



INTERNATIONAL  
COTTON  
ADVISORY  
COMMITTEE

# VALUE PROPOSITION

2024



COTTON  
FOR GOOD™





# Mission

To serve the cotton and textile community through promotion, knowledge sharing, innovation, partnerships and providing a forum for discussion of cotton issues of international significance.

# Vision

**Prosperity** through a  
**Sustainable** cotton industry

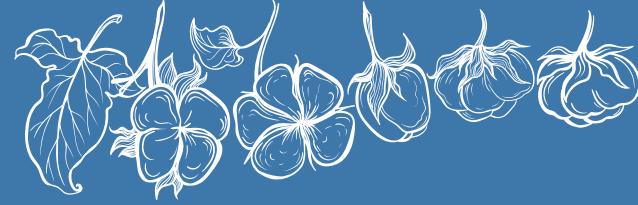


# About us

The ICAC is an organization of member governments with an interest in cotton and the textile value chain. Formed in 1939, it is the only intergovernmental body for cotton producing, consuming, trading, and investing countries, and is one of only seven International Commodity Bodies recognized by the United Nations.

There are currently 10 members of the Secretariat originating from seven different countries – Colombia, France, India, Morocco, Pakistan, Russia, and the USA.

The organization was formed by governments to deal with technical, statistical, and policy matters related to cotton, and now the entire supply chain including textiles manufacturing, brands, and retailers.



# What the ICAC does

The ICAC is the premier source of international data on the global cotton industry. The Secretariat forecasts cotton supply, demand, and prices; estimates cotton supply by type; and tracks exports by destination and imports by origin. It is the primary cotton data source for other international organizations including the Food and Agriculture Organization (FAO) and the World Trade Organization (WTO).

But the ICAC is about a lot more than publications and statistics! The organization has become much more dynamic in recent years:

- Developing cutting-edge technologies (talking app, Virtual Reality)
- Improving the lives of millions through agricultural development
- Defending cotton against myths and disinformation
- Representing all sectors of the global cotton textile value chain
- Training farmers on regenerative ag techniques
- Advocating for cotton in regulations and legislation, and much more.





# ICAC BY THE NUMBERS

Given the global reach of the ICAC and its extensive work throughout the cotton-textile value chain, it can sometimes be difficult to grasp just how impactful and influential our combined Members are. Below are multiple data points that help put the impact and effectiveness of the ICAC into context.

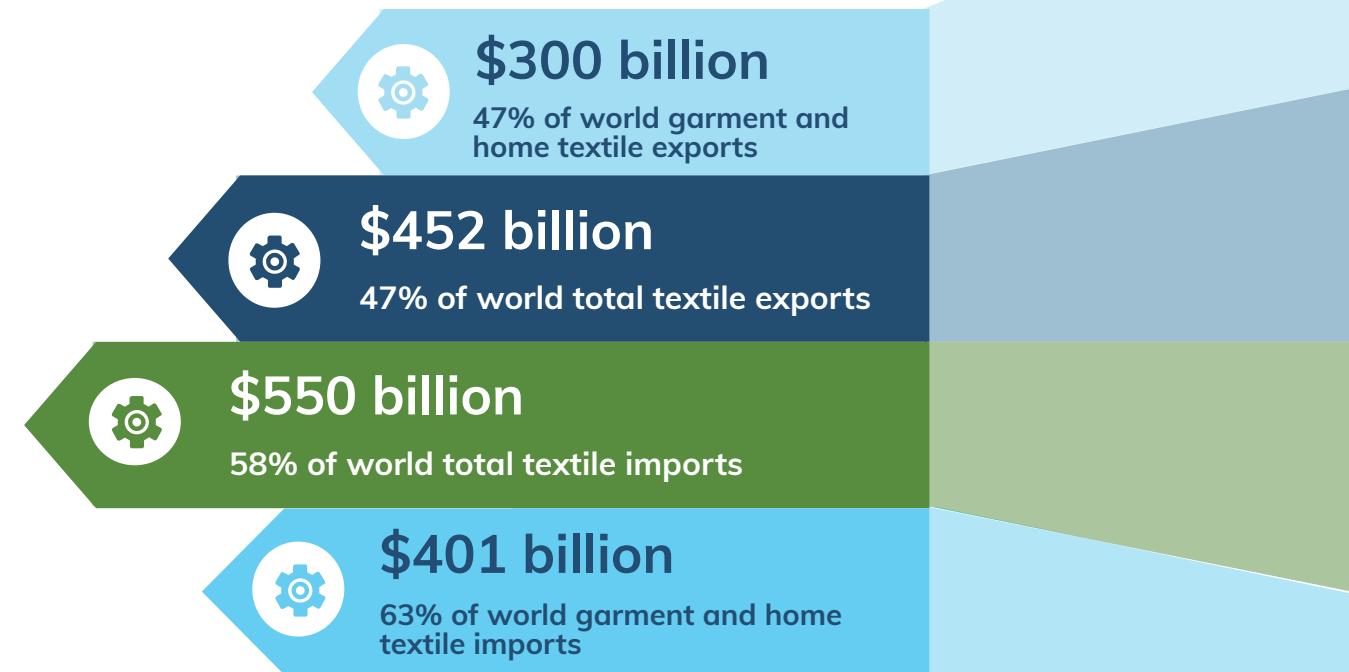
ICAC Members' economic share/contribution to world totals:



