Act as if what you do makes a difference.
It does. by William James
FOREWORD
THE APPAREL INDUSTRY: AN OVERVIEW
SUSTAINABILITY IN FASHION
THE FUTURE OF FASHION FOR BUSINESSES AND CONSUMERS
RECONCILING BUSINESSES AND CONSUMERS
THE APPAREL INDUSTRY: AN OVERVIEW
An important actor for society

The oldest known fashion item dates back 130,000 years. Since then, fashion - beyond practicalities - has become a visual expression of identity. The industry’s dual role of differentiation and assimilation allows individuals to express their differences, while empowering them to claim their belonging to a group, a culture or a movement.

Globalized, complex and competitive

An early actor of globalization, the TCLF sector is characterized by a “winner take all” intense competition and by a discount culture, which both engender a race to the bottom on margins. Despite technological advances, margins are further stressed by a complex supply chain with countless intermediaries.

“It is not uncommon for some producers of shoes and apparel to have more than 1,000 suppliers scattered across several dozen countries.”

Fulfilling a sophisticated demand

Technology and the rise of e-commerce paved the way for more sophisticated consumers, increased demand for personalization, and instant gratification expectations. The increased competition in supply meets an increased and more influential customer demand leading to an ever-growing complexification and frequency of fashion cycles constantly pushing demand and production upwards.

“’The Textile, Clothing, Leather and Footwear (TCLF) sector is characterized by geographically dispersed production and rapid market-driven changes, providing employment opportunities to millions of workers worldwide especially for young women. Due to the scale and the profile of workers employed, the sector offers great potential to contribute significantly to economic and social development.”

International Labour Organisation - UN Agency

Sustainable Fashion Blueprint 2018
World’s 7th largest economy

In 2016, the global TCLF industry was a €1 trillion market which would make it the 7th largest economy on the planet.\(^5,7,8\) With over €200 billion turnover, the sector was twice as big as the computer and electronics sector.\(^9\). It is the one of the biggest manufacturing sector in Europe\(^10\) and represents 40% of all manufacturing jobs in South Asia.\(^11\).

Labor intensive

The fashion industry employs over 300 million people across the value chain; almost the population of the United States, as of December 31, 2017. The sector is often a crucial source of employment and a big GDP contributor for emerging as well as developed economies. Though many individuals around the world may work within the same sector, globally, there does exist a disparity between the wages, working conditions, workers’ rights, and gender-specific treatments offered to manufacturing employees.

2nd most polluting industry

Over 350,000 km\(^2\) of land - roughly the size of Germany - is dedicated to cotton production alone. An estimated 93 billion m\(^3\) of water - enough for 5 million people to survive - is used by the industry every year.\(^5,12\) Around ½ million tons of microfiber or the equivalent of 3 million barrels of oil\(^13\) is dumped in the ocean every year, nearly the same amount as the DeepWater Horizon spill.\(^14\).

<table>
<thead>
<tr>
<th>GDP (€T) (^6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. US 15.2</td>
</tr>
<tr>
<td>2. China 9</td>
</tr>
<tr>
<td>3. Japan 4</td>
</tr>
<tr>
<td>4. Germany 2.9</td>
</tr>
<tr>
<td>5. UK 2.1</td>
</tr>
<tr>
<td>6. France 2.0</td>
</tr>
<tr>
<td>7. Apparel 1</td>
</tr>
</tbody>
</table>

Sustainable Fashion Blueprint 2018
The global fashion survey was conducted between August 14, 2017 and September 4, 2017. Complete survey responses were obtained from 123 survey takers.

The major aspects of the fashion industry that consumers would like to change:
1. Worker and animal exploitation
2. Creation of unrealistic body images
3. Artificial creation of need (e.g. fashion cycles / trends)
4. Production process
5. Access to affordably priced name brands
6. Transparency / traceability (e.g. company actions / supply chain)

The estimated percentage of consumers that shop for apparel at least once every three months.

The top 6 criteria used by consumers to purchase apparel. The percentages represent the proportion of consumers that included the factor in their top 3 criteria used for apparel purchases.

“Sustainability” means different things to different people. This word cloud illustrates how a concept, such as sustainability, has varying definitions or topics associated with it.

The estimated percentage of consumers unwilling to sacrifice any characteristic of apparel to buy a sustainable product.

