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INDUSTRY STANDARDS

Why brands need to rewrite the rule book

When higher consumption equals bigger profits, the balance between sustainable practices and traditional business models is becoming increasingly difficult for brands

Ana Santi

Sustainability is like teenage sex: everyone says they're doing it, but very few are actually doing it right. It has been ten years since American sustainability entrepreneur Joel Makower first coined this now-infamous phrase, but it makes regular comebacks, most recently at this year's *Drapers* Sustainable Fashion conference. The quote is always met with laughter, but its longevity reminds us of the fashion industry's glacial pace towards a solution for the havoc it wreaks on human rights and the environment.

In February, a UK parliamentary committee issued a reprimand for the way we make, use and throw away clothes. Around 300,000 tonnes of textiles, worth £140 million, is sent to landfill or incinerators every year. Textile production contributes more to climate change than international aviation and shipping combined.

"Fashion shouldn't cost the Earth, but it is on track to consume a quarter of our carbon budget by 2050. The industry has a responsibility to set out how it will be a net-zero carbon emitter," says Mary Creagh, chair of the Commons environmental audit select committee, which made recommendations to government. The verdict was clear: fashion had marked its own homework for too long.

"We absolutely support the work of the committee, but for positive systemic change to take place, the introduction of industry standards needs to tackle multiple elements of the supply chain and involve collaboration among all parties, including governments, brands, third-party experts, trade unions and NGOs," says Giorgia Waltier, sustainability manager for H&M UK and Ireland.

H&M aims to ensure 100 per cent of its materials are sustainably sourced by 2030; currently the figure is 57 per cent. By 2020, it pledges to increase its use of recycled or sustainably sourced cotton from 95 to 100 per cent. "We have joined the Swedish research group RISE in their project MinShed, which aims to find methods of designing clothes with minimised microfibre shedding," Ms Waltier adds. "On hm.com you can now see which factory every item we sell was produced in. Transparency drives positive change."

Yet for all this good work, H&M is part of the fast-fashion model, driving changing trends to make



and sell clothes at speed. When the single biggest thing a fashion consumer can do to help mitigate environmental damage is to buy fewer clothes, how does H&M rationalise its business model?

"Currently a large proportion of textiles cannot be recycled, so increased consumption is directly linked to an increase in waste," says Ms Waltier. "But we can close the gap between consumption and waste by transforming to a circular business model, whereby we only create products made using materials that can be recycled and regenerated, and by maximising existing resources."

However, retailers cannot continue to just make more "stuff", however sustainably made; they must also look for new revenue streams, including a service-driven model of repair and rental. "This will be the only way to achieve growth in

a sustainable way," says Rebecca Thomson, head of commercial content at *Drapers*. "The two – sustainability and growth – can absolutely co-exist, but there is upfront cost and businesses need to view it as a long-term investment to ensure they are keeping up with their consumers." In a recent report, the fashion trade magazine found that half of Generation Z shoppers had abandoned purchases because a retailer didn't match their sustainable values.

The Commons select committee called for a 1p charge per garment to be placed on retailers and producers to pay for better clothing collection and recycling. The MPs also called for the chancellor to use the tax system to shift the balance of incentives in favour of reuse, repair and recycling to support responsible companies.



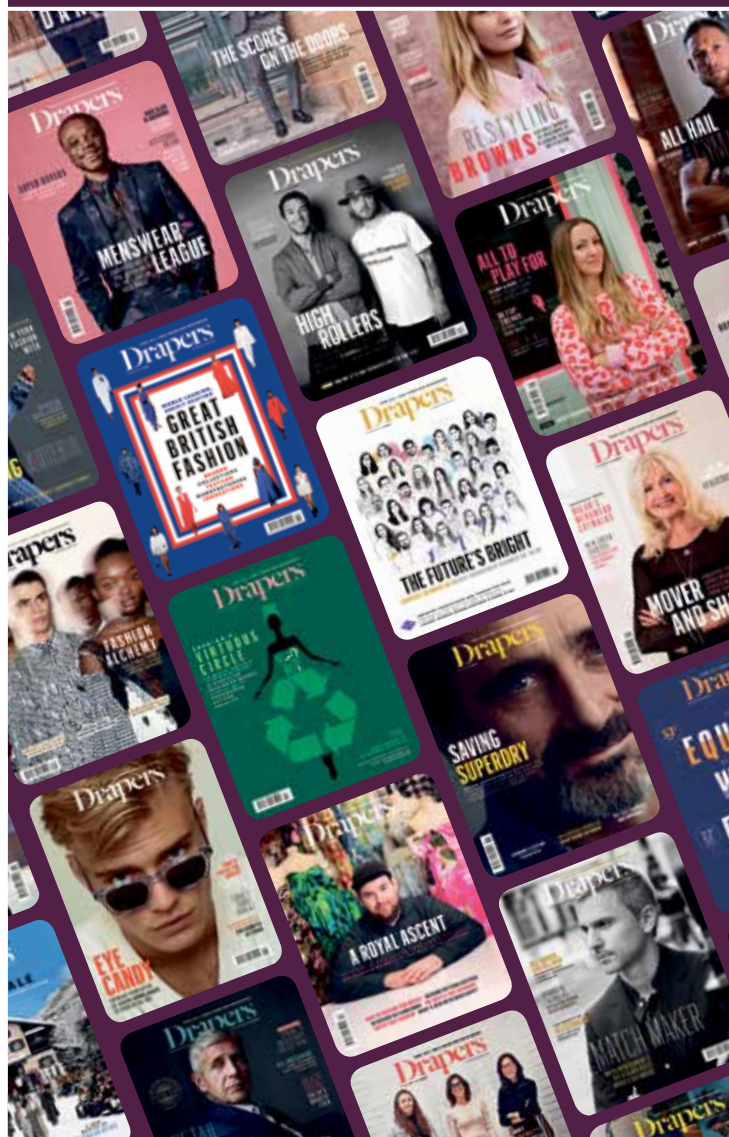
"Just 1p per garment?" questions Graeme Raeburn, performance director at fashion brand Raeburn. "Look what a 5p tax did for carrier bags. Be brave and apply this to textiles: a £10 per kilo deposit scheme – a pair of men's jeans weighs 250g – or a supplier credit system. Suppliers would be forced to design better-quality products, or more suitable for fibre-to-fibre recycling, if they knew consumers would bring them back at end of life to claim the deposit. In the same way we cultivated a voracious consumer market – aka fast fashion – in the UK, we can surely pioneer novel, creative alternatives."

Alongside industry standards and legislation, fashion must tackle the root causes of why we have reached such reckless levels of waste and consumption. Professor Dilys Williams, director of the Centre for Sustainable Fashion at the London College of Fashion, University of the Arts London, believes climate change should be part of school curriculums. "The whole system is broken," she says. "How can government incentivise businesses that emit high levels of CO₂? We need new ways of defining what business is. The current model undervalues nature and the underlying principles of humanity."

Professor Williams says businesses must ask themselves how they can create prosperity in four dimensions: nature, economy, society and environment. And she sees hope in young designers such as Bethany Williams and Sara Arnold, and Ms Arnold's clothing subscription and rental business Higher.Studio. "But you need to look at change across the system," says Professor Williams, crediting luxury group Kering for its introduction of an environmental profit-and-loss account. "It shows a horrific debt to nature, but it's a bold move and will become something that investors will look at."

To hope for a single industry standard in a market with a hugely complicated supply chain is unrealistic. But to dismiss any form of measure is lazy and irresponsible. A set of standards, backed by legislation, is a necessity. And it's exciting. "We have the heritage, best colleges, expertise and a market receptive to new experiences; we are primed to be global leaders in responsible, accountable fashion," Mr Raeburn concludes. "To ignore this opportunity is not only reckless, but terrible business sense." ●

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REINDUSTRIALISATION OF BRITAIN

Can and should manufacturing be brought home?

Brands have long relied on production overseas, where labour is cheaper and economies of scale have enabled strong growth. But post-Brexit, the reindustrialisation of Britain, for the textiles industry at least, could prove attractive

Olivia Gagan

Britain is a clothes-hungry nation: we buy more garments than any other country in Europe. Fast-fashion behemoth Primark operates more stores here than in any other country in the world and its biggest global outpost, an 161,000-square-foot giant, has just opened in Birmingham.

However, despite a voracious appetite for cheap clothes, the UK does not make large quantities of them. Primark's website lists just 17 UK factories from which the brand sources products. These are largely peripheral items to Primark's core bargain-clothing offer. The UK factories make chocolate, duvet covers and shampoo while, in contrast, it uses 505 factories in China.

Even businesses, where a made-in-Britain claim is integral to their brand identity, are reluctant to invest. Earlier this month news broke via *The Yorkshire Post* that

Burberry plans to sell land it had earmarked for a new £50-million manufacturing and weaving hub in Leeds.

Most clothing is manufactured thousands of miles away in Asian countries, according to a highly critical report this spring by the Commons environmental audit select committee. Yet the UK has a strong heritage of textile mills and clothing factories dating back to the 18th century, particularly in the northwest of England. So why do we not have a large-scale fashion manufacturing industry in the UK?

Dr Swati Dhingra, assistant professor at the London School of Economics, specialising in globalisation and industrial policy, says there's not enough trained staff to power it.

"Compared to other creative or tech-based industries, fashion manufacturing employs more people who are heterogenous, by gender, income and skillset, but there

are capacity constraints," she says.

Brexit raises questions of whether international workers will be willing and able to work in the UK, and developing talent within the UK could take years. As a result, organisations have been pushing for seamstresses to be able to enter the UK under skill-specific visas. And it is a skill. The production techniques required, particularly by high fashion and designer lines – hand-finished hems, silk-covered buttons – require detailed work. Burberry claims it can take a year to learn the sewing techniques to produce a trench coat, which requires more than 100 individual processes.

On Burberry's website, the ability to execute the 180 curved stitches required to make a perfect trench coat collar is a marketing technique, something to be proud of. Yet despite the prices such items can command – the firm's Kensington Heritage Trench Coat, which is made in Castleford, Yorkshire, retails at £1,490 – the attention to detail and creativity required aren't sufficiently valued by the UK government, Dr Dhingra says.

"There are complaints that the fashion manufacturing industry isn't perceived as being on a par with other creative industries, such as films and video gaming, which get significant tax breaks," she says.

But economically viable made-in-Britain brands are emerging. For example, Isabelle Waring founded womenswear brand Isabelle Fox in 2016. Inspired by

her grandmother’s work as a couture seamstress, her designs sit at mid-range price points, with a wool dress retailing at £225. From the outset, she has manufactured her clothes in the UK in two London factories which pay their staff the £10.55 London living wage.

Ms Waring says the benefits of choosing UK manufacturing include clear supply chain visibility; she visits the factories in person every week. As a startup, it is also far cheaper for her to travel to factories in the UK than in China. It also makes for short lead times. The Debbie dress from her current SS19 collection has been a hit with customers, selling out. Earlier this month, stock needed to be quickly replenished. From placing an order with her factories to having replenished rails of dresses was a two-week turnaround, she says.

But as her business scales up, Ms Waring has found there is a lack of UK factories capable of producing for growing fashion brands. “In London, there are micro-factories, where they’re making perhaps 150 units a week, and then much bigger factories producing 30,000 units in the same time,” she says. “For brands with a medium-sized scale of production, there’s less choice.”

