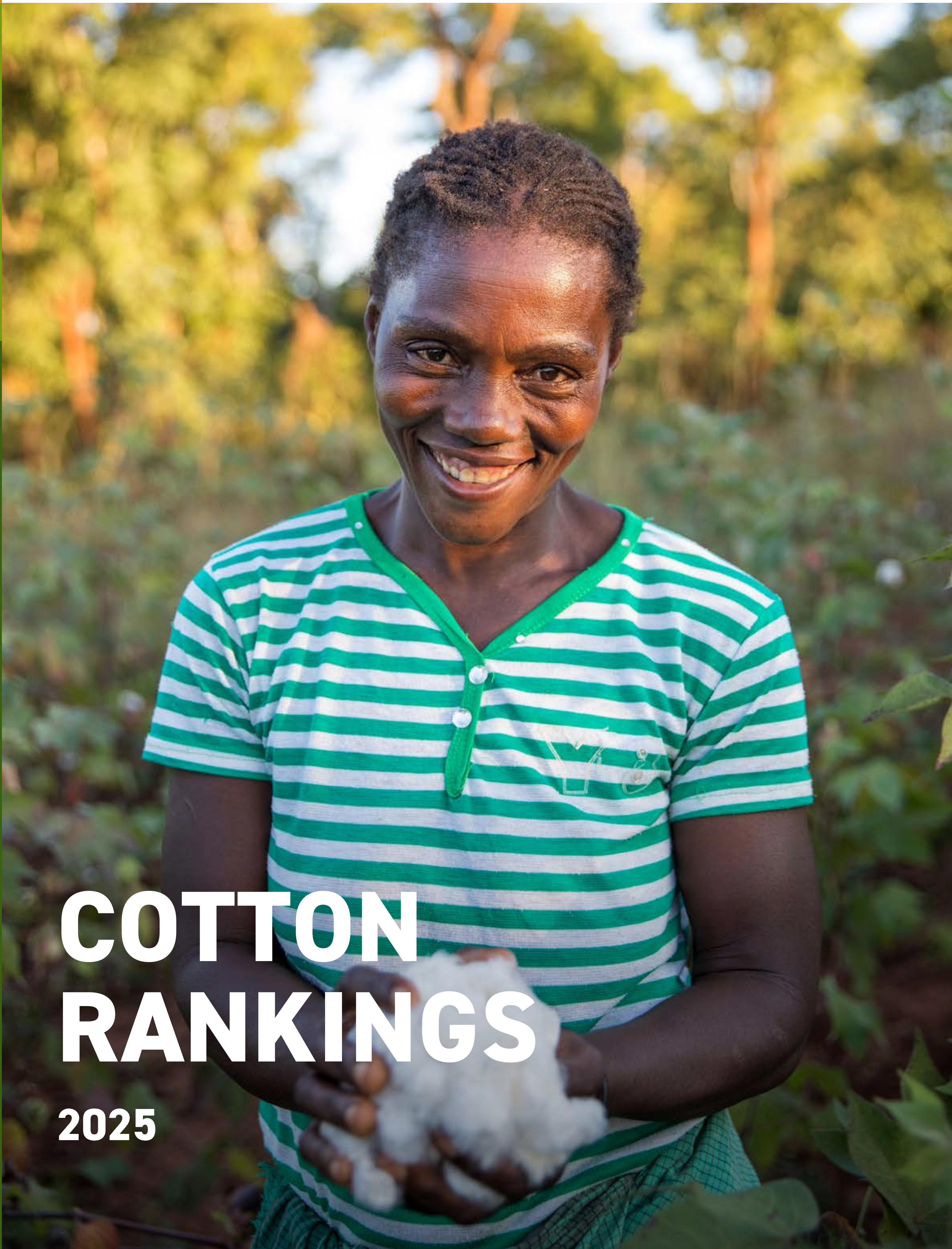
Solidaridad

good on you



COTTON RANKINGS

2025

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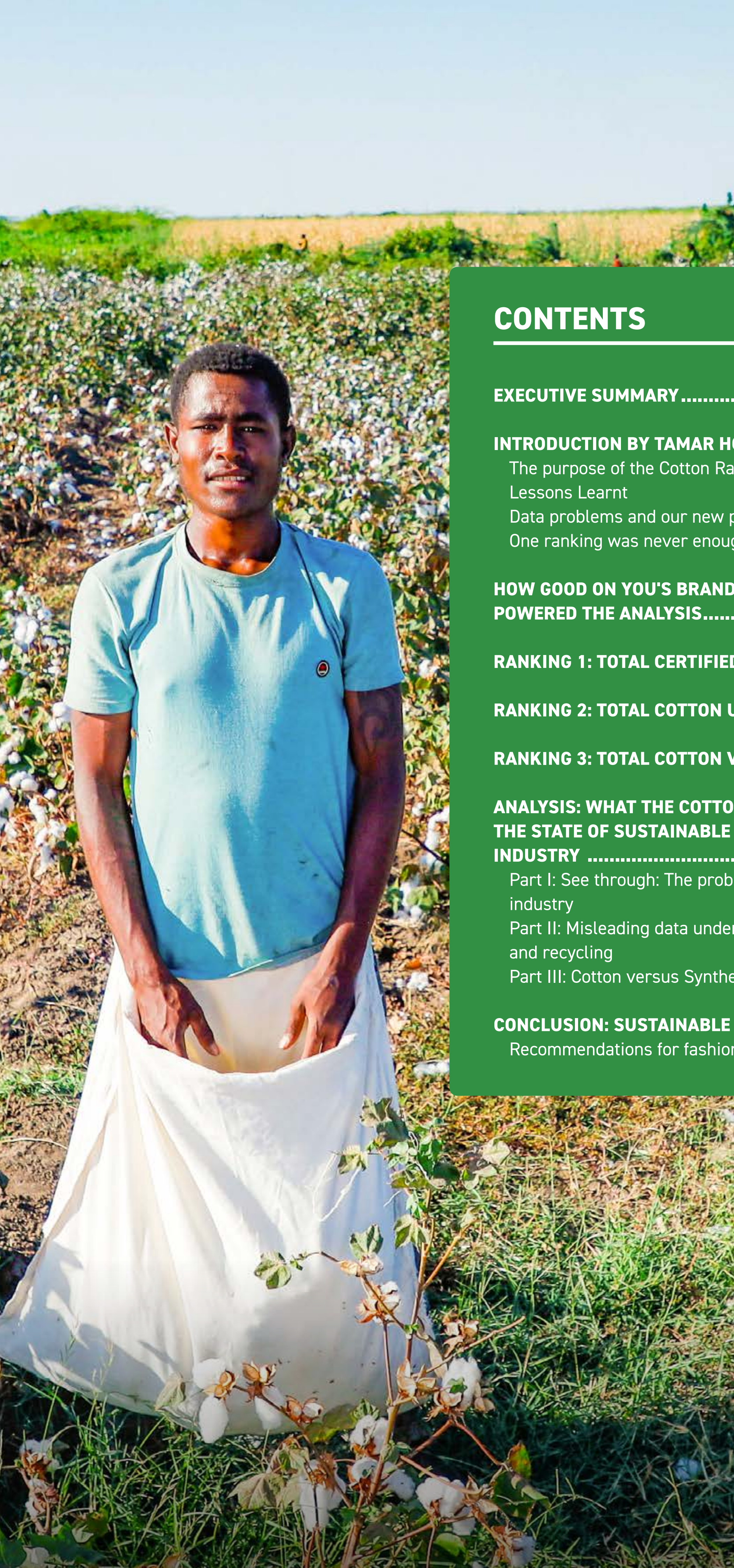
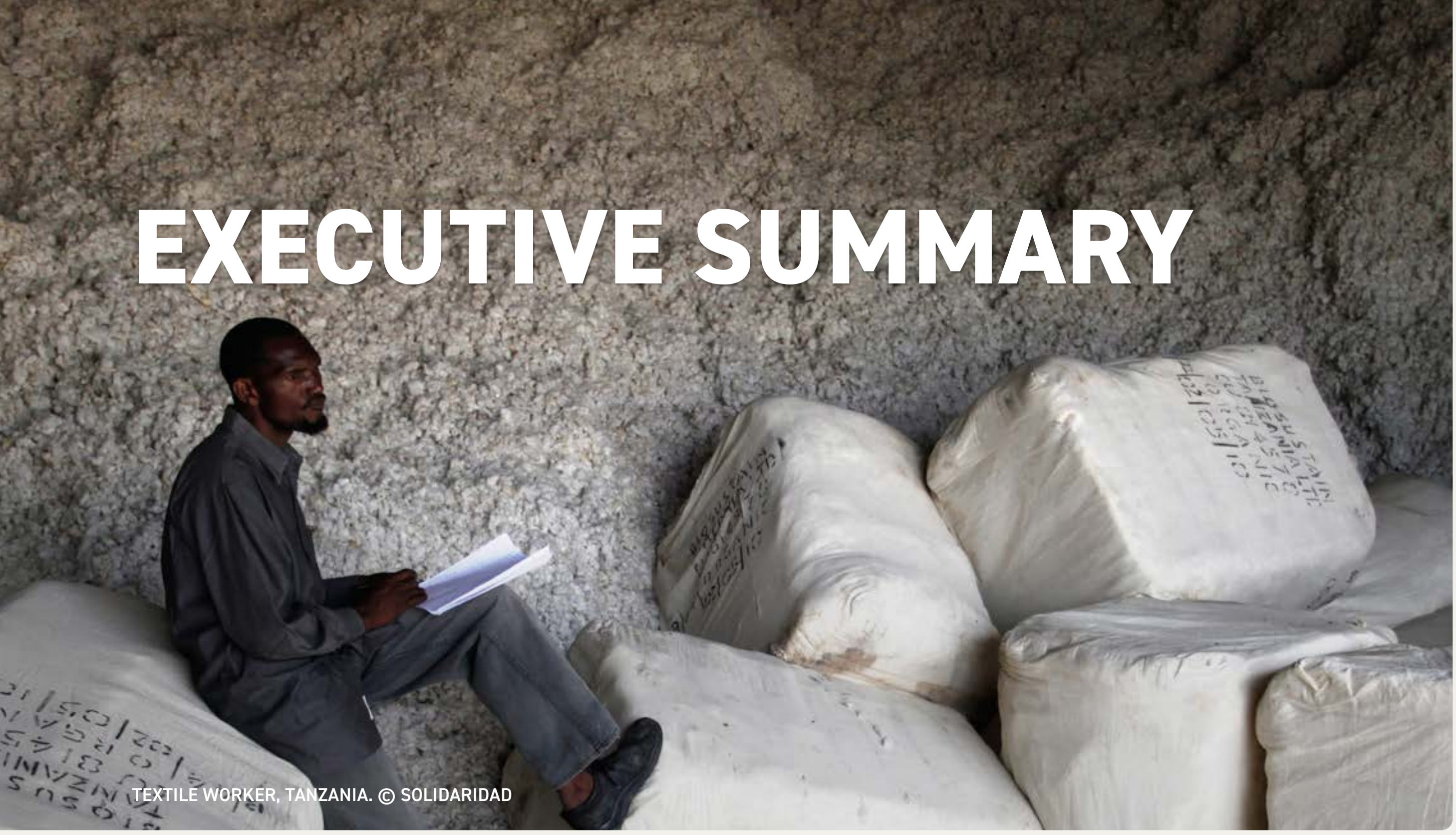


CONTENTS

EXECUTIVE SUMMARY


TEXTILE WORKER, TANZANIA. © SOLIDARIDAD

This year, with the support of Good On You, Solidaridad's Cotton Ranking has become Solidaridad's Cotton Rankings, featuring three rankings designed to give readers a much greater understanding of the complex reality of sustainable cotton in the fashion industry.

Our first ranking tracks the amount of Certified Cotton in each major brand's material mix, showcasing the leaders and laggards in Certified Cotton.

Our second ranking looks at the Total Cotton purchased by the major brands and Groups, providing us insight into which companies, whether they buy sustainable or not, dominate cotton purchasing, and have the most potential to impact the supply chain as a whole.

