

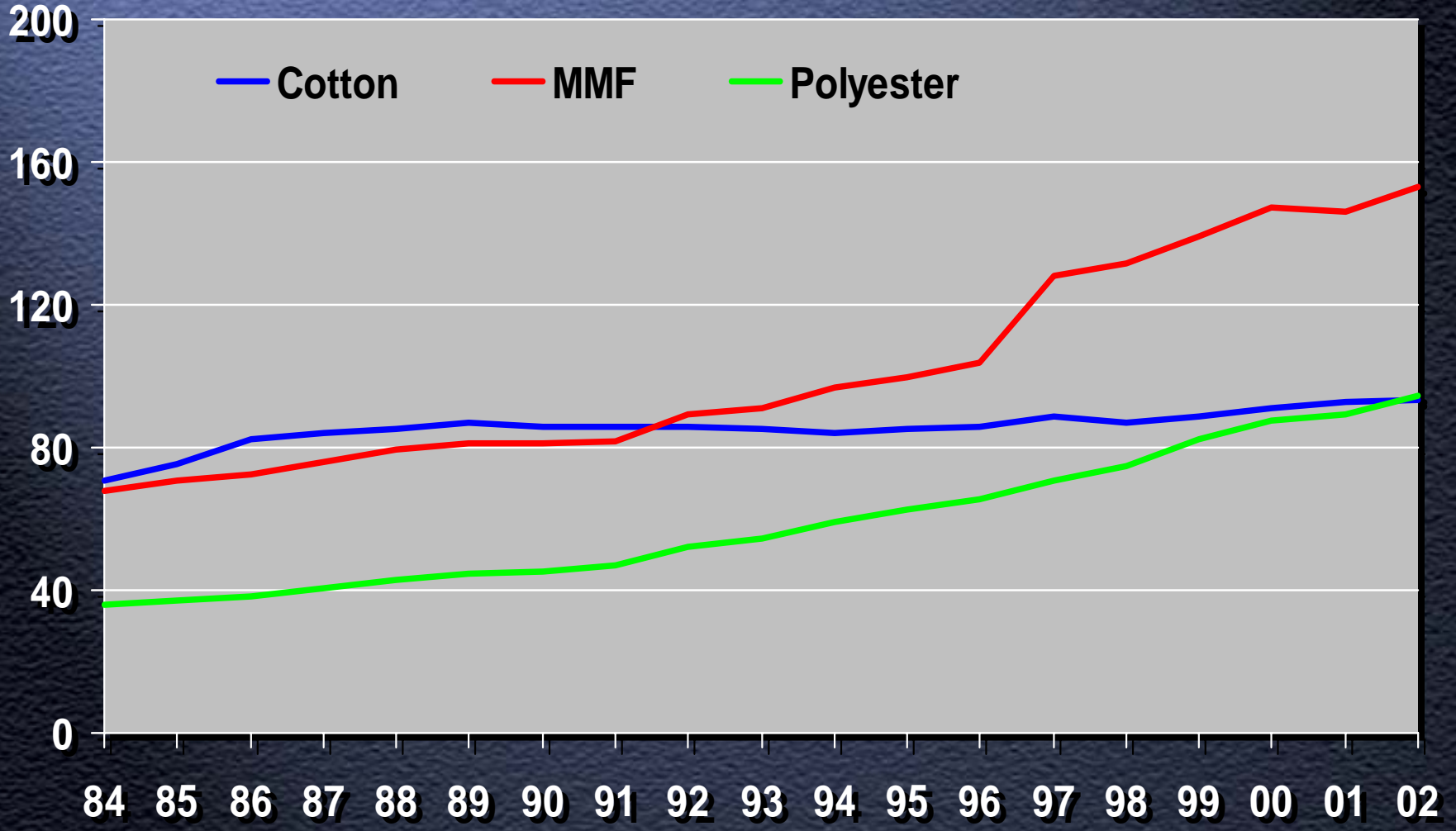


Rethinking Cotton Promotion

**Allen A. Terhaar, Executive Director
Cotton Council International
USDA Agricultural Outlook Forum
February 21, 2003**

Global Fiber Demand at Retail Level

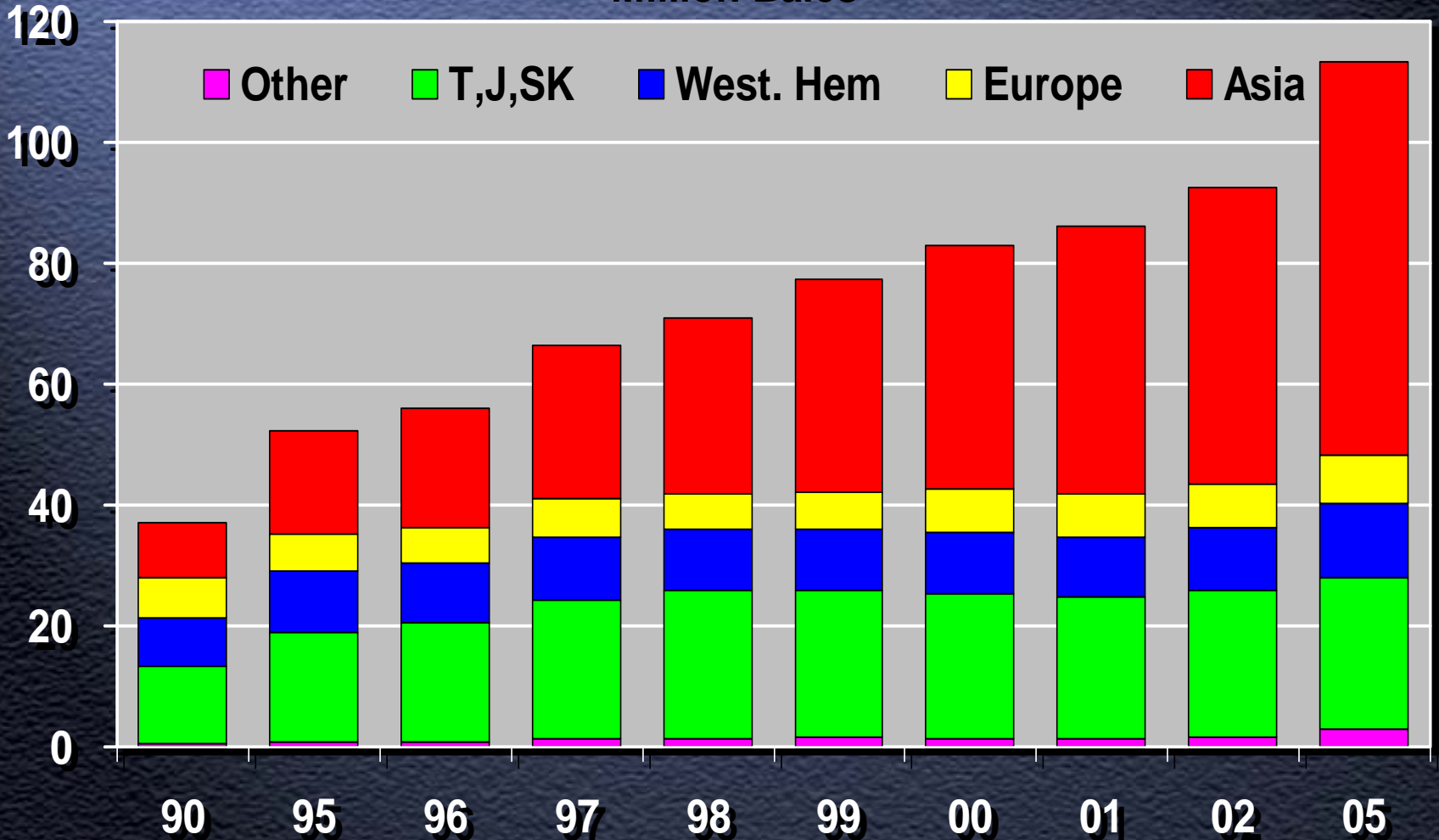
Million Bales



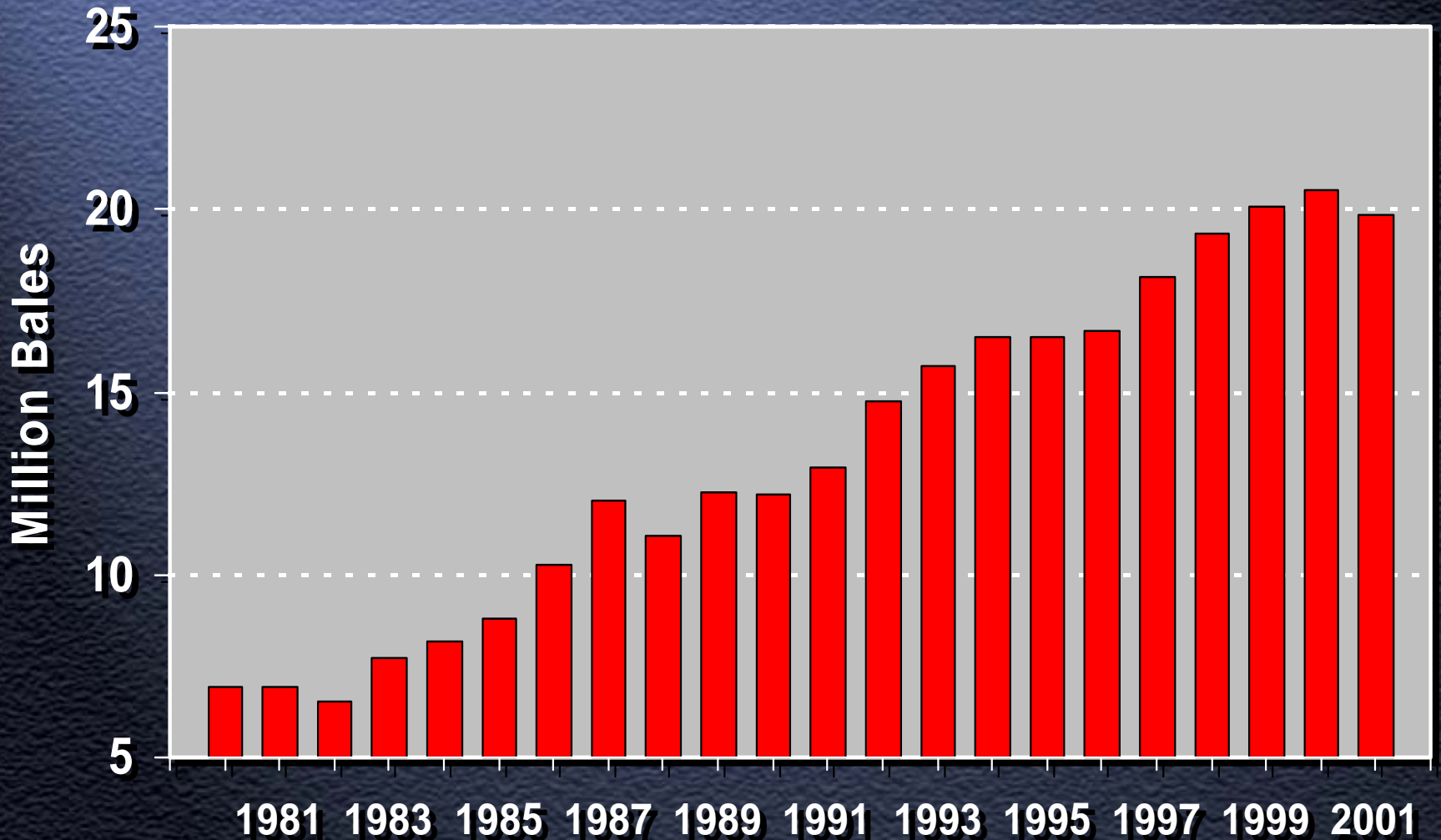
Source: NCC, Feb. 2003

Textile Polyester Production

