



# **International Cotton Advisory Committee**

**Provisional Minutes**

**83rd ICAC Plenary Meeting**

**March 23-24, 2026  
Bremen Parliament Building  
Bremen, Germany**





## 83<sup>rd</sup> ICAC Plenary Meeting

### MINUTES

#### 2<sup>nd</sup> Plenary Session: Government Reports

10:30 am to 12:30 pm, Monday, March 23, 2026

The Chair opened the session at 10:30 am by noting that one of the features that makes the ICAC Plenary unique is the direct involvement of member governments. He explained that statements would generally be delivered in alphabetical order, with some delegations presenting in person and others via Zoom. Out of deference to Tanzania's recent support for the ICAC Plenary in 2025, Tanzania was invited to speak first.

#### Tanzania

Mr Marco Mtunga, speaking on behalf of the Government of Tanzania, thanked the Federal Government of Germany for agreeing to host the 83rd Plenary Meeting of ICAC at short notice after Tanzania encountered security concerns. He formally apologized to delegates for the inconvenience caused by the change in venue.

Turning to Tanzania's cotton sector, Mr Mtunga said cotton remains an important crop and source of livelihood for more than 600,000 farmers. He reported that production in the 2025/26 marketing season reached about 84,000 tons. He stressed, however, that one of the major challenges facing Tanzania, and Africa more broadly, is low productivity, noting that lint yields remain far below the world average.

He outlined several initiatives Tanzania is taking to improve productivity, including:

- Revamping the seed multiplication system
- Installing new delinting capacity and moving away from mechanical delinting
- Incorporating germplasm obtained from Pakistan into local breeding programs to improve resistance to jassid and other sucking pests

- Expanding farmer training and extension services
- Supporting soil fertility improvements, including biochar and bokashi preparation, in collaboration with the International Trade Centre
- Advancing work on organo-mineral fertilizer, including plans to establish production capacity

Mr Mtunga also reported that around 1,000 extension officers had been engaged to support cotton farmers. On value addition, he welcomed ICAC's textile-related initiatives and confirmed Tanzania's intention to participate in the Global Cotton and Textiles Investment Summit in Uzbekistan.

He appealed for stronger ICAC engagement with the African Cotton Association (ACA) and the Eastern and Southern Africa Cotton Organization (ESACO) in order to encourage more African countries to rejoin ICAC. He added that Tanzania expects to produce about 114,000 tons in 2026/27.

In closing, Mr Mtunga noted that this would be his final Plenary Meeting before retirement and called on member countries to remain united and make ICAC stronger in defending cotton against competing fibers.

The presentation over, the Chair thanked Mr Mtunga for his many years of service to cotton and for Tanzania's support for ICAC.

## **Australia**

Mr Peter Creaser, Minister-Counsellor for Agriculture to the European Union, spoke on behalf of Australia and conveyed apologies from Mr Allan Williams, CEO of the Cotton Research and Development Corporation, who was unable to attend.

He emphasized that Australia values ICAC as the only global intergovernmental forum dedicated to cotton and remains committed to constructive engagement, evidence-based policy dialogue, and support for a sustainable and resilient global cotton sector.

Mr Creaser structured his remarks around three themes: production and market outlook; sustainability and responsible production; and innovation and research and development.

On production and markets, he reported that:

- Australian cotton export volumes in 2026/27 are expected to remain strong at around 1 million tons, still above the ten-year average
- Production is forecast to ease by 7% in 2026/27, reflecting smaller planted areas and uneven rainfall
- The gross value of Australian cotton production is forecast at 2.2 billion in 2026/27
- The value of cotton exports is forecast at 2.8 billion in 2026/27

- Cotton production in 2026/27 is still expected to remain above the ten-year average

He noted that Australia remains one of the world's largest exporters of raw cotton, with more than 99% of production exported, and identified major markets including Vietnam, China, Indonesia, Bangladesh, and India.

On sustainability, Mr Creaser highlighted Australia's myBMP (Best Management Practices) system and the Planet. People. Paddock. sustainability framework, which together support traceability, water efficiency, soil health, emissions reduction, and broader environmental stewardship. He noted that Australian growers have nearly doubled the amount of cotton produced per megaliter of water over the past thirty years.

On innovation, he described Australia's investment in precision irrigation, automation, soil mapping, and water recycling systems, supported through the Cotton Research and Development Corporation and the Australian Government.

## **Brazil**

The delegation of Brazil reaffirmed its commitment to ICAC as a key forum for dialogue and cooperation and emphasized Brazil's willingness to deepen cooperation, particularly in promoting demand for cotton, which it described as the sector's most important issue.

