



International Cotton Advisory Committee

Provisional Minutes

83rd ICAC Plenary Meeting

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





83rd ICAC Plenary Meeting

MINUTES

2nd Open Session: Reports from the Secretariat

4:00 pm to 5:30 pm, Monday, March 23, 2026

The session began on time. The Chair, Executive Director Eric Trachtenberg, pointed out how popular this session has always been at Plenary Meetings and introduced the first speaker.

World Cotton Market Outlook

Parkhi Vats, Economic Affairs Officer, presented the Secretariat's update on the world cotton market outlook.

She reported that, for the early 2026/27 projection, world cotton consumption is expected to remain close to the current season at 25.0 million tonnes, while world production is projected to decline by 4% to 24.9 million tonnes, with the principal reductions expected in Brazil and Australia. She noted that lower cotton prices and weaker demand, particularly from China, were the main drivers of the projected decline, and that planting intentions in the United States also indicate reduced cotton area as farmers shift to competing crops such as corn and soybean.

Ms Vats explained that production in 2026/27 is expected to continue to be led by China, India, Brazil, the United States, the West Africa region, and Australia, which together account for about 82% of global production. Consumption is also expected to remain led by China, followed by India, Pakistan, Vietnam, Bangladesh, and Türkiye. She noted that China's cotton lint consumption is projected to decline by 2% by the end of the current season and by a further 1% in 2026/27, largely due to the increased use of manmade fibers.

On trade, she stated that world cotton lint trade is projected to be 2.5% lower, at 9.6 million tonnes, though this could change depending on production, ending stocks, tariffs, trade agreements, and geopolitical developments. Brazil is expected to remain the world's largest exporter, followed by the United States, Australia, the West Africa region, the European Union,

and India. Imports are expected to be led by Bangladesh, followed by Vietnam, China, Pakistan, Türkiye, and India.

Ms Vats also summarized recent trade-related developments, including the United States' blanket 15% tariff on all trading partners beginning on 24 February 2026, the US-Bangladesh reciprocal trade agreement, tariff changes affecting India, the India-European Union trade agreement, and earlier trade agreements involving the United States and China and the United States and Vietnam. She noted that these developments could significantly affect cotton trade and consumption.

She further provided updates on the West Africa region, where production and exports remain just under 1 million tonnes, and on world cotton lint stocks, which for 2026/27 are projected to be 1% lower, at 16.2 million tonnes.

Finally, she presented an update on specialty cotton production, reporting that total specialty cotton production reached 8 million tonnes in 2023/24, comprising about 33% of total world cotton lint production. She also noted continued growth in cotton produced under identity programs and certifications, including significant increases in the US Cotton Trust Protocol and Cotton made in Africa.

World Textile Fiber Demand and Global Survey on Women in Cotton

Lorena Ruiz, Economist, presented a report on global textile fiber demand and the results of the new global survey on women in cotton.

Ms Ruiz explained that textile and apparel demand continues to move closely with global economic activity and that, over the long term, global textile fiber demand has expanded sharply alongside population growth. She noted that total fiber demand has risen from around 15 million tonnes in 1960 to nearly 120 million tonnes in 2025, and is projected to reach approximately 138 million tonnes by 2030.

She emphasized that, although total demand has grown, cotton's share of the market has fallen substantially, from about 68% in 1960 to around 21% today, while manmade fibers — especially polyester — now dominate global fiber demand. She reported that polyester production has risen from about 19 million tonnes in 2000 to approximately 70 million tonnes in 2025, with China playing the central role in this growth due to its vertically integrated petrochemical industry and strong government support.

Ms Ruiz further discussed the pricing relationship between cotton and polyester, noting that polyester has often been cheaper and more stable than cotton, making it attractive to manufacturers. She also highlighted the role of geopolitical risks, particularly disruptions linked to the Strait of Hormuz, in affecting energy prices, transport costs, fertilizer prices, and, in turn, both cotton and polyester markets.

In conclusion on fiber demand, she stressed that cotton remains an important fiber but faces increasing competition and that maintaining competitiveness will require improved productivity, clearer communication of sustainability efforts, and stronger coordination across the sector.

Ms Ruiz then presented findings from the 2024 global survey on women in cotton, conducted by ICAC with support from FAO, the +Algodón project in Latin America, and the ICAC Women in Cotton Committee. She noted that the survey received 158 responses from 31 countries and collected information on women's labor participation, wage gaps, access to resources, decision-making roles, and barriers to empowerment.

The survey found that data collection in cotton organizations remains heavily focused on agronomic performance, while financial, market, and demographic data are collected less consistently. It also showed that women remain underrepresented in leadership, technical, commercial, and decision-making roles, although there is increasing recognition of the need for broader structural change. Ms Ruiz noted that approximately 30% of the participants at the Bremen Plenary were women.

Textile Strategy and Developing the Textile Value Chain in Cotton-Rich Countries

Kanwar Usman, Head of Textiles, presented on textile strategy and options for developing the textile value chain in cotton-rich countries.

