Letter from the Executive Director

Kai Hughes

It has been more than a century since the world was in the grips of the last pandemic, the Spanish Flu, but things are so different now — mobile phones, satellites, global supply chains — that looking back at how the world recovered from a similar event a century ago doesn’t provide any useful guidance about what to expect today.

However, whilst the world ground to a halt and hunkered down, we saw it as an opportunity to raise our profile and extend our influence. We reviewed our everyday practices from the way we communicated to the way we worked and we collected data and information to inform decision makers around the world not only about what was happening in the cotton value chain but also the trends that were emerging from a population that was confined to their homes.

‘Whilst the world ground to a halt and hunkered down, we saw it as an opportunity to raise our profile and extend our influence’

Our flagship project, ‘Four Simple Steps to Sustainability’, which guarantees to double yields for small farm holders in Africa and Asia within three to five years, was in danger of grinding to a halt and we needed to maintain the momentum. We also needed to film our Virtual Reality training modules and test our interactive app. All of this required us to travel in a world where travel had essentially frozen. On numerous occasions the team of ICAC Chief Scientist Dr Keshav Kranthi and Project Consultant Dr Sandhya Kranthi demonstrated their ability to impart vast amounts of knowledge by training farmers and extension workers virtually in group videoconferences, thus ensuring the progress toward doubling yields in those countries continued despite the travel bans. As a result, hundreds of farmers were trained in Zambia, Chad, Cote d’Ivoire, Burkina Faso and Cameroon. The value of all the projects that we received funding for over the last couple of years was an incredible $2.67 million.

Nor was Covid enough to prevent World Cotton Day — an initiative that originated at the ICAC in 2018 — from being successful in raising awareness about cotton. On 7 October 2020 and again in 2021, the celebration was so successful that the C4 countries + Cote d’Ivoire submitted a draft resolution to have 7 October identified as ‘World Cotton Day’ on the United Nations permanent calendar — and the resolution passed.

A New and Improved ICAC Emerges to Lead the Industry’s Recovery

Whilst it is difficult to think of an event bigger than World Cotton Day, perhaps one of the biggest initiatives to come to fruition this year is the Private Sector Advisory Council which received the approval of the Steering Committee in July. This is a major initiative that brings together the private sector from the entire cotton value chain, from producer to brand, and more importantly will connect the private sector with governments at Plenary Meetings, giving them a voice to highlight global issues that affect them. That first opportunity will come at the forthcoming Virtual Plenary Meeting where they will be discussing ‘labelling’.

Despite Covid, the Strategic Plan is on track with over 80% of the Key Performance Indicators met. There have been some key staff changes, some associated with the Strategic Plan, which will enable us to become more effective and provide better support to our member governments.

The accounting function was brought back in-house and we welcomed to the team Mrs Alex Preston, who comes with a wealth of experience including in cotton. She is not only responsible for the ICAC finances but also the accounting functions associated with the various projects we are involved in.

We upgraded the Statistician role to ‘Data Scientist’ to reflect his increases activity on the ground through projects, training and manuals. This is a growing area and provides the ideal opportunity for ICAC staff members to connect directly with farmers, especially small farm holders in Africa and Asia, to make a real difference.

In conclusion, there are three themes critical to the future success of the ICAC: communication, partnerships and value addition. We are developing strong and long-lasting relationships with key partners who will stand us in good stead for the future and this will enable the ICAC to develop an even stronger leadership role within the cotton industry — and most importantly, to add value for all its members.

Matthew Looney joined us from Texas Tech University and will also be upgrading our database systems.

The newest Secretariat member is Kanwar Usman who joined us as Head of Textiles. This position is crucial for the ICAC as it seeks to increase the value it provides to consuming countries. Usman joins the Cotton Team with a wealth of experience having spent nearly all his life involved in textiles from working in spinning mills to being Director General of the Textile Division at Pakistan’s Ministry of Textiles.

Our youngest member of staff is Parkhi Vats, who joined us from the WTO just as the pandemic started to become the Commodity Trade Analyst — yet another new position in the Secretariat.

Finally, we should mention that Dr Keshav Kranthi’s job title was changed from Head of Technical Information to Chief Scientist to reflect his increases activity on the ground through projects, training and manuals. This is a growing area and provides the ideal opportunity for ICAC staff members to connect directly with farmers, especially small farm holders in Africa and Asia, to make a real difference.

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Letter from the Standing Committee Chair
Anshul Sharma

In one of the most unusual years in living memory, the ICAC found ways to demonstrate its leadership in the cotton industry and advance its core strategies in 2021

For Mahatma Gandhi, cotton and its associated grass-roots industries were the source of his greatest strength and hope for the populace. Cotton farming and related activities continue to play a major role in sustaining the livelihood of millions of people worldwide.

As a global think tank in the sector, the ICAC provides major institutional support and expertise to cotton farmers and downstream processors. Developing countries look to the ICAC to provide support for capacity-building of their scientists through international visits, fellowships and training programmes.

As mankind has come to realise, continued development without increasing sustainability has lost value in the current scenario. Accordingly, climate change and soil health have been the ICAC’s major themes for 2021. The ICAC is taking steps to educate the world on how sustainable cotton can be a major mitigating factor of climate change.

A major emphasis of the ICAC is on the promotion of sustainable cotton cultivation methods and the implementation of good agricultural practices. I am confident that the ICAC will continue to support transparency while helping the industry develop new sustainability indicators and measurement systems.

The Past Year

Due to the pandemic, no Plenary Meeting could be held in 2020. This year, the ICAC will hold a special online Plenary Meeting in December. Meanwhile, the ICAC Secretariat and Standing Committee members continued to regularly meet and work, often virtually. Among the vigorous activities taken were the ‘Cotton Connects’ interview series, a 100-page document on the effects of Covid-19 in countries around the world, numerous online conferences and field visits throughout the year. The ICAC developed a Soil and Plant Health app that is interactive and can speak to a farmer in at least 11 languages. The ICAC also hired its first-ever Head of Textiles. A hybrid Strategic Working Group meeting was held on 27 July 2021 to deliberate on the following themes:

- Value Proposition for Membership; Business Model for Attractive Plenary Meetings; and Increasing Engagement with Delegates. Its outcome will help to further fine-tune the framework of involvement of members in the ICAC activities.
- Due to the unexpected posting of the Chair ad Interim of the Standing Committee, Mr Selman Kurt, Foreign Trade Specialist, Embassy of Turkey, the following officers were nominated in the Steering Committee Meeting in December 2020, for the period between the Steering Committee in 2020 until the end of the Plenary Meeting in 2021: Mr Anshul Sharma, Embassy of India, as Chair; Mr Patrick Packnett, USDA, USA, as Vice-chair and Mr Selman Kurt as Immediate Past Chair.

My Sincere Appreciation

I would like to express my sincere appreciation and thanks to my colleagues in Standing Committee for their active participation in the functioning of the organisation. I would also like to thank the ICAC Secretariat for putting in long hours — in the virtual work space and in the field — to ensure that the ICAC continues to deliver value to the global cotton community.

‘I see God in every thread that I draw on the spinning wheel. The spinning wheel represents the hope of the masses’.  
Mohandas Karamchand Gandhi
ICAC BY THE NUMBERS

Social Media

ICAC has engaged in social media in a big way in recent years, establishing a dynamic presence on both Twitter and LinkedIn. Since the accounts were created in the mid-2018, their visibility and number of followers have grown at a rapid pace. In today’s fast-paced world, social media is one of the most important tools in our arsenal for keeping the marketplace up to date on ICAC publications, events and news releases — and to raise the visibility of cotton in consumers’ consciousness.

![Twitter](image)
Twitter
1630 Followers

![LinkedIn](image)
LinkedIn
1907 Followers

Major New Initiatives & Projects in 2020/21

- **VIRTUAL EVENTS**
  The impact of the pandemic will be felt for years to come — and the ICAC is adapting by bringing people together via technology.

