

PROCEEDINGS

80th



ICAC

PLENARY MEETING

Virtual



**Driving
Sustainability
Through Innovation
And Leadership**



PROCEEDINGS OF THE 80th PLENARY MEETING

**"Driving Sustainability Through
Innovation and Leadership"**



ICAC
Washington DC, USA

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FOREWORD

While vaccines have helped the world recover from the Covid-19 pandemic, the ICAC decided last year to hold its 80th Plenary Meeting virtually, from 29 November - 1 December 2022.

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
Chad
Côte d'Ivoire
Egypt
European Union

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

Taiwan
Tanzania
Togo
Turkiye
Uganda
United States of America
Uzbekistan
Zambia

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Statements of the Meeting, which are an integral part of the full record of the meeting, are published on the 80th Plenary Meeting webpage: <https://icac.org/Meetings/Details?eventId=1219>



Supply and Distribution of Cotton

1st December 2022

	2017/18	2018/19	2019/20	2020/21 est.	2021/22 proj.	2022/23 proj.
	million metric tonnes					
Beginning stocks						
World Total	18.88	19.43	19.34	22.12	20.54	19.79
China	10.35	9.03	8.88	9.02	9.37	8.61
USA	0.60	0.82	0.83	1.23	0.26	0.20
Production						
World Total	27.00	25.98	26.27	24.06	24.96	25.09
China	5.89	6.04	5.80	5.91	5.73	6.03
India	6.35	5.66	6.20	6.02	5.22	5.85
USA	4.56	4.00	4.34	3.18	3.81	3.05
Brazil	2.01	2.78	3.00	2.36	2.36	2.50
Pakistan	1.80	1.67	1.46	0.96	1.27	0.85
Uzbekistan	0.96	0.64	0.53	0.72	0.60	0.70
Others	5.44	5.20	4.94	4.92	5.97	6.11
Consumption						
World Total	26.35	26.01	23.05	25.57	25.70	23.84
China	8.50	8.25	7.23	8.40	8.31	7.28
India	5.42	5.40	4.45	5.70	5.30	5.34
Pakistan	2.35	2.36	2.34	2.15	2.45	1.90
Europe and Turkey	1.73	1.82	1.60	1.70	1.74	1.77
Bangladesh	1.66	1.58	1.50	1.64	1.73	1.60
Vietnam	1.51	1.51	1.45	1.52	1.68	1.60
Brazil	0.68	0.73	0.57	0.69	0.70	0.66
USA	0.70	0.63	0.47	0.52	0.56	0.50
Others	3.80	3.73	3.44	3.25	3.23	3.19
Exports						
World Total	9.14	9.28	9.21	10.73	9.79	9.38
USA	3.64	3.37	3.47	3.63	3.32	2.26
Brazil	0.91	1.31	1.95	2.42	1.75	1.96
Australia	0.85	0.79	0.30	0.35	0.79	1.53
CFA Zone	1.06	1.16	1.07	1.19	1.19	1.20
India	1.13	0.76	0.70	1.33	0.88	0.60
Uzbekistan	0.22	0.16	0.10	0.07	0.02	0.02
Imports						
World Total	9.04	9.22	8.77	10.66	9.78	9.38
China	1.32	2.10	1.60	2.84	1.85	1.80
Vietnam	1.52	1.51	1.41	1.56	1.70	1.66
Bangladesh	1.67	1.54	1.50	1.69	1.60	1.65
Turkey	0.96	0.79	1.02	1.37	1.44	1.20
Indonesia	0.77	0.66	0.55	0.50	0.54	0.54
Trade Imbalance †	-0.10	-0.06	-0.44	-0.07	-0.01	0.00
Stocks Adjustment ‡	0.00	0.00	-0.01	0.00	0.00	0.00
Ending Stocks						
World Total	19.43	19.34	22.12	20.54	19.79	21.04
China	9.03	8.88	9.02	9.37	8.61	9.13
USA	0.82	0.83	1.23	0.26	0.20	0.49
Ending Stocks/Mill Use (%)						
World less China *	58.29	58.86	82.72	65.04	64.31	71.89
China **	106.27	107.69	124.82	111.57	103.52	125.42
Cotlook A-Index***	87.98	84.35	71.33	84.96		

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.

‡ Difference 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.

STATEMENT OF THE 80th PLENARY MEETING

Driving Sustainability Through Innovation and Leadership

1. The International Cotton Advisory Committee met virtually between 29 November – 1 December 2022 for its 80th Plenary Meeting since the establishment of the Committee in 1939. The meeting was the second to be held virtually and 384 persons registered including representatives from 20 Member Governments, 6 international organisations and 14 non-member countries.

Reports from ICAC Secretariat with focus on sustainability

2. **Market Outlook:** For the 2022/23 cotton season, international cotton prices are expected to remain below those of the previous season. Due to the uncertainty surrounding global macroeconomic conditions, price volatility is expected to remain high for the remainder of the 22/23 season. Production for 22/23 is currently recorded at 25.03 million tonnes. This level of production is despite a catastrophic crop in Pakistan and the United States. Consumption is lower than the previous season and is currently projected at 24.91 million tonnes. Production is currently outpacing consumption and there appears to be sufficient supply for estimated demand.
3. **World Cotton Trade:** For 2022/23, while it is projected that USA will remain the leading exporter, its exports will drop by 32% to reach 2.2 million tonnes and it may lose up to 10% of its world market share. Some countries are registering a fall in exports because of an expected fall in production due to bad weather. World imports will be led by China; however, it is projected to experience a 2.59% fall this season, due to the economic environment and the US sanctions that came into effect in June 2022. Because the cotton crop was severely damaged by heavy rainfall, Pakistan may increase its imports this season. Other variables including the expectation of a production shortfall in the 2022/23 season, supply chain issues, the on-going pandemic, lower consumption levels, and major policy changes may also impact cotton trade.
4. **Textiles Strategy:** Textiles are now a major area of emphasis at the International Cotton Advisory Committee. To provide value to ICAC members, the organisation will aim to integrate various segments of the cotton supply chain by developing a textiles data portal. The portal will provide information regarding member countries' textile industries and a business-to-business portal to connect member countries' textile companies. This initiative includes information beyond the production and consumption of cotton lint. The strategy also aligns with participating industries including machinery, dyes and chemical manufacturing, and the services sector. A textiles research network for academia and the textiles sector including allied industries is also planned.
5. **Production and Trade Subsidies Affecting the Cotton Industry:** Assistance to the cotton sector in 2021/22 has been estimated at \$3.5 billion, a 57% decrease from the \$8.3 billion observed in 2020/21. In 2021/22, assistance averaged 9 cents per pound, down from 22.5 cents per pound in 2020/21. The government assistance report included information from nine countries.
6. **ICAC Researcher of the Year:** The 2022 ICAC Researcher of the Year was Dr Jodi Scheffler, a cotton genetics researcher at the USDA Crop Genetics Research Unit and Adjunct Professor at Mississippi State University, USA.

What Climate Smart, Sustainability Policies/Initiatives Have you Put in Place for Cotton and Textiles, for Example to Respond to COP26?

7. COP26 was a major event, held in Glasgow in November 2021, that brought together leaders from all countries in the world to discuss, review and agree on how to step up global action to solve the climate crisis. ICAC member governments are responding to its findings in different ways, including investing in projects that build farmer resilience; improving global market transparency for inputs; re-evaluating varieties and production practices; initiatives to tackle greenhouse gas emissions, soil and water loss and energy usage; investing in enhanced extension systems; and implementing a variety of emissions-reduction programmes.

How Can Regenerative Agriculture Contribute to a Sustainable Cotton Industry?

8. Experts stated that policy measures need to upscale improved technologies for cotton production and must be pro-nature and pro-farmers. Restoration of soil health by restoring soil organic carbon content can improve soil structure and reduce the risks anaerobiosis at critical stages of cotton growth. In the context of climate change, the strategy should be to reconcile the need to produce more cotton with the necessity for improving the environment and restoring the health of degraded soils by re-carbonisation of the terrestrial biosphere via increasing stock of soil carbon in the root zone. However, farmers and land managers must be motivated to adopt conservation-effective cotton production systems through payments for ecosystem services.
9. In the tropics, crop rotation is important because it increases the carbon stock in the soils. Cycling and nutrient use efficiency can improve crop productivity, especially in sandy soils. Increasing yields could be the best approach to increasing the sustainability of cotton over time because it requires improvement in soil quality, which is only possible with the adoption of conservation practices such as crop rotation. Identifying the most appropriate cover cropping systems is the main challenge for regenerative agriculture.
10. Regenerative agriculture has recently been identified by textile companies as an important consumer concern. When comparing a set of 13 statements about regenerative agriculture from textile companies, two common concerns emerge: climate and soil health. These are linked because soil health can sequester carbon and expand resiliency. Although there is no consensus on the principles, definitions or certifications of regenerative agriculture, its practice can be encouraged through support of cotton production protocols that include soil

health. Textile consumer concerns about regenerative agriculture, climate change and microplastics offers an unprecedented opportunity for cotton to emphasise its role (both during the production and the processing phases) in protecting the environment. 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. The 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.

Regulatory Policies by Governments that Could Negatively Affect the Consumption of Natural Fibres

11. All four Permanent Committees of the Private Sector Advisory Council (PSAC) urged the EU to revisit the process adopted by the EU commission and German government for policy making. In addition to their direct impact, once the EU has its policies in place, other countries are likely to follow and many of the PSAC members were not even aware of this legislation and its potential negative impacts. It was noted that the Product Environmental Footprint (PEF) system does not include a fair evaluation of the impact of microplastic pollution on the environment and relevant impact categories, such as use and end of life, were not accounted for in the presentation of the Higg MSI data. It was recommended that the complete life cycle of a product should be considered for asserting the environmental performance of a fibre. Products with renewable and biodegradable raw materials such as natural fibres are more circular than products made from fossil fuel sources because they can naturally decompose over time, and that needs to be included in all evaluations. Additionally, in a true cradle-to-gate analysis, the biogenic carbon captured in the fibre would be shown as negative emissions only, thus making cotton carbon negative.
12. Regarding traceability, it was recommended that any rules concerning cotton must also be applied to other fibres, including manmade fibres. Moreover, when considering cotton in particular, it is important to consider the social and economic impact of a sector that supports the livelihood of millions of farmers and textile workers across the globe. It is the only source of income for many households, making it a vital crop in raising the income of small-scale farmers and downstream stakeholders. Governments were urged to support the economies of less-developed nations which rely on cotton as one of their most-traded commodities.

Rethinking Fashion and Textiles for 2030

13. The textiles value chain spurs industrialisation and can also contribute to the achievement of the UN Sustainable Development Goals (SDGs). The first dedicated textiles session received an overwhelming response with seven speakers from different countries covering various topics. Next year, there will be more textiles sessions covering topics on textiles technology, dyes and chemicals, economics, sustainability, circularity, traceability, compliance and fashion.

World Café: The Evolving Global Textile Supply Chain

14. Cotton is the most complex agricultural commodity in terms of its supply chain. New technologies and processes that further contribute to this complexity, especially with regard to sustainability initiatives, will negatively impact Small and Medium Enterprises (SMEs) given their lack of extensive resources. If a technology such as traceability becomes too expensive or difficult to implement, SMEs will be the first to abandon them. Greenwashing is becoming an even bigger problem as companies try to portray their operations as being better and more environmentally friendly than they are. Another major issue is audit fatigue, which not only slows the supply chain down with additional requirements but will also affect SMEs more than their larger, better-funded competitors. One way to overcome this is to align and streamline the requirements from different organisations so stakeholders only need to go through one audit, as demonstrated by ABRAPA with Better Cotton.

Steering Committee

15. The Committee noted the proposal to form an International Textiles Research Council and suggested that the Secretariat revisit the proposal and utilise ICAC's strength as an intergovernmental body to connect with existing textile networks and activities and to take advantage of ICAC's infrastructure and activities in lieu of establishing a brand new, complex organisation.

The Topic of the 2023 Technical Seminar

16. The Committee decided to hold the 2023 Technical Seminar on a topic that was a combination of two proposed titles: 'Recent Technological Innovations as Gamechangers on Cotton Farms' and 'Climate Smart Technologies for Cotton Production'. The exact wording would be approved at a later date.

Future Plenary Meeting:

17. The Plenary Meeting for 2023 will be a face-to-face meeting.

بيان الاجتماع العام الثماني للجنة الاستشارية الدولية للقطن (إيكاك/ICAC) "دفع عجلة الاستدامة من خلال الابتكارات والعمل القيادي"

١- عقدت اللجنة الاستشارية الدولية للقطن (إيكاك) في الفترة الواقعة ما بين ٢٩ نوفمبر/تشرين الثاني و ١ نوفمبر/كانون الأول اجتماعها العام الثماني منذ إنشاء اللجنة في عام ١٩٣٩. وكان هذا الاجتماع هو الاجتماع الثاني الذي يُعقد افتراضياً، وقد شارك فيه ٣٨٤ شخصاً مسجلين بمن فيهم ممثلين عن ٢٠ حكومة من الأعضاء و ٦ منظمات دولية و ١٤ بلدًا من البلدان غير الأعضاء.

تقارير الأمانة العامة للجنة الاستشارية الدولي للقطن (إيكاك) مع تركيز على الاستدامة

٢- **آفاق السوق:** بالنسبة لموسم القطن ٢٠٢٢/٢٠٢٣ يُتَوَقَّع أن تبنى أسعار القطن العالمية دون أسعار الموسم السابق. ونظراً لحالة عدم اليقين المحيطة بظروف الاقتصاد الكلي العالمية من المحتمل أن يستمر الارتفاع في تذبذب الأسعار طيلة الفترة المتبقية من موسم ٢٠٢٢/٢٠٢٣. وقد بلغ الإنتاج في موسم ٢٠٢٢/٢٠٢٣ في الوقت الحالي ٢٥,٠٣ مليون طن وتحقق ذلك على الرغم من المحصول الكارثي في كل من باكستان والولايات المتحدة الأمريكية. وكان الاستهلاك أدنى من الموسم السابق، ويتوقع أن يبلغ ٢٤,٩١ مليون طن. ويتجاوز الإنتاج حالياً الاستهلاك، ويبدو أن هناك عرض كافٍ يفي بالطلب المقدر.

٣- **تجارة القطن العالمية:** بالنسبة لـ ٢٠٢٢/٢٠٢٣ بينما يتوقع أن تبقى الولايات المتحدة الأمريكية المصدر الرئيسي، إلا أن صادراتها ستخضع بنسبة ٣٢٪ لتصل إلى ٢,٢ مليون طن، وقد تنفذ ما يصل إلى ١٠٪ من حصتها في السوق العالمية. وتسجل بعض البلدان انخفاضاً في الصادرات بسبب الانخفاض المتوقع في الإنتاج الناجم عن سوء الأحوال الجوية. وستكون الصين في طليعة البلدان المستوردة للقطن، ومع ذلك يتوقع أن تشهد الصين في هذا الموسم انخفاضاً بنسبة ٥,٩٩٪، وذلك بسبب المناخ الاقتصادي والجزءات التي ترفضها الولايات المتحدة على الصين والتي دخلت حيز التنفيذ في شهر يونيو/حزيران ٢٠٢٢. وقد تقوم باكستان بزيادة وارداتها هذا الموسم نتيجة لتضرر موسم القطن فيها بشدة بسبب سقوط كميات هائلة من الأمطار. وهناك متغيرات أخرى قد تؤثر على تجارة القطن، من ضمنها حدوث نقص في الإنتاج في موسم

٢٠٢٢/٢٠٢٣، ومسائل متعلقة بسلسلة توريد القطن والجائحة المستمرة، وانخفاض مستويات الاستهلاك، وحدث تغييرات كبيرة في السياسات.

