

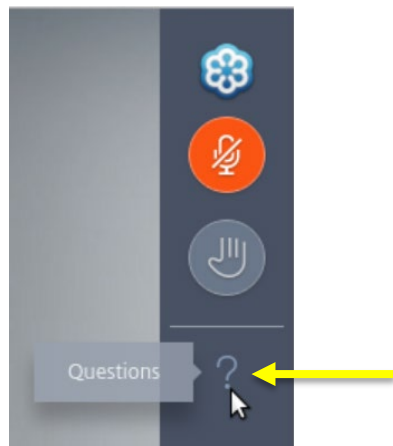


Fibre Footprints

Sustainability Strategies For The European Clothing Sector



- Please use the 'question' function to type your questions which will be reviewed in the Q&A session at the end of the webinar.



- The webinar is being recorded and will be made available on the ECAP website.
- Following the webinar you will be emailed a short survey.



Today's Agenda

Welcome: Susan Harris

Introduction and insights: Ria Kearney

First hand insights: Zalando - Beth Greenaway

First hand insights: House of Dagmar - Kristina Tjäder

Q&A: Susan Harris

Next steps & Thank You: Susan Harris





Ria Kearney
Associate Director
(Sustainable Apparel)

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Introduction and insights



The total quantity of clothing consumed in the EU-28 in 2015 was:

6.4 million tonnes

Annual carbon, water and waste footprints for this total quantity are:

