



Together we make a world of difference.

**The Global Organic Cotton Market:
From Field to Fashion**

Farm Development Mtg. 2006

September 11, 2006

ICCO Center

Utrecht, The Netherlands



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Overview

1. Why organic?
2. What's happening now?
3. What drives success?
4. How can my company get involved?





Organic cotton is...

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- grown without synthetic chemicals, fertilizers or genetic modification
- beneficial to the environment
- beneficial to farmers their families and their communities





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Farmers from North America....



To Africa...



....and India





...and their families and communities benefit from the transition to organic

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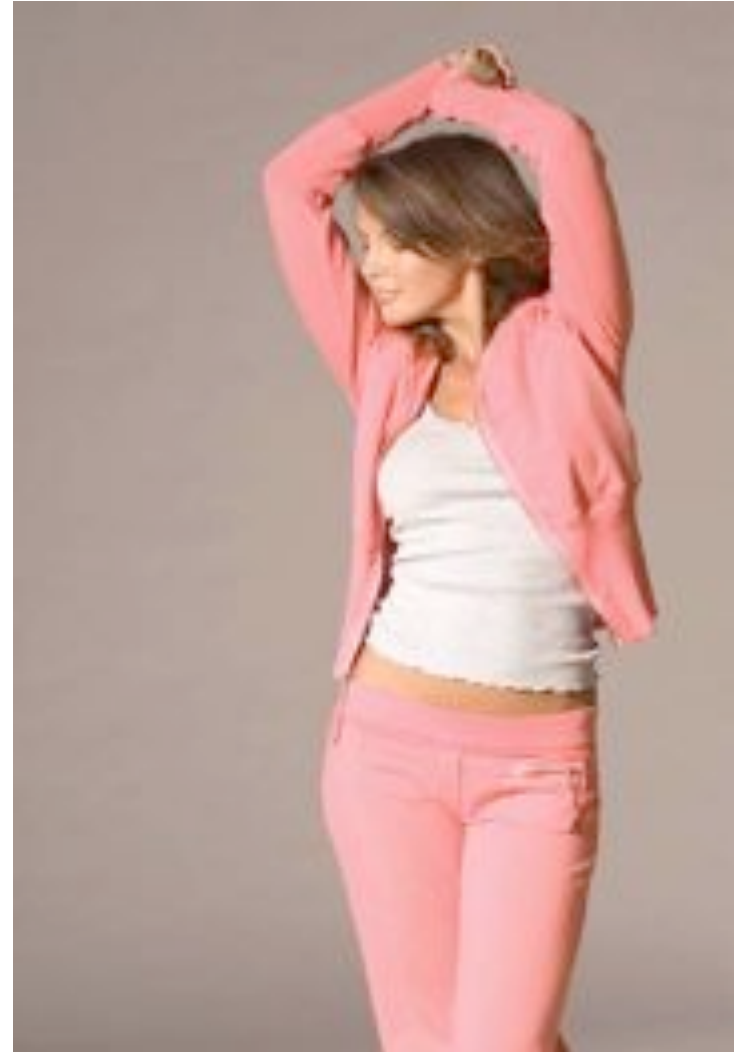


What's happening now?

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*“ Food tipped first.
Then came cars.
Now comes fashion.”*

