

# Making Fashion Sustainable

The Journey to 2030

**FUTURESCAPE**

# Fashion is trashing the Earth

## **Since 2000 Global fashion production has doubled**

But the number of times we wear each item has dropped by a third  
Every minute a truck full of unwanted clothes is incinerated

## **Less than 1% of clothing is recycled**

Textile production emits more greenhouse gases than all international flights and shipping combined

## **And we may also be eating our clothes**

During washing, synthetic clothes shed plastic microfibres, 500 million tonnes of these end up in the ocean every year and enter our food chain



# It's time to change



The growing sustainability movement is based on the realisation that sustainability leadership can serve as a real source of differentiation.

Brands that are focusing on sustainability are now earning a large and loyal customer base through efforts that range from product development to innovative campaigns and involvement in sustainability initiatives.

Millennials in particular are interested in more-sustainable solutions; A Futurescape research has highlighted that Customers want to know about the sustainability impacts of what they buy

**61% want to know about the chemical content of the product**

**41% want to know about how it will be recycled**

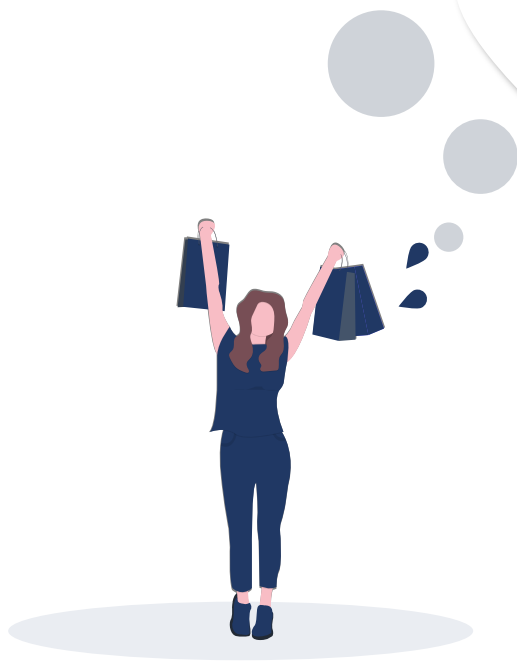
**45% want to know about environmental impacts**

**38% want to know the health impacts**

**Fashion is transforming in radically different ways!**

# Making Fashion Sustainable

## The Journey to 2030



### A discussion with

Abhishek Ganguly, MD, Puma India

Neelendra Singh, MD, Adidas India

Sanjay K Jain, MD, T T Ltd

Sanjeev Mohanty, MD- South Asia, Middle East & North Africa, Levi Strauss & Co.

