



PROCEEDINGS

61st Plenary Meeting of the
International Cotton
Advisory Committee

Cairo, Egypt
October 2002

PROCES-VERBAL

61ème Réunion Plénière du
Comité Consultatif
International du Coton

Le Caire, Egypte
Octobre 2002

ACTAS

61a Reunión Plenaria del
Comité Consultivo
Internacional del Algodón

El Cairo, Egipto
Octubre 2002

**PROCEEDINGS
OF THE
61st PLENARY MEETING**

**“The 21st Century Cotton Industry:
Growth Through Private Investment”**



ICAC
Washington DC USA

FOREWORD

At the invitation of the Government of the Arab Republic of Egypt, the 61st Plenary Meeting of the International Cotton Advisory Committee was held in Cairo, from October 20 to 25, 2002.

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 la R.A. d'Egypte, le Comité consultatif international du coton a tenu sa 61ème Réunion plénière à le Caire, du 20 au 25 octobre 2002.

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 la República Arabe de Egipto, la 61a Reunión Plenaria del Comité Consultivo Internacional del Algodón se celebró en el Cairo, del 20 al 25 de octubre de 2002.

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

Brazil

Burkina Faso

Cameroon

Chad

China (Taiwan)

Colombia

Côte d'Ivoire

Egypt

Finland

France

Germany

Greece

India

Iran

Israel

Italy

Japan

Republic of Korea

Mali

Netherlands

Nigeria

Pakistan

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Russia

South Africa

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Sudan

Switzerland

Syria

Tanzania

Togo

Turkey

Uganda

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United States

of America

Uzbekistan

Zimbabwe

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STATEMENT OF THE 61st PLENARY MEETING

“The 21st Century Cotton Industry: Growth Through Private Investment”

Cotton and cotton textile industries are central to the economic growth of both developed and developing countries and contribute to development that is sustainable and socially responsible. Cotton is the raw material of wealth, industrialization and development. It is a vital cash crop providing income for everything from education, health and housing to transportation and often serves as a catalyst for industrialization and rising social welfare.

The International Cotton Advisory Committee met in Cairo, Egypt, during October 20-25, 2002 for its 61st Plenary Meeting since 1939. Representatives from 38 governments and 8 international organizations participated in the meeting.

1. World production reached a record of 21.5 million tons in 2001/02, exceeding world consumption by 1.3 million tons and pushing ending stocks outside China (Mainland) to their highest level since 1985/86 (Annex I). International cotton prices fell to the lowest average level in 30 years of 41.8 cents per pound in 2001/02. World cotton exports increased by 10% to a record of 6.5 million tons in 2001/02. World cotton consumption surpassed the 20-million ton mark for the first time in 2001/02, and cotton's share of the world textile fiber market increased for the first time since 1990 to an estimated 40.7% in 2001. Nevertheless, and despite the increase in the quantity of cotton produced, the value of world production declined by \$5 billion from the previous season, affecting the incomes of millions of growers, input suppliers and service providers in most countries.

2. According to projections by the Secretariat, world production is declining by 10% to 19.3 million tons in 2002/03, while consumption is expected to increase by 2.5% to 20.7 million tons. The average international cotton price is projected to increase eleven cents to 53 cents per pound in 2002/03. However, because of large stocks, cotton prices are expected to remain well below the average of the last 30 years.

3. Many countries are facilitating increased transparency and enhanced competition within their cotton sectors in order to promote increased efficiency and faster economic growth. The Committee heard of successful efforts at privatization and of continued challenges facing private sector investors in many countries. Member governments agreed that policies and programs that provide disincentives to increased investment in cotton production and processing industries should be reviewed. In particular, it was noted that barriers to imports of equipment, and taxes on the purchase of equipment, used in cotton production and processing provide a disincentive to expansion in the cotton industry.

4. The world textile economy is consumer-driven, and competition within the textile industry requires that spinners meet consumer's demands for products of improved quality. The Committee noted that continued efforts are needed to encourage improved cotton quality so as to facilitate increased cotton use. The Committee heard from growers, spinners and merchants about quality evaluation systems based on instrument measurement of intrinsic fiber characteristics valued by the spinning industry. These systems are of benefit to all segments of the cotton industry. The implementation of instrument based quality evaluation systems can result in price incentives that encourage producers to provide cotton to spinners with the characteristics that better meet the demands of quality conscious consumers. It was also noted that instrument based quality evaluation systems can be expensive to introduce and operate. Improvements in instrument reliability and test repeatability would be beneficial.

5. The subject of government measures that distort production and trade in cotton is of concern to member governments and has been a subject of discussion within the ICAC since 1985. According to the Secretariat, in 2001/02 fourteen countries provided direct income and price support protection to their cotton producers. The impact of these measures was to raise world cotton production, lower international cotton prices and distort trade in cotton. The Committee strongly supports a successful outcome to the talks on agriculture and other topics being conducted under the auspices of the WTO and expects that the talks will result in meaningful reductions in levels of government measures, predominantly domestic support, that distort cotton production and trade.

The Committee received proposals on the subject of Government Measures and the World Cotton Industry. Annex II was approved by the majority of member countries, and the United States of America also presented a proposal, which was accepted completely by the Greek delegation. Common to the proposals is the suggestion that member governments agree within the talks on agriculture and other topics being conducted under the auspices of the WTO to a specific schedule of reductions in government measures that distort cotton production and trade, and that governments look for ways to reduce tariffs on cotton textiles and apparel in order to expand trade in cotton products. It was also acknowledged that the problems of all cotton growers deserve understanding and immediate attention.

6. The Committee on Cotton Production Research organized a technical seminar on the topic of technology, management and processing for quality cotton. Pest attacks on cotton not only result in reduced production but also lower fiber quality. Transgenic cotton use is expanding and already accounts for one-third of world production. The cotton industry has accepted the technology as science-based and there are no apparent impacts on international trade in cotton. Cotton producers are responding to low cotton prices by changing their production practices, and some of the changes have negative impacts on fiber quality. There is a consensus that instrument testing of fiber quality is superior to manual classing of cotton, but there is a need for harmonization among instrument testing systems, resulting in increased speed and precision that produce credible results trusted by the industry. There is a need to incorporate measurements of fiber characteristics that reflect the spinning performance of cotton into national quality evaluation systems in order to encourage the increased production of cotton with the characteristics desired by spinners thereby enhancing the utilization of cotton.

The Committee will hold the 2003 Technical Seminar on the topic “Effect on Advances in Processing Techniques on Demand for Quality Cotton.”

7. The Committee confirmed its commitment to continued support of regional networks, international cotton economics conferences and world cotton research conferences. The conference, “Cotton: Engine for Economic Growth, Uzbekistan 2002,” will be held in Tashkent during November 14-16, 2002 in conjunction with a meeting of the Asian Cotton Research and Development Network. An international seminar on cotton price risk management will be conducted by the Secretariat in Burkina Faso during February 17-18, 2003. The World Cotton Research Conference-3 will be held in Cape Town, South Africa from March 9-13, 2003; approximately 250 research papers will be presented.

8. The Committee received a report from its Private Sector Advisory Panel. The PSAP urged that the Committee emphasize the importance of good trading practices in the cotton and cotton textile industries and suggested that the Secretariat investigate how best to encourage adherence to the concept of contract sanctity involving trade in textiles and apparel. The PSAP endorsed efforts to enhance world cotton demand through the activities of the International Forum for Cotton Promotion. The PSAP encouraged governments to develop consumer-oriented cotton quality standards based on instrument based quality evaluation methods. The PSAP recommended that the Secretariat continue to provide education on the subject of cotton price risk management. Member governments 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.

9. The Committee received a report on the activities of the International Forum for Cotton Promotion and agreed that the work of the IFCP is important and should continue. The IFCP is a non-governmental body composed of national and international cotton industry organizations. The purpose of the IFCP is to facilitate the establishment, and to encourage the expansion, of national programs to increase retail level cotton consumption. The Forum serves as a clearinghouse for information about, proven techniques of cotton promotion, best practices in retail level communication, and cost-effective measures of boosting consumer demand.

The Advisory Committee instructed the Standing Committee to consider a proposal to include a cotton promotion specialist on the Secretariat. In considering the proposal, the Standing Committee will carefully evaluate the purpose and objectives of the new position, the budget implications of the proposal, how the addition of a promotion specialist would affect the relationship between the ICAC and the IFCP and other cotton industry bodies, and how the addition of a promotion specialist would affect other work of the Secretariat. The Standing Committee will consult fully with Coordinating Agencies prior to making a final determination on the matter.

10. The ICAC expressed its appreciation to the Common Fund for Commodities 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 ten cotton projects have been approved involving over US\$20 million in grants and loans from the CFC.

11. The 62nd Plenary Meeting of the Committee will be held in Gdansk, Poland during September 7-12, 2003 at the invitation of the Government of Poland. The Committee has accepted an invitation from the Government of Argentina to host the 63rd Plenary Meeting during 2004.

ANNEX I
SUPPLY AND DISTRIBUTION OF COTTON
October 25, 2002

Years Beginning August 1

	1998	1999	2000	2001	2002	2003
	Million Metric Tons					
BEGINNING STOCKS						
WORLD TOTAL	10.238	10.357	9.582	9.219	10.17	8.80
CHINA (MAINLAND)	4.692	4.723	3.412	2.737	2.58	1.88
USA	0.846	0.858	0.852	1.307	1.57	1.46
NET EXPORTERS	2.924	2.814	2.751	3.033	3.68	3.29
NET IMPORTERS 1/	7.314	7.542	6.831	6.186	6.49	5.51
PRODUCTION						
WORLD TOTAL	18.718	19.081	19.444	21.510	19.29	20.16
CHINA (MAINLAND)	4.501	3.829	4.420	5.320	4.65	5.03
USA	3.030	3.694	3.742	4.420	3.93	3.64
INDIA	2.805	2.652	2.380	2.686	2.38	2.67
PAKISTAN	1.494	1.911	1.816	1.802	1.72	1.85
UZBEKISTAN	1.000	1.128	0.975	1.055	1.00	1.04
TURKEY	0.882	0.791	0.880	0.922	0.90	0.91
OTHERS	5.006	5.075	5.231	5.304	4.71	5.02
CONSUMPTION						
WORLD TOTAL	18.672	19.752	19.747	20.167	20.66	20.94
CHINA (MAINLAND)	4.400	4.800	5.050	5.500	5.60	5.68
INDIA	2.781	2.939	2.924	2.907	2.97	3.01
EU, C. EUR. & TURKEY	2.261	2.431	2.367	2.474	2.50	2.51
USA	2.265	2.230	1.929	1.673	1.73	1.70
EAST ASIA & AUSTRALIA	2.003	2.094	2.075	2.055	2.08	2.09
PAKISTAN	1.625	1.700	1.760	1.900	2.00	2.04
BRAZIL	0.797	0.852	0.871	0.860	0.88	0.90
CIS	0.432	0.561	0.661	0.714	0.76	0.82
OTHERS	2.108	2.146	2.110	2.083	2.15	2.20
EXPORTS						
WORLD TOTAL	5.501	6.168	5.922	6.454	6.52	6.47
USA	0.946	1.470	1.472	2.381	2.32	2.34
UZBEKISTAN	0.900	0.893	0.800	0.810	0.74	0.74
CFA ZONE	0.818	0.841	0.718	0.715	1.06	0.93
AUSTRALIA	0.660	0.696	0.849	0.680	0.58	0.56
GREECE	0.285	0.310	0.244	0.290	0.25	0.23
ARGENTINA	0.244	0.079	0.091	0.048	0.02	0.02
CHINA (MAINLAND)	0.148	0.369	0.097	0.075	0.15	0.10
IMPORTS						
WORLD TOTAL	5.414	6.058	5.771	6.193	6.52	6.47
EAST ASIA & AUSTRALIA	1.985	2.053	2.015	2.096	1.98	2.02
EU, C. EUR. & TURKEY	1.367	1.651	1.454	1.595	1.42	1.39
SOUTH AMERICA	0.465	0.527	0.315	0.275	0.43	0.46
CIS	0.243	0.316	0.413	0.413	0.41	0.41
CHINA (MAINLAND)	0.078	0.030	0.052	0.102	0.40	0.60
TRADE IMBALANCE 2/	-0.088	-0.110	-0.151	-0.261	0.00	0.00
STOCKS ADJUSTMENT 3/	0.160	0.007	0.090	-0.130	0.00	0.00
ENDING STOCKS						
WORLD TOTAL	10.357	9.582	9.219	10.172	8.80	8.02
CHINA (MAINLAND)	4.723	3.412	2.737	2.585	1.88	1.73
USA	0.858	0.852	1.307	1.568	1.46	1.07
NET EXPORTERS	2.814	2.751	3.033	3.682	3.29	2.88
NET IMPORTERS 1/	7.542	6.831	6.186	6.489	5.51	5.14
ENDING STOCKS/USE 4/	0.39	0.39	0.44	0.52	0.48	0.44
COTLOOK A INDEX 5/	58.90	52.80	57.20	41.80	53*	57*

¹ Includes Brazil, China (Mainland), Colombia, India, Mexico, Pakistan, 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 projections for 2002/03 and 2003/04 are based on net China (Mainland) trade and world-less-China (Mainland) ending stocks-to-use ratio.

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

Annex II

Government Measures and the World Cotton Industry

Member governments of the ICAC have observed the critical situation that the world cotton industry is going through and wish to provide possible solutions. Our approach to solving the present situation could be a blue print for other commodities currently experiencing similar circumstances. Short-term solutions are not envisaged due to the fact that voluntary measures to restrain production do not seem to be possible. Representatives of the World Bank at the Conference on Cotton and Global Trade Negotiations held in Washington, DC during July 8 and 9, 2002 agreed that it might be possible to work with countries for remedial actions.

Cotton prices averaged US 42 cents per pound in 2001/02, the lowest level in 30 years. The Secretariat estimates that the elimination of subsidies could have a positive impact of US 31 cents per pound on average prices. Low prices are mainly a consequence of political factors that need political actions. For decades, countries have envisioned a free market and the reduction and elimination of subsidies, but these goals can only be achieved by political action.

Countries may wish to consider the following threefold strategy:

- Within the context of the ICAC, it is necessary to develop strategies for the reduction and elimination of subsidies, so that governments can act through their negotiators at the World Trade Organization (WTO).
- Outside the context of the ICAC, governments and the private sector should foster alliances to persuade countries that support farmers through income or price subsidies to reduce and eliminate such measures. It is necessary to show policy makers and the general public the harm that these measures inflict on farmers of other cotton producing countries.
- Countries with short-run difficulties due to low cotton prices may look for solutions within The World Bank and the International Monetary Fund. This could include seeking grants and common funds to help industries survive until negotiations at the WTO are finished, and agreements implemented.

It is necessary for countries to compromise in looking for effective strategies so all parties involved in the solution can agree on the terms. It is suggested that interested countries take a leading role in seeking actions within the WTO. A partnership between governments and the private sector could lead to actions outside the ICAC and the WTO. These actions could be informally planned in forums that countries deem proper.

1. Within the ICAC

1.1 The WTO Timetable

Conclusions from the discussion of government measures at the 61st ICAC Plenary Meeting might be used by governments to table final proposals for the last session on modalities for domestic support scheduled for March 25-31, 2003.

The Working Group on Government Measures of the ICAC (WGGM) may provide additional recommendations before the last WTO meeting in March 2003 and for the WTO Ministerial in Mexico.

1.2 Informal Multilateral Dialogues among Countries

Some participants at the Conference on Cotton and Global Trade Negotiations expressed their intention to have a dialogue among private industries so as to look for amicable solutions to world overproduction triggered by subsidies, and other factors.

In this respect, the ICAC could facilitate informal meetings among domestic cotton industries that wish to look for solutions. It is foreseen that some countries will have the opportunity to review their own paradigms after listening to foreign perspectives, thus having the opportunity to assess the validity of their premises.

This dialogue could be bilateral or multilateral. The Secretariat may be asked to facilitate these dialogues.

2. WTO Actions

The core of the work carried out by the ICAC and its WGGM aims to supply governments with strong economic analysis and data regarding low prices in international markets and the impacts of subsidies. Governments must report on injuries caused by low prices.

There are two approaches: governments may wish to negotiate cotton along with other commodities or propose a single-track treatment segregating cotton from other commodities.

