



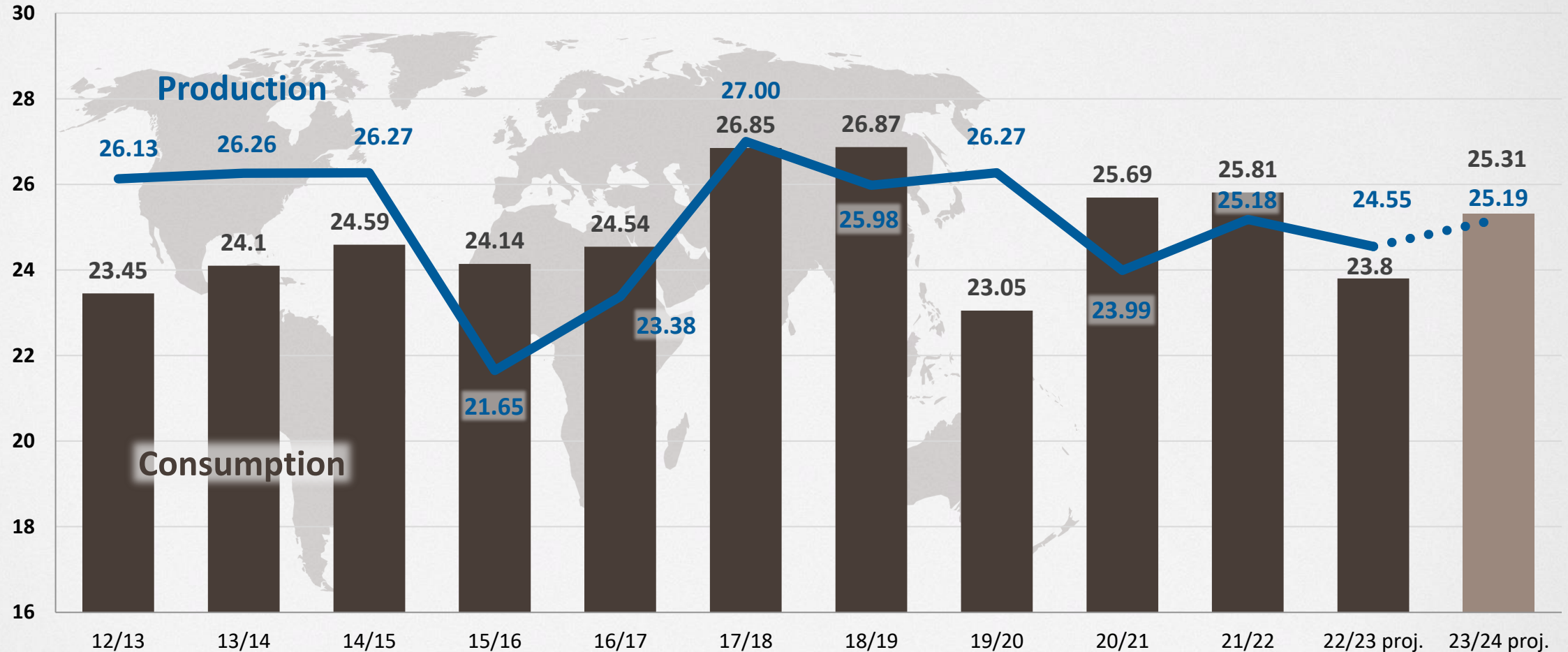
## WORLD COTTON MARKETS AND FUTURE FIBRE TRENDS