- **TECHNICAL TRAINING WEBINARS**
  These are crucial to help keep researchers up to date on the latest developments since WCRC-7 had to be postponed until 2022.

- **WORLD COTTON DAY**
  In 2021, the ICAC’s mission was to encourage countries, businesses and individuals to participate in the 7 October celebrations.

- **ARTIFICIAL INTELLIGENCE**
  Incorporating AI into the Soil & Plant Health expert Virtual Reality Training Programme will make both technologies more effective.
ICAC Members

Standing Committee Officers, Delegates & Coordinating Agencies

ICAC Restructures its Approach to Standing Committee Officers for Greater Continuity

In 2020, the ICAC changed the structure of its Standing Committee Officers. The concern was that countries often reassign their ambassadors every few years, which means that the Second Vice Chair is often gone before they become Standing Committee Chair, or have to leave during their tenure as Chair.

Under the new format, there will be a Chair, a Vice Chair and an Immediate Past Chair. That ensures continuity and also takes advantage of the experience of the Immediate Past Chair, who can help the Chair acclimate to the position.

Patrick Packnett
Vice Chair - USA

Selman Kurt
Immediate Past Chair - Turkey

Anshul Sharma
Chair - India

Mr. Kurt is the Commercial Counsellor at the Embassy of Turkey in Washington DC — the same position he previously held at Turkey’s Embassy in Kenya. Earlier in his career, he also worked as a Foreign Trade Specialist.

Anshul Sharma is presently the Counsellor (Economic) at the Embassy of India in Washington DC. In the past, his work touched on a broad array of disciplines, including Commerce, Economic, Consular and Education matters.

Patrick Packnett is USDA’s Deputy Administrator of the Foreign Agricultural Service’s Global Market Analysis program area. His responsibilities include oversight of FAS’s market intelligence, trade and policy analysis and participation in the World Agricultural Supply and Demand Estimates process.

OFFICERS, DELEGATES, AGENCIES

ICAC ANNUAL REPORT 2021

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Argentina
Eng. Cecilia I. Marincioni
Embassy of Argentina
Office of Agricultural Affairs
Tel.: (1-202) 238-6444
Mr. José D. Molina
Minister Counselor
Embassy of Argentina
Office of Agricultural Affairs
Tel.: (1-202) 238-6446

Australia
Mr. Cameron Hutchison
Minister Counsellor (Agriculture)
Embassy of Australia
Department of Agriculture
Tel.: (1-202) 797-3318

Bangladesh
Md. Salim Reza
Commercial Counselor
Embassy of Bangladesh
Tel.: (1-202) 244-4698

Brazil
Mr. Gabriel Braga
Embassy of Brazil
Tel.: (202) 238-2768
Mr. Filipe Guerra Lopes Sathler
Agricultural Attaché
Embassy of Brazil
Tel.: (1-202) 238-2775
Mr. Renato Gurgel
Counselor
Embassy of Brazil
Tel.: (202) 238-2700

Burkina Faso
Mr. Hermann Yirigouin Toe
First Counselor
Embassy of Burkina Faso
Tel.: (202) 332-5577

Cameroon
Mr. Thomas Didyme Ondoa
Economic Counselor
Embassy of Cameroon
Tel.: (202) 265-8790

Chad
Mr. Tchingonbe Patchanne Papouri
First Counselor
Embassy of Chad
Phone: (202) 652-1312

Côte d’Ivoire
Mr. Assi Achi Herve
Commercial Counselor
Embassy of Côte d’Ivoire
Tel.: (1-202) 797-0300

Egypt
Mr. Ahmed Anter
Minister Plenipotentiary
Embassy of Egypt
Commercial & Economic Office
Tel.: (1-202) 265-9111
Mrs. Rabab Elgwily
Commercial Counselor
Embassy of Egypt
Commercial & Economic Office
Tel.: (1-202) 265-9111

European Union
Ms. Agnes Capony
Minister Counselor (Development)
Delegation of the European Union to the United States of America
Tel.: (1-202) 862-9582

India
Mr. Manoj Kumar Mohapatra
Minister (Commerce)
Embassy of India
Tel.: (1-202) 939-9855
Mr. Abu Mathen George
First Secretary (Commerce)
Embassy of India
Tel.: (1-202) 939-9828

Kazakhstan
Mrs. Gaukhar Kizatolla
Second Secretary
Embassy of Kazakhstan
Tel.: (1-202) 232-5488

Kenya
Mr. Abdirizak Musa
Trade Officer
Embassy of the Republic of Kenya
Tel.: (1-202) 387-6101

Korea
Mr. Jinman Ro
Commercial Attaché
Embassy of the Republic of Korea
Tel.: (1-202) 939-5670

Mali
Mr. Ibrahim Biridogo
Second Counselor
Embassy of Mali
Tel.: (1-202) 332-2249
H.E. Mr. Mamadou Nimaga
Ambassador
Embassy of Mali
Tel.: (1-202) 332-2249
Mr. Marico Keita
Third Counselor
Embassy of the Republic of Mali
Tel.: (1-202) 332-2249 x16
Fax: (1-202) 332-6603

Mozambique
Mr. Godinho Alves
Commercial Counselor
Embassy of Mozambique
Tel.: (1-202) 293-7146

Nigeria
Mr. A. W. Ado
Minister II (Economic)
Embassy of Nigeria
Tel.: (1-202) 294-9317

Pakistan
Mr. Arif Chaudhry
Senior Assistant
Embassy of Pakistan
(1-203) 501-84-40
Mr. Azmat Mahmud Khan
Trade Minister
Embassy of Pakistan
(1-202) 243-6500
Delegates

Russia
Ms. Viktoriia Kardash
Senior Counsellor
Permanent Mission of the Russian Federation to the United Nations
Tel.: (1-212) 570-62-98

South Africa
Embassy of South Africa
3051 Massachusetts Ave.NW
Washington, DC 20008 USA
Tel.: (1-202) 274-7989

Switzerland
Mr. Fabio Petrig
Scientific Advisor - Economic, Trade and Financial Affairs
Embassy of Switzerland
Tel.: (1-202) 745-7900

Taiwan
Mr. Wen-Ping Hou
Senior Officer - Economic Division
Taipei Economic and Cultural Representative Office (TECRO)
Tel.: (1-202) 686-6400 #5712

Togo
Ms Amelia Amavi Elikplim Kwadzo
Economic Counselor
Embassy of Togo
Tel.: (1-202) 234-4212

Turkey
Mr. Mustafa Koca
Chief Commercial Counsellor
Embassy of Turkey
Tel.: (1-202) 612-6780

Uganda
Mr. Michael Bulwaka
Counselor
Embassy of Uganda
Tel.: (1-202)726-7100

United States of America
Mr. Patrick A. Packnett
Assistant Deputy Administrator
Office of Global Analysis
USDA-FAS
Tel.: (1-202) 720-1590

Mr. James Johnson
Agricultural Analyst
USDA-FAS
Tel.: (1-202) 690-1546

Mr. Graham Soley
Agricultural Economist
USDA-FAS

Uzbekistan
Mr. Ruhihillo Zikrillaev
Counselor Trade & Economic Affairs
Embassy of the Republic of Uzbekistan
Tel.: (1-202) 530-7299

Zimbabwe
H.E. Mr. Amon Mutembwa
Ambassador
Embassy of Zimbabwe
Tel.: (1-202) 332-7100

Coordinating Agencies

Argentina
Eng. Luis Ramón Almirón
Undersecretary for Development of Regional Economies
Argentina
Tel.: (54) 114 436 7166

Eng. Jorge García
Advisor - Undersecretariat of Development of Regional Economies
Argentina
Tel.: (54) 364 463 8657

Australia
Mrs. Tamara Dadswell
Assistant Director
Department of Agriculture and Water Resources
Australia
Tel.: (61-2)6272-3359

TBD – Crops, Infrastructure and Biotechnology
Department of Agriculture and Water Resources, Crops, Meat and Horticulture Branch
Australia
Tel.: (61-2)6272-3363

