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Sustainable
Cotton Cluster



THE RETAIL CHALLENGE

Lowest-cost global sourcing have begun to show diminishing marginal returns and high sustainability risks

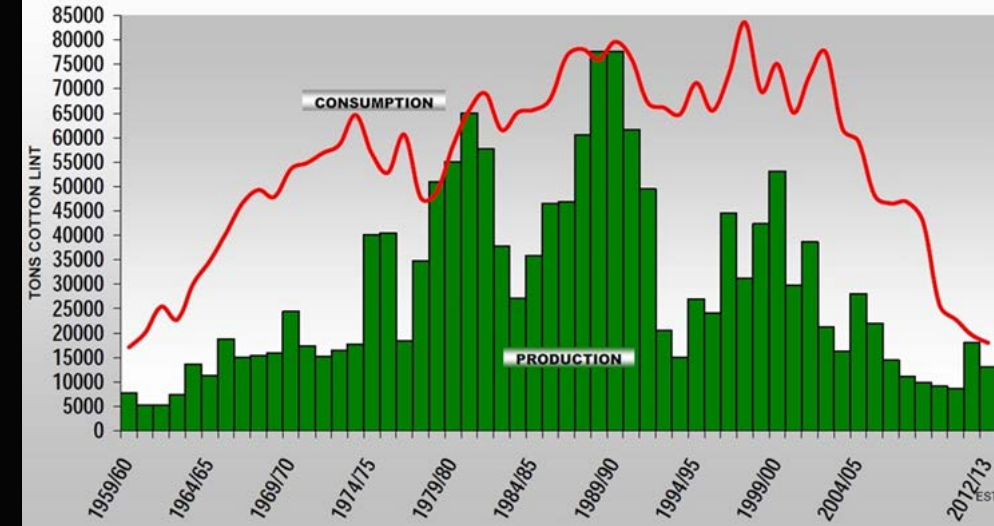
Next Frontier: Innovative Business Model that effectively enable Quick Response and Sustainable Sourcing

THE SOUTH AFRICAN CHALLENGE

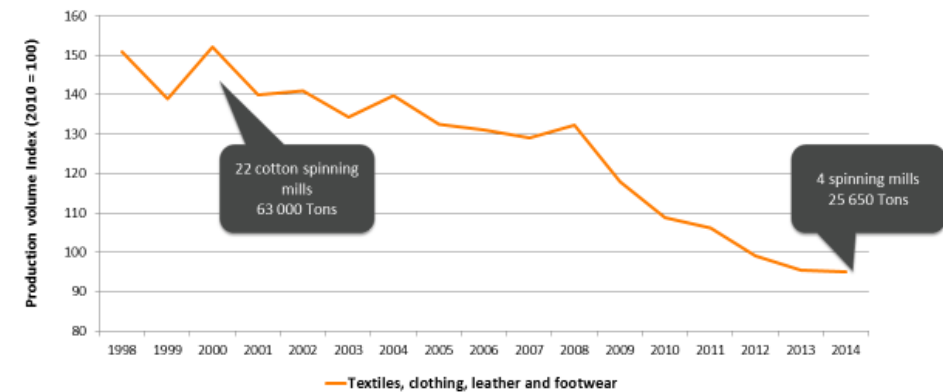
Import orientation fragmented the industry and resulted in divestment and a total lack of united strategic leadership

Cotton Industry at a point of total collapse and in desperate need for revival

SA COTTON SUPPLY & DEMAND SINCE 1959



Production volume indices for TCFL



VISION:

Southern Africa is a preferred
International sourcing
destination for Sustainable
Textile & Apparel Products

Leapfrog to Global Best Practice



CREATE A CLUSTER TEAM



INDUSTRY

- Cotton SA
- Cotton Producers
- Cotton Ginners
- Textile Manufacturers
- Garment Manufacturers
- Retail Brands
- Consumer Council
- Organised Labour
- Government




Sustainable
Cotton Cluster

Cluster Manager



ACHIEVEMENTS SINCE 2014

- 669%  Sustainable Cotton Production
- Local Beneficiation from 7% to 42%
- 7,000 Jobs created
- 1,300 Small Enterprises established
- 1,600 Farmers trained
- 2,300 Industry Stakeholders trained
- R640 million Capital Investment
- R120 million Supply Chain Finance

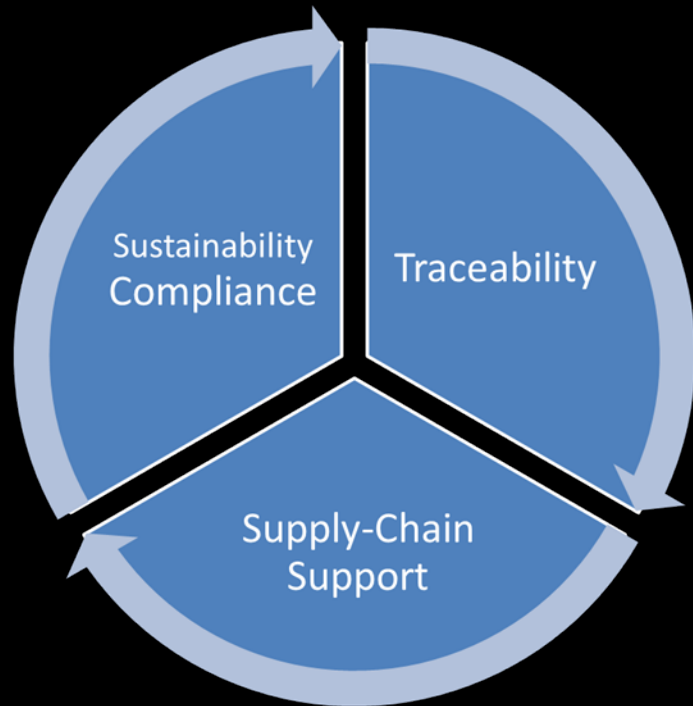


KEY ENABLING FACTORS

- Demand-driven Integrated Supply Chain Programmes
- Supply Chain Traceability Platform
- Off-Balance Sheet Supply Chain Finance Instruments
- Supply Chain Insurance Cell Captives



TRACEABILITY PLATFORM



WAY FORWARD

- System Demonstrator Implementation
- Commercialisation
- Cluster Initiatives identified for Turkey, India, West Africa, etc.

