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Agricultural Outlook Forum  
U.S. Department of Agriculture

Presented: February 24-25, 2011

## Cotton's Social and Environmental Impacts: Myth and Reality

Allen A. Terhaar  
Cotton Council International

# *Cotton's Social and Environmental Impacts: Myth and Reality*

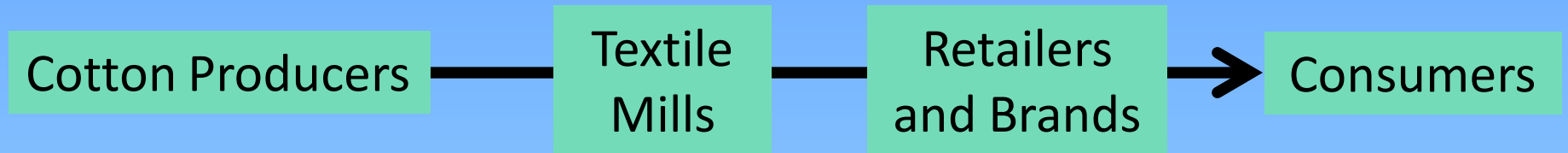


- **Keeping our product in front of manufacturers and retailers**
- **Convincing consumers with a focus on “natural”**
- **The importance of market share for cotton’s future**

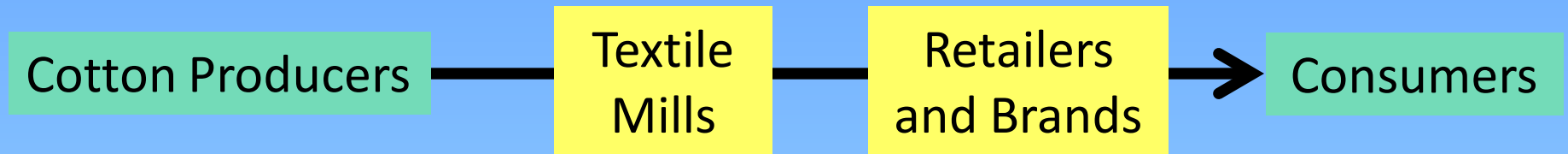




# A Simple View of the Cotton Supply Chain



# A Simple View of the Cotton Supply Chain



- *Natural variability in size and fiber quality among individual fibers*
- *Rapidly escalating cost relative to other fibers*
- *Cotton's environmental footprint in agriculture and manufacturing*

# Making the case for cotton: Trade Missions



# Bangladesh/Pakistan Team



# U.S. Cotton at Texworld





Choose Nature. Choose Cotton.

Being friendly to the environment starts with choosing the right fiber

Choosing cotton that minimizes the environmental impact of cotton production means there is now less land, less water, less soil erosion, and reduced pesticide application per unit of cotton production. Modern production practices annually already save over 1 billion liters of water and 1 million tons of greenhouse gas (CO2e) emissions. Growing cotton also produces more energy than it uses. The 100% cotton removed by cotton plants worldwide is being used to power over 7 million cars off the road. Customers consider cotton as safe. Results from the U.S. Environmental Protection Agency show that consumers who choose 100% cotton for the bedding fiber for the environment, save 6.47 on a 10 to 10 scale.

[cottonusa.org](http://cottonusa.org)



Bavaria



Bavaria

Bettwaren



# Being friendly to the environment starts with choosing the right fiber

**Modern technology minimizes the environmental impact of cotton production.**

U.S. farming with modern techniques means there is now less land, water and energy use, less soil erosion, and reduced pesticide application per unit output. Advanced production practices annually already save over 1 billion liters of tractor fuel and limits greenhouse gas (CO<sub>2</sub>) emissions. Growing cotton reduces GHGs and produces more energy than it uses – the amount of CO<sub>2</sub> removed by cotton plants worldwide is equivalent to taking over 7 million cars off the highways. Consumers consider cotton as safe. Results from our Global Lifestyle Monitor™ show that consumers consider cotton to be the safest fiber for the environment, rating it a positive 8.47 on a 0 to 10 scale.

[cottonusa.org](http://cottonusa.org)



*Naturally!*





SÜRDÜRÜLEBİLİR  
SUSTAINABLE



YENİLENER  
RENEWABLE



COTTON USA  
Promoting U.S. Cotton

www.cotton.org

Türkiye'deki COTTON USA Lisanslı Firmalara Teşekkür Ederiz  
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DO

BRODER BROS

BOOKS BROTHERS

CHICO'S





COTTON USA Sourcing Program  
[www.cottonusasourcing.com](http://www.cottonusasourcing.com)



## Hilos y Telas de Algodón de Estados Unidos:

Comprometidos con  
la Sostenibilidad y  
la Producción Responsable.  
Su Aliado para Proteger  
el Medio Ambiente.



Visite nuestro sitio web  
[www.cottonusasourcing.com](http://www.cottonusasourcing.com)

Si desea más información comuníquese al:  
+ 506.2288.2626 o al e-mail  
[floribeth.schuyler@cotton-cr.com](mailto:floribeth.schuyler@cotton-cr.com)





# Technology and Green Partnering



# Vision 21: LCI and LCA



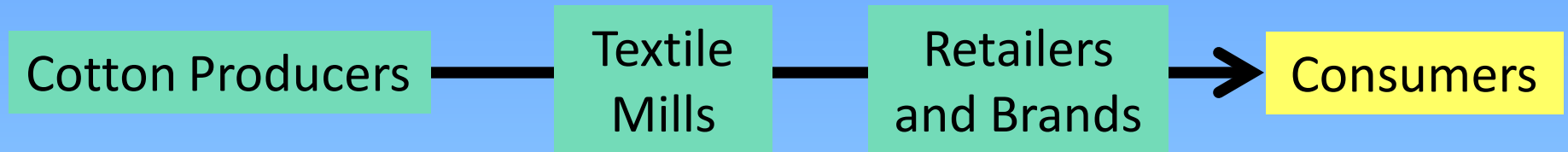
**Cotton Lifecycle Inventory**  
COTTON INCORPORATED



# What is a Life Cycle Inventory?

- A LCI contains the data such as energy use and carbon emissions for the raw materials and processes used to make a product.
- A useful tool to identify what process and/or material input has the biggest impact on a particular part of a product's life cycle. The area where the biggest impact occurs is a good starting point to examine what changes can be made to improve that process.

