AGENDA

- An Introduction to **U.S. Cotton and Cotton Council International**
- The **COTTON USA™ Brand**
- COTTON USA™ promotion initiatives- “WHATS NEW IN COTTON™”
- Key drivers of global cotton and fiber demand
- Consumer and retail trends in India
- Consumer attitude towards cotton
- Summary
CCI was **formed in October of 1956** by the National Cotton Council and works closely with the U.S. government to **drive U.S. agricultural exports**.

- We are **funded by the U.S. government** as part of the Farm Bill and by the U.S. cotton industry.

- CCI is **a non-profit organization**. We do not make, buy or sell anything. Our only job is to “**promote**” **U.S. cotton** via various means around the world.
CCI TODAY: WHO WE ARE

- Headquartered in Washington DC.
- 20 people in the U.S.
- 30 people overseas in 17 countries.
CCI INTRODUCTION

- **CCI works** with spinning mills, fabric and garment manufacturers, brands and retailers, textile associations, governments and the USDA in many countries and every continent to facilitate the use of U.S. cotton.

- Our work is **based on relationships** and we work closely with cotton spinning and fabric manufacturing companies to build connections across the entire supply chain.
THE BRAND

COTTON USA

THE COTTON THE WORLD TRUSTS
COTTON COUNCIL INTERNATIONAL AND COTTON USA

COTTON USA™ is the brand name for all U.S. grown cotton that is owned by Cotton Council International and that we promote globally.
THE COTTON USA BRAND

More than 51,000 product lines and 3.8 billion products have proudly carried the name COTTON USA™ since 1989.
COTTON USA™ MARK LICENSING

- Mills,
- manufacturers,
- wholesalers,
- sourcing companies,
- brands and
- retailers

can license their U.S. cotton-rich products, including blends (at least 51% U.S. cotton).
CONTINUOUS IMPROVEMENTS IN THE FIBER PARAMETERS*

Staple Length Improvements

*For Upland Cotton only
35 YEARS
REDUCED ENVIRONMENTAL IMPACT

US COTTON SUSTAINABILITY GOALS BY 2025

<table>
<thead>
<tr>
<th>Field to Market’s National Metrics</th>
<th>Improvements by 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduce Land Use (Acres per Lb of Fiber)</td>
<td>13%</td>
</tr>
<tr>
<td>Increase Fiber per Gallon of Water (Irrigation Efficiency)</td>
<td>18%</td>
</tr>
<tr>
<td>Reduce Greenhouse Gas Emissions (Lbs CO2e per Lb of Fiber)</td>
<td>39%</td>
</tr>
<tr>
<td>Reduce Energy (Btu/Lb of Fiber)</td>
<td>15%</td>
</tr>
<tr>
<td>Reduce Soil Loss (Tons/Acre)</td>
<td>50%</td>
</tr>
<tr>
<td>Increase Soil Carbon (% of Fields)</td>
<td>30%</td>
</tr>
</tbody>
</table>
TRANSPARENCY
Every cotton bale has a permanent bale tag that identifies where the cotton was grown along with its characteristics including fiber length, strength, color, micronaire, etc.
PREMIUM VALUE

The COTTON USA™ Mark is a sign of softness, strength, comfort and sustainability to consumers around the world.

It identifies superior cotton products made with a majority of cotton grown in the USA.

COTTON USA™ BRAND DRIVES CONSUMER PREFERENCE.
INNOVATION
WHAT’S NEW IN COTTON™

COTTON USA is committed to bringing you the latest in cotton innovation. It’s part of the premium value we offer the entire cotton supply chain.

_Innovations Designed, To Drive Your Business_

Discover high tech natural cotton blends that do everything from reducing workout recovery times to inhibiting bacteria.
WHAT’S NEW IN COTTON™

ZERO-D® - “Dry dye™” with Reactive Pigment®
ZERO-D® print solution preserves U.S. cotton’s natural feel. Excellent colors and fabric choices allow a broader product range.

To know more click on the link: https://cottonusa.org/innovation/zero-d-the-sustainable-answer-to-ai-fashion

SigNature®T. Know Where Your Clothes Come From.
COTTON USA™ has partnered with ADNAS and their SignatureT technology to create cotton-rich apparel that can be traced back to the farm where the cotton was grown.

To know more click on the link: https://cottonusa.org/innovation/signature-t-traceability-transparency-trust

DRY PROTECT™. The Natural Choice for All Day Comfort.
The partnered technology Proneem create clothes that eliminate unpleasant body odors and absorb moisture, for comfort all day long.