Consumers identified that the lack of knowledge / visibility, the high price, and the “limited” style of sustainable fashion apparel as the greatest barriers to purchasing sustainable clothing.
II. SUSTAINABILITY IN FASHION
Sustainability is gaining traction in the fashion world. Consumers, particularly Millennials and Generation Z's, are becoming increasingly aware of the challenges of sustainability, leading to changes in shopping habits and expectations for better, more sustainable products and new ways of consuming fashion. This is creating an area of differentiation for companies that attempt to address these changes through identifying more sustainable ways to work across their products' whole life cycle. According to the Cotton Council International and Cotton Incorporated Global Environment Survey, sustainability is a high priority for consumers in countries such as, India (81 percent), Mexico (69 percent), Italy (62 percent), and China (60 percent). However, the increased awareness of sustainability in the fashion world has yet to lead to a universal definition of sustainable fashion. Consumers and fashion professionals alike are identifying what sustainable fashion means for him or herself. For Andrea Sanabria Oviedo, the founder of La Petite Mort, “Sustainable fashion is a concept still evolving so it’s hard, even now, to make a unanimous definition. To me, it’s about values, whether it’s linked to animal rights, environmental impact, consumption habits or social development. You don’t have to be all of them (I don’t think it’s even possible) but each one of these are an aspect of sustainable fashion aiming towards the same goal: to make a more human and responsible industry.” For the purposes of this report, sustainable fashion will be a similar comprehensive concept of environmental and socio-economic values as defined by the founders of Mamoq, a sustainable fashion marketplace.
“Sustainable fashion broadly refers to the design, production, distribution, consumption, and disposal of apparel with respect and consideration for the health and longevity of our natural environment, and the welfare of the animals and humans involved. It aims to limit the socio-environmental cost of fashion, while maximizing its lifetime value and positive impact.”

Madeline Petrow and Lenny Leemann - founders of Mamoq
III. THE FUTURE OF FASHION FOR BUSINESSES AND CONSUMERS
WHY ADOPT SUSTAINABLE FASHION

<table>
<thead>
<tr>
<th>BUSINESSES’ LIMITATIONS</th>
<th>EMPOWERED CONSUMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increasing</strong> raw material costs, <strong>heightening</strong> reputational risk, and <strong>shifting</strong> consumer demands are challenging fashion companies to redefine their long-term strategies.</td>
<td><strong>Connected</strong> consumers are exposed to more fashion choices than ever before. Technology has <strong>empowered</strong> them to demand more transparency, accountability, and quality.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NEW VALUE PROPOSITIONS</th>
<th>NEW CONSUMER HABITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainable fashion initiatives are at the core of a new category of “positive impact” <strong>new actors</strong> in the fashion sector. These initiatives also help existing businesses <strong>manage</strong> costs, <strong>minimize</strong> reputational risk, <strong>diversify</strong> revenue streams, and <strong>address</strong> consumer expectations.</td>
<td>Sustainable fashion initiatives can help consumers, especially Millennials and Generation Zs, with lower disposable income than their parents to gain easy access to ethically-made apparel from a transparent production line. These initiatives can also educate consumers on the importance of sustainability, and show that sustainable fashion can be of good quality, affordable and diverse.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUSTAINABLE FASHION PRINCIPLES</th>
<th>WILL HELP BUSINESSES UPGRADE THEIR OPERATING MODELS TO ADDRESS INDUSTRY CHALLENGES AND CATER TO POWERFUL, INFORMED CONSUMERS</th>
</tr>
</thead>
</table>

SUSTAINABLE BUSINESS INITIATIVES

01. Closing the loop
   - Apply recycling and circular economy principles

02. Giving back
   - Build businesses that deliver for the consumer and give back to society and nature

03. Extending life
   - Make apparel that will stand the test of time

04. Managing resources
   - Optimize the use of manpower and natural resources

05. Revamping supply
   - Assess and transform the supply chain

06. Pushing boundaries
   - Explore beyond the present by preparing for future technologies
## 01. Closing the loop

From resources to goods and back to resources

Initiatives which apply circular economy principles and recycling to extract value from discarded apparel, help reduce waste, and avoid unnecessary consumption of natural resources.

