



# PROCEEDINGS

## of the 68<sup>th</sup> Plenary Meeting



### *The Role of Cotton in Economic Development and Ensuring Food Security During a Period of Global Economic Crisis*

**September 2009**



Discover  
natural  
fibres  
2 0 0 9

INTERNATIONAL COTTON ADVISORY COMMITTEE

# **PROCEEDINGS OF THE 68th PLENARY MEETING**

**“The Role of Cotton in Economic Development  
and Ensuring Food Security During a Period  
of Global Economic Crisis”**



ICAC  
Washington DC USA

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# FOREWORD

At the invitation of the Government of the Republic of South Africa, the 68th Plenary Meeting of the International Cotton Advisory Committee was held in Cape Town, from 7-11 September 2009.

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

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

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

## MEMBER GOVERNMENTS

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

India  
Iran  
Israel  
Italy  
Kazakhstan  
Kenya  
Korea, Rep. of  
Mali  
Netherlands, The  
Nigeria  
Pakistan  
Poland  
Russia

South Africa  
Spain  
Sudan  
Switzerland  
Syria  
Tanzania  
Togo  
Turkey  
Uganda  
United States of America  
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Zambia  
Zimbabwe

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# STATEMENT OF THE 68th PLENARY MEETING

## “The Role of Cotton in Economic Development and Ensuring Food Security During a Period of Global Economic Crisis”

The International Cotton Advisory Committee (ICAC) met in Cape Town, South Africa during September 7-11, 2009 for its 68th Plenary Meeting since the establishment of the Committee 70 years ago in 1939. Three hundred sixty-three people attended the meeting, including representatives from 39 governments and 10 international organizations.

**1. The Committee Celebrated 2009 as the International Year of Natural Fibres (IYNF).** The IYNF was declared by the United Nations General Assembly recognizing the contributions of natural fiber industries to the economies of almost all countries, the role of natural fibers in supporting the incomes of hundreds of millions of people, and the benefits of natural fibers to consumers and the environment. The ICAC thanked the Food and Agriculture Organization of the United Nations (FAO) for coordinating the International Year of Natural Fibres. The cotton industry and other natural fiber industries such as coconut, flax, jute, silk, sisal, and wool encourage consumers of the world to “Discover Natural Fibres.”

**2. Modest Increase in Cotton Consumption Forecast:** The Committee received a report from the Secretariat that world cotton consumption fell 12% in the season ended July 31, 2009, the largest year-to-year percentage decline since at least the 1920s. The decline was considered a direct result of the global financial crisis. However, it was noted that the Secretariat expects world cotton use to rise modestly during the current season, assuming a gradual improvement in world economic growth. The Secretariat reported that cotton prices were extraordinarily volatile during the previous season and that the average level of prices had fallen. Assuming more normal economic conditions, price volatility may moderate during the current cotton season, but the Secretariat forecasts that the average level of world cotton prices is not likely to increase significantly.

**3.** The Committee noted that the cotton industry is becoming increasingly resource-constrained. The Committee encourages research and the adoption of new practices that promote productivity.

**4. Cotton Production Enhances Food Security:** Farmer representatives informed the Committee that food security begins with income security. The Committee noted that cash income earned from cotton production allows farmer households, especially those in arid and semi-arid areas where food crops are difficult to produce, to pay for food, health care, school fees and other necessities that would not otherwise be available. It was noted that cotton contributes to food security by providing the means to finance inputs and by enhancing soil fertility and retarding the development of pests and diseases in properly-managed crop rotation systems involving cotton and other crops. It was noted that in order for cotton to perform its role as a catalyst for economic development and contribute to food security, farmers must have access to quality inputs, credit, appropriate technologies and assured markets. The Committee instructed the Secretariat to better identify or define the contribution of cotton to food security.

**5. Facilitating Smallholder Cotton Production:** The Committee was informed that disruptions in the supply of inputs, low levels of technology adoption, and weak marketing systems result in lower returns to growers, which together with delayed payments are the major impediments to smallholder cotton production. Recalling the results of discussions during the 67th Plenary Meeting in 2008 in Ouagadougou, the Committee agreed that smallholder cotton production is dependent on the quality of training received by extension agents and farmers, and that in most cases, Farmer Field Schools combined with demonstration plots, are the most effective form of communication with smallholders. The ICAC recommended that agricultural research and extension should receive increases in public sector support. Some Members of the ICAC voiced support for the creation of an international research center for cotton, and the Standing Committee was directed to give this proposal further consideration. Recognizing the important social and economic development roles played by cotton companies in Africa, and as part of an overall strategy of support to smallholders, some countries suggested that governments give consideration to covering the deficits of cotton companies.

**6. Cotton By-Products and Value Addition:** The Committee was informed that cottonseed and stalks, by-products of cotton production, had traditionally received limited attention because of low values relative to lint. However, with the increase in prices of oilseeds since 2006, by-products now deserve greater attention. The Committee reviewed information about a wide range of uses of cottonseed and stalks for vegetable oil, vegetable oil spreads, animal feed, soap, paper, binder in bricks, and other uses. New research is expected to facilitate an increased use of cottonseed for human consumption, further expanding the range of uses and value of cottonseed. The Committee thanked the Common Fund for Commodities (CFC) and its Managing Director, H.E. Ambassador Ali Mchumo, for supporting projects to facilitate increased commercial use of cotton stalks in the production of building material. A recent project funded by the CFC developed high quality particleboards from cotton stalks, demonstrating that the technology is appropriate for commercial adoption in some countries where stalks do not have an appropriate alternative use.

**7. Support for a Conclusion of the Doha Round:** The Committee reaffirmed the urgent necessity for an ambitious and balanced conclusion to the Doha Round with development as its centerpiece. It welcomed the recent impetus to the Doha Round resulting from the initiative by the Government of India to convene a WTO Mini-Ministerial. The Committee urged WTO Members, particularly the Senior Officials and the Chief Negotiators, as they re-start negotiations in Geneva on 14 September, to establish "a process of engagement" and an "overall agenda of action", as agreed at New Delhi, so as to conclude the Doha Round in 2010. The Committee encouraged all WTO Members to contribute to bringing the Doha Round to a conclusion, through negotiations, flexibility and compromise. The Committee acknowledged that a conclusion of the Doha Round would facilitate recovery from the global economic crisis and would enable growth inter-alia in demand for cotton and cotton products. It was noted that a successful conclusion of the Doha Round would foster broader international cooperation in other pressing areas of the global agenda. The Committee also urged all countries to resist protectionist measures in response to the current economic crisis.

**7.1** The Secretariat reported that more than 80% of world cotton production had received support from Governments in 2008/09. The aggregate value of support more than doubled to approximately US\$6 billion. The Secretariat in its report to the Committee noted that these subsidies distort the world cotton economy, and many countries urged immediate elimination.

**7.2** The Committee welcomed contributions by the EC and the US and other traditional donors on the development assistance aspects of cotton. The valuable contributions by Brazil, China (Mainland) and India on the platform of South-South Cooperation were acknowledged. They re-committed themselves to continue with the implementation of their contributions as reflected in the Evolving Table on Cotton compiled by the WTO Secretariat. The Committee urged full respect and coherence in the 2-track treatment. The ICAC Secretariat was encouraged to continue its collaboration with the WTO Secretariat.

**7.3** The Committee reaffirmed its support for the position that cotton was a test of the development dimension of the Doha Round. There will be no conclusion to the Doha Round without a resolution of the cotton question, and a satisfactory conclusion of the cotton dossier depends on the conclusion of the Doha Round.

**8. Appreciation of South African Hospitality:** The Committee thanked the people, the Government, and the cotton industry of South Africa for their hospitality, generosity and excellent organization in serving as host of the 68th Plenary Meeting. South Africa was the first African country to adopt biotech cotton, and while South Africa is a small cotton producing and consuming country, it is a country with a large heart and great concern for the welfare of smallholders.

**9. Future Plenary Meetings:** The Committee was disappointed to learn that the Government of Uzbekistan will not be able to host the 69th Plenary Meeting in 2010 because of overlapping international meetings in Tashkent, but an offer by Uzbekistan to host the ICAC at another time was welcomed. The Secretariat informed the Committee that other countries have expressed an interest in hosting the 69th Plenary Meeting. The Committee noted with appreciation the invitation from the Government of Argentina to host the 70th Plenary Meeting in 2011.

## **MEMBER GOVERNMENTS**

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



# SUPPLY AND DISTRIBUTION OF COTTON

September 9, 2009

Years Beginning August 1

|                                   | 2005                | 2006          | 2007          | 2008<br>Est.  | 2009<br>Proj. | 2010<br>Proj. |
|-----------------------------------|---------------------|---------------|---------------|---------------|---------------|---------------|
|                                   | Million Metric Tons |               |               |               |               |               |
| <b>BEGINNING STOCKS</b>           |                     |               |               |               |               |               |
| <b>WORLD TOTAL</b>                | <b>11.620</b>       | <b>12.306</b> | <b>12.707</b> | <b>12.132</b> | <b>12.37</b>  | <b>12.03</b>  |
| CHINA (MAINLAND)                  | 2.622               | 3.991         | 3.653         | 3.321         | 3.85          | 3.69          |
| USA                               | 1.196               | 1.321         | 2.064         | 2.187         | 1.32          | 1.14          |
| <b>PRODUCTION</b>                 |                     |               |               |               |               |               |
| <b>WORLD TOTAL</b>                | <b>25.639</b>       | <b>26.718</b> | <b>26.035</b> | <b>23.368</b> | <b>23.25</b>  | <b>22.98</b>  |
| CHINA (MAINLAND)                  | 6.616               | 7.975         | 8.071         | 8.025         | 7.47          | 7.47          |
| INDIA                             | 4.097               | 4.760         | 5.219         | 4.930         | 5.34          | 5.18          |
| USA                               | 5.201               | 4.700         | 4.182         | 2.790         | 2.88          | 2.85          |
| PAKISTAN                          | 2.194               | 2.147         | 1.894         | 1.960         | 2.08          | 2.06          |
| BRAZIL                            | 1.038               | 1.524         | 1.602         | 1.193         | 1.13          | 1.14          |
| UZBEKISTAN                        | 1.210               | 1.171         | 1.206         | 1.000         | 1.03          | 1.02          |
| OTHERS                            | 5.283               | 4.441         | 3.862         | 3.470         | 3.33          | 3.27          |
| <b>CONSUMPTION</b>                |                     |               |               |               |               |               |
| <b>WORLD TOTAL</b>                | <b>24.951</b>       | <b>26.360</b> | <b>26.385</b> | <b>23.093</b> | <b>23.59</b>  | <b>23.93</b>  |
| CHINA (MAINLAND)                  | 9.439               | 10.600        | 10.900        | 9.000         | 9.27          | 9.46          |
| INDIA                             | 3.655               | 3.908         | 4.050         | 3.827         | 4.04          | 4.20          |
| PAKISTAN                          | 2.532               | 2.633         | 2.637         | 2.452         | 2.55          | 2.63          |
| EAST ASIA & AUSTRALIA             | 1.884               | 1.869         | 1.843         | 1.673         | 1.68          | 1.67          |
| EU, C. EUR. & TURKEY              | 2.112               | 2.084         | 1.751         | 1.431         | 1.37          | 1.32          |
| BRAZIL                            | 0.973               | 0.992         | 1.007         | 0.937         | 0.94          | 0.94          |
| USA                               | 1.278               | 1.074         | 0.999         | 0.784         | 0.76          | 0.74          |
| CIS                               | 0.633               | 0.682         | 0.664         | 0.596         | 0.59          | 0.58          |
| OTHERS                            | 2.444               | 2.518         | 2.533         | 2.393         | 2.39          | 2.40          |
| <b>EXPORTS</b>                    |                     |               |               |               |               |               |
| <b>WORLD TOTAL</b>                | <b>9.735</b>        | <b>8.104</b>  | <b>8.358</b>  | <b>6.496</b>  | <b>6.80</b>   | <b>7.04</b>   |
| USA                               | 3.821               | 2.833         | 2.973         | 2.874         | 2.30          | 2.25          |
| BRAZIL                            | 0.429               | 0.283         | 0.486         | 0.600         | 0.30          | 0.27          |
| UZBEKISTAN                        | 1.020               | 0.980         | 0.887         | 0.560         | 0.84          | 0.88          |
| CFA ZONE                          | 1.010               | 0.924         | 0.589         | 0.470         | 0.47          | 0.54          |
| INDIA                             | 0.751               | 0.960         | 1.530         | 0.463         | 1.35          | 1.43          |
| AUSTRALIA                         | 0.628               | 0.465         | 0.265         | 0.260         | 0.32          | 0.43          |
| <b>IMPORTS</b>                    |                     |               |               |               |               |               |
| <b>WORLD TOTAL</b>                | <b>9.610</b>        | <b>8.142</b>  | <b>8.316</b>  | <b>6.460</b>  | <b>6.80</b>   | <b>7.04</b>   |
| EAST ASIA & AUSTRALIA             | 1.774               | 1.899         | 1.860         | 1.646         | 1.72          | 1.66          |
| CHINA (MAINLAND)                  | 4.200               | 2.306         | 2.511         | 1.523         | 1.66          | 1.95          |
| EU, C. EUR. & TURKEY              | 1.275               | 1.344         | 1.085         | 0.851         | 0.95          | 0.90          |
| PAKISTAN                          | 0.352               | 0.502         | 0.851         | 0.475         | 0.52          | 0.62          |
| CIS                               | 0.333               | 0.322         | 0.271         | 0.238         | 0.23          | 0.00          |
| <b>TRADE IMBALANCE 1/</b>         | <b>-0.125</b>       | <b>0.038</b>  | <b>-0.043</b> | <b>-0.036</b> | <b>0.00</b>   | <b>0.00</b>   |
| <b>STOCKS ADJUSTMENT 2/</b>       | <b>0.123</b>        | <b>0.005</b>  | <b>-0.183</b> | <b>0.000</b>  | <b>0.00</b>   | <b>0.00</b>   |
| <b>ENDING STOCKS</b>              |                     |               |               |               |               |               |
| <b>WORLD TOTAL</b>                | <b>12.306</b>       | <b>12.707</b> | <b>12.132</b> | <b>12.371</b> | <b>12.03</b>  | <b>11.08</b>  |
| CHINA (MAINLAND)                  | 3.991               | 3.653         | 3.321         | 3.850         | 3.69          | 3.65          |
| USA                               | 1.321               | 2.064         | 2.187         | 1.319         | 1.14          | 0.99          |
| <b>ENDING STOCKS/MILL USE (%)</b> |                     |               |               |               |               |               |
| <b>WORLD-LESS-CHINA (M) 3/</b>    | <b>54</b>           | <b>57</b>     | <b>57</b>     | <b>60</b>     | <b>58</b>     | <b>51</b>     |
| <b>CHINA (MAINLAND) 4/</b>        | <b>42</b>           | <b>34</b>     | <b>30</b>     | <b>43</b>     | <b>40</b>     | <b>39</b>     |
| <b>COTLOOK A INDEX 5/</b>         | <b>56.15</b>        | <b>59.15</b>  | <b>72.90</b>  | <b>61.20</b>  | <b>63*</b>    |               |

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.

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

3/ World-less-China (Mainland) ending stocks divided by World-less-China (Mainland)'s mill use, multiplied by 100.

4/ China (Mainland)'s ending stocks divided by China (Mainland)'s mill use, multiplied by 100.

5/ U.S. cents per pound.

\* The price projection for 2009/10 is based on the ending stocks/consumption ratio in the world-less-China (Mainland) in 2007/08 (estimate), in 2008/09 (estimate) and in 2009/10 (projection), and on the ratio of Chinese net imports to world imports in 2008/09 (estimate) and 2009/10 (projection).

95% confidence interval: 55 to 73 cents per pound.

# STATEMENT OF THE 68th PLENARY MEETING

## “The Role of Cotton in Economic Development and Ensuring Food Security During a Period of Global Economic Crisis”

### Committee on Cotton Production Research

The International Cotton Advisory Committee met in Cape Town, South Africa during September 7-11, 2009 for its 68th Plenary Meeting. Three hundred sixty-three people attended the meeting, including representative from 39 governments and 10 international organizations.

1. The Committee on Cotton Production Research of the ICAC organized a Technical Seminar on Biosafety Regulations, Implementation and Consumer Acceptance. It is estimated that more than half of world cotton area was planted to biotech varieties in 2008/09. No new trait has been commercialized since the adoption of herbicide tolerant and insect resistant cotton almost 15 years ago. However, the benefits of existing traits are spreading to more countries and growers.

2. Biosafety regulations must be in place to introduce, test and commercialize biotech cotton crops. The Committee was informed that some countries have developed biosafety regulations, acts and laws while others have embedded biotechnology regulations in existing laws. Nine countries (Algeria, Burkina Faso, Egypt, Kenya, Mauritius, Malawi, South Africa, Tunisia and Zimbabwe) in Africa have well developed national biosafety frameworks, while many other countries are at various stages of formulating protocols/laws to adopt biotech cotton.

3. Cottonseed oil finds its way into the feed chain in many forms, apart from industrial uses such as glycerin, soap and fatty acids. Over 10 million tons of cottonseed meal are produced every year, and almost  $\frac{3}{4}$  comes from biotech seed. There is no discrimination against biotech cottonseed oil or meal at any stage of the marketing chain.

4. Research in Argentina showed that biotech seed fed to livestock does not affect either production of milk or its chemical composition. Buyers of cottonseed do not differentiate between biotech and conventional seed.

5. Laws in Australia, European Union and New Zealand require that food containing over 1% of material from biotech produce must bear a label with that information. Japan has a limit of 5%, while no labeling is required in most other countries.

6. All biotech crops are regulated, including insect resistant and herbicide tolerant cotton. Countries that have commercialized crops must have systems to conduct science-based, case-by-case assessments of the potential risks to humans or the environment and the long term sustainability of the technology. As biotech cotton advances beyond agronomic traits, the current regulatory systems will be challenged to meet the new demands.

7. In spite of economic, social and environmental benefits of biotechnology applications, skepticism about biotech products has not disappeared. Continued concerns about food safety and weak regulatory capacity are some of the reasons for slow adoption of biotech crops. Socio-economic considerations also continue to limit the spread of biotechnology.

8. Biotechnology is expected to play a dominant role in the development of new varieties to control insects and use inputs efficiently. Researchers believe that molecular marker assisted breeding should be propagated to deal with biotic and abiotic stresses efficiently. Much work is occurring in biotechnology applications in cotton. New traits will be introduced that will contribute to improving the sustainability of cotton production.

9. The Committee on Cotton Production Research received a visionary paper from the “ICAC Cotton Researcher of the Year”, Dr. Keshav Kranthi of India. He emphasized the need for molecular marker assisted breeding, contamination free cotton, testing all cotton on high volume instruments, reducing the cost of cotton production and the establishment of an international cotton research institute.

10. The Committee on Cotton Production Research of the ICAC decided to hold the 2010 Technical Seminar on the topic “How to lower the cost of cotton production”. The Committee also recommended that a Breakout Session on Cost Reduction in the Value Chain be conducted.

## **Заявление 68-го пленарного заседания**

### **«Роль хлопка в экономическом развитии и обеспечении безопасности продовольствия в период глобального экономического кризиса»**

С 7 по 11 сентября 2009 г. в г. Кейптауне, Южная Африка, состоялось 68-е пленарное заседание учреждённого 70 лет тому назад в 1939 году Международного консультативного комитета по хлопку. В заседании приняли участие 363 человека, в т. ч. представители 39 правительств и 10 международных организаций.

**1. Комитет отпраздновал 2009 год как международный год натуральных волокон,** который был объявлен Генеральной Ассамблеей ООН в качестве признания вклада натуральных волокон в экономику почти всех стран, роли натуральных волокон в деле поддержки доходов сотен миллионов людей, а также преимуществ натуральных волокон, связанных с потребителями и окружающей средой. МККХ поблагодарил Продовольственную и сельскохозяйственную организацию ООН (ФАО) за координацию проведения международного года натуральных волокон. Хлопковый сектор и такие другие индустрии-побратимы натуральных волокон, как кокус, лён, джут, шёлк, сизаль, шерсть и другие, поощряют потребителей всего мира «открыть для себя натуральные волокна».

**2. Скромный подъём прогнозов потребления.** Комитет заслушал доклад Секретариата о том, что хлопкопотребление в сезоне, который закончился 31 июля 2009 г., снизилось на 12%, причём такое уменьшение является крупнейшим ежегодным процентным спадом по крайней мере с 1920-х годов, когда впервые начали собирать статистические данные о мировой хлопковой промышленности. Однако отмечалось, что Секретариат ожидает скромного повышения мирового использования хлопка в течение нынешнего сезона, если будет наблюдаться постепенное улучшение мирового экономического роста. Секретариат доложил, что во время предыдущего сезона цены на хлопок были чрезвычайно изменчивыми и что произошло падение среднего уровня цен. В предположении более нормальных экономических условий может случиться так, что в течение текущего хлопкового сезона непостоянство цен станет более умеренным, но Секретариат прогнозирует, что вряд ли средние мировые цены на хлопок существенно повысятся.

**3. Комитет отметил,** что назревает нехватка ресурсов, особенно в связи с ростом мирового народонаселения. Комитет поощряет научные исследования и принятие новых методов содействия росту производительности.

**4. Хлопкопроизводство способствует повышению безопасности продовольствия.** Представители фермеров сообщили Комитету, что продовольственная безопасность начинается с безопасности доходов. Комитет отметил, что денежные доходы, получаемые от хлопкопроизводства, позволяют фермерским хозяйствам, особенно на сухих и полусухих площадях, где трудно производить пищевые культуры, платить за продовольствие, здравоохранение, школьное обучение и другие предметы первой необходимости, которых в противном случае не было бы в наличии. Было отмечено, что хлопок способствует продовольственной безопасности путём предоставления способов финансирования сельхозтехники и химикатов, повышения плодородия почвы, замедления развития вредителей и болезней в хорошо управляемых системах севооборота с участием хлопка и других культур. Было отмечено, что в целях выполнения хлопком своей роли как катализатора экономического развития и обеспечения продовольственной безопасности фермеры должны иметь доступ к качественной сельхозтехнике,

кредитам, соответствующим технологиям и обеспеченным рынкам. Комитет поручил Секретариату лучшим образом оценить или определить вклад хлопка в продовольственную безопасность.

**5. Содействие хлопкопроизводству мелкими фермерскими хозяйствами.** Комитету сообщили, что перерывы в поставке сельхозтехники и химикатов, низкий уровень принятия технологии и слабые системы маркетинга приводят к снижению денежных возвратов хлопкоробам и запаздыванию платежей фермерам, что является основным препятствием на пути хлопкопроизводства мелкими фермерскими хозяйствами. Вспоминая результаты дискуссий на 67-м пленарном заседании в 2008 году в г.Уагадугу, Комитет согласился с тем, что хлопкопроизводство мелкими фермерскими хозяйствами зависит от качества обучения, полученного с помощью агентов по распространению передовых знаний и фермеров, а также что в большинстве случаев наиболее эффективной формой связи с мелкими хозяйствами являются фермерские полевые школы совместно с демонстрационными участками. МККХ рекомендовал, чтобы работа в области научных исследований и распространения знаний относительно сельского хозяйства получала более существенную помощь общественности. Некоторые страны-члены МККХ поддержали идею создания международного центра по исследованию хлопкового хозяйства, причём Постоянному Комитету поручили в дальнейшем рассмотреть данное предложение. Осознавая важность роли хлопковых компаний Африки в социально-экономическом развитии как части целостной стратегии поддержки мелких фермерских хозяйств, некоторые страны предложили, чтобы правительства рассмотрели возможность покрытия дефицитов хлопковых компаний.

**6. Побочные хлопковые продукты и добавочная стоимость.** Комитету сообщили, что на такие побочные продукты хлопкопроизводства, как хлопок-сырец и стебли, обычно обращали мало внимания из-за их низкой ценности по сравнению с хлопковоолокном. Однако повышение цен на масличные семена с 2006 г. привело к тому, что в настоящее время побочные продукты заслуживают большего внимания. Комитет проанализировал информацию о широком диапазоне использования хлопка-сырца и стеблей, применяемых в растительном масле, намазках из растительного масла, пищи для животных, мыле, бумаге, связующих компонентах кирпичей и других сферах применения. Ожидается, что новые исследования приведут к расширению масштабов использования хлопка-сырца для потребления человеком, дальнейшему увеличению использования и стоимости хлопка-сырца. Комитет поблагодарил Общий фонд для сырьевых товаров (ОФСТ) и его директора-распорядителя посла Али Мчумо за поддержку проектов, направленных на содействие увеличению коммерческого использования хлопковых стеблей при производстве строительных материалов. Финансируемый ОФСТ недавно выполненный проект по изготовлению высококачественных древесно-стружечных плит из хлопковых стеблей показал, что данная технология приемлема для коммерческого использования в некоторых странах, где стебли не имеют соответствующих альтернативных вариантов.

