

CO

Why do Fashion Better

The facts you need to succeed
sustainably in fashion

COMMONOBJECTIVE.CO

MAY 2017

INTRODUCTION

When it comes to making fashion more sustainable, it's easy to feel that small-scale changes won't make that much difference. While several major fashion labels and suppliers are stepping up to the challenge to become more sustainable, **it would be wrong to assume that only the big players can really change things.**

Whatever your company size – or your role within it – decisions you make about design, sourcing and supply can have significant impact.

To make better decisions – and perhaps to help convince others around you to change – you need better information at your fingertips.

This report offers a snapshot of reasons why more sustainable fashion makes sense. It presents compelling facts and figures about consumer and business trends, dwindling resources and environmental impacts.

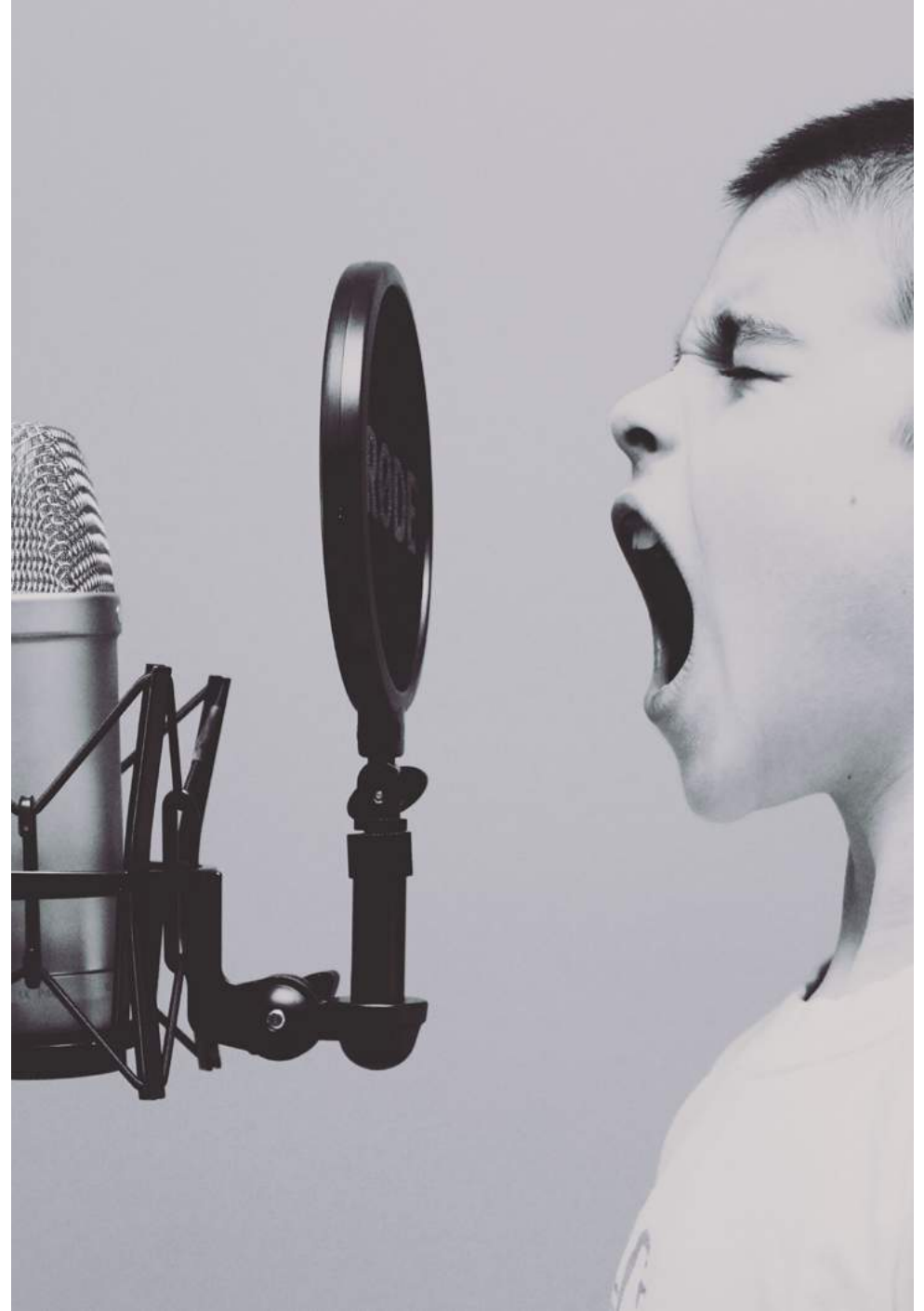
In addition, discover **five ways to make your business more transparent** and why you should. Learn about the **sustainable fabrics that offer a real alternative** to synthetics, cotton and the other major fibres used today.

