



PROCEEDINGS

55th Plenary Meeting of the
International Cotton
Advisory Committee

Tashkent, Uzbekistan
October, 1996

PROCES-VERBAL

55e Réunion Plénière du
Comité Consultatif International
du Coton

Tachkent, Ouzbékistan
Octobre, 1996

ACTAS

55a Reunión Plenaria del
Comité Consultivo
Internacional del Algodón

Tashkent, Uzbekistán
Octubre, 1996

PROCEEDINGS
OF THE
55TH PLENARY MEETING



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FOREWORD

At the invitation of the Government of Uzbekistan, the 55th Plenary Meeting of the International Cotton Advisory Committee was held in Tashkent, Uzbekistan from October 7 to 11, 1996.

The International Cotton Advisory Committee is an association of governments having an interest in the production, export, import and consumption of cotton. It is an organization designed to promote cooperation in the solution of cotton problems, particularly those of international scope and significance.

The functions of the International Cotton Advisory Committee, as defined in the Rules and Regulations, are

- To observe and keep in close touch with developments affecting the world cotton situation
- To collect and disseminate complete, authentic, and timely statistics on world cotton production, trade, consumption, stocks and prices
- To suggest, as and when advisable, to the governments represented, any measures the Advisory Committee considers suitable and practicable for the furtherance of international collaboration directed towards developing and maintaining a sound world cotton economy
- To be the forum of international discussions on matters related to cotton prices

PREFACE

Sur l'invitation du Gouvernement des Uzbekistan, le Comité consultatif international du coton a tenu sa 55e Réunion plénière à Tashkent, Uzbekistan du 7 au 11 octobre 1996.

Le Comité consultatif international du coton (CCIC) est une association de gouvernements ayant un intérêt dans la production, l'exportation, l'importation et la consommation de coton. C'est une organisation créée dans le but d'encourager la coopération pour la solution des problèmes relatifs au coton qui présentent un caractère international.

Les fonctions du Comité consultatif international du coton, telles que les définit le Règlement statutaire, sont les suivantes :

- Observer et suivre de près l'évolution de la situation mondiale dans la mesure où elle intéresse le coton.
- Réunir et publier des statistiques complètes, officielles et à jour sur la production, le commerce, la consommation, les stocks et les prix du coton dans le monde.
- Proposer, s'il en est besoin, aux Etats-membres du CCIC, toutes mesures que ce dernier juge appropriées et réalisables pour renforcer la collaboration internationale afin de développer et de maintenir une économie mondiale du coton qui repose sur des bases saines.
- Etre le forum international pour toutes discussions relatives aux prix du coton.

PROLOGO

Por invitación del Gobierno de Uzbekistan, la 55a Reunión Plenaria del Comité Consultivo Internacional del Algodón se celebró en Tashkent, Uzbekistan, del 7 al 11 de octubre de 1996.

El Comité Consultivo Internacional del Algodón es una asociación de gobiernos que se interesan en la producción, exportación, importación y consumo de algodón y tiene como finalidad promover la cooperación para solucionar los problemas algodóneros, en particular los de alcance y significación internacional.

Las funciones del Comité Consultivo Internacional del Algodón, según se definen en el Reglamento son las siguientes:

- Observar el desarrollo que afecta la situación algodónera internacional y mantenerse al corriente de la misma.
- Reunir información estadística completa, oportuna y auténtica sobre la producción, el comercio, las existencias y los precios mundiales del algodón y divulgar dicha información.
- Sugerir a los gobiernos representados, en la forma y oportunidad convenientes, cualquier medida que el Comité Consultivo estime adecuada y factible para el progreso de la colaboración internacional con la debida atención a la manutención y desarrollo de una economía mundial algodónera sana.
- Ser el foro de discusiones internacionales en materias relacionadas con los precios del algodón.

MEMBER GOVERNMENTS

ETATS MEMBRES

PAISES MIEMBROS

Argentina	Germany	Russia
Australia	Greece	South Africa
Belgium	India	Spain
Bolivia	Iran	Sudan
Brazil	Israel	Switzerland
Cameroon	Italy	Syria
Chad	Japan	Tanzania
China (Taiwan)	Mali	Turkey
Colombia	Korea, Rep. of	Uganda
Côte d'Ivoire	Netherlands	United Kingdom
Egypt	Pakistan	USA
Finland	Paraguay	Uzbekistan
France	Philippines	Zimbabwe
	Poland	

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CONTENTS

FOREWORD—PREFACE—PROLOGO	1
MEMBER GOVERNMENTS—ETATS MEMBRES—GOBIERNOS MIEMBROS	3
البيان الصادر عن الاجتماع العام الخامس والخمسين	112
STATEMENT OF THE 55TH PLENARY MEETING	6
DECLARATION DE LA 55E REUNION PLENIERE	8
Заявление 55-го пленарного заседания	9
DECLARACION DE LA 55A REUNION PLENARIA	11
MINUTES	
Inauguration	13
Inauguration	35
Inauguración	59
Plenary Sessions—Séances plénières—Sesiones Plenarias	
First Plenary Session	13
Première séance plénière	35
Primera Sesión Plenaria	59
Attachments	13
Pièces jointes	35
Anexos	59
Second Plenary Session	16
Deuxième séance plénière	39
Segunda Sesión Plenaria	63
Third Plenary Session	19
Troisième séance plénière	42
Tercera Sesión Plenaria	66
Fourth Plenary Session	24
Quatrième séance plénière	48
Cuarta Sesión Plenaria	72
Fifth Plenary Session	25
Cinquième séance plénière	48
Quinta Sesión Plenaria	73
Closing Plenary Session	25
Séance de clôture	49
Sesión Plenaria de Clausura	73
Steering Committee—Comité de direction—Comité Directivo	
First Meeting	26
Première réunion	50
Primera Reunión	74
Second Meeting	27
Deuxième réunion	50
Segunda Reunión	75
Third Meeting	31
Troisième réunion	55
Tercera Reunión	80
Attachments	32
Pièces jointes	56
Anexos	81
LIST OF DOCUMENTS AND WORKING PAPERS	84
REPRESENTATION	85

STATEMENT OF THE 55TH PLENARY MEETING

The International Cotton Advisory Committee, the intergovernmental forum for discussion of matters related to cotton, met in Tashkent, Uzbekistan, from October 7 to 11, 1996, in its 55th Plenary Meeting since the Committee was established in 1939. Thirty-five member countries were represented. Representatives of 14 non-member countries and five international organizations participated as observers. The Committee approved the following statement:

1. World cotton production and consumption are expected to maintain a balance at more than 19 million tons during the next two seasons. Because the differences between production and consumption during 1996/97 and 1997/98 are expected to be small, only minor adjustments in ending stocks are forecast, and a period of stable prices at a slightly above average level is expected.
2. According to estimates presented to the Committee, the average Cotlook A Index is likely to rise 10 to 15% above the long run average of 73 US cents per pound by 2000 because of slow growth in cotton supplies. Competition with food crops for land may constrain cotton plantings, and current technology is likely to result in only modest gains in cotton yields during the next four seasons.
3. World cotton consumption has been stagnant since the mid-1980s. However, it is expected to climb by 900,000 tons, to a record 19.5 million tons during the next two seasons. During the past ten years, increases in cotton use in many countries have been partially offset by declines in countries comprising the CIS.
4. Cotton's share of world textile fiber use fell from 50% in the mid-1980s to 45% in 1995. It was noted that the decline in share has been caused by a number of factors, including reduced promotional activities, quality disadvantages and supply shortages as a result of limited gains in cotton yields. It was decided that the ICAC Secretariat and the Standing Committee, together with invited specialists, would prepare specific proposals for arresting the decline in cotton's market share. Such proposals would be circulated to member countries two months in advance of the 56th Plenary Meeting in order to seek approval and implementation at that Meeting.
5. Several countries reported their experiences with efforts to liberalize their cotton economies. Some countries were encouraged by the initial results of these efforts, while other countries felt that current institutional arrangements best protected the interests of farmers.
6. The Committee heard reports that, through liberalization, government policies were increasingly permitting cotton growers to respond to market signals, while reducing the free provision of input supplies. The need for small farmers to have increased, affordable information about how to cope with privatized markets was again noted. Some delegates noted that subsidies by some countries were preventing efficient world production and trade. Member countries called for the elimination of subsidies and unfair trade practices through the whole cotton production and marketing chain.
7. The Committee heard reports that the world cotton economy is undergoing great change. New routes for the transportation of cotton are being explored, new communication technology is being widely adopted and the use of containers in shipping cotton is becoming more common. Progress is being made in the development of a new cotton futures market in Turkey. Sources of export supply and import destinations have changed in the past decade, and the number of participants in the world cotton market has increased. New entrants were urged to comply with standards of the profession. Governments and other parties involved in the trade were urged to confirm their support for international arbitration as a means of resolving contractual disputes and abide by the terms of accepted international conventions for the enforcement of arbitral awards.
8. The need to improve cotton quality was emphasized. Due to the demands of modern spinning technology and pressures in the marketplace for increased textile efficiency, raw materials are under increasing stress. There is a need for higher quality cotton. Cotton's competitiveness in the marketplace would be assisted by the development of varieties better adapted to improved spinning technology, by better ginning and by reducing contamination.
9. Governments supported a petition to declassify cotton as a hazardous material. This petition will be considered by the International Maritime Organization in the next year. It was noted that there was no empirical support for the classification and acceptance of the petition would reduce costs.
10. The Committee held a technical seminar on the topic "Short Season Cotton: How Far Can It Go?" The technical seminar in 1997 will be devoted to a review of progress under Committee-sponsored and Common Fund-financed cotton development projects. Plans were made for the second World Cotton Research Conference to be held in Greece in 1998.
11. The 56th Plenary Meeting of the Committee will be held in Asuncion, Paraguay, in the last week of October 1997. The Committee has previously accepted invitations to hold the 57th Meeting in Bolivia in 1998 and the 58th Meeting in Sudan in 1999.

SUPPLY AND DISTRIBUTION OF COTTON

11 October 1996

Years Beginning August 1

	1992	1993	1994	1995 Est.	1996 Proj.	1997 Proj.
Million Metric Tons						
BEGINNING STOCKS						
WORLD TOTAL	9.221	8.619	6.967	7.642	8.91	8.90
CHINA (MAINLAND)	3.204	2.964	2.126	3.043	4.17	3.52
USA	0.807	1.015	0.769	0.577	0.57	0.77
NET EXPORTERS	4.018	3.910	3.229	3.042	3.29	3.94
NET IMPORTERS 1/	5.203	4.709	3.738	4.599	5.62	4.95
PRODUCTION						
WORLD TOTAL	17.981	16.867	18.687	19.955	19.20	19.50
CHINA (MAINLAND)	4.510	3.739	4.342	4.767	3.70	4.10
USA	3.531	3.513	4.281	3.897	3.85	3.90
INDIA	2.380	2.095	2.355	2.669	2.90	2.54
PAKISTAN	1.539	1.368	1.478	1.799	1.67	1.71
UZBEKISTAN	1.306	1.358	1.248	1.250	1.18	1.21
TURKEY	0.574	0.602	0.628	0.837	0.79	0.82
OTHERS	4.141	4.192	4.355	4.735	5.11	5.22
CONSUMPTION						
WORLD TOTAL	18.739	18.440	18.362	18.627	19.21	19.51
CHINA (MAINLAND)	4.589	4.587	4.269	4.300	4.50	4.50
INDIA	2.108	2.160	2.279	2.475	2.57	2.68
USA	2.232	2.268	2.438	2.308	2.45	2.52
EAST ASIA & AUSTRALIA	2.358	2.299	2.192	2.198	2.20	2.18
EU & TURKEY	1.796	1.898	2.046	2.041	2.07	2.05
PAKISTAN	1.514	1.510	1.506	1.557	1.56	1.59
E. EUR. & FORMER USSR	1.462	1.082	0.963	0.992	1.04	1.07
BRAZIL	0.793	0.834	0.818	0.845	0.85	0.88
OTHERS	1.888	1.802	1.850	1.911	1.97	2.04
EXPORTS						
WORLD TOTAL	5.515	5.925	6.325	6.140	5.88	5.92
USA	1.132	1.494	2.047	1.687	1.40	1.36
UZBEKISTAN	1.300	1.288	1.250	1.050	0.94	0.99
FRANCOPHONE AFRICA	0.504	0.520	0.614	0.623	0.64	0.68
AUSTRALIA	0.371	0.367	0.293	0.305	0.44	0.47
ARGENTINA	0.047	0.069	0.220	0.296	0.31	0.31
GREECE	0.120	0.175	0.265	0.271	0.27	0.28
CHINA (MAINLAND)	0.149	0.166	0.040	0.005	0.05	0.05
IMPORTS						
WORLD TOTAL	5.794	5.772	6.629	6.070	5.88	5.92
EAST ASIA & AUSTRALIA	2.238	2.225	2.164	2.161	2.14	2.19
EU & TURKEY	1.191	1.231	1.262	1.136	1.17	1.29
E. EUR. & FORMER USSR	1.110	0.847	0.904	0.836	0.81	0.88
CHINA (MAINLAND)	0.053	0.176	0.884	0.663	0.20	0.20
SOUTH AMERICA	0.496	0.542	0.476	0.495	0.70	0.70
TRADE IMBALANCE 2/ STOCKS ADJUSTMENT 3/						
	0.278	-0.153	0.304	-0.070	-0.00	-0.00
	-0.122	0.075	0.045	0.011	-0.00	-0.00
ENDING STOCKS						
WORLD TOTAL	8.619	6.967	7.642	8.911	8.90	8.89
CHINA (MAINLAND)	2.964	2.126	3.043	4.169	3.52	3.27
USA	1.015	0.769	0.577	0.566	0.77	0.78
NET EXPORTERS	3.910	3.229	3.042	3.290	3.94	4.04
NET IMPORTERS 1/	4.709	3.738	4.599	5.621	4.95	4.85
ENDING STOCKS/USE 4/ COTLOOK A INDEX 5/						
	0.39	0.35	0.39	0.38	0.38	0.38
	57.70	70.60	94.30	85.61	75*	77*

1/ Includes Brazil, China (Mainland), Colombia, Mexico, Turkey and traditional importers except Greece

2/ The inclusion of linters and waste, changes in weight during transit, differences in reporting periods and measurement error account for differences between world imports and exports.

3/ Difference between calculated stocks and actual; amounts for forward seasons are anticipated

4/ World-less-China (Mainland) ending stocks minus China net exports, quantity divided by world-less-China consumption

5/ U.S. Cents per pound. Model results for 1996/97 and 1997/98 are based on net China (Mainland) trade, ratios of world-less-China (Mainland) ending stocks to use, barter sales from Central Asia, and futures prices. The estimate for 1994/95 is adjusted for quotes during June and July.

*/ 95% confidence intervals extend 9 cents per pound above and below each point estimate

Inauguration

Monday, October 7, 1996, 12:30 pm

The SECRETARY GENERAL presented H. E. Islam Karimov, President of the Republic of Uzbekistan. He noted that it was an honor for the Committee that he was inaugurating the 55th Meeting, in which there was a great deal of interest as noted by the record number of participants. He referred to Uzbekistan's history at the crossroads of merchant routes and cultures and to the country's strides since independence five years ago. His remarks are a Statement of the Meeting.

President Karimov welcomed delegates and observers to Tashkent and wished them fruitful discussions. He said the construction of the hotel where the Meeting was taking place was a significant token of the Government of Uzbekistan's commitment to the Meeting and its appre-

ciation to delegates for their presence in Tashkent. He addressed greetings to representatives of cotton associations such as the Liverpool Cotton Exchange, the Bremer Baumwollbörse, the New York Cotton Association and others participating in the Meeting.

He reviewed the history of Uzbekistan in the production of cotton and its ancient position. He reported on the country's cotton industry strategy and referred to a number of projects under way, including the World Bank development project and several joint ventures with cotton trading firms, machinery manufacturers and other private companies with an interest in Uzbekistan.

He said Uzbekistan is intent to develop the potential of its cotton industry further through increased yields, improved quality, increased pro-

duction of quality seeds, improvements in water use and in improving the environment. He noted that a special agency had been created in the Cabinet of Ministers to realize these objectives. President Karimov reviewed its cooperation with private firms in other countries which had assisted the country with training. He further noted the steps being taken to develop better transport routes for cotton, to the east, west and south.

The SECRETARY GENERAL thanked the President for his comprehensive view of the current state and future development of the cotton industry in Uzbekistan and noted that the 55th Plenary Meeting was now officially open.

Statements of the Meeting, which are an integral part of the full record of the Meeting, are published separately.

First Plenary Session

Monday, October 7, 1996, 2 pm
Mr. Utkur Sultanov in the Chair

The CHAIR introduced the Secretary General to present the report of the Chairman of the Standing Committee. The SECRETARY GENERAL noted that Mr. Jose Molina of Argentina was not present in Tashkent and that he was presenting the Report of the Chairman of the Standing Committee in his behalf. He reviewed the activities of the Standing Committee in the last year and the relationship of the Committee to the Common Fund for Commodities. Mr. Molina's report is attached.

The CHAIR next introduced Mr. Lawrence Shaw to present the report of the Executive Director. Mr. Shaw reviewed the activities of the Secretariat in the period since the last Plenary Meeting of the Committee in Manila in October 1995 and the Economic and Statistics and Technical Information functions of the Secretariat. The Executive Director's report is attached.

The CHAIR noted that administrative issues raised in the two reports could be discussed during the second meeting of the Steering Committee.

The CHAIR recognized the delegate of ARGENTINA who noted that there were many factors in the world which united nations. One such factor, he said, was cotton growing. He said the Argentine delegation expressed its profound gratitude to the Government of Uzbekistan and the people of Tashkent for the hospitality shown to participants in the Meeting. He reviewed the

history of Uzbekistan in cotton production, noting its 2000 year heritage and the more recent efforts to irrigate the desert in the valleys of the Syr-Darya and Amu-Darya in the 1920s. He recognized the achievements of Uzbekistan in increasing its production and as the world's second largest exporter of cotton. He said he looked forward to the technical seminar on Thursday when varietal developments famous in Uzbekistan would be discussed. The delegate of Argentina's remarks are a Statement of the Meeting.