Burberry’s abandoned factory plan was dubbed Project Artisan when it was in development. Dr Dhingra says instead of trying to lure fast-fashion retailers to UK factories, choosing to focus on the centuries-old artisanal skills deployed in higher-end fashion may be the most economically viable way to boost UK fashion manufacturing.

“Speaking as an economist, you should be investing in high

value-added fashion,” she says. That’s the brands and products which can generate the biggest margins. Besides high-end designer fashion, where margins are strong, this can also mean investing in startups where the inputs are typically far smaller than the revenues they can generate, says Dr Dhingra.

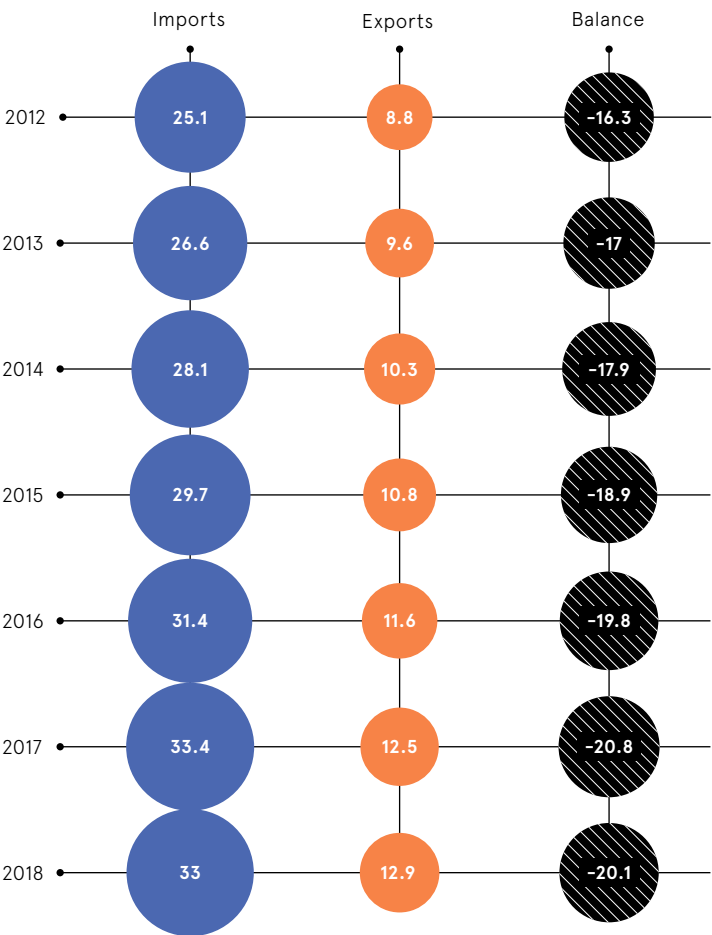
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We would have to double our prices because of the margin that is taken by wholesalers and retailers

But for startups, choosing UK factories can mean making business decisions which favour principles over profit margins. For example, Ms Waring says manufacturing in the UK wouldn’t be possible if she sold wholesale. “We would have to double our prices because of the margin that is taken by wholesalers and retailers,” she says, adding that she instead chooses to sell direct to consumers through her brand website.

Ms Waring says her decisions, from visiting factories weekly to paying a living wage, are a no-brainer for any fashion business that claims to operate with a conscience. She says: “I wouldn’t run a brand that involves slave labour or pays people so little money they can’t afford to live.” ●

TRADE BALANCE IN UK FASHION MANUFACTURING

Gross value added of textiles, wearing apparel and leather industry (£bn)



Office for National Statistics 2019



British fashion’s trade bible

The fashion industry reinvents itself constantly, and with this comes ever-evolving challenges and opportunities

Fashion reflects the moods and demands of every era, from the introduction of Sunday trading in 1994 – the same year Amazon launched, ushering in 24/7 shopping – to the British high street’s battle to retain relevance over the past decade, to today’s question of whether fashion can be a truly sustainable industry.

Fashion trade title Drapers has persisted throughout these changes as the leading resource for the fashion business, informing, representing and inspiring industry leaders and startups alike.

We began in 1887, covering the burgeoning women’s clothing trade. More than 130 years later, our news reporting, industry insight, awards and events form an indispensable toolkit for businesses operating at the forefront of the fashion industry. Our more than century-long heritage means we are trusted by readers and clients ranging from ASOS to H&M, YOOX Net-a-Porter Group to Marks & Spencer.

Looking back can be helpful, but what are the key challenges facing the fashion retail sector in 2019 and beyond? The message from industry leaders to Drapers is clear: sustainability has never been higher up the fashion agenda.

Sustainability is no longer an add-on, a nice-to-have or a marketing opportunity; it’s essential to running a fashion business profitably in 2019. Speaking at the Drapers Sustainable Fashion conference this spring, MP Mary Creagh, chair of the House of Commons Environmental Audit Committee, said sustainability is now “a fundamental requirement” for business.

Ms Creagh revealed that less than 1 per cent of clothing is currently recycled in the UK and the average piece of cloth-

ing is worn just seven times. Westminster is making moves to curb this, proposing tax breaks for fashion retailers that offer repairs and considering a one-penny producer responsibility charge on each item of clothing.

As a result of this growing pressure, we are witnessing retailers make fundamental shifts to their business practices to make sustainability a core part of their business model. This is happening across the industry, from global conglomerates to small independents.

Marie-Claire Daveu, chief sustainability officer of Kering, owner of luxury fashion houses Gucci, Saint Laurent and Balenciaga, told Drapers sustainability is about change management. “You have to

push people to think in a different way. If a company sees sustainability only as a regulation, or a constraint and a cost, that is not sustainability,” she says.

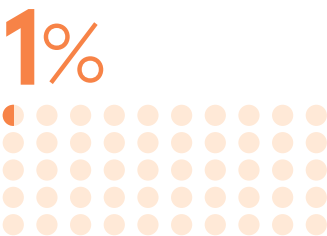
Kering’s billion-dollar business has enabled it to build free-to-use online courses on sustainable luxury fashion with the London College of Fashion; its first intake saw 10,000 students sign up. At the other end of the financial spectrum, small British womenswear label Birdsong is hiring pensioners and low-income migrant women, and paying them above the London living wage to produce its clothes.

As the British fashion industry’s trade bible, we are used to talking business. But consumers are also leading this change. On the high street and when spending online, a shift in mindset is happening. Data gathered in our *Connected Consumer: Multichannel Insight Report* reveals just over a fifth of all shoppers (21 per cent) now say a brand’s sustainability record is likely to influence whether they buy or not.

Sustainable practices are becoming habitual with consumers. From abandoning carrier bags to the rise of the #30Wears movement on Instagram, sustainability is gaining momentum, whether brands choose to align themselves with it or not.

Brands that fail to adequately account for their sustainability practices risk, at the very least, looking outdated. At worst they risk a significant hit to their bottom line through poor sales, low staff retention and negative press.

But sustainability is just one of the issues the Drapers team of journalists are reporting on and investigating every day. From riding out Brexit headwinds, to isolating the most useful digital innovations, to building company cultures which attract the best talent, to maximising productivity, we support and connect the sector’s leaders, and provide ideas and solutions to help drive the fashion business forwards.



share of clothing that’s currently recycled in the UK



of UK shoppers say sustainability influences their likelihood to buy from a brand

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INTERVIEW

Brands must speak out to change the world

Oliver Balch

No animal is so stupid or greedy as to foul its own nest, except the human animal. So declares Yvon Chouinard, 80-year-old founder of Patagonia, the US outdoor apparel brand and much-heralded paragon of sustainable fashion.

The comment appears in his new book *Some Stories: Lessons from the Edge of Business and Sport*. Its 464 pages are a testament to a life lived in nature. As a young man in northern California, he helped open up some of Yosemite's most iconic climbs. These days he is more likely to be found in his waders casting a fly.

Chouinard may have a dim view of the impact of the human species on our planet, but he is no misanthrope. He is amiable, down to earth and, if the mood takes him, something of a raconteur.

What he certainly is not, however, is a man who minces his words. Take his attitude towards consumers. Despite owning a global fashion brand, he likes to cite the dictionary definition of a consumer as "someone who eats up, destroys".

But it doesn't have to be that way. As he says, the strongest word in the English language is "no". "Brands can come up with whatever product they want and advertise the s**t out of it and we can just say 'no'. That's pretty strong," he says.

The comment is revealing in two respects. Firstly, his use of "we". Chouinard isn't some distant business mogul, far removed from the men and women who buy his firm's

products. He feels a kinship with his customers. It's a kinship borne out, in large part, of a shared and enduring love of adventure and wild places.

Secondly, the comment shows him to be a man of principle. If he feels something isn't right, he will call it out, even if it threatens to hit Patagonia's profits at the till.

“

If you can create a company of honest messaging and truth, your customers will look to you for what's right

Most famously, in 2011, Chouinard signed off on a one-page ad in *The New York Times* – as a rule Patagonia doesn't go in for paid advertisements – that read: Don't Buy This Jacket. The ad, which was designed to highlight the environmental impacts of superfluous spending, ran on Black Friday, the busiest online shopping day in the US calendar.

As he explains in an earlier book *The Responsible Company*, the logic behind the campaign was simple: "If you want to reduce the environmental

and social harm you do, the injunction to reduce comes first. Don't make what won't be useful or won't last. Don't buy what you don't need."

This same spirit of principles-led business manifested itself more recently in Patagonia's decision to sue the President Donald Trump administration. Appalled by the US president's decision to roll back federal protections for conservation areas, known as national monuments, in Utah, Chouinard agreed to throw the company's weight behind a lawsuit initiated by native American and environmental groups.

Not every business leader has such a disruptive, anti-establishment nature. After all, this is the man who compares entrepreneurs like himself to juvenile delinquents: "You know, the juvenile delinquent says, 'This sucks. I'm gonna do it my own way.'"

And, even if they did share his rebellious streak, few executives have the same freedom to act. If speaking out on a controversial topic dents profits, so be it. As sole owner, Chouinard can do as he pleases. Managers in public-owned companies, in contrast, have shareholders to answer to.

He isn't blind to the conundrum that professional corporate leaders face. He cites the example of Danone. Under the leadership of chief executive Emmanuel Faber, the French food giant that recently achieved the ethical B Corp certification. Even so, he predicts Mr Faber's hands will be tied.

"The guy running Danone is a climber, a serious climber and a really

Renowned environmentalist and billionaire clothing entrepreneur **Yvon Chouinard** says brands must show honesty and transparency in their efforts to be sustainable, and demonstrate responsibility to save the planet

Yvon at the Tin Shed in California, where he started making his own climbing hardware

good guy, and he really, really wants to make Danone a responsible company,” he says. “But his stockholders, his board of directors just stop it.”

Viewing eco-activism as a drag on profits is totally wrong headed, Chouinard argues. After all, for 46 years, Patagonia has been sounding off on everything from climate change to ocean waste. And, through that time, sales revenues at the upstart brand have crept ever upwards.