Finally in our third ranking, we look at Cotton vs Synthetics, comparing how each brand balances its use of farm grown cotton with fossil based fibres. This provides new insights into the rising dependence of brands on inherently unsustainable synthetic materials.

The rankings reveal some of the issues impacting sustainability in cotton supply chains, old and new:

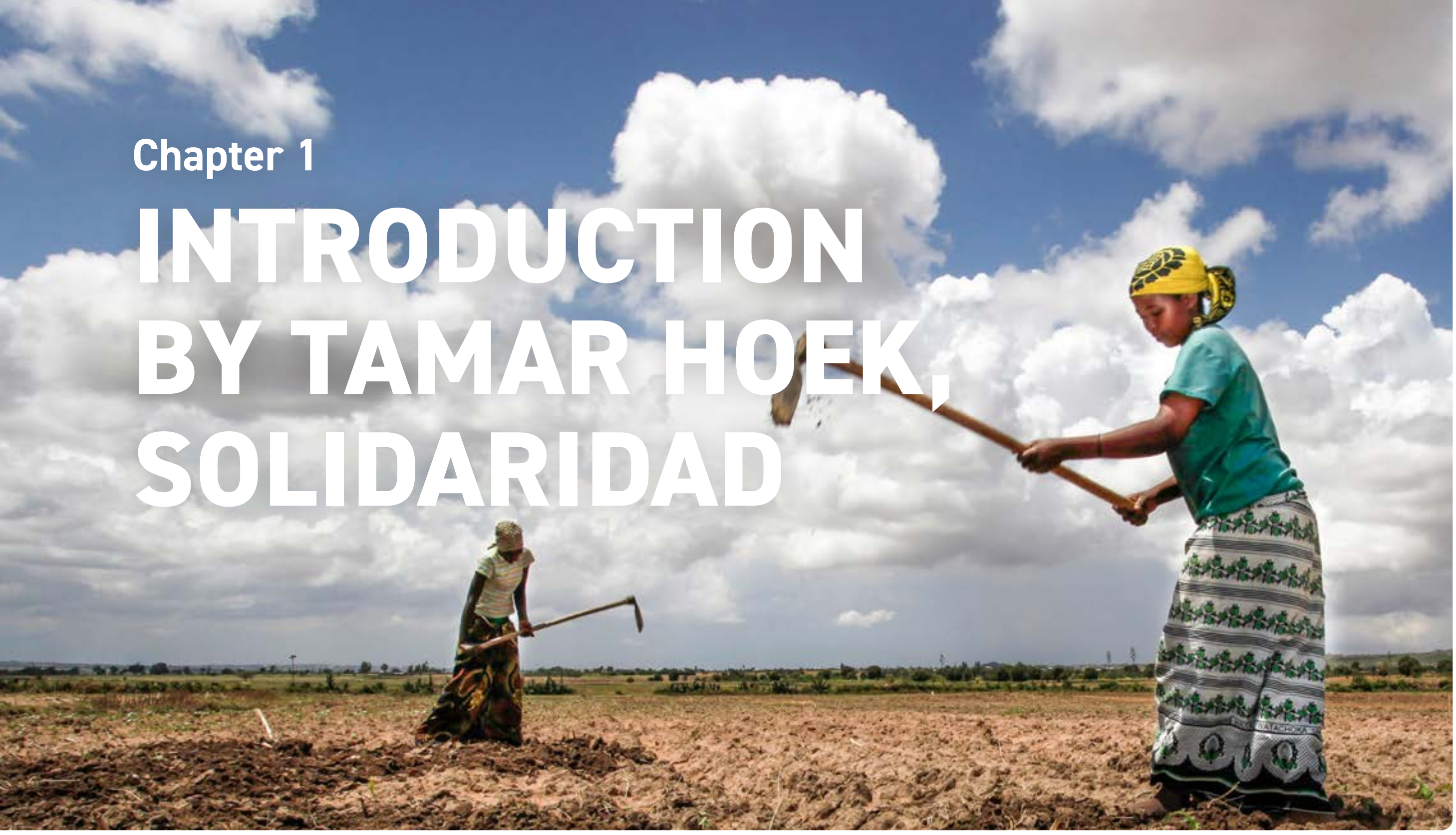
Data problems: Transparency remains a key issue. For example just 35 out of 100 companies provide detailed information on the breakdowns of their cotton certifications, meaning there is information about what type of standard or certification body they use. This lack of clarity from the majority of companies makes a truly comprehensive analysis impossible.

