



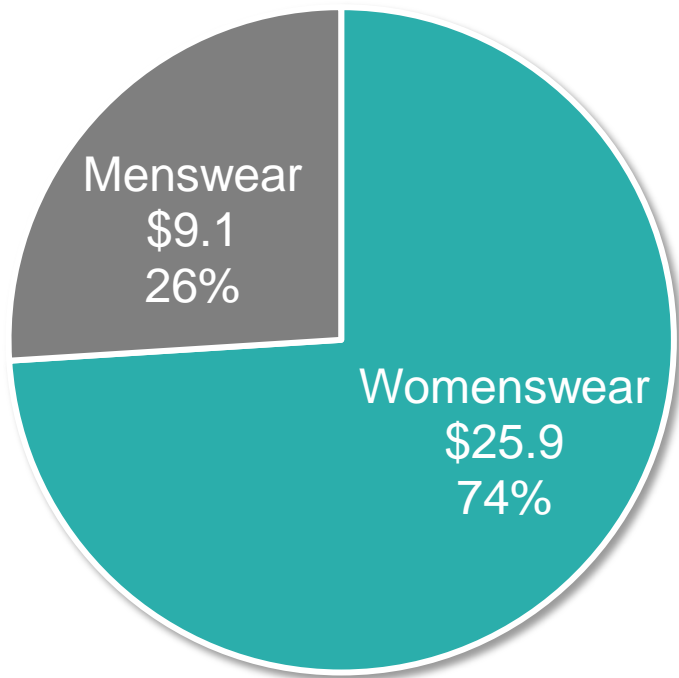
Cotton Opportunities in Women's Wear

Women's Wear Plan

- **Objective:** To develop breakthrough performance technology for knits
- **Background:** Price and style are the primary purchase drivers at retail
- **Priority:** Women's wear is the biggest opportunity for cotton in terms of bales and market share