### SUMMARY

<table>
<thead>
<tr>
<th>RECYCLING</th>
<th>UP-CYCLING</th>
<th>CRADLE TO CRADLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reprocess old or used apparel</td>
<td>Repurpose consumer waste into higher purpose items</td>
<td>Design apparel that can be regenerated indefinitely</td>
</tr>
</tbody>
</table>

### ACTORS*

<table>
<thead>
<tr>
<th>Reprocess old or used apparel</th>
<th>Worn Again</th>
<th>Pure by Luce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repurpose consumer waste into higher purpose items</td>
<td>Stormiepoodle</td>
<td>Resole</td>
</tr>
<tr>
<td>Design apparel that can be regenerated indefinitely</td>
<td>aWearness</td>
<td>Elvis &amp; Kresse</td>
</tr>
</tbody>
</table>

### GAINS

<table>
<thead>
<tr>
<th>Reprocess old or used apparel</th>
<th>Cost savings</th>
<th>Brand image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repurpose consumer waste into higher purpose items</td>
<td>Cost savings</td>
<td>No down-cycling</td>
</tr>
<tr>
<td>Design apparel that can be regenerated indefinitely</td>
<td>Reduced material costs</td>
<td></td>
</tr>
</tbody>
</table>

### LIMITS

<table>
<thead>
<tr>
<th>Reprocess old or used apparel</th>
<th>Price war</th>
<th>Down-cycling</th>
<th>Resource intensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repurpose consumer waste into higher purpose items</td>
<td>Customer prejudice</td>
<td>Limited scalability</td>
<td></td>
</tr>
<tr>
<td>Design apparel that can be regenerated indefinitely</td>
<td>Complex</td>
<td>High upfront investment</td>
<td></td>
</tr>
</tbody>
</table>

* Refer to Annex 1 for additional examples.
02. Giving back

Grow society and businesses hand-in-hand

Initiatives with a dual mission – businesses strive to become successful, while also committing to a social mission. The social mission may be embedded at the core of the company’s operating model or it may be an external commitment made by the company to a stand-alone cause.

<table>
<thead>
<tr>
<th>SUMMARY</th>
<th>ACTORS*</th>
<th>GAINS</th>
<th>LIMITS</th>
</tr>
</thead>
</table>
| BOGO    | For every item purchased, one item is given to a recipient in need | Jimmy Fairly
Wearfigs | Positive social impact
Improved brand image | Past initiatives have gained a bad reputation
Often perceived as a temporary solution | Could present an issue of zero-sum game |
| PROFIT SHARING | Commit to donating a share of profits to a not-for-profit or NGO | Tblr
Votch | |

* Refer to Annex 1 for additional examples.
03. Extending life

**Make the most of the apparel you own**

These initiatives actively support and encourage consumers’ attempts to extend their apparel’s lifespan through appropriate care.

<table>
<thead>
<tr>
<th>SUMMARY</th>
<th>ACTORS*</th>
<th>GAINS</th>
<th>LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CLOTHES UPGRADE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional service to patch and repair worn apparel</td>
<td><em>Flock by Nature</em></td>
<td>Customer trust</td>
<td>Additional costs</td>
</tr>
<tr>
<td></td>
<td><em>Nudie Jeans</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LIFETIME WARRANTY</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lifetime warranty of the apparel</td>
<td><em>Darntough socks</em></td>
<td>New revenue Stream</td>
<td>Complex logistics</td>
</tr>
<tr>
<td></td>
<td><em>Feetures</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SECOND HAND</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apparel in good condition sold in secondary market</td>
<td><em>Filipa K</em></td>
<td>Product insight</td>
<td>Revenue loss</td>
</tr>
<tr>
<td></td>
<td><em>Vestiaire Collective</em></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Refer to Annex 1 for additional examples.*

Sustainable Fashion Blueprint 2018
Managing resources

Producing more with less

These initiatives aim to meet market demand, while minimizing environmental impact and maximizing ethical practices.