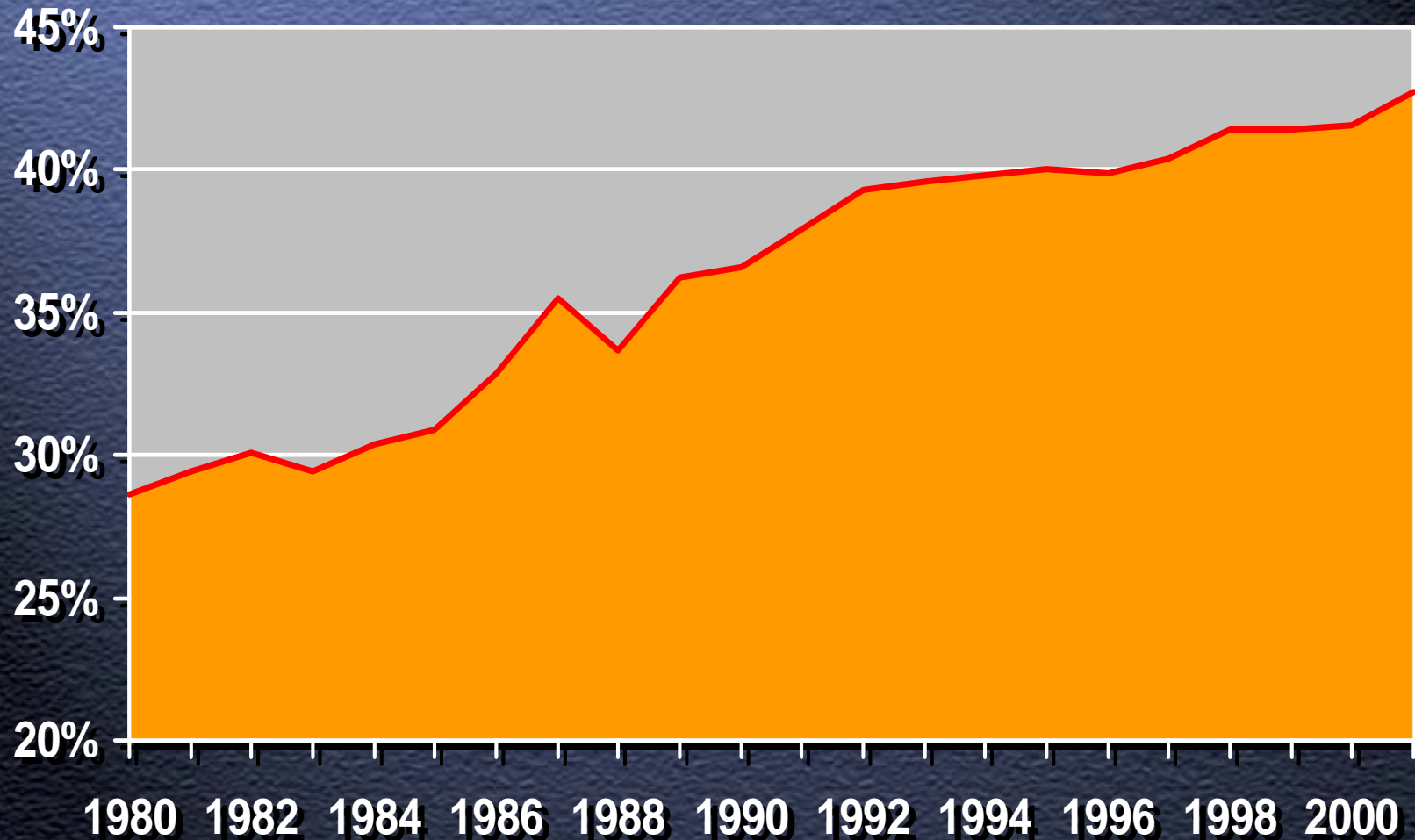
Million Bales



Consumer Demand for Cotton in U.S. Market



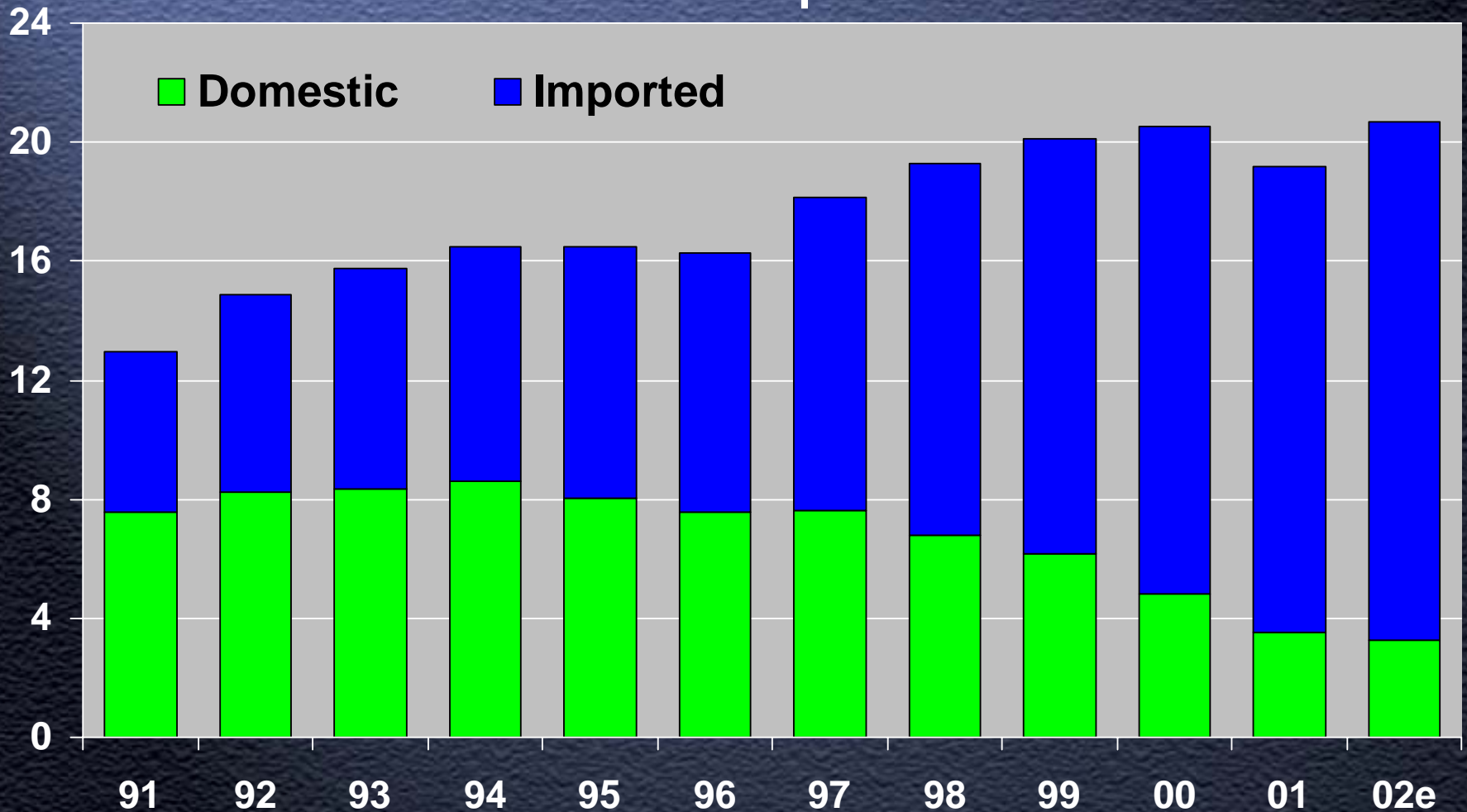
Cotton Share of Total Fiber Use in the United States*



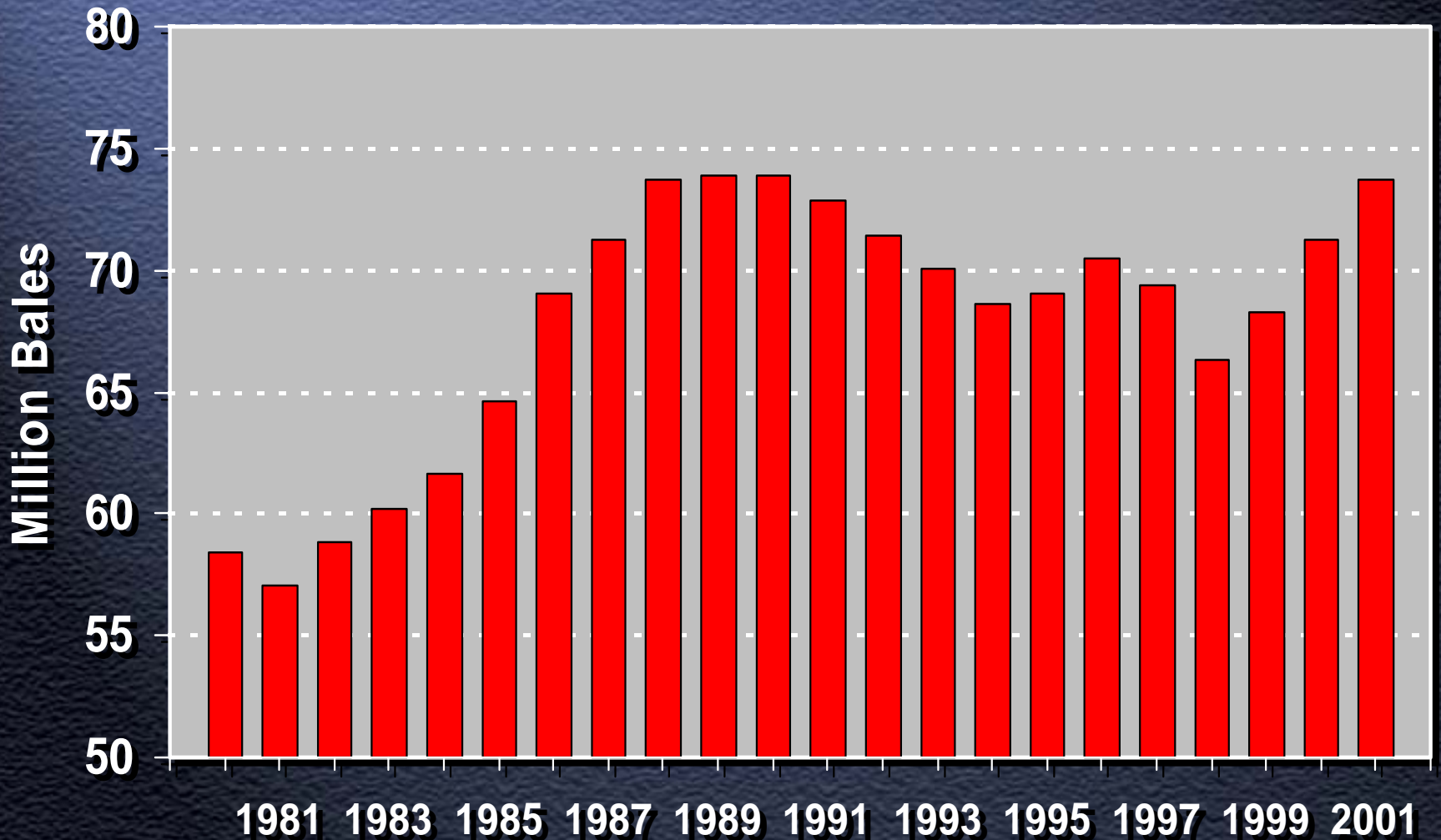
**Includes all fiber usage such as carpet and industrial markets. Cotton's share of retail apparel and home fabrics was approximately 60% in 2001.*