٤- **استراتيجية المنسوجات:** غدت المنسوجات الآن مجال تركيز رئيسي داخل اللجنة الاستشارية الدولية للقطن. ولكي توفر اللجنة قيمة ومفيدة لأعضائها سوف تسعى إلى إدماج مختلف قطاعات توريد القطن وذلك عن طريق وضع بوابة لبيانات المنسوجات. وسوف تقوم هذه البوابة بتوفير المعلومات عن صناعات البلدان من المنسوجات وعن شركات المنسوجات في البلدان الأعضاء. وتتضمن هذه المبادرة معلومات تتعلق بإنتاج واستهلاك وبرة القطن. وتتوافق الاستراتيجية أيضاً مع الصناعات المشاركة بما فيها الآليات والأصباغ والتصنيع الكيميائي وقطاع الخدمات. ويجري التخطيط لإحداث شبكة أبحاث للمنسوجات للأوساط الأكاديمية وقطاع المنسوجات بما في ذلك الصناعات المتحالفة.

٥- **الإعانات المالية في الإنتاج والتجارة التي تؤثر على صناعة القطن:** قدرت المساعدة لقطاع القطن في موسم ٢٠٢١/٢٠٢٢ بـ ٥,٣ مليون دولار، أي أنها انخفضت بنسبة ٥٧٪ عما كانت عليه في موسم ٢٠٢٠/٢٠٢١ عندما كانت المساعدة ٨,٣ بلون دولار. وفي موسم ٢٠٢٢/٢٠٢١ وصل متوسط المساعدة ٩ سنوات للرطل الواحد، وبهذا سجلت انخفاضاً عما كان عليه في موسم ٢٠٢٠/٢٠٢١ إذ بلغت المساعدة ٢٢,٥ سنتاً للرطل. وتتضمن تقرير المساعدة الحكومية معلومات من تسعة بلدان.

٦- **باحث اللجنة الاستشارية الدولية للقطن للعام:** كانت الدكتور جودي شيفر باحثة العام لعام ٢٠٢٢، وهي باحثة متخصصة في علم الوراثة في وحدة أبحاث علم وراثة المحاصيل في وزارة الزراعة الأمريكية، وهي أيضاً مدرسة مساعدة في جامعة ولاية ميسيسيبي في الولايات المتحدة الأمريكية.

ما هي سياسات/مبادرات الاستدامة الذكية مناخياً التي وضعتموها للقطن والمنسوجات، على سبيل المثال، كرد على مؤتمر الأطراف السادس والعشرين؟

٧- شكل مؤتمر الأطراف السادس والعشرين الذي عقد في غلاسكو في شهر نوفمبر/تشرين الثاني ٢٠٢١، حدثاً هاماً، إذ جمع معاً قادة من جميع البلدان لمناقشة إجراءات عالمية واستعراضها والاتفاق عليها بغية حل أزمة المناخ. وتقوم الحكومات الأعضاء في اللجنة الاستشارية الدولية للقطن بالاستجابة لهذه النتائج بمختلف الطرق، بما في ذلك الاستثمار في مشروعات تؤدي إلى بناء قدرة المزارع على الصمود، وتحسين شفافية السوق العالمية لمستلزمات الإنتاج الزراعي، وإعادة تقييم الأصناف،

وممارسات الإنتاج، ومبادرات لمعالجة انبعاثات غازات الاحتباس الحراري وخسارة التربة والمياه واستخدام الطاقة، والاستثمار في أنظمة وسائل الإنتاج المحسنة، وتنفيذ مجموعة متنوعة من برامج خفض الانبعاثات.

كيف يمكن للزراعة المتجددة الإسهام في صناعة قطن مستدامة؟

٨- أوضح الخبراء أن تدابير السياسة اللازمة يجب أن ترفع مستوى التقنيات المحسنة لإنتاج القطن وأن تكون مهيئة للطبيعة ومناصرة للمزارعين. إن استعادة صحة التربة من خلال استعادة محتوى التربة من الكربون العضوي يمكنه أن يؤدي إلى تحسين بنية التربة والإقلال من مخاطر انعدام الهواء أو الأكسجين (anaerobiosis) في المراحل الحرجة من نمو القطن. وفي سياق تغير المناخ ينبغي أن تقوم الاستراتيجية على التوفيق بين الحاجة إلى إنتاج مزيد من القطن وضرورة تحسين النبتة واستعادة صحة التربة المتدهورة عن طريق إعادة كربنة المحيط الحيوي الأرضي من خلال زيادة مخزون التربة من الكربون في منطقة الجذر. ومع ذلك يجب تحفيز المزارعين ومديري الأراضي على اعتماد أنظمة قطن فعالة فيها وحافظه عن طريق القيام بمدفوعات لصالح خدمات النظام الإيكولوجي.

٩- في المناطق الاستوائية من المهم تناوب المحاصيل لزيادة مخزون الكربون في التربة والتدوير وكفاءة استخدام المغذيات التي يمكن أن تحسن إنتاج المحاصيل وخاصة في الترب الرملية. وزيادة الغلال يمكن أن تكون أفضل طريقة لزيادة استدامة القطن مع مرور الوقت، لأن هذا يتطلب تحسين جودة التربة الذي يعتبر السبيل الوحيد لاعتماد ممارسات الحفظ مثل تناوب المحاصيل. والتحديات الرئيسية أمام الزراعة المتجددة هو تجديد أنسب أنظمة للغطاء الزراعي.

١٠- جرى تحديد الزراعة المتجددة (RA) مؤخراً من قبل شركات النسيج باعتبارها المشغل المهم للمستهلكين. وبمقارنة مجموعة من ١٣ بيان حول الزراعة المتجددة من شركات النسيج، نجد شاغلين مشتركين: المناخ وصحة التربة. وهذان العاملان مترابطان فيما بينهما لأن صحة التربة يمكنها أن تحبس الكربون وتزيد من المرونة والمنعة. وعلى الرغم من عدم وجود توافق على مبادئ الزراعة المتجددة أو تعاريفها أو الاعتراف بقيمتها يمكن مع ذلك تشجيعها من خلال دعم بروتوكولات إنتاج القطن التي تشمل صحة التربة. ومن شأن المخاوف لدى مستهلكي المنسوجات بشأن الزراعة المتجددة وتغير المناخ والمواد البلاستيكية الدقيقة أن توفر فرصة غير مسبوقة للقطن لتأكيد دوره (سواء خلال مراحل الإنتاج أو المعالجة) في حماية البيئة.

السياسات التنظيمية للحكومات التي يمكن أن تؤثر سلباً على استهلاك الألياف الطبيعية

١١- حثت جميع اللجان الأربع الدائمة للمجلس الاستشاري لقطاع الخاص (PSAC) الاتحاد الأوروبي على إعادة النظر في العملية التي اعتمدها مفوضية الاتحاد الأوروبي والحكومة الألمانية في وضع السياسات. وأحاط الاتحاد الأوروبي علماً بالتعليقات وبين أن البيان الختامي للمجلس الذي لم تتم مناقشته مع الاتحاد الأوروبي حتى الآن سيحال إلى الجهات المختصة في مفوضية الاتحاد الأوروبي. وفضلاً عن تأثير العملية المباشر، فبمجرد أن يضع الاتحاد الأوروبي سياساته موضع التنفيذ فمن المرجح أن تتبعه في ذلك دول أخرى. والعديد من أعضاء المجلس الاستشاري (PSAC) لم يكونوا على دراية بهذا التشريع وتأثيراته السلبية المحتملة. وقد لوحظ أن نظام البصمة البيئية للمنتج (PEF) لا يتضمن تقييماً عادلاً لتأثير التلوث باللدائن الدقيقة على البيئة، وأن فئات التأثير ذات الصلة، مثل الاستخدام ونهاية صلاحية الاستخدام، لم يتم أخذها بعين الاعتبار في عرض بيانات مؤشر هينغ لاستدامة البيانات (HIGE MSI). وأوصى المجلس بأن يتم النظر في دورة الحياة الكاملة للمنتج لتأكيد الأداء البيئي للألياف. والمواد الخام المتجددة والقليلة للتدخل الحيوي مثل الألياف الطبيعية تكون أكثر دائرية من المنتجات المصنوعة من مصادر الوقود الأحفوري لأنها يمكن أن تتحلل بمرور الوقت بشكل طبيعي ويجب تضمينها في جميع التقييمات. وبالإضافة إلى ذلك، سيظهر في تحليل حقيقي من المهد إلى البوابة أن الكربون الحيوي الذي يتم التقاطه في الألياف على أنه انبعاث سلبي، مما يجعل الكربون سالباً. وأوصى أيضاً فيما يتعلق بإمكانية التتبع بأن أي قواعد تتعلق بالقطن يجب أن تُطَبَّق أيضاً على الألياف الاصطناعية. وعلاوة على ذلك، من المهم عند التفكير بالقطن على وجه الخصوص النظر في التأثير الاجتماعي والاقتصادي للقطاع الذي يدعم سبل العيش لملايين المزارعين وعمال النسيج في جميع أنحاء العالم. ولكونه مصدر الدخل الوحيد للعديد من الأسر لذا فهو يشكل مصدراً حيوياً في زيادة دخل صغار المزارعين وأصحاب المصلحة المتطوون تحتته. وقد تم حث الحكومات على دعم اقتصادات الدول الأقل نمواً التي تعتمد على القطن كأحد السلع الأكثر تداولاً.

إعادة التفكير في الأزياء والمنسوجات

١٢- تحفز سلسلة قيمة أعمال المنسوجات عملية التصنيع، ويمكن أن تساهم أيضاً في تحقيق أهداف التنمية المستدامة للأمم المتحدة. ولقيت الجلسة الأولى المخصصة للمنسوجات استجابة ساحقة من سبعة متحدثين من بلدان مختلفة غطوا مواضيع مختلفة. وفي العام المقبل سيكون هناك

اللجنة التوجيهية

١٤- أحاطت اللجنة علماً بالاقترح الداعي إلى تشكيل مجلس دولي لبحوث المنسوجات، واقترحت أن تقوم الأمانة بإعادة النظر في الاقتراح، وأن تستخدم قوة اللجنة الاستشارية باعتبارها هيئة حكومية دولية لربط شبكات المنسوجات الموجودة وأنشطتها وأن تستفيد من الهياكل الأساسية للجنة الاستشارية وأنشطتها بدلاً من إنشاء منظمة جديدة ومعقدة.

موضوع الندوة التقنية لعام ٢٠٢٤

١٥- قررت اللجنة عقد ندوة تقنية لعام ٢٠٢٣ حول موضوع هو مزيج من عنوانين مقترحين "الابتكارات التكنولوجية الحديثة باعتبارها مغيرة للقواعد في مزارع القطن" و "التكنولوجيا الذكية مناخياً لإنتاج القطن". وستتم الموافقة على التسمية النهائية في موعد لاحق.

الاجتماع العام القادم

١٦- سيعقد الاجتماع القادم في عام ٢٠٢٣. وسيكون الاجتماع حضورياً.

العديد من جلسات المنسوجات تشمل موضوعات حول تكنولوجيا المنسوجات، والأصباغ، والكيمائيات، وعلم الاقتصاد، والاستدامة، والعملية الدائرية، والتتبع، والامتثال، والأزياء.

المقهى العالمي: سلسلة توريد المنسوجات العالمية المتطورة

١٣- يعتبر القطن أكثر سلعة زراعية معقدة من حيث سلسلة مراحل عملها. والحاجة إلى إضافة التعقيد إليها - في شكل تكنولوجيات وعمليات جديدة مطلوبة تزيد من تعقيدها وخاصة فيما يتعلق بمبادرات الاستدامة ستؤثر سلباً على المؤسسات الصغيرة والمتوسطة والشركات الصغيرة والمتوسطة، نظراً لافتقارها إلى الموارد الواسعة. وإذا كانت تقنيات مثل تقنية إمكانية التتبع باهظة الثمن أو من الصعب تنفيذها، لذا ستكون الشركات الصغيرة والمتوسطة أول من سيتخلى عنها. وغدت عملية (Greenwashing) التمويه الأخضر تشكل مشكلة أكبر لأن بعض الشركات تحاول تصوير عملياتها على أنها أفضل وأكثر صداقة للبيئة مما هي عليه. وهناك مشكلة أخرى تتمثل في الإجهاد في التدقيق الذي لا يؤدي فقط عن طريق المتطلبات الإضافية إلى إبطاء سلسلة التوريد، ولكنه سيؤثر كذلك على الشركات المتوسطة والصغيرة على نحو أكبر مما سيؤثر على منافسيها الأكبر والأكثر تمويلاً. وتتمثل إحدى طرق التغلب على ذلك في مواءمة وتبسيط المتطلبات من المؤسسات المختلفة بحيث يتعين على أصحاب المصلحة فقط إجراء عملية تدقيق واحدة، كما هو موضح من خلال الرابطة البرازيلية للمنتجات المزراعية (ABRAPA) مع مبادرة أفضل للقطن (BCI).

ЗАЯВЛЕНИЕ 80-ГО ПЛЕНАРНОГО ЗАСЕДАНИЯ

«Обеспечение устойчивого развития за счет инноваций и лидерства»

1. Международный Консультативный Комитет по Хлопку собрался виртуально в период с 29 ноября по 1 декабря 2022 г. на свое 80-е пленарное заседание с момента создания Комитета в 1939 г. Это второе заседание, которое проводилось виртуально, и на нем было зарегистрировано 384 человека, включая представителей 20 правительств-членов, 6 международных организаций и 14 стран, не являющихся членами комитета.

