

FASHION

PROGRAMME IMPACT & LEARNING

INVESTMENT & FOCUS

TOTAL COMMITTED
€38.2M

€158M
LEVERAGED
(NON-FFG PARTNERS)

€1.9B
LEVERAGED
(FFG)

41 PARTNERS
3 GEOGRAPHIES
of STRATEGIC FOCUS
SOUTH ASIA SOUTH-EAST ASIA EU

JANUARY 2020 - DECEMBER 2023

our EVIDENCE SHOWS **STRONG PROGRESS**

IMPACT & PROGRESS

TOP THREE B RUBRIC RATINGS & JUSTIFICATIONS from EVIDENCE



KEY POCKETS of SUCCESS:

MAJOR BRANDS LIKE H&M, GAP, and MANGO ARE LEADING CLIMATE-POSITIVE INITIATIVES by FINANCING DECARBONISATION PROJECTS AND ADOPTING SCIENCE-BASED TARGETS.

INVESTMENTS in NEXT-GEN MATERIALS and CIRCULAR PRACTICES ARE INCREASING, & GRASSROOTS MOVEMENTS LIKE EFFORTS in MANUFACTURING CLUSTERS LIKE SURAT, INDIA, ARE BEGINNING TO SHOW PROMISSES.

KEY AREAS of RESISTANCE

DESPITE SOME PROGRESS, MOST LARGE FASHION COMPANIES RESIST ADOPTING MEANINGFUL CLIMATE-POSITIVE PRACTICES.

GREENWASHING is PREVALENT, ACCOUNTABILITY MECHANISMS ARE WEAK, and SCALING INNOVATIONS IS SLOW.

REGIONS with LIMITED REGULATORY OVERSIGHT HINDER INDUSTRY-WIDE PROGRESS.

CREATING SIGNIFICANT ROADBLOCKS TO RESPONSIBLE LEADERSHIP in THE SECTOR. FAST-FASHION BRANDS ARE ADAPTING INSTANT-FASHION MODELS in a POTENTIAL RACE TO THE BOTTOM

KEY POCKETS of SUCCESS:

POLICIES AFFECTING the FASHION SECTOR LIKE THE ESPR and WASTE FRAMEWORK DIRECTIVE ARE FOSTERING SUSTAINABILITY by ENCOURAGING RESPONSIBLE PRACTICES AND INTEGRATING SUSTAINABILITY INTO PRODUCTION LINES.

THE LIKELY INTRODUCTION of EXTENDED PRODUCER RESPONSIBILITY WILL PROMOTE PRODUCT STEWARDSHIP ACROSS the LIFE CYCLE OF CLOTHING

KEY AREAS of RESISTANCE

IMPLEMENTATION OF THESE POLICIES FACES CHALLENGES, ESPECIALLY OUTSIDE the EU. MARGINALISED VOICES, INCLUDING SUPPLY CHAIN WORKERS, ARE OFTEN EXCLUDED FROM POLICY DISCUSSIONS.

FAST FASHION COMPANIES ARE RELUCTANT to ENGAGE WITH THE POLICIES, AND RELIANCE on PRODUCTION in COUNTRIES WITH WEAKER REGULATIONS LIMITS the GLOBAL IMPACT OF THESE POLICIES.

KEY POCKETS of SUCCESS:

COALITIONS SUCH AS the REGENERATIVE PRODUCTION LANDSCAPE COLLABORATIVE (RPLC) DEMONSTRATING ALTERNATE SOURCING MODELS where BRANDS COLLABORATE WITH CSOs, GOVERNMENTS AND COMMUNITIES IN KEY SOURCING REGIONS WITH THE AIM TO HAVE POSITIVE IMPACT on CLIMATE, NATURE AND PEOPLE HAVE BEGUN to ATTRACT INVESTMENTS.

KEY AREAS of RESISTANCE

WHILE BRANDS ARE COMMITTING to SUSTAINABILITY TARGETS AT ONE END, WE ARE YET TO SEE MAJOR FINANCING FLOW into DEEPER, SECTORAL TRANSFORMATION.

