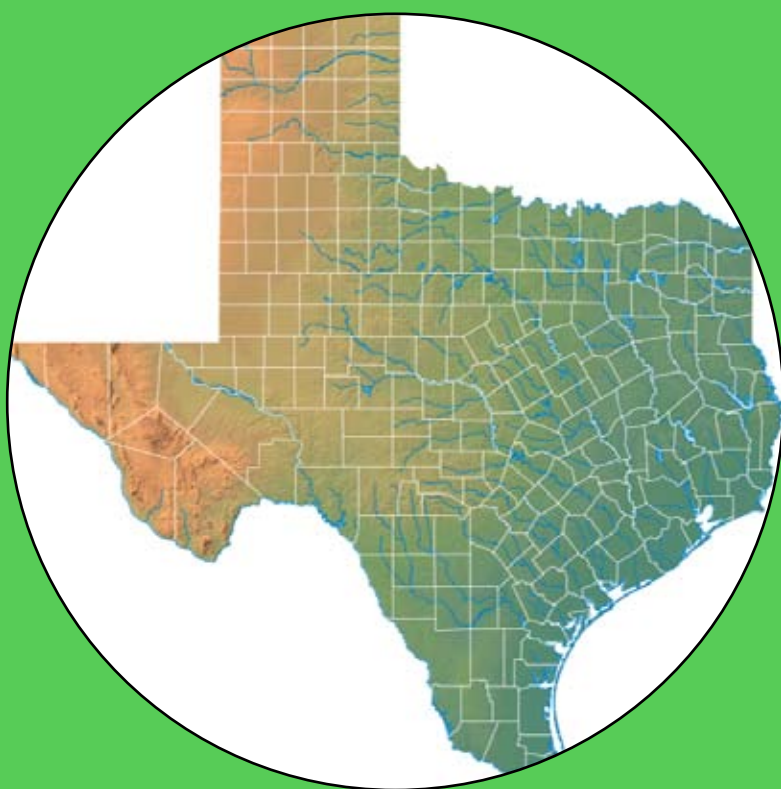




PROCEEDINGS

of the 69th Plenary Meeting



***Cotton Industry
Growth Through
Global Unity***

September 2010



Discover
Natural
Fibres
Initiative

INTERNATIONAL COTTON ADVISORY COMMITTEE

PROCEEDINGS OF THE 69th PLENARY MEETING

“Cotton Industry Growth Through Global Unity”



ICAC
Washington DC USA

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FOREWORD

At the invitation of the Government of the United States of America, the 69th Plenary Meeting of the International Cotton Advisory Committee was held in Lubbock, TX, from 20-25 September 2010.

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

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

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

MEMBER GOVERNMENTS

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

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

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STATEMENT OF THE 69th PLENARY MEETING

“Cotton Industry Growth Through Global Unity”

The International Cotton Advisory Committee (ICAC) met in Lubbock, Texas, USA during September 21-25, 2010 for its 69th Plenary Meeting since the establishment of the Committee 71 years earlier. Nearly four hundred people attended the meeting, including representatives from 39 governments and 9 international organizations. The Committee welcomed the Government of Mozambique as its newest member. The theme of this Plenary Meeting laid emphasis on unity and aptly summarized the need to ensure that the common interests of all stake holders in the cotton value chain, including farmers, ginnerers, traders, textile mills and consumers, are adequately addressed.

1.1. The Secretariat reported that world cotton production is expected to rise by 16% in 2010/11, encouraged by the significant rise in cotton prices during the past year. Cotton mill use is also recovering from the steep decline during the global recession, and world cotton trade is rising with increased consumption. The Secretariat estimated that average cotton prices during the current season would be at their highest level since 1994/95. However, the Secretariat cautioned that preliminary forecasts for next season (2011/12) suggest that stocks could rise, indicating an eventual decline in cotton prices.

1.2. The Committee noted that some countries were particularly concerned with the risks posed by price volatility to producers, ginnerers, traders and textile mills, and recommends that price issues should continue to be the focus of ICAC surveillance, and data collection. The Committee recognized the need to enhance dialogue between cotton producers and cotton consumers to improve cotton market data, and transparency.

2.1. The ICAC supported the UN definition of sustainability as development that meets the needs of the present without compromising the ability of future generations to meet their needs. Member governments recognized that cotton producers have made great strides in improving the environmental and social dimensions of sustainability over the last two decades through the use of new technologies and improved management practices.

2.2. The Committee received a report from its Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP) on pesticide use in cotton, which is a common concern whenever the theme of sustainability of cotton cultivation is discussed. According to SEEP, even though world production increased, cotton's share by value of global pesticide consumption declined from 11% in 1988 to 6.2% in 2009. SEEP developed eight recommendations, and all eight of the recommendations on pesticide use in cotton were accepted by the ICAC:

1. WHO Hazard Class I pesticides should be eliminated in countries where adequate provisions for their management are not in place.
2. Cotton-producing countries where the use of pesticides other than herbicides is higher than 1 kilogram of active ingredient per hectare should analyze and address the causes of such use.
3. The use of active ingredients that account for the highest contribution to the environmental toxic load should be minimized to reduce the environmental hazards to aquatic organisms and bees.
4. Pesticides known to pose risks to unborn or breast-fed children should be eliminated from the cotton production system.
5. Governments, with the involvement of all concerned stakeholders in the cotton sector, should make a strong effort to promote best management practices in plant protection and to reduce reliance on pesticides and subsequent risks to the environment and human health.
6. Governments should consider both environmental and health risks while formulating clear policy statements relative to pesticide risk reduction.
7. Governments should promote the collection of reliable crop-specific data related to pesticide use.
8. Follow-up risk assessment studies should be conducted.

In addition, the Committee strongly affirmed that SEEP should continue and extend studies to interested cotton producing countries.

2.3. The Committee received a report from its Secretariat indicating that the world cotton industry is being maligned by some criticisms that are inaccurate, exaggerated or distorted allegations of waste, abuse and harm associated with cotton production. It was noted that the cotton industry has been responding to valid concerns for decades by acknowledging the need for improvement, working to develop pragmatic approaches, and encouraging adoption of best practices. The Committee agreed that there are valid concerns associated with cotton production practices, and improvements are needed. However, there is a need to confront those who criticize the cotton industry for commercial advantage, and the Committee instructed the Secretariat to work with the Standing Committee, the Private Sector Advisory Panel, the International Forum for Cotton Promotion and industry organizations to provide fact-based information about the performance of the cotton industry.

2.4. The Committee received a report from its Private Sector Advisory Panel (PSAP) about phytosanitary requirements for cotton moving in international trade. The Committee agreed with the PSAP that the Secretariat should provide additional information on

phytosanitary requirements for trade in cotton. The Committee instructed its Secretariat to work with the Standing Committee to encourage all countries to adopt harmonized phytosanitary requirements for trade in cotton.

2.5. In addition, the PSAP reported that it appreciates all initiatives intended to improve cotton production practices. However, the PSAP expressed concerns about some retailers and others in the value chain using programs designed to improve production practices as tools of public relations for competitive advantage. The Committee instructed its Secretariat to compile a glossary of terms and a roster of participants in the many and various programs and initiatives working for improvements in cotton production practices.

2.6. The Committee noted that “sustainable” production and “organic” production are not synonymous, and many cotton production systems ranging from those that are highly capital intensive to those that are highly labor intensive can be sustainable. Organic production is one option for sustainable production. The Committee agreed that a session on organic cotton production would be conducted during the 70th Plenary Meeting.

3.1. The Committee was informed that the term “cotton technologies” today often refers to “transgenic technologies” and that transgenic cotton is now commonplace, making it possible to incorporate desirable traits that would otherwise not be available by expanding the gene pool for cotton breeding to other species. Scientists indicated that DNA markers are enabling conventional breeders to greatly improve the odds of finding favorable recombinants for traits that are quantitatively inherited, such as fiber yield and quality. In countries using mechanical picking, one of the greatest advances in cotton research in recent decades has been the development of pickers equipped with electronic weigh systems, making it possible to improve selections in breeding programs. Breeders are now using an index called, “quality score,” to aggregate six fiber quality parameters into one measurement, further aiding selections in breeding programs.

3.2. The Committee was informed that biotechnology is an important tool to improve the sustainable production of cotton. It was also noted that some countries that do not use transgenic cotton seeds also achieve high yields while using only minimal amounts of insecticides. Further, some countries are concerned that the high costs of transgenic cotton seeds, and the greater requirements of technology management and knowledge transfer from seed companies to farmers, pose a potential threat to the economic viability of cotton production in those countries.

3.3. Governments took note that many of the emerging technologies that will influence the structure of the world cotton industry are expensive to develop. Several Members of the ICAC voiced support for the creation of an International Center for Cotton Research (ICCR) during the 68th Plenary Meeting in 2009. Many governments still consider that an ICCR could lower the cost through innovative technologies and speed up the development in cotton research. The ICCR could expand the adoption of cotton technology through greater coordination of efforts. The Committee noted that the Standing Committee is to prepare a report for consideration at the next Plenary Meeting.

3.4. The ICAC was informed that the use of the term “natural fiber” by the cotton industry has been challenged because of the employment of genetic engineering in over half of all cotton produced. The ICAC agrees that the fiber produced from cotton plants is a “natural fiber,” regardless of production methodology or seed technology.

4.1. The Secretariat reported that subsidies to the cotton industry totaled US\$3.5 billion in 2009/10, down from US\$6.2 billion in 2008/09. Seven countries provided subsidies in 2009/10 averaging 13 cents per pound, down from nine countries providing an average of 14 cents per pound in 2008/09. The Secretariat noted that these subsidies distort the world cotton economy, and many countries urged immediate elimination. The report was limited to direct support to production, border protection, crop insurance subsidies, minimum support price mechanisms and export subsidies.

4.2. The Committee reaffirmed the urgent necessity for an ambitious and balanced conclusion to the Doha Round with development as its centerpiece. The Committee encouraged all WTO Members to contribute to bringing the Doha Round to a balanced and ambitious conclusion through negotiations, flexibility and compromise. ICAC Members reiterated that cotton is an integral part of the Doha Development Agenda (DDA) and that there can be no completion of the DDA without a solution on cotton. WTO Members have agreed that cotton will be treated ambitiously, expeditiously and specifically within the overall negotiations on Agriculture.

4.3. The Committee agreed that countries need to avoid the use of protectionist measures in a closely integrated cotton economy. Members of the ICAC understand that such measures lead to uncertainty, volatility, and distortions to cotton trade.

Appreciation of U.S. Hospitality: The Committee thanked the people, the Government, and the cotton industry of the United States and the people of Lubbock for their hospitality and organization in serving as host of the 69th Plenary Meeting. Members of the ICAC noted that the United States has hosted 17 plenary meetings since the creation of the Committee in 1939, and the commitment of the United States to unified actions in pursuit of common goals within the world cotton industry was much appreciated.

Future Plenary Meetings: The Committee enthusiastically accepted an 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, Greece, India, Iran, Israel, Italy, Kazakhstan, Kenya, Korea (Republic of), Mali, Mozambique, Netherlands, Nigeria, Pakistan, Poland, Russia, South Africa, Spain, Sudan, Switzerland, Syria, Tanzania, Togo, Turkey, Uganda, United States of America, Uzbekistan, Zambia, Zimbabwe.



SUPPLY AND DISTRIBUTION OF COTTON

September 24, 2010

Seasons begin on August 1

	2006/07	2007/08	2008/09	2009/10 Est.	2010/11 Proj.	2011/12 Proj.
	Million Metric Tons					
BEGINNING STOCKS						
WORLD TOTAL	12.559	12.792	12.231	11.868	8.96	9.08
CHINA	3.991	3.653	3.321	3.585	2.94	2.92
USA	1.321	2.064	2.188	1.380	0.65	0.52
PRODUCTION						
WORLD TOTAL	26.757	26.029	23.338	21.795	25.25	26.41
CHINA	7.975	8.071	8.025	6.850	6.96	7.24
INDIA	4.760	5.219	4.930	5.050	5.72	5.83
USA	4.700	4.182	2.790	2.654	4.10	4.15
PAKISTAN	2.121	1.876	1.891	2.019	1.89	2.08
BRAZIL	1.524	1.602	1.214	1.181	1.48	1.70
UZBEKISTAN	1.171	1.206	1.000	0.850	1.06	1.07
OTHERS	4.506	3.873	3.488	3.191	4.03	4.33
CONSUMPTION						
WORLD TOTAL	26.429	26.509	23.504	24.639	25.13	25.52
CHINA	10.600	10.900	9.265	9.867	10.02	10.15
INDIA	3.908	4.050	3.863	4.222	4.56	4.79
PAKISTAN	2.633	2.649	2.428	2.307	2.25	2.30
EAST ASIA & AUSTRALIA	1.864	1.835	1.680	1.816	1.87	1.88
EUROPE & TURKEY	2.084	1.744	1.409	1.537	1.52	1.52
BRAZIL	0.992	1.007	0.974	0.979	1.00	1.02
USA	1.074	0.998	0.781	0.751	0.74	0.69
CIS	0.681	0.664	0.596	0.607	0.59	0.58
OTHERS	2.593	2.662	2.508	2.554	2.58	2.60
EXPORTS						
WORLD TOTAL	8.068	8.375	6.619	7.797	8.38	8.43
USA	2.821	2.968	2.887	2.621	3.49	3.41
INDIA	0.960	1.530	0.515	1.390	1.09	1.10
UZBEKISTAN	0.980	0.900	0.630	0.820	0.82	0.78
CFA ZONE	0.924	0.595	0.467	0.554	0.57	0.57
AUSTRALIA	0.465	0.265	0.261	0.461	0.50	0.51
BRAZIL	0.283	0.486	0.596	0.433	0.52	0.65
IMPORTS						
WORLD TOTAL	8.144	8.393	6.523	7.747	8.38	8.43
CHINA	2.306	2.511	1.523	2.374	3.03	3.23
EAST ASIA & AUSTRALIA	1.899	1.860	1.665	1.874	1.88	1.91
EUROPE & TURKEY	1.340	1.081	0.861	1.155	0.98	0.98
PAKISTAN	0.502	0.851	0.417	0.337	0.39	0.30
CIS	0.322	0.271	0.239	0.219	0.20	0.19
TRADE IMBALANCE 1/ STOCKS ADJUSTMENT 2/	0.076 -0.171	0.018 -0.100	-0.096 -0.102	-0.050 -0.010	0.00 -0.01	0.00 0.00
ENDING STOCKS						
WORLD TOTAL	12.792	12.231	11.868	8.965	9.08	9.97
CHINA	3.653	3.321	3.585	2.937	2.92	3.24
USA	2.064	2.188	1.380	0.653	0.52	0.57
ENDING STOCKS/MILL USE (%)						
WORLD-LESS-CHINA 3/	58	57	58	41	41	44
CHINA 4/	34	30	39	30	29	32
COTLOOK A INDEX 5/	59.15	72.90	61.20	77.54	89*	

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's ending stocks divided by World-less-China's mill use, multiplied by 100.

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

5/ U.S. cents per pound.

* The price projection for 2010/11 is based on the ending stocks/consumption ratio in the world-less-China in 2008/09 (estimate), in 2009/10 (estimate) and in 2010/11 (projection), on the ratio of Chinese net imports to world imports in 2009/10 (estimate) and 2010/11 (projection).

95% confidence interval: 76 to 106 cents per pound.

STATEMENT OF THE 69th PLENARY MEETING

“Cotton Industry Growth Through Global Unity”

Report of the Committee on Cotton Production Research

The International Cotton Advisory Committee (ICAC) met in Lubbock, Texas, USA during September 21-25, 2010 for its 69th Plenary Meeting since the establishment of the Committee 71 years earlier. Nearly four hundred people attended the meeting, including representatives from 39 governments and 9 international organizations. The Committee welcomed the Government of Mozambique as its newest member. The theme of this Plenary Meeting laid emphasis on unity and aptly summarized the need to ensure that the common interests of all stake holders in the cotton value chain, including farmers, ginner, traders, textile mills and consumers, are adequately addressed.

1. The Committee on Cotton Production Research of the ICAC organized a Technical Seminar on the topic “How to Lower the Cost of Cotton Production.” Papers were presented by experts from countries with large, capital intensive, leading-technology farming systems (Brazil, Turkey, USA), small-holder production systems (Zambia), and in countries in which production is constrained by heavy pest pressure (Pakistan). While there is the potential to achieve large increases in yields, the rising cost of cotton production is a major concern to all cotton producers.

1.1. Cotton is grown in four regions in Turkey, and there are significant differences in the cost of production among the regions. The average cost of production is high in Turkey because of high costs for land, labor, fuel and other inputs.

1.2. Cotton production in the USA utilizes high technology farming systems, thus requiring different approaches to lower costs. Among the technologies available is an autopilot, using the GPS, which guides a machine through a field according to a predefined line. Autopilot can be used with a sprayer, harvesting equipment or only at the time of cultivation. The system enables an operator to work more productively. The automatic boom control and the planter swath control also use the global positioning system and saves inputs by avoiding overlap when spraying insecticides, herbicides and foliar chemicals. With these systems, nozzles automatically stop if an area or row has already been sprayed, and the nozzle will automatically open when an unsprayed area or row begins. Dividing farms into management zones also allows a grower to save on inputs while raising yields.

1.3. Brazil has 215 million hectares of arable land, out of which 70% is suitable for agriculture, cattle, pasture and renewable energy exploration. Cotton occupies about one million hectares, most in the central west part of the country. Brazilian farmers have the highest level of recycling and correct disposal of agricultural packaging in the world. Employees get housing, are trained in accident prevention and work safety, and they are provided on-the-job training. Brazil is struggling to lower production costs through rational use of biotechnology and other inputs, with the ultimate objective of minimizing the environmental impact of cotton production.

1.4. The main reasons for high costs of production in Zambia are poor rural infrastructure, the high cost of inputs, minimal mechanization, low use of inputs and the lack of incentives to invest in cotton production. These factors are common in Africa. Zambia is striving to lower the cost of production by improving soil fertility, by encouraging the use of IPM, through the promotion of low cost agricultural products, the promotion of labor saving farm machinery, the use of herbicides instead of manual labor, and through better harvest management.

1.5. Pakistan is focused on lowering production costs by optimizing input use and farming operations. Cotton growers in Pakistan generally have a sound understanding of cotton production technology, but yields are limited due to the cotton leaf curl virus and mealy bug. Researchers have contained both problems while limiting increases in the cost of production. Farmers in Pakistan enhance nitrogen fertilizer use efficiency by 15% by splitting nitrogen applications in consonance with crop growth. Foliar applications of urea at the rate of 2% saves from having to apply much higher doses of urea through soil applications. Pakistan is quickly shifting from flat planting toward planting on furrow-beds to save irrigation water. Pakistan adopted thresholds for the application of insecticides decades ago. However, frequent increases in energy costs are affecting the cost of production.

2. The ICAC supports four regional networks, and also cooperates with the African Cotton Association, in order to facilitate communication among cotton researchers. Since the 68th Plenary Meeting held in South Africa in September 2009, the 11th Meeting of the Latin American Association for Cotton Research and Development (ALIDA) was held in Argentina in June 2010. 140 participants from Argentina, Brazil, Colombia and Paraguay attended the meeting, along with the ICAC Secretariat and invited speakers from Australia and the USA. Countries presented reports on production prospects and the status of breeding and biotechnology research in their countries. Mr. Bonacic Ivan Kresic of Argentina was elected President of ALIDA. Paraguay agreed to host the next meeting of ALIDA in 2012.

3. Lowering the cost of cotton production is a complex challenge, and there is no easy solution appropriate for all cotton production systems. Labor costs are increasing even in developing countries. Mechanization and herbicide use are solutions that could be encouraged by governments in collaboration with the private sector and cotton producers. Biotech cotton can help to lower the cost of production in some cases, but it is not appropriate in all cotton production systems. Efficient input use and proper management of cropping systems must not be ignored in any cotton production system for lowering the cost of cotton production.

4. Biotech cotton is grown on over half of world cotton area, but only 11 countries have commercialized biotech cotton so far, although many more are considering adoption. Some member countries expressed the need to exchange information about biotechnology, and therefore it was decided to organize a round table for biotechnology in cotton, in which all member countries may participate.

5. The Committee on Cotton Production Research of the ICAC decided to hold the 2011 Technical Seminar on the topic “**Technological Innovations for Sustainable Development of the Cotton Value Chain.**”

MEMBER GOVERNMENTS

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

Заявление 69-го пленарного заседания

«Рост хлопковой промышленности путём создания глобального единства»

С 21 по 25 сентября 2010 г. в г.Лаббоке, шт. Техас, США, состоялось 69-е пленарное заседание учреждённого 71 год тому назад Международного консультативного комитета по хлопку. В заседании приняли участие около 400 человек, в т. ч. представители 39 правительств и 9 международных организаций. Комитет приветствовал правительство Мозамбик в качестве своего нового члена. В теме данного пленарного заседания был сделан особый упор на единство, и она отобразила необходимость адекватного рассмотрения общих интересов всех участников хлопковой цепи производства, включая фермеров, джилирующие предприятия, агентов по торговле, текстильные фабрики и потребителей.

1.1. Секретариат сообщил, что в 2010-11 г. ожидается подъём мирового хлопкопроизводства на 16% благодаря значительному повышению хлопковых цен в течение прошлого сезона. Промышленное использование хлопка также восстанавливается после крутого спада во время глобальной рецессии, причём наблюдается подъём мировой торговли хлопком в результате увеличения потребления. По оценкам Секретариата, средние цены на хлопок в текущем сезоне будут находиться на самом высоком уровне с 1994-95 г. Тем не менее Секретариат предупредил, что предварительные прогнозы на следующий сезон (2011-12 г.) свидетельствуют о возможном расширении запасов, что приведёт в конечном счёте к снижению цен на хлопок.

1.2. Комитет отметил, что некоторые страны были особо озабочены риском, связанным с колебанием цен, для производителей, джилирующих предприятий, торговых агентов и текстильных фабрик. Комитет рекомендует, чтобы касающиеся цен вопросы по-прежнему были в центре внимания исследований МККХ и сбора данных. Комитет признал необходимость расширения диалога между хлопкопроизводителями и хлопкопотребителями для улучшения данных, получаемых с хлопкового рынка, и его прозрачности.

2.1. МККХ одобрил определение ООН относительно устойчивости как развития, которое удовлетворяет существующим требованиям без нарушения возможности будущих поколений удовлетворять свои нужды. Правительства-члены отметили, что хлопкопроизводители за последние два десятилетия достигли больших успехов в деле улучшения экологических и социальных характеристик устойчивости путём использования новых технологий и совершенствования методов управления.

2.2. Комитет заслушал доклад Группы экспертов по социальным, экологическим и экономическим характеристикам хлопкопроизводства (СЭЭХ) относительно использования пестицидов в хлопке, что является общей озабоченностью в любое время, когда обсуждается тема устойчивости выращивания хлопка. Согласно СЭЭХ, несмотря на то, что мировое производство увеличилось вдвое, доля хлопка в объёме глобального потребления пестицидов с 11% в 1988 г. упала до 6,2% в 2009 г. СЭЭХ разработал восемь рекомендаций, которые относились к вопросу использования пестицидов в хлопке и были полностью приняты МККХ.

1. Пестициды класса 1 по вредности в соответствии с классификацией Всемирной организации здравоохранения должны быть отменены в странах, где нет адекватных положений их управления.
2. Страны-производители, в которых использование пестицидов, а не гербицидов, больше 1 кг активного ингредиента на гектар, должны анализировать и рассматривать причины такого использования.
3. Использование активных ингредиентов, на которые приходится самое большое воздействие по отношению к экологической токсичной нагрузке, следует свести к минимуму с целью снижения уровня экологической опасности для водных организмов и пчёл.
4. Пестициды, способные вызывать риск для новорожденных детей или детей грудного кормления, должны быть выведены из системы хлопкопроизводства.
5. Правительства при поддержке всех заинтересованных участников хлопкового сектора должны прилагать все усилия для содействия развитию современных методов управления при защите растений, а также снижения зависимости от пестицидов и последующего риска для окружающей среды и здоровья человека.
6. Правительства должны рассматривать риски для окружающей среды и здоровья человека при одновременном определении чётких политических тенденций, относящихся к снижению риска от использования пестицидов.
7. Правительства должны содействовать сбору надёжных данных, относящихся к определённому урожаю, касающихся использования пестицидов.
8. Должны проводиться последующие исследования оценки риска.

Кроме того, Комитет чётко обозначил необходимость продолжения работы СЭЭХ.

2.3. Комитет заслушал доклад Секретариата, в котором указывалось, что на мировую хлопковую промышленность пагубно влияют неточные, преувеличенные или искажённые утверждения о потере, злоупотреблении и вреде, которые связаны с хлопкопроизводством. Было отмечено, что хлопковая индустрия десятилетиями реагирует на обоснованные озабоченности путём осознания необходимости улучшения работы по составлению прагматических подходов и содействию принятию современных методов. Комитет согласен с тем, что имеются обоснованные озабоченности, связанные с методами хлопкопроизводства, которые нуждаются в улучшении. Тем не менее нужно противостоять тем людям, которые демонизируют хлопковую промышленность для достижения коммерческих целей, причём Комитет поручил Секретариату работать совместно с Постоянным Комитетом, Консультативной группой частного сектора, Международным форумом рекламирования хлопка и промышленными организациями с целью предоставления основанной на фактах информации о работе хлопковой индустрии.

2.4. Комитет заслушал доклад Консультативной группы частного сектора (КГЧС) о фитосанитарных требованиях для хлопка, подлежащего внешней торговле. Комитет согласен с КГЧС, что Секретариату следует предоставить дополнительную информацию о фитосанитарных требованиях, предъявляемых к торговле хлопком. Комитет поручил Секретариату работать вместе с Постоянным Комитетом для поощрения всех стран к принятию гармоничных фитосанитарных требований при торговле хлопком.

2.5. Кроме того, председатель КГЧС сообщил, что члены группы благодарны за проведение всех инициатив, нацеленных на улучшение современных методов хлопкопроизводства. Однако КГЧС выразил озабоченность деятельностью некоторых участников розничной торговли и других лиц в цепи производства, которые используют программы, предназначенные для улучшения методов производства, в качестве средства общественных связей для достижения конкурентного преимущества. Комитет поручил Секретариату составить глоссарий терминов и список участников многих и различных программ и инициатив, работающих в направлении улучшения современных методов хлопкопроизводства.

2.6. Комитет отметил, что «устойчивое» производство и «органическое» производство не являются синонимами, причём многие системы хлопкопроизводства, начиная с крайне капиталоемких и кончая чрезвычайно трудоёмкими, могут быть устойчивыми. Органическое производство представляет собой один вариант устойчивого производства. Комитет согласился с тем, что сессия, посвящённая производству органического хлопка, будет проведена на 70-м пленарном заседании.