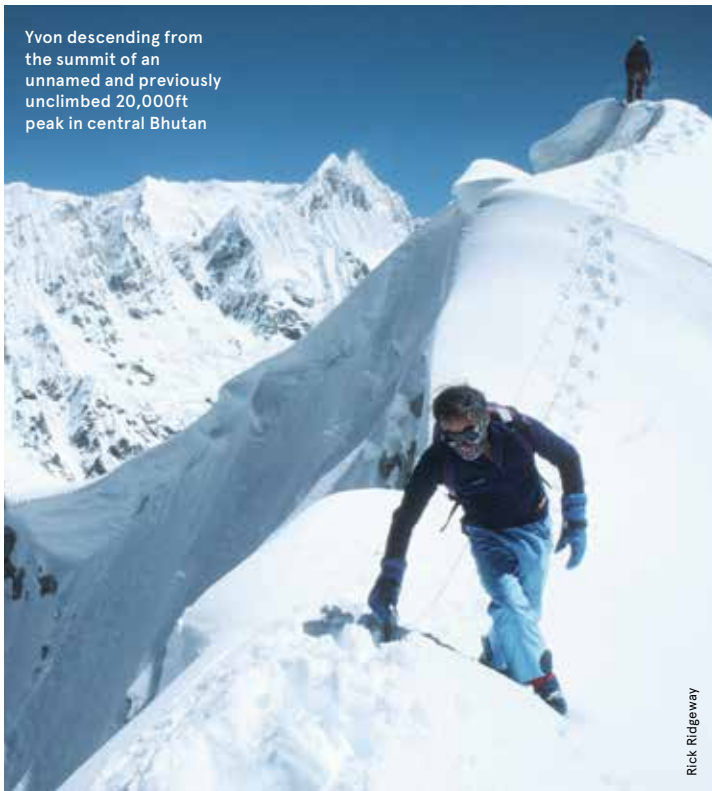
Proof again comes in the shape of the brand’s bold Black Friday advertisement. Compared with the previous year, Patagonia’s US stores clocked a fourfold upturn in till receipts, an outcome that Chouinard swears he did not anticipate or intend.

So what, if anything, can other fashion brands learn from Patagonia’s maverick founder when it comes to brand activism?

Three lessons, at least. Firstly, get yourself a credible narrative. Chouinard’s view of the world – in a nutshell, wild is good and rampant consumerism bad – may not be to everyone’s taste, but at least it is ethically consistent and intellectually defensible. Moreover, as the impacts of unsustainable use of resources become evermore apparent, it is a narrative that chimes with an increasing proportion of the buying public.

Secondly, don’t sugarcoat your message. Be bold. If you believe it, say it. Consumers are “really hungry” for their favourite brands to take a stance on issues of public concern, says Chouinard.

Thirdly, be true to your message in what you do, not just what you say. It is difficult to fault Patagonia here.



Yvon descending from the summit of an unnamed and previously unclimbed 20,000ft peak in central Bhutan

Rick Ridgeway

Under Chouinard’s leadership, the brand has switched to 100 per cent organic cotton, given millions of dollars to environmental causes, and led the way on childcare provision for employees and fair wages for overseas factory workers.

Nor is it just the company’s own house that it has occupied itself with. In 2011, it helped found the cross-sector Sustainable Apparel Coalition which, among other activities, has helped develop a widely used standard for measuring the sustainability of footwear and clothing products.

Arguably, the most important lesson Chouinard has to share is that being true to your message does not equate to being perfect in all you do.

Nothing stymies brands more when it comes to speaking out than a fear they will be branded hypocrites. Chouinard’s response is simple: fess up. Consumers don’t expect brands to be absolutely flawless. Honest, yes. Perfect, no.

This has been Chouinard’s line all along. Where problems have come to light, as with the chemical pollution associated with conventional cotton

THREE LESSONS FROM YVON CHOUINARD	
1	Get yourself a credible narrative
2	Don’t sugar coat your message. Be bold. If you believe it, say it
3	Be true to your message in what you do, not just what you say

farming, for instance, the brand has sought to take remedial action.

Where technological or economic limitations make remediation difficult, it commits to continue working on the issue until an adequate solution can be found. A good example is wool production which, due to sheep’s grazing habits, has a major, destructive effect on local biodiversity. Patagonia has made some advances, but not enough.

But as Chouinard unashamedly says, there is no such thing as the 100 per cent sustainable company: “We can try to do good, but it [perfect sustainability] is against the laws of thermodynamics; everything costs something.”

Nor is he simply speaking generically. With characteristic candour, he turns the focus on Patagonia itself. He says: “I look at my company; it’s causing an incredible amount of harm with all the resources we’re using. So we have a responsibility to do something now.”

It’s a smart message. Why? Because it tells consumers what they instinctively already know. Of course, brands must still strive to become more sustainable. Yet, when a brand’s cards are laid out so plainly, such frankness gives them the licence to step up and speak out.

“If you can create a company of honest messaging and truth, your customers will look to you for what’s right,” he says.

They are certainly doing so in the case of Patagonia. In recent years, the fledgling brand has exploded to become a high-street name with sales revenues topping \$1 billion.

So if, as Chouinard claims, customers are looking to outspoken brands for guidance, what single message does he have to share? For someone who has, despite his best efforts, seen the gradual deterioration of our natural world, his response is remarkably upbeat.

“If we acted responsibly worldwide right now, we could really solve a lot of problems,” he says. “But it has to be done worldwide and now.” ●

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SUPPLY CHAINS

Fashion supply chains in need of tech makeover

Digital technologies could transform supply-chain visibility and transparency in fashion, but a culture of resistance is holding the industry back

Alexandra Leonards

Not yet falling apart at the seams, but certainly unravelling, fashion is revealing itself as a fragmented and fickle industry. Twenty years ago, the Western world still relied on domestic manufacturing, nowadays the industry depends on labour from much further afield. Driven by changing consumer demands, a need to cut costs, a move away from homegrown textiles and a shift towards fast fashion, the fashion supply chain has waned under the pressure of its growing complexity.

The level of efficiency in the fashion supply chain has not kept up

with its developing intricacy, and the disconnect between sourcing raw materials, manufacturers and retailers has generated serious concerns about the industry's impact on wastage, climate change, poor pay and forced labour. Digital technologies have the capacity to boost efficiency and bridge the gap between suppliers and brands, but a culture of resistance is restricting the industry.

"Some companies are better than others, without question," says Shaun Godfrey, chief operating officer of freight-forwarding for Xpediator, which provides fashion logistics services for retailers,

brands and manufacturers. "The ones that do it best, and we see evidence of their success from their financial accounts, are those that start with the consumer and work their way back in a controlled way through the supply chain; this is very much built around a strong and standardised IT system."

Digital technologies designed to track and trace products from the raw-material source to the customer can deliver full visibility of the supply chain. The key is to maintain a consistent format of data for all suppliers and elements of the chain. The data can then be interfaced with digital technologies such as blockchain, a shared database where various parties in the supply chain input and verify information.

However, creating a holistic system like this can be a daunting task, especially for larger fashion companies with complex supply chains.

Some suppliers or manufacturers in developing countries might not even have the systems in place to store the data required.

Current growth in the marketplace is dominated by smaller companies that are developing on the back of very strong digital platforms and technologies, notably artificial intelligence, the cloud and blockchain. Teemill, a cloud-based platform that lets anyone build an online fashion store and sell T-shirt designs online, is an example of a startup that is fully embracing technology in its supply chain.

"The design of the industry itself is outdated," says Martin Drake-Knight, design engineer at Teemill, which prints and ships items for anyone with a smartphone. "For us it's about viewing the supply chain as part of a connected system and looking for positive solutions across the product life cycle, from where clothing comes from through to where it goes after it's worn out."

The company uses technology to design waste out of the supply chain. "Mindful application of tech can create efficiencies that we reinvest in better materials, renewable energy and solving the issues in fashion," explains Mr Drake-Knight. "It's about the conscientious application of technology, not just technology on its own."

But many fashion brands are still hesitant to implement pioneering digital technologies because they can be expensive, involve sharing sensitive data and often require extensive training.

Clothes manufacturing is vastly driven by the cost of labour, with many brands seeking out the cheapest route. In this industry you get just what you pay for, and cheap labour comes with a risk of exploitation and back-office costs.

Alternative manufacturing facilities could save money in the long term, but are often disregarded because of their initial cost. However, there's an opportunity for brands to use digital technologies to identify all the costs associated with the production cycle, including wastage and back-office costs, which are often missed. Businesses might find that choosing a different manufacturing plant improves the efficiency of the whole supply chain

and savings associated with this could far outweigh the benefits of low-cost labour.

"Digital technologies can enable a reshoring of UK fashion manufacturing, able to compete on a global scale, if the research is done coherently and properly funded," says Susan Postlethwaite, senior teaching fellow in fashion at the Royal College of Art (RCA) and co-investigator of Future Fashion Factory, aimed at improving the fashion supply chain. But there are a large number of stakeholders and policymakers who need to be involved to make it a success.

"The buy and sell side all want originality," says Tessa Laws, chairman of Bagir Group, which manufactures tailored garments for retailers including H&M and Brooks Brothers. The standardisation of fashion is a worry for the industry, and some argue that current digital systems take away from the potential for innovation and unique design.

But instead of hiding away from technology, the industry should be taking charge of it. The RCA wants to train the next fashion generation to embrace new technologies, understand the science and engineering for new production methods and recognise the potential to innovate in the designing of new systems and processes.

Fashion is desperate for a technology makeover and, unless the industry embraces innovation with open arms, its growing supply chain is likely to suffer. If the wider industry looked at smaller niche businesses that view fashion with fresh eyes and new perspectives, they might be inspired to transform their own supply chains.

50%

of large global companies will be using artificial intelligence, advanced analytics and the internet of things in supply chain operations by 2023

Gartner 2018

“

It's about the conscientious application of technology, not just technology on its own

Depop's making fashion fun again

A peer-to-peer social shopping app is where the world's creatives come to buy, sell and discover inspiring and unique fashion

Out of all of the top creators on Depop, some of whom make six figures curating, designing and selling clothing on the platform, you have probably never heard of 99 per cent of them. And that might be generous.

Yet these young creative individuals will broaden, evolve, redefine, democratise and genuinely transform what we value in fashion forever.

Most importantly, they're having a lot of fun doing it.

DE-WHAT?

Depop is a marketplace and creative platform where people can meet, connect with and shop from one another. We started as an app, but now manage physical stores and pop-up experiences across the UK and America. We have more than 13 million users and 90 per cent are under 26, which means a lot of them are part of Generation Z.

By 2020, Gen Z – generally defined as those born between the mid-1990s and mid-2000s – will be the largest group of consumers, commanding up to \$143 billion in spending power as they enter the workforce. They live, work and shop in profoundly different ways to the generations before them.

Our mantra is "Empower young people to transform fashion" and that's truly what we intend to do. Empower how, you ask? By galvanising our young creators to tackle these three big components, which the fashion industry is largely missing out on:

13m+
users

90%
under 26 years old

800k
sellers

200m
messages exchanged on Depop in 2018

authentic community, celebration of entrepreneurship and a drive towards sustainability.

COMMUNITY

The top 1 per cent of the fashion industry has forever called the shots. The brands, trends and models that executives want you to consider have been placed front and centre. This has happened at the expense of greater diversity and choice.

