



PROCEEDINGS

of the 70th Plenary Meeting



Public and Private Sector Roles in the Cotton Value Chain: Ensuring Both Efficiency and Fairness

Buenos Aires, Argentina
September 2011



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INTERNATIONAL COTTON ADVISORY COMMITTEE

PROCEEDINGS OF THE 70th PLENARY MEETING

**“Public and Private Sector Roles in the Cotton Value
Chain: Ensuring Both Efficiency and Fairness”**



ICAC
Washington DC USA

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Price: US\$40.00 (hard copy)
US\$65.00 (electronic version)

FOREWORD

At the invitation of the Government of the Republic of Argentina, the 70th Plenary Meeting of the International Cotton Advisory Committee was held in Buenos Aires, from 4-10 September 2011

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
Colombia
Côte d'Ivoire
Egypt
Finland
France
Germany
Greece

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STATEMENT OF THE 70th PLENARY MEETING

“Public and Private Sector Roles in the Cotton Value Chain: Ensuring Both Efficiency and Fairness”

The International Cotton Advisory Committee (ICAC) met in Buenos Aires, Argentina during September 4-9, 2011 for its 70th Plenary Meeting since the establishment of the Committee in 1939. Participation was 495, including representatives from 39 governments and 7 international organizations. The Committee welcomed the Government of Peru as its newest member.

1. The Secretariat reported that world cotton production is expected to increase in 2011/12, encouraged by the extraordinary rise in cotton prices to more than double the previous record that occurred during 2010/11. The Secretariat reported that cotton mill use is recovering from the steep decline during the global recession, and world cotton trade is rising with increased consumption. The Secretariat cautioned that stocks are estimated to rise during 2011/12, indicating a decline in cotton prices.

2. The Committee noted that price volatility had been record high in 2010/11 and that volatility imposes costs on all segments of the cotton value chain. Countries agreed that stronger national efforts to gather and report statistics on cotton production, consumption and stocks would enhance transparency and provide additional information for decision making. The Committee instructed its Secretariat to continue to analyze and report to governments on excessive speculation, defaults on contracts for trade in cotton, and other causes of cotton price volatility, including adoption of trade distorting measures by governments. The Committee recommended using metric measures to standardize statistics on cotton.

3. The Committee heard from experts on the subject of technology development and transfer. There was agreement that technology plays a central role in productivity enhancement. The role of the private sector in developing commercially viable technologies was applauded. The Committee agreed that the public sector has a crucial role to play in providing regulation and in facilitating technology development and extension, especially for small and medium sized producers. Cooperation between private and public sector researchers in an efficient research system is essential.

4. The Committee agreed that farmers' associations, organizations and cooperatives can increase access to inputs, improve marketing efforts and strengthen the voices of farmers. The keys to the success of farmers' organizations include strong and stable leadership, transparent and democratic governance, and voluntary membership with farmer ownership and control.

5.1. The Committee received information about organic cotton production systems. A report was received on the damage caused by a failed organic cotton program in which promoters had not provided adequate technical support and had abandoned smallholder growers when world market prices declined. However, examples of successful organic projects were also noted.

5.2. Specialists reported that organic production systems generally result in lower yields. Hence, for the small scale sector organic production systems can be considered if the cost of inputs is reduced, compensatory price premiums are received, and the net returns to growers per hectare are greater or equivalent to other production systems. There was agreement that all programs and projects designed to enhance organic cotton production should cooperate with regulatory authorities, operate transparently, and provide adequate technical support to growers.

6.1. The Committee received a report from its Private Sector Advisory Panel (PSAP). The PSAP called on government officials to improve collection and reporting of cotton statistics. The PSAP vehemently opposed the imposition of bans or limits on trade in cotton, especially bans or limits applied retroactively. The PSAP criticized industry players and trade associations seeking to take the cotton trade backwards through requests to governments for trade protection. The PSAP agreed that BCI recommendations for improved production practices are fine, provided that BCI does not encourage fragmentation of the cotton market.

6.2. The PSAP considered the risks of increases in defaults on contracts due to the negative impact of the volatility in the price. The PSAP urges governments and associations in the private sector to take more efficient measures in honoring the awards by reducing any legal obstacles and simplifying the procedures as well as taking adequate measures to prevent defaulters from providing further business. The PSAP urged governments to reduce legal obstacles and simplify procedures for the enforcement of arbitral awards.

6.3. The PSAP encouraged governments to adopt the FAO model phytosanitary certificate used for trade in cotton, and the PSAP noted that harmonization of electronic bills of lading would simplify the documentation required for trade in cotton.

7. The Committee also received a report from its Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP). SEEP reported that it is working to update a report on pesticide use in cotton and to release a new report on the components of labor costs in cotton around the world. SEEP thanked member governments for providing the data necessary for its work.

8.1. The Committee heard from a member of the WTO Secretariat that the Doha Round seems to be deadlocked. Nevertheless, the Committee affirms that the Doha Round cannot be allowed to die because its issues remain important and must be resolved. The Committee underscored the importance of trade policy as a key companion to fiscal and monetary policies in facilitating world economic growth and development. The Committee voiced support for the WTO for its role in promoting openness and facilitating the rule of law in trade matters, for the Dispute Settlement Understanding and for the contributions to economic development.

8.2. The Committee encouraged all WTO Members to contribute to bringing the Doha Round to a conclusion with development as its centerpiece 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. The Committee acknowledged the specific request of the C4 for an immediate end to direct subsidies that distort production and trade in cotton.

9. The ICAC received a report from the Standing Committee on a proposal to create an international center for cotton research. The Standing Committee had considered the different forms and activities that such a center might undertake. The Standing Committee reported that no consensus had been achieved since some countries had expressed support for a center, while other countries indicated that it was not clear that there was a need for an international center. Some countries also expressed their concerns that the creation of an international center, even a virtual center, would result in an increase in government assessments. The Committee referred the matter back to the Standing Committee with instructions to undertake further analysis of options, including funding, with a view to building consensus amongst member countries on the proposal to set up an international center for cotton research.

10. In separate sessions Committee members heard of the considerable work being undertaken to promote the consumption of cotton. The IFCP emphasized the need to increase awareness of cotton attributes and promote cotton generically and positively to achieve a unified approach to compete with synthetic fibers.

11.1. The Committee on Cotton Production Research of the ICAC organized a technical seminar on “Technological Innovations for Sustainable Development of the Cotton Value Chain.” Increasing input costs, inefficient use of fertilizer, poor water management, unscientific use of insecticides and absentee ownership of farms are the most common factors limiting cotton productivity. Research leading to improved production practices, organization of farmers, and improvements in input availability have proven to be beneficial in many countries.

11.2. The Round Table for Biotechnology in Cotton met for the first time in Buenos Aires, Argentina on September 4, 2011. Members of the Round Table agreed that all countries that have adopted biotech cotton have benefitted through improved environmental safety, higher yields or lower production costs. Many members of the Round Table are concerned about the high cost of the technology and about trade limitations.

11.3. The ICAC, in cooperation with the National Organizing Committee in India, is organizing the World Cotton Research Conference-5 in Mumbai during November 7-11, 2011. Over 600 researchers from around the world will attend the Conference. The Plenary Meeting encouraged its member governments to send researchers to the Conference.

11.4. The Committee on Cotton Production Research of the ICAC decided to hold the 2012 Technical Seminar on the topic “Intellectual Property Rights and the Role of Private Breeders.”

Appreciation of Argentine Hospitality: The Committee thanked the people and the Government of Argentina for their hospitality in serving as host of the 70th Plenary Meeting. Members of the ICAC noted that Argentina was an ardent supporter of efforts to strengthen the global cotton value chain, and the efforts of Argentina on behalf of the ICAC are highly gratifying.

Future Plenary Meetings: The Committee accepted an invitation from the Government of Switzerland to host the 71st Plenary Meeting during October 8-11, 2012 in Interlaken. The Committee also accepted an invitation from Colombia to host the 72nd Plenary Meeting in 2013.

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, Nigeria, Pakistan, Peru, 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 8, 2011

Seasons begin on August 1

	2006/07	2007/08	2008/09	2009/10	2010/11 Est.	2011/12 Proj.
	Million Metric Tons					
BEGINNING STOCKS						
WORLD TOTAL	12.536	12.749	12.210	11.895	8.64	9.06
CHINA	3.991	3.653	3.321	3.585	2.78	2.17
USA	1.321	2.064	2.188	1.380	0.64	0.62
PRODUCTION						
WORLD TOTAL	26.766	26.073	23.455	22.165	24.86	26.91
CHINA	7.975	8.071	8.025	6.925	6.40	7.25
INDIA	4.760	5.219	4.930	5.185	5.53	6.04
USA	4.700	4.182	2.790	2.654	3.94	3.42
BRAZIL	1.524	1.602	1.214	1.194	1.95	1.83
PAKISTAN	2.121	1.900	1.926	2.070	1.91	2.27
UZBEKISTAN	1.171	1.206	1.000	0.850	0.91	0.92
OTHERS	4.514	3.894	3.569	3.287	4.23	5.19
CONSUMPTION						
WORLD TOTAL	26.487	26.532	23.696	25.261	24.37	24.72
CHINA	10.600	10.900	9.265	10.099	9.59	9.74
INDIA	3.944	4.053	3.872	4.328	4.36	4.49
PAKISTAN	2.633	2.649	2.519	2.393	2.20	2.24
EAST ASIA & AUSTRALIA	1.858	1.829	1.674	1.861	1.78	1.76
EUROPE & TURKEY	2.084	1.744	1.409	1.550	1.48	1.49
BRAZIL	0.987	0.993	1.000	1.024	1.01	1.03
USA	1.074	0.998	0.781	0.754	0.83	0.83
CIS	0.681	0.664	0.596	0.605	0.57	0.58
OTHERS	2.625	2.703	2.579	2.648	2.55	2.57
EXPORTS						
WORLD TOTAL	8.048	8.356	6.596	7.772	7.68	8.12
USA	2.821	2.968	2.887	2.621	3.14	2.51
INDIA	0.960	1.530	0.515	1.420	1.10	1.31
UZBEKISTAN	0.980	0.900	0.630	0.820	0.60	0.60
AUSTRALIA	0.465	0.265	0.261	0.460	0.55	0.90
CFA ZONE	0.928	0.603	0.469	0.561	0.48	0.51
BRAZIL	0.283	0.486	0.596	0.433	0.44	0.70
IMPORTS						
WORLD TOTAL	8.122	8.380	6.506	7.756	7.61	8.12
CHINA	2.306	2.511	1.523	2.374	2.61	3.52
EAST ASIA & AUSTRALIA	1.899	1.860	1.665	1.894	1.77	1.80
EUROPE & TURKEY	1.340	1.081	0.861	1.176	0.98	0.88
PAKISTAN	0.502	0.851	0.417	0.342	0.31	0.23
CIS	0.319	0.267	0.231	0.210	0.14	0.15
TRADE IMBALANCE 1/	0.075	0.025	-0.090	-0.017	-0.07	0.00
STOCKS ADJUSTMENT 2/	-0.140	-0.105	0.017	-0.144	-0.01	0.00
ENDING STOCKS						
WORLD TOTAL	12.749	12.210	11.895	8.638	9.06	11.24
CHINA	3.653	3.321	3.585	2.780	2.17	3.19
USA	2.064	2.188	1.380	0.642	0.62	0.70
ENDING STOCKS/MILL USE (%)						
WORLD-LESS-CHINA 3/	57	57	58	39	47	54
CHINA 4/	34	30	39	28	23	33
COTLOOK A INDEX 5/	59.15	72.90	61.20	77.54	164.26	

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.

Заявление 70-го пленарного заседания

«Роль государственного и частного секторов в цепи хлопковых ценностей: обеспечение как эффективности, так и справедливости»

В период 4 - 9 сентября 2011 г. в г.Буэнос-Айресе, Аргентина, состоялось 70-е пленарное заседание учреждённого в 1939 г. Международного консультативного комитета по хлопку. В заседании приняли участие около 495 человек, в том числе представители 39 правительств и 7 международных организаций. Комитет приветствовал своего самого нового члена – правительство Перу.

1. По оценкам Секретариата, мировое хлопкопроизводство в 2011-12 г. может возрасти благодаря чрезвычайному (более чем вдвое) взлёту цен на хлопок по сравнению с предыдущим сезоном. Секретариат сообщил, что промышленное использование хлопка восстанавливается после крутого спада во время глобальной рецессии, а мировая торговля хлопком увеличивается одновременно с ростом потребления. Секретариат предупредил, что в 2011-12 г. ожидается расширение запасов, что приведёт к снижению цен на хлопок.

2. Комитет отметил, что непостоянство цен в 2010-11 г. было рекордно высоким, причём оно влияет на стоимость по всем сегментам цепи хлопковых ценностей. Страны согласились с тем, что более интенсивные общенациональные меры сбора и публикации статистических данных о производстве, потреблении и запасах хлопка повысят прозрачность и предоставят дополнительную информацию для принятий решений. Комитет поручил Секретариату продолжить такой анализ и докладывать правительствам о чрезмерных спекуляциях, дефолтах по контрактам, связанных с торговлей хлопком, и других причинах непостоянства цен на хлопок, включая принятие правительствами мер, искажающих торговлю хлопком. Комитет рекомендовал использовать метрическую систему мер для стандартизации статистических данных по хлопку.

3. Комитет заслушал мнение экспертов относительно развития и передачи технологии. Было достигнуто соглашение о том, что технология играет ключевую роль в деле повышения производительности. Была отмечена роль частного сектора в развитии коммерчески жизнеспособных технологий. Комитет пришёл к согласию о том, что государственный сектор играет важнейшую роль в обеспечении регулирования, ускорении темпов технологического развития и расширении технологических новшеств, особенно для мелких и средних производителей. Особую важность представляет сотрудничество между исследователями частного и государственного секторов в эффективной системе проведения научных исследований.

4. Комитет согласился с тем, что фермерские ассоциации, организации и кооперативы могут расширить доступ к сельхозтехнике, улучшить деятельность в сфере маркетинга и усилить работу фермеров. Среди ключевых компонентов успеха работы фермерских организаций нужно отметить сильное и стабильное лидерство, прозрачность и демократичность руководства, а также добровольческую деятельность при владении и контроле со стороны фермеров.

5.1. Комитет заслушал информацию о системах производства органического хлопка. Был представлен доклад об ущербах, вызванных провалившимися программами использования

органического хлопка, в которых промоутеры не обеспечили адекватной технической поддержки и оставили в беде мелких хлопкопроизводителей во время падения мировых рыночных цен. Тем не менее были также приведены примеры успешных проектов органического хлопка.

5.2. Специалисты сообщили, что органические производственные системы обычно приводят к снижению урожайности. Отсюда можно рассматривать мелкомасштабные системы органического производства, если снижается стоимость сельхозтехники и химикатов, фермеры получают компенсационные ценовые добавки, а чистый возврат хлопкопроизводителям на гектар площади превышает или эквивалентен другим производственным системам. Была достигнута договорённость о том, что все программы и проекты, предназначенные для улучшения производства органического хлопка, должны составляться совместно с регулируемыми органами, реализовываться в прозрачном режиме и обеспечивать адекватную техническую поддержку хлопкопроизводителям.

6.1. Комитет заслушал доклад Консультативной группы частного сектора (КГЧС), которая призвала правительственных чиновников улучшить сбор и публикацию статистических данных о хлопке. КГЧС является рьяным противником запретов или ограничений в области торговли хлопком, особенно тех запретов и ограничений, которые были введены задним числом. КГЧС раскритиковала представителей индустрии и торговых ассоциаций, которые стараются придать обратное направление торговле хлопком путём направления просьб правительствам обеспечить защиту торговли. КГЧС согласилась с тем, что рекомендации «Современных хлопковых инициатив» (СХИ) по улучшению производственных методов подлежат использованию лишь в случае, если СХИ не способствуют разделению хлопкового рынка.

6.2. КГЧС рассмотрела риски увеличения количества дефолтов по контрактам из-за негативного влияния непостоянства цен. КГЧС призывает правительства и ассоциации частного сектора принять более эффективные меры по исполнению арбитражных решений путём уменьшения любых правовых препятствий и упрощения процедур, а также использования адекватных мер для недопущения случаев, когда объявившие дефолт лица стараются продолжать свою деловую активность. КГЧС призвала правительства снизить юридические препятствия и упростить процедуры исполнения арбитражных решений.

6.3. КГЧС призвала правительства принять разработанный ФАО показательный фитосанитарный сертификат, используемый в торговле хлопком, а также отметила, что гармонизация электронных коносаментов приведёт к упрощению документации, требуемой в торговле хлопком.

7. Комитет также заслушал доклад Экспертной группы по социальным, экологическим и экономическим характеристикам хлопкопроизводства (СЭЭХ), которая сообщила о своей работе по обновлению доклада об использовании пестицидов в хлопке и публикации нового доклада о компонентах стоимости рабочей силы в хлопковом секторе всего мира. СЭЭХ поблагодарила правительства-члены за предоставление данных, необходимых для её деятельности.

8.1. Комитет выслушал мнение члена Секретариата ВТО о том, что Дохийский раунд переговоров вроде бы зашёл в тупик. Тем не менее Комитет ещё раз подтвердил, что Дохийскому раунду переговоров нельзя позволить умереть, так как его вопросы остаются важными и должны быть разрешены. Комитет подчеркнул значимость торговой политики как ключевого участника разработки финансово-денежных тенденций для ускорения мирового экономического роста и развития. Комитет выразил поддержку ВТО и отметил её роль в

обеспечении открытости и соблюдении правовых правил при проведении торговых операций, за понимание условий урегулирования споров и за её вклад в процесс экономического развития.

8.2. Комитет попросил всех членов ВТО стремиться к завершению Дохийского раунда, с особым упором на вопрос развития, путём проведения переговоров, обеспечения гибкости и компромиса. Члены МККХ подтвердили положение о том, что хлопок является неотъемлемой частью повестки дня по развитию в Дохе (ПДРД) и что не может быть завершения ПДРД без принятия решений о хлопке. Члены ВТО согласились с тем, что вопрос о хлопке будет рассматриваться амбициозным, быстрым и конкретным образом в рамках общих переговоров по сельскому хозяйству. Комитет принял к сведению конкретный запрос четвёрки западноафриканских стран, призывающий к немедленному прекращению прямых субсидий, искажающих производство и торговлю хлопком.

9. МККХ заслушал доклад Постоянного Комитета относительно предложения по созданию международного центра научных исследований в области хлопка. Постоянный Комитет рассмотрел различные формы деятельности этого центра. Постоянный Комитет сообщил, что консенсус по этому вопросу не был достигнут, так как некоторые страны выразили поддержку идее создания такого центра, а другие заявили, что необходимость создания подобного международного центра не была ярковыраженной. Некоторые страны также высказали свою озабоченность о том, что создание международного центра, даже в виртуальном формате, приведёт к повышению уровня правительственных взносов. Комитет вернул этот вопрос Постоянному Комитету для повторного рассмотрения и проинструктировал его провести дальнейший анализ вариантов, включая финансирование, с учётом достижения консенсуса среди стран-членов относительно предложения о создании международного центра по научным исследованиям в области хлопка.

10. При проведении отдельных сессий члены Комитета заслушали сообщение о проделываемой значительной работе по рекламированию хлопкопотребления. Члены Международного форума рекламы хлопка подчеркнули необходимость расширения информативной базы относительно хлопковых характеристик, общего и положительного рекламирования хлопка для выработки единого подхода к проблеме конкуренции с синтетическими волокнами.

11.1. Комитет МККХ по научным исследованиям в области хлопкопроизводства провёл технический семинар по теме «Технологические нововведения для устойчивого развития цепи хлопковых ценностей». Наиболее общими факторами, ограничивающими производительность хлопка являются повышение стоимости сельхозтехники, неэффективное внесение удобрений, плохое водопользование, ненаучное использование инсектицидов и отсутствие владельцев ферм. Многим странам пошли на пользу научные исследования современных методов производства, организация фермеров и достаточное наличие сельхозтехники и химикатов.

11.2. 4 сентября 2011 г. в г.Бунос-Айресе, Аргентина, прошло первое заседание круглого стола по биотехнологии в хлопке. Члены круглого стола согласились с тем, что все страны, принявшие биотех-хлопок, получили выгоды благодаря повышению экологической безопасности, росту урожайности или снижению производственных затрат. Многие члены круглого стола озабочены высокой стоимостью технологий и торговыми ограничениями.

11.3. МККХ совместно с Национальным оргкомитетом Индии проведёт в период 7-11 ноября 2011 г. Всемирную конференцию по исследованию в области хлопка-5, в которой примут

участие свыше 600 исследователей со всех уголков мира. Участники пленарного заседания попросили правительства-члены МККХ прислать своих исследователей на эту конференцию.

11.4. Комитет МККХ по научным исследованиям в области хлопкопроизводства решил провести технический семинар 2012 г. на тему «Права интеллектуальной собственности и роль частных селекционеров».

Благодарность за гостеприимство Аргентины. Комитет поблагодарил народ и правительство Аргентины за гостеприимство при проведении 70-го пленарного заседания. Члены МККХ отметили, что Аргентина была ярким приверженцем мероприятий по усилению мировой цепи хлопковых ценностей, причём деятельность Аргентины от имени МККХ заслуживает высокой похвалы.

Будущие пленарные заседания. Было принято приглашение правительства Швейцарии об организации 71-го пленарного заседания в г.Интерлакене в период 8-11 октября 2012 г. Комитет также принял приглашение Колумбии провести 72-е пленарное заседание в 2013 г.

Страны-члены Комитета

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

11 - 4 و قررت اللجنة الخاصة بأبحاث إنتاج القطن التابع للجنة الاستشارية الدولية للقطن (ICAC) أن تعقد ندوتها الفنية لسنة 2012 حول موضوع "حقوق الملكية الفكرية و دور مربّي التقاوي من القطاع الخاص".

تقدير للضيافة الأرجنتينية : تقدمت اللجنة الاستشارية الدولية للقطن (ICAC) بشكرها الى شعب وحكومة الأرجنتين لحسن الضيافة التي أبدوها لدى استضافتهم الاجتماع العمومي السبعين. وذكر أعضاء اللجنة ان الأرجنتين كانت من الداعمين المتحمسين للجهود الرامية الى تقوية سلسلة قيمة القطن العالمية كذلك فان جهود الأرجنتين نيابة عن اللجنة الاستشارية الدولية للقطن (ICAC) انما هي أمور تثلج الصدور.

الاجتماعات العمومية في المستقبل: قبلت اللجنة الاستشارية الدولية للقطن الدعوة التي وجهتها حكومة سويسرا لاستضافة الاجتماع العمومي الحادي والسبعين في العام 2012 في مدينة انتيرلاكين في الفترة من 8 - 11 أكتوبر 2012. كذلك قبلت اللجنة دعوة من كولومبيا لاستضافة الجلسة العمومية الثانية و السبعين التي ستعقد في العام 2013.

الدول الاعضاء:

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

اللجنة الدائمة بتوجيهات لها بإجراء تحليلات إضافية لخيارات أخرى تشمل التمويل لغرض إحقاق الإجماع بين الدول الأعضاء حول الاقتراح لتأسيس مركز دولي لأبحاث القطن.

10 - و في جلسات منفصلة سمع أعضاء اللجنة عن الكم الهائل من العمل الذي يُجرى لتشجيع استهلاك القطن. و في هذا المجال أكد المنتدى الدولي للترويج للقطن (IFCP) عن الحاجة لزيادة الدراية بمزايا القطن و تشجيعه من النواحي العامة و الإيجابية بغية تحقيق طريقة موحدة للتنافس مع الألياف المصنعة.

11 - 1 نظمت اللجنة الخاصة بأبحاث إنتاج القطن التابعة للجنة الاستشارية الدولية للقطن (ICAC) ندوة فنية حول الابتكارات التكنولوجية للتنمية المستدامة في سلسلة القيمة للقطن. وكانت من بين أكثر العوامل شيوعاً للحد من إنتاجية القطن عوامل التكلفة المتزايدة للمدخلات، والاستخدام غير الكافي للأسمدة و الإدارة الضعيفة للمياه و الاستخدام غير العلمي لمبيدات الحشرات و ملكية الغائبين للمزارع. هذا مع العلم بأن الأبحاث التي تؤدي إلى ممارسات أفضل للإنتاج و تنظيم المزارعين وتحسين وفرة المدخلات أثبتت أنها ذات فائدة في كثير من البلدان.

11 - 2 عقد اجتماع الطاولة المستديرة الخاص بموضوع التكنولوجيا الحيوية في القطن لأول مرة في بوينوس آيرس بالأرجنتين في الرابع من شهر سبتمبر 2011. و اتفق الأعضاء المجتمعون بأن كل الدول التي تبنت قطن البيوتيك استفادت من خلال تحسين سلامة البيئة و ارتفاع الغلة أو انخفاض تكلفة الإنتاج. و أعرب العديد من الأعضاء حول الطاولة المستديرة عن قلقهم من ارتفاع أسعار التكنولوجيا و من الحدود على التجارة.