Components of Retail Cotton Consumption

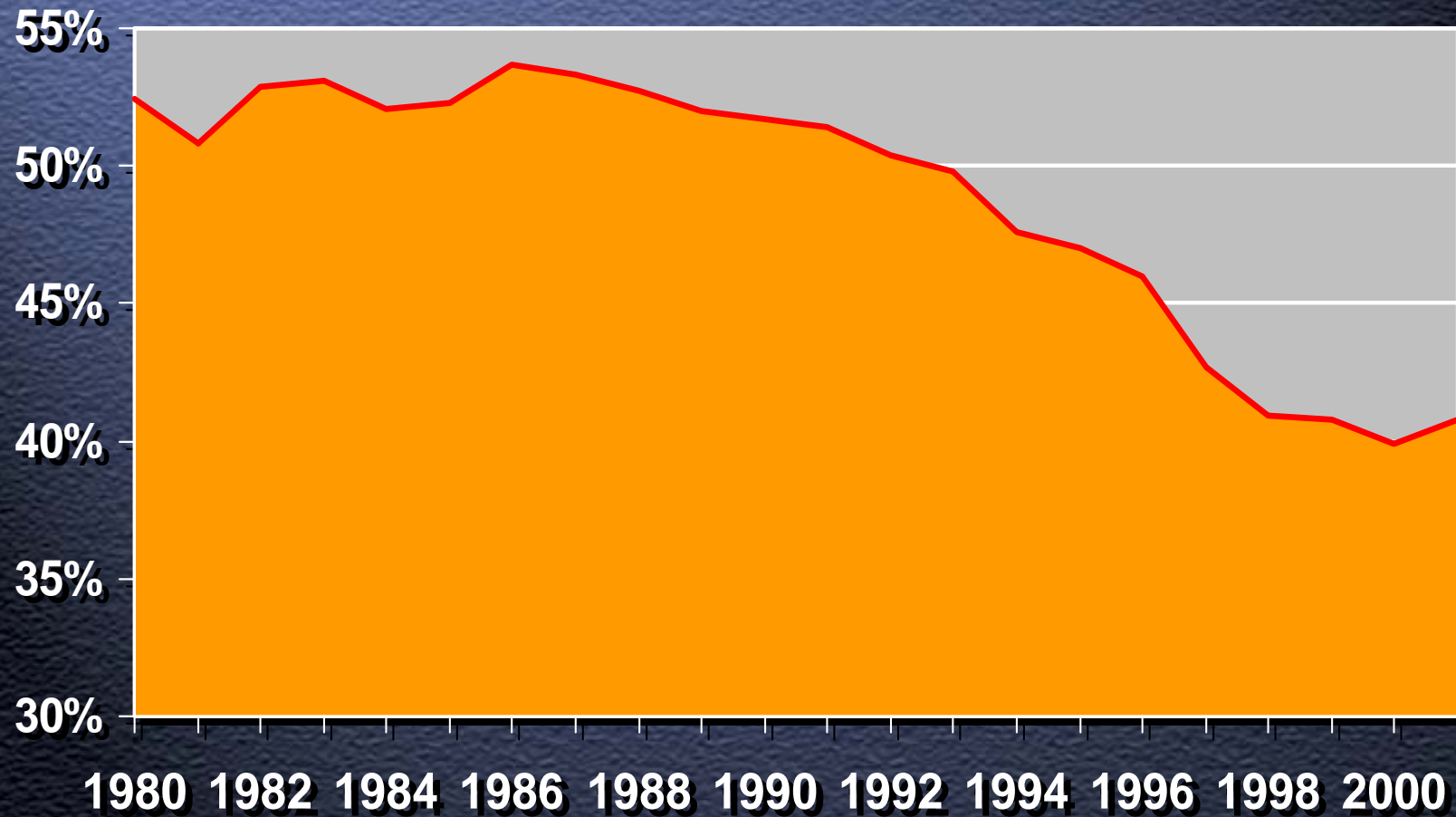
Million Bale Equivalents



Consumer Demand for Cotton in Non-U.S. Markets



Cotton Share of Total Fiber Use in Non-U.S. Markets*

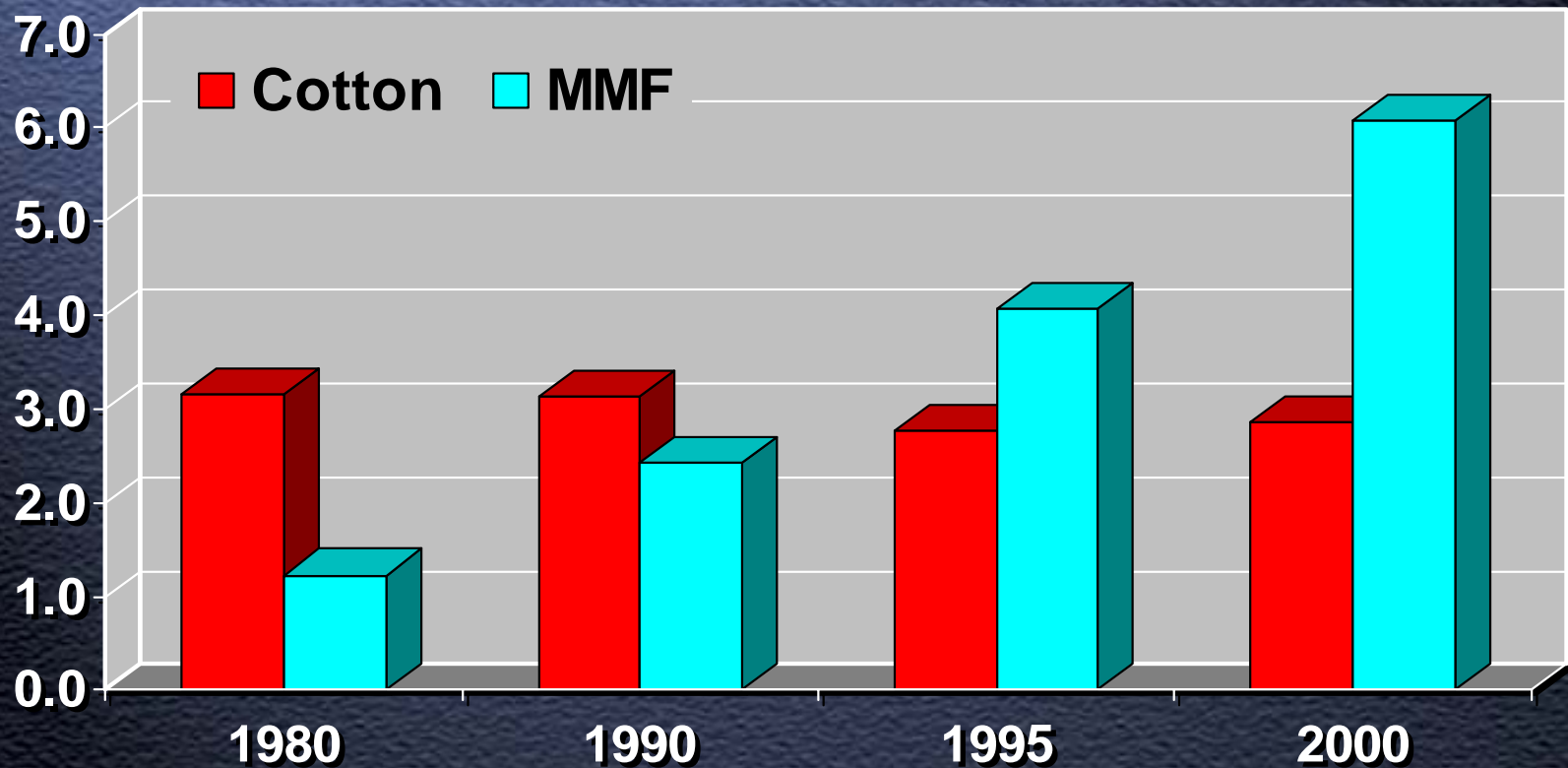


**Includes all fiber usage such as carpet and industrial markets.*

Historical Fiber Consumption

CHINA

Kg Per Capita

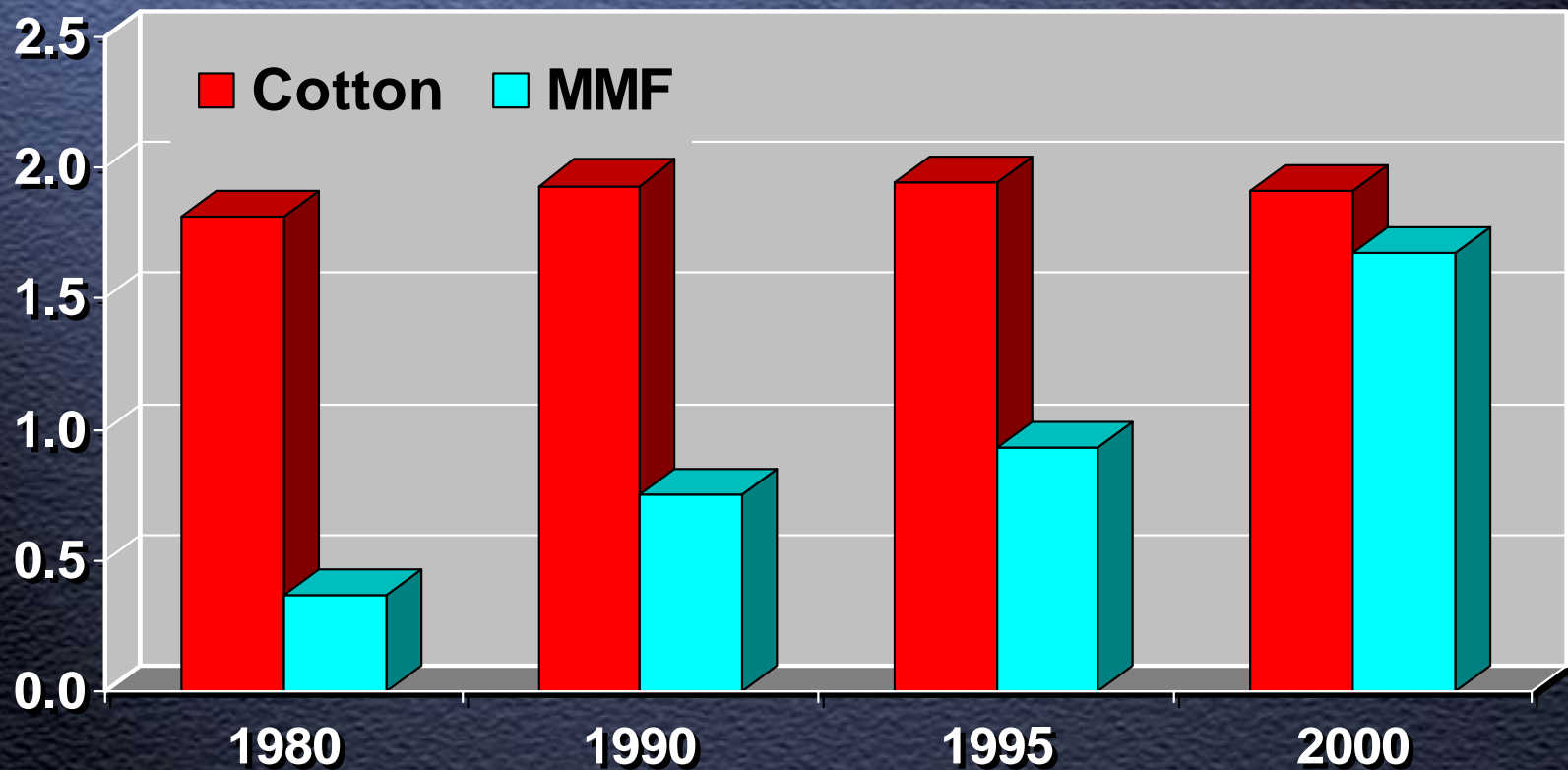


Sources: PCI Fibres & Raw Materials, China Population Information and Research Center