# Textiles

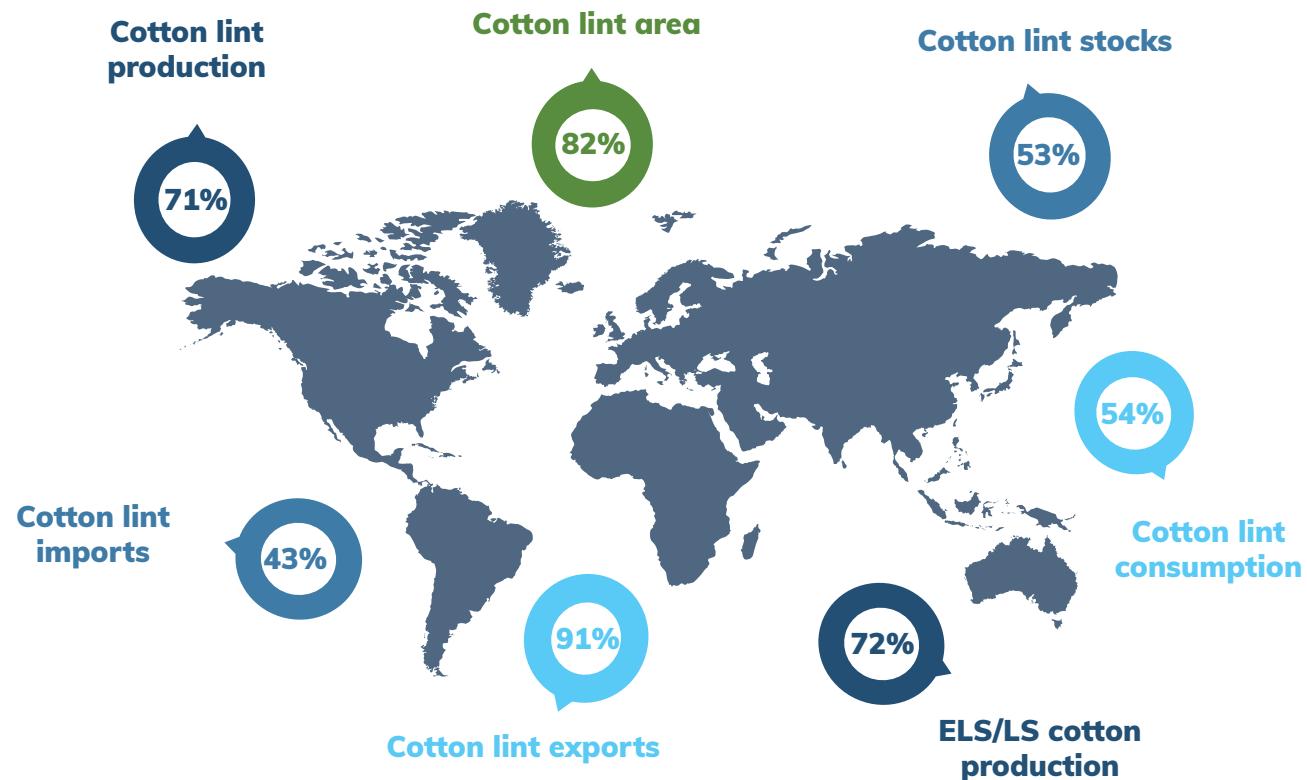
The United Nations has recognized the ICAC as the intergovernmental commodity body representing the global cotton industry, including textiles and other cotton-based products.

ICAC Members' textiles share/contribution to the world totals:



# Production and Consumption

Globally, ICAC Members represent:



## 30, 81, 157, 35

Those numbers represent the success of the Committee on the Commercial Standardization of Instrument Testing of Cotton (CSITC), which seeks to ensure that both buyers and sellers get the true value of the cotton they're trading. That reduces the number of arbitrations and claims filed, saving all industry stakeholders both time and money. The numbers above represent:



The number of countries whose labs have participated in Round Trials

The number of participating laboratories worldwide

The number of individual instruments tested

The % reduction of interlaboratory variation since the initiative launched in 2007



That's the percentage of sectors in the global cotton textile value chain represented in the Private Sector Advisory Council (PSAC). It provides a crucial link between businesses and the policy makers in Member governments.



