; as well as strategies for protecting and improving the soil quality in Russia and Uzbekistan.

During the Q&A session:

Dr Bachelier was asked how more people could be made aware of the indicators from the ICAC’s Expert Panel on Social, Environmental & Economic Performance (SEEP). He responded that indeed, SEEP indicators should be better known throughout the industry and added that while not all indicators are useful in Africa, they are working to make them better-known through CIRAD, the French agricultural research and cooperation organisation.

When asked what the level of stakeholder awareness was regarding climate change, Mr Daga said that the farther down the supply chain they looked, the less aware they found people were. Farmers seem to be aware of the growing risk, he explained, but retailers and brands knew very little and consumers even less — something that should serve as a wake-up call for the cotton industry. Dr Negm also replied, warning that if detailed information isn’t provided to consumers on the labels of textile products, they simply won’t buy them in the future. Even indirectly, he concluded, it is the consumer who will be driving all other stakeholders to take action.

When asked about the status of stakeholder awareness in the cotton supply chain, Prof Kimsanbaev replied that there is a critical need to disseminate information more reliably because many cotton growers in Central Asia are unaware of the Better Cotton Initiative and other industry standards.

Dr Paytas, when queried as to why not all Latin and Caribbean countries were part of a formal sustainability programme, said that the feeling amongst the members of his table was that the current initiatives were less focussed on certain countries, such as those that have low productivity in the field. He added that the industry as a whole needs to improve its networking and collaboration between associations to benefit small farmers and until that happens, it will be a major concern for countries in this region.

With time having expired, Mr McCue thanked all of the participants and closed the session.
Closing Session

for all the participants

11:10 am to 11:20 (GMT-5),
Wednesday 8 December 2021
Chairman: Mr Anshul Sharma, Chairman of
the ICAC Standing Committee

The Secretary General, Mr Kai Hughes, thanked all the participants for their active discussions which made the 79th Plenary meeting a success. He extended his gratitude to the members of the Secretariat, who had worked diligently behind the scenes and to the interpreters who faced the challenges of sometimes-faulty technology.

This virtual Plenary Meeting highlighted the importance of technology and had enabled the ICAC to focus on the Plenary Meeting structure by selecting the most pressing and important topics of interest for all the participants for delivery in half the time usually dedicated to in-person Plenary Meetings. The sessions on hybrid cotton and labelling generated vigorous discussion and debate, the latter showing the value of including the private sector in the Plenary Meeting moving forward. As a result of the virtual format, the World Cafe was able to be conducted flexibly and reach a more diverse audience than traditional Plenary Meeting sessions. All those elements will serve as a foundation for future meetings. He also mentioned that given the continued uncertainty around the public health situation, he was recommending to the Steering Committee to hold another virtual Plenary Meeting in 2022.

In his final remarks, the Chairman congratulated the delegates and the participants, as well as the Secretariat of the ICAC under the leadership of the Executive Director, Kai Hughes, for executing a successful 79th Plenary meeting. Despite the uncertainty around COVID and the new variant, he was looking forward to an in-person Plenary Meeting soon.

The Chair closed the session at 12:01.

Steering Committee

11:14 am (GMT-5) to 12:10 am,
Thursday 9 December 2021
Chairman: Mr Anshul Sharma, Chair of the
Standing Committee

The meeting started at 11.14 am.

1. Adoption of the Agenda
ICAC Executive Director Kai Hughes asked if anyone had any additions to the agenda. The delegate from the USA, Mr Patrick Packnett, asked whether it would be possible to discuss plans to change the drafting committee process. It was agreed to try and cover this issue if time permitted. The agenda was approved.

2. Election of the Standing Committee Officers – Working Paper 1

The Executive Director requested that the Steering Committee approve the recommendation of the Standing Committee to appoint the following:
- Mr Patrick Packnett, USA, as Chair
- HE Aly Touré, Côte d’Ivoire, as Vice Chair

The recommendation was approved by the Committee.


The Executive Director explained that three topics were considered during the Plenary Meeting:
- Regenerative agriculture: Which practices can combat climate change most effectively?
- Will cotton production be viable without government subsidies?
- The sustainability challenge of biotech genetically modified cotton.

After discussion at the Plenary Meeting, it was decided to adopt topic 1.

The Delegate from Russia, Ms Victoria Kardash, raised concerns that the subtext focuses on climate change which is not in line with the mandate of ICAC. It was suggested that this could be expanded to explore the effect of climate change on cotton revenues, production or industry development.

Chief Scientist Dr Keshav Kranthi explained that the topic would be expanded once speakers are appointed.

After some discussion, The Steering Committee approved the general topic of ‘Regenerative agriculture’ and a suggested title of ‘How Can Regenerative Agriculture Contribute to a Sustainable Cotton Industry’ was agreed. The Secretariat was entrusted to use this or a close variation of this title and to incorporate the concerns and concepts approved by the Steering Committee when designing the presentations and format of the session.


The Executive Director presented a summary of his report on the Strategic Away Day held in July. He began by summarising performance against the Strategic Plan.

Membership continues to be critical to the future of ICAC. In the last financial year, Zambia was suspended but Sudan rejoined. He said he is confident that Zambia will also return.

The Private Sector Advisory Council was formed this year to replace the Private Sector Advisory Panel. The Executive Director explained that this means the ICAC now has international, regional and national associations, with producers through to retailers and brands all under one umbrella.

Some gaps were identified in governance and he highlighted that this year there would be an emphasis on reviewing the ICAC Rules and Regulations and introducing more policies to ensure greater transparency.

A review of the staffing structure began earlier this year and four new roles were created. Dr Keshav Kranthi became Chief Scientist; we appointed Kanwar Usman as the new Head of Textiles and Data Scientist Matthew Lookey replaced the old Statistician position. A part time Regional Coordinator, Emmanuel Mukua, was appointed on a trial basis, addressing issues on the ground in South and Southeast Africa.

The Executive Director summarised the key partnerships that we have developed and the importance of these partners when delivering projects.

He added that outreach and promotion were strong, partly due to the continued growth of World Cotton Day, and said the ICAC will be working closely with CIRAD to set up a regional research network for West Africa.

The Committee was told finances are healthy due to extra funds from projects and that while
assessment fees continue to be an issue, the financial impact is lessened because projects are bringing in revenue.

The Executive Director said the Data Scientist is exploring better technologies that could improve the ICAC’s databases. The Soil and Plant Health app will be available in 2022 and the Virtual Reality Cotton Training Programme will also be available free of charge to all Members.

He pointed out that 80% of objectives identified in the Strategic Plan were achieved despite the impact of the pandemic. During the Strategic Away Day, attendees also discussed:

- The ICAC value proposition,
- The Plenary Meeting and
- How to engage with delegates in meetings.

As a result of the discussions, he explained, Coordinating Agencies will be invited to meetings along with delegates beginning in January 2022; the number of Standing Committee meetings will be reduced to three and administrative items will be dealt with outside the meeting when practical. An attendance summary will be available at the end of each year.