**7. Необходимость скорейшего завершения Дохийского раунда переговоров.**

Комитет подтвердил насущную необходимость амбициозного и сбалансированного завершения Дохийского раунда переговоров, с особым упором на аспекты развития. Комитет приветствовал недавнее продвижение Дохийского раунда переговоров в соответствии с инициативой правительства Индии, направленной на проведение мини-министерской встречи в рамках ВТО. Комитет призвал членов ВТО, особенно старших должностных лиц и главных переговорщиков, ещё раз провести переговоры в Женеве 14 сентября с целью установления «процесса совместных действий» и «общей повестки дня действий», как было согласовано в г.Дели, с тем чтобы завершить Дохийский раунд переговоров в 2010 г. Комитет призвал всех стран-членов ВТО способствовать завершению Дохийского раунда переговоров путём консультаций, проявления гибкости и достижения компромисса. Комитет признал, что завершение Дохийского раунда переговоров ускорит процесс выхода из глобального экономического кризиса и будет

способствовать росту спроса на хлопок и хлопковую продукцию. Было отмечено, что успешное завершение Дохийского раунда приведёт к расширению международного сотрудничества в других важных областях глобального взаимодействия. Комитет также призвал все страны оказывать сопротивление протекционистским мерам в ответ на нынешний экономический кризис.

**7.1** Секретариат доложил, что более 80% мирового хлопкопроизводства в 2008-09 г. получили поддержку своих правительств. Совокупная стоимость поддержки более чем удвоилась и составила примерно 6 млрд. долларов США. В своём отчёте Комитету Секретариат отметил, что эти субсидии искажают мировое хлопковое хозяйство, причём многие страны призвали к немедленному устранению субсидий.

**7.2** Комитет приветствовал вклад ЕС, США и других традиционных доноров в помощь развитию хлопкового хозяйства. Был отмечен ценный вклад Бразилии, КНР и Индии в рамках сотрудничества Юг-Юг. Эти страны подтвердили свои обязательства продолжать внедрение таких программ, что получило отражение в разрабатываемой Секретариатом ВТО таблице по хлопку. Комитет призвал полностью соблюдать и придерживаться политики двух направлений. Секретариат МККХ попросили продолжать сотрудничество с Секретариатом ВТО.

**7.3** Комитет подтвердил свою поддержку позиции, относящейся к тому, что хлопок был испытательным полигоном развития Дохийского раунда переговоров. Не будет завершения Дохийского раунда без решения хлопковых вопросов, причём удовлетворительное заключение хлопкового досье зависит от окончания Дохийского раунда переговоров.

**8. Благодарность за гостеприимство Южной Африки.** Комитет поблагодарил народ, правительство и хлопковое хозяйство Южной Африки за их гостеприимство, щедрость и отличную организацию 68-го пленарного заседания. Южная Африка была первой африканской страной, в которой был принят биотех-хлопок. Хотя Южная Африка является небольшой страной-производителем и потребителем, она отличается искренними сердечными порывами и большой озабоченностью о благосостоянии мелких фермерских хозяйств.

**9. Будущие пленарные заседания.** Комитет с разочарованием узнал, что правительство Узбекистана не сможет стать организатором 69-го пленарного заседания в 2010 г. из-за накладок в проведении международных совещаний в г.Ташкенте, но приветствовал предложение Узбекистана провести заседание МККХ в другое время. Генеральный Секретарь обратился с просьбой к странам, заинтересованным в организации 69-го пленарного заседания в 2010 г., связаться с Секретариатом для получения дополнительной информации. Комитет с благодарностью принял приглашение правительства Аргентины провести 70-е пленарное заседание в 2011 г.

#### **Страны-члены Комитета**

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

## **Заявление 68-го пленарного заседания**

### **«Роль хлопка в экономическом развитии и обеспечении безопасности продовольствия в период глобального экономического кризиса»**

#### **Комитет по научным исследованиям в области хлопкопроизводства**

С 7 по 11 сентября 2009 г. в г. Кейптауне, Южная Африка, состоялось 68-е пленарное заседание учреждённого в 1939 году Международного консультативного комитета по хлопку. В заседании приняли участие 363 человек в т. ч. представители 39 правительств и 10 международных организаций.

1. Комитет МККХ по исследованию хлопкопроизводства провёл технический семинар на тему **«Нормы биобезопасности, их реализация и принятие потребителем»**. Считается, что в 2008-09 г. более половины мировых площадей под хлопчатником были засеяны биотех-сортами. С момента принятия толерантного к гербицидам и устойчивого к вредителям хлопка примерно 15 лет тому назад новые свойства не были коммерциализированы. Однако преимущества существующих свойств распространяются на большее количество стран и хлопкоробов.
2. Нормы биобезопасности должны применяться для принятия, испытания и коммерциализации культур биотех-хлопка. Комитету сообщили, что в некоторых странах были разработаны нормы, правила и законы биобезопасности, в то время как другие страны включили биотехнологические нормы в существующие законы. В Африке 9 стран (Алжир, Буркина-Фасо, Египет, Кения, Маврития, Малави, Южная Африка, Тунис и Зимбабве) обладают хорошо развитыми национальными рамками биобезопасности, а другие находятся на различных этапах формирования правил и законов принятия биотех-хлопка.
3. Масло из хлопка-сырца продвигается по продовольственной сети во многих формах, кроме таких продуктов промышленного использования, как глицерин, мыло и жирные кислоты. Ежегодно производят свыше 10 млн. тонн муки хлопка-сырца, причём  $\frac{3}{4}$  получают из биотех-семян. На любом этапе сети сбыта нет противостояний относительно использования семян или муки биотехнологического хлопка-сырца.
4. Проведённая в Аргентине работа показала, что биотех-семена, которыми кормили крупный рогатый скот, не повлияли на удои молока или его химический состав. Покупатели хлопка-сырца не делают различия между биотех-семенами и обычными семенами.
5. По законам Аргентины, ЕС и Новой Зеландии требуется, чтобы на продовольственные продукты, содержащие свыше 1% биотех-материала, был наклеен ярлык с указанной выше информацией. В Японии установлен лимит в 5%, но в большинстве других стран наклейка ярлыков не требуется.
6. Все биотех-культуры регулируются, включая устойчивый к вредителям и толерантный к гербицидам хлопок. Страны, которые осуществили коммерциализацию культур, должны иметь системы проведения научно обоснованных и относящихся к отдельным случаям оценок потенциальных рисков для человека и окружающей среды, а также долгосрочной устойчивости

технологии. По мере продвижения биотех-хлопка за пределы агрономических свойств нынешние системы регулирования будут призваны соответствовать новым требованиям.

7. Несмотря на экономические, социальные и экологические преимущества применения биотехнологии, скептицизм относительно биотех-продукции не исчез. Некоторые причины медленного принятия биотех-культур относятся к непрерывной озабоченности о продовольственной безопасности и слабой нормативной базе. Ограничению распространения биотехнологий также способствуют социально-экономические аспекты.

8. В будущем биотехнология будет играть доминирующую роль в выращивании новых сортов, борьбе с насекомыми-вредителями и эффективном использовании сельхозтехники и химикатов. Учёные считают, что селекционирование с помощью молекулярной метки должно развиваться для эффективной борьбы с биотическими и абиотическими стрессами. Ведётся большая работа по применению биотехнологии в хлопке. Будут представлены новые свойства, способствующие улучшению устойчивости хлопкопроизводства.

9. Комитет по научным исследованиям в области хлопкопроизводства заслушал сообщение «исследователя года в сфере хлопкового хозяйства» д-ра наук Кешава Кранти из Индии, который подчеркнул необходимость селекционирования с помощью молекулярной метки, наличия наименее засорённого хлопка и испытаний всей хлопковой продукции на электронных измерителях качества, снижения себестоимости хлопкопроизводства, а также создания Международного института по исследованиям хлопкового хозяйства.

10. Комитет по научным исследованиям в области хлопкопроизводства решил провести технический семинар в 2010 г. на тему «Как снизить стоимость хлопкопроизводства». Комитет также рекомендует провести отдельную сессию относительно сокращения затрат по всей стоимостной цепи.

- 6-** كل المحاصيل من التكنولوجيا الحيوية منظمة بما في ذلك القطن المقاوم للحشرات و القطن الذي يتحمل مبيدات الأعشاب. و الدول التي طرحت هذه المحاصيل تجاريا يجب أن يكون لديها أنظمة تدعو إلى إجراء تقييمات على أساس علمي و على أساس كل حالة على حدة للمخاطر المحتملة على البشر للاستمرارية في هذه التكنولوجيا. و في الوقت الذي يتقدم فيه قطن التكنولوجيا الحيوية ليتجاوز السلالات الزراعية فإن الإجراءات التنظيمية سوف تواجه تحديا لتلبية الطلبات الجديدة.
- 7-** بالرغم من الفوائد الاقتصادية و الاجتماعية و البيئية لتطبيقات التكنولوجيا الحيوية إلا أن التشاؤم حول منتجات التكنولوجيا الحيوية لم تتبدد. فالقلق بشأن سلامة الأغذية و الطاقات التنظيمية الضعيفة ما هي إلا بعض الأسباب. لتباطؤ تبني محاصيل التكنولوجيا الحيوية. كذلك، تستمر أيضا الاعتبارات الاجتماعية الاقتصادية في الحد من انتشار التكنولوجيا الحيوية.
- 8-** من المتوقع أن تلعب التكنولوجيا الحيوية دورا مهما في تطوير نوعيات جديدة للسيطرة على الحشرات واستخدام المدخلات بكفاءة. و يعتقد الباحثون أن توليد البذور بمساعدة و سمات الشفرة الجزيئية يجب أن يتزايد من أجل التعامل بكفاءة مع الإجهادات الحيوية و غير الحيوية. و هناك الكثير من العمل يجري في تطبيقات التكنولوجيا الحيوية في القطن إذ أن سلالات جديدة سوف تقدم و من شأنها أن تسهم في تحسين ديمومة إنتاج القطن.
- 9-** تلقت اللجنة الخاصة بأبحاث إنتاج القطن ورقة بحث متبصرة من الدكتور كيشاف كرانتي Dr. Keshav Kranthi من الهند، باحث السنة الذي كرّمته اللجنة الاستشارية الدولية في مجال القطن. و لقد أكد في ورقته على الحاجة لتوليد و إكثار البذور بمساعدة و سمات الشفرة الجزيئية و على القطن الخالي من التلوث و إجراء الفحوصات باستخدام أجهزة (HVI) للاختبارات، لتقليل تكاليف إنتاج القطن و تأسيس معهد أبحاث دولي للقطن.
- 10-** قررت اللجنة الخاصة بأبحاث إنتاج القطن التابعة للجنة الاستشارية الدولية للقطن قررت عقد ندوة فنية في العام 2010 تدور حول كيفية تخفيض تكلفة إنتاج القطن. كذلك أوصت اللجنة بأن تُعقد جلسة فرعية تتناول موضوع تخفيض التكلفة في سلسلة مراحل العمليات القطنية.

## اللجنة الاستشارية الدولية للقطن

### البيان الختامي للجلسة العمومية الثامنة والستين

#### اللجنة الخاصة بأبحاث إنتاج القطن

اجتمعت اللجنة الاستشارية الدولية للقطن (ICAC) في كيب تاون، إفريقيا الجنوبية في الفترة بين السابع و الحادي عشر من شهر سبتمبر/أيلول 2009 في جلستها العمومية الثامنة والستين. و حضر الجلسة ثلاثمائة و ثلاثة و ستون شخصا من بينهم ممثلون من تسع و ثلاثين حكومة و عشر منظمات دولية.

1- نظمت اللجنة الخاصة بأبحاث إنتاج القطن التابعة للجنة الاستشارية الدولية للقطن (ICAC) ندوة فنية حول موضوع "نظم السلامة الحيوية و تنفيذها و تقبلها من المستهلكين". و من المقدّر أن أكثر من نصف مساحات الأرض المزروعة بالقطن في الموسم 2009/2008 كانت من نوعيات قطن التكنولوجيا الحيوية. ولم تطرح سلالات جديدة تجاريا منذ تبني القطن الذي يتحمل مبيدات الحشرات و القطن المقاوم للحشرات نفسها منذ خمسة عشر سنة. غير أن فوائد السلالات الموجودة آخذة في الانتشار إلى بلدان أكثر و أعداد أكبر من المزارعين.

2- يجب أن تكون أنظمة السلامة الحيوية نافذة لتقديم محاصيل التكنولوجيا الحيوية و فحصها و من ثمّ طرحها تجاريا. هذا و كانت اللجنة الاستشارية الدولية للقطن قد أبلغت أن بعض الدول طوّرت أنظمة، و سنت قوانين خاصة بالسلامة الحيوية فيما قامت دول أخرى بإدخال نظم التكنولوجيا الحيوية ضمن قوانين سارية المفعول عندها. وهناك تسع دول افريقية (الجزائر، و بوركينا فاسو، و مصر، و كينيا، و الموريشيوس، و الملاوي، و إفريقيا الجنوبية، و تونس، و زمبابوي) قد وضعت الأطر القومية المتعلقة بالسلامة الحيوية بينما وصلت عدّة دول أخرى إلى مراحل مختلفة في عملية تشكيل البروتوكولات أو القوانين الرامية إلى احتضان قطن التكنولوجيا الحيوية.

3- الزيوت المستخرجة من بذور القطن تجد طريقها في سلسلة الأعلاف بأشكال مختلفة عدى عن الاستخدامات الصناعية مثل الغليسارين، و الصابون، و الأحماض الدهنية. و يذكر أن أكثر من عشرة ملايين طن من دقيق بذرة القطن يتم إنتاجها سنويا، منها ثلاثة أرباع الكمية أصلها من بذور التكنولوجيا الحيوية. ولا يوجد هناك أي تمييز ضد زيوت أو دقيق بذور القطن البيوتكنولوجي في أي مرحلة من مراحل التسويق.

4- أظهرت الأبحاث التي تم إنجازها في الأرجنتين أن بذور قطن التكنولوجيا الحيوية الذي قدم علفا إلى المواشي لم تؤثر على إنتاج الحليب و لا على تركيبته الكيميائية. كذلك، لا يميّز الذين يشتركون بذور قطن التكنولوجيا الحيوية التجاري و بين البذور التقليدية.

5- إن القوانين المعمول بها في استراليا و الاتحاد الأوروبي و نيوزيلندا تتطلب أن الأغذية التي تحتوي على أكثر من 1% من المواد المنتجة من التكنولوجيا الحيوية يجب أن تحمل علامة تتضمن تلك المعلومات. وفي اليابان، هناك حدّ يساوي 5% فيما أن وضع الشارة غير مشروط في معظم الدول الأخرى.

## 9- الجلسات العمومية المستقبلية:

لقد خاب أمل اللجنة الاستشارية الدولية للقطن لدى سماعها أن حكومة أوزباكستان لن تكون قادرة على استضافة الجلسة العمومية التاسعة والستين في العام 2010 بسبب تضارب المواعيد مع اجتماعات دولية ستُعقد في طشقند. ولكن اللجنة رحبت بعرض من أوزباكستان لاستضافة اللجنة الاستشارية الدولية للقطن في موعد آخر. وكذلك أعلمت السكرتارية اللجنة أن دولا أخرى أعربت عن الاهتمام في استضافة الجلسة العمومية التاسعة والستين. هذا، وأشارت اللجنة الى أنها قبلت مع التقدير دعوة تلقتها من حكومة الأرجنتين لاستضافة الجلسة العمومية السبعين في العام 2011.

## 10- الحكومات الاعضاء:

الأرجنتين، استراليا، البلجيكي، البرازيل، بوركينا فاسو، كامبيرون، تشاد، الصين (تاوان)، كولومبيا، ساحل العاج، مصر، فنلندا، فرنسا، ألمانيا، الهند، إيران، إسرائيل، إيطاليا، كازاخستان، كينيا، جمهورية كوريا الجنوبية، مالي، هولندا، نيجيريا، باكستان، بولندا، روسيا، إفريقيا الجنوبية، إسبانيا، السودان، سويسرا، سوريا، تانزانيا، توغو، تركيا، يوغندا، الولايات المتحدة الأمريكية، أوزباكستان، زامبيا، زيمبابوي.

كان هناك مشروع تمّ فيه تطوير ألواح عالية الجودة من جزيئات من سيقان نبتة القطن، الأمر الذي يُظهر أن هذه التكنولوجيا تصلح للتبني تجارياً في بعض الدول التي لا يوجد فيها استخدام بديل مناسب لهذه السيقان.

## 7- دعم اكتمال جولة الدوحة

كررت اللجنة تأكيدها على الضرورة الملحة لنهاية متوازنة و طموحة لجولة الدوحة مع وضع مسألة التنمية في صدارة أعمالها. و رحب في قوة الزخم الأخيرة في جولة الدوحة و التي نتجت عن مبادرة الحكومة الهندية لعقد اجتماع وزاري مصغر لمنظمة التجارة الدولية WTO. وحثّت اللجنة أعضاء منظمة التجارة الدولية، خاصة كبار المسؤولين فيها و رؤساء المفاوضين عندما يستأنفوا المفاوضات في جنيف في الرابع عشر من سبتمبر/أيلول، حثّتهم على وضع منهج للانخراط و جدول شامل لأجندة عمل كما اتُفِق في نيودلهي بغية إكمال جولة الدوحة في العام 2010. كذلك شجعت اللجنة كل أعضاء منظمة التجارة الدولية على المساهمة في العمل لتوصيل جولة الدوحة إلى خاتمة عن طريق المفاوضات و المرونة و الحلول التوفيقية. هذا واعترفت اللجنة بأن إكمال جولة الدوحة سوف يُسهّل في تعافي الأزمة الاقتصادية العالمية و يمكن النمو في الطلب على القطن و المنتجات القطنية من ضمن أمور أخرى. وتم التنويه بأن خاتمة ناجحة لجولة الدوحة من شأنها أن تُنمّي تعاوننا دولياً أوسع في جهات ملحة أخرى من ضمن الأجندة العالمية. و كذلك حثّت اللجنة كل الدول على مقاومة الإجراءات الحمائية في الرد على الأزمة الاقتصادية الحالية.

**7.1 -** ذكرت السكرتارية أن أكثر من 80% من إنتاج القطن العالمي تلقى دعماً من حكومات في الموسم 2009/2008. و ارتفع إجمالي هذا الدعم إلى أكثر من الضعف بحيث وصل مبلغ 6 مليارات دولار أمريكي. وفي تقريرها للجنة ذكرت السكرتارية أن هذا الدعم الحكومي يشوّه اقتصاد القطن العالمي و لهذا دعت عدّة دول إلى إسقاطه على الفور.

**7.2 -** رحبت اللجنة بإسهامات مجموعة الدول الأوروبية و الولايات المتحدة و غيرها من المانحين التقليديين في مجال المساعدة التنموية للقطن. إن المنح القيمة التي قدمتها البرازيل و الصين الشعبية و الهند في منبر دول التعاون جنوب - جنوب. وقد كرروا التزاماتهم في الوفاء بتبرعاتهم كما انعكست في الجدول الذي تعمل منظمة التجارة العالمية على إعداده. و حثّت اللجنة على إبداء الاحترام الكامل و الترابط المنطقي في المعاملة ذات المسارين. أما سكرتارية اللجنة الاستشارية الدولية للقطن فإنها متشجعة لمواصلة تعاونها مع سكرتارية منظمة التجارة الدولية.

**7.3 -** أعادت اللجنة تأكيد دعمها للموقف القائل بأن القطن هو اختبار للبُعد التنموي في جولة الدوحة، وأنه لن يحصل اختتام لجولة الدوحة بدون حلّ لمسألة القطن، كما أن النهاية المرضية لملف القطن تعتمد على إكمال جولة الدوحة.

## 8- تقدير لكرم ضيافة إفريقيا الجنوبية:

تقدمت اللجنة الاستشارية الدولية للقطن بالشكر الى شعب وحكومة إفريقيا الجنوبية وصناعة القطن فيها لحسن ضيافتهم وكرمهم والتنظيم الممتاز كونهم مضيفين للجلسة العمومية الثامنة والستين. كانت إفريقيا الجنوبية أول دولة في القارة الإفريقية تتبنى قطن التكنولوجيا الحيوية. ولما كانت إفريقيا الجنوبية دولة صغيرة من حيث انتاج القطن واستهلاكه، إلا أنها دولة ذات القلب الكبير إذ أنها تولي اهتماماً بالغاً في رفاة أصحاب المزارع الصغيرة.

#### 4- إنتاج القطن يعزّز الأمن الغذائي

أبلغ ممثلو المزارعين اللجنة أن الأمن الغذائي يبدأ من منطلق الأمن في الدخل. وأشارت اللجنة إلى أن الدخل النقدي الذي يجنيه المزارعون من إنتاج القطن يُمكن أرباب البيوت منهم، خاصة أولئك الذين يفلحون في أراض جافة وشبه جافة حيث يصعب إنتاج المحاصيل الغذائية من أجل الإنفاق على الطعام والعناية الصحية و الرسوم المدرسية والضروريات الأخرى التي لا تكون متوفرة بطرق أخرى. كذلك، أشير إلى أن القطن يُساهم في الأمن الغذائي بتوفير الوسائل اللازمة لتحويل المدخلات وذلك بتقوية خصوبة التربة و إعاقه نمو الحشرات و الأمراض و ذلك ضمن نظم تتم إدارتها بصورة صحيحة في تدوير المحاصيل التي تشمل القطن و غيره من الغلات. هذا وقد ذكر أنه لكي يتمكن القطن من أداء دوره الريادي في التنمية الاقتصادية وفي الإسهام في مجال الأمن الغذائي يتوجب على المزارعين الحصول على مدخلات ذات جودة عالية و كذلك الإقراض و التكنولوجيا المناسبة إضافة إلى أسواق مضمونة. و في هذا الخصوص، أعطت اللجنة توجيهاتها إلى السكرتارية لتعريف أو تحديد إسهام القطن للأمن الغذائي بصورة أفضل.

#### 5- تسهيل إنتاج القطن عند أصحاب المزارع الصغيرة:

لقد تم تبليغ اللجنة أن التعطيلات في تزويد المدخلات و المستوى المتدني في تبني التكنولوجيا بالإضافة إلى النظم التسويقية الضعيفة قد نتج عنه انخفاض في العائدات للمزارعين و التي، مجتمعة مع تأخيرات في الدفع لهم هما بمثابة المعوقات الرئيسية لإنتاج القطن لدى أصحاب المزارع الصغيرة. و اللجنة إذ استذكرت نتائج المناقشات التي جرت أثناء الجلسة العمومية السابعة و الستين في أوغادوغو في العام 2008، اتفقت على أن إنتاج القطن لدى صغار المالكين يعتمد على جودة التدريب الذي يتلقوه من وكلاء الإرشاد و من المزارعين، و أنه في أغلبية الحالات تكون المدارس الميدانية للمزارعين مجتمعة مع قطع المزارع النموذجية هي أكثر أشكال التواصل الفعال مع صغار المزارعين. و توصي اللجنة الاستشارية الدولية للقطن (ICAC) بأن الأبحاث الزراعية و أعمال الإرشاد يجب أن تحظى بزيادات في الدعم من القطاع العام. و هنا أعرب بعض أعضاء لجنة عن تأييدهم لتأسيس مركز دولي لأبحاث القطن كما وُجّهت تعليمات إلى اللجنة الدائمة لتعطي هذا الاقتراح اعتباراً أكبر. و بعض الدول، مدركة أهمية الأدوار التي تلعبها شركات القطن في أفريقيا في مجال التنمية الاقتصادية، و كجزء من الإستراتيجية الشاملة لدعم صغار المزارعين اقترحت أن تأخذ الحكومات في الاعتبار مسألة تغطية العجز لدى شركات القطن.

