

# SUSTAINABLE COTTON RANKING 2017



**Solidaridad**



ASSESSING COMPANY PERFORMANCE







Ministry of Foreign Affairs



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# ACRONYMS

<b>ABR</b>	Algodão Brasileira Responsável / Responsible Brazilian Cotton
<b>BCI</b>	Better Cotton Initiative
<b>CmiA</b>	Cotton made in Africa
<b>GRS</b>	Global Recycle Standard
<b>HHP</b>	Highly Hazardous Pesticides
<b>IFOAM</b>	International Federation of Organic Agriculture Movements
<b>IMO</b>	Institute for Marketecology
<b>ISU</b>	The Prince of Wales' International Sustainability Unit
<b>myBMP</b>	Best Management Practices, Australian cotton standard benchmarked to BCI
<b>OCA</b>	Organic Cotton Accelerator
<b>PAN UK</b>	Pesticide Action Network UK
<b>RCS</b>	Recycled Claim Standard
<b>SAC</b>	Sustainable Apparel Coalition
<b>WWF</b>	World Wide Fund for Nature (World Wildlife Fund in North America)



# INTRODUCTION

Used in hundreds of everyday items, from clothes and bed linen to mattresses, towels and even bank notes, cotton is ever present in our lives. It is a key raw material for the textile industry and represents about 30% of all fibre used in the sector<sup>1</sup>. Globally, around 30 million hectares are planted with cotton<sup>2</sup>, accounting for more than 2% of total arable land<sup>3</sup>, and producing approximately 25 million<sup>4</sup> metric tonnes (MT) of cotton annually. Grown in around 80 countries, more than 100 million households around the world are directly engaged in cotton cultivation<sup>5</sup>, relying on it for their income.

## SUSTAINABLE COTTON...

Cotton cultivation is associated with numerous social, economic and environmental challenges that threaten the sector's sustainability. A number of global initiatives have been launched to address these, either fully or partially (see page 3 - *Sustainable Cotton*). Cultivation of more sustainable cotton has never been higher than it is today, reaching 2.6 million tonnes in 2015/16, around 12% of total global supply. However, only just over a fifth (21%) of this amount is actively sourced as more sustainable cotton by companies with the remainder traded as conventional cotton. Current forecasts are for more sustainable cotton to be at least 15% of global cotton production in 2017.

Companies that rely largely on cotton as a raw material play a crucial role in securing the future of the sustainable cotton market, reducing cotton's environmental impacts and

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1. ICAC, 100% of 100 Facts About Cotton, retrieved on 27 April 2017

2. International Cotton Advisory Committee (ICAC) Press Release, 14 November 2016 and 1 February 2017.

3. FAOSTAT, retrieved on 27 April 2017.

4. Average over the last ten years.

5. Fortucci P. (Director, Commodities and Trade Division, FAO). 2002. Speech at the Seminar on Cotton and Multilateral Trade Negotiations organised by ICAC and the World Bank, July 2002.



improving labour conditions. Some have made public time-bound commitments to more sustainable cotton sourcing and report steady progress in actual uptake of sustainable cotton. Yet many of the world's largest companies using cotton as a key raw material do not consider or address the negative impacts of its production.

## ...REQUIRES MARKET UPTAKE

Pesticide Action Network UK (PAN UK), Solidaridad and WWF share a vision for a more sustainable cotton sector and have been involved in various cotton sustainability initiatives for more than two decades. Up until now, our emphasis has been on increasing the cultivation of more sustainable cotton. With a significant supply now available (see page 5 - Sustainable cotton market: supply and uptake), we have shifted our focus to strengthening demand and market uptake of more sustainable cotton.

While growing more sustainable cotton delivers numerous non-financial benefits for cotton producers and the environment, without demand from buyers, more sustainable cotton will remain a niche product and the cotton sector's social and environmental problems will persist.

Mainstreaming more sustainable cotton requires more than a few leading companies, however large or progressive, doing all the heavy lifting. Most of the largest companies in every major consumer market around the world that use significant volumes of cotton in their products will need to commit to sourcing more sustainable cotton if it is to become the norm. Large public sector buyers will also need to take similar steps.

All cotton sustainability standards or programmes rely on market uptake to finance and deliver positive impact - be it premiums paid directly to cotton farmers in Organic and Fairtrade cotton, license fees under the Cotton made in Africa (CmiA) system, or volume based fees in the Better Cotton Initiative (BCI) system funding farmers support programmes. For sustainable cultivation to thrive, the business case must be clear for producers. In our view, consistent and growing demand for more sustainable cotton and increased sourcing and uptake from buyers will make the best business case and secure a lasting future for the sector.

“ 12-15% of cotton is grown sustainably, yet only around a fifth of this is actively sourced by companies as sustainable. ”

## ...TO TRANSFORM THE SECTOR

Our overall objective is to highlight progress achieved and opportunities for improvement that will accelerate transformation of the cotton market towards sustainability. We want to engage a wider audience and stimulate demand, therefore we have increased the number of companies assessed in the 2017 Cotton Ranking and included companies in major emerging markets.

More specifically, this second edition of the ranking provides:

-  an update on the market for more sustainable cotton (cultivation and uptake);
-  an update on company performance compared to the previous year;
-  a performance assessment of an expanded list of companies from around the world.



# SUSTAINABLE COTTON

Cotton is grown in around 80 countries. Cotton farming systems vary hugely across different geographies, with mechanised large-scale cultivation in countries such as the USA, Australia and Brazil, and small-scale labour-intensive cultivation in, for example, India and Mali.

## SUSTAINABILITY CHALLENGES

Conventional cotton cultivation is characterised by interconnected environmental, social and economic challenges that threaten the sector's overall sustainability.

In 2009, cotton accounted for 6.2% of total global pesticide sales and 14.1% of insecticide sales for all crops<sup>6</sup>. The use of highly toxic pesticides, as well as the overuse and misuse of pesticides in general, can have a dramatic effect on the health of farmers and their communities, as well as ecosystems.

Overuse of synthetic fertilisers also causes loss of soil fertility and soil acidification.

Pressure on land and land clearance cause environmental impacts such as soil erosion, soil contamination, and biodiversity loss.

Globally, 73% of cotton cultivation relies on irrigation, and water use can be significant. The global average water footprint of seed cotton is 3,644 cubic metres per tonne<sup>7</sup>, the equivalent of nearly 1.5 Olympic swimming pools.

Cotton is also a crop with extensive use of genetically modified (GM) seed, mostly "Bt cotton", though herbicide resistant cotton is popular in the US. A majority of small-holder and large mechanised farms use such GM seeds.

Social challenges include poor working conditions, with concerns over the incidence of child labour and forced labour in some major cotton-producing countries. As of September 2016, the US Department of Labor reported the existence of child or forced labour related to cotton cultivation in 18 countries, including eight (India, China, Pakistan, Brazil, Uzbekistan, Turkey, Turkmenistan and Burkina Faso) of the top ten producer countries responsible for over 80% of global cultivation annually.

A lack of gender equity, a common problem in the agricultural sector, is holding back inclusive development in cotton farming communities.

