

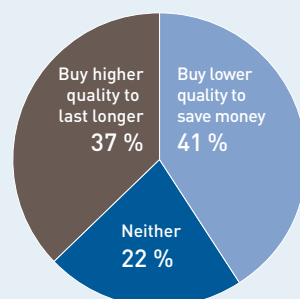
Trends in Fashion Consumption: What Drives Consumers in the USA, China, and Mexico

Recent surveys by Cotton Incorporated have shed light on consumer behaviour in the USA, China and Mexico, revealing that: Emotions, economic uncertainty and the desire for quality influence clothing purchasing decisions worldwide.

The studies are based on country-specific online surveys of around 1,000 people per country conducted in May 2025. The surveys capture the emotional, economic and behavioural aspects of fashion consumption, offering a comparative analysis of international consumption patterns.

During the past month, have you* been more likely to:

*Among those people that purchased clothes in the past month



In the **USA**, 44 percent of respondents said that their emotions had a strong influence on their shopping behaviour, which is an increase on the previous year. Concerns about personal circumstances, finances and the future dominate. Despite these uncertainties, fashion remains relevant. Almost a quarter are spending more on clothes, with T-shirts and casual wear proving particularly popular. Sustainability is playing an increasingly important role, with 37 percent of consumers now prioritising quality over quantity.

Source: Cotton Incorporated



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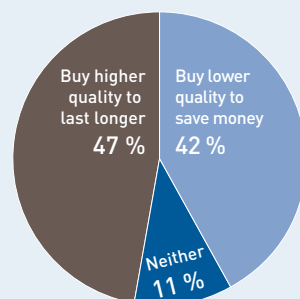
A cautious consumer sentiment is evident in **China** as well. Consumers are more optimistic overall, but they are paying close attention to quality and conscious consumption. There is a growing willingness to buy long-lasting clothing. 27 percent of consumers are specifically seeking information about the materials and origin of textiles, a trend that creates opportunities for natural fibres such as cotton.

Source: Cotton Incorporated



During the past month, have you* been more likely to:

*Among those people that purchased clothes in the past month



In **Mexico**, the financial burden of rising living costs is a key issue. The proportion of people who favour higher-quality, longer-lasting products and those who buy lower-quality products for cost reasons is almost balanced. T-shirts and leisurewear are also particularly popular here.

Source: Cotton Incorporated

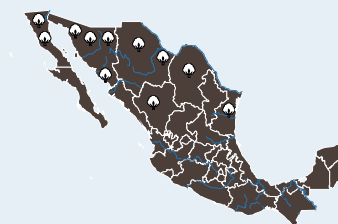


Photo: Adobe Firefly/BBB

92 Million Tonnes Each Year: Global Need For Change in the Handling of Urban Used Textiles

Since January 2025, member states of the European Union have been required to establish systems for the separate collection of used textiles. However, Australia and the USA, the largest producers of textile waste per capita, do not have such a system in place. As most donated clothing is later exported or disposed of, the authors of the study “Urban Transitions Towards Sufficiency-Oriented Circular Post-Consumer Textile Economies” are calling for a rethink in the way fashion waste is handled.

Currently, 92 million tonnes of textile waste are generated worldwide every year, and this figure could double by 2030. The main causes of textile waste in cities are over-consumption and oversupply. Collected used textiles are exported to other countries in varying proportions. This ranges from 33 percent for Australia to 97 percent for Norway. The study, published in the journal *Nature Cities*, investigated what happens to clothing and other textiles when consumers in selected cities in Europe, North America, and Oceania no longer need them.

In most Western cities, the situation is the similar: textile waste is exported or dumped elsewhere. Many charities also receive large quantities of old clothes, but due to their poor quality, it is usually not worthwhile to recycle them locally — only high-quality items are sold; the rest end up being disposed of or exported.

Dr Yassie Samie, a co-author of the study from RMIT University in Australia, calls for better coordination between local government agencies and charities. “We are used to charities taking on the arduous task of sorting old clothes, but they have long been unable to cope with the volumes of donated clothing,” said Dr Samie.

Municipal approaches to handling used textiles

Of the Australian cities surveyed, most local authorities only provide public spaces and licences for charitable collections and commercial resellers. In Melbourne, the city council sends textile waste directly to landfill instead of recycling or reusing it. “This shows that there are

insufficient mechanisms and incentives to bring about real system change,” emphasises Dr Samie.

A different model in Amsterdam: The city ensures the active collection of all textiles – even those unsuitable for reuse.

Alternatives for fast fashion

Dr Samie emphasises the importance of creating incentives for local alternatives to fast fashion, such as resale, exchange and repair. According to the researcher, sustainable providers, such as second-hand retailers, struggle to compete with large, financially well-positioned brands, despite their potential for waste avoidance. There is insufficient support for these providers. France has prohibited fast fashion advertising – a measure the study’s authors believe could contribute to cutting textile waste on a global scale.