2.1 WTO Negotiations – General Approach

Governments individually or collectively may work within the regular framework of agricultural commodity negotiations, pro-

protecting the special role that cotton has in trade and in developing economies. Groups of countries with cotton interests may table proposals specific to cotton and equate cotton with other commodities.

2.2 WTO Disaggregated Negotiation for Cotton

Governments could propose a negotiation for export subsidies and domestic support on a disaggregated basis, which would result in limits on, and cuts to, export subsidies and domestic supports for each commodity, including cotton.

2.3 Schedules on Reductions of Subsidies

It is suggested that schedules be proposed by each government at the WTO on the reduction of government measures that distort cotton markets and production. It is necessary to start agreeing to commitments.

2.3.1. Basic Commitment – Countries that export cotton must commit to a schedule for reduction and elimination of subsidies, in order to export or participate in international markets. Countries that do not eliminate subsidies or try to circumvent schedules could face retaliation from injured countries on related trade issues, for example, after WTO arbitration awards injured countries may retaliate delaying commitments on schedules for Intellectual Property Rights (TRIPs) for software, pharmaceuticals, phonographs and other sensitive products.

2.3.2. Early harvest (prior to January 2005): 50% reductions on all export subsidies.

2.3.3. 2005: (i) Elimination of all export subsidies, (ii) elimination of price and income support measures; and (iii) elimination of all measures that distort cotton trade and production.

2.4 Dispute Complaints Under WTO Proceedings

Disputes are important tools to achieve recognition of WTO violations and help negotiations where the legal framework falls short. Effective alliances of countries injured by the present situation could help clarify distortions caused by low prices and weaknesses in the WTO legal framework.

Complaints can be presented at the WTO regarding violations of standards on subsidies under the Peace Clause of the Agreement on Agriculture, or after January 1, 2003, under the Agreement on Subsidies and Countervailing Measures.

2.5 Aggregating Cotton and Cotton Textiles and Apparel

It is important to look for ways to accommodate agricultural negotiations on cotton with reductions of tariffs for cotton textiles and apparel, in order to open the market for value-added products.

2.6 Disclosure of Government Subsidies to the WTO

Subsidies that distort production and trade must be disclosed by governments before implementation, and other subsidies must be disclosed every year, so that affected countries have the opportunity to act in a timely manner under WTO proceedings. It has been discouraging for many countries injured by subsidies to learn that government measures are sometimes disclosed to the WTO Secretariat two or three years after implementation.

3. Education on the Source of Subsidies

In general, there is a consensus that subsidies are not a problem that can be solved at the economic level. Subsidies are at the heart of domestic politics. Therefore, countries and injured industries need to implement political actions in order to attack subsidies at the source. Policy makers and the general public in developed countries that subsidize cotton need to be informed of injuries caused by market distortions.

Private industry, non-government organizations (NGOs), and injured countries may organize alliances to educate policy makers and the public in developed countries. Alliances may use media and other means to target audiences with educational programs on injuries and low prices due to subsidies.

4. Special and Differential Treatment for Developing Countries

Many developing countries have expressed their need to enhance the Special and Differential treatment at the WTO. Since the 1980s, developed countries have invested thousands of billions of US dollars in their rural sectors, supporting about 35% of their producer's income, thus acquiring a competitive advantage that developing countries cannot match. Elimination of subsidies and trade barriers that developed countries have for cotton is just the first step in achieving a level playing field for all countries. Therefore, negotiations cannot be matched with symmetric reciprocity from developing countries with few competitive advantages, such as labor, and climate.

Basic Commitment – Cotton dependent countries will have a grace period of five (5) years to start gradual reductions on tariffs and subsidies within a period of ten years.

Inauguration

9:30 AM, Monday October 21, 2002
Mr. Amin Ahmed Abaza in the Chair

The SECRETARY GENERAL introduced Mr. Amin Abaza as Chair of the Inaugural Session. Mr. Abaza is Chairman and Managing Director of Modern Nile Cotton Company and serves as Chair of the Organizing Committee.

The CHAIR welcomed the representative of the Honorable Mr. Youssef Waly, Deputy Prime Minister of Egypt and Minister of Agriculture & Land Reclamation, and invited him to offer welcoming remarks on behalf of Mr. Waly.

The representative of the Deputy Prime Minister said that agriculture is important to the national economy of Egypt, and that cotton provides food and raw material for the economy. He said that the agricultural sector in Egypt is being liberalized from all forms of government intervention. The role of the Ministry of Agriculture is confined to indicative planning. Egypt is aiming to expand production, encourage vertical expansion, rationalize the use of water and pesticides and expand organic production. He noted that Egypt has a long history of involvement with cotton and that the Cotton Research Institute is one of the oldest in the world. The Cotton Research Institute conducts comprehen-

sive research on subjects ranging from agronomy through spinning.

The CHAIR thanked the representative for his remarks on Mr. Waly's behalf.

The CHAIR introduced the Honorable Mr. Youssef Boutros Ghali, Minister of Foreign Trade of Egypt, to make his inaugural remarks.

Mr. Ghali thanked the ICAC Secretariat, members of the Organizing Committee and plenary meeting participants for helping to make the meeting a success. He reported that the cotton industry of Egypt has benefited since 1994 from liberalization. He said that cotton yields and quality have improved, that the number of actors on the domestic market has increased, and that the commitment to foreign markets is greater than before. He said that the private sector accounts for over 65% of exports, and that the expansion in cotton exports is the result of reasonable prices for Egyptian cotton in comparison with competitors. Mr. Ghali said that Egypt was gradually establishing the infrastructure to develop cotton as a product of excellence. He said that cotton was a fiber of the past and that it is a fabric of the future. He noted that Alcotexa and the Ministry of Foreign Trade have cooperated to improve marketing, and their work has re-

sulted in the creation of an Egyptian cotton logo that will distinguish Egyptian products.

Mr. Ghali said that government measures were distorting cotton production and prices. He added that textile industries face restriction left and right. He noted that cotton is the raw material of wealth, and the raw material of industrialization and development. He said that re-establishing free trade in cotton and cotton products will support economic development.

Minister Ghali concluded by expressing the appreciation of Egypt's people and government for the large number of participants in the meeting. He noted that cotton had been part of the history of Egypt for 40 centuries, and he said that cotton will remain a part of Egypt's future for another 40 centuries.

The CHAIR thanked Mr. Ghali for his remarks. Mr. Ghali's remarks are a statement of the meeting.

The CHAIR adjourned the Inaugural Session at 9:45 AM.

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

First Plenary Session

10:30 AM, Monday October 21, 2002
Mr. Amin Ahmed Abaza in the Chair

The CHAIR called the meeting to order and introduced the delegate of Argentina.

The delegate of ARGENTINA said that the Minister of Foreign Trade of Egypt had voiced clearly and succinctly the events in the cotton economy and the harm done by subsidies that distort production and trade. The delegate observed that countries that do not provide subsidies would be unable to produce cotton. He said that a major topic of discussion at the plenary meeting should be how to produce cotton free of interventions. The delegate expressed the appreciation of Argentina for the hospitality of the government and people of Egypt for hosting the meeting. His remarks are a statement of the meeting.

The CHAIR thanked the delegate of Argentina for his remarks and introduced the Chair of the Standing Committee, Mr. Alfonso Liévano, delegate of Colombia, to give his report.

The CHAIR OF THE STANDING COMMITTEE thanked the government of Egypt and the Organizing Committee on behalf of the Standing Committee. He also thanked the Secretariat for their work during the past year. He said that

the economic team of the Secretariat included international leading experts in market analysis. He was highly impressed with the work of the technical information section of the Secretariat and encouraged participation in the World Cotton Research Conference-3 in Cape Town next March. He expressed appreciation for the work of the Secretariat in information technology.

Mr. Liévano said that the ICAC has two key tasks before it: to bring transparency to the market and to facilitate cooperation among member countries. He said that the most outstanding characteristic of the present crisis of low cotton prices is its political nature. He said that within the ICAC talks must be fostered to promote self-discipline in production and marketing. He said governments must participate in WTO negotiations to eliminate subsidies and barriers that distort markets. He encouraged public education campaigns in countries that subsidize cotton production to create increased awareness of the harm being done.

Mr. Liévano thanked other officers of the Standing Committee for their support during the past year. He endorsed the recommendation of the Standing Committee that Mr. Ajai Malhotra of India be elected Chair of the Standing Commit-

tee, Ms. Obi-Nnadozie of Nigeria be elected First Vice Chair and Mr. Luc Devolder of Belgium be elected Second Vice Chair. He also acknowledged the work of Mr. Neal Gillen who serves as the representative of the ICAC Secretariat at UNCITRAL meetings, and he thanked many speakers who made presentations during Standing Committee meetings.

Mr. Liévano suggested that the Committee consider the incorporation of a marketing specialist into the Secretariat in order to support the work of the International Forum for Cotton Promotion.

The Report of the Chair of the Standing Committee is attached.

The CHAIR thanked Mr. Liévano for his report and introduced Mr. Terry Townsend, Secretary General, to give the Report of the Executive Director.

The SECRETARY GENERAL said that the world cotton industry has the option of negotiating toward win-win solutions to modern challenges if all segments of the industry recognize the mutual benefits to be achieved through measures to enhance the demand for cotton, through the adoption of appropriate new technologies and through the support of a successful outcome to

the talks on agriculture being conducted under the auspices of the World Trade Organization.

Mr. Townsend said that the mission of the ICAC is to assist governments in fostering a profitable and healthy world cotton industry. He said the Committee serves as a catalyst for cooperative action by governments and industry segments in the pursuit of goals that are broadly shared. The role of the ICAC is to raise awareness, disseminate information and to facilitate cooperation. He said the purpose of a plenary meeting is to meet and move forward through agreements to cooperate and improve.

Mr. Townsend thanked Alcotexa and the government of Egypt for their efforts in preparing for the meeting and for their hospitality. He thanked the industry sponsors who, by supporting the plenary meeting, are contributing to industry success. He said that strong efforts are already underway in Poland to host the 62nd Plenary Meeting in 2003.

The SECRETARY GENERAL welcomed delegates from non-member countries who were participating as observers. He said that membership provides tangible benefits, and he hoped that observer countries would consider joining the Committee. Mr. Townsend also acknowledged the work of the Standing Committee and its officers this past year. He said Mr. Liévano, Mr. Malhotra, and Ms. Obi-Nnadozie deserve much credit for their work and for the achievements of the Working Group on Government Measures. He also thanked Mr. Felix Stieghardt who serves as Chair of the Private Sector Advisory Panel.

The Report of the Executive Director is attached.

The CHAIR thanked Mr. Townsend for his report and introduced Mr. Richard Hughes, Textiles Division, World Trade Organization.

Mr. Hughes said he was pleased to be able to represent the WTO Secretariat before the 61st Plenary Meeting of the ICAC. He said that he wished to give a status report on developments in the implementation of the Agreement on Textiles and Clothing, and he wished to review progress in the negotiations on the Agreement on Agriculture.

Regarding the Agreement on Textiles and Clothing, he noted that a large share of the textile and clothing exports from developing to developed countries have been subject to quotas for approximately forty years. He said that the Agreement on Textiles and Clothing is the vehicle through which these quotas are being removed, and that by 31st December 2004, all of the bilateral quotas will be eliminated and textiles and clothing trade will be governed by normal market forces and supported by the WTO rules. He said there is every reason to believe that the quotas will be eliminated as agreed. He noted that changes in textile trade flows after 2004 are most likely to be evolutionary in nature because coun-

tries are already adjusting to a market without quotas. Not only are manufacturers being required to increase their efficiency in every aspect of production and marketing, but also governments are putting in place policies that are "user friendly," to assist their manufactures to compete globally.

He said that the rapid growth of exports from China (Mainland), partially offset by declines in exports from other Asian countries, was the most significant development in textile and apparel trade in recent years. He said the European Union, the United States and Canada have recently adopted programs that should encourage increases in clothing exports by the least-developed countries. He said that with the removal of textile and apparel quotas, there is every reason to believe that textiles and clothing production and trade will grow overall, but that there will be continued shifts among trading countries.

Regarding the Agreement on Agriculture, Mr. Hughes noted that the ICAC put a great deal of effort into assisting its members in both identifying and responding to the distortions in global cotton production and trade as a result of measures taken by some governments to assist their domestic agricultural sectors. He said that the Conference on Cotton and Global Trade Negotiations held during July 2002 was a big step forward in increasing awareness of the problems and distortions that exist in cotton trade as a result of domestic supports and high textile and apparel tariffs.

Mr. Hughes said that negotiations to liberalize agricultural markets are a recent development, and agriculture was first brought within the multilateral trading system only through the Uruguay Round of trade talks that ended in 1994. The specific obligations implemented since 1995 include: (1) developed countries agreed to reduce their agricultural tariffs by 36% over six years and developing countries accepted to reduce theirs by 24% over ten years; (2) it was agreed that domestic support programs of the developed countries would be reduced by 20% in six equal installments and by 13% over ten years by developing countries; and (3) export subsidies had to be reduced by 21% in volume and 36% in value over six years by developed countries and by 14% in volume and 24% in value by developing countries over ten years.

Mr. Hughes explained that these first undertakings from the Uruguay Round were a major leap forward, even though from the outset they were seen as only a first step in a longer process of reform. Negotiators wrote into the Agriculture Agreement a provision (Article 20) that committed WTO members to begin new efforts at further reform at the beginning of 2000. He said the Declaration made by Ministers in launching the Doha Development Round in 2001 went even further, making the objectives on agriculture

more explicit and setting deadlines for achieving further reductions in 1) tariffs, 2) domestic support, and 3) export subsidies.

Mr. Hughes explained that the first phase of the current negotiations, from March 2000 to March 2001, required WTO member countries to submit proposals for further market reform. He noted that in the first phase, proposals were received from 121 countries, or 85% of the WTO's membership, meaning that an unprecedented number of developing countries are participating in the talks on agriculture. In the second phase, from March 2001 to March 2002, each of the topics raised in the proposals was examined in detail. The proposals included matters such as food security, food safety, rural development, geographical indications, environment concerns, food aid, and special treatment for developing countries, in addition to the subjects of domestic support, market access and export subsidies.

He said that the third stage of negotiations runs from March 2002 to March 2003, leading up to the Fifth Ministerial Conference in Cancun, Mexico in September 2003. In the third phase, the proposals from the first two phases have to be translated into precise technical detail. For instance, if domestic subsidies are to be reduced "substantially," exactly how much does that mean, and precisely which domestic supports are to be reduced or removed? Mr. Hughes said that by the end of 2002, countries' positions are to be written into a draft overview document that will be the basis for intensive negotiations in early 2003. The negotiations over the overview document are to be complete by 31 March 2003 and will include a set of "modalities" or formulas for achieving further liberalization. These modalities will include numerical targets for achieving the mandate given by the Ministers in Doha.

Mr. Hughes went on to explain that the modalities agreed to in March 2003 will then be used by countries to produce their own offers of comprehensive draft commitments which they must present by the time of the Fifth Ministerial Conference in September 2003. The full process of negotiations must reach a conclusion by 1st January 2005 and form part of the final outcome of the Doha Development Round.

Mr. Hughes observed that the negotiations on agriculture are rapidly approaching a time when critical decisions must be made. He pointed out that WTO member governments, not the WTO Secretariat, carry out all negotiations. Therefore, participants in the ICAC plenary meeting must take steps to ensure that the negotiating policies of their governments fully reflect the concerns and objectives of the cotton sector. Governments must also ensure that regional groupings to which they belong carry forward the concerns and interests of the cotton sector in the overall negotiating process. He said that the ICAC has

helped to raise the profile of cotton in the WTO negotiations through its studies and the July 2002 conference. Now, intensified efforts by the ICAC and its individual members to advance the objectives of cotton through national negotiating positions must be made. Mr. Hughes' presentation is a statement of the meeting.

The CHAIR thanked Mr. Hughes for his report and introduced Mr. David Hallam, Commodities and Trade Division, Food and Agriculture Organization of the United Nations.

