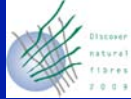


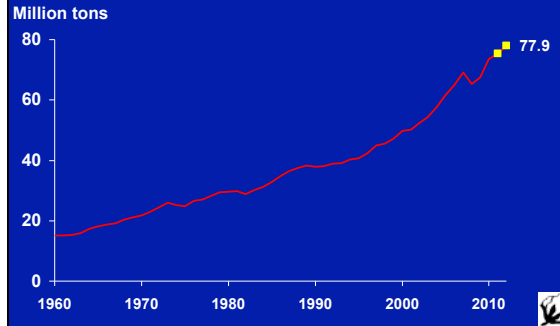
Urgent need to promote cotton consumption at retail level



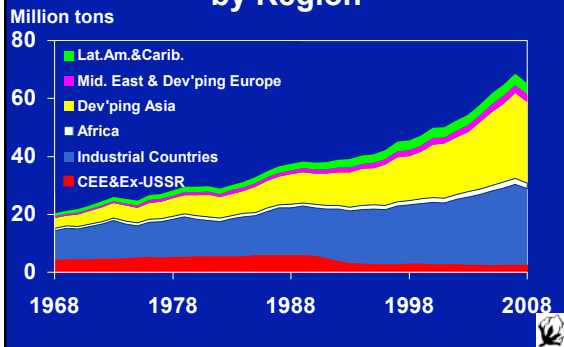
Alejandro Plastina, ICAC
3rd Breakout Session on
Demand Enhancement
September 8, 2011



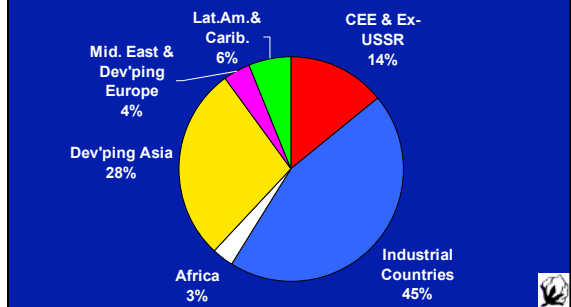
World End-Use Textile Fiber Consumption



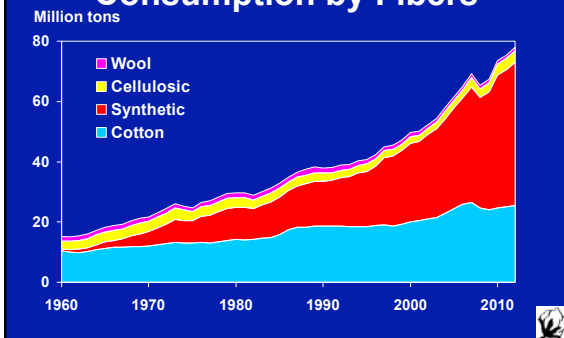
End-Use Textile Fiber Consumption by Region



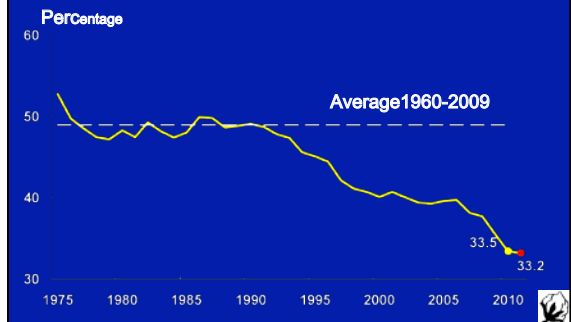
End-Use Textile Fiber Consumption by Region - 1990



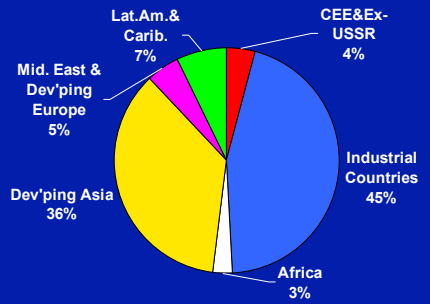
World End-Use Textile Fiber Consumption by Fibers