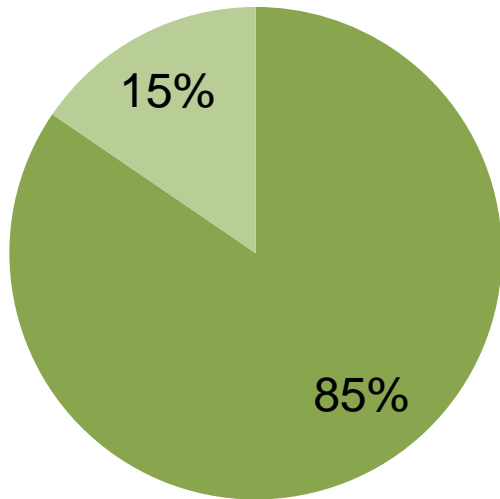
2010 U.S. Apparel Sales

In US\$ Billions



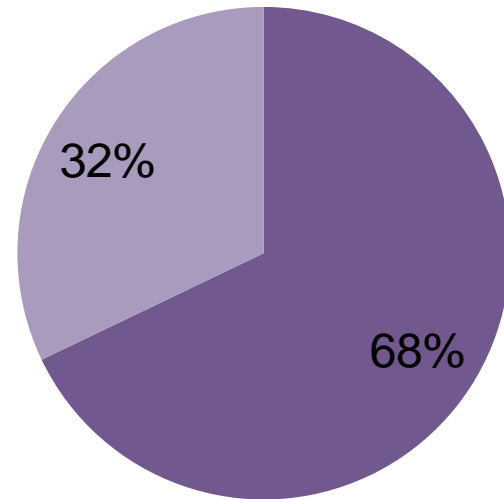
Cotton's Market Presence

Men's Clothing



- Contains Cotton
- Does Not Contain Cotton

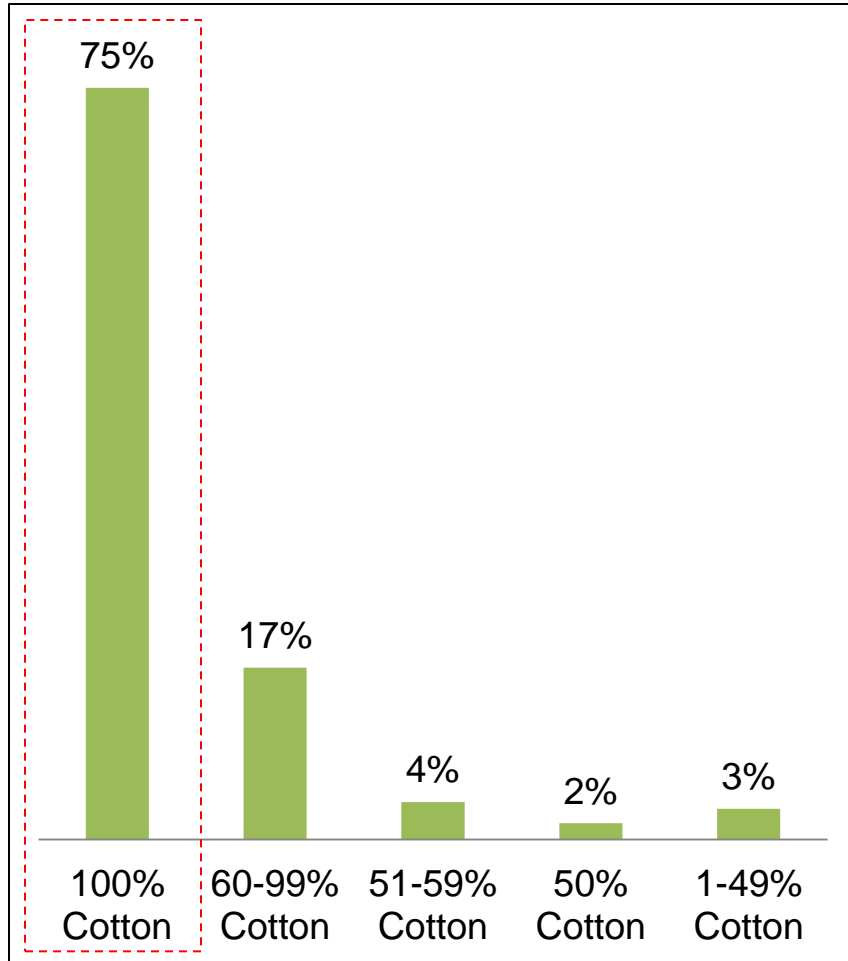
Women's Clothing



- Contains Cotton
- Does Not Contain Cotton

More 100% cotton in menswear

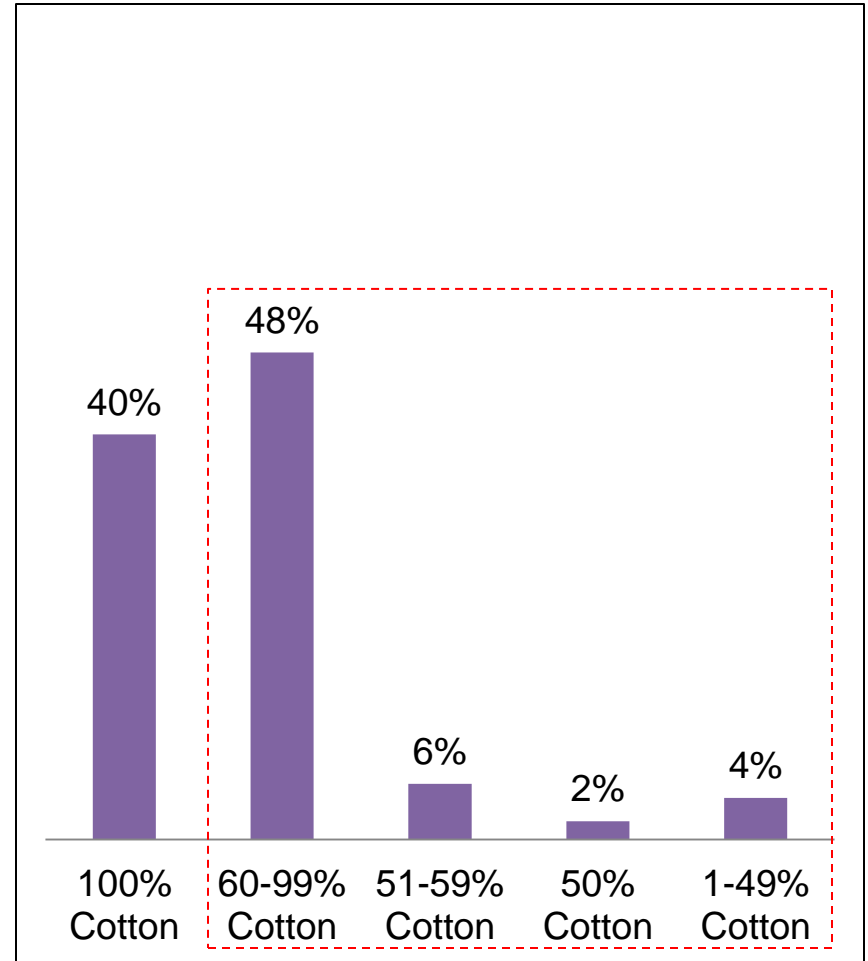
75% of men's cotton clothing is 100% cotton