#### 6- المنتجات المتفرعة عن القطن وإضافة قيمتها:

أبلغت اللجنة الاستشارية الدولية للقطن أن بذور القطن قبل حلجها وسيقان نبتة القطن والتي في مجموعها من المنتجات المتفرعة عن القطن، كانت في العادة تلقى انتباهاً محدوداً بسبب قيمتها المنخفضة نسبة إلى شعيرات القطن. غير أنه مع ازدياد أسعار الحبوب والبذور الزيتية منذ العام 2006، أخذت المنتجات الفرعية تحظى باهتمام أكبر هذه الأيام. و عليه قامت اللجنة بمراجعة المعلومات المتوفرة عن مجموعة واسعة من استخدامات زيت القطن و سيقان النبتة في استخراج الزيوت النباتية، و السمن النباتي و علف الحيوانات و الصابون و الورق و مواد لاصقة في صناعة الطوب فضلاً عن مواد أخرى. كذلك من المتوقع أن تُسهّل الأبحاث الجديدة زيادة في استخدامات زيت القطن في الاستهلاك البشري مما سيزيد في جملة الاستخدامات و القيمة المتأنتية من بذور القطن. هذا و رفعت اللجنة شكرها إلى الصندوق المشترك للسلع (CFC) وإلى مدير إدارة الصندوق السفير علي م. متشومو Ali M. Mchumo لتقديم الدعم للمشاريع التي من شأنها تسهيل الاستخدام التجاري لسيقان نبتة القطن في صناعة مواد البناء. وتجدر الإشارة إلى أنه من ضمن المشاريع التي مولها الصندوق المشترك للسلع

## اللجنة الاستشارية الدولية للقطن

### البيان الختامي للجلسة العمومية الثامنة والستين

#### "دور القطن في التنمية الاقتصادية وضمن الأمن الغذائي في أوقات أزمة اقتصادية عالمية"

اجتمعت اللجنة الاستشارية الدولية للقطن ( ICAC ) في كيب تاون ، افريقيا الجنوبية، في الفترة بين السابع والحادي عشر من شهر سبتمبر/أيلول سنة 2009 في جلستها العمومية الثامنة والستين منذ تأسيس اللجنة قبل سبعين سنة في العام 1939. اشترك في الجلسة ثلاثمائة و ثلاثة و ستون شخصاً من بينهم ممثلون عن تسع وثلاثين حكومة وعشر منظمات دولية.

#### 1- احتفلت اللجنة بسنة 2009 على أنها السنة الدولية للألياف الطبيعية (IYNF):

أعلنت الجمعية العامة التابعة للأمم المتحدة سنة 2009 سنة دولية للألياف الطبيعية اعترافاً منها بإسهامات صناعات هذه الألياف في اقتصادات كافة الدول تقريباً، وفي دور الألياف الطبيعية في تدعيم مداخيل مئات الملايين من الناس ، وإقراراً منها بفوائد هذه الألياف للمستهلكين وللبيئة. وبناء على ذلك قامت اللجنة الاستشارية الدولية للقطن بتوجيه الشكر الى منظمة الزراعة والأغذية التابعة للأمم المتحدة ( FAO ) لقيامها بالتنسيق للإعلان عن السنة الدولية للألياف الطبيعية. إن صناعة القطن و صناعات الألياف الطبيعية الأخرى مثل جوز الهند، والكتان، والقنب، والحرير، والسيزال، والصوف، وغيرها لتشجيع المستهلكين في كل أرجاء العالم على "اكتشاف الألياف الطبيعية".

#### 2- تباشيرُ زيادةٍ متواضعةٍ في الاستهلاك:

تلقت اللجنة تقريراً من السكرتارية يقول ان استهلاك القطن في العالم انخفض بنسبة 12% في الموسم المُنتهي في 31 يوليو/تموز 2009، الأمر الذي يُعتَبَرُ أكبرَ نسبةٍ انخفاضٍ من سنة الى أخرى منذ العام 1920 على الأقل و قد تم اعتبار الانخفاض على أنه جاء نتيجة مباشرة للأزمة المالية العالمية. ذُكر أن السكرتارية تتوقع أن يرتفع استخدام القطن عالمياً ارتفاعاً متواضعاً أثناء الموسم الحالي بافتراض تحسن تدريجي في نمو الاقتصاد العالمي. وذكرت السكرتارية ان أسعار القطن كانت متقلبة بشكل يفوق العادة أثناء الموسم السابق، وأن متوسط مستوى الأسعار قد انخفض. وعلى افتراض أن ظروفًا اقتصادية عادية ستطرأ فمن الجائز حينئذ أن تعادل تقلبات الاسعار أثناء موسم القطن الحالي. ولكن السكرتارية تتوقع أن يكون من غير المحتمل أن يرتفع مستوى متوسط الاسعار في العالم بشكل ملحوظ.

#### 3- و أشارت اللجنة أن صناعة القطن آخذة في مواجهة زيادة في التضيق على مواردها، كما أن اللجنة تشجع تبني ممارسات جديدة من شأنها النهوض بالإنتاجية.



# Inauguration

9:00 hr. Monday September 7, 2009

Dr. Eugene Brock in the Chair

The CHAIR called the meeting to order.

He said that it was a privilege for South Africa, and more particularly Cape Town, to host the 68th Plenary Meeting of the ICAC. He noted that the economic importance of cotton and its contribution to food security justified the deep involvement of governments in an international organization dedicated to improving all the factors that contribute to the growth and health of cotton. He noted that significant progress had been achieved in the 16 years during which he had been involved with the ICAC, and thanked the Committee for its work. He reminded delegates of the theme of the meeting, "The Role of Cotton in Economic Development and Ensuring Food Security During a Period of Global Economic Crisis" and urged participants to keep in mind this theme over the course of the meeting. He said that cotton has in the past and can in the future play a significant role in the lives of the people of Africa and other parts of the world. He wished luck in achieving a successful meeting to all the participants. Dr. Brock's remarks are a statement of the meeting.

The CHAIR introduced Ms. Vangile Brenda Titi, Deputy Director General: Agriculture Support Services, Department of Agriculture, Forestry and Fisheries in South Africa, to present Introductory Remarks on behalf of the Minister for Agriculture, Forestry and Fisheries, H.E. Ms. Tina Joemat-Pettersson. She said that South Africa was honored by the confidence bestowed by the ICAC to host the 68th Plenary Meeting this year in Cape Town. She said that much gratitude should go to Ms. Liako Moahloli and Dr. Siphwe Mkhize, for ensuring that the relationship between the ICAC and the government of South Africa grew stronger over time. She welcomed all participants to the meeting and expressed hopes that member and non-member countries would engage constructively to grow and sustain the cotton industry for the benefit of current and future generations.

Ms. Titi reported that South Africa was very much affected by the world economic crisis and was experiencing deeper poverty. For the first time since the 1800s the agricultural sector is bigger than the mining sector, thus giving the opportunity to all stakeholders in agriculture, including the cotton industry, to come up with plans to support their industry and contribute to poverty alleviation, job creation, rural development and sustainability. She also mentioned that rising agricultural production costs and food prices had made the South African food system more fragile and more vulnerable to shocks, pushing many people into conditions

of hunger and deprivation and causing many farmers to abandon land. She noted that the theme of the meeting, "the Role of Cotton in Economic Development and Ensuring Food Security during a Period of Global Economic Crisis", was particularly well chosen. She said that the Department of Agriculture, Forestry and Fisheries in partnership with the cotton industry in South Africa was already taking steps in this direction, through the SA Cotton Industry Strategy. This strategy aims to broaden participation from small-scale producers in cotton production, to grow cotton farm output to more than 80,000 tons, to raise productivity and expand exports, and to accelerate the elimination of unfair competition through promoting regional and international cooperation and through more effective lobbying in international trade forums. She expressed the hopes of the South African government that the 68th Plenary Meeting of the ICAC would benefit the South African cotton industry in the areas of cotton research, trade and standardization.

Ms. Titi also talked about the macro policy intervention enacted by the government of South Africa, the "Broad Based Black Economic Empowerment Act" No. 53 of 2003, which promotes increased participation of previously marginalized groups and the elimination of inequalities in the economy. The adaptation of this framework to agriculture, via the "Agricultural Broad Based Black Economic Empowerment (AgriBEE) Charter, facilitated a number of partnership initiatives between government and industry stakeholders, including the cotton industry. She said that lessons from the Plenary Meeting would help to enhance this progress.

Ms. Titi expressed hopes that the Plenary Meeting would deliberate on the involvement of governments in the cotton sector and come up with strong statements for the elimination of government subsidies that distort the market and restrict market access. She recognized the support of the ICAC for the successful conclusion of the Doha Round.

Ms. Titi said that the Department of Agriculture, Forestry and Fisheries recognizes 2009 as the International Year of Natural Fibers and is promoting this initiative. She said that the IYNF had a role to play in the Millennium Development Goals (MDGs), in particular MDG 1 (attacking poverty and hunger), MDG 7 (contributing to environmental sustainability) and MDG 8 (promoting the formation of an international partnerships).

She expressed hopes that the meeting would be successful and that participants in the meeting would enjoy their stay in Cape Town and its numerous sightseeing attractions. Ms. Titi's

remarks are a statement of the meeting.

The CHAIR thanked Ms. Titi and introduced H. E. Ambassador Ali Mchumo, Managing Director of the Common Fund for Commodities (CFC), to give his Opening Observations. H.E. Ambassador Mchumo expressed his appreciation to the organizing committee for inviting him to make opening remarks during the inaugural session. He also thanked the Government of South Africa for hosting the meeting in the beautiful city of Cape Town, for its warm welcome and hospitality, and for providing excellent facilities. He explained that the CFC is an autonomous intergovernmental financial institution with a membership of 106 nations and nine intergovernmental organizations. He reminded that the 68th plenary meeting was taking place at a time when the world was gradually emerging from a global economic and financial crisis, and this meeting would provide the opportunity to examine how cotton could contribute to this recovery. He reported that the global cotton agenda was affecting tens of millions of cotton producers, workers in the processing industries, trade and ultimately in the textile industry. He explained that the agenda of the 68th Plenary Meeting covered a broad range of issues, including linkages between the cotton sector and food security, the importance of small-holder production, and ways and means of increasing production efficiency and cotton farmer income, and income generation through use of cotton by-products. He said he would elaborate further on the role of the CFC in the field of cotton development, in the context of their close co-operation with the ICAC, during the 2nd Plenary Session. Ambassador Mchumo's remarks are a statement of the meeting.

The CHAIR thanked H.E. Ambassador Ali Mchumo. The CHAIR asked if there were any amendments to the agenda and, seeing none, declared that the proposed agenda was approved.

The CHAIR introduced the keynote speaker Mr. Berrye Worsham, President of Cotton Incorporated (USA), to give his presentation "Positioning Cotton As a Solution to 21st Century Problems." Mr. Worsham explained that factors affecting global markets and the planet would play an important role in shaping cotton's future and that the cotton industry had the opportunity to influence change and to regain market share lost to synthetic fibers. He explained that there were four global challenges standing out as key to shaping the market for cotton in the next century: (1) a growing global population and growing real incomes; (2) the need to double the world's food and feed supply in the next half century despite the need to supply more energy from agriculture; (3) the need to change

the trajectory of the world's need for dwindling natural resources such as oil and water; and (4) continuing to supply global consumers with better and more responsibly made products in all industries. He reported that these challenges were already affecting the cotton supply chain and that solution to these challenges involved four primary areas: (1) the need for technology in general, and biotechnology specifically, to continue to improve cotton yields globally; (2) the necessity for improvement in the sustainability of the cotton supply chain, especially in the area of textile processing; (3) the development of new innovations for cotton products that meet the needs of a more discerning consumer; and (4) a more robust communication strategy with the world's consumer and the global textile supply chain. He reported that Cotton Incorporated and Cotton Council International were working jointly in many areas (involving research and promotion strategies) to help all cottons of the world compete with petroleum-based synthetic fibers. He concluded by emphasizing that other countries than the United States would need to greatly enhance their efforts for the cotton industry is to reach its full potential. Mr. Worsham's presentation is a statement of the meeting.

The CHAIR recognized Dr. Sebahattin Gazanfer, Chair of the Private Sector Advisory Panel (PSAP), to give his report. Dr. Gazanfer recalled that the PSAP was formed in 1999 and thanked the Chairman for his efforts to form the PSAP. He also noted that the PSAP represents three major segments of the cotton industry: cotton producers, merchants and spinners in both developed and developing countries. He highlighted a number of issues considered as important by the PSAP:

- 1) Availability of Finances for Cotton Trade,
- 2) Direct Support to the Cotton Industry,
- 3) Principle of Contract Sanctity,
- 4) Cotton Futures Contract,
- 5) Green House Gas (GHG) Emissions,
- 6) Phytosanitary Requirements for Trade in Cotton,
- 7) the Doha Round,
- 8) the proposition of a New International Cotton Classing and Marketing School, and
- 9) the Rotation of PSAP Officers.

He said that Mr. Ahmed El-Bosaty of Egypt was elected Chair of the PSAP for 2010, and Mr. Dhiren Sheth of India was elected Vice Chair. He concluded by wishing to all participants a very productive, successful and enjoyable meeting. The Report of the Private Sector Advisory Panel (PSAP) is a statement of the meeting.

The delegate of ARGENTINA inquired whether it was possible to ask questions to speakers during the Inaugural Session. The CHAIR answered that there would be time to ask questions later in the session.

The CHAIR introduced Dr. Ashraf El-Rabiey, Chair of the Standing Committee, to give his

report. Dr. El-Rabiey expressed to the Government and the people of South Africa the genuine appreciation of the ICAC for hosting the 68th Plenary Meeting. He said that since arrival in this beautiful city, Cape Town, all delegates felt welcomed, and that all South Africans were very friendly and helpful in every way.

Dr. El-Rabiey noted in all meetings, there had been a common element for the people that work in the cotton industry. They all work with a lot of passion, whether they are very simple farmers, or very famous fashion designers. Dr. El-Rabiey thanked the delegates of the member countries and the staff of the Secretariat for their dedicated work and support during the past year. He also thanked the officers of the Committee and other active members on other subcommittees.

He reported that during the past year, the Standing Committee had five meetings, including two outside Washington DC. The 498th meeting was held in New York, at the Fashion Institute of Technology (FIT), where a panel discussion involving people from the fashion industry took place. The 500th Meeting was in North Carolina where the Standing Committee visited a cotton farm and a company that devotes its work to cotton research and cotton promotion. They were able to see the latest products that showed that cotton can compete effectively with other fibers.

Dr. El-Rabiey reported on some of the topics that the Standing Committee dealt with during the past year, including biotechnology in cotton, an update on the work of the ICAC Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP), government support to the cotton industry, registration of cotton exporters by the government of China (Mainland), the Doha Round, and ICAC membership. Regarding the Doha Round, Dr. El-Rabiey stressed that Egypt supports an outcome on cotton that is compliant with the Hong Kong Mandate. Egypt aligns itself with the position of the C-4 in that regard. It attaches great importance to this issue as it touches on millions of farmers in Africa.

Dr. El-Rabiey endorsed the nominations of Mr. Azmat Ali Ranja of Pakistan as the new Chair of the Committee, Mr. Patrick Packnett of U.S.A. as First Vice Chair, Mrs. Lily Munanka of Tanzania as Second Vice Chair.

Dr. El-Rabiey expressed his deep appreciation and thanks to the Standing Committee members and the Secretariat.

He concluded by wishing all participants a successful meeting, a very pleasant stay in Cape Town and to all Muslim brothers and sisters a Happy Ramadan, or as they say in Egypt, Ramadan Kareem! The Report of the Chairman of the Standing Committee is a statement of the meeting.

Dr. El-Rabiey said that last year the ICAC de-

cided to recognize a cotton researcher every year. The 2009 program was announced in February/March 2009 and a panel of five anonymous judges from four countries was selected. The first "ICAC Cotton Research of the Year" is Dr. Keshav Rai Kranthi of the Central Institute for Cotton Research in India. Dr. Kranthi is an entomologist by training and has developed technologies that have been patented in India for the benefit of millions of small growers. He personally congratulated Dr. Kranthi on winning the first ICAC award and invited him to receive the trophy and the certificate.

Dr. Kranthi thanked the ICAC for creating this award and for awarding him this recognition. He thanked his mother, his wife and his daughter. He said that by recognizing him, this award was recognizing all his countrymen. He added that he would have the opportunity to speak about his vision on world cotton research during the Fifth Open Session (Technical Seminar) on September 10.

The CHAIR wished good luck to Dr. Kranthi in his work and thanked the ICAC for creating this recognition.

The CHAIR introduced Mr. Terry Townsend to give his report as executive director.

Mr. Townsend thanked the Chair and Member Governments of the ICAC for the opportunity to address the plenary meeting. He noted that 2009 marks the 70th anniversary of the founding of the ICAC at an International Cotton Meeting held in Washington, DC at the invitation of the Government of the United States of America during 5-9 September 1939. He observed that even as fighting was starting in what is now called World War Two, countries felt that international cooperation in cotton was of sufficient importance to conduct the Meeting that resulted in the establishment of the ICAC.

He noted that obviously, much has changed since the founding of the Committee. However, he observed that while the activities of the Committee have changed over 70 years, the mission of the ICAC remains the same: To assist governments in supporting a healthy world cotton economy by raising awareness of cotton issues, by providing information necessary for decision-making and by facilitating cooperation among industry segments and governments on matters of shared international concern. The purpose of a plenary meeting is to move forward through agreements to cooperate and through the identification of best practices appropriate for national adoption.

Mr. Townsend noted that the lengthy theme of this year's plenary meeting with two related subjects is emblematic of the complex problems facing the world cotton industry and the economic crisis in which the industry has been operating. He said that during the cotton season just past, world cotton consumption fell by 13%,

the largest percentage decline since the formation of the Committee, and so a focus on the economic crisis is necessary. And, as speakers during this plenary meeting will note, cotton can serve as a solution to the problems confronting the world economy and rural areas.

Quoting the International Forum of Agricultural Producers (IFAP), Mr. Townsend said that food security is more than cheap food for urban residents, and strategies to promote food security must facilitate increases in incomes by farmer households. He noted that cotton can contribute to food security by financing inputs that improve soil fertility, by improving the technical knowledge of farmers which can lead to higher food crop yields, and by providing cash income to be used for school fees, health services, food and other necessities.

Mr. Townsend thanked the Government of South Africa for hosting the 68th Plenary Meeting. He acknowledged the excellent work by expert panels and task forces established by the Committee, and he thanked members of the Standing Committee for their work on behalf of the cotton industry.

The CHAIR thanked Mr. Townsend for his report. The Report of the Executive Director is a statement of the meeting.

The CHAIR recognized the delegate of ARGENTINA, who insisted that the Plenary Meeting should be the opportunity not only to listen to presentations but also to interact with speakers in order to reach a more advanced level of understanding of the issues and to discuss these issues in more depth. He asked Mr. Worsham how long it would take to develop commercial cotton varieties with no gossypol in the seeds. Mr. Worsham answered that the first generation of seeds with no gossypol was developed, but that it would take multiple generations to develop a stable product. He said that hopes were that such a variety could be developed in the coming decade.

The delegate of ARGENTINA asked whether it would be useful to consider the creation of a new international body in charge of cotton promotion. Mr. Townsend answered that the issue of cotton promotion would be discussed in detail during the Third Breakout Session organized by the International Forum for Cotton Promotion (IFCP) on September 9: "Enhancing Demand for Cotton Products."

The CHAIR invited TURKEY, host of the 66th Plenary Meeting, to deliver welcoming remarks on behalf of all delegates. The delegate of Turkey thanked the Department of Agriculture, Forestry

and Fisheries of South Africa and Cotton SA, and the ICAC Secretariat, for organizing the 68th Plenary Meeting. He noted his firm conviction that the event would enhance worldwide cooperation on all aspects of cotton. He noted that in addition to being a tool of economic development and technological progress, cotton provides textile fibers and oil for humans, and that cottonseed itself could become in the near future an important source of food for humans. He reminded that the Cape was named "Cape of Good Hope" because of the great optimism engendered by the opening of a sea route to India and the Far East, and that the same optimism was needed in order to get rid of the economic crisis currently plaguing countries. He concluded by emphasizing the role of this Plenary Meeting to not only provide participants with a multidimensional point of view about the role of cotton in economic development and food safety, but also to equip them with the very necessary hope, optimism and steadfastness to tackle the global economic crisis.

The CHAIR thanked the delegate of TURKEY for his remarks.

Seeing no additional business, the CHAIR adjourned the Inaugural Session of the 68th Plenary Meeting at 11:10 am.

## First Plenary Session

### *Overcoming Impediments to Progress in Multilateral Trade Negotiations*

15:00 hr. Tuesday September 8, 2009

Mr. Chiedu Osakwe in the Chair

The CHAIR invited Andrei Guitchounts, Economist for the Secretariat, to report on government support to the cotton industry.

Mr. Guitchounts reported that subsidies to the cotton industry, including direct support to production, border protection, crop insurance subsidies, minimum support price mechanisms and export subsidies, rose by more than twofold from \$2.7 billion in 2007/08 to an estimated \$5.9 billion in 2008/09. Ten countries provided direct government support in 2008/09, averaging 14 cents per pound, compared with 8 cents per pound in 2007/08. The increase in government support is explained primarily by the significant decline in cotton prices during 2008/09. In addition to direct support to production, declining domestic cotton prices in 2008/09 triggered several types of government interventions aiming to support producers' revenues in a larger number of countries. As a result of decreased international prices, the estimate of government support to cotton production resulting from minimum support price mechanisms and border protection policies rose from \$614 million in

2007/08 to an estimated \$2.1 billion in 2008/09. The level of direct government assistance provided through export programs is estimated to have decreased from \$400 million in 2005/06 to \$30 million in 2007/08, and is estimated at \$26 million in 2008/09. Mr. Guitchounts gave details about government support to the cotton sector for the following countries and regions: the United States, China (Mainland), the European Union, India, Pakistan, Turkey, Brazil, and Mexico. The report *Production and Trade Policies Affecting the Cotton Industry* is a document of the meeting.

The CHAIR thanked Mr. Guitchounts and asked delegates if they had any questions about this report.

The delegate of INDIA noted that the 5% subsidy on cotton exports that was implemented in India during 2008/09 had been withdrawn on June 30, 2009.

The delegate of PAKISTAN asked if the spike in government support to the cotton industry in 2008/09 was related to the global economic downturn. Mr. Guitchounts answered that government support to the cotton sector is inversely correlated with cotton market prices, and he said

that the economic recession had greatly weakened demand for cotton leading to lower prices. Thus, the increased support to the cotton industry in 2008/09 was related to the recession.

The delegate of ARGENTINA noted that a significant share of world cotton production was supported in 2008/09. He added that he could understand the support given to the cotton sector in developing countries where food security can be an issue, but not the support given to the cotton sectors of developed countries where food needs are covered. Mr. Pellegrinos' remarks are a statement of the meeting.

The CHAIR thanked Mr. Guitchounts and the Secretariat of the ICAC for their report on government support to the cotton industry. The CHAIR expressed, on behalf of himself and the WTO, his appreciation to all the ICAC members and government representatives for making possible this annual discussion on multilateral cotton trade negotiations. He noted that the ICAC has made important contributions to the Doha Development Agenda (DDA) negotiations on cotton. He said that the purpose of the panel discussion was to brief ICAC Members on a range of issues cutting across the DDA, through a Question and Answer process with

panelists. The panel discussions would focus on progress in the Doha Round; the trade policy and development assistance aspects of the cotton initiative; South-South Cooperation for Cotton Sector Development; domestic cotton sector reforms; the effects of the global financial and economic crisis on the cotton sector; and, finally, the efforts of Director-General Pascal Lamy to bring about progress on the cotton dossier in his Consultative Framework Mechanism on Cotton (DGCFMC).

The CHAIR introduced the members of the panel: H.E. Prosper Vokouma, Ambassador Extraordinary and Plenipotentiary, Permanent Representative, Permanent Mission of Benin to the United Nations, representing the C4 GROUP; Mrs. Anna Saarela, Directorate General Agriculture, European Commission, representing the European Commission; Dr. J.N. Singh, Joint Secretary, Ministry of Textiles, Government of India, representing India; Mr. Thabo Chauke, Director – Multilateral Organizations, Trade Policy & Negotiations Unit, Department of Trade & Industry, Government of South Africa; and Mr. Patrick Packnett, Assistant Deputy Administrator, Foreign Agricultural Service, United States Department of Agriculture. The Chair stressed that the Members, which these panelists represented had made vital and positive contributions to the launch and continuing evolution of the Doha Round, including the cotton dossier.