Bangladesh
Dr. Gazi Golam Mortuza
Project Director
Cotton Development Board
Bangladesh
Tel.: (880) 9211-9835

Mr. Khen Chan
Deputy Secretary
Ministry of Textiles and Jute
Bangladesh
Tel.: (880) 2957-6546

Dr. Md. Farid Uddin
Executive Director
Ministry of Agriculture
Bangladesh
Tel.: (880) 9211-8907

Brazil
Mrs. Tereza Cristina Corrêa da Costa Dias
Minister
Ministerio da Agricultura, Pecuaria e Abastecimento
Brazil
Tel.: (55-61) 3218-2800

Mr. Guilherme Soria Bastos Filho
Secretary for Agricultural Policy
Ministerio da Agricultura, Pecuaria e Abastecimento
Brazil
Tel.: (613) 218-2507

Ms. Luciana Gontijo Pimenta
Coordenadora
Ministerio da Agricultura, Pecuaria e Abastecimento
Brazil
Tel.: (613) 218-2507
Coordinating Agencies

**Burkina Faso**
Mr. Wilfried Yameogo  
Directeur Général - Managing Director  
Société Burkina des Fibres Textiles (SOFITEX)  
Burkina Faso  
Tel.: (226-20) 970-024/25

**Cameroon**
Mr. Bayero Mohamadou Bounou  
General Manager  
Société de Développement du Coton (Sodecoton)  
Cameroon  
Tel.: (237) 2227-1685

**Chad**
Mr. Ibrahim Malloum  
General Secretary (Trade and Communication)  
COTONTCHAD SN (Société Cotonnière du Tchad - Société Nouvelle)  
Chad  
Tel.: (235) 6627-4100

Mr. Jacky Riviere  
General Manager  
Cotontchad SN (Société Cotonnière du Tchad- Société Nouvelle)  
Chad  
Tel.: (235) 2269-1530

**Côte d’Ivoire**
Mr. Adama Coulibaly  
Directeur Général Adjoint  
Conseil du Coton et de l’Anacarde  
Côte d’Ivoire  
Tel.: (225) 2020-7030

Mrs. Nathalie Assé  
Organizations Internationales des Produits de Base  
Côte d’Ivoire  
Tel.: (44) 207 462 0086

Mrs. Marie Claude Moussy  
Permanent Representative  
Côte d’Ivoire - Organisations Internationales des Produits de Base  
Côte d’Ivoire  
Tel.: (44-207) 462-0086

Mr. Simplice Gué  
Le Conseil du Coton et de l’Anacarde  
Côte d’Ivoire  
Tel.: (225) 2020-7030

Mr. Aly Toure  
Permanent Representative Ambassador  
Côte d’Ivoire  
Tel.: (207) 462 0086

**Egypt**
Eng. Mohamed Khalil Khedr  
Chairman  
CATGO- Cotton Arbitration & Testing General Organization  
Egypt  
Tel.: (203) 485-6546

**European Union**
Mr. Leonard Mizzi  
Head of Unit  
European Commission  
Belgium  
Tel.: (32)-229-80477

Ms. Zoe Drulie  
Policy Officer  
European Commission  
Belgium  
Tel.: (32) 296-4849

Mr. Regis Meritan  
Team Leader  
European Commission  
Belgium  
Tel.: (32-02) 265-6521

Secretariat of the Council of the European Union  
Tel.: (32) 281-6111

**India**
Shri. Sanjay Sharan  
Textile Commissioner  
Ministry of Textiles  
India  
Tel.: 23063192  
Fax: (91-11) 2379-4284

**Kenya**
Mr. Solomon O. Odera  
Director  
Fibre Crops Directorate  
Kenya  
Tel.: (254-72)-457-1006

Mr. Alex K. Mungai  
Assistant Director  
Fibre Crops Directorate  
Kenya  
Tel.: (254-71) 186-2071

**Korea**
Ms. Lorey Kim  
Assistant Manager  
Spinners & Weavers Association of Korea (SWAK)  
Republic of Korea  
Tel.: (822) 735-5747

**Mali**
Mr. Ba Boubacar  
Directeur Commercial  
Compagnie Malienne pour le Développement des Textile (CMDT)  
Mali  
Tel.: (223) 7645-7631

Mr. Nango Dembélé  
CEO  
Compagnie Malienne pour le Développement des Textile (CMDT)  
Mali  
Tel.: (223 76) 30 38 96

**Kazakhstan**
Mr. Bagdat Rustemov  
Department of the Production and Processing of Crop Products  
Ministry of Agriculture  
Kazakhstan  
Tel.: (7-172) 555-905
Mozambique
Eng. Yolanda Milena Gonçalves
Director General
Mozambique Institute for Cotton and Oilseeds
Mozambique
Tel.: (258) 21-431-015/6

Nigeria
Mr. Suleman Adebayo Audu
Director, Federal Ministry of Industry, Trade and Investment
Nigeria
Tel.: (234) 81 4440 044

Pakistan
Dr. Muhammad Ali Talpur
Director, Marketing & Economics Research Pakistan Central Cotton Committee (PCCC)
Ministry of the Textile Industry Pakistan
Tel.: (92-61) 920-1657

Russia
Ms. Anastasia Kalenova
Department of Multilateral Economic Cooperation and Special Projects
Ministry of Economic Development of Russia
Russia
Tel.: (7-495)-870-29-21

South Africa
Mr. Hennie Bruwer
CEO
Cotton South Africa
South Africa
Tel.: (27-12)804-1462/3

Switzerland
Ms. Daniel Lauchenauer
Program Manager
State Secretariat for Economic Affairs SECO Switzerland
Tel.: (41-58) 463-5380
Fax: (41-58) 462-8630

Taiwan
Ms. Wen-Lin Chu
Section Chief
Department of International Cooperation
Ministry of Economic Affairs Taiwan
Tel.: (886-2) 2321-2200

Turkey
Mr. Erbulent Kursun
Deputy DG of Exports
Ministry of Trade Turkey
Tel.: (90) 312 204 88 03

Uganda
Mrs. Jolly K. Sabune
Managing Director
Cotton Development Organisation
Uganda
Tel.: (256-414) 232-968

United States of America
Mr. Patrick Packnett
Assistant Deputy Administrator
Office of Global Analysis
USDA-FAS
USA
Tel.: (1-202) 720-1590
Fax: (1-202) 690-0727

Uzbekistan
Mr. Ramin Gasanov
Head Main Department Foreign Economic Relations
Ministry of Agriculture of Uzbekistan Uzbekistan
Tel.: (998) 908057325

Zimbabwe
Mr. Clever Isaya
Chief Executive Officer
Agricultural Marketing Authority Zimbabwe
Tel.: (263) 0242 308662 – 4

Mr. Martin Drevon
Deputy General Manager Operations Nouvelle Société Cotonnière du Togo (NSCT) Togo
Tel.: (228) 98 978282

Mr. Kpadenou Anani Kodjogan
Ministry of Agriculture - Agriculture Department for Privatization Process Togo
Tel.: (228) 902 98810

Mr. Ahmet Onur Ozturk
Head of Department Ministry of Economy - General Directorate of Exports Turkey
Tel.: (90 312) 425 7174
Creation of the Private Sector Advisory Council (PSAC)

On the promotion side, ensuring there was a successful World Cotton Day was the top priority — and it paid off in a big way. In late August, the United Nations approved a resolution submitted by the Cotton-Four countries (Benin, Burkina Faso, Chad and Mali) plus Cote d’Ivoire, requesting that 7 October be reserved for World Cotton Day on its permanent calendar. There was also a 50%+ increase in the number of organisations that posted their events on the official World Cotton Day website (www.worldcottonday.com). You can read more about the successes of World Cotton Day on page 52.

The sub-committee on Membership and Structure spent much of its effort on the plan to re-organise the PSAP into the PSAC, which involved changing from an individual-based membership of some 33 people to an organisation-based structure, and allowing only regional, national and international organisations to be members.