The CHAIR thanked the delegate of Argentina for his kind words about Uzbekistan and his historical review of cotton in Uzbekistan which would help delegates to know more about cotton in the country. Following these comments and the two formal reports required under the Rules and Regulations of the Committee, the CHAIR adjourned the First Plenary Session.

ATTACHMENTS

Report of the Chairman of the Standing Committee

José D. Molina
Argentina

I would like to express the appreciation of the International Cotton Advisory Committee to the Government of Uzbekistan for hosting the 55th Plenary Meeting of the ICAC. Uzbekistan joined the ICAC at the 51st Plenary Meeting which was

held in Liverpool, United Kingdom, shortly after the Republic became an independent country. Cotton is especially important to the people of Uzbekistan. Uzbekistan specialized in the production of cotton when it was part of the Soviet Union. Now, diversification has occurred and Uzbekistan is producing many agricultural and industrial products. But still cotton retains its importance in the economy.

Uzbekistan's cotton is extremely important to the world as well. Uzbekistan is now one of the two largest exporters of cotton in the world. The Secretariat has assisted Uzbekistan's cotton sector develop its independent role in cotton affairs, and Uzbekistan's participation in the work of the International Cotton Advisory Committee has strengthened the Committee. It has been a partnership with mutual benefits, and one which will continue to offer dividends in the years to come.

It is the responsibility of the Chairman of the Standing Committee to report on the activities of the Standing Committee in the period since the 54th Plenary Meeting, which ended on October 27, 1995, in Manila, The Philippines. Since that time, I have served as Chair of the Standing Committee. The other officers of the Standing Committee, which you elected in Manila, Mr. Victoriano Leviste of the Philippines and Mr. Aluisio Lima-Campos of Brazil, have served ably with me.

The Standing Committee met six times between January and September 1996.

It is the function of the International Cotton Advisory Committee to be the forum for discussion on matters related to cotton prices. Such discussions are to take place regularly in the Standing Committee. At each of its meetings in 1995/96, the Standing Committee received a report from the Secretariat on the world cotton situation. In addition, there was an opportunity for member countries to bring matters of concern to their cotton sectors to the attention of the Committee.

In addition to its role as a forum for international discussions, the Standing Committee has the responsibility under the Rules and regulations of the Committee to consider and approve a provisional agenda for this meeting, a budget for the fiscal year which began July 1, 1996, audits of financial records and the appointment of research associates. The Committee completed these duties in 1995/96.

In 1995/96, the Standing Committee addressed two matters referred to it by previous Plenary Meetings of the Committee and a number of administrative matters. Reports on actions taken on administrative matters will be made at the Second Meeting of the Steering Committee on Wednesday afternoon.

At the 53rd Plenary Meeting, it was suggested that the Secretariat examine the possibilities of establishing an international research institute for cotton. Since that meeting in October 1993, the Secretariat has had discussions with the Consultative Group on International Agricultural Research regarding the possibilities of establishing an international research institute for cotton. The CGIAR is an informal association of over forty public and private sector donors, headquartered in Washington DC and headed by a Vice President of the World Bank. The Group includes a number of well known institutes such as the International Rice Research Institute (IRRI) and the International Maize and Wheat Improvement Center (CIMMYT).

There appears to be little enthusiasm at the CGIAR or elsewhere for establishing a new international institution, but the ICAC Secretariat was encouraged to propose that the CGIAR establish an international cotton research agenda. It was envisaged that international research on cotton would focus on the maintenance of a cotton germplasm bank, ecoregional and cotton growing problems of cross-regional interest, the spread of technologies, training in cotton production research and the maintenance of a well equipped fiber technology laboratory to serve the textile industry.

The Technical Advisory Committee of the CGIAR considered the proposal that it establish such an agenda, but decided, "in view of alternate sources of supply for such research," that the CGIAR should not play a formal role. In light

of this decision and because of the support given at the 54th Plenary Meeting to identify world best practices in the development of ecologically and economically sustainable cotton production systems, the Standing Committee considered what actions the ICAC might take regarding international cotton research.

Members expressing views did not support the establishment of a new institution which would require member country financing but did support the continued work of the ICAC in encouraging regional cooperation in cotton production research, the continued sponsorship of international research conferences, the sponsorship of training for cotton scientists and encouragement of the development of cotton programs which would be financed by other organizations.

The second matter which the Standing Committee addressed was the action which might be taken by the ICAC to preserve the place of cotton in the world economy. At the 53rd Plenary Meeting delegates confirmed the importance of market development work for cotton and proposed that a Common Fund project be developed to finance an expert group which would make recommendations regarding the way to proceed following the closing of the International Institute for Cotton, which had been established under the ICAC aegis in 1966. The 54th Plenary Meeting further took note of the fall in cotton's share of market in 1994 and placed priority on addressing actions which the ICAC could take to stop the decline.

The Standing Committee heard from the Secretariat that it did not appear feasible to get the Common Fund's support for the financing of an expert group, an activity the Common Fund considered the responsibility of the ICAC, and also heard the views of member countries on the way to proceed in cotton market development.

The Standing Committee supported sharing of information about cotton promotion programs. It was proposed that the Secretariat prepare a paper on the experiences of other countries, that representatives of cotton promotion programs in member countries be invited to the Standing Committee to discuss their activities and that seminars be held at the margin of Plenary Meetings. Some delegates also drew attention to the need to consider the extent to which trade restrictions, quality problems and environmental problems might be responsible for cotton's declining share of market.

As the attention of the Standing Committee was drawn to administrative issues during most of the past year, it is planned that these activities will be carried out in the next year. Through a Secretariat background paper and invited presentations, the Standing Committee will consider the promotion programs being conducted in member countries. It is expected that a seminar

will be conducted at the 56th Plenary Meeting on actions which the ICAC can take to stem cotton's declines.

It is also my responsibility to report to the Advisory Committee on the relationship between the ICAC and the Common Fund for Commodities. At the 50th Plenary Meeting in Montpellier, France, the Advisory Committee instructed the Standing Committee to keep it informed of the evolving nature of this relationship as projects are proposed for financing to the Common Fund.

The report of the first project sponsored by the ICAC, that on Cotton Production Prospects for the Next Decade, was published by the World Bank in December 1995. A paper on the conclusions of this project will be presented to a later session of this Plenary Meeting. In addition, delegates will receive updated information on the status of the three other projects which the ICAC has sponsored and which have been financed by the Common Fund.

During 1995/96, the Common Fund continued its consideration of a project to improve the marketability of cotton produced in areas affected by stickiness. Changing circumstances have led to the revision of the project to conduct the field work in Sudan. It is hoped that the Executive Board will approve funding for the modified project at the end of this month.

The ICAC must serve as a supervisory body in Common Fund approved projects, necessitating the investment of some staff time and expense in monitoring activities under each of the projects. Costs with regard to Common Fund activities in 1995/96 are estimated at \$17,535, including travel, the value of staff time, copying and mailing of documents, or 1.5% of the annual budget of the ICAC. These costs were about 40% of the level of the past two years. Since 1990, the costs of Common Fund activities have totaled \$153,500 or 2.2% of the cumulative ICAC budget total of \$6.8 million over the five years.

In closing, I would like to extend a special welcome to representatives of Mali, which has recently joined the Committee. I would also like to invite governments of other countries which do not yet belong to the Committee to join the ICAC. The ICAC welcomes all countries with an interest in cotton and looks forward to welcoming you into its ranks.

Report of the Executive Director

Lawrence H. Shaw

It is my duty to report to you on the activities of the Secretariat of the Committee since the 54th Plenary Meeting in Manila.

1996 is the 50th year of the operation of the Secretariat. The Committee as you know was established in 1939 just after the onset of the second world war. Meetings were suspended in 1942-44 because of the war, and at the Fifth Plenary Meeting in 1946, it was decided, because of the need to keep the world cotton situation under continuous review, to establish a permanent Secretariat.

The world has changed in many ways in the last 50 years, but the terms of reference of the Secretariat have not. In 1996 as in 1946 the Secretariat observed the world situation and collected and disseminated statistics and other information relating to cotton and textiles. The Secretariat also sought to further international cooperation and to facilitate discussions on matters related to cotton prices. The aim of the Secretariat's effort was to foster a healthy world cotton economy in which producers and consumers of cotton can prosper.

The two areas which the Secretariat observes are the economic market for cotton and technical information related to cotton production. The Economics and Statistics staff of the Secretariat keep the world cotton situation under continuous review and update statistical estimates of world cotton production, consumption, trade and stocks on an almost daily basis. These updated statistics are readily available on the Internet. At the end of each month, the Secretariat publishes a monthly update of the world cotton situation, which is available on the Internet, by email or by fax. Each two months the Secretariat publishes its estimates in *COTTON: Review of the World Situation* with a more extensive description of recent and prospective developments in the economic situation for cotton, together with reports of developments in cotton policies and in the cotton sectors of individual countries. Annually, the Economics and Statistics staff also publish detailed statistics and reports on world textile demand, world cotton trade and world cotton supplies. Updated versions of the statistics in these reports are published on CD-ROM at the beginning of April. The annual CD-ROM also includes the complete historical statistics on cotton maintained by the ICAC as well as past history of major ICAC documents.

Access to all ICAC information is available on the Internet to all delegations. Utilizing the Internet is a way for member countries to gain access to ICAC information at low cost and in the most timely fashion possible. I hope that increasing numbers of member governments will be able to use the Internet as an information source in the coming year. For our part, we have upgraded our facilities to speed access to our sites and urge you contact us regarding assistance in accessing ICAC information on the Internet.

When the Secretariat was established, it was

envisioned that agencies in each member country would send monthly reports to the Secretariat, which the Secretariat would compile for the benefit of other members. It has not quite worked out this way. Today the Secretariat continues to rely on coordinating agencies in each member country to supply it with statistical information on the cotton sector. However, not all coordinating agencies are in a position to provide the information required by the Secretariat. Particularly in those countries where the cotton sector has been recently liberalized, it may no longer be possible to compile detailed statistical reports on cotton. Also, of course, not all cotton countries are members of the Committee. Therefore, the Secretariat relies on all possible sources of information, including informed estimates from recent visitors, trade publications, other international organizations and informal assessments from others making cotton estimates. Estimates are confirmed by Secretariat visits to individual member countries, which are scheduled at least once each three years.

This year members of the Secretariat were able to meet with member governments and/or representatives of the cotton sectors in 21 member and six non-member countries. In addition to collecting cotton information, Secretariat personnel made presentations of the current outlook for cotton, participated in international meetings and supervised ICAC-sponsored Common Fund projects.

Communicating the most knowledgeable estimates of world cotton production and consumption to member countries is the goal of the Secretariat. Of course, as each day goes by, we know a little more about the season. And with the necessary delays in reporting, it may be many months after the end of a cotton season before final figures are available even in the countries with elaborate statistical procedures. Thus having a good estimate of production is always relative to the time when the estimate is made. The closer one gets to the end of the season, the more likely that the estimate will be a good one. But to most participants in the cotton market, good estimates at the end of the season are of little value.

Thus the Secretariat aims to produce estimates of world cotton production and consumption beginning at the end of May two seasons before. These early estimates are of course subject to greater error than estimates one season in advance. The current issue of *COTTON: World Statistics* includes tables showing the Secretariat's errors in estimating cotton production, consumption, trade and stocks for the world and a number of countries. There is probably little possibility of reducing these errors much in the future, as cotton production continues to depend on very variable weather conditions and cotton consumption depends on changing economic circumstances. It is important for users of the

Secretariat's estimates, however, to know the magnitude of past errors to evaluate the accuracy of current estimates.

Our errors are smallest in estimating consumption although we consistently overestimated consumption in advance of the season in the 1990-1996 period. On average we have had a 5 percent mean error two years ahead of the end of the season. In the case of production our error has been 7 percent. These errors have been reduced to 4 percent in the case of production and 3 percent in the case of consumption one year ahead of the end of the season.

Changes in stocks are the result of the differences between production and consumption. Differences are difficult to forecast as anyone who has had experience with forecasting budget deficits or company earnings knows. And our errors in estimating stocks have been larger—19 percent in the case of world stocks two years ahead and 12 percent one year ahead.

These errors are somewhat less when looking at stocks outside of the Chinese mainland. As you know, there is substantial difference of opinion regarding the size of Chinese stocks even today, with the range in estimates exceeding 100 percent. If stocks of China (Mainland) are excluded, the Secretariat's error was 16 percent two years ahead and 8 percent one year ahead.

As the level of stocks outside the Chinese mainland is the key determinant of the Secretariat's estimates of changes in cotton prices, errors in the forecasts made of the Cotlook A Index are of a similar magnitude, 15 percent two years ahead and 9 percent one year ahead. The error in the price forecasting equation is less, around 4 or 5 percent, but it is compounded by errors made in forecasting the independent variables.

Currently the Secretariat, based on its assessments of world production and consumption, expects the Cotlook A Index to average in the mid-70 cent range in the 1996/97 and 1997/98 seasons. These forecasts represent declines of 8-10 cents a pound from 1995/96 and 16-18 cents a pound from 1994/95, although the Cotlook A Index is still expected to remain near its 20 year average. The reason for the decline is a buildup in world stocks both in China and elsewhere.

World cotton consumption has increased relatively little in the last ten years, growing 8 percent while world textile fiber consumption has risen 20 percent. Per capita consumption of all textile products has risen from 7.1 kgs to 7.2 kgs, while cotton use has declined from 3.5 kgs to 3.2. Cotton's share of the world fiber market has declined from 50 percent in 1986 to 45 percent in 1996, the lowest in cotton history.

This decline in share is a matter of concern as consuming and producing countries have much

to gain from growing consumption of cotton. However, if the share decline continues at the current pace, growth in world cotton consumption may come to an end.

In the area of technical information on cotton production, the Secretariat's Technical Information Section continued to publish *THE ICAC RECORDER* in which updated information is presented on developments in cotton production research. Articles in the Recorder present reports of international cotton research meetings and reviews of current research on topics of interest to both producers and consumers of cotton. A number of the articles which have been published in the past in the Recorder on organic cotton production have been compiled into a separate document which has been distributed at this meeting. The Technical Information Section has also prepared for this meeting an updated survey of cotton production practices.

The Technical Information Section conducted a research seminar and sponsored several regional meetings of cotton researchers in the last year. In November 1995, together with FUNDA (the Nicaraguan Foundation for Agricultural Development) the Committee sponsored the fifth meeting of ALIDA (the Latin American Association for Cotton Research and Development). In May 1996, the Committee held a seminar in Washington for persons interested in fiber technology under its research associate program. Ten researchers from Belgium, China (Taiwan),

Colombia, Greece, India, Rep. of Korea, Sudan, Turkey, Uganda and Zimbabwe were able to attend. In September, the Committee was a sponsor, together with the FAO (Food and Agriculture Organization of the United Nations) and the cotton program of CIRAD (Center for International Cooperation in Agronomic Research for Development), of the third meeting of the Inter-Regional Cooperative Research Network on Cotton in the Mediterranean and Middle East.

In sponsoring these meetings, the Secretariat is carrying out the mandate given to it when the Technical Information Section was established in 1980 to facilitate the exchange of information and develop lines of communication among scientific workers in order to promote a better understanding of research problems.

Technical information is also available on the Internet. In July 1996, the Secretariat launched a boll weevil email list whereby participants throughout the world can share information on boll weevil control. Contributions sent to the list are forwarded to all list participants. The boll weevil is a pest of cotton in the Americas and there are participants from the USA, Central and South America. The list is expected to be of particular assistance to Argentina, Brazil and Paraguay in their efforts to develop a control strategy for the boll weevil under an ICAC sponsored and Common Fund financed project.

In 1996, the Secretariat had the opportunity to confer with a number of delegations from member countries visiting Washington DC. During these meetings the Secretariat discussed its work and explored ways in which the Secretariat could be of greater service to member countries. I would like to encourage the delegations of all member countries to call on the Secretariat when visiting the United States.

Once again I would like to take this opportunity to thank the many persons in public and private organizations who have assisted the Secretariat with its work during the last year. It would be impossible for the small staff of the Secretariat with its limited budgetary resources to assess the world cotton situation and publish its reports without the active cooperation of cotton people throughout the world.

I would also like especially to thank Prime Minister Sultanov for his support for the work of the Committee in the last four years and Vice Minister Adylov and his staff for their work in arranging for the Committee to hold its 55th Plenary Meeting in Tashkent.

Together with other members of the Secretariat I look forward to hearing the reports and discussion of this meeting and to receiving your direction regarding the work of the Secretariat in the coming years.

Second Plenary Session

Monday, October 7, 1996, 2:45 pm
Mr. Utkur Sultanov in the Chair

The CHAIR introduced Mr. Gift Makusha from the Cotton Company of Zimbabwe to present a paper on the impact of privatization. Mr. Makusha said that the cotton industry in Zimbabwe is one of the most important subsectors of Zimbabwe's economy and that commercial production of cotton started in 1925 when the Cotton Research Institute was set up. As cotton production increased, he said, it was necessary to establish the Cotton Marketing Board (CMB) in 1969 as a statutory monopoly charged with the procurement of seed cotton, storage and processing as well as domestic and export sales. The CMB was empowered to control production, ginning and marketing of cotton and to register all growers and collect certain levies. After independence, he added, the government took control of the CMB in 1986 but the monopoly status continued until 1994 when the CMB was transformed into a government owned private company called the Cotton Company of Zimbabwe. During the same year, Cotpro, another private company, started operations and in 1996 Cargill started trading in Zimbabwe.

