



COTTON USA™
THE COTTON THE WORLD TRUSTS

GLOBAL STUDY FINDS U.S. COTTON IS PREFERRED

MILL/MANUFACTURER BENCHMARKING STUDY RESULTS



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GLOBAL STUDY FINDS U.S. COTTON IS PREFERRED

The United States exports more than three times more cotton than its next closest competitor and achieved a 40% share of cotton fiber exports in the latest marketing year. To better understand how the U.S. industry maintains their high share of exports, it is important to understand the factors driving it from the customer perspective. To provide further insight into the perspective of U.S. cotton customers, a research study of mill and manufacturer representatives from around the world was conducted. Findings suggest that U.S. cotton's quality reputation is superior to cotton from other regions of the world.

In March and April 2017, a third-party research firm conducted an assessment of the cotton industry and Cotton Council International's (CCI) role in the industry by reaching out to 228 mill and manufacturer representatives to gain insight into their purchase decisions as well as perceptions toward U.S. cotton and the COTTON USA brand. Representatives spanned 18 countries including the six largest cotton purchasing regions in the world; Northeast Asia, Southeast Asia, South Asia, China, Latin America, and Central Europe.

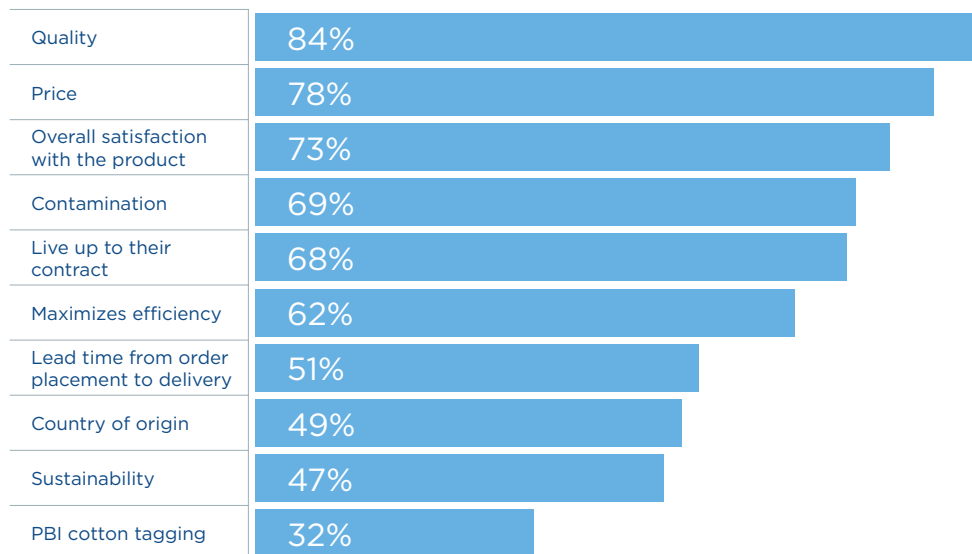


IMPORTANCE OF PURCHASE FACTORS

Respondents were first asked to rate the most important factors in their cotton purchase decisions. Across regions the top five factors in the cotton purchasing decision were quality, price, overall satisfaction with the product, contamination, and living up to their contract.

Respondents were then asked to rate their associations with cotton from various parts of the world. While U.S. cotton is not the lowest cost, U.S. cotton was most highly associated with all other top factors in the decision to purchase cotton.

IMPORTANCE OF PURCHASE FACTORS



OVER 91% OF RESPONDENTS WOULD RECOMMEND U.S. COTTON

Nearly 90% of respondents perceived U.S. cotton as high quality, consistent, and low contamination and three-quarters believed U.S. cotton provides good value despite the higher price point. U.S. cotton was consistently rated more positively than cotton from other parts of the world across all significant purchase factors.

Factors	Cotton from United States	Cotton from Brazil	Cotton from Australia	Cotton from India	Cotton from Africa
Respected	95%	25%	77%	15%	19%
Reliable	93%	21%	83%	11%	12%
Trustworthy	93%	25%	79%	8%	15%
Dependable	92%	24%	71%	11%	13%
High Quality	89%	23%	76%	12%	13%
Consistent	89%	23%	71%	12%	14%
Low contamination	88%	31%	80%	4%	7%
Premium	84%	21%	72%	11%	13%
Good value	75%	29%	54%	28%	21%

MORE PREFERRED

Given the positive associations with U.S. cotton it should not be surprising that U.S. cotton was overwhelmingly the preferred cotton for all respondents, as over 50% of respondents preferred U.S. cotton, more than four times higher than cotton from any other country.

Not only is it strongly preferred by mills and manufacturers around the world but purchase behavior backs up the superiority of U.S. cotton. Over one-third of the cotton reportedly purchased in the past year was from the U.S., nearly three times higher than cotton from any other country.

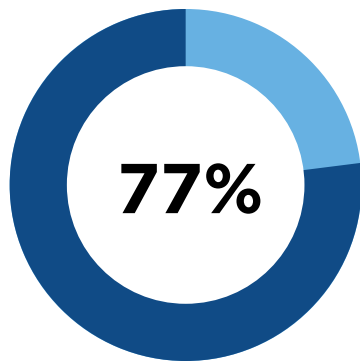
In addition, respondents were very satisfied with their U.S. cotton purchases as over 90% indicated that they would recommend U.S. cotton to their customers.



COTTON USA BRAND

Respondents were also asked about their awareness and perceptions of the COTTON USA brand. Since 1989 Cotton Council International (CCI) has licensed products such as apparel and home textiles with the COTTON USA trademark and in that time more than 51,000 product lines and 3.8 billion products have used this trademark.

In light of this long track record, 96% of mill and manufacturer representatives were aware of the COTTON USA brand. **More importantly, 77% indicated that the COTTON USA trademark adds value to their business.**



The COTTON USA™ Mark
adds value to my business.
(Top 2 Box Score – Strongly/Somewhat Agree)

CONCLUSION

Overall, findings of this research study point to the fact that U.S. cotton is the cotton preferred by mill and manufacturers around the world. Despite the higher price point, mills and manufacturers purchase more U.S. cotton than cotton from any other country because of the high quality.

The high quality of U.S. cotton product is projected in the COTTON USA trademark, which adds value to cotton products by projecting an image of quality, comfort, and trust.

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CCI is an EEO employer.

