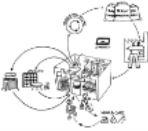
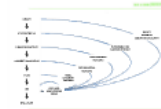
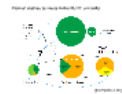


RINGMAJANDUS MOEBRÄNDI KONTEKSTIS



Karli Kart Plaza, PND  
5. oktober 2017



Conclusion

# RINGMAJANDUS MOEBRÄNDI KONTEKSTIS



Kerli Kant Hvass, PhD

5. oktoober 2017

## The rise of fast fashion

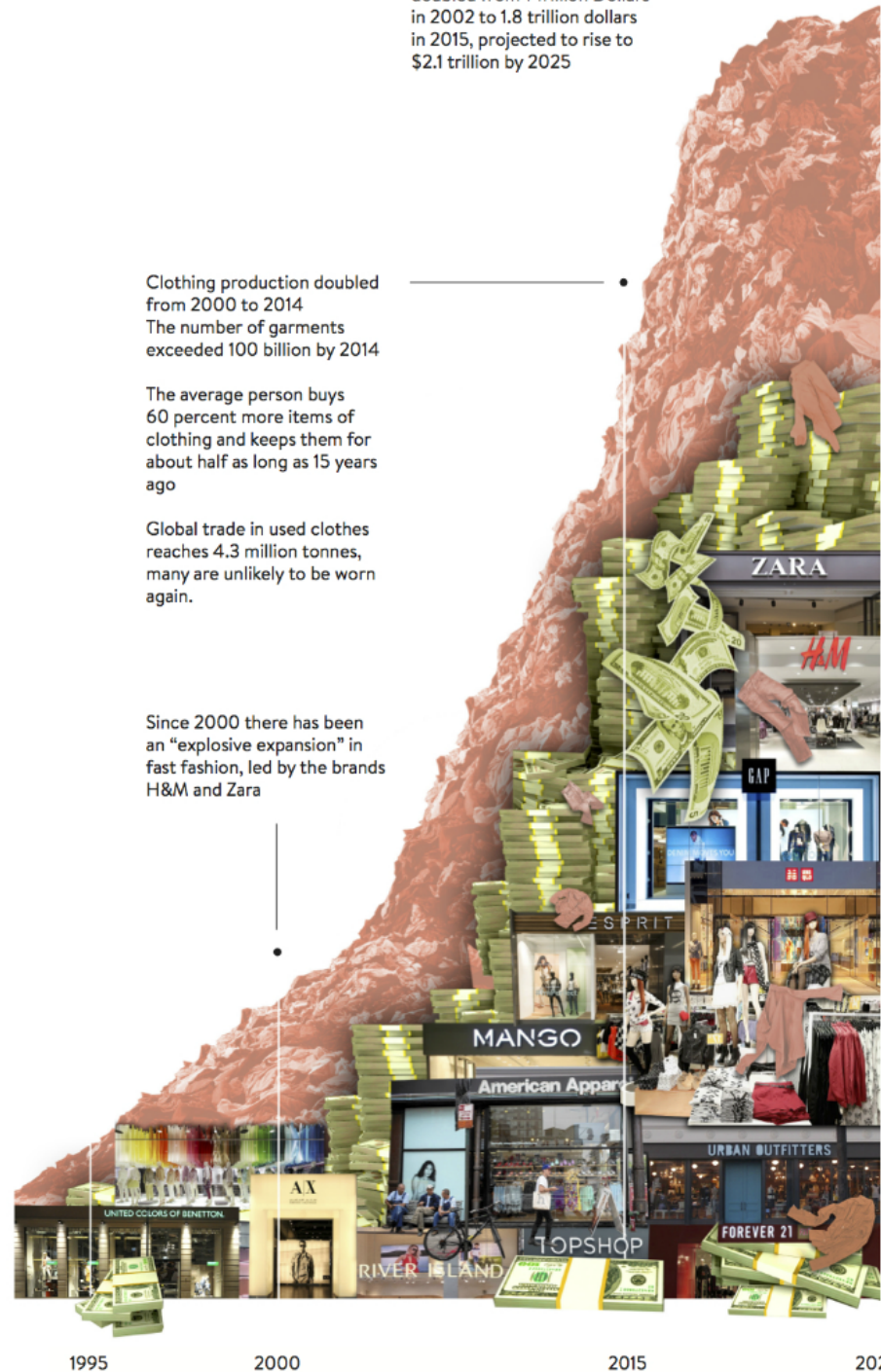
Sales of clothing have nearly doubled from 1 Trillion Dollars in 2002 to 1.8 trillion dollars in 2015, projected to rise to \$2.1 trillion by 2025