Mr. Makusha also said that due to the fact that the cotton industry was characterized by poor producer prices and increasing costs, the industry was open to competition in the purchasing, processing and marketing of the crop starting in 1994/95. Mr. Makusha added that the viability of cotton production has been a major factor. He said the Commercial Cotton Growers Association (CCGA) represents about 400 large-scale producers in Zimbabwe. CCGA, funded on a levy of seed cotton, delivered 75,000 tons of seed cotton to the market in 1995/96. He mentioned that Zimbabwe is participating in a CFC funded project on integrated pest management initiated in October 1994 with Israel, Egypt and Ethiopia. He also said that the main reasons for the privatization of government owned enterprises are political and bureaucratic interference, the combination of social and commercial objectives into unclear organizational objectives, not economically justifiable policies and confused corporate objectives. As a result of those factors, he noted, it is believed that the privatization of the cotton industry was essential for its survival. He said that privatization also benefited government by making subsidies no longer necessary,

by putting administration and control of the industry in private hands freeing government administrative resources, by corporate taxes increasing government revenue, decreasing the burden of government to fund the industry. Finally Mr. Makusha said that the benefits of privatization extend to the whole economy as growers and end users benefit from market related prices and improved quality and efficiency, because the staff in the industry are more motivated and oriented toward the consumer as shares in the new company provide a sense of ownership, and as the industry is expected to fund adequate research by levying ginners and growers. Mr. Makusha's paper is a Statement of the Meeting.

The CHAIR next introduced Mr. Charles Gashumba, Director of the Agricultural Policy Secretariat of Uganda to present a paper prepared by Ms. Jolly Sabune of the Cotton Development Organisation of Uganda, who had not been able to come to Tashkent, on the experiences of Uganda with the privatization of its cotton industry. Mr. Gashumba said that in Uganda cotton was not the first example of privatization as other commodities such as cof-

fee, tea and tobacco were first privatized. Cotton was first introduced in 1903 and by the 1930s it began competing with coffee as an alternative cash crop, he said. He noted cotton production increased steadily to reach 87,000 tons in 1970, but political instability, civil conflict and inappropriate economic policies resulted in production declining to 2,000 tons in the 1987/88 season.

Before liberalization, Mr. Gashumba said the cotton industry was in a monopolistic inefficient arrangement. In an effort to reverse the cotton production decline, he reported that a strategy was adopted to liberalize the ginning and marketing of cotton and cotton inputs, to increase support for research, seed multiplication and extension services, and to improve the efficiency of ginning by transferring the industry to credit worthy operators. As a result, the government, he noted, had developed a program in the 1993/94 season to open the industry to competition creating the Cotton Development Organization to promote and oversee the cotton industry, to restructure the ginning industry, to improve and strengthen support services, to design a credit mechanism to assure short and medium term credit to farmers and to reduce production bottlenecks and provide better conditions and higher income to farmers. In order to finance the project, he said, the government of Uganda negotiated a credit with the International Development Agency of the World Bank and a loan with the International Fund for Agricultural Development. As a result of the project, he said the Cotton Development Organisation was established in December 1994.

Mr. Gashumba also said that the impact of liberalization has had both positive and negative aspects. On the positive side, for the last two years farmers have realized good prices for their cotton, which have been paid on delivery, as a result of increased competition, ginning capacity sold by unions (with the help of the government) to credit worthy operators and good world market prices. On the negative side, quality standards for seed and fiber have deteriorated due to increased competition, new entrants and some partner countries' willingness to buy poor quality at good prices; difficult seed quality control and frustrated seed multiplication and research efforts; smuggling seed cotton across borders; and difficult zoning for seed multiplication. Mr. Gashumba added that the constraints to increased cotton production under the present liberalized system include poor coordination as the industry has been fragmented into different government ministries, lack of a sustainable rural credit delivery system, high interest rates, gineries skeptical to borrow and to lend to farmers, rudimentary method of production of small farmers, and the weather given that production in Uganda is under rainfed conditions. Mr. Gashumba noted that under the liberalized environment, and with good prices, confidence in

cotton has been restored and concluded that liberalization should achieve its objectives in view of the financial support to the sub-sector, the enthusiastic participation and response, and the conducive policy environment. Mr. Gashumba's paper is a Statement of the Meeting.

The CHAIR introduced Mr. Michel Fichet, Chairman of the Compagnie Française pour le Développement des Fibres Textiles, to present a paper on the impact of privatization in the African countries of the franc zone. Mr. Fichet said that it might be surprising that the French delegation should deal with the subject that concerns the producers of nine African countries, but that France, in addition to consuming about 100,000 tons of cotton a year, is also, as a result of history and commitments to cooperation, an important player in the cotton adventure in the franc zone of Africa, which had turned into a great producer of 1.6 million tons of seed cotton in 1995/96.

Mr. Fichet said that between 1960/61 and 1995/96 area in the nine franc zone countries increased from 612,000 hectares to 1.5 million, yields from 299 kg of seed cotton per hectare to 1,071 kg, seed cotton production from 183,000 tons to 1.6 million tons, ginning outturn increased from 35.7% to 41.6% due to the introduction of new varieties and lint production increased from 65,000 tons to 683,000 tons. These achievements, he said, were the result of an integrated sector approach, with effective methods of supervision and intensification, developed for a particular socioeconomic context in tropical conditions with rainfed conditions practiced where cotton is grown by smallholders.

Mr. Fichet added that the cotton company in the franc zone countries has an obligation to achieve results and is government's tool to implement economic policy. He said the main role of the cotton company is to develop an efficient cotton sector, regarded as the engine for development, and the main objective is to maintain and improve competitiveness of cotton in the world market. As a professional operator, he noted the company specializes in all aspects of production, transport, storage, ginning, packing, marketing and processing of by-products. In reference to prices of seed cotton, he said the principles governing the functioning of the cotton sector in the franc zone African countries, which are the basis of an undeniable success, are an announced fixed price for the entire season before sowing, a national uniform price in each country, exclusive buying rights and obligation to buy the whole harvest.

In reference to privatization Mr. Fichet said that privatization seems desirable, necessary and inevitable if the current dominant faith is to be believed. He made the following remarks: The impact of a possible privatization of the cotton

companies in the franc zone should, therefore, be considered in light of the existing situation, according to the obligations imposed by certain financial organizations, in relation to the risk of dismantling the sector including the consequences for producers. The current situation shows that in two of the nine countries in the franc zone there are two state owned companies fully controlled by the government and in the remaining seven countries there are semi-public companies in which shareholders and private partners are associated with the state. No cotton company has yet been privatized in French-speaking Africa, but the possibility is being considered in several countries and, in two countries, private companies have been founded for the construction of gineries in a framework defined and controlled by the state. This system, vigorously contested by the World Bank, is now brought into question. Currently there is a call for "an obligation to privatize," but an informed observer of the current situation in the African franc zone will fully agree that the privatization objectives as defined by the work of Pierre Guislain are fully and positively met by present cotton companies and furthermore would be eroded in the event of privatization.

The main thing, said Mr. Fichet, is not to enter into ideological discussion but to take account of the specific features of integrated cotton sectors that have provided major progress in french-speaking Africa over the last few decades. By questioning the policy of vertical integration, which for strictly ideological reasons is highly fashionable, it is proposed, he said, that research and extension work could be entrusted to multipurpose state organizations pending the emergence of private agricultural consultancies, and procurement, credit, crop gathering, ginning and marketing could be transferred to the private sector. In all those areas, competition would be established among players and the small grower would be free to compete with bankers, traders, shippers and ginners to obtain the best prices and services. This system he said, is no doubt attractive in principle but completely disconnected from the actual socioeconomic context of the cotton sector in French-speaking Africa. He said it is clear that precipitated privatization would take place to the detriment of the small producer.

Mr. Fichet noted that the concept of privatization is not new to French-speaking Africa and that it is an idea of the 1920s that has already lived its moments of glory. Privatization would be a step backwards for the producers of some countries in Africa, which would have to return to the situation prevalent between the two world wars, when private companies entrusted to grow cotton had mediocre results. Mr. Fichet questioned the underlying motives of those who wish to bring into question a method of production with remarkable results and excel-

lent performance. Finally, he said that the "liberalization" of lint marketing demanded by certain international organizations and applauded by numerous traders has not improved the image of the "West Africa" origin and that what has to be done is to repeat tirelessly that the situation in Africa does not correspond to these pre-established systems, that cotton needs only water and soil to grow and has no need for ideologies, that the position is not to reject all change but to defend a system that has proven itself and remains the most effective way of serving and benefiting the greatest possible number. Mr. Fichet's paper is a Statement of the Meeting.

The CHAIR introduced Mr. S.B. Fisher of Cotpro to present a paper on the exposure of developing countries to fluctuating prices. Mr. Fisher said that addressing the subject of fluctuating prices was really talking about exposure to risk. He said that in Zimbabwe the system of centrally controlled monopoly worked very well for many years and saw fairly stable prices being paid to farmers, risks were minimal and confined to marketing decisions and timing and the government took all risk. Mr. Fisher said that as a result of these arrangements, the grower often did not take advantage of increased returns when international prices were high, noting, that as a result of the lack of incentive to maximize returns, production was affected. During this period, he said, it was not recognized that agriculture is inherently unstable. He said price stabilization measures resulted in unstable incomes, bringing production down 57% between 1983 and 1991 at a time when textile consumption increased 240%. He commented that the situation was not sustainable, and, with state owned enterprises being the biggest contributors to national debt, change had to occur. Mr. Fisher mentioned that in Africa the implementation of economic reform is happening faster than anticipated with large developments in agricultural prices and marketing systems, the cotton sector in Zimbabwe was deregulated in 1994 and this change brought a new relation between the primary producer and the marketing side and government as well. He said that the current system has three major players, the commercialized ex-monopoly Board, which is still government owned, a local commercial company and an international trading company. Now, he said, there is real competition and the returns received by the grower are dictated by market forces. In this perspective he noted the following: The exposure to risk has two sides, that of the primary producer and that of the marketing organization. For the producer there are now a variety of options and incentives available. The grower has to assess the reliability and credibility of the buying organization he is dealing with. He requires a great deal of information in order to minimize risk, needs to calculate a profitable and viable return and fix supply contracts, has to face the reality of price peaks and troughs, has to under-

stand the implications of forward supplying commitments, manage his risk by making decisions on how, when and at what price he should sell, and needs to overcome the exposure of being a smallholder isolated and with difficult access to information. The producer must now rely on marketing organizations to which risk can be transferred.

The key to managing risk is knowledge and information, he added. For the marketing organization there are two dimensions, the institutional and the "software" dimension. On the one hand, the state controlled company in Zimbabwe has a large coverage of ginning facilities, a network of transit depots and collection points, existing expertise and human resources, cash resources, reputation and established markets. By contrast, the new entrant has none of these resources. The new entrant has to establish processing facilities and service the cost of capital, source people, and establish credibility and reputation. It is not an easy task for the new entrant, such as Cotpro, now in its second year of operations. On the other hand, the greatest exposure to risk to the new entrant is in the "software" dimension, Mr. Fisher continued. Because agriculture is a high risk business it is necessary to limit risk and thus the need to introduce risk management techniques that provide a measure of stability and lessen the effects of wide fluctuations of prices. Information, interpretation of data and communication are vital components in predicting trends and to this effect the Internet demonstrates the growth and importance of information exchange. Mr. Fisher added that it is imperative to know yield estimates, consumption, and stocks, and that the ICAC, which is in the information business, must be used by such organizations to assist in projections. The cotton sector in Zimbabwe, in the past, was not able to benefit from risk management tools and the key has been to take advantage of supply for the forward market. Finally Mr. Fisher said that other factors that will contribute to risk management relate to the creation of sustained demand for Zimbabwean products, producing fiber characteristics needed in the market, ensuring minimum contamination, maintaining continuity and reliability of supply and maintaining customer orientation, consistency and credibility. Mr. Fisher's paper is a Statement of the Meeting.

The CHAIR introduced Mr. C.H. Bernhardt, Chairman of CICC, to present a paper on institutional requirements for efficient marketing. Mr. Bernhardt said that institutions involved in the marketing of cotton are of two distinct categories, those who exercise arbitral authority and those who do not and that the existence of CICC is to help maintain the standards of trading practice, offering a service to buyers and sellers alike. He said that CICC associations try to help avoid disputes and that are prepared to arbitrate when disputes arise. He noted that

without mutual agreement there is no contract, but that once there is a contract, it must be honored by both sides. He also noted that arbitration is a process of law practiced first by the Egyptians and now enshrined in the laws of most countries mainly in the model law issued in 1985 by the United Nations Commission for International Trade Law. He also said that the 1990s have seen dramatic changes around the world in cotton trade like in other commodities, that has nowhere this change been more obvious than in the CIS republics. He made the following comments: A combination of political upheaval and liberalization of trade resulted in the emergence of new organizations in many countries; from regulated quota systems several countries moved to virtually free exports, this new freedom implies new challenges and problems. Those who want to be part of the global market must abide by the standards. As an agricultural crop, the quality of cotton will inevitably be subject to the vagaries of nature, but that is not to say that the approach to quality should stand still. It is fortunate to say that the current system to deal with quality disputes is working reasonably well. However, the demise of state trade organizations has left a gap and nations who do not have regard for quality of their exports will lose market share and more generally cotton will lose market share. Mr. Bernhardt mentioned that over the last few years arbitration has become more prevalent and that having a system in place is not in itself sufficient. It is essential to have governments and the trade accept such a system. He also mentioned that governments have an essential part to play in ensuring that courts uphold the principles enshrined in the New York convention on the enforcement of foreign arbitration awards and urged ICAC member governments to accede to the convention if they had not done so yet and to support the letter and spirit of the convention articles. Mr. Bernhardt's paper is a Statement of the Meeting.

The CHAIR recognized Mr. Hurdle H. Lea, President of the American Cotton Shippers Association, to present a paper on risk management strategies for cotton which small farmers can use. Mr. Lea said that there are many risks in the merchandising of cotton, associated with price, quality, credit and the cost associated with delivering cotton to the market. In reference to price Mr. Lea said that price is the most prevalent risk and that price volatility will remain a constant and even increase as the world moves to free trade. Mr. Lea said that many of the price risk strategies used in the United States can be adapted for use anywhere in the world and that the primary tool is the forward contract. He mentioned that the only reliable hedging mechanism to use is the NYCE and that, although only U.S. cotton can be delivered in the NY contract, there is a definite correlation between prices of U.S. cotton and prices of

cotton produced elsewhere in the world. In the absence of a forward contract another possibility is the market for options. Mr. Lea mentioned the possibility of an assortment of strategies for large sellers. In reference to non-price risk factors, Mr. Lea said that quality is a significant risk factor inherent in forward purchases, that there is also price risk in the cost of delivering cotton to the market and that usually the seller is responsible for most of these costs including interest, storage, insurance, transportation and other incidentals, and finally that credit is another major risk that can be minimized by utilizing diligence in sales practice. Mr. Lea's paper is a Statement of the Meeting.

The CHAIR recognized Mr. Neal Gillen, representing the US cotton industry, to present a paper on the need to de-classify cotton as a hazardous material. Mr. Gillen said that cotton is recognized as a hazardous material designated as such by the International Maritime Organization (IMO) and as a result insurance rates are expensive and government regulations require costly and unnecessary paper work. Mr. Gillen also said that over the last five years the U.S. cotton industry has met with the IMO and U.S. Department of Transportation (DOT) officials in an effort to remove cotton from the hazardous material designation and was pleased to report that valid empirical data established no justification for the continuation of the classification of cotton as a hazardous material. He said that the DOT has accepted the findings and will bring this issue for consideration to the IMO in the coming year. Mr. Gillen said that it is imperative that every cotton producing nation actively support the US petition and urged delegates to bring the issue to their government's representative to

the IMO and request that their government support the removal of cotton from the hazardous cargo classification. Mr. Gillen also requested that the 55th Plenary Meeting support this change in classification. Mr. Gillen's paper is a Statement of the Meeting.

The CHAIR opened the floor for discussion and recognized the delegate of ARGENTINA who said that the various presentations illustrated the problems of today with respect to privatization, and the efforts that several countries are making to open and liberalize their cotton economies. He also said that with all the elements that privatization implies there is one that relates to subsidies. The delegate noted that according to his own calculations over 50% of world cotton exports have subsidies attached to them and that, therefore, the effort of privatization is being made only, in essence, by developing countries. The delegate asked for the elimination of all forms of subsidies to cotton in particular in industrial countries so that production and trade could finally be more efficient. The delegate noted that Argentina in its efforts to know more about sophisticated tools for risk management had had the honor to be visited by the Chairman Emeritus of the NYCE this year, but that knowing about the management of risk was not sufficient since the process of opening the cotton economy in Argentina had been very painful. The delegate finally said that opening the world cotton market requires a transparent market without subsidies.

The delegate of TURKEY said that risk management techniques could be mistaken as price protection mechanisms. He said privatization could be successful when prices were high, but that in times of low prices there were difficulties. The

delegate noted the experience of the countries mentioned in the first two presentations omitted the price protection mechanism and that the price protection mechanism was imperative for the success of privatization.

The delegate of BRAZIL aligned his country to the comments of the delegate of Argentina concerning subsidies and noted the importance of the statement concerning the sanctity of contracts. The delegate said that Brazil is on its way to become the largest importer of cotton in the world and that it is worried that liberalization might be dormant. The delegate asked Mr. Bernhardt, Chairman of CICC, to extend his comments referring to the possibility that standards and quality control are in danger of sleeping under liberalization and asked if he was referring to new seed developments, ginning, grading or classing so that countries can determine specific areas that need special attention.

The delegate of AUSTRALIA supported the presentation of Mr. Gillen and asked delegates to take his recommendations to their governments. The delegate asked that this request be reflected in the statement of the Meeting.

The delegate of EGYPT said that privatization need not affect quality. He seconded the motion that cotton be excluded from the classification as hazardous material. He also noted the need to make a clear distinction between qualities, as extra fine qualities may not be marketed in the same channel.

There being no other comments the CHAIR adjourned the meeting at 6:30 pm.