Limited progress: We have seen limited progress on sustainability in the sector since our last ranking in 2023. Just 31 of the companies ranked use 50% cotton or more in their operations and of these just 17 of them claim that more than 50% of their cotton is certified.

Large players can make a big difference: While smaller brands lead the way in terms of the percentage of sustainable cotton in their materials mix, it is larger brands that offer the greatest opportunity for system change in cotton.

Increasing reliance on synthetic fibres: While cotton remains the larger part of the supply chain for slightly more than half of the brands analyzed, synthetic fibres make up a considerable share. Just 31 brands use more than 50% cotton, while 26 brands use more than 50% synthetic fibres, with the remaining 44 brands using a wider mix of different fibres, natural and synthetic. Unfortunately many of the companies most reliant on synthetics are major industry players, meaning the importance of synthetics in the fashion industry is greater than it appears on the face of it.

Unlocking the potential of sustainable cotton: Bad data and poor purchasing practices are slowing down the move towards sustainable cotton in the fashion industry, while the potential for sustainable cotton is being undermined by major brands' rising dependence on synthetic fibres. Change is possible, but brands need to act now: invest in proper data management and transparency, choose natural solutions over synthetic, and support farming communities at the heart of the cotton supply chain.



Chapter 1

INTRODUCTION BY TAMAR HOEK, SOLIDARIDAD

The purpose of the Cotton Ranking

The purpose of the Cotton Ranking, since it was first launched nearly a decade ago, has always been this:

to accelerate change in the industry and to inform the decisions of brands and retailers, policymakers and other industry stakeholders.

The report sought to elaborate on the deep issues underpinning an unsustainable cotton supply chain. We aspired to pull at the threads that linked smallholder cotton farmers with major brands, and worked to peel away the layers of intransparency laid down by the industry.

Lessons Learnt

One lesson we learnt already back in 2016 was that, despite our best efforts, a consolidated and clear 'ranking' that balances all factors, was always going to be an uphill battle. There is no universally-accepted definition of 'sustainable' cotton in the first place, which is why we have stuck with 'certified' as our best hope of having one clear category. But, yes, balancing all of this was nearly impossible.

Not that we haven't tried. In the past we weighted our categories, balancing total cotton against total certified, and modified the results based on factors such as whether companies had been transparent or not, among others. The result of this careful balancing

TAMAR HOEK (SOLIDARIDAD EUROPE)

act has provided a ranking that offers a good glimpse at the realities of the cotton industry, but one that risks oversimplifying what is, at its core, one of the most complicated supply chains in the world.

Occasionally this would even allow companies to hide behind the numbers that benefit them most, such as certification, while ignoring the data that paints a more complex picture: total cotton, or the role of synthetics in their supply chain.

This last point is particularly salient from Solidaridad's point of view. We work to ensure that smallholder farmers in the cotton supply chain, who produce at least 70% of the world's cotton, can do so in balance with nature. Our work in more recent Cotton Papers [Cotton and Climate, Cotton and Labour, Cotton and Biodiversity], showcase that cotton can provide smallholders a living income, good work, and the opportunity to become a net positive force in the world, but only with the support of the industry and civil society. When smallholders have access to training, funds and support, they can transform their farms in a way that supports global biodiversity and builds community resilience to climate change. However, if short-term financial and reporting goals encourage brands to expand their use of synthetics, even recycled synthetics, then sustainable cotton's potential will be smothered in its cot.

Data problems and our new partnership

The other issue, which I am sure many people working on this topic can sympathize with, has been a lack of reliable, usable data. Whether its complex reporting criteria, insufficient data management or outright intransparency, many of the brands that depend on the cotton supply chain have failed to disclose critical information that could provide insight into important questions, such as: How much of the cotton purchased meets certification standards? Where does it come from? What is the role of cotton in their total material mix? Many do not even disclose the total amount of cotton that they purchase. Even companies that claim to use certified cotton will avoid mentioning the certifications they use, and we know that not all certifications are made equal.

As you can imagine, for an organization trying to understand the problems of the cotton industry, and work with stakeholders to find solutions, this has been a major roadblock.

Thankfully this year we are delighted to have the support of Good On You, the leading sustainability platform rating fashion brands, giving consumers, businesses and the press insights into how the industry performs. Using only publicly available data to promote transparency, Good On You assesses brands based on their policies and actions to address critical issues across the three pillars of people, the planet, and animals.Their team has provided the data that underpins this year's publication, and have offered fantastic insights into the data itself that goes beyond just helping us find the right numbers, but showing what these numbers mean.

One ranking was never enough

As for the other problem: balancing the data to create a single unified ranking? We finally learnt the lesson that 2016 tried to teach us: one ranking cannot express the complexity of the cotton supply chain. And it doesn't need to. This year, making great use of the invaluable data collected by Good On You, Solidaridad is launching three Cotton Rankings. And for the first time we will take a critical look at the role of synthetics in supply chains.

Below, or via our interactive rankings on https://sustainablecottonhub.org/cotton-rankings, you can explore how cotton companies stack up along three different axes: Total cotton purchased; the proportion of certified cotton to total cotton purchased; and total cotton vs. total synthetics used in each brand's supply chain. By teasing these strands apart, we hope to show how even a score as clear cut as 'what percentage of your cotton is certified' can be undermined by questions like 'what percentage of your supply chain is made up of synthetic materials?' or 'how much cotton do you actually buy?'

In essence, each ranking can flip the other on its head. This marks a major break from our previous rankings where different brands could stand atop the data to position themselves as a 'sustainable' frontrunner.

Additionally, this year we are being more critical of how certification weighs into a company's rank. Only certifications that meet some minimum standards are being counted in favour of a brand's total certified cotton[1]. This means that certain brands who performed exceptionally well in this category in previous rankings may appear noticeably worse.

All in all, the 2025 rankings represent a more comprehensive look at how fashion brands contribute to or resist sustainable cotton practices. Please don't take my word for it: the rankings are available for you to explore. Apart from these three axes, you can filter them to check if companies pass the transparency test or you can do a deeper dive into each brand assessed, and explore how we collected data for them and learn how they handle traceability. Doing this will allow you to draw your own conclusions.

1 Cotton certifications considered included BCI, CmiA, GOTS, OCS, Fairtrade, US CTP, REEL, MyBMP, ABR, Cotton Leads. For certified recycled cotton, we considered RCS and GRS.