# A Simple View of the Cotton Supply Chain



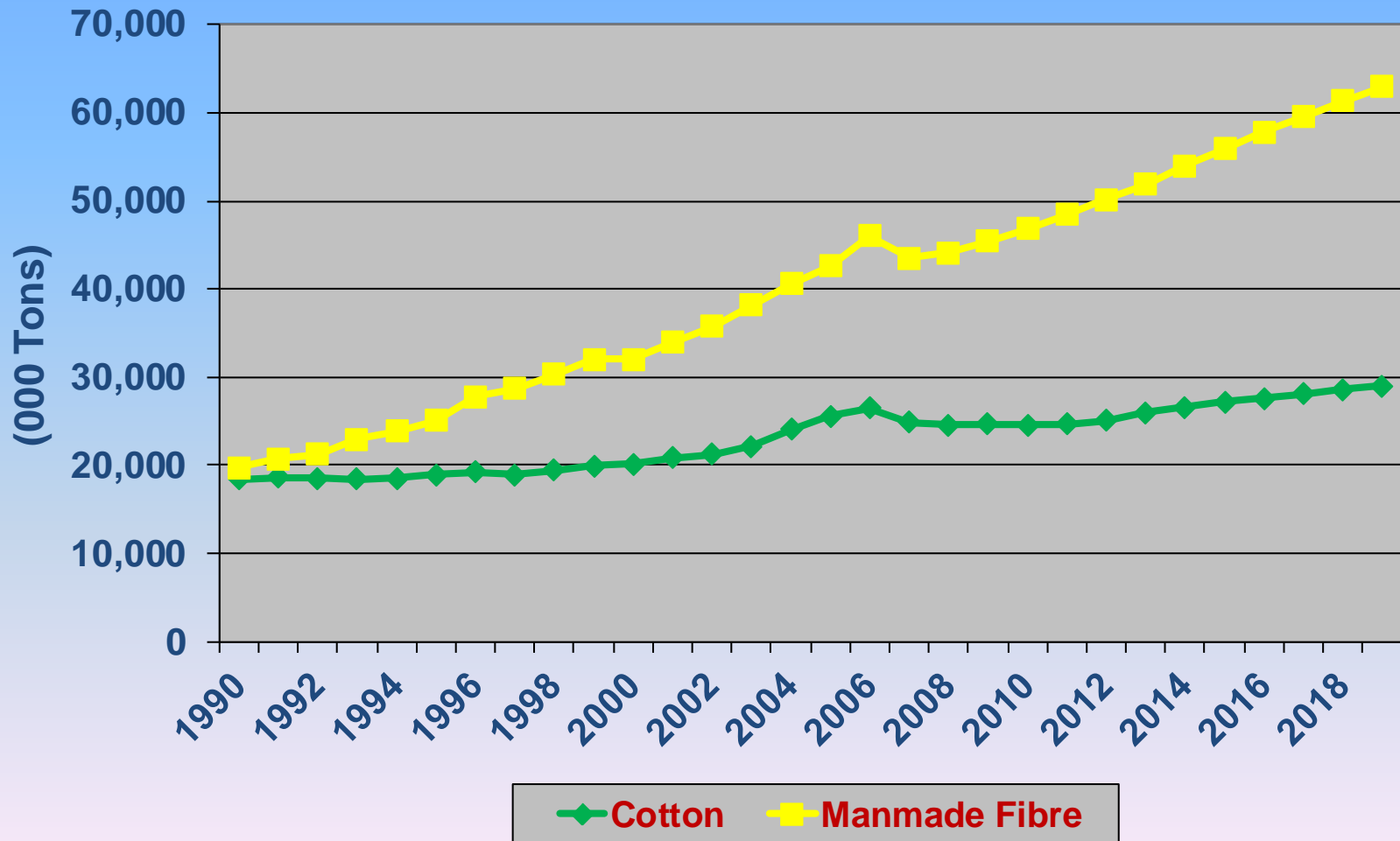
## Challenges to Consumer Promotion of Cotton

1. Keeping the emphasis on cotton versus synthetic
2. Getting the consumers' attention
3. Fostering the cotton promotion effort worldwide