Not anymore. Supreme is valued at \$1 billion, Gucci is emblazoning New York Yankees logos on everything alongside Dapper Dan and brands like Heron Preston and 1017 Alyx 9SM are fixtures of Paris Fashion Week. It seems like the kids have taken over.

Yet influence still almost always trickles from the top down. Depop utilises the power of a globally-connected world to change that. If we've learnt anything from how the internet has transformed other industries, we've learnt that old top-down power structures are not long for this world. As we grow our community, we make it a point to help the many perspectives within it prosper.

Depop sellers are often ahead of trend, eschew labels and love flaunting their unique perspectives. Take Internet Girl (pictured), for example. The Canadian national started flipping vintage pieces on Depop a few years ago and has built an audience of more than half a million followers ever since. Her aesthetic, heavy on 1990s "mall rat" style, has developed a rabid following of young creatives who are heavy on irony and nostalgia.

Internet Girl engages with this community constantly, both through Depop and the YouTube content she creates weekly. She has earned enough to move to Los Angeles and start her own brand, at the same time as continuing to offer uniquely selected vintage pieces to her audience.

ENTREPRENEURSHIP

When news broke that Rihanna's Fenty-LVMH deal was really happening, the world rejoiced to see a woman of colour at the helm of a major luxury label. It's indeed a historic moment, yet the conglomerate's first new maison since 1987 is still an example of the industry placing a bet on someone who is not an up-and-comer, but already has huge celebrity.

In many ways, the same is true of Louis Vuitton hiring Virgil Abloh, who spearheaded Off-White with Instagram-friendly branding, a significant network of cool-kid collaborators

“

Depop sellers are often ahead of trend, eschew labels and love flaunting their unique perspectives



and DJ gigs all over the world to grow. These two represent a huge stride forward for the luxury industry, yet bootstrap entrepreneurs they are not.

Depop caters to the many kinds of young entrepreneurs who are transforming fashion on their own terms. Our platform makes it easy to be found and to build an audience. We help our sellers build businesses with dedicated advice and support, data and analytics, mentoring and workshops.

We're an open, inclusive place – and success is meritocratic and built on relationships. 200 million messages were exchanged on Depop in 2018 alone, and many of those led not only to new friendships and IRL

interactions, but also to lucrative collaborations and partnerships between sellers. This community translates into the real world with events in our NYC and LA retail spaces, which rotate programming on a monthly basis to highlight those who go above and beyond to build their own personal brands on Depop and to help expose their work to broader audiences. We like to say that Depop can help you build an empire from your bedroom, and our top sellers are doing exactly that.

SUSTAINABILITY

The fashion industry knows it has a sustainability problem. Creating clothing at scale, over and over again, is bad for the planet and it's not what people want. A worrying 2019 report from the World Resources Institute found that around one rubbish truck of clothes is burnt or sent to landfills every second and the average consumer bought 60 per cent more clothes in 2014 than in 2000, but kept each garment for half as long.

If millennials have blazed the trail towards a more sustainable world, then Gen Z are the galvanising force that will pressure major brands around the globe to embrace environmentally

friendly business strategies as must-haves. According to Nielsen, for example, almost three quarters of 15 to 20 year olds would pay more for a sustainable product.

Vintage, upcycled and resold garments make up a majority of Depop's inventory. Simply put, very little sold on the platform is brand new. Vintage is more unique, covetable and collectible than new clothing. Plus, handmade embellishments and the brilliant creativity of designers such as Nicole McLaughlin, with whom we just hosted an Earth Day campaign in the United States, make for compelling fashion product.

At Depop, we're continually exploring new ways to support this new generation of talent, so they can transform fashion, build successful businesses, connect with and inspire the communities around them, and have a very good time doing it.

For more information please visit depop.com

depop

BRAND VALUE

Nike continues to be the world's most valuable apparel brand, according to Brand Finance, after impressive growth over recent years and an enviable following on social media. But which brands are challenging its position?

HOTTEST BRANDS OF 2019

The Lyst Index analyses the online fashion shopping behaviour of more than five million shoppers a month across 12,000 designers and stores online, and includes Google search data, online sales and social media activity

BRAND VALUE OF THE LEADING TEN APPAREL BRANDS IN 2019*

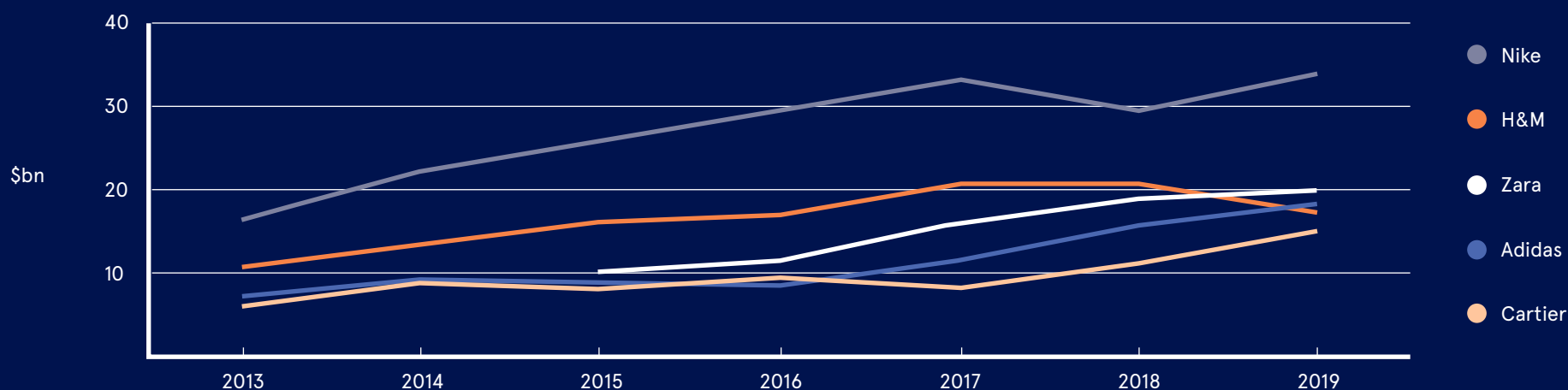
Brand value and percentage change on 2018



Brand Finance 2019

BRAND VALUE OVER TIME*

Changes in brand value for the top five most valuable brands in 2019



Brand Finance 2019

Rank Q1 2019		Rank Q4 2018	Rank Q1 2019		Rank Q4 2018
1	Off-White	2	6	Prada	11
2	Gucci	1	7	Stone Island	7
3	Balenciaga	3	8	Versace	6
4	Valentino	9	9	Vetements	8
5	Fendi	5	10	Saint Laurents	27

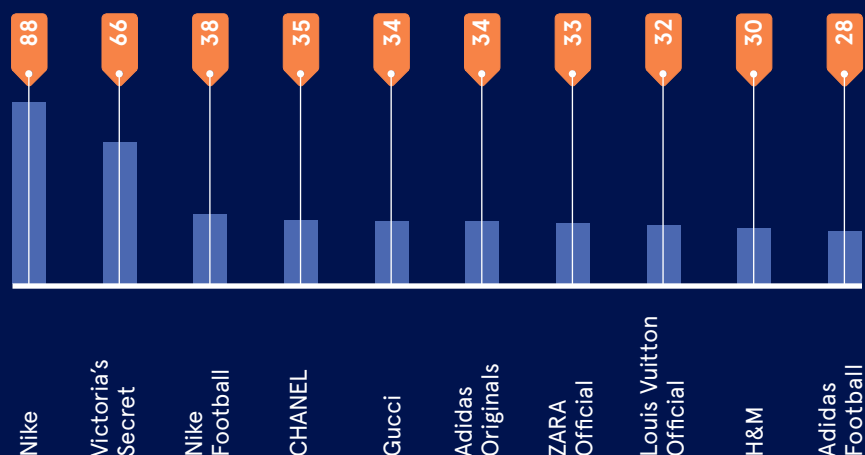
Lyst 2019

*Brand Finance's measure of brand value accounts for brand strength (which includes marketing investment, stakeholder equity and business performance), brand revenues and royalty rates (licensing agreements)



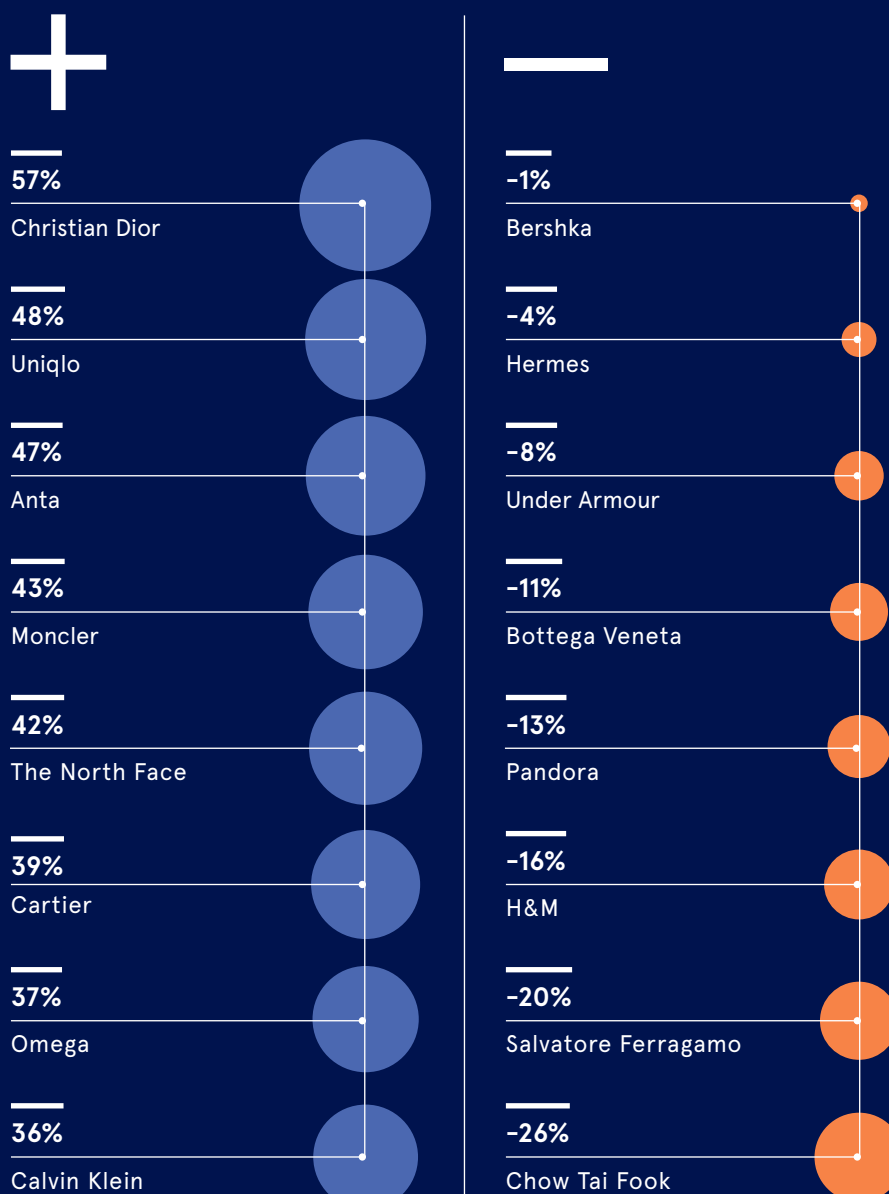
MOST FOLLOWED FASHION BRANDS ON INSTAGRAM

