



**COTTON
OUTLOOK**

NEWS • DATA • ANALYSIS



WORLD COTTON DAY 2026



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WORLD COTTON DAY 2026

This marks our seventh Special Feature in celebration of World Cotton Day – a global commemoration of the natural fibre that clothes the world and supports millions of livelihoods.

World Cotton Day, marked annually on October 7, provides an opportunity for us all to celebrate and promote the many social, environmental and economic benefits of the fibre, under the fitting permanent theme ‘Cotton for Good’. Tashkent, Uzbekistan, will host this year’s Partners Conference, but a wide range of activities will take place across the world to observe the occasion.

This edition takes stock of developments in the sector over the past 12 months, a period marked by price volatility, geopolitical uncertainty and changes to the international trading landscape. Misinformation, shifting legislative requirements, and declining market share remain key challenges for the industry, but there are opportunities for progress in the face of instability. Indeed, campaigns such as Plant Not Plastic, the efforts of the Make the Label Count coalition, and advancements in sustainable production have demonstrated the possibility of positive change with collaborative action.

We are truly grateful for the time and effort taken by the authors of the highly insightful contributions to this publication.

**HAPPY WORLD COTTON DAY
2026!**



RUBY MCGRATH

Trade and Markets Reporter, Cotton Outlook





**INTERNATIONAL
COTTON
ADVISORY
COMMITTEE**

COTTON FOR GOOD: WORLD COTTON DAY BELONGS TO EVERYONE

Every year on October 7, the global cotton and textile community has an opportunity to do something that we do not do often enough: celebrate cotton.

World Cotton Day was created to highlight the enormous contributions cotton makes to people, communities, economies, international trade, and the environment. It is a day to recognize the farmers who grow it, the workers and businesses that transform it, the researchers who improve it, and the millions of people around the world whose livelihoods depend on it.

But World Cotton Day was never intended to belong to any one organization, government, or event. It belongs to everyone.

That idea has become increasingly important as World Cotton Day has grown from a single international gathering into a truly global celebration.

FROM ONE EVENT TO A GLOBAL MOVEMENT

The idea for World Cotton Day originated at the International Cotton Advisory Committee (ICAC), and the first celebration was held at World Trade Organization headquarters in Geneva in 2019. More than 800 people attended, including ministers, senior government officials, heads of international organizations, and representatives from throughout the global cotton and textile value chain.

The initiative gained permanent international recognition remarkably quickly. In 2021, the United Nations General Assembly officially designated October 7 as World Cotton Day on its permanent calendar.



ERIC TRACHTENBERG

Executive Director, International Cotton Advisory Committee

Today, six other international organizations work together with ICAC on the World Cotton Day Partners Conference:

1. The Food and Agriculture Organization of the United Nations (FAO),
2. International Atomic Energy Agency (IAEA),
3. International Trade Centre (ITC),
4. United Nations Conference on Trade and Development (UNCTAD),
5. United Nations Industrial Development Organization (UNIDO), and
6. World Trade Organization (WTO).

Those organizations help provide a focal point for World Cotton Day, but the real strength of the celebration comes from what happens everywhere else in the world.

Cotton associations, governments, private sector businesses, schools, universities, farmers, researchers, manufacturers, and individuals have found their own ways to participate. They have organized conferences and field visits, held photography and essay contests, conducted educational programs, produced videos, organized community activities, and used social media to tell positive, and often surprising, stories about cotton.

There is no single “correct” way to celebrate World Cotton Day.

If an activity helps someone understand cotton a little better, recognize the people behind it, or appreciate what this remarkable natural fiber contributes to our lives, it makes a difference — and that’s what October 7 is all about.

WHY “COTTON FOR GOOD”?

Individual World Cotton Day events often adopt themes that reflect the issues and opportunities most important to their communities. But the permanent global theme of World Cotton Day is deliberately simple:

Cotton for Good.

That is what October 7 is ultimately about.

Cotton supports millions of families around the world, including in developing and least-developed countries where agriculture can provide a critical path to employment and economic opportunity. Its value chain creates economic opportunities far beyond the farm, through ginning, spinning, textile manufacturing, apparel production, trade, transportation, retail, and countless ancillary industries.

Cotton is renewable, biodegradable, versatile, and almost entirely usable. Beyond fiber, cottonseed can provide cooking oil for humans, protein cakes for livestock, and raw materials for a wide range of industrial applications including pharmaceuticals, construction boards, and currency notes.

It also has an extraordinary *human* story. Cotton connects smallholder farmers and global brands, scientists and designers, rural communities and major cities, and some of the

world’s least-developed economies with one of the largest and most sophisticated global supply chains.

That is why the ICAC believes that cotton is a global good — and World Cotton Day gives us one day each year to make sure the rest of the world hears that story.

A NEW HOME FOR WORLD COTTON DAY

In 2026, World Cotton Day is also getting a new digital home.

A completely redesigned **www.WorldCottonDay.com** has been created to make it easier for people everywhere to learn about cotton, understand the purpose of World Cotton Day, find resources, see how others around the world are celebrating, and — most importantly — get involved themselves.

The new website is sponsored by Wakefield Inspection Services, the Official Digital Sponsor of World Cotton Day, whose support has helped make this expanded global resource possible.

The goal is not simply to create another website about cotton. It is to create a place that people throughout the entire cotton and textile community can use.

Organizations planning their own World Cotton Day activities will be able to find logos and promotional materials, educational resources, ideas for celebrations, information about cotton, and examples of activities taking place around the world.

We also hope the website will answer one very simple question:

WHAT WILL YOU DO FOR COTTON?

You do not need to organize an international conference to participate in World Cotton Day.

A school can hold an essay or drawing contest. A cotton producer can invite students to visit a farm. A textile company can show consumers how cotton becomes a finished product. A university can organize a seminar. A researcher can explain an innovation. A retailer can highlight cotton products. An association can share facts about cotton on social media. An individual can simply wear cotton and tell someone why this natural fiber matters.

Big or small, every bit of effort helps.

WORLD COTTON DAY 2026

This year, the World Cotton Day Partners Conference will be held in Tashkent, Uzbekistan, on October 7, bringing together the international partner organizations, government leaders, cotton and textile professionals, researchers, and other stakeholders from across the global value chain.

Uzbekistan is an especially appropriate setting for the celebration. Its cotton and textile sector represents the connection between agriculture, manufacturing, trade, technology, employment, and economic development that World Cotton Day was created to highlight.

The conference will provide an opportunity to discuss the challenges and opportunities facing cotton, but World Cotton Day 2026 will extend far beyond Tashkent.

That is the point.