The delegation reported that Brazil had planted around 2 million hectares of cotton and expects production of around 3.8 million tons, with productivity at approximately 1.9 tons per hectare. About 20% of production is processed domestically, with the remainder exported.

Brazil stressed that its cotton farmers are leaders in the adoption of regenerative practices. It highlighted:

- Widespread use of no-tillage;
- The prevalence of double-cropping systems, especially cotton following soybeans;
- The national Bioinputs Program, established in 2020, to promote seeds, fertilizers, inoculants, biostimulants, and biopesticides;
- The role of cotton farmers as leaders in regenerative agriculture and bioinput use.

The delegation argued that environmental sustainability can position cotton more favorably vis-à-vis synthetic fibers and stressed the importance of using that advantage.

On trade, Brazil called for continued cooperative efforts to promote global cotton demand and avoid trade barriers, which it said are especially harmful to less-developed countries.

The delegation concluded by reiterating its commitment to working collaboratively within ICAC and welcomed the nomination of its representative, Mr Igor Morais, as the incoming Vice Chair of the Standing Committee.

## **Côte d’Ivoire**

The delegation of Côte d’Ivoire stated that cotton remains the country’s fifth largest agricultural export in value terms, after cocoa, cashew, natural rubber, and palm oil, and supports more than 100,000 farming families in the north-central regions

It recalled that the 2017/18 crop season marked the implementation of a major reform following liberalization, based on agro-industrial zoning of cotton-producing areas among six ginning companies. According to the delegation, the reform revived cotton production, which reached nearly 225,000 tons of fiber in 2020/21, and renewed producer interest.

The delegation noted, however, that the 2025/26 season marked the fourth consecutive year of stagnation, with jassid infestation having reduced production by around 6%. In response, the government has instructed the Cotton and Cashew Council to work with stakeholders on a recovery plan for 2026–2030, aiming to reach 250,000 tons of cotton fiber by 2030.

This recovery plan is also expected to include revitalization of the textile industry, with the government seeking to increase the share of locally processed cotton fiber from less than 2% today to more than 10% by 2030.

The delegation emphasized that ICAC’s contribution is essential to this objective and congratulated the Executive Director and Secretariat for pursuing concrete and innovative solutions to improve yields, combat cotton diseases, and rebuild the link between cotton production and the textile industry.

## **European Union**

The delegation of the European Union addressed three perspectives: the EU as a cotton producer; as a financial partner in Africa supporting sustainable cotton; and as the world’s leading importer of textiles.

On production, the EU noted that cotton production is concentrated in Greece and Spain, and that more than 75% of EU cotton production is now organic, including integrated pest management, with no GMO varieties used. It highlighted the role of the European Cotton Alliance (ECA) and the newly established EU Cotton collective mark as examples of strong sector governance.

The delegation said the biggest challenge facing EU cotton production is resilience against extreme weather conditions, especially drought, noting that around 90% of cotton area in Greece and Spain is irrigated.

On development cooperation, the EU underlined that it and its member states are major financial partners for sustainable cotton production in Africa, especially in the C4 countries, and intend to continue under the Global Gateway strategy. It referred to support for environmental sustainability, resilience, innovative finance, and local value chain development, including the i4Ag project in Cameroon implemented by ICAC and CIRAD with support from Germany's GIZ.

On the textile value chain, the EU noted that it remains the world's largest importer of textiles, accounting for 43% of global import value. It stressed the EU's focus on sustainability, labor and human rights, traceability, transparency, and data. The delegation argued that ICAC should serve as a multilateral forum for discussing these issues collectively.

In closing, the EU reiterated its support for sustainable cotton production and consumption and its wish to intensify joint learning, especially with regard to Africa's cotton sectors.

## **Egypt**

Ms Retiba Mahmoud, Chairperson of the Egyptian Cotton Exporters Association (ALCOTEXA), delivered the statement on behalf of the Arab Republic of Egypt.

She began by thanking the International Cotton Advisory Committee (ICAC), the Bremen Cotton Exchange, and the organizing committee for convening the meeting. She noted that Egypt is one of the founding members of ICAC, having joined in 1939.

Ms Mahmoud reported that Egyptian cotton is currently undergoing a period of improvement, with enhanced spinning characteristics and increased yields per acre, despite the challenges posed by climate change. She attributed this progress to government policies that have positively impacted the cotton sector.

She highlighted that Egypt has begun cultivating organic cotton, produced without the use of pesticides, as part of broader efforts to enhance sustainability. She also noted strong export performance, with exports reaching nearly 75% of total production, and projected that this could rise to 95% by the end of the current season.