“Urban transitions towards sufficiency-oriented circular post-consumer textile economies” from Katia Vladimirova, Yassie Samie, Irene Maldini et al., published in *Nature Cities* (DOI: 10.1038/s44284-024-00140-7).

COTTON NEWS

High Electricity Costs and Industrial Decline Shape Europe's Cotton Textile Market

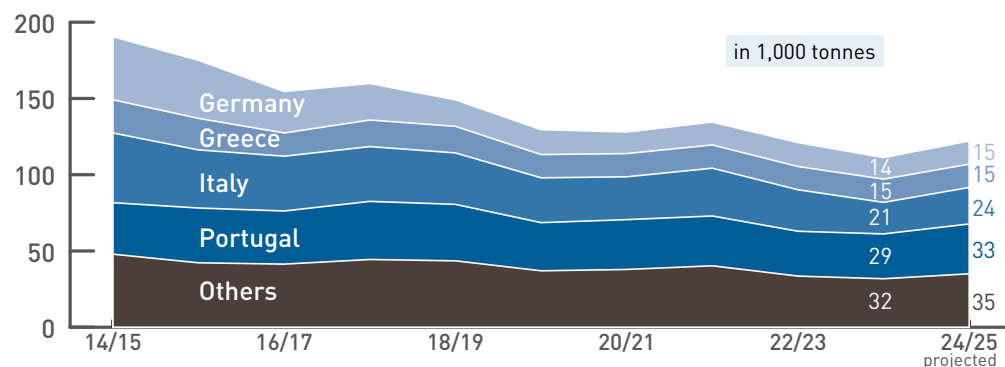
Despite high costs and a declining textile industry, cotton consumption in the European Union rose to 127,000 tonnes in 2024/25, which is nine percent or 11,000 tonnes more than in 2023/24.

Cotton consumption in Portugal rose by 4,000 tonnes to 33,000 tonnes and in Italy it increased by 3,000 tonnes to 24,000 tonnes. In Germany, Greece and Spain, 15,000 tonnes were used in the 2024/25 financial year. In six other EU countries, namely France, Poland, Belgium, the Netherlands, Bulgaria and Latvia, an additional 24,000 tonnes of cotton were processed in 2024/25.

In the 2007/08 financial year, when global consumption reached a record high of 27 million tonnes, cotton consumption in the same countries that now belong to the EU amounted to 450,000 tonnes. Since 2007/08, the largest industries at that time, Italy, Greece and Spain, have shrunk the most in absolute terms, but cotton textile production has declined significantly in all EU countries. High electricity costs are an extreme threat to the textile industry in Germany and Greece.

Sources: Bremen Cotton Exchange, Annual Report 2024; USDA

COTTON CONSUMPTION IN THE EUROPEAN UNION 2014/15 TO 2024/25



Source: USDA, PSD Online, 14 January 2025; Graphic: BBB

INTERNATIONAL
Cotton
CONFERENCE
BREMEN 2026
25th-27th March



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The International Cotton Conference Bremen is a leading platform for exchange throughout the entire cotton and textile value chain. **Share your expertise** by giving presentations, displaying posters or contributing to panel discussions and events during the Bremen Cotton Week.

Further details, including information on how to submit proposals, can be found on the conference website. The deadline for submissions is **31 August 2025**.

LET'S
TALK
ABOUT
COTTON.

Photo: BBB

SPOTLIGHT ON COTTON COUNTRIES

Mexico: Severe Drought and Rising Costs Drive Cotton Production Down

Post, the Foreign office of the US Department of Agriculture (USDA), forecasts marketing year (MY) 2025/26 cotton production at 187,200 tonnes, a 16 percent decrease compared to the previous MY due to high input costs, severe drought conditions, low international cotton prices, power outages, and lack of access to new genetically engineered seed varieties. MY 2025/26 cotton consumption is forecast unchanged from the previous year primarily on slow domestic demand growth and increased competition from synthetic fibres and yarn imports from Asia. The planted area is forecasted to decrease as farmers switch to other crops, due to more attractive market prices.

Despite cotton being an attractive alternative crop under current drought conditions, due to relatively lower water needs, farmers are not projected to increase planted



area in MY 2025/26 due to low profitability and high input costs. Cotton producers face low cotton-fiber prices, high price inflation for inputs (prices on average 20 percent higher for inputs such as herbicides, pesticides, seeds, fertilizers, and fuel), and lack of access to new GE seeds. Moreover, a severe boll weevil infestation in southern Tamaulipas threatens cotton planting even further. The USDA forecasts total planted area at 106,550 hectares in MY 2025/26, a reduction of 15 percent from the MY 2024/25 estimate.

Impact of Imports and Consumer Behavior on Cotton Demand

USDA's Post forecasts MY 2025/26 cotton consumption – which is primarily driven by yarn demand from the textile industry – at 304,800 tonnes, unchanged from the previous marketing year. This projection is significantly below the pre-pandemic levels of 390,000 to 410,000 tonnes and is based on slow growth in domestic textile demand, competition from lower priced textile imports, and trade policy uncertainty impacting textile production decisions.