In economic terms, farmer incomes are subject to global market volatility. Already low incomes are under constant threat and may fall further. When world cotton prices declined by 40% in the season 2001/02, rural poverty in cotton-growing regions of Benin, for example, increased by 8%<sup>8</sup>.

Global trade structures are generally unfavourable for farmers. And many farmers are in debt due to the heavy use of costly inputs (pesticides and fertilisers).

All these factors contribute to perpetuating poverty for many cotton farmers.

Despite these challenges, cotton still provides farmers with a cash income that pays for building material, school fees, and other household necessities. If produced sustainably, cotton can give millions of cotton farmers worldwide extra income and help them improve their lives.

## MORE SUSTAINABLE OPTIONS

Sustainability standards and programmes aim to address the challenges associated with conventional cotton cultivation. They provide guidance for farmers on more sustainable farming practices and assure buyers that the product meets specified requirements. Although not the only way to increase sustainability, such standards provide an immediate first step that all companies can take.

Each standard brings something different to the table, both in terms of the standards themselves and the systems supporting them. While Organic cotton focuses on environmental implications and Fairtrade focuses on the social aspects of cotton farming, CmiA and Better Cotton cover both environmental and social dimensions, though CmiA is limited in geographical scope to Sub-Saharan Africa.

While sustainability can be pursued outside the framework of a standard, sustainable cultivation standards are a powerful tool connecting sustainable farming practices, market demand and claims. As this report focuses on market demand and the role of companies in driving demand, credible sustainable cotton cultivation standards are central to its analysis. Following the WWF Certification Assessment Tool, we consider four sustainable cotton cultivation standards credible: Organic cotton, Fairtrade cotton, CmiA, and Better Cotton. These schemes currently dominate the sector in terms of cultivation, market uptake and recognition

6. Croponosis, cited in Measuring Sustainability in Cotton Farming Systems Towards a Guidance Framework, SEEP ICAC and FAO, 2015.

7. Chapagain, A.K., Hoekstra, A.Y., Savenije, H.H.G. and Gautam, R. (2006) The water footprint of cotton consumption: An assessment of the impact of worldwide consumption of cotton products on the water resources in the cotton producing countries, *Ecological Economics*, 60(1): 186-203.

8. Minot, N. & Daniels, L. 2005. Impact of global cotton markets on rural poverty in Benin. *Agricultural Economics*, 33(3): 453-6.

by stakeholders. They are regarded as trustworthy both in terms of their content and the systems that regulate how they are implemented, assessed and governed. Currently, US cotton cultivation is only marginally covered by these

standards and, unlike Australia (myBMP) or Brazil (ABR), lacks any dedicated sustainability approach, although the multi-crop 'Field to Market' programme shows potential.

A brief overview on each standard is given below:

Standards	Standard objectives	Standard scope
 <p><a href="http://www.bettercotton.org">www.bettercotton.org</a></p>	<p>Make global cotton cultivation better for the people who produce it, better for the environment it grows in and better for the sector's future. Transform cotton cultivation worldwide by developing Better Cotton as a sustainable mainstream commodity.</p>	<p>Overseen by BCI, the Better Cotton standard covers environmental and social criteria for both smallholders and large farms. Better Cotton is a benchmark standard for the industry and BCI recognises the following regional standards as equivalent: Algodão Brasileira Responsável / Responsible Brazilian Cotton (ABR), myBMP from Australia, and CmiA.</p>
 <p><a href="http://www.cottonmadeinafrica.org">www.cottonmadeinafrica.org</a></p>	<p>Improve the living conditions of African smallholders and promote environmentally friendly cotton cultivation.</p>	<p>CmiA is based on good agricultural practices and a comprehensive range of social and economic criteria. Its focus is on Africa alone, and on small farmers growing in rain-fed conditions. It is benchmarked to the Better Cotton standard.</p>
 <p><a href="http://www.fairtrade.net/products/cotton.html">www.fairtrade.net/products/cotton.html</a></p>	<p>Connect disadvantaged producers and consumers, promote fairer trading conditions and empower producers to combat poverty, strengthen their position and take more control of their lives.</p>	<p>The Fairtrade cotton standard covers social, economic and environmental criteria. It is limited to small producer organisations in developing countries.</p>
 <p><a href="http://www.organiccotton.org">www.organiccotton.org</a></p>	<p>Organic cotton is grown from non genetically modified seeds without the use of any synthetic agri-chemicals. Beyond replacing synthetic fertilisers and pesticides by organic ones, organic cotton cultivation also takes into account broad agronomic processes.</p>	<p>Several general (not cotton-specific) organic farming standards underpin organic cotton cultivation and certification: regional and national legal standards defining organic farming (EU, US, Japan) are predominant and co-exist with voluntary standards such as IFOAM, Naturland, or IMO Fair for Life. The main requirements are environmental, although some voluntarily include social criteria.</p>

Recycled cotton is another sustainable option. Cotton can be recycled from pre-consumer waste generated during the textile production process and from post-consumer waste comprising discarded textile products. Cotton is currently recycled mostly through mechanical fibre recycling which downgrades fibre length and quality and requires blending with virgin fibres for further use. Emerging technologies offer some hope for chemical cotton fibre recycling that would allow production of recycled fibre equal in quality to virgin fibre.

Two main standards developed by Textiles Exchange provide frameworks for trading and processing recycled cotton:

-  Global Recycle Standard (GRS) – a holistic certification standard for products containing any recycled content;
-  Recycled Claim Standard (RCS) – a chain of custody standard to track recycled raw materials through supply chains.

Volumes of recycled cotton currently available and used remain limited.

# SUSTAINABLE COTTON MARKET: SUPPLY AND UPTAKE



The gap between available supply of more sustainable cotton and uptake by companies presents a serious risk to the future of more sustainable cotton. Unless this gap is closed and market uptake increases, sustainable cultivation will not reach the tipping point needed to make more sustainable cotton the norm.

This section presents an overview of recent developments in the supply and uptake of more sustainable cotton.

Quantitative data was kindly provided by BCI, CmiA, the Fairtrade Foundation and Textile Exchange. Whereas most data refer to the January to December calendar year, cotton cultivation data may refer to the internationally agreed cotton season from August to July. Where data were not available, we used estimates. Qualitative data were gathered through desk research and questionnaires completed by the above organisations.

## DEFINITIONS

The concept of 'supply' refers to the available volumes of cotton produced according to one of the four sustainability standards.

The concept of 'uptake' refers to the sourcing and purchasing of more sustainable cotton in the supply chain. For example, retail uptake refers to the deliberate use of more sustainable cotton by retailers and brands in their products. Uptake differs from 'demand' in the sense that it results from actual sourcing and purchasing, while demand may only amount to a stated intention or commitment to source or purchase.

## INCREASING AVAILABILITY

The share of sustainable cotton increased from 8% in 2014/15 to 12% in 2015/16. And for 2016/17, the total volume of sustainable cotton is estimated to be 15% of global cultivation, which amounts to approximately 3.4 million MT.

