



PROCEEDINGS

60th Plenary Meeting of the
International Cotton
Advisory Committee

Victoria Falls, Zimbabwe,
September 2001

PROCES-VERBAL

60ème Réunion Plénière du
Comité Consultatif
International du Coton

Victoria Falls, Zimbabwe
Septembre 2001

ACTAS

60a Reunión Plenaria del
Comité Consultivo
Internacional del Algodón

Cataratas Victoria, Zimbabwe
Septiembre 2001

**PROCEEDINGS
OF THE
60TH PLENARY MEETING**

“Cotton: An African Renaissance”



ICAC
Washington DC USA

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FOREWORD

At the invitation of the Government of Zimbabwe, the 60th Plenary Meeting of the International Cotton Advisory Committee was held in Victoria Falls, from September 16 to 21, 2001.

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 de Zimbabwe, le Comité consultatif international du coton a tenu sa 60e Réunion plénière à Victoria Falls, du 16 au 21 septembre 2001.

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 Zimbabwe, la 60a Reunión Plenaria del Comité Consultivo Internacional del Algodón se celebró en las Cataratas Victoria, del 16 al 21 de septiembre de 2001.

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

GOBIERNOS MIEMBROS

Argentina

Australia

Belgium

Bolivia

Brazil

Burkina Faso

Cameroon

Chad

China (Taiwan)

Colombia

Côte d'Ivoire

Egypt

Finland

France

Germany

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India

Iran

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Uzbekistan

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STATEMENT OF THE 60th PLENARY MEETING

“Cotton: An African Renaissance”

Cotton and cotton textile industries serve as engines of economic growth in both developed and developing countries, and a renaissance in cotton production is occurring in many countries. Many governments recognize that the expansion of cotton production can increase a country's export earnings and can be a major factor in the social and economic development of rural areas.

The International Cotton Advisory Committee met in Victoria Falls, Zimbabwe, during September 16-21, 2001 for its 60th Plenary Meeting since 1939. Representatives from 39 governments and five international organizations participated in the meeting. At the start of its meeting the Committee observed a moment of silence in honor of those harmed by the terrorist attacks on 11 September in the USA. The Committee approved the following statement:

1. According to estimates by the Secretariat, world cotton production is rising to a record of almost 21 million tons in 2001/02, even though international cotton prices were considerably below the long-term average during the past three seasons (Annex I). Cotton production is rising despite low prices because of structural changes including improved technology, the expansion of cotton into new producing areas, the strength of the U.S. dollar that has mitigated the decline in prices for some producers and government measures that protect farmers in some countries from falling prices.

2. The world economy is decelerating and cotton consumption is forecast to increase by only 1% to reach approximately 20 million tons in 2001/02. Therefore, world-ending stocks are anticipated to rise by nearly one million tons. The outlook for slow growth in demand combined with a rising supply implies that a recovery in prices to average levels is unlikely soon. Projections by the Secretariat suggest that the average world cotton price this season will fall to its lowest level since 1972/73. The level of pain caused to producers and export-dependent countries by the decline in prices has been severe.

3. The Committee noted that good trade practices include the settlement of disputes that inevitably arise in international commercial transactions through a legal process of arbitration, and that some parties to contracts fail to abide by arbitral decision. Therefore, in order to bolster confidence in the cotton trading system and to improve the efficiency of the world cotton market, the ICAC urges member governments to:

- Encourage good trade practices and support the principle of the sanctity of contracts, and to
- Encourage their industries to abide by both the spirit and the letter of arbitration arrangements, and
- Make valid arbitral awards enforceable under member countries' laws.

4. The Committee acknowledged that while there are many challenges facing the world's cotton industry, none is greater than competition from chemical fibers. The Committee applauded the creation of the International Forum for Cotton Promotion (IFCP), an initiative focused upon national programs to increase cotton consumption. The Forum will facilitate the development of national information campaigns about cotton and cotton products. The Forum will serve as a clearinghouse for information about fiber demand, proven techniques of cotton promotion, best practices in retail level communication, cost effective measures of boosting consumer demand and market research. Member governments noted that the International Forum for Cotton Promotion could serve as an example of how cooperation within the cotton industry can rapidly translate into programs to address challenges.

5. The subject of government measures that distort production and trade in cotton is of concern to many governments. A number of member governments noted that subsidies and trade barriers in some countries contribute to price volatility and impact adversely the level of cotton production in other countries. Member governments noted that barriers to trade in cotton and cotton textiles hinder economic development, and a number of governments expressed the view that subsidies lower world cotton prices and cause the burden of adjustment to lower cotton prices to fall heavily on producers in countries with limited or no government support. The Committee expressed appreciation for the ongoing efforts made by the EU to reduce subsidies that distort cotton production, and noted that cotton area in the EU is being affected accordingly. Nevertheless, it was noted that in the majority of countries distortions appear to have the effect of increasing the area planted to cotton in countries enjoying forms of support while the area planted to cotton is falling in countries where there is no such support. Therefore, the ICAC urges member countries to:

- Adopt policies to reduce and eventually eliminate the negative effects on trade caused by direct government assistance to cotton production and trade implemented by some countries, and to
- Encourage the WTO to urgently consider trade distortions on the world market caused by measures taken by some governments, and to
- Advise their WTO negotiators to move forward with constructive proposals to reduce the trade and production distortions caused by policies implemented by some governments.

The Committee agreed to the establishment of a Working Group under the direction of the Chair of the Standing Committee with the mission of identifying effective strategies to reduce and eventually eliminate the negative effects on trade caused by direct government assistance to cotton production and trade. The Working Group will report on progress made by countries on the reduction and eventual elimination of such trade distorting practices prior to the 61st Plenary Meeting in 2002.

6. The Committee noted that the use of genetically engineered (GE) cottonseeds by farmers was expanding rapidly worldwide because the use of GE cotton dramatically lowers the need for pesticides used in the production process. The Committee observed that the use of biotechnology is becoming an intrinsic component of the cotton production system in many countries and that governments have an interest in promoting regulation of biotechnology in cotton based on sound science. The ICAC noted that small farmers with low yields due to poor pest control stand to benefit the most from the adoption of GE varieties, though the cost of GE technology may be prohibitive to smallholders. The Committee acknowledges that a preponderance of available evidence suggests that the use of GE cotton varieties is safe. Nevertheless, the Committee acknowledged that many governments and consumers do not approve of the use of biotechnology in agriculture and do not wish to accept biotechnology products.

7. The Committee received reports on how best to encourage improvements in cotton quality through improvements in cotton ginning and how to expand mill use of cotton in developing countries. The primary recommendation in each report was to encourage member countries to eliminate

barriers to imports of machinery and replacement parts used in ginning and cotton spinning. The Committee instructed the Secretariat to consider the implications of this recommendation and to report the results to the Standing Committee. The Committee directed that a project or study be completed to advise and assist member countries, in particular developing member states, in the development and implementation of sound industrial policies that result in and promote increased domestic consumption of cotton through value added processes or programs.

8. The Committee received a report from its Expert Panel on Ginning Methods. The Expert Panel recommended that governments work to revise cotton standards to reflect spinning qualities valued by the textile industry, and the Expert Panel urged governments to ensure that training opportunities are available to managers and employees of gins to ensure that best practices are widely known and followed. The Committee instructed the Secretariat to provide guidance on how these recommendations could best be implemented.

9. The Committee also heard of successful programs to reduce contamination of cotton in regions where labor-intensive harvesting methods are used. These programs include the distribution of educational material to farmers and ginners, efforts to discourage the use of polypropylene bags in the harvesting process by providing farmers with alternative bags, coupled with the enforcement of price penalties for the delivery of contaminated cotton, and the use of internal checks at gins. The Committee recommended that cotton industries in all countries consider the implementation of similar programs.

10. The Committee discussed methods to improve productivity and quality and reduce costs through integrated crop management practices. Transgenic cotton is becoming an important component of integrated pest management practices, and continued monitoring for environmental impacts is necessary. The seminar proposed ways in which the latest technological developments could be applied economically by smallholders, including group farming and cluster/cooperative farming. The development of host plant resistance and plant monitoring in fields are successfully utilized in many countries and need to be adopted widely. The Committee will hold the 2002 Technical Seminar on the topic "Technology, Management and Processing for Quality Fiber."

11. The Committee again confirmed its commitment to continued support of regional networks and world cotton conferences. The World Cotton Research Conference-3 will be held in Cape Town, South Africa from March 9-13, 2003 and pre-registration is already underway.

12. The most recent cotton project to receive support from the Common Fund for Commodities will develop price risk management instruments for use by producers in Eastern and Southern Africa. The ICAC expressed its appreciation to the CFC for supporting commodity development and acknowledged the benefits to the cotton industry of projects financed by the CFC. Since the Fund became fully operational in 1991, a total of nine cotton projects have been approved involving over US\$20 million in grants and loans from the CFC.

13. The Committee engaged in a Round Table discussion with its Private Sector Advisory Panel on the subjects of genetic engineering in cotton, the importance of good trade practices, World Bank development projects and efforts to reduce government measures that distort cotton production and trade. The Committee observed that the ICAC has benefited in concrete and specific ways from the input provided by the PSAP since its creation in 1999, and the service of individual members is much appreciated.

14. The 61st Plenary Meeting of the Committee will be held in Cairo, Egypt, during October 20-25, 2002 at the invitation of the Government of Egypt. The Committee has accepted an invitation from the Government of Poland to host the 62nd Plenary Meeting during September 7-12, 2003.

DECLARATION DE LA 60^{ème} REUNION PLENIERE

"Le coton : une renaissance africaine"

Le secteur du coton et des textiles de coton fait office de moteur de croissance à la fois dans les pays développés et dans les pays en voie de développement, et une renaissance de la production cotonnière se déroule dans bon nombre de pays. De nombreux gouvernements reconnaissent que la croissance de la production cotonnière peut contribuer considérablement aux recettes d'exportation d'un pays ainsi qu'au développement social et économique des zones rurales.

Le Comité consultatif international du coton s'est réuni à Victoria Falls, au Zimbabwe, du 16 au 21 septembre 2001 à l'occasion de sa 60^{ème} Réunion plénière depuis 1939. Des représentants de 39 gouvernements et de cinq organismes internationaux ont pris part à la réunion. Lors de la séance d'ouverture, le Comité a observé une minute de silence en l'honneur des victimes des attaques terroristes du 11 septembre aux Etats-Unis. Le Comité a approuvé les déclarations suivantes :

1. Selon les évaluations du Secrétariat, la production cotonnière mondiale va augmenter jusqu'à atteindre le niveau record de près de 21 millions de tonnes en 2001/2002, ceci malgré le fait qu'au cours des trois dernières campagnes les prix internationaux du coton se situaient bien en-deça de la moyenne à long terme (Annexe I). La production cotonnière augmente malgré la faiblesse des prix. Ceci s'explique par les changements structurels, parmi lesquels il convient de citer les progrès technologiques, l'expansion du coton vers de nouvelles zones de production, la fermeté du dollar américain qui, pour certains producteurs, a compensé la baisse des prix, ainsi que des mesures gouvernementales protégeant les agriculteurs de certains pays contre la chute des prix.

2. L'économie mondiale ralentit et il est prévu que la consommation mondiale ne va croître que de 1% pour atteindre environ 20 millions de tonnes en 2001/2002. Par conséquent, il est prévu que les stocks de clôture vont augmenter de pratiquement un million de tonnes. La perspective d'une lente croissance de la demande combinée à une augmentation de l'offre fait qu'il est peu vraisemblable qu'un retour des prix aux niveaux moyens se produise dans un proche avenir. Les projections du Secrétariat indiquent que la moyenne du prix mondial du coton tombera à son niveau le plus bas depuis 1972/1973. Pour les producteurs et les pays qui dépendent des exportations, les conséquences de la chute des prix sont graves.

3. Le Comité a également noté que les bonnes pratiques commerciales veulent que la résolution des contentieux inhérents aux transactions commerciales internationales se fasse par l'entremise du processus légal d'arbitrage, mais que, certaines parties aux contrats ne respectent pas les décisions des arbitres. Par conséquent, aux fins d'étayer la crédibilité du système de commercialisation du coton et d'améliorer l'efficacité du marché mondial du coton, le CCIC enjoint les gouvernements des pays membres de :

- Encourager les bonnes pratiques commerciales et d'appuyer le principe de l'inviolabilité des contrats, et
- Encourager leurs industries à appliquer à la fois l'esprit et la lettre des accords d'arbitrage, et
- Faire en sorte que les décisions arbitrales soient applicables au titre des lois internes des pays membres.

4. Le Comité reconnaît que parmi les nombreux défis auxquels est confrontée l'industrie cotonnière mondiale, nul n'est plus important que celui de la concurrence des fibres chimiques. Le Comité se félicite de la création du Forum international pour la promotion du coton (FIPC), une initiative portant sur les programmes nationaux de promotion de la consommation du coton. Le Forum facilitera le développement de campagnes nationales d'information sur le coton et ses produits. Le Forum fera office de centrale d'informations sur la demande de fibre, les méthodes de promotion du coton ayant fait leurs preuves, les meilleures campagnes publicitaires réussies au niveau de la vente au détail, les mesures permettant d'encourager la demande des consommateurs et les études de marché. Les gouvernements des pays membres ont indiqué que le Forum international pour la promotion du coton illustre la façon dont la coopération au sein du secteur cotonnier pourrait rapidement déboucher sur des programmes à la hauteur des défis à relever.

5. La question des mesures gouvernementales qui créent des distorsions dans la production et les échanges de coton préoccupe bon nombre de gouvernements. Plusieurs gouvernements de pays membres ont indiqué que les subventions et les barrières commerciales appliquées par certains pays contribuent à la volatilité des prix et ont une incidence négative sur les niveaux de production de coton dans d'autres pays. Les gouvernements des pays membres ont noté que les barrières au commerce du coton et des textiles de coton constituent un obstacle au développement économique. Plusieurs gouvernements de pays membres sont de l'opinion que les subventions font baisser les prix mondiaux du coton et que ce sont surtout les producteurs dans les pays ne bénéficiant que peu ou pas d'appuis publics qui sont victimes de la baisse des prix du coton. Le Comité a exprimé sa reconnaissance pour les efforts que continue à fournir l'Union européenne en vue de diminuer les subventions qui créent des distorsions dans la production cotonnière et a indiqué que la superficie cotonnière dans l'UE est affectée en conséquence. Néanmoins, il a été ajouté que, dans la plupart des cas les distorsions semblent avoir pour effet d'augmenter la surface cotonnière dans les pays bénéficiant de mesures de soutien alors que la tendance est inversée dans les pays où de telles mesures n'existent pas. Par conséquent le CCIC enjoint les pays membres de :

- Adopter des politiques visant à réduire et si possible à supprimer les effets négatifs qu'entraîne sur le commerce l'aide publique directe à la production et au commerce du coton accordée par certains pays, et
- Encourager l'OMC à examiner dans les plus brefs délais les distorsions du commerce mondial causées par certains gouvernements, et
- Conseiller à leurs négociateurs auprès de l'OMC de proposer des mesures constructives pour réduire les déformations du commerce et de la production causées par les politiques mises en œuvre par certains gouvernements.

Le Comité a convenu de créer un Groupe de travail sous la houlette du président de la Commission permanente. Ce Groupe aura pour mission d'identifier les stratégies efficaces permettant de diminuer et si possible d'éliminer les effets négatifs sur les échanges de l'aide publique directe à la production et au commerce du coton. Le Groupe de travail fera rapport sur les progrès réalisés par les pays quant à la réduction et éventuellement l'élimination des pratiques créant des distorsions dans les échanges avant la 61^{ème} Réunion plénière de 2002.

6. Le Comité a noté que l'utilisation par les agriculteurs de semences transgéniques s'étendait rapidement de par le monde parce que l'utilisation du coton modifié génétiquement diminue considérablement la quantité de pesticides requise pour le processus de production. Le Comité a indiqué que l'utilisation de la biotechnologie devient un élément intrinsèque du système de production cotonnier de bon nombre de pays et que les gouvernements ont intérêt à promouvoir la réglementation de la biotechnologie du coton se fondant sur de véritables principes scientifiques. Le CCIC a ajouté que se sont les petits exploitants n'ayant que de faibles rendements du fait d'une mauvaise lutte contre les ravageurs qui profiteront le plus de l'adoption des variétés génétiquement modifiées, bien que leur coût puisse constituer un obstacle à l'accès à cette technologie pour les petits exploitants. Le Comité reconnaît que la plupart des résultats disponibles indiquent que l'utilisation des variétés de coton issues du génie génétique ne présente pas de danger. Néanmoins, le Comité a conscience du fait que de nombreux gouvernements et consommateurs n'approuvent pas l'utilisation de la biotechnologie dans l'agriculture et ne désirent pas accepter les produits génétiquement modifiés.

7. Le Comité a reçu un rapport portant sur la façon d'encourager au mieux les améliorations de la qualité du coton par l'entremise du perfectionnement des méthodes d'égrenage. Le Comité a également été saisi d'un rapport sur les façons d'accroître la consommation industrielle dans les pays en développement. La principale recommandation de chaque rapport consistait à encourager les pays membres à éliminer les barrières aux importations de machines et de pièces de rechange utilisées pour l'égrenage et la filature du coton. Le Comité a donné pour instruction au Secrétariat de considérer les conséquences de cette recommandation et d'en faire rapport à la Commission permanente. Le Comité a demandé qu'on réalise un projet ou une étude aux fins de conseiller et appuyer les pays membres quant au développement et l'exécution de politiques industrielles qui débouchent sur une croissance de la consommation nationale du coton par l'entremise de processus ou de programmes créant la valeur ajoutée.

8. Le Comité a reçu un rapport de son Panel d'experts sur les méthodes d'égrenage. Le Panel d'experts a recommandé que les gouvernements révisent les standards de coton pour les adapter aux besoins qualitatifs de la filature. Le Panel d'experts a enjoint les gouvernements de s'assurer que des opportunités de formation soient offertes aux cadres et aux employés des usines d'égrenage afin de veiller à la diffusion et à l'application des meilleures pratiques. Le Comité a donné instruction au Secrétariat d'orienter les gouvernements quant à la manière d'appliquer au mieux ces recommandations.

9. On a également décrit au Comité certains programmes ayant réduit avec succès la contamination dans des régions où le coton est récolté manuellement. Ces programmes comportent la distribution de documents éducatifs aux agriculteurs et aux égreneurs, des efforts pour décourager l'utilisation des sacs en polypropylène lors de la cueillette en fournissant aux agriculteurs des sacs de remplacement, cette dernière mesure étant complétée par des pénalités sur les prix en cas de livraison de coton contaminé, ainsi que l'utilisation de vérifications internes dans les usines d'égrenage. Le Comité a recommandé que le secteur du coton dans tous les pays considère la mise en œuvre de programmes semblables.

10. Le Comité s'est entretenu sur les méthodes permettant d'améliorer la productivité et la qualité tout en diminuant les coûts par l'entremise des pratiques de gestion intégrée des cultures. Le coton transgénique devient un élément important des méthodes de gestion intégrée des ravageurs et il est nécessaire de surveiller continuellement son impact sur l'environnement. Le séminaire a proposé différentes méthodes économiques pour l'adoption des progrès de la technologie de pointe par les petits exploitants, notamment grâce à l'agriculture en groupe et l'agriculture communautaire ou coopérative. Le développement de la résistance des plantes hôtes et la surveillance des plantes dans les champs ont été utilisés avec succès dans de

nombreux pays. Il convient de généraliser ces pratiques. Le Comité organisera en 2002 un Séminaire technique portant sur « La technologie, la gestion et la transformation permettant de produire des fibres de bonne qualité ».

11. Le Comité a renouvelé son engagement de continuer à appuyer les réseaux régionaux et les conférences mondiales du coton. La Troisième Conférence mondiale sur la recherche cotonnière aura lieu au Cap, en Afrique du Sud, du 9 au 13 mars 2003 et les pré-inscriptions sont déjà en cours.

12. Le plus récent projet cotonnier à avoir bénéficié du Fonds commun pour les produits de base développera des instruments de gestion du risque associé aux prix à l'usage des producteurs en Afrique orientale et australe. Le CCIC a exprimé sa reconnaissance au Fonds commun pour les produits de base pour l'aide qu'il apporte au développement du secteur et a reconnu l'importance que revêtent pour l'industrie du coton les projets financés par le Fonds commun pour les produits de base. Depuis que le Fonds est devenu opérationnel à part entière en 1991, il a approuvé neuf projets sur le coton, pour un total de plus de 20 millions de dollars américains en subventions et en prêts.

13. Le Comité a organisé une table ronde pour s'entretenir avec le Panel consultatif du secteur privé sur le sujet du coton modifié génétiquement, l'importance des bonnes pratiques commerciales, les projets de développement de la Banque mondiale et les efforts visant à réduire les mesures gouvernementales qui créent des distorsions dans la production et le commerce du coton. Le Comité a indiqué qu'il avait profité de manière pratique et spécifique des contributions du PCSP depuis sa création en 1999. La contribution de chaque membre individuel est fort appréciée.