The aim of this concise report is for you to feel better informed about how to start doing fashion better.

For more, sign up as a **Founding Member on CO** and be the first to access further insights and reports on sustainable fashion when we launch the full site later in 2017.

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Consumers want change



It's a truism that for a business to be successful it needs to understand its customers.

Increasingly, apparel customers, especially so-called millennials, are prioritising ethics when it comes to their fashion choices. They are among a growing group of customers who are seeking out brands with a purpose, and products with a story behind them. For them, there is a human dimension to what they buy and how they buy it.

And there is increasing evidence in sales figures that these new consumers are not just talking about it but are actually acting on their values. In 2015, sales of consumer goods from brands with a demonstrated commitment to sustainability grew by more than 4% globally while those without grew 1%.¹

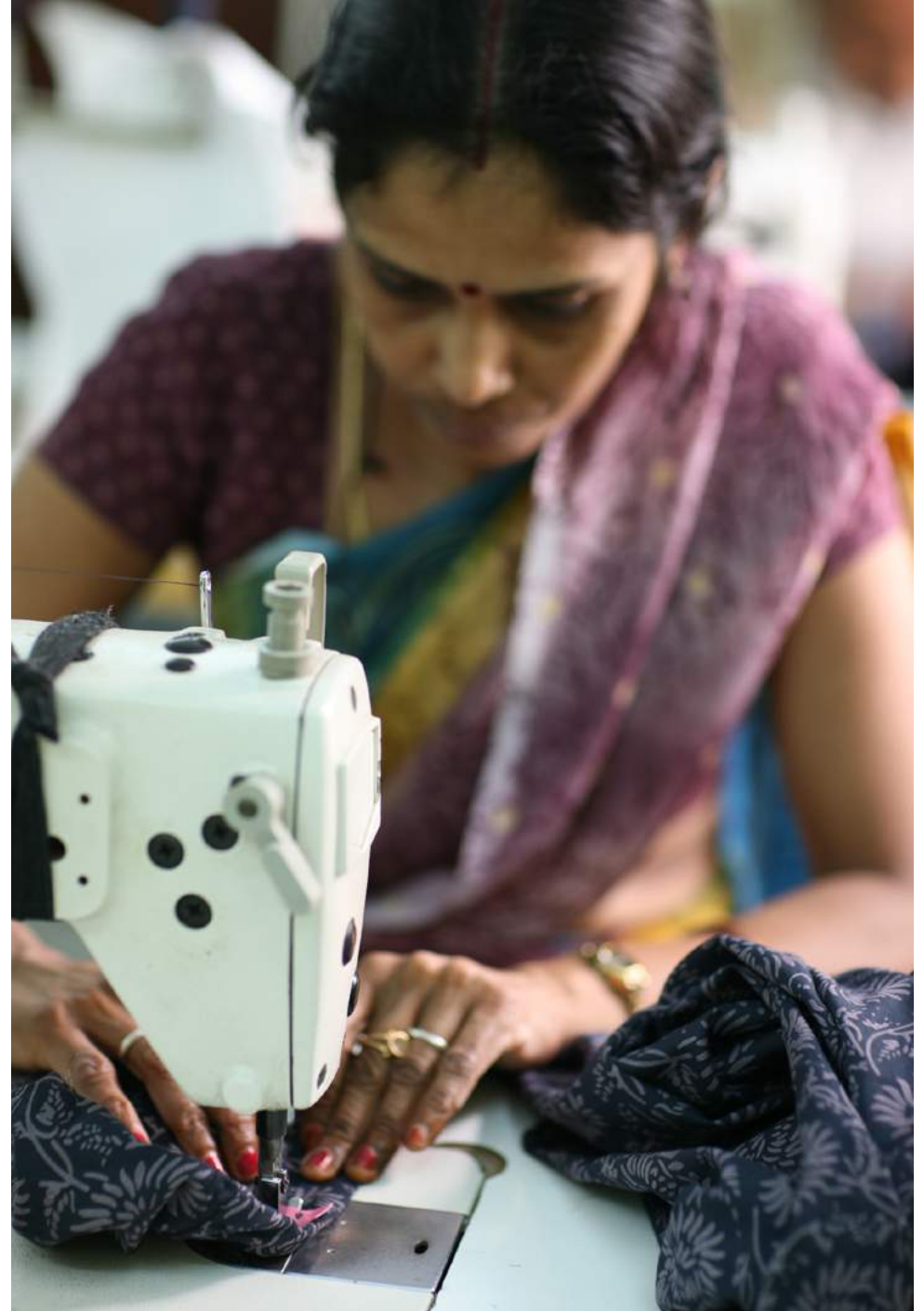
73%

of millennials are
**willing to pay more for
sustainable brands²**

58%

of 16-24 year olds say
**ethics are very or
somewhat important
when shopping³**

Stakeholders **demand** **transparency**



MEHERA SHAW

Stakeholders from consumers to workers to NGOs to investors are demanding greater transparency from fashion companies about their operations and particularly their supply chains.

What is sourced and made, from where, by whom, and in what conditions?