FRITZ GROBIEN  
Vice President Bremen Cotton Exchange

CIRFS May 2023

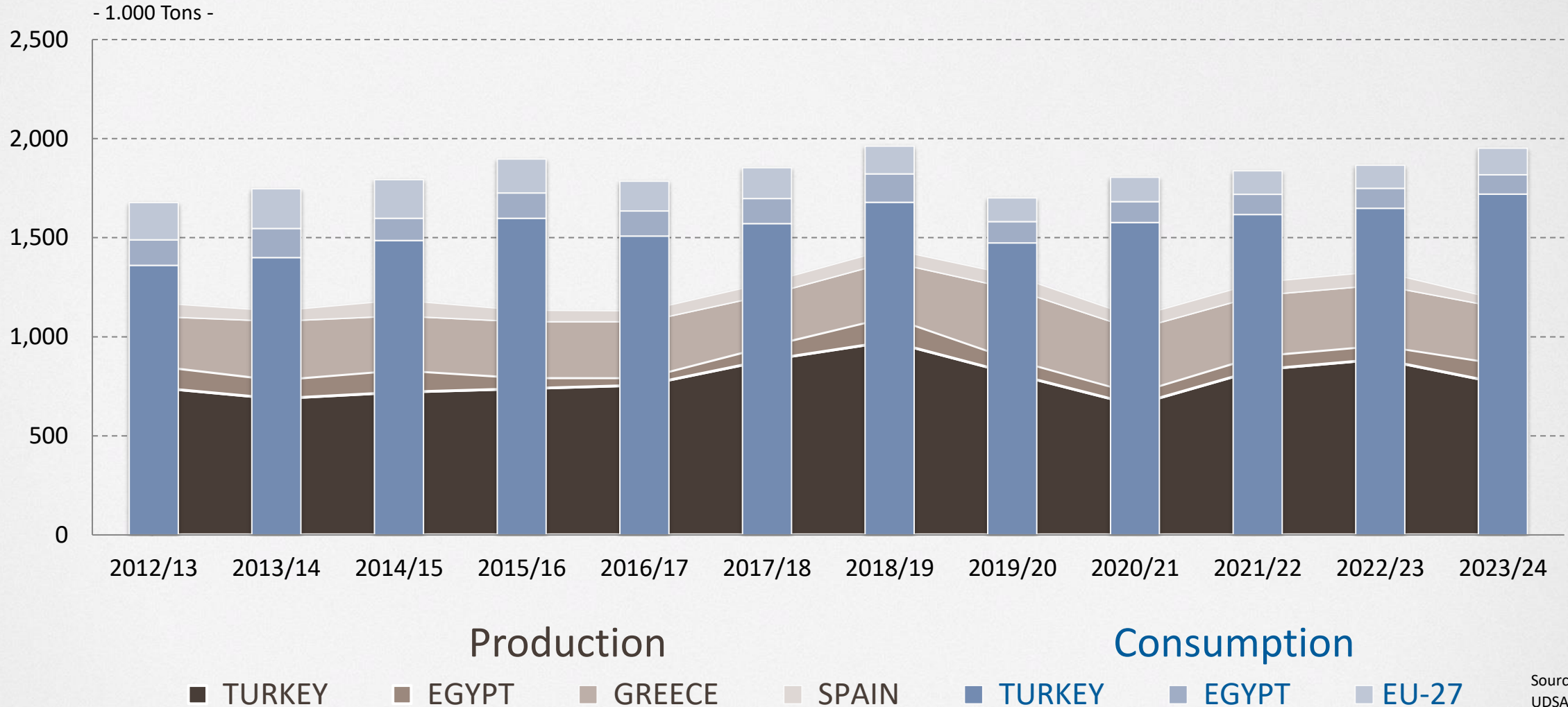
# WORLD COTTON PRODUCTION AND CONSUMPTION since 2012/13

Million tons



Source: ICAC;  
 USDA for 23/24 proj.

