



INTERNATIONAL COTTON
ADVISORY COMMITTEE

THE FINAL STATEMENT OF THE 77TH PLENARY MEETING



77th plenary meeting
Abidjan - Côte d'Ivoire - dec. 2018



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“Cotton Challenges: Smart and Sustainable Solutions”

1. The International Cotton Advisory Committee (ICAC) met in Abidjan, Côte d’Ivoire from 2 through 6 December 2018 for its 77th Plenary Meeting since the establishment of the committee in 1939. The meeting was attended by 385 persons including 22 Member governments, 6 International Organisations and 15 Non-Member governments.

2. Production: The Secretariat is projecting world cotton production for 2018/19 season at 26.12 million tonnes, down from 26.75 million tonnes in the previous season, due to a reduction in planting area, water availability, and limited improvements in yields. Consumption growth has slowed during the period but at 26.8 million tonnes is currently projected to exceed production. Global stocks are expected to decrease overall, leading to a projected stable or a slight increase in cotton prices over the course of the season. Though stock levels in China are reduced, stock levels elsewhere in the world are expected to increase, thereby presenting a total of 18.2 million tonnes against 18.8 million tonnes at the end of the previous season.

3. Future Demand: The Secretariat forecasts that total fibre demand will increase to 121 million tonnes by 2025, implying 25.5 million tonnes of additional demand between 2017 and 2025, which represents an important opportunity for the cotton sector. The Secretariat projected that by increasing the average world cotton consumption per capita to 4 kilograms (the level observed in 2007), the cotton industry would be able to satisfy 28% of the additional projected demand for fibres. If cotton yields in India and sub-Saharan Africa were as high as the world average, cotton production would increase by 5.3 million tonnes.

4. Government Support to the Cotton Sector Increased in 2017/18: The Secretariat reported that even though market prices rose and minimum support price programs were not triggered in a number of countries, ICAC’s annual report on government measures for cotton shows that an estimated value of the support, including border protection, direct subsidies and crop insurance aid, increased by 33% in 2017/18 to US \$5.9 billion from US\$4.4 billion in 2016/17, principally due to increased production.

5. Combating the Effects of Climate Change on Cotton: The Intergovernmental Panel on Climate Change (IPCC) projected that climate change will result in a substantial loss in agricultural productivity. About 56% of the global cotton area is dependent on rain, and water stress can lead to significant reduction in yields. Climate change may introduce heat waves, increasing risks of enhanced insect pest problems, also bolls with reduced weight and poor boll retention, thereby leading to yield losses and deterioration in fibre quality. The Committee was informed that increased levels of atmospheric CO₂ may lead to higher yields. The Committee urged governments to encourage the development of climate-resilient cultivars with high water-use-efficiency, high nutrient-use-efficiency and with potential to adapt and withstand unpredictable drought, changes in heat, waterlogging, increased insect pests and diseases.

6. Mechanisation, Drones and Robotics for Small-Scale Farms: Cotton is a labour-intensive crop in developing and least-developed countries. Labour shortages and higher wages in nations where cotton is currently manually harvested may result in delayed harvesting, thus leading to quality deterioration. Even for small farms, mechanisation could enhance efficiency and reduce costs. The costs of manual picking in some countries are about US\$100 to US\$120 per tonne, and an economical mechanical cotton picker could increase efficiency by 5 to 10 times compared to manual picking. The Committee was informed that recent advances in drones and robotics open new avenues and opportunities for their deployment for small-scale cotton production systems, for multiple activities relating to the management of the crop.

7. Technical Seminar: Combating Pest Resistance to Biotech Cotton and Pesticides: Insect resistance to Bt-cotton and weed resistance to herbicides have emerged as challenges to the efficacy of biotech cotton across the world. The phenomenon of resistance is currently being countered by adding more and more new genes to develop new biotech varieties. However, the addition of new genes takes time and indirectly increases production costs. As such, the emergence of *Bt*-resistant bollworms poses a new challenge to cotton crop production systems, whilst the recent instances of pink bollworm resistance to Cry1Ac and Cry2Ab proteins will have serious consequences. Insecticide-resistant whiteflies not only cause severe crop damage, but also transmit the cotton leaf curl virus. Bollworms, whiteflies and cotton leaf curl virus can cause debilitating effects on cotton production. The Committee noted the presentations and their recommendations to endorse a rigorous pest resistance management strategy together with growers and the industry.

8. Inter-Governmental Policies on Seed-Exchange: The Committee was informed that the exchange of seeds (germplasm) between countries can facilitate progress in agriculture. The narrow genetic base available for cotton improvement in major cotton-producing countries — and the ever-changing market demands for specific fibre qualities, along with the need to improve yields — make seed exchange important across countries. Access to new germplasm holds the key to genetic improvement, enhancement of genetic diversity, and expanding genetic variability for useful traits. The

speakers recommended that governments develop a roadmap to create a global platform that operates as a smooth and trustworthy channel of seed exchanges amongst countries across borders. They were also urged to create an International Cotton Research Institute under the CGIAR system, which could act as a research and educational institute and a global repository of germplasm sources that could be freely shared.

9. Biotechnology: The Committee was informed that new biotechnology tools (NBTs) are being used to enhance the performance of commercial cotton varieties. Scientists in Latin America are using these new tools in the form of Cry10Aa to protect cotton from the boll weevil, thereby promising a dramatic reduction in insecticide use.

10. #TruthAboutCotton: The Secretariat informed participants in the Plenary Meeting that the #TruthAboutCotton campaign uses statistics, research and verifiable facts to counter misleading claims told about the cotton industry. The campaign aims to empower the global cotton value chain to support the hundreds of millions of people around the world who depend upon cotton for their livelihoods.

11. Cotton By-products: New uses for the by-products of cotton production, such as stalks and material remaining after ginning, are being developed in order to enhance the income of farmers. Products produced include 100% biodegradable packaging material as well as composites used in construction and other products.

12. World Café: The ICAC conducted a World Café conversation on organic cotton. Topics discussed were farm economics, ecology and environment, innovation and R&D, organic seed production, processing, diversification and policies. Yield improvement in organic cotton production is still an area where more research is needed. One suggestion was to have dedicated zones for organic cottonseed production and ginning to facilitate the production and marketing of organic cotton. Market intelligence for organic cotton should be strengthened. Some participants suggested that there is a need to develop policies for organic cotton production on national and regional levels.

13. Topic of 2019 Technical Seminar: The Committee decided to hold the 2019 Technical Seminar on the topic of 'Cotton Traceability Technologies'.

14. Strategic Plan: Following their recommendation at the last Plenary Meeting in Tashkent, Uzbekistan, to conduct a Strategic Review, the Committee was updated with the results of that review and presented with the proposed ICAC Strategic Plan 2019-2021. The Plan was formed as a result of 12 months consultation with stakeholders at different levels, and its seven core objectives form a strong starting point to ensure the organisation is fit for purpose for the future. Following a unanimous recommendation from the Standing Committee, the Strategic Plan was approved.

15. Future Plenary Meeting: The Committee has accepted an invitation from the government of Australia to host the 78th Plenary Meeting from 1 through 5 December 2019 in the city of Brisbane.

16. Appreciation to the Host Country: The Committee thanks the people, the Organising Committee and the government of Côte d'Ivoire for hosting the 77th Plenary Meeting. Delegates commented very favourably on the quality of the venue, the efficiency of the preparations, and the warmth of the traditional Ivorian welcome.