14. La 61ème Réunion plénière du Comité aura lieu au Caire, en Egypte, du 20 au 25 octobre 2002 sur invitation du gouvernement égyptien. Le Comité a accepté une invitation du gouvernement polonais pour accueillir la 62ème Réunion plénière du 7 au 12 septembre 2003.

DECLARACION DE LA 60a REUNION PLENARIA

“El algodón: un renacimiento africano”

Las industrias del algodón y de sus textiles sirven como motores que impulsan el crecimiento económico en los países desarrollados y en aquéllos en vías de desarrollo, y en muchos países se está dando un renacimiento de la producción algodonera. Muchos gobiernos reconocen que la ampliación de la producción algodonera puede incrementar las ganancias del país por concepto de las exportaciones y puede constituir un factor de envergadura en el desarrollo social y económico de las zonas rurales.

El Comité Consultivo Internacional del Algodón se reunió en las Cataratas Victoria, Zimbabwe, del 16 al 21 de septiembre de 2001, en ocasión de su 60a Reunión Plenaria desde 1939. Participaron en la reunión representantes de treinta y nueve gobiernos y cinco organizaciones internacionales. Al inicio de la reunión, el Comité guardó un momento de silencio en honor de las víctimas de los ataques terroristas que tuvieron lugar el 11 de septiembre en los EE.UU. El Comité aprobó la siguiente declaración:

1. Según las estimaciones de la Secretaría, la producción algodonera mundial se está elevando a un nivel récord de casi 21 millones de toneladas en 2001/02, a pesar de que los precios internacionales del algodón fueron considerablemente inferiores al promedio de largo plazo durante las últimas tres temporadas (Anexo I). La producción algodonera está ascendiendo a pesar de precios bajos, debido a los cambios estructurales, incluidos los siguientes: tecnología mejorada, ampliación del algodón hacia nuevas zonas productoras, fortaleza del dólar estadounidense que ha mitigado el descenso de los precios para algunos productores, y las medidas gubernamentales que, en algunos países, protegen a los agricultores de la caída de los precios.

2. La economía mundial se está desacelerando y se pronostica que el consumo algodonero aumentará en apenas el 1%, para alcanzar cerca de los 20 millones de toneladas en 2001/02. Por ende se prevé que las existencias mundiales al cierre se elevarán en casi un millón de toneladas. La perspectiva de un aumento lento de la demanda, combinado con una oferta en alza, implica que una recuperación de los precios a los niveles promedio es improbable a corto plazo. Las proyecciones de la Secretaría sugieren que el precio mundial promedio del algodón en esta temporada descenderá a su nivel más bajo desde 1972/73. El nivel de la penuria causada a los productores y a los países dependientes de la exportación por el descenso de los precios, ha sido severo.

3. El Comité señaló que las buenas prácticas comerciales incluyen la solución de controversias que surgen inevitablemente en las transacciones comerciales internacionales a través de un proceso legal de arbitraje, y que algunas de las partes de los contratos no cumplen con la decisión arbitral. Por ende, con el fin de reforzar la confianza en el sistema comercial del algodón y mejorar la eficiencia del mercado algodonero mundial, el CCIA insta a los gobiernos miembros a:

- Fomentar las buenas prácticas comerciales y apoyar el principio de la inviolabilidad de los contratos.
- Fomentar que sus industrias cumplan, tanto en lo pertinente al espíritu como a la letra, los arreglos de arbitraje.
- Y, hacer que los laudos arbitrales válidos sean aplicables bajo las leyes del país miembro.

4. El Comité reconoció que si bien son muchos los desafíos que enfrenta la industria algodonera mundial, el mayor de todos es la competencia con las fibras sintéticas. El Comité elogió la creación del Foro Internacional para la Promoción del Algodón (FIPA), una iniciativa que se concentra en los programas nacionales para aumentar el consumo algodonero. El Foro facilitará el desarrollo de campañas nacionales de información sobre el algodón y sus productos. Servirá como un centro de información sobre la demanda de fibra, las técnicas comprobadas para la promoción del algodón, las mejores prácticas para la comunicación a nivel de ventas al por menor, las medidas efectivas respecto a los costos para reforzar la demanda de los consumidores, y la investigación de mercado. Los gobiernos miembros indicaron que el Foro Internacional para la Promoción del Algodón podría ser un ejemplo de cómo la cooperación en el seno de la industria algodonera se puede traducir con rapidez en programas que respondan a los desafíos.

5. El tema de las medidas gubernamentales que distorsionan la producción y el comercio del algodón es motivo de preocupación para muchos gobiernos. Una serie de gobiernos miembros señalaron que los subsidios y las barreras comerciales en algunos países contribuyen a la volatilidad de los precios y tienen un efecto adverso sobre el nivel de la producción algodonera en otros países. Los gobiernos miembros indicaron que las barreras al comercio del algodón y de sus textiles, obstaculizan el desarrollo económico y una serie de gobiernos opinaron que los subsidios reducen los precios mundiales del algodón y hacen que la carga de ajustarse a esos precios más bajos recaiga en los productores de los países donde el apoyo gubernamental es nulo o limitado. El Comité reconoció los esfuerzos en curso por la Unión Europea para reducir los subsidios que distorsionan

la producción algodонера y señaló que la superficie dedicada al algodón en la UE se está viendo afectada consecuentemente. No obstante, se señaló que, en la mayoría de los países, las distorsiones parecen tener el efecto de incrementar la superficie dedicada al algodón en los países que disfrutaban de formas de apoyo, mientras que en los países sin ese apoyo, la superficie se está reduciendo. Por ende, el CCIA insta a los países miembros a:

- Adoptar políticas para reducir y, a fin de cuentas, eliminar los efectos negativos sobre el comercio causados por la asistencia gubernamental directa a la producción y el comercio del algodón proporcionada por algunos países.
- Alentar a la OMC a considerar con urgencia las distorsiones del comercio en el mercado mundial causadas por las medidas adoptadas por algunos gobiernos.
- Y, aconsejar a sus negociadores ante la OMC que procedan con la formulación de propuestas constructivas para reducir las distorsiones del comercio y la producción causadas por las políticas ejecutadas por algunos gobiernos.

El Comité acordó crear un grupo de trabajo, bajo la dirección del Presidente del Comité Permanente, cuya misión será identificar estrategias eficaces para reducir y eliminar, consecuentemente, los efectos negativos sobre el comercio, causados por la asistencia gubernamental directa a la producción y el comercio del algodón. El grupo de trabajo informará sobre el avance logrado en los países para reducir y eliminar, subsiguientemente, esas prácticas que distorsionan el comercio antes de la 61a Reunión Plenaria de 2002.

6. El Comité señaló que el uso de semillas producidas por ingeniería genética se está ampliando con rapidez a nivel mundial, ya que el algodón producido por ingeniería genética reduce drásticamente la necesidad de los plaguicidas usados en el proceso de producción. El Comité observó que el uso de la biotecnología se está convirtiendo en un componente intrínseco del sistema de producción algodонера en muchos países y que numerosos gobiernos tienen gran interés en fomentar la reglamentación de la biotecnología en el algodón sobre una base científica sólida. El CCIA indicó que los pequeños agricultores con rendimientos bajos, debido a un mal control de las plagas, son los que más se beneficiarán de la adopción de las variedades producidas por ingeniería genética, aun cuando el costo de esa tecnología podría ser prohibitivo para los pequeños productores. El Comité reconoce que la mayor parte de las pruebas disponibles sugieren que el uso de las variedades producidas por ingeniería genética es seguro. No obstante, el Comité reconoció que muchos gobiernos y consumidores no aprueban el uso de la biotecnología en la agricultura y no quieren aceptar los productos biotecnológicos.

7. El Comité recibió informes sobre la mejor forma de fomentar mejoramientos en la calidad del algodón, mediante mejoras en el desmotado, y sobre cómo ampliar el uso industrial en los países en desarrollo. La recomendación fundamental en cada informe consistió en alentar a los países miembros a eliminar las barreras a las importaciones de maquinaria y de piezas de repuesto usadas en el desmotado y la hilatura del algodón. El Comité dio instrucciones a la Secretaría de considerar las implicaciones de esta recomendación y de presentar un informe sobre los resultados al Comité Permanente. El Comité dio instrucciones para que se realice un proyecto o estudio con el fin de asesorar y prestar asistencia a los países miembros, en particular a los estados miembros en desarrollo, para la formulación y aplicación de políticas industriales sólidas que promuevan y resulten en un mayor consumo interno de algodón mediante programas o procesos de valor agregado.

8. El Comité recibió un informe de su Panel de Peritos sobre los Métodos de Desmotado. El Panel de Peritos recomendó para que los gobiernos se esfuercen por revisar los estándares del algodón, para que reflejen las cualidades de la hilatura que son importantes para la industria textil; y el Panel urgió a los gobiernos a garantizar que haya oportunidades de capacitación disponibles para los gerentes y empleados de las desmotadoras con miras a garantizar un amplio conocimiento y aplicación de las mejores prácticas. El Comité instruyó a la Secretaría a proporcionar orientación sobre la mejor forma de ejecutar estas recomendaciones.

9. El Comité fue también informado de programas exitosos para reducir la contaminación del algodón en las regiones donde se utilizan métodos de recolección que son intensivos en mano de obra. Esos programas incluyen la distribución de material educativo a los agricultores y a los desmotadores, esfuerzos para desalentar el uso de bolsas de polipropileno en el proceso de recolección mediante la provisión a los agricultores de bolsas alternativas, combinado con la imposición de penalizaciones de precios por la entrega de algodón contaminado, y el uso de verificaciones internas en las desmotadoras. El Comité recomendó que las industrias algodonerías de todos los países consideren la puesta en práctica de programas similares.

10. El Comité discutió los métodos para mejorar la productividad y reducir los costos mediante las prácticas para el manejo integrado de la cosecha. El algodón transgénico se está convirtiendo en un componente importante de las prácticas para el manejo integrado de la cosecha y es necesaria la vigilancia continuada de los efectos ambientales. El seminario propuso formas en que los últimos desarrollos tecnológicos podrían ser aplicados económicamente por los pequeños agricultores, incluida la agricultura en grupo y la agricultura en cooperativas/de conjunto. El desarrollo de la resistencia en la planta hospedera y la vigilancia en los algodones se utilizan con éxito en muchos países, siendo necesario que su adopción se amplifique. El Comité celebrará el Seminario Técnico de 2002 sobre el tema “Tecnología, manejo y procesamiento para una fibra de calidad”.

11. El Comité confirmó de nuevo su compromiso de continuar apoyando las redes regionales y las conferencias mundiales del algodón. La Tercera Conferencia Mundial sobre la Investigación Algodonera se celebrará en Ciudad del Cabo, Sudáfrica, del 9 al 13 de marzo de 2003, y la preinscripción ya está en curso.

12. El proyecto más reciente sobre el algodón que recibió el apoyo del Fondo Común para los Productos Básicos, desarrollará instrumentos para el manejo del riesgo de los precios a ser utilizados por los productores de África oriental y meridional. El CCIA expresó su agradecimiento al Fondo Común por apoyar el desarrollo de los productos básicos y reconoció los beneficios derivados para la industria algodonera de los proyectos financiados por ese organismo. Desde que el Fondo entró en operación plena en 1991, se han aprobado en total nueve proyectos algodonerías, para los cuales el Fondo otorgó, en subvenciones y préstamos, más de US\$ 20 millones.

13. El Comité sostuvo una discusión en mesa redonda con su Panel Consultivo del Sector Privado sobre los temas de la ingeniería genética en el algodón, la importancia de las buenas prácticas comerciales, los proyectos de desarrollo del Banco Mundial y los esfuerzos por reducir las medidas gubernamentales que distorsionan la producción y el comercio del algodón. El Comité observó que el CCIA se ha beneficiado, en formas concretas y específicas, de los aportes hechos por el Panel Consultivo del Sector Privado desde su creación en 1999, y agradece profundamente el servicio prestado por sus miembros individuales.

14. La 61a Reunión Plenaria del Comité se celebrará en El Cairo, Egipto, del 20 al 25 de octubre de 2002, por invitación del gobierno de ese país. El Comité aceptó la invitación del gobierno de Polonia, el cual será el anfitrión de la 62a Reunión Plenaria del 7 al 12 de septiembre de 2003.

ЗАЯВЛЕНИЕ 60-го ПЛЕНАРНОГО ЗАСЕДАНИЯ МЕЖДУНАРОДНОГО КОНСУЛЬТАТИВНОГО КОМИТЕТА ПО ХЛОПКУ

"Хлопок: возрождение Африки"

Хлопковая отрасль и промышленность хлопкового текстиля служат двигателем экономического роста как в индустриально развитых, так и развивающихся государствах, причем во многих странах происходит возрождение хлопкопроизводства. Многие правительства осознают, что расширение масштабов хлопкопроизводства может увеличить экспортные доходы страны и стать основным фактором социально-экономического развития сельской местности.

В период 16-21 сентября в г.Виктория-Фоллс, Зимбабве, состоялось 60-е пленарное заседание созданного в 1939 г. Международного консультативного комитета по хлопку, в котором приняли участие представители 39 правительств и пяти международных организаций. В самом начале заседания члены Комитета почтили минутой молчания память людей, пострадавших во время террористических актов в США 11 сентября. Комитет принял следующее заявление:

1. В соответствии с оценками Секретариата, в 2001-2002 г. мировое хлопкопроизводство возрастает до рекордного уровня равного почти 21 млн. тонн, хотя в течение последних трех сезонов международные цены на хлопок были значительно ниже долгосрочных средних цен (Приложение I). Несмотря на низкие цены хлопкопроизводство увеличивается в результате структурных изменений, в т.ч. совершенствования технологии, расширения масштабов хлопковой отрасли в новых районах-производителях, усилению доллара США, которое смягчило падение цен для некоторых производителей, а также правительственным мерам, направленным на защиту фермеров некоторых стран от снижения цен.

2. Темпы роста мировой экономики замедляются, причем по прогнозам на 2001-2002 г. хлопкопотребление поднимется только на 1% и достигнет около 20 млн. тонн. Поэтому считается, что мировые конечные запасы увеличатся примерно на 1 млн. тонн. Перспективы медленного роста спроса вкупе с увеличением ресурсов свидетельствуют о том, что вряд ли скоро произойдет оздоровление цен до средних величин. На основании прогнозов Секретариата, в этом сезоне средняя мировая цена на хлопок опустится до самого низкого уровня с 1972-1973 г. Ущерб, нанесенный производителям и зависящим от экспорта странам, был весьма тяжелым.

3. Комитет отметил, что нормальная торговая деятельность предполагает урегулирование споров, неизбежно возникающих в международных коммерческих сделках, путем проведения правового арбитражного процесса и что некоторые стороны контрактов не придерживаются арбитражных решений. Поэтому для повышения уверенности в системе торговли хлопком и продуктивности мирового хлопкового рынка МККХ призывает страны-члены предпринимать следующие меры:

- Поощрять нормальную торговую деятельность и поддерживать принципы святости контрактов.
- Содействовать тому, чтобы их промышленный сектор придерживался духа и буквы арбитражных договоренностей.
- Сделать исполнимыми обоснованные арбитражные решения.

4. Комитет признал, что несмотря на множество трудностей, стоящих перед мировым хлопковым хозяйством, ни одна из них не является более насущной, чем конкуренция со стороны химических волокон. Комитет приветствовал создание Национального форума по рекламированию хлопка - инициативы, направленной на развитие национальных программ с целью повышения уровня хлопкопотребления. Форум ускорит разработку общенациональных информационных кампаний относительно хлопка и хлопковой продукции, будет служить распределительным пунктом информации о спросе на волокно, апробированных способах рекламирования хлопка, наилучших методах коммуникации на уровне розничной торговли, эффективных стоимостных мерах резкого повышения потребительского спроса и исследовании рынка. Правительства-члены отметили, что этот Форум может служить примером того, как сотрудничество в хлопковом секторе может быстро превратиться в программы рассмотрения трудностей.

5. Многие государства обеспокоены правительственными мерами, искажающими производство и торговлю хлопком. Ряд стран-членов отметил, что субсидии и торговые барьеры в некоторых странах приводят к непостоянству цен и отрицательно влияют на уровень хлопкопроизводства в других странах. Было отмечено, что препятствия на пути торговли хлопком и хлопковым текстилем мешают

экономическому развитию, причем некоторые страны выразили мнение о том, что субсидии снижают мировые цены на хлопок и приводят к тому, что ноша приспособления к более низким ценам на хлопок ложится почти целиком на плечи производителей в странах с ограниченной государственной поддержкой или вообще без нее. Комитет выразил благодарность ЕС за проводимые им мероприятия по сокращению субсидий, искажающих хлопкопроизводство, и отметил, что субсидии влияют соответственно и на хлопковую отрасль ЕС. Тем не менее было замечено, что в большинстве стран искажения, скорее всего, приводят к расширению площадей под хлопчатником в странах, где наблюдаются определенные формы поддержки, в то время как площади под хлопчатником уменьшаются в странах, не имеющих такой поддержки. Поэтому Комитет призывает страны-члены проводить следующую политику:

- Принять меры по сокращению и последовательному устранению отрицательных воздействий на торговлю, вызванных прямой государственной помощью производству и торговле хлопком, оказываемой в некоторых странах.

- Настоятельно просить ВТО срочно рассмотреть искажения в торговле на мировом рынке, вызванные мерами, предпринимаемыми некоторыми правительствами.

- Призвать участников переговоров в ВТО продолжить разработку конструктивных предложений по сокращению деятельности, связанной с искажениями торговли и производства, которые являются результатом политики, проводимой некоторыми правительствами.

Комитет согласился создать Рабочую группу под руководством председателя Постоянного комитета, задача которой состоит в определении эффективных стратегий по сокращению и последовательному устранению отрицательных воздействий на торговлю, вызванных прямой правительственной помощью производству и торговле хлопком. Рабочая группа доложит о ходе работ в странах по сокращению и последовательному устранению таких искажающих торговлю методов до проведения 61 пленарного заседания в 2002 г.

6. Комитет отметил, что масштабы применения фермерами генетически модифицированных (ГМ) хлопковых семян быстро расширялись во всем мире, т.к. наличие ГМ-хлопчатника резко снижает потребности в пестицидах, используемых в производственном процессе. Считается, что применение биотехнологии становится существенным компонентом хлопкопроизводительной системы во многих странах и что правительства проявляют интерес к регулированию биотехнологии в хлопковом хозяйстве на базе обоснованной науки. МККХ заметил, что в результате применения ГМ-сортов больше всех выигрывают мелкие фермеры, у которых низкая урожайность из-за слабой борьбы с вредителями, хотя стоимость ГМ-технологии может оказаться непомерно высокой для мелких хозяйств. Было признано, что преобладающее количество имеющихся доказательств свидетельствует о безопасности использования ГМ-сортов хлопчатника. Тем не менее Комитету известно, что многие правительства и потребители не одобряют применение биотехнологии в сельском хозяйстве и не желают признавать биотехнологические продукты.

7. Комитет заслушал сообщения о наилучших методах обеспечения повышения качества хлопка путем совершенствования процесса его джинирования и о способах расширения масштабов промышленного использования хлопка в развивающихся странах. Основные рекомендации, представленные в каждом докладе, сводились к тому, что нужно призвать страны-члены устранить барьеры на пути импорта оборудования и запасных частей, применяемых в джинировании и прядении хлопка. Комитет поручил Секретариату рассмотреть возможность учета этих рекомендаций и доложить о результатах Постоянному комитету. Комитет указал на необходимость завершения проекта или исследования, нацеленных на выдачу рекомендаций и оказание помощи странам-членам, в частности, развивающимся государствам-членам относительно разработки и внедрения эффективных промышленных методов, которые будут содействовать росту внутреннего хлопкопотребления путем реализации важных процессов или программ.

8. Комитет заслушал доклад экспертной группы по методам джинирования, которая рекомендовала правительствам пересмотреть хлопковые стандарты для отражения важного для текстильной промышленности качества прядения. Эта группа призвала правительства предоставить возможность обучения менеджеров и работников хлопкоперерабатывающих предприятий с тем, чтобы обеспечить широкомасштабную информированность о наилучших практических методах и их поддержку. Комитет поручил Секретариату разработать директивы о наилучших способах внедрения этих рекомендаций.

9. Комитет также заслушал сообщения об успешных программах по уменьшению загрязнения

хлопка в регионах, где применяются трудоемкие методы уборки урожая. Эти программы включают рассылку учебных материалов фермерам и работникам джинов, меры по недопущению использования полипропиленовых мешков при уборке урожая путем предоставления фермерам альтернативных мешков, а также наложение ценовых штрафных санкций при поставке загрязненного хлопка и проведение внутренних проверок на хлопкоперерабатывающих предприятиях. Комитет вынес постановление о том, чтобы хлопковые отрасли всех стран рассмотрели возможность внедрения подобных программ.