The delegate from Russia asked why the next Plenary Meeting will be virtual when in-person meetings are much more inclusive. The Executive Director replied that we do not have a willing host country and it is likely that there will still be some uncertainty due to the pandemic. As planning begins a year in advance, he explained, we would need a host country in place now to hold an in-person meeting in 2022.

5. Uncollected Assessments of the ICAC Members – Working Paper 4

The Executive Director drew the attention of the Committee to working paper 4. As of 8 December, 17 governments have not paid their assessment fees and $1,182,474 is outstanding. There is a particular concern when a country has more than one year outstanding as they are at risk of suspension in April. The Executive Director pleaded with countries to pay their outstanding fees to avoid potential suspension and to ensure the ICAC has sufficient cash flow.

6. Any Other Business

The Executive Director outlined the issues with holding the Drafting Committee meeting during a Plenary Meeting. It is particularly difficult to produce the draft statement and give sufficient time for delegates to review and consult prior to the Drafting Committee meeting. Furthermore, he said, there has been some discussion about reducing the length of the Plenary Meeting and including the Drafting Committee meeting makes this difficult. It had been proposed that the Drafting Committee meeting could move to the week after the Plenary Meeting. He pointed out that it would need to be a virtual meeting and would incur costs as interpreters would need to be sourced for an additional day.

The Russian Delegate expressed support for the proposal.

The Committee approved the proposal and the Executive Director was asked to investigate the process further and present his findings at the next Standing Committee meeting.

7. Renewal of the Executive Director Contract

The Steering Committee approved the recommendation of the Standing Committee for a one-year extension of the contract of the Executive Director.

There being no further comments, the meeting was closed at 12:10.

ATTACHMENTS

Working Paper 1
Election of Standing Committee Officers

Recommendation from the Standing Committee to the 79th Plenary Meeting of the International Cotton Advisory Committee

The ICAC Nominating Committee met virtually on 27 June 2021 to propose the officers for the Standing Committee for the coming year. Delegates from Egypt, Russia and the United States participated. Mr Ali Tahir served as Chair of the Nominating Committee.

The Rules and Regulations specify that when practical, the Vice Chair will be nominated to succeed the outgoing Chair.

The Chair found that there was a consensus to confirm the nomination of the current Vice Chair, Mr Patrick Packnett, USA (Deputy Administrator, Office of Global Analysis, USDA), as Chair.

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

- Rotation on as broad a geographical basis as possible.
- Adequate representation to importing and exporting countries.
- Ability, interest and participation in the work of the Committee.
- Timely payment of assessments.

Following the message circulated by the Executive Director on 18 October 2021, there was consensus to nominate HE Aly Touré, Commodities Ambassador, Côte d’Ivoire, as Vice Chair, from the end of the 79th Plenary Meeting to the end of the 80th Plenary Meeting.

Accordingly, the Standing Committee proposes the following officers to the Plenary Meeting for the period from the end of the 79th Plenary Meeting in 2021 to the end of the 80th Plenary Meeting in 2022:

- Mr Patrick Packnett, USA, as Chair
- HE Aly Touré, Côte d’Ivoire, as Vice Chair

Working Paper 2
Proposed Topics for the 2022 Technical Seminar

Recommendation from the Secretariat of the International Cotton Advisory Committee

The following topics are proposed for the 2022 Technical Seminar of the ICAC Plenary Meeting:

1. Regenerative agriculture: Which practices can combat climate change most effectively?
2. Will cotton production be viable without government subsidies?
3. The sustainability challenge of biotech genetically modified cotton

Topic 1: Regenerative Agriculture: Which Practices can Combat Climate Change Most Effectively?

Soils across the world are degrading rapidly as they are subjected to continuous erosion, chemical pollution, decarbonisation, desertification and loss of fertility and biodiversity. Agricultural scientists have issued warnings that unless proactive measures to build and protect soil organic matter, soil health and soil fertility are implemented, within 50 years mankind could lose the capability to feed and clothe the world and combat the ill effects of global warming. The technical seminar will discuss the recent studies on regenerative agricultural practices and farming systems and their impact on cotton production practices and its value chain.
Topic 2
Will Cotton Production be Viable without Government Subsidies?
Many governments provide input subsidies, price support, crop insurance, schemes to reward exports and encouragement for domestic procurement in cotton production and marketing. Subsidies not only insulate farmers from price risks, they also help to promote cotton production and foster artificial revenues. Government insurance programmes also add a protective cover against crop losses. Critics argue that direct payments to farmers and crop insurance payments within countries are less likely to impact international prices. However, government policies to reward exporters and encourage domestic procurement could favour local produce over imported cotton and impact international trade. The technical session will discuss the economic viability of cotton production across the globe in the absence of government subsidies and support. The discussions will also focus on the types of government subsidies/support that could have the highest impact on international prices and trade.

Topic 3
The Sustainability Challenge of Biotech Genetically Modified Cotton
Biotech cotton has thus far been approved in 19 countries and is being cultivated across the world for more than 25 years. Biotech cotton is commercially available for insect resistance and herbicide tolerance. Reports indicate significant economic benefits due to effective control of bollworms and weeds. Many countries have become highly dependent on biotech cotton varieties and many believe that cotton production will no longer be viable without the biotech traits. However, a few target insects and weeds have been reported to have developed resistance to Bt and herbicides respectively in recent years to threaten the sustainability of biotech cotton. Helicoverpa zea (in the USA) and the pink bollworm Pectinophora gossypiella (in India) have developed resistance. Glyphosate resistance was recorded in 13 weed species each in USA and Australia and eight each in Argentina and Brazil. Insecticide usage has been increasing constantly over the past 10 years in India, Pakistan, China, Brazil and the USA for the control of thrips, whiteflies, mealybugs, boll weevils and pink bollworms. Insecticide use for boll weevil control is a major concern in Brazil. Enhanced use of herbicides to control resistant weeds in USA and Brazil is an emerging concern. Research reports show that new cotton varieties have been developed using CRISPR and RNAi and offer promise in combating weeds, insect pests, diseases and drought. The seminar will discuss strategies to improve sustainability of the existing biotech cotton events while exploring the deployment of new technologies to enhance the endurance of biotech cotton.

Working Paper 3
Strategy Away Day – 27 July 2021
ICAC Working Group Meeting
Key Points
Introduction
The ICAC Strategic Working Group Meeting was held on Tuesday, 27 July 2021. Because of Covid-19, the meeting was held mainly virtually and in the ICAC office in Washington, DC, over a period of three hours. Delegates from the following Member governments attended:

Delegates:  
Cameron Hutchinson, Australia  
Md Salim Reza, Bangladesh  
Anshul Sharma, India  
Yolanda Goncalves, Mozambique  
Dercia Guedes, Mozambique  
Wen-Ping Hou, Taiwan  
Michael Bulwaka, Uganda  
Patrick Packnett, USA  
James Johnson, USA  
Graham Soley, USA  
Courtney Wilson, USA

Observer:  
Peter Wakefield, PSAP Chairman

Secretariat:  
Kai Hughes  
Lorena Ruiz  
Dr Keshav Kranthi  
Dr Sandhya Kranthi  
Parkhi Vats  
Alex Preston  
Caroline Tacon  
Mike McCue  
Emmanuel Mukua

Three topics were discussed in detail:
1. Assessment Fees – Developing a Value Proposition
2. Plenary Meetings – How to Maximise Value for Countries Hosting a Plenary Meeting
3. Engagement of Delegates and Performance against the Strategic Plan

The meeting was recorded and the full discussion on each subject along with supporting documentation is available in the Members area on the ICAC website.