Отчеты Секретариата МККХ с акцентом на устойчивость

2. **Перспективы рынка.** Ожидается, что в хлопковом сезоне 2022/23 гг. мировые цены на хлопок останутся ниже цен предыдущего сезона. Ожидается, что из-за неопределенности, связанной с глобальными макроэкономическими условиями, волатильность цен останется высокой до конца сезона 22/23. Производство за 22/23 в настоящее время составляет 25,03 млн тонн. Такой уровень производства сохранился, несмотря на катастрофический неурожай в Пакистане и США. Потребление оказалось ниже, чем в предыдущем сезоне, и в настоящее время прогнозируется на уровне 24,91 млн тонн. Производство в настоящее время опережает потребление, и, как представляется, предложение достаточно для предполагаемого спроса.
3. **Мировая торговля хлопком:** в сезоне 2022/23 гг., хотя прогнозируется, что США останутся ведущим экспортером, их экспорт упадет на 32% до 2,2 млн тонн и они могут потерять до 10% своей доли на мировом рынке. В некоторых странах отмечается снижение экспорта из-за ожидаемого падения производства из-за плохой погоды. В этом сезоне мировой импорт будет возглавлять Китай, однако прогнозируется, что в этом сезоне импорт Китая снизится на 2,59% из-за экономической ситуации и санкций США, вступивших в силу в июне 2022 года. По причине того, что урожай хлопка серьезно пострадал из-за проливных дождей, Пакистан может значительно увеличить свой импорт в этом сезоне. Другие переменные, в том числе ожидание дефицита производства в сезоне 2022/23, проблемы с цепочками поставок и продолжающаяся пандемия, более низкое потребление и серьезные изменения государственной политики также могут повлиять на торговлю хлопком.
4. **Стратегия в отношении текстиля.** Текстиль в настоящее время находится в центре внимания Международного Консультативного Комитета по Хлопку. Чтобы обеспечить ценность для членов МККХ, комитет будет стремиться интегрировать различные сегменты цепочки поставок хлопка путем разработки портала данных по текстилю. На портале будет представлена информация о текстильной промышленности стран-членов, а также межкорпоративный портал для связи текстильных компаний стран-членов. Эта инициатива включает информацию не только о производстве и потреблении хлопкового пуха. Стратегия также согласуется с участвующими отраслями, включая машиностроение, производство красителей и химическое производство, а также сектор услуг. Также планируется создать исследовательскую сеть по текстилю для академических кругов и текстильного сектора, включая смежные отрасли.
5. **Производственные и торговые субсидии, влияющие на хлопковую промышленность.** Субсидии хлопковому сектору в 2021/22 году оцениваются в 3,5 миллиарда долларов, что

на 57% меньше по сравнению с 8,3 миллиардов долларов в 2020/21 году. В 2021/22 году помощь составляла в среднем 9 центов за фунт по сравнению с 22,5 цента за фунт в 2020/21 году. Отчет о государственной помощи включал информацию из девяти стран.

6. **Исследователь года по версии МККХ.** Исследователем года по версии ICAC в 2022 году стала доктор Джоди Шеффлер, исследователь генетики хлопка в Исследовательском отделе генетики сельскохозяйственных культур Министерства сельского хозяйства США и адъюнкт-профессор Университета штата Миссисипи, США.

Какие политики/инициативы в области устойчивого развития с учетом климата вы внедрили в отношении хлопка и текстиля в ответ на COP26?

7. COP26 — это крупное мероприятие, состоявшееся в Глазго в ноябре 2021 года, на котором собрались лидеры всех стран мира, чтобы обсудить, рассмотреть и согласовать пути активизации глобальных действий по разрешению климатического кризиса. Правительства стран-членов МККХ по-разному реагируют на его выводы, в том числе: инвестируют в проекты, повышающие устойчивость фермерских хозяйств; повышают прозрачность глобального рынка ресурсов; переоценивают сорта и методы производства; инициируют борьбу с выбросами парниковых газов, потерей почвы и воды и повышенным потреблением энергии; инвестируют в усовершенствованные системы распространения знаний; осуществляют различные программы по сокращению выбросов.

Как регенеративное сельское хозяйство может способствовать устойчивой хлопковой промышленности?

8. Эксперты отметили, что политические меры необходимы для расширения масштабов усовершенствованных технологий производства хлопка и должны быть ориентированы на природу и фермеров. Восстановление здоровья почвы путем восстановления содержания органического углерода в почве может улучшить структуру почвы и снизить риски анаэробии на критических стадиях роста хлопка. В контексте изменения климата стратегия должна заключаться в том, чтобы примирить необходимость производить больше хлопка с необходимостью улучшения состояния окружающей среды и восстановления здоровья деградированных почв путем повторной карбонизации наземной биосферы за счет увеличения запасов почвенного углерода в корневых зонах. Тем не менее, фермеры и землевладельцы должны быть заинтересованы в принятии экологически эффективных систем производства хлопка посредством платежей за экосистемные услуги.
9. В тропических регионах очень важен севооборот, потому что он повышает запас углерода в почвах. Цикличность и эффективное использование питательных веществ может повысить урожайность сельскохозяйственных культур, в особенности в песчаных почвах. Повышение урожайности может быть наилучшим подходом к повышению устойчивости выращивания хлопка с течением времени, поскольку для этого требуется улучшение качества почвы, что возможно только при применении природоохранных методов, таких как севооборот. Определение наиболее подходящих

систем покровных культур является главной задачей для регенеративного сельского хозяйства.

10. Регенеративное сельское хозяйство недавно было определено текстильными компаниями как серьезная проблема для потребителей. Сравнивая набор из 13 утверждений текстильных компаний о регенеративном сельском хозяйстве, можно выделить две общие проблемы — климат и здоровье почвы. Они связаны между собой, потому что здоровье почвы может подразумевать поглощение углерода и повышение устойчивости. Хотя нет единого мнения о принципах, определениях или сертификации в регенеративном сельском хозяйстве, его внедрение можно поощрять путем поддержки протоколов производства хлопка, которые включают здоровье почвы. Обеспокоенность потребителей текстиля по поводу регенеративного сельского хозяйства, изменения климата и микропластика дает хлопку беспрецедентную возможность подчеркнуть свою роль (как на этапах производства, так и на этапах обработки) в защите окружающей среды.

Регулирующие политики правительств, которые могут негативно повлиять на потребление натуральных волокон

11. Все четыре постоянных комитета Консультативного Совета по Частному Сектору призвали ЕСПересмотреть процесс, принятый комиссией ЕС и правительством Германии для разработки регулирующих политик. ЕС принял к сведению комментарии и сообщил, что итоговое заявление КСЧС, которое до сих пор не обсуждалось с ЕС, будет передано в соответствующие службам комиссии ЕС. согласно КСЧС, в дополнение к прямому воздействию этих политик, как только ЕС примет их, другие страны, вероятно, последуют этому примеру, и многие члены КСЧС даже не имели информации об этих законодательных инициативах и их потенциальных негативных последствиях. Было отмечено, что система «Экологический след продукта» (PEF), согласно анализу КСЧС, не включает справедливую оценку воздействия загрязнения микропластиком окружающей среды, а соответствующие категории воздействия, такие как использование и окончание срока службы, не учитывались при представлении данных Higg MSI. КСЧС рекомендовал учитывать полный жизненный цикл продукта для утверждения экологических характеристик волокна. Продукты из Возобновляемых и биоразлагаемых сырьевых материалов, такие как натуральные волокна, более универсальны, чем продукты, изготовленные из ископаемого топлива, поскольку они могут естественным образом разлагаться с течением времени, и это должно учитываться во всех оценках. Кроме того, в истинном анализе жизненного цикла биогенный углерод в волокне будет показан только как отрицательная эмиссия, что делает показатели хлопкового углерода отрицательными.
12. Что касается отслеживаемости, было рекомендовано, чтобы любые правила, касающиеся хлопка, также применялись к другим волокнам, включая искусственные волокна. Более того, при рассмотрении хлопка, в частности, важно учитывать социальное и экономическое влияние отрасли, которая дает средства к существованию миллионам фермеров и работников текстильного сектора по всему миру. Это единственный источник дохода для многих домохозяйств, что делает хлопок жизненно важной культурой для повышения доходов мелких фермеров и других заинтересованных сторон. Правительствам было настоятельно рекомендовано поддерживать экономику менее развитых стран, которые полагаются на хлопок как на один из самых продаваемых товаров.

Переосмысление моды и текстиля на 2030 год

13. Цепочка добавленной стоимости текстиля стимулирует индустриализацию, а также может способствовать достижению Целей ООН в области устойчивого развития (ЦУР). Первая специализированная сессия, посвященная текстилю, получила огромный отклик: семь спикеров из разных стран освещали различные темы. В следующем году будет больше сессий по текстилю, посвященных текстильным технологиям, красителям и химикатам, экономике, устойчивому развитию, циркулярности, отслеживаемости, соответствию требованиям, моде и т. д.

World Café: развивающаяся глобальная цепочка поставок текстиля

14. Хлопок является наиболее сложным сельскохозяйственным товаром с точки зрения цепочки поставок. Новые технологии и процессы, которые еще больше усугубляют эту сложность, особенно в отношении инициатив в области устойчивого развития, окажут негативное влияние на малые и средние предприятия (МСП), учитывая отсутствие у них обширных ресурсов. Если такая технология, как отслеживаемость, станет слишком дорогой или сложной для внедрения, МСП откажутся от нее первыми. «Зеленый камуфляж» (Greenwashing) становится еще более серьезной проблемой, поскольку компании пытаются представить свою деятельность как более качественную и экологически чистой, чем она есть на самом деле. Другой серьезной проблемой является усталость от аудита, которая не только замедляет цепочку поставок из-за дополнительных требований, но и сильнее влияет на МСП, чем на их более крупных и лучше финансируемых конкурентов. Один из способов преодолеть это — согласовать и оптимизировать требования разных организаций, чтобы заинтересованным сторонам нужно было пройти только один аудит, например, как продемонстрировала ABRAPA и Better Cotton.

Руководящий комитет

15. Комитет принял к сведению предложение о создании Международного исследовательского совета по текстилю и предложил, чтобы Секретариат пересмотрел это предложение и использовал возможности МККХ как межправительственного органа для связи с существующими текстильными сетями и инициативами, а также для использовать преимущества инфраструктуры и деятельности МККХ вместо создания совершенно новой, сложной организации.

Тема технического семинара 2023 г.

16. Комитет решил провести Технический семинар в 2023 году по теме, представляющей собой сочетание двух предложенных названий: «Недавние технологические инновации, меняющие правила игры на хлопковых фермах» и «Климатически безопасные технологии для производства хлопка». Точная формулировка будет утверждена позднее.

Будущее пленарное заседание:

17. Пленарное заседание 2023 года будет очным.

Inaugural Plenary Session

08:00 am – 09:15 (GMT-5); Australia (Perth, AW): 09:00 pm – 10:15 pm; Europe: 13:00 – 14:15 (GMT),

Tuesday 29 November 2022

Chairman: Mr Patrick Packnett, USA, ICAC Chairman of the Standing Committee

Mr Kai Hughes, ICAC Executive Director, welcomed all the delegates and the participants to the 80th Plenary Meeting. He shared some housekeeping guidelines and welcomed Mr Patrick Packnett, the Chair of the Standing Committee, to lead the session.

Mr Patrick Packnett, Chair of the ICAC Standing Committee, opened the proceedings of the 80th virtual Plenary Meeting of the International Cotton Advisory Committee by welcoming the delegates, participants and guests and put the agenda forward for formal approval.

The delegate from EU had a concern on an issue concerning the Steering Committee agenda and inquired if she should bring it up at this point or at the date of the Steering Committee Session. The chairman said that the matter to be brought up at the Steering Committee session scheduled for Thursday 1 December 2022. With being no other issue raised, the agenda was approved.

Mr Packnett delivered his inaugural speech by sharing an history on how the ICAC had come into being 83 years ago. He appreciated the fact that ICAC operations have gone back to normal and that ICAC Secretariat has been on the ground in many countries executing the ICAC mandate. He noted that the challenges facing the cotton economy have evolved since the creation of the ICAC many years ago and that the organisation is evolving to address these challenges. He identified climate change as the number one challenge the globe is facing currently and highlighted the innovations and technology that the ICAC had adopted to address some of these challenges and help spread best practices. He reiterated importance of World Cotton Day and the role it has played in highlighting the virtues and importance of cotton to the livelihoods of millions of people in the world. The Chair praised the new dynamic Data Dashboard developed by the ICAC Secretariat that offers powerful

tools to clearly visualise and analyse data thus providing better insights into global cotton situations for Member governments and other stakeholders. Of particular importance was the creation of the Private Sector Advisory Council which has representation from all the sectors in the value chain making it easy to address the challenges each is facing. He thanked the Standing Committee members and the ICAC Secretariat for their dedicated service to the organisation.

Report of the Executive Director by Mr Kai Hughes

Mr Hughes highlighted the need to evaluate and take stock of events at the end of every year, determining performance and identifying areas of improvement going forward according to the Strategic Plan. After taking the leadership of ICAC five years ago, Mr Hughes has put measures in place to change the organisation's culture to reflect one of dynamism and innovation as one of the key points of his tenure. He observed that the mission of the ICAC is to serve the cotton and textile communities and that for the last three years the focus has been on the promotion of knowledge sharing, innovation, partnerships and providing a forum for discussions of sector matters. Mr Hughes recognised the fact that the textile sectors are where more jobs and wealth are created hence the decision to recruit its first ever ICAC's Head of Textile last year.

Mr Hughes reported that in order to increase demand for cotton, counter the myths and negativity surrounding cotton and fight for market share with synthetic fibres, the ICAC has created a series of videos called 'Truth About Cotton' and developed the idea of World Cotton Day. He reported that World Cotton Day was launched in 2019 with ICAC's partners — WTO, ITC, UNCTAD and FAO — and that in 2021, World Cotton Day was added to the United Nations permanent calendar. He further highlighted the initiatives the Secretariat has undertaken to help member countries address their production challenges such as the Four Simple Steps to Sustainable Cotton programme, which was designed to help small scale farmers double their yields within 3-5 years, and a farmer training pro-

gramme supported by GIZ, ITC and EU. He further reported that ICAC's Data Scientist, Mr Mathew Looney, had created a platform that allows users to interact with data to get insights and intelligence and that the platform will be available to the general public, but more powerful applications will be limited to ICAC Member governments. He also reported that to back up its training programme, the ICAC launched two innovations: virtual reality training and an interactive soil & plant health app (the ICAC Cotton Expert).

Mr Hughes recognised Cotton Incorporated as a funding partner for the Soil and Plant Health App and also CIRAD and Cotton Connect as key partners in some of the projects the ICAC is developing. He also recognised implementing partners like African Cotton Foundation (ACF), Cotton Development Trust – Zambia (CDT) and the Cotton Board of Zambia (ZCGA). He informed the Plenary Meeting that the PSAC was as an evolution of the former Private Sector Advisory Panel to the PSAC, which brings experts from all sectors of the supply chain together to discuss challenges facing the sector and find common solutions. Mr Hughes reiterated the potential of the PSAC and that with more than 60 organisations coming together to address the challenges of the cotton Sector there is a need for PSAC to be part of ICAC's Plenary Meetings. He acknowledged the role Mr Peter Wakefield, PSAC Chair, and Ms Parkhi Vats, ICAC Commodity Trade Analyst, played in the establishment of PSAC and its various committees.

Mr Hughes announced that next year's plenary meeting will revert to being a face-to-face meeting.

Recognition of the ICAC Researchers of the Year, 2022

Each year, the International Cotton Advisory Committee recognises cotton researchers from across the globe for their significant contributions in cotton research. Dr Jodi Scheffler was declared the ICAC Researcher of the Year 2022, becoming the 16th winner and the first woman to ever win the award.

Dr Scheffler then made a virtual acceptance speech and the session ended at 8:39 am.

First Open Session

Reports from the ICAC Secretariat with focus on sustainability

9:15 – 10:50 am (GMT-5); Australia (Perth, AW): 10:15 pm – 11:50 pm; Europe: 14:15 – 15:50 (GMT),

Tuesday, November 29 2022

Chair: Mr Patrick Packnett, USA, Chairman of the ICAC Standing Committee

Mr Packnett opened the session at 9:17 by inviting Mr Matthew Looney, ICAC Data Scientist, to deliver his presentation on the World Cotton Market.

World Cotton Market

Mr Looney noted that the Cotlook A-Index price had risen dramatically during the 2020/21 season and did not relent through nearly the entire 2021/22 season. He indicated that prices started to retreat toward the final quarter of the 2021/22 season and continue their fall at the time of this presentation.