CARBON 195 million tCO₂e

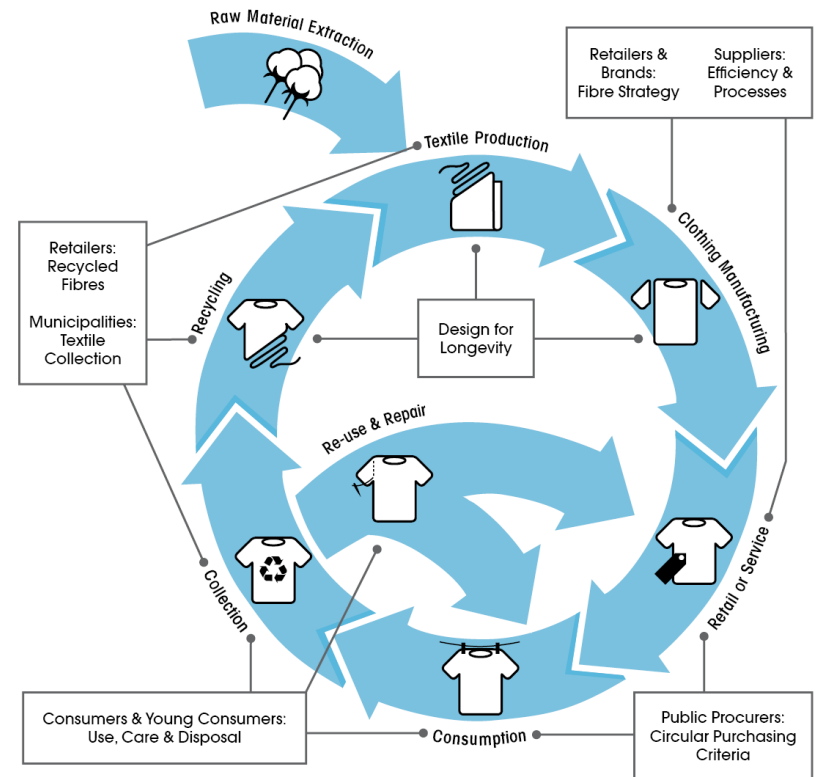
WATER 46 400 million m³

WASTE 11.1 million tonnes

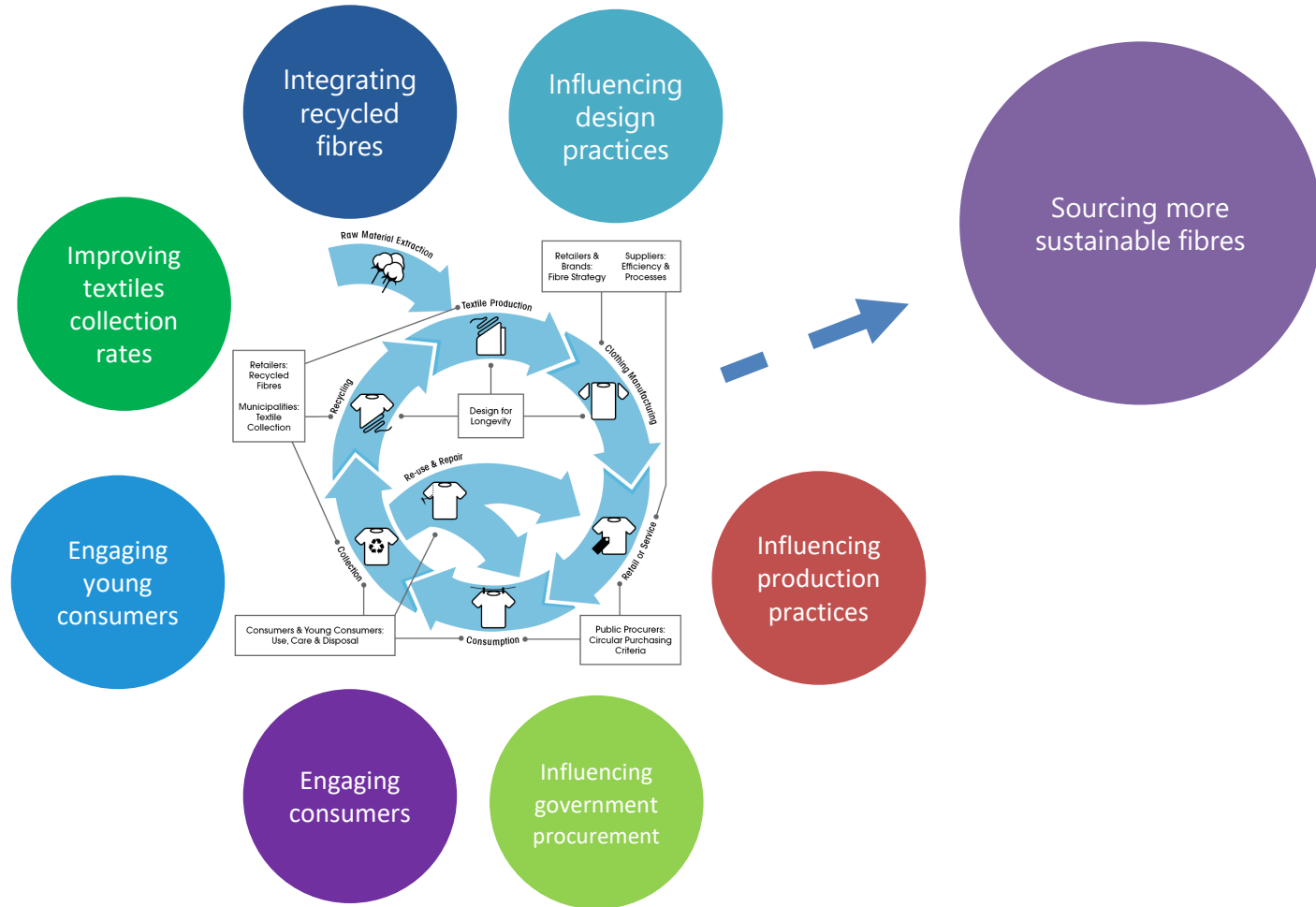


Source: ECAP's Mapping the clothing impacts across Europe report

Cutting the environmental impact across the **clothing supply chain** and generating value for business through **collaboration**, measuring and **sharing best practice**.



What is ECAP?