Increasing availability of more sustainable cotton makes it easier for brands and retailers to make and keep sourcing commitments to more sustainable cotton.

Greater transparency by brands and retailers about their long-term sourcing targets helps their suppliers prepare for and deliver on requests for more sustainable cotton.

“

The gap between available supply of more sustainable cotton and uptake by companies presents a serious risk to the future of more sustainable cotton. ”

Table 1. Increasing production and low uptake

YEAR <sup>9</sup>	VOLUME OF SUSTAINABLE COTTON PRODUCED <sup>10</sup> (MT LINT)	UPTAKE BY BRANDS AND RETAILERS (MT LINT)	% UPTAKE OF CULTIVATION
2008-09	210,000	●	●
2009-10	242,000	●	●
2010-11	225,000	●	●
2011-12	593,000	●	●
2012-13	793,000	●	●
2013-14	1,678,000	●	●
2014-15	2,127,000	360,000	17%
2015-16	2,635,000	552,949	21%

● No Data Available

### ORGANIC COTTON



Most recent data<sup>11</sup> show that the volume of organic cotton lint produced in 2014/15 was 112,488 MT. Organic cotton was produced in 19 countries. Five of them represent 92% of cultivation: India (67%) China (12%), Turkey (6%), Kyrgyzstan (5%) and USA (2%). In 2014/15 193,840 farmers cultivated organic cotton on 350,033 hectares of land.

### CmiA COTTON



In 2016, a total volume of 320,100 MT of CmiA cotton lint was produced in ten African countries by 780,000 farmers on 1,182,000 hectares of land, which was a slight decline on the previous year.

### FAIRTRADE COTTON



The cultivation of Fairtrade cotton lint was around 16,640 MT in 2015/16. The cotton was produced by 32,430 farmers on 34,876 hectares in seven different countries. A large percentage of Fairtrade cotton is also certified organic. In 2015, 73% of Fairtrade cotton producers also held organic certification – marking an increase of 8% over the previous year.

### BETTER COTTON



Better Cotton represents the largest share of more sustainable cotton. In the 2015/16 season, 2.5 million MT of Better Cotton lint was produced in 23 countries on five continents, including cotton produced under benchmarked standards: 52,000 MT myBMP in Australia, 832,000 MT ABR in Brazil, and 320,100 MT CmiA. Better Cotton was produced by 1.5 million farmers on 3.5 million hectares of land.

9. Cotton season from August to July.

10. Aggregated data for Organic, Fairtrade, Cotton made in Africa and Better Cotton

11. <http://textileexchange.org/wp-content/uploads/2017/02/TE-Organic-Cotton-Market-Report-Oct2016-1.pdf>

Table 2. Production of sustainable cotton per country.

COUNTRY	ORGANIC COTTON (MT LINT, 2014/15)	FAIRTRADE COTTON (MT LINT, 2014/15)	CMIA COTTON (MT LINT, 2015/16)	BETTER COTTON (MT LINT, 2015/16)
Australia	○	○	○	52,000
Benin	377	●	○	○
Brazil	22	○	○	832,000
Burkina Faso	1,067	●	●	○
Cameroon	○	○	●	○
China	13,145	○	○	415,000
Colombia	1	○	○	○
Ivory Coast	○	○	●	○
Egypt	2,150	●	○	○
Ethiopia	145	○	●	○
Ghana	○	○	●	○
India	75,251	●	○	373,000
Israel	14	○	○	19,000
Kyrgyzstan	5,543	○	○	○
Madagascar	5	○	○	1,000
Mali	526	●	○	56,000
Mozambique	○	○	●	16,000
Nicaragua	○	○	○	○
Pakistan	○	○	○	352,000
Peru	553	○	○	○
Senegal	13	●	○	1,000
South Africa	○	○	○	1,000
Tajikistan	1,000	○	○	11,000
Tanzania	2,146	○	●	○
Turkey	7,304	○	○	23,000
Uganda	795	○	●	○
USA	2,432	○	○	34,000
Zambia	○	○	●	○
Zimbabwe	○	○	●	○

○ N/A ● Undisclosed Volume<sup>12</sup>

## MORE FOCUS ON UPTAKE

Increased demand from the market resulting in actual uptake is essential to make more sustainable cotton a mainstream commodity. Since the publication of *Mind the Gap*<sup>13</sup> and the first *Cotton Ranking in 2016*<sup>14</sup>, uptake has become a topic of discussion for brands and retailers, civil society organisations and sustainability standards involved in the sector.

Initiatives such as the *Organic Cotton Accelerator*<sup>15</sup> (OCA), *Cotton 2040*<sup>16</sup> and an initiative launched by *The Prince of Wales' International Sustainability Unit*<sup>17</sup> (ISU) aim to enlist brands and retailers in creating increased and more transparent demand for and uptake of more sustainable cotton.

12. "Undisclosed volume" means that sustainable cotton of the relevant standard was produced in the relevant countries but that country level production data is not available.

13. <https://www.solidaridadnetwork.org/publications/mind-the-gap-towards-a-more-sustainable-cotton-market>

14. [http://d20uvy59p0dg6k.cloudfront.net/downloads/cotton\\_ranking\\_report\\_\\_june\\_2016\\_2.pdf](http://d20uvy59p0dg6k.cloudfront.net/downloads/cotton_ranking_report__june_2016_2.pdf)

15. <http://www.organiccottonaccelerator.org/>

16. <https://www.forumforthefuture.org/project/cotton-2040/overview>

17. <http://www.pcfisu.org/sustainable-cotton/>

Both Textile Exchange and BCI published a list showcasing ten retailers and brand members sourcing most **Organic**<sup>18</sup> or **Better Cotton**<sup>19</sup>. And to ensure smaller companies were recognised for their efforts as well, both standard organisations also listed those making most progress.

At least 16 large companies have committed to sourcing 100% sustainable cotton by 2020. In last year's ranking in June 2016, 12 companies were listed as having made such a

commitment<sup>20</sup>. Since then, new commitments made include those from Bestseller, Decathlon and Tesco.

Thanks to these and other efforts to stimulate uptake of more sustainable cotton, the gap between supply and uptake is slowly narrowing. The total share of all available more sustainable cotton actively sourced by brands and retailers increased from 17% in 2015 to 21% in 2016.

### ORGANIC COTTON



Uptake by brands and retailers is highest for Organic cotton compared to other standards at 70 - 80%. This amounts to approximately 84,366 MT of cotton lint.

### CmiA COTTON



It is estimated that 18% (50,000 MT) of all CmiA cotton lint was taken up by spinners, and 11% (30,000 MT) ended up at retail level - including CmiA cotton that was sold as Better Cotton. 31 European and North American companies sourced CmiA cotton in 2016.

### FAIRTRADE COTTON



Over 200 brands globally source Fairtrade cotton. Retail uptake was estimated to be 8,583 MT (approximately 51% of production) in 2016 with the biggest volumes being sourced by France, the UK and Germany.

