

# 2025 Sustainable Cotton Challenge

## Third Annual Report 2021

Produced by:



# Foreword from La Rhea Pepper

## Toward a more sustainable future

I am excited to announce that 127 companies and suppliers have joined the 2025 Sustainable Cotton Challenge between its launch in 2017 and 2020. The challenge is ambitious – brands and retailers commit to sourcing 100 percent of their cotton from the most sustainable programs by the year 2025! That's right. 100 percent. In three years.

This, in turn, will deliver positive impacts by driving the adoption of best practices, thus eliminating or reducing the use of pesticides and synthetic fertilizer and improving water use and water quality as well as soil health and biodiversity.

Why? Because the [United Nations International Panel on Climate Change](#) warns that we have just eight more years – until 2030 – to halve greenhouse gas emissions in order to avoid dangerous impacts from climate change. In other words, the climate is calling, and we can't ignore it.

Forthcoming Textile Exchange data shows that billions of pounds of greenhouse gas-emitting synthetic fertilizers and millions of pounds of pesticides are applied to cotton each year in the U.S. alone. As the U.S. – the third largest cotton-producing nation – is the only country to gather such data, these findings indicate that the overall use of such inputs is far greater cumulatively.

We don't have time to change practices incrementally – we have less than eight years to make radical, systemic changes. How? By choosing to work with the list of recognized organic and sustainable cotton initiatives outlined in this report – ABRAPA, BASF e3, BCI, Cotton made in Africa (CmiA), CmiA Organic, Fair Trade, Fair Trade Organic, Organic Cotton, ISCC, MyBMP, REEL, Regenerative Organic Certified, and the U.S. Cotton Trust Protocol.

But whichever program you choose, we hope you will see it as a journey of continuous improvement to ever more stringent practices that protect and nurture people and the planet. After all, Textile Exchange's goal is that by 2025 – in just three years – more than 50 percent of the world's cotton will be converted to more sustainable growing methods.

If you have not yet joined the Sustainable Cotton Challenge, now is the time. Today. Not tomorrow.

Together, we'll make the difference.



**La Rhea Pepper**  
CEO,  
Textile Exchange

Cover image: Rita Hogan (Cotton plant, Texas, United States).

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## Time for action



We've proven a pathway to scale better cotton, now adopted by many of the world's largest brands. We enthusiastically encourage others to join the journey.

### Set a target

Commit to transitioning your cotton usage to sustainable sources, such as organic, BCI, Fairtrade, and others featured in this report. Set quantitative, time-bound targets to help track progress.

### Secure your supply

Start by mapping your suppliers, using chain of custody to make a content claim, and going beyond certification to ensure impact.

### Invest in transitional cotton

Looking for innovative ways to do great things? Invest in cotton in transition-to-organic cotton blended with your certified organic cotton.

### Diversify your sourcing

Consider a diverse approach to building your organic supply base; different regions offer different opportunities.

### Join a round table or working group

Pre-competitive, peer-to-peer and group exchanges through Textile Exchange's convening platforms is the best way to transform the industry.

### Do business differently

Look at your business model. Can you adopt natural-based accounting practices? How do you re-engineer your sourcing practices? OCA, ChetCo and OrganiMark's "cluster" programs each help brands and suppliers leverage scale they create together.

Start your journey with the [CottonUP Guide](#).

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# Welcome to the third annual report



We are excited to share the progress that 127 companies have reported toward reaching Textile Exchange's "2025 Sustainable Cotton Challenge" in 2020. The Challenge inspires retailers and brands to champion the greater use of sustainable cotton by aiming for 100 percent of the cotton in their supply chains to come from the most sustainable sources by 2025 – in just three years.

This third annual 2025 Sustainable Cotton Challenge report outlines how brands and supply chain actors are increasingly adopting sustainable cotton production practices. This has a direct impact on soil quality, biodiversity, and water quality and availability, all components of Textile Exchange's Climate+ strategy, which calls for the textile industry to achieve a 45 percent reduction in GHG emissions within fiber and raw material – read, cotton – by 2030.

Participating companies made considerable progress in 2020, with 30 percent already achieving the 100 percent sustainable cotton goal in their portfolio.

The ultimate goal of the Challenge is to urge and inspire companies to convert cotton production, moving from present-day conventional farming techniques heavily reliant on hazardous inputs toward more sustainable practices – including organic production – thus increasing the production and availability of sustainable cotton globally.

We urge all brands and supply chain actors involved in cotton production to join the 2025 Sustainable Cotton Challenge. It is not just the only such challenge bringing so many initiatives together, it's the best way to catalyze planning and ensure sustainable cotton is available to meet both consumer demand and the demands of our planet. Joining the Challenge is a great way to learn more about regional opportunities with each initiative, given that some are local while others are global.

In addition to committing to the Challenge, it is essential that brands and the supply chain work together in coordinating actions to support the growth of sustainable cotton. Working in partnership is crucial in leading cotton production into a stronger sustainable pathway.

As an industry, brands are also responsible for reporting and sharing the work they are undertaking to protect the environment. Participating in the Challenge is key to reaching that goal.

As an organization we are actively collaborating with all the initiatives. We look forward to learning from one another and to looking beyond 2025.



**Rui Fontoura**

Fiber and Materials Strategy Lead,  
Cotton and Crops,  
Textile Exchange

## About the initiatives and their work

The "heart" of the 2025 Sustainable Cotton Challenge is the Preferred Cotton initiatives. Various not-for-profit groups, academic institutions and businesses have collaborated to try to provide systems, standards, transparency, and traceability in these programs to assist all involved – from field to fabric – in making decisions. Sustainable cotton production practices and technology are constantly evolving and adaptation is critical at the farm gate. These initiatives provide education, assistance and the platforms needed to guide us all to a more sustainable cotton supply.

Textile Exchange's partnership with these initiatives aims to support the continuous improvement towards a more sustainable cotton future.

As part of this, Textile Exchange hosts a Sustainable Cotton Round Table Advisory Group, which meets on a regular basis throughout the year.



# What is the 2025 Sustainable Cotton Challenge?



## History of the Challenge

His Royal Highness The Prince of Wales established the **International Sustainability Unit (ISU)** to facilitate consensus on how to resolve some of the key environmental challenges facing the world. These challenges include halting tropical deforestation, sustaining the marine environment and exploring ways to maintain ecosystem resilience while achieving development goals. The ISU was proud to have played a part in facilitating the advances that have been made, based upon its international reputation for credible, trusted and neutral convening, underpinned by well researched and rigorous analysis, and broad consultation with key actors from governments, the private sector and civil society.

In 2017, the ISU, in collaboration with M&S and The Soil Association, brought some of the world's leading clothing companies together with a number of NGOs and standards organizations working on sustainable cotton. These meetings at Clarence House offered participants the opportunity to discuss the possible launch of a collaborative effort on scaling the use of sustainable cotton within the textile industry.

A small steering group, led by the ISU, Marks & Spencer, The Soil Association, Textile Exchange, Levi Strauss & Co., and Kering worked together to draft the Sustainable Cotton Communiqué. In May 2017, at a high-level meeting in London, the [Sustainable Cotton Communiqué](#) was launched. Thirteen of the world's most renowned clothing and textile companies, in the presence of His Royal Highness The Prince of Wales, signed up to the [2025 Sustainable Cotton Challenge](#). The Prince of Wales congratulated the companies that signed and described their commitment as “a hugely encouraging step that will hopefully spur wider action across the sector and go a long way in helping to reduce the negative environmental and social impacts that are all too often associated with cotton production.” The commitment made by these companies

equated to more than 300,000 metric tons (mt) of cotton purchased each year. The aims of the communiqué include steps to increase the uptake of organic and sustainable cotton, which will, in turn, increase the income of smallholder farmers, eliminate highly hazardous pesticides, eliminate or reduce the amount of pesticides and synthetic fertilizer used, reduce water use and improve water quality and soil health, including positive carbon impacts as a result of more sustainable practices.

In March 2018, with the closure of His Royal Highness The Prince of Wales International Sustainability Unit, it was agreed that Textile Exchange would assume the role of the initiative's Secretariat. Textile Exchange is thrilled to have this honor. Under the guidance of the Steering Committee, we will continue to build on the momentum created through this initiative, enrolling more brands to the communiqué and helping to secure a more sustainable cotton sector.

## The 2025 Sustainable Cotton Challenge

The 2025 Sustainable Cotton Challenge is a catalyst to shift the market toward the use of more sustainable cotton.

**Through this challenge, the signatories commit to sourcing 100 percent of their cotton from the most sustainable sources by 2025. As an industry, it is the vision of the 2025 Sustainable Cotton Challenge that more than 50 percent of the world's cotton is converted to more sustainable growing methods by 2025.** The progress made on sustainable cotton reveals how entire commodity sectors can make rapid progress toward sustainable outcomes, so long as the business case is clear that solutions can be found and senior level leadership is behind the process of change.



Photo credit: HRH Prince of Wales International Sustainability Unit

# How to participate



This Challenge is a catalyst to spur a shift in the market toward the use of more sustainable cotton. As stated in the original communiqué, companies will be required to independently publish their annual progress, which will be collected by Textile Exchange.

There is no cost to join and no requirement to be a member of Textile Exchange. Brands are asked to participate in the Textile Exchange's Corporate Fiber and Materials Benchmark program so we can document their collective progress.

All results are reported as aggregated data and no information is disclosed from specific brand reporting; information submitted is absolutely secure. Any inspirational stories that brands and initiatives provide in addition are purely voluntary.

If your company is interested in signing up for the 2025 Sustainable Cotton Challenge, please fill out the pledge at the bottom of the webpage at the link below. More information, including the full text of the Sustainable Cotton Communiqué, is available on the [Textile Exchange website](#).

**What are the criteria for an initiative to be a part of the 2025 Sustainable Cotton Challenge?**

All initiatives that qualify for the Challenge have clear guidelines, or standards of better or best practices. Farmers need to be specifically enrolled in the program as a long-term objective. They are then monitored by a second party or third party certified.

## The 2025 sustainable cotton initiatives

Brands and retailers joining the challenge and committing to source more sustainable cotton can choose from Textile Exchange's list of recognized organic and sustainable cotton initiatives. These initiatives include: ABRAPA, BASF e3, Better Cotton Initiative (BCI), Cleaner Cotton, Cotton made in Africa (CmiA,) Fairtrade, Fairtrade Organic, Field to Market, ISCC, myBMP, Organic Cotton, Recycled Cotton, REEL Cotton, Regenerative Cotton, Transitional Cotton, United States Cotton Trust Protocol.



Better Cotton Initiative



Cotton made in Africa



ABRAPA



BASF e3™



Cleaner Cotton



Fairtrade Cotton



Organic Cotton



Field to Market



ISCC



myBMP



Regenerative Cotton



REEL Cotton



Recycled Cotton



Transitional Cotton



U.S. Cotton Trust Protocol



2025 Sustainable Cotton Challenge

# Signatories' progress

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# 2025 Sustainable Cotton Challenge signatories in 2020



By 2020, 127 companies had signed up to the 2025 Sustainable Cotton Challenge. By signing the pledge, the companies have committed to aim for 100 percent of their cotton to come from the most sustainable sources by 2025.

2025 Sustainable Cotton Challenge signatories are a mix of brands, retailers, holding companies, and suppliers.

Textile Exchange tracks signatories' progress through the [Corporate Fiber and Materials \(CFMB\) Benchmark Program](#), where participants are required to report data through an online portal called "Probench."

In 2020, 96 of the 127 signatories reported data this way, either independently or through a combined submission made by their holding company, resulting in 50 completed survey submissions representing the 96 signatories.

From the 50 submissions, 39 completed the full "cotton module" i.e. they reported on both management as well as uptake activities, and the remaining 11 reported on uptake (consumption data) only through the "progress tracker."

All 50 participants were able to provide uptake figures, which approximated a combined 1.3 million metric tons (mt) of preferred cotton and represented 69 percent of their entire cotton use (including conventional). This figure represented 7.2 percent of global cotton produced in the same year.