Number of followers in mid-May 2019 (million)



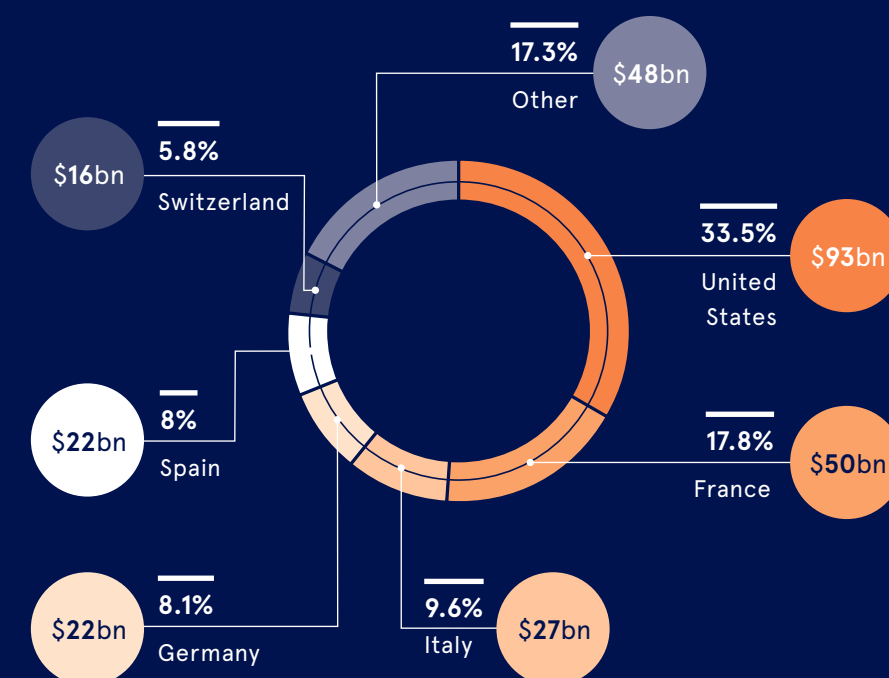
Instagram 2019

BRAND VALUE: BIGGEST MOVERS IN 2019*



Brand Finance 2019

WHERE THE 50 BIGGEST APPAREL BRANDS LIVE*



Brand Finance 2019

RETURNS

Making returns profitable is getting harder to master

Free returns are loved by consumers, but also abused by a minority. So should retailers call time on easy returns and what effect would it have on the industry?

Charles Orton-Jones

Buy, try and return if you don't like. It's the modern way to shop online. But retailer Asos is tightening its rules.

In April, Asos said it would clamp down on customers who order and return "way, way more than even the most loyal Asos customer would order". These malefactors will be banned. Also getting the red card are customers who "wardrobe" or wear clothes once and then return them.

Asos's move has triggered an industry conversation over returns. Is the industry too generous with returns? Who should pay for postage, the vendor or buyer? And what should be done about the cheeky 2 per cent who abuse the rules?

A lot of research is being done to find the answer. First up, the data

shows how important returns are to consumers.

A survey conducted by Klarna, a credit service, of 2,000 UK shoppers found 78 per cent would buy more in the long run from retailers with free returns. Three quarters said returns are a key part of how they select a retailer and 86 per cent say free returns will make them more loyal.

The testimony of retailers supports these numbers. For example, Andrew Davies, head of e-commerce at Weird Fish, a mid-sized clothing brand with 16 stores, says the quibbles are minor compared to the upsides. "The returns process and experience is just as important as the payment process," he says. "As long as you are offering a positive experience and the process is

efficient, then the long-term value of any customer can absorb the costs of any returned item."

And there is a legal minimum to observe. The Consumer Rights Act imposes a statutory 30 days. Robert Lands is partner at Howard Kennedy, a London law firm, who explains: "The Consumer Rights Act 2015 relates to faulty goods and goods which are not as described, but the rules on which online shoppers rely when they've just changed their mind are in the Consumer Contract Regulations 2013. These are more generous than many realise. Some believe that consumers have 14 days to change their mind and return, but in fact you can take 14 days to inform the retailer of your intention to return and then a further 14 days to do so."

That's the minimum. Retailers can offer more. And, in line with consumer demand, the trend is to offer longer windows. Research by Kurt Salmon, part of Accenture Strategy, shows the timeframe for full refunds is growing, with 57 per cent offering 15 to 31 days and an additional 19 per cent allowing up to 90 days.

However, retailers are finding that extending the returns windows comes with dangers. Returned goods may be harder to sell again, as the seasons change. And goods may be damaged if held for longer.

Retailer Jules B offers only the basic 14-day window for these reasons. Bethany Hamer, the online fashion editor at Jules B, explains:



“By banning the minority who take advantage, better conditions can be offered for the rest of the consumer base

"This shorter timeframe cuts down the risk of items being returned damaged, faulty or with missing tags and allows us to get things processed more quickly and get products back online. We don't have the stock levels that larger online retailers do, so it's important to us that we get items back into our stock as quickly as possible."

There's also the question of who pays. Data from parcelLab, looking at the UK's largest 100 retailers, says only a fifth provide a returns label with deliveries. The rest expect the consumer to sort out the return themselves, although 16 per cent offer an online label download service. This is not always postage paid. The average cost of postage is £8.42. And communication with customers is not great as a quarter do not notify consumers when their return has been received and a third fail to say when the reimbursement will be processed. This suggests a lot of work can be done on the experiential side of returns.

All this seems to show that returns are popular, profitable and in line with consumer expectations. The challenge is how to deal with the tiny number of consumers who abuse the returns rule. Recent research from Barclaycard suggests this is the biggest annoyance for retailers. A quarter have seen returns increase in the last two years. And one in five report redrafting their returns rules to be more stringent to counter vexatious returns, with a further 19 per cent planning to do so in the next year. The concerns cited by retailers are over-ordering and wardrobing.

In summary, the industry is learning how to master returns. Longer windows than the legal minimum are appreciated by consumers. And free returns are a boon. But serial abusers undermine the entire system.

By banning the minority who take advantage, better conditions can be offered for the rest of the consumer base.

For example, Asos has taken action against consumers who order too much or wear clothes and then return them, but it also improved the offering by extending the window for free returns to 45 days, with a voucher for anything received after 28 days.

In a nutshell, the golden age is here to stay. Apart for that naughty minority. The rest of us can bid good riddance to them. ●

CONSUMER EXPECTATIONS ARE SKY HIGH

Percentage of 2,000 UK consumers who agree with the following



Klarna 2019

RACONTEUR
AGENCY

agency@raconteur.net

Need more leads, brand awareness and thought leadership?

Get in touch to find out how we can support your marketing efforts and improve ROI

OPINION

‘Businesses have greater opportunities to engage in meaningful conversations that will lead to conscious consumerism’

Fashion, at its best, acts as a mirror of our time; it’s always pushed boundaries and I believe nowhere is this more prevalent than in London. The capital has a long-standing reputation for attracting creativity, championing freedom of speech, and plays a key role in innovating and initiating cultural change which resonates across the global fashion industry.

All businesses need to focus on purpose, action and positive change. The fashion industry is no exception and works at an incredible pace; businesses have to be reactive, delivering product in step with consumer demand and investor pressure, while also embracing a more sustainable future.

The government has declared a climate emergency and the fashion industry, alongside all others, must take action. But it’s a positive change that has to come from brands and businesses, driving innovation and new ways of working, while also collectively shifting consumer habits. This isn’t about compromising, it’s redressing the balance of craft and consumerism.

In the UK, the fashion industry employs around 890,000 people, contributes £32 billion to the economy, which is similar in size to telecoms or car manufacturing. But like the bold designs on the catwalk, it’s more debated than either of these sectors because its voice is much louder. It’s within our cultural and social dialogue and consciousness, so businesses have greater opportunities to engage in meaningful conversations that will lead to conscious consumerism.

The British Fashion Council (BFC) is a not-for-profit organisation whose mission is to harness the collective power of the fashion industry to enable sustainable growth. Now is the time to ensure we do this. We have established a Positive Fashion committee of sustainable and communications experts to help focus our engagement and adoption of sustainable and ethical practices, creating a significant network to embrace and promote this movement of change.

Supporting sustainable growth has meant creating global platforms, such as London Fashion Week and The Fashion Awards, to showcase UK businesses to global audiences, and helps create strong

and long-lasting partnerships with business and creative networks in key markets overseas. Now we are engaging this global network, enabling knowledge-sharing between large businesses and luxury groups with small and medium-sized enterprises to ensure businesses can continue to grow, but also easily switch to more sustainable practices.

The BFC established Positive Fashion in 2014, a stream of work that would enhance our strategic pillars of education, business and reputation. Since then Positive Fashion has championed more accessible local high-end manufacturing, Vivienne Westwood’s SWITCH to green energy campaign, and is focusing on the creation of practical guides and toolkits to enable us to create a programme to help the industry become net carbon neutral.

The good news is that significant work is already being done by many of the large responsible businesses. Kering Group have been identified as luxury leaders, while Marks & Spencer were first to focus on the environment on the high street; both have representatives on the BFC Positive Fashion committee. The designer fashion businesses, starting today, are doing so through a sense of purpose and with an intent to be sustainable.

This is a direct reflection of our graduating generation’s view of the world and the role they want to play as creatives in the future of our global industry. This is something we should all support. Our aim is to create momentum for change, yet still champion the incredible creativity, craftsmanship and ingenuity that comes from inspirational and original design. ●



Caroline Rush
Chief executive
British Fashion Council

500+
virtual samples created in weeks



Test new trend concepts on social media in minutes

Forecast customer demand using photorealistic digital samples

63% reduction in physical sampling

60% reduction in physical fit model sessions

28% increase in productivity

Why 3D?

- ◆ Create and present product ranges digitally
- ◆ Make style amendments and accurate decisions in real time
- ◆ Enhance supply chain collaboration
- ◆ Reduce lead times
- ◆ Improve sales and reduce returns

When 3D tech is a perfect fit for fashion

Digital 3D tools can transform the fashion industry, boosting productivity, product development and profitability

Anticipating consumers’ needs is the cornerstone of any fashion retail business. But consumers have more needs than ever and want them met faster than ever. Fashion houses no longer have the luxury of time; their products have to migrate from page to rail as quickly as possible.

Add in consumers’ desire for more product lines, leading to costly smaller batches, and it’s easy to see why the industry is under pressure; brands are consolidating or simply disappearing from the high street.

But now digital technology is helping overcome these problems, with resultant effects on profitability and sustainability throughout the fashion industry. 2D and 3D visualisations can bring garments to life, enabling companies to save up to 60 per cent in the cost of physical fitting sessions, and 28 per cent in time to approval.

Speed of approval is an important factor in an increasingly fast-paced world, where “see now, buy now” is the consumer mantra; trends can come and go overnight, and any delays in the supply chain can mean the difference between riding the wave or a wipe out. Technology can cut lead times for product from weeks to only days.