Key points arising out of each session
1. Developing a Value Proposition
Today, as a result of Covid, more and more Member governments are failing to pay their assessment fees on time or not at all, resulting in cash-flow problems and budget deficits for the organisation. In times of adversity, it is only natural that Members will ask ‘What value do we get from membership of international organisations?’ It is readily apparent that value addition is clearly linked to the payment of assessment fees so how can we add value to membership?

The following points arose in the discussion and were in addition to the points provided by the Secretariat which appeared in the documentation:

• More engagement with the private sector
• Providing a neutral forum and being an independent promoter of key issues
• Provide more access to data
• Sharing best practices
• Working with the new PSAC to develop key criteria and guidance on key issues
• Helping countries with exposure adopt best scientific practices through research networks, etc
• Encouraging a strong and efficient global cotton economy and benefitting national interests
• Cotton demand creation
• Work toward reducing supply chain risk and vulnerabilities
• Development of the cotton sector in LDCs
• Practical application of research by ICAC
• Budget Subcommittee to explore how we can speed up the process of getting assessment fees out.
• Provide a package of information with the assessment fee notice

2. Plenary Meetings
The withdrawal of Spain as the host nation for the Plenary Meeting to be held in Seville in 2022 and the introduction of new technologies to accommodate the restrictions on travel due to Covid-19 have presented us with an opportunity to reconsider the structure, content and business model associated with Plenary Meetings.
Different models and considerations were presented to the delegates to initiate discussion; they are included in the documentation that was sent out to delegates. The following were key discussion points that arose out of this session:

- Hybrid model for conferences should be considered as it increases the amount of participation and increases the visibility of ICAC
- Must meet the needs of the host nation
- Consider private sector sponsorship to offset Plenary Meeting costs
- Reduce duplication of investments such as conference apps
- ICAC to consider what backroom support can be given to reduce costs
- No change is not an option
- Learn from the virtual Plenary Meeting this year
- Change format to accommodate the Private Sector
- Reduce length of meetings to decrease costs
- Reduce offerings that the host nation must provide in order to lower costs
- Consider formulating the Plenary Meeting’s Final Statement out of session
- Consider bringing event management in house and recruit ICAC staff members
- Change terminology for ‘observers’
- Scope for PSAC to work with Secretariat to organise Plenary Meeting
- U-shaped table only during opening session
- Consider holding the Plenary Meeting in conjunction with a national or international event or conference
- Advisory Committee meeting to be limited to half a day
- More private sector engagement required
- What can we do that others aren’t?
- Networking should be an important element of the Plenary Meeting
- Input required from the PSAC
- Nominal fee to attend virtually
- PSAC to work with the Standing Committee and Secretariat to organise meetings and select locations and work with host government to minimise costs

3. Performance and Review of Strategic Plan and Engagement of Delegates

How do we improve the engagement of Delegates in the ICAC and Standing Committee?

- Invite Coordinating Agencies
- Reduce number of meetings
- Shorten length of the meetings
- Deal with administrative matters outside of committee
- Consider merging some of the sub-committees
- Consider having a theme for each meeting
- Annual attendance summary

Review of the KPIs associated with the Strategic Review revealed that 80% plus had been achieved despite the restrictions brought about by Covid.

Actions

Suggestions about how the organisation can add value will be incorporated into a Value Proposition document as well as be implemented into the operational procedures of the organisation.

The points concerning Plenary Meetings will be considered by the PSAP and PSAC and proposals and recommendations will put forward to the Standing Committee for consideration and approval.

Recommendations on how to increase engagement will be implemented after the September Standing Committee Meeting.

Kai Hughes
Executive Director
18 September 2021

ICAC Strategic Plan 2020 - 2022

Background

At the last meeting of the Steering Committee, held during the 76th Plenary Meeting in Tashkent, Uzbekistan, on 27 October 2017, it was agreed that a Strategy Committee be formed to have oversight of the Strategic Review process and ensure that timelines and key objectives were being met. The objective of the Strategic Review is to enhance the comprehensiveness of the ICAC’s current statistical, technical, trade and policy streams of work. The Strategy Committee conducted the Strategic Review of the ICAC, leading to the creation of this Strategic Plan.

Mission

The mission of the ICAC is to assist members in fostering a healthy world cotton economy. The Committee achieves its mission by providing transparency to the world cotton market, by serving as a clearinghouse for technical information on cotton production, and by serving as a forum for discussion of cotton issues of international significance. The role of the ICAC is to raise awareness of emerging issues, provide information relevant to the solving of problems, and to foster cooperation in the achievement of common objectives. By serving as an objective statistical observer and by bringing producing, consuming and trading countries together with all segments of the cotton industry, the ICAC serves a unique role as a catalyst for constructive change.

ICAC Vital Functions

- Provide statistics on world cotton production, consumption, trade and stocks, and to identify emerging changes in the structure of the world cotton market;
- Serve as a clearinghouse for technical information about cotton and cotton textiles;
- Serve as an objective forum for discussion of cotton matters of international significance;
- Represent the international cotton industry before UN agencies and other international organisations.

Organisational and Leadership Values

Formed in 1939, the ICAC is the only intergovernmental body for cotton producing, consuming and trading countries. ICAC has a rich history as the leading provider of information about the global cotton industry and is a respected independent, analytical, objective source of statistical and technical data on cotton and cotton textiles. ICAC has a
global reach and supports networks of cotton researchers worldwide. ICAC aims to cover all aspects of the cotton value chain and does it in a cost-effective way with limited resources. ICAC raises awareness of the major challenges facing the cotton industry, such as declining market share, demand enhancement, sustainability of cotton production, developing technologies aimed at increasing productivity and reducing costs and price volatility, and strives to provide practical solutions to the effective resolution of those challenges.

**Strategic Objectives**

Strategic objectives will be focused on strengthening ICAC as a viable, relevant organisation with a strong forward-thinking analytical capacity. ICAC is the premier source of objective, science-based information on cotton that assists governments in fostering a healthy world cotton economy.

The organisation will continue to provide transparency to the world cotton market for the benefit of the private sector and the hundreds of millions of people involved in the cotton value chain. ICAC will maintain one of the strongest statistical and technical information capacities in the industry and will continue serving as a clearinghouse for sustainable cotton production technologies.