The new PSAC will be divided into four pillars — producers and ginners; merchants and cotton-related activities; spinners, weavers and machinery manufacturers; and brands and retailers — and thus will have representation from all sectors of the cotton supply chain (the first time any organisation has achieved that). Each pillar will have a Chair, plus two additional members on an Executive Committee, which will be responsible for coordination of topics between the pillars and bringing agreed-upon positions to member governments.

‘There was also a 50%+ increase in the number of organisations that posted their events on the official World Cotton Day website.’

Going forward, the PSAC will bring greater private-sector engagement at Plenary Meetings, bringing important subjects to the attention of member governments and providing an opportunity for representatives of governments and the private sector to have open, honest discussions in an informal setting at the beginning and then, if needed, to a more formal arena. The PSAC will focus on:

- Seed technology,
- Soil testing and health,
- Plant health,
- Technologies for high yields,
- Best practices in management of the crop canopy,
- Square retention and boll retention,
- Water, nutrients and weeds, and
- Pests, diseases, drought, salinity and climate change.
COMMITTEE REPORTS

International Cotton Researchers Association (ICRA)

The pandemic was able to delay the 7th World Cotton Research Conference — but it will be back in Egypt in October 2022

The Importance of Early Career Development

To achieve that goal, ICRA seeks to regularly hold international cotton conferences. The last one was the 8th meeting of the Asian Cotton Research and Development Network, which was organised in Tashkent, Uzbekistan, in 2019, under the auspices of ICAC, to formally present the ICRA award medal to early-career cotton scientists.

Close cooperation between ICRA and ICAC will materialise again during the 7th World Cotton Research Conference, WCRC-7, to be held in Sharm el-Sheikh, Egypt from 3-7 October 2022, after two years of delays due to the Covid-19 pandemic.

This event will provide up-to-date information on a variety of cotton research breakthroughs.

It is desirable that cotton researchers from all ICAC member countries be represented, particularly from developing countries. Both the ICRA and ICAC provide partial sponsorships for travel to each WCRC, but additional financial support is sometimes required to reach the target of increased developing-country participation.

A More Comprehensive Approach to Germplasm

ICRA is launching an initiative to promote the exchange of information on existing germplasm collections. ICRA is not suggesting changes in ownership or rules by which gene banks are currently managed in the respective countries. The lack of information is a major reason for the current low level of germplasm exchange.

The new initiative arises because some genetic material is preserved in various countries, but no single country can comprehensively evaluate each cultivar under various biotic and abiotic stresses.

International cooperation is the way to achieve a more comprehensive assessment of existing germplasm.

In mid-January 2021, Dr Michel Fok stepped down as the Chair of ICRA after four years in the position. Dr Mohamed Negm, Professor of Fiber and Cotton Spinning at the Cotton Research Institute in Giza, Egypt, served as the Executive Committee’s Vice Chair since 2016 and has been appointed as his successor. Dr Eric Hequet, Horn Distinguished Professor and Associate Vice President for Research at Texas Tech University, was appointed Vice Chairman and ICRA Treasurer.

In March 2021, the first edition of the Cotton Innovations newsletter was published. Cotton Innovations is a monthly publication from ICRA that provides current innovative information on cotton for breeders, growers, educators, manufacturers, and other stakeholders in the cotton supply chain. Cotton Innovations has been allotted ISSN in 25-03-2021.

Due to the COVID-19 pandemic, ICRA and the ICAC decided to print, publish and distribute the research papers that were received at the beginning of 2020 in a book containing more than 70 research papers; it will be distributed in the coming weeks.

Thinking about the Future:
Creating a ‘Cotton Encyclopedia’ for each country

Creating a ‘Cotton Diploma’ in whole cotton sciences: genetics, biotechnology, breeding, agricultural practices, cotton pathology, ginning, cotton fiber quality, spinning, knitting and woven, dyeing and finishing.'
As the only intergovernmental commodity body covering cotton that is recognised by the United Nations, the ICAC has always been responsible for representing the entire global supply chain but it hasn’t always done as well at that mission as it could have. However, the arrival of Kanwar Usman, the ICAC's new Head of Textiles, ensures that the organisation can provide exceptional value to all sectors of the supply chain, from farmer to retailer.

Usman, formerly the Director General of the Textile Division in Pakistan's Ministry of Commerce, officially started in his new position in August 2021. Due to his 20 years working in various sectors of the textile value chain — the last 14 of which were spent working as Director of R&D and then as Director General in the Textile Division of Pakistan’s Ministry of Commerce — he was chosen for this transformational role from a deep and talented pool of candidates. His educational achievements include receiving an MBA from the University of East London in 2004 and a Bachelor of Science degree in Textile Engineering (Spinning) from the National Textile University in Faisalabad, Pakistan.

**Why Hire a Head of Textiles?**

There has always been a need for the ICAC to offer exceptional value to consuming countries as well as producing ones, but recent changes have made the need even greater. World textiles trade has been shifting from raw materials to finished products and overall, the textiles trade has nearly doubled in value from $482 billion in 2004 to $871 billion in 2019 while world trade in cotton during this period has only increased from $11 billion to $15 billion.

‘Being the first-ever Head of Textiles is a very exciting role and for us in the ICAC, cotton is important — but textiles are equally important because it is considered a ‘starter sector’ that spurs industrialisation’, Usman says. ‘When the industry expands, it provides a base on which to build capital for more technologically demanding industries. In fact, the textiles and apparel sector is critical to the growth and development strategies of many developing and least developed countries’.

Another important aspect for the ICAC is that the transformation of cotton into textiles generates massive employment and value addition and its canvas is also much bigger. It has one of the longest industrial value chains and importantly, the garment sector is ideal for women employment and thus supports women empowerment as well.

The ICAC has always provided leadership for cotton and it now will do the same for the global textiles value chain, serving as a think-tank to deliberate on issues and propose solutions.

To fully realise that potential will require collaboration between a range of different stakeholders, including industry associations (within and across countries), universities, brands and manufacturing houses, which will strengthen knowledge exchange and drive innovation. Going forward, the ICAC will provide a platform for all stakeholders involved in the textile value chain, unlocking greater value addition and making rapid growth for members possible. The ICAC will take deliberations to a higher level to drive key changes including joint compliance requirements, increased trade and investment, co-financing arrangements between machinery manufacturers and textile-producing countries, additional training programmes and more efficient technology transfer.

A number of other advantages will present themselves as the process moves along, including:

- The inclusion of indirect allied industries such as machinery, chemical and accessories manufacturers.
- Tapping the potential of performance-based technical textiles used in the automotive, medical and construction industries, among others.
- Encouraging transparency and traceability through labelling across the textiles value chain to increase sustainability.
- Advising members on tactical changes including strengthening and broadening processing capabilities; bridging the infrastructure gap; developing sustainable textiles and apparel production capabilities; strengthening the allied supply chain; and marketing including e-commerce to fully utilise the potential of cotton and textiles value chain.
- Similar to the Cotton Data Book, the ICAC will develop a Textiles Data Book to provide the same level of insight and expertise to the textile manufacturing sector.
- The possibility of creating an annual sustainability award.

‘Finally, a lot of research has been carried out by the private sector and universities and it has to be compiled and shared among members to continue their development,’ Usman concludes. ‘We also would like to develop a portal to facilitate the dissemination of information the members. Finally, the ICAC now has the team in place to represent the complete value chain, from cotton to fashion’.
Meet the Secretariat - Matthew Looney

Addition of Data Scientist Enables the ICAC to ‘Tell Complex Stories with Numbers’

When the ICAC’s statistician left for another opportunity earlier this year, the organisation didn’t go looking for another statistician as a replacement. Instead, it hired a data scientist — Matthew Looney, who comes to the ICAC from Texas Tech University.

What is the difference between a statistician and a data scientist, you ask? Lots of people do so Matthew has an explanation ready for them.

‘The ICAC has evolved to the point where statistics needs to understand statistical modelling in order to support more complex machine-learning models. Without a strong foundation in statistics, a data scientist is at a significant disadvantage’.