Third Plenary Session

Tuesday, October 8, 1996, 9:00 am
Mr. Abdulkhamit Adylov in the Chair

The CHAIR introduced Mr. J. Berrye Worsham, Cotton Incorporated, USA, to present a paper on the Long-Range Outlook for US and World Cotton Demand. Mr. Worsham began by noting that world cotton consumption rose by 2% per year between 1970 and 1990 but that consumption had been flat at about 18.5 million tons since 1991/92. In trying to determine why world cotton use had been flat for the past five seasons, Mr. Worsham noted that demand is influenced by economic growth, population growth, consumer preferences and fiber price competition. World economic growth slowed marginally to an average of 3% per year between 1990 and 1995, from 3.4% per year during the previous five years. However, in industrial countries

which account for most fiber use at the consumer level, economic growth slowed from 3% per year during the period from 1985 to 1990 to 1.8% per year in the 1990-1995 period. Mr. Worsham also noted that cotton use in the countries comprising the former USSR fell from 2 million tons in 1989/90 to 0.5 million tons in 1994/95; growth in cotton use in the rest of the world rose from 17 million tons to 17.9 million tons over the same period. Thus, half the loss in world cotton consumption, measured as the difference between actual consumption in 1995/96 and an extrapolation of a long run trend, was caused by reduced use in the former USSR. Cotton prices fell relative to prices of polyester in the USA during the 1970s and the first half of the 1980s, but cotton prices have not fallen relative to polyester prices since. Thus, an advantage that cotton enjoyed in competition with chemi-

cal fibers until the mid-1980s has not continued during the past decade.

Mr. Worsham pointed out that cotton's share of world fiber use fell by 4 percentage points between 1990 and 1995, and that most of the gain in market share among competing fibers occurred in polyester filament. He noted that the shift to increased filament fiber use might be caused by pressures to reduce textile and apparel production costs and by growth in carpeting and industrial uses of fibers, market segments that use little cotton and much filament. Mr. Worsham pointed out that factors influencing the supply of cotton also have an impact on cotton consumption. He showed that long run changes in world cotton use are correlated with long run changes in the world cotton yield; periods of rapid growth in yields have

resulted in increased availability which has facilitated increases in use, while periods of slow growth in yields have coincided with periods of slow growth in consumption. The world cotton yield has grown very little since 1986/87 because most countries had adopted known technology by then and only incremental advances have been made since.

In making projections of world cotton use for the next five years, Mr. Worsham noted that IMF forecasts of world economic growth are relatively optimistic at 3.6% per year on average. He estimated that consumption of cotton at the consumer level in the USA could increase by an average rate of 4% during the next five years, and that consumer-level consumption in the rest of the world could rise by a little less than 2% per year. Total cotton use could rise to 20.5 million tons. Based on these projections, cotton's share of fiber use could decline from 45% in 1995 to 43% in 2000 because growth in production capacity for staple and filament fiber is projected at between 8% and 10% per year. Assuming that the world yield increases to 615 kilograms per hectare by 2000, 33 million hectares would be needed to produce 20.5 million tons. Mr. Worsham felt that the Cotlook A Index would need to average 85 cents per pound in order to maintain 33 million hectares of land in cotton during the next five seasons. Mr. Worsham's paper is a Statement of the Meeting.

The CHAIR thanked Mr. Worsham for his report and asked delegates if there were any comments.

The delegate of PAKISTAN asked Mr. Worsham to comment on the elasticity of supply implied by the relationship between cotton prices and area in his report. Mr. Worsham reported that his work suggested that a 10% increase in the Cotlook A Index led to an increase of 1.7% in world cotton production.

The delegate of EGYPT asked whether the effects of changes in income and prices on consumption had been considered simultaneously. The delegate also asked whether the Cotlook A Index served as a useful indicator of prices of cotton from Egypt. Mr. Worsham answered that income and price effects on consumption were considered simultaneously in the work he had done, but the Cotlook A Index did not serve as a useful guide to prices of extra-fine cotton.

The CHAIR introduced Mr. Jarral Neeper, Calcot Ltd., USA, to report on the Outlook for Cotton Production and Prices.

Mr. Neeper reported that wheat and coarse grain stocks were at record lows relative to use during the past season and that grain prices had been unusually high. World grain area rose in 1996 because of high prices, and further increases in area might be necessary to meet projections of grain consumption during the next five years.

Increases in area devoted to grain production could lead to reductions in cotton plantings. Further, costs of producing cotton seem to be rising because of increases in input costs.

Mr. Neeper felt that over the long run, cotton production would have to equal consumption. He noted that world consumption was likely to rise to 89 million bales (19.4 million tons) by 2000. Production of that much cotton would require between 33 million and 35 million hectares at average yields. Based on data from 1966 to 1995, cotton farmers need to receive about \$1,100 in gross revenue per hectare (price per kilogram of lint times kilograms per hectare of production) to result in world area of as much as 35 million hectares. At likely cotton yields, the Cotlook A Index will need to average between 80 cents and 85 cents per pound. Regions of the world in which increases in cotton area are likely include West Africa, Turkey, Syria, the EU, Argentina and Paraguay, and Australia. Lower area is possible in Central Asia, China (Mainland) and North America, and the area devoted to cotton will not likely change in South Asia. Mr. Neeper's paper is a Statement of the Meeting.

The CHAIR thanked Mr. Neeper and asked delegates if there were any comments or questions. There were none. The CHAIR asked delegates for comments on the cotton situation in their countries.

The delegate of EGYPT thanked the Government of Uzbekistan for hosting the Plenary Meeting and the Secretariat for its organizing work. The delegate noted that Egypt began a process of liberalization of the cotton sector in 1994 with the passage of three laws designed to free the internal market from price controls, open the cotton economy to world trade and to resume trading on the cotton market in Alexandria. Cotton area in 1995/96 was 710,207 feddans (298,000 hectares), and production fell to 4.76 million cantars (238,000 tons). The government guaranteed an attractive minimum price to farmers in 1996 to stimulate increased production, and area has increased to 930,000 feddans (391,000 hectares); production is estimated at 7.3 million cantars (365,000 tons), the highest in three seasons. Farmers may sell to any of 160 licensed private traders or cooperatives, and the government has established 690 cash markets throughout the country. The domestic spinning industry may import as much as they desire from any origin, subject only to sanitation requirements, and mill use is estimated at 5 million cantars (250,000 tons). The government has an interest in insuring that spinning mills have adequate supplies of cotton. Traders may export or import as much cotton as they wish, provided that minimum export prices are observed. The export policy is aimed at exporting 1.6 million cantars (80,000 tons) in 1996/97; Egypt is determined to maintain a traditional share of world

extra-fine exports. Nineteen private sector companies comprise the exporter's association; a committee of association members meets weekly to establish export prices taking into account competitive conditions. The government has established a price stabilization fund; the fund will be used by the government to purchase cotton should market prices fall below an acceptable threshold. The quality of Egyptian cotton remains excellent. Egypt's country report is a Statement of the Meeting.

The delegate of JAPAN expressed concern about the maintenance of cotton quality. He noted that new spinning technologies required cleaner cotton and higher quality cotton, and he urged producing countries to be mindful of the need to maintain proper storage facilities and efficient marketing systems and to produce high quality cotton. Because of high prices for cotton and increased imports of textile products, mill use of cotton in Japan fell 15% to 354,000 tons in 1995. Contributing to the decline in mill use of cotton, cotton's share of fiber consumption in Japan fell from 50.4% in 1991 to 47.6% in 1995. Because of high costs and the need to restructure the textile industry, lower mill use is expected in 1996. Japan's statement and country report are Statements of the Meeting.

The delegate of the PHILIPPINES thanked the Government of Uzbekistan for the cordial welcome extended to guests and the Secretariat for helping to organize the Meeting. The delegate reported that cotton production in the Philippines was adversely affected by the inability of cotton growers to qualify for bank financing, insufficient extension services, falling cotton prices and low yields. The domestic industry consumes 70,000 tons of cotton per year, but less than 10% is produced locally. However, implementation of the Cotton Development Enhancement Program will be pursued with greater vigor, and the target for planted area is 10,000 hectares in 1996/97. The Philippines' country report is a Statement of the Meeting.

The delegate of CAMEROON thanked the government of Uzbekistan and the Secretariat for the excellent preparations for the Plenary Meeting. The delegate noted that cotton plays an important role in the social and economic development of Northern Cameroon. The Government of Cameroon created SODECOTON in 1974 to contribute to the development of the cotton industry by supplying cotton farmers with selected seeds and inputs on loan, by giving adequate technical training to farmers, by purchasing on an exclusive basis the seed cotton from farmers at guaranteed prices and then ginning and marketing the resulting lint, cottonseed oil and cake. The objectives of SODECOTON have been achieved over the years, and production reached 195,000 tons in

1995/96. Cameroon's country report is a Statement of the Meeting.

The CHAIR recognized Mr. Wayne Bjorlie, Farm Services Agency, USDA, USA to make a presentation on the Role of Government Policies. Mr. Bjorlie discussed the impacts that the new US farm program might have on the cotton industry. He noted that farmers in the USA are facing challenges similar to the challenges faced by farmers in Uzbekistan. The new US farm law challenges farmers to hone skills as a producer, to reduce costs of production and to increase yields without degrading the long term productivity of the farm. Past farm laws in the USA were designed to support farm income through direct payments to farmers and through minimum prices for crops; the government payments, and the formulas used to calculate payments to each farmer, provided a disincentive to respond to market signals. Under the new law, payments to each grower are fixed, and nothing the farmer can do will affect the amount of money received from the government. Farmers must now base planting decisions and decisions regarding input use on market signals. The government will no longer establish acreage reduction programs as a condition of program participation. The new law is in effect from 1996 through 2002, and aggregate payments to cotton farmers will decline from \$650 million in 1996 to \$465 million in 2002.

Mr. Bjorlie added that the new law retained the loan rate, marketing loan and competitiveness provisions from previous legislation. The loan rate is set at a minimum of 50 cents per pound and a maximum of 51.92 cents. The formulas used to calculate the marketing loan and competitiveness provisions are the same as before, although the implementation of Step 2 payments to exporters has been modified.

Mr. Bjorlie reported that the new law will not likely have a material impact on the position of the US in the world cotton industry. USDA believes that world cotton consumption will rise to 110 million bales (24 million tons) over the next ten years and that sufficient cotton area is available to meet that projected level of demand. In the USA, cotton area is likely to remain in a range between 13 million and 15 million acres (5.3 million to 6 million hectares), and US production is likely to continue to account for about 20% of world production. Mr. Bjorlie's paper is a Statement of the Meeting.

The CHAIR thanked Mr. Bjorlie and asked if any delegates had questions or comments. The delegate of AUSTRALIA thanked the government of Uzbekistan for hosting the Meeting and thanked the Secretariat for the preparations. The delegate noted that Australia was encouraged by the direction of the new US farm law and asked, given this direction, whether the marketing loan

and competitiveness provisions were likely to be modified in the future.

Mr. Bjorlie answered that the new law is in effect until 2002 and there appears to be little interest in changing the law at this time. He added that the marketing loan has been rendered essentially ineffective in the current environment because the loan rate, currently 51.92 cents per pound, is lower than market prices. He also noted that the recent change in the rule implementing the Step 2 payments to exporters has already addressed some of the problems identified by Australia in the administration of that provision.

The CHAIR recognized Ms. Galina Fisher and Mr. Ray Butler, Cotlook Ltd., UK to present a paper on Cotton Price Measures: Modernizing the Cotlook A Index. Ms. Fisher outlined the history of the Cotlook A Index. She noted that it was compiled and produced by Cotlook Limited, an independent company owned and operated by its directors, each having no position in the cotton market. The Index was begun in the 1960s to reflect realistic offering rates provided to buyers in North Europe. The Index is calculated as the average of the five cheapest elements from a basket of quotes on each day. By averaging cheaper quotes from a basket of several, the impact of quirks in individual quotes can be mitigated—a point which Uzbekistan might wish to note.

Mr. Butler noted that the directors of Cotlook Limited are keen to reflect changes in the patterns of world cotton trade in the quotations used to compile the Cotlook A and B Indexes. For instance, Cotlook experimented with a CIF Japan equivalent of the A Index in 1988, but the exercise was abandoned when it became clear that differences with the North Europe Index were minimal. An effort in recent months to develop an index based on Far East destinations failed to develop satisfactorily. As a consequence, the indexes will continue to be based on North Europe delivery. However, three changes will be made to the constituent quotes eligible for calculation of the Cotlook A Index in 1997/98. The quote for Tanzanian Type 3 will be replaced by Tanzanian roller ginned Gany, Type 2. The quote for Indian H-4 will encompass Mech-1 as well. And quotes for Central Asian cotton will be replaced with quotes for cotton from Uzbekistan, reflecting Uzbekistan's leading role within Central Asia and the progress made since independence in developing an efficient marketing system. The paper presented by Ms. Fisher and Mr. Butler is a Statement of the Meeting.

The CHAIR thanked the representatives of Cotlook Ltd. for their presentation and asked delegates for contributions from member countries regarding the production and consumption of cotton. The CHAIR recognized the delegate of PAKISTAN.

The delegate of PAKISTAN noted the difficulties caused by the leaf curl virus on production in Pakistan since 1992. He reported that new varieties with increased resistance to the virus will be introduced. Cotton area in Pakistan rose to 3.1 million hectares in 1996/97, and the production target of ten million bales (1.7 million tons) will likely be reached. Production in the state of Punjab is being affected by the virus and by whitefly this year. Despite problems with disease and pests, cotton still has an advantage over other crops in Pakistan. Farms that are properly managed are largely able to overcome the impacts of the disease and pests. Pakistan's country report is a Statement of the Meeting.

The delegate of ARGENTINA reported that cotton production in Argentina is occurring in an environment of economic liberalization. Production in 1995/96 is estimated at 425,000 to 430,000 tons. The use of mechanical harvesters is increasing, and significant new investments are being made in the cotton industry. The boll weevil was discovered in two departments in Argentina in 1994, and effective control measures have kept the pest in a small area. An Integrated Boll Weevil Management program involving Argentina, Brazil and Paraguay is underway with financing from the industry, government and financial entities. Cotton use declined from 143,000 tons in 1990/91 to an estimated 105,000 tons in 1995/96 due to growth in imports of textile products under the opening of the Argentine economy. Cotton area in 1996/97 could be as high as one million hectares, and lint production could be as high or higher than in 1995/96. Argentina's country report is a Statement of the Meeting.

The CHAIR introduced Mr. Gerald Estur, Copaco, France, to deliver a paper on Changes Taking Place in the Cotton Market.

Mr. Estur commented on the emergence of Uzbekistan and countries in Latin America as major exporters of cotton during the past five years. He also noted that Greece, Argentina, Australia and West Africa are exporting more cotton than in previous years, while Central America is now less active. Imports by Indonesia have risen, while exports of cotton from Pakistan have been offset by increases in textile exports. Several producing countries are simultaneously importing and exporting cotton, signaling the globalization of the cotton industry. He pointed out that no one forecast that the US would import 200,000 tons in 1996. Mr. Estur also noted that the number of participants in the world cotton market has increased because of the disappearance of monopolies in many countries. Other changes in the cotton market include the opening of trans-Asian transportation routes to facilitate the movement of Central Asian cotton and the adoption of new technology which speeds communication with clients.

The use of containers in shipping cotton is becoming more common. The efficiency of the ginning industry is rising.

Mr. Estur pointed out that even though three organizations endeavor to report on conditions in the world cotton economy, uncertainty continues to affect the industry, particularly in regard to events in China (Mainland). Confidence in the world cotton industry can also be undermined by firms which fail to fulfill contract obligations. Changes in the US cotton program will make predictions of area and production less precise. Mr. Estur added that the New York futures market does not always reflect market conditions outside the USA. The difference between futures and cash prices for non-USA cottons can vary by more than 20 cents per pound in a season, making it difficult to hedge prices of non-USA cotton. Mr. Estur's presentation is a Statement of the Meeting.

The CHAIR introduced Mr. Carlos Valderrama, Secretariat, to present a paper on Cotton's Share of Market. Mr. Valderrama reported that world cotton consumption fell by 100,000 tons between 1990 and 1995 and that cotton's share of fiber consumption fell from 50% in the mid-1980s to 45% in 1995. He pointed out that changes in prices of cotton and competing fibers accounted for one-third of the loss in market share over the ten year period, and that nonprice factors, such as consumer preferences, the development of new uses for cotton and changes in textile technology accounted for two-thirds of the loss. He pointed out that the largest losses of market share have been registered in Eastern Europe, the former USSR and in developing countries. Cotton's market share in industrialized countries increased from 1986 to 1995, but only because of an increase in North America. Mr. Valderrama pointed out that cotton promotion programs might explain the strength of cotton's nonprice competitiveness by region. With the exception of the United States, cotton promotion programs have been greatly reduced or discontinued in industrial and developing countries since 1990. Mr. Valderrama's paper is a Statement of the Meeting.

The CHAIR thanked Mr. Estur and Mr. Valderrama for their papers and asked delegates for comments or questions. The delegate of PAKISTAN asked for the specification of the econometric model used to isolate the impacts of price and nonprice competitiveness on cotton's loss of market share. Mr. Valderrama explained that the model specification is published in *WORLD TEXTILE DEMAND*, a report prepared by the Secretariat for the Plenary Meeting.

The delegate of EGYPT asked whether changes in cotton's market share in countries is related to the income elasticity of demand, and he asked whether the Secretariat model of fiber demand includes linkages between oil prices, the prices

of chemical fibers and cotton's market share. Mr. Valderrama answered that over the last ten years, nonprice factors accounted for most of the decline in market share, and circumstantial evidence suggests that promotional activities can reduce the rate of decline. Regarding linkages between oil prices and chemical fiber prices, Mr. Valderrama noted that polyester prices appear closely linked to cotton prices, rather than being a function of input costs.

The CHAIR asked for contributions from member countries.

The delegate of CAMEROON said that Mr. Valderrama's paper contained information of great interest to the cotton industry and that further discussions on the ways and means to arrest the decline in cotton's market share should be included on the Agenda of the next Plenary Meeting.

The delegate of UGANDA thanked the Government of Uzbekistan for hosting the Plenary Meeting and the Secretariat for meeting preparations. The delegate reported that Uganda continues to liberalize the cotton sector. Research to improve seed varieties is ongoing, and efforts are underway to improve the ginning industry and to provide better technology to farmers. Cotton production is expected to rise from 6,000 tons in 1994/95 to 10,000 tons last season and to 15,000 tons in 1996/97. The ginning industry is in the last stages of restructuring, and most gins have been divested to private companies. Uganda's experience with privatization has been generally positive to date. Experience indicates that the interests of farmers can be protected through competition among buyers of seed cotton. He added that it appears that it will be possible to maintain cotton quality despite the deregulation of the industry. In Uganda, the government takes responsibility for seed certification, research and extension and monitoring of the industry. Private industry is providing other services. Uganda's country report is a Statement of the Meeting.