Mr. Hallam thanked the Chair and delegates for the opportunity to address the plenary meeting. He noted that there are more than 200 million farmers and workers worldwide who are employed in cotton production, marketing and processing and nearly one billion people who rely on cotton for their livelihoods. He reported on ways that FAO is involved in efforts to improve cotton farmers' food security through both technical and economic programs, including technology transfer for integrated pest management, control of the boll weevil, and participation in the world Cotton Biotechnology Group. He said that the work of the Commodities and Trade Division includes monitoring commodity markets, economic analyses on commodity issues and studies of market prospects for commodities, including cotton. He noted that there is substantial cooperation between the ICAC and FAO secretariats. He also reported that the FAO provides considerable assistance to developing countries preparing for multilateral trade negotiation through studies, analysis and training. He said that FAO would continue to assist countries to build their capacity to implement existing agreements and to participate in new negotiations. [Mr. Hallam conducted a workshop during the plenary meeting on Friday on "Multilateral Trade Negotiations: Resources Available from FAO."]

Mr. Hallam reported that FAO provides technical assistance to organizers of international cotton conferences, including conferences in China (Mainland) in 1999 and 2001. He said a third conference is being planned for mid-2003. He reported that cotton and other commodities faced considerable challenges caused by low prices in recent years. FAO conducted an expert consultation on developments in agricultural commodity prices in 2002. The consultation addressed the factors underlying the declines in commodity prices, the implications of low prices for developing countries and possible actions to redress low commodity prices. He said that the experts who participated in the consultation agreed that adoption of new technologies, vertical diversification and the adoption of national and international policies that distort markets and inhibit trade were measures that could be employed to combat the effects of low prices. He said another consultation is being planned for March 2003 in Rome.

Mr. Hallam reported on progress toward completion of the World Apparel Fibre Consumption Survey with the ICAC. He pledged that FAO will continue to work with member countries and international organizations, particularly the ICAC, to improve the profitability of cotton production. Mr. Hallam's presentation is a statement of the meeting.

The CHAIR thanked Mr. Hallam for his remarks.

Seeing no other business, the CHAIR adjourned the First Plenary Session at 12:20 PM.

ATTACHMENTS

Report of the Chairman of the Standing Committee

Alfonso Liévano
Colombia

On behalf of the Standing Committee, I should like to congratulate the Government of Egypt and the Organizing Committee for the excellent planning and execution of this plenary. I know that Mr. Amin Abaza, Chairman of the Organizing Committee, and Mr. Nabil El Marsafawy, Board Chairman of the Trade Holding Company, and everyone in Egypt, have spared no effort in ensuring its success.

The theme for this year, *The 21st Century Cotton Industry: Growth Through Private Investment*, is indicative of the important challenges we have before us. We have come together here, in Egypt, this ancient center of culture, to discuss subjects of common interest for our industry. Here, in the protective shade of the pyramids and amid the human warmth of Cairo, we are meeting like a family, as in all our plenaries, to find the common denominator of our interests and thereby ensure the future of the cotton industry.

Undoubtedly, today the International Cotton Advisory Committee has two key tasks before it: first, to bring transparency to the market, and second, to facilitate cooperation among the member countries in connection with the cotton market.

The industry must not be deprived of US\$14.5 billion in a single harvest or US\$35 billion over four consecutive harvests because the market is distorted by government measures. On the other hand, the industry cannot continue with the growth rate of the last ten years, a mere 8%, while the competition grew 160%. The situation is a difficult one, but there must be something good about cotton for it to have withstood these circumstances. I believe that it is thanks to the consumer that the industry is surviving, but there must be an in-depth review and, if necessary, a change of paradigm in order to ensure the continuity of the industry.

It was my honor to chair the Standing Committee and head the Working Group on Government Measures (WGGM) this year, a year that will go down as a milestone in the history of ICAC thanks to the efforts of my predecessors, who were able to endow our Secretariat with a role of leadership and service. This achievement would not have been possible without the proactive cooperation of the executive director Terry Townsend and the economic team made up by Carlos Valderrama, Gérald Estur and Andrei Guitchounts. This team has been working on a review of the economic status of the industry and it is thanks to them that we are in a position to know where we are coming from and where we are headed. ICAC has become a leading international organization thanks to its precise market analyses and forecasts, its knowledge of the industry and the studies it has carried out. Here allow me to paraphrase Churchill, "Never have so many owed so much to so few."

For his part, Mr. Rafiq Chaudhry, at the head of the Technical Information Section has been stepping up the Committee's scientific and technical activity, as reflected in more than ten projects financed by the Common Fund for Commodities and other agencies at a cost of over US\$55 million. These studies have directly or indirectly benefited all the member countries. For example, at the hard-science end, we have the study done on the genetic code of the cotton *Geminivirus*, a pest whose vector is the whitefly. This study, run by the Universities of Tucson and Pakistan, is aimed at employing traditional hybridization together with biogenetics to develop a resistant plant strain. At the other end, we have the study done in cooperation with the government of India to process cotton stalks as a wood substitute in the production of building materials. This gives us an idea of the importance and versatility of the Technical Information Section of ICAC, and the organization's leadership role on the international plane.

For example, last year witnessed the conclusion of the study of sticky cotton and the debate at the Victoria Falls plenary produced an array of excellent suggestions. However, this is today and will continue to be a challenge for the industry, one whose solution might be facilitated by ICAC, possibly through the use of certified cotton.

To share with you the background on how this issue of sticky cotton came to my attention, I would like to refer to the successful initiative undertaken by the Secretariat to take advantage of the proximity of ICAC headquarters in Washington DC to both, plantations and industrial facilities, to inform the delegates of the Standing Committee on the main aspects of the cotton industry in the United States. That initiative was made possible thanks to the good will of our hosts, the cotton industry and the government of the United States. Our first trip was to

the World Trade Center, later tragically demolished, where we witnessed the operation of the futures' market. Last year we visited the growing region of Southern Virginia, where we saw several plantations, met with their owners and visited a ginning facility.

My remarks on sticky cotton were motivated by this year's visit to the Dan River Cotton Company in Virginia. We visited its excellent spinning and weaving facilities and after the factory visit, in a round table discussion with cotton buyer Mark Tapp, who purchases some 22,000 tons a year, we had an opportunity to analyze some of the problems affecting cotton, such as stickiness, caused by insects. Mr. Tapp explained that synthetic fibers do not cause difficulties in the spinning and weaving operations, while cotton lint often causes machine downtime due to defects such as stickiness in the lint.

We are convinced that this is a critical issue if we hope to hold our own against synthetic fibers.

If the case so demands, we will have to follow the example of organic products and make certain that sticky cotton is segregated all the way down the line from the farm through the looms. ICAC's technological decision-makers must take up that challenge, and the organization must also facilitate the establishment of standards and processes. This is not a new problem, but I insist that it is a crucial question for the future. If you take a look at the web page of the cotton market in Bremen, you will find an excellent picture of sticky cotton. Mr. Tapp reported that in some batches contaminated with sticky cotton they have had to mix in one part sticky cotton and thirty parts non-sticky cotton to avoid difficulties in the spinning and weaving operations.

Curiously enough, the ratio of cotton market growth to synthetic fiber market growth is one to twenty (8% to 160%). This suggests that we can still continue to lose momentum in the market until we are down to the ratio that is safe for spinners and weavers, i.e., one to thirty. If that should happen, our market share would amount to 3.33% and our only growth would be as a result of the growth of the world's population. Turning that trend around will require an effort by the entire industry to overcome the technical difficulties, improve processes and recover our markets.

To conclude now with the subjects brought up by Dr. Chaudhry, I would like to invite the member countries, as well as the non-members, to participate in the World Cotton Research Conference that is to be held in March of next year and which will bring together the most distinguished technical and scientific personalities of the industry. I would also like to reiterate that it is my conviction that the survival of cotton against the synthetic fibers is going to require a

good deal of well applied science to be able to overcome the factors that limit our ability to compete, such as sticky cotton and uniform fiber length.

Manager of information systems John Mulligan has spearheaded the updating of ICAC's Internet facilities. Today, ICAC's web page provides permanent access to its data bank and its information center, in some cases with payment of a modest fee, and free of charge for the government agencies of the member countries. Thanks to ICAC's information systems, we were able to push forward activities such as the Expert Panel on Biotechnology in Cotton in the past and the deliberations of the WGGM this year. We would like to develop the full potential of ICAC's information and communications capabilities; that is why we must find a way to set up chat rooms to facilitate an ongoing dialogue within the industry — scientific, economic, business or social. The intention is not to replace personal contacts but to use this medium to enrich relations among all the actors in the industry.

Aside from its normal functions, this year the Secretariat was the organizing force behind the Conference on Cotton and Global Trade Negotiations, which was sponsored in conjunction with the World Bank. I want to congratulate our executive director, Mr. Terry Townsend, and our senior economist, Carlos Valderrama, who deployed all of their organizational and thematic capabilities in support of the conference, one that will mark a turning point in the history of ICAC, not only for the quality of the participants but also for its outcome. Thank you very much.

Many of you attended the Conference on Cotton and Global Trade Negotiations, where you received a first-hand impression of its achievements. The Conference heard a number of suggestions on how to reduce and eventually eliminate government measures that distort cotton production and trade. On the one hand, a distinction was made between cotton and other agricultural commodities; on the other, officials of the World Bank suggested it might be possible to provide short- and medium-term support for cotton-dependent countries by structuring funds and channeling resources to overcome the present crisis and allow time for the World Trade Organization to conclude its negotiations on agriculture and then bring about the implementation of the agreements stemming from it.

The most outstanding characteristic of the present crisis is its political nature. That is why the WTO negotiations must be backed with political instruments in several fields: (i) in ICAC's field of action, talks must be fostered among the different national cotton production industries in order to promote the establishment of self-

discipline in production and marketing and support the advancement of cotton in all markets; (ii) governments must join efforts in the WTO negotiations to level the playing field for all actors at the marketing end of the industry by eliminating the subsidies and barriers that distort markets and, if necessary, they must turn to dispute settlement mechanisms to solve existing differences and identify and correct the legal shortcomings of WTO; (iii) foster campaigns in those countries that subsidize cotton production to create an awareness in their political leaders and the general public about the harm that these practices do to countries that do not subsidize. Such a campaign might be accompanied by aggressive advertising mechanisms, such as the use of logos and slogans, to accelerate the learning process, if the countries and industrial alliances that consider it convenient decide to take this road. But we shall have time enough for these subjects in future debates. The Standing Committee wants to thank the World Bank for the opportunity it provided the cotton industry by hosting the Conference and, especially, by taking part in the search for solutions.

Another important highlight of the year was the special cooperation of Mr. Ajai Malhotra, of India, our first Vice-Chair, and Mrs. Chigozie Obi-Nnadozie, of Nigeria, our Second Vice-Chair. The future leadership of the Standing Committee and the Working Groups will be in their hands; they have our complete confidence and support and we wish them success. I would also like to express my appreciation for the cooperation provided by Mr. James Johnson, assistant delegate of the United States and Chairman of the Subcommittee on Budget, who together with a number of other delegates, helped the Standing Committee through the approval of financial statements and the ICAC budget. I must also mention the cooperation of Mr. Hsinhua (James) Wu, delegate of China (Taiwan) and Chairman of the Nominating Committee.

I should highlight the cooperation of associations and persons who, in collaboration with ICAC, have been contributing to the common good of the industry. Outstanding among them are Mr. Neal P. Gillen, of the American Cotton Shippers Association, who, at his own expense, represented the ICAC Secretariat at the meeting of the United Nations Commission on International Trade Law (UNCITRAL) on trade contracts. Equally significant were the presentations made by Professor Don Wallace, President of the International Law Institute, Washington DC, and Professor of Law at Georgetown University, who lectured the Standing Committee on arbitration and electronic commerce. ICAC has been supporting the drive by CICC (Committee for International Cooperation between Cotton Associations) to foster respect for commercial contracts and promote among our members the advantages of the New York Convention,

which provides for international arbitration as the ideal mechanism for the settlement of trade disputes. In this connection, we would like to congratulate Brazil for its ratification of the Convention last April, thereby joining the majority of our member countries who have done so and facilitating commerce and its best practices.

We cannot omit mentioning the participation of Dr. Josette Lewis, of the United States Agency for International Development (USAID), who enlightened the Standing Committee on the advances of biotechnology and the way that governments have been adapting their monitoring and control agencies to regulate the development and use of this instrument to protect persons, animals, plants and the environment in general. She offered interested countries the agency's services to help improve control, monitoring and risk evaluation standards in connection with the new genetic technology.

In sum, if we are to ensure the future of the cotton industry, ICAC must provide support for both governments and industry in two fields: first, in the establishment of a market economy free of distortions, and second, in promoting cotton sales. On the one hand, we have seen how the synthetic fiber market has grown by 160%, as opposed to 8% growth of the cotton market. I ask myself, and I ask you, what is it we are not doing?

With regard to market distortions, the WGGM must continue to deliberate on the negotiation processes in WTO and, subsequently, on the implementation of the agreements. The WGGM may continue to operate with its present system, improving its use of the Internet and making other minor reforms.

In connection with market promotion, the ICAC facilitated the launching of the International Forum for Cotton Promotion, made up by national cotton organizations, whose results will soon become apparent. I am convinced, however, that ICAC is called upon to assume an even more prominent leadership role. We may possibly have to consider the incorporation of a marketing specialist into the Secretariat in order to define a new paradigm for cotton. That person will have to work closely with the Technical Information Section to launch new processes and improve existing ones. I am recommending, in fact, that we enhance the Secretariat roster with the addition of a marketing specialist who will be in charge of coordinating the efforts being deployed by the industry and ICAC to facilitate the recovery of our markets. All of our countries will be called upon to make financial contributions as an investment in the future, after due consideration and recommendation by the plenary. This way we will increase the chances for cotton products to preserve their permanence in the world's markets.

To implement the theme of this plenary, "The 21st Century Cotton Industry: Growth Through Private Investment," allow me to suggest the establishment of another working group, whose mandate will consist in leading the promotion, marketing and enhancement of production processes in the cotton industry and advising the Standing Committee and the Plenary on these goals. In other words, this group would be entrusted with working out a new paradigm to share in market growth with synthetic fibers. It would rely on Internet for communications and would eventually use the projected ICAC chat room. This would facilitate a direct and economical exchange of ideas and views. Once market trends are transformed, increased private investment will become a reality. For the time being, we shall continue to witness investment flows from one country to another.

With regards to the practical application of these new media, it would be of great importance to examine how the Secretariat could provide translation services – with certain restrictions – to facilitate communications among the members of the various working groups in situations whose significance warrants it, thereby fostering greater involvement and richer contributions by all actors in the cotton industry.

The Standing Committee recommends Mr. Ajai Malhotra, of India, Ms. Chigozie Obi-Nnadozie, of Nigeria, and Mr. Luc Devolder, of Belgium, for the posts of Chair, First Vice Chair and Second Vice Chair of the Standing Committee. I have no doubt that the industry will score great successes and attain significant achievements with this new Executive Board, whose members enjoy the unanimous support of the Standing Committee.

I thank the plenary for the duties it entrusted to me in Victoria Falls, Zimbabwe. Chairing the Standing Committee has been both a privilege and a challenge for me, as well as an opportunity to contribute to the progress of the world cotton market. I would like to express my appreciation for your support, the support of the Secretariat, the members of the Standing Committee and of the WGGM. Thank you very much.

Lastly, I would like to thank, on behalf of the Standing Committee and in my personal behalf, the Government of Egypt, the Organizing Committee, the governments represented here, the international agencies present, the observer countries and all the participants for attending this event. I can safely say that the decisions issued from this plenary will serve the interests of your peoples and your industries. Once again I thank you for your attention and your confidence.

Report of the Executive Director

Terry P. Townsend

Getting to Yes

In 1983, Roger Fisher and William Ury wrote a book, "Getting to Yes: Negotiating Agreement Without Giving In." The book popularized the concept of win-win negotiations based on the premise that there are possibilities in every situation to add value in reaching compromises that result in increased welfare for all sides. Economics teaches that win-win situations occur in transparent markets free of distortions caused by government measures. The world cotton industry has the option of negotiating toward win-win solutions to modern challenges if all segments of the industry recognize the mutual benefits to be achieved through measures to enhance the demand for cotton, through the adoption of appropriate new technologies and through the support of a successful outcome to the talks on agriculture being conducted under the auspices of the World Trade Organization (WTO).

