



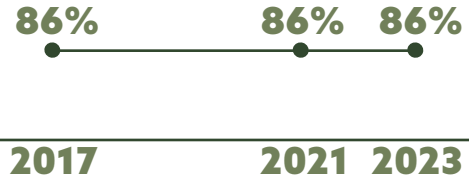
COTTON INCORPORATED'S SUPPLY CHAIN INSIGHTS
Sustainability in Consumers' Lives and Wardrobes



Concern for the environment has remained steady since 2017, as **nearly 9 in 10 consumers globally (86%) say environmental change is real and requires a change in our behavior.** As in previous survey waves, climate change tops consumers' list of environmental concerns, followed by water quality & scarcity and air pollution.

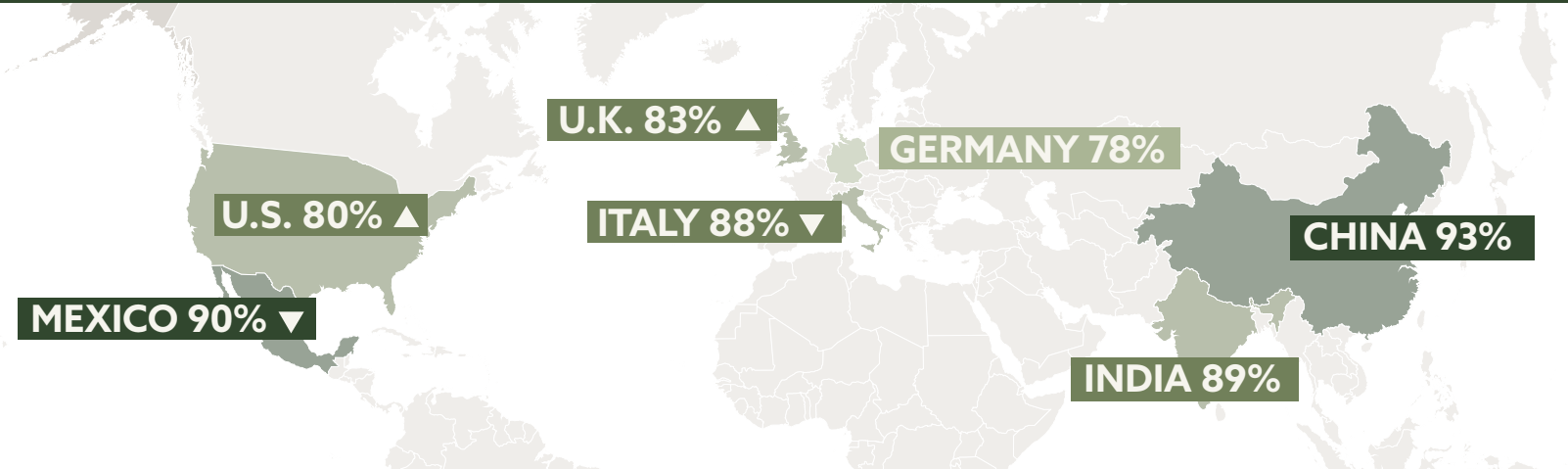
GLOBAL CONCERN FOR SUSTAINABILITY

% saying environmental concerns are real and require a change in behavior



CONCERN FOR SUSTAINABILITY BY COUNTRY

% saying environmental concerns are real and require a change in behavior
(Arrows indicate change from previous waves)



TOP ENVIRONMENTAL CONCERNS



48%
 Climate change/warming, extreme weather



42%
 Water quality, scarcity, pollution



38%
 Air pollution, quality



25%
 Land pollution, waste, deforestation



24%
 Resources population, food scarcity



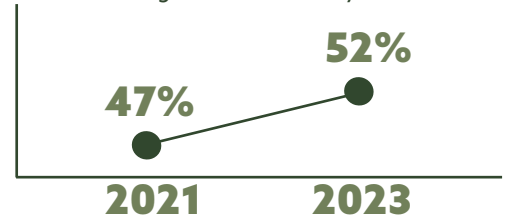
24%
 Oceans waste, microplastics, fishing



While the level of consumer concern with environmental change has remained steady, this concern is playing a strong role in more consumers' lives. They show a strong motivation to take sustainable actions such as recycling cans and bottles, reducing waste, and limiting water usage.