Stakeholders want answers to help make informed decisions about the companies they buy from, work for, engage with and invest in.

Transparency enables people to see where goods are made. In situations where abuses may be occurring, pressure can be put upon the apparel companies concerned to take action.

The Transparency in Supply Chains provision in the UK's Modern Slavery Act requires every organisation running a business in the UK with a total annual turnover of £36m to produce an annual statement explaining what it has done that year to keep slavery and human trafficking out of its supply chains, and from any part of its own business

In April 2017 a coalition of NGOs and trade unions including the Clean Clothes Campaign, Human Rights Watch, and IndustriALL Global Union launched a **Transparency Pledge** calling on 72 major fashion brands to commit to transparency in their supply chains.

Fashion Revolution's annual **Fashion Transparency Index** ranks 100 of the biggest fashion companies according to the supply chain information they share.

In 2017 the average score for all brands was 49 out of 250, roughly 20 per cent of all possible points.

Only eight brands scored higher than 40 per cent and no brand scored above 50 per cent. Three brands scored zero, disclosing nothing at all.

5 ways to be a more transparent business

1. MAP YOUR SUPPLY CHAIN

Know who and where your suppliers are

2. PUBLISH YOUR SUPPLY CHAIN

Best practice⁴ includes publishing:

- the full name of all authorised production units and processing facilities
- the site addresses
- the parent company of the business at the site
- type of products made
- number of workers at each site.

