



COTTON INCORPORATED'S | SUPPLY CHAIN INSIGHTS

SUSTAINABILITY CONCERNED CONSUMERS

At the conclusion of the warmest decade worldwide since record-keeping began, sustainability is on the minds of global consumers². Nearly 9 in 10 consumers (86%) say environmental change is real and requires a change in our behavior, a number that has remained steady since 2017, and climate change tops their list of concerns. Consumers are motivated to effect change, and brands can partner with them by offering products they perceive as natural and renewable.

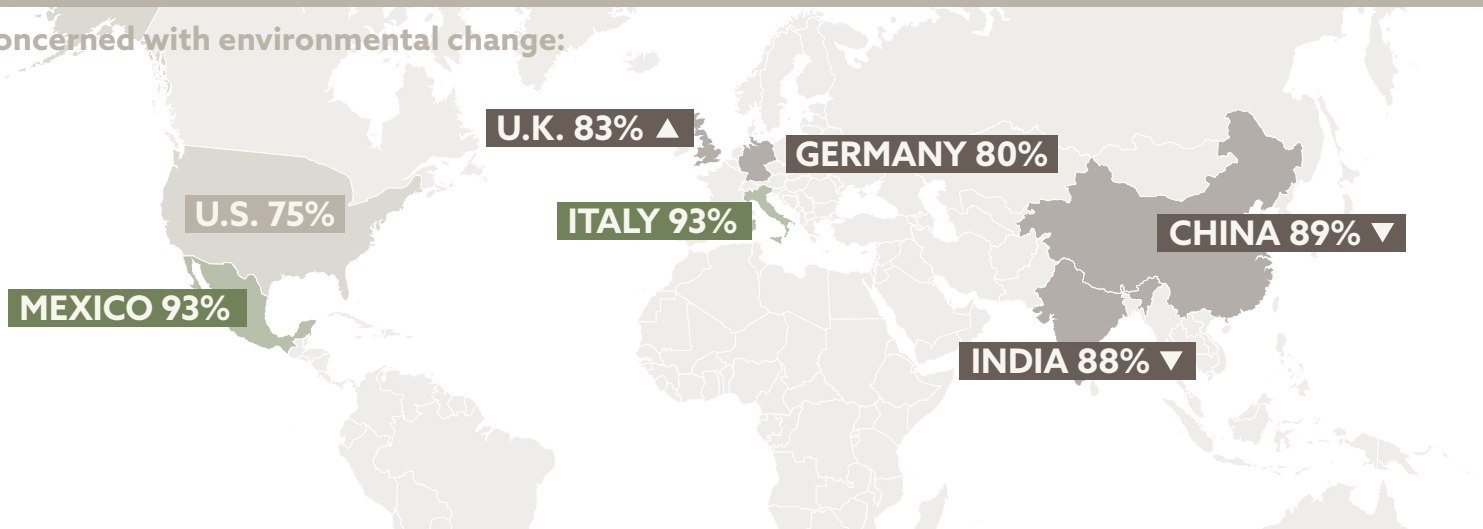
KEY INSIGHTS

- > Environmental change is a concern for consumers worldwide, highlighting the need for brands to address the environmental impact of their products.
- > While comfort, price, and fit remain primary purchase drivers, consumers are motivated to take sustainable actions, including when purchasing clothing.
- > Brands can speak to consumers' concern for sustainability by marketing clothing made from natural fibers and highlighting its low impact on the environment.

GLOBAL CONCERN FOR SUSTAINABILITY

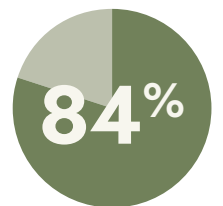
Percent saying concerns about environmental change are very real and require change in our behavior.