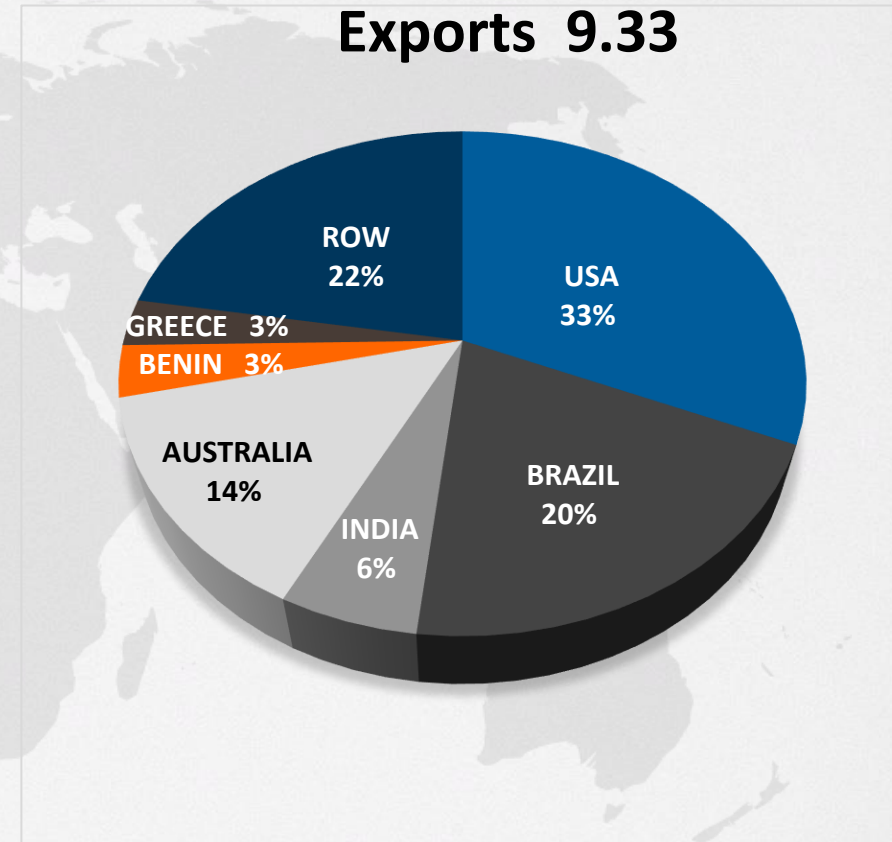
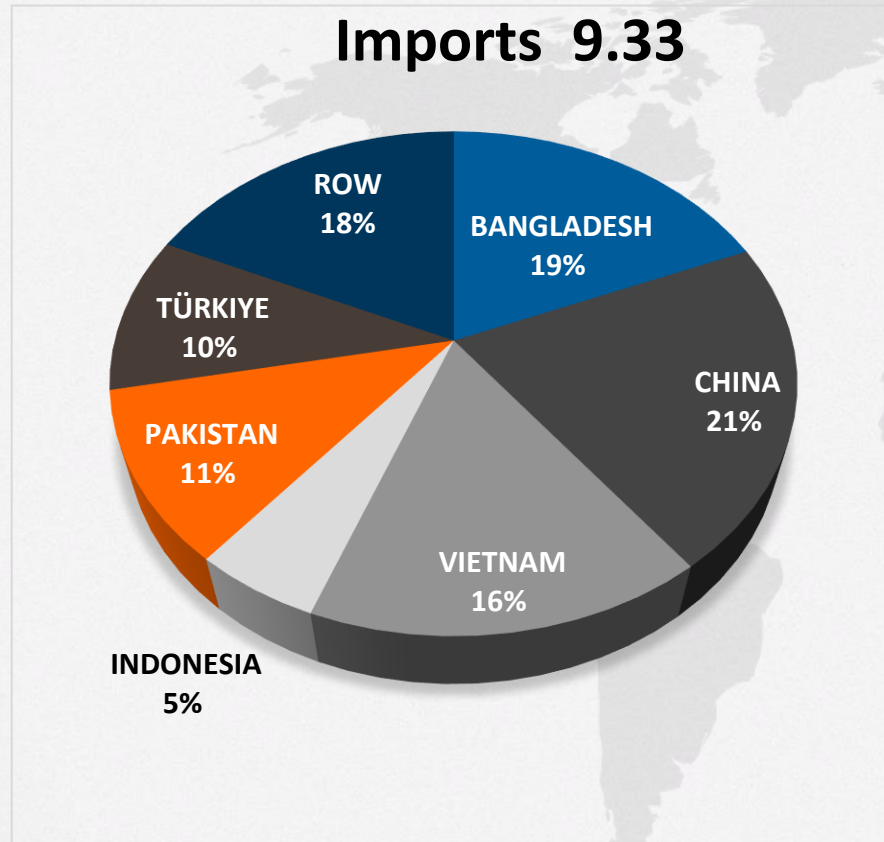
# EU/MEDITERANIAN COTTON PRODUCTION AND