The signatories that reported through the CFMB had a combined estimated turnover of USD 499,158 billion and were headquartered across 13 different countries.

## Brands/retailers:

adidas



ASOS  
discover fashion online

BOLL & BRANCH

BURBERRY  
London, England

BURTON



COYUCHI

DEDICATED.



G-STAR RAW

greenfibres

H&M



HEMTEX



INDIGENOUS  
SUSTAINABLE FASHION

INDITEX

KappAhl



KERING

Kid

KNICKEY

LEVI STRAUSS & CO.

LINDEX

M&S  
EST. 1884

MANTIS  
WORLD

MARA HOFFMAN

Mayamiko

METAWEAR

Mulberry

NATUREPEDIC

next



otto group

prAna

Reformation

Sainsbury's

SKFK



TED BAKER

10  
tentree

F&F  
THE NEW FASHION COLLECTION AT  
TESCO

THE  
VERY  
GROUP

Timberland

VARNER



WHL  
WOOLWORTHS  
HOLDINGS  
LIMITED

## Suppliers:

AmeriCo. Group

bloomsbury mill  
for little dreamers

modelmalhas  
Indústria de malhas, Lda.



UPW

WTS  
WORLD • TEXTILE • SOURCING

Orimpex, Pratibha, and World Textile Sourcing participated in the supplier pilot of the CFMB 2020.



## New signatories in 2020



We warmly welcome and congratulate the new members who signed the 2025 Sustainable Cotton Challenge in 2020:

### Brands and retailers



BOLL & BRANCH

**DEDICATED.**

Gap Inc.

**G-STAR RAW**

**INDITEX**

**STANLEY/STELLA**

STELLA/  
Mc CARTNEY



### Suppliers

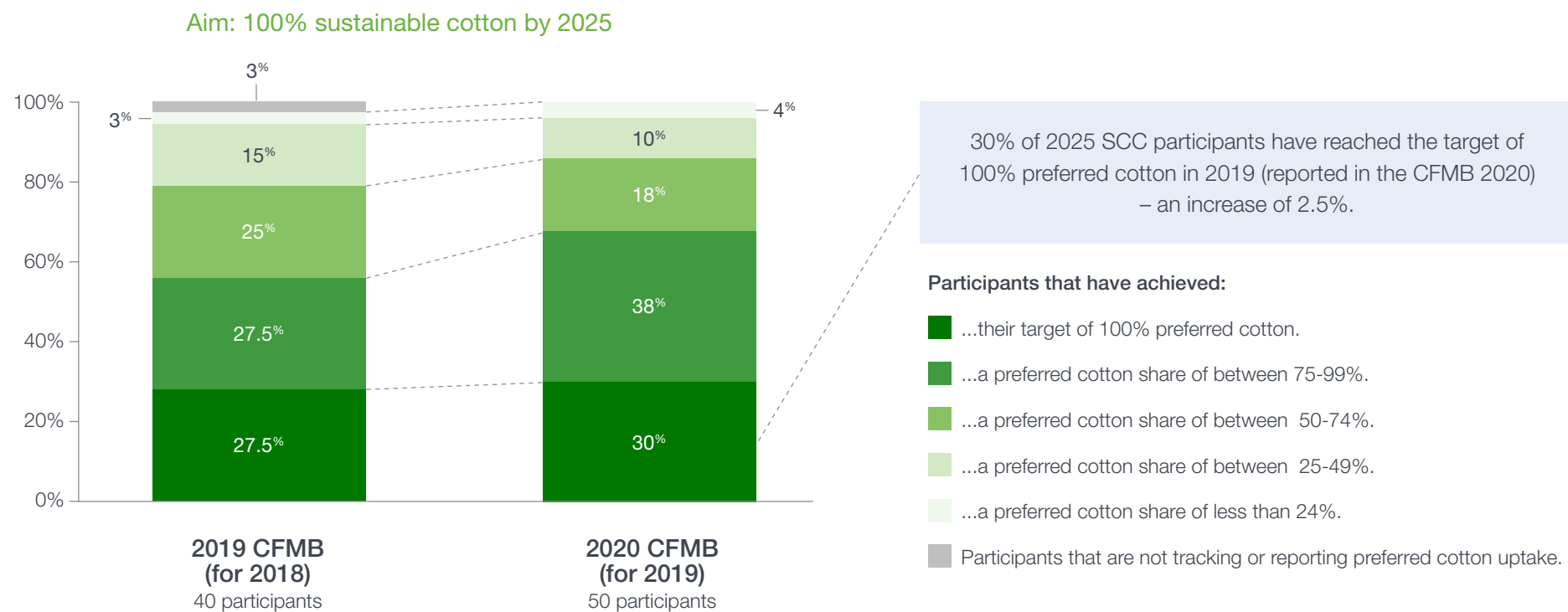
**UPW**

**WTS**  
WORLD • TEXTILE • SOURCING

# Participants progress towards 100% sustainable cotton



We are pleased to announce that the number of signatories of the 2025 Sustainable Cotton Challenge (2025 SCC) that reported progress through the Corporate Fiber and Materials Benchmark Program (CFMB) grew from 40 companies in 2019 to 50 in 2020. 30 percent of them have reached the target of 100 percent preferred cotton in 2019 (reported in the CFMB 2020). Less than 15 percent had less than half of their cotton sourced from preferred sources in 2019.

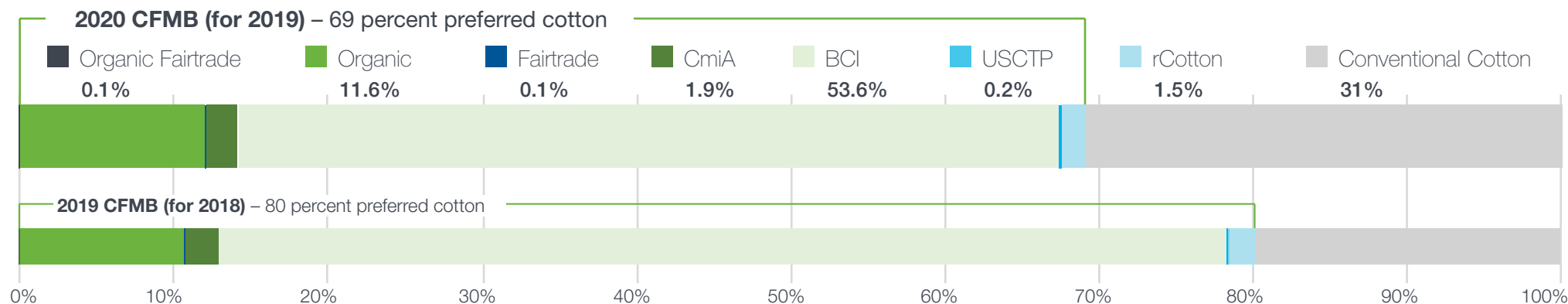


# Closing the gap

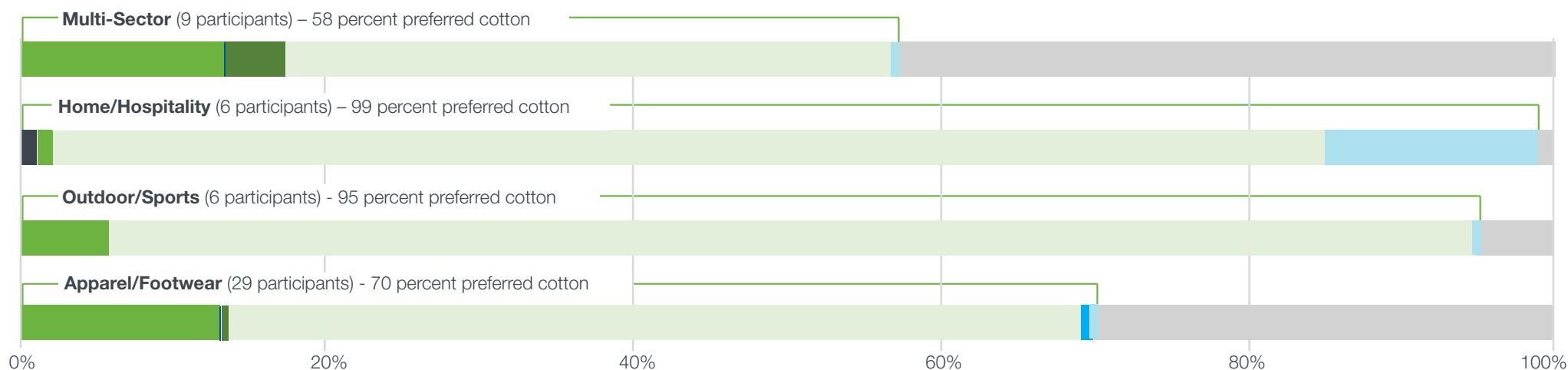


The reported use of preferred versus conventional cotton by the 2025 Sustainable Cotton Challenge participants:

In the 2020 CFMB (for 2019), based on the absolute volume of preferred cotton reported, the overall mix of preferred to conventional was: 69 percent preferred and 31 percent conventional. Compared to the year before, the percentage is lower as initial signatories were leaders with higher average shares of preferred cotton and new signatories have lower preferred cotton shares.



## Sub-sector analysis





# A wider perspective of preferred cotton



Preferred cotton reporting has been steadily increasing over the past three years, with 116 of the 120 benchmark entrants reporting uptake for cotton in 2020. Of the 116, 43 percent (50) are 2025 Sustainable Cotton Challenge participants. The 2020 entrants reported a combined use of eight different preferred cotton programs from the 16 options available to signatories (i.e. cotton grown to specific sustainability standards and other initiatives).

The most commonly reported preferred cotton was organic (85 percent participants), followed by BCI (47 percent), and, in third place, recycled cotton (38 percent). By quantity, BCI is by far the highest volume reported.

There have been substantial gains made over the past few years in scaling the uptake of more sustainable forms of cotton, which is now higher than ever at over 1,603,449 mt in 2019 (reported in the CFMB 2020). **The sustainable cotton uptake volume reported through the CFMB 2020 equals about 25 percent of the global sustainable cotton production<sup>(1)</sup>.**

In order for sustainable cotton to become standard business practice, the amount of sustainable cotton grown and bought must increase significantly. The 2025 Sustainable Cotton Challenge sends a signal to millions of producers that there is a real demand for a more sustainable approach to cotton production that reduces the environmental and social costs.

The companies that have pledged their support are at various stages on their journey to using sustainable cotton, with some already securing all of their cotton from sustainable sources. However, all are clear that collaboration across the sector is needed to bring about transformative change.

## CFMB preferred cotton uptake

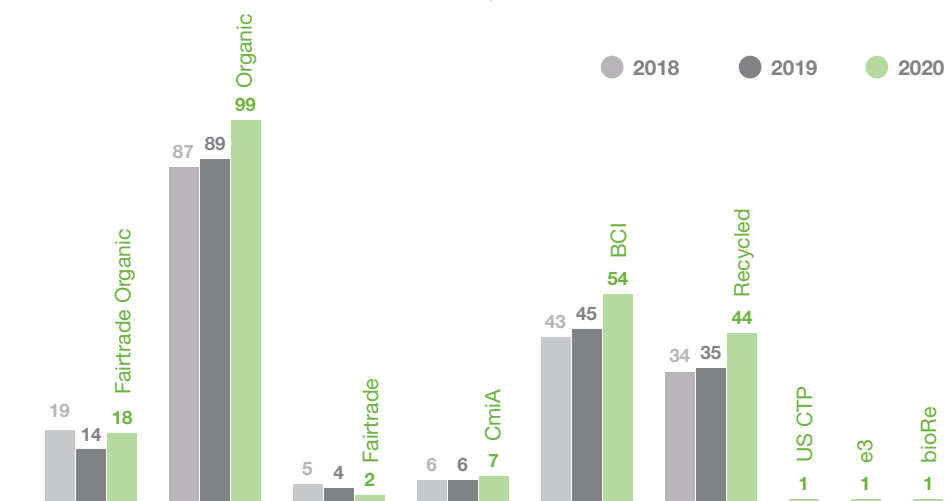


**2020 CFMB**  
(for 2019):  
**1,603,449 mt**

**2019 CFMB**  
(for 2018):  
**1,353,380 mt**

**2018 CFMB**  
(for 2017):  
**940,533 mt**

## Number of companies



## CFMB 2020 outcomes



**1,485,311 ha**  
Land under improved or  
organic management

**69%**

Preferred cotton was  
reported consumed vs.  
31% conventional cotton

(1). Textile Exchange (production data: PFMR 2020, estimated consumption data: CFMB 2020)

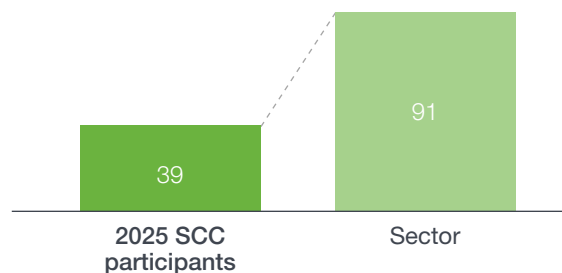
# Comparison of signatories vs all participants



The following charts show the 2025 SCC participants' performance versus the non-signatory participants in the Corporate Fiber and Material Benchmark Program in 2020.