Concerned with environmental change:



TOP ENVIRONMENTAL CONCERNS

Percent rank issues as #1 or #2 environmental concern.



are motivated to take sustainable actions



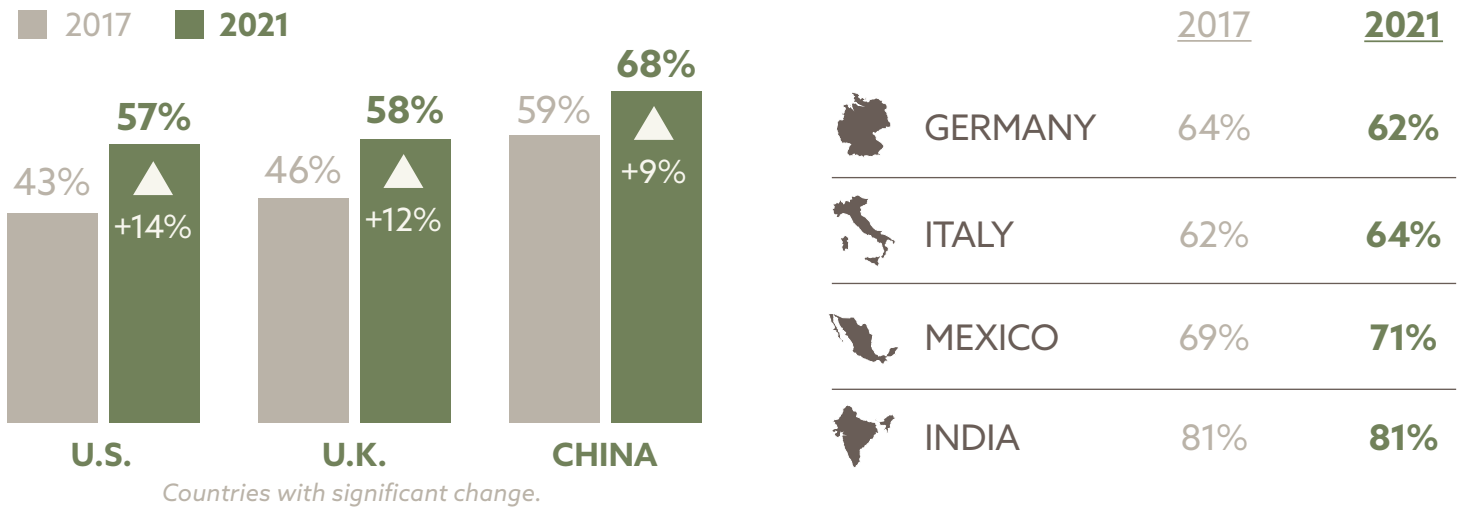
INFO: MARKETINFORMATION@COTTONINC.COM LIFESTYLEMONITOR.COTTONINC.COM

Source: CCI & Cotton Incorporated's 2017 & 2021 Global Sustainability Survey, a survey of 6,000 consumers in the U.S., U.K., Germany, Italy, Mexico, India, and China. Additional Sources: ²US Environmental Protection Agency, 2021. ©2021 Cotton Incorporated.

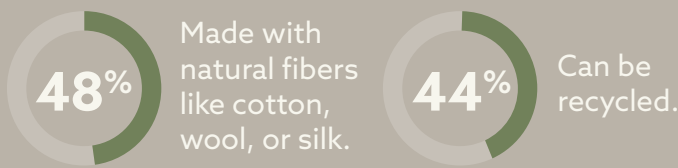
While global consumer concern for environmental change has remained steady since 2017, more consumers report that sustainability influences their clothing purchases, from 61% in 2017 to 66% in 2021. This increase is particularly strong in regions where interest was lower in 2017, with 10-point jumps among consumers in the UK, the US, and China. When thinking of sustainability in clothing, consumers connect it with naturalness and low environmental impact, looking for clothing made of natural fibers, especially cotton.

SUSTAINABILITY IN CLOTHING PURCHASES

Percent saying sustainability has a moderate to great influence on their clothing purchases.



What Makes Clothing Sustainable?



What does "sustainable" mean?

It can be used repeatedly and has no impact on the environment.

- Chinese consumer

What does "natural" mean?

Made from natural raw materials such as cotton, silk...not synthetically produced.

- German consumer

REASONS TO PURCHASE SUSTAINABLE CLOTHING

Percent saying sustainable clothing is:



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