How Good On You's brand rating methodology powered the analysis

A note from Sandra Capponi, Co-Founder good on you

At Good On You, we've spent the past decade building the world's largest sustainability rating platform for fashion, beauty, and retail. We've assessed well over 6,000 brands across their entire supply chains, considering the most material issues and indicators of impact. And we've followed Solidaridad's Cotton Rankings since their inception. So when the opportunity arose to contribute our data to this year's analysis, the collaboration made perfect sense.

Broadly speaking, our methodology is comprehensive and led by sustainability experts. We evaluate brands across three pillars (people, planet, and animals) examining around 100 key issues from worker wages to water use to material sourcing. Our analysts use proprietary technology to aggregate and verify published data from the most credible sources, including certification schemes, standards, independent assessments and brands' own reporting.

Transparency is at the core of our approach because we believe the public has a right to know how brands impact the critical issues facing our planet. But that's not always so easy. Transparency isn't simple for an industry with complex supply chains, but it's necessary for brands to improve, suppliers to adapt, and consumers to make informed choices. For this cotton analysis, the critical piece was how we handle data gaps, and there are many because brands rarely disclose full material breakdowns or sourcing details. We designed our methodology with that problem in mind. So when brands fail to provide transparency, as they often do, our analysts will then conduct detailed SKU-level analysis, systematically reviewing actual product offerings to understand material composition. We'll analyse thousands of products, accounting for parent company data where relevant, to build a complete picture of what brands are actually selling.
A close look at certifications was particularly revealing. Vague claims don't stack up; even "certified cotton" means nothing without specifics. We require brands to publicly name their certifications (whether Better Cotton, GOTS, or others) for inclusion in our assessment. As this report shows, only 35 of 100 brands provide this basic information accompanied with a detailed breakdown.

What makes this partnership powerful is how Good On You's sustainability assessments, including deep analysis of material sourcing and certification claims, complement Solidaridad's focused cotton expertise. Our data reveals patterns invisible in traditional reporting: for instance, how brands with the highest percentage of certified cotton often use the least cotton overall, or how synthetic reliance concentrates among the industry's largest players. We track not just what brands say, but what their product mix tells us about sourcing priorities.
This isn't about naming and shaming. The goal here is transparency and accountability. We're setting a high bar because the industry needs it, celebrating brands that demonstrate best practice whilst supporting others to get there. When 71 brands fail to disclose basic cotton volumes, we see an industry avoiding scrutiny. By bringing our ratings data to Solidaridad's cotton analysis, we're helping brands, suppliers, and consumers ask better questions and demand better answers.

Learn more about how Good On You rates brands here.

NOTE ON DATA: The data was collected between March and June 2025. Any updates made since then have not been integrated. We invite brands to contact us directly with any updates they would like to signal on the Sustainable Cotton Hub. You can reach Tamar Hoek at tamar.hoek@solidaridadnetwork.org

Better Cotton or Equivalent
Organic
Recycled
Other

FIGURE 1 - TOTAL CERTIFIED COTTON

	BRAND NAME	CERTIFIED COTTON BREAKDOWN
100%	Adidas	
100%	Amazon *	
100%	H&M (H&M Group)	
100%	Jack Wolfskin	
100%	C&A	
100%	COS (H&M Group) *	
100%	Tom Tailor	
100%	Hugo Boss	Unknown
100%	HEMA	Unknown
100%	Ikea	Unknown
99%	Puma	
99%	Zalando	
99%	G-Star RAW	
98%	Banana Republic (GAP) *	
98%	Gap (GAP) *	
98%	Old Navy (GAP) *	
97%	Marc O'Polo	
96%	Levi's	
94%	Mango *	
94%	Walmart	Unknown
93%	s.Oliver	Unknown
93%	Marks & Spencer *	
90%	Lindex *	
90%	Tchibo *	
90%	Bonprix *	
90%	Otto *	
89%	Mammut	
89%	Patagonia	
86%	OVS	
82%	Balenciaga (Kering Group)	Unknown
82%	Alexander McQueen (Kering Group)	Unknown
82%	Bottega Veneta (Kering Group)	Unknown
82%	Gucci (Kering Group)	Unknown
76%	Converse (Nike Group)	
76%	Nike (Nike Group)	
76%	Marc Jacobs	Unknown
73%	Next	
70%	The North Face (VF)	
70%	Timberland (VF)	
70%	Vans (VF)	
69%	Bershka (Inditex Group)	
69%	Massimo Dutti (Inditex Group)	
69%	Pull&Bear (Inditex Group)	
69%	Stradivarius (Inditex Group)	
69%	Zara (Inditex Group)	
62%	Cortefiel	
61%	J. Crew	
55%	Carter's	
54%	American Eagle	
54%	New Look *	

	BRAND NAME	CERTIFIED COTTON BREAKDOWN
54%	Kiabi	
51%	United Colors of Benetton *	
50%	MUJI *	
50%	REI *	
50%	River Island *	
42%	Aritzia	
36%	Gildan *	
35%	Decathlon	
30%	The Children's Place *	
28%	Cotton On	
27%	Diesel (OTB Group)	
27%	Marni (OTB Group)	
16%	Victoria's Secret	
10%	boohoo	
10%	Jack & Jones *	
10%	Tezenis *	
10%	Vero Moda *	
2%	Target *	
1%	Woolworths South Africa *	
1%	Calzedonia *	
0%	ASICS	Unknown
0%	Metersbonwe	Unknown
0%	Calvin Klein (PVH Corp)	Unknown
0%	Tommy Hilfiger (PVH Corp)	Unknown
0%	Under Armour	Unknown
0%	ASOS	Unknown
0%	Brooks Sport	Unknown
0%	Columbia	Unknown
0%	Disney	Unknown
0%	Express	Unknown
0%	Forever 21	Unknown
0%	Fruit of the Loom	Unknown
0%	Giorgio Armani	Unknown
0%	Hanes	Unknown
0%	Intimissimi	Unknown
0%	Jordan	Unknown
0%	lululemon	Unknown
0%	Max Mara	Unknown
0%	Primark	Unknown
0%	Ralph Lauren	Unknown
0%	Reebok	Unknown
0%	Russell Athletic	Unknown
0%	SHEIN	Unknown
0%	Speedo	Unknown
0%	Van Heusen	Unknown
0%	Youngor	Unknown
0%	Champion	Unknown
0%	Foot Locker	Unknown
0%	Uniqlo	Unknown
0%	DKNY	Unknown

* No breakdown available. Certified Cotton Sources estimated using public data.
** In some instances, parent company/group level data has been utilised to inform some or all of a brand's ranking.

FIGURE 2 - TOTAL COTTON USED (TONS)

	BRAND NAME	TOTAL COTTON USED (TONS)
1	Inditex Group (Bershka, Massimo Dutti, Pull&Bear, Stradivarius, Zara) *	298582,2
2	Gildan *	239358
3	Nike Group (Nike, Converse) *	116913
4	PVH Corp (Calvin Klein, Tommy Hilfiger)	69239
5	Adidas	54883
6	C&A *	43521
7	Puma	36900
8	Kiabi *	30114,5
9	Carter's *	26891
10	OVS *	21140
11	Mango *	20042
12	Cortefiel	19525
13	Decathlon *	19426
14	J. Crew *	15472
15	United Colors of Benetton	14161
16	Hugo Boss *	13761
17	Under Armour	13377
18	Aritzia *	5857
19	Lindex Group *	4511,2
20	OTB Group (Diesel, Marni)	4107,2
21	Marc O'Polo *	3764
22	Zalando	2788