% of men's cotton clothing that contains the specified cotton content

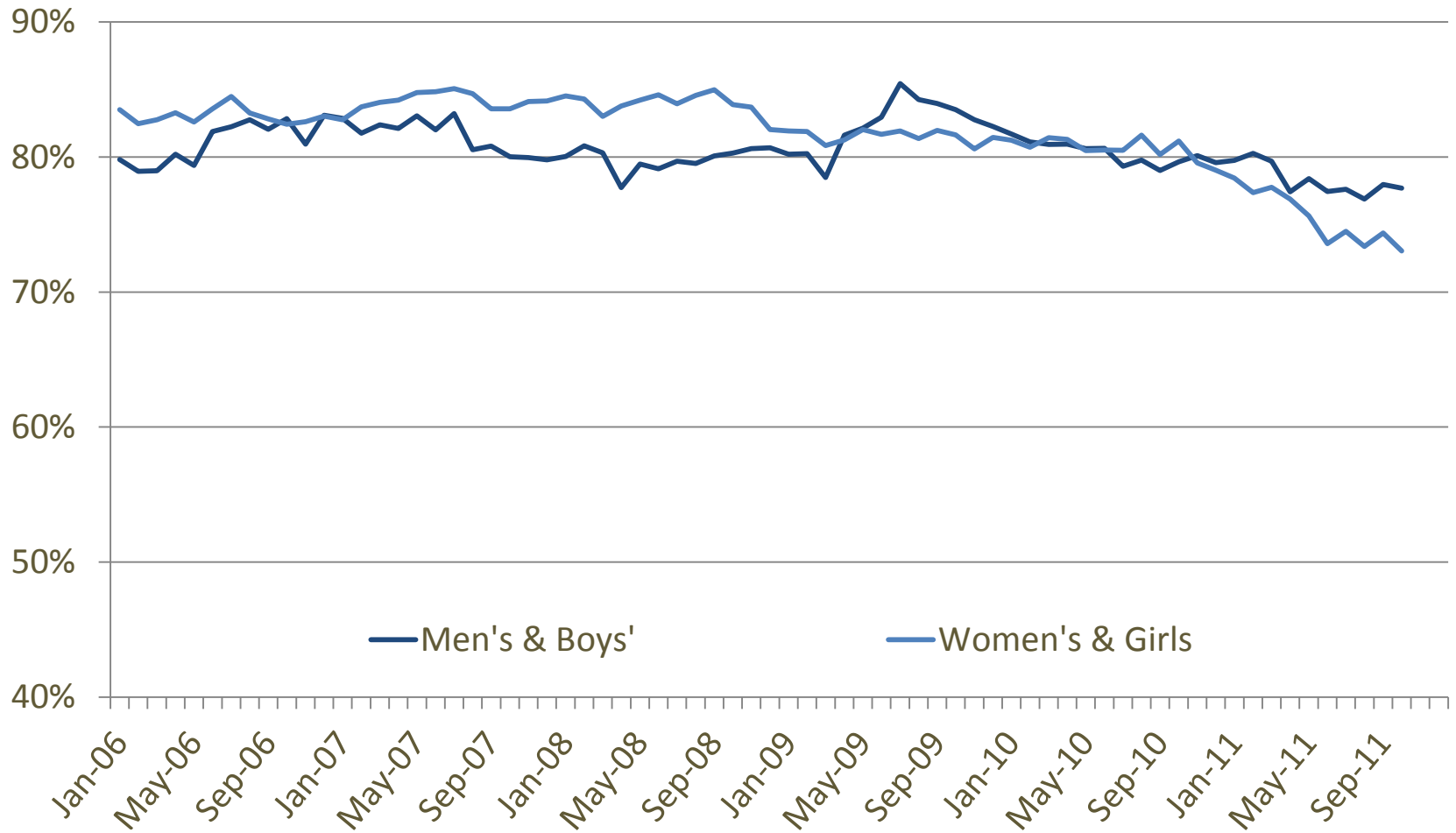
More cotton blends in womenswear

60% of women's cotton clothing is a cotton blend