Clothing production doubled from 2000 to 2014  
The number of garments exceeded 100 billion by 2014

The average person buys 60 percent more items of clothing and keeps them for about half as long as 15 years ago

Global trade in used clothes reaches 4.3 million tonnes, many are unlikely to be worn again.

Since 2000 there has been an "explosive expansion" in fast fashion, led by the brands H&M and Zara



1995

2000


2015

2025

## FASHION CONSUMPTION

- Cheap prices and increased consumption
- Consumers' expectations - new, cheap and trendy
  - Quantity vs. quality
- Planned obsolescence (emotional & functional)
- Throw-away culture and DISPOSABLE fashion

**Mini Sophie Bag**  
by Simone Kordtman  
[www.simonekordtman.com](http://www.simonekordtman.com)





**SOFT OR STRUCTURED?**  
Forget fluidity, start looking for structure instead. Like, is the factory your jacket was sewn in structured to be a safe working environment?

**MAKE IT TRANSPARENT**  
Need we say more? Transparent, visible, not hidden. Obscurity is soooooo last century!!

**Skirt by Linda Swales**  
[www.lindaswales.com](http://www.lindaswales.com)

**Top and Trousers**  
by Moschino  
[www.moschino.com](http://www.moschino.com)

# this season's must-haves

**PUMP UP THE VOLUME**  
More more more!! With 150 billion pieces of clothing manufactured every year,<sup>10</sup> do you really need more volume in your wardrobe?

**THE RETURN OF POWER DRESSING**  
This season it's all about power, YOUR power! And it's not the 80s anymore, it's the globalised 21st century. So who's really being empowered by your purchases?

**BARE THREADS**  
we are talking visible threads. Make them fluorescent. The threads that unite you with the people who make your clothes.....make sure you can see them.