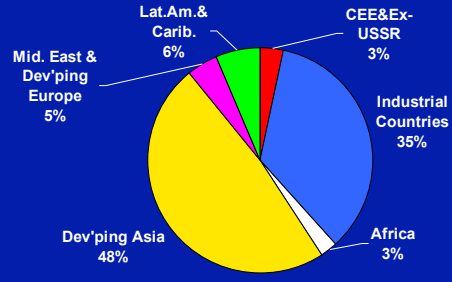
Market Share of Cotton in World Textile Fiber Consumption



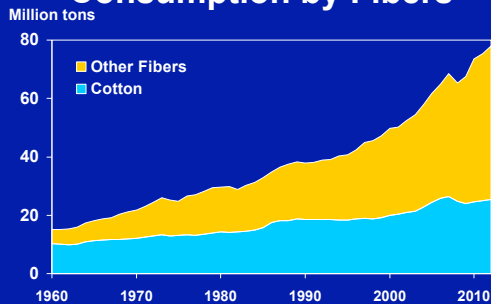
End-Use Textile Fiber Consumption by Region - 2000



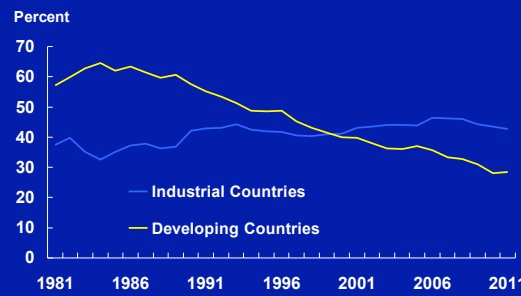
End-Use Textile Fiber Consumption by Region - 2010



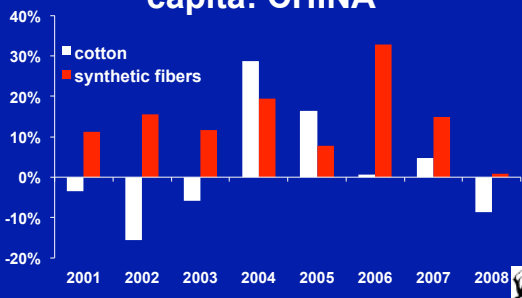
World End-Use Textile Fiber Consumption by Fibers



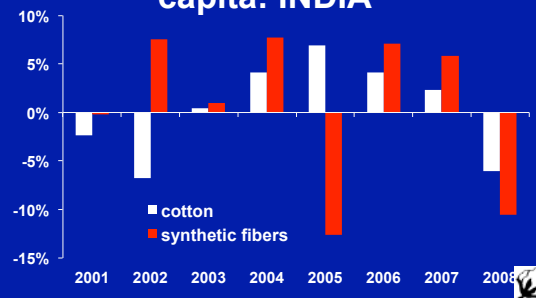
Cotton's Share of End-Use Textile Fiber Consumption by Regions



Annual growth in cotton and synthetic fiber consumption per capita: CHINA



Annual growth in cotton and synthetic fiber consumption per capita: INDIA



Conclusion

- URGENT NEED TO ENHANCE PROMOTIONAL EFFORTS AT RETAIL LEVEL
- IN PARTICULAR, IN DEVELOPING COUNTRIES

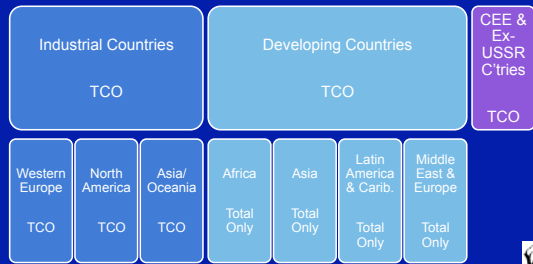


ICAC Textile Model



World Textile Demand

Total, Cotton and Other Fibers (TCO)