11 - 3 تقوم اللجنة الاستشارية الدولية للقطن (ICAC) بالتعاون مع لجنة التنظيم الوطنية في الهند بتنظيم المؤتمر الخامس حول أبحاث القطن العالمي الذي سيعقد في مومباي في الفترة بين 7 - 11 / 2011 من شهر نوفمبر. و سوف يحضر هذا المؤتمر أكثر من ستمائة باحث من مختلف أنحاء العالم كذلك شجعت الجلسة العمومية الحكومات الأعضاء على إرسال باحثين منها لحضور المؤتمر.

8 - 1 استمعت اللجنة الاستشارية الدولية للقطن من عضو من سكرتارية منظمة التجارة العالمية (WTO) الذي قال أن دورة الدوحة يبدو أنها وصلت إلى طريق مسدود. إلا أن اللجنة الاستشارية تؤكد أنه يجب أن لا يُسمح لدورة الدوحة أن تموت لأن القضايا القائمة فيها تظل على أهميتها ويجب أن يتم حلها. و أكدت اللجنة الاستشارية على أهمية السياسات التجارية كونها مرافقا رئيسيا للسياسات المالية والنقدية يصب في اتجاه تسهيل التنمية و التطوير الاقتصادي العالمي. هذا وأعربت اللجنة الاستشارية عن دعمها لمنظمة التجارة الدولية للدور الذي تلعبه في مجال تشجيع الانفتاح و تسهيل حكم القانون في الأمور التجارية من أجل تفهم لحل النزاعات والإسهام في التنمية الاقتصادية.

8 - 2 شجعت اللجنة الاستشارية الدولية للقطن (ICAC) كل الأعضاء في منظمة التجارة العالمية على المساهمة في توصيل دورة الدوحة إلى خاتمة يكون فيها موضوع التنمية في مركز الصدارة من خلال المفاوضات و المرونة و الحلول التوفيقية. كذلك كرر أعضاء اللجنة الاستشارية الدولية للقطن قولهم بأن القطن هو جزء لا يتجزأ من جدول عمل الدوحة الخاص بالتنمية . و أنه لا يمكن لهذه الأجندة أن تكتمل بدون إيجاد حل لموضوع القطن. أما أعضاء منظمة التجارة الدولية فقد وافقوا على أنه سيتم التعامل مع موضوع القطن بصورة طموحة وسريعة وأن تكون قصرا ضمن المفاوضات الشاملة الخاصة بالزراعة. و أقرت اللجنة بطلب خاص من دول (C 4) (وهي أربع دول منتجة للقطن في غرب إفريقيا ضمن منظمة التجارة الدولية) يدعو إلى الإنهاء الفوري للدعم المباشر الذي يشوه إنتاج القطن و الاتجار به.

9 - تلقت اللجنة الاستشارية الدولية للقطن تقريراً من اللجنة الدائمة حول الاقتراح الخاص بتأسيس مركز دولي لأبحاث القطن. و كانت اللجنة الدائمة قد نظرت في الأشكال و النشاطات المختلفة التي يمكن لمثل ذلك المركز أن يتولاها. و ذكرت اللجنة الدائمة في تقريرها أن الإجماع لم يتحقق حول هذا الموضوع ذلك أن بعض البلدان أعربت عن دعمها لتأسيس مثل ذلك المركز بينما أشارت بعض البلدان الأخرى إلى أنه من غير الواضح بأن هناك حاجة لمركز دولي. كذلك أعربت بعض الدول عن قلقها من أن إنشاء مركز دولي حتى لو كان مركزاً افتراضياً سوف ينتج عنه زيادة في المستحقات من الحكومات. و أعادت اللجنة الاستشارية الدولية للقطن الأمر إلى

التقارير الإحصائية الخاصة بها. وعارضت هيئة القطاع الخاص الاستشارية (PSAP) بشدة فرض حظر أو وضع حدود على التجارة بالقطن خاصة تلك التي تُطبق بصورة ذات أثر رجعي. كذلك انتقدت هيئة القطاع الخاص الاستشارية اللاعبين في الصناعة و رابطات التجار التي تسعى إلى إرجاع تجارة القطن إلى الوراء من خلال طلب حماية تجارية من الحكومات. واتفقت هيئة القطاع الخاص الاستشارية (PSAP) على أن التوصيات الواردة من مبادرة القطن الأفضل (BCI) الداعية إلى ممارسات إنتاج محسنة هي أمور حسنة شريطة أن لا تشجع تلك المبادرة على شردمة سوق القطن.

6 - 2 نظرت هيئة القطاع الخاص الاستشارية (PSAP) في زيادة المخاطر من التخلف عن الوفاء ببنود العقود المبرمة نتيجة الأثر السلبي من التقلبات في الأسعار. و تحثّ الهيئة الحكومات والرابطات في القطاع الخاص على اتخاذ إجراءات أكثر كفاءة لاحترام قرارات التحكيم من خلال تخفيف أي عقبات قانونية و تسهيل الإجراءات إضافة إلى اتخاذ الخطوات المناسبة للحيلولة دون حدوث أي تخلف عن توفير أي مجالات أعمال. كذلك تحثّ الهيئة الحكومات على تخفيض العقوبات القانونية و تسهيل الإجراءات لتنفيذ بنود قرارات التحكيم.

6 - 3 شجعت هيئة القطاع الخاص الاستشارية (PSAP) الحكومات على تبني نموذج شهادات صحة النبات المعمول به في منظمة الزراعة و الأغذية في عمليات الاتجار بالقطن، و ذكرت الهيئة أيضا أن انسجام بوليصات الشحن الالكترونية من شأنها تسهيل صياغة الوثائق المطلوبة في تجارة القطن.

7 - كذلك تلقت اللجنة الاستشارية الدولية للقطن (ICAC) تقريراً من هيئة الأداء الاجتماعي والبيئي و الاقتصادي للقطن (SEEP) ذكرت فيه أنها تعمل على تحديث تقريرها حول استخدام مبيدات الحشرات في القطن، كما أنها سترفع تقريراً جديداً حول مكونات تكلفة العمالة في مجال القطن في العالم. هذا وقدمت هيئة (SEEP) الشكر إلى الحكومات الأعضاء لتوفيرها المعلومات الضرورية لعمل الهيئة.

3 - استمعت اللجنة الاستشارية الدولية للقطن (ICAC) إلى خبراء في مجال تطوير التكنولوجيا و تحويلها. و كان هناك اتفاق على أن التكنولوجيا تلعب دورا مركزيا في تقوية الإنتاجية. و تمت الإشادة بدور القطاع الخاص في تطوير تكنولوجيات قابلة للتطبيق تجاريا. كذلك وافقت اللجنة على أن هناك دور حاسم يلعبه القطاع الخاص في تنظيم و تسهيل تطوير التكنولوجيا و تقديم الإرشاد بشأنها خاصة إلى المنتجين الصغار و متوسطي الحجم. كما أن التعاون بين الباحثين من القطاعين العام و الخاص ضمن نظام أبحاث كفؤ إنما هو أمر جوهري.

4 - توافق اللجنة الاستشارية على أن روابط ومنظمات وتعاونيات المزارعين يمكنها زيادة الحصول على المدخلات، و تحسين جهود التسويق و تقوية صوت المزارعين. و أن الشيء الرئيسي لنجاح منظمات المزارعين يشمل قيادات قوية مستقرة، و حوكمة شفافة تعمل بديمقراطية طوعية مقرونة بملكية و سيطرة المزارعين.

5 - 1 تلقت اللجنة الاستشارية معلومات عن أنظمة إنتاج القطن العضوي، من خلال تقرير عن الأضرار التي تسببها البرامج الفاشلة لزراعة القطن العضوي حيث أن المروجين لهذه البرامج لم يقدموا الدعم التقني المناسب و تخلوا عن المزارعين الصغار عندما هبطت الأسعار في السوق. و لكن تمت الإشارة إلى أمثلة أخرى عن مشاريع عضوية ناجحة.

5 - 2 و ذكر الأخصائيون أن أنظمة الإنتاج العضوي ينتج عنها عادة غلات أدنى. لذلك بالنسبة لنظم الإنتاج العضوي فإنه من الممكن اعتبارها في قطاع المصالح الصغيرة إذا خُفّضت تكلفة المدخلات و أن تم استلام علاوات تعويضية للأسعار، و كان صافي العائد إلى المزارعين من الهكتار الواحد أكثر من أو مساوي لأنظمة الإنتاج الأخرى. و لقد كان هناك اتفاق على أن كل البرامج و المشاريع المصممة لتقوية إنتاج القطن العضوي يجب أن تتسق مع السلطات التنظيمية وتعمل بشفافية وتوفر دعما تقنيا مناسباً للمزارعين.

6 - 1 تلقت اللجنة الاستشارية الدولية للقطن تقريراً من هيئة القطاع الخاص الاستشارية (PSAP) و التي دعت فيه مسؤولي الحكومات إلى تحسين جمع المعلومات عن القطن و رفع

اللجنة الاستشارية الدولية للقطن

البيان الختامي للجلسة العمومية السبعين

"أدوار القطاعين العام والخاص في سلسلة القيمة للقطن:

ضمان الكفاءة والإنصاف "

اجتمعت اللجنة الاستشارية الدولية للقطن (ICAC) في مدينة بوينوس آيريس في الأرجنتين في الفترة بين الرابع والتاسع من شهر سبتمبر، أيلول سنة 2011 في جلستها العمومية السبعين منذ إنشاء اللجنة قبل اثنين وسبعين سنة. وحضر الجلسة 495 شخص من بينهم ممثلون عن 39 حكومة و7 منظمات دولية. ورحبت اللجنة بحكومة البيرو التي أصبحت أحدث عضو فيها.

1 - ذكرت الأمانة العامة انه من المتوقع ان يرتفع انتاج القطن في العالم في موسم 2011 - 2012 مدفوعا بالارتفاع الاستثنائي في أسعار القطن إلى أكثر من ضعف ما كانت عليه خلال الموسم 2010 - 2011. كما أن استعمال المحالج آخذ في التعافي من الهبوط الحاد الذي عانى منه اثناء الركود العالمي في الوقت الذي ترتفع فيه تجارة القطن العالمية مع ازدياد الاستهلاك. غير أن الأمانة العامة حذرت بان المقدّر أن ترتفع كميات المخزون من القطن في العام 2011 / 2012 الامر الذي يؤشر الى انخفاض في اسعاره.

2 - ذكرت اللجنة أن تقلبات الأسعار وصلت إلى ارتفاع قياسي في سنة 2010-2011 وأن هذا التقلب يفرض تكاليف على كل القطاعات في سلسلة القيمة للقطن. و اتفقت البلدان على أن جهودا أقوى يجب أن تبذل على الصعيد الوطني من أجل جمع المعلومات ورفع تقارير بالإحصائيات عن إنتاج القطن، و استهلاكه و المخزون منه لأن ذلك من شأنه أن يقوّي الشفافية و يوفر معلومات إضافية لاتخاذ القرارات. وقامت اللجنة بتوجيه أمانتها العامة للاستمرار في عمليات التحليل و رفع التقارير للحكومات عن المضاربة المفرطة و عن التخلف عن الوفاء بال عقود المبرمة للتجارة بالقطن و غيرها من الأسباب التي تؤدي إلى التقلب في أسعار القطن بما في ذلك تبني الحكومات لإجراءات من شأنها تشويه التجارة وأوصت اللجنة باستخدام المقياس المتري كوحدة قياسية للإحصائيات الخاصة بالقطن.

Inauguration

9:00 hr. Monday, September 5, 2011

Mr. Patrick Packnett, Chair of the Standing Committee and delegate of the USA, expressed his appreciation to the government of Argentina and the members of the organizing committee for hosting the 70th Plenary Meeting. He noted that Argentina has a long history of cotton production dating back to the 16th Century contributing to a vibrant farm economy. He said that Argentina has been a member of ICAC since 1946, hosted the 45th Plenary Meeting in 1986, and has been a consistent and steadfast supporter of the ICAC and an advocate for the cotton industry and in particular a strong voice for developing countries. Mr. Packnett commended the Government of Argentina and the organizing committee on the selection of the theme for this year's meeting: Public and Private Sector Roles in the Cotton Value Chain. He noted that further development and expansion of the cotton industry hinges on strong public/private cooperation. He expressed his hope that this plenary meeting provides information to assist the various stakeholders in their institutional roles and provides a platform to enhance cooperation in meeting the challenges and seizing the opportunities that lie ahead. Mr. Packnett's discourse is a statement of the meeting.

Mr. Roberto Billard of INTA (Instituto Nacional de Tecnología Agropecuaria) welcomed participants to Argentina and said that it is an honor for Argentina to host the plenary meeting in Buenos Aires. He noted that it is important to provide support to producers who are to supply cotton to textile mills and for exports. He invited delegates to take advantage of the technical tour in Chaco where they will have an opportunity to get acquainted with Argentine cotton production technology, also showcased in a publication called "From seed to skin". He introduced the Argentine delegation and invited Lic. Debora Giorgi, Minister of Industry to give her welcoming remarks.

Minister of Industry, Lic. Débora Giorgi, thanked the Organizing Committee for its work and said that the theme of the meeting, "Public and Private Sector Roles in the Cotton Value Chain: Ensuring both Efficiency and Fairness" is very appropriate. She noted that after the financial crisis of 2008 the world has changed and developing countries, including Latin America, have become the engine of economic growth with triple rates of growth compared with developed countries. Growing young populations in these countries drive growth in demand for industrial goods, including textiles, and provide an opportunity to increase mill use of cotton in Argentina. She pointed to significant growth experienced in Argentina since 2003 in cotton production, mill use, exports and per capita

consumption of cotton. She said that the government supports expansion of industrial use of cotton in Argentina, driven by growing domestic demand for textiles, by providing \$150 million of soft term financing to about 35 enterprises in the cotton value chain. She indicated that production and exports of value-added finished products is growing in Argentina, providing opportunities for cotton. She wished participant a successful meeting.

Mr. Julian Dominguez, Minister of Agriculture, livestock and Fisheries, was invited to present his welcoming remarks. Minister Dominguez on behalf of the President of the Republic of Argentina welcomed the ICAC to Argentina again. He said that an agro-industrial model of development to 2020 was developed in Argentina aimed at industrialization of rural areas and increasing exports of value-added goods. He noted that according to FAO the urban population will exceed the rural population in the world this year. Growth in population and demand for quality food will require more production. Argentina is committed to increasing agricultural production in the future and improving food security. He pointed out that the public sector has a very important role in providing producers with financial mechanisms and with aid in technology transfer. Small producers should be provided with training and cooperatives should be supported in order to increase yields and reduce the cost of production. In order to increase production, resources such as land and water should be protected and used efficiently. He mentioned that Argentina has agreements with 13 African countries on technological cooperation and development of biotechnology. He wished participants a productive technical tour in Chaco.

Mr. Celso Muchut, Secretary of the Association for the Promotion of Cotton Production (APPA) presented his welcoming remarks. He said that it is an honor to host the meeting in Argentina. He said that because of the high cost of harvesting cotton in Argentina, cotton production shrank at the beginning of this century. The development of a small stripper machine changed the situation allowing for a reduction in harvesting cost and an increase in yields. The ultimate goal is to achieve yields of 1,000 kg of lint per hectare. He said that small producers should be supported, especially in acquiring new production technologies and biotechnology. Mr. Muchut said that the ICAC plenary meeting will bring confidence to cotton producers. He wished participants a happy stay in Argentina. Mr. Muchut's discourse is a statement of the meeting.

Mr. Juan Carlos Núñez, President of the Association of Cotton Ginners in Argentina, welcomed the ICAC to Argentina and pointed to the im-

portance of close collaboration between public and private sectors as the theme of the meeting suggests. He noted that the state has to have a clear and transparent policy to address social aspects of development for small and medium sized cotton farmers. Players in the private sector should exhibit solidarity in the value chain from producers and ginners to cotton spinners in order to achieve better economic results, while ethical practices are essential for development. Mr. Núñez's discourse is a statement of the meeting.

The delegate of SOUTH AFRICA, host of the 68th Plenary Meeting, presented welcoming remarks on behalf of all delegates. She welcomed all delegates to the 70th plenary meeting of the ICAC and thanked the government and people of Argentina for hosting the meeting in Buenos Aires. She also thanked the Secretariat for doing a "sterling job." She noted that South Africa had hosted the 68th plenary meeting in 2009 for the benefit of its cotton industry. She said that hosting the meeting helped South Africa to realize its cotton strategy goals by utilizing opportunities presented by the conference to network, share experiences and benchmark production practices. She noted that South Africa, like most countries, is concerned with the risks posed by price volatility to producers, ginners, traders and textile mills. She expressed the hope that the ICAC will continue monitoring these trends. She recognized the need to improve dialogue between producers and consumers in order to improve cotton market data and transparency. She also pointed to the need to urgently address a problem of unfair competition on international markets and to conclude discussions in the WTO in favor of small-scale farmers. The discourse of South Africa is a statement of the meeting.

The CHAIR introduced Mr. Patrick Packnett, Chair of the Standing Committee. Mr. Packnett reported that the Standing Committee had handled an important and demanding agenda since the last Plenary Meeting held in Lubbock, Texas, USA in September 2010 and in the seven meetings, one special seminar and one workshop that it has convened during the year since. He said that the Standing Committee had examined issues ranging from extreme price volatility, consideration of an international cotton research center, production programs including organic, Fair Trade, Cotton Made in Africa, and the BCI, efforts to harmonize phytosanitary certificates for trade in cotton, cotton and multilateral trade negotiations, government measures that distort cotton production, responsible sourcing of cotton, endorsement of the contract for the Executive Director and a difficult negotiation to approve the ICAC budget.

He reported that following concerns noted about

price volatility at the 69th Plenary Meeting and the need for enhanced dialog, the Standing Committee focused its attention on this area. He noted that the Secretariat had prepared a report on volatility in prices of cotton and other commodities. The Secretariat's analysis found that in the long run the volatility of cotton prices is similar to that of other raw agricultural products, metals, and food, while it is lower than that of beverages and energy. The Secretariat noted that tight stocks relative to rising demand, combined with concerns over defaults on contracts, fears of restrictions on cotton exports, and expectations of increased imports by China were probably the primary factors explaining the rise in volatility in prices during 2010/11. He reported that the Standing Committee had conducted a seminar on "Cotton Price Volatility: Transparency of Cotton Supply and Use and Trade Policies," on February 8, 2011. Conclusions from the seminar were that governments could facilitate better decision making in the cotton value chain by improving efforts to collect and publish timely, relevant, accurate statistics on cotton supply and demand, and particularly data on physical stocks, and there was general agreement that market participants should make greater use of market-based risk management tools where appropriate.

Mr. Packnett said that the Standing Committee in its 509th Meeting on February 3, 2011, unanimously agreed to accept Switzerland's invitation to host the 71st Plenary Meeting in 2012. The Standing Committee is very thankful for Switzerland's unwavering support of the ICAC and its work mandate. He expressed on behalf of all members of the Standing Committee, sincere appreciation of the excellent secretarial support that the Executive Director, Mr. Terry Townsend and other members of his team provide to the Standing Committee. He thanked the Argentine Government and the Organizing Committee for the excellent arrangements made for the 70th Plenary Meeting. He wished all a very productive and memorable meeting.

The CHAIR thanked Mr. Packnett for his report. The Report of the Chair of the Standing Committee is a statement of the meeting.

The CHAIR invited Dr. Sukumar Saha, ICAC Researcher of the Year 2011 to come forward. The CHAIR introduced Dr. Sukumar Saha who has a total of thirty-five years of professional research experience. He is recognized as an international authority for the development of genetic and in cytogenetic resources that are being used by scientists around the world. Mr. Packnett noted that Dr. Saha's creativity, work ethic, and accomplishments exemplify the spirit of ICAC award. Dr. Saha was presented with a Plaque and was invited to say a few words.

Dr. Saha thanked the ICAC for the award, saying that it is a pleasure to receive it. He thanked his parents, his wife and his collaborators for their support in his work.

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

Mr. Townsend acknowledged the work of expert panels and task forces of the ICAC, including the International Committee on World Cotton Research (WCRC) created in 1994, the Private Sector Advisory Panel (PSAP) created in 1999, the Task Force on Commercial Standardization of Instrument Testing of Cotton (CSITC), created in 2003, the Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP) created in 2007, and now the Round Table on Biotechnology in Cotton created this year, which extend the work of ICAC beyond the subject matter competence of the Secretariat and enable ICAC to provide concrete and important services to the industry and Member Governments. He noted that the International Forum for Cotton Promotion (IFCP) facilitates national efforts to build demand for cotton by providing positive information about cotton to consumers.

Mr. Townsend reported that the ICAC serves as the International Commodity Body for Cotton and Cotton Textiles with the Common

Fund for Commodities (CFC). Since the Fund became operational in the early 1990s, a total of 22 cotton projects valued at over \$70 million have been supported. He said that the European Union, under its program for African, Caribbean and Pacific countries (ACP) is providing substantial support for the cotton sector. The EU support is channeled through the CFC to ensure coherence in delivery and efficiency in oversight. He observed that the World Trade Organization (WTO) Director-General's Consultative Framework Mechanism on Cotton records cotton-specific development assistance provided by ICAC members Brazil, France, Germany, and the United States, as well as assistance provided by other countries and several multilateral organizations.

Mr. Townsend said that the ICAC Secretariat is as productive as any in the world and that it is a pleasure to be working with each of them. He noted that the longest-serving member of the Secretariat, business manager Fred Arriola, will retire at the end of June 2012. Mr. Arriola has worked with the ICAC since 1978, and in over 30 years there has not been a single instance of financial impropriety, inconsistency of accounts or difficulties with audits. Took this opportunity to specifically thank Mr. Arriola for his years of service to the ICAC. He thanked member countries for the privilege of serving as executive director looking forward to a successful 70th Plenary Meeting.

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

The CHAIR said that the next order of business is to approve the Agenda of the 70th Plenary Meeting. The Provisional agenda was approved by the Standing Committee at its meeting on July 22 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 adjourned the Inaugural Session of the 70th Plenary Meeting at 11:30 hrs.

First Plenary Session

The Role of the Trade in Promoting Growth and Development (Discussion of the Doha Round)

9:00 hr. Tuesday, September 6, 2011
Ing. Agr. Lorenzo Basso in the Chair

The CHAIR welcomed the participants to the First Plenary Session and invited Mr. Andrei Guitchounts, Economist at the International Cotton Advisory Committee, to present the report of the ICAC Secretariat on Production and Trade Policies Affecting the Cotton Industry.

Mr. Guitchounts said that subsidies to the cotton industry, including direct support to production,

border protection, crop insurance subsidies, minimum support price mechanisms and export subsidies, are estimated at \$1.3 billion in 2010/11, down from \$3.2 billion in 2009/10. He noted that more countries have cotton production support programs, but because of high prices the programs did not result in actual spending in 2010/11. He said that the share of world cotton production receiving direct government assistance, including direct payments and border protection, declined from 84% of world produc-

tion in 2008/09 to an estimated 53% of production in 2010/11. Mr. Guitchounts observed that except for crop insurance, other subsidies under the U.S. cotton program were not available because of record market prices in 2010/11. He said that crop insurance subsidies in the United States declined from \$451 million in 2009/10 to an estimated \$319 million in 2010/11, and total U.S. support in 2009/10 decreased from 8 cents per pound of production in 2009/10 to an estimated 4 cent per pound during 2010/11. Mr.

Guitchounts also reported that because world cotton prices were record high in 2010/11, the border protection measures used by China had no measurable impact on domestic cotton prices. Mr. Guitchounts said that India has a Minimum Support Price program, but because market prices were high in 2010/11, this program did not result in payments to producers. He indicated that support programs in the European Union, Turkey and Colombia did not change significantly from 2009/10 and 2010/11, and that there were no PEPRO cotton auctions in Brazil during 2010/11. The report: *"Production and Trade Policies Affecting the Cotton Industry"* is part of the documents of the meeting.

The CHAIR thanked Mr. Guitchounts for his presentation and introduced Mr. Chiedu Osakwe, Director of the Accession Division at the World Trade Organization (WTO).