Statistics is a very quantitative science that aims to answer questions using mathematical models and involves the collection and interpretation of numerical data. Data science, on the other hand, uses statistics — in addition to other fields of science — to both answer questions and tell stories using numerical data. It is often the complex storytelling aspect of data science where the two disciplines differ the most.

‘The world is a very complex place and in many situations, simple statistical models are unable to tell a complex story’, he says. ‘That is where data science comes in and pick-up where statistics leaves off’.

Formed in 1939, the ICAC had more than eight decades of cotton-specific data available to help model the cotton industry. However, historical data has its limits and can only go so far in helping to understand the future of the cotton industry. Modern machine-learning models can bring new perspective and new techniques to the classical problems.

For example, the ICAC is often trying to understand how governmental policies and trade dynamics will shape the future of the cotton sector. These types of questions are often too complex for basic statistical models. Using machine learning and unconventional datasets, however, can help bring a new understanding to how these policies and intergovernmental relationships will shape the cotton industry as a whole.

Matthew joined the ICAC on 20 September 2021, so he has only begun digging into the huge amounts of data.

Reproducible and Transparent

‘I am a big proponent of reproducible statistical reporting’, Matthew says. ‘In other words, I use a statistical scripting language to write reports and do statistical analysis in such a way that the results of the analysis are recorded and the exact steps and procedures used can be traced and audited’.

This serves two primary purposes:

1. It allows for complete transparency in how the analysis was performed. If there are ever questions about which exact numbers or method was used to arrive at a specific conclusion, the analysis can be reviewed for better understanding.
2. Having a recorded block of code allows for the reports and analysis to be archived for historical reasons.

He plans to have all reports and analysis conducted in such a way that the ICAC is utilising best practices in reproducible statistical computing. The first publications to follow these principles are ‘Cotton This Month’ and ‘Cotton Update’.

In the next five years, I would like to have advanced machine-learning models assisting with all aspects of production, consumption, trade and economic analysis’, he says. ‘Machine learning is a powerful tool that has, to date, been underutilised in the agricultural commodities. The cotton sector, in particular, is full of potential for incorporation of machine learning.

‘The world is a very complex place and in many situations, simple statistical models are unable to tell a complex story. That is where data science can step in and pick-up where statistics leaves off’.

‘I would also like to develop more advanced web portals for member governments to utilise. I envision these web portals as an interface between the ICAC members and the data and advanced analysis that the ICAC performs.

‘Currently the publications and reports written by the ICAC are static. In the future I wish to create these same static documents but also have companion documents in the form of web applications where more exploratory analysis can be performed in real time’.

For example, if a member is only interested in a single country or specific grouping of countries, a filter can be enabled to narrow the scope of the analysis. This will effectively put the power of machine learning in the hands of decision makers without the need for detailed knowledge of how these models are working under the hood.

‘In effect, this gives ICAC member governments a personal Data Scientist to assist them with their own analyses’, he concludes.
The 2020-22 ICAC Communications Plan

For the first time in 2019, ICAC created a multi-pronged, multimedia communications program that raises public, private and governmental awareness of the ICAC’s data, publications, conferences and research capabilities. It is updated and modified annually, as needed.

The plan includes:

- Traditional media such as press releases, ICAC reports and industry publications
- Social media, primarily Twitter and LinkedIn, which are key to promoting significant announcements, Plenary Meetings and major events
- In-person networking at events and conferences – both ICAC’s and those of other organisations that are attended by members of the Secretariat

**Virtual Meeting Capabilities**

**Adapting to Covid-19**

**Purpose:** Continue to disseminate critical industry information without the need to meet in person. Create a series of virtual sessions to address ICAC initiatives and the industry’s pressing topics

**Goal Achieved:** Cotton Connects interviews, WCRC webinars, online country meetings

**Social Media**

**Twitter, LinkedIn**

**Purpose:** Enhanced visibility, a more energised audience, greater engagement and opportunities with partners & private sector

**Goal:** By 1 January 2019, accumulate 300 Twitter followers and 150 LinkedIn followers (both goals exceeded)

**Goal:** Exceed 1,500 followers on each platform by September 2021 (goal exceeded, see page 9)

**Global Cotton Promotion**

**Maximum Visibility**

**Purpose:** To ensure the ICAC is leading the global effort to increase cotton consumption

**Goal Achieved:** Massive worldwide participation in World Cotton Day 2020 and 2021 (see page 52)

**Goal Achieved:** Regular feedback and contributions from the PSAP Promotion Subcommittee to generate new ideas for raising cotton’s visibility –> Creation of the Private Sector Advisory Council

**Member Outreach and Recruitment**

**More is Better**

**Purpose:** To maintain all current members, regain former members, and attract new ones, from both cotton-producing and -consuming countries

**Goal Achieved:** Increased revenue and resources continue to fund ICAC projects and multiple new staff members have been added, including the new Head of Textiles and Data Scientist

**Seville and Beyond**

**Purpose:** To help governments formulate policy that supports a healthy world cotton community

**Goal:** Increased attendance, both for greater collaboration and increased revenue

**Goal:** Integrate new technologies and approaches to increase participation through virtual meetings, including the annual Plenary Meeting

**Progress:** Not applicable. The 2020 Plenary was cancelled and the 2021 Plenary will be fully virtual
**USE OF VIDEO**

**Actions speak louder than words**

**Purpose:** Greater audience engagement by providing content in whatever platform the consumer prefers

**Goal:** Make highly scientific information more accessible and easier to understand for a non-technical audience and ensure we establish and maintain a connection to the new digital-savvy population

**Progress:** Great progress — Cotton Connects interviews, WCRC videos, World Cotton Day videos

**ANNUAL REPORT**

**Accountability and transparency**

**Purpose:** To provide both retroactive and forward-looking information about the operation and performance of the ICAC in advancing its major initiatives

**Goal:** To ensure ICAC members, partners and stakeholders are well-informed on ICAC past and future activities and to be transparent about the ICAC’s financial health and operational performance

**Progress:** Achieved in 2020 and 2021

**WORLD COTTON DAY**

**A global celebration**

**Purpose:** To encourage the world to celebrate cotton in a variety of highly visible and interactive ways and to mobilise the global cotton community to plan and execute their own celebrations

**Goal:** Develop stronger ties to the private sector and provide global media outlets with many opportunities to report on cotton’s critical role in providing income

**Progress:** Great progress — 60+ organisations participated in 2020 and more in 2021; creation of www.worldcottonday.com; countless social media posts; United Nations passed a resolution to make 7 October ‘World Cotton Day’ on its permanent calendar

**INTERNAL COMMUNICATIONS**

**Steering and Standing Committees**

**Purpose:** Report on Secretariat travels, activities and impact; keep members informed of how ICAC’s budget is being used

**Goal:** High member retention; increased participation and feedback from members in ICAC activities and initiatives

**Progress:** Partial. Retention hurt by Covid but we’re interacting with members more than ever online

**AGRICULTURAL AND MAINSTREAM MEDIA**

**Beyond ICAC publications**

**Purpose:** To increase coverage of ICAC statistics and publications, as well as to establish Secretariat members as global thought leaders

**Goal:** Increased article placements and use of Secretariat members as sources in articles

**Progress:** Positive — many article placements and increasing number of presentations delivered at industry events

**PARTNERING OPPORTUNITIES**

**Maximising efficiency and impact**

**Purpose:** To combine resources and expertise from disparate organisations for greater market impact

**Goal:** Better coordination, a more unified approach to the market, and less redundancy in the efforts of national and global cotton organisations

**Goal:** Engage partners for the biggest and most important initiatives, including World Cotton Day

**Progress:** Very positive — partnerships and/or projects in place with GIZ, Cotton Incorporated, Cotton Council International, the cotton/textile private sector, WTO, FAO and more
When the pandemic was at its worst, many daily activities had to be postponed or cancelled. Even if people would have been able to meet in person if they wore masks and practiced social distancing, most domestic and virtually all international travel was completely shut down.

