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Cotton's Social and Environmental Impacts: Myth and Reality

Allen A. Terhaar
Cotton Council International

Cotton's Social and Environmental Impacts: Myth and Reality

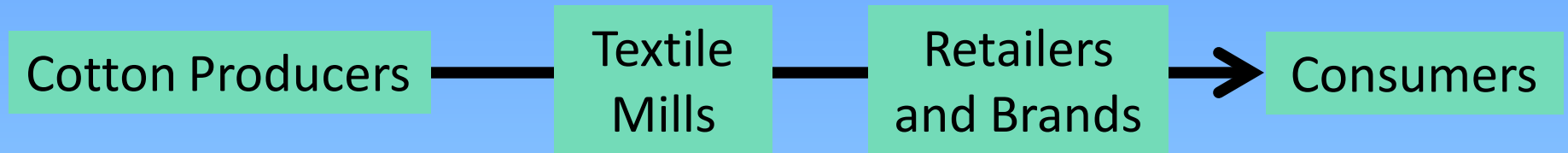


- **Keeping our product in front of manufacturers and retailers**
- **Convincing consumers with a focus on “natural”**
- **The importance of market share for cotton’s future**



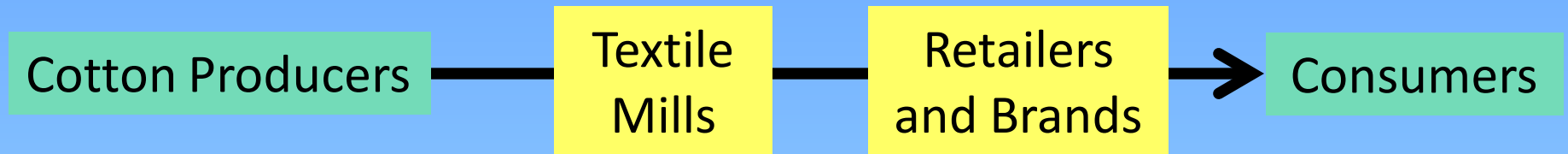


A Simple View of the Cotton Supply Chain





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



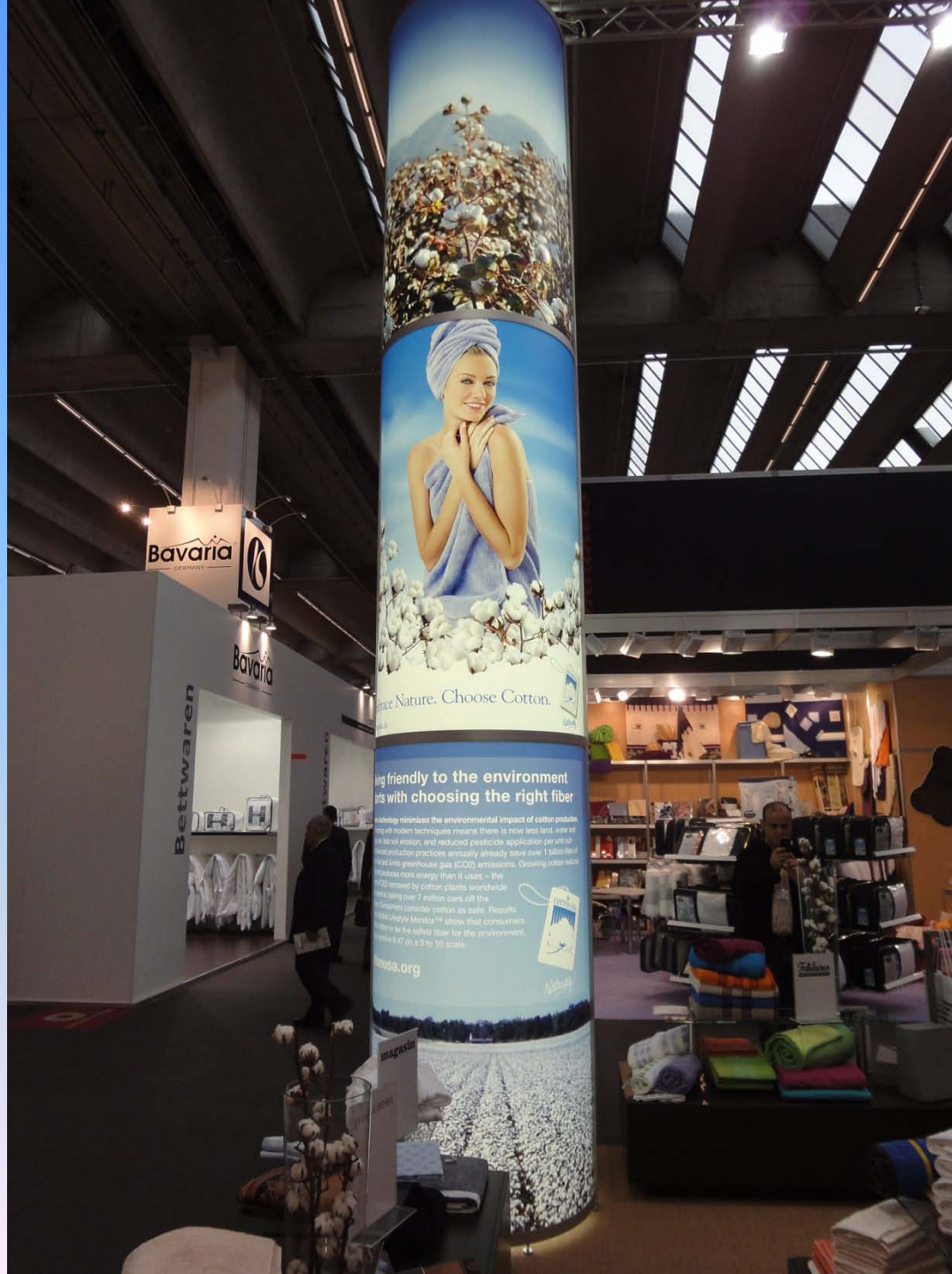
Bangladesh/Pakistan Team





U.S. Cotton at Texworld





Bavaria

Bavaria

Betwaren

Choose Nature. Choose Cotton.

Being friendly to the environment
starts with choosing the right fiber

Choosing cotton minimizes the environmental impact of cotton products. Compared to modern techniques, there is now less land, less water, less soil erosion, and reduced pesticide application per unit of cotton production. Cotton