To know more click on the link: https://cottonusa.org/innovation/signature-t-traceability-transparency-trust
WHAT’S NEW IN COTTON™

SolucellAir. The Durable, Quick Drying, Softie.
SolucellAir and Zero-Twist technologies help to produce long-lasting home textile products that are soft, light weight, and fast drying.
To know more click on the link: https://cottonusa.org/innovation/solucell-a-new-wave-of-comfort

Celliant®. For Faster Workout Recovery Times.
Can your yoga pants help improve blood flow and recovery time? Yes, with Celliant. A revolutionary concept in workout wear.
To know more click on the link: https://cottonusa.org/innovation/celliant-recover-from-workouts-faster

Introducing anti-bacterial towel and bed linens made with US Cotton and Life Natural materials.
To know more click on the link: https://cottonusa.org/innovation/life-natural-anti-bacterial-the-natural-way
COTTON USA™ – COLLABORATION BENEFITS

Cotton Council International (CCI) is focused towards the promotion of the US Cotton and retains the brand COTTON USA™ with utmost trust carried by their consumers.

- CCI values the brands which carry COTTON USA™ tags along with them.

- CCI participates in various trade shows throughout the world

- COTTON USA™ helps the associated brands with the marketing support

- Sharing of market research reports with latest trends and technology in the industry

- Preferences in the participation of conferences and seminars conducted globally
COTTON USA Sourcing Fair in Hong Kong: CCI’s largest global sourcing fair to date with participants who annually purchase 2.4 billion meters of fabric.

Glimpse of 2018
- Yarn/Fabric Suppliers: 62
- Garment Suppliers: 47
- Brand/Retailers: 41

Sourcing USA Summit: Facilitated U.S. cotton networking opportunities for some 415 delegates from 31 countries in attendance representing 18.5 million bales of cotton.

COTTON USA Sourcing Fair in Mexico: Approximately 800 individual business meetings.
RESEARCH & DEVELOPMENT SUPPORT

Cotton Council International along with its associate Cotton Incorporated also a not-for-profit company providing the resources and research needed to help companies develop and market superior, innovative, and profitable cotton products. The company’s efforts are focused across every area of the cotton life cycle from fiber through finished product.

The research covers topic like

- Global Trends and Challenges
- Consumer research
- What’s new in the market
- Influence of Sustainability On Clothing
- All About retail
- Traditional Retail
- and many more...
JOINT MARKETING & PROMOTION

Cotton Council International collaborates and supports the licensee brands for their co-branded promotional activities for their qualified licensed COTTON USA products.

Promotional activities like
- In-store promotion
- Press release
- Print advertisements
- Brand / Store Audits
KEY DRIVERS OF GLOBAL COTTON AND FIBER DEMAND
Influencers of World Cotton Demand

- Per Capita Economic Growth
- Fashion & Fabric Trends
- Population Growth
- Fiber Prices
- Supply Constraints
- Sustainability
# Impact of Global Per Capita GDP on Per Capita Cotton Demand

(Excludes Impact from Fiber Prices & Fashion-Related Trends)

<table>
<thead>
<tr>
<th>Per Capita GDP</th>
<th>Per Capita Cotton Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>-2.0%</td>
</tr>
<tr>
<td>0.5%</td>
<td>-1.5%</td>
</tr>
<tr>
<td>1.0%</td>
<td>-1.0%</td>
</tr>
<tr>
<td>1.5%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>2.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2.5%</td>
<td>0.4%</td>
</tr>
<tr>
<td>3.0%</td>
<td>0.9%</td>
</tr>
<tr>
<td>4.0%</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

Source: Cotton Incorporated World Fiber Demand Model
### Major Historical Demand Disruptions for Cotton

(Excludes Impacts from Economic Growth, Price & Population)

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Description</th>
<th>Annual Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1969-82</td>
<td>Strong Trend to Polyester</td>
<td>-6.1%</td>
</tr>
<tr>
<td>1986-91</td>
<td>Cotton Recovery (Denim, Khaki, Knits)</td>
<td>+7.6%</td>
</tr>
<tr>
<td>2004-07</td>
<td>China Cotton Demand Surge</td>
<td>+7.1%</td>
</tr>
<tr>
<td>2012-16</td>
<td>Demand Destruction: Poly Trend</td>
<td>-6.0%</td>
</tr>
</tbody>
</table>

Source: Cotton Incorporated World Fiber Demand Model
## Impact on Cotton Demand from 10% Rise in Inflation Adjusted Cotton & Polyester Prices

<table>
<thead>
<tr>
<th>Real Increase in Fibre Price</th>
<th>Impact on Per Capita Cotton Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cotton Price +10%</td>
<td>-1.1%</td>
</tr>
<tr>
<td>Polyester +10%</td>
<td>+0.6%</td>
</tr>
</tbody>
</table>

Source: Cotton Incorporated World Fiber Demand Model
## Fabric Weight and Over time and Impact on Cotton