The world cotton industry faces many challenges, including low prices, weak growth in demand, refinements in textile machinery that require higher quality cotton, environmental concerns, resource constraints and distortions to production caused by government measures. The industry is in the midst of a prolonged change in prices as significant as the shift in the early 1970s when cotton prices doubled, only this time prices are shifting lower. Year-to-year changes in cotton production are determined by marginal production costs, not by average or total costs. Therefore, cotton prices tend toward the marginal costs of the most efficient producers, and marginal costs are falling to 50 cents per pound of lint or less because of the development of new cotton areas and advances in technology that are resulting in rising yields. The consequence is higher world production at each price level, resulting in lower average prices compared with the 1970s, 1980s and 1990s, and season averages of the Cotlook A Index are likely to be between 50 and 60 U.S. cents per pound most years this decade, 10 to 20 cents per pound lower than the average of the last thirty years.

Retail level demand for cotton is rising, but only because cotton prices are below average, thus triggering the substitution of cotton for polyester; unfortunately, the fundamental or underlying demand for cotton linked to rising incomes and shifts in consumer preference in favor of cotton is not strengthening. Cotton quality is improving, and technology to measure intrinsic quality parameters is expanding. The cotton industry needs to continue to adjust its marketing systems to incorporate new technology to better meet the demands of consumers. In too many countries, barriers exist to private sector invest-

ment and expansion, thus limiting the potential for growth in the cotton sector.

While all challenges are important, perhaps none is timelier this year than the challenge of developing a constructive approach to the problem of distortions to cotton production caused by government measures. The harm done to small-holders and rural households in developing countries by the decline in cotton prices during 2001/02 was eloquently described during the *Conference on Cotton and Global Trade Negotiations* in Washington in July 2002. Mr. François Traoré of Burkina Faso told how income from cotton improves the lives of two million people in his country alone, providing money for school fees for children, transportation and health care for families, and the means to repair machinery and improve homes. For farmers in Burkina Faso, government measures that insulate farmers in larger countries from variations in cotton prices—and thus force the burden of adjustment to low prices entirely on producers in countries that do not provide subsidies—can contribute to impoverishment.

But the needs of producers in developed countries were also eloquently explained during the Conference. Cotton is important to the history and culture of many countries, and cotton production is important to the farmers who grow it in both developed and developing countries. Within the developed producing countries, cotton farming tends to occur in lower-income regions, often in areas where economic alternatives are not attractive. Even though direct benefits under government programs tend to go disproportionately to the largest growers, the impact of farm spending on the regional economies of low-income areas is substantial.

The need to support rural households while ensuring that government measures do not result in overproduction of cotton, and the need to expand demand enhancement activities by national organizations in cotton producing countries might provide the basis for a win-win compromise in the world cotton industry. Empirical evidence from the U.S. demonstrates conclusively that consumers' tastes and preferences can be affected by promotion activities, and that the demand for cotton can be increased.

The U.S. industry and government invest millions of dollars per year in domestic and international generic cotton market development efforts, and these efforts, begun in the 1950s, are boosting world demand for cotton. As Bernard Hoekman, Research Manager for International Trade, The World Bank, noted during the Conference in July, the WTO process involves tradeoffs and hard bargaining. There is scope for a win-win compromise in cotton resulting in increased wealth for all producers and spinners if there is a successful outcome to the talks on agriculture in the WTO resulting in reduced distortions in the cotton market, and if there are

also vigorous and tangible efforts by other producing countries to boost demand for cotton.

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 goals that are broadly shared. The role of the ICAC is to raise awareness, disseminate information and to facilitate cooperation.

The theme of the 61st Plenary Meeting is *The 21st Century Cotton Industry: Growth Through Private Investment*. This theme will showcase developments and progress by the cotton sector in Egypt since 1994, and will provide a suitable platform to continue discussions from the meeting in Zimbabwe in 2001. There are four major topics that will receive emphasis this week, and our broad objective is to expand understanding and cooperation in these areas: *Encouraging Investment in the Cotton Industry*, *Providing Incentives for Improved Cotton Quality Through Measurement of Intrinsic Values*, *Government Measures*, and *Technology, Management and Processing for Quality Fiber*. In addition, the International Forum for Cotton Promotion (IFCP) will conduct a workshop on cotton promotion and there will be breakout sessions on *Encouraging Adherence to the New York Convention* and on *Price Risk Management Techniques*.

Encouraging Investment

The First Open Session on *Encouraging Investment in the Cotton Industry* will emphasize the theme of the meeting and follows from an instruction from the 60th Plenary Meeting in Victoria Falls to provide guidance on sound industrial policies and eliminating barriers to investment. The purpose of the session is to develop recommendations for governments for policies and programs that should be implemented to encourage increased investment in cotton production and processing. The specific objective is to build on the suggestion from Victoria Falls that governments should reduce import barriers to equipment used in cotton production and processing.

Incentives for Improved Quality

The Second Open Session will be on the subject of *Providing Incentives for Improved Cotton Quality Through Measurement of Intrinsic Values*. The world textile economy is consumer-driven, and competitive pressures force spinners to meet consumer preferences for reductions in real prices and improvements in product quality. Success for the cotton industry in competition with chemical fibers depends on meeting consumer demands. The cotton industry requires quality evaluation systems that provide incentives for improved cotton quality based on in-

struments that measure the intrinsic characteristics of cotton valued by the spinning industry.

The objective of the Second Open Session will be to provide guidance to governments and industry organizations on how these evaluation systems can be designed. If successful, the implementation of spinning-oriented quality evaluation systems could enable market forces to provide rational incentives to the entire cotton production, ginning and sales pipeline, to produce cotton with the characteristics that would better enable cotton spinners to meet the demands of quality and price-conscious consumers.

Government Measures

At the 60th Plenary Meeting last year in Victoria Falls, the Advisory Committee authorized the creation of a Working Group on Government Measures (WGGM) chaired by the Chair of the Standing Committee to look for solutions to the problems caused by government measures.

Under the auspices of the WGGM, the ICAC cosponsored with The World Bank the Conference on Cotton and Global Trade Negotiations. More than 200 persons from forty-five countries and seven international organizations participated in the Conference. The purpose of the Conference was to encourage a successful outcome to the negotiations on agriculture being conducted under the auspices of the WTO. The objectives of the conference were to raise awareness of the importance of cotton to the world economy and to emphasize that distortions in the cotton market are caused not only by export subsidies and limits to market access, but also by production subsidies.

There were four major conclusions from the Conference:

- First, cotton was recognized as an important agricultural commodity. According to information provided by the Food and Agriculture Organization (FAO), more than 100 million farming units are engaged directly in cotton production. When family labor, hired on-farm labor, and workers in ancillary services such as transportation and ginning are considered, total involvement in the cotton sector reaches one billion people. Evidence was presented at the Conference showing that cotton cultivation contributes to food security and improved life expectancy in rural areas of developing countries.
- Secondly, the cotton market is highly distorted. Fourteen countries representing three-fourths of world cotton production administer direct income and price support programs for cotton growers. As noted in the Conference, these government measures result in higher production of cotton and force the burden of adjustment to low cotton prices onto growers in countries that do not provide similar measures of protection.

- Third, there are practical and effective measures that can be implemented in producing countries that will help to offset the impacts of low cotton prices. Countries can continue efforts to improve productivity and to raise levels of efficiency in cotton processing and marketing. The importance of market development activities organized by the private sectors of cotton producing countries was noted.
- And fourth, the venue for the negotiation of reductions in government measures that distort cotton production and trade is the World Trade Organization (WTO). As noted by a representative from Brazil, "The WTO is the sum of the countries that participate in it." In order to advance the interests of agricultural trade liberalization, countries must unify and work effectively to articulate a positive program of mutual benefit within the talks on agriculture being conducted under the auspices of the WTO.

The Standing Committee has put forward a proposal from the WGGM based on information from the Conference in July. The proposal is contained in Working Paper I 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.

Technical Seminar

The meeting of the Committee on Cotton Production Research will be held on Thursday on the topic of *Technology, Management and Processing for Quality Fiber*. Twelve speakers from ten countries will discuss their first-hand experiences about how research, management and new technologies affect fiber quality. Speakers from countries with high yields, researchers with experience achieving high cotton yields without the use of pesticides and researchers with experience using biotechnology in current breeding practices will share their success stories.

The measurement of cotton quality is challenging, and improvements in fiber quality measurement are required by the spinning industry. Experts from Egypt, Greece and Poland will discuss how fiber testing methods and cotton classing and grading systems can be improved to bring reliability and harmony in international fiber quality data. The government of India has recently invested heavily to upgrade cotton quality, and a report from India will discuss their new approaches.

Work of the Secretariat

The Secretariat is engaged in a long list of projects. Most delegates are at least generally aware that the Secretariat provides daily, monthly and annual statistical reports on the world cotton situation, monthly reports on sup-

ply and demand of extra-fine cotton and cotton export commitments, and annual reports on government measures, supply by type, the demand for cotton, the structure of trade and developments with e-commerce. There are also quarterly technical reports on cotton research.

The Secretariat helped to organize regional network meetings, and assisted with preparation of the agenda and organization of the World Cotton Research Conference – 3 (WCRC-3). The World Cotton Research Conference-3 will be held in Cape Town, South Africa from March 9-13, 2003. The ICAC Secretariat is working with the Local Organizing Committee to bring maxifunded by the Common Fund for Commodities (CFC) to produce a dictionary of Cotton Facts, and the Secretariat served as the Supervisory Body for CFC projects involving control of bollworm in Asia and Africa, a price risk management project in East and Southern Africa, and a warehouse receipts project in East and Southern Africa. In addition, the Secretariat assisted coordinating agencies in preparing project proposals for the Common Fund for a paperboard factory in India, the identification of cotton diseases in East and Southern Africa and a project to enhance the private sector delivery of inputs in West Africa.

Using resources from the business plan, the Secretariat is coordinating work with the FAO to measure retail level fiber consumption by country, and that report will be finished at the end of 2002. The Secretariat is editing a cotton-trading manual that will be published in 2003.

The Secretariat Web site was improved in April 2002, making it easier to navigate the site. Additional educational content was added. The Secretariat also developed a new database to automate subscription sales and to reduce the labor involved in document distribution.

The Secretariat is competent, productive and committed to service. The role of the Committee is being enhanced, from one primarily of providing information to an increasingly activist role as a catalyst for cooperation action. The Secretariat is under pressure to be more productive and entrepreneurial and is adapting well to the change in culture required by these challenges.

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 Organizing Committee has worked with the Secretariat and the Standing Committee to orient the agenda of this 61st Meeting to focus on matters of broad concern to all segments of the world industry. It is a pleasure to be able to thank the

members of ALCOTEXA and the Government of Egypt for their efforts in preparing for this meeting and for their hospitality. The cotton industry of Egypt has made major strides toward increased efficiency in recent years, and it is highly appropriate that we meet here this year.

We don't usually look backwards, but last year was exceptional, and I want to recognize again the work of the cotton industry of Zimbabwe in hosting the successful plenary meeting in 2001. The host organization overcame difficult economic conditions, the destruction of the venue hotel two months before the scheduled start of the meeting and the disruptions caused by the terrorist attacks in the USA last September. Through ingenuity, management expertise, and effort the cotton industry of Zimbabwe hosted an excellent meeting and set the stage for progress this year.

Looking ahead, a strong effort is already underway in Poland to host the 62nd Plenary Meeting in 2003. Poland formed a host organization in 2001 and has been actively preparing for next year. The historic city of Gdansk will serve as a beautiful northern location on the Baltic Sea for the first ICAC plenary meeting in Central Europe, and the Gdynia Cotton Association has much experience hosting cotton industry conferences.

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.

Standing Committee

I want to acknowledge the work of the Standing Committee this past year. The Standing Committee monitored the work of the Working Group on Government Measures and developed the proposals on government measures contained in Working Paper I. The Standing Committee shaped the priorities reflected in the agenda of this plenary meeting 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 work-

ing well together. The Standing Committee, and its officers this past year, Mr. Liévano, Mr. Malhotra, and Ms. Obi-Nnadozie, deserve much credit for their work. I also want to thank Mr. Felix Stiegwardt who serves as Chair of the Private Sector Advisory Panel. The PSAP 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 ten cotton projects involving over \$20 million in grants and loans. A marketing project and a price risk management project

are underway in East Africa. 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 61st Plenary Meeting.

Second Plenary Session

1:45 PM, Monday October 21, 2002
Mr. Galal El Rifai in the CHAIR

The CHAIR introduced Mr. Gerald Estur, statistician of the Secretariat, to present the outlook for cotton supply and use. Mr. Estur reported that the 2001/02 season was exceptional in the history of the world cotton industry. World production reached a record, due to an all-time-high world yield, and world exports soared to the highest ever. Although world industrial consumption rose to an unprecedented level, international cotton prices were the lowest, in real terms, since the invention of the cotton gin in 1793.

Mr. Estur explained that world planted area is shrinking by 3 million hectares, or 9%, to an estimated 30.7 million hectares in 2002/03, the lowest since 1993/94. The entire decline in area is occurring in the Northern Hemisphere. The world yield is expected to decline to 629 kilograms per hectare, still the second highest on record. World production is expected to fall by 2.2 million tons, or 10%, to 19.3 million tons in 2002/03.

Overall world cotton supply is expected to decline by 4%, 1.2 million tons, in 2002/03. However, the outlook for the supply and demand of the major types of cotton is very different from the situation facing the cotton industry as a whole. Supply of extra-fine cotton is expected to increase by 10%, leading to a decline in prices. The outlook for supply and demand in the medium, high medium and fine categories should provide some support to the Cotlook A Index during the season.

Historically low prices are stimulating demand for cotton. Cotton's market share of world textile fiber use increased for the first time since 1990 to an estimated 40.7% in 2001. The booming textile industry in China (Mainland) is the driving force behind the increase in world cotton mill consumption. World cotton consumption is expected to increase by 600,000 tons, or almost 3%, to reach a record of 20.7 million tons in 2002/03.

Low prices boosted world cotton exports to a record 6.4 million tons in 2001/02, up 600,000 tons. World cotton exports are expected to remain at a record level this season owing to a

tenfold increase of net imports by China (Mainland), to 250,000 tons.

World ending stocks are forecast down by 1.3 million tons, to 9 million tons by July 31, 2003, a seven year-low. Ending stocks outside China (Mainland) are projected to decline for the first time in eight seasons. Mr. Estur concluded by saying that projections by the Secretariat suggest that the average Cotlook A Index will rise to 53 cents per pound in 2002/03, eleven cents, or 27%, higher than last season, but will remain below the long-term average for the fifth consecutive season. The *Outlook for Cotton Supply for 2002/03* is a document of the meeting.

The CHAIR thanked Mr. Estur for his presentation.

The CHAIR recognized the delegate of UZBEKISTAN who stated that structural changes and liberalization are underway in the cotton sector. Irrigation networks and seed production are being modernized. The proportion of seedcotton purchased by state-run organizations will be reduced to 50%. Uzbekistan is developing its domestic textile industry with a target of 500,000 tons by 2005, against 175,000 tons in 2001. As a result, the available export surplus will decline, diminishing the revenues of exporters. The delegate underlined the importance of logistics for exports. He concluded by thanking the Egyptian government for hosting the Plenary Meeting and invited participants to attend the forthcoming cotton conference to be held in Tashkent from 14 to 16 November 2002. Uzbekistan's country report is a statement of the meeting.

The CHAIR recognized the delegate of SOUTH AFRICA. The delegate thanked the Egyptian government and people for their hospitality and paid tribute to the Standing Committee, the working groups, the Secretariat and the budget committee for their efficient work. He reported that due to the combination of improved world grain and oilseed prices and the weakening of the domestic currency, cotton area decreased by 45% in 2001/02, particularly on irrigated fields. More than half of the gins had to close leading to the loss of numerous jobs. He said that agriculture in South Africa is among the less subsidized in the world. He supported the idea of cre-

ating a position for a promotion specialist within the ICAC staff. South Africa's country report is a statement of the meeting.

The CHAIR recognized the delegate of INDIA. The delegate thanked the government of Egypt for organizing the plenary meeting. He stressed the importance of cotton to the Indian economy and reported that yields and production rose in 2001/02, while consumption was stable. He denounced the harmful effect that subsidies in developed countries had on farmers in developing countries. He described the initiatives taken by the government of India for improving quality, productivity and production of cotton in cooperation with the private sector. India's country report is a statement of the meeting.