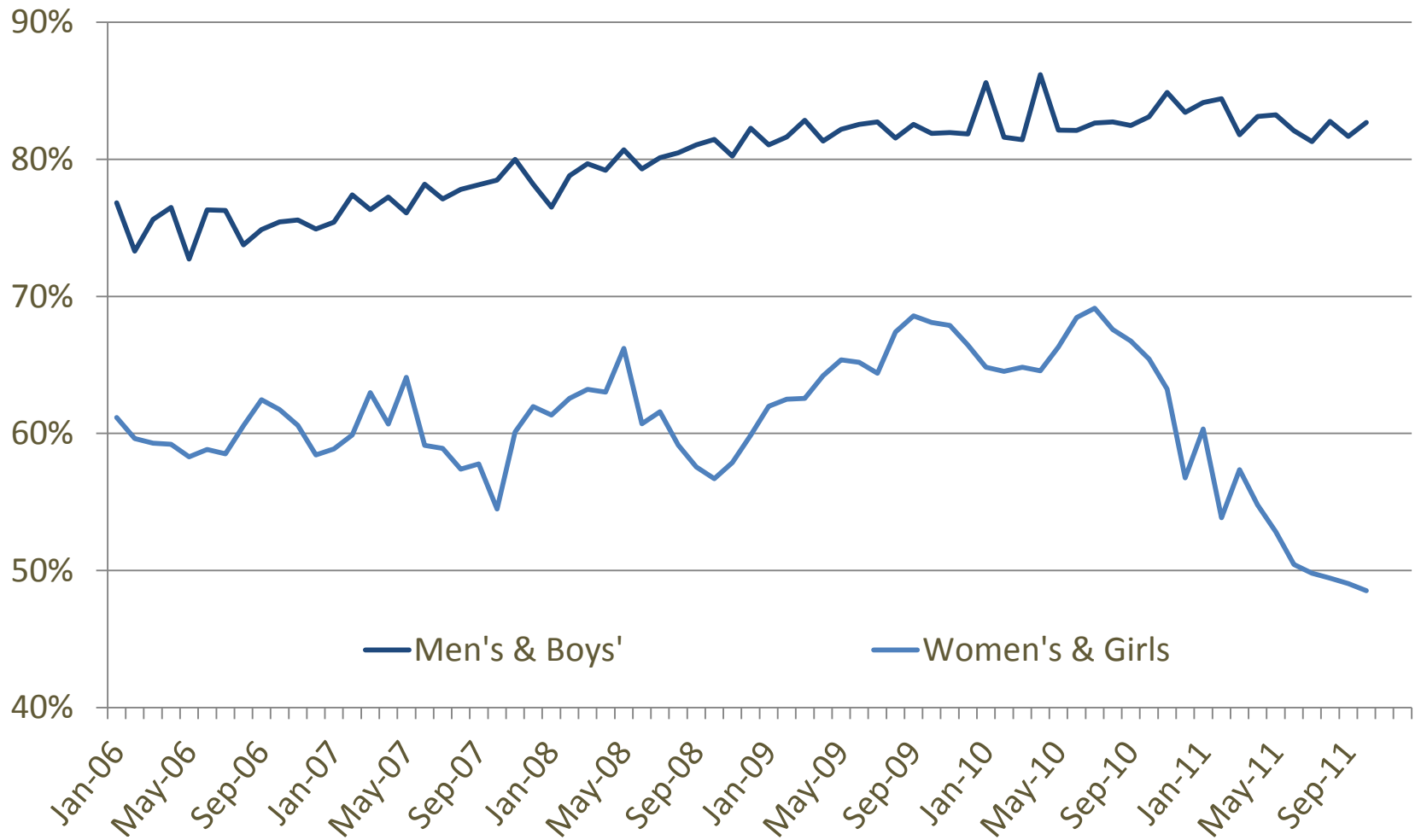


% of women's cotton clothing that contains the specified cotton content

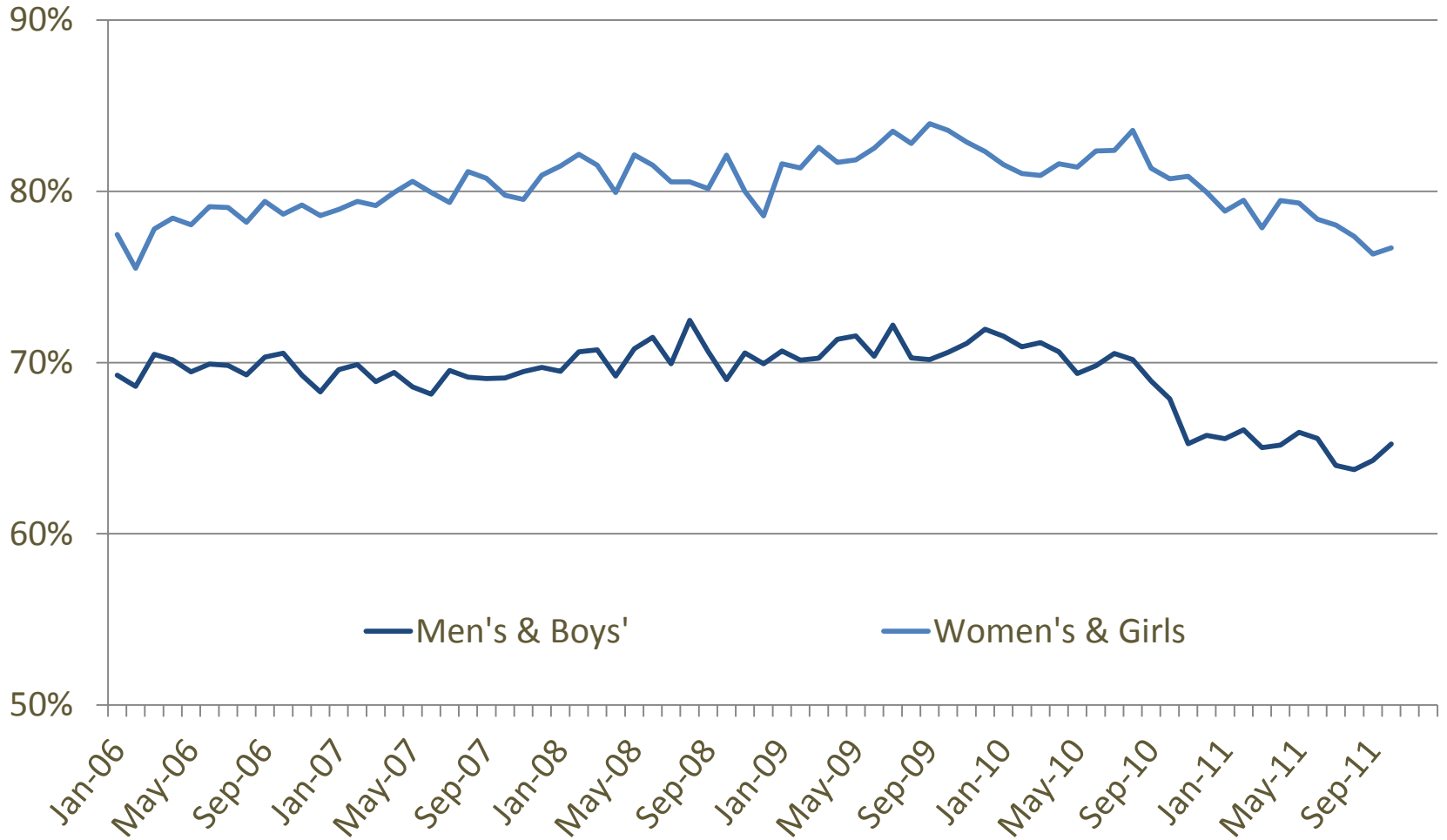