The delegate of SPAIN thanked the Government of Uzbekistan for its hospitality at this meeting and the Secretariat for efficient meeting preparations. The delegate reported that production in Spain is increasing after the end of a four-year drought. With the increase in production, a reduction in imports may occur. Spain's country report is a Statement of the Meeting.

The delegate of BRAZIL thanked the Government of Uzbekistan and the Secretariat for hosting and organizing the Plenary Meeting. The delegate commended the speakers during the Third Plenary Session and noted that the decline in cotton's market share is a matter of concern. He said that more attention needs to be devoted to this problem. The delegate reported that Brazil expects to continue importing a large amount of cotton in the near term. Economic policies

that have reduced inflation to less than 1% per month are placing upward pressure on labor costs and cotton production costs. Most cotton in Brazil is picked by hand. Cotton area fell by 20% in 1995/96, and a decline of as much as 30% may occur in 1996/97. The Government of Brazil is encouraging increased mechanization and a shift in production to new areas appropriate to mechanical picking. Seed breeding is receiving renewed interest, and the industry expects production to recover enough by 2000 to meet the needs of a growing textile industry. Brazil's country report is a Statement of the Meeting.

The delegate of CHAD pointed out that some favorable comments regarding the impacts of privatization on the cotton industry had been based on observations over a short period of time. The delegate suggested that additional study of the long run impacts was needed. In particular, the delegate noted that recent experience with privatization occurred in an environment of favorable cotton prices and that additional study was needed regarding how small farmers could be protected from the impacts of downward movements in prices. The delegate agreed with other delegates that a discussion of means to improve the market share of cotton should be included on the agenda of a future Plenary Meeting. He thanked the Government of Uzbekistan for the preparations for this meeting and he thanked the Secretariat for their efforts.

The delegate noted that one-third of the population of Chad depends on cotton for part of their income, and that cotton accounts for 70% of export revenues. The cotton company in Chad is a mixed-ownership company with the right to buy and process all seed cotton. Purchase prices paid to farmers have increased since devaluation. Chad is working to improve the quality of its cotton and to meet contract specifications. Nine gins are now in operation capable of producing 100,000 tons of lint per season. All cotton is hand picked. Production in 1996/97 is estimated at 80,000 tons. Chad's country report is a Statement of the Meeting.

The CHAIR thanked the delegate of Chad for his comments regarding the need to study carefully the impacts of privatization.

The delegate of MALI thanked the Government of Uzbekistan for hosting the Plenary Meeting and the Secretariat for its work. He said Mali is pleased to be a member of the Committee and looks forward to sharing experiences and knowledge with other member countries. Cotton is the cornerstone of the economy in Mali, accounting for 65% of foreign exchange earnings. Current production is 160,000 tons of lint, and an increase of 20% is expected in the next few years. Providing adequate credit for the purchase of inputs, reducing

the costs of cotton production and protecting the economic interests of growers are the most important initiatives needed to sustain farmers in Mali. Mali's statement and country report are Statements of the Meeting.

The delegate of SOUTH AFRICA thanked the Government of Uzbekistan for hosting the Plenary Meeting. Drought reduced production in South Africa during the four year period from 1991/92 through 1994/95, but rains at the start of 1995/96 boosted production prospects. Production in South Africa in 1995/96 supplied 60% of the needs of domestic spinners, a relatively small proportion reflecting the lack of confidence in cotton among producers after four years of drought. Mill use of cotton in South Africa fell 8% in 1995 but growth is expected this year. The textile and clothing industries remain under pressure from legal and illegal imports. He said the lint price in South Africa is negotiated by a committee of farmers, ginners and spinners. The agreement is voluntary; the Cotton Board acts as the secretariat to the committee. The price paid to farmers for seed cotton is derived from the lint price paid to the ginner. The gins are privately owned and compete for the farmer's seed cotton. It has been observed that during periods of tight supply, competition among gins for volume leads to a reduction in the margin between lint and seed cotton prices. After four years of stagnant prices, the lint price rose by 24% in 1994/95 and 16% in 1995/96; the latest price is about 75 US cents per pound.

The delegate reported that two important events affecting the cotton industry are taking place in South Africa. The passing of a new agricultural marketing act will virtually eliminate the single channel marketing of agricultural products which compete with cotton. Cotton has always been exposed to the influences of international pricing, while grain farmers have enjoyed greater price stability in the past. A second development is the negotiation of free trade agreements with other countries in Africa and the EU, and tariffs will be phased out in the future. Privatization and commercialization of the cotton industries in Southern and East Africa is taking place at a rapid pace, and there is an increased need for cooperation and consultation among countries in this region. The Southern and East Africa Cotton Forum was formed during the 1995 ICAC meeting in Manila with the objective of exchanging information related to cotton production, and two meetings of the Forum were held in 1996. Members include Zimbabwe, Zambia, Tanzania, Uganda, Malawi, Mozambique and South Africa. South Africa's country report is a Statement of the Meeting.

The delegate of TURKEY thanked the Government of Uzbekistan and the Secretariat for the Plenary Meeting preparations. The textile and clothing sectors are important to the Turkish economy, accounting for 80% of industrial em-

ployment. Turkey is the 9th largest supplier of textiles and clothing in the world. Because of rapid growth in mill use of cotton, Turkey imported 158,000 tons in 1995/96; mill use is expected to grow from 900,000 tons in 1995/96 to 950,000 tons this season. New investments in the textile industry and strong demand for products from Turkey are leading to increased use of cotton, and growth is expected to continue. No price support activities were undertaken by the cotton cooperative unions in 1995/96; competition with private industry led to upward revisions in prices paid to farmers last season. The Southeastern Anatolian Project will bring 1.7 million hectares under irrigation upon completion and will lead to an increase of as much as 50% in cotton production in Turkey. The by-laws establishing the Izmir Cotton Futures Exchange were published in August 1996. Implementation of the Cotton Futures Exchange will be beneficial to producers and spinners in Turkey and foreign traders as well. The 1996/97 Turkish export policy has been set, and no quotas or export levies will be applied. Turkey's statement and country report are Statements of the Meeting.

The delegate of INDIA thanked the Government of Uzbekistan and the Secretariat for their work in hosting and organizing the Plenary Meeting. The delegate endorsed the recommendation of the delegate of Cameroon regarding the need to discuss ways to arrest the decline in cotton's market share. The delegate noted that it is the policy of the Government of India to guarantee fair prices to farmers while also providing adequate supplies to the textile sector, including the hand loom sector. Cotton production in India increased at an average rate of 5% per year during the last decade, and area rose to 8.31 million hectares in 1995/96 while production reached 2.66 million tons. He said a report by the Secretariat in documents prepared for the Plenary Meeting indicating that cotton area in India had fallen in 1996 is not correct; cotton area has risen, possibly to more than 9 million hectares. The delegate noted that mill consumption of cotton increased by 10% to 2.36 million tons in 1995/96, mainly because of the installation of new spinning units and improvements in textile exports. About 79 new spinning units came into production during the last year.

The delegate reported that exports of cotton from India are regulated to strike a balance between the interests of cotton growers and the textile sector. During 1995/96, the government released an export quota of 270,000 tons. Imports of cotton were placed under Open General License with zero import duty in 1993/94 and remain in that category yet; mills in India are free to import cotton from anywhere. In 1996/97, cotton production may be as great as 3 million tons and export quotas have already been announced. India's country report is a Statement of the Meeting.

The delegate of PARAGUAY thanked the Government of Uzbekistan for its hospitality in hosting the Plenary Meeting. The delegate reported that cotton is important to the economy of Paraguay, supporting employment and providing cottonseed oil as well as lint for export. Government policy is focused on improving yields as well as expanding area devoted to cotton. Planting seeds are being imported from Argentina this year to insure an adequate supply. The government is implementing a program of seed production and seed industry liberalization, and fourteen seed producers are active now. A comprehensive pest management plan is being developed and yields may rise to between 600 and 700 kilograms per hectare. Boll weevil is a serious concern in Paraguay, and a control program with Argentina and Brazil is underway. Programs are aimed at increased cooperation with Argentina to coordinate the development of varieties and management practices. The delegate noted that government involvement in the financing and marketing of cotton has been reduced and laws to encourage private sector involvement in the market are being implemented. The delegate of Paraguay welcomed delegates to the 56th Plenary Meeting of the ICAC in Paraguay next year. Paraguay's country report is a Statement of the Meeting.

The delegate of SUDAN thanked the Government of Uzbekistan for the efforts made to make this meeting a success. He also thanked the Secretariat for their work in making preparations for the meeting. The delegate reported that the Government of Sudan continues its policy of expanding cotton production and area. 50% of total production will be set aside for exports. Taxes have been reduced and will not exceed 20% of total production costs in the rainfed areas and 15% in the irrigated areas. Instructions have been issued to banks to reduce financial burdens on farmers. Cotton area increased from 223,000 hectares in 1995/96 to an estimated 334,000 hectares in 1996/97. During 1996/97, production is expected to rise 29% to 134,000 tons; better yields are expected after insect attacks and water stress affected the crop in 1995/96. Domestic consumption rose to 14,000 tons in 1995/96, the highest in three seasons but lower than the 24,000 tons consumed in 1985. Domestic mill use is improving because of progress in providing credit, a better supply of electricity and improved operating efficiencies.

The delegate of SUDAN also referred to the declining share of cotton use in world fiber use and said the loss of market share is a red flag to the industry. The delegate suggested that ways be considered to improve cotton use. Sudan will continue its marketing policy of soliciting open international bids to reflect the true value of cotton. Sudan's statement and country report are Statements of the Meeting.

The CHAIR thanked the delegate for his comments, including the delegate's concerns about cotton's market share. The CHAIR noted that while cotton has lost market share, total cotton use has not yet declined materially.

The delegate of GERMANY thanked the Government of Uzbekistan for hosting the Plenary Meeting and the Secretariat for the preparation of papers for the meeting. The delegate was sorry to announce that Dr. Joseph Schraven was ill and was unable to attend the meeting. He also reported that Germany had been authorized by the Government of Belgium to represent Belgium at the Plenary Meeting. The delegate asked the CHAIR for permission to introduce Mr. Gerd Schoeller, Vice President of the Bremen Cotton Exchange, who wished to make a short statement on conditions affecting the spinning industry.

The CHAIR recognized Mr. Schoeller who noted that the classic quality criteria of staple length, color and micronaire are the normal basis for determining the value of cotton. However, problems had become apparent recently with the increased incidence of seed coat fragments and stickiness in cotton from many countries. Mr. Schoeller urged producing countries to take care to reduce these problems. He noted that optimized ginning is essential to the survival of

cotton as the majority fiber. Germany's country report is a Statement of the Meeting.

The CHAIR thanked the delegate of Germany and Mr. Schoeller for their comments and agreed that attention to these problems was called for.

The delegate of TANZANIA reported that cotton plays an important role in the economy of Tanzania and is the second largest foreign exchange earner; activities associated with cotton employ 18% of the rural population. The Tanzania Cotton Lint and Seed Board (formerly the Tanzania Cotton Marketing Board) is primarily a regulatory body in charge of quality control and serves as an advisor to government on matters related to cotton. The government is rapidly reducing its involvement in the production, marketing and processing of cotton, and the burden of assuming these functions, including the provision of inputs to producers, is falling increasingly on private industry. Seed cotton buyers and ginners have been urged to provide credit to growers for the purchase of inputs, and some buyers have started providing inputs on credit. However, the process is proceeding slowly because the arrangements are new to both borrowers and creditors. Tanzania's country report is a Statement of the Meeting.

The delegate reported that it is hoped that market forces will lead to greater efficiency in resource

allocation. Cotton production rose from 43,000 tons in 1994/95 to 86,156 tons in 1995/96, and the private sector is investing substantially in the construction of new ginneries. However, there have been some problems with privatization, including the evasion of levies intended to finance the rehabilitation of rural roads and provide medical services. There have also been instances of flouting of cotton regulations and frustration of seed multiplication programs by some private cotton buyers. The delegate noted that cotton production is forecast to fall slightly to 72,000 tons in 1996/97 because of unfavorable weather, but growth is likely in the future and output could rise to double the current level by 2000.

The delegate of the US thanked the Government of Uzbekistan for hosting the Plenary Meeting and the Secretariat for helping to organize the meeting. The delegate noted that the USA country statement was being distributed to delegates and, in the interest of saving time, ended his remarks. The United States' country report is a Statement of the Meeting.

The CHAIR thanked all delegates for their contributions and closed the Third Plenary Session at 6:15 pm.

Fourth Plenary Session

Tuesday, October 8 1996, 6:15 pm
Mr. Abdulkhamit Adylov in the Chair

The CHAIR invited contributions from observers and international organizations and recognized the Chairman of the Committee for International Cooperation Between Cotton Associations (CICCA). The representative of CICCA said that he had already expressed his views in the 2nd Plenary Session. Concerning a question asked by the delegate of Brazil, he said that contamination by foreign matter is a great and constant concern to the industry. He said that farmers and ginners on their own cannot resolve the contamination problem but rather actions at government levels are needed. Otherwise, he noted, cotton's share of market would continue to fall. His remarks are a Statement of the Meeting.

The CHAIR recognized the representative of the International Textile Manufacturers Federation (ITMF), who stated that a comprehensive statement had been given to the ICAC Secretariat for distribution (the ITMF report is a Statement of the Meeting). He thanked the ICAC and the Government of Uzbekistan for the invitation to the 55th Plenary Meeting. The ITMF repre-

sentative referred to its committees: International Committee on Cotton Testing Methods and Spinners Committee. The International Committee on Cotton Testing Methods as usual met in Bremen in March 1996 and decided to publish guidelines for the use of HVI. The guidelines are near completion and will be made available before the end of 1996. The Spinners Committee continued its program and visited francophone African countries for the second time. He thanked the CFDT, COPACO and the national cotton companies in Chad, Cameroon and Benin for their help in arranging visits. The representative of the ITMF said the Chairman of the Spinners Committee wished to respond to remarks made on quality. Mr. Andrew Macdonald, the Chairman of the ITMF Spinners Committee, which is made up of representations of countries comprising 75% of the world's cotton consumption, stated that cotton is not keeping up with the modern textile industry. Modern textile machinery has reduced the cost of labor and thus has put more stress on the quality of raw material. Manmade fibers can meet the challenges; cotton must also. He said that, while developing new varieties, breeders should not only look for high yield but take into account the needs of the

textile industry. Giving the example of the USA, he said that not only promotional campaigns but improvements in fiber quality have a positive effect on market share.

The representative of CIRAD-CA, France, stated that significant improvements have been made by researchers to improve cotton yields in the world. But, due to inefficient ways of communication of knowledge, the information has not been properly utilized. Lack of effective communication from researchers to users and mobilization of cotton companies or farmers associations and lack of favorable socio-economic conditions are usually responsible for poor dissemination of research findings. The representative of CIRAD-CA also referred to new biotech approaches which, according to him, may even widen the yield gaps among producing countries. CIRAD-CA's report is a Statement of the Meeting.

The CHAIR adjourned the Fourth Plenary Session at 6:35 pm.

A statement from the European Union was received after the close of the session and is included as a Statement of the Meeting.

Fifth Plenary Session

The Fifth Plenary Session was cancelled due to time constraints. Scheduled presentations were made at the Technical Seminar and are Statements of the Meeting under the Fifth Plenary Session.

Closing Plenary Session

Friday, October 11, 1996, 11:30 am
Mr. Utkur Sultanov in the Chair

The CHAIR informed delegates and observers that the Steering Committee had adopted a Statement of the 55th Plenary Meeting, which had been distributed. He said he was very proud that it was on Uzbek land that these important decisions were taken to promote and develop the cotton industry. The Statement, he said, was a long term instrument clearly stating the current situation in the cotton world and serving as a plan of action for the future. He said he looked forward to seeing delegates again the last week of October 1997.

The CHAIR asked delegates for their final comments.

The delegate of ARGENTINA addressed delegates and observers, as well as the people of Tashkent and Uzbekistan, in stating his satisfaction with having attended the 55th Plenary Meeting in Uzbekistan. He said the world cotton economy is moving to a healthy and favorable environment. He noted that delegates had worked diligently and responsibly, seeking to avoid confrontation. He thanked the organizers of the Meeting and the people of Uzbekistan and its government for the interest they displayed in the comfort of visitors. He said he had become aware of the spirit and progress of the culture of the Uzbek nation. The delegate also commented on his satisfaction with the work of the Executive Director and the Secretariat staff.

The delegate of TURKEY, on behalf of his delegation, thanked the government of Uzbekistan for their arrangements and kind hospitality during the 55th Plenary Meeting, which provided many unforgettable experiences. He said the inauguration by President Karimov honored the Committee, as well as the presence of Mr. Sultanov in the Chair. He recognized the work of the Vice Chairman and extended greetings to the ICAC Secretariat for their work.

The delegate of CHINA (TAIWAN) expressed deep appreciation to the people and government of Uzbekistan for hosting the 55th Plenary Meeting in Tashkent. He said the conduct of business by the Chair insured the success of the Meeting. He thanked Dr. Shaw and his colleagues for their

hard work in making preparations and said he looked forward to seeing delegates in Paraguay next year. He wished all participants success and prosperity in the meantime.

The delegate of PARAGUAY extended greetings to the government and people of the wonderful country of Uzbekistan, which he said he was visiting for the first time enjoying the city's gardens and clean streets. He thanked the Secretariat, interpreters and all participating in the Meeting for their efforts. He said he would be glad to welcome participants in Asuncion next year.

The delegate of SOUTH AFRICA thanked the people and government of Uzbekistan for their hospitality. He thanked the Chair for his time and competent direction of the Meeting. He expressed thanks to the Executive Director and his team, whose competence in accomplishing the work of the Committee is taken for granted by delegates. He also thanked fellow delegates for their efforts and expressed the hope that the decisions taken during the 55th Meeting will lead to our ability to direct our time and attention toward the development of cotton.