### BETTER COTTON



Uptake of Better Cotton has increased steeply. In 2015, 251,000 MT of Better Cotton was actively sourced by brands and retailers. In 2016, this almost doubled to 461,000 MT sourced by 54 retailers. Share of uptake relative to cultivation therefore increased from 13% to 18%. 807,000 MT of cotton lint was sourced at the spinning stage of cultivation, amounting to 32% of the total volume produced.

## UPTAKE STILL LAGGING BEHIND

Recognition that uptake is essential in stimulating more sustainable cotton cultivation has spread widely across the industry. Many stakeholders - standards organisations, companies, civil society organisations - are contributing to the increase of uptake by starting or joining initiatives, or by actively sourcing more sustainable cotton. At the same time, cultivation is strong: season upon season, supply of more sustainable cotton has grown.

However, most cotton produced globally is still grown conventionally. Of all more sustainable cotton produced, 79% is not actively sourced by companies. Even though the increase in uptake is a welcome development, the gap between supply and uptake is still too wide. For more sustainable cotton to become the norm, both supply and uptake need to increase significantly.

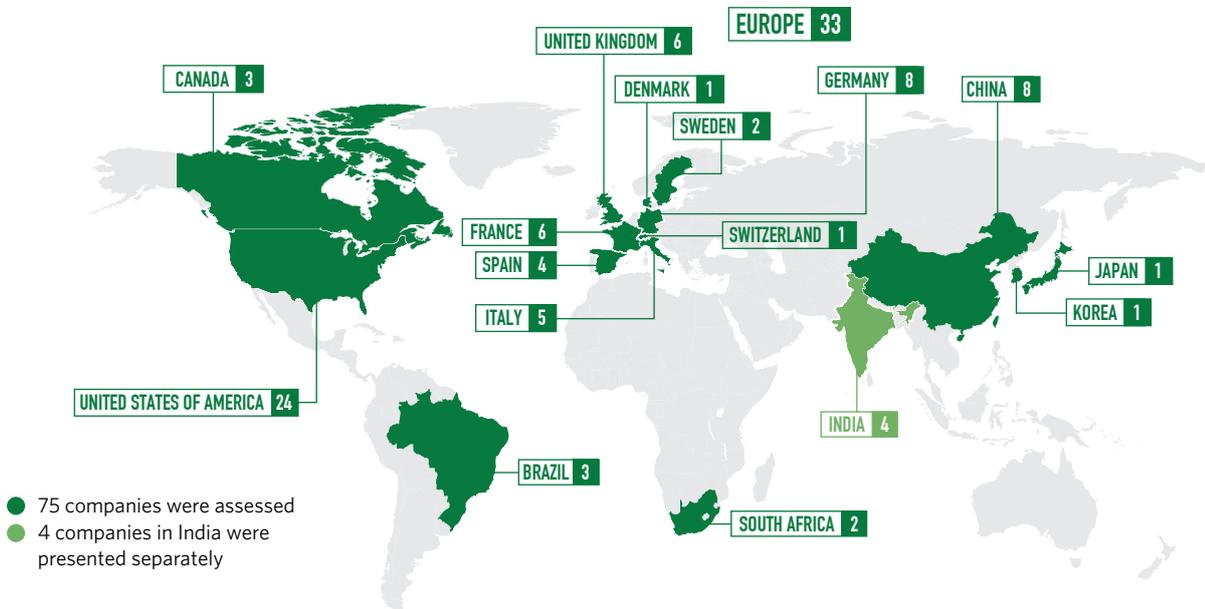
18. <http://textileexchange.org/wp-content/uploads/2017/02/TE-Organic-Cotton-Market-Report-Oct2016.pdf>

19. <http://bettercotton.org/find-out-which-bci-retail-and-brand-members-procure-the-most-better-cotton/>

20. Adidas, C&A Group, H&M, IKEA, Kappahl, Kathmandu, Lindex, Migros, Nike, Inc., Otto group, RNB Retail & brands, Tommy Hilfiger (PVH group).

# RANKING METHODOLOGY

Figure 1. Number of companies assessed in each country



## COMPANY SELECTION

The ranking assessment focuses on consumer-facing companies with significant cotton use. This year, the largest companies in emerging markets in Brazil, China, India and South Africa were identified and added to the list.

Consumer-facing companies using cotton include apparel brands, supermarket chains, and furniture and department stores. Due to their prominence in their respective markets, their role in encouraging cotton farmers to grow more sustainable cotton, and requiring supply chain actors to source and use it in their products, is central.

The assessment focuses on companies rather than the individual brands they own. While sustainability practices can vary significantly between different brands, entire companies need to change sourcing practices across all their brands to transform cotton cultivation.

We selected companies according to sector indices and benchmarks, as well as lists of top companies in the fashion and garment sector and their respective markets. In total we assessed 75 companies, 27 from North America, 33 from Europe, 14 from Asia (which also includes an additional four Indian companies that we didn't formally include in the overall results presentation), three from Brazil and two from South Africa. Please refer to page 15 for a special analysis dedicated to India.

Each of these companies is estimated to use more than 10,000 MT of cotton annually in their products. Due to lack of publicly available data from companies themselves, in most cases we estimated their use of cotton. We are aware that these estimates may be inaccurate and invite companies to publish their actual (or estimated) cotton use.

## ASSESSMENT BY SPECIALIST CONSULTANTS

PAN UK, Solidaridad and WWF commissioned a specialist consultancy company, Aidenvironment, to undertake the the assessment of company performance. This was done to ensure consistency and ensure the objectivity of the analysis. In the 2016 Ranking Report a similar role was performed by the organization Rank a Brand.

## ASSESSMENT QUESTIONNAIRE

A questionnaire covering three areas - policy, actual uptake and traceability - formed the backbone of the company assessment. For each area, the consultants used a number of specific indicators to assess company performance. With the exception of one question (question 9), companies only received points on the basis of publicly available information.



## POLICY

Sustainability policies provide a company with a vital foundation and direction for business operations. Publishing a policy is often the first step on the journey to more sustainable cotton sourcing.



## UPTAKE

Irrespective of the quality of a sustainability policy, only its implementation can deliver change. To reflect this, the assessment allocated 55% of total available points to scoring uptake of more sustainable cotton, both as a percentage of total volume of cotton used and, to recognise the particular effort of companies using very large volumes of more sustainable cotton, as an absolute figure.



## TRACEABILITY

Companies must pay attention to the origin of their cotton, who their suppliers are, and how much cotton passes through their supply chain. Such information helps a company and its suppliers build long-lasting relationships that can accelerate transformation of the cotton market towards sustainability. Traceability is also an essential internal decision-making tool for setting and achieving a more sustainable cotton strategy.



## TRANSPARENCY

Underpinning this assessment is the expectation that companies report publicly on policy, uptake and traceability. Transparency through public reporting is vital for demonstrating sustainability leadership and enabling accountability to stakeholders. Therefore we assessed companies only on the basis of publicly available information. The one exception was question 9 on volumes of more sustainable cotton used by companies for which we accepted data shared in confidence as this information is often considered to be commercially sensitive.



## CHANGES IN 2017

While the structure of the questionnaire in 2017 and the proportion of points allocated to policy (20 points), uptake (55 points) and traceability (25 points) is similar to that in 2016, we introduced a few changes.