ECAP action areas



Sustainable Fibres Action Area

- Worked with European based apparel brands and retailers
- Supported the **development and implementation of sustainable fibre strategies to enable the switch from conventional fibres**
- Achieve improvements in the environmental footprint of clothing being sold in Europe
- Inspire other brands and retailers through knowledge sharing and demonstrating best practice





IMPS&ELFS

DACMAR

STAR SOCK

BOBO CHOSÉS

BONOBOS
JEANS

OVS

PRIMARK®

PeakPerformance®

 zalando

Etam

s.Oliver®

Sustainable Fibres Action Area

wrap


ECAP
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Sustainable Fibre Framework

1. **FIBRE BASELINE:** Baseline fibre footprint and understand key impacts
2. **SET STRATEGY:** Set strategy and targets to integrate more sustainable fibres
3. **IMPLEMENTATION:** Implement sustainable fibre strategy with guidance
4. **FIBRE ENDLINE:** Track progress and uptake of sustainable fibres
5. **COMMUNICATE:** Communicate progress and share learnings across the sector



Key Learnings

- Understanding your fibre baseline is a valuable first step
- Invest in internal engagement
- Talking frequently to your suppliers is critical
- Talk to your counterparts
- Learning by doing is an essential part of the sustainable fibres journey



Key insights



Achievements to Date

- Increased uptake of more sustainable fibres
- Improved internal processes
- Improved internal engagement and capacity
- Growing market demand



Key insights



Recommendations

- Understand your fibre baseline as your starting point
- Prioritise action and resources
- Nominate dedicated resource
- Communicate clearly and frequently
- Stay informed



Key insights



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Beth Greenaway

Senior Sustainability Manager

Zalando SE

About Zalando

- Founded in 2008 in Berlin, Zalando is Europe's leading online fashion platform.
- We have 27 million active customers in 17 countries and work with 2000+ brand partners.
- We also have our own private label assortment offering clothing, shoes and accessories for women, men and kids.
- In addition to joining a number of other industry initiatives, ECAP was a big step on our sustainability journey and helped us create our first sustainable fibre strategy for our private labels.



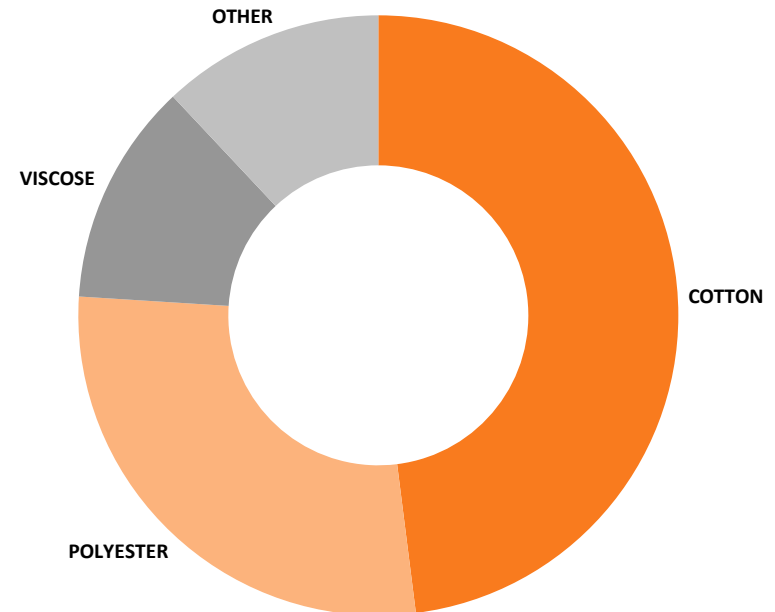
Why sustainable fibres and ECAP?

- Back in 2016 we wanted to understand both the impacts of our fibre sourcing decisions and how to address them.
- We wanted to understand the role of our private labels in our carbon footprint and could use the ECAP footprinting tool to do this.
- The structured approach and consultancy support were attractive to us.
- A colleague had previous positive experience of the Sustainable Clothing Action Plan (SCAP) in the UK.