The CHAIR recognized the delegate of the RUSSIAN FEDERATION. The delegate explained that the transition to a market-oriented economy was leading to progress in the textile sector. He reported that the vast majority of yarn and fabric consumed in Russia is produced domestically. International classification standards are being adopted and contamination problems are declining.

The delegate requested ICAC's support for developing cotton production in the south of the Federation, where production could potentially reach 100,000 tons, and for the promotion of cotton demand in Russia. The delegate thanked the government of Egypt and the organizing committee. Russia's country report is a statement of the meeting.

The CHAIR recognized the delegate of ARGENTINA. The delegate reported that area collapsed in 2001/02 to the lowest since 1933/34 due to low prices. Consumption dropped by almost 50% between 1991 and 2001. Exports shrank from 500,000 tons in 1996 to 20,000 tons, and imports will be needed. The delegate recalled that Argentina first called upon the elimination of cotton subsidies at the 1985 Plenary Meeting, 17 years ago. Argentina's country report is a statement of the meeting.

The CHAIR recognized the delegate of PARAGUAY. The delegate reported that Paraguay is trying to revive its production, which dropped last season due to low prices and lack of government support. He urged against all govern-

ment measures or practices that distort cotton markets, trade and production. Paraguay's country report is a statement of the meeting.

The CHAIR recognized the delegate of SUDAN. The delegate expressed its thanks to the government and the people of Egypt and to the organizing committee for their hospitality and generosity. He reported that the rehabilitation of the cotton sector is underway, supported by modernization of irrigation schemes, extension services and input supply, as well as privatization of some gins. Yields are improving and cotton area is up, mostly ELS. Sudan was seriously affected by low prices, as it exports over 90% of its production. The delegate supported the recommendations of the Working Group on Government Measures for the gradual elimination of subsidies. He concluded by reiterating Sudan's gratitude to the host country, to ICAC's executive director and staff and to the organizing committee and wishing success to the Plenary Meeting. Sudan's country report is a statement of the meeting.

The CHAIR recognized the delegate of CHINA (TAIWAN), who reported that the USA was its largest supplier of imported cotton in 2001, with almost 50% of total imports. China (Taiwan)'s textile industry is facing tough competition, as it has the second highest labor costs in Asia. Flexibility, innovation, vertical integration and decentralization are key to its survival. China (Taiwan)'s country report is a statement of the meeting.

The CHAIR recognized the delegate of GREECE. The delegate reported that yield and quality were at the highest levels in 2001. One-third of production is consumed locally and the balance exported to other EU countries and Turkey. He explained that, in compliance with the EU common agricultural policy, the Greek government aims at restricting cotton-cultivated area in order to protect the environment by preventing pollution. Greece's country report is a statement of the meeting.

The CHAIR recognized the delegate of ZIMBABWE. The delegate extended Zimbabwe's gratitude to the ICAC and member countries for having been accorded the honor to host the 60th Plenary Meeting in 2001. He expressed Zimbabwe's thanks to the Arab Republic of Egypt for the warm welcome and outstanding hospitality. He reported that production was drastically reduced in 2001/02 due to drought and explained that land reform will increase the acreage under cotton. The delegate expressed hope that solutions to the issue of subsidies will be found soon. Zimbabwe's country report is a statement of the meeting.

The CHAIR recognized the delegate of UGANDA. The delegate said that the government of Uganda has totally liberalized the cotton sector over the past three years. Production increased 21% in 2001/02 and quality control

has been enhanced. The delegate thanked the CFC for financing the Trade System Improvement Project and called upon private investment to increase production and domestic consumption. Uganda's country report is a statement of the meeting.

The CHAIR recognized the delegate of the PHILIPPINES. The delegate reported that, in spite of gains for three consecutive seasons, domestic production lags far behind consumption, which declined by 20% in 2001. The country's cotton program aims at increasing the share of domestic production used by the textile industry through government interventions, participation of the private sector, use of new technology and efforts to reduce the contamination of cotton. The Philippine's country report is a statement of the meeting.

The CHAIR adjourned the session at 3:45 pm
11:00 AM, Tuesday October 22, 2002
Mr. Hussein Yehya in the Chair

After calling the meeting to order and welcoming the delegates and observers, the CHAIR gave the floor to the delegate of TURKEY. The delegate extended his thanks to the government of Egypt for hosting the 61st Plenary Meeting of the ICAC. He reported that production is expected to be about 900,000 tons in 2002/03. Turkey was the fifth largest consuming country in 2001/02 with 1.3 million tons, while exports reached 625,000 tons. Turkey's country report is a statement of the meeting.

The CHAIR recognized the delegate of BRAZIL who presented the highlights of his country's cotton situation. Production, consumption and exports in 2002/03 are expected to remain at the same levels as last season. The delegate stated that the outcome of the recent presidential election would not affect the outlook for the Brazilian cotton industry. Brazil's country report is a statement of the meeting.

The CHAIR recognized the delegate of POLAND who reported that cotton consumption and imports are rising by 1.5% in 2002. She expressed support for the recommendations of the WGGM and explained the latest developments in the restructuring and privatization process of the Polish cotton sector. The delegate explained the role of the Gdynia Cotton Association, adding that it will organize the 62nd Plenary Meeting of the ICAC in 2003, hosted by the government of Poland. Poland's country report is a statement of the meeting.

The CHAIR recognized the representative of the IFCP (International Forum for Cotton Promotion). She reported that thirteen participating countries made financial commitments to the group to encourage national market development programs through the exchange of ideas and experiences, for the purpose of increasing international cotton consumption and market share. The IFCP is acting as a clearing house for ideas,

market research, resources and information that could allow natural cotton industry organizations to better equip themselves for the promotion of cotton in their own countries. The IFCP has developed a booklet as a practical tool to generate promotional activities and strategies. The representative asked all members of the ICAC to support the Forum and to support the proposal that the Secretariat recruit a marketing specialist. The IFCP's report is a statement of the meeting.

The CHAIR introduced the delegate of the EUROPEAN UNION (EU) who welcomed the opportunity to clarify its position within the ICAC on cotton policy. The EU takes note of the concerns expressed by members of the ICAC regarding the consequences that certain national policies can have on the producers of developing countries. The EU is ready to identify solutions to the problems of the cotton sector and to consider granting compensatory measures in the short and medium terms. The delegate explained that, as EU production accounts for only 2.5% of the world total, it has no significant impact on world prices. He added that EU imports represent 15% of world imports. The EU's remarks are a statement of the meeting.

The CHAIR gave the floor to the representative of the COMMON FUND FOR COMMODITIES (CFC) who reported that the current project portfolio for cotton as presented has reached more than \$20 million in CFC funding. He highlighted some of the twelve projects. He concluded by saying that the Regional Round Table Meeting on Commodity Development, which will take place in Ouagadougou, Burkina Faso, next 18-21 November will set priorities for cotton development in the African region to the benefit of small scale producers and identify possible support from the CFC to ICAC-proposed projects. His report is a statement of the meeting.

The CHAIR recognized the delegate of AUSTRALIA. The delegate thanked the Egyptian government and the Egyptian organizing committee for hosting the plenary meeting. He said that the WTO round must be used to, at least, substantially reduce all forms of government measures that distort world's cotton trade. Australia fully supports the observations made on the negative impact subsidies are having on prices and their social consequences. The delegate urged all countries to use the Doha negotiations to minimize distortions and to maximize opportunities for cotton in fiber markets. He supported the proposal for a new position at the Secretariat devoted to cotton promotion and demand enhancement. Australia's remarks and country report are statements of the meeting.

The CHAIR introduced the delegate of PAKISTAN. The delegate stressed the importance of cotton for his country. He reported on the domestic cotton situation, explaining that producer

prices remained above the support level since the beginning of the season. The production target of 10.1 million Pakistani bales in 2002/03 is likely to be surpassed. He explained the measures undertaken by the government to improve the quality of cotton and the research and development programs underway. Pakistan's country report is a statement of the meeting.

The CHAIR recognized the delegate of EGYPT who thanked the participants, the Secretariat and the organizing committee. He emphasized that liberalization of the cotton sector achieved fruitful results. He noted that yields and the quality of cotton have improved and that the share of the private sector has increased. Marketing efforts with the creation of a logo for the Egyptian cotton have boosted export commitments. He reported that production in 2002/03 is expected to cover all local and international needs. Egypt's country report is a statement of the meeting.

The CHAIR gave the floor to the delegate of CHAD who expressed his thanks to the government and the people of Egypt for their warm welcome. He congratulated the Secretariat for the quality of its documents and presentations. He said that as cotton is Chad's major export, depressed prices have a devastating impact on the revenues of 2.5 million people making their living from cotton and on the national budget, hampering education and health programs. The delegate urged participants to analyze the causes and to propose solutions to the present crisis. He supported the creation of a position for a marketing specialist within the Secretariat. Chad's remarks are a statement of the meeting.

The CHAIR recognized the delegate of TANZANIA. The delegate thanked the government and the people of Egypt for their warm hospitality. He mentioned that his country's report was distributed to participants and summarized recent developments. Production was up 22% in 2001/02, thanks to good producer prices during the previous season, availability of inputs and favorable weather. Tanzania's country report is a statement of the meeting.

The CHAIR introduced the delegate of the UNITED STATES who expressed his appreciation to the government of Egypt and the Egyptian organizing committees for their hospitality. He thanked the Secretary General, the Chairman of the Standing Committee and the Secretariat for their excellent work. He referred participants to the detailed country report from the U.S. He stated that the United States supports the work of the ICAC on the effect of government measures on cotton and noted that the USA has a comprehensive proposal for the WTO negotiations on agriculture, including the complete elimination of all trade distorting subsidies at a specific date. The USA's country report is a statement of the meeting.

The CHAIR gave the floor to the representative of ASSOCIATION COTONNIERE AFRICAINE (A.C.A.). On behalf of his association, the representative expressed his warmest thanks to the government, the people and the Egyptian cotton family for their hospitality. He thanked the ICAC for giving him the opportunity to introduce the A.C.A. to the audience and congratulated the Secretariat for the excellent organization and the quality of the documents. He said that cotton is the major source of income for more than twenty million Africans. He explained the role of A.C.A., which was founded last September with 29 member cotton companies from eleven countries, accounting for 58% of Africa's cotton production. A.C.A. is a forum of consultation aiming at defending the interests of the African cotton industry and at improving the marketing and the quality of African cotton. He invited all associations, companies, organizations and individuals having an interest in the cotton industry to join A.C.A. His remarks are a statement of the meeting.

The CHAIR recognized the delegate of the UNITED KINGDOM. The delegate expressed his thanks to the government of Egypt for hosting the plenary meeting. He pointed out that the UK's connections with the cotton industry are focused mainly on the provision of rules and arbitration services rather than importing and processing. He highlighted the critical impor-

tance of the sanctity of contracts and welcomed the progress made through CICC. The UK's country report is a statement of the meeting.

The CHAIR introduced the delegate of MALI who conveyed his gratitude to the government and the people of Egypt. He stressed the importance of cotton in the social and economic life of his country. Mali is the second largest cotton producer in Africa, after Egypt, with more than two million producers. As cotton is the largest source of export revenues, the drop in prices had a dramatic impact, aggravating poverty. The delegate explained the structural changes underway in the cotton sector with larger participation from the farmers' unions. He concluded by saying that Mali is actively supporting all the initiatives aimed at the elimination of trade-distorting subsidies. Mali's country report is a statement of the meeting.

The CHAIR gave the floor to the representative of CIRAD (Centre de coopération internationale en recherche agronomique pour le développement) who thanked the host country and the ICAC for giving him the opportunity to represent his organization at the plenary meeting. He said that about sixty people are employed in the cotton research program focused on three projects: development of new crop management sequences, cotton quality control and assessment of the environmental impact of transgenic cotton. CIRAD's presentation is a statement of the meeting.

The CHAIR recognized the delegate of BELGIUM who expressed his thanks to the government of Egypt. He noted that there were encouraging signs of economic recovery in Belgium. Although it is not a major player in the world cotton industry, Belgium is keen on participating in the search for solutions to the present crisis, he said.

The CHAIR adjourned the session at 12:30 pm.

*[The Secretariat also received country reports from the delegations of Germany, Japan, the Republic of Korea and Togo, and a statement from the World Bank. These documents are included in the **Statements of the Meeting.**]*

Third Plenary Session

1:45 PM, Tuesday October 22, 2002
Mr. Nabil El Marsafawy in the Chair

The CHAIR called the meeting to order and introduced Mr. Michael Tietge, Assistant Secretary of the Department of Foreign Affairs and Trade of Australia to present a paper on the "Successful Outcomes for Cotton in the WTO Agriculture Negotiations." Mr. Tietge said that there were four issues to discuss: agriculture and the WTO, the criteria to measure success for cotton

in the Doha Round, the strategy proposed by the Working Group on Government Measures (WGGM), and suggestions on possible conclusions and actions. In regard to agriculture and the WTO, he said that in the Conference on Cotton and Global Trade Negotiations (CCGTN), sponsored by the ICAC and the World Bank, it was recognized that cotton occupies a prominent position in the economies of many countries providing income to around 100 million

farm units directly engaged in cotton production, and that the cotton market is the most highly distorted market. There is now an opportunity in the Doha Round to make trade disciplines in agriculture more effective. In regard to the measure of success for cotton, he said that the Cairns Group offered a proposal on market access and domestic support including cuts in tariffs in industrial countries to 25% or lower, substantial expansion of all tariff quotas and elimination of

all forms of support within five years. Another proposal was offered by the USA, which calls for substantial tariff cuts, elimination of export subsidies, and the harmonization of reductions in trade-distorting domestic support. In regard to the proposal by the WGGM, Mr. Tietge said that it calls for even greater trade liberalization, that it is a proposal consistent with that of Australia and the Cairns Group, that the ICAC should consider lending support to the Cairns Group proposal, and that the Government of Australia welcomes the WGGM proposal. In conclusion, Mr. Tietge said that the importance of the cotton industry in world agricultural trade cannot be overstated, and that there is a real opportunity to negotiate a good outcome for cotton in the current WTO negotiations. His presentation is a statement of the meeting.

The CHAIR recognized Mr. Alfonso Liévano, Chair of the WGGM to present Working Paper I, which contained the proposal of the WGGM. Mr. Liévano read Working Paper I, and explained that the proposal was three-fold, including a strategy to reduce and eventually eliminate subsidies, fostering of alliances to lobby industrial countries regarding the injury caused by their subsidies in other countries, and calling for funding from the World Bank to finance temporary measures that would help non-subsidizing countries cope with distortions in the world market. Finally, he said that he would like to eliminate from the proposal the issue regarding promotion of cotton, as it did not pertain to the subject of trade negotiations.

The CHAIR opened the floor for discussion and recognized the delegate of TURKEY, who made a short presentation about the injuries caused by low prices in Turkey. He said that as a result of low prices cotton area declined in two of the three cotton regions in his country, income was lower in the ginning, cottonseed, and transportation sub-sectors, and trade in textiles declined. He mentioned that total employment had declined by 9.7% as a result of low prices, and that the total income loss to cotton farmers in Turkey was \$2.8 billion between 1995 and 2002. Dr. Sebahattin Gazanfer's PowerPoint presentation is available on the ICAC web site.

The delegate of ARGENTINA said that the recommendations of the WGGM and the debate in the CCGTN, sponsored by the ICAC and The World Bank, were beneficial and left a sense of optimism. However, he mentioned that the proposed long-term resolution of the issue of subsidies was a matter of great concern. He mentioned that John Maynard Keynes once said that "in the long term we are all dead," and that if a solution was not found in the very short term, plenary meetings would be attended only by consuming countries and those countries that subsidize production and exports of cotton. He also mentioned that as a result of the activities of the WGGM and the CCGTN, other interna-

tional organizations had become interested in the issue of cotton subsidies and had expressed their concern regarding the impact of subsidies on poverty. In many countries, including Argentina, lower prices have resulted in dramatically lower production, which exacerbates the external debt. The delegate was pleased that the ICAC had included the issue of subsidies in the final statement of the last few plenary meetings and that this concern was shared by other international organizations such as The World Bank, the International Monetary Fund, the WTO and the FAO. He said that the issue had always been softened with words like "eventual" and "some countries," which did not accurately represent the dimension of the crisis subsidies create. Finally, he said that in the context of the WTO, developing countries were asking that the dates agreed be honored by all countries, and that the negotiations conclude on 1 January 2005, as mandated by the Doha Declaration. His remarks are a statement of the meeting.