The organisation will continue developing a modern database of statistics and information, instantly accessible online by governments, the private sector, researchers, and educational facilities.

ICAC will work hard to retain current membership and add new members from major world cotton or textile economies by adding to the value of membership for the whole cotton and textile value chain. ICAC should focus on developing strategic partnerships with international and industry organisations and actively engage in cooperation with the private sector. In order to achieve challenging objectives and provide clear value to members, revenue generation and growth must be achieved, and a new membership and committee structure should be explored. Outreach and promotion goals should be developed through holistic communication strategies, as well as information technology.

The organisation will continue to serve as the major international forum on cotton, bringing together producing and consuming countries with all sectors of the cotton industry in order to address challenges and achieve practical solutions. The visibility of ICAC and its work and profile will be increased. The organisation will be coordinating and participating in international seminars and conferences, regional meetings, and research networks in order to address pressing and topical issues, such as production technologies, market shifts, fibre competition, and price-risk management. ICAC will continue to cooperate closely with industry associations, government and private organisations, research centres, universities, and the media.

ICAC will work on cotton demand enhancement and will continue to promote cotton consumption with clear messages on the sustainability of cotton production. ICAC will address the criticism on the environmental impact of cotton production, and will help to educate consumers on the environmental, social, and economic benefits of cotton production. ICAC will work with governments to encourage transparency in cotton policies and programs and to eliminate the direct government measures that distort cotton production and trade. ICAC will promote implementation of modern technologies that improve productivity and reduce costs in order to make cotton more competitive with polyester and other synthetic fibres.

ICAC will continue to serve as the International Commodity Body (ICB) for cotton, and will sponsor cotton projects not just with the Commodity Fund for Commodities (CFC) but will also aim to develop projects with other national and international groups. ICAC will cooperate with international organisations such as The World Bank, UN, FAO and UNCTAD, UNIDO, GIZ, EU and others on developing cotton projects.

The organisation will employ and retain professional, enthusiastic, disciplined, results-oriented, dedicated, creative, and innovative staff. The team will be well-remunerated and provided with job stability. The organisation will maintain strong traditions of excellence and efficiency of service to its members and to the industry, where the set goals are reached. Deadlines will be met and the budget adhered to with the strongest discipline. The accumulated experience will be passed through the generations, but the organisation will be always looking forward for opportunities to innovate.

**STRATEGIC PLAN 2020-2022**

The Strategic Plan marks the culmination of a strategic review process that began at the end of 2017. This process began by gathering inputs from stakeholders via surveys and meetings with key individuals and the various ICAC Committees, analysing the activities of other International Commodity Bodies and conducting an internal SWOT analysis amongst members of the ICAC Staff. This information was presented to the Standing Committee at a dedicated Strategic Away Day held on 12 July 2018. The Away Day was conducted by an independent consultant who started the day by reviewing key themes and shared comments that arose out of the surveys. From this, discussions took place around four key areas:

- Governance structure
- Revenue building activities
- Partnerships with member governments/international organisations
- ICAC membership structure

This was followed by a review of the organisational SWOT analysis and a discussion on how to build upon the strengths and opportunities and how to ensure sustained growth and value to members.

The Strategic Plan, attached, formed the basis of those discussions and reflected the priorities that the Standing Committee felt were important for the ICAC to achieve its aims. It should be noted that whilst many activities will necessarily need to start in year one in order to achieve completion by the end of the Strategic Plan, those requiring the highest priority are shown in red and lowest priority is shown in green.

Progress will be monitored annually against the Plan but the success of the Strategic Plan can only be judged by performance at term end. It is also important to revisit the Mission statement of the organisation as well as its Vision and Values and this will form the focus of next year’s Away Day as well as reviewing the ICAC’s progress in achieving its objectives.

The ICAC’s seven key objectives are summarised below;

**Membership**

ICAC will create a targeted approach for each identified potential member among producing and consuming countries by clearly demonstrating the value of membership, leading to increased membership during the strategic plan period. ICAC will explore and improve services provided to current members in order to achieve a 100% retention rate of its members. ICAC will explore and implement a new membership structure that includes associate membership for national and international organisations, as well as allied-sector and private-sector firms, which will lead to increasing revenue.

**Value Proposition**

ICAC will research and analyse the most prudent ways to create a sustainable value proposition to cotton consuming countries. The cotton value chain will be the focus and target for improving the value proposition
offered by ICAC to members throughout the course of this Strategic Plan.

**Research**
ICAC will develop a technical information strategy in order to strengthen its vast technical research network, increasing the capacity to produce even more objective data and statistics – including not just production, but textile processing as well. ICAC will make the quality of its data more accessible to members, partners, and the global community. ICAC will focus on developing and strengthening research networks, especially in Africa. ICAC will develop a holistic education plan and create a cotton innovation world conference.

**Partnerships**
ICAC will identify key partnership opportunities throughout the world that make the most sense and will strategically improve the ICAC. Partnerships will be identified within the UN, other international organisations, ICBs, national industry associations, private sector firms, and others.

**Governance**
ICAC will review its committee structure and determine the most appropriate structure to serve the needs of the ICAC and address major challenges: the growth and sustainability of the ICAC. Organisational regulations will be reviewed in line with the best practices of other ICBs and international organisations. A review of ICAC’s mission, vision, and values will be conducted.

**Technology**
ICAC will explore ways to utilise technology to increase its value proposition and assist in the deployment of vital information to the global market and cotton supply chain. ICAC will create a plan to deploy its information and vast expertise to provide members and the global cotton community with timely and objective data and information. ICAC will utilise modern technology for training and publication distribution.

**Finance**
ICAC will increase and preserve value-added revenue streams that will support the growth of the ICAC and provide accessible research and education. ICAC will explore new policies for the acceptance of paid advertising in publications and on the website. Growth opportunities will be explored, including associate membership of the private sector and trade associations in all sectors of the value chain. Revenue increases during Plenary Meetings and research conferences will be explored to include sponsorships and trade fairs.
**ICAC Strategic Plan 2020 through to 2022**