While hundreds of people may gather at an official event, millions more people live, work, study, and do business in cotton-producing and cotton-consuming communities around the world.

World Cotton Day is their day, too.

TELL COTTON'S STORY

Cotton faces very real challenges. Synthetic fibers continue to dominate the global textile market, while misinformation about cotton's environmental and social performance can spread quickly and widely (that's why telling the #TruthAboutCotton matters!).

Those challenges cannot be addressed by one organization or one event.

The global cotton community has an enormously powerful story to tell, but we have to tell it.

October 7 provides a moment when everyone can speak together — not by repeating exactly the same message or holding exactly the same kind of event, but by showing the world what cotton means where we live and work.

Show people the farmer behind the fiber. Show them the scientist developing a better cotton variety, the gin transforming seed cotton, the spinner making yarn, the designer creating something new, the factory providing jobs, and the communities whose prosperity is connected to the crop.

Show them what happens to cottonseed. Explain the dangers of microplastic pollution, and why biodegradability matters. Talk about innovation. Celebrate cotton's history, and show people its future.

We're asking you to participate.

World Cotton Day started with an idea. It became an international event, then a United Nations-recognized observance, and ultimately a celebration embraced by people throughout the global cotton and textile community. What happens next depends on what kind of effort all of us are willing to put in on cotton's behalf.

On October 7, wherever you are in the world, find your own way to celebrate.

Cotton is a global public good. Let's make sure the world knows it.





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FIBRE TRACEABILITY - A VEHICLE TO ENSURE SUSTAINABILITY OR INJUSTICE?

Polyester accounts for more than 50% of all fibre production, while cotton accounts for a little over 20% and wool 1%. Nevertheless, brands, retailers and government regulators require that only natural fibres be traceable from retail, through the supply chain, all the way back to the farm. Everyone simply asserts that there is no need to trace polyester.

In a paper published by the Bremen Cotton Exchange on Earth Day 2026, this assertion and its underlying assumptions are debunked. (<https://baumwollboerse.de/en/competencies/publications/report-on-traceability/>)

CHEMICAL EXPOSURE

From the extraction of oil and natural gas to the production of plastic, the hazards posed by the presence of chemicals in the polyester supply chain are seriously underestimated.

In May 2023, the United Nations Environment Program (UNEP) published a report which showed that 1) Chemicals are an integral part of plastics; ii) Chemicals of concern have been found in plastics across a wide range of sectors and product value chains, including textiles; iii) ten groups are identified as being of major concern due to their high toxicity and potential to migrate impacting our health and our environment; iv) such chemicals can be released from plastic along its entire life cycle, and women and children are particularly susceptible.

More than 2,500 chemicals are used, present, or released by the world's most common polyester, polyethylene terephthalate, or PET. Only 31 of the 2,500 have been evaluated as without hazard, while more than 800



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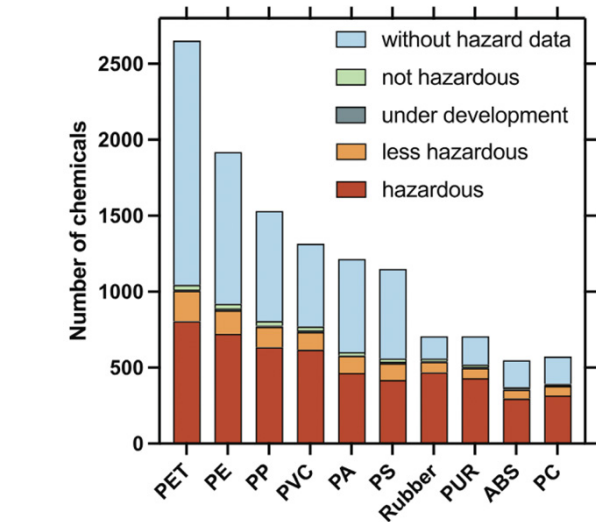
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TERRY TOWNSEND

Statistician, DNFI

are known to be hazardous, and exposure varies by location. For example, 1,4 dioxane, a byproduct of the manufacture of PET, presents an ‘unreasonable risk to human health’. In 2023, one PET production facility in West Virginia, USA, had an average discharge concentration of 46,140 micrograms per litre. The EPA-acceptable limit is 35 micrograms per litre.



Chemical leakage is not limited to the production phase of the life of a PET molecule; chemicals continue to leach while the molecule exists, essentially forever. A material flow study in China found that the largest release of the PET industry’s preferred polycondensation catalyst, antimony, occurs in manufacturing. But, fibres disposed of in landfill, incineration, mechanical, and chemical recycling all release antimony to some extent. Antimony is a regulated contaminant with a toxicity on par with arsenic, and it is just one of the 236 chemicals known to be released by PET. Most of the other 235 are without hazard data, so their risk is unknown, but non-zero.

WATER USE

The notion that polyester production pollutes/ consumes very little water is a long-standing fantasy.

In 2016, the Water Footprint Network found that polyester had an average water footprint of between 51,000 and 71,000 cubic meters per tonne of fibre. In comparison, one tonne of cotton fibre requires approximately 10,000 cubic meters of water to produce. In other words, **cotton requires between one-fifth and one-seventh the amount of water per tonne** required to produce polyester fibre, yet

brands, retailers and regulators are requiring that cotton be traced, but not polyester!

Table 3 – Water footprint of polyester fibres

	Water footprint (m³/tonne)		
		Minimum	Maximum
Polyester Filament Yarns	Blue	50	52
	Grey	50,640	70,981
	Total	50,690	71,033
Polyester Staple Fibres	Blue	30	32
	Grey	51,036	71,377
	Total	51,066	71,409

Source: https://waterfootprint.org/resources/WFA_Polyester_and_Viscose_2017.pdf

More and more polyester is being produced from oil and natural gas obtained through fracking, and shale and tight oil production has increased the grey (waste) water associated with polyester production significantly. Grey water is generally so toxic that even when treated, it is only suitable for reuse in fracking. The most common disposal method is underground injection. As of 2022, US flowback and produced water (FPW) was primarily pumped into more than 187,000 disposal wells across the country, permanently tainting the surrounding aquifers.

STANDARDIZED POLYESTER PRODUCTION PRACTICES

The apparel industry claims that factory fibres, unlike farmed fibres, are standardized. Accordingly, it is claimed that just one LCA of European PET production provides representative data for global polyester fibre.

Even including Turkey, European polyester production is only 3% of the global supply and is not representative of world conditions. Further, the base data for manufacturing used in impact calculations is from 2009, and the feedstock data is from 2001. From the source country mix to the emissions associated with each country’s output, this data grievously underestimates current impacts.