10. Комитет обсудил методы повышения производительности и качества, а также снижения затрат путем реализации комплексных методов выращивания хлопчатника. Трансгенный хлопок становится важным компонентом комплексных методов выращивания хлопчатника, при которых необходимо непрерывное наблюдение за экологической ситуацией. На семинаре речь шла о предлагаемых путях экономичного применения новейших технологических разработок мелкими хозяйствами, в т.ч. группового и коллективно-кооперативного ведения сельскохозяйственных работ. Развитие сопротивляемости растений-хозяев и слежение за растениями в полевых условиях успешно применяются во многих странах, причем их необходимо широко использовать. В 2002 г. Комитет проведет технический семинар на тему "Технология получение и переработка качественного волокна".

11. Комитет еще раз подтвердил свою приверженность непрерывной поддержке региональных сетей и международных конференций по хлопку. Третья Международная конференция по научным исследованиям в области хлопка состоится в период 9-13 марта 2003 г. в Кейптауне, Южная Африка. Предварительная регистрация для участия в этой конференции уже проводится.

12. В самом последнем хлопковом проекте, который получит поддержку Общего фонда для сырьевых товаров (ОФСТ), будут разработаны средства управления ценовым риском для их использования производителями в Восточной и Южной Африке. МККХ выразил благодарность Общему фонду для сырьевых товаров за поддержку развития сырьевых товаров и указал на преимущества финансируемых ОФСТ проектов для хлопковой отрасли. Начиная с 1991 г., когда Фонд стал работать в полную силу, в совокупности было утверждено девять проектов в области хлопка, причем сумма грантов и ссуд от ОФСТ составила свыше 20 млн. долларов США.

13. Комитет участвовал в дискуссии за "круглым столом" с представителями Консультативной группы частного сектора относительно вопросов генетической инженерии в хлопчатнике, важности нормальной торговой деятельности, проектов и усилий Всемирного банка по сокращению правительственных мер, искажающих производство и торговлю хлопком. Комитет признал, что МККХ получил преимущества конкретным и определенным образом благодаря информации, предоставленной этой группой с момента ее создания в 1999 г., и выразил большую благодарность ее членам за проделанную работу.

14. По пригласению правительства Египта 61-е пленарное заседание Комитета состоится в период 20-25 октября 2002 года в г.Каире. Комитет принял приглашение правительства Польши провести 62-е пленарное заседание в период 7-12 сентября 2003 года.

ANNEX I
SUPPLY AND DISTRIBUTION OF COTTON
September 21, 2001

Years Beginning August 1

	1997	1998	1999	2000 Est.	2001 Proj.	2002 Proj.
	Million Metric Tons					
BEGINNING STOCKS						
WORLD TOTAL	9.457	9.921	9.858	9.019	8.55	9.53
CHINA (MAINLAND)	4.002	4.299	4.130	2.820	2.20	2.00
USA	0.865	0.846	0.858	0.854	1.22	1.91
NET EXPORTERS	3.920	4.022	4.123	4.400	4.53	5.70
NET IMPORTERS 1/	5.537	5.900	5.735	4.619	4.02	3.83
PRODUCTION						
WORLD TOTAL	20.037	18.697	19.081	19.323	20.85	20.08
CHINA (MAINLAND)	4.602	4.501	3.829	4.420	4.80	4.58
USA	4.092	3.030	3.694	3.742	4.36	3.83
INDIA	2.686	2.805	2.652	2.384	2.79	2.76
PAKISTAN	1.561	1.494	1.911	1.802	1.82	1.68
UZBEKISTAN	1.139	1.000	1.128	0.963	0.97	0.95
TURKEY	0.838	0.871	0.791	0.880	0.90	0.92
OTHERS	5.120	4.996	5.076	5.131	5.23	5.34
CONSUMPTION						
WORLD TOTAL	19.344	18.886	19.804	19.730	19.91	20.17
CHINA (MAINLAND)	4.700	4.600	4.800	5.000	5.05	5.13
INDIA	2.760	2.781	2.939	2.873	2.95	2.99
EU, C. EUR. & TURKEY	2.579	2.269	2.456	2.420	2.46	2.49
USA	2.471	2.265	2.230	1.916	1.84	1.80
EAST ASIA & AUSTRALIA	1.922	1.997	2.127	2.105	2.09	2.09
PAKISTAN	1.543	1.625	1.700	1.750	1.80	1.85
BRAZIL	0.783	0.822	0.885	0.900	0.90	0.92
CIS	0.438	0.442	0.542	0.618	0.65	0.68
OTHERS	2.148	2.085	2.126	2.148	2.17	2.22
EXPORTS						
WORLD TOTAL	5.964	5.480	6.136	5.741	5.89	6.23
USA	1.633	0.946	1.470	1.459	1.83	1.96
UZBEKISTAN	1.050	0.900	0.900	0.800	0.70	0.70
FRANCOPHONE AFRICA	0.836	0.839	0.854	0.679	0.81	0.88
AUSTRALIA	0.575	0.660	0.696	0.834	0.61	0.71
GREECE	0.187	0.249	0.300	0.234	0.24	0.23
ARGENTINA	0.217	0.244	0.079	0.105	0.06	0.06
CHINA (MAINLAND)	0.006	0.148	0.368	0.096	0.10	0.10
IMPORTS						
WORLD TOTAL	5.762	5.441	6.082	5.683	5.89	6.23
EAST ASIA & AUSTRALIA	1.793	1.977	2.051	2.010	2.07	2.04
EU, C. EUR. & TURKEY	1.698	1.396	1.673	1.450	1.48	1.43
SOUTH AMERICA	0.581	0.474	0.545	0.345	0.35	0.35
CIS	0.273	0.263	0.309	0.352	0.35	0.35
CHINA (MAINLAND)	0.402	0.078	0.030	0.053	0.15	0.40
TRADE IMBALANCE 2/	-0.202	-0.039	-0.054	-0.057	0.00	0.00
STOCKS ADJUSTMENT 3/	-0.027	0.165	-0.062	-0.004	0.00	0.00
ENDING STOCKS						
WORLD TOTAL	9.921	9.858	9.019	8.550	9.49	9.40
CHINA (MAINLAND)	4.299	4.130	2.820	2.197	2.00	1.75
USA	0.846	0.858	0.854	1.219	1.91	1.98
NET EXPORTERS	4.022	4.123	4.400	4.531	5.66	5.84
NET IMPORTERS 1/	5.900	5.735	4.619	4.019	3.83	3.56
ENDING STOCKS/USE 4/	0.41	0.40	0.39	0.43	0.51	0.53
COTLOOK A INDEX 5/	72.20	58.90	52.80	57.20	47*	50*

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

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. The estimates for 2001/02 and 2002/03 are based on net China (Mainland) trade and world-less-China (Mainland) ending stock-to-use ratio.

* 95% confidence interval extends 12 cents above and below the point estimate.

Inauguration

9:00 AM, Monday September 17, 2001
Mr. Sylvester Nguni in the Chair

The SECRETARY GENERAL introduced Mr. Sylvester Nguni as Chairman of the Plenary Meeting. Mr. Nguni is Managing Director of The Cotton Company of Zimbabwe.

The CHAIR asked for a moment of silence in honor of people harmed in terrorist attacks in New York City, Washington, DC and Pennsylvania the previous week. There was a moment of silence.

In his welcoming remarks, the CHAIR said that it was with great pride that he stood in Victoria Falls, in his own country, as chairman of the 60th Plenary Meeting of the International Cotton Advisory Committee. He noted that there had been some sleepless nights over preparations for the meeting, including the news that the conference venue had gone up in smoke just two months earlier. However, all difficulties had been overcome with teamwork and commitment, and he took great pleasure in seeing the large number of friends from so many countries that were attending the meeting. He acknowledged the support of Standard Chartered Bank Zimbabwe as the principal sponsor, as well as the support of Cargill, Lummus, the Zimbabwe Farmers Union, the Commercial Cotton Growers Association and The Cotton Company of Zimbabwe. He also acknowledged the help given by officials of the Ministry of Agriculture and other ministries and departments of government. He pointedly observed that without delegates and observers there would be no meeting, and he thanked participants for their support in accepting the invitation of Zimbabwe to meet in Victoria Falls. Mr. Nguni's remarks are a statement of the meeting.

The CHAIR welcomed the Honorable Doctor Joseph M. Made, Minister of Lands, Agriculture and Rural Resettlement and invited him to offer his Inaugural Remarks. [*Dr. Made delivered his remarks on Thursday, September 20.*]

Dr. Made expressed sorrow for the tragic events in the USA and said that the government and people of Zimbabwe are saddened by what had happened. He welcomed all participants to the magnificent backdrop of the Victoria Falls and said that the Zimbabwean government is pleased and privileged to host the 60th Plenary Meeting. He recounted briefly the history of cotton production in Zimbabwe from the early years of the last century. He noted that a significant expansion took place in the 1960s and that new varieties bred at Kadoma specifically for local conditions were introduced in the 1960s and 1970s.

The 1969 cotton Marketing and Control Act contributed to the organization of the industry. Un-

der this Act, the Cotton Marketing Board controlled most facets of the industry and helped ensure that cotton from Zimbabwe gained market premiums from assured quality, measures that were essential at the time in order to establish a viable production basis. Until 1980, cotton production was based mainly on large-scale commercial growing areas, but with independence increased production by smallholder farmers in communal areas started. For many farmers, this was their first experience with growing a cash crop, and national production expanded. Economic development started in cotton producing communal farming areas on the back of seed cotton sales, and smallholder farmers effectively adopted the skills required in cotton production.

In 1995 the government deregulated the industry and established the National Cotton Council encompassing all sectors of the industry. The Cotton Marketing Board was privatized and became The Cotton Company of Zimbabwe, and the industry has grown from strength to strength. Seed cotton production, which was 185,000 tons in 1980, reached a record 358,000 tons last year. Smallholders contributed a massive 85% of the 1999 crop, compared with just 20% of the smaller 1980's crop. The expansion of cotton production has increased export-earning capacity and has been a major factor in the social and economic development of rural areas. He reported that by any measure cotton production in Zimbabwe is a success and the lessons learnt and practices applied can be of use in other countries.

Dr. Made said he considered membership in the ICAC valuable to Zimbabwe, and he appreciated the information received from the Secretariat. He said the information provided concerning the distortions caused by subsidies was particularly interesting. He observed that the removal of subsidies in the Zimbabwean cotton industry resulted in efficient production and marketing, customer satisfaction and great strides in social and rural development. He said that the repeal of government measures that distort international trade in cotton will improve the efficiency of trade and will have a multiplier effect on the benefits of cotton production in many producing countries.

Dr. Made concluded by wishing delegates a fruitful and stimulating deliberations.

The CHAIR thanked Dr. Made for his remarks and for the support of the government for the ICAC. Dr. Made's remarks are a statement of the meeting.

The CHAIR introduced the Secretary General to give the Report of the Executive Director.

The SECRETARY GENERAL began by saying that we are all internationalists now. He said that

no country could afford an attitude of exceptionalism, believing it can operate individually in exceptional apartness from a sometimes-difficult world of competing ideas and differing values. He asked why, given the uncertainties of travel, did the Committee bother to meet during difficult times. He answered the question by noting that the ICAC had been created 62 years ago, despite the outbreak of World War II, by men of vision who saw beyond the confines of their immediate situation and realized that through a shared commitment to open and candid exchange of views, coupled with cooperation toward the improvement of the world cotton economy, the circumstances of national cotton markets could be improved.

He said that this vision was still valid and provided the rationale for continuing to meet. He congratulated the host country for one of the most broadly representative ICAC meetings in recent history with more than 40 countries represented. He said that we meet not because we don't care about difficulty. We meet because meeting is worth it.

The SECRETARY GENERAL said that the ICAC is meeting during a period of industry crisis caused by the unanticipated decline in cotton prices since December 2000. He noted that the Secretariat did not realize that the changes affecting the market are structural in nature, rather than transient, until well after prices had begun to fall, and that a new understanding of the underlying factors affecting cotton prices is necessary. He said that four factors seem to be influencing the shift in the level of world cotton supply: Improved technology, the strength of the U.S. dollar, the development of new cotton areas and government measures. He observed that rising world production means that a recovery in prices to average levels is not likely soon.

The SECRETARY GENERAL said that the mission of the ICAC is to assist governments in fostering a profitable and healthy world cotton industry. The Committee serves as a catalyst for cooperative action by governments and industry segments in the pursuit of broadly shared goals. The role of the ICAC is to raise awareness, disseminate information and to facilitate cooperative action.

He reviewed the agenda for the 60th Plenary Meeting and said that there were six major topics that would receive emphasis during the week, and that our broad objective was to expand understanding and cooperation in the areas of government measures, demand enhancement, good trade practices, improving quality, genetic engineering in cotton, and integrated crop management.

The SECRETARY GENERAL welcomed delegates from non-member countries and said that

all participants in ICAC plenary meetings were fully welcome. He expressed the hope that governments would consider joining the Committee, saying that membership in the ICAC provides the avenue for each cotton industry to join fully into the fraternity of cotton countries in discussions of cotton issues of international scope and significance.

He noted that the past year has been a successful one for the ICAC. He acknowledged the efforts of the nine members of the Secretariat. He expressed a special thanks to members of the Zimbabwe Organizing Committee who have worked under difficult circumstances to make this meeting a success. He also recognized the efforts already underway in Egypt and Poland to host the 61st and 62nd Plenary Meetings in 2002 and 2003. He expressed appreciation for the work of the Standing Committee this past year, saying that the four institutions of the ICAC, the Advisory Committee, the Standing Committee, the Private Sector Advisory Panel and the Secretariat, are working well together. The Standing Committee and its officers this past year, Mr. Blum, Mr. Liévano, and Mr. Malhotra, deserve much credit for their work. He also thanked Mr. Stanley Anthony who serves as Chair of the Expert Panel on Ginning, and Mr. Fritz Grobien who served as Chair of the Private Sector Advisory Panel. The Expert Panel on Ginning and the PSAP have contributed much to the work of the ICAC this year. The *Report of the Executive Director* is attached.

The CHAIR thanked the Secretary General for his remarks and recognized the delegate of Brazil.

The delegate of BRAZIL noted the absence of Mr. Pellegrino, a long-time supporter of the ICAC from Argentina who has traditionally offered words of thanks to the host country at the opening of plenary meetings. As a neighbor of Argentina, Brazil would be happy to substitute for Argentina this year. The delegate said that in the name of all the delegates present, the Brazilian delegation would like to extend its appreciation for the warm welcome received in this magnificent setting in Victoria Falls and the outstanding hospitality and charm of the people. He congratulated the Organizing Committee which, despite all the difficulties and adventures had made this event possible. He also thanked the Secretariat of the ICAC because its hard work had contributed to the success of the plenary meeting. The delegate's remarks are a statement of the meeting.

Seeing that no other delegates wished to speak, the CHAIR adjourned the meeting at 10:45 am.

[The Report of the Chairman of the Standing Committee, which is attached, was presented during the Second Plenary Session.]

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

ATTACHMENTS

Report of the Chairman of the Standing Committee

J. Lawrence Blum
United States

On behalf of the members of the Standing Committee, I extend a sincere thanks and congratulations to the Government of the Zimbabwe and the organizers of this conference—Mr. Nguni and the Zimbabwe Organizing Committee. The title of this conference, “Cotton: An African Renaissance,” captures the rapid development of the Zimbabwe cotton industry that in six short years has transformed itself from a state-controlled sector to what it is today, a free enterprise industry looking optimistically to the future. Congratulations have been well earned by the Organizing Committee. First, for planning the program and series of events that will advance the ICAC agenda of fostering a healthy world cotton economy and then executing the program under the most severe of challenges. We all look forward to being here at Victoria Falls, to enjoying the hospitality of the people of Zimbabwe, and for a real “Out of Africa” experience.

Thanks to the executive director, Terry Townsend, and the members of the ICAC staff for the guidance, support and the assistance they have enthusiastically and ably provided in many different ways. It is the good work of Terry and the ICAC staff that allowed me to hopefully make a small contribution to the continuing development and changing agenda of the ICAC. A sincere thanks to each and every member of the Secretariat.

This morning I will focus upon reporting to you on the changing—and I repeat, changing—role of the Standing Committee, a role that has evolved significantly in the nearly four years I have had the privilege to participate in this committee. Today, the role of the Standing Committee includes that of encouraging and helping the Secretariat to serve as a catalyst for cooperative endeavors by governments and the private sector. Increasingly, your Standing Committee is functioning as a vehicle for turning member country interests and their cotton industry interests into ICAC initiatives.

However, your Standing Committee has not neglected its traditional duties, the administrative and financial oversight of the Secretariat. We continue to diligently perform these duties, and the Secretariat continues to receive high marks for its performance in these areas. In this regard, a special thanks to Mr. Liévano and Mr. Malhotra, the First and Second Vice Chairs respectively of the Standing Committee, for their good work in chairing subcommittees that expedited and focused the work of the Standing Committee.

With Standing Committee support and encouragement, the traditional ICAC functions are changing. One example of this is in the information arena. The ICAC serves as a unique source of information on the cotton economy of the world. The ICAC has aggressively taken advantage of modern information technology to provide you more timely, more diverse and more complete information—information that is immediately available to you from their home page. The ICAC staff is always anxious to know what information and in what form is most important to you—you need to communicate your informational interests to the ICAC staff. I can assure you they will be responsive. An example of the Secretariat's information initiative is the cooperative effort with the FAO to again publish the World Textile Fiber Consumption Survey. Resources for this survey are coming from revenue earned under the Secretariat's business plan initiatives. This project is an excellent example of how the business plan is helping to increase services provided by the ICAC to the world cotton industry.

The agenda for this meeting speaks to the rapid change of the role of ICAC. One example of this is the roundtable discussion with the Private Sector Advisory Panel. This Panel, working through the Standing Committee, has helped focus ICAC attention on the need for risk management education; the development of a business plan to explore revenue opportunities, especially through the provision of information services as well as private sector involvement at plenary meetings; the form and structure of plenary meetings; the formation and report of an expert panel on biotechnology; and the distribution of information on the need for good trading practices. A special thanks to the members of the Private Sector Advisory Panel. These individuals participate at their own expense, taking time from their very busy schedules to provide their advice and encouragement to the ICAC. This afternoon, members of the Steering Committee will have the opportunity to join the Panel in a roundtable discussion on a broad range of items. This dialogue with the private sector is a new event for the plenary meeting, one that I believe deserves to become a permanent part of the agenda. Their cooperation with the ICAC has been effective, constructive and welcomed. We look forward to a long and continuing close working relationship with the Panel.

The agenda for the plenary meeting includes a session on demand enhancement, a subject in which your Standing Committee has expressed growing interest. There are many challenges facing the world's cotton industry but none is greater than the competition from synthetics—cotton's percentage of the world's fiber usage is now only about 40 percent. The Secretariat has expeditiously responded to this challenge by facilitating the creation of the Consortium for Cotton Promotion—a program focused upon national

programs to increase cotton consumption.

The mission of the Consortium is to enhance demand and retail sales for cotton products in a world market threatened by increased production and consumption of chemical fibers. The Consortium will facilitate the development of national information campaigns about cotton and cotton products targeted at domestic consumers, thereby helping to build world demand for cotton in each country. The Consortium will serve as a clearinghouse for information about fiber demand, proven techniques of cotton promotion, best practices in retail level communication, cost effective measures of boosting consumer demand and market research. This initiative illustrates how cooperation and communication from member countries and the cotton industry can rapidly translate into programs to address challenges. The Consortium is an ideal example of the Secretariat's role as a catalyst for cooperative endeavors by governments and the private sector.

And lastly, this week's agenda focuses upon the improvement of cotton quality and includes a report on improving ginning methods. Your Standing Committee authorized the creation of an expert panel in response to member and private sector expressions of interest in this topic. The importance of meeting the needs of cotton's customers, the textile industry, will focus future interest in such topics as grading standards.

The Secretariat's agenda continues to diversify in response to the needs of the cotton sector, but be assured that your Standing Committee will pay needed attention to ensuring the Secretariat's resources are not overburdened. The Secretariat's initiatives are directly in response to information received from you—all of the participants in this conference. I believe that the key role of your Standing Committee is to foster these communications, to prioritize initiatives and provide the Secretariat with guidance and help. But we need your input if we are to perform our duties and to meet the high expectations that are rightly expected of the ICAC.

In closing, thanks to the delegates to the conference for their participation—especially those of you who have traveled significant distances to be here. I am confident you will find this program and events of considerable value. The members of the Standing Committee look forward to the opportunity to talk to you during the informal events. I join the executive director in urging all countries to make a commitment to include their Standing Committee delegates from Washington in their delegations to each plenary meeting. The Standing Committee is responsible for approving the agenda of each plenary meeting and overseeing the implementation of decisions taken by the Advisory Committee. Standing Committee delegates can do their jobs much more effectively if they take part in the plenary meetings. I want to thank the Standing Committee delegates who have traveled to Victoria Falls

because this event provides a unique opportunity for each of us to educate ourselves as to the needs of this industry—valuable information for the work of the Standing Committee in the coming year.

