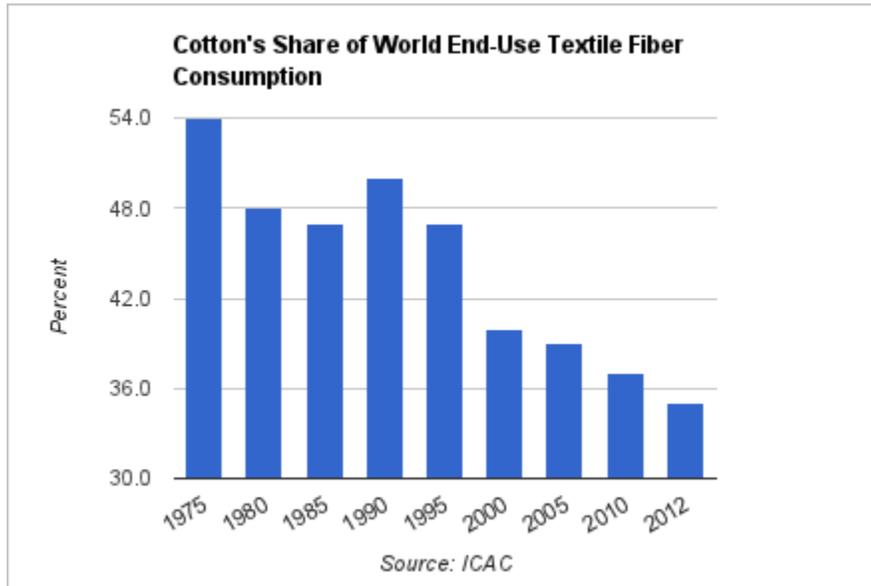


Synthetic the Fabric of Our Lives

Cotton's market share for global end-use consumption is shrinking rapidly. Price fluctuations, weather disruptions, changing consumer attitudes, and other factors have all contributed to cotton losing its market share to synthetic fibers.



In fact, cotton's market share of global end-use consumption is at the lowest level in years. Main reason for this is the hike in price of cotton during 2011, when prices soared from 60 cents per pound to over \$2 per pound in less than a month.

Although the 2011 price debacle certainly hurt cotton's attractiveness to retail buyers around the world, cotton has steadily lost market share since 2000, a serious development for those in the cotton supply chain, which suggests a long term shift has occurred in favor of synthetics.

Price differences between polyester staple and cotton have only deepened a trend that was well established before the cotton price blow-up in 2011. Something else is at work; if anything, price is simply a symptom of a far greater problem. Retail buyers have figured out that the use of blended products, as well as 100% synthetics, is fine with many consumers - a development that reversed many years of consumer preferences for 100% cotton in their garments. The price has played a significant role over the cotton products.

Greater use of synthetic fibres

The technical performance factors also affected fiber-sourcing decisions. But there's another reason that has helped to swing the market towards greater use of synthetic fibres. It's not that sourcing executives don't know the difference between synthetics and cotton, but rather that it's hard for sourcing executives to distinguish amongst all the different cotton messages in the market.

There are various cotton promotion and marketing initiatives out there - each with a specific message representing a particular constituency in the cotton industry, tasked with expanding the reach of cotton in today's market.

When viewed from an industry perspective, it's clear that many of these cotton programs not only compete against synthetics but directly with each other.

Synthetic a better alternative

Prices have helped synthetics gain market share at the expense of cotton; synthetic fibres make them popular among designers and consumers. Moreover, the inherent qualities of Rayon has become an equal to cotton in a wide range of applications, including the key fabric of denim, traditionally a stronghold for cotton.

For many consumers, cotton is not green; the fiber requires too much water, too many pesticides and too much labor to be grown. For other consumers, polyester is green; it can be recycled.

The fact that the fiber is made of petrochemicals and treated with caustic chemicals is beside the point - green messaging in this case has resonated.

Clothes of synthetic fibres are smart and have outperformed their counterparts in the cotton industry. Consequently, many consumers today see no problem wearing synthetics despite its origins, while fretting over how cotton is produced.

The space age was ushered in by none other than lowly polyester: a test tube based, oil-derived product that was successfully sold throughout the world even though the product's main attribute - wrinkle resistance - failed to overcome the product's shortcomings - namely a lack of breathability.

Today, however, the marketing machine continues with more and more sophisticated versions of the same fiber, often blended with cotton to help shore up polyester's cache as well as comfort. Lack of breathability is now equated with warmth and moisture wicking.

A Green Polyester?

The largest consumer of polyester in the world today is actually one of the "greenest," environmentally advanced regions of the world - Europe.

In turn, there are vociferous debates in the cotton industry over whether organic cotton consumes fewer resources than GMO cotton. Regardless of the debate within the cotton industry, many retailers are compelled to react to consumer demand and sell "organic" clothes.

But with ill-described and conflicting definitions of what does or does not constitute organic cotton, who is to say what qualifies? Some say there are established standards while others suggest that standards are still a work in progress. In any event, there's only a limited amount of cotton that could ever be qualified as truly organically produced.