The technology behind these tools has been available for a decade or so, but it is only recently that companies have started to embrace and implement it. 2D and 3D offer an end-to-end development solution, connecting everyone from the designer to the buyer in one seamless process.

A 3D visualisation of a product can be sent around the world in seconds. The garment can also be transferred direct to fabric, through the clever use of on-

demand printing, while micro-factories, where textiles can be digitally printed and automatically cut, are a key driver for success. No longer is it necessary to ship fabric around the world chasing cheap labour; a garment can be brought to life in small batches via print machinery in the next room.

Such micro-factories not only get clothes on to racks in a matter of days rather than months, but can also bring a new level of localism to the fashion industry and help address issues of sustainability; the creation of physical samples that go to waste costs the apparel market a massive \$6 billion to \$8 billion every year.

No longer are teams working in silos, with all the opportunities for miscommunication that arise. Instead, teams are able to work more efficiently, creating more styles with the same resource. Different avatars mean the product can be “seen” on differently shaped bodies and adjustments made in seconds. Lan-

guage becomes less of a barrier when the concept can be visualised in 3D on screens across the world.

Design concepts can be tested on social media before being put into production. Different colour options can be tried out in the blink of an eye and at no extra cost, and the result sent direct to the micro-factory at the press of a button.

Whole collections can be reviewed digitally by buyers, with different options assessed in hours rather than weeks. A garment worn by a fashion influencer one day can be on the screen the next.

The rise in the use of technology demands a changed skillset within the industry. Of course, designers who create their best work using paper and pen will continue to do so, but the right use of digital technology can be added to refine and improve the overall process from concept to high street. Now colleges and universities are starting to offer 3D fashion courses, the industry is set to see a revolution in its skills that will increase efficiency.

The global textile industry has for too long been stuck, continuing to use methods of production that would be recognised by manufacturers from the 19th century. Applying digital 3D tools can transform the process, increasing productivity and creating a lean product development chain that can cut overheads and improve profitability.

“Applying digital 2D/3D tools can transform the process, increasing productivity and creating a lean product development chain that can cut overheads and improve profitability”

For more information please visit www.optitex.com or contact elizabeth.brandwood@efi.com

efi | **OPTITEX**

ISKO denim, fabric fit for the conscious generation

A responsible enterprise, with sustainability at the top of its business agenda, appeals to an environmentally conscious customer

The planet is in the news. With climate breakdown making the wrong kind of headlines, environmental awareness and activism is on the up, and young people are taking to the streets.

They are also exercising spending power at the retail checkout, says Rosey Cortazzi, global marketing director at ISKO, the largest denim manufacturer under one roof in the world. "Customers, especially Gen Y and Gen Z, are prepared to walk away from companies that cannot demonstrate they are good corporate citizens," she says. "Transparency and traceability matter."

This desire for value alignment extends right across lifestyle choice-making in diet, health, beauty and fashion. "Just as people are concerned about the food they put in their bodies, they question what they wear on their skin, conscious of the environmental and social impact of their choices," says Ms Cortazzi.

RISE OF THE CONSCIOUS CONSUMER

Evidence of conscious consumerism is everywhere. The most recent *Cone Communications CSR Study* found that almost nine out of ten Americans (87 per cent) would purchase a product because a company advocated for an issue. Going one step further, nearly as many (76 per cent) would actively withhold money from a company supporting contrary beliefs.

What is more, the youth vote is even stronger. GlobalWebIndex surveys found millennials (aged 22 to 35) most likely to pay more for eco-friendly products last year, with Gen Z (16 to 21 year olds) next.

Interestingly, the market player that respondents ranked most responsible for the future of the environment, second only to themselves as individuals and consumers, was not government, brands or celebrities, but manufacturers and production bodies.

Fundamentally, consumers know it's the makers that count; makers not just of things, but of reputations and change.

STANDARDS FOR SUSTAINABILITY

So what can brands and retailers do? First and foremost they should drive supply chain accountability by asking tough questions and auditing not only their tier-one suppliers, but also tier two and three.

ISKO, as a denim mill, would be considered a tier-two supplier, but that does not justify any drop in standards, argues Ms Cortazzi. "Everything we make is produced in a responsible way and you don't just have to take our word for that," she says. "The pinnacle of our sustainability offer, the ISKO Earth Fit collection, has obtained two independent certifications."

More often seen on cosmetics and household products, these are the stringent Nordic Swan Ecolabel and EU Ecolabel, both of which are directly recognised by the end-consumer.

Together they verify multiple responsibility criteria: no use of prohibited and harmful substances; reduced environmental impact; strict sustainability requirements for organic cotton and recycled fibres, dyes and colorants; plus assurances that the health of both workers and consumers is considered uppermost.

FIGHTING FAKERY AND GREENWASH

In an era of fake news and so-called greenwash, it is vital environmental and ethical claims actually stack up, says Ms Cortazzi. "Right now, it is a nightmare for buyers, designers and CEOs, as every garment factory or mill is claiming sustainable credentials," she says. "Retail industry professionals want to do the right thing, but often don't have corporate social responsibility experts to support them. This is why it is really important to ensure claims are backed by a third party."

Everything at ISKO has been verified. In fact, ISKO has obtained life-cycle assessments for every one of its



Just as people are concerned about the food they put in their bodies, they question what they wear on their skin, conscious of the environmental and social impact of their choices



ISKO's high-tech machinery at work in the indigo dyeing process

more than 25,000 products. By doing so, it achieved a world first, becoming the only denim manufacturer ever to obtain pre-certified environmental product declarations (EPDs).

These EPDs assess the life cycle of products, and provide data on the water usage and carbon footprint per square metre of fabric to enable buyers and customers to make responsible sourcing choices with clarity and confidence.

Committed to raising awareness and standards of environmental and business ethics, ISKO is a member of both supply chain platform SEDEX and the Ethical Trading Initiative. It is also a signatory to the Social & Labour Convergence Project, supporting and promoting employees' rights and workers' welfare.

RESPONSIBILITY IN THE ROUND

A truly strategic and systemic approach to sustainability calls for joined-up thinking and actions, says Ms Cortazzi. "At ISKO, it is about a 360-degree approach. We promote a holistic mindset with a longstanding focus on responsibility, innovation and citizenship," she says. "This goes beyond just using low-impact materials, and extends to our culture and systems."

Certified to international standards, an environmental management system ensures robust measurement and monitoring of a full range of impacts at ISKO production facilities, including energy, water, waste, chemicals and emissions.

This bedrock of sustainable production underpins cutting-edge research and development undertaken at ISKO. Every fabric, from the traditional

ISKO PRODUCTION CAPACITY

300m
metres of fabric
per year

2k
high-tech
automated
looms

35
countries with
ISKO offices

25k+
denim product
portfolio

ISKO HEAVILY INVESTS IN RESEARCH AND PATENTED INNOVATION

20+
patents

100+
trademarks

100+
patents pending

denim to newly patented technologies, is a testament to the company ethos of responsible innovation.

SPRINGBOARD FOR INNOVATION

Innovation is simply the norm at ISKO. With 20 existing patents and over 100 more in the pipeline, the research and development team of scientists, biologists and physicists is constantly coming up with new ideas.

Many of these innovations give ISKO a competitive advantage, while bringing a responsible benefit for the planet, too.

ISKO Pop, for example, keeps a combination of comfort and a unique silky-soft feel in a garment, no matter how many times it is washed, minimising use of fabric softeners and chemicals.

ISKO Recall is a durable shape-memory fabric so jeans retain their flattering fit better and require less washing, saving water and energy, as well as cutting down on carbon emissions.

ISKO Cottonized is a fabric entirely derived from man-made fibres creating the same look, drape and wash-down as traditional denim. Reducing the need to grow cotton, it frees up land for food crops, saving on water, energy and emissions.

REPORTING THE ROAD AHEAD

Taken together, all these sustainability initiatives place ISKO in the vanguard of current best practice, but there is always further to go and a better road to travel, Ms Cortazzi concludes. "One of our next projects will be to create a full sustainability report. This will allow us to communicate to our customers our achievements to date and articulate future targets, visions and policies on environment, people, material and fibres."

"When it comes to our responsible strategy, at ISKO, we do not believe in standing still. We believe quite the opposite, which is doing more and stretching ourselves to the limit."

For further information please visit iskodenim.com

ISKO™



Sanjit Das/Bloomberg via Getty Images

Customers at FashionValet in Kuala Lumpur, Malaysia

MODEST FASHION

Brand rationale questioned in modest fashion revolution

The rise of modest fashion has arguably changed the representation of Muslims in Western popular culture, but the convergence of ideology and corporatisation raises important questions for the industry

Gouri Sharma

Halima Aden has just become the first model to wear a hijab and burkini for a photoshoot in US-based magazine *Sports Illustrated Swimsuit*.

The spread, in one of America's largest sports magazines that has an estimated two million subscribers, was among one of the most high profile for the Somali-American model. As a result, it generated a positive response from various figures, with many marking it as a step forward for the representation of Muslims in the West.

As Ms Aden said in an Instagram post: "Being in *Sports Illustrated* is so much bigger than me. It's sending a message to my community and the world that women of all different backgrounds, looks, upbringings can stand together and be celebrated. This is a moment, that's for sure."

Ms Aden's spread is one of the latest representations of hijabi models in ad campaigns, runways and

photoshoots, and comes amid a wider moment currently occurring in the Western fashion industry, the so-called modest fashion revolution.

From high end to high street, the past few years has seen retailers such as Macy's, Gap, Dolce & Gabbana and Nike adding modest clothing – garments that cover more of the body – to their lines. The fashion, the coverage and the financial interest, including a recent investment by Goldman Sachs into Turkey-based online retailer Modanisa, has led to a boom in the industry.

Yet as it's grown, so have the discussions around representation, inclusion and the corporatisation of elements of the Muslim identity.

Reina Lewis, professor of culture at the London College of Fashion, University of the Arts London, and author of *Muslim Fashion: Contemporary Style Cultures*, has been researching modest fashion since the mid-2000s. She has long predicted that fashion would be the latest industry to combine ideology and commerciality.

"It is a new phase of commodification of the components of identity, and we have seen this intersect between religious, ethnic and racial identities before, for example with kosher food," she says. "Muslim-led fashion brands have also contributed to this growth because they helped build a niche market for cross-faith modest fashion which demonstrated to the global fashion brand that this was a viable market."

"In addition, there are the Islamic branding and marketing professionals who have been building specialisms, which have effectively constructed Muslims as a global consumer segment. Initially that

activity was focused on food, for example halal certification food, and then finance, such as Sharia-compliant mortgages. Fashion was always going to be the third in the sequence after food and finance."

US-based journalist Shamira Ibrahim, who writes on culture, politics and identity for publications including *The Washington Post*, *The Atlantic* and *VICE*, says that while there has been some progress in terms of representation and inclusion, brands can sometimes seem to be opportunistic.

"Brands are trying to assign some moral value to what they are putting out. And sometimes that is a little specious because they are trying to assert some sort of value to the product, while the people they are trying to represent are dealing with real things day-to-day and there's not a lot of specific effort, socially, to stand with that," says Ms Ibrahim.