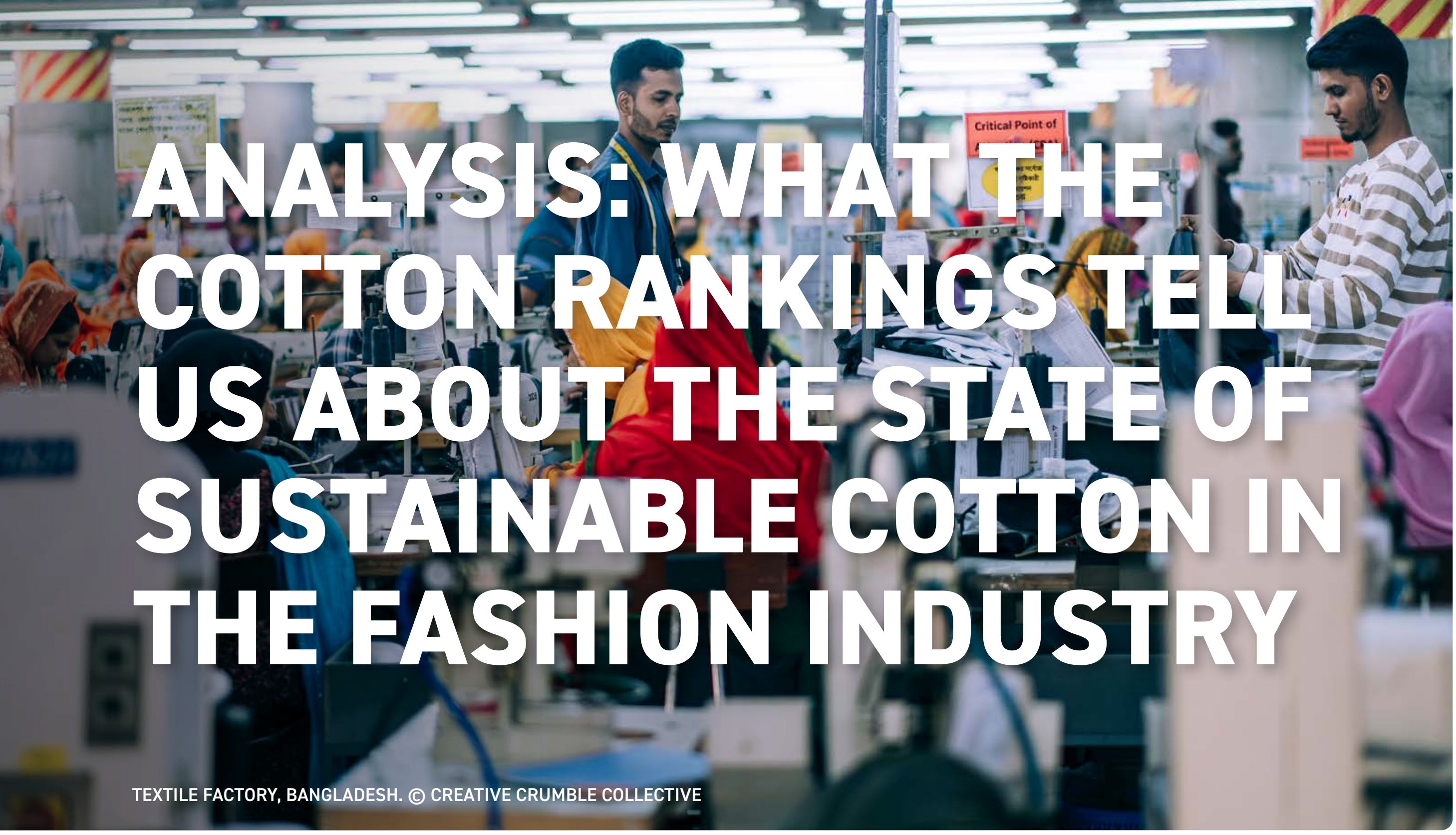
* Only brands/groups where a total cotton figure could be found or estimated are included on this ranking of total cotton. For clarity we have grouped brands under their parent company where applicable.

FIGURE 3 - TOTAL COTTON VS. TOTAL SYNTHETICS

Total Cotton
Total Synthetics
Other Materials

	BRAND NAME	BREAKDOWN
1	Levi's	
2	G-Star RAW	
3	Ralph Lauren	
4	Carter's	
5	Marc O'Polo	
6	J. Crew	
7	OVS	
8	United Colors of Benetton	
9	Diesel (OTB Group)	
10	Marni (OTB Group)	
11	Calvin Klein (PVH Corp)	
12	Tommy Hilfiger (PVH Corp)	
13	C&A	
14	Kiabi	
15	Hugo Boss	
16	Next	
17	H&M (H&M Group) *	
18	Walmart *	
19	Marks & Spencer *	
20	Lindex *	
21	Cortefiel *	
22	American Eagle *	
23	River Island *	
24	Gildan *	
25	The Children's Place *	
26	Woolworths South Africa *	
27	Metersbonwe *	
28	Champion *	
29	Fruit of the Loom *	
30	Hanes *	
31	Russell Athletic *	
32	s.Oliver	
33	Mango *	
34	Aritzia	
35	Victoria's Secret	
36	New Look	
37	Amazon *	
38	COS (H&M Group) *	
39	Tom Tailor *	
40	Zalando *	
41	Bershka (Inditex Group) *	
42	Massimo Dutti (Inditex Group) *	
43	Pull&Bear (Inditex Group) *	
44	MUJI *	
45	Decathlon *	
46	boohoo	
47	DKNY *	
48	Intimissimi *	
49	Jack & Jones *	
50	Tezenis *	
51	Vero Moda *	
52	lululemon	
53	Patagonia *	
54	Adidas	
55	Jack Wolfskin *	
56	Puma	
57	Tchibo *	
58	Converse (Nike Group) *	
59	Nike (Nike Group) *	
60	Marc Jacobs *	
61	The North Face (VF) *	
62	Timberland (VF) *	
63	Vans (VF) *	
64	Stradivarius (Inditex Group) *	
65	REI *	
66	Calzedonia *	
67	Under Armour *	
68	HEMA *	
69	SHEIN	
70	Mammut *	
71	Balenciaga (Kering Group) *	
72	ASICS *	
73	Alexander McQueen (Kering Group) *	
74	Bottega Veneta (Kering Group) *	
75	Columbia *	
76	Gucci (Kering Group) *	
77	Bonprix	Unknown
78	Otto	Unknown
79	Zara (Inditex Group)	Unknown
80	Banana Republic	Unknown
81	Gap	Unknown
82	Cotton On	Unknown
83	Old Navy	Unknown
84	ASOS	Unknown
85	Brooks Sport	
86	Disney	Unknown
87	Express	Unknown
88	Foot Locker	Unknown
89	Forever 21	Unknown
90	Giorgio Armani	Unknown
91	Ikea	Unknown
92	Jordan	Unknown
93	Max Mara	Unknown
94	Primark	Unknown
95	Reebok	Unknown
96	Speedo *	
97	Target	Unknown
98	Uniqlo	Unknown
99	Van Heusen	Unknown
100	Youngor	Unknown

* No material breakdown available. Material breakdown estimated using public data.
** In some instances, parent company/group level data has been utilised to inform some or all of a brand's ranking.



ANALYSIS: WHAT THE COTTON RANKINGS TELL US ABOUT THE STATE OF SUSTAINABLE COTTON IN THE FASHION INDUSTRY

TEXTILE FACTORY, BANGLADESH. © CREATIVE CRUMBLE COLLECTIVE

Part I: See through: The problem with opacity in the cotton industry

A key finding of this research is that the cotton industry has remained broadly intransparent. Of the 100 brands included in these rankings, only 29 disclose the total amount of cotton in their supply chain. Of the brands that offer no information on total cotton in their supply chain, eight of them still claim to be using certified cotton to some degree, but the lack of clarity limits the value of this assertion.