Mr. Osakwe first conveyed the appreciation of WTO Director-General Pascal Lamy for the leadership role of the government of Argentina in the WTO and the appreciation of the WTO Secretariat to the Chairman of the ICAC Standing Committee as well as the Executive director of the ICAC, for fostering cooperation between the ICAC and the WTO. He described the three principle messages he intended to deliver: 1) trade opening is a necessary and fundamental component in any long-term strategy for growth, development and modernization; 2) trade policy is an indispensable (but not sufficiently emphasized) companion to fiscal and monetary policies for recovery from economic crisis; and 3) the WTO is alive and well despite the current paralysis in the Doha Round. Mr. Osakwe noted that the Doha Round was facing challenges, as the large economies that had led WTO discussions in past years were now facing domestic economic crises, but that trade opening remains an important issue, which if handled well could help global economic recovery. He then explained how the multilateral trading system plays a key role in development, with several important contributions from the WTO. He noted in particular the importance of the Dispute Settlement Understanding used by many WTO members to solve some trade issues, and the only forum to which all members, powerful or not, can have recourse. He described the current state of the Doha Round as "deadlocked" and "paralyzed." The Doha Round has made some progress since it first started in 2001, but is currently going through a very challenging and sensitive situation. This situation is complicated by the fact that the balance of power amongst countries has changed significantly over the last decade, with some large economies now facing challenges while previously weaker ones have strengthened. The Doha Round cannot die because some of its issues remain important and have not yet been solved. However, to achieve a successful conclusion in the changing current global environment the Doha Round will need

a complete overhaul, with the reassessment of the issues it is hoped to solve, and the inclusion of new issues such as climate change, capital flows, etc. Mr. Osakwe emphasized that a clear distinction needs to be made between the Doha Round and its issues, and the WTO, which remains a platform of choice for trade opening and cannot and should not be eliminated. Mr. Osakwe then summarized how, under the Doha Mandate, the WTO in partnership with international institutions such as the ICAC and the International Trade Center (ITC) had coordinated significant development assistance to least developed countries. Mr. Osakwe concluded by thanking the ICAC for its cooperation in the last several years, and announced that due to a change in his responsibilities within the WTO, another division would now be in charge of cotton. He recommended that the ICAC statement underscore the importance of trade policy as a key companion to fiscal and monetary policies for policy-makers in crisis-recovery measures, to promote growth and development, and also continues supporting trade openness through WTO multilateral trade negotiations to underpin a healthy growing global economy. Mr. Osakwe's report is a statement of the meeting.

The CHAIR thanked Mr. Osakwe and introduced Mr. Eduardo Michel, Deputy, Directorate of Multilateral Economic Negotiations, Ministry of Foreign Affairs, Argentina.

Mr. Michel summarized the progress of the Doha Round in the agricultural track, and in particular for the cotton sector. He reminded delegates of the specific mandate for cotton. He noted that Argentina had always supported the Cotton Initiative, in particular in the agricultural G20, where it maintained a position against the domestic support measures distorting international trade that were adopted by the European Union and the United States. Argentina hopes that an agreement of some sort will be reached in the coming Ministerial Conference of the WTO on December 15-17, 2011. In particular, Argentina will support that a decision to allow cotton exports from developing countries to developed countries be free of duty, as well as to eliminate policies subsidizing cotton production. Mr. Michel explained that any result on cotton within the WTO would benefit Argentina, due to the negative impact of subsidies from developed countries on the poor producing provinces in the country. These provinces have suffered from low cotton prices as a result of subsidies to cotton in developed countries. He noted that while the issue of subsidies to cotton production was central to the Doha Round negotiations on cotton, countries that subsidize their production had managed to avoid discussing it until now. He warned that some developed countries could achieve the reduction in internal support to cotton production asked by the C4 by shifting their support to green box, but that this was going to result in similar distorting effects on world cot-

ton trade. He read an excerpt of the declaration by the Argentine delegation to the 37th Ministerial Conference of the FAO in June 2011, where the government of Argentina regrets the lack of progress in the Doha Round and reiterates its belief that a successful result of the Doha Round is essential to make global agricultural trade fair and to strengthen food security, and also repeats its intention to work towards such a successful conclusion. He noted that the decline in government support to the cotton sector in 2010/11 due to high cotton prices was only temporary and that mechanisms of support remained intact in the countries using them. He expressed his hope that the coming 8th Ministerial Conference of the WTO would allow real progress in the negotiations and once again reiterated Argentina's intention to continue working towards a successful conclusion of the Doha Round, which would respect its development mandate. Mr. Michel's report is a statement of the meeting.

The CHAIR thanked Mr. Michel for his statement. The CHAIR noted that the Doha Round negotiations were very relevant in the current international context of strong price volatility and food insecurity, and that coordinated action was needed to respond to these issues. He said that in order to increase food production, the use of many tools was necessary, including technological innovation, international cooperation, technology transfer, more transparent and predictable international markets, and world trade that is free of distortions. He noted that linking international trade and development issues was necessary to conclude the Doha Round with a more equitable international trade situation. He encouraged countries to continue working towards this objective. He said that unfortunately, since cotton was part of a bigger package, any progress in the cotton negotiations was constrained by the lack of progress in other sectors. He mentioned the initiative to attain early results in some fields (Least Developed Countries Package), which includes cotton. He urged WTO members not to lose sight of the main objective of the Doha Round, which is development.

The CHAIR asked delegates if they had any questions for the panel members.

The delegate from MALI thanked the Argentine government for its organization of the meeting and the executive director of the ICAC for his work. He noted that Mr. Karim Traore, President of the UNPCB (Union of Cotton Producers of Burkina Faso) had talked the previous day about the great importance of the cotton sector for the economies of West and Central African countries. In the last decade, falling cotton prices had negative repercussions on the economies of African countries. He said that these countries started to dream about a special and differential treatment when the Doha Round started in 2001, but that a decade later nothing had yet been concluded despite the Cotton Initiative launched

in 2003 by the C4. He said that these countries could not understand why a solution has not been found after such a long period.

The delegate of BURKINA FASO thanked the speakers. He noted the strong message delivered by Mr. Osakwe: that a failure in the Doha Round would have negative consequences for the world economy. He noted that developing countries, in particular the C4 countries, had much hope in a successful conclusion of the Doha Round, but realize today the challenges that exist. He asked when the negotiations would start again, and what the C4 countries and international organizations could do to bring the Doha Round to a successful conclusion.

The delegate from ARGENTINA expressed his appreciation to the Chair and the speakers for describing the problems faced. He noted that despite high cotton prices in the past two years, still over half of world cotton production was subsidized and wondered whether this meant that some countries are not sufficiently efficient to grow cotton. He noted that the elimination of all subsidies to cotton production, discussed within the ICAC since 1985, was still a valid objective to achieve. He said that income from cotton production was essential to the livelihoods of some agricultural communities in Argentina and Africa. He noted that the delegation from Argentina agrees with everything that has been said by the Argentine speaker. He emphasized that

solidarity amongst countries and strong support to the WTO negotiations was essential to come to a successful completion of the Doha Round, including in particular the cotton issue. He urged delegates to convey to their governments the importance of supporting the Doha Round and to increase their efforts to make it end favorably for the lesser developing countries.

The delegate of INDIA asked Mr. Osakwe how to handle the fact that commodities have become asset values in the last few years, given his observation that trade policy be a companion of monetary and fiscal policies.

The delegate of TOGO thanked the speakers and asked how much longer the Doha Round negotiations would continue before reaching a conclusion.

Mr. Osakwe answered the delegate of India that the ICAC Secretariat was better qualified to answer questions on commodity price fluctuations. However, he noted that the lower the level of trade restrictions and subsidies would be (on the three pillars discussed within the WTO agricultural negotiations), probably the more stable commodity prices and markets would be. He added that beyond the trade area, there were some price risk management mechanisms that could be used to face price volatility.

Mr. Osakwe answered the delegate of Togo that the Doha Round negotiations would end when a consensus is achieved amongst all WTO member

countries. He said this has not been possible yet. He reminded that we are in a period of rebalancing among world political powers so no one really knows when this will settle. He added that it can take a long time to reach WTO agreements because members then commit themselves to binding agreements.

The delegate of EGYPT thanked the speakers. He noted that subsidies to cotton production should be replaced by technical support to the cotton sector (training, infrastructure, etc.), in order to raise productivity and farmers' incomes. He agreed that the Doha Round negotiations needed to be continued, as there is no possible alternative solution.

The CHAIR made concluding remarks. He noted in particular the continued existence of distortions and subsidies in the cotton sector; the deadlocked situation in the Doha Round, which needs to be addressed; the fact that technological innovation in cotton producing countries could allow an increase in competitiveness of cotton production; and that price volatility was a concern for many countries and an issue that needed to be further discussed. He noted however, that price volatility had always existed as a result of various factors. He concluded that since some countries do not have alternative crops to cotton, the rest of the international cotton community needed to show solidarity with them.

The CHAIR adjourned the meeting at 10:40 hrs.

Second Plenary Session

Statements

9:00 hr. Wednesday, September 7, 2011

Dr. Enrique Roberto Orban in the Chair

The CHAIR called the meeting to order.

The CHAIR invited the representative of the International Trade Centre (ITC) to speak. The representative said that this was the fifth 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 69th ICAC Plenary Meeting in the six following areas: Sector Strategy Development, Capacity Building in Cotton Trade and Marketing, Capacity Building of Cotton-related Associations at National and Regional Level, Facilitation of South-South Cooperation, Promotion of African Cotton, and Reduction of Cotton Contamination at Gin Level. 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. ITC'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 referred delegates to the document that had been distributed, presenting the research areas of CIRAD and those of CORAF/WE CARD, the West and Central African Council for agricultural research and development. One of CIRAD's priorities is to conserve and explore genetic resources. He encouraged developing countries to take measures to ensure the sustainability of cotton research. He noted that unfortunately, the number of researchers was declining in many developing countries, in particular in Africa. He suggested that both the private and the public sectors cooperate to build an efficient research system. He said that the ICAC may be able to gather information regarding the diversity of research systems in the

world, in particular those involving participation from the private sector. CIRAD's statement is a document of the meeting.

The Executive director of the International Forum for Cotton Promotion (IFCP) reported on the activities of the IFCP since the last plenary meeting. The IFCP encourages countries to promote domestic cotton consumption. He noted that recent price volatility combined with weak consumer demand had resulted in a decline in the market share of cotton. This trend highlights the importance of demand enhancement efforts. He noted the continued damaging impact of misinformation presented by NGOs and some groups promoting alternative cotton production programs (organic, etc.). He reported on the success of the IFCP Speakers Bureau and CottonMentor. The CottonExpert program produced its first video in 2010/11. The IFCP's report is a statement of the meeting.

The representative of the International Cotton Association (ICA) explained that their mission was to promote good trading practices for the global cotton trade based on contract sanctity.

It welcomes membership to all sectors of the cotton trade. The ICA currently has over 400 members and an international board. The ICA is a leading cotton arbitral body, which regulates the global cotton trade and provides for contract dispute resolution. He encouraged governments to promote sound trading conditions with transparent and predictable trade policies. He asked that tariff and non-tariff trade barriers be kept to an absolute minimum and that changes be announced clearly and early. He noted that extreme price volatility undermines sound trading practices and that the ICA would receive a record number of applications for arbitrations in 2011. The ICA encourages governments to promote sound macroeconomic policies that produce a stable price and trading environment. The ICA supports the concept of sustainability in the cotton supply chain, in particular by supporting the BCI and contract sanctity. ICA is finalizing a joint venture agreement with the Bremen Cotton Association, which will provide cotton quality testing and research services, as well as developing accreditation services for laboratories around the world, and would work closely with the CSITC. He noted that the ICA offers training seminars and trade events in various countries. He invited the participants to attend the ICA annual trade dinner in Liverpool on October 19 and 20, 2011. The ICA's report is a statement of the meeting.

The delegate of the European Union (EU) thanked the ICAC, the organizing committee and the government of Argentina for preparing the 70th Plenary Meeting of the ICAC. He provided an update with respect to the agricultural, trade and development assistance dimensions of the EU common policies and strategies towards cotton. He noted that after years of downward trend for both yield and area, a slight recovery was noticed recently. The EU became a net exporter of cotton in 2009, as the level of imports continues to decline. The EU market for cotton is completely open. The EU has already eliminated trade-distorting support to cotton since 2004. He summarized the achievements of the EU-Africa Partnership on Cotton since 2004. The total value of cotton support is greater than 350 million euros, half managed by the European Commission. The EU is the largest provider of development assistance on cotton. The representative noted that the EU supports an ambitious outcome to the Doha Development Agenda, and he emphasized that the position of the EU on cotton in the WTO would not change. The representative reported that the procedure within the EU to authorize membership in the ICAC had been launched, and he was confident of a positive outcome. The EU's report is a statement of the meeting.

The delegate of the Common Fund for Commodities (CFC) reported that during 2011 two new joint CFC/ICAC projects had been developed and were likely to become operational soon. The first project, initiated by the Dutch

NGO Solidaridad, is a pilot project that will use well-established producer organizations in Tanzania and Zambia to effectively reach smallholders producers, providing increased access to technical assistance, producer finance, national and international markets, support for capacity building, and options for product diversification and value addition. The second project will provide assistance to Kenya and Mozambique to develop and introduce instrument-based 100% bale testing in both countries. This second project will be considered by the Fund's Executive Board the week following the 70th Plenary Meeting. Overall, 13 full-scale projects and 12 smaller projects have been developed under CFC/ICAC. He noted that the results of six completed projects would be assessed and the resulting report would be published soon. He also highlighted one of the core principles of the CFC projects, that the results of CFC projects be shared and made available to all interested cotton producing countries. He concluded by calling on African countries to be actively involved in the final stage of the CFC/ICAC project on Commercial Standardization of Instrument Testing of Cotton. The CFC's report is a statement of the meeting.

The President of the African Cotton Association (ACA) thanked the executive director of the ICAC for his work and the ICAC Secretariat for its services provided to African cotton. He thanked the Argentine government and people for their generous hospitality, and everyone else who contributed to the success of the 70th Plenary Meeting of the ICAC. He noted that in the last two years, the ACA with the help of the ITC and the EU had developed a strategy for 2011-15. This strategy involves five objectives: defend African cotton sectors, contribute to the recovery of production through the improvement of competitiveness and value-addition; preserve and improve African cotton quality; make ACA the platform of reference information on African cotton; ensure a dynamic commercial promotion of African cotton. The ACA was reorganized, with the identification of four regions (North, West, Center, East and South) and a Vice-President for each. Five technical commissions were created within the ACA, with specific missions. He concluded by asking whether it was time, within the WTO, to switch the action of African countries from the Doha Round negotiations to file a complaint in the dispute settlement system. The ACA's report is a statement of the meeting.

The Delegate of MOZAZIMA (Mozambique-Zambia-Zimbabwe-Malawi) thanked the ICAC and the government of Argentina for giving his organization the opportunity to address for the first time an ICAC plenary meeting. He explained that cotton is a strategic cash crop for the four countries and has substantial growth potential. However, the four countries also face similar difficulties in their respective cotton sectors and

challenges to compete in international markets. Over the last two years, the MOZAZIMA concept was developed: the overall aim of the group is to bring cohesiveness to the disparate national initiatives; regional cooperation is necessary to increase cotton production and productivity and to alleviate poverty; MOZAZIMA will create a transparent cotton sector in the region through information sharing, identifying and promotion of best practices along the entire cotton value chain; it will create and forge synergies for regional cooperation. Some priority areas were identified, with each country managing the activities of one or two priority areas. MOZAZIMA's report is a statement of the meeting.

The representative of the Aid by Trade Foundation (AbTF) thanked the ICAC for giving him the opportunity to make a statement during the 70th Plenary Meeting of the ICAC. He explained that since its creation in 2005, the initiative Cotton made in Africa (CmiA) of AbTF had become a strategic alliance with partners on the retail side, cotton trade companies operating in Africa, social and environmental NGOs and development institutions. He said that AbTF aimed at bringing benefits to each player along the cotton/textile chain, but that the special focus of the initiative Cotton made in Africa was to improve the livelihoods of a large number of small African cotton farmers. Today about 240,000 farmers and seven cotton companies are verified according to the CmiA standard, and over 90,000 tons of CmiA lint was produced in 2010/11. He noted that CmiA is traded at world market prices, with no premiums. However, a licensing fee is levied at the retail level to finance social and technical projects in the communities of participating farmers. He noted that BCI and AbTF/CmiA were in the process of benchmarking their standards in order to harmonize them, to minimize confusion in the cotton sector about various initiatives and standards. He encouraged delegates to consult their web page for more information. The AbTF's report is a statement of the meeting.

The delegate of the German International Cooperation (GIZ) noted it was the fourth consecutive time GIZ was participating in the ICAC Plenary Meeting and thanked the Committee for giving him the opportunity to present their work on cotton. GIZ is a government-owned private company, with the objective of supporting reforms and change processes in developing and transformation countries, aiming at improving the livelihood of people. Since 2005, GIZ and DEG (German Development and Investment Agency) have been actively involved in the strategic alliance with the AbTF and its CmiA initiative. Currently GIZ in cooperation with DEG and AbTF are implementing the Competitive African Cotton Initiative (COMPACI), with the financial support of the Bill and Melinda Gates Foundation and the German Ministry for Economic Cooperation and Development, as well as

from private cotton companies based in Africa. COMPACI applies the same basic measures as CmiA (training smallholders in sustainable farming techniques, pre-financing production inputs, etc.). The objective is to sustainably improve the living conditions of over 265,000 small cotton farmers in six African countries by 2012. GIZ's statement is a document of the meeting. The GIZ's report is a statement of the meeting.

The delegate of ACTIF (African Cotton & Textile Industries Federation) explained that the organization was created in 2005 to increase trade in African cotton, textiles, and apparel. It represents a unified voice for the African textile industry. Its members include 34 national textile and cotton organizations from 19 countries in East, Central and Southern Africa. ACTIF is attempting to gain members in West Africa as well. He noted that currently most of African cotton production is exported with almost no value addition, and that significant opportunities exist in the processing of cotton in Africa.

The delegate of BCI presented a report for inclusion in the meeting. The BIC's report is a statement of the meeting.

The representative of SEEP (Expert Panel on the Social, Environmental and Economic Performance of Cotton Production) explained that the Panel was created in 2007, following the 65th Plenary Meeting, with the mission of providing to the ICAC factual information on cotton production practices. It currently has 13 members. She said that following SEEP's report to the 69th Plenary Meeting on insecticide use in cotton production in five producing countries, they received a complete dataset on the use of pesticide in Togo for 21 years. She thanked the New Cotton Company of Togo for providing these data free of charge. SEEP will incorporate these data into the report released in 2010 to provide a more comprehensive view of insecticide use in cotton worldwide. SEEP is also working to complete a series of fact sheets on topics relevant to the performance of cotton production (energy use, greenhouse gas emissions, insecticide use, etc.). SEEP concentrated its work in 2012 on a survey of labor use in cotton. Eleven countries responded to the survey and SEEP is in the process of organizing the data received for summary, analysis and publication during 2012. She thanked the countries that answered the survey. She thanked the ICAC for supporting the work of SEEP and urged member countries to continue providing the panel with data needed for a comprehensive view of cotton production worldwide. SEEP's report is a statement of the meeting.

The delegate of the Inter-American Institute for Cooperation on Agriculture (IICA) thanked the ICAC and the organizing committee for inviting it to participate in the 70th Plenary Meeting of the ICAC.

The delegate of INDIA thanked the ICAC and the government of Argentina for organizing the 70th Plenary Meeting of the ICAC. He noted that cotton price volatility in 2010/11 had been extreme, and that the sharp decline in prices in the second half of the season severely affected the Indian textile industry. He emphasized the uncertainty regarding cotton consumption during 2011/12, a season of strong increase in global cotton production. Indian cotton stocks are expected to rise significantly in 2011/12, and farmers will suffer from depressed prices. He said that India appreciated the work undertaken by ICAC to answer India's call in September 2010 to address the issue of price volatility. He noted in particular that the Beijing workshop needed to be followed up by measures to increase data transparency and that the ICAC Secretariat should continue to work with member countries in this regard. He asked that following the high number of contract defaults in 2010/11, at all levels in the cotton chain, that the ICAC Secretariat undertakes an international evaluation in consultation with the PSAP on contract performance during 2010/11 and on a longer time scale of five years. He suggested that the findings of the study could help develop a global best practices guide, a model contract document and recommendations for building arbitration institutions that could be used by both the public and private sectors. He said that India supports the establishment of an International Centre for Cotton Research as a virtual center operational in major cotton producing countries. India commends the efforts being undertaken under SEEP umbrella. He noted that the WCRC 5 that will be held in Mumbai in November 2011 will allow a constructive dialog and take research initiatives forward. He offered two suggestions to the ICAC Secretariat: first, the apparent need to look at a sustainable financing model of the ICAC for the next few years; second, looking into the possibility of organizing a mid-season meeting of ICAC members in Washington, DC, in early 2012, to enable policy corrections if prices were to moderate significantly. India's Country Report is a statement of the meeting.

The delegate of CHAD thanked the government of Argentina for organizing the 70th Plenary Meeting of the ICAC and congratulated the ICAC for the good organization of the meeting and the relevant choice of topics. He said that cotton production in Chad started a long time ago, but recently fell to a low of 14,000 tons in 2009/10. Exogenous and endogenous factors explain the decrease in cotton production. However, farmers are coming back to cotton, and in the last year the government increased its support of the cotton sector, accompanying the dissolution of the old cotton company and the creation of a new company, Cotontchad SN. The President of Chad has positioned its new five-year old mandate under the sign of rural development. The slow recovery in production

and the active support from the government suggest a promising future for the new cotton company. Chad's Country Report is a statement of the meeting.

The delegate of PAKISTAN thanked the government of Argentina for organizing the meeting and the ICAC Secretariat for its work. He noted that cotton is a major cash crop in Pakistan, of significant importance to the economy of the country and to its textile sector. Cotton production is expected to recover in 2011/12 after a decline last season due to floods. He noted that Pakistan has no restrictions on import and export of cotton. He noted the existence of a number of issues faced by the cotton sector, including low yields, the prevalence of the cotton leaf curl virus, limited availability of quality cotton seed and appropriate varieties, slow progress in the adoption of biotech cotton, absence of standardization and grading system, poor management practices, contamination of cotton, and post-harvest losses. In order to address these issues, the government is implementing a five-year plan under the "Cotton Vision 2015." The aim is to increase the average yield and to improve the recovery rate, so as to increase cotton production. He described the various strategies envisaged in order to achieve these objectives. He noted that the government of Pakistan is grateful to ICAC and to other partners, in particular the United States, for their support in enhancing cotton production and improving fiber quality. He said that Pakistan's delegation was slightly disappointed by the result of the talks regarding the possibility of establishing an international research center for cotton. Pakistan's Country Report is a statement of the meeting.

The delegate from POLAND reported on the status of the cotton sector in her country. She noted that cotton consumption continued to decline in 2010, while imports remained stable. Most cotton comes from Central Asia. Cotton is consumed in Poland by two spinning mills and another mill that produces cotton-flax yarn. Production of fabrics, terry toweling products, bed linen and other textiles as well as knitted fabrics is based almost entirely on imported yarns. The Polish market suffered from shortages of cotton yarn in the second half of 2010, which disturbed textile manufacturing. The first five months of 2011 suggest a more optimistic outlook regarding textile production, including production of cotton yarn. She said that the Gdynia Cotton Association (GCA) had to speak louder and louder to defend the interests of the Polish textile and clothing industry before the Polish government and at the EU level. She summarized the activities of the GCA and emphasized that the GCA is promoting the principle of fair trade rules and merchants' honesty. Poland's Country Report is a statement of the meeting.

The CHAIR adjourned the meeting at 10:40 hrs.

11:00 hr. Wednesday, September 7, 2011
Dr. Enrique Roberto Orban in the Chair

The CHAIR called the meeting to order.

The Chairman of the Private Sector Advisory Panel (PSAP) read the report of the PSAP, which had met the previous day. He talked about the four issues that had been discussed: volatility in cotton prices, Better Cotton Initiative (BCI), harmonization of phytosanitary certificates and electronic bill of lading, and debunking myths about cotton production. The main topic currently of interest to the PSAP is volatility of cotton prices, which was extreme during 2010/11. Despite the absence of a complete solution to this issue, the PSAP recommends several actions to address it: the PSAP called on government official to improve collection and reporting of cotton statistics; it is supporting preventive measures to be taken by government and private sector to minimize the damage of cotton price volatility; it asks the Secretariat of the ICAC to investigate the correlations and time lags between cotton and yarn prices to determine whether it would be feasible to hedge yarn prices using cotton futures; it opposes the implementation of bans or limits on exports and imports of cotton; it urges governments and private sector associations to take more efficient measures in honoring awards in case of contract defaults and encourages the use of mediation on an international level to avoid arbitration. The PSAP expressed its concerns regarding the BCI, in particular regarding the confusion coming from the use of "Better Cotton" for cotton that was not inherently better, and for the risk of this initiative to become another certification program that will fragment the cotton market. The PSAP asked the Secretariat of the ICAC to investigate whether there is a role for ICAC in developing metrics for the measurement of responsible production practices. The PSAP thanked the Secretariat of the ICAC for raising awareness about the FAO model phytosanitary certificate and asked the Secretariat to investigate the reason for the lack of harmonization of an electronic bill of lading amongst countries. Finally, the PSAP encourages the Secretariat and SEEP to continue providing factual information about cotton production practices and its environmental and social impacts. The PSAP thanked the Argentine government for organizing the 70th Plenary Meeting of the ICAC. The PSAP's report 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 services through extension 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 government notes the lack of progress in the WTO negotiations, which will continue to hurt its efforts to revive the Kenyan cotton industry. Kenya's Country Report is a statement of the meeting.