3.1. Комитету сообщили, что термин «хлопковые технологии» сегодня часто относится к «трансгенным технологиям» и что трансгенный хлопок в настоящее время используется повсюду, что позволяет учитывать желаемые характеристики, которые в противном случае не были бы в наличии, путём передачи генного пула для селекционирования хлопка другим видам. Учёные отметили, что маркеры ДНК позволяют обычным селекционерам в значительной степени улучшить разницу нахождения благоприятных рекомбинантов для таких характеристик, присущих в количественном отношении, как урожайность и качество волокна. В странах, где используется механическое трепание, одним из наилучших методов исследования хлопка за последние десятилетия была разработка трепальных машин, оснащённых системами электронного взвешивания, что привело к возможности улучшения отбора в программах селекционирования. В настоящее время селекционеры пользуются индексом под названием «счёт качества» для размещения шести качественных параметров волокна в одно измерение, помогая таким образом дальнейшему выбору программ селекционирования.

3.2. Комитету сообщили, что биотехнология является важным средством улучшения стойкости хлопка путём уменьшения внесения инсектицидов. Также было отмечено, что некоторые страны, в которых не используются трансгенные хлопковые семена, также достигли высокой урожайности при использовании лишь минимального количества инсектицидов. Кроме того, у некоторых стран вызывает озабоченность тот факт, что высокая стоимость трансгенных хлопковых семян и ужесточение требований управления технологией и техническими знаниями, передаваемых от компаний по производству семян фермерам, представляет собой потенциальную угрозу экономической жизнеспособности хлопкопроизводства в этих странах.

3.3. Правительства отметили дороговизну разработки многих возникающих технологий, которые окажут влияние на структуру мировой хлопковой промышленности. Несколько членов МККХ поддержали идею создания международного

научно-исследовательского центра по хлопку (МИЦХ), о чём говорилось на 68-м пленарном заседании в 2009 г. Многие правительства до сих пор считают, что международный научно-исследовательский центр по хлопку может снизить стоимость производства путём применения инновационных технологий и ускорения развития исследований в области хлопкового хозяйства. МИЦХ может расширить масштабы принятия хлопковой технологии путём улучшения координации мероприятий. Комитет отметил, что Постоянному Комитету надлежит подготовить доклад для рассмотрения на следующем пленарном заседании.

3.4. МККХ сообщили, что использование термина «натуральные волокна» в хлопковой промышленности ставится под сомнение из-за применения генетической инженерии более чем в половине всего произведенного хлопка. МККХ согласен с тем, что волокно, произведенное из хлопковых растений, представляет собой «натуральное волокно» вне зависимости от методологии производства или технологии семян.

4.1. Секретариат сообщил, что выделяемые хлопковой промышленности субсидии в совокупности составляли в 2009-10 г. 3,5 миллиардов долларов – спад против 6,2 миллиардов долларов в 2008-09 г. В 2009-10 г. 7 стран выдавали субсидии, причём средние субсидии составляли 13 центов за фунт, что меньше 9 стран, которые в 2008-09 г. в среднем предоставляли субсидии равные 14 центам за фунт. Секретариат отметил, что такие субсидии искажают мировое хлопковое хозяйство, и многие страны призвали к их немедленной отмене. В докладе были указаны ограничения, относящиеся к прямой поддержке производства, защите границ, субсидиям по страхованию урожая, механизмам поддержки минимальных цен и экспортным субсидиям.

4.2. Комитет подтвердил насущную необходимость амбициозного и сбалансированного завершения Дохийского раунда переговоров, с особым упором на аспекты развития. Комитет призвал все страны-члены ВТО способствовать сбалансированному и амбициозному завершению Дохийского раунда переговоров путём консультаций, проявления гибкости и достижения компромисса. Члены МККХ подтвердили, что хлопок является неотъемлемой частью повестки дня Дохийских переговоров по развитию и что не может быть какого-либо окончания этой повестки дня без принятия решения относительно хлопка. Члены ВТО согласились, что к хлопку будут относиться внимательно, быстро и специфически в рамках проводимых общих переговоров по сельскому хозяйству.

4.3. Комитет согласился с тем, что странам следует избегать использования протекционистских мер в тесно интегрированном хлопковом хозяйстве. Члены МККХ понимают, что такие меры приводят к неуверенности, непостоянству и искажениям при торговле хлопком.

Благодарность Соединённым Штатам Америки за гостеприимство. Комитет поблагодарил народ, правительство и хлопковое хозяйство Соединённых Штатов за их гостеприимство и отличную организацию 69-го пленарного заседания. Члены МККХ отметили, что со дня создания Комитета в 1939 г. в США было проведено 17 пленарных заседаний МККХ, причём мы благодарны этой стране за её обязательства принятия единых действий в деле осуществления общих целей в рамках мировой хлопковой промышленности.

Будущие пленарные заседания. 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, Египет, Замбия, Зимбабве, Израиль, Индия, Иран, Испания, Италия, Казахстан, Камерун, Кения, Китай (Тайвань), Колумбия, Кот-д'Ивуар, Мали, Мозамбик, Нигерия, Нидерланды, Пакистан, Польша, Республика Корея, Россия, Сирия, США, Судан, Танзания, Того, Турция, Уганда, Узбекистан, Франция, Финляндия, Чад, Швейцария, ЮАР.

ЗАЯВЛЕНИЕ 69-го ПЛЕНАРНОГО ЗАСЕДАНИЯ

«Рост хлопковой промышленности путём создания глобального единства» Комитет по исследованию хлопкопроизводства

С 21 по 25 сентября 2010 г. в г.Лаббоке, шт. Техас, США, состоялось 69-е пленарное заседание учреждённого 71 год тому назад Международного консультативного комитета по хлопку. В заседании приняли участие около 400 человек, в т. ч. представители 39 правительств и 9 международных организаций. Комитет приветствовал правительство Мозамбик в качестве своего нового члена.

1. Комитет МККХ по исследованию хлопкопроизводства провёл технический семинар на тему «Методы снижения стоимости хлопкопроизводства». Были представлены доклады, подготовленные экспертами из крупных капиталоемких стран, обладающих высокотехнологичными системами ведения сельскохозяйственных работ (Бразилия, Турция, США), стран с небольшими производственными системами (Замбия) и стран, в которых производство ограничено из-за сильного давления вредителей (Пакистан). Хотя существует потенциальная возможность достижения крутого повышения урожайности, одной из главных озабоченностей всех хлопкопроизводителей является повышение стоимости хлопкопроизводства.

1.1. В Турции хлопок выращивают в 4-х регионах, причём в каждом из них наблюдается существенное различие в стоимости производства. Средняя стоимость производства в Турции высокая из-за высокой стоимости земли, труда, топлива, сельхозтехники и химикатов.

1.2. В хлопкопроизводстве США используются высокотехнологичные фермерские системы, при которых требуются различные подходы к сокращению затрат. Среди новых технологий нужно отметить автопилот, применяющий глобальную навигационную систему, который даёт указания направления движения механизма по всему полю в соответствии с заранее обозначенной линией. Автопилот можно использовать вместе с разбрызгивающим и уборочным оборудованием или только во время процесса выращивания. Данная система позволяет оператору работать более продуктивно. В процессе автоматического управления штангой и рядовой жаткой сажалки также используется глобальная навигационная система, которая позволяет сэкономить сельхозтехнику и химикаты путём избежания накладок при распылении инсектицидов, гербицидов и листовых химикатов. В этих системах сопла автоматически останавливаются, если какая-либо площадь или ряд уже были опрысканы, и автоматически открываются, если начинаются неопрысканные площади или ряд. Разделение ферм на зоны управления также позволяет хлопководам сэкономить на сельхозтехнике при повышении урожайности.

1.3. В Бразилии насчитываются 215 миллионов гектар пахотной земли, из которых 70% пригодны для сельского хозяйства, разведения крупного рогатого скота, для пастбищ и исследования возобновляемых источников энергии. На хлопок приходится примерно 1 миллион гектар, большинство из которых расположены в центрально-западной части страны. Бразильские фермеры достигли самого высокого в мире уровня повторного использования материалов и правильной утилизации сельскохозяйственной упаковки. Работникам выдают жильё, их обучают методам предотвращения аварий и обеспечения безопасной работы, а также предоставляют обучение без отрыва от производства. Бразилия старается снизить производственные затраты путём разумного применения биотехнологии и другой сельхозтехники, причём конечная цель заключается в минимизации экологического воздействия хлопкопроизводства.

1.4. Основная причина высокой стоимости производства в Замбии заключается в плохой инфраструктуре сельской местности, высокой стоимости сельхозтехники и химикатов, минимальной механизации, слабом использовании сельхозтехники и отсутствии инициатив, направленных на инвестирование в хлопкопроизводство. Такие факторы являются общими во всей Африке. Замбия стремится снизить стоимость производства путём улучшения плодородия, содействия использованию комплексных методов борьбы с вредителями, рекламирования недорогих сельскохозяйственных продуктов, развития сберегающих труд фермерских механизмов, использования гербицидов вместо ручного труда и улучшения методов уборки урожая.

1.5. Основное внимание в Пакистане уделяется снижению производственных затрат путём оптимизации использования сельхозтехники и фермерских работ. Хлопкоробы Пакистана обычно имеют чёткое понятие о технологии хлопкопроизводства, но урожайность ограничена из-за вируса скручивания листьев и нашествия червецов. Учёным удалось победить эти две проблемы при ограниченном повышении стоимости производства. Пакистанские фермеры увеличивают уровень эффективности использования азотных удобрений на 15% путём разделения внесения азота в период роста урожая. Лиственное внесение мочевины в пропорции 2% позволяет не вносить гораздо более высокие дозы мочевины в почву. Для экономии поливной воды Пакистан быстро переходит от плоского посева к посеву на бороздковых грядках. Пакистан принял пороги внесения инсектицидов десятки лет тому назад. Тем не менее на себестоимость производства влияет частое увеличение стоимости энергоносителей.

2. МККХ поддерживает 4 региональные сети и также работает совместно с Африканской хлопковой ассоциацией для улучшения коммуникации между исследователями хлопковой промышленности. После проведения 68-го пленарного заседания, которое состоялось в Южной Африке в сентябре 2009 г., в Аргентине в июне 2010 г. прошла 11-я встреча Латиноамериканской ассоциации по хлопку и развитию (ЛААХР), в которой приняли участие 140 представителей из Аргентины, Бразилии, Колумбии и Парагвая, а также Секретариат МККХ и приглашённые докладчики из Австралии и США. Были представлены страновые доклады о перспективах производства и состоянии селекционирования и биотехнологичных исследований в указанных странах. Президентом ЛААХР был избран г-н Бонасис Иван Кресик. Парагвай выразил согласие организовать следующую встречу ЛААХР в 2012 г.

3. Снижение стоимости хлопкопроизводства - это сложная проблема. Нет её простого решения, приемлемого для всех хлопкопроизводящих систем. Стоимость труда увеличивается даже в развивающихся странах. Механизация и использование гербицидов являются теми решениями, которые могут поощрять правительства совместно с частным сектором и хлопкопроизводителями. Биотех-хлопок может в некоторых случаях помочь снизить стоимость производства, но он не соответствует всем хлопкопроизводящим системам. Эффективное использование сельхозтехники и химикатов и надлежащее управление системами стрижки не должны игнорироваться в любой хлопкопроизводящей системе для снижения стоимости хлопкопроизводства.

4. Биотех-хлопок выращивают на свыше половины мировых площадей под хлопчатником, но до сих пор лишь в 11 странах коммерциализировали биотех-хлопок, хотя многие другие страны рассматривают возможность его принятия. Некоторые страны-члены Комитета выразили необходимость обмена информацией о биотехнологии, и поэтому было принято решение организовать «круглый стол» по вопросам биотехнологии в хлопке, в котором могут принимать участие все страны-члены.

5. Комитет по исследованию хлопкопроизводства решил провести технический семинар в 2011 г. на тему «Технологические инновации для устойчивого развития цепи производства».

Страны-члены Комитета

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

3- إن تخفيض تكاليف إنتاج القطن هو تحدي معقد و لا توجد هناك حلول سهلة مناسبة لأنظمة إنتاج القطن. و تكاليف العمالة أخذة في الازدياد حتى في الدول النامية. والميكنة واستعمال مبيدات الأعشاب هما الحلول التي يجب تشجيعها من قبل الحكومات بالتعاون مع القطاع الخاص و منتجي القطن. و قطن البيوتك يمكن له أن يساعد في تخفيض أسعار الإنتاج في بعض الحالات و لكنه غير مناسب لكل أنظمة إنتاج القطن. كذلك فإن الاستعمال الكفؤ للمدخلات والإدارة الصحيحة لأنظمة الزراعة يجب أن لا تُغفل في أي من أنظمة إنتاج القطن من أجل تخفيض تكاليف الإنتاج.

4- يُزرع قطن التكنولوجيا الحيوية - البيوتك - في مساحة تزيد عن نصف المساحات المزروعة في القطن في العالم. ولكن أحد عشر دولة فقط طرحت قطن البيوتك تجاريا إلى الآن على الرغم من أن دولا كثيرة أخرى تنتظر في أمر تبنيها. هذا وقد أعربت بعض الدول الأعضاء عن الحاجة إلى تبادل المعلومات الخاصة بالتكنولوجيا الحيوية ولذلك اتخذ قرار بتنظيم مائدة مستديرة حول التكنولوجيا الحيوية في القطن من الجائز أن تساهم فيها كل الدول الأعضاء.

5- قررت لجنة الأبحاث الخاصة بإنتاج القطن التابعة للجنة الاستشارية الدولية للقطن (ICAC) أن تعقد ندوة خاصة بالتقنية لسنة 2011 تحت عنوان " ابتكارات التكنولوجيا لتنمية مستدامة في تسلسل القيمة في مراحل إنتاج القطن".

الدول الاعضاء:

الأرجنتين، استراليا، البلجيك، البرازيل، بركينا فاسو، الكمرون، تشاد، الصين (تاوان)، كولومبيا، ساحل العاج، مصر، فنلندا، فرنسا، ألمانيا، اليونان، الهند، إيران، إسرائيل، إيطاليا، كازاخستان، كينيا، جمهورية كوريا، مالي، موزنبيق، هولندا، نيجيريا، باكستان، بولندا، روسيا، إفريقيا الجنوبية، اسبانيا، السودان، سويسرا، سوريا، تنزانيا، توغو، تركيا، أوغندا، الولايات المتحدة، أوزباكستان، زامبيا، زيمبابوي.

3-1 يوجد في البرازيل 215 مليون هكتار من الأراضي الصالحة للزراعة منها 70% أراضي تصلح للزراعة و تربية المواشي و توفير المراعي و استكشافات في مجالات الطاقة المتجددة. والقطن يحتل حوالي مليون هكتار معظمها يقع في القسم الأوسط الغربي في تلك البلاد. والمزارعون البرازيليون يحتلون أعلى المستويات في إعادة تدوير الاستعمال و طرق التخلص الصحيحة من الأغلفة الزراعية في العالم. والعاملون يحصلون على إسكان و هم مدربون في مجالات الحد من وقوع الحوادث العرضية و في أمور السلامة في العمل، كما أنهم يعطون تدريبات أثناء العمل. و لكن البرازيل تكافح من أجل تخفيض تكاليف الإنتاج من خلال الاستخدام الرشيد للتكنولوجيا الحيوية و غيرها من المدخلات التي تهدف في النهاية إلى التقليل من الأثر البيئي الناجم عن إنتاج القطن.

4-1 إن الأسباب الرئيسية لأسعار الإنتاج المرتفعة في زامبيا هي البنى التحتية الضعيفة في المناطق الريفية و ارتفاع تكاليف المدخلات، و الميكنة القليلة و انخفاض استعمال المدخلات وانعدام الحوافز للاستثمار في إنتاج القطن. هذه العوامل كلها تعتبر أمورا شائعة في إفريقيا. أما زامبيا فإنها تسعى حثيثا إلى تخفيض تكاليف الإنتاج و ذلك بتحسين خصوبة التربة وتشجيع استعمال وسائل الإدارة المتكاملة للحشرات المزعة من خلال الترويج للمنتجات الزراعية المنخفضة الأسعار و كذلك تشجيع الآلات التي توفر العمالة، و استخدام مبيدات الأعشاب بدلا من العمالة اليدوية ومن خلال إدارة أفضل للحصاد.

5-1 ركزت الباكستان على تخفيض تكاليف الإنتاج بالاستخدام الأمثل للمدخلات و تشغيل المزارع. إن مزارعي القطن في الباكستان يتمتعون بصورة عامة بفهم سليم لتكنولوجيا إنتاج القطن و لكن الغلات محدودة بسبب آفة تجدد أوراق نبات القطن و بفعل البقعة المغبرة. ولقد تمكن الباحثون من احتواء المشكلتين و الحد من زيادات في تكلفة الإنتاج. أما المزارعون في باكستان فإنهم يكثر من استخدام أسمدة النيتروجين بحيث ترفع كفاءتها بنسبة 15% وذلك بتقسيم تطبيقات النيتروجين بالتواء مع النمو في المحاصيل. و تطبيقات مادة اليوريا بنسبة 2% على أوراق النباتات تقلص ضرورة جرعات أعلى من اليوريا من خلال التربة. هذا و أخذت الباكستان في التحول بسرعة من الزراعة في مسطحات مبسوطة إلى الزراعة في أخاديد ضمن أحواض لتوفير مياه الري. كما أن الباكستان كانت تبنت معايير لتطبيق مبيدات الحشرات قبل عقود.

2- تدعم اللجنة الاستشارية الدولية للقطن (ICAC) أربع شبكات إقليمية وتتعاون أيضا مع رابطة القطن الأفريقية من أجل تسهيل الاتصالات بين الباحثين في مجال القطن. فمنذ انعقاد الاجتماع العمومي الثامن و الستين في أفريقيا الجنوبية في سبتمبر (أيلول) سنة 2009، جرى انعقاد الاجتماع الحادي عشر لرابطة دول أمريكا اللاتينية للقطن وتطويره (ALIDA) في الأرجنتين في يونيو (حزيران) سنة 2010. واشترك في الاجتماع 140 شخصا من الأرجنتين و البرازيل وكولومبيا و باراغواي بالإضافة إلى الأمانة العامة للجنة الاستشارية الدولية (ICAC) و خبراء مدعويين من استراليا و الولايات المتحدة الأمريكية. و قدمت تلك الدول تقارير عن احتمالات الإنتاج ووضعية أبحاث التوليد و أبحاث التكنولوجيا الحيوية فيها. و قد تم اختيار السيد يوناتشيك آيفان كريسيك من الأرجنتين رئيسا لرابطة دول أمريكا اللاتينية للقطن و تطويره (ALIDA). و وافقت باراغواي على استضافة الاجتماع التالي للرابطة في سنة 2012.

اللجنة الاستشارية الدولية للقطن

البيان الختامي للاجتماع العام التاسع و الستين

"نمو صناعة القطن عن طريق الوحدة العالمية"

تقرير اللجنة الخاصة بأبحاث إنتاج القطن

اجتمعت اللجنة الاستشارية الدولية للقطن في لايوك بولاية تكساس في الولايات المتحدة الأمريكية في الفترة بين الحادي العشرين و الخامس و العشرين من شهر سبتمبر سنة 2010 في اجتماعها العام التاسع والستين منذ تأسيس اللجنة قبل 71 سنة. حضر الاجتماع قرابة أربع مائة شخص من بينهم ممثلون من تسع و ثلاثين دولة وتسع منظمات دولية. و رحبت اللجنة بحكومة موزمبيق التي أصبحت أحدث عضو فيها.

1- قامت اللجنة الخاصة بأبحاث إنتاج القطن التابعة للجنة الاستشارية الدولية للقطن (ICAC) بتنظيم ندوة فنية حول الموضوع "كيف يتم تخفيض تكلفة القطن". وقدمت إلى اللجنة أوراق من خبراء من دول فيها نظم زراعية تعتمد على ميزانيات ورؤوس مال ضخمة و أنظمة تكنولوجيا ريادية (البرازيل، تركيا، و الولايات المتحدة) و أيضا من دول يعمل فيها المالكون الصغار (زامبيا) بأنظمة الإنتاج فيها مقيّد بضغوطات كثيفة من آفات الحشرات (الباكستان) وفيما أن هناك احتمال لتخفيف زيادات أكبر في الغلال إلا أن الارتفاع في أسعار إنتاج القطن تظل هماً كبيراً لدى كل منتجي القطن.

1-1 يزرع القطن في أربع مناطق من تركيا وهناك اختلافات ملحوظة في تكلفة الإنتاج في تلك المناطق الأربع. إن معدل الإنتاج مرتفع في تركيا بسبب ارتفاع تكلفة الأراضي و العمالة والوقود و غيرها من الأمور التي تدخل في عملية الإنتاج.

2-1 يستخدم إنتاج القطن في الولايات المتحدة الأمريكية أنظمة زراعية تعمل بتقنيات عالية ولذلك يتطلب طرقاً مختلفة تصب باتجاه تكاليف أدنى . ومن بين الأنظمة المتاحة هناك نظام قيادة آلي يستخدم نظام التموضع العالمي (GPS) في إرشاد آلة عبر حقل بموجب خط يكون قد تم تحديده مسبقاً. ويمكن استخدام نظام القيادة الآلي هذا مع آلة رش، ومعدات الحصاد أو فقط عند وقت الزراعة. و هذا النظام يمكن المُشغّل أن يحقق إنتاجية أعلى. و كذلك فإن نظام التحكم بذراع الرفع الأوتوماتيكي و جهاز التحكم بذراع القص في آلة الزرع كلاهما يستخدمان نظام التموضع العالمي (GPS) أيضا مما يوفر المدخلات بتقادي التداخل عندما يجري رش مبيدات الحشرات ومبيدات الأعشاب والمواد الكيماوية التي ترش على الأوراق. ومع هذه الأنظمة تتوقف فوهات الخراطيم تلقائياً إذا تم رش جهة أو صف أو أنها تنفخ تلقائياً عندما تصل إلى جهة أو صف لم يتم رشه بعد. هذا و ان تقسيم مساحات المزارع إلى مناطق إدارة يسمح أيضا للمزارعين أن يوفرُوا في المدخلات فيما يرفعوا الغلة.

اعضاء اللجنة الاستشارية الدولية للقطن (ICAC) ان القطن هو جزء لا يتجزأ من جدول اعمال الدوحة الخاص بالتنمية و أن تلك الأجندة التنموية لن تكتمل بدون الوصول الى حل لموضوع القطن. هذا وقد وافقت الدول الاعضاء في منظمة التجارة العالمية على ان موضوع القطن سوف يُعالج بصورة مستعجلة بهمة وطموح و بشكل خاص ضمن المفاوضات الشاملة حول موضوع الزراعة.

3-4 وافقت اللجنة على أنه ينبغي على الدول أن تتفادى اتخاذ الإجراءات الحمائية في اقتصاد قطن وثيق الاندماج و التكامل ذلك أن أعضاء اللجنة الاستشارية الدولية للقطن (ICAC) يفهمون أن مثل تلك الإجراءات الحمائية تؤدي إلى عدم اليقين و إلى تقلبات و تشويهاً في تجارة القطن.

تقدير لضيافة الولايات المتحدة الأمريكية:

قدمت اللجنة شكرها للولايات المتحدة الأمريكية حكومة وشعباً ولصناعة القطن فيها و إلى أهالي مدينة لوبوك لحسن ضيافتهم والتنظيم الذي أبدوه لدى استضافتهم الاجتماع العمومي التاسع والستين و ذكرت الدول الأعضاء في اللجنة أن الولايات المتحدة كانت استضافت سبعة عشر اجتماع عمومي للجنة الاستشارية الدولية للقطن منذ تأسيسها سنة 1939 و أن الالتزام الذي تبديه الولايات المتحدة تجاه الأنشطة الموحدة في متابعة الاهداف المشتركة ضمن صناعة القطن العالمية ما هو إلا جدير بالتقدير.

الاجتماعات العمومية في المستقبل: قبلت اللجنة الاستشارية الدولية للقطن بحماس الدعوة التي وجهتها حكومة الأرجنتين لاستضافة الاجتماع العمومي السبعين في العام 2011.

الدول الاعضاء:

الأرجنتين، استراليا، البلجيك، البرازيل، بركينا فاسو، الكمرون، تشاد، الصين (تايبوان)، كولومبيا، ساحل العاج، مصر، فنلندا، فرنسا، ألمانيا، اليونان، الهند، إيران، إسرائيل، إيطاليا، كازاخستان، كينيا، جمهورية كوريا، مالي، موزنبيق، هولندا، نيجيريا، باكستان، بولندا، روسيا، إفريقيا الجنوبية، اسبانيا، السودان، سويسرا، سوريا، تنزانيا، توغو، تركيا، أوغندا، الولايات المتحدة، أوزباكستان، زامبيا، زيمبابوي.

التي تحققت في العقود الأخيرة كانت في تطوير قاطفات للقطن مجهزة بأنظمة وزن بأساليب الكترونية تمكن تحسين الاختيار من بين برامج توليد السلالات. ويستخدم العاملون في مجال التوليد الآن مؤشرا يدعى مقياس علامات الجودة (quality score) لتجميع ست أطر معيارية لجودة الألياف تعمل في مقياس واحد يزيد من مساعدتهم في الاختيار من بين برامج التوليد.

2-3 أبلغت اللجنة أن التكنولوجيا الحيوية هي أداة قوية لتحسين استدامة إنتاج القطن و دُكر أيضا أن بعض الدول التي لا تستخدم تقاوي القطن المتداخلة جينيا لتحقيق غلال أكثر في الوقت الذي يستخدموا فيه الحد الأدنى من كميات مبيدات الحشرات. بالإضافة لذلك فإن الدول يعترها القلق من التكاليف العالية لتقاوي القطن متقاطع الجينات و من المتطلبات المسهبة لإدارة التكنولوجيا و نقل المعرفة من شركات التقاوي إلى المزارعين كونها تمثل تهديدا لقدرة اقتصاد القطن على البقاء في تلك البلدان.

3-3 أخذت الحكومات علما بان كثيرا من التقنيات الناشئة التي ستؤثر في هيكل صناعة القطن في العالم هي تقنيات تطويرها مكلف. و كانت عدة دول من الدول الأعضاء في اللجنة الاستشارية الدولية للقطن أعربت عن تأييدها لتأسيس مركز دولي لأبحاث القطن أثناء انعقاد الجلسة العمومية الثامنة و الستين في سنة 2009، و كثير من الحكومات ما زالت تعتبر أن مركز الأبحاث هذا بإمكانه تخفيض التكاليف من خلال ابتكارات تكنولوجية و بتسريع تطوير الأبحاث في مجال القطن. و يكون بإمكان مركز الأبحاث أيضا توسيع تبني تكنولوجيا القطن من خلال تنسيق أكبر في الجهود. و ذكرت اللجنة الاستشارية أن اللجنة الدائمة سوف تجهز تقريرا للنظر فيه في الجلسة العمومية التالية.

4-3 أبلغت اللجنة الاستشارية الدولية للقطن (ICAC) أن استخدام المصطلح " ألياف طبيعية " من قبل الصناعات القطنية واجه تحديا بسبب استخدام الهندسة الوراثية في أكثر من نصف إنتاج القطن الكلي. و تتفق اللجنة على أن الألياف المنتجة من نبات القطن هي الياف طبيعية بغض النظر عن اسلوب الانتاج والتكنولوجيا الخاصة بالتقاوى.