<table>
<thead>
<tr>
<th>Key Objectives</th>
<th>Approach/process</th>
<th>2022 Success Goals</th>
<th>2020 Priority</th>
<th>2021</th>
<th>2022</th>
<th>Owner</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Membership</strong></td>
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<tr>
<td>Identify Members</td>
<td>Create targeted approach for each identified potential member. Draw up list of all cotton producing and consuming countries; divide into those who have been members and have resigned or been suspended. Those who have never been ICAC members. Prioritize into 3 groups: good, possible, no.</td>
<td>Secure 5 new members</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>Staff and SC Members</td>
<td></td>
</tr>
<tr>
<td>Retention</td>
<td>Retention: create the approach to retain each country, explore what additional ICAC benefits would be beneficial, create strategy to communicate, reach out, build relationships and maintain.</td>
<td>100% retention</td>
<td>100% retention</td>
<td>100% retention</td>
<td>100% retention</td>
<td>Staff and SC Members</td>
<td></td>
</tr>
<tr>
<td>Value add for members</td>
<td>Determine appropriate assessment to identify needs of members. Explore various methods to utilize external assistance/guidance to craft assessment and research value propositions.</td>
<td>Completed 6 country audits</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>Keshav Kranthi</td>
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<tr>
<td></td>
<td>Conducted 3 projects in member countries</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Keshav Kranthi</td>
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<tr>
<td></td>
<td>Developed and conducted 3 production based workshops</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Keshav Kranthi</td>
<td></td>
</tr>
<tr>
<td><strong>New Membership Structure</strong></td>
<td>Review and propose variety of membership structures and benefits for private sector, associations etc.</td>
<td>New membership structure implemented resulting in increasing membership of International and national organisations and increasing revenue stream</td>
<td>Create a sub-committee on New Membership Structure. Proposal of new membership structure to include International and National Organisations</td>
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<td></td>
<td>Implementation of new structure</td>
<td></td>
<td></td>
<td>ED and SC Members</td>
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</tr>
<tr>
<td><strong>Governance</strong></td>
<td>Review ICAC Committee Structure: determine what is working/why and what is not working. Determine best committee structure to serve the needs of ICAC for the next three years of the SP.</td>
<td>Committee covers major challenges in the whole value chain</td>
<td>Proposal to the Steering Committee</td>
<td>Implementation of new structure</td>
<td></td>
<td>ED and SC Members</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review ICAC Regulations in line with current best practice with other ICPs and International Organisations</td>
<td>Revised ICAC Regulations in place</td>
<td>Proposal to the Steering Committee</td>
<td>Implementation of new structure</td>
<td></td>
<td>ED and SC Members</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review Staff Regulations in line with current best practice with other ICPs and International Organisations and best legal practice</td>
<td>Revised Staff Regulations in place</td>
<td>Proposal to the Standing Committee</td>
<td>Implementation of new structure</td>
<td></td>
<td>ED and SC Members</td>
<td></td>
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<tr>
<td></td>
<td>Review staff structure</td>
<td>New staff structure in place to reflect requirements of the Strategic Plan</td>
<td>Proposal to the Standing Committee. Budget to reflect changes</td>
<td></td>
<td></td>
<td>ED</td>
<td>Increase in budgeted salary level</td>
</tr>
<tr>
<td></td>
<td>Review Mission, Vision and Values</td>
<td>SP reviewed annually</td>
<td>Reviewed at annual review of SP</td>
<td>Annual review of SP</td>
<td>Annual review of SP</td>
<td>Staff and SC Membership</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Action</td>
<td>Expected Outcomes</td>
<td>Responsible Parties</td>
<td>Budget Notes</td>
<td></td>
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<tr>
<td>Value Proposition</td>
<td>Research and analyse ways to create a value proposition for the textile value chain. Engage with outside consultant to create and deploy the research study.</td>
<td>Recommendations and implementation of proposals.</td>
<td>Consultant's fee</td>
<td></td>
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</tr>
<tr>
<td>Partnerships</td>
<td>Identify key partnerships opportunities through the world that make the most sense and will strategically improve the ICAC. Identify key partnerships within UN organisations. Create the plan to identify partnership benefits to both sides of the relationship. Identify and prioritise target list of partnerships. Begin process of building partnership relationships. MOUs with all identified key partners. Paper to SC to identify key partners. MOU with identified key partners. MOU with identified key partners. ED and SC Members.</td>
<td>Travel budget to reflect trips to visit identified partners.</td>
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<tr>
<td>Outreach and promotion</td>
<td>Develop holistic communication strategy. Link strategy to critical elements within the strategic plan objective. Identify key messages annually linked to SP objectives. Develop publications survey for all subscribers. Identify Flagship Publications. Review relevance and number of publishing frequency of ICAC publications. Create and conduct a survey to recipient to determine satisfaction of publication, best method to receive information. Analyse survey results to determine course of action to create streamlined approach to knowledge sharing and publications. KPIs within Communications Strategy reached.</td>
<td>Communications Strategy to be approved by beginning of 2019. Communications Strategy and key messages reviewed. Annual survey. Annual survey. Staff (Mike McCue).</td>
<td>Mike McCue</td>
<td>Consider employment of Training Development Officer.</td>
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</tr>
<tr>
<td>Outreach and promotion</td>
<td>Develop Virtual Reality training course. Conduct workshops and increase number of training programmes.</td>
<td>Implementations of strategy. Programme of country audits.</td>
<td>Keshav Kranthi</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Research</td>
<td>Set up West Africa research network. First research network meeting to be held by 2020. Consult with key partners to establish research network - CIAD 7.</td>
<td>Recruit administration team. Hold meeting.</td>
<td>Keshav Kranthi</td>
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</tr>
<tr>
<td>Research</td>
<td>Strengthen existing research networks. Assume greater leadership role in identified networks to assist in oversight, direction setting as part of the strategy to reduce myth busting while improving the positive perspective of cotton and the ICAC. Increased attendance and sponsorship. Identify regional themes. Develop common governance structures. Develop 3 year plans for each regional network to include workshops and training.</td>
<td></td>
<td>Keshav Kranthi</td>
<td></td>
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</tr>
<tr>
<td>Research</td>
<td>Create the plan to leverage knowledge &amp; vast expertise to produce timely and credible facts about cotton.</td>
<td>Data from publications and participation in knowledge sharing programmes. Developers of websites and factsheets. Develop Virtual Reality training course. Conduct workshops and increase number of training programmes.</td>
<td>ED and Staff</td>
<td></td>
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</tr>
</tbody>
</table>