Price volatility is likely to remain high through the remainder of the 2022/23 season. This volatility is due to the uncertainty about global macroeconomic conditions. Mr Looney stated that if a recession materialises and production remains above consumption, we can expect to see prices remain low for the foreseeable future.

He noted that the Secretariat's current projection for consumption in 2022/23 is 24.91 million tonnes, a 3.1% decline over the previous season. Production for 22/23 is currently recorded at 25.03 million tonnes. This level of production is despite a catastrophic crop in Pakistan and the United States. He stated that India and Brazil were both reporting increased production and this has helped stave off a production shortfall in the 2022/23 season.

Mr Looney concluded his presentation by pointing out that, at this time, production is outpacing consumption and there appears to be sufficient supply for estimated demand.

World Cotton Trade

The Chair invited Ms Parkhi Vats, ICAC Commodity Trade Analyst, to deliver her presentation.

Ms Vats started her presentation with a look back at the developments of the past few seasons. She stated that with the turmoil of the past several back-to-back pandemic seasons, hopes

were high for a calm 2021/22 cotton year. However, what was witnessed was anything but calm. She recalled that at the end of the 2021 calendar year, the US-China Phase One trade agreement — which included trade in cotton — came to an end. She explained that in February 2022 the world witnessed conflict between Russia and Ukraine and this conflict was impacting energy prices and had pushed fertiliser prices up, which had downstream effects on cotton production. In March 2022, logistics companies warned of higher transportation costs and more delays, with the city of Shanghai in the midst of a two-phase lockdown in an already-constrained supply chain.

Ms Vats stated that world exports for 2021/22 were 9% lower than the previous season. However, the 2021/22 season was still above the previous 20-year average. She went on to explain that the current projections for the 2022/23 season are expected to fall by 3.2%.

She talked briefly about how the drought in the United States will likely reduce its exports in the 2022/23 season simply as a function of reduced production in the West Texas region. She also went on to explain how extreme flooding in Pakistan will likely necessitate increased imports, but this increased import would be contingent on global demand for textiles. If demand slows due to complications with macroeconomic conditions, then imports may not be as significant as they otherwise would under normal economic circumstances and a production shortfall.

Textile Strategy

The Chair invited Mr Usman Kanwar, Head of Textiles, to make his presentation on Textiles Strategy.

Mr Usman started his presentation by stressing that textiles were now a major area of emphasis at the ICAC and that the plan the ICAC had developed to support this new area of focus was ambitious but achievable.

He continued by stating how remarkable the 2021 year had been for textiles and that textile exports had exceeded \$900 billion, of which cotton exports accounted for \$18 billion. The European Union is the largest textile importer and exporter in the world, while the United States is the world largest

textile importing country with \$127 billion in 2021. He mentioned that African countries are leading cotton exporters but have yet to develop a textile value chain despite having all the necessary ingredients to build the required infrastructure.

He went on to explain in more detail the textile vision the ICAC is developing. This vision includes the B2B Textile Portal, a web-based platform designed to provide credible sourcing for buyers and supplies. Another component is The International Textiles Research Council, a group to connect universities with research departments and textile machinery manufacturers, dye manufacturers, engineers working in textile factories, and fashion designers. And finally, the 'Plenary Meeting – Textiles Plus' concept which will be a parallel track during the annual Plenary Meeting to focus on exhibitions, fashion shows, and textiles-oriented awards.

He concluded by stating that the B2B portal will be available by the end of January 2023 and that he will continue to work with delegates, coordinating agencies, and the private sector to launch this strong vision into reality.

Production and Trade Subsidies Affecting the Cotton Industry

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

Ms Ruiz explained that government subsidies for cotton included several different programmes, such as direct support to production, border protection, crop insurance subsidies and 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 \$3.5 billion dollars in the 2021/22 crop year. She explained that due to the high cotton prices in the 2021/22 season, many government assistance programs were not in effect. She further explained that this low level of assistance has not been seen since the 2010/11 season when prices reached record levels on the Cotlook A-Index.

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 import quotas or sliding rates. The United States Assistance rate was explained as well as the systems in use in India, Turkey the European Union and West Africa.

She concluded by encouraging people interested in the fully detailed analysis to access the complete report on the ICAC website in the Publications section.

ICAC Research Support

The Chair invited Dr Keshav Kranthi, ICAC Chief Scientist, delivered his presentation on the ICAC Research Support.

Dr Kranthi started with a summary of the various ICAC projects, Research Networks and Publications under direct supervision of the Chief Research Scientist. Under projects he mentioned four programs: training master trainers in Cameroon and Burkina Faso, virtual reality (VR) training, the ICAC Cotton Expert App for low-literacy farmers in 26 languages, and Sustainable yields through Regenerative Agriculture in Zambia. Under research networks he highlighted the XV Southern & Eastern African Cotton Meeting held in Mozambique and the World Cotton Research Conference-7. Finally, under publications he highlighted that the ICAC had produced a number of manuals (2) and pocketbooks (6), videos (14), PPTs (12) and VR films (3), the ICAC Expert App, the ICAC Cotton Data Book 2022 and the ICAC Recorder. He then went on to explain in

more detail each of these programs, research networks and publications.

Dr Kranthi noted that the Researcher of the Year 2022 is Dr Jodi Scheffler, a cotton genetics researcher at the USDA Crop Genetics Research Unit and Adjunct Professor at Mississippi State University in the United States.

He ended his presentation with examples from the forthcoming ICAC Cotton Databook 2022, a massive 500+ page compendium of information of cotton production, cost of cultivation, cropping systems, fertilizer use, pesticide use, water footprints, among many other subjects related to cotton.

With the conclusion of Dr Kranthi's presentation, the floor was opened to questions from delegates and the general audience.

Dr Terry Townsend posed a question to Ms Lorena Ruiz related to cotton subsidies, that it was his understanding that over half the government subsidies in 2021/22 were fertiliser subsidies to India and if that was correct what would be the impacts of those subsidies on the world cotton industry? Ms Ruiz replied that in 2021/22 we had very high prices and many government support programs were not in effect. She further replied that in 2021, India had more fertiliser support for not only cotton but other crops as well. Due to the high fertiliser prices, the Indian government was providing more money in subsidies in 2021/22 season. She explained that one of the variables we have been looking at since 2010 are subsidies given by various countries. The heterogeneity between countries is large and each country needs to be looked at individually to know how they will respond to various support measures. A general analysis is often not possible.

The second 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 given the current level of production and the estimated demand, prices were expected to stay low for the remainder of this season and possibly into the next. He further explained that given the uncertainty surrounding global macroeconomic conditions that price volatility will likely remain high through this season and was largely dependent on whether we enter a mild or major recession in the near future.

A third question was asked about government subsidies, noting that there seems to be a negative correlation between government subsidies and price. Ms Ruiz agreed that it was price that pushes subsidies up and down.

The final questions were about organic cotton: Would organic cotton gain more area and production? Would there be increased assistance to support more organic cotton? Is there any data comparing organic cotton with conventional cotton regarding water use efficiency? Dr Kranthi responded that organic cotton production globally is on the rise, although we do not have specific information of subsidies provided to organic cotton specifically. He further explained that the ICAC does not currently collect data related to water use efficiency between organic cotton versus conventional cotton; the ICAC's data on water use efficiency is aggregated to include all forms of cotton. Ms. Ruiz completed the answer on subsidies and referred individuals to the complete analysis report on subsidies to see information on a single country that did provide data on subsidies related to organic cotton.

The chair closed the session at 10:50 am.

Government Members Plenary Session

What Climate Smart, Sustainability Policies/Initiatives Have you Put in Place for Cotton and Textiles, for Example to Respond to COP26?

10:50 am – 12:00 pm (GMT-5); Australia (Perth, AW): 11:50 pm – 00:30 pm; Europe: 15:50 – 16:30 (GMT),
Tuesday 29 November 2022

Chairman: Patrick Packnett

Mr Patrick Packnett opened the session at 10:50 by inviting Mr Matthew Looney, Data Scientist at the International Cotton Advisory Committee, to provide introductory remarks for this session.

Mr Looney explained the goals and the importance of the United Nations Climate Change Conference - COP26 for the cotton industry. He noted that COP26 was a major event, held in Glasgow in November 2021, that had brought together leaders from all countries in the world to discuss, review and agree on how to step up global action to solve the climate crisis. He highlighted that the main objectives of the COP26 meeting were to commit to more ambitious targets to reduce greenhouse gas emissions by 2030; discuss measures to adapt to the inevitable impacts of climate change; and increase funding for climate action, in particular for developing countries.

Mr Looney stated that like any other crop, cotton is sensitive to the effects of climate change and its response to soil, pests and diseases. Climate change causes extreme fluctuations in temperature, rainfall, solar radiation and carbon-dioxide (CO₂) concentration. These fluctuations influence crop growth, pathogens that cause diseases, and insects that occur in the cotton eco-system.

Cotton producing and consuming countries have invested in research to understand the influence of climate change effects on cotton physiology and productivity. Although some studies have shown that the cotton crop in some regions may benefit from increases in temperatures and carbon-dioxide, climate change is likely to affect agriculture very significantly through the alteration or aggravation of biotic stress. Some studies indicate that a shift in temperature can have significant effects on each insect species – mainly distribution and abundance – but it could also influence interactions between insect species within different ecosystems. This could lead to an aggravation of the pest problem and thus an increasing use of pesticides.

The Chair gave the floor to the Delegate of the EU to present her report. She stated that development cooperation in the cotton sector remains an important element of the European partnerships agenda. The delegate mentioned that the EU and its Member States have increased their support to the cotton industry through national and regional programmes in order to boost the transformation of the sector. The EU and its Member States have provided more than 200 million euros in ongoing projects, 97% of which are in Sub Sahara Africa (90% to the C4, Cameroon and Côte d'Ivoire).

The delegate stated that the EU has established four priorities related to smallholder production and resilience, namely the development of local value addition and cotton by-products; environmental sustainability and natural resource management, including agro-ecological practices and the promotion of organic cotton production; policy dialogue with national and regional governments on sustainable and inclusive value chains; and issuing sustainable production and consumption policies (the Commission has recently issued a legislative proposal for a Corporate Sustainability Due Diligence Directive).

The EU delegate also noted that the European Commission plans to contribute to improving global market transparency in the use of fertilisers and plans to initiate discussions on the avoidance of export restrictions on the fertiliser trade. The green financing programme was launched to support research, development and innovation in face of the negative impacts of climate change, as the green economy is the tool for sustainable development.

The Chair gave the floor to the Delegate of Egypt to present her report. The delegate noted that in light of COP26, Egypt has developed educational programmes to ensure awareness of how climate change affects sustainability in the cotton sector. Egypt has focused on eco-friendly sustainable development plans in addition to supporting national breeding programs as well as developing the eco-friendly textile industry. The main policies adopted to combat climate changes impacts in Egypt are the development of new cotton varieties to ensure early maturing, high yields and salinity tolerance; reviewing the crop sowing and harvest dates; efficient

utilization of irrigation water; encouraging the recycling of cotton textiles and garments; and partnering with cotton initiatives such as BCI and Cotton Connect.

The Chair gave the floor to the delegate from the USA to present his report. In his remarks, the delegate informed that the Biden-Harris Administration is investing up to \$2.8 billion in 70 selected projects under the first pool of the 'Partnerships for Climate-Smart Commodities' funding opportunity. As a part of this initiative, \$90 million of funding will be allocated to the U.S. Climate Smart Cotton Program. This investment will enhance the industry's voluntary environmental stewardship efforts to reduce greenhouse gas emissions, soil loss, water loss, and energy use, while increasing land efficiency and soil carbon. The programme is a multi-stakeholder initiative that includes the National Cotton Council, Cotton Council International, Cotton Incorporated, the Soil Health Institute, the Soil and Water Outcomes Fund, Texas A&M AgriLife Research, Agricenter International, Alabama A&M University and North Carolina A&T State University. The US Climate Smart Cotton Program will conduct farmer education, applied research, demand-building efforts, monitoring and reporting, and finally to develop verification platforms.

The Chair gave the floor to the delegate of Pakistan to present his report. He noted that erratic weather has been a big issue for the cotton industry of Pakistan in recent years. The government is addressing climate change implications with a consolidated and comprehensive framework. The four agricultural-producing provinces in Pakistan have implemented a monitoring system and allocated funds to combat climate change effects. The government has issued a climate change policy for the agriculture sector, which addresses issues such as crop insurance; protection and management of ground water, deforestation; digital simulation models for climate change effects on agriculture production systems; developing new cotton varieties resistant to heat stress and drought tolerant; increase input and energy efficiency, and improve extension systems.

The Chair then gave the floor to the delegate of Taiwan to present her report. In her remarks, the delegate informed that Taiwan is

committed to establishing actions to combat climate change and carbon reduction. The delegate highlighted the sustainability policies developed by the government for the cotton and textile sector. Amongst those policies are that the country has implemented a 'Climate Change Response Act'; a long-term reduction goal to reduce emissions by 2050 to below 50% of the level of 2005; achieve net zero emissions by 2050; and that all government agencies will work together to promote GHG reduction, develop negative emission technologies and promote international cooperation.

The Ministry of Economic Affairs of Taiwan has put forward a net zero transition structure from low to zero carbon by providing renewable energy to industries in need, introducing

grain production technology and creating grain jobs and growth. The delegate stated that Taiwan's companies and suppliers are aligning their carbon emission targets with the targets of their international clients. In 2023, the Ministry will launch two programmes on low carbon emissions in the textile industry. The first programme has a budget of around \$2.6 million, involving around 20 companies with the goal of reducing CO₂ emissions by 46,000 tonnes. Additionally, the Ministry has commissioned the Taiwan Textile Research institute (TTRI) and the Taiwan Textile Federation (TTF) to be responsible for the programme. TTRI will focus on four strategies including material substitution, process, equipment optimisation and energy substitution; TTF will focus on designing easily recy-

clable sustainable textiles and the forming of low carbon textile supply chain alliance. The second programme will be led and carried out by textile companies themselves, with seven projects to be announced within the next two years. The government's funding for this programme is about \$2.1 million.

Additionally, this year the Ministry of Economic Affairs launched a three-year research programme on energy saving in textile processing. The overall goal is energy-saving efficiency at 1,080 kilolitres of oil equivalence and carbon emissions will be reduced by 3,300 tonnes.

The Chair thanked all delegates close the session at 12:03 pm.

Second Open Technical Session

How Can Regenerative Agriculture Contribute to a Sustainable Cotton Industry?

8:00 – 10:00 am (GMT-5); Australia (Perth, AW): 09:00 pm – 11:00 pm; Europe: 13:00 – 15:00 (GMT),
Wednesday 30 November 2022

Chairman/ Moderator: Dr Keshav Kranthi, Chief Scientist, ICAC

The Chair, Dr Keshav Kranthi, opened the session at 08:01 am and welcomed the audience members and speakers, then proceeded to the presentation from the first speaker.

Speaker: Prof. Rattan Lal, Distinguished University Professor of Soil Science, CFAES Rattan Lal Center for Carbon Management and Sequestration, Ohio State University, OH 43210 USA

Topic: Soil Health for Cotton Production and Nature Conservancy

Professor Lal highlighted that cotton is a key determinant of economic growth and development in many countries around the world and is a source of livelihood and major component of export earnings for low- and middle-income countries. Cotton has a large potential role in advancing the Sustainable Development Goals for the 2030 Agenda for the United Nations.