Historical Fiber Consumption

INDIA

Kg Per Capita

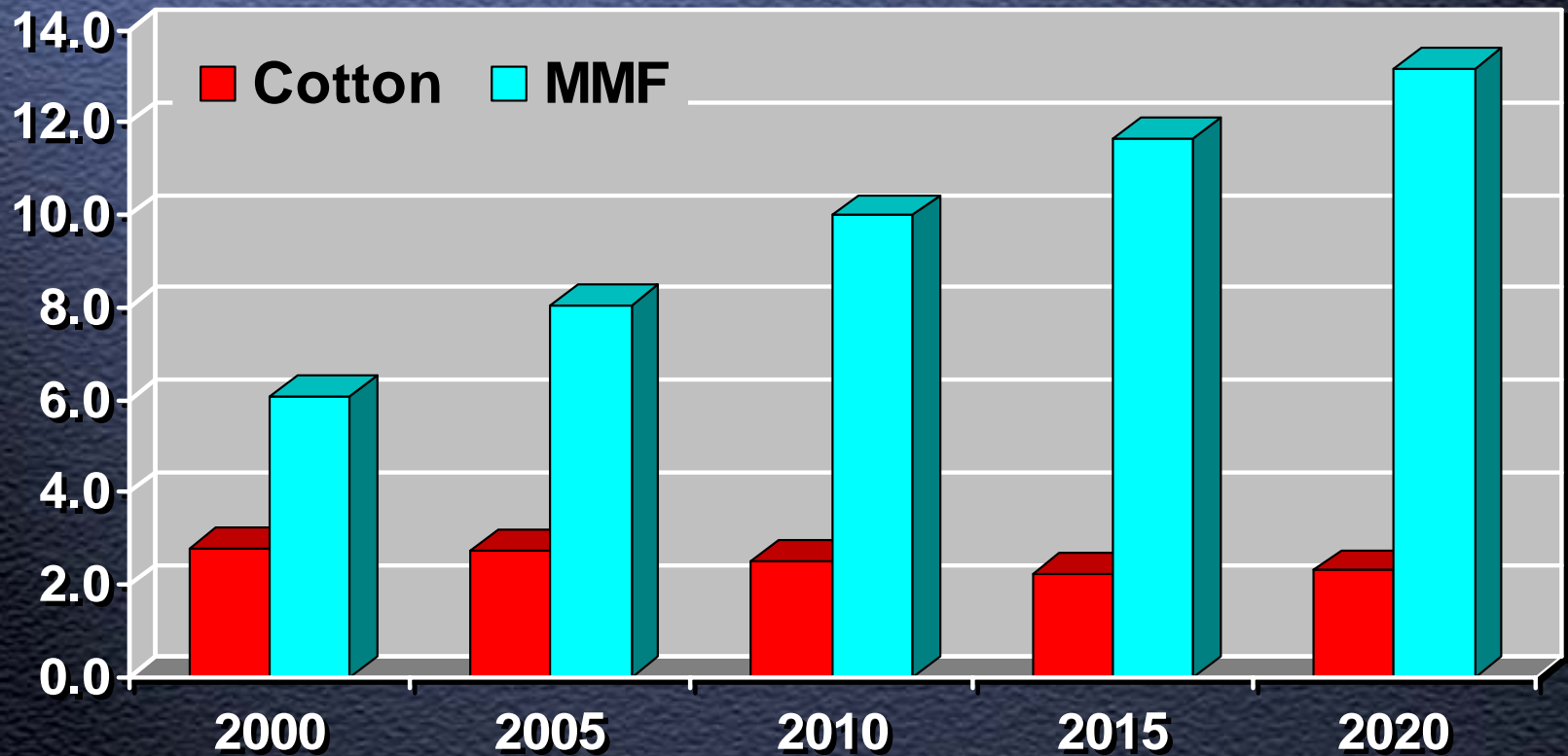


Sources: PCI Fibres & Raw Materials, Census of India

Projected Fiber Consumption

CHINA

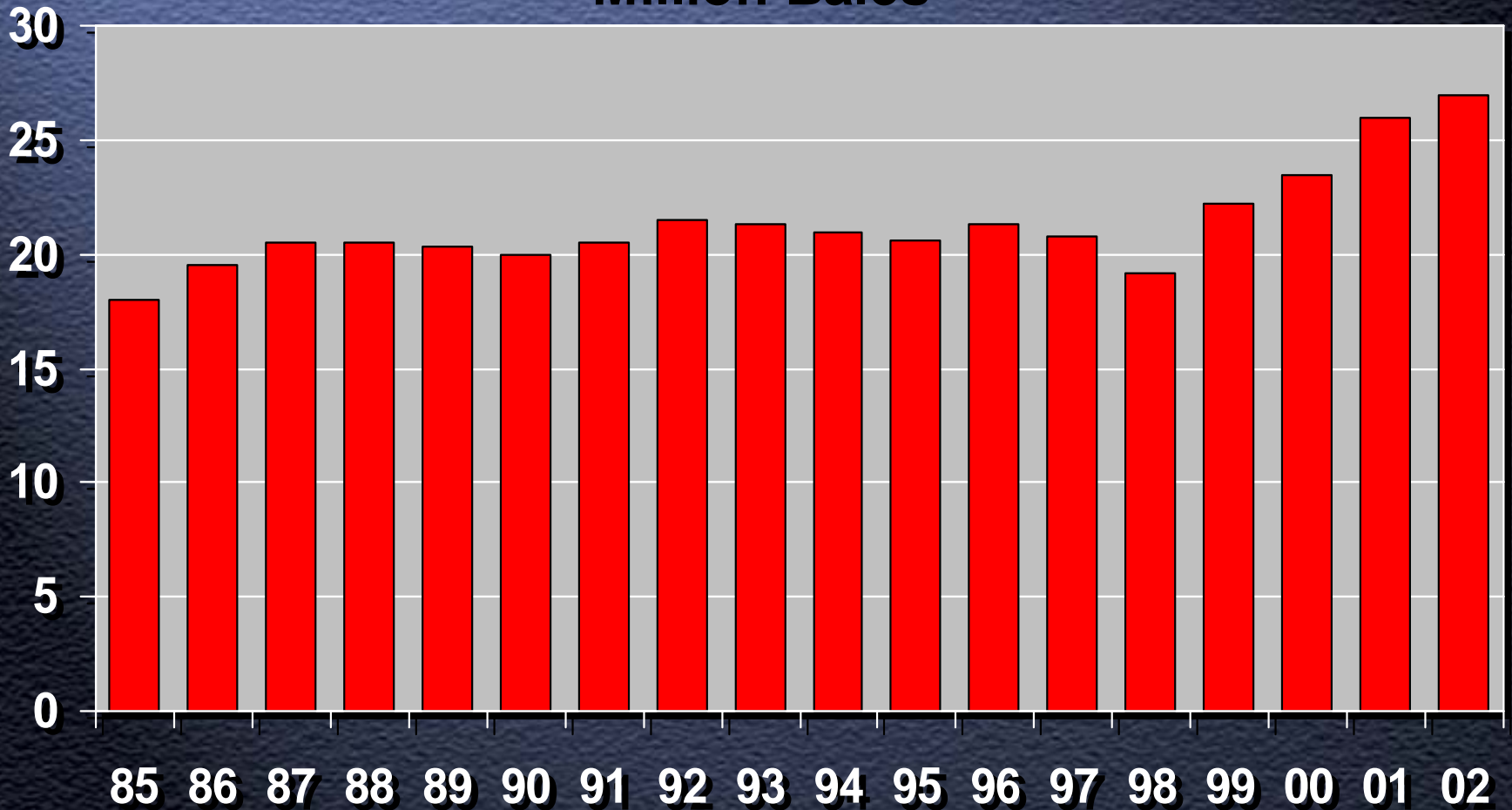
Kg Per Capita



Source: PCI Fibres & Raw Materials

China Cotton Mill Use

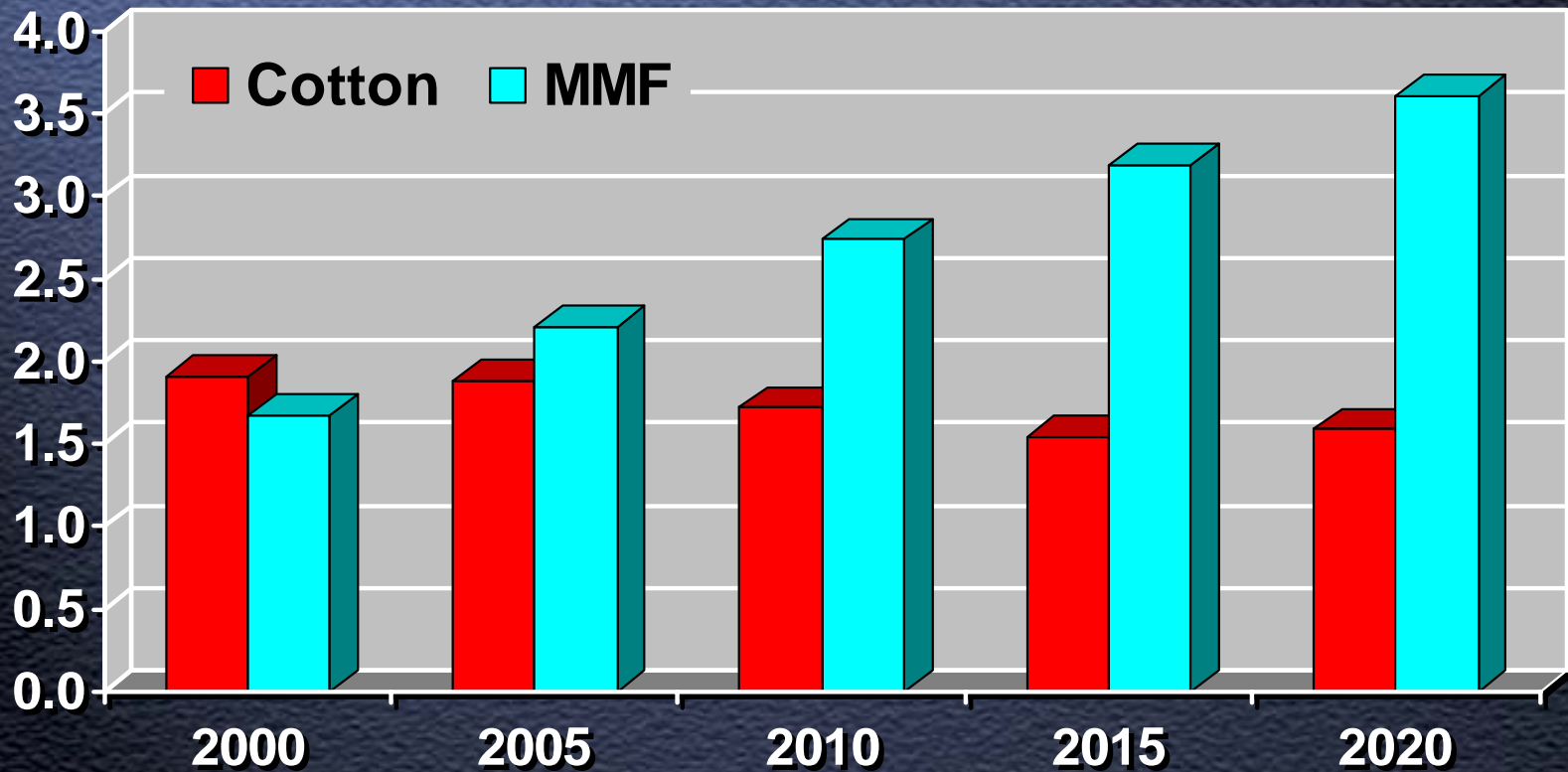
Million Bales



Projected Fiber Consumption

INDIA

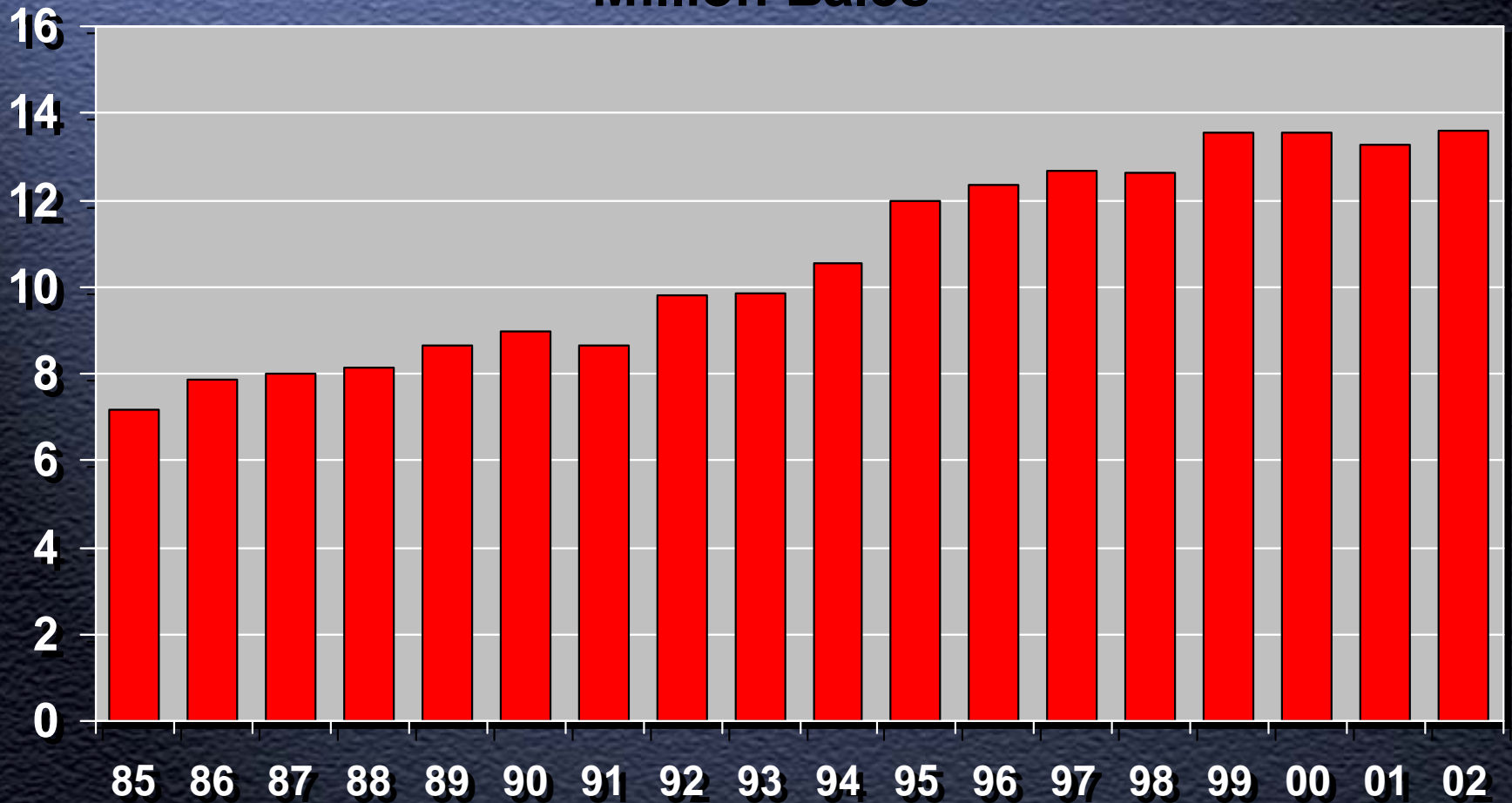
Kg Per Capita



Source: Cotton Council International

India Cotton Mill Use

Million Bales



Market Forecast for India, 1995-2005

Domestic Consumption of Textile Fibers is Expected to Double