<table>
<thead>
<tr>
<th>YEAR</th>
<th>DENIM (In Oz/sq yard)</th>
<th>T-SHIRTS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>14</td>
<td>5.5</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>11</td>
<td>4.5</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>9</td>
<td>4.6</td>
<td></td>
</tr>
<tr>
<td>Change in last 10 years</td>
<td>-36%</td>
<td>-16%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Cotton Incorporated FABRICCAST™ DATA BASE
## Cotton Bale Use by 2030
(Million 480 Pound Bales)

<table>
<thead>
<tr>
<th>Date</th>
<th>Low</th>
<th>Middle</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>127</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>2030</td>
<td>143</td>
<td>151</td>
<td>157</td>
</tr>
<tr>
<td>Growth Rate</td>
<td>1.14%</td>
<td>1.55%</td>
<td>1.87%</td>
</tr>
</tbody>
</table>
World Per Capita Cotton Demand

Source: USDA for history. Cotton Incorporated World Fiber Demand & Supply Models for Projections
CONSUMER AWARENESS AND CONCERN
(Microfiber waste is a top concern for those aware of fiber production issues)

Average aware of issues

25%

84%

Concerned with microfiber waste

Source: CCI & Cotton Incorporated’s 2017 Global Environment Survey
Microplastics Issue

Microplastics pollution widespread

Source: Adventurers and Scientists for Conservation Microplastic Study
Microfiber Research

Cotton Research on Microfiber Degradation

Aquatic Biodegradation – Results

Source: North Carolina State University Research

76% Cotton
4% Polyester
Influence of Sustainability on Clothing Purchases

Sustainability clothing matters to consumers

Source: CCI & Cotton Incorporated’s Global Environment Survey 2017
Motivation for Sustainable Actions

Protecting the world, doing the right thing, and healthy living motivate action

- *To protect the world for my children/grandchildren/future generations*
  - Mexico: 69%
  - Italy: 63%
  - U.S.: 59%
  - U.K.: 59%
  - Germany: 57%

- *Simply because it is the right thing to do*
  - India: 56%
  - China: 50%

- *To live a more balanced/healthier lifestyle*

Source: CCI & Cotton Incorporated’s Global Environment Research 2017
CONSUMER AND RETAIL TRENDS IN INDIA
CONSUMER & RETAIL INSIGHTS

300,000+
INTERVIEWS CONDUCTED

1,500,000+
GARMENTS AUDITED

625,000+
REVIEWS ANALYZED
Global Apparel Spending 2030
Growth from 2016 to 2030 (Billions USD)

Source: Euromonitor International
Global Trends and Challenges

*Indian consumers have a strong interest in clothes*

**Preferred Item to Shop**

- Clothes – 67%
- Food – 7%
- Electronics – 7%
- Cosmetics – 6%
- Shoes/Accessories – 5% each

**Top Purchase Drivers**

- Fit
- Comfort
- Quality
- Finish/Style
- Durability/Color
- Price/Fiber

Source: CCI & Cotton Incorporated’s Global Lifestyle Monitor
Problem: Stress in Modern Life

Modern life has brought high stress to many
DO BETTER FOR SELF

- Apparel can help ease burden of modern life

**Stress is building** for consumers across the globe

**Add performance features** so that clothing can do more for consumers

**Explore smart textiles** for stress-relieving performance

DO BETTER FOR WORLD

- Environmental Issues
- Marketing Sustainable Apparel
- Circular Fashion
Performance Features in Apparel – India

Consumers want their clothing to do more

Percent saying that the following performance features in apparel are appealing:

- Wrinkle Resistance: 87%
- Moisture Wicking: 86%
- Odor Resistant: 85%
- Sweat Hiding: 85%
- Thermal Regulating: 85%
- Durability Enhancement: 84%
- Fade Resistance: 84%
- Water Repellant: 84%

Source: Cotton Incorporated’s Global Lifestyle Monitor
Stress-Relieving Performance

Consumers are attracted to smart textiles that address physical symptoms of stress

Percent saying they are likely to purchase clothing with the following features:

- Relieve Stress: 76% (India), 53% (U.S.)
- Manage Mood/Emotions: 76% (India), 37% (U.S.)
- Monitor Heart Rate: 75% (India), 49% (U.S.)
- Monitor Perspiration: 75% (India), 34% (U.S.)
- Monitor Hydration: 74% (India), 49% (U.S.)
- Alert for Incorrect Movement: 73% (India), 44% (U.S.)