Similar to the drastic increase in grain crop production by adoption of the Green Revolution technologies, cotton production also

increased due to intensive inputs of fertilisers, pesticides, energy, irrigation and soil tillage. However, indiscriminate use of chemical inputs has had adverse effects on soil health and environmental quality. Therefore, a prudent strategy is to produce more cotton from less use of land, water, chemicals, energy, with less emission of greenhouse gases. The strategy is to reconcile the need to produce more cotton with the necessity for improving the environment and restoring the health of degraded soils by re-carbonisation of the terrestrial biosphere via increasing stock of soil carbon in the root zone. With its deep root system, cotton grown with conservation tillage and cover cropping and drip fertigation, can sequester atmospheric CO₂ (as humus and secondary carbonates) with long-term positive impacts on adaptation and mitigation of climate change.

Restoration of soil health by restoring soil organic carbon content can also improve soil structure and reduce the risks of flood/drought problems and of anaerobiosis at critical stages of cotton growth. However, farmers and land managers must be motivated to adopt conservation-effective cotton production systems through payments for ecosystem services.

Professor Lal stressed that policy measures, needed to upscale improved technologies for cotton production, must be pro-nature and pro-farmer. The private sector has an important role to play in translating science into

action by providing the needed inputs to make cotton production a solution to environmental issues and an important strategy of advancing Sustainable Development Goals.

During the discussion Dr Akhteruzzaman asked if cotton provided any special benefits for carbon sequestration because it is a deep-rooted crop. Prof Lal replied that although cotton is deep rooted, carbon sequestration can increase with conservation tillage and cover crops. The cotton crop alone does not produce a huge biomass and it is important to include cover crops in the cropping systems to enrich the soil with organic biomass.

Mr Rajeev Baruah asked if soil carbon can be measured accurately using satellite imagery and can be used to reward farmers for enhancing soil carbon. Prof Lal replied that there are several technologies available to measure soil carbon and it is important to identify simple, practical methodologies to assess soil carbon reserves and reward farmers accordingly.

The next speaker was **Prof. Fabio Rafael Echer**, Professor of Cotton Agronomy/Physiology, São Paulo Western University (Unoeste), Presidente Prudente, Brazil

Topic: Improving cotton's sustainability in the tropics

Brazil is the fourth largest producer and the second largest exporter of cotton in the world. Mato Grosso and Bahia account for 90% of

the area planted with cotton in Brazil, 92% of which is not irrigated and is dependent on rains. In Mato Grosso, cotton is grown after soybeans in most areas. Evaluations in commercial areas of high cotton yield in Mato Grosso and Bahia (~3200 kg ha of fibre) indicate high soil fertility at depths greater than 40 cm, especially with calcium and boron, in addition there is an absence of aluminium and high soil permeability to air in the deeper layers, which indicates a good environment for root development. In these fields, high enzymatic activity was also observed for arylsulfatase, betaglucohydrolase and acid phosphatase. The use of crop rotation is essential to increase the carbon stock in tropical soils, cycling and nutrient use efficiency, especially in sandy soils. Increasing yield is the main way to increase the sustainability of cotton over time, since this requires improvement in soil quality, which is only possible with the adoption of conservationist practices such as crop rotation. Increasing the diversity of agricultural crops is the greatest challenge for agricultural systems in the Brazilian Cerrado, and it will improve cotton's performance.

During the discussion on Professor Echer's presentation, Dr Ali Talpur pointed out that crop rotation provides the foundation for long-term weed management. He asked as to which cover crops could be recommended for Pakistan in rotation with cotton, given the fact that over the years, cotton-wheat rotation has evolved as a standard system. Prof Echer replied that Brazil grows soybean which provides excellent organic biomass. Every country will have to identify crops that are best suited to its ecology and cropping systems.

Dr Venugopalan asked if farmers were thinking about going back to long duration varieties in Brazil to get higher yields. Prof Echer replied that the current cotton crop duration fits well with the cotton-soybean rotation. Therefore, the probability of extending the cotton crop duration would not be ideal for the existing cotton-soybean rotation and farmers are not likely to revert to long duration cotton.

Dr Kamrul Islam queried if Brazilian farmers used hybrids or open pollinated varieties to get high yields and wanted to know the spacing. Prof Echer replied that Brazil grows only open pollinated varieties and does not grow hybrid cotton. Brazilian farmers have access to the third-generation varieties. The row to row spacing is 90cm in Mato-Grosso and 76cm in Bahia. Plant population was 60,000 to 100,000 plants per hectare depending on the state.

Dr Terry Townsend asked Prof Echer for clarification on his statement: 'Raising yields

is the best way to improve sustainability' in the context of organic cotton systems that are known to result in lower yields compared to conventional systems. Prof Echer replied that Brazil has large farms, that could be more than 10,000 hectares in some cases. Growing organic cotton does not appear to be a feasible option in Brazil, at least not in the Mato-Grosso state, because boll weevil is a big menace for cotton in the country and growing organic cotton on large farms could be too risky. Dr Townsend added that organic might be good for some countries or regions but not suitable for every cotton producing country.

The third speaker was **Dr Kater Hake**, Vice President, Agricultural & Environmental Research, Cotton Incorporated, USA

Topic: Regenerative Agriculture – Implications for the Textile Industry

Dr Hake explained that Regenerative Agriculture (RA) has been recently identified by textile companies as an important consumer concern. Comparing a set of 13 statements about regenerative agriculture from textile companies, two common concerns emerge – climate and soil health. These are linked because soil health can sequester carbon and expand resiliency. The Field to Market Coalition lists 5 regenerative agriculture principles: minimising soil disturbance, maintaining living roots, covering bare soil, maximising plant and microbial diversity, and integrating livestock where feasible.

Although there is no consensus on regenerative agriculture principles, definitions or certifications, regenerative agriculture can be encouraged through support of cotton production protocols that include soil health. Textile consumer concerns about Regenerative Agriculture, climate change, and microplastics offer an unprecedented opportunity for cotton, which in order to fully utilise, requires strengthening cotton's role (both production and processing) in protecting our environment.

In the discussion Mr Rajeev Baruah wanted to know the difference between sustainable and regenerative agriculture and if regenerative agriculture was being rebranded as 'old wine in a new bottle'. Dr Hake clarified that regenerative agriculture was farmer centric and that it was important for farmers to define it and not for brands and retailers.

Dr Kamrul Islam wanted to know if there were any certification standards available for regenerative agriculture. Dr Hake informed that

there were no defined standards prescribed for certification of regenerative agriculture and that organic can be considered regenerative as well. However, there are some organisations that are trying to develop a definition of what they think regenerative agriculture should be.

At the end of the questions and answer session, Dr Kranthi moved to the next item: selecting the topic for the 2023 Technical Session at the 81st Plenary Meeting.

Dr Kranthi said that the following three topics were proposed for the Technical Seminar 2023 of the 81st ICAC Plenary Meeting:

1. Women in cotton production and processing: challenges of equity
2. Recent technological innovations as gamechangers in cotton farms
3. Climate smart technologies for cotton production

The delegate of Pakistan suggested that the topics 2 and 3 could be merged for the Technical Seminar 2023. The proposal was supported by the delegates of Australia, India, Egypt, Russia and Bangladesh. The Chair suggested that topic 1 on 'women in cotton production and processing: challenges of equity' could be considered for a separate session in the 81st ICAC Plenary Meeting. The ICAC Chief Scientist was asked to merge the topics 2 and 3 for consideration of the Standing Committee.

Below is the revised topic prepared based on the suggestions made by the distinguished delegates:

Climate smart innovations as gamechangers for cotton production

The recent 'UN Climate Change Conference of the Parties: COP26', held in Scotland in 2021, and COP27, held in Egypt in 2022, reaffirmed the resolve for 'emission reduction targets for 2030' that align with reaching net-zero emissions by 2050 to keep 1.5 degrees or less of global warming within reach. Like other agricultural crops, cotton production also emits greenhouse gases (GHGs) mainly comprised of carbon dioxide (CO₂), nitrous oxide (N₂O) and methane (CH₄) that cause global warming. The total global annual emissions from cotton farms are estimated to be 57.2 million tonnes of CO₂eq GHG tonnes of CO₂eq GHGs. Recent studies have shown that several climate smart technologies have the potential to reduce GHG emissions and enhance carbon sequestration while concomitantly resulting in improvement of sustainable crop productivity. These climate smart innovations are known to play a significant role not only in enhancing environmental sustain-

ability, conserving biodiversity and rejuvenating soil health, but also in increasing cotton productivity and improving profitability.

- Such climate smart innovations include nanotechnologies to enhance fertiliser-use-efficiency, water-use-efficiency and pesticide-use-efficiency.
- Innovations on micro-irrigation, laser levelling, structured water, satellite imagery and crop evapotranspiration (ETc) based automated irrigation scheduling have proven potential to save water and enhance water-use-efficiency.
- Climate smart innovations that rejuvenate soil health, such as mass production of biochar from farm waste using the Kon-tiki-pit biochar, enhancing carbon sequestration through regenerative tech-

nologies, hand-held rapid soil testing kits, satellite imagery for carbon monitoring, drone mediated crop monitoring and robotic-sensor based precision nutrient application and pesticide application have become operational in many cotton farms across the world.

- A recent report (Cotton Leads, 2019) highlights the potential of a simple 'zero-till' technology-based cotton crop biomass in capturing CO₂ to show that 'an acre of no-till cotton actually stores 150 kg more of atmospheric carbon than it emits during cotton production, meaning that cotton's contribution to the carbon equation is net negative'.
- Technologies such as genome editing, marker assisted breeding and CRISPR-

CAS are being used to develop 'climate resilient drought tolerant and high yielding' cotton varieties.

Thus, there are several streams of promising climate smart innovations, technologies and opportunities that have either been developed and validated or are in advanced testing stages, with immense potential for increasing productivity and enhancing environmental sustainability.

The technical seminar will discuss the latest developments in implementable climate-smart technologies with focus on game-changing innovations that have the potential to enhance environmental sustainability and increase cotton production. The seminar will also discuss policies to promote climate-smart technologies and reward carbon-farming.

Third Open Session

Regulatory Policies by Governments that Could Negatively Affect the Consumption of Natural Fibres

10:00 –12:00 pm (GMT-5); Australia (Perth, AW): 11:00 pm – 01:00 am; Europe: 15:00 – 17:00 (GMT),

Wednesday 30 November 2022

Chairman: Mr Peter Wakefield

The ICAC Executive Director, Mr Kai Hughes, introduced the Chair for this session, Mr Wakefield, who opened the session organised by the Private Sector Advisory Council by assuring that the purpose of the session is not to criticise any other competing fibre. The session is organised to highlight that we need all fibres to be treated equally in every respect.

Mr Wakefield then provided a quick description of how the PSAC is constituted and that membership of the PSAC is open to international associations, regional associations and national associations. Both NGOs and qualifying organisations from countries that are not ICAC Members can be granted observer status for a period of one year. Each Committee has a Chair and a Vice Chair, plus one other elected individual, and all three sit on the Executive Committee. He said the PSAC was created because cotton is a complex industry and there is a lot of confusion regarding cotton and that all fibres must be treated the same way.

In July 2022, the German Parliament passed

the Law on Corporate Due Diligence to Prevent Human Rights Violations in Supply Chains, which will affect the entire cotton industry, potentially negatively. Going forward, he said, the big question is: *What governments will enact similar laws in their own countries?*

Mr Wakefield introduced Mr Cliff White, Director of the Australian Cotton Shippers Association, as the first speaker. He stated that it was clear to see that prior to our recent meetings the level of awareness between committee members concerning legislation that can potentially restrict access for cotton products was extremely limited. In the particular cases of the EU commission and German government, policies were debated or are being debated without establishing consultations with the industry representatives, so the industry needs to be heard now, if it is not already too late. Europe's Product Environmental Footprint (PEF) does not present a level playing field for manmade and natural fibres. The progress of the PEF legislation has been delayed due to Covid-19 but remain unsure of the final timeline.

The next speaker, Mr Francisco Ferreira dos Santos, an agronomist and CEO of the JFS Group in Mozambique, spoke on behalf of the Producers and Ginners Permanent Committee. The European Commission is talking

about how to present product information to consumers. To substantiate green claims, The European Commission says brands must label their products using the same PEF methodology to show how environmentally sustainable the product is.

The risk here is not necessarily the natural fibres versus polyester debate, he said, but rather, the fact that the PEF methodology as it stands today does not take into consideration key elements like plastic waste, microplastics, circularity, renewability, and biodegradability, amongst others, which set natural fibres apart from man-made fibres. If these elements are included, then we may expect that man-made fibres may get a lower score. Finally, he pointed out that the EU is the biggest consumption market and if the PEF methodology is not adjusted, cotton products may get downgraded against other manmade fibres.

The next speaker, Mr Muhammad Anees Khawaja, is Vice Chair of the All-Pakistan Textile Manufacturers Association and spoke on behalf of the Spinners, Weavers and Machinery Manufacturers Permanent Committee. He wondered whether there were enough studies showing that cotton is a sustainable, natural fibre and how many families globally depend

on it for a living. He closed his comments by saying that much of the textile supply chain is based in the developing and underdeveloped countries, which have other more concerning issues, and that we need to consider whether these countries have enough resources and training to implement the new changes.

The final speaker, Mr Nate Herman, oversees the American Apparel and Footwear Association's Policy department and spoke on behalf of the Brand and Retail Permanent Committee. He began by stating that the PEF will be used as a basis of European Union's Green Claims Initiative for sustainability labelling, for clothing and other products and will likely be used as basis for Europe's mandatory human rights and environmental due diligence proposal. He pointed out that other countries will likely adopt the PEF as a basis for their own sustainability regulations including Unites States. The problem is that the Product Environmental Footprint focuses on the environmental impact on material only from cradle to gate i.e. from the creation of the material until it ends up in the final product. That puts natural fibres, particularly cotton at a significant disadvantage. Currently, the PEF ignores the use-phase of the garments, such as the fact that cotton doesn't have to be washed nearly as much as synthetics. Therefore, the PSAC should lobby for the European Commission to ensure that its product Environment Footprint captures the full environmental impact of material by measuring the environmental impact of the material during its entire life cycle.

Mr Wakefield then opened the floor for questions and welcomed Ms Emily Pomelia

from the Brunswick Group, who provided the PSAC with information on the working methodologies on the EU when preparing legislation and agreed to take questions. She was asked about the timeline for the Substantiating the Green Claims legislation and said it has been postponed until 2023. It has already been introduced and debate will begin early next year by members of the European Parliament.

Mr White was asked who stand to be directly impacted by these policies are informed about these policy changes and he replied that it's not just about cotton merchants but about the whole supply chain.

Mr dos Santos was asked how difficult it will be for an average cotton producer in Africa to understand the complexity of the German and EU laws and comply with them. He acknowledged that it will be a challenge but that the private sector has a role to play there and can help people adapt to the changes.

Mr Khawaja was asked, after pointing out how much of the textile supply chain is based in developing regions, whether businesses there will be able to adopt the changes anticipated by the EU and German government. Unfortunately, he replied, the industry cannot commit to adapting at the pace the EU wants. The commitment is there, he said, and the technology will be adopted but it is not going to be a timeline that is being proposed.