**Top and Trousers**  
by Moschino  
[www.moschino.com](http://www.moschino.com)

**Lonely Rows Crews: Turtleneck jacket and Skirt**  
by Raul  
[www.raul.com](http://www.raul.com)

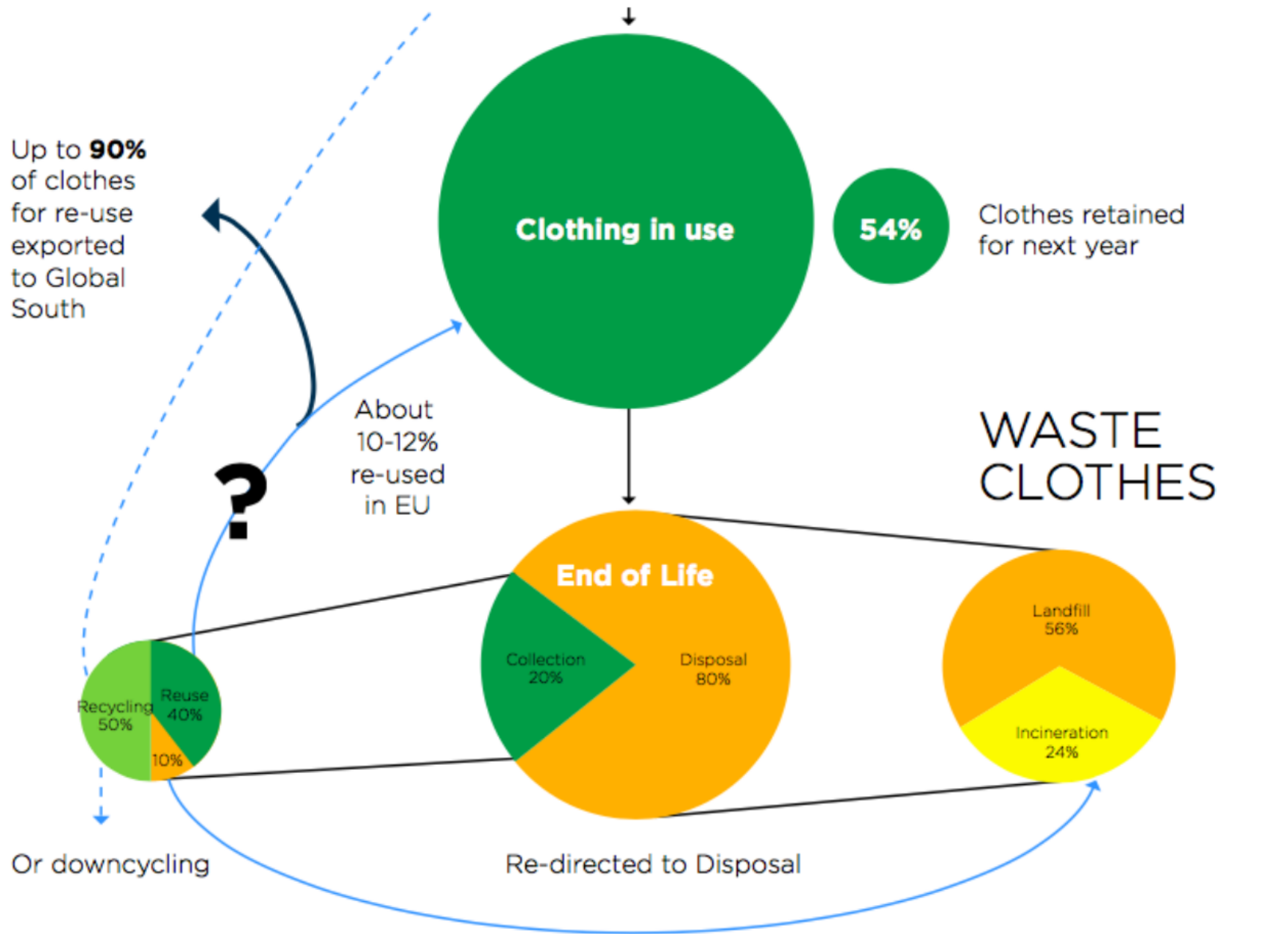
**Trench Coat by Gino Corbelli**  
[www.ginocorbelli.com](http://www.ginocorbelli.com)