But doing nothing was never a realistic option. Yields in Africa have continued to be stubbornly low, despite the industry spending nearly a billion euros over the last 40 years to raise them, so the ICAC had to find a new way. That new way is the Four Simple Steps to Sustainability programme, designed to double yields or bring them up to the global average in a mere three to five years. Some member countries also expressed an interest in beginning and/or improving organic cotton production, so the Secretariat began conducting training on those best practices as well.

In the end, Covid was able to prevent in-person training but happily, it failed miserably at preventing knowledge transfer.

The first thing to do was to develop the ‘Four Simple Steps to Sustainability’ programme which consists of four primary areas of training:

1. Cotton seeds,
2. Harvest index and hybrid seeds,
3. Cotton stalks, and
4. Naturally occurring biological controls.

This project guarantees to double yields within three to five years and/or elevate them to world average yields (currently around 800 kg of cotton lint per hectare). The programme utilises the ICAC’s Soil and Plant Health app, a voice-based tool designed for illiterate farmers, and the Virtual Reality Cotton Training Programme, which creates a virtual world around the user to assist trainers in the knowledge transfer of best practices.

About the Four Simple Steps Programme

The ICAC has observed that current production practices in a number of developing countries are lagging behind and need to be more environmentally, economically and socially sustainable to alleviate environmental pressures, improve water use efficiency, protect biodiversity, increase farm incomes, reduce poverty, protect human health and increase food security.
In most cases, meetings for the Four Simple Steps programme are split into two sessions.

For example, the first session for Cameroon was held on 7 July and began with a representative from GIZ, the project’s sponsor, presenting the context of the project. The objectives were introduced by ICAC Executive Director Kai Hughes while the participants talked about their needs and how they fit with the project’s objectives. The timeline of activities — including the production of training manuals, pocket books and videos, and conducting online training for 300 trainers — was presented and was followed by a question and answer session. ICAC Business Development Manager Caroline Taco facilitated live translation in French and English.

The second session was held less than a week later, on 12 July. Trainers from Cameroon participated in a one-day virtual exchange program to discuss organic cotton production details with an emphasis on seed and seed treatment; soil rejuvenation methods; management of weeds, insect pests and diseases; and layout of experimental trials in Cameroon. The ICAC’s Chief Scientist Dr Keshav Kranthi, Economist Lorena Ruiz, Project Consultant Dr Sandhya Kranthi and Caroline all participated in the meeting.

Among the expected outcomes upon completion of the project:

- An increase in the average seed-cotton yields to double their levels in three to five years without increasing the cost of cultivation. The project also aims to train farmers to reduce contamination through clean cotton-picking techniques which would increase the market value of their seed cotton.
- Ginners would greatly benefit from cotton that is clean and free of contamination.
- The most important outcome would be in terms of the renewed confidence of farmers who can enhance their yields in a sustainable and eco-friendly manner.

About the Organic Cotton Training Programme

In discussions with the ICAC last year, the government of Burkina Faso expressed an interest in expanding the domestic production of organic cotton so Keshav and Sandhya developed a formal training programme — a five-day virtual seminar. The training was intended to provide the growers with a basic understanding of global best practices so they could optimise organic cotton production.

The educational programme consisted of 17 videos and six PowerPoint presentations, all in French. The topics included:

- Seed choice and health
- Soil health
- Soil health amendments
- Cover crops
- Crop rotation
- Improved fallow
- Microbial management
- Integrated pest management
- Integrated nutrient management
- Small scale machinery
- Contamination and trash
- Testing of organic cotton
- Certification
- Prices

The presentations and videos were prepared in English and then translated into French, again by Caroline. In-house footage was used to prepare the majority of the video content.

Because Washington DC and Burkina Faso are in different time zones, the presentations and videos were played for the benefit of the participants in the morning Burkina time and the ICAC staff participated between 6:00 am to 12:30 pm local time. It was the first time this training was conducted and worked well for both the trainers and trainees.

There were 70 participants from Burkina Faso who assembled at two different locations and they represented all cotton growing regions of the country. The trainees were mostly agricultural technical experts but also included eight researchers from the Institute of Environment and Agricultural Research (INERA), led by Omer Hema, who provided the local practical technical expertise.

A pre-training test was followed by a post-training evaluation to evaluate the effectiveness of communication and all participants were presented with a certificate upon completion of the course.
In the early days of Covid, the initial shock about the extent of the pandemic wore off and people began to understand the implications for the coming year and beyond: a lockdown that would bring the global cotton and textile supply chain to its knees. The ICAC Secretariat saw that grim future coming and immediately took steps to ensure the industry would be able to continue functioning during the pandemic and be in the best possible position for a recovery once the virus was under control.

They began to reach out to industry leaders from different sectors to ensure that information continued to flow around the world. Even as trade was reduced to a trickle of its former size, Secretariat members knew the restrictions wouldn’t last forever and people would need to be aware of the situations in various parts of the world if the industry was going to get on the road to recovery once things improved. The industry is still struggling with the virus, which is far from completely eradicated, and the ultimate impacts Covid has had on cotton won’t be fully understood for quite some time. But the ability to develop good relationships and take advantage of modern videoconferencing platforms show that no matter what challenges the future holds, they can be overcome.

Every week from April to August, a different member of the Secretariat recorded one of the interviews. Furthermore, the ICAC took advantage of the diversity in its team by doing interviews in multiple languages with English subtitles.

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Who Was Interviewed — and Why

In recent years, the ICAC made it a priority to further develop its relationships with other cotton and textile organisations around the world and that effort paid off in a big way. From farmers to textile manufacturers and everyone in between, industry leaders from across the globe shared an update on their part of the world and shared their thoughts and advice for how the industry can survive the crisis.

Alan McClay, CEO of the Better Cotton Initiative, discussed damage mitigation strategies. Dr Christian Schindler, Director General of the International Textile Manufacturing Federation, reported on the findings from the surveys they conducted among their member organisations. Dr Rubana Huq of the Bangladesh Garment Manufacturers & Exporters Association talked about the terrible plight of the poor textile workers in Bangladesh whose lives were turned upside down when orders dried up and retailers were refusing to meet their contractual agreements. Namissa Thera, a fashion designer and entrepreneur in Mali, highlighted the risks and dangers of fast fashion.

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The project was so successful that representatives from Taiwan created their own Cotton Connects video, in which they interviewed workers at a leading domestic textile company, a research institute and a textile promotion agency to get their insights from different perspectives. Although they vary in length from one interview to the next, Taiwan’s entry was on par with most of them at about 12 minutes in length.

The industry is still struggling with the virus, which is far from completely eradicated, and the ultimate impacts Covid has had on cotton won’t be fully understood for quite some time. But the ability to develop good relationships and take advantage of modern videoconferencing platforms show that no matter what challenges the future holds, they can be overcome.
One of the most valuable things the ICAC offers is an intervention tailored to a country’s specific needs. While much of the ICAC’s work is general in nature — producing its vast array of publications, representing cotton at meetings of international organisations and leading the global World Cotton Day celebrations, for example — sometimes a member requires something more specific.

That’s where Country Meetings come in. These ‘deep dive’ discussions enable ICAC members to identify specific challenges they’re facing in their domestic cotton and textile industries to see what the organisation can do to help. Traditionally they have been held in person whenever possible but with Covid’s travel restrictions, face-to-face meetings have been a challenge over the last 18 months.

But challenges and problems don’t wait for a more convenient time to be addressed, so the Secretariat turned to one of the most important of all tools during the pandemic — videoconferencing. And they turned to it often in 2021, holding a dozen meetings with a variety of countries and providing the advice and assistance the countries needed, as summarised below:

**February 2021**

**Cameroon:** Discussions centred on the 10-million-Euro soil health project already in place with GIZ and the European Union; how to increase ginning percentage from 40 to 43; and how to increase productivity and shift from hand picking to machine harvesting.

**Mali:** Among the challenges they requested help with were how to manage low yields and volatile prices; ways to improve soil health in the mid-to-long term; and how to offset input shortages.