1-4 ذكرت الأمانة العامة ان قيمة الدعم للصناعات القطنية بلغت 3,5 مليار دولار للموسم 2010/2009 وهو مبلغ انخفض من 6,2 مليار دولار عن مجموع الدعم للموسم 2009/2008. وقامت سبع دول بتوفير الدعم في الموسم 2010/2009 بقيمة 13 سنتا لكل رطل وبذلك يكون عدد الدول الداعمة قد انخفض من تسع دول كانت قدمت بالمعدل 14 سنتا لكل رطل في الموسم 2009/2008. وأشارت الأمانة العامة إلى أن هذا الدعم يشوّه الاقتصاد العالمي من القطن وان العديد من الدول طالبت بإزالته فورا. ولقد اقتصر التقرير على الدعم المباشر للإنتاج و حماية الحدود و الدعم لتأمين المحاصيل و آليات دعم الحد الأدنى للأسعار و دعم التصدير.

2-4 أعادت اللجنة التأكيد على الضرورة الملحة لخاتمة طموحة ومتوازنة لدورة الدوحة يكون فيها موضوع التنمية هو النقطة الرئيسية التي تتمحور حولها. وقامت اللجنة بتشجيع كل الدول الأعضاء في منظمة التجارة العالمية على المساهمة من أجل توصيل دورة الدوحة الى خاتمة متوازنة و طموحة عن طريق المفاوضات والمرونة والحلول التوفيقية.وبدورهم كرر

3-2 تلقت اللجنة تقريراً من الأمانة العامة يشير إلى أن صناعة القطن في العالم تتعرض لحملة قذح تنطوي على انتقادات غير صحيحة و مبالغ فيها أو ادعاءات مشوهة بأن الصناعة تؤدي إلى الهدر و الإساءة و الأذى من إنتاج القطن. و لقد ذكر أن صناعة القطن ترد على تعبيرات القلق الوجيهة منذ عقود بالاعتراف أن هناك حاجة للتحسن و العمل على تطوير طُرق براغماتية و تشجيع تبني أفضل الممارسات. و وافقت اللجنة على أن هناك قلق و جيه مرتبط بالممارسات في إنتاج القطن و أن هناك حاجة لتحسينات فيها. و لكن هناك حاجة للتصدي إلى الذين ينتقدون صناعة القطن لتحقيق مزايا تجارية، و قامت اللجنة برفع توجيهات إلى الأمانة العامة للعمل مع اللجنة الدائمة و هيئة القطاع الخاص الاستشارية و المنتدى الدولي للترويج للقطن و المنظمات ذات العلاقة بالصناعة من أجل توفير معلومات تقوم على أساس الحقائق فيما يتعلق بأداء صناعة القطن.

4-2 تلقت اللجنة تقريراً من لجنة القطاع الخاص الاستشارية (PSAP) التابعة لها مفاده أن متطلبات في مجال الصحة النباتية تروج في التجارة الدولية. و وافقت اللجنة مع لجنة القطاع الخاص الاستشارية على أنه يتوجب على الأمانة العامة أن تقدم معلومات إضافية عن المتطلبات الخاصة بصحة النباتات المتعلقة بتجارة القطن. كما وجهت اللجنة أن تقوم الأمانة العامة بالعمل مع اللجنة الدائمة لتشجيع كل البلدان على تبني متطلبات متناسقة و منسجمة في مجال الصحة النباتية الخاصة بتجارة القطن.

5-2 بالإضافة إلى ذلك ذكرت لجنة القطاع الخاص الاستشارية (PSAP) أنها تقدر كل المبادرات الهادفة إلى تحسين ممارسات إنتاج القطن. غير أن هذه اللجنة أعربت عن قلقها من بائعي التجزئة و غيرهم في قيمة سلسلة الإنتاج الذين يستخدمون برامج مصممة لتحسين ممارسات الإنتاج كأداة من أدوات العلاقات العامة من أجل الحصول على ميزات تنافسية. فوجهت اللجنة الأمانة العامة بأن تجمع مُسرداً للمصطلحات و قائمة بأسماء المشاركين في كثير من البرامج و المبادرات المختلفة التي تعمل على تحسين ممارسات إنتاج القطن.

6-2 ذكرت اللجنة أن مصطلحي "الإنتاج المستدام" و "الإنتاج العضوي" ليسا مترادفين و أن كثيراً من أنظمة الإنتاج التي تتراوح بين تلك التي تتطلب رأسمال عالي و تلك التي تتطلب عمالة مكثفة يمكن استدامتها. أما الإنتاج العضوي فهو أحد الخيارات لإنتاج مستدام. و وافقت اللجنة على أن جلسة حول إنتاج القطن العضوي يمكن عقدها أثناء الاجتماعات العامة السبعين.

1-3 أبلغت اللجنة أن المصطلح "تقنيات القطن" غالباً ما يشير هذه الأيام إلى تقنيات التنوع الجيني التي تتداخل فيها الجينات transgenic وان الأفطان الناتجة عن هذه التقنيات شائعة هذه الأيام مما يجعل من الممكن إدراج السلالات المرغوبة والتي لا تكون متوفرة بغير هذه الطريقة وذلك بنقل مجموعة الجينات الوراثية لتوليد القطن إلى نوعيات أخرى. وأشار الخبراء في مجال العلوم أن الوسم الوراثي أو الجينة الشفرة DNA Markers توفر القدرة للعاملين في مجال التوليد التقليدي لتحسين احتمالات العثور على مواد موحدة للحمض النووي recombinants للحصول على سلالات تراث سمات توفر قدراً كبيراً من إنتاج الألياف ذات الجودة العالية. أما في البلدان التي تستخدم الآلات في قطف القطن فإن أحد أوجه التقدم في أبحاث القطن

بحسب تقرير لجنة خبراء (SEEP) فإنه بالرغم من أن الإنتاج العالمي تضاعف إلا أن نصيب القطن من حيث قيمة استهلاك المبيدات عالمياً انخفض من 11% في سنة 1988 إلى 6,2% في سنة 2009. و رفعت لجنة خبراء (SEEP) ثمان توصيات حول استخدام المبيدات تم قبولها بالكامل من قبل اللجنة الاستشارية الدولية للقطن (ICAC) وهي كالتالي:

- 1- المبيدات التي صنفها منظمة الصحة العالمية بدرجة خطورة صنف أول يجب إبطال العمل بها في الدول التي لا يوجد فيها قوانين مناسبة لإدارة استعمالها.
- 2- الدول المنتجة للقطن التي تستخدم فيها مبيدات غير التي تستعمل لإبادة الأعشاب بكميات تفوق كيلوغرام واحد من المواد النشطة لكل هكتار يجب أن تقوم بتحليل الأسباب التي تدعو لمثل ذلك الاستعمال ومعالجتها.
- 3- استخدام العناصر النشطة التي تُمثل أعلى نسبة من حمولة السمومية يجب أن تُخفّض إلى الحد الأدنى بغية التقليل من الأخطار البيئية للكائنات العضوية المائية وللنحل.
- 4- المبيدات المعروفة بأنها تُمثل خطراً على الأجنة أو الأطفال الذين يتغذون بالرضاعة يجب أن تلغى من الاستعمال في أنظمة إنتاج القطن.
- 5- الحكومات مع انخراط كل أصحاب المصالح الذين لديهم الاهتمام في قطاع القطن يجب أن يبذلوا جهوداً حثيثة لتشجيع أفضل ممارسات الإدارة في حماية النباتات و تقليل الاعتماد على المبيدات و المخاطر اللاحقة على صحة البيئة و البشر.
- 6- على الحكومات أن تأخذ بعين الاعتبار المخاطر على البيئة و الصحة في الوقت الذي تضع فيه سياسات واضحة من شأنها تقليل الخطورة من المبيدات
- 7- على الحكومات أن تُشجّع على جمع بيانات موثوق بها لكل محصول له علاقة باستعمال المبيدات.
- 8- وجوب إجراء دراسات متابعة لتقييم المخاطر.

بالإضافة إلى ذلك أكدت اللجنة بقوة على أن عمل لجنة الخبراء (SEEP) يجب أن يستمر وأن تقدم دراسات إلى الدول المهمة من بين الدول المنتجة للقطن.

اللجنة الاستشارية الدولية للقطن

البيان الختامي للجلسة العمومية التاسعة والستين

"نمو صناعة القطن من خلال الوحدة العالمية"

اجتمعت اللجنة الاستشارية الدولية للقطن (ICAC) في مدينة لايبزغ بولاية تكساس في الولايات المتحدة في الفترة بين الحادي والعشرين والخامس والعشرين من شهر سبتمبر، أيلول سنة 2010 في جلستها العمومية التاسعة والستين منذ انشاء اللجنة قبل واحد وسبعين سنة. وحضر الجلسة قرابة أربع مائة شخص من بينهم ممثلون عن تسعة وثلاثين حكومة و تسعة ممثلين عن منظمات دولية. ورحبت اللجنة بحكومة موزمبيق التي أصبحت أحدث عضو فيها. إن عنوان هذا الاجتماع العام أكد على الوحدة و لخص بصورة ملائمة الحاجة لضمان المصالح المشتركة لكل من لهم مصلحة في سلسلة القيمة في مراحل الإنتاج بمن فيهم المزارعين و الحالين و التجار و مصانع النسيج و المستهلكين بغية التعامل معها بصورة مناسبة.

1-1 ذكرت الأمانة العامة انه من المتوقع ان يرتفع انتاج القطن في العالم بنسبة 16 % في موسم 2011/2010 مدفوعا بالارتفاع الملحوظ في اسعار القطن خلال السنة الماضية. كما ان استعمال المحالج أخذ في التعافي من الهبوط الحاد الذي عانى منه اثناء الركود العالمي في الوقت الذي ترتفع فيه تجارة القطن العالمية مع ازدياد الاستهلاك. وقدرت الأمانة العامة للجنة الاستشارية الدولية للقطن (ICAC) أن معدل أسعار القطن خلال الموسم الحالي سيصل الى أعلى مستوياته منذ موسم 1995/1994. غير ان الامانة العامة حذرت بان التقديرات الاولى للموسم القادم 2010/ 2011 توحى بان كميات المخزون من القطن سترتفع الامر الذي يؤثر الى انخفاض لاحق في اسعاره.

2-1 أبدت اللجنة قلقها بشكل خاص من الأخطار المتمثلة في تقلبات الأسعار للمنتجين والحالين و التجار ومصانع النسيج و توصي بأن القضايا التي تخص الأسعار يجب أن تظل نقطة المراقبة التي يجب على اللجنة الاستشارية أن تركز عليها و تجمع المعلومات و البيانات عنها. و أدركت اللجنة أن هناك حاجة لتقوية الحوار بين منتجي القطن و مستهلكيه بغية تحسين بيانات سوق القطن و الشفافية.

1-2 أيدت اللجنة الاستشارية الدولية للقطن (ICAC) التعريف الذي قدمته الامم المتحدة لكلمة "الاستدامة" والتي جاء فيه أنها التنمية التي تلبي احتياجات الاوقات الحاضرة دون تقويض قدرة الاجيال القادمة على تلبية احتياجاتهم في المستقبل. كذلك أدركت حكومات الدول الاعضاء بان منتجي القطن قطعوا اشواطاً طويلة في تحسين أبعاد النواحي المتعلقة بالاستدامة البيئية والاجتماعية على مدى العقدين الاخيرين بواسطة استخدام تقنيات جديدة وممارسات محسنة في مجالات الادارة.

2-2 تلقت اللجنة تقريراً من لجنة الخبراء الخاصة بالأداء الاجتماعي و البيئي و الاقتصادي لإنتاج القطن (SEEP) بخصوص استخدام مبيدات الحشرات على القطن الأمر الذي يعتبر قلقاً عاماً كل مرة يجري فيها بحث الاستدامة في زراعة القطن. و

Inauguration

9:00 hrs. Tuesday, September 21, 2010
Mr. Eddie Smith in the Chair

The CHAIR called the meeting to order.

The CHAIR noted that the first order of business was to confirm the membership of the Government of Mozambique in the ICAC. He informed that the Secretariat has received a letter from the Ministry of Agriculture, Government of Mozambique. The Government of Mozambique has an interest in cotton, and the Government is prepared to fulfill the obligations of membership with respect to acceptance of the Rules and Regulations of the ICAC, the provision of information about cotton, and the payment of assessments. He noted that the production of cotton in Mozambique is improving, and the Government of Mozambique is facilitating expansion in the cotton sector through policies and programs designed to improve efficiency and productivity to the benefit of all stakeholders in the value chain. The membership of Mozambique in the ICAC will be highly welcome. There was no opposition and the Plenary Meeting approved the membership of Mozambique in the ICAC. The CHAIR welcomed Mozambique to take its place as a member of the ICAC.

The CHAIR said that the second order of business was to approve the Agenda of the 69th Plenary Meeting. The Provisional agenda was approved by the Standing Committee at its meeting on July 15 and was mailed to all delegations. There were no objections to the Provisional Agenda, and the CHAIR stated that the Agenda was adopted.

The CHAIR invited Dr. Fred Bourland, ICAC researcher of the Year – 2010, to come forward. The CHAIR introduced Dr. Freddie M. Bourland, who received his Masters degree in Plant Breeding from the University of Arkansas in 1974 and a Ph.D. in Genetics from the Texas A&M University in 1978. He worked for Mississippi State University from 1978 to 1988 and became a full Professor. Dr. Bourland joined the University of Arkansas in 1988. His breeding program has released over 70 cotton germplasm lines and cultivars. One cultivar now being released combines exceptional fiber quality with impressive yield and host plant resistance traits. He is the team leader on work to develop a modified plant-mapping program (named COTMAP), a program for summarizing variety test data over multiple states (named COTVAR), and an index of cotton fiber quality (named Q-score). In addition, he was co-leader of a research team that developed COTMAN, an expert cotton management system.

The CHAIR noted that Dr. Bourland's other primary research areas have included conducting

state cotton variety tests in the USA, evaluating and determining inheritance of several seed and seedling vigor parameters, and developing and employing several selection criteria that may be used to enhance host plant resistance and to improve production efficiency via basic yield components. Prior to being named Center Director of the University of Arkansas Northeast Research and Extension Center in 1997, he regularly taught an undergraduate course covering the principles of cotton production, and he taught graduate level genetics courses. He has directed the research of 26 graduate students and has served on over 60 graduate student committees. He has authored (or co-authored) 71-refereed publications, over 265 abstracts and proceedings, and 23 book chapters. Dr. Bourland was presented with a Plaque and was invited to say a few words.

Dr. Bourland thanked Cotton Incorporated, the National Cotton Council of America, colleagues and students at the University of Arkansas for their support and expressed his appreciation for being awarded the ICAC researcher of the year award.

The CHAIR presented his welcoming remarks. He welcomed the participants to the 69th Plenary Meeting of the ICAC, and as the Chairman of the National Council of America (NCC) acknowledged the role of the U.S. cotton industry as one of the world's leaders in both public and private investments in cotton research, development and technology transfer, as well as in cotton promotion and market expansion. He noted that challenges faced by the world's cotton industry require all countries to work together, and the theme of the meeting, Cotton Industry Growth through Global Unity is highly appropriate. The CHAIR pointed to the success of promotional program carried out by Cotton Incorporated and activities in international cotton promotion efforts by Cotton Council International. He praised promotional efforts by the International Forum for Cotton Promotion. He said that other meeting focus areas are of international interest, including increasing efficiency and lowering costs in cotton production, storage, transportation and processing, as well as technological developments. He noted that cotton standardization and trade negotiations are also important topics. As a West Texas producer, he said he appreciated the opportunity to provide participants with a firsthand view of the many facets of this region's cotton industry. He thanked all for participating in this meeting.

The CHAIR introduced Mr. Steve Verett, Executive Vice President of Plains Cotton Growers to present his welcoming remarks. Mr. Verett offered a sincere "big Texas warm-hearted

welcome" to Lubbock to everyone. He noted that Lubbock is the center of the largest cotton patch in the world, where within a 160-kilometer circle around the city of Lubbock, family farmers plant 1.4 million hectares to cotton. Mr. Verett indicated that in 2010 production in the area is estimated at 1.3 million metric tons of cotton lint and 1.88 million metric tons of cottonseed. He noted that farmers here are adopters and creators of new and innovative cotton production technologies, while several research elements of the USDA's Cropping Research Lab are located here, including the Plant Stress and Germplasm Development Unit, the Wind Erosion and Water Conservation Unit, and the Cotton Production and Processing Unit of USDA's Agricultural Research Service. Mr. Verett pointed out that Texas Tech University has its Fiber and Biopolymer Research Institute, Cotton Economics Research Institute and International Cotton Research Center right here, while Texas A&M University has its Research and Extension Center on the north side of Lubbock. He highlighted the importance of cotton breeding, genomics, genetics, water use efficiency, harvesting, processing, textile research, development of high value bio-products from fibers and seed to the economy of this region and the state of Texas. He welcomed participants to the United States, Texas and Lubbock and expressed his hope that innovative research contributes to the theme of the meeting.

The CHAIR introduced the delegate of Burkina Faso, host of the 67th Plenary Meeting, to present his welcoming remarks. The representative said that it was a great honor to host the 67th Meeting in Burkina Faso in 2008, and greeted all delegates to the beautiful city of Lubbock and Texas, the heart of cotton production. The representative, on behalf of all delegates sincerely thanked the government of the U.S. and the private sector for hosting the 69th Plenary Meeting. He noted that the United States is a leader in public and private investments in research in cotton production and promotion, permitting advances in technologies around the world. He noted that the world cotton industry faces many technological, agronomical and economical challenges and in order to find solutions, synergies of all sectors of the world cotton industry are required, making the theme of this plenary meeting very appropriate. He said that he was looking forward to fruitful and beneficial discussions for the benefit of the cotton industry and thanked the organizing committee, authorities and people of Lubbock for hosting the meeting.

The CHAIR introduced Mr. Michael Scuse, Deputy Under Secretary for Farm and Foreign Agricultural Services, USDA to present his

opening remarks. Mr. Scuse welcomed everyone to the United States and the great state of Texas on behalf of the U.S. Department of Agriculture. He said that he is proud to have been appointed by President Obama to help lead USDA's Farm and Foreign Agricultural Services, comprising three agencies that oversee export promotion, crop insurance, and farm programs. He thanked the city of Lubbock and the Lubbock Convention and Visitors Bureau for hosting the meeting. He also thanked the organizing committee and especially Dean Ethridge of Texas Tech University, the National cotton council, the Plains Cotton Growers Association, Cotton Inc., the private sector and sponsors for their support in hosting this event. Mr. Scuse stated that there is a strong commitment across the U.S. government to promote trade. He said that the ICAC plays a critical role in the success of the international cotton market and should be commended for assisting governments in fostering a healthy international cotton economy. He noted that the ICAC raises awareness of emerging issues in the cotton sector and works to solve problems by fostering cooperation among its members. Mr. Scuse indicated that the ICAC expert panels on biotechnology in cotton addressed biosafety issues, potential benefits and challenges for adoption of biotech cotton in the developing world by providing objective, science-based information. The U.S. Government and the U.S. cotton sector strongly value this work and provide support through participation of the industry in the ICAC activities, including the Private Sector Advisory Panel (PSAP), the International Forum for Cotton Promotion and other expert panels. He said that the U.S. government and private sector realize that the global cotton sector must be healthy and growing. Mr. Scuse affirmed that USDA remains strongly committed to maintaining a vibrant international trade system, the United States is committed to concluding an ambitious and balanced result to the Doha Round, and remains dedicated to international development and capacity building. He thanked everyone for participating in the meeting and wished success in the discussion of ways to expand opportunities for cotton worldwide. Mr. Scuse's paper is a statement of the meeting.

The CHAIR introduced Mr. Ahmed Elbosaty, Chair of PSAP, to present his report. Mr. Elbosaty reported on the PSAP activities, which comprises 11 members representing developed and developing countries and also producers, merchants and spinners. He described the role of the PSAP, including to give advice to the ICAC on strategic issues critical to the long-term growth of the cotton industry, matters relating to the format and agenda for each plenary meeting, consideration of the mission of the ICAC, and to explore opportunities for financial support for the ICAC and its activities. He reported that the PSAP met 24 times since its founding in 1999 and two times during the past year, plus four conference calls. He noted that the PSAP has exten-

sively discussed the issue of good trade practices and wished to offer the following observations. Domestic assistance to the cotton and cotton textiles sectors is acceptable if properly structured, but interference with trade is highly damaging to the health of the world cotton industry and harms the interests of all participants in the cotton value chain of all countries, thus encouraging the use of polyester. The PSAP encouraged governments to be aware that internationally accepted rules of trade in cotton require settlement of all contracts. Accordingly, government measures that interrupt the fulfillment of contracts may result in severe financial consequences for the parties involved. The PSAP called on governments to support the principle of contract sanctity. Mr. Elbosaty reported that the PSAP urged countries to harmonize phytosanitary requirements. He said that the PSAP took note of a study by the Secretariat showing great diversity in requirements from country to country. The PSAP has asked the Secretariat to provide additional information on phytosanitary requirements and to work with the Standing Committee to compose a task force on Harmonization of Phytosanitary Requirements for Cotton Import. He reported that the PSAP met with a representative of the Better Cotton Initiative (BCI) in Bremen and Lubbock and that the PSAP appreciated the commitment by the BCI to work collaboratively with all stakeholders in the cotton value chain to mainstream production practices that result in improved outcomes for the environment, farmers and consumers. The PSAP is also aware of other initiatives intended to improve cotton production practices. However, some members of the PSAP look askance at programs that fragment the world cotton market. Mr. Elbosaty reported that Mr. Manfred Schiefer, President of M. Schiefer Trading Company, and Mr. Alois Schönberger, President of Cottonex Ansalt, were elected Chair and Vice Chair of the PSAP for the next year between the plenary meetings. He thanked Mr. Dhiren Sheth of C.A. Galiakotwala & Co. who served as Vice Chair of the PSAP during the past year and all members of the PSAP. He also thanked governments for their support to the cotton industry and Dr. Townsend and the Secretariat for their support. Mr. Elbosaty's report is a statement of the meeting.

The CHAIR introduced Mr. Terry Townsend to give his report as executive director. Mr. Townsend said that cotton and cotton textile industries are central to the economic growth of both developed and developing countries and contribute to sustainable and socially responsible development. Cotton played an important role in industrial development starting in the 18th century and continues to play an important role today in the developing world as a major source of revenue. He noted that despite the positive impacts of cotton and benefits to consumers, cotton is being severely criticized for having negative impacts on the environment and for social abuses, and he said that there are there are

many examples of negative information about the world cotton industry being disseminated by various interest groups. The danger to the industry is that cotton depends on consumer preference to maintain demand. Mr. Townsend suggested that there must be a three-pronged response consisting of 1) listening to allegations and considering appropriate strategies in response to valid concerns, 2) improving cotton's performance through mainstreaming of best practices, and 3) confronting egregious misinformation campaigns and calling to account those who know, or should know, that such allegations are exaggerated or erroneous. For instance, rather than accounting for 25% of all pesticides used worldwide, as is commonly alleged, cotton accounted for 6.2% of world pesticide sales in 2009, down from 11% of sales in 1988.

Mr. Townsend said that the creation of the Private Sector Advisory Panel (PSAP) in 1999 broadened the circle of participation in ICAC meetings, expanded the subject matter expertise available to Member Governments and the cotton industry and helped to ensure that the work of the ICAC is relevant and pragmatic. He pointed out that the Standing Committee created the Task Force on Commercial Standardization of Instrument Testing of Cotton (CSITC) in 2003 following a decision by the 62nd Plenary Meeting in Gdynia, Poland. CSITC Round Trials are conducted among testing laboratories around the world to ensure standardization of test results, and the Round Trials are providing information that can be used in the establishment of commercial tolerances in cotton testing.

He reported that the Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP) was created by a decision of the 65th Plenary Meeting in Goiania, Brazil in 2006. SEEP concentrated during the past year on approval of a consultant's study on insecticide use in cotton and approval of an interpretive summary of the report. Mr. Townsend also expressed his appreciation for the work of the Common Fund for Commodities (CFC) and the European Union in support of the cotton industry. He said that the International Forum for Cotton Promotion (IFCP) is an important organization facilitating demand enhancement. He also thanked the Government of the United States for volunteering to host the 69th Plenary Meeting after the invitation from another country was withdrawn, noting that it had been a great pleasure to work with the Government of the United States and the private sector to prepare for the 69th Plenary Meeting.

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

The CHAIR introduced Ambassador Ali Mchumo, Managing Director of the Common Fund for Commodities (CFC). Ambassador Mchumo thanked the organizing committee for inviting him to the meeting and to make opening

remarks. He noted that the theme of this meeting is a comprehensive call for within-sector collaboration between all players in the value chain. He stated that for the CFC, small producers in developing countries are at the center of attention as they are the ones that require support from the national and international community. He said that millions of smallholder farmers should be supported not by subsidizing their production, but by enabling them to produce their cotton in a sustainable, effective and efficient way, and by paying them prices that are linked to undistorted world market prices. He indicated that in that regard, substantive progress in the consultation on the Cotton Agenda in the framework of the WTO and the Doha Development Round should be sought and secured without further delay. Ambassador Mchumo noted that the Fund supports commodity development activities and works with the ICAC to address challenges faced by cotton producers with a multi-country commodity/cotton focus. He reported that this work has led to building a portfolio of cotton projects valued more than \$50 million with the Fund's contribution of \$22 million, in addition a number of Fast Track Projects have been completed. He emphasized that the ICAC has proven to be an efficient and effective International Commodity Body in terms of developing project proposals, submitting them to the CFC and undertaking supervisory activities during implementation. Ambassador Mchumo expressed his pleasure to work with the ICAC Secretariat in particular with the Executive Director, Mr. Terry Townsend and Mr. Rafiq Chaudhry, the Head of the Technical Information Section. He also highlighted the contribution of the European Union in supporting specific cotton projects in the Fund's overall portfolio. He concluded by emphasizing that cotton will remain an important component of the Fund's project portfolio, and the Fund continues to work with the ICAC on further development of new projects for the benefit of the smallholder producers that depend on cotton production for

their livelihood. Ambassador Ali Mchumo's paper is a statement of the meeting.

The delegate of ARGENTINA thanked the organizing committee for their efforts to organize this meeting. He thanked the CFC for their work to provide support to smallholder farmers. He indicated that smallholder farmers in Argentina and other countries in Latin America are in need of support in order to continue cotton production and to provide livelihood to their families. He once again thanked the Fund for providing assistance to smallholder farmers.