Mr Herman was asked about The Norwegian Consumer Authority, which has taken an action against an environmental label that the Sustainable Apparel Coalition was testing out to translate the Higg Index and MSI into a consumer friendly eco label, and whether that could be good news for cotton. He replied that

the Higg Index doesn't capture the full impact of the fibres, especially man-made fibres, which gives cotton advocates an opportunity to raise this point again.

Mr Edmonds was asked what we can do at this advanced stage of the regulations, replying that the EU Commission is to conversation. She cited the 'Make the Label Count' campaign has already engaged the EU on this topic.

The final question was asked to all speakers for their comments: How will the policies impact their sectors?

Mr dos Santos said it depends on the implementation rate and how far the legislation will go, and that it might have a tremendous impact on businesses if they don't comply with the all the criteria implemented.

Mr White replied by saying that the biggest challenge is how they bring all this together and collaborate to communicate this situation.

Mr Khawaja added that we need to consider socio-economic reforms and how women can be empowered.

Mr Herman said that we need to speak with a single voice and that If we can do it for this issue, we can do it for other issues.

The Chair then read out a comment from the chat, which said we need to partner with other organisations as they develop substitute blends, such as one that incorporated 35% pineapple fibres with 65% cotton in a blend.

The Chair announced the PSAC's Final Statement will be available on the ICAC website and made a plea for people to read and distribute it, then concluded the session at 12:00 pm.

Steering Committee

1 December 2022 at 8:30 (GMT-5); Australia (Perth, AW): 09:30 pm; Europe: 13:30 (GMT),
Thursday 1 December 2022

Chairman: Mr Patrick Packnett, USA, Chairman of the ICAC Standing Committee

Mr Patrick Packnett, Chair of the Standing Committee, chaired the meeting which began at 8:30 am.

1. Adoption of the Agenda

The Chair started by thanking the delegates for their commitment to attend the meeting,

then asked for adoption of the agenda. The delegate from EU raised a concern on agenda item 1 concerning the update on — the Executive Director's whistle-blower complaint against the Standing Committee Chair. She indicated that the matter should be addressed in a separate meeting when the current Chairman and the Executive Director are not present since they are parties of interest. The delegate from Pakistan was of a contrary opinion and felt that the issue should be addressed in this meeting for the members to address the concerns raised. After deliberations, a

majority of the delegates were of the opinion that the agenda item should be deliberated at a separate executive meeting of the Steering Committee under the new leadership without the presence of the current Chairman and the Executive Director. The agenda was adopted with the exclusion of agenda item 1.

2. Election of the Standing Committee Officers – Working Paper No. 1

The Chairman requested that the Steering Committee approves the recommendation of the Standing Committee to appoint HE Aly Touré of Côte d'Ivoire as Chair, and Mr

Azmat Mahmud Kan of Pakistan as Vice Chair. The recommendation was approved by the Committee.

3. Establishment of an International Textiles Research Council (ITRC) – Working Paper No. 2

The Executive Director introduced the topic by mentioning that the purpose of ITRC was to add value to existing and potential new consuming country members by strengthening the textile sector operations within ICAC.

The ICAC Head of Textiles, Mr Kamar Usman, reiterated that the value of textile industry in the value chain, had crossed the \$900 billion mark. He reported that as a result, ICAC has developed a strategy for textiles with a business portal which would include profiles of textiles businesses in Member countries. Mr Usman added that ITRC will comprise universities, research organisations, chemical manufacturers, allied and service industries, amongst other stakeholders, under one roof. The governance model will comprise of a board of directors, executive committees and technical committees. He then submitted the proposal to the Steering Committee for approval of establishment of an International Textiles Research Council (ITRC).

The Delegate from Pakistan appreciated the proposal but recommended renaming it as International Textiles Research Association and that the ICAC Head of Textiles should act as the Executive Secretary, reporting to the Executive Director of ICAC, thus keeping everything within the ICAC.

The Delegates from US, EU, Australia and Russia were of a contrary opinion and said the ICAC should utilise its current structure

to implement these objectives and use an intergovernmental approach rather than develop a bureaucratic organisation.

Mr Usman informed the delegates that the cotton industry has developed a similar association — the International Cotton Research Association (ICRA) — and ICAC should establish one for textiles which would mirror the structure of ICRA.

The Chair said that since they could not reach consensus, the Secretariat should take into account the concerns raised by the delegates as it continues to formulate its textiles strategy.

4. Topic of the Technical Seminar for 2023 – Working Paper No. 3

ICAC Chief Scientist Dr Keshav Kranthi submitted the three topics to the delegates for consideration;

1. Women in cotton production and processing: challenges of equity
2. Recent technological innovations as gamechangers on cotton farms
3. Climate-smart technologies for cotton production

The delegate from Pakistan proposed a merger of topic 2 and 3.

The delegate from Russia inquired when and where the Technical Seminar will be held. Dr Kranthi clarified that the Technical Seminar is an integral part of ICAC Plenary Meetings and is meant to address Technical issues, ideally in cotton production but it can be extended to the entire value chain, inclusive of economic and socio factors.

The Chairman asked the Secretariat to consider including topic one, which is a socio-economic issue, as one of the discussion

topics for the 2023 Plenary Meeting.

The delegates unanimously agreed on merging topics 2 and 3. Dr Kranthi will revert back with suitable wording to reflect this.

5. Procedure for Composing the Final Statement of the Plenary Meeting – Working Paper No. 4

The Executive Director submitted a proposal to the delegates for composing the Final Statement of the Plenary Meetings. He proposed that one week after the Plenary Meeting concludes, the ICAC Secretariat will distribute a first draft of the Final Statement via email to the official delegations in the five official languages of the organisation. The Heads of Delegations will have a week to send their requested edits via email and then a revised version of the Final Statement will be distributed to all official delegations. If there are no major changes, the Final Statement will be deemed ‘final’ by the Chair who presided over the previous Steering Committee.

The delegates approved the process to be followed for the 80th virtual Plenary Session but agreed to discuss in subsequent Standing Committees before the next Plenary Meeting.

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

The Executive Director appealed to delegates who have outstanding assessment fees to please pay them as soon as possible to facilitate the smooth operation of the organisation.

This plea was seconded by the Chairman, who requested that delegates engage with their respective Ministries and facilitate the immediate payment of outstanding assessment fees.

There being no other business the meeting was closed at 09:25 Am.

ATTACHMENTS

Working Paper 1

Election of Standing Committee Officers

Recommendation from the Standing Committee to the 80th Plenary Meeting of the International Cotton Advisory Committee

A hybrid meeting of the ICAC Nominating Committee was held on 28 September 2022 to propose the officers for the Standing Committee for the coming year. Delegates from Argentina, Australia, Egypt, European Union, Pakistan, South Africa, Russia, Sudan, Switzerland, Taiwan, Türkiye and the United States participated. Mr Patrick Packnett 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, HE Ali Touré, Permanent Representative of Côte d'Ivoire to International Commodity Organizations, as Chair.

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

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

There was consensus to nominate Mr Azmat Mahmud Kan, Trade Minister, Embassy of Pakistan, as Vice-Chair, from the end of the 80th Plenary Meeting to the end of the 81st Plenary Meeting.

Accordingly, the Standing Committee proposes the following officers to the Steering Committee for the period from the end of the 80th Plenary Meeting in 2022 to the end of the 81st Plenary Meeting in 2023:

- HE Aly Touré, Côte d'Ivoire, as Chair
- Mr Azmat Mahmud Kan, Pakistan, as Vice Chair

Working Paper 2

Establishment of International Textiles Research Council (ITRC)

Dear Member,

The ICAC has always been responsible for representing the entire cotton supply chain including textiles, buying houses, retailers and brands but it hasn't always done as well at that mission as it could have. There has always been a need for the ICAC to offer exceptional value to consuming countries, enabling Member governments to take full advantage of benefits of textile value chain to create employment and facilitate industrialisation in their countries. Realising the potential that textiles brings, the ICAC has committed itself to prioritising textiles as much as it does production.

As a part of the strategy for the development of a global textiles value chain, the ICAC has been developing a number of initiatives to benefit Members:

1. **Country Profiling:** The objective is to showcase each country by providing the necessary information related to textiles, such as general economic indicators; policies governing textiles, commerce, investment, import tariffs; social and environmental legislations; unilateral concessions; drawbacks, temporary importation schemes etc.
2. **B2B Portal:** The objective is to provide a credible source for new buyers and suppliers; to generate more business; and to connect companies across the value chain including core textiles, buying houses, allied textiles industries and the services sector.
3. **Textiles** – There will be parallel 'Plenary Plus' track during the annual Plenary Meeting to focus on exhibitions, fashion shows and textile-oriented awards.
4. **International Textiles Research Council (ITRC):** The ITRC has a long set of objectives: to connect universities with the research departments at textiles machinery manufacturers; dye and chemical makers; engineers working at textiles factories; and fashion designers. The ITRC will provide a forum for researchers, engineers, technologists and students working in textiles and allied industries in order to share knowledge on new technologies; provide solutions to challenges in existing textile processes; collaborate on research by holding con-

ferences; issuing publications; creating forums; providing leadership for sustainability; creating new standards; and dissemination of information.

Recommendation:

With this paper, a draft document for the establishment of the International Textiles Research Council is attached for the review of Members. The ICAC requests that Members provide their feedback and if found to be in order, that approval be granted during the Steering Committee meeting at the 80th Plenary Meeting to be held virtually from 29 November to 1 December 2022.

Kai Hughes, Executive Director
Kanwar Usman, Head of Textiles

International Textiles Research Council (ITRC)

There is a need to provide a forum for researchers, engineers, technologists, fashion designers and students working in textiles and allied industries in order to:

- Share knowledge on new technologies,
- Provide solutions to issues in textiles processes,
- Collaborate on research through holding conferences,
- Issue publications,
- Create forums,
- Provide leadership for sustainability, and
- Create new standards and dissemination of information

To fill that need, the International Cotton Advisory Committee (ICAC) will create the International Textiles Research Council (ITRC).

Articles of International Textiles Research Council

Introduction

International Cotton Advisory Committee (ICAC)

Formed in 1939, it is the only intergovernmental body for cotton producing, consuming and trading countries recognised by the United Nations (UN).

The ICAC was formed by the governments to deal exclusively with technical, statistical and policy matters related to cotton. It acts as a catalyst for change by helping member countries maintain a healthy world cotton economy; provides transparency to the world cotton market by serving as a clearinghouse for technical information on cotton production; and serves as a forum for discussing

cotton issues of international significance. The ICAC has currently 25 Member governments, including the European Union.

ICAC has provided significant services to the cotton value chain; it is the premier source of data on the global cotton industry. The organisation has several networks used to disseminate cotton research and statistics, and is involved in a number of innovative projects around the world.

ICAC and the Textiles Value Chain

ICAC has always been responsible for representing the entire cotton supply chain — including textiles, buying houses, retailers and brands — but it hasn't always done as well at that mission as it could have, focusing almost exclusively on cotton production. There has always been a need for the ICAC to offer exceptional value to consuming countries, and to encourage and enable cotton producing countries to engage in textile manufacturing to take full advantage of benefits it provides, especially for employment and industrialisation.

Therefore, the ICAC — which has always provided leadership for cotton and now will do the same for global textiles value chain — will serve as a think-tank to deliberate on issues and propose solutions to Member governments.

It is also important to provide leadership in research and development — including manmade fibres and filaments manufacturing, machinery manufacturing, chemical manufacturing and accessories — to empower engineers, technologists and fashion designers.

The textiles value chain is facing a number of challenges. Some affect a specific country or region, but there are several that are global issues, including sustainability. Textiles manufacturing has been subject to criticism in the past, but textile stakeholders have been doing what they can with limited resources. However, multiple organisations — most of them for-profit — have developed a host of certifications and audits, which are both resource- and time-consuming. It is important that the ICAC protect the textiles value chain from audit fatigue and audit duplication. Further, multiple stakeholders have large energy and water requirements, which is an issue when it comes to sustainability. Affordable solutions are also required for SMEs; otherwise the textiles industry will be limited to a few countries and a handful of large companies.

ICAC, through the ITRC, will provide the needed leadership for all organisations in the textiles value chain and allied industries.

Private Sector Advisory Council (PSAC)

The recently constituted PSAC is the successor to the Private Sector Advisory Panel (PSAP), which was comprised of individuals from the private sector of Member governments. The PSAC, on the other hand, consists of national, regional and global organisations that will facilitate interaction between the private sectors of Members and also the governments.

PSAC is the only organisation in the world that has representation from every sector of the cotton and textiles value chain and is represented by four Permanent Committees: Producers and ginners; merchants and allied industries; spinners and textile manufacturers; and retailers/brands.

Three representatives from each of the four Permanent Committees of the PSAC serve on the Executive Committee, which will interact directly with Member governments through the ICAC Standing Committee and will engage with during ICAC Plenary Meetings.

Preamble

The ITRC was created after:

- **Considering** the unique role of textiles industry to cater the United Nations Sustainable Development Goals;
- **Realising** research is carried out in silos, and that there are weak academia-industry linkages especially between research and its application, as well as a lack of leadership and a collective forum for research and development;
- **Perceiving** textile sector's potential to spur industrialisation;
- **Recognising** the opportunity to increase trade for Member governments;
- **Acknowledging** textiles as engine of growth especially for value addition and creating massive employment for women;
- **Taking note** of new challenges and opportunities provided by the environmental and social matters related to textiles and allied industries;
- **Creating** awareness and providing solutions for sustainable textile production while improving the traceability and labelling;
- **Providing** new solutions for the compliance, sustainability and technical matters;
- **Recommending** solutions for energy consumption and effluent water treatment; and
- **Deciding** to provide a worldwide forum

to textiles value chain, from creation of the fibre to end of the life of the finished product.

Rules of Business / Articles Governing the International Textiles Research Council

Mission Statement

To integrate and augment the research carried out in textiles and provide leadership in areas of innovation and technical solutions for sustainable textile production.

Objectives

1. Creating a joint platform among the academia and textiles value chain
2. Facilitating the research carried out by various textile research universities, institutes, organisations and companies
3. Providing a global forum to integrate and showcase the work carried out by universities; research organisations; institutes; compliance organisations and allied industries including machinery manufacturers; dye and chemical manufacturers; and fibres (natural, artificial and synthetic)
4. Facilitating networking between academia and industry
5. Coordination between universities, research organisations, and the research departments in allied industry organisations
6. Holding regional meetings and/or exhibitions and/or fashion shows
7. Providing opportunities to showcase new products at exhibitions and digitally on the ICAC website including the creation of special sections for designers
8. Disseminating information through the website and publications
9. Catering to the needs of all stakeholders in the textiles value chain
10. Facilitating virtual and in-person training by universities and research organisations
11. Providing access to vocational training institutes
12. Developing criteria for various awards for innovation and improvements in quality, productivity and sustainability
13. Creating a dedicated Sustainability Mission for Textiles
14. Carrying out a Life Cycle Assessment of the textiles value chain to assess various fibres, technologies, processes, and

water/energy consumption

15. Suggesting ways to improve the sustainability of textiles value chain
16. Creating a platform to share new ideas and establish venture funds
17. Providing networking for collaboration on
 - a. Curriculum development
 - b. Short courses
 - c. University activities
 - d. Research papers
 - e. Testing and quality control
 - f. Quality assurance
18. Developing new compliance standards and restructuring compliance methodologies
19. Standardising compliance requirements to avoid audit fatigue
20. Developing a sustainability index and to linking it to traceability
21. Comparing various energy and water-treatment solutions
22. Encouraging the exchange of researchers between Member governments
23. Creating Student Exchange Programmes
24. Providing a forum for universities, research organisations, institutes, allied industries research departments and PSAC Member Associations to develop and complete projects

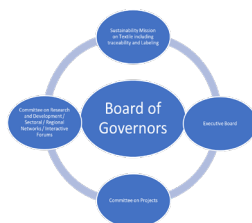
Structure

The structure of the ITRC would be three layered: universities/institutes; research organisations and the research departments at private sector businesses; and textile professionals such as engineers, technologists and fashion designers.