The delegate of PERU thanked the ICAC for approving the return of Peru as a member of the Committee. He noted that Peru was one of the founding members of the ICAC. He presented the apologies of the Minister of Agriculture of Peru for not being able to attend the Plenary Meeting. He reminded that Peru was forever grateful to Argentina for its help in achieving their independence and that Peru had withdrawn from the ICAC in the 1990s for political reasons. He noted that some of the primary roles of ICAC were information gathering, organization and capacity management and that the reactivation of Peru's membership would help it be better prepared to revive its cotton sector. He noted that Peru's cotton production was now significantly smaller than in the past. He thanked the organizing committee and the ICAC for organizing the plenary meeting. Peru's Country Report is a statement of the meeting.

The CHAIR thanked the delegate of Peru and recognized the excellent relationships between Argentina and Peru.

The delegate of ARGENTINA noted that the country statement of Argentina had already been distributed, and that he was going to read a statement dealing with cotton policies. He said that Argentina was very pleased to host the 70th plenary meeting of the ICAC and thanked the delegates, international organizations and other participants for attending the meeting. He said that cotton production in Argentina had recovered strongly in the last few years, thanks in particular to the increase in cotton prices and the improvement in cotton productivity through the utilization of new technologies and production systems and the modernization of the infrastructure. However, he noted the persistence of distorting cotton support policies in many countries, and asked whether the diminution in support to cotton that was measured in 2010/11 was the result of short- and medium-term policies or only the result of increased international cotton prices. He noted that such distortions were harming countries where cotton accounted for a significant part of the GDP and rural income in some regions. He said that within the unfinished Doha Round negotiations, the Government of Argentina is concerned about "box-shifting," in which domestic subsidies could be reformulated

to remain WTO-compliant. He said that Argentina was ready to continue working towards an ambitious and balanced outcome, consistent with its development mandate. He concluded by insisting that the Doha Round negotiations continue with this objective of reducing cotton subsidies, in order to make the cotton sector more equitable. Argentina's Country Report and his statement on Cotton Policies are statements of the meeting.

The delegate of AUSTRALIA thanked the Argentine government for hosting the 70th Plenary Meeting of the ICAC. He noted that cotton production in Australia had recovered strongly in 2010/11 thanks to above average rainfall and high cotton prices, and that record production was expected in 2011/12. The Australian cotton sector has faced many challenges over recent decades, with climate change emerging as a new risk factor. He noted that partnerships between the public and private sectors had been a key factor in responding to these challenges and increasing productivity. He explained that a new strategy for the cotton sector, with priorities for national research and capacity building, had been endorsed this year by the private and public sectors. The Australian cotton sector continues working towards improving the quality of its cotton and its marketing program. Australia encourages member governments to actively participate in seeking a meaningful outcome to the Doha Round, in order to liberalize trade in cotton and other agricultural commodities, and stop the decline in cotton's share of the fiber market. He reminded that even in the current context of volatile cotton prices, the Australian government believes that no government support is necessary. He stated the pride of the Australian cotton sector to produce the highest yielding and very good quality cotton in the world, while respecting high environmental standards. Australia's Country Report is a statement of the meeting.

The delegate of EGYPT thanked the Argentine government for hosting the 70th Plenary Meeting of the ICAC, as well as all participants, the ICAC Secretariat and the interpreters. He recognized the importance for the Egyptian cotton sector to attend plenary meetings. He summarized the recent trends in production in Egypt, noting the recovery in production expected in 2011/12 due to high cotton prices and restrictions on rice area in order to reduce water use. He noted that the Egyptian cotton sector was working to produce cotton of high spinning value, high yield, short duration and to apply integrated pest management and minimize pesticides 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 said that Egypt was making efforts to adopt instrument testing to measure cotton fiber quality. He noted that Egypt was encouraging the development of

the textile industry. Egypt's Country Report is a statement of the meeting.

The delegate of TURKEY thanked the government of Argentina for hosting the 70th Plenary Meeting of the ICAC. He highlighted some of the areas of their country report. He noted the importance of the agricultural sector in Turkey despite its progressive decline. Turkey has enjoyed a high economic growth since 2000, even accounting for a slow-down in 2008. He noted the failure of the international cotton industry to foresee the extreme rise in cotton prices during 2010/11. These high prices drove cotton area up significantly in Turkey in 2011/12, and despite an expected harvesting delay, production is expected to reach a record. He noted that cotton yields in Turkey had increased significantly over the years thanks to conventional breeding. Machine picking has increased, also increasing productivity. He noted the need for large cotton imports to augment the Turkish textile industry, due to the drop in cotton production in the 2000s. The Turkish textile industry remains competitive and large. The delegation of Turkey appreciates ICAC's initiative to improve the collection, analysis and dissemination of data on cotton supply and use. This will allow stakeholders in the cotton sector to make better-informed decisions. The government of Turkey will take this opportunity to review and improve, if necessary, their own methods of assessment of cotton production, consumption and stocks. Turkey's Country Report is a statement of the meeting.

The delegate of BURKINA FASO thanked the Argentine government for its hospitality and the ICAC Secretariat for its work achieved during 2010/11. He noted the relevance of the theme of the Plenary Meeting, "Public and Private Sector Roles in the Cotton Value Chain: Ensuring Both Efficiency and Fairness." He acknowledged the quality of the presentations and debates, which show the usefulness of the ICAC and the necessity for countries to share their cotton information with the Secretariat. Burkina Faso is convinced that the improvement of cotton competitiveness in the world requires progress in research and the implementation of technical and technological innovations, and that this is even truer for Sub-Saharan African cotton sectors. The delegation from Burkina Faso encourages non-member countries to join the ICAC in order to increase the sharing of information and experiences amongst members. Burkina Faso also encourages WTO members to work towards a successful conclusion of the Doha Round, taking into account the Cotton Initiative. He thanked the countries that were helping the C4 under South-South relationships, as well as multilateral and bilateral partners. Burkina Faso's Country Report is a statement of the meeting.

The delegate of TAIWAN thanked the Government of Argentina and the Secretariat of the ICAC for organizing the 70th Plenary Meeting. He summarized the recent trends in cotton

consumption and imports in the country, noting that Taiwan's textile industry had modernized its operations and developed new products over the last few years, to adapt to changing global demand. The cotton spinning industry worked hard to improve its productivity, and some spinning mills are producing organic cotton textiles. In general the textile industry is trying to develop its production of eco-friendly functional textiles. He noted that Taiwan is honored to be a member of the ICAC since 1963 and plays an active role in the Committee. Taiwan invites other members to learn from its own experience in textile production. Taiwan's Country Report is a statement of the meeting.

The delegate of TANZANIA expressed his country's gratitude to the Government of Argentina for hosting the 70th Plenary Meeting of ICAC, and to the Secretariat for its excellent work. He noted the economic importance of cotton in Tanzania, where it helps to alleviate poverty in rural communities. He said that drought had affected cotton production in the last two years, and that other constraints to production included low input application, inadequate extension services and low mechanization. The current implementation of the 2nd Strategic Plan should develop contract farming, seed production, early planting of cotton, extension services, and mechanization through the use of ox-drawn planters and weeders. Tanzania's Country Report is a statement of the meeting.

The delegate of UGANDA congratulated the Government of Argentina for hosting the 70th Plenary Meeting, recognized the work of the organizing committee and thanked the Secretariat of the ICAC and its executive director for their services. She noted that the Ugandan government continues to support cotton production as part of a strategy to increase household incomes, create employment and as a source of foreign exchange. She explained that the Cotton Development Organization (CDO) had partnered with ginners to strengthen and consolidate support to cotton production, as well as increase productivity. In particular, this has allowed the CDO to provide farmers with quality seeds, production inputs and extension services. This has allowed a strong recovery in production in 2011/12. Uganda is continuing to progress in the testing of biotech cotton. She noted that the projected decline in cotton prices in 2011/12 would not come at a good time, given the strong increase in cotton area in Uganda. She thanked the ITC and in particular Matthias Knappe for its support to the Ugandan cotton sector. Uganda's Country Report is a statement of the meeting.

The delegate of ZIMBABWE noted that cotton is one of the major cash crops produced in his country. About 250,000 farmers cultivate an average of 1-2 hectares of cotton each. Average cotton production since 2000 has fluctuated around 110,000 tons of lint. Higher production is targeted in 2012. He summarized the main fea-

tures of cotton production in Zimbabwe (yield, ginning out-turn, lint quality, ginning capacity). Cotton is the second highest earner of foreign currency in the agricultural sector after tobacco. He noted that the domestic spinning industry had faced numerous difficulties, and that in 2010 less than 10% of production was absorbed by domestic spinners. Almost all cotton is grown under contract farming, security for this investment being provided by a national regulatory framework. Zimbabwe aims to produce 1 million tons of seedcotton by 2020, primarily through an increase in yields. Zimbabwe's Country Report is a statement of the meeting.

The delegate of ZAMBIA thanked the government of Argentina and the ICAC for organizing the 70th Plenary Meeting of the ICAC. He noted that the timing of the meeting was important for Zambia, as production had recently been recovering. Production is expected to continue rising in 2011/12 due to the high prices received last season. The cotton sector in Zambia is almost fully privatized. Coffee and tobacco are competing crops but are facing problems. Cotton is an important contributor to Zambia's work force and the livelihood of 1.4 million people. He noted that the Cotton Board of Zambia, whose creation had been decided in the 2005 Cotton Act, was now operational and having an increasing impact on the cotton sector. Some challenges remain, including in particular low yields, lack of value addition, inadequate credit support and side buying/selling. The participation of farmers in seedcotton pricing has been increasing in recent years, under the umbrella of the Cotton Association of Zambia. Zambia has benefited from its membership into ICAC, in particular regarding market information, improved cotton production technologies, and linkages to donors. Zambia's Country Report is a statement of the meeting.

The delegate of MALI thanked the organizing committee and the ICAC for preparing the 70th Plenary Meeting. He said that cotton was the engine of economic development in Mali. The government is the main stakeholder in the Compagnie malienne pour le développement du textile (CMDT). Privatization of the CMDT has been in progress since 2001 and should be completed soon. He noted that the partners of CMDT should be aware that the privatization process would not affect contractual arrangements. He noted that due to the strong increase in cotton prices during 2010/11, an ambitious production target of 500,000 tons of seedcotton had been set for 2011/12. To accompany this objective, the seedcotton producer price was increased from 185 FCFA/kg in 2010/11 to 255 FCFA/kg in 2011/12. However, he said that all these efforts to increase production were useless as long as the world cotton market continued to be distorted by subsidies in some countries.

The delegate of the UNITED STATES congratulated the organizing committee for the successful

preparation of the 70th Plenary Meeting of the ICAC. He said that the US country statement had already been distributed. He highlighted two sections in this statement: on page 27 is a list of USDA websites containing useful information on the US cotton sector (showing the US efforts to increase transparency on US cotton supply and use statistics) and on page 19 are described the US efforts to promote cotton consumption, domestically and internationally. He encouraged other countries to take advantage of the IFCP to promote domestic use of cotton. He also highlighted the recent efforts of the United States in the area of cotton development assistance with the West Africa Cotton Improvement Program (WACIP) as well as the engagement of the Millennium Challenge Corporation in agricultural programs in West Africa. United States' Country Report is a statement of the meeting.

The delegate of SOUTH AFRICA thanked the Argentine government for hosting the 70th Plenary Meeting of the ICAC. He noted that cotton production in South Africa had increased in 2010/11 for the first time in seven years, and that prospects for 2011/12 remained favorable. However, cotton consumption continues to decline due to imports of cheap textile products from Asia. Cotton imports remain significant to fill the gap between production and consumption. He noted that there were many similarities between the Argentine textile chain and the South African textile chain and recommended that his government engage with the Argentine government and relevant stakeholders in the Argentine textile industry in order to learn from their experience in order to enable the recovery of the South African cotton value chain. South Africa's Country Report is a statement of the meeting.

The delegate of MEXICO thanked the Argentine government and the Executive director of the ICAC for inviting Mexico to participate in the

70th Plenary Meeting of the ICAC. He noted that while cotton area in Mexico was currently much smaller than in the 1960s, a significant rise in yields over the last few decades made up for a large portion of the area loss, and production was only one third lower. He presented the national project of the Mexican cotton sector to increase cotton area over the next few years, with the objective of increasing production, cotton-related employment and reducing cotton imports for its textile sector. Mexico's Country Report is a statement of the meeting.

The delegate of JAPAN made a brief report on the state of the Japanese textile industry. He noted that while the national economy had started recovering after the earthquake and tsunami of March 2011, the textile industry was continuing to shrink. There are 1 million spindles in Japan, but many Japanese spinners have relocated their spinning equipment overseas. He exposed three requests to cotton producing countries: efforts need to be made to stabilize prices in the cotton sector; efforts need to be made to ensure sanctity of contracts; improvements need to be made to provide high quality cotton (free of contamination) to spinners. He noted that Japanese spinners had not seen any improvements regarding contamination for many seasons. Japan's Country Report is a statement of the meeting.

The delegate of BRAZIL thanked the government of Argentina and the ICAC for organizing the 70th Plenary Meeting. He highlighted several important issues that had already been emphasized at previous Plenary Meetings: 1) elimination of subsidies that distort the local or international market; 2) increasing transparency in cotton supply and use statistics; 3) adoption of international parameters for classification of cotton and provision of HVI data for each bale, to help farmers receive fair prices; 4) bale by bale identification to allow traceability; 5) increased interaction between the public and

private sectors to find solutions for the cotton sector together; 6) helping small farmers to organize themselves in order to allow economies of scale; and 7) provide support to cotton farmers through growers associations such as ABRAPA in Brazil, in particular to manage input provision more effectively.

The delegate of INDIA asked if the delegate of ARGENTINA could complete his statement. He noted that the gap between plenary meetings was too long and recommended the organization of a spring meeting in Washington, DC. He also recommended developing a sustainable financing model for the ICAC Secretariat, noting that financial contributions to the Committee had been static for some time.

The delegate of ARGENTINA thanked the delegate of INDIA and finished reading his statement. He then commented on the question of having a sustainable financing model for the ICAC Secretariat. He noted that some member countries had asked that the budget of the ICAC Secretariat remain stable in 2011/12. He noted that while the economic situation of many countries was currently difficult, it was also true that the value of the U.S. dollar was declining. Therefore maintaining a stable budget in U.S. dollars may not be recommended, since it was in fact reducing the ability of the Secretariat to fulfill the increased number of requests from the Committee. He noted that the efficiency of the Secretariat may be affected by this decision to maintain the budget at a stable level.

The executive director thanked the delegates of India and Argentina for their endorsement of the work of the Secretariat. He said that administrative matters would be dealt with during the meeting of the Steering Committee on September 8.

The CHAIR adjourned the meeting at 13:15 hrs.

First Open Session

The Roles of the State and the Private Sector in Technology Change

12:15 hr. Monday, September 5, 2011
Ing. Agr. Carla Campos Bilbao in the Chair

The CHAIR recognized the excellent arrangements made by the Organizing Committee for this Plenary Meeting and provided the background for discussion of the roles of the state and the private sector in technology change. She said that for Argentina, the discussion needs to be framed in a context of changing ideological, political, and technological paradigms, from ones that produced substantial social exclusion in the 1990's to others that put people's welfare at the middle of the discussion in the last decade.

Technological development must now be guided by social inclusion, fairness, and sustainability; and international cooperation for exchange of technology under this new set of paradigms is critical.

The CHAIR invited Mr. Patrick Packnett, Chairman of the Standing Committee to summarize the report from the Standing Committee on a Proposal to Create an International Center for Cotton Research. The 69th Plenary Meeting instructed the Standing Committee to review prospects for the creation of an International Center for Cotton Research and to prepare a

report for the 70th Meeting. Mr. Packnett said that the Standing Committee had discussed this topic at three separate meetings since the last Plenary. The Committee reviewed the expert report commissioned by the Secretariat, which suggested the Committee consider three variations for the establishment of an international center: an international center with its own campus, a formal network of cooperating nodes, and a virtual center. Mr. Packnett noted that while some delegates believed the creation of a virtual center might be possible, others questioned the need for an international center. At subsequent

meetings the Secretariat had presented proposals for the creation of an International Cotton Solutions Center to be housed within the ICAC Secretariat, but with separate funding. However, some delegates continued to ask what failures in existing research structures necessitate the creation of an international center. Delegates noted the need had not been documented and further expressed concern about trying to expand budgets and increase activities in international organizations when many countries were experiencing severe fiscal challenges. At the 512th Meeting of the Standing Committee, the Government of Australia presented a proposal to have a small group of experts develop a strategy for world cotton research that would develop a shared understanding of research priorities and existing capabilities and identify gaps and how the gaps might be addressed. This proposal is included in the Standing Committee's report. The Report of the Standing Committee "The Creation of an International Center Cotton Research" is a document of the meeting.

The CHAIR invited Ing. Luis Basterra, Vice-president, National Institute for Agricultural Research (INTA), to present his vision and strategy regarding the role of government and the private sector in technology change in Argentina. Ing. Basterra indicated that cotton was first planted in this region in 1584, and textiles were the first officially recorded exports of Argentina. Cotton production in the northern sub-tropical provinces of Argentina started in the 1930s in small-scale farms (less than 10 hectares) using mostly family labor. In the 1940s and 1950s, mechanization and import substitution fostered increases in cotton area, and some farms became medium size (between 10 and 200 hectares). During the 1970s and the 1990s capital-intensive big scale farm (more than 200 hectares) developed based on new production models. He said that all three types of farms coexist today in Argentina, each with different input use intensities. The sustainability of all farms depends on profitability. However, while production decisions are closely related to quality of life and potential for development in small-scale farms, production decisions are more closely related to the return on capital investments in big scale farms. The role of government is to facilitate coexistence by focusing on increasing productivity for each type of farmer rather than on paternalistic measures; and technology plays a central role in productivity enhancement. Technological advances for big scale farms are usually driven by profitability of private input producers (planting seed, chemicals, machinery, etc.). However, the public sector must lead technological advances for small and medium scale farms, which due to the limited scale of their production systems might not be profitable for the private sector to undertake.

Mr. Basterra said that INTA has been developing and validating new technologies for small

and medium scale farmers for more than 50 years, with a focus on the quality of life of rural families, rural family retention (i.e. avoiding migration to cities), and creation of local value chains. INTA is a public institution managed by representatives from the federal government, universities and producers, and conducts research and extension activities. Mr. Basterra stated that articulation of activities between the public and the private sector is critical for the sustainability of the cotton sector. An example of those required synergies was the development of the narrow row planting system in Argentina as a response to the reduced attractiveness of the cotton crop for small-scale farmers in the early 2000s and the consequent rural-urban migration. INTA developed a new cotton stripper specially designed for small and medium scale farmers that can be pulled by a 50-60 hp tractor (the type of tractor available to those farmers). The new picker marked the beginning of a re-engineering process of crop production for small producers that reduced the need for labor, shortened the growing cycle, increased yields, reduced harvesting cost and increased profitability. The picker was designed by INTA, but its production was licensed to the private sector. Similarly, INTA articulated the production of the appropriate planting seeds with the private sector. In Colonia El Alba, Formosa, 12 producers planting 30 hectares obtained yields of 900 kilograms of seed cotton per hectare in 2005/06, but after adopting the new growing system obtained yields of 1,600 kilograms per hectare in 2010/11. Argentina is proud to have developed technological changes that facilitate social inclusion. Mr. Basterra's presentation is a statement of the meeting.

The CHAIR invited Dr. Charudatta Mayee, President, Indian Society for Cotton Improvement, to discuss the roles of the state and the private sector in technological change in India. Dr. Mayee stated that without government policies and support there cannot be any growth. He explained that since 1952, India experienced six differentiated periods of technological change, one per decade. Between 1952 and 1962, the area planted to *Gossypium hirsutum* increased from 32% to 40% of the total cotton area, replacing *Gossypium arboreum*. Varieties were developed through public research and popularized by a government-aided system and the textile industry. In the second decade, between 1962 and 1972, the Cotton Improvement Project was put in place by the public sector all across India, the first private seed industry was established, and cotton promotion by both the state and private sector focused on technology dissemination. During the third decade, private seed companies were allowed to produce hybrid cotton seeds for the first time. Between 1982 and 1992, research on hybrid seeds was enhanced in the private sector to the point that the seed market was split equally between the private and the public sector, and strong collaboration existed among the two.

In the fourth decade, the "technology fatigue" period, cotton yields stagnated at around 300 kilograms of cotton lint per hectare, bollworm infestation was frequent, and pests developed high resistance to pyrethroids. The private sector in collaboration with the public sector worked together to provide alternative pest management strategies: the government introduced integrated pest management (IPM) and promoted mass multiplication of biocontrol agents through private companies. In 2002, Bt cotton was introduced by a private company and tested in the public research system and under government supervision. The government approved biosafety protocols, and Bt seeds were released for commercialization. By 2010, 90% of the cotton area is under Bt varieties. All popular hybrids have been converted into Bt varieties, and yields have doubled. The Indian government introduced the 'Technology Mission on Cotton' for holistic cotton improvement with the objective of enhancing yield, profitability to farmers, and availability of quality cotton to processors. Yields increased by two-thirds, insecticide use declined by two-fifths, and staple length increased substantially over the last decade. Dr. Mayee indicated that through appropriate legislation and enforcement of seed certification standards all across India, cotton seed production by the private sector was strengthened. State governments supported technology dissemination through extension activities. As an example, the Agricultural Technology Management Agency acts as a small farmers' university in 28 states of India. Additionally, the state of Maharashtra introduced a crop pest management and advisory program in 2009. Dr. Mayee concluded that governments must define the rules of the game and let the private sector run their activities within that set of rules. Dr. Mayee's presentation is a statement of the meeting.

The delegate of COLOMBIA requested clarification from both speakers on the role of governments in technology transfer both across countries and within countries to small farmers. Dr. Mayee indicated that the role of the government in India was to provide a complete regulation for biotech products: private companies must first apply for governmental approval to start developing their research; after coming up with a product, a Genetic Engineering Committee evaluates whether the product is suitable for commercialization, and the process takes between 3 and 5 years. Mr. Basterra indicated that a Bio-Security Commission is in charge of evaluating the events submitted for consideration by private companies before approving their commercialization in Argentina. In the past, Argentina had a dispute with a private company about soybean seeds because farmers are allowed by Argentine law to multiply seeds for their own use. However, the government is working now with the private sector to identify the value of the technology, which differs from the technological fee charged by the company

under a dominant market position, in order to help cotton farmers renew the stock of certified seeds at reasonable cost.

The delegate of EGYPT questioned the sustainability of Bt cotton. Dr. Mayee indicated that in India, multiple genes are being incorporated in the seed to avoid developing pest resistance, and there is a strong focus on improving the germplasm for 2020. Mr. Basterra indicated that Bt cotton has been extremely useful for controlling cotton worms (*Alabama Argillacea*) and reducing pesticide use in Argentina. But he highlighted the importance of weighing cost and benefits of the Bt technology before adopting it, and the need for diversification of the production of biotech seeds.

The delegate of TOGO asked the presenters whether cotton research should be placed in the hands of the public or the private sector, since India is an example of a private sector success story over the last decade, and Argentina is an example of a public sector success story. Dr. Mayee stated that both sectors are necessary in developing countries and they must complement each other. In India, the government had to define what areas could be of interest to the private sector and focus on those areas left out by it. Mr. Basterra explained that there are two ways to generate technological change in the small-holder sector. One is through public research focused on solving smallholder problems. The other one is through validation of technologies developed elsewhere for small-scale farming. Usually budget constraints define which path is chosen. South-south cooperation is of utmost importance to develop and adapt new technologies in developing countries.

The delegate of BRAZIL recommended that the Advisory Committee adopt the recommendations from the Standing Committee regarding the establishment of an international center for cotton research.

The delegate of INDIA asked Mr. Basterra about the seed planting rate and whether farmers purchase seeds every year in Argentina. The answer was that the density exceeds 200,000 plants per hectare, and that since illegal imports of BR seeds (Bt + RR) were being used in Argentina, the government made an arrangement with seed companies to partially renew the stock of certified seeds every year. The government provides small-scale farmers with financing to buy certified seeds. In exchange, seed companies reduced the technological fee.

The delegate of PAKISTAN complimented the presenters and asked Dr. Mayee his opinion about whether Pakistan should adopt hybrid or Bt seeds, seeing that yields in India are declining. A second question referred to the percentage of cotton in total textile industrial use in India. Dr. Mayee noted that the decline in yields is only related to drought in many areas, not crop failures or pest resistance. He also indicated that 60% of textile industrial use corresponds to cotton in India, and he does not foresee a change in that share given the recent government decision on minimum requirements to export cotton.

The delegate of KENYA requested further explanation on the type of mechanization that took place in Argentina. Mr. Basterra stated that mechanization consisted of the introduction of a new stripper harvester designed specifically for small and medium scale farms, to be pulled by tractors with 50 to 60 hp. Before that stripper was introduced, cotton area per farm was limited by labor availability to 1.5 - 3 hectares; after its introduction, those same farms expanded to 8 - 15 hectares.

