



ICAC

ANNUAL REPORT 2020



INTERNATIONAL
COTTON
ADVISORY
COMMITTEE



Members Of The Secretariat

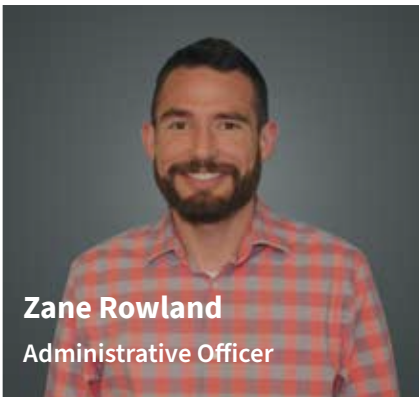
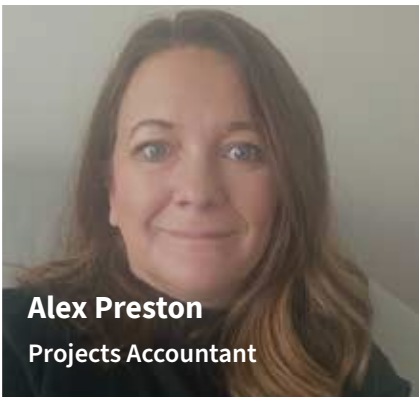
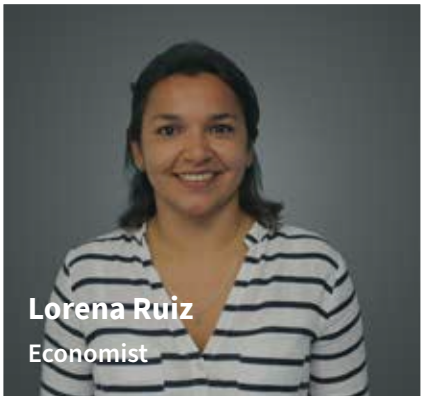


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Letter from the Executive Director

By Kai Hughes

This Letter is based on the Executive Director's speech delivered at the 78th Plenary Meeting in Brisbane, Australia, 2-6 December 2019



Since I became Executive Director in 2017, it's been a transformative time for the ICAC. A venerable organisation whose origins date back to 1939, the ICAC has been a powerful voice for the global cotton community for decades and is recognised as the premier provider of impartial data for all things cotton.

But new challenges require new solutions, and today's ICAC must adopt a modern approach to continue serving the hundreds of millions of people around the world who depend on cotton for their livelihoods.

That means embracing technology and innovation, and ensuring that our focus is not on food or fibre, but rather, on the people whose lives depend on the continued growth of a sustainable cotton industry.

The Need to Realise Cotton's Potential

With that in mind, it is appropriate the most recent Plenary Meeting was held 2-6 December 2018 in Abidjan, Cote d'Ivoire, because Africa

holds so much future potential for cotton. The continent produces about 6% of the world's cotton but exports the vast majority of it. If more of that fibre could be spun and made into finished products, it could generate billions of dollars in additional revenue annually, as well as employing millions of extra people.

As the global population grows so too will the middle classes, who will have more money to spend on clothing, which represents 80% of the demand for cotton. To put it bluntly, we need more of it – and that can only come about from either increased acreage or increased yields. This is where Africa can have a huge impact. If we can raise the yields of Africa's top five producers of raw cotton to the global average, it would equate to an increase of nearly 1 million tonnes of fibre.

Learning to Embrace Innovation

After nearly 80 years of existence, the ICAC needed to reinvent itself to meet the needs of a fast-changing world. It was time to review the structure of ICAC, the way it is governed and funded, the functions it performs

and the services it provides. That new approach is reflected in the Strategic Plan that will not only prepare us for the future, but will also produce a more dynamic, innovative and efficient ICAC.

A lot has happened over the past year, with the major developments including:

Communications. It is critical that ICAC continue to be recognised as the primary provider of information on cotton issues, and to do that we needed to improve our use of information technology and social media to reach more people, more effectively. That process is well underway with encouraging growth for the Twitter and LinkedIn accounts, as well as the impact of the #TruthAboutCotton awareness campaign to combat misinformation about cotton in the media.

Membership Growth. The cotton community is a family and we are stronger together. Therefore, it should be no surprise that membership retention and recruitment is a top priority in the Strategic Plan. After all, the greater the number of members, the more impact the ICAC can have globally. To make that happen, we too must look at ourselves as an organisation and see where we can add real value for our members and we need help from key strategic partners who can provide the support and resources that we do not have, given the size of the Secretariat.

Impact in the Field. It is not enough for the ICAC to provide data, no matter how insightful and impartial. Our organisation needs to do more to help those who need it the most, and that is happening through the projects ICAC is engaged in – 14 in all, many of which will have a fundamental impact on the cotton world. They range from projects on yield enhancement, seed development, producing sustainable supply chains, traceability and specialised training. Two projects in particular have the potential to have a major impact for least developed countries in particular:

The Soil & Cotton Plant Health App, which is being developed by the Social Economic and Environmental Panel (SEEP) and is being supported by Cotton Incorporated; and

A Virtual Reality Cotton Training Programme aimed at increasing yields. Both have generated tremendous interest, particularly in Africa, and now we are currently looking for partners to help us put them into action. Read more about these two exciting initiatives on page 28.

A Day to Celebrate. World Cotton Day is an initiative we launched in October with key partners from the United Nations and the World Trade Organisation. By raising the profile of cotton with a joint global effort on just one day a year, we can raise awareness of the benefits of this beautiful natural product and hopefully encourage demand for it.

Letter from the Standing Committee Chair

By Maha Zakaria

This Letter is based on the Standing Committee Chair's speech delivered at the 78th Plenary Meeting in Brisbane, Australia, 2-6 December 2019



In accordance with the rules and regulations of the ICAC, the Standing Committee at its 561st meeting unanimously endorsed the nominations of myself to serve as Chair of the Standing Committee from the end of the 78th Plenary Meeting. The Standing Committee also endorsed the nominations of Mr Selman Kurt, Commercial Counsellor at the Embassy of Turkey, to serve as First Vice Chair and Mr Anshul Sharma, Commercial Counsellor at the Indian Embassy, to serve as 2nd Vice Chair.

The Past Year

Last year at the 77th Plenary Meeting in Abidjan, Cote d'Ivoire, we approved and adopted a three-year Strategic Plan starting on 1 July 2019 aimed at revitalizing and growing the organisation. We continue to look at all the functions of the ICAC to ensure that they are appropriate for a modern, dynamic organisation in the 21st century.

Part of that review held at our annual Strategic Away Day in July 2019 was to revisit and update the ICAC's Mission, Vision and Values. In addition, we discussed how we can ensure continuity amongst the Officers of the organisation so that we can avoid the situation where the Chair is posted before the end of his or her appointment in the office – which is exactly what happened with my tenure as Standing Committee Chair.

Earlier this year, the Standing Committee agreed that the core officers consist of the First Vice Chair, the Chair and the Immediate Past Chair. In addition, we assessed the changes we could put in place to ensure that our Plenary Meetings would be more streamlined and interactive. We also are continually looking at how we can add value to ICAC membership so we can attract new members and retain the members we already have.

Last year, the Chair reported that we are leveraging technology to ensure that the ICAC is at the forefront of digital innovation. In 2018, we introduced an attendee app for the Plenary Meeting as well as a new ICAC website. However, perhaps the most exciting use of technology are the two projects developed by the ICAC to increase yields.

Perhaps the most memorable event from the past year was the launch of World Cotton Day at WTO headquarters in Geneva on 7 October (read more about it on page 38). This was an ICAC initiative supported by our partners at the WTO, UNCTAD, ITC and FAO. The launch was a huge success, attended by more than 700 people including 12 Ministers. Moving forward, the C4 countries have taken the initiative to propose to the United Nations that 7 October be officially reserved as World Cotton Day on the permanent UN Calendar – a decision that hopefully will be made before World Cotton Day 2020.

The ICAC, through its Private Sector Advisory Panel, will now coordinate efforts to promote World Cotton Day each year, and we encourage everyone to make their own plans to celebrate the world's most important natural fibre on 7 October.

My Sincere Appreciation

My thanks once again to the government of Australia for their hospitality in Brisbane, and to the Organising Committee and the Conference Manager Jann George who – along with the ICAC staff and in particular Business Development Manager Caroline Taco – has done an outstanding job.

I would like to express my sincere appreciation and thanks to my fellow Standing Committee members in Washington for their support in the work of the ICAC over the last year. In addition, I would like to thank the Chairs and members of all the ICAC committees for their continued commitment and enthusiasm.