IMPACT OF SUSTAINABILITY

% saying environmental concern plays a strong role in their daily lives



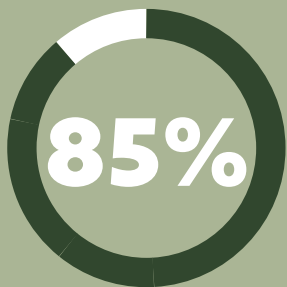
IMPACT BY COUNTRY

% saying environmental concern plays a strong role in their daily lives

(Arrows indicate change from previous waves)



SUSTAINABLE ACTIONS



are motivated to take sustainable actions

% who do this regularly



88% Recycle cans, bottles, paper



86% Reduce waste



85% Purchase energy efficient appliances



84% Limit water usage



82% Purchase products with minimal packaging



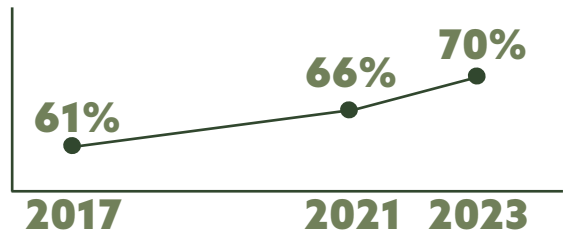
SUPPLY CHAIN INSIGHTS: SUSTAINABILITY IN CONSUMERS' LIVES AND WARDROBES



Sustainability is also playing a bigger role as consumers shop for clothes. In 2023, **7 in 10 global consumers said sustainability influences their clothing purchases, up from 61% in 2017**. Consumers say they consider sustainability because it is important to improve the environment and because sustainable clothing is better for their family's health. They look to material, sustainable practices such as recycling, and price to determine whether an item is sustainable.

SUSTAINABILITY IN CLOTHING PURCHASES

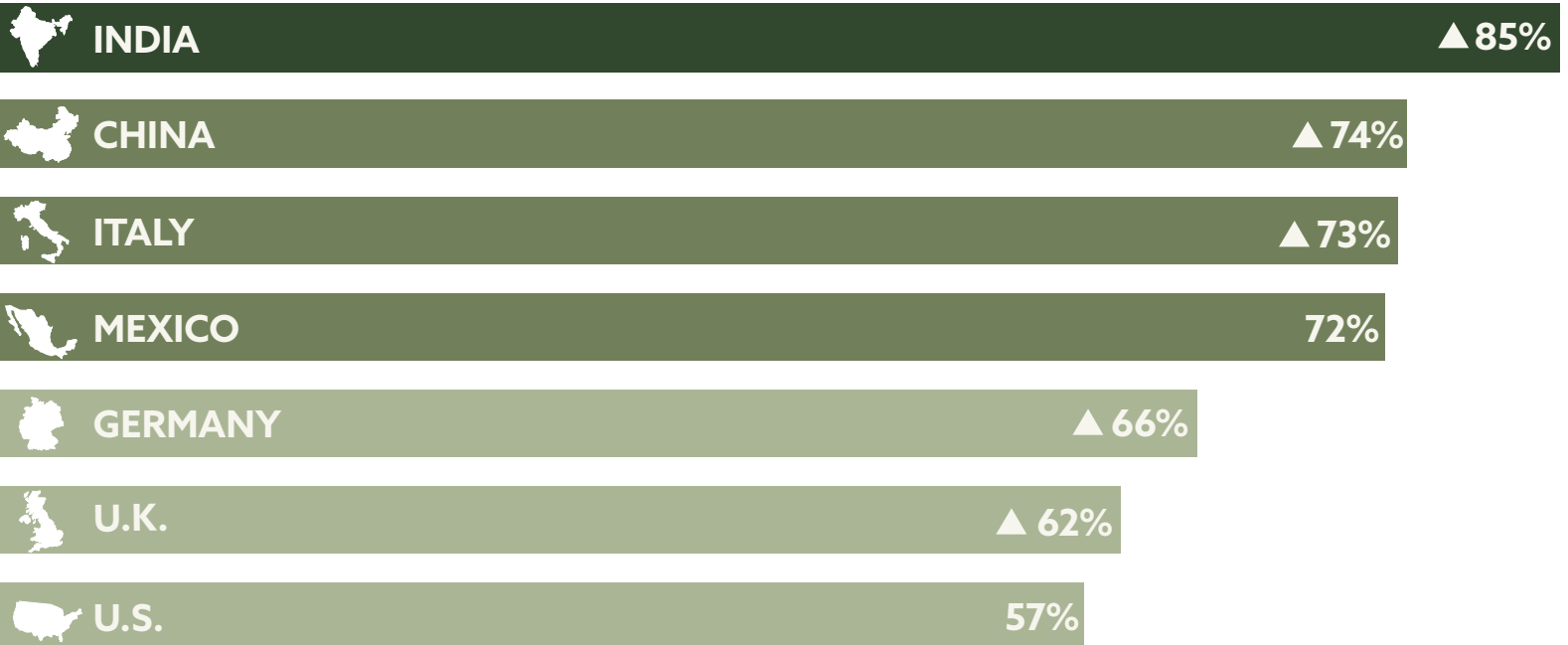
% saying sustainability has a moderate or strong influence on clothing purchases