Key focus areas

- We identified cotton as our most used fibre (50%), followed by polyester and viscose.
- Together, the top 3 fibres make up almost 90% of our total sourcing volume so we developed our strategy to focus on these.
- We set ambitious internal targets for more sustainable cotton, and joined the Better Cotton Initiative to take advantage of existing tools and economies of scale.
- We also partnered with CanopyStyle to pledge to switch to viscose sourced from sustainably-managed forests.



Key insights and learnings

- A clear message from management is needed and it takes time to adapt internal processes and systems before placing orders.
- KPIs are often environmental, but emphasizing the social impacts of more sustainable fibre choices helped drive internal engagement.
- It's been encouraging to see big impacts with small changes. As we started to use BCI, we made a good reductions in our water footprint quite quickly.
- Sourcing recycled polyester has been a challenge, and we found we needed to build better relationships with our mills to avoid more costly minimum orders at tier 1.



Achievements and next steps

- We sourced 7% of our total cotton as Better Cotton in our first year, which felt like a huge achievement as this was concentrated in the last 6 months.
- We've significantly improved since and are working towards 30% Better Cotton by the end of 2019.
- Teams are now more aware of sustainable fibre choices and feel empowered to drive the topic by themselves with limited support.
- With a clear plan for our main fibres, we have been able to start looking into more innovative materials and processing, especially in our footwear and accessories.



Advice to others getting started

- Engage with the senior management team as early as possible to gain their support.
- Allow time to work out existing internal processes and spend time explaining the “HOW” as well as the “WHY” to relevant teams.
- Understand the commercial business strategy and your baseline impact, to ensure the sustainability strategy is aligned.
- Start with one or two focus areas, to focus your impact and manage your time most effectively. You can always add on other topics once you have covered the basics.



DAGMAR

Kristina Tjäder
Sustainability Manager

House of Dagmar

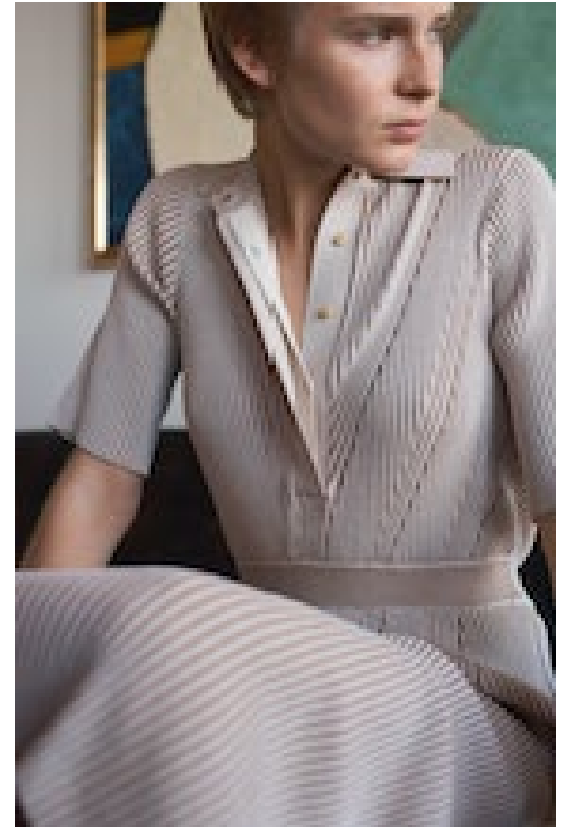


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About House of Dagmar

DAGMAR

- Kristina Tjäder is one of three sisters that founded House of Dagmar, a Swedish fashion brand based on the legacy of their late grandmother, Dagmar.
- Not only does her name carry the brand today, Dagmar's sense of quality and ambition to create luxurious and timeless fashion is still very much alive.
- We create sustainable and expressive collections with knitwear at the core.
- Our ambition is to create responsible collections that do not damage the ecosystem and inspire our customers to invest in high quality pieces that have a longer lifespan than the average clothing item.
- Our clothes are not designed for a specific collection, but instead garments from different collections can be used together.