**Top by Julie Ruffie** [www.julieruffie.com](http://www.julieruffie.com)





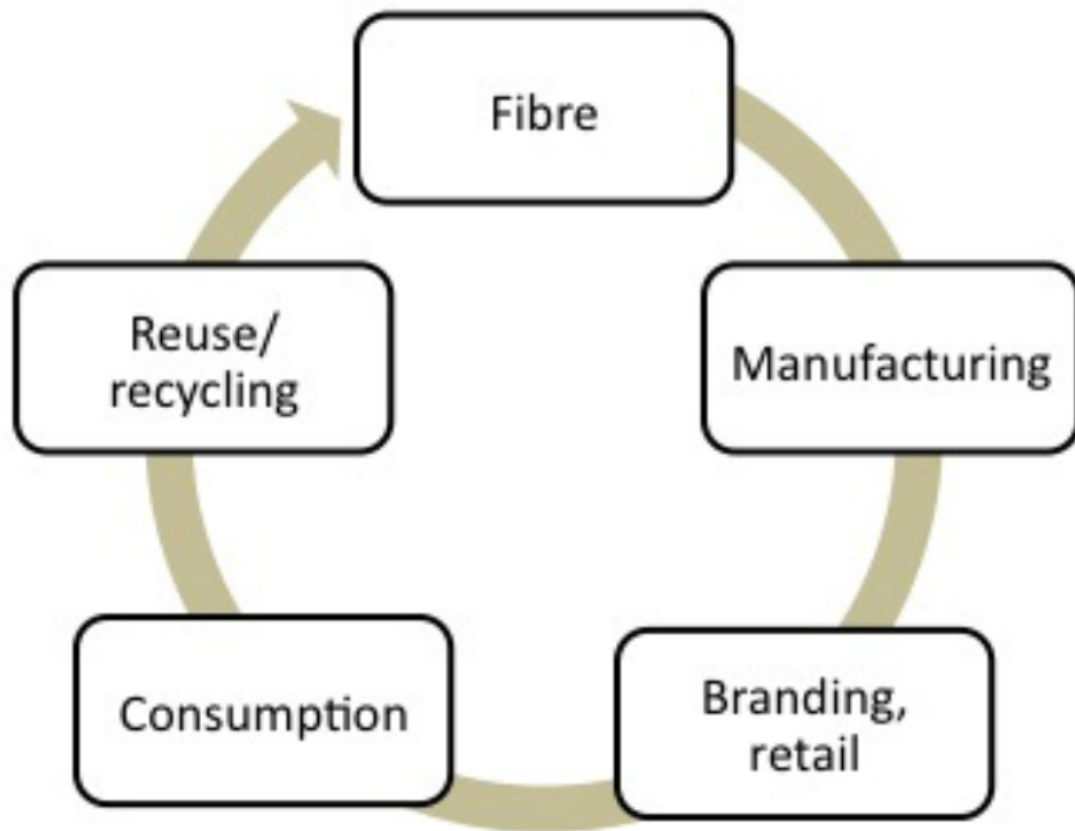
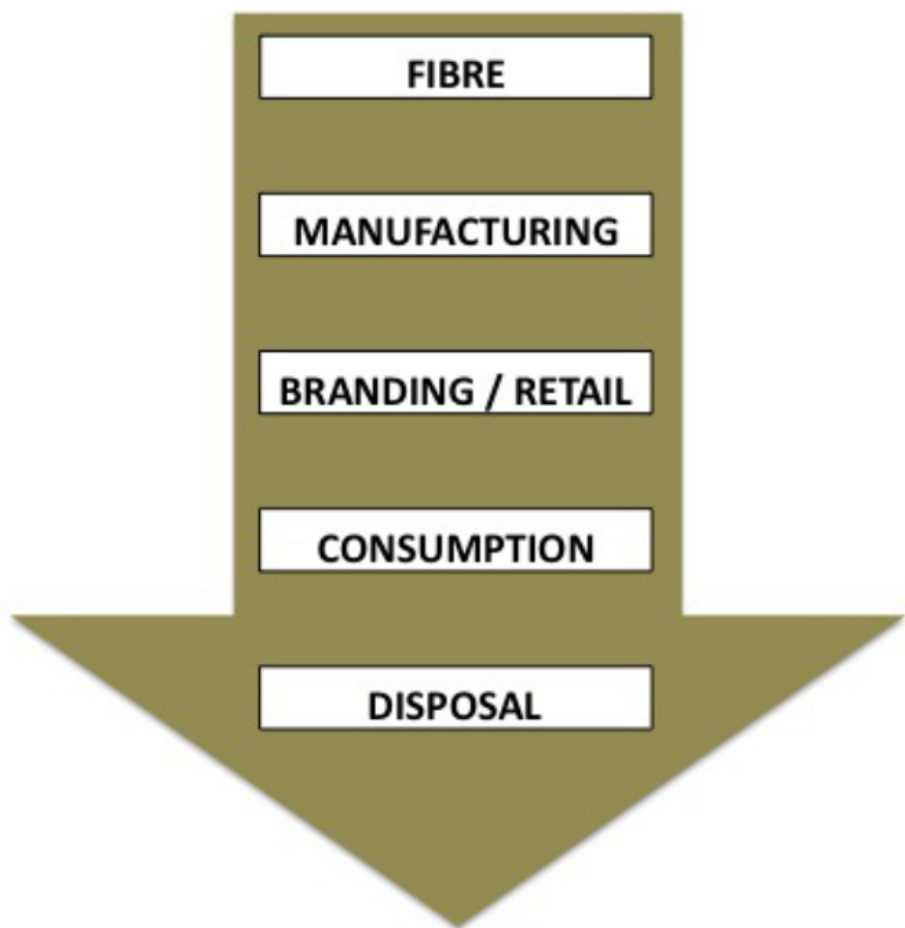