The CHAIR introduced Minister Azmat Ali Ranjha, Chair of the Standing Committee, to present his report. Minister Ranjha, on behalf of the members of the Standing Committee and his country, Pakistan, expressed deep appreciation to the Government of the United States and members of the Organizing Committee for hosting the 69th Plenary Meeting of the International Cotton Advisory Committee. He noted that the theme of the 69th Plenary Meeting "Cotton Industry Growth Through Global Unity" could not have been more appropriate or timely. In times of persisting economic challenges both in the US and around the world, the need for global unity has seldom been more acute or urgent. He said that the Standing Committee had a packed agenda this year and examined a wide ranging and diverse set of issues, from continuing ongoing dialogue with the Better Cotton Initiative (BCI) on issues of shared concern, to receiving updates on significant developments in the Doha Round discussions in Geneva. Minister Ranjha reported that significant emerging trends, such as foreign direct investment in agricultural land in developing countries, the extraordinary volatility in the cotton futures prices, and the changes in the structure of the world cotton industry, are some of the subjects that have remained in the Standing Committee's focus this year.

He informed that the Standing Committee under guidelines issued during the 68th Plenary Meeting

in Cape Town, initiated preliminary work on a proposal to establish an International Research Center for Cotton. He said that the Standing Committee, in consultation with the Executive Director, referred the issue to an expert panel with four international specialists on cotton research, which had only recently submitted its report to the Secretariat. He suggested that considering the importance of the initiative and the quantum of work that still needs to be done at the level of the Standing Committee before a viable set of options can be placed for consideration in a Plenary Meeting, that more time may be allowed for completion of these requirements.

Minister Ranjha informed that the Standing Committee in its 503rd Meeting held in Washington DC on March 10, 2010, unanimously agreed to accept Argentina's gracious invitation to host the 70th Plenary Meeting in Buenos Aires in September 2011. He also reported that the Standing Committee in its 505th Meeting held on May 27, 2010 unanimously endorsed the nominations of Mr. Patrick Packnett of the United States as Chair, Mrs. Lily Munanka of Tanzania as First Vice Chair, and Mr. François Schmidt of Switzerland as Second Vice Chair of the Committee during 2010-11. He also praised the work of the Subcommittee on Budget during the process of development of a consensus on the approval of the ICAC budget. He informed on the continued work on building the ICAC membership. Minister Ranjha expressed sincere appreciation of the excellent secretariat support that the Executive Director, Mr. Terry Townsend and other members of his team provide to the Standing Committee, appreciating their professionalism and commitment to the ICAC's work. He also thanked the US government and the Organizing Committee for the excellent arrangements made for the 69th Plenary Meeting. The Report of the Chairman of the Standing Committee is a statement of the meeting.

The CHAIR adjourned the Inaugural Session of the 69th Plenary Meeting at 10:30 hrs.

First Plenary Session

Past Trade Rounds in the Multilateral Trading System: Are There Lessons for the Doha Round?

15:30 hrs. Wednesday, September 22, 2010
Mr. Bob Riemenschneider in the Chair

The CHAIR invited James D. (Jim) Grueff, Trade Policy Consultant at Decision Leaders, LLC, to present his "Lessons for a Successful Doha Round."

Jim Grueff said he was one of the few persons who were agricultural negotiators in both the Uruguay Round (UR) and the Doha Round (DR). He reminded that the Uruguay Round

Agreement was the first and only multilateral agreement on agricultural trade completed so far. That round lasted eight years but resulted in the development of many important rules regarding agricultural trade. The DR negotiations started in 2001 and he could not offer a reasonable prediction as to its possible completion date. He summarized the key differences between the UR and the DR, in particular the fact that participation from developing countries is much more important in the DR than in the UR, and

that the DR has a "Development Agenda." The main challenges facing the DR include differences in the interpretation of its basic objectives amongst WTO member countries, and an unfavorable negotiating environment. However, he emphasized the necessity to complete the DR in order to ensure the effectiveness and credibility of the WTO, which is an important institution for countries dependent on trade and allows all countries to voice their concerns regarding trade relationships.

Mr. Grueff highlighted some of the lessons learned from the DR, in particular the fact that formal high-level meetings are likely to fail if there has not already been some substantive negotiating progress; concluding the DR is not currently a political priority in many countries; and significant change should take place in order for the DR to be completed. Some of the possible changes with potential positive effects on the DR include changes in the U.S. Congress, the development of the next U.S. farm bill, and an improvement in the global economy. He acknowledged that it will take many more years to complete the DR. He suggested that WTO member countries try to achieve some mutual understanding of the most essential negotiating objectives and political priorities and to discuss this at the political level above the level of senior negotiators. In addition, he recommended a simplification of the objectives for agriculture, and to consider the transnational private sector efforts to educate political leaders regarding the importance of the WTO and the DR. He concluded by noting that, in this topic, the ICAC could try to bring together its members on the issue of cotton. Mr. Grueff's presentation is a statement of the meeting.

The CHAIR thanked Mr. Grueff and invited Darren Hudson, Texas Tech University, to report on his "Lessons for the Future Learned from the Elimination of MFA Quotas."

Dr. Hudson welcomed participants to the 69th Plenary Meeting on behalf of Texas Tech University. He started by recalling the history of Multi-Fiber Arrangements (MFAs): after the Second World War, efforts by some countries to boost their textile industry in order to fuel their economy resulted in efforts by the United States and Europe to protect their own textile sectors, which resulted in the adoption of the Long-Term Agreement (LTA) in 1962. The LTA was later expanded to cover man-made fibers in the Multi-Fiber Arrangement system in 1974. Later, due to mounting concerns from developing countries regarding the rationality of the MFA system, the Agreement on Textiles and Clothing (ATC) implemented during the UR scheduled its progressive elimination, which was finalized in 2005. Dr. Hudson noted that the MFAs had some unintended consequences, including "quota-hopping" and transshipment and false declarations of origination. The MFA elimination was expected to result in a net benefit assuming free trade. However, it did not eliminate all trade restrictions, only bilateral quotas. Changes in the direction of trade flows were well anticipated, but their magnitude was not, and several countries increased their textile exports despite the expectation that these would be damaged. Textile trade grew rapidly after the elimination of high-value quotas in 2002, then more slowly after the final elimination of all quotas in 2005, and remained flat in 2007-2008. The slower than anticipated growth after

2005 was due to special safeguards against China, remaining tariff and preferential trading arrangements, and government support to the textile and clothing industries in a number of countries. Dr. Hudson concluded that some issues in both exporting and importing countries are still preventing textile and clothing trade to be completely free. The trading environment for textile and clothing has moved from bilaterally managed trade to a trading scheme sanctioned by the WTO, but in which preferential treatment of developing countries has led to new distortions. He noted that the main lesson of the MFAs for the DR is that the convolution of the objective of trade barrier reduction and "development" will likely confuse the negotiations. Dr. Hudson's presentation is a statement of the meeting.

The CHAIR thanked Dr. Hudson and introduced Ms. Marième Fall de Perez Rubin, Counsellor, Agriculture and Commodities Division at the WTO, to report on "Past Negotiations and Relevant Lessons for Concluding the Doha Round" on behalf of Mr. Chiedu Osakwe, Director, Accessions Division at the WTO.

Ms. Fall de Perez Rubin thanked the ICAC for helping the WTO Secretariat in accessing data on world cotton production. She noted that Chiedu Osakwe's written statement would be part of the proceedings of the meeting and that her speech would reflect her own views and not those of the WTO. She started by recalling the fate of the International Trade Organization (ITO), which at the end of the 1940s was designed to handle the rules for international trade, but was never formed. Instead, the General Agreement on Tariffs and Trade (GATT) operated temporarily and eventually morphed into the WTO, which now has a membership of 153 countries. In the past, tariffs on traded goods were the major concern of international trade negotiations. As tariffs have declined, other issues regarding international trade have arisen, requiring more complicated negotiations and rules. In addition, over time the number of countries amongst which trade negotiations were discussed grew from a few to more than a hundred. Ms. Fall first highlighted the differences between the Doha Development Agenda (DDA) and past negotiations rounds, including the following: 1) tariffs remain important in many markets, including agriculture, but other more complicated issues such as SPS, TBT, and anti dumping measures, have also become concerns; 2) the number of countries involved in trade negotiations has increased significantly, and all of them have to agree before a decision can be made; and 3) governments have an increasingly better informed and much more active domestic constituency. Furthermore, countries continue to negotiate among themselves and to implement Free Trade Agreements (FTAs) despite the fact that negotiations at the DDA have progressed only slowly; and the modalities that will be agreed upon at the DDA are important but will need to be followed by further negotiations

and the establishment of schedules. She emphasized that there was a strong desire from all WTO members to finalize the DDA and that 80% of the work had already been completed. Mr. Osakwe's report is a statement of the meeting.

The CHAIR thanked Ms. Fall and asked delegates if they had any questions for the panel members.

The delegate of ARGENTINA noted that the Argentinean delegation would have liked to have a representative of developing countries amongst the panel members. He reminded that the theme of the 69th Plenary Meeting was, "Cotton Industry Growth Through Global Unity." He expressed his appreciation of the views of the Panel members and noted that there was ultimately some optimism regarding the DR and international trade. The delegate of Argentina then read excerpts from a statement prepared by the government of Argentina and requested that this statement be included in the proceedings of the meeting. The main points from these excerpts include the following: 1) Argentina's cotton production decreased significantly during the last decade due to the decrease in international cotton prices resulting from distorting policies adopted by some countries; 2) the average amount of subsidies provided to cotton producers was 13 cents per pound in 2008/09, based on a September 2010 report from the ICAC, and this represents almost 85% of the average value received by Argentinean farmers for their cotton in 2009/10; 3) the same ICAC report mentions that the decrease in cotton support in 2009/10 was the result of an increase in international cotton prices and not changes in policies; 4) it is doubtful that the formulas of reduction in cotton subsidies suggested by the C4 countries in the DR negotiations will result in concrete benefits for the cotton sector because a reduction in cotton subsidies could be compensated by an increase in green box direct payments, with a similar distortion effect; 5) Argentina is ready to work in order to achieve ambitious and balanced results in the DR, consistent with the objective of development that it has always defended; 6) the Argentinean delegation wants to reiterate the need to reach within the DR results that comply with the mandate of the agricultural negotiations and in particular with the mandate to reduce substantially cotton subsidies in order to foster the global cotton sector.

The CHAIR thanked the delegate of Argentina and said that the ICAC Secretariat would include Argentina's full statement in the proceedings of the meeting. Argentina's report is a statement of the meeting.

The delegate of TOGO asked Mr. Grueff to explain why a change in U.S. attitude could bring impetus to the DR negotiations and for details regarding the potential changes for the DR that would result from a U.S. Republican Congress, given that Republicans had been at the head of

the U.S. government for the first eight years of the DR negotiations and that had not resulted in the completion of the round. Mr. Grueff explained that changes in the U.S. farm bill could break the current deadlock between the United States and developing countries regarding their willingness to compromise on each other's demands. He noted that Republicans are relatively more pro-trade than Democrats and that a change in the Congress might be able to provide some impetus to the DR negotiations.

The delegate of POLAND noted that the fact that a consensus from all WTO members was necessary to reach completion of the DR was indeed complicating the process. He said that the cotton issue was one of the principal elements of the development aspect of the DDA and that a successful outcome was urgently needed for African producing countries. He expressed Poland's disappointment in the slowness of the negotiations and in the absence of consensus so far. He noted that the European Union (EU) was an active player in the DR negotiations and was pressing for quick and ambitious results on cotton, having already made the necessary changes to its own cotton program. Poland's report is a statement of the meeting.

The CHAIR thanked the delegate of Poland and recognized the delegate of CAMEROON. He asked Mr. Grueff whether he could be more specific regarding the impact of C4 countries on DR negotiations, given that their request to eliminate subsidies had not been satisfied and support provided to the cotton sector had even risen in the last few years. He asked whether the C4 countries should expect results from the DR negotiations. Mr. Grueff explained that he simply wanted to show that even small countries such as the C4 could influence the DR negotiations, and that the C4 had managed to have a cotton subcommittee established and specific

measures taken. He recognized that the C4 had not yet received satisfactory results from the DR negotiations. He said he did not know what to expect from the negotiations. Ms. Fall said she believed that there would be no conclusion to the DR unless satisfactory conclusion for cotton was reached. Mr. Hudson noted that one of the problems in addressing cotton independently was the role of indirect subsidies, such as fertilizer subsidies. He said that this complicates the calculation of subsidies provided to the cotton sector.

The CHAIR recognized the delegate of UGANDA, who commented on Mr. Grueff's presentation. He noted that it was indeed worth completing the DR. He noted that East African countries had formed regional groups that had implemented their own regional trade policies, resulting in significant development in regional trade relationships. He said that developing countries had woken to the need of standing for themselves at the WTO, that they were ready to continue the DR, and that they were better prepared for it. Mr. Grueff congratulated Uganda and other African countries for developing regional trade arrangements. He noted that other countries in the world were acting similarly, but not the United States. He expressed his concern that so much political energy was spent in creating regional arrangements that less time and attention were available for multilateral trade negotiations. Dr. Hudson noted that the United States had tried to use bilateral agreements to push multilateral agreements, but that this did not work. Ms. Fall agreed that energy spent in the creation of regional trade arrangements was taking attention away from the DR. However, she emphasized that bilateral regional agreements were good but would not solve the problem of cotton subsidies, which could only be discussed within a multilateral agreement.

The CHAIR recognized the delegate of MALI, who noted that it was very important for the development of the cotton sector of Mali, a member of the C4, to resume the DR negotiations. He asked what was being done today in order to resume these negotiations. He also asked Mr. Grueff for more details regarding his advice to simplify the objectives. Ms. Fall invited the delegate of Mali to listen to her presentation of the following day, which would explain the efforts made to resume the DR negotiations. Dr. Hudson said that there was still progress in the negotiations but at a slow pace and that this could change quickly after the US elections. Mr. Grueff noted that he did not believe there was a way to complete quickly the DR, but that progress could be made more quickly if constituencies pressed their leadership. In regard to the simplification of the DR objectives, he gave an example where two countries could try to limit their negotiations to the items of interest in their commercial exchanges.

The CHAIR recognized the delegate of the UNITED STATES, who said that the United States remained committed to a successful conclusion to the DR and to the cotton issue within the DR, and that the United States played a leading role in Geneva.

The CHAIR recognized the delegate of ARGENTINA, who noted that in addition to the difficulty in accounting for indirect subsidies to the cotton sector, one had to take into account the monopoly situation regarding the sale of biotech cotton seeds, which also created a distortion in the market. He emphasized that cotton was a vital sector for many countries and contributed to food security. He concluded that the DR would not reach a successful conclusion unless there were balanced negotiations at the world level.

The CHAIR thanked the delegates and the panelists.

The CHAIR adjourned the meeting at 17:45 hrs.

Second Plenary Session

Statements

9:00 hrs. Thursday, September 23, 2010
Ambassador Tibor Nagy 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 Common Fund for Commodities (CFC) referred to the opening remarks of the Fund's Managing Director during the inaugural session and to the hand-out focusing on the current joint CFC/ICAC activities, already distributed to delegates. He

highlighted the two new CFC/ICAC projects that had become operational since the 68th Plenary Meeting of the ICAC in Cape Town: the first project aims to increase cotton productivity by smallholders in Eastern Africa, with a special focus on Kenya and Mozambique, while the second project intends to prevent seed cotton contamination in West Africa, with an initial focus on Burkina Faso, Cote d'Ivoire and Mali. He mentioned that both projects could be developed at a larger scale than initially foreseen thanks to the co-financing contribution from the European Union (EU) through its All Agricul-

tural Commodities Programme (ACP). The ACP program also provides significant co-financing to the ongoing CFC/ICAC project on the Commercial Standardization of Instrument Testing of Cotton, which has resulted in the establishment of two Regional Technical Centers in Tanzania and Mali. He noted that this project had been discussed during the meeting of the ICAC's Task Force on CSITC the previous day, and would be extensively reviewed during the Fifth Breakout Session on the subject of Best Practices in Instrument Testing the following day. He emphasized the commitment of the CFC to

the expansion of its cotton project portfolio and its intention to continue to work with the ICAC on new projects addressing joint priorities in the field of cotton development, to the ultimate benefit of smallholder cotton producers in Africa, Asia and Latin America. The CFC's report is a statement of the meeting.

The representative of the International Trade Centre (ITC) said that this was the fourth consecutive season that ITC was participating in the ICAC Plenary Meeting, showing ITC's increasing support to the cotton sector in developing countries and in particular Africa. He reported on ITC's cotton activities since the 68th ICAC Plenary Meeting in the seven following areas: Sector Strategy Development, Capacity Building in Cotton Trade and Marketing, Capacity Building of Cotton-related Associations at the National and Regional Levels, Facilitation of South-South Cooperation, Promotion of African Cotton, Reduction of Cotton Contamination at Gin Level, and Women in Cotton. He expressed his hope for cooperation with more ICAC member countries to obtain global data on the role and engagement of women along the cotton value chain. He thanked the European Commission (EC), which finances many ITC activities under the EU ACP. The ITC's report is a statement of the meeting.

The representative of the International Labor Rights Forum (ILRF) briefly presented her organization, an independent and non-profit entity dedicated to promoting labor rights around the world. Since its founding ILRF has been a leader in global advocacy on child labor as part of its work to promote core labor rights. She said that the International Labor Organization (ILO) had recently reported on the persistence of child labor in the world, and had expressed concerns that the global economic downturn could slow efforts towards the elimination of the worst forms of child labor. The ILO estimates that over 60% of child laborers worldwide are employed in agriculture. In a March 2010 meeting, government delegates and other stakeholders made commitments to a Roadmap to end child labor and this Roadmap identified agriculture as a target area. She noted that stakeholders had now the responsibility to engage in productive dialogue on how to eliminate exploitative conditions and promote decent work in agricultural production around the world. She recommended that the ICAC joins this global discussion. She noted that in cotton production (as in agriculture in general), child labor had to be addressed via different strategies, in particular by finding ways to raise farmers' income and by ensuring access to quality education. She urged governments and industry bodies worldwide to work together on this issue. The ILRF's report is a statement of the meeting.

The representative of CAB International (CABI) noted that CABI was a not for profit, intergovernmental organization with 47 member

countries. CABI's mission is to improve people's lives 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, 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. She mentioned some of their cotton projects in Pakistan, China and Africa. CABI'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 expressed his satisfaction that cotton demand enhancement programs now appeared to be viewed as "how and when" rather than "if." He mentioned the continued expansion of the Bremen Cotton Exchange's revitalization of the International Cotton Emblem and indications coming from India, Brazil and China that they were moving in a similar direction. He commented on the development of fashion shows and contests including fabric development with institutions of higher learning, which could influence positively cotton's market share. He indicated that the ICAC Third Open Session had shown the potential of the IFCP Speakers Bureau to combine information topics that enhance cotton's promotion scope. He invited participants to the Plenary Meeting to attend the Second Breakout Session "Demand Enhancement: Building on Successful Efforts" later that morning. He noted that this breakout session would mark the beginning of a new initiative called Cotton Expert, designed to simplify cotton demand enhancement. He noted that the IFCP supports all cotton regardless of origin, fiber length or agriculture system, but does not support exaggerated or inaccurate negative claims.

The executive director of the IFCP noted that the Forum had approved two resolutions for communication to the 69th Plenary Meeting:

- The IFCP offers to assist the ICAC with its efforts to identify information about cotton and to correct misrepresentations about cotton production practices.
- The IFCP identifies cotton as a natural fiber regardless of production method or seed technology.

He concluded by thanking 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 representative of the EU expressed its appreciation for the organization of the 69th ICAC Plenary Meeting and thanked the United States and the town of Lubbock for hosting it. The EU particularly appreciates this year's theme of the Plenary Meeting and highly values international cooperation in support of cotton. He noted that the EU believed that sustainable and fair production and trade of cotton could contribute to growth in both developed and developing countries. He provided an update with respect to the agricultural, trade and development assistance dimensions of the EU common policies and strategies towards cotton. Cotton production in the EU has recovered slightly in 2010/11, after years of decline in area and yields, and the EU became a net cotton exporter in 2009 as imports continued to decline. The EU market for cotton is completely open. Despite a continued decline in textile and clothing production and employment, the EU remains the second largest textiles and clothing exporter after China. However, the EU's trade balance has been deteriorating. He said that the EU had been able to push for an ambitious outcome on cotton in the WTO negotiations, thanks to its cotton policy reforms already implemented. He explained that the EU-Africa Partnership on Cotton would continue to provide the development assistance framework for the EU in the next couple of years. The total value of development assistance by the EU and its member states to African cotton has exceeded 350 million euros since 2004. He noted that the various EU-funded projects managed by the CFC in partnership with ICAC had made good progress in the first half of 2010. He also noted that the EU was the largest provider of development assistance to cotton. The EU report is a statement of the meeting.

The representative of the EU-Africa Partnership on Cotton expressed his thanks for the opportunity to speak during the 69th ICAC Plenary Meeting. He reminded that this Partnership had been established in 2004 to address the concerns of African cotton producers, who were strongly affected by the drop in international cotton prices in the 1990s and in the early 2000s. The Partnership includes two components: trade and development, and is defined through six strategic axes. The Partnership Steering committee is called the Comité d'orientation et de suivi du Partenariat UE-Afrique sur le coton, or COS-Coton. The COS-Coton is composed of 11 executive members representing five stakeholders, and is responsible for the coordination and implementation of the Action Framework. He noted that almost 140 interventions to support African cotton, either ongoing or finished, had been implemented in the context of this Partnership between 2004 and April 2010, representing a total amount of 450 million euros.

He noted the EU-funded All ACP Agricultural Commodities Program, which had a specific cotton program of 15 million euros over the period 2007-2011. He said that a follow-up All ACP African cotton-related program was being identified and would likely start during the first half of 2012. He referred participants to the website of COS-Coton and to the CD-rom that had been distributed and included information relative to the EU-Africa Partnership on Cotton. The EU-Africa Partnership on Cotton'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 four main areas of research: 1) the assessment of cotton sector performance and institutional changes; 2) the evaluation of cotton farming systems practiced by farmers and conception of innovating systems; 3) the characterization and evaluation of biotic risks and environmental impacts; and 4) the fibers quality characterization related to environmental conditions and quality build-up process. He noted that CIRAD contributed to the CFC/ICAC project focusing on the testing of cotton fibers in Africa, and that this characterization system should in time prevent the systematic price discount applied to African cotton. CIRAD's report is a statement of the meeting.

The representative of the Better Cotton Initiative (BCI) thanked the ICAC for giving BCI this first opportunity to make a statement during its 69th Plenary Meeting. She said that the aim of the BCI was to make global cotton production better for the people who produce it, better for the environment it is grown in and better for the sector's future. She noted that there were four categories of membership within BCI: producer organizations, suppliers and manufacturers, retailers and brands, and civil society, as well as a provision for associate members. She described BCI's approach to develop a market for a mainstream commodity, cotton, through the following objectives: 1) demonstrating the inherent benefits of Better Cotton production, particularly the financial profitability for farmers, 2) reducing the impact of water and pesticide use on human and environmental health, 3) improve soil health and biodiversity, 4) promote Decent Work for farming communities and cotton farm workers, 5) facilitate global knowledge exchange on more sustainable cotton production, and 6) increase the traceability along the cotton supply chain. She said that BCI was now in the implementation start-up phase, which will run to 2010, and focuses on four regions: Brazil, India, Pakistan, and West and Central Africa. She

said that the BCI was willing to work with other organizations to see how the BCI system could be implemented beyond these regions. BCI's report is a statement of the meeting.

The President of the African Cotton Association (ACA) thanked the ICAC for giving him an opportunity to speak during the 69th ICAC Plenary Meeting and thanked the United States and the city of Lubbock for hosting the meeting. He said that the ACA had been established eight years ago, was headquartered in Cotonou, Benin, and had 26 active members in 16 African countries. He explained that the ACA had been created in order to join forces amongst cotton stakeholders in Africa, to develop exchanges and synergies between African cotton stakeholders and those from other continents, and to defend African cotton, to promote it and to ensure its sustainable development. He thanked the ICAC Secretariat and in particular its Executive Director for his support of African cotton. He noted that the ACA had developed partnerships with the ITC, the EU, the Cos-Coton and soon with the West African Economic and Monetary Union (UEMOA). He noted that these partnerships had resulted in the development of South-South exchanges and cooperation, and supported the ACA efforts in improving the quality of African cotton, reducing its contamination, and adopting instrument testing. He said that the ACA and the Association of African Cotton Producers (AP-ROCA) disapproved of the utilization of the label "Cotton Made in Africa" by a non-governmental organization to brand the cotton that it promoted with a few cotton companies and farms in Africa. He said that this label had not been discussed amongst and agreed by African cotton producers, and he warned that this label could hurt the image of all African cotton in the case of a trade dispute on CmiA cotton. He requested that the CmiA label be rapidly modified. He noted that their disapproval was limited to the label, and that African cotton producers appreciated all the actions in favor of small African cotton producers and African cotton sectors that were implemented by the NGO involved. ACA's report is a statement of the meeting.

The CHAIR thanked the international organizations for their statements and called for the statements of member countries.

The delegate from EGYPT thanked the people and government of Texas and the city of Lubbock for hosting the 69th ICAC Plenary Meeting, all the participants, the ICAC Secretariat and the organizing committee for preparing the meeting, and the interpreters. He noted that Egypt had a great interest in attending this meeting as a producer of extra-fine cotton. He said that Egypt was working to produce cotton of high spinning value, high yield, short duration and to apply integrated pest management and minimize insecticides and herbicides to produce environmentally friendly cotton. Egypt supports the complete liberalization of its cotton sector

and of the world market, for prices to be determined by supply and demand. He summarized the recent trends in cotton production in Egypt, noting that the 2009/10 crop had been the smallest in over 150 years, and that the production was expected to rebound in 2010/11. He said that Egypt was making efforts to adopt instrument testing to measure cotton fiber quality. He noted that Egypt welcomed foreign investment in its textile industry. The country report of Egypt is a statement of the meeting.

The delegate of AUSTRALIA noted that the Australian cotton industry was entering a period of increased optimism following several years of severe drought. A significant increase in water irrigation supplies, higher cotton prices, as well as improved cotton varieties are expected to result in a production rebound of almost 70% in 2010/11, to 653,000 tons. However, he noted that the Australian cotton sector faced significant challenges in the future, including resource constraints, climate change, rising community expectations for sustainable industry practices and market risk management. In response to these challenges, the Australian cotton industry, with the support of research and development, is promoting initiatives to make the industry more efficient, profitable and sustainable. He noted that this has resulted in Australian cotton having competitive advantages, including high yields and superior fibre quality. In addition, Australia's proximity to Asian markets allows faster delivery of cotton to spinning mills. He said that Australian authorities were working to improve the security and reliability of irrigation entitlements and to create a more efficient water market in the Murray-Darling Basin, where most Australian cotton is produced. He noted that a successful conclusion to the WTO Doha Round remained the highest trade policy priority of the Australian government, and that the reduction and eventual elimination of the use of trade distorting subsidies in the cotton sector were particularly important for cotton producing and exporting countries such as Australia. Australia continues to encourage member governments of the ICAC to seek an ambitious outcome to the Doha Round. He said that the Australian cotton sector was committed to international initiatives that improve environmental practices and demand for cotton and cotton-based products, and encouraged global cotton industry participants to do likewise. He noted that Australia commended and supported a proposal put forward at this meeting to continue the work of the Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP) in its assessment of pesticide use. He said that the Australian cotton sector was encouraging the ICAC to conduct a study on the likely effects of climate change on cotton production and possible responses to these effects. The country report of Australia is a statement of the meeting.