**Pakistan:** Topics included low seed germination percentage; attacks from locusts and other pests; and lowering the overall cost of production.

**Togo:** One of the top goals is to implement the Four Simple Steps to Sustainability programme in-country as soon as possible; the status of organic cotton demonstration farms; and how to increase mechanisation.

**March 2021**

**Egypt:** The country seeks to increase production in coming years without sacrificing quality; eliminate contamination at gins; and protect Egyptian cotton’s reputation in international markets.

**Kazakhstan:** Farmers are eager to schedule a workshop with ICAC researchers to help raise yields; they want to know more about organic cotton cultivation; and they need help dealing with a persistent bollworm infestation.

**Uganda:** Discussions focussed on ways to help farmers gain better access to inputs; the challenges posed by the unusually low water table; and to express the country’s interest in the Four Simple Steps to Sustainability programme.

**April 2021**

**Bangladesh:** Representatives requested help in acquiring cotton seeds from Australia, the USA and Brazil amongst others; help devising strategies for domestic cotton production; and a need for research assistance.

**Kenya:** Talks emphasised the need to schedule a brainstorming session to find cost-effective strategies for farmers; ways to produce high-quality seeds; and strategies to cope with the glut of second-hand clothing in the marketplace.

**Tanzania:** Discussions focussed on the need to incorporate Swahili into the ICAC Soil & Plant health app; how to reduce spacing in fields; and strategies to improve germplasm and deal with sucking pests.

**Zimbabwe:** The conversations involved methods for increasing yields in one of the country’s strategic crops; overcoming a lack of access to inputs; and attracting private-sector investment.

**May 2021**

**Taiwan:** Representatives wanted to discuss how to recover form the country’s 18% decline (2020 vs 2019) in textile exports and take advantage of newly opened markets; highlight the plans for World Cotton Day 2021; and how Taiwan can benefit from the ICAC’s new Private Sector Advisory Council (PSAC).

These targeted and tailored meetings are one of the most valuable benefits of belonging to the ICAC. When a member needs to take advantage of the ICAC’s experience, expertise and global network of cotton researchers, the Secretariat won’t allow a mere virus to get in the way.
Since its founding in 1939, the ICAC has continually reinvented itself to ensure it is providing the greatest possible value to its Member governments as well as to the cotton community as a whole. That evolution continued in 2021 with multiple new additions to the Secretariat to provide new capabilities as well as a continuing focus on harnessing innovation and hands-on knowledge transfer to change the lives of millions of the most vulnerable people in the world.

Membership in the ICAC provides tangible benefits in the form of:

1. Increased access to statistics and critical technical information provided by the Secretariat at no charge. The subscriptions to the ICAC’s publications would cost thousands of dollars if purchased separately.

2. Enhanced participation in collaborative interactions in the ICAC’s global network on cotton research and development. There are thousands of scientists in the ICAC’s global research network and their work is used to benefit all ICAC member governments.

3. Engagement in cotton projects involving the ICAC. There are multiple projects underway right now, all of which are designed to raise yields, improve sustainability, increase farmer income and improve the efficiency of the cotton supply chain.

4. Equality among nations. All ICAC members have an equal voice in the ICAC Steering Committee, no matter how big or small. In addition, assessment fees are based on the amount of trade countries do each year to ensure they all pay a fair share.

5. Assistance when and where cotton needs it. If there is a problem in a member country, such as the emergence of a new disease or pest, the ICAC will put feet on the ground to address the issue. In addition, the ICAC’s newest technologies — a voice-based app for illiterate farmers, a four-step training regimen for increasing yields and a Virtual Reality training programme — are made available to member governments at no cost.

6. A unified voice for the entire supply chain. The ICAC is the only intergovernmental commodity body recognised by the United Nations that covers the entire cotton industry, so the Secretariat has members with expertise in all sectors of the supply chain, from growing through textile production.

7. Extensive communication with the private sector. In 2021, the ICAC will put into place its Private Sector Advisory Council, which is made up of national, regional and global organisations to facilitate interaction between member governments and the private sector. When it was officially launched in November 2021, the PSAC became the only organisation in the world that draws representation from every sector of the cotton value chain on the same platform.

And, perhaps most importantly, membership provides the opportunity for governments and national organisations to join fully into the fraternity of cotton countries. This unity is key when discussing cotton issues of international scope and significance and when formulating global policy through the ICAC’s annual Plenary Meetings.
About the ICAC

The ICAC is an organisation of currently 29 members with an interest in cotton and the textile value chain. Formed in 1939, it is the only intergovernmental body for cotton producing, consuming and trading countries and is one of only seven International Commodity Bodies recognised by the United Nations.

There are currently 11 members of the Secretariat originating from seven different countries — Colombia, England, India, Kenya, Martinique, Pakistan and the USA — who work together from one office in Washington. The ICAC was formed by governments to deal exclusively with technical, statistical and policy matters related to cotton, and now the entire supply chain including textiles manufacturing, brands and retailers.

What the ICAC Does

The ICAC is the premier source of international data on the global cotton industry. The Secretariat forecasts cotton supply, demand and prices, estimates cotton supply by type and tracks exports by destination and imports by origin. It also measures and forecasts cotton end-use consumption and cotton’s share of textile fibre demand in the world and by region. It is also the primary source of world textile fibre end-use consumption. Finally, the Secretariat reports on government measures affecting production and trade in cotton and reports to the WTO twice a year on these issues. The ICAC also has a permanent representative on the UNCITRAL Council to cover issues of contract sanctity.

The ICAC has several networks used to promote the dissemination of cotton research knowledge:

1) The ICAC Research Associate Program, an annual training program for up to 20 cotton researchers.

2) There are four regional cooperative cotton research network meetings covering four geographical areas — Asia, Latin America, South and East Africa and the Mediterranean and the Middle East — with a fifth network being launched to cover West Africa shortly. These network meetings are held every two years with a World Cotton Research Conference coordinated by the ICAC held every four years.

The Technical Information Section periodically addresses key issues confronting cotton farming and cotton processing by collating and synthesising scientific knowledge accrued from global experiences. It coordinates the World Cotton Research Conferences that are held once every four years. Additionally, it conducts four regional cooperative network meetings of Africa, Asia, Latin America and the Mediterranean region once every two years. The TIS produces the quarterly scientific magazine, THE ICAC RECORDER, the triennial books on cotton production practices, cost of production and research infrastructure; books and bulletins to apprise all stake holders of current issues, events and also to highlight the latest technological advances in R&D.

In addition, the Technical Information Section conducts analytical research on global trends in the sustainable use of water and agrochemical inputs, so as to identify and highlight core areas in specific member countries for improvement in sustainability. The Secretariat has kept abreast of new developments in production research, including organic cotton production, transgenic cotton and developments in fibre testing equipment like HVI.

The ICAC is involved in the development of a number of innovative projects designed to assist farmers, particularly to help small farm holders, increase yields. These include the development of a Soil and Plant Health app and Virtual Reality training programmes. It has also launched a global cotton initiative in conjunction with the WTO, FAO, ITC and UNCTAD called ‘World Cotton Day’. The global response to the initiative has been so positive that the United Nations has reserved 7 October of each year as World Cotton Day on its permanent calendar.

Value for the Textile Industry

There has always been a need for the ICAC to offer exceptional value to consuming countries as well as producing ones, but recent changes have made the need even greater. World textiles trade has been shifting from raw materials to finished products and overall, the textiles trade has nearly doubled in value from $482 billion in 2004 to $871 billion in 2019 while world trade in cotton during this period has increased from $11 billion to $15 billion. The 2021 hiring of a Head of Textiles reflects that changing dynamic.

To fully realise that potential will require collaboration between a range of different stakeholders, including industry associations (within and across countries), universities, brands and manufacturing houses, which will strengthen knowledge exchange and drive innovation. Going forward, the ICAC will provide a platform for all stakeholders involved in the textile value chain, unlocking greater value addition and making rapid growth for members possible. The ICAC will take deliberations to a higher level to drive key changes including joint compliance requirements, increased trade and investment, co-financing arrangements between machinery manufacturers and textile-producing countries, additional training programmes and more efficient technology transfer.