The CHAIR noted that cotton reflected two developments at the WTO: 1) all WTO members agree that cotton has become the test of the development content of the Doha Round; and 2) cotton has become an example of international cooperation within the WTO negotiations, reflecting both progress and challenges to be further addressed. (Cotton had been introduced two years after the launch of the DDA, but all members agreed to the adjustment of the agenda to include the Sectoral Initiative on Cotton (SIC). Progress had been made, but there were still outstanding issues to be addressed in the context of the broader negotiations in agriculture and the overall Doha Round. He expressed his appreciation to ICAC members and the ICAC Secretariat for their support in the past four years.

The CHAIR invited Ambassador Vokouma to present the views and positions of the C4 group on progress in the DDA and the efforts of the C4 group in this regard. Ambassador Vokouma explained that the four countries included in the C4 group (Benin, Burkina Faso, Chad and Mali), which are amongst the poorest, have a stake on the cotton issue within the DDA and the task of working towards a successful conclusion of the negotiations on cotton and the DDA. He said that the C4 group was currently working with Brazil, the European Union and the United States (known as the Cotton Quad) at the WTO in order to find a solution within the talks on agriculture. Currently only one proposition for cotton, prepared by the C4 group, has been offered. The

proposed formula is related only to domestic support to cotton production, and would ensure that the reductions in domestic support will be higher for cotton than the reductions agreed within the overall agricultural framework. An implementation period of six years is suggested for developed countries. He added that all the efforts of the C4 group are now targeted against support to cotton production provided in the United States and the European Union. In addition to multilateral negotiations, the C4 group has started bilateral discussions with the United States and they will also start talks with India and China. Ambassador Vokouma's remarks are a statement of the meeting.

The CHAIR thanked Ambassador Vokouma and invited Dr. Singh to give a report on the recent WTO meeting that took place in New Delhi on September 3-4, 2009. Dr. Singh explained that during the mini-Ministerial meeting, 35 WTO members agreed to conclude DDA negotiations by 2010. In addition they asked senior officials to meet in Geneva within 10 days to start preparing these negotiations. Dr. Singh noted that the ICAC should also reaffirm its support, as it had done in previous years, for a successful, ambitious and balanced conclusion of the Doha Round in 2010.

The CHAIR thanked Dr. Singh and invited Mr. Packnett to present US positions on current efforts to conclude the Doha Round. Mr. Packnett explained that the United States was committed to a successful and rapid completion of the DDA, for cotton as well as for other commodities. He noted that cotton was being addressed at the WTO along two tracks, trade and development, and he noted that development aid is being provided by WTO members to C4 countries.

The CHAIR thanked Mr. Packnett and invited Ms. Saarela to comment on the position of the EU. She thanked the ICAC for giving her an opportunity to present the views of the EC on the Doha Round and on the cotton issue, in particular. She noted that as India and Burkina Faso have already mentioned the DDA process has been re-energized in New Delhi in the previous week, the objective being to finalize the Round by 2010. She explained that in accordance with the reform implemented in the cotton sector since 2006, the EU had already moved away from its most trade-distorting support to cotton, in line with the overall reform of the Common Agricultural Policy (CAP). In particular, the reform implemented in the cotton sector since had eliminated distorting subsidies. She noted that the EU position had been bold and ambitious in DDA commitments: cotton imports into the EU are already duty and quota free; there are no cotton export subsidies, and domestic cotton support, the most trade-distorting subsidies to cotton production, have already been fully eliminated. She said that the EU believed that what it had already implemented respects the Hong Kong mandate regarding cotton (for an

ambitious, expeditious and specific outcome). As far as the EU is concerned:

- concessions made by the EU on cotton are indeed specific;
- more ambitious than for other commodities, as the EU has already eliminated its most trade-distorting subsidies for cotton, (in addition, there are no duty and no export subsidies on cotton); and
- EU concessions are certainly expeditious: in that sense they go even further than the Hong Kong mandate, as they have already been implemented.

The EU will continue supporting a "specific, ambitious and expeditious" outcome for cotton in the Doha Round, and invites key developed countries to engage themselves on the way towards reform.

The CHAIR thanked Ms. Saarela and called on Mr. Thabo Chauke to give a broad overview of South Africa's position on the DDA and cotton. Mr. Chauke said that South Africa continued to play a constructive role in the DDA negotiations and supported a successful conclusion of the DDA. He noted that such a successful conclusion of the DDA could help countries emerge from the current economic crisis. He added that rhetorical support for a successful conclusion of the DDA was good, but that work still needed to be done in Geneva in order to achieve this outcome.

The CHAIR thanked Mr. Chauke and stressed two points: 1) all the calls coming from different groups, including the ICAC, are important in maintaining the positive momentum in the DDA, and 2) the conclusion of the DDA would make an important contribution to global economic recovery.

Continuing with the Panel discussions, the Chair noted that the trade policy aspects of cotton were being addressed within the framework of the agricultural negotiations on the basis of the three pillars of the negotiations namely: market access, export subsidies, and domestic support. He asked the panelists what progress had been made on cotton on these three pillars.

Ambassador Vokouma repeated that the C4 was working within the Cotton Quad on the cotton trade issue, that the C4 had made a proposition regarding a reduction in cotton domestic support and was waiting for answers to that proposal, and that the recent conclusions from the WTO meeting in New Delhi provided grounds for optimism.

Mr. Packnett said that the US position on cotton in the DDA was best addressed within the overall agricultural negotiations on the three pillars.

Dr. Singh said that India was working with Brazil, South Africa and other countries so that an ambitious, expeditious and specific outcome was achieved for cotton within the DDA.

The CHAIR thanked the panelists. He pro-

vided additional information regarding the Trade Policy Aspects of the cotton negotiations: the mandate of the WTO provided for the negotiations on the trade policy aspects of cotton within the overall agricultural negotiations, and on the basis of the three pillars. Regarding export subsidies, there was an agreement during the Hong Kong Ministerial in 2005 to end these subsidies, and WTO members reaffirmed this decision in the December 2008 draft modalities texts. On market access, in 2005 at the Hong Kong Ministerial Declaration, WTO Members agreed to duty and quota-free market access for cotton products from all Least Developed Countries (LDC). This was also reflected in the December 2008 draft modalities text. At the New Delhi Mini-Ministerial, participating WTO Members had agreed to continue to build on the progress as reflected in the 2008 draft modalities text. He stressed the fact that WTO members work on the basis of compromise and consensus, and not majority rule. He explained that the Cotton Quad was an informal grouping of countries working on the Cotton Dossier and that progress was been made albeit not as fast as would be desirable.

The CHAIR turned to the Development Assistance Aspect of the Cotton Dossier and invited Ambassador Vokouma to speak about the progress and challenges involved. Ambassador Vokouma reported that developing countries have benefited substantially from development assistance provided under the auspices of the DDA, and he noted that Brazil, China and India are providing significant assistance to African producers within the framework of South-South cooperation.

The CHAIR invited Ms. Saarela and Mr. Packnett to talk about the EU and US programs for development assistance to cotton producing countries. Ms. Saarela explained that cotton development assistance provided by the EU to African countries including the C4 countries, was guided by the EU-Africa Partnership on Cotton. She said that the total budget exceeded 300 million euros since 2004, of which half was contributed by the EC budget and half by EU member countries. In addition, the EU adopted an additional budget of 1 billion euros in 2008 (Food Facility) to improve food security in Africa, to be spent over three years.

Mr. Packnett said that the US public and private sectors worked closely with West and Central African countries to design the West African Cotton Improvement Program (WACIP). WACIP is overall an approximately \$28 million program, some \$19.6 million of which is aimed directly at the C4. WACIP is a program that invests specifically in cotton. WACIP is in addition to the normal development assistance provided by the US, and is in addition to the Millennium Challenge program.

The CHAIR asked if delegates had comments.

The delegate of ARGENTINA read three paragraphs of his report. He noted that because there is flexibility regarding direct payments from the green box, it seems that reductions in cotton subsidies from the Amber Box that might be decided in the DDA could be offset by increases in subsidies under green box programs, and therefore there might not be concrete benefits for the cotton sector. He added that Argentina is willing to work to achieve an ambitious outcome to the cotton issue in the DDA. He reiterated the need that WTO negotiations achieve a result that is in agreement with the objectives, in particular for cotton, in order to improve competitiveness in the cotton market.

The Delegate of POLAND noted that the results of the WTO meeting in India last week were very encouraging and that they were looking forward to concrete actions. He hoped that cotton would be included in the coming Ministerial meeting discussions, and that an understanding of how to treat cotton in this future meeting was needed. He said that Poland supported a positive resolution for cotton at the DDA, and deplored the government subsidies and the current difficult situation in the global cotton market. He expressed the hope that a satisfactory solution would be found not only for cotton but for all commodities, and not only for the agricultural sector but for all the sectors involved.

The CHAIR explained that following the recent WTO meeting in New Delhi, Chief Negotiators and Senior Officials would start working in Geneva on September 14. He said that a Ministerial Conference was planned for November 30-December 2, 2009 but that there were still consultations on the specific agenda of that meeting. WTO members agreed that this meeting would focus on the broad theme of the Global Economy and Strengthening the Multilateral Trading System. He added that at the New Delhi Mini-Ministerial, participants had converged on the position that development would remain central to the Doha Round.

The delegate of CHINA (TAIWAN) suggested that including cotton in the multilateral trade negotiations had perhaps complicated the issue for the C4. He asked the C4 group if they regretted bringing the cotton initiative to the WTO and whether they believed that the 2010 deadline could be met in light of the numerous missed deadlines in the past six years. He asked if they were considering other ways to achieve a reduction in cotton subsidies.

Ambassador Vokouma said that the C4 group would fight for a successful outcome to the cotton issue, even if there were from time to time periods of uncertainty and missed deadlines. He added that the C4 countries and other African countries producing cotton did not have a choice in this regard because of the importance of cotton to their national economies and the vital importance of maintaining the integrity

of multilaterally agreed rules. He said that they were only asking for the implementation of trade rules, not more aid. Nevertheless, the C4 group had several bilateral discussions with countries. He concluded by saying that the C4 countries believed that all the WTO members were negotiating in good faith, and their hope and objective were to obtain necessary concessions on cotton in the DDA in accordance with WTO rules.

The delegate of NIGERIA recognized the size of the cotton development assistance budget provided by the EU. He asked how the EU developed their cotton development assistance budget of 300 million euros. Was this budget considered adequate? Was the impact of this assistance measured and evaluated in the receiving countries? Were any additional interventions under consideration, in the event the current assistance budget did not prove sufficient?

The delegate of TURKEY also appreciated the amount of the cotton development assistance budget provided by the EU. He said this support appeared very timely, given the difficulties faced by the cotton sectors in Africa. He asked how the EU assistance was distributed amongst countries.

Ms Saarela said that the EU has been playing and will continue to play an active role on cotton in the framework of the Doha Round. It has been particularly supportive of the trade interests of developing countries. This is reflected in the EU's cotton related development assistance that remains guided by the EU-Africa Partnership on Cotton agreed in 2004. The total value of support mobilized since 2004 exceeds €300 million for cotton programs and projects.

This has been a substantial and major source of support that can be used in mitigating negative effects of the fall in cotton prices in the countries concerned. Europe's contribution is by far the most important contribution to cotton by any development partner. Regarding the EU-Africa Partnership on Cotton, the assessment is based on partnership, i.e. working together with beneficiaries. The EU does not impose the actions; rather, the scope of actions is based on the agreed upon Action Plan. The joint Action Plan of the EU-Africa Cotton Partnership includes actions in seven fields.

The EC has limited budgetary resources, which are programmed multi-annually, so there is not much room for additional financing initiatives. Project financing is based on assessment criteria applied to all proposals in transparent and equal terms. There is a close monitoring process of all financing projects, the latest report regarding the EU-Africa Partnership on cotton being concluded on May 2009. This information is also made available to the public on the website ([www.coton-acp.org](http://www.coton-acp.org)).

In addition, it should be noted that the EU places food security and appropriate responses to the global economic crisis high on its development

agenda, as exemplified by the approval of the €1 billion Food Facility in December 2008. This additional assistance (covering a three year period) was agreed and committed expeditiously in order to address the matter in a timely fashion.

Mr. Chauke noted that the cotton issue would test the DDA. He said one of the major positive things coming from the Cotton Initiative was to bring attention to WTO members of the injustice still existing in the cotton market. He noted that nothing prevented WTO members from reducing or eliminating their cotton subsidies before the DDA was concluded.

The CHAIR invited Dr. Singh to comment on South-South Cooperation for Cotton Sector Development, an initiative by Brazil, China and India.

Dr. Singh described the initiatives taken by India to cooperate with African countries on cotton matters: 1) in a spirit of South-South cooperation, India eliminated the import duties on cotton; 2) there were many private initiatives from Indian companies, in particular regarding organic cotton grown in the C4 countries and imported by India; and 3) India received many delegations from African Countries.

Ambassador Vokouma noted that it was not only the C4 countries but all African cotton producing countries that needed support. He said that potential cooperation with India was discussed in Addis Ababa earlier this year and that maybe more would come from this. He said that a project between Brazil and the C4 countries had already been implemented in Mali. He concluded by saying that all these cooperation projects were very important, while waiting for a conclusion of the DDA.

The delegate from MALI noted that they had benefited from assistance programs from the EU and the US since 2003, but that their main wish was that a successful outcome to the cotton issue happens in the DDA. He acknowledged the support provided by Brazil on the platform of South-South Cooperation for Cotton Sector

Development.

The delegate from ZIMBABWE asked Dr. Singh to provide details on the breakdown of participating countries at the New Delhi meeting. He noted that it would be tragic if development assistance was seen as a substitute for a resolution of the DDA. He also said that because the institutions providing development assistance to cotton producing countries have their own cost structure within these countries, he is unsure how much help the cotton farmers obtain in the end.

Dr. Singh said that there was a very broad representation from all regions of the world at the New Delhi WTO meeting.

Ambassador Vokouma added that the mini-ministerial meeting in New Delhi gathered all the principal trading powers and trade groupings in the Doha Round, such as the C4, LDCs, ACP, GRULAC, ASEAN, NAMA 11, etc.

The CHAIR summarized the issues emerging from the discussion:

- 1) ICAC has played an essential and positive role to support a balanced outcome and successful conclusion to the Doha Round, including on the Cotton Dossier. It would be useful for ICAC to continue to provide this support until the conclusion of the Doha Round.
- 2) As the international organization with primary responsibility for cotton, the assistance provided by ICAC and its Secretariat were contributing to the implementation of various aspects of the Doha Round mandate on cotton, particularly through the provision of data and implementation of projects on cotton development assistance in the Director-General's Consultative Framework Mechanism on Cotton (DGCFCM).
- 3) Cotton had become a test of the development dimension of the Doha Round. The Doha Round could not be completed without a resolution of the cotton issue. Yet it was clear that a satisfactory resolution of the

cotton dossier could only take place within the framework of balanced and successful conclusion of the Doha Round.

- 4) The ambitious and balanced conclusion of the DDA would provide a strong contribution to global economic recovery and growth, including the growth of the cotton sector. It is impossible to conceive of sectors that would thrive in isolation, in the broader context of crisis and recession in the global economy. A robust, prosperous and growing global economy was a necessary condition for individual sectors, such as cotton, to thrive and prosper. The ICAC and other contributors also had a stake in the ambitious and expeditious conclusion of the DDA in 2010.
- 5) It was stressed that there was no attempt to substitute or override the trade policy aspects of cotton with the development assistance aspects. WTO Members had agreed and were fully committed to the implementation of a 2-track mandate and to coherence between the two aspects. It was on this basis that Director-General Pascal Lamy periodically presented reports to WTO Members and would provide a Third Periodic Report as mandated to WTO Ministers at the 7th WTO Ministerial Conference this year. The 2-track treatment was exceptional in WTO negotiations. Members had been creative.
- 6) Brazil, India and China were making important contributions to development assistance for cotton on the basis of South-South Cooperation.
- 7) The WTO welcomed the annual opportunity to engage with ICAC Members and its Secretariat, under the leadership of Mr. Terry Townsend, the Executive Secretary.

The CHAIR thanked the ICAC and all members of the Panel for this discussion.

The CHAIR adjourned the meeting at 5:45 pm.

## Second Plenary Session

### Statements

9:00 hr. Wednesday September 9, 2009  
Dr. Eugene Brock in the Chair

The CHAIR called the meeting to order. He asked delegates to respect the 5-minute limit for each intervention. He first called on statements by delegates from international organizations.

The representative of the European Commission presented an update on the European Union (EU) development strategy regarding cotton. Since the last Plenary Meeting of the ICAC

in Ouagadougou in November 2008, cotton has remained an important aspect of the EU development projects. Cotton production in the EU continues to decline. A revision of the new cotton regime was adopted in 2008, maintaining decoupled support to producers and also providing support to the cotton ginning sector. The EU market for cotton imports remains open, but cotton imports have been declining due to a long-term decrease in cotton mill use. The EU textile and clothing sector continued to

contract in 2008 and 2009, but the EU remains the second largest exporter of textiles and clothing. EU development assistance to Africa was reconfirmed and a total exceeding 300 million euros was provided since 2004. Thanks to the cotton reforms already undertaken in its producing regions, the EU can take a proactive stance in the WTO negotiations on cotton. She thanked the ICAC for choosing the theme of the meeting on food security, noting that food security was high on the EU development agenda, as proved

by the budget of 1 billion euros recently approved and their significant assistance in the past year to countries hit by the food and economic crisis. She said that nine EU members states are members of the ICAC. The discussions to include the EU as a member of the ICAC are not yet concluded and will define how the EU is represented in the ICAC. She expressed her sincere appreciation to the government of South Africa and the city of Cape Town for hosting the Plenary Meeting. The EU's report is a statement of the meeting.

The representative of CABI International explained that it is a not for profit, intergovernmental organization established by a United Nations treaty level agreement between their member countries (currently 45). Its mission is to improve people's live worldwide by providing information and applying scientific expertise to solve problems in agriculture and the environment. CABI works with national and regional partners (both private and public) and has a wide global presence. One of the themes of CABI's scientific and development activities involves crops such as cotton, coffee and cocoa. CABI aims to improve the livelihoods of smallholder producers of these crops by improving productivity and increasing their market access. China (Mainland), India and Pakistan, large producers and consumers of cotton, are members of CABI, and therefore cotton is an important crop for the organization. CABI has been working on cotton for over 30 years. Much of this work has involved Integrated Crop and Pest Management, technology transfer and building capacity in a wide range of stakeholders. He mentioned a few cotton projects in Pakistan and Africa. He concluded by saying that much of CABI's work is based on biological control and ecological approaches to develop IPM regimes for producers. They have also helped farmers to deal with issues such as water management in the context of climate change. The CABI representative noted that cotton needs to think about how climate change will affect production and what can be done about it. CABI's report is a statement of the meeting.

The representative of CIRAD (Centre de coopération internationale en recherche agronomique pour le développement) explained that CIRAD is an international research organization for agricultural development that has been working for decades on the development of sustainable cotton production systems, particularly in West Africa, in partnership with national agricultural research organizations. He explained their three main areas of research: 1) the documentation and evaluation of local production systems, facilitating innovations based on farmers' knowledge; 2) the characterization and evaluation of biotic risks; and 3) the characterization and improvement of fiber processing. He announced that a new CIRAD Internet website would be available starting in October 2009, at [www.cirad.fr](http://www.cirad.fr). This

website will provide information on CIRAD research activities in general and cotton research in particular. He thanked the Chair and the ICAC for this opportunity to speak. CIRAD's report is a statement of the meeting.

The representative of the International Trade Center (ITC) thanked the ICAC and the government of South Africa for organizing the Plenary Meeting and giving him an opportunity to talk. The ITC is an organization working in partnership with the World Trade Organization (WTO) and the United Nations Conference on Trade and Development (UNCTAD), helping developing countries to export more products, including cotton and textile products. The Cotton Exporter's Guide will be available online soon and it will be linked to the ICAC website. ITC efforts on cotton are concentrated in Africa, where they emphasize three types of activities: 1) sector development strategy, 2) capacity building and market trading, and 3) South-South cooperation. He added that in the next few months the ITC would bring Africans to China (Mainland) and Bangladesh to share knowledge about cotton production and processing, and that there would be activities in India, Vietnam and Indonesia in 2010. The ITC's report is a statement of the meeting.

The representative from the United Nations Conference on Trade and Development (UNCTAD) thanked the ICAC for the invitation to the 68th Plenary Meeting. The UNCTAD has worked on cotton-related trade and development for many years. In the last two years, UNCTAD held meetings and workshops for stakeholders in the cotton industry. In December 2008, a meeting was organized in Geneva, reviewing the situation of the cotton sector in the evolving global economic and trade environment. Participants identified a series of critical needs, in particular the need for proactive action regarding investments and the need to develop further South-South cooperation, technical assistance schemes and regional solutions related to productivity, technology, competitiveness, value-adding enhancement and diversification. Another meeting planned in Cotonou in November 2009 will focus on the needs of the African low-income cotton exporting countries, identifying investment partnerships and concrete measures and actions needed to support the creation of linkages between cotton production, trade and investment. It will also help to identify the changes needed to achieve the "Vision for the development of the African cotton sector" in the next 10 to 20 years. The meeting will also build on the frameworks identified in "regional cotton strategies" being developed in Africa. He listed the major cotton activities of UNCTAD, including the InfoComm International Portal Development, where the cotton pages are maintained in partnership with the ICAC, the Sustainability Claims Portal, and the project to improve cotton sector financing in Cote d'Ivoire through the development of a guarantee fund. He added that a draft concept

note for the coming Cotonou meeting was being widely circulated for comments. The UNCTAD's report is a statement of the meeting.

The Executive Director of the IFCP (International Forum for Cotton Promotion) reported on the activities of the IFCP during the past year. He noted that cotton promotion activities increased significantly in 2008 and 2009, in particular in India, Brazil, China (Mainland), and the United States. Cotton has increased identification exposure across Europe thanks to efforts of the Bremen Cotton Exchange partnering with the Gdynia Cotton Association and the Italian Textile Association. The IFCP Speakers Bureau was launched, where IFCP invites industry experts to participate in panel discussions. Several issues have been addressed so far. The IFCP continues its work with higher education programs. He invited participants to the Plenary Meeting to attend the session "Enhancing Demand for Cotton Products" later that morning. He thanked the IFCP officers and members for the privilege of serving as Executive Director of the IFCP and for their participation. The IFCP's report is a statement of the meeting.

The delegate of the African Development Bank (ADB) saluted the ICAC and the South African government for inviting them to participate in the 68th Plenary Meeting of the ICAC. He explained that the Bank is a regional multi-lateral development finance institution mobilizing resources for the funding of economic and social development programs and projects in its member countries in Africa. The Bank organizes its work around three broad areas of intervention: Infrastructure development, Regional integration and Good governance and capacity building. It also places a premium on expanding private sector support and development, which are important for the cotton sector. As of December 2007, the Bank has funded 3,174 projects in 52 member countries through loans and grants amounting to over US\$66 billion since its inception. He emphasized that the Bank had supported and would continue to support activities related to cotton development within the context of country and regional priorities. The Bank provides support to cotton at all stages of the value chain through public, private and PPP frameworks, including efforts to improve productivity, marketing, processing and value addition as well as ensuring competitive and fair trade regimes. He concluded by noting that the decentralization of the Bank had increased opportunities for improved collaboration with stakeholders, and encouraged partners to contact the Bank's field offices on potential interventions. The ADB's report is a statement of the meeting.

The CHAIR thanked the representatives of international organizations for their statements and their work in the cotton sector. He invited HE Ambassador Ali Mchumo, the Managing Director of the Common Fund for Commodities (CFC), to report on the role of the CFC

in cotton development and CFC cooperation with ICAC.