Finally, I would like to recognise the work of the Chair of the Private Sector Advisory Panel Mr Peter Wakefield, who not only has travelled the world from his home in Shanghai to attend meetings in Washington, but also has represented the ICAC on implementation of the ePhyto project. The PSAP is undergoing a major transformation as we look at ways in which we can engage with the private sector in a more productive manner, and Mr Wakefield has been working with the Executive Director to overhaul the composition on the PSAP to ensure that the very best individuals from the private sector representing national associations are included.

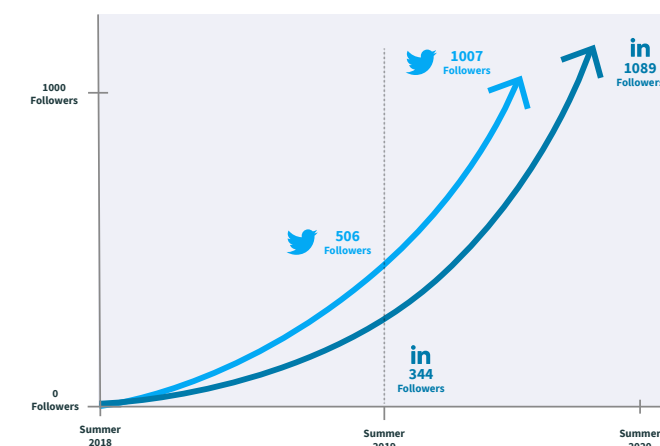
This means that the PSAP will now work through the ICAC and its Director of Communications to develop initiatives aiming at increasing demand for cotton and countering the many myths and the 'fake news' that is often spread about cotton. All these changes were approved by the Standing Committee at its 561st meeting and it is hoped that this will encourage a strong and meaningful dialogue between governments and the private sector as we tackle issues that impact the global cotton and textile value chain.

But every Committee and subcommittee needs members of staff who service and support them, and my thanks and gratitude go to the ICAC Secretariat for their excellent work and support over the past year.

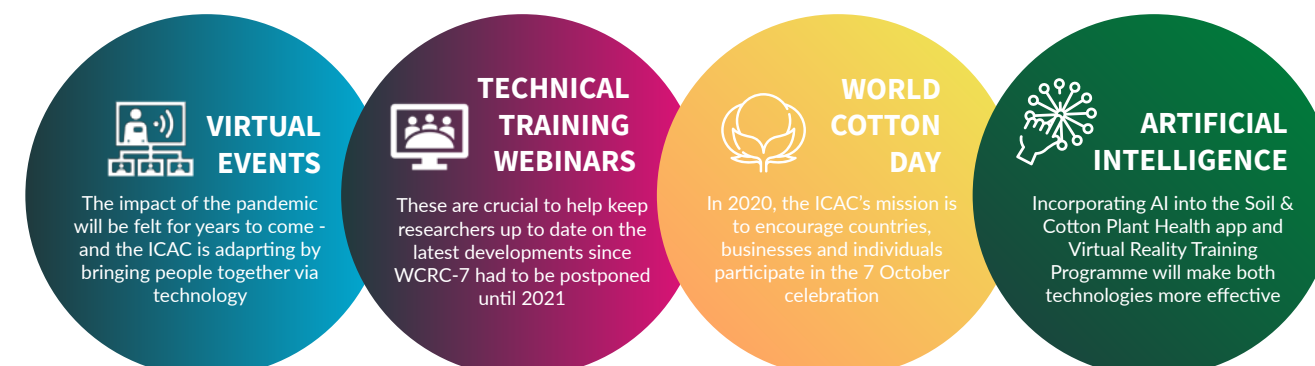
ICAC BY THE NUMBERS

Social Media

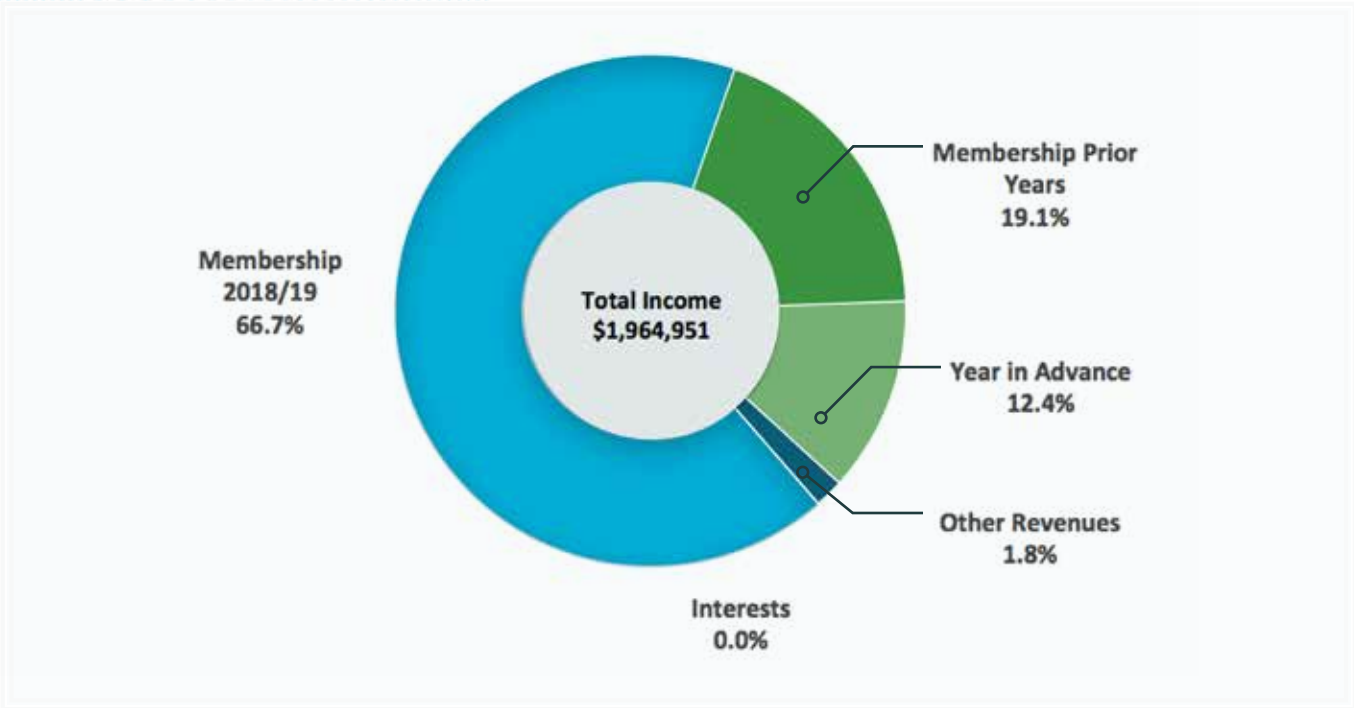
ICAC has engaged in social media in a big way over the last year, establishing a dynamic presence on both Twitter and LinkedIn. Since the accounts were created in the spring of 2018, their influence and following have grown at a rapid pace. In today's fast-paced world, social media is one of the most important tools in our arsenal for keeping the marketplace up to date on ICAC publications, events and news releases – and to raise the visibility of cotton in consumers' consciousness.