Source: CCI & Cotton Incorporated’s Global Lifestyle Monitor Survey and Cotton Incorporated’s Lifestyle Monitor™ Survey
Environmental Issues Affect Daily Life

Consumers in developing markets are especially concerned with environmental change.
Common Sustainable Actions

Consumers take various actions to improve environmental conditions in India

- Limit water usage at home (92%)
- Use my own bags while shopping (89%)
- Purchase appliances that conserve energy (88%)
- Use refillable water bottle (87%)
- Recycle cans, bottles, paper, etc. (85%)
- Purchase locally made products (84%)
- Buy clothing made from natural materials (83%)
- Recycle clothing or textiles (81%)

Source: CCI & Cotton Incorporated's Global Environment Survey 2017
Perceptions of Safety and Sustainability - Global

Consumers rate cotton the safest and most sustainably produced fiber

- Cotton: 83%
- Wool: 79%
- Rayon: 41%
- Nylon: 39%
- Polyester: 38%
- Modal: 37%
- Tencel: 26%

Source: CCI & Cotton Incorporated’s Global Environment Research 2017
Circular Fashion

Commitment to a more sustainable future
Indian consumers blame the industry if an apparel item is not environmentally friendly.

Source: CCI & Cotton Incorporated’s Global Lifestyle Monitor Survey 2018
CONSUMER ATTITUDE TOWARDS COTTON
Cotton Preferences

Thinking About The Current Clothing Fashions, What One Fiber/Material Do You Think Is Best Suited For Those Fashions?
What one fiber or material would you prefer for the clothing in your wardrobe that you wear the most?

Cotton Best Suited for Today's Fashions
- 2014: 77%
- 2016: 78%
- 2018: 77%

Cotton Most Preferred Fiber
- 2014: 81%
- 2016: 80%
- 2018: 81%
Consumers Prefer Cotton Home Textiles

What do you most prefer the following items to be made of?
Pay more for clothing made from

Would you pay more money for clothing made from natural or synthetic fibers? Why would you pay or have you paid more for clothes made from natural fibers such as cotton?

Why Pay More for NATURAL fibers Such as COTTON?

<table>
<thead>
<tr>
<th>Why Pay More</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>More comfortable</td>
<td>60%</td>
</tr>
<tr>
<td>Better quality</td>
<td>58%</td>
</tr>
<tr>
<td>More durable</td>
<td>40%</td>
</tr>
<tr>
<td>Hypoallergenic</td>
<td>36%</td>
</tr>
<tr>
<td>Better performance</td>
<td>34%</td>
</tr>
<tr>
<td>Environmentally-friendly</td>
<td>30%</td>
</tr>
<tr>
<td>Fashionable</td>
<td>21%</td>
</tr>
</tbody>
</table>

Would you pay more money for clothing made from...

- Natural: 52%
- Synthetic: 10%
- Neither: 38%
Cotton Preferences (In India)

Thinking About The Current Clothing Fashions, What One Fiber/Material Do You Think Is Best Suited For Those Fashions?
What one fiber or material would you prefer for the clothing in your wardrobe that you wear the most?

Cotton Best Suited for Today's Fashions
Cotton Most Preferred Fiber
Cotton continues to be most widely known fabrics

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cotton</td>
<td>92</td>
<td>93</td>
<td>91</td>
<td>93</td>
</tr>
<tr>
<td>Silk</td>
<td>44</td>
<td>53</td>
<td>56</td>
<td>50</td>
</tr>
<tr>
<td>Polyester</td>
<td>44</td>
<td>59</td>
<td>42</td>
<td>48</td>
</tr>
<tr>
<td>Khadi</td>
<td>36</td>
<td>43</td>
<td>38</td>
<td>36</td>
</tr>
<tr>
<td>Nylon</td>
<td>40</td>
<td>36</td>
<td>35</td>
<td>36</td>
</tr>
<tr>
<td>Denim/... Blend Cotton</td>
<td>29</td>
<td>42</td>
<td>43</td>
<td>47</td>
</tr>
<tr>
<td>Velvet</td>
<td>18</td>
<td>16</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Linen</td>
<td>15</td>
<td>17</td>
<td>16</td>
<td>15</td>
</tr>
</tbody>
</table>