# Flow of clothes to waste in the EU 27, annually



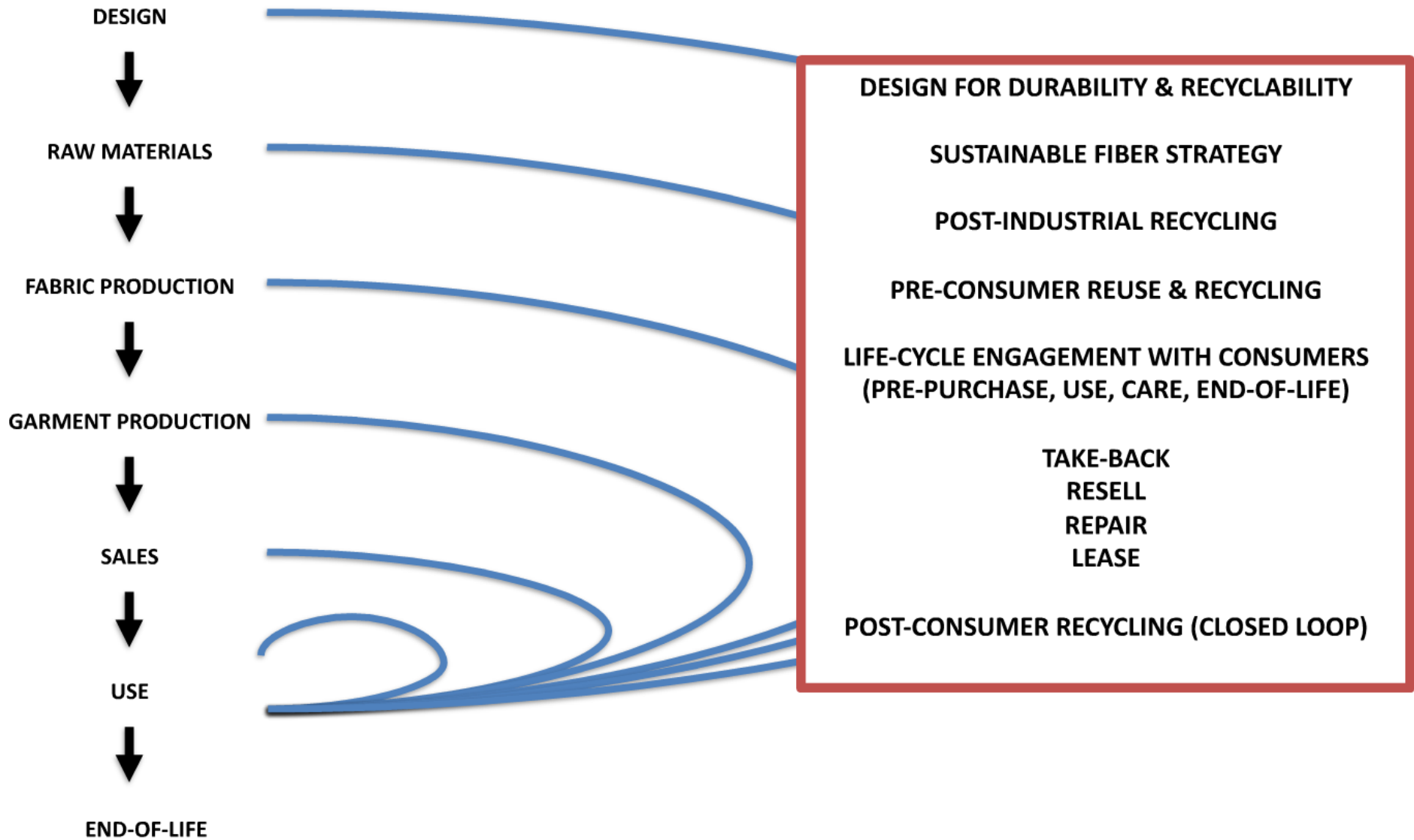
## FASHION INDUSTRY'S ROLE

- Designers and producers of fashion waste
  - Direct contact to end consumers
  - Extended producer responsibility