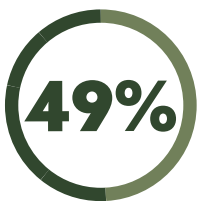
SUSTAINABILITY INFLUENCE BY COUNTRY

% saying sustainability has a moderate or strong influence on clothing purchases

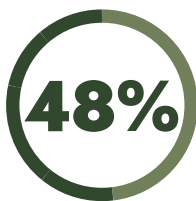
(Arrows indicate change from previous waves)



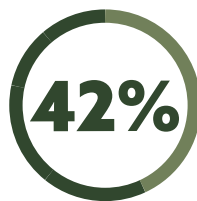
Reasons sustainability influences clothing purchases:



Important to do whatever I can



Important that products can return to earth



Better for my family's health

How Consumers Determine Sustainability



42% Made with natural fibers like cotton



42% Can be recycled



38% Price



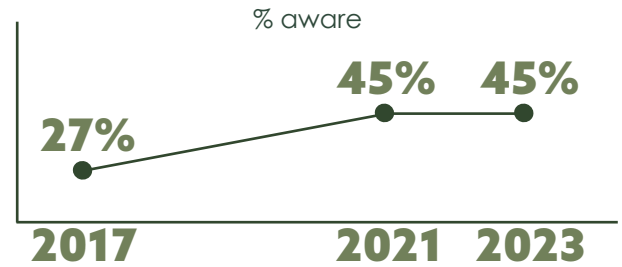
36% Made with recycled materials



SUPPLY CHAIN INSIGHTS: SUSTAINABILITY IN CONSUMERS' LIVES AND WARDROBES

Microplastic waste in the oceans is a particularly relevant environmental problem to the textile industry. Microfibers shed from laundering cotton degrades 95% more in wastewater than polyester microfibers². These synthetic microfibers become microplastic waste that infiltrates our oceans. Awareness of microplastic waste in the oceans has grown tremendously since 2017, with significant gains in all countries surveyed. Moreover, consumers perceive cotton and other natural fibers to be safer for the environment than polyester, rayon, and other manmade fibers.

AWARE OF MICROPLASTIC WASTE



AWARENESS BY COUNTRY

% aware

(Arrows indicate change from previous waves)



SAFE AND UNSAFE FIBERS FOR ENVIRONMENT

% saying fiber is safe for the environment