The ITRC's main objective is to share knowledge and research, therefore, the Upper House of the Council would be comprised of only the researchers from any of the areas of textiles including fibres; machinery; chemicals; yarn; knit/woven fabrics; processed fabrics garments; production processes; and technical textiles in universities, departments, research organisations and institutes.

Membership will be open to individuals working in any of the fields mentioned above.

The Structure of the International Textile Research Council (ITRC) would be as follows:



Governance Structure

The highest decision-making platform will be the Board of Governors (BoG). The BoG can form committees and will be assisted in its operations by a number of sub-committees as deemed appropriate. BoG along with the committees would constitute the ITRC. BoG would be responsible for the overall implementation of its objectives.

The ICAC Executive Director will be the President of the BoG and any person from textiles value chain can be the Chairperson, who will be responsible for ITRC operations.

Composition of Board of Governors

The BoG will be comprised of a Vice Chancellor, a Rector and a person nominated by the Vice Chancellor who works in the Textile Department at a university (Assistant Professor, Associate Professor or a Dean). Further, Head of Research Departments of Research Organisation, Textile Institute. Moreover, Head of the Research Department of Fiber, Filament Manufacturer, Machinery Manufacturer, Dyes and Chemical Manufacturer, Accessories, Energy, Water Effluentment etc. Every university joining the ITRC would have one seat on the BoG.

Executive Board

An Executive Board — comprising the ITRC Chairperson and Chairs of the various Committees of ITRC and the PSAC — would be the principal administrative body for discharging the objectives of the Council. Matters pertaining to research, formulation of proposals, coordination, communication, administration of projects, and budgeting would be taken up by the Executive Board and sent for approval of the BoG.

Office

The registered office address of the International Textiles Research Council will be 1629 K Street NW, Suite 702, Washington, District of Columbia, 20006-1635, USA.

Secretariat

Support will initially be provided by the ICAC and the Universities having the Chair of the BoG and the Committees. Efforts will be made to establish a permanent sub-secretariat

for the ITRC.

Rules of the Business of the BoG/Statement

The mandate of the ITRC would be to provide a global platform to share knowledge across the entire textiles value chain including allied industries.

The textiles value chain has also been facing the issues pertaining to sustainability, so the ITRC would also establish a 'Sustainability Mission on Textiles' to provide guidelines and definitions, as well as identify problems and solutions. The ITRC would also facilitate a holistic review of all compliance regimes and would make an effort to reach to a common sustainability standard including the targets for the future.

The Board of Governors would also establish a system to involve the professionals working in the entire value chain to share their ideas, views and recommendations on topics as decided by the BoG.

Notwithstanding the Rules of Business, the functions of the BoG may include but are not limited to:

- i. Coordinate inter-university research
- ii. Provide a platform to members to share their research work
- iii. Establish industry-academia linkage
- iv. Publish research
- v. Arrange trainings
- vi. Hold conferences and meetings
- vii. Provide leadership to various functional committees
- viii. Provide solutions to the issues faced by the textiles value chain
- ix. Form committees and task forces to discharge the objectives of the ITRC
- x. Discuss issues to provide solutions for energy consumption, chemicals and effluent water
- xi. Develop proposals to carry out projects in Member countries
- xii. Establish Regional and/or Sectoral Networks to hold meetings
- xiii. Support the ICAC in holding its Annual Plenary Meeting
- xiv. Create courses for different audiences of textiles value chain and hold them regularly in Member countries
- xv. Facilitate exchange programmes for researchers and students
- xvi. Report on the activities of the ITRC during Plenary Meetings

Membership of ITRC

The membership of the ITRC would be open to textile universities, textile departments, and textile research organisations. Membership would also be available to people working in the textiles value chain, subject to certain conditions.

Membership of BoG

Any textile university, textile department of any university, research organisation or research institute can be member of the BoG. The ICAC can extend invitations or the universities may apply. There will be no restriction on the number of universities or research organisations from an ICAC Member country.

The universities from non-Member countries may apply and can be given observer status subject to approval of the Executive Board or BoG. Universities at non-Member countries may be admitted, subject to a fee as determined by the BoG.

Corporate members and compliance organisations may have observer status in the BoG.

Membership of Committees

Universities and corporate members may become members of the Committees.

The universities from non-Member countries may apply and can be given observer status subject to approval of the Executive Board/BoG. Universities in non-Member countries may be granted Membership subject to a fee as determined by the BoG.

Compliance organisations would be encouraged to be part of the Committees.

Corporate Membership

The research departments of companies in the textiles value chain, including allied industries, may apply for the corporate membership.

Corporate Membership is to be only available to heads of research departments at textile machinery manufacturers, chemical manufacturers, fibre manufacturers, energy suppliers and water treatment plant manufacturers.

Membership for Experts/Professionals/Students

Individuals in the textiles value chain may apply for individual membership and depending on their interest and expertise, may join different committees. However, individual expert members may not be entitled to vote, although they will be able to communicate and provide their views and expert opinion on the subject matter. Importantly, they will be able to share their research work.

Executive Board

The Executive Board shall comprise the following (however, the BoG may choose to include additional members).

- i. Chairperson of BoG will be Chair of the Executive Board
- ii. Chairperson of Committee on Research and Development / Sectoral / Regional Networks / Interactive Forums
- iii. Chairperson of the Committee for Projects
- iv. Chairperson of the Technology Mission on Sustainability
- v. Chairperson of the Permanent Committee for Textiles at the Private Sector Advisory Committee
- vi. Chairperson of Permanent Committee for Retailers at the Private Sector Advisory Committee
- vii. Head of Textiles at the ICAC
- viii. Any other members as deemed necessary by the BoG

The Chairperson, in case of absence, may nominate any senior member of the committee to attend the meeting of the Executive Board. Members can nominate any senior member of their Committee to attend meetings of the Executive Board.

Selection / Election of Chair of ITRC

The ICAC may select the first Chair or the Executive Director ICAC being the President of ITRC may serve temporarily for a period of [12 months] to establish the ITRC and hold the first meeting of the Council to select the Chair of the ITRC.

Within [12] months, the Chair would seek nominations from member universities and research organisations for the selection of the Chair.

Members may select the Chair unanimously or may opt for elections. Every organisation on the BoG would have one vote. Members may opt to conduct the elections on the same day or the next meeting. Voting rights will only be available to universities and research organisations.

Chairpersons of the Executive Board and Committees Constituted by the Board of Governors

The Chair of the ITRC will be the Chair of the Executive Board.

For Committees, the Chair of the BoG or his nominee would chair the first meeting of the Committee and would request to volunteer or propose a nomination. The Members may

choose a Chair unanimously.

In Committees, corporate members and compliance organisations would be allowed to vote. Every university, research institute, research organisation, corporate member and compliance organisation would have one vote.

If the Chair of ITRC or Chair of Committees Leaves the Parent Organisation

Should the Chair of Committees leave the parent organisation, the post will be vacant and a new chair will be selected.

Tenure of the Membership and Chair of the Committees and Chair of ITRC

The Chair of ITRC and Chair of Committees would have a tenure of three years which may be extended for another term of three years. Any Chair may have a maximum of [two] terms.

Meetings of the BoG, Executive Board, Regional and Sectoral Networks and Committees

A minimum of one meeting of Committees and one Meeting of the Executive Board and BoG would be held each year. However, the BoG from time to time may review the number of meetings to be held each year.

Members will be notified at least two weeks before a meeting is held.

An extraordinary meeting can be requested by Chair or 1/3 of the Members on short notice.

Approval of the Chair shall be required to call for a meeting. However, the Chair of ITRC and the President of ITRC may request a meeting.

Setting Agenda for the Meetings

The Chair of the Committees may develop the agenda by consulting with respective Members of the Committee and the ICAC.

Decisions of the BoG, Executive Board and Committees

It would be preferred that decisions are taken with mutual consent and are unanimous, however, if it is not the case then decision of the majority would prevail. The Committee may then refer the case to the Executive Board, and in the case of the Executive Board, the matter may be referred to the BoG, which is final. In case of split decision in the BoG, the decision of majority will prevail. In case of a split decision, the quorum shall be 50% of the overall Members.

Quorum

A Quorum for all Committees shall consist of one-third of the Members.

Committees

The ITRC shall consist of the following Committees; however, the BoG may create and abolish any Committee or change the Terms of Reference (ToR) of any Committee. The Committees shall be chaired by a Chairperson, and if required then BoG may create a post for a Vice Chair. The ICAC Head of Textiles will be a Member of each Committee.

1) Sustainability Mission on Textiles (including traceability and labelling)

The overall objective shall be to provide a leadership in sustainability, traceability and labelling and make an attempt to devise unified guidelines for sustainability, traceability and labelling and create a sustainability index.

Mandate:

- a. The Committee will coordinate the work carried out by member organisations in the areas of Sustainability, Traceability and Labelling
- b. Review Member Countries' laws and regulations and devise a common set of rules acceptable to all Member countries
- c. In consultation with the PSAC, devise traceability methods and create a Sustainability Index
- d. Review the processes and process flows of machinery, energy and chemicals in consultation with machinery and chemical manufactures to potentially develop best practices and guidelines

2) Committee on Research and Development/Awards/Regional Networks/Interactive Forums

The objective of this Committee would be to coordinate research carried out by universities, research organisations and research department of corporate organisations and share it with the technologists and engineers.

Mandate:

- a. Share the research across the value chain and encourage the filing of patents
- b. Disseminate information among stakeholders, especially textile engineers and technologists
- c. Establish an Editorial Board to publish papers and encourage research reporting and writing
- d. Provide solutions to complicated matters of process flow and machinery design
- e. Provide leadership in reducing costs
- f. Create Regional (and where required,

Sectoral) Networks and hold meetings on regular basis

- g. Develop an interactive online forum to encourage communication across the value chain
- h. Provide support to the ICAC for its annual Plenary Meeting by suggesting potential speakers from universities, research organisations and the research departments of corporate organisations
- i. Establish a Sub-committee on Awards that will be presented during the Plenary Meeting of the ICAC
- j. The Committee may consider reviewing testing methods
- k. The Committee may consider creating a special Sub-committee on Technical Textiles
- l. Review the sustainability of various fibres and provide guidelines
- m. Carry out an LCA of various fibres and processes
- n. Encourage and facilitate exchange programs for researchers and students

3) Committee on Projects

The objective of this Committee shall be to support Member governments to identify issues and prepare projects for consideration of governments and donors

Mandate:

- a. The focus will be to develop projects on:
 - Sustainability,
 - Traceability,
 - Labelling,
 - Promote research and development,
 - Research based proposals,
 - Trainings,
 - Infrastructure,
 - Effluent water,
 - Reduced energy requirements,
 - Process flows,
- b. Develop projects on the recommendation of Member governments of the ICAC
- c. Provide project support to ICAC Members
- d. Identify various issues and develop projects for the consideration of donor agencies

- e. identify human resources and nominate Members for the development and execution of projects including evaluation once complete

4) Accounts

- a. Any fees or monies collected on behalf of the ITRC shall be accounted for in a separate account held by the ICAC. It shall be audited annually.
- b. The ICAC Accountant shall act as Treasurer.
- c. The ICAC shall nominate two persons to act as signatories on the account.
- d. The Treasurer will open separate accounts for each project
- e. The membership fee and its record will be maintained by the Treasurer.
- f. The ICAC may charge an allowance for the overall development of ITRC.

Membership Fee

There will be no membership fee for textile universities, research organisations and ICAC Member governments.

There will be an annual fee for textile universities, research organisations and Non-ICAC Member governments.

Corporations will be charged a fee to join the ITRC.

Experts, professionals and students will be charged an annual fee; however, their access will be limited and fee structure will be different for Member and non-Member countries. The fee will be determined on the recommendation of Executive Board and with the approval of the BoG and ICAC.

The Executive Board may review the annual fee from time to time.

The BoG and President have the power to exempt anyone from the fee for a limited period not to exceed three years.

The volunteers working for the ICAC and providing useful data, information and support can be exempted from the membership fee by the ICAC.

Suspension

Should an ICAC Member government become suspended due to non-payment of assessment fees, any associated university, research organisation or corporate member which is a Member of the ITRC will be granted observer status for a period of two years.

Should a suspended ICAC Member government be reinstated to the ICAC, any associated suspended members of the ITRC or of its constituted committees may apply to be reinstated.

If a Member government is involved in any contracted project or activity involving the ICAC at the time of its suspension, that project or work will continue until the end of the contractual agreement.

Any corporate member indebted to the ITRC/ICAC for any fees for a period of six months shall be suspended from membership until the debt is paid in full.

Resignation

Any member can resign at any time in writing by email or letter to the Chair of the BoG or the President.

In the case of resignation, a Member must fulfil its financial obligations before the resignation can be accepted.

A Member also cannot resign if they are a party to any ongoing contracts, agreements, projects or any similar work of the ITRC.

This does not take away the right of the Executive Board and the ICAC Secretariat to suspend the ITRC member in similar situations.

If any Member resigns, they will lose all rights and privileges of membership.

The Executive Board and/or the ICAC Secretariat may cancel the registration/membership of a member organisation and may refund at their discretion any registration fee paid (if applicable), proportionate to the unexpired period in the year of the cancellation.

Dissolution of the ITRC

The agreement of two thirds of members of the BoG is required to dissolve the ITRC. Any excess ITRC funds shall be credited to the ICAC.

Language

The principal language to be used in correspondence and in meetings will be English. However, consideration should also be given to providing interpretation services and document translation at meetings to ensure maximum participation from member organisations.

Amendments

These Articles may be amended by the Executive Board and confirmed by consensus by the BoG and President of the ITRC.

Working Paper 3

Proposed Topics for the 2023 Technical Seminar

Recommendation from the Secretariat of the International Cotton Advisory Committee

The following topics are proposed for the 2023 Technical Seminar of the ICAC Plenary Meeting:

1. Women in cotton production and processing: challenges of equity
2. Recent technological innovations as gamechangers on cotton farms
3. Climate-smart technologies for cotton production

Women in cotton production and processing: challenges of equity

Agriculture is believed to have evolved largely due to women, as they may have been responsible for the earliest domestication of crop plants. A study conducted by the International Trade Centre (ITC) showed that women across the world are mostly employed in cotton farms for picking, catering, planting, and field management. According to ICAC data, globally, women own 39.3% of land for cotton farms and may constitute 60% to 70% of the work force on cotton farms in developing countries. The ITC study points out that women are paid less than men and these gender-based wage disparities are observed in many countries. About 75% of garment workers globally are women, yet they are often underrepresented in leadership positions in their workplaces and communities. The world is becoming increasingly aware of the fact that empowered women not only empower society, but also catalyse its growth. A study by the DFID (2010) showed that the total agricultural output of Africa could increase by up to 20% if women's access to agricultural inputs were equal to that of men. Although women play such a pivotal role in cotton production and processing, their contribution is often overlooked in social, economic, and political spheres. Women are far less empowered than men because they face structural barriers that limit their access to land, information, finance, infrastructure, technologies and markets. This technical seminar will discuss ways to mainstream gender equity and women empowerment in cotton production.