Ms Mahmoud further indicated that, supported by these positive trends, the cultivated area for cotton is expected to increase by approximately 40% compared to the previous season. As a result, production is projected to reach around 90,000 tons in the upcoming season.

She concluded by reaffirming Egypt's commitment to sustainability and expressing appreciation to all participants and stakeholders in the global cotton industry.

## India

Ms Padmini Singla, Joint Secretary for Natural Fibres in the Ministry of Textiles, presented India's cotton economy as one defined by scale, sustainability, and global leadership.

She reported that India remains one of the world's largest cotton producers, with estimated output of 4.95 million metric tonnes in 2025/26, accounting for nearly 19% of global production, and the largest cotton-growing area in the world at 11.48 million hectares, or about 38% of global cotton area.

She emphasized that cotton engages nearly 6 million farmers, most of them practicing rainfed agriculture, and remains central to India's textile industry, where the fiber consumption ratio is 60:40 cotton to non-cotton, compared to the global average of 30:70.

India's production spans northern, central, and southern agro-ecological zones, and includes the full spectrum from short staple to premium extra-long staple cotton. Ms Singla reported that Bt cotton now accounts for 94% of India's cotton area, up from less than 1% in 2002/03.

For 2025/26, India projects:

- Domestic consumption of 5.48 million metric tonnes
- Exports of 0.26 million metric tonnes
- Carryover stocks of 0.67 million metric tonnes

She described several government initiatives to improve productivity and sustainability, including the Special Project on Cotton launched in 2023 and expanded in subsequent seasons, covering multiple districts and agro-ecological zones and demonstrating significant yield improvements through high-density planting systems, closer spacing, and improved production technologies.

She also referred to India's efforts in climate resilience, digital advisory tools, and quality enhancement, including the Kasturi Cotton Bharat initiative, which uses blockchain-enabled traceability to certify authenticity and promote Indian cotton in premium global markets.

Finally, she highlighted India's broader policy direction under the Prime Minister's "5F" vision — "farm to fiber to factory to fashion to foreign" — and referred to India's network of trade agreements, including the recently concluded agreement with the United Kingdom and an India-EU FTA.

## Kenya

The delegation of Kenya stated that cotton is grown predominantly by smallholder farmers, numbering around 50,000, and that the broader value chain benefits approximately 200,000 people directly and indirectly.

The delegation emphasized that the Government of Kenya has prioritized the cotton value chain in its development agenda and that government interventions have helped to double production, productivity, and area under cotton over the last two to three years.

It reported that government support includes provision of seeds and pesticides and support to cooperatives, including seed cotton milling equipment. Kenya is also developing regulations for fibers and fiber products and is finalizing a cotton, textiles, and apparel policy, expected to guide further development of the subsector.

## **Pakistan**

The delegation of Pakistan stated that cotton remains one of the country's most important natural fibers and is central to rural livelihoods and the textile industry.

It noted that Pakistan remains among the top five global cotton producers, contributing around 0.8 million tons of lint from approximately 5 million acres, but stressed that production has declined sharply over the last two decades — from around 15 million bales in the early 2000s to less than 5 million bales more recently — due to climate change, water scarcity, pest pressure, and seed system constraints.

The delegation explained that the Government of Pakistan is addressing these challenges through the Green Pakistan Initiative, which aims to place cotton more squarely within national planning and supports climate-resilient agriculture, modern irrigation, improved seed systems, and sustainable land use. It also referred to major work being undertaken by the Pakistan Central Cotton Committee, Better Cotton, WWF, CABI, and other actors on sustainability, traceability, regenerative cotton, and smallholder support.

The delegation highlighted Pakistan's growing organic cotton sector and regenerative cotton clusters, as well as efforts to build digital traceability systems from farm to bale in response to growing global demand for transparency and Scope 3 emissions reductions.

For the coming season, the government aims to cultivate 6–7 million acres of cotton and is promoting early-season planting, with 0.7 million acres already planted early and plans to expand this to increase production.

Pakistan expressed interest in deeper collaboration with ICAC on traceability, financing, carbon markets, and support for smallholder farmers.

## South Africa

The delegation of South Africa presented cotton production as an important contributor to the economy and highlighted the role of Cotton SA, the sector's coordinating body.

It reported a slight increase in area planted for 2025/26, with planted area rising to 15,600 hectares, compared to about 13,000 hectares in the previous season. It also outlined quality control and grading work conducted by the local system and reported that the 2024/25 production year had seen more than 62,000 lint samples evaluated.