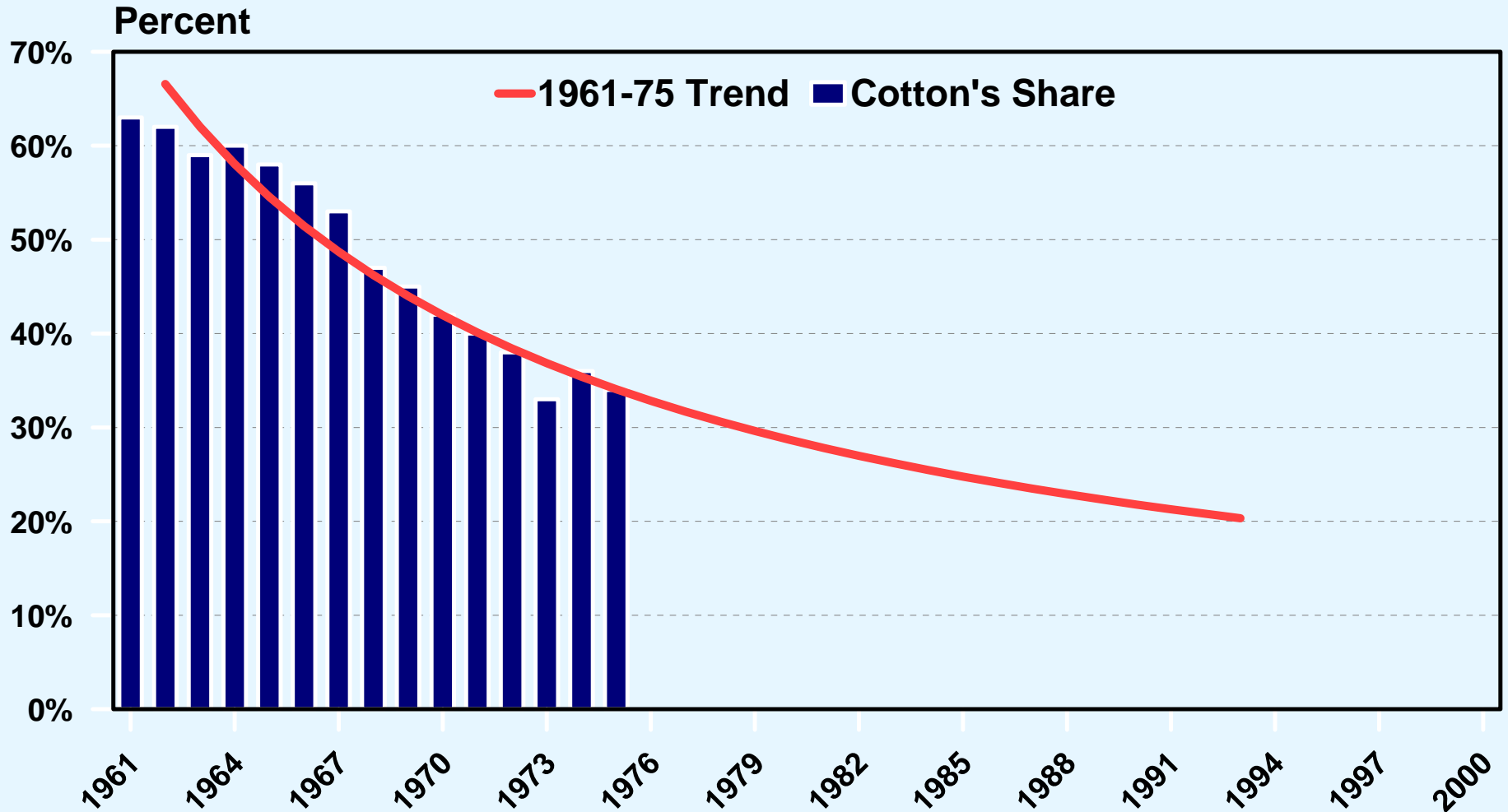
- **MMF:**
 - Market share is expected to increase from 32% to 55%
 - Overall volume growth of 13% per year
- **Cotton:**
 - Market share is expected to decrease from 68% to 45%
 - Overall volume growth of only 2.5% per year

***We Know That Cotton
Promotion Can Reverse
the Trend***



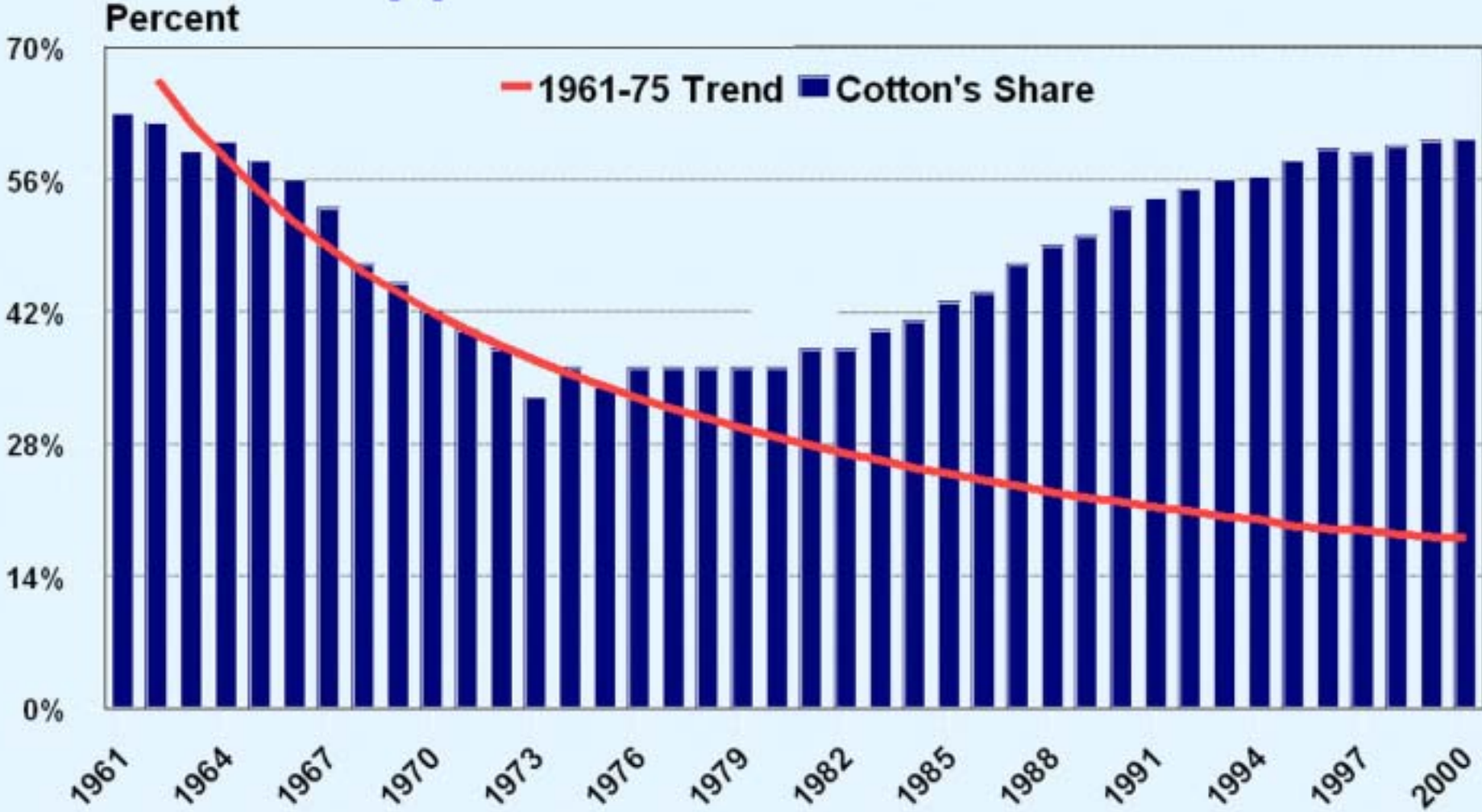
COTTON SHARE OF MARKET

APPAREL & HOME FURNISHINGS.*



Source: NPD and Trade Data
* Excludes Carpet

Cotton's Share of Market Apparel & Home Fabrics



Source: NPD and Trade Data
* Excludes Carpet

Cotton Demand a Function of Consumers'...