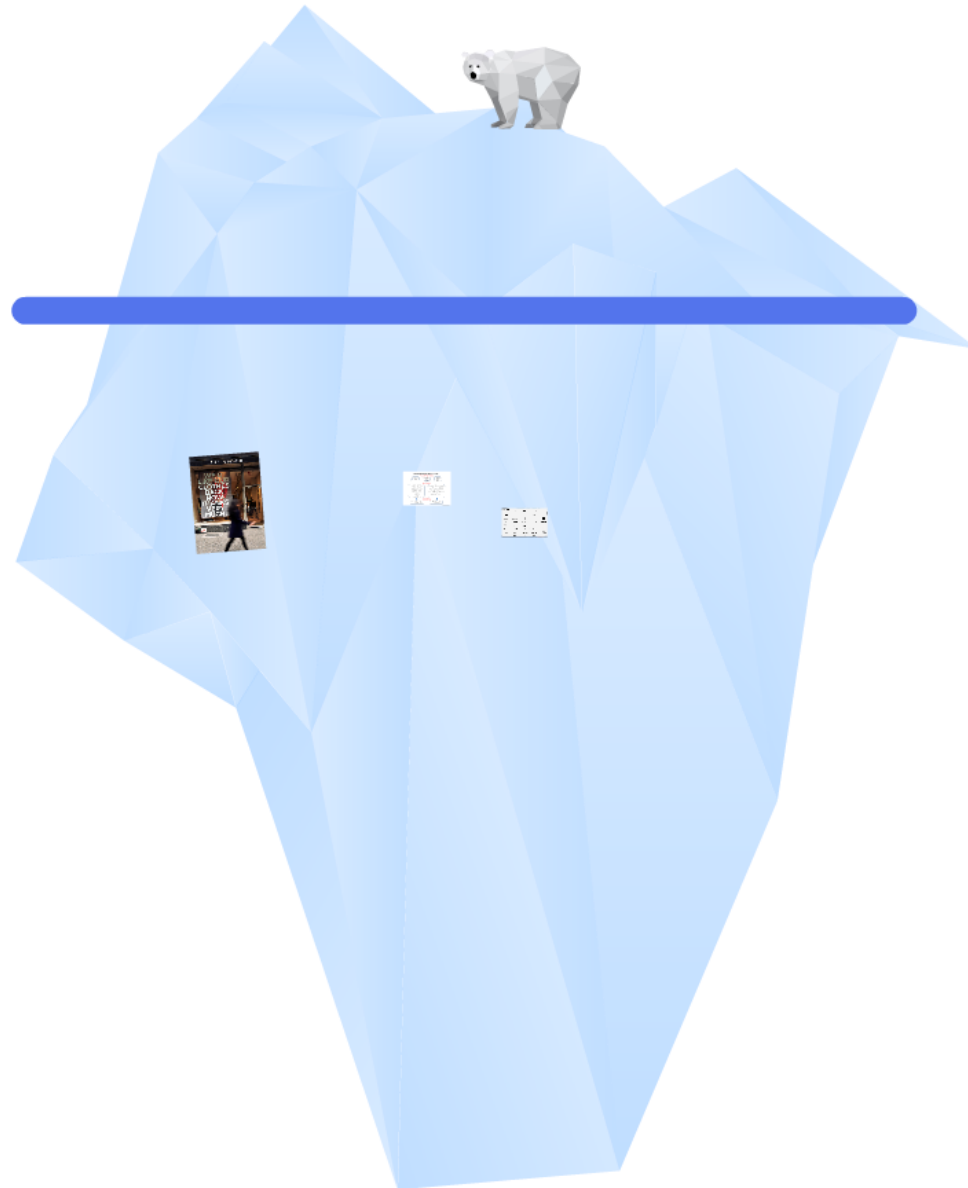


# FROM LINEAR TO CIRCULAR





# NEW OPPORTUNITIES



EILEEN FISHER

WE'D  
LIKE OUR  
CLOTHES  
BACK  
NOW  
THANKS  
VERY  
MUCH.