Just 35 out of 100 companies provide information on certification, meaning they provide information about what type of standard or certification body they use. We can use publicly available data to make estimates for a further 25, but this is not ideal. This leaves us with no reliable information on the breakdown of certifications for 39 of the brands assessed. This lack of clarity from the majority of companies further muddies the water. Only 25 companies provide a clear breakdown of the materials used in their operations (including cotton, synthetics, other materials). This makes it challenging to ascertain the importance of cotton in each brand's operation.

Still, Good On You's methodology has enabled us to fill critical data gaps. Using their SKU-level analysis, Good On You creates estimates based on available information from each brand's public reporting and product offerings. These estimates fall into clear brackets (less than 10%, and 10%, 30%, 50%, or 90% or more) conservatively applied to avoid overstating sustainability claims. For fast fashion brands whose offerings change weekly, these snapshots reflect the product mix at the time of analysis.

This ensures the integrity of our ranking, but reminds us of the costs of opacity. By only relying on estimates and public data, researchers are unable to get a clear picture of sustainability in cotton, which in turn impedes any effort to advocate for data-based solutions in the cotton sector. This also creates roadblocks for consumers interested in buying sustainably-produced goods.

We assume that some brands hope to benefit from this opacity to avoid making costly changes to their operations. However, this lack of transparency and traceability will ultimately harm these brands as new regulations, like the CSDDD, the Green Claims Directive, and the CSRD, come into force.[2]

Beyond that, a lack of data may simply hinder business operations, preventing companies from making wise investments in their own supply chains. Only 25 brands claim clear traceability of their own materials (to varying degrees). This suggests that even basic supply chain visibility remains out of reach for the majority. Without traceability, any material claim—be it on

2 At time of writing, various efforts by the European Commission to water down these pieces of legislation are wending their way through the European Union's legislative system. Solidaridad works to promote the adoption of these necessary and fair due diligence laws.

recycled synthetics or certified cotton—is nearly impossible to verify.

For smallholder cotton farmers at the start of this supply chain, this opacity amounts to invisibility, hiding their struggles from public view. Without better data, sustainability interventions will often fail to reach those that could make the most of them.

Part II: Misleading data undermines progress on certification and recycling

We have seen limited progress on sustainability in the sector since our last ranking in 2023. Just 31 of the companies ranked use 50% cotton or more in their operations and of these just 17 of them claim that more than 50% of their cotton is certified.

The most positive finding we can report is that 25 brands have reported certified recycled cotton in their supplies, highlighting a small but notable trend toward circularity in cotton sourcing. However for many of these brands the amount of recycled cotton remains negligible. Fourteen brands (G-Star Raw, Diesel (OTB Group), Marni (OTB Group), Tom Tailor, United Colors of Benetton, Amazon, C&A, COS (H&M Group), Marc O'Polo, Marks & Spencer, Lindex, Tchibo, J. Crew, New Look) include 1-4% of recycled cotton in their operations. Another 10 brands (the Inditex Group, Zalando, Cotton On, Puma, H&M (H&M Group), MUJI) use between 10% and 18% recycled cotton, with Patagonia leading the pack with 27% recycled cotton.[3] Data can also be misleading.

For many companies who claim the highest percentage of certified cotton in their supply chain, cotton represents the lowest percentage of their material mix. For instance, Adidas claims to use 100% certified cotton, but cotton makes up just 12% of their estimated material mix, which is largely synthetic. Similarly, Puma claims that their cotton is 99% certified, but cotton makes up just 10% of their supply chain. Tchibo claims that 90% of their 10% cotton share is certified.

This is not meant to undermine the solid work being done by these companies to achieve such high levels of certification. Even if cotton makes up just a small percentage of a brand's total material mix, the purchase volumes have the potential for large impact. Most brands do not report their total volumes of cotton sourced, so we cannot make a definitive list of the largest cotton buyers.

But what we do know can be especially telling. For instance, given Adidas' size as an organization, that 12% of certified cotton likely puts them among the largest buyers of cotton for clothing in the world.

Another interesting insight from the material breakdowns gathered in our research shows the extent to which major cotton buyers largely rely on synthetic fibres. This demonstrates the potential positive impact these companies could have if they would increase the proportion of cotton used in their operations.

Unfortunately in terms of setting and meeting targets, the ranked companies fared less well. Only 18 companies in the ranking have set and met their targets as by 2025. Of the 100 brands ranked, 26 have not committed to any targets at all. Of those that do provide timebound targets, some 28 that set target dates of 2025 or earlier have yet to achieve them.

Part III: Cotton versus Synthetics

In this ranking we also turned our attention to the role of synthetics in fashion brand supply chains for the first time. Synthetics continue to gain prominence. While companies make big promises on their usage of recycled synthetics, the overall impact of this on the environment pales in comparison to the impact of incorporating a higher proportion of natural fibres. In the long-term, natural fibres, like cotton, offer the best hope for an environmentally neutral, or even positive, supply chain. As we found in our recent Cotton and Climate Paper (2023): Current cotton farming practices too often are ecologically damaging and contribute to climate change, but cotton has the advantage of coming from a natural plant unlike synthetic fibres. If the sector increases adoption of sustainable and regenerative practices[4] across the supply chain, cotton has the potential to

3 The Inditex group includes: Bershka, Massimo Dutti, Pull&Bear, Stradivarius, Zara

4 Globally about 32% of cotton produced falls under some sort of sustainable category. Better Cotton accounts for around 22% of world volume. If you would include Organic, Fairtrade, CmiA, and USCTP you end up at around 32%.

become carbon neutral, or even climate positive, while supporting the livelihoods of people around the world. What is certain is that fossil fibres, whether recycled or not, will never have that advantage.

This is not to suggest that, in its current state, cotton production is a positive force. Chronic issues, such as the overuse of agrochemicals, poor water management, and monocropping mean that cotton contributes to climate change and the loss of biodiversity (Cotton and Biodiversity Paper, 2025), degrading the soil and ecosystems that help capture carbon and support life. Smallholder farmers who already live in poverty, largely due low cotton prices, lack the resources to adopt sustainable practices and ensure reliable production.

Cheap plastic synthetics lack cotton's potential for contributing to a more sustainable fashion industry, or do anything to alleviate poverty. Farmers can be supported to adopt regenerative agricultural practices and adapt to climate change, but only if retailers and brands change their sourcing policies and relationship with cotton farmers, workers, and suppliers. Companies should invest money and resources in smallholder production, take an active role in their value chains, and collaborate with all stakeholders to change course.

Unfortunately, our research suggests that the role of synthetics may only grow in the coming years in an ongoing effort to cut prices further, depriving cotton farmers of the income and support they need to make positive changes.