Professor Lewis says despite some benefits amid a corporatisation of components of identity, disadvantages are also arising.

"I do feel that people in the majority culture, which in the UK could be Christian, secularish and white, or Muslim in Saudi, find it very hard to understand how much people from minority cultures may feel excluded if they are disenfranchised from the dominant cultural forms," she says.

"So that could mean black people never seeing themselves on TV or not being able to go shopping because consumer cultures like fashion and shopping are predominant cultural forms now. Being able to participate in that is another form of inclusion, but it comes at a price because it's about spending money and not everyone has this money to spend. It means that activities people might have experienced as being outside the market now become part of the market. There are parallels between the corporatisation of Gay Pride and the shift from community to corporate."

As the modest fashion trend continues to grow and models such as Ms Aden and Muslim sisters Bella

“Fashion can only do a certain amount, but one of the things that fashion and its impact on public discussion can do is be a conduit for much wider discussion

and Gigi Hadid adorn ad campaigns and catwalks, discussions around inclusivity and representation of Muslim women are likely to continue filling column inches.

It's something Professor Lewis thinks is encouraging. "In a way, more inclusivity widens the frame for how Muslims are 'seen, understood, perceived'. Fashion can only do a certain amount, but one of the things that fashion and its impact on public discussion can do is be a conduit for much wider discussion," she says.

For Ms Ibrahim, meanwhile, a step forward in the discussion would see brands play a bigger role in inclusivity in a socio-economic context.

She concludes: "When it comes to fashion, we have to realise that the same hijab or burkini that Halima Aden is being praised for is still a brave choice for women in a public space because of the social culture we are dealing with today."

"As opposed to just tapping a brand to some sort of positive progress and leaving it at that, fashion brands meshing themselves with Muslim inclusiveness could give hijabi women space to actually speak towards those things or put out a press statement which says we don't stand with this when something happens towards the community. These are some of the things that we really have to work on." ●


Halima Aden signing an issue of *Sports Illustrated Swimsuit*, after becoming the first model to wear a hijab and burkini in the US magazine

John Parra/Getty Images for Sports Illustrated

SUSTAINABILITY

Reuse and recycle: low waste, high reward

Five pioneering companies are using innovative methods to reuse and recycle textiles and other products that would otherwise go to landfill

Jim McClelland



Rapanui

Founded a decade ago in a shed on the Isle of Wight, Rapanui now makes clothes from certified organic cotton, in a wind-powered factory and using low-waste print technology.

The company's growing partners optimise use of rainwater, co-planting and insect traps, plus a special ingredient: cow poo. Its manufacturing supply chain employs renewable energy throughout, and recovers and recirculates wastewater cleaned to a standard good enough to drink.

Rapanui has pioneered a traceability tool allowing conscientious consumers to map their T-shirt,

from seed to shop. The brand also pays people to return products for remanufacturing at end of life. It has even created a cloud-based platform called Teemill to share its circular supply chain online, for free.

Sustainability is a core business value and technology helps make it affordable, says Ishwari Thopte, fashion tech manager at the Centre for Fashion Enterprise. "With the help of technology driving an open-source approach, brands are now able to share products and services that find value beyond profit in an often insular and competitive industry. Rapanui's Teemill service is an excellent example," she says.

Deakin and Blue

Described as transformational, Deakin and Blue produces ocean-friendly swimwear for women who not only wish to look and feel good, but might actually want to swim, too.

With suppliers certified to Oeko-Tex standards for textile products, costumes are produced in London from ECONYL yarn, a 100 per cent regenerated nylon fibre made from post-consumer waste, including "ghost gear" of old fishing nets.

Unique to Deakin and Blue is a groundbreaking inclusive sizing system and the company eschews such regressive clichés of swimwear marketing as airbrushed, sexualised models, instead showcasing its garments on a range of body shapes and sizes.

According to Robert Blood, founder and managing director of the NGO tracking and issues analysis consultancy SIGWATCH, a challenge for brands is to meet the contradictory consumer demand for toughness, lightness and innovation, combined with more eco-friendly and natural materials.

"Reusing plastic waste is interesting. Another approach is replacing petroleum-based materials with modified natural ones," he says. "Reebok recently won praise from animal rights group PETA for a 'vegan' non-plastic shoe made entirely from cotton and corn."



Elvis & Kresse

For Elvis & Kresse, the story began back in 2005, at a chance meeting with an unlikely source of raw material for a luxury accessories brand, the London Fire Brigade.

Having learnt how decommissioned damaged fire hoses headed to landfill, founders Kresse Wesling and James "Elvis" Henrit set out to rescue the resource.

For more than a decade now, no London fire hose has gone to landfill, with over 175 tonnes of material reclaimed.

In 2017, the Burberry Foundation teamed up with Elvis & Kresse to tackle leather waste. Their five-year partnership will see 120 tonnes of off-cuts recrafted.

Sustainable fashion needs success stories, says Susan Stevens, chief executive and founder of Made with Respect, a curated collection of handcrafted sustainable luxury brands.



"Providing full transparency and sustainability, while still making a profit is the main challenge ethical businesses face right now," she says. "More and more brands, though, manage to find a balance and Elvis & Kresse is the perfect example."

A social enterprise and certified B Corp, Elvis & Kresse donates half the profits from its fire-hose range to the Fire Fighters Charity.



Hugs & Co.

Marketed as the the British driving loafer, the new TSI design from luxury footwear firm Hugs & Co. features as innovative sole made from upcycled tyre treads.

As well as providing improved durability and grip, the repurposed

material requires only a fraction of the energy typically used to create new shoe soles, with production also generating just a tenth of the CO₂.

Importantly, the design helps highlight the need to tackle the problem of waste tyres. In the UK alone, more than 100,000 tyres are taken off vehicles every single day, generating both serious environmental impact potential and significant material resource prospects.

Opening the door to creative, commercial responses, such as the TSI, the circular economy is ushering manufacturers and makers into the next world of materials, where leftovers await rediscovery as a source of value.

It can even do so with style, says Susan Harris, technical director at Anthesis. "Finding new uses for materials we used to think of as waste can not only lower costs, but also reduce environmental impacts and inspire a beautiful industrial aesthetic," she says.

Gucci

Sustainable luxury is a matter of balance. At Gucci, the optimal combination of aesthetics and ethics is called "equilibrium".

Gucci is one of the world-leading fashion brands that make up the Kering Group. A pioneer in reporting on impacts, Kering produces an environmental profit and loss (EP&L).

The EP&L measures carbon emissions, water, pollution, land use and waste along the entire supply chain, with an ambitious target to shrink its footprint 40 per cent by 2025. Focused on upcycling waste, Gucci Up reused 11 tons of leather scraps in 2018 and collected 92 tons of textiles.

This is sustainability at scale and responds to mainstreaming of both corporate responsibility and consumer awareness.

According to data from Wearisma, an influencer intelligence and analytics company, 14 per cent of influencers have mentioned sustainability-related topics in 2019 so far.



These numbers are significant, Wearisma chief executive and founder Jenny Tsai concludes. She says: "Sustainability is no longer simply a 'trending topic'; its importance is now lodged in much of the public conscience, driving how influencers relate authentically to their audiences." ●



Avery Dennison's 2025 Sustainability Goals

- ◆ **Greenhouse Gas Emissions**
Reduce absolutely greenhouse gas emissions by 3% every year.
- ◆ **Paper**
Source 100% certified claim paper, 70% will be Forest Stewardship Council (FSC) –certified.
- ◆ **Waste**
Our operations will be 95% landfill-free, with a 75% of waste repurposed and we will help our customers reduce the waste from our products by 70%.
- ◆ **Chemicals**
70% of the chemicals we buy will conform to our sustainability principles.
- ◆ **Films**
70% of the films we buy will conform to our sustainability principles.
- ◆ **Products and Solutions**
Use innovation in sustainability—ours and others—to grow revenues from sustainability-driven products and services.
- ◆ **People**
Continue to cultivate a diverse, engaged, productive and healthy workforce with an industry-leading safety record worldwide.
- ◆ **Transparency**
Commit to goals publicly and be transparent in reporting progress against them.

Enabling transparency and visibility across the fashion supply chain

Improving transparency and visibility in the fashion supply chain helps avoid waste and create a sustainable circular economy

It's hardly breaking news that the clothing and textile industry is responsible for 10 per cent of global greenhouse gas emissions. But key players in the sector are working to address this critical issue and ensure sustainability becomes a top priority. From moving towards a more circular economy, where recycled products become commonplace, to limiting waste through innovative technologies, there are countless forward-thinking solutions to this complex challenge.

"The question of how we can make our products more sustainable and more circular is at the centre of the work we do. For example, we're working on reducing the weight of our products, and increasing the content of recycled materials, as well as offering a solution where scrap is taken from our process and reprocessed into a yarn that we can then incorporate into our solutions going forward. We're also looking at ways that our digital solutions can enable recycling of garments," says Michael Colarossi, vice president, innovation, product line management and sustainability, apparel solutions at

Avery Dennison, a global apparel labelling and RFID (radio-frequency identification) specialist.

By leveraging its singular size and scale, Avery Dennison is able to address the core problems facing the fashion industry and bring together stakeholders at all levels of the supply chain to make meaningful differences in the communities where it operates.

The enabling of a transparent supply chain that allows customers to have more visibility over the journey of their products and production systems will be well suited to deal with waste. When a company lacks a connected supply chain, it can be prone to issues of over-production, which will result in unnecessary waste.

Avery Dennison's Janela™ solution is a pioneering consumer engagement innovation providing visibility of a product's journey within the supply chain. When linked with RFID technology, it optimises the supply chain for many firms in the apparel industry, resulting in lower levels of waste and improving transparency for the consumer.

"Our RFID and Janela solution is a digital knowledge base that provides

information about specific items along the supply chain, which allows for a very efficient and accurate way of improving the visibility from the moment an item is created, through to its journey on the supply chain, all the way through to retail and eventually with the consumer in their home," says Francisco Melo, vice president and general manager, global RFID at Avery Dennison.

For apparel businesses, using RFID to identify exactly where stock is in the supply chain helps optimise distribution and shipping, and with Janela consumers are also able to gain insight from these intelligent labels. Not only can Janela give consumers detailed information on how a garment is manufactured, how it can be styled and cared for, it can also give access to recycling information, including where the nearest second-hand or

charity shops are located and where used items can be donated, based on the user's location.

It's estimated there are close to 150 million tons of plastic in the world's oceans, with 80 per cent of this amount disposed of by countries in extreme poverty. To combat the spread of single-use plastics from labelling and decrease plastic pollution, Avery Dennison has a patent for sustainable woven labels and printed fabric labels, commonly used to show information on what the garment is made from and how to care for it. The labels are made from recycled polyester and can be recycled.

Avery Dennison is actively licensing this patent to others in the industry and donating large parts of the licence fee to Plastic Bank.

Through a partnership with Plastic Bank, an organisation focused on reducing the amount of plastic waste in our oceans and waterways, Avery Dennison will be providing funds to support a global system for recycling plastics with the creation of recycling centres in areas at highest risk of plastic pollution. This initiative reduces the amount of plastic in the ocean, as well as improving the lives of people in poverty.

"As a materials science company, we are always looking into ways of making our materials more sustainable and ensuring that we reduce waste across the board, reduce landfill and help encourage a more sustainable approach to the market," says Mr Melo.