The delegate of BRAZIL said that they would

present their statement in writing at a later time. He reported the support of the Brazilian delegation for the BCI and its objective to improve worldwide sustainability of cotton production. He recommended that the BCI should not be used as a commercial tool, as this is not its purpose. He requested on behalf of the Brazilian delegation that the Plenary Meeting strongly endorse the BCI as well as other initiatives to improve cotton's image in the world and to help create a health cotton economy, as was recommended by the PSAP.

The CHAIR welcomed Mozambique as a new member of the ICAC and invited the delegate to speak.

The delegate of MOZAMBIQUE said it was an honor for his country to address the 69th ICAC Plenary Meeting. He greeted all the participants on behalf of the Republic of Mozambique and his Honorable Minister of Agriculture. He noted that cotton remained an important crop for his country's economy despite its diversification. Cotton is particularly important for its rural livelihood and development, food security and human health. Cotton production in Mozambique declined significantly in recent years, due to farming inefficiencies, regulation gaps, market inefficiencies of the private sector, price volatility and an unfavorable exchange rate. A desire to change this situation and to share its experience encouraged Mozambique to join regional and international cotton organizations, in particular the ICAC. He thanked the ICAC Secretariat, the Chair of the Standing Committee and the member countries for having accepted and facilitated Mozambique's membership to the ICAC. He expressed their satisfaction to attend the Plenary Meeting as a full member and to learn from the experience of other members, and reiterated Mozambique's commitment to be an active member and to fulfill their duties and obligations as such. He said that Mozambique believed the theme of the Plenary Meeting should call for a new global path for cotton development based on the "togetherness of the cotton family worldwide" and that sustainability of the cotton industry depended on the ability of parties to coordinate and cooperate rather than compete. He expressed their wish for the establishment of an International Centre for Cotton Research and their willingness to contribute to this project. He noted that Mozambique was also supporting efforts to shorten the time length for implementation of trials by shifting them between the Northern and the Southern Hemispheres and would also be ready to contribute. He noted that Mozambique remained expectant that the conclusion of the Doha Round would bring an end to cotton production and export subsidies, unconditional access to markets and technical and financial assistance for production and productivity improvement. He concluded by expressing their hope that cotton would contribute proactively to food security, poverty

eradication programs and wealth generation. Mozambique's statement is a document of the meeting. The country report of Mozambique is a statement of the meeting.

The delegate of POLAND said that Poland had already submitted a complete statement on the situation of the Polish cotton industry. He raised attention on two issues important for cotton on the global scale. First, he noted that given that some raw materials such as cotton serve as a barometer of macroeconomic conditions, the strong rebound in cotton mill use in 2009/10 may imply that the global economy is on its way to recovery, which would benefit the cotton industry. Second, he addressed the problem of labeling, quality and safety of cotton products. In particular, he explained that inspections on textiles and apparels imported into Poland showed that a significant portion had defects, in particular mislabeling. He stressed that these problems were likely a global concern. He said that compliance with globally recognized production standards and fairness in international trade of textile products should be ensured by manufacturers, distributors and retailers on a worldwide basis. The country report of Poland is a statement of the meeting.

The delegate of SWITZERLAND said that his country was supporting the continuation of a constructive dialogue between ICAC and all the actors involved in the cotton supply chain, in order to allow sustainable development of this sector. Switzerland also believes it is important that discussions on the social and environmental impacts of cotton be based on credible, objective and scientific facts. This is why Switzerland has supported the work of SEEP and hopes that the conclusions and recommendations from experts will clarify the situation. He noted that Switzerland was strongly involved in promoting sustainable trade of commodities, such as cotton, through a consultative process including all actors of the supply chain. In this topic, Switzerland supports the BCI and appreciates the cooperation between ICAC and BCI. Switzerland believes that their support to the BCI approach is complementary to their support to niche markets (such as organic or fair trade cotton).

The delegate of NIGERIA greeted the participants on behalf of His Excellency Dr. Goodluck Ebele Jonathan, the President of Nigeria, and thanked the ICAC for inviting them to the 69th ICAC Plenary Meeting. She said that in the 1970s and 1980s the cotton industry was the largest employer after the government in Nigeria, but that this situation has changed. The cotton textile sector has declined significantly due to smuggling of textile products. Cotton production has also decreased, and 70% of the cotton used by spinning mills is now imported. These trends have resulted in the loss of employment for many farmers and textile workers. However, the Nigerian government is pursuing efforts to revive the cotton industry and in June 2009 it

approved the establishment of a cotton/textile/garment fund to facilitate investment in the cotton agricultural and textile sector. She lauded the efforts of the ICAC and the CFC for developing cotton projects in Africa, in particular Nigeria, and the EU for its substantial funding of ACP cotton-related programs. These projects should bring improvement in the operation of Quality Testing Centers in cotton producing countries in Africa. She noted that significant progress had already been achieved towards the revival of the cotton/textile sectors in Nigeria, and expressed their confidence that the sector would turn around in the near future thanks to the ongoing reforms. The country report of Nigeria is a statement of the meeting.

The CHAIR adjourned the meeting at 10:30 hrs.

11:00 hrs. Thursday, September 23, 2010
Ambassador Tibor Nagy in the Chair

The CHAIR called the meeting to order. He first invited Ms. Marième Fall de Perez Rubin, Counselor, Agriculture and Commodities Division at the WTO, to report on the status of the Doha Round negotiations.

Ms. Fall de Perez Rubin said that cotton was at the heart of the agricultural negotiations in the Doha Round (DR) and was the only commodity with specific treatment. She explained briefly the cotton specific mandates in each of the three pillars of the DR: market access, export competition and domestic support. She said that domestic support was the most important issue for cotton, but was also the most complicated due in part to the introduction of a new constraint, the reduction in Overall Trade-Distorting Domestic Support (OTDS). She noted that the green box criteria would be reviewed and clarified. She said that members were progressing in the approach of a consensus, but that there were still a number of brackets that needed to be agreed on and that the high number of WTO members involved in the negotiations was making this process relatively slow. In addition, each WTO member country often belongs to several groups with different interests in the DR, which complicates the discussions. She said that work on agriculture was proceeding on a two-track approach: the development of templates for modalities and schedules data, and the discussion of specific outstanding issues. She noted that the data work was advancing well and that chair consultations on outstanding issues were ongoing. She emphasized the importance of cotton as a key element of the DR. She thanked the ICAC for their support to the WTO Secretariat and expressed her hopes that the DR would reach soon a successful conclusion. Ms. Fall de Perez Rubin's presentation is a document of the meeting.

The delegate of SUDAN thanked the United States and the organizing committee for hosting and preparing the Plenary Meeting. He said that Sudan had recently adopted plans and strategies

to develop its agricultural sector and a program for agricultural promotion. Two years after the launch of the program, many accomplishments in the cotton sector have been realized, including: the development and upgrading of agricultural systems; increased application of technologies, improved use of fertilizers and increased mechanization; private corporations have been allowed to invest in cotton production, which has resulted in an increase in cotton area; ten new ginneries were imported and some units have already begun operating; three new cotton spinning mills have been developed; some international strategic partnerships were established with Chinese, Brazilian and Turkish counterparts, in which work on new varieties of cotton and biotech cotton is going on. Sudan welcomes such international cooperation. The country report of Sudan is a statement of the meeting.

The delegate of KENYA said that his government started implementing revival initiatives for the Kenyan cotton sector in 2005 and established a legal and institutional framework to guide the industry. In particular, it is providing targeted support to small farmers by providing free seeds, advisory service through extension service and cotton research. In addition, it is also working to rehabilitate irrigation schemes to develop irrigated cotton production, and is promoting increased efficiency of water use. It has also started to develop infrastructure that would support reliable testing of cotton fiber through instrument testing. It has also, through the Cotton Development Authority (CDA), initiated some projects to improve the competitiveness of Kenyan cotton: the establishment of a national Apex body comprising public and private stakeholders, the establishment of an input and credit system, and the development of collaborative research on a seed management system. The country report of Kenya is a statement of the meeting.

The delegate of CHINA (TAIWAN) thanked the United States and the Secretariat of the ICAC for organizing the 69th ICAC Plenary Meeting. He noted that Taiwan does not produce cotton and imports all its needs, which have declined since 2000. The United States is the largest supplier of cotton to Taiwan. The cotton spinning industry is the main user of imported cotton. The number of operating spindles has dropped in the last few years. The textile sector remains one of the most important industries in Taiwan, and Taiwan is the 10th largest textile and apparel exporter. He noted that Taiwan and China signed the Economic Cooperation Framework Agreement (ECFA) in June 2010 and that this agreement took effect on September 12. He said that this agreement would keep Taiwan from becoming marginalized in the process of regional integration, and would enable Taiwan's textile industry to compete on equal terms with ASEAN countries for China's market. He noted that Taiwan was an active member of

the ICAC since 1963. He announced that the Taiwan Textile Federation would hold an ICAC seminar on October 14, 2010 in conjunction with the Taiwan Innovation Textile Application Show. He expressed Taiwan's willingness to share its experience with other members of the ICAC. The country report of Taiwan is a statement of the meeting.

The delegate of INDIA noted that the global cotton economy was on the rebound, but that downside risks included high and volatile prices and increasing protectionist sentiment exacerbated by floods in major producing countries. He noted that the higher cotton prices posed a risk to the viability of textile mills and the apparel sector, and he recommended that price issues should be the essential focus of ICAC surveillance, data collection and policy advice in the coming months. He emphasized the need to work together to promote greater stability in the cotton market. He said that major cotton producing countries had to increase cotton supplies via increased investment in the cotton chain and policies to promote improved agronomic practices, efficient water and insecticide use. He said India felt the need for greater dialogue between cotton producers and consumers and further efforts to improve the cotton market data and transparency to improve market efficiency. He said India encouraged SEEP to carry forward the intensive studies initiated to improve the sustainability of cotton production through improved use of pesticides. India urges all member countries to adopt the recommendations of the PSAP regarding good trading practices. India urges the PSAP to deliberate issues of price volatility, improved trading practices and measures to improve market efficiency and transparency. India also urges the PSAP to appreciate the supervisory and moderating role of governments to keep the smooth flow of cotton availability and relative price stability to address the concerns of the domestic industry. He noted the need to deepen the ICAC's analysis of the criticism of the cotton industry and to develop a long-term strategy in responding to the challenges being posed. He noted that the Indian cotton sector was performing well, with increased cotton production and increased profitability for farmers and traders. The textile industry has been performing well too, and its viability is an important factor in determining domestic policies. India's policy is that all exportable surplus cotton would be exported and steps have been taken in this regard for the 2010/11 season. He noted that all export obligations made in 2009/10 had been fulfilled. He thanked the Chairman of the Standing Committee and the ICAC Secretariat for the organization of the Plenary Meeting. The country report of India is a statement of the meeting.

The delegate of PAKISTAN said that cotton was a major cash crop in his country, and that national economic growth was linked to the growth in cotton production. Accordingly,

the government has implemented all possible measures to enhance cotton production, and private stakeholders are encouraged to focus on cotton quality through standardization of grading systems. He said that Pakistan was the fourth largest cotton producer but that its cotton yields were still much lower than yields in some other major growing countries. Research and development has been concentrating on finding ways to raise yields in particular in small farms, with an emphasis on two issues: promotion of Bt cotton cultivation and the development of cotton leaf curl virus resistant varieties. He said that organic cotton production was encouraged in the province of Balochistan. He noted that the needs of the textile industry in cotton had significantly increased in recent years due to its growth. He said that the recent floods in Pakistan had negatively impacted the 2010/11 cotton crop and the humid weather had encouraged the proliferation of insects/pests, resulting in the loss of about 400,000 tons. The shortfall in production at a time of price volatility is creating a serious challenge for Pakistan's textile industry. He expressed Pakistan's hope that ICAC member countries, through close collaboration and coordinated efforts, would succeed in effectively meeting this common challenge. The country report of Pakistan is a statement of the meeting.

The delegate of UGANDA expressed her gratitude to the US government for hosting the 69th ICAC Plenary Meeting. She said that Uganda was a small cotton producer, which had experienced declining production in recent years due to low prices, declining yields, subsidies and competition from food crops. She noted that the government of Uganda remained committed to revive its cotton sector through the implementation of a five-year strategic plan. A larger crop is expected in 2010/11 due to the higher prices received by farmers in 2009/10. The government of Uganda is supporting the adoption of technologies to increase yields and the sustainability of cotton production, while maximizing farmers' incomes. She reported on the progress of the Bt cotton program in Uganda. She noted that the government of Uganda did not encourage or promote organic cotton production, but accommodated the organizations that developed it. The government has concerns about the lack of effective and readily available pest control measures in the organic production system, and its detrimental effects on cotton producers. The government has concluded that organic cotton production should be stopped if nothing can be done to effectively control pests. The country report of Uganda is a statement of the meeting.

The delegate of ARGENTINA expressed the gratitude of his delegation to the U.S. government, the organizers of the meeting, and the city of Lubbock for hosting the 69th Plenary Meeting. He said that cotton production in Argentina had increased significantly in 2009/10, to around 200,000 tons, and that this increasing

trend is expected to be maintained in order to provide the needed raw materials to the textile sector. In this objective, the national and regional governments and the private sectors have applied various strategies, including a plan for the sustainable development of cotton production; a program of assistance to improve the quality of cotton fiber (PROCALGODON); an integrated national project for cotton (INTA) to coordinate and manage actions; the phytosanitary sustainability of cotton production in Argentina; the implementation of a program from the private sector fighting against the bollweevil; a program aimed to provide financial support to smallholders; biotechnology; narrow-row cotton; promotion of the manufacturing of harvester-strippers that can be used in narrow-row plantings; and investments in the textile sector. He said that a national strategic plan on agriculture, fisheries and agro-industries, to be implemented by 2016 would include the cotton supply chain and support the strategies mentioned above. The country report of Argentina and his statement on PROCALGODON are part of the statements of the meeting.

The delegate of TANZANIA, on behalf of his government, thanked the US government for hosting the 69th ICAC Plenary Meeting. He said that stakeholders were going to start implementing the second Cotton Sub-Sector Development Strategic Plan in 2010/11, with the objective of raising cotton production in Tanzania. Weight will be put on the following pillars: contract farming (expected to address the issues of input supply on credit, provision of extension services and increased transparency to curb cotton contamination); revival of the seed multiplication system; adoption of Bt cotton now that the legal framework is in place; strengthening of the collaboration between the Tanzania Cotton Board and local authorities to increase capacity and efficiency in enforcement of regulations and extension service delivery; intensification of simple technologies at the smallholder level; expansion of instrument classing capacity; strengthening of the Cotton Development Trust Fund; strengthening of stakeholders' associations to facilitate self regulation; and intensification of promotion of Tanzania as an investment destination for spinning, textile and apparel industries. He noted that Tanzania supported the ACA position regarding CmiA labeling, which Tanzania considers discriminatory and wants to be modified. The country report of Tanzania is a statement of the meeting.

The delegate of TURKEY expressed the gratitude of his country to the US government, the organizing committee and the ICAC Secretariat for preparing the 69th ICAC Plenary Meeting. He said that cotton remains one of the basic sources of income for many people in Turkey, but on a gradually decreasing magnitude. He noted that cotton production had declined significantly in recent years due to severe drought, low cotton

prices and competition from alternative crops. He said that the textile and clothing sectors had grown over the last three decades, becoming important for Turkey's external trade. However, the drop in cotton production implies that large imports of cotton are necessary. He noted that production was expected to rebound to 500,000 tons in 2010/11 from a 15-year low in 2009/10. Consumption of cotton has recovered after October 2009 and is expected to reach 1.3 million tons in 2010/11. Turkey is expected to remain a large net importer of cotton. He noted that Turkey supports the idea of labeling conventional cotton bales as "GMO-free" and biotech cotton bales as "biotech cotton," the decision being left to each country. He said that Turkey also supported the establishment of an international research center for cotton. Turkey also supports the PSAP view that any program, including the BCI, which aims at improving cotton production, is laudable. However, he expressed his country's concern with the programs that might lead to unfair trade practices. The country report of Turkey is a statement of the meeting.

The delegate of COLOMBIA said that a full country statement had already been distributed. She discussed a few major issues important to the Colombian cotton sector. She noted that the Colombian delegation considered that biotech cotton contributed to the environmental sustainability of the crop, but urged companies selling biotech seeds to revise down the costs of these seeds, which for many countries are too high given the net benefits of these seeds. She said that they were supporting the work of the various committees of the ICAC to increase the sustainability of cotton production and to communicate it to the world, as well as the proposal for the creation of an international cotton research center. She recommended that the ICAC prepares a special publication or create a committee to inform member countries about the multiple initiatives looking at promoting better production practices, and their real impact on global sustainability of cotton production. She said that Colombia continued to support all the efforts made to decrease or eliminate the factors that distort the world cotton market, as well as the proposals of the C4 group, but considered that the progress in the WTO negotiations were extremely slow and insufficient. She expressed her delegation's gratitude to the ICAC and the government of the United States for hosting the 69th ICAC Plenary Meeting. The country report of Colombia is a statement of the meeting.

The delegate of MALI thanked the government of the United States, the organizing committee and the ICAC for preparing the Plenary Meeting. He said his presentation would be focused on the current reforms of the cotton sector in Mali. He explained the large importance of cotton for the Malian economy, but noted that in the last few years cotton production in Mali had faced a severe crisis due to a decline in international

cotton prices, an increase in input costs, a decrease in yields and an unfavorable exchange rate. As a result cotton production decreased significantly. This crisis led the Malian government to support the Compagnie Malienne de développement des Textiles (CMDT) and to start an important program of reforms for the whole cotton sector. The strategies planned to implement this reform include the following: centering of CMDT's activities on cotton; involvement of cotton producers and private operators in the sector; making capital available to producers and private operators; transfer of some critical functions to producers and private operators, and liberalization of the cotton and oilseed sectors. The CMDT was divided within four regional segments, which will each be privatized. Tenders for privatization of these four segments were launched in February 2010 and the privatization process will be concluded in April of 2011. He encouraged private investors to participate in this tender. The country report of Mali is a statement of the meeting.

The delegate of the UNITED STATES thanked the country delegates and international organizations for participating in the Plenary Meeting. He said that the United States had already submitted a detailed country statement outlining U.S. cotton policies and programs and detailed statistics on the US cotton situation. He noted that U.S. cotton area and production had rebounded in 2010/11, as producers shifted back to cotton due to higher prices. He noted that U.S. producers had the flexibility to respond to market signals and plant crops offering them the highest market returns, and that this flexibility had been illustrated in the previous two seasons as well. He highlighted the fact that a substantial portion of U.S. farm support including cotton was decoupled from current production decisions and thus had a less distortive effect on agricultural markets than input subsidies, which are less transparent, go mostly unreported and directly impact production. He said that U.S. cotton producers and the U.S. cotton industry were innovators in conservation practices and sustainable production and processing practices. He noted that the United States supported the recommendations of SEEP and encouraged all producing countries to adopt sustainable cultural practices and incorporate available technological advancements into cotton production. He said that the United States also encouraged ICAC support for initiatives aimed to improve the sustainability of cotton production around the world and toward improving the image of cotton in the global market place. However, he emphasized that the U.S. did not believe that it was the place of ICAC to endorse any particular initiative in this regard. The country report of the U.S.A. is a statement of the meeting.

The CHAIR adjourned the meeting at 12:30 hrs.

First Open Session

Resource Constraints and Cotton Production: Sustaining Cotton's Place in the World Market

11:30 hrs. Tuesday, September 21, 2010

Dr. Kater Hake in the Chair

The CHAIR invited Mr. Wallace Darnielle, President and CEO of Plains Cotton Cooperative Association, to present a report on sustainability of cotton production. Mr. Darnielle cited three definitions of sustainability: (a) "producing cotton today without reducing the ability of future generations to produce cotton"; (b) the United Nations definition of sustainable development, "development that meets the needs of the present without compromising the ability of future generations to meet their own needs"; and (c) a definition coined by John Elkington in 1994 which involves the confluence of three intersecting objectives: "People, Planet and Profit".

Mr. Darnielle indicated that cotton is a drought tolerant crop and, unlike man-made fibers such as Tencel and viscose, cotton is a net energy positive plant (it produces more energy through its fiber and seed than it uses). Cotton removes the equivalent of about 7 million cars' carbon dioxide emissions from the air each year through sequestration of carbon into the plant and its products, and it uses less than 3% of all agricultural water consumption globally. Contrary to claims made by some, cotton accounted for 6.8% of world pesticide use by value in 2008, and cotton production has reduced insecticide active ingredient use by 23% globally since 1996, leading to a 28% decrease in its environmental impact.

According to Mr. Darnielle, U.S. cotton producers use 45% less water to grow a kilogram of cotton today than 25 years ago. Conservation tillage has greatly reduced soil erosion. Insecticide applications declined by 50% since 1996, helped by the use of biotechnology and other modern technologies. In Texas, the cotton industry sustains about 25,000 direct jobs, and many more in supporting industries and trades, while the textile industry supports over 2,500 direct and indirect jobs. Furthermore, a cut and sew operation in Guatemala owned by the Plains Cotton Cooperative Association (PCCA) employs 3,500-5,000 full time workers. All jobs created by cotton production and industrialization comply with minimum wages and social benefits mandated by country laws. In order to support employment in rural areas globally, production of cotton and other natural fibers should be promoted rather than production of man-made fibers, which are produced in capital-intensive industries dependent on non-renewable resources. The U.S. cotton industry is involved in a number of projects to further improve the environmental and social sustainability of cotton

production, such as the elimination of gossypol from cottonseed, recycling of cotton textiles for home insulation, and the development of an in-depth Life Cycle Analysis for cotton.

Mr. Darnielle explained that the economic sustainability of cotton production is constrained by farm prices and costs of production, and demand at the retail level. Biotechnology has improved yields and qualities, but advances in drought and salt tolerance varieties and in nutrient absorption will further improve the economic sustainability of cotton production. Relative prices of cotton to crude oil and gold have declined through time. On the demand side, promotional efforts of the cotton fiber should be upscaled worldwide to improve the sustainability of cotton production. Cotton Incorporated and Cotton Council International are willing to share their experience on advertising cotton with any country or company interested in promoting cotton products, and invited the audience to a training seminar sponsored by the International Forum for Cotton Promotion (IFCP) during the Second Breakout Session. The speaker reminded the audience that after celebrating the International Year of Natural Fibers in 2009, there are ongoing efforts to promote natural fibers through the Discover Natural Fibers Initiative. Mr. Darnielle's presentation is a statement of the meeting.

The CHAIR introduced Mr. Allan Williams, Chair of the Expert Panel on the Social, Environmental and Economic Performance of Cotton Production (SEEP), to present a report on pesticide use in Australia, Brazil, India, Turkey and the United States. SEEP commissioned Alterra, a research group from Wageningen University in the Netherlands to conduct the analysis of pesticide use in the 5 selected countries. SEEP has also prepared an interpretive summary of the study and four separate reports on the factors influencing the use of pesticides in cotton in Australia, Brazil, India and the United States. All reports are freely available on the ICAC website at <http://www.icac.org/seep/documents/english.html>. The ICAC and the FAO Global IPM Facility provided the financial support to conduct the study. Mr. Williams presented a brief summary of the methodology, the findings, and the recommendations stemming from the analysis. The study reports on changes in the use pattern regarding total volume applied, and the type of pesticide applied, and therefore on the changes in the hazard profile of pesticides used in cotton over the period studied, with regard to human health and the environment. Each active ingredient (a.i.) was analyzed according to 5 different hazards: acute hazard to human

health, chronic hazard to human health, potential to leach to groundwater, hazard to aquatic organisms, and hazard to bees. A new indicator developed by the Alterra research group, called environmental toxic load (ETL), was applied to assess environmental hazards. Hazard is the potential of a pesticide to cause adverse effects to an organism due to its inherent properties, and it does not represent the actual risk in the field (which depends on exposure, pesticide formulation, soil properties, conditions during application, etc.) Data for Australia was available for 1995, 1999, and 2001 to 2007. Data for the other countries was available for 1994, 2000 and 2006. While the study refers to pesticide use, herbicides were not included because of data limitations, and the majority of the pesticides included were insecticides.

Mr. Williams reported that findings are organized by (a) pesticide (physical properties, toxicity of all the active ingredients, identification of the highly and extremely hazardous pesticides used in each country, for each year); (b) by country (trends in the profile of pesticide use in cotton, total pesticide use, cotton area, and yield); (c) and, for Australia, by type of cotton seed planted (conventional and biotech). Analysis of the most recent information available for each country resulted in the following figures for pesticide use on cotton: 1 kg a.i./ha in Australia (2007); 4.9 kg a.i./ha in Brazil (2006); 0.9 kg a.i./ha in India (2006); 0.6 kg a.i./ha in Turkey (2006); 1.2 kg a.i./ha in the United States (2006). In Australia, the average amount of pesticides (kg a.i.) applied per hectare steadily declined after a peak reached in 1999. No clear trends in amounts used were distinguishable in India, Turkey and the United States, but this may be due to the limitations of the data set. In Brazil, the use of pesticides increased during the years studied and by 2006 was 4-8 times higher than in the other countries. However, use of both extremely and highly hazardous products has decreased significantly in Brazil. In Australia, pesticide use on Bt cotton is considerably lower than use on conventional cotton. However, depending on which hazard is analyzed from the profile of the pesticide use, conclusions might differ: there has been an overwhelming reduction in use of moderately hazardous pesticides to human health on Bt cotton, but use of extremely hazardous products – while still very low – is almost the same in Bt and conventional cotton.

SEEP developed eight recommendations based on the results of the Study:

- i) SEEP recommends that WHO Hazard Class I pesticides be eliminated in countries where

adequate provisions for their management are not in place (see section 6 of the Study/ Alterra Report for details on “adequate provision”).

- ii) SEEP recommends that cotton-producing countries where the use of pesticides is higher than 1 kg of a.i. per ha should analyze and address the causes of such use.
- iii) SEEP recommends that the use of active ingredients that account for the highest contribution to the environmental toxic load (listed under section 2.2 of the Summary) should be minimized to reduce the environmental hazards to aquatic organisms and bees.
- iv) SEEP recommends that pesticides known to pose risks to unborn or breast-fed children should be eliminated from the cotton production system.
- v) SEEP recommends that governments, with the involvement of all concerned stakeholders in the cotton sector, make a strong effort to promote best management practices in plant protection and to reduce reliance on pesticides and subsequent risks to the environment and human health.
- vi) SEEP recommends that governments consider both environmental and health risks while formulating clear policy statements relative to pesticide risk reduction.
- vii) SEEP recommends that governments promote the collection of reliable crop-specific data related to pesticide use.
- viii) SEEP recommends that follow-up risk assessment studies be conducted.