production practices annually already save over 1 billion liters of water and 100,000 tons of greenhouse gas (CO₂) emissions. Growing cotton also produces more energy than it uses. — The 100% cotton removed by cotton plants worldwide is being used by over 7 million cars off the road. Consumers consider cotton as safe. Results of the "Safe Choice" campaign show that consumers are more likely to buy the safest fiber for the environment, cotton, 8.47 on a 0 to 10 scale.

cottonusa.org

magasin

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 (CO₂) emissions. Growing cotton reduces GHGs and produces more energy than it uses – the amount of CO₂ 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



Naturally!



BRODER BROS

BOOKS BROTHERS

CHICO'S





COTTON USA Sourcing Program
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

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





Technology and Green Partnering



Vision 21: LCI and LCA

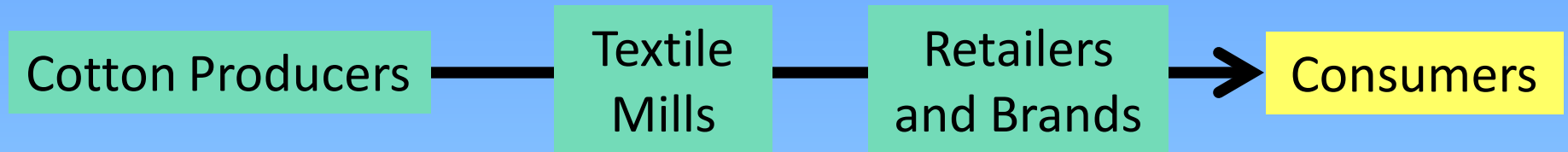


What is a Life Cycle Inventory?