3. PUBLISH YOUR POLICIES

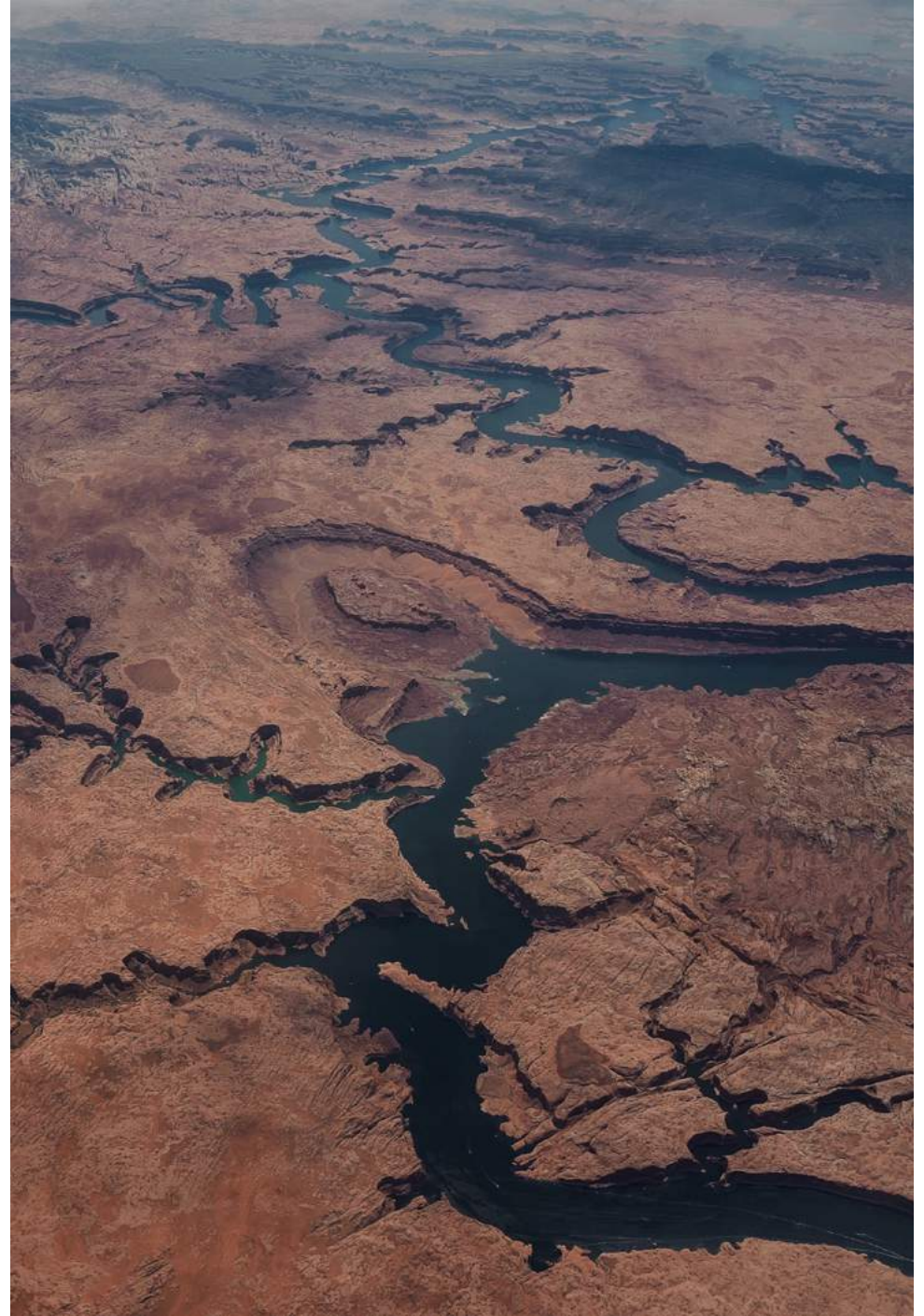
4. COMMUNICATE

What you are doing to implement those policies

5. REPORT

Your social and environmental results as well as your financials

Resources are dwindling





The apparel industry now consumes around twice as much fibre as it did 25 years ago.⁵

This has a major impact – environmentally, socially and ethically – not just on the availability of raw materials but on energy and water consumption and also on levels of pollution. Switching to less resource-intensive materials, including both recycled and new innovative fibres, will increasingly make business sense.

“We can no longer see resources as infinite or ignore externalities.”

KERING

IF YOU USE

SYNTHETICS

Synthetic fibres overwhelmingly dominate apparel fibre consumption. They are entirely man-made and derive from petroleum – that is, crude oil. Synthetics include nylon, acrylic, polypropylene but chief among them is polyester – now the leading global textile fibre consumed - see the graph on p12 to see how it has rapidly overtaken cotton.

Demand for polyester has grown strongly and steadily. In 1980, only 5.2 million tons of polyester were produced globally. By 2014, this reached 46.1 million tons. Across this period, 73.4 per cent of total fibre demand growth was driven by polyester.