Declines in Cotton-Dominant Share of Women's & Girls Knit Tops Imports



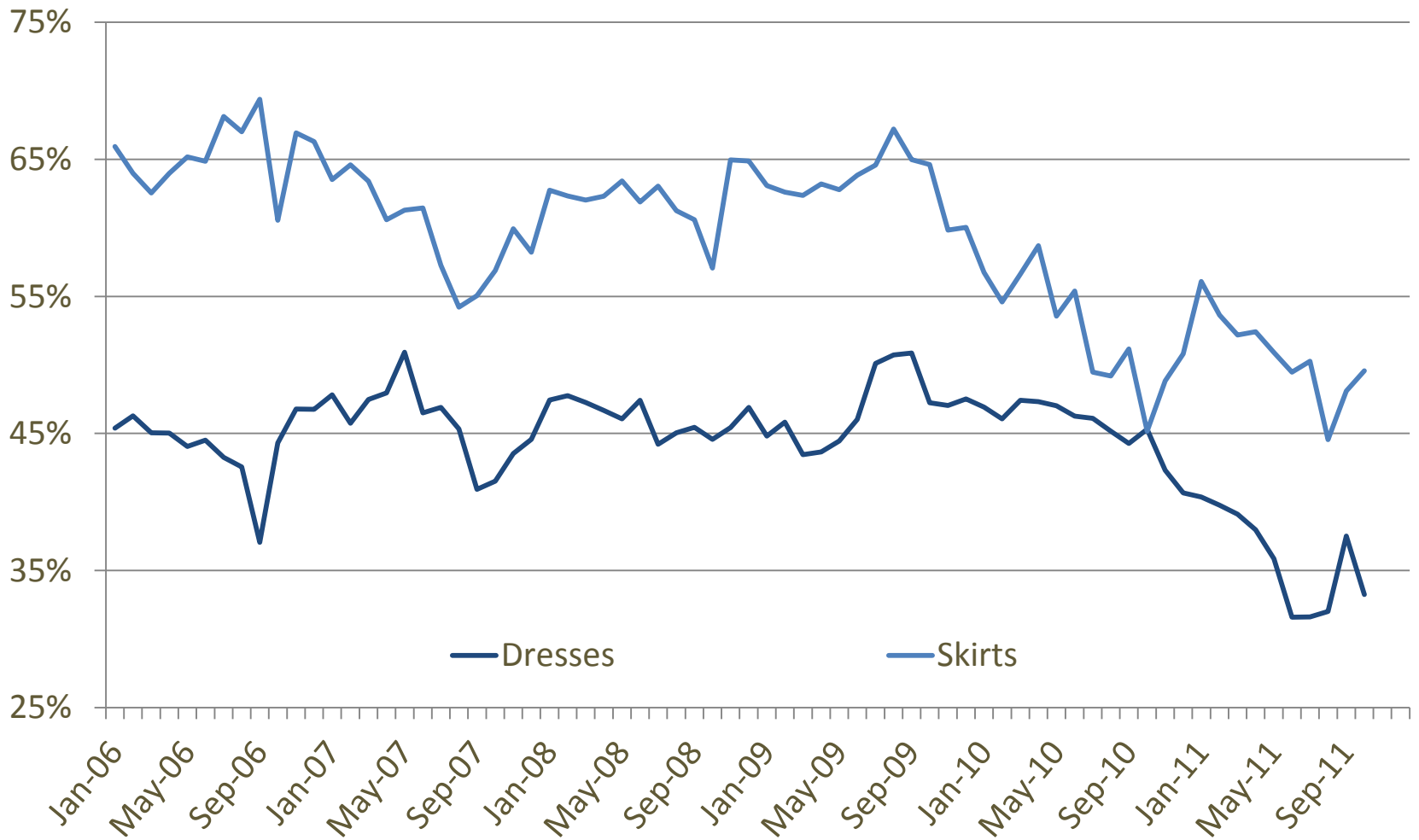
Declines in Cotton-Dominant Share of Women's and Girls Woven Tops Imports