Recent technological innovations as gamechangers on cotton farms

Scientific advancements in the past few years have led to innovations in all fields including

agriculture and cotton production. Technological innovations hold the key to progress in agricultural productivity and sustainability. Innovations that are establishing themselves as game-changers relate to communication technologies; mobile farm applications; social media platforms; virtual reality training modules; weather prediction and forecasting; robotics-based machinery (especially for small holders), drone-mediated crop monitoring and pesticide application; remote sensing and management; sensors and decision support systems for pest management and nutrient management; cloud computing; digital technologies to access global and local information on soils; weather; inputs and markets; biotechnology; genetic engineering; genome editing; marker-assisted breeding and CRISPR-CAS for improved crop varieties; biofertilisers and biopesticides; rapid diagnostic kits to detect pests, diseases; nutrient deficiencies and GM crops; nanotechnologies to enhance fertiliser-use-efficiency; water-use efficiency and pesticide-use-efficiency; micro-irrigation; irrigation water ATM technologies; laser levelling, structured water; biochar; enhanced carbon sequestration techniques; rapid soil testing kits; precision farming; and regenerative technologies. The technical seminar will highlight the latest technological innovations that could have a game-changing impact on cotton farming in large-scale and small-holder farms across the world.

Climate-smart technologies for cotton production

The UN Climate Change Conference of the Parties (COP26) held in Glasgow, Scotland in November 2021, asked countries to come forward with 'emission reduction targets for 2030' that align with reaching net-zero emissions by 2050 to keep 1.5 degrees or less of global warming within reach. Cotton production practices emit greenhouse gases (GHGs) mainly comprised of carbon dioxide (CO₂), nitrous oxide (N₂O) and methane (CH₄) that cause global warming. GHGs are emitted mainly from the use of agrochemicals, and consumption of fuel and energy used for farm machinery, irrigation and transport. Different crop-production systems emit different levels of GHGs. Research showed that the GHG emissions from cotton farms were 2.37 tonnes of carbon dioxide equivalents (CO₂eq) per tonne of lint produced in Pakistan, 1.60 tonnes in Australia, 1.47 tonnes in Iran, 2.93 tonnes in China, India, Pakistan, Tajikistan and Turkey and 1.7 tonnes of CO₂eq per tonne of lint in the United States of America. Thus, the total global annual emissions from cotton farms may be estimated to be 57.2 million

tonnes of CO₂eq GHGs. Recent studies have shown that several climate-smart technologies have the potential to reduce GHG emissions and enhance carbon sequestration while concomitantly resulting in improvement of sustainable crop productivity. For example, a recent report (Cotton Leads, 2019) highlights the potential of ‘zero-till’ technology-based cotton crop biomass in capturing CO₂ to show that ‘an acre of no-till cotton actually stores 150 kg more of atmospheric carbon than it emits during cotton production, meaning that cotton’s contribution to the carbon equation is net negative’. The technical seminar will discuss the latest developments in climate-smart technologies such as ‘climate-resilient, drought-tolerant cotton varieties’, regenerative agriculture, biochar, nano-technologies for input-use-efficiency, biological alternatives to synthetic chemical fertilisers, biodiversity conservation-based pest management, and government policies to promote climate-smart technologies and reward carbon-farming.

Working Paper 4

Procedure for Composing the Final Statement of the 80th Plenary Meeting

Recommendation from the Secretariat of the International Cotton Advisory Committee

The ICAC secretariat proposes the following process for composing the Final Statement of the 80th Plenary Meeting:

1. A week after the 80th Plenary Meeting concludes, the ICAC secretariat will distribute a first draft of the 80th Plenary meeting Statement via email to the Official delegations in the five official languages of the organization.
2. The Heads of Delegations will have a week to send their requested edits via email to the Director of Communications of the ICAC (mike@icac.org).
3. A revised version of the Statement will be distributed to all listed in the Official

delegations

4. If there isn’t any major changes, the Statement will be deemed final by the Chair who presided the 2022 Steering Committee.

Procedure for Composing the Final Statement

The ICAC Secretariat has revised the process for drafting the Statement for the 80th Plenary Meeting. Having dozens of Delegates trying to read and comment on the document presents a variety of challenges, so the ICAC Secretariat will draft the first version of the Final Statement — in Arabic, English, French, Russian and Spanish — and send it to all Delegates by 9 December 2022. Delegates will then have seven days to review the document and submit their comments and corrections (by 16 December 2022). When the Secretariat receives those comments, a revised version of the Final Statement will be distributed for approval by 19 December 2022, at which time the final version will be resent to all Delegates, and barring any further issues, the official Final Statement will be posted on 23 December.

Fourth Open Session

Rethinking Fashion and Textiles for 2030

09:10 – 11:00 am (GMT-5); Australia (Perth, AW): 10:10 am – 00:00 am; Europe: 14:10 – 16:00 (GMT),
Thursday 1 December 2022

Chairman/ Moderator: Mr Kanwar Usman, Head of Textiles, ICAC

The Chair of the session, Mr Kanwar Usman, highlighted that the ICAC Executive Director, Mr Kai Hughes, in his opening remarks had said that 2021 was a remarkable year for textiles. For the very first time in history, global textile exports crossed \$900 billion. Realising the potential of textiles for the member governments, he had introduced textiles as a full-time subject and hired first-ever head of textiles at International Cotton Advisory Committee (ICAC), Mr Kanwar Usman. Mr Hughes said that this is the first dedicated session on textiles and next year it was planned to hold parallel textiles Plenary sessions along with textile exhibitions and a fashion show.

The Chair, Mr Kanwar Usman, welcomed the audience and introduced the first speaker of the session, Mr Suresh Kotak who has been

serving the cotton and textiles value chain for 65 years and the title of his presentation was, ‘Versatile Cotton Fibre, a Composite Economics’.

Mr Kotak highlighted the importance of cotton and noted that cotton has a complete upstream and downstream value chain. Moreover, cotton has unlimited environmental advantages and while there are some critiques mentioning the downside of cotton due to use of pesticides and fertilisers, cotton sector has been successfully addressing all these issues. Moreover, manmade fibres have a greater negative impact. He also pointed out that cotton is biodegradable and explained the circularity associated with the cotton.

The Chair then introduced the second speaker of the session, Mr Ilkhom Khaydarov, Chairman of Uzbekistan Association of Textile and Garment Industry, whose presentation was entitled, ‘Uzbekistan’s Textile Industry Strategy for 2030’.

Mr Khaydarov said that Uzbekistan has a strong history in cotton and textiles dating

back to the early 19th century and informed that the country’s first cotton ginning factory was functional in 1922. Mr Khaydarov then mentioned a few of the important milestones achieved from 2017-22, including becoming an exporter of finished products, achieving the status of GSP+ from the European Union, the lifting of cotton restrictions and the textile exports increase to \$3 billion.

The Chair thanked Mr Ilkhom Khaydarov and introduced third speaker of the session, Ms Natalia Isaeva, Executive Director of Cotton Way. The topic of her presentation was, ‘How to Transform Industrial Laundries into a Sustainable Business Model’.

Ms Isaeva said that as a large-scale business, investments have had an impact on overall sustainability by reducing the consumption of water by half, energy by 90%, CO₂ emissions by 88% and temperatures by an average of 25 degrees, thus providing a quality product and service and tremendous savings.

The Chair then introduced the fourth speaker, Dr Tanveer Hussain, a Professor of Textile

Engineering and Rector at National Textile University Faisalabad, Pakistan. The topic of his presentation was, ‘Sustainable Development Goals and Textile Circular Economy’.

Dr Tanveer said we need to take care of people, planet and profits. He noted that there are 17 UN Sustainable Development Goals and 159 targets. He discussed all 17 SDGs and their relationship to the textiles value chain. Furthermore, Dr Hussain explained the options to address circularity in textiles value chain, adding that we can combat sustainability challenges at different stages of value chain, starting right with raw materials by using renewable, biodegradable, recycled and organic materials.

The Chair then introduced the fifth speaker, Dr Lilac Osanjo, a Professor at the University of Nairobi who holds a PhD in Design and an MSc in Entrepreneurship. The topic of her presentation was, ‘Capacity Building for the Growth of African Fashion and Textiles Entrepreneurs’.

Dr Osanjo noted that in order to increase exports and address domestic challenges, the African narrative needs to be changed, redefining African fashion and textile products, re-examining the business processes so profitability can be increased, and undertaking

value addition. Dr Osanjo shared case studies on Kitui County Textile Center (KICOTEC) and on the Kenya Export Promotion and Branding Agency (KEPROBA), a small and medium enterprise program.

The Chair then introduced the next speaker, Dr Olivier Zieschank, a director at the International Textiles Manufacturers Federation (ITMF). He got his PhD in Economics from the University of Freiberg and the topic of his presentation was, ‘Key Sustainability Challenges in Textiles Manufacturing’.

Dr Zieschank noted that sustainability has enormous potential for value creation but is difficult to implement because it requires people, companies and governments to work together. He said that it is important to understand the current recycling trends in order to calculate the future demand of virgin fibres for cotton, polyester and cellulosic fibres. He shared data of Wood McKenzie and mentioned that consumption of all fibres is expected to grow through 2030.

The Chair then introduced the seventh and last speaker of the textiles session, Ms Belinda Edmonds, who has worked in almost all sectors of the African Textile and Apparel Industries over the past 30 years, and in 2018 joined the African Cotton Foundation as its

Managing Director.

Ms Edmonds said that the private sector needs guaranteed protection of its investments; repatriation of forex; investment incentives and ease of doing business; reliable energy at lower prices; development of industrial zones; access to land; and duty free imports of textiles machinery. Foreign investors, she said, are wary of dumped imports and require long-term, duty-free trade concessions.

The Chair then opened the floor for questions. Professor Ramkumar from Texas Tech University pointed out that sustainability has a cost and asked whether buyers are willing to pay that cost. Mr Kotak replied that costs can be offset in number of ways, including by increasing productivity, adopting new technologies and implementing better production practices. Mr Hamma Kwajaffa from Nigeria asked about a solution for counterfeiters, smugglers and second-hand clothing? Ms Edmonds said the issue of used clothing should be looked by international trade bodies such as ICAC and WTO. Further, on the subject of counterfeiting, robust legislation has already been passed across world and it depends on individual countries to implement the laws to protect their own goods. The Chair thanked the speakers, delegates and the audience and ended the session.

World Café

The Evolving Global Textile Supply Chain

11:10 – 12:10 pm (GMT-5); Australia (Perth, AW): 00:00 am – 01:00 am (Fri December 2nd); Europe: 16:00 – 17:00 (GMT), Thursday 1 December 2022

Chair/Moderator: Mike McCue, ICAC Communications Director.\

The meeting started at 11:47 am EST and was chaired by Mr Mike McCue, ICAC Communications Director.

Mr McCue explained that the World Café was created to encourage interaction between audience members and change the formula in which speakers talk and the audience listens. He added that there were five discussions held on the theme, ‘The Evolving Global Textile Supply Chain’, in different languages and regions to ensure diversity.

In the first video, from the discussion in Brazil, the speaker stated that SMEs are at increasing risk due to their lack of size, and many of the new technologies that will be implemented will be a challenge for them financially. He added that audit fatigue is a real problem and some farmers who belong to an organisation such as BCI are required to go through an audit twice. So, Brazil’s ABRAPA have worked with BCI to align their requirements so farmers only need to be audited once.

The leader from the discussion held in the USA pointed out that greenwashing was a major problem, misleading and confusing consumers as companies take steps to ensure their business activities don’t negatively affect their reputations. The speakers also warned that if certain technologies, such as

traceability, become too expensive, SMEs will be the first to abandon them.

Feedback from the discussion in Argentina focussed on the challenges that such a long and complex supply chain put on smaller companies, who might not have the resources to acquire all of the technology and training they need to compete with bigger firms. ‘Simplification’ was a common theme, especially in the primary production phases, where the need to track seeds, origins and more are a significant challenge.

During the discussion in Pakistan, speakers highlighted that a human connection must not be lost as we search for technological solutions, and that the most efficient way to improve sustainability across the value chain would be through a partnership between buyers and suppliers. They added that the in-

dustry needs long-term buying commitments so manufacturers can invest in new green technologies and, importantly, that buyers should share the cost.

India, focussing on the question about what the ICAC could do better to serve the textile industry, cited the need for the organisation

to produce more specialised reports, such as on fibre quality and overall productivity, so countries can benchmark and improve themselves. Reports and publications focusing on production have been crucial to improving cultivation practices throughout the ICAC's history and now that same attention

should be put on textiles.

With time for the session already having been exceeded, the Chair thanked all the delegates for their participation and ended the meeting at 12:49 pm.

Closing Session

12:10 – 12:20 pm (GMT-5); Australia (Perth, AW): 01:00 am – 01:10 am (Fri December 2nd); Europe: 17:00 – 17:10 (GMT), Thursday 1 December 2022

Chair Mr Patrick Packnett, USA, Chairman of the Standing Committee

The Executive Director, Mr Kai Hughes, thanked all the delegates for their participation in the 80th Plenary Meeting and thanked the speakers for their very interesting presentations and for the number of good recommendations and takeaways. He also thanked the interpreters who had to work through technical difficulties but performed well under these challenges. ICAC Executive Director

thanked all of the ICAC staff for putting together an excellent programme and thanked all the participants for their participation and contributions towards making the Plenary Meeting a success.

The Chair, Mr Patrick Packnett, thanked the delegates, expert speakers and participants for joining ICAC in the 80th Virtual Plenary Meeting. He observed that the plenary session addressed some of the most crucial issues facing the cotton industry and that all of the presentations had been informative and enlightening. The Chairman commended the ICAC Secretariat for its hard work in planning, organising and coordinating a successful

event that had met the expectations of the cotton industry. As the outgoing Chair, he bid farewell to the participants and looked forward to meeting many of the participants next year when face-to-face meetings would resume.

The incoming Standing Committee Chair, HE Aly Touré, also congratulated the Secretariat for the excellent organisation of the meeting and congratulated the speakers and members of the panel for their insights, and then thanked the outgoing Chair for his service to the committee.

The Chair closed the session at 12:52 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 2022
4. World Cotton Statistics – December 2022
5. World Textile Demand – December 2022
6. World Cotton Trade – December 2022
7. Cotton Data Book – December 2022
8. THE ICAC RECORDER - September 2022
9. Production and Trade Subsidies Affecting the Cotton Industry – Edition 2022
10. Directory

WORKING PAPERS

- I. Election of Standing Committee Officers
- II. Establishment of International Textiles Research Council (ITRC)
- III. Proposed Topics for the 2023 Technical Seminar
- IV. Procedure for Composing the Final Statement of the Plenary Meeting

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