Polyester production – sited predominantly in Asia, particularly China – has high environmental costs, as does its disposal. One kilogram of fibre produced consumes 125 MJ of energy and emits 14.2kg of CO₂. Factories without wastewater treatment systems can release potentially dangerous substances including antimony, cobalt, manganese salts, sodium bromide and titanium dioxide.





SWITCH TO..

Despite polyester's dominance, more sustainable synthetic alternatives are gaining in popularity.

RECYCLED POLYESTER

Recycled polyester production consumes 70 per cent less energy than virgin fibre. Almost all recycled polyester in textiles comes from recycling plastic bottles (not recycling clothes).

REPREEVE

Repreve in the US manufactures sustainable textile fibres in this way.

TEIJIN

Japan's Teijin meanwhile takes old polyester garments and recycles them into new polyester raw material.

ECONYL

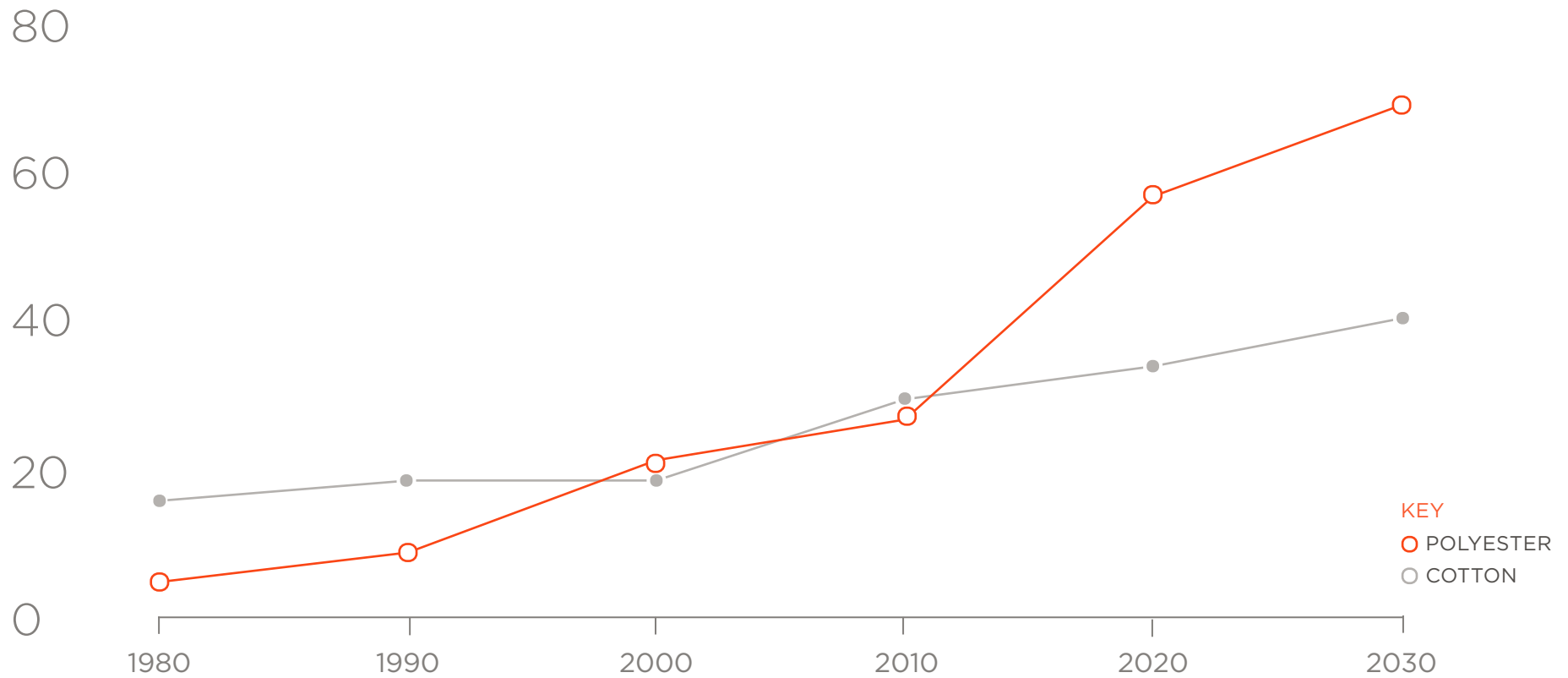
Discarded nylon fishing nets are a primary source for the recycled nylon yarns developed by ECONYL, now being widely used in sportswear.