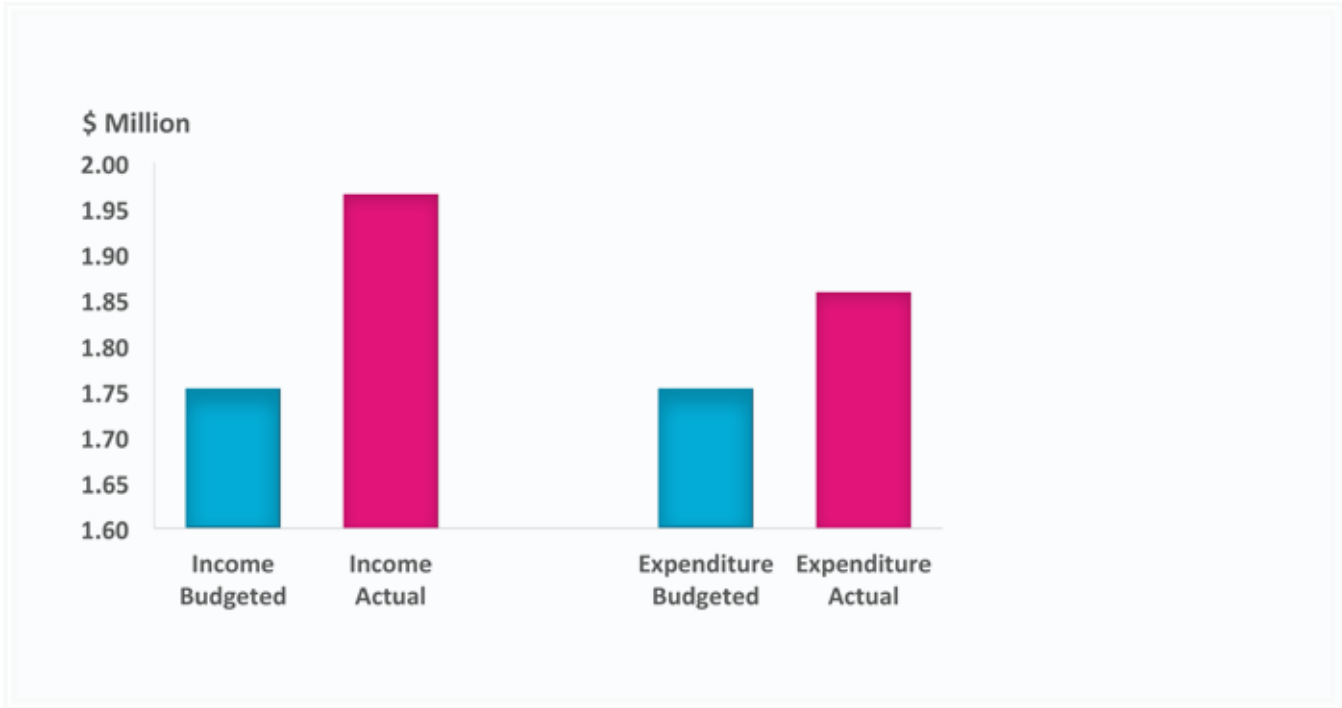
Major New Initiatives & Projects in 2018/19