The delegate of BURKINA FASO requested further clarification on the triggers of the substantial increase in yields in Argentina. Mr. Basterra explained that the introduction of new

machinery was the final step of a complete re-engineering of the entire cotton growing process carried on by small-scale farmers. Other major changes concurrent with the new technology were the increase in the plant density (from 3 to 10 plants per linear meter), the reduction of the plant height and the number of cotton bolls, the shortening of the growing cycle, and the concentration of harvesting activities in fewer days. He added that the 78% increase in seed cotton yields was obtained in rainfed conditions.

The delegate of ARGENTINA congratulated the Organizing Committee and the presenters for the exchange of ideas. He said that collaborative work among ICAC members provides for interesting conclusions. The delegate declared that the proposal to create a cotton solution center should be considered seriously, particularly by those countries with no capacity to develop their own cotton technology. He added that this Plenary Meeting is the appropriate venue to conduct such a discussion, and concluded by reminding the Advisory Committee that the Argentine delegation has been requesting an escalation of cooperation efforts across countries for many years.

The delegate of BURKINA FASO asked Dr. Mayee whether after 10 years of Bt cotton in India some resistance is starting to develop. Dr. Mayee answered that India introduced new biotechnology events several times to reduce the likelihood of developing resistance. However, a small area developed resistance to Bt. The government of India is monitoring the situation, and Bollgard II is being introduced.

The CHAIR thanked the ICAC and all members of the Panel for this discussion and adjourned the meeting at 13:50 hrs. She emphasized that the role of the government is to foster development with social inclusion by coordinating activities with the private sector.

Second Open Session

Farmers' Associations, Farmers' Organizations and Cooperatives: What are the Success Factors?

14:15 hr. Monday, September 5, 2011
Mr. Gabriel Gonzales in the Chair

The CHAIR introduced the six speakers and invited Mr. Mario Rodriguez of Colombia to make his presentation. Mr. Rodriguez stated that the cooperative COALCESAR, which he belongs to, was established in the early 1970s. Currently, the coop owns two gins, a rice mill, three drying towers, a cotton classing room and its members are producing about 12,000 tons of seedcotton. The coop also has a school, a hospital and is deeply involved in community affairs. The coop started exporting cotton soon after its establish-

ment and did very well for many years. During the 1990s, due to low international prices, the cooperation faced a crisis that threatened its survival. COALCESAR member did not grow any cotton in 1995/96.

During the late 1990s, the Government of Colombia provided support to the agriculture sector as whole and COALCESAR decided to take advantage of the opportunity for revitalizing cotton production operations. A minimum support price for cotton was also introduced around the same time. COALCESAR established a technology transfer service, secured financing from banks

and implemented integrated crop management approaches. COALCESAR aggressively adopted and adapted new technologies that paid dividends in the form of higher yields and lower costs of production. The coop developed its partnerships in the country and at the international level and developed leadership skills to deal with a crisis, realizing that they were dealing with a volatile market and being prepared to deal with risk management. The support from the government was critical for the revitalization of COALCESAR. Mr. Rodriguez's presentation is a statement of the meeting.

Mr. Andrew Macdonald, representing the Brazilian Association of Cotton Producers (ABRAPA), stated that the Brazilian cotton industry has also gone through crisis. In 1993, Brazil became a cotton importing country, and in 1997 47% of the cotton consumed in the country was imported. Cotton production moved from the north to the central southern states where farms are big and fully mechanized. Currently, there are only 800 cotton growers that produce most of the cotton in the country. ABRAPA has established credibility with state cotton growers associations and has provided an outstanding leadership role with the government for representing cotton issues. ABRAPA has also undertaken a number of international trips to promote Brazilian cotton. The country became an exporting country in 2000. Mr. Macdonald explained in detail the organizational structure of ABRAPA and the role of the Cotton Board.

ABRAPA introduced bale-by-bale HVI classing of all cotton in Brazil. Currently, ABRAPA is setting up a quality control lab in Brasilia for verification of the HVI data from various testing labs. Unity among cotton growers in Brazil is amazing and most growers pay contributions to the Association on a voluntarily basis. ABRAPA collaborates with many other associations in the country that are directly or indirectly related to cotton. Brazilian cotton growers are politically very active and always promote socially and environmentally sustainable cotton production methods. Brazil supports the Better Cotton Initiative (BCI), and a number of farmers are already in compliance with BCI standards. ABRAPA works in conjunction with the government for the ultimate benefit of cotton in the country. Mr. Macdonald's presentation is a statement of the meeting.

Mr. Abelardo Firpo of the Agrarian Union of Avellaneda, Argentina, enumerated the success factors for cooperatives. He stated that joint marketing through coops, qualified technical support, management support to farmers, establishment of links between small producers and banks and regulation of prices and inputs costs are some of the factors that are key to the success of his cooperative. In the advent of a failure of a crop in one year, farmers are comparatively in a better situation to survive shocks. The Agrarian Union of Avellaneda has actively participated in the development of new varieties. The Union has been very mindful of the need to prepare future leaders for continuation of the coop. The primary focus of the Union efforts is to foster growth for the ultimate benefit of producers. Mr. Firpo's presentation is a statement of the meeting.

Mr. Karim Traore of the National Union of Cotton Producers of Burkina Faso (UNPCB) stated that 325,000 families are involved in cotton production in Burkina Faso. Cotton is the 2nd most important source of foreign exchange earning in the country. In 1996, cotton growers started organizing into groups at local, regional

and provincial levels. The National Union of Cotton Producers of Burkina Faso was formed in 1998. All cotton growers in the country are members of a group at local level and ultimately a member of UNPCB. In total, there are 8,000 groups and 27 unions at provincial levels. UNPCB works to promote cotton cultivation and improve cotton growers' living conditions by increasing their income. Mr. Traore explained in detail the structure and functioning of UNPCB. In just 12 years, UNPCB has earned respect and is recognized as a true voice of cotton growers. UNPCB has a strong partnership with the government. The Union has played an important role in commercialization of biotech cotton in the country. The Government of Burkina Faso upholds the Union's position on elimination of subsidies provided by some cotton producing countries. UNPCB has a strong voice in the price setting mechanism and actively participates in the decision-making processes of cotton companies, including Sofitex. UNPCB has a challenge to deal with a large community of illiterate farmers, hurdles to financial management by groups and unions, subsidies by other countries, dealing with poverty and improving services to cotton growers. Mr. Traore's presentation is a statement of the meeting.

Mr. Michael de Groot of the Rabobank Foundation presented the CFC/ICAC 44 project 'Procotton: An integration support program for cotton producer organizations.' The project is sponsored by the ICAC and funded by the Common Fund for Commodities (CFC) and the European Union. Mr. Groot stated that commodity prices are increasing which is in the ultimate interest of producing countries. The current trends will empower producer organizations/coops and will require them to work as business entities. The third important trend that needs to be ingested in the system is the increase in the population reaching nine billion. Population increase will amplify the importance of rural industries.

In the CFC/ICAC 44 project Rabobank Foundation and Solidaridad are strategic partners and initiated the ProCotton program to assist smallholder cotton farmers in developing countries around the pillars of sustainability: people, planet and profit. The Procotton program works on an exit strategy so that the system inducted by Procotton is self-sustainable at the end of the program. Initially the project will be run in Tanzania and Zambia. The project will provide technical assistance, access to finance, capacity building, access to markets, product diversification and moving farmers up the value chain. In Tanzania and Zambia, Procotton will work with Biosustain and the Cotton Association of Zambia, respectively. Later, the Procotton program will be extended to two more countries in Africa and to some countries in Latin America. Mr. De Groot's presentation is a statement of the meeting.

Mr. Adam Kay of Australia spoke on behalf of

Cotton Seed Distributors (CSD). Mr. Kay stated that CSD was formed in 1967 when Delta and Pine Land Company of the USA provided 100% of Australian planting seed. CSD slowly took over the planting seed market in Australia and consequently Deltapine ceased its operations in Australia in 2009. Cotton growers own CSD. According to Mr. Kay, the key factors to the success of CSD are a high emphasis on germplasm and innovation. Giving the example of planting seed production, Mr. Kay stated that the planting seed is delinted and stored in 84 kg bags. The delinted seed is treated based on a farmer's requirement and repacked in 20 kg bags before shipping to the grower. CSD has exclusive rights from the CSIRO to multiply their varieties. CSD is also the only company to have a license from biotechnology developers to commercialize any biotech product. According to Mr. Kay the reasons for success of CSD are grower ownership and control, non-profit organization but run on a commercial pattern, tax-free status, innovation in development and reinvestment of profit in research and development of the seed industry. Mr. Kay's presentation is a statement of the meeting.

The CHAIR emphasized the role of farmers associations, organizations and cooperatives and said that small farmers cannot be left to the mercy of market factors. He observed that government support is critical for the success of any farmers' organization.

When the CHAIR opened the floor for questions, the delegate of ARGENTINA asked if Mr. Groot could indicate the countries where Rabobank plans to extend Procotton in Africa and Latin America. Mr. Groot replied that Rabobank Foundation in collaboration with Solidaridad is currently focused on Tanzania and Zambia and has not yet finalized the countries where Procotton projects will be implemented in the future.

Replying to another question from the delegate of ARGENTINA, Mr. Macdonald said that about 24,000 small growers in the north that went out of cotton production since the 1990s have shifted to other crops. Later, the delegate of BRAZIL added that some growers still produce cotton in the north and they too are involved in producer associations but their share in national production is little.

The delegate of ZAMBIA asked Mr. Kay if CSD was a ginning company. Mr. Kay replied that CSD does not have its own ginnery but instead contracts with producers and ginners to produce and gin cotton for CSD.

Mr. Macdonald responding to a question from the delegate of ZAMBIA stated that government members sit on the Cotton Board but do not dictate their decisions. In fact the Board runs under the auspices of the government but it is a forum for discussion and not a decision making body, although in some cases the government does have the last word. Brazil has a minimum

guaranteed price which is more a reference price and almost always below the market price.

The delegate of EGYPT asked about high yields in Australia, to which Mr. Kay replied that almost half of the improvement has come from variety development and the other half from improvements in agronomic practices such as planting dates, water management and other innovations.

The delegate of TURKEY congratulated the ICAC Secretariat to have such distinguished speakers on the panel. He said that farmer cooperatives could have a small number of members and hundreds of thousands of grow-

ers as members. The delegate asked what is the appropriate size of an association and how small growers could be covered from market risks. Mr. Firpo replied that diversification of activities is a good solution to protect growers from market risks.

The delegate of SOUTH AFRICA asked about the role of government in establishing cooperatives in Colombia and if the membership was affected during the crisis. Mr. Rodriguez replied that the government support to agriculture and fixation of a minimum support price in 2002 really saved COALCESAR from collapse. Mr. Groot once again reiterated the role of governments in encouraging establishment and success

of farmers' cooperatives.

Responding to a question from the delegate of PAKISTAN, Mr. Macdonald observed that growers' desire to work in cooperatives and leadership provided by the association/cooperative are key to success.

The delegate of ARGENTINA commented that the Secretariat must be very careful in inviting speakers in the future. All efforts should be made to avoid speakers that put forward policies and programs based on the desires of certain dominant players.

The CHAIR closed the meeting with thanks to speakers.

Third Open Session

Organic Cotton Production: The Reality of Costs and Benefits

11:00 hr. Tuesday, September 6, 2011

Ing. Agr. Pablo Eugenio Moggio in the Chair

The CHAIR invited Mr. Simon Ferrigno, Advisor, Sustainable & Organic Farm Systems, to discuss the costs and benefits of organic cotton. Mr. Ferrigno indicated that in the late 1980s and early 1990s organic cotton production started as an alternative system for small scale farms with limited abilities to safely manage fertilizer applications. The organic cotton sector has to deal with internal challenges and protect its integrity, since the levels of support and training/investment in farmers are not consistent across the globe, resulting in different premiums (from 0% to 30%), different extension levels (from 1 extension agent for 45 farmers to 1 agent for 2,500 farmers), different yields (from 395 kilograms per hectare in Africa to 1,900 kilograms per hectare in China), and no research. Eleven percent of organic cotton farmers do not get a contract until after the season starts. Mr. Ferrigno indicated that organic cotton production requires long-term collaboration between farmers and lint marketers. The sector needs to develop a responsible code of conduct for all players in the value chain. Smallholders need access to know-how, training, transparent pricing, financing and equity, as well as standards and certification to improve consumer confidence, and farmers need a voice in supply chain management. Mr. Ferrigno's presentation is a statement of the meeting.

The CHAIR thanked Mr. Ferrigno and invited Mr. Jens Soth, Program Coordinator, Helvetas Organic Cotton Center, Switzerland, to make his presentation.

Mr. Soth presented an economic assessment based on ex-post data of the performance of organic cotton in Mali, Kyrgyzstan, Benin and Burkina Faso. Helvetas works with private sector

partners (retailers, traders, and technical textile producers), as well as with public sector partners to stabilize yields in organic cotton farms. Organic cotton yields are, on average, 15% to 60% lower than conventional cotton yields. However, Mr. Soth stressed that input costs are also lower, and therefore organic farmers may actually achieve higher net returns than with conventional production systems. The Helvetas program is specifically designed for poorer farmers with less equipment and less fertile soils. A higher proportion of women are employed in organic cotton farms than in conventional cotton farms. The speaker indicated that since female laborers are in charge of household chores and therefore devote less time to farming, the Helvetas organic program works for them. In Mali, organic cotton yields differ only by 15% from conventional part-time cotton farming yields. In Kyrgyzstan, most organic cotton farmers reported having not experienced yield decreases after the conversion. In Burkina Faso, yields declined for those who converted to organic farming. However, due to special circumstances not scalable to other countries, premiums were sufficiently high to compensate for yield declines, and gross margins increased for organic cotton farmers. The areas for improvement in the Helvetas program, according to Mr. Soth, are handling price volatility, group specific extension, organic fertilization, and pest management. Mr. Soth's presentation is a statement of the meeting.

The CHAIR thanked Mr. Soth and invited Mrs. Jolly Sabune, Managing Director, Cotton Development Organization of Uganda, to make her presentation.

Mrs. Sabune presented the Ugandan experience with organic cotton, first introduced in the country in 1995. Organic cotton area remained stable until 2007/08, when massive promotion of

organic cotton production by multinational ginners enticed farmers to seek price premiums. The new organic cotton areas experienced extremely low yields, ranging from 0 to 50 kilograms of lint per acre despite repeated use of organic pesticides (up to 16 sprays with Oxymatrine & Nimbecidine). The average yield loss in organic cotton areas amounted to 68%. Some farmers applied toxic and un-hygienic fermented concoctions of chilies, cow urine, Marigold leaves, paw paw leaves, Lantana camara, and garlic, with no scientific examination of the contents of the concoctions and the rates of application. Furthermore, after harvesting their organic cotton in 2008, farmers were abandoned by the marketing companies, and the government had to buy their production at prices previously promised by private companies to avoid farmer riots. Organic certifiers in Uganda refused to interface with the government cotton regulatory authority, citing that they were dealing with the private sector and claimed no need to work with the government at the regulatory level. Following the sharp decline in production due to en-mass introduction of organic cotton, the government of Uganda concluded that organic cotton promoted in the manner seen during 2007/08 was entrenching poverty rather than alleviating it and would therefore not be accepted. Prospective organic promoters should operate with the full involvement of the subsector's regulatory authority to protect the interests of small-scale farmers. Organic cotton should only be promoted with organized groups of small-scale farmers purely for local value addition purposes. Cotton is considered one of the most strategic commodities in Uganda for increasing household incomes, creation of employment, industrialization and poverty alleviation. Therefore, according to Mrs. Sabune, anyone who wants to support small-scale farmers in cotton must promote

conventional cotton production. Mrs. Sabune's presentation is a statement of the meeting.

The CHAIR thanked Mrs. Sabune and opened the floor for questions and comments.

The delegate of MALI indicated that his country is highly satisfied with the experience in organic cotton production with Helvetas. However, he observed that organic cotton producers in Mali, Burkina Faso and Senegal have had difficulties in the past in selling and marketing their cotton. He informed that CMDT and Helvetas currently pay the organic premiums, but they are trying to get the government to subsidize the premium.

The delegate of TANZANIA observed that organic cotton producers in his country face lower yields than conventional cotton, and premiums do not compensate for yield losses. He suggested that organic promoters should consider including other crops into an integrated organic approach. Answering a question from the Tanzanian delegate, Mr. Ferrigno indicated that global organic cotton production amounts to less than 200,000 tons and that production was temporarily stagnant due to the global recession and price volatility, but Tanzania is well placed to satisfy increases in organic cotton demand

from China and India.

The delegate of BRAZIL asked the Secretariat to investigate what can be done politically to allow the use of biotech seeds in organic cotton. Mr. Soth added that the EU commission is wary of cases in China, India and other places of emergence of secondary cotton pests, and of other studies that found glyphosate in the metabolism of newborns in Canada from biotech canola. Since cotton is minor in total organic agricultural production and European Union regulations are not cotton-specific, Mr. Soth sees little hope for more flexibility in the use of biotech seeds for organic cotton production in the medium term. Further, Mr. Soth observed that European organic regulations are designed to protect consumers, not to benefit producers. Mr. Ferrigno added that he would consider the use of biotechnology in an organic cotton production program to be an interesting experiment.

The delegate of COLOMBIA congratulated the ICAC for the panel, requested clarification regarding the methods used to collect data on organic cotton yields, and asked that the Secretariat request enhanced efforts by governments to collect more information about their organic

cotton sectors to increase transparency. Mr. Ferrigno indicated that yield data are collected directly from farmers associations at regional levels and then averaged out. Mr. Soth agreed that transparency should be improved, and he is grateful for the work of the ICAC, but pointed out the fact that contract farms will not disclose information.

Mr. Soth, answering a question from the delegate of EGYPT, specified that the EU requires a conversion period from conventional to organic farming of two years, over which farmers obtain lower yields and do not receive the organic premium. In his opinion, organic cotton purchasers should help farmers get through that period.

The delegate of BURKINA FASO observed that organic cotton production increased from 50 tons to 4,000 tons in recent years, and with the increase farmers face difficulties in selling their organic cotton. In particular, when organic cotton cannot be sold before the following crop year, then it is impossible for farmers to get premiums from the missed year.

The CHAIR thanked the presenters and the public for the discussion and adjourned the meeting at 13:00 hrs.

Fourth Open Session

Managing the Impacts of Volatile Cotton Prices

13:45 hr. Tuesday, September 6, 2011
Dr. Luciano Di Tella in the Chair

The CHAIR invited the Secretariat to present a report on price volatility.

Dr. Alejandro Plastina said that in 2010/11, not only did prices reach unprecedented levels, but also there was also unprecedented volatility. He noted that, there has not been a strong correlation between the level of prices and their volatility historically. Furthermore, there has been no clear trend increase in the volatility of cotton prices, either in nominal terms or when deflated, over the period from 1980-2009. He noted that while cotton prices topped the list of most volatile commodities in 2010, the volatility of cotton prices was similar to the price volatility of other raw agricultural products, food, and metals, but lower than the price volatility of energy and beverages over the period 1980-2009. Mr. Plastina reported that the fundamental factors behind the record high volatility in 2010/11 included strong demand and limited supply during the first 8 months of the season, followed by weak demand and increased supply over the last 4 months of the season. In addition to these fundamental factors, unexpected actions by several major cotton players, such as limits on exports, actions of state owned enterprises and defaults on contracts, exacerbated price volatility in 2010/11. He said that

the record level and volatility of cotton prices in 2010/11 accelerated the long-term decline in the market share of cotton from 35.5% in 2009 to 33.5% in 2010. Stronger promotional efforts at the retail level are needed to sustain demand for cotton.

Ms. Armelle Gruère, Statistician of the ICAC, presented the global outlook on cotton supply and use for 2011/12. She noted that world cotton production was expected to continue to rise in 2011/12 for the second consecutive season to 26.9 million tons (+8%). Cotton plantings expanded in 2011/12 as a result of high cotton prices paid to farmers in 2010/11. She added that after a drop in 2010/11 caused by extremely high cotton prices, world cotton mill use was projected to resume slow growth in 2011/12 to 24.7 million tons (+1.5%). Cotton mill use will be facilitated by increased availability of raw material but the possibility of a double-dip global economic recession could reduce these expectations. Global cotton imports are projected to rebound to 8.1 million tons in 2011/12, fueled by larger crops, higher consumption, and the rebuilding of the Chinese government reserve. As a result of the expected surplus of 2.2 million tons, global world ending stocks could rebound by 24% to 11.2 million tons in 2011/12. The projected rebound in the stocks-to-mill use ratio outside of China may result in a decline in the

season-average Cotlook A Index in 2011/12. However, it is likely that the season-average A Index will remain above the 10-year average of 60 cents/lb (2000/01 to 2009/10). Finally, Ms. Gruère concluded that cotton price volatility could decline in 2011/12 due to the expected recovery in global cotton stocks, but volatility might still exceed historical averages.

Mr. Andrei Guitchounts, Economist for the Secretariat, described price risks faced by the cotton industry caused by market volatility. He noted that trading businesses face risks both during price increases and price declines, and he said that while global supply and demand creates volatility, speculation increases it. He observed that changes in international cotton prices result in changes in domestic prices, and higher cotton prices require traders to access larger amounts of trade finance. Mr. Guitchounts noted that in order to deal with volatility and the associated risks, it is necessary to move from acknowledging risk to managing it. He said that governments have an important role in addressing price risks by assuring transparency in statistics on cotton supply, use and trade; by providing stable policy environments; by working to conclude the Doha Round and thus strengthening trade rules; and by enabling access to hedging mechanisms for the private sector. He indicated that all traders have the opportunity to manage price risk, but

management requires disciplined analyses and appropriate strategy selection.

Mr. Guitchounts said that the goal of risk management is to reduce trader's exposure to volatile prices through physical and/or financial risk management strategies. Physical strategies involve back-to-back trading, forward fixed price contracts, minimum price forward contracts, contracts in which prices will be fixed prior to delivery, and long-term contracts. These strategies can be effective, and most traders will find managing risks with physicals to be the most attractive way of managing risk, because it is already their core business activity. He observed that financial strategies involve the use of financial markets to hedge the physical exposure to price risk, such as futures and options on futures contracts. He indicated that the Intercontinental Exchange (ICE), NY, is the only exchange that can be used effectively for hedging physical positions. However, when using the New York contract, basis risk, the difference between futures prices and cash prices, remains. He noted that potential changes in the basis are a major limitation to using futures for hedging non-U.S. cottons. Mr. Guitchounts said that risk management could involve the use of both physical contracts and financial instruments, and hedging is not a guarantee of profits, but is a way to minimize risk caused by price volatility. Their presentation is a statement of the meeting.

The CHAIR invited Mr. Raul Ochoa, of the Universidad Nacional Tres de Febrero. Mr. Ochoa observed that we now live in changed world with record prices for commodities. He said that worldwide, the urban population exceeds the rural population; food security is becoming the most important issue as well as migration, land and water resources. He noted, that changes in the world economy are being driven by the developing economies of emerging markets. He noted that countries like China are becoming the

largest manufacturers, and domestic demand for goods is growing rapidly in these markets. Emerging economies and the growing income of the middle class are behind the growing demand for manufactured goods and commodities in countries like Brazil, Mexico and Russia. He noted that high volatility is caused by uncertainty. Mr. Ochoa's presentation is a statement of the meeting.

The CHAIR invited Mr. Adrian Nador, Desk G20, Ministry of Foreign Affairs of Argentina, to report on the response of the G-20 to price volatility in commodity markets. Mr. Nador explained that two major structural changes occurred in commodity markets that lead to "excessive" price volatility: demand is growing faster than supply, and commodities became an asset class for financial investment. Facilitating supply growth could mitigate the effects of the rapid growth in demand. Mr. Nador observed that the second structural change has short term destabilizing effects on commodity prices. The G-20 raised the visibility of agriculture and food insecurity problems, focusing on volatility rather than on price trends, and developing the capacity and cooperation links to foster development among small-scale farmers. As examples of the work of the G-20, Mr. Nador cited the study group created to analyze the volatility of the energy sector in 2010. That group is focusing on food insecurity and agriculture in 2011. Another example is the Agriculture Market Information System (AMIS) instituted by the G-20 to collect greater market information on global commodity stocks and production. A third example is the creation of a rapid response forum in the United Nations Food and Agriculture Organization (FAO) to increase cooperation and coordination among countries in the event of a food crisis. Mr. Nador indicated that the Ministers of Finance of the G-20 are working on increasing the transparency of data reporting in commodity markets. Mr. Nador's presentation is a statement

of the meeting.

The CHAIR thanked the Secretariat, Mr. Ochoa and Mr. Nador for their presentations, and he asked if there were questions or comments.

The delegate of PERU requested further information from the Secretariat about the outlook for fine and extra fine cotton. Mrs. Gruère indicated that the Secretariat publishes a bi-monthly report on extra-fine cotton, and that the latest report will be sent to all delegates.