Ambassador Mchumo thanked the organizing committee to invite him to participate in the meeting and making this statement. He noted that a handout with a portfolio of the activities funded by the CFC would be made available. He explained that the Fund was an autonomous intergovernmental financial institution established within the framework of the United Nations, with a partnership of 106 member states and nine intergovernmental organizations. The CFC's mandate is to enhance the socio-economic development of commodity producers and to contribute to the development of society as a whole. The CFC concentrates on commodity development projects, funded partly by its own resources. The focus of the CFC on commodities is explained by the strong dependence of the economies of many developing countries on commodity production and exports. The CFC activities focus on commodities instead of countries, and are of two categories: commodity development measures and commodity market development activities. The CFC focuses on low-cost, high-impact projects which have the potential of becoming self-sustainable and involves the private sector whenever possible. By May 2009, the Fund had approved 175 regular projects (with an average budget of US\$3 million and a duration of 2-5 years) and 120 Fast Track projects (small projects, with a maximum CFC contribution of US\$120,000). CFC projects are developed and submitted to the Fund by International Commodity Bodies (ICB). The ICAC is designated as the ICB for cotton and has worked efficiently and effectively in terms of developing project proposals, submitting them to the CFC and undertaking its supervisory activities. He noted that the CFC was pleased to work with the ICAC Secretariat. He noted that the current cotton portfolio contained ten ongoing or completed projects with a total value over US\$40 million, and ten Fast Track projects. He highlighted two projects that took place in India. He noted that the CFC was expecting the Executive Board of the Fund to approve two additional projects in October 2009, one regional project addressing the problem of contamination in seedcotton in Burkina Faso, Cote d'Ivoire and Mali, and one addressing the issue of low production efficiency of smallholder cotton growers in selected areas of Kenya and Mozambique. He noted that the CFC could count on substantial co-financing contributions from the European Commission for these two projects as well as for an ongoing projects, through its funding of the All ACP Agricultural Commodities Programme. He said that three priority fields relating to cotton had been identified and included in the Fund's indicative Programme of Interventions: 1) Sustainable Production Systems with a focus on the initial stages of the production/processing chain; 2) Diversification and Value-addition to cotton lint, including support for traditional and/

or novel by-products; and 3) Market Access, with a focus on meeting quality standards set by the international cotton processing industry. He noted that the issue of food security was also relevant to the mandate of the CFC, and that the Fund had financed various projects related to this issue in a number of countries. The Fund is in the process of developing a Trust Fund for Food Security, which will support CFC food security projects. He noted that cotton can contribute to "income security", which is key in ensuring access to food. He emphasized that cotton would remain an important component of the Fund's overall commodity project portfolio, and that the Fund would continue to work with the ICAC on developing new projects, in the hope that they will ultimately benefit smallholder producers who depend on cotton production for their livelihood. Ambassador Mchumo's report is a statement of the meeting.

The CHAIR thanked Ambassador Mchumo and invited Mr. Billy Morokolo, Acting Deputy Director General, Trade and Economic Development, Department of Agriculture, Forestry and Fisheries, South Africa.

Mr. Morokolo, delegate from SOUTH AFRICA thanked the ICAC for this opportunity to speak and welcomed all participants to Cape Town. He noted that the 68th Plenary Meeting of the ICAC took place in the midst of the global economic crisis. In addition, significant increases in the prices of food and agricultural inputs negatively impacted many countries. The South African cotton sector is going through difficult times, as cotton production and consumption are continuing to decline and cotton prices are also falling. He noted that government subsidies to cotton production in large producing countries had negatively affected cotton prices in recent years, and he deplored the fact that these subsidies maintained less efficient cotton production systems in these countries, while more efficient production systems were driven to an end because they were in countries not able to afford subsidies. The South African textile industry also suffers significantly, which results in the loss of many jobs. He said that South Africa believed that the ICAC would continue to strongly lobby for a conclusion of the Doha round, and noted that cotton was a unique development crop that displayed its ability to unite the world in its push towards fair trade, through the ICAC. He said that South Africa believed that substantial progress in agriculture was the key to the Doha Round, and that he hoped it would lead to reductions in trade distorting domestic subsidies in developed countries. South Africa supports an early conclusion of the Doha Round but cautions against an unrealistic timetable without consideration for the content of the round. He said that South Africa would continue to support the ICAC efforts to facilitate the speedy conclusion of the Doha round as a step towards promoting the role of cotton in economic development and

ensuring food security. South Africa's country report is a statement of the meeting.

The CHAIR thanked Mr. Morokolo and called for the statements of member countries.

The delegate of POLAND thanked the government of South Africa and the ICAC for their organization of the Plenary Meeting. He advised participants to refer to Poland's country report, which presents in detail the situation regarding the cotton industry in Poland in 2008. He noted that cotton consumption in Poland had continued to decline, faster, in the last quarter of 2008 as a result of the world financial crisis, imports of cheap cotton textile products, and difficulties for textile industries to acquire credits. In 2008, there was a sharp decline in cotton imports, consumption and production of cotton yarn. Only three spinning mills are still operating in Poland. The sharp drop in textile production continued in the first half of 2009. In 2008, cotton imports were mostly coming from Central Asia. He noted that the Gdynia Cotton Association organized the 10th International Cotton Conference on 3-4 September 2009, with the theme the "Attractiveness of Natural Fibers in Multi-Directional Applications." This event was part of the celebration of the International Year of Natural Fibers. Poland's country report is a statement of the meeting.

The delegate of ARGENTINA thanked the CHAIR and announced that his delegation had prepared documents that would be distributed (the country statement and two additional documents of general interest). He summarized Argentina's country report to the Plenary Meeting. The quality of the cotton harvested in Argentina was very good in recent years, but dropped in 2008/09. The cotton sector continues to work to improve productivity and sustainability of cotton production. He mentioned in particular the application of biotechnology and the use of narrow-row cultivation. He said that the textile industry had been growing rapidly between 2003 and 2008, thanks to large investments, and becoming the second growth sector after the automobile sector, but it was affected by the world economic crisis and imports of low-priced textile products from Asia. He said that they were expecting an increase in cotton area in 2009/10, but that the extent of this increase would depend on weather conditions in the next few months. Argentina's country report is a statement of the meeting.

The delegate of PAKISTAN thanked the government of South Africa for their hospitality and the excellent arrangements for the Plenary Meeting. He noted that Pakistan, as the fourth largest cotton producer, had a vital interest in this commodity. Cotton accounts for almost 2% of Pakistan's GDP. A cotton area of 3.2 million hectares was expected in 2009/10 with a projected production over 14 million bales. The textile industry in Pakistan is very competitive. He noted that the cotton sector in Pakistan was

working on several initiatives to increase cotton yields, including the introduction of certified seeds, balanced use of fertilizers and pesticides, the improvement of the classing system and efforts to introduce biotech cotton. They plan to increase cotton area in the future. He concluded by emphasizing the need for a level-playing field in the world cotton market and therefore the need to increase efforts to conclude the DDA negotiations. He also warned against the temptation for governments of adopting protectionist measures. He strongly recommended the establishment of an international research center for cotton, and said that his country was willing to help with this proposal. Pakistan's country report is a statement of the meeting.

The delegate of AUSTRALIA thanked the CHAIR for this opportunity to speak. He noted that the Australian cotton industry continued to operate under difficult circumstances. Production was expected to increase to 427,000 tons in 2009/10, reflecting improved irrigation water availability, but would remain lower than its 2001 peak of 825,000 tons. A persistent drought, climate change and the global financial crisis continue to affect cotton production in Australia. The Australian cotton industry has strong research and development capabilities that developed improved varieties and management of water, nutrition and crop rotation, allowing yield increases in recent years. He said that to respond to climate change, Australia would implement a Carbon Pollution Reduction Scheme. Agriculture will remain outside of this scheme until 2015, but the government has implemented initiatives that will help reduce carbon pollution and assist farmers to adapt to a changing climate. The government is also exploring the potential to open new areas for agriculture in the north of the country, where water is in larger supply. Australian governments are in the process of developing a water market where irrigation water entitlements can be traded, in order to improve water efficiently. The Australian government has also started a program called "Water for the Future", which will affect all uses of water. He noted that Australia believed that five issues should be addressed by ICAC and its members in order to achieve more profitable and sustainable cotton production. 1) Australia reinforces the need for a more transparent and fair trading environment. Australia continues to support a successful outcome to the Doha round and encourages ICAC to lobby member governments to fully commit to this process. 2) Australia applauds the work of the CSITC and encourages the continuation of this work, with if possible an extension to measure maturity, neps and other characteristics. Australia also suggests that ICAC consider the need to harmonize the way environmental production practices are described and they way labels are applied to cotton products. 3) Australia encourages all member governments to build robust domestic financial and governance institutions that will

support the global cotton trading system. 4) Australia applauds the ICAC for the creation of the "Research of the Year" award and urges member countries to maintain their research and development efforts and support the next World Cotton Research Conference in India. 5) The Australian cotton industry is re-engaging with the IFCP and supports its work. He thanked the South African government and the city of Cape Town for hosting the 68th ICAC Plenary Meeting. Australia's country report is a statement of the meeting.

The CHAIR adjourned the meeting at 10:35 am.

11:05 hr. Wednesday September 9, 2009

Dr. Eugene Brock in the Chair

The CHAIR called the meeting to order. He called for statements by delegates from member countries.

The delegate of CHINA (TAIWAN) expressed, on behalf of his delegation, his deep appreciation to the government of South Africa and to the ICAC Secretariat for organizing this meeting. He noted that China (Taiwan) imports all its cotton needs, which have been declining steadily since 2000. The United States is their largest supplier of cotton. He noted that the textile industry is one of the most important industries in the country, with 4,300 textile manufacturers and related companies, and 176,000 employees, accounting for a total production value of US\$13.76 billion in 2008. The textile industry has shrunk in the last ten years. The global economic crisis is expected to weaken the industry further. Therefore they have to dedicate their efforts to research and development, innovation, design, etc. China (Taiwan) is pleased to be a member of the ICAC since 1963 and it plays an active role in the Committee. The government of China (Taiwan) gave \$10,000 to SEEP in 2007 and again in 2009. The Taiwanese Textile Federation also helped the ICAC to organize a conference in their country in 2008. They are willing to share their experience in cotton processing with all the committee members. China (Taiwan)'s country report is a statement of the meeting.

The delegate of COTE D'IVOIRE thanked the Chair, the ICAC Secretariat and the government of South Africa. He noted that the cotton sector of Cote d'Ivoire experienced many difficulties due to civil war. Cotton production decreased dramatically after the war and is only starting to recover now. Cotton production in 2009/10 is expected to be significantly higher than last season. This recovery is encouraged by the end of the war and the return of families to their farms. The government of Cote d'Ivoire has developed an action plan for the cotton sector, including six areas of work: 1) the revision of the seedcotton price setting system; 2) production and distribution of cotton seeds; 3) the reinforcement of capacities of the producer organizations; 4) the reorganization of the fiber classing system;

5) the provision of credit for inputs; and 6) the reorganization of the inter-professional linkages in the cotton sector. He concluded by saying that cotton and cashew nut remain the only two agricultural products that can be used for the redevelopment of the northern part of the country. International cooperation (including support from UNCTAD) will be helpful for this redevelopment. Cote d'Ivoire's country report is a statement of the meeting.

The delegate of SUDAN thanked the ICAC and the Chair for this opportunity to give this address. He also thanked the government of South Africa for hosting the meeting. He explained that changes in laws and regulations intended to encourage growth in the agricultural sector and increase farmers' welfare, in particular by giving farmers freedom of choice regarding crops and cultivation methods, resulted in a significant decline in cotton yields and area. A national strategy for the revival of agriculture will rectify this by providing a more favorable environment for agriculture. They have great hope of reinstating cotton in its previous place in Sudan's economy. Sudan's country report is a statement of the meeting.

The delegate of TURKEY noted that Turkey was heavily affected by the global economic crisis because it is open to global trade. The textile and apparel sector was particularly impacted. Textile and apparel exports declined significantly, thus reducing demand for cotton in Turkey. There are signals that the economic crisis is diminishing and he is hopeful for the future. Due to better weather than last year, cotton yields could improve in 2009/10. Cotton consumption is expected to reach 1 million tons, about the same level as last year. He noted that a program to share Turkey's experience in cotton processing would be organized in Izmir at the end of September 2009 in coordination with the ITC, with participation from six West African countries. A similar program was organized last year for East African countries. Turkey's country report is a statement of the meeting.

The delegate of the UNITED STATES said that they had already submitted a detailed country statement. He noted that a substantial portion of the support to US cotton production was now decoupled from current production decisions, and had therefore a less distorting impact. The decoupling of much of US cotton support resulted in a contraction in US cotton area and production in the last few years. US exports are expected to decline by 20% in 2009/10, therefore decreasing the US role in the world cotton market. He noted that President Obama and his G-8 colleagues announced a global partnership to respond to global hunger needs. The US commitment to this initiative is expected to be \$3.5 billion over three years. He said he had already talked in the previous day of the West African Cotton Improvement Program developed by the US and the US contribution to the Millennium

Challenge Program in Africa. He thanked and congratulated the government of South Africa for hosting the 68th Plenary Meeting of the ICAC. The USA's country report is a statement of the meeting.

The delegate of EGYPT said it was an honor for him to address this international forum on behalf of Egypt. He thanked the government of South Africa for their welcome. He also thanked the ICAC staff, the interpreters and all those involved in the organization of the Plenary Meeting. He expressed the deep appreciation of his delegation to attend the meeting, and the interest Egypt is taking in the discussions. He noted that Egypt is developing technologies to produce cotton of great quality to fulfill local and international demand. Egypt is also keen on using IPM to produce environmentally friendly cotton. Egypt supports complete liberalization of cotton cultivation, handling, and price determination. Cotton area and production fell sharply in 2008/09. Cotton area continued to decline in 2009/10 and production is forecast at 100,000 tons, the smallest in over 150 years. The decline in cotton production is the result of lower cotton prices, more attractive competing crop prices, and an increase in the cost of inputs. Egypt encourages foreign investment in its textile industry. He added that products bearing the Egyptian cotton logo would be promoted, regulated and supervised. Egypt's country report is a statement of the meeting.

The delegate of KAZAKHSTAN expressed, on behalf of his country, a deep appreciation to the South African government for hosting the meeting and to the ICAC Secretariat and the interpreters. He expressed the hope that the work of the ICAC would go a long way to improve the world cotton economy. The government of Kazakhstan pays attention to the development of its cotton sector. Recently, nine new cotton varieties were developed and are now planted on 70% of cotton area. However, the world economic and financial crisis has severely affected the cotton sector of Kazakhstan and cotton area has declined. Lack of irrigation water, due to the deficit in rains, also contributed to the decline in cotton area, and the delays in planting will imply a later harvest than usual. They are trying to develop water saving measures. The new law adopted to support cotton farmers has already brought some fruits. Government support helps to mitigate the problems experienced by the cotton sector in Kazakhstan. The delegate wished to all countries to overcome their economic difficulties and to the South African government to organize the 2010 World Soccer Cup successfully. Kazakhstan's country report is a statement of the meeting.

The delegate of UGANDA thanked the government of South Africa for hosting the 68th ICAC Plenary Meeting and the ICAC team and the support staff. She reported that cotton area and production had improved significantly in Uganda in 2008/09, owing to the availability of cotton production inputs, made possible by the government after the collapse in the ginners' support system. Favorable weather also contributed to this recovery. She said it was a testimony that small-scale farmers in Africa cannot produce cotton unless assisted. Organic cotton production declined due to low yields in the previous season. The Ugandan government will soon develop a policy for organic agricultural production, which will also apply to cotton. The global economic crisis coincided with harvest time in Uganda, causing a drop in cotton prices. As a result the government had to intervene with a price support fund in order to pay reasonable seedcotton prices to farmers. Around 95% of cotton production in Uganda is exported. The government of Uganda is developing a strategy to enhance value addition in the cotton sector. The quality of the cotton produced in 2008/09 was improved. The outlook for cotton production in 2009/10 is not as good, because drought conditions at planting time affected cotton area. Estimates of 2009/10 cotton production will be available by October 2009. The cotton sector of Uganda continues to experience challenges related to the establishment of a sustainable input provision system, provision of cotton extension services, erratic rainfall patterns and fluctuating cotton prices. Most of these challenges are addressed by the government under several programs. The government of Uganda continues to support cotton due to its importance in poverty reduction. Uganda's country report is a statement of the meeting.

The CHAIR thanked Member governments for their statements and invited non-member governments to speak to the Committee.

The government of Mozambique thanked the Chair and the ICAC for this opportunity to make a statement. He said it was an honor and a privilege to address the 68th Plenary Meeting of the ICAC. Cotton is an important crop for the economy of Mozambique, and is especially important for rural communities, ensuring cash incomes and contributing to food security. This is why cotton stands amongst the six national priority crops in the government response to the food crisis, the Action Plan for Food Production in Mozambique (PAPA). Cotton production has stagnated around 80,000 tons of seedcotton in the last five years, but a number of actions are underway to increase it. A number of obstacles to cotton development were identified and ex-

perts are involved in efforts towards solution or minimization of their impacts. Priority areas of actions have been agreed upon and specific actors will lead to positive changes. He announced that Mozambique had decided to join the world cotton family through the ICAC. He said he was sure that an official request would reach the ICAC Secretariat during 2009. He reported on their happiness at this decision being taken during the IYNF and the 70th anniversary of the ICAC. He added that Mozambique had taken seriously the recommendations emerging from ICAC panels and that as a result they were taking the following steps: 1) revamping the research and seed system; 2) introducing instrument testing of cotton; 3) launching mass training of farmers in integrated cotton management; 4) exploring better market opportunities; and 5) addressing weather and market risks and uncertainties facing the industry. He said that Mozambique hoped to learn from the experience of ICAC member countries and from the work of the ICAC. He said that they were aspiring for the WTO negotiations to conclude by the elimination of production and export support to cotton, and to increase market access. They also hope for technical and financial assistance to improve their productivity and enhance the competitiveness of their cotton. They welcomed the recent positive news regarding the re-energizing of the Doha Development Agenda discussion. Mozambique's country report is a statement of the meeting.

The delegate of Tajikistan expressed, on behalf of the Tajikistan delegation, his gratitude to the ICAC Secretariat. He said they were grateful to take part in a Plenary Meeting of the ICAC for the first time. He also expressed his gratitude to the government of South Africa and Cotton SA for organizing this conference. Their delegation learned a lot about the world cotton economy and other topics during this meeting. This information is very important for their cotton sector. He hopes to be able to use this information to convince the government of Tajikistan to join the ICAC. Tajikistan used to produce 1 million tons of seedcotton, but production has declined significantly. The government adopted a program to increase production to 750,000 tons of seedcotton. With help from the ICAC, they hope they will be able to achieve this goal. He noted that today was Tajikistan's Independence Day. Tajikistan's country report is a statement of the meeting.

The CHAIR thanked the delegate of Tajikistan and said he was looking forward to their membership next year.

The CHAIR adjourned the meeting at 12:00 pm.

# First Open Session

## *Policies to Enhance Food Security*

11:30 hr. Monday, September 7, 2009

Mr. Andile Hawes in the Chair

Mr. Hawes highlighted from the previous session the need to have best practices, viable business and strong entrepreneurship for the future of the cotton industry and invited the speakers to deliver their presentations.

Mr. Anupam Barik, Director of the Directorate of Cotton Development, Ministry of Agriculture, India, explained the impact of the Technology Mission on Cotton (TMC) on small farmers in India, with a special reference to Bt cotton. Mr. Barik underscored the strategic relevance of the cotton and textile sectors to the Indian economy: cotton production engages 6.4 million farmers with an average planted area of 1.5 hectares, representing 30% of world cotton area and 25% of world cotton production; 60 million livelihoods depend on the cotton and textile sectors; the textile industry generates 4% of the gross domestic product and 17% of export earnings, and employs 20% of the total work force. In 2000/01, the average cotton yield in India was about half of the world average yield, affected by high pest incidence, inadequate technology transfer, low input use, poor fiber quality and fiber contamination. In February 2000, the Ministry of Agriculture launched the TMC, with the goal of generating improved genotypes and newer technologies, increasing the net income of cotton growers, reducing costs of cultivation, increasing yields, improving the technology dissemination process, improving cotton quality, reducing cotton lint contamination and upgrading ginning and pressing factories. The TMC was structured into four Mini-Missions (MM): the MM1 focused on research and technology generation, MM2 on technological transfer, MM3 on improving the marketing infrastructure, and MM4 on modernizing of ginning and pressing factories. The output of MM1 was (a) the development of long staple desi cotton, cytoplasmic genic male sterility and genetic male sterility systems in cotton, high quality barbadense genotype suitable for machine picking, and Bt cotton; (b) the development of integrated nutrient management and integrated weed management guidelines, commercialization of bio-pesticides and diagnostic kits; (c) the development of guidelines for quality evaluation and value addition; (d) the completion of an impact assessment report on productivity and social dynamics of cotton production. The output of MM2 was (a) an increase in the area under irrigation, the establishment of 33 insecticide resistance management labs, a 62% reduction in insecticide use, an additional income of US\$170 per hectare for 48,144 farmers, representing

a 33% increase in net profits, a reduction in pyrethroids resistance, the development of Bt detection kits and insecticide quality testing kits; (b) the development of a web-based national information system on pest management, collecting information from 240 villages in 9 states; (c) 500,000 farmers trained in farmer field schools; (d) increased mechanization; (e) successful trial of technical and economic feasibility of preparation of particle boards from cotton stalks; (f) increasing adoption of Bt hybrids (from 0.4% of Indian cotton area in 2002/03 to 73% in 2008/09; the number of released Bt hybrids in 2008 was 274: 180 Bollgard I and 94 Bollgard II), resulting in a 50% decline in the number of pesticide sprays and a 54% increase in yields, on average, which generated profit increases between 50% and 70% and net benefits of US\$225 per hectare; (g) change in species composition, from short staple to medium, long and extra-long staple cotton. The output of the MM3 was a 3% to 7% reduction in contamination and an improvement in the cotton procurement process and timeliness of the payments. The output of MM4 was a replacement of old ginning and pressing factories, a reduction in labor in the modernized factories, introduction of cotton cleaning machines and the establishment of composite units of ginning and bail pressing that resulted in a 1% to 7% reduction in trash content and improved overall fiber quality. The TMC brought a revolution to the Indian cotton sector, and biotech cotton represents a major breakthrough in cotton history. The major future challenges are the increased population of minor pests (mealy bug, mirid bug, spodoptera, etc.), emerging biotic and abiotic problems on Bt hybrids (leaf reddening, micronutrient deficiencies, wilting, gray mildew, etc.), and changes in species composition.

Mr. Barik was asked for clarification about the training process in the farmer field schools. Mr. Barik explained that the United Nations' Food and Agriculture Organization (FAO) prepared master trainers between 2001 and 2004. Those master trainers, in turn, trained 4,000 agricultural extension officials nominated by the states' Department of Agriculture in 9 states for 120 days. Finally, each of those trained facilitators organized 4 farmer field schools.

The delegate of PAKISTAN asked whether there has been any study documenting the relationship between increased productivity in cotton and poverty reduction in India. Mr. Barik responded that each MM conducted impact assessments, but the government of India has assigned a socio-economic study of the TMC to a private consulting group and the final report is expected within the next 6 months. Mr. Barik added that

farmers became more confident in cotton and that their socio-economic status has improved after the TMC.

The delegate of ZIMBABWE requested clarification about the funding of the training programs. Mr. Barik said that training programs were completely supported with public funds at a rate of US\$ 20,500 per training program, totaling US\$ 6.5 million (35 training programs in each of the 9 areas).

The delegate of COLOMBIA asked about the approximate total cost of the whole project in terms of the gross domestic product generated by cotton production in India. Mr. Barik answered that the budget for the MM1 and MM2 amounted to US\$82,000 and US\$2.5 million per year, respectively; and the MM3 and MM4 requested a onetime investment of US\$8.2 million. The MM1 was 100% financed by the national government. The MM2 was funded 75% by the national government and 25% by state governments. The MM3 and MM4 were funded 60% by the national government and 40% by the private sector (beneficiaries of the modernization). The total cost of the TMC represented less than 1% of the total national agricultural budget. Mr. Barik's presentation is a statement of the meeting.