- 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

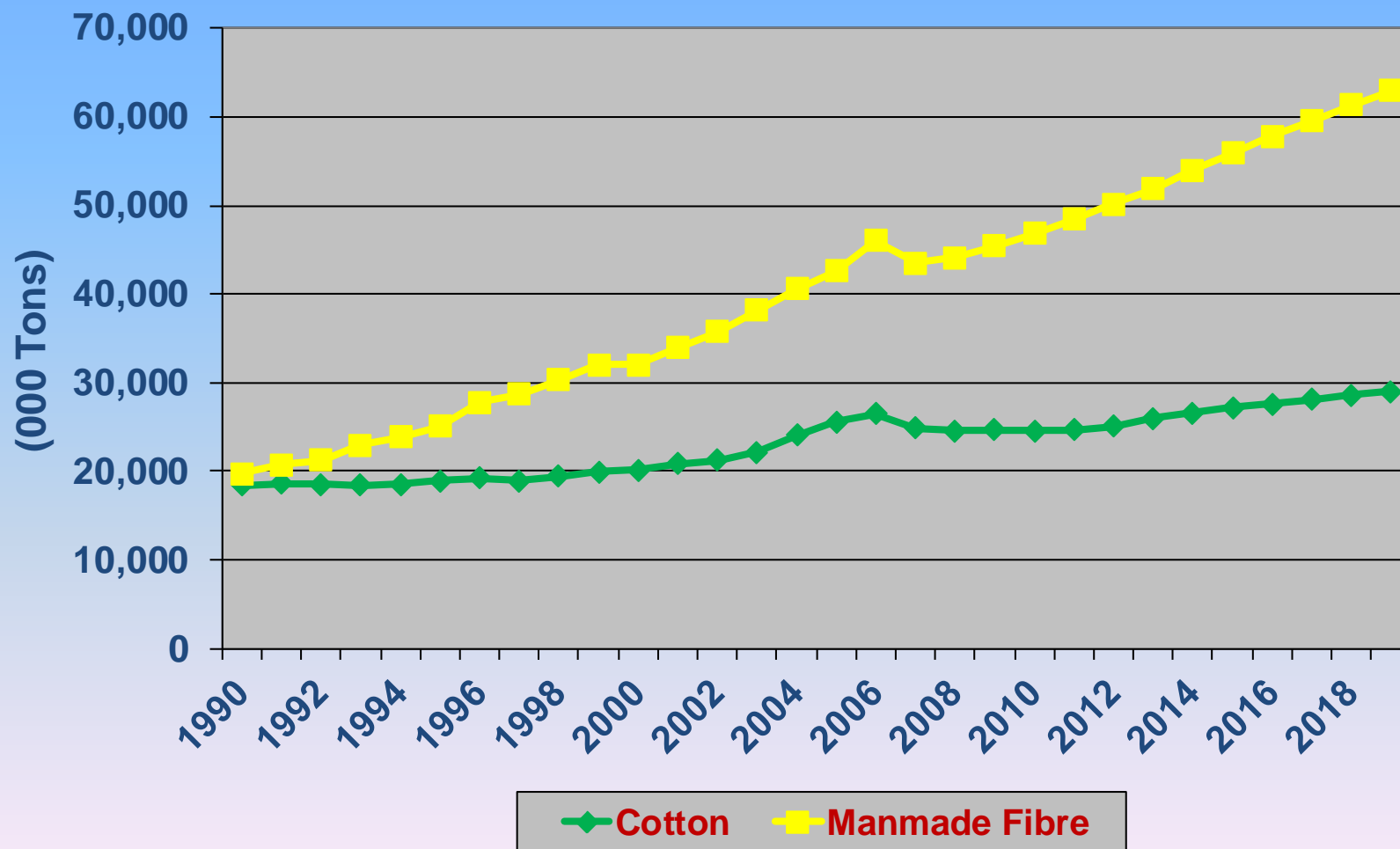
FCStone's Pete Nessler

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



World Fiber Consumption

Cotton vs. MMF

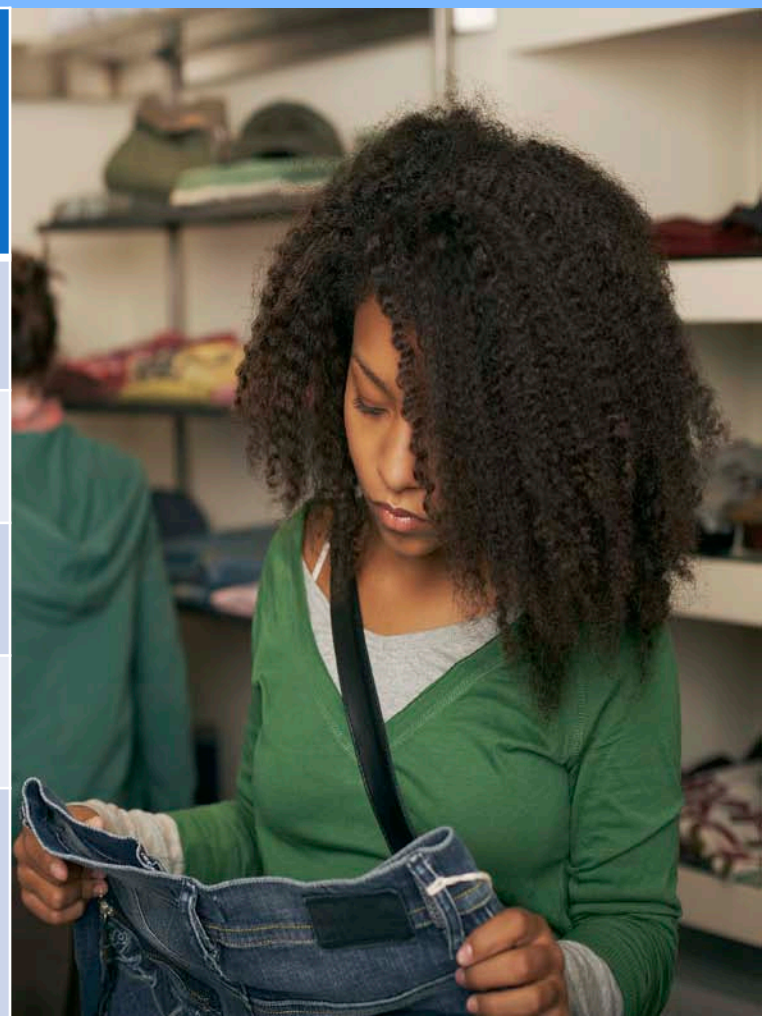




Challenge: Getting the consumers' attention

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

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



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: Anella Toro © 2006



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



Feel the difference
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 Nive. Photographer: Ellen Isaacs. Designer: Julia's Suarez. © 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



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 253204

Premium Unscented
BABY WIPES

ULTRA SOFT CLOTHS



SW700000000 79 14 24



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



704 WIPES

EIGHT - 88 CT. PACKAGES

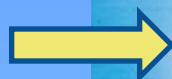
704 WIPES 7.1 in x 7.9 in
(18 cm x 20 cm)