IN LANDSCAPES, WHILE WE HAVE EARLY PROOF POINTS OF BUSINESS ENGAGEMENTS AND FUNDING, THE MODEL HAS NOT YET BECOME MAINSTREAM, LACKING LONG-TERM COMMITMENT & INVESTMENTS FROM THE INDUSTRY.

DIRECTION of TRAVEL

→ IMPROVING
↓ STABLE
← BACKSLIDING

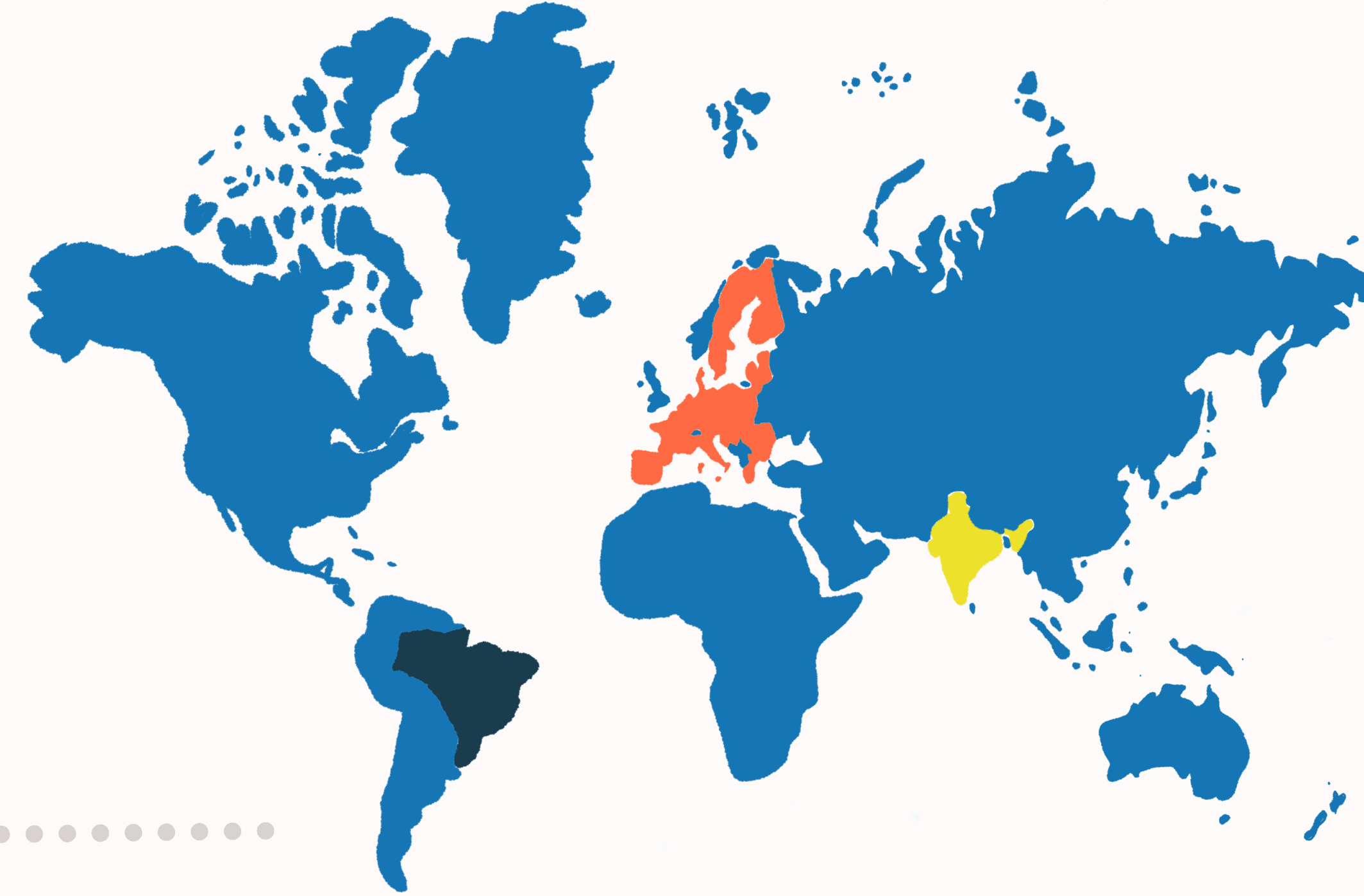
COLOUR LEGEND

● HARMFUL
● UNCONDUCTIVE
● PARTIALLY CONDUCTIVE
● CONDUCTIVE & SUPPORTIVE
● THRIVABLE

220 STORIES of CHANGE
86 STORIES RANKED "MOST SIGNIFICANT"
MEANING THEY HAVE a HIGH DEGREE OF BREADTH, DEPTH, STICKINESS, STRATEGIC RELEVANCE and CONTRIBUTION FROM LAUDES