Lower-cost textile imports from Asia, supported by low shipping costs, have saturated the Mexican market, causing mill closures and reduced cotton demand. Fast fashion via digital platforms further challenge domestic producers. The Mexican government has imposed tariffs and restrictions on imports and digital sales to protect the textile industry, aiming to boost local textile and cotton consumption.

With about 40 percent of Mexico's fabric exports going to the United States, industry sources report that several factories have begun to adjust their operations in response to uncertainty around potential new U.S. tariffs.

Source: USDA, Cotton and Products Annual Mexico, April 2025

CICCA UNFULFILLED AWARDS LIST

Revision: List No. 548 of 12 August 2025

List of firms having failed to fulfil arbitration awards made by CICCA* Member Associations. Changes since list no. 547 of 02 July 2025.

Additions			
Pakistan	National Spinning Mills	12 May 2025	ICA
Pakistan	Arshad Textile Mills Ltd	10 June 2025	ICA
Deletions			
Brazil	Leandro Volter Laurindo de Castilhos, Barreiras (BA)	28 Nov 2008	ICA

*] Committee for International Co-operation between Cotton Associations, Liverpool/GB
ICA = International Cotton Association, Liverpool/GB

Complete
CICCA Unfulfilled
Awards List:

IMPRINT

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BREMEN VALUE DIFFERENCES
The value differences of the Bremen Cotton Exchange No. 2/23 according to Bremen Cotton Report No. 29/30 of 03 August 2023 remain in force until further notice. They can be found on the [website](#) of the Bremen Cotton Exchange.

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STATISTICS



Cotton samples © BBB

Cotton World Supply, Use, and Trade (1,000 MT)

Season Beginning August 1	2021/22	2022/23	2023/24	2024/25	July 2025/26	August 2025/26
PRODUCTION						
China	5,813	6,695	5,955	6,967	6,750	6,858
India	5,291	5,726	5,530	5,225	5,117	5,117
Brazil	2,356	2,552	3,172	3,701	3,974	3,974
United States	3,815	3,150	2,627	3,138	3,179	2,877
Pakistan	1,306	849	1,524	1,089	1,089	1,089
Australia	1,274	1,263	1,089	1,219	893	893
Türkiye	827	1,067	695	860	784	784
Other	4,211	3,945	3,916	3,743	4,000	3,802
Total	24,894	25,247	24,508	25,943	25,783	25,392
DOMESTIC USE						
China	7,272	8,208	8,470	8,274	7,947	8,165
India	5,443	5,334	5,552	5,443	5,552	5,443
Pakistan	2,330	1,894	2,112	2,351	2,373	2,373
Bangladesh	1,916	1,676	1,687	1,785	1,829	1,764
Vietnam	1,459	1,404	1,437	1,720	1,742	1,742
Türkiye	1,872	1,633	1,437	1,546	1,589	1,546
Brazil	694	695	733	762	762	762
Other	4,201	3,681	3,599	3,800	3,923	3,894
Total	25,187	24,527	25,028	25,682	25,718	25,688
IMPORTS						
Bangladesh	1,840	1,524	1,649	1,764	1,829	1,764
Vietnam	1,444	1,409	1,434	1,720	1,742	1,742
Pakistan	980	980	697	1,328	1,285	1,285
China	1,694	1,357	3,261	1,121	1,263	1,154
Türkiye	1,203	912	776	958	1,045	1,002
India	218	376	193	642	653	631
Indonesia	561	362	402	403	435	435
Other	1,405	1,297	1,179	1,360	1,477	1,477
Total	9,344	8,217	9,591	9,296	9,728	9,489
EXPORTS						
Brazil	1,682	1,449	2,680	2,835	3,113	3,113
United States	3,059	2,711	2,558	2,591	2,722	2,613
Australia	778	1,347	1,250	1,110	1,089	1,089
Mali	388	239	229	250	261	261
Benin	283	163	256	223	283	261
India	815	239	503	305	218	218
Türkiye	123	187	302	294	218	218
Other	2,171	1,627	1,877	1,630	1,826	1,717
Total	9,299	7,963	9,654	9,238	9,730	9,490
ENDING STOCKS						
China	7,439	7,262	7,995	7,793	8,071	7,625
India	1,828	2,357	2,025	2,144	2,123	2,231
United States	1,088	1,047	924	1,074	911	911
Brazil	446	855	615	721	930	820
Australia	1,002	1,012	686	871	1,002	784
Argentina	339	400	475	512	556	572
Pakistan	419	332	403	457	446	446
Other	2,917	3,244	2,850	2,767	2,796	2,704
Total	15,478	16,510	15,972	16,340	16,835	16,093



Internationale Geschäfte beginnen in der Heimat.



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zahlungsverkehr



Außenhandels-
finanzierung



Währungs-
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geschäfte



Zins-
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