**Note:** The table format is used to represent the text in a structured manner. Each row corresponds to a different section or action, with the expected outcomes, responsible parties, and budget notes listed accordingly.
<table>
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<tr>
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<th>2022 Priority</th>
<th>Owner</th>
<th>Resources</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Members</td>
<td>Create target approach for each identified potential member. Draw up list of all cotton producing and consuming countries, divide into those who have been members and have not been revisited. Those who have never been ICAC members. Prioritize into Sign-up potential, possible, no.</td>
<td>Secure new members</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>Staff and IC Members</td>
<td>Membership</td>
<td></td>
</tr>
<tr>
<td>Retention</td>
<td>Retention; create an approach to retain each country, explore what additional ICAC benefits would be beneficial, create a strategic communication plan to build relationships and maintain.</td>
<td>100% retention</td>
<td>100% retention</td>
<td>100% retention</td>
<td>100% retention</td>
<td>Staff and IC Members</td>
<td>Membership</td>
<td></td>
</tr>
<tr>
<td>Value add members</td>
<td>Determine appropriate assessment to identify needs of members. Explore various methods or tools to identify areas of assistance/guidance to craft assessment and create value propositions.</td>
<td>Conducted 3 projects in member countries</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Keshav Kranthi</td>
<td>Membership</td>
<td></td>
</tr>
<tr>
<td>Value Preparation</td>
<td>Research and analyze ways to create a value proposition for the textile value chain.</td>
<td>Increased stated value to members</td>
<td>Engage with outside consultant and deploy the research study</td>
<td>Recommendations and implementation of proposal</td>
<td>Consultant</td>
<td>Value Proposition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partnerships</td>
<td>Identify key partnership opportunities through the world that make the most sense and will strategically improve the ICAC. Identify key partnerships with the UN. Create the plan to identify partnerships that are mutually beneficial for both sides of the relationship. Identify priorities and target list of partnerships. Begin the process of building partnerships relationships.</td>
<td>MOUs with all identified partners</td>
<td>Paper to SC then identify key partners</td>
<td>MOU with identified partners</td>
<td>MOU with identified partners</td>
<td>ED and SC Members</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Outreach and Promotion</td>
<td>Develop holistic communication strategy. Link strategy to critical elements within the strategic plan objectives. Identify key messages annually linked to SP objectives.</td>
<td>EKscan Communications Strategy reached</td>
<td>Communications Strategy is approved (beginning of 2020)</td>
<td>Communications Strategy and key messages reviewed</td>
<td>Communications Strategy and key messages reviewed</td>
<td>Mike McGuire</td>
<td>Outreach and Promotion</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>Strengthen existing research network. Assume greater leadership role, identify networks to assist in overseeing, direction setting as part of the strategy to reduce myth busting while improving the positive perception of cotton and the ICAC.</td>
<td>Increased attendance and sponsorship</td>
<td>Increase regional themes</td>
<td>Develop common governance structures</td>
<td>Develop new plans for each regional network</td>
<td>Keshav Kranthi</td>
<td>Research</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>Create the plan to leverage knowledge &amp; vast expertise to produce timely credible facts about cotton.</td>
<td>Increased budget performance</td>
<td>Outturn v+5% of budget</td>
<td>Outturn v+5% of budget</td>
<td>Outturn v+5% of budget</td>
<td>ED</td>
<td>Finance</td>
<td></td>
</tr>
<tr>
<td>Strategic and Annual Business Plan</td>
<td>Create the internal process for annual review and management of strategic and annual plans.</td>
<td>Annual Review</td>
<td>Annual Review</td>
<td>Annual Review</td>
<td>Annual Review</td>
<td>ED and Laura Rios</td>
<td>Strategic and Annual Business Plan</td>
<td></td>
</tr>
<tr>
<td>Value add members</td>
<td>Determine appropriate assessment to identify needs of members. Explore various methods or tools to identify areas of assistance/guidance to craft assessment and create value propositions.</td>
<td>Complete country audits</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>Keshav Kranthi</td>
<td>Membership</td>
<td></td>
</tr>
<tr>
<td>New Member Structure</td>
<td>Review and propose variety of membership structures and benefits for private sector, associations etc.</td>
<td>New membership structure implemented</td>
<td>Increase member participation</td>
<td>New membership structure implemented</td>
<td>New membership structure implemented</td>
<td>ED and SC Members</td>
<td>Membership</td>
<td></td>
</tr>
<tr>
<td>Review ICAC Committee Structure</td>
<td>Review ICAC committee structure; determine what is working/well and what is not working. Determine new committee structure to serve the needs of ICAC over the next three years of the SP.</td>
<td>Committee to review major changes to the committee structure</td>
<td>Proposal to the Steering Committee</td>
<td>Implementation of new structure</td>
<td>Implementation of new structure</td>
<td>ED and SC Members</td>
<td>Governance</td>
<td></td>
</tr>
<tr>
<td>Review staff structure</td>
<td>New staff structure in place to reflect requirements of the Strategic Plan</td>
<td>New staff structure in place</td>
<td>New staff structure in place</td>
<td>New staff structure in place</td>
<td>New staff structure in place</td>
<td>ED</td>
<td>Governance</td>
<td></td>
</tr>
<tr>
<td>Review Mission, Vision and Values</td>
<td>Review mission, vision and values</td>
<td>SP reviewed annually</td>
<td>Annual review of mission, vision and values</td>
<td>Annual review of mission, vision and values</td>
<td>Annual review of mission, vision and values</td>
<td>Staff and SC Membership</td>
<td>Governance</td>
<td></td>
</tr>
<tr>
<td>Key Objectives</td>
<td>Approach/process</td>
<td>2022 Success Goals</td>
<td>2020</td>
<td>Priority 2020</td>
<td>Priority 2021</td>
<td>Priority 2022</td>
<td>Owner</td>
<td>Resources</td>
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<tr>
<td>Identify Members</td>
<td>Create targeted approach for each identified potential member. One-up-to-date of all countries selling and consuming cotton, discussing those which have been members and those that have been suspended. Those who have never been ICAC members, research into what would be possible, possible, no.</td>
<td>Secure new members</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>Staff and SC Members</td>
<td>Membership</td>
</tr>
<tr>
<td>Retention</td>
<td>Review current membership to reach into new countries, explore what additional ICAC benefits would be beneficial, and create a strategy to manage and maintain relationships.</td>
<td>100% retention</td>
<td>100%</td>
<td>100% retention</td>
<td>100% retention</td>
<td>100% retention</td>
<td>Staff and SC Members</td>
<td>Membership</td>
</tr>
<tr>
<td>Value add for members</td>
<td>Determine appropriate assessment to identify needs of members. Explore various methods to utilize external assistance or guidance to craft assessment and research value propositions.</td>
<td>Conducted 3 projects in member countries</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>Keshav Kranthi</td>
<td></td>
<td>Membership</td>
</tr>
<tr>
<td>Research</td>
<td>Research and develop a way to create a value proposition for the textile value chain</td>
<td>Increased value to members</td>
<td>Engage with outside consultant to do a deep dive into the value chain</td>
<td>Recommendations and implementation of proposals</td>
<td>MOU with identified partners</td>
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<td>MOU with identified partners</td>
<td>Staff and SC Members</td>
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<td>Partnerships</td>
<td>Identify key partnership opportunities that would impact the textile value chain</td>
<td>Increased value to members</td>
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<td>Research</td>
<td>Identify the textile factories and strategic business opportunities</td>
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</tr>
<tr>
<td>Research</td>
<td>Identify key partnerships with the UN organisations. Create the plan of action and benefit of both sides of the relationship. Identify and prioritise key to targeted list of partnerships. Begin process of building partnership relationships.</td>
<td>MOUs with all identified key partners</td>
<td>Paper to SC to identify key partners</td>
<td>MOUs with all identified key partners</td>
<td>MOUs with all identified key partners</td>
<td>MOUs with all identified key partners</td>
<td>ED and SC Members</td>
<td>Travel budget to reflect trips to visit identified partners</td>
</tr>
<tr>
<td>Outreach and Promotion</td>
<td>Develop strategic communication strategy. Link strategy to critical elements within the strategic plan, to build relationships. Increase key messages annually linked to Strategic Action Plans.</td>
<td>Communications Strategy reached</td>
<td>Communications Strategy to be approved by October 2019</td>
<td>Communications Strategy to be approved by October 2019</td>
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<td>MIke McGuire</td>
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<tr>
<td>Research</td>
<td>Develop a GIS to communicate Strategy. Implement strategy for approved</td>
<td>Increased number of projects and programmes as per influence, interest and yields</td>
<td>Develop Technical Information Strategy for approved</td>
<td>Implementation of Strategy Programme of country audits</td>
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<td>Keshav Kranthi</td>
<td>Recruit member of additional member of staff</td>
</tr>
<tr>
<td>Strategic and Annual Business Plan</td>
<td>Develop the strategic information strategy.</td>
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<td>Finance</td>
<td>Create a list of key publications and strategies</td>
<td>Increased number of projects and programmes as per influence, interest and yields</td>
<td>Develop Technical Information Strategy for approved</td>
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<tr>
<td>New Membership Structure</td>
<td>Review and propose a variety of membership structures and services for private sector, associations etc.</td>
<td>New membership structure implemented in key global markets</td>
<td>Create a new membership structure to include International and National Organisations and increasing revenue streams</td>
<td>Implementation of new structure</td>
<td>Implementation of new structure</td>
<td>Implementation of new structure</td>
<td>ED and SC Members</td>
<td>Increase in budgeted salary level</td>
</tr>
<tr>
<td>Review ICAC Committee Structure</td>
<td>Review ICAC Committee Structure, determine what is working, why it is working, and what is not working; Determine key committees to serve the needs of the ICAC over the next 3 years of the SP.</td>
<td>Committee cover major gaps in the previous year of the SP</td>
<td>Proposal to the Steering Committee</td>
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<td>Review Staff Structure</td>
<td>New staff structure in place to reflect membership of key stakeholders</td>
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<td>Review Mission, Vision and Values</td>
<td>SP reviewed annually</td>
<td>SP reviewed annually</td>
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<td>Staff and SC Members</td>
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<tr>
<td>Department</td>
<td>Project</td>
<td>Key Actions</td>
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<tr>
<td>Research</td>
<td>Create research plan</td>
<td>Identify key partnerships within International organisations, develop partnerships with National Associations. Create plan to identify and prioritise partnerships.</td>
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<tr>
<td>Finance</td>
<td>Increase business plan revenue streams to $200K</td>
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<tr>
<td>Outreach and Promotion</td>
<td>Increase in number of publications, increase in number of citations, increase in number of downloads.</td>
<td>Analyze survey results to determine course of action to create streamlined approach to knowledge sharing and publications.</td>
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<td>Research</td>
<td>Develop holistic education plan that supports the SP objectives and increases value to members, global networks and more through the use of technological delivery of education/alimentive content, areas and analysis and provide learning through fees and subscriptions.</td>
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<td>Research</td>
<td>Review the relationship &amp; roles of ICAC &amp; ICRA</td>
<td>Review ICAC &amp; ICRA approvals of new structure and approval of new structure to be held by 2020.</td>
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<td>Technology</td>
<td>Research feasibility of creating App that will bring in sustained revenue for the following: Soil Health, Environmental Sustainability and Pest Management.</td>
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</table>
Closing Session
for all the Members