The delegate of SUDAN thanked the government and people of Uzbekistan for hosting the 55th Plenary Meeting. The Sudanese delegation appreciated the efforts of the Chair in the deliberations which had positively been reflected in the decisions taken, for which Sudan was grateful. He said the work was performed in a cordial and sound atmosphere expressing an interest in developing the production and industry of cotton. He said he could not forget to extend thanks to the Executive Director and his colleagues for their patience, hard work, diligence and high efficiency. He also thanked the interpreters and others who had worked to take care of the needs of the participants in the meeting. He wished success, progress and prosperity to all, to the people and government of Uzbekistan and to his fellow delegates.

The delegate of BRAZIL expressed the appreciation of his delegation for the work of the Chairman, Vice Chairman, the Secretary General and staff of ICAC, and for the warm hospitality of the people of Uzbekistan. He looked forward to the next meeting in Paraguay.

The delegate of CHAD extended to the people and government of Uzbekistan a word of appreciation for their help and organization and for opening their rich culture to participants in the Meeting. He said the issues debated and the consensus which was reached showed that we hope to maintain the world cotton economy in a healthy state. He expressed his appreciation to the Secretariat, who made the meeting a success. He said he was honored by the presence of the Prime Minister as Chair, as well as his interest in cotton.

The delegate of COLOMBIA joined others in the words of thanks to the people and government of Uzbekistan. He also congratulated the Chair and Vice Chair for their able management of the sessions which concluded in positive results. He thanked Mr. Shaw for his productive work. He hoped that all decisions of the Meeting would be followed and that delegates would be able to talk in future meetings about cotton matters in which all were interested.

The delegate of EGYPT joined delegations in expressing gratitude to the President of Uzbekistan, Islam Karimov, and to the Chairman, for running the meetings efficiently. He also thanked the Executive Director who performed his duties admirably. He said a number of resolutions, both technical and administrative, were taken at the Meeting and added that he was glad that these matters had been settled. He expected the ICAC would be able to continue its function of promoting the marketing of cotton.

The delegate of INDIA spoke on behalf of the Indian delegation, the government of India and himself to express sincere thanks to the government of Uzbekistan and its people for their kind and warm reception. He expressed appreciation for President Karimov's inaugural address and for the picture of the Uzbek cotton industry and culture given to delegates. He noted the progress being made and the good prospects for the future. He thanked the Chair for his conduct of the Meeting. He said the actions taken will allow the organization to take its rightful place in the world cotton industry and trade, where it deserves to be. He thanked Mr. Shaw and the Secretariat for their excellent work. He expected that next year's meeting would lead to similar constructive and good decisions toward

maintaining cotton's share in the world economy.

The delegate of PAKISTAN said his government shared a common heritage with that of Samarkand and Bukhara. He said he had paid homage to Amur Timur and others in Uzbek history. He congratulated the Chair on his conduct of the meeting and the Executive Director and Secretariat for their patience in presenting the issues in a clear manner. He thanked the Chair for his keen interest in cotton and looked forward to seeing him in Pakistan.

The delegate of the UNITED KINGDOM expressed appreciation for the warm reception delegations had received in Tashkent. He recognized the contributions of President Karimov, the Chairman and the Vice Chairman. He extended thanks to the Executive Director and the staff of the Secretariat for their work during the meeting and the past year. He wished delegates prosperity and happiness in the year to come.

The delegate of the PHILIPPINES joined all the delegations in their appreciation and thanks for the hospitality shown to delegates. He recognized the progress taking place in Tashkent day by day as a sign of the development of the

country. On behalf of the Standing Committee, he thanked the Chairman for his able handling of issues which will help members of the Committee clarify their duties in the year to come.

The delegate of JAPAN thanked the government of Uzbekistan on behalf of the Japanese government. He also thanked the Secretariat. He said he was convinced that the resolutions made would be helpful in matters of world trade in the future.

The delegate of AUSTRALIA complimented the Chair and Vice Chair and the Secretariat for their able running of the Meeting. He said he had come from far away and appreciated the warm reception of the people of Uzbekistan.

The delegate of the USA said the government of the United States wished to thank the Chairman, his government and people of Uzbekistan for hosting the Meeting in such an historic location. He said the meeting had been interesting and educational for him and, he was sure, for all delegates.

The CHAIR, on behalf of the organizing committee for the 55th Plenary Meeting, expressed his gratitude for the work which had been ac-

complished over the past week: The Meeting was a success because it was well organized and informative. He said Uzbeks would treasure the memory of these days for a long time in the future, as the Meeting was of great importance to the Republic of Uzbekistan. His government had made information about the Meeting widely available throughout the country and the CIS, he said, through television and the press.

The CHAIR added that there is an Uzbek saying that in order to meet again we must say goodbye. Thus, he said, goodbye until the 56th Meeting in Paraguay. He said he hoped that the resolutions and statement of the Meeting would be implemented. He said that Uzbekistan had recognized since 1992 that the ICAC is an international organization which is capable of solving global and important issues of the world cotton industry. On behalf of the government and President of Uzbekistan he expressed appreciation for the work of delegates.

With these words, the CHAIR asked delegates to applaud themselves as a signal that the 55th Plenary Meeting had come to a close.

Steering Committee

First Meeting

Monday, October 7, 1996, 11:30 am

The SECRETARY GENERAL welcomed delegates to the 55th Plenary Meeting on behalf of the Secretariat of the Committee. He then introduced the officers of the 55th Plenary Meeting, which under the Rules and Regulations of the Committee, had been designated by the host government.

The SECRETARY GENERAL introduced H.E. Mr. Utkur Sultanov, Prime Minister of the Republic of Uzbekistan, who had been designated to serve as Chairman of the Meeting. The SECRETARY GENERAL noted that Mr. Elijor Ganiev, First Deputy Minister of Foreign Economic Relations and Mr. Abdulkhamit Adylov, Deputy Minister of Foreign Economic Relations would be serving with him as Vice Chairmen.

Mr. Utkur Sultanov in the Chair

The CHAIR welcomed delegates to Tashkent and said the Government of Uzbekistan had had a sincere desire for some time to have the ICAC Plenary Meeting in Tashkent. He said he was glad at last to extend greetings to all the countries represented. The CHAIR said the purpose of the

first meeting of the Steering Committee was to approve the proposed Agenda for the Meeting, which had been distributed. He asked delegates for their comments. The delegate of the USA proposed extending the time for the second meeting of the Steering Committee until 5 pm on Wednesday, due to the list of matters to be discussed. The CHAIR assured the delegate that he would do his utmost to insure that adequate time would be provided for delegates to discuss the business of the Committee. Seeing no other comments, he declared the Agenda approved as presented.

The CHAIR informed delegates that Mali had completed the necessary requirements for accession to membership in the Committee. He asked delegates to confirm this accession and Mali's initial assessment of \$21,500. There were no comments and the Chair confirmed Mali's accession and welcomed the delegates of Mali to the Meeting, sharing with delegates his memory of Uzbekistan's accession to the Committee and what it has meant to the integration of the country's cotton industry in the world cotton economy. The confirmation of Mali's accession was greeted by other delegations with applause.

The CHAIR asked delegates if they had other comments.

The delegate of CHINA (TAIWAN) said that he was distressed to find that China (Taiwan), as his government was known in the ICAC, was seated at the table under the name Chinese Taipei. He noted that the ICAC was a technical organization involving economic affairs in cotton where there was no room for political discussions which would endanger the rights of existing members. He requested that his government be allowed to sit at the table under its name in the Committee.

The CHAIR said the Government of Uzbekistan, which is a member of the United Nations, had followed the precedent of the Olympic Games, in which the delegate's government was represented under the name Chinese Taipei. The CHAIR asked the Secretary General for his consultation regarding these procedures. The SECRETARY GENERAL noted that China (Taiwan) had first joined the Committee in 1946 and had been known by the name China (Taiwan) for over 30 years. He said that at all times since he had been Executive Director of the Committee, the delegation had been seated at Plenary Meetings under the name China (Taiwan). The CHAIR recognized the precedent and said the designation would be

changed at the beginning of the First Plenary Session.

The delegate of ARGENTINA expressed his country's pleasure with its connection to the International Cotton Advisory Committee. He said the Committee should do its utmost to accept a maximum number of members, both producers and consumers. A large number of members would not only assist with financial support of the Committee's work but increase its involvement as well. He applauded the accession of Mali and urged other delegations to use all necessary means to attract additional members.

The CHAIR associated himself with the Argentine delegate's position. He said including evermore producers, ginners, traders and manufacturers in the Committee's membership was fully within the spirit of the organization. There being no other items to consider at the time, he adjourned the First Meeting of the Steering Committee and noted that the Second Meeting of the Steering Committee was scheduled for 2:00 pm on Wednesday, October 9.

Second Meeting

Wednesday, October 9, 1996, 2:00 pm
Mr. Utkur Sultanov in the Chair

The CHAIR asked the Secretary General to present Working Paper II, a report from the Executive Director on the Work Program of the Secretariat. This report is published as a Statement of the Meeting. The SECRETARY GENERAL described the work of the Secretariat during 1995/96 and plans for 1996/97 in the fields of economics and statistics, technical information and staff support to the Standing Committee and the Plenary Meeting. The Secretary General also reviewed the financial condition of the Committee.

The delegate of ZIMBABWE stated that member countries can benefit from each other's experience in the provision of inputs and crop financing in order to improve yield and quality. It is therefore recommended, he said, that the Secretariat compile information on this aspect covering all member countries for circulation at the 56th Plenary Meeting.

The CHAIR asked delegates for comments. The CHAIR observed that the Steering Committee was in full accord with the work program of the Secretariat described in Working Paper II.

The CHAIR recognized Mr. Victoriano Leviste, delegate of the Philippines and Vice Chair of the Standing Committee to present Working Paper III, a Recommendation of the Standing Committee regarding the election of officers. This report is published as a Statement of the Meeting. Mr. Leviste noted that the Chair of the Standing Committee, Mr. Molina of Argentina, had been

unable to attend the Plenary Meeting and that he was speaking in Mr. Molina's place. Mr. Leviste reported that the Nominating Committee met on May 9, 1996 and recommended to the Standing Committee that Mr. Victoriano Leviste, delegate of the Philippines, be nominated as Chair of the Standing Committee for the coming year; that Mr. Aluisio Lima-Campos, delegate of Brazil, be nominated as First Vice Chair; and that Mr. Alaa Eldin Shalaby, delegate of the A.R. of Egypt, be nominated as Second Vice Chair. Mr. Leviste reported that at its 417th Meeting, the Standing Committee accepted the recommendation of the Nominating Committee.

The CHAIR thanked Mr. Leviste for his report and requested the comments of delegates on the recommendation contained in Working Paper III.

The delegate of ARGENTINA expressed gratitude to the officers of the Standing Committee and noted that the tasks facing the Standing Committee are important. The Standing Committee fulfills resolutions adopted at Plenary Meetings and conducts the work of the Committee between Plenary Meetings. The delegate expressed concern that since 1993 there had been an extraordinary amount of time in the Standing Committee spent reviewing administrative matters. According to the delegate's review of minutes of Standing Committee meetings, about 40% of all working time of the Standing Committee was spent on administrative matters in 1993, the proportion spent on administrative matters rose to 69% in 1994 and to 88% in 1995. In 1996, the Standing Committee seemed to be almost exclusively focused on administrative issues. The delegate declared that the amount of time spent by the Standing Committee on administrative issues must be drastically reduced in the future and noted that important issues, including matters related to trade in cotton and textiles, protection of the environment and ways to improve cotton's share of the fiber market deserved the Standing Committee's attention.

The CHAIR thanked the delegate for his remarks and expressed the hope that a majority of delegates shared a concern about the need to reduce time spent on administrative issues in Standing Committee Meetings. The CHAIR congratulated Mr. Leviste on his election as Chair of the Standing Committee, Mr. Lima-Campos on his election as First Vice Chair and Mr. Shalaby on his election as Second Vice Chair.

The CHAIR asked Mr. Leviste to present Working Paper IV, a matter referred by the Standing Committee to the Plenary Meeting regarding Private Sector Participation in ICAC Affairs. This report is published as a Statement of the Meeting. Mr. Leviste presented Working Paper IV, noting that a proposal had been made by the Executive Director at the 54th Plenary Meeting

to develop ways for greater participation of private organizations in the ICAC. The Standing Committee discussed at its 414th and 415th Meetings the suggestion that a category of membership in the ICAC be created for private sector participants. Concerns were expressed by delegates that such a category of membership would change the nature of the ICAC, but there was support expressed for increased private sector participation under a set of precise rules. The Standing Committee recommended that there be no change in arrangements for private sector participation in ICAC affairs.

The CHAIR thanked Mr. Leviste for his report on Working Paper IV and asked delegates for their comments.

The delegate of the USA stated that the USA sees the value of attracting greater private sector resources to the Committee, but is sympathetic with the concerns of many members that the intergovernmental character of the Committee should not be changed through increased private sector participation, and that such participation should result in a net gain in resources accruing to the Committee. Provisions for participation would have to be carefully delineated. The USA supported the recommendation of the Standing Committee contained in Working Paper IV.

The delegate of SOUTH AFRICA expressed sympathy with the concerns of the USA delegate but added that he felt the introduction of some kind of commercial thinking into ICAC deliberations would be helpful and could be accomplished without changing the nature of the Committee. He suggested that a small group composed of delegates and representatives of the private sector with an interest in cotton be formed to further discuss membership possibilities.

The delegate of the UNITED KINGDOM thanked the Government of Uzbekistan for hosting the Plenary Meeting. The delegate noted that the private sector was increasingly important in the cotton industry and that the ICAC needed to be cognizant of these changes. He suggested that the recommendation of South Africa regarding the formation of a small group to discuss increased private sector participation in the affairs of the ICAC be adopted.

The CHAIR stated that the concerns of delegates wishing for additional discussion of private sector participation in the Committee needed to be addressed. The CHAIR thanked delegates for their views. The CHAIR noted that there didn't seem to be a difference of opinion. He found a consensus both for the current proposal of the Standing Committee and the formation of a working group. He thanked all delegations for their warm words of thanks directed toward the government of

Uzbekistan for hosting this Meeting and noted that the 55th Plenary Meeting was an extraordinary event in the life of the Republic of Uzbekistan.

The CHAIR again recognized Mr. Leviste and asked if he would present Working Paper V, a recommendation of the Standing Committee regarding the Classification of Secretariat Positions on the UN Scale. This report is published as a Statement of the Meeting.

Mr. Leviste presented Working Paper V. He reminded delegates that the Steering Committee at the 54th Plenary Meeting had determined that staff positions at the Secretariat should be set at UN grades for positions of commensurate responsibility. He reported that following the 54th Plenary Meeting the Executive Director, in consultation with the office of human resources management of the United Nations, had presented UN grades for Secretariat positions to the Standing Committee at the 417th Meeting.

Mr. Leviste reported that at the 419th Meeting of the Standing Committee a proposal was adopted which recommended to the Advisory Committee that certain UN grades and steps be assigned to Secretariat positions, and that Committee contributions to the Staff Retirement Plan should be frozen at 1995/96 levels. He said that, while the Chair of the Standing Committee found a consensus for adopting the above measures, some delegations expressed reservations. Details of the recommendation of the Standing Committee are found in the minutes of the 419th Meeting of the Standing Committee.

The CHAIR thanked Mr. Leviste for his report and asked if he had also reported on Working Paper VIII, a report from the Executive Director regarding operations under the Rules and Regulations of the Committee.

Mr. Leviste verified that his report had been limited only to the material in Working Paper V.

The CHAIR noted that Working Paper VIII dealt with issues related to Working Paper V and asked the Secretary General to report on the contents of Working Paper VIII. This report is published as a Statement of the Meeting.

The SECRETARY GENERAL reviewed Working Paper VIII. He discussed the relationship between the Advisory Committee and the Standing Committee, taking note of their respective responsibilities and the subordinate nature of the Standing Committee to the Advisory Committee. He provided background to the current discussions regarding the application of UN grades to Secretariat positions. He reviewed previous Committee decisions regarding the Standing Committee's role in the management of the Secretariat and the Executive Director's salary. He reported that the Executive Director was fully prepared to implement the decision of the 54th Plenary Meeting with regard to subordinate staff

salaries but that the application of appropriate UN grades would have significantly increased the salaries paid to some staff. He reviewed his reasoning in granting a cost of living increase to the Secretariat as of July 1, 1996 and why the increase was applied to the Executive Director's salary. The SECRETARY GENERAL reported on the implications of accepting the Standing Committee's recommendation contained in Working Paper V, including the observation that 95% of Standing Committee time would be spent on administrative matters. Finally, the SECRETARY GENERAL reported alternatives for the Advisory Committee to consider: The Advisory Committee could accept appropriate UN grades for Secretariat positions but phase in the resulting salary changes over a number of years, or the Advisory Committee could reverse the decision taken at the 54th Plenary Meeting and return the responsibility for management of the Secretariat to the Executive Director.

The CHAIR thanked the Secretary General for his report and asked delegates for their comments.

The delegate of EGYPT reported that there was no consensus for the proposal from the Standing Committee contained in Working Paper V as some countries had rejected the proposal. He said Egypt objected to the proposal because the classification of Secretariat positions should be based on the objective criteria from the UN used by the Executive Director rather than current salary levels as proposed by the Standing Committee. He noted that the Standing Committee had exceeded its authority in proposing step levels for Secretariat positions, as well as grade classifications. The delegate of Egypt said the success of ICAC depended on understanding between the Committee and the Secretariat. The Committee should insure the psychological stability of the Secretariat by taking into consideration the concerns of the Secretariat and by providing them incentives for work. He noted that the work of the ICAC is vital to a large number of countries, particularly developing countries, and that it was important that the work of the Secretariat not be disrupted.

The CHAIR noted that, as 85% of the time of the Standing Committee was devoted to administrative details, a courageous effort from delegates to the Plenary Meeting was required to increase the time spent on cotton matters.