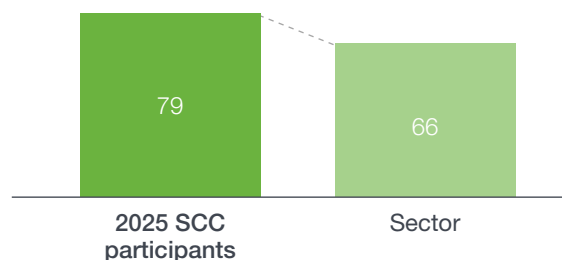
## Number of participants for cotton module

2025 SCC participants make up 43% of all the companies that completed the CFMB2020 cotton module



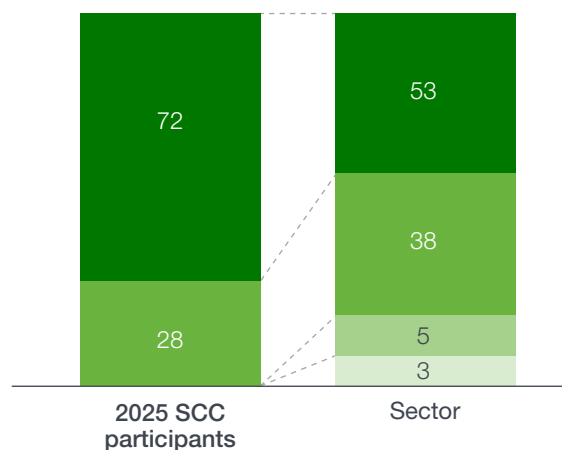
## Average scores for cotton module

On average, 2025 SCC participants scored 13 points higher than the sector for the CFMB cotton module.



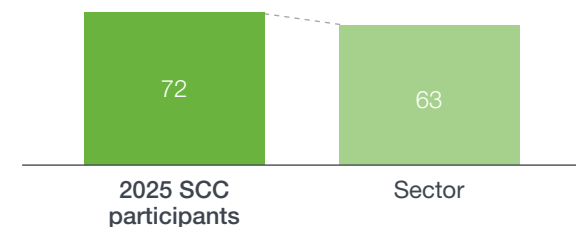
## Performance distribution of cotton module

The majority (72%) of the 2025 SCC participants are in the "Leading" performance band. The remaining are performing at "Maturing" performance band.

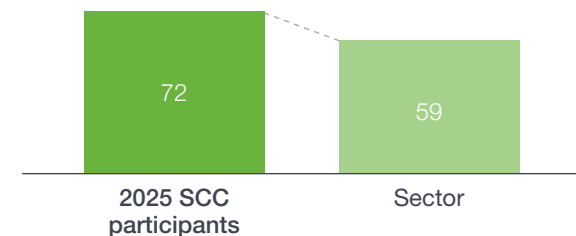


## Management score for cotton module

The 2025 SCC participants are performing above the sector average at incorporating sustainability practices into their cotton operations.

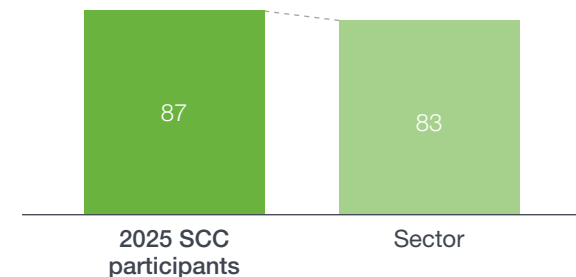


## Relative uptake score for cotton module



## Absolute uptake score for cotton module

At a score of 87, the 2025 SCC participants are also reporting higher absolute volumetric uptake compared to the sector average.



	Risk Management	Investment	Transparency	Targets	Uptake	Impact
2025 SCC Participants	Maturing	Maturing	Maturing	Leading	Leading	Establishing
Sector	Establishing	Maturing	Establishing	Leading	Leading	Establishing

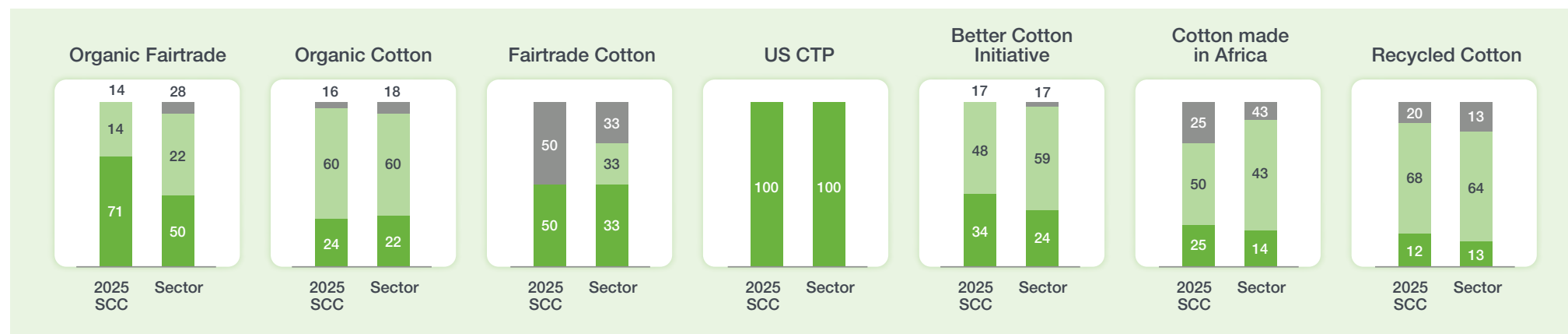
# Comparison of signatories vs all participants



## Adoption of verification models in cotton programs

2025 SCC shows higher coverage of verification across the majority of the cotton programs used.

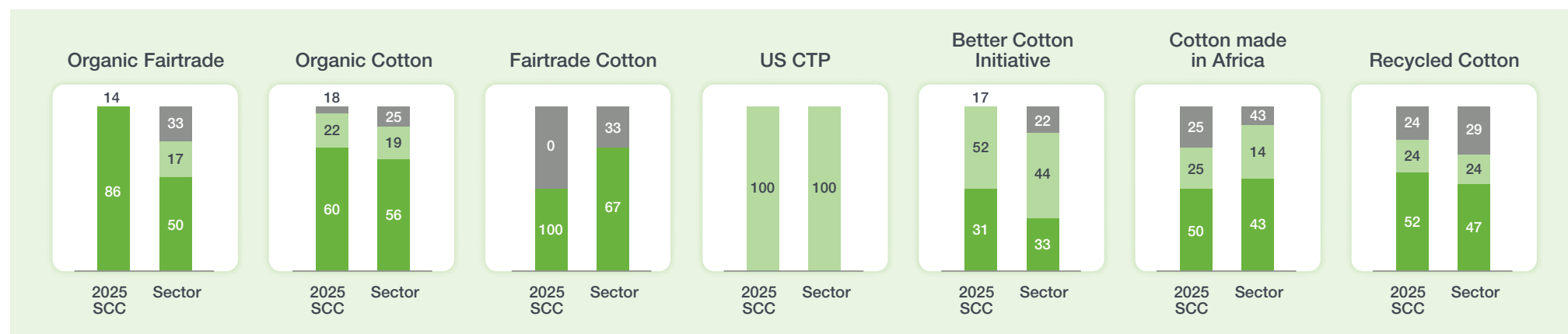
■ Full coverage ■ Partial coverage ■ No response in CFMB



## Labeling of cotton products

In general, 2025 SCC product labeling practices are above that of the sector.

■ Yes ■ No ■ No response in CFMB







2025 Sustainable Cotton Challenge

# Global progress

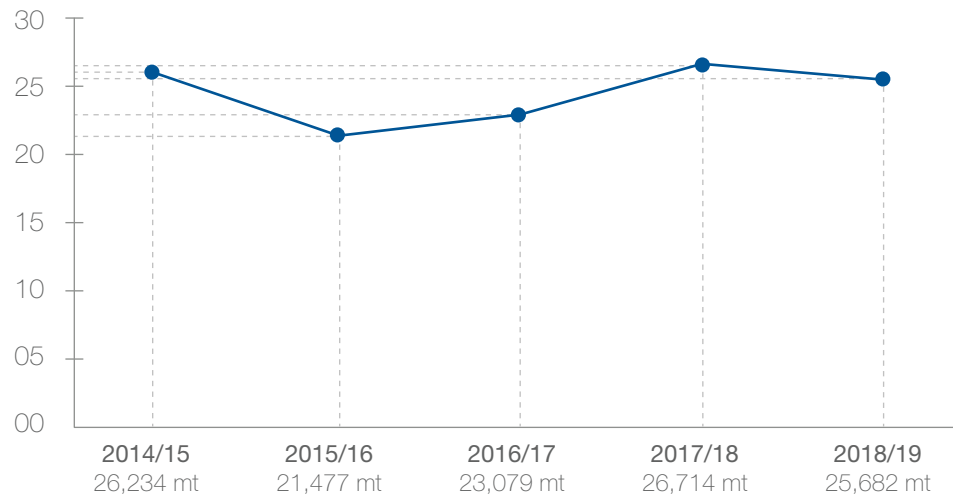
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# Global cotton production <sup>(1)</sup>

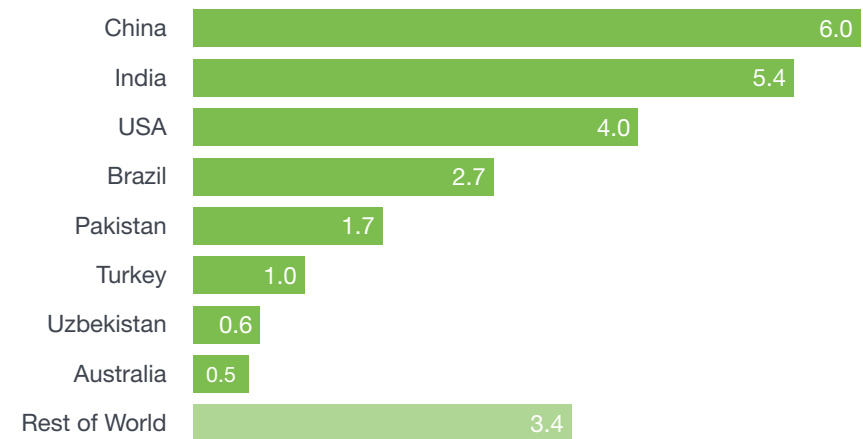


Cotton is the second highest volume fiber since synthetics took the lead in the mid-1990s. With a production volume of 25.68 million mt in 2018/19, cotton had a market share of 23.3 percent of the global fiber production.<sup>(2)</sup>

Global cotton production trend  
(<sup>'000</sup> mt)



Global cotton production breakdown 2018/19  
(million mt)



Cotton is grown in around  
**64 countries** on approximately  
**33 million hectares**  
= 2 percent of global arable land.