TOP 3 GEOGRAPHIES of IMPACT

EU - BRAZIL - INDIA / GLOBAL



1. NEXT-GEN & CIRCULAR MATERIALS on FASHION INDUSTRY'S AGENDA

PROBLEM THE FASHION INDUSTRY CONTINUES to RELY HEAVILY on FOSSIL-FUEL BASED MATERIALS WITHIN LINEAR BUSINESS MODELS.

WHAT HAPPENED?

PARTNERS SUCH AS FASHION for GOOD, BIOMIMICRY INSTITUTE & CANOPY HAVE CONTRIBUTED TO BRINGING CIRCULAR MATERIAL INNOVATIONS ONTO THE INDUSTRY'S RADAR. WORKING with BRANDS & RETAILERS, MATERIAL INNOVATIONS, AND ACROSS THE SUPPLY CHAIN, THESE GROUPS LOOK AT BOTH SUPPLY OF MATERIALS and DEMAND FROM BRANDS TO DRIVE AND INFLUENCE THE SCALE OF ADOPTION.

KEY OUTCOME THE INDUSTRY NOW RECOGNISES INNOVATIVE, NEXT-GEN MATERIALS AS a WAY TO ACHIEVE THEIR SUSTAINABILITY & CIRCULARITY TARGETS, AND IS BEGINNING to INVEST IN THEM. TO DRIVE COMMERCIALISATION, PARTNERS ARE WORKING TO BUILD the BUSINESS CASE (AKA COST/PRICING), AS THIS IS a KEY BARRIER HOLDING THESE INNOVATIONS BACK in GOING FROM NICHE to NORM.

2. SETTING STANDARDS ACROSS the INDUSTRY

PROBLEM THE FASHION INDUSTRY'S SELF-REGULATION HAS LIMITED SUCCESS in ADDRESSING THE ENVIRONMENTAL & SOCIAL ISSUES CREATED IN THE SUPPLY CHAIN. BECAUSE THERE IS a LACK OF BUSINESS CASE TO TRULY TACKLE THESE PROBLEMS.

WHAT HAPPENED? SINCE 2020, PARTNERS SUCH AS EEB, ECOS, FTAO, FASHION REVOLUTION and CCC (IN TOTAL OVER 65 NGOs) CONTRIBUTED to the INTRODUCTION of a EU TEXTILES STRATEGY IN 2022, WHICH WAS ENDORSED BY 53 MEPs. THE EU TEXTILES STRATEGY HAS SINCE LED TO SPECIFIC LAWS TO PROMOTE & IMPROVE PRODUCER RESPONSIBILITY for WASTE, AND SUPPORT CIRCULARITY in the TEXTILES SECTOR, SUCH AS THE ECODESIGN REGULATION AND EXTENDED PRODUCER RESPONSIBILITY. INDUSTRY AGNOSTIC LEGISLATION SUCH AS CORPORATE SUSTAINABILITY DUE DILIGENCE WILL ALSO LEAD to a MORE FAIR AND JUST SUPPLY CHAIN.

KEY OUTCOME ECODESIGN FOR SUSTAINABLE PRODUCTS REGULATION (ESPR) PASSED IN 2024, WILL LEAD TO MINIMUM REQUIREMENTS for FASHION ENTERING THE EU MARKET, LEVELING THE PLAYING FIELD. THESE STANDARDS ARE BEING DEVELOPED NOW, AND WILL BE IMPLEMENTED in EARLIEST 2026.