Eshna Gogia, Global Ecosystem Developer, Helixworks Technologies

Namrata Rana, Director Brand & Strategy, Futurescape





## Making Fashion Sustainable - The Jo





## Sustainable Experience Transformation

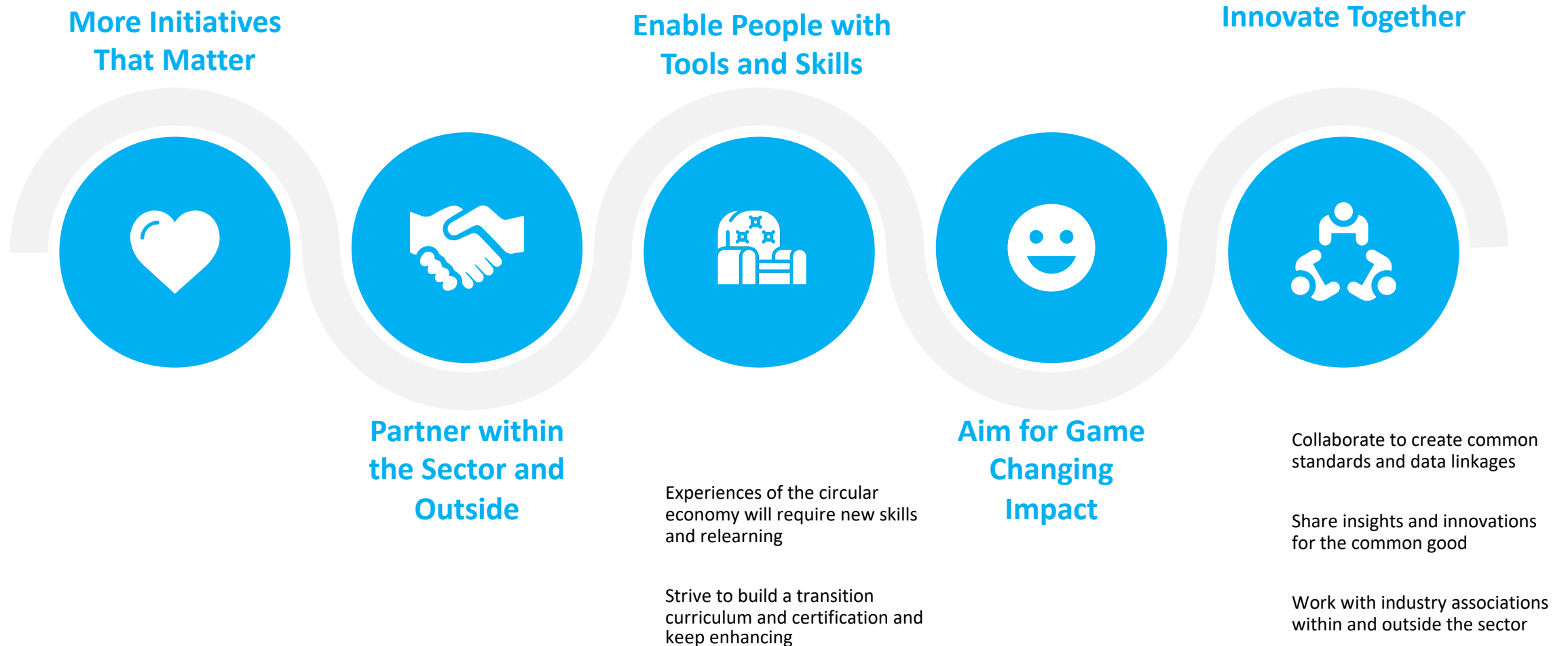
- 'We started waterless technology in 2011, and have saved 3.5 billion litres of water till now.'

Now, we are requesting all our competitor brands that make jeans to take this technology. In other areas too we are open sourcing our learnings, processes and technology.'

Sanjeev Mohanty, MD- South Asia, Middle East & North Africa, Levi Strauss & Co.



# Sustainable Experience Transformation





## Sustainability Strategy

- Sustainability has been core to Puma's existence. In 2015, we decided on 10 sustainable goals that we wanted to reach by 2020. We believe that sport influences lives and there is an imperative to reach these goals. How we impact the planet positively is core to our approach.

Abhishek Ganguly, MD, Puma India





# Sustainability Strategy



## Neelendra Singh

- Our framework in Adidas covers the entire lifecycle of sport where sport is made, played and sold. So sustainability for us covers the entire lifecycle of sport..
- It's not a sprint, it's a marathon. It needs stamina and commitment to be able to live the full promise of sustainability.



## Sanjeev Mohanty

- There are various pillars in our pursuit of sustainability - usage of materials, the way you sell, the way you impact societies, where you sell and where you source from.
- All put together it has a transformative impact in terms of how we do business and how we conduct ourselves.



## Namrata Rana

- We need bottom-up action and solutions, developed with a next generation mentality, featuring tangible examples and actionable plans.
- We need to move the industry away from the current, wasteful way in which it operates.



## Sanjay K Jain

- There are many forms of sustainability and typically people attribute sustainability with a cost. There are a lot of things which we can do without adding cost to the value conscious customer. Eventually the consumer, channel and competition starts accepting your view and start to adopt your sustainable practices.



## Eshna Gogia

- There is so much happening in terms of new materials and improving on the processes of the past.
- Transparency and traceability are important aspects in bringing about in a sustainable model of growth in the fashion industry.

## Circularity

- “Circularity thinking starts with design. The materials used, manufacturing process, customer usage and recycling. Futurecraft 4D is an example of these enhancements.”

Neelendra Singh, MD, Adidas India



# Designing for Circularity

## Think Recyclables

Materials that cannot be recycled will be replaced with material that are deemed recyclable. This is a progressively faster transition inline with customer demands and compliance needs.

Emerging solutions need to be scaled and investments in further development of alternatives are the need of the hour



## Non Blended Fabric is the Way Forward

Companies are looking to invest and transition towards materials that are not blended.