The average cotton fiber  
yield is **778 kg/ha**.  
Yields range from  
**130-2,088 kg/ha**.

Total global cotton fiber  
production was  
**25.68 million mt** in 2018/19.

Cotton farms range from highly  
industrialized in more developed  
economies to small-scale  
family farmers in the developing  
southern hemisphere.

(1) ICAC - World Cotton World Statistics May 2020. Received by mail.

(2) Textile Exchange Preferred Fiber and Materials Report 2020. [Link](#).

- Note that 2018/19 data is given as percent of 2019 calendar year data total fiber production.

# Global preferred cotton production <sup>(1)</sup>

With a market share of 25 percent in 2018/19, the market for preferred cotton is more advanced than for most other materials.

Key drivers are the existence of several well-established preferred cotton programs and that cotton as a large volume material has been on the industry's sustainability radar for many years.

The market share of preferred virgin cotton increased from five percent of the total cotton production in 2012/13 to 25 percent in 2018/19. This growth equals an increase in global production volume of preferred cotton from 1.4 million mt in 2012/13 to 6.4 million mt in 2018/19<sup>(3)</sup>.

Preferred virgin cotton includes ABRAPA, BASF e3, Better Cotton Initiative (BCI), Cleaner Cotton, Cotton made in Africa (CmiA), Fairtrade, Fairtrade Organic, Field to Market\*, In-Conversion Cotton (Transitional in USA)\*, ISCC, myBMP, Organic, REEL Cotton, Regenerative Cotton\*, and the United States Cotton Trust Protocol\*. The preferred cotton options included here align with all virgin cotton options included in the 2025 Sustainable Cotton Challenge (see more on page "[Commitments to Preferred Cotton](#)")<sup>(1)</sup>.

(1) These figures do not include recycled cotton. Please see the chapter "[Recycled Cotton](#)" for more information on recycled cotton. They also do not yet contain any data from the United States Cotton Trust Protocol, an initiative added to the Sustainable Cotton Challenge 2025 in spring 2020, nor for Field to Market (not yet harvested in 2018/19), Regenerative or In-Conversion Cotton (no global data available), Regenerative Organic Certification (ROC), and QAI's Certified Transitional Cotton production has not yet started in 2018/19.

Preferred cotton initiatives exist within a continuum, and Textile Exchange sees regenerative organic cotton production systems operating under Fair Trade principles as the "gold standard." To learn more about the specific programs, check out the Textile Exchange [Sustainable Cotton Matrix](#).

All BCI cotton, including its equivalents ABRAPA, CmiA and myBMP, made up around 22 percent of all cotton in 2018/19 and, thus, the large majority of the 25 percent of preferred cotton in 2018/19. The BCI Standard, without equivalents, accounted for around 11 percent, the Brazilian standard ABRAPA for around 8 percent, CmiA for around 2 percent, and MyBMP for below 1 percent of all cotton in 2018/19<sup>(5)</sup>. BCI aims to increase its market share to 30 percent of the global cotton production by 2020.

All other cotton programs together, including BASF e3, Cleaner Cotton, Fair Trade, ISCC, Organic<sup>(4)</sup>, and REEL cotton, had a combined market share of below 3 percent of all cotton in 2018/19.

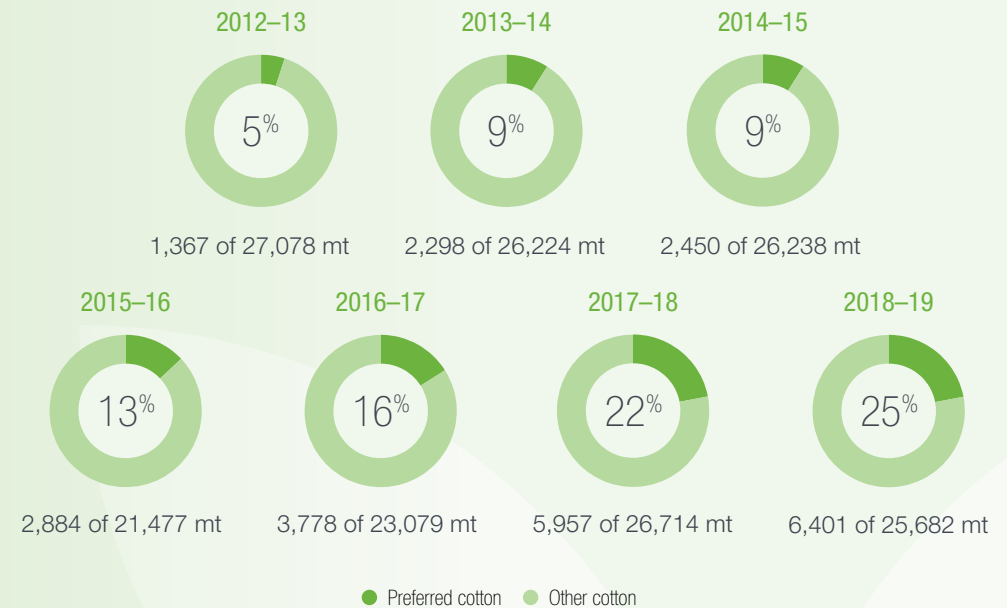
(2) ICAC-Cotton: World Statistics May 2020 and Textile Exchange compilation of total global fiber volume data (see "[Global Fiber Market](#)").

(3) ICAC-Cotton: World Statistics 2020, standard owner data received by mail or from their publications; compilation by Textile Exchange - overlaps of standards excluded.

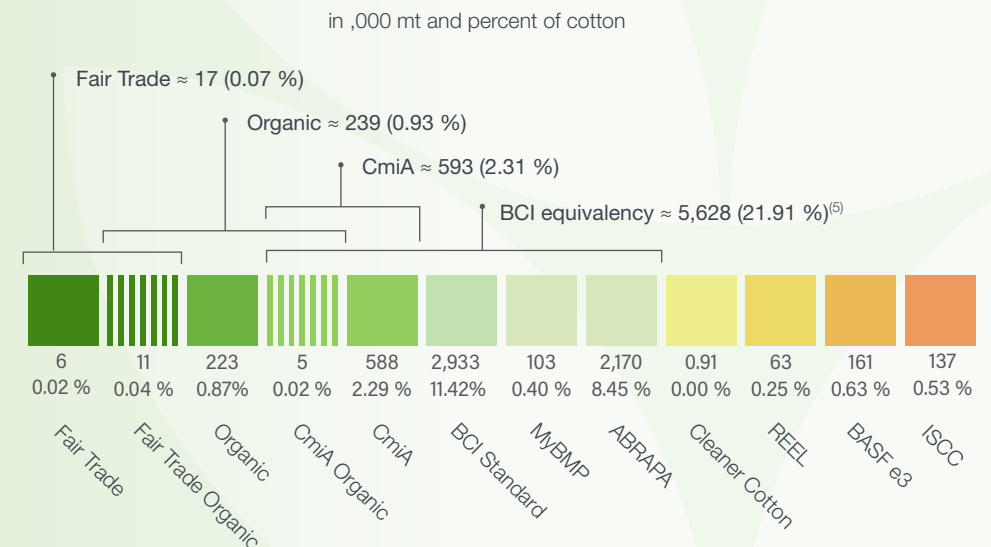
(4) This includes organic cotton certified to bioRe.

(5) The BCI equivalency as reported by BCI. It slightly differs from the aggregated of the data provided by the individual initiatives because minor parts of their volumes are not accounted as BCI equivalency and due to somewhat differing data collection and reporting methodology.

## MARKET SHARE OF PREFERRED COTTON ('000)



## PREFERRED COTTON FIBER PRODUCTION IN 2018-19 6.4 million MT



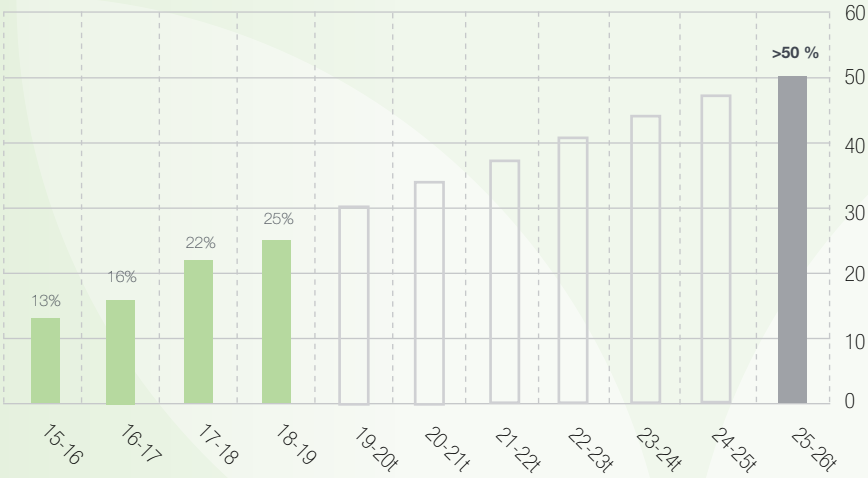


# Industry's progress towards 50% sustainable cotton by 2025

The vision of the [2025 Sustainable Cotton Challenge](#) is that **more than 50 percent of the world's cotton in 2025<sup>(1)</sup>** is converted to more sustainable growing methods.

In 2018/19, 25 percent of the world's cotton was covered by preferred cotton programs.

PROGRESS TOWARDS THE 2025 SUSTAINABLE COTTON CHALLENGE TARGET  
(% OF SUSTAINABLE COTTON)



(1) These initiatives include \*ABRAPA, \*BASF e3, Better Cotton Initiative (BCI), \*Cleaner Cotton, Cotton made in Africa (CmiA), Fairtrade, \*Fairtrade Organic, \*Field to Market, \*In-Conversion Cotton (Transitional in the USA), \*ISCC, \*myBMP, Organic, Recycled cotton (that is certified to an independently verifiable standard such as the Global Recycled Standard or the Recycled Claim Standard), \*REEL Cotton, \*Regenerative Cotton, and the \*\*United States Cotton Trust Protocol. \*Initiatives added in 2019, \*\*Initiatives added in 2020.

# Progress of the preferred cotton initiatives <sup>(1)</sup>

## ABRAPA's Responsible Brazilian Cotton/ Algodão Brasileiro Responsável (ABR)

production increased from 753,608 mt in 2012/13 to around 2.17 million mt in 2018/19. This volume equaled a market share of 8.45 percent of all cotton grown in 2018/19. Approximately 93 percent of all ABRAPA cotton was accounted for as BCI in 2018/19.

The **BASF e3** cotton production was around 160,754 mt in 2018/19 equaling 0.63 percent of all cotton produced in 2018/19.

**Better Cotton Initiative (BCI)** cotton production including equivalents increased from 665,789 mt in 2012/13 to 5.628 million mt in 2018/19. The BCI Standard made up around 52 percent of all BCI cotton produced in 2018/19. The remaining 48 percent of BCI cotton was produced according to the BCI equivalents ABRAPA, Cotton made in Africa and myBMP. BCI, including equivalents, represented around 22 percent of all cotton production in 2018/19.

**Cleaner Cotton** production increased from 258 mt in 2012/13 to 914 mt in 2018/19. This equaled 0.004 percent of all cotton produced in 2018/19. In March 2019, the funding for the regular farm program ended. However, the formerly enrolled growers

continue to produce cotton according to previously established practices but without the project's support. Educational work, such as the annual cotton farm tours, will be continued, and Cleaner Cotton™ fiber will still be available upon request.