**75**  
**A Groundbreaking Report**



The SEEP panel has focused on many issues of importance over the years, but this 75-page report provides an in-depth primer that concisely explains each practice, the science behind the practice, and importantly, the benefits, risks, and research needed to facilitate adoption.

**2,100**

That is the approximate number of cotton scientists in the ICAC's vast, globe-spanning group of research networks. It is the position of the ICAC that research is the lifeblood of cotton, always striving to increase yields, improve quality characteristics, and make cotton more resistant to pests, diseases, and the impacts of climate change. That is why the ICAC has established multiple regional networks: to facilitate communication between scientists and ensure that ICAC Members have access to the most cutting-edge cotton research.

The International Cotton Researchers Association (ICRA)

Latin American Association for Cotton Research and Development (ALIDA)

Asian Cotton Research and Development Network (ACRDN)



Interregional Cooperative Network on Cotton for the Mediterranean and Middle East Regions

Southern and Eastern African Cotton Forum (SEACF)

Cooperation in Africa hosted by the African Cotton Association





## BENEFITS TO MEMBERS

- 1** **Increased access to statistics and critical technical information** provided by the Secretariat at no charge. The subscriptions to our publications and data would cost thousands of dollars if purchased separately.
- 2** **Engagement in cotton, textile, and related projects involving the ICAC.** There are multiple projects underway right now, all of which are designed to raise yields, improve sustainability, support the textile sector, and boost incomes and efficiency of the cotton supply chain.
- 3** **Assistance when and where cotton needs it.** If a Member has a problem, such as a new disease or pest, the ICAC will respond. The ICAC's voice-based app for illiterate farmers, a four-step regimen for increasing yields, and a VR training program, are made available to Member governments at no cost.
- 4** **Enhanced participation in collaborative interactions in the ICAC's global network on cotton research and development.** There are thousands of scientists in the ICAC's global research network, and their work is used to benefit all ICAC Member governments.

5

**Supporting cotton's efforts toward sustainability.** "Sustainability" is more than a modern buzzword – it's the only way we can manage the planet's growing population and static (if not dwindling) natural resources. The ICAC is extremely active in all aspects to cotton's sustainability journey, from evaluating transparency and traceability technologies, to educating brands about cotton, to ensuring that small holder farmers are not left behind.

6

**A unified voice for the entire supply chain.** The ICAC is the only intergovernmental commodity body that is recognized by the United Nations to cover the entire cotton industry from farm to customer, so the Secretariat has members with expertise in all sectors of the supply chain.

7

**Extensive collaboration with the private sector.** In 2021, the ICAC started its Private Sector Advisory Council, which is made up of national, regional, and global organizations to facilitate interaction between Member governments and the private sector. Since its launch, the PSAC is the only organization in the world that draws representation from every sector of the cotton value chain on the same platform.

8

**Increasing cotton's climate resilience.** This is a primary focus for many – if not most – of the ICAC's on-the-ground projects. For example, as part of the GIZ-funded "i4Ag Innovations for Climate Resilience" project being conducted in Cameroon, the ICAC is providing hands-on training to more than 40,000 small holder cotton farmers.

9

**Facilitating the development of cotton textile infrastructure in countries that currently only export their fiber.** Exporting raw fiber adds money to a country's banks, but it doesn't provide nearly as much value as processing the fiber and exporting finished goods does. The ICAC is directly working with cotton-exporting countries to maximize the value of the cotton they produce.



# TECHNICAL EXCELLENCE



*The Technical Information Section (TIS)* addresses key issues confronting cotton farming and cotton processing by collating and synthesizing scientific knowledge accrued from global experiences. It coordinates the World Cotton Research Conferences that are held once every four years. Additionally, it conducts four regional cooperative network meetings of Africa, Asia, Latin America, and the Mediterranean region once every two years. The TIS produces the quarterly scientific magazine the ICAC Recorder, the annual Cotton Data Book, books and bulletins to apprise all stakeholders of current issues, and other events to highlight latest technological advances in R&D. In addition, the TIS conducts analytical research on global trends in the sustainable use of water and agrochemical inputs to identify and highlight core areas in specific Member countries for improvement in sustainability. The Sec-

retariat has kept abreast of new developments in production research, including organic cotton production, transgenic cotton, developments in fiber testing equipment, and evolving textile innovations.