The delegation noted that around 76% of cotton fell in the middle to higher color grades, with middling and strict middling the most common. It also presented projections for the current season, including a 19% increase in area planted and a 29% rise in total production.

South Africa emphasized the importance of smallholder cotton production, concentrated mainly in KwaZulu-Natal and Mpumalanga, and outlined the contribution of cotton to GDP, exports, and rural development. It also referred to major challenges, including climate change, imported cotton competition, and limited access to finance for small-scale farmers.

The delegation stated that the Government of South Africa is providing support, including soft loans, to help farmers manage challenges such as floods. It concluded by affirming South Africa's strong commitment to ICAC and stressing the benefits the country has derived from its membership.

## Taiwan

Mr Alex Chen, Economic Counsellor in the International Trade Administration of the Ministry of Economic Affairs, presented Taiwan's statement.

He explained that while Taiwan is not a cotton-growing economy, it has built a globally significant textile industry over seven decades through innovation and integration of cotton with advanced spinning technologies. Today, Taiwan is a leading producer of functional and high-value-added textiles and plays a major role in global supply chains.

Mr Chen reported that:

- Textile exports in 2024 reached US\$6.74 billion
- Textile imports totaled US\$3.65 billion
- Fabric remains Taiwan's primary export category
- Apparel remains the largest share of imports

Taiwan relies entirely on imported raw cotton, with the United States as the leading supplier, followed by India and Australia. He noted that Taiwan saw a significant decline in raw cotton

imports in 2024, largely because companies were reducing inventories and because some production had shifted overseas.

He stressed that Taiwan is responding to supply chain and sustainability pressures through smart manufacturing, efficiency improvements, and stronger global partnerships. He also welcomed ICAC's efforts to promote cotton's functional versatility and added value.

Finally, Mr Chen announced that, following earlier successful international seminars, Taiwan intends to host an ICAC international seminar later in 2026, focused on Taiwan's strengths in cotton spinning and on synergies between cotton and manmade fibers.

## **Türkiye**

The delegation of Türkiye, represented by Mr Mehmet Ali Işıkaya, Director General of Exports in the Ministry of Trade, outlined the country's cotton and textile situation.

He noted that Türkiye is one of the few countries able to undertake all stages of production from cotton growing through to apparel manufacturing. Cotton is mainly grown in Southeastern Anatolia, accounting for 63% of production, followed by the Aegean region and Çukurova.

The delegation stated that over the last twenty seasons, Türkiye's average cotton production has been about 800,000 tons, and that in 2024/25 production increased to 830,000 tons due to larger planted area and better weather conditions.

It also noted that domestic cotton consumption remains below full potential because of broader economic challenges, and that Türkiye remains one of the world's largest cotton importers since domestic output does not meet demand.

The delegation emphasized that Türkiye produces all of its cotton GMO-free and is the world's second largest producer of organic cotton. It also referred to the establishment in 2023 of a company to promote GMO-free Turkish cotton and build a sustainable cotton supply chain.

On textiles and apparel, Türkiye underlined that these sectors account for around 6% of GDP, include around 60,000 companies, employ around 1 million people, and provide the highest female employment rate in the country at 41.5%. In 2024, textile and apparel accounted for 11% of Türkiye's total exports.

The delegation added that the Turkish textile and apparel sectors are investing heavily in sustainability, circular textiles, digitalization, traceability, and value-added production.

## **Uzbekistan**

The delegation of Uzbekistan stated that the country's cotton sector has rapidly increased productivity between 2021 and 2025, driven by reforms, modern cultivars, and intensive management.

It reported that Uzbekistan had introduced new technologies, including:

- Increased plant density
- Double-row planting
- Greater use of modern varieties, including materials developed through RNA- and marker-assisted breeding and imported Bt and drought-tolerant materials.

According to the delegation, these efforts helped increase average seed cotton yields from 3.2 tonnes to 4.5 tonnes per hectare, while total output rose by 19% despite a reduction of about 15% in land under cultivation.

The delegation concluded that these results demonstrate the potential for sustainable intensification in irrigated cotton systems and highlighted continuing modernization in cotton breeding and production technologies.

## **Closing Remarks**

In closing, the Chair thanked all government delegations for their statements and noted several common themes across the presentations, including:

- The need to increase cotton demand
- The importance of sustainability
- The need to improve cotton economics and farmer returns
- The role of regenerative agriculture and potential carbon-related payments
- Resource constraints, industrialization, new technology, and stronger regional cooperation

He encouraged delegations to make appointments with the Secretariat for one-on-one conversations, emphasizing that ICAC can only be as effective as its understanding of members' needs.

With no further business, the session concluded at 12:30 pm.