The delegate of GREECE made the following comments:

"We have gathered here to discuss issues concerning cotton production. Issues that start from the stage of picking up to the stage of the use of the final cotton products.

"It is rather impossible to have cotton without the existence of cotton growers, the farmers who struggle in order to produce and give to the world cotton of the best quality.

"In order to encourage cotton growers to fulfill their task properly, we must learn from them and try to understand their problems, mainly, the large number of farmers, the small size of their holdings, the number of small plots per holding, and high labor costs, as well as many other constraints that distort the production system and make the cultivation of cotton unprofitable.

"Having said that, we are of the opinion that the development of any strategy for the reduction and elimination of subsidies should take into account the above mentioned problems facing our cotton growers, and should give them the alternatives to stay in farming."

The delegate of SOUTH AFRICA thanked the WGGM for the work and interest it created regarding subsidies. The delegate stressed that there cannot be a doubt that subsidies distort world prices and cannot continue to exist. He supported the Argentine position with regard to the word "eventual." He added that the word "eventual" was unacceptable and that phase one of the WGGM proposal should include the elimination of income and price supports in parallel to the elimination of export subsidies.

The delegate of the UNITED STATES commended the work of the WGGM and said that the ICAC has an important role to play regarding government measures. He thanked the Secretariat for the analyses on government support

worldwide and for sponsoring the CCGTN. He mentioned that in July 2002 the USA filed a proposal regarding cotton and textiles in the WTO, which was comprehensive and in line with what ICAC member governments had discussed in plenary meetings. He said that it specifically proposed for all commodities the elimination of export subsidies, that a date be set to eliminate all trade distorting measures, that the Amber Box be reduced to 5% of the value of production within five years, and that market access and tariff quotas be increased. He added that the U.S. proposal supports negotiation on product specific commitments beyond the basic commitments. In closing, the delegate said that the ICAC should continue its role as a provider of information regarding the effects of subsidies on the cotton industry. *[A statement made by the delegate of the USA at the beginning of the Third Open Session (Technical Seminar) on Thursday, regarding the discussions on Working Paper I, is included as part of the Third Plenary Session in the Statements of the Meeting.]*

The delegate of BRAZIL said that as a result of the CCGTN it became clear to his government that rapid change was needed and that something had to be done in the short-term within the framework of the WTO. He agreed with Argentina in relation to the concern that the Doha Round could be a long-term process. He mentioned that the government of Brazil, in complete agreement with the whole cotton agro-industrial chain had requested formal consultations with the USA with the hope that a meaningful agreement could be reached. He further stressed that it was not the interest of Brazil to seek conflict, but to seek a solution, that it was the opinion of his government that unless distortions were eliminated, the cotton market had no future. He noted that the Brazilian request was a public document that could be obtained on the Internet and that he would supply copies of the document to anyone interested. He fully supported the proposal of the WGGM and agreed with South Africa with regard to the word "eventual."

The delegate of COLOMBIA supported the position of Argentina and South Africa and added that misery, unemployment and death of populations dependent on cotton was due to the inability to find a solution. He suggested that the word "eventual" be changed for the word "immediately," and noted that export subsidies are clearly in violation of WTO norms and should be eliminated in parallel to the elimination of other subsidies. He finally said that the sovereign right of countries to support local producers cannot be criticized, but that the principle that the rights of one end where the rights of others begin cannot be altered. It is not the right of any country to implement measures that transcend its borders and cause grave injury to millions of cotton growers and laborers in countries that do not have the capacity to provide

equal support and protection, he said. His remarks are a statement of the meeting.

The delegate of INDIA said that fifty million people depend on cotton in his country and his government is clearly concerned about the injury caused by subsidies. He supported the views of Argentina, South Africa, Brazil, and Colombia, and added that subsidies must end immediately. He said that his government supported the WTO negotiation, but that the ICAC was a fully competent body to lend support to the WTO negotiations regarding cotton.

The delegate of GERMANY expressed a feeling of gratitude toward the people and government of Egypt for the organization of the plenary meeting and suggested that a successful resolution to the issue of subsidies could be combined with memories of the Cairo Plenary Meeting. He mentioned that in the EU there are different countries with different feelings regarding subsidies. He added that accepting a resolu-

tion on subsidies seems to be politically possible.

The delegate of the NETHERLANDS said that cotton presents an extreme example of policy incoherence of some industrial countries against developing countries and that millions of cotton farmers in poor countries are undermined by billions of dollars in subsidies, which benefit a relatively small group of stakeholders in the USA and the EU. Cotton subsidies in industrial countries enhance poverty, create macroeconomic imbalances, lower social sector spending and foster socio-political instability in several cotton dependent developing countries, he said. The unfair competition on the world cotton market must be tackled, as cotton farmers in developing countries deserve to get a better deal. The delegate said that the WGGM had drafted a prudent but realistic proposal. His remarks are a statement of the meeting.

The delegate of ARGENTINA said that in reference to the remarks by the delegate of Greece,

since 1985 statements of the plenary meeting refer to "some countries," without explicitly indicating which ones. He said that actions should come now in Cairo.

The delegate of ITALY said that the WTO should be used to immediately reduce cotton subsidies.

The delegate of SOUTH AFRICA asked the Chair of the WGGM the meaning of the expression "early harvest." In replying, the chair of the WGGM said that it signified a first concession to reduce distortions, prior to the end of negotiations in 2005.

The CHAIR instructed the Secretariat to incorporate Working Paper I as an annex to the final statement of the meeting, after modifications by the Secretariat, based on the discussion during the session. [*The modified Working Paper I is attached to the Statement of the 61st Plenary Meeting as Annex II.*]

The CHAIR adjourned the meeting at 3:45 pm.

First Open Session

4:15 PM, Monday October 21, 2002

Mr. Sayed Dahmouh in the Chair

The CHAIR noted that the topic of the session, "Encouraging Investment in the Cotton Sector," had been suggested by the 60th Plenary Meeting in Victoria Falls, Zimbabwe, with the purpose of developing recommendations regarding lower import tariffs for machinery used by the sector. He then introduced Mrs. Amal El Togby and Mr. Mohamed Elmasri, of AIT CONSULTING, who co-authored a paper on the challenges facing investment in the Egyptian cotton industry. Mrs. Togby said that the textile industry is the cornerstone of economic development for developing countries, being an important source of employment, meeting local market needs, and a major source of foreign currency earnings. Trade liberalization and international trade agreements have resulted in a highly competitive environment for the textile industries of developing countries, in which survival depends on sustaining a competitive advantage. In regard to the Egyptian cotton industry, Mrs. Togby said that significant development of the industry took place between 1945 and the late 1960s, with state-owned companies directed to produce low-priced goods for the low-income population. As a result, lack of investment and mismanagement translated into low output, inconsistent quality and incapacity to compete in international markets. In the 1970s and 1980s the industry faced the introduction of liberalization policies, which led to the establishment of a large number of small and medium size enterprises in the private sector, mainly in garment manufactures. As a complement to Mrs. Togby's remarks, Mr.

Mohamed Elmasri said that the importance of the textile industry in Egypt could be illustrated by the fact that it employed one-third of the country's work force and that textile manufactures accounted for 25% of Egypt's total exports. He noted that 90% of the textile industry and 60% of the weaving sub-sector was government owned, and that the analysis of the competitiveness and challenges of the industry had to include the structure, the factor of production and government intervention. In regard to the structure of the textile industry, he noted that the structure was biased toward state-owned spinning and weaving production, with obsolete facilities, inefficient organization and inconsistent quality. In contrast, the private sector in the knitting and ready-made garments industry had experienced some success in export markets, but had limited impact as it accounts for a small portion of the textile sector. He added that competition in the local and international markets is intensifying, that local demand for textile products is unsophisticated and registers modest growth, and that multilateral and bilateral trade agreements result in increased competition, which is not faced by the sector with a strategic vision. Organization of the industry is not export oriented, there is limited research and development, high prices for local inputs and limited access to international markets, resulting in a decline in industrial consumption of cotton. In regard to factors of production, he said that sufficient land is available for cotton production, there is a geographical proximity to European markets, wages are low, and there is a relatively well developed infrastructure, but that productivity is low, port operations need reform, and interest rates and

taxes are high. In regard to government support, Mr. Elmasri said that government investment concentrates in special economic zones, that privatization is slow and that policies are biased against small and medium sized enterprises. Finally, he noted that legal reform and guarantees and incentives for foreign investment are needed. In closing, Mrs. Togby noted that the government and the private industry have complementary roles, and that a list of actions include clear monetary policies, translation of government vision into strategic plans, improved efficiency of the legal framework, increased incentives and guarantees for foreign investment, and technical assistance. Their presentation is a statement of the meeting.

The CHAIR noted that government and private sector actions had resulted in recent foreign investments in the extra-fine and coarse count yarn sub-sectors. He opened the floor for questions. A participant remarked that the decline in consumption could be remedied if the Egyptian industry used extra-fine cotton for exports, while importing coarse count cotton for domestic consumption.

The CHAIR introduced Mr. Ioannis Kaltsas from the EUROPEAN INVESTMENT BANK (EIB), to present a paper on "Private Sector Investment in Developing Countries." Mr. Kaltsas said that investment in the cotton industry is a high priority of the EIB, that it was the opinion of the EIB that the present decade is an important one for investment in the cotton sector and that in the last fifteen years the EIB has financed 150 projects in the cotton sector. The EIB portfolio amounted to 37 billion euros in 2001, and in

addition to financing, the EIB provides technical assistance. He noted that despite being the most interesting sector for investment, the policy environment of the cotton sector makes it a difficult one. An increasing number of projects base revenue projections on a more liberalized market, giving investors greater uncertainty. Difficulties are also derived from constant changes in agricultural and industrial policies, as well as from higher environmental standards. One more difficulty is that trade blocks and customs unions impose new terms to competitiveness. Against such an environment, the main challenge for investors is to find a sound financial profitability model, with expected profits that are not based on price variations or market distortions. Parallel to these decisions, governments should also take into account the social and environmental sustainability of investment programs, while providing incentives to attract investors, addressing infrastructural priorities, an appropriate legal framework, and serious efforts to restrict corruption. In closing, Mr. Kaltsas said that governments should also have an active role in assisting stakeholders in the discovery of investment opportunities and protecting environmental and social elements of investment programs. His presentation is a statement of the meeting.

The CHAIR opened the floor for discussion and an observer asked about the EIB's involvement in the textile sector. Mr. Kaltsas replied that the EIB has financed 150 projects in the cotton agro-industrial sector, that the portfolio of the EIB amounts to 37 billion euros, and that the bulk of investment is allocated in EU-member and prospective-member countries. In response to a question regarding the need for investment in machinery in Egypt, Mr. Kaltsas said that the EIB allocated two billion euros to the Mediterranean Partnership and that Egypt could benefit from those funds. In response to a question regarding investment in sub-Saharan Africa, Mr. Kaltsas said that in the last two years the EIB

had financed projects in Mali, Burkina Faso, Madagascar and Zambia.

The CHAIR noted that the objective of the session was to develop recommendations on the subject and suggested for recommendation the reduction of duties for imported machinery, tax exemptions, the creation of free zones, and the recognition that spinning is increasingly a capital intensive industry and, as such, it does not address labor problems.

The CHAIR introduced Mr. Peter Wakefield of WAKEFIELD INSPECTION SERVICES to present a paper on the "Difficulties Affecting Machinery Imports Based on Experience as a Controller." Mr. Wakefield said that his perspective was that of a controller, whose role is in the pre-shipment inspection of machinery. A usual problem is that of additional fees and import levies on arrival, which are not anticipated by importers, including excise and value-added taxes, warehouse and customs fees, and others, which combined can amount to thousands of dollars. He said that in preparing new legislation, governments should consider a single document procedure stamped by two different departments within the customs office, one by customs and another one by the tax office. Usually, documents should be cleared by two offices, which are several kilometers apart. Another difficulty is that of standardization of infrastructure used in transporting shipments. Occasionally the trolleys used to transport shipments are locally manufactured and cannot handle correctly, if at all, the dimensions of the shipment. Finally, Mr. Wakefield said that yet another difficulty is related to the re-exportation and re-importation of machinery to address maintenance and other needs. In some countries it is virtually impossible to move equipment once it is imported, he said. His presentation is a statement of the meeting.

In opening the floor for discussion, the CHAIR

noted that the recommendations should also include a check into customs duties and procedures on machinery and the effect of currency depreciation on import contracts.

The CHAIR introduced Mr. Albert Gierend of the EGYPTIAN-GERMAN COTTON SECTOR PROMOTION PROGRAM to present a paper that he co-authored with Mr. Mohamed Abo El Wafa and Mr. Heinz Burgstaller titled "The Unfinished Agenda of the Cotton Sector Liberalization: Simulating the Supply of Lint Cotton and Price Risks for the Domestic Spinning Industry." Mr. Gierend said that his presentation was an analysis of the Egyptian cotton sector based on a market model that allowed the assessment and quantification of the economic effects of different price policy regimes on the domestic spinning industry, including floor prices to producers and minimum export prices. After a brief description of the model's operation, Mr. Gierend noted that the results of the model suggested that the spinning industry benefits from the absence of price controls and that simulated trade restrictions resulted in increased stocks of cotton and cost to the government, as average prices decline with increased imports and subsidized carryover. In conclusion, Mr. Gierend said that there is a need for reform of the pricing system and export policy of Egyptian cotton. Egyptian exporters should be given the freedom to offer large price discounts to potential buyers, with the aim at a complete liberalization of prices in the long-term. In addition, prices of seedcotton should also be free of intervention in order to avoid excessive deficiency payments. Finally, Mr. Gierend said that price reform should stabilize the domestic seed and lint cotton markets, bring back continuity of export volumes, avoid unnecessary increases in carryover above the level of strategic stocks and reduce the government's financial burden. His presentation is a statement of the meeting.

The CHAIR adjourned the session at 5:45 pm.

Second Open Session

8:30 AM, Tuesday October 22, 2002
Mr. Galal El Rifai in the Chair

The CHAIR opened the session devoted to "Providing Incentives for Improved Cotton Quality Through Measurement of Intrinsic Values" saying that, during the past fifty years, methods of measuring the quality of cotton have greatly developed, from visual assessments of grades and fiber properties to the introduction of instruments for accurate measurement of fiber quality parameters. The CHAIR noted that in his personal view, visual testing factors add a finer touch and should not be disregarded completely. The remarks by the Chair are a statement of the meeting.

The CHAIR introduced Mr. Charles Wilson, cotton grower from Australia to present a report titled "A Consumer Dominated Economy: The Need for Quality Improvements." Mr. Wilson noted that the cotton industry has faced a massive decline in market share over the past thirty years and needs to meet consumer quality requirements in order to grow and reverse this market trend. Mr. Wilson indicated that ring spinning spindle speeds rose during the past thirty years and will continue to increase, requiring better quality from growers, including higher strength, uniformity and length. He said that mills will need to pay a greater premium for better quality cotton, encouraging farmers

and researchers to produce better quality lines, however, better descriptions of cotton are needed to include length, strength, micronaire and color, plus measurements of neps, short fiber and stickiness. Mr. Wilson urged a faster development of instruments to better describe cotton quality and better compete with synthetic fibers. Mr. Wilson described the Australian cotton industry as fast growing and quickly responding to quality requirements by mills through the use of a system of quality premiums and discounts, and concerted efforts by researchers, plant breeders, shippers and classers to meet market requirements. He said that Australian growers' farm economics are based on direct market signals

and on the spinning industry requirements. Mr. Wilson noted that the cotton industry needs to meet end users' requirements. His presentation is a statement of the meeting.