- **Ability to identify fiber content in apparel**
- **Knowledge of the advantages of 100 percent cotton products versus man-made fibers**
- **Positive “emotional bond” toward cotton**

Consumers Say *Cotton* is the Best Fiber for Today's Fashions

Cotton is Described as...

“Comfortable”

“Soft”

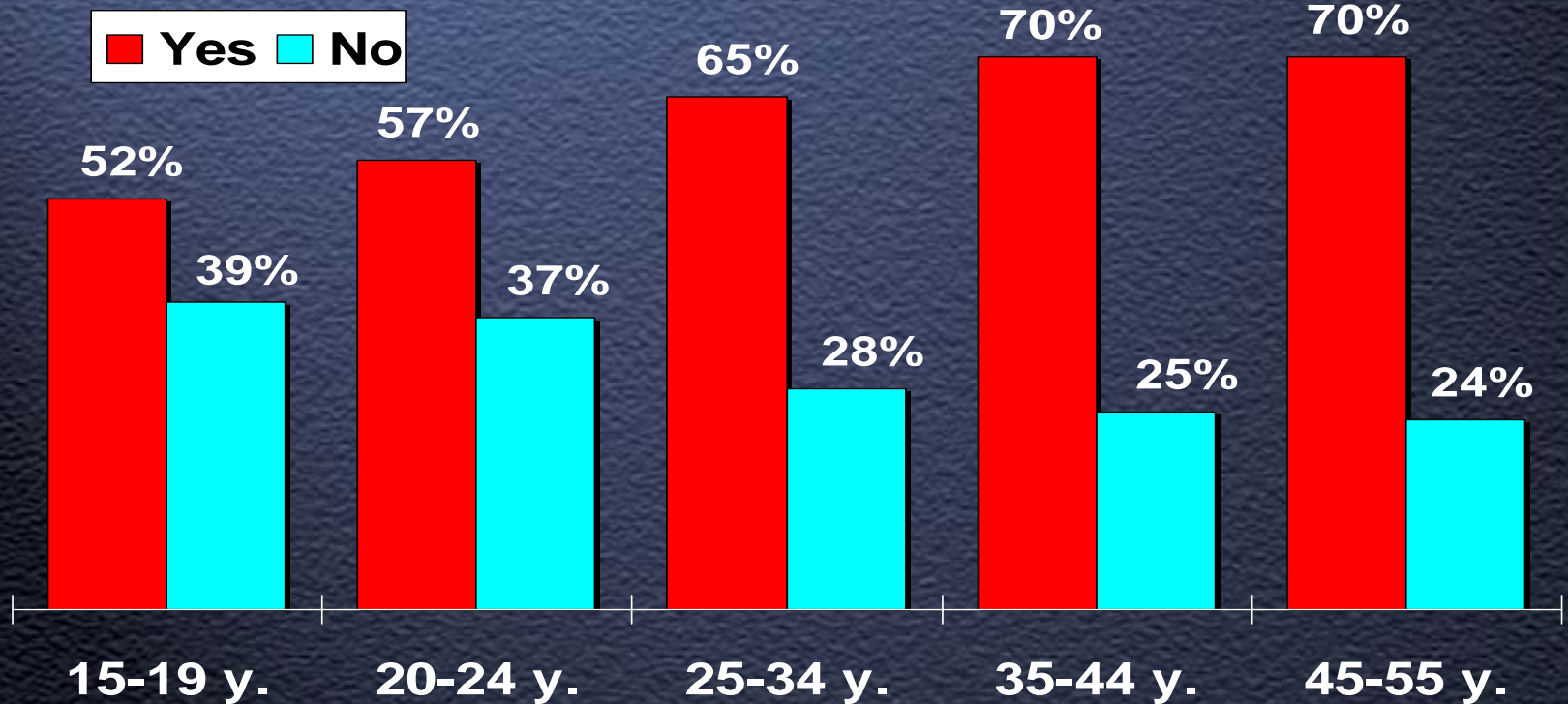
“Traditional”

“Breathable”

“Quality Fabric”

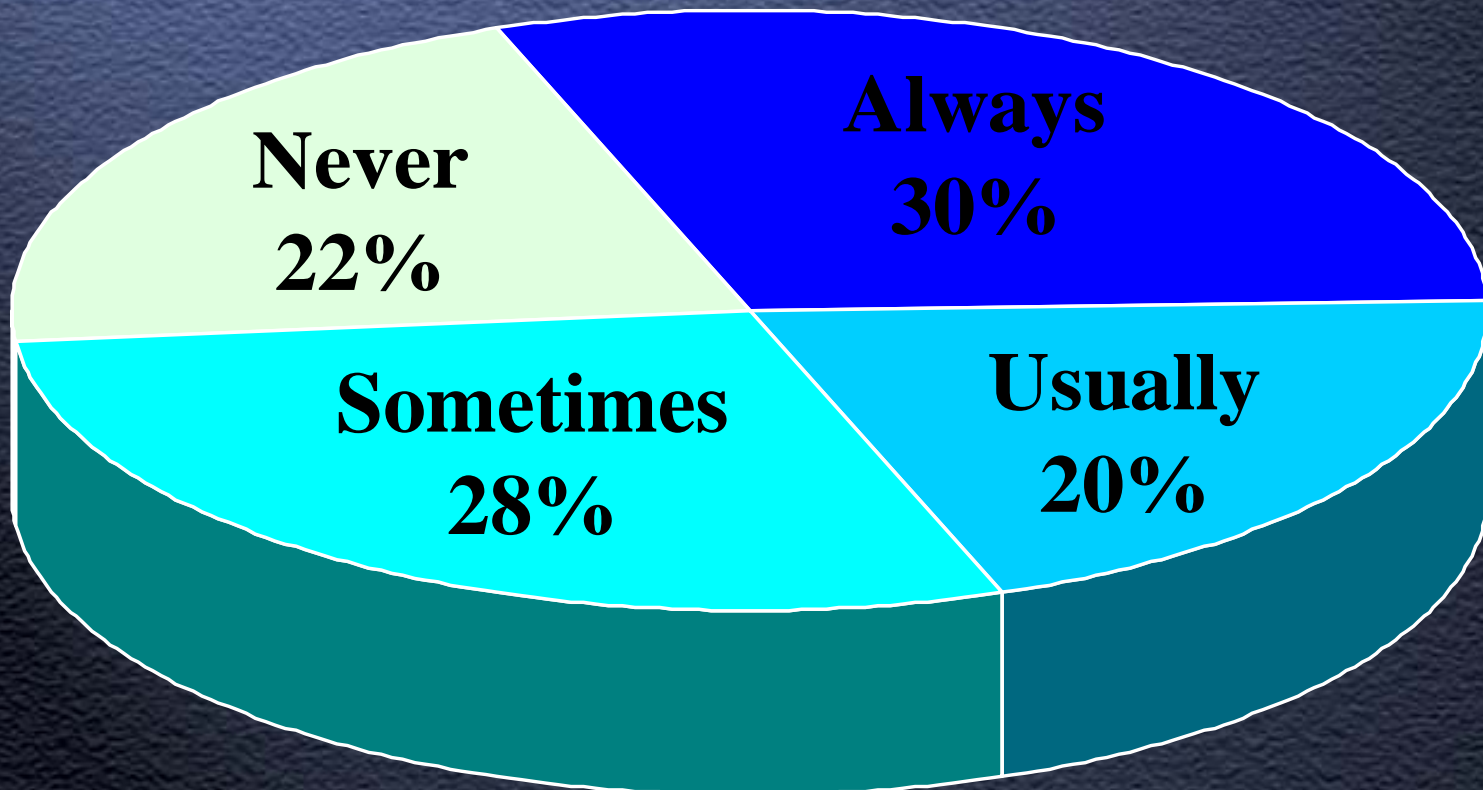
Willingness to Pay More for Natural Fibers Tied to Age

Would you pay more for clothes made from natural fibers?



More Than Three-Fourths Look for Fiber Content Labels

How often do you look for a garment's fiber content label?



*Do You Know Your
Country's Labeling
Laws???*

*Previous Promotion
Initiatives*





Mission

**To encourage
increased consumer
demand for cotton**

Objective

To encourage and facilitate national market development programs, organized by associations and commercial organizations in individual countries, and funded from domestic resources

Members

- **Cotton Australia Ltd. (Australia)**
- **Asociacao Brasileira da Industria Textil (Brazil)**
- **ALCOTEXA (Egypt)**
- **Egyptian-German Cotton Sector Promotion Program (Egypt)**
- **Bremen Cotton Exchange (Germany)**
- **East India Cotton Association (India)**
- **Associazione Tessile Italiana (Italy)**
- **Gdynia Cotton Association (Poland)**
- **Cotton South Africa (South Africa)**
- **Centro Algodonero Nacional (Spain)**
- **Asociación Industrial Textil de Proceso Algodonero (Spain)**
- **Agrupación Española de Desmotadores de Algodón (Spain)**
- **Turkish Textile and Raw Materials Exporters Association (Turkey)**
- **Liverpool Cotton Association (UK)**
- **Cotton Council International (USA)**
- **Cotton Incorporated (USA)**
- **The Cotton Company of Zimbabwe Ltd (Zimbabwe)**

www.icac.org/icac/ifcp

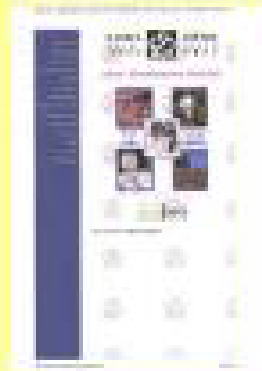
Individual Country Activities



Brazil



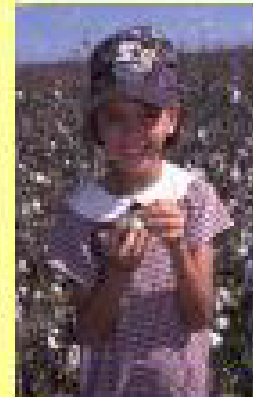
USA



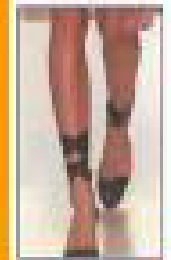
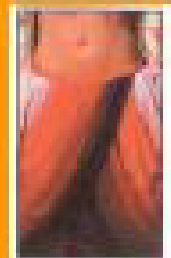
South Africa



Poland



Australia



Turkey



THE COTTON STORE







De qué estás hecho?

De Fortaleza

De Suavidad

De Libertad

Tu puedes estar hecho de lo que quieras, tus prendas preferidas están hechas con algodón de los Estados Unidos. Busca este símbolo de calidad sólo en las mejores marcas.

El algodón es tu fibra.