Environmental impacts vary substantially depending on where the PET is manufactured and the type of feedstock used. For example, water use will be considerably greater if the feedstock is fracked. Carbon emissions

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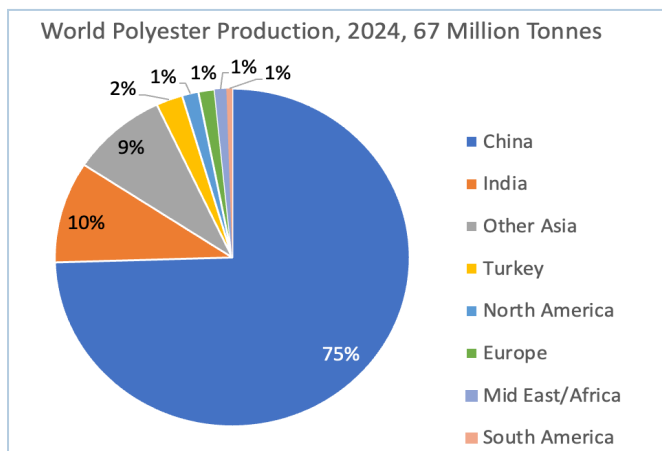
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also vary significantly. Saudi Arabia's flaring emissions per tonne of oil averaged 12 kilograms in 2024, while US flaring emissions averaged 29 kilograms, more than double their Saudi equivalent. And yet, Big Sustainability claims it makes no difference where the oil feedstock originates that is used to produce polyester fibre.



Source data: Wood Mackenzie

SANCTIONED ORIGINS

Since the Russian invasion of Ukraine in 2022, the export flow of Russian oil has changed dramatically. China, India and Turkey now account for almost all Russian energy exports, and those three countries happen to be the three largest producers of polyester fibre.

In 2023 (most recent year of final data from the International Energy Agency), we estimate that 21% of the world's polyester supply originated from Russian, Iranian and Venezuelan oil, and the share probably increased during 2024 and 2025.

Russia accounted for 15% of the total supply of oil in China in 2023, and China accounts for 75% of world polyester production. Therefore, about 11% of the world's polyester supply produced in China originated as oil in Russia.

Russia accounted for 35% of the total supply of oil in India in 2023, and India accounts for 10% of world polyester production. Therefore, approximately 4% of the world's polyester supply produced in India originated as oil in Russia.

Calculations are more difficult for oil originating in Iran and Venezuela because their exports are sanctioned, and so none are reported. However, Malaysia emerged as China's third largest oil supplier in 2024, almost certainly reflecting oil imports from Iran and Venezuela which are rebranded as Malaysian to evade sanctions. China's imports of crude oil from Malaysia grew from just 5,400 barrels per day (bpd) in 2015 to 1.4 million bpd in 2024. However, Malaysia only produced 565,000 bpd in 2024. The difference (roughly 800,000 bpd, or about 8% of total imports by China) is probably due to oil exported from Iran and Venezuela that is delivered to China via ship-to-ship transfers in the waters off Malaysia. Therefore, another 6% of the world's supply of polyester fibre probably originated as oil in Iran and Venezuela that was exported to China and used as feedstock.

Leading Indian polyester manufacturer Reliance Industries reportedly sourced 50% of its oil from Russia in 2024 and 2025.

POLYESTER CANNOT BE TRACED

The assertion that it is impossible to track synthetic materials back to the source of the crude oil is baseless.

China accounts for 75% of global PET production, India 10% and Turkey 2%. Within China, the 10 largest producers have a total annual capacity that exceeds China's current output.

There are about 900 active oil refineries in the entire world, and just 5 countries account for 50% of global oil and gas production. In contrast, there are 10 million cotton households in India alone, 24 million households worldwide, and cotton is cultivated across multiple climatic zones, farm sizes, and soil types in more than 70 countries.

To suggest that you can trace cotton using blockchain technology, but not virgin polyester, is risible.

RPET IS JUST VIRGIN PET ONE STEP REMOVED

The contention by some brands and initiatives that they are absolved as they use/plan to use only recycled polyester is equally invalid. Polyester constitutes c54% of the global fibre supply, and of that, only about 12% is recycled, predominantly (98%) from plastic bottles. There is no commercially significant polyester fibre-to-fibre recycling. Consequently, polyester fibres made from recycled PET are effectively unrecyclable, and bottle rPET is fundamentally virgin PET at one step removed.

CONCLUSION

As demonstrated with full citations in our paper, it is not only possible to trace polyester through the supply chain back to origin, it is absolutely necessary to do so if sustainability goals for the fashion supply chain are to be met. To burden millions of producers of cotton and wool with traceability requirements, while allowing polyester producers to avoid accountability, not only ensures that sustainability goals will not be met but also represents a moral injustice.



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FROM SCIENCE TO COMPLIANCE

For much of the past decade, those of us who work on cotton's behalf spent a great deal of our energy correcting the record. Exaggerated water figures, outdated pesticide narratives, and casual claims about cotton's environmental footprint circulated widely, and repetition gave them the weight of fact. That period shaped a lasting decision at Cotton Incorporated: rather than contesting claim after claim, we would build the measurement systems that allow the discussion to proceed from evidence. We invested in primary data collection, peer-reviewed publications, and independent critical review, and that investment continues to deliver. It was built for scrutiny, and scrutiny is now arriving across our markets in the form of regulation and compliance requirements.

THE NEW U.S. COTTON LIFE CYCLE ASSESSMENT

In January 2026, Cotton Incorporated completed a new life cycle assessment (LCA) of U.S. cotton production, built on primary data from 753 growers across 17 states, conducted in conformance with ISO standards, and subjected to independent critical review. The results are reported in full. Producing one kilogram of U.S. cotton fiber generates approximately 1.45 kilograms of fossil carbon dioxide equivalent emissions, with field emissions and fertilizer production the primary contributors across impact categories and irrigation dominant in the water-related categories. When biogenic carbon dioxide stored in both the fiber and the soil is considered, cotton production removes approximately 1.71 kilograms of carbon dioxide equivalent per kilogram of fiber, resulting in a cradle-to-gate footprint of negative 0.264 kilograms of carbon dioxide



JESSE S. DAYSTAR, PH.D.

Chief Sustainability Officer, Cotton Incorporated

equivalent per kilogram of cotton fiber.¹ That biogenic storage is temporary, and the carbon will be released at later points in the product life cycle; the study is explicit on this point and identifies improved circularity at the end of life as the route to improving storage permanence. The hotspots are reported in detail because they define where research investment and grower programs can deliver the next round of improvement.