11:10 am to 11:40 (GMT-5),
Thursday 9 December 2021

Chairman: Mr Anshul Sharma, Chairman of
the ICAC Standing Committee

The Executive Director congratulated the
new officers of the Standing Committee: Mr
Patrick Packnett from the USA as Chairman
and Mr Ali Touré from Côte d’Ivoire as Vice
Chair. He extended a warm thank you to
outgoing Chairman Mr Anshul Sharma for
his help and support during the past year
and conveyed his gratitude to all delegates
for their work at the drafting group and their
participation in the 79th Plenary Meeting.
On behalf of the Standing Committee, the
Chairman commended the Secretariat for
its hard work in meeting the expectations
of the cotton industry and for maintaining
a vibrant organisation in the face of one of
the greatest challenges humanity has ever
experienced over the past 2 years. He said it
was a privilege to work with the ICAC team
and was confident that the organisation will
have a bright future under the leadership of
the Executive Director. He welcomed the
new officers of the Standing Committee and
thanked his colleagues in the Committee for
their support during the past months.
The Chair closed the session at 12:26 pm.

DOCUMENTS

1. Report of the Chairman of the Standing Committee
2. Report of the Executive Director
3. COTTON: Review of the World Situation, September 2021
4. World Cotton Statistics – December 2021
5. World Textile Demand – December 2021
6. World Cotton Trade – December 2021
7. Cotton Data Book – December 2021
8. THE ICAC RECORDER - September 2021
10. Directory

WORKING PAPERS

I. Election of Standing Committee Officers
II. Topic of the 2022 Technical Seminar
III. Strategic Away Day
IV. Uncollected Assessments of Member Governments of ICAC
# OFFICIAL DELEGATIONS

## Argentina
- **Mr Luis Ramon Almiron**
  Ministry of Agriculture, Livestock and Fisheries
  Argentina
- **Mr Jorge Garcia**
  Ministerio de Agricultura, Ganadería y Pesca
  Argentina
- **Mrs Cecilia Marincioni**
  Embassy of Argentina
  United States
- **Mr Jose Molina**
  Embassy of Argentina in the United States
  United States
- **Mr Mario Mondino**
  INTA
  Argentina
- **Dr Marcelo Paytas**
  INTA
  Argentina
- **Mr Agustin Perez Andrich**
  Ministry of Agriculture, Livestock and Fisheries
  Argentina
- **Ms Diana Piedra**
  INTA
  Argentina
- **Mr Fabio Wyss**
  INTA
  Argentina
- **Ms Yanina Yalungo**
  Ministry of Agriculture, Livestock and Fisheries
  Argentina

## Bangladesh
- **Mr Md. Akhteruzzaman**
  Cotton Development Board
  Bangladesh
- **Mr Zafar Ali**
  Cotton Development Board
  Bangladesh
- **Dr Md. Kamrul Islam**
  Cotton Development Board
  Bangladesh
- **Dr Md. Gazi Golam Mortuza**
  Cotton Development Board
  Bangladesh
- **Dr Md. Fakhre Alam ibne Tabib**
  Cotton Development Board
  Bangladesh

## Brazil
- **Mr João Pessa**
  AMPA
  Brazil
- **Mr Savio Pereira**
  Ministry of Agriculture, Livestock and Food Supply
  Brazil
- **Mr Andrew Macdonald**
  AMCON Consulting
  Brazil

## Burkina Faso
- **Mr Wilfried Yameogo**
  Sofitex
  Burkina Faso
- **Mr Lassana Kargougou**
  Sofitex
  Burkina Faso
- **Mr Ousseini Kabore**
  Sofitex
  Burkina Faso
- **Mr Lassana Belem**
  Faso Cotton
  Burkina Faso
- **Mr Kalo Millogo**
  UNPCB
  Burkina Faso