THXVERYMUCH

Starting April 30, donate your gently worn EILEEN FISHER clothing and receive \$5 in Recycling Rewards per item. GREEN EILEEN is a proud, ongoing initiative that benefits women and girls.

SPRINKLERS  
IN BASEMENT  
& STAIRWAY ONLY

PETITE  
COLLECTOR

Mon-Sat 10-7  
Sun 12-4

EXIT

THXVERYMUCH  
How does the store support  
wind power?





adidas

aialu

ASOS  
discover fashion online

aurora sofia®

BESTSELLER®



  
B O N A G R E W

B Y T



  
contextura



Dhana 

  
DESIGNERS REMIX  
CHARLOTTE ESKILDSEN



ECOALF



Filippa K

FONNESBECH

GANNI

gina**tricot**



hessnatur

H&M

HUGO BOSS

INDITEX

Joseffa  
LIVE TWICE

KappAhl

 Knowledge Cotton Apparel



KERING  


  
LACOSTE

LINDEX

LISSOME

LOOMSTATE

MADS  
NØRGAARD  
COPENHAGEN

MARA HOFFMAN

M&S



MONKL

NORRØNA 

# FASHION COMPANIES' PRODUCT END-OF-LIFE STRATEGIES

## PRODUCT RETURNS MANAGEMENT

INDEPENDENT  
IN-STORE  
COLLECTION

COLLECTION  
PARTNERSHIP  
WITH A  
CHARITY

IN-STORE  
COLLECTION WITH A  
CONTRACTED  
PARTNER

## OPERATIONAL STRATEGY

- **RESELL OF OWN BRAND**
  - Eileen Fisher, Filippa K, Boomerang
- **REUSE OF OWN BRAND**
  - Patagonia partnership with eBay
- **UPCYCLING/REDESIGN**
  - Boomerang Effect Home Collection
  - Cheap Monday upcycled collection
- **REPAIR**
  - Nudie Jeans, Levi's
- **LEASE**
  - Filippa K, MUD Jeans, VIGGA