Cotton's data foundation is broader than any single study. Other industry organizations have recently completed or commissioned life cycle assessments of cotton, and a multi-stakeholder cotton expert group has published an industry-aligned LCA methodology for

creating cotton fiber datasets,² giving the sector a common technical basis for generating credible data. The practical significance is that cotton now enters sourcing and compliance conversations with current primary data behind it, just as regulation and brand requirements begin to demand it.

RESEARCH DISTINGUISHES COTTON FROM PERSISTENT SYNTHETIC APPAREL

The same commitment to measurement informs our research to better understand cotton's environmental performance relative to synthetic competing fibers, particularly with respect to plastic pollution. In 2024, colleagues and I published a comprehensive assessment of the apparel industry's plastic footprint in *Nature Communications*.³ In 2019, the global apparel industry generated an estimated 8.3 million tonnes of plastic leakage (e.g., the plastic that ends up in the environment rather than remaining within managed systems). That accounts for roughly 14 percent of overall global plastic leakage, from a sector that accounts for only about 4 percent of plastic production. The source of that leakage is widely misunderstood. The dominant pathway is not the washing machine but the mismanaged synthetic garment at the end of its life, discarded either in the country where it was first worn or in the countries of the Global South that receive used clothing exports. Microplastic shedding during laundering, while presenting its own environmental concerns and receiving much of the industry's attention to date, represents less than 2 percent of the apparel industry's plastic leakage.³

The work underway at the design stage deserves acknowledgment. Standardized shedding test methods and low-shed fabric constructions represent serious effort, and fabric construction in particular is the most effective route to reducing shedding. That work, however, rests on two premises the evidence does not support. The first is that shedding is the principal problem, when the far larger issue is what becomes of the garment after disposal. The second is that all shed microfibers are equivalent. A garment made from synthetic fiber is a plastic product, and it remains one after it is discarded; construction and finishing can slow shedding during use, but they do not change how the material

behaves in the waste stream, where it persists and fragments as plastic does.

CELLULOSIC AND SYNTHETIC MICROFIBERS ARE NOT EQUIVALENT

On that second premise, the published literature has now been examined systematically. In a review conducted with North Carolina State University and published in *BioResources* in 2025,⁴ we assessed the full body of research on the biodegradability of cellulose fibers, including cotton microfibers, across wastewater treatment, fresh water, seawater, soil, and compost environments. Cotton and other cellulosic fibers biodegrade in each of these settings, while synthetic fibers persist for very long periods. The review also found that a plant-based origin is no guarantee of degradability, as some bio-based plastics resist breakdown as well; degradation behavior is determined by the chemistry of the material. A shed cotton fiber and a shed polyester fiber, therefore, present very different environmental problems, and treating them as interchangeable misdirects both investment and policy.

A MEASUREMENT GAP IN THE INDUSTRY'S FRAMEWORKS

None of this is currently visible in the tools guiding fiber choices. The life cycle assessment frameworks and scoring indices used across the industry, including the Higg Materials Sustainability Index, evaluate fibers on carbon, water, energy, and chemistry, but plastic pollution appears nowhere in the calculation. A garment that will persist in the environment for centuries, fragmenting into microplastics as it degrades, carries no penalty for doing so, and sourcing decisions are consequently being made with a substantial gap in both perspective and data.

That gap is becoming a compliance risk rather than an academic one. Regulators have begun to treat microplastics as a contaminant class in their own right; in the United States, the Environmental Protection Agency has for the first time included microplastics on its draft Contaminant Candidate List 6, the list of substances evaluated for possible drinking water regulation.⁶ A candidate listing is not yet a rule, but it marks the direction of regulatory

attention; a brand whose sourcing tools cannot see plastic pollution carries a liability its assessments do not measure.

Cotton Incorporated is funding research to ensure cotton's natural characteristics are fully represented in the methods used to compare textile fibers. Current life cycle assessment methods omit plastic pollution, persistence, and fragmentation, creating a measurement gap in comparisons between cotton and synthetic fibers. Through the MarILCA initiative, characterization factors have been published that allow life cycle assessment to score plastic emissions, with impacts that reflect how long a material persists in the environment,⁵ and complementary modeling of polymer-specific fragmentation and degradation rates is extending that work. Additional research is examining how mismanaged apparel waste fragments into secondary microplastics after disposal and characterizing airborne microplastic exposure, addressing data gaps needed to more completely evaluate cotton relative to synthetic fibers.

The methods now exist for the major frameworks to begin accounting for plastic pollution, and they could adopt them today. Most have not yet done so, and adoption may be slow. Until it happens, every fiber comparison those tools produce is incomplete. The pattern extends beyond any single impact category: across sustainability frameworks, the burden of proof falls heaviest on the fibers that already measure themselves, while the fiber whose production is least examined faces the fewest questions. Cotton is not asking for favorable treatment from these systems. It is asking for fair treatment, in which every fiber answers the same questions, and in which impacts that can be credibly measured, plastic pollution among them, are included in the assessment.

HUMAN EXPOSURE RESEARCH IS EXPANDING

Research on human exposure to microplastics is also expanding rapidly. Microplastics have been identified in various human tissues, including the lungs, placenta, blood, and brain,⁷ and possible associations reported in the literature include inflammation, hormone

disruption, and cardiovascular risks.⁷ The full extent of any health effects remains an active area of scientific investigation. Cotton Incorporated's sustainability division tracks this literature closely and provides targeted quarterly literature reviews to relevant cotton industry collaborators. This research continues to grow in volume and seriousness, and the industry should expect these questions to feature more prominently in regulation and consumer awareness in the years ahead.

SUPPORTING THE INDUSTRY'S MESSAGE

Cotton Incorporated's research provides the scientific foundation for communicating cotton's natural advantages accurately and credibly. Our research on biodegradability, synthetic microfiber persistence, plastic pollution, and life cycle impacts helps establish what the evidence supports about cotton relative to synthetic fibers. That science helps inform Cotton Incorporated communications and the broader U.S. cotton industry efforts, including the National Cotton Council's "Plant Not Plastic" campaign.

IMPLICATIONS FOR THE TRADE

The regulatory landscape is moving in the same direction as the science. Product policy in the European Union, extended producer responsibility programs for textiles in the United States, and emerging disclosure requirements are beginning to treat fiber data and plastic pollution as material commercial questions. Cotton enters that environment with a critically reviewed footprint built on primary data, a systematically reviewed record of biodegradability, and funded research closing the remaining measurement gaps.

On World Cotton Day, the message I would offer this readership is that cotton arrives in the compliance era prepared, carrying science built to withstand scrutiny and supporting an industry committed to building prosperity through trade, transformation, and partnership in a marketplace where every fiber is measured completely and fairly.