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

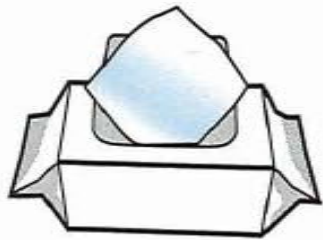
900



WIPES

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





Kirkland Signature
Baby Wipes are

made with Tencel[®], 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

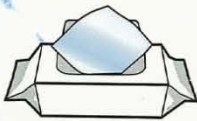


Baby Wipes

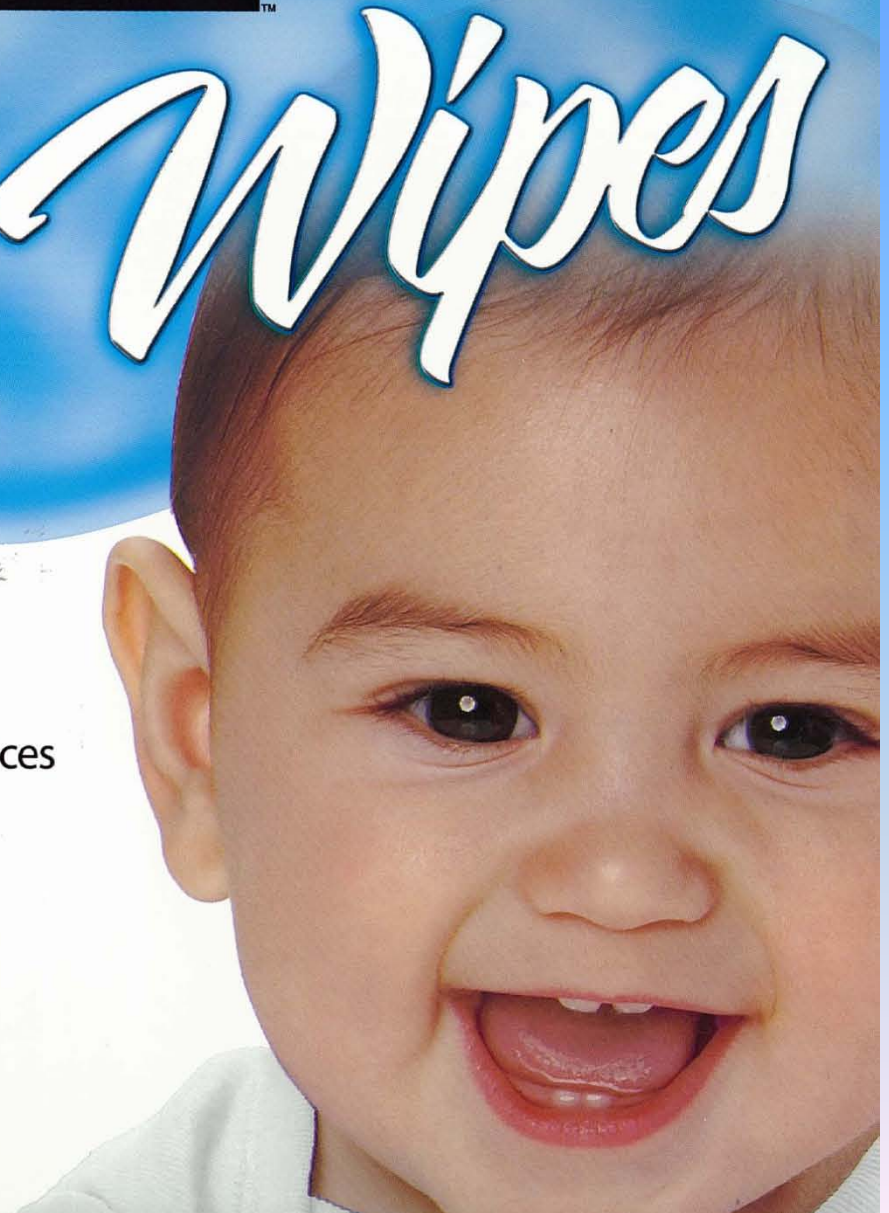
Unscented
Ultra Soft Cloths

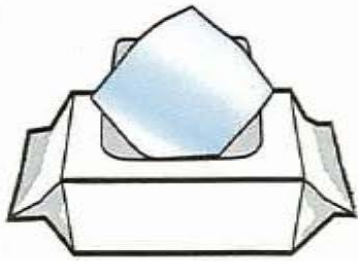
- ✓ Wipes Made From 100% Renewable Resources
- ✓ With Vitamin E
- ✓ Hypoallergenic & Alcohol Free