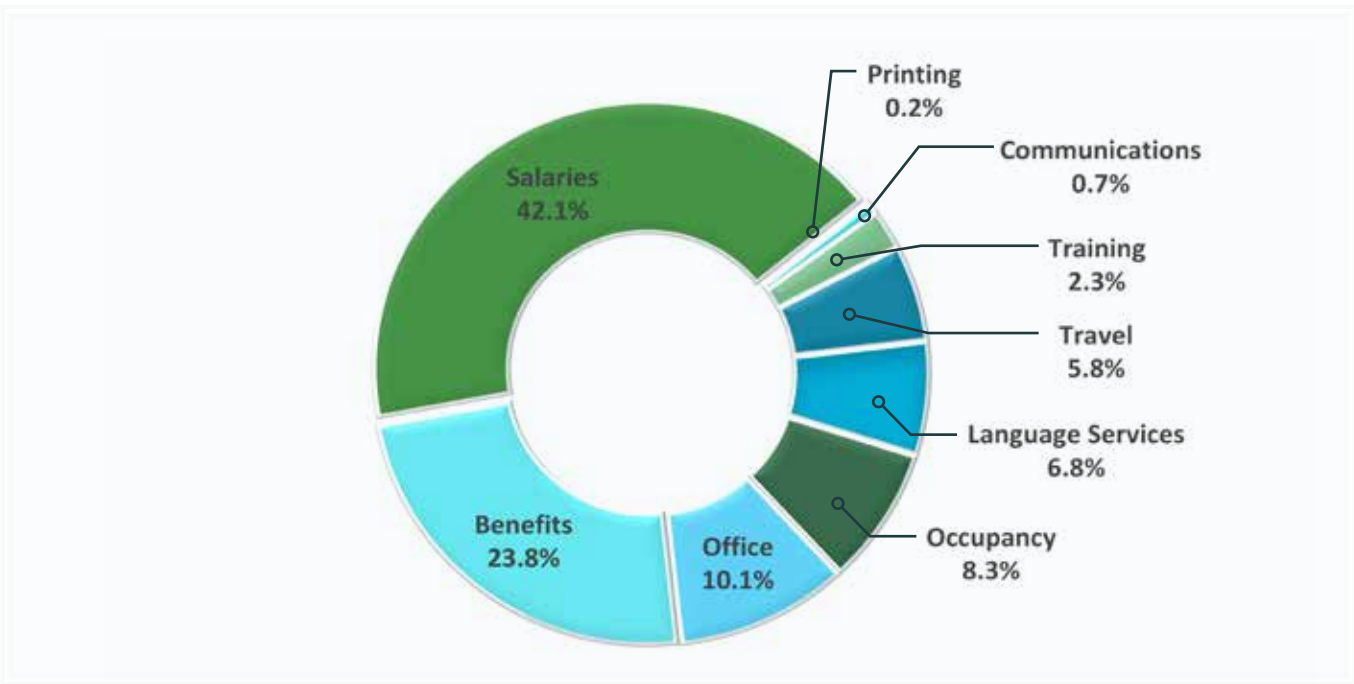
Sources of Income



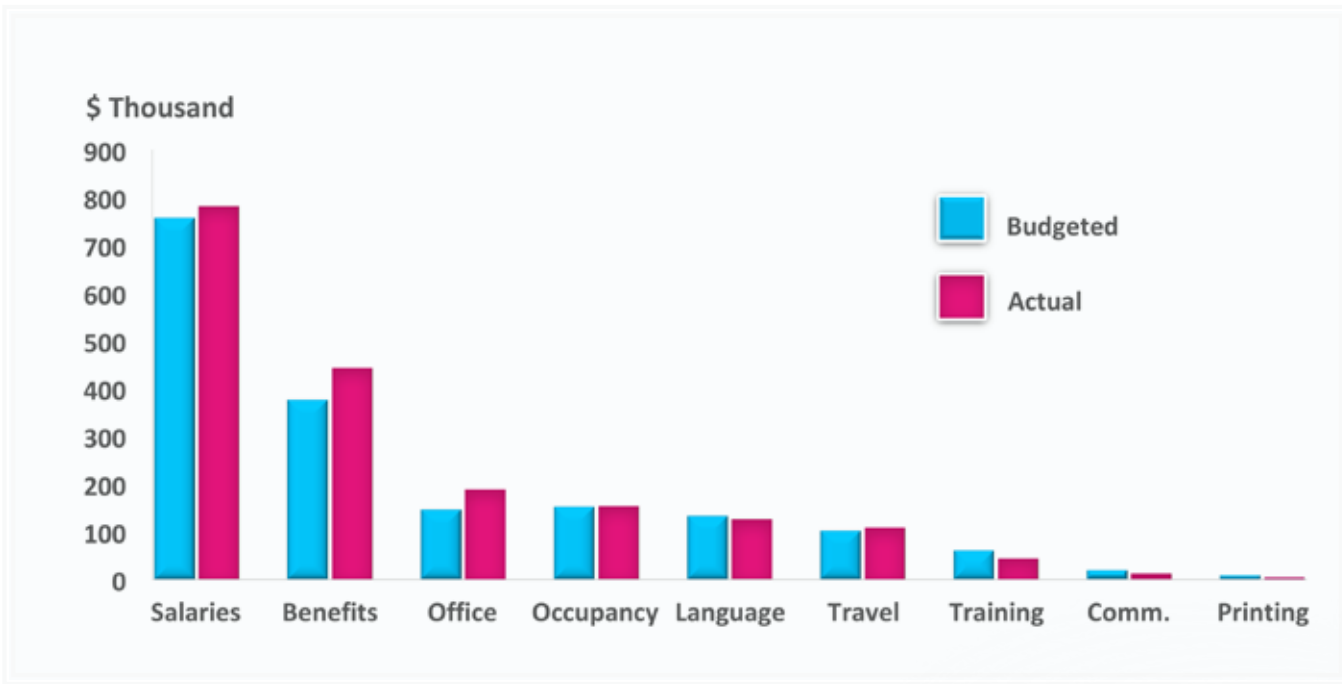
Budgeted vs Actual



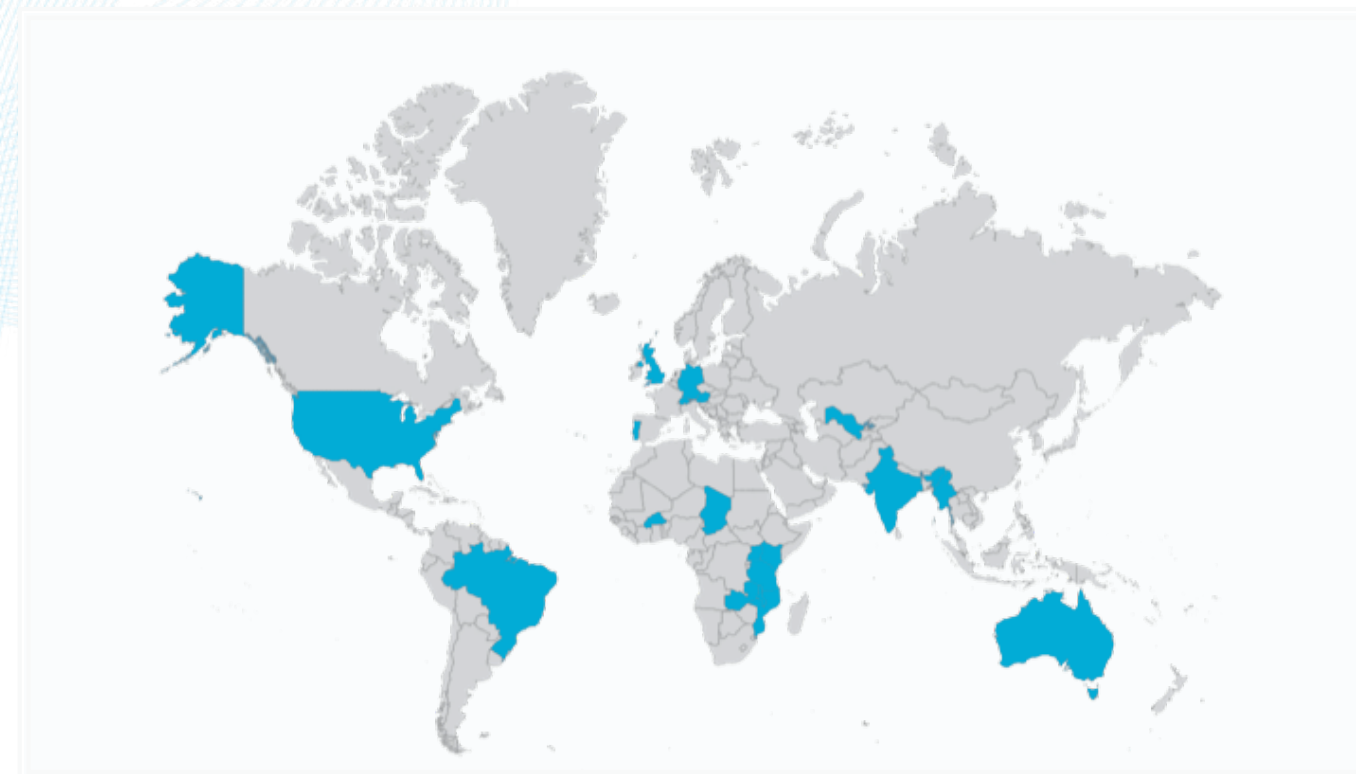
How we spend our money



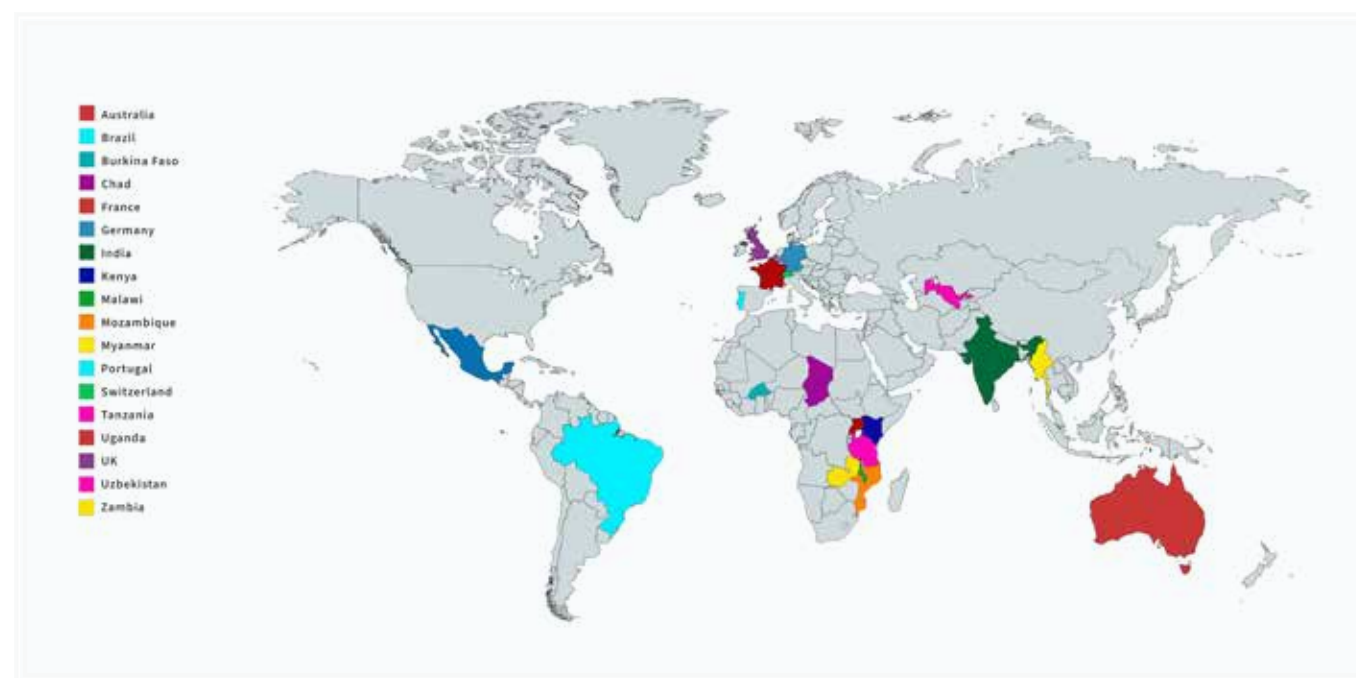
Expenses



ICAC Members



Countries Visited by The Secretariat 2019 -2020



Standing Committee Officers, Delegates and Coordinating Agencies

ICAC Elects New Standing Committee Officers during Plenary Meeting in Brisbane

In 2020, the ICAC changed the structure of its Standing Committee Officers. The concern was that countries often reassign their ambassadors every few years, which means that the Second Vice Chair is often gone before they become Standing Committee Chair, or have to leave during their tenure as Chair. Under the new format, there will be a Chair, a Vice Chair and an Immediate Past Chair. That ensures continuity and also takes advantage of the experience of the Immediate Past Chair, who can help the Chair acclimate to the position.



Selman Kurt

Chair - Turkey

Mr. Kurt is the Commercial Counsellor at the Embassy of Turkey in Washington DC — the same position he previously held at Turkey's Embassy in Kenya. Earlier in his career, he also worked as a Foreign Trade Specialist.



Anshul Sharma

First Vice Chair - India

Anshul Sharma is presently the Counsellor (Economic) at the Embassy of India in Washington DC. In the past, his work touched on a broad array of disciplines, including Commerce, Economic, Consular and Education matters.



Maha Zakaria

Immediate Past Chair - Egypt

Ms. Zakaria serves as the Commercial Counsellor at the Economic and Commercial Office of the Embassy of the Arab Republic of Egypt. She is responsible for the development of the economic and commercial relations between Egypt and the USA.

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It's Been an Action-Packed Year for the PSAP

The larger and more engaged Private Sector Advisory Panel (PSAP) has big plans for 2020/21 and beyond



By Peter Wakefield, CSITC Chair and Managing Director, Wakefield Inspection Services

First and foremost, I would like to give a BIG thank you to the Standing Committee at the ICAC Plenary Meeting in Brisbane in 2019, when the approval was granted to a revised Terms of Reference (TOR) for the Private Sector Advisory Panel (PSAP), plus changes to the methodology of how the PSAP's members are recruited. With the approval of the changes, the membership of the 2019/20 PSAP was increased. Last year, the PSAP consisted of nine

permanent members, six alternate members and three permanent observers.

Now, however, we have 31 permanent members who are very engaged with the ICAC, offering their suggestions during our regular meetings.

The 2019/20 PSAP membership represents a cross-section of virtually the entire cotton value chain – from producers to retailers – as well as a great cross-section of represented member countries.

A New Beginning, Down Under

Your revitalised PSAP commenced the 2019/20 year with a face-to-face meeting in Brisbane where we had more than a dozen PSAP members around a table. In that first meeting, there was agreement to form two dedicated sub-committees:

- A Sub-Committee on Global Cotton Promotion, which is chaired by Bruce Atherly, Executive Director of Cotton Council International (CCI) as Chair.
- A Sub-Committee on ICAC Membership Structure, which is chaired by Jerzy Kotwas of the European Union as Chair.