The delegate of INDIA complimented the Secretariat for its presentation about price volatility and the tools to manage volatility. He requested that transaction risks and credit risks be added to the analysis, and he requested that the Secretariat published a booklet to be distributed among member countries.

The delegate of KENYA asked for further clarification on why cotton consumption is not increasing and polyester consumption is not declining after the substantial decline in cotton prices observed after March 2011. Dr. Plastina indicated that despite the decline in cotton prices in recent months, cotton prices remain significantly higher than polyester prices.

The delegate of TURKEY requested that the Secretariat publish a new study similar to the one published in 2008 about the effects of speculation in cotton prices with information updated through 2010/11. The delegate asked the Secretariat to focus on the effects of speculation on the decline of cotton prices that had begun in March 2011.

The delegate of INDIA provided a statement to the Secretariat for distribution with the documents of the meeting on the subject of *Managing Impacts of Volatile Cotton Prices*. His discourse is a statement of the meeting.

The CHAIR adjourned the meeting at 15:40 hrs.

Fifth Open Session

Development of the Argentine Textile Industry: Policies for Growth

16:20 hr. Tuesday, September 6, 2011
H.E. Jorge M. Capitanich in the Chair

The CHAIR welcomed participants to the 5th Open Session. He drew attention to the growth in Argentine textile production since 2000 and said that the growth was in association with the national macroeconomic model that had been developed by the national government. He said that Argentina had a strategy of strengthening domestic demand for goods produced in Argentina, and that economic growth of 7.6% since 2003 indicated the success of the strategy. He said that sustainability of the textile value

chain was accomplished through three concepts: collaboration, maintenance of cotton area and incentives for textile production. Collaboration involved the development of a joint strategy involving the national and provincial governments, in collaboration with both public and private institutions to eliminate insects and weeds and develop new production technologies. Area devoted to cotton was being maintained through the development of new agronomic protocols that stimulate production. Incentives for production of denim and other textiles are resulting in job creation and value added production.

The CHAIR invited Lic. Eduardo Bianchi, Secretary of Industry, Argentina to give his presentation. Mr. Bianchi observed that policies of trade opening during the 1990s had not resulted in industrial growth with social inclusion. He said that Argentina had developed policies to increase incomes by providing incentives to strategic sectors, protecting workers in national industries, encouraging import substitution and increasing exports, by negotiating regional trade agreements within MERCOSUR and between MERCOSUR and the EU, and by providing a line of credit of Argentine \$113 million to the

textile industry. The objectives of these policies are to stimulate textile industry growth of 10% per year to 2020, to add 360,000 jobs in the textile and clothing sectors and to increase exports while limiting imports and thus achieving balance in trade in textiles and clothing. Mr. Biachi's presentation is a statement of the meeting.

The CHAIR thanked Lic Bianchi for his presentation and invited Ing. Patricia Marino, National Institute for Industrial Technology (INTI) to give her presentation. Ms. Marino described the broad scope of industrial research conducted under the auspices of INTI, in industries ranging from aeronautics to energy to textiles. The mission of INTI related to textiles is to support the competitiveness of the industry by developing new technologies. INTI accomplishes this mission through analysis, providing technical assistance, facilitation of technology adoption, capacity building, assistance with marketing, research and development and investment, dissemination of results and by promoting sustainable production. She described several specific activities of INTI related to textiles, including a Clean Clothes Campaign, a sustainable cotton program called PROCALGODON, research programs, including the use of nanotechnology, and fashion design. Ms. Marino's presentation is a statement of the meeting.

The CHAIR thanked Ms. Marino for her presentation and invited Mr. Pedro Bergaglio, President of Fundación Pro-Tejer, Argentina to speak. Mr. Bergaglio is a knitter and owns several sweater factories. He described the difficulties that had befallen all Argentine industries during the 1990s and explained how his company had recovered during the 2000s. He lauded the national government for its policies to discourage imports and encourage exports, to create strong domestic demand growth and increased industrialization.

The CHAIR thanked Mr. Bergaglio for his remarks, and he asked Ing. Carlos Basaldua, President of FITA and Executive Director of Alpargatas Textil S.A., the largest cotton spinner in Argentina, to give his presentation. Mr. Basaldua described recent developments in the world cotton situation, including growth in cotton production in Argentina. He reported that textile production and consumption in Argentina had risen during the past ten years, and that this growth coincided with increases in capacity utilization in textile plants and expansion in textile capacity. He noted that textile industry employment had risen by more than 25,000 since 2002. He said that imported products still accounted for 44% of apparent consumption of textile fibers at the retail level in 2010 and that the Argentine industry hopes to reduce this percentage in the

future. Mr. Basaldua's presentation is a statement of the meeting.

The CHAIR thanked Mr. Basaldua for his remarks. The CHAIR invited delegates to ask questions or make comments.

In response to questions asked by the delegate of TANZANIA, Mr. Bianchi and Mr. Basaldua reported that textile machinery used in Argentina is imported and Argentina does not manufacture and export textile machinery. He added that investment was coming from both domestic and non-domestic sources.

The delegate of INDIA asked whether INTI is working on value addition with cotton plant by-products, such as cotton stalks, and Ms. Marino answered that INTI is not developing such technologies at this time. The delegate of India also asked if INTI is developing machinery to extract fibers from banana stalks, and Ms. Marino indicated that work on banana fibers had indeed been started within the last year, but no results had been developed yet. She noted that INTI was collaborating with research institutes in Colombia and Brazil on the banana work.

Seeing no additional comments, the CHAIR thanked the panel members for their presentations and comments. The meeting was adjourned at 17:50 hrs.

Sixth Open Session / Technical Seminar

Meeting of the Committee on Cotton Production Research

Technological Innovations for Sustainable Development of the Cotton Value Chain

9:00 hr. Thursday, September 8, 2011
Ing. Luis Basterra in the Chair

The Committee on Cotton Production Research of the ICAC organized the 6th Open Session/ Technical Seminar on the topic 'Technological Innovations for Sustainable Development of the Cotton Value Chain.' Five papers were presented on the enhancement of sustainability in the value chain. These papers are published in a separate document called *Technical Seminar Papers*.

This session includes also a special presentation from the ICAC Researcher of the Year 2011 on the future of cotton research with particular reference to future uses of biotechnology.

Brazil has emerged from being one of the lowest yielding countries in the world until 1997/98 to one of the highest yielding countries now. The innovations that have transformed cotton production are spread across a wide spectrum, including research accomplishments, organization of farmers, availability of resources, shifting production to more suitable areas and incorporation of necessary changes to implement a modern

production system. The development of varieties resistant to the blue disease not only minimized the need for sprays against the disease vector but also reduced yield losses. The boll weevil, which is notorious for creating havoc in the Americas, has been managed so that the problem does not explode. Sanitary measures were undertaken to contain the pest in the affected areas. Soil fertility managed programs were undertaken so that the plants get the best nourishment for the highest yield. The Brazilian approach paid high dividends, and the average yield in Brazil in 2011/12 was 1,480 kg/ha lint as against 470 kg/ha in 1997/98.

Cotton production in Mozambique has been going down for the last few years. The primary reasons for the decline in area planted to cotton are competitiveness of cotton against other crops, poor technology development, lack of efficient technology transfer to farmers and weak coordination among stakeholders. The cotton sector in Mozambique is organized through the Mozambique Institute for Cotton, the Cotton Association of Mozambique (ginners), and the

National Forum for Cotton Producers, and the industry has a very effective system of communications with the Mozambique government. Realizing the need for vast improvement, the Government of Mozambique approved the 'Cotton Value Chain Revitalization Plan' in April 2011. Under the Plan, the Government will strengthen research, produce and provide certified planting seed through a public-private partnership, improve the technology dissemination system, introduce matching grant and venture capital initiatives. The Government will target selected districts to promote cotton and establish model farms to demonstrate judicious use of inputs. Mozambique also plans to adopt bale-bale 100% HVI classing of cotton produced in the country.

Turkey is expected to emerge as the fourth highest yielding country in the world in 2011/12. The vibrant cotton sector in Turkey has benefitted from developments in research and development. Verticillium wilt resistant varieties were developed to escape from the disease losses sometimes as high as 16-38% in the Aegean

region. Certified planting seed that is delinted and treated with insecticides is used on 100% of the area in the country, resulting in a 50% reduction in the seeding rate and 17% lower insecticide use. The variety development process has accelerated from 1995 on with the active participation of the private sector. Sixty-six varieties were released in the 2000s, compared to 23 in the 1990s and only six in the 1980s. Research on environmental stress, especially salt and drought tolerance, has received high attention for the last few years. Soil testing is becoming a routine that helps to conserve on fertilizer use. It is estimated that about $\frac{3}{4}$ of total area is now picked by machines. Lower picking costs are driving growers to adopt machine picking. Cotton area is going to get another boost with the completion of a mega irrigation project in 2013.

Argentina is in the forefront in developing and embracing new technologies. It is estimated that most area is now planted to biotech varieties. The rate of adoption has been high, although the cost of the technology has been of concern to cotton growers. Biotech cotton has improved pest control (weeds and insects) in addition to facilitating tillage operations. Narrow row planting, with a plant population of as much as 200,000 plants/ha, has vigorously progressed in the last few years, occupying almost $\frac{3}{4}$ of the area in 2010/11. The row-to-row distance may vary from 0.32-0.52 m among growers and states. On average, farmers harvest 20-30% higher yields and the crop matures in 121-126 days. Early clearing of fields allows for double cropping. Argentina has developed a picking machine that is used on over 60% of the area.

The machine is also used in other countries in the region. The machine has been adjusted to pick cotton planted in narrow rows. In the field of biotechnology, public and private sector researchers are jointly working using various options to induce resistance to the boll weevil, a serious threat to cotton production in Argentina. The National Institute of Agricultural Technology (INTA) has identified virus mutations that can induce immunity to the blue disease. Projects are about to begin to induce tolerance to drought and salinity.

Dr. Sukumar Saha, ICAC Researcher of the Year 2011, from the USDA, presented a detailed report on the use of biotechnology in sustainable development of cotton. He focused on the use of transgenic transformation, marker assisted selection (MAS) and the future of cotton genome sequencing. While cotton producing countries that adopted insect and herbicide tolerant biotech cotton have benefitted to a great extent, RNA interference (RNAi) carries enormous potential for a target transcript/genotype. RNAi is an emerging technique based on post-transcriptional gene silencing, induced by double stranded DNA. Selective inactivation of specific genes using encoded DNA through RNAi technology has a great potential due to its high specificity, stability and efficacy. The same technique has been employed to develop extra low gossypol seed, leaving gossypols in non-seed plant parts. RNAi has been used to develop resistance to nematodes. However, identification of genes that can be effective through a suitable delivery system is still a challenge for researchers. Marker assisted selection (MAS) will replace the

long and unreliable phenotypic based selection system, currently employed by breeders, with a gel-based DNA marker in the lab. Many research teams are vigorously working to establish informative DNA markers, which is a key to marker assisted selection. Studies are also underway to develop molecular methods of association mapping. Genome sequencing will unveil the relationship between functional genome and phenotypic performance. It is very important to have a comprehensive strategy for complete sequencing of all genomes and tetraploid derives used in commercial production. Technological, environmental and economic impacts of new technologies require establishment of an international cotton research center. Dr. Saha opined that it is a high time to establish an international cotton research center. Delegates of Colombia and India expressed their strong support for the proposal. Dr. Saha also proposed to have a 2-3 page summary work plan for an international cotton research center agreed among researchers gathered at the World Cotton Research Conference-5.

Dr. C. D. Mayee, Chairman of the National Organizing Committee of the World Cotton Research Conference-5 briefed the meeting on preparations for the WCRC and encouraged researchers to attend the Conference to be held in Mumbai, India from November 7-11, 2011.

The Committee on Cotton Production Research of the ICAC decided to hold the 2012 Technical Seminar on the topic 'Intellectual Property Rights and the Role of Private Breeders.'

Meeting of the Steering Committee

16:00 hr. Thursday, September 8, 2011
Mr. Patrick Packnett in the Chair

The CHAIR referred to Working Paper I, Election of Standing Committee Officers. He noted that Ms. Lily Munanka of Tanzania, Mr. François Schmidt of Switzerland and Dr. Chris Parker of Australia had been selected by a Nominating Committee and endorsed by the Standing Committee in Washington to serve as Chair, First Vice Chair and Second Vice Chair of the Standing Committee, respectively. He asked if there were any objections to the nominations.

The delegates of ARGENTINA and INDIA congratulated the nominees and supported their election. The delegate of INDIA encouraged the Standing Committee officers to adequately represent the interests of all regions when guiding the work of the Standing Committee.

The CHAIR found that the nominations were approved.

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

The CHAIR introduced Working Paper II, Renewal of the Contract of the Executive Director, which would extend the contract of the executive director for two years, until the end of December 2013, at the level of UN grade D-1, step IX.

In response to a question from the delegate of INDIA, the executive director said that membership development, supporting the work of the Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP), and supporting technology development were his priorities during the next two years.

The delegate of INDIA said that he supported the request for a contract extension, and he noted that it was common in international organizations for executive heads to receive three-year contracts, and he asked why the executive director had not asked for a three-year extension. The executive director said that the length of service of executive directors in the ICAC was not specified in the Rules and Regulations. He explained that during his tenure he had repeatedly asked for two-year extensions in sequence with the schedule of two-year intervals between step-increases in the UN system for employees at the D-1 level.

The delegate of ARGENTINA said he supported the request by the executive director for a contract extension. Noting that the executive director had indicated that he intends to depart from the Secretariat at the end of 2013, the delegate asked what provisions were in place to ensure a smooth succession to the next executive director of the ICAC. The executive director said that he and the Chair of the Standing Committee had mapped out a schedule of activities beginning with the development of a job description and

terms of reference for the new executive director, advertising the position, receiving applications, interviews and selection, and hiring of a new executive director during 2012 and 2013. He said it would be the objective of the Standing Committee to ensure the selection of a successor in time to attend the 72nd Plenary Meeting in Colombia in 2013.

The delegates of PAKISTAN, UGANDA, EGYPT, MALI, KENYA, INDIA, TANZANIA, TURKEY, ZAMBIA, IRAN, and other countries indicated that they supported the request for a two-year contract extension. Accordingly, the CHAIR found that the request was approved, and he thanked the executive director for his work in leading the ICAC.

Working Paper II "*Renewal of the Contract of the Executive Director*" is attached.

The CHAIR noted that the Government of Colombia had extended an invitation to the ICAC to hold the 72nd Plenary Meeting in Colombia in 2013. He asked if there were objections, and seeing none found that the invitation was officially accepted. He thanked Colombia for its support for the ICAC.

The CHAIR noted that the Drafting Group had completed its work on the Draft Statement of the 70th Plenary Meeting and asked if delegates were prepared to officially approve the Statement.

The delegate of INDIA noted that the world economic situation and the outlook for cotton consumption was much more serious than indicated in the first paragraph of the draft statement. He suggested stronger language to reflect the dire outlook for cotton consumption in 2011/12.

Other delegates, including the USA, PAKISTAN, ARGENTINA, and POLAND, indicated that they supported accepting the Draft Statement of the plenary meeting as completed by the Drafting Group.

Subsequently, the delegate of INDIA graciously withdrew his proposal.

Seeing no other suggestions or comments on the draft statement, the CHAIR found that the Statement of the 70th Plenary Meeting of the ICAC was approved as drafted by the Drafting Committee.

The CHAIR invited the delegate of INDIA to elaborate on his concerns about financial support for the ICAC.

The delegate of INDIA said that there had been zero increase in the budget of the Secretariat for the current fiscal year and that increases in recent years had been less than inflation. He said that resources provided to the Secretariat were not sufficient for the "immense" work it completed. He suggested that a small group of countries be formed to develop a new model of financial

support for the Secretariat.

The delegate of the USA, who also serves as Chair of the Subcommittee on Budget in Washington, observed that zero growth in the budget of the Secretariat for the current year reflects current national budget situations among member countries. He said that the ICAC does not have a budget crisis, that the budget process used by the Standing Committee is working and that governments have shown strong support for the Secretariat over the years.

In response to questions from the delegate of ARGENTINA, the executive director said that his original budget request had been pared by about 2% for the current year, or approximately \$35,000. He said most of the cuts had come from the budgets for salaries, travel and training.

The delegate of INDIA said that the allocation for the ICAC in his ministry had been kept at a very small level for several years, even though the quantum of work completed by the Secretariat was enormous. He appreciated the work of the Subcommittee on Budget in Washington but repeated that he felt that a new model needs to be developed. The delegate noted that the United States is a leading country in support of multilateral cooperation and the development of strong international institutions and democracy. He urged the Chair of the Standing Committee to demonstrate leadership in support of the ICAC and to find a better solution for the support of the ICAC.

Delegates of ARGENTINA, MALI and INDIA urged the Standing Committee to develop a method of supporting the work of the Secretariat.

The CHAIR, on behalf of the Government of the United States, appreciated the words of the delegate of India. The Chair gave assurance that the message from delegates would be conveyed to the Standing Committee and that options would be considered to ensure a sustainable funding model for the ICAC. The Chair encouraged countries to ensure that their delegates to the Standing Committee participate in the work of the Subcommittee on Budget.

The CHAIR invited the delegate of India to elaborate on his suggestion for a mid-season meeting of the ICAC in Washington in April 2012.

The delegate of INDIA said that the gap between meetings of the ICAC was too great, given the importance of developments in the world cotton industry during the current situation. He said that a two-day meeting in Washington in April 2012 could help bring clarity to plans, developments and programs for cotton and cotton textiles envisioned by countries.

The delegate of AUSTRALIA asked what the

agenda and purpose of the mid-year meeting would be.

The delegate of ARGENTINA said that he supports the concept but was concerned about travel and other expenses.

The delegate of IRAN offered support for the suggestion of India.

The delegate of TURKEY expressed reservations about the need for such a meeting and costs associated with travel. The delegate observed that there was not an emergency in the world cotton industry requiring immediate consultations and said that it might be difficult for members to attend.

The delegate of MALI expressed support for a mid-year meeting.

The executive director requested the opportunity to comment, which was granted by the CHAIR.

The executive director said that he was excited by the proposal from India. He observed that such a meeting could strengthen links between heads of delegations in capitals and Standing Committee delegates, and that it could enhance the role of the ICAC as a forum for discussion of cotton matters. He suggested that delegates allow him several weeks after the plenary meeting to plan a proposed agenda, timetable and venue for a potential mid-year meeting in Washington. He said that he would distribute the proposal for consideration by countries, and if the proposal was deemed worthwhile, a mid-year meeting could be scheduled.

Delegates of PAKISTAN, INDIA, TURKEY, AUSTRALIA, and ARGENTINA, either supported or reluctantly supported the suggestion by the executive director. Delegates questioned the need for such a meeting and reiterated concerns about costs, but they agreed to allow the executive director the opportunity to offer a proposed agenda for a mid-year meeting in Washington for consideration.

The CHAIR found there was a consensus to accept the proposal by the executive director.

The intervention from India, regarding Working Paper I, Working Paper II, the Statement of the Plenary Meeting, the financial sustainability of the ICAC and the proposal for a spring meeting of the ICAC is a statement of the meeting.

Seeing no other business, the CHAIR adjourned the meeting at 19:10 hrs.

ATTACHMENTS

Working Paper I

Election of Standing Committee Officers

Recommendation from the Standing Committee

A nominating committee conducted two meetings at the Embassy of Germany on April 28, 2011 and May 9, 2011 to propose a slate of officers for the Standing Committee for the coming year. Delegates of Argentina, Australia, China (Taiwan), Egypt, Germany, Greece, Nigeria, Spain and the USA participated in the first meeting. Delegates of Australia, China (Taiwan), Egypt, Germany and Greece participated in the second meeting. The executive director attended both meetings, and Ms. Antonette Debusse, delegate of Germany, was asked to serve as Chair of the Nominating Committee.

The Rules and Regulations specify that when practicable, the first vice chair will be nominated to succeed the outgoing chair and the second vice chair nominated to succeed the first vice chair. The current first vice chair of the Standing Committee, Mrs. Lily Munanka, Head of Chancery, Embassy of Tanzania, will be able to serve as an officer next year. The current second vice chair, Mr. François Schmidt, Head of Commercial Service, Swiss Business Hub, Embassy of Switzerland, will also be able to serve as an officer during 2011-12. Accordingly, there was a consensus to nominate Mrs. Munanka to serve as Chair and Mr. Schmidt to serve 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 Dr. Christopher Parker, Minister-Counselor (Agriculture), Embassy of Australia should be nominated to serve as second vice chair. Dr. Parker arrived in Washington in July 2011 and became the delegate of Australia to the Standing Committee. Members of the Nominating Committee noted that each delegate from Australia over many years had always taken a strong interest in the work of the ICAC, and that by nominating officers early in their assignments to embassies in Washington there would be a greater chance that succession from second vice chair-to-first vice chair-to-chair could be completed. It was noted

that the proposed slate of officers represented a good geographic balance of member countries and included both producing and consuming countries.

The nominations received provisional approval from the Standing Committee at the 511th meeting on May 26, 2011.

Accordingly, the Standing Committee proposes the following slate of officers to the plenary meeting for the period from the end of the 70th Plenary Meeting in 2011 to the end of the 71st Plenary Meeting in 2012:

Mrs. Lily Munanka, Tanzania, for Chair,

Mr. François Schmidt, Switzerland, for First Vice Chair.

Dr. Christopher Parker, Australia, for Second Vice Chair

Working Paper II

Renewal of the Contract of the Executive Director

Recommendation from the Standing Committee

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

The current contract for the executive director expires December 31, 2011.

In April 2011, the executive director asked the Standing Committee to approve a two-year extension of his current contract at the level of UN grade D1-Step IX. The executive director is currently paid at the level of UN grade D1-Step VIII, but if he were employed in the UN system he would be eligible for a promotion to Step IX as of January 1, 2012 based on time-in-service.

At its 510th Meeting in April 2011, the Standing Committee agreed to recommend to the Plenary Meeting that the contract of the executive director be extended for two years until December 31, 2013 at the level of UN grade D-1, Step IX.

However, the salary received by the executive director will be subject to the availability of resources, and in the budget approved by the Standing Committee for the current fiscal year, the executive director will not receive an increase in salary to Step IX effective January 2012.

Accordingly, the Standing Committee recommends that the Advisory Committee approve a two-year extension of the contract for the executive director at the level of UN grade D1 Step IX for the period beginning January 1, 2012 and ending December 31, 2013, with the understanding that the salary received by the executive director will remain at the level of UN grade D1 Step VIII pending the availability of budget resources.

Working Paper III

Topic of The 2012 Technical Seminar

Proposals from the Secretariat to the Committee on Cotton Production Research

The following themes are suggested as possible topics for the 2012 Technical Seminar:

Intellectual Property Rights and Role of Private Breeders

Cotton breeding and planting seed production shifted to the private sector in the USA long before the adoption of biotech cotton and the same process occurred in India prior to the adoption of biotech cotton in 2002. In Pakistan, private seed companies are now aggressively competing against public sector breeders who have monopolized variety development until now. Private sector varieties have already been officially approved and are expected to quickly take over the planting seed market. More countries are on the same path and others will ultimately come to the conclusion that the private

sector can develop new varieties and produce planting seed for farmers. These changes will allow public breeders to focus on genetic work and the development of germplasm.

However, countries that have commercialized biotech cotton require breeders to test their breeding lines with biotech genes already inserted in the cultivars. But, many companies particularly smaller ones do not have rights to insert biotech genes at the early stages. Public sector breeders lose their rights to the genotypes as soon as a single biotech gene is inserted in the new line. The question of who should own a biotech variety, the biotech company who owns only two or three genes or the breeder who spent 15 years to develop a variety, is the intellectual property rights issue limiting the role of private breeders and related issues could be discussed during the seminar.

Modern Insights into Soil Fertility Maintenance

Sustainable agriculture and various specialty cottons that are popular (e.g. organic cotton, zero tillage, better cotton, cotton made in Africa, etc.) place high emphasis on soil fertility. Fertilizer is applied to cotton to meet plant nutrient needs. The inundation of soil with high doses of fertilizers is not desirable, but neither should plants starve due to a short supply of nutrients. The use of organic fertilizer is disappearing, and this has a significant impact on cotton and other crops. Cotton yields can be pushed up by timely and accurate application of nutrients to meet plant needs. Are there options other than farm yard manure to improve soil texture and organic matter content in soil? How best can

plant needs be met, how can losses in the form of evaporation and leaching be minimized, are there modern approaches to bring this together and still fit into the tough working schedule of cotton production (e.g. mycorrhiza research, application of green-manures, bio fertilizer and other organic fertilizers, especially in areas where biomass is scarce, modern insights into N and P availability, etc.). This could be a topic for the 2012 Technical Seminar.