ICAC Textile Model

Textile Fiber Demand as a function of:

- GDP
- Population
- Prices of cotton and other fibers
- Inflation

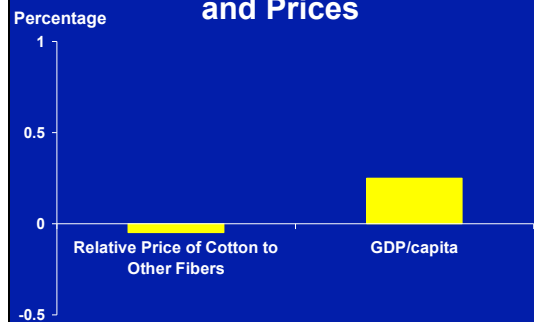


ICAC Textile Model

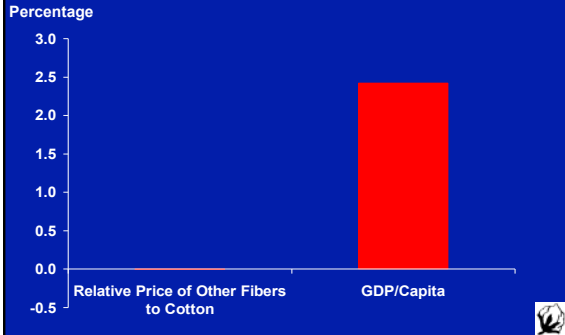
| Variable | Total Textile Fiber Consumption | Cotton Consumption | Other Fiber Consumption |
|--|---------------------------------|--------------------|-------------------------|
| Real GDP/capita Index | + | + | + |
| Population | + | + | + |
| Real Price of Textile Fibers Index | - | | |
| Relative Price of Cotton to Other Fibers | | - | Almost null |



Sensitivity of World Cotton End-Use Consumption to Income and Prices



Sensitivity of World Consumption of Other Fibers to Income and Prices



ICAC Textile Model: Result 1

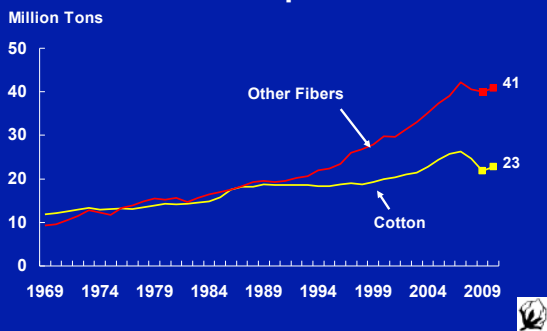
- **↑ GDP/capita:**
 - ↑ Cotton Use < ↑ Use of Other fibers
 - ↓ Market Share of Cotton

ICAC Textile Model: Result 2

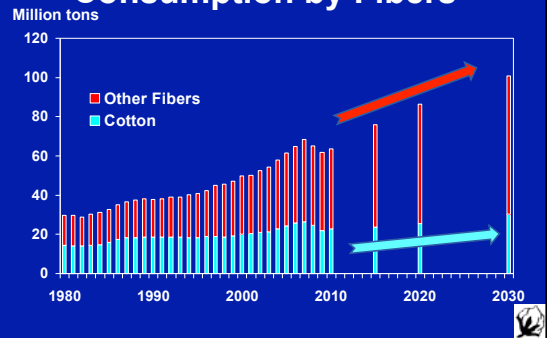
- **↓ Relative Price of Cotton to Other Fibers:**
 - ↑ Cotton Use and ↓ Use of Other fibers
 - ↑ Market Share of Cotton

Forecasts

World End-Use Textile Fiber Consumption



World End-Use Textile Fiber Consumption by Fibers





**International Cotton Advisory
Committee**