# FCStone's Pete Nessler

- “Why is cotton at \$2.00? Because there are no substitutes.” **WRONG!**

# World Fiber Consumption Cotton vs. MMF

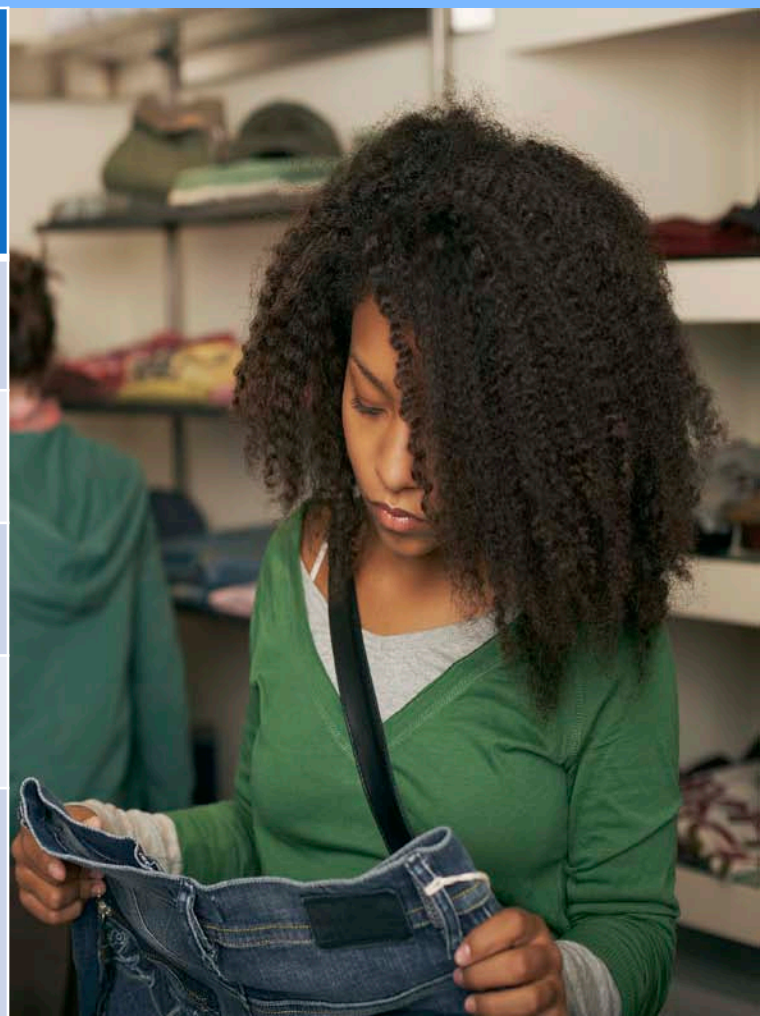




# Challenge: Getting the consumers' attention

*What's important when consumers buy clothes?*

Is this important?	US % saying "Yes"	UK % saying "Yes"
Price	86%	88%
Color	63%	91%
Style	54%	88%
Fabric Content	37%	50%
Environmentally-friendly	8%	20%





# Challenge: Getting the consumers' attention and being credible

*Percent of consumers who say the following industries are believable when making claims about the environment*

<b>Food</b>	<b>63%</b>
<b>Agriculture</b>	<b>56%</b>
<b>Appliances</b>	<b>57%</b>
<b>Infant and Baby Care</b>	<b>55%</b>
<b>Apparel</b>	<b>55%</b>
<b>Automobile</b>	<b>38%</b>
<b>Oil Companies</b>	<b>27%</b>



# Challenge: Getting the consumers' attention

Cotton is a natural fiber. Isn't that obvious?

***Not so fast...***

Photographs: Revista FUCSIA Colombia. Photographer: Pablo Ramirez. Designer: Amelía Toro © 2006



**SOFT, SENSUAL AND SUSTAINABLE.  
IT'S COTTON USA!**



**Feel the difference**  
[www.discovercottonusa.com](http://www.discovercottonusa.com)

For the ultimate sensation in cotton, the natural choice of many leading brands is COTTON USA, with its versatility and guaranteed quality. Look for the COTTON USA Mark as a reassurance of excellence. So, for an exceptional experience choose COTTON USA.

SOFT, SENSUAL AND  
SUSTAINABLE.

**IT'S COTTON USA!**

Model: Norma Nib. Photographer: Elen Isaa. Designer: Juñts Suárez. © 2008



# COTTON USA

Soft, sensual and natural

For the ultimate sensation in cotton, the natural choice of many leading brands is COTTON USA.  
To find out more, visit our website on [www.discovercottonusa.com](http://www.discovercottonusa.com)



# COTTON USA

Soft, sensual and natural

# ICAC and ITMF Language

- “Cotton is a natural fiber regardless of production methodology or seed technology.”
- The ICAC agrees that the fiber produced from cotton plants is a “natural fiber,” regardless of production methodology or seed technology

# Embrace Nature. Choose Cotton!



Promoting U.S. Cotton

Embrace Nature.  
Choose Cotton.



*Naturally!*



# Challenge: Keeping the emphasis on cotton versus synthetic

*The real choice is cotton versus synthetic fibers, not one type of cotton versus another cotton.*





**KIRKLAND**  
*Signature*

ITEM 25326

*Premium Unscented*  
**BABY WIPES**

ULTRA SOFT CLOTHS



94-000000700 79 14 24



- Natural Softness of Real Cotton
- With Vitamin E
- Hypoallergenic
- Alcohol-Free



**704 WIPES**

EIGHT - 88 CT. PACKAGES

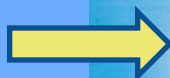
704 WIPES 7.1 in x 7.9 in  
(18 cm x 20 cm)



Tencel®

**KIRKLAND**  
*Signature*

ITEM 394485



All Natural Fiber\*

# Baby Wipes

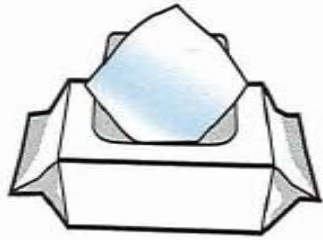
Unscented  
Ultra Soft Cloths

- ✓ Wipes Made From 100% Renewable Resources
- ✓ With Vitamin E
- ✓ Hypoallergenic & Alcohol Free

**900** 

WIPES NINE-100 COUNT PACKAGES  
7.1 in x 7.9 in (18 cm x 20 cm) wipes





**K**irkland Signature  
Baby Wipes are

made with Tencel<sup>®</sup>, a naturally soft,  
environmentally friendly fiber.

The fiber is made from wood pulp,  
and is a 100% renewable resource.