Unaided Aware

Total Aware

Change more than 3% are highlighted

CONSUMERS FIND COTTON MORE COMFORTABLE W.R.T FALL/ DRAPE AS COMPARED TO COTTON BLEND

<table>
<thead>
<tr>
<th>Fabric</th>
<th>Occasion</th>
<th>Season</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall / drape of the fabric's comfortable (73%)</td>
<td>Good for in-home use (74%)</td>
<td>Suitable for Summer (76%)</td>
</tr>
<tr>
<td>Look / sheen of the fabric's Good (28%)</td>
<td>Good for formal wear/for work (31%)</td>
<td>Suitable for all types of weather (27%)</td>
</tr>
<tr>
<td>Durable (29%)</td>
<td>Good for parties/weddings, etc (30%)</td>
<td>Suitable for all types of weather (29%)</td>
</tr>
<tr>
<td>Look / sheen of the fabric's Good (20%)</td>
<td>Good for parties/weddings, etc (18%)</td>
<td>Suitable for all types of weather (18%)</td>
</tr>
<tr>
<td>Look / sheen of the fabric's Good (26%)</td>
<td>Good for parties/weddings, etc (34%)</td>
<td>Suitable for all types of weather (22%)</td>
</tr>
<tr>
<td>Look / sheen of the fabric's Good (20%)</td>
<td>Good for parties/weddings, etc (20%)</td>
<td>Suitable for all types of weather (18%)</td>
</tr>
<tr>
<td>Look / sheen of the fabric's Good (25%)</td>
<td>Good for parties/weddings, etc (33%)</td>
<td>Suitable for all types of weather (23%)</td>
</tr>
<tr>
<td>Fabric that can stretch (22%)</td>
<td>Good for parties/weddings, etc (13%)</td>
<td>Suitable for winter (36%)</td>
</tr>
</tbody>
</table>
COTTON REMAINS TO BE ONE OF THE MOST VERSATILE FABRIC ➔ VAST VARIETY AVAILABLE

<table>
<thead>
<tr>
<th>Range</th>
<th>Brand &amp; Price</th>
<th>Wash Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cotton</td>
<td>Available in a variety of colour /designs /prints (72%)</td>
<td>Branded (69%)</td>
</tr>
<tr>
<td>Cotton Blend</td>
<td>Available in a variety of colour /designs /prints (30%)</td>
<td>Branded (26%)</td>
</tr>
<tr>
<td>Denim/Jeans</td>
<td>Available in a variety of colour /designs /prints (28%)</td>
<td>Branded (29%)</td>
</tr>
<tr>
<td>Lycra / Spandex</td>
<td>Available in a variety of colour /designs /prints (19%)</td>
<td>High Priced (15%)</td>
</tr>
<tr>
<td>Polyester</td>
<td>Available in a variety of colour /designs /prints (27%)</td>
<td>Branded (19%)</td>
</tr>
<tr>
<td>Rayon</td>
<td>Available in a variety of colour /designs /prints (20%)</td>
<td>High Priced (15%)</td>
</tr>
<tr>
<td>Silk</td>
<td>Available in a variety of colour /designs /prints (26%)</td>
<td>High Priced (23%)</td>
</tr>
<tr>
<td>Wool</td>
<td>Available in a variety of colour /designs /prints (13%)</td>
<td>Branded (10%)</td>
</tr>
</tbody>
</table>

Base: 3131 (2018)
## APPAREL & HOME TEXTILES

### IMPORTANT ATTRIBUTES

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Color</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Durability</td>
<td>71</td>
<td>73</td>
<td>65</td>
<td>66</td>
</tr>
<tr>
<td>Finishing (such as hems, seams)</td>
<td>69</td>
<td>66</td>
<td>65</td>
<td>66</td>
</tr>
<tr>
<td>Type of Fabric/Cloth</td>
<td>69</td>
<td>68</td>
<td>64</td>
<td>65</td>
</tr>
<tr>
<td>Styling</td>
<td>69</td>
<td>68</td>
<td>65</td>
<td>63</td>
</tr>
<tr>
<td>Brand</td>
<td>69</td>
<td>68</td>
<td>64</td>
<td>63</td>
</tr>
<tr>
<td>Washing instructions</td>
<td>53</td>
<td>53</td>
<td>50</td>
<td>48</td>
</tr>
<tr>
<td>Seal or certification/ Guarantee of Quality</td>
<td>53</td>
<td>53</td>
<td>50</td>
<td>48</td>
</tr>
</tbody>
</table>

### Level of importance remains largely same for top 4 attributes


Change more than 3% are highlighted

Figs in %
One of emerging triggers for purchasing apparels and home textiles are gifting occasions

<table>
<thead>
<tr>
<th>Apparel</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>During festivals</td>
<td>59</td>
<td>50</td>
<td>64</td>
</tr>
<tr>
<td>For special occasions</td>
<td>46</td>
<td>39</td>
<td>51</td>
</tr>
<tr>
<td>When my clothes have begun to look old and worn out</td>
<td>50</td>
<td>46</td>
<td>54</td>
</tr>
<tr>
<td>Whenever the new season begins</td>
<td>31</td>
<td>30</td>
<td>37</td>
</tr>
<tr>
<td>When I want to give a gift to someone</td>
<td>24</td>
<td>30</td>
<td>36</td>
</tr>
<tr>
<td>When there is a sale /discount on</td>
<td>31</td>
<td>27</td>
<td>34</td>
</tr>
<tr>
<td>When the latest range of clothes is launched by stores</td>
<td>31</td>
<td>27</td>
<td>34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Textiles</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>During festivals</td>
<td>44</td>
<td>45</td>
<td>56</td>
</tr>
<tr>
<td>For special occasions</td>
<td>42</td>
<td>39</td>
<td>49</td>
</tr>
<tr>
<td>When my home textiles have begun to look old and worn out</td>
<td>39</td>
<td>47</td>
<td>44</td>
</tr>
<tr>
<td>When I want to give a gift to someone</td>
<td>39</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>When there is a sale /discount on</td>
<td>37</td>
<td>40</td>
<td>26</td>
</tr>
<tr>
<td>Whenever the new season begins (Summer/Winter)</td>
<td>33</td>
<td>30</td>
<td>24</td>
</tr>
<tr>
<td>When I am re-decorating my house</td>
<td>31</td>
<td>37</td>
<td>34</td>
</tr>
</tbody>
</table>