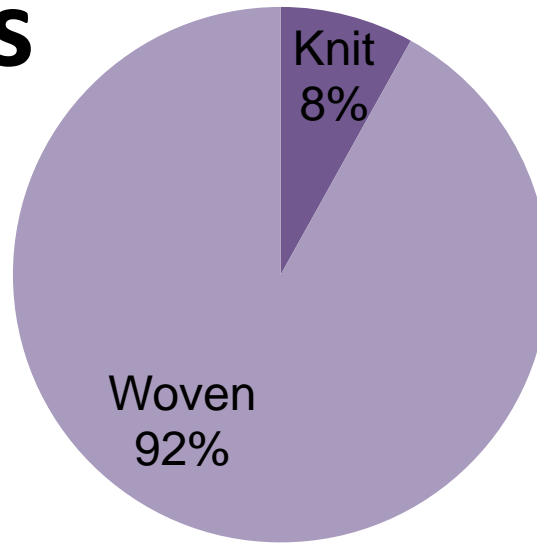
Declines in Cotton-Dominant Share of Women's and Girls Bottoms Imports



Declines in Cotton-Dominant Share of Dresses and Skirts

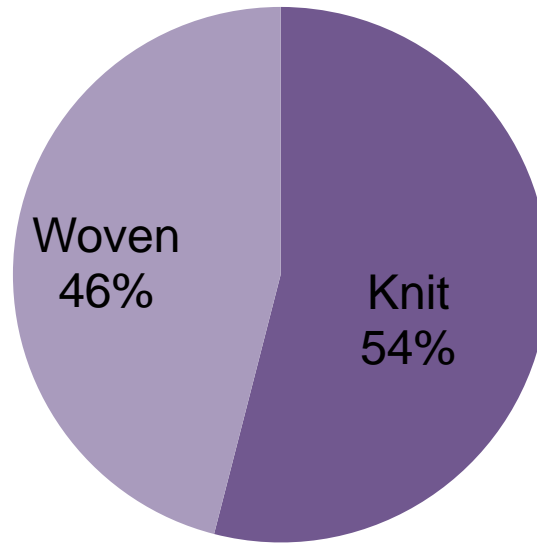


Dress Pants



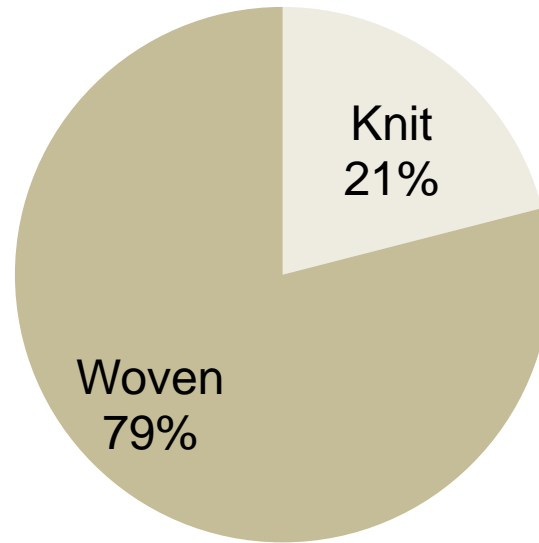
% Blended	Single Fibers	Blends
92%	Polyester	Polyester/Rayon/Spandex Rayon/Polyester/Spandex Polyester/Spandex Wool/Spandex Rayon/Spandex

Dresses



% Blended	Single Fibers	Blends	
62%	Polyester Rayon Silk Nylon	Polyester/Rayon/Spandex Polyester/Spandex Modal/Spandex Nylon/Spandex Silk/Spandex Nylon/Spandex	Rayon/Polyester/Spandex Rayon/Nylon/Spandex Rayon/Nylon Rayon/Polyester Rayon/Spandex Polyester/Rayon

Skirts



% Blended	Single Fibers	Blends
59%	Polyester Rayon	Polyester/Rayon/Spandex Polyester/Spandex Polyester/Rayon Rayon/Nylon/Spandex Rayon/Nylon Rayon/Spandex

Opportunities to Increase Cotton's Presence in Womenswear



	% of clothing that does not contain cotton
Dress Pants	70%
Dresses	62%
Skirts	55%
Knit Blouses	52%