<table>
<thead>
<tr>
<th>SUMMARY</th>
<th>ACTORS*</th>
<th>GAINS</th>
<th>LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW MATERIALS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New fabrics and production techniques help reduce environmental impact and protect workers’ health</td>
<td>Evrnu fiber</td>
<td>Less pre-consumer waste</td>
<td>Higher production costs</td>
</tr>
<tr>
<td>Bloomfoam</td>
<td>Compliant with circular economy</td>
<td></td>
<td>Limited application</td>
</tr>
</tbody>
</table>

| ETICAL SOURCING | | | |
| The brand commits to an ethical, environmentally friendly sourcing | Rosenbergcph | Reduced environmental impact | Increased overhead |
| Elsk | Brand image | Complexity of the supply chain |

| SOCIAL EMPOWERMENT | | | |
| Brands committed to empowering workers by providing them fair rights as actors in the fashion industry | Mayamiko | Increased creativity and productivity | Increased price |
| Tales of Thread | Differentiation of product | Challenge to scale |
| | | Public stigma |

* Refer to Annex 1 for additional examples.
Changing how we produce, distribute, and consume fashion

Away with established supply chain and business models - These initiatives redefine how apparel can be produced and consumed with sustainability at the core of a business’s operations.

<table>
<thead>
<tr>
<th>SUMMARY</th>
<th>ACTORS*</th>
<th>GAINS</th>
<th>LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAAS</td>
<td>Customers can rent their apparel and subscribe to fashion as a service</td>
<td>Mud Jeans</td>
<td>Continuous revenues</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Le closet</td>
<td>Ripple environmental effects</td>
</tr>
<tr>
<td>PRE ORDER</td>
<td>Apparel made upon order</td>
<td>Two thirds</td>
<td>Diversity of offering</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Elsien Gringhuis</td>
<td>Pushes consumerism</td>
</tr>
<tr>
<td>ULTRA FASHION</td>
<td>One-time use of apparel entirely made of biodegradable or recyclable material</td>
<td>Tami Care</td>
<td>Limited waste</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Growable Gowns</td>
<td>No inventory</td>
</tr>
<tr>
<td>LOCAL</td>
<td>Brand dedicated to local production only</td>
<td>Le slip français</td>
<td>Increased revenue</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ted &amp; Bessie</td>
<td>Pushed consumerism R&amp;D intensive</td>
</tr>
</tbody>
</table>

* Refer to Annex 1 for additional examples.
## 06. Pushing boundaries

<table>
<thead>
<tr>
<th>Technology</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Big Data &amp; AI</strong></td>
<td>Big data and AI will push the limits of customer insight, help better forecast production and optimize supply chains.</td>
</tr>
<tr>
<td><strong>AR/VR/MR</strong></td>
<td>AR/VR/MR will play a big role in consumer education and awareness. It will also help redefine fashion trends and production by boosting the on-demand and tailored production processes.</td>
</tr>
<tr>
<td><strong>3D Printing</strong></td>
<td>3D printers will reduce pre-consumer waste, boost local and bespoke production, and broaden the range of sustainable material, which can be used to produce apparel.</td>
</tr>
<tr>
<td><strong>Blockchain</strong></td>
<td>Blockchain technology will improve supply chain transparency and increase product traceability. It will help companies better assess their environmental and social impact, as well as assist fashion companies in creating a better implementation of closed loop productions.</td>
</tr>
<tr>
<td><strong>New materials</strong></td>
<td>Self-healing, connected and color changing; the textile industry will produce fabrics made to last.</td>
</tr>
</tbody>
</table>

*Refer to Annex 3 for additional examples.*

**Image:** Liberty Guiding the People, Danit Peleg
In order to implement sustainable fashion principles, incumbents will need to make long-term commitments and investments while new entrants will face high barriers to entry and scalability challenges. Transparency will become key to a company’s success in the industry and currently stands as the biggest technical challenge to overcome.

**Challenges**

Until recently, the fashion industry’s incumbents considered sustainability to be a 
source of overhead for their companies. Measures of sustainability were only implemented to meet regulations, uphold brand image, and match the competition. Fashion houses set off to sponsor and run costly stand-alone neutral impact programs aimed at offsetting the perceived environmental and social impact of their core activity.

Since then, the industry has come to re-assess the potential value-add of sustainability and the gains sustainable fashion initiatives can yield for a business when embedded directly at the core of the company’s value proposition and consistently throughout the company’s supply chain. When choosing to implement such principles, an incumbent will face at least 3 types of challenges. First, an incumbent needs to make a long-term commitment to sustainable fashion principles which will involve dedicating a budget, headcount and time across the organization for a long-term implementation of sustainable initiatives. Second, management has to be aware that implementing such principles will have a direct impact on margins, which the incumbent will adapt to by adopting new business practices and services (cf. previous pages). Third, the corporate governance structure of the company will be challenged as agency issues arise. As such, the corporate governance strategy should be reviewed to factor in success measures on sustainability and favor long-term sustainability initiatives.