These wipes are ideal for your  
baby's delicate skin as they are  
hypoallergenic, alcohol- and  
chlorine-free, and contain aloe



All Natural Fiber\*

Baby

ITEM 394485



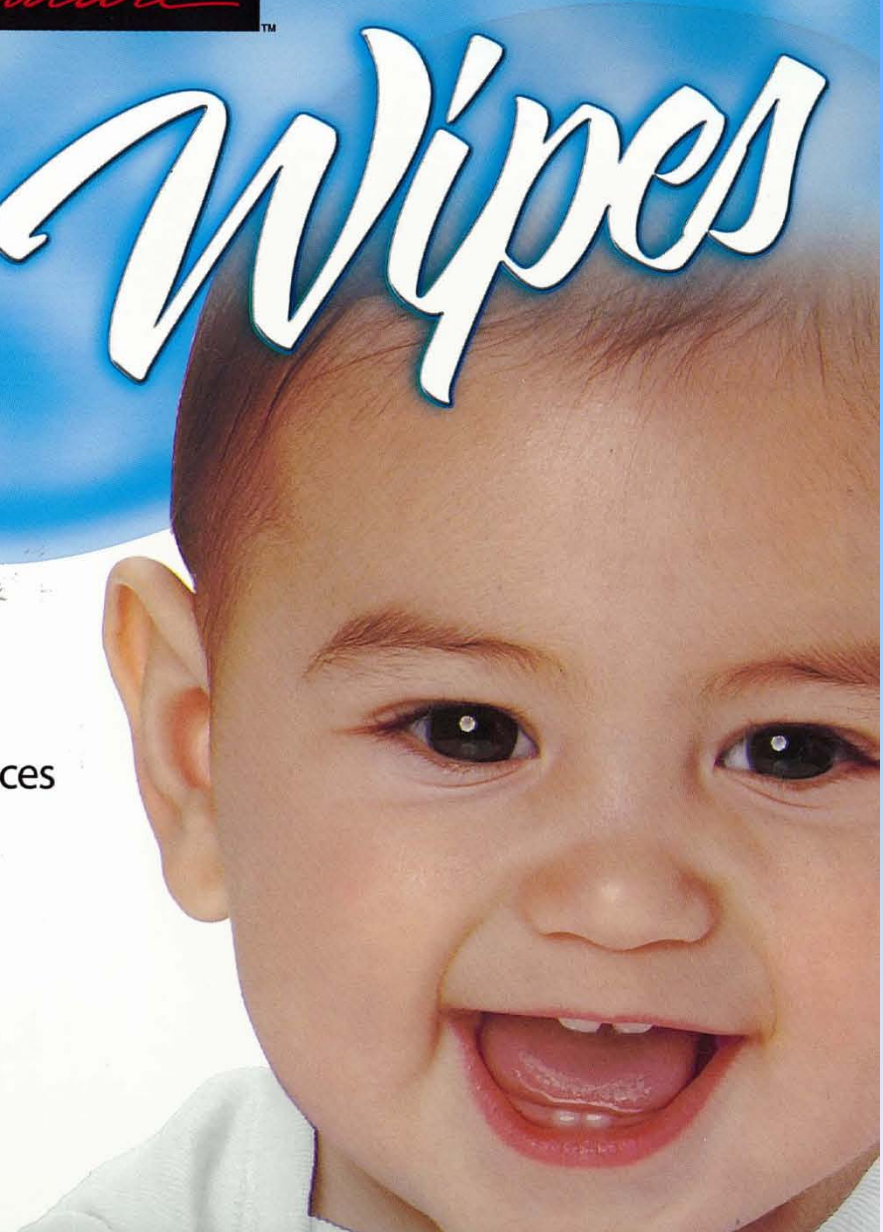
# Baby Wipes

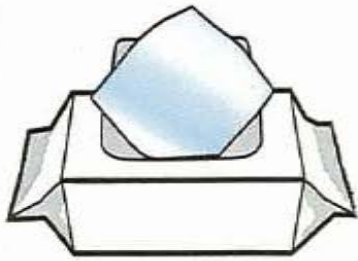
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WIPES NINE -100 COUNT PACKAGES  
7.1 in x 7.9 in (18 cm x 20 cm) wipes





Kirkland Signature  
Baby Wipes are made

with 70% Tencel<sup>®</sup> Fiber, a naturally  
soft, environmentally friendly fiber.

The fiber is made from wood pulp,  
and is a 100% renewable resource.

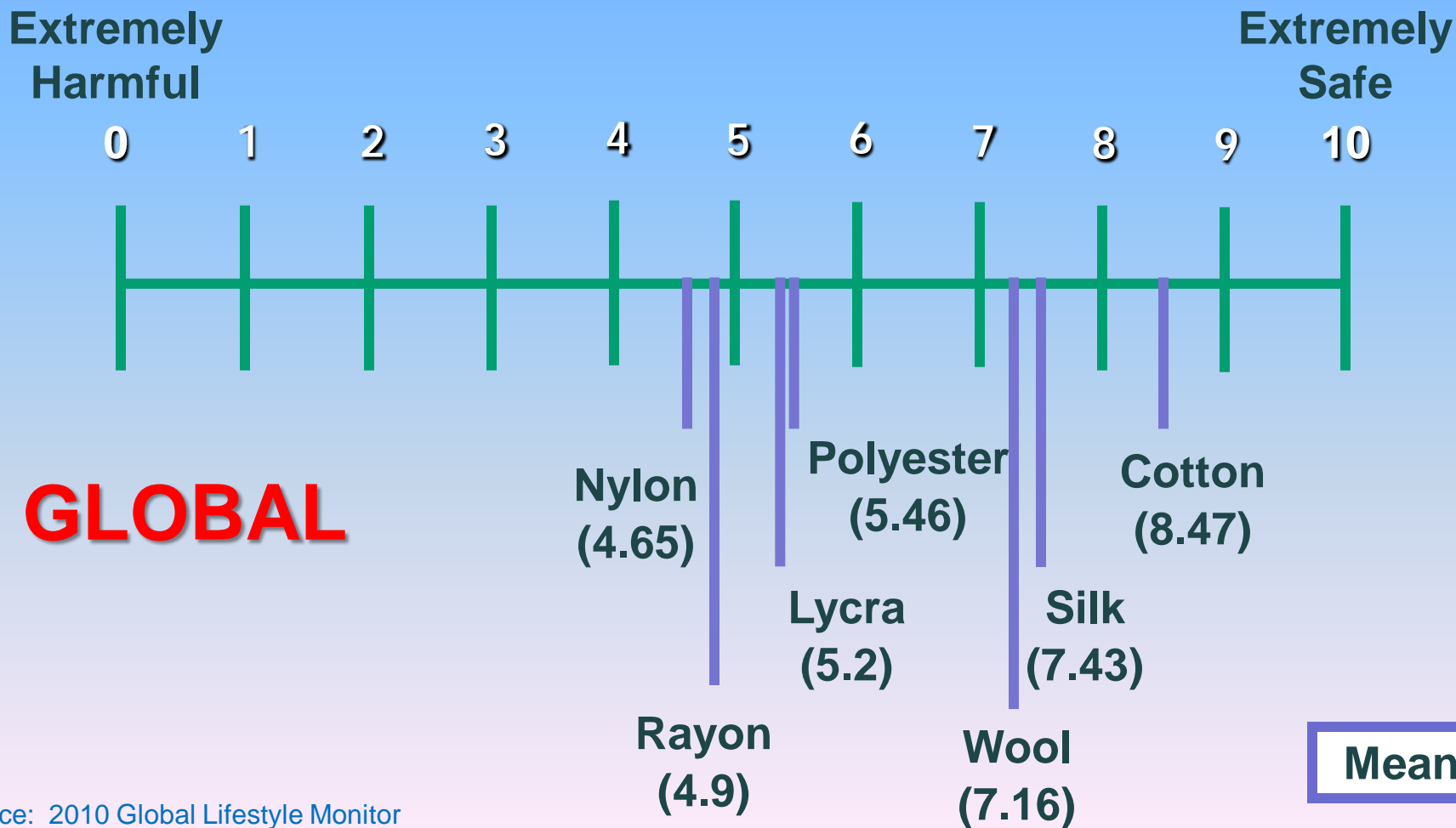
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Made with  
**Tencel<sup>®</sup>**  
New Age Fiber