CONSUMPTION



Source: ICAC; UDSA for 2023/24

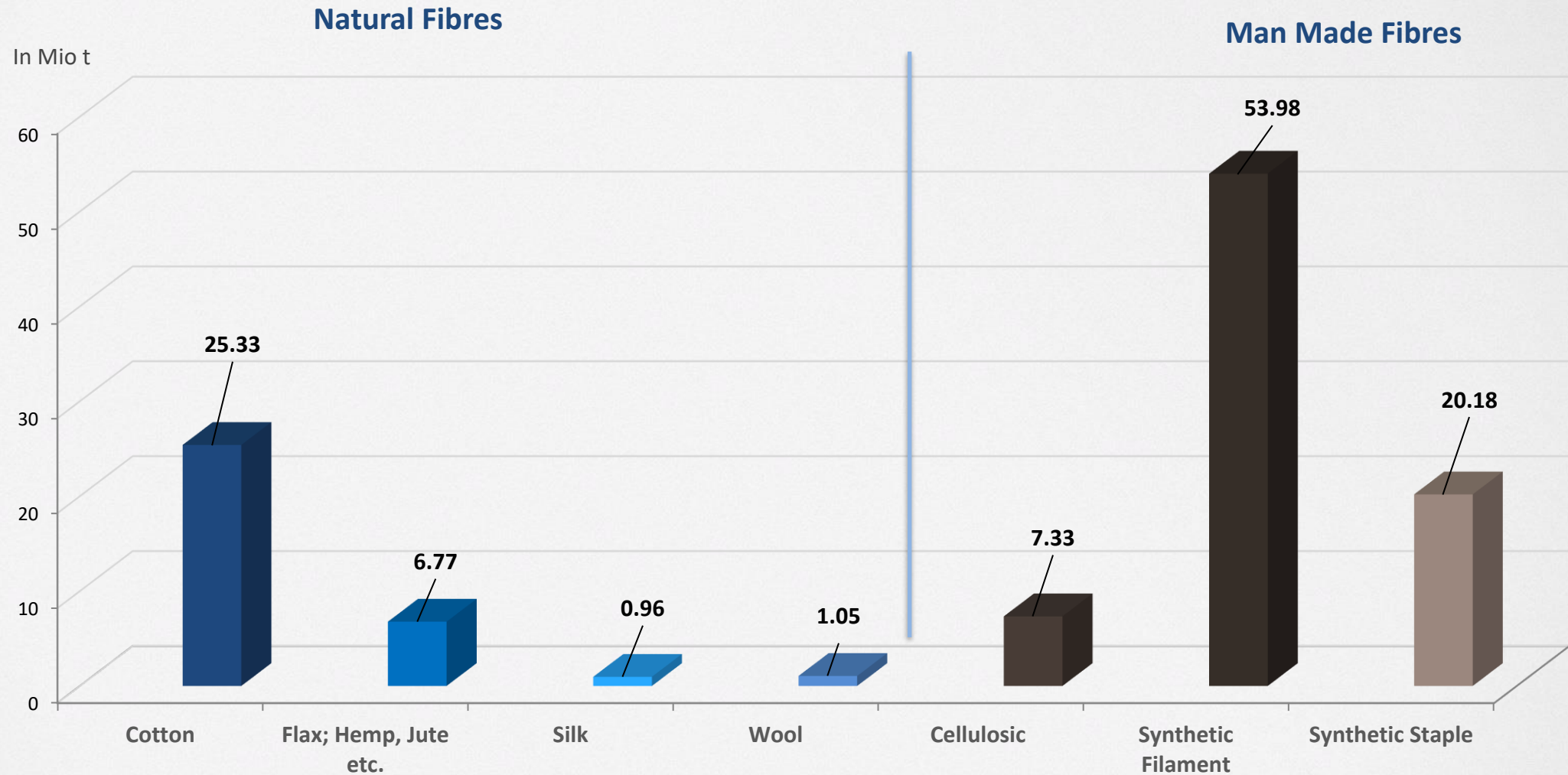
# WORLD COTTON TRADE 2022/23 (projected)