Change more than 3% are highlighted
<table>
<thead>
<tr>
<th>ITEM</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>jeans</td>
<td>59</td>
<td>48</td>
<td>54</td>
<td>52</td>
</tr>
<tr>
<td>undergarments</td>
<td>64</td>
<td>47</td>
<td>54</td>
<td>41</td>
</tr>
<tr>
<td>casual shirts including T-shirts,...</td>
<td>52</td>
<td>48</td>
<td>53</td>
<td>42</td>
</tr>
<tr>
<td>socks</td>
<td>37</td>
<td>33</td>
<td>36</td>
<td>31</td>
</tr>
<tr>
<td>formal/office trousers/pants</td>
<td>39</td>
<td>36</td>
<td>37</td>
<td>31</td>
</tr>
<tr>
<td>casual trousers /pants</td>
<td>35</td>
<td>35</td>
<td>36</td>
<td>28</td>
</tr>
<tr>
<td>formal/office shirts</td>
<td>40</td>
<td>36</td>
<td>34</td>
<td>36</td>
</tr>
<tr>
<td>sleepwear</td>
<td>39</td>
<td>40</td>
<td>28</td>
<td>23</td>
</tr>
<tr>
<td>salwar kameez / churidaar kurta</td>
<td>35</td>
<td>36</td>
<td>27</td>
<td>26</td>
</tr>
<tr>
<td>sarees</td>
<td>34</td>
<td>28</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>dupatta for salwar kameez</td>
<td>33</td>
<td>29</td>
<td>25</td>
<td>22</td>
</tr>
<tr>
<td>men's formal suit</td>
<td>31</td>
<td>29</td>
<td>27</td>
<td>20</td>
</tr>
<tr>
<td>traditional clothing</td>
<td>26</td>
<td>29</td>
<td>23</td>
<td>20</td>
</tr>
<tr>
<td>blazers / coats / jackets</td>
<td>31</td>
<td>27</td>
<td>28</td>
<td>22</td>
</tr>
<tr>
<td>skirts/dresses</td>
<td>25</td>
<td>14</td>
<td>20</td>
<td>14</td>
</tr>
</tbody>
</table>

Change more than 3% are highlighted

Figs in %
COTTON FABRIC GETS HIGHER CONSIDERATION IN CASE OF FORMAL SHIRTS AND BLAZERS

### FIBER CONTENT - 2018

<table>
<thead>
<tr>
<th>Category</th>
<th>2018: Predominantly Cotton</th>
<th>2018: 100% Cotton</th>
<th>2018 Top 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Socks</td>
<td>84</td>
<td>36</td>
<td>48</td>
</tr>
<tr>
<td>Undergarments</td>
<td>86</td>
<td>30</td>
<td>56</td>
</tr>
<tr>
<td>Formal/Office shirts</td>
<td>84</td>
<td>37</td>
<td>47</td>
</tr>
<tr>
<td>Casual shirts including T</td>
<td>81</td>
<td>40</td>
<td>41</td>
</tr>
<tr>
<td>Shorts</td>
<td>83</td>
<td>32</td>
<td>53</td>
</tr>
<tr>
<td>Formal/office trousers/pants</td>
<td>76</td>
<td>43</td>
<td>33</td>
</tr>
<tr>
<td>Casual trousers/pants</td>
<td>74</td>
<td>47</td>
<td>27</td>
</tr>
<tr>
<td>Jeans</td>
<td>69</td>
<td>29</td>
<td>40</td>
</tr>
<tr>
<td>Sleepwear</td>
<td>73</td>
<td>36</td>
<td>37</td>
</tr>
<tr>
<td>Traditional clothing</td>
<td>77</td>
<td>24</td>
<td>53</td>
</tr>
<tr>
<td>Men's formal suit</td>
<td>65</td>
<td>33</td>
<td>32</td>
</tr>
<tr>
<td>Blazers / coats / jackets</td>
<td>71</td>
<td>46</td>
<td>25</td>
</tr>
</tbody>
</table>

