



Envisioning Success

The National Cotton Council-supported Vision 21 project is aimed at helping the U.S. cotton industry better navigate the ever-changing world marketplace

Where is the project's focus ?

■ “The Vision of the U.S. Cotton Industry in the 21st Century” is a Cotton Foundation project begun in 2008 with primary financial support from Monsanto and additional funding from John Deere. The NCC, Cotton Council International (CCI) and Cotton Incorporated managed the project's three study areas: 1) logistical issues affecting U.S. raw cotton flow from the gin bale press through warehousing to the mill; 2) environmental aspects of U.S. cotton from field to fiber; and 3) an in-depth assessment of Asian consumer apparel and textile product markets. The studies' findings were reported to industry stakeholders, who discussed them and provided input for these organizations' future work plans.

What is the status?

■ The NCC Directors recently adopted seven policy statements from the logistics study's recommendations and reactivated the NCC's Performance and Standards and Quality task forces to address those policies. The policies emanated from the study's identification of cotton flow strategies, systems and practices that the U.S. cotton industry may employ to lower costs or improve returns while meeting the demands of moving cotton into export markets and simultaneously servicing the domestic market.

directing cotton sustainability research. Specifically, a knit golf shirt and woven trousers were assessed from the field through to consumer care, use and disposal. One key finding, for example, was that laundering was a dominant environmental impact followed by textile manufacturing and agricultural production, with much of that traced to nitrogen use. The study's results already have helped shape strategic initiatives for the U.S. cotton industry including: 1) expanding research in water and nitrogen-use efficiencies; 2) developing a more accurate model of agricultural toxicity impacts, including the incorporation of textile chemical profiles; 3) continuing support of wastewater reduction research in textile manufacturing; and 4) educating consumers on sustainable garment care. The results also will be helpful as the NCC and Cotton Incorporated – as part of the non-Vision 21 “Field to Market Alliance” – join with other commodity groups in communicating positives regarding food/fiber production sustainability.

The third study involved an assessment of the fastest growing consumer market for cotton textiles and apparel in the next 20 years. Factors that will influence production capacity, flow, promotion and trade policy were examined. Specifically, CCI, Cotton Incorporated and the NCC will continue to generate reliable data about consumption behaviors and trends within the rapidly-growing Chinese consumer market. A consumption model also will be developed utilizing CCI's end user fiber consumption research among upper-middle class consumers in India's major metropolitan areas. In addition, a study subcomponent – known as Cotton's Revolutions – is enabling CCI to engage the global cotton textile supply chain in discussion about the forces affecting the world's textile and apparel complex through the year 2025.



Vision 21 has helped U.S. cotton shape initiatives such as educating consumers on sustainable garment care.

From Vision 21's second study, current and accurate benchmarks were established for cotton fiber/fabric production's environmental impact – with the overall goal of

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