The report of SEEP is a statement of the meeting.

The CHAIR invited Mr. Haroldo Rodrigues da Cunha, President of ABRAPA (Association of Brazilian Producers of Cotton) to comment on the reports. Mr. Cunha qualified the findings from the SEEP report about Brazil, indicating that: (a) only 3 years were included in the analysis; (b) cotton producers also produce other crops and it is difficult to allocate insecticide use by crop; and (c) that the tropical weather in Brazil makes cotton more susceptible to pests, increasing the need for pesticide applications. Brazil went through a complete change in its model of cotton production, from producing 144 kg of lint per hectare on 4.2 million hectares in the 1980's to producing 1.4 tons of lint per hectare on 830,000 hectares in 2009/10. Cotton yields increased tenfold since the 1980's and more than tripled between 1994 and 2006. However, many challenges remain. Cotton varieties stay in the field for more than 180 days (the world average is 140 days), requiring more sprays to control pests. Monitoring of pests takes place every 3 to 5 days. Breeding programs are needed to produce shorter cycle varieties. Additionally, narrow row cotton planting area amounted to less

than 10% of total cotton area in 2009/10. Narrow row cotton reduces the cotton cycle by 30 to 60 days, and reduces the use of inputs and insect pressure. Intercropping of narrow row cotton with soybeans in Mato Grosso, Mato Grosso do Sul and Goias resulted in higher farm incomes and lower pest pressure. Sixty percent of total sprays go to boll weevil control. ABRAPA will put in place a national boll weevil suppression program starting in 2010, and expects neighboring countries to join the initiative. Despite being approved in 2005, biotech varieties account for less than 10% of total cotton area. There is a need to use more biotech varieties. Bollgard II has just been approved for commercial use in Brazil, but it will take time to get adopted in the field. In summary, Brazil has the highest cotton yields under rainfed conditions in the world, but its sustainability needs improvement. Mr. Cunha expects a new revolution in cotton production in Brazil.

The CHAIR invited Mr. Voruganti Srinivas, Joint Secretary (Cotton), Ministry of Textiles, Government of INDIA, to comment on the reports. The speaker described the current prosperity of the cotton sector in India, led by an annual GDP growth of 9%, strong capitalization of the spinning industry, increased area, and increased productivity due mainly to the introduction of biotech seeds. However, measures to achieve food security in India will result in stagnant cotton area, but yields are expected to continue growing at 4.7% annually over the next decade. The challenges faced by cotton in India are the reduction of bale contamination, the improvement of fiber quality, the extension of the irrigation and transportation infrastructure, the standardization of the classing system, and rising awareness of sustainability in cotton production. India is currently developing demand enhancement programs for cotton.

The CHAIR invited Mr. Peter Ottesen, General Manager – Crops, Horticulture, Wine and Irrigation Branch, AUSTRALIA Department of Agriculture, Fisheries and Forestry, to comment on the reports. Mr. Ottesen stated that the SEEP report shows a growing maturity of the cotton sector, and it represents a step forward in recognizing the complexity of pesticide use. Australia is pleased with the findings of the study, since they show that acknowledging and addressing the problem with proper research and development and extension can reduce the impact of pesticide use. The report should serve as a “license to operate” to the cotton sector from the government and society. Government policy is an important determinant to how the cotton industry will evolve. In particular, governments face challenges regarding climate change, access to land, and water use. For example, the expansion of mining activities poses a threat to agriculture in Australia. Water has been over-allocated in Australia, and the government is setting up markets for water that could constrain the water

available for cotton production. In order to fight against climate change, governments are pushing for lower energy use, and this could have a negative impact on agricultural production.

The CHAIR opened the floor for questions. The delegate of TOGO asked for clarification on whether the threshold of 1 kg a.i. per ha accounts for the degree of toxicity or the degradability of each pesticide, and he asked why no West African country was included in the study. Mr. Williams said that the threshold recommended by SEEP does not account for the degree of toxicity or degradability of the pesticide, but that it should serve as a trigger to initiate discussions on the real risks from pesticides within each country. And he welcomed the offer of Togo to share their information with SEEP to extend the coverage of the analysis.

Dr. Francesca Mancini, a member of SEEP, suggested that governments implement the 8 recommendations from SEEP jointly, in order to eliminate the WHO Hazard Class I pesticides before comparing domestic pesticide use with the international threshold.

The delegate of NIGERIA requested clarification on why relative cotton prices to other commodities declined, but cotton production and consumption increased; and why extremely hazardous pesticides are used in similar quantities in biotech and conventional cotton in Australia. Mr. Darneille explained that cotton prices remained low since 2005 due to high carryovers and were later affected by the reduction in world consumption due to the global economic crisis. He said that now that consumption exceeds production, stocks are falling and prices have increased. Mr. Williams explained that the overall toxic load (amount applied and toxicity of chemicals) is lower in Bt than in conventional cotton, and that the use of highly hazardous pesticides was very low, but similar among Bt and conventional cotton due to the fact that the Bt gene only combats certain pests, and other pests affect the conventional and the biotech area similarly.

The delegate of SUDAN inquired about the correlation between the types of application and the degree of toxicity. Mr. Williams highlighted that the study is a generic risk assessment, and that the analysis of those relationships should be incorporated in the risk assessment by country, based on the specific local practices. For example, pesticides are mainly applied by airplane in Australia, while they are applied by spray at ground level in the United States.

The delegate of ARGENTINA inquired about the relationship between integrated pest management (IPM) and lower use of pesticides, and where is IPM used in Brazil. Mr. Williams responded that the study did not try to identify reasons behind the reduction in pesticide use. However, many countries (Australia, India, and the United States) have strong IPM programs and they are hopeful that IPM helped reduce

pesticide use. Mr. Williams indicated that a description of the IPM programs by country is included in the country summaries. Mr. Cunha added that 99% of Brazilian cotton is produced by big scale farmers who implement IPM.

The delegate of BRAZIL asked whether higher demand for fuels will impact cotton production in the United States and elsewhere despite higher cotton prices, and recommended that the Plenary Meeting recognized that biotechnology helps cotton achieve sustainability, and that cotton is a natural fiber, whether produced from biotech or conventional seeds. Mr. Darneille explained that if corn and soybean prices increase due to increased demand for biofuels, growth of cotton area outside Texas will be limited. But in Texas, due to water limitations, cotton will not lose area to corn or soybeans. Mr. Williams explained that a consensus could not be reached within SEEP as to recommend biotechnology as a way forward in sustainability, but he encouraged Brazil to make that suggestion for consideration by the Plenary Meeting. The delegate of TURKEY, based on the fact that pesticide use on conventional cotton production in Turkey is very low, recommended that the SEEP and ICAC be neutral on the topic.

The delegate of UGANDA requested clarification on how Brazil was achieving shorter season varieties, on whether fiber quality was affected, and how could narrow row planting result in lower pesticide use. Mr. Cunha indicated that Brazil already had an earlier season-shorter crop variety, and that planting cotton after soybeans reduced the cycle in narrow row planting, reducing the use of pesticide. Dr. Hake added that a shorter cycle reduced the input need to control weeds too; and that narrow row planting does not affect fiber quality, although it makes cleaning more difficult.

The delegate of COLOMBIA commented on the high costs of biotech seeds, and on the

associated greater requirements of technology management and knowledge transfer from seed companies to farmers, and the potential threat to the economic sustainability of the crop. Dr. Hake invited comments from INDIA on competition in the market for biotech seeds. A representative of the Indian Council of Agricultural Research (ICAR) indicated that when biotech seeds were introduced in India, there was only one supplier and seed prices were high. Through government intervention, seed prices declined to some extent. Nowadays, there are 4 gene sources and several companies producing biotech seeds in INDIA, and seed prices declined further and adoption has extended. Dr. Hake added that investment in breeding has increased substantially in some countries like India. Mr. Darneille added that biotech seeds are also more expensive than conventional seeds in the United States, and that in general it is more costly to produce cotton than other crops. However, due to a tremendous increase in yields and quality, gross revenue per acre has gone from \$100 to \$450.

The delegate from TANZANIA requested clarification on the pros and cons of conservation tillage compared to conventional practices, and requested information on the area under tillage in the United States. Mr. Darneille indicated that 2/3 of the area in the United States is under some sort of conservation tillage, while the other 1/3 is under no tillage. Implementing these practices requires a strong commitment from farmers to conserve soil and minimize erosion, and a strong weed control system is needed.

The delegate of ARGENTINA inquired about the greatest difficulties faced by the United States to eradicate the boll weevil, and commented on the financial hardship faced by farmers in developing countries and how costly it is for them to purchase biotech seeds. Dr. Hake indicated that the most difficult obstacle faced by the boll weevil eradication program was the organizational

structure to operate the program: growers chose democratically their actions and shared the costs with the U.S. and state governments.

The delegate of NIGERIA inquired about the possible actions to take in order to reduce the level of infestation and pesticide use in Sub-Saharan Africa, where humidity and heat are similar to those in Brazil. The Chair proposed to postpone the discussion until after the break to finish the session on time.

The CHAIR summarized the meeting, indicating that:

- i) Lower cost of production and yield improvements are needed for the success of cotton in the long term.
- ii) Biotechnology plays an important role in some countries, but management and technical communication is critical for its success. Furthermore, some countries like Turkey have managed to achieve high yields with low pesticide loads using conventional cotton.
- iii) The season length of varieties should be adapted to local agro-ecological characteristics.
- iv) There is a need for accurate and detailed data availability.
- v) There were no comments against the SEEP recommendations, and there seemed to be consensus that the SEEP study should be expanded to include more countries.
- vi) There is an interest in pushing the analysis beyond the volume of pesticide use.
- vii) There was a consensus to accept the eight SEEP recommendations.

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

The CHAIR adjourned the meeting at 13:35 hrs.

Second Open Session

New Developments in Cotton Technologies

15:00 hrs. Tuesday, September 21, 2010
Dr. Dan Upchurch in the Chair

The CHAIR said that the topic of this session 'New Developments in Cotton Technologies' is very important for improving the sustainability of cotton. He said that success lies in finding solutions through research. He congratulated Dr. Freddie Bourland, University of Arkansas, USA on his selection as ICAC Researcher of the Year 2010 and invited him to make a presentation. Dr. Fred Bourland covered all disciplines

of production research but started his presentation with breeding and genetics, with particular reference to biotech cotton. Apart from the usual benefits of the technology mentioned in literature or otherwise, Dr. Bourland stated that transgenic technology has made it possible to acquire traits that were not available otherwise. Regulation of biotech products has provided seed companies the benefits of protecting and regulating seed sales. He said that herbicide tolerant biotech cotton has simplified weed control in addition to lowering production costs. He said that the nega-

tive aspects of biotech cotton include cumbersome regulation processes, restrictive progress of the germplasm, high and upfront technology fee and resistance to transgenes. Newer technologies will not only take care of these negative effects but will also add additional positive effects. According to Dr. Bourland, a major thrust in the field of breeding will be marker-assisted technology in the near future. However, three hurdles—finding suitable genes, determine their linkages and a confirmation method to make sure that the gene is working—must be overcome.

Dr. Bourland observed that the pest complex has always been changing, which is also true with respect to biotech cotton. But, he hoped that new chemistries and biotech cotton resistant to lygus bug would be available soon. Monitoring plant development and making decisions for pesticide use as needed are important for optimum use of inputs. Many weeds have already developed resistance to glyphosate products, which has become a big concern for producers. Luckily, diseases are not that important in most cotton producing countries. He hoped that biotech cotton resistant to nematodes would soon be developed. Dr. Bourland emphasized the need for multidisciplinary team approaches, including plant characters like nectariless and others for successful pest management.

In the field of plant nutrition, Dr. Bourland concurred that researchers have a challenge to increase fertilizer-use efficiency and protect the environment at the same time. He offered application of organic amendments and precision fertilizer use as possible options to the above challenges. Researchers have developed a good understanding of the physiology of the cotton plant, but there is a need to utilize this knowledge and make adjustments depending upon production conditions in various countries.

Dr. Bourland did not expect any significant changes in the technology of picking cotton in the near future but he expected that machine picking would spread to more countries in the next decade. He particularly appreciated the development of 'plot pickers' that were very helpful in selecting high yielding progeny rows which otherwise could be lost due to reliance on visual observations. He recommended expanded use of plot pickers in breeding programs around the world. Regarding ginning, he mentioned high-speed roller gins and determination of ginning efficiency of new varieties. Dr. Bourland hoped that a new technique of lint cleaning that uses cylinder pins instead of saws, combined with high-speed roller gins, would have a positive impact on fiber quality. He also made a mention of the 'quality score' he is using to screen his breeding material. The quality score assimilates six fiber parameters into one reading. He also mentioned development of gossypol free seed and expanded uses of gin waste.

Dr. Bourland concluded that new technologies would continue to be developed, but they will probably be expensive. He said that the issue is not whether the cotton industry can afford new technologies; the issue is whether the industry can afford not to adopt new technologies. He observed that his interaction with experts in various disciplines showed a lot of optimism among researchers with respect to finding solutions. He advised that every country must remain receptive to new technologies for improving profitability and sustainability of cotton production. Dr. Bourland's presentation is a statement of the meeting.

The CHAIR invited panel members to make their comments and ask questions of Dr. Bourland. Responding to a question from Mr. Walt Mullins of Bayer CropScience, Dr. Bourland stated that public support for cotton research is decreasing. He added that he is not fully aware of the situation in every country but probably the situation is the same in most countries. Less funding is attracting researchers more toward contract type of research rather than remaining focused on primary objectives. Dr. Mohammad Mustafa of Sudan agreed that researchers are facing funding problems to implement their programs. Mr. Bruce Finney of Australia stated that some countries, like China and India, are increasing funding on research but observed that investing in management/people is as important as investing in technology development. Mr. Baris Kocagoz of Turkey observed that biotech cotton is not permitted for commercial cultivation in Turkey, but his government is providing support for research on cotton.

As the CHAIR invited questions/comments from the floor, and a researcher from the Texas Tech University suggested that cotton researchers must look into new industrial uses of cotton and add attributes to cotton like oil absorption for enhancing the use of cotton.

The delegate of UGANDA referred to an international conference organized by the ICAC in Pakistan in 2007 and wanted to know more about fiber quality trait improvements in biotech cotton. He thanked Dr. Bourland for clarifying the issue regarding gossypol free seed with retention in the rest of the plant of normal gossypols that are important to control certain insects. The delegate also sought additional comments from the speaker on special plant characters like frego bracket, hairiness, etc. Dr. Bourland responded that fiber quality did not receive sufficient attention when biotech cottons were introduced, but he said that research is going on now, but only slow developments are expected. Dr. Bourland referred to the negative correlation between yield and decreased hairiness and said that a focus on special characters would also depend on growing conditions and prevailing pests in the area. He said that biotech cotton is not suitable for all production conditions and only insect resistant cotton could positively affect yield components.

The delegate of INDIA observed that remote sensing to predict yield has proved misleading in his country. He wanted to know what should be done to improve fiber quality, and he asked about the role of USDA in the development of varieties, given that all biotech varieties have been developed by the private sector. Dr. Bourland replied that he is not recommending remote sensing for assessing yield and he is improving fiber quality only by putting a desired selection pressure and discarding genotype that do not conform to his standards. The US Department of Agriculture undertakes research directly but

also supports research undertaken by various other segments of the industry, including universities.

The delegate of BRAZIL suggested that the ICAC should approve the use of biotech cotton as a tool to improve the sustainability of cotton by reducing insecticide applications. Dr. Bourland assured that biotechnology is a powerful tool of insect control and contributed to the environmental sustainability of cotton production.

In response to a question from the delegate of ARGENTINA, Dr. Bourland said that he supports prioritizing research objectives for efficient use of resources. The delegate of ARGENTINA drew the attention of delegates to the 66th Plenary Meeting held in Turkey wherein he proposed to have inter-hemisphere collaboration among research centers. The CHAIR said that he appreciated the concept and agreed that research results should be shared among countries.

Responding to a question from the delegate of SUDAN, Mr. Mullins informed the meeting that Bayer CropScience is not developing broad-spectrum insecticides any more. New chemistries are target-specific and more environmentally friendly.

The CHAIR invited Mr. Baris Kocagoz to make a formal statement from Turkey. Mr. Kocagoz said that the share of insecticides used to grow cotton in India declined from 42% in 1998 to only 28% in 2006. Thus, India saved US\$82 million on insecticide use in 2006, which is due to the adoption of biotech cotton. Mr. Kocagoz also compared production costs in Turkey with the USA and concluded that in Turkey the cost of production of seedcotton is US\$0.85/kg as compared to US\$0.61/kg in the USA. Mr. Kocagoz observed that Turkey could save a lot by minimizing costs on chemical use, fuel costs and hoeing of cotton to get rid of weeds. He stated that consumers have the right to be informed properly, and he suggested that the plenary meeting should recommend conventional cotton bales should be labeled as 'GMO free' and biotech cotton bales as 'biotech.' He said that Turkey is planning to initiate labeling of cotton bales from Turkey as 'GMO free.' Mr. Kocagoz's presentation is a statement of the meeting.

The delegate of INDIA said that the Bt gene is not expressed in lint and there are no detectable differences between biotech and non-biotech lint. He opposed initiating such labeling. The delegate of BRAZIL also expressed his reservations on discriminating among cottons based on production technology. He asked how Turkey, being a big importer of biotech cotton from the USA, is able to keep biotech and non-biotech cotton separate from each other all the way to garment manufacturing. Mr. Kocagoz remarked that he is not claiming that there are differences between the two, but he said that Turkey supports the idea that a consumer has a right to

know whether it is biotech or not biotech cotton. Later, the delegate of TURKEY stated that biotech seeds cannot be imported into Turkey and so there is no possibility of mixing biotech and non-biotech production in domestic cotton. He added that domestic cotton and imported cotton are not mixed in spinning mills and so Turkish mills do not produce blends of biotech and non-biotech cotton yarn.

The delegate of NIGERIA asked Dr. Bourland how hybrid cotton could help to deliver transgenes and why only nodes above the white flower are used to monitor crop maturity. Dr. Bourland replied that hybrid cotton could utilize transgenes even in heterozygous condition, and it provides biological protection, as farmers cannot save seed for next-year planting. However, he added that no economical systems are available to produce hybrid seed on a commercial scale. The number of nodes above white flower is the best indicator of crop maturity compared to all other indicators.

The delegate of COLOMBIA suggested that the ICAC should support the establishment of an international research center for cotton. She stated that the proposed international center could produce results more quickly (as suggested by the delegate of Argentina), could save on costs by working on problems common to many countries and would be an instrument for sharing results.

The delegate of SUDAN, referring to the proposal from Colombia, observed that he thinks that almost all other crops have international research centers except cotton. He said that cotton should be treated equally, and an international research center for cotton should be established. The delegate observed that his government would support any such initiative.

The delegate of ARGENTINA also joined the discussion regarding the establishment of an international research center on cotton and suggested that the report from the expert group should be carefully considered. The delegate added that the international research center for cotton may not be equally useful for all countries, but the theme of this Plenary Meeting is 'Cotton Industry Growth Through Global Unity' and countries must be united in the long-term interest of the commodity.

The delegate of TURKEY also supported the establishment of an international research center for cotton. He hoped that the center would produce useful results for all cotton producing countries. He urged governments to make an early decision before it is too late. The delegate added that he did not support the suggestion that the ICAC should endorse biotech cotton as a tool of sustainability.

At the end of the session, the CHAIR thanked all panelists and once again congratulated Dr. Bour-

land for the honor of being selected as the ICAC Researcher of the Year 2010. The SECRETARY GENERAL summed up the session by asking the Chair to confirm that the following three proposals had been made by the meeting:

1. The proposal from Brazil to regard biotech cotton as an important component of plant protection for improving the sustainability of cotton;
2. The proposal from Colombia to establish an international research center for cotton; and
3. The proposal from India not to endorse labeling of biotech and non-biotech cotton.

The CHAIR concurred that those proposals had been supported by a majority of participants in the Session.

In addition, it was noted that the delegate of Turkey had proposed that bales of cotton made from conventional seeds should be labeled as GMO Free, and cotton grown from biotech varieties should be labeled as Biotech Cotton. The delegate proposed that each country should be allowed to decide whether to implement the proposal.

The meeting was adjourned with no additional comments at 17:00 hrs.

Third Open Session

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

9:00 hrs. Wednesday, September 22, 2010
Mr. Jeff Silberman in the Chair

The SECRETARY GENERAL explained that this session is organized differently than other sessions. He said that the Chair will pose questions, and members of the panel will be invited to react and the discussion will be open to all participants in the meeting.

The panel agreed that fabric development is driven by consumers needs and pricing, since the ultimate goal of product development is to increase business through higher demand and higher prices.

The panel identified a number of factors affecting fiber content decisions: the feel of the fabric and how consumers react to it; the sustainability perception of each fiber (technological advances in cotton production and improvements of growing practices have a positive effect on final demand for cotton products); fiber innovation, such as rayon eco-fibers, tend to increase the use of man-made fibers in blends; differential import tariffs on different textile products (in the United States, the import duty for products with at least a

55% blend of cotton is 6% to 8%, while the duty for synthetic fibers is 16% to 18%); for high-end textile products, the added dimension and layering effects of each fiber affects consumer demand. In traditionally cotton intensive textiles such as jeans, towels and bed sheets, cotton is the dominant fiber and there is little room for blending other fibers into the fabric (however, Tencel and rayon have recently been incorporated into a small volume of denim fabrics, and cellulosic fibers have recently been incorporated into a small volume of towels).

The panel indicated that there is room for positive synergies between man-made fibers and cotton, as long as blending increases the quality and the desirability of textiles. The positive response observed in the market for jeans after the introduction of 2% spandex on denim was given as an example. Fiber content is relevant in marketing textile products to the extent that consumers care about it. Cotton is associated with absorbency and softness. But there are initiatives to develop fabric made from man-made fibers with similar characteristics, such as the 100% micro-denier polyester woven fabric with

strong wicking properties.

The marketing campaign for organic cotton started a trend among consumers to look for sustainable cotton. Apparel companies are facing more questions from their customer base about the textile production process, how fibers were produced, living and working conditions in fields and factories, environmental effects, and others.

The delegate of EGYPT requested clarification on what drives fashion. The panel agreed that for mass-marketed products, the most important factors in decreasing order are price, color, fit to the body, and fiber content; while for high-end textiles, the most relevant attributes are fit to the body, color, marketing and image, and scale of production. Packaging and marketing have impacts on prices.

The delegate of TANZANIA requested information about the reliability of organic cotton labels in apparel and garments. The panel agreed that the lack of a legal definition of what constitutes organic textiles in the United States leaves room for lax interpretations of the term, and results

in cases in which the organic fiber component of products labeled organic is lower than 10%. Some companies are reporting detailed fiber content in each label, targeting transparency through traceability to re-assure consumers about the reliability of their labels. An important lesson for all types of cotton that stems from the organic marketing campaign is that successful marketing strategies can have strong and lasting effects on the demand for fibers. In the European Union, the terms organic and biologically produced are legally defined terms, and proper evidence must be provided to support the claim that products are organic. If the retailer fails to furnish evidence to support its claim it can be legally prosecuted. These definitions have been in place for 25 years. Producers in Mali, Burkina Faso, Kyrgyzstan and India are complying with these legal definitions. However, the delegate of POLAND highlighted the existence of different definitions for organic textiles across countries within the European Union. A representative of the Organic Exchange indicated that information on organic textiles could be found on the web page www.organicexchange.org.

The delegate of BRAZIL enquired about the degree to which consumer preferences drive fabric development, and the degree to which textile companies tell consumers what they should like. Panelists indicated that the balance of power switched over the last 30 years from decisions being taken by textile companies to decisions being taken by retailers, who listen to consumers. The increase in installed textile capacity around the world facilitated the shift. However, the success of Cotton Incorporated in educating consumers about fiber content and the benefits of cotton shows that consumer preferences can be modified through marketing.

The delegate of the UNITED STATES requested clarification on whether the opinions of the panelist were based on scientific evidence or anecdotal evidence, and on the share of consumers interested in issues behind labeling across countries. Panelists drew their conclusions based on combinations of hard data and anecdotal evidence. The panel indicated that European consumers are more interested than U.S. consumers in how fibers are produced and their sustainability profile. However, it was noted that the EU is the largest end use consumer of polyester in the world. Young, urban, and educated consumers in the United States want to avoid products perceived as not sustainable. In China, end use textile consumption is heavily dependent on polyester, and the trend could accelerate. The development of sustainable policies by IKEA and Wal-Mart will put extra pressure to enhance sustainability on all cotton production through time.

The panel agreed that sustainable cotton does not need to be organic. Conventional cotton production with proper management of resources and resulting in increased farmers' income is sustainable.

The delegate of INDIA requested clarification on how the ICAC plans to implement the Three-Pronged Response to criticism about the sustainability of cotton production proposed in the Report of the Executive Director to this Plenary Meeting. The Executive Director stated that it is the prerogative of the Plenary Meeting to evaluate whether the information in the report merits additional consideration. The delegate of INDIA proposed that a sub-committee be formed to implement the suggestions included in the Report of the Executive Director. The delegate of BRAZIL supported this suggestion.

Dr. Sebahattin Gazanfer, Advisor to All Textiles and Raw Materials Exporters of Turkey, made a presentation on BCI and its adverse effects of cotton sourcing requirements by the large retailers, who were members of the BCI. At the outset, he stated that he fully supported the technical arm of the BCI, together with any programme which engaged itself to the betterment of the cotton industry. However, he was not in a position to express a similar view on the commercial arm of the BCI, pointing out that the textile mills in Turkey were being asked to source their cotton from growers/traders who were participating in the Better Cotton Initiative (BCI). He was concerned that this requirement had the potential of disrupting the established long term business relationships with suppliers in the US, Greece, etc., where BCI was not yet active. Dr. Gazanfer explained that roughly two-thirds of Turkey's total cotton imports came from the US due to many advantageous factors, unique to the US cotton, for which he gave a long list, which included; being competitively priced, consistent in quality, little or no serious contamination risks, timely delivery, after sales care, attractive credit terms, no sovereign risk, etc. He added that the supply chain of BCI cotton was not as yet established, and the potential sellers of BCI cotton demanded certain premium. Dr. Gazanfer labeled the request unrealistic and even absurd, since it had no regard to the long term business relationship running smoothly for the last 20 years with their cotton suppliers. Given the above legitimate reasoning and current little or no availability of the BCI cotton in the world market, he questioned the maturity and appropriateness of such a request from various angles, including from the perspectives of free and fair trade practices. He concluded his remarks by requesting from BCI's retailer members to refrain from forcing textile mills to source cotton from BCI farmers, and that BCI should work to unite the cotton market rather than fragment it. He added that contrary course of action should lead to the ICAC to take measures, which should include discussions to distant itself from the BCI. The report of Mr. Gazanfer regarding the BCI is a statement of the meeting.