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PROGRESS IN AN UNCERTAIN WORLD

Over the past 12 months, the international cotton market has been shaped by various fundamental and broader macroeconomic and geopolitical factors, which have in turn influenced in some ways the direction and progress of sustainability discussions. International prices as measured by the Cotlook A Index drifted gradually lower in the first half of the 2026/27 season, before gaining 31 percent in value over just ten weeks from early March to mid-May. The rally followed a surge in oil prices that commenced as conflict broke out in the Middle East and shipments through the Strait of Hormuz were brought to a standstill.

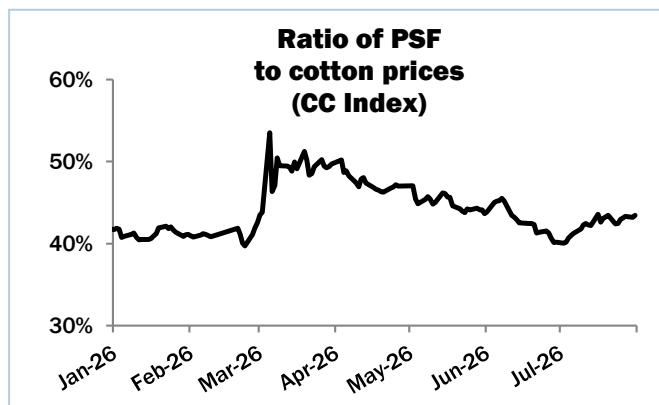
As a derivative of oil, the supply of polyester was also disrupted, and prices rose substantially. In China, polyester staple fibre values jumped by 36 percent between early February and early March, and with reference to cotton prices (the China Cotton Index) the ratio increased from around 40 percent to 54 percent. While both polyester and cotton rates subsequently declined again, the higher relative cost of polyester than before presented an opportunity for natural fibres to attract additional demand, and indeed anecdotal reports indicated some interest from mills to increase their cotton use, perhaps adjusting the ratio of the fibres in blended yarns to a greater proportion of cotton.

On the other hand, concerns were raised that a prolonged conflict would result in persistently higher inflation and raised interest rates, which could potentially lead to demand destruction regardless of fibre choice as consumers may have less to spend on discretionary purchases such as clothing and home textiles. At the time of writing, negotiations have been attempted but hostilities continue and traffic through the



RUBY MCGRATH

Trade and Markets Reporter, Cotton Outlook



Strait remains disrupted, while the persistent uncertainty has kept oil and associated prices elevated still.

Nevertheless, the changing supply and price dynamics shaped by unforeseen, external events have perhaps indirectly created a chance for the natural fibres sector to accelerate its ongoing efforts to regain market share from synthetics. Man-made fibres have become more and more popular in recent decades but are non-renewable, non-biodegradable and shed microplastics that are now found in oceans, ecosystems, animals, and humans.

As is explored in more detail elsewhere in these pages, a major update in this regard is the **Plant Not Plastic** campaign launched in the US in 2025 by the **National Cotton Council**. The campaign aims to bring the issue of microplastics shed from synthetic fibres to the attention of consumers, who are increasingly concerned about the impacts on our health and the environment, but are often unaware that a large proportion of microplastics come from clothing and home textiles.

Communications through fact sheets and social media posts as well as adverts and television interviews have been used so far to engage with millions of consumers. This campaign may provide a blueprint for similar efforts in other countries, which could lead to a significant shift in shoppers' habits and greater demand for natural fibres as a result.

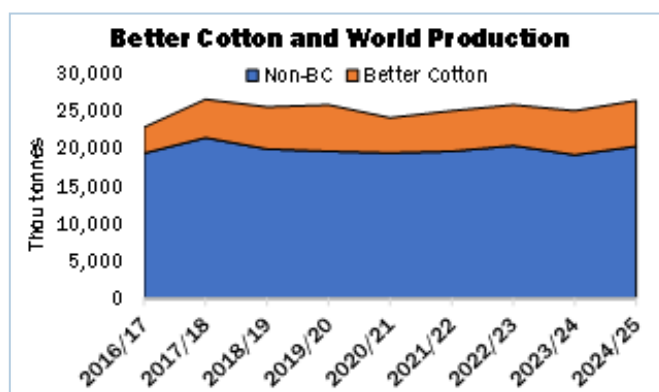
Also in the US, the **Buying American Cotton Act** (BACA) was proposed by the administration as a way to incentivise demand for US cotton. The Act would leverage traceability systems and provide tax credits for products sold in the country that include US cotton. While BACA was introduced to Congress in January (marking the first step in the legislative process), and is reported to have bipartisan support, there is no set timeframe for its passage into law. The White House issued a statement of support for the Act in September 2026, while USDA also unveiled the Great American Cotton Plan, which advocates for BACA and the Plant Not Plastic campaign.

Although the Act has not yet been passed into law, reports of increased interest in US cotton from mills appeared to emerge already, most notably in Vietnam but also in less traditional markets for that origin, such as Bangladesh. In the 2024/25 season, US lint accounted for 37 percent of imports to Vietnam, growing to 50 percent in 2025/26, while in Bangladesh the share increased from seven percent to 12 percent across those seasons.

Meanwhile, the major cotton sustainability initiatives continued to report expansion and new developments over the past year as demand grew for more sustainable, traceable fibres and products, with key themes of regenerative agriculture, soil health, climate change and traceability remaining to the fore.

The largest initiative in terms of output is the **Better Cotton Initiative** (BCI), which operates in many producing countries across the globe. In 2024/25, lint produced under the standard amounted to 6.09 million tonnes, an increase of eight percent on the year, and representing around 24 percent of total world production. The number of farmers licenced to sell BCI cotton amounted to 1.37 million, while the addition of 289 new member organisations brought the total to 2,589. BCI members sourced 2.45 million tonnes of certified cotton in 2024/25.

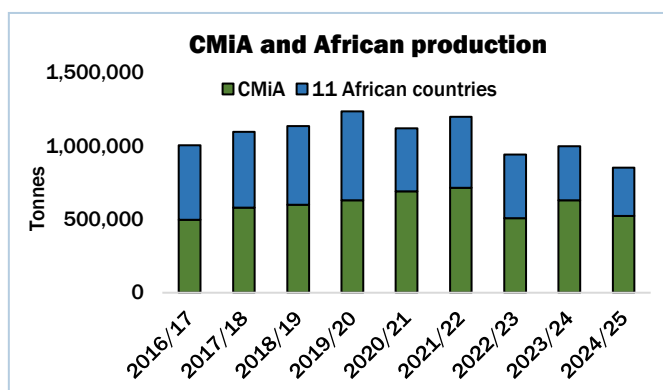
The initiative also conducted an updated global impact report, which revealed improvements across indicators such as soil health and water and pesticide use on its farms, as well as higher net incomes from cotton for many growers in the programme.