New entrants, who choose to implement sustainable fashion initiatives from the onset, will face a different set of challenges. These entrants often start as small players on local markets and face high barriers to entry when it comes to national and international markets, especially as they compete on prices and brand recognition with big established brands. E-commerce and social media will have an important role in lowering those barriers.

Finally, for both incumbents and new entrants, the biggest challenges of all will be transparency. Supply chain in the industry is always extremely complex and it will be challenging for both incumbents and new entrants to establish and maintain a transparent and trusted supply chain. Here, people look towards technology and the promises of AI and blockchain to tackle those issues. Collaboration between actors, open-sourcing and certification will also be key to the successful adoption of sustainable fashion principles.
IV. RECONCILING BUSINESSES AND CONSUMERS
“Transparency alone does not represent the sort of structural, systemic change we would like to see for the fashion industry - but it helps us get there. Transparency helps to reveal the structures in place so we can better understand how to change them. Transparency shines a light on issues often kept in the dark. It is an important first step towards positive change.”

Fashion Revolution 18

ACTION ITEM CHECKLIST
NEXT STEPS: BUSINESSES FOR SUSTAINABILITY

1. GET YOUR COMPANY AND CUSTOMERS ON-BOARD*

   Sustainability is seen by certain consumers as an add-on. Your company can educate consumers on what sustainability can be and dispel prejudices against sustainable fashion.

   Open a dialog with customers to understand their aspirations and commit to meeting their aspirations via sustainable initiatives. Social platforms provide a cost-effective medium to broadcast your message and listen to customer reactions.

   Join industry initiatives, network and partner with other actors on sustainable projects, and learn by example from early adopters. Look beyond your industry, leverage the expertise of sustainability and circular economy experts who will guide you.

2. DEDICATE RESOURCES*

   Allocate resources to create and implement the company’s sustainable principles. These principles can be addressed by, but not limited to, designing waste out of your supply chain, adopting new business and distribution models, and staying on top of the latest innovations.

   Businesses can choose from three different structures to ensure the resources dedicated will be used efficiently: a separate department or team, a separate entity, or a joint venture between the company and other industry actors.

* Refer to Annex 2 for a list of initiatives, organizations, or ethical marketplaces that supports this action item.
3. COMMIT TO TRANSPARENCY*

Create an environment where transparency is a key goal. If necessary, pledge to this goal with other industry actors. Quantitative metrics of the company’s environmental and socio-economic issues can be tracked and published, both within the company and publicly. The company can also request similar transparency from others in its supply chain. Internally, these metrics should be used to measure progress on sustainability goals. The company should aim for continuous improvement in the metrics and use its measurements to identify areas for improvement. Externally, easily accessible metrics (e.g. maintenance tips or post-purchase indications) through a mobile app or another medium would allow consumers to see the company’s commitment to the issues, and to better understand the social and environmental impact of their purchase.

4. ENCOURAGE INITIATIVES*

Foster sustainable initiatives both in-house and externally. Internally, strive for transparent and fair working conditions (e.g. fair wages, health and work-life balance programs) for any workforce contributing to your supply chain and create employee incentives to encourage the entire organization to actively seek sustainable improvements. Externally, partner with innovative start-ups that can help guide or further your sustainable initiatives. Crowdsourcing and nurture innovative problem solving by sponsoring design challenges and engaging young talent to solve the most intricate challenges of sustainable fashion.

* Refer to Annex 2 for a list of initiatives, organizations, or ethical marketplaces that supports this action item.
ACTION ITEM CHECKLIST

NEXT STEPS: CONSUMERS FOR SUSTAINABILITY

SHORT TERM

1. BE A CONCIOUS CONSUMER
   Do your research on how the fashion industry impacts society on an environmental and socio-economic level. Being aware and informed will help you determine what impact you want to have on the environment and society.

2. TAKE CARE OF YOUR CLOTHING
   Proper upkeep of your clothing may allow your clothes to have a longer lifespan. Wash your clothes less often and mend your clothing when needed. Refer to organizations, like Care Label Project, to educate yourself on how to best to care for your clothes.

3. RECYCLE CLOTHING*
   Donate your clothing to charities/clothing banks, refashion your clothes through DIY up-cycling or repurpose your clothes.

4. QUESTION YOUR NEEDS
   Avoid impulse buys – Learn how to distinguish between need and want and buy clothing only when needed.