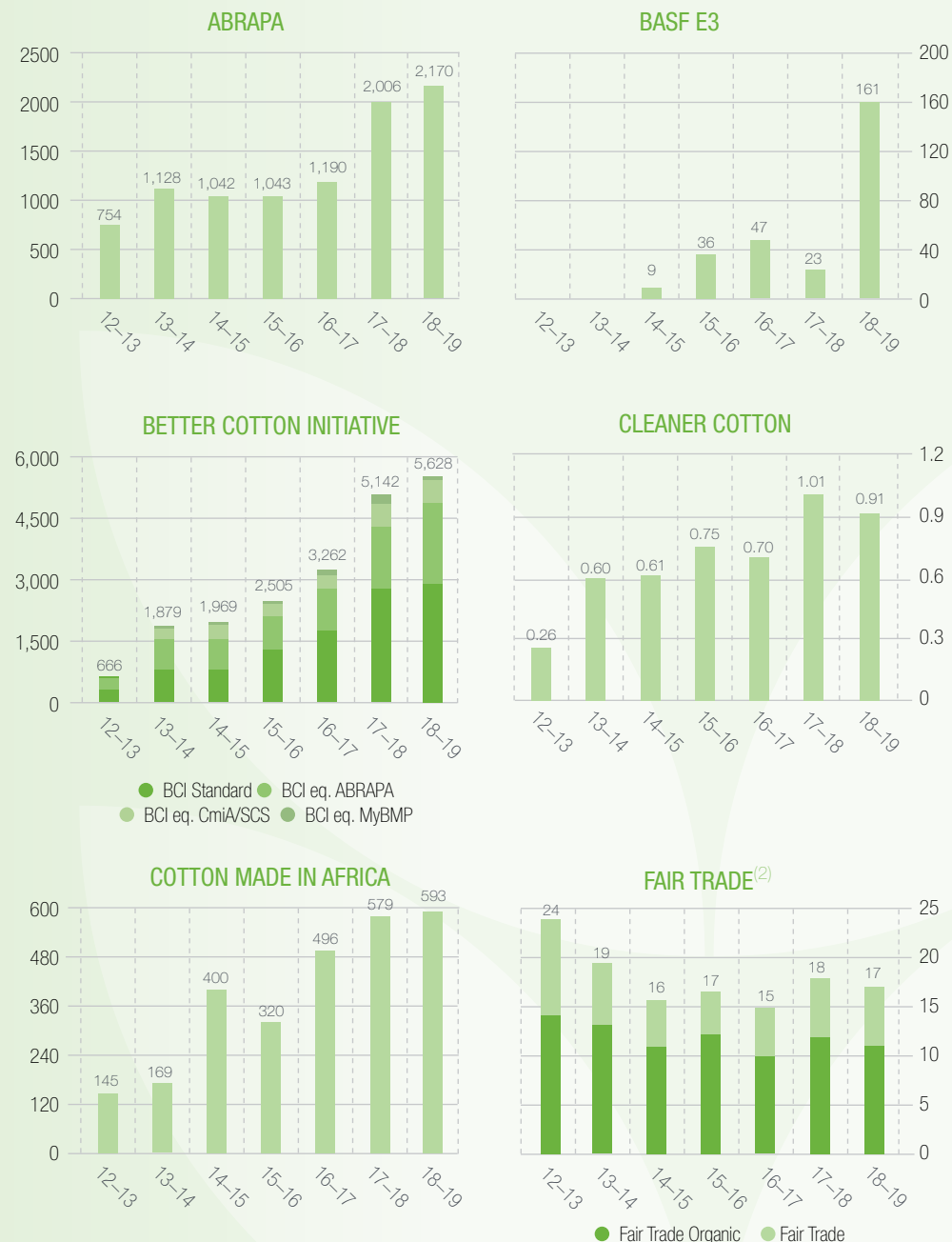
**Cotton made in Africa (CmiA)** production increased from 144,909 mt in 2012/13 to 593,067 mt in 2018/19. This equaled 2.31 percent of all cotton produced in 2018/19 and more than 30 percent of all cotton production in Africa in 2018/19. Almost all (97 percent) of the CmiA produced in 2018/19 was also accounted for as BCI equivalent. With 5,420 mt, a large part of the CmiA cotton produced in Tanzania was also certified organic.

**Fairtrade** cotton production reached 16,906 mt in 2018/19 equaling 0.07 percent of all cotton produced in 2018/19<sup>(2)</sup>.

**Fairtrade Organic** cotton production, i.e. the production of cotton that is certified to both, Fairtrade and an organic standard, was around 10,989 mt in 2018/19.

Approximately 65 percent of all Fairtrade cotton in 2018/19 was also certified to an organic standard<sup>(2)</sup>.

The production volume of preferred cotton is growing (in '000 metric tons).



(1) The data are based on information from the standard owners which we have received through email correspondence or from their websites. The production volumes reported here include the total volume produced per standard including equivalents and overlaps with other standards.

(2) The allocation of Fairtrade cotton data, collected by calendar year, to ICAC harvest year has been adjusted. More details in the chapter on [Data Revisions](#).

# Progress of the preferred cotton initiatives <sup>(1)</sup>

**Field to Market** certified cotton was not yet produced in 2018/19.

**ISCC** cotton production increased from 108,575 mt in 2017/18 to 137,052 mt in 2018/19. This amount equaled 0.53 percent of all cotton produced in 2018/19<sup>(2)</sup>.

**myBMP** cotton production increased from 54,000 mt in 2013/14 to 102,721 mt in 2018/19 equalling equaled 0.40 percent of all cotton produced in 2018/19. myBMP is also accounted as BCI equivalent.

**Organic cotton** production increased from 107,243 mt in 2012/13 to 239,797 mt in 2018/19. Organic cotton equaled a market share of 0.93 percent of all cotton produced in 2018/19. The organic cotton production volume includes the organic cotton that is certified according to bioRe. For more information on organic cotton please see our [Organic Cotton Market Report 2020](#).

**REEL** cotton production has fluctuated over the past few years and increased to 63,326 mt in 2018/19. This amount equaled 0.25 percent of all cotton produced in 2018/19.

**Regenerative Cotton** certified according to the Regenerative Organic Certification (ROC) was not yet produced in 2018/19.

**In-Conversion Cotton (Transitional in the USA)** is the cotton-in-conversion to organic. 55,833 ha of land were in-conversion in 2018/19. For more details, please have a look at the forthcoming [Organic Cotton Market Report 2020](#). Several certifiers have in-conversion programs. Branded In-Conversion Cotton is still very rare. **QAI's Certified Transitional** Program, launched in 2016 to recognize and incentivize farmers to transition their land from conventional to organic growing methods, is an example of a program offering such branding. As the initial focus was on food crops, no QAI Certified Transitional cotton was produced in 2018/19 yet.

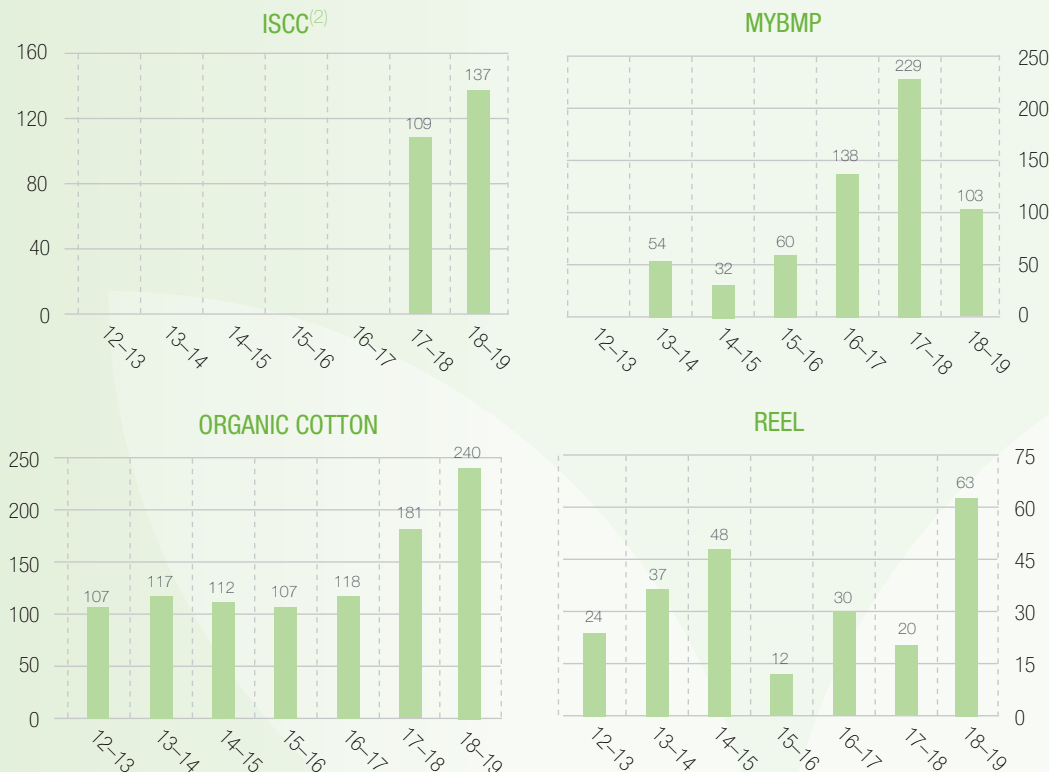
**Tip: How to find out more about the different cotton programs.**

To learn more about the specific programs, what they cover, and how they differ, check out the Textile Exchange [Sustainable Cotton Matrix](#).

(1) The data are based on information from the standard owners which we have received through email correspondence or from their websites. The production volumes reported here include the total volume produced per standard, including equivalents and overlaps with other standards.

(2) ISCC cotton volumes are collected by calendar year, not ICAC harvest year. The data from the 2019 calendar year have been allocated to the 2018/19 ICAC harvest year, the 2018 calendar year data to the 2017/18 ICAC harvest year.

The production volume of preferred cotton is growing (in '000 metric tons).



## Key milestones

- |             |                                                                  |             |                                                                             |
|-------------|------------------------------------------------------------------|-------------|-----------------------------------------------------------------------------|
| <b>1996</b> | <b>IFOAM</b> set first international organic standard            | <b>2010</b> | <b>CottonConnect's REEL</b> cotton program started                          |
| <b>1996</b> | <b>Sustainable Cotton Project (SCP) / Cleaner Cotton</b> founded | <b>2010</b> | <b>ISCC</b> started                                                         |
| <b>1997</b> | <b>MyBMP</b> founded                                             | <b>2013</b> | <b>Field to Market</b> launched                                             |
| <b>2004</b> | <b>Fairtrade</b> standard for seed cotton established            | <b>2013</b> | <b>Bayer CropScience's e3</b> cotton program (now <b>BASF e3</b> ) launched |
| <b>2005</b> | <b>BCI</b> founded                                               | <b>2016</b> | <b>QAI's Certified Transitional</b> Program launched                        |
| <b>2005</b> | <b>Cotton made in Africa (CmiA)</b> founded                      | <b>2018</b> | <b>Regenerative Organic Certified (ROC)</b> launched                        |
| <b>2009</b> | <b>ABRAPA's</b> sustainability program started                   | <b>2019</b> | <b>U.S. Cotton Trust Protocol</b> started                                   |