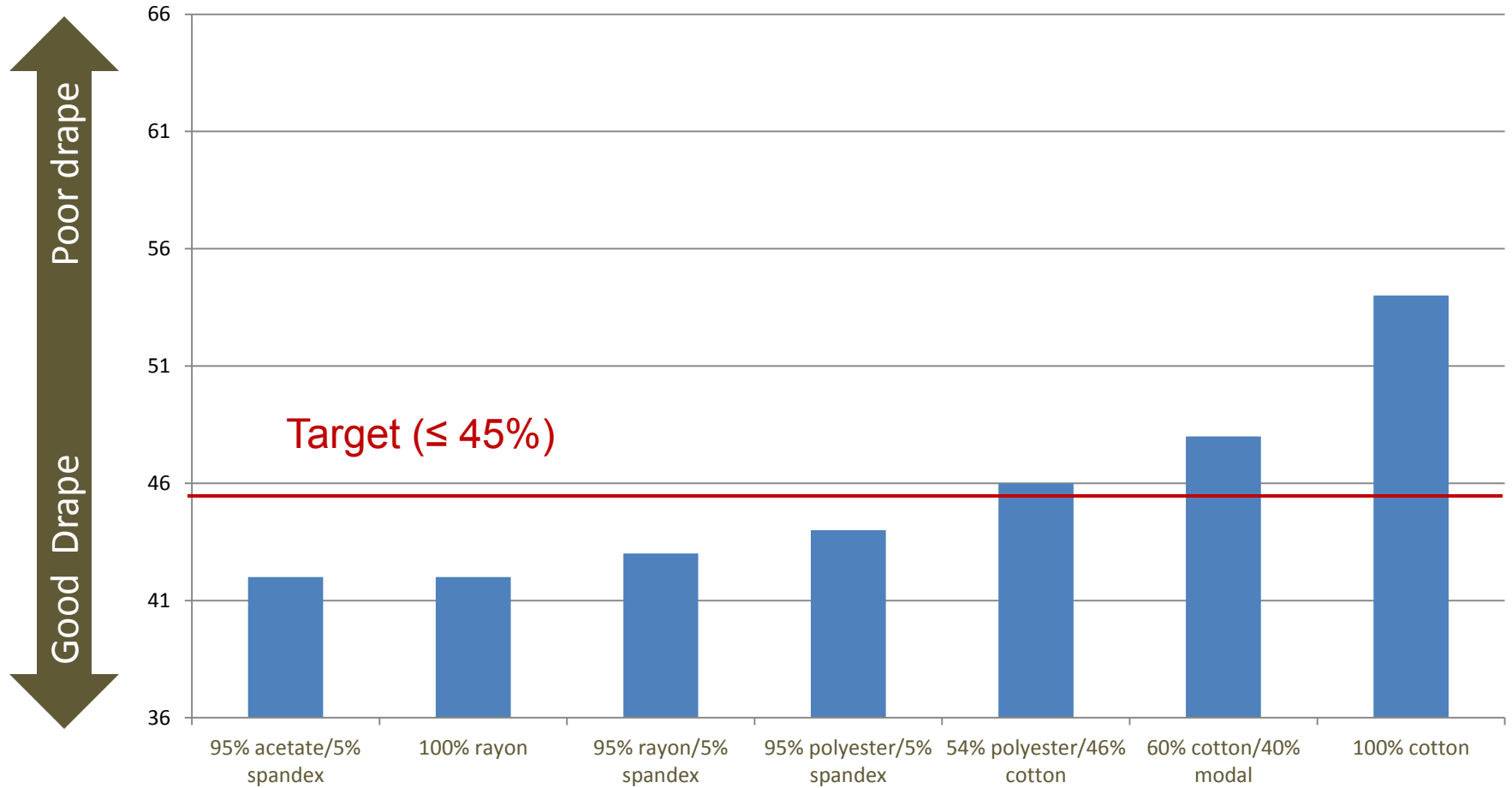
Areas of Interest

- Fabric Drape
 - Drape is a top purchase driver and is grouped with overall fit of garment.
- Wrinkling Performance
 - Improved wrinkle performance for cotton garments will promote a sense of easy care and low maintenance.