COTTON USA Image Advertising



Touches
every moment
in your life

ELLE
SPORTS

即日起至4月14日期內到下列
ELLE專權購買任何
COTTON USA貨品，即可獲
贈時尚電話繩及零錢包一組。



數量有限，送完即止。

ELLE專權

- WPP 利華3000
- 利華第二線
- 立立BLINI
- 天少利新世界品牌
- 沙田新城市廣場
- 九龍彌敦道廣場

COTTON USA Bonds to the Consumer by Touching Every Moment in Your Life

COTTON USA Retail Advertising



COTTON USA Sales Promotions



コットンUSAのストライプTシャツ。全長100%コットン。全長100%コットン。



コットンUSAの白いTシャツ。全長100%コットン。全長100%コットン。



コットンUSAのダークグレーのTシャツ。全長100%コットン。全長100%コットン。



コットンUSAのストライプTシャツと黒いパンツ。全長100%コットン。全長100%コットン。



コットンUSAの白いTシャツ。全長100%コットン。全長100%コットン。

触ってみれば、ちがいがわかる。
それが、アメリカ綿。

素材にこだわる「トーヨーカード」が、
身につける人の気持ちで選んだコットン。
それがアメリカ綿。「コットンUSAマーク」です。
あなたも店頭で、その気持ちよさを
実感してください。



株式会社イトヨカド 本社：〒100-0001 東京都千代田区千代田1-1-1 (電話) 03-5561-1111
各支店・店舗の営業時間、サービス内容は各支店・店舗のホームページをご覧ください。

お客様に提供される
上質なアメリカ綿だけを厳選し、
綿葉に近づけてある
「コットンUSAマーク」は、
綿葉の品質が保証する、
優かなコットンの選りです。



コットンUSAマークは、国際棉花評議会の
Cotton Quality Internationalの登録商標です。
電話：03-5561-1111 03-5561-1111

国際棉花評議会
Cotton Council International

本誌掲載の情報は各支店・店舗のホームページに掲載されているものと異なる場合があります。また、店頭でのトーヨーカードは必ずご確認ください。

무엇이든 흥했어!!! 예신 사랑의 패션콘서트 交感



(주)예신퍼슨스가 미국코튼마크, KMTM와 마련하는 사랑의 옷 나누기

Fashion Concert 交感

When?

2008년 11월 3일 토요일 오후 6시
올림픽공원 평화의 광장

Who?

김현중, 김현정, Duke, D-Base,
백지영, 성시경, 임정화, 루아, 외 다수

Ticket?

매부차: ONG, KCB, maru, NOTON 전국대리점
기 간: 2008년 10월 5일금부터 전하는 무료케모



내가 즐기 입던 옷 특별한 의미가 담긴 옷 나누고 싶은 옷 그들지만 헤어지지 못한다면 교감 콘서트에
기증하면 수색하고 세탁해서 어려운 우리 이웃들과 친구들에게 선물하는 멋진 콘서트의 길이 길었?

예신 패션콘서트 - 후원인 (주)예신퍼슨스와 미국코튼마크, KMTM가 함께합니다
후원 (주)예신퍼슨스(ONG, KCB, maru, NOTON), 미국코튼마크, KMTM

www.yeshin.co.kr
문의처 0222541-7500

Cotton Day Promotion

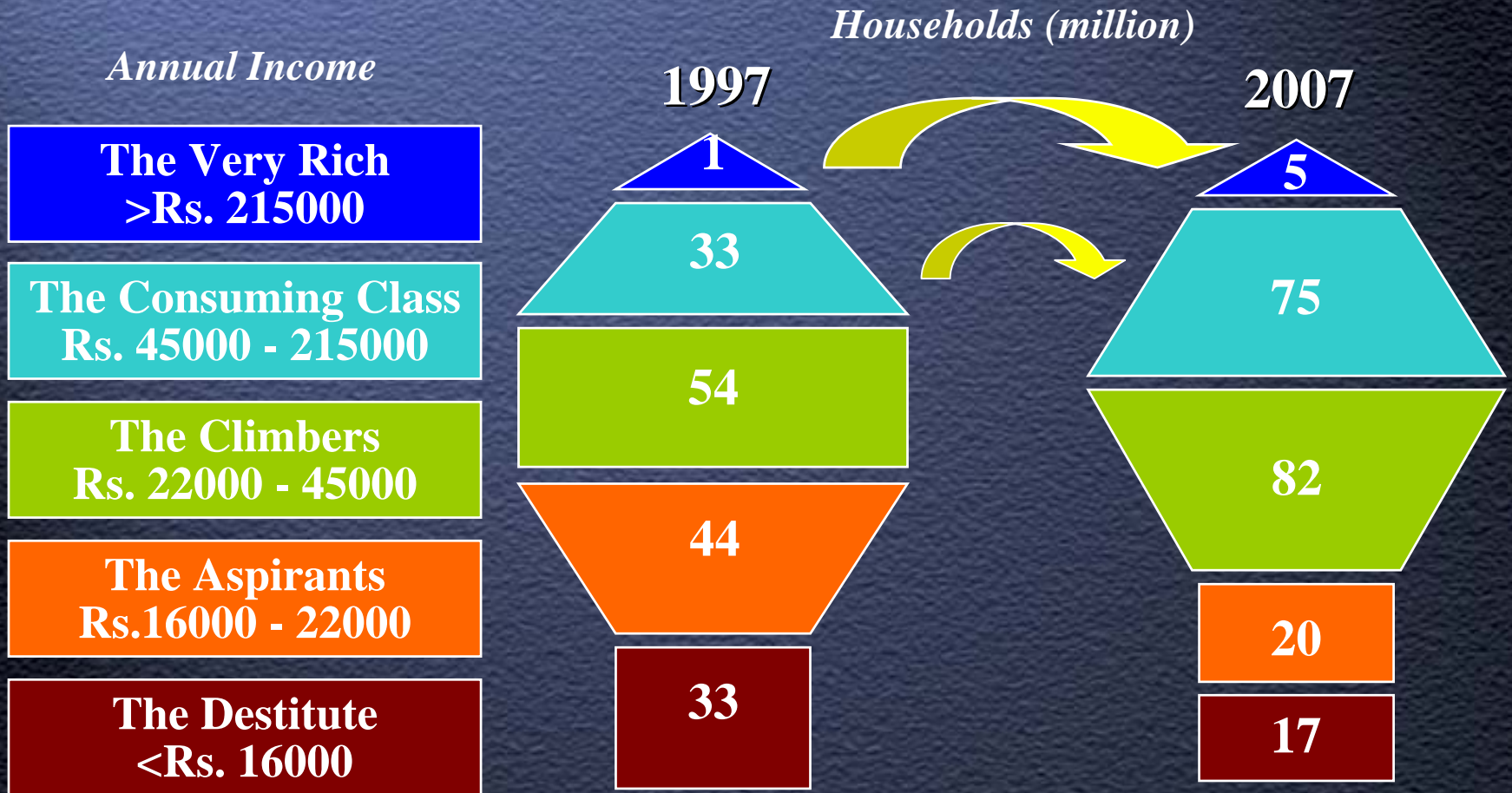


Cotton Gold Alliance



Cotton Council International
Cotton Incorporated

India's Growing Middle Class



Source: NCAER

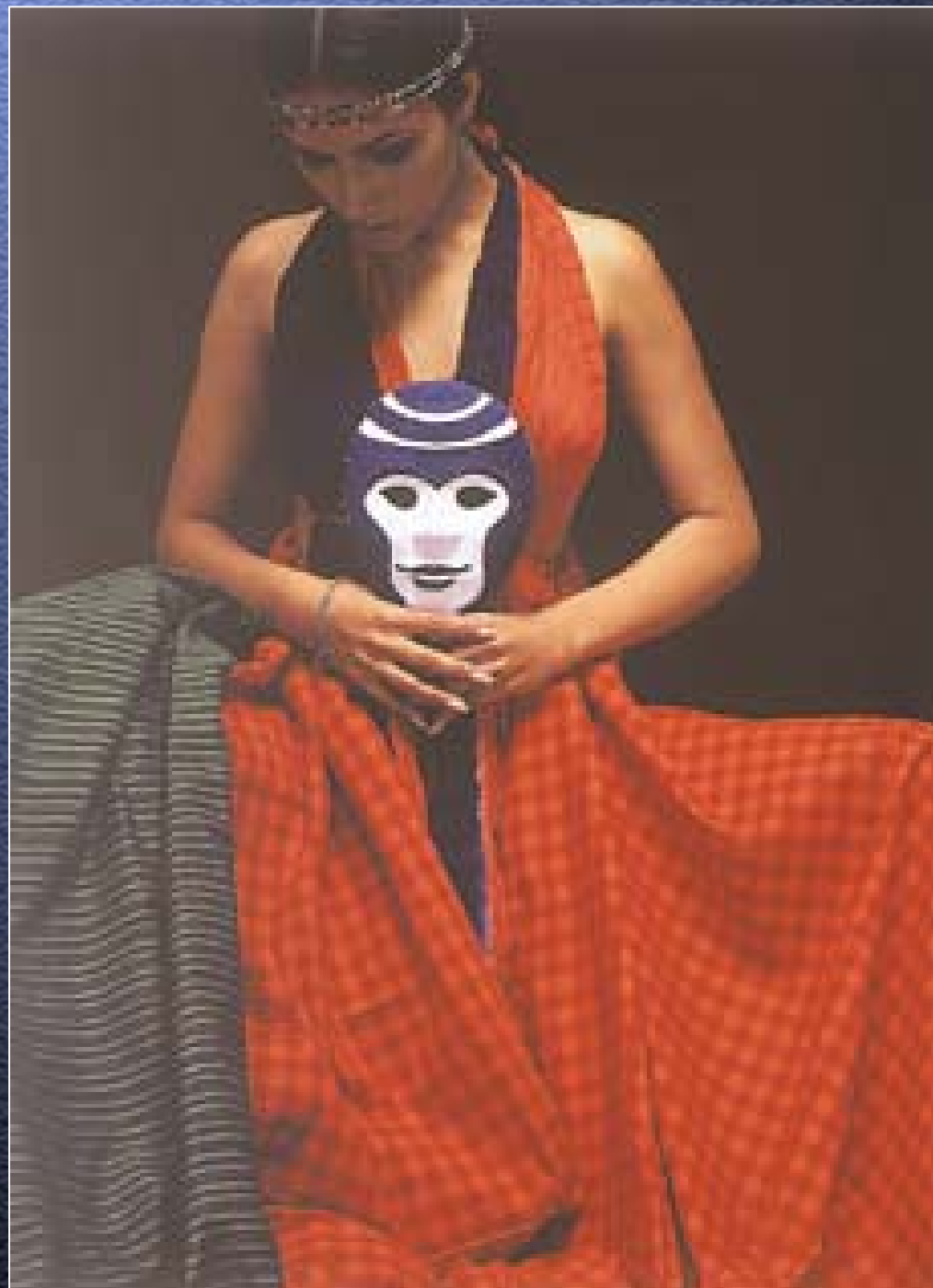
Indian Attitudes Towards Fiber

Among Indian consumers surveyed by BAI Global in 2001:

- 69% said “It’s important that my clothes are made from natural fibers”
- 75% said “I think that better quality clothes are made from 100% natural fiber
- 71% said *cotton* is the best fiber for current styles

The New Face of Cotton







The New Face of Cotton Now in India. The Seal of Cotton allows consumers to readily identify textile products containing quality cotton. Use the Seal on your textile products to reassure your customers that they are buying world-class textile products.