5. DO LIGHT DUE DILIGENCE
   Review clothing labels and take the information collected into consideration – Where was the garment made (e.g., locally)? Is the apparel made of natural fibers (e.g., cotton, tencel, and wool)? Will the apparel require significant washing or is it dry cleaning only?

6. EDUCATE AND LEARN FROM OTHERS
   Share your tips and interests with your friends.

7. BEWARE OF GREENWASHING
   Review clothing labels, company websites, and ethical marketplaces to gain knowledge of a brand’s commitment to sustainability and ethics.

8. FIND NEW SOURCES OF CLOTHING*
   Shop at brand-specific clothing stores, vintage shops, ethical marketplaces, and rental clothing stores.

9. VOTE WITH YOUR WALLET AND VOICE
   Buy from brands that offer sustainable apparel and show companies your appreciation through repeat purchases. Additionally, show your appreciation by using social media to raise company’s brand awareness.

10. CREATE A CAPSULE WARDROBE
    Buy less, choose well – Learn to choose quality over quantity. Create an edited collection of versatile clothing that can be mixed and matched to obtain maximum use out of minimal possessions. Use apps, like Cladwell, to identify your style, label the unneeded items, donate or sell the unneeded items, and create new outfit combinations.

* Refer to Annex 2 for a list of initiatives, organizations, or ethical marketplaces that supports this action item.
LONG TERM

1. GET INSPIRED*
Gain knowledge and inspiration through four activities: reading, watching, listening, and following. Read – books, blogs, and websites. Watch – documentaries. Listen to – podcasts, and Follow – sustainable fashion advocates on social media.

2. KNOW BEFORE YOU BUY*
Perform in depth due diligence about a brand before making purchases. The due diligence process can include, but is not limited to, reviewing a brand’s ethical and environmental reports, recent news, certifications / memberships in sustainable initiatives, and ethical rating.

3. BE HANDS-ON*
Get involved with NGOs and not-for-profit organizations. Find how you can have a positive impact on society.

4. SPREAD THE WORD
Use your voice on social media to help raise awareness of sustainability, to propel sustainability into a fashion trend for each season, and to share your journey as a conscious consumer.

5. RAISE CONSCIOUS CONSUMERS*
Educate your children to give them the freedom to make conscious consumer choices. Education resources and programs are available to consumers to learn about sustainability and how to live a sustainable life.

* Refer to Annex 2 for a list of initiatives, organizations, or ethical marketplaces that supports this action item.
Actors
An active participant in a process, event, sector or industry.

BOGO
Buy One Give One, an operational business model adopted by certain retailers whereby for every item bought a matching donation will be made by the business to a community in need.

Circular economy
"In a circular economy, the value of products and materials is maintained for as long as possible. Waste and resource use are minimised, and when a product reaches the end of its life, it is used again to create further value. This can bring major economic benefits, contributing to innovation, growth and job creation." 20

Conscious consumer
A consumer who “purchase[s] products or services produced with social and environmental considerations in mind. It can be described as consumers “voting with their dollars,” by purchasing products and services produced responsibly.” 21

Discount culture
A discount culture takes place in an industry when the biggest players or all the players in the industry enter a war on price and increasingly apply discounts on their products to attract customers.

Down-cycling
"Down-cycling, also referred to as cascading, describes the recycling of waste in cases where the recycled material is of lower quality and functionality than the original material.” 22

DIY
Abbreviation for “Do It Yourself” which refers to “the activity of decorating or repairing your home, or making things for your home yourself, rather than paying someone else to do it for you.” 23

Greenwashing
“[…]when a company or organization spends more time and money claiming to be “green” through advertising and marketing than actually implementing business practices that minimize environmental impact.” 24

Ethical
relating to beliefs about what is morally right and wrong. In this report, it refers specifically to belief of moral right for the fair and equal treatment of the workforce in the fashion industry.

Product life cycle
“describes the period of time over which an item is developed, brought to market and eventually removed from the market. The cycle is broken into four stages: introduction, growth, maturity and decline.” 25

Recycling
The action of reprocessing a material or an object in order to make it suitable for reuse.

Repurpose
The process of finding a new use for a used piece of apparel, shoe or fashion accessory.