PLANT-BASED POLYESTER

Plant-based polyester could be an exciting alternative. **FENC Corp.** recently unveiled a 100 per cent bio-polyester shirt made entirely from plants.

Fibre demand: Cotton vs. Polyester 1980-2030

In 2002, polyester overtook cotton for the first time in terms of apparel consumption. It has continued to grow ever since, expanding market share at the expense of all other fibres.⁶



IF YOU USE
COTTON

Cotton has long been a widely traded world commodity and a key revenue source for the developing world, employing an estimated 300 million people. Demand for cotton has fluctuated in the past two decades and growth rates have slowed, as competition from synthetics strengthens.

About 90 per cent of cotton farmers work in the developing world, on smallholder plots of less than 2 ha. Unfair pricing structures and subsidies jeopardise their livelihoods. Cotton is produced in about 100 countries, but is concentrated in four – China, India, the US, Pakistan.

Although a natural fibre, cotton production and processing have major environmental impacts. It takes 20,000 litres of water to make one kilogram of cotton; more than 20m tonnes of cotton are produced yearly. It uses high levels of pesticides, fertilisers and chemicals that affect human health and pollute local eco-systems. It is also destroying massive eco-systems like Central Asia's Aral Sea, – the fourth largest inland sea 25 years ago, now a tenth of its former volume.





SWITCH TO..

Increasingly the industry is referring to all cotton produced under a variety of initiatives as 'sustainable'. However, the different initiatives and standards have different approaches.

FAIRTRADE CERTIFIED COTTON

For example, in a comparison done by the ITC Standards Map, Fairtrade comes out strongly ahead on requirements per standard, on requirements per sustainability area (social, environmental, management, quality and ethics) and on degree of obligation. Fairtrade-certified cotton guarantees farmers a fair price plus pays a premium for social development.

ORGANIC COTTON

Organic certified cotton has strict criteria for the use of pesticides and insecticides and farm management.

COTTON MADE IN AFRICA (CMIA)

Cotton made in Africa (CmiA) supports African smallholder cotton farmers to improve their cultivation and thus their yields.

BETTER COTTON INITIATIVE (BCI)

The Better Cotton Initiative (BCI) brings cotton supply chains together in partnership and support and trains farmers for farm improvements.

COTTON CONNECT (REEL)

Cotton Connect (REEL) helps brands develop cotton strategies and provides capacity-building on the ground for improved farming.

IF YOU USE

CELLULOSICS

Cellulosic fibres have been expanding in apparel over the past 20 years, primarily through growth in viscose (aka rayon). When cotton prices peaked in 2010/11, viscose gained market share as a cheaper alternative and has held onto it since.

Conventional viscose or rayon is made from cellulose from trees/plants that is processed with heavy chemicals like sodium hydroxide (caustic soda), carbon disulfide and sulphuric acid. If not handled safely, these can cause harm to those working with them. If not disposed of safely or re-used through a closed loop process, but dumped into local rivers, these chemicals can have serious negative environmental impacts.

A lack of transparency in most viscose production about the origin of the raw plant material means it is often impossible to know where the material comes from or to gauge the impact of harvesting it.





SWITCH TO..

TENCEL®

Tencel® and Modal® from the Austria-based company Lenzing are made via solvent spinning rather than conventional viscose methods. There is an almost complete recovery of the solvent. The water is also recycled. The by-products are key ingredients in the food and glass industry.

MODAL®

Tencel® is made from lyocell, a cellulose-based fibre extracted from eucalyptus grown on marginal land unsuitable for food crops; these trees are grown with a minimum of water, using sustainable forestry initiatives. The final fibres are biodegradable and can decompose in soil burial or in wastewater treatment plants. Modal® is extracted from beech wood grown on non-arable land.

S.CAFE®

Taiwan's Singtex manufactures sustainable yarn and fabrics from spent coffee grounds under the name S.Café®.