The very next day, the Sub-Committee on Cotton Promotion met and got started on their work, identifying that the first task of the year is to coordinate the cotton promotion efforts around World Cotton Day, which is held annually on 7 October. This sub-committee has since held several videoconference meetings and produced a wealth of content regarding World Cotton Day, including access to the official logo, ideas for holding their own events, and much more. That information, which is freely available to all, can found on www.icac.org.

COVID has disrupted our face-to-face meetings, yet we remain committed to delivering recommendations from our two sub-committees by November 2020, and in adjusting our plans for events to virtual events.

The sub-group on Membership Structure have been equally busy, and in the various teleconference calls have been debating numerous ideas of how to achieve an increase in the level of Government membership to the ICAC, yet also bring in other associations and interested parties to foster a two way dialog between Member Governments and the entire Cotton Supply Chain. In addition to

membership, the sub-group has been working on methods to increase the financial strength of the ICAC to allow the organisation to better represent Member Governments with strategic initiatives. Obviously COVID-19 is foremost in our minds at this time, and we pray for the minimum disruption to our industry and that all our colleagues worldwide remain safe and well.

This horrible problem has disrupted plans for our face to face meetings, yet the PSAP remains committed to delivering recommendations from our two sub-committees to the Standing Committee by November 2020, and in adjusting our plans for events to virtual events, our meetings to teleconferences.

At this time, our cotton industry is facing unimaginable problems, issues and challenges across the entire value chain, we are looking to make the World Cotton Day one of the levers to help in the recovery process.

This is not a process that one organisation will do alone. If there is a time we need all Governments and the Private Industry to come together and speak with one voice, it is now. Let's make the 2020 World Cotton Day the greatest of COTTON days in our global recovery.

CSITC Has the Proof about the Benefits of Instrument Testing — Now It Needs the Industry’s Confidence

The Committee for Standardised Instrument Testing of Cotton (CSITC) is dedicated to expanding the use of instrument-tested cotton as a trading tool



By Andrew MacDonald, CSITC Chair

Our ‘dream’ for Commercial Standardisation of Instrument Testing of Cotton (CSITC) was to help create a standard for correlating highly sophisticated cotton-testing instruments worldwide — analysing different cottons under different circumstances to accurately define the quality of cotton and all its various characteristics — for cotton production, trading and the spinning industries. This has been achieved and today there is total acceptance that the CSITC system is both realistic and accurate.

However, confidence is still somewhat lacking for the cotton trade to accept the results of grade and staple testing by such instruments as being ‘truly accurate’. That is surprising considering that everybody today relies 100% on the results of the micronaire and strength measurements, the short fibre index and maturity ratio, as well as some other characteristics, all of which are measured by the same instruments.

So why it that we, specifically the trade, tend to shy away from trading under full instrument testing specifications, and still talk about visual grades like Strict Middling, and Good Middling, and estimate manually the staple length measured by hand to 1/32 of an inch? For an outsider this would seem to be absurd, but many still believe these expensive and efficient instruments cannot be trusted.

The explanation for this phenomenon lies in ‘averages’. When cotton is inspected visually and manually, the cotton samples are laid on tables, with special lighting, and the appropriate air conditioning, and then compared firstly by laying together the samples with a similar appearance, and then compared as a block, visually against a standard box. This ‘view’ of, the say 60 samples on the table, is an

average; small variations between samples are not noticed or cannot even be detected. It is the same with staple pulling.

Instrument testing, on the other hand, inspects 100% sample by sample, and establishes each and every slight variation, with such an accuracy that the human eye cannot even detect, and establishes staple length in millimetres — differences undetectable by the human hand.

The cotton trade still lacks the necessary confidence to accept the results of grade and staple testing by instruments as being ‘truly accurate’.

Unfortunately, this means that instruments have tended to complicate, as opposed to simplifying, because cotton is not like a manmade fibre, but is produced by Mother Nature — meaning every seed, field, climate, plant and therefore each boll — will be unique, and therefore every test result with precision instruments will vary slightly sample by sample.

Having established that worldwide testing instruments are capable of delivering accurate ‘commercial’ results with 100% repeatability, CSTIC is now working to use this achievement to encourage a greater expansion of instrument testing based on this understanding of the similarity.

The first step in this direction has been the creation — in collaboration with the International Textile Manufacturing Federation (ITMF) Testing Committee — of a written guide book on how to understand the nature of results originating from instruments.

It emphasises that, just as it is with hand classing, instrument results must be viewed as being an average of the entire lot, rather than based on individual and specific evaluation bale-by-bale on a printed list.

Once the trade and spinners accept this basic principle — that the result of instrument tested cotton is the average of each characteristic in a given lot, rather than picking out one bale at a time, based on its individual instrument class — they will understand that the average will represent the average within each bale. On many occasions if samples are taken from the same bale, each sample will give a slightly different result, by making an average would give a much more accurate real value of the cotton, than just one isolated test.

CSITC is dedicated to expanding the use of instrument-tested cotton as a trading tool, having achieved a highly successful criteria to achieve accurate averaging of cotton’s inherent variations, now is focused on allowing the producers, trade and spinners to benefit from this enormously successful story.



SEEP Teaming Up with Coffee to Develop Sustainability Indicators through the Delta Project

The ultimate goal of the initiative is to expand the indicators to the other agricultural commodities including cocoa, sugar and soy



By Allan Williams, SEEP Chair and Acting General Manager, R&D and Investment, Cotton Research and Development Corporation

The major activity undertaken by the Expert Panel on the Social, Environmental and Economic Performance of Cotton (SEEP) has been the

extensive and in-depth discussion of the 15 indicators put forward by the Delta Project to measure and report progress against the Sustainable Development Goals (SDGs). SEEP provided its technical support to the development of the draft core set and reviewed the indicators during its annual physical meeting held in Brisbane, at the side of the 2019 ICAC Plenary Meeting. While SEEP advised that the precise details of some of the indicators need refining before field testing, SEEP nevertheless endorsed the testing of the 15 draft indicators in 2020 on the understanding that they will be re-evaluated to integrate the feedback from the field pilots before they are finalised.

The draft indicators being developed jointly by the cotton and coffee industries in the Delta Project largely build on the ICAC/FAO framework published in 2015 on 'Measuring Sustainability in Cotton Farming Systems'. They are intended to apply worldwide and have the potential to be expanded to other agricultural commodities, such as cocoa, soy, palm oil and sugar. The partnership with the coffee industry in the development of agreed global sustainability indicators could be a world first for cross-commodity collaboration and will help highlight that the sustainability issues the cotton



industry is responding to are issues for agriculture more generally — they are not specific to cotton. The intention of the project founders is that the indicators be expanded to other agricultural commodities, such as cocoa, soy, palm oil and sugar. ICAC is a partner of the Delta Project together with the Better Cotton Initiative, the Global Coffee Platform and the International Coffee Organisation. The project is funded by the ISEAL Innovation Fund. Building on widely accepted sustainability information principles, the Delta Project aims to align sustainability monitoring and reporting in cotton and coffee to the Sustainable Development

Goals (SDGs). Orienting sustainability measures toward the priorities endorsed and established by the SDGs will enhance the opportunities to adopt a language and a purpose that is shared across the public and private sectors and to forge new partnerships to achieve the common goal of sustainable agriculture.

Potential intended uses of the impact data generated through the implementation of the indicator set include:

- Identification of opportunities to use the sustainability data collected to provide additional value to cotton farmers,
- Upgrading extension and other services to support continuous improvement at farm level,
- National reporting on the commitments set by the SDGs and by the ratification of other relevant international conventions on chemicals, biodiversity and labour rights,
- Evidence-based recommendations to streamline sustainability in agricultural policies, and
- Improve transparency and communication with consumers on the actual value of sustainably produced goods.

We are hopeful that despite the pandemic that a number of pilot tests of the draft indicators will be undertaken during 2020, the results and lessons from which SEEP is looking forward to reviewing, reporting and discussing with the ICAC.

Soil & Cotton Plant Health App and VR Training Evolve by Adding AI Functionality

For an industry still reeling from the pandemic, the fact that ICAC's Virtual Reality Cotton Training Programme and Soil & Cotton Plant Health app continue to evolve and improve is welcome news

Cotton has seen its share of challenges over the years – everything from droughts to floods to pest infestations to fires and more. But the COVID-19 pandemic has paralysed the global cotton supply chain in a way we've never seen before, and there's no real sense of when it will end.

But as it has with every other challenge it's faced in the past, cotton will overcome although the scars from this particular disaster will be long lasting. The supply chain might be largely locked down at press time, but that doesn't mean the industry isn't working hard every day to improve the lives of the hundreds of millions of people around the world who depend on cotton for a living.