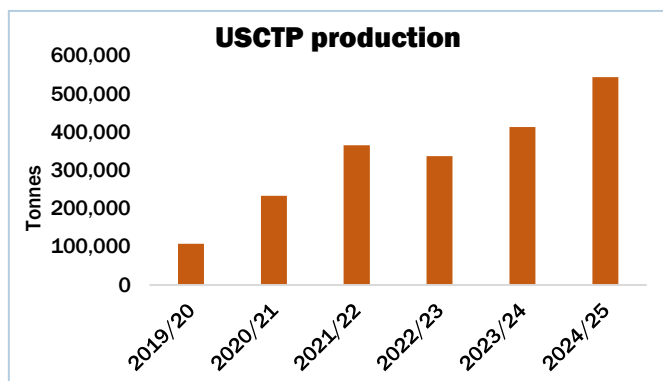
Meanwhile, **Cotton made in Africa** (CmiA) of the Aid by Trade Foundation (AbTF), reported that 522,000 tonnes were produced under the standard by 715,000 farmers in 2024/25, representing around 36 percent of African output, a similar proportion to the previous season. It also reached a milestone of 700 suppliers and producers in 25 countries who can trace CmiA cotton from the product back to its origin, more than double the figure reported in 2023/24.

Other standards have been developed and implemented by AbTF in recent years, which have recorded significant growth. Around 37,000 smallholder farmers were verified under the Regenerative Cotton Standard (RCS) in Tanzania in 2024/25, an increase of 88 percent on the year, while almost 5,000

growers were also verified in India, roughly unchanged. In addition, 25,000 tonnes of cotton were verified under the CmiA Organic standard in that season.



Elsewhere, planted acres under the **US Cotton Trust Protocol** in 2024 totalled 2.1 million, up 24 percent from the previous campaign, while output amounted to 2.5 million bales, an increase of 32 percent. It was also reported that for 2025, 2.58 million acres had been enrolled, while global mill and manufacturer membership rose by 13 percent to 28,000. In the initiative's pilot year in 2019, acreage was 593,000 and production 496,000 bales, demonstrating significant expansion.



Regenagri, a global regenerative agriculture initiative, noted that cotton is the most commonly represented crop in its programme, accounting for 2.13 million hectares across 19 countries last year, a significant 58-percent increase from the previous season. Output totalled 2.1 million tonnes, with Australia, Brazil and India appearing as the largest producers.

Focusing on organic production, **Global Standard** disclosed in its annual report for 2025 that the number of facilities certified under the Global Organic Textile Standard (GOTS) worldwide rose by 15 percent on the year to reach around 17,800 across 95 countries. A new Global Responsible Textiles Standard is set to expand the scope of the Standard's framework beyond organic fibres too.

Organic Cotton Accelerator meanwhile noted that 132,000 tonnes of cotton were produced through its farm programme from 141,000 hectares of land in 2025, both higher than the previous year.

Furthermore, developments have also been reported in providing access to carbon credit markets for growers using sustainable farming methods, offering the potential for additional income streams which may be vital during times of price volatility and to offset costs associated with transitioning to meet sustainability and traceability standards. The **International Cotton Advisory Committee** (ICAC) announced its partnership with several organisations to action such a scheme, with a pilot phase underway in Uzbekistan.

However, as is well argued elsewhere in this feature, it remains problematic that man-made fibres still do not face anywhere near the same level of scrutiny in terms of traceability and sustainability metrics as natural fibres do. Thus, while the progress made year on year by cotton initiatives and producers is highly commendable, it is also vital to press for a fairer playing field across fibres.

A major area of focus in this regard is the range of legislation both in development and already implemented in the European Union. While the goals of improving circularity, reducing waste, and preventing misinformation and unsubstantiated green claims are certainly vital, the methodologies developed have been met with great criticism for using outdated, incomplete or unrepresentative data and unfair scopes and weightings that ultimately favour synthetic fibres.

Some aspects of the legislation have been removed or reduced since they were first announced following reviews that indicated they could be harmful to EU competitiveness and place unnecessary burdens on businesses. Earlier this year, the 'Omnibus' package was approved, simplifying bills including the **Corporate Sustainability Reporting Directive** (CSRD) and the **Corporate Sustainability Due Diligence Directive** (CSDDD) by reducing their scope and extending timelines for implementation, for example.

These Directives focus on rules and requirements for in-scope companies reporting on sustainability aspects of their

operations and supply chains, including environmental and social matters, which may result in growers and manufacturers having to implement systems and capacities to track and disclose a variety of metrics for their downstream customers.

One aspect of EU lawmaking that has drawn much attention from the cotton sector is the **Product Environmental Footprint (PEF)** methodology formulated to be used in various legislation to substantiate green claims and inform requirements. The PEF uses Life Cycle Assessments (LCA) to score the environmental impact of a product, which could then be used by retailers and consumers to inform purchasing decisions. While intended to encourage more sustainable practices, as it stands it could inadvertently disadvantage natural fibres.

The **Make the Label Count (MtLC)** coalition, among others, has highlighted the main concerns surrounding the PEF and has actively campaigned for urgent reforms. It notes the inherent problems associated with comparing different textiles inputs using the same LCA and suggests that the methodology should be improved by including indicators for microplastics, plastic waste, the full impact of fossil fuels used in plastic production, biodegradability and circularity, and social impacts. Without these markers, it ignores their importance and could potentially encourage greater use of synthetic materials that pollute versus natural fibres that are biodegradable and renewable and support millions of livelihoods.

The PEF methodology is set to be used in parts of the **Ecodesign for Sustainable Products Regulation (ESPR)**, among other acts. The ESPR is a framework legislation that lays the foundation for specific rules to be decided over time, and entered into force in July 2024. Part of the ESPR includes the setting of ecodesign requirements for products, which could be informed by the PEF, in order to advance circularity and reduce negative environmental impacts. Textiles were chosen as a priority by the Ecodesign Forum for having high potential for improvements, and a Delegated Act for textiles is expected in 2027.

MEPs from the European Parliament's Sustainable Textiles Working Group have recently called for sustainably sourced

renewable materials (SSRMs) to be properly recognised and included in the Delegated Act for textiles to avoid the unfair treatment of natural fibres, a call that has been supported by MtLC.