The delegate of the USA reviewed the background of the recommendations in Working Paper V. His remarks are published as a Statement of the Meeting.

The delegate of COTE D'IVOIRE noted that the subject of staff salaries was a delicate issue that needed to be discussed in the context of changes occurring at the World Bank, the IMF and at other organizations and in light of the USA decision to withdraw from the Committee. How-

ever, the ICAC must find the funds to compensate qualified personnel. He suggested that an outside auditor review ICAC salaries, and that comparisons with salaries paid to staff in other international organizations be studied.

The delegate of the UK said his government's objective was simple: A Secretariat of the ICAC which operates effectively; discussions at meetings concentrating on cotton matters; retaining tight control on total spending; and a staff treated equitably with regard to comparable positions in other organizations, not only in salaries but status as well. He said his government was not enthusiastic about the proposal to convert the Secretariat to the UN system of grades because there was no evidence that staff were overpaid at present, and the UK did not wish to relinquish control over a large proportion of the Secretariat budget by tying remuneration to decisions made by the UN. The delegate noted that the UN grades recommended by the Executive Director which it appears were never even discussed by the Standing Committee, had been based on objective criteria but that the recommendations included in Working Paper V seemed linked only to current salary levels. The delegate also found it unsatisfactory not to adopt UN pension arrangements if salaries are to be based on UN grades. The delegate indicated that he did not see that movement to a UN system would have any advantages over the system which had been used at ICAC since 1987 in which the Standing Committee set a budget total and insisted that the Executive Director operate within that constraint. He said he did not know of any problem of the organization staying within its budget. The delegate recommended that the recommendations contained in Working Paper V be rejected and that they rescind the decision taken at the 54th Plenary Meeting to place subordinate Secretariat positions on the UN scale. The delegate proposed further that a vote be taken by secret ballot.

The CHAIR said the ICAC is supported by member contributions, with the idea of attaining the objectives of the organization. He noted that Uzbekistan paid \$113,000 and the USA \$130,000. He said the salary system that has been in place, with authority given the Executive Director, was fair.

The delegate of SUDAN thanked the Executive Director for the work of the Secretariat during the past year, which Sudan considers of high importance. He said that it was important that the Executive Director and the Standing Committee reach an understanding, without which it will be difficult to attain our objectives. The delegate was concerned that the Secretariat be treated fairly, considering the work load of the Committee. He hoped that the Standing Committee would spend less time on administrative matters. He supported the proposal of the dele-

gate of the UK to allow the Executive Director the authority to discharge his tasks within the limits of a budget approved by the Standing Committee, and he supported the proposal to vote by secret ballot. The Executive Director should be given full authority to discharge his responsibilities, he said.

The CHAIR asked for other delegates views on the proposal to cast secret ballots.

The delegate of PAKISTAN asked the Chair to clarify the financial implications of the UK proposal.

The CHAIR responded that the UK proposal to reject the recommendations in Working Paper V would not increase or decrease the budget of the Committee.

The delegate of BRAZIL reported that every delegate should be informed of the contents of the report issued by an informal group of delegates to the Standing Committee who had met in Washington in August. The delegate noted that the recommendations of the informal group had become the recommendations of the Standing Committee, that the report of the informal group was fair and that the recommendations contained in Working Paper V would have no budget impact. The delegate expressed frustration over the delay in the distribution of documents from the Secretariat and noted that similar delays over the past three years explained why so much time had been spent in the Standing Committee dealing with administrative matters. He noted that he also was getting tired of dealing with administrative matters.

The delegate of CHAD said that all speakers had emphasized their satisfaction with the work of the Secretariat and that meant that the Standing Committee should not be interfering with the work of the Executive Director. The delegate supported the suggestion made by the delegate of the UK.

The CHAIR asked if there were a consensus regarding voting.

The delegate of ARGENTINA asked for clarification regarding the subject of the vote.

The CHAIR summarized the options before the Steering Committee.

The delegate of the PHILIPPINES was recognized to express his view on voting. He commented on worldwide budget cutting and downsizing as the reason for the Standing Committee's concern about finances. He supported the Standing Committee's recommendation. His remarks are published as a Statement of the Meeting.

The CHAIR again asked the delegate of the Philippines to express his view on voting. The delegate of the PHILIPPINES reported that he had already voted in the Standing Committee in

Washington and that he supported the recommendations in Working Paper V.

The delegate of SOUTH AFRICA thanked the Standing Committee for its work during the past year. The delegate noted that he had opposed the decision taken at the 54th Plenary Meeting to move to a system of UN grades. He recalled that the Advisory Committee had received several reports over the last three years from consultants and auditors regarding Secretariat salaries, but that the recommendations contained in those reports had been to raise Secretariat salaries and so had been disregarded. He noted that the Standing Committee seemed to be trying to mini-manage the Secretariat and that no business is successful when managed by a committee. He suggested that delegates return control over management of the Secretariat to the Executive Director by supporting the recommendation made by the delegate of the UK.

The delegate of the USA said he believed Working Paper V and Working Paper VIII should have been considered separately; he rejected the assertion that the Standing Committee was trying to micro-manage the Secretariat. He supplied a statement on Working Paper VIII which he said touches on the issue of micro-management and asked that it be included in the proceedings (this statement is published as a Statement of the Meeting). The delegate noted that the proposal to cast a secret ballot would set a precedent and asked why such a ballot was necessary. He repeated his support for the proposal from the Standing Committee contained in Working Paper V and said the USA could not support the recommendation of the Executive Director. He said that the USA would not agree to a secret vote in an international organization and suggested that the Steering Committee go into executive session to discuss the issues openly.

The CHAIR noted that it was obvious that a fair application of objective UN criteria to Secretariat positions would result in an increase in salaries, and countries did not want the budget of the Committee to increase substantially. However, it was unfair to pick up a pair of scissors and begin carving up the process. It was clear now that delegates to the 54th Plenary Meeting did not realize the budget implications of their decision to tie Secretariat positions to UN grades. The CHAIR asked if delegates were prepared to vote on the Standing Committee recommendation.

The delegate of AUSTRALIA questioned the need for a secret ballot. The delegate affirmed that Australia is in agreement with the USA and supports the recommendations of the Standing Committee contained in Working Paper V.

The CHAIR reviewed the Rules and Regulations with the Secretary General and determined that Article 11 provided for issues to be decided by

secret ballot should there not be a consensus and any delegate requests such voting.

The delegate of TANZANIA noted that the option of accepting the Executive Director's classification of staff positions was not feasible because of the impact on the Committee's budget. Therefore, he said, the Steering Committee was really faced with just two options: The Steering Committee could accept the recommendations contained in Working Paper V; or it could accept the UK suggestion to return control over staff salaries to the Executive Director.

The CHAIR determined that delegates were prepared to vote by secret ballot. He authorized a 20-minute break to allow time for the preparation of ballots.

Mr. Abdulkhait Adylov in the Chair

The CHAIR asked the Secretary General to read the draft ballot.

The SECRETARY GENERAL said that there would be two questions on the ballot and delegates would vote for one:

1) Accept the recommendations of the Standing Committee contained in Working Paper V.

2) Reject the recommendations of the Standing Committee contained in Working Paper V, and adopt instead the proposal of the delegate of the UK to rescind the decision taken at the 54th Plenary Meeting, vesting authority for administrative matters in the hands of the Executive Director.

The CHAIR asked delegates for their comments.

The delegate of the USA wanted to verify that the proposal of the delegate of the UK was to reject the Standing Committee recommendations contained in Working Paper V, to rescind the decision to convert Secretariat positions to the UN scale.

The delegate of the UK confirmed that was his proposal.

The delegate of FRANCE noted that the Standing Committee has extensively discussed the administrative problems this year. The information was transmitted in documents 417-419 and memorandum 597. He said France supports the final proposal of the Standing Committee, i.e. the UN classification.

The CHAIR asked the delegate of the UK to restate his suggestion.

The delegate of the UK stated again that the Secretariat does not appear to be overpaid, nor does the budget of the Committee seem to be too large, nor is there any dissatisfaction with the work of the Secretariat since 1987. His

suggestion was that the Committee should provide the Secretariat with a budget and charge the Executive Director with the responsibility of managing the staff within those resources. If the work of the Secretariat is not satisfactory, it is his responsibility to make adjustments. The Standing Committee exercises control once a year through the approval of a budget, and the Advisory Committee exercises ultimate control through its employment of the Executive Director. The delegate asserted that it is not appropriate for the Standing Committee to be engaged in the setting of salaries and grades. His proposal, therefore, was to reject the recommendations contained in Working Paper V and rescind the decision taken at the 54th Plenary Meeting to tie Secretariat salaries to UN grades.

The delegate of GERMANY questioned the wording of the draft ballot and suggested that the Steering Committee first vote yes or no on whether or not to accept the recommendations from the Standing Committee contained in Working Paper V.

The CHAIR agreed that it would be appropriate to decide first whether the delegates support or reject the proposals in Working Paper V.

The delegate of the USA noted that Working Paper V contained numerous recommendations in addition to those dealing specifically with the UN grades for staff positions. The delegate asked if the proposals in Working Paper V could be considered separately.

The CHAIR responded that the proposal of the delegate of Germany was to vote yes or no on the recommendations in Working Paper V.

The delegate of SOUTH AFRICA asked to verify that the vote to be taken was yes or no regarding Working Paper V.

The delegate of UGANDA said that he did not have all the documents available to other delegates before coming to the Plenary Meeting. He asked if the Chair could summarize the financial implications of the two proposals.

The CHAIR responded that both the recommendations of the Standing Committee contained in Working Paper V and the recommendation of the delegate of the UK would have no impact on the budget.

The CHAIR asked the Secretary General to read the ballot as amended following the suggestion of the delegate of Germany.

The SECRETARY GENERAL read the amended ballot:

- 1) Accept the recommendations of the Standing Committee contained in Working Paper V.
- 2) Reject the recommendations of the Standing Committee contained in Working Paper V.

The delegate of INDIA asked the Secretary General for a clarification of the impacts on the budget of the various options.

The SECRETARY GENERAL responded that the proposals in Working Paper V and the proposal of the delegate of the UK would have no impact on the Committee's budget. A third proposal to accept the UN classifications suggested by the Executive Director would increase the budget by 12%.

The delegate of SOUTH AFRICA verified that the upcoming vote was yes or no on Working Paper V.

The CHAIR verified that a vote to accept Working Paper V would decide the issue, but that a vote to reject Working Paper V would necessitate a second decision regarding the UK suggestion.

Ballots were distributed to delegates and collected. The ballots were counted by the CHAIR and his assistant.

The CHAIR reported that 34 ballots had been cast. Two ballots were abstentions; twelve ballots were marked to accept Working Paper V; twenty ballots were marked to reject Working Paper V. The CHAIR therefore concluded that the recommendations in Working Paper V were rejected.

The CHAIR asked if there was a consensus among delegates to accept the suggestion of the UK delegate.

The delegate of ARGENTINA urged delegates to use caution before deciding this issue. He reminded delegates of the inordinate amount of time spent in the Standing Committee discussing administrative matters.

The delegate of the USA asked for a vote on the proposal by the delegate of the UK.

The delegate of FRANCE stated that analysis of the function determines the classification, and that the classification then determines the level of compensation based on the United Nations salary scale, rather than the other way around. Even so, he said, this process cannot result in a budget increase. He said, if the classification is incorrect, then it must be changed.

The CHAIR noted that delegates had sufficient information to decide whether the UK proposal was acceptable.

The delegate of the PHILIPPINES reminded the Committee that due to the delayed distribution of the minutes of the 419th Meeting of the Standing Committee and the way Working Paper V was formatted, delegates may be confused and misled on the issues presented. He reiterated that Working Paper V contained several recommendations from the Standing Committee, including a recommendation that retirement contributions

be frozen and that the 5.2% salary adjustment be reduced to 2.5% and other recommendations.

The CHAIR responded that the Steering Committee had already voted to reject Working Paper V in its entirety. The CHAIR asked if there were a consensus regarding the UK proposal. He asked if anyone opposed the UK proposal.

The delegate of the USA asked the CHAIR to verify that he was asking for a consensus of delegates on the UK proposal to revert to the staff management system in place from 1987, thereby overturning the decision taken at the 54th Plenary.

The CHAIR responded that yes, he was asking for consensus on the UK proposal.

The delegate of BRAZIL pointed out that if the Steering Committee were voting to go back to the 1987 system, then it was also voting to cancel the increases granted by the Executive Director in July 1996, which were based on the UN system.

The CHAIR responded that the 1987 system granted the Executive Director authority to manage staff salaries within the constraints imposed by the budget. It followed that the Executive Director would use his own discretion in deciding whether to retain the 5.2% increases granted this year.

The delegate of PAKISTAN assured delegates that Pakistan could not support any change that would result in an increase in the budget of the Committee.

The CHAIR assured delegates that the UK proposal contained no implications for the budget of the Committee.

The delegate of SOUTH AFRICA reiterated his support for a management system in which the Executive Director manages the Secretariat within the resources provided by the member countries.

The CHAIR reported that there was a consensus to accept the proposal of the delegate of the UK.

The delegate of the USA said that if the Committee reverts to the system in place, the Standing Committee had approved a 2.5% increase for salaries in the current budget and the 54th Plenary Meeting had approved a salary for the Executive Director equal to the UN grade D-1. The delegate felt that acceptance of the UK suggestion would imply that the Executive Director should refund the 5.2% cost of living adjustment.

The CHAIR responded that the Executive Director is free to allocate salaries within the constraints imposed by the budget of the Com-

mittee. He reiterated his view that there was a consensus to accept the suggestion of the delegate of the UK and declared the matter settled.

The CHAIR asked Mr. Leviste to read Working Paper VII, a recommendation of the Standing Committee regarding an Amendment of the Rules and Regulations to delete the "equal treatment" section of Article VII. This report is published as a Statement of the Meeting.

Mr. Leviste reported from Working Paper VII that the Standing Committee wished to delete a paragraph from the Rules and Regulations of the Committee requiring that the Executive Director receive equal treatment with other members of the Secretariat in all matters, including the determination and implementation of cost of living adjustments to salaries, in order to deny the Executive Director any salary adjustment because the 54th Plenary Meeting had voted to freeze the Executive Director's salary until parity with UN grade D-1 had been reached.

The delegate of the USA expressed support for the recommendation contained in Working Paper VII.

The delegate of the UK suggested that the clause be kept, with the word "including" in Article VII, Section 1, paragraph b, changed to "excluding."

The delegate of the USA suggested the word "except" in place of "excluding."

The delegate of EGYPT supported the suggestion of the delegate of the USA.

The delegate of the PHILIPPINES noted that the Standing Committee recommendation contained in Working Paper VII called for elimination of paragraph b entirely.

The delegate of SOUTH AFRICA suggested that paragraph b, as amended by the delegate of the USA, be retained in the Rules and Regulations.

The CHAIR asked if there were a consensus regarding the proposal of the delegate of South Africa to accept the USA suggestion.

The delegate of the USA asked that the phrase "and contributions to retirement benefits which will be determined in the case of the Executive Director according to the UN system" be added to the end of paragraph b before the period after the word "salaries" in the current language.

The delegate of PAKISTAN said that he thought the Steering Committee had voted not to accept the UN system and asked why the Executive Director would be under the system.

The delegate of CAMEROON pointed out that the suggestion of the delegate of the USA to replace the word "including" with "excluding" in paragraph b could be inconsistent with word-

ing in other portions of the Rules and Regulations.

Given the lateness of the hour, the CHAIR suggested that resolution of this issue and the other item on the Agenda of the Second Meeting of the Steering Meeting, Relocation of the Secretariat, be postponed until the Third Meeting of the Steering Committee.

The CHAIR adjourned the Second Meeting of the Steering Committee, at 6:55 pm.

Third Meeting

Friday, October 11, 1996, 9:00 am
Mr. Utkur Sultanov in the Chair

The CHAIR welcomed delegates to the third meeting of the Steering Committee and asked Mr. Abdulhamit Adylov, who had served as Chair of the Committee on Cotton Production Research, to make a brief report of the Committee's meeting on Thursday.

Mr. Adylov said the meeting of the Committee on Cotton Production Research and technical seminar on October 10 had met from 8:30 am until 2 pm and had heard seven interesting papers. In addition, reports on Common Fund projects, originally scheduled for the Fifth Plenary Session on October 9, were heard, as well as notices regarding future meetings. He asked Dr. Chaudhry of the Secretariat to present a detailed report.

Dr. Chaudhry presented the detailed report of the Chair of the Committee on Cotton Production Research, which is attached. The CHAIR asked delegates for their views on the report; seeing no objections, he declared the report approved as presented.

The CHAIR next called on Mr. David Burnikell of the United Kingdom who had served as Chair of the Drafting Group to present the text of the statement drafted by delegates in a meeting which extended from 4:30 pm to 7:30 pm on Thursday.

Mr. Burnikell read the statement drafted by the Drafting Group.

The delegate of ARGENTINA proposed two corrections to the text of the statement as read by Mr. Burnikell, elimination of the words "were urged to" in point 9 and replacing "average cotton prices are" with "the average Cotlook A Index is" in point 2. The CHAIR found agreement for these changes, and the statement developed by the drafting group as corrected was adopted as the Statement of the 55th Plenary Meeting.

The CHAIR asked the Secretary General to report on the time and place of the next Meeting. The SECRETARY GENERAL noted that he

had received a formal invitation from the Minister of Agriculture of Paraguay, Mr. Juan Alfonso Borgognon, to hold the 56th Plenary Meeting in Asuncion the last week of October 1997. The CHAIR noted that the Committee had earlier accepted the invitation of Bolivia to hold the 57th Meeting in 1998 and the 58th Meeting in Sudan in 1999.

Following these matters, the CHAIR turned to the two remaining items on the Steering Committee's Agenda, items left over from the Second Meeting. On the first matter, he asked the Secretary General to report on the status of discussions.

The SECRETARY GENERAL said that delegates were considering language proposed by the USA and supported by other countries to retain point b, Section 1, Article VII in the Rules, but to modify the language. The modified language was before delegates.