QMILK

Meanwhile QMilk is a fibre made from milk, developed in Germany. It produces a silky fabric and only takes two litres of water to make one kilogram of fibre.

IF YOU USE
WOOL

Wool now accounts for less than 2 per cent of fibre used for apparel but is still a valuable resource for some sectors, especially luxury.

Global wool production was in steady decline for many years but is beginning to plateau. Australia remains the world's largest wool producer for apparel.

Sheep farming raises animal welfare issues, such as breeding sheep with extremely heavy fleeces and mulesing (removing strips of wool-bearing skin from the sheep's breech (buttocks) to prevent flystrike).

Increasing demand for cashmere is linked to land degradation in Mongolia and China. Ever larger farmed herds of cashmere goats are damaging fragile grasslands through over-grazing and the impact of their hooves on the soil. Inner Mongolia is experiencing desertification, prompting increasingly severe and wide-reaching dust storms.





SWITCH TO..

RESPONSIBLE WOOL STANDARD

The Responsible Wool Standard was developed in association with industry to certify products that meet certain animal welfare and environmental standards. In response to the environmental issues with cashmere production, there is now a relatively newly formed body, the Sustainable Fibre Alliance, which is working with herders to develop a Sustainable Cashmere Standard.

CERTIFIED ORGANIC WOOL

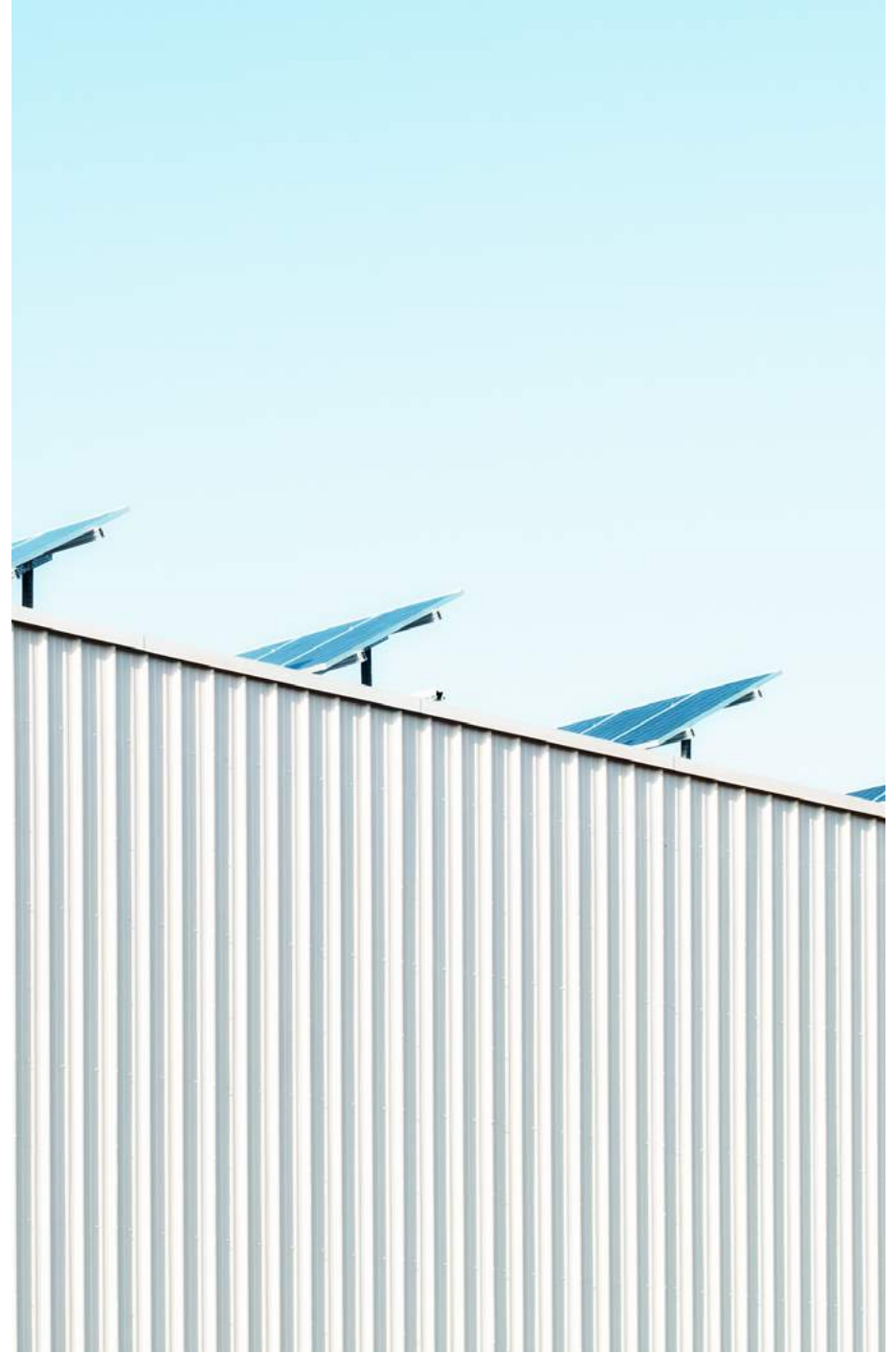
GLOBAL ORGANIC TEXTILE STANDARD (GOTS)