This eases the recycling and reuse of products in an effective and efficient way

## The Experience and Journey Are Expanded

Enhanced product journey maps will define how products are designed, manufactured, used, shared or recycled. Informed choices will factor multiple cycles, zero wastage, smart materials, energy management and more



## Recycling and Reuse

- 'Why can't there be a secondhand market? With changing lifestyles the usage per garment has come down in a big way. Earlier we probably wore the same product many times. Is there a way to organise the market? A company buys branded secondhand clothes, refinishes them and offers them at a competitive price. I think there is a big opportunity'

Sanjay K Jain, MD, T T Ltd.





# Recycling and Re-Use Ecosystems

## Organise and Connect the Re-Use Market for Scale



Efficient digital marketplaces will scale the re-use market. This means connecting the various entities of the re-use and recycle ecosystem with technology interlinkages and common data formats.

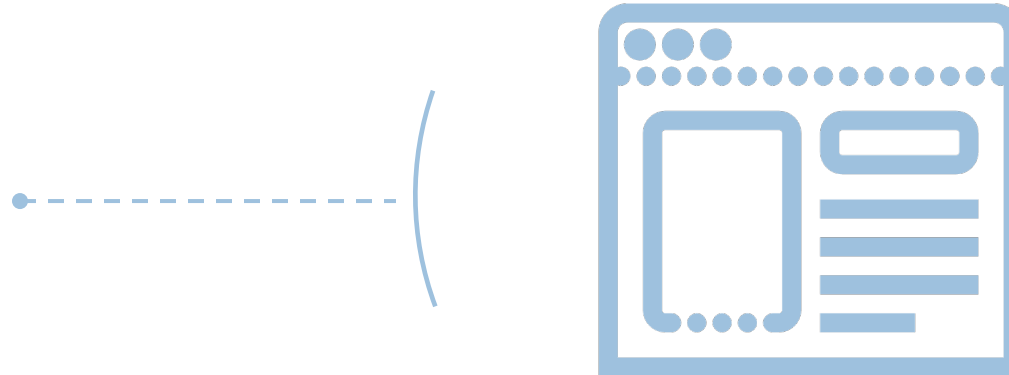


## Re-imagining the Customer Experience

- The digital branded store will be a lot more than simply selling merchandise across multiple channels. They need to be reimagined for the jobs to be done and the opportunities that technology provides.
- Find, Buy, Service, Recycle and Help are the core intents of the customer but how teams and partners Learn, Collaborate, Connect will create opportunities of responsible growth in future



## The Store Becomes an Important Touchpoint



**Focus on the customers' jobs to be done as you design the experience for a circular economy**

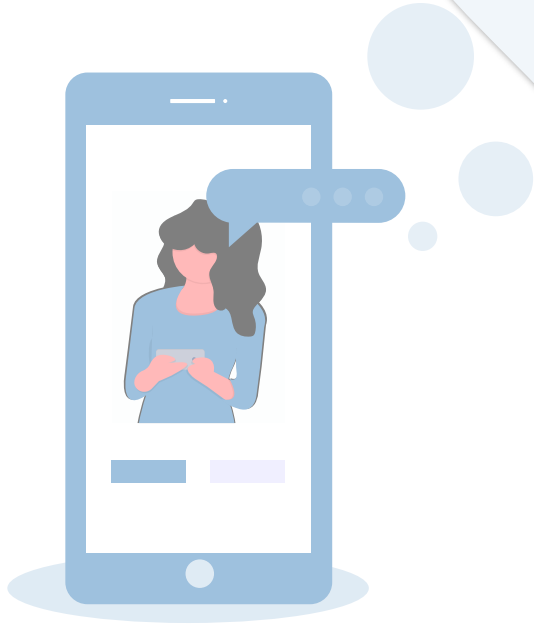
## Technology and Trust

- “Let's say any company says it's hundred percent cotton. How do I know it? How do I check it as a consumer, the certifications are not enough anymore”

Eshna Gogia, Global Ecosystem Developer, Helixworks Technologies



# Authenticity and Technology



**Technology stack builds the Information chain**



Invest in a common technology and standards. Help the extended ecosystem adopt this



**Protocols and Actions that Build Trust**



Build ecosystems



## Sustainable Experience Transformation

- “Today’s world is already facing immense challenges and sustainability and balance in fashion can’t just be a few additional words that are tossed into the discussion or a couple of new elements that need oversight. Sustainability and balance have to be about people. An awareness of actions, their unintended consequences and long term commitment.”