- million Tons -

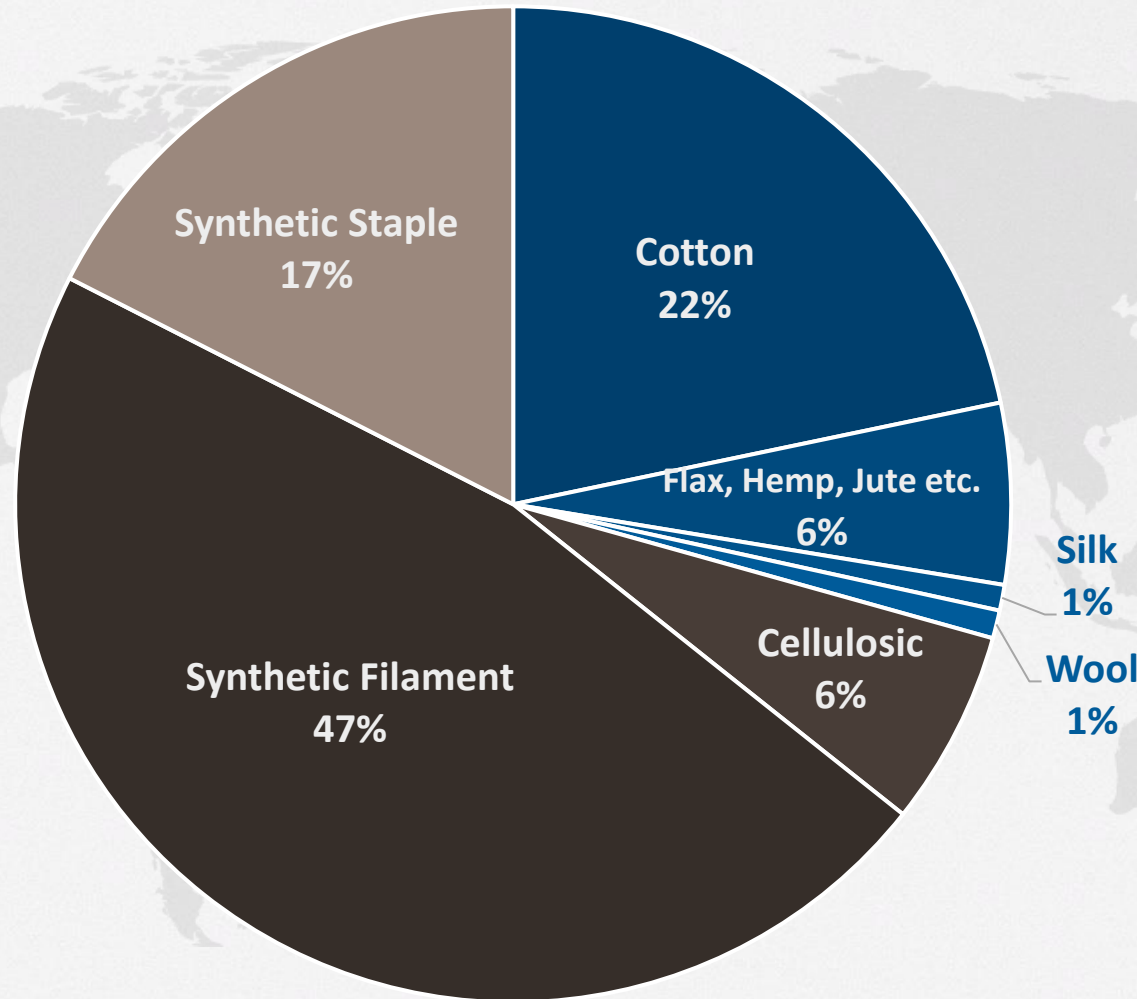


Source: USDA 05/23

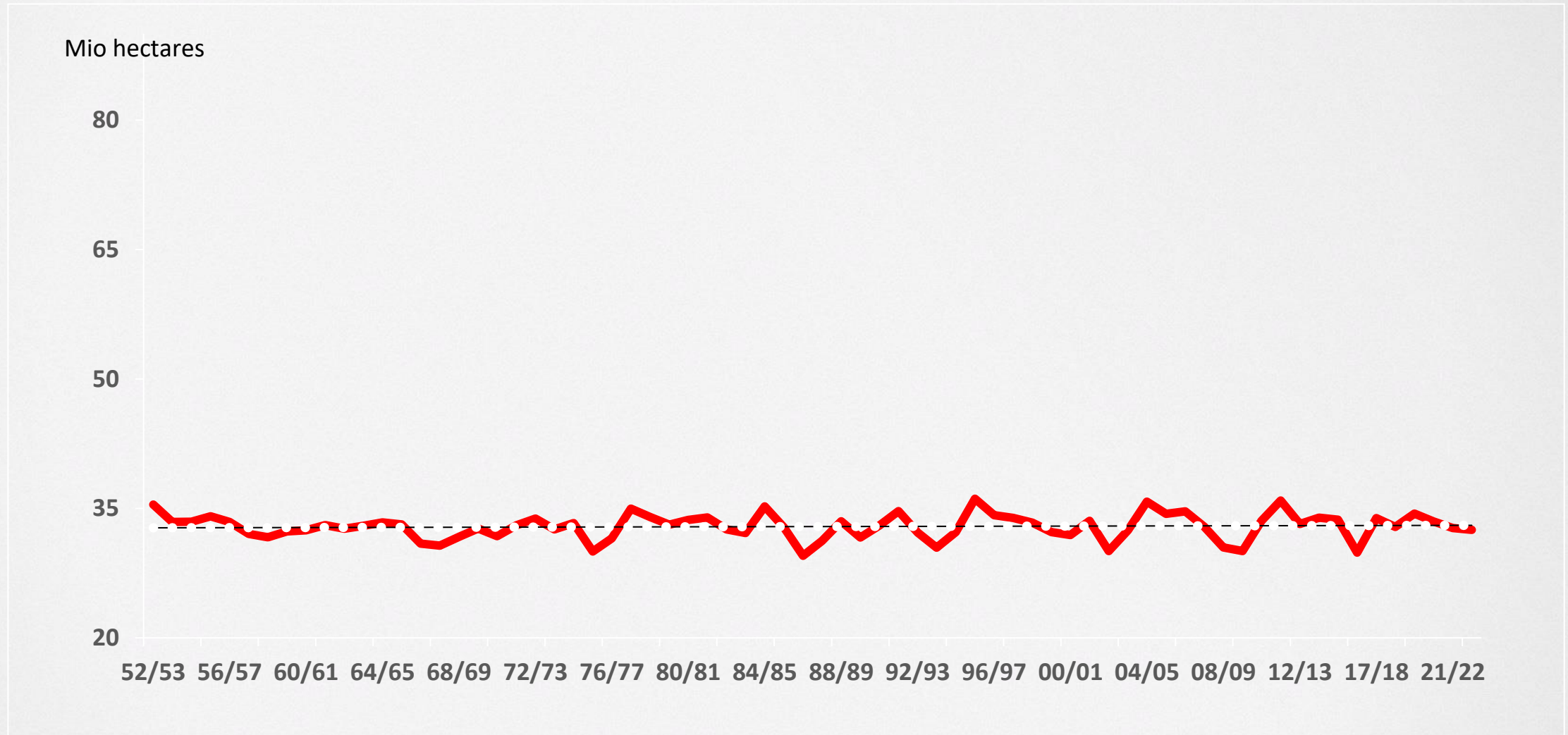
# FIBER PRODUCTION WORLD 2023 proj.