**Baby**

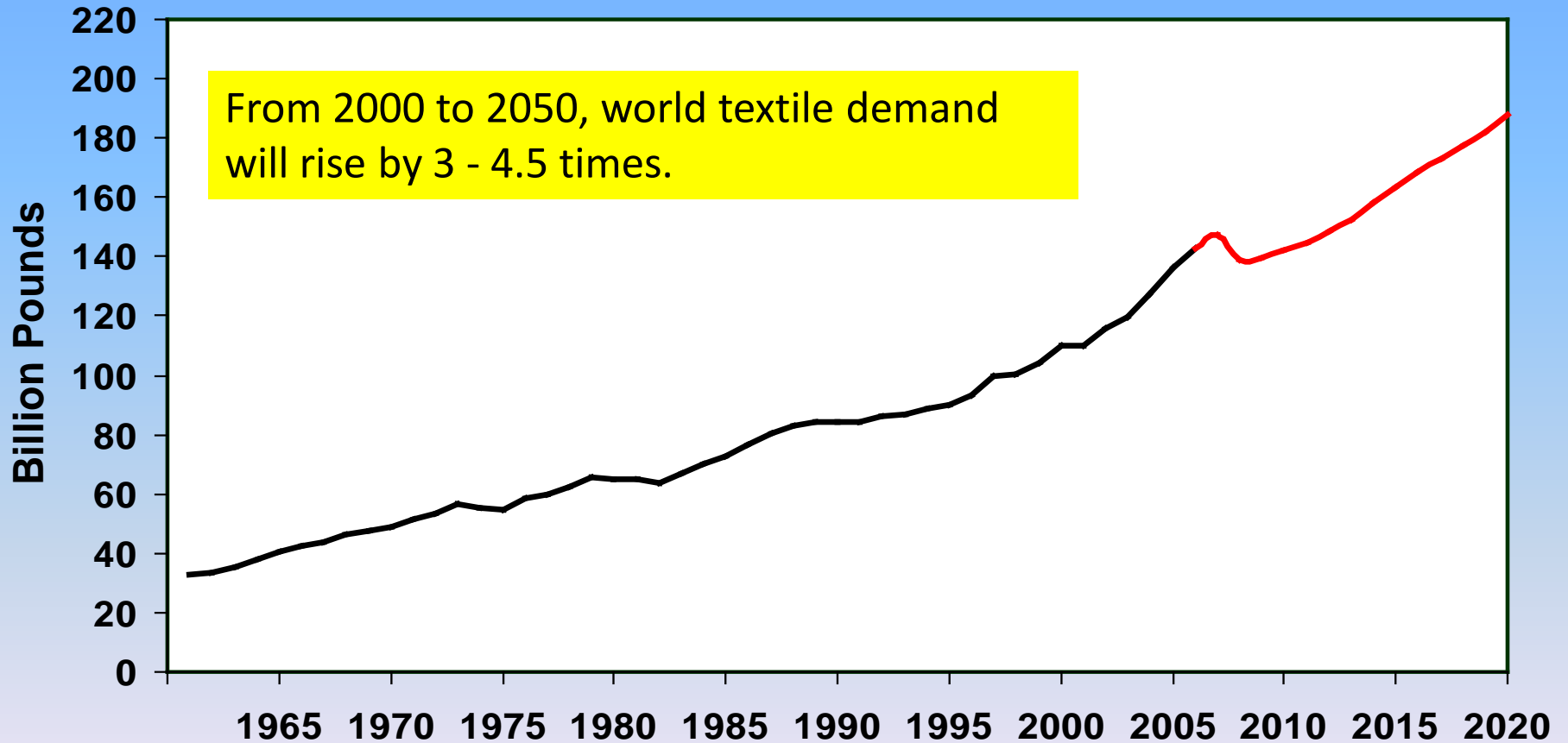
# Using a 0-10 Scale, where 0 means “Extremely Harmful” and 10 means “Extremely Safe”, in your opinion how harmful or safe are these fibers to the environment?