The ICAC has spent the last two years developing and refining two technologies that are designed to help small holder farmers, the most vulnerable people in the global cotton industry: the Soil & Cotton Plant Health app and the Virtual Reality (VR) Cotton Training Programme.

Development work has continued even as the cotton trade has been locked down and the technologies have been integrated into the ICAC's newest initiative, 'Four Simple Steps to Sustainability', which is designed to help countries dramatically improve their overall cotton production by boosting yields – in some cases, more than doubling them.



While knowledge and training in best practices is an irreplaceable part of the yield-boosting program, these two technologies provide most of the horsepower.

Smashing the Illiteracy Barrier

ICAC's Soil & Cotton Plant Health app is designed to bring information to the people who need it the most – wherever they are and in whatever language they speak.

The main objective of the Soil & Plant Health app is to help small-holder and illiterate cotton farmers address the immediate disease- and pest-related problems they are actually seeing in their fields and share site-specific practices that rely on global

expertise but are optimised for local conditions. By asking a series of questions and presenting photos of common pests and diseases, the app helps farmers identify and treat their specific issues.

The app is GPS-based and pre-loaded with detailed soil information for all regions where cotton is produced. When launched, the app utilises GPS to determine which language to use (broadly used dialects are used in places where many languages are spoken, which users will understand well enough to change the settings to their preferred language).

But the use of GPS does much more than give the user a head start on the language. The app draws on extensive pre-loaded data of regional soil types, so



as soon as the app knows where the farmer is, it already has a solid understanding of the characteristics of the local soil.

Equipped with data on the local soil and recent weather patterns, the app is able to show the user exactly how the plant should look on that specific day.

And the magic of GPS does even more than that! When the app is launched, it asks the farmer to input the date the crop was sown and then accesses temperature and precipitation results from 'the 60' — a commonly used industry term referring to weather conditions from the preceding 60 days — with an emphasis on the number of heat units accumulated during that period.

Equipped with data on the local soil and recent weather patterns, the app is able to show the user exactly how the plant should look like on that specific day. It literally displays a photo of what the plant should look like at that stage in its growth, given the weather it's experienced in the prior weeks and months. It can even tell the grower approximately how many bolls the plant should have at that moment!

The disease and pest information is handled in a similar way: by using localised knowledge. When the user indicates the potential presence of a disease, the app will show images, one by one, until the photo matches what the farmer sees in his field, and then the troubleshooting process begins. The same process applies to insect pests, displaying various images displayed until the grower finds a match.

The newest upgrade for the app utilises artificial intelligence (AI), which will enable farmers in the field to upload data and photos, increasing the precision

and effectiveness of the advice provided. Rather than scroll through images until the farmers see on the screen the same thing they see in their fields, the AI will allow them to upload photos and identify the exact issue, along with ways to treat the disease or kill the pests (except for beneficial insects, which of course the app would advise to leave alone).

Although it was created with illiterate growers in mind, there is an added benefit for literate users: the ability to print PDFs that include the app's recommendations and final diagnosis. The PDF instructions can be read aloud if the user is illiterate.

VR Training Creates Endless Opportunities

VR is the use of computer technology to create a simulated environment. Unlike traditional user interfaces, VR places the user inside an experience. Instead of viewing a screen in front of them, users are immersed and able to interact with 3D worlds.

By engaging as many senses as possible — hearing, touch, even smell — the computer is transformed into a gatekeeper to this artificial world.

Its most immediately recognisable component is the head-mounted display (HMD). Human beings are visual creatures and display technology is often the single biggest difference between immersive VR systems and traditional user interfaces.

VR can transform the way educational content is delivered; it works on the premise of creating a virtual world — real or imagined — and allows users to interact with it. Being immersed in what you're learning motivates you to fully understand it. It will require less cognitive load to process the information. Standalone headsets can be charged and don't need to be hooked up to a computer, making them ideal for



training in remote areas.

Without question, VR can provide a great experience for farmers, who will be able to walk in a virtual cotton field during different times of the season to experience a variety of farm operations and production practices.

Training programmes on pest and disease management can be conducted any time of the year by walking farmers into fields that are infested with insects and diseases to show them best eco-friendly management practices.

Beyond the field, however, VR could also help entrepreneurs walk into small-scale textile units, enabling them to understand and learn technologies that can help Africa convert cotton fibres into value-added products. VR also can be used as a training programme for key personnel from brands and retailers, allowing them to 'walk through' and understand each link in the cotton supply chain.

Best of all, the cost of viable VR equipment is astonishingly affordable. To be sure, there are cutting-edge headsets that cost thousands of dollars for a single unit, but there are cardboard versions available that utilise a smartphone and only cost a couple of dollars. They don't provide all of the bells and whistles but can get the job done even in the most resource-challenged areas in the world.

The 2019-21 ICAC Communications Plan

For the first time in 2018, ICAC created a multi-pronged, multimedia communications program that raises public, private and governmental awareness of the ICAC’s data, publications, conferences and research capabilities. It is updated and modified annually, as needed.

The plan includes:

- Traditional media such as press releases, ICAC reports and industry publications
- Social media, primarily Twitter and LinkedIn, with plans to introduce a Facebook page in 2021 to highlight Plenary Meetings and major events
- In-person networking at events and conferences — both ICAC’s and those of other organisations that are attended by members of the Secretariat

VIRTUAL MEETING CAPABILITIES

Adapting to COVID-19

Purpose: Continue to disseminate critical industry information without the need to meet in person

Goal: Create a series of virtual sessions to address the industry’s most pressing topics by Nov 2020

Goal: Create monthly technical webinars in place of the postponed WCRC-7

SOCIAL MEDIA

Twitter, LinkedIn

Purpose: Enhanced visibility, a more energised audience, greater engagement and opportunities with partners & private sector

Goal: By 1 January 2019, accumulate 300 Twitter followers and 150 LinkedIn followers (both goals exceeded)

Goal: Triple the number of followers on each platform by September 2020 (goal exceeded)

GLOBAL COTTON PROMOTION

Maximum visibility

Purpose: To ensure ICAC is leading the global effort to increase cotton consumption

Goal: Massive worldwide participation in World Cotton Day 2020

Goal: Regular feedback and contributions from the Private Sector Advisory Panel (PSAP) Promotion Subcommittee to generate new ideas for raising cotton’s visibility

MEMBER OUTREACH AND RECRUITMENT

More is better

Purpose: To maintain all current members, regain former members, and attract new ones, from both cotton-producing and -consuming countries

Goal: Increased revenue and resources for ICAC projects and new staff

Goal: More engagement with the global cotton community; greater diversity among member countries

PLENARY MEETINGS

Seville and beyond

Purpose: To help governments formulate policy that supports a healthy world cotton community

Goal: Increased attendance, both for greater collaboration and increased revenue

Goal: Integrate new technologies and approaches to increase participation through virtual meetings, including the annual Plenary Meeting

USE OF VIDEO

Actions speak louder than words

Purpose: Greater audience engagement by providing content in whatever platform the consumer prefers

Goal: Make highly scientific information more accessible and easier to understand for a non-technical audience

Goal: To put a 'face' on the organiser and ensure we establish and maintain a strong connection to a younger, more digital-savvy population (Achieved – 'Cotton Connects' video series)

ANNUAL REPORT

Accountability and transparency

Purpose: To provide both retroactive and forward-looking information about the operation and performance of the ICAC in advancing its major initiatives

Goal: To ensure ICAC members, partners and stakeholders are well-informed on ICAC past and future activities

Goal: To be transparent about the ICAC's financial health and operational performance

WORLD COTTON DAY

A global celebration

Purpose: To encourage the world to celebrate the most important natural fibre in a variety of highly visible, fun and interactive ways

Goal: Engage and mobilise the global cotton community to plan and execute their own creative and engaging way to recognise and promote cotton

Goal: Develop stronger ties to the private sector and provide global media outlets with many opportunities to report on cotton's critical role in providing income, often in some of the least-developed countries in the world (exceeded in 2019, with massive worldwide participation planned for 2020)

INTERNAL COMMUNICATIONS

Steering and Standing Committees

Purpose: Report on Secretariat travels, activities and impact; keep members informed of how ICAC's budget is being used

Goal: High member retention due to members understanding the value ICAC provides

Goal: Increased participation and feedback from members in ICAC activities and initiatives

AGRICULTURAL AND MAINSTREAM MEDIA

Beyond ICAC publications

Purpose: To increase coverage of ICAC statistics and publications, as well as to establish Secretariat members as global thought leaders

Goal: Increased article placements and use of Secretariat members as sources in articles

Goal: Greater numbers of ICAC citations and references in both scientific and mainstream media

PARTNERING OPPORTUNITIES

Maximising efficiency and impact

Purpose: To bring together resources and expertise from disparate organisations for greater market impact

Goal: Better coordination, a more unified approach to the market, and less redundancy in the efforts of national and global cotton organisations

Goal: Engage partners for the biggest and most important initiatives, including World Cotton Day

Chad Becomes First Country to Take ‘Four Simple Steps to Sustainability’

The word ‘sustainability’ is difficult to define in detail because different people have different ideas of exactly what the word means. Does it mean protecting the environment? Does it mean ensuring there is no forced labour in the supply chain? Ensuring people in cotton earn enough to provide for their families?