Mr Usman focused on the economics of moving from raw cotton production into spinning, weaving, processing, and garment manufacturing, with particular attention to opportunities for African cotton-producing countries. He noted that improved market access — including Chinese concessions to African countries and existing preference schemes — creates opportunities for cotton-rich countries to move downstream into textile and apparel production.

He outlined indicative investment costs for different stages of textile production, including spinning mills, weaving plants, processing plants, and garment manufacturing. He emphasized that cost structures differ significantly across stages, with raw material costs and power costs particularly important in spinning, while labor costs play a larger role in garment production.

Mr Usman illustrated how different policy measures — including lower electricity costs, reduced financing costs, lower duties on raw materials, and improved infrastructure — could significantly reduce the cost of doing business and make downstream textile investment more competitive.

He also stressed the export potential of cotton-based products, noting that several of the world's top textile export categories remain cotton-based, and that major markets such as the United States, China, India, and Japan remain significant opportunities. He referred as well to growing sustainability pressures in the supply chain, using the example of Levi's and its Scope 3 emissions profile to show the importance of cotton and yarn production within broader sustainability discussions.

Mr Usman concluded by referencing the upcoming Global Cotton and Textiles Investment Summit, planned for 19–21 November in Uzbekistan.

Sustainability of Cotton Production

Dr Keshav Kranthi, Chief Scientist, presented on the global economics and sustainability of cotton production.

Dr Kranthi began by highlighting the ICAC’s new cotton production data portal, which compiles extensive comparative data on cotton production, costs, inputs, water use, pesticides, varieties, labor, and related variables across numerous countries and subnational regions.

He then addressed several common negative claims about cotton and presented ICAC data challenging those claims. He stated that cotton occupies 2.21% of global arable land and uses 1.91% of global irrigation water, arguing that this does not support the claim that cotton is a “thirsty crop” or “water guzzler.” He reported that the world uses approximately 1,593 liters of irrigation water to produce 1 kilogram of cotton lint, far below widely repeated figures such as 20,000 liters.

On pesticides, Dr Kranthi reported that cotton uses only 3.7% of the world’s pesticides and 10.5% of the world’s insecticides, again disputing much higher figures often cited publicly. He also addressed highly hazardous pesticides, stating that only about 13% of pesticides used in cotton fall into that category, rather than the much higher figures sometimes repeated in public discussions.

Turning to greenhouse gases, he stated that cotton cultivation emits approximately 50 million tonnes of carbon dioxide equivalent greenhouse gases, not the much larger figures sometimes cited. He emphasized that about 72.6% of cotton’s emissions come from nitrogen fertilizer application, and therefore improved nitrogen management represents the clearest path for reducing emissions.

Dr Kranthi also argued that cotton should not be characterized as a “dirty crop” or “thirsty crop,” but rather as a crop that has been unfairly vilified. He stressed that improvements in soil carbon, including through the use of biochar made from cotton stalks, could reduce emissions, improve soil health, increase yields, and potentially make cotton farms net carbon negative while also generating carbon-related payments for farmers.

ICAC Marketing and Promotion Efforts

Mike McCue, Director of Communications, presented on ICAC’s marketing and promotional efforts on behalf of cotton.

Mr McCue began with World Cotton Day, noting that the initiative originated at ICAC in 2018 and that the first in-person World Cotton Day event was held at WTO headquarters in Geneva in

2019, attracting more than 800 participants and 14 ministers. He also recalled that the C4+1 countries later successfully petitioned the United Nations to designate 7 October as World Cotton Day on its permanent calendar.

He described World Cotton Day as having grown into a genuinely global phenomenon, especially during the COVID-19 period, when celebrations became decentralized and were adopted in many countries and communities around the world.

Mr McCue also outlined ICAC's current outreach through Twitter/X, LinkedIn, and Instagram, noting that the organization has more than 10,000 followers across those platforms. He highlighted the #TruthTuesday series as a regular effort to combat misinformation about cotton, including myths about water use. He noted that ICAC had engaged directly with WWF on the inaccurate "20,000 liters of water" claim, and that WWF had subsequently removed that figure from its website, illustrating that the efforts can have an impact.

He further emphasized that ICAC's promotional work is increasingly collaborative, involving member governments and other industry allies, and described two major current initiatives:

- The Book of Cotton, a non-technical set of short chapters explaining cotton's benefits for non-specialist audiences; and
- A World Without Cotton, a planned video project intended to illustrate the broader economic, environmental, and social consequences of losing cotton.

Mr McCue encouraged interested stakeholders to contribute ideas, skills, or resources to these collaborative promotional efforts.

Closing of the Session

In closing remarks, the Chair thanked all presenters for their reports and noted that the Secretariat's work on data, sustainability, downstream strategy, market analysis, and communications provides a strong basis for improving cotton's position in the global market.