900



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





Kirkland Signature
Baby Wipes are made

with 70% Tencel[®] Fiber, 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



Made with

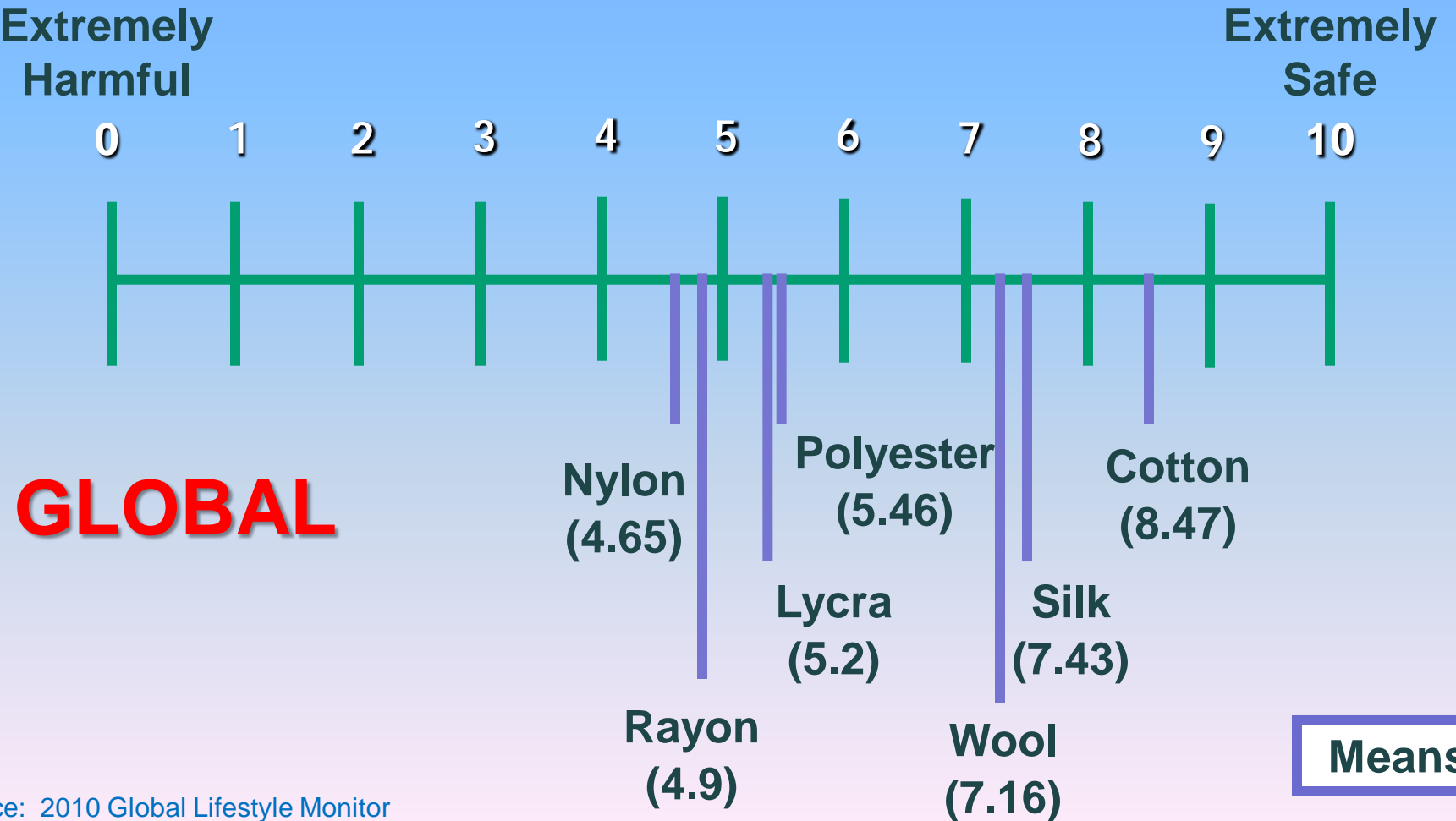
Tencel[®]