The second presenter, Mr. Micha Powon, CEO of the Cotton Development Authority (CODA) of Kenya, focused on the role of cotton in ensuring food security in Kenya. Cotton was identified as a key industry to contribute towards food security and sustainable economic growth in the Government Strategic Plan for 2030, since (a) cotton can grow in marginal areas (80% of the country) where 27% of the population lives, with a potential to benefit 10 million people, (b) cotton has a long value chain, and (c) it is a good source of foreign exchange. The challenges to be faced by the government are the lack of financing to the cotton industry, poor access to affordable inputs and markets, the unavailability of biotech seeds for commercialization, the weakness of current linkages with East and West African countries and the lack of irrigation. Between 2004 and 2008, the Kenyan government enacted several reforms tending to facilitate the development of the cotton sector, such as the National Seed Industry Policy and Seeds and Plants Varieties (Amendment) Bill, the National Biotechnology Development Policy and Biosafety Act, the development of the National Agricultural Sector Extension Policy, and the Cotton (Amendment) Act to promote and coordinate the industry in a liberalized market environment. Mr. Powon concluded that the government should nurture solid public-private partnerships and provide incentives at all levels

of the cotton chain to make it profitable. Mr. Powon defined marginal lands as semi-arid lands with rainfall of 500-800 millimeters per year, indicating that three-quarters of Kenyan lands are marginal areas. Mr. Powon's presentation is a statement of the meeting.

Mr. Luis Alberto Pellegrino, Advisor, Secretary of Agriculture, Livestock, Fisheries and Food of Argentina, presented the role of cotton in the economy of the Northern region of Argentina. Mr. Pellegrino indicated that cotton production in the region, besides being strategic for the development of rural areas, would be competitive if market distortions in the world cotton market were eliminated. Government research indicates that for every US\$ 1 increase in the added value of raw cotton, the geographic gross product (GGP) increases, on average, US\$ 2.1; and for every US\$1 increase in the added value of cotton lint, the GGP increases, on average, US\$ 6.51. However, between 1999/00 and 2008/09, cotton area declined by 63% (from 811,000 hectares to 300,000 hectares), the number of cotton farmers declined by 47% (from 36,000 to 19,000 farmers), and the number of jobs in the value chain from the farm to the delivery of the bale to the spinning mill declined by 63%. Several programs have been implemented by the national and state governments of Argentina to improve the sustainability of the cotton sector, such as the development of new technology for narrow row planting, research on genes to control the boll weevil and many extension programs, among others. Similarly, other projects have been undertaken by public-private partnerships to mitigate the effects of the boll weevil. However, Mr. Pellegrino noted that these efforts will not suffice to reactivate the Argentine cotton sector unless (a) developed countries and big cotton producing countries stop taking measures that distort the world cotton economy, (b) new regulation is issued to limit speculative positions in the Intercontinental Exchange (ICE), and (c) competitiveness in the cotton trading sector is enhanced. Mr. Pellegrino noted that the Chair of the Standing Committee mentioned during the Inaugural Session that world subsidies rose from US\$ 2.7 billion in 2007/08 to US\$ 5.9 billion in 2008/09, and that the average subsidy per pound increased from 8 US cents in 2007/08 to 13 US cents in 2008/09. The average subsidy per ton amounted to US\$ 286 in 2008/09, equivalent to the average revenue received by Argentine cotton farmers per ton of raw cotton during that season. If the cotton sector cannot be reactivated, then cotton will have no role in improving food security in Argentina.

Mr. Peter Komane, a farmer from the Limpopo province of South Africa, asked Mr. Pellegrino which actions are being undertaken to improve the awareness in developing and developed countries about the impact of subsidies on the livelihoods of poor cotton farmers in developing countries. Mr. Pellegrino indicated that

current efforts to publicize the negative effects of subsidies are not enough, and that the great efforts undergone by developing countries to improve efficiency, research, and infrastructure are offset by the negative impact of subsidies in developed countries. Therefore, those subsidies constitute a barrier to food security in developing countries.

Mr. Abdoulaye Dia, Cotton Program Manager of Oxfam Mali, presented the results of a study conducted in collaboration with Oxfam America and the related policy recommendations. The food crisis stemming from the increase in cereal prices had severe effects at sub-regional levels in Mali. Additionally, in the areas where cotton is grown, the crisis in the cotton sector (price decline, absence of extension and services for cotton producers) deteriorated further the local socio-economic environment. According to Mr. Dia, cash obtained from cotton sales is not used to pay for food but to pay for school and health fees and to buy inputs for production of other crops. Mr. Dia believes that this crisis represents an opportunity to diversify cash revenue sources and implement communal or national food security stocks. The policy recommendations are based on the vision that West African farmers should feed their rural and urban populations. According to Mr. Dia, 95% of food in the cities is currently imported at very low prices from Asia. Governments are advised to set up an enabling environment for West African small farmers' competitiveness and access to domestic and regional markets, through: (a) effective public and donors support for access to animal traction equipment for all, (b) promoting formal contracting through value chains, (c) providing public extension services to –among other things– train farmers to intercrop, (d) promoting small farmers' access to credit and inputs, (e) using lessons from previous experiences in the cotton sector to implement these policies.

The delegate of ARGENTINA asked Mr. Dia's opinion on the results of the privatization of gins in West African countries recommended by the World Bank. Mr. Dia explained that results vary across countries and depend on how the process was implemented; but he agreed on the need at the time privatization was recommended to improve the quality of management in gins, and that privatization was a reasonable way to do it. The main problem where results are negative is the lack of integration of the food security dimension into the privatization process. Mr. Dia insisted that there is a need to re-focus on development rather than on business development. Mr. Dia's presentation is a statement of the meeting.

Mr. Rene Kossa, Director of Cotton Exports, Ministry of Agriculture of Cote d'Ivoire, indicated that ginning has deteriorated significantly in Cote d'Ivoire and Burkina Faso as a result of the privatization imposed by the World Bank and the International Monetary Fund. In West Africa, state monopolies were transformed into

private monopolies according to Mr. Kossa. Mr. Dia insisted that privatization results were mixed: some countries dismantled the existing input financing system and the results are negative; and in other countries there was no private sector company interested in the business. In the latter cases there is a need for regulation. Mr. Dia reminded the audience about the unfavorable environment in which privatization occurred: a strong euro resulted in higher costs and lower cotton prices, and strong world subsidies maintained cotton prices low. Mr. Dia cited Senegal as a success story: the ginning sector was privatized in 2003, and a business plan was developed for 2004-2008 (in which Oxfam was involved) that kept the cotton value chain integrated, linking small producers to the market, and provided cotton producers with opportunities in maize production. Mr. Dia concluded that privatization is not bad per se, and the results depend on how it is implemented, although he noted the contradiction of the World Bank to first dismantle the agricultural sector and recently declare it a priority for development.

The delegate of TANZANIA commented that due to the fall of cotton prices and the increase in cereal prices, local farmers switched away from cotton production into cereals production, and that while Kenya experienced food shortages, Tanzania experienced excess supply of food. However, the government of Tanzania prohibited the commercialization of the excess food stocks with Kenya and noted that farmers often face difficult choices. The delegate from Tanzania asked Mr. Dia for policy guidance on how to enhance cotton production. Mr. Dia indicated that cotton should not compete with food crops, and that crop rotations should be encouraged. In that sense, governments should help farmers to source their inputs and teach them to diversify their production. Mr. Dia highlighted the importance of new technologies and an enabling environment.

The delegate of COTE D'IVOIRE commented about the existence of a link between cotton and food crops through subsidized fertilizer: some of the subsidized fertilizer intended for cotton production end up being used in other crops. In that sense, cotton farmers are more food secure than non-cotton farmers. The delegate concluded that cotton is a social crop in African countries, and not an industrial crop. And since governments do not provide access to infrastructure and markets, the private sector should undertake that role. Mr. Dia responded that the private sector will not pay for infrastructure and services if it cannot benefit from it. However, he agrees that those are tasks that need to be completed. The way forwards is to integrate crops, manage the timing of planting and harvesting and promote an integrated system of production.

The delegate of BRAZIL requested the ICAC Secretariat conduct a study of the sustainability of cotton.

The delegate of MALI indicated that although cotton is a pillar of the Malian economy and it has a very high multiplier effect, the government is not allowed to invest in the cotton sector because it had been privatized. The recommendation of the delegate of Mali is to allow the government to cover the annual deficits of the privatized companies (CFA Francs 20 billion). Mr. Dia agrees that the benefits would outweigh the costs of that intervention, and farmers could benefit from it.

The delegate of ZAMBIA suggested that the focus should be moved away from input subsidization to improved research and development to improve yields.

Ms. Sarah Gavian, Chief of Party of the West African Cotton Improvement Program (WACIP), requested that the discussion be framed in terms of the title theme of this Plenary Meeting, the

role of cotton in economic development and ensuring food security. An internationally accepted definition of food security should be adopted in first place and then rigorously trace the mechanisms through which cotton increases or decreases food security. According to the FAO, "food security exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food which meets their dietary needs and food preferences for an active and healthy life. Food insecurity exists when people do not have adequate physical, social or economic access to food as defined above." The discussion should be addressed in terms of 'availability', 'access', 'utilization', and 'risk' of losing the existing levels of availability, access and utilization. Ms. Gavian also posed the question of how to invest in cotton – both publically and privately – in ways that promote the agricultural diversification needed to ensure

food security and economic growth.

The delegate of ARGENTINA commented that since the results of privatization in West Africa were dissimilar across states and the ICAC supported the privatization initiative in first place, the ICAC should be more careful in the future to avoid generalizations in its statements. The delegate also highlighted the importance of adopting a specific definition of food security.

The delegate of SWITZERLAND was introduced to announce that a convention on Organic and Fair Trade Cotton will be held on 21-25 September 2009 in Switzerland, and the convention is intended to be a platform to discuss value chain approaches, marketing aspects and business models.

The CHAIR adjourned the First Open Session at 1:45 pm.

## Second Open Session

### *Facilitating Small-Holder Cotton Production*

15:00 hr. Monday, September 7, 2009

Mr. Ibrahim Naibbi in the Chair

The CHAIR introduced Mr. Happymore Mapara of Zimbabwe. Mr. Mapara stated that about 300,000 families are involved in cotton production and with six members in each family on average, 1.8 million people were directly impacted by cotton production in his country. On average each cotton grower owns two hectares, and the average yield is 600-700 kg/ha of seedcotton as against 1,000 in 2001. The major challenges faced by cotton growers in Zimbabwe are access to credit, access to inputs, lack of efficient extension services, volatility in the market, transportation of produce, lack of supply nets against big players and weaker government support, thus forcing farmers to confront situations directly. Zimbabwe adopted a number of measures to facilitate cotton production. The measures included registration of growers by ginners, adoption of group structures, group binding agreements, farmer binding agreements with ginners and input supply based on the field report. Mr. Mapara said that freelance buying is detrimental to cotton support and must be stopped. The Government of Zimbabwe has introduced a regulatory system to ensure a level field for companies and input supply to cotton growers.

Answering questions from the delegates of ISRAEL, Oxfam and PAKISTAN, Mr. Mapara stated that out of 25 ginners 10-12 are more active and scattered in concentrated cotton areas. Ginners themselves are encouraging grouping. Ginners have one price whether a grower is registered or not registered with a specific company.

Responding to a question from the delegate of COLOMBIA, Mr. Mapara explained that Zimbabwe has a national database of cotton growers and one can easily find out if a cotton grower is registered with a gin and if so with which ginning factory. Mr. Mapara replied to a question from ARGENTINA and said that farmers are paid inclusive of seed and the current price of cotton seed in Zimbabwe was US\$160-170/ton.

The delegate of SOUTH AFRICA asked whether landowners in Zimbabwe risk losing control of the land if they do not cultivate for some years. The delegate of SOUTH AFRICA, talking about the cotton situation in his country, informed participants that on the average a farmer has a land holding of 3.5 ha which is too small to be an economical unit. There are only five remaining ginners and they are struggling hard to survive. Mr. Mapara described the land reform system in Zimbabwe, which he said is now complete and shifted agricultural production from commercial cotton growers (95% in the past) to small growers. Regarding small land units, Mr. Mapara referred to grouping of farmers, which has worked well in Zimbabwe. Mr. Mapara's presentation is a statement of the meeting.

Syed Hassan Raza, a cotton grower from Pakistan emphasized the importance of cotton for his country before describing the challenges currently faced by the cotton industry in Pakistan. Cotton is grown in Pakistan under a harsh climate, and exotic varieties fail to compete against locally developed varieties. The National Biosafety Committee has recently allowed testing of biotech varieties but no biotech variety is officially approved yet. The two major pest

problems that have seriously affected cotton production in Pakistan are mealybug and cotton leaf curl virus. Unfortunately, effective control against both is not available yet and that is why production in Pakistan is significantly below its potential. Mr. Raza also linked low organic matter to low yields in Pakistan. Green manuring is not done and neither the crop residue from rice, wheat and even cotton is properly utilized. Though mostly delinted seed is used for planting, plant populations are around 35,000 plants/ha as against 55,000 plants/ha recommended by experts. Mr. Raza informed that in Pakistan there are two kinds of cotton growers i.e. progressive and general farmers. The progressive growers get an average yield of about 988 kg/ha lint as against 329 kg/ha by general growers. On the quality aspect Mr. Raza mentioned contamination in Pakistani cotton. He suggested to the world cotton community to have an international institute on cotton. He also made a number of recommendations for his fellow growers and for his government, which included development of virus-resistant varieties, adoption of biotech cotton, improve plant population and reduce contamination.

The delegates of TANZANIA and SOUTH AFRICA asked to which grower group he belonged and what were the limitations of general growers respectively. Mr. Raza considered himself to be a progressive grower and listed a lack of resources and an inability to use technology as limiting factors for general growers. On the cost and net income issue, Mr. Raza stated that on the average a farmer makes a net income of about US\$600/ha while his cost of production

is about US\$650/ha. Mr. Raza's presentation is a statement of the meeting.

Mr. Piriev Dzhalil of Tajikistan describing the cotton production system in his country stated that cotton growers are under heavy debt, about US\$700 million. Cotton production has declined from over a million tons of seed cotton to 350,000 to 400,000 tons recently. In order to revive the cotton sector and give a fresh start, the Government decided to pay off the foreign debt and freeze the local debt. Agricultural land has been transferred to cotton growers and they are allowed to use land as a security to borrow money from ginners. There are 18-20 medium size ginners who are helping cotton growers. Mr. Dzhalil added that there are about 30,000 farms, and farmers have to understand all aspects of cotton production including acquiring inputs, credit and technical knowhow. Mr. Dzhalil's report is a statement of the meeting.

The delegate of the USA explained that a number of factors have affected world grain prices, including a prolonged drought in Australia, USA and EU, rapid demand growth for grains, and a proliferation of export restrictions on wheat and rice.

Dr. Keshav Kranthi of India focused his presentation on the development of biotech gene detection, resistance detection in bollworms and quality assessment of insecticide kits. He gave background information that instigated researchers to develop different kinds of kits. Pirate seed of biotech varieties was already in the country when the Government of India approved biotech cotton for commercial production. There are about 497 hybrids approved for commercial production and it was not possible to check the quality of all varieties whether it had a biotech gene or not. India developed a simple easy to use dip strip kit to identify biotech cotton. The kit became popular and over one million kits have already been used in India, which helped to lower the percentage of pirate seed from about 69% in 2003/04 to about 5% in 2007/08. Now India has developed kits for all insect resistant biotech genes commercially approved in India. Regarding the bollworm resistant kit, Dr. Kranthi stated that it takes heavy investment up to US\$500 million to develop and commercialize an insecticide product but the bollworm

takes only five years to develop resistance to a particular insecticide. He gave an example that in some cases almost 99% of bollworm larvae survived when dipped in cypermethrin. Under such circumstances, farmers resort to higher doses and mixtures, which further deteriorates the situation. Adulterated insecticides are commonly marketed, and farmers have no way to check the quality of various insecticide products on the market. The resistance kit and insecticide quality control work was undertaken under a project sponsored by the Common Fund for Commodities. He thanked the Common Fund of Commodities and his collaborating partners in China, Pakistan and the UK and their national governments in sponsoring the joint work under the project.

The delegate of TANZANIA inquired about the duration for which the bollworm larvae were dipped in the insecticides. Dr. Kranthi stated that the larvae were dipped for only few seconds. At the end of the meeting the SECRETARY GENERAL announced that hard copies of the two publications on resistance and quality kits are available at registration for pick up. Mr. Kranthi's report is a statement of the meeting.

Mr. Vibhu Nath from Olam International Ltd., explained the overall approach of firms in the private sector to help growers produce cotton successfully. The three focal areas of activities of private companies are to provide extension services, ensure input supplies and provide for marketing of cotton at farmers' doorsteps. He described the cotton industry along with critical issues in Africa and separately in West Africa. Mr. Nath listed a number of issues including low productivity, price fluctuations, land locked geography thus making transportation expensive, lack of biotech cotton, and political instability in many countries, that are limiting cotton production in Africa. He added that it is difficult to say that privatization has failed because it is a complex issue and could be affected by many factors affecting not only yields but also income to cotton growers. Mr. Nath said that private as well as the government sectors are both important for a healthy and successful cotton production and marketing system. There are responsibilities that come exclusively under the government mandate and the same is true

for the private sector. But, some responsibilities are shared responsibilities where both partners have to work together. Examples could include research, storage, price fixation and support for cooperatives. Mr. Nath's presentation is a statement of the meeting.

The delegate of COTE D'IVOIRE welcomed the private sector in his country but stated that farmers pay for the services they receive from companies like Olam. He asked whether, when an investment is made in the cotton sector, is it for the purpose of economic development or food security? He observed that there might be a need to recommend that supporting input supplies in cotton could help improve the food security situation. He concluded that there is a need to analyze how cotton contributes to food security.

Responding to a question raised by the delegate of INDIA, Mr. Nath stated that high ginning out turn is factored into the price of seedcotton so farmers do benefit from a higher lint recovery.

Regarding asset accumulation, Mr. Nath noted that if farmers are able to own equipment, rather than rent, they could lower costs.

Mr. Nath replied in negative when a delegate of SOUTH AFRICA asked about direct partnership with farmers. He also said that the private sector is involved from production through marketing when a representative of the National Agriculture Marketing Council of SOUTH AFRICA asked a question about involvement with growers.

A representative of the USAID also supported the view that cotton is linked to food security.

A representative of Oxfam and the President of the African Cotton Producers Association joined others in supporting cotton as a strong component of food security, particularly in the form of seed for livestock and oil for human consumption.

The delegate of ARGENTINA asked what is food security? According to him it is availability and accessibility of food. He referred to earlier comments made by a representative of WACIP in the First Open Session and once again suggested to define food security.

The CHAIR declared the session closed at 6:00 pm.

## Third Open Session

### *Cotton By-Products and Value Addition*

9:00 hr. Tuesday, September 8, 2009

Mr. Ibrahim Malloum in the Chair

Dr. A.J. Shaikh, from the Central Institute for Research on Cotton Technology (CIRCOT) in India, made a presentation on the utilization of

cotton plant stalks in the production of particle boards. These boards can be used in the manufacture of furniture, wall paneling, floor and ceiling tiles, and interior walls. Cotton stalks are abundant and under-used in India. CIRCOT

has developed technologies to elaborate pulp and paper, composite boards, and corrugated boxes from cotton plant stalks, which contain high levels of lignin and cellulose. The main challenge for the utilization of cotton stalks was high procurement costs due to high collection and

transportation costs of the bulky stalks. The project "utilisation of cotton by-product for value added products", funded by the Common Fund for Commodities (CFC) (US\$ 918,000) and the government of India (US\$ 1,221,600) and supervised by the ICAC, started on September 2004 and will end in November 2009. The output of the project consists of (1) the development of a guideline to generate appropriate logistics for the entire value chain from the collection of stalks until the distribution of stalk chips to the factory, (2) the installation of a demonstration plant in Nagpur, (3) the standardization of manufacturing practices, (4) and the conclusion of a technical and economic feasibility assessment that concluded that the project is viable. The boards satisfy quality standards established by the Bureau of Indian Standards. The returns to investment in a 10-ton per day plant are estimated at 20%. The utilization of by-products of cotton is expected to result in additional income and employment opportunities for farmers. On November 9-11, 2009, India will host an international workshop on the results of this project at Nagpur. A request for extension of the project to Zambia was submitted to the CFC with the endorsement of the ICAC. Dr. Shaikh's report is a statement of the meeting.

The delegate of ARGENTINA requested clarification about the type of resins used in the production of the boards and their weather resistance attributes. Dr. Shaikh explained that boards are currently produced with formaldehyde, which allows for interior and exterior use of the board, but eco-friendly resins have already been developed to replace those resins. However, boards can only be used in interior applications when made with eco-friendly resins. He requested that the ICAC Secretariat present a request to extend the project to Argentina and Paraguay, paying particular attention to the potential synergies between the extraction of phenolic resins from a local hard wood tree that happens to grow in cotton producing areas (quebracho colorado) and the use of cotton stalks in the production of boards.

The CHAIR requested clarification about other ways to uproot the stalks, and consumer acceptance of the product. Dr. Shaikh explained that mechanical harvesting of stalks is under study but it has not yet been successful. He also indicated that, according to a recent market study, the product was well received by consumers.

Mr. Mans Lanting from India asked about the trade-off between using stalks as compost for incorporating organic matter into the soil and selling stalks as chips. Dr. Shaikh indicated that he does not recommend the use of stalks as compost, since they are not easily decomposable due to their high proportion of lignin and because stalks carry pests. Furthermore, producers can sell stalks for US\$22 per hectare and buy organic matter for US\$10 per hectare.

A South African participant requested more information about the involvement of farmers in the project, the benefits accrued for the farmers, and how the transition from the experimental stage to a full scale project owned by farmers will be dealt with in the future. Dr. Shaikh explained that benefits to farmers amount to about US\$10 per hectare, that if a chipping company is established near the village then non-farm employment will be available, and that farmers will not own the project, since it is only for demonstration purposes. It was explained that the purpose of the project is to develop commercially viable methods of cotton stalk utilization, and that countries with an interest in implementation of the technology should access the full project documents from the ICAC, CFC and CIRCOT web sites.

The delegate of KENYA indicated that there is a shortage of wood supply in Kenya, and requested that CIRCOT consider Kenya as the next place to upscale their activities. Dr. Shaikh highlighted that the optimal scale is 10-15 tons per day capacity and the optimal location is rural villages, and that CIRCOT is willing to share the insights gained through the project with all countries.

The Chairman of the African Cotton Producers Association asked about the optimal distance between the cotton production area and the processing plant. Dr. Shaikh reported that the board-producing plant should be located within 50 kilometers of the cotton growing area, while the chipping center should be located within 5 kilometers of the cotton growing area.

A cotton breeder from Uganda thanked CIRCOT for providing a new safe way to dispose of stalks, and requested that the project be extended to East African cotton growing regions.

The second speaker, Mr. Célestine T. Tiendrebeogo, Managing Director of SOFITEX from Burkina Faso, focused on the value added by cotton production in Burkina Faso. Cotton production generates 30% of the gross domestic product (GDP) of Burkina Faso and 60% of export earnings, and 3 million livelihoods depend on the cotton sector. The proportion of value added by cotton production that goes into the hands of farmers amounts to 61% of the sales value. Cotton production affects food security in Burkina Faso: cotton producing areas represent 80% of the cereal surpluses. The availability of rural credit, equipment, access to inputs and high concentration of inputs and technology in areas where cotton is produced results in higher maize yields than in non-cotton producing areas. Cotton seeds are used in Burkina Faso for feeding cattle, soap production and human food. Fiber waste is used in manufacturing of packaging and composting organic fertilizers for other crops. Cotton plant stalks are used as compost and as binder in bricks in the construction of rural houses. Hulls are used to produce energy

and compost. The crushing industry creates 500 permanent jobs and 1,000 seasonal jobs. Mr. Tiendrebeogo indicated that in order to increase the profitability of the cotton sector, yields must increase, and that biotech cotton is the tool to reactivate the cotton sector in Burkina Faso. Commercialization of biotech cotton is already underway.

The delegate of BRAZIL indicated that the production of biodiesel in Matto Grosso has been a major contributor to the addition of value to the cotton sector: while all seeds were used as cattle feed in the past, nowadays cotton seeds are crushed and the oil is used in biodiesel production while the crushed seed is used as cattle feed.

The delegate of UGANDA requested clarification on the type of pests occurring in Burkina Faso and which varieties were used to introduce the biotech genes. Mr. Tiendrebeogo explained that local varieties were used in the production of biotech seeds and that Monsanto does not currently intervene in the provision of the genes; the National Research Institute of Burkina Faso is the institution in charge of the gene introduction. The speaker also indicated that the most common type of pests are the exocarpic caterpillar, the most dangerous being the helicoverpa and the spodoptera. Bollgard II controls these pests.