The number of points available was increased to give a maximum possible score of 100.



The score given to a company with a target to source 100% sustainable cotton (question 7) was doubled.



We added a new question (question 9) with up to five points available for the absolute volume of more sustainable cotton sourced by a company. This recognises the key role of large users of more sustainable cotton (still on their journey to reaching a 100% sourcing target) in building demand. Exceptionally for this question, we granted points for data shared in confidence.



The question on whether a company uses a traceability tool was removed as most companies use the traceability system related to the sustainability standard they use, and we are not in a position to evaluate the effectiveness of other traceability tools.



We moved the question on whether a company reports the absolute volume of cotton used annually to the traceability section (question 10).

The changes introduced in the questionnaire in 2017, as well as the expansion of the list of companies assessed, to some extent limits the validity of comparing 2016 scores with 2017 scores. Any comparison should take into account the background information on the specific company.

For presentation and readability purposes, company scores appearing on the Cotton Ranking website [<http://sustainablecottonranking.org/>] were allocated colours and performance levels as shown below; and final individual company scores were rounded up or down to one decimal place.

Table 3. Overview of status by score.

STATUS	TOTAL SCORE	POLICY	UPTAKE	TRACEABILITY
Not yet started	<b>0 - 4.9</b>	0 - 0.9	0 - 2.7	0 - 1.2
Starting the journey	<b>5 - 24.9</b>	1 - 4.9	2.8 - 13.7	1.3 - 6.2
Well on the way	<b>25 - 49.9</b>	5 - 9.9	13.8 - 27.4	6.3 - 12.4
Leading the way	<b>50 - 100</b>	10 - 20	27.5 - 55	12.5 - 25



## CONSULTATION AND ASSESSMENT PROCESS

The questionnaire was sent by the consultants to all selected companies in April 2017. Companies were given four weeks to respond. When the questionnaires were returned, the consultants reviewed the answers and validated them against information published on company and other websites. 27 companies did not respond – or provided only partial answers. In these cases, information on company websites and from other public sources was used. On the basis of responses or research, the consultants allocated initial scores to companies.

These initial scores including justifications were shared with the companies for review and comment in June. Companies had two weeks to respond. The consultants reviewed and validated additional responses and the points allocation was adjusted where appropriate. Some companies that had not responded to the initial questionnaire responded at this stage. After a final check for consistency, the consultants determined the final scores for all companies in mid-July 2017.

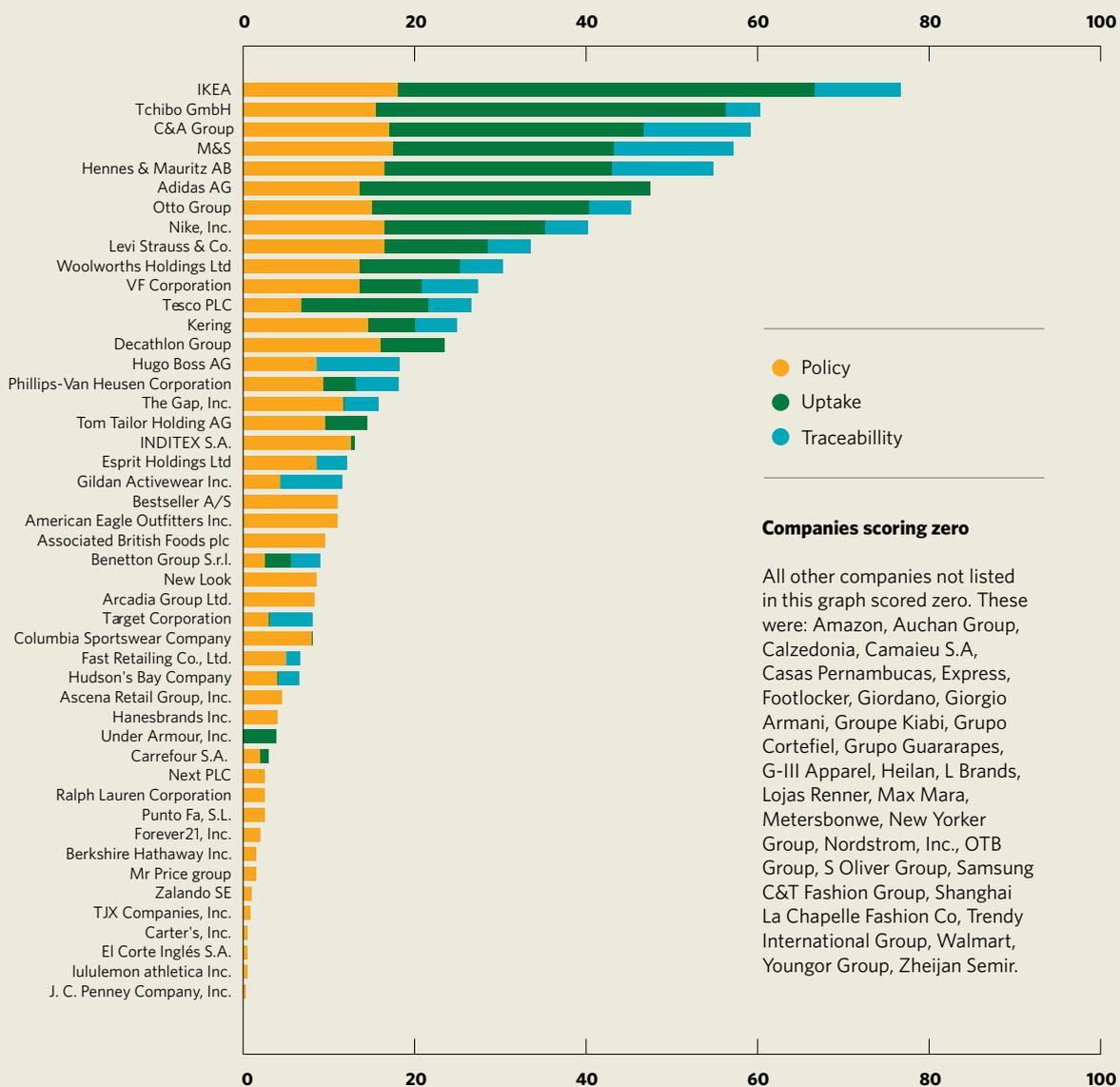
# RANKING RESULTS

Detailed company by company results can be seen at [sustainablecottonranking.org](http://sustainablecottonranking.org)

In 2017, twice as many companies (75) were assessed as in 2016 (37). An additional four Indian companies were also assessed separately (see page 15 - India).

Overall, sustainability efforts are driven by five frontrunners, followed by eight more companies that are well on the way and 18 others just starting the journey. The remaining 44 scored no points and have not yet started the journey.

Figure 2. Company scores and ranking



## POLICY



Top 6: IKEA, Marks & Spencer, C&A Group, H&M, Nike, Inc., Levi Strauss & Co.



17 companies are leading the way, 10 are well on the way, 14 are starting the journey, and 34 have not yet started.