Plastic Bank is encouraging local organisations and individuals to collect plastic bottles and plastic waste from the environment before it enters the water stream. These individuals earn credits for plastic collection, which can be used to buy school tuition for their children, clothing or cooking oil.

Once all the plastic has been collected, Plastic Bank then works with organisations to bring it back into the supply chain. Projects like this don't just incentivise the local community and

create a micro-economy, they ensure Avery Dennison can have a robust supply chain of material and also act as a force for good in the wider industry.

"Avery Dennison is uniquely positioned in the industry, especially in where we fit in the supply chain. Our business model requires us to have very strong relationships at both a brand and retail level. But it also requires us to have very strong relationships at a manufacturing level, too," says Mr Colarossi.

"We believe that our solutions can help brands and retailers, as well as garment manufacturers, become more efficient and take waste out of their systems and drive circularity through what our products offer."

Avery Dennison has an influence that extends throughout its supply chain to champion issues of sustainability. From ensuring that its suppliers and the organisations it works with are abiding by the highest standards from a social and environmental perspective, Avery Dennison ensures it is driving the right behaviour in the industry.

"As one of the largest players in the apparel space, we have an obligation to continue to act as a force for good, and work with our communities, suppliers, brands and retailers to drive this idea of sustainability," says Mr Colarossi.

The transition to a more sustainable and circular economy in the apparel industry will clearly benefit the environment, but this shift is about more than just doing what's right, it's also good for business.

"We believe those companies which operate and behave sustainably going forward are going to be the ones that are successful," he concludes.

For more information please visit [averydennison.com/rbis](https://www.averydennison.com/rbis)



“Transition to a more sustainable and circular economy in the apparel industry will clearly benefit the environment, but this shift is about more than just doing what's right, it's also good for business

INFLUENCERS

Fashion influencers take the reins

How consumers view and engage with fashion brands is being transformed by high-profile influencers, who are now gracing the red carpets of the most elite events and deepening their commercial ties in the industry

Sharon Thiruchelvam

Influencers have finally infiltrated the most elite circles of the fashion community. When four social media-born starlets graced the red carpet of the Met Gala – a charity-fundraising pageant hosted by New York’s Metropolitan Museum of Art’s Costume Institute – this year, a significant threshold was crossed.

Attendance for the event is strictly vetted. For James Charles, the

19-year-old make-up artist and beauty blogger known for his ultra-high definition looks, it was no less than “a step forward in the right direction for influencer representation in the media”.

Like all influencer collaborations, a sponsorship deal had made the appearance possible. Camila Coelho (7.9 million Instagram followers) attended as a guest of the womenswear designer Diane von

Furstenberg, and YouTubers James Charles (15.3 million followers), Liza Koshy (17.8 million followers) and Lilly Singh (8.8 million followers) were invited by YouTube.

YouTube, owned by Google, bought several tables at this year’s Met Gala, as the company vies to establish itself as a convincing platform for the fashion industry. In the past it has struggled to lure fashion followers from Instagram but this year attracted big names such as Alexa Chung, Naomi Campbell and Victoria Beckham, who all set up their own channels.

With the value of the influencer economy predicted to stretch to between \$5 billion and \$10 billion in terms of global advertising spend by 2022, according to *Business Insider Intelligence*, the takeover almost seems complete. Century-old fashion houses and online-only brands founded this week are able to find a niche influencer to act as a living brand ambassador.

The ubiquity of influencers, the saturation of social platforms with “sponsored content”, and consumers’ scepticism over manufactured content makes the terrain for fashion brands more difficult to navigate. For a long time marketers and brands have talked about “authenticity”, but perhaps a more accurate measure of an individual’s ability to influence is credibility.

Emily Jane Johnston, who runs the blog *Fashion Foie Gras* and could be considered an ‘influencer veteran’, having started blogging in 2008 when Instagram was a niche platform for photographers, recalls

“

For a long time marketers and brands have talked about ‘authenticity’, but perhaps a more accurate measure of an individual’s ability to influence is credibility

how London had six fashion bloggers who would be taken to PR paid-for events to populate their posts. Now, there are literally thousands.

That Amazon, the apex of mass consumerism, is to launch a limited edition collection designed by global influencers in collaboration with The Drop to go live internationally for 30 hours only, is a sign that influencers are now an integral part not just of marketing and sales, but also product development.

Like weight-classes in boxing, influencers’ clout is divided into various leagues: nano-influencers (800 to 10,000 followers), micro-influencers (10,000 to 50,000), macro-influencers (100,000 to one million) and ultra-influencers (more than one million). In theory, there is an influencer suitable for every brand’s stature, price point and budget.

Indeed, a report from the online streetwear magazine *HypeBeast* found that only a third of streetwear enthusiasts surveyed considered social media influencers the most credible figures in streetwear. The large survey of nearly 41,000 consumers around the world found that musicians, industry insiders and contemporary artists were considered most influential. Their credibility came well ahead of social media influencers, celebrities and athletes.

We are already seeing influencers emerge who aren’t sole, full-time social media figures, but are also measured by their success in whatever industry they work in, be it interior design, beauty, art, fashion, sport or even gardening, and that

credibility makes them the right influencers for fashion brands looking to add substance and wider cultural clout to their brand.

Recently, much talk has been made around micro-influencers. Some new fashion brands have built their business strategy entirely around a select few influencers and a highly targeted Instagram marketing strategy. Budapest-based Nanushka, which was hardly known two years ago, is now carried by Net-a-Porter and Farfetch following a successful targeted Instagram campaign and Instagram endorsements from fashion stylist @monikh and blogger @songofstyle.

Influencers are also deepening their commercial ties to brands directly. Leandra Medine, the founder of the online fashion blog-cum-magazine Man Repeller, has reportedly invested in the young direct-to-consumer activewear brand Outdoor Voices and underwear brand Lively and offers consultation services to fashion brands.

Others are rewriting their contracts to swap retainers for equity. Lifestyle blogger Arielle Charnas owns a single-digit percentage stake in Bandier and frequently mentions the retailer in her Instagram stories and posts. She reports that she has no agreed contract on how often she should mention the retailer, allowing her endorsements to appear natural.

According to industry publication, *Business of Fashion*, fashion influencers have taken inspiration from the entertainment industry, where established actors and musicians have graduated from simply starring in films or being “repped” by a record company, to running their own production houses and studios that allow them creative and financial control, while investing in new talent.

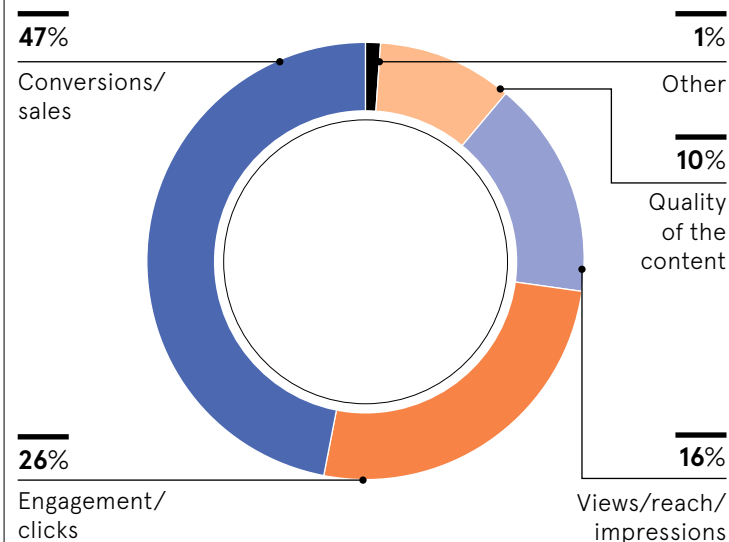
Successful fashion influencers, who have only ever earned their keep through social media and paid-for content, aren’t just pretty faces with great self-styling skills, but often also astute business people. Many have a keen sense of the inside workings of the industry, particularly its financial levers, and are continuing to challenge the status quo when it comes to fashion marketing. ●



Influencer Camila Coelho attended the Met Gala as a guest of designer Diane von Furstenberg

HOW MARKETERS MEASURE THE SUCCESS OF AN INFLUENCER CAMPAIGN

Global, cross-industry survey of consumer-facing marketing professionals



Relatable 2019

OPINION

‘Retailers must provide fashion that is affordable to all income brackets while respecting their societal responsibilities for sustainable production’

Social and environmental impact of our clothing is increasingly being scrutinised by consumers, NGOs, politicians and retailers themselves. Recent reports, including the Commons environmental audit committee report published in February, have focused on the amount of textile waste, the impact on the environment and the social cost of our fashion choices.

Such scrutiny is a key part of encouraging transparency among retailers and manufacturers in both the UK and abroad. British retailers are embracing greater openness by providing better information about where our clothes come from and the ethical standards they adhere to.

Retailers must provide fashion that is affordable to all income brackets while respecting their societal responsibilities for sustainable production. Articles about “£5 dresses” bring up important questions about sustainability, but also how we reduce the cost of living for those who have suffered years of minimal real wage growth.

The British Retail Consortium (BRC) and our members are trying to mitigate the social and environmental cost of the fashion industry throughout the supply chain. Retailers recognise they have a duty to reduce the impacts of clothing on carbon, water and waste, especially as the industry meets the demands of a growing population.

This impact will occur regardless of the materials used in fashion. Natural fibres such as cotton must be grown, requiring land and water, whereas synthetic fibres like polyester, while recyclable, require fossil fuels to make.

Thankfully, progress is being made. From 2012 to 2016, the amount of water and carbon required to make each tonne of clothing has fallen by 6.5 per cent and 8 per cent respectively. The BRC, working with retailers, manufacturers, consumers and government, aims to create, foster and disseminate good practice across the industry.

And more can be done. Our Better Retail Better World campaign builds on a framework set out by the United Nation’s Sustainable Development Goals (SDGs) to drive industry co-operation on issues such as climate change, deforestation, gender equality and responsible production, all of which are impacting the fashion industry.

Retailers that have signed up to the initiative are committing to meeting targets within the SDGs and working collaboratively to ensure the industry can meet the UN’s own targets for 2030.

Lately, there has been intense media focus on fast fashion and the link to microfibres, microscopic plastic fragments that get into our water systems and harm marine life. Many of these microfibres come from our own clothing, entering the water supplies when we wash our own synthetic clothing, such as polyester and nylon.

The full implications of microfibres entering the marine ecosystems and food chains are yet to be fully understood, but retailers, academics, NGOs and manufacturers are working hard to raise awareness and find viable solutions that will prevent this issue getting worse.

Another issue rising through the media consciousness has been the environmental and ethical implications of animal-derived products in fashion, from wool and leather, to the animal-derived dyes and glues. This has led to the rise in vegan clothing and footwear lines from a variety of retailers. The complex nature of fashion supply chains is forcing retailers to scrutinise the whole journey of their clothing from the farm to the factory to the outlet.

Fashion is incredibly important, not just to the retail industry, but to the UK economy. The BRC is committed to bringing together retailers behind a common set of measurable goals that can ensure a future of sustainable and ethical fashion consumers trust. ●



Helen Dickinson
Chief executive
British Retail Consortium

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