3. ESTABLISHING EARLY PROTOTYPES in ALTERNATIVE FIBRE SOURCING MODELS

PROBLEM EXTRACTIVE LAND-USE PRACTICES, EXACERBATED BY THE TEXTILES INDUSTRY, IS LEADING to ECOSYSTEM DEGRADATION AFFECTING SOIL, WATER, BIODIVERSITY, CLIMATE and PEOPLE.

WHAT HAPPENED? PARTNERS DEVELOPED REGENERATIVE PRODUCTION LANDSCAPE COLLABORATIVE (RPLCs)-MULTI-STAKEHOLDER RELATIONSHIPS BETWEEN BRANDS, GOVERNMENT, COMMUNITIES and PARTNERS. BRANDS SUCH AS H&M AND INDITEX ARE DEMONSTRATING the VALUE of LONGER-TERM, HOLISTIC FINANCIAL & NON-FINANCIAL APPROACHES to AGRICULTURE IN THE SUPPLY CHAIN.

KEY OUTCOME THE RPLCs COVERED OVER 1M HECTARE OF LAND and 300.000 FARMERS. THROUGH PARTNERSHIPS LIKE THE ORGANIC COTTON ACCELERATOR, FARMERS RECEIVED a 12 MILLION PREMIUM FOR THEIR COTTON.



LEARNING

OUR CONTEXT is SHIFTING & WE ARE ADAPTING

OVERALL, WE SEE a MIX OF CLOSED DOORS, OPEN DOORS AND BRICK WALLS

OPEN DOORS

- ★ LEADING FASHION BUSINESSES CAN PIONEER SUSTAINABILITY BY EMBRACING NEW REGULATIONS LIKE the ECODESIGN FOR SUSTAINABILITY PRODUCTS REGULATION.
- ★ POLICY SHIFTS PROMOTING SUSTAINABLE PRODUCTION & MANDATING SUPPLY CHAIN TRANSPARANCY PROMOTE SUSTAINABLE PRODUCTION.
- ★ MOVEMENTS FOR TRANSPARANCY & SUSTAINABLE MATERIALS ARE GAINING SUPPORT FROM BRANDS AND GOVERNMENTS.