The delegate of the USA corrected the language to conform with his suggestion.

The delegate of the UNITED KINGDOM supported either the Secretariat's version of the US proposal or the language as corrected by the US delegate. He proposed an additional amendment further down to point c.,3 (c). As a result of discussion in the Second Meeting of the Steering Committee, he proposed replacing the existing point (c) with three paragraphs, (c), (d) and (e), which further specified the responsibilities of the Executive Director with regard to the budget.

The delegate of ARGENTINA said that it is very important to consider such matters thoroughly to avoid making decisions such as those made by the 54th Plenary Meeting.

The delegate of INDIA said the proposed additional amendment by the United Kingdom was sensible, as it specified the procedure by which the Standing Committee would oversee the finances of the ICAC.

The CHAIR declared a fifteen-minute break for the Secretariat to prepare a written copy of the proposed amendment to the Rules as it now stood.

Following the break, the CHAIR asked the delegate of the United Kingdom if the Secretariat had captured his words. The delegate of the UNITED KINGDOM confirmed that it had done so. The delegate of AUSTRALIA suggested adding additional words to point 3 (c) as proposed by the United Kingdom. These words were "providing an indication of the staff resources to be devoted to administrative, technical and other activities." The delegate of the UNITED KINGDOM, on further thought, proposed replacing the word "under" in the same point with "to include."

The CHAIR found agreement for the language as modified by the USA, the United Kingdom and Australia and declared Article VII of the Rules and Regulations so amended. The amended Section I of Article VII is attached.

The CHAIR called on the Secretary General to present Working Paper VI on the matter of the Relocation of the Secretariat. Working Paper VI is published as a Statement of the Meeting. The SECRETARY GENERAL summarized the background of the decision of the Standing Committee to keep the headquarters of the ICAC in the USA for the time being and to seek clarification of the interest of countries offering to host the Secretariat now that the USA has decided to remain a member of ICAC. The CHAIR asked delegates for their views. The delegate of CAMEROON asked if the intention of the USA to be a member of the ICAC is permanent or temporary.

The delegate of the USA said there was an expression in his country that nothing was certain except death and taxes. He said the USA remains a member of ICAC because of an act of law. He noted that his government had paid its arrears for 1995/96 and he hoped that payment of obligations for 1996/97 would be paid as soon as possible. Given the stress on the US government budget, he could not assure delegates that the USA would remain a member forever, as the decision would depend on the budget process.

The delegate of PAKISTAN brought to delegates' attention Pakistan's intention to host the ICAC. Pakistan, he said, was in the process of making this invitation as the USA decided to remain a member. He welcomed the USA back to the Committee as a valuable member.

The delegate of TURKEY concurred that it was glad that the US withdrawal issue had been settled. He said the proposal of Turkey to host the Committee in Izmir was still valid if the Standing Committee or Advisory Committee should decide to move. He offered any information necessary on the proposal, in addition to the plan for office space and video which had been supplied earlier.

Following these comments, the CHAIR adjourned the Third Meeting of the Steering Committee at 11 am.

ATTACHMENTS

Report of the Chairman of the Committee on Cotton Production Research

Abdulkhamit Adylov

Seven papers were presented on various aspects of short season cottons which included utilization of germplasm resources, impact of short

season on insect pests control, physiological implications, comparative cost of production and problems faced in breeding for short duration cottons.

Dr. Mursal of Sudan presented a paper on germplasm utilization in breeding short duration cotton. He said that *Gossypium* germplasm has been extensively and successfully utilized in breeding to accomplish a number of objectives and still there is an immense potential to use it in the future. He said there are three ways to insert genes into cultivated *hirsutum* types: transfer from *hirsutum* races, which is easier; transfer from *G. barbadense*; and transfer from diploid species. In case there is at least homology in chromosomes, chromosome doubling in triploids to make hexaploids and synthetic allopolyploidy is used to overcome difficulties. He said that while developing short duration varieties in Sudan, emphasis has been on reducing the time taken from planting to square formation and from boll formation to opening. Dr. Mursal also referred to the performance of some introductions in Sudan and linked the short duration varietal characteristic to saving inputs like irrigation water, insecticide applications and fertilizers. On a question raised by a participant from India, Dr. Mursal stated that *G. barbadense* escapes from stickiness because by the time the bolls open, the whitefly population is reduced to very low levels.

Dr. M. S. Kairon from the Central Institute for Cotton Research, India, emphasized the significance of availability of suitable germplasm for developing short duration varieties. His paper concentrated more on morphological characters which affect plant behavior. According to him, reduction in monopodia length, profuse flowering, high early boll setting, short internode length and closer to the main stem bearing are some of the important criteria used to develop short duration varieties. In India, short duration varieties have allowed enhanced cropping intensity and extended cotton cultivation to new areas. He said that the crop duration period has been reduced by 80-95 days in *hirsutum*, 25-50 days in arboreum, 55-60 days in herbaceum, 45 days in *barbadense* and by 50-55 days in commercial cotton hybrids. Dr. Kairon stated that fiber quality is affected more by the duration of the boll maturing period compared with any other period of crop development. He concluded that, based on the availability of suitable germplasm, the growing period in India can be reduced from over 145 days to 125 days in upland cotton.

Dr. Ibrahim Egamberdiev of the Institute of Cotton Breeding and Seed Production, Tashkent, listed the research priorities for the development of short duration varieties in Uzbekistan. The other additional criteria of selection are resistance to bacterial blight, verticillium wilt and suitability for machine picking.

However, requirements of the industry are never forgotten. The genetic engineering approach is also utilized for the development of short duration varieties. Dr. Egamberdiev disclosed that some of the latest genotypes have a lint percentage of 41-42%. *G. thurberi* has been utilized to improve fineness, length and tolerance to sucking insects in *G. hirsutum* varieties. He also mentioned the successful plant protection technology developed by the Plant Protection Institute.

A paper on limitations to breeding for short-season cottons was presented by Dr. Serunjogi of Uganda. The four major problems, he listed, are effect of genetic x environment interaction, limitation of breeding tools and resources, frequent variations in growing conditions and resource management. In order to develop short-season cottons, the breeders have to modify natural germplasm resources into readily usable forms. Dr. Serunjogi suggested studying genetic modes and magnitudes of heritability to minimize environmental effect on expression of earliness and also to develop regional and international germplasm exchange and a breeding tools network for effective utilization of scientific information. Dr. Serunjogi did not agree with views expressed by the delegate of Pakistan that early maturity would push the bulk of fruit formation and opening into the high insect population period.

Dr. Malik from Pakistan stated that there are two types of cotton growing systems, i.e. the long full season production system which utilizes the primary and secondary fruiting cycles and a short season system which utilizes only the primary fruiting cycle. He compared both systems with respect to morphological and behavior differences. In case of the short duration system, solar radiation is intercepted at a higher rate and the rate of conversion of energy photosynthesis to usable products is also higher. However, short duration cottons are not suitable for subsistence agriculture as they have little capacity to recuperate from biotic and abiotic stresses. Dr. Malik presented three scenarios where the cotton growing season can be reduced to 105, 110 and 115 days and cotton yield of over 1,200-1,500 kg/ha can still be obtained without affecting fiber quality. He stressed reducing the fruit formation period for developing short duration cottons and emphasized the management of inputs which have a great bearing on maintaining the performance of short duration cottons. Responding to a question from a delegate from Sudan, Dr. Malik explained the relationship between the number of leaves and number of bolls and hoped that one day research will equate the number of bolls with the number of leaves on the cotton plant.

Dr. Russell of the United Kingdom presented his views relating to the impact of short season

cotton systems on the control of insect pests and diseases. According to Dr. Russell, short-season cotton systems provide better insect management but the advantages of short season systems are not necessarily carried over to rainfed and small farmer conditions of low input applications. He stated that the concept of short season systems is a relative term. However, a short season reduces the insect development period and consequently affects the over wintering populations. He discussed the situation insect by insect for major cotton insects in the world and stated that there does not appear to be clear evidence of short duration cotton on control of leaf worm species. Regarding diseases Dr. Russell said that determinate types are exposed to the same biotic constraints as indeterminate. However, he warned that chances of alternaria leaf spot are higher in short duration cottons because of higher possibilities of K deficiencies. In China, due to early harvesting in determinate types, verticillium losses were low in the following years.

The delegate of Paraguay commented that three early maturing varieties, i.e. Reba P288, Bulk 38 and Bulk 41, had been developed in Paraguay in cooperation with CIRAD-CA. But, due to severe dry conditions and lack of farmers' understanding at the time about how to avoid the boll weevil attack with the use of short season varieties, cultivation of Reba P288 was stopped in most of the country. Nevertheless, there are high expectations about the performance of the other two varieties.

Dr. Steenkamp from South Africa presented a different viewpoint compared with other speakers. On the basis of low cost of production in short duration cottons and proportional reduction in total return, Dr. Steenkamp did not recommend developing short duration cottons. In South Africa cotton needs at least 160 degree days and reduction in the growing period by 6, 12 and 18 days showed significant losses in yield. A savings of \$250/ha in inputs which is 7% of the total cost resulted in more than ten times higher loss in actual return. Dr. Steenkamp's recommendations were based on the specific growing conditions of South Africa.

The delegate of Turkey commented that earliness for him means protection from insect pests particularly sucking insects; early maturity; lower cost of production; better lint quality; and early marketing to attract higher early season prices. He also referred to the hybridization process and agronomic operations, particularly fertilizer use, which greatly affect development and performance of short duration types. He said earliness is governed by four genes.

The meeting was informed that the 1997 Technical Seminar will be held on the topic of Common Fund for Commodities funded ICAC projects. The Secretariat presented a status report on

the four projects while a report on the completed project was presented by Dr. Fred Gillham of Australia, who was associated with project as a consultant for the World Bank. These were to be presented in the Fifth Plenary Session which was cancelled due to the time constraints. The reports are published as Statements of the Meeting.

Since the recognition of the ICAC as an International Commodity Body with the CFC, five ICAC projects have been approved. The meeting was informed that one project had been completed and final recommendations were available. Three projects already on the ground and one in the final process of approval are as follows:

- Integrated pest management for cotton
- Integrated pest management of the cotton boll weevil in Argentina, Brazil and Paraguay
- Genome characterization of whitefly transmitted geminiviruses of cotton and development of virus resistant plants through genetic engineering and conventional breeding
- Improve the marketability of cotton produced in the zones affected by stickiness

The total cost of the five projects is US\$18 million out of which US\$8 million have been contributed by the CFC. The meeting was also briefly informed about the budget, objectives and outlines of the work undertaken so far. The project "Improvement of Marketability of Cotton Produced in the Zones Affected by Stickiness" was discussed by the Consultative Committee of the CFC on September 19 and recommended for approval by the Executive Board of the CFC. The Executive Board is meeting in the 3rd week of October and hopefully will approve the project, so as to start work in the current season.

Dr. Gillham summarized the conclusions of the report on the project "Cotton Production Prospects for the Next Decade." More than once in his presentation he referred to the privatization process which according to the delegate from Pakistan may not be a viable proposition due to non availability of infrastructure to take over responsibilities of the public sector. Dr. Gillham referred to the privatization policy of the World Bank and agreed that the ICAC/CFC project did not extensively cover the privatization issue, except in India and Pakistan. However, the privatization process cannot be uniformly applied to all countries. The detailed final report has been published and already provided to all member countries.

The Committee on Cotton Production Research was also informed about progress on the World Cotton Research Conference—2 to be held from September 6-12, 1998 in Greece. The ICAC Secretariat has already contacted the FAO invit-

ing them to join the ICAC and the Hellenic Cotton Board of Greece in sponsoring and organizing the World Cotton Research Conference—2. The Secretariat is planning to make the first formal announcement in the form of a brochure as soon as more details on arrangements become available from Greece.

The Committee on Cotton Production Research was notified of two more conferences. The Technical Information Section of the ICAC is helping the Central Institute for Cotton Research, Nagpur, India, to attract international participation in the two day group discussion on the "Role of Biotechnology Towards Increasing and Sustaining Productivity in Cotton." The group discussion will be held on November 25-26, 1996, following the Crop Science Congress to be hosted by the Indian Agricultural Research Council. The other notice was about the All African Crop Science Congress to be held in South Africa from January 13-17, 1997. The Technical Information Section in collaboration with the African Cotton Research Network (East, Central and South) and the organizers at the Tobacco and Cotton Research Institute of South Africa is working to organize a separate session on cotton during the congress. This opportunity will be utilized to strengthen the African Cotton Research Network which emerged from the informal discussion held during the World Cotton Research Conference—1 in Australia in 1994.

The CHAIR thanked the participants and adjourned the meeting at 2:00 pm.

The full text of papers delivered at the Technical Seminar of the Committee on Cotton Production Research is published separately.

Amendment of the Rules and Regulations

ARTICLE VII - SECRETARIAT

Section 1

The Secretariat shall be headed by an Executive Director who shall be a full time paid employee and shall hold office during the period of his contract of employment.

a. It shall be a condition of his employment that he shall not hold any substantial financial interest that would prejudice the conduct of the affairs of ICAC and that he shall not seek or receive instructions from any authority outside ICAC.

b. The Executive Director shall receive equal treatment with other members of the Secretariat in all matters, except for determination and implementation of cost of living adjustments to

salaries and contributions to retirement benefits which will in the case of the Executive Director be determined by the UN system.

c. The Executive Director

1. Shall be:

(a) Treasurer of ICAC, but without personal financial liability in the normal discharge of such duties;

(b) Secretary General of the Advisory Committee;

(c) Secretary of the Standing Committee and its subordinate bodies, unless he delegates his responsibilities to a member of his staff;

(d) Custodian of all records of ICAC;

(e) In charge of the staff of the Secretariat.

2. Shall have:

(a) Full responsibility for the work program assigned to the Secretariat;

(b) Responsibility for the preparation of agenda; timetables; technical documents; proceedings, notices and minutes of meetings;

(c) Responsibility for matters of protocol and for communication with governments, other international bodies, and with national bodies interested in the work of ICAC.

3. Shall:

(a) Represent the Standing Committee in arrangements with the host governments for meetings of the Advisory Committee;

(b) Assign technical assistance to committees at meetings of the Advisory Committee in consultation with the host governments;

(c) Prepare for the consideration of the Standing Committee an annual detailed management budget to include the following headings: Salaries; pension contributions; travel and subsistence; office equipment; rent and rates, providing an indication of the staff resources to be devoted to administrative, technical and other activities.

(d) Prepare for the consideration of the Standing Committee a proposed scale of assessments.

(e) Provide on a quarterly basis details of expenditure to date against the approved budget.

4. Shall be responsible for such other duties or responsibilities as are assigned to him from time to time by the Advisory Committee or by the Standing Committee.

DOCUMENTS

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| 1. Agenda | 7. WORLD TEXTILE DEMAND - October 1996 |
| 2. ¹ Report of the Chairman of the Standing Committee | 8. WORLD COTTON TRADE - October 1996 |
| 3. ¹ Report of the Executive Director | 9. THE ICAC RECORDER - September 1996 |
| 4. ¹ COTTON: Review of the World Situation - September/October 1996 | 10. Survey of Cotton Production Practices - October 1996 |
| 5. COTTON: WORLD STATISTICS - October 1996 | 11. Growing Organic Cotton - October 1996 |
| 6. THE OUTLOOK FOR COTTON SUPPLY IN 1996/97 | 12. ² Directory |
| | |
| 1. Ordre du jour | 7. LA DEMANDE TEXTILE MONDIALE - Octobre 1996 |
| 2. ¹ Rapport du Président de la Commission permanente | 8. LE COMMERCE MONDIAL DU COTON - Octobre 1996 |
| 3. ¹ Rapport du Directeur exécutif | 9. THE ICAC RECORDER - Septembre 1996 |
| 4. ¹ COTON : Examen de la situation mondiale - Septembre/Octobre 1996 | 10. Etude des pratiques de production cotonnière - Octobre 1996 |
| 5. COTON : STATISTIQUES MONDIALES - Octobre 1996 | 11. Culture du Coton Organique - Octobre 1996 |
| 6. PERSPECTIVES DE L'OFFRE DE COTON EN 1996/97 | 12. ² Répertoire |
| | |
| 1. Agenda | 7. LA DEMANDA MUNDIAL DE TEXTILES - Octubre 1996 |
| 2. ¹ Informe del Presidente del Comité Permanente | 8. EL COMERCIO ALGODONERO MUNDIAL - Octubre 1996 |
| 3. ¹ Informe del Director Ejecutivo | 9. THE ICAC RECORDER - Septiembre 1996 |
| 4. ¹ ALGODON: Revista de la Situación Mundial-Septiembre/Octubre 1996 | 10. Encuesta sobre las Prácticas de Producción Algodonera-Octubre 1996 |
| 5. ALGODON: ESTADISTICAS MUNDIALES-Octubre 1996 | 11. Cultivo del Algodón Orgánico - Octubre 1996 |
| 6. PERSPECTIVAS DE LA OFERTA ALGODONERA EN 1996/97 | 12. ² Directorio |

WORKING PAPERS

I ² Procedural Matters	Déroulement de la 55e Réunion plénière ²	Asuntos de procedimiento ²
II Work Program	Programme de travail	Programa de trabajo y presupuesto
III Election of Officers of the Standing Committee	Election du bureau de la Commission permanente	Elección de las autoridades del Comité Permanente
IV Private Sector Participation in ICAC Affairs	Participation du secteur privé dans les affaires du CCIC	Participación del sector privado en los asuntos del CCIA
V Classification of Secretariat Positions on UN Salary Scale	Classification des positions du Secrétariat d'après l'échelle des salaires des NU	Clasificación de los puestos de la Secretaría de acuerdo a la escala de salarios del las NU
VI Relocation of the Secretariat	Nouvel emplacement du Secrétariat	Reubicación de la Secretaría
VII Amendment of the Rules and Regulations	Amendement du Règlement statutaire	Enmienda al Reglamento
VIII Operating under Rules and Regulations	Fonctionnement selon les règlements	Funcionamiento de acuerdo a reglamentos

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Ms. Ludmila Yrtaeva
Ms. Gulya Zakhidova