### FIBER CONTENT - 2017

<table>
<thead>
<tr>
<th>Category</th>
<th>2017: Predominantly Cotton</th>
<th>2017: 100% Cotton</th>
<th>2017 Top 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Socks</td>
<td>84</td>
<td>29</td>
<td>62</td>
</tr>
<tr>
<td>Undergarments</td>
<td>90</td>
<td>40</td>
<td>70</td>
</tr>
<tr>
<td>Formal/Office shirts</td>
<td>84</td>
<td>41</td>
<td>44</td>
</tr>
<tr>
<td>Casual shirts including T</td>
<td>81</td>
<td>29</td>
<td>52</td>
</tr>
<tr>
<td>Shorts</td>
<td>81</td>
<td>44</td>
<td>34</td>
</tr>
<tr>
<td>Formal/office trousers/pants</td>
<td>78</td>
<td>45</td>
<td>31</td>
</tr>
<tr>
<td>Casual trousers/pants</td>
<td>76</td>
<td>27</td>
<td>41</td>
</tr>
<tr>
<td>Jeans</td>
<td>68</td>
<td>42</td>
<td>25</td>
</tr>
<tr>
<td>Sleepwear</td>
<td>67</td>
<td>46</td>
<td>21</td>
</tr>
<tr>
<td>Traditional clothing</td>
<td>67</td>
<td>38</td>
<td>9</td>
</tr>
<tr>
<td>Men's formal suit</td>
<td>47</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td>Blazers / coats / jackets</td>
<td>37</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WOMEN’S WEAR

FIBER CONTENT - 2018

PREFERENCE FOR COTTON INCREASES FOR SAREES AND FORMAL OFFICE WEAR

- Figs in %

- 2018: Predominantly Cotton
- 2018: 100% Cotton
- 2018 Top 2

- Socks: 2018: 68%
- Lingerie/undergarments: 2018: 68%
- Casual shirts including T: 2018: 71%
- Sleepwear/nighties: 2018: 40%
- Dupatta for salwar kameez: 2018: 40%
- Salwar Kameez / churidar kurta: 2018: 37%
- Formal/Officewear shirts: 2018: 49%
- Skirts/Dresses: 2018: 41%
- Jeans: 2018: 54%
- Blazers / coats / jackets: 2018: 29%
- Casual trousers/pants (excluding jeans): 2018: 35%
- Formal/Officewear trousers/pants (excluding jeans): 2018: 36%
- Sarees: 2018: 70%
**KID’S WEAR**

**FIBER CONTENT - 2018**

MAJOR PROPORTION OF GARMENTS HAVE 100% COTTON. SIGNIFICANT INCREASE OF COTTON IN CASE OF BLAZERS

- **Undergarments**: 17% Cotton, 83% Predominantly Cotton
- **Socks**: 16% Cotton, 84% Predominantly Cotton
- **Sleepwear/pyjamas**: 33% Cotton, 67% Predominantly Cotton
- **Shirts including polo shirts, formal shirts**: 36% Cotton, 64% Predominantly Cotton
- **T-shirts**: 27% Cotton, 73% Predominantly Cotton
- **Shorts**: 28% Cotton, 72% Predominantly Cotton
- **Dresses/frock/skirts**: 53% Cotton, 47% Predominantly Cotton
- **Trousers/pants (excluding jeans)**: 22% Cotton, 78% Predominantly Cotton
- **Jeans**: 16% Cotton, 84% Predominantly Cotton
- **Salwar Kameez/Churidaar Kurta**: 53% Cotton, 47% Predominantly Cotton
- **Blazers / coats / jackets**: 10% Cotton, 90% Predominantly Cotton

*Figs in %*

2018: Predominantly Cotton | 2018: 100% Cotton | 2018 Top 2
COTTON REGAINS IT’S IMPORTANCE AND PREFERENCE FOR HOUSEHOLD ITEMS

FIBER CONTENT - 2018

- Bedsheets: 59% Cotton, 41% 100% Cotton
- Pillow cases: 58% Cotton, 42% 100% Cotton
- Bedcovers: 57% Cotton, 43% 100% Cotton
- Tablecloths: 49% Cotton, 51% 100% Cotton
- Cushion covers: 47% Cotton, 53% 100% Cotton
- Curtains: 46% Cotton, 54% 100% Cotton
- Towels: 42% Cotton, 58% 100% Cotton
- Upholstery: 37% Cotton, 63% 100% Cotton

2018: Predominantly Cotton
2018: 100% Cotton
2018 Top 2

Figs in %
If I could spend the rest of my life in only one fiber, it would be cotton (65%)
Clothing made from cotton is higher in quality than clothing made from manmade fibers like polyester and rayon (62%)
If something looks good on me, I will wear it no matter what the fiber content is (61%)
I have noticed clothing typically made from cotton is now being made with manmade fibers like polyester and rayon (58%)
Rayon fibers like Modal, Tencel, Liva, Lyocell, etc. are natural fibers (56%)
I do not trust the information provided on fiber content labels (54%)
Polyester is made from oil (0%)