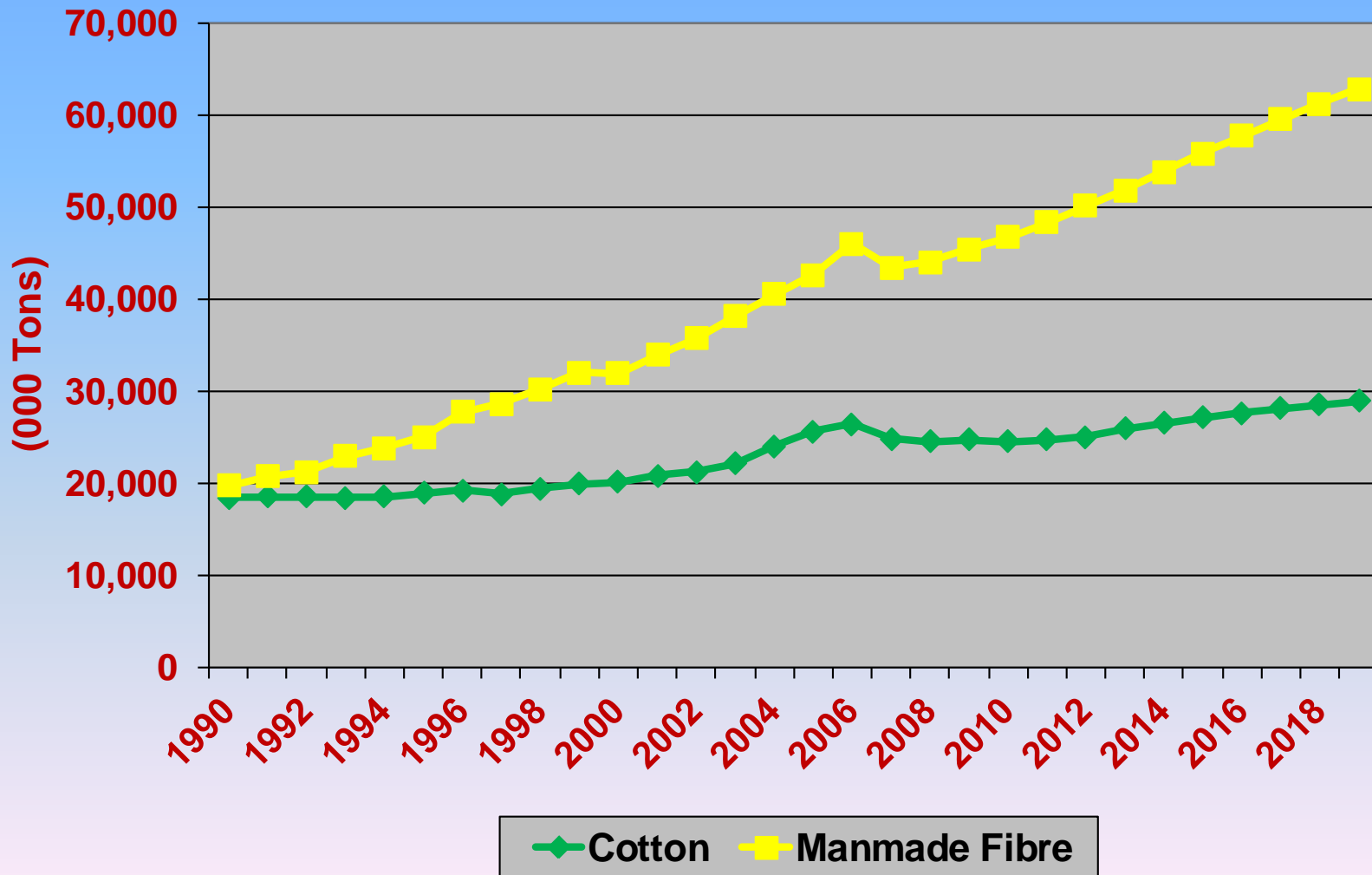
# Today's Strategies & Tomorrow's Opportunities