# Directory: Where to find preferred cotton across the globe<sup>(1)</sup>

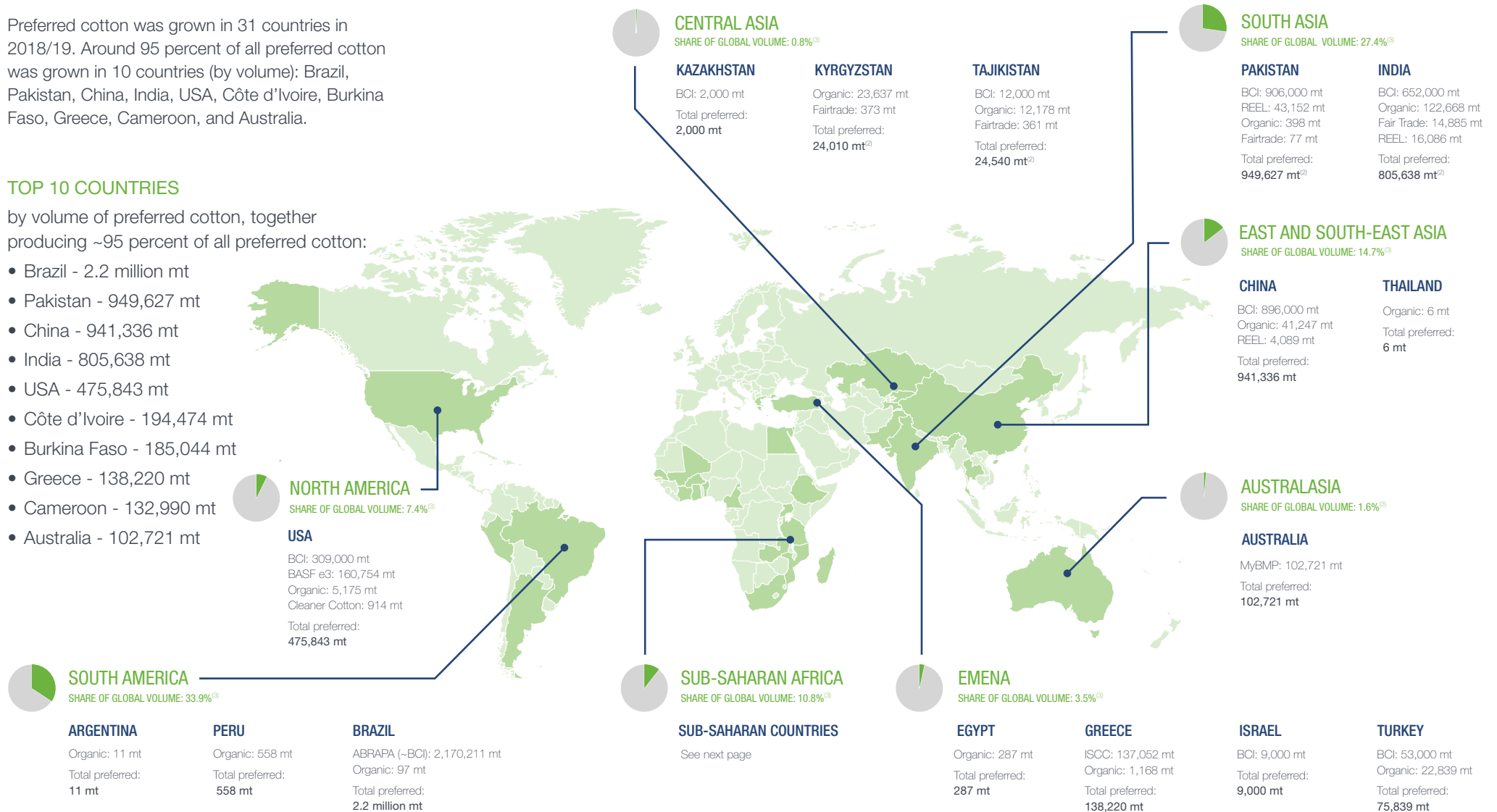


Preferred cotton was grown in 31 countries in 2018/19. Around 95 percent of all preferred cotton was grown in 10 countries (by volume): Brazil, Pakistan, China, India, USA, Côte d'Ivoire, Burkina Faso, Greece, Cameroon, and Australia.

## TOP 10 COUNTRIES

by volume of preferred cotton, together producing ~95 percent of all preferred cotton:

- Brazil - 2.2 million mt
- Pakistan - 949,627 mt
- China - 941,336 mt
- India - 805,638 mt
- USA - 475,843 mt
- Côte d'Ivoire - 194,474 mt
- Burkina Faso - 185,044 mt
- Greece - 138,220 mt
- Cameroon - 132,990 mt
- Australia - 102,721 mt



(1) Email correspondence with cotton initiatives; BCI refers here to BCI standard; BCI equivalents are listed separately.

(2) As the per-country breakdown of Fairtrade Organic cotton was not available to the report production team at the launch of the report, this figure may include cotton that is certified to both Fairtrade and organic. Thus a double-counting of this figure is possible. The total volume of preferred cotton per country would not change much, though, as the share of Fairtrade Organic cotton compared to the total amount of preferred cotton is rather low.

(3) Preferred cotton production volume in this region as share (%) of the total global preferred cotton production volume.

# Preferred cotton directory: Spotlight on Sub-Saharan Africa <sup>(1)</sup>

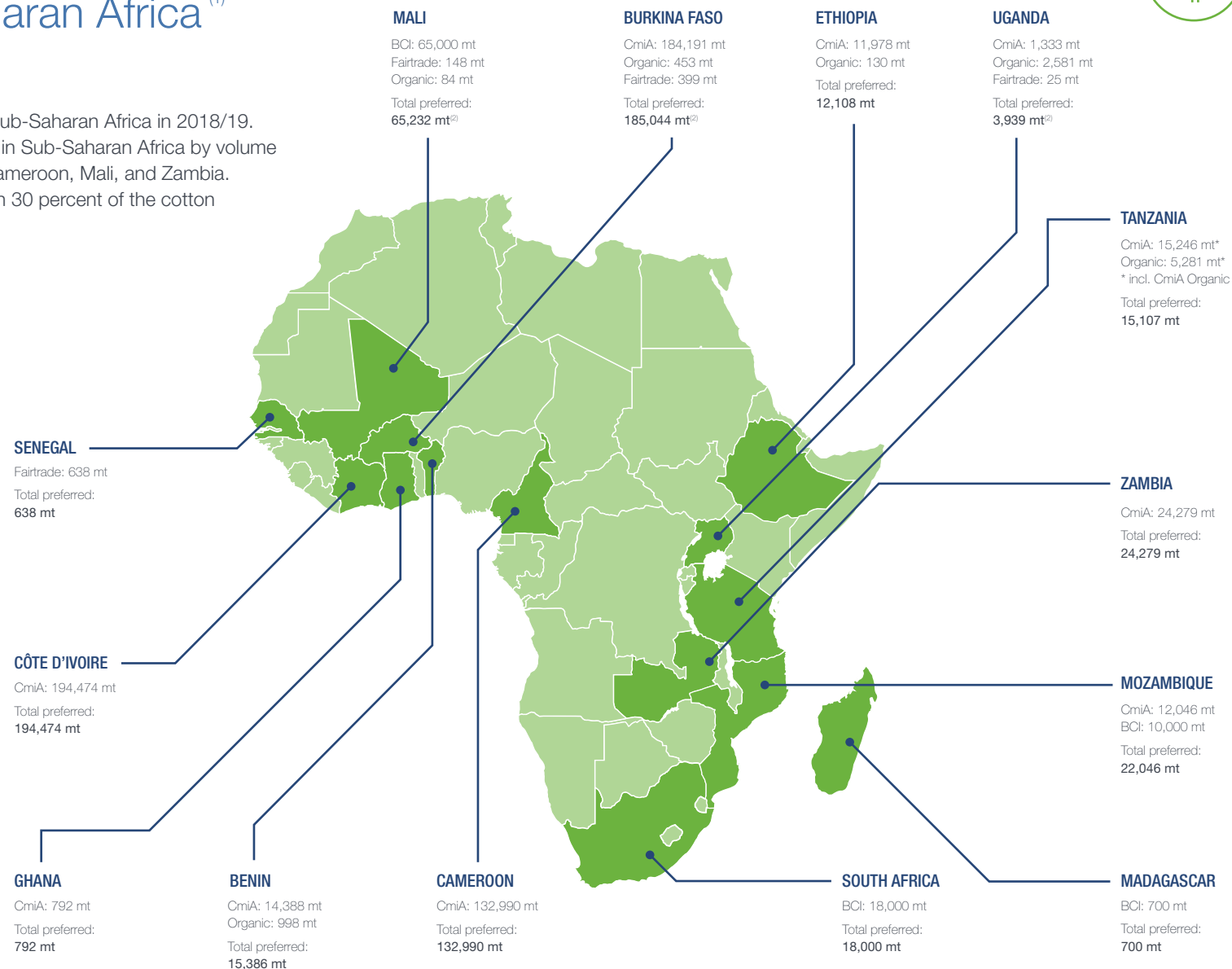


Preferred cotton was grown in 14 countries in Sub-Saharan Africa in 2018/19. The top 5 preferred cotton-producing countries in Sub-Saharan Africa by volume in 2019/18 were Côte d'Ivoire, Burkina Faso, Cameroon, Mali, and Zambia. Cotton made in Africa (CmiA) certified more than 30 percent of the cotton production in Africa in 2018/19.

## TOP 5 SUB-SAHARAN COUNTRIES

by volume of preferred cotton:

- Côte d'Ivoire - 194,474 mt
- Burkina Faso - 185,044 mt
- Cameroon - 132,990 mt
- Mali - 65,232 mt
- Zambia - 24,279 mt



(1) Email correspondence with cotton initiatives; BCI refers here to BCI standard; BCI equivalents are listed separately.

(2) As the per-country breakdown of Fairtrade Organic cotton was not available to the report production team at the launch of the report, this figure may include cotton that is certified to both Fairtrade and organic. Thus a double-counting of this figure is possible. The total volume of preferred cotton per country would not change much, though, as the share of Fairtrade Organic cotton compared to the total amount of preferred cotton is rather low.



2025 Sustainable Cotton Challenge

# Insider stories

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# CottonConnect: Listening to women's voices on the effects of climate change



The latest report in CottonConnect's Women in Cotton series, "Listening to Women's Voices on the Effects of Climate Change," discusses the effects of climate change on the lives of female cotton farmers, as told by women in India and Pakistan.

Fashion and textile manufacturers are being urged to incorporate climate change mitigation into their rebuild strategies. According to a recent McKinsey report, the global fashion industry produced around 2.1 billion tonnes of greenhouse gas emissions in 2018 (4 percent of the global total), with 38 percent of those emissions coming from energy-intensive raw material production.

In order to understand the impact of climate change on women in cotton farming, CottonConnect conducted focus group discussions and in-depth interviews with local implementing partners in India and Pakistan.

The findings from this study illustrate that climate change affects all areas of women's lives – on the farm, caring for livestock, and in the home. In turn, this has a profound impact on their income, time, and health.

## Key Findings

Women are working longer hours on the farm due to increased sowing, weeding, and other farm activities needed.

The productivity of livestock has decreased, yet the cost and time required to take care of animals has increased.

Women face a dual blow of increased work but reduced income, affecting the social and economic gains from cotton farming.

The increased burden of work in the field and at home affects physical and mental health and increases time poverty.

## Three key impacts of climate change on women cotton farmers

**Reduced income:** The loss of productivity in livestock impacts women's income the most, as this income is primarily theirs. Women and local partners shared that any reduction in contribution to household expenditure reduces women's decision-making powers in the family.

**Reduced time:** The increased time spent looking after the farm, livestock, and family means the women now have very little time for themselves or to socialize. Many women who previously earned money by doing craftwork such as embroidery or running a small business no longer have time to do this.

**Reduced health and wellbeing:** With the rise in temperature and humidity, and weather extremes, women are more vulnerable to infectious diseases, allergy, and heat exhaustion. The group discussions identified that women's health and nutritional needs can be placed last by both herself and her family.

There is clearly a human cost attributable to climate change, as well as an environmental cost. Keeping women front and center in climate change mitigation strategies is a fundamental part of building resilient supply chains.

Alison Ward, CEO of CottonConnect, said, "It's evident that for women in cotton farming communities, climate change is a current issue, not a future issue. Now is the time for fashion and textile brands, and organizations working directly with cotton farming communities, to help build climate-resilient communities, for example, through gender-specific training to adapt to the changed climate cycle."

For more information and recommendations: ["Women in Cotton: Listening to Women's Voices on the Effects of Climate Change."](#)

*Source: CottonConnect*



Photo: Cotton Connect



# Coyuchi: Updates from a pioneer



2020 was a year of unprecedented challenges. COVID-19 and continued instability driven by climate impacts were stark reminders of our interconnectedness, our values and the important work ahead.

For those who have been following Coyuchi's 2025 SCC updates, you are by now aware that we were the first to bring organic cotton bedding to the United States almost 30 years ago. But what may be less familiar is the tie to Chetna from the very beginning. Coyuchi has always sourced a portion of its fiber from Chetna Organic and ensuring positive impact through new products and categories has been an ongoing goal of our team.