Top box scores

Base: 3133 (2018)
COTTON CONTINUES TO BE THE MOST COMFORTABLE FABRIC. ASSOCIATION OF COTTON OVER POSITIVE ASPECTS STRENGTHEN

Clothing made primarily from cotton

- Most comfortable: 71%
- Softest: 66%
- Most sustainable or environmentally: 63%
- Lasts the longest: 59%
- Most fashionable: 57%
- Most versatile (can be worn for...): 54%
- Hardest to wash: 49%
- Hardest to dry after washing: 49%
- Falls apart the most: 48%
- Pills or fizzes the most (the formation...): 42%
- Has the biggest odor issues or causes...: 41%

Clothing primarily made from polyester

- Most comfortable: 22%
- Softest: 23%
- Most sustainable or environmentally: 29%
- Lasts the longest: 32%
- Most fashionable: 30%
- Most versatile (can be worn for...): 30%
- Hardest to wash: 29%
- Hardest to dry after washing: 31%
- Falls apart the most: 36%
- Pills or fizzes the most (the formation...): 39%
- Has the biggest odor issues or causes...: 41%

Clothing primarily made from rayon fibers

- Most comfortable: 7%
- Softest: 11%
- Most sustainable or environmentally: 8%
- Lasts the longest: 10%
- Most fashionable: 13%
- Most versatile (can be worn for...): 16%
- Hardest to wash: 21%
- Hardest to dry after washing: 20%
- Falls apart the most: 16%
- Pills or fizzes the most (the formation...): 19%
- Has the biggest odor issues or causes...: 18%

Base: 3133 (2018)
## BUY CLOTHES FROM STORES THAT OFFERS THE FOLLOWINGS

<table>
<thead>
<tr>
<th>Clothing Feature</th>
<th>Figures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing made with 100% cotton</td>
<td>75</td>
</tr>
<tr>
<td>Clothing with performance technologies that made the clothing last longer</td>
<td>71</td>
</tr>
<tr>
<td>Clothing made with environmentally-friendly or sustainable materials</td>
<td>71</td>
</tr>
<tr>
<td>Clothing with performance technologies that make clothing easier to care for or launder</td>
<td>71</td>
</tr>
<tr>
<td>Clothing made with natural fibers such as cotton</td>
<td>71</td>
</tr>
<tr>
<td>Clothing with performance technologies that made the clothing look good throughout the day</td>
<td>70</td>
</tr>
<tr>
<td>Clothing with performance technologies that made the clothing more comfortable for multiple activities throughout the day</td>
<td>70</td>
</tr>
<tr>
<td>Clothing with performance technologies that help resistant the elements (such as wind or rain)</td>
<td>70</td>
</tr>
<tr>
<td>New clothing styles frequently</td>
<td>70</td>
</tr>
<tr>
<td>Education on how to care for or launder the clothing you buy</td>
<td>69</td>
</tr>
<tr>
<td>Frequent sales or promotions</td>
<td>67</td>
</tr>
<tr>
<td>Education on the benefits of the performance technologies offered in the clothing you buy</td>
<td>67</td>
</tr>
<tr>
<td>Clothing designed by a well-known designer that you couldn’t buy anywhere else</td>
<td>66</td>
</tr>
<tr>
<td>Clothing endorsed by a celebrity you like that you couldn’t buy anywhere else</td>
<td>65</td>
</tr>
</tbody>
</table>

*Base: 3133 (2018)*
COTTON STRENGTHENS IT’S POSITIVE ASSOCIATION AS VARIOUS GARMENTS ARE MORE DESIRED TO BE OF COTTON

1. Cotton continues to enjoy universal awareness with better credibility and trust over fabric quality of cotton vis-à-vis other fabrics.

2. Purchases are slowly trending to be more unplanned and one of emerging triggers for purchasing apparels and home textiles are gifting occasions.

3. Preference for exclusive brand outlets or factory outlets is gradually picking up for apparels and home textiles too.

4. Blazers/coats are observed to be most expensive garment across all segments.

5. Purchase of branded garments for kids drops. Men are brand conscious while buying Formal suits while Women in case of blazers.

6. Cotton regains its importance and preference for household items too.
Key factors for cotton to improve competitiveness

- Maintain Positive Brand, Retailer & Consumer Perceptions
- Ability to Supply the Market in Volume & Quality
- Continued Fiber, Fabric & Product Innovations
- Improved Sustainability & Sustainability Communications
To learn more about COTTON USA™
Visit us at WWW.COTTONUSA.ORG

Contact:
Peush Narang
Representative - Cotton Council International
Tel : +91-96876-45345
Email: PNarang@cotton.org

THANKS