Why sustainable fibres and ECAP?

DAGMAR

- We want people to cherish our garments and wear them over and over. In response to the increasing need for action in our industry, we decided to create collections uncompromisingly sustainable yet aesthetic.
- By joining ECAP, we could measure and learn about the baseline of our footprint and make decisions to improve our fibre choices, in terms of both social and environmental responsibility.
- Our goal is to offer 100% more sustainable fibre collections by 2025, with the longevity of a garment paired with the least negative impact on the environment.
- As a business we would like to be 'climate neutral', and we are trying to understand how we could reach this as part of the additional support under ECAP.



House of Dagmar



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Key focus areas

Our ambition is to decrease the impact of CO2, water and waste of our collections.

By measuring our footprint with the help of ECAP, we have targeted three focus areas.

1. To increase the use of more sustainable fibres that have the least negative impact on the environment, including continuously sourcing more recycled fibres.
2. To develop a long-term business model that supports a circular economy.
3. To fully understand how to reach our goal to become climate neutral.

“To inspire and educate the consumer will be a key factor for a real change and a more sustainable future.”

Key insights and learnings



- The biggest impact of our collections is from the production of viscose, cotton and wool.
- After the first fibre footprint analysis, we discovered that organic cotton production requires more water on average than viscose; understanding the trade offs between more sustainable alternatives has been a key challenge and learning.
- Some studies suggest the use of recycled wool versus virgin wool will give on average a 95% reduction in carbon and 85% reduction in water use.
- Communicating with our customers is important – our customers do not yet seem to understand what choices they should make.
- By connecting our own internal sustainability goals to external issues has helped to engage our teams and has been an effective driver for the management team to understand why a circular business model will bring new opportunities.

Achievements and next steps

DAGMAR

- From using **7% sustainable fibres in 2017 to 25% in only 2 years** has given a good understanding of what impact different fibres have and how we can take action to address them.
- Truly understanding how design decisions impact the overall footprint of the product. We are holding an internal workshop which will focus specifically on **design for recycling** and how we can engage with textile recyclers.
- Understanding the importance of engaging our customers to make better informed decisions led to the launch of a **new hangtag called “Good Choice”**.
- Planning to open **“green” flagship store** and a physical **Dagmar Decades** store where we will encourage people to hand in and buy second hand clothes.
- Collaborating with **Re:newCell** to develop regenerated viscose fibres that will replace the use of regular viscose and with **“Skogens Tyg”**, a project with the goal to make a sustainable fibre out of paper from Swedish forests.
- By joining the Swedish organisation, **STICA** we will **reduce our GHG emissions with 30% by 2030**. It means creating realistic, time-bound plans for reduction and reporting our progress on a regular basis



House of Dagmar

wrap

ECAP
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Advice to others getting started

- Understand your current impact – start measuring and learning about your baseline.
- Get the management team on board early on, and make them see that having a sustainable ethos as a brand is important to employees, as individuals who fully understand the impacts of the industry. It was our employees which really drove the work we have done on sustainable fibres to date, rather than our customers.
- Structure and plan a long-term business model that aligns to your brand values and to a circular economy will be key to achieving a more eco-friendly industry.
- Connecting our sustainability goals including our sustainable fibre strategy to external issues such as climate change helped individuals understand the importance of our goals.

Q&A Session



Questions & answers



Next steps

- Sustainable fibre case studies & all other project outputs will be published at www.ecap.eu.com
- The Design for longevity platform can be accessed for free at: <https://designforlongevity.com>
- Short webinar survey



Next steps



Thank you



Thank you