On a personal note, the Standing Committee, by consensus, recommends Mr. Alfonso Liévano of Colombia for the post of Chair, Mr. Ajai Malhotra of India as the First Vice Chair, and Ms. Chigozie Obi-Nnadozie of Nigeria as Second Vice Chair of the Standing Committee for 2001-2002. I fully support their nominations and thank them for all the help they gave me this past year.

And lastly, it has been a privilege to chair the Standing Committee this past year—I thank you for that opportunity.

Report of the Executive Director

Terry P. Townsend

Introduction

The ICAC is meeting this year for the 60th time during a period of industry crisis caused by the unanticipated decline in cotton prices since December 2000. The Cotlook A Index fell to 45 cents per pound by July 2001, one of the lowest since 1973/74. The level of pain caused to producers and export-dependent countries in 2001 was particularly severe because the fall in prices since December came after five consecutive seasons of declining average values. Not since the 1950s had average world cotton prices fallen for more than two consecutive seasons, and prices had been expected not only to recover in 2000/01 but to continue rising to at least the long run average over the next several years. Consequently, the decline in prices in 2001 was especially shocking, and the impacts have been very harsh.

It is the job of the Secretariat to anticipate major structural changes in the world cotton market, and we did not do this job in a timely fashion prior to the current crisis. Not until April 2001, after cotton prices had already fallen by one-fifth since December 2000, did the Secretariat begin to realize that the changes affecting the market are structural in nature, rather than transient, and that a new understanding of the underlying factors affecting cotton prices is necessary.

The failure to anticipate the decline in prices during 2001 was rooted in observations from the 1990s. Beginning in the mid-1990s, the Secretariat noted that the world cotton yield was not increasing, and that the stagnation in yields was caused by persistent, specific problems with disease, resistance to pesticides and economic dislocation. All of the gain in world cotton produc-

tion between 1950/51 and the early 1990s resulted from increases in yields. Between the 1950s and the 1990s, world cotton area varied within a relatively narrow range. Therefore, with the world yield no longer climbing in the 1990s, it seemed that world production would not expand. With economic growth and increases in population leading to a rise in cotton use, the Secretariat expected that demand would climb while supply did not, resulting in above-average cotton prices in most seasons.

This basic view of world cotton fundamentals (stagnant supply confronting rising demand, resulting in above-average prices) seemed accurate in the mid-1990s when the Cotlook A Index climbed to more than \$1 per pound. The decline in prices during 1995/96, 1996/97 and 1997/98 seemed justified by the rise in production after 1994/95, and few had expected that the exceptional prices of 1994/95 would be sustained. When prices continued lower in 1998, the fall was rationalized by the Asian financial crisis that began in 1997 and by lower imports by China (Mainland). When prices continued lower still in 1999/00 for a fifth consecutive season, the explanation again was trade policies in China (Mainland) and additional currency devaluations in Russia and Brazil.

But, if the expectation of tight supplies and rising prices was valid, after five consecutive seasons of falling prices, prices would rise in 2000/01. And indeed the Cotlook A Index did rise in 2000, climbing to 66 cents by December and seeming to validate the expectation that prices would be above average in most years. The Secretariat expected the Cotlook A Index to continue higher in 2001, and prices close to the long run average of 73 cents were expected by 2001/02. But then, the sharp decline in prices this year that carried the A Index to less than 50 cents per pound forced a questioning of the basic assumptions that world supply was stagnant while demand was rising.

The expectation that stagnant supply would confront rising demand was partially right; world cotton demand rose to a record in 1999/00, and additional growth is expected over the next two seasons as world economic growth improves and current cotton prices encourage increased cotton use. Nevertheless, demand is rising slowly at just 1% per year, compared with average increases of 2% per year prior to the 1990s. However, the expectation that supply is stagnant does not seem to be valid. World production rose in 2000/01 to more than 19 million tons, and production is forecast to increase to 20 million tons in 2001/02, despite prices near the lowest levels in 28 years. In economic terms, the world cotton supply curve seems to be moving to the right, meaning that even at current prices, production is rising.

Four Factors Expanding Supply

Four factors seem to be influencing the shift in

the level of world cotton supply: Improved technology, the strength of the U.S. dollar, the development of new cotton area and government measures. The most visible of the new technologies is genetic engineering. GE varieties already account for 16% of world cotton area and is the most rapidly adopted technology in the history of agriculture. The primary impact of GE varieties is not higher yields. Instead, the technology is primarily risk-reducing and cost-reducing, leading to larger area and greater production. The most significant impact of the Bt varieties that provide bollworm resistance has been in China (Mainland). Production in East China, affected in the early 1990s by resistance among bollworms, climbed about 300,000 tons between 1999/00 and 2000/01 largely because of the adoption of Bt varieties. GE varieties account for about 30% of area in China and Australia, and two-thirds of area in the USA, and field trials are underway in other producing countries. Incremental advances in proven technologies such as irrigation management, pesticide formulations and pesticide applicators, low till and no till production systems, crop rotations and other management techniques are also contributing to lower production costs and expanded cotton production, despite three consecutive seasons with average prices of less than 60 cents per pound.

The strength of the U.S. dollar is encouraging increased production in those countries where currencies have depreciated. The U.S. dollar rose by about one-third against the Australian dollar in the past three years, by 90% against the Brazilian reais, by one-fourth against the currency of Francophone Africa, and by 500% against the Turkish lira. Thus, while cotton prices measured in U.S. cents per pound are among the lowest in 28 years, prices in the currencies of producers outside the USA are somewhat more attractive.

The development of new areas for cotton in Brazil and Turkey are contributing to the rise in world production. Production costs in Mato Grosso are estimated well below the world average, and production has climbed from 30,000 tons to 480,000 tons in Mato Grosso since the mid-1990s. The expansion of irrigation in East Turkey is well documented, and the GAP region now accounts for 430,000 tons of production, compared with 164,000 tons in 1994/95 when the Cotlook A Index averaged more than 90 cents per pound. Together, Mato Grosso and East Turkey are accounting for an additional 700,000 tons of world cotton production that is still expanding, even at current prices, and that did not exist in 1994/95.

Measures by governments to support farmers and domestic production during periods of economic stress are also affecting the world cotton supply. The Secretariat estimates that U.S. cotton production would be reduced by about one-fourth in the absence of the U.S. cotton program, and production in the EU would probably drop by three-fourths without the income support pro-

gram. China (Mainland) is also known to support domestic prices above market levels, and a withdrawal of subsidies would probably result in lower production. Mexico, Brazil, Egypt and Turkey also have modest programs that support cotton farmers. In total, measures by governments are boosting world production by an estimated two million tons over what would be produced at current prices in the absence of the measures.

One implication of rising world production is that a recovery in prices to average levels is not likely soon. Secretariat estimates of season averages of the Cotlook A Index are below 60 cents per pound over the next two seasons. Obviously, weather can change the outlook for prices from season to season. But rather than an underlying expectation that cotton prices will tend toward levels of 80 cents per pound, it now seems more likely that the average level of prices will be well below the average since 1973/74 of 73 cents per pound. Low prices will ultimately benefit consumers, and the rate of growth in world cotton consumption may move back toward 2% per year, as was common prior to the mid-1980s. However, continued low prices are obviously going to put additional pressures on producers, leading to less intensive input use, continued efforts to lower costs through technology and sharpening diplomatic conflicts over government measures.

Role of the ICAC

The mission of the ICAC is to assist governments in fostering a profitable and healthy world cotton industry. The Committee serves as a catalyst for cooperative action by governments and industry segments in the pursuit of broadly shared goals. The role of the ICAC is to raise awareness, disseminate information and to facilitate cooperative action. The theme of this 60th Plenary Meeting is "COTTON - An African Renaissance," an ambitious theme, given the current level of world prices. However, it is instructive to note that in Zimbabwe, and in other countries of East Africa, production is tending higher even now, despite low world prices, making it particularly appropriate that the Committee is meeting here this year. There are seven topics that will receive emphasis this week, and our broad objective is to expand understanding and cooperation in these areas: Government Measures, Demand Enhancement, Good Trade Practices, Improving Quality, Genetic Engineering in cotton, and Integrated Crop Management.

Government Measures

The subject of government measures in cotton has been discussed in the ICAC since the creation of the Committee in 1939. One concern is that these discussions have often been more contentious than constructive. It is my hope that by limiting calls for removal to those measures that directly distort production and trade, discussions

this year can be better focused and therefore more productive.

Reports by the Secretariat indicate that government measures have an impact on the structure of the world cotton economy. 55% of world cotton production benefited from direct income or price support programs in 2000/01, and cotton area in countries that provide direct subsidies to growers increased from 11 million hectares in 1998/99 to 11.7 million in 2000/01. In contrast, cotton area in countries that do not provide direct subsidies to growers declined from 22 million hectares in 1998/99 to 20 million in 2000/01.

The Standing Committee expressed concern about domestic policies that distort cotton prices and trade and has developed a resolution urging WTO negotiators to move forward with constructive proposals to reduce trade and production distorting policies. The Private Sector Advisory Panel echoed these sentiments during a round table discussion with the Standing Committee in June in Washington. The PSAP noted that governments seek to achieve many valid objectives through the use of measures affecting agriculture, and that it is not realistic to expect the immediate elimination of all forms of government measures. Therefore, the PSAP suggested that the ICAC focus its efforts on achieving a gradual but steady reduction in those government measures that directly subsidize increased cotton production.

The resolutions put forward by the Standing Committee are contained in Working Paper III that will be discussed during the Third Plenary Session. The objective of the session on government measures is to develop a unified position that countries can communicate to their WTO negotiators as a consensus on which the cotton industry can build.

In a related matter, Working Paper II contains a recommendation from the Standing Committee encouraging the adoption of good trade practices and urging governments to make valid arbitral awards enforceable under member country's laws. Adoption of this recommendation during the Second Meeting of the Steering Committee will help to bolster confidence in the cotton trading system and improve the efficiency of the world cotton market.

Cotton Quality

Improvements in cotton quality are a long-standing concern of the textile industry, and the decline in average prices is increasing the incentives for producers to enhance returns by earning quality premiums. The First Open Session will be on the subject of Improving Cotton Quality. One element in efforts to improve quality is the development of recommendations on cotton ginning. The Standing Committee authorized the creation of an expert panel on ginning methods in January. The efforts of the Expert Panel are

much appreciated. There will also be reports on methods to reduce contamination in cotton, the impact of genetic engineering on quality and the role of fiber testing in improving quality. The objective of the session is to identify policies and programs governments can adopt to best encourage improved cotton quality.

Demand Enhancement

Slow growth in demand for cotton must be a concern of all segments of the cotton industry. The subject of demand enhancement will be discussed on two levels during the Second Open Session. On one level, the Committee will hear of efforts by national cotton industry organizations to expand efforts to boost retail demand for cotton. On a second level, there will be a report on measures to boost mill use of cotton in Africa, and by implication in other developing countries.

The world cotton industry has a long history of unsustainable international efforts to promote increased consumption of cotton. While there has always been broad agreement in theory that promotion is necessary to the health of the world cotton industry, in practice there has been a lack of will to provide sufficient funds to sustain international efforts. Therefore, the Consortium for Cotton Promotion represents a different approach looking to build on the success of national programs. An objective of this year's session on demand enhancement is to empower additional cotton industry organizations to begin national campaigns of cotton promotion in their countries.

Mill use represents just half of production in Africa, and in many developing countries all production is exported. There are positive steps that governments and industries can take to foster an improved investment climate for textile industries, and these steps will be discussed in the session on demand enhancement.

Genetic Engineering and Integrated Crop Management

As noted earlier, genetic engineering and advances in other production technologies are contributing to lower production costs and expanded world production. But the new technologies are not evenly available to all producers, and some are not appropriate in all situations. As with any new technology, there is much to learn about the use of genetically engineered products. The Third and Fourth Open Sessions will be devoted to discussions of the new technologies and their impact on producers, particularly producers in Africa and other developing countries. The objectives of the sessions are to provide for widespread adoption of appropriate technologies and to evaluate whether the new technologies are well suited in all cases.

Work of the Secretariat

There have been many areas of accomplishment

by the Secretariat in the past year, and I want to acknowledge the efforts of members of the Secretariat to improve services to governments and the cotton industry and to expand the amount of information provided. The Secretariat provided daily, monthly and annual statistical reports on the world cotton situation that detailed ongoing changes in the world industry and likely trends over the next several years. The Secretariat produced significant reports on government measures, the demand for cotton, the structure of trade and the level of export commitments. There have also been technical reports on cotton research. The Secretariat has helped to organize regional technical meetings, and has assisted with preparations for the WCRC-3. The Secretariat coordinated the formation of the Expert Panel on Ginning Methods and helped to expedite the work of the Panel. The Secretariat has served as the International Commodity Body for Cotton before the Common Fund for Commodities. In partnership with Coordinating Agencies in Poland and Germany, the Secretariat expanded the range of information available on the ICAC web site and continued to make the site easier to use.

Plenary Meetings

The purpose of a plenary meeting is to meet and move forward through agreements to cooperate and improve. Meetings are also for the exchange of information regarding the outlook for cotton supply, use and prices, changes in government measures affecting the cotton industry and reports from countries and organizations. The Zimbabwe Organizing Committee has worked with the Secretariat and the Standing Committee to orient the agenda of this 60th Meeting to focus on matters of broad concern to producers and spinners in Africa, and by extension to bring attention to problems facing all segments of the world industry. It is a pleasure to be able to thank the Organizing Committee and the Government of Zimbabwe for their efforts in preparing for this meeting and for their hospitality. Zimbabwe has had great success in raising production, making it highly appropriate that we are meeting here this year.

I also wish to recognize the efforts already underway in Egypt and Poland to host the 61st and 62nd Plenary Meetings in 2002 and 2003. Egypt formed a host organization early in 2001 and has been actively preparing for next year. The Mina House Hotel beside the pyramids and sphinx in Cairo will serve as the conference facility. The Organizing Committee in Egypt includes representatives of all segments of the cotton industry, including many people who are very familiar with the ICAC and have long supported the work of the Committee. I look forward to traveling to Cairo next month to consult with the Organizing Committee and government officials on preparations for next year. Likewise, preparations are already well advanced in Po-

land to host the meeting in September 2003. A theme and conference venue are being identified, and the government and cotton industry of Poland will ensure that the meeting is highly successful.

New Members

I want to welcome delegates from non-member countries who are participating as observers. All participants in ICAC plenary meetings are fully welcome, and I hope you will consider joining the Committee. Membership in the ICAC is of value to all countries that produce, consume or trade cotton. Membership provides tangible benefits in the form of increased access to statistics and technical information provided by the Secretariat. Membership in the ICAC can lead to increased funding for cotton research through the Common Fund for Commodities. And, most importantly, membership in the ICAC provides the avenue for each cotton industry, including cotton textile industries, to join fully into the fraternity of cotton countries in discussions of cotton issues of international scope and significance.

ICAC Institutions

I want to acknowledge the work of the Standing Committee this past year. The Standing Committee monitored the development of the business plan and for the first time approved the use of business plan revenue for additional services. The Standing Committee approved the conditions for creation of an Expert Panel on Ginning Methods, shaped the priorities reflected in the agenda of this plenary meeting, passed resolutions on government measures and good trading practices, and dealt with matters of budget and management. Each subject was handled with discretion and expertise. The four institutions of the ICAC, the Advisory Committee, the Standing Committee, the Private Sector Advisory Panel and the Secretariat, are working well together. The Standing Committee, and its officers this past year, Mr. Blum, Mr. Liévano, and Mr. Malhotra, deserves much credit for their work. I also want to thank Mr. Stanley Anthony who serves as Chair of the Expert Panel on Ginning, and Mr. Fritz Grobien, who serves as Chair of the Private Sector Advisory Panel. The Expert Panel and the PSAP have contributed much to the work of the ICAC this year. Let me also acknowledge the work of the Common Fund for Commodities in support of the cotton industry. The Common Fund has approved a total of nine cotton projects involving over \$20 million in grants and loans. A marketing project is underway here in East Africa, and a newest cotton project on price risk management will be inaugurated this week. The work of the CFC under Managing Director Rolf Boehnke is much appreciated.

I thank member countries for the privilege of serving as executive director, and I look forward to a successful 60th Plenary Meeting.

First Plenary Session

10:45 AM, Monday September 17, 2001
Mr. Paddy Zhanda in the Chair

The CHAIR called the meeting to order and introduced Mr. Washington Matsaira, Chief Executive Officer of Standard Chartered Bank Zimbabwe Limited, to present a paper on the world economic outlook. Mr. Matsaira said that since late last year the world economy has been slowing and that the next 12 to 18 months will be very difficult for the majority of African economies, as the continent feels the effects of a reduction in output growth and a decline in investment and trade flows. He also said that as a result of the events of the previous week in the United States, the global downturn will likely last longer than previously anticipated. He mentioned that the economies of Nigeria and South Africa, which together account for over 40% of regional output, continue to under-perform and that despite the April-2001 forecast of the IMF, which suggested that sub-Saharan expansion would be 3.9% in 2001, the region was now expected to expand by 3% this year and by a lower rate in 2002. In addition to the global slowdown, economic performance in Africa is being affected by a sharp fall in commodity prices and a 20% decline in foreign direct investment. With regard to the oil price boom, Mr. Matsaira said that energy is a top export product in sub-Saharan Africa but that most of the African economies are net importers and with high fuel prices and weak export prices, several African countries are feeling a negative impact. He mentioned that because of low foreign direct investment into the region, countries are competing for resources by introducing friendly tax regimes. He said that obtaining foreign resources mainly depended on economic policies that promote local savings and investment as well as development of financial sector programs. He added that finance must play the main role to achieve the African renaissance in the years ahead and that ultimately investment has to be home grown. Finally, Mr. Matsaira said that Standard Chartered Bank has been close to agriculture in several countries in the region, transferring funds from urban to rural areas and that the bank played an important role supporting the economic development of the region. Mr. Matsaira's presentation is a statement of the meeting.

The CHAIR thanked Mr. Matsaira for his presentation and introduced Mr. Gérald Estur, statistician of the Secretariat, to present the world outlook for cotton. Mr. Estur said that world cotton supply is expected to increase by 1.1 million tons to reach a record level of 29.5 million tons in 2001/02, while demand is anticipated to increase by only 200,000 tons. He noted that international cotton prices collapsed from 66 cents per pound in December 2000 to 41.50 cents per pound in September 2001, despite the fact

that world ending stocks declined for the third consecutive season to a six-year low of 8.6 million tons in 2000/01. Production in the Northern Hemisphere is expected to rise by 10% or 1.7 million tons. The three biggest producing countries, China (Mainland), the USA and India, will account for most of the increase in world production in 2001/02 with a combined increase of 1.5 million tons. Low cotton prices combined with more attractive soybean prices will likely reduce Southern Hemisphere cotton area in 2001/02. Overall world production in 2001/02 is estimated at 20.85 million tons, 1.5 million tons, or 8%, more than last season and above the previous peak of 20.7 million tons recorded in 1991/92. Most of the increase in production will occur in the high-medium and medium categories. The world economy is decelerating in 2001 and world textile fiber consumption at the end-use level will increase by 2% in 2001/02. Mill consumption is forecast to increase by 1% to reach a record of 19.9 million tons in 2001/02. U.S. cotton mill use will continue dropping. In spite of official prices for existing stocks, which are above international prices, the stock-reduction policy by China (Mainland)'s government is likely to remain in effect in 2001/02. China (Mainland) is now expected to import 150,000 tons and to maintain exports of around 100,000 tons. World cotton exports are now forecast to increase by 200,000 tons, to 5.9 million tons in 2001/02, 28% of projected world production. The USA will take the lion's share of the increase, with 31% of world exports, up from 25% last season. World cotton imports as a share of world consumption are estimated at 30% in 2001/02, one percentage point higher than last season. World production is expected to exceed consumption by 900,000 tons and world-ending stocks are forecast to increase accordingly. The burden of ending stocks will continue shifting from China (Mainland) to other countries, mainly to the USA. Ending stocks out of China (Mainland) will increase by 1.1 million tons, to 7.5 million tons, bringing the stocks-to-use ratio to 51%, up from 43% last season. International cotton prices will remain in 2001/02 below the long-term average for the fourth consecutive season. Supply and demand estimates suggest that the Cotlook A Index will average 47 cents per pound in 2001/02, ten cents, or 20%, lower than in 2000/01, and the lowest since 1972/73. In the short-term, the downward pressure on prices is likely to intensify with the arrival of the crop to the market. In the longer term, cotton consumption will be stimulated by the historically low prices, which have already improved significantly the profitability of the spinning sector and the competitiveness of cotton. However, if the economic slump affecting the world's biggest economies were to worsen into a recession, cotton consumption would certainly

suffer. The *Outlook for Cotton Supply in 2001/02* is a document of the meeting.

The CHAIR opened the floor for comments. There being no questions, the CHAIR thanked the speaker for his presentation and invited delegates from member countries to provide statements.