Overcoming the Period of no Growth in Yield

Cotton yields increase as a result of technology development and adoption. Once the technological package is optimally utilized, cotton yields tend to stagnate until a new technological innovation is adopted. The same process has been repeated many times in the history of cotton. Cotton yields ceased to grow during most of the 1990s. However, biotech cotton started showing its impact and yields started to grow from 2000/01. Major cotton producing countries have reached their peak in biotech cotton area, and yields have once again stagnated around the world. Statistics show that the highest world average yield was 793 kg/ha in 2007/08. The world average yield has fluctuated but not increased in the last three years. The ICAC forecast shows lower yields for the next few years. Cotton yields in the world have entered a period of slow growth if not a period of no growth. How long this period will last is not known. Why there is slow/no growth in yields and what should be done to improve yields could be a topic for the 2012 Technical Seminar.

Closing Session

10:00 hr. Friday, September 9, 2011
Mr. Juan Carlos Núñez in the Chair

The CHAIR noted that the Drafting Committee had developed the Statement of the 70th Plenary Meeting on Thursday, September 8, 2011 using English as the working language. Further, the Statement had been approved by the Steering Committee, also on the basis of the text in English. To ensure a full understanding by all participants, the Chair asked the Secretary General to read the Statement of the 70th Plenary Meeting so that all delegates could benefit from the simultaneous translation. The Secretary General read the Statement.

The CHAIR thanked the Secretary General and invited the representative of Switzerland to present its invitation to host the 71st Plenary Meeting.

H.E. Ambassador Johannes Matyassy, Ambassador of Switzerland to Argentina, said that it was a great honor and privilege to invite the international Cotton Advisory Committee to meet in the city of Interlaken during 8 to 11 October 2012. The Ambassador thanked and congratulated the Government of the Republic of Argentina for the brilliant organization of the 70th Plenary Meeting, and he thanked Argentina for its generosity and hospitality.

The Ambassador noted that Switzerland has a long tradition of cotton trade, and that the textile industry had been very relevant historically in the industrial development of Switzerland. Based on ample supply of hydropower, Switzerland was one of the key regions to develop a textile industry. Switzerland remains a leader in the design and manufacture of cutting-edge textile machinery and testing technologies. In addition, Switzerland places a high priority on

sustainability in the textile industry and in the cotton sector. Swiss supermarket chains and textile companies are pioneers in the development of value chains from organic, fair trade or BCI cotton. In Switzerland, an estimated 5% of cotton consumption at the retail level is organic. The Ambassador said that the 2012 ICAC meeting in Switzerland would reinforce the message that business and sustainability contain excellent synergies. He added that the 2012 ICAC meeting will showcase sustainability in all three dimensions, economic, social and environmental, in the cotton value chain.

The CHAIR thanked Ambassador Matyassy for his invitation to the 71st Plenary Meeting. The Ambassador's discourse is a statement of the meeting.

The CHAIR invited the delegate of the United States, host of the 69th Plenary Meeting, to offer

closing comments on behalf of all delegates.

The delegate of the UNITED STATES said that it was a great honor to deliver closing comments to the 70th Plenary Meeting. The delegate recalled that the theme of the 69th Plenary Meeting had emphasized global unity, and he noted the continuity with the theme of the 70th Plenary Meeting, with an emphasis on the roles of the public and private sectors in the cotton value chain. The delegate said that it had been an honor for the Plenary Meeting to hear from Minister of Agriculture, Julián Domínguez and Minister of Industry, Debora Giorgi, who had briefed the Committee on efforts in Argentina to stimulate cotton and textile production. The delegate of the USA noted that the subject of price volatility had been a source of great concern during both the 69th and 70th plenary meetings. Assuring transparency by improving the collection and reporting of statistics on cotton supply and demand, providing stable policy environments and working to conclude the Doha Round of trade talks could contribute to reduce volatility. The private sector could make better use of price risk management tools. The delegate said that the theme and agenda chosen by Argentina for the 70th Plenary Meeting had afforded the opportunity to deliberate on key issues and that all countries had had the opportunity to have their voices heard. In addition, he said that the policy deliberations had occurred in an environment of hospitality and comfort, and he thanked Argentina for going the “extra kilometer” to ensure a successful meeting. He concluded by thanking and congratulating the Government of the Republic of Argentina and the Organizing Committee for the efforts in making the meeting a success. His discourse is a statement of the meeting.

The CHAIR expressed his gratitude for the kind words expressed by the delegate of the United States. He said that Argentina opens its hands and its heart to all people of good will, and he

was gratified that the plenary meeting had been successful.

The delegate of EGYPT expressed the appreciation of his delegation for the hospitality of Argentina. He thanked the Governments of Switzerland and Colombia for offering to host future plenary meetings, and he welcomed the Government of Peru as a member of the ICAC.

The delegate of INDIA thanked the Government of Argentina for its untiring efforts in making the 70th Plenary Meeting a success. He noted that the Steering Committee had mandated a considerable agenda for consideration by the Standing Committee during the next year, including improvement in statistics, analysis of cotton contract performance, consensus building on the establishment of an international center for cotton research, strengthening the finances of the ICAC Secretariat, development of the agenda for a Spring Meeting in April 2012 in Washington, USA, involving heads of delegations and the Standing Committee and successful coordination of the World Research Conference V in Mumbai in November 2011. He said that India is deeply committed to multilateralism, democracy and economic liberalism and that a strong, vibrant and financially sustainable ICAC fits into India's global vision for multilateral institutions. The delegate cautioned about the uncertain economic outlook for cotton during 2011/12. He wished the Government of Switzerland all success in hosting the 71st Plenary Meeting in 2012. His discourse is a statement of the meeting.

The delegate of ARGENTINA thanked delegates for their kind comments. He noted that many people had worked very hard behind the scenes to ensure a successful meeting, and he hoped that the meeting had resulted in a positive image for Argentina. He said that Argentina was happy with the choice of the topic for the Technical Seminar in 2012, “Intellectual Property Rights and the Role of Private Breeders.” He wished all delegates safe travels home.

The delegate of COLOMBIA congratulated the Government of Argentina for hosting the 70th Plenary Meeting. She said that delegates had been met with open arms and wonderful hospitality. She noted that Colombia has imported technology from Argentina and that the people of Colombia appreciate the cooperative relations with Argentina and other countries. She thanked Argentina for being generous with its culture, and she offered condolences to Argentina for the recent national tragedy in which the lives of three artists had been lost.

The delegate of TURKEY thanked the Government and people of Argentina for their excellent hospitality in hosting the 70th Plenary Meeting. He expressed special thanks to the Organizing Committee for arranging the technical tour to producing areas in the Northern part of Argentina. He thanked Argentina for sharing its advances in cotton production technology, and he thanked the Secretariat for its work. He said that Turkey is looking forward to next year in Switzerland. His discourse is a statement of the meeting.

The CHAIR thanked all delegates for their comments. He said that he appreciated the strong sense of solidarity, fairness and the search for efficiency that had been shown at the meeting. He appreciated the call by the Private Sector Advisory Panel for trade liberalization. He said that the meeting had shown that the state has an important role to play in cotton trade by transmitting policies clearly and in a timely fashion and by implementing policies that do not interfere with the free play of markets. He said that the state has a role in ensuring equity and fairness for all stakeholders and dignity to producers. His discourse is a statement of the meeting.

The CHAIR again thanked all delegate for their participation in the 70th Plenary Meeting, and he declared the Meeting adjourned at 10:50 hrs.

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Round Table

Biotechnology in Cotton

14:30 hr. Sunday, September 4, 2011
Dr. Fernando Ardila in the Chair

The meeting started with the introduction of members and the current status of the work done by the Round Table for Biotechnology in Cotton. Prior to the meeting in Buenos Aires, Dr. Keith Menchey, Chairman of the Round Table, asked members to give their views regarding issues to be considered. A summary of the comments received from members is shown below:

Views by Email

Argentina (Dr. Fernando Ardila)

- Technical aspects that could have an impact on international trade.
- Labeling of biotech products.

Australia (Mr. Adam Kay)

- Australia has not experienced any trade issues.
- Anti-biotech sentiments are of no concern in Australia.

Colombia (Mr. Jairo Palma)

- The high cost of biotechnology (high tech fee).
- Contamination of local materials with transgenic events.
- Put more emphasis on breeding and genetic engineering for events related to climate and extreme conditions, such as drought, inundation and pests like boll weevil and whitefly.
- Growers are dependent on multinational companies that own technologies.
- Campaigns from green groups to convince governments to stop using biotech products.
- High use of biotech products results in loss of biodiversity of native materials.

Egypt (Dr. Osama Ahmed Momtaz)

- Need to educate the public.
- Implications and impact of the technology on small growers.
- Current biosafety regulations and continuous update.

Pakistan (Dr. Tassawar Hussain Malik)

- Trade barriers
- Country wise regulatory setup in place to facilitate importation, testing, evaluation, approval and commercialization, and post release monitoring of biotech cotton varieties.

- Latest biosafety status and issues with approved agents.
- Performance of Bt cotton in various countries across the globe.

South Africa (Mr. Hans Willemse)

- The high cost of biotechnology is problematic.
- Farmers are concerned about the disparity in the pricing of biotech seed among countries while the value of the technology is relatively consistent.

Sudan (Dr. Abdel Bagi M. Ali)

- Experience with biotech cotton: merits and challenges.
- Barriers to technology transfer to developing countries and prospects for wider adoption of biotech cotton.

USA (Dr. Keith Menchey)

- Trade issues.
- The Round Table should publish a white paper.

Meeting on September 4, 2011

Highlights of the presentations and feedback from participants on September 4, 2011 are summarized below.

Australia (Mr. Adam Kay)

Australia is strictly employing refuge crop requirement to avoid the development of resistance to endotoxins as well as herbicide tolerance. Resistance is continuously monitored and additional options like heavy tillage are also employed to delay development of resistance. Of course, there is a cost involved in the implementation of resistance management strategies, but it is worth making these investments. The reduced use of insecticides in Australia because most area is now under biotech cotton is demonstrated in the form of a continuous decline in endosulfan contents in river water.

Australia is already working on the Resistance Management Plan for Bollgard III technology before it is approved for commercial use.

India (Dr. C. D. Mayee representing Dr. Keshav Kranthi)

India has greatly benefitted from insect resistant biotech cotton in terms of higher yields. India is at the final stages of testing Roundup Ready cotton. India has experienced the following issues as a consequence of adopting biotech cotton.

- With the introduction of biotech cotton in India, the focus on hybrids having biotech genes has increased significantly. Con-

sequently, a smaller number of hybrids dominate the planting seed market. The area under traditional diploids species and extra fine cotton has been squeezed to a minimum, threatening the production of short staple cotton.

- India was proud to have a large and experienced team of cotton breeders. The adoption of biotech cotton has affected the tradition of having a competent and strong team of conventional breeders.
- The reduced use of insecticides has resulted in an increase in secondary pests like mealybug.
- The high price of biotechnology is of concern to Indian growers. The Government of India had to intervene to regulate the technology fee, and farmers are now charged a technology fee fixed by the Government.
- The first two events of biotech cotton have been used extensively, and it is time to think beyond insect resistance and herbicide tolerance on issues like marker-assisted selection.

Dr. Keshav Kranthi further emphasized this issue via email following the meeting:

‘Though the benefits of biotech have been commendable, the next generation future plans appear to be undefined. Since almost all the biotech technologies were driven from the private multinational companies, the future plans may have been shrouded in secrecy. It is time that proper investment is made to strengthen public sector efforts in biotech cotton with solid collaborative technical plans between interested cotton growing countries for common good, which will then create possibilities for low cost products and long term sustainability.’

Colombia (Mr. Eduardo Roman representing Mr. Jairo Palma)

- In Colombia, biotech cotton is more popular among large growers compared to small growers.
- The high cost of the technology is of concern to Colombian growers. The cost of seed increased by 23% in one year in 2010/11. Mr. Roman repeated the issues sent by Mr. Palma by email and mentioned the points above.

Argentina (Dr. Fernando Ardila)

Biotech cotton arrived on the market in 1998 with Bollgard in a foreign variety. Adoption improved when the Round Up Ready trait was incorporated in a local variety from INTA in 2001. Adoption reaches around 90% at present.

Most cotton farmers cultivate small areas. The high cost of biotech cotton may explain the extended use by small farmers of seed from informal markets that prevents them from taking full advantage of biotechnology. To cope with the problem of the informal market, government, seed companies, local multipliers and the cotton industry have recently reached an agreement to facilitate the access of small farmers to certified biotech seeds at lower prices. However, biotechnology in the cotton seed market is ineffective against boll weevil, which is the main production constrain for small farmers.

Monsanto (Mr. Miguel Alvarez Arancedo)

Monsanto always analyzes the conditions suitable for adoption of biotech cotton very carefully. Monsanto makes sure that a country must have cultivation practices suited to growing biotech cotton, must have biosafety regulations in place, must be affected by target insects to be controlled and the country must allow import of biotech products as food and feed before offering commercial adoption of a biotech event. The candidate country must abide by patent laws and respect intellectual property rights and other intellectual frameworks.

USA (Dr. Bill Norman representing Dr. Keith Menchey)

Dr. Bill Norman talked about trade issues that restrict transportation of commercial goods and technologies across borders. In particular he brought up the following issues for consideration by the Round Table.

- Asynchronous international approval processes – In some cases certain products are approved in one country while others have to wait several years. Dr. Norman suggested parallel path for approval of new products.
- Adventitious presence issues – Some countries restrict importation of products with zero tolerance for biotech products. In case of violations, penalties are severe under local laws.
- Coexistence with organic and other production systems – Some specialty cottons prohibit the use of biotech cotton.
- Biosafety laws and regulations used as trade barriers – Biosafety regulations in some countries have specific barriers and ambiguities that are detrimental to international trade.

Brazil (Dr. Alderi Emidio de Araujo representing Dr. Paulo Augusto Vianna Barroso)

- Brazil took time to commercialize biotech cotton because of the regulation problems. The area that is suitable for planting of biotech cotton without risk to wild species of cotton has been mapped. Embrapa bases this map on three years of research. Now, all biotech events approved in the world are approved in Brazil (Bollgard, Bollgard II, Wide Strike, Roundup Ready, Liberty Link, Gly Tol, Bollgard + Roundup Ready, Twin Link).
- Biotech cotton was planted on about 260,000 ha, and the perspective for 2012 is about 600,000 ha of biotech cotton.
- Embrapa is introducing the genes Roundup Ready Flex and Bollgard II in local varieties.
- According to researchers and producers, the main benefits of biotech cotton are fewer sprays (reductions of at least two sprays per season) and reduced complexity of cultural practices. There is a perception of fewer sprays with the new biotech events that were recently approved. The use of biotech in cotton in Brazil in the next few years will be a marketing issue rather than a regulation problem.

Over 50 people from different countries attended the open meeting of the Round Table. Questions and comments from the floor are summarized below:

- Why has Australia not commercialized biotech canola?
- Is the emergence of secondary pests as major pests an epistatic effect of the Bt gene inserted in varieties?
- The need for coordination rises with the level of technology adopted.
- Biotech cotton should be grown as a part of a production system.
- Intercropping with crops susceptible to glyphosate is not feasible with Roundup Resistant cotton.

Future Plans

A closed meeting of the Round Table members decided the following plan for implementation.

- The ICAC Secretariat will prepare a report on the meeting, in collaboration with the Chair of the Meeting Dr. Fernando Ardila, and send it to all members.

- Dr. Keith Menchey, Chair of the Round Table will contact all members and ask them to submit a 'summary issue' in the form of a 3-5 pages report.
- Dr. Menchey in collaboration with the Secretariat will consolidate 'summary issues' in the form of a report based on consolidation of ideas and setting priorities.
- The report will be distributed to all members, and if need be the ICAC Secretariat will organize a conference call. Email communications will continue in any case.
- The consolidated report, if found appropriate, will be finalized as a report of the Round Table. If there is a need for more discussions/communications, the report will be discussed by the Round Table at the 71st Plenary Meeting in Switzerland in October 2012.

List of Members who Participated in the Meeting

- Mr. Fernando Ardila, Coordinador Nacional del INTA, Instituto de Genética, CICVyA, INTA, Aristizábal y El Nandú, Hurlingham, Buenos Aires, Argentina
Email: fardila@cnia.inta.gov.ar
- Mr. Adam Kay, Chief Executive Officer, Cotton Australia Ltd., 247 Coward St., Suite 4.01, Mascot, NSW 2020, Australia
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- Dr. Alderi Emidio de Araujo (Representing Dr. Paulo Augusto Vianna Barroso), Embrapa, Campina Grande, PB, Brazil
Email: alderi@cnpa.embrapa.br
- Mr. Mr. Eduardo Roman, (Representing Mr. Jairo Palma), Cotton Fund, Conalgodon, Bogota, D.C., Colombia
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- Dr. C. D. Mayee, (Representing Dr. Keshav Kranthi), Nagpur, Maharashtra, India
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- Dr. Bill Norman (Representing Dr. Keith Menchey), Vice President, National Cotton Council, Memphis, TN, USA
Email: BNorman@cotton.org
- Dr. M. Rafiq Chaudhry, Head, Technical Information Section, ICAC
Email: rafiq@icac.org
- Mr. Miguel Alvarez Arancedo, Regulatory Affairs Director, Monsanto, Buenos Aires, Argentina

First Breakout Session

Responsible Labor Practices in Cotton Production

9:00 hrs, Wednesday, September 7, 2011

Moderator: Ms. Patricia Jurewicz, Responsible Sourcing Network

Panelists:

- Ms. Judy Gearhart - Executive Director, International Labor Rights Forum (ILRF)
- Mr. Rajan Kamalanathan - Vice President of Ethical Sourcing, Wal-Mart Stores, Inc.
- Mr. Christopher Barty Ward - Agri-Consultant in Rondonópolis, Brazil

Trends and Challenges

According to the International Labour Organization (ILO), there is an estimated 215 million child laborers in the world (age 5 – 17, does not include children's work), with 60% of these in agriculture. For the cotton industry, the U.S. Department of Labor lists 16 countries as having known child labor, and 10 countries as having known forced labor. Labor abuses in the cotton industry exist globally and it is important for us to acknowledge them and determine solutions to address them.

Civil society organizations are building awareness about labor abuses in the cotton industry. ILO core labor conventions address child labor and forced labor, but also address “worst forms of child labor” (exposure to chemicals), discrimination, and freedom of association. Consumers are asking about workers in the cotton fields and how they are treated. There are a number of point-of purchase tools that are gaining in popularity in the United States. For example, the ILRF is working with the Not For Sale Campaign to grade companies at three levels of the supply chain: final produce, intermediate, and raw materials; the Free2Work app for cell phones (www.free2work.org) has had 20,000 downloads, demonstrating consumer interest to learn more about abuses in agriculture.

New legislation has recently been enacted that is impacting retailers' activities in their supply chains. California Transparency Act (SB 657) mandates that retailers have to post information on their websites that addresses how retailers are ensuring they do not have trafficking or slavery in their supply chains all the way to raw commodity level. http://info.sen.ca.gov/pub/09-10/bill/sen/sb_0651-0700/sb_657_bill_20100930_chaptered.html. Similar legislation has been introduced at the national level and Wal-Mart and other retailer/brands are taking a proactive approach, believing this may eventually become federal law in the US.

A number of material indices have been developed over the past few years that brands are starting to use to manage the social and environmental impacts of their products. The Sustainability Consortium (which Wal-Mart helped get off the ground and now it is independent) has been developing tools for measuring suppliers and raw material inputs. It is currently doing a “deep dive” with cotton towels to identify social and environmental hot spots.

The Sustainability Consortium:

<http://www.sustainabilityconsortium.org/>

Sustainable Apparel Coalition:

<http://www.apparelcoalition.org/>

Outdoor industries' Eco Index:

<http://www.ecoindexbeta.org/>

Retailers have been having a challenge with having full transparency to where all of their cotton comes from and accountability as to how it is harvested. Traceability has been a challenge and they have yet to find a solution that can be implemented. The fabric mills don't want to disclose where all of their raw material is coming from.

Solutions

To minimize labor abuses in cotton fields and with other commodities, the Brazilian government used a big stick by implementing “no tolerance” policies and stiff penalties for labor abuses. Now that growers understand the gravity of the situation, the Brazilian government is now implementing training, auditing and solution-based prevention. Growers are pushing for new legislation to improve health and safety, and reduce the number of work accidents.

Labor abuses could also be minimized with economic solutions. If farmers are earning more, they will want to ensure their children are in school. Technology affords farmers to implement better management practices, which increases yields and results in increased income for farmers.

Where do we meet? Farmers go downstream and retailers upstream?

Chris thinks that a universal bale identification system can be part of the solution since it will address the retail industry's need to have transparency down to the field level. It needs to have Third-party endorsement so it has credibility from both sides. It doesn't have to be fancy, everyone already numbers on bales, there just needs to be a system to coordinate everything. Traceability needs to travel from when bale is opened up through to when the yarn is spun. Once there is transparency and traceability, then the accountability for responsible labor practices needs to be included. This could follow the example of tobacco, where endorsement of the product includes stakeholder engagement; that way stakeholder groups have a chance to comment and improve the system.

Judy advocated for transparency, proposing that many of the lessons learned in monitoring in apparel can be leap-frogged if at least some reporting criteria can be agreed upon and governments can engage in industry oversight, through both enforcement and improvement initiatives. Attention needs to be paid to the information collected, since different stakeholders (government agencies, textile manufacturers, retailers, etc.) have different requirements for collecting information. For labor statistics, the ILO offers a good example of transparency. It reports out basic indicators

for its Better Work Program. Basic indicators of labor practices in the cotton industry could be harmonized and shared.

Patricia cited the example of conflict minerals from the Congo and spoke of how electronics industry associations developed a “conflict-free smelter” program where mineral smelters have to be audited by third-party auditors and that the list of verified smelters appears on a public website. Some detailed information is kept confidential. Something similar could be set up for cotton spinners. <http://www.conflictreesmelter.org/>

It is recommended that the cotton industry work with ILO to monitor the various challenges and implement solutions. The ILO has great programs through IPEC (International Programme on the Elimination of Child Labour). For example, keeping kids in school for first three years makes a huge difference. The ILO can have a “policing” function as well as “development” function. To solve the problems, we cannot just promote monitoring; there also need to be incentives (otherwise people are just going to want to hide the bad stuff).

The participants in the room developed recommendations it would like to see ICAC implement:

Recommendations of activities for ICAC to implement:

- Create, manage and promote universal bale identification
- SEEP convene a working group to develop an action plan to improve labor practices
 - Develop criteria for government, international organization and industry actions (below)
 - Stakeholders to include in working group: growers, traders, merchants, spinners, mills, cut & sew facilities, brands, retailers, industry assoc's, civil society, investors

Recommendations for ICAC to request of member governments:

- Adhere to ILO core labor conventions and cooperate with ILO monitoring & implementation
 - Enforce national labor laws (e.g. Whistle blowing, zero tolerance policies)
- Create incentives for responsible labor practices in the cotton industry tied to farmer support:
 - Establish domestic arbitration systems to guarantee payments to farmers
 - Support better growing practices with technology transfer and implementing best practices
 - Promote access to capital
- Participate in universal bale identification

Second Breakout Session

Debunking the Myths: Answering the Attacks on Cotton

11:00 hr. Wednesday, 7 September 2011

Chair: Dr. Patricia O'Leary, Senior Director, Agricultural & Environmental Research, Cotton Incorporated

Panelist:

- Mr. Jeffrey Silberman, Executive Director, International Forum for Cotton Promotion (IFCP)

- Ms. Elke Hortmeyer, Director, Economic Research, Publications & Communications, Bremen Cotton Exchange

Cotton and cotton textile industries are important to the economic well-being of more than 100 countries, developed and undeveloped, alike. In spite of its benefits, cotton, cotton production in particular, has been mischaracterized as having negative environmental and social impacts. Among those voicing claims against cotton are businesses seeking a competitive advantage and non-governmental organizations. By way of an introduction to the session topic and providing background for the ensuing discussion, the

panelists presented examples of the "myths" that are being propagated through various media channels and on the internet.

Key points of the discussion

- The question "Who is the audience?" needs to be answered.
- To get our message out we need to build a relationship w/ journalists.
- The improvements made in cotton production worldwide need to be publicized to a greater extent. The attributes of cotton and the cotton production system need to be promoted.
- Openness and transparency are needed in the cotton industry. Weaknesses in the production system need to be identified, and the actions being taken to address them promoted.
- Retailers have the power of communication to consumers. Some have pitted one kind of cotton against another with conventional

cotton taking the brunt of the attacks.

- By beating up on conventional cotton, the organic industry has inadvertently become an ally of synthetic fibers.
- In contrast to the organic industry, Pima does not market itself by denigrating upland cottons.
- We should refrain from attacking the competitive cottons and place our focus on the real "enemy"-- synthetic fiber -- and promote the comparison of cotton vs. synthetics, not one cotton vs. another.
- We need reliable information on the production of synthetic fibers.
- A workshop should be developed for the 71st Plenary Meeting of the International Cotton Advisory Committee meeting in Switzerland that focuses on the comparison between cotton and synthetics.