# Global Demand for Fibers



# World Fiber Consumption Cotton vs. MMF



# ASIA COTTON DAYS

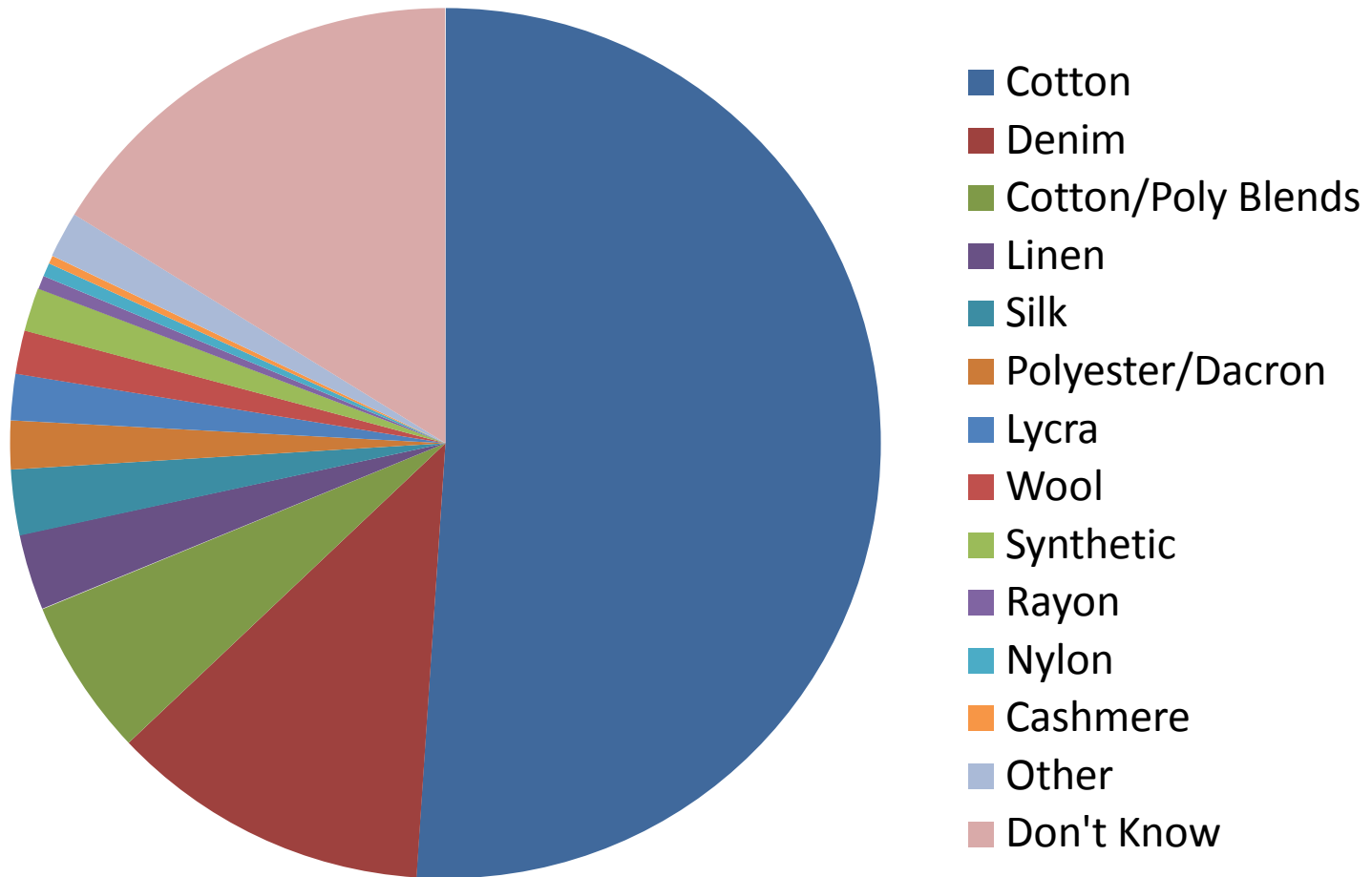




# 2010 Cotton Day Taiwan

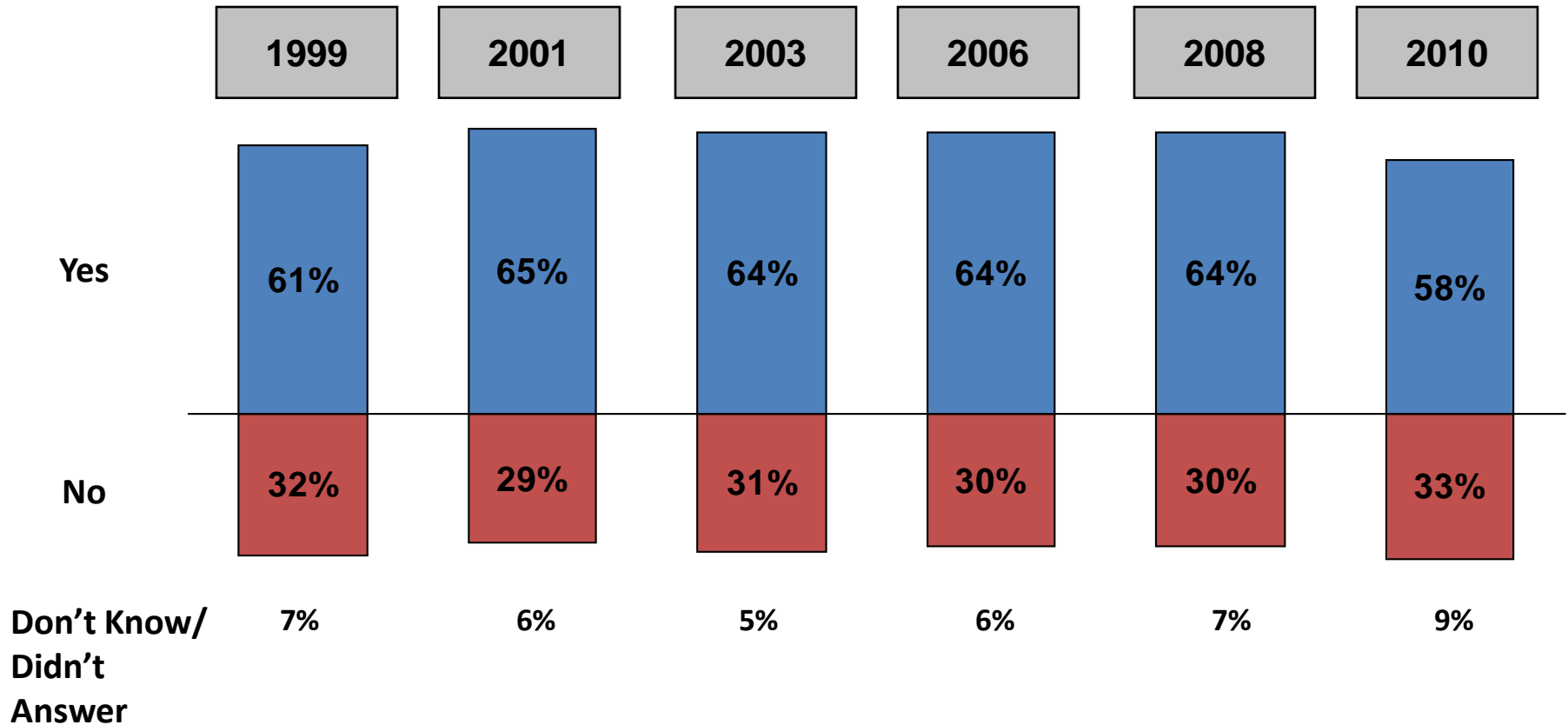
# Best Fiber for Today's Fashions

Over half of global consumers say cotton is the best fiber for today's fashions



# Willing to Pay More for Natural Fibers

Majority of global consumers are willing to pay more for clothing made from natural fibers