New Age Fiber

Baby



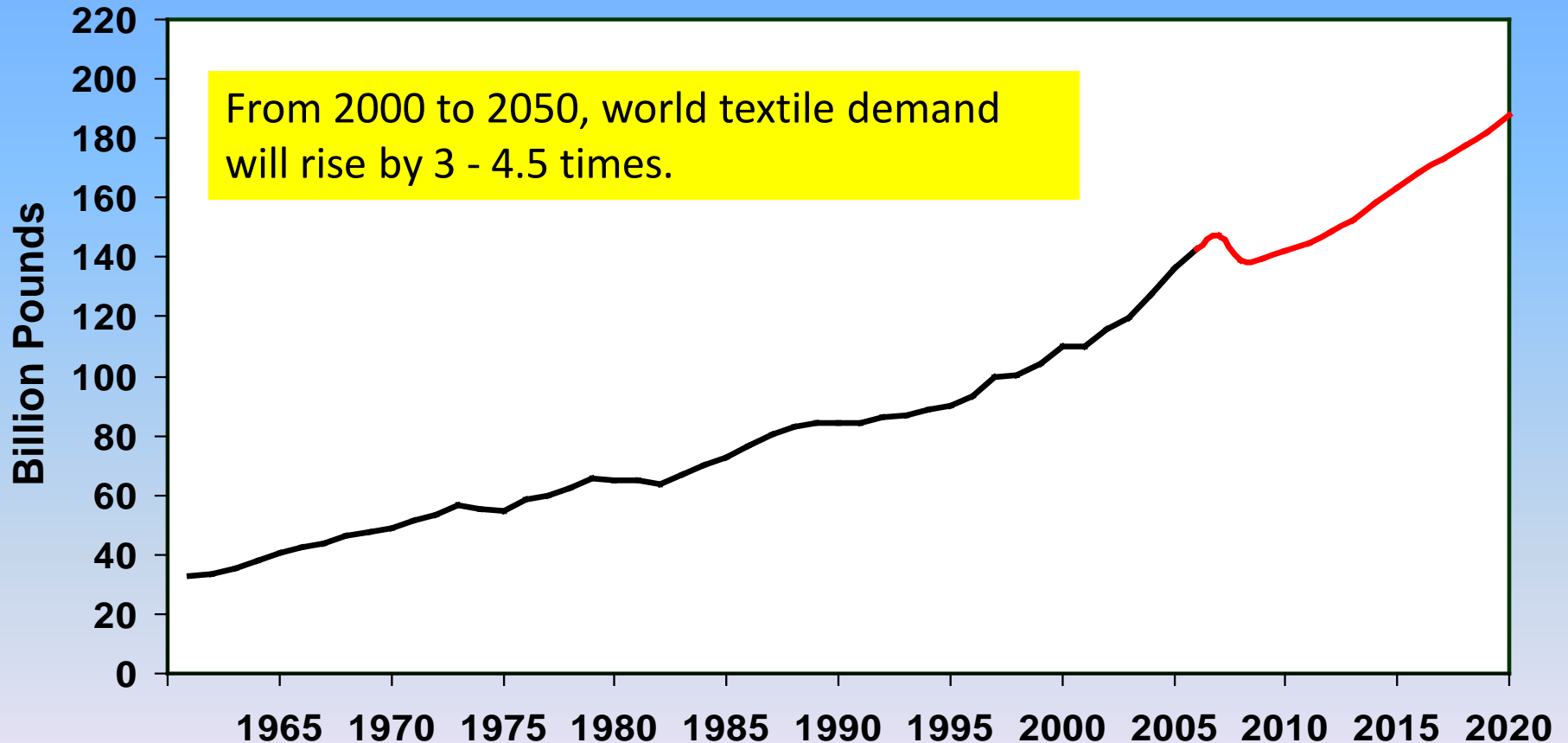
Using a 0-10 Scale, where 0 means “Extremely Harmful” and 10 means “Extremely Safe”, in your opinion how harmful or safe are these fibers to the environment?



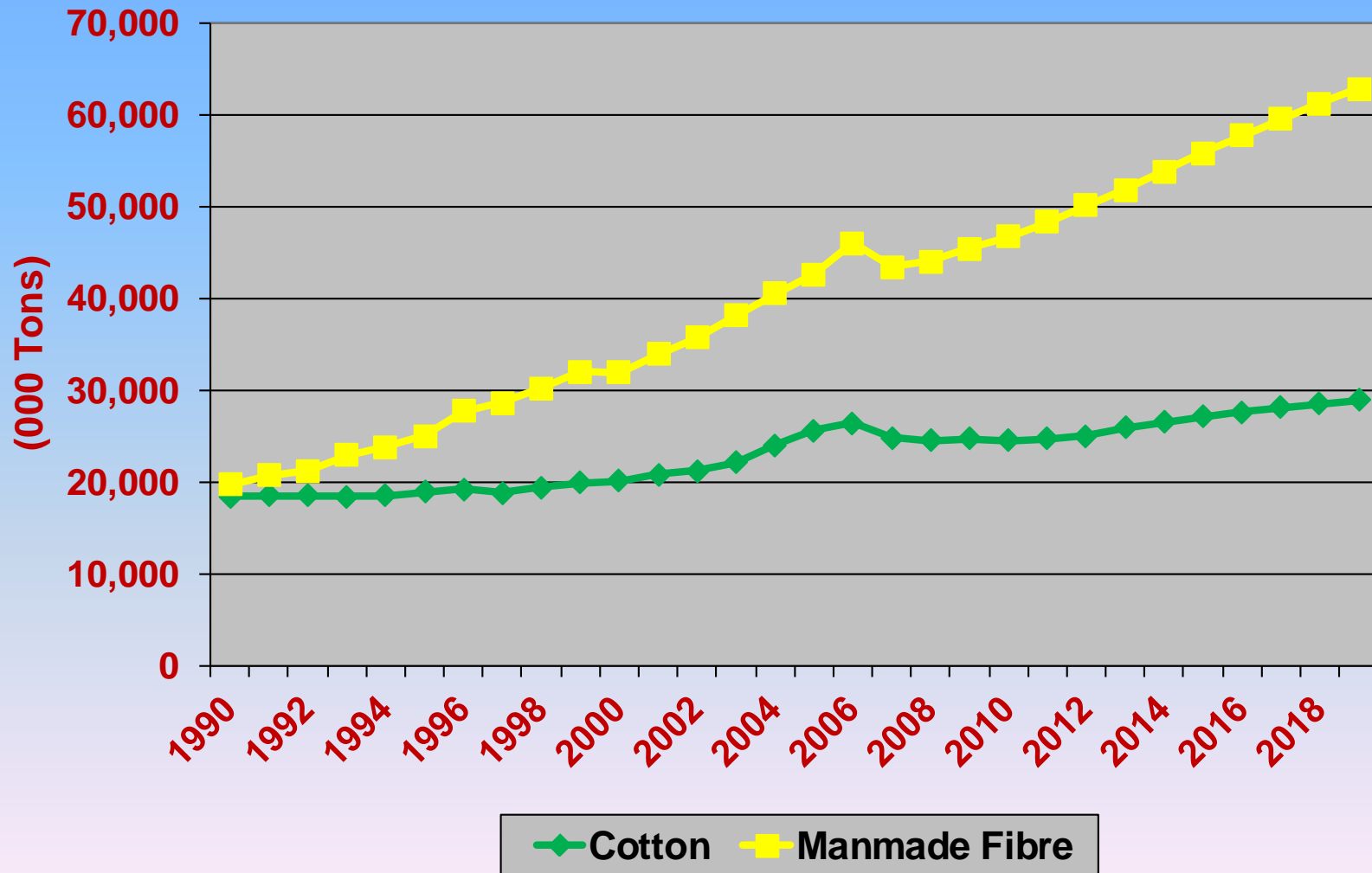
Today's Strategies & Tomorrow's Opportunities