The CHAIR introduced Mr. Andrew Macdonald, Director of SANTISTA TEXTIL, who said that HVI classing is today a reality and an indispensable tool for the textile industry to maintain and improve quality and to control the application cost of cotton. Mr. Macdonald noted that even in those countries that class with HVI, in many cases the old manual concepts for valuing cotton are still used, and that the main excuse for this situation is that machines vary in calibration, affecting the results. He suggested that the main characteristics are commercially acceptable and therefore negotiable, whilst the other less consistent data could be provided with cotton shipments as information only, and buyers would be better able to judge the intrinsic values of cotton, calculating and offering premiums accordingly. Mr. Macdonald illustrated the spinning value of cotton as expressed in CSP (count strength product), an index available on HVI machines, showing that as fiber strength and uniformity increase so does the spinning value. A steeper increase takes place with the increase of fiber length. He noted that micronaire effects are more complicated since the relation to cotton values is not strictly direct and the question of cotton maturity takes its toll when micronaire becomes finer. Mr. Macdonald illustrated that if strength and length were increased over a certain point, values would rise, explaining the premiums for long staple, low micronaire, high strength cottons, like those found here in Egypt. He noted that since color is considered in the grade, color and classing are not considered intrinsic values since they are visible to the human eye and can be valued accordingly. However, HVI is a tool that can assist or even determine the classing grade. Mr. Macdonald also illustrated that the spinning value is little altered by leaf content. However, commercial reduction for leaf grade is based according to trash content, which represents a weight loss during spinning. Mr. Macdonald concluded by saying that the idea of his short presentation was to explain how spinners might value the cotton purchased, so that for growers and researchers could apply this knowledge to create incentives for improving cotton quality. His presentation is a statement of the meeting.

Mr. Bill Dunavant asked Mr. Macdonald how he envisions the HVI classing coming together in the future with the measurement technique presented in his report.

Mr. Macdonald replied that he tried to show the concept of spinning values in his presentation. He said that eventually, as instruments become more reliable, it will become possible to measure spinning value commercially.

The delegate of ARGENTINA suggested that

because there is a consistent difference in the measurement of strength between the stelometer and the HVI, HVI measurements should be used universally, or a correlation should be established between the two measurements.

Mr. Macdonald replied that it is in the interests of the industry to use the HVI system more widely. However, the stelometer is an accurate instrument and there is a correlation between the two measurements. He noted that the use of any instrument should not be restricted if the relationship is established to the measurements made by HVI, and if measurements are performed in a fast way.

The delegate of ITALY said that as a spinner he favors the use of HVI and considers the parameter of short fiber content to be very important for the spinner because there is a correlation between this parameter and the quality of cotton yarn.

Mr. Macdonald agreed with the delegate of Italy and said that the short fiber content index, as well as several other parameters, is important for spinners and should be discussed further within the industry.

The CHAIR recognized Mr. Bill Dunavant III, DUNAVANT ENTERPRISES, to present a report on the "Advantages of the High Volume Instrument System." Mr. Dunavant reported that the United States Department of Agriculture (USDA) has provided the U.S. cotton industry with cotton grade standards and cotton classification services since the 1920s. He noted that the success of the U.S. cotton classification system has developed with the introduction of the High Volume Instrument (HVI) testing system in 1980, which brought substantial advantages compared with manual and subjective classification. Mr. Dunavant described the benefits of the HVI including accuracy, automation, flexibility, and a wider range of measurements. He reported that by 1991 the entire U.S. crop was classed with HVI systems and today there are approximately 250 HVI lines in use within the USDA Cotton Program. Mr. Dunavant said that the HVI requires less training than manual classing, and reduces the number of classers at substantial savings in time and money. He noted that the HVI increased the number of quality factors that can be measured, improved the measurements, and facilitated the establishment of absolute reference standards. Mr. Dunavant named major measurements performed by the HVI, including length, strength, uniformity index, micronaire, reflectance, yellowness, and trash. He noted that the only measurements still performed manually are leaf grade and extraneous matter. Mr. Dunavant said that advanced data provided benefits to textile manufacturers, helped to optimize ginning processes, and led to the implementation of advanced data management techniques, increasing data transmission. He indicated that several new measure-

ments, such as short fiber index and fiber maturity will be added in the future.

Mr. Dunavant concluded that the HVI system has been proven reliable, efficient, has improved the competitiveness of U.S. cotton in the world market, and will play a major role in the success of the world cotton industry. His presentation is a statement of the meeting.

The representative of CIRAD asked Mr. Dunavant's view on the solution of variations between the measurements by different HVI machines, for example, for fiber strength, and the need for the reference fiber and machine calibration.

Mr. Dunavant replied that there are 250 machines in the United States, and that the USDA is working on standardization of calibration samples for these machines, and is studying ways to achieve better calibration. He noted that there are substantial improvements in the technology.

Mr. B. K. Patodia from India thanked Mr. Dunavant for the presentation and asked if measurements by the HVI are so reliable, why are shippers reluctant to provide measurements on uniformity index, Rd and +b values.

Mr. Dunavant replied that it is possible to obtain any information for a price. He noted that the USDA green card is available to anyone who is willing to buy on this basis. He said that it is possible also to purchase cotton on a private type or on the universal standard description, and that there is a price difference for each basis. He also mentioned that the U.S. is a leader and innovator in the classing system.

Mr. Patodia commented that it is not a question of price, but the reluctance on the part of the supplier to provide information on Rd and +b values, despite the availability of such information.

Mr. Dunavant replied that the next step could be measurements of short fiber content, neps and stickiness. He said that shippers could be afraid that providing these new parameters could lead to an additional discount. Mr. Dunavant stated that the availability of these characteristics benefited the cotton industry in the United States.

The delegate of ARGENTINA noted that there should be a fair system of premiums and discounts for cotton quality. He said that over 90 percent of cotton marketed in Argentina is not measured by the HVI, and producers in many cases sell cotton below its value. He stated that there is no accurate system of payment for cotton quality.

Mr. Dunavant noted that the classification system in the United States works well for the industry and does establish accurate values. He noted that the spinning industry is technologically advancing and is demanding better information on cotton quality, while producers an-

swer these demands by providing better quality.

Mr. Macdonald noted that the basic problem with the system of premiums and discounts is the lack of consistency of cotton quality outside the USA. He noted that once a large variation in cotton quality is eliminated, a system of premiums could be established.

The delegate of GREECE noted that the HVI classification is very reliable. However, consistency of the measurements and interpretation of the results around the world should be improved to benefit the cotton industry.

The CHAIR recognized Mr. Ibrahim Malloum, COTONCHAD, to present a report on the impact of instrument-based quality evaluation on developing countries. Mr. Malloum described the manual system of cotton classing of such parameters as grade, color, trash content, preparation, and staple length. He said that the grade is

determined by comparison to standards, while leaf content is visually estimated by the classer. He noted that the preparation determines the smoothness or roughness of the fiber and is dependent on the ginning speed and quality. Mr. Malloum described different color characteristics dependent on moisture, insects, and fungus. He mentioned instruments used for manual testing in a specially conditioned room. He reported that the introduction of HVI equipment in the 1980s and 1990s automated the testing process and led to a transformation of cotton production and trading practices especially in the United States. Mr. Malloum said that HVI testing is used for research and development and for creation of new varieties. He said that the introduction of HVI eliminated subjectivity in cotton classing, providing traders with a larger number of characteristics, and allowing them to better determine value. He also pointed to the necessity

to calibrate the HVI equipment correctly and to use it in appropriate conditions.

Mr. Malloum described the constraints of using the HVI in Chad, one of which is the difficulty of maintaining a certain temperature and conditions in the testing room, as in many cases electric supply remains a problem. He also noted the difficulty of maintaining the equipment. Mr. Malloum concluded that despite these constraints, in Chad there is no other choice, but to supply customers with the quality characteristics of the fiber required, and to eliminate all of the constraints for the use of the HVI system. He noted that HVI equipment is measuring characteristics of the fiber. However, real quality of the fiber depends on variety, climate, technology, and processing. His presentation is a statement of the meeting.

The meeting was adjourned at 11:00 AM.

Closing

11:00 AM, Friday October 25, 2002
Mr. Amin Ahmed Abaza in the Chair

The CHAIR invited delegates to make closing remarks and recognized the delegate of Poland to present the invitation of the government of Poland to hold the 62nd Plenary Meeting.

The delegate of POLAND thanked the host government for the excellent organization of the meeting and the warm reception in Cairo. On behalf of the government of Poland, she expressed gratitude to ICAC member countries for accepting Poland's invitation to hold the 62nd Plenary Meeting for the first time in eleven years in a consuming country. She reported that the government of Poland, with the cooperation of the Gdynia Cotton Association, was ready to organize the meeting, which will be patronized by the President of Poland and the Minister of Economy. She noted that the venue of the meeting will be Gdansk, one of the oldest multinational, multicultural and multireligious cities with the Hanseatic trade tradition going back to the 13th century. She said that the social program of the meeting would include a visit to Malbork, the famous 13th century fortress of the Teutonic Order and other historic sites. She noted that it would be an honor to provide the proverbial Polish hospitality to participants of the meeting.

The CHAIR thanked the delegate of Poland for the invitation and wished success to the 62nd Plenary Meeting. He thanked participants for having attended the meeting in Cairo and thanked the group who helped to organize the meeting, including Mr. Shalaby, Egyptian American Tours, members of Alcotexa, and his Excellency,

Minister Youssef Boutros Ghali. The CHAIR invited delegates to make closing comments.

The delegate of ARGENTINA expressed his gratitude to the host country and its private sector for its hospitality, friendship and the opportunity to visit historical places. He thanked the organizing committee, the Standing Committee, the working groups, the executive director, the ICAC Secretariat, delegates, representatives of international organizations, the Private Sector Advisory Panel and its president as well as all those who worked for the success of the meeting, and especially interpreters. He used the opportunity to pay tribute to interpreter Guillermo Baserva, who worked for the ICAC for more than ten years and passed away last July.

The delegate of COLOMBIA thanked the organizing committee and the ICAC Secretariat for the efficient organization of the meeting's logistics which facilitated the work of the delegates. He expressed gratitude for the work of the interpreters and for the warm hospitality of the beautiful country of Egypt. He thanked organizers for a wonderful program of social events, including a trip to Abou Simbel and for the opportunity to learn more about Egypt's history and legend. He noted that participants were treated as pharaohs.

The delegate of SOUTH AFRICA thanked the government of Egypt, Minister Boutros Ghali, Mr. Amin Abaza and the organizing committee for hosting the 61st Plenary Meeting, and congratulated them for an excellent job in organizing a most successful conference. He said that it was a very special experience for most participants to understand the history and culture of

this beautiful country. He thanked the sponsors and interpreters for their excellent job and paid tribute to the passing of Mr. Guillermo Baserva. He appreciated the hard work of the executive director and the Secretariat, and noted that the ICAC has come a long way from discussing administrative issues several years ago to focusing primarily on cotton issues and that this conference was a very fruitful event.

The delegate of the UNITED KINGDOM thanked the Egyptian Government, sponsors and all the organizers for such an impressive conference. He also thanked all the support staff, including interpreters, for their hard work and said that he was looking forward to the next meeting in Poland.

The delegate of INDIA thanked the government of Egypt, sponsors, the organizing committee and the ICAC Secretariat for organizing a beautiful and fruitful conference in the historic city of Cairo. He praised the high level of hospitality and thanked the organizers for arranging a visit to the historic Abou Simbel.

The delegate of SUDAN expressed his gratitude to the government of Egypt for the Arabian hospitality and wonderful preparations for the meeting. He also thanked the organizing committee, the executive director and the Secretariat for their efforts to make this meeting a success. He said that he was looking forward for the next meeting in Poland.

The delegate of TURKEY thanked the government of Egypt, the organizing committee and sponsors for their hospitality and excellent programs prepared for the meeting. He also thanked the executive director, the Secretariat, members

of the Private Sector Advisory Panel and interpreters for their hard work to make the meeting possible. He noted that it had been an enjoyable stay and thanked participants for their valuable contributions.

The delegate of PAKISTAN thanked the government and the people of Egypt for their traditional hospitality, friendship and warmth. He congratulated the executive director and the Secretariat for organizing the 61st Plenary Meeting with success and excellence. He also thanked the delegates for exhibiting a spirit of cooperation and accommodation.

The delegate of TANZANIA joined other delegates thanking the government of Egypt for hosting the meeting and for a very warm hospitality. He also thanked the Secretariat for ensuring continuity between the ICAC meetings and for their hard work.

The delegate of CHAD thanked the government and the people of Egypt for a very warm, exceptional hospitality and a successful meeting in all respects. He noted that the effectiveness of the organizing committee and the Secretariat and interpreters assured the success, the consensus and the sense of compromise reached during the meeting. He thanked the outgoing chairman of the standing committee for his good work and wished Poland success in organizing the next meeting.

The delegate of UGANDA joined other delegations in thanking the government of Egypt, the organizing committee and sponsors for the excellent organization of the 61st Plenary Meeting. He highly appreciated the work of the ex-

ecutive director and the Secretariat and accepted Poland's invitation for next year's meeting.

The delegate of PARAGUAY expressed his gratitude to the government of Egypt and to all the sponsors and people who made the meeting a success, particularly Alcotexa and its chair, Mr. Amin Abaza. He congratulated the Secretariat for the dedication, attention and good will in responding to every problem and question arising during the meeting. He thanked everybody who contributed to a job well done and especially the outgoing chairman of the Standing Committee.

The delegate of GERMANY joined other delegates in praising all those who dedicated their hearts and brains to the success of the Committee's work. He pointed to the very positive spirit leading this conference which aimed at identifying problems and finding solutions, and expressed his hope that this spirit would be leading all future meetings of the ICAC.

The delegate of the USA added his appreciation to the government of Egypt and to all those who helped to organize the excellent meeting. He thanked delegates for the commitment they have demonstrated to the ICAC through their hard work and tireless effort. He said that he was looking forward to seeing all next year in Poland.

The delegate of UZBEKISTAN thanked the government of Egypt, Alcotexa and the Secretariat for the excellent organization of the conference and for a chance to learn more about the beautiful country of Egypt. He said that he was looking forward to the next meeting in Poland.

The delegate of TOGO joined other delegations

in his appreciation of all those who contributed to the success of the meeting. He thanked specifically the interpreters and the chairs of this and other sessions for their contribution to the success.

The delegate of GREECE expressed his gratitude to the host country for its warm hospitality and congratulated all the people who organized and worked hard for the success of this meeting.

The delegate of BELGIUM joined other delegates in thanking the government and the people of Egypt for a very warm reception. He appreciated the good organization and the successful meeting, praising the contribution of the chairs, the Secretariat and interpreters. He thanked Poland for its invitation to the next meeting.

The delegate of MALI joined other delegations thanking the government and the Egyptian people for their warm and friendly welcome. He thanked the organizers and the delegates for the fruitful discussions and conclusions reached at the meeting.

The delegate of BRAZIL joined other delegations in thanking the government of Egypt and all the organizers for such an outstanding meeting. He made a special comment praising the Egyptian people for their efforts to make everyone welcome and at home, providing everyone with all that was necessary for a delightful stay and work.

The CHAIR thanked the delegates for their kind comments encouraging them to visit Egypt again and adjourned the meeting.

Steering Committee

First Meeting

8:45 AM, Monday October 21, 2002
Mr. Alfonso Liévano in the Chair

The CHAIR thanked delegates for their support of the ICAC. He thanked the government of Egypt for serving as host of the 61st Plenary Meeting. He noted that the Organizing Committee led by Mr. Amin Abaza and Mr. Ahmed Elbosaty, with advice from Mr. Nabil El Marsafawy and with the assistance of Mr. Ihab Shalaby, had worked very hard to ensure the success of the meeting.

The CHAIR also extended his appreciation to the companies that were serving the cotton industry as sponsors of the 61st Plenary Meeting. The companies included Allbrecht Muller-Pearse & Co., Alcotexa, Aticot, Banque De Caire, Banque Misr, Bank of Alexandria, Cotlook Ltd. and Reuters, Egyptian-German Cotton Sector Promotion Program, El Watany Bank of Egypt, Export Development Bank of Egypt, Giza Spinning and Weaving, Modern Nile Cotton Company, Nassco, National Bank of Egypt, Plexus Cotton Ltd., Reinhart and Talaat Harb Cotton Company. He noted that the support of sponsors as well as the support of the participants in the trade booth exhibitions helped to strengthen the links between the Committee and the private sector, expanded the subject matter content of the meeting and helped to increase participation in the plenary meeting.

The CHAIR reported that the government of Egypt had nominated H.E. Dr. Atef Ebeid, Prime Minister of Egypt, as Chair of the 61st Plenary Meeting.