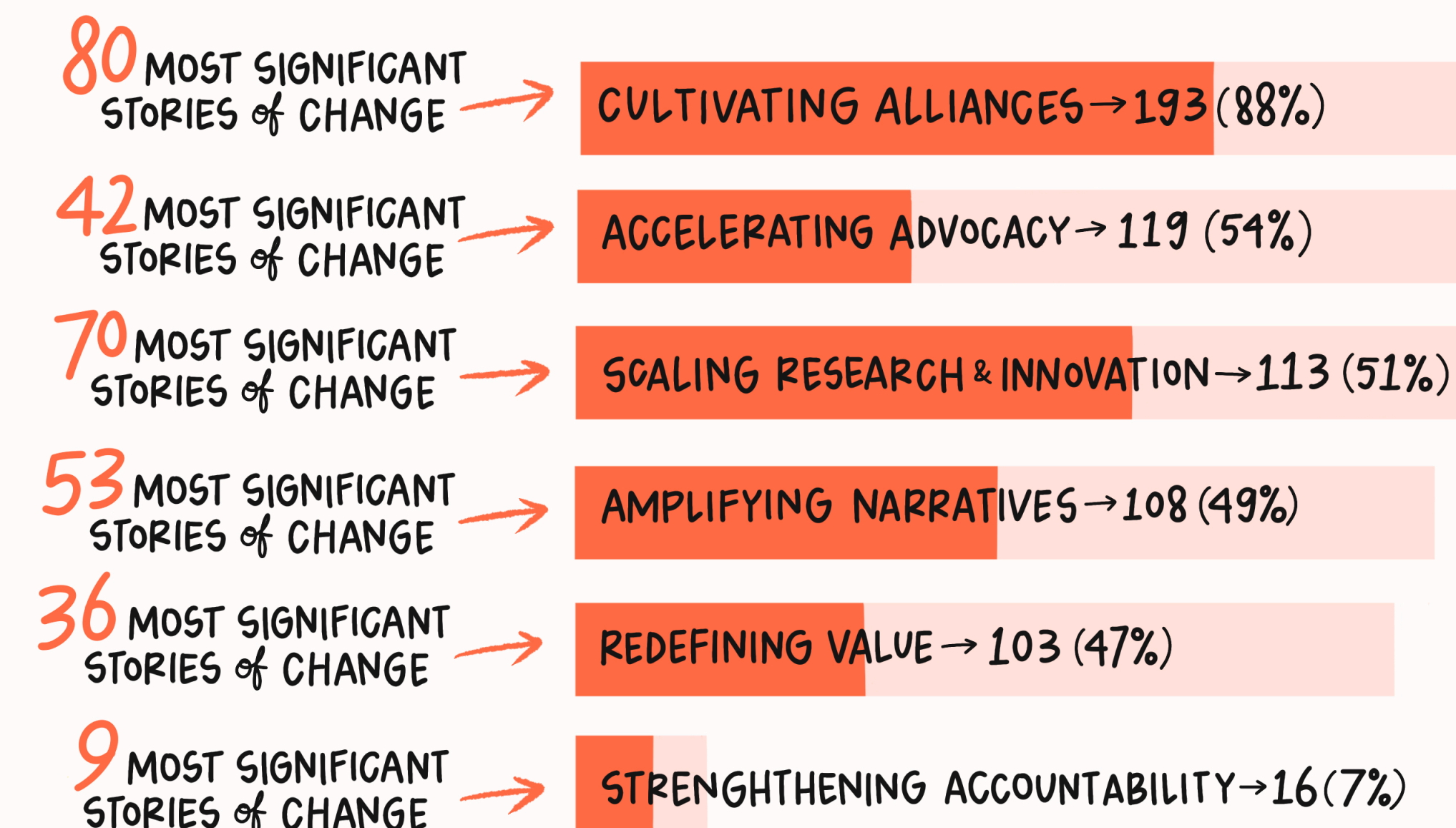
CLOSED DOORS

- ★ SHORT-TERM PROFITABILITY OUTWEIGHS ENVIRONMENTAL COMMITMENTS.
- ★ LACK OF ENGAGEMENT WITH PRODUCER COUNTRIES IN the GLOBAL SOUTH LIMITS TRANSFORMATION.
- ★ UNSUSTAINABLE SUPPLY CHAINS & MINIMAL RECYCLING INFRASTRUCTURE HINDER INDUSTRY TRANSFORMATION.

BRICK WALLS

- ★ ULTRA FAST FASHION GROWTH & GREENWASHING UNDERMINE PROGRESS.
- ★ THE RACE TO THE BOTTOM ON PRICE is FURTHER PERPETUATING THE RELIANCE ON SYNTHETIC FIBRES.
- ★ SHORT-TERM PROFITABILITY OUTWEIGHS ENVIRONMENTAL COMMITMENTS.
- ★ THE EMBEDDED LOW-COST, HIGH-VOLUME PRODUCTION MODEL & EXCLUSION OF PRODUCER COUNTRIES BLOCK EFFECTIVE POLICIES.

CULTIVATING ALLIANCES, ACCELERATING ADVOCACY & SCALING RESEARCH and INNOVATION are DRIVING CHANGE:



EXAMPLE: REGENERATIVE PRODUCTION LANDSCAPE COLLABORATIVES (RPLCs) WERE BROUGHT TOGETHER in 2023 to CREATE a COMMON VISION to SCALE LANDSCAPE-BASED APPROACHES across 50 MILLION HECTARES of LAND BY 2035



EXAMPLE: THE EUROPEAN ENVIRONMENTAL BUREAU (EEB), ECOS and FTAO PLAYED a SIGNIFICANT ROLE IN SHAPING THE EU'S STRATEGY for SUSTAINABLE and CIRCULAR TEXTILES, WHICH INTRODUCED REGULATIONS SUCH AS the ECODESIGN REGULATION and the CORPORATE SUSTAINABILITY DUE DILIGENCE DIRECTIVE.



EXAMPLE: THE FULL CIRCLE TEXTILES PROJECT, SUPPORTED BY LAUDES FOUNDATION, FACILITATED the TECHNICAL VALIDATION OF NEXT-GEN FIBERS AND THEIR INTEGRATION INTO THE SUPPLY CHAINS OF LEADING BRANDS, DEMONSTRATING the VIABILITY OF THESE INNOVATIONS