19 companies have some kind of target for sourcing more sustainable cotton, of which 11 have a target for sourcing 100% more sustainable cotton by 2020 or earlier: IKEA, C&A Group, Marks & Spencer, Tchibo GmbH, H&M, Adidas, Otto, Nike, Inc., Levi Strauss, Woolworths and Decathlon.



### GENERAL POLICY

Better performing companies recognise negative environmental impacts of cotton cultivation and have some sort of policy in place on cotton sustainability.

29 companies have a general policy statement on the impacts of cotton cultivation in the supply chain and an expression of intent to reduce them and were awarded the maximum number of points. 35 companies have no clear or published policy in place and received no points. Of the remaining 11 companies, there are instances of policies not applying to all brands or collections produced, or not applying to the full supply chain, and of vague statements from which it was not clear whether a policy existed or not. These companies received fewer points.

A number of specific policy areas were also examined, revealing some important gaps detailed below.



### HIGHLY HAZARDOUS PESTICIDES (HHP)

No companies have policies for the elimination of HHPs in cotton cultivation and across their entire collection or product range. Some list a number of hazardous chemicals and restricted substances including pesticides and restricted substances including pesticides in their supplier agreements. Among the better performers, Inditex supports training of suppliers in efficient agricultural techniques, sustainable management of natural resources and responsible use of chemical products.



### WATER

Researchers looked for corporate policies with clear time-bound commitments to reduce water use and water pollution in cotton cultivation. 31 companies have some kind of policy in place but 43 scored no points at all. IKEA, C&A Group and Levi Strauss & Co. stand out. IKEA has a commitment to be 'water positive' (efficient use of water, promoting good water stewardship throughout and beyond the value chain) by 2020. C&A Group has a goal of reducing water usage during cultivation by 30% by 2020 and has developed a guide to reduce the water footprint of cotton cultivation in India. Levi Strauss & Co. has an extensive water policy but as this does not cover the cultivation stage of cotton they did not receive full points.



### BIODIVERSITY

Biodiversity is less well addressed in company policies. Few companies have policies, commitments or relevant activities. No companies achieved maximum points - and 44 received no points at all. Inditex stands out for avoiding the sourcing of materials that pose a risk to biodiversity, for seeking more sustainable alternatives, and for cooperation with supply chain partners. Tchibo GmbH is also committed to defining concrete biodiversity targets and to implementing them together with suppliers. However, neither company has time-bound targets in this area.



### RECYCLING

A number of companies have programmes in place for reusing or recycling cotton and other textiles. This included companies scoring lower on policies to reduce impacts of cotton in their raw material supply chain. Very few companies achieved the maximum possible score as policies do not apply to all cotton products, brands or collections. The extent and timing of programmes and time commitments is often unclear, or programmes address textiles but not necessarily cotton. Nike, Inc., with a policy of sourcing recycled cotton, is actively working towards creating closed-loop products and decreasing waste.



## LABOUR/HUMAN RIGHTS

Researchers looked for policies, statements or codes of conduct on forced/child labour and human rights violations in cotton cultivation, as well as evidence of due diligence process (either in progress or completed) aligned with UN Guiding Principles on Business and Human Rights Reporting. Better scoring companies have supplier codes of conduct which are applicable to cotton cultivation, and which are clear, specific and audited. IKEA, Marks & Spencer and Primark (ABF) stand out, achieving the maximum score in this area.

In June 2016, Marks & Spencer published an inaugural Human Rights Report, outlining steps being taken. Marks & Spencer is one of the first organisations to report in line with the UN Guiding Principles on Business and Human Rights Reporting. Several companies reported that they do not use cotton from specific countries with reported forced/child labour issues in cotton cultivation such as Uzbekistan, Turkmenistan and Syria. A further 20 companies, while members of standards organisations, did not provide sufficient evidence.



## TIME-BOUND COMMITMENT

Finally, researchers looked for public targets for 100% more sustainable cotton sourcing by 2020 (or earlier). IKEA stands out with a 100% target for 2015 which by its own criteria it has already met<sup>21</sup>. In all, 11 companies in this ranking aim to hit 100% sourcing targets by 2018, 2019 or 2020. Targets beyond 2020 received fewer points. 6 companies have commitments that do not cover all their brands/collections. 55 companies have no publicly available commitments at all. These are generally the companies with lower total scores.

## UPTAKE



Top 5: IKEA, Tchibo GmbH, Adidas, C&A Group, H&M.



4 companies are leading the way, 5 are well on the way, 8 are starting the journey, and 58 have not yet started.



IKEA, C&A Group, Tchibo GmbH and Adidas stand out for sourcing more than 50% of the cotton they use as more sustainable cotton.



22 companies report some sourcing of more sustainable cotton (in volume and/or percentage

of total use): 18 companies publicly disclose the percentage of more sustainable cotton used; 20 companies disclosed the volume of more sustainable cotton they use, publicly or in confidence.



The rest (53) do not source more sustainable cotton or do not disclose this information publicly.

To recognise the leading role played by large users of more sustainable cotton in building demand, points were allocated to companies based on the absolute volume of more sustainable cotton used, irrespective of the percentage of their total cotton use this amount represented. For a variety of reasons (mainly due to commercial sensitivity) most companies do not publish this figure. The majority shared this information in confidence with the researchers. Only IKEA and H&M obtained the maximum number of points on this parameter.

## TRACEABILITY



Top 3: Marks & Spencer, C&A Group, H&M.



1 company is leading the way, 6 are well on the way, 15 are starting the journey, and 53 have not yet started.



7 companies (IKEA, C&A Group, Marks & Spencer, Otto Group, Woolworths Holding, Tesco - only for its F&F brand - and Hugo Boss) publish the absolute volume of all cotton lint used.



5 companies (IKEA, Marks & Spencer, C&A Group, VF Corporation, and Kering) publish information on the countries of origin of the cotton they use.



18 companies publish some information on their tier-1 suppliers (finished products) including 6 (C&A Group, Marks & Spencer, H&M, Nike, Inc., Levi Strauss and VF Corporation) publishing 100% of their suppliers for this tier.



Only 3 companies publish some information on their tier-2 suppliers (fabric makers) (C&A Group, H&M and Kering).



Only H&M publishes information on their tier-3 suppliers (yarn spinners).

21. IKEA includes the e3 standard and its own interpretation of "towards Better Cotton," which are not considered to be sufficiently credible by PAN UK, Solidaridad and WWF.



## INDIA

Four Indian companies were included in the 2017 Cotton Ranking: Aditya Birla Fashion & Retail, Arvind Lifestyle, Raymond & ITC. None of these companies have any publicly available information on policies on more sustainable cotton, uptake, or traceability criteria.

Nevertheless, India is highlighted in the report as a representative example of all emerging markets with the aim of gaining a better understanding of the situation and potential strategies for improving uptake in these markets.

The Indian apparel industry is estimated to be worth \$27 billion and growing at 10-12% per annum. Improved penetration of organised retail, proliferation of private labels, growth of alternative retail channels and evolving consumer preferences, have all contributed to expansion. Value and affordability for the consumer remain the main drivers of product development for most major companies.