The delegate of BELGIUM, speaking on behalf of the EUROPEAN UNION, congratulated the Organizing Committee and thanked the people of Zimbabwe for their hospitality. He underlined that the EU is not a very important producer of cotton but is a major producer and exporter of textile products. That is the reason why the EU appreciates the role of ICAC. He mentioned that cotton production in the EU was 1.573 million tons of seedcotton and is expected to decline to 1.41 million tons this season. He noted that production accounts for 40% of the cotton mill consumption in the EU, which is the second largest importer in the world. He explained that ginners receive payments from the EU, which are reduced when national production quotas are exceeded. As a result, the expansion of cotton cultivation is now restricted. The European Union's remarks and country report are statements of the meeting.

On behalf of all delegations, the delegate of BRAZIL thanked the government of Zimbabwe and the organizers of the meeting and expressed his compassion to the people of the United States.

The delegate of SOUTH AFRICA thanked the government of Zimbabwe and the meeting organizers. He also expressed his deepest sympathy to the United States. He stated that the African renaissance of cotton depends on three basic principles: the application of free market principles, increasing productivity throughout the cotton pipeline, and marketing and promotion. He indicated that the level of subsidies in South Africa is very low relative to the OECD average, but 55% of world cotton production benefits from direct income or price support programs, threatening production in Africa. He indicated that 50% of area next season would be planted to GE varieties. Finally, he congratulated the Chairperson and the members of the Standing Committee as well as the executive director for their excellent work since the last meeting. South Africa's remarks and country report are statements of the meeting.

The delegate of PARAGUAY congratulated the organizers of the meeting and thanked the government and the people of Zimbabwe for their hospitality. He indicated that planting intentions for the 2001/02 season are dramatically lower as a result of depressed prices. He said that Paraguay cannot afford to subsidize its cotton production and is suffering from the consequences of government measures in other countries that

distort trade. He pointed out that Paraguay has successfully expanded its exports of cotton all over the world, thanks to the improvement of the quality of its production and will continue to export despite its reduced output. The delegate of Paraguay's remarks are a statement of the meeting.

The delegate of INDIA thanked the government of Zimbabwe and the Organizing Committee and presented his condolences to the people of the United States. He explained the vital importance of the cotton sector for the Indian economy. He mentioned that India has the distinction of growing all the four varieties of cultivated cotton species and of having the largest cotton area in the world. He noted that production and consumption declined in 2000/01 and that the prices of seedcotton as well as of lint were higher than during the previous season. Imports and exports of cotton are now free. He indicated that the government of India has taken several initiatives for improving quality, productivity and production of cotton in a joint venture between government agencies, the industry and growers. India's country report is a statement of the meeting.

The delegate of EGYPT expressed his thanks to Zimbabwe's government and people for hosting this meeting and to the Secretariat for the excellent preparations. He emphasized that the liberalization of the cotton sector started in 1994 has achieved fruitful results. In particular, the quality of cotton has improved and contamina-

tion has been reduced. The number of traders has increased and exports have reached an average of 100,000 tons annually to more than 40 countries by 26 exporting companies. He expressed the delight of the Egyptian people and government that the next plenary meeting will be held in Egypt. Egypt's country report is a statement of the meeting.

The delegate of GREECE thanked the host government and expressed compassion for the tragedy in the USA. He mentioned that cotton production is expected to be about 1.1 million tons of seedcotton this season, down from 1.235 million tons last season. He explained that the decline is partly due to low prices but chiefly due to the restrictive policy recently adopted by the EU, reducing aid when production exceeds the national guaranteed quota. Because of the drop in prices in 2001, exports have been difficult and ending stocks have increased. However, yield and quality are expected to be better in 2001/02 than last season. Greece's country report is a statement of the meeting.

The delegate of UGANDA extended her thanks and gratitude to the government of Zimbabwe and the Organizing Committee for the excellent arrangement for this plenary meeting despite the difficulties. She also joined the rest of the world in extending her sympathy to the U.S. government and people. She underlined that the rehabilitation stage is now concentrating on increasing productivity and improving quality. She

mentioned that production declined by 12% this season because of low prices. The delegate of UGANDA invited all willing investors in the textile and garment manufacturing to invest in Uganda where all possible incentives will be given by the government. Uganda's country report is a statement of the meeting.

The delegate of BRAZIL indicated that their country statement would be provided later. He congratulated the Secretariat for its report on the outlook for supply and demand, which is clearly showing that the dismal situation is created by man-made distortions to the free market. Brazil's country report is a statement of the meeting.

The delegate of AUSTRALIA joined other delegations in expressing his thanks to the government of Zimbabwe for hosting the meeting and to the organizers for their hard work. He mentioned that Australian cotton production reached a new record of 775,000 tons in 2000/01 and that 735,000 tons were forecast for the coming season. He underlined that the Commonwealth Government assists the cotton sector through its contribution to research and development in partnership with the Australian industry. He mentioned the initiatives taken by the government to support the Australian textile, clothing and footwear industries in order to advance their international competitiveness. Australia's country report is a statement of the meeting.

The CHAIR adjourned the session at noon.

Second Plenary Session

2:00 PM, Monday September 17, 2001

Mr. Guy M. Menage in the Chair

The CHAIR opened the Second Plenary Session and invited delegates to provide statements.

The delegate of the UNITED KINGDOM echoed all other delegates' words of congratulations in staging this plenary meeting in difficult circumstances but a wonderful setting. He mentioned that the United Kingdom's main connections with the international cotton industry are in fields other than production and processing of fiber. Cotton trading retains a strong base in the UK, and the provision of trading rules and arbitration gives to the LCA an important role in the global cotton industry. The UK also retains an important role in information services, education and research from which the cotton industry benefits. The United Kingdom's country report is a statement of the meeting.

The delegate of ZIMBABWE extended her welcome to the delegations of all countries and said that her country is honored to host the 60th Plenary Meeting expressing the hope that delegates and observers will be enjoying their stay in

Victoria Falls. To revitalize its economy, Zimbabwe aims at increasing exports, and the cotton industry will play a critical role in this regard. The current land reform program has not affected cotton production as the bulk of producers are small-scale farmers, but the depressed international prices have limited the increase in area. Due to unfavorable weather conditions production declined by 6.5% in 2000/01. Zimbabwe's country report is a statement of the meeting.

The delegate of IRAN thanked the government of Zimbabwe for its hospitality and congratulated the Organizing Committee and the Secretariat of ICAC for the excellent organization. He said that the total cotton area in Iran declined by 21%, down to 205,000 hectares in 2001/02 because of a shortage of water, high cost of production, unsuitable marketing conditions and low international prices. The Iranian textile industry consumed 110,000 tons. Iran's country report is a statement of the meeting.

The delegate of SUDAN offered his gratitude to the government and the people of Zimbabwe for their hospitality and the warm welcome received.

He said that the Sudanese government is implementing a rehabilitation plan for irrigation and ginning infrastructure as well as spinning and weaving mills. All taxes on cotton have been abolished and commercial banks are encouraged to increase financing of the cotton sector under more favorable terms. Production increased from 52,000 tons to 74,000 tons in 2000/01 but is expected to decline this season because farmers shifted from cotton to grains. He mentioned that the research project on stickiness sponsored by the CFC and the ICAC has just terminated. He thanked and congratulated the Organizing Committee and the Secretariat for the excellent preparations for the meeting. Sudan's country report is a statement of the meeting.

The delegate of TURKEY expressed his thanks and congratulations to the government of Zimbabwe and the members of the Organizing Committee who made this meeting possible despite difficult conditions. He thanked the chairman of the Standing Committee and the executive director for their efforts and contributions. He regretted the absence of the chairman of the Standing Committee and expressed his sympathy.

thy with the feelings of the U.S. people. He mentioned that cotton production in Turkey reached 880,000 tons last season and was expected to climb to a new record of 900,000 tons this season. He noted that Turkey would nevertheless continue to import cotton. Turkey's country report is a statement of the meeting.

The delegate of CHINA (TAIWAN) thanked the Organizing Committee for its hospitality. He underlined that the spinning industry was facing serious difficulties because of a shortage of labor, high wages, high cost of land and low import duties, enabling cheap imports of yarn to flood the Taiwanese market. In response to low demand, domestic cotton spinners have moved production overseas, shifted to other businesses or raised the added value of their products to remain competitive. The industry remains totally dependent on imported raw cotton, particularly from the USA. The total number of spindles fell from 4.5 million in 1993 to 2.5 million in 2001, and the utilization rate dropped to 85%. China (Taiwan)'s country report is a statement of the meeting.

The CHAIR invited delegates of non-member countries to present their statements.

The delegate of ANGOLA thanked the ICAC Secretariat for having invited his country to this important meeting. He thanked the government of Zimbabwe and the Organizing Committee for their warm welcome and the excellent preparation of the meeting. He said that cotton production in Angola has dropped dramatically since 1975 because of political instability and a lack of financial resources. The country is in the process of rehabilitating the cotton sector through involvement in ICAC, promotion of cotton cultivation wherever it is possible and safe and rehabilitation of cotton marketing, processing and storage facilities. He announced that the government of Angola is taking steps to become a member of the ICAC in the near future. Angola's remarks and country report are statements of the meeting.

The delegate of ZAMBIA said that the Ministry of Agriculture of Zambia was taking measures to acquire full membership in the ICAC before the 61st Plenary Meeting. He noted that the potential for cotton production in Zambia is largely untapped. The cotton sector in Zambia has been liberalized since 1994 and production has fluctuated between 65,000 and 100,000 tons of seedcotton, while the country has a ginning capacity of 150,000 tons. He thanked the government of Zimbabwe and the ICAC for organizing this meeting and expressed his trust that Zambia will benefit from integration in the international cotton community. Zambia's remarks and country report are statements of the meeting.

The CHAIR noted that no additional delegation wished to speak. The session was adjourned at 3:45 pm.

10:30 AM, Tuesday September 18, 2001
Mr. W. G. Mashingaidze in the Chair

The CHAIR introduced Mr. Alfonso Liévano, First Vice Chair of the Standing Committee. Mr. Liévano noted that he was presenting the report of Mr. Lawrence Blum, Chair of the Standing Committee. Mr. Blum was unable to attend the plenary meeting. In his report, the Chairman of the Standing Committee extended his thanks and congratulations to the government of Zimbabwe and the organizers of the conference. He said that the theme of this conference, "Cotton: An African Renaissance," captures the rapid development of the Zimbabwe cotton industry that in six short years has transformed itself from a state-controlled sector to what it is today, a free enterprise industry looking optimistically to the future.

In his report, the Chairman of the Standing Committee focused upon the changing role of the Standing Committee. He said that today, the role of the Standing Committee includes that of encouraging and helping the Secretariat to serve as a catalyst for cooperative endeavors by governments and the private sector. Increasingly, he wrote, your Standing Committee is functioning as a vehicle for turning member country interests and their cotton industry interests into ICAC initiatives. However, he assured that the Standing Committee continues to serve its traditional functions of administrative and financial oversight of the Secretariat, and he said the Secretariat continues to receive high marks for its performance in these areas. The report paid special thanks to Mr. Liévano and Mr. Malhotra, First and Second Vice Chairs respectively of the Standing Committee for their good work in chairing subcommittees that expedited and focused the work of the Standing Committee.

The Chairman of the Standing Committee said that the Secretariat was working to improve the information provided to the Committee and cited the cooperative effort with the FAO to publish the World Textile Fiber Consumption Survey as an example. He noted that the resources for this initiative are coming from revenue earned under the Secretariat's business plan.

The Chairman of the Standing Committee said that the Private Sector Advisory Panel, working through the Standing Committee, has helped focus ICAC attention on the need for risk management education; the development of a business plan to explore revenue opportunities, especially through the provision of information services as well as private sector involvement at plenary meetings; the form and structure of plenary meetings; the formation and report of an expert panel on biotechnology; and the distribution of information on the need for good trading practices. He offered a special thanks to the members of the Private Sector Advisory Panel.

The Chairman's report drew attention to the formation of the Consortium for Cotton Promotion,

a program focused upon national programs to increase cotton consumption. The report said that the Consortium is an example of the Secretariat's role as a catalyst for cooperative endeavors by governments and the private sector.

The Chairman of the Standing Committee closed by thanking delegates and observers for their participation. He urged countries to send their Standing Committee delegates from Washington to plenary meetings. He noted that the Standing Committee had recommended Mr. Alfonso Liévano of Colombia for the post of Chair, Mr. Ajai Malhotra of India as the First Vice Chair, and Ms. Chigozie Obi-Nnadozie of Nigeria as Second Vice Chair for 2001-2002, and he said that he fully supported their nominations.

The CHAIR thanked Mr. Liévano for delivering the report of the Chair of the Standing Committee.

[The Report of the Chairman of the Standing Committee is included in the attachments of the Inauguration session.]

The CHAIR invited delegates of member and non-member countries as well as of international organizations to present statements.

The delegate of SOUTH AFRICA thanked the Chairman of the Standing Committee for the constructive work done during the last year. He also thanked the executive director and his staff for their efficient dealing with the diverse needs of the member countries. He emphasized the considerable progress made by the ICAC during the last years to meet the changing needs of the cotton industry. He said that we should follow the statement of Schumpeter, "creatively destroy" the business organization.

The delegate of CHINA (TAIWAN) introduced Dr. S. F. Chiu from the China Textile Institute to present a report on his research project, which is supported by the government of China (Taiwan). The research is concerned with the quality aspects of yarn production. The complete text of his presentation about the application of computer control systems on novel-cotton-yarn manufacturing is a statement of the meeting.

The CHAIR thanked the speaker for his presentation.

The delegate of POLAND thanked the Organizing Committee, the ICAC and the government of Zimbabwe. He expressed his sympathy and compassion to all Americans. He explained that the Polish cotton sector has been influenced by the strength of the national currency and mentioned that cotton consumption will remain at last year's level of 62,000 tons. He noted that the share of imports from Central Asia is declining in favor of cotton from Syria and the African Franc Zone. The cotton sector is being rapidly privatized in a completely free market. The Gdynia Cotton Association actively defends the principle of sanctity of contracts and supports strongly the Consortium for Cotton Pro-

motion. He indicated that preparation has started for the organization of the 62th Plenary Meeting in Poland in September 2003. Poland's statement on good trade practices and country report are statements of the meeting.

The delegate of COLOMBIA expressed his thanks for the magnificent organization of the meeting in a beautiful country. He emphasized that Colombian cotton farmers have fully played the good game of open trade but that their efforts are threatened by market distortions on an uneven playing field. Unfair competition in international trade has dramatically increased rural unemployment and poverty of the rural population in developing countries. Better market access in a world free of trade-distorting practices is essential for promoting development and reducing poverty in developing countries. His presentation is a statement of the meeting.

The delegate of TOGO thanked the ICAC for its decision to admit his country as a member during the 58th Plenary Meeting. He extended his thanks to the Standing Committee, the Secretariat, the government of Zimbabwe, and congratulated the Organizing Committee for its outstanding work. He underlined that seedcotton production in Togo climbed from 24,000 tons in 1980/81 to 188,000 tons in 1998/99. Production declined in the following two seasons because of low prices coupled with adverse weather conditions. However, a revival plan is now in effect and seedcotton production is expected to reach 200,000 tons in the short term, he said. He mentioned the excellent reputation of the quality of the Togolese cotton on the world market. Togo's remarks and country report are statements of the meeting.

Dr. Jean-Philippe Deguine, representative of CIRAD-CA, gratefully acknowledged the Organizing Committee and the government of Zimbabwe for their very warm welcome and for the excellent organization of the meeting. He explained that CIRAD's cooperation activities in the field of agricultural research cover more than 90 countries in the tropical and sub-tropical regions of the world. CIRAD has more than 50 years experience in cotton research throughout the world. CIRAD plays an active role in many regional, thematic and global research networks. The most recent one is the ICGI (International Cotton Genome Initiative); he proposed that a workshop be held during the World Cotton Research Conference-3 in Cape Town in 2003. His presentation is a statement of the meeting.

Mr. Laurie Kitch, who represented FAO, expressed his gratitude to ICAC, the government of Zimbabwe, the Organizing Committee and the numerous sponsors who made this meeting possible. He said that FAO and ICAC have a long history of working together on a broad range of issues related to the promotion of the cotton sector. He said that under its mandate, FAO provides development assistance, information on all aspects of agriculture, advice to governments, and a neutral forum where nations can meet to approve international standards, conventions and agreements. He indicated several Web sites of key importance for this conference and described FAO's activities impacting on the cotton sector in Africa. His presentation is a statement of the meeting.

The delegate of COTE D'IVOIRE informed participants that his delegation was comprised of five members demonstrating the interest of his

government in this meeting but, unfortunately, travel problems delayed the arrival of the other four delegates. He thanked the executive director for renewing the invitation to attend the plenary meeting and expressed his gratitude to the Organizing Committee and to the government of Zimbabwe for their warm welcome. He indicated that the theme of this meeting is particularly appropriate for Côte d'Ivoire, since a fundamental reform of the cotton sector started in 1998. He reported that cotton production increased from 114,000 tons of lint in 1996/97 to a record of 173,000 tons in 1999/00. Production dropped in 2000/01 to 122,000 tons but is expected to rebound by 15% this season, he said. Anticipating the complete liberalization of the cotton sector in 2002, the seven segments of the industry have created a national cotton council, he said. Côte d'Ivoire's remarks and country report are statements of the meeting.

As no other delegation wished to make a statement, the CHAIR gave the floor to the delegate of Colombia to complete his presentation. The delegate of COLOMBIA called on the ICAC to make a recommendation to the WTO addressing the pressing need to remove all measures that distort international trade and production of cotton, such as high protection levels, export subsidies and distorting domestic support.

Seeing no other requests for intervention, the CHAIR adjourned the session at noon.

[The Secretariat received a statement from the delegation of Nigeria, and country reports from the delegations of Korea, the Philippines and Tanzania. Although absent, Germany, Israel, the United States and Uzbekistan supplied country reports.]

Third Plenary Session

2:00 PM, Tuesday September 18, 2001
Mrs. Nancy Zitsanza in the Chair

The CHAIR called the meeting to order and said that a report by the Secretariat on government measures affecting cotton had been distributed to delegates. The CHAIR said that the report indicates that 55% of world cotton production benefited in 2000/01 from direct income or price support programs and, that out of US\$3.6 billion provided worldwide, 54% was given to farmers in China (Mainland), 41% to farmers in three industrial countries and 5% in four developing countries. The United States and China (Mainland) continue to be the only two countries that offer export subsidies. The CHAIR mentioned that due to the very low level of prices over the last three years, area dedicated to cotton in countries that do not subsidize cotton declined from 22 million hectares in 1998/99 to 20 million in 2000/01, while area in countries

that subsidize cotton increased from 11 million hectares to 11.7 million during the same period. Low prices have bankrupt many producers in developing countries and threaten to increase unemployment as dispossessed cotton growers migrate to the cities. Finally, the CHAIR noted that the report suggests that a removal of subsidies would result in lower production and higher prices in the short term but that in the long term production would shift to non-subsidizing countries leaving long-term average prices virtually unchanged. The Secretariat estimates that a removal of subsidies worldwide would have had a net effect of 17 cents per pound on average cotton prices in 2000/01. The report titled *Production and Trade Policies Affecting the Cotton Industry* is a document of the meeting.

The CHAIR introduced Mr. Carlos Valderrama, Senior Economist of the Secretariat, to summarize on behalf of the WTO a paper prepared for

the meeting. Mr. Valderrama said that the paper by the WTO covers the Agreement on Textiles and Clothing (ATC) and the Agreement on Agriculture (AA). In regard to the ATC, the WTO states that the central element is the transitional process for the integration of textiles and clothing into WTO rules and disciplines, that one-third of all textile and clothing products have been integrated into the WTO rules and a further 18% of products will be integrated at the beginning of the third stage on 1 January 2002. Another element is the increase in the annual quota growth rate, which in the first two stages increased by a compound 45% and will increase by a further 27% in the third stage. The final step on 31 December 2004 will be the integration of all remaining products and the removal of all bilateral quotas. The paper states that the integration of products by developed countries has included the least sensitive products not subject to quota. Regarding the AA, the WTO pa-

per notes that member governments of the WTO made a commitment to improve market access and reduce domestic support and export subsidies in agriculture over a period of six years for developed countries and ten years for developing countries. In relation to market access, the agreement stipulates that tariffs should become the only border protection and requires that all non-tariff measures be converted into tariff equivalents. Tariffs are being reduced over the respective periods by an average 36%, with a minimum 15% reduction for each product in developed countries, and by an average 24%, with a minimum of 10% for each product, for developing countries. Least developed countries are not required to reduce tariffs. In relation to domestic support, the WTO indicates that non-distorting subsidies with legitimate policy objectives such as food security and regional and environmental objectives had to be separated into a "Green Box," exempt categories with special treatment for developing countries placed into a "Special and Differentiated Box," direct payments under production-limiting programs under a "Blue Box," and all other subsidies subject to reduction commitments under an "Amber Box." A Total Aggregate Measure of Support is to be reduced in equal installments by 20% in developed countries and by 13% in developing countries over the respective periods. In relation to export subsidies, the WTO paper notes that article XVI of GATT prohibited export subsidies and gave an exemption for primary products that did not provide more than an equitable share of the world export trade to a WTO member country. Using Article 20 as a basis, member governments of the WTO are negotiating the terms for continuation of the reform, which will include further reductions in tariffs; a reduction or elimination of the Amber and Blue boxes; abolition of export subsidies; and tightening of the rules preventing circumvention. Other important aspects to be negotiated include an agreement on disciplines on agricultural export credits. Finally, Mr. Valderrama said that the WTO paper noted that trade now has been rid of a plethora of barriers, making agricultural trade more predictable and guaranteeing that foreign markets will remain open for business in the future. The WTO's paper is a statement of the meeting.