## Australia
- **Mrs Tamara Dadswell**
  Department of Agriculture, Water and the Environment
  Australia
- **Mr Stephen Hodge**
  Department of Agriculture, Water and the Environment
  Australia

## Chad
- **Mr Ibrahim Malloum**
  Cotton'Tchad
  Chad
- **Mr Komla Tallaki**
  Chad

## Côte d'Ivoire
- **Dr Nogbou Ferdinand Amangoua**
  Centre National de Recherche Agronomique (CNRA)
  Côte d'Ivoire
Mr Mamadou Berte  
Cotton and Cashew Council  
Côte d’Ivoire

Mr Kouadio Kra Norbert Bini  
National Agricultural Research Centre (CNRA)  
Côte d’Ivoire

Dr Adama Coulibaly  
Cotton and Cashew Council  
Côte d’Ivoire

Mrs Assita Chérie Coulibaly Epouse Traore  
FIRCA  
Côte d’Ivoire

Mr Moulokoni John Anderson Ehouman  
FIRCA  
Côte d’Ivoire

Mr Simplice Gue  
Cotton and Cashew Council  
Côte d’Ivoire

Mr Assi Achy Hervé  
Embassy of Côte d’Ivoire  
Côte d’Ivoire

Mr Gabésongon Kone  
Cotton and Cashew Council  
Côte d’Ivoire

Dr Brou Julien Kouakou  
FIRCA  
Côte d’Ivoire

Dr Malanno Kouakou  
Centre National de Recherche Agronomique (CNRA)  
Côte d’Ivoire

Dr Kouadio Emmanuel N’Goran  
Centre National de Recherche Agronomique (CNRA)  
Côte d’Ivoire

Mr Essoi N’Guessan  
National Agricultural Research Centre (CNRA)  
Côte d’Ivoire

H.E.M Aly Toure  
Permanent Representation of Côte d’Ivoire to Intl Commodity Organizations  
Côte d’Ivoire

Dr Abeer Samir Arafa  
Cotton Research Institute  
Egypt

Dr Adel Abdel Azim  
Agricultural Research Council  
Egypt

Mr Ahmed Refaat El Asklny  
Ministry of Commerce  
Egypt

Mr Walid El Sadany  
General Committee for Cotton Trade inside  
Egypt

Mr Mohamed Mahmoud El-Garhy  
Cotton Exporters Union  
Egypt

Mr Ahmed Khaled Elbosaty  
Modern Nile Cotton Co.  
Egypt

Mrs Rabab ElGwily  
Egypt Embassy in Washington DC  
EU

Mr Aly Elkabeer  
Ministry of Trade  
Egypt

Mr Mashhout Janab Ismail Behairy  
Egypt

Mr Mohamed Khedr  
CATGO  
Egypt

Dr Mohamed Abdel Meguid  
Cotton Council  
Egypt

Dr Hesham Mosaad  
Cotton Research Institute  
Egypt

Mr Ahmed Moustafa  
Holding Company for Cotton and Spinning and Weaving  
Egypt

Ms Monika Mullerova  
Ministry of Industry and Trade of the Czech Republic  
EU

Ms Kerstin Roesberg  
German Federal Ministry for Economic Affairs and Energy  
EU

Mr Régis Meritan  
EU Commission Directorate-General for International Partnerships (DG INTPA)  
EU

Mr Léonard Mizzi  
EU Commission Directorate-General for International Partnerships (DG INTPA)  
EU

Ms Agnès Capony  
European Commission, Delegation in Washington DC  
EU

Ms Zoe Druilhe  
EU Commission Directorate-General for International Partnerships (DG INTPA)  
EU

Mr Anshul Sharma  
Indian Embassy  
India

Ms Naomi N. Kamau  
Ministry of Agriculture Livestock Fisheries and Cooperatives  
Kenya

Mr Alex Mungai  
Agriculture and Food Authority (AFA) - Fibre Crops Directorate  
Kenya

Dr Chrispine Omondi  
Kenya Agricultural and Livestock Research Organization - KALRO  
Kenya

Mr Solomon O Odera  
Agriculture and Food Authority (AFA) - Fibre Crops Directorate  
Kenya

Mrs Ancha Ainadine  
Mozambique Institute for Cotton and Oilseeds  
Mozambique

Ms Marta Hrustel Majcen  
Republic of Slovenia, Ministry of Agriculture, Forestry and Food, EU

Ms Renee-Christine Claverie  
Représentation permanente de la France auprès de l’UE  
EU

Ms Agnès Capony  
European Commission, Delegation in Washington DC  
EU

Ms Zoe Druilhe  
EU Commission Directorate-General for International Partnerships (DG INTPA)  
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Kenya

Mrs Ancha Ainadine  
Mozambique Institute for Cotton and Oilseeds  
Mozambique

Mr Mohamed Ahmed Abdel-Gawad Nassar  
Egypt
<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Country</th>
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<td>Mr Edson Almeida</td>
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<td>Mr Armando Cardoso</td>
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<td>Mrs Victória Chaquisse</td>
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<td>Mr Francisco Santos</td>
<td>Mozambique Cotton Association</td>
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<td>Mr Navid Ahmad Dawoodi</td>
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<tr>
<th>Name</th>
<th>Institution</th>
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<tr>
<td>Mrs Sabahat Hussain</td>
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<td>Dr Manzoor Hussain</td>
<td>NIAB, Pakistan</td>
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<td>Dr Muhammad Shahid Iqbal</td>
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<td>Ayub Agriculture Research Institute, Faisalabad, Pakistan</td>
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<td>ICI Pakistan Limited</td>
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<td>Mr Hafiz Sabah-ud-din Mazhar</td>
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<td>Mrs Iqra Malik</td>
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<td>Dr Wajad Nazeer</td>
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<td>Raza Qaisar</td>
<td>Al haq ginning and oil industries pvt LTD</td>
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<td>Mr Hamza Ahmad Qureshi</td>
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<td>Mr Hamza Ramzan</td>
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<td>Ms Aqsa Saeed</td>
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<th><strong>United States</strong></th>
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<td>Dr Ibrokhim Abdurakhmonov</td>
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<tr>
<td>Fiber and Biopolymer Research Institute</td>
<td>Ministry of Innovative development of Uzbekistan</td>
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<tr>
<td>Mr Dhruv Agarwal</td>
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<td>Scientific Research Center of the Cotton Industry JSC “Paxtasanoat ilmiy markazi”</td>
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<td>Dr Akhtar Ali</td>
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<tr>
<td>Mr Ahmed Anter</td>
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<td>Egypt Embassy in Washington DC</td>
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<td>Mr Will Bettendorf</td>
<td>Mr Ibraim Khodjaev</td>
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<td>Dr Seshadri Ramkumar</td>
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<td>Dr Jesse Daystar</td>
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<td>Ms Gretchen Deatherage</td>
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<td>Tory Burch</td>
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<td>Mr Neal Gillen</td>
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<td>Mr Andrew P. Gutierrez</td>
<td>Dr Jodi Scheffler</td>
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