While company priorities centre primarily on increasing market share and improving profitability, sustainability is growing in importance in the apparel and retail industry in India. Participation in forums such as the Sustainable Apparel Coalition (SAC) and membership of organisations like BCI is growing and ethical and environmental product lines are beginning to emerge. Support for more sustainable cotton cultivation projects from corporate social responsibility programmes is also increasing.

Despite these developments, uptake of sustainable cotton domestically in India is negligible. While companies recognise the need to adopt sustainable business practices, most current efforts are focused on resource efficiency and social license to operate. A more holistic approach addressing the lifecycle of products and operations is yet to be widely adopted.

Domestic companies do not have clear cotton procurement policies or targets. Uptake of more sustainable cotton is limited to select product lines and most companies struggle to establish traceability in complex supply chains. While two out of the top four brands publish sustainability

reports (Arvind Lifestyle and ITC), public disclosure on cotton consumption is limited. Increasing levels of vendor engagement on water stewardship, chemical management and socially responsible labour practices in tier-1 and tier-2 of supply chains are hampered by a lack of technical know-how, capacity, and awareness about ethical supply chains, even among big businesses.

Despite the growing Indian market, domestic companies are still significantly smaller than global companies and attribute lack of uptake of more sustainable cotton to their inability to leverage economies of scale due to international competition. Despite investment in field improvement projects, more sustainable cotton procurement remains a niche catering for large volume brands and export markets. Operating in a cost sensitive market, Indian companies cite economic viability as a key constraint making additional transactional costs associated with certified sustainable cotton unaffordable. Inventory hoarding to control prices, climate-related agricultural limitations, and water availability, all influence prices.

Companies claim lack of consistent supply at required quality specifications, volumes and price as a major limiting factor for more sustainable cotton procurement. Improving the supply of more sustainable cotton and enhancing transparency and credible systems will require much work.

Lack of consumer demand is another key issue. Companies recognise increasing consumer awareness around the impacts of unsustainable cotton cultivation but this is yet to affect purchasing patterns while price remains the primary decision driver.

Companies in Europe and the US offer similar explanations. These are addressed in the Mind the Gap report.

“

Despite investment in field improvement projects, more sustainable cotton procurement remains a niche catering for large volume brands and export markets. ”

Indian companies have a real opportunity to:

-  develop sustainable policies and time-bound commitments to source more sustainable cotton;
-  create responsible supply chains and market differentiation through sustainability;
-  build consumer awareness and domestic demand for more sustainable cotton.

# RESULTS ANALYSIS

## RESULTS ARE ENCOURAGING...

Improvements since the first ranking in 2016 are encouraging and suggest that leaders will continue to lead the way, driving sustainability in the sector. Positive outcomes include:

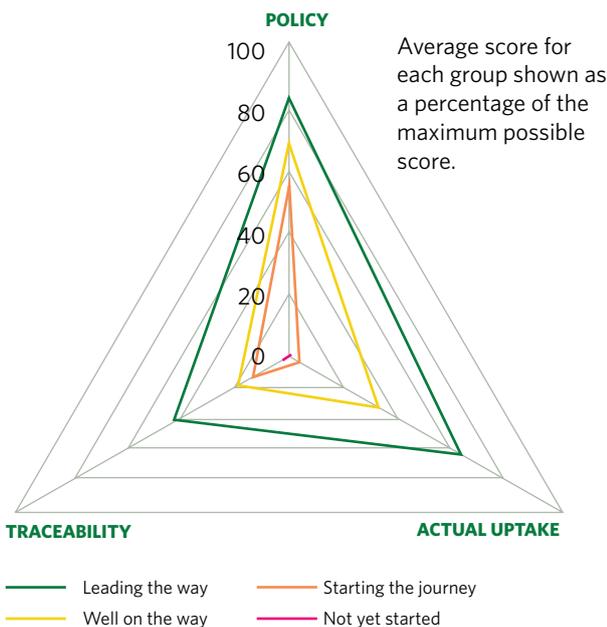
-  more companies with policies and commitments;
-  more companies using more sustainable cotton; and
-  increased overall uptake of more sustainable cotton.

## ...BUT THERE'S STILL MUCH TO DO

While significant positive progress is evident, there is still much to do:

-  only around half of all assessed companies have a policy on cotton sustainability;
-  company performance on uptake and traceability is considerably lower than on policy, even among leaders;
-  only 11 companies have time-bound commitments or targets for greater use of more sustainable cotton; and
-  uptake of more sustainable cotton remains relatively low with most of the heavy lifting being done by a handful of leaders.

Figure 3. Leaders lead in all areas



## WHAT MAKES A LEADER?

Those companies with high levels of more sustainable cotton use (as a percentage of total volume of cotton used) scored highly on policy and traceability – they were more likely to have published clear policies and to provide insight into their supply chains.

The reverse is not always true. High policy scores do not always translate into higher uptake. This is the case for: Hugo Boss, The Gap, Inc., Kering, Decathlon, PVH, Inditex, Esprit, Bestseller, American Eagle, Primark and New Look.

## POLICY

### GENERAL POLICY

Encouragingly, half of all companies assessed have some kind of published overall policy for more sustainable cotton – and the leaders have clear overall policy statements in place.

Many companies refer to their membership of standards organisations or sustainability initiatives when describing their policies and some seem to regard their membership as sufficient. Membership of or partnership with BCI, CmiA, OCA, Fairtrade or CottonConnect yielded 1.5 out of a possible 2.5 points for each of the specific policy areas. Of the companies ranked, 23 are members of BCI and there appears to be a general trend towards acceptance and endorsement of the Better Cotton standard.

Leaders go further, developing and publishing their own policies. They acknowledge the issues and clearly express their intent to improve performance on all of the cotton they use.



## SPECIFIC POLICY AREAS

Relatively few companies have policies on pesticides, water, biodiversity, human rights or recycling. Where they have such policies, these often lack specificity, metrics or commitments, or they do not cover cotton cultivation in the supply chain. In several cases, policies do not apply to all product categories, brands or collections.

Biodiversity and HHPs are two areas with few corporate policies or commitments. There is some awareness (e.g., some companies have lists of restricted chemicals) but no company achieved a maximum score.

Water use receives a little more attention. Leaders have formulated targets for reduction in water footprint but only two companies have policies or statements with clear time-bound commitments to reduce water use and water pollution.

Labour abuse is a key issue but only three companies have policies or statements against forced/child labour and human rights violations during the cotton cultivation and the remainder of the supply chain. These include a due diligence process in progress or completed in line with the UN Guiding Principles on Business and Human Rights. 37 companies have no policy at all and may not see cotton cultivation as their responsibility.

Progress on recycled cotton is more positive. 12 companies have two or more of the following policies in place: post-consumer collection of textiles, reusing/recycling pre-consumer waste, investing in 'closing the loop' initiatives, or sourcing of recycled cotton. Marks & Spencer has a comprehensive strategy for cotton recycling, including its 'Shwopping' initiative and its incorporation of a greater proportion of recycled fibre in new products. Notably, some companies outside the leading group, with lower policy scores, also have programmes in place for recycling and reuse.