In 2020, we continued to expand our product assortment across categories with increased demand as people stayed home. In addition to programs in bedding and bath, our knit loungewear and apparel collections, Arroyo Organic and Solstice Organic, use 100 percent certified organic Fair Trade fiber sourced from Chetna, contributing to the economic security needed for the longevity of these communities.

In the fall of 2020, we proudly launched the Full Circle Recycled Cotton Blanket and Throw, which was a blend of cotton recycled exclusively from Coyuchi product and virgin

organic cotton. We hope this will be the first of many products that allows us to take what can't be repaired and renewed as part of our 2nd Home program and use our materials to the fullest. We see recycling as one of many necessary pieces of our material mix and to our circular initiative overall and will continue to innovate in this area.

For many, 2020 was a time to reevaluate and recenter and, for us, we continued to evolve how we work at home.

This year marked the convening of a multi-stakeholder coalition centered on cotton grown in our home state of CA. Brought together by our partners Fibershed and White Buffalo Land Trust, like-minded consultancies Materevolve and Torus, and with research led by Chico State University, we are working pre-competitively to purchase cotton directly from a farm that is involved in a multi-year research study on soil health and carbon sequestration.

Projects like this allow us to go further and test new ways of working that are necessary to address what's at the heart of the 2025 challenge and beyond.

*Source: Margot Lyons, Production Sustainability Manager, Coyuchi*



Photo: Coyuchi

# Inditex: Scaling organic cotton in India



Inditex recently launched an organic cotton procurement financing pilot project with the farming community in India to help scale the country's organic cotton production. This initiative was launched in collaboration with international banks such as DBS Bank Ltd and Standard Chartered, alongside the local Non-Banking Financial Company (NBFC) Samunnati Financial Intermediation Ltd and with the specialist support of the NGO Action for Social Advancement (ASA). The aim is to leverage India's growing network of local Farmer Producer Organizations (FPOs) to reach more than 2,000 farmers with improved access to finance, quality inputs, and know-how to support the transition to more sustainable practices.

While India is a major producer of organic cotton, it still only makes up 2 percent of the country's total cotton production volume. Scaling these volumes is made difficult by the fact that India's farming community is highly fragmented, with more than five million farmers scattered across nine states. Most of these farmers are small producers who lack the financial means or the necessary knowledge to implement sustainable practices.

Through this project, both international banks are providing accessible finance to these FPOs through Samunnati – a finance

company in the agricultural domain – to support farmers led by ASA, providing organic cotton expertise and promoting capacity-building among farmers.

Cotton spinners within Inditex's supply chain are the main buyers of the cotton. This structure means farmers receive a premium over the market price, helping to grow their profits. In addition, through securing higher volumes of their produce, farmers get greater visibility of their cash flow to better plan their business needs. In turn, this helps grow their sustainable farming operations through increased productivity and production volumes.

Transparency is also a key benefit of the program, with a clear chain of custody from farmer to spinner and beyond. Tracking and testing procedures provide Inditex with the quality assurance and visibility that the cotton has been farmed according to sustainable practices.

The initiative forms part of Inditex's roadmap to sustainability. As part of this, the Inditex Group has a target for 100% of its cotton to be more sustainable in 2023 and is working alongside several global initiatives to drive the sustainability of the cotton industry.

*Source: Inditex*



Photo: Rui Fontoura



# Piping Hot: Transitioning to recycled cotton is a priority



Piping Hot is born from the ocean – the Australian surf brand began with first-to-market wetsuit fabrications that transformed the way that surfers could move in cold-water climates, extending the season and keeping people connected to the ocean on a daily basis.

We have become acutely aware that the lifestyle that we love is under threat from plastic pollution, global warming, and the climate crisis. This has made our team more motivated than ever to keep people connected to oceans and to proactively contribute to protecting them.

As part of our ocean protection mission, we have implemented a business-wide approach to sustainability. In July 2021, we will achieve a key milestone, with 100 percent of our products made with preferred fibers that are recycled, recyclable, renewable, or biodegradable.

We have been ambitious with our targets, implementing circular design principles to reduce waste and energy. We have also prioritized fiber and production techniques that have the lowest water use and greatest opportunity for responsible water stewardship.

As a staple for our T-shirts and sweats, cotton makes up more than half of our overall fiber portfolio and has therefore been critical to address. It is one of the more water-dependent fibers, with a significant

environmental footprint. The significant use of pesticides is also an issue. Piping Hot is concerned about many of these toxic chemicals filtering into our waterways and oceans, causing widespread health issues for both communities and marine life.

Our decision to stop procuring conventional cotton and move to more sustainable options, including BCI cotton and recycled cotton, is based on a thorough analysis of water intake, pesticides, and waste output during the cotton production process.

Since 2019, we have saved 79.6 million liters of water by using more sustainable cotton, as calculated by Better Cotton Initiative (BCI). We are proud to be a member of BCI, a sustainable cotton program educating farmers to produce cotton more efficiently.

We want to continue to reduce the environmental impact of our cotton sourcing and have developed quality recycled cotton fabrications that we will introduce into our product offering in 2021. Recycled cotton is particularly exciting because it has the lowest water use of any cotton. Developing a suitable substitute for conventional cotton was challenging. We had to work closely with our suppliers to develop a recycled cotton blend that would meet our stringent quality and strength tests. The environmental benefits are impressive – 1,080 liters of water can be saved with just one recycled cotton T-shirt (using data from the Water Footprint Network



Photo: Piping Hot Australia

and WWF). That's the equivalent of 337.5 days of drinking water for a human (based on World Health Organization reports). This is why we've made transitioning to recycled cotton a priority at Piping Hot.

We are proud members of the Textile Exchange and participate in the Corporate Fiber and Materials Benchmark as well as the Sustainable Cotton Challenge.

*Source: Kelly Elkin, Sustainability Manager, Piping Hot Australia*

# Reverse Resources: Championing effective textile recycling



## Current market scenario

Since its inception, Reverse Resources (RR) has been intently focusing on investigating market barriers and best use cases of post-industrial waste streams. Our extensive research and on-ground work (across Europe, Asia, and parts of North Africa) have helped us develop a thorough understanding of textile waste generation, the factors that determine their further treatment, the value they garner from the recycling industry, and most importantly, the obstacles in the way of effective recycling.

We have learned that today's scaled recycling technologies are able to valorize only a limited variety of fabric compositions, such as 100% cotton and cotton-rich blends. 100% cotton especially is the most sought after. We observed that because of this high demand, access to high-quality 100% cotton is a mammoth challenge for recyclers. Although there is a significant volume of cotton waste that gets generated, sourcing the required type and high quality of raw materials at affordable prices is extremely difficult for recyclers. The recyclers are struggling with irregular access to feedstock, lack of background information regarding the sourced material, and high prices. All these factors eventually translate into high price points of recycled yarns. Evidently, these market inefficiencies need addressing.

## RR's interventions to drive circular economy

Through our research, it became very apparent to us that while there are large volumes of waste that get generated, they largely remain uncaptured and therefore do not get reintroduced into the supply chain. The main obstacle for this is the lack of accurate and verified data with regards to different types of waste streams that get generated and could be made available for sale. And so, we set out to develop our current Software-as-a-Service platform that enables collection of accurate and relevant data and digital steering, and tracing of waste from source to recycling.

But the RR interventions go beyond our platform. We believe that to facilitate the implementation of verified circular supply chains, interventions need to start at the very source, which, in this case, is the textile and garment manufacturers. The waste mapping surveys that we conducted as part of our research, including 1,200+ factories from 20 countries, have provided evidence that approximately 80 percent of textile production waste is currently unsegregated. So, RR works with factories to demonstrate what waste is recyclable and then train their staff on standard operating procedures (SOPs) when handling this waste. The SOPs aid the factories in easy segregation, labeling,



Photo: Reverse Resources

and inventory management of their textile waste. These SOPs have compounded benefits: 1) the inherent value of the waste generated remains intact (ergo keeping their recyclability intact), 2) mitigates contamination risk, and 3) procures higher selling value for manufacturing facilities (their incentive to incorporate said SOPs).

In addition, textile waste primarily flows through the informal waste-handling market (often present in many apparel-producing countries). We have many examples of

high-value cotton waste being incinerated and landfilled because there is no efficient waste collection system. The textile waste, in fact, changes hands between three to five middlemen before reaching recycling; hence it is imperative that supply chains be shortened. For this, RR works with formal waste handling companies that can double up as aggregating agents, quality check, and warehouse partners. This way, the multiple roles that were earlier serviced by different middlemen get reassigned and limited to one or two waste handlers.



# Reverse Resources: Championing effective textile recycling



Finally, through our add-on services, we match and direct textile waste to our recycling partners as per their desired requirements. We follow the movement of this textile waste along the entire supply chain by collecting data, via our online platform, at every point in this supply chain. This comprehensive approach therefore enables us to: 1) mitigate existing market barriers, 2) connect the supply and demand of textile waste, 3) track and trace the movement of textile waste, and 4) scale recycling and circular supply chains.

## International projects

### *United Nations Industrial Organization (UNIDO) SwitchMed Programme (MED TEST III)*

Over the past decade, UNIDO has built local capacities of industries in the Southern Mediterranean region to use resources more efficiently and to deliver products with a better environmental footprint through the MED TEST I and II projects. Through the MED TEST III project (launched in the second half of 2019), UNIDO aims to promote circular value chains and better chemical practices for a greener and more competitive textile industry in Egypt, Morocco, and Tunisia.

For this project, UNIDO enlisted international brands and expert organizations such as RR and Blumine SRL to engage national stakeholders in the development of circular value chains. Ones that can ascribe value to post-industrial and pre-consumer textile

waste and move the textile industries toward adopting safer chemical protocols. With the focus countries being Egypt, Morocco, and Tunisia, we have observed that about half of the waste streams generated are 100 percent cotton and cotton-rich fabrics. Through the research conducted and implementation of future pilots, we envision the project to offer roadmaps to each of the countries in consideration for textile waste valorization.

### *Circular Fashion Partnership (CFP)*

Set in Bangladesh, the CFP is a project developed in collaboration with Global Fashion Agenda (GFA), Bangladesh Garment Manufacturers and Exporters Association (BGMEA), P4G (Partnerships for Green Growth), and RR. Given that Bangladesh produces arguably the most recyclable waste (a significant portion of which is cotton-rich fabrics) of any apparel-producing country, it is aptly poised to reduce its dependency on virgin raw materials. Recycling the 100 percent cotton waste could save Bangladesh half a billion USD on cotton imports.

The project seeks to tap into this opportunity and accordingly: 1) map the textile waste being generated, 2) recapture and reintroduce this waste into the supply chain, and 3) scale the local recycling capacity. Launched in October 2020, CFP now has 20 international retail brands (and their respective supply chain partners) and over 20 international recyclers as participants.



## RR mission and way forward

Reverse Resources is an impact-driven company with a fundamental mission to reduce the industry's dependency on our planet's finite natural resources. The RR platform has proved to be an extremely critical tool to expedite brands' (and their respective supply chains') transition to circularity. Even the market interventions enabled by RR have been crucial to ensure not just recyclers' control over affordable high-quality feedstock but also to increase the percentage of 100 percent cotton and cotton-rich textile waste that reaches the recycling stage. As more

recycling technologies emerge, we will support these companies in securing other waste compositions as well. And the work done for the 100 percent cotton and cotton-rich textile waste could be further scaled to include other waste streams, thereby paving the way for a truly sustainable and circular economy.

### *Sources:*

*Ann Runnel, CEO and Founder*  
*Nin Castle, Co-Founder and Chief Program Officer*  
*Harshitha Venati, Program Manager*



# WTS: Your solution for sustainable fibers



To be truly sustainable, we begin at the start of the supply chain and the cultivation of fibers. WTS proudly offers a sustainable product strategy that includes organic, renewable, and recycled fibers in an effort to achieve circularity and a closed-loop production cycle. WTS is committed to sustainability and traceability at every level of the supply chain and maintains ethical production practices throughout the entire manufacturing process.