Global Demand for Fibers



World Fiber Consumption Cotton vs. MMF



Source: PCI Fibres - World Synthetic Fibres Supply/Demand Report 2009

ASIA COTTON DAYS

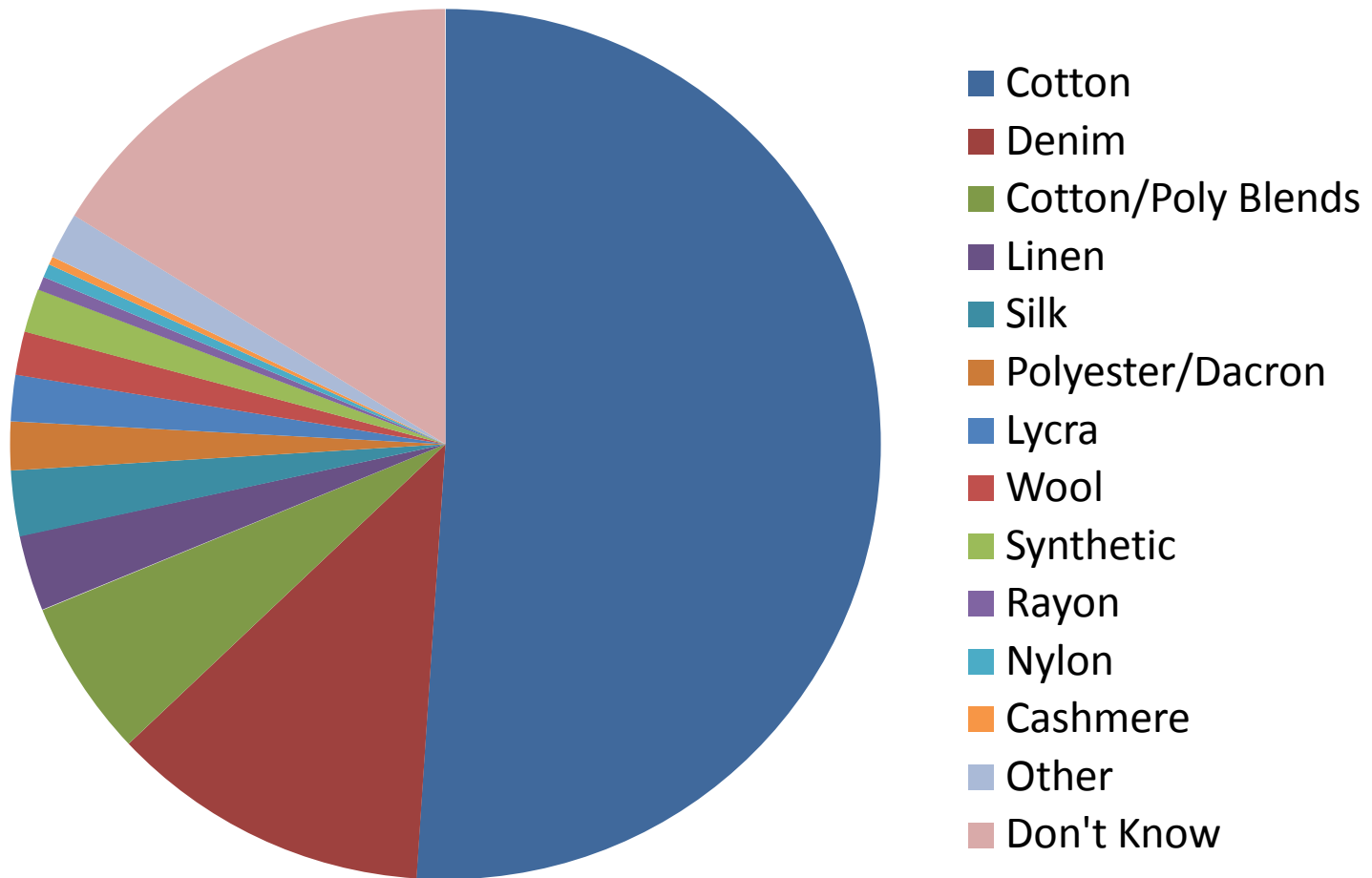




2010 Cotton Day Taiwan