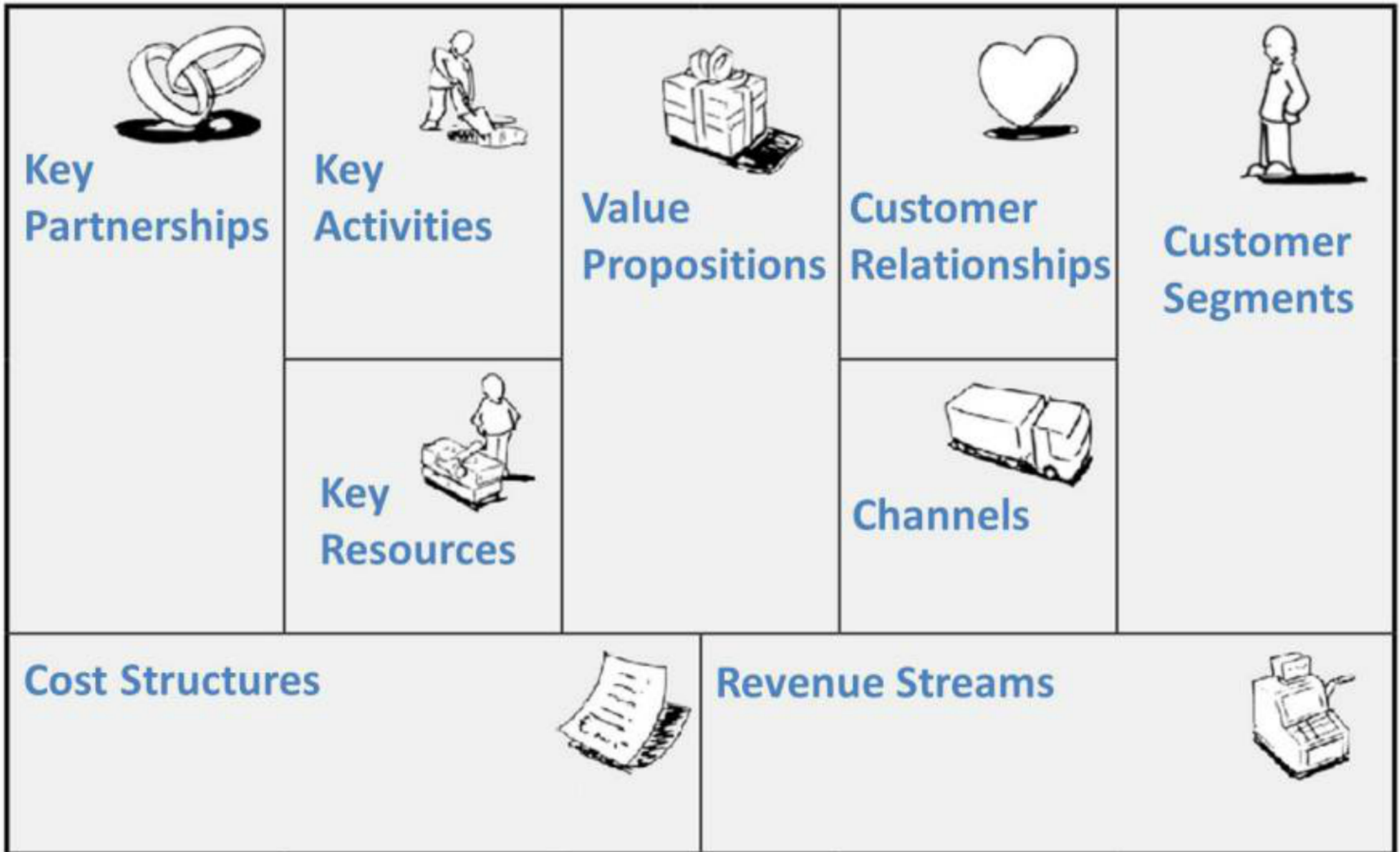
- **DONATION TO REUSE AND RECYCLING MARKETS**
  - M&S Shwopping with Oxfam, ZARA
- **SELL TO REUSE AND RECYCLING MARKETS**
  - H&M and I:Co, Levi's and I:Co
- **CLOSED LOOP RECYCLING**
  - Own brands, e.g. Patagonia Common Threads Initiative, EcoCircle
  - Mixed brandse, e.g. H&M and I:Co

## RESOURCE EFFICIENCY (Stahel and Reday (1976/1980))

**PRODUCT SPECIFIC (Loop 1)**  
focus on long-life products, reuse and  
product life extension

**MATERIAL SPECIFIC (Loop 2)**  
focus on waste reduction and  
recycling of materials

# Ärimudeli innovatsioon





- Macro**
- Lack of consumer awareness and enthusiasm
  - Fragmented revenue streams (subscriptions, resale, licensing)
  - Lack of technology (patting & recycling)
    - Complex supply chains
  - Uncertainty of innovation collaborations
  - Fragmented regulations

- Organizational**
- Organizational silos
  - Lack of internal awareness
  - Lack of management buy-in
  - Lack of alignment with existing strategies and action plans
  - Administrative issues (IT, HR, R&D)
  - Lack of best practices
  - Lack of evidence of financial benefits
  - High up-front costs

- Personal**
- Linear thinking
  - Lack of time

Source: McKinsey & Company, 2018



## **Macro**

- Lack of consumer awareness and enthusiasm
- Fragmented reverse channels (collection, reuse, recycling)
  - Lack of technology (sorting & recycling)
    - Complex supply chains
  - Uncertainty of innovation collaborations
    - Fragmented legislation

## **Organizational**

- Organizational silos
- Lack of internal awareness
- Lack of management buy-in
- Lack of alignment with existing strategies and action plans
  - Administrative lock-in (KPI's, ROI)
    - Lack of best practices
  - Lack of evidence of financial benefits
    - High up-front costs

## **Personal**

- Linear thinking
- Lack of time

## **Preconditions**

- **Long-term business strategy**
- **Supportive governance structure**
- **Supportive organizational culture (organizational learning)**
  - **Cross-organizational collaboration (business model integration)**
  - **Collaboration with knowledge partner**





Aitähh!  
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