The CHAIR asked the Secretary General to present Working Paper III, "Government Measures and the World Cotton Industry," which is included in the attachments of the Second Meeting of the Steering Committee. The SECRETARY GENERAL presented the paper and noted that it contained two alternative proposals for resolutions to be discussed by member governments.

The CHAIR opened the floor for discussion and recognized the delegate of COLOMBIA who said that regarding the issue of government subsidies, in a recent publication by the World Bank,

the president of that institution had stated that "rich countries must open their markets and reduce their agricultural subsidies." The delegate asked the Secretariat to distribute the publication to all delegations.

The delegate of GREECE said that any remarks or publications from outside the plenary meeting should not be distributed to delegates.

The delegate of COLOMBIA replied that since the subject of the session was on subsidies it was appropriate to have the views of the World Bank, but that he would not insist that the World Bank press release be distributed.

The delegate of PARAGUAY asked if the intention was to vote for either one of the proposals. The SECRETARY GENERAL replied that the purpose was to find a consensus for a resolution on the issue.

The delegate of BRAZIL said that the subject of subsidies was of high importance for the government of Brazil and for the survival of the cotton industry in his country and that no bland statement should come out of this plenary meeting. The delegate said that the government of Brazil supported option 2 of Working Paper III.

The delegate of INDIA observed that the topic had been discussed in previous plenary meetings and that Working Paper III correctly stated that subsidies result in lower world cotton prices and that the burden of low prices falls heavily on developing countries, an event that is not in the interest of the world cotton economy. The delegate said that the plenary meeting should try to reach a consensus without resorting strictly to either proposal, but adopting a statement, which reflects the views of member governments.

The delegate of SUDAN supported option 2 of the working paper.

The delegate of GREECE said that subsidies in his country were given to farmers for social aspects and existing structural impediments, and in order to allow them to live in a high-income country. The delegate presented an alternative wording to proposal 1, to replace the phrase "to the extent possible" with the phrase "taking into account the social aspects as well as the existing structural impediments and weaknesses."

The delegate of PARAGUAY expressed sympathy and respect for the remarks of the delegate of Greece, but he said that subsidies in industrial countries are creating bigger problems in countries like Paraguay where 25% of the population earns a livelihood from cotton. He said that it was not possible to continue to look at isolated exceptional situations, as the issue was a matter of principle, free trade and human rights. The delegate supported proposal 2, suggested by Brazil, Chad, Egypt and Nigeria.

The delegate of AUSTRALIA supported option 2 and the statement of the Brazilian delegation

regarding a stronger set of words. However, the delegate said, the first set of words was agreed to by the USA and Spain. The delegate strongly believed that it was not appropriate in the absence of both countries to impose stronger resolutions not previously agreed to. He proposed to either agree to option 1 or to postpone any decision until the USA and Spain were present. He noted that the recent tragedy prevented delegates from Washington from traveling at this time.

The delegate of ZIMBABWE said that his delegation felt that distortions to trade should be reduced and eventually eliminated and supported the view of Brazil regarding option 2.

The delegate of SOUTH AFRICA said that all measures that intervene and prevent the efficient functioning of the market cause distortions, harming all countries in the short and long term and that singling out only exporting countries does not promote the principle of eliminating all subsidies. The delegate said that South Africa was vehemently opposed to government intervention, but believed that a decision in the absence of the USA and Spain would create more harm than good. He said it was necessary to reach a consensus decision where all members could participate. He said that his delegation was also impatient and would like to take action now but that democratic rules were not only about governing efficiently but governing well, and thus there was a need to have all member countries participate. He stated that if South Africa had to vote it would vote for proposal 1 without the words "to the extent possible." The delegate suggested to form a working group to formulate and distribute ahead of time a proposal and plan of action for a decision to be taken at the next plenary meeting in Egypt.

The delegate of SOUTH AFRICA also recommended that the third sentence in the first set of recommendations be amended to include the phrase "to the extent possible," after the word "reduce."

The delegate of BRAZIL said that in his opinion it was not the intention of the Standing Committee in Working Paper III to discuss the wording, but to choose between the two proposals. He disagreed with the comments of the Australian delegation, that it was not appropriate to decide the matter at that time.

The delegate of ITALY stated that cotton-producing countries in the European Union should find other products, such as ecological products, that can compete in a free market and expressed support for proposal 2.

The delegate of GREECE said that he did not mean to say that his country was the only country having social problems and structural impediments and stated again that a Greek grower could not survive without subsidies in a high-income country. He also said that in Greece growers would not be able to replace the area

currently dedicated to cotton with ecological products. He was of the opinion that subsidies are not disrupting the market and supported the proposal of Australia to postpone the discussion.

The delegate of SOUTH AFRICA asked about the intention of Working Paper III. The SECRETARY GENERAL replied that the tradition of ICAC was to discuss a subject and come to an understanding by consensus.

The delegate of PARAGUAY expressed his opposition to postpone a decision. He said that if a plenary meeting could not make a decision without a member country present, what was the reason to come to Zimbabwe. He wondered what would the plenary do if, for instance, Paraguay or Nigeria would be absent.

The delegate of SUDAN mentioned that delegations have worked on the subject of subsidies for over two years and all continue to have the same different opinions. The delegate said that the decision should not be postponed.

The delegate of BELGIUM proposed to delegate the decision regarding Working Paper III back to the Standing Committee or leave the subject to the Drafting Committee. He added that he was not in a position to join a consensus in the second proposal.

The delegate of GREECE said that his delegation felt isolated without the participation of other countries that support the position of his country. He mentioned that subsidies in his country are provided by the European Union and there was no delegate from the EU to explain the position of all EU member countries. He also mentioned that some delegates were representing the private sector and not governments and in fact some were members of the PSAP.

[The Secretary General provided a clarification after the session. He reported that all delegates to the 60th Plenary Meeting were properly credentialed by their governments. Because of the nature of the ICAC as an International Commodity Body, many governments often designate representatives from the private sector to serve as delegates and heads of delegations to plenary meetings.]

The CHAIR observed that there did not seem to be consensus to adopt the second set of resolutions.

The delegate of SUDAN disagreed with the proposal to forward the discussion to the Drafting Committee. He said that there seemed to be a

difference of opinion, therefore, delegates should vote on the issue before it went to the Drafting Committee.

The delegate of PARAGUAY said that he was against deferring the resolution, as there was nothing in the Rules and Regulations to prevent a vote on the subject.

The delegate of BRAZIL asked the Chair for a vote on the subject.

The delegate of GREECE said that it was not possible to know if the USA and Spain would have voted for one proposal or the other or for a different wording and, thus, the matter should not be voted upon.

The delegate of the UNITED KINGDOM noted that there were clearly strong views on the subject and that not all ICAC member countries were represented at the meeting. He also noted that both the PSAP and the Standing Committee recommendations were not unanimous and that as the Secretary General had suggested, ICAC managed to be successful because it operated on a consensus basis. He said that unless member countries could agree to adopt the first version of the resolution, the matter should be referred back to the Standing Committee or to a working group.

The delegate of COLOMBIA said his delegation was of the opinion that there should be a decision about the resolution and in addition a panel should be formed to design a specific timetable for eventual elimination of subsidies, so that the issue could be finally resolved. He mentioned that with distorted markets, Colombia could not compete in international markets and that unemployed cotton growers would be forced to produce illegal crops. He said that the idea of income differentials did not preclude action on the principal of a free market. He added that Colombia had enforced this principle even at the expense of losing its share of the world coffee market to lower-income countries in Asia.

The delegate of SOUTH AFRICA said that every delegation was aware of the fact that his country was against subsidies, but that in his opinion if a vote was taken, justice would not be done.

The delegate of BELGIUM asked what would be the effect of a vote regarding the strength of the resolution.

The delegate of AUSTRALIA supported the position of South Africa.

The CHAIR summarized the options at hand and suggested to continue the discussion on Thursday at 2:30 PM. There being no objections, the CHAIR adjourned the session.

2:30 PM, Thursday September 20, 2001
Mr. Michael Davies in the Chair

The CHAIR called the meeting to order and introduced Mr. Nabil Abdel El-Marsafawy, Chairman of the Trade Holding Company of Egypt, to invite delegates to the 61st Plenary Meeting. Mr. El-Marsafawy extended his appreciation to the government of Zimbabwe and the cotton organizations in the country for the excellent organization of the 60th Plenary Meeting. He invited delegates to the 61st Plenary Meeting to be held in Cairo in October 2002. He said that his country had a clear understanding of the mission and objectives of the conference and that they had designed a creative plan of action. He said Egypt was looking forward to welcoming delegates to Egypt, the cradle of civilization, and presented a welcoming video. Egypt's invitation is a statement of the meeting.

The CHAIR thanked Mr. El-Marsafawy for the invitation and resumed the session. He noted that it was clear a consensus had not been achieved on the subject of government measures and asked the Secretary General to read a wording of the resolution that included all suggestions. The SECRETARY GENERAL read the new version of a resolution on government measures.

The CHAIR asked delegates for comments and recognized the delegate of AUSTRALIA who said that all member governments had been able to participate in the wording of the new proposal. The delegate endorsed the new proposal.

The delegate of SOUTH AFRICA supported the resolution and asked for the creation of a Working Group assisted by the Secretariat and chaired by the incoming chairman of the Standing Committee to investigate a possible action plan to implement the proposal for submission to the 61st Plenary Meeting.

The delegates of BRAZIL, ZIMBABWE, COLOMBIA, SUDAN and EGYPT supported the new proposal on government measures and the recommendation by South Africa to create a working group on government measures.

The CHAIR observed that there was a consensus and approved the resolution as read by the Secretary General.

The CHAIR adjourned the session.

First Open Session

8:30 AM, Tuesday September 18, 2001
Mr. Michael T. G. Davies in the Chair

The CHAIR began the First Open Session by noting that the Committee has long acknowledged that the highest priority must be assigned to meeting the changing quality needs of textile manufacturers and final consumers through cooperative efforts between producers, consumers and traders. The CHAIR introduced Mr. Peter Dove to present a summary of discussions during a breakout session conducted on Monday on the topic of "Improving Ginning in Africa."

Mr. Dove said that with cotton production increasing in Africa and in order to lower operating costs it becomes necessary to invest in high capacity equipment, but new machinery will have to be designed taking into account that cotton in Africa is mostly hand-picked and has a low moisture content. He indicated that hand-picked cotton requires less cleaning. However, contamination remains a major concern for spinners, and ginning must be managed taking into account the quality aspect. Mr. Dove presented recommendations for improving ginning quality in Africa starting with a recommendation to closely monitor the supply of seed to farmers. He recommended that gins should be equipped with by-pass valves on cleaning machines to reduce fiber damage. Mr. Dove said that care should be taken not to use plastic material or polypropylene tarps during harvesting and that price incentives for better quality should be given to farmers. He noted that moisture content should be controlled and cotton with high moisture should be ginned as soon as possible aiming at 6% to 7% of moisture content at the gin to achieve optimum quality. Mr. Dove stressed the importance of a good maintenance of the ginning equipment and of automation of the ginning process. He noted that standardization of the appropriate packaging material is desired and governments should eliminate import barriers for ginning equipment in order to facilitate equipment modernization. Mr. Dove called for better training of gin managers and staff on maintenance and tuning of equipment in order to achieve high capacity and quality ginning, while maintaining high safety procedures. Mr. Dove's summary is a statement of the meeting.

The CHAIR opened the floor for discussion and questions.

The delegate of BRAZIL asked if consideration was given to a new concept of ginning rather than conventional ginning such as rotor, cage, and other types of ginning that would preserve the quality of the fiber, and what would be the possibility of introducing new types of ginning in the future.

Mr. Dove replied that the issue of high capacity

ginning of hand-picked cotton was discussed at the breakout session on ginning. He said ginning equipment producers are working on a revolutionary new system of ginning and representatives of these companies could provide all the details on future technology improvements.

The CHAIR asked what governments could do to assist the cotton industry in addition to eliminating import barriers for ginning equipment.

Mr. Dove noted that there is a lot that governments can do but the most important is to provide a duty free import regime for heavy equipment and machinery to benefit cotton producers and the country.

The CHAIR introduced Mr. Geoff Watson of Cargill Zimbabwe to present a report on Methods of Reducing Contamination in Cotton in Zimbabwe. Mr. Watson said that contamination is a major problem for the textile industry affecting the quality of yarn and textile products and Zimbabwe had enjoyed a reputation of contamination-free cotton for many years. He noted that after the liberalization of the cotton market in Zimbabwe in the mid-nineties a threat of increased contamination arose and the National Cotton Council of Zimbabwe was established to address the issue of quality standards. Mr. Watson said that cotton is grown by 200,000 farmers, with 85% of them cultivating on an average of 5 hectares or less and that 100% of the cotton is hand-picked. He noted that increased competition and wider usage of a cheaper polypropylene packaging material lead to an increased threat of contamination. Mr. Watson reported that the National Cotton Council comprising all sectors of the cotton industry in Zimbabwe addresses the issue of contamination with an educational campaign and the introduction of regulations. He said that ginning companies provided solid polypropylene bags of a dark color for cotton picking and that severe penalties were introduced for contaminated cotton. Mr. Watson said that it is important to eliminate any contamination on the mixing floor before cotton is ginned; furthermore new initiatives were introduced to improve the operations of the mixing floor by adding a separate decanting platform above the actual suction floor. He said that only after cotton is checked for contamination on a decanting platform it is moved to the suction floor. Mr. Watson noted that the process is still at an experimental stage and may be improved in the future. Mr. Watson's presentation is a statement of the meeting.

The CHAIR opened the floor for discussion and questions.

The delegate of INDIA said that cotton in India is also hand-picked and that packaging is one of the major concerns. He asked if there are any

cautious shifts from hand-picking to machine-picking in Zimbabwe and if it will lead to significant reduction in contamination. He also asked what would be the most desirable material for packaging and what would be the cost if cotton material were used for packaging compared with plastic bags.

Mr. Watson said that when cotton is produced by small-scale farmers as it is in India, hand-picking is the only method. He noted that the use of cotton material for bale packaging is cost-effective because of reduced contamination and labor costs associated with cleaning compared with the cost of material.

The delegate of COLOMBIA asked for a sample of the bags mentioned in the presentation to take with him to Colombia.

The delegate of EGYPT said that in Egypt efforts are made to reduce contamination and only new jute bags are used for cotton packaging. He said that at ginning mills cotton is checked for contamination in a special room before it is ginned. He noted that ginning with modern equipment should preserve the quality of the fiber, and that the producer should deal with the contamination of cotton.

The CHAIR interpreted the question from the Egyptian delegate as to what ginners could do to help reduce the problem of contamination.

Mr. Watson said that ginning equipment manufacturers could do something to help reduce contamination. However, at the moment the solution lies at the cotton producer level. He suggested that the representative of Lummus should address the question.

The representative of Lummus said that contamination should be eliminated before cotton enters the gin, as there is no technology at present to deal with contamination during ginning and especially with polypropylene contamination.

Mr. Watson made a comment that the education of farmers about the negative effects of contamination is the most important thing and should be heightened.

The delegate of TOGO said that his country is working to increase farmers' awareness about the problem of contamination and that this work has some effect, but it would be interesting to know what effects were achieved by the introduction of the stronger plastic bags mentioned by Mr. Watson in his presentation.

Mr. Watson said that the campaign on reducing contamination was started by the National Cotton Council, and it is an ongoing educational process. He noted that the short-term results were excellent and the educational process should be maintained constantly as new farmers enter cotton production every year.

The delegate of PARAGUAY said that the cotton industry in Paraguay faced the problem of contamination for many years and the educational campaign was actively promoted among farmers. He said that last year cotton bags for hand-picking were delivered to farmers together with cottonseed with strict instructions about their usage. He noted that the results of this action were above expectations in terms of reducing contamination. He said that contamination was reduced dramatically as farmers could deliver their seed cotton only in the supplied bags. He noted that contamination had to be eliminated at the farm level.

The delegate of BRAZIL made a comment saying that contamination remains a major problem for spinners and urged producers who use plastic bags to use bags of bright colors as spinning mills have equipment to remove colored material from cotton but cannot eliminate white or clear material.

The CHAIR introduced Ms. Marsha Powell of Cotton Council International to present a report by Andrew G. Jordan and Phillip J. Wakelyn on the impact of genetic engineering on cotton quality. Ms. Powell said that transgenic cotton was first introduced in the United States in 1995, and that in 2001 an estimated 10% of world cotton area was planted to transgenic cotton in Argentina, Australia, China (Mainland), Mexico, South Africa, and the USA. She noted that the increasing popularity of transgenic cotton is based on its improved insect resistance and herbicide tolerance, while causing no risks to human or animal health. However, Ms. Powell said that a number of evaluations of the transgenic technology effects on fiber quality were conducted

and the only lint quality parameter that showed a statistically significant difference was a slight increase in reflectance among transgenic cotton as compared with conventional cotton. However, the difference is not of practical importance from a textile point of view. Ms. Powell reported that Lewis' studies concluded that there were no impacts of transgenic cotton on fiber quality, and that a number of other studies had similar results. She said that sets of Official Variety Trials conducted by USA state universities resulted in a 3% reduction of micronaire in transgenic cotton compared with conventional varieties, which may be a desirable factor for the textile industry. Ms. Powell noted that transgenic cotton has certain yield advantages due to benefits of insect control. In conclusion she said that no evidence was found of any practical effect of genetically engineered cotton on fiber quality. The report is a statement of the meeting.

The CHAIR opened the floor for discussion and questions.

The delegate of UGANDA expressed her concern about the transfer of the technology to other countries and the effects of the introduction of the new varieties on yields and quality of the fiber produced in those countries.

The delegate of BELGIUM expressed his concern about traceability of cotton and informing the consumer about the presence of transgenic cotton in textile products.

Ms. Powell said that according to experts in the United States it had been communicated to manufacturers and retailers especially in Europe that, although the cotton plant is altered as a re-

sult of biotechnology, the fiber itself contains no altered genetic material.

The CHAIR commented that although concerns about transgenic cotton create a problem they also provide an opportunity, as some people could be prepared to pay a premium for organically grown and unaltered cotton.

The delegate of INDIA said that he appreciated the report on the quality aspects of transgenic cotton but would like more attention to be paid to the issue of disease and pest resistance in transgenic cotton.

Ms. Powell said that she would be happy to arrange contacts for the delegate of India with professionals from the United States working on this issue.

The delegate of GREECE pointed to the micronaire decrease in transgenic cotton and said that could be caused by the increased presence of immature fiber in transgenic cotton.

The CHAIR thanked the presenters for their reports on ginning, contamination, and transgenic cotton issues. He said that the focus of the discussion was on what governments could do to aid the industry and in terms of ginning governments could provide benefits for improvements of capital equipment. He noted that the contamination problem should be handled by the industry rather than by governments. As far as transgenic cotton is concerned, it is clear that it has almost no effect on the quality of the fiber, however public concern remains an issue and should be dealt with.

The CHAIR adjourned the session at 10:00 a.m.

Second Open Session

4:00 PM, Tuesday September 18, 2001

Mr. Danny Chippis in the Chair

The CHAIR opened the session by saying that it had been scheduled in response to concerns over the decline in cotton's share of world fiber mill use and with the objective of encouraging more countries to emulate the best practices to expand national cotton promotion efforts. The CHAIR introduced Mr. Andrew Macdonald, Coordinator of the Consortium for Cotton Promotion, to present a report of the Consortium on Promotion on Fostering Expanded Efforts to Enhance the Demand for Cotton.

Mr. Macdonald said that we are all conscious that cotton is not maintaining its market share in the consumption of textile fibers. He noted that the cotton industry must review the basic concepts of promotion and should convince the consumer, through promotion, of the advantages of cotton. He said that the agenda of the Con-

sortium is to encourage national market programs to boost cotton consumption, to act as a clearinghouse for the enhancement of ideas on cotton promotion and to explore a proposal to create a world cotton emblem. Mr. Macdonald said that organizations from Australia, Brazil, Egypt, Germany, Italy, India, Poland, South Africa, Turkey and Zimbabwe have joined the Consortium and that a number of other countries have expressed an interest in joining. He described promotional efforts in Australia, Poland and South Africa that include advertising, quality marks, and emblems. He presented proposals from Zimbabwe, India and Brazil on international cotton promotion and the creation of an international cotton emblem. Mr. Macdonald proposed to create a Cotton Fashion Day, a Cotton Experience Day and to stress the natural character of the fiber. He said that it is necessary to work to encourage cotton demand and urged national organizations to join the Consor-

tium. His report is a statement of the meeting.