Namrata Rana, Director Strategy & Brand,  
Futurescape





# Open Source To Increase Momentum



Open Source Your Knowledge

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Share the process that builds the common good.  
Encourage others to build it further

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Build and Enhance for Common Good

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# Making Fashion Sustainable

THE JOURNEY TO 2030



Impact of Lifestyles on Usage



Pricing models to enable transition



Adopting Sustainable Solutions

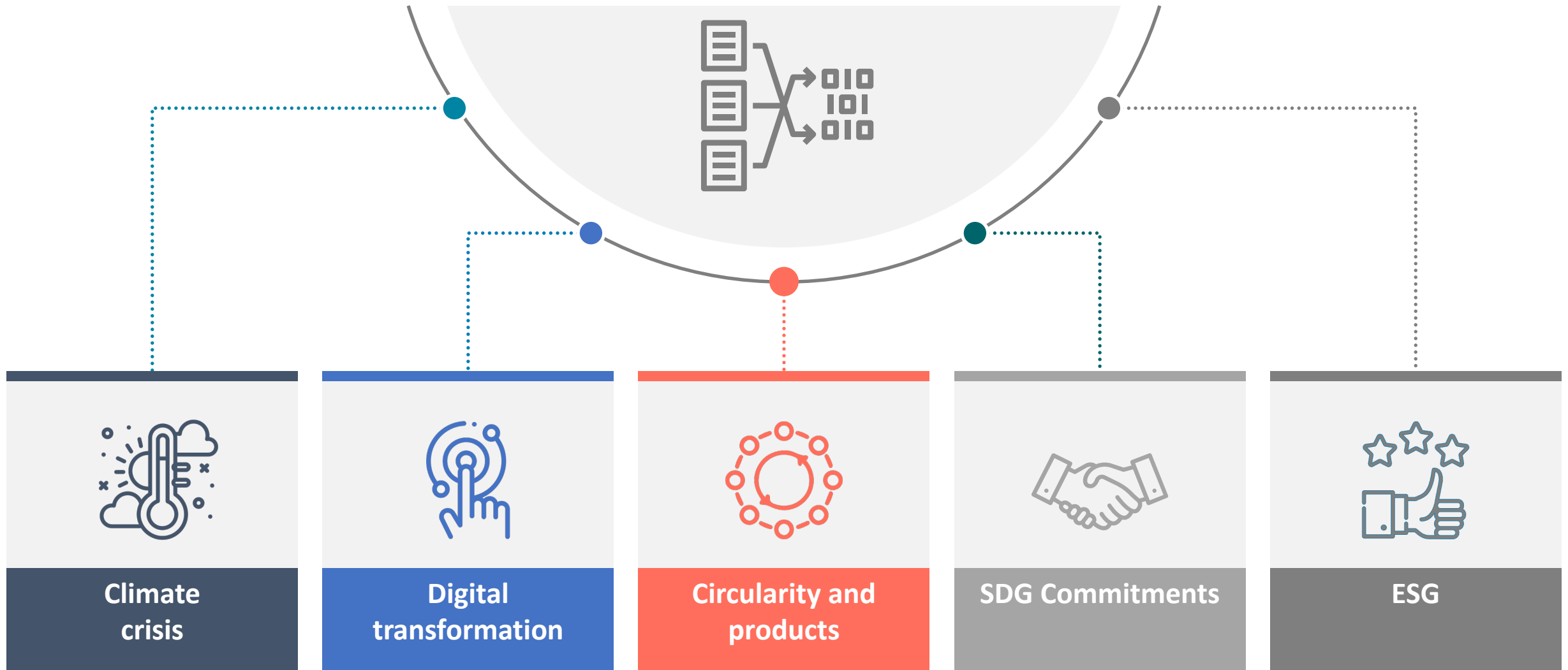


Reuse and Recycle Opportunities



2020s - Time for Action

# The Imperatives for Sustainable Experience Transformation





## KNOWLEDGE PARTNER

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