The CHAIR introduced Dr. Youssef Waly, Deputy Prime Minister and Minister of Agriculture & Land Reclamation; Dr. Youssef Boutros Ghali, Minister of Foreign Trade; Mr. Amin Ahmed Abaza, President, Alexandria Cotton Exporters Association; Mr. Hussein Yehya, Cotton Research Institute; Dr. Sayed Dahmouh, Former Chairman, Holding Company for Spinning & Weaving; Mr. Nabil El Marsafawy, Trade Holding Company; Mr. Galal El Rifai, Alcotexa; and Mr. Saad Nassar, Governor of Fayoum, who were to serve as Vice Chairs of the meeting.

The only item of business was to approve the agenda of the meeting. The CHAIR noted that delegates had a copy of the proposed agenda and asked if there were any objections or suggestions for changes. Seeing none, he found that the agenda was approved.

The meeting was adjourned at 9:00 AM.

Second Meeting

4:15 PM, Tuesday October 22, 2002
Mr. Alfonso Liévano in the Chair

The CHAIR recognized the delegate of AUSTRALIA. The delegate emphasized the importance of the subject of government measures to the world cotton economy. He said that he agreed with the statements of Argentina and Brazil during the Third Plenary Session that it was important to move forward expeditiously to reduce government measures. He said that the words "eventual elimination" should be changed to "elimination" in the Statement of the plenary meeting, and that the time frame for the elimination of subsidies in Working Paper I should be shortened from 2009 to 2005. He said that Australia is prepared to call for a vote on this issue if necessary.

The CHAIR introduced Mr. Felix Stiegwardt, Manager, MANUFACTURA DE PILAR S.A., Paraguay, as Chairman of the Private Sector Advisory Panel (PSAP), and asked him to present the report of the PSAP to the Steering Committee.

Mr. Stiegwardt delivered the report, which is a statement of the meeting. The major recommendations of the PSAP were that:

- The Secretariat should continue to implement the business plan.
- The ICAC should continue to emphasize the importance of good trading practices.
- The ICAC should encourage the work of the International Forum for Cotton Promotion (IFCP). He said that the PSAP supported the proposal to expand the Secretariat by adding a person devoted to cotton promotion.
- The ICAC should encourage the development of consumer-oriented quality standards.
- The Secretariat should continue to provide information on genetic engineering in cotton.
- And that additional information on price risk management is needed.

He also reported that Mr. Andrew Macdonald of Santista Textil S.A., Brazil, will serve as Chair of the PSAP during 2002/03.

There were no comments or questions from the floor.

The CHAIR thanked Mr. Stiegwardt and noted that the PSAP had been 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.

The CHAIR invited the Secretary General to read Working Paper II, "Election of Standing Committee Officers." The SECRETARY GENERAL reported that the Standing Committee had nominated Mr. Ajai Malhotra of India for the post of Chair of the Standing Committee, Ms. Chigozie Obi-Nnadozie of Nigeria for the post of Second Vice Chair and Mr. Luc Devolder of Belgium for the post of Second Vice Chair. Working Paper II is attached.

The delegate of BRAZIL thanked the Chair for the excellent job he had done during the past year. He observed that this had been one of the most active years ever for the Standing Committee. He supported the nominations as presented.

The CHAIR observed that there was a consensus to accept the recommendations in Working Paper II, and he extended his congratulations to the new officers.

The delegate of ARGENTINA also thanked the Chair for the work he had done and congratulated the incoming officers.

The CHAIR asked for comments on the proposal to expand the Secretariat in order to better support cotton market promotion.

The delegate of ARGENTINA supported the proposal saying that the Secretariat had a technical information specialist, and a specialist in promotion should be added.

The delegate of AUSTRALIA said that a job description for the new position was needed and that the proposal should be carefully considered in light of implications for the overall work program of the ICAC and the Secretariat budget.

The delegate of the USA said that the issue needed to be considered fully by the Standing Committee before a decision was made. He said it would be necessary to consider whether resources should be shifted within the Secretariat to provide for a marketing specialist or whether additional resources for a new position should be added. He observed that based on his work as Chair of the Subcommittee on Budget there would be resistance to any proposal to expand the budget by more than the rate of inflation.

The delegate of SOUTH AFRICA suggested that the Standing Committee should be instructed to investigate the proposal to add a promotion spe-

cialist to the Secretariat, and to develop a recommendation for consideration by the 62nd Plenary Meeting next year.

The delegate of BRAZIL observed that the original proposal had been to act upon the suggestion this year.

The CHAIR said that it would be appropriate and most expeditious for the Standing Committee on Budget to consider the matter in the course of its normal budget deliberations.

The delegate of AUSTRALIA suggested that the consideration by the Standing Committee might be completed by the end of the year.

The delegate of INDIA agreed that the Standing Committee was competent to decide the issue after considering the ramifications of the proposal for the budget and work program of the Secretariat.

The delegate of the USA said that there should be a two-step process. He said the first step would be to identify the specific work to be done by a marketing specialist, including a clear description of the purpose and goals of the position. The second step would be to consider whether new resources should be allocated for the position or whether current resources should be redirected.

The delegate of COLOMBIA said that there seemed to be a consensus that the Standing Committee be charged with the responsibility of considering the goals and objectives of the proposal during the coming year, working with the Secretariat to establish a job description and considering the impacts on the budget.

The delegate of the USA asked if the International Forum for Cotton Promotion (IFCP) had made a clear recommendation regarding the proposal.

The delegate of ARGENTINA said that he had confidence in members of the Standing Committee and the Secretariat to determine a job description for a new position and to consider the implications for the budget of the Committee. He said that the Standing Committee always made budget decisions and this decision should not be handled differently.

The delegate of CHAD supported the observations of the delegate of Argentina. He said that since the disappearance of the International Institute for Cotton in the early 1990s, the cotton industry had needed more support for promotion. He said that the proposal to hire someone in the Secretariat to head promotion activities was fully justified and that the Standing Committee was qualified to consider the matter.

The delegate of the UNITED KINGDOM agreed with the delegate of the USA that additional information from the IFCP would be helpful in guiding the decision.

The delegate of ARGENTINA asked the Chair

if he could explain the process he used and the persons he consulted in making the recommendation to the plenary meeting to add a promotion specialist to the Secretariat.

The CHAIR explained that he was aware of the need for increased work on promotion of cotton, and that participants in the Conference on Cotton and Global Trade Negotiations (CCGTN) had emphasized the need for more work to enhance the demand for cotton.

The delegate of SOUTH AFRICA said that the Standing Committee was competent to consider the proposal. The delegates of PARAGUAY, ARGENTINA and COLOMBIA agreed.

The delegate of TURKEY observed that the IFCP is composed of private national cotton industry organizations and is not organically related to the ICAC. He said that its recommendation would be informational only. He said that Turkey supports the proposal to mandate that the Standing Committee consider the proposal to hire a marketing specialist during the coming year.

The CHAIR found that there was a consensus to defer to the Standing Committee the proposal to include a position in the Secretariat to support market promotion activities. He said that in making its decision, the Standing Committee should consider fully the goals and purposes of the position, the job to be done by the individual, the implications for additional work by the Secretariat, and budget implications, including whether the position would be funded from a redirection of current resources or from new resources.

The meeting was adjourned at 5:50 pm.

ATTACHMENT

Working Paper II

Election of Standing Committee Officers

Recommendation from the Standing Committee

The nominating committee met on June 18, 2002 in the office of the Secretariat to propose a slate of officers for the Standing Committee for the coming year. Delegates from China (Taiwan), Colombia, Nigeria and the Philippines, and the executive director, were in attendance. Mr. Hsinhua (James) Wu of China (Taiwan) was elected as Chair of the Nominating Committee.

The Rules and Regulations specify that when practicable, the First Vice Chair be nominated to succeed the outgoing Chair and the Second Vice Chair be nominated to succeed the First Vice Chair. The current First Vice Chair of the

Standing Committee, Mr. Ajai Malhotra of India, will be able to serve as Chair next year, and the current Second Vice Chair, Ms. Chigozie Obi-Nnadozie of Nigeria, will be able to serve as First Vice Chair. Accordingly, there was a consensus to nominate Mr. Malhotra as Chair and Ms. Obi-Nnadozie as First Vice Chair of the Standing Committee next year.

The Rules and Regulations say that the election of officers should take into account:

1. Rotation on as broad a geographical basis as possible,
2. Adequate representation to importing and exporting countries, and
3. Ability, interest and participation in the work of the Committee.

After consideration of these factors, the Nominating Committee agreed that Mr. Luc Devolder, Minister-Counselor (Economic), Embassy of Belgium, should be nominated as Second Vice Chair. Mr. Devolder participates actively in the meetings of the Standing Committee, and he serves on the Subcommittee on Budget. Mr. Devolder represents an importing country. Accordingly, the Chair found that there was a consensus to nominate Mr. Devolder as Second Vice Chair of the Standing Committee during 2002-03.

The Standing Committee accepted the recommendations of the Nominating Committee at its 461st meeting on July 23, 2002.

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

Mr. Ajai Malhotra of India
for the post of Chair

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

Mr. Luc Devolder of Belgium
for the post of Second Vice Chair

Third Meeting

8:30 AM, Friday October 25, 2002
Mr. Alfonso Liévano in the Chair

The CHAIR asked Mr. Hussein Yehia Awad to present the report of the Committee on Cotton Production Research on the technical seminar that had been held on October 24. Mr. Awad reported that ten reports from seven countries had been received during the technical seminar on topics related to technology, management and processing for quality fiber. The Committee also reviewed topics for the 2003 Technical Seminar and reviewed preparations for the World Cotton Research Conference-3. His summary of the papers is attached.

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

The CHAIR reported that the Drafting Group had met the previous evening to prepare the draft statement. He thanked Mr. Eugene Brock of South Africa who had chaired the Drafting Group. The CHAIR asked the Secretary General to read paragraphs one and five of the draft of the statement, explaining that those were the only paragraphs from the draft presented by the Secretary General that had been altered by the Drafting Group. After paragraphs one and five were read, the CHAIR asked delegates for their comments.

The delegate of COLOMBIA noted an error in paragraph five; the phrase “most countries” in the first sentence should have read “member countries.” The CHAIR agreed with the delegate of Colombia. The CHAIR saw that there were no other comments on the draft statement of the 61st Plenary Meeting and found a consensus to approve the statement as corrected.

The CHAIR adjourned the meeting of the Steering Committee at 9:00 AM.

ATTACHMENT

Report of the Chair of the Committee on Cotton Production Research

Mohamed El-Moghazy
(Presented by Hussein Yehia Awad)

Mr. Chairman, ladies and gentlemen, the Committee on Cotton Production Research of the ICAC met during the Third Open Session. We discussed a number of issues very important to the cotton industry. We had ten papers from seven countries, and many other countries participated in the discussion and contributed to the meeting.

Low cotton prices have affected production of quality cotton while its demand has increased during the same time. A focus on Bt varieties, climatic changes and subsidies has also contributed to lower quality. According to Mr. Mario Rodríguez Rico of Colombia, a number of fiber quality characters have improved over the years, but low prices have affected area, and the number of farmers growing cotton has drastically been reduced in his country.

There is a lot of controversy, particularly in Europe, about the use of genetically engineered cotton, which is now commercially grown in seven countries in the world. Egypt has developed a biotic stress-resistant transgenic cotton and is close to its commercialization. Future plans include improving fiber length and strength through genetic engineering. According to Dr. Osama Momtaz of Egypt, a National Biosafety Committee has been established in his country,

and all other regulatory requirements have been completed. Giza 86 and Giza 87 have been transformed and are ready to be used.

According to Mr. Neal Gillen of the American Cotton Shippers Association, the criticism in Europe about transgenic products including cotton is driven by misinformation and hyperbole rather than “sound science.” Transgenic products have shown no negative effects on the environment. Transgenic and herbicide-resistant cottons have two major advantages in the form of high yield and low cost, which has convinced growers to produce such varieties. He concluded that transgenic cottons have been fully accepted in international cotton trade.

Egypt has formed a joint venture with Monsanto for developing transgenic varieties, but the cost of transgenic seed to farmers is not known yet. During the discussion, it was observed that there will be a need to control other insects not targeted by the Bt gene, but even then, Bt cotton can form a better component in IPM practices.

Australia is the highest, or second highest, cotton yielding country in the world. The average yield has increased at the rate of 23 kg/ha per year since 1964/65. Mr. Ralph Schulzé of the Australian Cotton Research and Development Corporation said that strategic planning is the key to success, and future directions must measure the performance of research. The Australian cotton industry has also made significant progress in environmental safety by reducing pesticide use and river water contamination, adopting Best Management Practices and improving production practices like water use, “Ingard” cotton, and minimum tillage. However, there is a need to control production costs.

Dr. Dean Joubert of South Africa emphasized the importance of an interdisciplinary approach for producing quality cotton. He observed that 50% of the contribution to fiber quality is based on the genetic ability of the plant, 20% on pest damage, 18% on agronomic management practices and 12% on the effect of diseases. The contribution of various factors/inputs in the production of quality fiber may vary among countries and even within countries, as do production practices. It was observed that it cannot be left to breeders to develop quality-improvement varieties, but it has to be achieved through better management practices.

Dr. Erfan Rashed of the Cotton Arbitration and Testing General Organization of Egypt stated that quality testing requires measuring good parameters as well as parameters that have negative impacts on quality, like trash, short fiber content and contamination. He reviewed the system followed in Egypt to produce the best quality cotton in the world. “Farfara” a special manual operation used to blend and produce uniform bales for export is still followed in Egypt.

Different classing and grading systems are used in the world and the need to adopt a uniform method was discussed. The Universal Cotton Standards exist, and standards boxes are updated every two years, but it is up to countries to adopt the standards or continue following their own standards. Dr. Rashed suggested establishing uniform standards on moisture and trash that are acceptable to all segments of the industry. He also proposed to introduce a quality assessment system whereby a ranking, or number of points, could be marked for each property based on its importance for the industry.

Dr. Mostafa Mohamed Kamal from the Cotton Research Institute, Egypt, explained the need and methodology used in the classification of cotton. He suggested that in order to eliminate the human error factor, instrument testing should be encouraged. The current manual classification systems around the world give an approximation of the degree of cleanliness, brightness or darkness. These systems in no way provide information on the spinning ability of cotton. Dr. Kamal observed that classification of cotton by grade has a value in the pricing system but we must measure more precisely such fiber quality characteristics to reflect the true spinning value.

Dr. M. Abdul Rehman of Egypt critically reviewed the role of various fiber quality parameters in the spinning performance of cotton. He observed that longer fibers sacrifice minimum strength and produce less end-breakage, thus resulting in a stronger yarn. Fiber strength is important because it is directly related to yarn strength, which is a combined and true expression of the total of all fiber properties. In addition to processing conditions, fiber fineness, maturity, length uniformity and short fiber content determine yarn evenness.

No matter how the best-quality cotton may be produced and how it may be tested and classed, its processing after picking has a significant impact on the ultimate quality of cotton delivered to the mill for spinning. Dr. Urania Kechagia of Greece stated that a series of decisions have an effect on quality starting from variety selection, a combination of agronomic practices, moisture condition at the time of harvesting, etc., but she emphasized seedcotton handling and ginning. Micronaire is one character which is not affected by ginning. Dr. Kechagia made a number of suggestions for the maintenance of quality during processing.

Many fiber quality testing methods used in the world are not perfect and need improvement. This is what was observed in the paper presented by Dr. Iwona Frydrych from Poland. HVI measurement of strength, short fiber content and color needs to be improved. Stickiness data by the Stickiness Contamination Tester and the high speed H2SD, both developed by CIRAD, do not correlate with Minicard. However, work done under a CFC/ICAC project in Sudan and France

does not support such a conclusion and has shown that suitable mixes of cotton can be produced for spinning sticky cotton without problems. However, the preparation of such mixes will depend on spinning conditions, including humidity and temperature. None of the available methods provide information on the reasons for stickiness. Dr. Frydrych also suggested that the industry should measure additional char-

acters that are not currently measured, and it should develop portable fiber testing equipment. Repeatability and reproducibility are important under all conditions.

The Committee on Cotton Production Research of the ICAC decided to hold the next technical seminar in 2003 on the topic "Effect of Advances in Processing Techniques on the Demand for Quality Cotton."

The Committee on Cotton Production Research also reviewed the preparations for the World Cotton Research Conference-3 to be held in Cape Town, South Africa, from March 9-13, 2003. ICAC member governments and the private sector are urged to encourage and support researchers in their countries to attend the WCRC-3.

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