The delegate of ARGENTINA complained about not being given the floor despite having the country placard standing for 20 minutes, and

he refused to pose the question the delegation intended to ask in discontent. The Executive Director apologized for failing to recognize the delegate of Argentina, and explained that he asked the Chair to allow Dr. Gazanfer to make his presentation, which was long scheduled on the agenda. The delegate of BRAZIL expressed his support to the claim made by the delegate of Argentina.

The delegate of AUSTRALIA asked panel members what can a farmer do to add value to textile products and how can farmers capture that extra value; and he asked whether cotton should have its own brand to differentiate it from other fibers. The panel saw great opportunities to branding cotton, as well as to differentiating different types of cotton. SUPIMA was cited as a successful branding experience.

The delegate of COLOMBIA asked the ICAC Secretariat to create a glossary of the terms used in cotton promotion across alternative initiatives to improve the communicating strategy of the sector. The delegate of UGANDA expressed his support for the request from the delegate of Colombia. The delegate said that the Ugandan delegation has been requesting that the ICAC organize a session on organic cotton production for 3 years. In Uganda, promotion of organic cotton production without the use of inorganic pesticides resulted in tremendous yield losses due to high pest pressure. The delegate of Uganda questioned the viability of organic cotton production. Panel members indicated that partnerships between retailers and upstream suppliers should provide answers to how to improve sustainability and make it work for farmers. However, it was noted that in India and Turkey yields in organic and conventional cotton production systems are similar.

The delegate of KENYA commented on the apparent contradiction between Turkey's refusal to recognize biotech seeds as a sustainable technology, and Turkey's sourcing most of its imports from the United States, where biotech cotton is widely adopted and not segregated from conventional cotton.

Noting that some NGOs are claiming that cotton should not be recognized as a natural fiber because of the use of biotechnology, the CHAIR asked panel members to comment. The panel found no merit in not calling biotech cotton natural. The Chair asked if any countries felt that cotton should not be described as a natural fiber, and seeing no objections or comments, he concluded that the ICAC defines cotton as a natural fiber regardless of production methodology or seed technology.

The delegate of POLAND inquired about the effect of high cotton prices on retail designs, and she commented that lab tests found traces of chemicals used in cotton production and metals in cotton fabrics imported into Poland, which undermine the perception of safety in cotton

textile products among consumers. The panel concluded that the potential to pass along higher cotton prices to consumers depends on consumers' disposable income. The panel was unable to comment on the traces of chemical residues on textiles without knowing more about the particular examples. It was noted that tests conducted

annually by the Bremen Cotton Exchange for many years show that chemical residues from cotton production are not detectable on samples of lint at levels above those for food products in the European Union.

The delegate of BRAZIL indicated that the panel would have benefited from having invited speak-

ers from mass-merchandisers targeting low-end consumers.

The CHAIR apologized for having to shorten the discussions because of time limitations. He thanked the ICAC and all members of the Panel for their participation in the discussion. The meeting was adjourned at 11:15 hrs.

Fourth Open Session

Outlook for Prices of Cotton and Competing Commodities

11:30 hrs. Wednesday, September 22, 2010
Dr. Gary Adams in the Chair

The CHAIR recognized the delegate of TOGO, who asked a question related to the 3rd Open Session. The delegate of Togo asked for a definition of the "Cotton Made in Africa" label, and which countries this label relates to. The Secretary General replied that he would communicate the question to appropriate persons for a response.

The CHAIR observed that current the market situation is drastically different from the situation a year earlier, with prices now exceeding a dollar per pound. He said that this situation presented an interesting background for a discussion of the outlook for cotton.

The CHAIR introduced Mrs. Armelle Gruere and Dr. Alejandro Plastina to present a report from the ICAC Secretariat on the outlook for cotton supply and use. The report indicated that after declining for three consecutive years, world cotton production is expected to rebound by 16% to 25 million tons in 2010/11, encouraged by the significant rise in prices experienced the previous season. They reported that world cotton mill use should also continue to recover, but more slowly than in 2009/10 due to limited available supplies and high prices, to 25 million tons. As production and consumption are forecast to roughly balance in 2010/11, world ending stocks are expected to remain stable at 9 million tons. World cotton trade is forecast to continue to increase by 8% to 8.4 million tons, driven by larger Chinese imports. The United States will account for most of the increase in exports this season as a result of lower competition from India.

They indicated that as consumption of chemical fibers started recovering in 2009, while cotton consumption was still subdued, the market share of cotton declined for the third consecutive year to 36.5%. The Secretariat forecasts a further decline in the share of cotton in world fiber consumption to 35.7% in 2010, and to 35.0% in 2011. The projected decline of cotton's share in world textile fiber consumption is the result of an expected faster recovery of non-cotton fiber than of cotton fiber consumption in 2010 and 2011,

partly influenced by an increase in prices of cotton relative to prices of competing fibers.

According to the Secretariat, the season-average Cotlook A Index is expected to continue to increase by 14% to 89 cents per pound in 2010/11, with a 95% confidence interval ranging from 76 cents per pound to 103 cents per pound. This would be the highest season-average since 1994/95. According to the Secretariat, the current increase in cotton prices seems to be driven mostly by market fundamentals, rather than speculation. However, external factors such as the uncertain global economic outlook, possible government measures affecting global cotton trade, and price competition with other fibers could affect the degree of increase in prices in 2010/11. The report of Mrs. Gruere and Dr. Plastina is a statement of the meeting.

The CHAIR called on Dr. Rafiq Chaudhry of the Secretariat to make his presentation on the cost of production. Dr. Chaudhry stated that the ICAC Secretariat undertakes a survey of the cost of cotton production at three-year intervals. In 2009/10, 34 countries participated in the survey. The sample was divided into six groups: North America, South America, Asia, West Africa, other Africa and Australia. Dr. Chaudhry said that the average net cost of production of seed cotton increased from US\$0.34 per kilogram in 2006/07 to \$0.43 per kilogram in 2009/10. The average cost of production of cotton lint (net of land rent and the value of seed) increased from \$1.04 per kilogram to \$1.22 per kilogram over the same period. Lower yields were the main drivers of the rise in unit production costs. The cost of production of cotton lint varied among regions from \$0.91 per kilogram in African countries other than West Africa to \$1.96 per kilogram in North America. In Asia and West Africa, the net cost of production of cotton lint was \$1.15/kg.

Dr. Chaudhry reported that the average cotton farmer over the entire sample spent \$0.08 per kilogram of cotton lint production on planting seed, \$0.14 on insecticides, \$0.28 on fertilizer, \$0.28 on weed control (hoeing, thinning, inter-culturing/weeding and chemical weed control), and \$0.10 on irrigation in 2009/10. Insecticide costs remained stable, but fertilizer costs in-

creased by \$0.06 and weed control costs more than doubled between 2006/07 and 2009/10. The Fruitful Rim region of the USA, followed by Colombia and China, had the highest costs of production of cotton lint in 2009/10, exceeding \$2 per kilogram. India, whether irrigated or rainfed, had the lowest production costs of cotton lint because of recent increases in yields and high values for seed. The value of cottonseed in India is 3 to 4 times greater than the cost of ginning.

Dr. Chaudhry indicated that despite the 250 kilograms per hectare difference in yields in favor of irrigated areas (63% of world cotton area), the average net cost of producing a kilogram of lint under irrigated conditions (\$1.40) was higher than under rainfed conditions (\$0.93) in 2009/10. The average net cost per hectare under irrigated conditions was \$1,231 compared to US\$679 under rainfed conditions. The Report *Cost of Cotton Production of Raw Cotton*, is part of the documents of the meeting.

The CHAIR introduced Mr. Andreas Engelhardt from Oerlikon Textile International to speak about the outlook for polyester. Mr. Engelhardt indicated that the global supply of manmade fibers (synthetics and cellulose fibers) and major natural fibers (cotton, wool, and silk) has increased at a 3.3% rate per year since 2000, reaching 70.6 million tons in 2009. During this period, the share of manmade fibers increased from 59% to 63%, while the share of cotton declined from 38% to 36%, and the share of polyester increased from 36% to 45%.

According to Mr. Engelhardt, the widening gap in prices between cotton and polyester has already resulted in shifts to polyester in spun yarn manufacturing. Given the significant excess capacity of polyester, in particular in China, the potential for a sustainable higher price level of polyester appears to be limited. Therefore, it seems most likely that comparatively low polyester prices will lead to declining cotton prices. Simultaneously, a downswing in cotton prices will directly affect prices of acrylic and cellulosic fibers. An additional burden in cellulosics comes from considerable investments for expansion in the Chinese market.

According to Mr. Engelhardt, global fiber con-

sumption is expected to continue its long term trend, favoring polyester consumption over cotton consumption. The production of polyester fibers is projected to increase from 32 million tons in 2009 to 47 million tons by 2020, at an annual average growth rate of 3.8%. The expected growth in polyester production is substantially faster than the expected growth in cotton production. Mr. Engelhardt said that two often-cited potential limitations for polyester production are high crude oil prices and the finite nature and instability of fossil fuel supplies. However, the impact of oil prices on prices of raw materials used in polyester production (paraxylene, purified terephthalic acid, and monoethylene glycol) has often been overrated, according to Mr. Engelhardt. Furthermore, technological change should reduce the global dependence on oil and relax the second limitation to polyester production. Mr. Engelhardt's presentation is a statement of the meeting.

The delegate of INDIA said that high price volatility could mean that the fundamentals of cotton supply and use presented by the Secretariat underestimate the degree of supply shortages. He suggested that the work of the Secretariat should be reviewed by economists to suggest areas for improvement in forecasts of supply, use and prices. He indicated that policy makers in India must balance the markets and interests of 60 million workers. He pointed out that price volatility in China is much lower than in India and that prices of \$1.10 per pound are not viable for textile units in India. He suggested a meeting between consuming and producing countries during the plenary meeting to discuss price volatility and ways to achieve market stability, and he suggested that additional meetings should be convened quarterly. He suggested that the plenary meeting should agree on appropriate guidelines for stocks-to-use ratios in major countries.

The delegate of ARGENTINA supported the statement by India on the need for a study on volatility and observed that the Argentine delegation presented a document about the negative effects of price volatility to the Plenary back in 1989. The delegate asked Mr. Engelhardt to comment on the amount spent on research by the chemical fiber industry.

Mr. Engelhardt replied that he was unable to provide figures of spending on research and development in the industry because such information is proprietary within each company. He added that recycling of man-made materials is of increasing interest worldwide and that about 3 million tons of polyester are produced from recycled plastic bottles in China alone.

The delegate of ARGENTINA asked Mr. Engelhardt to indicate trends in per capita consumption of polyester in the least developed countries with high levels of poverty. Mr. Engelhardt said that manmade fiber production is capital intensive, however some emerging markets such

as Vietnam are expanding their capacities. He said production capacity in Vietnam increased from zero to 200,000 tons in a year. Dr. Plastina commented that the Secretariat issues an annual report on world textile demand, which indicates that with rising incomes polyester consumption rises faster than consumption of cotton for low-income countries. He added that as per capita incomes rise to the levels of middle and upper income countries, consumers have more discretionary income and demand for cotton improves.

The delegate of ARGENTINA congratulated Dr. Chaudhry for his report on the cost of production, indicating that income in rain-fed cotton production is higher than in irrigated production. However, the delegate pointed out that this should not be interpreted as a policy suggestion for governments, since weather risks associated with rain-fed production may justify investments in irrigation. The Secretariat agreed with the delegate that differences in rain-fed and irrigated incomes in a single season should not be interpreted as a policy suggestion. It was noted that because cotton is drought tolerant it is often grown in arid conditions, and that irrigation from ground water sources may be necessary to maintain yields.

The delegate of MALI said that producers in African countries closely monitor price fluctuations and production depends on the level of prices. He indicated that the current positive evolution of prices could allow Mali to implement privatization of the industry successfully. He asked how long the current trend would continue and whether prices are expected to decline in the near future. The Secretary General said that cotton prices could not remain high for long periods. He indicated that every time prices had reached 90 cents per pound during the previous four decades, they had declined during the next season.

The delegate of PAKISTAN asked the Secretariat to comment on the impacts of the rising cost of production, high volatility of cotton prices and competition between cotton with polyester on producers, consumers and others in the cotton value chain. The CHAIR suggested that delegates are in a better position than the Secretariat to comment on these issues.

The delegate of BRAZIL noted that forecasts for cotton prices made a year ago proved to be too low. He asked the Secretariat to comment on what we know today that we did not know a year ago that explains the current level of high prices. He also asked why highly environmentally unfriendly polyester production is acceptable to consumers while cotton is criticized for its impact on the environment, and he asked whether polyester is sustainable. Dr. Plastina replied that a year ago IMF predictions did not indicate that the world economy would recover as rapidly as it has. He noted that the resulting strengthening in demand for cotton was the

primary factor that has resulted in prices higher than those expected one year ago. He added that other factors, such as weather in some countries and policy decisions related to trade have also affected prices. Mr. Engelhardt replied that there is no alternative to polyester unless the world is willing to devote additional millions of hectares to cotton production. He estimated that the world would need to plant an additional 40-50 million hectares to cotton to replace polyester. He said that polyester is sustainable in the sense that there is no foreseeable limit on the supplies of the petrochemicals needed to produce it.

The delegate of PAKISTAN expressed concerns about the market interventions restricting exports implemented by India in order to protect its domestic textile industry. He said that interference in trade brings uncertainty and distortions to the international market. He reiterated concerns that had been voiced in 2009 in Cape Town that in a closely integrated cotton economy, countries need to avoid the use of protectionist measures. He said that it is well understood that protectionist measures lead to uncertainty, volatility, and distortions to trade.

The delegate of POLAND summarized research showing that natural fiber apparel and bedding promote better health and rest. She pointed to the need to promote the positive effects of cotton on a human body and the negative effects of polyester.

The delegate of NIGERIA urged the Secretariat to carefully examine the results of its cost of production study indicating higher net incomes in rain-fed areas in comparison with irrigated areas. He pointed to effects of Bt cotton introduction in India leading to higher yields.

The delegate of CAMEROON asked the Secretariat to supplement the information provided on price volatility and price projections with information on the evolution of exchange rates, for example the changes in the rate of the U.S. dollar to the euro. The Secretary General noted that information on exchange rates is available in the Secretariat's written reports. Mrs. Gruere said that we cannot make projections for exchange rates fluctuations, but she showed a chart portraying trends in the price of cotton expressed in various currencies.

The delegate of SUDAN suggested that more information on price fluctuations of other commodities, especially food commodities, should be provided so that it helps cotton producers to make better planting decisions. He asked if the increased price volatility could affect the 95% confidence interval in the ICAC price model results. He also asked the Secretariat to comment on the cost of production of Bt cotton in comparison to conventional cotton. Mrs. Gruere replied that the Secretariat monitors fluctuations of prices of competing commodities, and the Secretariat consider the price ratios of these commodities to cotton at the time of planting

of significant importance in estimating changes in area. She noted that the projected increase in cotton production next season could lead to lower prices. Dr. Plastina said that the ICAC price model was introduced in 2008 and the first year projections were just 4 cents per pound off the actual. During the succeeding years the difference between projections and actual prices widened significantly because of unforeseen developments, such as the economic recession and succeeding faster than expected recovery. He said that the model explained 85% of factor variability initially, but now this percentage has declined to 82%, and he agreed that additional study of factors affecting cotton prices is necessary. Dr. Chaudhry replied that the cost of production using cotton varieties with biotech traits could be lower than the cost of conventional cotton production in some countries, the same as conventional cotton production in other countries, or even higher than conventional cotton production in other countries. He noted that some farmers are using biotechnology only for environmental reasons.

The delegate of COLOMBIA noted that China has the highest cost of cotton production and the most competitive textile industry, and she suggested that that paradox could only be explained

by the undervalued Chinese currency. She suggested that the Secretariat should make an effort to provide ratios of exchange rates of producing and consuming countries. She noted that there is a substantial difference between rain-fed land in Brazil and rain-fed areas in sub-Saharan Africa in terms of productivity.

The delegate of INDIA suggested that a volatility model should be looked at as a crash in cotton prices could happen. He proposed that the Secretary General should convene a special meeting between producing and consuming countries during the plenary meeting to discuss the issue of price volatility. He also urged the Secretariat to monitor price volatility closely. The Secretary General assured delegates that the Secretariat monitors volatility of cotton prices closely. He said that he would meet with the delegate of India and the Chair of the Standing Committee to discuss the possibility of a special session devoted to price volatility.

The delegate of the USA noted that market transparency is the key to lower price volatility. He said the U.S. supports the role of the ICAC in providing objective information. He said the USDA is also provides a wide range of market information which serves to lower market vola-

tility. He said the U.S. supports the statement by the delegate of Pakistan against market interference by governments that restrict cotton trade, thus contributing to price volatility.

The delegate of EGYPT suggested that the Secretariat should closely monitor per capita consumption of cotton and of other fibers. The delegate expressed his view that speculation in the cotton market is contributing to price volatility, and he suggested that the Secretariat should study this matter further.

The delegate of INDIA responded to the delegate of the USA, saying that price volatility requires government intervention and that government officials must balance competing interests when making policy decisions.

The CHAIR thanked the members of the Panel for their presentations, and he thanked participants for the excellent discussion.

The CHAIR adjourned the meeting at 13:55 hrs.

[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

Progress Toward Industry Harmonization and Standardization

9:00 hrs. Saturday, September 25, 2010

Mr Manfred Schiefer in the Chair

The CHAIR Introduced Mr. Andrew Macdonald, Chair of the task force on Commercial Standardization of Instrument testing of Cotton (CSITC) to present a report on the progress towards industry harmonization and standardization. Mr. Macdonald explained that standardization applies to many facets of our daily lives, such as time, so why not standardize our cotton business. He suggested that it should be started with standardizing instrument classing of cotton and with introducing technology worldwide to ensure consistent results. He noted that variances in cotton itself depend on many factors such as the height of the cotton plant, soil, weather, rainfall and bailing of cotton. Mr. Macdonald described that the objectives of CSITC are to ensure that instrument testing of cotton develops with repeatable and reliable testing methods utilizing standardized procedures for the benefit of the cotton industry and will assist developing countries to meet requirements of standardized instrument testing. He pointed out that the CSITC aims at upholding standards and tolerances for integrity of high quality testing, to replace traditional descriptions of cotton with instrument test values and to encourage trading of cotton based on instrument data.

Mr. Macdonald explained that the CSITC decided to separate two distinct areas working together: the variances between test centers, and variances that occur naturally in a cotton bale. He explained that laboratories participating in the CSITC Round Trials receive similar sets of five cotton samples from the USDA. Mr. Macdonald reported that there were 14 round trials since 2007, with a record participation of 70 labs and 93 instruments in 2010. He noted that today there is a need to increase the number of participants to expand confidence in instrument testing through this standardization. He concluded that cotton trade needs to adopt instrument classing for commercial transactions and eliminate old fashioned descriptions. Mr. Macdonald's presentation is a statement of the meeting.

The CHAIR introduced Mr. Andrei Guitchounts to present a report from the Secretariat on current phytosanitary requirements for cotton. Mr. Guitchounts reported that the Private Sector Advisory Panel (PSAP) asked the Secretariat to gather information on phytosanitary requirements for cotton in major importing countries in an effort to standardize documentation. He said that information on phytosanitary requirements in 35 countries was collected, including major importers. He said there is a wide variance in phytosanitary requirements. He noted that ten

countries do not require phytosanitary certificates, and nineteen countries require fumigation. Mr. Guitchounts informed that time limits for phytosanitary certificates differ from country to country, for example Bangladesh requires that the certificate be issued not later than 72 hour after fumigation, while in Turkey the certificate must be dated before the bill of lading and should not be older than 14 days. He said that in Vietnam the certificate must be issued just before shipment, while In Colombia it is valid for three month. He noted that different chemicals for fumigation are stipulated in countries' phytosanitary requirements: in Bangladesh and Thailand Gilphos 56% (Aluminium Phosphate) should be used, while in Pakistan and Russia, methyl bromide is stipulated for fumigation. Mr. Guitchounts concluded that there are no uniform requirements for phytosanitary certification and fumigation in many importing countries. Mr. Guitchounts' presentation is a statement of the meeting.

Mr. Wellman reported that the Bremen Cotton Exchange (BCE) adopted trading rules of the International Cotton Association in 2008, only arbitration procedures remain different because of different national laws and jurisdictions applied by the associations. He said that in 2009 the BCE introduced instrument arbitration into

the rules as a part of quality arbitration and the real challenge now will be to define tolerances and value differences, and value differences are adjusted from time to time by a committee based on market conditions. He noted that issues of commercial value of quality characteristics are being discussed at the CSITC. Mr. Wellman reported that other associations have also adopted the trading rules of the ICA and the next step should be to extend harmonization into the ICA bylaws, which could be achieved in the nearest future.

Mr. Grover commented that harmonization of trading rules is important for importing and exporting countries and that governments should play a role in achieving it. He praised the CSITC for the work they do on the standardization of test results.

Mr. Kotak pointed out that the International Chamber of Commerce has a set of trading rules called INCOTERMS, and that cotton associations should look at those.

Mr. Wellman said that rules of cotton associations refer to INCOTERMS, which are updated every 10 years.

Mr. Fok asked if China plans to introduce instrument testing, and he also asked if two different sets of rules are used for FOB exports and CIF imports.

Mr. Knowlton said that China has 370 HVI lines and plans to implement 100% of HVI testing.

Mr. Wellman replied that companies may use any set of rules they like in their transactions, but delivery terms of FOB and CIF could be based on the same set of rules.

The delegate of COLOMBIA asked if the 63 laboratories participating in the CSITC round trials mean that there are 63 countries participating

Mr. Drilling said that he can not say how many countries participate, but most of the participating labs represent production and to a lesser degree research and spinning.

The delegate of ARGENTINA highlighted the importance of this work on harmonization for producers, consumers and traders. He noted that Argentina has not yet implemented instrument testing but is aiming to achieve it. He described the Cotton Fiber Quality program run by the Ministry of Agriculture, which will develop a system of digital traceability and transparency facilitating market participants. He praised the work done by the CSITC and called for continuity of these efforts.

Dr. Ethridge commented that standardization of instrument testing of cotton requires the imposition of an adequate and transparent system of process and quality controls. He said that 9 requirements must be met: 1. Machine error must be minimized by engineering; 2. Cotton samples must be representative of the entire bale; 3. Ambient conditions in diverse labs must be kept stable at targeted levels; 4. Equilibrium moisture content must be achieved in samples; 5. Calibration process must be adequate and consistent among the satellite HVI facilities; 6. Calibration of satellite HVIs must be frequently verified; 7. Cotton standards used for calibration must be exceptionally homogeneous; 8. Bale records must be accurate, and samples delivered and tested quickly; 9. Certification of bale identities and fiber property data must be reliable and must be communicated in a timely manner. He said that an appropriate legal authority could do a credible oversight, and that the authority did not necessarily have to be a government agency. Dr. Ethridge's report is a statement of the meeting.

Mr. Macdonald noted that these 9 points are prerequisites for achieving good results in the CSITS round trials. He also was pleased to hear that the program of quality testing implemented by Argentina will benefit growers in that country.

Dr. Ethridge noted that the system of testing works in the USA because the producer remains the owner of cotton fiber through the process of ginning, while in some other countries producers sell see cotton before HVI tests are conducted

ant that could be a limitation on objective pricing of cotton.

Mr. Drilling commented that the USDA Check Test system, the Bremen Round Trials, and the CSITC Round Trials have three separate purposes. He said that the CSITC round trials are the most important. The Bremen round trials are inclusive of other instruments in addition to HVI. He said that the USDA's check tests are done on two samples every month, and provide much data, but their purposes are different from those of CSITC.

Dr. Ethridge said that his lab participates in the CSITC trials and considers them important and the resulting diagnostic data worth the expense and time required for participation.

Noting that there were no additional comments, the CHAIR recognized the Secretary General to discuss other business.

The SECRETARY GENERAL apologized for a mistake made the previous day in paragraph 2.2 of the Final Statement, where it was said that the production had doubled, which is not right. He proposed to replace the word "doubled" with the word "increased." There were no objections.

The SECRETARY GENERAL proposed that paragraph 1.1 of the Report of the Committee on Cotton Production Research referring to efforts in Turkey to lower the costs of production be rephrased later at the request of the Turkish delegation.

The delegate of COLOMBIA said she had misgivings as the statement had been adopted by the plenary and cannot be changed without convening another meeting of the Steering Committee.

The delegate of ARGENTINA supported the delegate of Colombia and stated that there should be no precedent for changing the text of the statement after its adoption by the Steering Committee.

The SECRETARY GENERAL withdrew his proposal for amending the text of the statement.

The session was adjourned at 10:35 hrs.

Closing Session

11:00 hrs. Saturday, September 25, 2010
Mr. Wallace Darneille in the Chair

The CHAIR recognized the delegate of ARGENTINA and asked him to come to the podium. The delegate thanked the ICAC for the opportunity to host the 70th Plenary Meeting in Buenos Aires during September 4-9, 2011. He thanked the Government of Switzerland for agreeing to host a meeting at a later time, thus allowing Argentina to host the 70th meeting.

A video invitation with panoramic views of

Argentina and the city of Buenos Aires were shown.

The delegate indicated that the Ministry of Agriculture, Livestock and Fisheries would serve as the host organization within the Government of Argentina. He communicated the best regards of Minister Julian Dominguez and Secretary of State Carla Campos Bilbao. He noted that Argentina, once was famous for its military coups, is now achieving 3 decades of democratic government. He said that a country infamous

for its human rights record is leading the way confronting the past with justice and truth while building a tolerant and respectful society. And, he noted that Argentina is a leading agricultural country in the world. He noted that production is rising fast, with fewer farmers, and technological change is accelerating replacing labor. Argentina strongly believes there is a need for an active state to intervene in this process to minimize the negative social consequences and to ensure that the wealth generated by agriculture benefits the entire population.

In particular, the delegate noted that soybeans and cotton are competitive for land and price ratios between the two determine farming allocations. He said that in Argentina, large capital intensive cotton farming coexists with approximately 19,000 small holders producing cotton, and the inclusion of all farmers is a key element of public policy. He noted that there are substantial policy issues debated in Argentina, and that there were many activities to feed the brain, the heart and the spirit. He invited all countries to the beautiful and cosmopolitan city of Buenos Aires in September 2011.

The CHAIR thanked Argentina for the gracious invitation. He observed that the invitation was accepted.

The CHAIR invited the delegate of TURKEY to give closing remarks on behalf of all delegates. The delegate of TURKEY expressed thanks to the Organizing Committee, the Government of the U.S. and the City of Lubbock for their hospitality and organization. He said that the ICAC meeting had been fruitful, including discussions on sustainable cotton production, the impacts of social and environmental standards on demand for cotton, and the insights from cotton buyers

on the future demand for cotton. The delegate called on all members of the WTO to renew efforts to complete the Doha Round to pave the way for increases in world trade in textiles and clothing. He noted that the theme of the meeting, "Cotton Growth Through Global Unity" was well chosen since discussions during the week had focused on issues related to both production and consumption. The delegate thanked the Government of Argentina for their invitation to host the 70th Plenary Meeting and said that he looks forward to attending.