# FIBER PRODUCTION WORLD 2023 proj. (Shares)

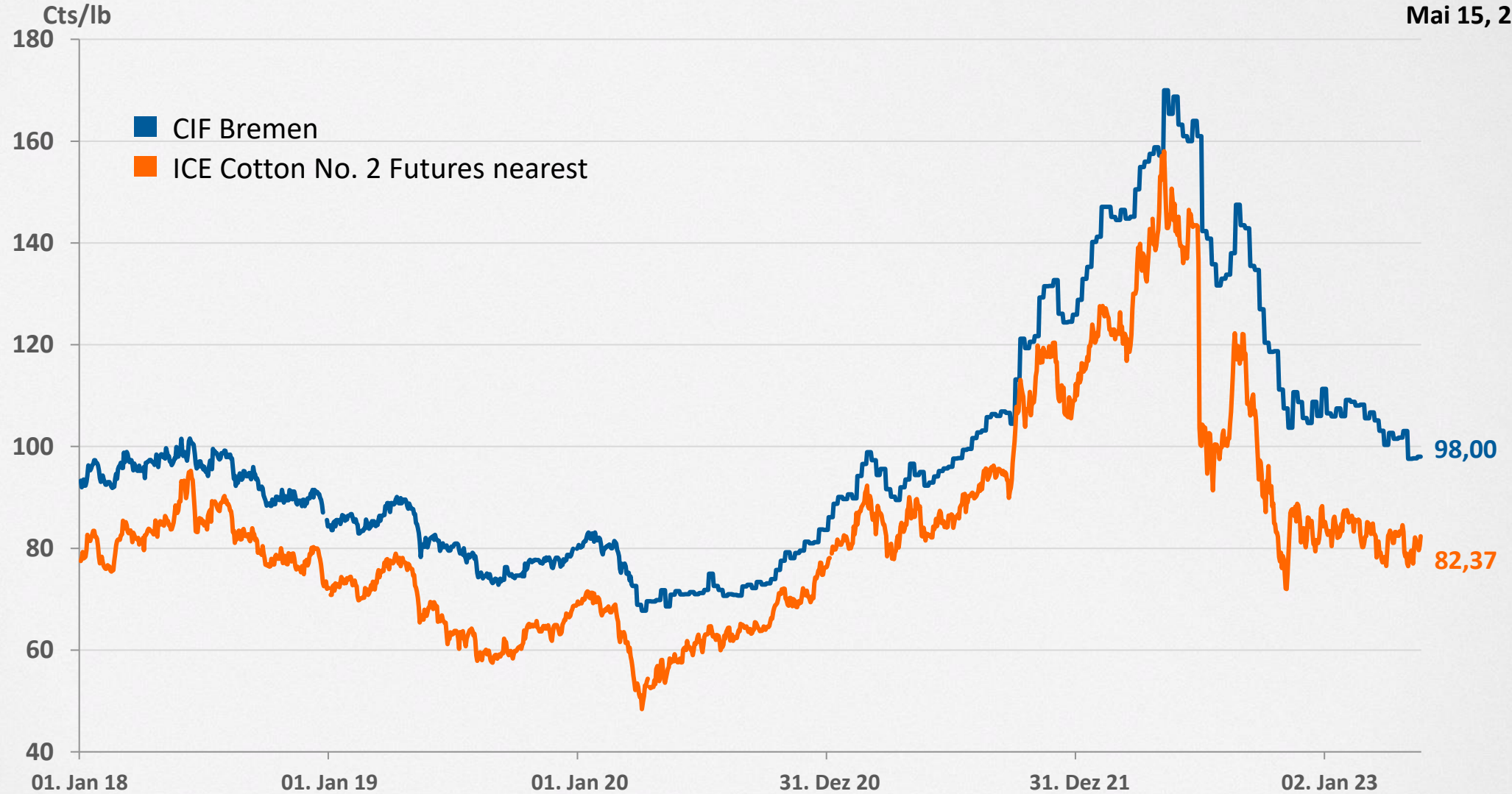


# WORLD COTTON AREA SINCE 1951



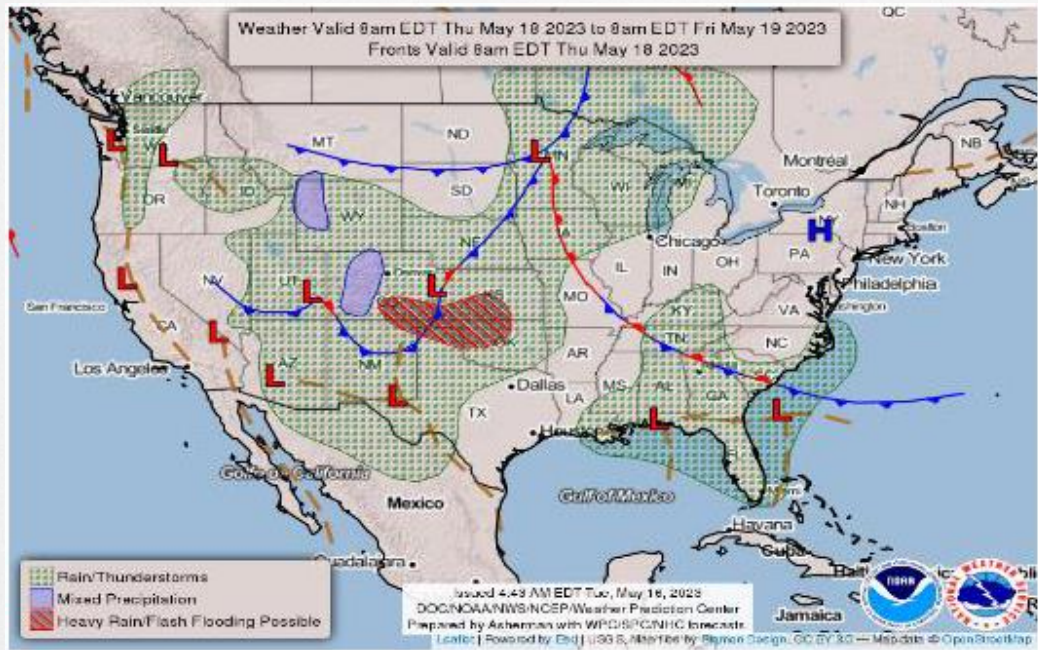
# CIF BREMEN / ICE COTTON NO. 2 FUTURES

Mai 15, 2023





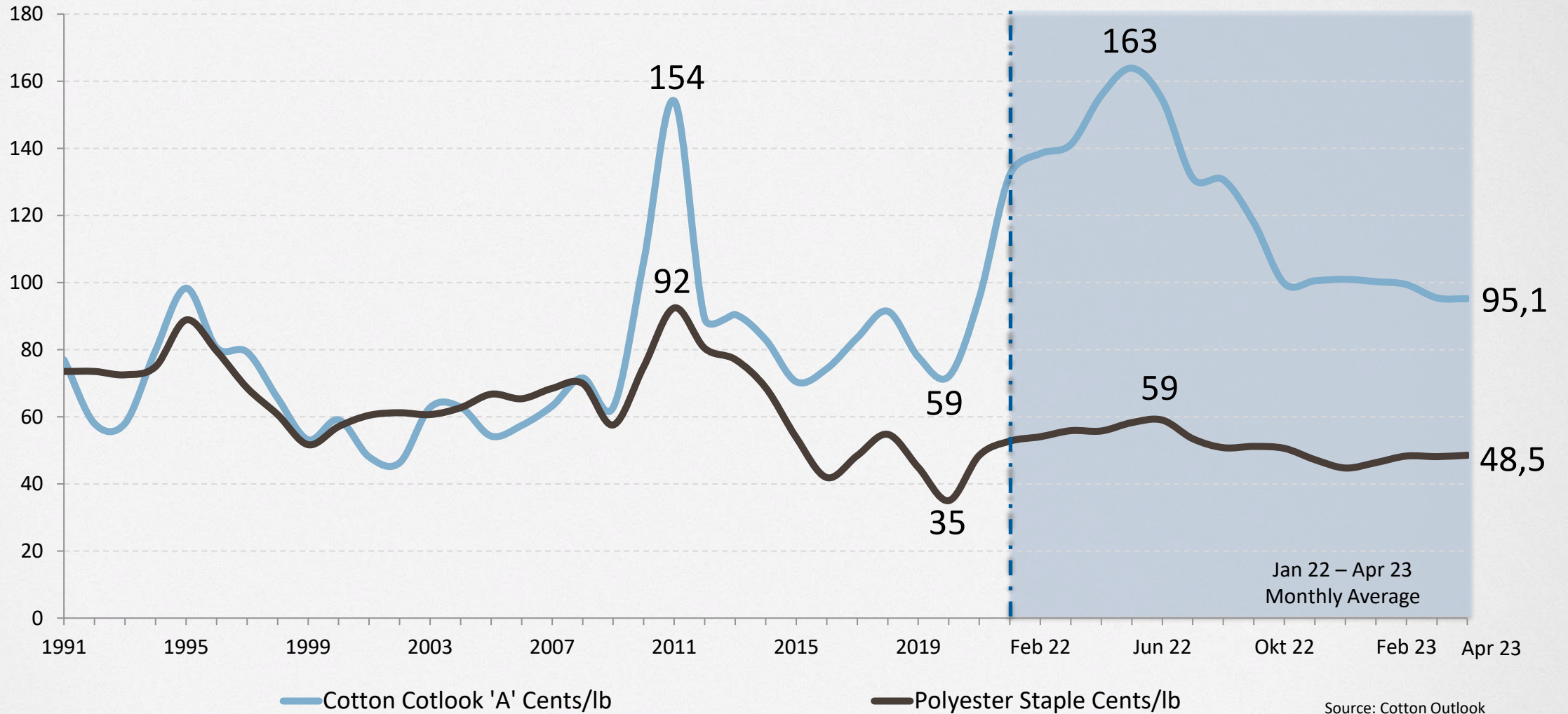
# CLIMATIC CONDITIONS



# COTTON PRICES ICE



# PRICE DEVELOPMENT COTTON AND POLYESTER LONG TERM (YEAR AVERAGE)





## SOCIAL AND ENVIRONMENTAL ASPECTS OF COTTON

Africa, China, India and Pakistan: livelihood for 21,3 million farmers

World wide from field to bale 150 million people

Cotton ist ready made by nature and can be recycled biologically

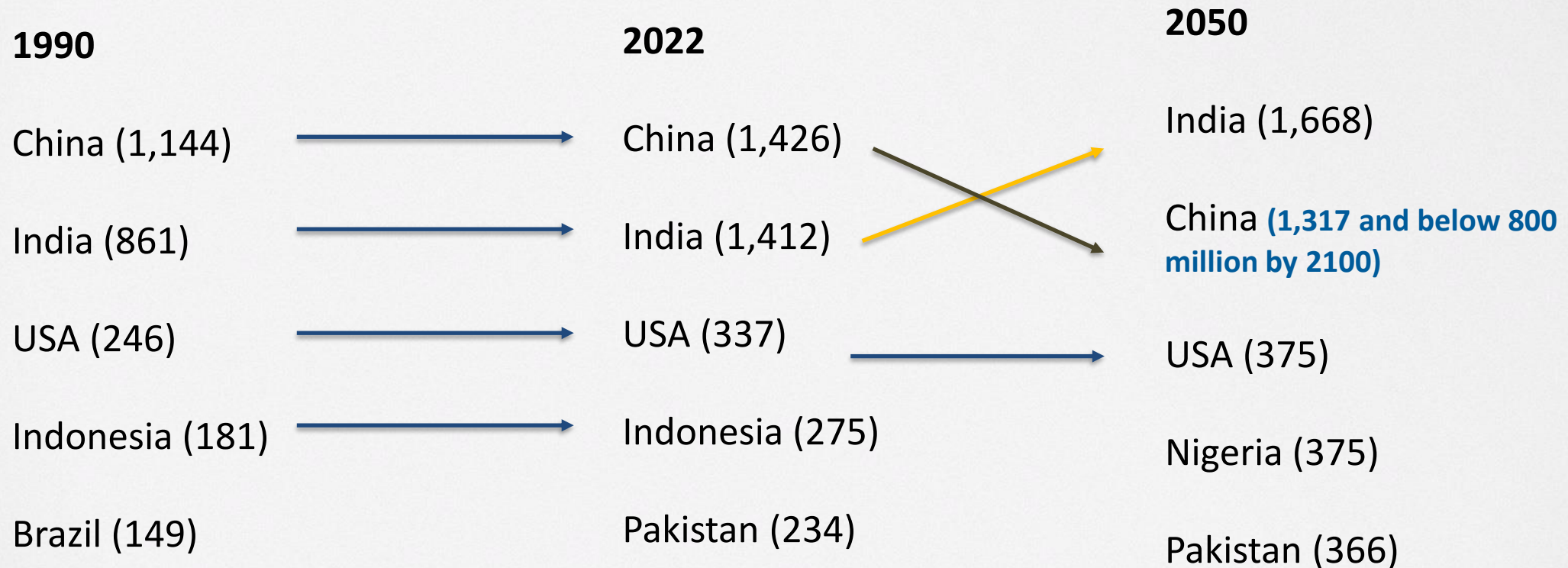
# WORLD POPULATION

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- In **2020**, growth rate of the global population fell under 1 per cent per year for the first time since 1950.