The CHAIR introduced Mr. Peter Dorward of Zimbabwe to present a statement on boosting mill use of cotton in Africa.

Mr. Dorward said that textile industry representatives from Mozambique, Zambia, Uganda, South Africa, and Zimbabwe proposed to advise and assist member and non-member countries of the ICAC in the development and implementation of sound industrial policies resulting in increased domestic consumption of cotton, and to expand the value added benefits for the African people. As an example, countries should eliminate barriers to imports on machinery used in the textile industry. He said that national legislation should ensure that the spinning capacity in Africa would increase. He noted that subsidies provided by industrial nations distort markets and limit investments in Africa. He indicated that government policies should help in-

dustrialists and entrepreneurs to succeed in a fair competition. He said that African countries should industrialize based on own resources and comparative advantages. Mr. Dorward's report is a statement of the meeting.

The CHAIR commented that textile industries in Africa are relatively small and there is a certain amount of mistrust between some governments and the private sector. He said that an open debate is needed between the private sector and governments, and sound policies should be worked out in order to enhance domestic industries and cotton consumption. No other comments were offered.

The CHAIR introduced Mr. Laurie Kitch to present a report from FAO.

Mr. Kitch said that cotton is a crucial factor in the economies of many developing countries. He noted that cotton needed to secure world markets in order to continue to provide the means

for economic and social advancements. He said that regardless of the specific limitations, the choice of a fiber by a manufacturer is dependent upon consumption of end-use product. He noted that cotton's market share declined by 10 percentage points between 1986 and 2000, and that can be partly associated with the decline in investment in the promotion of cotton, with the exception of the United States. He said that the creation of the Consortium for Cotton Promotion increases the chances that cotton consumption would expand. He said that the Secretariats of FAO and ICAC have agreed to undertake a one-time survey to meet the needs of the next world cotton market projections and trade policy analysis. He noted that the survey would be completed by the end of 2002 and should be consistent with the previous FAO Fiber Consumption Surveys. He concluded that this work would provide a tool to know the market share of cotton and develop strategies to enhance demand in

specific markets. Mr. Kitch's report is a statement of the meeting.

The CHAIR asked if the statistics on cotton consumption include all cotton used including industrial and non-mill consumption.

The SECRETARY GENERAL clarified that consumption statistics include all kinds of cotton uses and net-trade of cotton and chemical fibers on a retail level.

The CHAIR recognized the delegate of BRAZIL who withdrew his earlier proposal to vote on the issue of subsidies and called for an additional meeting to work out a wording of the Statement on the issue of government measures. The delegate confirmed his capacity as an official delegate appointed by the government of Brazil.

The CHAIR adjourned the meeting at 5:20 p.m.

Closing

9:00 AM, Friday September 21, 2001
Mr. Sylvester R. Nguni in the Chair

The CHAIR called the meeting to order. On behalf of the Organizing Committee, the people of Zimbabwe and himself, he thanked the delegates and observers for finding the time to attend the meeting and hoped that their stay was comfortable and enjoyable in spite of the limited resources at their disposal. He extended his thanks to the Secretariat, in particular to the executive director, for the invaluable assistance and guidance given to the Organizing Committee in preparing for the plenary meeting. He introduced the members of the Organizing Committee who were present, Mr. Rob Jarvis of Quton Seed Company, Mr. Mike Davies of Cargill Zimbabwe, Mr. Bill Altham of the Commercial Cotton Growers Association and Mr. Barry Fisher of the National Cotton Council of Zimbabwe, and thanked all the other stakeholders of the cotton industry as well as the sponsors who made this meeting possible. He wished everybody a safe journey back home. He hoped that those who could would extend their stay and that the others would come back to discover more of Zimbabwe.

The CHAIR invited delegates to make closing comments.

The CHAIR recognized the delegate of the UNITED KINGDOM who thanked the hosts and his fellow delegates and observers for such a successful and enjoyable plenary meeting. He acknowledged all the work undertaken by the Secretariat, the interpreters and all the support people who had ensured such an efficient, effective and memorable week. He said that the

quality of the presentations and debate was very high because of the preparatory work and commitment of all those involved, especially the Organizing Committee, the Secretariat and the meeting's sponsors. He announced that the UK government has commenced discussions with the Liverpool Cotton Association about issuing an invitation to host the 2005 Plenary Meeting in Liverpool and that he hoped that a formal announcement would be made at the next plenary meeting in Egypt.

The delegate of UGANDA, on behalf of her government and her delegation, expressed her sincere gratitude to the government of Zimbabwe, the Secretariat of ICAC under Dr. Townsend, the Organizing Committee and the sponsors. She thanked the support teams of able women and men who worked behind the scenes, without whom the meeting would not have been possible. She commended the organization, which was excellent amid catastrophes. She singled out the breakout sessions, which were found to be very beneficial and informative especially to the developing countries. She hoped that the same set up would continue at subsequent plenary meetings. She expressed her thanks for the African touch that was given to the evenings and for the generosity of the hosts. She concluded in saying that she looked forward to the next plenary meeting in Egypt.

The delegate of AUSTRALIA said that the theme "An African Renaissance" was well chosen and that the opportunity for the exchange of information on practices and technologies between established and developing cotton producing countries had been a successful outcome of this

meeting. The forthcoming Cotton Research Conference in Cape Town will provide an opportunity for continuing the African renaissance. He welcomed those having expressed an interest in visiting Australia to study the various aspects of its cotton industry. He also welcomed the discussion on good trade practices, in particular the positive steps taken to pressure the reduction and elimination of trade distorting government measures. He thanked the ICAC Secretariat for its professionalism and determination in getting to Zimbabwe and doing the job according to its usual high standards. He acknowledged Dr. Townsend's leadership of the ICAC during the past year. He thanked the Organizing Committee for putting together this exceptional meeting and said that the arrangements exceeded all expectations.

The CHAIR recognized the delegate of CHINA (TAIWAN) who expressed his thanks to the government of Zimbabwe, the organizers and the sponsors of the meeting for the hospitality provided to all the participants. He extended his thanks to Dr. Townsend and his staff. He said that the wonderful arrangements would be memorable.

The delegate of TANZANIA, on behalf of his government and his delegation, thanked the Zimbabwean government for their warm hospitality and for organizing the 60th Plenary Meeting so well. He thanked the ICAC for the wonderful preparations. He requested ICAC to consider allowing more time for the Thursday session on production research and for the breakout sessions. He said he was looking forward to attending the next plenary meeting in Egypt.

The delegate of COLOMBIA, on behalf of his government, extended his sincerest thanks to Mr. Sylvester Nguni, the Organizing Committee and the government of Zimbabwe for the excellent plenary meeting, which adopted an ambitious work agenda for the benefit of the world cotton industry. He thanked the people of Zimbabwe, particularly the people of Victoria Falls, for their warm welcome. He said that the African renaissance would lead the rest of the world to acknowledge the importance of fostering equity in international trade, which is a prerequisite for progress of all the people of the world. He thanked the executive director, Dr. Terry Townsend, for his leadership and the excellent preparations for the plenary meeting. He said that the Colombian delegation was deeply affected by the tragic events in the USA and he regretted the absence of the delegation of the United States of America. He said that he was sorry that Dr. Francisco Davila was unable to head the Colombian delegation because of his health and he wished him a prompt recovery to resume his activities in the cotton sector.

Mr. Alfonso Liévano thanked the delegates for his nomination as Chairman of the Standing Committee and said that he was deeply honored. He announced his intention to move forward with the work agenda defined by this plenary and to activate the working group in charge of identifying effective strategies to reduce the distortions on international cotton trade. The CHAIR congratulated Mr. Liévano on his nomination.

The delegate of TURKEY expressed his gratitude to the ICAC, the government of Zimbabwe, the Organizing Committee and the numerous sponsors for arranging such an excellent meeting. He thanked all the members of the Organizing Committee for their efforts to make the meeting a successful one and for the exciting social events and safari tours. He said that he hoped to meet everybody again in Cairo in 2002.

The CHAIR recognized the delegate of SUDAN who thanked the government and the people of Zimbabwe for their hospitality and warm welcome. He extended his thanks to the Organizing Committee and to the Secretariat for their efforts and their excellent work. He said that he was looking forward to the next plenary meeting in Egypt.

The delegate of SOUTH AFRICA extended his

sincere thanks to the government of Zimbabwe, the Organizing Committee and the sponsors for this well organized and successful meeting. He noted that their efficient performance reflects most positively on the whole of Africa. He thanked the organizers by name: the National Cotton Council of Zimbabwe, comprised of the Cotton Company of Zimbabwe, the Zimbabwe Farmers Union, Cargill Zimbabwe, Quton Seed Company, and the Commercial Cotton Growers Association. He also thanked the sponsors by name: the Standard Chartered Bank of Zimbabwe, Lummus Corporation, Syngenta and Continental Eagle Corporation. He acknowledged that the hard work and good organization of Mr. Nguni's team produced both a productive work outcome as well as a most enjoyable free time entertainment. He rated the meeting as a most successful one. He thanked Dr. Terry Townsend and his staff for their hard work both up-front and behind the scenes. He expressed his appreciation to his fellow delegates for their contribution to the fruitful debates. He concluded his remarks in wishing all participants a safe return home to a world of hopefully more tolerance and reason.

The delegate of EGYPT extended his thanks and appreciation to the government of Zimbabwe for their warm welcome and gracious hospitality. He extended his gratitude to Dr. Terry Townsend and the Secretariat for their excellent work and to the Organizing Committee and all those who helped in this successful meeting. He said that he was looking forward to welcoming all the participants in Egypt next year.

The delegate of POLAND thanked the government and the people of Zimbabwe for the perfect organization and their warm hospitality. He congratulated Dr. Townsend and his staff for the excellent preparations for the meeting.

The delegate of INDIA praised a very enlightening, productive and enjoyable week against the backdrop of the majestic Victoria Falls. He thanked the delegates and the ICAC Secretariat for their contribution, cooperation and guidance in making the 60th Plenary Meeting such a fruitful one. On behalf of the Indian government, the Indian delegation and himself, he thanked the people of Zimbabwe.

The delegate of the PHILIPPINES, on behalf of his government and his delegation, added his

congratulations and deepest gratitude to the ICAC and the Zimbabwean Organizing Committee for a successful, fruitful and enjoyable meeting. He thanked the government of Zimbabwe and the Organizing Committee, especially Mr. Nguni, chairman of the plenary meeting, for the warmth, generosity and hospitality extended to all participants and for making their stay not only comfortable but also memorable. He concluded by saying that he was looking forward to seeing all participants in Cairo next year.

The delegate of IRAN joined the other delegates in expressing his thanks to the people and the government of Zimbabwe, the Organizing Committee, the Secretariat and the sponsors.

On behalf of his country, the delegate of BURKINA FASO thanked the Zimbabwean authorities for hosting the plenary meeting in such a pleasant setting, the Organizing Committee for their constant efforts to make the meeting a success, and the Secretariat for the quality of the program. He wished that more countries would seek membership in the ICAC which is the ideal forum for defending the vested interests of the cotton sector and for exchanging ideas. He concluded in regretting the number of absentees due to terrorism in the USA and expressed his wishes for a peaceful world.

The delegate of TOGO joined the other delegations in their congratulations. He added that his delegation was going home after the discussions more confident about the issues of GE cotton and government measures distorting the economy of cotton.

The delegate of BRAZIL said that he was very happy to have participated in the important discussions about the cotton situation in the world and he expressed his thanks to the Organizing Committee, the Cotton Company of Zimbabwe, the Secretariat and the Zimbabwean people.

The delegate of BELGIUM heartily endorsed the praises of all the other delegations.

There being no other comments, the CHAIR invited all participants to the "Brai" closing lunch. He wished them a safe journey back home, reiterating his hope that they could extend their stay or come back on another occasion to discover more of Zimbabwe. The CHAIR declared the 60th Plenary Meeting officially closed and adjourned the session at 10 am.

Steering Committee

First Meeting

Monday September 17, 2001 8:30 am
The Secretary General in the Chair

The SECRETARY GENERAL thanked delegates for their support of the ICAC and the government of Zimbabwe for hosting the meeting. He reported that the government of Zimbabwe had nominated Mr. Sylvester R. Nguni, Managing Director of the Cotton Company of Zimbabwe and Chair of the Zimbabwe Organizing Committee to serve as Chair of the 60th Plenary Meeting.

The SECRETARY GENERAL introduced Mr. Paddy Zhanda, farmer and businessman; Mr. W.G. Mashingaidze, Zimbabwe Farmers Union; Mr. Neville Brown, Commercial Cotton Growers' Association; Mr. Guy Menage, Commercial Cotton Growers' Association; Ms. Nancy Zitsanza, Ministry of Lands, Agriculture and Rural Resettlement; Mr. Rob Jarvis, Quton Seed Company; Mr. Michael Davies, Cargill Zimbabwe; Mr. Danny Chipps, Merspin Limited; and Mr. Barry Fisher, National Cotton Council of Zimbabwe, who were to serve as Vice Chairs of the meeting.

The only item of business was to approve the agenda of the meeting. The SECRETARY GENERAL noted that delegates had a copy of the proposed agenda. He announced that the report of the Chair of the Standing Committee and the inaugural comments by Dr. Joseph M. Made, Minister of Lands, Agriculture and Rural Resettlement, would be rescheduled during the week. He said that members of the Standing Committee were experiencing difficulties in traveling to Victoria Falls, and Dr. Made was unavailable this day. He asked if there were comments or additional changes.

Seeing none, the CHAIR concluded that the agenda was approved with the proposed amendments. He adjourned the meeting at 8:45 am.

Second Meeting

4:30 PM, Monday September 17, 2001
Mr. Sylvester Nguni in the Chair

The CHAIR invited the Secretary General to read Working Paper I, "Election of Standing Committee Officers," which is attached. The SECRETARY GENERAL reported that the Standing Committee nominated Mr. Alfonso Liévano of Colombia for the post of Chair of the Standing Committee, Mr. Ajai Malhotra of India for the post of First Vice Chair, and Ms. Chigozie Obi-Nnadozie of Nigeria for the post of Second Vice Chair.

The CHAIR observed that there was a consen-

sus to accept the recommendations in Working Paper I, and he extended his congratulations to the new officers.

The CHAIR invited the Secretary General to present Working Paper II, "The Recognition and Enforcement of Foreign Arbitral Awards," which is attached. The SECRETARY GENERAL summarized the working paper by saying that good trade practices include the settlement of disputes that inevitably arise in commercial transactions through a legal process of arbitration, and that some parties to contracts fail to abide by arbitral decision. The result is defaults on contracts for international trade in cotton. Defaults undermine confidence in the cotton trading system and impose costs that eventually must be absorbed by all participants in the cotton industry. Therefore, in order to bolster confidence in the cotton trading system, to improve the efficiency of the world cotton market and to encourage good trading practices, the ICAC urges member governments to:

- Encourage good trade practices and uphold the sanctity of contracts, and to

- Encourage their industries to abide by both the spirit and the letter of arbitration arrangements and to accept valid arbitration judgments, and to

- Urge governments to make valid arbitral awards enforceable under member countries' laws.

The CHAIR asked if there was opposition to the recommended resolution prepared by the Standing Committee.

The CHAIR observed that there was a consensus to approve the resolutions contained in Working Paper II.

The CHAIR asked the Secretary General to introduce members of the Private Sector Advisory Panel in order to begin a roundtable discussion between the PSAP and the Advisory Committee.

The SECRETARY GENERAL observed that the PSAP was formed in 1999 after three years of discussions within the ICAC. The PSAP is representative of the three major segments of the cotton industry, producers, merchants and spinners, and of both developed and developing countries. Panel members serve at their own expense. Among the members of the Panel are some of the most respected people in the private sectors of the cotton industries of member countries. He introduced Ms. Bridgett Jackson, Mr. Andrew Macdonald, Mr. John Accas, Mr. Suresh Kotak, Mr. Romano Bonadei, Mr. Felix Stiegwardt, Mr. John Arlett, Dr. Sebahattin Gazanfer, and Mr. Ray Butler as members of

the PSAP. He noted that Panel members had elected Mr. Felix Stiegwardt as Chair of the Panel, and he invited Mr. Stiegwardt to lead the discussion.

The Chair of the PSAP thanked the Steering Committee for the opportunity to engage in discussion. He reminded the Committee that the PSAP has presented reports to the Steering Committee at the last two plenary meetings and looked forward to the opportunity for useful dialog at this meeting. The discussion was to focus on four topics: sanctity of contracts, genetically engineered cotton, World Bank development efforts and government measures, he said.

The Chair of the PSAP introduced Mr. Andrew Macdonald who noted that Working Paper II, "The Recognition and Enforcement of Foreign Arbitral Awards," had just been approved. Mr. Macdonald commented that declining prices implied that the sanctity of contracts will come under attack and that it was necessary to reinforce the importance of redoubling efforts to support the sanctity of contracts. He urged governments and the private sector to work together to educate all concerned about the importance of the sanctity of contracts.

The delegate of UGANDA noted that developing countries appreciate resolutions, but that in liberalized markets with willing buyers and sellers governments find it difficult to enforce contracts that they are not party to. The delegate asked that merchants involved in trading write to their governments to ask that laws be enacted to enable the enforcement of arbitral awards.

The Chair of the PSAP said that he appreciated the delegates' thoughts but felt that the New York Convention was sufficient. The delegate of COLOMBIA agreed with the Chair.

Mr. Ray Butler reminded delegates that sanctity of contracts was concerned with the enforcement of foreign arbitral awards and that the New York Convention included such enforcement. Mr. Butler encouraged governments to adopt the New York Convention.

Mr. Suresh Kotak mentioned a model law recommended by UNCITRAL in 1995 whereby all arbitration law was served in a single comprehensive law. He suggested that this could serve as a template to be used by other countries.

The delegate of AUSTRALIA noted that Australia was a signatory to the New York Convention and that it had passed the International Arbitration Act in 1974.

The Chair of the PSAP then introduced Mr. Romano Bonadei and asked him to discuss genetically engineered cotton. Mr. Bonadei explained that the use of genetically engineered cotton was expanding rapidly due to the eco-

conomic benefits to both producers and consumers. He urged governments to approve the use of genetically engineered cotton based on the preponderance of evidence, including reduced pesticide use and lower production costs. He also noted that governments do not allow farmers to grow genetically engineered cotton commercially in Europe and that some textile buyers refuse to accept products made with genetically engineered cotton.

Mr. Kotak was then introduced to discuss World Bank development projects. Mr. Kotak noted that price risk management has become more important and urged education as a means of encouraging greater acceptance.

The delegate of SUDAN wondered if risk management systems were another form of subsidy and asked for further clarification on the definition of risk management. Mr. Kotak said that risk management was not a subsidy and that any country could adopt it.

Mr. Macdonald likened risk management to an insurance policy whereby a farmer could be certain of the price of his crop at the time of planting.

The Chair of the PSAP next moved to the subject of government measures. He referred to Secretariat reports and Working Paper III, "Government Measures and the World Cotton Industry," which is attached. The PSAP reiterated the impact of distortions from government measures and pointed out that subsidies resulted in lower prices to all producers. The ICAC was urged to raise the issue of government measures with the WTO.

The Chair of the PSAP noted that a gradual but steady reduction in subsidies was needed and hoped that this trend would continue until reaching a total elimination of government measures. Referring to Working Paper III, he read the proposed resolutions. The PSAP urged that the stronger of the two resolutions be adopted referring to "major exporting countries."

The delegate of GREECE said that the subject was a serious one that it was not prepared to be discussed in the time available. The delegate thought it sensible to delay further discussion until the next day as had been scheduled.

The delegate of COLOMBIA asked how the PSAP members envisaged negotiators planning a gradual reduction. The Chair said that the PSAP realized that an immediate reduction was unrealistic but rather was looking for a way to gradually reduce subsidies.

The Chair of the PSAP, seeing no other comments, thanked the Steering Committee for the opportunity to discuss these issues with them.

The CHAIR of the Second Meeting of the Steering Committee thanked the PSAP and adjourned the meeting at 5:40 pm.

ATTACHMENTS

Working Paper I

Election of Standing Committee Officers

Recommendation from the Standing Committee

The Nominating Committee met on April 24, 2001 in the office of the Secretariat to propose a slate of officers for the Standing Committee for the coming year. Delegates from Colombia, India, the USA and Zimbabwe and the executive director were in attendance. Mr. Lawrence Blum of the USA was elected as Chair of the Nominating Committee.

The Nominating Committee recommended that Mr. Alfonso Liévano of Colombia be nominated as Chair of the Standing Committee. Mr. Liévano is Commercial Advisor for the Colombian Government Trade Bureau in Washington. He served as First Vice Chair of the Standing Committee and Chair of the Subcommittee on Budget during 2000-01.