Regardless of the position you take, one thing everyone can agree on is that increasing yields – the amount of cotton produced on a given amount of land – is a good thing.

But doubling them is a GREAT thing, and that’s exactly what the ICAC’s Four Simple Steps to Sustainability programme aims to do: increase yields in an eco-friendly way, thus protecting the environment and generating more income for smallholder farmers at the same time.

In August, Chad became the first ICAC member to go through the two-week training regimen, but the process began much earlier. Executive Director Kai Hughes and Head of Technical Information Dr Keshav Kranthi visited the country in February 2020 and conducted a two-day workshop on increasing yields for 20 trainees and technical staff of Olam and CotonTchad. Based on ICAC protocols, Olam has prepared 51 experimental field trials in June 2020: 17 field trials in Chad and 34 more in Cote d’Ivoire.

The training programmes are designed to guide field staff on global best practices to enhance yields in a sustainable manner while also maintaining a low cost of production. The ICAC and Chad were

engaged with the online training from 3-14 August 2020 with 54 trainees (36 from CotonTchad and 18 from SECO Cote d’Ivoire), as well as the core cotton project team from Olam. Sponsored by GIZ, AbTF and CotonTchad/Olam, there were 30 presentations during 10 sessions delivered by 17 international expert presenters.



Topics focused on seed technology, soil testing, soil health, plant health, technologies for high yields, best practices in management of the crop canopy, square retention, boll retention, water, nutrients, weeds, pests, diseases, drought, salinity and climate change.

Cotton Market Report

Limited Cotton Recovery within Pandemic: Production and Stock Levels High, Slow Consumption Growth

Even as the most stringent COVID-19 containment measures begin to be lifted, the opportunity for economic recovery may not relieve current market uncertainty. Countries vary in their ability to flatten the contagion curve and the fiscal space to mitigate the pandemic associated recession. Global production is expected to decrease to 25.1 million tonnes for the 2020/21 season as low prices and food security concerns have led to less planted area in some countries. Global consumption is expected to increase to 24.3 million tonnes, reflecting a 7.2% growth from the previous season.

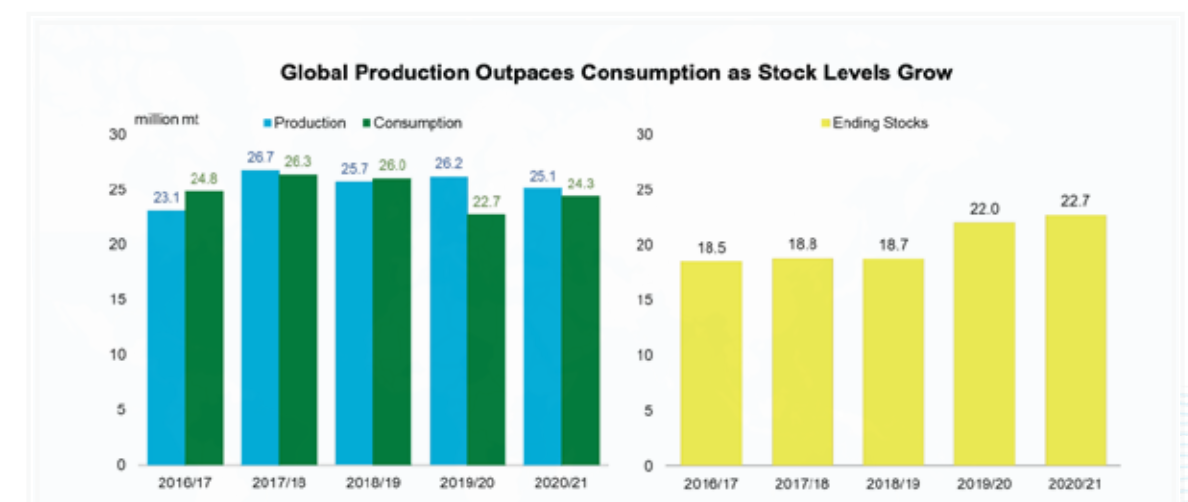
Following near total stoppage of cotton spinning and textile manufacturing in the March-April period of 2020, activity in major consuming countries began to recover in the final months of the 2019/20 season with factories in Vietnam, Bangladesh and India reporting operations near 75% of capacity by July 2020. However, the limited recovery in consumption growth currently projected remains an early estimate that may still be conditional on

economic recovery as countries attempt to contain the pandemic.

At the current global stock-to-use ratio (0.97), the world has enough quantities of cotton lint in storage for nearly one year of mill-use even with no additional production.

Following two seasons of negative growth, global consumption is expected to increase to 24.3 million tonnes in 2020/21.

COVID-19 has presented an additional challenge to the cotton sector that had already been under pressure from long-term decline in use and declining prices since 2018 stemming from global trade tensions. Should projected economic recovery materialise and subsequent demand growth recover, under the current quantities of global reserves, it may still take additional time for prices to recover.



A Look Back at The 78th Plenary Meeting held in Brisbane, Australia

From 2-6 December 2019, the eyes of the cotton world were focussed on Brisbane, Australia, where the ICAC held its 78th Plenary Meeting, with a Technical Tour held the weekend after the Plenary Meeting closed.

There were 307 attendees from 23 Member countries in Brisbane, along with five international organisations and five non-Member countries. One of the most notable changes came on the first day during the Country Reports session. To ensure the reports stayed at their allotted length and focussed on issues of interest, members were asked to submit their written reports in advance, enabling others to read them and be prepared with salient questions. The change in format was greatly appreciated by attendees, who overwhelmingly approved of the more concise and relevant discussions.

The other two Plenary Meeting mainstays — the Technical Seminar and the World Cafe — were also very well-received. The Technical Seminar addressed Traceability Technologies, specifically concluding that governments should have a role in regulating traceability and noted that biosecurity and accurately informing the customers remain important.

The World Cafe, with the theme 'Technology Transfer Platforms for Small Farm Holders in Developing Countries', put the spotlight on two ICAC projects — the Soil and Plant Health app and the Virtual Reality (VR) Cotton Training Programme. One of the most popular sessions dating back to its debut in 2012, the World Cafe is highly anticipated because it is designed to be the most interactive of sessions, with groups of attendees huddling together to provide their own suggestions and solutions to

improve the technologies. Their input was much appreciated and have been integrated into the future development of the app and VR training.

The ICAC accepted an invitation from the European Union to host the 79th Plenary Meeting during the last week of November 2020 in the city of Seville, Spain, but COVID-19 put those plans on hold. The 79th Plenary Meeting will still be held in November in Seville, but has been delayed until 2021 due to safety concerns and the uncertainty that the virus will be under control in the next few months.

Technical Tour to Darlington Downs

The Technical Tour held unusually high interest for attendees last year for several reasons:

- Australian growers have an excellent reputation worldwide for their exceptional water use efficiency,
- Australia regularly finds itself at the top of the list of countries with the highest annual yields, and
- Australia was very far away for most attendees, who wisely decided to extend their stay Down Under after travelling such a long way to get there.

Participants took chartered busses to Darling Downs, a farming region on the western slopes of the Great Dividing Range in southern Queensland. The Tour included a visit to a cotton farm, of course, but also to Australia's renowned Cotton Research and Development Corporation.



Finally, to achieve those high yields Australian growers are famous for, cotton farmers must take advantage of every advancement they can — including the use of drones, which can be used to monitor the crop or, in this case, spread beneficial insects to control pests. On that same farm, participants also watched a completely automated robot patrolling a field, searching for weeds and spraying them with an herbicide.

It was an unforgettable trip for many of the participants, who wisely took advantage of what might be their only opportunity to visit wild and beautiful Australia.

The ICAC extends its sincere gratitude to the local Organising Committee and the government of Australia for hosting the 78th Plenary Meeting. Delegates commented very favourably on the quality of the venue, the efficiency of the preparations, the content of the programme and of course, the warmth of Australian hospitality.

See you in Seville in November 2021!