- The latest projections by the United Nations: Growth to around 8.5 billion in 2030 and 9.7 billion in **2050**
- Peak of around 10.4 billion people during the 2080s and to remain at that level until **2100**.
- India projected to surpass China as the world's most populous country in **2023**.
- **China .....**

# THE WORLD TEN MOST POPULOUS COUNTRIES

1990, 2022 and medium scenario 2050 number in parentheses refer to total population in millions



## FIBER CHALLENGE - CIRCULAR ECONOMY

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- More and more fiber blends
- Of 100% used clothing collection, 45% is recycled (in Germany)
  - of which 30% downcycled and 10% thermal recycling
- 1-5% real fiber recycling
- Recycling has its limits
- Endless circular economy currently only with correspondingly high input. Does this make sense?

Each fiber must work out its solution for the future

# FIBER CHALLENGE

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- EU directive on sustainability reporting by companies was adopted in January 2023
- Proposal of the European Commission for a Directive on Corporate Sustainability Due Diligence, CSDD), February 2022
- EU Sustainable and Circular Textiles Strategy, March 2022
- EU Eco-label Regulation (EC) No 66/2010
- Ecodesign Directive (Ecodesign and Digital Product Passport)
- REACH Regulation (EC No 1907 /2006)
- EU POPs Regulation (EU 2019/1021)
- Biocides Regulation (EU 528/2012), since 2012
- European Textile Labelling Regulation (EU 1007 /2011)
- EU Waste Framework Directive (2008/98/EC)
- Closed Substance Cycle Waste Management Act and Duty of Care for Goods
- Directive on single-use plastics (EU 2019/904)
- EU Product Safety Regulation (GPSR), 2024
- Green Claims - EU Draft Directive, March 2022





THANK YOU