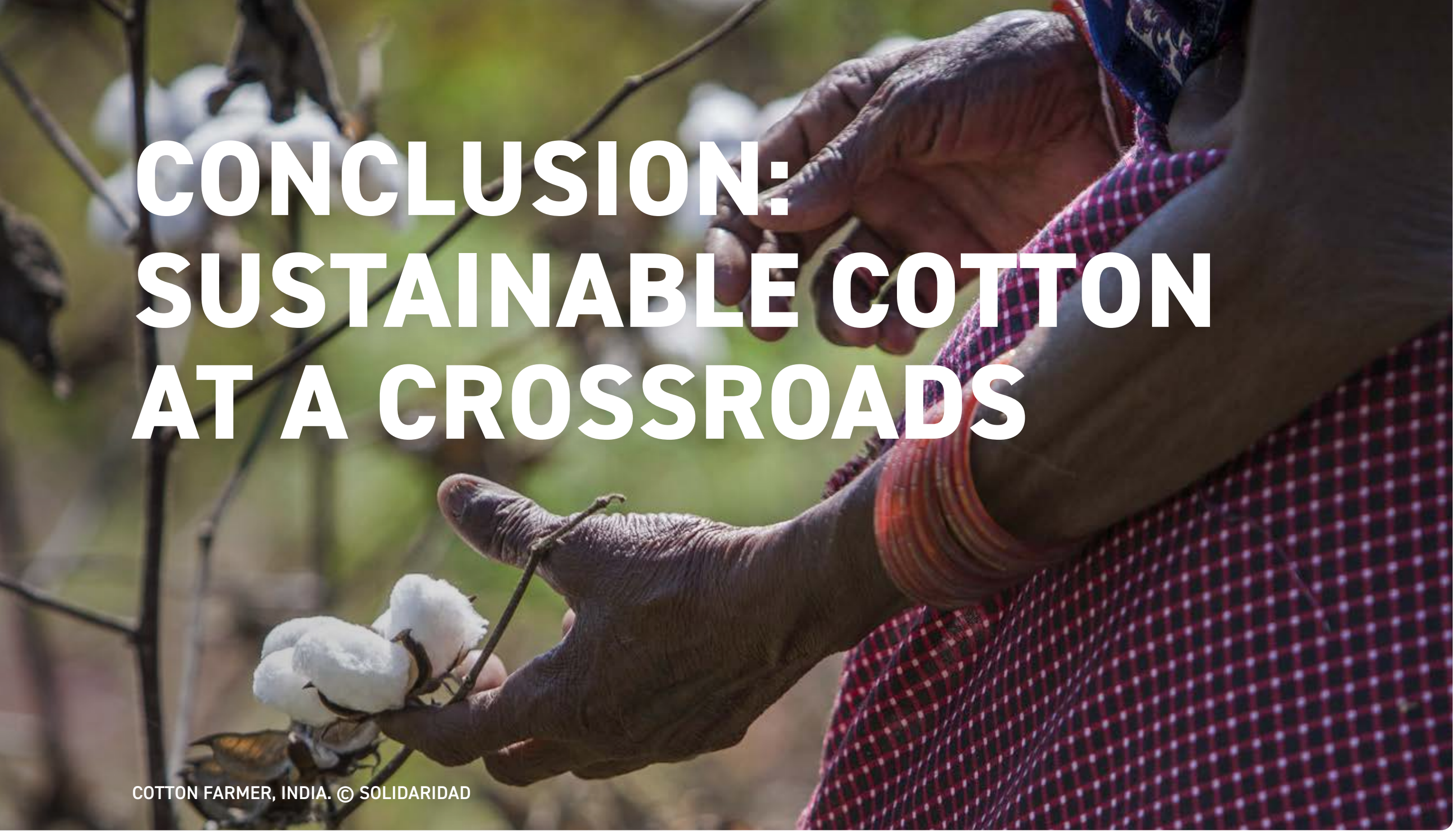
While cotton remains the larger part of the supply chain for slightly more than half of the brands analyzed, synthetic fibres make up a considerable share. 31 brands use more than 50% cotton, while 26 brands use more than 50% synthetic fibres, with the remaining 43 brands using a wider mix of different fibres, natural and synthetic. Unfortunately many of the companies most reliant on synthetics are major industry players, meaning the importance of synthetics in the fashion industry is greater than it appears on the face of it. Due to the specific qualities of synthetic fibres, sportswear and outdoor clothing manufacturers tend to utilize higher percentages of synthetic fibres: Speedo (90%), Columbia (90%), and Brooks Sport (99%).

Unfortunately many of the companies most reliant on synthetics are major industry players. Fast fashion giant Shein is now bigger than both H&M and Zara in terms of market share, and is heavily reliant on synthetic fibres, accounting for 82% of fibres used. And while 17 companies use more than 50% certified cotton, only 3 use more than 80% in their operations: Ralph Lauren (80%), Levi's (89%), and G-Star RAW (83%).

At a glance, the data looks positive. More brands are turning to cotton as their primary material, over synthetics. However this is somewhat misleading. While more brands rely on cotton, the use of synthetic fibres is concentrated in a number of very large brands who play an outsized role in the fashion industry. And with synthetic reliant disruptors, such as Shein, growing at the expense of their competitors, we can surmise that the role of synthetics will grow with them.

Going a layer deeper, the problem becomes even more apparent in the case of recycled synthetic fibres, which has fueled many public promises that regularly fall short. Just 5 brands report more than 25% of their material mix is recycled polyester; revealing that recycled synthetics play a marginal role in the fashion industry.

CONCLUSION: SUSTAINABLE COTTON AT A CROSSROADS



COTTON FARMER, INDIA. © SOLIDARIDAD

The 2025 Cotton Rankings provide readers with more detailed information than previous editions. This gives users the ability to rank the top 100 fashion brands based on various criteria, including their contribution to sustainable cotton, share of the global cotton market, or the role synthetic fibres play in their operations, among others. Readers can take this even further with the metadata provided to explore the certifications used, commitments to organic cotton, the overall use of natural fibres, or even use of recycled materials.

While this information is useful, the problem remains that the fashion industry as a whole is making insufficient progress towards sustainable cotton, and sustainable production in general.

Perhaps this picture would look different if we had more data. Transparency around the use of cotton in fashion remains poor. We urge brands to be more ambitious when it comes to transparency and data on cotton sourcing with a goal of full disclosure on the amounts and origin of their cotton, and how it was grown (certified, recycled, etc). Only with this data can a more complete, and more useful picture of the cotton sector be drawn.

For now we must conclude that this is wishful thinking. Thanks to the data analysis from Good On You, we can conclude that there is only very slow progress being made on sustainable cotton. The level of certification across the top 100 has seen only modest gains. Even that progress is greatly undermined by the fact that while total certified cotton use has increased, total cotton use is going down in comparison with synthetics.

The growing importance of synthetics in the fashion industry represents a threat to the environment and cotton's potential as a sustainable option. We urge companies to look for ways to increase their cotton use. Even popular outdoor clothing and sportswear brands, who are particularly reliant on synthetic fibres, should explore opportunities to reduce their dependence on virgin synthetics.

Broadly the sector has not embraced the myriad opportunities that exist for developing a more sustainable cotton supply. Investment in organic cotton remains rare, and climate positive cotton projects are few and far between.

Cotton is at a crossroads. While it remains a very important component of global fashion and clothing, the rise of synthetics, driven by fast fashion, undermines its role. This does not just mean that there could be less cotton in use. And it certainly does not mean that the problems associated with cotton production would be reduced in turn. All synthetic alternatives to cotton bring their own compounding problems.

What is at risk is the potential for a more sustainable fashion industry, for the world and for the people who make it possible. Cotton produced in balance with nature and by well-paid, well-protected farmers represents a brighter future for fashion. It is up to brands, today, to make this possible.

Recommendations for fashion brands

Customers care about sustainability, and they're counting on brands to change their behaviour today – not in five years' time. When it comes to the cotton value chain, brands have the greatest share of resources and influence, and driving positive impact requires their participation.

- **Invest in supply chain resilience and farmer livelihoods:** Companies should actively invest money and resources directly into smallholder cotton production, fostering strong relationships with farmers and workers throughout the value chain. This direct engagement is essential for supporting the adoption of regenerative agricultural practices that build resilience against climate change, ensuring that sustainability interventions reach those who can benefit most.