The representative of Oxfam requested further explanation on the competition between raw seed and oil, and the rate of spraying in commercial fields versus field experiments. He also commented that Oxfam believes that biotech technology is the way forward, but there is a need to develop a supporting environment with life science companies. Mr. Tiendrebeogo noted that competition between raw seeds and oil improves the value of seeds for farmers, and indicated that 62% of cottonseed is used for fertilizer in Burkina Faso. The speaker also noted that biotech cotton is useful for small and large scale farmers because it reduces spraying, and that Monsanto and Burkina Faso have a very good relationship.

The Director of Exports for the Ministry of Agriculture in Côte d'Ivoire thanked the speaker for presenting for the first time the cost structure of cotton production in Burkina Faso, but highlighted the importance of also analyzing the cost structure of ginners.

The delegate of Mozambique asked the presenter about the outlook for cottonseed demand after the introduction of biotech cotton. Mr. Tiendrebeogo explained that seed processing will evolve as a natural phenomenon and consumers will be able to choose between oil derived from biotech cottonseed and conventional cottonseed.

The third speaker, Dr. Sebahattin Gazanfer, Advisor, Joint Board, All Textiles and Raw Materials Exporters' Association of Turkey, discussed the evolution of cotton oil in Turkey over the last 5 marketing years. Oilseed production in

the world increased during this period, while cottonseed production declined. Cottonseed represents about 10% of all oilseeds, and ranks third in volume after soybean and rapeseed. World production of major vegetable oils increased over the period, while the production of cottonseed oil (representing about 5-6% of total production) remained stagnated. The amount of cottonseed oil traded is very small, less than 4% of world production. Between October 2008 and April 2009, vegetable oil prices increased

significantly, affected by increases in commodities futures prices and the fear of food shortages in 2008 that induced some governments to ban exports of vegetable oils. No futures market for cottonseed oil exists today due to the lack of traders, stockholders and consumers. Turkey has a large deficit in crude vegetable oils, despite producing sunflower seed, soybean, cottonseed, hazelnut and olive oil. Turkey is an important refiner of vegetable oils, and a large exporter of refined/packaged vegetable oils. In particular,

Turkey is a large exporter of margarine, which is produced with 80% cottonseed oil. New lines of products, such as the margarine for breakfast, are being developed to improve value aggregation to the cotton sector. Mr. Gazanfer's presentation is a statement of the meeting.

The CHAIR thanked the speakers for their presentations. Seeing no further discussion, the Chair adjourned the session at 11:00 am.

## Fourth Open Session

### *Outlook for Supply, Demand and Prices of Cotton and Inputs*

11:00 hr. Tuesday September 8, 2009

Mr. M. Karaan in the Chair

The CHAIR introduced Mr. Hugo Pienaar, Bureau for Economic Research, University of Stellenbosch, to present a report on outlook for the world economy. Mr. Pienaar reported that the worst of the recession in world economy is behind us, but a protracted and muted recovery is projected. He noted that world economic indicators are improving, including Purchasing Managers Index (PMI), U.S. houses prices as well as leading indicators in UK, Japan, Europe and South Africa. Sentiment about the world economy is also improving, while stock markets are experiencing the sharpest rally ever in the context of pricing after a recession. However he cautioned that consumers, especially in the USA, remain under pressure despite the temporary huge fiscal stimulus, while the U.S. budget deficit is soaring and the jobless rate remains high. Chinese economy growth is crucial, but to compensate for the projected 2.5% decline in the U.S. economy in 2009, the Chinese economy would have to grow by 9.5%, which is unlikely. After an initial sharp recovery, the Chinese PMI has consolidated at higher levels. Mr. Pienaar noted that the IMF expects a return to positive growth in advanced economies during 2010, but growth will remain below potential and slow, while developing economies are expected to grow faster than developed countries.

The delegate of TURKEY asked why higher growth rates are projected for Sub-Saharan Africa.

Mr. Pienaar answered that with the expected recovery in demand for commodities (for example oil) produced in countries such as Nigeria, Angola and South Africa, prices could increase leading to increased production.

The delegate of CHINA (TAIWAN) asked Mr. Pienaar to comment on projections indicating a double-dip recession.

Mr. Pienaar said that this risk exists because stimulus packages will end soon leaving much uncertainty about the economy. Mr. Pienaar's presentation is a statement of the meeting.

The CHAIR introduced Mrs. Armelle Gruère and Dr. Alejandro Plastina to present a report from the Secretariat on the outlook for cotton supply and use. After declining significantly in 2008/09, both world cotton mill use and production are expected to stabilize in 2009/10. World cotton production is forecast slightly down at 23.3 million tons due to reduced area. As the world economy gradually stabilizes and economic prospects for 2010 improve in most parts of the world, global cotton mill use is expected to recover by a small amount to 23.6 million tons. World cotton imports are expected to rebound by 5% to 6.8 million tons in 2009/10, driven by increased demand. World ending stocks are forecast slightly lower, at 12.0 million tons.

The Secretariat reported that the world cotton market is experiencing increased concentration. In the last decade, production and spinning of cotton have continued to grow faster in Asia than in the rest of the world. In addition, in the last few years, trade in cotton became more concentrated amongst the largest merchants, and this trend will continue during 2009/10. Nevertheless, global cotton trade remains very competitive. The season-average Cotlook A Index experienced a significant drop in 2008/09, to 61 cents per pound, due to falling consumption. In addition, cotton prices were unusually volatile during 2008/09 due to the global economic crisis. The ICAC Price Model 2007 forecasts a 3% higher season-average Cotlook A Index in 2009/10, at 63 US cents/lb. The 95% confidence interval ranges from 55 US cents/lb to 73 US cents/lb.

The delegate of ARGENTINA commented that subsidies provided by USA, China (Mainland) and other countries present a problem for countries that do not provide subsidies and asked Mrs. Gruère if she has data on apparel trade by China (Mainland).

Mrs. Gruère answered that the WTO Secretariat reports on trade in textiles and apparel, and the ICAC Secretariat will gather information on these topics for future presentation. She said that it seems that apparel exports by China (Mainland) experienced robust growth during most of the current decade.

The delegate of ARGENTINA expressed concern about the effects of subsidies on cotton and apparel markets.

The delegate of ARGENTINA asked Mrs. Gruère if the increased concentration in the cotton market is leading to larger volumes traded by a smaller number of companies.

Mrs. Gruère answered that increased concentration has resulted in a smaller number of companies each trading a larger volume on average. She said that the ratio of volume traded by the largest companies to total world trade in cotton is rising.

The delegate of COLOMBIA asked Mrs. Gruère to comment on the decline in the rate of growth in adoption of biotechnology and the moderation in its large initial impact on yields, as experienced in India.

Mrs. Gruère said that in ten countries where the biotechnology was adopted widely, the expansion of the technology is slowing and it takes longer for other countries to adopt the technology. Mrs. Gruère and Dr. Plastina's report is a statement of the meeting.

The CHAIR introduced Mr. Andre Jooste of the National Agricultural Council (NAMC), South Africa, to present a report on input costs. Mr. Jooste reported that over the last couple of years several factors have evolved that affect demand, supply and trade in agricultural products. Some of these factors include changes in the availability of energy sources and the world economic and financial crises. He noted that fuel, chemicals and fertilizer continue to contribute significantly towards cotton production

costs. Mr. Jooste indicated that the Cotlook A Index declined significantly after a surge during 2007 and the early parts of 2008. On the other hand, fertilizer prices peaked during the latter part of 2008 and have not dropped to their original levels, leading to a price-cost squeeze for cotton producers that may persist for some time. He noted that the outlook for fertilizers is stable, meaning that demand is expected to match supply. He concluded that there will be limited supply flexibility if strong demand for fertilizers transpires over the next three to four years. Mr. Jooste's presentation is a statement of the meeting.

The CHAIR introduced Mr. Patrick Packnett, Assistant Deputy Administrator, Foreign Agricultural Service, Office of Global Analysis, USDA, to present USDA's outlook for grains and oilseeds for the 2009/10 marketing year. Mr. Packnett highlighted the relationship between supply, demand and prices of grains and oilseeds and those of cotton, indicating that market-oriented farm policies have caused this relationship to become more evident in recent years. Mr. Packnett reported that world wheat, corn and soybean area has grown at the expense of cotton, particularly in the United States. Grain and oilseed prices have doubled during the decade, and cotton prices have remained nearly unchanged.

Mr. Packnett presented the current USDA forecasts for production, consumption, trade, ending stocks and prices for wheat, corn, rice and soybeans. It was noted that world corn production is projected to increase in 2009/10 and roughly equal consumption. The U.S., which accounts for 40 percent of world production, is forecast to produce its second largest crop in history, while foreign production is projected to decline slightly. Higher consumption for ethanol production in the U.S. is being partly offset by less corn being used in feed. Livestock producers are using more distillers dried grain, a by-product of the ethanol process, and more feed quality wheat in place of corn in feed rations. The U.S. season average price is expected to fall 13 percent as prices continue to respond to larger stocks. The world wheat production forecast reflects another bumper harvest and will surpass consumption for the second straight year, which will help sustain adequate global stocks. Wheat prices continue to correct but remain above long-term averages. Rice production is forecast to fall below consumption in 2009/10 mainly due to monsoon related short falls in India's crop. However the forecast is for the second largest crop on record. Rice stocks will decline slightly in 2009/10 but will remain sufficient relative to global demand. Rice prices have fallen since their May 2008 peak but remain above historical levels. In 2008/09, soybean consumption growth slowed due to tight stocks and very high prices

following a shortfall in South American production. In 2009/10 global production is forecast to reach a new high supported by larger area and improved yields. This will allow consumption growth to continue. China accounts for over half of global imports, similar to the situation with cotton, and China has a large influence on market prices. China had large imports over the last 2 years and has built stocks. We expect the rate of growth of China's imports will slow in 2009/10. With the large rebound in global production expected in 2009/10, ending stocks will increase which should put some pressure on world prices. Soybean prices are expected to fall from the recent peak but will remain relatively high, especially until the outcome of the South American crop is more certain. The market is also concerned that the U.S. soybean crop is behind schedule in parts of Illinois and Indiana. Mr. Packnett concluded by forecasting abundant supplies of wheat, corn soybeans and rice. He said that there are strong demand trends in place for all commodities. Nevertheless, he expects that prices will ease but will not return to levels seen early in this decade.

The CHAIR adjourned the meeting at 1:30 pm.

*[The Fifth Open Session can be located under the Statement of the Meeting from the Committee on Cotton Production Research on page 10.]*

## Sixth Open Session

### *The Impacts of Social and Environmental Standards on Demand for Cotton and Textiles*

9:00 hr. Friday September 11, 2009  
Mrs. Ina Grohmann in the Chair

The CHAIR introduced Mr. Christopher Ward, representative of the Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP) to present a report on SEEP activities. Mr. Ward reported that since the last meeting in Ouagadougou, SEEP has held a number of teleconferences, has finished some of the data collection and is now in the process of closely reviewing this information, to be both critical and accurate in the reporting. He reported on a study on use of selected pesticides in cotton, with initial conclusions indicating that the average use of selected pesticides per ha of cotton has decreased from the peak values recorded in the 1990s in most of the selected countries. In 2006, the average use of the selected pesticides per hectare was significantly different across the countries ranging from 4.9 kg/ha to 0.6 kg/ha. Mr. Ward reported on issues related to production efficiency and energy use, noting that cotton yields have doubled since 1965, while harvested acres have remained relatively constant resulting

in a 50% decrease in the amount of land required to produce a kilogram of fiber. Water Use Efficiency (WUE) expressed as kilograms of output (fiber or seed cotton) per cubic meter of water for cotton production has also improved. He reported that Energy efficiency for cotton ranged from a high in the Southeastern United States to a low for non-mechanized farms in South America, with the high amount of variability in the production systems studied attributed to differences in yields and the use of irrigation. Mr. Ward reported that since last years presentation of the issue of Greenhouse Gas Emissions within the SEEP, major studies on the topic were published that help to quantify the various factors that contribute to the emission of greenhouse gases. Research indicates that cotton production has the potential to sequester carbon in its products (fiber, seed, even cotton stalks, if they are not used as fuel or just burned) and in the soil, if a range of corresponding farming measures is applied. He informed that the Secretariat is conducting a survey to identify the responsibilities and costs at the producer level associated with

labor used in cotton production. In May 2009, the Secretariat developed a template for information about labor practices in the cotton industry and asked 18 major cotton producing countries to provide information. As of end-August 2009, nine countries had responded: Australia, Brazil, Burkina Faso, Colombia, Egypt, Greece, Pakistan, South Africa and Sudan. An additional 5 countries indicated that responses would be provided in September and October 2009. He said that Information from the reports already received indicates a wide variance in labor conditions. Employers in some countries are responsible only for the payment of wages, and costs per kilogram of cotton production are fairly easily calculated. In contrast, in many countries, employers in the cotton industry are responsible for payment of wages, holiday pay, severance and retirement benefits, maternity and paternity leave, disability benefits, health care, transportation, housing, meals, education costs for the children of farm workers, and taxes for the benefit of government revenues and social insurance programs. Rates of pay and benefits

often vary within a country depending on region of production and local labor conditions. The standard work week ranges from 38 hours to 44 hours in the countries with defined limits, and a higher rate of pay for overtime is often mandatory. The standard work week is undefined in many countries, and labor costs are often based on the completion of agronomic activities, such as thinning and harvesting, rather than hours worked. He also reported that a review on the social issues relevant to cotton growing, and a literature review has been finalized, and is available on the ICAC website. The Report of SEEP is statement of the meeting.

The delegate of ARGENTINA asked if the volume of pesticide used is increasing around the world because of increasing pest pressure, pest resistance or rising area. Mr. Ward replied that the study did not analyze the growth in pesticide use but rather looked at efficiency of pesticide use and risks and hazards associated with it.

The delegate of ARGENTINA asked Mr. Ward to comment on boll weevil eradication efforts in Brazil. Mr. Ward replied that it is a difficult problem but good pest management practices are key in solving it.

The delegate of SUDAN asked why the use of insecticides in cotton production declined only from 20% of world insecticide use to 17%, despite widespread adoption of biotechnology in cotton. Mr. Ward replied that production of cotton is rising and the use of insecticides per kilogram of cotton is declining rapidly.

The delegate of BURKINA FASO asked about the long-term effects on human health associated with pesticide use. Mr. Ward replied that the SEEP did not study this issue, but obviously there must be some negative effects if the chemicals are used incorrectly. The key is education and training on proper use of chemicals.

The CHAIR introduced Mr. Jens Soth, coordinator for research and implementation activities, Helvetas Organic Cotton Center, Switzerland, to present a report on the impact of social and environmental standards on demand for cotton and textiles. Mr. Soth reported that there are many initiatives and standards that try to address the complex social and environmental issues of the textile supply-chain. He noted that the discussion about the availability of commodities versus food security has initiated a public debate, and there are strong factors that affect this debate, including global change of dietary habits – the shift towards meat based nutrition, increasing demand for luxury items like coffee and cocoa, loss of fertile soil, climate change and water scarcity. Mr. Soth observed that since discussions about sustainability of cotton production are more than two decades old, cotton has already achieved a lot of practical success in compliance with certain standards. He indicated that organic cotton has become a well-known and intensively discussed production system with

proven beneficial effects on poverty alleviation and conservation of natural resources, expanding rapidly over the last several years. Mr. Soth indicated that Fair-trade cotton is directly aimed at combating poverty and has created a completely different price-fixing system, and its beneficial impacts can best be accomplished if combined with organic. He said that two other approaches have been developed: Cotton made in Africa and the Better Cotton Initiative that are meant for the mass market and are intend to change local production conditions rapidly and have already proven effective on a remarkable scale in Zambia, Benin and Burkina Faso. Mr. Soth concluded by saying that environmental and social standards will not only be able to secure the market share of cotton, but they will even have a good potential to increase it. Mr. Soth's presentation is a statement of the meeting.

The CHAIR introduced Mr. Simon Ferrigno, director of The Organic Exchange to present a report on farmer self-assessment and Traceability to create a consumer understanding of the impacts of organic cotton production. Mr. Ferrigno discussed the role of social and environmental standards. He noted that social and environmental standards give consumers some understanding, and a guarantee, of what they are buying, but when standards are multiple, confusing, fragmented and do not apply to all aspects in all certificates, as is now the case in organic cotton (where the product may be 100% organic cotton, 70% organic cotton or Made with Organic Cotton Fiber or even 5% organic fiber), consumers become confused and producers do not receive uniform benefits. He said that the FLO Fair-trade mark succeeds because, irrespective of its real impacts, it delivers a clear and unequivocal consumer guarantee, and consumers understand its quite simple message: it guarantees a better deal for third world producers. Mr. Ferrigno indicated that organic certification is confused in its messages by comparison. He noted that the initial strength of organic certification was in building up a market, but that as it has grown, trust and understanding of its meaning has diminished. He described The Organic Exchange farmer self-assessment tool, and its contribution to understanding of real farm level impacts and integration into a transparency and traceability system that can restore understanding of a common definition of organic, and thus remove a barrier to further growth by contributing to a common consumer understanding of organic cotton. Mr. Ferrigno's presentation is a statement of the meeting.

The delegate of SOUTH AFRICA asked about the high cost of producing organic cotton associated with pest and disease control. Mr. Soth said that because of reduced input use, the cost of production of organic cotton could be 20-30% lower than conventional cotton, plus farmers benefit from higher prices they receive.

The delegate of MALI observed that farmers

in Mali were enthusiastic about producing organic cotton, however there are difficulties in selling organic cotton because of poor demand. Mr. Ferrigno acknowledged the problem with demand and suggested an improved system of governance to insure links between producers and buyers. Mr. Soth replied that the problem of oversupply of organic cotton was caused by the quick and positive response by many countries to organic cotton demand. Work on expanding demand is needed.

The delegate of BRAZIL asked Mr. Soth if he is against expanding the use of bio-fuels. Mr. Soth said that he is not opposed to the expansion of bio-fuels. Bio-fuels add pressure on agricultural use of land.

The delegate of KENYA asked what are the economics of organic cotton production. Mr. Soth replied that there are a lot of risks in organic production especially in individual production, but less so in partnerships with specialized organizations.

The CHAIR introduced Ms. Patricia Jurewicz, associate director of As You Sow, to present a report on social risks in the cotton sector and what can be done about them. She reported that answering demand from consumers for information on how a product is made, Wal-Mart announced an initiative called "Sustainable Product Index" to produce a common database on the global supply chain. She said Wal-Mart is surveying 100,000 of suppliers. She said that other companies too would like to know more about the environmental, economic, and social impacts of commodities. She noted that the ICAC Expert Panel on Social, Environmental and Economic Performance of Cotton (SEEP) has done a thorough job in reviewing the hundreds documents available addressing the use of child labor, forced labor and child forced labor in the cotton sector. She advised the cotton industry to be swift and explicit in its responses to a number of negative allegations. Ms. Jurewicz observed that in response to the increased awareness of environmental and social issues in the cotton industry, several types of initiatives have emerged, such as organic cotton, Fair-trade cotton, cotton made in Africa and others that are just emerging. She noted that these niche cottons represent only 2% of the world cotton market, but are projected to reach 30-40% in 15-20 years. She gave a number of recommendations for governments and private organizations, including providing accurate information on labor practices to ICAC, SEEP, FAO, ILO and NGO's, contributing to discussions in these institutions on minimizing negative impacts in cotton cultivation, ratifying ILO conventions 138 and 182 and requesting ILO's assistance in adhering to these conventions, and guaranteeing that economic development efforts exclude child labor, forced labor and environmental devastation in cotton production. Ms. Jurewicz's report is a statement of the meeting.

An observer from South Africa asked why organic cotton organizations are against adopting biotechnology in organic production. Mr. Ferrigno replied that there were concerns about biotechnology originally and he does not expect it to change soon. He does not consider biotechnology as a panacea and there are other ways to improve productivity and to reduce costs of production. He suggested that a dialogue on this issue is needed.

The delegate of UGANDA commented that organic cotton introduction in Uganda led to a decline in production and yields. She noted that in other countries where biotech cotton has been introduced, yields are rising. She said that farmers are confused about recommendations from proposed partnerships. She suggested that local certification bodies for organic cotton should be established in countries where organic cotton is grown.

Mr. Ferrigno supported the idea of establishing local certification bodies.

The delegate of KAZAKHSTAN commented that production of organic cotton leads to reduced fertility of the soil, a reduction in yields and high prices for manure. Mr. Soth replied that these observations are correct and suggested that green manure should be considered as an alternative.

A representative of Oxfam commented that there are multinational companies that urge producers to produce organic cotton, but the multinationals do not buy the production. He observed that to be profitable organic yields should be above 600 kg per hectare, but in practice it is difficult to achieve yields higher than 500 kg per hectare. Mr. Ferrigno acknowledged the problem with multinational companies and urged them to act more responsibly. Mr. Soth commented that if

the correct technology is used, yields could be higher and production of organic cotton profitable to producers.

The delegate of PAKISTAN commented that the renewed emphasis on Social compliance standards must be applied in a constructive, non-punitive manner. These standards should not be used as yet another barrier to trade. He said the push for reform should be a handholding process that allows developing countries to build capacities that allow effective enforcement of internationally recognized standards. The delegate said that punitive commercial sanctions are surely not going to help countries achieve their shared objectives.

The CHAIR adjourned the meeting at 11:15 am.

## Closing Session

11:00 hr. Friday September 11, 2009  
Dr. Eugene Brock in the Chair

The CHAIR invited the delegate of BURKINA FASO, host of the 67th Plenary Meeting, to provide closing remarks. The delegate thanked the Chair and other delegates for the opportunity to provide these remarks. He observed that the theme chosen for the meeting, "The Role of Cotton in Economic Development and Ensuring Food Security During a Period of Global Economic Crisis, was appropriate and that the theme reflected the current situation. He thanked speakers for the quality of their presentations. He said that the ICAC meeting had served as a framework for exchange of views based on diverse experiences. He thanked the interpreters, the Secretariat, the South African Organizing Committee and the Government of South Africa and Cotton South Africa for their efforts toward a successful plenary meeting. The delegate congratulated the executive director on his reappointment and said that Burkina Faso looked forward to working with him to further

the goals of the ICAC.

The CHAIR thanked the delegate of Burkina Faso for his kind words, and he asked if other countries wished to make closing statements.

The delegates of TANZANIA, ARGENTINA, COTE D'IVOIRE, INDIA, BRAZIL, TURKEY, CHINA (TAIWAN), SUDAN, NIGERIA, KENYA, GERMANY, MALI and UGANDA made closing remarks. Countries thanked the people, government and industry of South Africa for their hospitality and excellent arrangements for the meeting. They thanked the Secretariat, including the interpreters and other staff, for their work. They thanked Dr. Brock for serving as Chair of the Plenary Meeting and the Chairs of each session for their efforts to keep discussions focused and on time. Several delegates commented favorably on the depth and breadth of discussions and for the insightful comments of other delegates. It was noted that the Statement of the 68th Plenary Meeting would give impetus to a successful conclusion of the Doha

Round. Numerous countries congratulated the executive director on his reappointment and said they looked forward to continuing to work with the Secretariat to strengthen the cotton industry. Countries noted that the theme and topics were highly appropriate and that the results of the meeting would help to reassure governments that cotton is important to the world economy and that cotton has a strong future.

The CHAIR said that it had been a pleasure and honor for the Government of South Africa to host the 68th Plenary Meeting of the ICAC. He congratulated the speakers and the chairs of each session for their excellent presentations. He thanked the Secretariat for efficient organization of the meeting, and he wished the executive director good luck for the future. The Chair said that he was confident that the ICAC would remain an efficient and effective organization. He wished all delegates safe journeys home.

Seeing no other business, the CHAIR adjourned the Closing Session at 12:20 pm.

# Meeting of the Steering Committee

16:00 hr. Thursday September 10, 2009  
Mr. Ashraf El-Rabiey in the Chair

The CHAIR reported that a nominating committee had met in May 2009 to identify officers of the Standing Committee for 2009-10. He said that Mr. Azmat Ali Ranjha of Pakistan had been nominated to the position of Chair of the Standing Committee, Mr. Patrick Packnett of the U.S. had been nominated for First Vice Chair and Mrs. Lilly Munanka of Tanzania, had been nominated for the position of Second Vice Chair. The Chair reported that the Standing Committee had approved the nominations, and he asked delegates if there were any concerns regarding the nominations. Seeing no concerns or questions, the nominations were approved.