For all companies, there is still work to be done. While membership of standards organisations is important, it is only the first step on the road to credible and tangible improvement.



## TIME-BOUND COMMITMENTS

Public time-bound commitments and targets are essential for driving uptake of more sustainable cotton within companies. Still only a few leading companies have these.

## UPTAKE

The top eight companies report greater uptake of more sustainable cotton than last year.

Most companies specifying targets and commitments also report volumes and percentages of more sustainable cotton used, confirming that public time-bound targets drive performance in uptake. For the 18 companies reporting on more sustainable cotton as a share of total use, average use is 33%.

Companies classified here as 'leading the way' perform better than the rest in all areas but the difference is most marked in the area of uptake. And the tail-off is quite rapid: a few leaders have relatively high scores, followed by a few more with successively lower scores, while most score nothing at all.

Either companies are not yet sourcing more sustainable cotton despite their policies, or they are not reporting it. To encourage growth in the supply of more sustainable cotton, and retain credibility, companies need to translate policies into actual uptake.

## TRACEABILITY

This area is where performance is lowest overall. And, the deeper the examination of supply chains by researchers, the less companies appear to report on.

Very little information is published on finished product manufacturers, fabric manufacturers or yarn spinners with the exception of a few leaders. Leaders are more transparent this year than last year, publishing additional information but there is still work to be done.

Only a few companies (IKEA, Marks & Spencer, C&A Group, VF Corporation and Kering) publish information on the countries of origin of the cotton they use, including the specific percentages/volumes from each country. Sometimes a map showing countries is provided but most companies publish nothing.

Of all assessed companies only seven companies (IKEA, C&A Group, Marks & Spencer, Otto Group, Tesco - only for its F&F brand, and Hugo Boss) publish absolute volumes of all cotton lint used.

Transparency and accountability to stakeholders on volumes and origin of cotton used are essential for a more sustainable cotton sector.

## COMPARISON WITH 2016

Allowing for methodological changes between the 2016 and 2017 rankings, of the 25 companies assessed in both editions, 18 improved their performance.

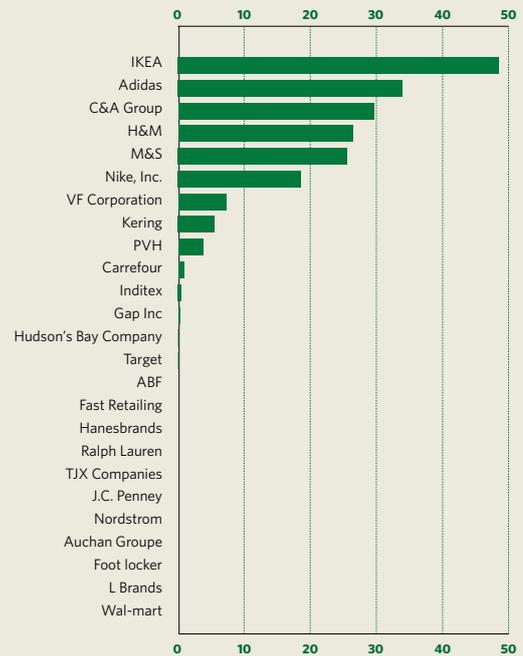
This is most obvious in uptake with 14 out of the 25 showing greater uptake. The top 5 companies in 2016 (IKEA, C&A Group, H&M, Adidas and Nike, Inc.) all increased their sourcing of more sustainable cotton (as a percentage of total volume) by approximately 20% in 2017. Of all these companies, C&A Group made the biggest advance in uptake almost doubling its score.

In the area of policy, 13 of the 25 made real improvements, with The Gap, Inc., IKEA and Marks & Spencer making the biggest advances. IKEA improved across all three areas, and The Gap, Inc. improved in policy particularly, thanks to its BCI membership.

In traceability, 9 of the 25 improved their score. Marks & Spencer, C&A Group and H&M, for example, expanded the public list of their suppliers compared to 2016.

...but uptake remains low...

Figure 5. Uptake



Scoring distribution for actual uptake. A maximum of 55 points was possible representing 100% sustainable sourcing.

A number of companies have policies in place and state their intent to source sustainably...

Figure 4. Policy



Scoring distribution for policy. A maximum of 20 points was possible.

...and few provide much insight into the supply chain.

Figure 6. Traceability



Scoring distribution for traceability. A maximum of 25 points was possible.

# RECOMMENDATIONS

Companies that use large volumes of cotton in their products have a key role to play, in encouraging the further expansion of the sustainable cotton market, and supporting farmers to switch to more sustainable forms of cultivation.

To fulfil this role, companies should start or continue sourcing more sustainable cotton and, as a priority:

- 🌱 Adopt policies on overall cotton sustainability, and specifically on the key topics of HHPs, water, biodiversity, labour conditions, and recycling;
- 🌱 Set public targets for using 100% sustainable cotton by 2020, including the percentage of Better Cotton, organic, Fairtrade, CmiA and recycled cotton;
- 🌱 Report transparently each year on policies, strategies and targets, as well as performance and progress.

In support of the above, companies should also:

- 🌱 Map cotton supply chains down to at least the country of cultivation;
- 🌱 Calculate the volume of cotton used by the business annually and make it public;
- 🌱 Develop a company-wide plan for applying policies and meeting sourcing targets, involving all relevant departments;
- 🌱 Join organisations such as BCI and/or Textile Exchange;
- 🌱 Seek advice from standards organisations, NGOs and peers in their sector.



# ANNEX 1: QUESTIONNAIRE

The question on whether a company reports the absolute volume of cotton used annually was moved to the traceability section (question 10).

QUESTION	MAXIMUM NUMBER OF POINTS
<b>POLICY</b>	<b>20</b>
1. Does your company have a policy to reduce the impacts of its cotton raw material supply?	2.5
2. Does your company have a policy to address the elimination of highly hazardous pesticides (HHP) use in cotton cultivation?	2.5
3. Does your company have a policy to address the reduction of water use in cotton cultivation?	2.5
4. Does your company have a policy to address biodiversity issues in cotton cultivation?	2.5
5. Does your company have a policy to contribute to recycling of cotton-made products and use recycled cotton?	2.5
6. Does your company have a policy to address labour / human rights violations in relation to cotton cultivation?	2.5
7. Does your company have a time-bound target to achieve 100% sustainable cotton sourcing?	5
<b>UPTAKE</b>	<b>55</b>
8. What percentage of the total volume of cotton used by your company is sourced as sustainable?	50
9. What absolute volume of sustainable cotton does your company source?	5
<b>TRACEABILITY</b>	<b>25</b>
10. Does your company report the absolute volume of all cotton (lint) used?	5
11. Does your company publish a list of finished products (garment & home textiles) manufacturers?	5
12. Does your company publish a list of fabric manufacturers?	5
13. Does your company publish a list of yarn manufacturers?	5
14. Does your company publish a list of the country of origin of the cotton used?	5
<b>TOTAL</b>	<b>100</b>