A number of other advantages will present themselves as the process moves along, including:
The ICAC has a number of committees and working groups exploring areas of interest to both producing and consuming countries. These include:

- The inclusion of indirect allied industries such as machinery, chemical and accessories manufacturers.
- Tapping the potential of performance-based technical textiles used in the automotive, medical and construction industries, among others.
- Encouraging transparency and traceability through labelling across the textiles value chain to increase sustainability.
- Advising members on tactical changes including strengthening and broadening processing capabilities; bridging the infrastructure gap; developing sustainable textiles and apparel production capabilities; strengthening the allied supply chain; and marketing including e-commerce to fully utilise the potential of cotton and textiles value chain.
- Similar to the Cotton Data Book, the ICAC will develop a Textiles Data Book to provide the same level of insight and expertise to the textile manufacturing sector.
- The possibility of creating an annual sustainability award.

The ICAC Task Force on Commercial Standardisation of Instrument Testing of Cotton (CSITC) which serves as the basis for international cooperation among cotton testing laboratories. Round Trials organised by the CSITC encourage standardisation in cotton instrument testing, help participating cotton test centres to improve and ensure that their results are on the same level as other test centres around the world.

The ICAC Expert Panel on Social, Environmental and Economic Performance of Cotton Production (SEEP) works to provide information about the impacts of cotton production and recommends policies and practices to governments for improvement. Whilst this committee has primarily looked at sustainability issues and is currently engaged in developing a global sustainability index recognised by all governments, the work of this committee will now also move towards traceability and reaching agreement on what traceability should measure.

The ICAC Private Sector Advisory Council is a panel of leading experts from the private sector covering farmers, spinners, merchants, private sector organisations such as BCI and retailers. They advise and help governments in reaching their policy decisions. Currently the ICAC sits on the International Advisory Group for the implementation of an e-Phyto certification system and liaises extensively with private sector companies to ensure that the system is both efficient and practical.
Cotton Market Report

West African cotton production set to make a full comeback after undergoing a painful, Covid-ravaged 2020/21 season

World cotton production for the 2021/22 season is poised for a full comeback from a disappointing 2020/21 season. Current estimates put world production at 25.71 million tonnes. This is a 6.01% increase over the 2020/21 season of 24.26 million tonnes. This increase is largely driven by the United States which is currently reporting 3.91 million tonnes, an increase of 739,000 tonnes over the 2020/21 cotton season.

However, of the five largest cotton producers in the 2020/21 season — the United States, Brazil and Pakistan — are expected to increase in 2021/22, with China and India reporting declines. World production has still not fully recovered to pre-pandemic levels but has made up significant lost ground.

In Africa, specifically West Africa (Francophone Africa), we are seeing a slightly different story. All West African countries are reporting production increases with Benin and Mali leading with 382,000 and 340,000 tonnes, respectively. In West Africa, production is up nearly 47.8% over the production numbers of the 2020/21 season. Benin, Burkina Faso, Cameroon, Chad, Côte d’Ivoire, Mali, Senegal and Togo, are all currently on pace to exceed the prior year’s production totals.

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While it is difficult to know if these production numbers will stand, the fact that all of the West African countries are reporting positive increases is an encouraging sign for the future of cotton in Africa. The largest increase in production is being realized by Mali.
The Advantages of Hosting an ICAC Plenary Meeting

Good things happen when governments focus on leading global policy discussions and promoting their private sector businesses

The ICAC’s mission is ‘to serve the cotton and textile community through promotion, knowledge sharing, innovation, partnerships and providing a forum for discussion of cotton issues of international significance’.

That mission is at the forefront of all our activities and events and we would like to invite you to be part of that journey. As the only intergovernmental commodity body representing cotton that is recognised by the United Nations, the ICAC alone can bring together, under one umbrella, the whole cotton value chain — researchers, producers, ginneries, merchants, spinners, brands, retailers and consumers and, of course, governments.

What Is a Plenary Meeting?

Held annually, Plenary Meetings consist of three days of educational sessions preceded by a day of internal activities when ICAC committee members gather in person to discuss topics of significance. There is a formal dinner reception during the meeting and after the sessions end on day three, many attendees stay for an additional two days to participate in the Technical Tour, which gives people an up-close view of the host country’s cotton and textile industry in action.

Who Attends a Plenary Meeting?

Attendees come from ICAC Member countries but also from non-Members as well. They represent the entire global supply chain: producers, ginneries, merchants, logistics and controlling professionals, extension services agents, transporters, equipment manufacturers, researchers, certification and insurance agencies, spinners and garment manufacturers, banks and many more. When it comes to cotton and textiles, everyone is welcome and involved in the discussions.

How Does a Country Benefit from Hosting a Plenary Meeting?

A Plenary Meeting brings not only knowledge to the participants — it gives them a voice in debates on topics of common interest and thus a say in government policy-making on the International level. Vivid examples include our engagement in the debate about labelling, more than 10 years of advancing the international standardisation for cotton fibre equipment testing, the development of sustainability indicators in this context of global warming and many more.

We are not merely reacting to events and needs for international standards on the market — we are looking at the future and proposing concrete solutions to help the cotton and textile industry deal with climate change, price volatility, demand shifts and projections on national and global stocks.

Specific benefits come in the form of:

- New commercial relationships, both in-country and with the international marketplace;
- Greater interaction between government officials and the private sector to ensure that a country’s resources are aligned with needs of its domestic industry;
- Each year, the ICAC’s new Private Sector Advisory Council (PSAC) will choose one topic of enormous interest to cotton and textile businesses around the globe; the host country gets to take the lead in those discussions during each Plenary Meeting;
- The post-event Technical Tour allows member countries to display the capabilities and advancements made by their cotton and textile industries, which is a critical step in attracting outside investment;
- The unique ability to develop relationships that pay dividends in that year and beyond, including greater communication among members of the global research community and new commercial opportunities; and
- Increasing government-to-government collaboration in areas of mutual interest.

When you host a meeting, you have all those interested parties coming to visit your country to meet their counterparts, negotiate contracts and more, giving your private sector and your government officials an unparalleled opportunity to discuss and negotiate with the entire value chain — all under one roof, over the course of just a few days.
United Nations Reserves 7th October as World Cotton Day on Permanent Calendar

There weren’t a lot of positive and exciting developments over the last two years as the cotton industry — and entire world — grappled with a global pandemic.

But there was at least one fantastic development in August and it came from the United Nations, which announced it would forever reserve 7 October as World Cotton Day on its permanent calendar. From a concept born at the ICAC in 2018 to one of the few days deemed significant enough for a permanent spot on the UN calendar, the global celebration of cotton has come a long way in a short time!

In 2020, we all faced a two-headed challenge: The first was getting people to participate by arranging their own activities to celebrate World Cotton Day in their communities, and of course the second was the coronavirus. But even those weren’t enough to derail the momentum of World Cotton Day 2020, which actually exceeded our expectations. For the first time, we built an official World Cotton Day website, where 19 organisations went to post their content. We don’t actually know how many people and organisations were active participants in World Cotton Day but we know it was celebrated by more than 60 countries, companies and organisations.

Getting Our Money’s Worth

For World Cotton Day 2021, we rallied the industry again — and again the industry responded, exceeding all expectations. We tracked the performance of #worldcottonday as well as the theme, #cottonforgood, and we were stunned at how fast this celebration has grown. Those two hashtags were used more than 630 times and reached more than 4.0 million people. Online software estimates the amount of money we would have to spend on advertising to reach the same number of people was more than $390,000.

As its contribution, the ICAC created two videos, the first explaining how cotton helps fight climate change and the second explaining the theme ‘Cotton for Good’. Both were well-received and will provide value for a long time to come.

It’s going to be hard next year to top the UN announcement we got in 2021 — but we’re ready for the challenge!