*The ICAC is involved in the development of innovative projects* designed to assist farmers, particularly small farm holders and to increase yields. These include the development of a ICAC Cotton Expert App and Virtual Reality training programs. It has also launched a global cotton initiative in conjunction with the WTO, FAO, ITC, UNCTAD, and UNIDO called “World Cotton Day.” The global response to the initiative has been so positive that the United Nations has reserved October 7 of each year as World Cotton Day on its permanent calendar.





## Value for the Textile Industry

The textile industry has witnessed a substantial transformation as the global trade has increasingly shifted from raw materials to finished products. The world textiles trade, which stood at \$429 billion in 2003, escalated to \$958 billion in 2022, demonstrating a Compound Annual Growth Rate (CAGR) of 4.31%. Concurrently, the global apparel market itself has surged to \$1.530 trillion. These figures illustrate a significant evolution in textiles and apparel market dynamics, underscoring the increased significance of finished textile products in international trade.

The appointment of Mr Kanwar Usman as the first ever Head of Textiles in late 2021 reflects this shifting focus and emphasizes ICAC's commitment to addressing these evolving market dynamics.

“Our vision is to connect the core textiles value chain—including cotton, ginning, spinning, weaving/knitting, processing, stitching, brands, and retailers—to the allied textile industry. This encompasses machinery manufacturers, dyes and chemicals, and accessories – along with the services sector, which includes financial institutions, donor agencies, compliance organizations, and testing laboratories – and, last but not least, academia, ensuring a comprehensive and interconnected industry ecosystem.

“In light of climate change and social regulations emerging in many countries, with an increased focus on sustainability by our Member countries, there is an anticipated shift in textiles sourcing. This shift presents a significant opportunity for the ICAC and its Members. We will be working closely with Member governments to fully leverage this shift in our favor, ensuring that our strategies align with global sustainability trends and market demands.”

– ICAC Head of Textiles, Mr Kanwar Usman





# ICAC Committees

The ICAC has several committees and working groups exploring areas of interest to both producing and consuming countries. These include:

1

***The ICAC Committee on Commercial Standardization of Instrument Testing of Cotton (CSITC)*** serves as the basis for international cooperation among cotton testing laboratories. Round Trials organized by the CSITC encourage standardization in cotton instrument testing, help participating cotton testing centers to improve, and ensure that their results are on the same level as other testing centers around the world.



2

***The ICAC Expert Panel on Social, Environmental, and Economic Performance of Cotton Production (SEEP)*** works to provide information about the impacts of cotton production and recommends policies and practices to governments for improvement. While this committee has primarily looked at sustainability issues and is currently engaged in developing a global sustainability index recognized by all governments, the work of this committee will now also move toward traceability and reaching agreement on what traceability should measure.

3

***The ICAC Private Sector Advisory Council (PSAC)*** is a panel of leading experts from the private sector covering farmers, spinners, merchants, private sector organizations such as Better Cotton and retailers. They advise and help governments in reaching their policy decisions. Currently, the ICAC sits on the International Advisory Group for the implementation of an e-Phyto certification system and liaises extensively with private sector companies to ensure that the system is both efficient and practical.



## Sustainability

The Four Steps to Sustainable High Yields training program seeks to double smallholders' seed cotton yield in three years without significantly increasing the cost of cultivation, as well as to teach farmers to reduce contamination through clean cotton-picking techniques, thus increasing the market value of their seed-cotton.



## Virtual Reality

VR can transform the way educational content is delivered; it works on the premise of creating a virtual world and allows users to interact with it. Training programs 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 the best eco-friendly management practices.



## Voice-based App

The ICAC Cotton Expert app is designed for farmers with little or no literacy. Empowered with artificial intelligence, it enables smallholders to take and upload photos of insects or potentially diseased cotton plants. The AI identifies the insect or possible disease and provides step-by-step guidance on how to remedy them.

## Regen Ag

The ICAC is conducting training on regenerative agriculture techniques throughout Africa, including Burkina Faso, Cameroon, Chad, Cote d'Ivoire, Mozambique, Tanzania. The effort includes hundreds of farm demonstrations, videos, training manuals, virtual training programs, and more. A critical part of the training is techniques that raise yields and increase farmer profitability.



## High Yields

Increasing yields is a crucial part of many ICAC interventions and projects – direct farmer training; train-the-trainer programs; the creation of training manuals and videos; and much more. The techniques taught are customized to local weather trends, soil types, and varieties in use, and frequently make use of ICAC technologies including the app and virtual reality training.



## i4Ag Resilience

This \$3 million+ project is a collaboration between the ICAC and CIRAD, France; IRAD & SodeCoton, Cameroon; CNRA, ESA, Olam & Ivoire Coton, Cote d'Ivoire; and is funded by GIZ. The project aims to introduce climate-resilient innovations to rainfed small holder cotton farms in Africa, where 95% of farms are vulnerable to climate change.





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