Mr. Ranjha thanked the Committee for the honor of serving as Chair of the Standing Committee during the coming year. He said he looked forward to working with the other officers and members of the Standing Committee to continue the work of the ICAC. He thanked the Chair, Dr. Ashraf El-Rabiey, for his service during the past year and looked forward to having Mr. El-Rabiey continue to serve on the Standing Committee.

Members of the Committee applauded the election of Officers. Working Paper I "*Election of Standing Committee Officers*" is attached.

The CHAIR noted that the contract of the executive director would expire at the end of 2009. The executive director has asked for an extension of two years (January 2010 to December 2011) at the level of UN Grade D-1 Step VIII, consistent with his time-in-service with the ICAC under UN rules.

At the request of delegates, the executive director left the room, so that discussions could be conducted confidentially.

(The Steering Committee Meeting continued in executive session.)

Upon return to the Steering Committee meeting, the executive director was informed by the CHAIR that his request for a contract extension for two years at the level of D-1 Step VIII had been approved.

The executive director thanked the Committee for the honor of serving as executive director. He said that the ICAC is an effective and necessary international organization providing needed public infrastructure to the cotton industry.

The delegate of ARGENTINA noted that approval of the contract of the executive director is a function of the Advisory Committee, not the Standing Committee, and he was gratified that this procedure had been followed. Working Paper II "*Renewal of the Contract of the Executive Director*" is attached.

The CHAIR called the attention of delegates to the Draft Statement of the 68th Plenary Meeting that had been approved by the Drafting Group, and he asked the Secretary General to read the statement. After the statement had been read, the CHAIR asked if they were any errors or omissions.

The delegate PAKISTAN said the Statement accurately reflected the work of the Drafting Group and should be approved.

The delegate of BRAZIL, who had served as Chair of the Drafting Group, called attention to one grammatical error, but said that otherwise the statement represented the results of the meeting of the Drafting Group and should be approved.

The delegate of ARGENTINA agreed that the Statement should be approved, with the correction of the grammatical error. The delegate went on to congratulate and thank the Chair of the Standing Committee and the Chair of the Drafting Group, the Secretariat, interpreters, and other delegates for their professionalism, courtesy and spirit of cooperation in preparing the Statement of the 68th Plenary Meeting.

Seeing that no others delegates wished to speak, the CHAIR found that the Statement of the 68th Plenary Meeting was approved.

The Steering Committee meeting was adjourned.

## ATTACHMENTS

### Working Paper I

#### Election of Standing Committee Officers

#### Recommendation from the Standing Committee

A Nominating Committee met in May 2009 and proposed a slate of officers for the Standing Committee for 2009-10. Delegates from Brazil, China (Taiwan), Egypt, Pakistan, and the executive director attended the meeting. Dr. Ashraf El-Rabiey of Egypt, Chair of the Standing Committee, served as Chair of the Nominating Committee.

The Rules and Regulations specify that when practicable, the First Vice Chair will be nominated to succeed the outgoing Chair and the Second Vice Chair nominated to succeed the First Vice Chair. The current First Vice Chair of the Standing Committee, Mr. Azmat Ali Ranjha, Minister (Trade) of the Embassy of Pakistan, will be able to serve as Chair in 2009-10. Accordingly, there was a consensus to nominate Mr.

Ranjha as Chair. However, the current Second Vice Chair, Ms. Ayse Gül Barkçin, Chief Commercial Counselor, Embassy of the Republic of Turkey, expects to be reassigned to capital and will not be available to serve on the Standing Committee next year.

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

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

After consideration of these factors, the Nominating Committee agreed that Mr. Patrick Packnett, Assistant Deputy Administrator at the Foreign Agriculture Service of the United States Department of Agriculture, should be nominated to the post of First Vice Chair. The Nominating Committee agreed that Mrs. Lily Munanka, Head of Chancery of the Embassy of Tanzania should be nominated to the post of Second Vice Chair.

The nominations were distributed to the Standing Committee on May 22, 2009. The Secretariat did not receive any objections by the beginning of June, and the nominations were considered approved by the Standing Committee.

Accordingly, the Standing Committee proposes the following slate of officers to the Plenary Meeting for the period from the end of the 68th Plenary Meeting in 2009 to the end of the 69th Plenary Meeting in 2010:

- Mr. Azmat Ali Ranjha for Chair,
- Mr. Patrick Packnett for First Vice Chair, and
- Mrs. Lily Munanka for Second Vice Chair.

### Working Paper II

#### Renewal of the Contract of the Executive Director

#### Recommendation from the Standing Committee

According to the Rules and Regulations of the ICAC, Article VII, Section I, the Secretariat shall be headed by an Executive Director and shall hold office during the period of his/her contract of employment. The Staff Regulations of the ICAC, Article II (a), state that the basic emoluments and contract of the Executive Director shall normally be determined by a Plenary

Meeting on the recommendation of the Standing Committee.

The current contract for the executive director expires December 31, 2009.

In April this year, the executive director asked the Standing Committee to approve a two-year extension of his current contract at the level of UN grade D1-Step VIII. The executive director is currently paid at the level of UN grade D1-Step VII, but if he were employed in the UN system he would be eligible for a promotion to Step VIII as of January 1, 2010 based on time-in-service. The request by the executive director was contained in the Proposed Budget and Scale of Assessments for 2009-10. The Standing Committee approved the Proposed Budget and Scale of Assessments for 2009-10. No countries expressed reservations about the executive director's request for a contract extension.

Accordingly, the executive director is asking the Advisory Committee to approve a two-year extension of his contract at the level of UN grade D1 Step VIII for the period beginning January 1, 2010 and ending December 31, 2011.

### **Working Paper III**

#### **Topic of the 2010 Technical Seminar**

#### **Proposals from the Secretariat to the Committee on Cotton Production Research**

The following themes are suggested as possible topics for the 2010 Technical Seminar:

##### **Global Impact of Biotech Cotton**

Biotech cotton was commercialized 15 years

ago, and the area planted to biotech varieties is forecast to surpass half of the world total by 2009/10. Twelve countries have commercialized biotech cotton, and experiments are being undertaken in other countries. Many more are working on the legal framework for safe importation, testing and utilization of biotech cotton. Biotechnology has many applications. Lower costs, lower pesticide use and higher yields are the primary expectations from the insect resistant biotech varieties. Biotechnology in cotton through genetic engineering has opened a new era of directed cotton breeding. If a specific desirable gene is identified in cotton, other crops or organisms, genetic engineering has provided a tool to isolate and induct those genes into cotton. On the other hand, critics of the technology continue to question the potential benefits and the long-term implications of the use of biotechnology in cotton. Biotech varieties are not eligible for organic certification. In the 1990's when this technology was introduced, it was expected that improved fiber quality, enhanced agronomic characteristics and other improvements would quickly follow the development of insect resistant and herbicide resistant features, but these improvements have not happened yet. Fifteen years are enough to critically analyze the impact of biotech cotton for reductions in insecticide use, lower costs of production, increases in yields, effects on cotton quality and changes in research programs.

##### **How to Lower Cost of Production of Cotton?**

The cost of production of cotton per hectare continues to rise because of higher input costs, higher labor costs and operational costs. Increases in costs per hectare can only be offset through increases in yields and reduced inputs costs. But, it seems that once again cotton yields around the world have entered a period of slow growth. Consequently, the cost of production per

kilogram of lint is expected to increase for many years until world cotton yields rise rapidly once again or the costs inputs decline. If the cost of production is not controlled, cotton is expected to loose its profitability against other crops. According to an analysis done by the ICAC Secretariat, the high cost of production is also one of the factors responsible for the declining market share of cotton against chemical fibers. Papers could be invited on possible approaches to minimize the cost of production of cotton.

##### **Insecticides and Their Use on Cotton**

It is estimated that agrochemicals worth US\$36 billion were used in the world in 2007. Cotton accounted for 17% of plant protection chemicals used that year. The share of cotton in pesticides is declining mostly because of lower insecticide use. Countries are finding ways to lower insecticide use, and many countries have succeeded even without using insect resistant biotech cotton. The deleterious effects of insecticide use are better understood today than they were two decades ago. Integrated Pest Management (IPM) in cotton has been talked for about decades, but its implementation was dominated by extensive promotion of insecticide use. Insecticides not only increased the cost of production to uneconomical levels but also gave birth to serious problems like insecticide resistance and changes in the pest complex. Consequently, insecticides have become a threat to the sustainability of cotton production worldwide. The negative environmental impacts of insecticide use are receiving more attention. A number of countries have successfully implemented IPM in order to contain insecticide use. For long-term sustainability of cotton production, it is important that insecticide use is diminished and alternate, less expensive and environmentally safe, methods of insect control be found, promoted and adopted.

## Round Table

### *The Role of Organic Production in the Cotton Industry*

14:30 hr. Sunday September 6, 2009  
Mr. Graham Thompson in the Chair

The 68th Plenary Meeting of the International Cotton Advisory Committee (ICAC) is underway. Speakers during a Roundtable discussion on Sunday the 6th suggested that organic cotton has the potential to provide new ideas that can influence and support wider sustainability drives in the sector. The organic cotton sector continues to grow, albeit more slowly in the global economic slowdown, reaching over 180,000 metric tons of lint in 2008/09.

Organic cotton is one option to meet the challenges of land use, food security and water scarcity. Small growers exposed to variable rainfall and problems from debt produce most organic cotton in India. Many farmers view organic cotton as a risk reduction tool, but the use of fewer purchased inputs involves a tradeoff with productivity. Often the smallest and most resource poor farmers come to organic, and in fact organic works better in marginal or tribal areas. Certification of organic cotton is expensive and in some states of India the government is supporting certification costs. Speakers conveyed a collective message that organic cotton

requires technological knowledge.

An essential element of organic cotton production is to have more planning and certainty through partnerships to ensure long-term viability. Organic cotton production, processing, spinning and marketing at the retail level involve a long and complex chain requiring traceability and communication links between producers and consumers. The future of organic cotton production may involve contract farming with direct links to retailers.

Presentations from all panelists are statements of the meeting.

## First Breakout Session

### *The Role of the Organization in the Cotton Economy*

9:00 hr. Tuesday September 8, 2009  
Mr. Phenias Gumede in the Chair

The chairman's introductory remarks highlighted the structure of the South African cotton industry forum and its functions.

Dhiren Sheth, President, Cotton Association of India, (CAI), elaborated on the formation of the CAI and its functions. He reported on future plans of CAI. Mr Sheth's presentation is a statement of the meeting.

Mark Lange, President/CEO, National Cotton Council of America (NCC) described the formation of the council, its functions, services rendered to members and the relationship between the NCC and the U.S. government. Mr. Lange's presentation is a statement of the meeting.

Andrew Macdonald, representing the Association of Brazilian Cotton Producers (ABRAPA) described the cotton production areas of Brazil

and the formation ABRAPA. Mr. Macdonald's report is a statement of the meeting.

There was agreement among breakout session participants on the importance of industry organizations in representing the interests of the cotton sector. It was noted that the basic services rendered by each of the organizations have much in common.

## Second Breakout Session

### *Progress Toward Harmonization of Trade Rules*

9:00 hr. Wednesday September 9, 2009  
Mr. Andrei Guitchounts in the Chair

#### **Key points of the discussion**

Mr. Neal Gillen – ACSA, ICAC representative to UNCITRAL

- The level of defaults on valid arbitral awards in the cotton industry increased by 10% since 2008.
- Increases in defaults took place in 15 countries.
- Bangladesh, Brazil and India account for 40% of all defaults on cotton contracts.
- Reasons for increased defaults include a

decline in prices and the globalization of trade.

- Defaults add substantially to the cost of trade in cotton.
- The harmonization of trade rules would help to reduce defaults by simplifying trade in cotton: "there is a need to read from the same rule book".
- A system of world cotton trade can function efficiently and affordably only with a universal set of rules.

Mr. Gillen's report is a statement of the meeting.

The Gdynia Cotton Association (GCA) reported on progress toward harmonization of trade rules. On September 2, 2009, the GCA's Board of Directors passed a resolution authorizing the GCA and the Rules Committee of the ICA to conduct intensive work on further harmonization of the Rules aimed at reaching a decision on which Rules should be adopted and applied by the Gdynia Cotton Association.

The Bremer Baumwollbörse (BBB) explained that in adopting the ICA rules, they adopted only the "Trade Rules" and that Arbitration remained under German Law. It was reported that about 70% of trade is conducted under the ICA rules, but companies often buy under regional rules (such as AFCOT in Africa) and sell on ICA rules

to China and other destinations.

#### The participants in the Breakout Session

- Welcomed the progress toward harmonization of trade rules by GCA.
- Noted that with harmonization of rules regional cultural differences must be respected.
- Some of the major differences between rules include time limitations and “invoicing back”.
- Publicizing information about defaults is important to deter defaults.

- Trade rules help to minimize risks and the cost of doing business.
- Ongoing education about the trade rules is important.
- An efficient arbitration system is essential.
- Trading with defaulters undermines the efficacy of trading rules.

#### Conclusions

- Harmonization of Trade Rules is important and necessary.
- Progress in harmonization of rules achieved by the BBB and GCA is praised.

- All Cotton Associations are urged to undertake such practical steps on the way to universal harmonization of trade rules.
- Arbitration systems may differ in language, cultural and legal bases imbedded in national laws.
- The issues of contract defaults and harmonization of trade rules are so important that ICAC is urged to include these issues for discussions in an open session during the next Plenary Meeting. Wider audiences and governments should be involved in the discussion on how to improve industry competitiveness, discourage defaults on valid arbitral awards and to harmonize trade

## Third Breakout Session

### Enhancing Demand for Cotton Products

11:00 hr. Wednesday September 9, 2009

Chair: Mr. Jeffrey Silberman, IFCP

Dr. Alejandro Plastina, ICAC Secretariat

Dr. Patricia O’Leary, Cotton Incorporated

#### Key points of the discussion

Dr. Alejandro Plastina – ICAC Secretariat

- World textile fiber consumption more than quadrupled between the early 1960s and the late 2000s.
- However, while cotton consumption more than doubled during that period, consumption of other fibers (wool, chemical and non-chemical fibers) increased sevenfold.
- Consequently, the market share of cotton decreased from an average of 62% in the 1960s to 40% in the 2000s.
- The demand for cotton and non-cotton textile fibers are more sensitive to changes in income than to changes in relative prices, i.e. a 1% increase in GDP per capita generates, on average, a higher increase in demand for each fiber than a 1% decrease in the corresponding relative price.
- The market share of cotton is expected to decline to 30% by 2020.
- Promotional efforts are critical to the expansion of cotton markets worldwide.

Dr. Plastina’s report is a statement of the meeting.

Jeffrey Silberman – IFCP Executive Director

- Working with higher education can be an inexpensive way to create domestically focused cotton promotion programs that can be replicated around the world.
- Hands-on projects including developing high-cotton content products and projects with students studying textile technology

and design enable future fabric developers to access the resources available from the cotton community. In just a few years, these graduates are in a position to influence fiber content in textiles, and thus impact cotton’s market share.

- The denim project at the Fashion Institute of Technology (FIT) in New York has created over 200 fabric developers who are now in decision-making positions.
- Developing a Speakers Bureau that utilizes industry advisors can facilitate project development through expertise that fosters a cotton friendly environment that will make future product developers more employable faster, and better positioned to facilitate fiber content favorable to cotton.
- A Speakers Bureau is flexible and can be expanded to cover different topics relevant to issues that are pertinent at any point in time, including sustainability issues, and debunking anti-cotton misperceptions and disinformation.
- A Speakers Bureau is a cost effective way to provide cotton industry actors at all points of the supply chain with a window into the environment of designers, retailers, and others who eventually influence retail market share of cotton.
- The International Year of Natural Fibres provides a marketing opportunity to the cotton industry.

The International Forum for Cotton Promotion (IFCP) introduced the IFCP Speakers Bureau by presenting three of the organization’s activities over the previous year. Included in the program was an introductory presentation by the ICAC Secretariat projecting cotton’s current and future market share. Video clips of related material were introduced, followed by an interactive

discussion with the attendees that numbered over 70. The IFCP encouraged the cotton community to embark on similar projects, and agreed to make the videos available to those interested, as well as material that could assist.

The topics included the now 5-year running denim project developed with students at the Fashion Institute of Technology (FIT) in New York City with participation from industry advisors, and the participation by cotton research and promotion organizations in a panel entitled “Cotton Sustainability in the Textile Complex”. In addition, video highlights of the 498th ICAC Standing Committee, where committee Members were able to engage with designers, product developers, and retailers were presented, and the attendees had time to comment.

Mr. Silberman’s report is a statement of the meeting.

#### Conclusions

- The falling market share of cotton now makes demand enhancement efforts imperative.
- There are ways to promote cotton inexpensively that can be replicated around the world.
- Working with institutes of higher education is an efficient and cost effective vehicle to accomplish cotton promotion.
- Participants in both developed and developing countries appeared to be energized by the breakout session, and ready to act.
- The work of the IFCP is significant and important, and should continue.
- The statement by Cotton Australia that it was committed to joining the IFCP was warmly received.

## Fourth Breakout Session

### *The Impacts of Carbon Trading on the Cotton Industry*

11:00 hr. Thursday September 10, 2009

Mr. Richard Haire in the Chair

Papers were presented on The Impacts of Carbon Trading on the Cotton Industry, by Bruce Pyke,

Cotton Research and Development Corporation, Australia and on the Impact of carbon markets on the Cotton Industry by Jens Soth, Coordinator for Research and Implementation Activities,

Helvetas Organic Cotton Center, Switzerland.

Both presentations are statements of the meeting.

## Fifth Breakout Session

### *Best Practices in Cotton Ginning*

13:45 hr. Thursday September 10, 2009

Mr. Stan Rudman in the Chair

#### Key points of discussion

#### Luz Amparo Fonseca-Prada – Colombia

- 100% of Colombian cotton is HVI analysed and grade is based on USDA norms
- Quality of cotton is based on 5 characteristics- length, micronaire, strength, trash and grade.
- There are 21 gins owned by the private sector and with a 334,000mt of capacity, only 30% of the capacity is utilized.
- Only 20% of the cotton crop is mechanically harvested.
- The ginning fee is 80% of the domestic market price for 1 ton of cotton seed.
- The seed cotton is physically inspected for contamination before ginning.
- The lint bales are all bar coded to trace the source of contamination back to the producer.
- Contamination free cotton is promoted through captions on radio, posters, flyers and videos.
- There are 2,400 cotton producers in Colombia.
- There is a need for incentives to introduce newer machinery and ginning equipment.

Mrs Fonseca-Prada's presentation is a statement of the meeting

#### Questions

- Q. Is contamination less in Machine picked cotton?
- A. Yes, but there are more smaller pieces of

foreign matter.

Q. Is final payment on lint grades?

A. Yes, final payment is on lint grades, there are no seed cotton standards.

#### Tiena Coulibaly – Mali

- There are 75 gins in West Africa with 17 gins in Mali.
- Best practices begins in the field regarding storage as a first step.
- Cotton scrutinized at the gin for any signs of contamination.
- Cotton is humidified before ginning.
- Gin stand speed is constantly monitored during the ginning process.
- Explain the entire ginning process and characteristics to determine quality.

#### Questions

Q. What is the capacity of the 17 gins?

A. 570,000 mt of seed cotton, utilizing less than 50% of capacity at present. Record season of 620,000mt

Q. What is causing NEP formation at the gin?

A. Over ginning and excessive speed.

Q. Any ideas how to minimize power consumption/ Energy conservation?

A. Up to the ginning staff to optimize, ensure all equipment, pipes and tubes are in a working order.

#### Ed Hughs – USA

- 30 years experience as ginning engineer and researcher.
- USA cotton system is completely mechanized.

- The producer maintains ownership of cotton after ginning.

- Graphically explain, by means of slow speed video images, the workings of the cleaning components of the gin, incline cleaner and the stick machine.

- Illustrates the working of the (1) knife roller gin as well as of the (2) rotary knife roller gin.

- Illustrates the working of the saw gin stand and the saw-type lint cleaner.

Mr Hugh's presentation is a statement of the meeting

#### Questions

Q. What gins are used for longer staple cotton?

A. Pima cottons as well as long staple upland cotton are more and more ginned on roller gins.

Q. What about seed damage?

A. Roller gins do less damage than saw gins do.

Q. What about moisture content of the seed cotton.

A. The moisture content for roller ginning should ideally be around 4%. Ed also mentions that he runs a ginning school and the ginner's handbook is in the process of being updated.

Q. India uses a double roller ginning system is it viable?

A. The double roller system will increase the speed of production but care should be taken of the power supply and size of motors.

## Sixth Breakout Session

### *Best Practices in Instrument Testing*

16:00 hr. Thursday September 10, 2009

Mr. Lawrence Hunter in the Chair

#### **Presenters/Panelists**

- Jimmy Knowlton, Chief Standardisation and Engineering Branch, USDA, USA

- Marco Mtunga, Director, Regulatory Services, Tanzania Cotton Lint and Seed Board, Tanzania

- H lvio Alberto Fiedler, Executive Director, UniCotton Cooperative of Cotton Producers, Brazil

- Rinat Gulyayev, Head of Board, Uzbek Centre for Certification of Cotton Fiber (SIFAT), Uzbekistan

The four panellists presented the status quo in their respective countries as far as high volume instrument testing of cotton for classing and trading purposes was concerned. It was noted that most cotton associations and countries around the world are moving towards instrument testing. During the ensuing discussions, particular emphasis was placed on the need to work towards a universally acceptable and comprehensive Manual covering Best Practices in Instrument Testing. It clearly emerged from the respective presentations and ensuing discussions that the Universal Cotton Standards and highly sophisticated USDA system operating in their various

Classing Offices represented the most advanced and 'benchmark' best practices system, on which the other countries largely based theirs.

Appreciation was expressed to the USDA for the leading role they have played in the global advancement of the instrument testing and classing of cotton for trading and other purposes. The Session also recognised the important roles the USDA, ICAC/CSITC, SIFAT, ASTM, ITMF/ICCTM, Uster Technologies and other bodies, as well as the HVI Guidelines (e.g. USDA and ITMF) played in moving towards a position where such a Best Practice Manual could be prepared and hopefully widely accepted for cotton testing, classing and trading purposes. The ICAC/CSITC Task Force has played a leading role in bringing the cotton world together in this respect.

The Session emphasised the critical importance of stable and standard atmospheric conditioning and cotton conditioning as well as round trials, proper instrument maintenance and proper training programmes in achieving consistently accurate and reliable test results. Caution was expressed against relying upon instrument correction for deviations in laboratory air conditioning, and therefore in cotton moisture content, from the standard conditions, since it is felt that such an approach and correction can lead to errors since different cottons react differently to

changes in atmospheric conditions. Maintaining the laboratory atmospheric conditions within the correct standard conditions and tolerances, and conditioning the cotton accordingly and properly, were advised and recommended until such time that instrument correction was proved, and accepted, to be reliable and accurate for all the various types and varieties of cotton being tested around the world.

The Session recommended that the Manual should also include the following aspects:

- Laboratory and air-conditioning design and infrastructural requirements
- Sample conditioning guidelines for both conventional as well as rapid conditioning
- Sampling and sample handling and identification procedures
- Test result recording and reporting (data recording and handling)

The Session concluded, and agreed, that there was sufficient information and data available to draw up a 'generic' Best Practices 'Manual' and recommended that this should take place as a matter of some urgency, preferably under the auspices of the CSITC, at the next meeting of the CSITC Task Force in Bremen during March, 2010.

Presentations from all four panelists are statements of the meeting.

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## DOCUMENTS

1. Agenda
2. Report of the Chairman of the Standing Committee
3. Report of the Executive Director
4. COTTON: Review of the World Situation, July-August 2009
5. COTTON: World Statistics – September 2009
6. The Outlook for Cotton Supply in 2009/10
7. World Textile Demand – September 2009
8. World Cotton Trade – September 2009
9. THE ICAC RECORDER – June 2009
10. Current Research Projects in Cotton – September 2009
11. Production and Trade Policies Affecting the Cotton Industry – September 2009
12. Directory
13. Memorandum 872: Procedural Matters for the 68th Plenary Meeting

## WORKING PAPERS

- I. Election of Standing Committee Officers 2009-10
- II. Renewal of the Contract of the Executive Director
- III. Topic of the 2010 Technical Seminar

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