The Nominating Committee recommended that Mr. Ajai Malhotra of India be nominated as First Vice Chair. Mr. Malhotra is Minister (Commerce), Embassy of India in Washington. He served as Second Vice Chair of the Standing Committee and Chair of the Working Group on Plenary Meeting Venues during 2000-01.

The Nominating Committee recommended that Ms. Chigozie Obi-Nnadozie of Nigeria should be nominated as Second Vice Chair. Ms. Obi-Nnadozie attended all Standing Committee meetings and participated in the Working Group on Plenary Meeting Venues during 2000-01. She is Minister Counsellor, Embassy of Nigeria in Washington.

The Standing Committee accepted the recommendations of the Nominating Committee at its 453rd meeting.

Accordingly, the Standing Committee proposes the following slate of officers to the Plenary Meeting for the coming year:

—Mr. Alfonso Liévano of Colombia for the post of Chair of the Standing Committee

—Mr. Ajai Malhotra of India for the post of First Vice Chair

—Ms. Chigozie Obi-Nnadozie of Nigeria for the post of Second Vice Chair

Working Paper II

The Recognition and Enforcement of Foreign Arbitral Awards

Recommendation from the Standing Committee

Good trade practices include the settlement of disputes that inevitably arise in commercial transactions through a legal process of arbitration. The Convention on the Recognition and Enforcement of Foreign Arbitral Awards (New York Convention of 1958) requires countries to enforce valid arbitration awards.

The subject of good or fair trade practices, sometimes called contract sanctity, has been discussed often in the ICAC. The matter is of importance to the world cotton industry because each year some parties to contracts fail to abide by arbitral decisions. The result is defaults on contracts for international trade in cotton. According to statistics compiled by the Committee for International Co-operation between Cotton Associations (CICCA), the value of arbitral awards in cotton during the most recent six years is about \$120 million, half of which is still owed by defaulting parties. The average award is approximately \$200,000. Thus, while arbitral awards are often substantial, they are usually within the means of medium-sized firms to fulfill. Defaults undermine confidence in the cotton trading system and impose costs that eventually must be absorbed by all participants in the cotton industry.

Arbitration is a private process that commences with the agreement of parties to submit disputes for decision by an impartial tribunal of recognized arbitrators under the rules of a trade association. Arbitral decisions and awards are final and legally binding on both parties. Arbitration can streamline substantially the process of dispute resolution and thereby contribute to the health of the world cotton economy.

According to information provided to the Committee by representatives of CICCA, defaults on valid arbitration awards occur for many reasons. Some parties to disputes may believe that the panel of arbitrators deciding their case is biased. Dishonesty, weak financial conditions, lack of knowledge or negligence about the law and a lack of knowledge about cotton quality standards may also contribute to the violation of good trade practices. Member trade associations of CICCA acknowledge their obligation to ensure impartiality and to provide training and support to enable all members of the cotton trade to understand fully contract terms, cotton standards and the arbitration process.

In addition, if government support for the enforcement of valid foreign arbitration awards is deemed to be insufficient, parties may be encouraged to default on obligations. For the process of arbitration to be effective, the courts in the countries of all parties involved must enforce valid arbitral awards.

Therefore, in order to bolster confidence in the cotton trading system, to improve the efficiency of the world cotton market and to encourage good trading practices, the Standing Committee recommends that the Advisory Committee urge member countries of the ICAC to:

- Encourage good trade practices and uphold the sanctity of contracts, and to
- Encourage their industries to abide by both the spirit and the letter of arbitration arrangements and to accept valid arbitration judgments, and to
- Urge governments to make valid arbitral awards enforceable under member country's laws.

Working Paper III

Government Measures and the World Cotton Industry

Recommendation from the Standing Committee

The subject of government measures in cotton has been discussed in the ICAC since the creation of the Committee in 1939. Throughout the 1990s, the Committee drew attention to the impact of government measures that distort production and trade in cotton. A number of countries in the ICAC have noted that trade barriers and subsidies in some countries contribute to price volatility and impact adversely the level of cotton production in other countries. Countries have noted that barriers to trade in cotton and cotton textiles hinder economic development, and a number of countries have expressed the view that subsidies lower world cotton prices and cause the burden of adjustment to lower cotton prices to fall heavily on producers in countries with limited government support.

In the early 1990s, the ICAC looked forward to the successful outcome of the Uruguay Round of GATT multilateral trade negotiations and encouraged member countries to actively support efforts to conclude the discussions on agriculture satisfactorily. In 1994, the ICAC noted that the Uruguay Round Agreement did not meet the expectations of all countries, particularly efficient exporting countries. Nevertheless, it was

recognized that the World Trade Organization (WTO) is an effective forum to monitor the Agreement on Agriculture, and member countries were encouraged to observe commitments arising from the Round in order for agriculture to benefit fully from inclusion in the multilateral trading system.

In the late 1990s, after the creation of the WTO, many governments remained concerned that subsidies, particularly production and export subsidies, tariffs and trade barriers distort the world cotton economy. Numerous governments urged the elimination of these practices throughout the whole production, processing and marketing chain. However, governments have noted also that measures affecting the cotton industry often have social purposes or are implemented to encourage good environmental practices or to achieve other beneficial objectives. Therefore, the ICAC recognized that subsidies, tariffs and trade barriers are appropriately addressed in the WTO, and governments expressed the wish that multilateral negotiations in the WTO result in a substantial reduction in measures that distort production and trade. In the 59th Plenary Meeting in Cairns in 2000, the ICAC explicitly asked the WTO to urgently consider the distortions created by subsidies in the cotton market.

Reports by the Secretariat indicate that government measures have an impact on the structure of the world cotton economy. The most recent report by the Secretariat on government measures indicates that the level of direct assistance to production provided by governments amounted to \$3.6 billion in 2000/01. According to the Secretariat, 55% of world cotton production is benefiting from direct income or price support programs in 2000/01, and cotton area in countries that provide direct subsidies to growers increased from 11 million hectares in 1998/99 to 11.7 million in 2000/01. In contrast, cotton area in countries that do not provide direct subsidies to growers declined from 22 million hectares in 1998/99 to 20 million in 2000/01.

At the 454th Standing Committee Meeting, some delegates recommended that the Standing Committee develop a statement condemning domestic policies that distort cotton prices and trade. It was further recommended that the statement should urge WTO negotiators to move forward with constructive proposals to reduce trade and production distorting policies, and that the statement be presented to the plenary meeting for discussion, adoption and communication to the broadest possible audience. The Private Sector Advisory Panel echoed these sentiments during a round table discussion with the Standing Committee in June in Washington. The PSAP noted that governments seek to achieve many valid objectives through the use of measures affecting agriculture and that it is not realistic to expect the immediate elimination of all forms of government measures. Therefore, the PSAP sug-

gested that the ICAC focus its efforts on achieving a gradual but steady reduction in those government measures that directly subsidize increased cotton production.

In response to these instructions, the executive director developed a set of resolutions between the 454th and 455th meetings of the Standing Committee that were contained in Attachment III to SC-N-455 for consideration by the Standing Committee at the 455th Meeting. Attachment III contained the following resolution:

The Standing Committee should recommend that the Advisory Committee urge member countries of the ICAC to:

- Adopt policies to reduce and eventually eliminate, to the extent possible, the negative effects on trade caused by direct government assistance to cotton production and trade implemented by some countries, and to
- Encourage the WTO to urgently consider trade distortions on the world market caused by measures taken by some governments, and to
- Advise their WTO negotiators to move forward with constructive proposals to reduce the trade and production distortions caused by policies implemented by some governments.

Delegates of the USA and Spain supported adoption of the resolutions contained in Attachment III. However, delegates from Brazil, Chad, Egypt and Nigeria felt that the language calling for an end to measures that distort trade in cotton should be strengthened. The delegate of Brazil proposed the following:

The Standing Committee should recommend that the Advisory Committee urge member countries of the ICAC to:

- Adopt policies to reduce and eventually eliminate the negative effects on trade caused by direct government assistance to cotton production and trade implemented by major exporting countries, and to
- Encourage the WTO to urgently consider trade distortions on the world market caused by measures taken by governments of exporting countries, and to
- Advise their WTO negotiators to move forward with constructive proposals to reduce the trade and production distortions caused by policies implemented by the governments of countries that export cotton.

The delegate of the USA noted that there are many governmental policies that have negative effects on trade including export controls, price controls, export restrictions and various forms of import restrictions. He noted that trade-dis-

orting measures are not exclusive to exporting countries and that the proposed changes contained in the second set of recommendations fundamentally narrow the scope of the Secretariat paper on government measures. The delegate of Spain said that it is possible to modify policies to reduce their impacts on trade and production without eliminating the policies.

The delegates of Brazil, Chad, Egypt and Nigeria noted that it was inconsistent to call for an elimination of the negative effects of policies without also dealing with the programs and policies that cause the negative effects, and inclusion of the phrase "to the extent possible" would allow countries to continue to implement policies that distort world trade. These delegates said that new programs being developed to support farmers with subsidies that would distort production and trade are a major concern, and that these concerns justify strengthened language in the resolutions.

Because it was not possible to reach consensus, both sets of resolutions are being forwarded to the Advisory Committee for discussion during the 60th Plenary Meeting. Discussion during the Plenary Meeting will be aimed at reaching a consensus on which a set of resolutions should be adopted for communication to the broadest possible audience, including the press, member countries and multilateral organizations.

Third Meeting

8:30 AM, Friday September 21, 2001
Ms. Nancy Zitsanza in the Chair

The CHAIR reported that the Drafting Group had met the previous evening to prepare the draft statement. She thanked Mr. Eugene Brock of South Africa, who had chaired the Drafting Group, for his efforts. The CHAIR asked the Secretary General to read the draft of the statement. After the draft was read, the CHAIR asked delegates for their comments.

The delegate of the UK proposed that the following sentence be added in the paragraph on government measures, "The Committee expressed appreciation for the ongoing efforts made by the EU to reduce subsidies that distort cotton production, and noted that cotton area in the EU is being affected accordingly." The CHAIR saw there were no objections to the UK proposal.

The delegate of AUSTRALIA noted that the Secretariat had omitted the phrase, "reduction and elimination" in one sentence when preparing the draft statement. The CHAIR instructed the Secretariat to make that correction.

The CHAIR saw that no other additions or corrections were offered and found that there was a consensus to approve the statement as corrected.

The CHAIR asked Mr. Neville Brown, who had been elected Chair of the Committee on Cotton Production Research, to report on the Technical Seminar that had been held on September 20. Mr. Brown reported that eleven reports from eight countries had been received during the technical seminar on topics related to Integrated Crop Management. The Committee also reviewed topics for the 2002 Technical Seminar and reviewed preparations for the World Cotton Research Conference-3. He summarized the papers. His report is attached.

The CHAIR asked for comments on the report.

The CHAIR observed that there was a consensus to accept the report.

The CHAIR adjourned the Steering Committee at 9:05 am.

ATTACHMENT

Report of the Chair of the Committee on Cotton Production Research

Neville Brown

Madam Chair, ladies and gentlemen, first I would like to thank the Organizing Committee for nominating me to chair the Third Open Session/Technical Seminar and the meeting of the Committee on Cotton Production Research of the ICAC. We had eleven papers presented in addition to reports from the ICAC Secretariat. We discussed a variety of issues within the overall framework of integrated crop management.

Mr. Mike Burgess, a private consultant from South Africa, discussed four new developments in the region. They are: establishment of independent commodity research institutions, conservation farming, improved pest management and working in groups. Mr. Burgess quoted the example of Zambia where an independent Cotton Research Trust has been established that transformed research on cotton in the country. In conservation tillage, among others he mentioned retention of crop residue, restricting tillage to only cropped area and cultivation of nitrogen fixing crops. In Malawi, Mozambique and Zambia organizations are assisting farmers to work in groups.

Mr. Isidor Gilan from the Philippines further elaborated on the idea of farmers working in groups. He stated that low yields in the Philippines are not due to poor soil or climate but rather to small farming units. Small farming units limit the adoption of new technologies and ultimately result in inefficient farming. According to Mr. Gilan, the solution lies in farm clustering and cooperative/group farming and the use of ratio-

nal production technology accordingly. AgriSwiss, a private company, is working on these lines in the Philippines.

Mr. Rob Jarvis made a presentation on the impact of seed quality and crop management practices on fiber quality. He described in detail the process followed in Zimbabwe at various stages of variety development, seed production, pest management, picking, and seedcotton handling and ginning so that lint quality is not sacrificed at any stage. In Zimbabwe, farmers are encouraged to produce contamination-free cotton through the implementation of premiums and discounts.

Mr. Darlington Mutetwa, also from Quton Seed Company of Zimbabwe, stated that breeders in Zimbabwe have fully utilized host plant resistance as a component of integrated crop management. Zimbabwe developed varieties having built-in resistance to jassid, bacterial blight and verticillium wilt. In the last 15 years, not only resistance to target pests has been incorporated, yields have improved along with an improvement in staple length and ginning outturn from 34-36% to around 42%.

Dr. Lastus Serunjogi of Uganda further elaborated the role of breeding in integrated crop management and stated that breeding plays a significant role by putting together desirable genes that interact with the environment—natural and farmer's management—for derivation of desired crop performance. Dr. Serunjogi recounted large-scale contributions of breeding work and also discussed limitations that handicap breeders.

Dr. Hussein Yehia Awad of the Cotton Research Institute, Egypt, explained the crop management practices followed in Egypt that produce the highest quality cotton in the world. He observed that not only are soil and climatic conditions suitable for cotton in Egypt, but proper thinning, fertilization, irrigation, pest management, clean hand picking and ginning are also managed so that they meet the needs of the cotton plant and maintain inherent high quality.

Bt cotton has been planted in South Africa since 1998/99 and based on three years of performance, Dr. Deon Joubert of South Africa concluded that Bt cotton gave higher yield, improved ginning outturn and lowered the cost of production without any effects on fiber length and micronaire. Bt varieties reacted to diseases in the same way as non-Bt varieties. In South Africa, Bt cotton has become more popular among small farmers.

Mr. Andrew Bennett of Monsanto stated that the three fundamental requirements for utilization of transgenic cotton are formulation of biosafety legislation, testing within biosafety rules and the availability of transgenic seeds for commercial production. He also stated that intellectual property rights are crucial without which commer-

cial use could remain restricted. He also emphasized that the utilization of biotechnology has to be a collaborative effort by developing partnerships.

Dr. Doulaye Traore of Burkina Faso convincingly supported the adoption of transgenic cotton in African countries. He stated that there is a need to develop trained manpower in the region and that the responsibility lies with educational institutions to do so. He also observed that the technology is not risk free but that we need to make rational choices.

Dr. Servet Kefi of Turkey analyzed the possible benefits and potential risks of genetically engineered crops and observed that proper risk assessment, risk management and risk communication programs must be managed on a case-by-case basis for successful utilization of engineered products. According to Dr Kefi, if risk analysis procedures are implemented, GE cotton could be a good component of an integrated crop management program, otherwise GE cotton may carry a serious threat for human/animal health and the environment.

Many aspects of biotechnology were discussed in addition to its role as a component of the integrated crop management system. Can Bt cotton help to control fusarium wilt, bacterial blight or other diseases? The answer is no. Can Bt cotton increase yield? The answer is yes, particularly under low yields due to poor pest control. From the discussion we had, I would conclude that Bt cotton could have an effect on quality

and it is for breeders to keep this issue in mind during the back-crossing process. We also discussed the issue of resistance development in transgenic cotton against the currently available commercial Bt gene. It is concluded from the papers presented and also from the discussion that Bt cotton definitely requires a resistance management program in order to avoid any future problems, though resistance has not yet been noted in any country that has adopted Bt cotton, including China (Mainland). It was also observed that there is no toxin residue in the fiber and the quantity of the residue in the seed is far below dangerous levels.

Dr. Derek Russell of the Natural Resources Institute of the UK presented a look into the future of integrated pest management. He anticipated that due to a shortage of labor, herbicide use is going to increase. Pest management "in the seed" will become the overwhelmingly dominant approach in the future, thus increasing the role of breeders. Biotech applications will expand to control many more species of insects and disease-causing organisms.

Insecticides can be sprayed using a huge quantity of water, using ultra low volumes and using very low volumes. A representative of CIRAD-CA, France, who has experience working in the West African region where very low volume spraying is popular clarified the issue. Very low volume spraying is efficient and effective against the target bollworms, particularly on the top

portion of the plant in West African countries. But, it does carry some threats for applicators, who in most cases are young children.

Topic for the Technical Seminar 2002

The Committee on Cotton Production Research of the ICAC considered four topics proposed by the Secretariat and decided to hold the 2002 Technical Seminar on the topic "Technology, Management and Processing for Quality Fiber."

World Cotton Research Conference-3

The World Cotton Research Conference-3 will be held in Cape Town, South Africa, from March 9-13, 2003. The Conference has already been announced and the ICAC Secretariat is receiving pre-registrations. So far, 67 researchers from 15 countries have pre registered. The International Committee of the WCRC-3 met in Victoria Falls on Tuesday September 18, 2001 and reviewed preparations for the WCRC-3. The Secretariat report showed that preparations for the WCRC-3 are going on as planned and will be further boosted very soon.

It was really an honor to chair the Third Open Session and the meeting of the Committee on Cotton Production Research of the ICAC. We had many interesting papers but were certainly limited by a shortage of time. There was a lot of interaction too but I strongly feel that ICAC should plan on allocating more time for the technical session at the next plenary meeting.

DOCUMENTS

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| <p>1.² Agenda</p> <p>2.¹ Report of the Chairman of the Standing Committee</p> <p>3.¹ Report of the Executive Director</p> <p>4.¹ COTTON: Review of the World Situation–July-August 2001</p> <p>5. COTTON: World Statistics–September 2001</p> <p>6. The Outlook for Cotton Supply in 2001/02</p> <p>7. World Textile Demand–September 2001</p>
<p>1.² Ordre du jour</p> <p>2.¹ Rapport du Président de la Commission permanente</p> <p>3.¹ Rapport du Directeur exécutif</p> <p>4.¹ COTON : Examen de la situation mondiale–juillet-août 2001</p> <p>5. COTON : Statistiques mondiales–septembre 2001</p> <p>6. Les perspectives de l’offre de coton en 2001/02</p> <p>7. La demande textile mondiale–septembre 2001</p>
<p>1.² Agenda</p> <p>2.¹ Informe del Presidente del Comité Permanente</p> <p>3.¹ Informe del Director Ejecutivo</p> <p>4.¹ ALGODON: Revista de la Situación Mundial-Julio-Agosto 2001</p> <p>5. ALGODON: Estadísticas Mundiales–Septiembre 2001</p> <p>6. Perspectivas de la Oferta Algodonera en 2001/02</p> <p>7. La Demanda Mundial de Textiles–Septiembre 2001</p> | <p>8. World Cotton Trade–September 2001</p> <p>9.² THE ICAC RECORDER–September 2001</p> <p>10. Survey of the Cost of Production of Raw Cotton–September 2001</p> <p>11. Production and Trade Policies Affecting the Cotton Industry–September 2001</p> <p>12. Report of an Expert Panel on Ginning Methods–September 2001</p> <p>13. Directory–2001</p>
<p>8. Le commerce mondial du coton–septembre 2001</p> <p>9.² THE ICAC RECORDER–Septembre 2001</p> <p>10. Enquête sur le cout de la productin de coton brut–septembre 2001</p> <p>11. Production et politiques du commerce affectant l’industrie du coton–septembre 2001</p> <p>12. Rapport du Panel d’experts sur l’egrenage du coton–septembre 2001</p> <p>13. Répertoire–2001</p>
<p>8. El Comercio Algodonero Mundial–Septiembre 2001</p> <p>9.² THE ICAC RECORDER–Septiembre 2001</p> <p>10. Encuesta sobre el costo de producción de la fibra de algodón–Septiembre 2001</p> <p>11. Políticas sobre la producción y el comercio que afectan la industria del algodón–Septiembre 2001</p> <p>12. Informe del Panel de Expertos sobre los Métodos de Desmotado–Septiembre 2001</p> <p>13. Directorio–2001</p> |
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WORKING PAPERS¹

I	Election of Standing Committee Officers	Election du bureau de la Commission permanente	Elección de los funcionarios del Comité Permanente
II	The Recognition and Enforcement of Foreign Arbitral Awards	Reconnaissance et applications des décisions et jugements d’arbitrage étranger	Reconocimiento y ejecución de los laudos arbitrales extranjeros
III	Government Measures and the World Cotton Industry	Mesures gouvernementales et industrie cotonnière mondiale	Las medidas gubernamentales y la industria algodonera mundial
IV	Topic of the 2002 Technical Seminar	Thème du Séminaire technique de 2002	Tema del Seminario Técnico de 2002

¹ Available in Arabic, English, French, Russian and Spanish.
Disponibles en anglais, arabe, espagnol, français et russe.
Disponibles en árabe, español, francés, inglés y ruso.

² Available in English, French and Spanish.
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