# Vision 21: China & India cotton consumption research



- Consumer Survey
- Retail Audit
- End-Use Cotton Consumption Forecast Model

# Challenge: Fostering the cotton promotion effort worldwide

- The International Forum for Cotton Promotion
- Generic promotion efforts in China, India, and Brazil



# Global Cotton Promotion

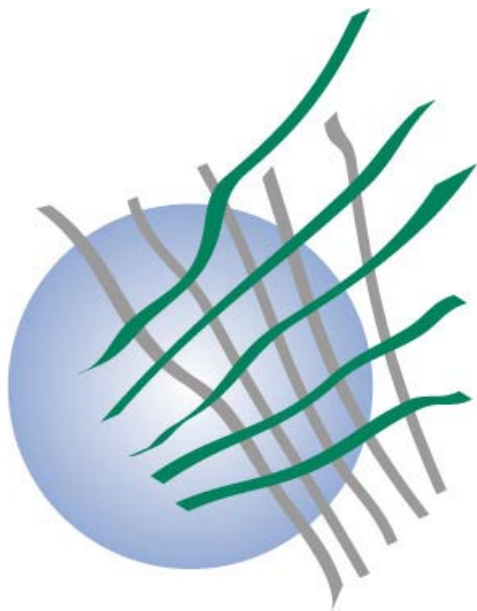


中国棉花  
COTTON CHINA



# Discover Natural Fibers

- Cotton is the largest natural fiber in the global fiber, textile and apparel economy, representing roughly 80 percent of all natural fibers consumed.
- Cotton represents hundreds of billions of dollars of economic activity and employs hundreds of millions of people from field to fabric.

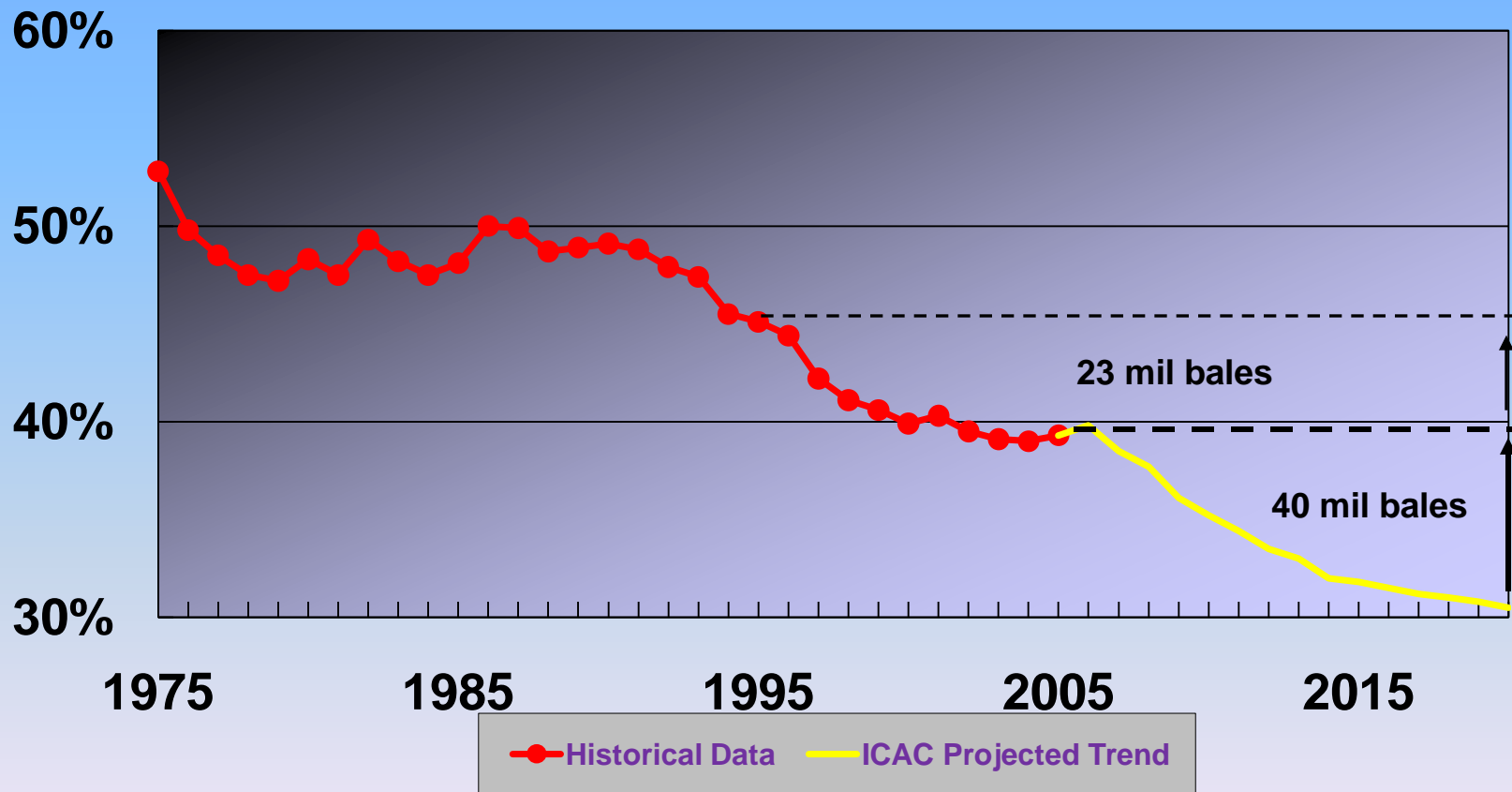


Discover  
Natural  
Fibres  
Initiative



# Cotton's Share of Global Fiber Consumption

(Sources: ICAC and CCI)





*Naturally!*