The CHAIR recognized the delegate of EGYPT who expressed his gratitude to the people and governments of Texas and the USA for their hospitality, and the friendship and charm of the City of Lubbock. He expressed his thanks to the Organizing Committee, the Secretariat, delegations and observers for contributing to a successful meeting.

The CHAIR recognized the delegate of UZBEKISTAN who expressed his gratitude for a successful meeting. He noted that Uzbekistan had cooperated with the ICAC for nearly two decades and that this brings great benefit to his

country. He said he looks forward to visiting Argentina next year, and he invited all participants to attend the Uzbek Cotton Fair during October 13 and 14, 2010 in Tashkent.

Seeing no other delegates who wished to make comments, the CHAIR gave closing remarks on behalf of the United States. He thanked the persons in the United States who had organized the meeting, and he expressed his appreciation to the sponsors. He reiterated the welcome of the Government of the United States to Mozambique as a member of the ICAC. He summarized the discussions that had occurred during the week, including those on protecting cotton's image in the world market, discussions of the role of new technologies in maintaining the competitiveness of cotton, strategies to lower the costs of production, and the role of standardization and harmonization in improving efficiency in cotton production, handling, trading and processing.

The CHAIR concluded by thanking all delegates for their participation in the 69th Plenary Meeting and he declared the meeting adjourned at 11:35 hrs.

Meeting of the Steering Committee

19:10 hrs. Friday, September 24, 2010
Mr Azmat Ali Ranjha in the Chair

The CHAIR referred to Working Paper I. He reported that Mr. Patrick Packnett of the United States had been nominated by the Standing Committee to serve as Chair during the period from the 69th Plenary Meeting to the 70th Plenary Meeting. He added that Ms. Lily Munanka of Tanzania had been nominated to serve as First Vice Chair and Mr. François Schmidt of Switzerland had been nominated to serve as Second Vice Chair.

The CHAIR asked if delegates supported the nominations made by the Standing Committee, and seeing approval, he found the nominations were approved.

Working Paper I "*Election of Standing Committee Officers*" is attached.

The CHAIR asked the Secretary General to review the contents of Working Paper III. The Secretary General reported that two countries were more than two years in arrears in their payment of assessments to the Committee, and if payment were not received in a timely fashion, membership would be suspended. He thanked all other countries for timely payment of assessments.

The CHAIR noted that the work of the Drafting Group had been completed only minutes earlier.

He asked for unanimous consent to dispense with a reading of the Statement of the 69th Plenary Meeting prior to approval. On a motion by BRAZIL, supported by ARGENTINA and other countries to dispense with reading the Draft Statement, the Chair found that there was a consensus to approve the Statement of the 69th Plenary Meeting as completed by the Drafting Group. The Secretariat was instructed to distribute the Statement of the Meeting.

Seeing no other business, the meeting was adjourned at 19:25hrs.

ATTACHMENTS

Working Paper I

Election of Standing Committee Officers

Recommendation from the Standing Committee

A Nominating Committee met on 5 May 2010, and proposed a slate of officers for the Standing Committee for 2010-11. Delegates from Belgium, China (Taiwan), Germany, Spain, the USA and the executive director attended the meeting. Mr. James Johnson of the U.S. was asked to serve

as chair of the Nominating Committee.

The Rules and Regulations specify that officers of the Standing Committee shall be elected for one year. In exceptional circumstances, they may be reelected for one additional term. 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. Patrick Packnett, Assistant Deputy Administrator, Foreign Agricultural Service, USDA, will be able to serve as chair in 2010-11. Accordingly, there was a consensus to nominate Mr. Packnett as chair. The current second vice chair, Ms. Lily Munanka, Head of Chancery, Embassy of Tanzania, also expects to be available in Washington during 2010-11. Accordingly, there was a consensus to nominate Ms. Munanka as first vice chair.

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

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

After consideration of these factors, the Nominating Committee agreed that Mr. François Schmidt, Counselor, Head of the Commercial Service, Swiss Business Hub, Embassy of Switzerland, should be nominated to the post of second vice chair. Mr. Schmidt has indicated that he will be able to serve as an officer next year.

The nominations received provisional approval from the Standing Committee at the 505th meeting on May 27, 2010.

Accordingly, the Standing Committee proposes the following slate of officers to the Plenary Meeting for the period from the end of the 69th Plenary Meeting in 2010 to the end of the 70th Plenary Meeting in 2011:

Mr. Patrick Packnett, USA, for Chair,

Mrs. Lily Munanka, Tanzania, for First Vice Chair.

Mr. François Schmidt, Switzerland, for Second Vice Chair

Working Paper II

Topic of the 2011 Technical Seminar

Proposals from the Secretariat to the Committee on Cotton Production Research

The following themes are suggested as possible topics for the 2011 Technical Seminar:

Technological Innovations for Sustainable Development of the Cotton Value Chain

Sustainability is at the core of all issues related to cotton production whether realized or not. All the technological innovations, including even insecticides that are so disliked now, were adopted for the sake of improving the sustainability of cotton production and consumption. However, too much emphasis on any one of the three pillars of sustainability—economic, social and environmental—compromises other pillars. New developments must balance the requirements of all three pillars of sustainability. The topic, ‘Technological Innovations for Sustainable Development of the Cotton Value Chain’ could include topics such as crop management and plant protection, sustainability of small producers and family farms, fiber quality, net income, processing without losing fiber value and sustainable methods at spinning mills.

What is the Impact of Biotech Cotton?

Biotech cotton was commercialized 15 years ago, and the area planted to biotech varieties in the world surpassed half of the total cotton area in 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. Lower costs, lower pesticide use and higher yields are the primary expectations from the insect resistant biotech varieties. On the other hand critics of the technology continue to disagree not only on the potential benefits, but also on the future uses of biotechnology in cotton. Biotech varieties are yet not eligible for organic

certification. It is expected that improved fiber quality, enhanced agronomic characteristics and other improvements will follow the development of insect resistant and herbicide tolerant features. Fifteen years are enough to critically analyze the impact of biotech cotton from various angles including changes in research programs and impacts on farmers’ lives.

Insecticides and Their Use on Cotton

Plant protection chemicals worth US\$40 billion were used in agriculture in the world in 2009. Cotton accounted for 6.2% of total plant protection chemical sales. Out of US\$2.5 billion spent on plant protection chemicals to grow cotton in 2009, 58% was spent on insecticides. The share of insecticides used on cotton compared to insecticides use (by value) in agriculture except cotton has been continuously on decline. Insecticides used on cotton accounted for 19% of world insecticide use in 2000, but cotton declined to 14% of the world total in 2009. Countries are finding ways to control insects without the use of chemicals. The deleterious effects of chemicals are better understood today than they were in the past. Insecticides not only increased production costs, but they also gave rise to serious problems such as resistance and changes in the pest complex. Consequently, insecticides became a threat to the sustainability of cotton production in the world. Although 25% decline from 19% to 14% in cotton’s share of world insecticide use (by value) in nine years is satisfactory, the trend must continue. How additional reductions in insecticides use in cotton production can be achieved and accelerated could be the topic for the 2011 Technical Seminar.

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Round Table

Water Use Efficiency, Lessons from Texas

14:30 hrs. Monday, September 20, 2010

Moderator: Mr Bill Harris

Water is a scarce commodity and requires careful use, which can be achieved through a variety of means. A Round Table discussion held on September 19, 2010, prior to the formal inauguration of the 69th Plenary Meeting, recognized that water use efficiency should be improved by adopting efficient delivery systems, improved management and performance of systems and reduced “non-water” production limitations.

A speaker from the Texas Agri-Life Research Service stated that half of the water supply in Texas comes from surface collection, while the rest is met from underground water. In Texas, 23% of the water used in agriculture is used to

grow cotton. Because of the fact that chemical use on cotton increased during 1970 and 1980s, various agencies are continuously monitoring underground water with respect to residues from plant protection chemicals and fertilizers. Results show that thanks to farmers’ vigilance, underground water does not show any signs of increased use of chemicals on crops.

The discussion during the session indicated that no one system of irrigation can be recommended for all countries, mainly because of variations in soil types. Some systems, like sun-surface drip irrigation and sprinkler irrigation, are superior in water use efficiency but they are too expensive to be installed. Biotech varieties that will require less water to mature could further save

water use on cotton, but it is uncertain when such varieties will become available for commercial adoption.

Cotton has done very well with respect to water use in recent decades. Farmers are now producing 3-4 times higher quantity of more cotton now with the same quantity of water used 40 year ago.

There was a consensus that farmers should use appropriate irrigation methods, depending upon soil conditions. They should strive to eliminate water run off, and governments must monitor the status of underground water. Water use efficiency is an important issue for agriculture and will also be discussed at the World Cotton Research Conference-5 to be held in India from November 7-11, 2011.

First Breakout Session

Improving Industry Efficiency in Storage, Transportation and Handling

9:00 hrs. Thursday, September 23, 2010

Mr Greg Wakefield in the Chair

Panel Members:

Mr. Steve Dyer
Mr. Juan Restrepo
Mr. Les Lewis
Mr. Brett Underwood
Mr. Rick Shepherd
Mr. Alan Adamson
Mr. Peter Barnard

Container and Vessel Availability

Cotton is competing globally with other agricultural products for container and vessel space. Cotton’s dilemma is that it cannot forecast future rates where as other products are usually sold prompt which allows for flexibility in pricing. Given that shipping lines are now also looking to exit the chassis business, it will add further strain on cotton movement. Inland cotton moves will therefore become more expensive and may necessitate that cotton be moved and stored nearer to the ports. As such, it will be necessary to look at alternate ways to move cotton in the future. Flatbed trucks or rail may alleviate some of the strain. On a positive note, shipping lines do need cotton loads to balance their vessels. We therefore believe that cotton will remain a strong product for the lines to carry.

Vessel rotation needs to be monitored closely. Should the world economies show stronger signs of rebounding, we may see an increase in vessel availability. However should the economies further decline, one could see additional vessels

being pulled from rotation. The larger issue will remain the availability of containers.

Recommendations

Industry must closely monitor container availability and continue to promote cotton as a viable and necessary product for shipping lines to carry. Alternate methods of inland transportation need to be reviewed with an emphasis on warehousing at or near ports.

Warehousing

Shipments often are delayed due to logistical issues at interior warehouses. These are caused by a variety of reasons, congestion and multiple load-out orders being the main issues. Electronic Warehouse Receipts (EWR) have alleviated some of these delays. EWR provides accurate storage locations and detail, which allows the warehouse to be more efficient. Cotton can therefore be staged correctly, which improves the efficiency of the warehouse.

Recommendations

Communication between channel partners needs to be improved. This can be achieved by ensuring warehouse receipts detail the storage location of lots for the warehouseman. Timely reporting of shipping instructions will allow for better picking and staging of the bales. Communication between trucking lines and warehouses to provide accurate pick up times will also allow for faster turns and improved efficiency.

Documentation

Documentation issues continue to cause importers problems. This is directly affected by transit times. The shorter the transit time, the more difficult it is to ensure all the documents are in hand to satisfy LC requirements. This is particularly an issue with 3rd party providers especially with phytosanitary certificates. Currently each importing country has specific requirements with regard to the phytosanitary certificates, especially when the documents are a governmental import requirement. There is no uniformity within the industry as to what documents are required for the export and import of cotton.

Recommendations

Emphasis must be directed toward importing countries to standardize documentary requirements. Additional efficiencies could be achieved if importing countries would allow for certain documentary requirements to be excluded from LC requirements and allow their presentation at a later time prior to customs clearance.

Summary

Each exporting country faces a myriad of issues, as does each importing country. There is not a “quick fix” to improve the efficiency of the movement of cotton. However by improving communication between channel partners, by prompting investment in infrastructure, and by aligning governmental import/export documentary requirements, the overall efficiency of the industry will improve.

Second Breakout Session

Demand Enhancement: Building on Successful Efforts

11:00 hrs. Thursday, September 23, 2010

Mr. Jeffrey Silberman in the Chair

Panel Members:

Mr. Mark Messina
Mr. Allen Terhaar
Ms. Paula Rosario
Ms. Felicia Eugene

Cotton Promotion Workshop 2010

Key points of the discussion

- The speakers highlighted the fact that many promotional efforts are run on low budgets, but all initiatives require previous market research to achieve success.
- Cotton Incorporated is committed to global generic promotion of cotton.
- Impact measurement (through surveys, count of participants, etc.) is critical to inform future campaigns.
- It is important to include new social media in promotion campaigns.
- Recycling programs help raise the positive profile of cotton.
- It is critical to work with signed contracts when developing promotion partnerships to avoid confusion.

Paula Rosario and Felicia Eugene presented the Cotton Incorporated approach to cotton promotion, which pursues increasing demand and profitability of cotton through consumer marketing, advertising, strategic alliances and public relations. The speakers highlighted the fact that many promotional efforts are run on low budgets, but all initiatives require previous market research to achieve success. Impact measurement (through surveys, count of participants, etc.) is critical to inform future campaigns.

The Fabric of Our Lives campaign targets female shoppers of 13–24 years of age. The campaign involves different singers, performing the song “Fabric of Our Lives” in their own styles, and sharing their point of view on how cotton influ-

ences their fashion choices. The campaign was originally launched through broadcast, expanded to retail first, and then online through new social media. Through strategic alliances with shopping malls and fashion retailers, the ad campaign was brought to where people shop, and targeted mid-range income consumers. Several strategic tools were used in this campaign: signs, displays (such as walk-in closets), and incentives to generate interest in the campaign, with premiums such as small denim bags and discount coupons at retailer stores. Online, the campaign is still carried on through www.thefabricofourlives.com and the Cotton Facebook page. Fifty-one million people were reached by the campaign *The Fabric of Our Lives*.

Cotton Incorporated discussed their “Blue to Green” recycling program, where people are asked to donate their old jeans for recycling into insulation material, improving the sustainability profile of cotton. Five hundred pairs of jeans are required to insulate one average size house in the United States. The target population is university students. Through a partnership with Gap, Inc., donors of old jeans received a discount on their next purchase of new jeans. The insulation material produced through this program was used in 180 houses in the Gulf region battered by hurricane Katrina.

In the United States, cotton producers and retailers finance the promotional efforts carried out through Cotton Incorporated and Cotton Council International.

The speakers suggested that promotion on smaller budgets might use one large sign for one message, one three-sided sign for more than one message, models or mannequins, partnerships to increase the available budgets, handouts and fliers, and sound or electronic signs to attract with other senses. Borrowing clothes from nearby retailer is one way to reduce costs. However, it is critical to work with signed contracts when working with promotion partnerships to avoid confusion. Using incentives such as key chains,

t-shirts, etc., creates an opportunity to add a message or logo to increase exposure. Incentive items should be useful items, in order to appeal to the consumer. Where internet is available, websites, e-mail lists, social media (e.g., Facebook) and blogs should be used to help promote cotton, and multiply the number of exposures.

When promoting cotton in developing countries, it is important to identify where the mid- and upper-income level consumers shop, as they are usually cotton’s target customers. Consumers will respond well to trying on and feeling cotton clothes, and the use of radio broadcast stations to promote cotton is effective in drawing consumers to retail.

If the available budget allows, signing events with celebrities from soap operas and music stars willing to talk how cotton influences his/her fashion choices can be an effective strategy, given the massive audiences that follow soap operas. In Asia, campaigns involving celebrities receive strong media attention.

Another important target population is fashion design and fabric development students, who will influence the choice of fibers in the industry later on in their careers.

Cotton Incorporated, Cotton Council International and the International Forum for Cotton Promotion are eager to share their experiences in promoting cotton in developed and developing countries with all interested parties.

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.
- The work of the IFCP is significant and important, and should continue.

Third Breakout Session

Cotton Price Risk Management in the Post Recession Age

11:00 hrs. Friday, September 24, 2010

Mr. Herman S. Kohlmeyer, Jr. in the Chair

Panel Members:

Mr. Steven Chen
Mr. Wallace Darneille
Mr. Antonio Vidal Esteve

A broad range of issues was discussed, with little disagreement among the panel and the audience on any subject. The most fundamental of all questions started the session: do these record prices reflect the supply/demand situation or are they mostly driven by speculative fever.

The panel agreed that better-than-expected business, particularly in China and India, plus the prospect of lower-than-anticipated crops are jointly the primary causes of this market’s rise. The possibility of surprisingly low ending stocks is just beginning to work into the equation. Certainly speculators are driving prices,

but they are simply capitalizing on this current state of affairs.

The increase in market volatility raises the possibility of significant financial stress, but it is unavoidable. The market can still be used by producers and it is a necessary tool in fixing prices for textiles mills around the world. In fairness, almost the entire world revolves around the price-discovery function of the Intercontinental Exchange (ICE).

There was absolutely no sympathy for exchange margins being set on the value of synthetics should the futures markets lock at the limit. Synthetic trading via options may prove to be an appropriate escape valve for traders, but the decision to use synthetic values in March 2008 proved to be a disastrous decision for the cotton trade. There has been no parallel for such a decision in any of the other futures markets, even though such a tool is available to them. It was unanimously hoped that the Exchange never again comes to such a decision. The futures market in the first few days of March 2008 did not discover price. Instead, what the market discovered was the over-indulgence in the use of options and the inability of certain firms to manage their risks. The escalation in the futures had no relationship to the price of cotton, unlike what we are seeing in the current record-setting market.

The question was raised as to whether the cotton community would welcome a futures market with no limits, such as is the case in the cocoa, coffee and sugar markets. As could be expected, there was no one in favor of such a move, which would certainly be a radical departure from a tradition that has served the trade well.

There was little enthusiasm for the new exchange model of computer trading, absent of the traditional community of floor brokers. Although it would be expected that many older members of the audience would miss the old ways, it was surprising that there were no younger voices raised in favor of the new model.

The possibility of taking the contract to another futures market was discussed, and some of the efforts to do just that after the debacle two years ago were outlined. There was no sentiment that such a move in the contract market could be successfully achieved. The industry has made its peace with the current business model.

Questions were raised about the influence on traders of the futures market in China and the desirability of other parallel markets.

There is no doubt that all eyes are on the Chinese market, which has an obvious impact of prices around the world. Traders in that part of the world view those prices constantly during the day. There are no other futures markets with any impact at all.

At the same time, there was an absence of any inquiries or appeals about starting similar markets elsewhere. Such an effort had been made in Brazil, with very little success. The failure of that market to get established has certainly dampened the enthusiasm to try to start similar markets in other parts of the world. In other words, if a new market cannot be built in Brazil, and for good reasons, it probably cannot be built elsewhere. There is no doubt that modern communications has made our business community One World in every sense of that phrase. Futures markets in generations past, in places as widely spread apart as Liverpool, Alexandria, and Bombay made sense in their time. The immediate flow of information, as well as prices, has made the accessibility of the New York market an appropriate solution for almost all elements of the trade. In truth, a trader in the middle of Asia can enter an order as easily as a trader in Memphis, and it will reach the Exchange is almost precisely the same time.

Whether the new model of the exchange, with computers replacing people, is a welcomed improvement was not clear to everyone. However, there was no sentiment for reversing the recent developments. That just does not seem possible.

In summary, the discussion remained very collegial and pleasantly free of controversy.

Fourth Breakout Session

Best Practices in Cotton Ginning

13:45 hrs. Friday, September 24, 2010

Dr. Thomas D. Valco in the Chair

Panel Members:

Mr. Ed Hughs
Dr. Rick Byler
Mr. Ross Rutherford
Mr. Sunil Bajaj
Mr. Trevor Wicks
Mr. David Mrozinsky

The panel members represented a wealth of expertise in ginning research, manufacturing, and operation from many cotton production regions.

It was stated that the gin's primary function is to condition the cotton; separate the lint, seed and trash into different processing streams; and create a marketable unit for shipping to textile mills. The panelists identified 6 areas of best ginning practices to address. These included equipment selection and operation for efficient processing, quality preservation, proper maintenance, operation and safety training, transitioning from handpicked to machine harvested cotton, and contamination prevention.

The panel recommended that ginners frequently monitor ginning equipment adjustments and operational parameters to provide the best quality cotton in the most cost efficient manner. Ginners should look for excessive fiber damage and/or prep at the bale, examine the seed for residual lint or tags and look closely for lint or seed cotton in the trash pile, these are all sign of poor equipment adjustment or operation.

The panel agreed that down time or operational slowdowns are very costly and must be reduced to improve efficiency and reduce ginning costs. The panel recommended scheduled maintenance programs, proper equipment sizing, and matching capacities, extensive worker training to improved operation and maintenance procedures. Gins should log any breakdowns, recording the duration and cause, and address these problems during scheduled maintenance periods or at the end of the season.

All panel members agreed that employee safety training and safety audits are critical in helping to prevent injuries as well as reducing liability for the company. It was urged that gin management provide workers with proper safety equipment

and strive to improve work conditions by reducing noise and dust levels.

Proper cotton moisture content is essential to efficient operation and fiber quality preservation. In many cases moisture restoration is needed to reduce static and improve machine performance while preserving quality. Careful attention should be given to the type of moisture restoration system, humid air or spray, and not allow bales with moisture contents greater than 8%. Color grade of bales with high moisture content will likely degrade during storage, causing problems at the mill.

Cotton cultivar has an influence on gin performance and best practices dictate that ginners reassess equipment performance when changing from one cultivar to another. It was recommended that ginners and cotton breeders collaborate to select / develop cultivars with improved ginning qualities such as less leaf and bract hairs and low fiber attachment forces.

There is increased interest in roller ginning upland (*G. hirsutum*) cotton to improved staple length and reduce short fiber content. Roller

ginning is slower than saw ginning but with new developments in high-speed roller ginning, processing rates will improve, making roller ginning more cost effective.

Many cotton production regions are beginning

to use mechanical pickers and gins will have to add additional cleaning, and drying equipment to process this machine picked cotton. One of the major sources of fiber contamination is the polypropylene bags used during hand picking, which should be eliminated or minimized with

machine harvested cotton. Large metallic objects that end up in the bale are a major problem for textile mills and best practices dictates that proper care is given at the gin to prevent this by inventorying of tools and machine parts throughout the ginning process.

Fifth Breakout Session

Best Practices in Instrument Testing

16:00 hrs. Friday, September 24, 2010

Mr. James Knowlton in the Chair

Panel Members:

Mr. Axel Drieling

Mr. Jean-Paul Gourlot

Mr. Steve Grantham

Mr. Dominic Mwakangale

James Knowlton opened the meeting by explaining that the idea of developing a single instrument-testing manual, based on the USDA and ITMF manuals already in use, had been proposed at the 68th Plenary Meeting in Cape Town (Sept. 2009). He reported that drafting of the manual began recently with the objective of creating a comprehensive best practices manual. Mr. Knowlton explained that the purpose of the manual was to provide labs using commercial high-speed instruments with a comprehensive document covering requirements and information in regards to instruments, procedures, equipment and facilities. Clarification was made that this manual and the work of CSITC focused only on commercial high-speed instruments. Requirements and information for other common instruments used by textile mills, such as AFIS, were not covered in this manual. In regards to the manual, it was noted that draft language had been started for only about half of the topic areas.

Steve Grantham then gave a presentation on recent developments in pertinent ASTM-I standards (ASTM International is a large voluntary standards development organization; www.astm.org). Standards discussed included those for instrument qualification (D-7410), moisture conditioning (D-1776) and basic instrument operation (D-5867). Mr. Grantham reported that work was progressing well and that all

documents were available at ASTM.org. Mr. Grantham encouraged labs to become members of ASTM-I (\$75 U.S. per year) in order to obtain written copies of the standards at no cost and to have a voice in the development of the standards. Mr. Knowlton added that these standards contained important best practice material that would not be thoroughly covered in the CSITC Best Practices Manual and that it would therefore be important for CSITC users to obtain these standards.

Jean-Paul Gourlot reviewed the table of contents of the manual and asked for input. A comment was made regarding the need for lighting requirements. It was noted that incandescent lighting should not be used due to excessive heat output and the impact this could have on moisture conditioning. It was agreed that lighting requirements would be added. Mr. Knowlton inquired about the current title of the manual (Guideline for Commercial Standardized Instrument Testing of Cotton). The current name of the manual is "Guideline for Commercial Standardized Instrument Testing of Cotton". Two suggestions were made regarding the title. One suggestion (coming from the CSITC meeting earlier in the week) was to add the word "Protocol" to the beginning of the title and the other (proposed at the breakout session) was to add the word "Best Practices" to the beginning. Another suggestion made during the breakout session was to leave the title as is. No clear decision was made. Mr. Gourlot continued by covering additional sections of the manual, which included Preamble, Introduction and Necessary Basic Requirements. It was explained that the text in the manual was divided into four categories: 1) Explanations, 2) Requirements, 3) Recommendations, and 4) More Information.

Axel Drieling then presented the requirements that had been drafted in the manual. Mr. Drieling explained that the requirements from the full comprehensive manual were in bold text with a box/border around them for the purpose of drawing specific attention. In addition, Mr. Drieling explained that the requirements would also be listed in a separate document to serve as a quick reference. The chapter on Atmospheric Conditions / Conditioning was used to illustrate the proposed document format. Mr. Drieling continued by covering requirements in the various chapters, including Sampling and Laboratory Environment with requirement sub-chapters for Electrical, Compressed Air and Space. The chapter on Atmospheric Conditions / Conditioning and its sub-chapters on Temperature, Humidity and Monitoring / Recording, Building / Laboratory Design, Air Management System and Design, Passive Sample Conditioning and Rapid Sample Conditioning. The remaining chapters and sub-chapters were not covered since text had not been drafted yet.

Dominic Mwakangale explained how the guidelines being created would be used to ensure a high level of testing performance in the East and West Regional Testing Centers (RTC) in Africa. Mr. Mwakangale explained how management standards such as ISO 17025 were being linked to best practices as covered in the manual. The RTC's of Africa are providing support to other testing laboratories in Africa by providing opportunities for training and round testing.

Mr. Knowlton stated that the Best Practices manual would be posted on the CSITC website. It was agreed that work should continue on development of the manual and that industry input was important as the content was developed.

DOCUMENTS

1. Report of the Chairman of the Standing Committee
2. Report of the Executive Director
3. COTTON: Review of the World Situation, July-August 2010
4. COTTON: World Statistics – September 2010
5. The Outlook for Cotton Supply in 2010/11
6. World Textile Demand – September 2010
7. World Cotton Trade – September 2010
8. Cost of Production of Raw Cotton - September 2010
9. THE ICAC RECORDER - September 2010
10. Report of SEEP - Study on: Pesticides Use in Cotton in Australia, Brazil, India, Turkey and the USA
11. Production and Trade Policies Affecting the Cotton Industry – September 2010
12. Directory
13. Procedural Matters for the 69th Plenary Meeting

WORKING PAPERS

- I. Election of Standing Committee Officers
- II. Topic of the 2011 Technical Seminar
- III. Uncollected Assessments of Member Governments of the ICAC

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First Vice Chairman

Minister Azmat A. Ranjha

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