ORGANIC CONTENT STANDARDS (OCS)

YAK WOOL

Yak wool can be as soft as cashmere and is warmer than merino. As bovines, yaks' grazing habits cause less damage to fragile ecosystems than those of goats and sheep. **Tengri** is a London-based social enterprise run in partnership with Mongolian herders, paying them fairly for their fibres to create Tengri Noble Yarns. They also provide fabric woven by British mills. Khunu source from Tibetan yak herders in partnership with iYak and invest 2 per cent of revenue back to the communities they source from.

Stay ahead of the game and save money



Sustainability and corporate social responsibility are no longer a trend or a niche as far as business leaders are concerned.

According to PWC's 2016 Annual Global CEO Survey⁷ -

72%

of companies now report on both financial and non-financial matters.

81%

of CEOs think that in five years time, the most successful organisations in the sector will be doing this

76%

of CEOs say that business success in the 21st century will be defined by more than just financial profit.



Brand / Retail

Marks & Spencer's Plan A is its detailed plan to "source responsibly, reduce waste and help communities". The **financial benefit relating to Plan A activities in 2015/16 was £185m** – up 16 per cent from 2014/15.⁸

[Read more](#)



Supply / Manufacturing

Redbud Textile Company in China **saved nearly \$840,000** in the first year from a one-time investment of \$72,000 in reusing water and steam from its textile dyeing.⁹

[Read more](#)

FOOTNOTES

- 1 2015 NIELSEN GLOBAL CORPORATE SUSTAINABILITY REPORT, NIELSEN N.V. (2015)
- 2 NEILSEN GLOBAL SURVEY 2013-16; THE CAMBRIDGE GROUP (2016)
- 3 DO CONSUMERS CARE ABOUT ETHICAL RETAILING, MORGAN STANLEY (2016)
- 4 FOLLOW THE THREAD: THE NEED FOR SUPPLY CHAIN TRANSPARENCY IN THE GARMENT & FOOTWEAR INDUSTRY, CLEAN CLOTHES CAMPAIGN, HRW ETC AL, (2017)
- 5 WORLD APPAREL FIBER CONSUMPTION SURVEY, FAO & ICAC (2013), PCI WOOD MACKENSIE
- 6 IBID
- 7 2016 ANNUAL GLOBAL CEO SURVEY, PWC (2016)
- 8 [HTTP://PLANAREPORT.MARKSANDSPENCER.COM/M&S_PLANA_REPORT_2016_PERFORMANCE.PDF](http://PLANAREPORT.MARKSANDSPENCER.COM/M&S_PLANA_REPORT_2016_PERFORMANCE.PDF)
- 9 [HTTPS://WWW.NRDC.ORG/SITES/DEFAULT/FILES/REDBUD.PDF](https://WWW.NRDC.ORG/SITES/DEFAULT/FILES/REDBUD.PDF)

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