Third Breakout Session

Demand Enhancement: A Bargain at Any Price

11:00 hr. Thursday, 8 September 2011

Chair: Mr Allen Terhaar, Cotton Council International

Panelists:

- Ms. Judy Gearhart, Executive Director, International Labor Rights Forum (ILRF)

- Mr. Zbigniew Roskwitalski, Gdynia Cotton Exchange

- Mr. Haroldo Rodrigues da Cunha, Brazilian Cotton Institute

- Mr. Mark Messina, Cotton Incorporated

- Dr. Alejandro Plastina, ICAC

The session was organized by the International Forum for Cotton Promotion (IFCP). Representatives from around the world shared thoughts on the challenges of consumer demand enhancement for cotton in the face of extreme price volatility and offered information on best practices for demand enhancement from their individual experiences.

Key points of discussion

Allen Terhaar – Cotton Council International

- The title "Demand Enhancement: A Bargain at Any Price" refers to both the impact of cotton demand enhancement given the recent volatility of cotton prices and to the costs

of various approaches to demand enhancement.

- There is a lot of anecdotal information that the tripling of cotton prices during the past 12 months has led to short-term substitution of other fibers for cotton, and to a new long-term consideration by a number of cotton-dominant brands/retailers to shift to alternative fibers because of the squeeze caused by cotton price volatility and a perception that food will win out over fiber for scarce agricultural resources.
- On the other hand, cotton stocks will be rebuilt somewhat this year owing to reduced demand and increased production, leading to supply exceeding demand and a need to keep cotton in front of the consumer.
- The fundamentals of total fiber demand expansion globally remain strong. As always, the strength of cotton demand will come down to consumer preference and the supply chain willingness to supply what the consumer prefers at an acceptable price – which is where demand enhancement can play a role in establishing and reinforcing that consumer preference and working with the supply chain to maximize cotton's share and profitability.

Dr. Alejandro Plastina – ICAC Secretariat:

- World fiber demand continues to grow strongly and has essentially recovered its trajectory as compared with the pre-recession period. Cotton consumption has not recovered as significantly as synthetic and man-made fibers.

Haroldo Rodrigues da Cunha – Brazilian Cotton Institute:

- Brazil has a rapidly expanding economy and middle class at this time, providing opportunities to promote cotton consumption at the consumer level.
- The Brazilian Cotton Institute has as one of its objectives the generic promotion of cotton in Brazil. It has studied demand enhancement options, done consumer research, and worked with a public relations/advertising agency to design an approach and action plan for promotion.
- The Brazilian Cotton Institute has received input from the International Forum for Cotton Promotion (IFCP) regarding strategies and tactics for consumer demand enhancement, including a two-day idea exchange session in Sao Paulo the previous week.

This information exchange will be useful in designing effective programs for Brazil.

Zbigniew Roskwitalski – Gdynia Cotton Exchange:

- Poland is another country with a growing economy and middle class, and represents opportunities for demand enhancement.
- Mr. Roskwitalski detailed some of the challenges of maintaining cotton market share in Poland and more broadly in Europe. He went on to detail actions put on place in Poland to bring attention to cotton at the consumer level including registration, licensing and use of the international emblem for cotton acquired from the defunct International Institute for Cotton.
- Mr. Roskwitalski additionally highlighted the objectives and work of the IFCP to provide information regarding the merits and techniques of consumer demand enhancement for cotton globally.

Mark Messura – Cotton Incorporated:

- Cotton is struggling to maintain and expand market share, and the spike in cotton prices did not help. It is even more important to get good information out to the consumers and the supply chain about cotton and cotton products in this environment. It can be done, and needs to be done in order to keep cotton preferred and competitive.
- There is a wide range of programs and projects that can be carried out to enhance consumer demand for cotton – and the range of cost options for these varied approaches can go from very expensive to very inexpensive.
- Television advertising, celebrity endorsement, followed by print media advertising, are on the high-cost end of the spectrum. Some intermediate cost options are events, radio, fashion shows, and web sites. More modest cost approaches involve engaging the industry and partners to do what is good

for product visibility and highlighting cotton/natural fiber while drawing free media coverage when possible – examples of this are working with local fashion institutes, expert speakers, getting brand/supply chain partner involvement in “cotton day” events, charity tie-ins, etc.

- Demand enhancement should be tailored to local conditions and budgets. Lack of a large funding base should not be an excuse for failure to promote.

The session was well attended, and based on the questions asked and the opinions put forward, it appeared that the audience recognized the importance of generic cotton promotion. Participants and attendees agreed that polyester is an important long-term threat to the cotton industry, and that negative messaging is not productive. The IFCP indicated that the way to begin working with the organization is to contact the executive director through the website <cottonpromotion.org> or by email <jeff@icac.org>.

Fourth Breakout Session

Measuring Cotton Supply and Use in the 21st Century

13:45 hrs., Thursday, September 8, 2011
Chair: Armelle Gruère, Statistician, ICAC.

The Chair welcomed the participants and explained that the session would provide increased transparency on ICAC cotton supply and use statistics via three means: 1) learning about the sources of ICAC estimates on cotton supply and use; 2) learning about and discussing the different methodologies used by several countries to assess cotton supply and use; and 3) debating the importance of establishing a cotton balance sheet at the country level. She introduced the panelists.

The session started with a presentation from the Chair on the ICAC sources of estimates of cotton supply and use. Mrs. Gruère explained that the Secretariat of the ICAC collects historical data on cotton supply and use by country. These data are entered into the ICAC database, which includes over 100 countries and goes from 1940/41 to 2011/12. For each season and each country, a cotton balance sheet is maintained, composed of six main variables: beginning stocks, production, imports, consumption, exports and ending stocks. She then described the main sources of estimates of production, consumption, trade and stocks and explained the challenges faced. She explained that the quality of the data collected by Secretariat of the ICAC determines the quality of their database on cotton supply and use and their subsequent analyses. In particular, ICAC

cotton price forecasts are developed with a model based this database. She emphasized the need for countries to develop their own cotton balance sheet and estimate each element independently, including consumption and stocks, as well as to publish regularly up-to-date data on production, consumption, trade and stocks. Mrs. Gruère invited participants to read her article on the same topic, published in the May-June review of the ICAC.

Mr. James Johnson, from the United States Department of Agriculture, explained that the USDA was very transparent regarding its estimation of cotton supply and use in the United States. He encouraged all participants to consult the documents already prepared by the USDA for the June 2011 Beijing workshop, which describe how the USDA estimates each element of the US cotton balance sheet. Crop estimation in the United States is guided by the principles of accuracy, objectivity and timeliness. Mr. Johnson then explained how the USDA also maintains a database of world cotton supply and use, relying on a balance sheet methodology (similarly to the ICAC). He noted that maintaining a balance sheet allows discovering errors and bias in the estimation of the elements, the estimation of ending stocks, and provides a longer term perspective. Mr. Johnson had to leave the session early in order to attend the meeting of the drafting group, taking place at the same time.

The representative of India read a statement prepared by V.Srinivas, Joint Secretary to Government of India and Head of the Indian Delegation. This statement recalled that the Beijing workshop had revealed the vast divergence in data collection and publication systems. Measuring cotton supply, consumption, stocks and exports is a critical element of the cotton policy in India, and helps to formulate India's cotton trade policies. The Cotton Advisory Board (CAB) is an official body that gathers all stakeholders in India's cotton industry, including traders, ginner, farmers, spinners, state governments, the Ministry of Agriculture, the Ministry of Commerce and the Ministry of Textiles. The CAB formulates a cotton balance sheet four times in a cotton season, to help the government to formulate its policies. Cotton stocks are estimated as the residual in the balance sheet. The statement explains how cotton production, mill use and exports are estimated. However, it notes that following the Beijing workshop, gaps in India's tool kit were identified and are currently being addressed: 1) the estimation of loose cotton stocks in India (cotton neither pressed nor ginned) is difficult to estimate and had been assumed constant for some period of time; and 2) India recognizes the need to implement mandatory reports from various stakeholders in order to improve data collection (in particular from ginner, spinning mills and warehouses). The statement concludes by stating the support of India to ICAC's efforts

in improving measurements of cotton supply and use, and India's offer to provide technical assistance for countries seeking to develop their estimation tool kit and institutions for data collection. The statement also asks that a guide on best practices for measurement of cotton supply and use be developed, to the benefit of all ICAC member countries.

Dr. Muhammad Ali Talpur from the Pakistan Central Cotton Committee (PCCC) explained how the PCCC estimates cotton production and consumption in Pakistan. Cotton production is initially estimated based on variations in cotton area and historic yields. During the growth period, the estimate of production is refined based on average plant population per acre, average number of bolls per plant and average boll weight. Cotton consumption is estimated on the basis of variation in installed and operating capacity of textile mills and previous years' cotton consumption by unit. Stocks are estimated as a residual in the cotton balance sheet.

Mr. Andrés Sipowicz, from the National Institute of Agricultural Technology in Argentina (INTA), presented a proposal to strengthen and modernize the estimates of cotton area, production and quality in Argentina. He explained that agricultural statistics in Argentina were based on private sector informants, provinces' statistics, and Ministries' and national organisms' statistics. The proposal is to improve the estimates cotton area and production estimates, better integrate data collection activities amongst provinces, the Ministry of Agriculture, INTA and other national organizations, survey the national cotton area throughout the season, incorporate quality measurement in the system, and perform periodical surveys of farmers, service providers and other actors in the cotton chain. These efforts will result in an improved confidence level in the production level and quality of Argentine cotton, improved coordination amongst organisms, improved understanding of the factors affecting farmers' planting decisions and of the problems they face, as well as improved data in order to allow informed policy decisions.

Mr. Tiena Coulibaly, from Mali's Company for Development of Textile Fibers (CMDT), explained how cotton production is estimated in his country. There is little cotton consumption in Mali and the CMDT knows exactly how much it is. Most cotton production (around 98%) is exported. Stocks are determined based on periodic surveys. Mr. Coulibaly explained that CMDT uses four main steps to determine cotton production: 1) correction of cotton area figures provided by farmers based on determination of exact cotton area in a representative sample, 2) estimation of expected cotton production based on counts of plants and healthy/damaged bolls in a sample, and 3) adjustment of expected production estimate based on weighing of seedcotton received in 10% of markets, to help plan for the marketing and ginning phase. Mr. Coulibaly said that the current methodology used to forecast and estimate cotton production in Mali is overall satisfactory. They are working to improve the forecast of production based on counts of plants and bolls, since this estimate is often larger than the final production. In addition, they are aware that their cotton area estimate could be improved.

Mr. Bachir Diop, President of the African Cotton Association, noted that the systems used to estimate cotton area and production were very similar in all West African countries. This system worked very well for 30 years, with a very small error margin. However, in the last five years, as farmers' revenues from cotton declined following the drop in cotton prices, the incentive to declare a larger cotton area than actually planted in order to obtain agricultural inputs for other crops grew strongly. As a result, cotton area in West African countries is now overestimated. No solution has been found yet to solve this problem. In answer to a question, Mr. Diop noted that the cost of collecting and processing cotton area and production data throughout the season was not separated from the other costs incurred by cotton companies and is therefore hard to estimate.

In response to a question from Mr. Diop on the benefits of using satellite imagery to measure cotton area, Mr. Andres answered that satellite imagery is a useful tool to measure cotton fields larger than 20 hectares. However, it is not for smaller fields, such as the ones existing in many countries. He noted that the United States relies on farmers' surveys to estimate cotton area and find this methodology reliable.

The Chair asked each speaker whether their country maintained an official cotton balance sheet. The United States, India and Pakistan do, while Mali has one but not formal (elements of the balance sheet can be found in different places), and Argentina does not have one.

The Chair asked each speaker what main challenges their country was facing in measuring cotton supply and use. Mr. Talpur noted that the methodology used to estimate cotton production in Pakistan is very good. However, because textile mills are taxed on their activity by the government, they have an incentive to escape providing data on cotton utilization. Also, stocks are currently estimated as a residual in the balance sheet and may reflect errors in the cotton mill use estimate. Mr. Talpur expressed the wish that methodologies to estimate cotton supply and use be shared amongst countries. The delegate of Mali noted that they have no way to know if their cotton area estimate is correct because they estimate area only once during the season. Also, the production estimate developed right before ginning is often larger than the final production estimate, and they are trying to find out the origin of this overestimation. Mr. Sipowicz mentioned that in Argentina there was a lack of interest in knowing the exact cotton production estimate but that efforts were made by the government to change this situation. He noted the challenge posed by the large distribution in farm sizes (there are both very large farms and very small farms).

The meeting was adjourned at 15:30 hrs.

IFCP Lunch and Round Table Discussion Among Textile Educators and Industry Partners

Educational Steps in Cotton Technology: From Fiber to Clothing

12.30 hr. Wednesday, September 7, 2011

Moderator: Iwona Frydrych, Technical University of Lodz

Presentations:

- Mr. Axel Drieling, Chances for Cotton in German Textile Education, Faserinstitut Bremen, Germany
- Mr. Dean Ethridge, Education, Outreach and Promotion on Behalf of Texas Cotton, Texas Tech University, USA
- Mr. Jean-Paul Gourlot, Evolution of Products, Industries and Training Facilities for the Cotton Industry's Future, CIRAD, France
- Mr. Mark Messura, Cotton Incorporated's University Sponsorship Program, Cotton Incorporated, USA
- Mr. Jeffrey Silberman, FIT Denim: A Venture into Experimental Teaching, Fashion Institute of Technology (FIT), USA
- Mrs. Iwona Frydrych, New Infrastructure of Clothing Team of the Department of Clothing & Textronics, Technical University of Lodz, Poland

Key points of presentations

Presentation 1. Axel Drieling reported about the chances for cotton promotion in German textile education. In Germany, the production of textiles has, based on the competition with countries with e.g. less labor costs, mainly switched to technical textiles. As university education for technical topics has to focus on the current and future demands of the industry/economy, and as students are predominantly choosing for future topics, most universities modified their lectures accordingly, and are focusing more on the technical textile production than on clothing and home textiles. Nevertheless, an important field in the German textile industry is a textile product design. Therefore, several universities are offering courses of study in the textile and fashion design, and many students are choosing these creative courses accordingly. Cotton promotion in these courses will be ideal for promoting the advantages and therefore, the future use of cotton.

Presentation 2. The Fiber and Biopolymer Research Institute of Texas Tech University conducts a vigorous program of graduate education and research related to cotton fibers. Graduate courses include the following:

- U.S. and Global Cotton Fiber & Textile Industries

- Advanced Studies in Cotton Fibers
- Structure and Functionalization of Cotton Fibers
- Biopolymers and Bioproducts
- Structure and Conduct of Global Fiber and Polymer Industries

In the professional education program the Fiber and Biopolymer Research Institute conducts an annual Texas International Cotton School. This is done as a collaboration between the Texas cotton merchants who make up the Lubbock Cotton Exchange and the faculty and staff of the Fiber & Biopolymer Research Institute. The School is held each year for two weeks during the month of August, with students involved in classroom instruction, laboratory demonstrations, and field trips throughout this time. The School has been in existence for 22 years. Since its inception, there have been a total of 514 students from 59 countries and 16 states within the United States.

In 2010 a major promotional/educational project was done as a collaboration of the Plains Cotton Cooperative Association (PCCA), the Apparel Design and Manufacturing Department (ADM) of Texas Tech University, and Cotton Council International (CCI). It was dubbed the "Denim Runway 2011" design contest and competition was among the apparel design students at Texas Tech University. The success of this project has resulted in agreement for another Denim Runway Design Contest at Kansas State University, which begins on September 13, 2011 with interactive tours and presentations.

Presentation 3. Thinking about well trained persons in 40 years of his experience requires to look at various aspects like products evolutions, supply chain organization, public and private services, the actual offer of training/teaching and their evolution in time.

After analysis, it seems that the offer of training and its evolution may not be a limiting factor as textile and cotton industries are highly mechanized and automated. Thus, these industries will benefit from the according training in the constant evolution to meet the need of all industries.

In any industry, while the number of products is increasing, the number of companies is decreasing due to concentration efforts. In these conditions, the textile and cotton industries will need higher skilled and motivated persons. But, more problematic seems to be the recruitment and the attractiveness of the textile and cotton

industries. So better than wondering about training evolution, which can easily adapt to the given situation, textile and cotton industries have to attract young people by enhancing its presence into the "fun" activities young people like.

A tentative road map was proposed to start lobbying the persons at present being responsible of the textile and cotton industries to from now vote the teaching and research and development budgets accordingly.

Presentation 4. Mark Messura, speaking on behalf of the IFCP and Cotton Incorporated, discussed the industry workshop and education initiatives in the United States. A university sponsorship program was described that provides support to colleges and universities through a competitive funding process. Applicants can propose ideas to raise the level of awareness about cotton among students in design, textiles and merchandising programs. In 2011, Cotton Incorporated provided approximately one million dollars in grants to 25 schools and will provide a similar amount in 2012.

Students and faculty, who participate in these sponsored projects often tour the research center and headquarters of Cotton Incorporated and visit cotton farms to enhance their learning about cotton.

Presentation 5. Jeffrey Silberman of the Fashion Institute of Technology (FIT) in New York City and the International Forum for Cotton Promotion (IFCP) presented the FIT Denim program, having just completed its 7th year. The project is a B.S. degree level capstone course, required by students in their final semester before joining industry or continuing on to graduate education. The program is geared toward acclimating the graduating seniors to the 21st century workplace, thus increasing interest and reducing the learning curve that benefits both students and potential employers. The project has graduated over 300 fabric developers and quality assurance professionals who are now growing into decision-making roles of influencing fiber contents of products. The project has also enabled the insertion of cotton related curriculum into the program's course of study, and demonstrates how future emerging fabric developers can utilize the resources that cotton has to offer. Professor Silberman also pointed out that the textile and related industries are attracting new found interest from students wanting to study sustainability, as ecological insults and improvements fall into the fabric development and processing segments of the global supply chain.

Presentation 6. In order to attract the students and be competitive on the market the Faculty of Material Technologies and Textile Design wrote and has got the investment project of acronym CLO-2IN-TEX. Iwona Frydrych presented the new equipment in the Clothing team of Clothing and Textronics Dept. of the Technical University of Lodz being the basic tools for the clothing design and technological process fulfilling so called mass customization requirements. The clothing team in the frame of CLO-2IN-TEX has built 5 new laboratories: Laboratory of Clothing Design, Technological Sewing Laboratory, Laboratory of Glued Stitches, Laboratory of Thermal Treatment, Laboratory of Clothing Utility Comfort. To the Laboratory of Clothing Design the 3D scanner TC² and Lectra System's software were bought. The Technological Sewing Laboratory was equipped in 3 lines of machines: the technological line for the sewing the

light clothing, technological line for the sewing the heavy clothing, and technological line for the trousers sewing. The Laboratory of Glued Stitches was equipped in the continuous fusing machine with a long belt, ultrasound machine for stitch sealing, ultrasound machine for bonding the thermoplastic materials. Laboratory of Thermal Treatment is equipped now in the following machines: a press for forming fronts in the suit, pneumatic press, topper for ironing the trousers without edges, mannequin on the water vapor. To the Laboratory of Clothing Utility Comfort the following devices: thermal mannequin, device for fabric bending rigidity assessment, digital device for the fabric bending rigidity measurement, device for the drape measurement, computer image analysis stand – Digiteye were purchased. The presented new infrastructure allows carrying out multidirectional research and high-tech oriented educational process

Discussion

During the discussion people from Switzerland and Kenya said that it was very interesting for them session and suggested to continue it in the future.

Conclusion

According to opinions by participants and observers, information presented at the session should be continued to give the view on the educational systems in different countries, and explore ways to insert cotton topics into courses of study. So far only two continents were represented: Europe and America. It would be very interesting to get more information from countries from the rest of continents, South America, Asia and Australia.

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 2011
4. COTTON: World Statistics – September 2011
5. The Outlook for Cotton Supply in 2011/12
6. World Textile Demand – September 2011
7. World Cotton Trade – September 2011
8. Cotton Production Practices - September 2011
9. THE ICAC RECORDER - June 2011
10. Report from the Standing Committee - The Creation of an International Center for Cotton Research
11. Production and Trade Policies Affecting the Cotton Industry – September 2011
12. Directory
13. Procedural Matters for the 70th Plenary Meeting

WORKING PAPERS

- I. Election of Standing Committee Officers
- II. Renewal of the Contract of the Executive Director
- III. Topic of the 2012 Technical Seminar

REPRESENTATION LIST

Argentina

Official Delegates

Enrique	Oberlander	Secretaría de Producción	Santiago Estero
Enrique	Orban	Ministerio de Producción y Ambiente	Chaco
Luis	Pellegrino	MAGyP	Buenos Aires
Diana	Piedra	INTA	Chaco
Wilda	Ramirez	SENASA	Buenos Aires
Carlos Alecio	Sartor	SEC. DE SIST.AGROP., AGROAL Y BIOC.-SANTA FE	Santa Fe
Pablo	Urdapilleta	MAGyP	Buenos Aires
Jorge	Vartparonian	Fed Arg de Industrias Textiles- FITA-FULCPA	Buenos Aires

Argentina**Invited**

Teresa	Acevedo	UCAL	Chaco
Ramon	Aguilera	Instituto Paippa	Formosa
Sebastian	Aleonada	Ministerio De Agricultura, Ganaderia Y Pesca	Buenos Aires
Miguel	Almada	MAGYP	Buenos Aires
Bivanilda	Almeida Tapias	Embajada de Brasil	Brasil
Carlos	Almiroty	Centro de corredores y Consinatarios de Algodon	Buenos Aires
Daniela	Altamirano	Eap n5	Formosa
Miguel	Alvarez Arancedo	MONSANTO	Buenos Aires
Ricardo	Angelucci	MAGyP	Buenos Aires
Ana	Arce	Sepyme	Buenos Aires
Guillermo	Arevalo	Agencia De Desarrollo Formosa	Formosa
Maximiliano	Artaza	Eap n 5	Formosa
Ezequiel	Azar	Fibraltex S.A.	Buenos Aires
Oscar	Balbi	MAGyP	Buenos Aires
Jose Antonio	Ballesteros	Cooperativa	Chaco
Maria Elena	Barbagelata	gobierno de santa fe	Buenos Aires
Brian	Barolin	Universidad Tecnologica Nacional	Santa Fe
Lucrecia	Barrio	Ministerio de Agricultura	Buenos Aires
Leandro	Bartolomé	Revista Chacra	Buenos Aires
Carlos	Basaldua	FITA	Buenos Aires
Carlos	Basañes	IICA	Buenos Aires
Enzo Dardo	Bejarano	Instituto Paippa	Formosa
Lucas	Benedetti	Ministerio de Agricultura	Buenos Aires
Pedro	Bergaglio	Fundacion PROTEJER	Buenos Aires
Marcelo	Berretta	INTA	Buenos Aires
Roberto	Billard	INTA	
Marta	Bodenmann		
Alejandro	Bogo	TN Platex	Buenos Aires
Jorge	Bosch	Genetica Mandiyu	Chaco
Hugo	Brites	Federación Agraria Argentina	Chaco
Dionisio			
Marina	Buschiazzo	INTA	Chaco
Daniel	Cano	Colonia El Alba	Formosa
Eugenio	Cap	INTA	Buenos Aires
Hugo	Carbonel	EA N5	Formosa
Carlos	Cardozo	Ministerio de Produccion de Ambiente	Formosa
Maria Fernanda	Carrasco	Universidad Tecnologica Nacional	Santa Fe
Agustin	Carrozo	IHO Hilados	Buenos Aires
Carlos	Caruso	Cámara Algodonera	Buenos Aires
Florencio	Centurión		Formosa
Adolfo	Cerioni	INTA	Buenos Aires
Miguel	Chercasky	Cámara Algodonera	Buenos Aires
Alberto			
Yamila	Conti	Secretaria de la Industria	Buenos Aires
Gabriela	Corna Torre	IICA	Buenos Aires
Elena			
Mercedes	Corregido	Senadora Nacional	Chaco
Leonardo			
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Demian	Dalle	FITA	Buenos Aires
Benjamin	Deniz	Cooperativa Toba	Chaco
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Fabian	Di Donato	Camara de Diputados	Chaco
Victor	Di tella	INTA	Buenos Aires
Jorge	Diaz	Foro de la Agricultura Familiar	Santa Fe
Horacio	Echevarria	Cooperativa Agropecuaria de Charata Ltda.	Chaco
Valentin			
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Jose Luis	Esperon	INTI	Buenos Aires
Hugo	Fernandez	Consejo Profesional de Ingenieros Agronomos del Chaco	Chaco
Raul	Fernandez	Secretaría de Medio Ambiente	Chaco
Sebastian	Fernandez		
	Gallardo	Paipa	Formosa
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Abelardo	Firpo	Union Agricola de Avellaneda	Santa Fe
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Lucrecia	Insaurralde	Federacion Agraria	Chaco
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Justo	Ivanovich	Cooperativa Macharay	Chaco
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Eduardo	Kapetinich	Senado	Chaco
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Argentina

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Danilo	Blasich	Productor Agropecuario	Santa Fe
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Nicolas	Bonofiglio	Ministerio de Industria	Buenos Aires
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