 - AATCC 128 (Dry Wrinkle Recovery)
 - AATCC 124 (Wash and Wear Smoothness)

Drape Results

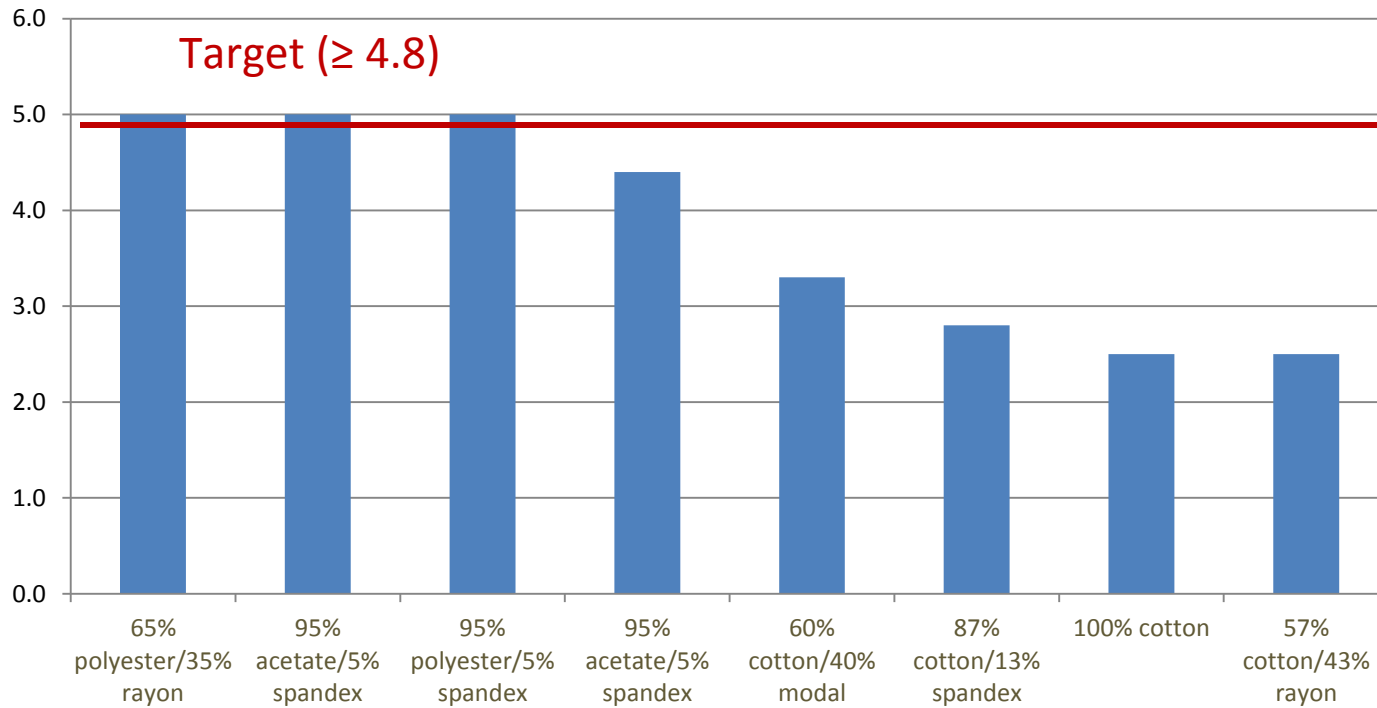
(testing performed on garments from retail)

36 = best possible rating



Wrinkle Recovery Results

(testing performed on garments from retail)



Thank You



Cotton
Incorporated