International Trustmark

Art. 1000.002

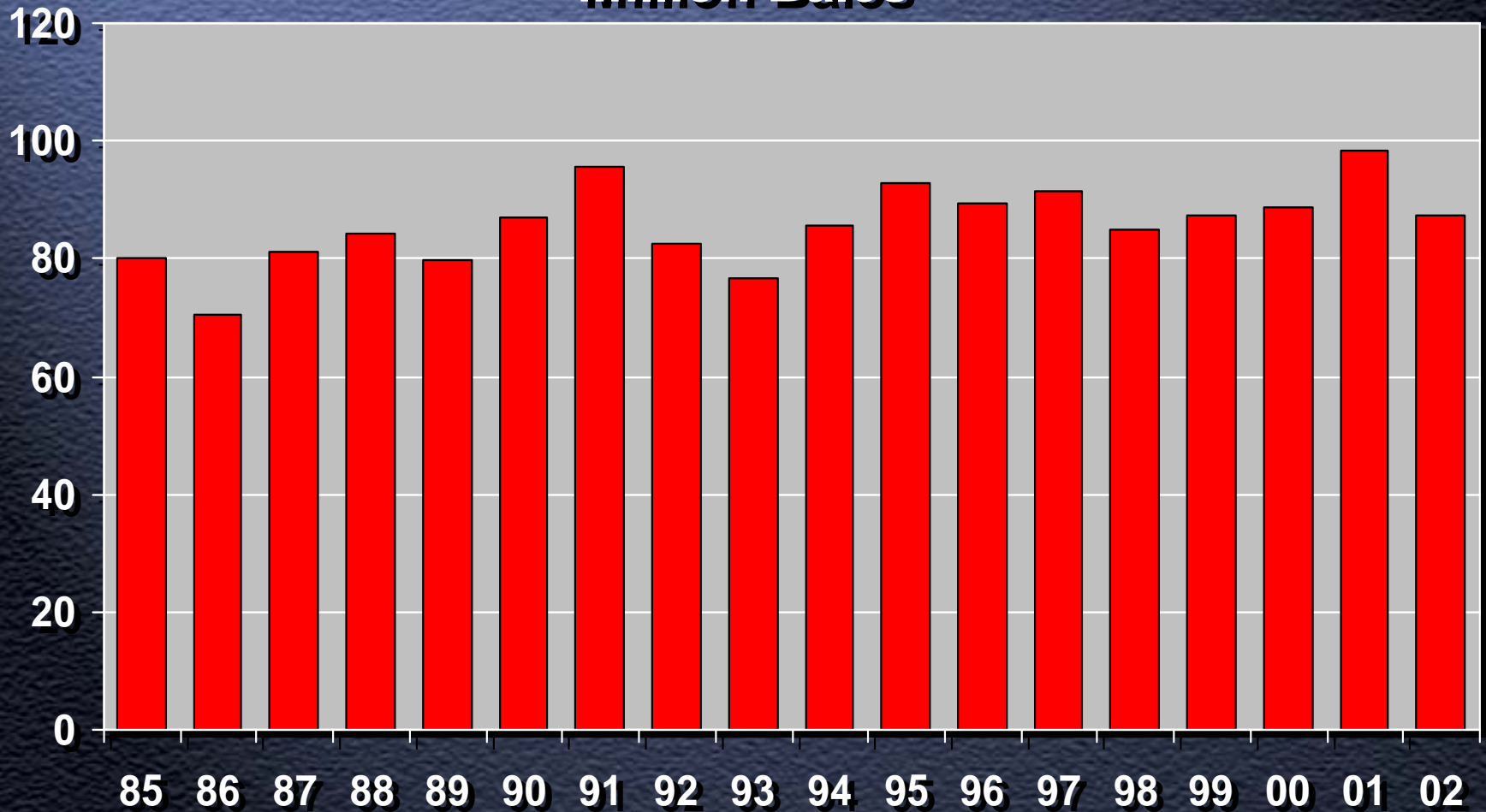
Challenges to Promotion

- **Significantly Underfunded**
- **Synthetic Competition**
- **National Policies**
- **Lack of Labeling Laws**
- **National Competition**
- **Beating Each Other Over Supply**

**A Supply-Demand
Equation Has 2 Sides —
We Need to Work the
Demand Side!!!**

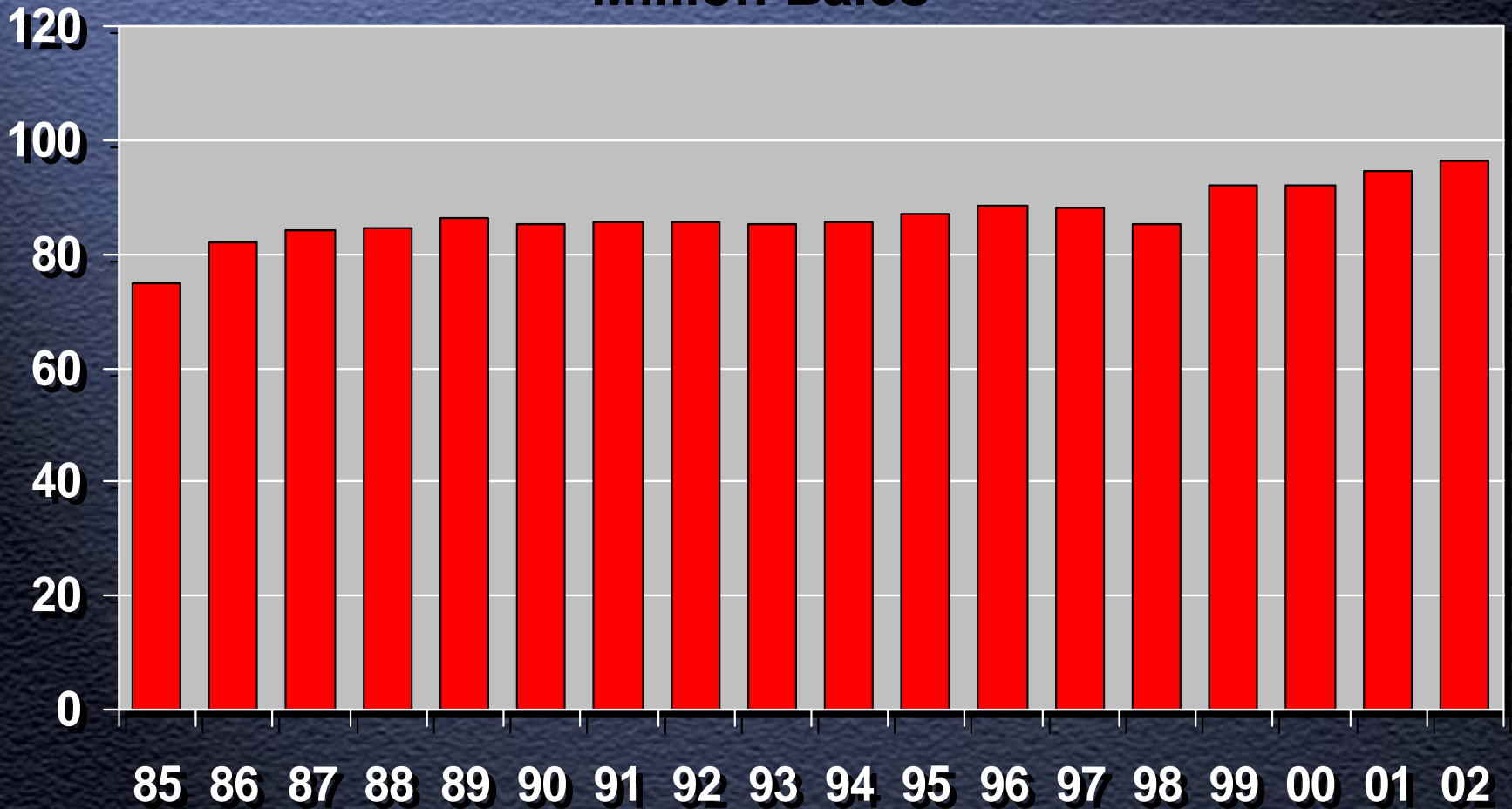
World Cotton Production

Million Bales



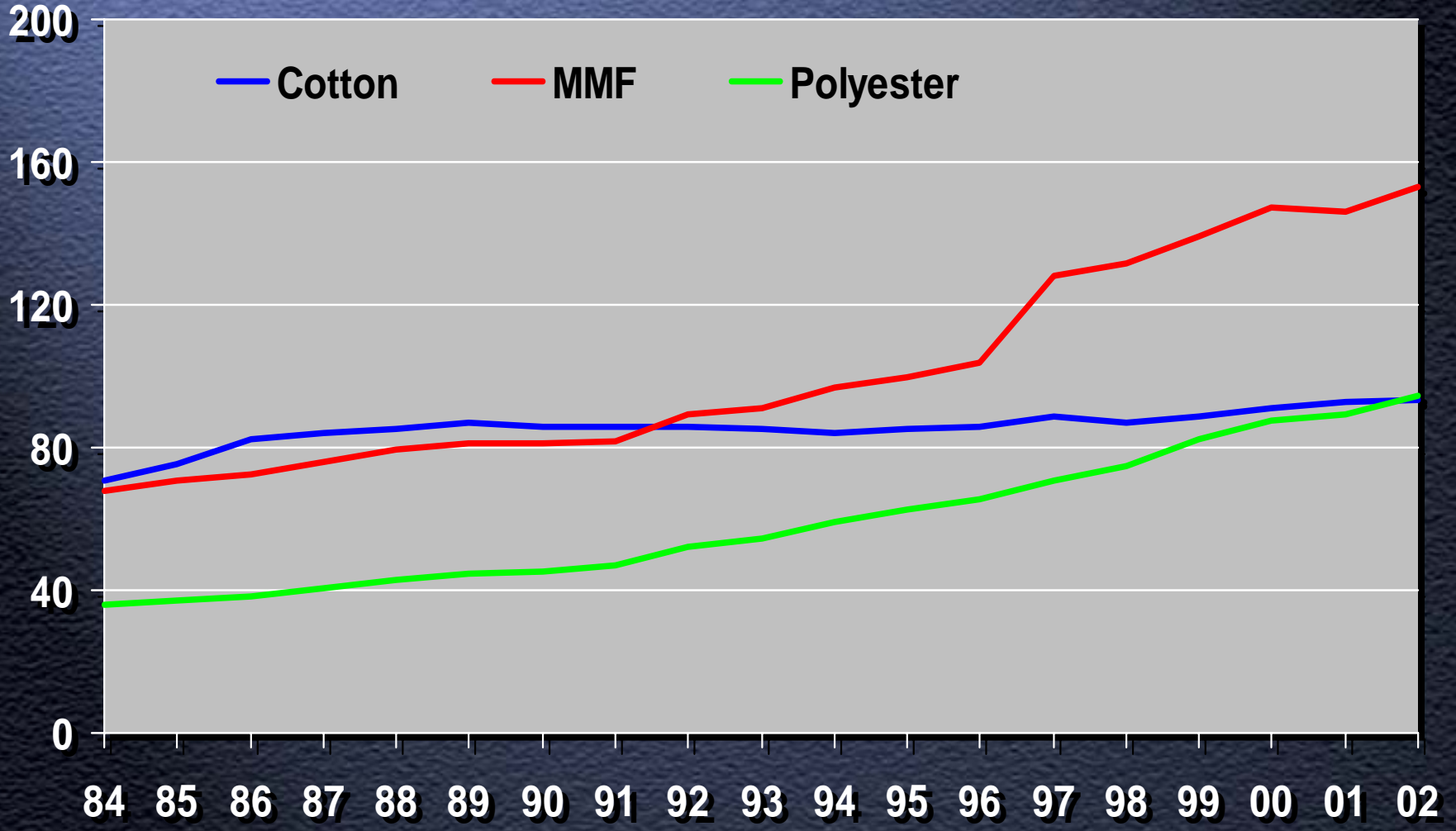
World Cotton Mill Use

Million Bales



Global Fiber Demand at Retail Level

Million Bales



Source: NCC, Feb. 2003