Meanwhile, a ban on the destruction of unsold goods entered into force in July this year, with the intention of reducing waste and increasing reuse and recycling. Waste has been an increasing issue for clothing particularly with the expansion of fast fashion that is often made from non-biodegradable polyester that ends in landfill.

A key aspect of the ESPR is the upcoming **Digital Product Passport (DPP)**, scannable codes that will be required on textiles and apparel tags that can be used to access detailed product information and sustainability attributes, either by consumers to inform purchasing decisions, or by public authorities to verify compliance. The data may include carbon footprint, water consumption, durability, repairability or recyclability, which may be scored using PEF methodology. Therefore, natural fibre representatives have been urgently campaigning for the reforms necessary to ensure the information presented is fair and transparent, before the DPP is mandated.

Some organisations such as Cotton Incorporated (detailed in Jesse Daystar's highly informative contribution to this feature), Textile Exchange, and Regenagri have recently developed their own LCAs for cotton and other fibres, with the aim of providing more accurate, up to date and representative data regarding sustainability metrics, thereby demonstrating that better alternatives to the original PEF are possible, and necessary.

To summarise, there have been a multitude of developments concerning cotton sustainability over the past year, in terms of advocacy, initiatives and standards, and legislation. While volatility in the market has been elevated, positive developments have been apparent as a result of great efforts by the sector. While the outlook remains uncertain in terms of demand and prices, legislation, and the effects of climate change, there are also opportunities for cotton to expand its work in combating misinformation and highlighting its many inherent attributes.

EVERY FIBRE HAS A STORY: HOW THE AID BY TRADE FOUNDATION NAVIGATES GLOBAL SUPPLY CHAIN DYNAMICS AND DRIVES MARKET AND FIELD-LEVEL IMPACT

Over the past two decades, the Aid by Trade Foundation (AbTF) has driven progress in the cotton sector towards ecological and social responsibility. Founded in 2005 by Prof. Dr Michael Otto, the foundation has made a decisive and measurable contribution to protecting nature, improving working conditions, and promoting responsibly produced cotton. At the heart of these efforts is a robust family of standards: Cotton made in Africa® (CmiA), Cotton made in Africa Organic, and the Regenerative Cotton Standard® (RCS). By successfully leveraging market forces, AbTF provides global retailers and brands with the standards to meet increasingly stringent ESG requirements, while reinvesting its revenues from licences directly into the cotton-growing regions, supporting biodiversity projects, regenerating nature and creating social justice in small-scale farming.

MARKET AND SUPPLY CHAIN DYNAMICS: MEETING THE DEMAND FOR TRACEABILITY AND SUSTAINING GROWTH

In today's highly dynamic market, shaped by rising regulatory requirements, fashion brands and retailers require scalable and secure sourcing solutions. AbTF's cotton standards stand out for their ability to continuously strengthen their position within these complex global supply chains. A key driver of this success is the provision of transparency-focused traceability systems. Backed by



Aid by Trade Foundation

regular independent third-party verifications, these tracking systems enable partners to trace the raw material back to the growing region, allowing them to fulfil their due diligence obligations and comply with international regulations.

Meeting tomorrow's regulations today is the declared goal of the Transparency Standard introduced by the Aid by Trade Foundation in 2025. Serving as the current benchmark for traceability in the textile supply chain, the Transparency Standard is based on the established AbTF tracking system, enhanced by an innovative, multi-layered control

architecture: Digital Transaction Documents (DTDs) validated by independent auditors ensure that CmiA, CmiA Organic, and RCS cotton can be tracked throughout the supply chain. Even a single missing data entry prevents a DTD from being issued. In addition to mandatory onboarding audits for spinning mills, risk-based desktop audits are conducted by independent auditors. They verify entered data at all stages of production, including related documents such as production reports and delivery notes. This lends even greater credibility to CmiA, CmiA Organic, and RCS-labelled products, making the Transparency Standard a milestone in the development of tools to fulfil supply chain due diligence obligations.

The demand for AbTF verified raw materials is rising. Today, 64 international retail partners and fashion brands drive the demand for AbTF's cotton standards. In 2025 alone, the network of CmiA and CmiA Organic partners along the entire supply chain grew by nearly four percent, reaching a total of 2,800 partners across 50 textile production markets worldwide. This connects agricultural producers directly to a powerful international network. Revenues generated through these standards are consistently channelled back to the origin—reinvested in biodiversity projects, supply chain transparency, and the continuous roll-out of the verification system.

IMPACT AT ORIGIN: EMPOWERING COTTON- GROWING COMMUNITIES AND SOILS

While market integration is vital, the ultimate success of these standards is measured directly on the field. Today, AbTF's standards support a rapidly growing network of small-scale farmers in Africa South of the Sahara, which has expanded from around 100,000 in 2005 to 715,000 across ten countries. Currently, 36.4 percent of all cotton produced in Africa is CmiA or CmiA Organic-verified.

To future-proof these farming communities against climate and market shifts, AbTF focuses on tangible field-level interventions:

Restoring Soil Health: Recognizing that fertile soil is a farmer's most critical ally, AbTF supports projects promoting biochar, compost, crop rotation, and integrated

pest management. In Côte d'Ivoire, soil improvement measures on demonstration plots achieved yield increases of up to 37 percent compared to conventionally farmed plots.

Combatting Climate Change by Creating New Sources of Income for Small-Scale Cotton Farmers: Making cotton cultivation climate-resilient is a key goal of all the Aid by Trade Foundation's cotton standards. The way small-scale growers live and produce cotton contributes little to climate change. Paradoxically, the consequences of global warming are now an existential threat to many farmers. For this reason, AbTF is supporting a project in Cameroon, implemented by the International Cotton Advisory Committee (ICAC), Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, and other partners who, in collaboration with bizpando AG, aim to promote access to carbon credits in cotton production. The goal is to enable small-scale farmers to improve soil quality, sequester CO₂, and make the carbon credits market accessible to growers through digital technology.

Empowering Women and Local Communities: In Côte d'Ivoire, a multi-year project running until 2027 trains women to generate income by producing and selling compost, biochar, and bokashi. Supported by newly established savings and loan groups, these women gain access to credit for education, housing, and agricultural inputs, raising their social status while improving family health and food security.

Expanding Organic and Regenerative Standards: The CmiA Organic standard, which combines organic verification with social and economic support, now reaches around 43,000 small-scale farmers in four African countries - a 32 percent increase compared to the previous year. Meanwhile, the newly launched Regenerative Cotton Standard (RCS) has expanded into India and Tanzania, with Tanzania seeing an 87 percent year-on-year increase in RCS farmers in 2025.