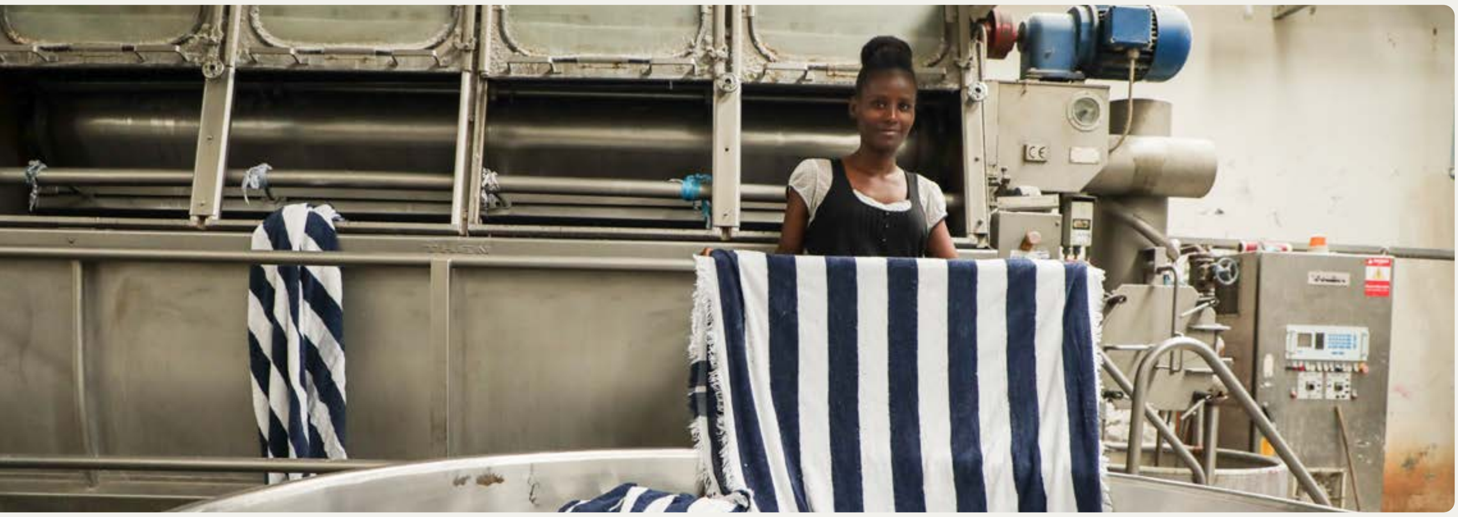
- **Set and meet measurable, verifiable targets:** Brands must establish clear, time-bound, and measurable targets for sustainable cotton sourcing and significantly improve their performance in meeting these targets. This requires robust internal tracking and reporting mechanisms that can withstand external scrutiny, and it requires transparency, so problem areas and issues can be identified.

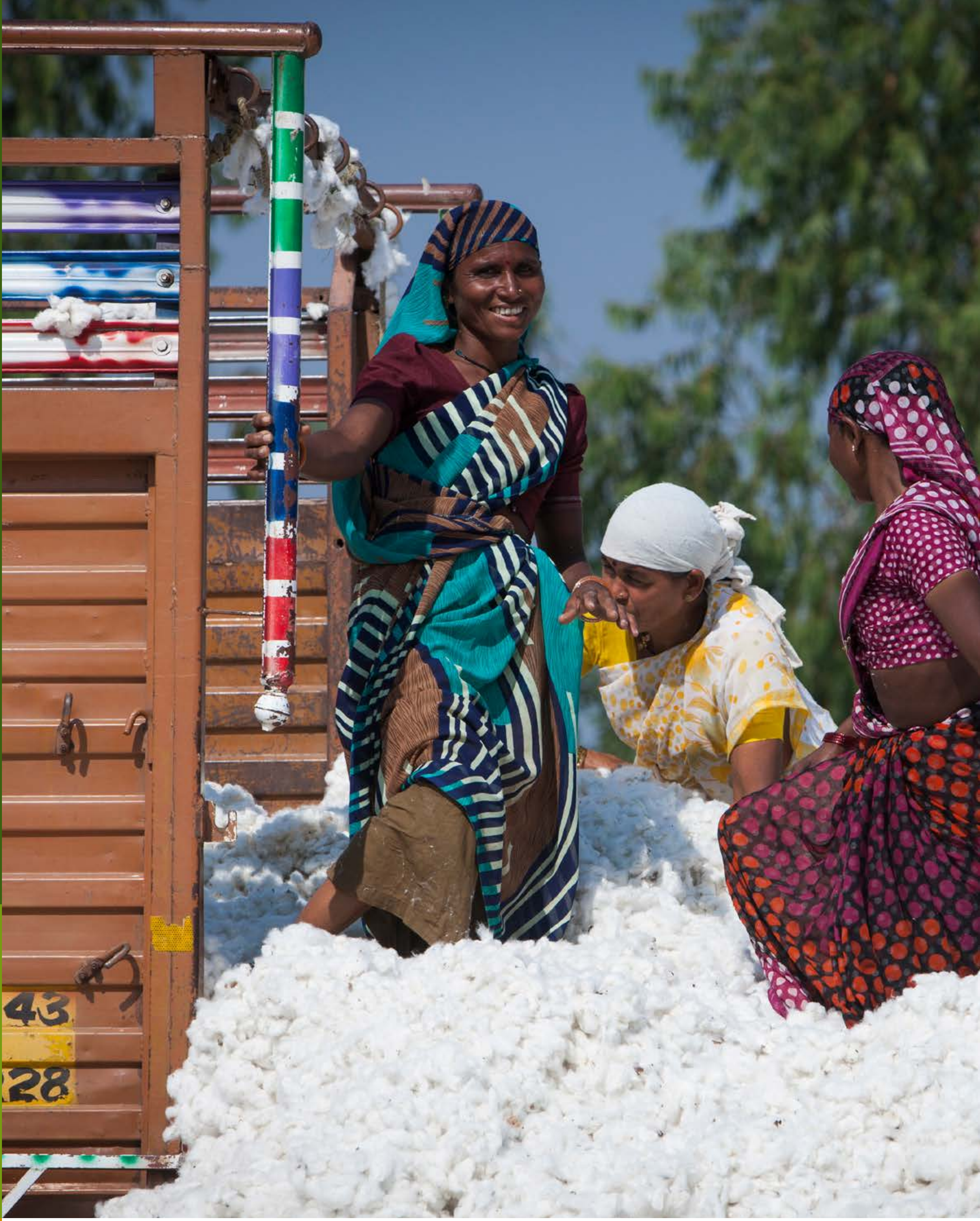
- **Develop sustainable and natural alternatives for synthetic fibres:** A majority of synthetic fibres used in the fashion industry are a byproduct of the petrochemical industry, and therefore, inherently linked to climate change. Very little of this gets recycled. Discarded synthetic clothing also contributes to the dramatic increase in microplastics in our bodies and environment. We call on sportswear and outdoor brands to put new energy into seeking more sustainable alternatives.

- **Evaluate your material mix and set new targets:** To operationalize a new attitude towards natural fibres, we urge companies to analyze the composition of their material mix and set new, achievable targets that ensure a higher proportion of natural fibres to synthetic.

- **Update your procurement practices:** A sustainable supply chain is a shared responsibility. Update your procurement practices to ensure they allow partners across the value chain to contribute to sustainable production. Procurement practices should not create perverse incentives or reduce income for producers. This means going beyond just purchasing 100% of cotton from certified sources, and taking responsibility for improving sustainability in your value chain and the conditions under which your products are grown and made. Your due diligence must also consider cotton farming and identify, mitigate, and remedy risks to the farm level.

- **Ensure that fair pricing is a part of your model:** When we talk about sustainable sourcing, we're often referring to a list of sourcing conditions that buyers demand from their suppliers. Downstream buyers expect their suppliers to get certified, to assure quality, to fill in documents, draft policies and deliver data. Fair pricing is almost never part of the sustainable procurement process.





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good on you

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