Below is the Final Statement from the 78th Plenary Meeting in Brisbane, Australia, held 2-6 December 2019 with the theme, ‘Global Leadership: Pushing Cotton’s Boundaries’

1. The International Cotton Advisory Committee (ICAC) met in Brisbane, Australia between 2 – 5 December 2019 for its 78th plenary meeting since the establishment of the committee in 1939. The meeting was attended by 307 persons including representatives from 23 Member governments, 5 international organisations and 5 non-member countries.

2. **Country Reports:** A new methodology to allow for discussion on the individual written Country Statements was introduced. Advance statements had been provided by 14 countries and two international organisations, based on which delegates were able to ask informed questions of each other on specific areas of interest from the Statements. The session achieved increased interactivity among delegates and the Secretariat will continue to examine this methodology at the next Plenary, but with further modifications to improve participation.

3. **Global Megatrends for Cotton:** Seven megatrends were identified as important to the future of the cotton industry. Change and constant innovation will be needed to address these trends shaping agriculture, especially climate change, geopolitical realities and consumer choices. The challenges

should be seen as opportunities requiring intensive research, as well as consumer understanding and engagement.

Change and constant innovation will be needed to address the megatrends shaping agriculture, especially climate change, geopolitical realities and consumer choices.

4. **Technical Seminar — Cotton Traceability Technologies:** Presenters highlighted that consumers are increasingly demanding information on the origin and history of the products, putting pressure on retailers to provide transparency. Traceability technologies are expected to establish authenticity of fibre quality, establish fibre origins, quantify fibre purity and track the processing path from fibre to fabric. While some technologies can trace origins and enable quantification of the fibres in a blend, others add markers to fibres and claim authentic tracking of the marker along the value chain. Implementing traceability technologies carries a cost for businesses. The Plenary discussed whether Governments should have a role in regulating traceability and noted that biosecurity and accurately informing the customers remain important.

5. Report from SEEP: SEEP has reviewed a draft core set of farm-level, outcome/impact indicators (16) to measure and report progress towards the Sustainable Development Goals (SDGs) in the cotton and coffee sectors and it has endorsed the indicator testing planned to take place in 2020. The draft core set was developed as part of the Delta Project and largely builds on the ICAC/FAO framework on 'Measuring Sustainability in cotton farming systems' published in 2015. Orientating sustainability measures towards the priorities endorsed and established by the SDGs will enhance the opportunities to adopt a language and a purpose that is shared across the public and private sectors and to forge new partnerships to achieve the common goal of sustainable agriculture. The indicators will be re-evaluated for their performance after a field test in 2020.



6. Reports from the Secretariat: Consumption drives demand and little growth in cotton consumption is expected in 2019/20 as global economic growth is slowing. Trade barriers and trade disputes have weakened import and export growth and have positioned the global economy into a synchronised economic slowdown that has reduced the pace of manufacturing and investment. Trade disputes create uncertainty for businesses and lower investment activity and trade deals. Quick resolutions are therefore needed to return confidence to the market.

7. ICAC's report on government assistance to the cotton sector in 2018/19: Based on the ICAC report featuring information from 10 countries, assistance to the cotton sector has been estimated at \$5.4 billion in 2018/19, which is a moderate decline from \$5.5 billion in 2017/18. In 2018/19, assistance averaged 16 cents per pound, down from 17 cents per pound.

8. Cost of Production: The cost of production remains a major challenge and the introduction of small-scale machinery and Integrated Pest Management can reduce cultivation costs. The costs and returns of introducing GM seeds should also be carefully examined. To increase yields, major steps should be made to optimise high density planting and canopy management. Governments are encouraged to promote the use of de-linted seeds in suitable climatic regions.

9. Disruptive Technologies: The Committee was informed of studies on fabric microfibre release during laundering, which show that natural-based fabrics released more fibres than polyester. However, cellulose-based materials like cotton biodegrade very rapidly in aerobic aquatic environments when compared to microfibres released by polyester which



biodegrade only over many years and eventually may enter the food chain.

On the circular economy, delegates learnt that even though the circular economy is an economic system aimed at eliminating waste and the continual use of resources, virgin fibres are essential for the system to work, as virgin fibres assist in maintaining the strength and the quality of the final product. On soil health, the Committee was informed about the importance of maintaining soil physical properties; any decline will take considerable time and cost to correct. Healthy soils are the basis of healthy crops and biodiversity enhancement.

10. Germplasm Exchange: Extensive plant breeding efforts and selection for desired traits have resulted in narrowed genetic diversity due to the loss of several traits in the commercial varieties. Therefore,

there is a need to explore the diversity of germplasm by investing more in cotton breeding. Germplasm exchange is low due to a lack of information and also a lack of means and capabilities of breeding teams to address and integrate genetic variability into breeding programs, notably in developing countries. ICRA is proposing to set up an international forum for germplasm exchange. It was emphasised that germplasm evaluation and exchange was important and there was a need to enrich collections continuously by applying novel methods for cotton improvement while considering countries' seed breeding policies. Germplasm improvement could greatly benefit from activities such as sharing knowledge and technologies, wider international collaboration, training and education of new generation cotton scientists and increasing investments to expedite the commercialisation of new technologies.

11. Responding to Climate Change: Climate change impacts vary around the world and may result in reduced water availability, higher potential water use, increased incidents of extreme weather events and changes to the distribution of pests and diseases. Strategies to adapt to these changes should include international cooperation for increasing yields, improving production efficiencies and adaptive management focused on cotton productivity. To improve yields, the Committee was informed that there needs to be an improvement in crop resilience to stress, efficient water usage and soil health. The Committee therefore urges governments to encourage the development of climate-resilient cultivars with high water- and nutrient-use efficiencies with the potential to adapt and withstand unpredictable drought, changes in heat, waterlogging, increased insect pests and diseases. It also recommends that heat tolerant varieties be developed and that active stress management and

optimised growth regulators be used in climate changing conditions. In addition, regionally specific assessments, systems-based approaches and transgenic/digital technologies will be vital. It is recommended that governments evaluate the possibility of introducing an effective and accurate information system for the growers.

Some participants suggested that there is a need to develop policies for national/regional organic cotton production.

12. Breeding and Producing High-Yielding and High-Quality Cotton Planting Seed: New cultivars can address production constraints, improve yield and fibre quality, and be targeted for each production region. New cultivars will not solve some major production issues. These need to be addressed by changes in soil and crop management. Successful



breeding programs require stringent processes for production and quality assurance to meet the enormous potential. Increased sharing of information from existing germplasm collections around the world are needed to address the challenges and opportunities.

13. Insect and Weed Resistance Management: Two key factors in the success of resistance management plans in both weeds and insect management are that plans are supported by science, and second, that stewardship is supported by an industry extension and communication program. Insects in particular do not recognise borders and area-wide management is very important. The Committee received information on a commercial-based trap that can be used to detect and conduct real-time monitoring of fruit flies in a rapid 2-3 day loop. The case studies highlight that innovation in digital technology is removing barriers and new products are being developed that may facilitate long-term suppression of pest populations.

14. World Café – Technology Transfer Platforms for Small Farm Holders in Developing Countries: The Committee conducted a World Café conversation on two innovative technology projects: Virtual Reality Cotton Training and a Soil & Plant Health Digital Application (App). Virtual Reality holds great potential for use throughout the cotton supply chain.

The Soil & Plant Health App is intended to assist in increasing yields, especially for smallholder farmers with little or no literacy. Delegates shared their opinions on future areas for development, discussed possible organisations as partners, and cotton-focussed technologies that the Secretariat should consider for development. The Committee encourages the future development of innovative projects that benefit small farm holders particularly in Africa and Asia.

15. Steering Committee: The Mission, Vision and Values proposed by the Standing Committee were approved and adopted by the Committee. The Committee noted the Statement Paper reviewed and approved by the Private Sector Advisory Panel (PSAP).

16. Topic of 2020 Technical Seminar: The Committee decided to hold the 2020 Technical Seminar on the topic of, 'Advances and Challenges of Hybrid Cotton Technology'.

17. Topic of 2020 PSAP Presentation: Topic suggested by the PSAP for the 2020 Plenary Meeting is 'Informational Labelling of Textile Products'.

18. Future Plenary Meeting: The Committee has accepted an invitation from the European Union to host the 79th Plenary Meeting during the last week of November 2020 in the city of Seville, Spain.

19. Appreciation to the Host Country: The Committee thanks the people, the organising committee and the government of Australia for hosting the 78th Plenary Meeting. Delegates commented very favourably on the quality of the venue, the efficiency of the preparations, the content of the programme and of course, the warmth of the Australian hospitality.



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