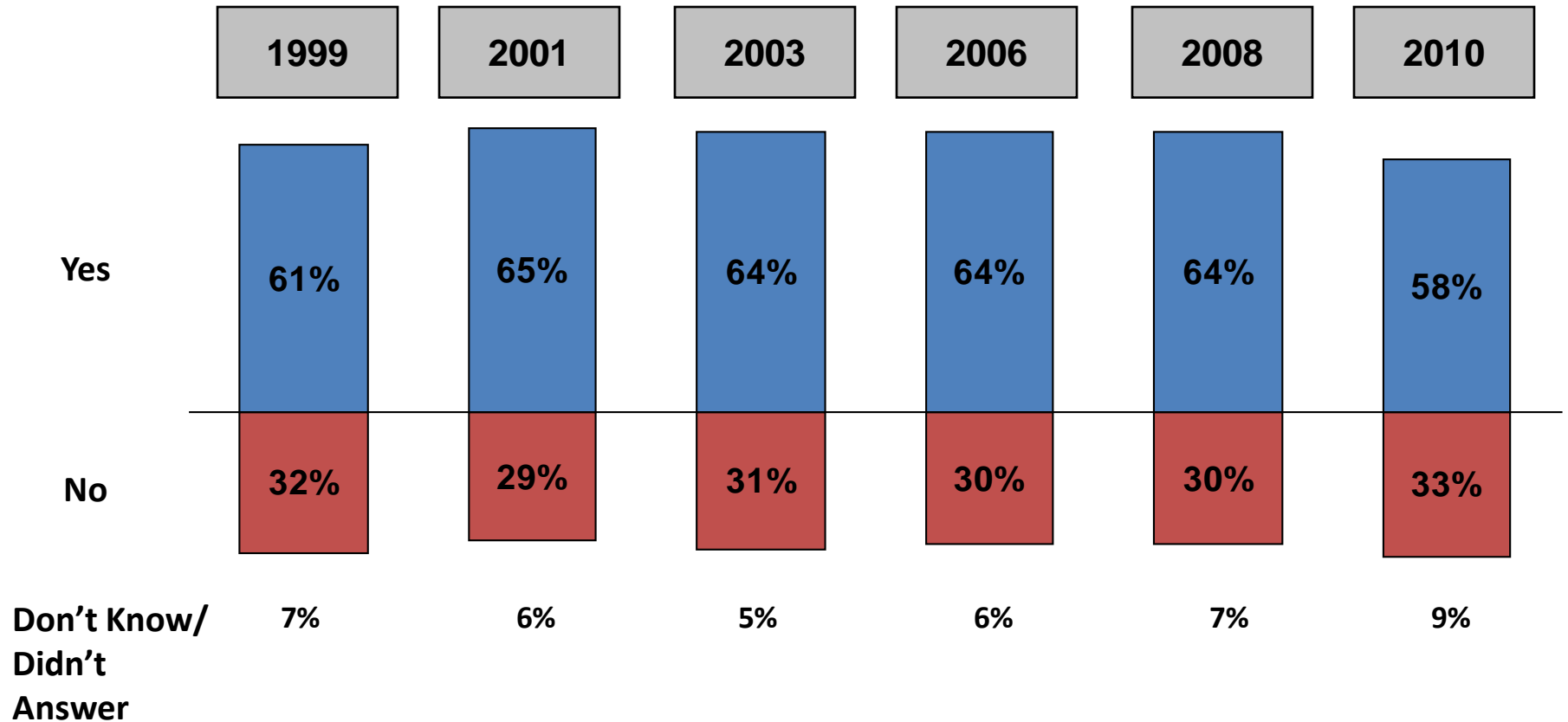
Best Fiber for Today's Fashions

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

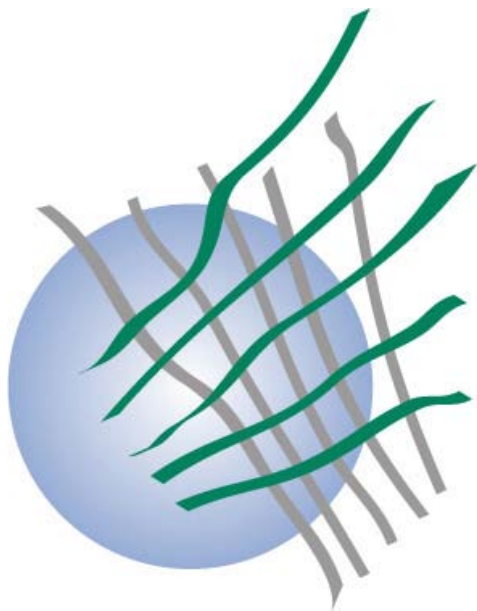


中国棉花
COTTON CHINA



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)