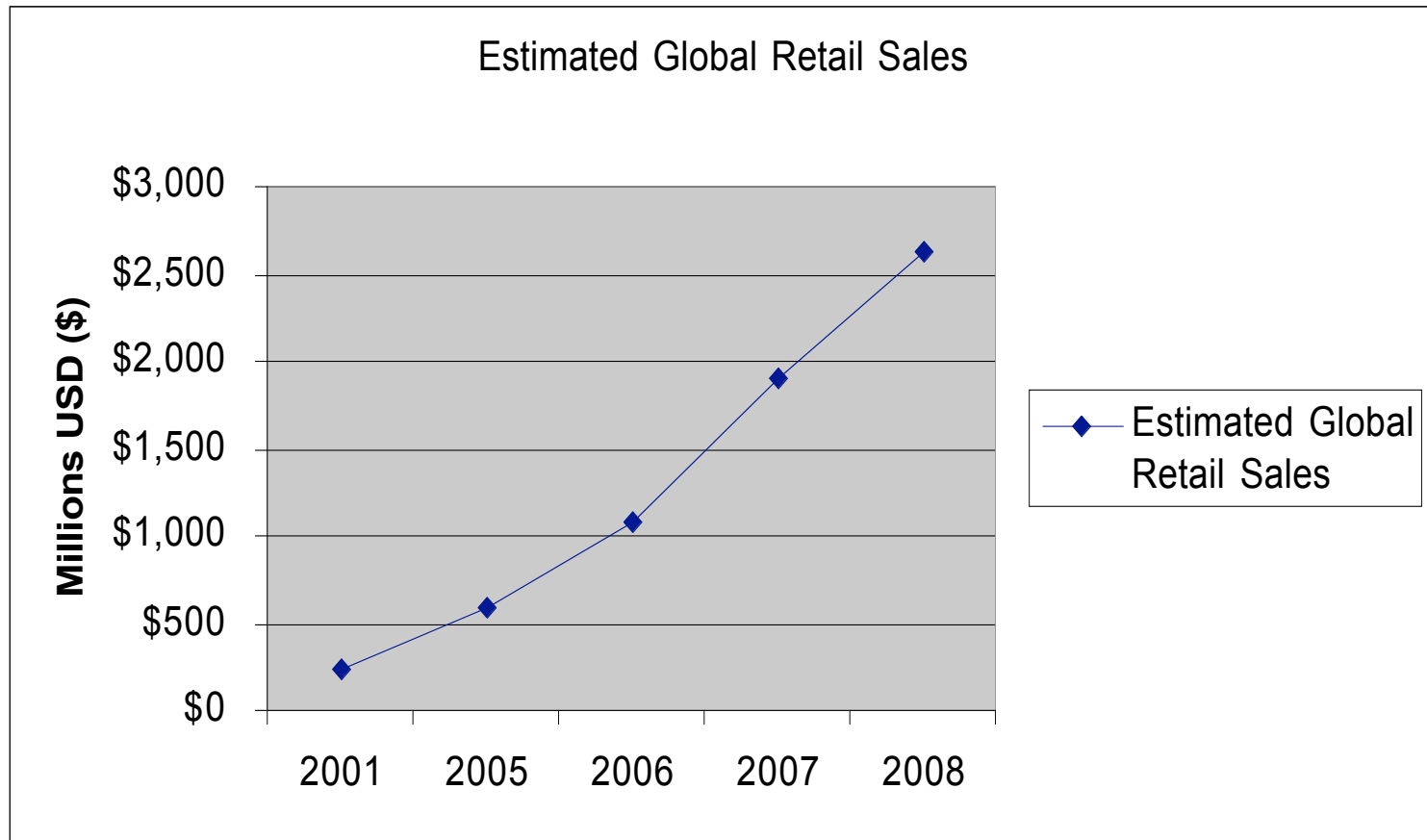
Danny Seo





Global Organic Cotton Products Market is Growing Rapidly

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Who's in the market?

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In 2005:

More than 30 international retailers and brands had significant organic cotton programs. More than 1200 small and medium sized companies were also in the market.

The largest brand programs:

- Nike
- Coop Switzerland
- Patagonia
- Otto
- Sam's Club/Wal-mart

Other significant retailers and brands included: Edun, Eileen Fisher, H&M, Hanna Andersson, Marks & Spencer, Mountain Equipment Coop, Nordstrom, Prana, REI, Under the Canopy, People Tree (UK and Japan), Whole Foods, Woolworth's South Africa, Howies (UK)

2006 entrants included Cotton Ginny, Levi Strauss

2007 will see Next, Reebok, and other significant brands and retailers





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Who's Designing?

- Katherine Hamnett
- Rogan Gregory
- Linda Lauder milk
- Stella McCartney
- Diane Von Furstenberg
- And more....

Over the past 5 years, the number of design students in UK universities researching and using organic cotton has gone from 1-2 to several dozen each year. MBA graduate students are starting companies these designers can work for.





Who's Talking About and Wearing Organic?

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- Ali Hewson and Bono
- Darryl Hannah
- Carmen Diaz
- Woody Harelson
- Fashion writers
- Elle, Vanity Fair, etc.





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What's available?

- More organic fabrics
 - Cotton
 - Wool
 - Hemp
 - Linen
 - Other natural fibers (e.g. silk, cashmere)
- More renewably based fabrics
 - Lenzing
 - Soy
 - Bamboo
 - PLA
- More blends
- Innovations in dyes and finishes
- Links with home and beauty





What drives success in the organic market?

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1. Know how much you use
2. Set a long term transition goal
3. Align your organic strategy with your brand strengths
4. Make commitments to your suppliers
5. Ask for commitments from your suppliers to the farmers
6. Be transparent and track and trace
7. Report your progress and tell the story behind the product





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What can you do to become involved?

- Learn more
 - www.organicexchange.org
 - Farming facts and statistics
 - Market facts and statistics
 - Sourcing guide
 - Searchable database
 - Consumer and Business Market Pages
 - OE Regional Supply Chain Meetings:
 - India, November 2006
 - Africa, South America and India 2007
 - OE 2007 Annual Conference and Marketplace
 - October 2007 San Francisco
- Talk with customers and business partners to find right fit
- Get started!