Peru, known for the world's finest cotton, produces 85 percent of the organic cotton in Latin America. WTS is invested in organic cotton in partnership with Bergman/Rivera. WTS also partners with our suppliers and clients to promote the use of cotton in conversion, which incentivizes and enables farmers to transform their land and adopt sustainable farming methods. Supporting these sustainability initiatives encourages farmers to regenerate their soil without being burdened by the financial risk and lower yields experienced during the transitional period. It also provides supplementary supply to fill the demand for organic cotton. WTS is committed to working with farmers in Peru as they toil to regenerate the earth.

WTS has joined the U.S. Cotton Trust Protocol®, which sets new standards for more sustainably grown cotton. Aligned

with the U.N. Sustainability Goals, the Trust Protocol brings quantifiable and verifiable goals and measurements to sustainable cotton production and drives continuous improvement in six key sustainability metrics: land use, soil carbon, water management, soil loss, greenhouse gas emissions, and energy efficiency.

To ultimately help brands achieve their sustainability goals, WTS participates in various collaborative initiatives with other industry experts. WTS is a proud member of Textile Exchange and BCI (Better Cotton Initiative) and is one of a few supplier signatories of the 2025 Sustainable Cotton Challenge, which encourages industry leaders to source 100 percent of their cotton from the most sustainable inputs by the year 2025. Brands and suppliers joining the challenge can choose from Textile Exchange's organic and preferred cotton alternatives. The company is supporting Textile Exchange's Preferred Fiber and Materials Benchmark program to document our progress.

Find more information at [wts.com.pe](https://wts.com.pe)

*Source: Elayne Masterson, VP Sales and Business Development, WTS*



Photo: Trisha Downing



2025 Sustainable Cotton Challenge

# Looking ahead

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# Our vision for the future of cotton



The goal is to develop and support thriving rural communities where soils will be healthy, biodiversity is flourishing, and people have both food security and economic stability. Responsibly grown cotton using regenerative practices will be central to delivering on this vision.

## 2018/19

25 percent of the world's cotton is more sustainable<sup>(1)</sup>

## Vision for 2025

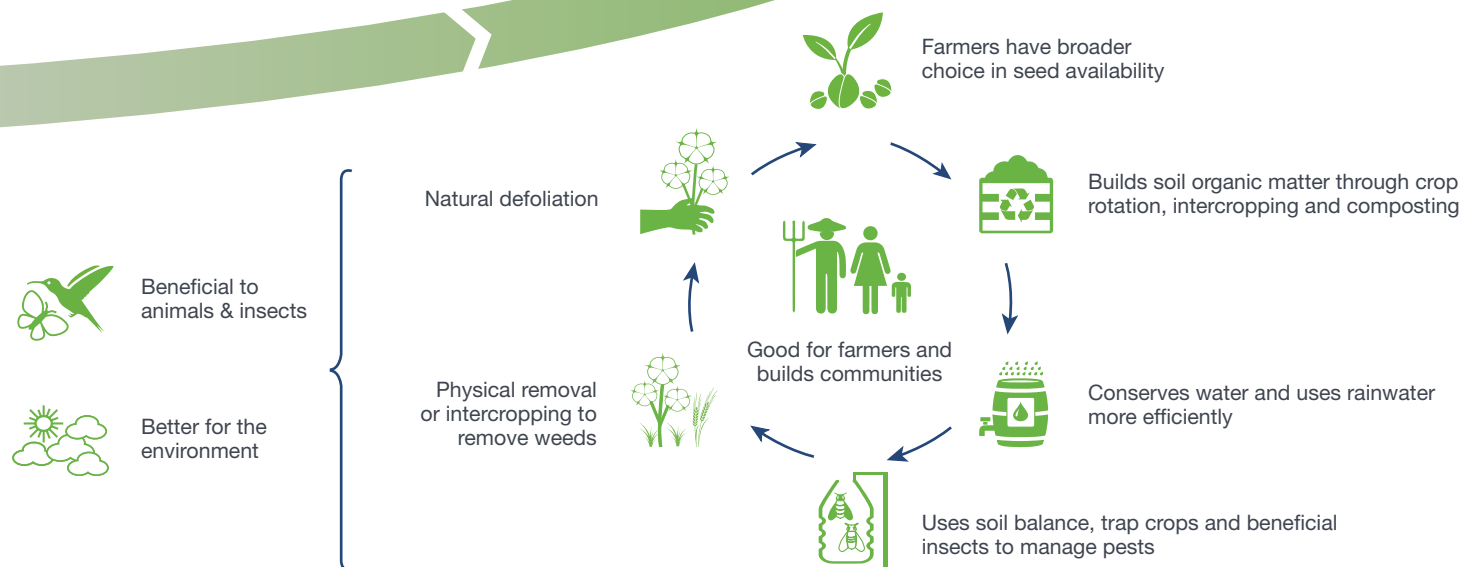
Over 50 percent of cotton volume has been converted to more sustainable solutions. The rest of the industry understands the issues and solutions and is following the lead.

## Vision for 2030

The United Nations Sustainable Development Goals Textile Sector Report communicates significant impacts around water use and quality, biodiversity, food security and case studies supporting the journey to regenerative agriculture and resilient communities.

## Vision for 2040 and beyond

The cotton industry has changed dramatically: it prioritizes sustainable practices, is highly transparent and traceable and provides viable livelihoods for farming communities.



(1) Textile Exchange Preferred Fiber and Materials Market Report 2020

Diagram: Textile Exchange / AboutOrganicCotton.org

# Resources

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There is a plethora of information and resources available to you and your brand along the journey toward a more sustainable cotton supply:

2025 Sustainable Cotton Challenge:

[textileexchange.org/2025-sustainable-cotton-challenge/](https://textileexchange.org/2025-sustainable-cotton-challenge/)

Information on Textile Exchange's Cotton Round Tables:

[textileexchange.org/organic-cotton-round-table](https://textileexchange.org/organic-cotton-round-table)

[textileexchange.org/round-tables/sustainable-cotton-round-table-2/](https://textileexchange.org/round-tables/sustainable-cotton-round-table-2/)

Textile Exchange Organic Cotton Market Report 2020:

[textileexchange.org/wp-content/uploads/2021/05/Textile-Exchange\\_Organic-Cotton-Market-Report\\_2020-20200810.pdf](https://textileexchange.org/wp-content/uploads/2021/05/Textile-Exchange_Organic-Cotton-Market-Report_2020-20200810.pdf)

Textile Exchange Preferred Fiber and Materials Market Report 2020:

[textileexchange.org/wp-content/uploads/2020/06/Textile-Exchange\\_PREFERRED-Fiber-Material-Market-Report\\_2020.pdf](https://textileexchange.org/wp-content/uploads/2020/06/Textile-Exchange_PREFERRED-Fiber-Material-Market-Report_2020.pdf)

Cotton mapping to the SDGs:

[textilesforsdgs.org/resources/insights](https://textilesforsdgs.org/resources/insights)

The Cotton Up Guide from Forum for the Future:

[cottonupguide.org](https://cottonupguide.org)



# Textile Exchange Membership

Connect. Collaborate. Accelerate.



Textile Exchange Membership connects you to a powerful community of brands, suppliers, and companies, large and small, from across the textile value chain, all seeking to create a more sustainable and responsible fiber and materials industry. Members gain access to learning opportunities, tools, relevant data, insight reports, industry networks, connections, and, above all, the opportunity to take action, individually and collectively.

“With buy-ins from Industry leaders like H&M, Inditex, Nike, and Lenzing, Textile Exchange’s membership reads like a who’s who of the garment and textile industry.”

- Sourcing Journal

## Benefits of Membership:



### Unlock the Power of Community

Connect. Collaborate. Accelerate.

Join a community that can collectively accomplish what no individual or company can do alone. Gain access to The Hub, our Membership Community Portal.



### Convene & Connect

Expand your organization’s network through our member-only online community portal, The Hub, exclusive members-only events, webinars, and publications. Benefits include free or discounted tickets to our annual conference, depending on the level of membership.



### Access to Expertise

Dedicated support from Textile Exchange’s staff (900 years of combined experience) via The Hub. Individual team access and virtual training for our Partner-Level Members. Access our Member-only Fiber & Materials resources.



### Show Leadership & Gain Exposure

Be featured in Textile Exchange’s member-focused communications, including exposure on our website, social media, member-only reports, and member spotlights\*.

\* Member spotlights reserved for Partner-Level members.



### Develop, Measure & Track Progress to a Preferred Fiber Strategy

Demonstrate progress and industry leadership towards achieving the Climate+ goals.

All members participating in the Corporate Fibers and Materials Benchmark have access to advanced report cards.

## Contact the Membership Team

For more information, contact:  
[Membership@textileexchange.org](mailto:Membership@textileexchange.org)



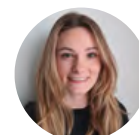
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Thank you to all cotton initiatives, 2025 Sustainable Cotton Challenge initiatives, signatories, and insider story providers:

ABRAPA • BASF e3 • Better Cotton Initiative • Cotton made in Africa • Cotton Connect / REEL Cotton • Fairtrade International  
Field to Market • ISCC • *myBMP* • Regenerative Organic Certified • US Cotton Trust Protocol

AB Lindex • Adidas • Aldi (Nord and Sud) • Americo Group (NYC) • ASOS • A-Z (Varner) • BikBok (Varner) • Bloomsbury Mill (UK) • Boll and Branch • Burberry • Burton • C&A • Carlings (Varner) • Coyuchi • Cubus (Varner) • Days like This (Varner) • Dedicated Brand • Dressmann (Varner) • EILEEN FISHER • F&F at Tesco • Greenfibres • G-Star • H&M • Hanky Panky • Hemtex • IKEA • Indigenous Designs • Inditex • KappAhl • Kathmandu • Kering • Kid (Norway) • Knickey (NYC) • Levi's • M&S • Mantis World • Mara Hoffman (NYC) • Mayamiko • MetaWear • Modelmalhas • Mulberry • Mustaquim • Naturpedic • Next (UK) • Nike • Orimpex • Otto Group / bonprix • prAna • Pratibha • Reformation • Sainsbury's • SkunkFunk (SKFK ethical fashion) • Stella McCartney • Ted Baker (UK) • TenTree (VC, BC) • The Very Group • Timberland • UPW Urban (Varner) • VARNER Volt (Varner) • We Fashion (NL) • Woolworths • World Textile Sourcing • Wow (Varner)

Cotton Connect • Coyuchi • Inditex • Piping Hot • Reverse Resources • WTS

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**Cover image:** Rita Hogan (Cotton plant, Texas, United States).



Textile Exchange envisions a global textile industry that protects and restores the environment and enhances lives.

[TextileExchange.org](https://TextileExchange.org)

Textile Exchange announced its new 2030 Strategy: Climate+ in October 2019. Under the Climate+ strategic direction, Textile Exchange will be the driving force for urgent climate action with a goal of 35–45 percent reduced CO<sub>2</sub> emissions from textile fiber and material production (pre-spinning phases) by 2030.

The 2030 Strategy: Climate+ is the result of extensive stakeholder engagement through interviews and an online survey conducted with a mix of Textile Exchange members and non-members from organizations representing brands, retailers, suppliers, manufacturers, nonprofits and professional services across the globe.

For years, Textile Exchange has promoted practices, standards, and resources that benefit the climate. Adopting the Climate+ strategy makes climate a deliberate priority and organizational focus for an impact area that requires immediate attention and for which we have many existing tools and resources. The “+” in Climate+ allows Textile Exchange to prioritize climate while continuing to address other impact areas that are interconnected with climate in most situations (e.g., water, biodiversity, forests, soil and animal welfare). The “+” is also an acknowledgement that Textile Exchange cannot achieve this new 2030 goal of 30 percent reduction in CO<sub>2</sub> emissions from preferred fiber and material production on its own.

Achieving the 2030 Strategy: Climate+ goal will require strong partnerships to accelerate adoption of existing tools as well as enable disruptive innovation around new business models and zero carbon materials.

The 2025 Sustainable Cotton Challenge is Partnership In Action!

[textileexchange.org/2025-sustainable-cotton-challenge](https://textileexchange.org/2025-sustainable-cotton-challenge)