Closing the Sourcing Loop in Benin: In 2025, AbTF joined a consortium project in Benin alongside GIZ, PAN UK, OBEPAB, Reinhart, and SODECO. This project supports small-scale farmers transitioning to organic cotton. Rather than exporting unprocessed

fibres, Benin now processes locally grown CmiA and CmiA Organic cotton into finished textiles domestically. This shortens the global supply chain, creates local jobs, and keeps value creation within the country.

The Community Cooperation Programme (CCCP): Another key component of Cotton made in Africa's work in supporting cotton communities is the CmiA Community Cooperation Programme (CCCP). Designed by local partners and implemented with the help of smallholder communities, every

newly drilled well, newly built school and health station, and supported women's club contributes to improving the living conditions of rural cotton communities.

By linking robust global market demand with transformative field-level projects, Cotton made in Africa, the Regenerative Cotton Standard, and Cotton made in Africa Organic continue to secure both the future of cotton farming and the livelihoods of the people who make it possible.

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GENUINE TRACEABILITY IS BECOMING THE INDUSTRY'S NEXT FRONTIER

World Cotton Day, marked each October 7, has traditionally been a moment to celebrate cotton's economic and social importance across the countries and communities that grow it. This year, that celebration sits alongside a quieter but consequential shift in the industry: the move from claiming where cotton comes from to being able to prove it.

For decades, origin claims in the cotton supply chain have rested largely on documentation. Certificates of origin, contracts, and supplier attestations have long formed the backbone of how brands, mills, and traders represent where their raw material was grown. That system worked reasonably well when trust between trading partners was high and supply chains were short. It is under considerably more strain now, and buyers, compliance teams, and consumers alike are asking a more pointed question: if you claim it, can you prove it?

WHAT IS GENUINE TRACEABILITY?

That question is precisely where our company name comes from. GenuTrace stands for Genuine Traceability. Much of what passes for cotton traceability in apparel today is digital only: a blockchain entry, a supplier declaration, a QR code linking to a database record. These systems move claims efficiently, but are only as trustworthy as the information entered at the start. If a claim about where a fiber was grown was never physically verified, digitizing it simply makes the unverified claim easier to circulate.

Genuine cotton traceability means verifying the actual material itself, not just the paperwork describing it, from fiber all the way through to



MEILIN WAN

Founder & CEO, GenuTrace LLC

finished product, and connecting that physical verification to the digital record that follows the material downstream. Physical authentication confirms what a batch of cotton actually is and where it came from. Digital traceability then carries that verified information forward through the yarn, fabric, and finished garment, so a claim on a label traces back to a physical fact.

Digital product passports are becoming a central piece of that digital layer. As regulators, particularly in the EU, move toward requiring product-level digital records that travel with a garment, brands will need something credible to populate them with. A digital product passport is only as trustworthy as the data behind it, and forensic origin verification gives

that data a physical anchor: the passport reports what was confirmed in the material, not just what a supplier claimed.

Our Origins program puts this into practice: physical authentication from farm to gin to spinner to fabric, layered with digital records, including digital product passports, that track movement along the supply chain.

Our mantra, “Trace it before you make it”, captures this. Physical verification of the cotton itself, using forensic methods such as cotton isotope testing, genomic testing, and other marker technologies, is connected at every stage of the supply chain, in combination with digital traceability systems.

COTTON ORIGIN VERIFICATION: WHERE FORENSIC SCIENCE FITS

Cotton origin verification remains a core method in that toolkit. It measures naturally occurring isotopic ratios in cotton fiber and compares them against a reference library built from cotton grown in known regions, providing a scientific basis for assessing whether a sample matches its claimed origin.

It’s worth being precise about what cotton origin testing does and does not tell you on its own. Results show how closely a sample’s isotopic signature matches cotton grown in the claimed region, rather than a simple pass or fail. That precision matters, which is part of why we built a broader risk assessment and due diligence practice alongside our testing services, considering a wider set of supply chain risk factors than a single isotope result can address.

We have also been advancing complementary physical tools this year, including a pilot protocol for DNA-based molecular tagging of cotton, applying a unique synthetic marker in the field and verifying its presence through PCR-based detection at the gin. DNA tagging offers a complementary kind of proof to isotope testing: a physical marker applied at a known point in the supply chain that can be tracked forward. Layered with digital traceability, these methods build a more complete picture of origin than any single test provides alone.

COTTON TRACEABILITY IN THE MARKET TODAY

Over the past year, we have worked with

several apparel brands and retailers running cotton traceability pilots, testing how physical and digital traceability integrate with existing sourcing and compliance workflows. A consistent theme has emerged: brands want genuine traceability built into how sourcing decisions get made, rather than treated as paperwork collected after the fact.

That shift is, in many ways, the more important story for World Cotton Day this year. Cotton growing regions around the world, from West and Central Africa to Central Asia, the Indian subcontinent, and the Americas, each have a story to tell about the cotton they produce. Genuine traceability gives those regions a credible way to tell that story with proof rather than paperwork.

THE ROAD AHEAD FOR SUPPLY CHAIN TRACEABILITY

None of this suggests documentation is going away, nor should it. Certificates, contracts, and audit trails remain essential to how supply chains are managed day to day. What is changing is the expectation that documentation can be backed by physical proof and connected digitally, including through emerging tools like digital product passports. Globally, legislation is moving toward greater supply chain visibility and accountability, and cotton traceability that combines physical and digital proof is likely to become the norm rather than the exception.

World Cotton Day is a moment to recognize the scale and importance of the cotton industry worldwide. It is also a moment to recognize that trust in where cotton comes from cannot rest on claims alone. Trace it before you make it: the brands, mills, and testing providers who build genuine traceability into sourcing programs now will be best positioned to meet that expectation as it grows.

MeiLin Wan is the Founder and CEO of GenuTrace LLC, a boutique consultancy focused on supply chain traceability, forensic verification, and digital authentication. The firm empowers brands, retailers, and manufacturers to verify material origin using multi-proof, science-based systems, from laboratory analytics to digital product passports, across cotton and other natural materials.

I grow the future.

Ricky Bradford, Staplcotn
member for 6 years.



For more than a hundred years, Staplcotn has represented farmers who grow cotton for a living. But to them, it's more than a way to provide for their families; it's a part of their DNA. Their legacy is built on care, hard work, and connection to the land.

Today, Staplcotn has more than 5,000 grower/members who produce high quality Memphis/Eastern upland cotton and are guided by responsibility, rooted in tradition, and committed to future generations. We are honored to be a part of their story.

To learn more about Staplcotn, our growers who are at the heart of the cooperative, and how we are advancing sustainable and regenerative practices of U.S. cotton in the textile supply chain, visit www.staplcotn.com.



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