Reputational risk
“Reputational risk is a threat or danger to the good name or standing of a business or entity. Reputational risk can occur through a number of ways: directly as the result of the actions of the company itself; indirectly due to the actions of an employee or employees; or tangentially through other peripheral parties, such as joint venture partners or suppliers.” 26

Transparency
In the context of this report “transparency” refers to the capability and willingness for businesses involved in the fashion supply chain to transparently disclose the environmental and social impact of its activities.

Turnover
The value of the sales performed in a certain period (net of discounts and taxes).

Up-cycling
The opposite of down-cycling, up-cycling describes the “reuse (discarded objects or material) in such a way as to create a product of higher quality or value than the original.” 27
## ANNEX 1 – EXISTING SUSTAINABLE FASHION ACTORS

Below are a few examples of the companies, organizations, and initiatives that are paving the way to a sustainable future.

### Closing the loop

**Recycling**
- Third parties
  - I:CO
  - Worn Again
- Cross-Industry partnerships
  - Timberland

**Up-cycling**
- Reetaus
- Mosevic
- Mundao
- re:newcell

**Cradle-to-cradle**
- Brands
  - C&A
  - aWearness
  - Saiboo
- Certification Organization
  - C2C Institute

### Giving back

**BOGO**
- Wewood
- Shoemates
- Bixbee
- Bombas
- Roma boots
- Out of Print Clothing

**Profit sharing**
- From Babies With Love
- Serengetee
- Feed Projects
- Kipepeo

**They help you do it**
- 1% for the planet
- Founders Pledge

### Managing resources

**New materials**
- Mango materials
- Tami care
- Singlethread knitwear
- Algiknit
- Petit Pli

**Extending life**

**Clothes upgrade**
- Patagonia
- The Good Wardrobe

**Lifetime warranty**
- Filson
- Davek

**Second hand**
- Nudie Jeans
- La Refinery

### Pushing boundaries

**3D printing**
- Heisel
- Danit Peleg

**Ethical sourcing**
- Soko
- Sudara

**Social empowerment**
- Soieries du Mekong
- The Giving Keys

**Revamping supply**

**FaaS**
- UFTD (lease)
- E&C (subscription)

**Pre-order**
- Threadless

**Local**
- Le slip français
ANNEX 2 – NEXT STEPS: BUSINESSES AND CONSUMERS

Below are a few examples of the companies, organizations, initiatives, and individuals that are paving the way to a sustainable future.

**Businesses**

Get your company and customers on-board

- IDEO CoLab
- Industry Of All Nations

Commit to transparency

- Human Rights Watch - Transparency Pledge
- Nike Manufacturing Map
- Provenance.org

Encourage initiatives

- Circular Fibre Initiative
- Apparel Coalition
- Textile Exchange

**Consumers**

Recycle clothing

Charities / Clothing banks

- Goodwill
- TRAID

DIY Up-cycling

- Love Your Clothes

Find new sources of clothing

Ethical marketplaces

- B Corp
- GOTS
- Oekotex
- Cradle-To-Cradle
- EU Eco Label
- Global Recycle Standard

Get inspired

Read

- True Fashion Collective
- Make It Last
- Circular Fashion
- The Good Trade
- Sustainable Fashion
- Ecouterre

Watch

- True Cost
- The Machinists
- Minimalism
- The Next Black

Listen

- Conscious Chatter
- Clare Press

Follow

- Eco-Age
- Vivienne Westwood
- Stella McCartney
- Livia Firth

**Know before you buy**

Ethical / sustainable initiatives

- Ethical Trading Initiative
- Made By
- B Corp
- GOTS
- Oekotex
- Cradle-To-Cradle
- EU Eco Label
- Global Recycle Standard

Ethical rating

- Good on You
- Project Just
- Rank A Brand

Charities / Clothing banks

- Done Good

Be hands-on

- Fashion Revolution
- Ethical Fashion Forum

Raise conscious consumers

- Fashion Takes Action
- Fashion Revolution
- The Sustainable Fashion Academy
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6 [reasoning]

Cotton production takes 2.5% of the world's arable land 5
The world arable land stands at 11% of the world’ land
area which is ~130M km².[2] => 356, 474km²
is dedicated to cotton production
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33bn oil barrels produced in 2012 / 4% dedicated to
plastic / 25% of that to textile =>330M oil barrels for 53M
tons of fibres [1]: 1/2M ton of fibre released in the ocean
every year[1] => 3.11M barrel of oil released
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